



UDIO TRAINING

FRONT DESK OPERATIONS



Welcome to Udio's training guide for customer-facing operators.

This handy guide will walk you through Udio's core features that are typically used by reception and front desk staff on a day-to-day basis.

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

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

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

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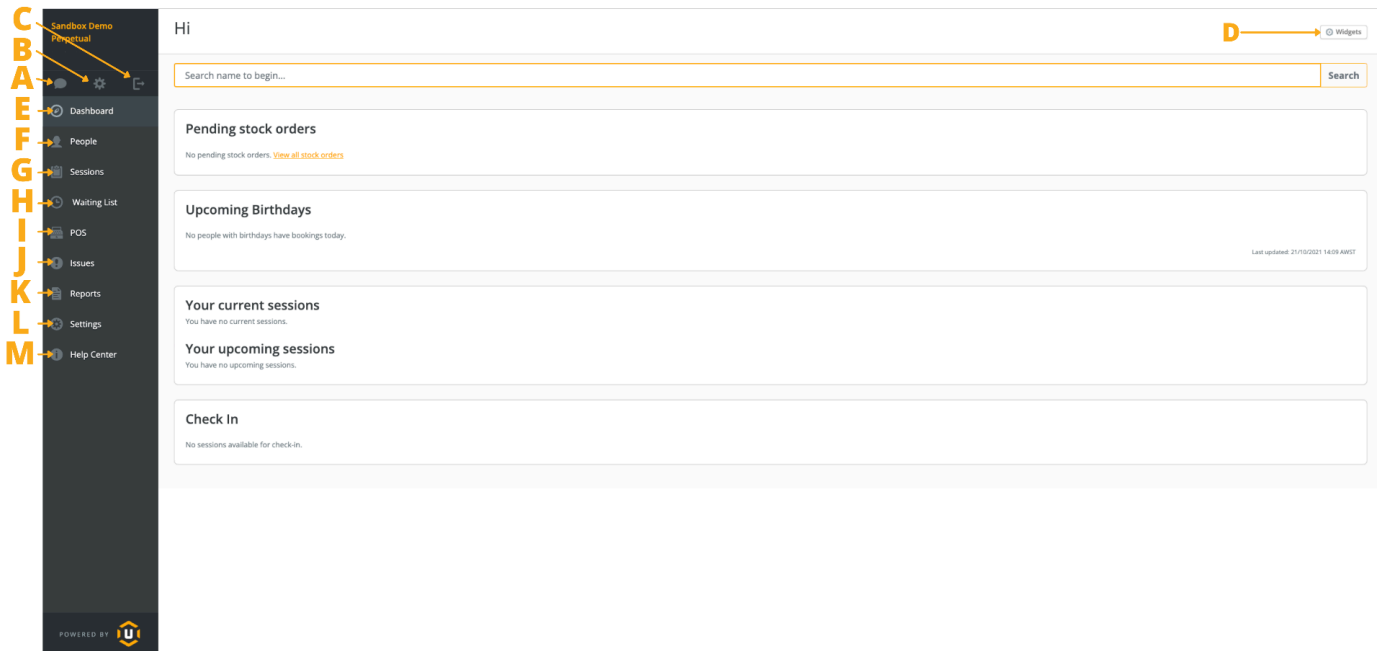


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1. Tour of Udio

Let's start by taking a quick look at the application home screen. Here's a visual snapshot indicating where each button and icon leads:



- A. **Feedback** - let us know how you're finding Udio
- B. **User settings** - edit your user profile, including timezone, language and facility preference
- C. **Logout** of Udio
- D. **Widgets** - select the widgets you want to add to your dashboard
- E. **Dashboard** - provides a snapshot of the upcoming day's events and relevant activity; you can also search for people using the search bar
- F. **People** - search, edit and manage account details of your customers and staff, including names, addresses, health information and any notes; see at a glance what bookings your customer has coming up, as well as their past attendance
- G. **Sessions** - shows active and upcoming sessions, viewable in list, sheet or calendar format; this is also where you'll add bookings and view the occupancy of each session (including how many students are permanently booked in, number of available spots and how many temporary vacancies are available for make ups)



- H. **Waiting list** - shows a list of students you've added to the waiting list; if their requested time becomes available, you can invite them to join the class
- I. **POS** (point of sale) - if you sell products, you can use the POS section to view stock levels and facilitate payments for items sold
- J. **Issues** - identifies any email bounces
- K. **Reports** - a snapshot of the facility/location, its activity and financial information, with easy access to all reports, such as booking statistics and outstanding invoices
- L. **Settings** - configure a range of settings including billing, courses and cancellation rules; *note: the customer portal link is also located in this section*
- M. **Help Centre** - useful articles and step-by-step guides to help you navigate the system

2. Login

- To access Udio, click the link provided via email (please contact hello@udiosystems.com if you need the link resending)
- To set or reset your password, click the prompt on the login page

Staff Login
[Customers Login](#)

Email address:

Password:

[Set \(or reset\) your password](#)

Not the account you are looking for?
[Login to a different account](#)

- To access the training version (where you can experiment without impacting your actual data) use the sandbox URL provided via email



2.1 First time user

- Once you've reset your password and logged on, update your timezone, language and preferred facility in **user settings** (B in the above visual)

2.2 Changing your password

- Go to user settings in Udio
- Click 'change password' in the top right-hand corner
- Type in your current password, followed by your new one
- Re-enter the new password and click 'confirm'
- A green box will appear indicating that your password has been changed

3. The dashboard

The dashboard gives you an overview of a variety of functions. You can customise what you see on your dashboard by clicking on the 'widgets' button in the top right-hand corner. You can move widgets from 'available' to 'show on dashboard' as well as move the widgets within the dashboard. Here's what each one shows:

3.1 People search

- You can search for a person from the search bar; type in full or partial name, email address or phone number - click 'search' or hit 'enter'

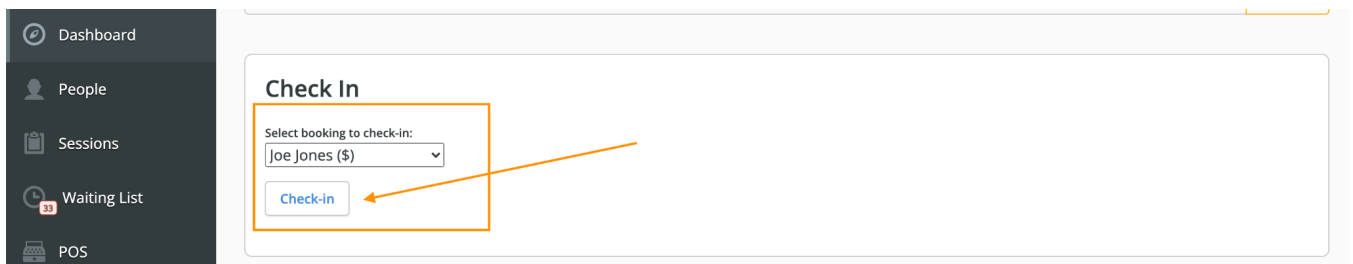
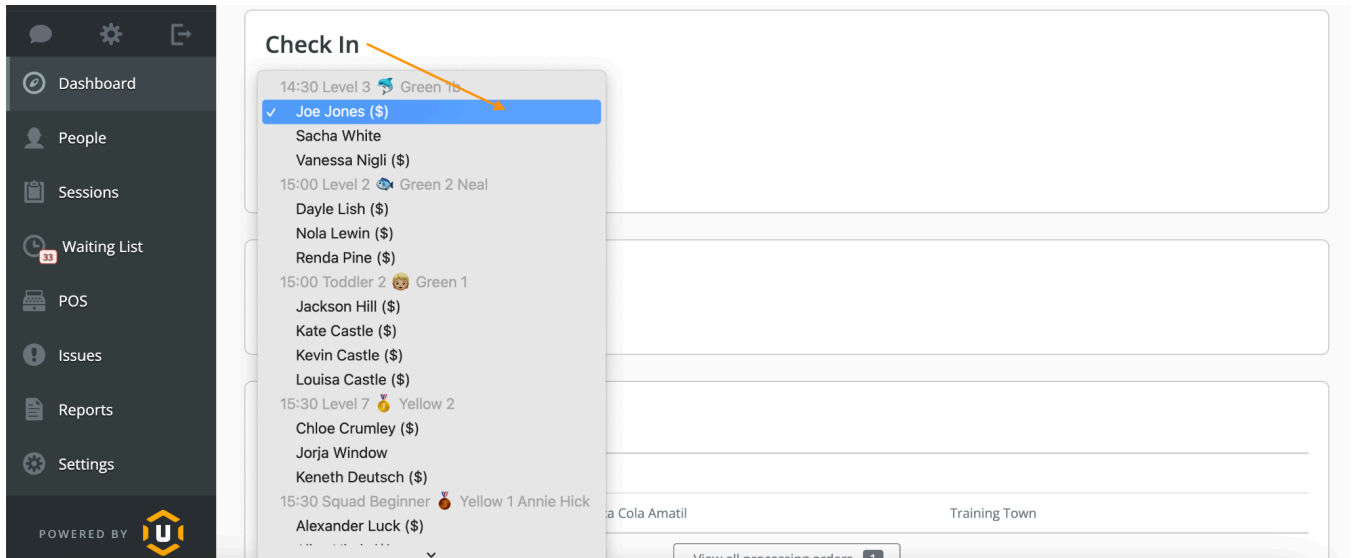


3.2 Check-in

- The check-in widget lets you check customers in as they arrive
- You will also see the resource information, as well as the teacher's name
- If the customer owes money, a (\$) symbol is displayed



- To check someone in, click on the drop-down box, select the student's name and click 'check-in'
- Once checked in, their name will appear in the 'recent people' widget for easy navigation



3.3 Recent people

- This is a hot button that you can click on to navigate to a person's people page and is activated when someone is checked in or people search conducted

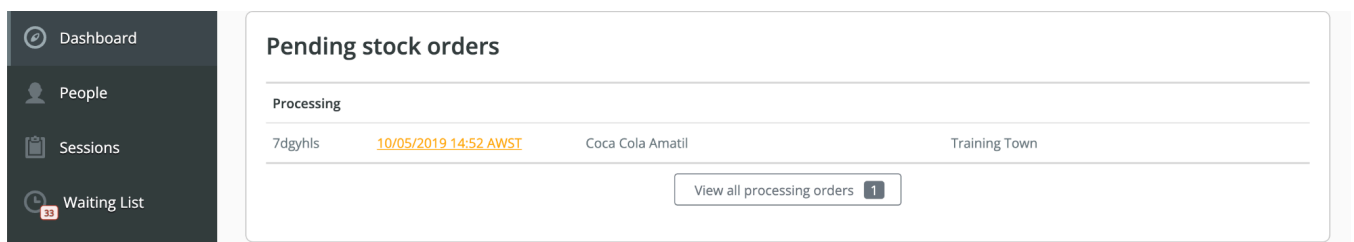


3.4 Issues (management only)

- You can add the 'issues' widget to your dashboard to see existing issues at a glance
- Issues are flagged as a result of incomplete/incorrect information entered into Udio
- For example, if Udio tries to email a customer and that email bounces, Udio will raise an issue so you can check and update the email address

3.5 Pending stock orders (management only)

- If you use POS in your business, the 'pending stock orders' section will display orders that have been created, processed, dispatched and received
- Add the widget to your dashboard for an overview of pending orders



Pending stock orders				
Processing				
7dgyhls	10/05/2019 14:52 AWST	Coca Cola Amatil	Training Town	

View all processing orders 1

3.6 New, leaving and returning customers

- Widget description - first & returning bookings
- **New** - booked in for their first lesson or new to the level
- **Leaving** - have no further sessions booked in
- **Returning** - customers who have booked in after a period of absence
- Along with the student's name, this section will also display the session and course details they are booked into



New, Leaving and Returning Customers


Session	Course	Person	
Fri 17/12/2021 15:00 Level 2 🏊 KINN Green 2	Level 2 🏊	Jennifer Parry	first session at training town, level 2 🏊 last session in level 2 🏊
Fri 17/12/2021 15:30 Level 7 🏊 320 Yellow 2	Level 7 🏊	Evie Lyttle	first session in level 7 🏊 returning
Fri 17/12/2021 15:30 Level 7 🏊 320 Yellow 2	Level 7 🏊	Jorja Window	first session at training town, level 7 🏊
Fri 17/12/2021 15:30 Squad Beginner 🏊 YVS5 Yellow 1	Squad Beginner 🏊	Raquel McGovern	first session at training town, squad beginner 🏊
Fri 17/12/2021 15:30 Squad Beginner 🏊 YVS5 Yellow 1	Squad Beginner 🏊	Dylan Jacka	first session at training town, squad beginner 🏊
Fri 17/12/2021 15:30 Squad Beginner 🏊 YVS5 Yellow 1	Squad Beginner 🏊	Tom Lewin	first session at training town, squad beginner 🏊


3.7 Upcoming sessions


- Displays the next five sessions assigned to the logged-in user
- Automatically shows current sessions above upcoming

3.8 Today's achievements

- Displays any achievements accomplished by a student on that day, with the most recent achievement showing first


 People

 Sessions



33

Waiting List

 POS

Today's Achievements

Person	Age	Facility	Time	Achievement
Abbey Tornatora See all	None	Training Town	29/10/2021 14:23	Babies 1 🏊 : Learning Torpedo
Lilya Katwishi-Ngandwe See all	10 years	Training Town	29/10/2021 14:23	Babies 1 🏊 : Freefall 🏊

3.9 Today's course completions

- Shows any course completions (moving up a course) accomplished by a student on that day, with the most recent course completion displayed first

3.10 Today's free bookings

- Displays all free bookings, such as assessments

3.11 Birthdays

- Highlights people who have a birthday that week



- This is also noted at the time of check-in via the widget and via the self check-in terminal

<ul style="list-style-type: none"> Sessions Waiting List POS Issues 	Upcoming Birthdays				
	Person	Age	Birthday	Session	Facility
	Ronna Shoe	7 years	25/10/2014	Mon 25/10/2021 10:00	Training Town Green 2
	Last updated: 25/10/2021 09:45 AWST				

3.12 Customer contact

- Highlights customers that have not been contacted (or spoken to in x number of days)
- Helps shift supervisors identify who they need to speak to while on shift

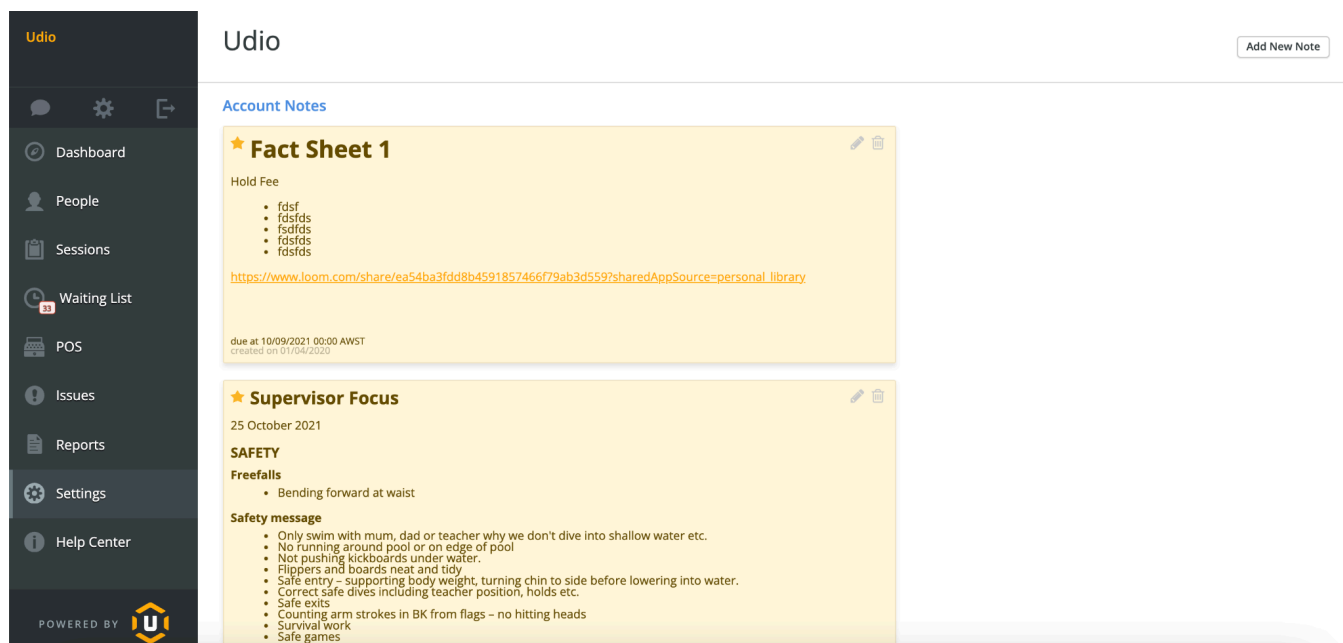
3.13 Notes

- You can set up notes to be visible at a single or multiple facilities
- They are used to relay information to staff who are using Udio and can be found at the bottom of the dashboard

<ul style="list-style-type: none"> Dashboard People Sessions Waiting List POS Issues Reports Settings 	Supervisor Focus	
	25 October 2021	
	SAFETY Freefalls <ul style="list-style-type: none"> Bending forward at waist 	
	Safety message <ul style="list-style-type: none"> 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 	

- Notes can only be created by people who have been assigned permission to do so - access by going to Settings → Account → Edit notes





4. Customer enquiries

4.1 Customer enquiry

When a customer has a question regarding their booking, account or details:

- Go to dashboard or people section to do a search
- Enter either the family name, first and last name of a child/parent, email address or phone number; you can also scan a membership card
- Click search or hit enter
- Select the correct customer; if two customers have the same name, you can identify each by DOB, next booking details, facility or membership card number
- Each person has their own people page containing their information - click on the name to view details (note: the entire family are attached to the same billing account)

From here, you can view all the customers' information such as date of birth, contact details, relationships, current balance, upcoming and previous lessons, achievements and course completion information, health issues and notes. View and add vouchers such as



make up and lap/public swimming. You can also add, move and remove bookings, as well as make a payment.

The screenshot shows the Udio software interface for a user named Mazie White. The interface is divided into a sidebar on the left with navigation options (Dashboard, People, Sessions, Waiting List, POS, Issues, Reports, Settings, Help Center) and a main content area. The main content area displays the 'Member Details' for Mazie White, including fields for Date of birth, Card ID, Payment Method, Achievements, Course Completion, Personal Results, and Activity. To the right of the member details is a 'Billing Account' section showing a current balance of \$0.00 and a 'View Billing Account' link. Further right, there are sections for 'Contact Details', 'Customer Contact', 'Relationships', 'Health Issues', 'Qualifications', and 'Notes'. The bottom of the page shows 'Bookings'.

4.2 View billing account

To view an individual's billing account:

- Follow the steps above
- Click on 'view billing account' (next to 'billing account') on the people page

You can view the billing account for all the associated people. Remember, a family should be on the same billing account and not individual ones. You can also have more than one bill payer.

The screenshot shows the Udio software interface for a user named Mazie White. The interface is divided into a sidebar on the left with navigation options (Dashboard, People, Sessions, Waiting List, POS, Issues, Reports, Settings, Help Center) and a main content area. The main content area displays the 'Member Details' for Mazie White, including fields for Date of birth, Card ID, Payment Method, Achievements, Course Completion, Personal Results, and Activity. To the right of the member details is a 'Billing Account' section showing a current balance of \$0.00 and a 'View Billing Account' link. Further right, there are sections for 'Contact Details', 'Customer Contact', 'Relationships', 'Health Issues', 'Qualifications', and 'Notes'. The bottom of the page shows 'Bookings'. An orange arrow points from the 'View Billing Account' link in the 'Billing Account' section to the 'View Billing Account' link in the 'Billing Account' section.



4.2.1 Information within the billing account

- View financial activity by going to 'view all activity'
- View the current balance
- Make a payment
- Add credit
- View invoices (you can also email or print out closed invoices)
- View number of make ups and session vouchers
- Purchase information
- Add and view direct debit and billing group information, as well as credits (both outstanding and used)
- View or add notes



Billing Account **32a6q7y4**[Re-Charge](#)

CURRENT BALANCE

\$0.00

Make Payment



View Invoices



Add Credit

Recent activity

[View All Activity](#)

Date & time	Description	Value
01/10/2021 03:17 AWST	Payment (Recurring Payments: Credit Card Visa ...4242 09/2023)	\$95.00
01/10/2021 00:01 AWST	Learn To Swim (October 2021 / Sacha White)	-\$95.00
07/09/2021 10:55 AWST	Payment (Payment taken at Head Office: Payment taken at Head Office)	\$85.00
01/10/2021 00:00 AWST	Babies (October 2021 / Lupe White)	-\$85.00
01/09/2021 03:18 AWST	Payment (Recurring Payments: Credit Card Visa ...4242 09/2023)	\$180.00

Payment Settings [Change](#)

Automatic Payments	Allowed
Billing Group	—
Payment Method	Available Manage
Active since:	28/06/2019

Vouchers

[Add New](#)[View All](#)

No vouchers available.

Purchases

[Add New Purchase](#)[Add New Charge](#)

Name	For	Created	Active	Last charge	Next charge
Waterbabies Casual, Training Town	Lupe White	01/10/2020	✓	01/10/2020	
SWIMVAC 5 days, Training Town	Sacha White	28/06/2019	✓	01/07/2019	
Learn To Swim, PFFT Level 3 🏊 Friday 14:30, Training Town	Sacha White	28/06/2019	✓	01/10/2021	01/11/2021
Babies, QE17 Babies 1 🏊 Tuesday 09:00, Training Town	Lupe White	28/06/2019	✓	01/10/2021	01/11/2021

People

[Add person](#)**Lupe White** *family*[Babies, QE17 Babies 1 🏊 Tuesday 09:00, Training Town](#)**Mazie White***emergency contact
responsible person
family bill payer***Sacha White** *family*[Learn To Swim, PFFT Level 3 🏊 Friday 14:30, Training Town](#)

Credits

Training Town: \$0.00

Notes

[Add New](#)

No notes.



4.2.2 View people attached to the billing account

- On the right-hand side of the billing account is all the people associated with that account along with their booking information
- Click on the name of the customer and this will take you to their people page

The screenshot shows the 'Billing Account' page for '1unk1jpe'. The current balance is \$0.00. There are three buttons: 'Make Payment', 'View Invoices', and 'Add Credit'. On the right, under the 'People' section, there is a list of people associated with the account:

- Inger Boatright** (family) - Learn To Swim, 9VCL Toddler 1, Friday 11:00, Training Town
- Kandi Boatright** (emergency contact, responsible person, family, bill payer) - Learn To Swim, SBTN Transition, Friday 12:00, Training Town
- Porter Boatright** (family) - Learn To Swim, SBTN Transition, Friday 12:00, Training Town

4.2.3 View number of vouchers

- At a glance, you can see how many make up vouchers there are as well as session passes
- Select 'view all' to view all available vouchers as well as closed or expired vouchers; closed vouchers will display which session they were used in

The screenshot shows the 'Billing Account' page with a sidebar menu on the left. The current balance is \$0.00. The 'Recent activity' section shows a table of transactions:

Date & time	Description	Value
01/10/2021 03:15 AWST	Payment (Recurring Payments: Credit Card Visa ...4242 08/2024)	\$190.00
01/10/2021 00:02 AWST	Learn To Swim (October 2021 / Porter Boatright)	-\$95.00
01/10/2021 00:02 AWST	Learn To Swim (October 2021 / Inger Boatright)	-\$95.00
01/09/2021 03:15 AWST	Payment (Recurring Payments: Credit Card Visa ...4242 08/2024)	\$190.00
01/09/2021 00:06 AWST	Learn To Swim (September 2021 / Porter Boatright)	-\$95.00

The 'Payment Settings' section shows:

- Automatic Payments: Allowed
- Billing Group: —
- Payment Method: Available (Manage)
- Active since: 16/09/2020

The 'Vouchers' section shows:

- 1 x Make Up (View)
- 17 x Lap Swimming (View)

4.3 Viewing sessions and availability

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



- To find information based on the customer enquiry, you can filter by course or courses, weekday, facility or by date and time or staff member as well as permanent or temporary spots
- Note: you don't have to use all filters; you can select whatever filter is applicable
- When entering information, remember you can enter more than one course at a time - this is useful when you have multiple students from the same family looking to get lessons at the same time
- You will see how many have been booked in, how many permanent spots (blue) are available and how many temporary spots (red) are available; you can also use the filters to only view temporary spots
- Click 'view details' for more information about the session, including course type, session time and duration
- If the session has any issues (e.g. you have no students booked in) you will be alerted by a message at the top of the screen

Scheduled sessions

[Add New](#) [Cancel Sessions](#) [Sheets](#) [Calendar](#)

Courses:

Code:

Facility:

Weekday:

From date:

From time:

To time:

With spot:

Staff Member:

Staff Booking Type:

Only active sessions: ☒

Only upcoming sessions: ☒

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

Tuesday 26th October 2021

30 mins 07:15 to 07:45
Babies 1 **SNYE**
Training Town: Green 1

▼ Add Student 3 Spots 1 of 4 booked

▼ Add Instructor 1 Spot

▼ Add Supervisor 1 Spot

View Details

30 mins 09:00 to 09:30 (\$)

Toddler 1 **HUBR**
Training Town: Green 1

▼ Add Student 1 Spot 3 of 4 booked

▼ Add Instructor 1 Spot

▼ Add Supervisor 1 Spot

View Details

30 mins 09:00 to 09:30 (\$)

Babies 1 **QEIZ**
Training Town: Green 2, Green 3

▼ Add Student 5 Spots 3 of 8 booked

Instructor: No Spots Alison Auld

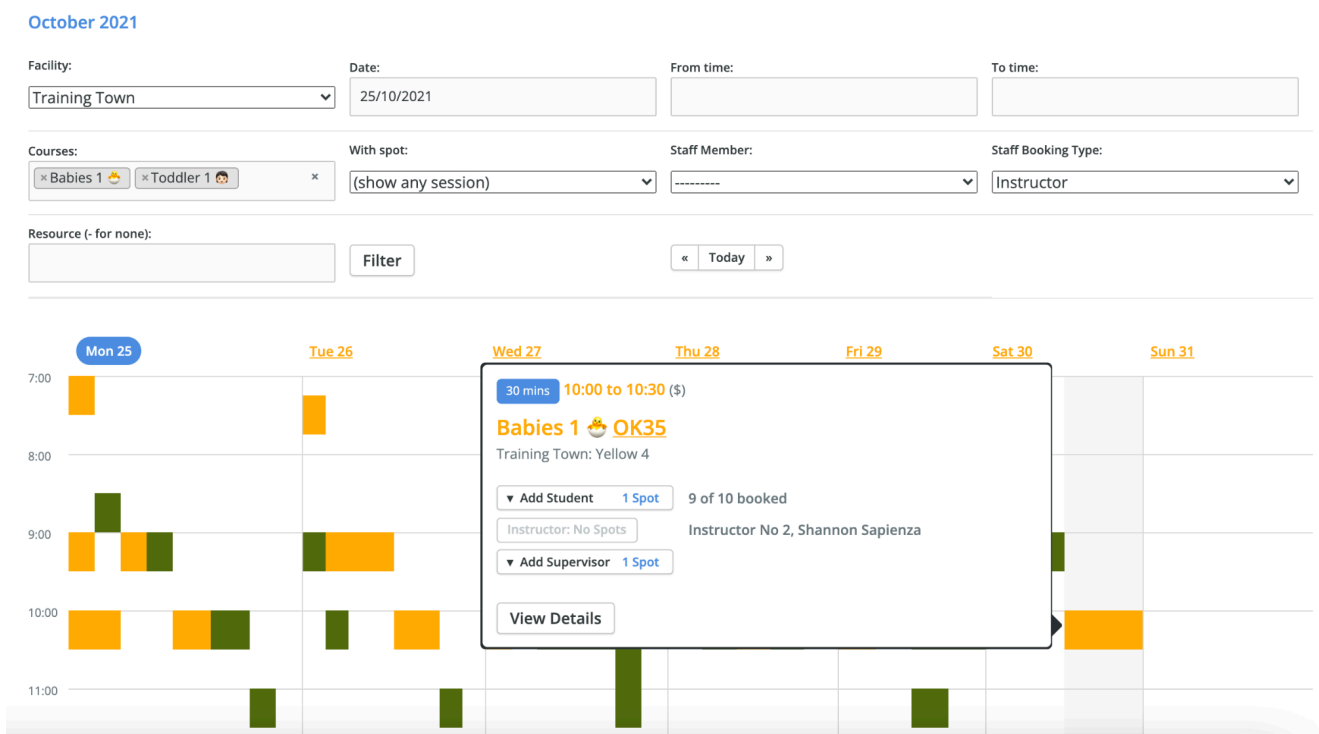
▼ Add Supervisor 1 Spot

View Details



4.3.1 Calendar

- Click on the calendar button on the top right-hand side of the sessions page for a calendar view of scheduled sessions
- You have filters for courses and times, with a weekly view as well as daily and expanded day
- Click on each block for a quick snapshot, including session length, course and available spots



4.3.2 Sheets

- Sheets (next to calendar in the top right-hand corner) breaks down sessions and highlights attendance, non-attendance, achievements and notes
- Use the key at the bottom of the page to identify attended/achieved, missed and cancelled sessions
- This is also where you can download sheets in Excel or other formats and print



Sheets

Facility: Date: Staff Booking Type: Staff Member:




For courses: Show: Pagination:

25/10/2021
Monday 08:30 Toddler 1
Instructor: Abigail Sovann
JZWR Yellow 3

		Course Start	02 Aug	09 Aug	16 Aug	23 Aug	30 Aug	06 Sep	13 Sep	20 Sep	27 Sep	04 Oct	11 Oct	18 Oct	25 Oct	
Adele Towns (\$)		25/03/2019														Solo Swim with Floats
Bush Bull (\$)	5y 2m	16/07/2018														15m Swim with Floats
Josef Keck (\$)		25/03/2019														
Ted Burket (\$)		25/03/2019														

25/10/2021
Monday 12:00 Babies 2
Instructor: —
3G21 Green 1

		Course Start	02 Aug	09 Aug	16 Aug	23 Aug	30 Aug	06 Sep	13 Sep	20 Sep	27 Sep	04 Oct	11 Oct	18 Oct	25 Oct	
Geneva	2y 8m	—														Torpedo
Hot Franks (\$)	5y 3m	07/09/2018														Freeroll
Na Brant	2y 8m	—														Climbing out of Pool Unaided
																Jump
																Swim

Attended/Achieved 
 Missed 
 Cancelled 

4.4 View activity

- If a customer queries something on their account such as movements, booking a regular lesson, raised invoices or an email that wasn't received, you can view all their activity via their people page
- Under member details, click 'view activity'
- You can resend an email or view the activity during a period of time or a type of activity



4.5 Unsubscribe or subscribe to emails

- While customers can unsubscribe from the emails they receive, there might be times when you're asked to do this on the customer's behalf; there may also be times when a customer wants to resubscribe
- Go to the people page (depending on what type of email, it could be the parent or student)
- Next to the customer's email address is a subscription button; click on it and update the emails they do or do not wish to receive

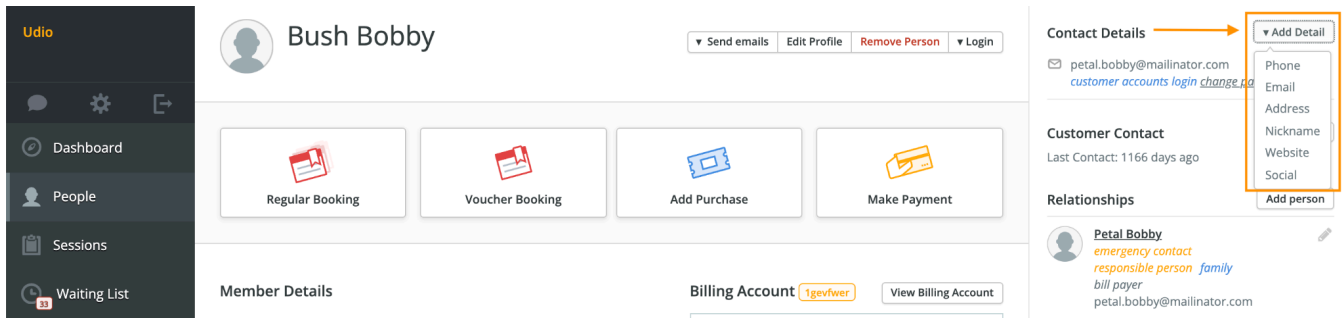
5. Add and edit

To add or change details, go to the people page of the customer you want to update or view.

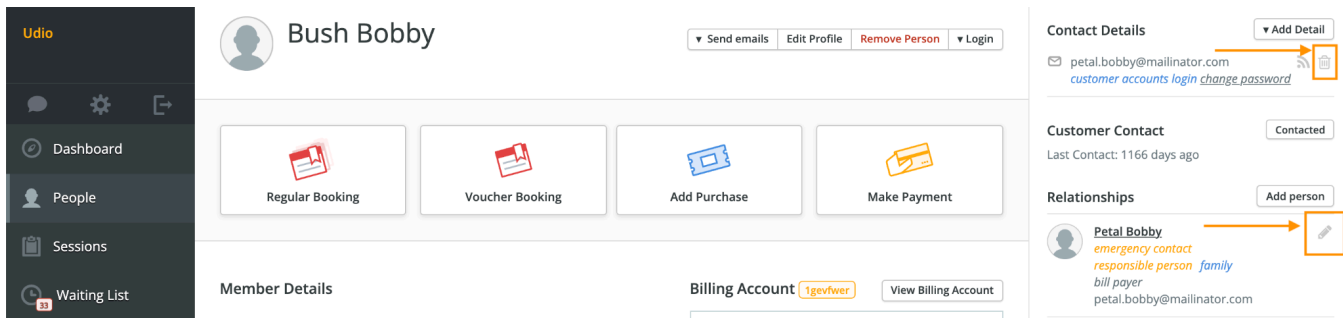


5.1 Add/edit contact information

- To add contact information, click on 'add detail' next to 'contact details' on the right-hand side of the page, select the contact type and add the information

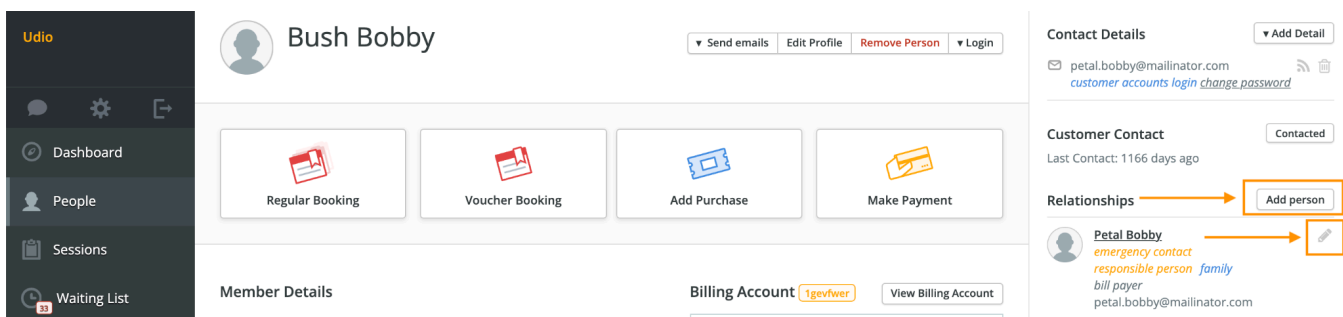


- To edit existing information, click on the pen, make the change and click 'confirm'
- To delete, click on the trash can and 'confirm'



5.2 Add/edit relationships

- To add a relationship, click on 'add person', complete the details and click 'confirm' - the related party will be added to the billing account
- You can edit by clicking on the pen and clicking 'confirm'



People

Add Person to Billing Account 1gevfwer

Existing people: [Buddy Bobby](#), [Bush Bobby](#), [Petal Bobby](#), [Rose Bobby](#)

Title:

Preferred name:

Full name:

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

Gender:

Date of birth:

Billing Group:

Family:
☒

Bill Payer:
☐

Responsible Person:
☐

Emergency Contact:
☐

Facility:

How did you hear about us?

Image:
 No file chosen

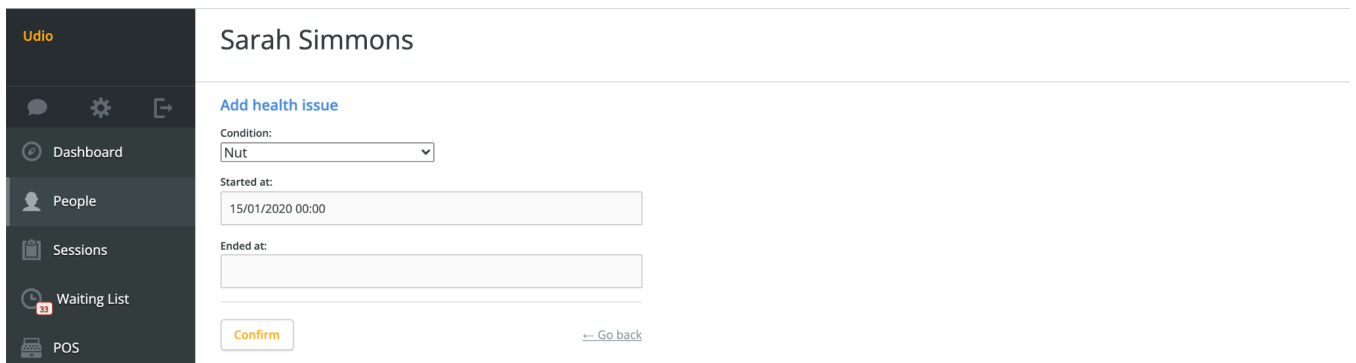
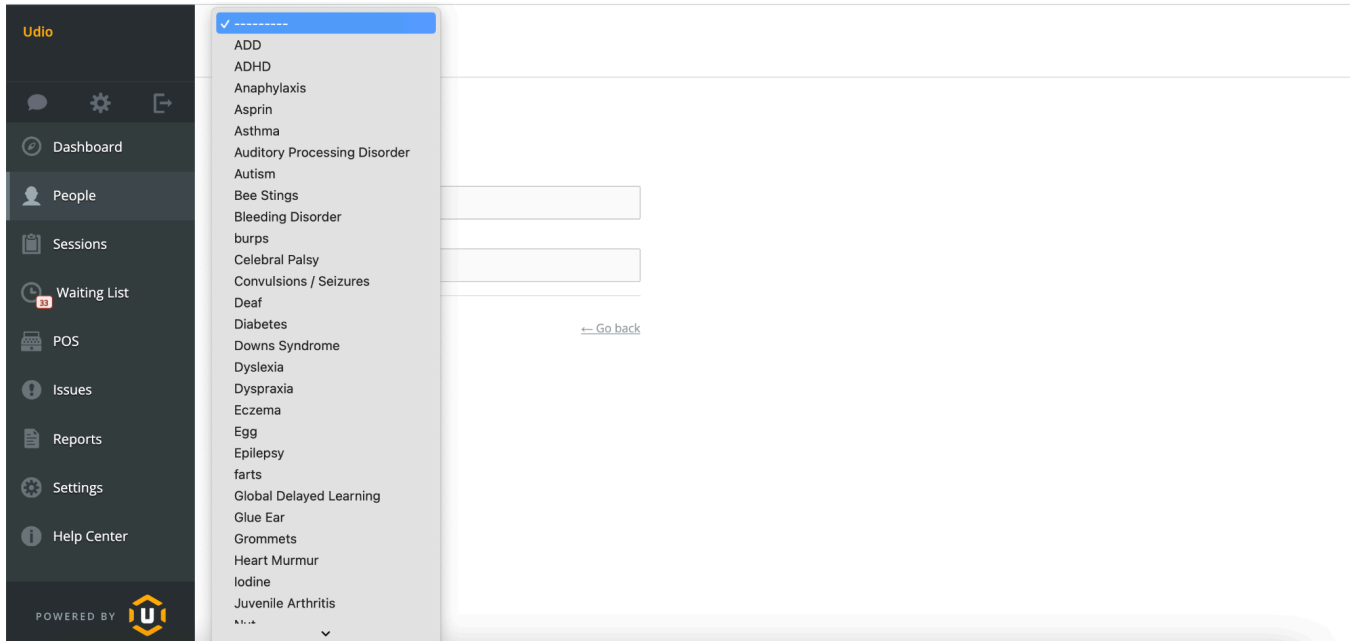
[Confirm](#) [Go back](#)

5.3 Add/edit health issues

- Click on the 'people' section, search for their name and open their page
- Click on 'add issue', select the condition from the drop-down menu and add a start and end date if required

The screenshot displays the Udio app interface. On the left is a dark sidebar with navigation options: Udio, Dashboard, People, Sessions, Waiting List, POS, Issues, and Reports. The main content area is divided into several sections. The 'Active Purchases' section shows a purchase for 'Babies, 2SXY Babies 1' on Wednesday 09:30 at Training Town, with a next charge on 28/10/2021. Below this is a 'Bookings' section with buttons for 'Add Bookings', 'Move', 'Remove', and 'View all' (294). The 'Upcoming Bookings' section shows a booking for 'Wed 27/10/2021 09:30' for 'Babies 1' at Training Town. On the right, a user profile for Sarah Simmons is shown, including her name, family name, and phone number. The 'Health Issues' section is highlighted with an orange box and contains an 'Add Issue' button. Other sections like 'Qualifications', 'Notes', and 'Question answers' are also visible.





- To edit, click on the pen
- To add an image or PDF, click on the box with the + sign in it, enter the details, name the file and 'choose file' to upload before clicking 'confirm'
- A number indicates a health issue which will change depending on how many health issues are listed
- Health issues are also displayed on the 'sessions' screen
- To delete the issue, click on the trash can and confirm



Health Issues 2

Add Issue

Asthma
allergies



Nut
food From: 15/01/2020



5.4 Add/edit a note

There are two types of notes: course and personal. Course notes show up on the sessions and sheets pages. Personal notes are displayed as a label on the sessions page. You can add or edit a note on either the 'people' page or 'billing account'.

- To add a note, click on 'add note' on the right-hand side of the page
- Complete the note and add an attachment if necessary
- To edit, click on the pen
- To delete, click on the trash can and click 'confirm'
- If you star a personal note, it will appear on the sessions page



5.5 Add/edit bill payer

- To add a bill payer, click 'edit profile' at the top of the account, tick the 'bill payer' checkbox and click 'confirm'
- There can be multiple bill payers on an account



Udio Miss Sarah Simmons

Send emails Edit Profile Remove Person Login

Contact Details Add Detail

9339 4518 [landline](#)

Edit Person

Title: Miss

Preferred name: Sarah

Full name: Sarah Simmons

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

Gender: Female

Date of birth: 09/05/2014

Billing Group:

Family:

☒ Bill Payer:

Responsible Person:

Emergency Contact:

New Billing Account:

To move person to another billing account, enter its code here.
Current billing account: cfe2lgk

Image: Choose file No file chosen

Confirm Go back

5.6 Add/edit/delete membership card

Membership cards can be used at our self check-in terminal as a quicker way for the customer to check-in, as well as at the front desk. A membership card can be added for each person that has a booking or on the bill payer's people page, which checks in all family members with the one card.

Under 'member details':

- Click on 'manage membership cards'
- Select 'add membership card'
- Enter the card number or scan in the details if you have a barcode scanner
- You can also edit or delete details



[Sessions](#)
[Waiting List](#)
[POS](#)
[Issues](#)
[Reports](#)
[Settings](#)
[Help Center](#)

Member Details

Date of birth

Card ID [Manage Membership cards](#)

Payment Method Unavailable [Manage Payment Methods](#)

Achievements [View Achievements](#)

Course Completion [View Completion Records](#)

Personal Results [View Results](#)

Activity [View Activity](#)

Billing Account

18keg70p [View Billing Account](#)

Current Balance

\$0.00

No active purchases

Tracy Flynn has no vouchers [Add](#)

5.7 Add achievements and course completions

There are two different sections where you can add achievements and course completions; on the people page of the student or sessions page

- Click on 'view achievements' then 'add new record'
- Select the relevant achievement (you can select multiple at the same time)
- Select the relevant facility
- Amend the date if necessary and click 'confirm'

[Sessions](#)
[Waiting List](#)
[POS](#)
[Issues](#)
[Reports](#)
[Settings](#)
[Help Center](#)

Member Details

Date of birth

Card ID [Manage Membership cards](#)

Payment Method Unavailable [Manage Payment Methods](#)

Achievements [View Achievements](#)

Course Completion [View Completion Records](#)

Personal Results [View Results](#)

Activity [View Activity](#)

Billing Account

18keg70p [View Billing Account](#)

Current Balance

\$0.00

No active purchases

Tracy Flynn has no vouchers [Add](#)

Tracy Flynn

[Go back](#)

Achievement completion records

No achievement completion records to display

[Add new record?](#)

[Add New Records](#)



Tracy Flynn

Add achievement completion records

Add Achievements:

* Babies 1 🏆 : Learning Torpedo

Facility:

Training Town ▼

Completed at:

25/10/2021 13:27

Confirm

[← Go back](#)

The same process occurs to add a course completion:

- Click on 'view completion records' and 'add new record'
- Select the relevant course from the dropdown box
- Select the relevant facility
- Amend the date if necessary and click 'confirm'

The screenshot shows the Tracy Flynn member dashboard. On the left is a sidebar with navigation links: Dashboard, People, Sessions, Waiting List (with a red badge showing '33'), POS, Issues, and Reports. The main content area is titled 'Member Details' and contains several sections: Date of birth, Card ID (with a 'Manage Membership cards' button), Payment Method (Unavailable, with a 'Manage Payment Methods' button), Achievements (with a 'View Achievements' button), Course Completion (highlighted with an orange box and an arrow pointing to a 'View Completion Records' button), Personal Results (with a 'View Results' button), and Activity (with a 'View Activity' button'). On the right, there is a 'Billing Account' section showing a current balance of \$0.00 and a note that Tracy Flynn has no vouchers.

Tracy Flynn

[← Go back to person details](#)

Course completion records

Add new record

No course completion records to display. [Add new record?](#)



Add course completion record

Course:

Facility:

Completed at:

[Confirm](#) [← Go back](#)

This information is displayed on your dashboard under 'today's achievements' and 'course completions'.

5.8 Add family to a billing group

- Go to the people page of one of the existing family members
- On the right-hand side of the screen there is a field called 'relationships' – next to that, click 'add person'
- Complete the fields and confirm to add person to the family and billing account



People

Add Person to Billing Account 1hamk8aq

Existing people: [Elisha Seals](#), [Robert Seals](#)

Title:

Preferred name:

Full name:

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

Gender:

Date of birth:

Billing Group:

Family:
☒

Bill Payer:
☒

Responsible Person:
☐

Emergency Contact:
☐

Facility:

How did you hear about us?

Image:
 No file chosen

[← Go back](#)

5.9 Add/edit direct debit information

- Navigate to the person's billing account, ensuring all contact information is updated and correct
- Under 'payment settings' check that 'automatic payments' is set to 'allowed'; if not, click on 'change' and tick 'allow automatic payments'
- Click 'manage'
- Click on 'add new DDR' or 'add credit or debit card' (note: this may differ depending on your payment provider)
- Ensure the facility is correct and click 'proceed'
- Follow the prompts to complete the form



Billing Account ecsy5

Re-Charge

CURRENT BALANCE

\$ -85.00

Make Payment

View Invoices

Add Credit

Recent activity

View All Activity

Date & time	Description	Value
28/09/2021 00:02 AWST	Babies (September 2021 / Adam Connolly)	-\$85.00
28/08/2021 00:00 AWST	Babies (August 2021 / Adam Connolly)	-\$85.00
28/07/2021 00:00 AWST	Babies (July 2021 / Adam Connolly)	-\$85.00
28/06/2021 00:04 AWST	Babies (June 2021 / Adam Connolly)	-\$85.00
28/05/2021 00:05 AWST	Babies / 202105 (Adam Connolly)	-\$85.00

Payment Settings

Change

Automatic Payments

Allowed

Billing Group

—

Payment Method

Available

Manage

Active since:

07/11/2013

Vouchers

Add New

View All

People

Add person

Adam Connolly

family

Babies, Cric3r Babies 1 Saturday 10:00, Training Town

Aisha Connolly

family

Che Connolly

family

Samson Connolly

emergency contact

responsible person family bill payer

Credits

Training Town: \$0.00

Notes

Add New

No notes.

Payment Methods

Billing Account 1ca12ng2

Add Credit or Debit Card

Stripe

Payment Method	Facilities
Credit Card Visa ...4242 02/2021	All Facilities <div>Delete</div>

Go back

5.10 Add/edit vouchers

- In the billing account, click on 'add new', under vouchers, select the voucher type such as make up or lap swimming, choose the person and add an expiry date if applicable, then click 'confirm'
- To delete, click on 'view all' next to the voucher to be deleted, click 'edit', then 'delete' and 'confirm'



Billing Account 1k20rehm

[Re-Charge](#)

CURRENT BALANCE

\$ -160.00

[Make Payment](#)[View Invoices](#)[Add Credit](#)

Recent activity

[View All Activity](#)

Date & time	Description	Value
25/10/2021 00:00 AWST	Term Based pricing (25/10/2021 - 19/12/2021 / Mazie Alto)	-\$160.00
25/10/2021 00:00 AWST	Term Based pricing (25/10/2021 - 19/12/2021 / Marleen Alto)	-\$160.00
09/08/2021 00:00 AWST	Term Based pricing (09/08/2021 - 26/09/2021 / Mazie Alto)	-\$140.00
09/08/2021 00:00 AWST	Term Based pricing (09/08/2021 - 26/09/2021 / Marleen Alto)	-\$140.00
31/05/2021 00:00 AWST	Term Based pricing / 31 / 05 / 2021 - 01 / 08 / 2021 (Mazie Alto)	-\$180.00

Payment Settings

[Change](#)

Automatic Payments Allowed

Billing Group —

Payment Method Unavailable

[Manage](#)

Active since: 18/02/2021

Vouchers

[Add New](#)[View All](#)

1 x Make Up

[View](#)

1 x Kickstart Program

[View](#)

1 x Private Lessons

[View](#)

People

[Add person](#)

Marleen Alto family

Term Based pricing, J84L Term Based Level 2 Saturday 09:00, Term Based



Mazie Alto family

Term Based pricing, M53U Term Based Level 2 Sunday 11:00, Term Based



Tiffany Alto emergency contact responsible person family bill payer

Credits

Term Based: \$0.00

Notes

No notes.

[Add New](#)

Add Vouchers

Add Vouchers

Type:

Lap Swimming

Person:

Mazie Alto

Expires at:

30/10/2021 00:00

Number:

1

Number of identical vouchers to create

[Confirm](#)[← Go back](#)

Edit Voucher

[Delete](#)

Edit Voucher

Type:

Kickstart Program

Person:

Mazie Alto

Expires at:

11/01/2022 00:00

[Confirm](#)[← Go back](#)

6. Attendance

6.1 Checking a customer in

Udio offers a [self check-in module](#) which allows customers to check in independently, freeing up your front desk staff (note - this is an upgraded feature; please email us if you would like to find out more).

Alternatively, you can manually check someone in using one of the following methods:

- Via the check-in widget on your dashboard
- Scanning their customer card in the people search, people tab or dashboard
- Typing their name in the people search and clicking 'check-in' from their profile
- Going to the relevant session screen and clicking on view details, then selecting 'check-in' for the relevant person
- Via sheets in the sessions section

You can go back to a previous session and check someone in from their people page or the sessions page. If someone has been checked in incorrectly, you can cancel the check-in from the session.

6.2 Taking payment and emailing or printing a receipt

To make payment on an account, you don't need the POS module; there is a 'make payment' button on the people page of each family member and in the billing account.

- Once on a person's profile, click 'make payment'



- Select the invoice/s to be paid
- Click 'proceed'
- Select the payment method
- Update the amount if paying in cash or a part payment
- Click 'make payment'
- The amount and change will be displayed, as well as the email information
- Click 'send payment receipt'
- The payment invoice will be displayed and can be printed from here if required

The payment receipt will be emailed directly to the customer.

The screenshot displays the Mailinator web application interface. The top navigation bar includes a user profile for 'Master Jackson Hill' with options to 'Send emails', 'Edit Profile', 'Remove Person', and 'Login'. Below this, a row of four buttons is shown: 'Regular Booking', 'Voucher Booking', 'Add Purchase', and 'Make Payment' (which is highlighted with an orange border). The main content area is divided into three sections: 'Member Details' (showing date of birth 11/07/2013, card ID HB-00006, and payment method Available), 'Billing Account' (showing a current balance of \$-190.00 and active purchases for 'Learn To Swim, 2MUO Toddler 2'), and 'Customer Contact' (showing contact information for Lydia Hill and Elsa Hill). The 'Make Payment' section is highlighted with an orange border and shows a table of invoices to pay, with two invoices selected. A 'Proceed >' button is also highlighted with an orange border.

Master Jackson Hill

Send emails Edit Profile Remove Person Login

Regular Booking Voucher Booking Add Purchase **Make Payment**

Member Details

Date of birth 11/07/2013 8 years 3 months

Card ID HB-00006 Manage Membership cards

Payment Method Available Manage Payment Methods

Achievements View Achievements

Course Completion View Completion Records

Billing Account 11ptf601 View Billing Account

Current Balance

\$-190.00

Active Purchases

Learn To Swim, 2MUO Toddler 2 📅 Friday 15:00, Training Town

Next charge on: 01/11/2021

Customer Contact Contacted

Last Contact: 1170 days ago

Relationships Add person

Lydia Hill emergency contact responsible person family bill payer 555 1234 lh@mailinator.com

Elsa Hill family 555 1234

Make Payment

Select Invoices to Pay

Invoices: Select All None

Invoices:	Amount	Description	Location	Date
<input checked="" type="checkbox"/> \$95.00	11ptf601-INV162: Learn To Swim (September 2021 / Elsa Hill)	Training Town	01/09/2021	
<input checked="" type="checkbox"/> \$95.00	11ptf601-INV163: Learn To Swim (September 2021 / Jackson Hill)	Training Town	01/09/2021	

Proceed >

[Go back to billing account](#)



Udio

Hayley Yager

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Make Payment

Select Payment Method

Amount: 190.00

Payment Method:

☐ Cash
☒ EFTPOS
☐ Cheque
☐ Payment taken at Head Office
☐ Payment by Gift Voucher
☐ Credit Card Visa ...4242 09/2023

Change: Give change to the customer

Make Payment

[← Change Selected Invoices](#)

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

Help Center

Payment Has Been Saved

29/10/2021 16:04 AWST

Amount: \$190.00

Email Payment receipt

Existing email

Send to these email addresses:

☒ lh@mailinator.com: Elsa Hill, Jackson Hill, Lydia Hill, Norman Hill, Tester Hill

☐ maziewhite@mailinator.com: Elsa Hill, Jackson Hill, Lydia Hill, Norman Hill, Tester Hill

New email

Email address:

Confirm email address:

Associate with bill payer:

Make this the bill payer's primary email address:

Send to a new email address

[Send Payment Receipt](#)
[Open Receipt](#)
[Print Receipt](#)
[← Go back to billing account](#)

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

Help Center

Payment receipt has been sent

Payment receipt

Email receipt Print receipt

Tax invoice 11ptf601-INV163

Date issued 01/09/2021
 Account 11ptf601
 Facility Training Town
 ABN 16 775 868 349

Date	Description	Tax	Amount
01/09/2021	Learn To Swim (September 2021 / Jackson Hill)	n/a	\$95.00
	Total		\$95.00
	Tax		\$0.00

Tax invoice 11ptf601-INV162

Date issued 01/09/2021
 Account 11ptf601
 Facility Training Town
 ABN 16 775 868 349

Date	Description	Tax	Amount
01/09/2021	Learn To Swim (September 2021 / Elsa Hill)	n/a	\$95.00
	Total		\$95.00

29/10/2021 16:04 Staff Member

Payment successful

Sent: lh@mailinator.com



6.3 Overpayment of an invoice

A customer may want to add extra funds to their billing account when they pay an invoice.

- When processing the payment, choose the payment method and update amount
- Under 'change', select from the dropdown box 'credit change to billing account as advance payment'
- Click 'make payment'
- Email the payment receipt containing the extra payment information to customer
- The billing account will go into credit and the payments list report will display the full payment amount

Udio

Make Payment

Select Payment Method

Amount: 100.00

Payment Method:

- ☒ Cash
- ☐ EFTPOS
- ☐ Cheque
- ☐ Payment taken at Head Office
- ☐ Payment by Gift Voucher

Change:

- ☒ Give change to the customer
- ☐ Credit change to Billing Account as advance Payment

Make Payment

[Change Selected Invoices](#)

Udio

Billing Account 1ekvwfjz

Re-Charge

CURRENT BALANCE \$15.00

Make Payment View Invoices Add Credit

Recent activity

[View All Activity](#)

Date & time	Description	Value
26/10/2021 15:38 AWST	Advance Payment Credit	\$15.00
26/10/2021 15:38 AWST	Payment (Cash: Cash)	\$100.00
01/11/2021 00:00 AWST	Babies (November 2021 / Jimmy Yager)	-\$85.00

Payment Settings [Change](#)

Automatic Payments Allowed

Billing Group —

Payment Method Unavailable [Manage](#)

Active since: 26/10/2021

Vouchers

[Add New](#) [View All](#)

No vouchers available.

People [Add person](#)

Jimmy Yager bill payer
Babies_YD60 Babies 1 Monday 07:00
[Training Town](#)

Credits

Training Town: \$15.00 [Apply](#)

Notes [Add New](#)

No notes.


6.4 Resend an email

- Go to the people page of the responsible person
- Click 'view all activity' under member details



- Locate the payment email you wish to resend
- Click 'sent: [email address]'
- Click the 'send again' button on the top right-hand corner of the page

You'll also be able to view details of the email, including email address and date/time it was sent.



Cassi Shoe
 Training Town. Bill Payer.

[Send emails](#)
[Edit Profile](#)
[Remove Person](#)
[Login](#)

Today

Thu 28/10/2021 09:00

[Cancel](#)
[Aqua](#)
[missed](#)
[Check-in](#)

Aqua IKZ5
 Training Town - Aqua - Yellow 1, Yellow 2

[first session at training town, aqua](#)
[last session at training town, aqua](#)

Regular Booking

Voucher Booking

Add Purchase

Make Payment

Member Details

Date of birth	
Card ID	Manage Membership cards
Payment Method	Available Manage Payment Methods
Achievements	View Achievements
Course Completion	View Completion Records
Personal Results	View Results
Activity	View Activity

Contact Details
[Add Detail](#)

555 1234

cassishoe@mailinator.com
[customer accounts login](#) [change password](#)

56 Street St Perth WA 6000

Customer Contact
[Contacted](#)
 Last Contact: 603 days ago

Relationships
[Add person](#)



Gabby Shoe
 family
 555 1234
 cassishoe@mailinator.com
 Babies PK29 Babies 1 🏊 Friday 09:00, Training Town



Heel Shoe
 family
 Learn To Swim, DXU0 Level 2 🏊 Monday 07:00, Training Town



Ina Shoe
 family
 555 1234
 cassishoe@mailinator.com
 Learn To Swim, ORAI Level 1 🏊 Tuesday 15:30, Training Town



Merna Shoe
 family
 555 1234
 cassishoe@mailinator.com
 Babies DW2V Babies 2 🏊 Monday 09:30, Training Town



Ronna Shoe
 family



Events usl4u0g

[← Go back to Cassi Shoe](#)

Events:	Facility:	From:	Until:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Course:	Origins:	Category:	Person:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Cassi Shoe"/>

Filter

Date	Facility	Person	Event	Course	Origin	Actions
26/10/2021 00:07	Training Town	Cassi Shoe	Bookings: Missed 4 Bookings	25/10/2021 12:00	Aqua	Automatic
21/10/2021 19:07	Training Town	Cassi Shoe	Bookings: Missed 3 Bookings	21/10/2021 07:00	Aqua	Automatic
20/10/2021 15:45	Training Town	Cassi Shoe	Financial: Payment successful	\$11.00 Recurring Payments	-	Automatic
20/10/2021 15:45	Training Town	Cassi Shoe	Financial: Invoice Fully Paid	usl4u0g-INV98 -\$11.00	-	Automatic
20/10/2021 12:20	Training Town	Cassi Shoe	Bookings: New Voucher Booking	21/10/2021 07:00	Aqua	Customer
20/10/2021 12:20	Training Town	Cassi Shoe	Bookings: New Regular Booking	Aqua Casual, Training Town	-	Customer

Email

Send Again

Facility: Training Town
Person: [Cassi Shoe](#)
Event: Financial: Payment successful
[\\$11.00 Recurring Payments](#)
Course:
Result: Sent
Email: cassishoe@mailinator.com
Created: 20/10/2021 15:45
Due: 20/10/2021 15:46
Processed: 20/10/2021 15:46
Subject: Payment Receipt

Payment Receipt

This is where you can insert the address...

Hi Cassi Shoe,

Payment Receipt

Tax invoice	usl4u0g-INV98
Date issued	20/10/2021
Account	usl4u0g
Facility	Training Town

6.5 Print a duplicate receipt

- Go to the billing account of the family and click 'view invoices'
- Tick the box for 'include closed' and select 'filter'



- Click on the code for the date required
- Select the date which is highlighted in orange under payment
- Select 'email receipt' or 'print receipt' in the top right-hand corner

Billing Account 1ekvwfjz Re-Charge

CURRENT BALANCE
\$15.00

[Make Payment](#) [View Invoices](#) [Add Credit](#)

Recent activity [View All Activity](#)

Date & time	Description	Value
26/10/2021 15:44 AWST	Advance Payment Credit	\$15.00
26/10/2021 15:44 AWST	Payment (Cash: Cash)	\$100.00
26/10/2021 15:38 AWST	Advance Payment Credit Reversed	\$15.00
26/10/2021 15:38 AWST	Payment (Cash: Cash) Reversed	\$100.00
01/11/2021 00:00 AWST	Babies (November 2021 / Jimmy Yager)	-\$85.00

Payment Settings [Change](#)

Automatic Payments: Allowed

Billing Group: —

Payment Method: Unavailable [Manage](#)

Active since: 26/10/2021

Vouchers

[Add New](#) [View All](#)

No vouchers available.

People [Add person](#)

Jimmy Yager bill payer
Babies_1050 Babies 1 Monday 07:00, Training Town

Credits

Training Town: \$15.00 [Apply](#)

Notes [Add New](#)

No notes.

Billing Account: 1ekvwfjz Invoices [Add New Invoice](#)

[← Back to billing account](#)

Include closed: ☒ Include cancelled: ☐ [Filter](#)

Code	Date Issued	Facility	Charges	Total	Amount Paid	Amount Owing
1ekvwfjz-INV1	26/10/2021	Training Town	Babies (November 2021 / Jimmy Yager)	\$85.00	\$85.00	\$0.00

[Previous](#) [Next](#) Results 1 to 1 of 1 • [Reset filter](#)

Payment receipt

Tax invoice 1ekvwfjz-INV1 [Email receipt](#) [Print receipt](#)

Date issued: 26/10/2021
Account: 1ekvwfjz
Facility: Training Town
ABN 16 775 868 349

Date	Description	Tax	Amount
01/11/2021	Babies (November 2021 / Jimmy Yager)	n/a	\$85.00
	Total		\$85.00
	Tax		\$0.00

Payment

Date & time: 26/10/2021 15:44 AWST
Made by: Jimmy Yager
Taken by: Hayley Yager
Amount: \$100.00
Method: Cash
Includes Credit: Advance Payment Credit \$15.00

26/10/2021 15:44 Staff Member
Payment successful
Sent: hayleyjaneyager@gmail.com



6.6 Cancelling a lesson and issuing make up lesson

If a customer wants to cancel a lesson, a make up lesson will be automatically issued.

- Go to the customer's 'people' page
- Scroll down to upcoming 'bookings'
- Click 'cancel' for the relevant session

*If your business does not have a make up policy, then when you cancel a lesson, there won't be an option to apply a make up.

The screenshot displays the Udio web application interface. On the left is a dark sidebar with navigation icons and labels: Dashboard, People, Sessions, Waiting List, POS, Issues, Reports, and Settings. The main content area is titled 'Billing Account' with a sub-header '1dmbkewu'. It shows a 'Current Balance' of '\$0.00' and a section for 'Active Purchases' with details for 'Learn To Swim, 3Z0I Level 7' on Friday 15:30. Below this is a 'Bookings' section with buttons for 'Add Bookings', 'Move', 'Remove', and 'View all (223)'. Under 'Upcoming Bookings', a specific lesson is listed: 'Fri 24/12/2021 15:30 Level 7 3Z0I' at 'Training Town - Student - Yellow 2'. An orange arrow points from this lesson to a 'Cancel' button, which is highlighted with an orange box. To the right of the main content is a sidebar with sections for 'Health Issues', 'Qualifications', 'Notes', and 'Question answers', each with an 'Add' or 'Answer' button.

6.7 Missed attendance

- If a student doesn't attend their lesson and you haven't been notified, they will appear as having missed the lesson; Udio will not assign them a make up

6.8 Payment in advance

Go to the billing account, then under purchases do the following:

- Click on the 'purchase' of the person who wants to pay in advance



- Select 'process next charge' and 'confirm'
- The purchase amount for the next month will appear as an outstanding balance and in the recent activity
- Repeat this process for any other customers in the family
- The balance will increase accordingly
- Click on 'make payment' and tick the invoices to be paid, then click 'proceed'
- Select the payment method and 'make payment'
- Click 'send payment receipt' to email the receipt to the customer

Billing Group —

Payment Method Unavailable [Manage](#)

Active since: 26/10/2021

Vouchers

[Add New](#) [View All](#)

No vouchers available.

Purchases

[Add New Purchase](#) [Add New Charge](#)

Name	For	Created	Active	Last charge	Next charge
Babies, YQ60 Babies 1 🧸 Monday 07:00, Training Town	Jimmy Yager	26/10/2021	✓	01/12/2021	01/01/2022

Babies, YQ60 Babies 1 🧸 Monday 07:00, Training Town

[Change Day & Time](#) [Process Next Charge](#) [Remove Bookings & Cancel Purchase](#)

[← Go back to billing account](#)

Package: Babies at Training Town
 Price: \$85.00 per month
 Next charge due: 01/01/2022 00:00 AWST
 Start date: 01/11/2021
 Person: [Jimmy Yager](#)

6.9 Printing sheets

You can print off attendance sheets for teachers/staff that require student information for a particular shift. (Note: achievements are displayed on school holiday programs).



- Go to 'sessions' and click 'sheets' in the top right-hand corner
- Click on your facility and date required
- Select the booking type required (this is who will be using the report)
- Filter sessions by:
 - o Courses
 - o Attendance
 - o Achievements
 - o Notes
 - o Medical
- Right click on the page and print or download into an excel or .csv file

The screenshot shows the 'Udio' interface with a sidebar on the left containing 'Dashboard', 'People', 'Sessions' (highlighted), 'Waiting List', 'POS', 'Issues', 'Reports', and 'Settings'. The main area is titled 'Sheets' and contains filters for Facility (Training Town), Date (17/11/2021), Staff Booking Type (Instructor), and Staff Member. Below these are filters for 'For courses' (Toddler 1) and 'Show' (Attendance, Achievements, Course Notes, Session Note). A 'Download' button is highlighted with an orange box, and a right-click context menu is open over it, with the 'Print...' option highlighted in blue. The menu also includes options like 'Save As', 'Cast...', 'Send to DESKTOP-FCNAJ4E', 'Create QR code for this page', 'Translate to English', 'Adobe Acrobat', 'Evernote Web Clipper', 'View Page Source', and 'Inspect'. The background shows a calendar view for the week of 25 Aug to 17 Nov, with a session for 'Wednesday 10:00 Toddler 1' by instructor 'Abigail Sovann' at '52ZR Green 2'.



The screenshot shows a software interface with a sidebar on the left containing navigation options: Apps, Social media, Udio, Dashboard, People, Sessions, Waiting List, POS, Issues, Reports, Settings, and Help Center. The main content area displays a 'Sheets' page with a list of sessions. Each session entry includes the date, time, course name, instructor, and a table for attendance. A 'Print' dialog box is open on the right, showing settings for printing 1 sheet of paper to a RICOH IM C2000 [583] printer. The dialog includes options for Pages (All), Copies (1), Layout (Portrait), and Colour (Colour). An orange arrow points from the 'Print' button in the dialog to the 'Monday 09:00 Toddler 1' session entry in the list.

Information on the page

- Day, time and course, along with teacher name and resource
- Attendance, achievements, course/personal notes and medical information
- Name of the student (plus a '\$' if money is owed), age and course start date

6.10 Non-attendance

For reviewing attendance or non-attendance, go to sheets in the sessions section.

- Filter by date and attendance for all courses will be displayed
- You can view attendance for the previous 12 weeks, as well as see if money is owed which is indicated by a \$ symbol next to their name
- The student's name is clickable should you need to navigate to their page for contact information



17/11/2021

Wednesday 15:00 Toddler 1 🧒

Instructor: Abigail Sovann

K9MZ Yellow 2

			Course Start	25 Aug	01 Sep	08 Sep	15 Sep	22 Sep	29 Sep	06 Oct	13 Oct	20 Oct	27 Oct	03 Nov	10 Nov	17 Nov
Jen Robertson (\$)	6y 2m	Working on kicking	06/01/2021													
John Kennedy (\$)	5y 8m		06/01/2021													

Solo Swim with Floats
15m Swim with Floats

Attended/Achieved
Missed
Cancelled

7. Bookings

7.1 Adding a new family

- Click on the people or dashboard section
- Type in the name of the parent/responsible person and click 'search'
- Click on 'add family'
- Type in the title of the parent, preferred name, full name (must be first and last name) and gender
- Next, type in the children's name(s) one after the other making sure to include a date of birth
- Add a phone number, email and at least their state and postcode in the address section
- Ask survey question if set up (e.g. how did you hear about us?)
- Click 'add family'
- If you've set up automated welcome emails, the family will receive one once they've been added to the system



Udio

People Advanced Search

Search

No people matched your search.

Previous Next 0 Results - [Reset filter](#)

Add "Lulu" Add Family

Udio

Add Family

Family members

Title:	Preferred name:	Full name:	Code:	Gender:	Date of birth:	Family:	Bill Payer:	Responsible Person:	Emergency Contact:
Mrs	Lulu	Lulu Whittaker		Female		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Miss	Summer	Summer Whittaker		Female	28/02/11	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Miss	Ivy	Ivy May Whittaker		Female	05/01/15	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7.2 Booking into a session

From the 'sessions' section:


- Find the session the customer wants to book into
- Click 'add student' then 'bookings for series' in the drop-down, then 'find people'
- Search the name of the student and 'select'
- Check the booking information and start date is correct and click 'proceed'
- Select the package type and 'proceed'
- Double-check all details are correct and click 'confirm new bookings'
- You'll be taken to the 'make payment' screen where you can either process the payment now or return to the billing account
- Repeat for any other family members (remember that all family members should have the same billing account and not individual accounts)



- The customer will receive an automated email confirming the level they have been booked into

Udio

Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings

POWERED BY 

Scheduled sessions

Add New
Cancel Sessions
Sheets
Calendar

Courses:
Code:
Facility: Training Town
Weekday: Any

From date: 28/10/2021
From time:
To time:
With spot: (show any session)

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

Reset Filters
Filter Sessions

Thursday 28th October 2021

30 mins
15:00 to 15:30 (\$)
Add Student 2 Spots
2 of 4 booked: 0 checked in

Level 3 3WO3
Bookings for series
Booking for this session
Add Student to waiting list

Udio

Dashboard
People
Sessions
Waiting List
POS
Issues
Reports

Add New Regular Booking

helena

Helena Morley Select
Next Booking: 04/11/2021 09:00 AWST Level 1/2 at Training Town

Helena Stevenson Select

☒ Helena Zheng Deselect

Previous
Results 1 to 3 of 3
Next

Helena Zheng Deselect



Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

15:30 17FH from 04/11/2021 Student: 2

Friday

14:30 PFFT from 29/10/2021 Student: 1

Saturday

08:00 7IDE from 30/10/2021 Student: 3 Instructor no 4

09:00 3SRX from 30/10/2021 Student: 4 Instructor no 4

10:00 YC92 from 30/10/2021 Student: 4

Sunday

15:30 0QCS from 31/10/2021 Student: 2

Start Date: 04/11/2021

Select Package

Helena Zheng:

☒ Learn To Swim: \$95.00 per month

Customer Notification:

Notify Customer

Customer will be notified only if appropriate events are setup.

Show Special

Proceed >

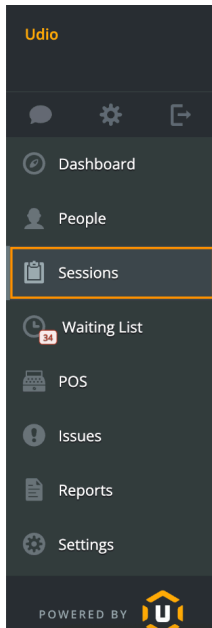
7.3 Booking a make up

Make up lessons can be booked into a temporary or permanent session with availability. Temporary places are indicated by red text with the number of places available when looking at the sessions page.

- Click 'sessions' and search for the session the customer wants to be booked into
- Click 'add student' then 'booking for this session' in the drop-down, then 'find people'
- Search the name of the student and 'select'
- Check the booking information and click 'confirm'
- Select the appropriate voucher or package, such as 'use make up' or 'casual'
- Click 'confirm selection & create booking'
- The student's name will appear in the session with a green 'make up' label

If there is no make up voucher on the account, you can select a casual package (if you've set this up for your school).





Scheduled sessions

[Add New](#) [Cancel Sessions](#) [Sheets](#) [Calendar](#)

Courses: Code: Facility: Weekday:

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

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

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

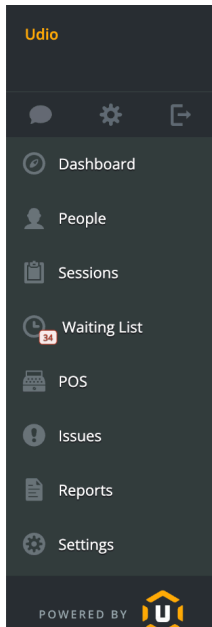
Thursday 4th November 2021

30 mins 10:00 to 10:30 (\$)

Level 3 Q4QJ
Training Town: Green 3

[Add Student](#) 1 Spot 3 of 4 booked
Bookings for series
Booking for this session
[Add Student to waiting list](#)

[View Details](#)



Add bookings (per session)

This form adds voucher-based or temporary bookings. [Add regular bookings instead](#)

joanna

☒ Joanna Lee [Deselect](#)

Joanna Rusling [Select](#)

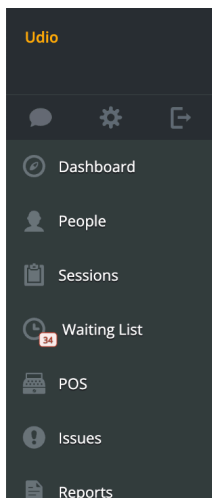
Joanna Santoro [Select](#)

[Previous](#) Results 1 to 3 of 3 [Next](#)

Joanna Lee [Deselect](#)

Student

Customer will be notified only if appropriate events are setup.



Add bookings (per session)

This form adds voucher-based or temporary bookings. [Add regular bookings instead](#)

Choose voucher or package for this booking

Joanna Lee:

☒ Use Make Up

☐ LTS Week: \$0.00 total

☐ Trial LTS Lesson: \$0.00 total

☐ Frequent Swimmer: \$10.00 total

☐ Telethon: \$15.00 total

☐ SWIMVAC OP Testing Only: \$16.00 total

☐ Learn To Swim Casual: \$23.50 total

☐ LTS 10 Session pass: \$80.00 total

[Confirm Selection & Create Booking »](#)



The screenshot shows the Udio interface for booking a session. On the left is a dark sidebar with navigation icons and labels: Dashboard, People, Sessions, Waiting List, POS, Issues, Reports, and Settings. The main content area is titled 'Level 3' and shows a status 'Made 1 booking'. Below this, there's a section for 'Student' with a list of names: Freddy Woodruff, Joanna Lee, South East, and Vera Hedlund. Joanna Lee is highlighted with an orange arrow pointing to a 'Make Up' button. The right sidebar shows session details for Thursday 4th November 2021, 10:00 to 10:30, 30 mins. It also lists resources, series code Q4QJ, and previous/next session information.

7.4 Booking an assessment


You can make assessment bookings using the same process as booking a lesson. Ensure the customer information is entered into Udio prior to booking an assessment.

- Go to 'sessions,' filter by 'assessment' and find the session required
- Click 'add assessment' then 'booking for this session' in the drop-down, then 'find people'
- Search the name of the student and 'select' then click 'confirm'
- The person will appear in the session and can be checked in upon arrival



Udio

- Dashboard
- People
- Sessions
- Waiting List
- POS
- Issues
- Reports
- Settings

POWERED BY 

Scheduled sessions

[Add New](#) [Cancel Sessions](#) [Sheets](#) [Calendar](#)

Courses: Code: Facility: Weekday:

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

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

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

Thursday 28th October 2021

10 mins 17:30 to 17:40 [Add Assessment 2 Spots](#) 0 of 2 booked

Assessment LHYA
Training Town: Green 1

[View Details](#)

Udio

- Dashboard
- People
- Sessions
- Waiting List
- POS
- Issues
- Reports
- Settings

Add bookings (per session)

This form adds voucher-based or temporary bookings. [Add regular bookings instead](#)

[Select](#)

☒ [Deselect](#)

[Select](#)

[Select](#)

[Previous](#) Results 1 to 4 of 4 [Next](#)

[Deselect](#)

Udio

- Dashboard
- People
- Sessions
- Waiting List
- POS
- Issues
- Reports
- Settings

Made 1 booking

Assessment

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

Assessment

[Add Assessment 1 Spot](#) 1 of 2 booked: 0 checked in



Carmen Leong 15 years

[Check-in](#)

[Cancel](#)

[...](#)

Supervisor

[Add Supervisor 1 Spot](#)

Session created at 02/08/2021 20:35 AWST by State Swim system user.
Last updated at 28/10/2021 16:15 AWST by State Swim system user.

Thursday 28th October 2021
17:30 to 17:40 [10 mins](#)

Resources

Green 1 at Training Town
[used exclusively](#)

Series code

LHYA
[Weekly](#)

Previous session in series

[21/10/2021 17:30](#)
Assessment at Training Town
Green 1

Next session in series

[04/11/2021 17:30](#)
Assessment at Training Town
Green 1



7.5 Booking a casual Lesson

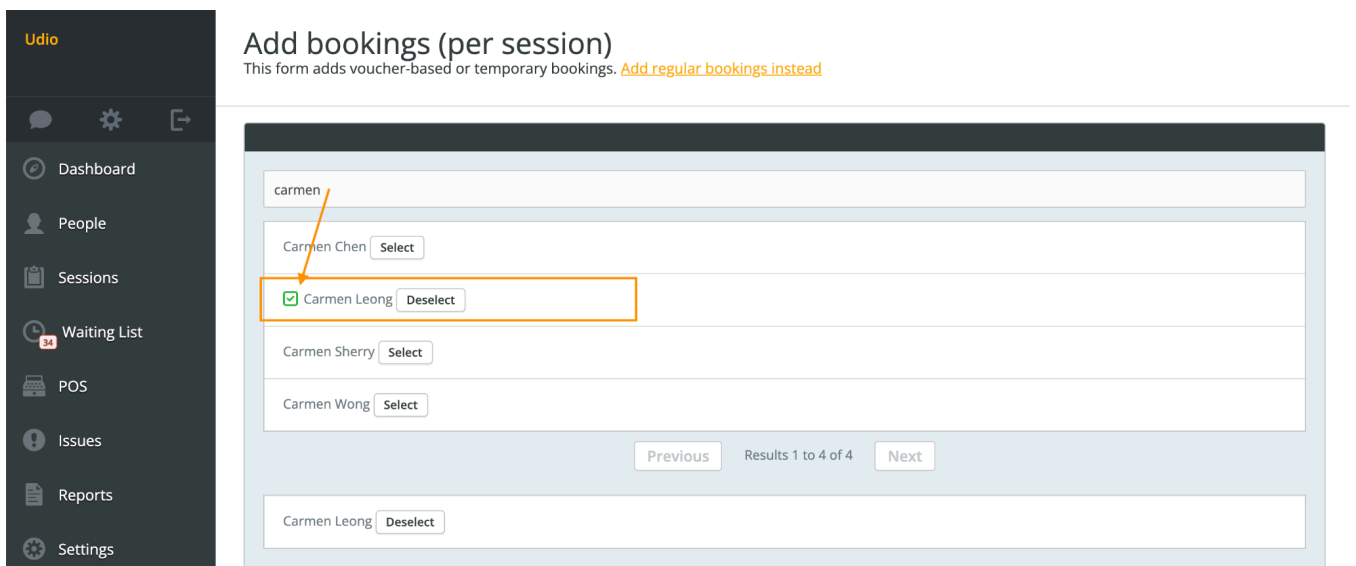
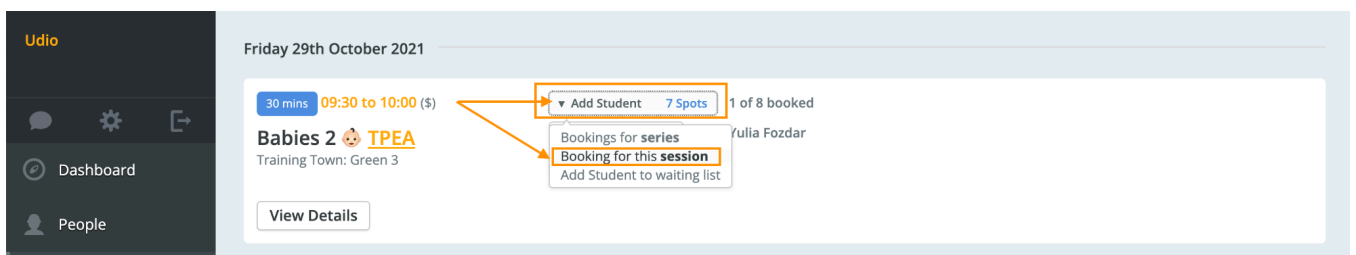
If the person is not yet a customer, you will need to enter their details into Udio.

- Go to 'sessions and pick a session that suits the customer
- Click 'add student' then 'booking for this session' in the drop down, then 'find people'
- Search the student's name and select the correct person
- Check the booking details and click 'confirm'
- Select your casual package then 'confirm selection & create booking'
- You can either take payment or click on 'billing account' to process



7.6 Booking a complimentary/free trial lesson

- Go to 'sessions and pick a session that suits the customer
- Click 'add student' then 'booking for this session' in the drop down, then 'find people'
- Search the student's name and select the correct person
- Check the booking information and click 'confirm'
- Click 'complimentary lesson' then 'confirm selection and create booking'



Udio

Add bookings (per session)
This form adds voucher-based or temporary bookings. [Add regular bookings instead](#)

Choose voucher or package for this booking

Carmen Leong:

- ☒ Complimentary Lesson: \$0.00 total (special)
- ☐ LTS Week: \$0.00 total
- ☐ Frequent Swimmer: \$10.00 total
- ☐ Telethon: \$15.00 total
- ☐ SWIMVAC OP Testing Only: \$16.00 total
- ☐ Waterbabies Casual: \$21.00 total

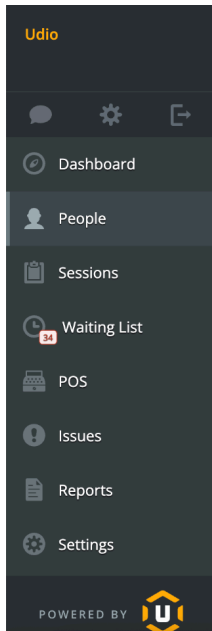
[Confirm Selection & Create Booking »](#)

Under 'sessions' and on the 'people' page, the booking will come up as complimentary so the front desk staff, supervisor and teacher know that this is a complimentary lesson. The booking will also appear as the first session at the school and level.

7.7 Booking multiple complimentary/free trial lessons

- Go to the 'people' page and search customer
- Click 'add bookings' then 'add voucher or temporary bookings' and 'find sessions'
- Search on either the course or enter the series code
- Select the number of sessions to match the number of complimentary/free trial lessons – DO NOT select series
- Click 'confirm'
- Click 'complimentary lesson' then 'confirm selection and create booking'





Billing Account 1ekvwfjz [View Billing Account](#)

Current Balance
\$0.00

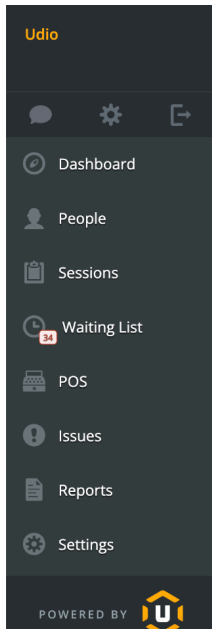
Active Purchases
Babies, YQ60 Babies 1 🏆 Monday 07:00, Training Town
Next charge on: 01/02/2022

Vouchers [Add](#) [View All](#)
1 x Complimentary

Bookings
[Add Bookings](#) [Move](#) [Remove](#) [View all](#) 12

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

Upcoming Bookings
[Mon 01/11/2021 07:00](#)
Babies 1 🏆 YQ60
Training Town - Student - Green 1
[first session at training town, babies 1 🏆](#)

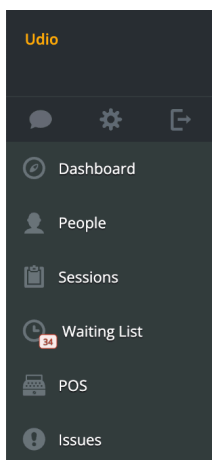


Course Any **Code** pk29 **Facility** Training Town **Weekday** Any

From date 29/10/2021 **To date** **From time** **To time**

Babies 1 🏆 PK29 Friday 29th October 2021 09:00	Select series	2 Student	1 Instructor	1 Supervisor	Select
Babies 1 🏆 PK29 Friday 5th November 2021 09:00	Select series	2 Student	1 Instructor	1 Supervisor	Select
Babies 1 🏆 PK29 Friday 12th November 2021 09:00	Select series	2 Student	1 Instructor	1 Supervisor	Select
Babies 1 🏆 PK29 Friday 19th November 2021 09:00	Select series	2 Student	1 Instructor	1 Supervisor	Select
Babies 1 🏆 PK29 Friday 26th November 2021 09:00	Select series	2 Student	1 Instructor	1 Supervisor	Select

[Previous](#) Results 1 to 5 of 13 [Next](#)



Add bookings (per session)

This form adds voucher-based or temporary bookings. [Add regular bookings instead](#)

Choose voucher or package for this booking

Jimmy Yager:
☒ Complimentary Lesson x3: \$0.00 total (\$0.00 x3) (special)
☐ LTS Week x3: \$0.00 total (\$0.00 x3)
☐ Frequent Swimmer x3: \$30.00 total (\$10.00 x3)
☐ Telethon x3: \$45.00 total (\$15.00 x3)
☐ SWIMVAC OP Testing Only x3: \$48.00 total (\$16.00 x3)
☐ Waterbabies Casual x3: \$63.00 total (\$21.00 x3)

[Confirm Selection & Create Bookings »](#)



7.8 Re-enrolling a term-based customer

When a customer is booked into a term-based program, they can 're-enroll' or 'not re-enroll' the child before the end of the current term.

- Go to 'people' and search on the name of the student
- Click on the repeat arrow next to the cancel button
- Select 'will be re-enrolled into the next term' or 'do not re-enroll'

Note: Udio defaults to re-enrol

The screenshot displays the Udio web application interface for a session titled "Term-based Level 1". The session is scheduled for Tuesday 2nd November 2021, from 09:00 to 09:30 (30 mins). The student is Viktor Penna, 4 years 10 months old, with a red status bar indicating "first session at term based, term-based level 1". The interface shows options to "Cancel", "Re-enroll", or "Do not re-enroll". An orange arrow points to the "Re-enroll" button. The right sidebar shows session details, including the series code "A93X" and the next session date "09/11/2021 09:00".

7.9 Adding a person to an existing family


When a person needs to be added to an existing family:


- Go to the 'people' page of one of the family members
- Click on 'add person' under relationships on the right-hand side
- Add the information such as name, gender, date of birth, facility and question
- Click 'confirm'



Udio

Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings

POWERED BY 



Gwen Foster

Send emails
Send SMSs
Edit Profile
Remove Person
Login

Regular Booking

Voucher Booking

Add Purchase

Make Payment

Member Details


Date of birth01/05/20165 years 5 months
Card ID
Manage Membership cards
Payment MethodUnavailable
Manage Payment Methods
Achievements
View Achievements
Course Completion
View Completion Records
Personal Results
View Results
Activity
View Activity

Contact Details
Add Detail

0404 414 646
gregfoster@mailinator.com
customer accounts login change password

Customer Contact
Contacted
Last Contact: 1170 days ago

Relationships
Add person



Greg Foster
emergency contact
responsible person
family
bill payer
0404 414 646
gregfoster@mailinator.com

Health Issues
Add Issue
No health issues.

Qualifications
Add
No qualifications recorded.

Notes
Add Note
No notes.

People

Add Person to Billing Account e9vh6zx

Existing people: [Greg Foster](#), [Gwen Foster](#)

Title:

Mrs

Preferred name:

Irene

Full name:

Foster

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

Gender:

Female

Date of birth:

28/05/1981

Billing Group:

Family:

☒

Bill Payer:

☐

Responsible Person:

☒

Emergency Contact:

☒

Facility:

Training Town

How did you hear about us?

Google

Image:

Choose file No file chosen

Confirm

[Go back](#)



7.10 Purchasing session vouchers

Whilst a voucher-based session is not booked into a session, the customer must purchase a session pass to attend.

- If they are a new customer, you'll need to enter their details into Udio
- Locate the session to be booked into
- Click on 'add lap swimmer' or 'add aqua' then select 'booking for this session'
- Click 'find people' then type in the customer's name and 'select'
- Confirm the booking information
- Select the voucher/package, then 'confirm selection & create booking'
- Take payment via the 'make payment' screen

Scheduled sessions

▼ Add New Cancel Sessions Sheets Calendar

Courses: Code: Facility: Training Town Weekday: Any

From date: 29/10/2021 From time: To time: With spot: Lap Swimmer

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

Reset Filters Filter Sessions

Saturday 30th October 2021

60 mins 07:00 to 08:00

Lap Swimming TIMR

Training Town: Yellow 1

▼ Add Lap Swimmer 10 Spots 0 of 10 booked

Bookings for series
Booking for this session

View Details



Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

POWERED BY

Add bookings (per session)

This form adds voucher-based or temporary bookings. [Add regular bookings instead](#)

lilya

☒ Lilya Katwishi-Ngandwe

Deselect

Previous

Results 1 to 1 of 1

Next

Lilya Katwishi-Ngandwe

Deselect

Lap Swimmer

Do not notify Customer

Customer will be notified only if appropriate events are setup.

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Add bookings (per session)

This form adds voucher-based or temporary bookings. [Add regular bookings instead](#)

Choose voucher or package for this booking

Lilya Katwishi-Ngandwe:

☒ Lap Swimming Casual: \$15.00 total

☐ Lap Swimming 10 Sessions Seniors: \$58.80 total

☐ Lap Swimming 10 Sessions: \$73.50 total

☐ Lap Swimming 20 Sessions Seniors: \$105.00 total

☐ Lap Swimming 20 Sessions: \$131.25 total

Confirm Selection & Create Booking »

Udio

Dashboard

People

Sessions

Waiting List

Made 1 purchase

Made 1 booking

Make Payment

Select Invoices to Pay

Invoices:

☒ \$15.00 1gvkrs02-INV3: Lap Swimming Casual (Lilya Katwishi-Ngandwe) Training Town 29/10/2021

Proceed »

[← Go back to billing account](#)



Udio

Make Payment

Select Payment Method

Amount: 15.00

Payment Method:

- ☐ Cash
- ☒ EFTPOS
- ☐ Cheque
- ☐ Payment taken at Head Office
- ☐ Payment by Gift Voucher

Change: Give change to the customer

Make Payment

[← Change Selected Invoices](#)

7.11 Moving a booking time and day (same course)

- Go to the 'people' page of the person you are moving
- Under 'bookings' click on 'move' and select course
- If the same course, leave and click 'proceed'
- Tick the new day
- Choose the 'from date' and click 'proceed'
- Click '(use current package:)', review the booking and 'confirm purchase & bookings change'

The customer will receive an automated confirmation email with the new booking information.



Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

Billing Account 1ekwvfjz

View Billing Account

Current Balance

\$0.00

Active Purchases

Babies, YQ60 Babies 1 🧸 Monday 07:00, Training Town

Next charge on: 01/02/2022

Jimmy Yager has no vouchers

Add

Bookings

Add Bookings

Move

Remove

View all 13

Babies, YQ60 Babies 1 🧸 Monday 07:00, Training Town

Upcoming Bookings

Mon 01/11/2021 07:00

Babies 1 🧸 YQ60

Training Town - Student - Green 1

first session at training town, babies 1 🧸

Udio

Dashboard

People

Sessions

Change purchase & bookings

Babies, YQ60 Babies 1 🧸 Monday 07:00, Training Town [Jimmy Yager](#)

Select new Day & Time

New Course:

Babies 1 🧸

Proceed

Go back

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

Change purchase & bookings

Babies, YQ60 Babies 1 🧸 Monday 07:00, Training Town [Jimmy Yager](#)

Select new Day & Time

New Course:

Babies 1 🧸

Day and Time:

Monday

☐ 07:00 YQ60 from 01/11/2021 Student: 3

☐ 09:00 5GX1 from 01/11/2021 Student: 5

☐ 09:00 XDI9 from 01/11/2021 Student: 6

☐ 10:00 SATY from 01/11/2021 Student: 5

☐ 10:00 FSJQ from 01/11/2021 Student: 6

☐ 10:00 VIQ from 01/11/2021 Student: 2 Fred Franks

☐ 18:00 YXWN from 01/11/2021 Student: 2

Tuesday

☒ 07:15 5NYE from 02/11/2021 Student: 3

☐ 09:00 Y6NV from 02/11/2021 Student: 3

☐ 09:00 QEI7 from 02/11/2021 Student: 5 Alison Auld

59

7.12 Moving a booking to another course

- Go to the 'people' page of the person you are moving
- Under 'bookings' click on 'move' and select course
- Select the new course and 'proceed'
- Select the day and time and 'proceed'
- Choose the 'from date' and 'proceed'
- Click '(use current package:)' if moving to a new package and 'proceed'
- Review the booking and 'confirm purchase & bookings change'

The customer will receive an automated confirmation email with the new booking information as well as the recorded course completion.



Udio

Change purchase & bookings

Babies, YQ60 Babies 1 🇺🇸 Monday 07:00, Training Town [Jimmy Yager](#)

Select new Day & Time

New Course:

- ✓ 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 🇺🇸

Sessions

Waiting List 34

POS

Issues

Reports

Settings

Friday

☒ 09:30 **TPEA** from 05/11/2021 Student: 7 Yulia Fozdar

☐ 10:00 **CGD6** from 05/11/2021 Student: 7

Saturday

☐ 10:00 **5WCE** from 30/10/2021 Student: 7

Sunday

☐ 09:30 **8JGF** from 31/10/2021 Student: 8 Yulia Fozdar

☐ 10:00 **61JO** from 31/10/2021 Student: 6 Yulia Fozdar

[Proceed](#) [Go back](#)

Dashboard

People

Sessions

Waiting List 34

POS

Issues

Reports

Settings

Sunday

☐ 09:30 **8JGF** from 31/10/2021 Student: 8 Yulia Fozdar

☐ 10:00 **61JO** from 31/10/2021 Student: 6 Yulia Fozdar

From Date: 05/11/2021

Package:

☒ (use current package: Babies)

☐ Babies: \$85.00 per month

☐ Babies Weekend Rate: \$100.00 per month (special)

Customer Notification:

Customer will be notified only if appropriate events are setup.

Course Completion:

[Confirm Purchase & Bookings Change](#) [Go back](#)

7.13 Moving a voucher-based booking such as school holiday program

- Go to the 'people' page of the person you are moving



- Under 'bookings' click 'move' and 'move voucher booking'
- Find booking and select 'series'
- Click 'find session' to find the session you want to move to and 'select series'
- Click Confirm

Activity View Activity

Bookings

▼ Add Bookings ▼ Move ▼ Remove View all 271

Learn To Swim, G9BQ Transition Thursday 15:30, Training Town
Move Voucher Bookings

Upcoming Bookings

Mon 01/11/2021 09:00
SH - Transition Q84D
Training Town - Student - Green 4
first session in sh - transition School Holiday Programme Check-in

Tue 02/11/2021 09:00
SH - Transition Q84D
Training Town - Student - Green 4 School Holiday Programme

Wed 03/11/2021 09:00
SH - Transition Q84D
Training Town - Student - Green 4 School Holiday Programme

Thu 04/11/2021 09:00
SH - Transition Q84D
Training Town - Student - Green 4 School Holiday Programme

Thu 04/11/2021 15:30
Transition G9BQ
Training Town - Student - Green 1

No health issues.

Qualifications
No qualifications recorded.

Notes
No notes.

Question answers
No answers recorded.

Facility Code Course Weekday

Training Town Any Any

From date To date From time To time

01/11/2021

Student in SH - Transition Q84D Monday 1st November 2021 09:00	Select series	Select	School Holiday Programme
Student in SH - Transition Q84D Tuesday 2nd November 2021 09:00	Select series	Select	School Holiday Programme
Student in SH - Transition Q84D Wednesday 3rd November 2021 09:00	Select series	Select	School Holiday Programme
Student in SH - Transition Q84D Thursday 4th November 2021 09:00	Select series	Select	School Holiday Programme
Student in SH - Transition Q84D Friday 5th November 2021 09:00	Select series	Select	School Holiday Programme

Previous Results 1 to 5 of 5 Next



The top screenshot shows the 'Udio' dashboard on the left with a sidebar menu containing: Dashboard, People, Sessions, Waiting List, POS, Issues, Reports, Settings, and Help Center. The main content area displays a search filter for 'SH - Transition' and a list of bookings. An orange box highlights the 'SH - Transition Q84D' booking on Monday 1st November 2021 at 09:00. An arrow points to the 'Select series' button for this booking. The bottom screenshot shows the profile page for 'Boo Bam'. A notification at the top says 'Removed 5, added 5 bookings.' The profile includes buttons for 'Send emails', 'Edit Profile', 'Remove Person', and 'Login'. A 'Today' section highlights the 'SH - Transition Q84D' booking for Monday 01/11/2021 at 09:00, with buttons for 'Cancel', 'School Holiday Programme', and 'Check-in'. The right sidebar shows 'Contact Details' (phone, email, address), 'Customer Contact' (last contact date), and 'Relationships' (Fred Bam, Barney Bam).

7.14 Removing a booking

- Go to the 'people' page of the person whose booking you want to remove
- Under 'bookings' click 'remove' and select course
- Select the 'cancel date' and ask customer the survey question
- Click 'cancel purchase & remove bookings'

You will see the remaining sessions the person is booked into.



Udio

Dashboard | People | Sessions | Waiting List | POS | Issues | Reports | Settings

Active Purchases

Learn To Swim, JZWR Toddler 1 🧒 Monday 08:30, Training Town
Next charge on: 01/11/2021

Ted Burket has no vouchers [Add](#)

Bookings

▼ Add Bookings ▼ Move ▼ **Remove** [View all](#) 176

Learn To Swim, JZWR Toddler 1 🧒 Monday 08:30, Training Town

Upcoming Bookings

Mon 01/11/2021 08:30
Toddler 1 🧒 JZWR
Training Town - Student - Yellow 3
Instructor: Abigail Sovann

Mon 08/11/2021 08:30
Toddler 1 🧒 JZWR
Training Town - Student - Yellow 3
Instructor: Abigail Sovann

Mon 15/11/2021 08:30

No answers recorded.

Udio

Dashboard | People | Sessions | Waiting List

Learn To Swim, JZWR Toddler 1 🧒 Monday 08:30, Training Town

Are you sure you wish to cancel this purchase?

Cancel Date: Monday 20th December 2021
All bookings on and after this date will be removed.

Why are you leaving?
Holiday

Cancel Purchase & Remove Bookings [← Go back](#)

7.15 Sending an email manually

In Udio, you can automatically send emails to all new customers and when bookings are moved. You can also send these emails out manually.

- Find customer via the 'people' page and click 'send emails' at the top of the page
- Select the email you wish to send and select 'confirm'

Udio

Dashboard | People

Abbey Tornatora
Training Town, Bill Payer.

▼ **Send emails** [Edit Profile](#) [Remove Person](#) ▼ Login

Regular Booking | Voucher Booking | Add Purchase | Make Payment

Contact Details [▼ Add Detail](#)
lisapee72@hotmail.com

Customer Contact [Contacted](#)
Last Contact: 1170 days ago

Relationships [Add person](#)
Sofia Tornatora



Send Email to Abbey Tornatora

Send "Congratulations on your Achievement" email to Abbey Tornatora

Email Address:

Category:

Customer is able to opt-out from all categories, except 'Important'.

Opt-Out:

[Go back](#)

7.16 Sending link to customer portal

- Find customer via the 'people' page and click 'send emails' at the top of the page
- Select 'customer accounts signup information'
- Confirm email address and click 'confirm'

Abbey Tornatora
Training Town. Bill Payer.

Contact Details
lisapee72@hotmail.com

Customer Contact
Last Contact: 1170 days ago

Relationships
Sofia Tornatora

Send Email to Abbey Tornatora

Send "Customer Accounts Signup Information" email to Abbey Tornatora

Email Address:

Category:

Customer is able to opt-out from all categories, except 'Important'.

Opt-Out:

[Go back](#)

8. Waiting List

If a customer requests a time or day and a spot is not currently available, you can add them to the waiting list in Udio.



8.1 Adding a customer

- In 'sessions', where it usually says 'add student', click 'add student to waiting list' - you'll only see this button if the session is full
- Click 'find person,' select the person to go on the waiting list and 'select purchase'
- If the customer is new, click on 'create new purchase' and 'confirm'
- If the customer is existing, select the existing purchase type and 'confirm'
- The request has now been added to the waiting list
- The 'invite' button will be greyed out and say 'no spots' until one becomes available

The screenshot shows the Udio interface with a sidebar on the left containing navigation links: Dashboard, People, Sessions (highlighted), Waiting List, POS, Issues, Reports, and Settings. The main content area displays a filter bar at the top with a date selector (29/10/2021), a staff member dropdown, a staff booking type dropdown (set to 'Instructor'), and checkboxes for 'Only active sessions' and 'Only upcoming sessions'. Below the filter bar are 'Reset Filters' and 'Filter Sessions' buttons. The sessions list for Friday 29th October 2021 includes two sessions: 'Level 7' (30 mins, 15:30 to 16:00, 3 of 6 booked) and 'Squad Beginner' (60 mins, 15:30 to 16:30, 10 of 10 booked). The 'Squad Beginner' session has a highlighted 'Add Student to waiting list' button, which is pointed to by an orange arrow. Other buttons for 'Add Student', 'Add Instructor', and 'Add Supervisor' are also visible for the 'Level 7' session.

The screenshot shows the Udio 'Waiting List' page. The sidebar on the left is identical to the previous screenshot, with 'Waiting List' highlighted. The main content area has a title 'Waiting List' and a sub-header 'Add person to waiting list'. Below this is a form with a search bar containing 'Jude Bryant' and a 'Deselect' button. The form includes several fields: 'Course' (set to 'Squad Beginner'), 'Preferred weekdays' (set to 'Friday'), 'Session start from' (set to '15:30'), 'Session start until' (set to '15:30'), 'Earliest start date' (set to '29/10/2021'), 'Booking type' (set to 'Student'), and 'Facility' (set to 'Training Town'). At the bottom of the form is a highlighted 'Select Purchase' button, pointed to by an orange arrow. A 'Go back to session' link is visible at the bottom right of the form.



Udio

Dashboard

People

Sessions

Jude Bryant waiting for New Squad Beginner 🏆 15:30-15:30 Friday

Select purchase to update and move bookings or create a new purchase

Purchase:

Create new purchase

Confirm

← Go back to waiting list

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Waiting List Places

Add person

Invitations

Courses:

Squad Beginner 🏆 x

Session start from:

Session start until:

Available from:

Weekday:

Any

With available spots: ☐

Filter

Created	Facility	Person	Course	Weekdays	Start Time	End Time	Available From	Status	Booking Type	Actions
19/03/2021 14:03	Training Town	Liam Green	move Squad Beginner 🏆	Friday	15:30	15:30	19/03/2021	Waiting	Student	No spots Delete
29/10/2021 12:19	Training Town	Jude Bryant new	Squad Beginner 🏆	Friday	15:30	15:30	29/10/2021	Waiting	Student	No spots Delete

8.2 Inviting a customer

- On the 'waiting list' section, tick 'with available spots' and click 'filter'
- Under 'actions' click 'invite to [series code]'
- Select the 'package', check all details are correct and click 'invite'
- The sessions screen will show that an invite has been sent and the spot is no longer available
- The customer will receive an email with the invitation and details of the spot requested
- The customer needs to click on the link to accept or decline the invitation which is valid for 24 hours only
- If the customer selects 'wait for another spot,' the spot is declined and will be made available to someone else
- If the customer clicks 'accept and book, they will be directed to a confirmation page and will receive a booking confirmation email with the new booking information
- The booking will be moved automatically



Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Waiting List Places

Add person

Invitations

Courses:

Session start from:

Session start until:

Available from:

Weekday:

Any

With available spots: ☒

Filter

Created	Facility	Person	Course	Weekdays	Start Time	End Time	Available From	Status	Booking Type	Actions
19/06/2018 13:26	Training Town	Del Hirsh	Transition	Tuesday	14:00	14:00	19/06/2018	Last invitation expired on 31/05/2019 12:26	Student	Invite to JUHD Delete
23/11/2018 11:03	Training Town	Errol Cardenas	Transition	Friday	13:00	13:00	23/11/2018	Last invitation expired on 03/09/2021 11:17	Student	Invite to TQFC Delete

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Reports

Settings

Help Center

Invite Del Hirsh to Transition

Select Package for invitation

Package:

Learn To Swim

Invitation Details

Student:

Del Hirsh

Course:

Transition

Facility:

Training Town

Series Code:

JUHD

Sessions

21/12/2021 14:00 AWST Transition at Training Town

28/12/2021 14:00 AWST Transition at Training Town

04/01/2022 14:00 AWST Transition at Training Town

11/01/2022 14:00 AWST Transition at Training Town

18/01/2022 14:00 AWST Transition at Training Town

Previous invitations for Del Hirsh

Course	Facility	Series	Package	Status
Transition	Training Town	JUHD	Learn To Swim	expired

Invite

Go back

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Waiting List Places

Add person

Invitations

Courses:

Session start from:

Session start until:

Available from:

Weekday:

Any

With available spots: ☒

Filter

Created	Facility	Person	Course	Weekdays	Start Time	End Time	Available From	Status	Booking Type	Actions
19/06/2018 13:26	Training Town	Del Hirsh	Transition	Tuesday	14:00	14:00	19/06/2018	Last invitation invited on 29/10/2021 12:33	Student	Already invited Delete



9. Personal best results and awards

PB milestones are listed under personal results awards. To view this:

- Go to 'reports' then 'people' then 'results awards'
- Update the date filters and facility
- Click 'filter'

The report will show person's name, facility, date of PB and award; it can then be printed or downloaded if required.

The screenshot shows the Udio Reports interface. On the left is a dark sidebar with navigation options: Dashboard, People, Sessions, Waiting List, POS, Issues, Reports (highlighted with an orange box), and Settings. The main content area is titled 'Reports' and contains three sections: 'People' (with links to Birthdays, Course Completions, Achievements, Personal Results, Results Awards (highlighted with an orange box), Staff Roster Report, All Activity, and Postcode Heatmap), 'Billing' (with links to Fees Report, Billing Accounts List, Credits list, Outstanding Credit, and Reversals list), and 'Vouchers' (with links to Vouchers List and Vouchers Summary). Two orange arrows point from the 'Results Awards' link to the 'Personal Results Awards' section below.

The 'Personal Results Awards' section features filters for 'From date' (01/11/2017), 'To date' (01/11/2021), and 'Facility' (Training Town). A 'Filter' button is highlighted with an orange box. Below the filters is a table with the following data:

Person	Facility	Date	Award
Ina Shoe	Training Town	26/03/2021	Well Done
Isabell Mcleod	Training Town	06/10/2021	Well Done
Raquel McGovern	Training Town	18/05/2018	Bronze Medal

At the bottom of the table, there are navigation buttons: 'Previous', 'Next', 'Results 1 to 3 of 3 - Reset filter', a dropdown menu set to 'Excel file', and a 'Download' button.



9.1 Viewing personal results

There are two ways to view personal results.

- To view individual people, go to their 'people' page and click on 'view results' under membership details next to 'personal results'

Udio

Ina Shoe

Send emails Edit Profile Remove Person Login

Regular Booking Voucher Booking Add Purchase Make Payment

Member Details

Date of birth 09/04/2016 5 years 6 months

Card ID Manage Membership cards

Payment Method Available Manage Payment Methods

Achievements View Achievements

Course Completion View Completion Records

Personal Results 5 PBs View Results

Activity View Activity

Billing Account us14u0g View Billing Account

Current Balance \$0.00

Active Purchases

Learn To Swim, OBAL Level 1 Tuesday 15:30, Training Town

Next charge on: 01/11/2021

Vouchers 8 X Aqua-10 Sessions Add View All

Contact Details Add Detail

555 1234

cassishoe@mailinator.com customer accounts login change password

56 Street St Perth WA 6000

Customer Contact Contacted

Last Contact: 529 days ago

Relationships Add person

Cassi Shoe emergency contact responsible person family bill payer 555 1234 cassishoe@mailinator.com

Gabby Shoe family 555 1234 cassishoe@mailinator.com Babies, PK29 Babies 1 Friday 09:00, Training Town

Heel Shoe family Learn To Swim, IXU0 Level 2 Monday

Udio

Results for Ina Shoe (5y)

Has 5 PBs. Achieved Well Done on 26/03/2021.

Go back Add New Result

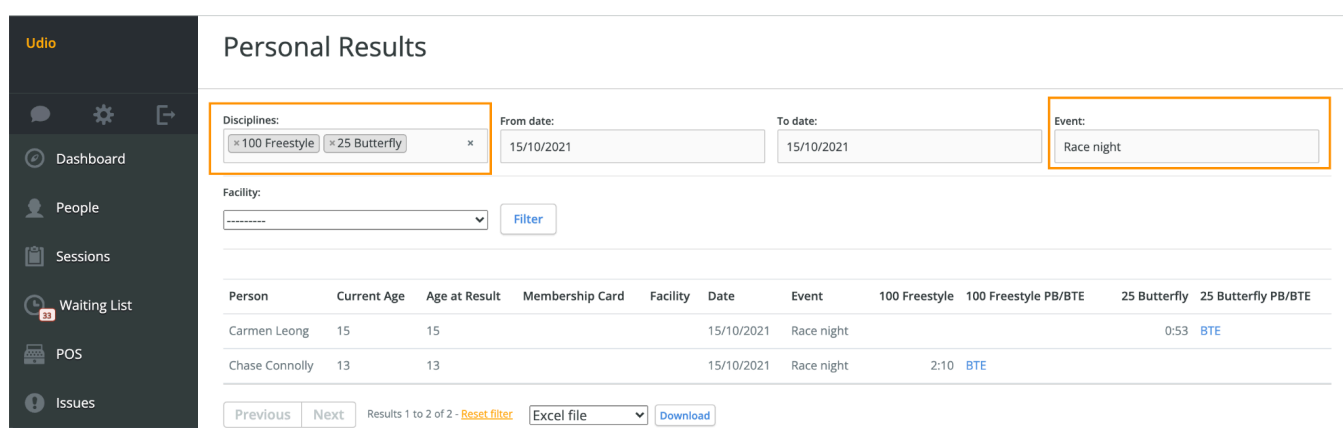
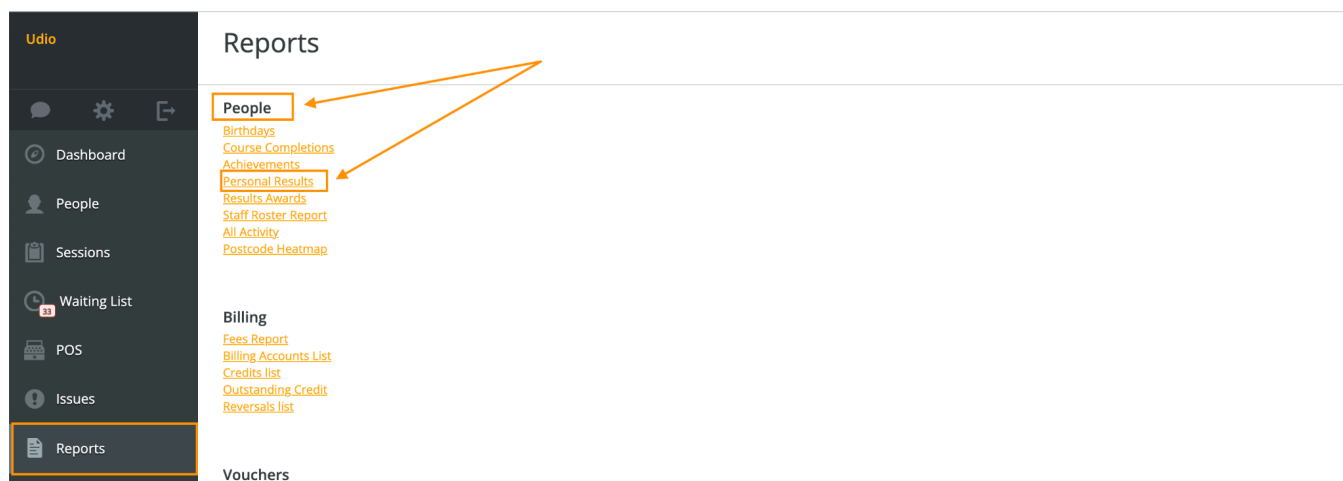
Discipline: Filter

Discipline	Date	Age at Result	Time	Edit	Delete
50 Backstroke	12/04/2021	5	01:25.30	Edit	Delete
100 Freestyle	26/03/2021	4	01:25.36 PB BTE	Edit	Delete
50 Backstroke	22/03/2021	4	00:35.28 PB BTE	Edit	Delete
40 Backstroke	10/11/2020 Squad Night	4	01:12.30 PB BTE	Edit	Delete
50 Backstroke	28/10/2020 Race Night	4	01:25.30 PB	Edit	Delete
50 Backstroke	18/05/2020	4	01:30.25 PB	Edit	Delete

Previous Next Results 1 to 6 of 6 - To download data press 'Filter' above.

- If you wish to view everyone that participated on a certain date or at a certain event, go to 'reports,' 'people' and 'personal results'
- Update the filters to your requirements and click 'filter'
- This report can then be downloaded if required





10. Point of sale (POS)

Go to the 'POS' tab on the left-hand navigation menu.

10.1 Purchasing a shop item and paying at time of purchase

This is when a customer wants to buy an item and pay there and then.

- Either scan the barcode or search for the product by typing in the name
- If the customer is purchasing more than one of the same item, either click on the item again or enter the amount
- If they want to buy another item, scan or search again (note: you can add multiple items to the basket)
- The item must have a stock number in Udio for you to be able to sell it
- Once you've entered all the items, click 'checkout'



- Select the payment method; if the payment method is cash, enter the amount given to you by the customer and click 'confirm' - the bottom of the receipt will show the change due back to the customer
- This invoice can be printed if required

Order if7phol
Store: Training Town

water

Categories / Search

Water Flavour: Still
951
\$2.00

Basket Remove all items

1	Water Flavour: Still 951	\$2.00	Remove
2	Paddle Pop Flavour: Chocolate 9310016400505	\$3.00	Remove

Manage Discounts

Total Ex GST	\$4.72
GST	\$0.28
Total	\$5.00

Cancel order Assign Person Checkout

Payment receipt

Email receipt Print receipt

Tax invoice 17im5q-INV188

Date issued 29/10/2021
Account 17im5q
Facility Training Town
ABN 16 775 868 349

Date	Description	Tax	Amount
29/10/2021	2x 9310016400505: Paddle Pop	\$0.28	\$3.00
29/10/2021	951: Water	\$0.00	\$2.00
	Total		\$5.00
	Tax	\$0.28	

Payment

Date & time 29/10/2021 15:04 AWST
Token by Hayley Yeger
Amount \$20.00
Method Cash
Change \$15.00

10.2 Paying for fees and purchasing from shop at the same time or adding POS items to billing account

You can pay for fees and shop items in the same transaction.

- Go to the 'POS' section



- Scan or search for the product(s) the customer wants to buy
- Click on 'assign person,' then 'find person'
- Search name and select, then click 'take payment'
- Tick the invoice/s that you wish to pay and click 'proceed'
- Select payment method and click 'confirm'
- If there is an email listed for the customer, you can click 'send payment receipt'

Udio Order ivr2yph
Store: Training Town

Product Search

Categories

Accessories Aqua

Boys Canteen

Basket [Remove all Items](#)

1 Goggles
Colour: Purple
Style: Dynamo
695365874

[Remove](#)

[Manage Discounts](#)

Total Ex GST	\$18.14
GST	\$1.81
Total	\$19.95

[Cancel order](#) [Assign Person](#) [Checkout](#)

Udio Order ivr2yph

Items

Product	Attributes	SKU code	Quantity	Tax	Price, Each	Item total
Goggles	Colour: Purple, Style: Dynamo	695365874	1	\$1.81	\$19.95	\$19.95
Sub-Total						\$18.14
GST						\$1.81
Total						\$19.95

Choose Person

Jodie Cullingford [Deselect](#)

[Go back](#) [Skip person selection](#) [Take Payment](#)

Udio Make Payment

Select Invoices to Pay

Invoices:	Select	All	None			
<input checked="" type="checkbox"/> \$19.95	<input checked="" type="checkbox"/>	vk8by-INV78: 695365874: Goggles		Training Town	29/10/2021	
<input checked="" type="checkbox"/> \$57.90	<input checked="" type="checkbox"/>	vk8by-INV79: Learn To Swim (November 2021 / Samuel Cullingford)		Training Town	29/10/2021	

[Proceed »](#) [Go back to billing account](#)



10.3 Adding discount

- Scan or search for the item and click on 'manage discounts', then select the relevant discount from the drop down box
- Click 'checkout' to process the transaction and take payment

The screenshot shows the Udio POS interface for 'Order jsttww' at 'Store: Training Town'. The left sidebar contains navigation options: Dashboard, People, Sessions, Waiting List (with a red notification badge), POS (highlighted), Issues, Reports, and Settings. The main area displays a 'Product Search' bar and four category buttons: Accessories, Aqua, Boys, and Canteen. On the right, the 'Basket' section shows one item: 'Ear Bands Size: L' for \$5.00. Below the item, a red box highlights the 'Manage Discounts' button. The basket summary shows: Total Ex GST \$4.55, GST \$0.45, and Total \$5.00. At the bottom of the basket are buttons for 'Cancel order', 'Assign Person', and 'Checkout'.

This screenshot shows the same Udio POS interface, but with the 'Discount' dropdown menu open. The menu lists several options: '(no discount)' (selected with a checkmark), '-17.22% Balls discount', '-20% Staff Discount', '-20% Promotion to 100 Bronze', '-30% Swimwear discount', and '-50% Family Discount' (highlighted with a blue background). An orange arrow points from the 'Manage Discounts' button in the previous screenshot to this dropdown menu. The rest of the interface, including the sidebar, categories, and basket summary, remains the same.

