UDIO TRAINING

SETTING UP UDIO

Welcome to the training guide for setting up Udio.

In this manual, we'll walk you through how to set up Udio for your business.

The guide provides step-by-step instructions as well as visual aids to make the setup process as easy and efficient as possible. Please follow the steps in numerical order before moving on to the next section.

If you have any questions about the guide or would like more information about a certain step, please send us an email at support@udiosystems.com

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

To begin, click on the 'Settings' section.

Contents

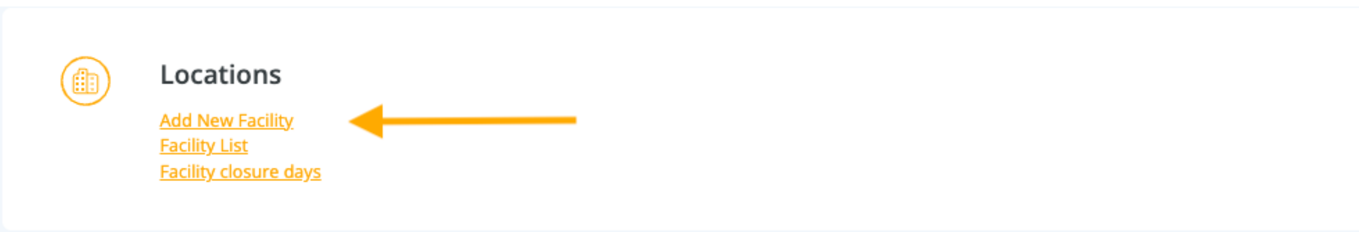
1. **Locations**

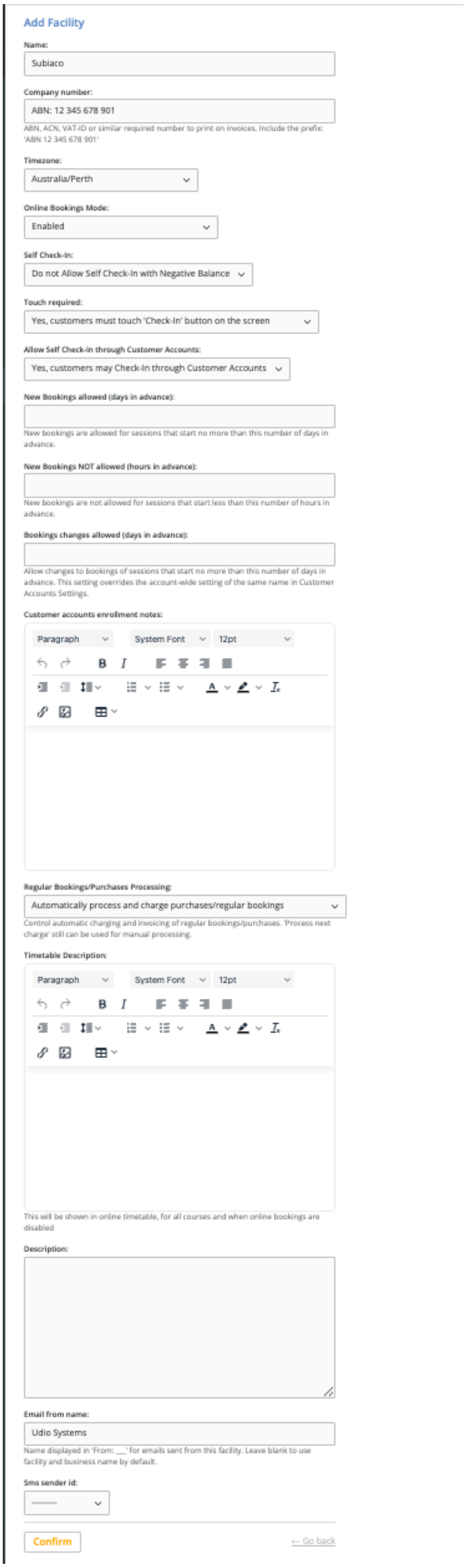
Your primary facility is created when you first sign in. If your business has more than one facility, this section covers the steps required to add an additional facility. You can also add your resource information here, such as a lane, space, room or piece of equipment.

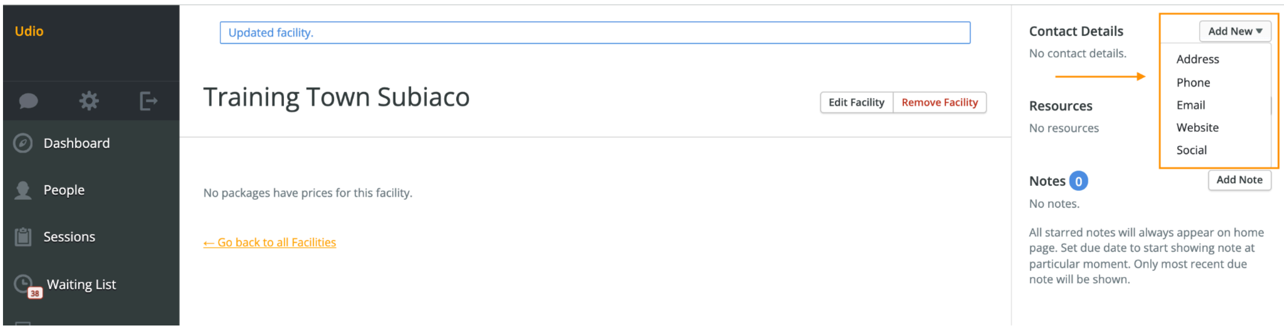
1.1 Add New Facility

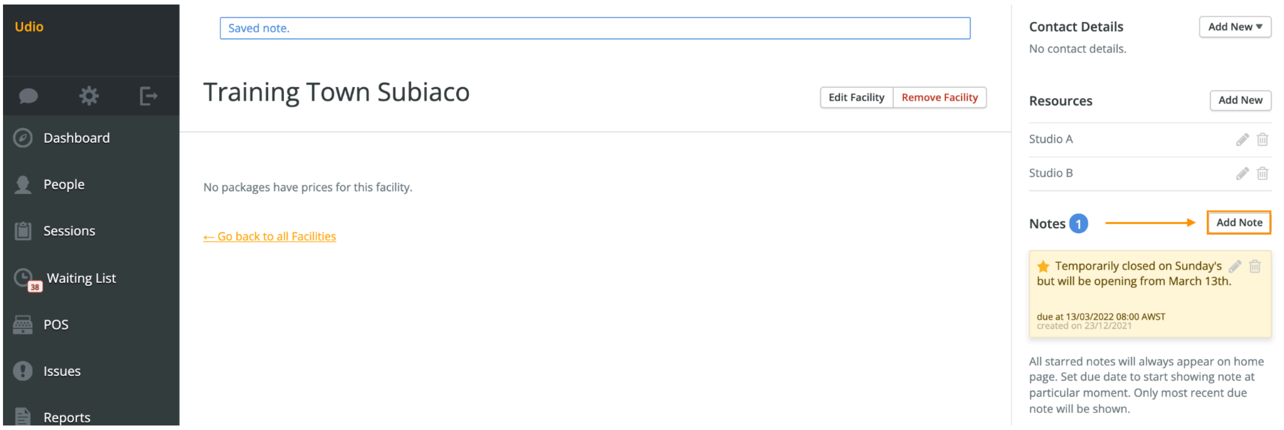
- Click *'Add New Facility'* and enter the name and Company number
- Select your time zone from the dropdown box
- Leave Online Bookings Mode: Enabled
- If you are using self check-in, select either *"Do not Allow Self Check-In with Negative Balance or Allow Self Check-In with Negative Balance"*
- Select either 'Yes, customers
- Select how many days in advance bookings can be made and changed, only use these fields if you have multiple facilities and you want them to be different to the other facilities. For General Settings, update Customer Account Settings

- Customer accounts enrolment notes: this notice is shown in the booking confirmation in the customer portal / App
- Regular Bookings/Purchase Processing: leave Automatic process and charge purchases/regular bookings unless you want to stop your fees being processed
- Timetable Description: this information is displayed in the Timetable
- Add a description if required
- Add an *'Email from name'* which is the sender name when you send emails to customers (leave blank to use business/facility name)
- Select the SMS sender id: you will need to have applied for SMS
- Click *'Confirm'*
- On the next page, add contact details, such as address, phone number and email under *'Add New'* (note: customers will be able to reply to your emails sent via Udio to this email address)
- Add resources by clicking '*Add New', you can add multiple resources at the same time,* add the names and click *'Confirm'*
- Add notes that relate to the facility by clicking on '*Add note*'
- Type the note, tick on the star so the count is displayed and add an attachment if required, click *'Confirm'*
- You will see a blue circle displayed with a number in it indicating a note (notes will be displayed on the dashboard for that facility)




Add Facility
Name:
Subiaco
Company number:
ABN: 12 345 678 901
ABN, ACN, VAT-ID or similar required number to print on invoices. Include the prefix: 'ABN 12 345 678 901'
Timezone:
Australia/Perth
Online Bookings Mode:
Enabled
Self Check-In:
Do not Allow Self Check-In with Negative Balance
Touch required:
Yes, customers must touch 'Check-In' button on the screen
Allow Self Check-In through Customer Accounts:
Yes, customers may Check-In through Customer Accounts
New Bookings allowed (days in advance):
New bookings are allowed for sessions that start no more than this number of days in advance.
New Bookings NOT allowed (hours in advance):
New bookings are not allowed for sessions that start less than this number of hours in advance.
Bookings changes allowed (days in advance):
Allow changes to bookings of sessions that start no more than this number of days in advance. This setting overrides the account-wide setting of the same name in Customer Accounts Settings.
Customer accounts enrollment notes:
Paragraph
System Font
12pt
Regular Bookings/Purchases Processing:
Automatically process and charge purchases/regular bookings
Control automatic charging and invoicing of regular bookings/purchases. 'Process next charge' still can be used for manual processing.
Timetable Description:
Paragraph
System Font
12pt
This will be shown in online timetable, for all courses and when online bookings are disabled
Description:
Email from name:
Udio Systems
Name displayed in 'From: ___' for emails sent from this facility. Leave blank to use facility and business name by default.
Sms sender id:
Confirm
← Go back



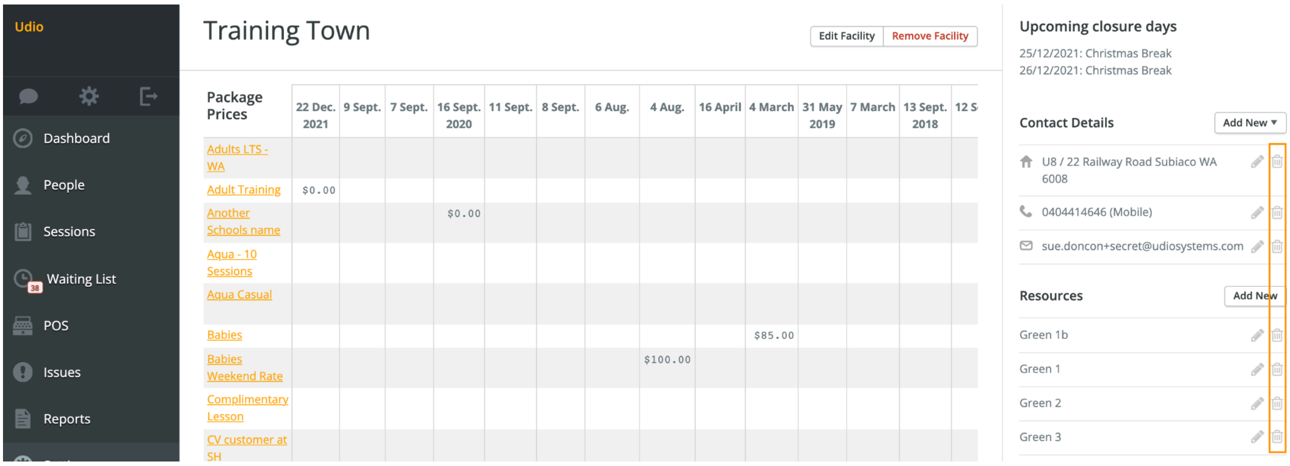


1.1.2 Edit a facility

- From settings, click on '*Configure facilities*' and select the facility you want to edit
- Click on '*Edit facility*' to update the name, ABN, time zone, regular bookings/purchases processing or description
- Click *'Confirm'* after making the changes
- To edit contact details, resources or notes click on the 'pen', make your changes and click *'Confirm'*

1.1.3 Delete information in a facility

- To delete information in contact details, resources and notes click on the trash can and then click on *'Confirm'*



1.2 Facility closure days

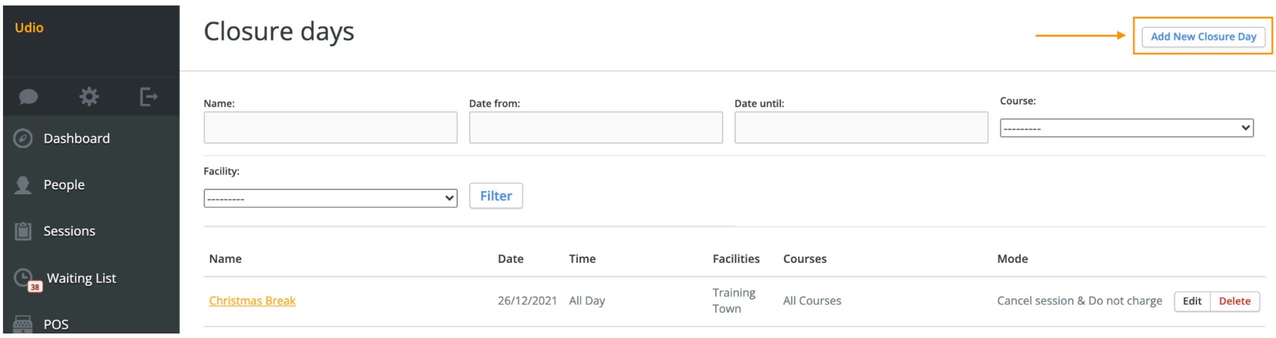
There will be days when your facility or facilities are closed. You can configure those days here, as well as the mode of closure.

Choose from several options, including full days and part days, as well as the billing mode and move behaviour (only use this mode after reaching out to support@udiosystems.com).

Please ensure that you take the time to test this in your Sandbox first to ensure you have the correct charging mode for your business.

1.2.1 Add a new closure day

- From settings, click on *'Configure facility closure days'*
- Select '*Add New Closure Day'*
- Add the name of the closure day, start and end date if you are adding more than one closure day (you can add 14 days at a time), mode of fee raising (see descriptions of these below), move behaviour (please consult Udio if you want to update this field), start and end times should you be closed for a part-day, facilities affected, courses and description (if required)
- Click *'Confirm'* to save the changes



1.2.2 Editing closure days

- Click on the *'Edit'* button and make changes to the name, date, start and end times, mode of fee raising, facilities, courses and description (note: if the fee raising for this period has passed, editing a closure date will not update the fees raised)
- Click *'Confirm'* to save changes

Description of modes:

- *Cancel session & do not charge* – all sessions are cancelled and fees are <u>not</u> raised for this closure date
- *Cancel session & issue credit* – all sessions are cancelled, fees are raised as usual and a credit is applied
- *Cancel session & issue voucher* – all sessions are cancelled, fees are raised as usual and a voucher, such as a make up, is issued
- *Only cancel sessions, charge normally* – all sessions are cancelled with fees raised as usual
- *Free session: do not charge, and do not cancel session*

1.2.3 Deleting closure days

There might be times when you've set closure days and they need to be deleted. Clicking the delete button will start the process of restoring the sessions. This will not re-charge customers. Once all the sessions have been restored, you will need to run the re-charge function or update the *'Regular Bookings/Purchases Processing'* function via '*Edit facility*'.

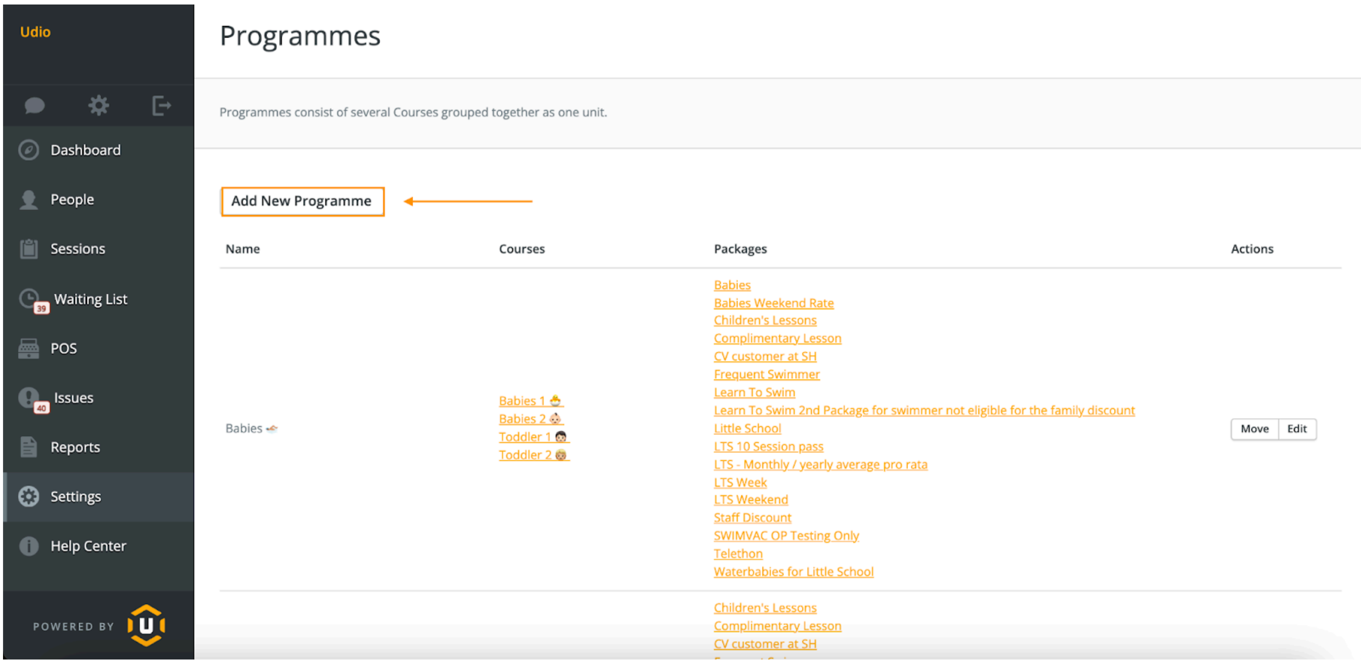
2. Programmes & Courses

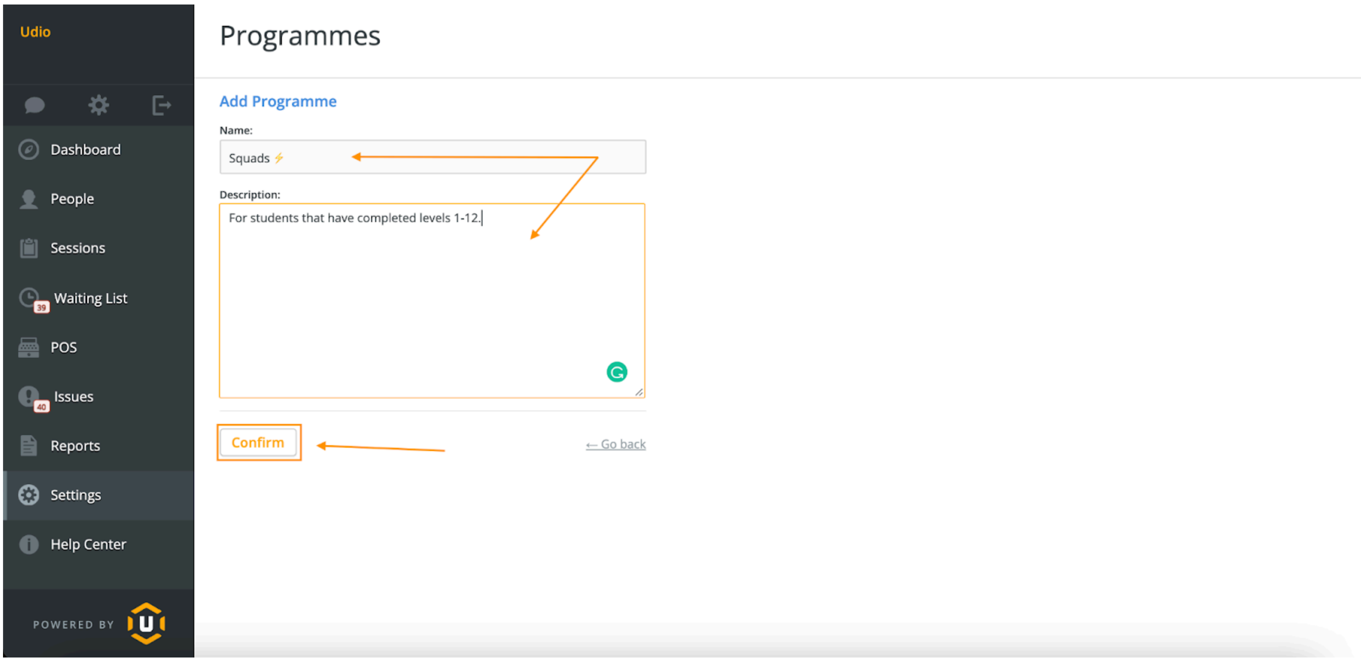
To get started, you need to first set up programmes that are made up of one or more courses. Once you've added your programmes, you can add the courses, pricing and finally the sessions to those courses. For example, you may name one programme "Babies", and courses in that programme might be called "Babies 1", "Babies 2", etc.

2.1 Configure programmes

2.1.1 Adding a new programme

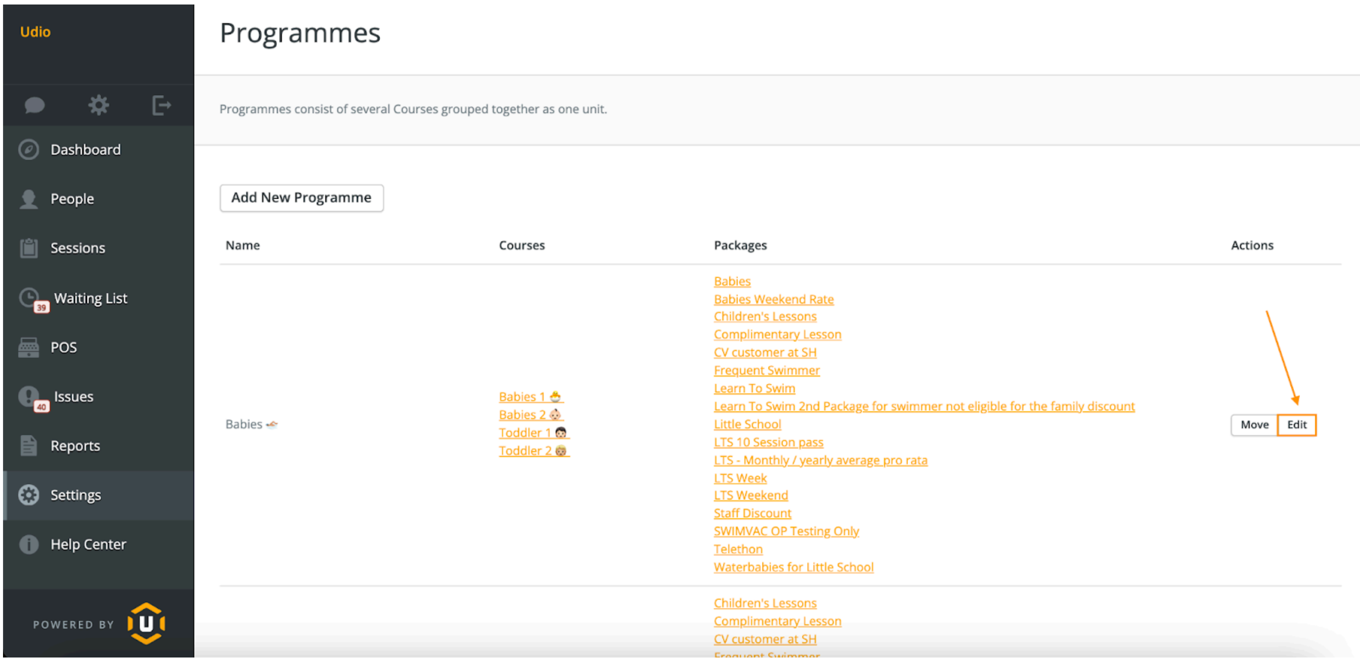
- Click on '*Configure course programmes*' and select '*Add New Programme*'
- Type in the name of the programme and a description (if required)
- Click *'Confirm'*
- Repeat for all programmes in your business





2.1.2 Editing a programme

- Click on the *'Edit'* button next to the programme you need to edit
- Make the changes to name and/or description and click *'Confirm'*

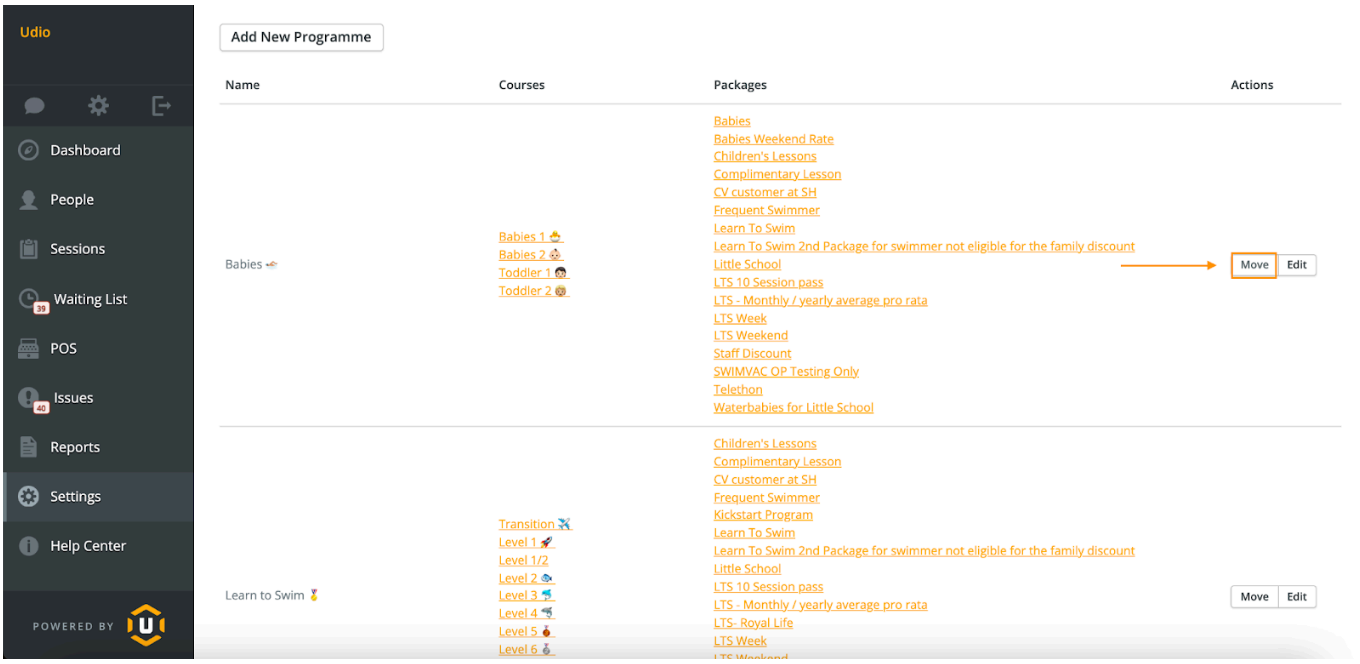


2.1.3 Moving a programme

You can change the order of the programme:

- Click and hold the '*Move*' button
- Move the programme to where you want it to be

The programmes as displayed will be replicated across all the relevant reports.



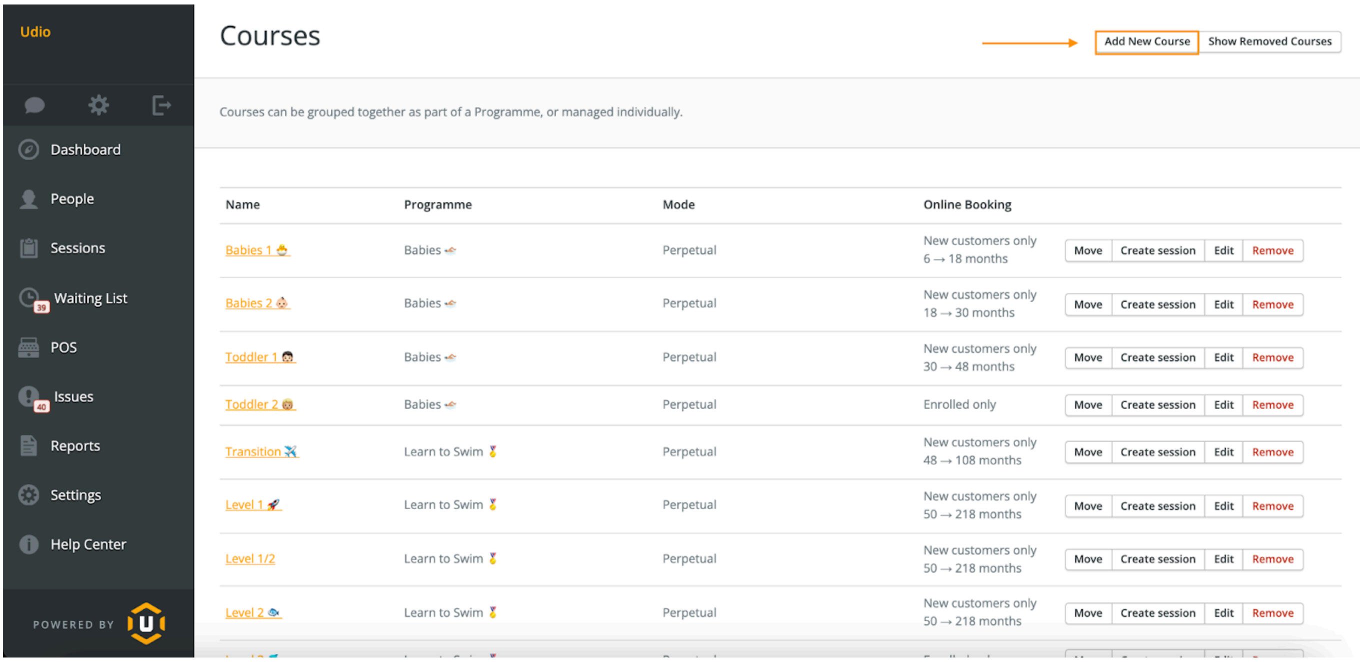
2.2 Configure courses

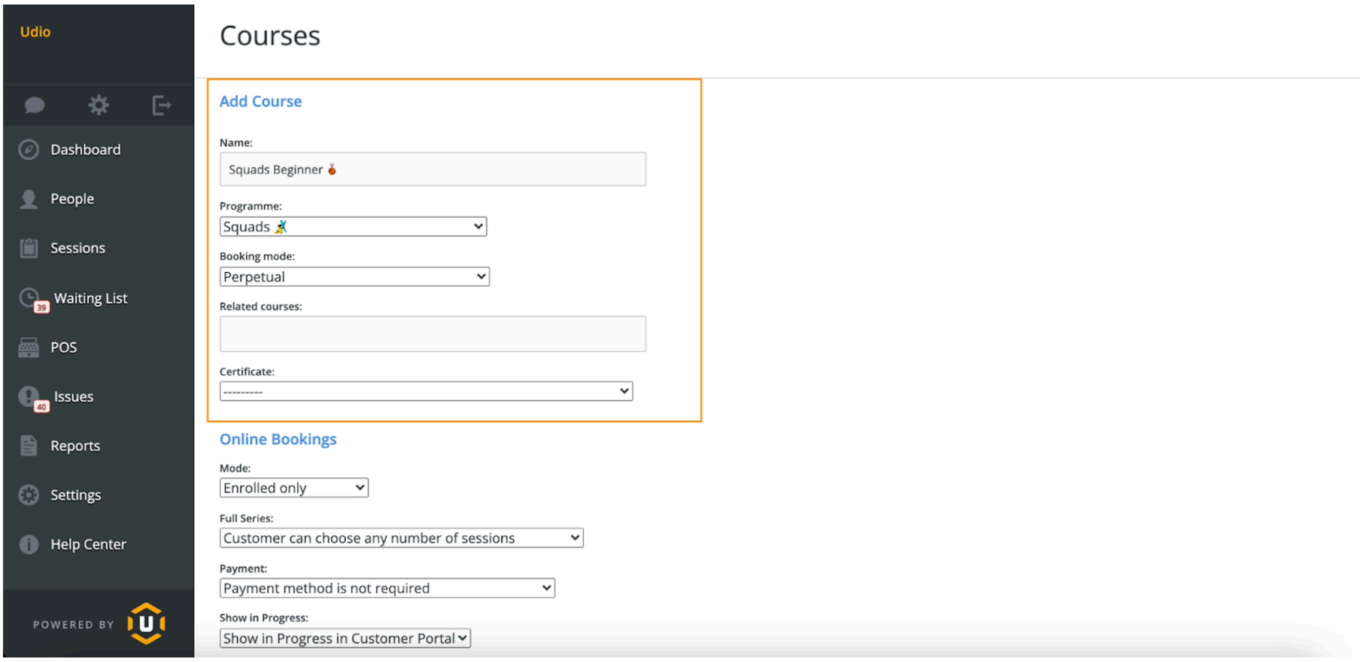
Courses are the levels within your programme.

2.2.1 Adding a new course

- Click on '*Configure courses*'
- Select '*Add New Course*'
- Enter the name of the course and select the programme it falls under

- Select the course booking mode
- Related courses are updated for School Holiday programmes - this will display any achievements in the child's regular course on the School Holiday session
- Choose the certificate from the dropdown box (these need setting up under '*Certificates*' and can be added later)



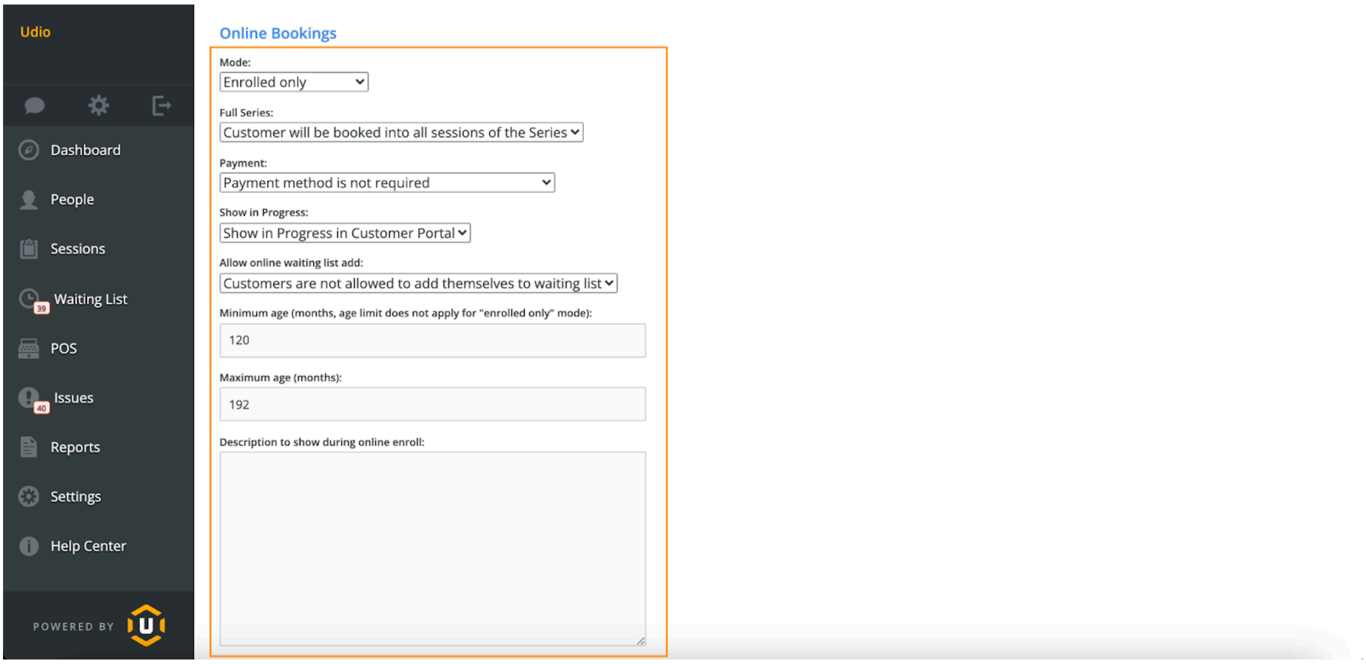


2.2.2 Online Bookings

If you have the customer portal module, you can add filters so that new customers can book directly into a course or returning customers can rebook online.

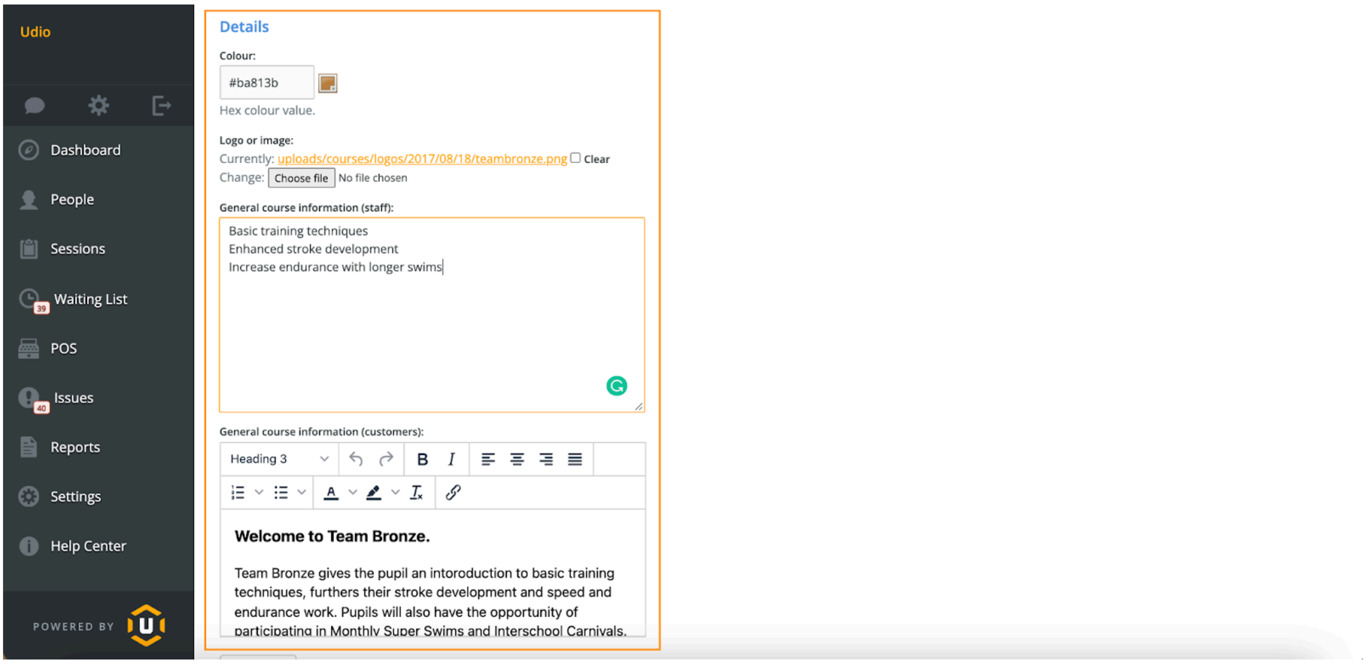
- *Mode* - select the booking mode for your customers to book with for the portal
- *Full series* (voucher and term-based bookings) - select 'customer will be booked into all sessions of the series' for School Holiday Programmes if a customer is to book in for the whole week

- *Payment* - update if you want your customers to add their direct debit details at the time of booking
- *Show in progress* - update if you do not want this course to be viewed in the portal such as an assessment or school holiday programme
- *Allow online waiting list add* - decide whether you want your customers to be able to add themselves to the waiting list if their preferred class is full
- Add Bookings allowed in days and hours, only update here if you want to override the general information under Customer Account Settings
- Add the minimum and maximum age for the bookings
- Enter a description if you want it displayed in online bookings in the customer portal



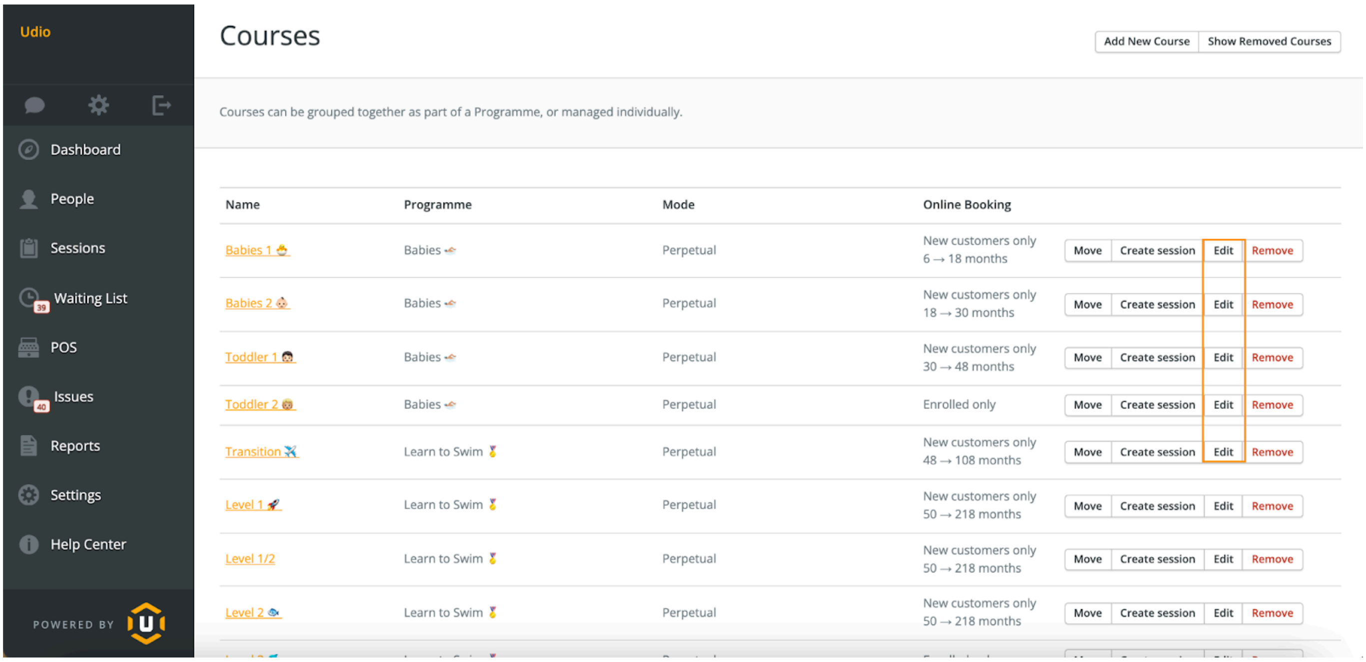
2.2.3 Details

- Choose the colour for this course which will be displayed in the sessions and calendar
- Upload your logo or course icon if you have one - this will be used in the portal under *'Progress'*
- Enter *'General course information (staff)'* to display on the sessions page under course information on the right-hand side of the page
- Enter *'General course information (customers)'* which will be displayed in the portal; you can also include links to YouTube or Vimeo
- Click *'Confirm'*
- Navigate back to the settings page and select '*Configure courses*' again - you should now see it in the list of courses
- Repeat this for each course



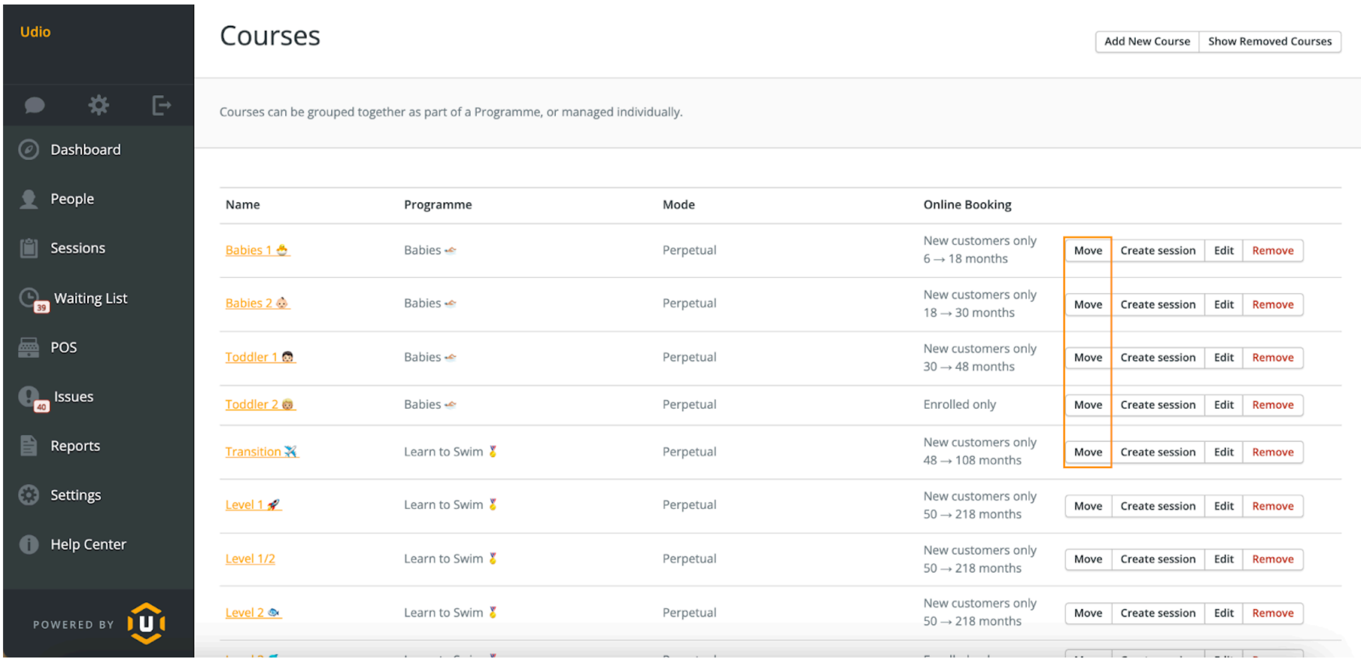
2.2.4 Edit an existing course

- Click *'Edit'* next to the course you want to edit
- Make the necessary changes
- Click *'Confirm'*



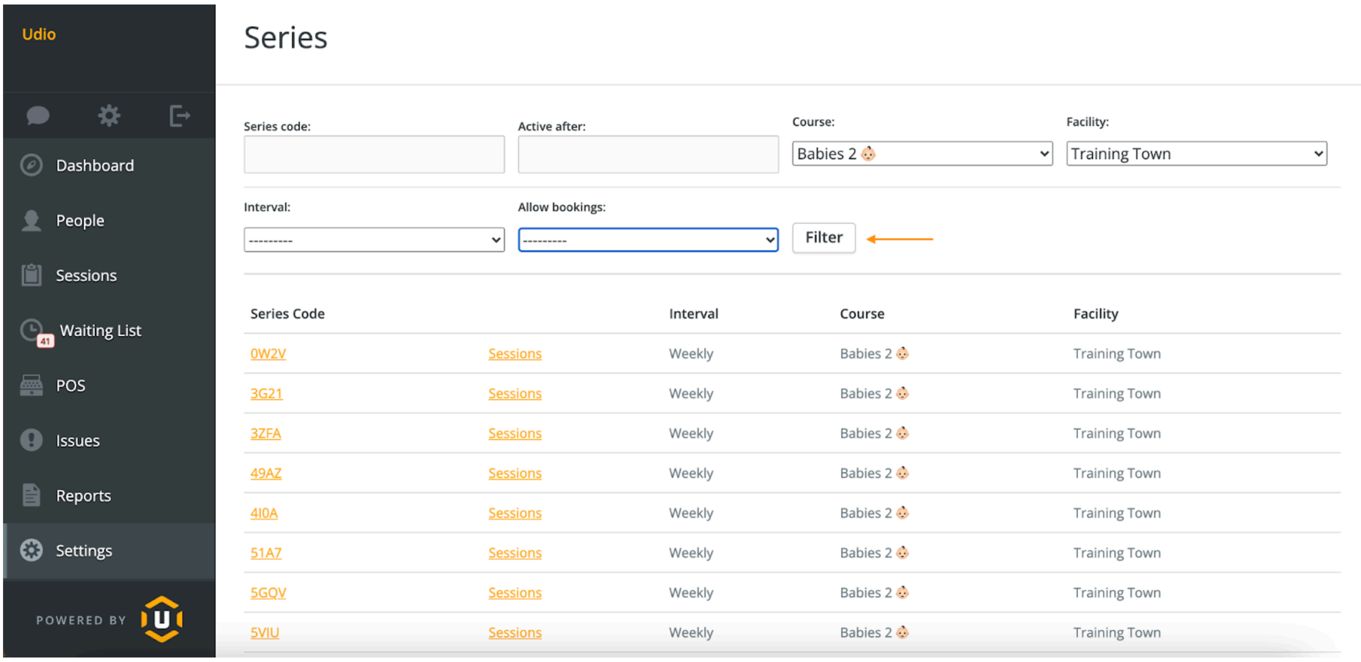
2.2.5 Moving a course

- Click and hold on the *'Move'* button
- Move the course to where you want it to be



2.3 Configure series

Here you'll find all created series and have multiple search options including *'allow bookings.'*



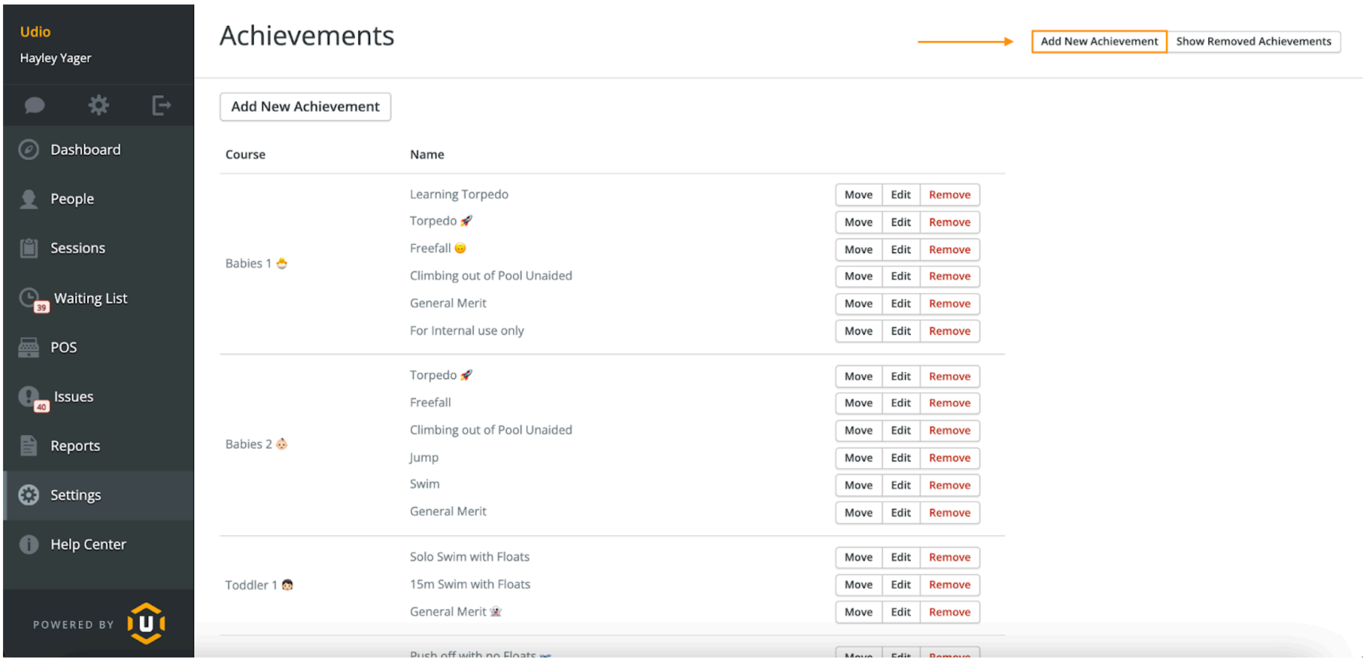
2.4 Configure achievements

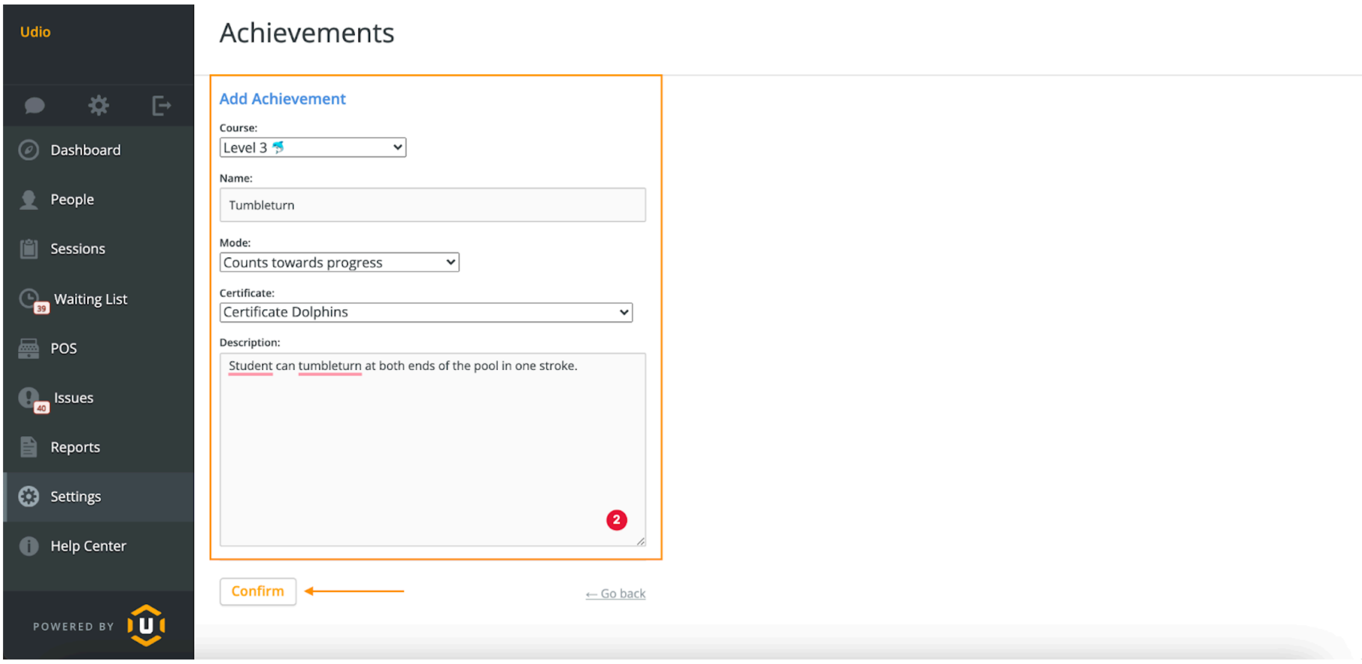
Achievements are milestones within a course and are awarded once a student has reached a certain goal.

2.4.1 Adding achievements

- Click on '*Configure achievements*' and select '*Add New Achievement*' or *'Add Multiple Achievements'*
- Select the relevant course and name the achievement/s

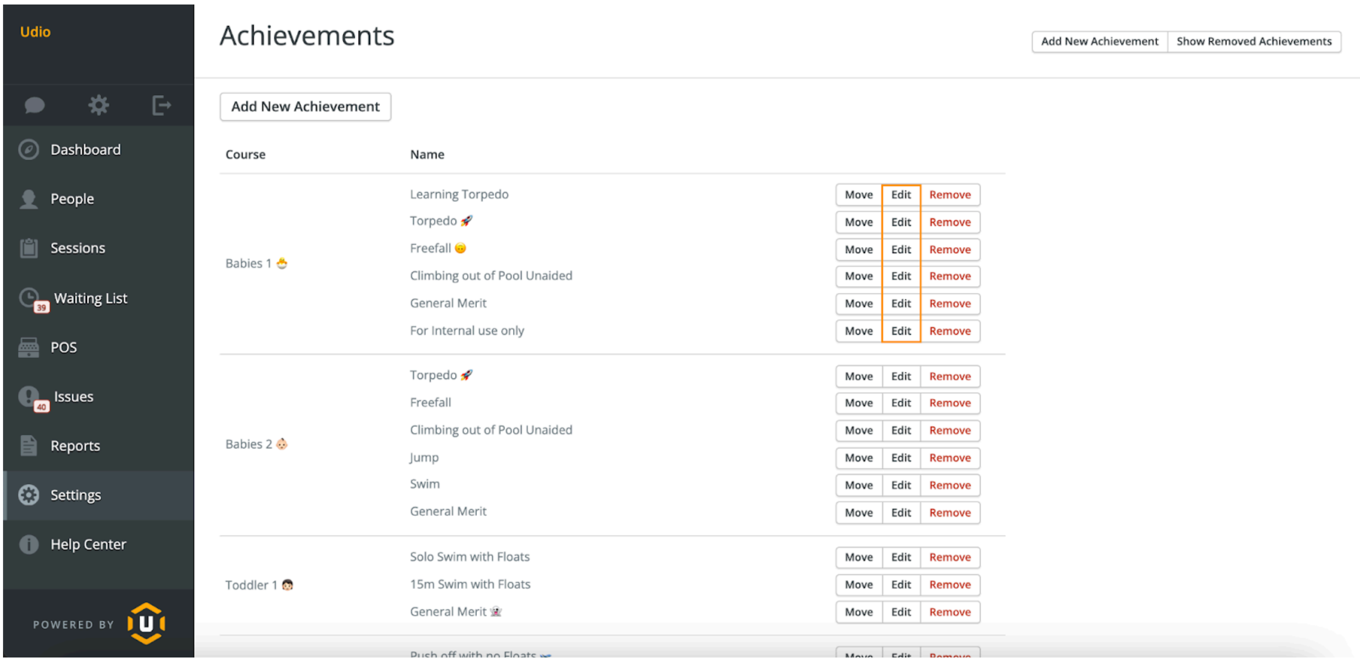
- Select whether this achievement counts towards progress (generally, school holiday programmes don't count towards progress)
- Choose the certificate from the dropdown box (you can set these up under *'certificates'*)
- Add a description if required (this will show in the customer portal)
- Click *'Confirm'*





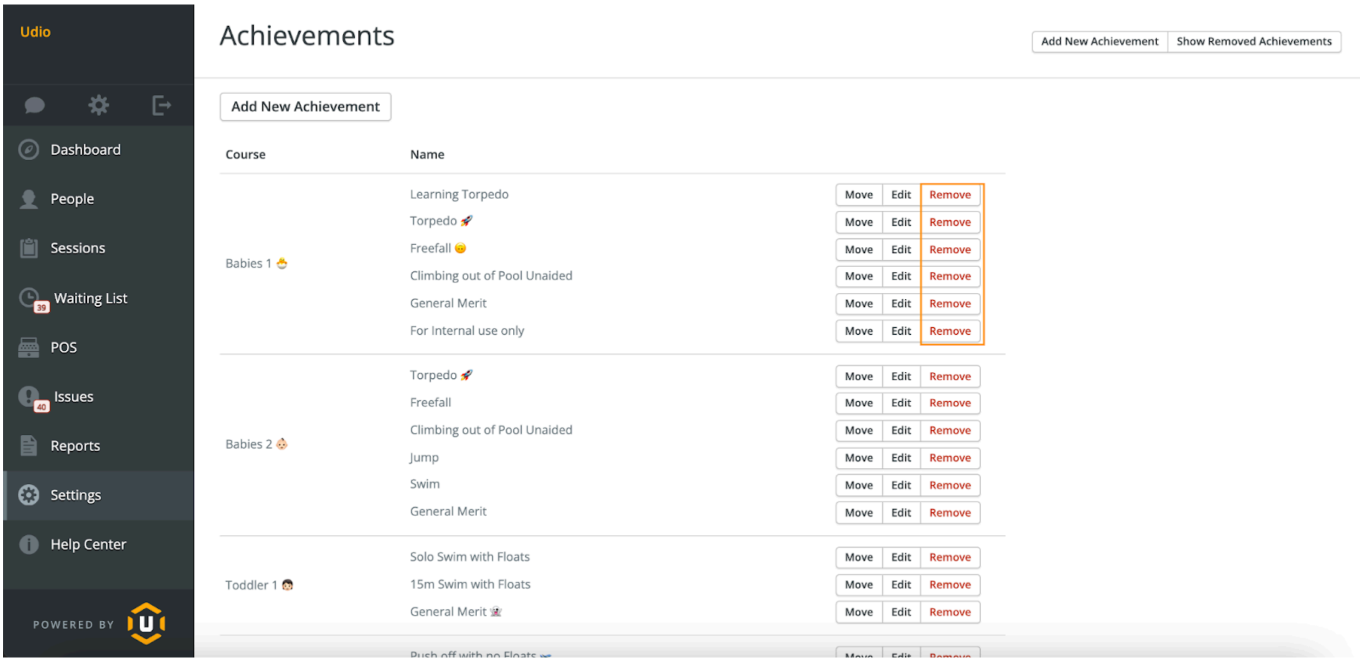
2.4.2 Editing achievements

- Click *'Edit'* next to the achievement you wish to edit
- Make the necessary changes and click *'Confirm'*



2.4.3 Deleting achievements

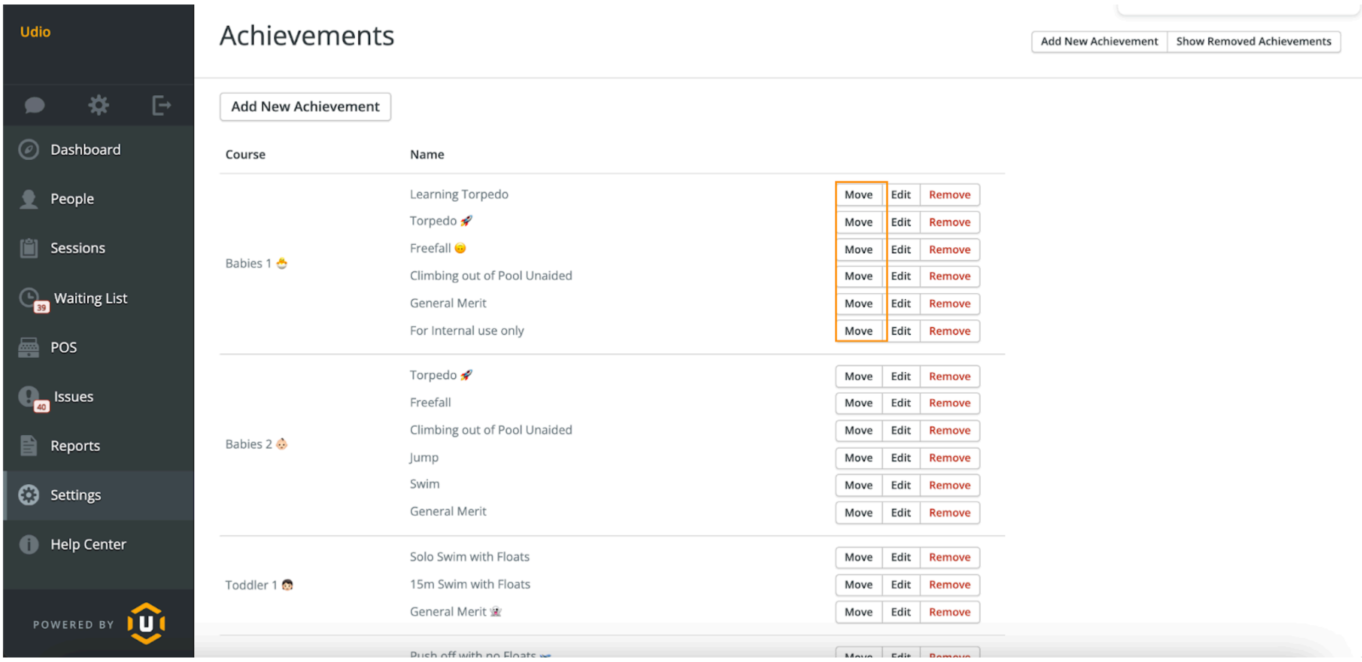
- Click the *'Remove'* button next to the achievement you wish to delete
- Click *'Confirm'*



2.4.4 Moving achievements

You can move your achievements around within the course should they be out of position or if you add new achievements into your programme

- Click and hold the *'Move'* button and drag to the correct position



2.5 Certificates

Your customers can view their child's progress through the customer portal - you can use your own course icons and certificates if you have them, otherwise, Udio has generic ones that you can use. There are a few steps to set this part of the system up:

Achievements and Course Completions

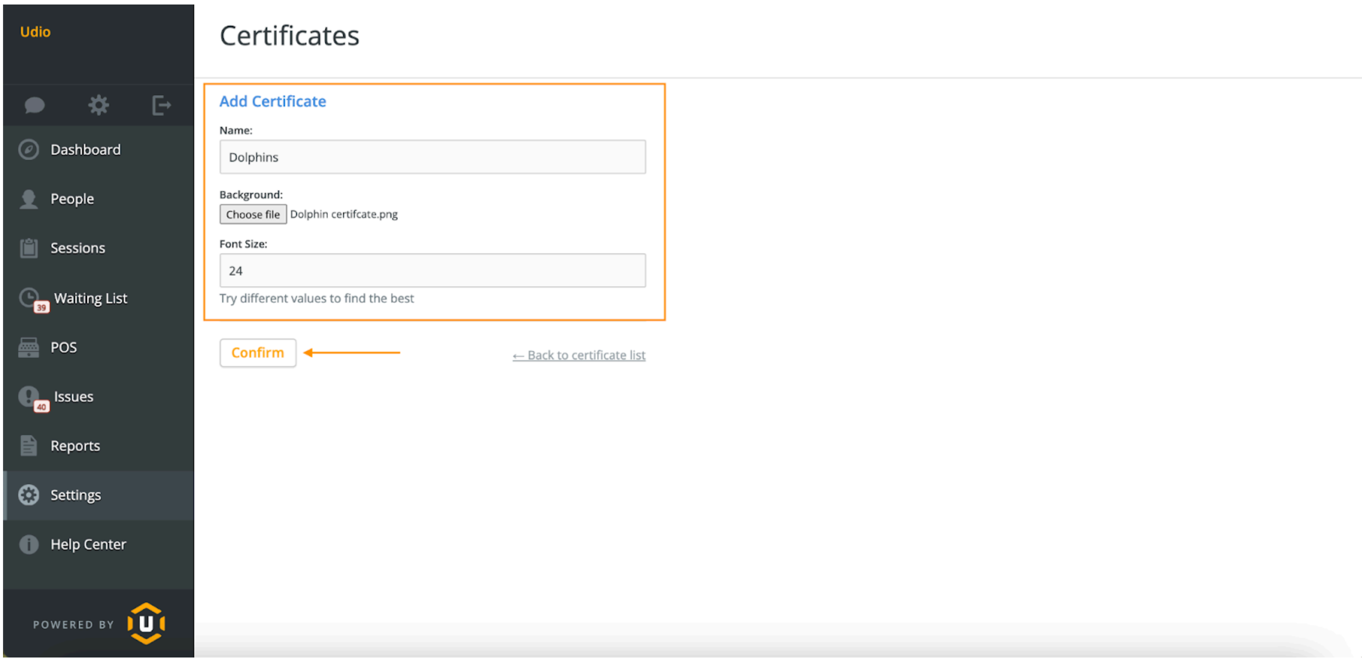
If your certificates require a signature, you can insert your school name in a text box and move it to the signature area on a PDF. We use SignPainter font for the signature.

Convert all PDFs to PNG format with pixels of 180.

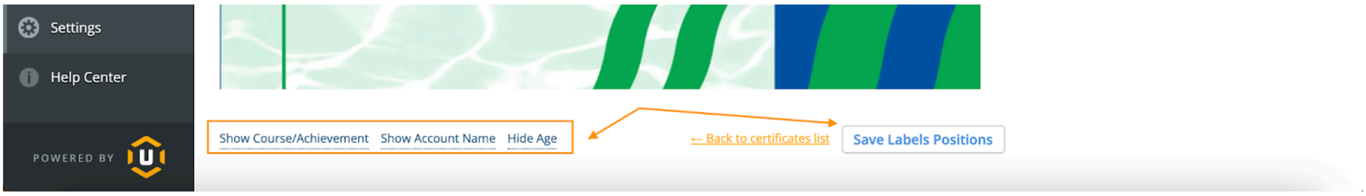
- Go to 'Settings' in Udio
- Under *'Users'* go to *'Configure login permission groups'*
- Choose your group, select <u>all</u> and click *'Confirm'*

To add certificates for both achievements and course completions:

- Go back to *Courses & Programmes* in Settings and click *'Certificates'*
- Click *'Add New Certificate'*
- Add the certificate name
- Choose the file (achievement or course completion) which must be a PNG file if you are using your own certificates
- Change the font size if required
- Click *'Confirm'*

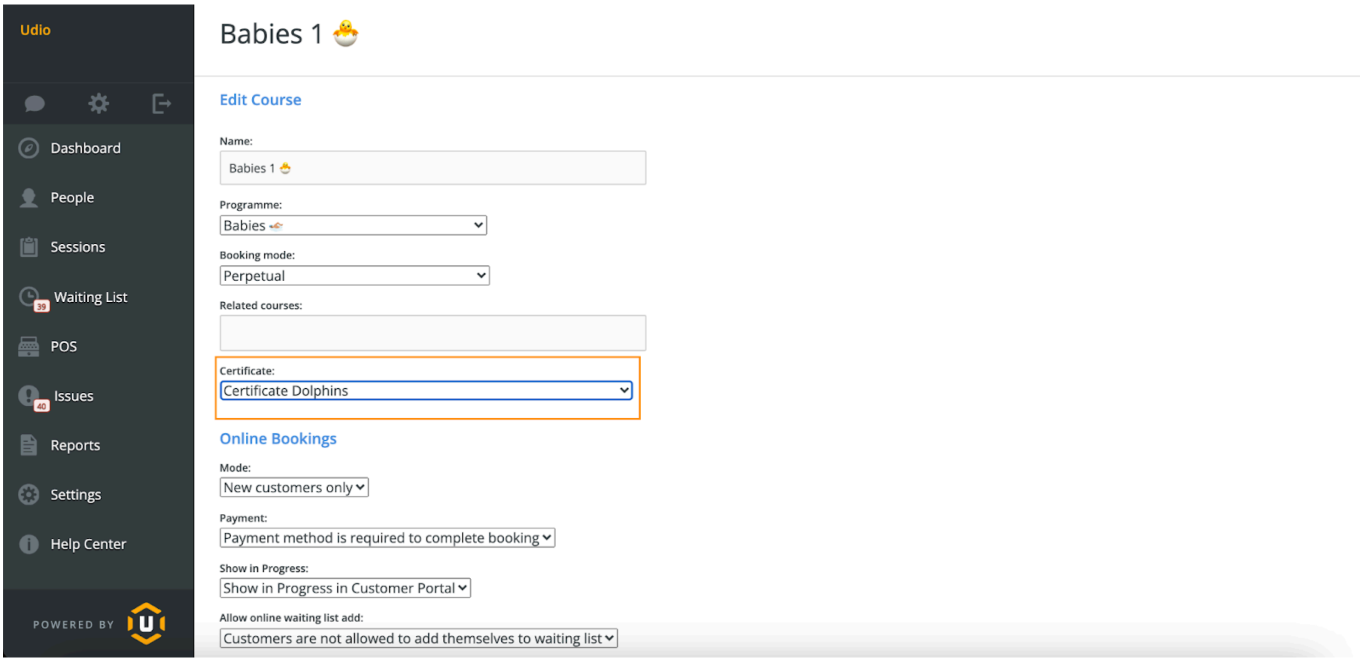


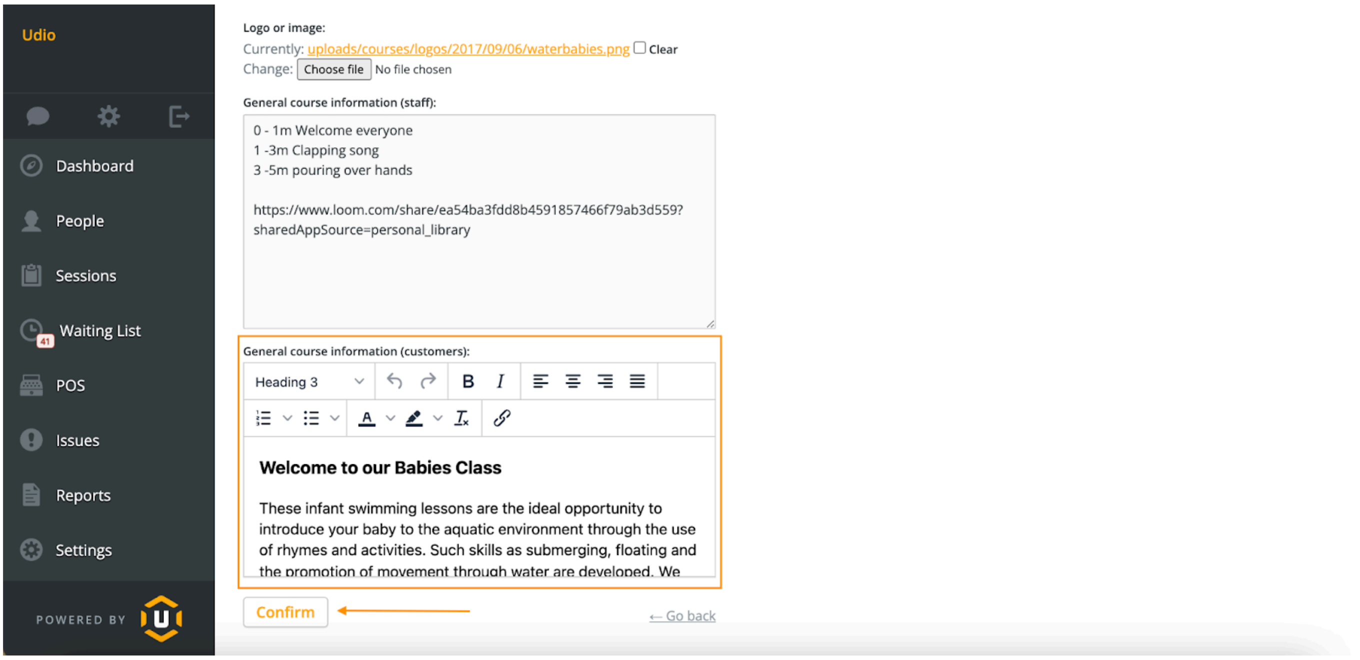
You can then position labels depending on your certificate. Scroll to the bottom of the page to hide or show different labels. If you're using the generic certificates, these labels should populate in the correct positions. Hit *'Save Labels Positions'* when done and repeat for all achievements and course completions that you have.



For course completion, you will need to update the information in courses:

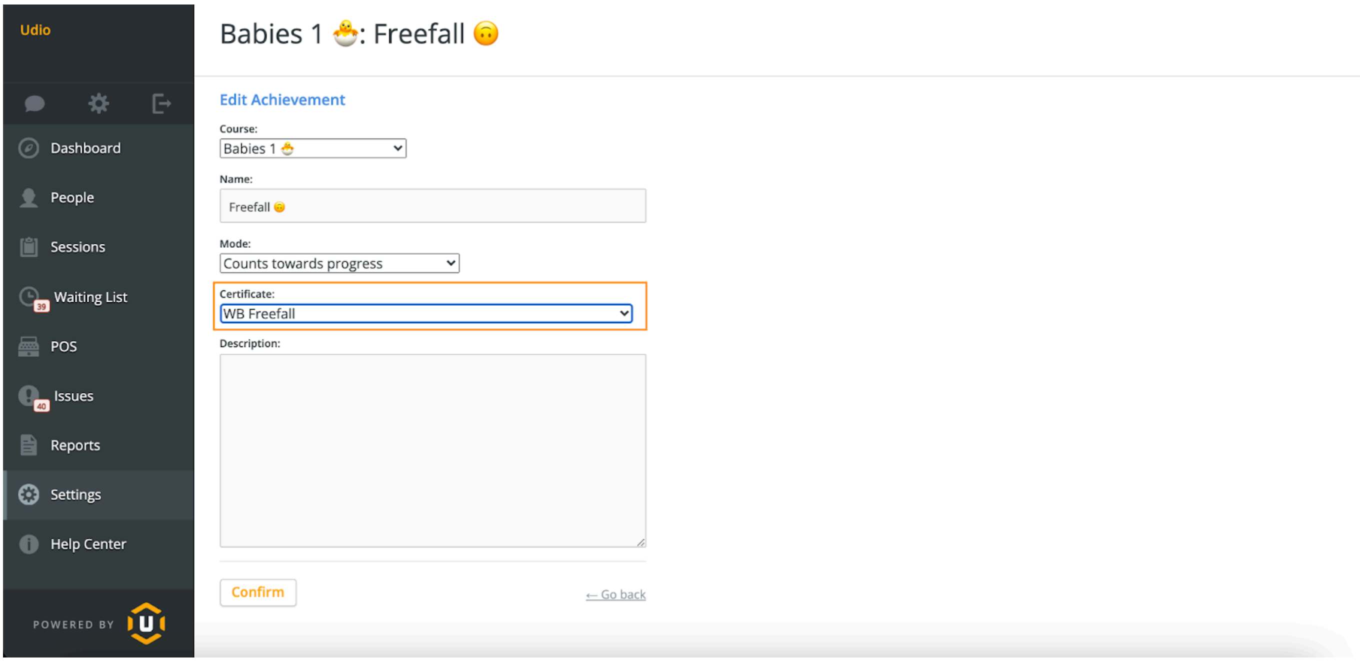
- Under *Courses & Programmes* in settings, click *'Configure courses'*
- Choose the first course and click *'Edit'*
- Click on the dropdown box for *Certificate* and choose the appropriate course completion
- Select *'Show in Progress*' unless it's a school holiday programme which you can hide if you don't want it to appear on the progression page
- Upload your course icon if you have one
- Under *'General course information (customers)'*, you can introduce the course, add learning objectives and add a YouTube link if you have a video for parents/students to watch and refer back to
- Click *'Confirm'*
- Repeat for all course completions





For achievements, you will need to update the information elsewhere:

- Under *Courses & Programmes* in settings, click '*Configure achievements*'
- Choose the first course and click *'Edit'*
- Choose whether it counts towards progress (for example, if you give out a general merit, you wouldn't count this towards progress)
- Under *Certificate*, choose the achievement from the list
- Click '*Confirm'* and repeat for all achievements



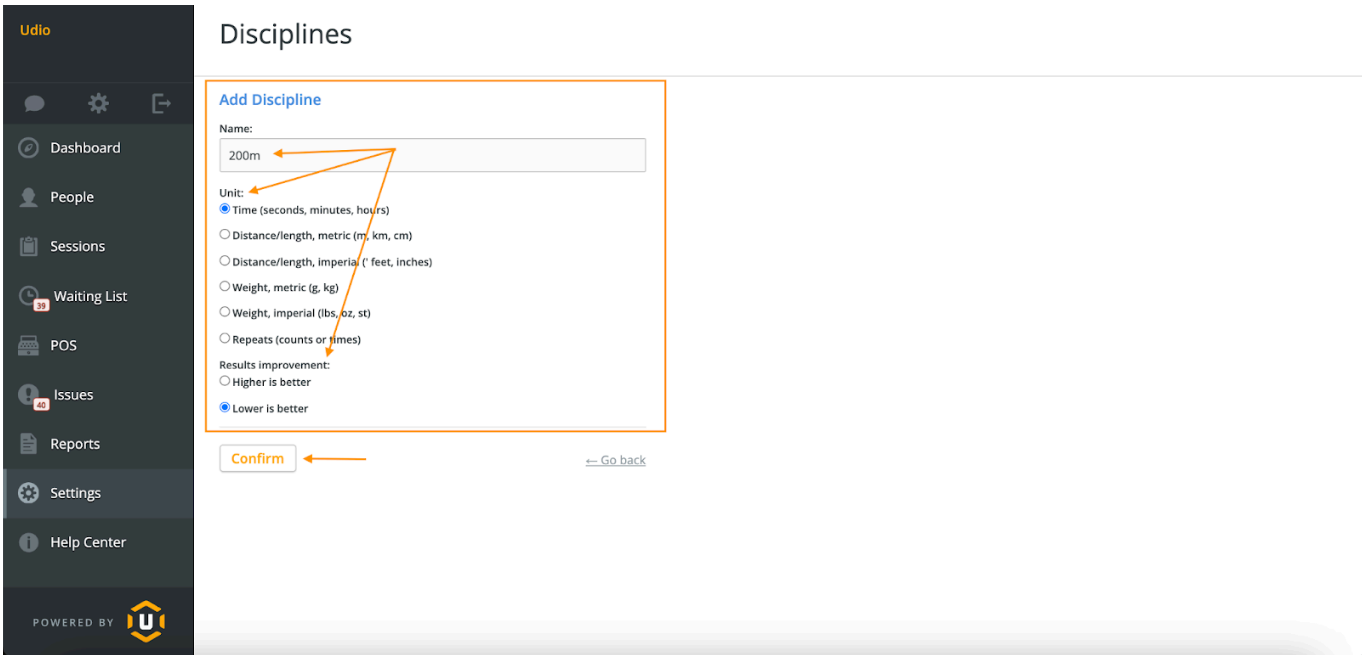
Your customers can now view their child's current and previous progress provided the achievements and course completions have been entered for that person.

2.6 Personal results disciplines

Udio has created a way for your business to enter disciplines and track results for your students. Within the portal, they can then view their progress, including their PB count, current PB times and all times for each discipline.

Ensure that you have updated your permissions groups to view these settings and then go to settings:

- Under *Courses & Programmes*, select *'Personal Results Disciplines'*
- Click *'Add New Discipline'*
- Enter the name
- Tick the unit and results improvement
- Click *'Confirm'*
- Repeat for all disciplines

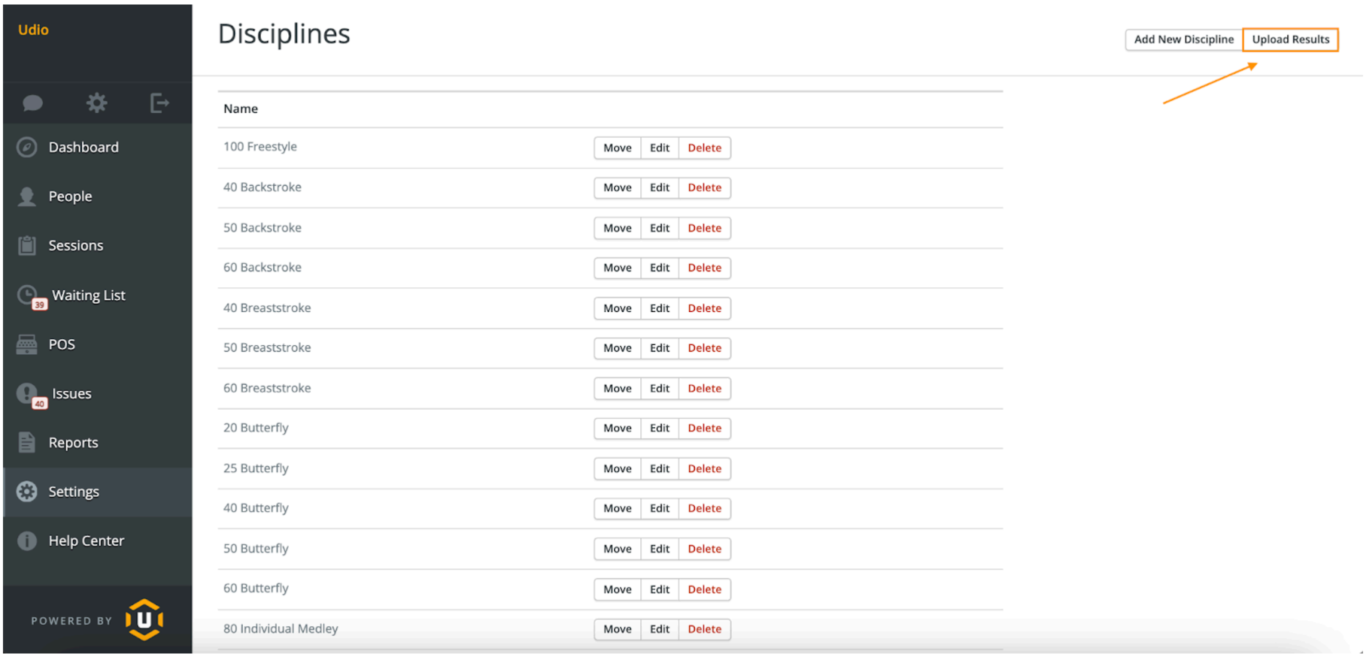


Once created you can reorder disciplines by holding and dragging the *move* button - the list will show in this order in the portal for the customer to view.

2.6.1 Uploading results

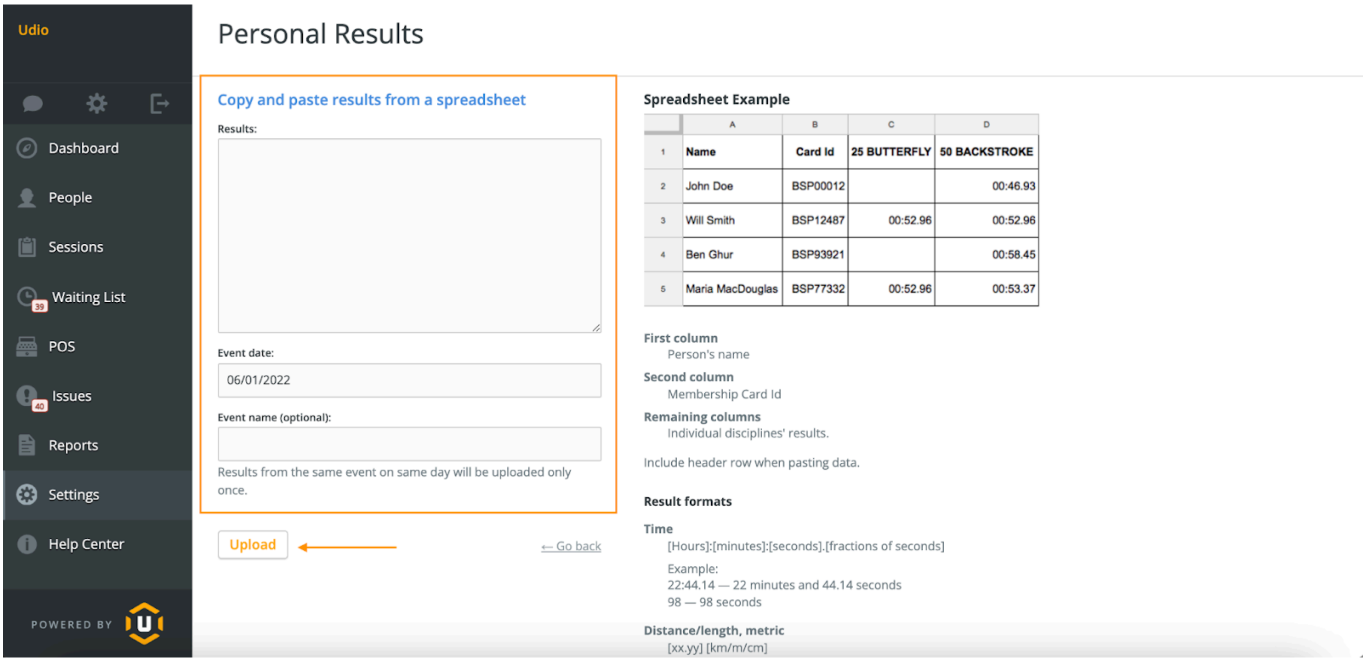
There are two ways to upload results - you can copy from a spreadsheet or via the people page. To copy from a spreadsheet:

- Go to *Courses & Programmes* under settings and select *'Personal Results Disciplines'*
- Click '*Upload Results'* and use the example spreadsheet on the right-hand side as a guide



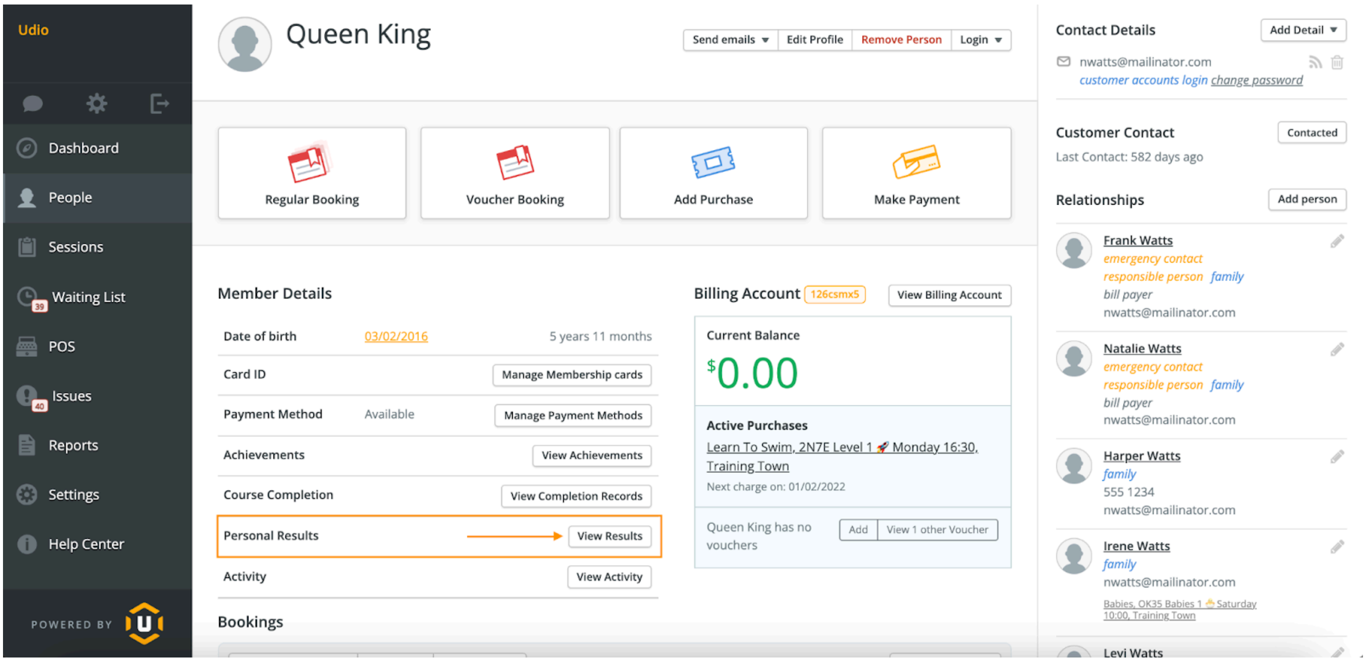
- Once you've completed the spreadsheet in the same format as the example, copy the data and paste it into the *Results* panel
- Update the *Event date* and *Event name* if required
- Click *'Upload'*

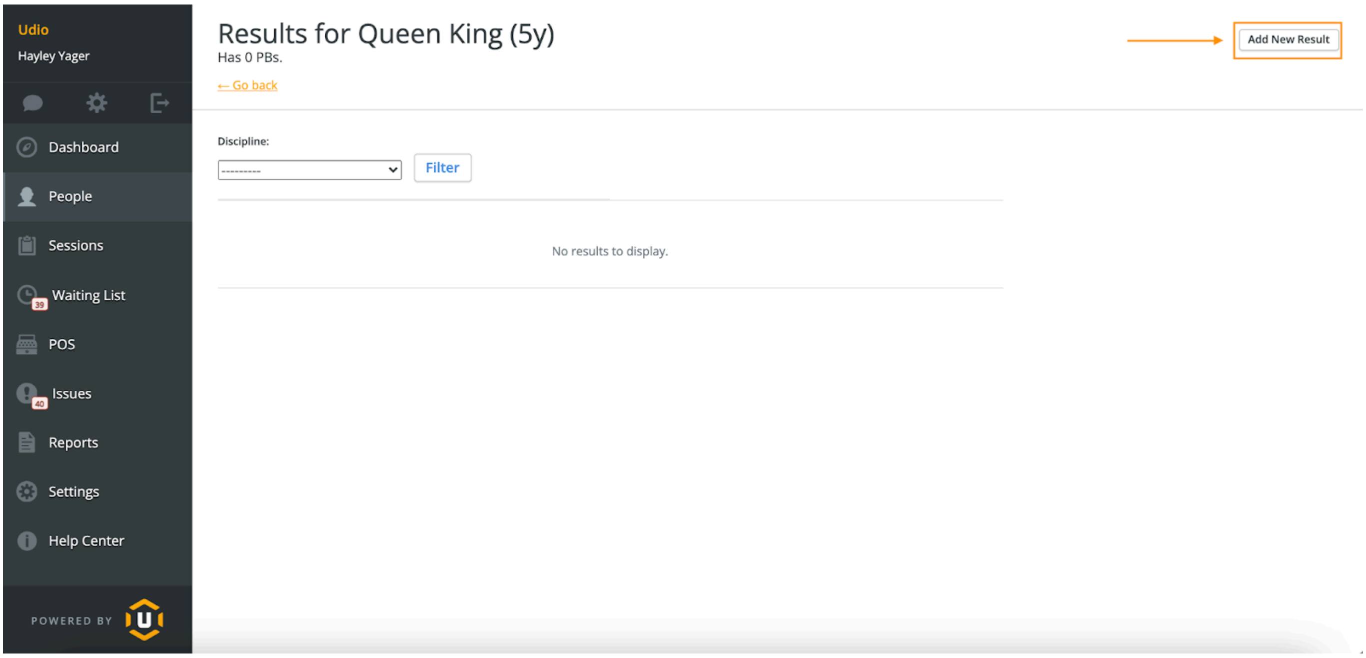
- Udio will display any errors including the row number of the error; once fixed, copy and paste the whole spreadsheet and click '*Upload*' again

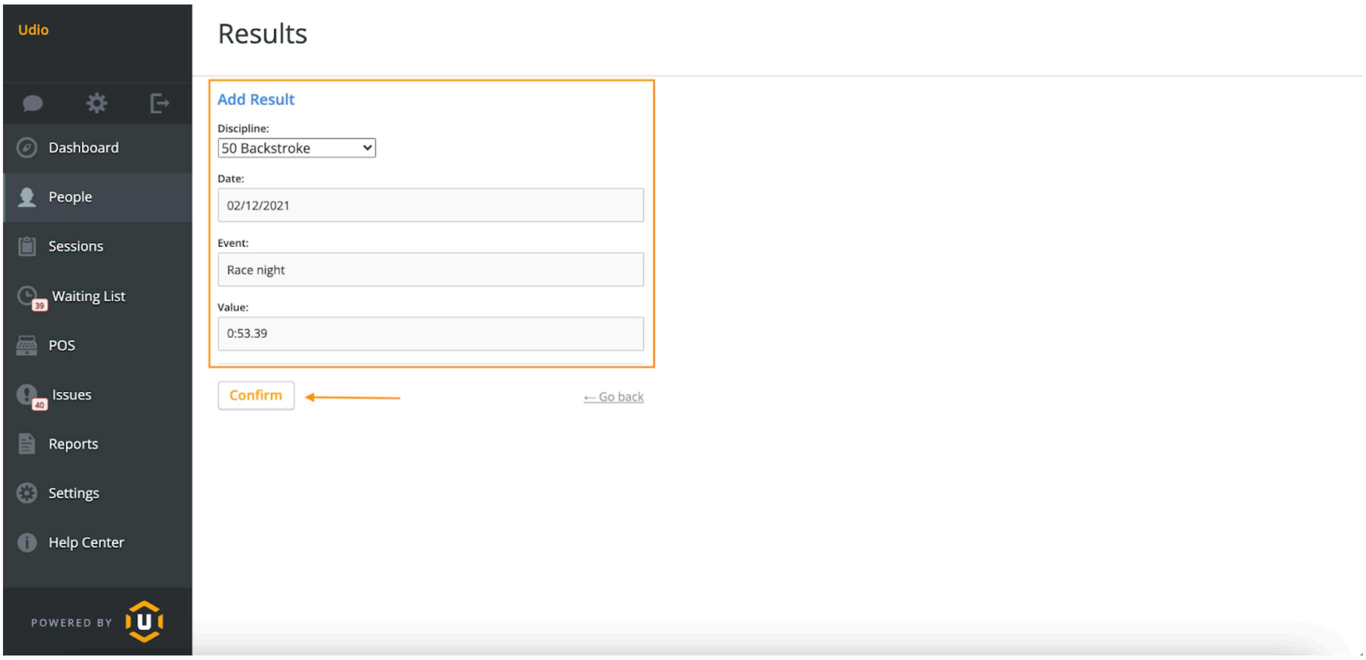


You can also add results from the person's '*People*' page:

- Under *Member Details,* scroll down to *Personal Results* and click *'View Results'*
- Click *'Add New Result'* in the top right corner
- Select the discipline from the dropdown box
- Update the date and the event
- Enter the value in the format displayed on the personal results disciplines screen
- The times will show on this page as well as the number of PBs and which are current PBs



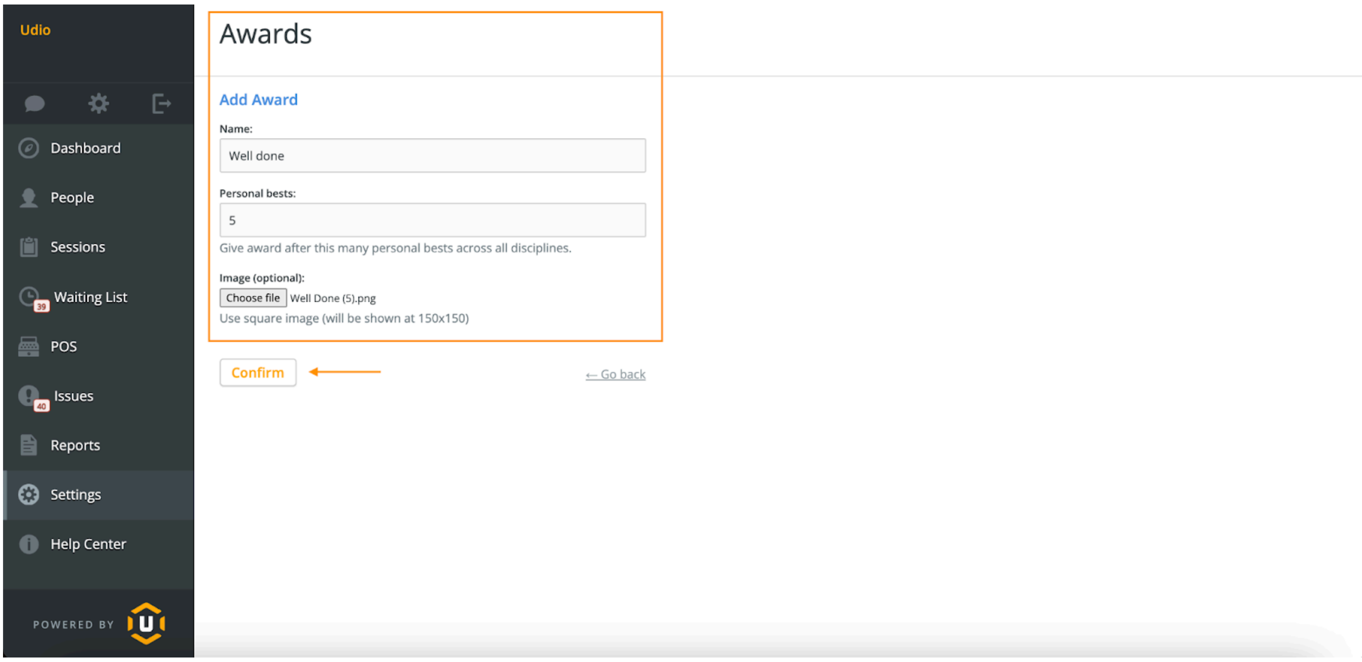




2.7 Personal results awards

If you have PBs or milestones that you wish to celebrate and view in the portal/reports, add in here:

- Under *Courses & Programmes*, select *'Personal Results Awards*
- Click *'Add New'*
- Add the name of the award
- Choose the number of personal bests that the student needs to achieve before receiving this award (e.g. 5, 10, 20, etc.)
- Upload an image if you have one which will be displayed in the portal
- Click *'Confirm'*
- Repeat for all personal awards



3. Financial Settings

3.1 Packages & Purchasing

This setting refers to how your customers will pay for the services they receive. Will they be paying weekly, fortnightly, monthly, casually, by the term or with a voucher?

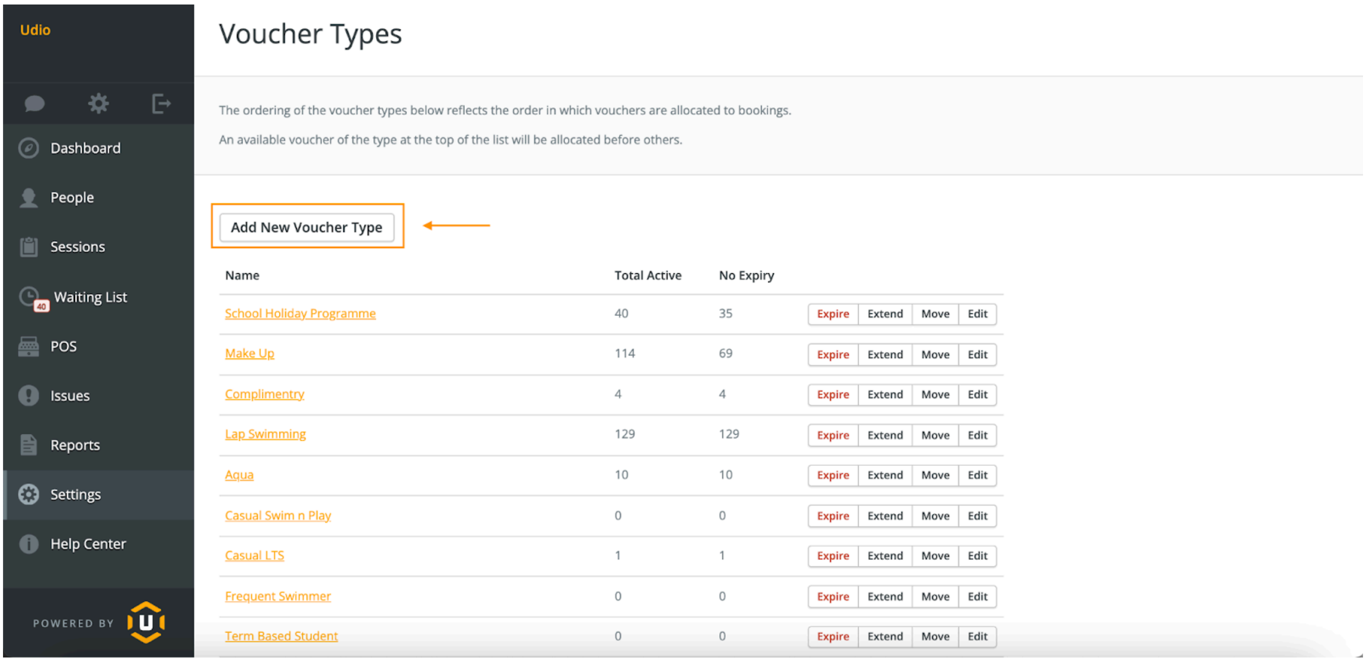
3.1.1 Configure voucher types

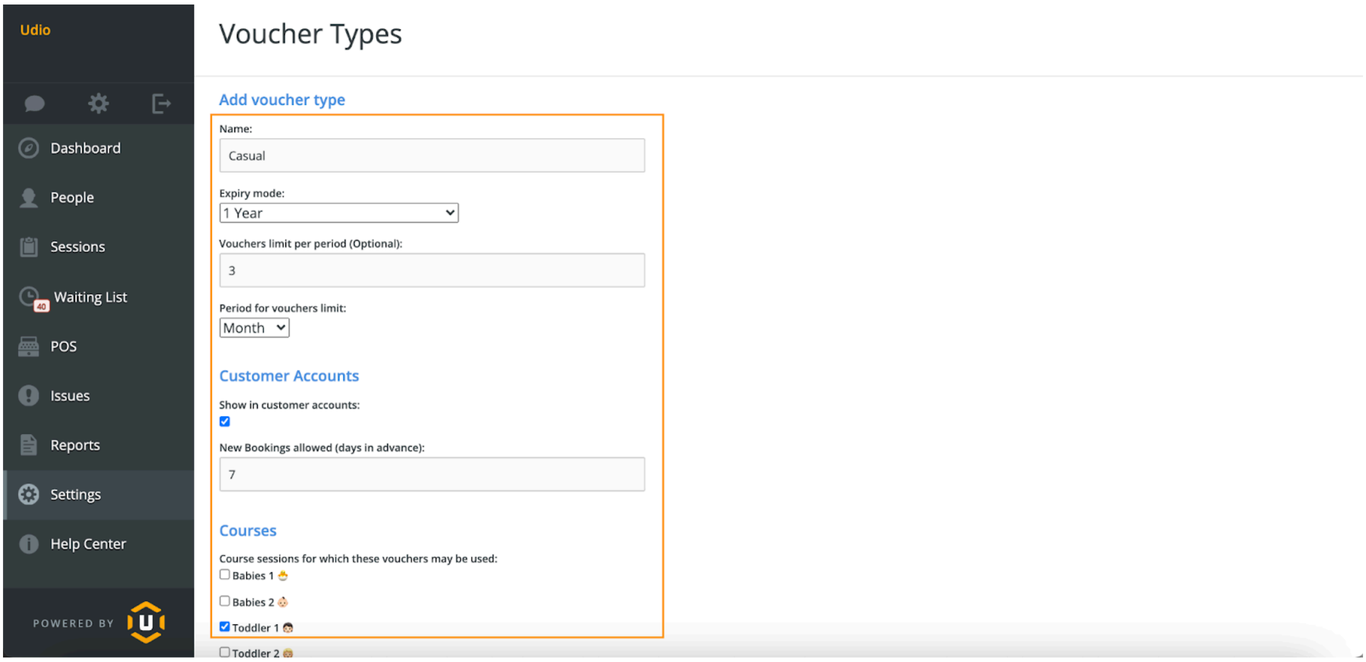
Many businesses offer vouchers of some description, that allow customers to attend lessons such as a make up, casual, public use or school holiday programme. You can view the active voucher count under *'total active'* and *'no expiry.'*

You likely want to have separate voucher types:

3.1.1.1 Adding a new voucher type

- Under *'Configure voucher types'* select *'Add New Voucher Type'*
- Add the name, expiry mode, voucher limit per period (if needed) and period for vouchers limit (such as month, quarter, year or term)
- Tick if you want the information to show in the customer portal
- Add the number of days in advance for a new booking (this restricts what the customer can do in customer accounts)
- Select the courses this voucher type applies to
- Click *'Confirm'*

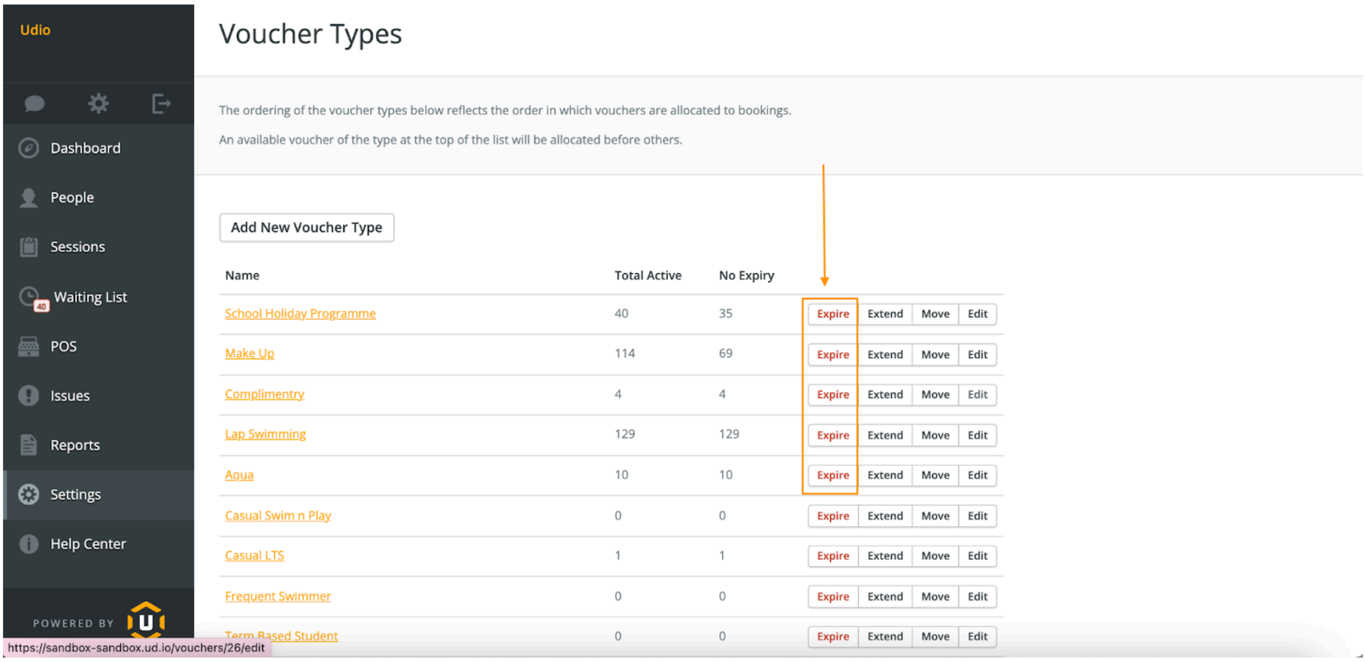


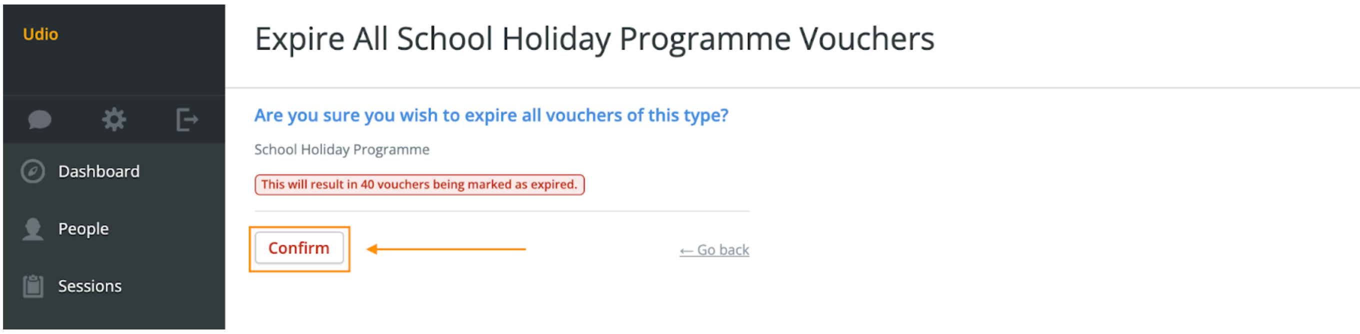


3.1.1.2 Delete/expire vouchers

- Click on *'Expire'* next to the voucher which you wish to delete
- Confirm the expiry of all vouchers

If you have multiple facilities, the extension will apply to all facilities.

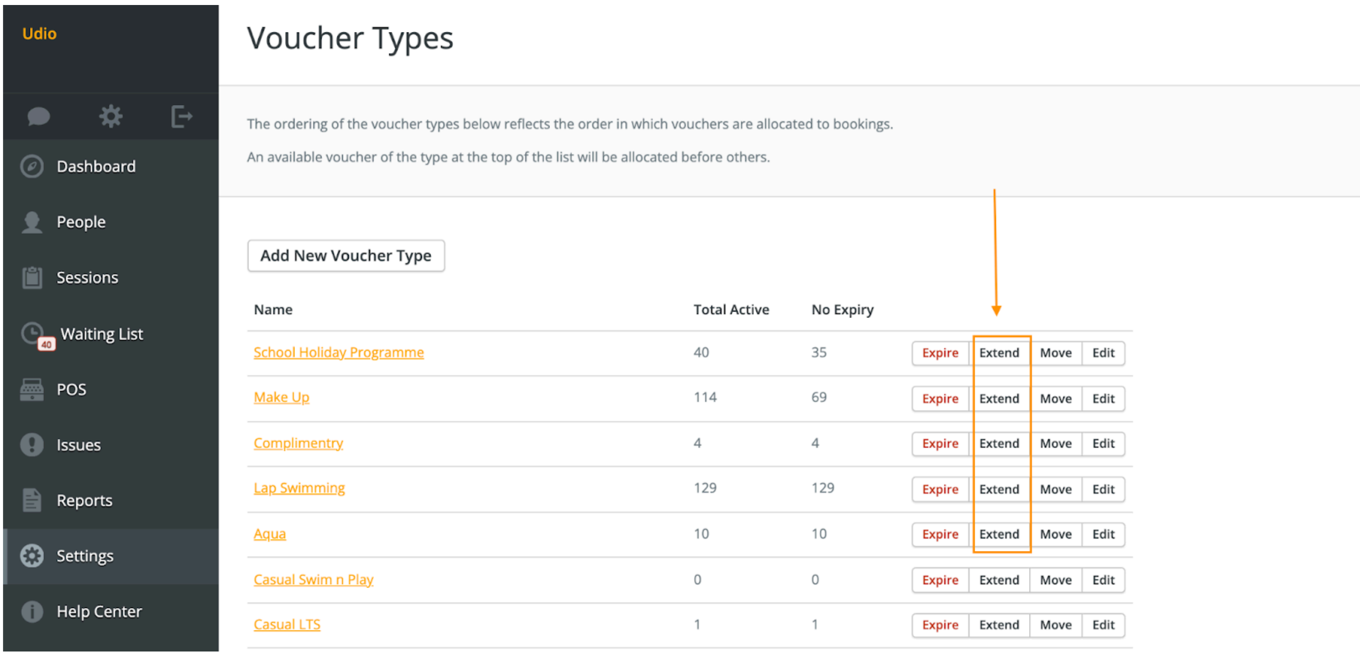


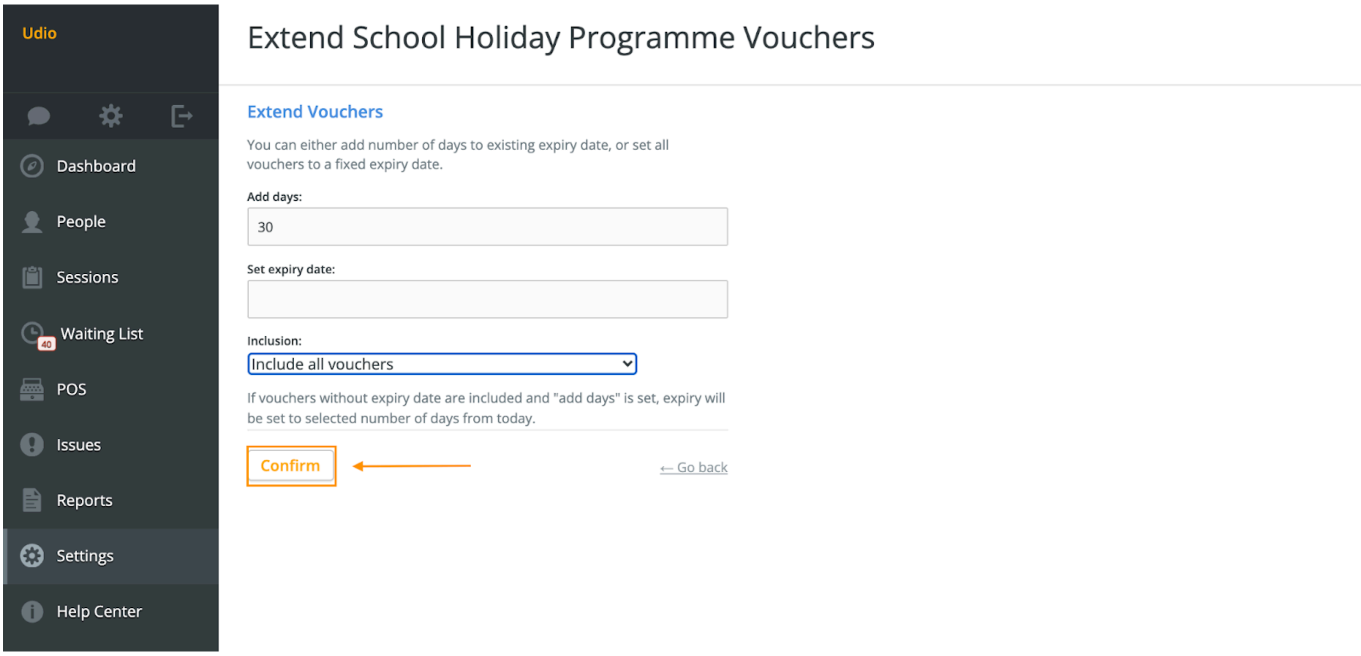


3.1.1.3 Extend vouchers

- Click on *'Extend'*
- Add the number of days <u>or</u> set an expiry date
- Select your inclusion from the drop-down menu
- Click *'Confirm'*

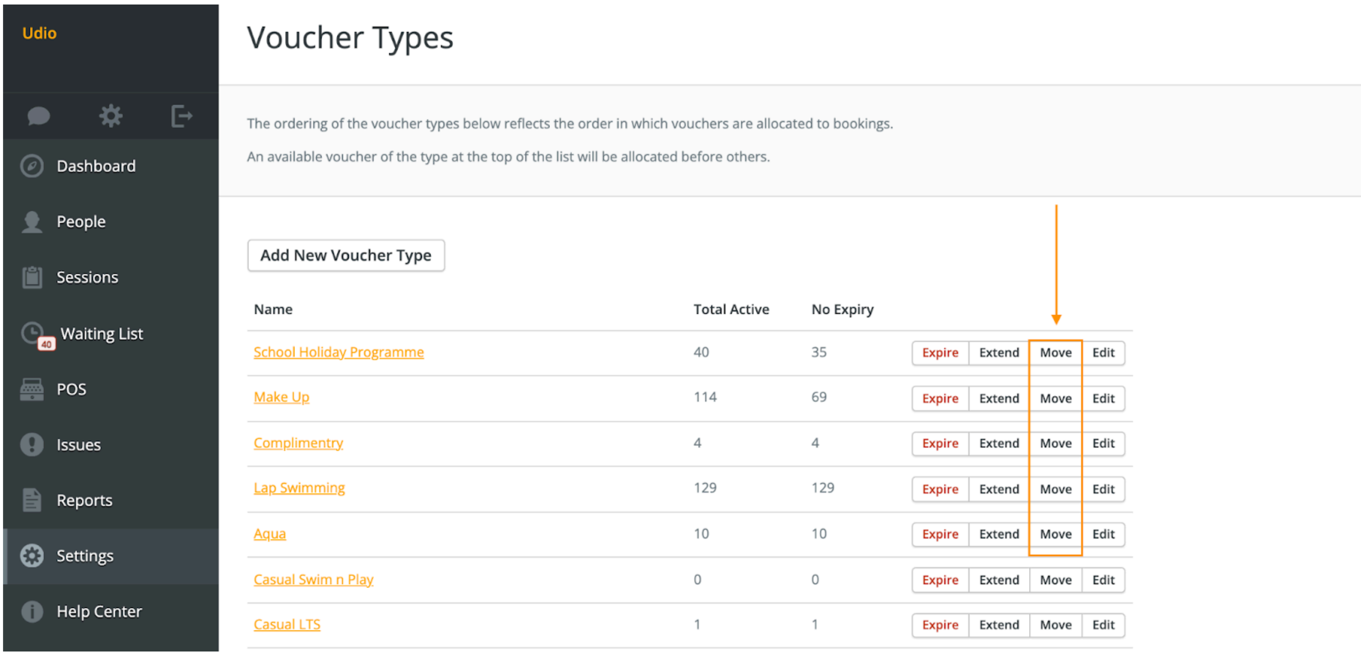
If you have multiple facilities, the extension will apply to all facilities





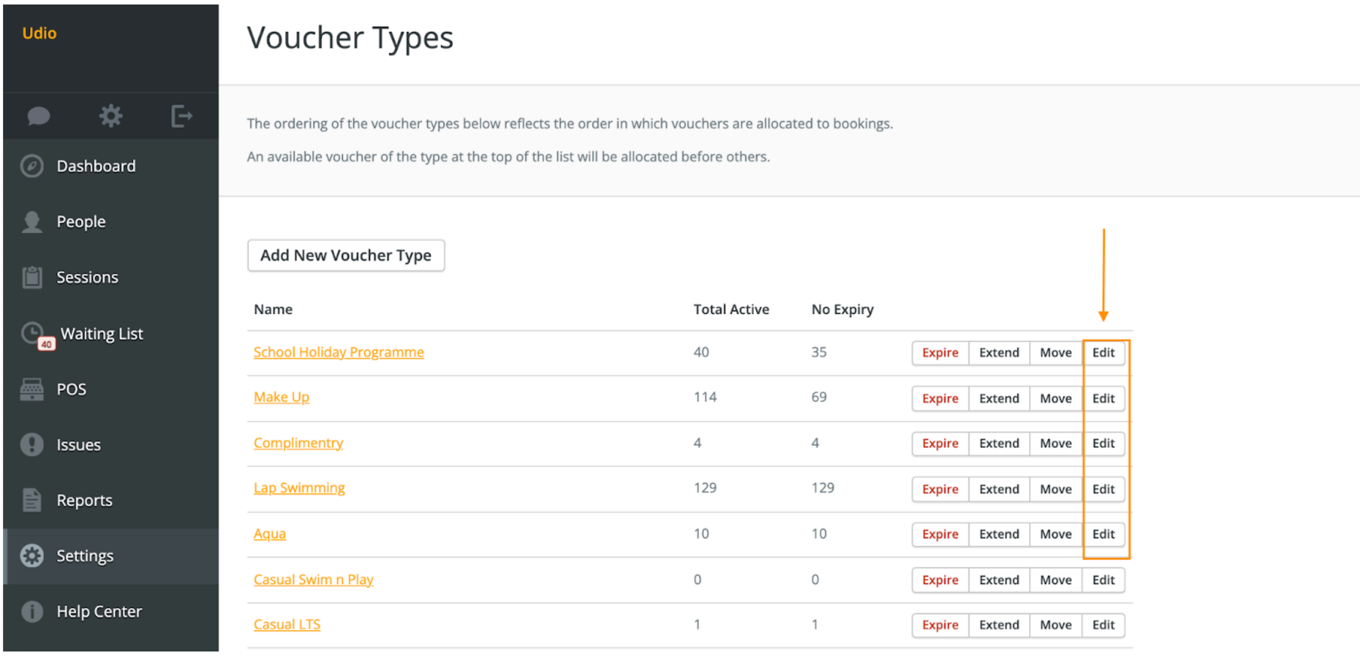
3.1.1.4 Move a voucher type

- Click and hold the *'Move'* button
- Move the voucher type to where you want it to be



3.1.1.5 Edit a voucher type

- Click on the *'Edit'* button and make changes
- Click *'Confirm'*

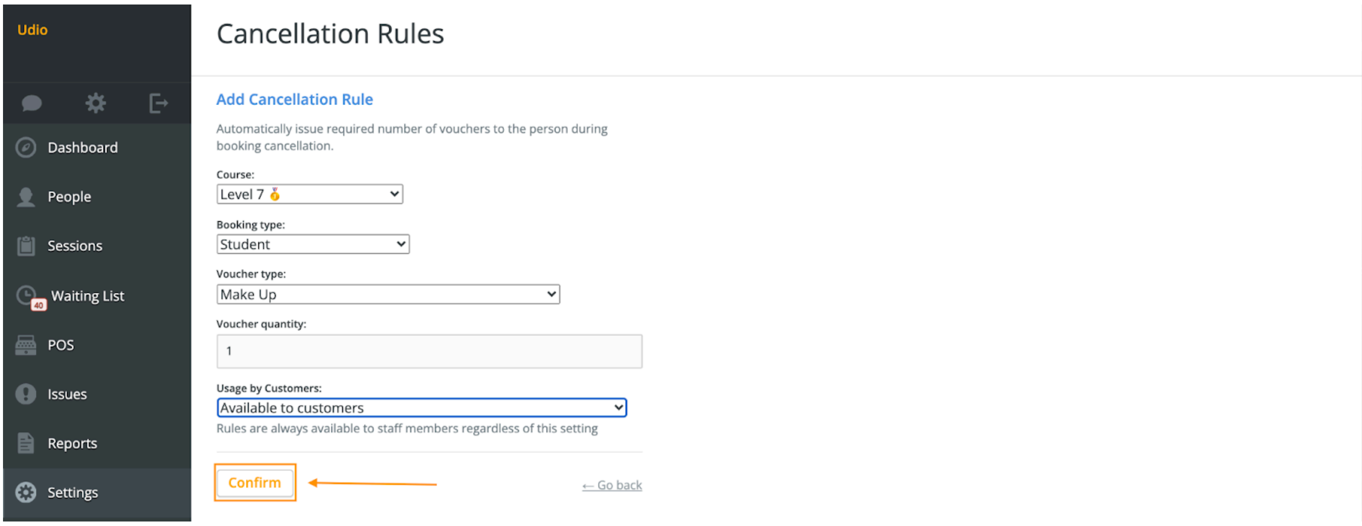


3.1.2 Configure cancellation rules

There will be times when customers need to cancel a lesson. This section details the rules your business has with regard to a customer cancelling a booking via the portal (for example, you may choose to issue a make up voucher).

3.1.2.1 Add a new cancellation rule

- Click on *'Configure cancellation rules'* and select *'Add New Cancellation Rule'*
- Add information for the course, booking type, voucher type, voucher quantity and usage by customers (this lets you decide if a customer can cancel a lesson)
- Click *'Confirm'*
- Repeat for all courses

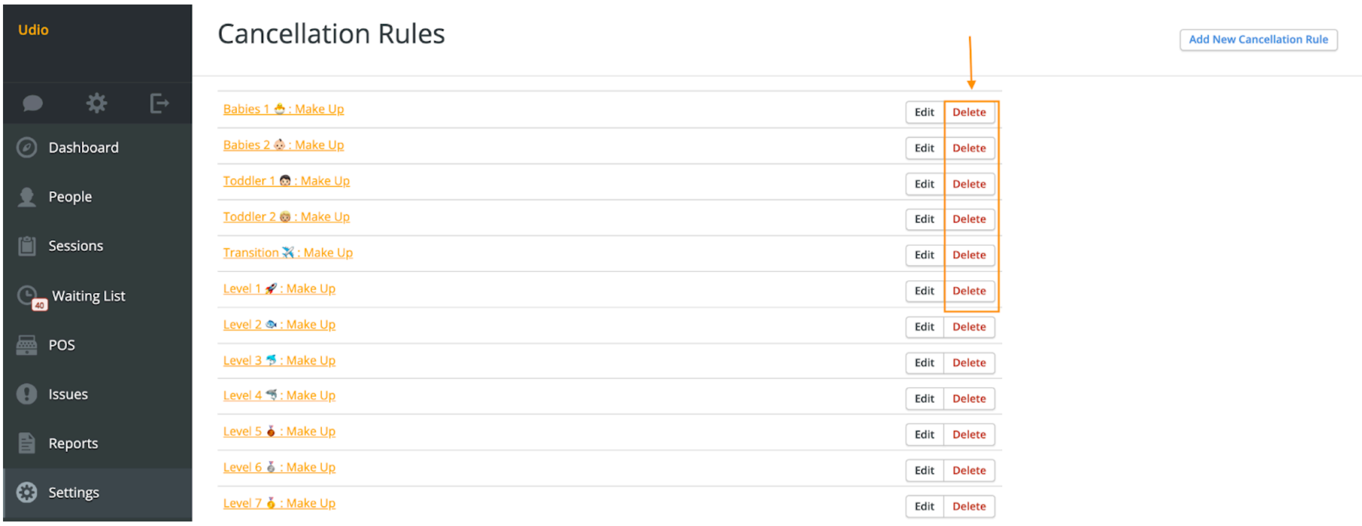


3.1.2.2 Edit a cancellation rule

- Click on the *'Edit'* button next to the cancellation rule you wish to edit
- Make the changes and click *'Confirm'*

3.1.2.3 Delete a cancellation rule

- Click the *'Delete'* button next to the cancellation rule you wish to delete
- Click *'Confirm'*

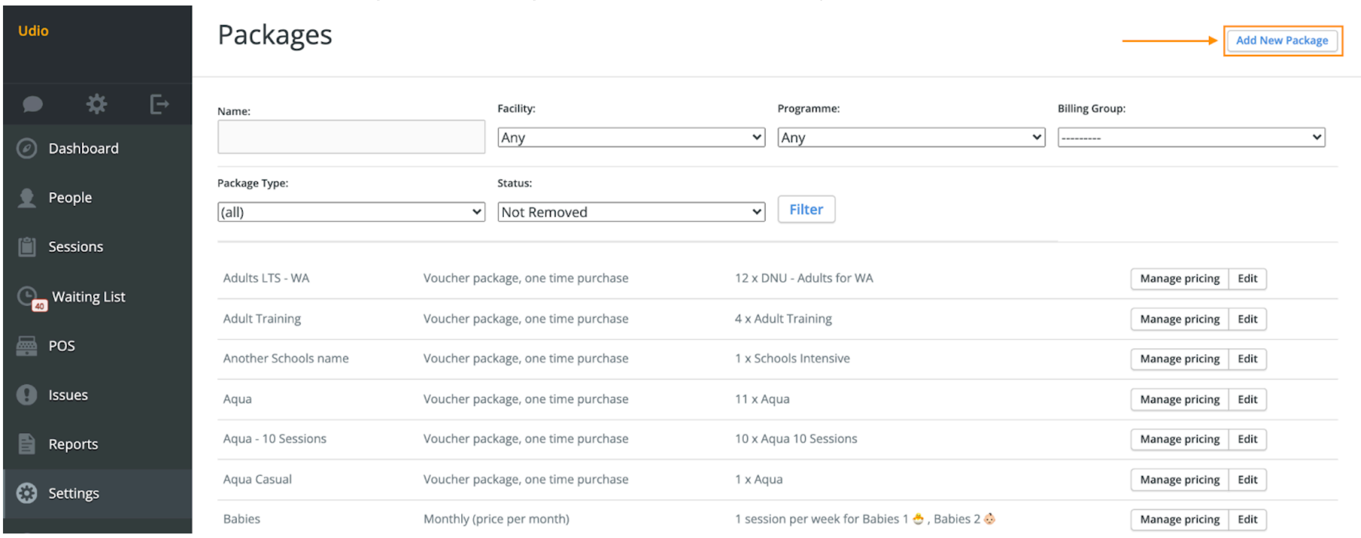


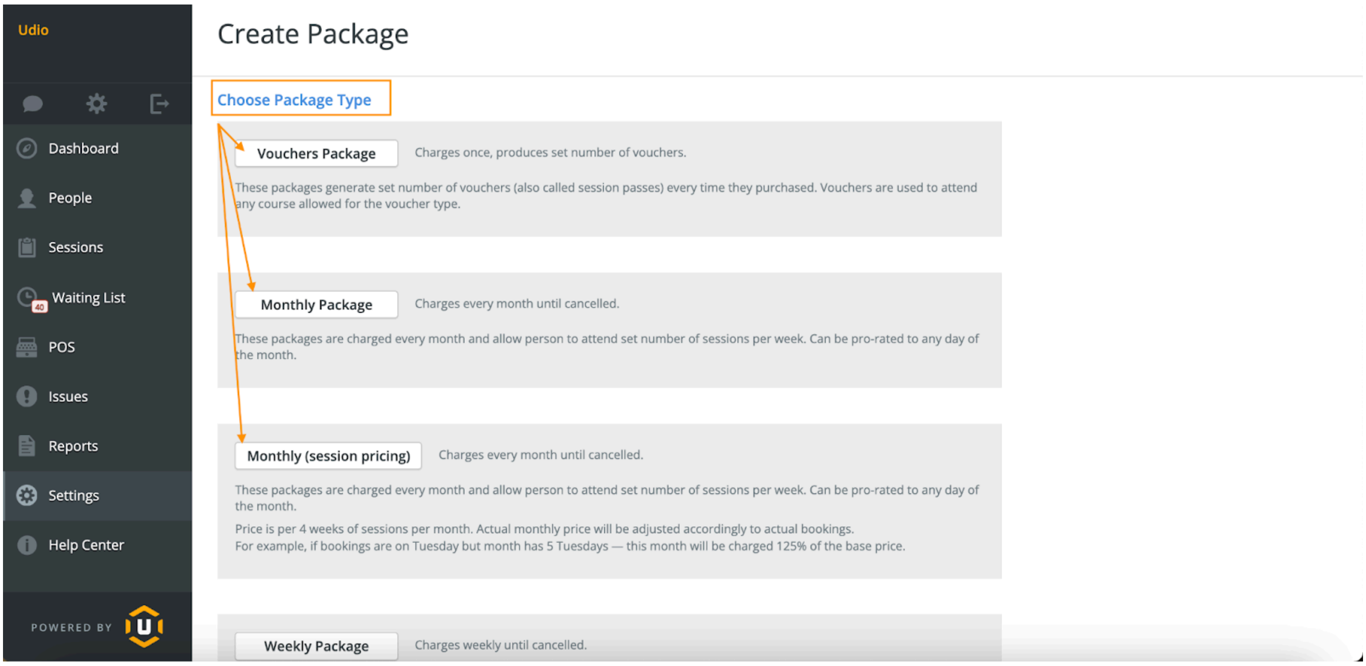
3.1.3 Configure packages, pricing and availability

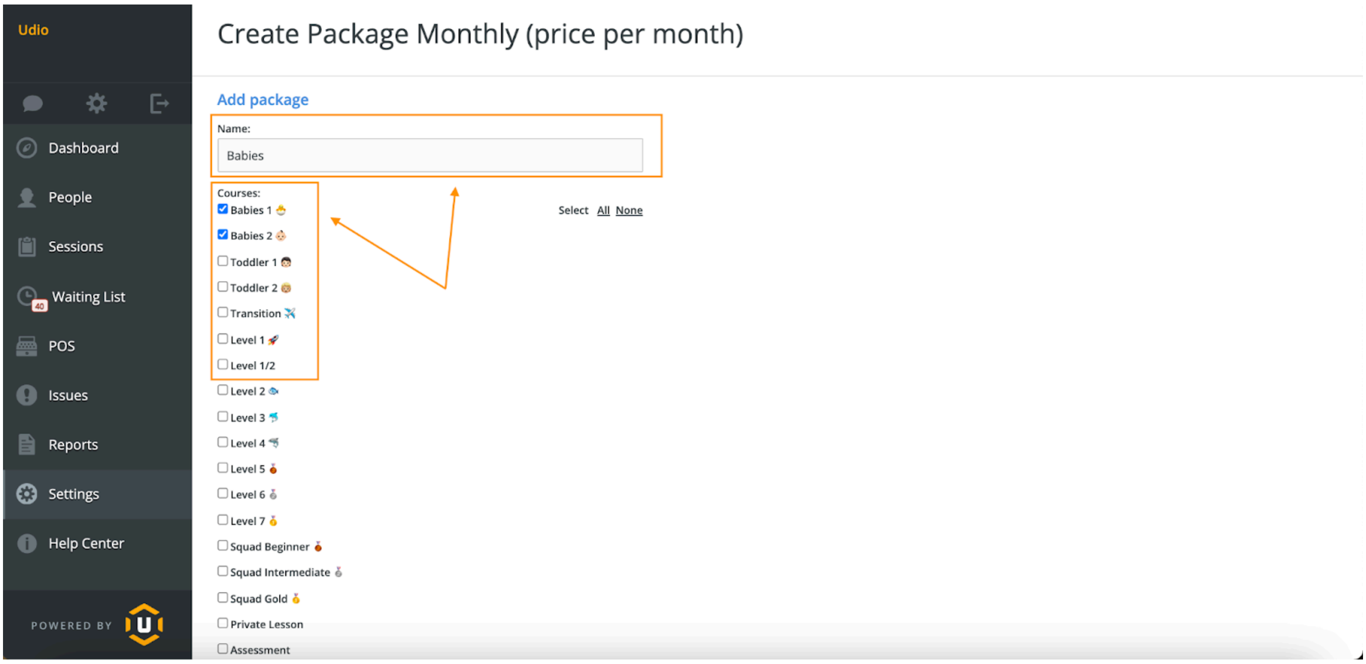
Packages, pricing and availability are all variables in business that are subject to change. In this step, you are essentially entering the price of your courses and selecting the charging interval (how often a customer is billed). We recommend separating your pricing out according to your programmes, even if the pricing is the same.

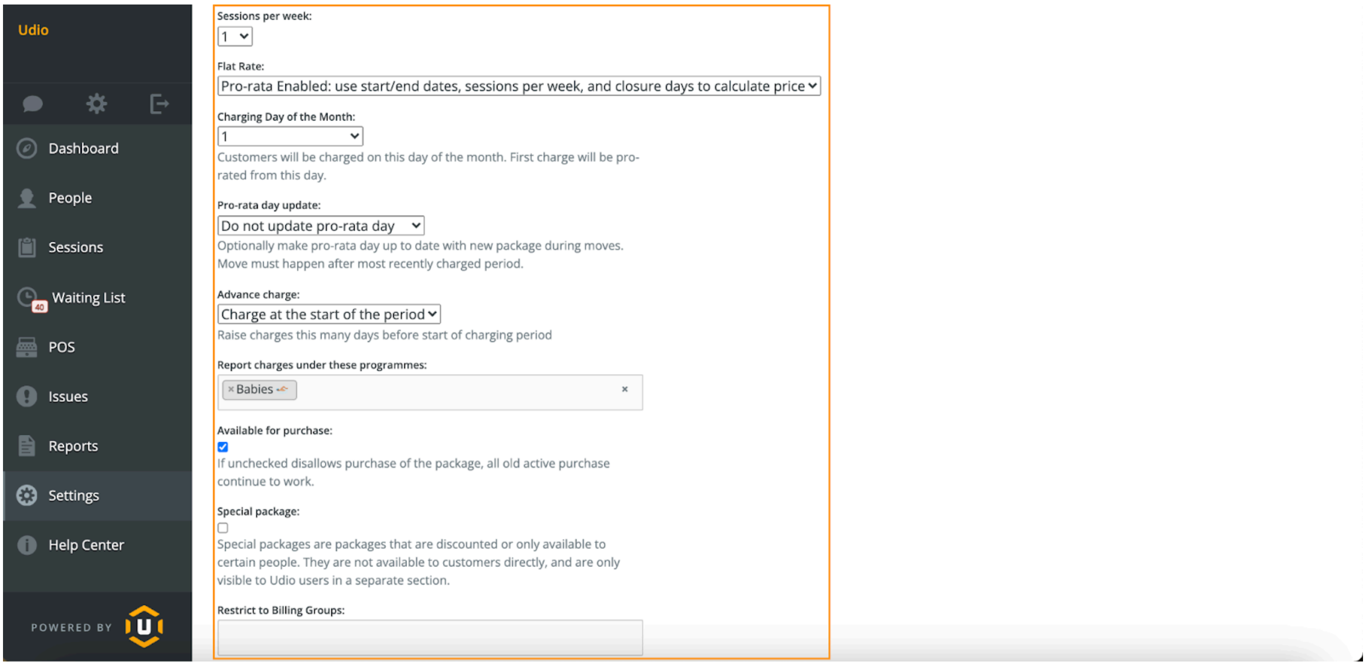
3.1.3.1 Add new packaging & pricing

- Click on *'Configure packages, pricing and availability'* and *'Add New Package'*
- Choose the appropriate package type, reading the descriptions associated with each before selecting
- Enter the package name of the package and select the courses that relate to this package
- Select the number of sessions per week from the drop-down box
- Select the charging day of the month from the drop-down box (doesn't apply to term-based)
- Do not update the pro-rata day update unless advised by Udio
- Select the advance charge' (this is the number of days in advance to raise fees, e.g. if you raise fees on the 1st of the month and don't want to charge in advance, select 'charge at the start of the period', otherwise select the number of days in advance you want to charge)
- Select the programme that you want to report charges under (note: only select one programme)
- Tick available for purchase to make sure the package is active
- If you wish to hide the package as it is not a regular purchase (such as staff discount), tick special package
- Add the billing group you wish to restrict this package to (e.g. staff discount)
- Add a description if required and click *'Confirm'*



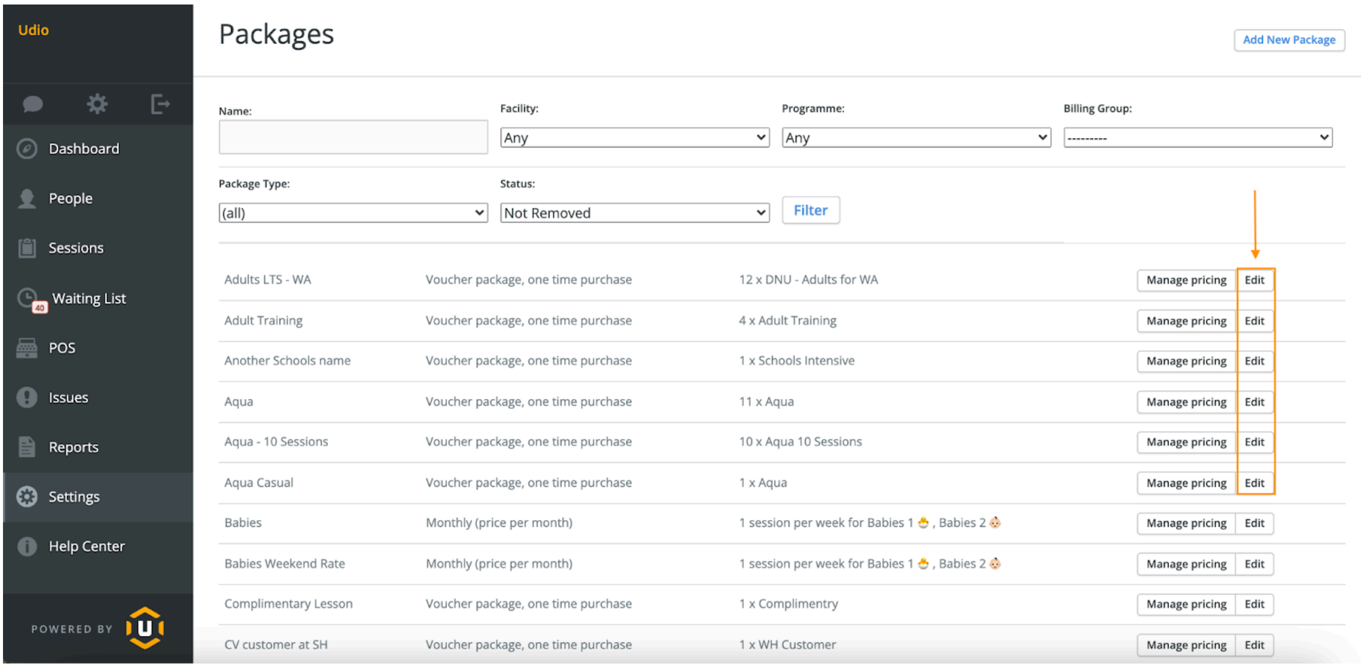

Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Help Center
POWERED BY
Create Package
Choose Package Type
Vouchers Package
Charges once, produces set number of vouchers.
These packages generate set number of vouchers (also called session passes) every time they purchased. Vouchers are used to attend any course allowed for the voucher type.
Monthly Package
Charges every month until cancelled.
These packages are charged every month and allow person to attend set number of sessions per week. Can be pro-rated to any day of the month.
Monthly (session pricing)
Charges every month until cancelled.
These packages are charged every month and allow person to attend set number of sessions per week. Can be pro-rated to any day of the month.
Price is per 4 weeks of sessions per month. Actual monthly price will be adjusted accordingly to actual bookings.
For example, if bookings are on Tuesday but month has 5 Tuesdays — this month will be charged 125% of the base price.
Weekly Package
Charges weekly until cancelled.


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Help Center
POWERED BY
Create Package Monthly (price per month)
Add package
Name:
Babies
Courses:
Select All None
Babies 1
Babies 2
Toddler 1
Toddler 2
Transition
Level 1
Level 1/2
Level 2
Level 3
Level 4
Level 5
Level 6
Level 7
Squad Beginner
Squad Intermediate
Squad Gold
Private Lesson
Assessment



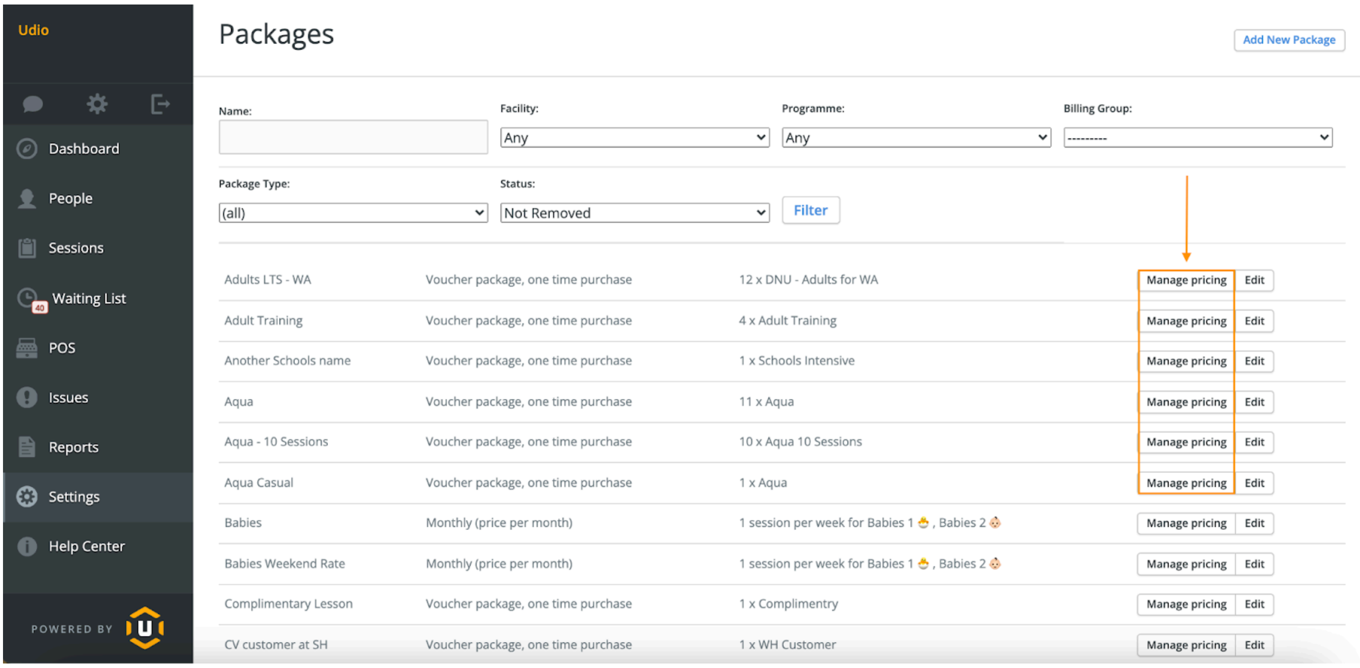
3.1.3.2 Edit packaging & pricing

- Click on the *'Edit'* button and make any changes
- Click *'Confirm'* to save

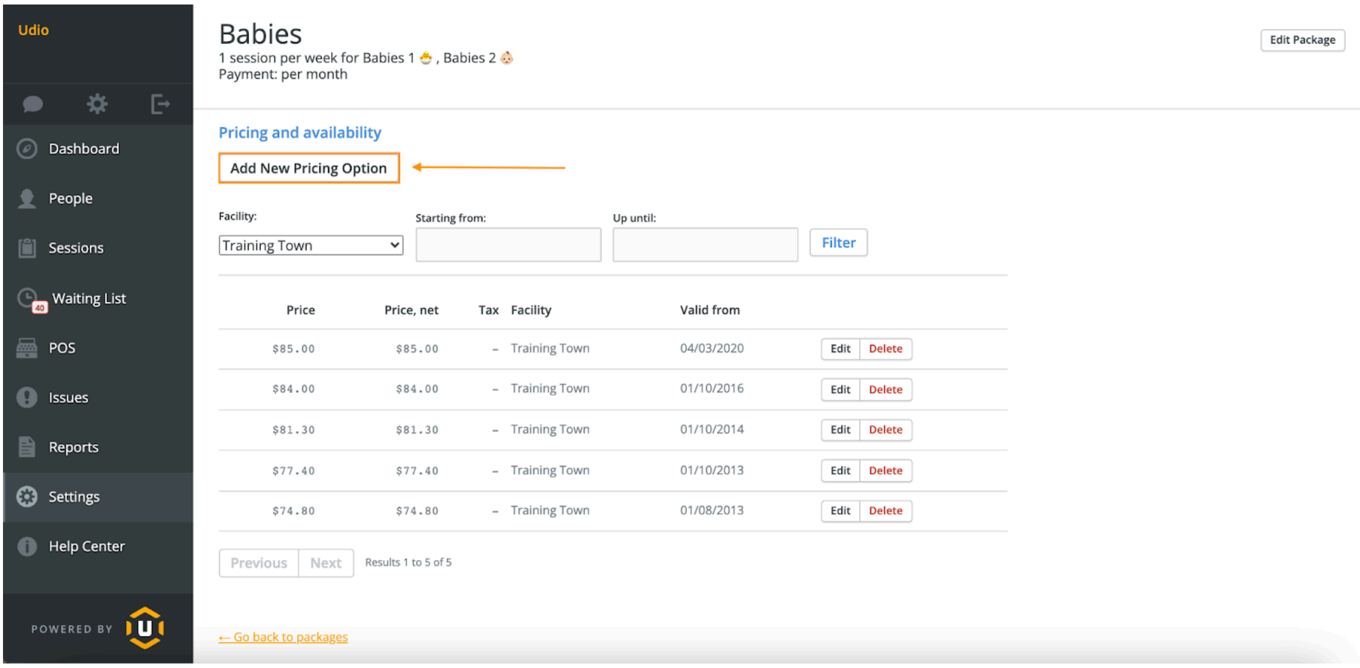


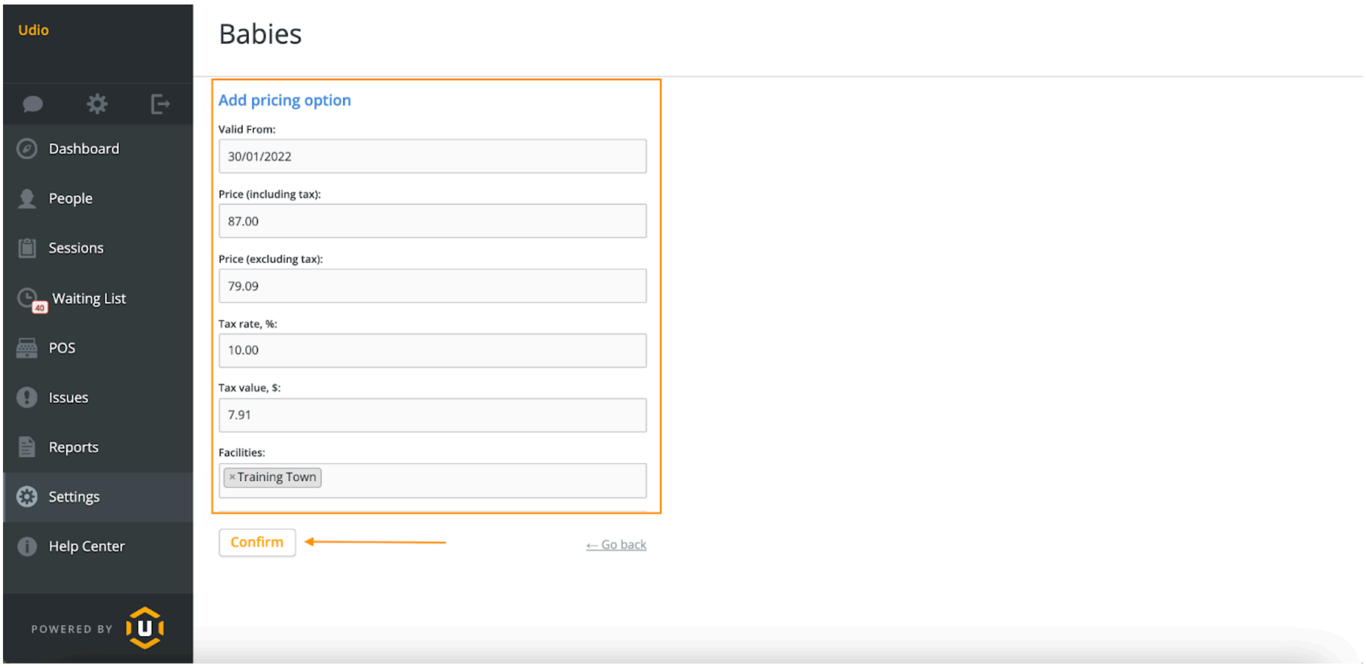
3.1.3.3 Manage/update fees

- Click *'Manage pricing'* next to the package you wish to edit
- Select *'Add New Pricing Option'*
- Enter the start date (cannot post-date), price including tax and tax rate
- The price excluding tax and tax value will be automatically updated
- Select the facilities this price applies to
- Click *'Confirm'* to save the changes


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Help Center
POWERED BY
Packages
Add New Package
Name:
Facility:
Any
Programme:
Any
Billing Group:

Package Type:
(all)
Status:
Not Removed
Filter
Adults LTS - WA
Voucher package, one time purchase
12 x DNU - Adults for WA
Manage pricing
Edit
Adult Training
Voucher package, one time purchase
4 x Adult Training
Another Schools name
Voucher package, one time purchase
1 x Schools Intensive
Aqua
Voucher package, one time purchase
11 x Aqua
Aqua - 10 Sessions
Voucher package, one time purchase
10 x Aqua 10 Sessions
Aqua Casual
Voucher package, one time purchase
1 x Aqua
Babies
Monthly (price per month)
1 session per week for Babies 1 , Babies 2
Babies Weekend Rate
Monthly (price per month)
1 session per week for Babies 1 , Babies 2
Complimentary Lesson
Voucher package, one time purchase
1 x Complimentry
CV customer at SH
Voucher package, one time purchase
1 x WH Customer


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Help Center
POWERED BY
Babies
1 session per week for Babies 1 , Babies 2
Payment: per month
Edit Package
Pricing and availability
Add New Pricing Option
Facility:
Training Town
Starting from:
Up until:
Filter
Price
Price, net
Tax
Facility
Valid from
$85.00
$85.00
–
Training Town
04/03/2020
Edit
Delete
$84.00
$84.00
–
Training Town
01/10/2016
$81.30
$81.30
–
Training Town
01/10/2014
$77.40
$77.40
–
Training Town
01/10/2013
$74.80
$74.80
–
Training Town
01/08/2013
Previous
Next
Results 1 to 5 of 5
← Go back to packages



3.2 Discounts

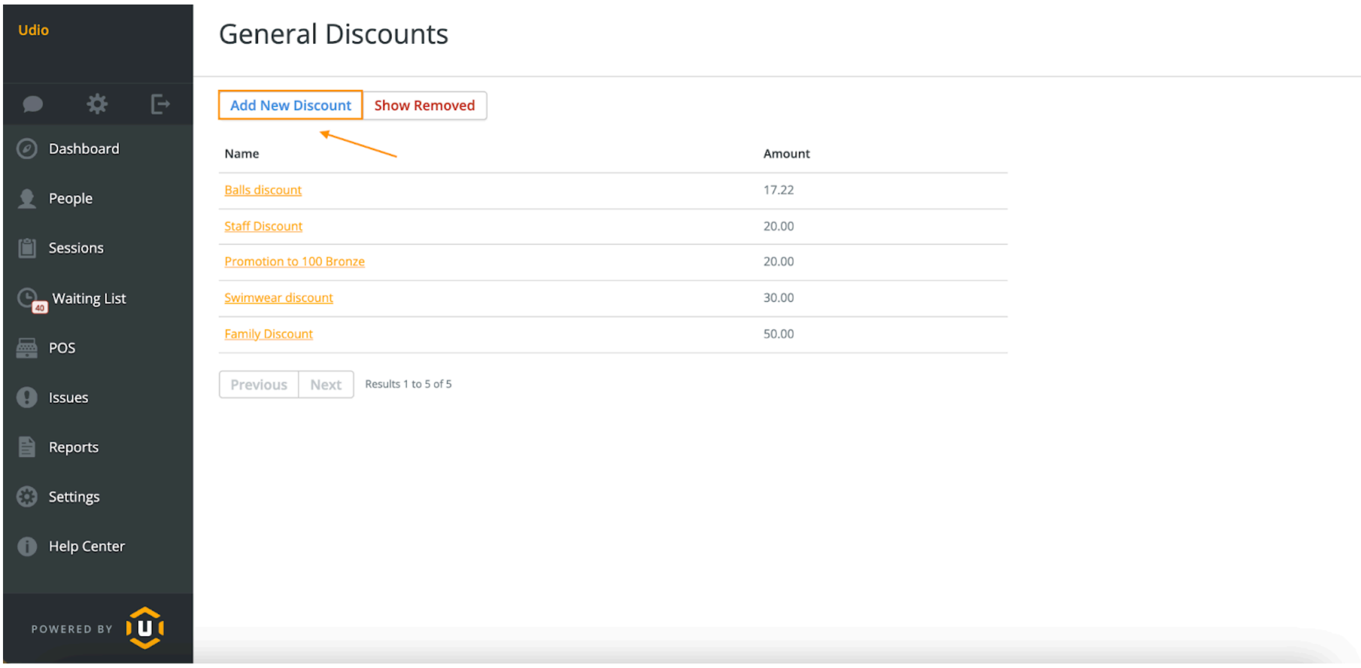
Some businesses offer discounts for families or on products. General discounts apply to invoice value and package discounts apply depending on the number of purchases active on a billing account.

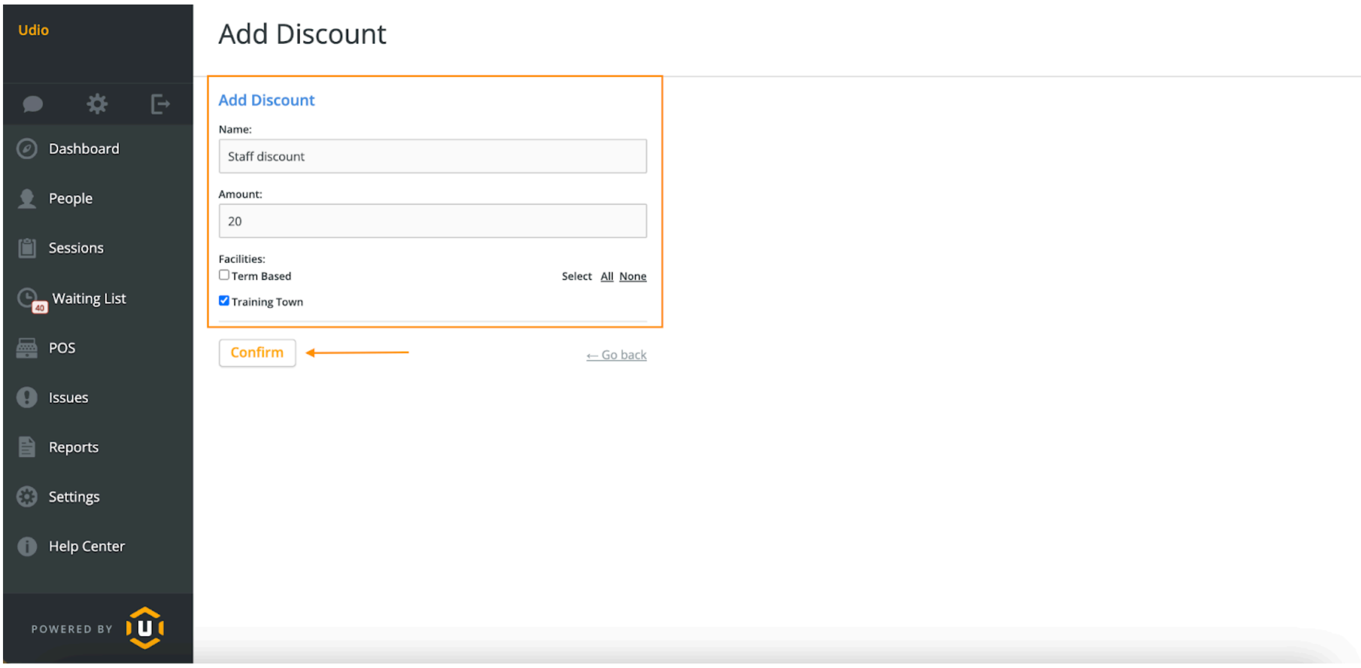
3.2.1 Configure general discounts

General discounts are those that apply when using the point of sale system (for example, 20% staff discount).

3.2.1.1 Add new discount

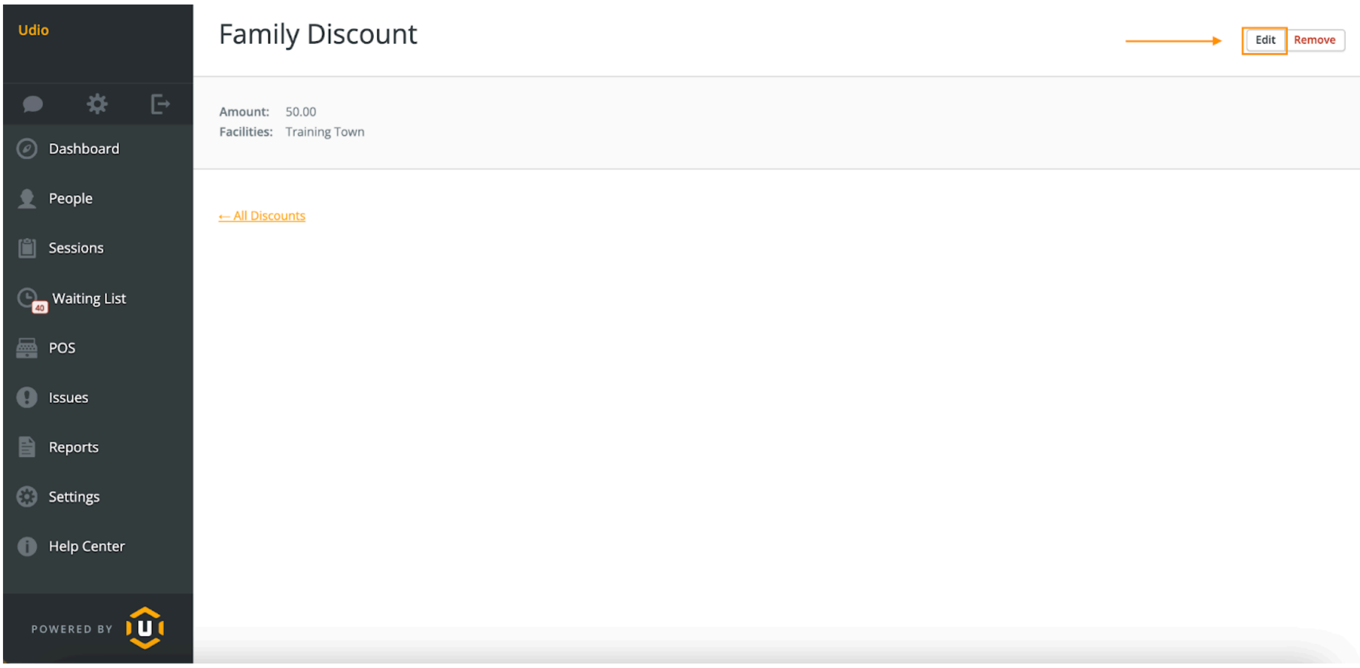
- Click on *'Configure general discounts'* and select *'Add New Discount'*
- Enter the name and discount amount as a percentage, then tick the facility that the discount relates to
- Click *'Confirm'*





3.2.1.2 Editing discounts

- Click on the name of the discount and then the *'edit* 'button; make changes to the name, description, packages, facilities and discount rules
- Click *'Confirm'* to save the changes

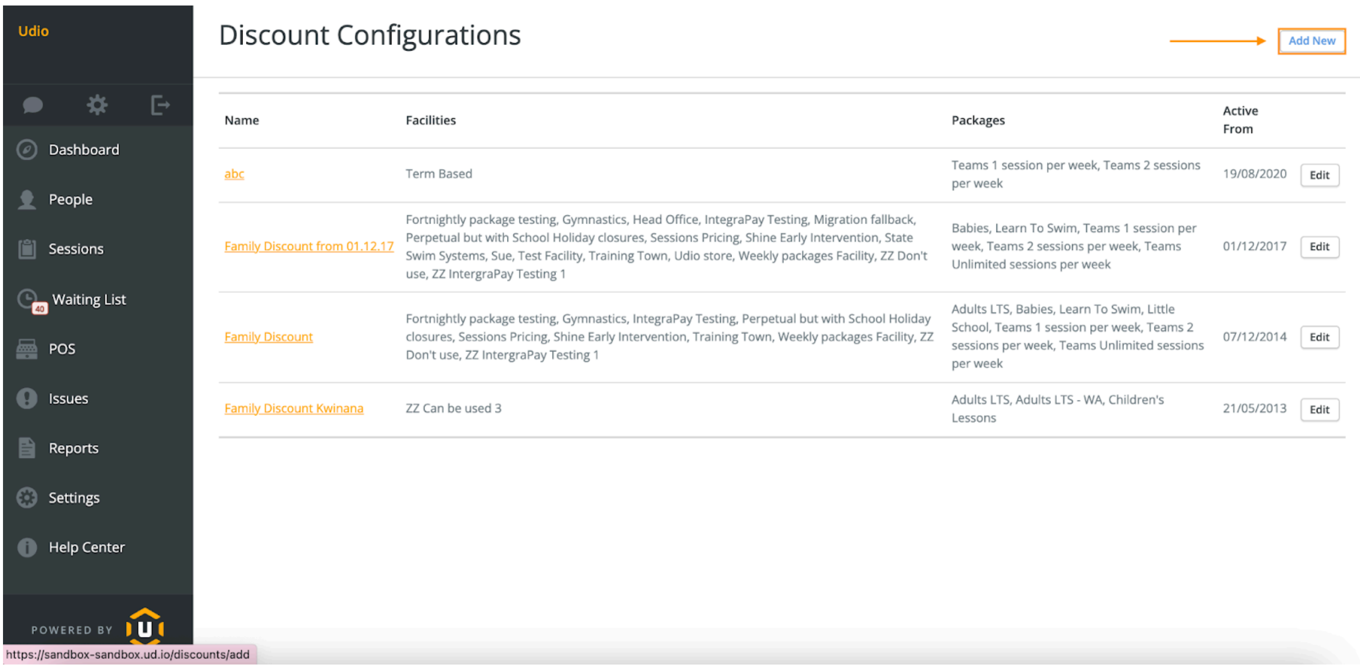


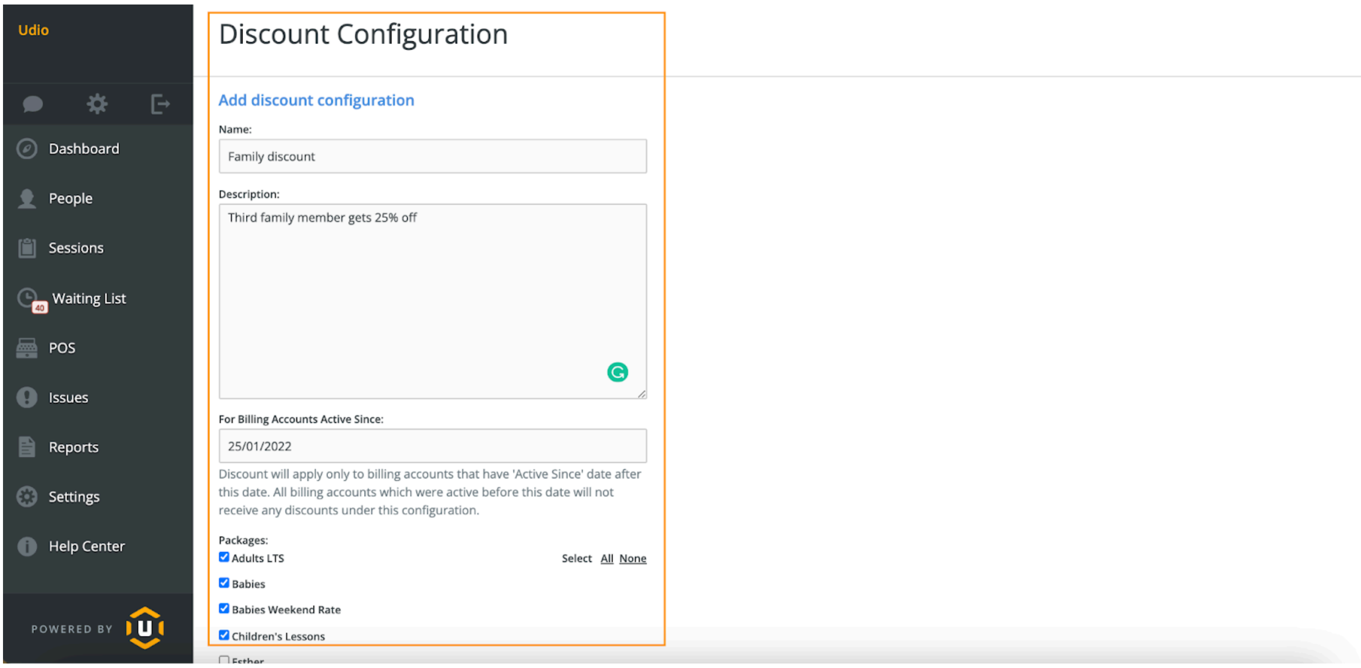
3.2.2 Configure package discounts

Package discounts can be used to discount the cost of a course. For example, if a family has two members already signed up at your business, you may elect to give the third family member a discount. You can also discount a person attending multiple lessons.

3.2.2.1 Add new discounts

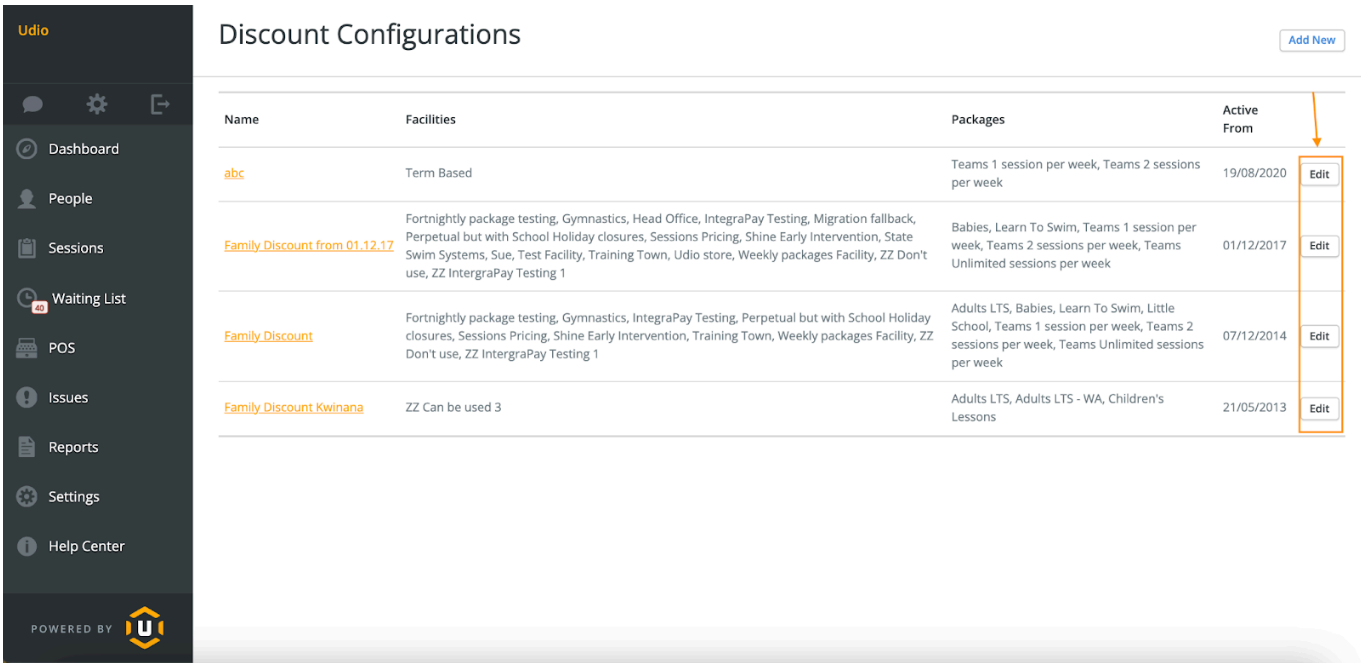
- Click on *'Configure package discounts'* and select *'Add New'*
- Enter the name and description, then select the packages and facilities the discount applies to
- Apply your businesses discount policy - there is individual purchases and all purchases discount - please read the information or contact Udio
- Click *'Confirm*





3.2.2.1 Edit

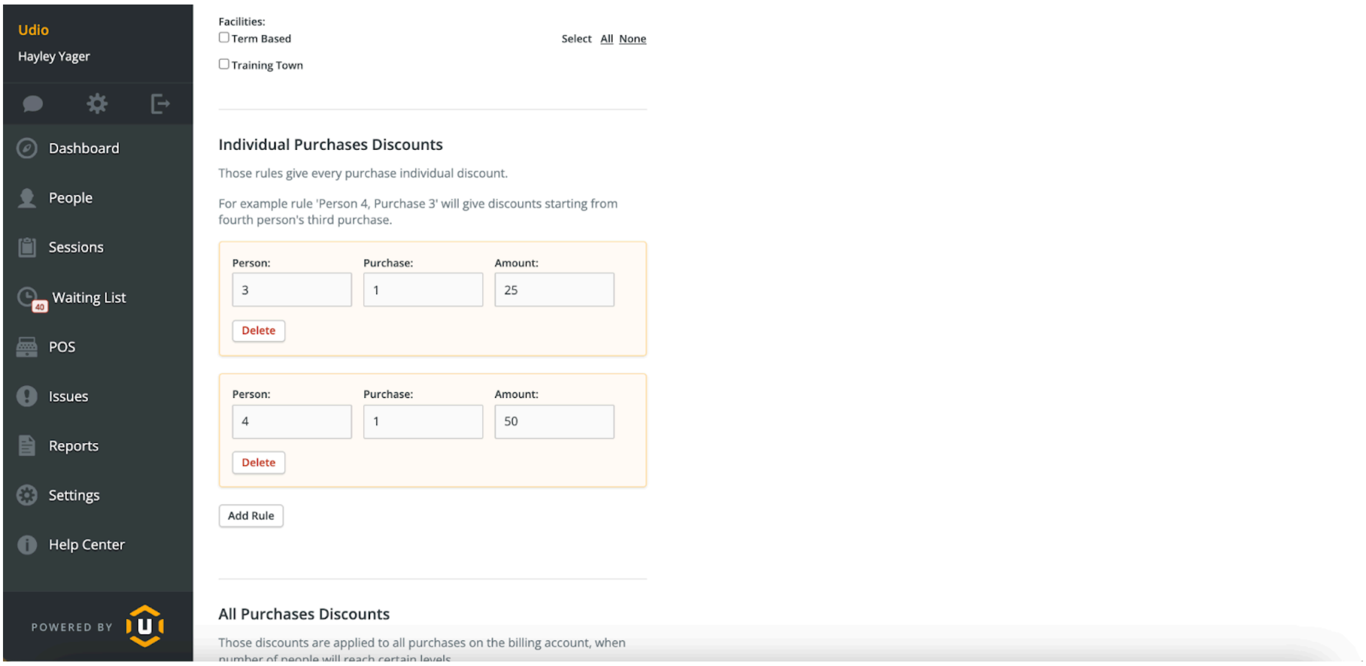
- Click on the *'Edit'* button to make changes to the name, description, packages, facilities and discount rules
- Click *'Confirm'* to save the changes



Individual Purchases Discounts

This rule will give every purchase individual discount. For example, if a third child receives a 25% discount and a fourth child receives a 50% discount, you 'Add Rule':

- Person: 3
- Purchase: 1
- Amount: 25%



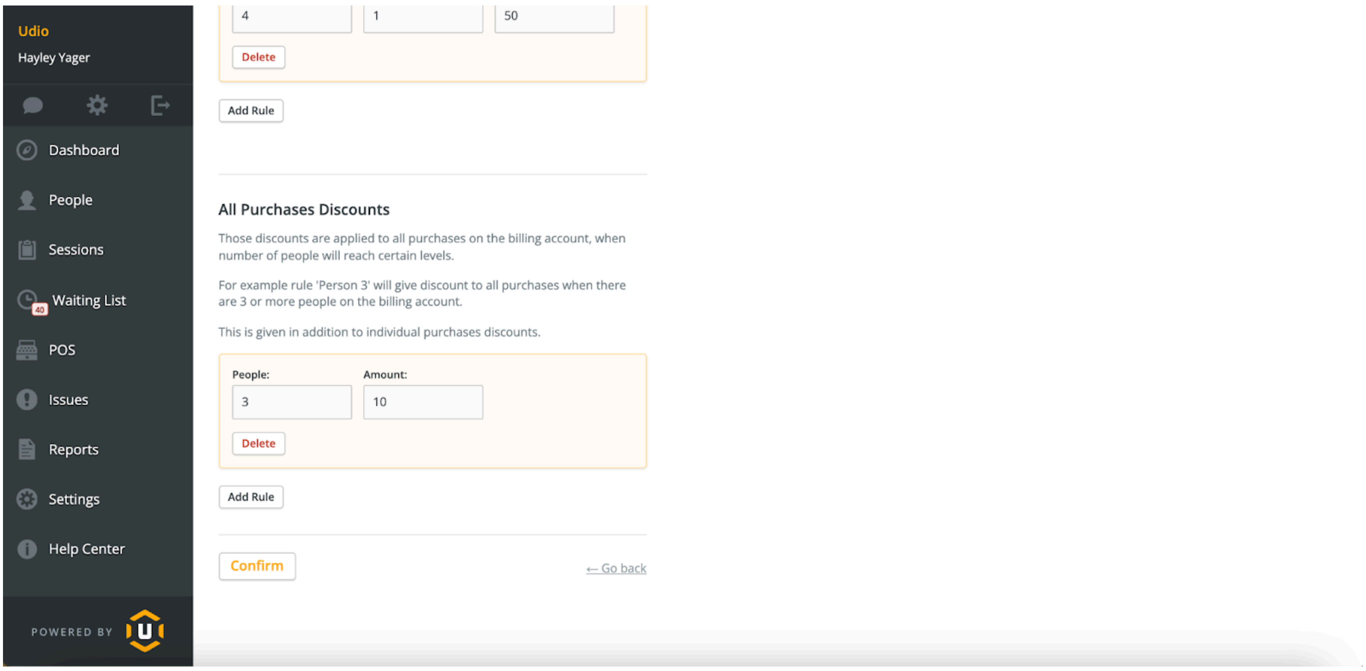
Repeat for person four. Four and over will receive this discount. If you want to give a discount on a second lesson for a student:

- Person: 1
- Purchase: 2
- Amount: 10%

All Purchases Discounts

If you want to give a discount to all family members when they reach a number of bookings, you will enter the information here. For example:

- People: 3
- Amount: 10%



This discount will then apply to all family members that have a booking.

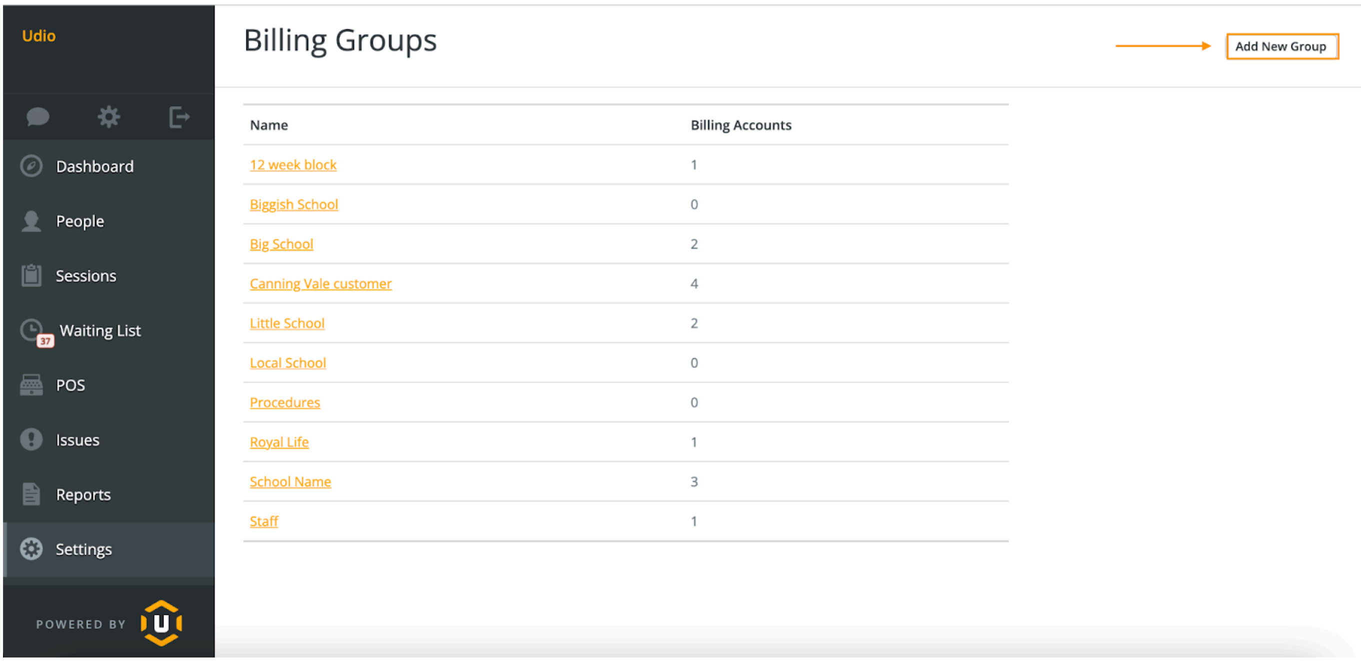
3.3 Billing

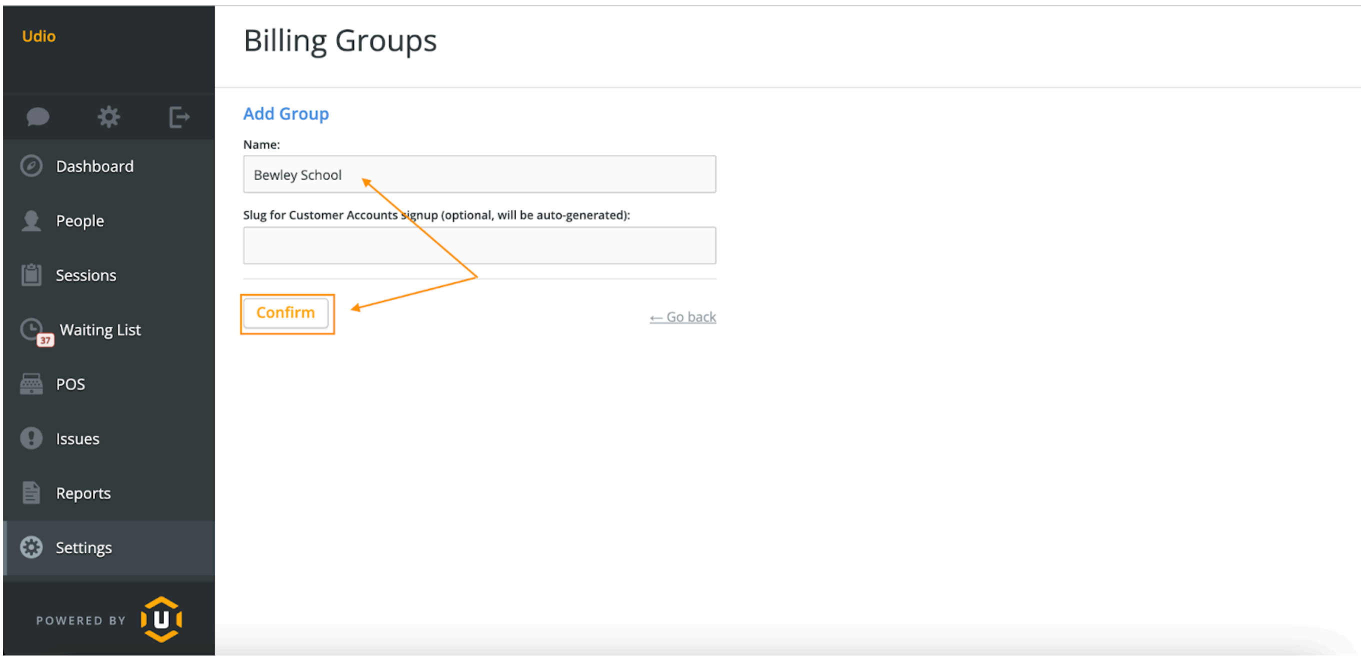
3.3.1 Billing groups

Creating and associating people with billing groups allows you to offer a different fee. You can also search on this group, send them specific marketing emails and identify how many are booked in, the amount of fees raised and the amount paid for each different group.

3.3.1.1 Add new group

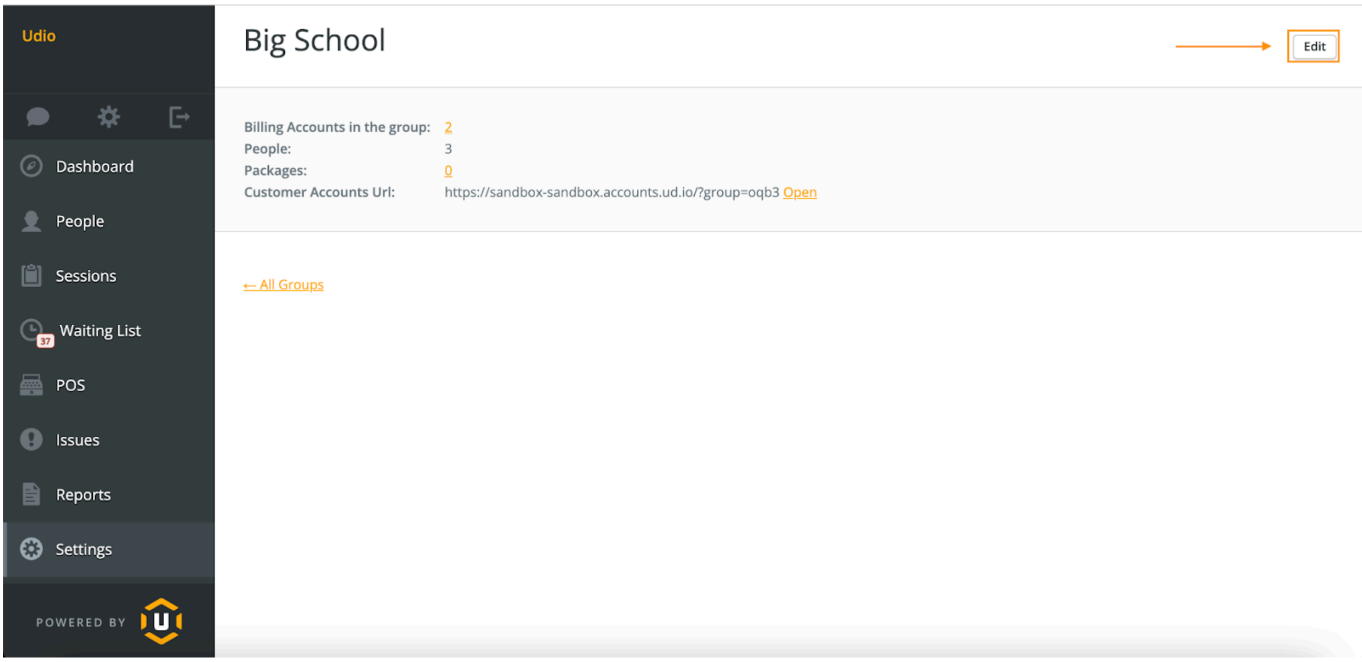
- From settings, click on *'Billing Groups'*
- Click on *'Add New Group'*
- Type in the name of the group (you don't need to add a URL, this will be created automatically) and click *'Confirm'*





3.3.1.2 Edit billing groups

- Click on the name of the group that you wish to edit
- Click on *'Edit'*
- Update the name and click *'Confirm'* once edit is complete



3.3.1.3 Delete billing groups

You can only delete a group if there are no billing accounts associated with it.

- Click on the name of the group that you wish to delete
- Click on *'delete'*
- Click *'delete'* again to confirm

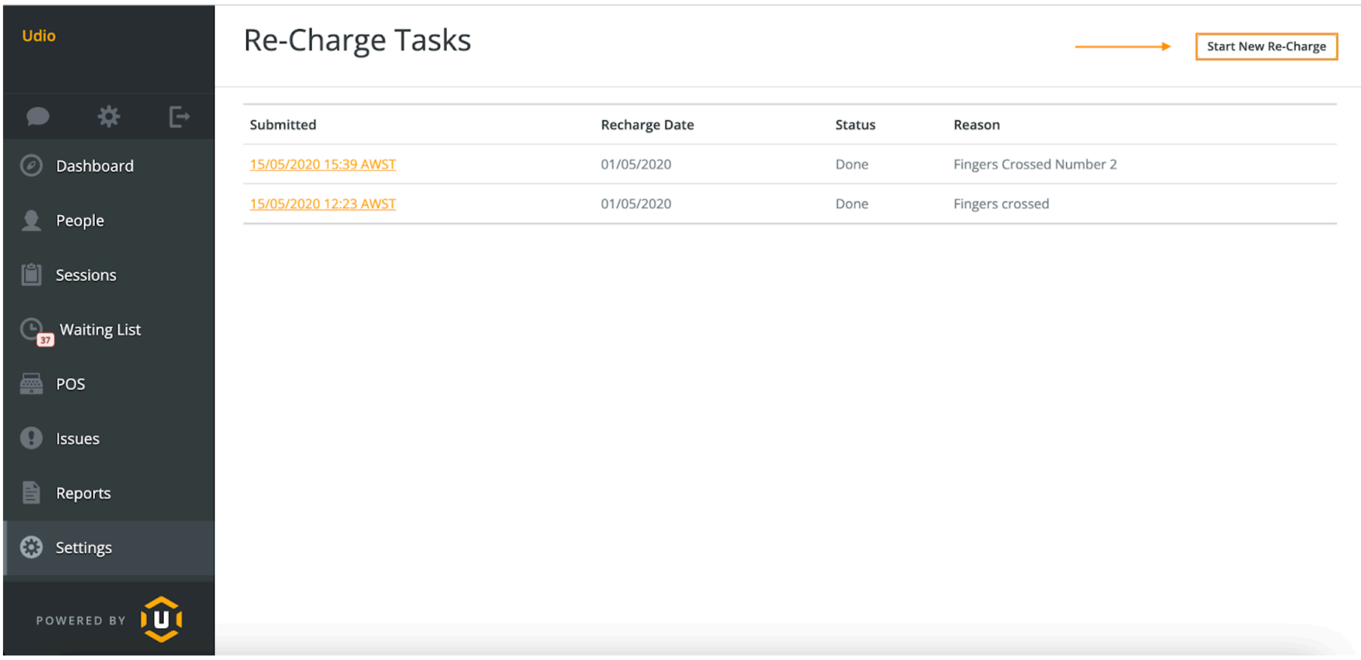
3.3.2 Re-charging of past charges

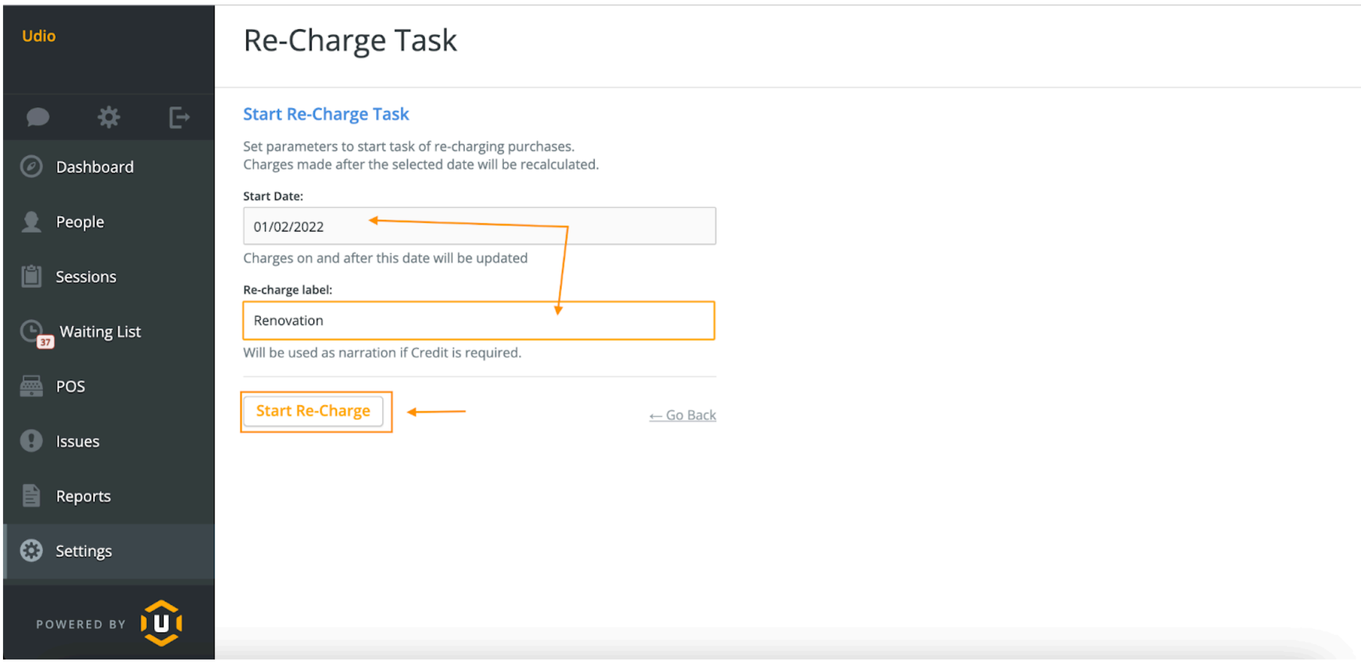
When coming out of a closure part way through a billing cycle, you can recharge customers for the remainder of the billing cycle.

Ensure you have deleted the closure dates from the re-opening date, then:

- Click on *'Start New Re-Charge'*
- Enter the beginning date of your billing cycle
- Add a re-charge label and click *'Start Re-Charge'*

The re-charge will take a number of hours to process. Once complete, there will be a summary of the transactions, as well as the option to download the file.

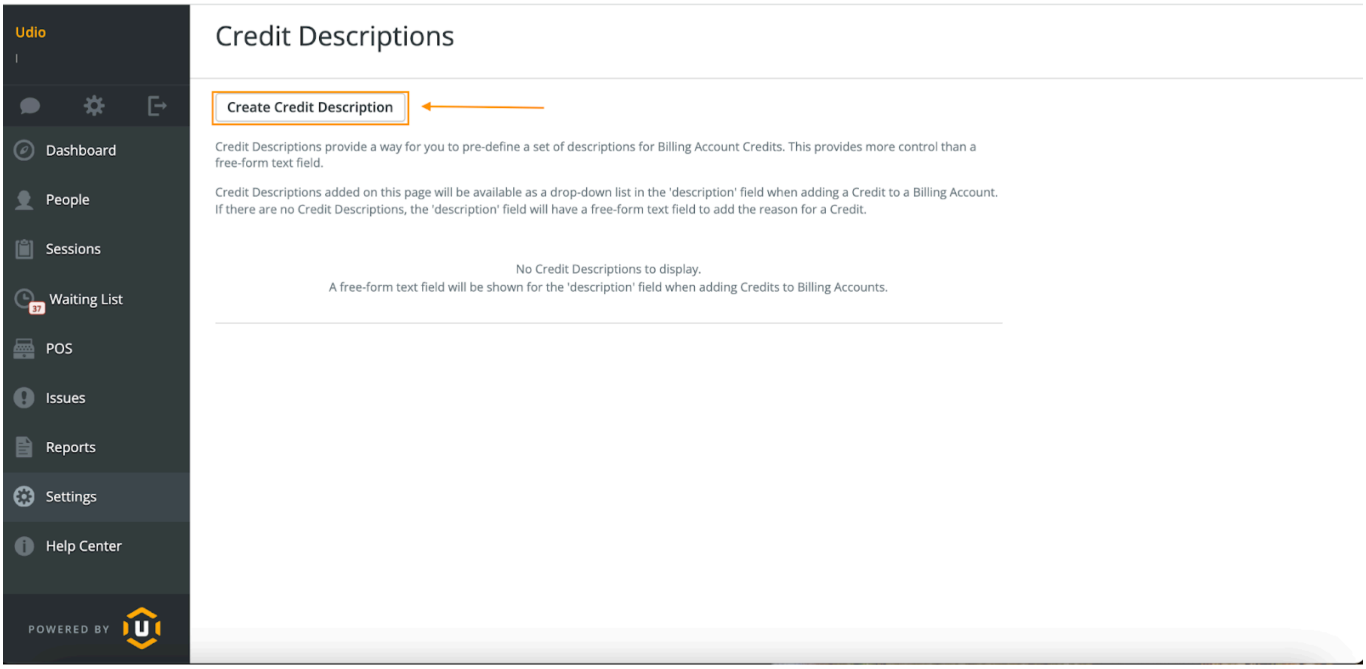


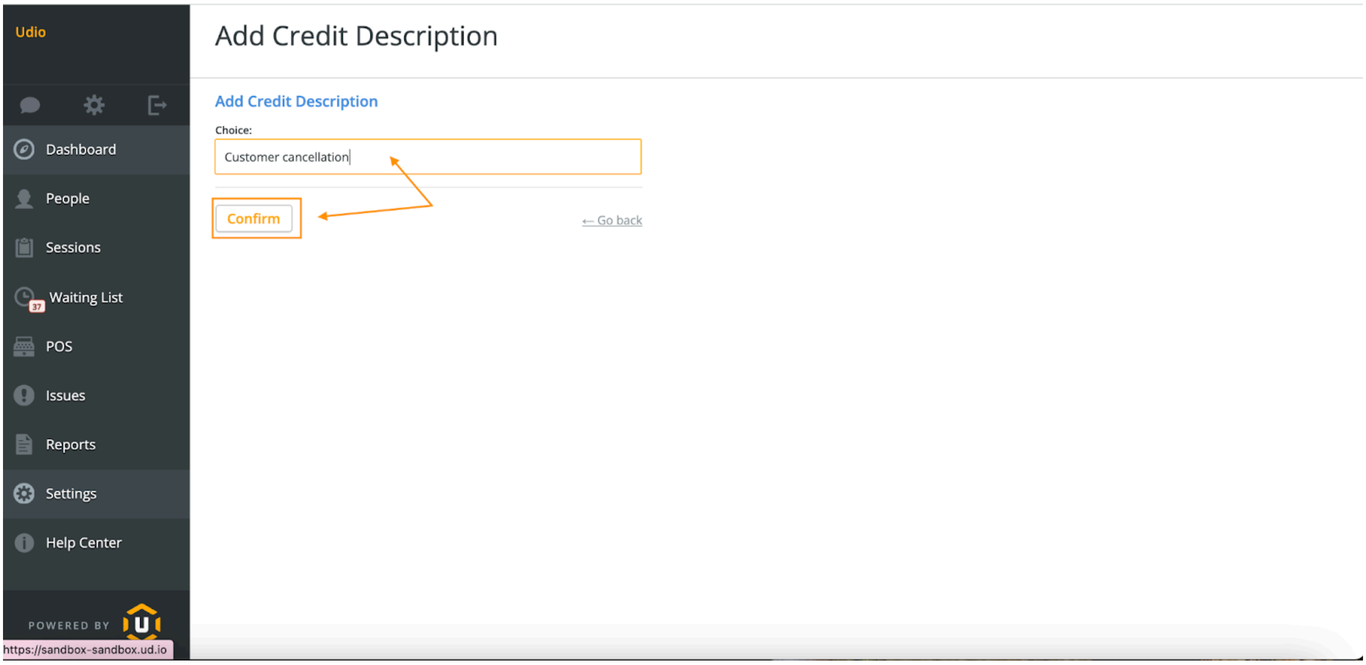


3.3.3 Credit descriptions

The default credit items are free-form text under the *'Add Credit'* button in the billing account. If, however, you want to update that so your staff can only select from a dropdown box, you need to create credit descriptions.

- First, you will need to update your permissions under *'Users'* to *'Credit Description (all)'*.
- Ensure you read the information provided on the screen before setting up credit descriptions
- Click on *'Create Credit Descriptions'*
- Enter a description to select from and *'confirm'*
- Repeat for all the descriptions you would like added





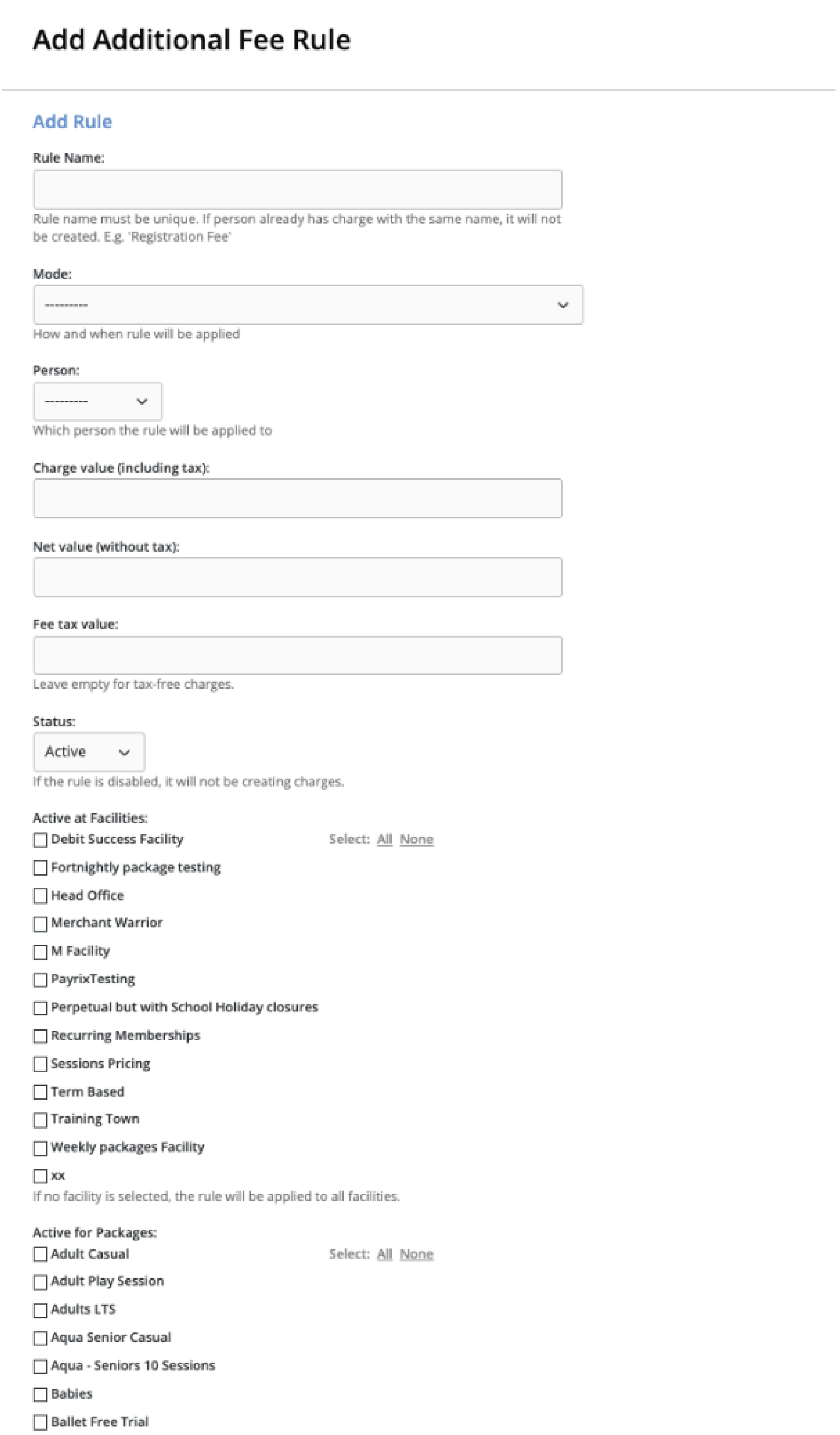
3.3.4 Additional Fees

If you charge a once off enrolment fee or charge annually, you can set this up in Udio

- Add New Rule
- Add the rule name, such as enrolment fee
- The Mode, either once off or annual subscriptions
- Select the person #
- Add the Charge, net value and tax information
- Status is active
- Select your facilities or leave blank if it applied to all

- Select your packages that the enrolment applied to, or leave blank if it applies to all
- Click *'Save'*

Repeat if you have other auto fees that you charge such as returning customers



Add Additional Fee Rule

Add Rule

Rule Name:

Rule name must be unique. If person already has charge with the same name, it will not be created. E.g. 'Registration Fee'

Mode:

How and when rule will be applied

Person:

Which person the rule will be applied to

Charge value (including tax):

Net value (without tax):

Fee tax value:

Leave empty for tax-free charges.

Status:

Active

If the rule is disabled, it will not be creating charges.

Active at Facilities: Select: All None

- [ ] Debit Success Facility
- [ ] Fortnightly package testing
- [ ] Head Office
- [ ] Merchant Warrior
- [ ] M Facility
- [ ] PayrixTesting
- [ ] Perpetual but with School Holiday closures
- [ ] Recurring Memberships
- [ ] Sessions Pricing
- [ ] Term Based
- [ ] Training Town
- [ ] Weekly packages Facility
- [ ] xx

If no facility is selected, the rule will be applied to all facilities.

Active for Packages: Select: All None

- [ ] Adult Casual
- [ ] Adult Play Session
- [ ] Adults LTS
- [ ] Aqua Senior Casual
- [ ] Aqua - Seniors 10 Sessions
- [ ] Babies
- [ ] Ballet Free Trial

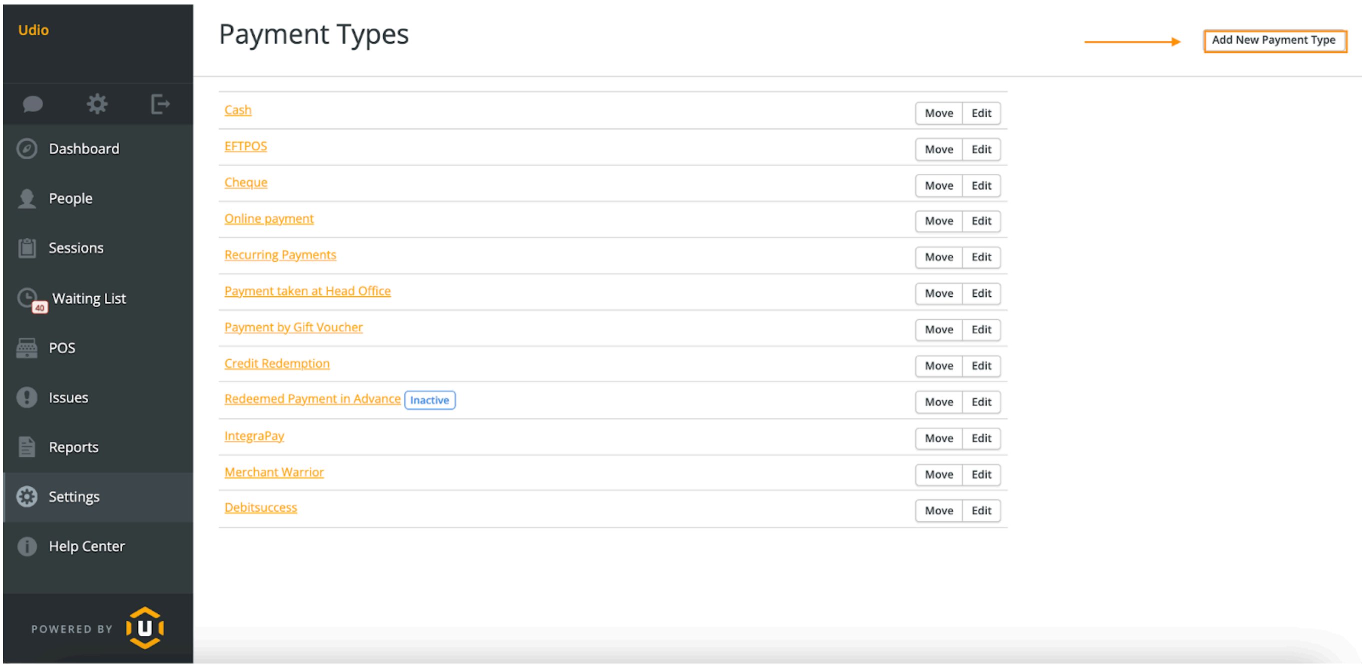
• 3.4. Payments

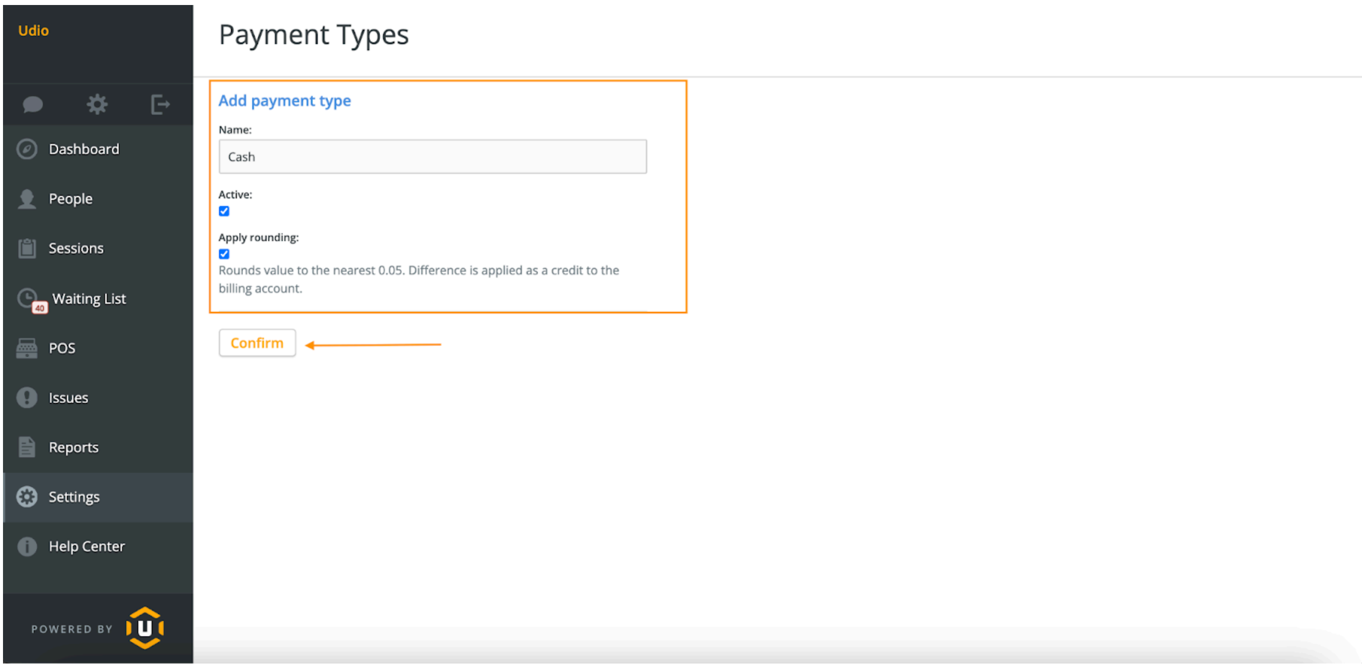
3.4.1 Configure payment types

Payment types are where you select how your business will accept payment for your goods or services. To help with a faster setup, we've pre-populated this section with some data.

3.4.1.1 Add new payment type

- Under *'Configure payment types'* select *'Add New Payment Type'* (if the payment type is cash, click '*Apply rounding*')
- Click *'Confirm'*

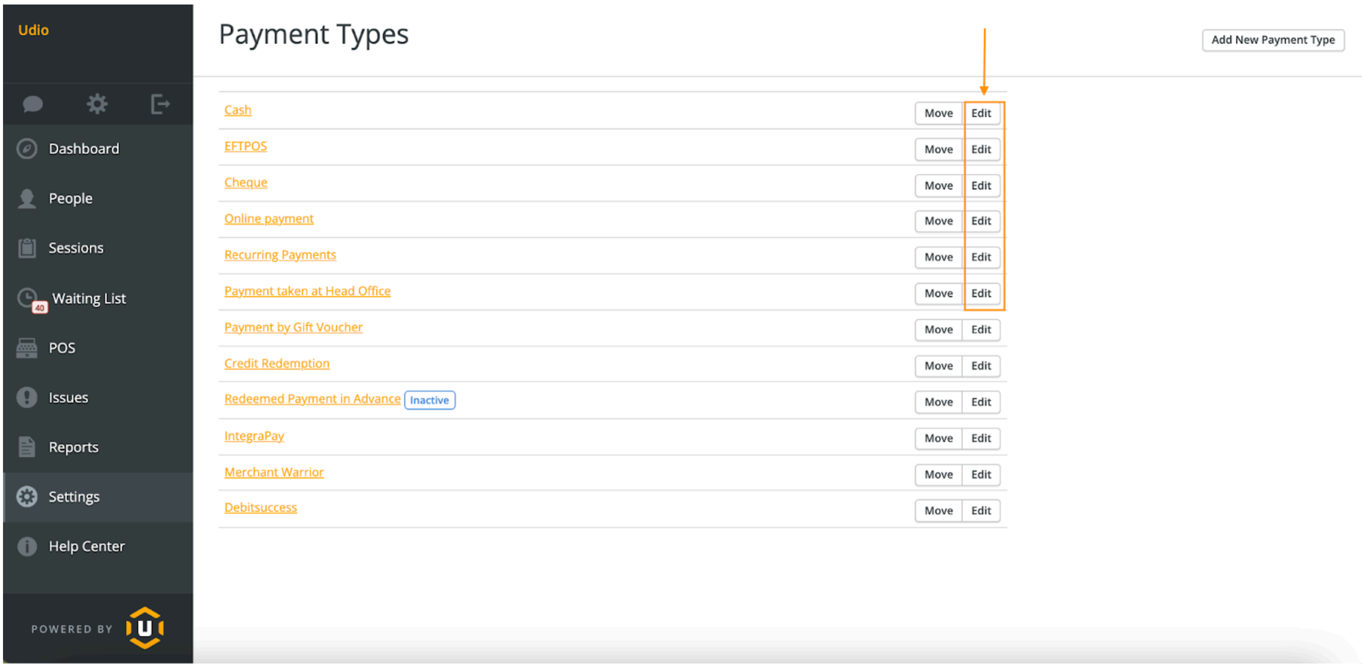




3.4.1.2 Edit a payment type

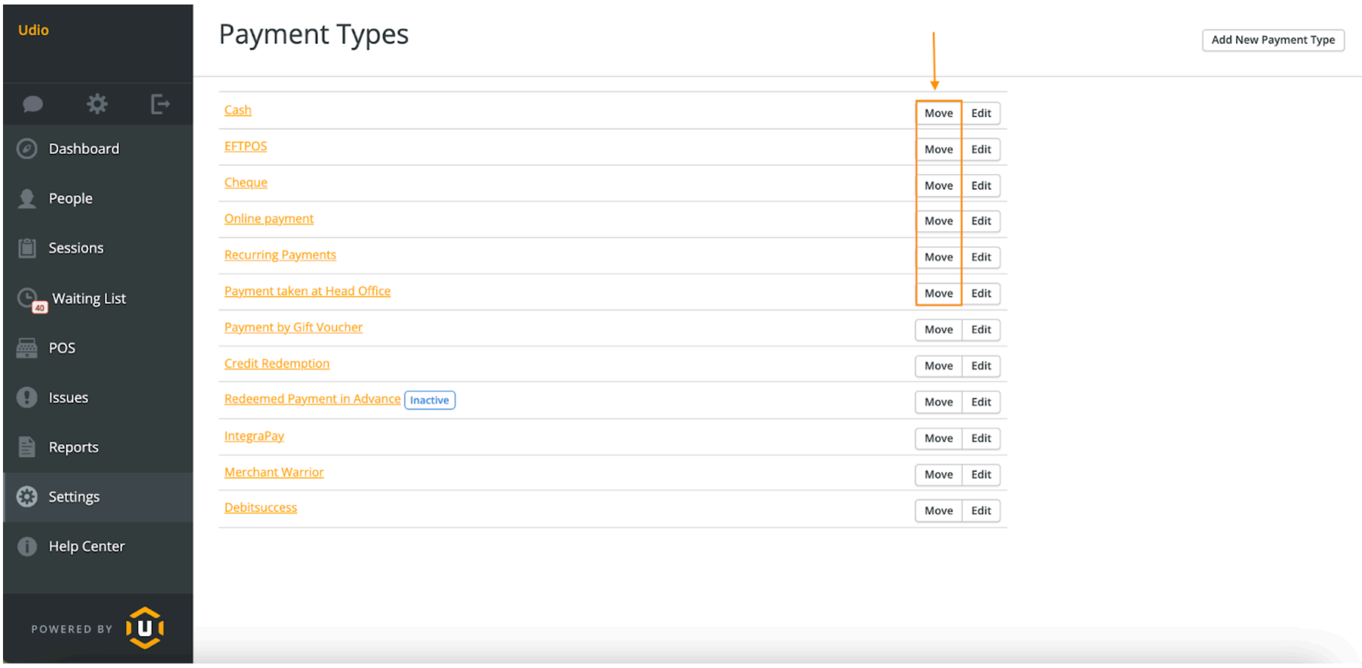
- Click on the *'Edit'* button and make changes to the name, description and checkboxes

- Click *'Confirm'*



3.4.1.3 Move a payment type

- Click and hold the '*move*' button
- Move the payment type to where you require it to be



3.5 Payment providers

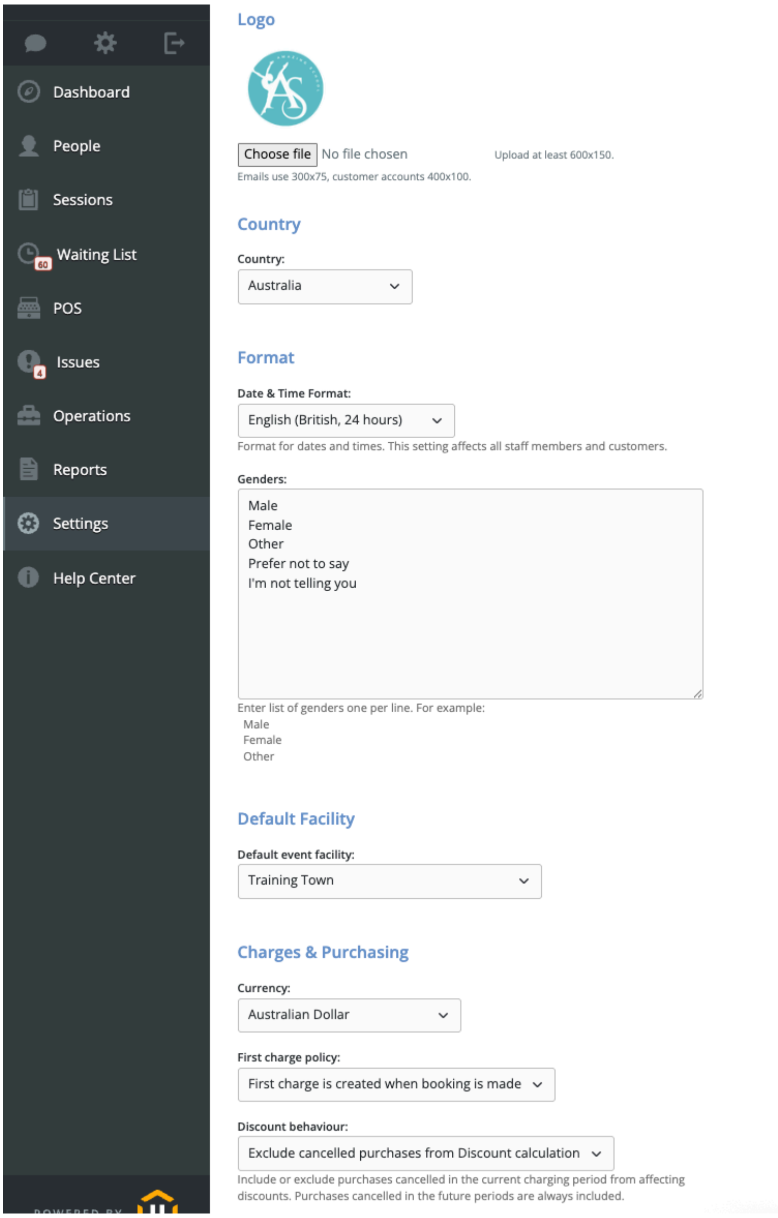
Please note: you must contact the third-party payment provider you wish to connect with to set up your account and negotiate fees. Udio does not get involved with the negotiation. Please do not update this section without contacting Udio first.

4. Account

4.1 General Settings

4.1.1 Logo

- Under *'General Settings'*, the first thing you will see is a space to upload your logo
- The size should be at least 600 x 150
- Recommended size is 300 x 75 which will ensure all outgoing emails are styled the same as your other branding/promotional material
- Note: you can update the logo size for the customer portal in '*Customer Accounts Settings*'



4.1.2 Country

– Select the country that you are operating in

- You can only select one country per account; if you operate across multiple countries, we can create different accounts for each (you'll still be able to navigate easily between the countries)

4.1.3 Format

- Update to the Date & Time format to your country

4.1.4 Genders

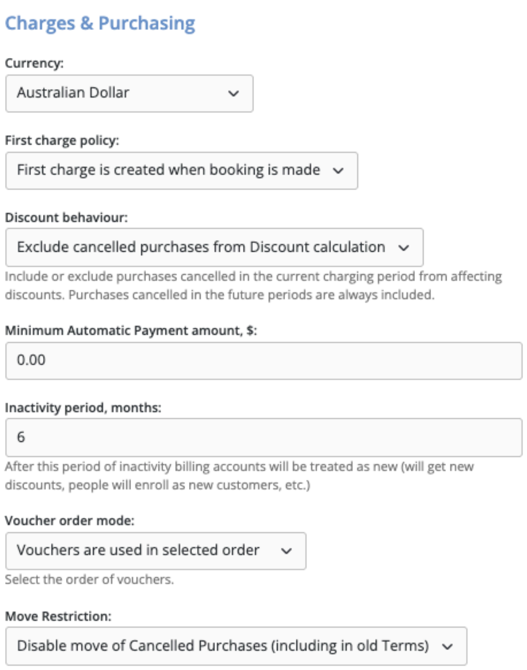
- Up can add your own list of genders

4.1.5 Default Facility

- Update the event facility to your main location

4.1.6 Charges & Purchasing

- Currency – choose the relevant currency for your business
- First charge policy – select from the drop-down box
- Course per purchase restriction – select from the drop-down box
- Discount behaviour – select from the drop-down box (please read the explanation for this field)
- Minimum automatic payment – enter a dollar and cent amount, e.g. $2.50
- Inactivity period, months - please read the explanation for this field
- Voucher order mode - you can select the order of vouchers
- Move restriction - you can disable or enable movements when the package is cancelled such as when a term has been rolled over



4.1.7 Achievements

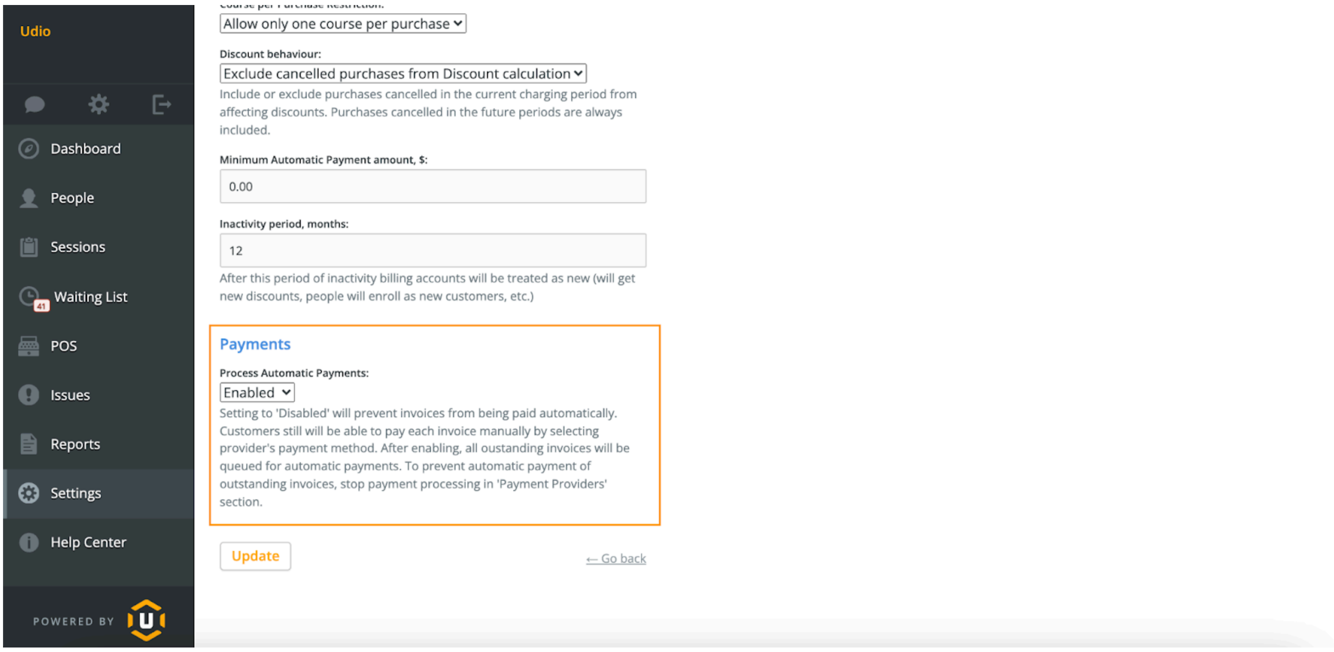
- You can add your stages of progression of your achievements

4.1.8 Account Security

- You can choose the length of your password and complexity. These will apply to both staff and customers in the Portal / App
- You can choose multi-factor Authentication, this will apply to staff only

4.1.9 Payments

- Process automatic payments - enable or disable the different payment providers Udio provides (please read the explanation for this field)



If you use surcharges for automatic payments, you can select to reverse the surcharges on the failed payment.

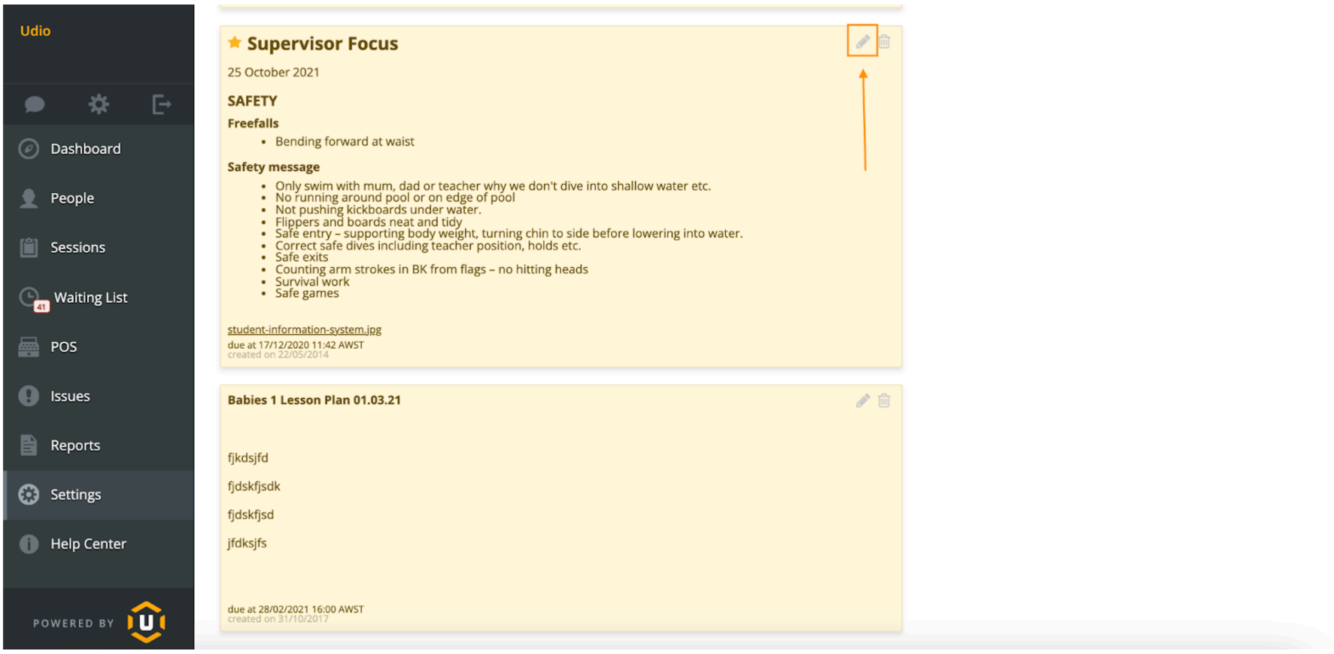
4.2 Mobile App Setup

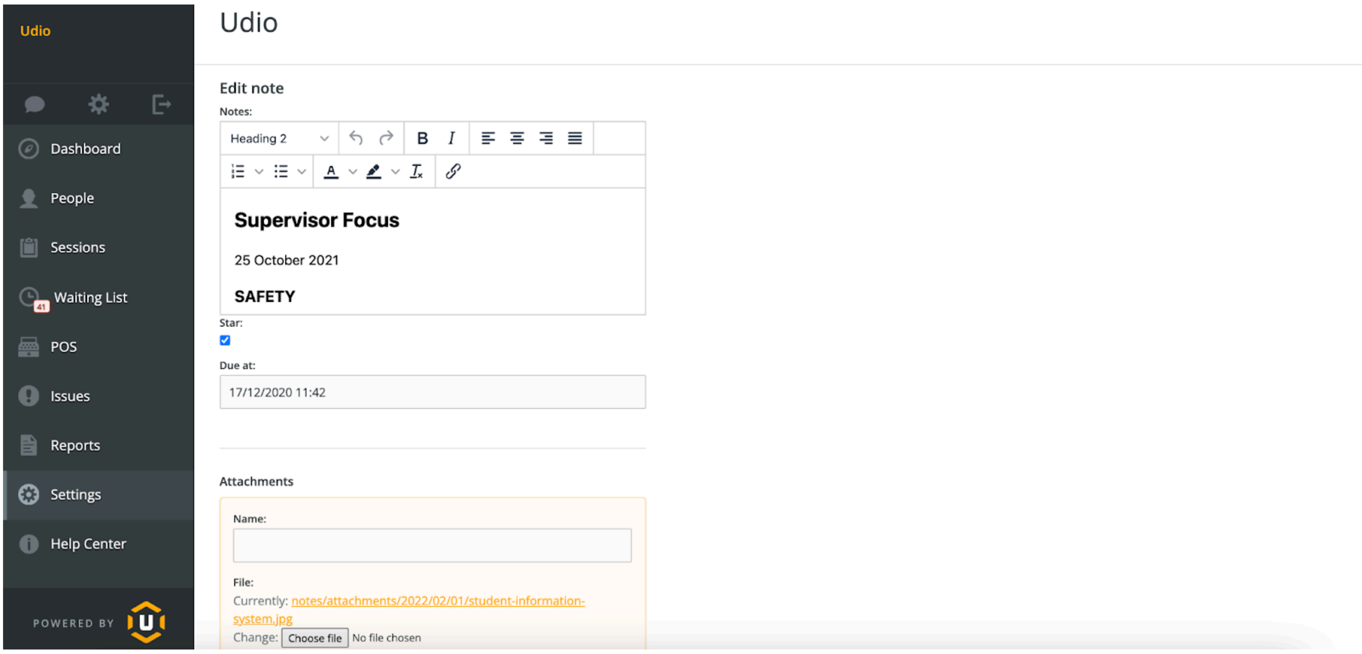
Please do not update any settings in here without consulting support@udiosystems.com

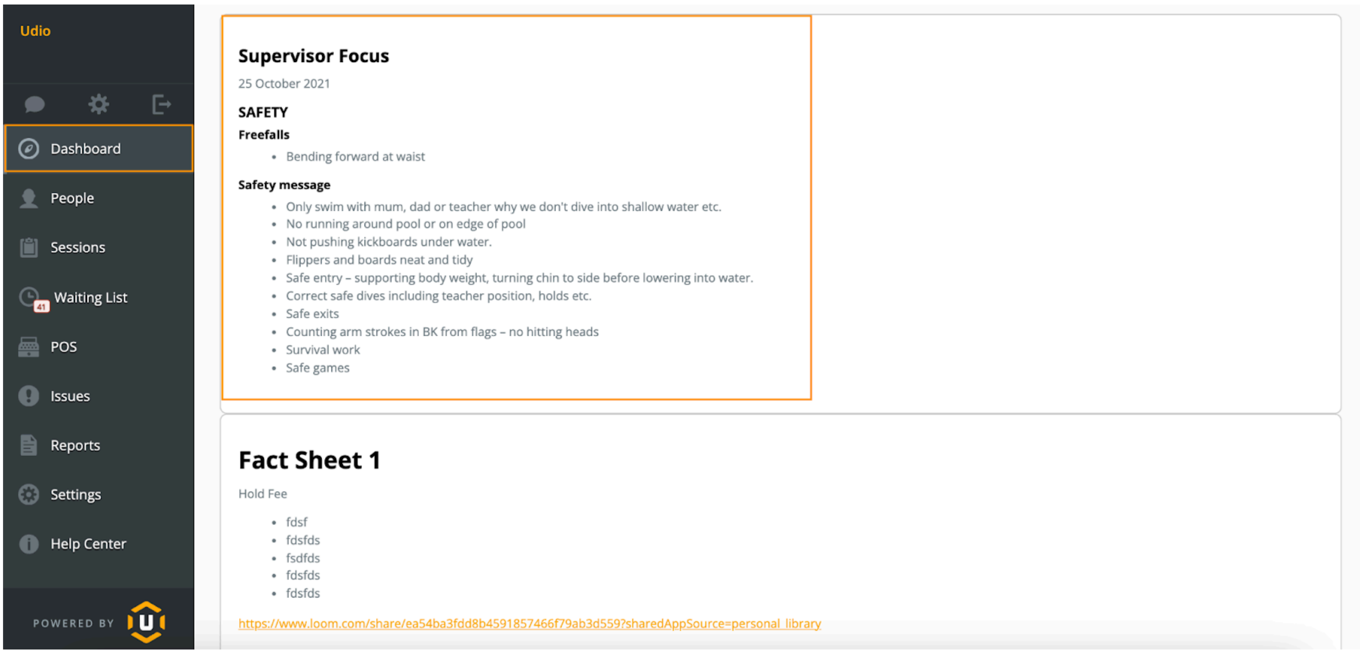
4.3 Edit Notes

Notes allow you to communicate with your staff at a company level. Any notes that are added here will appear on the Udio dashboard.

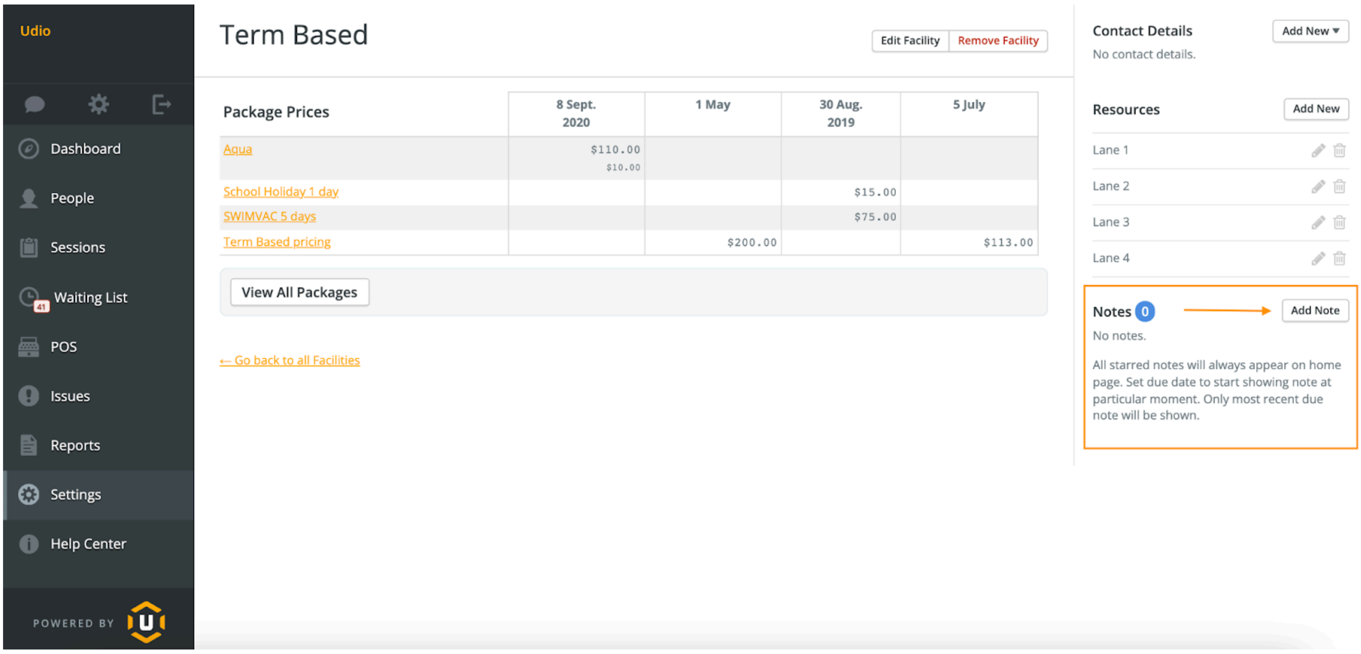
Notes can be set up in advance by adding a due at date and time. You can also add attachments. Click the pen icon in the right-hand corner of the note to edit.


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Help Center
POWERED BY
Supervisor Focus
25 October 2021
SAFETY
Freefalls
Bending forward at waist
Safety message
Only swim with mum, dad or teacher why we don't dive into shallow water etc.
No running around pool or on edge of pool
Not pushing kickboards under water.
Flippers and boards neat and tidy
Safe entry – supporting body weight, turning chin to side before lowering into water.
Correct safe dives including teacher position, holds etc.
Safe exits
Counting arm strokes in BK from flags – no hitting heads
Survival work
Safe games
student-information-system.jpg
due at 17/12/2020 11:42 AWST
created on 22/05/2014
Babies 1 Lesson Plan 01.03.21
fjkdsjfd
fjdskfjsdk
fjdskfjsd
jfdksjfs
due at 28/02/2021 16:00 AWST
created on 31/10/2017


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Help Center
POWERED BY
Udio
Edit note
Notes:
Heading 2
Supervisor Focus
25 October 2021
SAFETY
Star:
Due at:
17/12/2020 11:42
Attachments
Name:
File:
Currently: notes/attachments/2022/02/01/student-information-system.jpg
Change: Choose file No file chosen



If you want to communicate with staff at one facility, go to *'Configure facilities'* in Settings, select the facility and click *'Add Note'* on the right-hand side.



4.4 Website Widgets & Scripts

Udio provides some special URLs and scripts to include in your website. Follow the instructions provided in this section or forward them to your website management team.

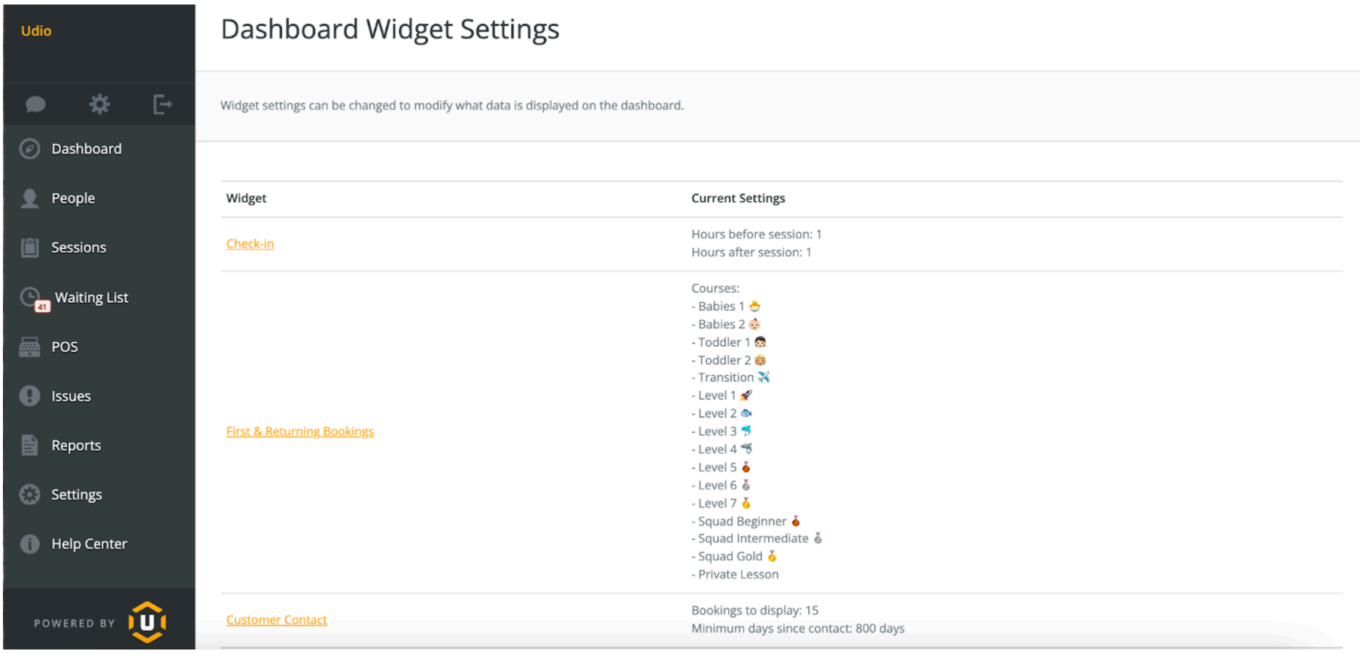
You can have both images and text. Images will appear on the left-hand side and text on the right. The text can have headings as well as body text. All images need to be 1080 x 1080 in .jpg format.

4.5 Dashboard Widgets Configurations

You can change widget settings to modify what data is displayed on the dashboard.

- Check-in – hours before and hours after each session

- First & Returning Bookings – select the courses you wish to see on the *New, Leaving and Returning Customers* widget
- Customer Contacts – select number of bookings to display on the dashboard at any one time and minimum days since last contact



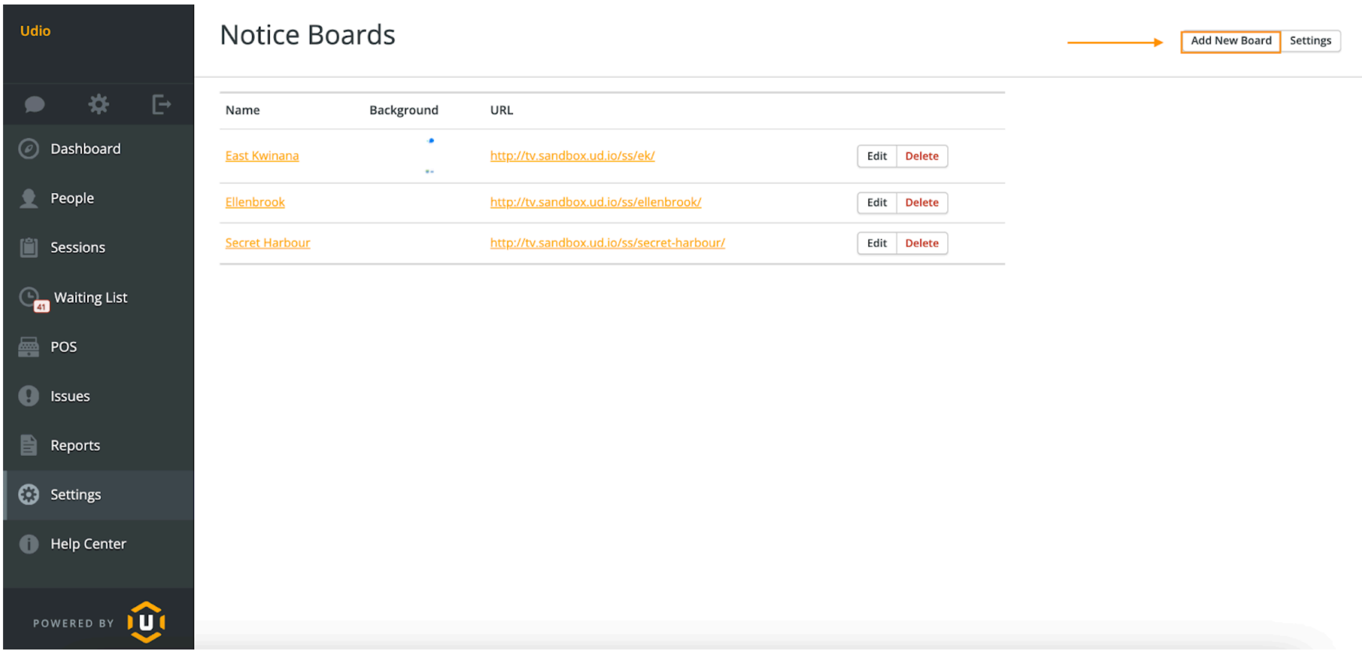
4.6 TV Notice Boards

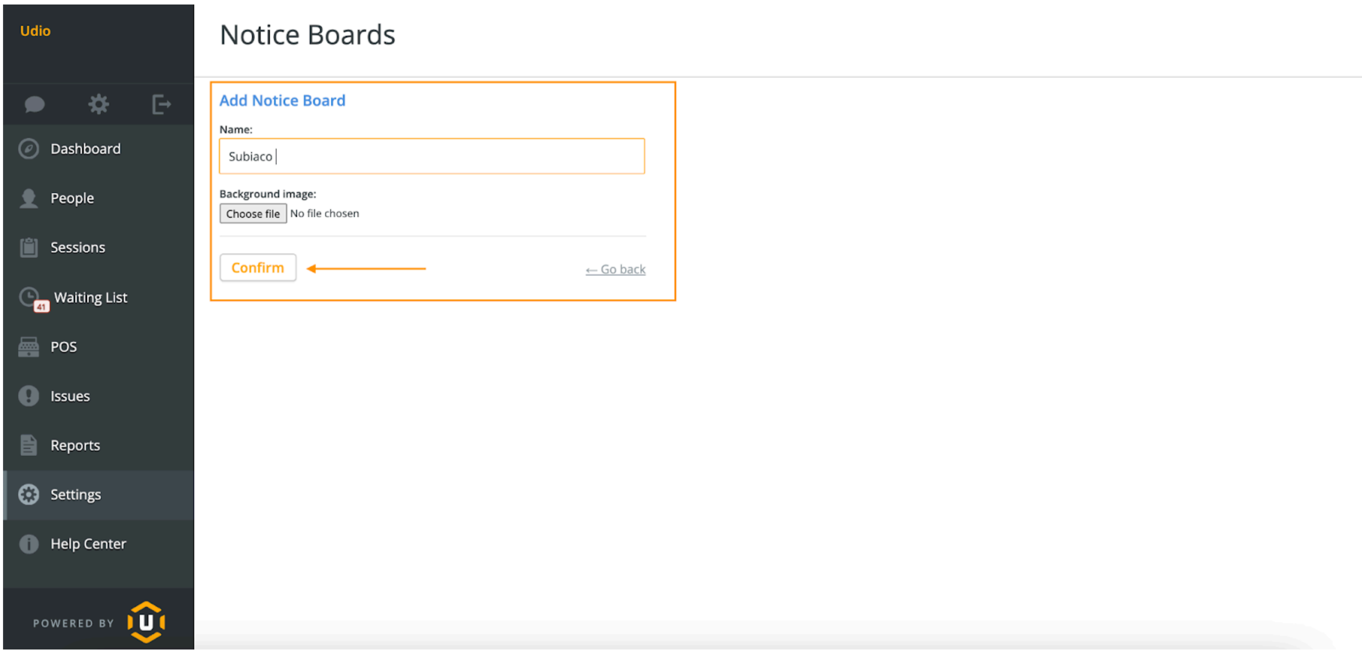
Noticeboards allow you to run a series of notices on a smart TV or tablet.

You can add a logo to the bottom right-hand side and we can provide the white background (please email hello@udiosystems.com). You may need to play with the size of the logo to see what looks best. Uploaded photos need to be 1080 x 1080. You will need a photo editor to complete this.

4.6.1 Add New Board

- Click on *'Add New Board*
- Name your board (you can have a board for each of your facilities)
- Click *'Choose file'* to upload your background
- Click *'Confirm'*

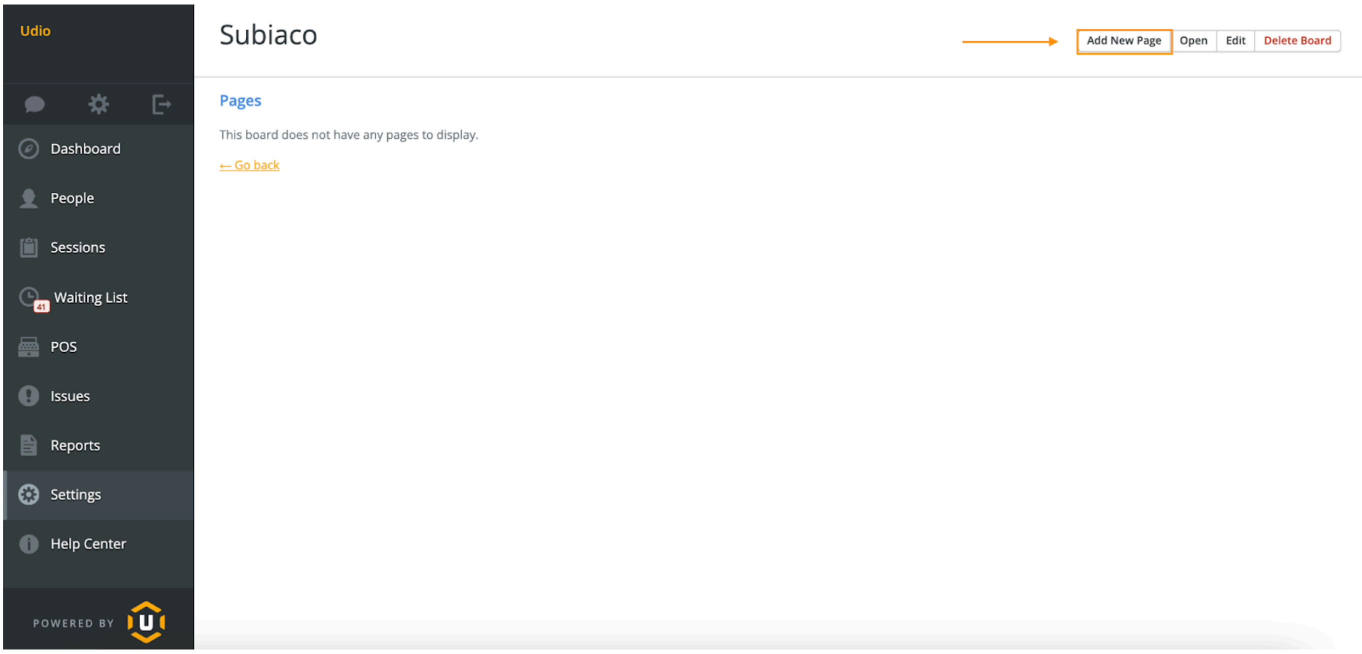


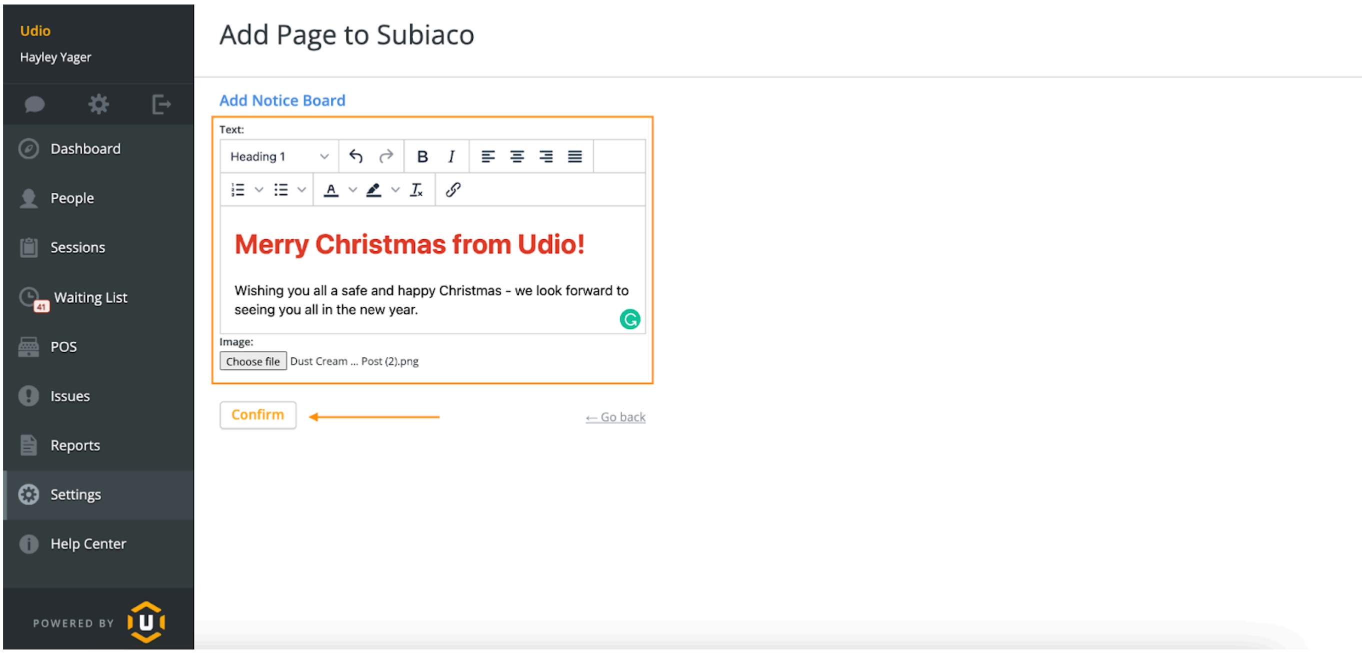


4.6.2 Add New Page

Once you've confirmed your new board, you will be directed to the next screen which allows you to create multiple pages per board.

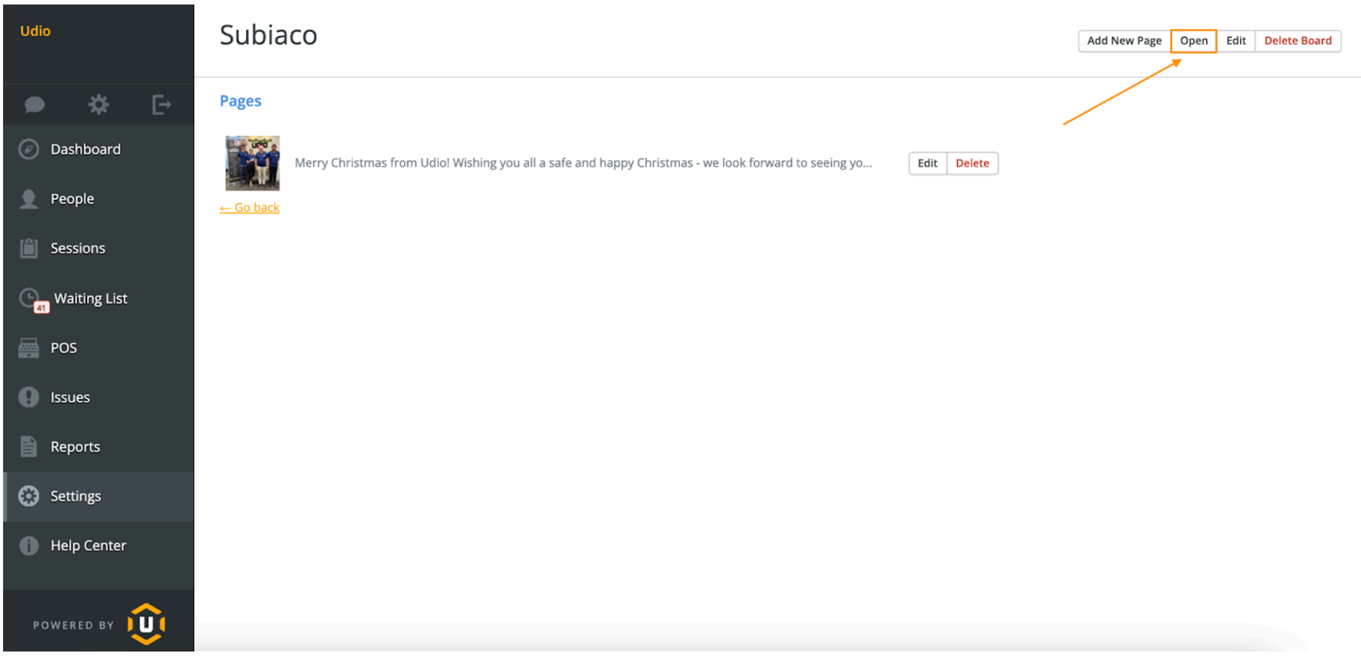
- Click *'Add New Page'*
- Enter the text and choose the image
- Click *'Confirm'*
- Repeat for all the pages you require





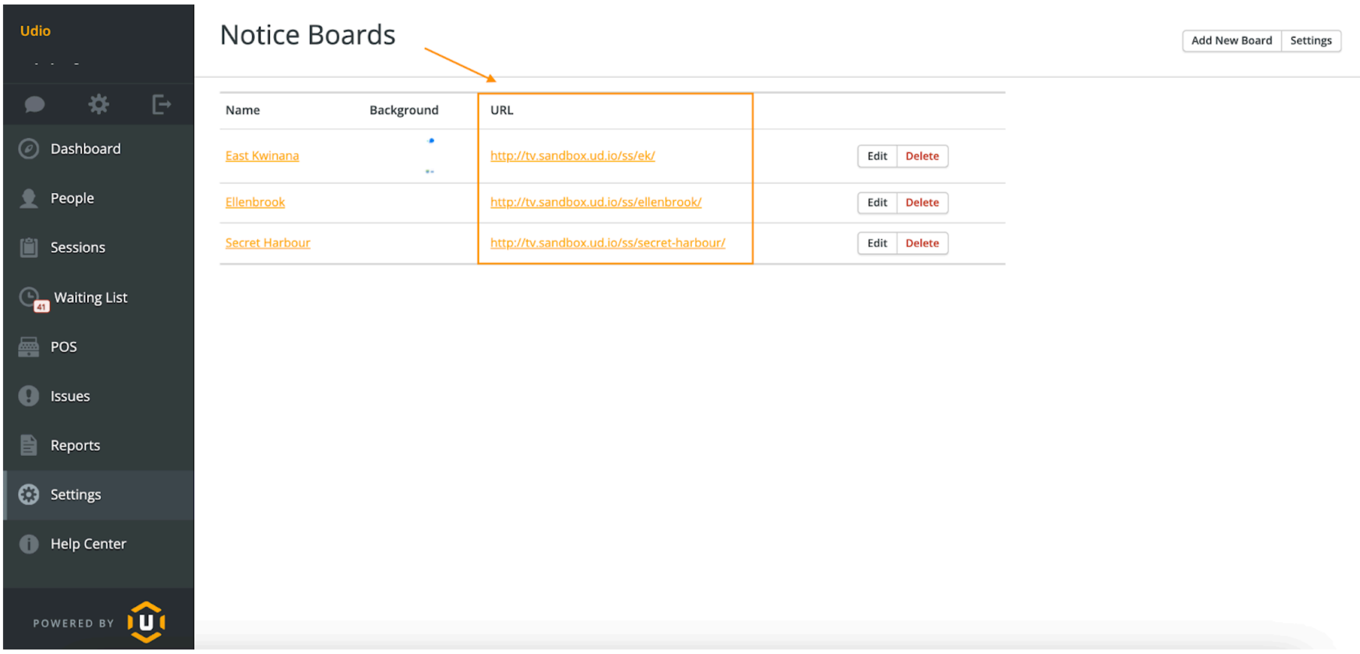
4.6.3 Open the board to view

- On the notice board page, click *'Open'* in the top right corner
- The pages will then scroll through



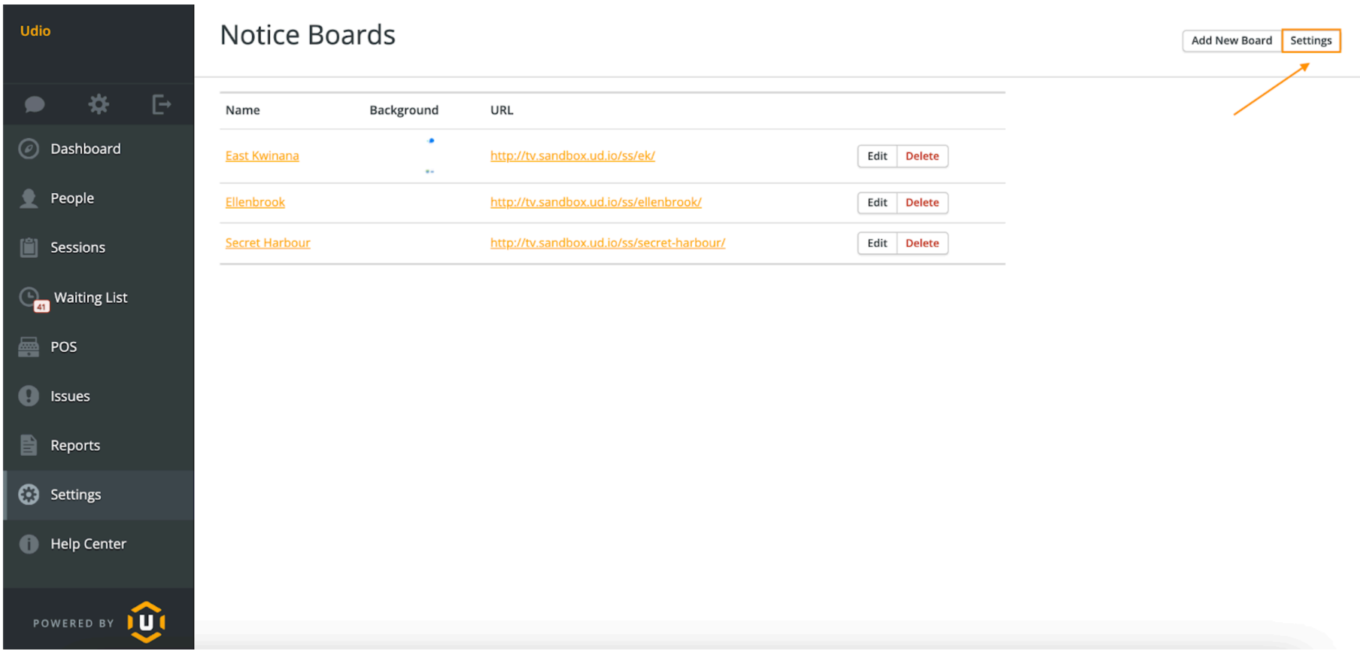
4.6.4 Loading into a webpage on TV or tablet

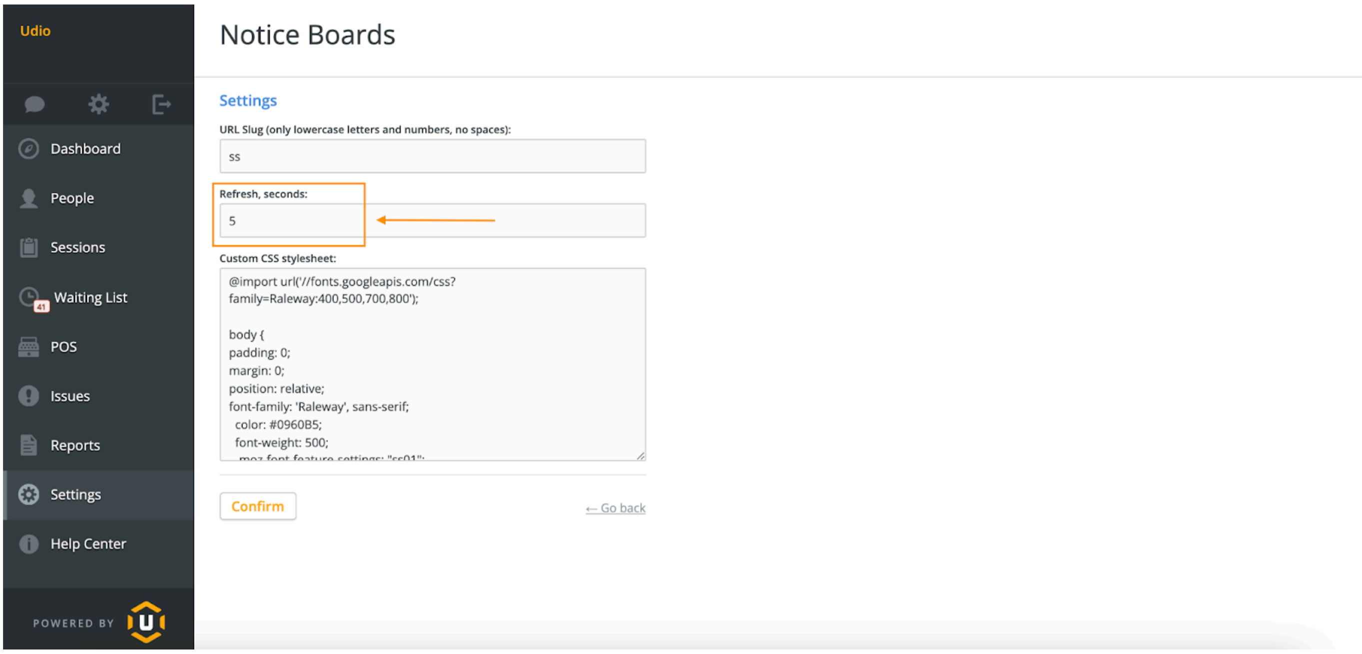
Simply enter the URL listed on the facility notice boards page into your web browser.



4.6.5 Change the scroll time of the pages

- Go to *'Settings'* on the main page of the notice boards
- Update the *'Refresh, seconds'* field
- Click *'Confirm'*





4.7 Account Access

Udio has IP Address Access Control, please contact support@udiosystems.com before updating

- ## 4.8. Users

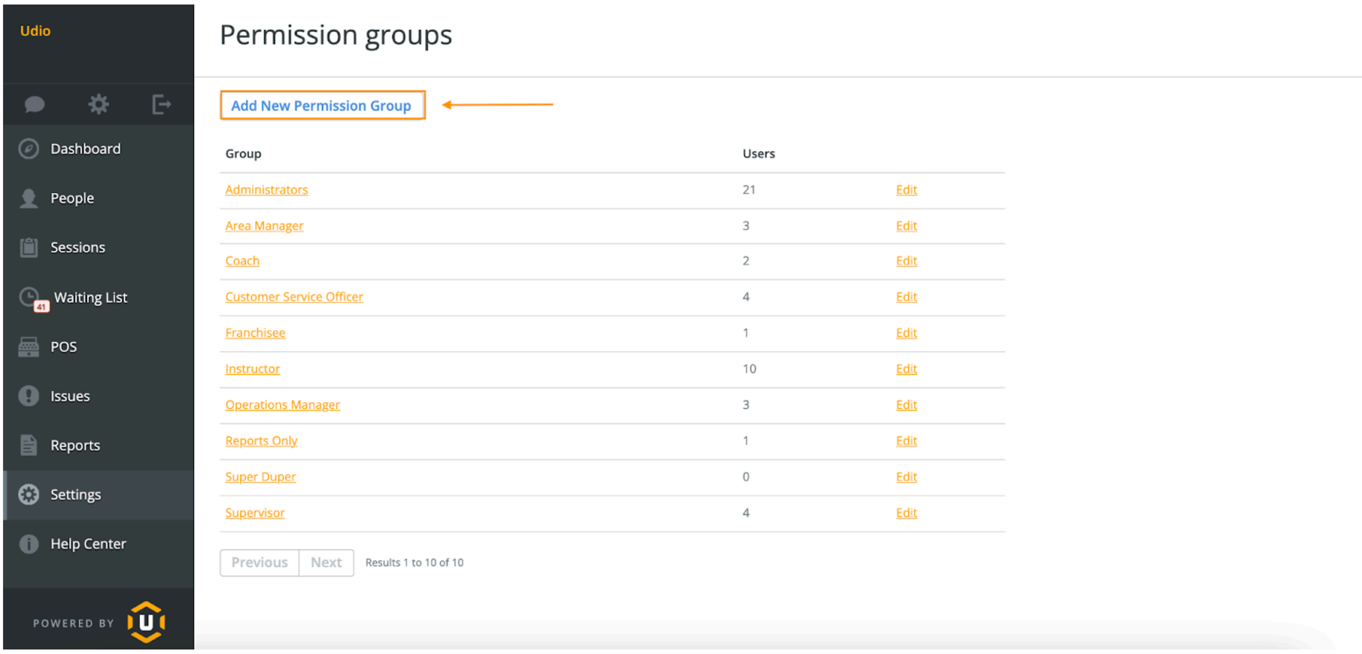
In this section, you can configure different access for your users, as well as view who has (or has had) access and at what level.

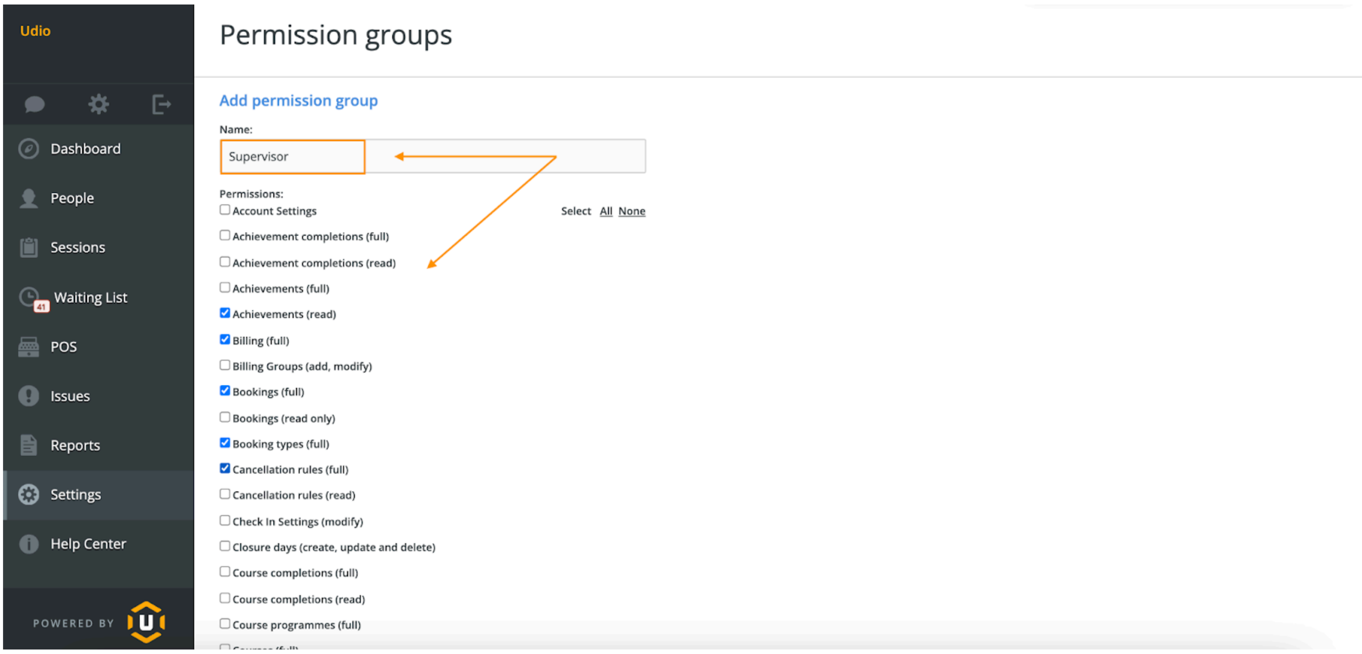
To help with a faster setup, we've pre-populated this section with some data.

4.8.1 Configure login permission groups

4.8.1.1 Add New Permission Group

- Click on *'Configure login permission groups'* under 'Users'
- Select *'Add New Permission Group'*
- Add a name and select the permissions you want that level to have
- Click on *'Confirm'* to save the changes





4.8.2 List users

Under *'List users'* you can see who is active or inactive and which group they belong to.

- ## 4.9 Initial Setup

Before updating either setup mode of import person date, please contact support@udiosystems.com

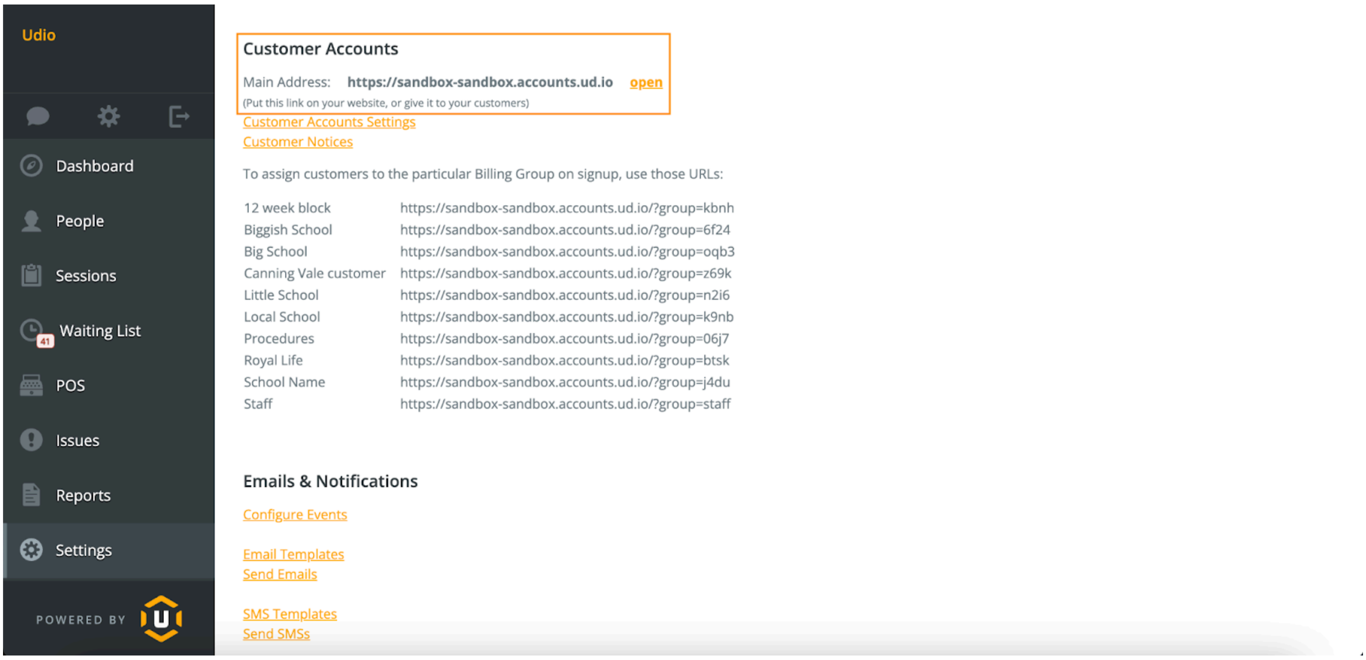
5. Customer Accounts

Udio's customer accounts module (or customer portal) allows your customers to login and 'control' their account. They can perform a number of tasks (should you grant permission), including:

- View bookings

- Cancel a lesson
- Book a make up
- Book into a school holiday programme
- Move a booking (time and day or time, day and level with a course completion)
- Set up a direct debit
- Track their child's progress
- View personal best results
- Update their contact details and view/update their health issues
- View notices
- View your businesses Facebook feed

With customer accounts, you can also allow your customers to book online via a URL that you can add to your website. The URL (directly linked under customer accounts) is created by Udio but can be changed.



This is a true online booking and not a form that is submitted. Upon confirmation, the customer will receive all the welcome emails associated with a new booking.

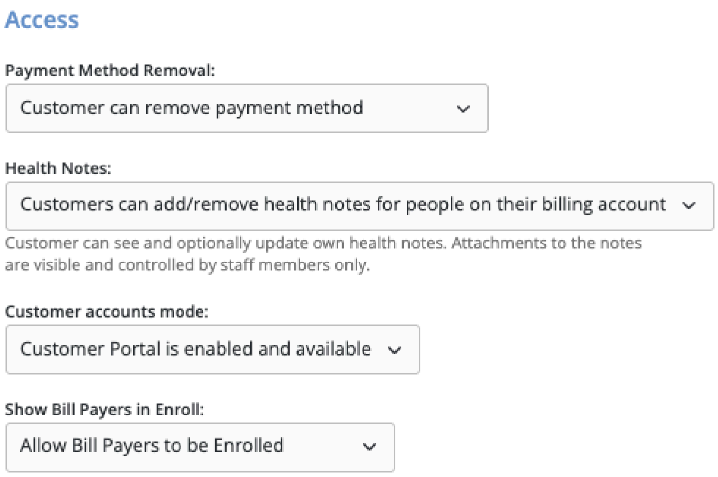
To do this, you will need to update your courses in the online booking information section.

5.1 Customer Accounts Settings

There are a number of fields that you need to complete for your business:

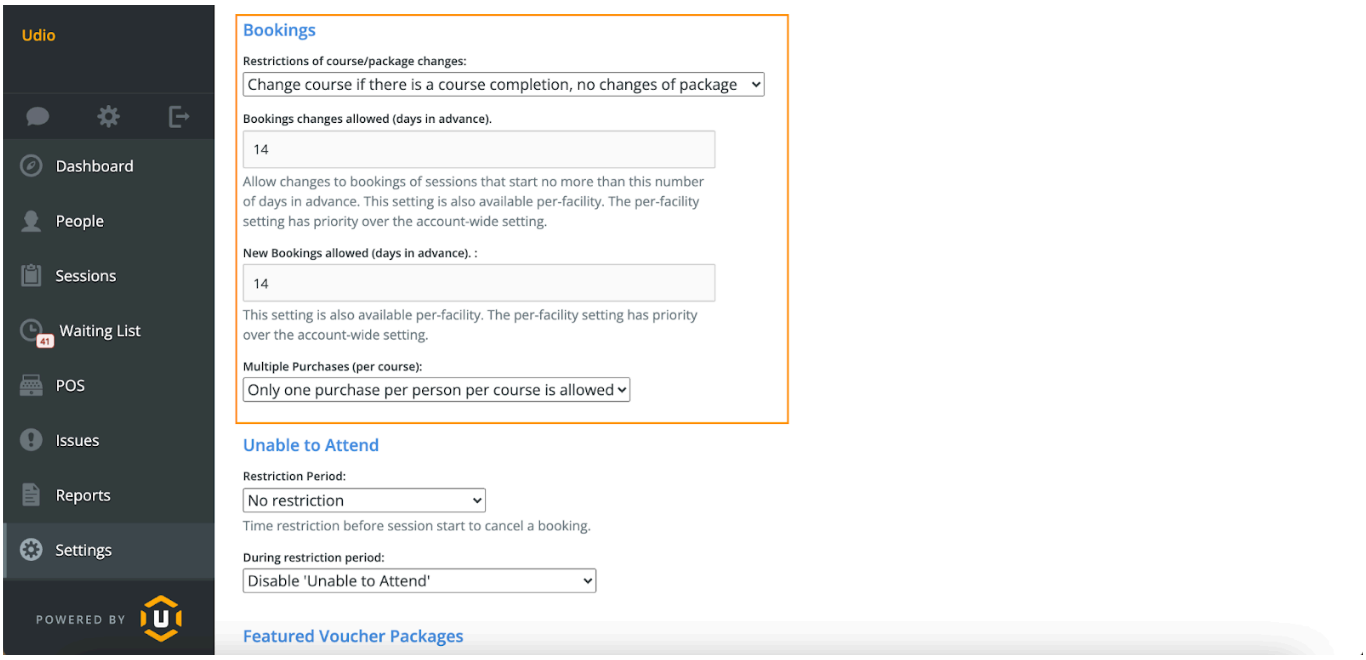
5.1.1 Access

- Select if you want a customer to be able to remove their payment method or not
- Select if you want a customer to be able to add/remove their health issues
- Select if you want a customer to be able to view the Portal
- Select if you do or don't want Bill Payers to be visible on the Portal



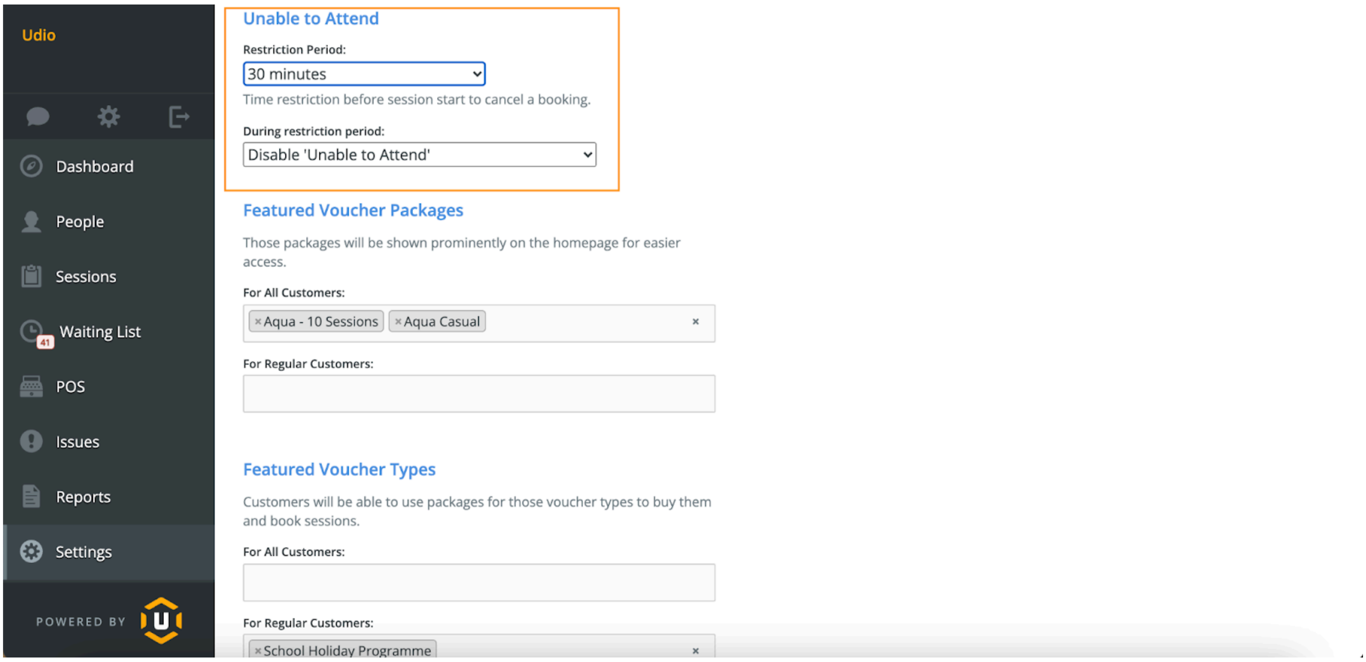
5.1.2 Bookings

- Restrictions of course/package changes – update if you want customers to be able to make changes to their bookings
- Bookings changes allowed (days in advance) – select the number of days your customers can book in advance, such as make ups
- New bookings allowed (days in advance) – select the number of days in advance a new or returning customer can book in
- Multiple purchases (per course) – update if you want the customer to be able to have multiple courses for the same person



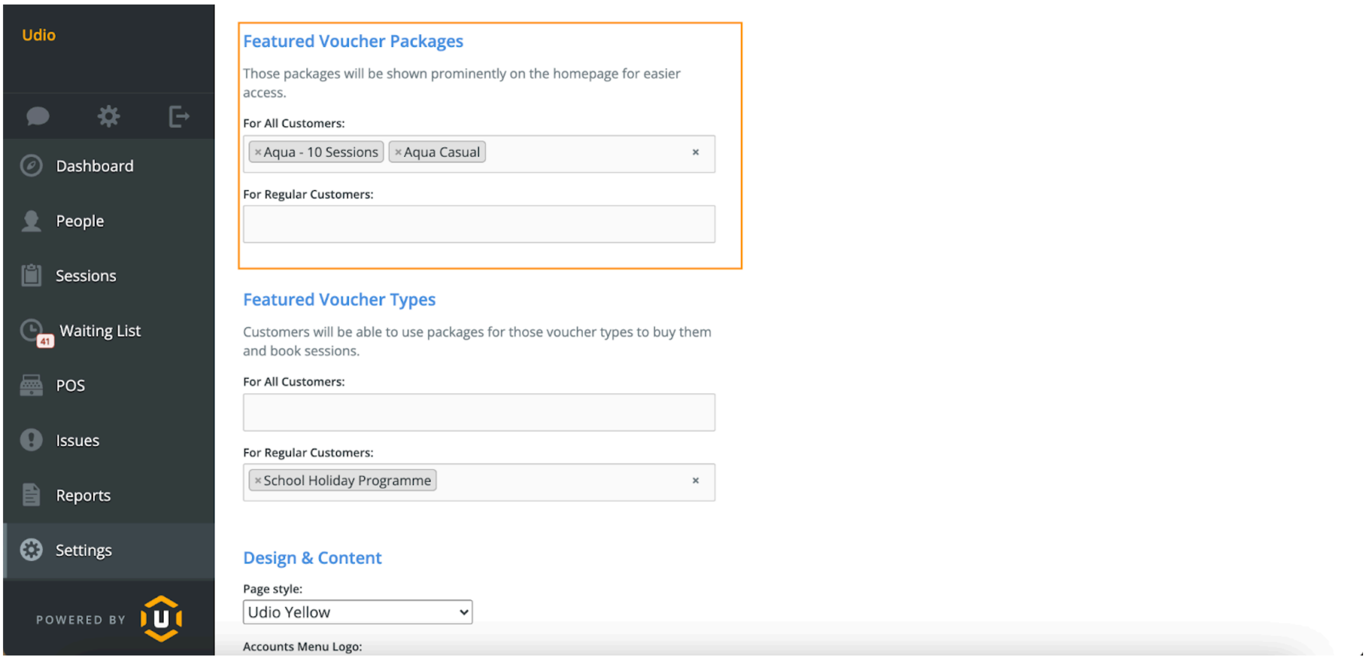
5.1.3 Unable to Attend

- You might want to add some restrictions for your customers to cancel a lesson and click 'unable to attend'



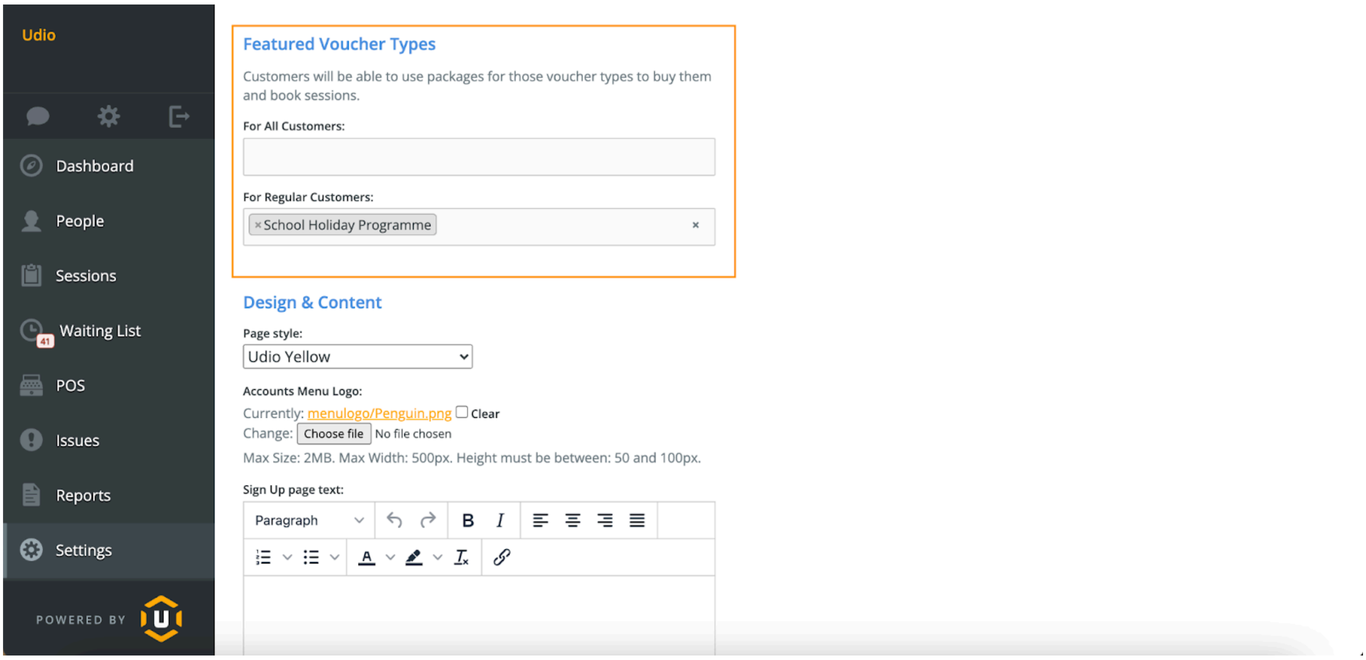
5.1.4 Featured Voucher Packages

- This displays your voucher packages, such as lap swimming or aqua
- Select the appropriate voucher type



5.1.5 Featured Voucher Types

- You can display voucher types, such as school holiday programs on the customer accounts dashboard page
- Select the appropriate voucher type (this can be for all customers (new and existing) or just regular customers

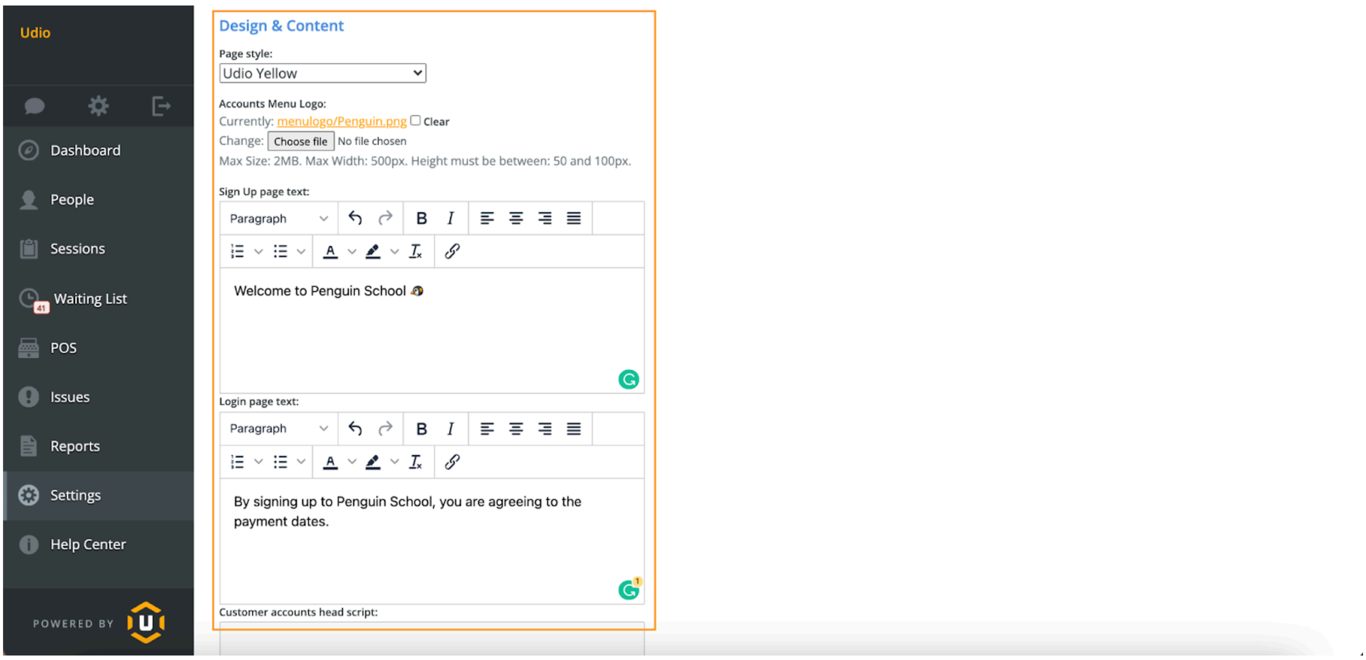


5.1.5 Featured Voucher Packages for sale

- Select packages that will be available for purchase in the Portal / App

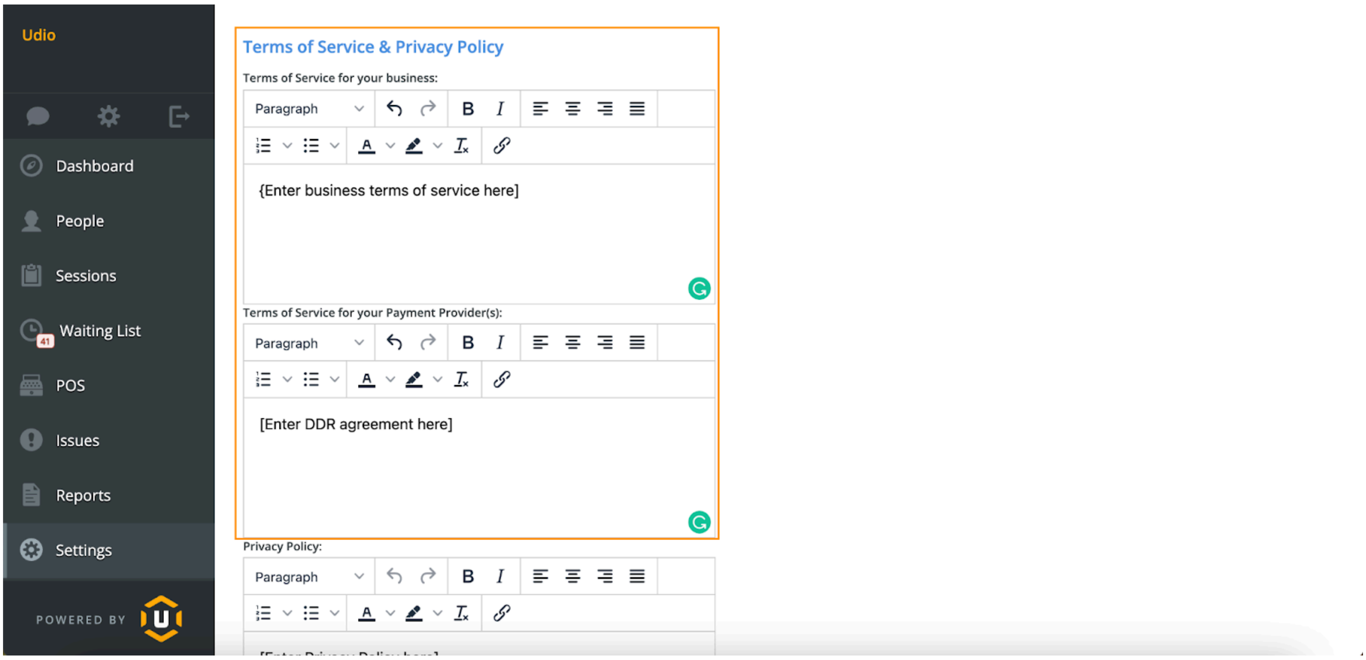
5.1.6 Design & Content

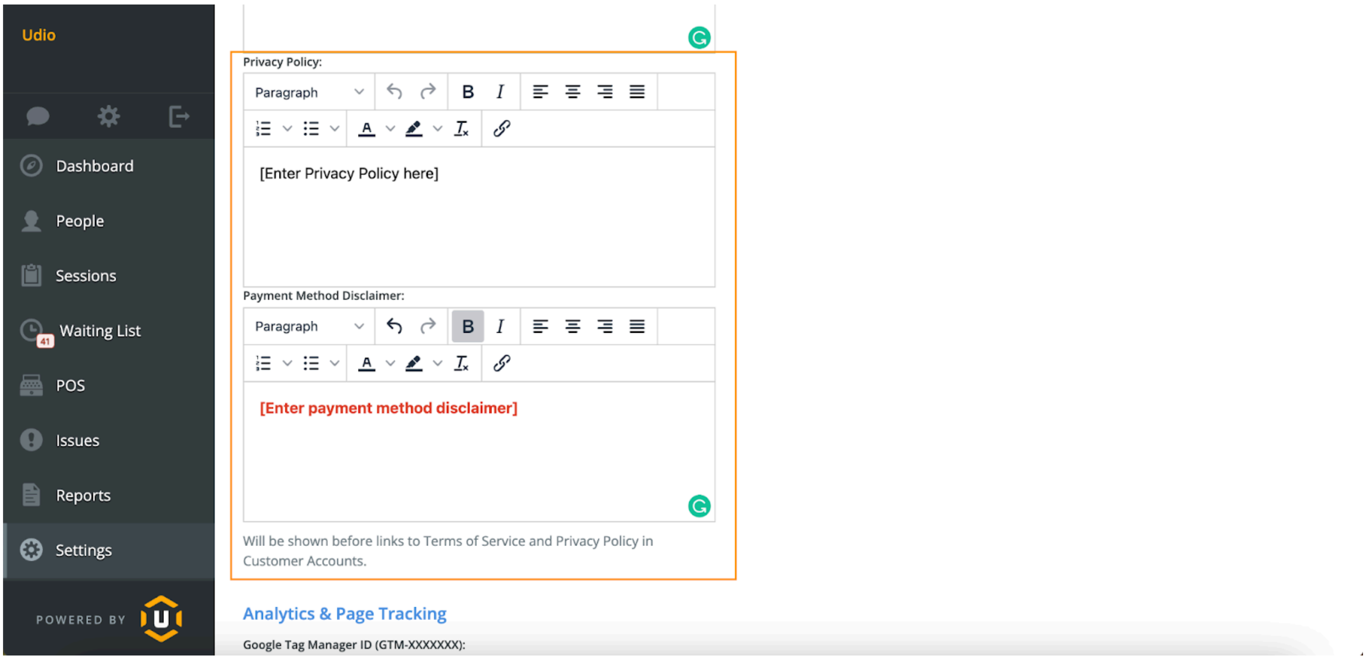
- Select your page style (the colour that will show on the sign up/login page and the top banner where the tabs are located)
- You can also upload your logo (please note the size required) which will appear on the top right-hand side of customer accounts
- Add sign up text to communicate with your customers on the sign up page
- Add login page text to communicate with your customers on the login page (this text will appear in the grey box underneath the login fields)
- Contact your web developer if you want to add head script - this allows you to add your own code into the tag on every page of customer accounts



5.1.7 Terms of Service & Privacy Policy

- Add your terms of services, both for your business and payment provider if using, as well as your privacy policy
- There is also a field to add a payment method disclaimer if you wish to
- This information is displayed on your customer portal sign up/sign in page and when your customer is entering their direct debit details

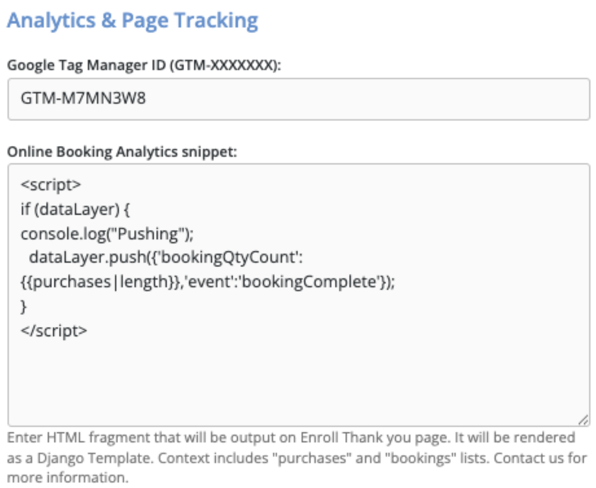




5.1.8 Analytics & Page Tracking

- With a Google Tag Manager ID, you can track visits to your customer portal through Google Analytics (please refer to Google Analytics documentation on how to achieve this); this tag will be present on all customer portal pages

- The online booking analytics snippet is the script included in the booking summary page that shows once online enrolment is complete (please refer to Google's help materials on how to set up analytics script)

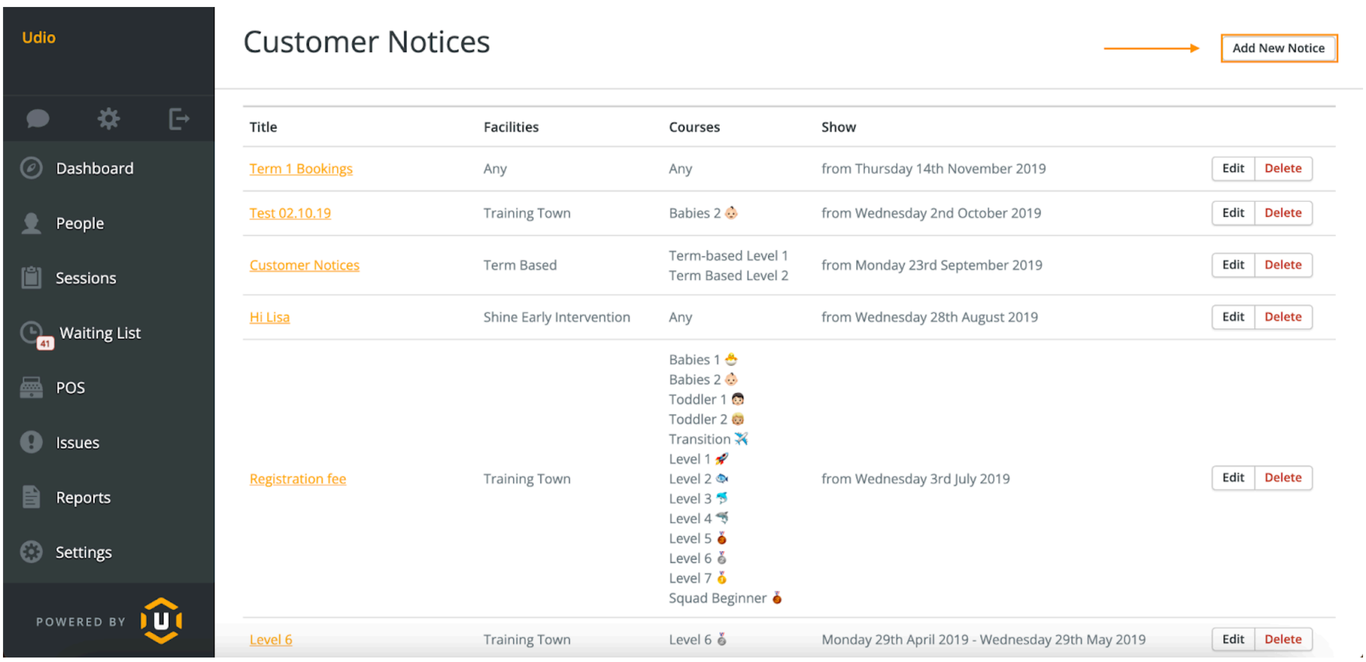


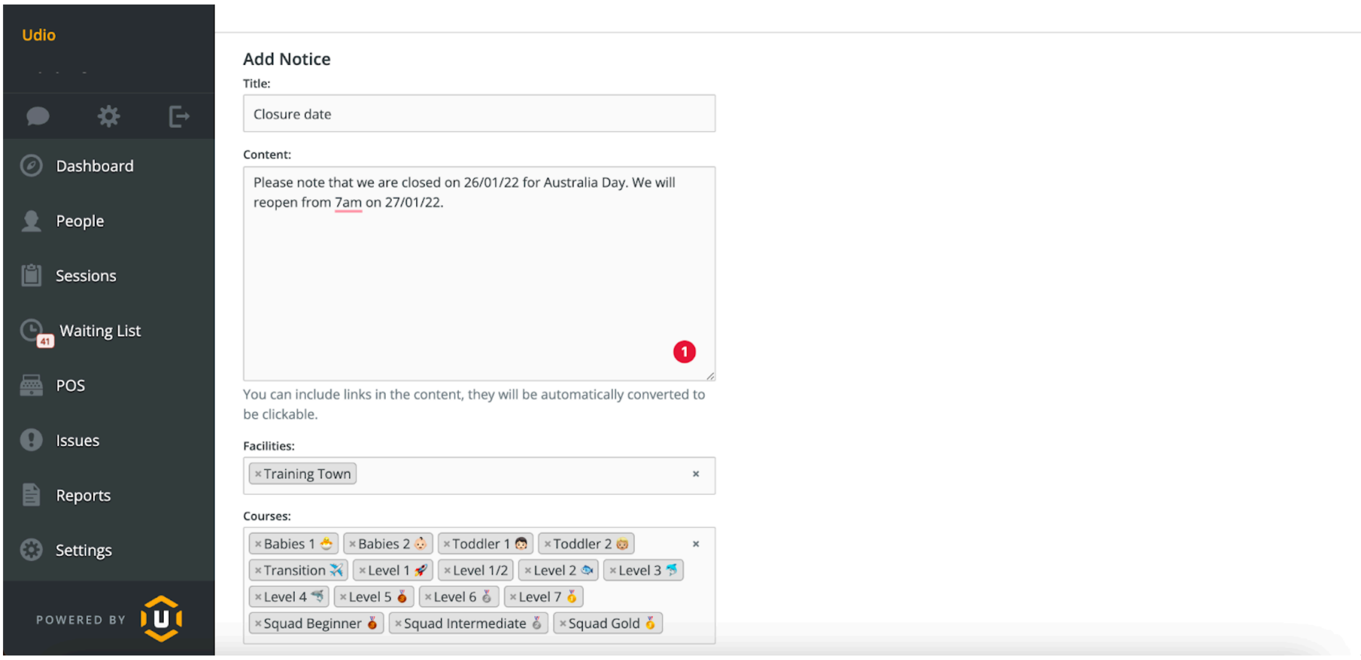
5.2 Customer Notices

You can communicate information to your customers via notices in the portal. Notices sit at the top of the page on the dashboard/landing page. You can target notices by facility and courses.

5.2.1 Add a notice

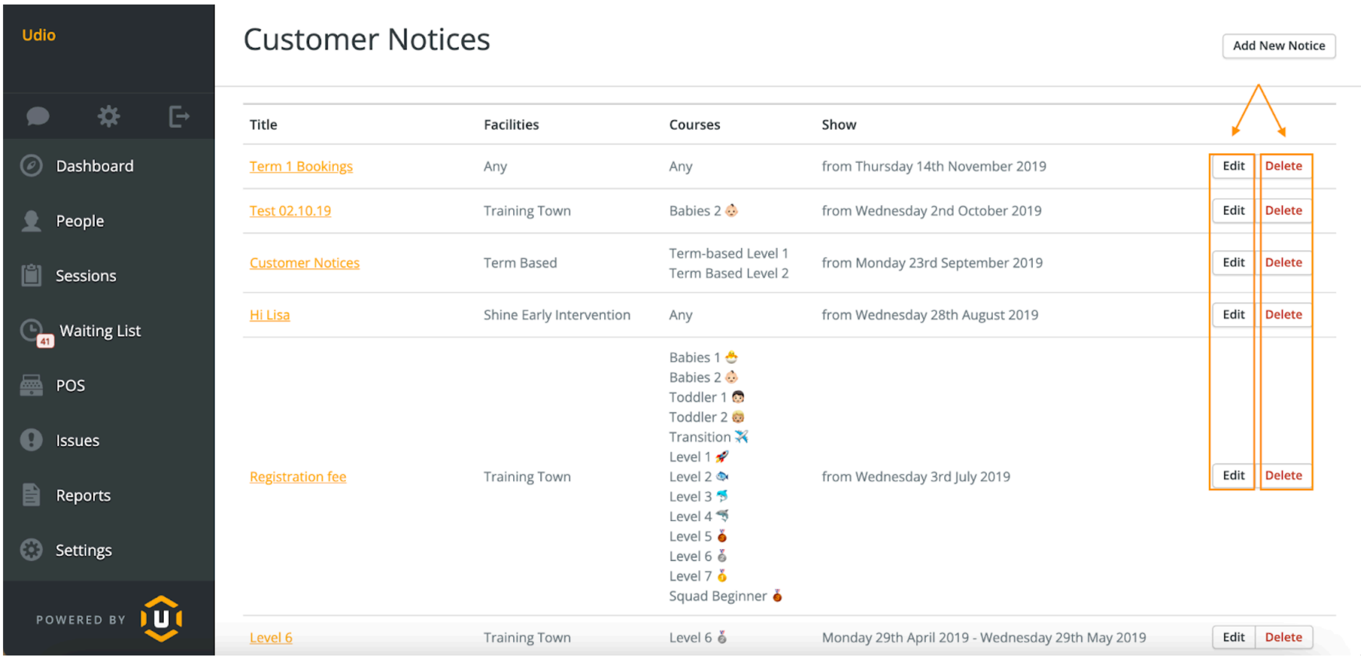
- Select *'Add New Notice'* in the top right corner
- Add a title and content, along with the appropriate facilities, courses, start date and end date
- Include an optional attachment for customers to download
- Click *'Confirm'*





5.2.2 Edit a notice

- Tap *'Edit'* to any notice to make changes, or *'Delete'* to permanently remove a notice



6. Scheduling

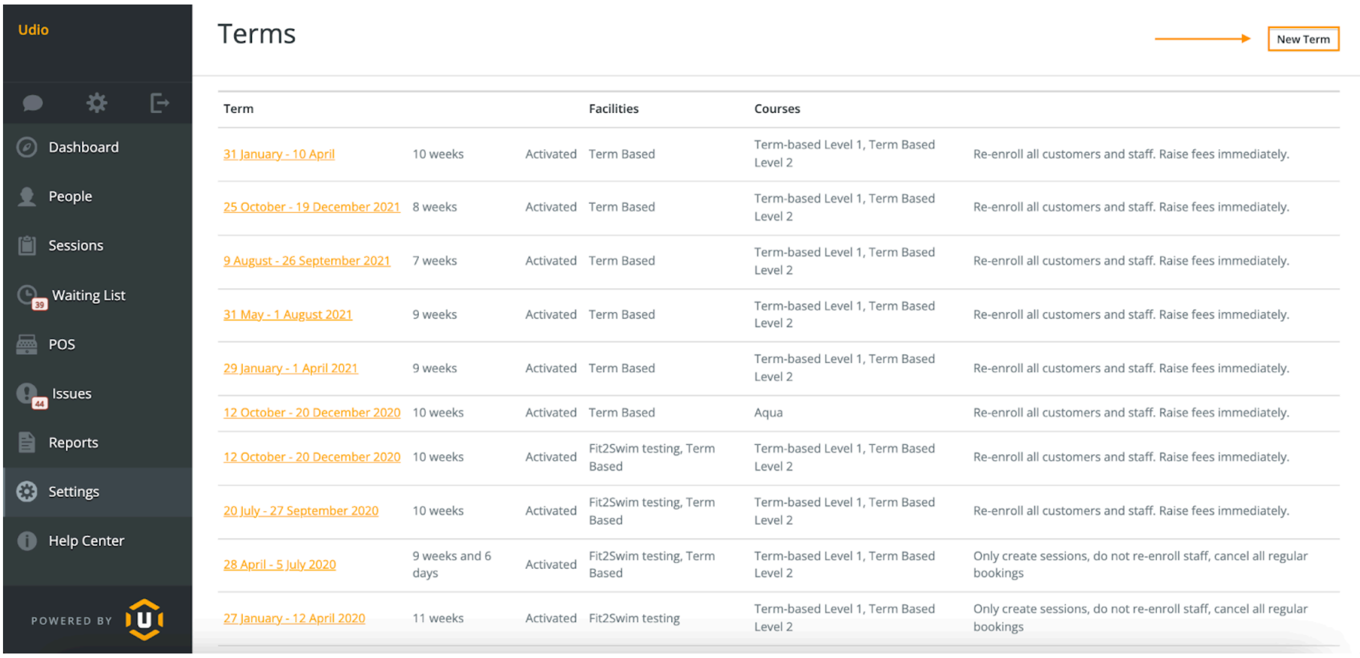
6.1 Terms

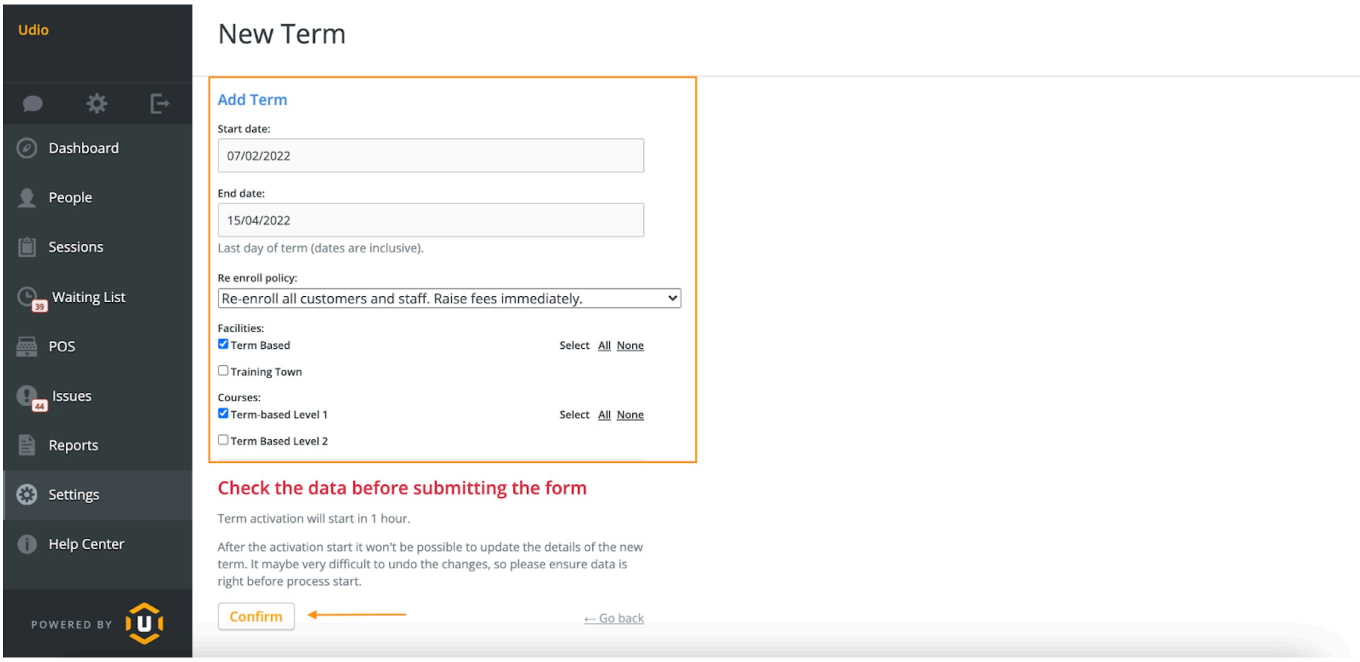
Terms are only used for term-based programs. If your business is perpetual, please skip this section.

To add a new term:

- Click on *'Terms'* followed by *'New Term'*

- Enter the start and end date of the term
- Select the re-enrol policy, facilities and courses
- Click *'Confirm'*





Prior to each term, you will create the new term; depending on what you've set up for re-enrolment, your sessions and/or customers will be duplicated into the new term.

Please note: when you create the new term, the invoices will be raised and if your business has direct debit, the outstanding invoices will be 'paid' within 6 hours.

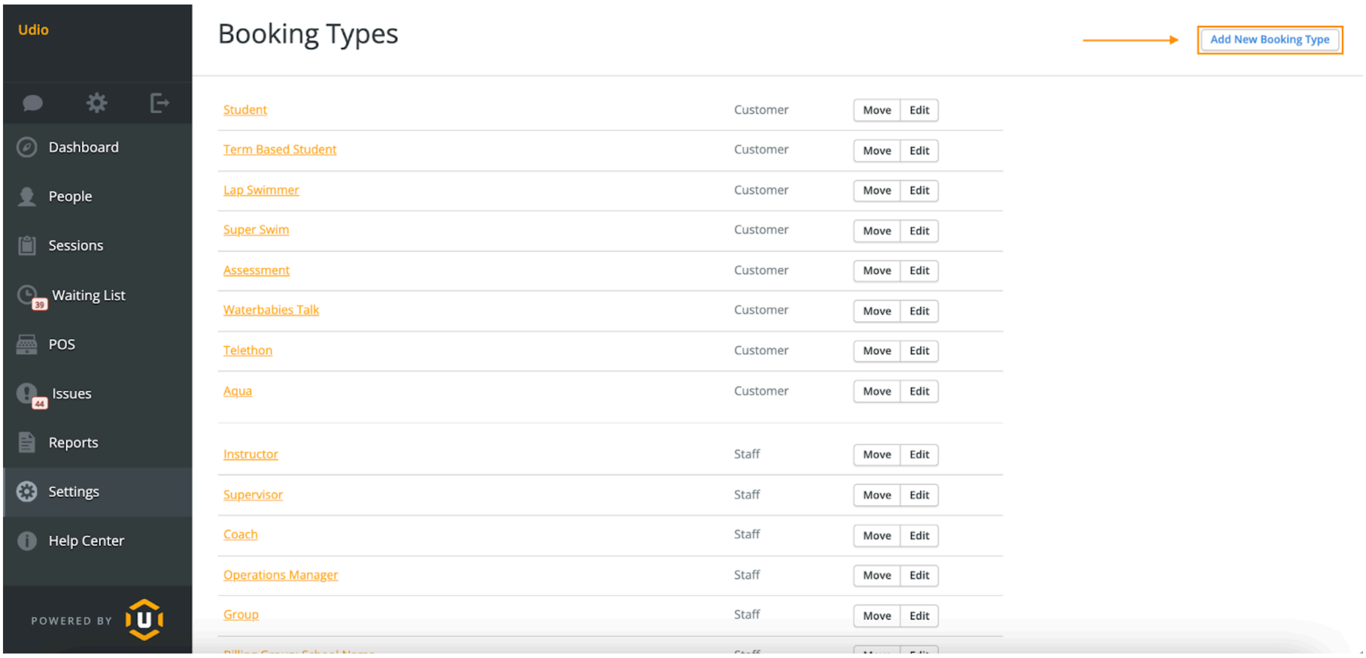
6.2 Configure booking types

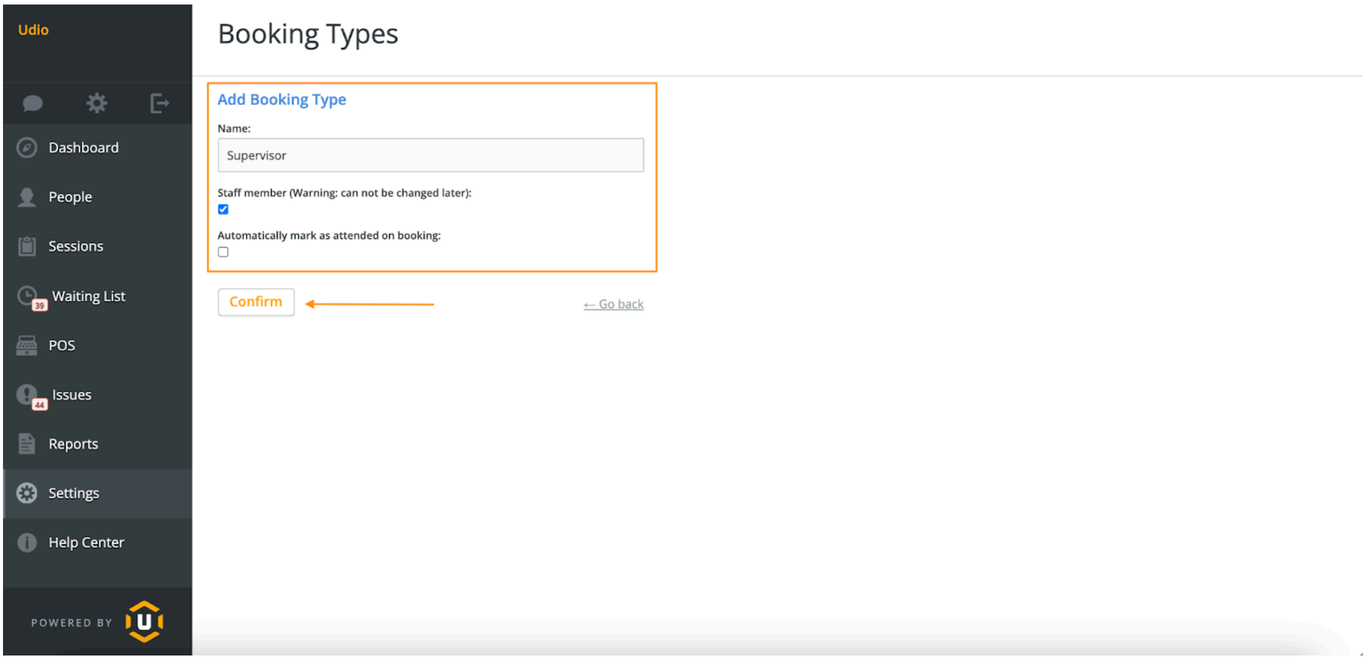
A booking type may be a student, teacher, coach, manager on duty, etc and you have the flexibility to add/edit these different types.

6.2.1 Add a new booking type

- Click on *'Configure booking types'* and select *'Add New Booking Type'*

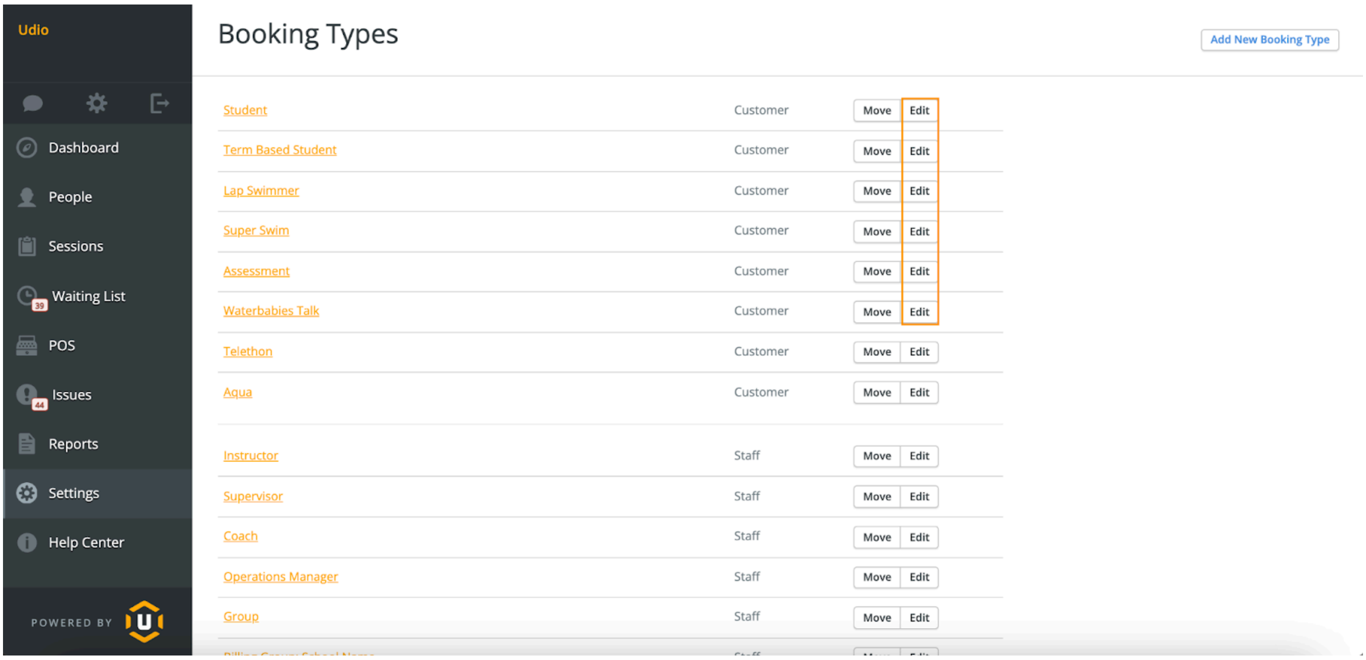
- Add the name
- Tick if this booking is for staff members and if you want to mark as attended on booking (generally, this is for recreational bookings)
- Click *'Confirm'*





6.2.2 Edit a booking type

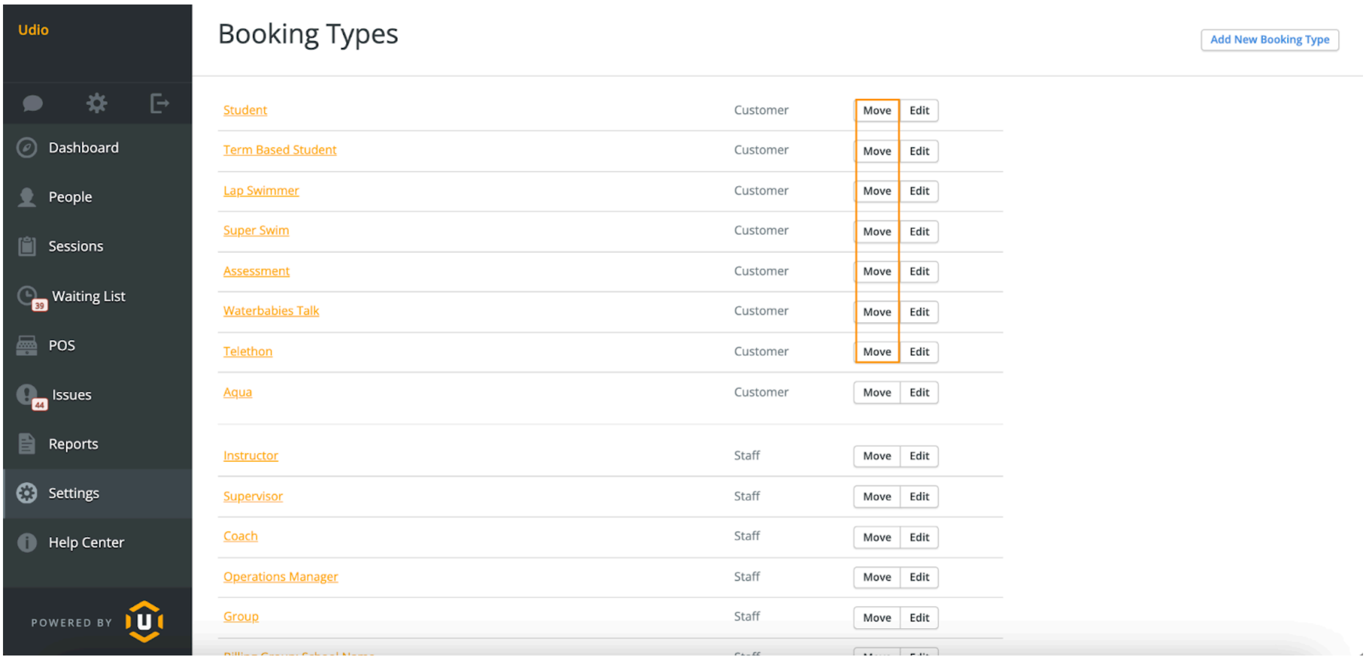
- Click on *'Edit'* and make the necessary changes
- Click *'Confirm'*



6.2.3 Move a booking type

If you want to rearrange the booking types, simply:

- Click and hold the *'Move'* button
- Move the booking type to where you want it to be



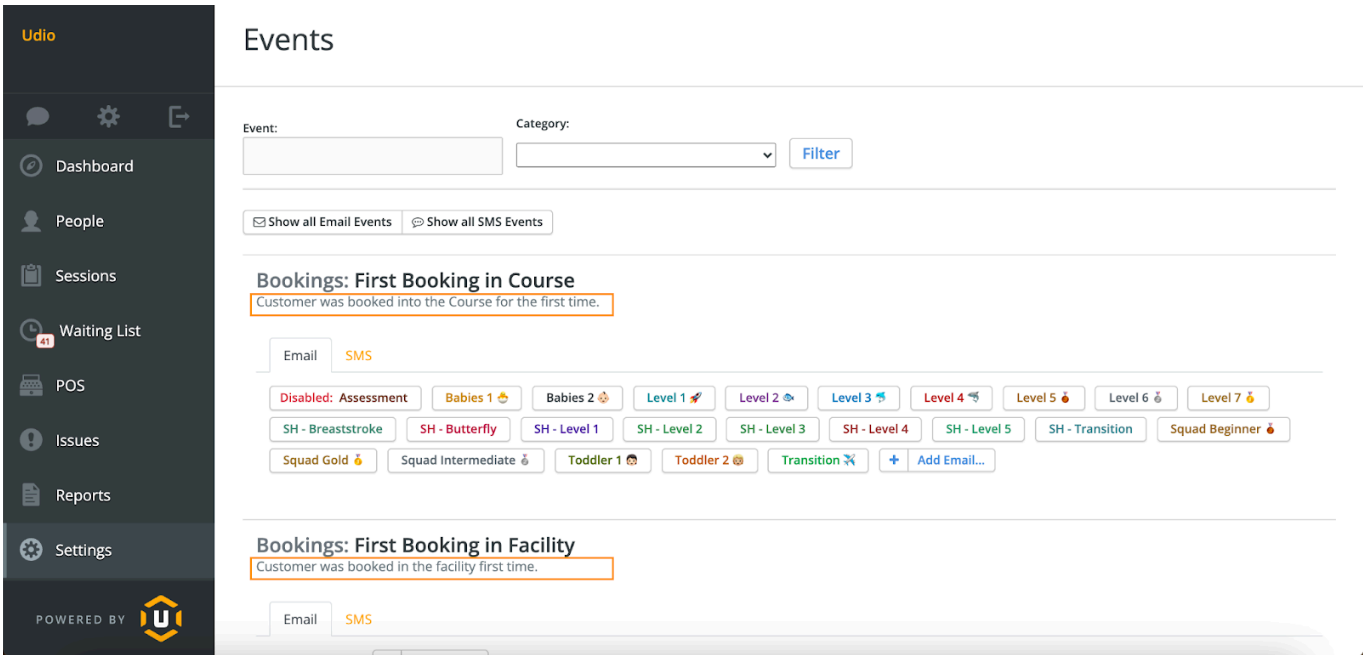
7. Emails & Notifications

Udio's inbuilt email system allows you to set up multiple email and SMS templates that will automatically trigger for certain events. You can also send out specific emails and texts to a select group of people.

We've dedicated a whole training guide to setting up, sending and tracking email and SMS notifications - you can [access it here](#).

7.1 Configure Events

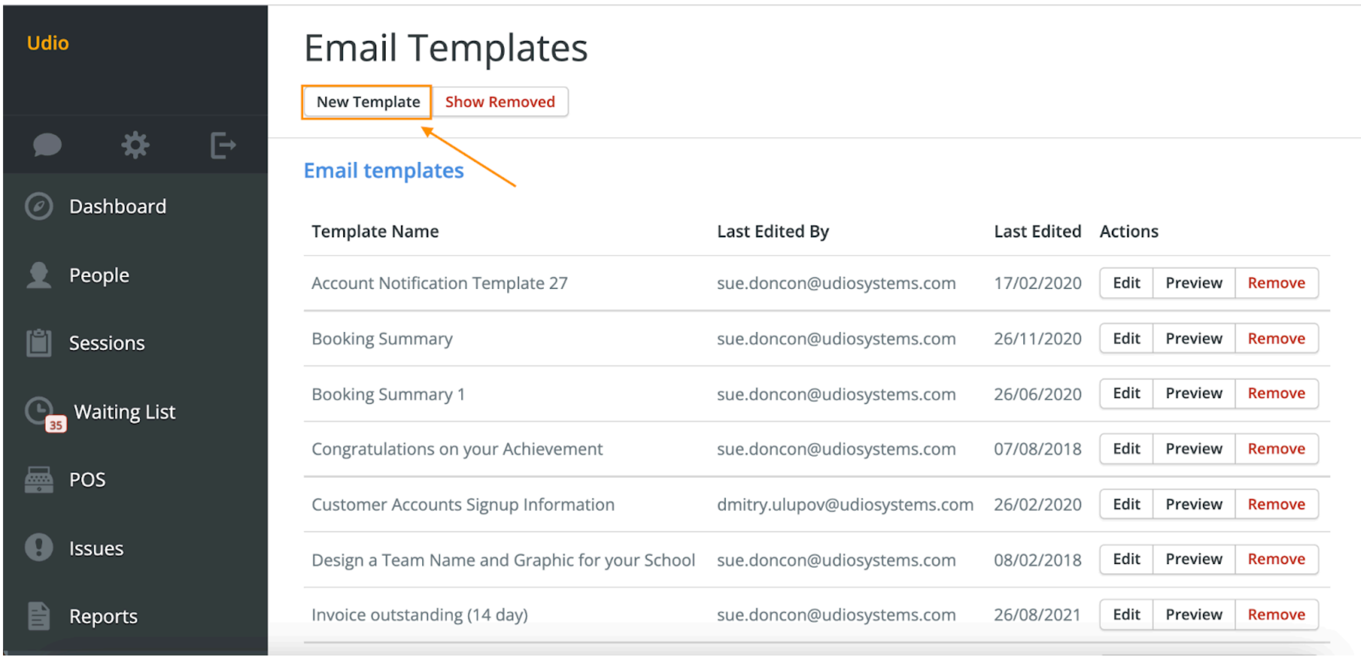
Udio has many different events that can trigger an email to the customer; it then records the event activity on the ‘people’ page or ‘activity report’. You can create emails for all or some of these events, and separate ones for different facilities, such as the welcome email. Each trigger includes a short description.

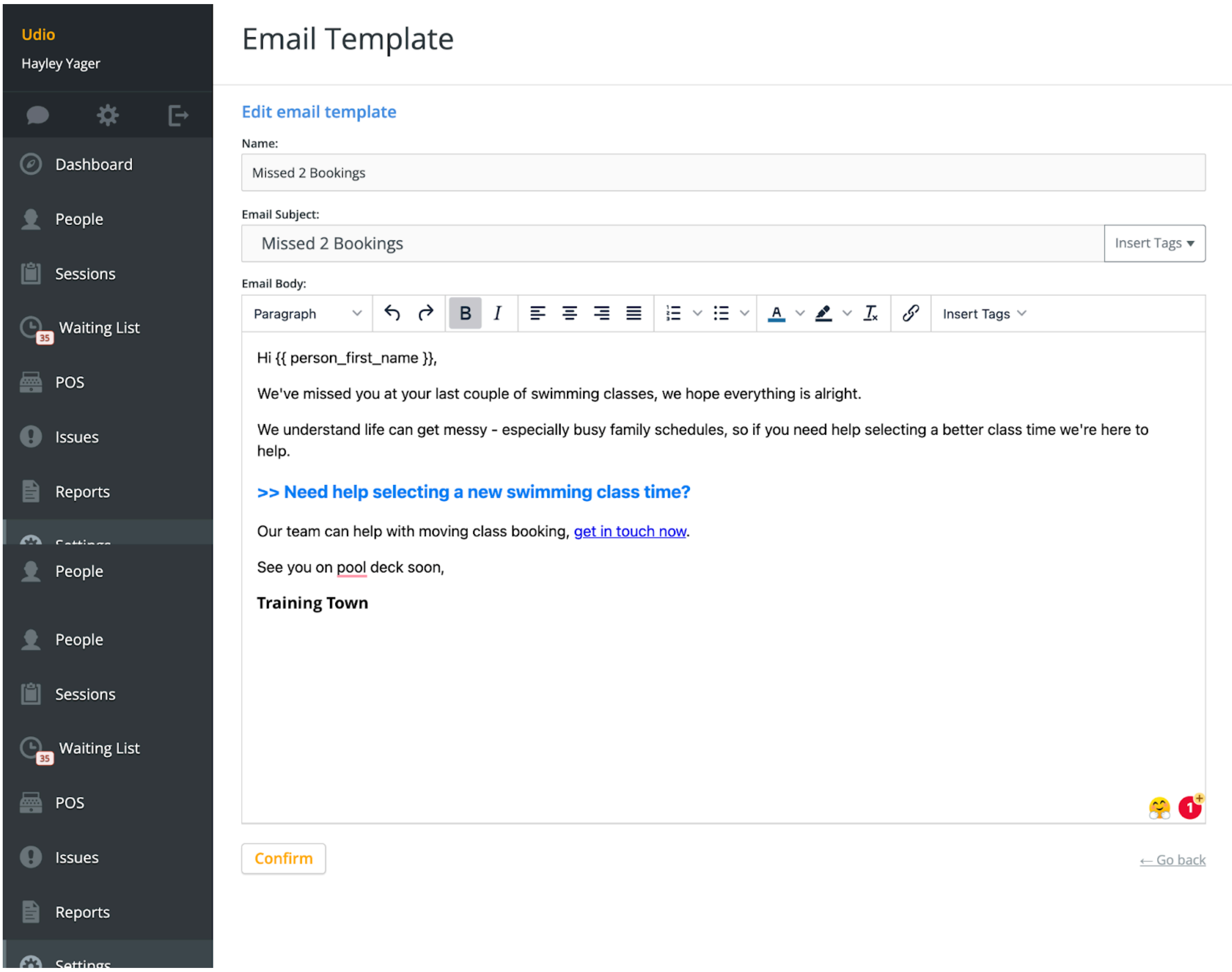


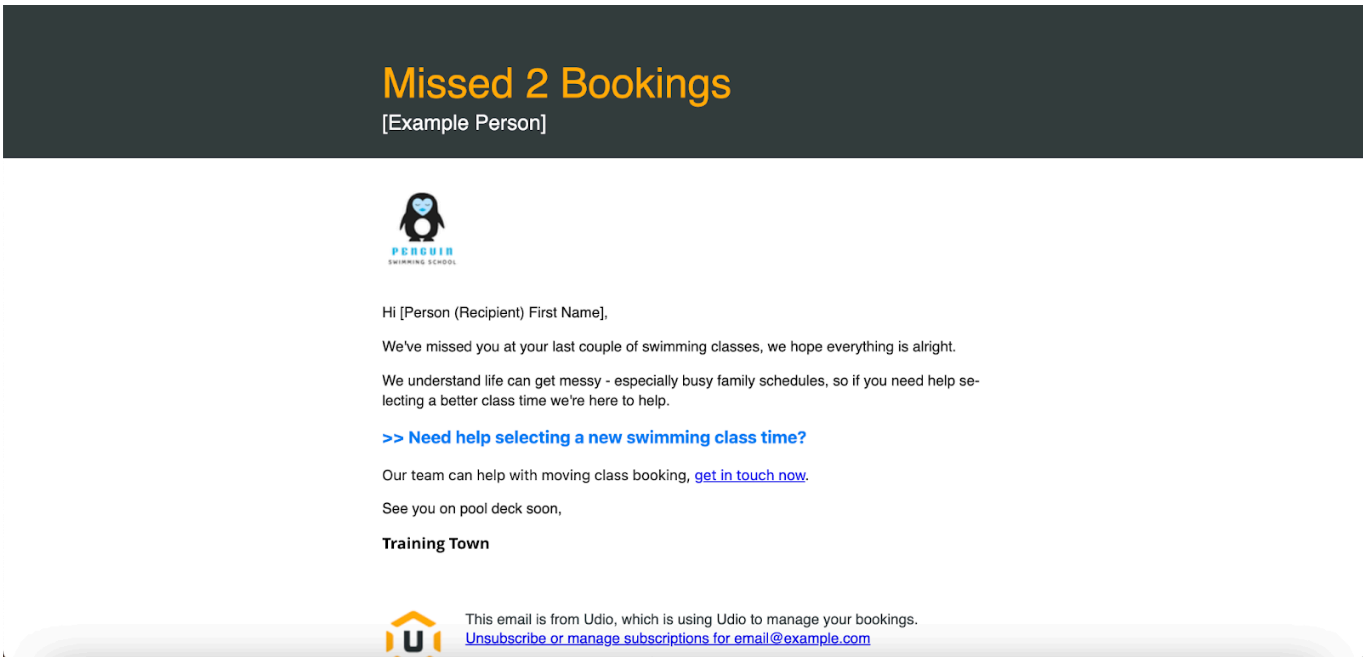
7.2 Email Templates

Use email templates to set up a template that you are manually activating, either individually or as a group email.

- Go to ‘email templates’ under ‘emails & notifications’ and click on 'new template'
- Add a template name and email subject, followed by your email body
- You can include any links to websites and tags from the list.
- Once created, click ‘preview to see how the customer will view it
- These templates can then be sent from the customer’s people page or in bulk under 'send emails'


Udio
Dashboard
People
Sessions
Waiting List
35
POS
Issues
Reports
Email Templates
New Template
Show Removed
Email templates
Template Name
Last Edited By
Last Edited
Actions
Account Notification Template 27
sue.doncon@udiosystems.com
17/02/2020
Edit
Preview
Remove
Booking Summary
sue.doncon@udiosystems.com
26/11/2020
Booking Summary 1
sue.doncon@udiosystems.com
26/06/2020
Congratulations on your Achievement
sue.doncon@udiosystems.com
07/08/2018
Customer Accounts Signup Information
dmitry.ulupov@udiosystems.com
26/02/2020
Design a Team Name and Graphic for your School
sue.doncon@udiosystems.com
08/02/2018
Invoice outstanding (14 day)
sue.doncon@udiosystems.com
26/08/2021

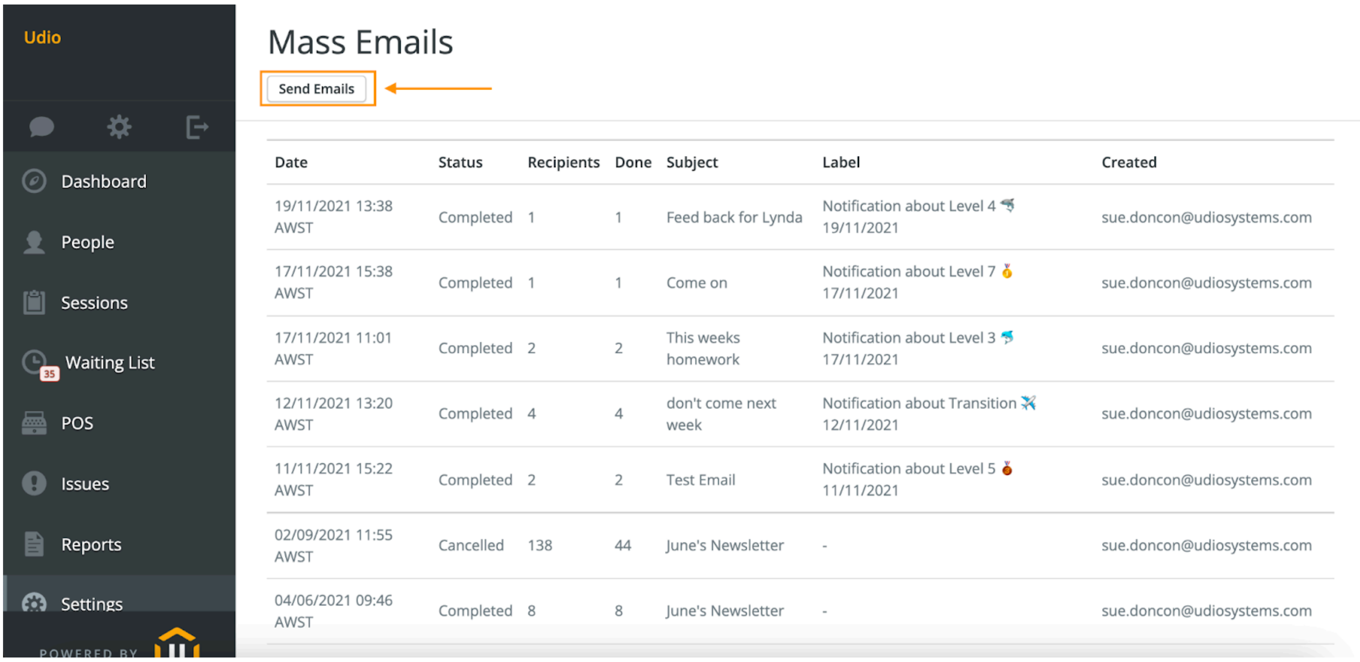

Udio
Hayley Yager
Dashboard
People
Sessions
Waiting List
35
POS
Issues
Reports
Email Template
Edit email template
Name:
Missed 2 Bookings
Email Subject:
Missed 2 Bookings
Insert Tags
Email Body:
Paragraph
Insert Tags
Hi {{ person_first_name }},
We've missed you at your last couple of swimming classes, we hope everything is alright.
We understand life can get messy - especially busy family schedules, so if you need help selecting a better class time we're here to help.
>> Need help selecting a new swimming class time?
Our team can help with moving class booking, get in touch now.
See you on pool deck soon,
Training Town
Confirm
← Go back

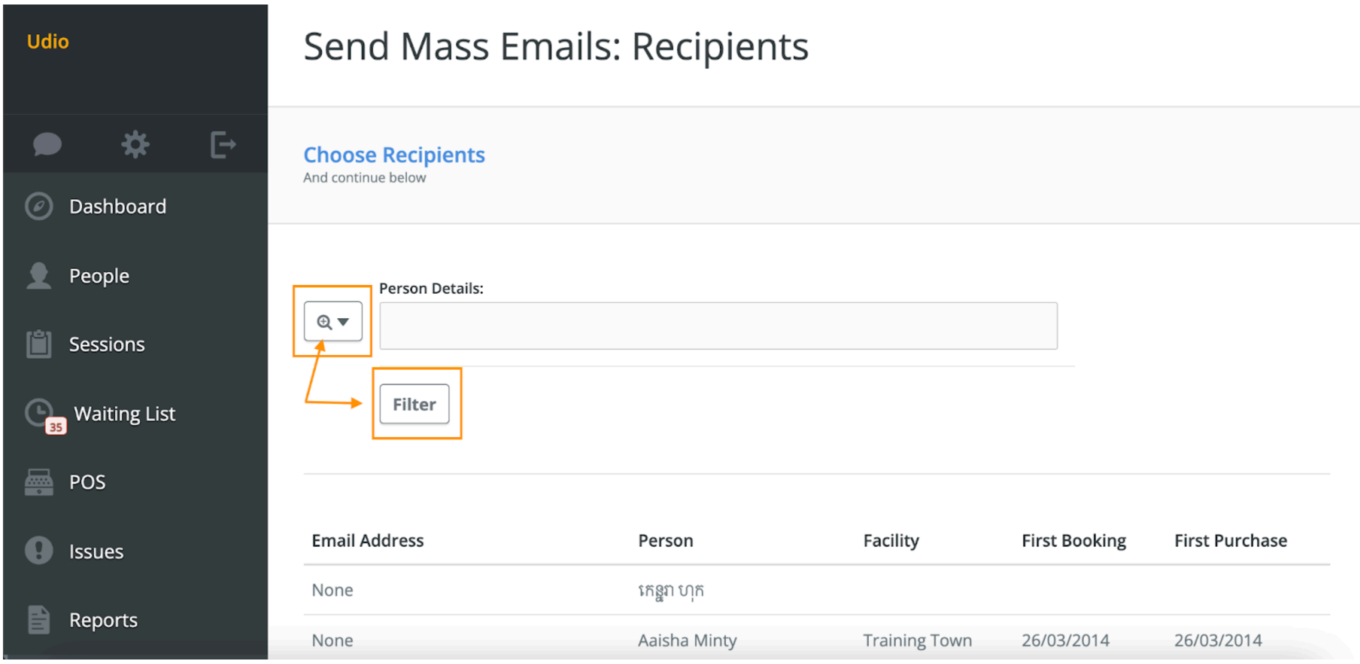


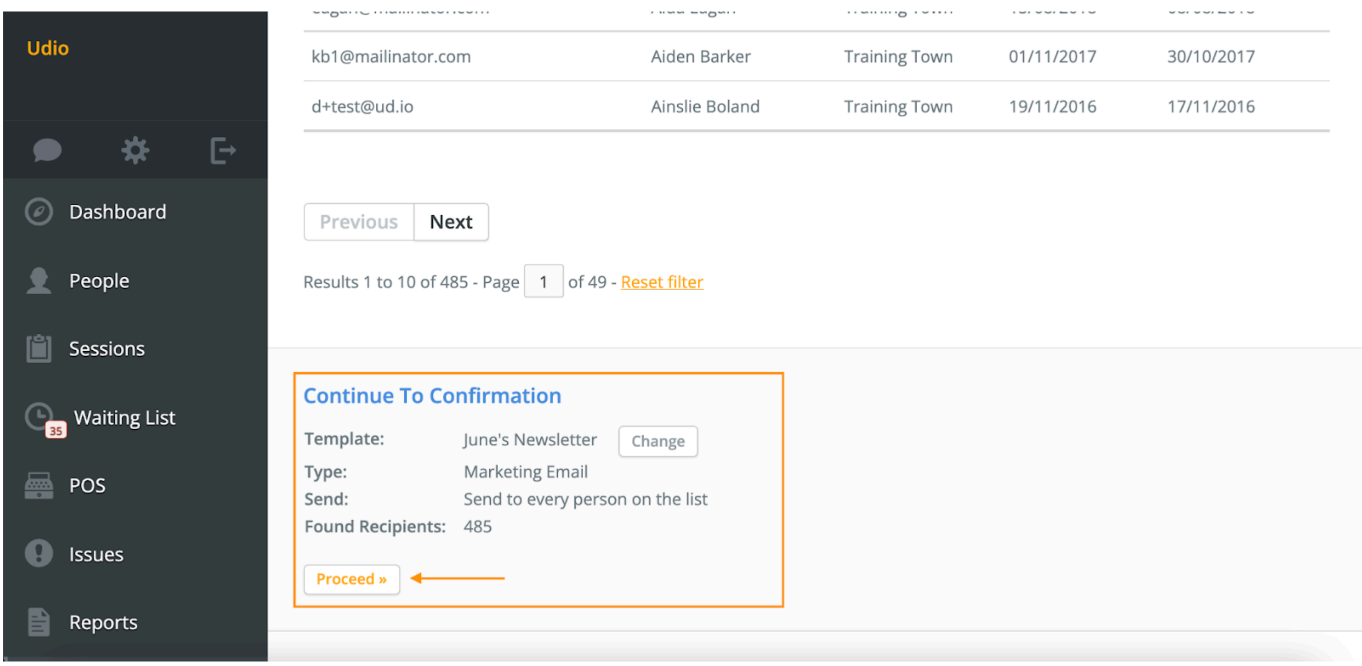
7.3 Send Emails

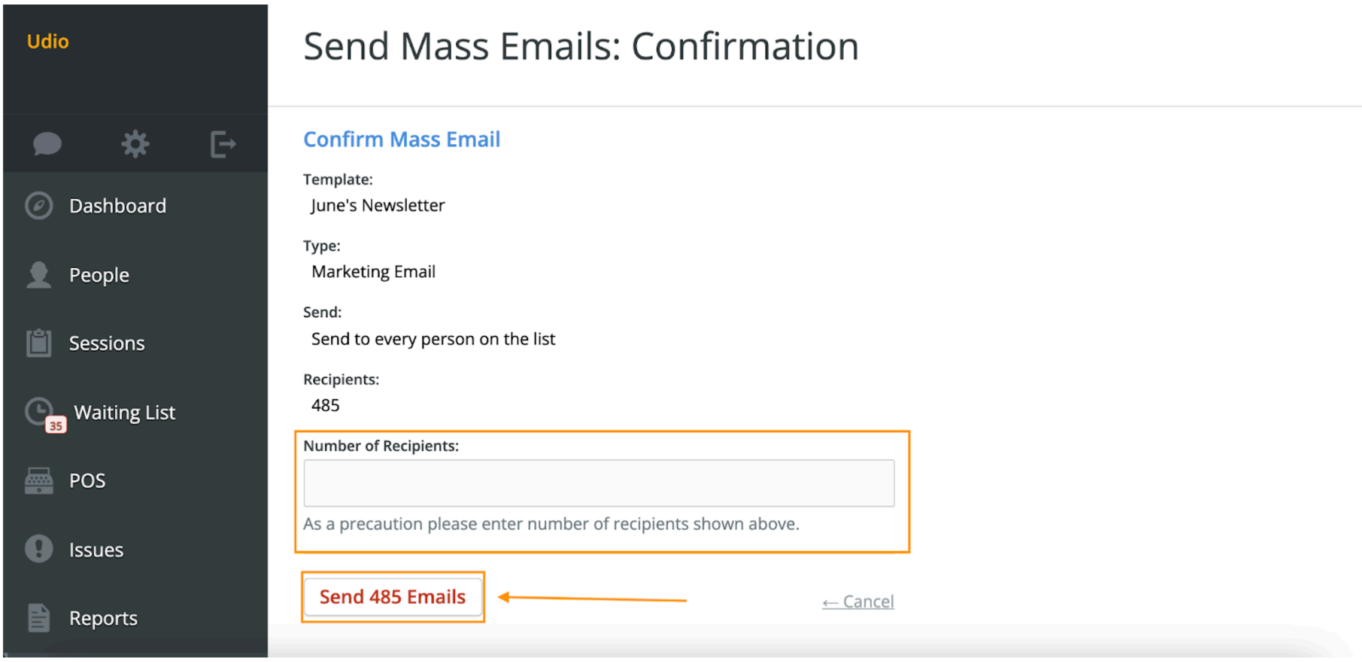
Before you start, make sure you have created the template for the email you want to send.

- Click on 'send emails' under 'emails & notifications' and then 'send emails' again on the next page which shows all completed and cancelled emails
- Select the relevant email template, update the event type (general notification, important or marketing) and who to send to if required, then click 'proceed'
- Click on the magnifying glass and select your filters, update and click 'filter'
- Scroll to the bottom of the page to continue and click 'proceed'
- The next page allows you to check the information one last time
- To avoid sending thousands of emails in error, we require you to enter the number of email recipients you are about to send to
- You will now have a paginated view of all emails sent via mass email, including the number of recipients and the status (completed, running, cancelled)


Udio
Dashboard
People
Sessions
Waiting List
35
POS
Issues
Reports
Settings
Mass Emails
Send Emails
Date
Status
Recipients
Done
Subject
Label
Created
19/11/2021 13:38 AWST
Completed
1
1
Feed back for Lynda
Notification about Level 4 19/11/2021
sue.doncon@udiosystems.com
17/11/2021 15:38 AWST
Completed
1
1
Come on
Notification about Level 7 17/11/2021
sue.doncon@udiosystems.com
17/11/2021 11:01 AWST
Completed
2
2
This weeks homework
Notification about Level 3 17/11/2021
sue.doncon@udiosystems.com
12/11/2021 13:20 AWST
Completed
4
4
don't come next week
Notification about Transition 12/11/2021
sue.doncon@udiosystems.com
11/11/2021 15:22 AWST
Completed
2
2
Test Email
Notification about Level 5 11/11/2021
sue.doncon@udiosystems.com
02/09/2021 11:55 AWST
Cancelled
138
44
June's Newsletter
-
sue.doncon@udiosystems.com
04/06/2021 09:46 AWST
Completed
8
8
June's Newsletter
-
sue.doncon@udiosystems.com


Udio
Dashboard
People
Sessions
Waiting List
35
POS
Issues
Reports
Send Mass Emails: Recipients
Choose Recipients
And continue below
Person Details:
Filter
Email Address
Person
Facility
First Booking
First Purchase
None
តេន្ធា ហុក
None
Aaisha Minty
Training Town
26/03/2014
26/03/2014



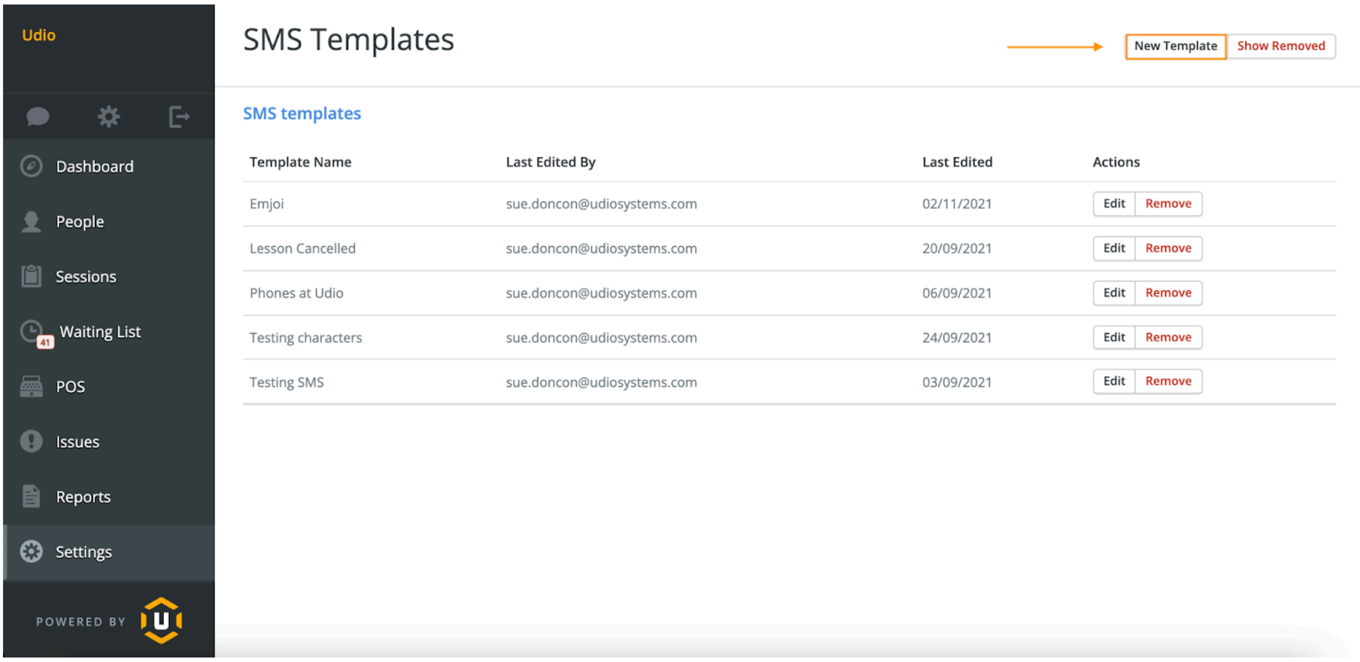


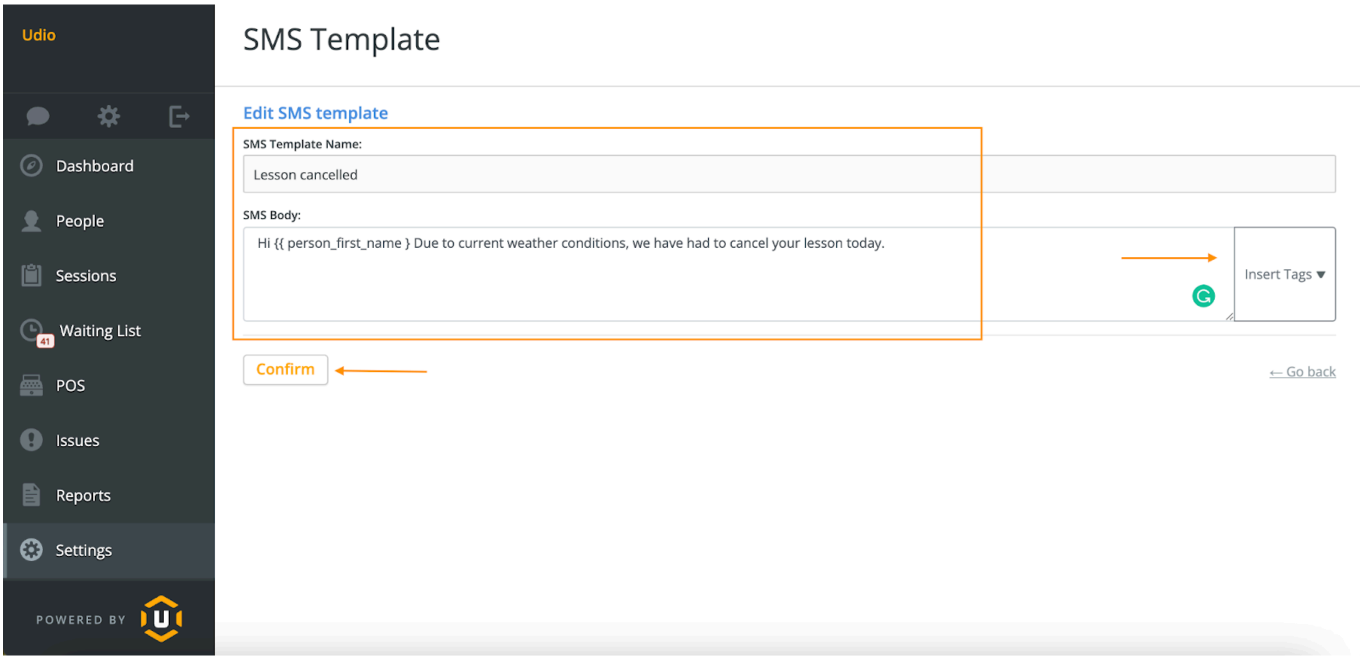
7.4 SMS Templates

You can set up SMS templates the same way you set up email templates.

- Select *'New Template'*
- Give your template a name
- Write the body of the text, including any merge tags (such as first name)
- Click *'Confirm'*

Note: SMS' are charged on a length basis, where one SMS credit equals 160 characters (max). For example, if each SMS costs 10c, an SMS of 180 characters will cost 20c as it uses two SMS credits.

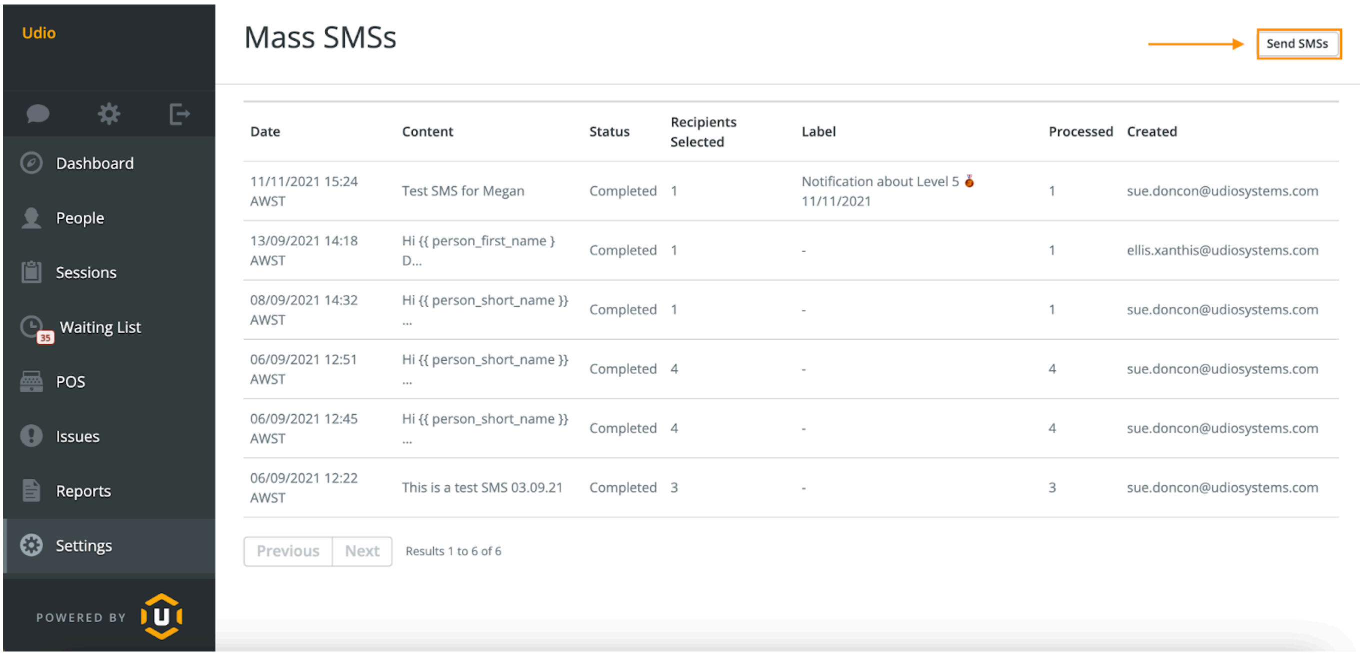


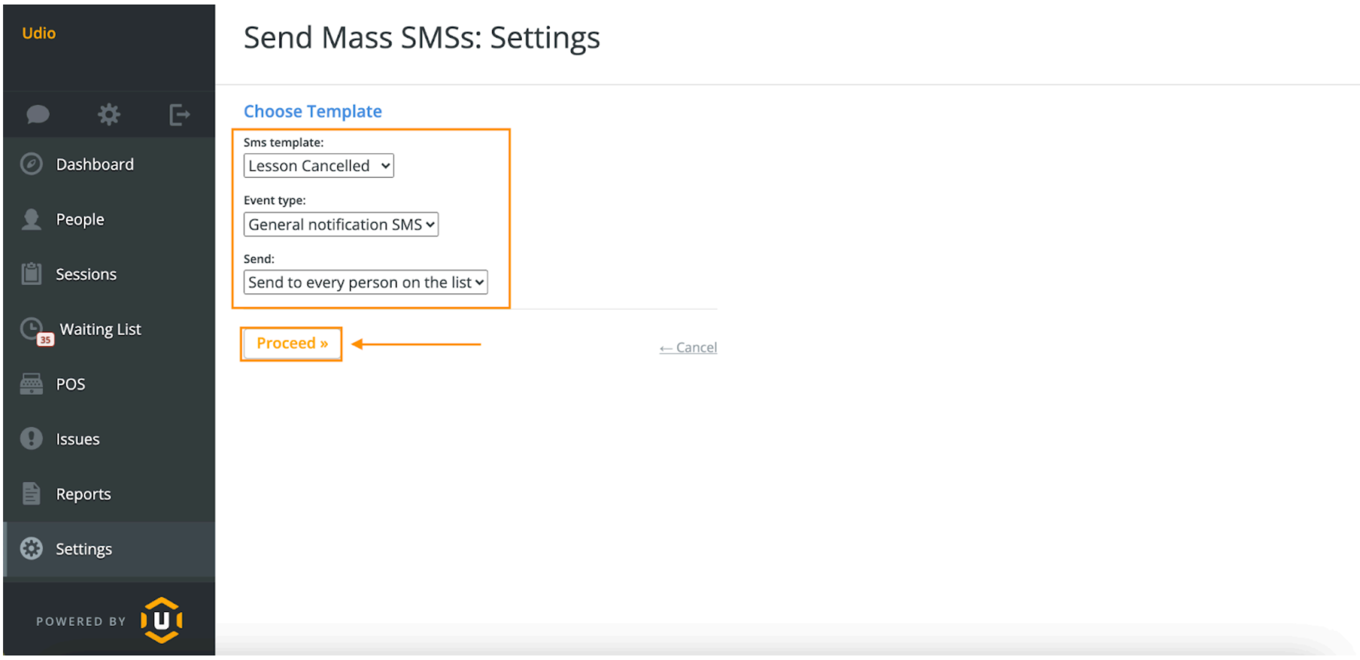


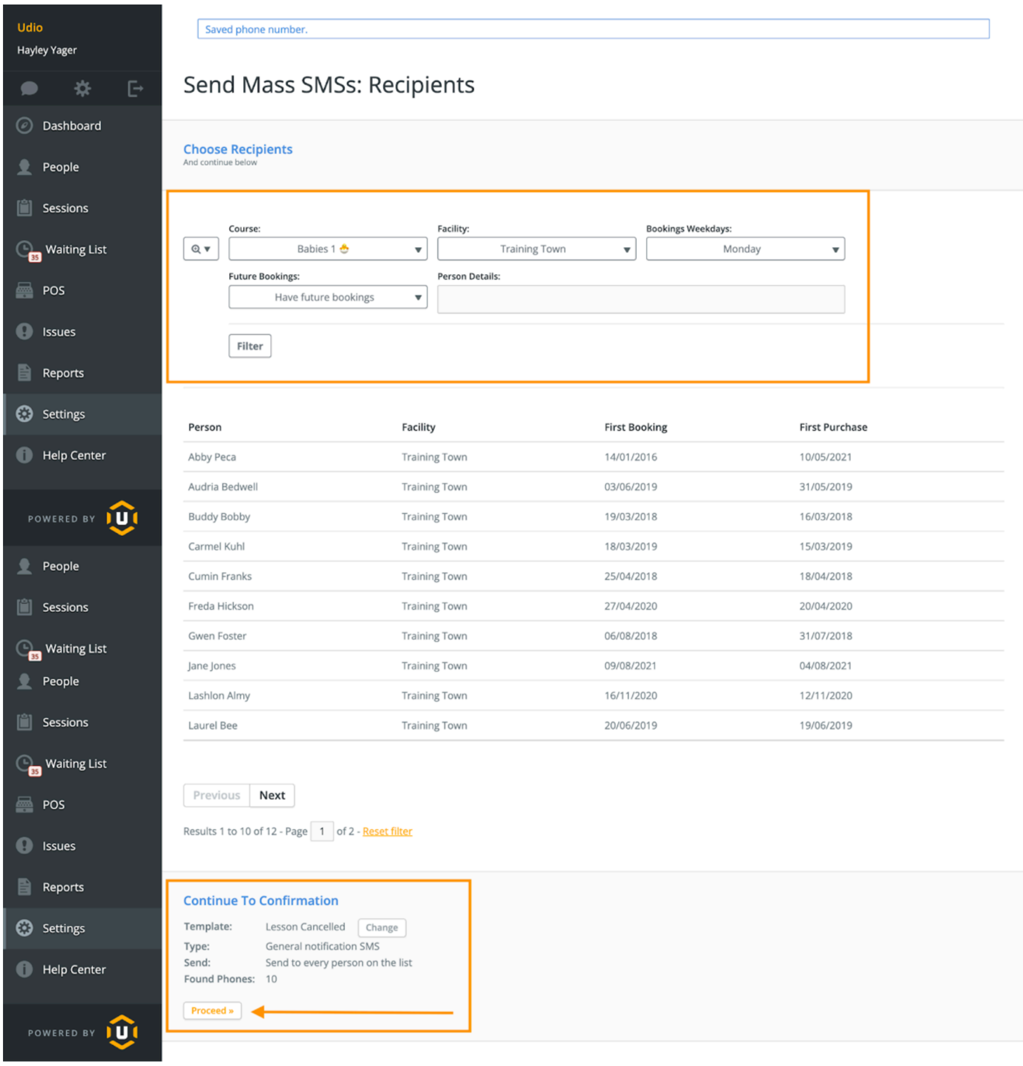
7.5 Send SMS

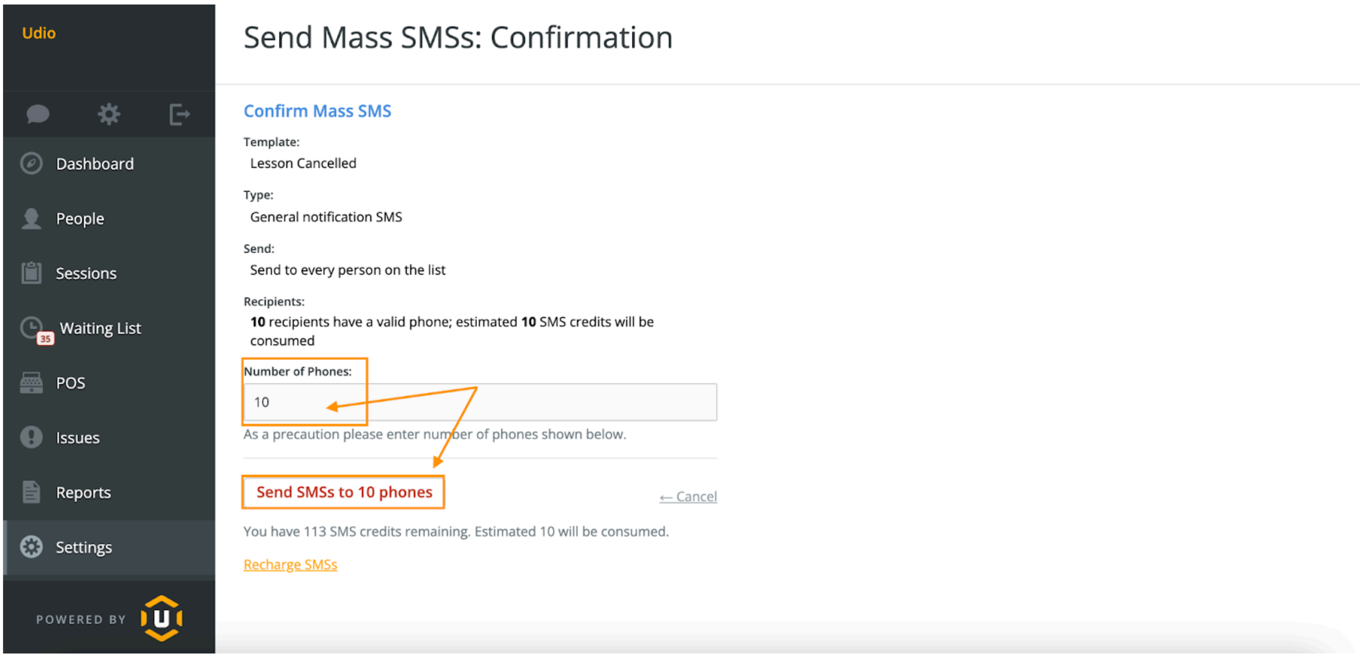
Once you've created your SMS template:

- Click on '*Send SMSs*'
- Select the relevant SMS template, update the event type and select whether to send to bill payers only or everyone on the list, then *'proceed'*
- Click on the magnifying glass to select your filters and click *'filter'*
- Scroll to the bottom of the page to check the information, including the template selected and click *'proceed'* (note: there is one more confirmation step before the SMS sends)
- The final page shows the number of recipients, the number of SMS credits remaining and the number that will be used; enter the number of phones as prompted and 'send SMSs to x phones'


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
POWERED BY
Mass SMSs
Send SMSs
Date
Content
Status
Recipients Selected
Label
Processed
Created
11/11/2021 15:24 AWST
Test SMS for Megan
Completed
1
Notification about Level 5 11/11/2021
1
sue.doncon@udiosystems.com
13/09/2021 14:18 AWST
Hi {{ person_first_name } D...
Completed
1
-
1
ellis.xanthis@udiosystems.com
08/09/2021 14:32 AWST
Hi {{ person_short_name }} ...
Completed
1
-
1
sue.doncon@udiosystems.com
06/09/2021 12:51 AWST
Hi {{ person_short_name }} ...
Completed
4
-
4
sue.doncon@udiosystems.com
06/09/2021 12:45 AWST
Hi {{ person_short_name }} ...
Completed
4
-
4
sue.doncon@udiosystems.com
06/09/2021 12:22 AWST
This is a test SMS 03.09.21
Completed
3
-
3
sue.doncon@udiosystems.com
Previous
Next
Results 1 to 6 of 6


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
POWERED BY
Send Mass SMSs: Settings
Choose Template
Sms template:
Lesson Cancelled
Event type:
General notification SMS
Send:
Send to every person on the list
Proceed »
← Cancel

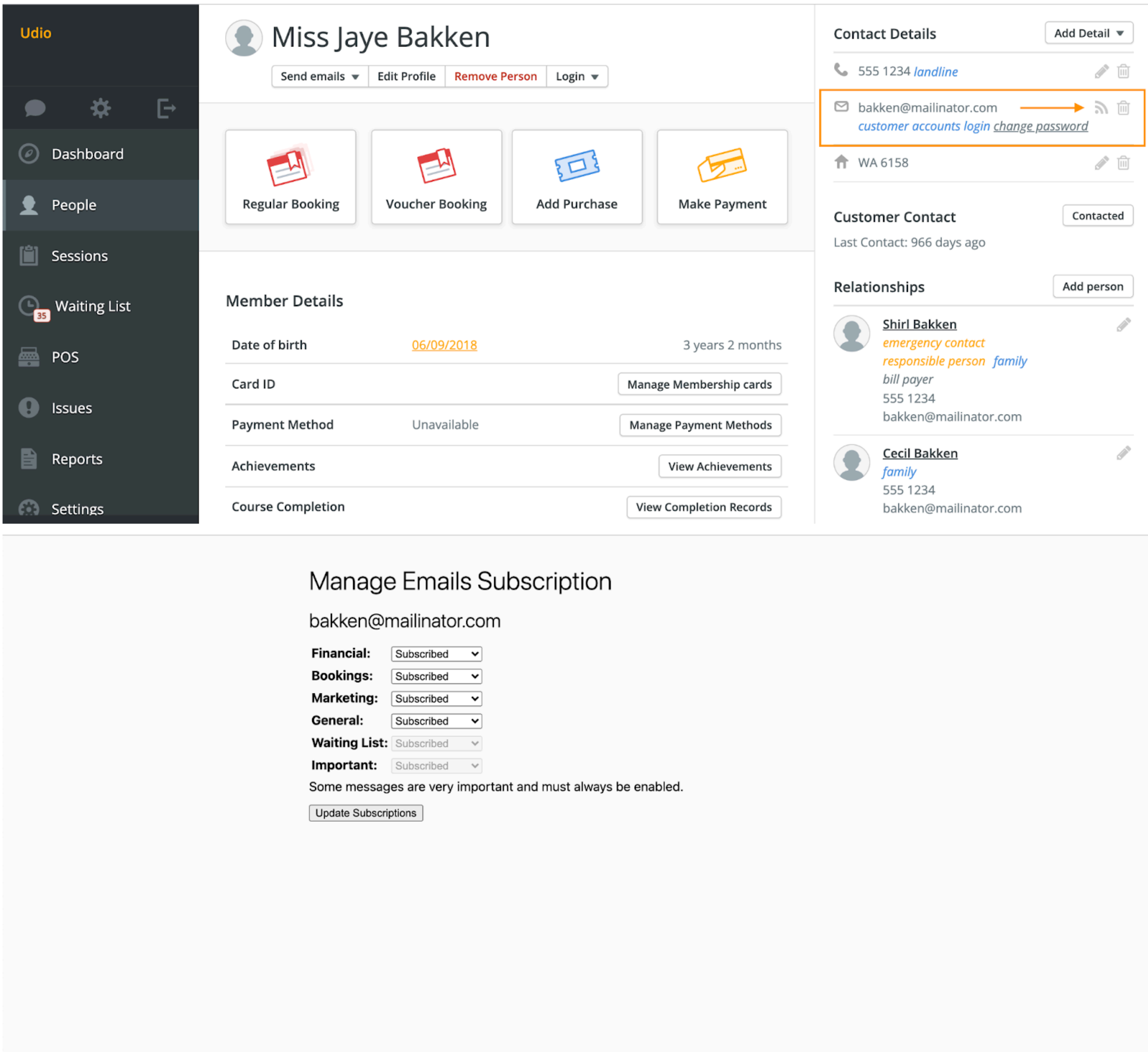

Udio
Hayley Yager
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Help Center
POWERED BY
Saved phone number.
Send Mass SMSs: Recipients
Choose Recipients
And continue below
Course:
Babies 1
Facility:
Training Town
Bookings Weekdays:
Monday
Future Bookings:
Have future bookings
Person Details:
Filter
Person
Facility
First Booking
First Purchase
Abby Peca Training Town 14/01/2016 10/05/2021
Audria Bedwell Training Town 03/06/2019 31/05/2019
Buddy Bobby Training Town 19/03/2018 16/03/2018
Carmel Kuhl Training Town 18/03/2019 15/03/2019
Cumin Franks Training Town 25/04/2018 18/04/2018
Freda Hickson Training Town 27/04/2020 20/04/2020
Gwen Foster Training Town 06/08/2018 31/07/2018
Jane Jones Training Town 09/08/2021 04/08/2021
Lashlon Almy Training Town 16/11/2020 12/11/2020
Laurel Bee Training Town 20/06/2019 19/06/2019
Previous
Next
Results 1 to 10 of 12 - Page 1 of 2 - Reset filter
Continue To Confirmation
Template: Lesson Cancelled
Change
Type: General notification SMS
Send: Send to every person on the list
Found Phones: 10
Proceed »


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
POWERED BY
Send Mass SMSs: Confirmation
Confirm Mass SMS
Template:
Lesson Cancelled
Type:
General notification SMS
Send:
Send to every person on the list
Recipients:
10 recipients have a valid phone; estimated 10 SMS credits will be consumed
Number of Phones:
10
As a precaution please enter number of phones shown below.
Send SMSs to 10 phones
← Cancel
You have 113 SMS credits remaining. Estimated 10 will be consumed.
Recharge SMSs

7.6 Misc

7.6.1 Opt-Out Management

You can manage your customer's email opt-outs from the email editing page on the person details page (when you click on the curved icon next to the email address).



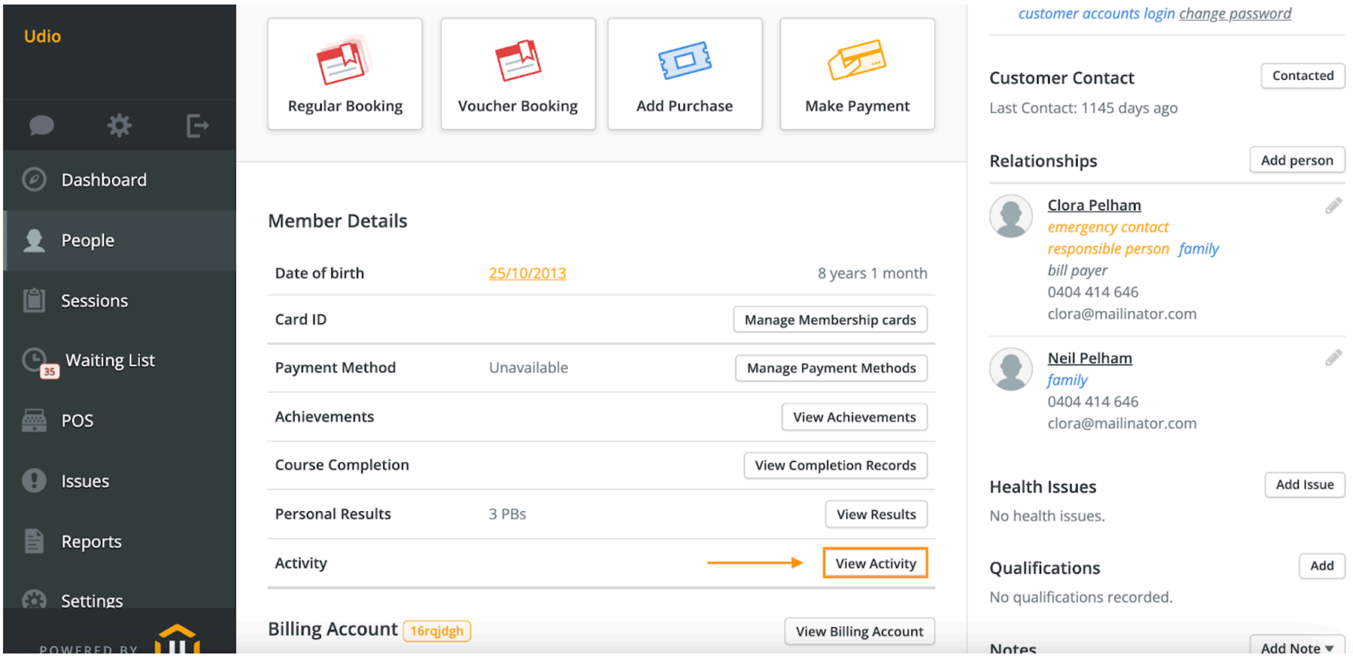
7.6.2 Activity Logs

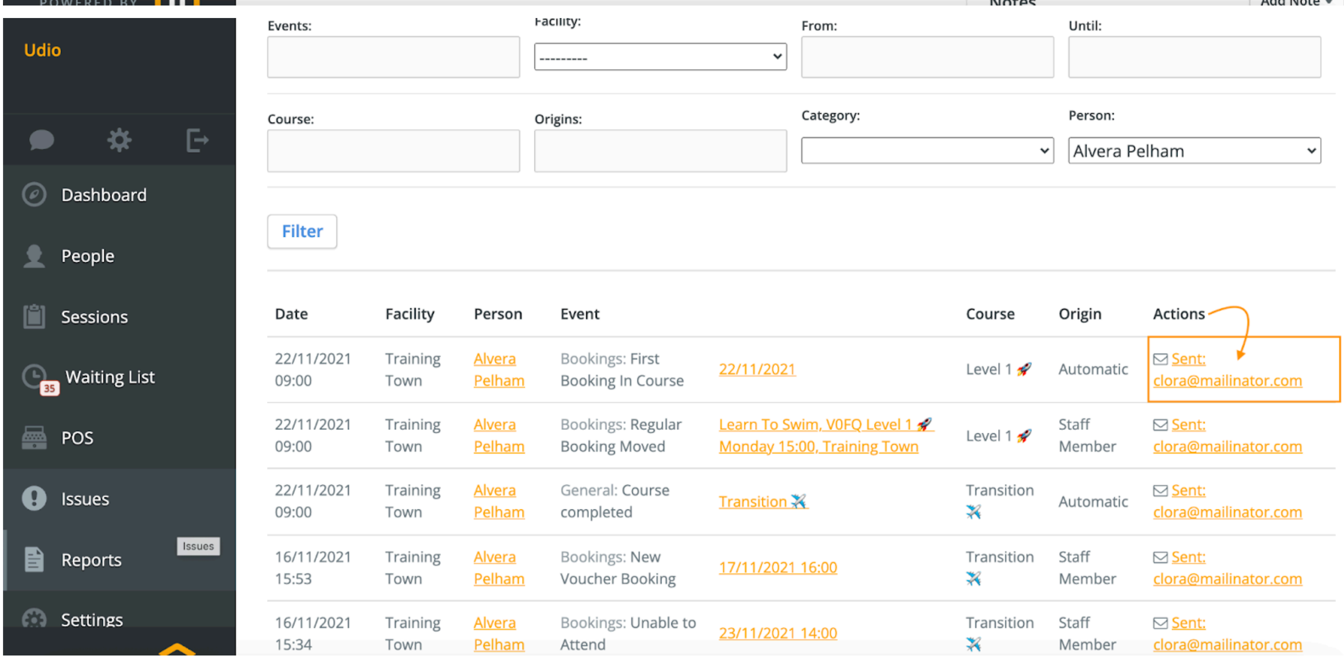
There are two places to view a customer’s events and activity.

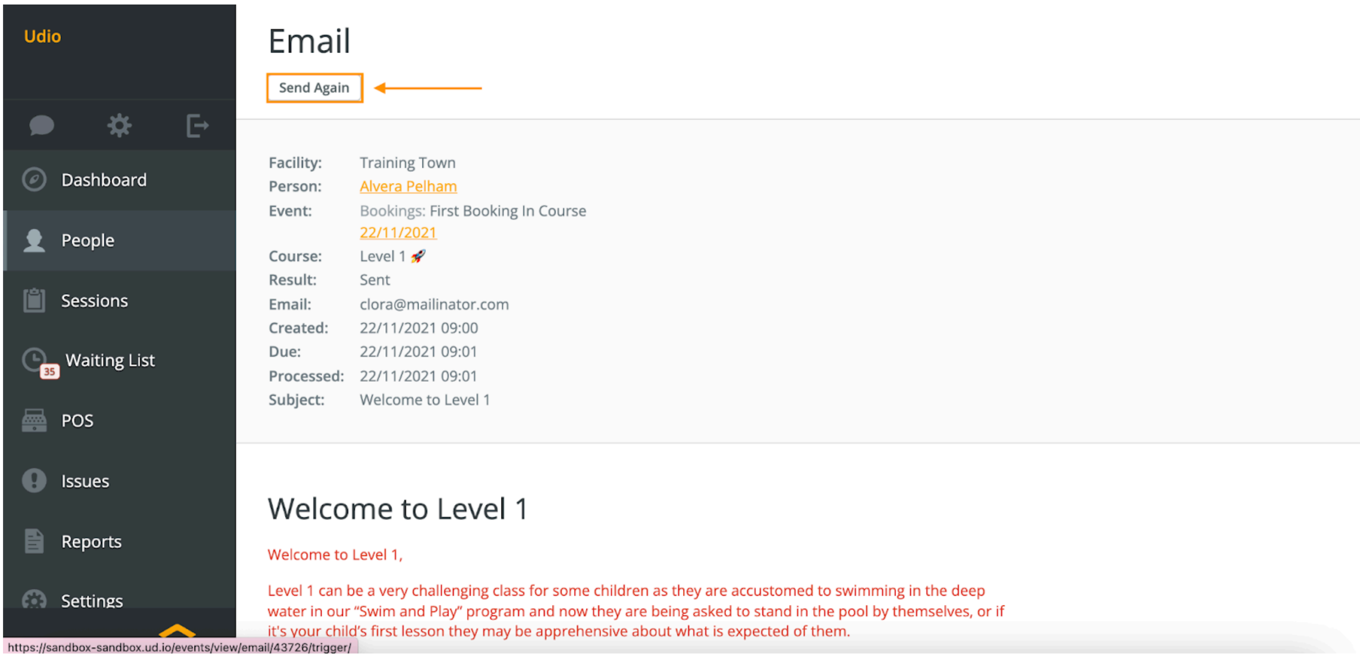
- Click 'view activity' on the person's details page or 'all activity' in the 'reports section'
- In those sections, you can see all the events that happened for a particular person or for everyone in your database
- For each event, you can also see if emails were sent and to which email address

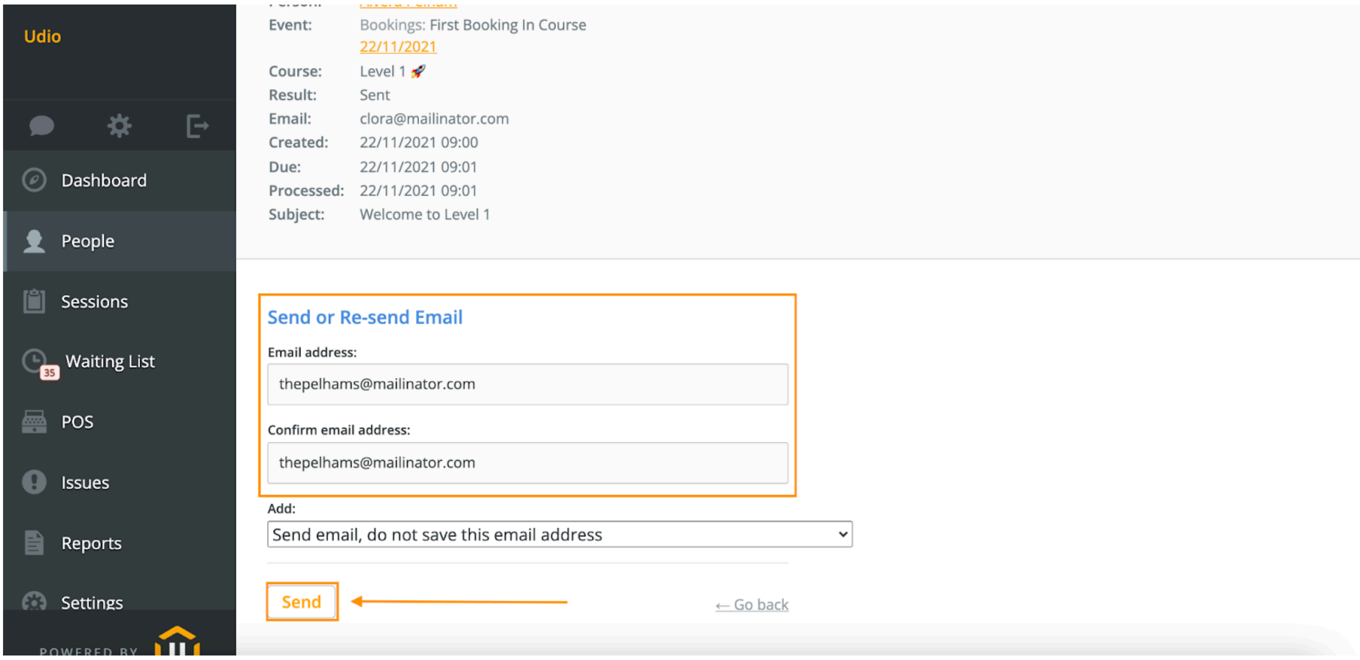
- If a customer asks you to resend a payment receipt or send an email to a different address, you can do so within the activity list by clicking the email link under 'actions'

View activity on person page

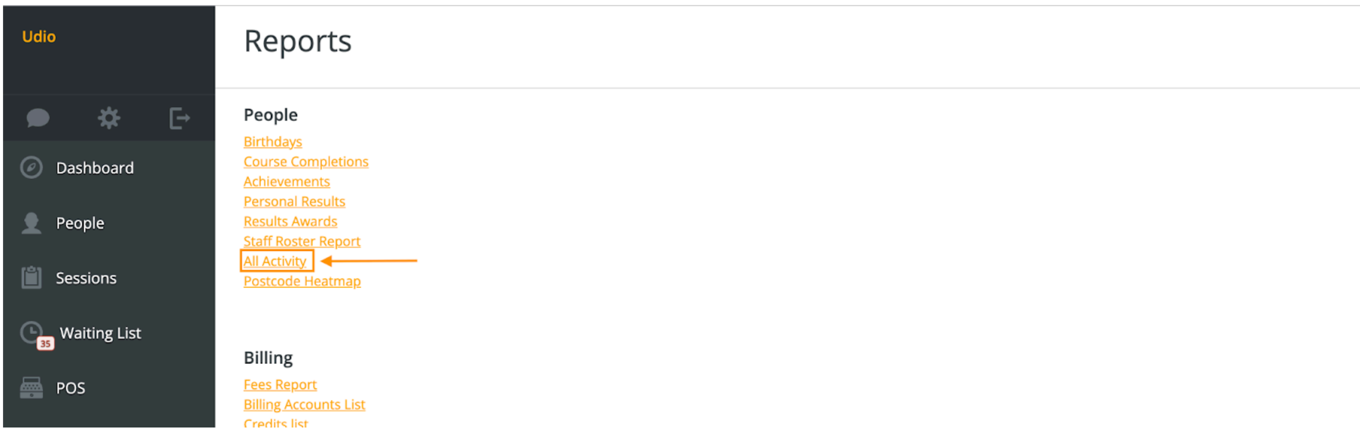


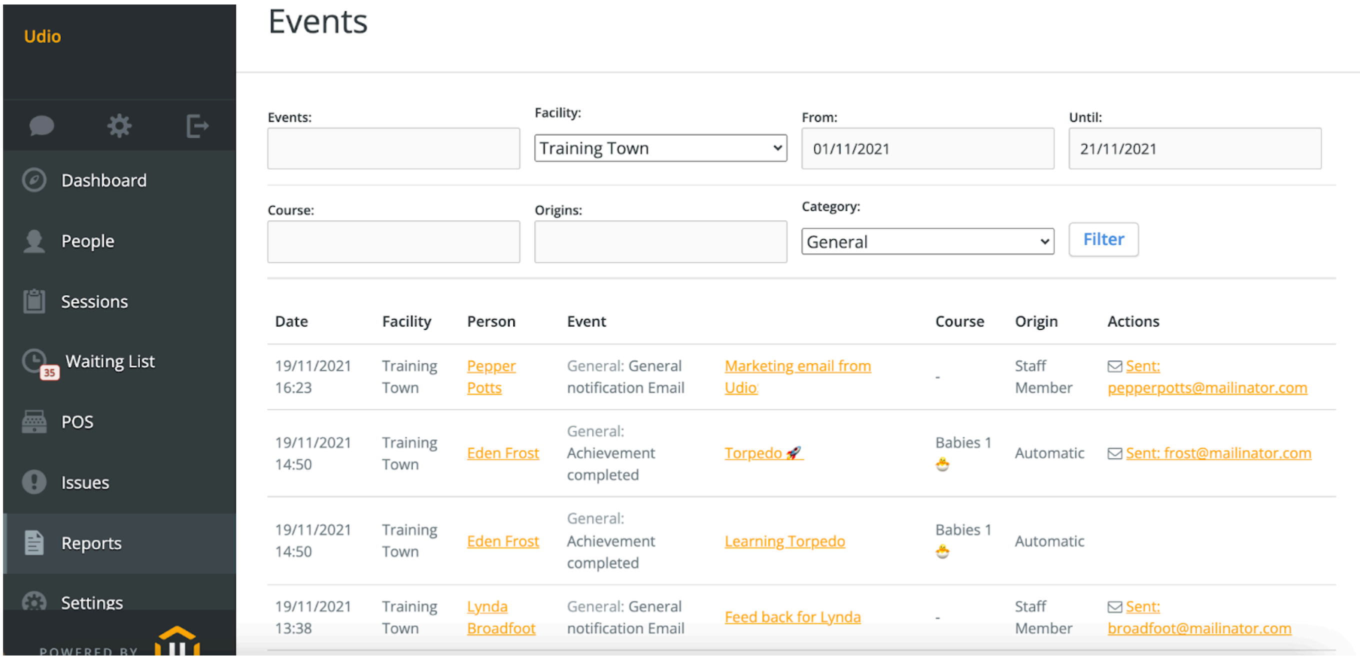


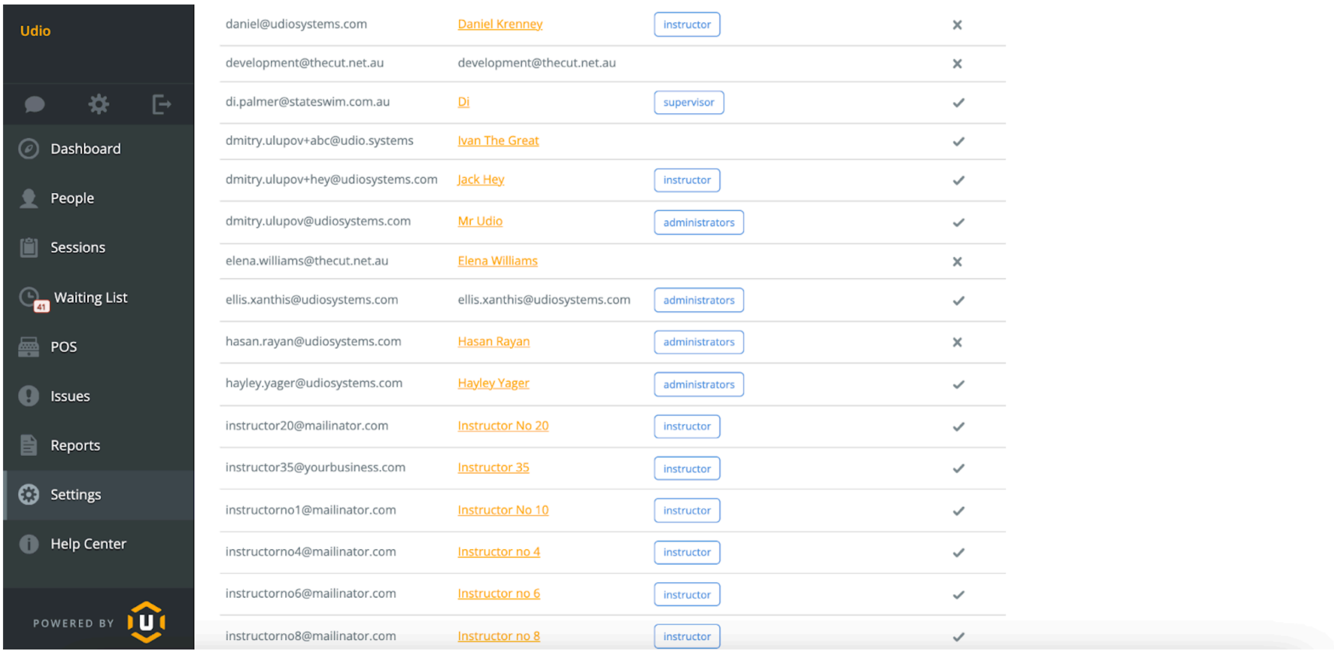




View activity across business







• 8.People

8.1 Configure health conditions categories

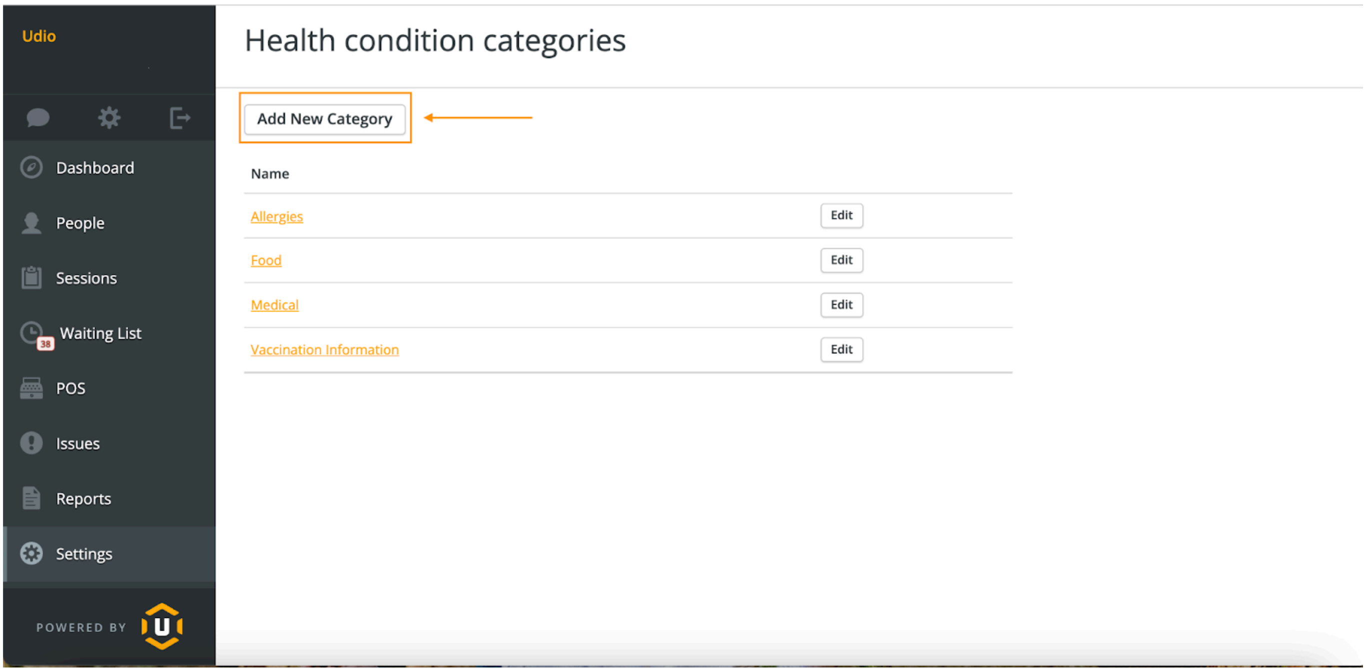
This part of the setup allows you to input categories to help you categorise your customers' health conditions. You can add, edit and update health conditions; for example, you might choose to have just two categories: medical and allergies.

For a faster setup, we've pre-populated this section with some data.

8.1.1 Adding a new health condition category

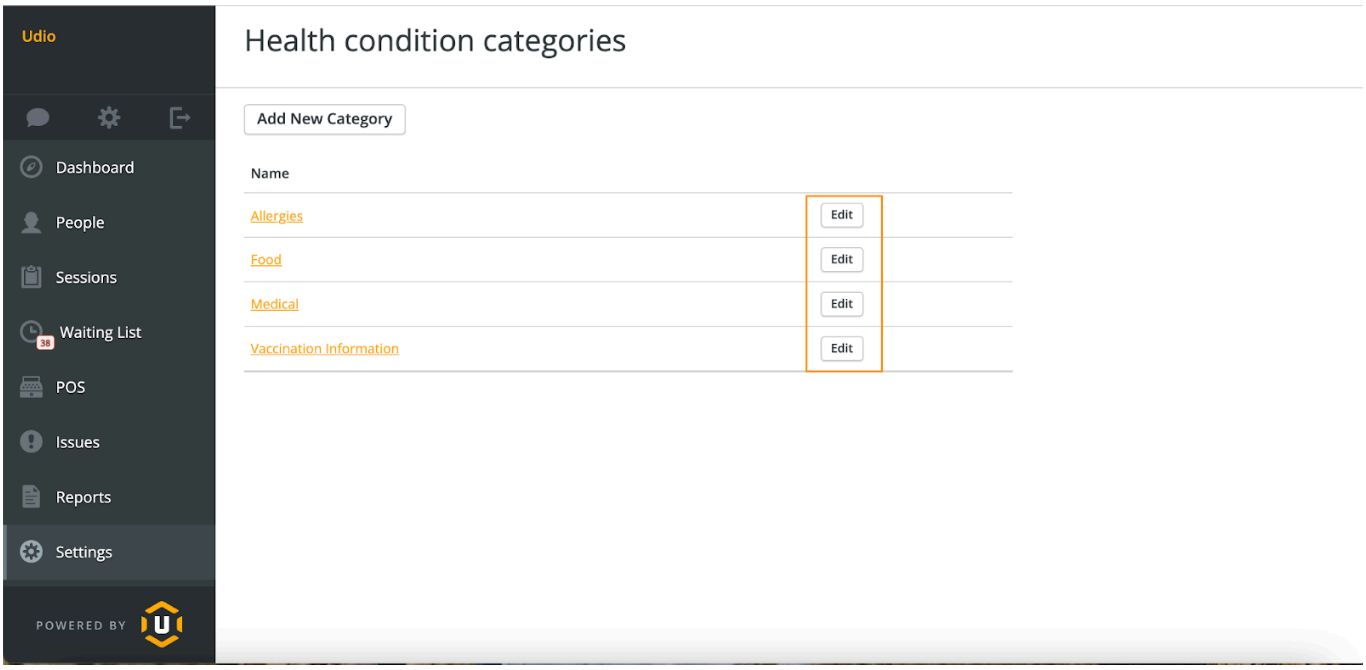
- From settings, click '*Configure health condition categories*'

- Click *'Add new category'*
- Add in the name and *'Confirm'*
- Repeat for all categories



8.1.2 Editing health condition categories

- From the '*Configure health condition*' categories click on *'Edit'* and change the name



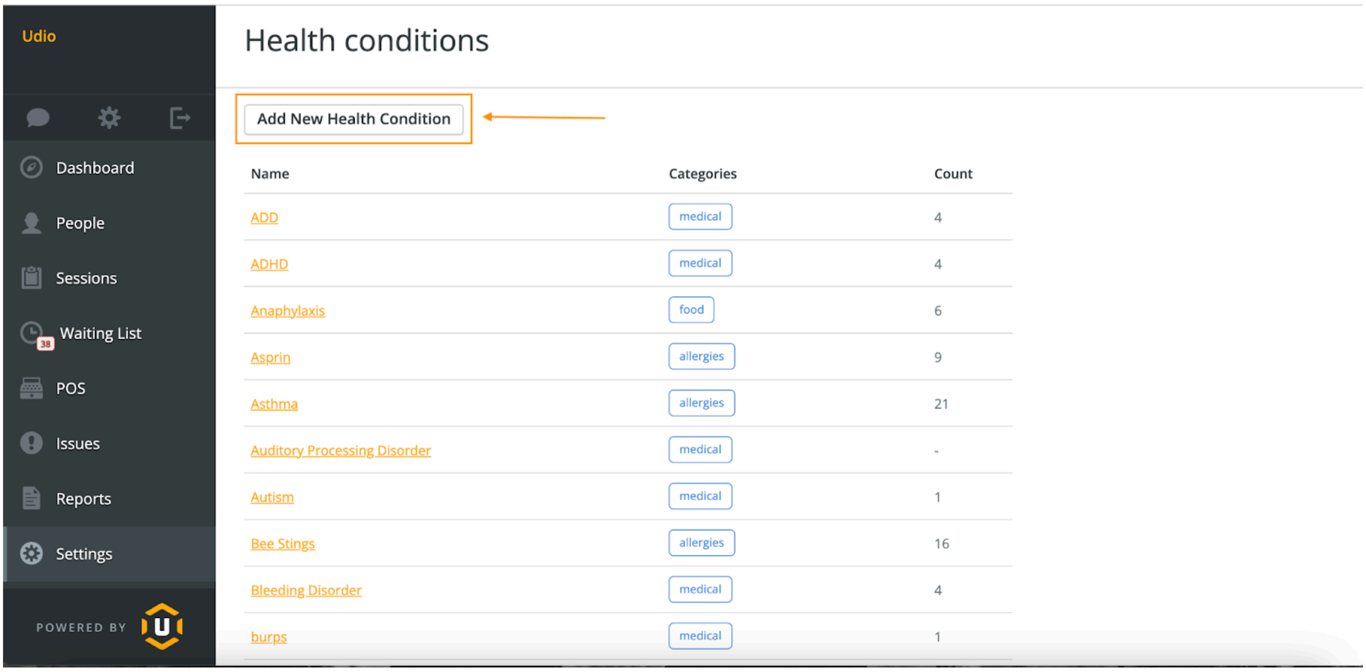
8.2 Configure health conditions

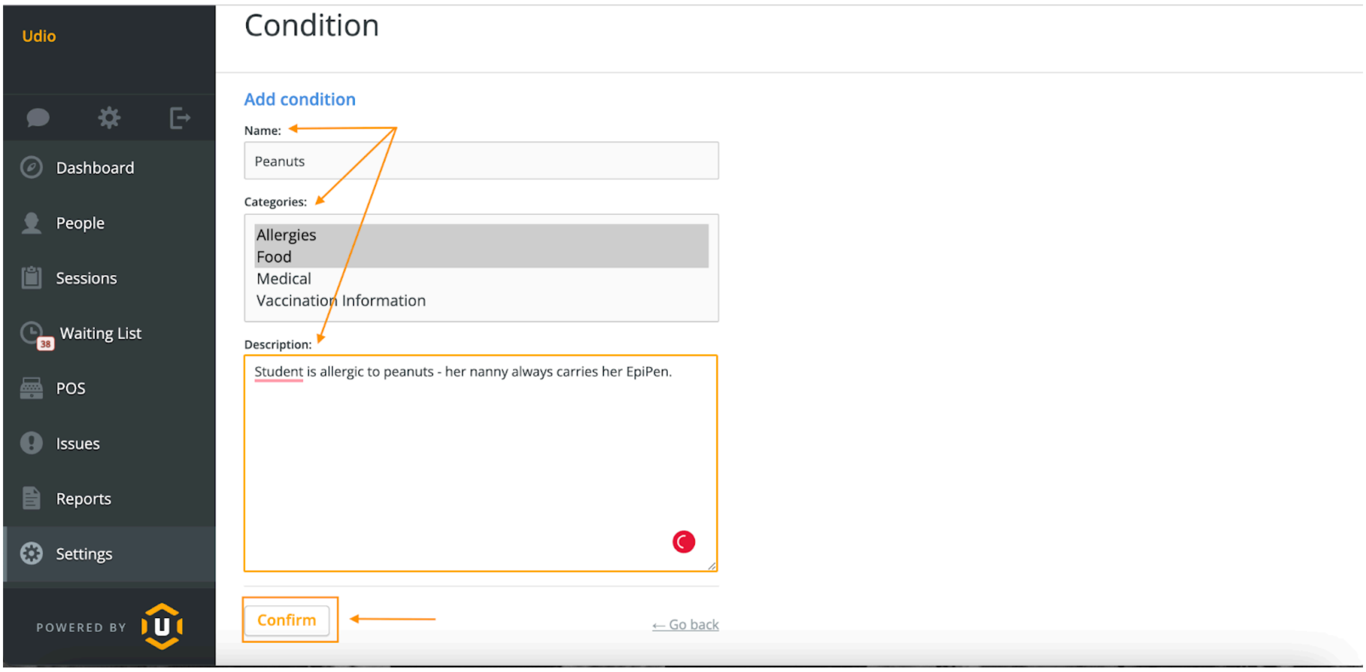
8.2.1 Adding a new health condition

This setting enables you to add health conditions, e.g. asthma, allergies, seizures, etc.

- From settings, click '*Configure health conditions'* then '*Add new health condition'*

- Enter the name of the health condition
- Choose the category or categories that the health condition belongs to (from step 1.1)
- Click *'Confirm'*
- Repeat for all health conditions





8.2.2 Editing a health condition

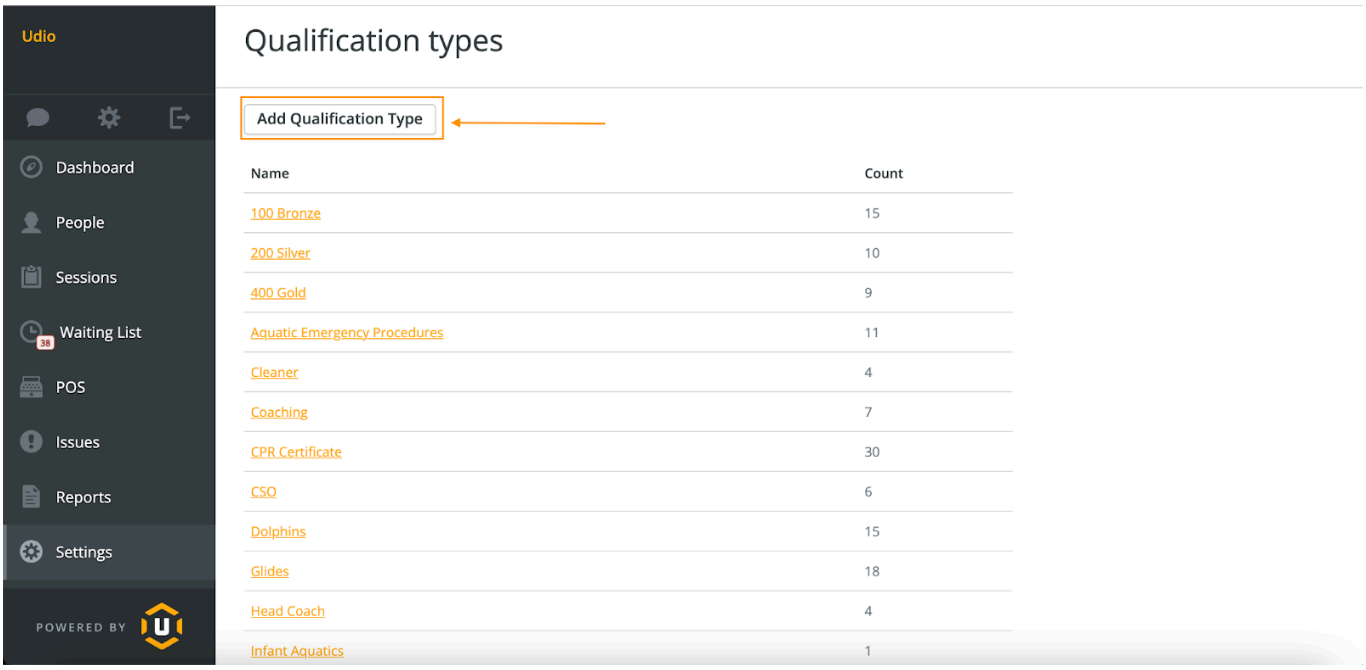
- From the health conditions page, click on the name of the health condition you need to edit
- Update the information and click *'Confirm'*

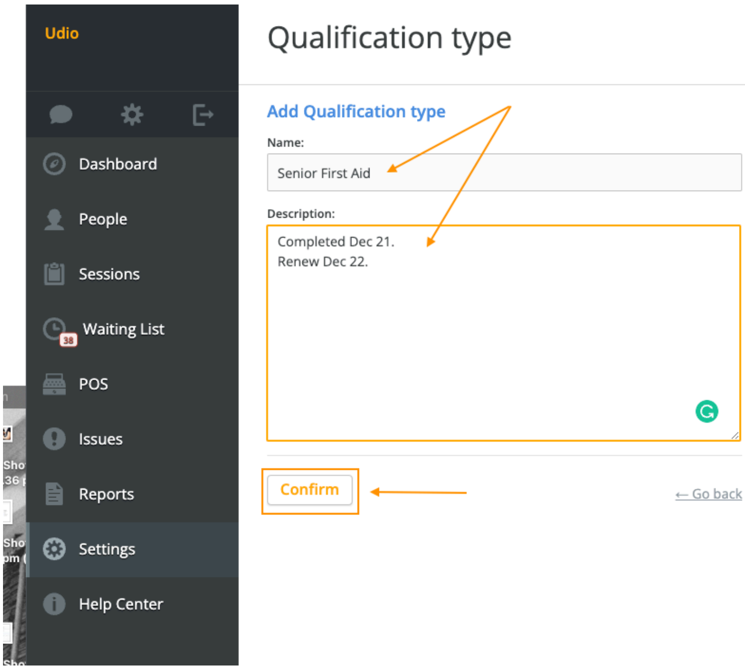
8.3 Configure qualification types

This setting enables you to add, edit and update the qualification types for your staff, allowing you to store all the relevant information for easy access.

8.3.1 Adding a new qualification type

- From settings, click on *'Configure qualification types'*
- Select *'Add qualification type'*
- Type in the name and a description if required
- Click *'Confirm'*
- Repeat for all qualifications





8.3.2 Editing a qualification type

- From qualification types, click on the name of the qualification you need to edit
- Update the information and click *'Confirm'*

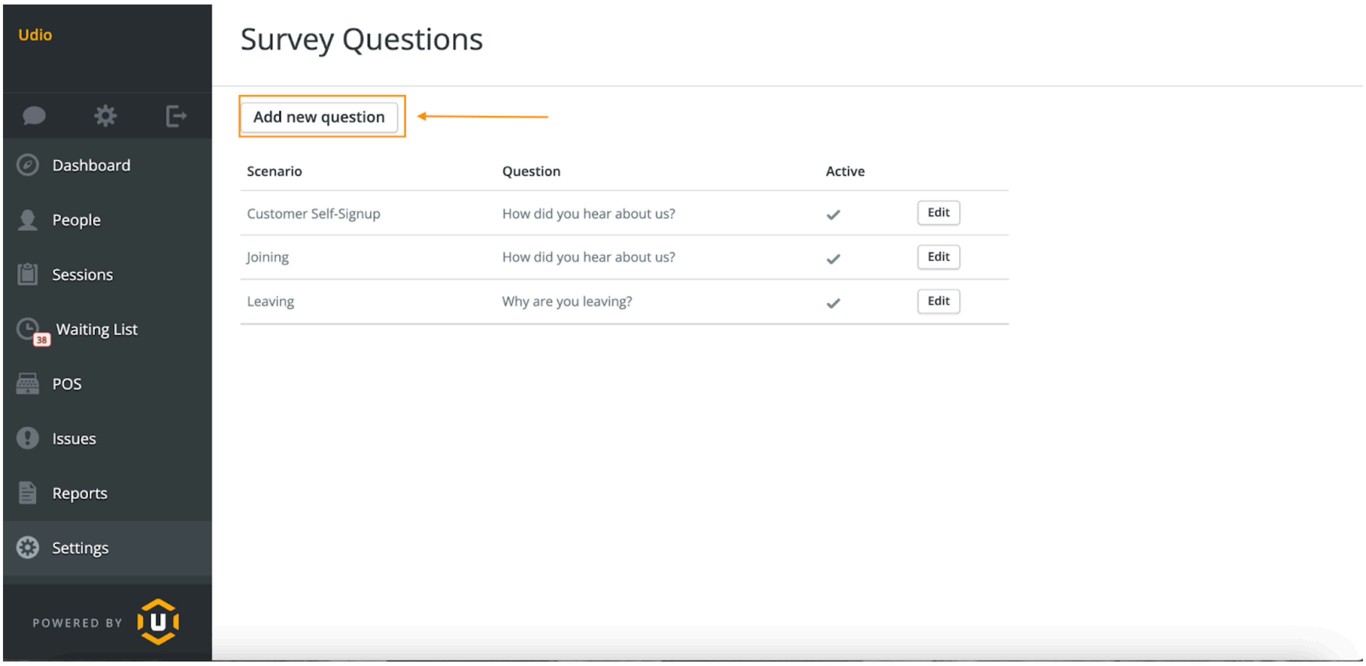
8.4 Configure survey questions

Customer data can be extremely useful for marketing, advertising and public relations work. Udio can help you gather this important feedback by prompting your staff to ask customers targeted questions, such as "*where did you hear about us?*" or "*why are you leaving?*" You can then view the answers under 'reports.'

For a faster setup, we've pre-populated this section with some data.

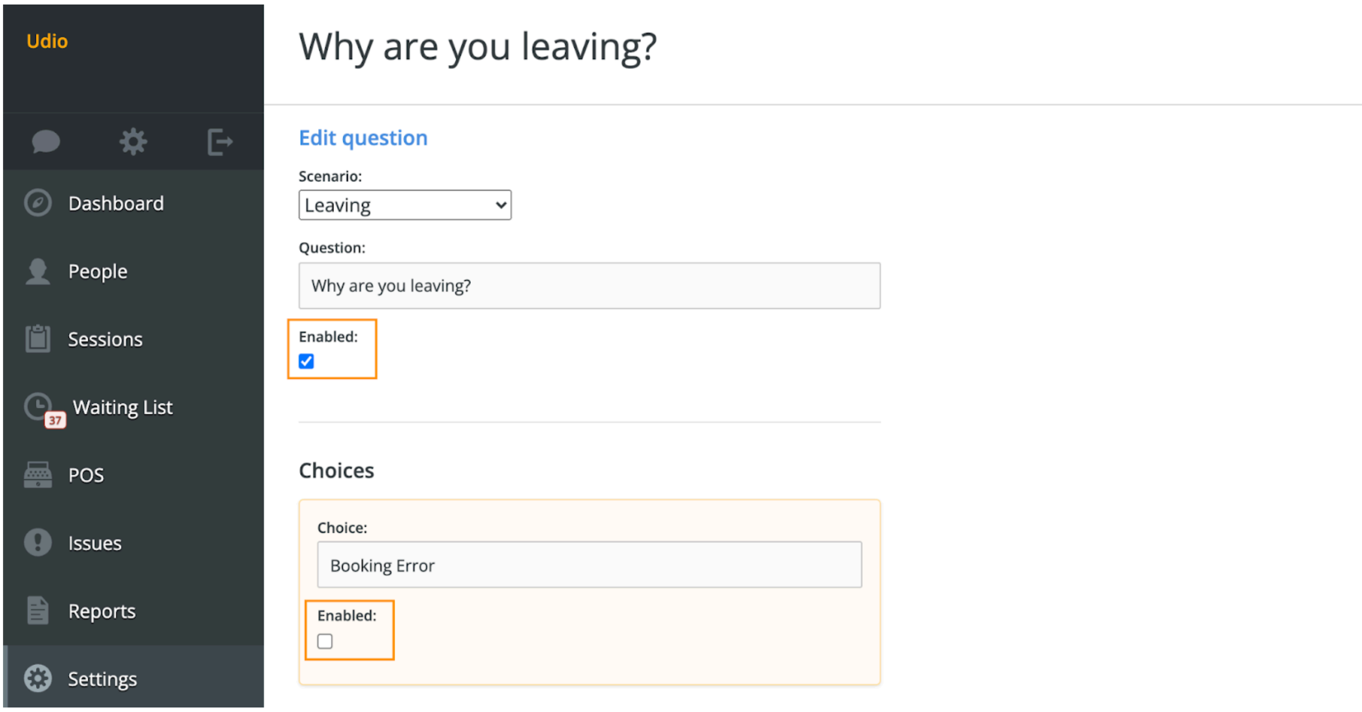
8.4.1 Adding new survey questions

- From settings, click on *'Configure survey questions'*
- Click on *'Add new question'*
- Choose from the scenario and type in the question
- Add another under *'Choices'*
- Type in the first choice and add another to repeat
- When finished, click on *'Confirm'*
- Repeat the process to add more questions



8.4.2 Editing survey questions

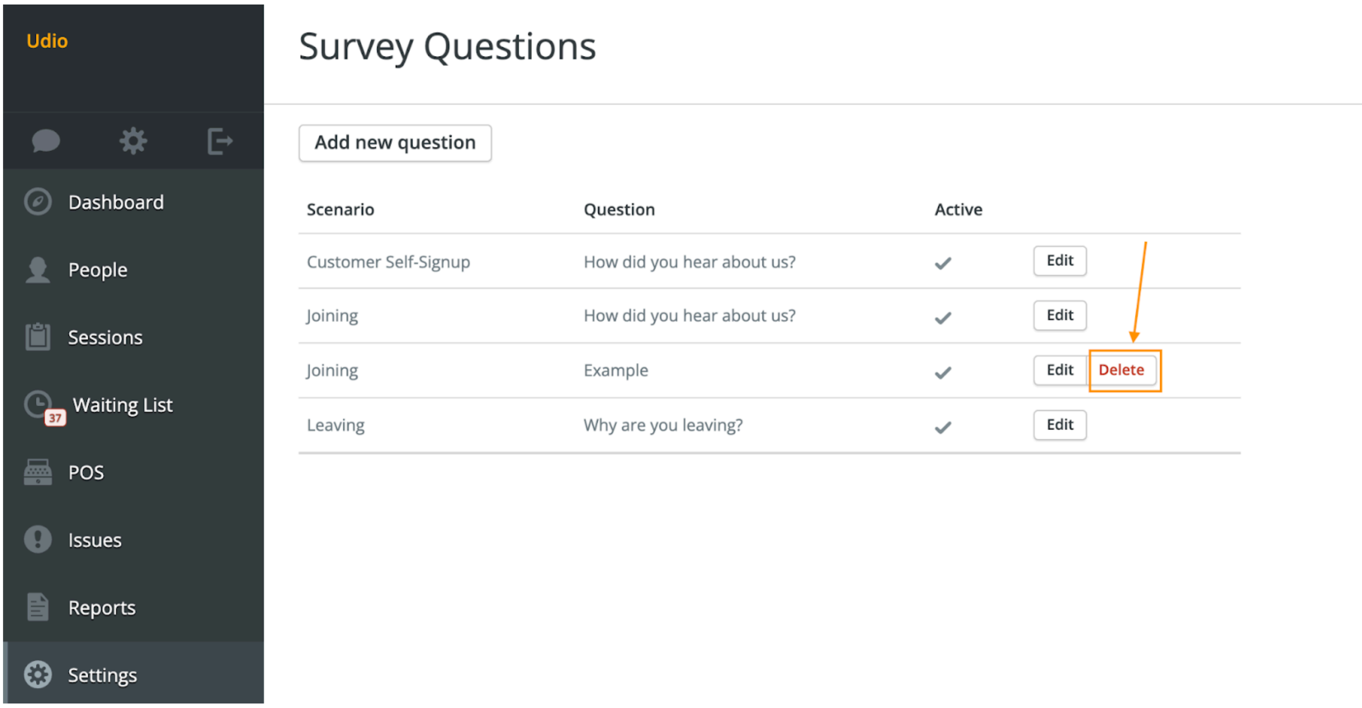
- From *'configure survey questions'*, click on *'Edit'*
- You can untick 'enabled' to disable the question or choice or add another choice
- Click *'Confirm'* when edit is complete



8.4.3 Deleting survey questions

Questions can be deleted if there are no prior answers, otherwise, you can just disable them.

- From '*configure survey questions*', click *'Delete'*
- Click *'Confirm'* to delete the question

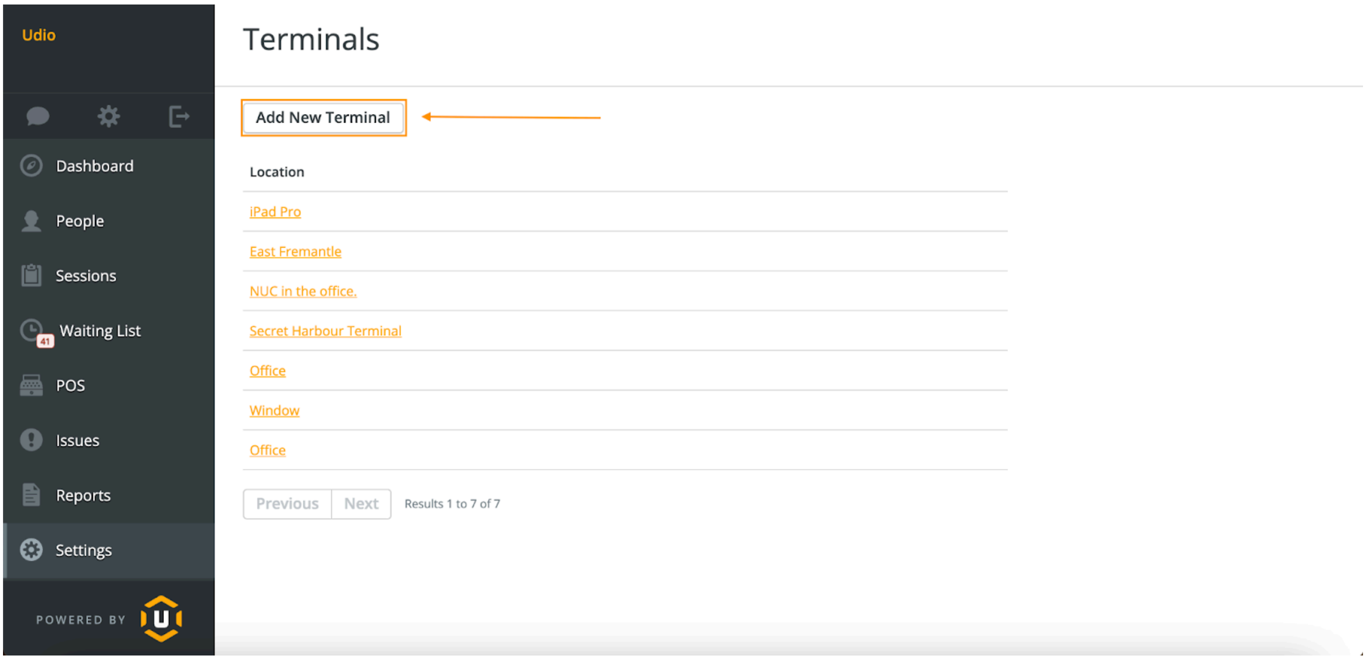


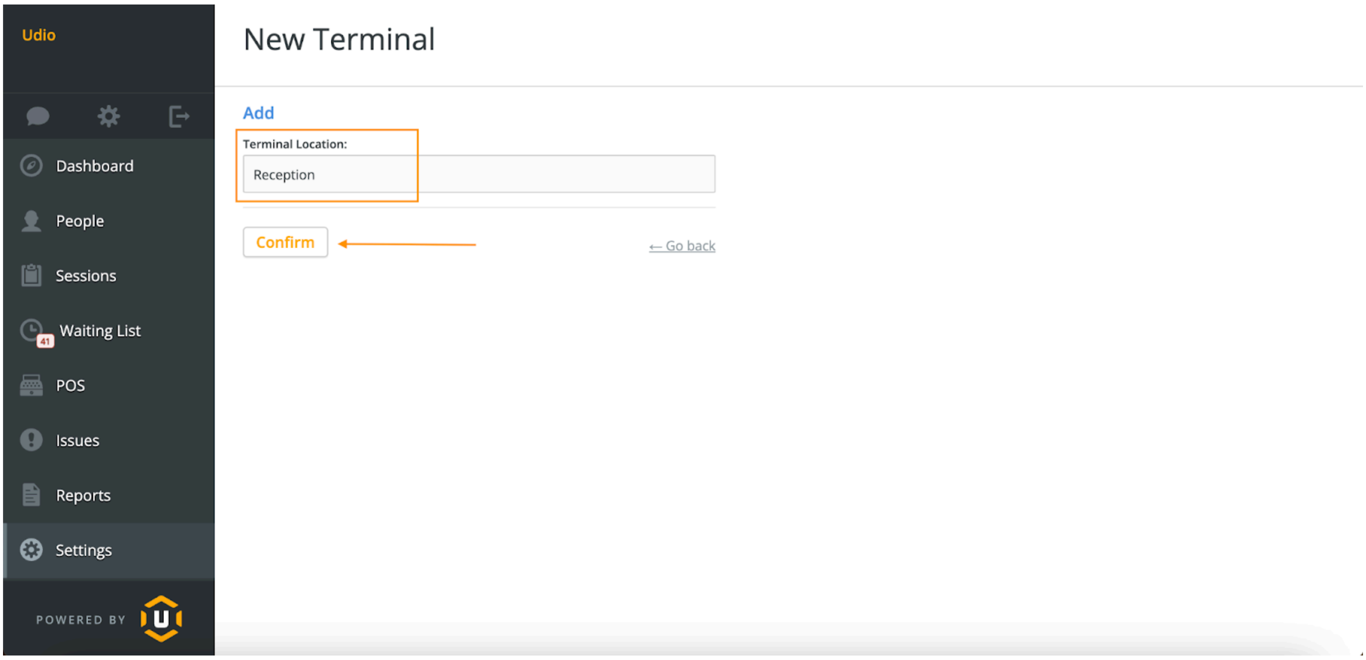
9. Self Check-in

After you've purchased the items for self check-in, you can download the app from the App Store. You will need an iTunes account (this can be a new or an existing account).

9.1 Terminals

- Configure self check-in by going to *'Terminals'* and clicking *'Add New Terminal'*
- Add the terminal location (e.g. reception, wall, floor mounted, etc.)
- Ensure it's active and click *'Confirm'*





9.1.2 iPad

You'll need to complete the setup on each individual device.

- Set up each iPad's iTunes account, ensuring the devices have the latest version of IOS

- Go to the app store and search ‘Udio Systems’
- Download the app called Check-in Kiosk with the Udio logo
- Enter the email and password for any staff member that can log into Udio (generic reception email is recommended) for a once-off login
- Select the terminal from the list and confirm selection
- You should now have the yellow scan screen and a box with the image from the front-facing camera

13.2 Self Check-In Settings

Here you can edit the terminal settings:

- Select whether touch is required
- Enable or disable check-in through the customer portal