

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.

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

Contents

1. Tour of Udio **5**

2. Login **6**

2.1 First time user 7

2.2 Changing your password 7

3. The dashboard **7**

3.1 People search 7

3.2 Check-in 7

3.3 Recent people 8

3.4 Issues (management only) 9

3.5 Pending stock orders (management only) 9

3.6 New, leaving and returning customers 9

3.7 Upcoming sessions 10

3.8 Today's achievements 10

3.9 Today's course completions 10

3.10 Today's free bookings 10

3.11 Birthdays 10

3.12 Customer contact 11

3.13 Notes 11

4. Customer enquiries **12**

4.1 Customer enquiry 12

4.2 View billing account 13

4.2.1 Information within the billing account 14

4.2.2 View people attached to the billing account 16

4.2.3 View number of vouchers 16

4.3 Viewing sessions and availability 16

4.3.1 Calendar 18

4.3.2 Sheets 18

4.4 View activity 19

4.5 Unsubscribe or subscribe to emails 20

5. Add and edit **20**
5.1 Add/edit contact information 21
5.2 Add/edit relationships 21
5.3 Add/edit health issues 22
5.4 Add/edit a note 24
5.5 Add/edit bill payer 24
5.6 Add/edit/delete membership card 25
5.7 Add achievements and course completions 26
5.8 Add family to a billing group 28
5.9 Add/edit direct debit information 29
5.10 Add/edit vouchers 30

6. Attendance **32**
6.1 Checking a customer in 32
6.2 Taking payment and emailing or printing a receipt 32
6.3 Overpayment of an invoice 35
6.4 Resend an email 35
6.5 Print a duplicate receipt 37
6.6 Cancelling a lesson and issuing make up lesson 39
6.7 Missed attendance 39
6.8 Payment in advance 39
6.9 Printing sheets 40
6.10 Non-attendance 42

7. Bookings **42**
7.1 Adding a new family 43
7.2 Booking into a session 44
7.3 Booking a make up 46
7.4 Booking an assessment 48
7.5 Booking a casual Lesson 50
7.6 Booking a complimentary/free trial lesson 51
7.7 Booking multiple complimentary/free trial lessons 52
7.8 Re-enrolling a term-based customer 54
7.9 Adding a person to an existing family 54
7.10 Purchasing session vouchers 56
7.11 Moving a booking time and day (same course) 58
7.12 Moving a booking to another course 60

7.13 Moving a voucher-based booking such as school holiday program 61
7.14 Removing a booking 63
7.15 Sending an email manually 64
7.16 Sending link to customer portal 65

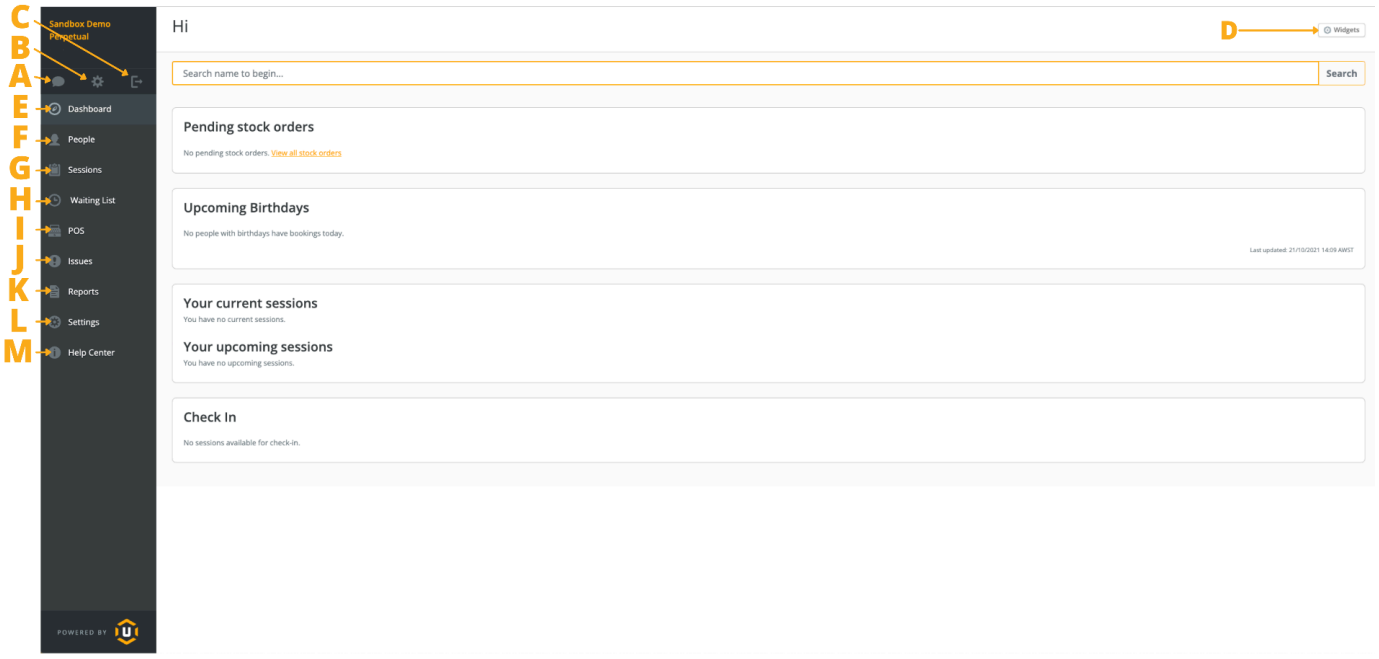
8. Waiting List 65
8.1 Adding a customer 66
8.2 Inviting a customer 67

9. Personal best results and awards 69
9.1 Viewing personal results 70

10. Point of sale (POS) 71
10.1 Purchasing a shop item and paying at time of purchase 71
10.2 Paying for fees and purchasing from shop at the same time or adding POS items to billing account 72
10.3 Adding discount 74

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

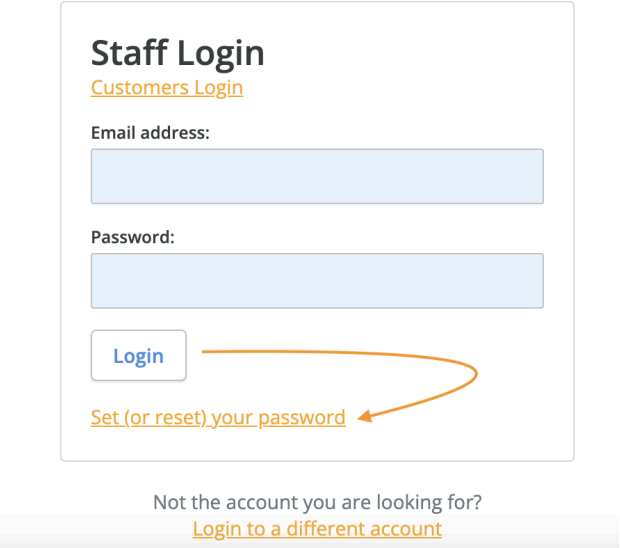
K. **Reports** - a snapshot of the facility/location, its activity and financial information, with easy access to all reports, such as booking statistics and outstanding invoices

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



- 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

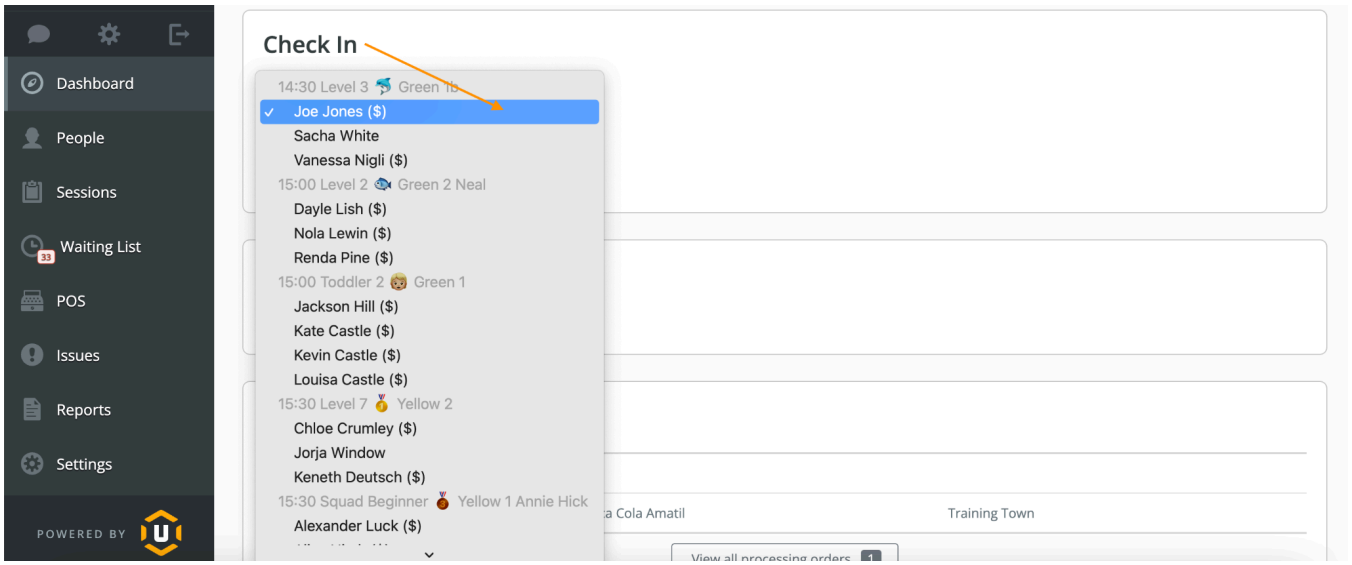
- You can search for a person from the search bar; type in full or partial name, email address or phone number - click 'search' or hit 'enter'

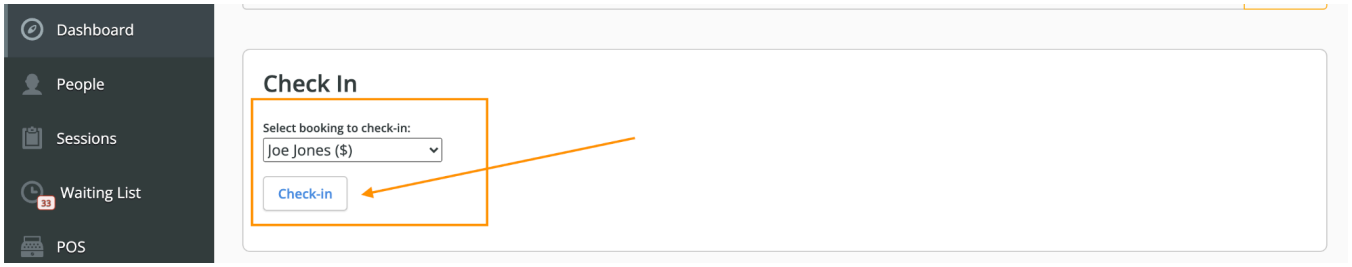


3.2 Check-in

- 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

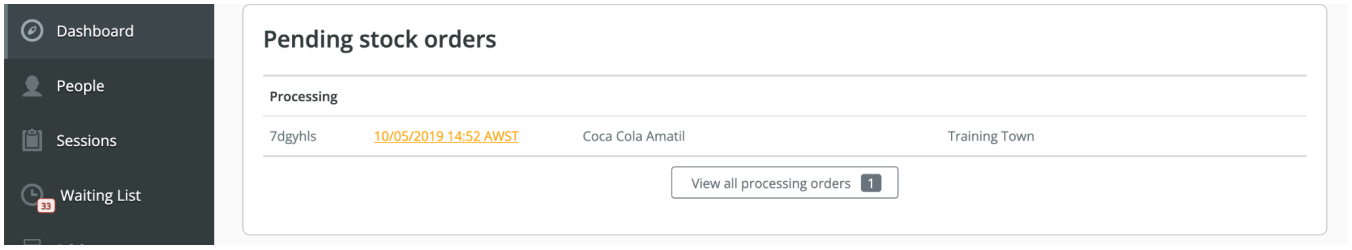


3.4 Issues (management only)

- 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



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

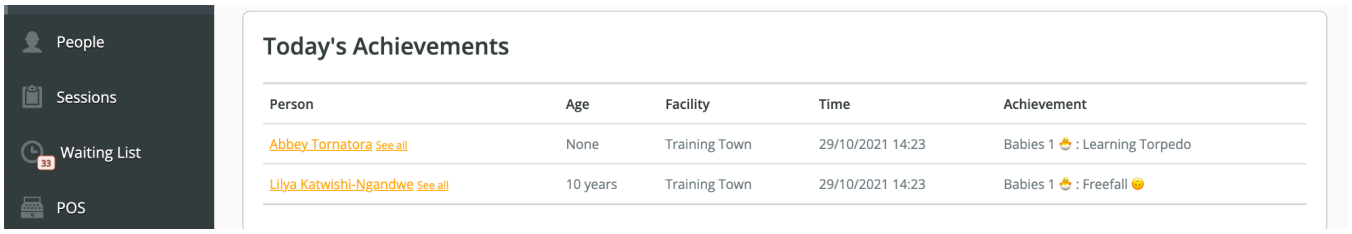


3.7 Upcoming sessions

- 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



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

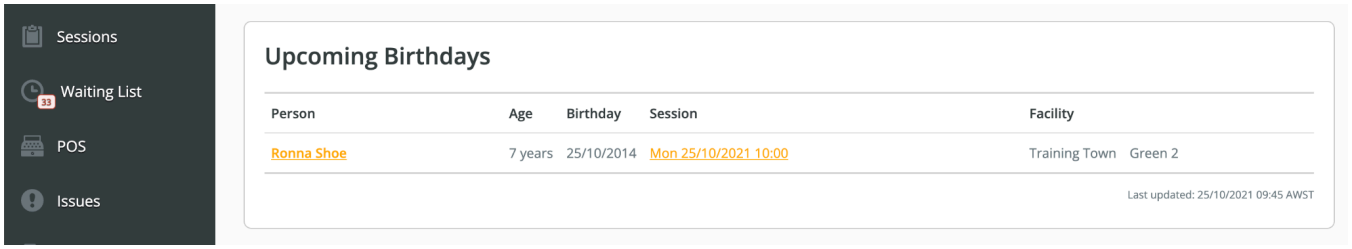
3.10 Today's free bookings

- 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

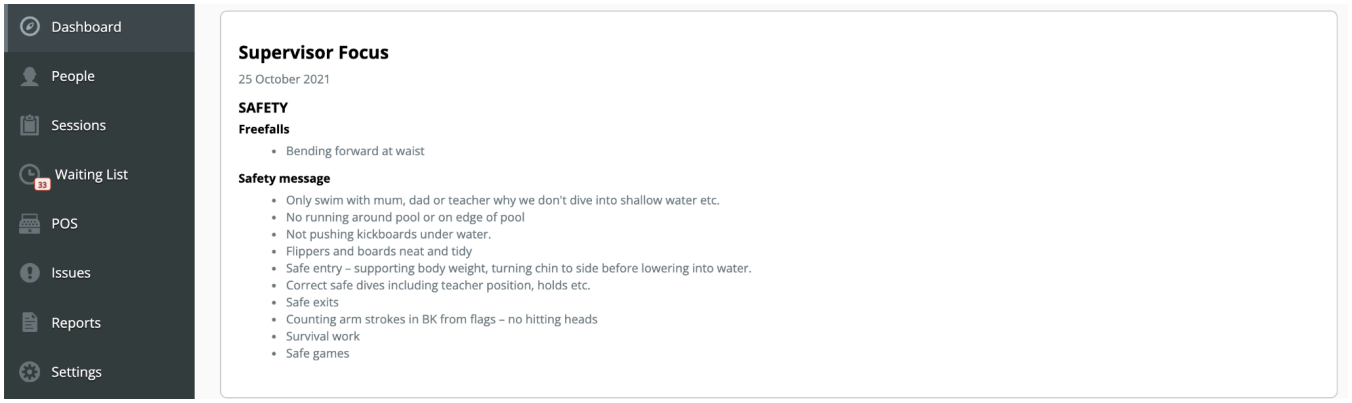


3.12 Customer contact

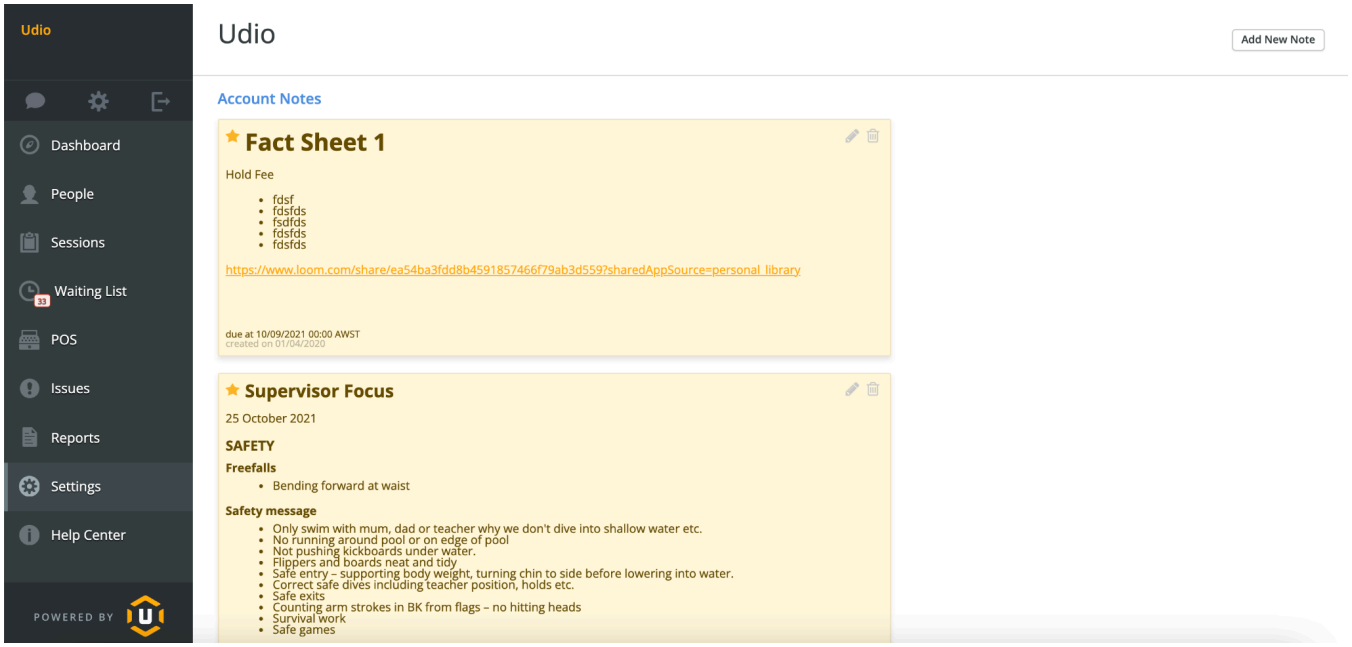
- Highlights customers that have not been contacted (or spoken to in x number of days)
- Helps shift supervisors identify who they need to speak to while on shift

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



- 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

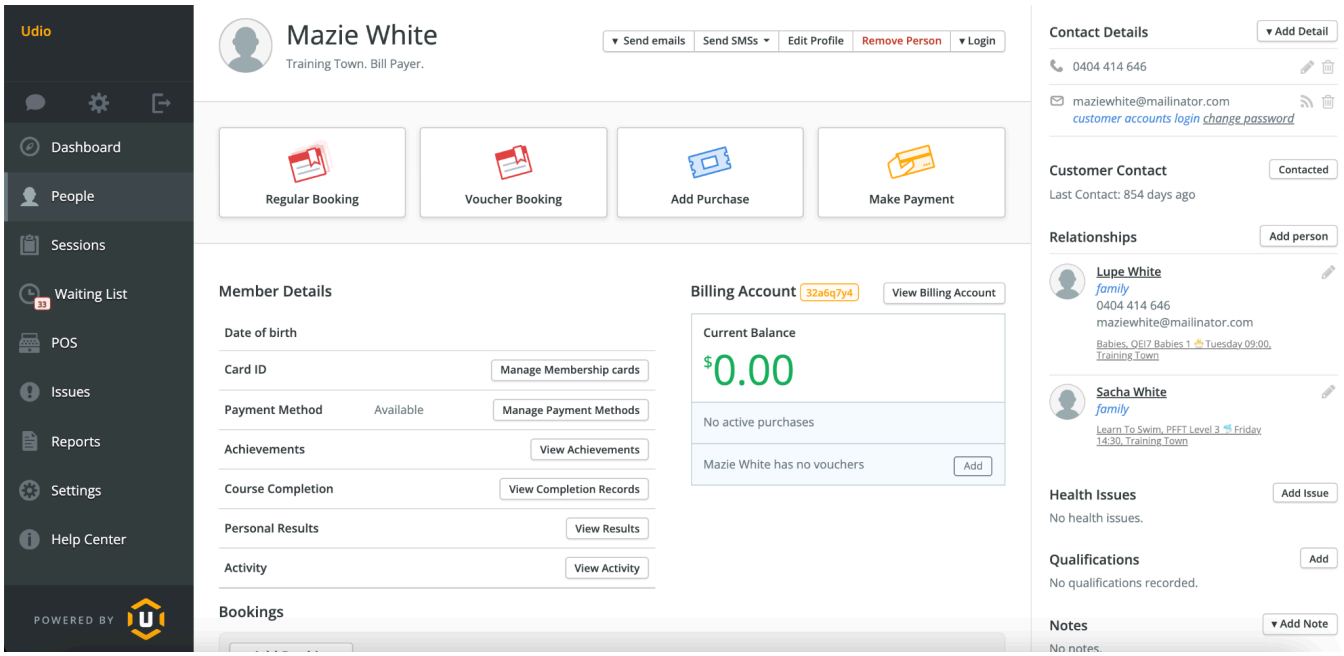
4.1 Customer enquiry

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.

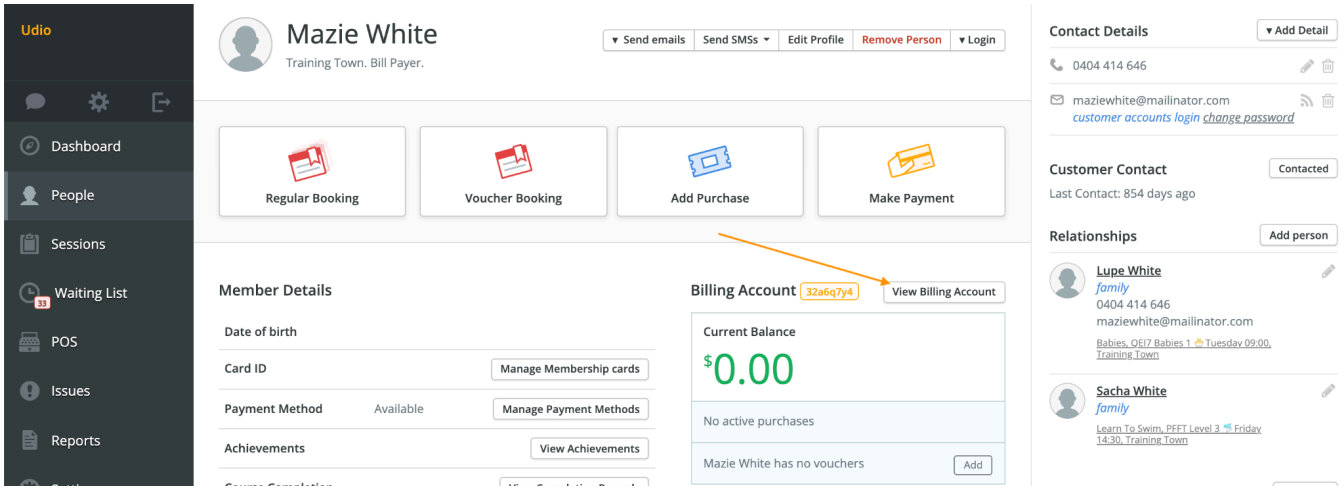


4.2 View billing account

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.



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, QEI7 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, QEI7 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

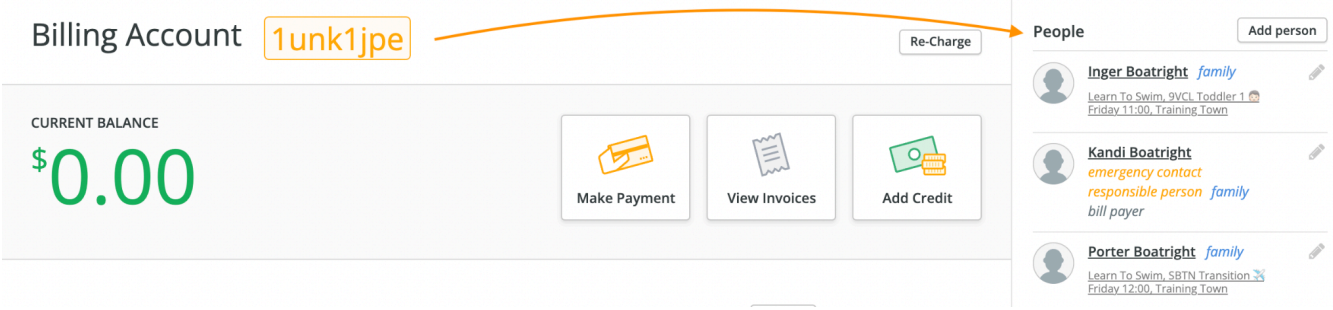
Notes

Add New

No notes.

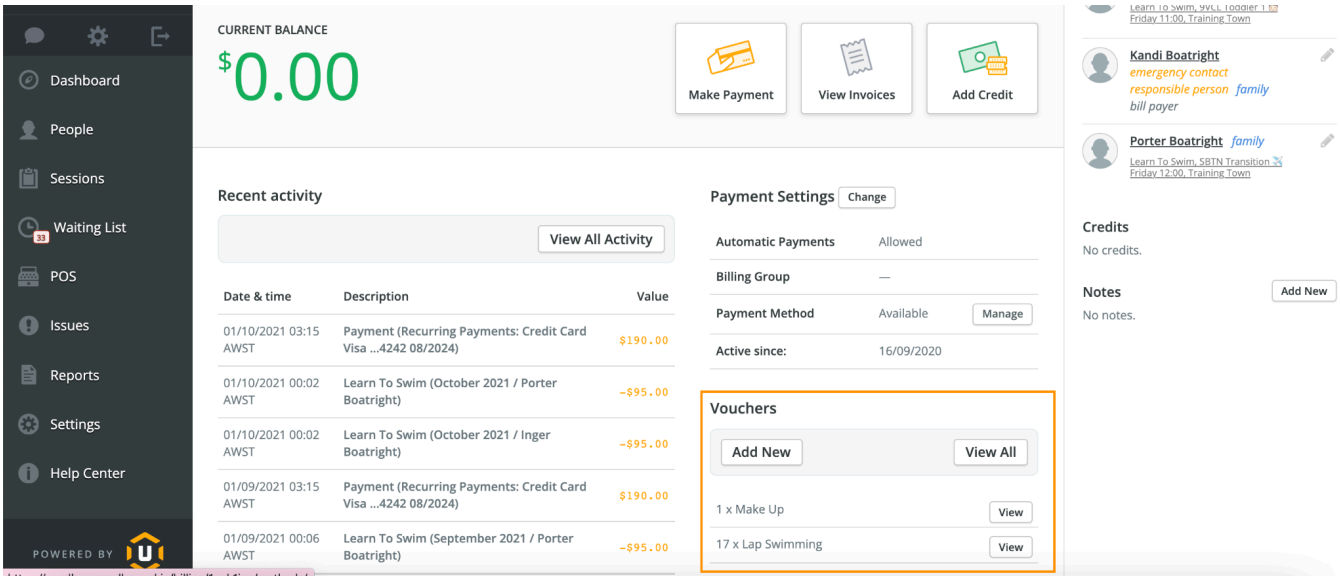
4.2.2 View people attached to the billing account

- 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



4.2.3 View number of vouchers

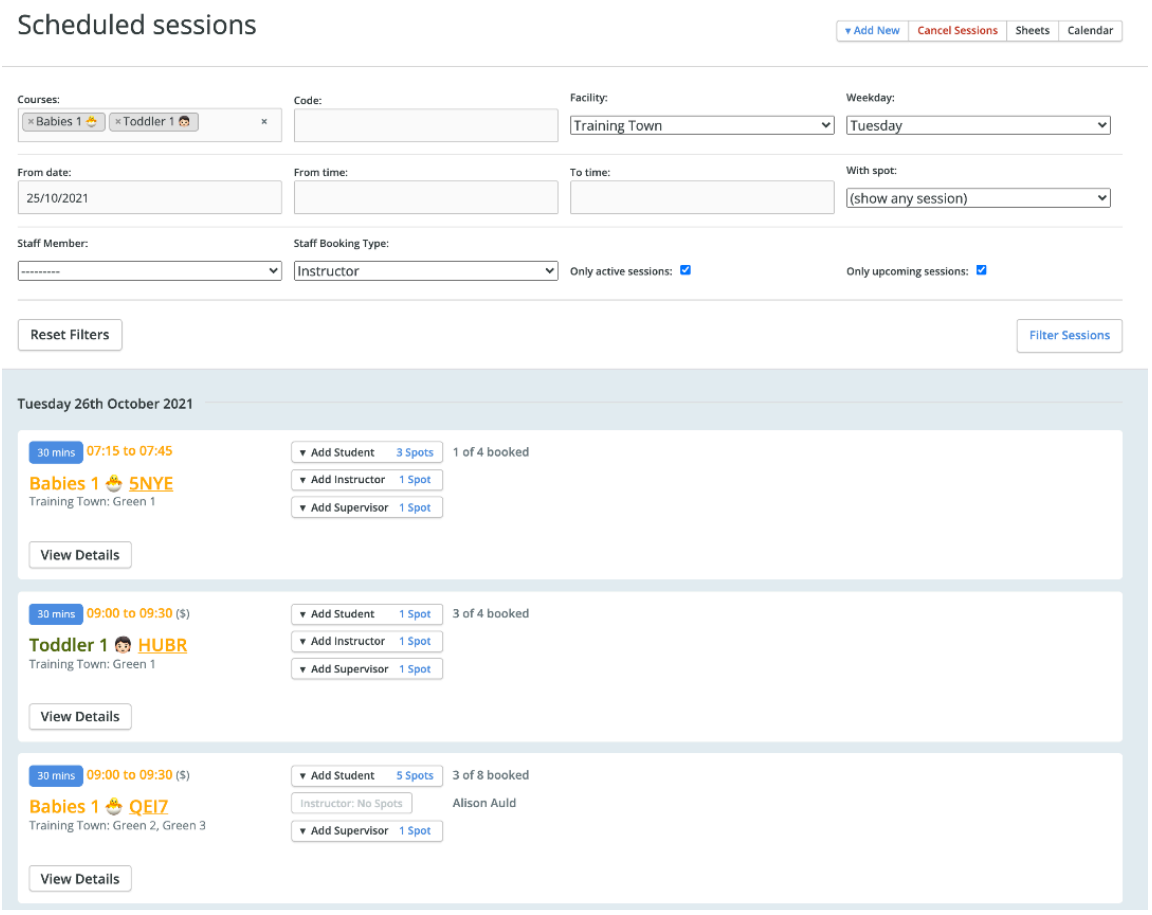
- At a glance, you can see how many make up vouchers there are as well as session passes
- Select 'view all' to view all available vouchers as well as closed or expired vouchers; closed vouchers will display which session they were used in



4.3 Viewing sessions and availability

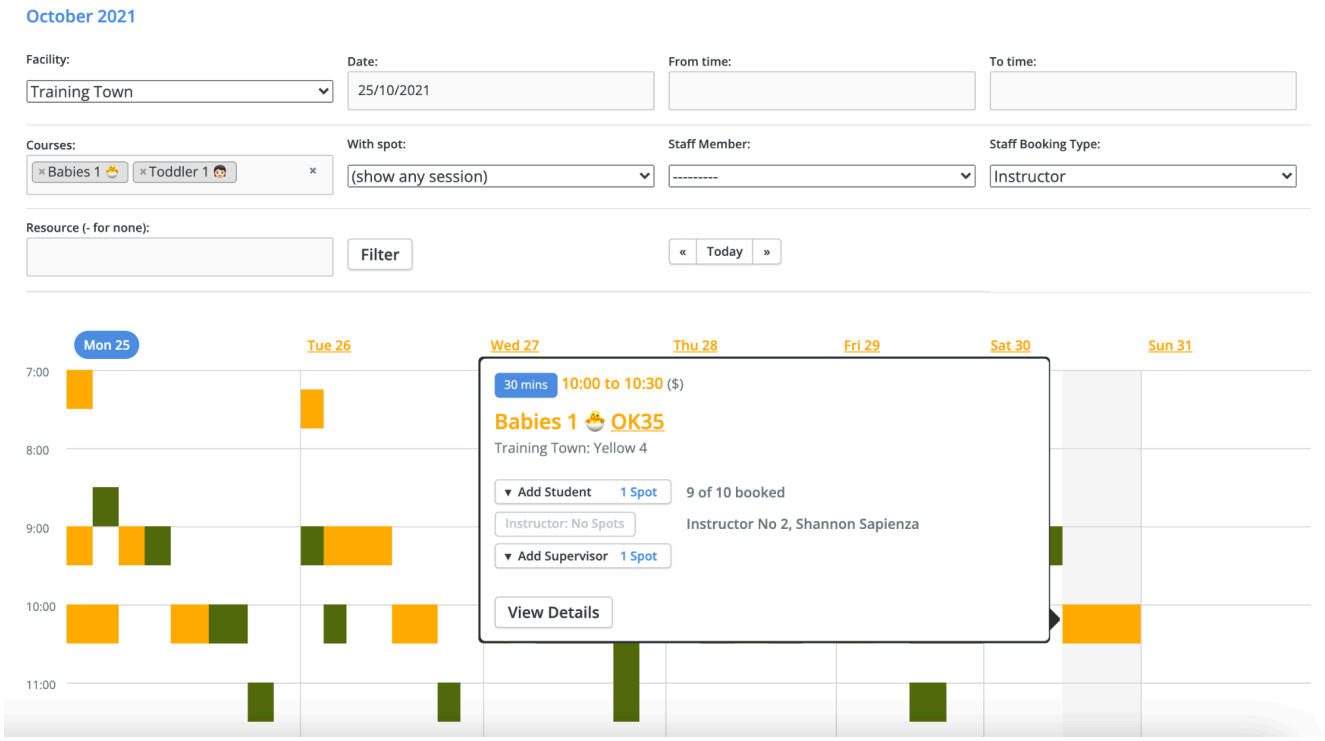
- Go to 'sessions' in the left-hand menu

- 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



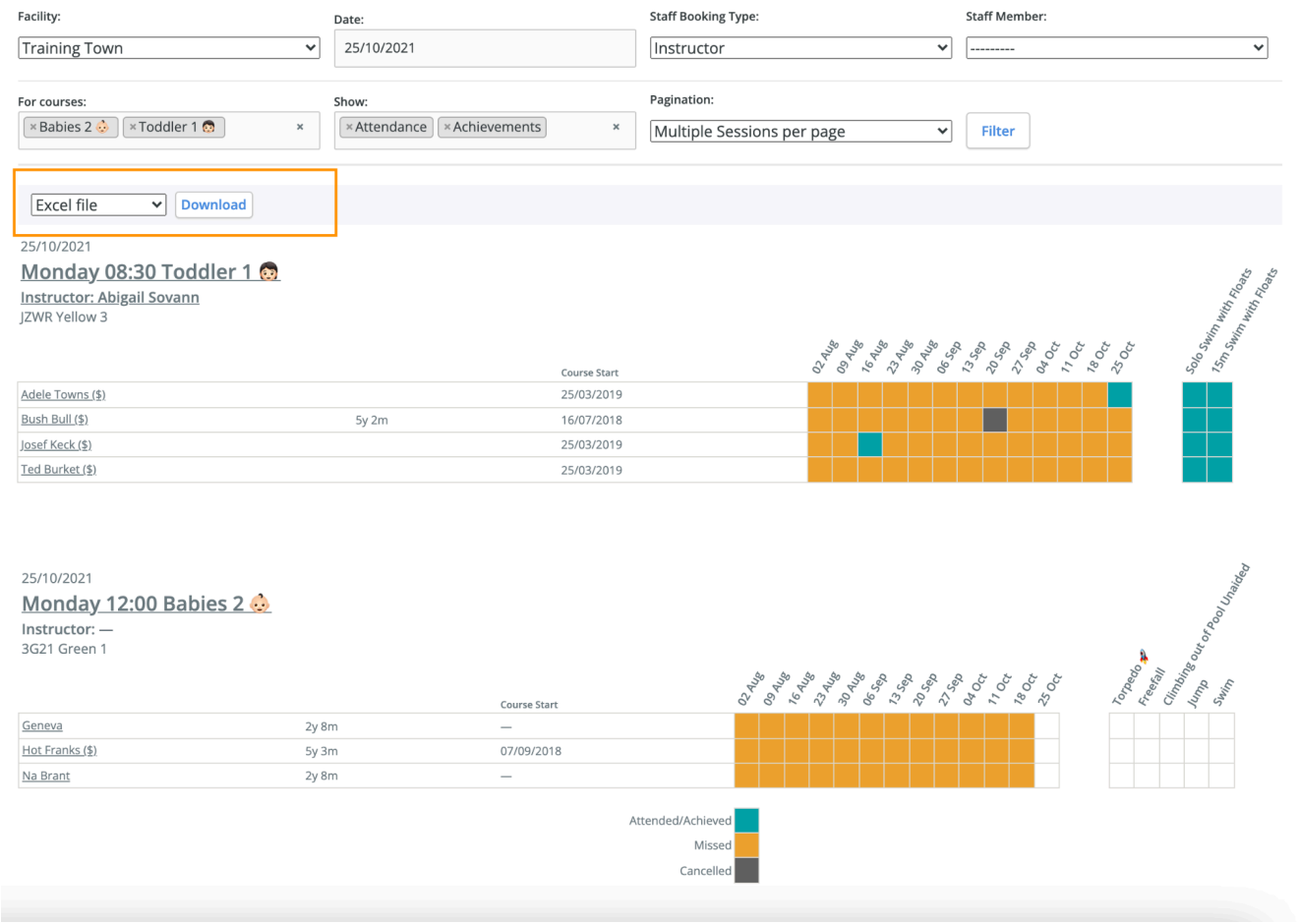
4.3.1 Calendar

- 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



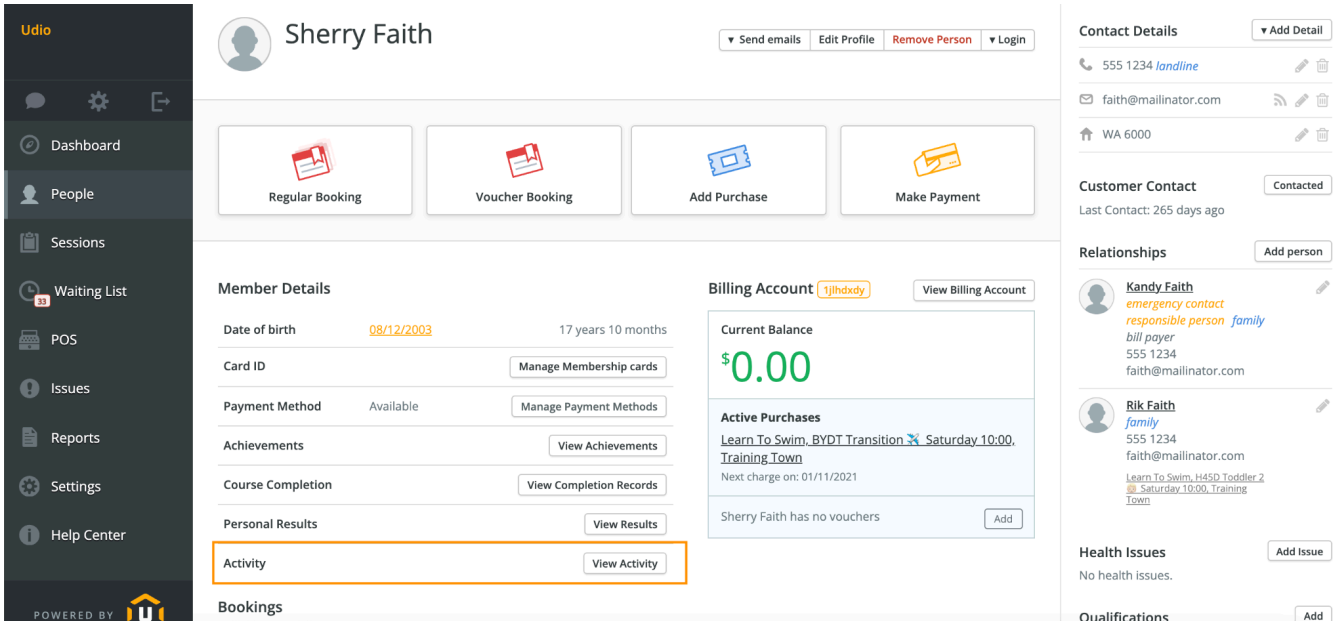
4.3.2 Sheets

- 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



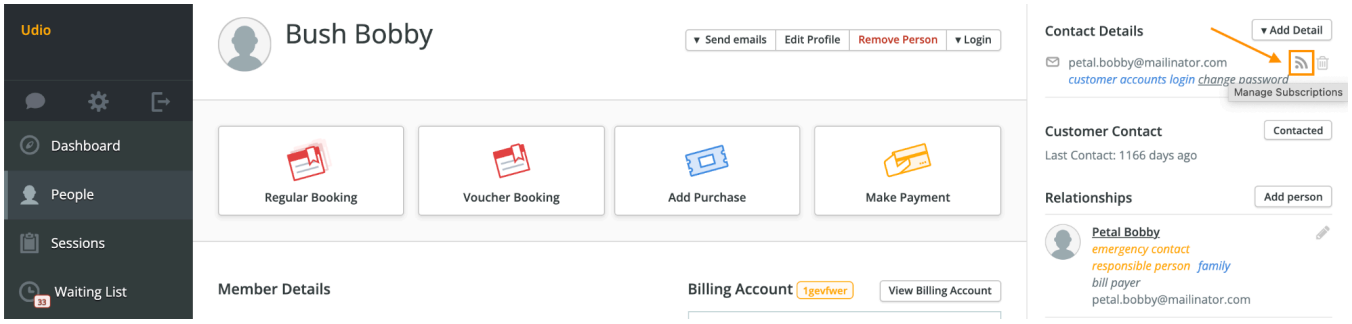
4.4 View activity

- 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

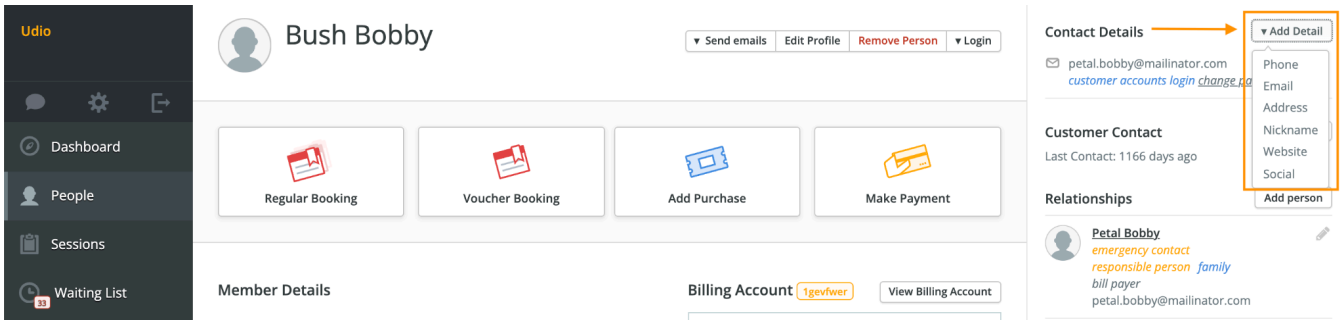


5. Add and edit

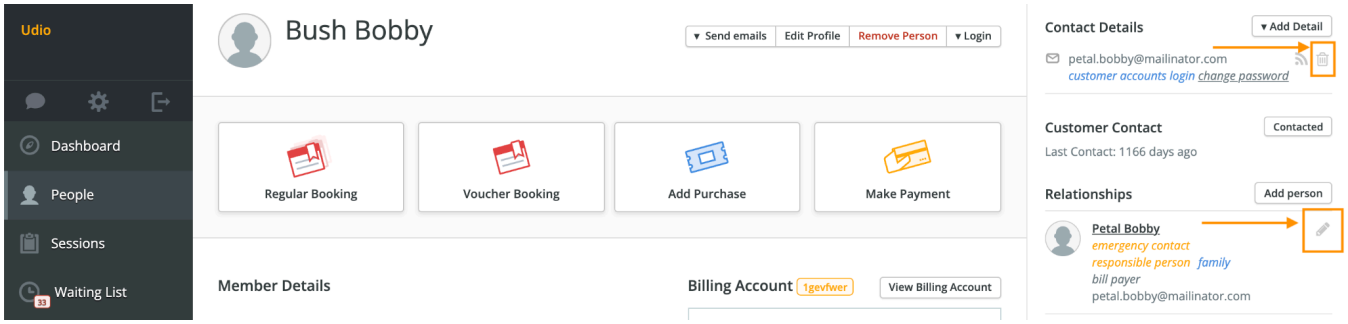
To add or change details, go to the people page of the customer you want to update or view.

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

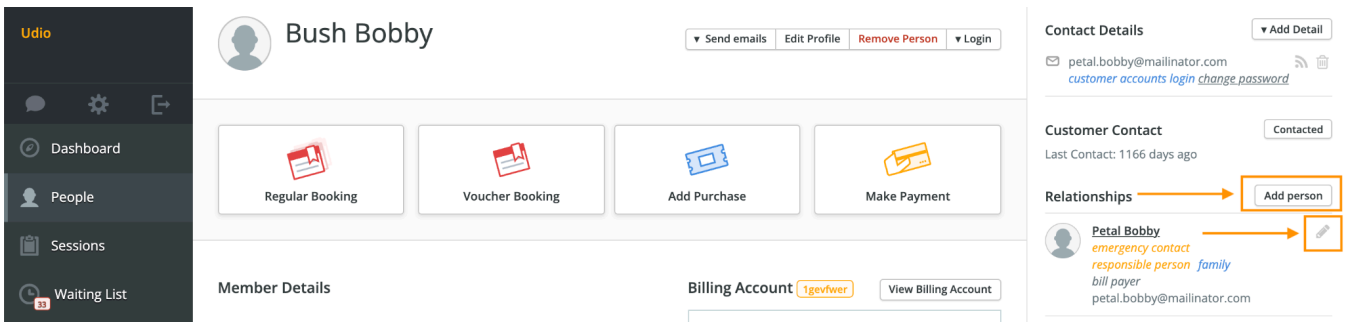


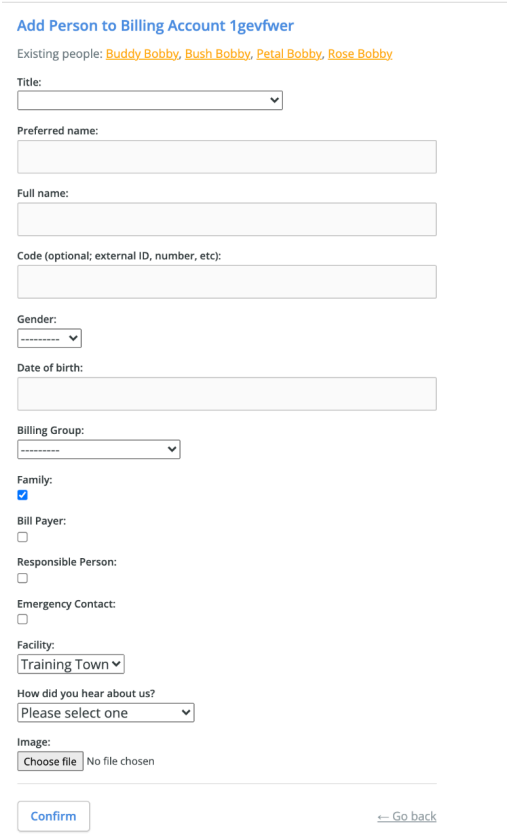
- To edit existing information, click on the pen, make the change and click ‘confirm’
- To delete, click on the trash can and ‘confirm’



5.2 Add/edit relationships

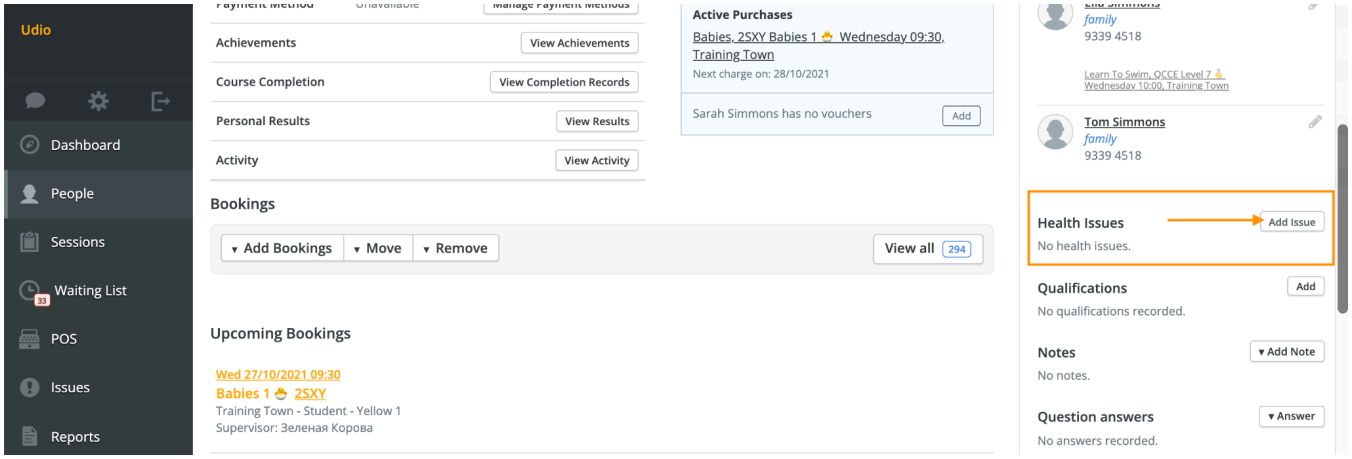
- To add a relationship, click on ‘add person’, complete the details and click ‘confirm’ - the related party will be added to the billing account
- You can edit by clicking on the pen and clicking ‘confirm’

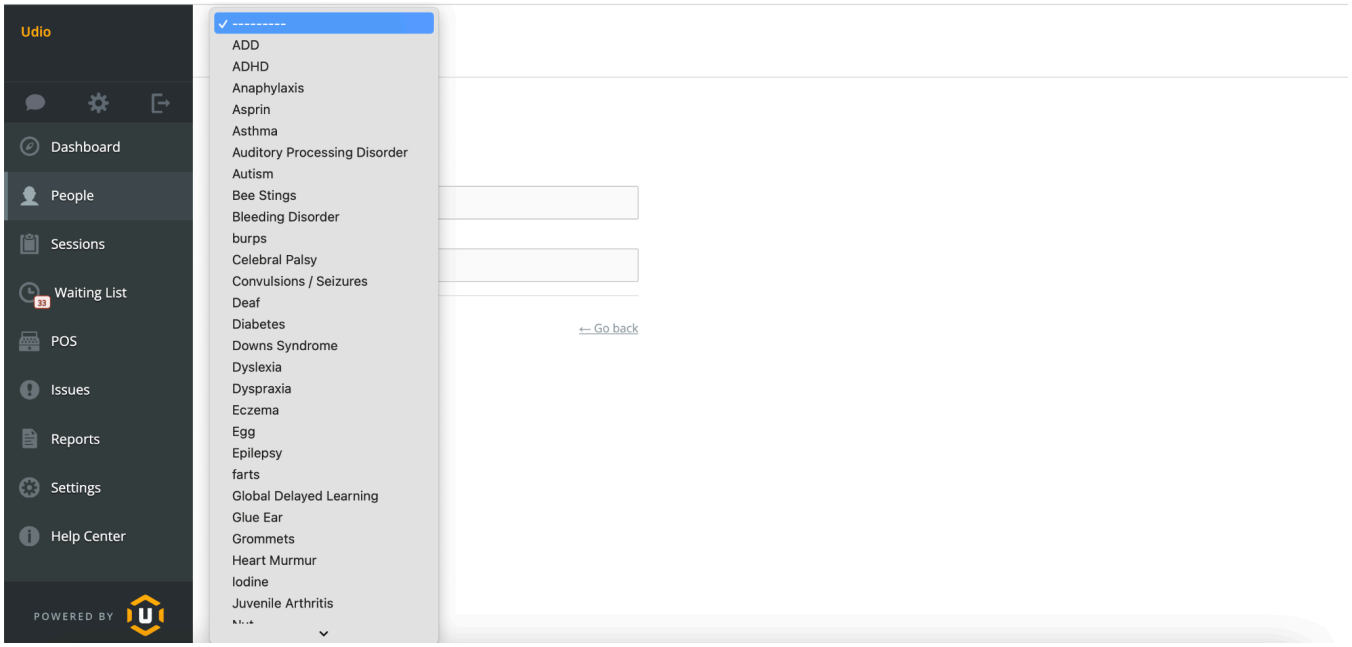


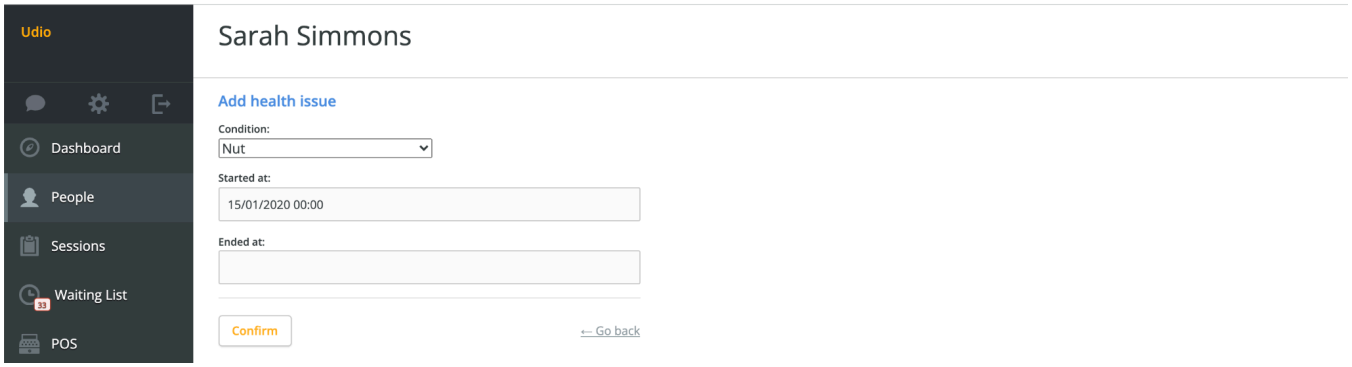


5.3 Add/edit health issues

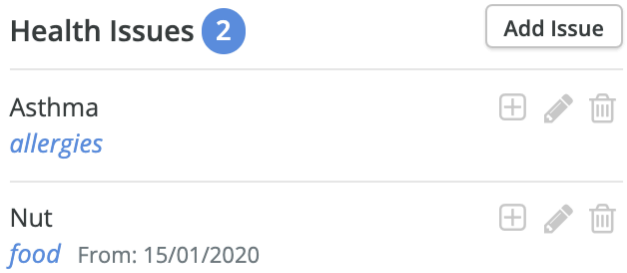
- Click on the ‘people’ section, search for their name and open their page
- Click on ‘add issue’, select the condition from the drop-down menu and add a start and end date if required







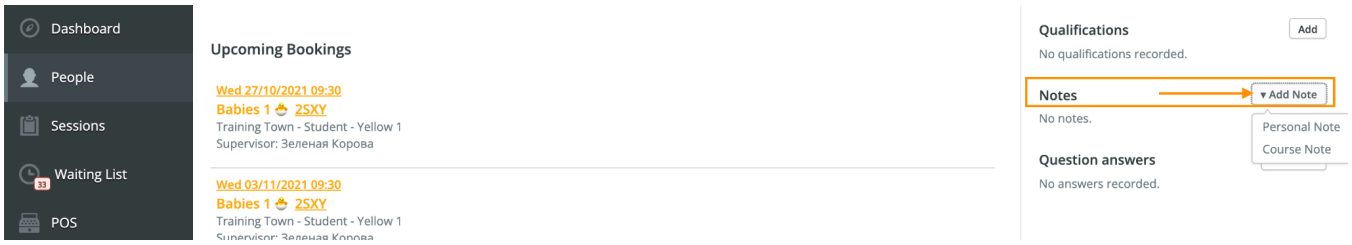
- To edit, click on the pen
- To add an image or PDF, click on the box with the + sign in it, enter the details, name the file and ‘choose file’ to upload before clicking ‘confirm’
- A number indicates a health issue which will change depending on how many health issues are listed
- Health issues are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



5.4 Add/edit a note

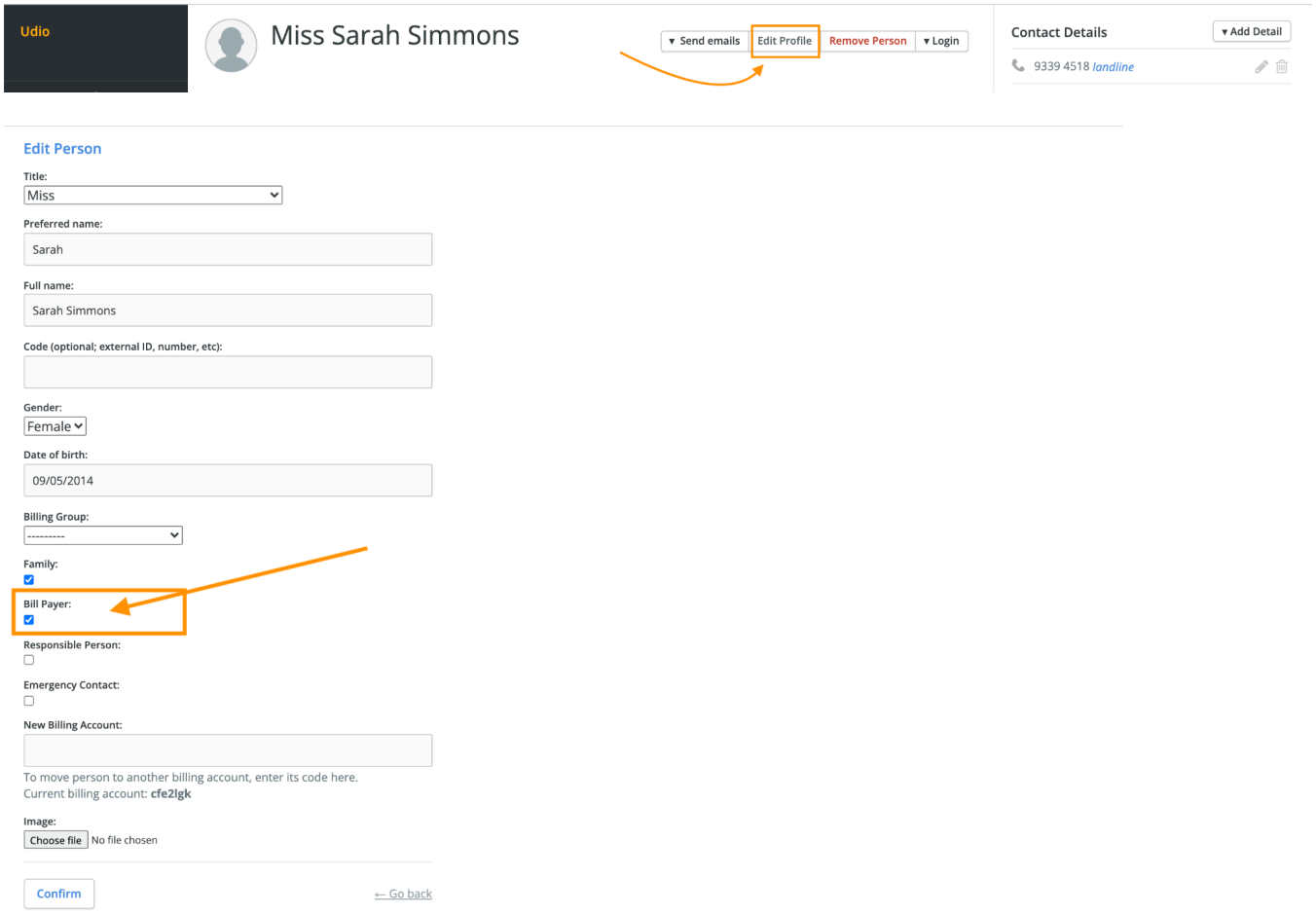
There are two types of notes: course and personal. Course notes show up on the sessions and sheets pages. Personal notes are displayed as a label on the sessions page. You can add or edit a note on either the 'people' page or 'billing account'.

- 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

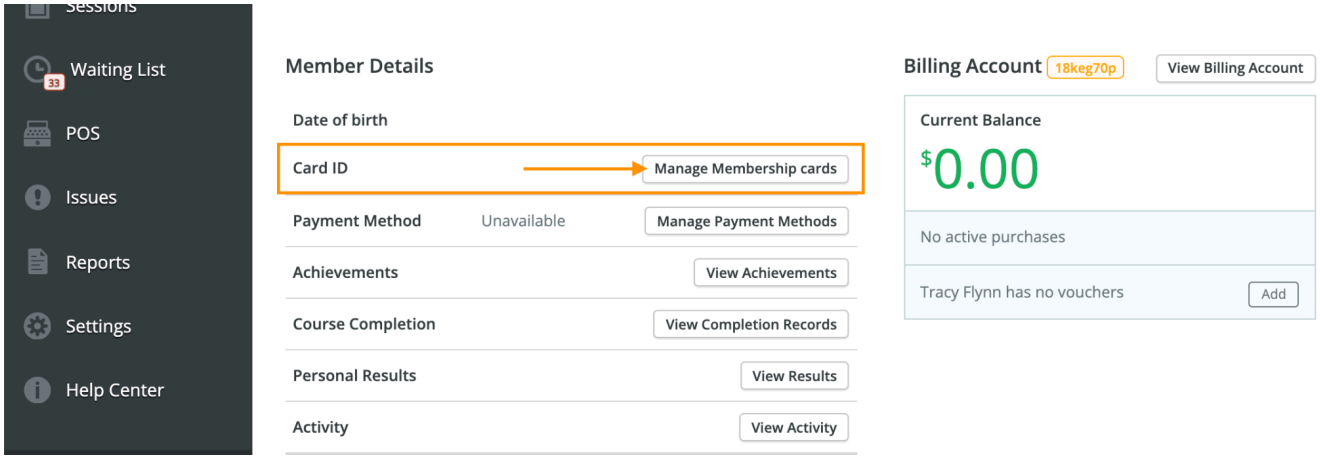


5.6 Add/edit/delete membership card

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':

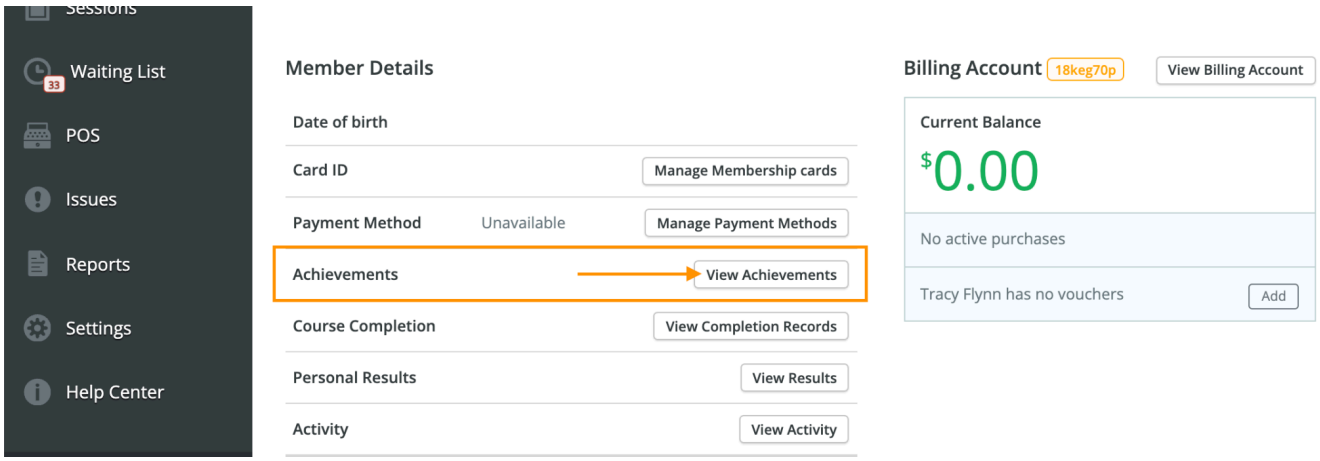
- Click on 'manage membership cards'
- Select 'add membership card'
- Enter the card number or scan in the details if you have a barcode scanner
- You can also edit or delete details

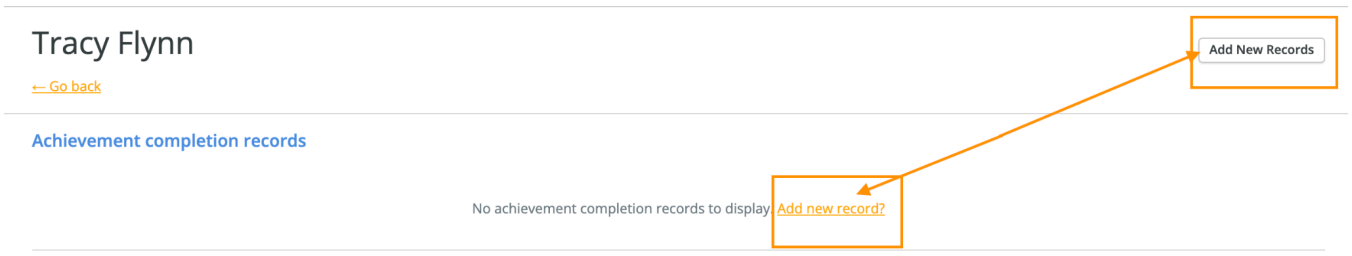


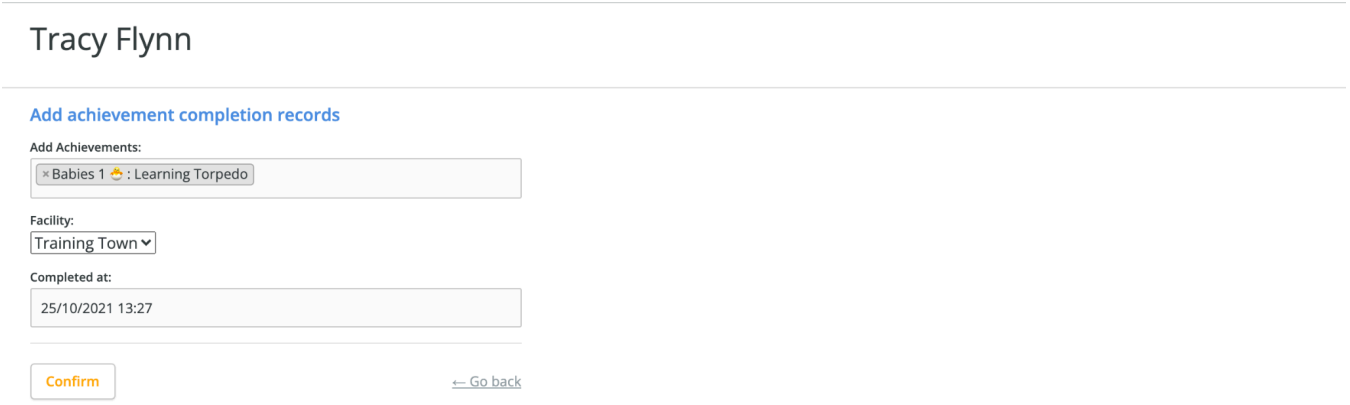
5.7 Add achievements and course completions

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'

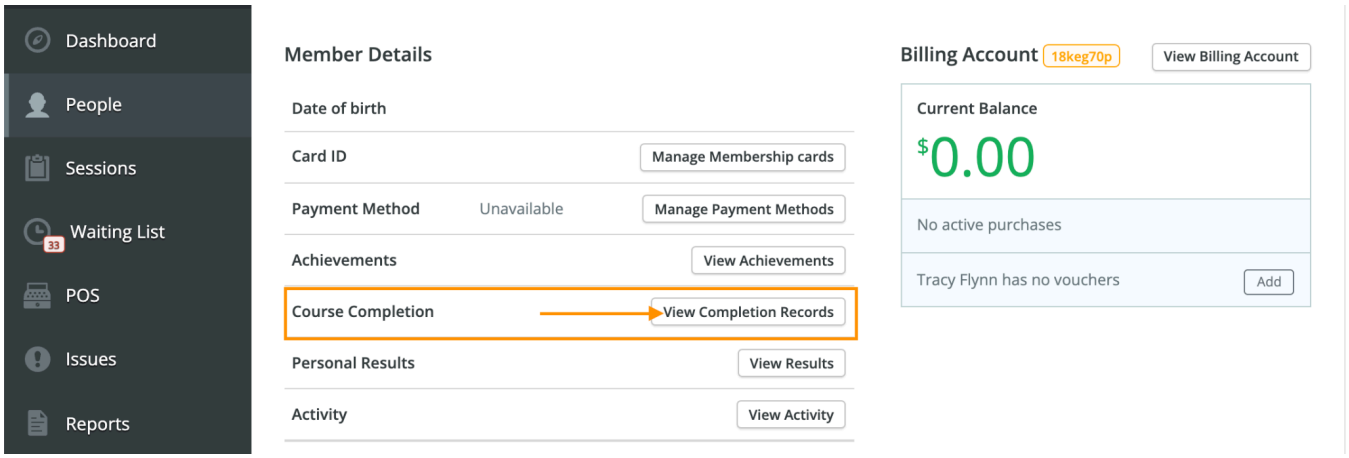


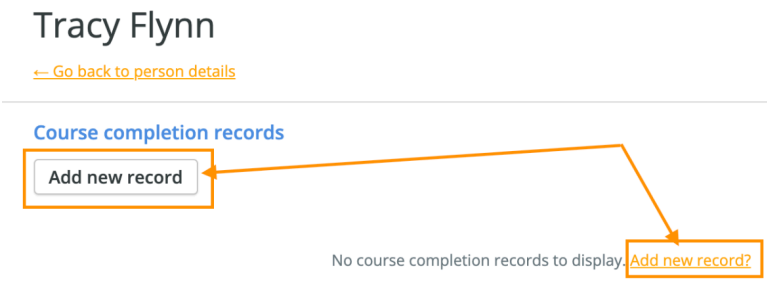


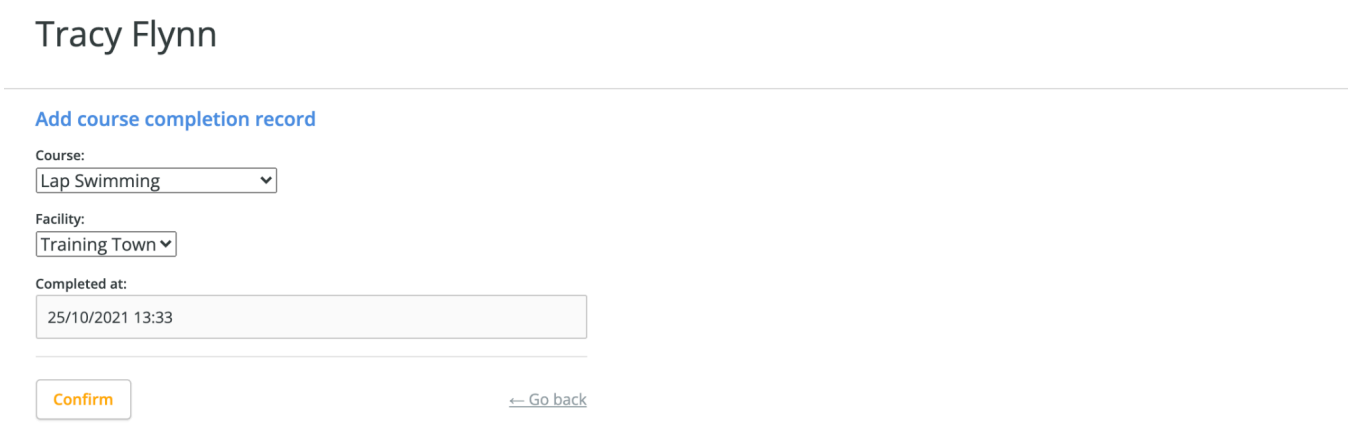


The same process occurs to add a course completion:

- 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’



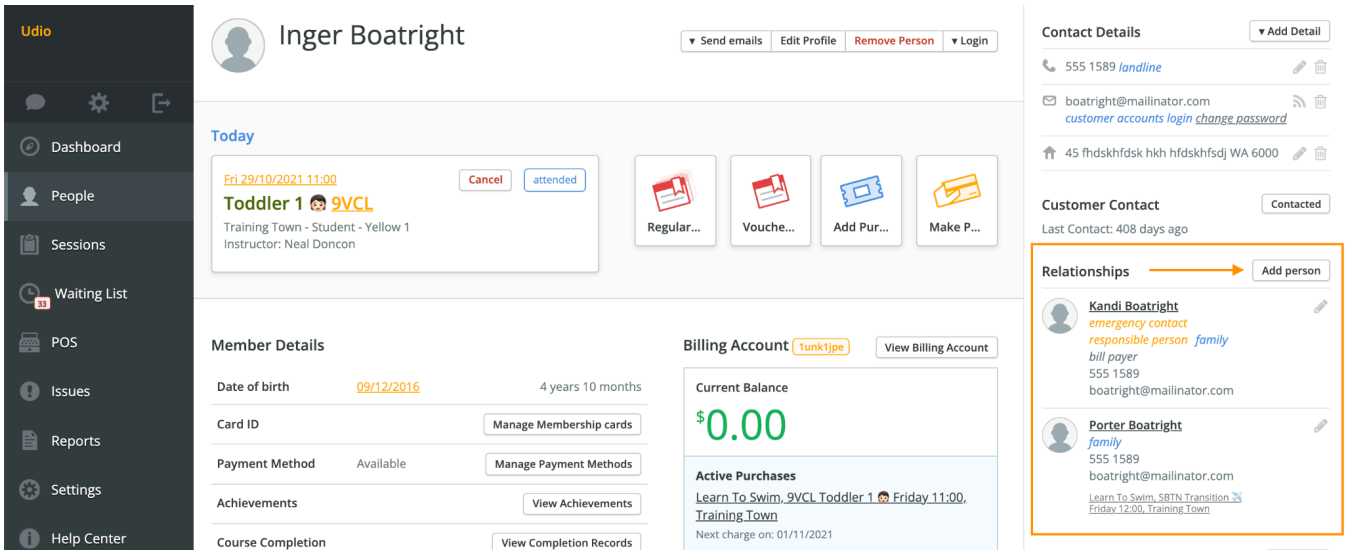




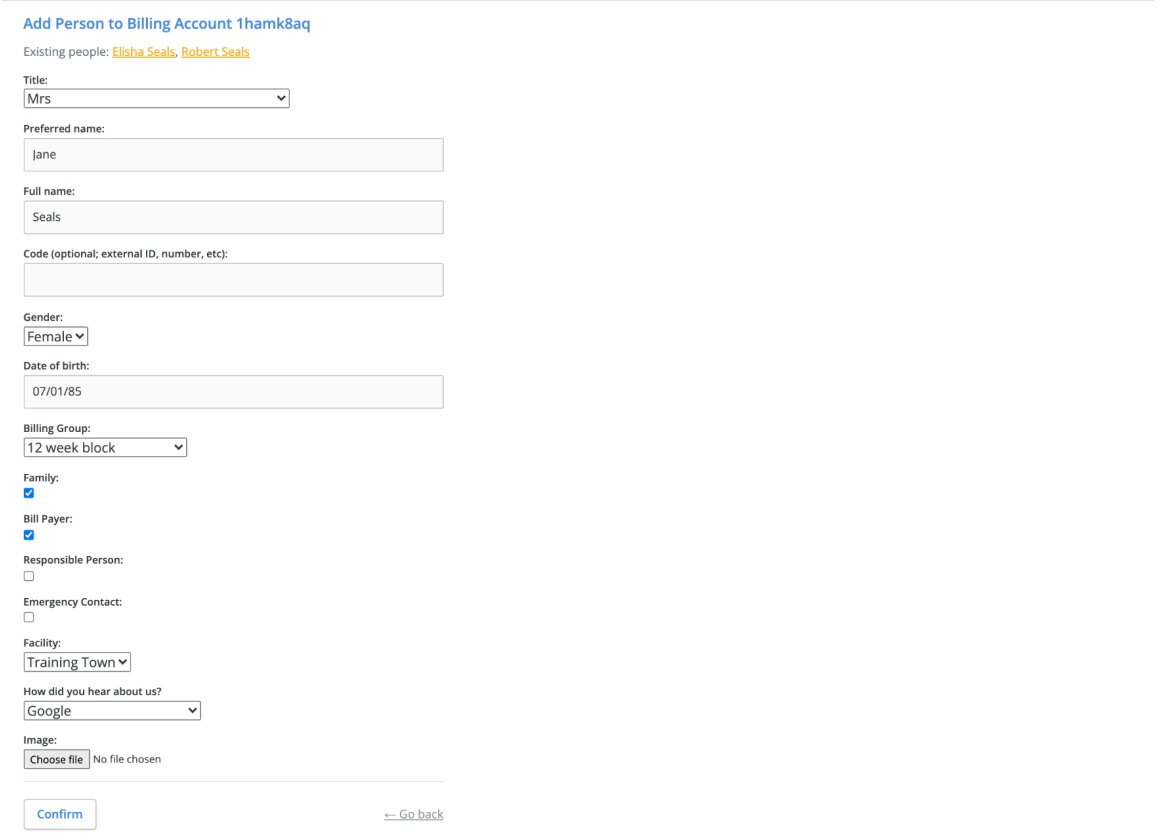
This information is displayed on your dashboard under 'today's achievements' and 'course completions'.

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

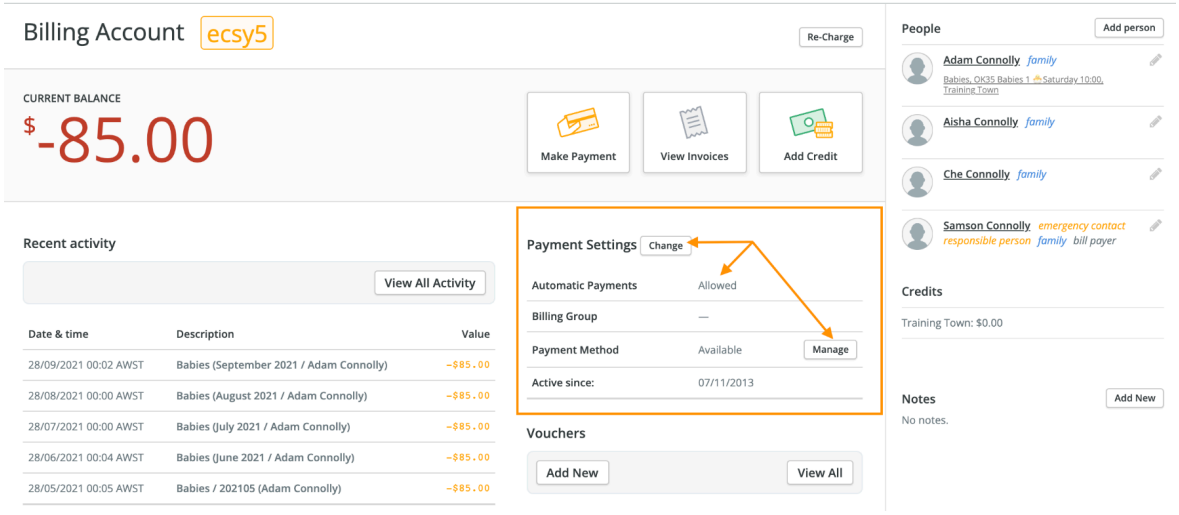


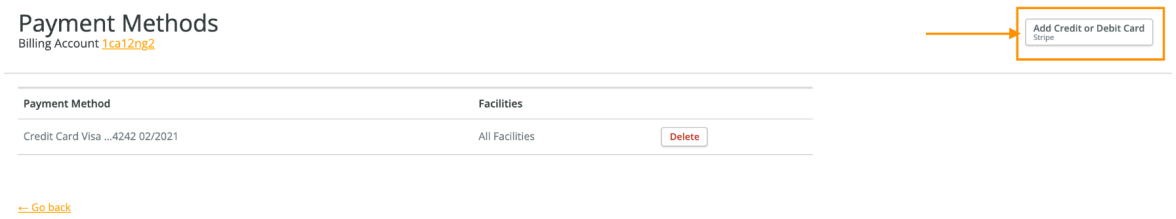
People



5.9 Add/edit direct debit information

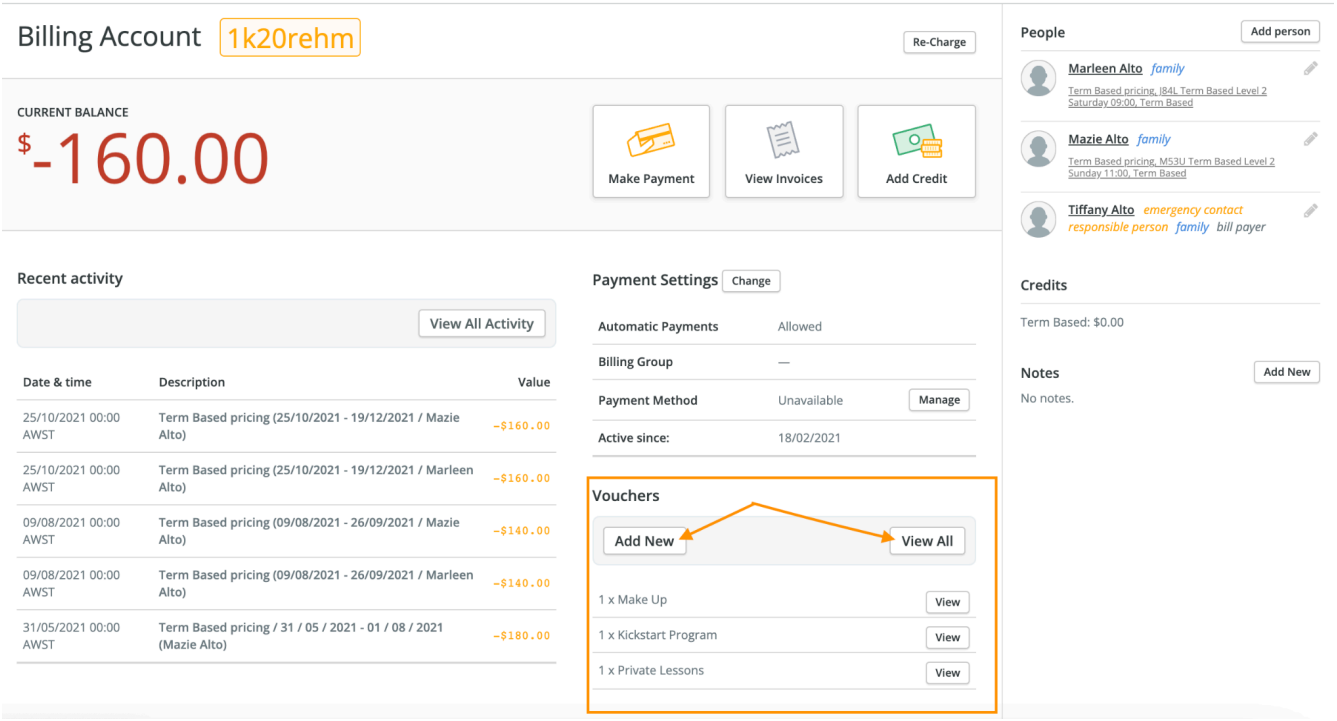
- Navigate to the person's billing account, ensuring all contact information is updated and correct
- Under 'payment settings' check that 'automatic payments' is set to 'allowed'; if not, click on 'change' and tick 'allow automatic payments'
- Click 'manage'
- Click on 'add new DDR' or 'add credit or 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



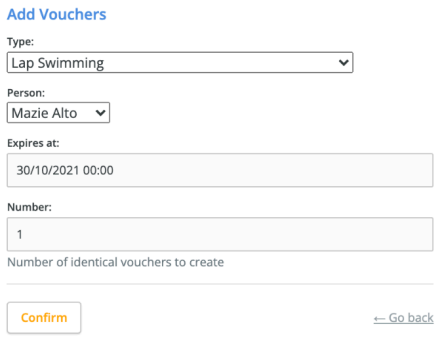


5.10 Add/edit vouchers

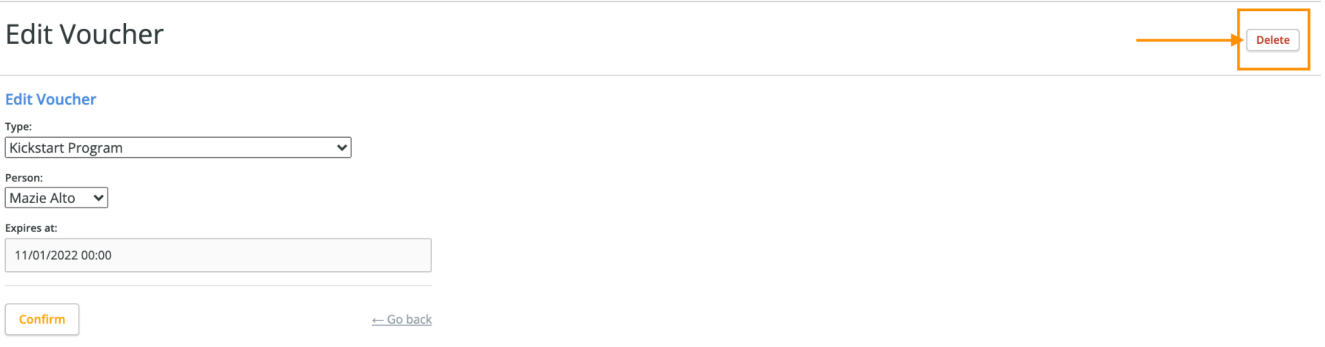
- In the billing account, click on ‘add new’, under vouchers, select the voucher type such as make up or lap swimming, choose the person and add an expiry date if applicable, then click ‘confirm’
- To delete, click on ‘view all’ next to the voucher to be deleted, click ‘edit’, then ‘delete’ and ‘confirm’



Add Vouchers



Edit Voucher



6. Attendance

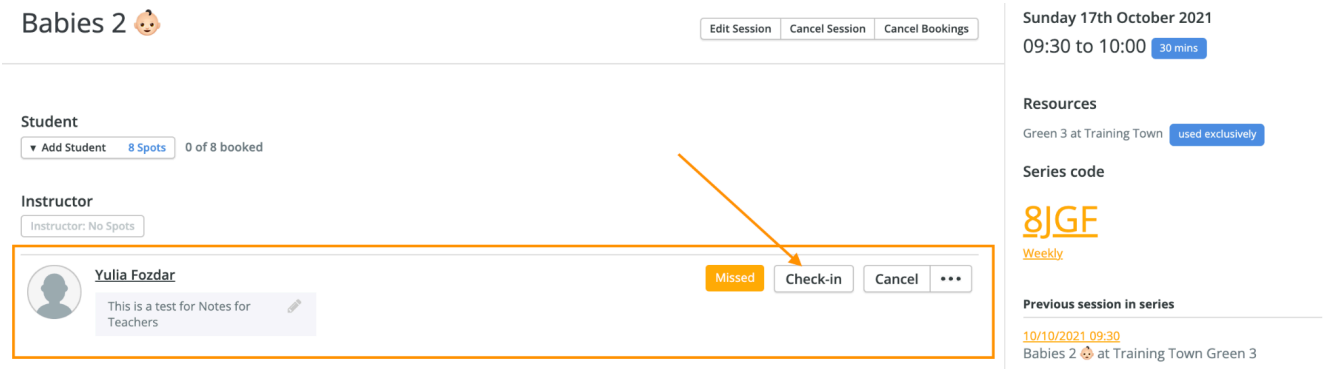
6.1 Checking a customer in

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.



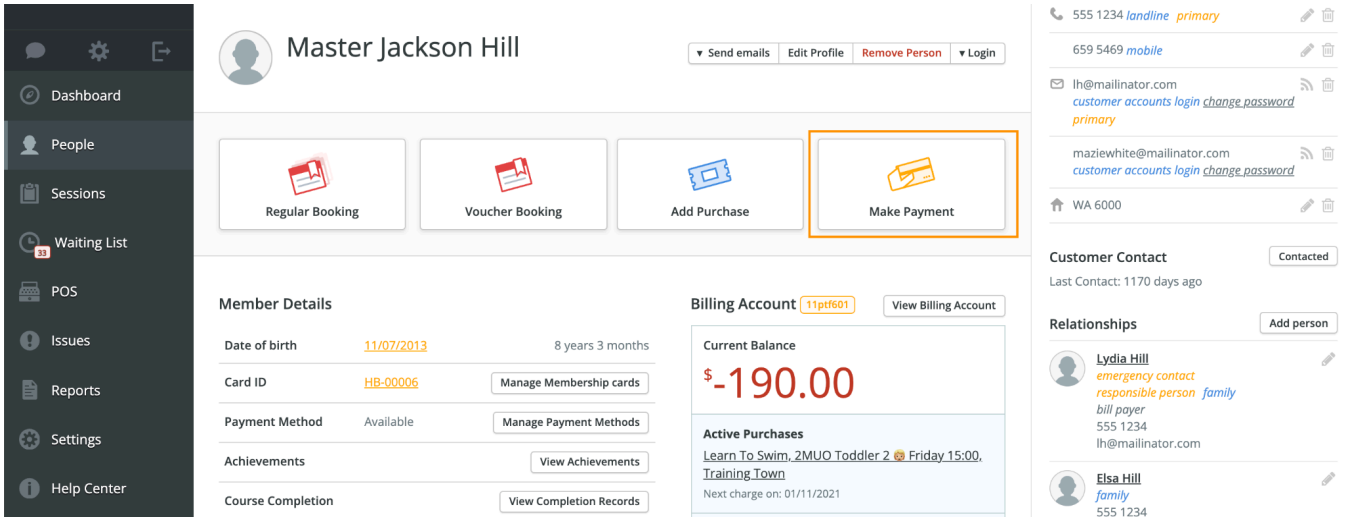
6.2 Taking payment and emailing or printing a receipt

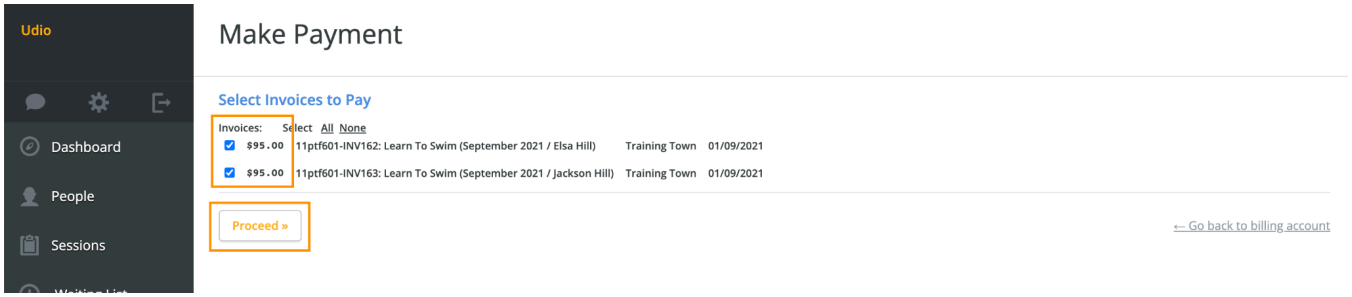
To make payment on an account, you don't need the POS module; there is a 'make payment' button on the people page of each family member and in the billing account.

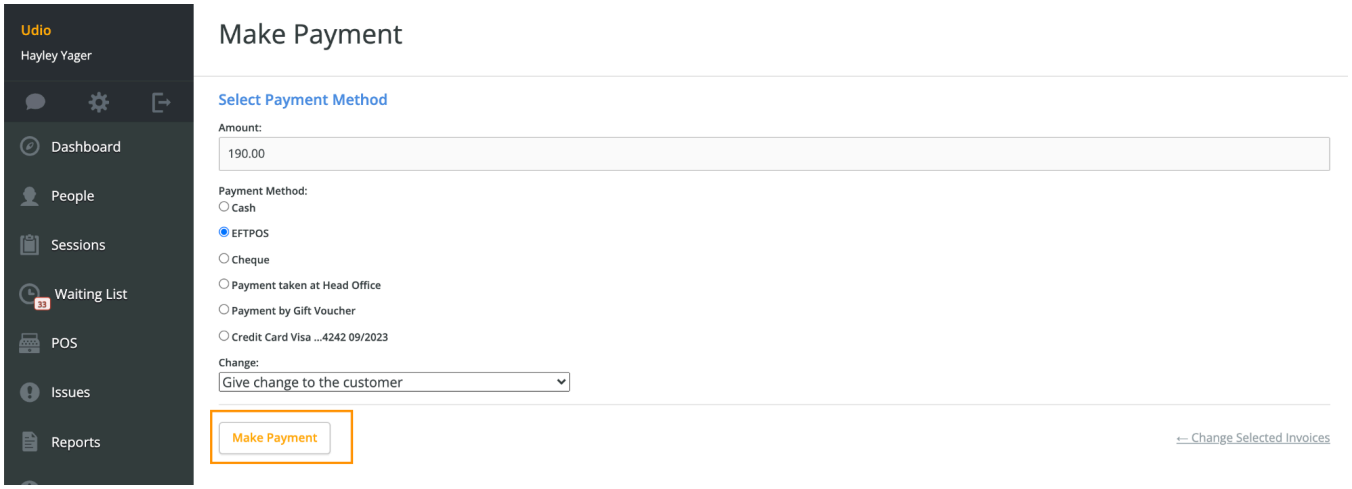
- Once on a person's profile, click 'make payment'

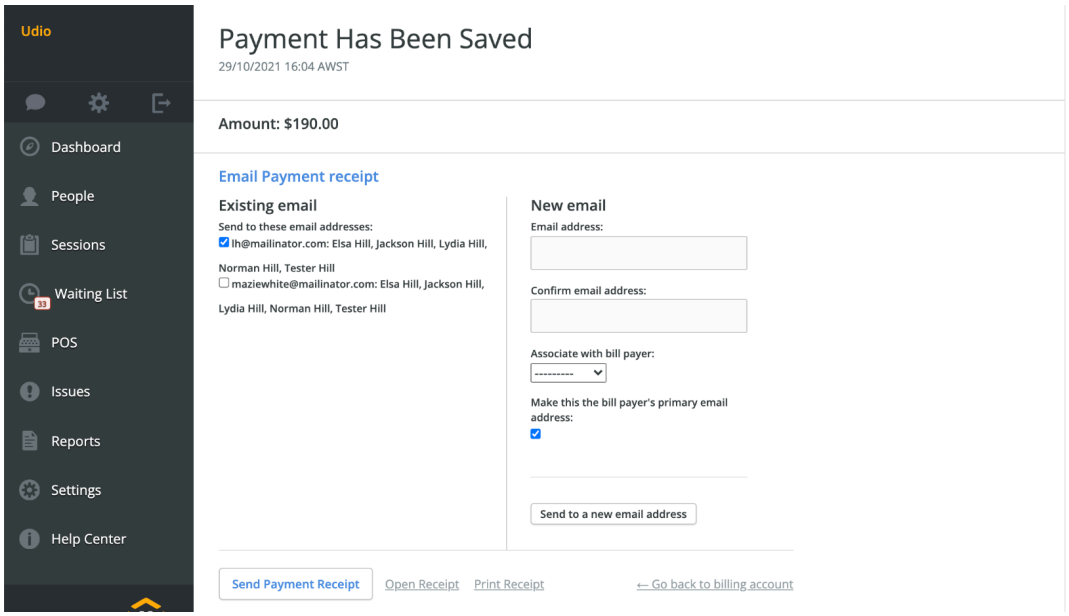
- Select the invoice/s to be paid
- Click ‘proceed’
- Select the payment method
- Update the amount if paying in cash or a part payment
- Click ‘make payment’
- The amount and change will be displayed, as well as the email information
- Click ‘send payment receipt’
- The payment invoice will be displayed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

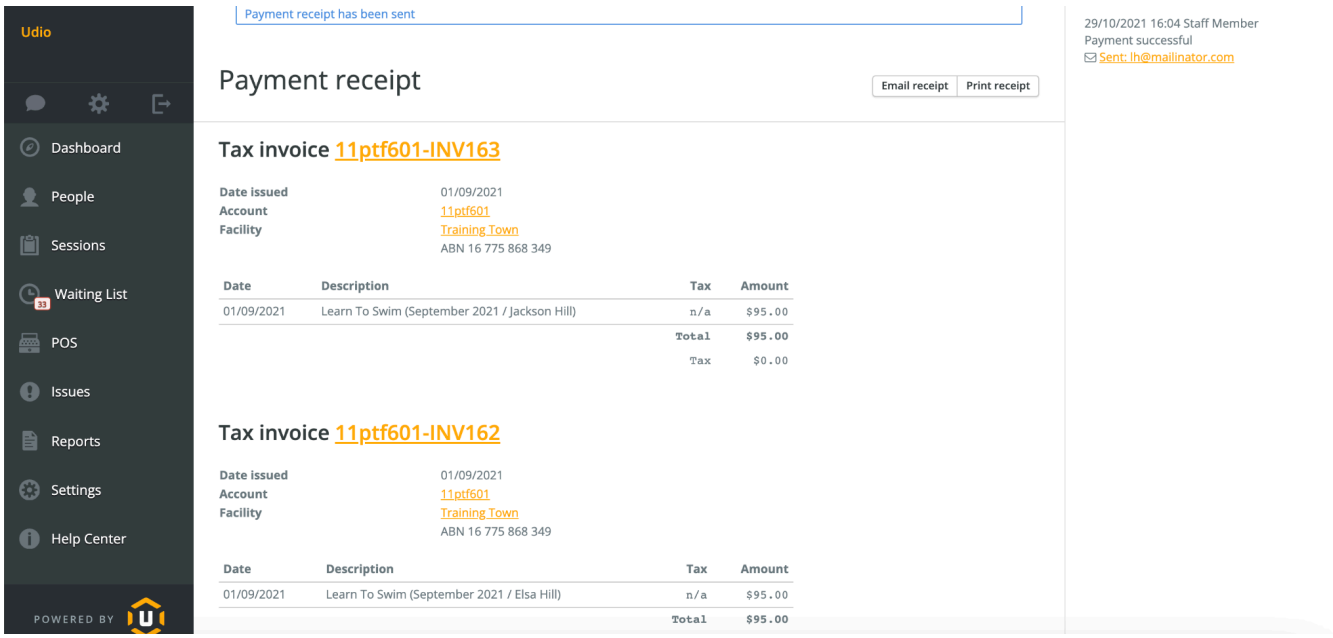
The payment receipt will be emailed directly to the customer.






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

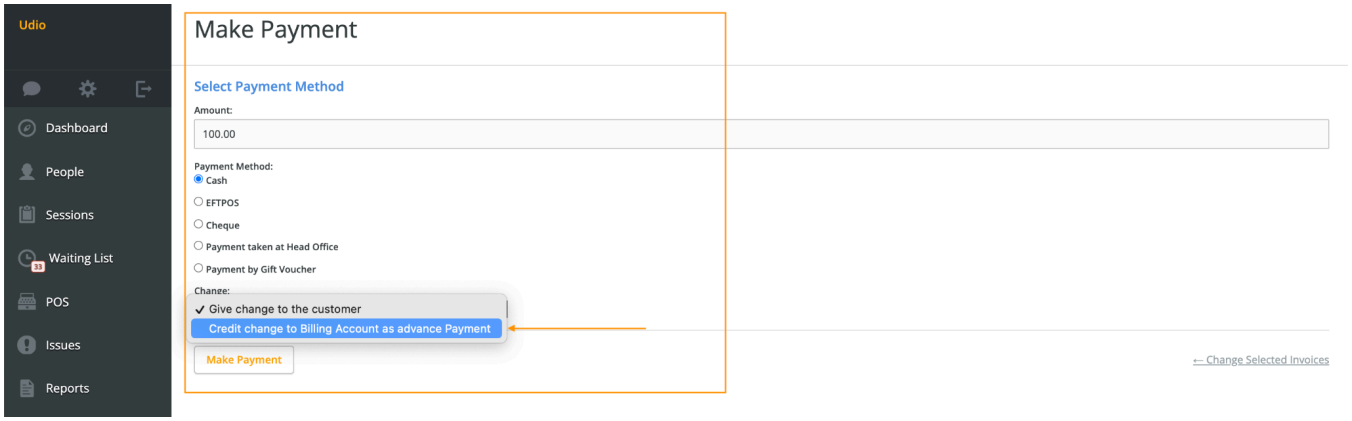

Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Help Center
Payment Has Been Saved
29/10/2021 16:04 AWST
Amount: $190.00
Email Payment receipt
Existing email
Send to these email addresses:
lh@mailinator.com: Elsa Hill, Jackson Hill, Lydia Hill, Norman Hill, Tester Hill
maziewhite@mailinator.com: 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

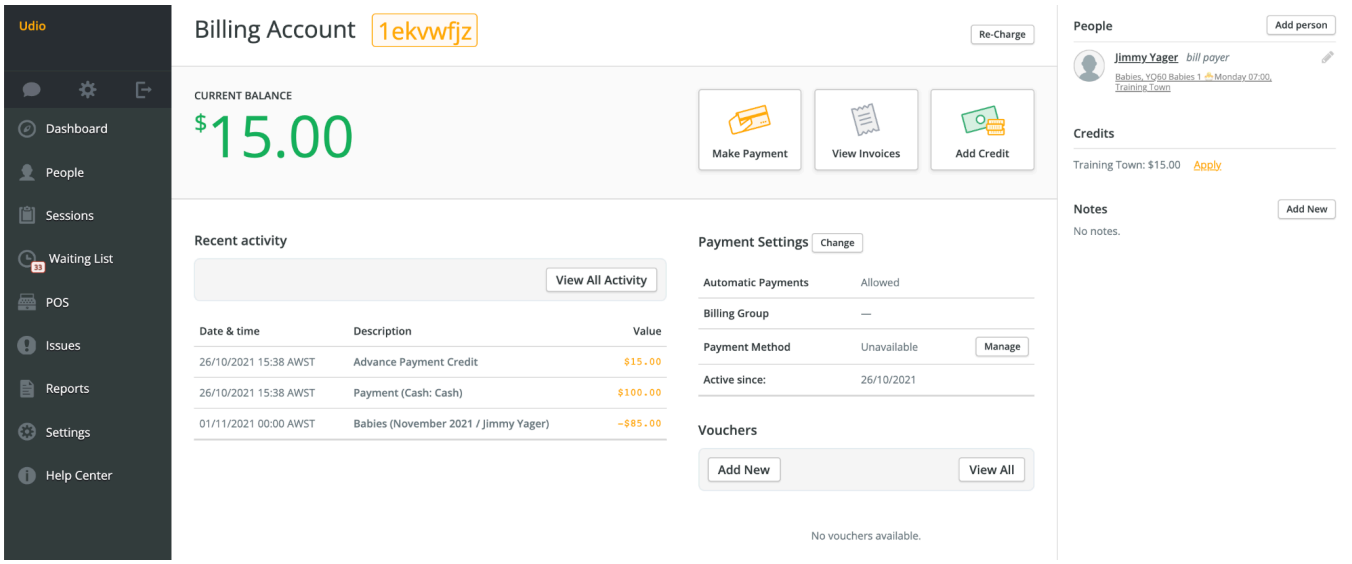

Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Help Center
POWERED BY
Payment receipt has been sent
29/10/2021 16:04 Staff Member
Payment successful
Sent: lh@mailinator.com
Payment receipt
Email receipt
Print receipt
Tax invoice 11ptf601-INV163
Date issued 01/09/2021
Account 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

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



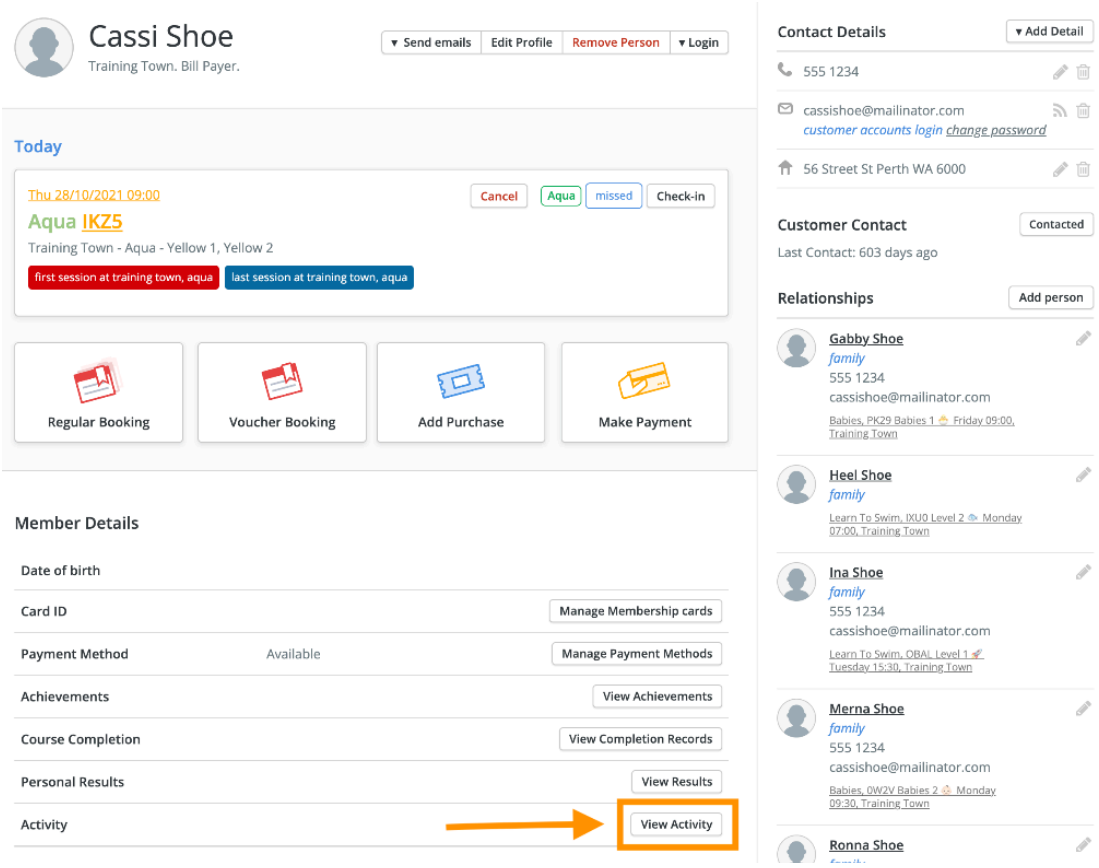


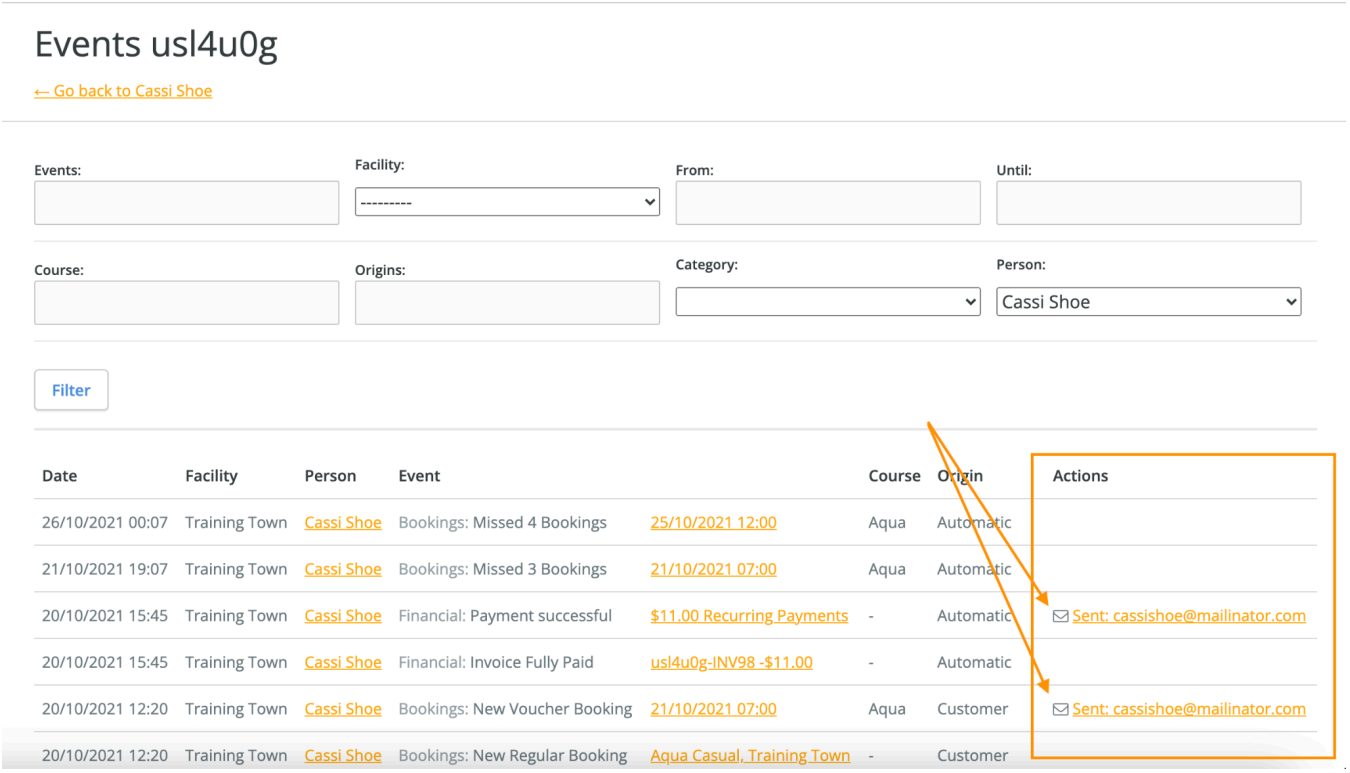
6.4 Resend an email

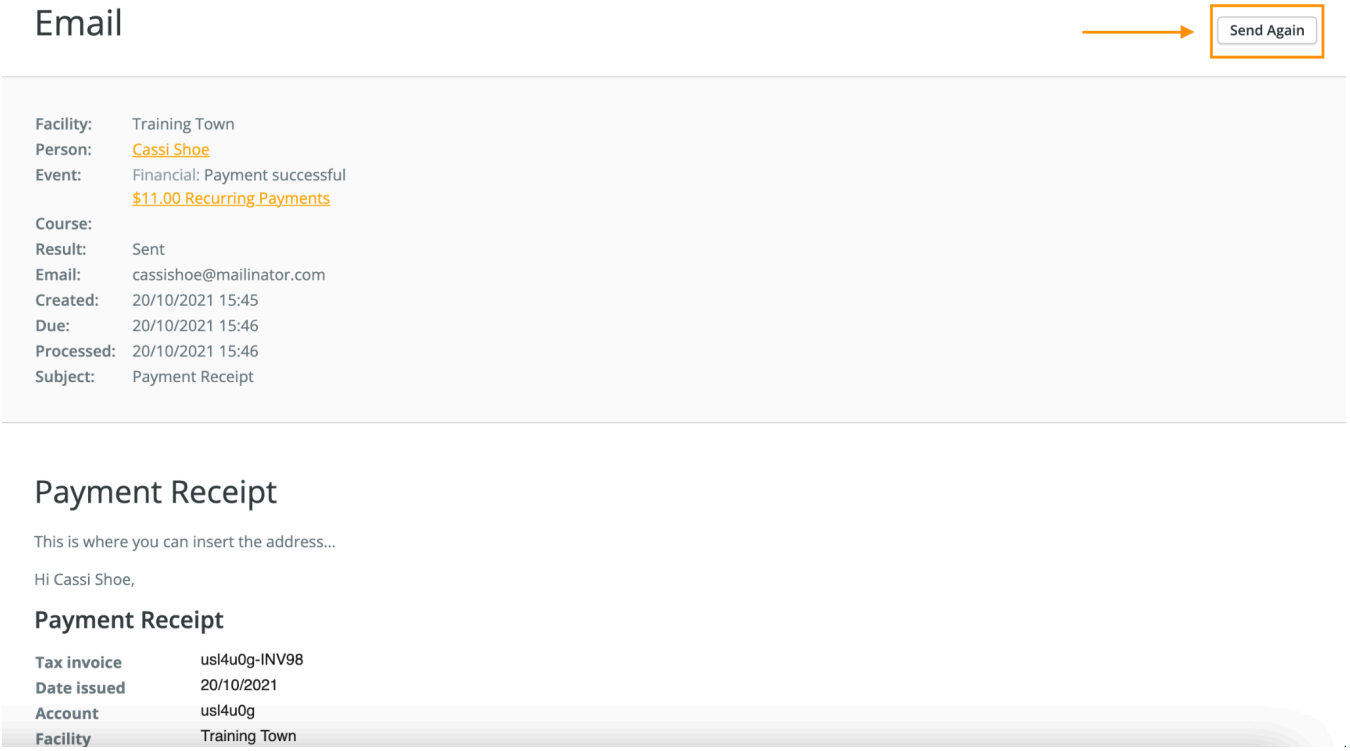
- Go to the people page of the responsible person
- Click ‘view all activity’ under member details

- 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.



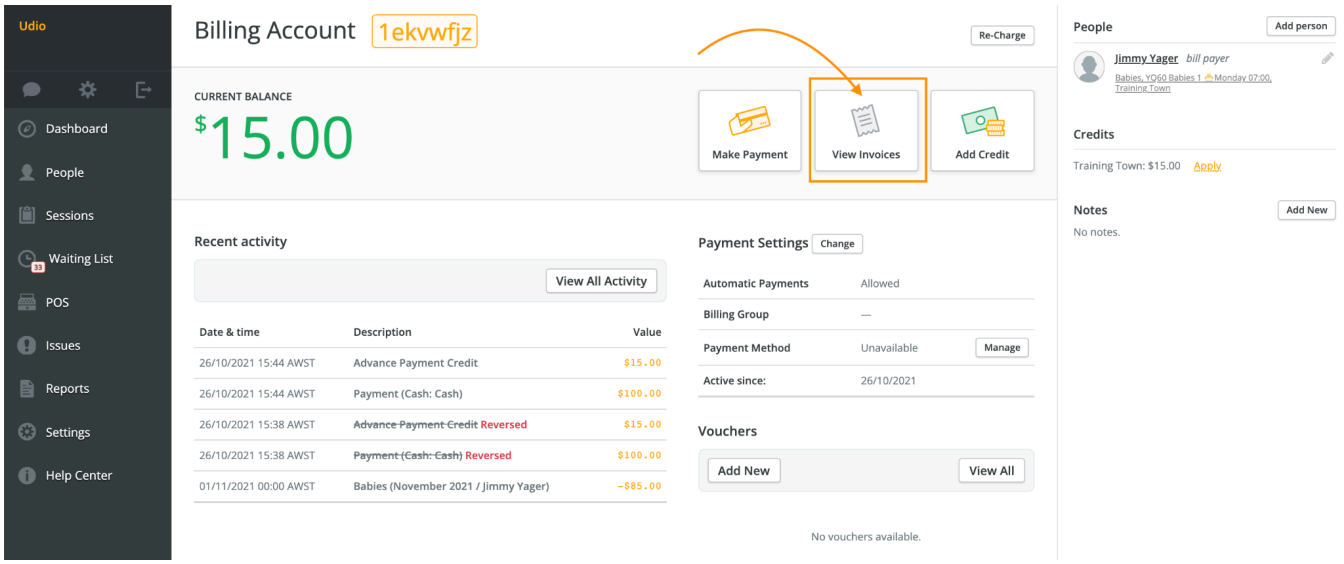


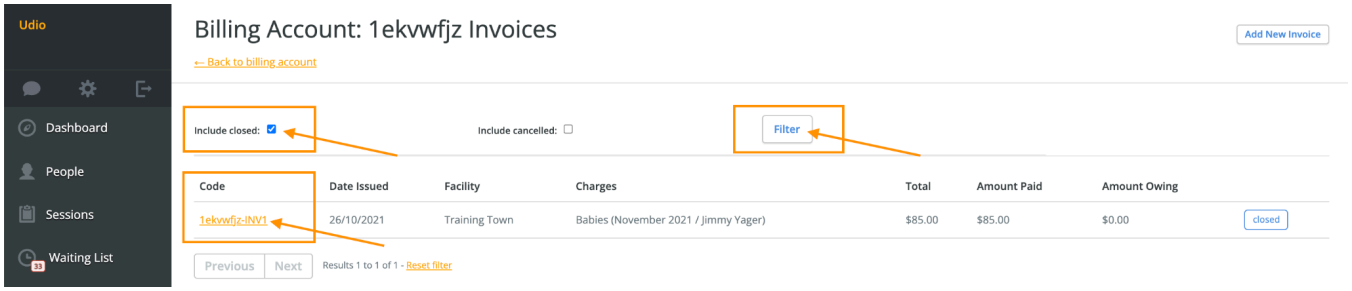


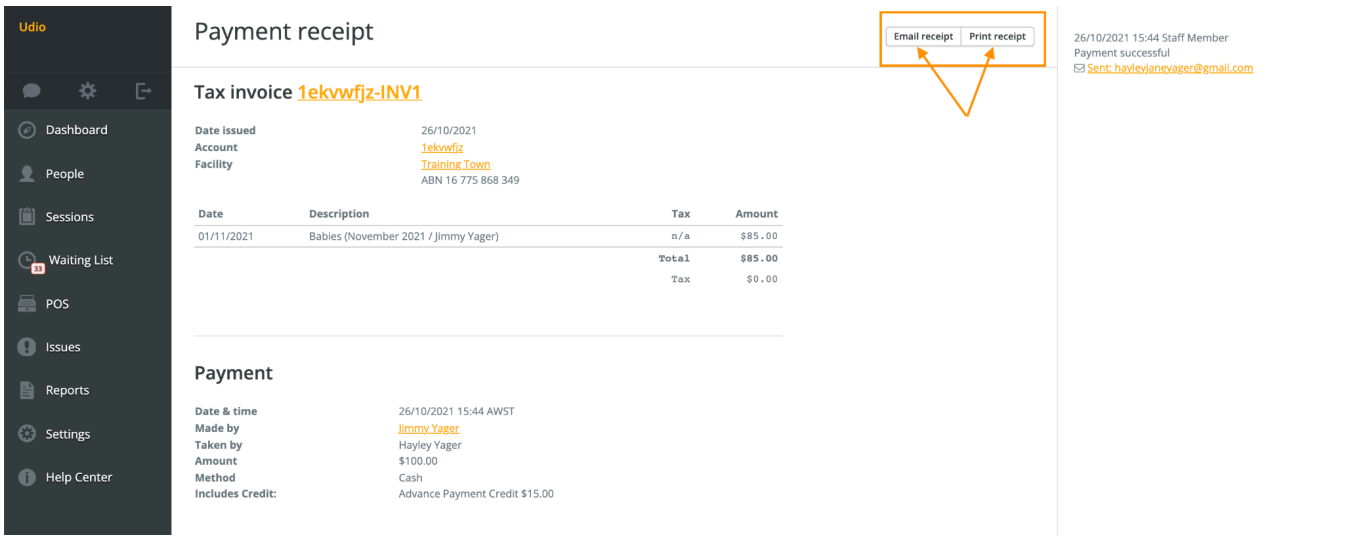
6.5 Print a duplicate receipt

- 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





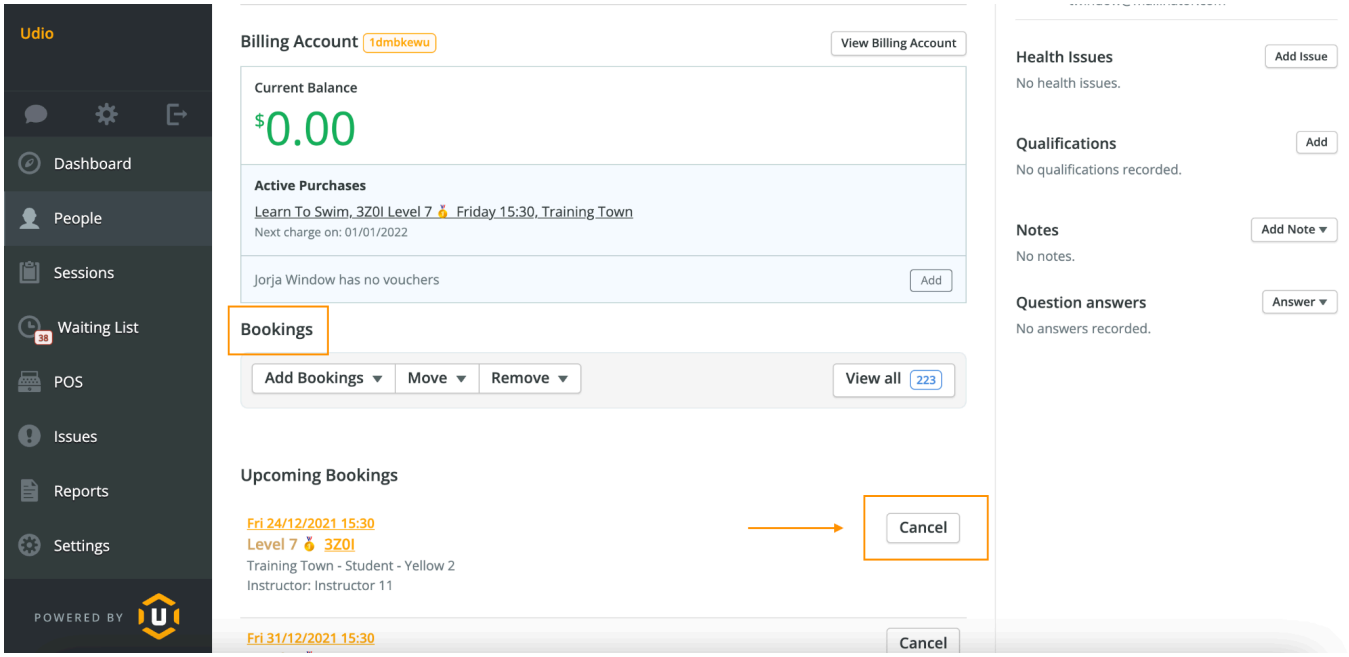


6.6 Cancelling a lesson and issuing make up lesson

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.



6.7 Missed attendance

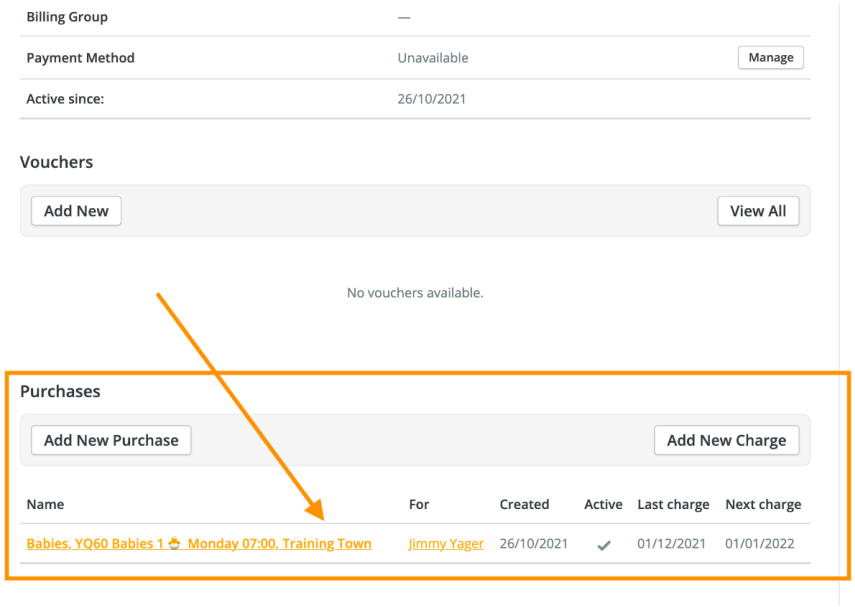
- If a student doesn't attend their lesson and you haven't been notified, they will appear as having missed the lesson; Udio will not assign them a make up

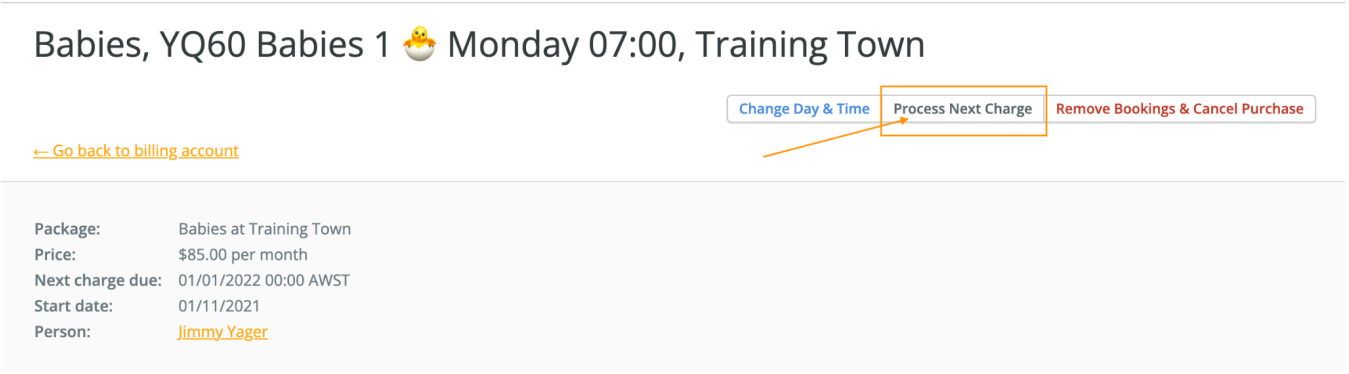
6.8 Payment in advance

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

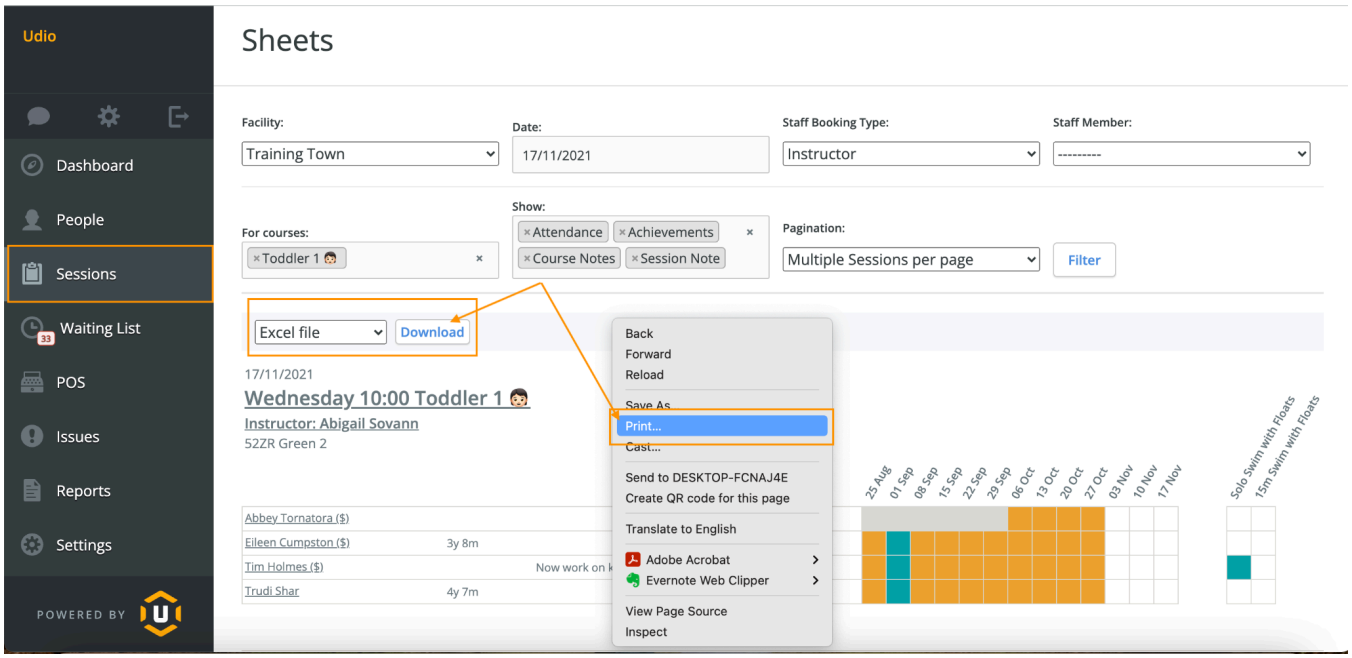


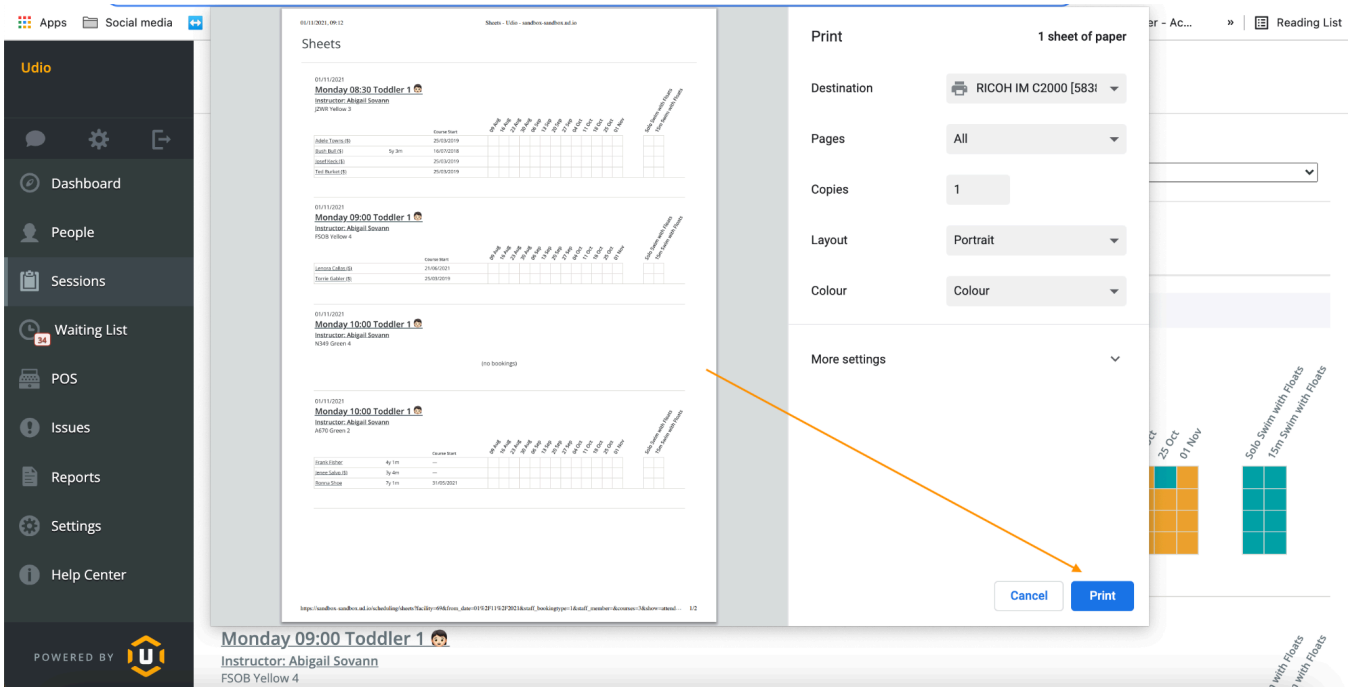


6.9 Printing sheets

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:
    - Courses
    - Attendance
    - Achievements
    - Notes
    - Medical
- Right click on the page and print or download into an excel or .csv file





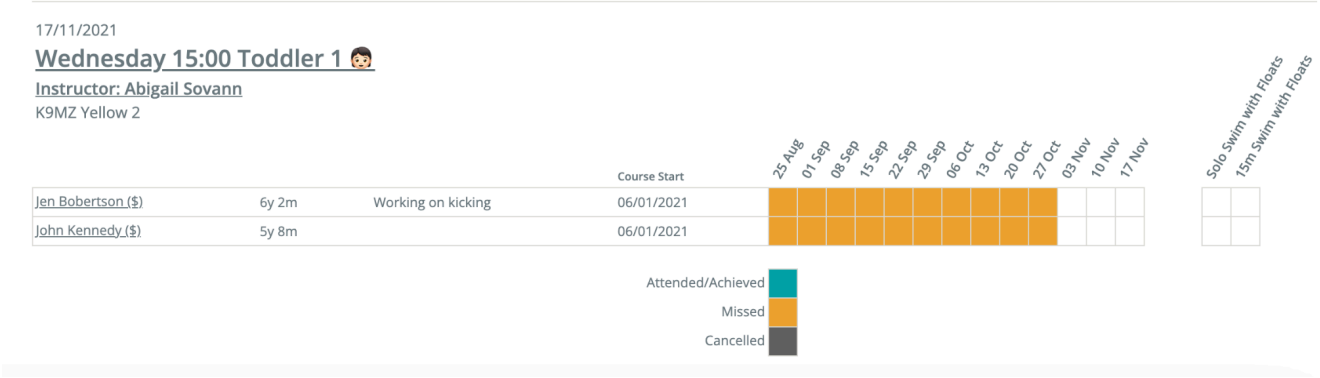
Information on the page

- 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.

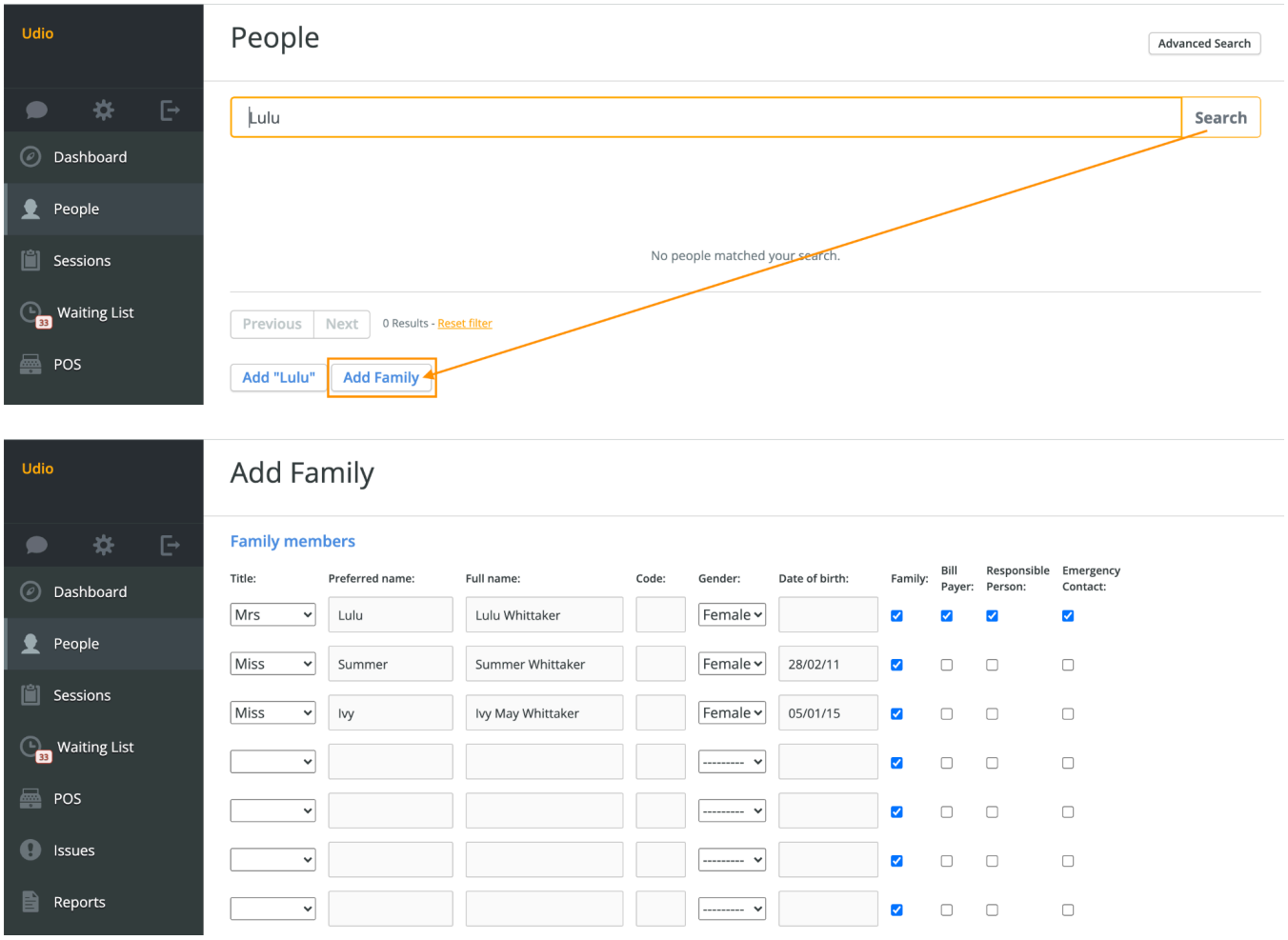
- Filter by date and attendance for all courses will be displayed
- You can view attendance for the previous 12 weeks, as well as see if money is owed which is indicated by a $ symbol next to their name
- The student's name is clickable should you need to navigate to their page for contact information



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

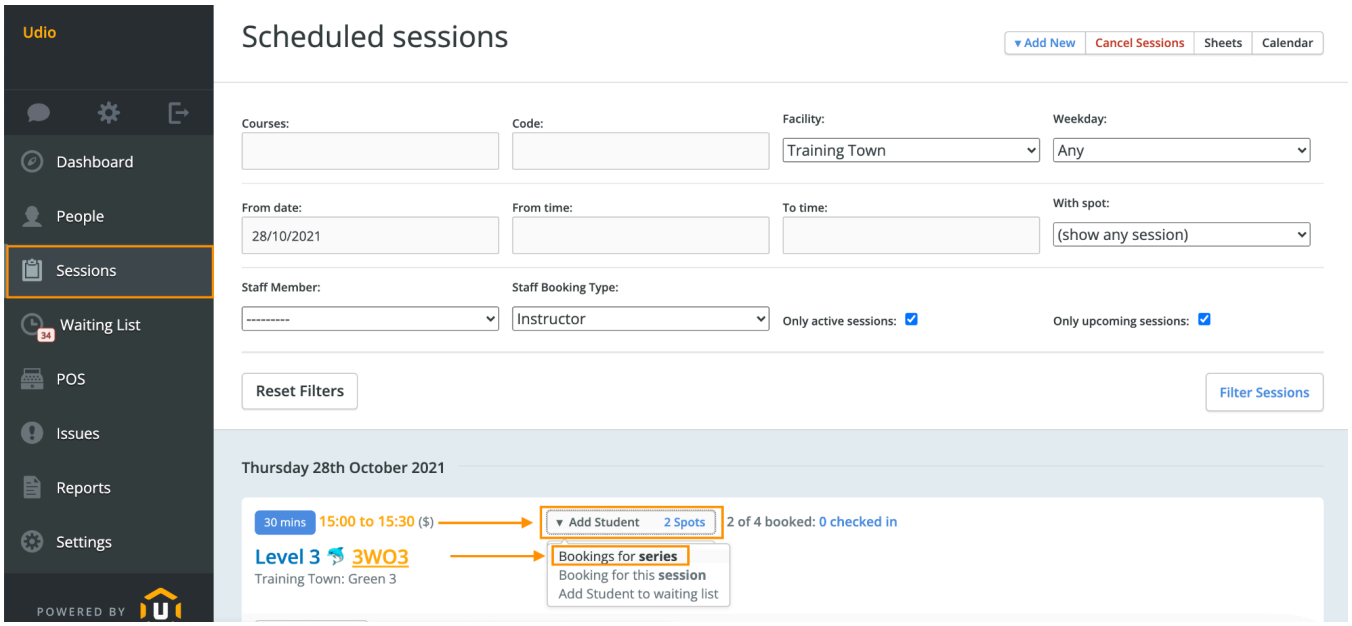


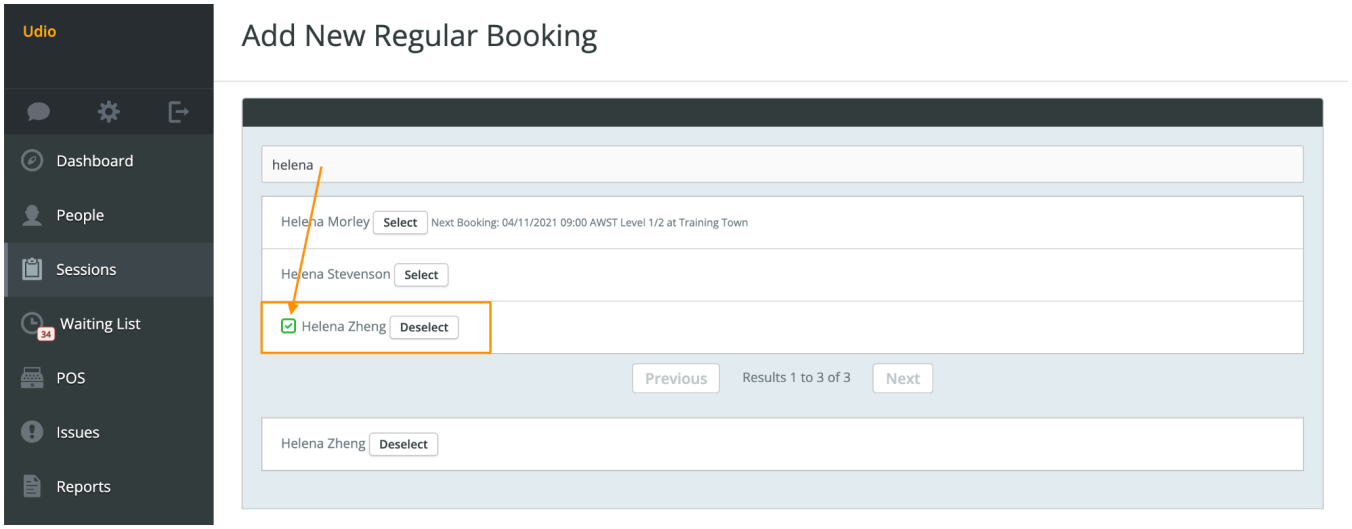
7.2 Booking into a session

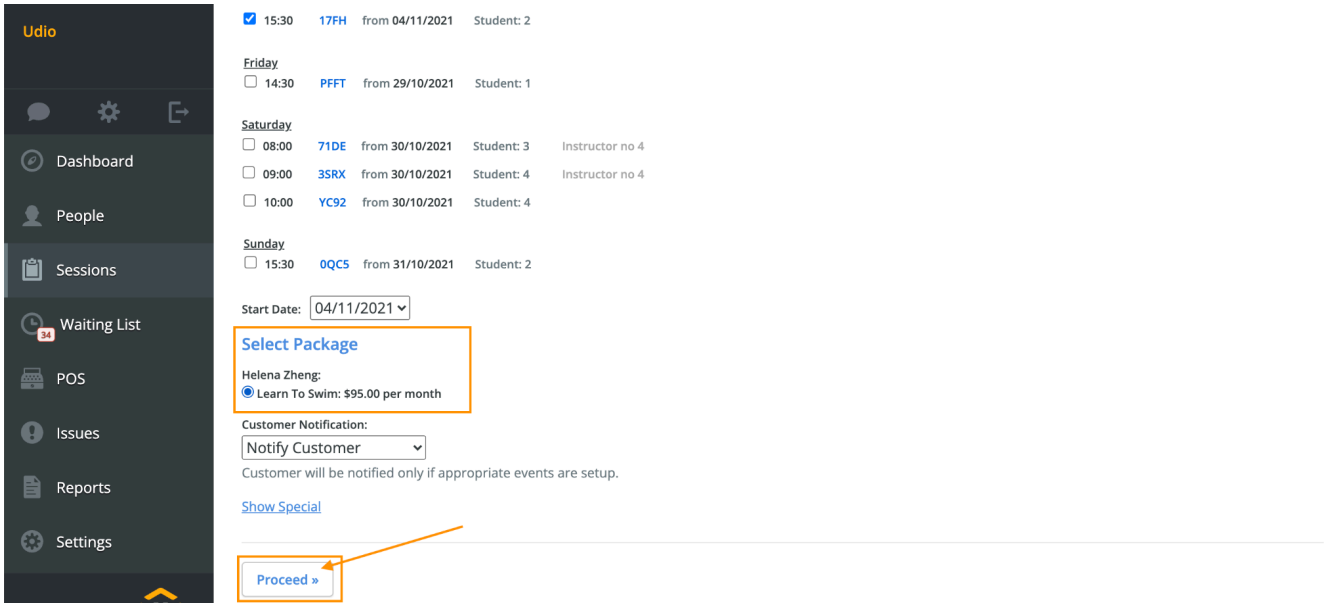
From the 'sessions' section:

- 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





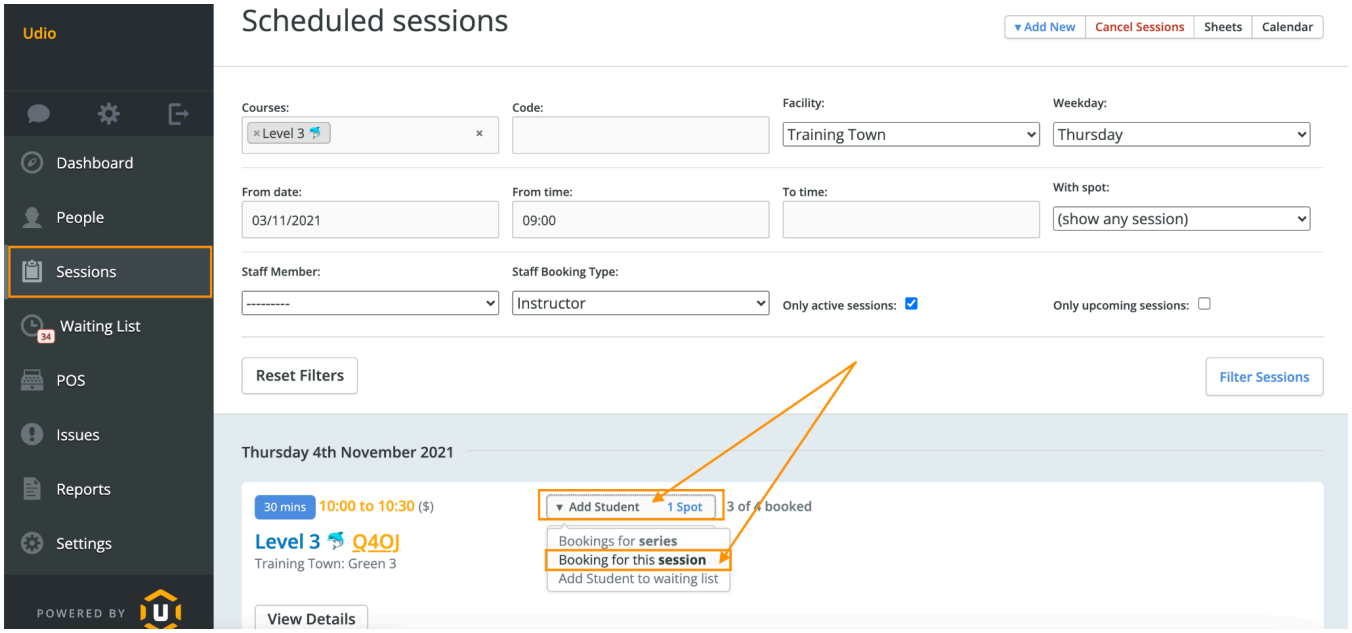


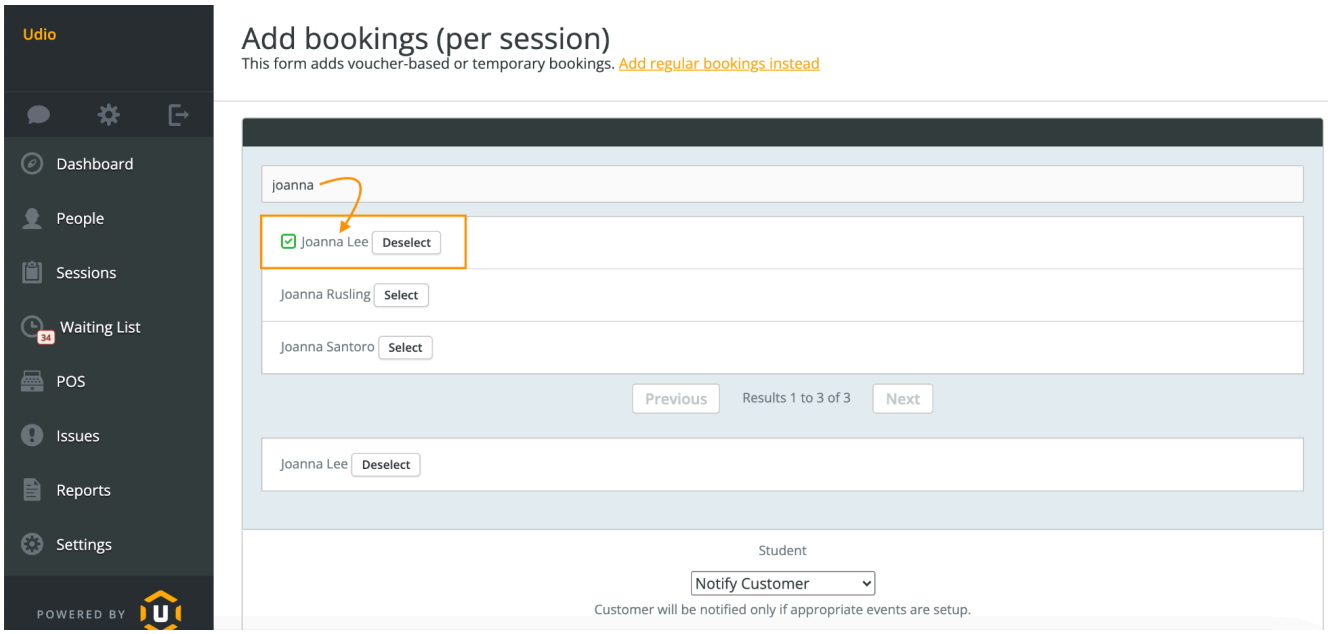
7.3 Booking a make up

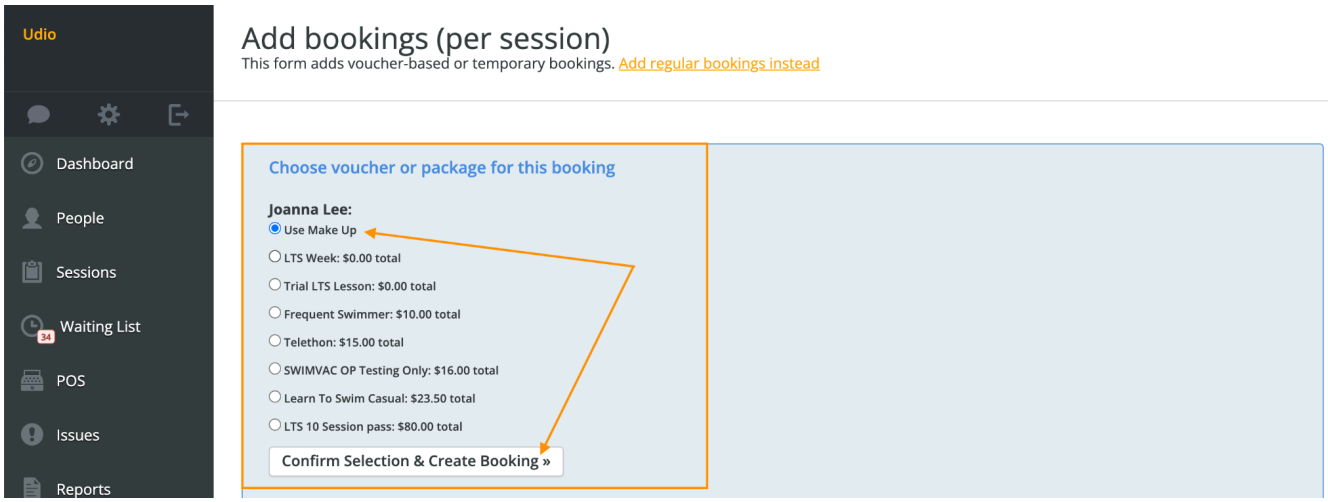
Make up lessons can be booked into a temporary or permanent session with availability. Temporary places are indicated by red text with the number of places available when looking at the sessions page.

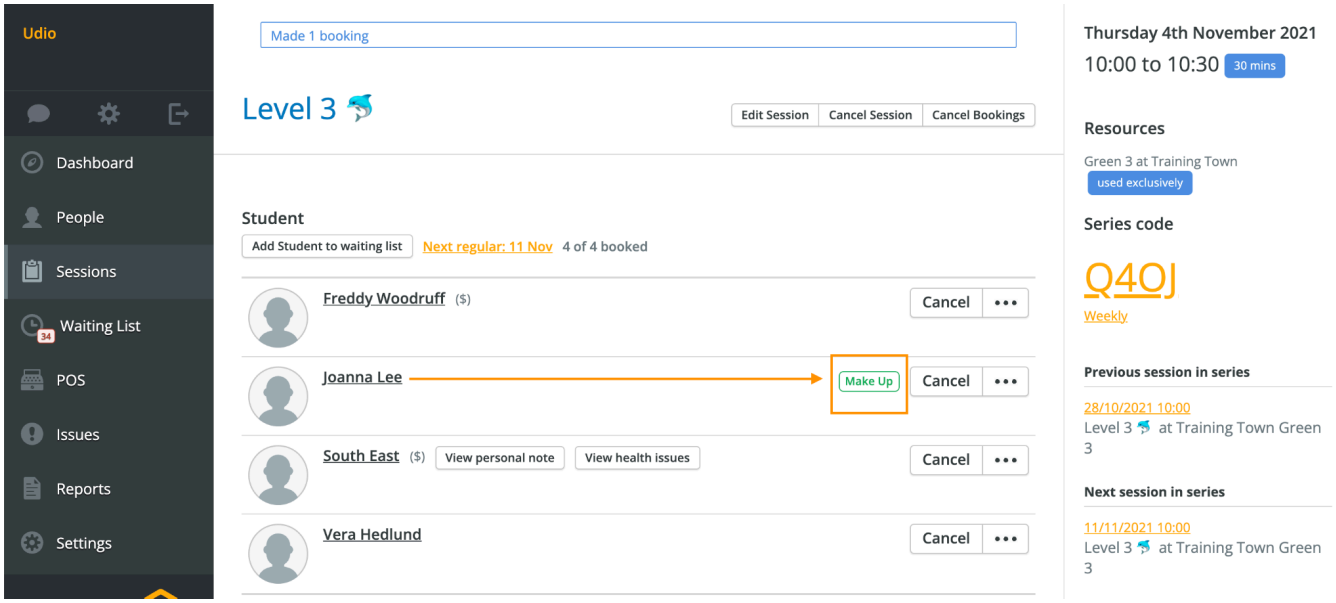
- Click ‘sessions’ and search for the session the customer wants to be booked into
- Click ‘add student’ then ‘booking for this session’ in the drop-down, then ‘find people’
- Search the name of the student and ‘select’
- Check the booking information and click ‘confirm’
- Select the appropriate voucher 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).


Udio
Scheduled sessions
Add New
Cancel Sessions
Sheets
Calendar
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
POWERED BY
Courses:
Level 3
Code:
Facility:
Training Town
Weekday:
Thursday
From date:
03/11/2021
From time:
09:00
To time:
With spot:
(show any session)
Staff Member:
Staff Booking Type:
Instructor
Only active sessions:
Only upcoming sessions:
Reset Filters
Filter Sessions
Thursday 4th November 2021
30 mins
10:00 to 10:30 ($)
Add Student
1 Spot
3 of 4 booked
Level 3
Q4OJ
Training Town: Green 3
Bookings for series
Booking for this session
Add Student to waiting list
View Details


Udio
Add bookings (per session)
This form adds voucher-based or temporary bookings. Add regular bookings instead
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
POWERED BY
joanna
Joanna Lee
Deselect
Joanna Rusling
Select
Joanna Santoro
Select
Previous
Results 1 to 3 of 3
Next
Joanna Lee
Deselect
Student
Notify Customer
Customer will be notified only if appropriate events are setup.

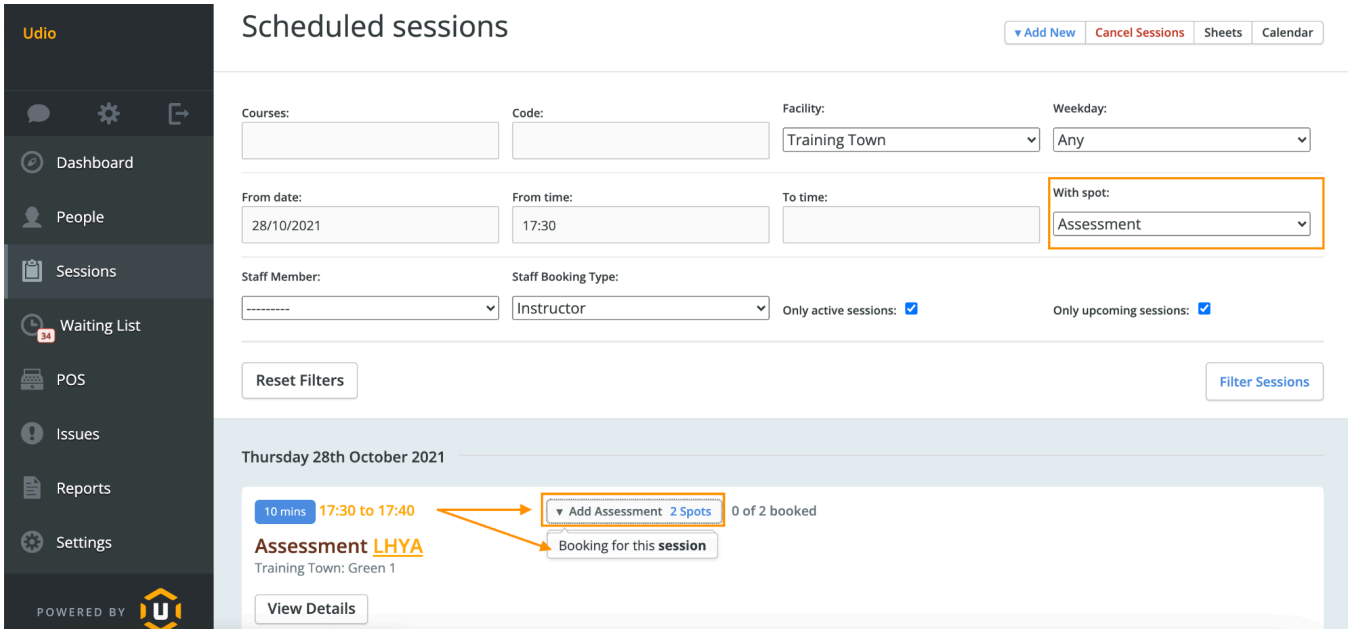

Udio
Add bookings (per session)
This form adds voucher-based or temporary bookings. Add regular bookings instead
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Choose voucher or package for this booking
Joanna Lee:
Use Make Up
LTS Week: $0.00 total
Trial LTS Lesson: $0.00 total
Frequent Swimmer: $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 »



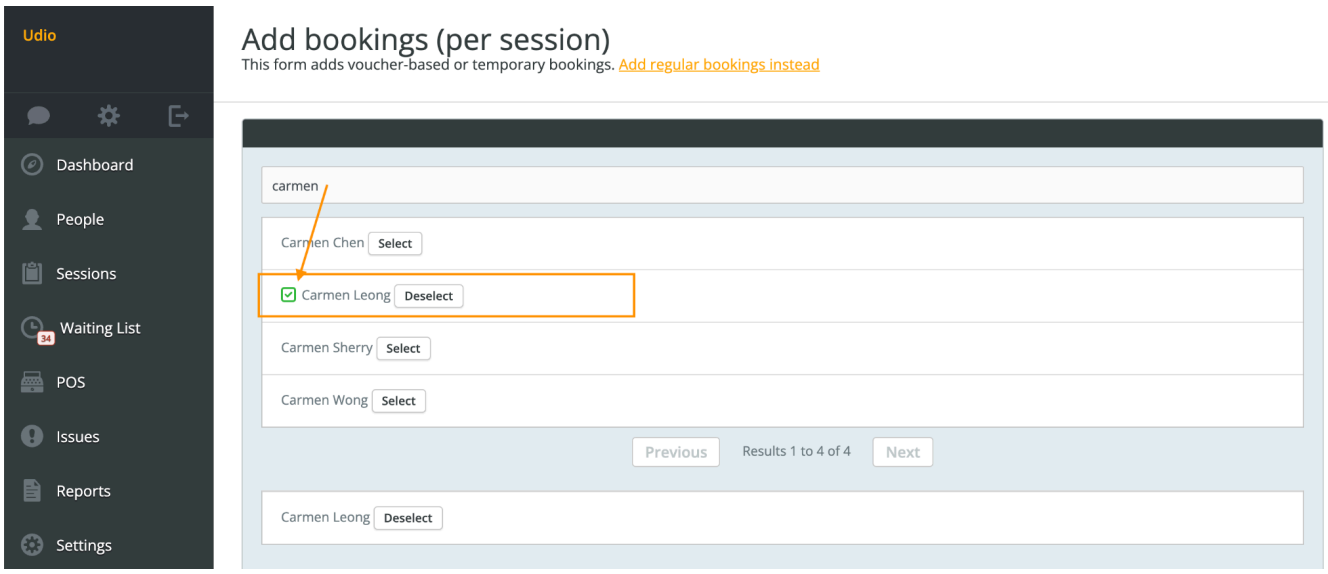
7.4 Booking an assessment

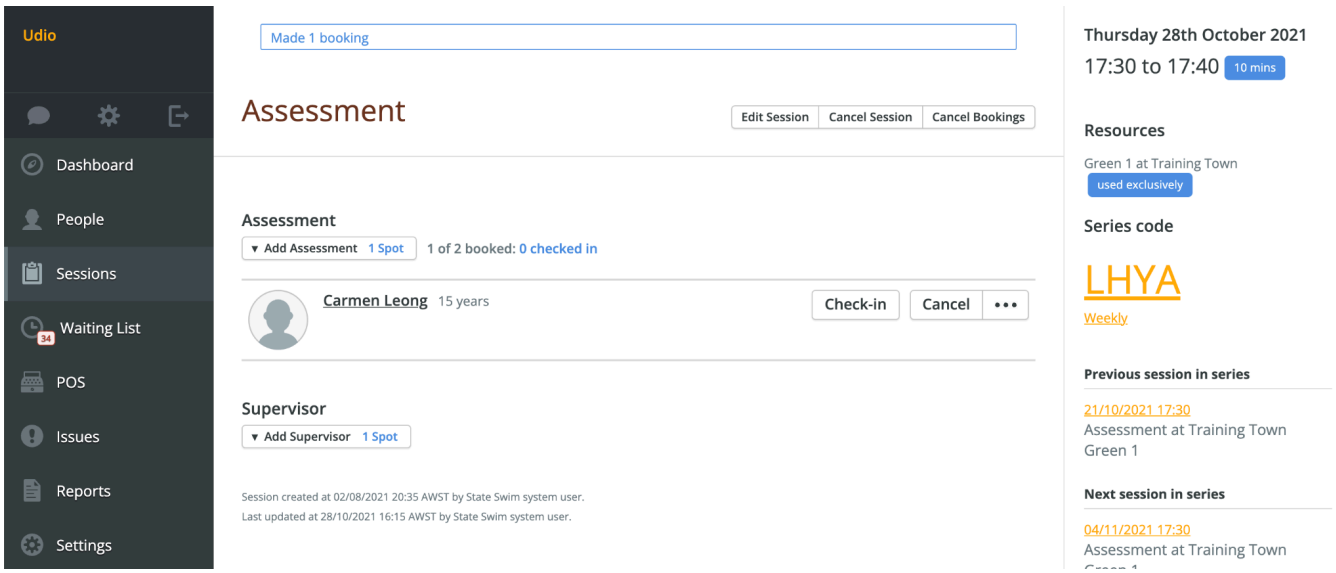
You can make assessment bookings using the same process as booking a lesson. Ensure the customer information is entered into Udio prior to booking an assessment.

- 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
Scheduled sessions
▾ Add New
Cancel Sessions
Sheets
Calendar
Courses:
Code:
Facility:
Training Town
Weekday:
Any
From date:
28/10/2021
From time:
17:30
To time:
With spot:
Assessment
Staff Member:

Staff Booking Type:
Instructor
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
Booking for this session
Assessment LHYA
Training Town: Green 1
View Details
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
POWERED BY

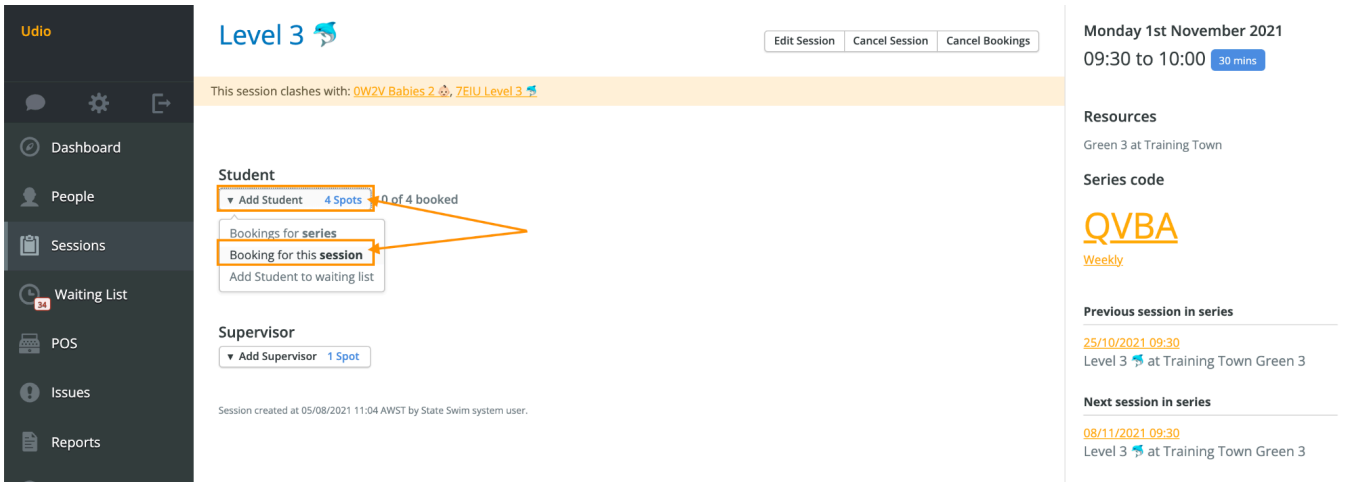

Udio
Add bookings (per session)
This form adds voucher-based or temporary bookings. Add regular bookings instead
carmen
Carmen Chen Select
Carmen Leong Deselect
Carmen Sherry Select
Carmen Wong Select
Previous
Results 1 to 4 of 4
Next
Carmen Leong Deselect
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings

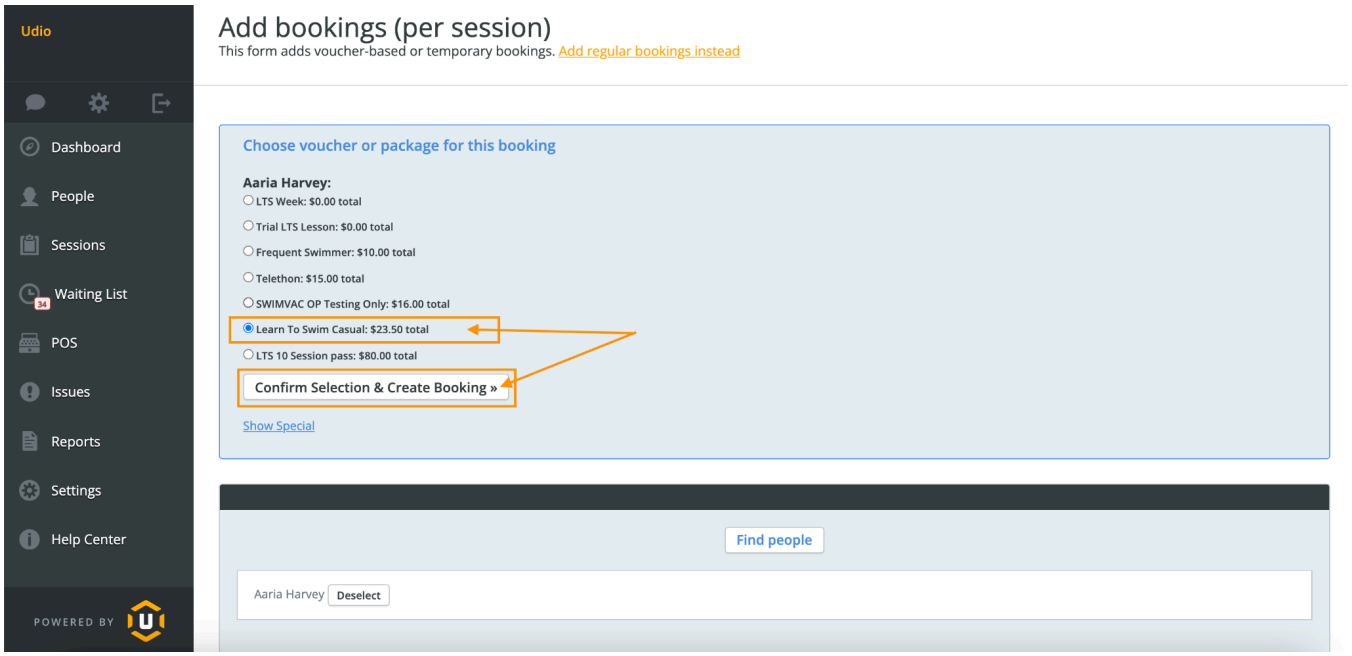

Udio
Made 1 booking
Assessment
Edit Session
Cancel Session
Cancel Bookings
Assessment
▾ Add Assessment 1 Spot
1 of 2 booked: 0 checked in
Carmen Leong 15 years
Check-in
Cancel
Supervisor
▾ Add Supervisor 1 Spot
Session created at 02/08/2021 20:35 AWST by State Swim system user.
Last updated at 28/10/2021 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
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings

7.5 Booking a casual Lesson

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

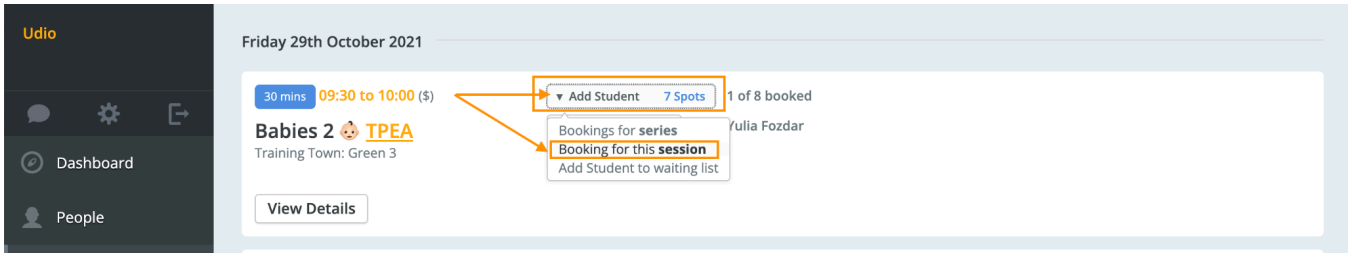
- Go to ‘sessions and pick a session that suits the customer
- Click ‘add student’ then ‘booking for this session’ in the drop down, then ‘find people’
- Search the student's name and select the correct person
- Check the booking details and click ‘confirm’
- Select your casual package then ‘confirm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

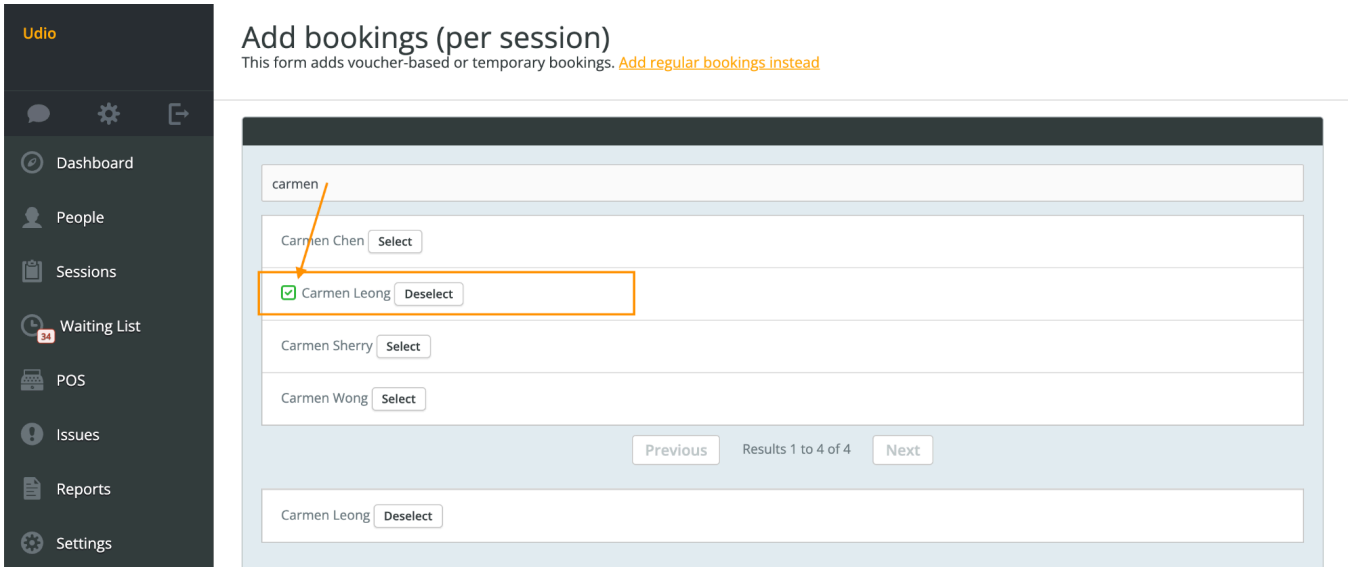


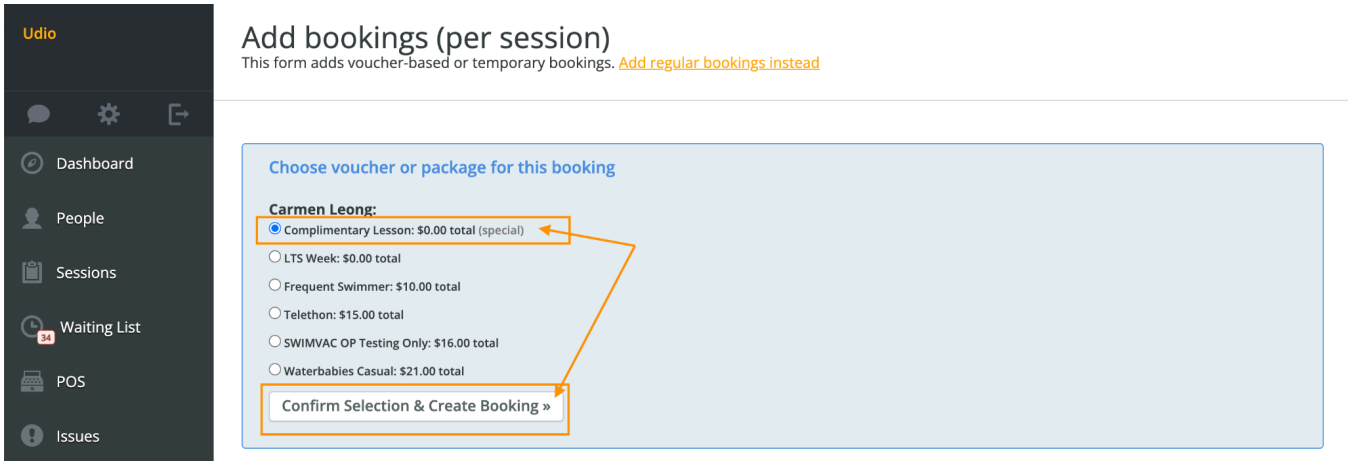


7.6 Booking a complimentary/free trial lesson

- 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’



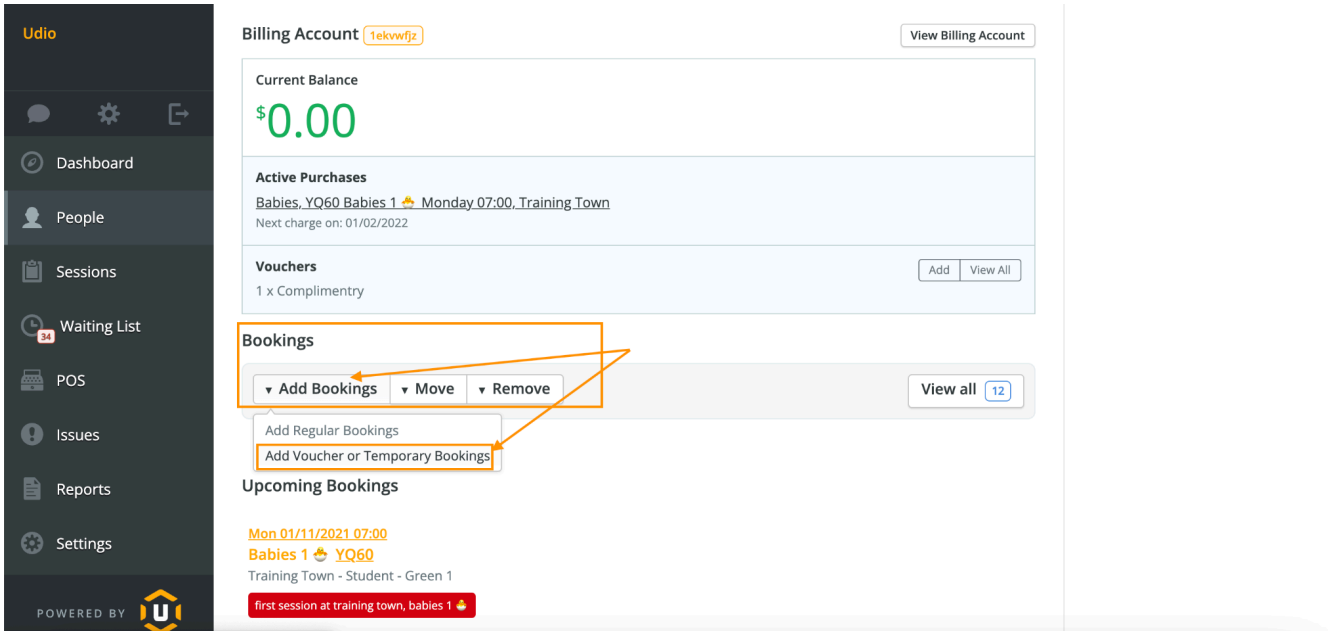


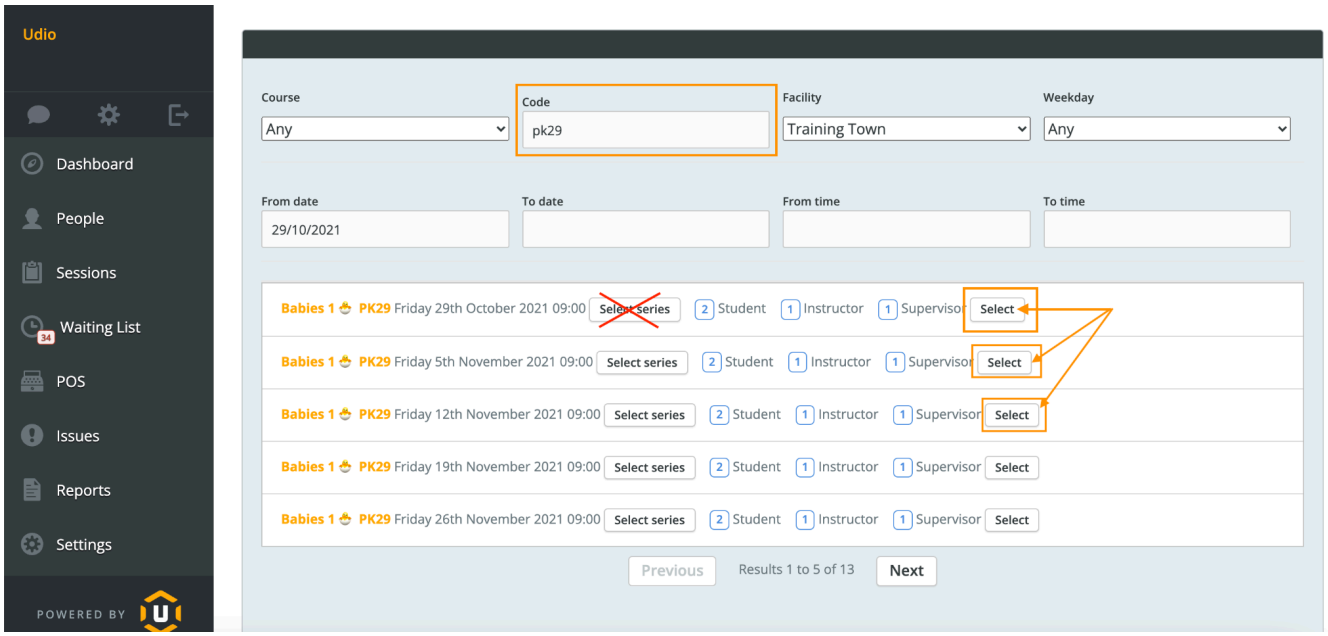


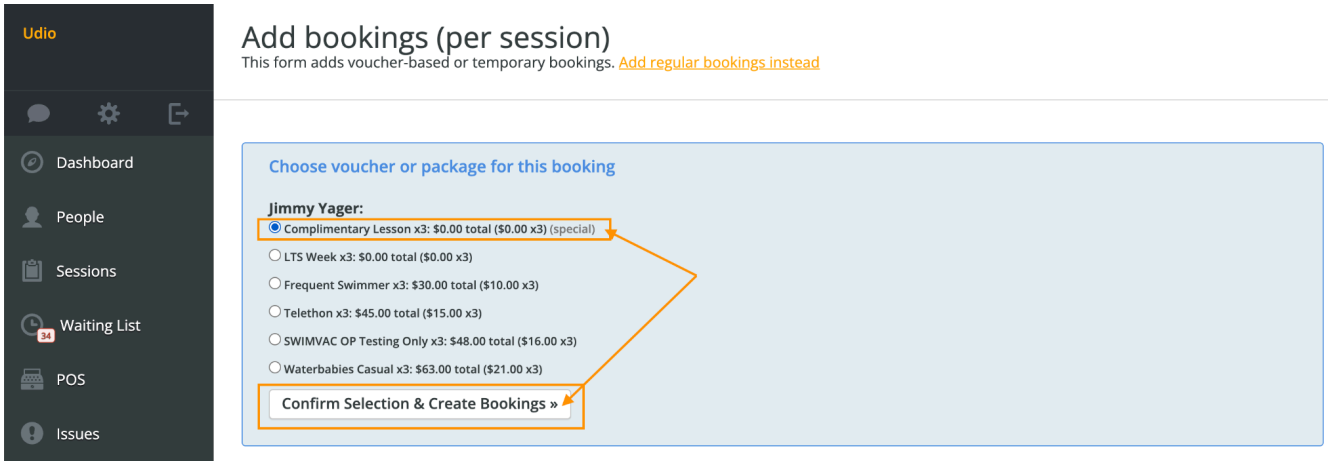
Under ‘sessions’ and on the ‘people’ page, the booking will come up as complimentary so the front desk staff, supervisor and teacher know that this is a complimentary lesson. The booking will also appear as the first session at the school and level.

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’


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
POWERED BY
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
1 x Complimentry
Add
View All
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


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
POWERED BY
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

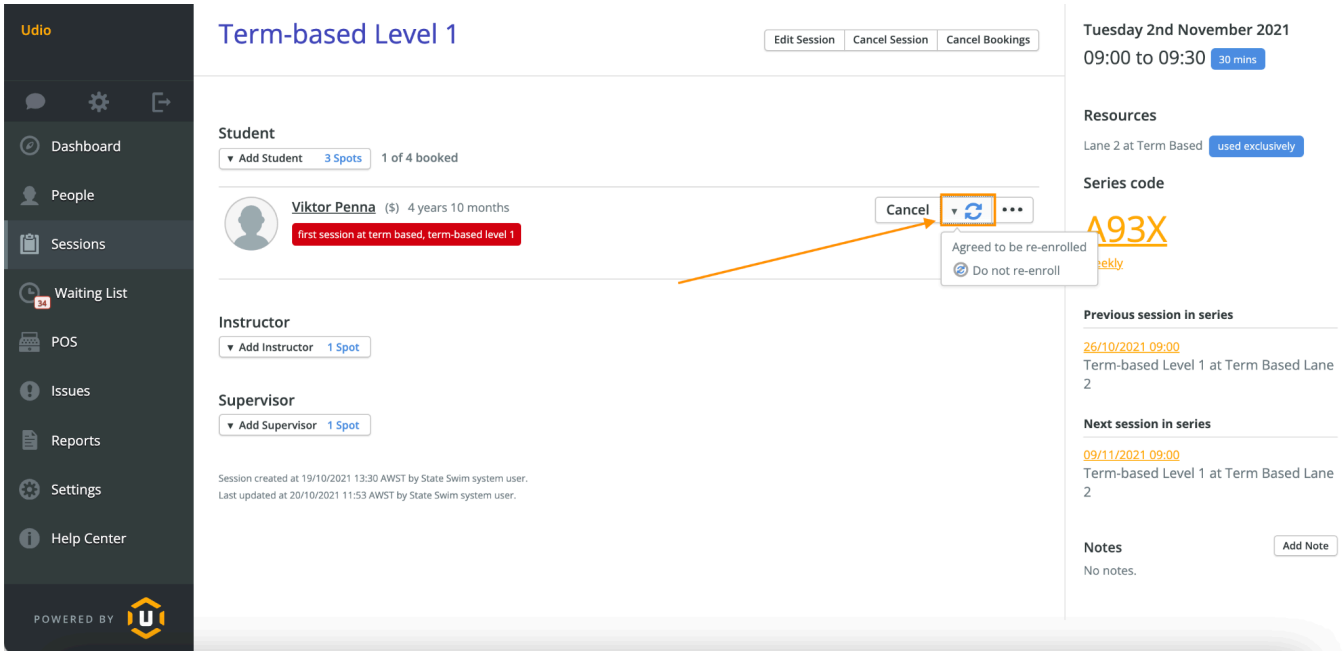

Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Add bookings (per session)
This form adds voucher-based or temporary bookings. Add regular bookings instead
Choose voucher or package for this booking
Jimmy Yager:
Complimentary Lesson x3: $0.00 total ($0.00 x3) (special)
LTS Week x3: $0.00 total ($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’

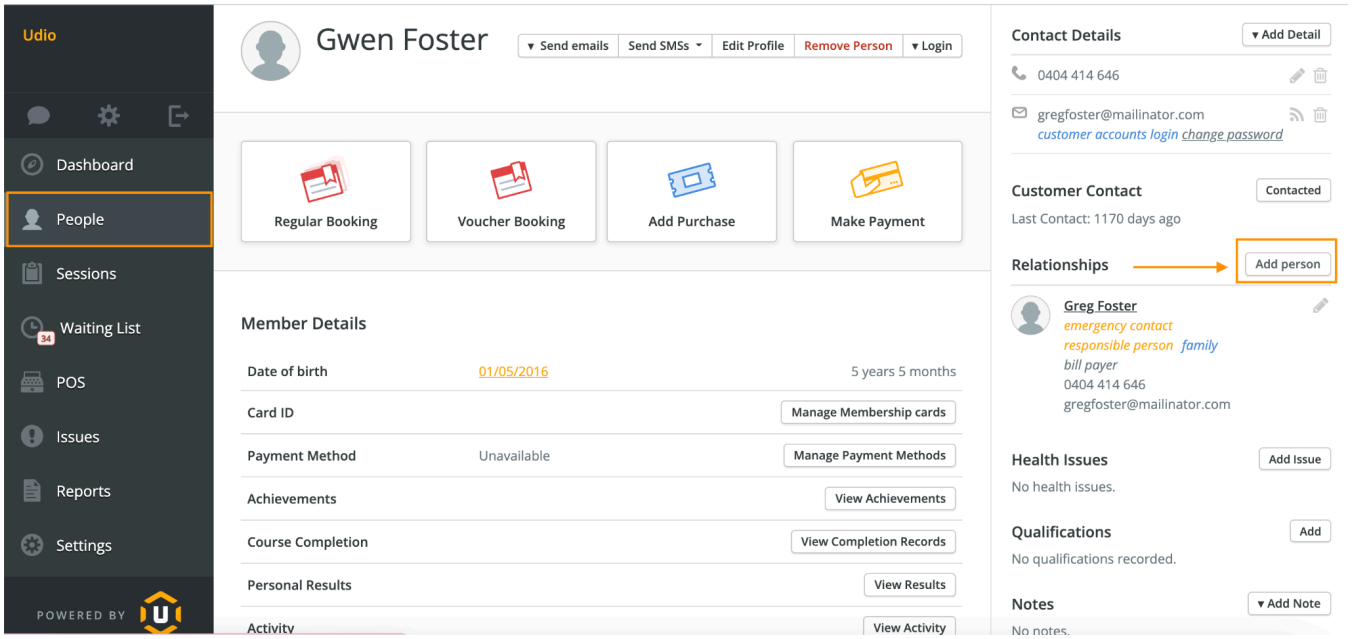
Note: Udio defaults to re-enrol

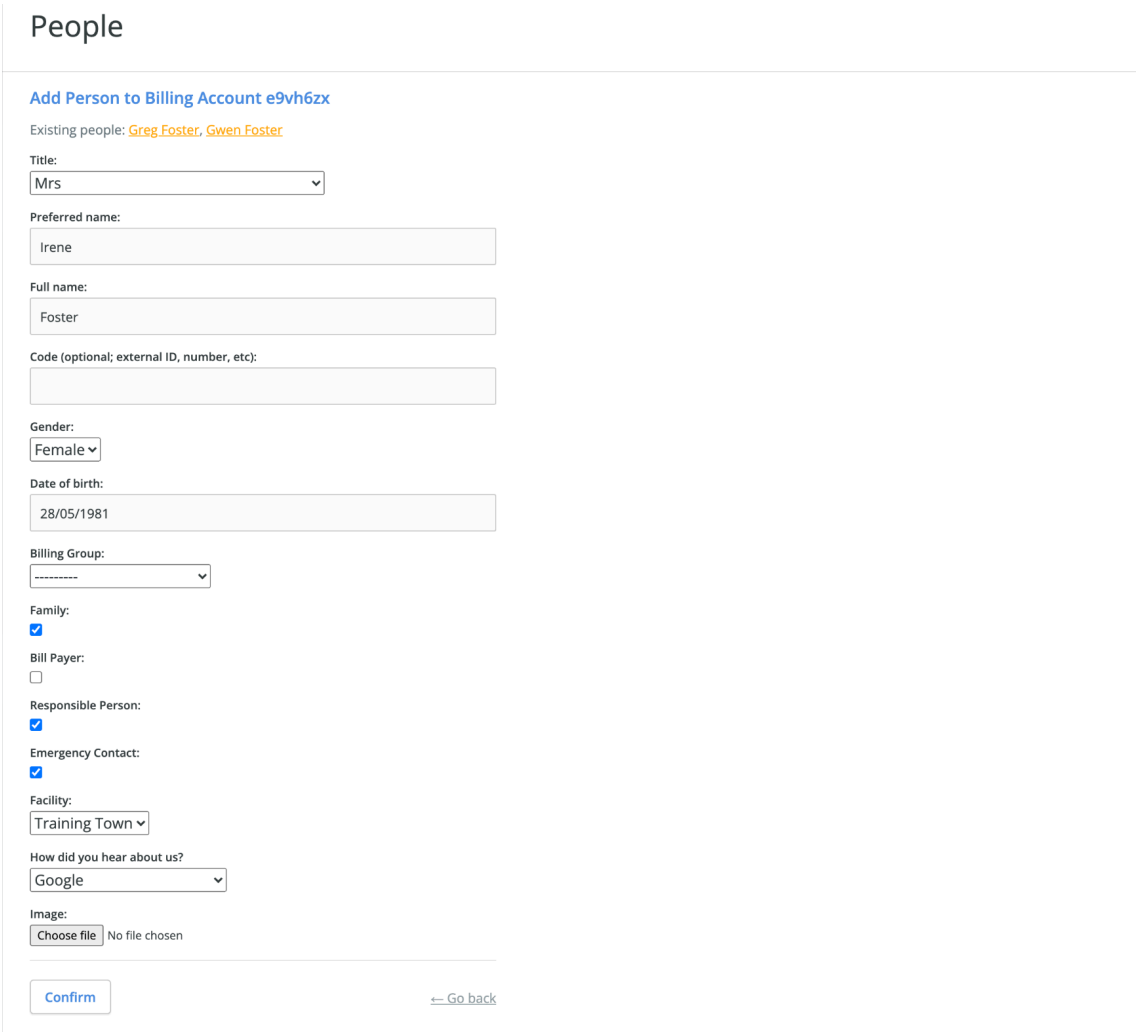


7.9 Adding a person to an existing family

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
34
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 birth
01/05/2016
5 years 5 months
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
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.

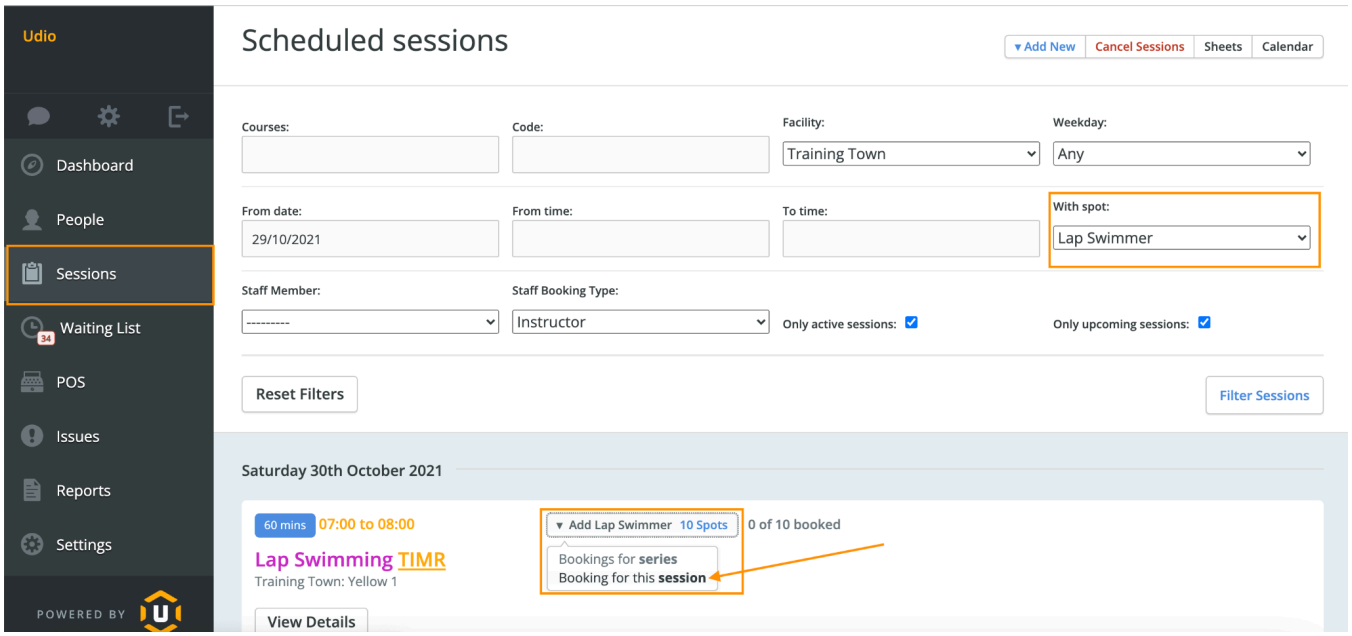

People
Add Person to Billing Account e9vh6zx
Existing people: Greg Foster, Gwen Foster
Title:
Mrs
Preferred name:
Irene
Full name:
Foster
Code (optional; external ID, number, etc):
Gender:
Female
Date of birth:
28/05/1981
Billing Group:

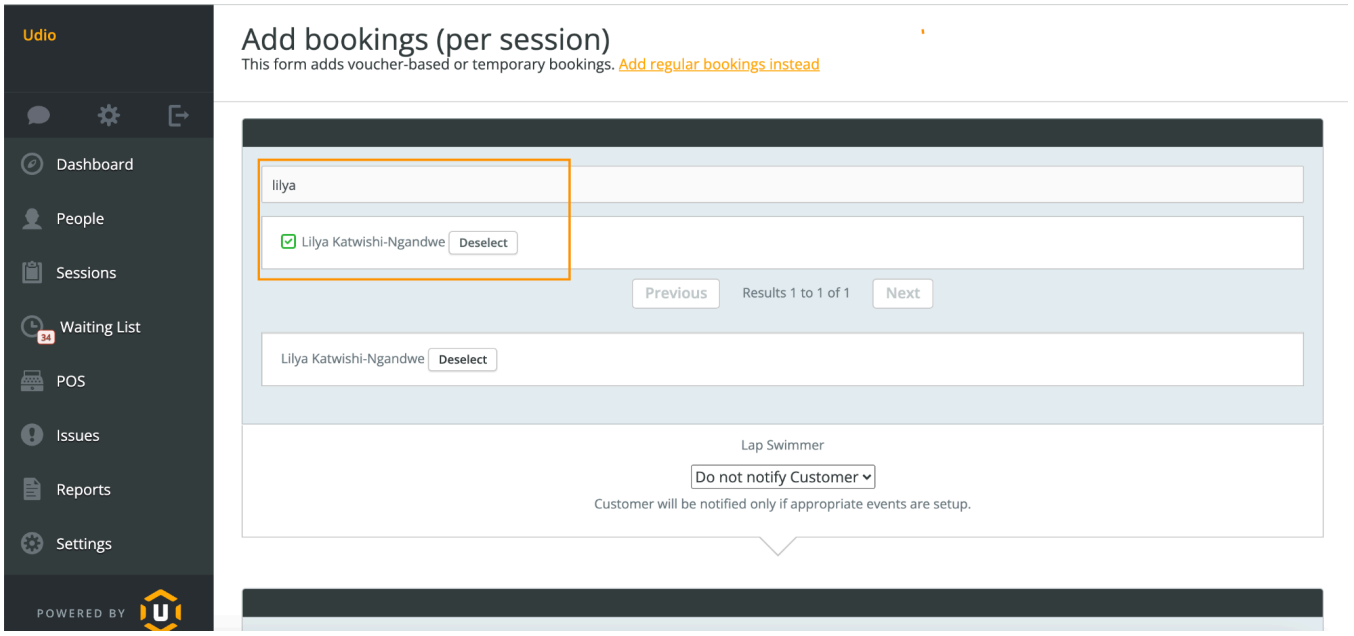
Family:
Bill Payer:
Responsible Person:
Emergency Contact:
Facility:
Training Town
How did you hear about us?
Google
Image:
Choose file
No file chosen
Confirm
← Go back

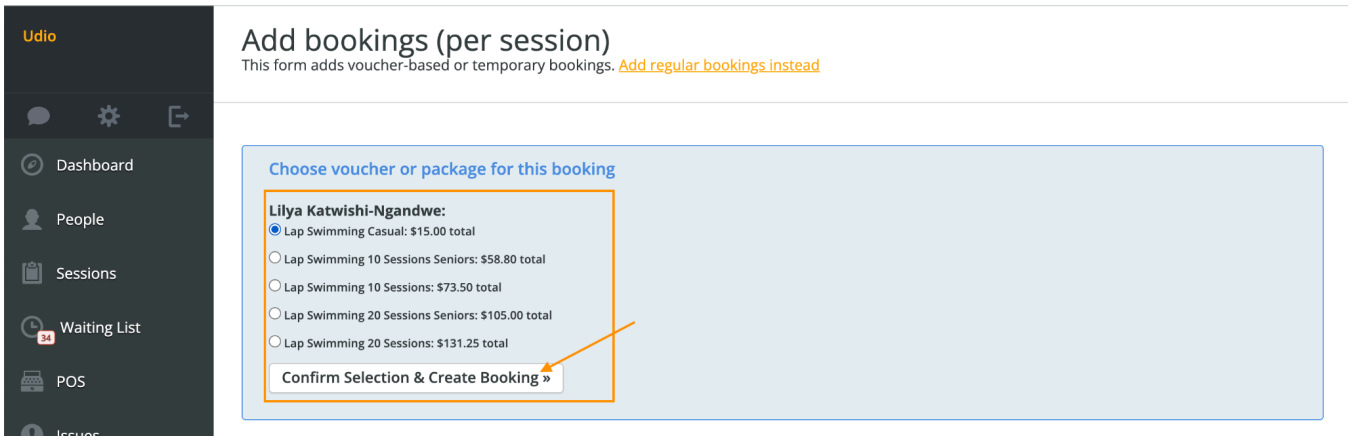
7.10 Purchasing session vouchers

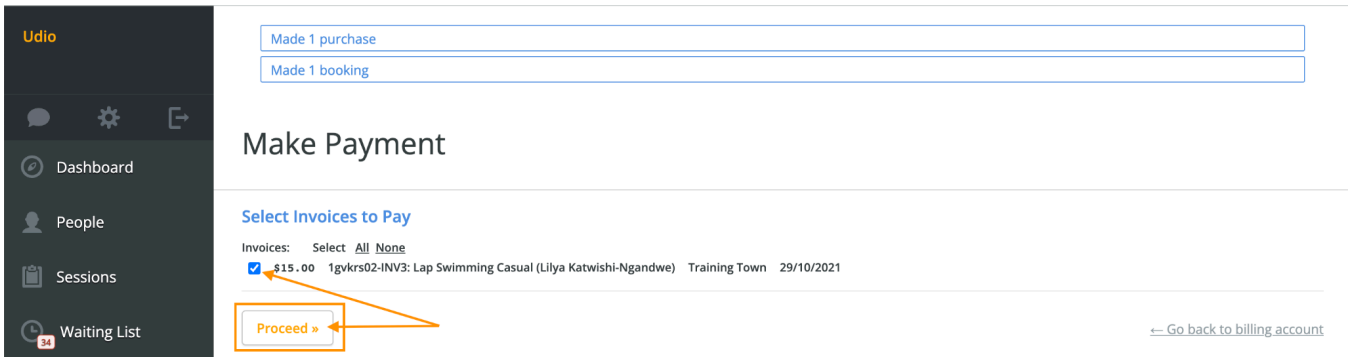
Whilst a voucher-based session is not booked into a session, the customer must purchase a session pass to attend.

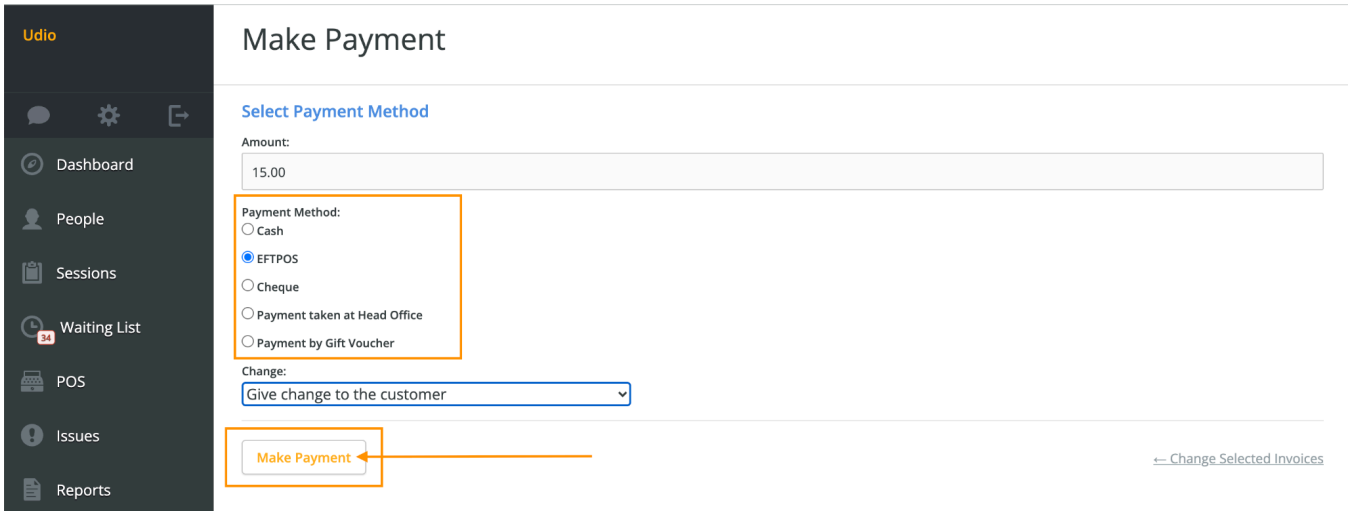
- If they are a new customer, you'll need to enter their details into Udio
- Locate the session to be booked into
- Click on 'add lap swimmer' or 'add aqua' then select 'booking for this session'
- Click 'find people' then type in the customer's name and 'select'
- Confirm the booking information
- Select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




Udio
Add bookings (per session)
This form adds voucher-based or temporary bookings. Add regular bookings instead
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
POWERED BY
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
Add bookings (per session)
This form adds voucher-based or temporary bookings. Add regular bookings instead
Dashboard
People
Sessions
Waiting List
POS
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 »

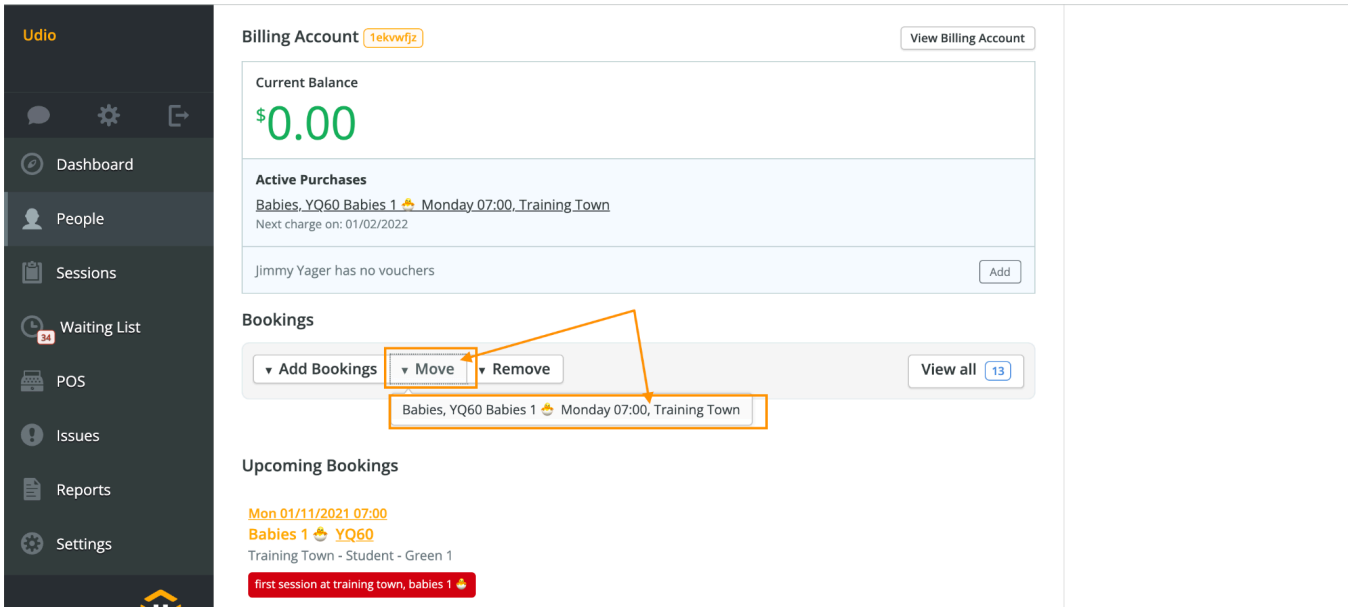

Udio
Made 1 purchase
Made 1 booking
Dashboard
People
Sessions
Waiting List
Make Payment
Select Invoices to Pay
Invoices: Select All None
$15.00 1gvkrs02-INV3: Lap Swimming Casual (Lilya Katwishi-Ngandwe) Training Town 29/10/2021
Proceed »
← Go back to billing account

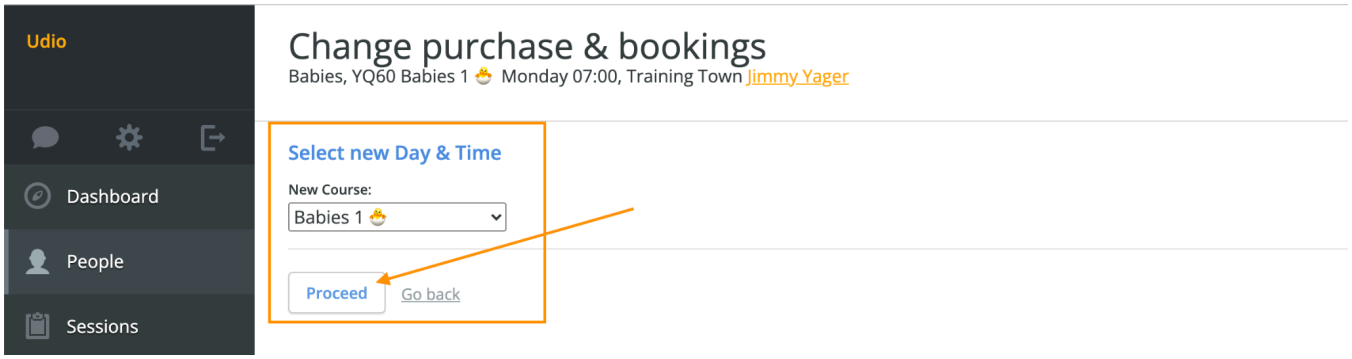


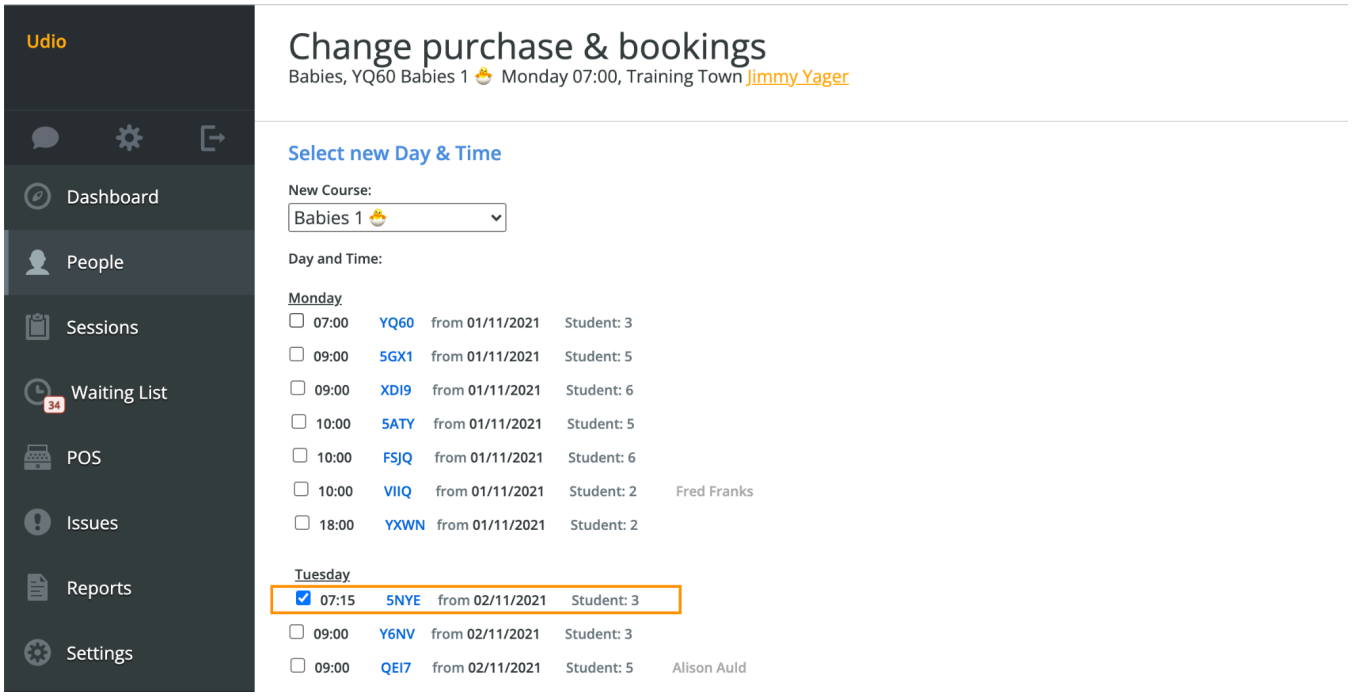
7.11 Moving a booking time and day (same course)

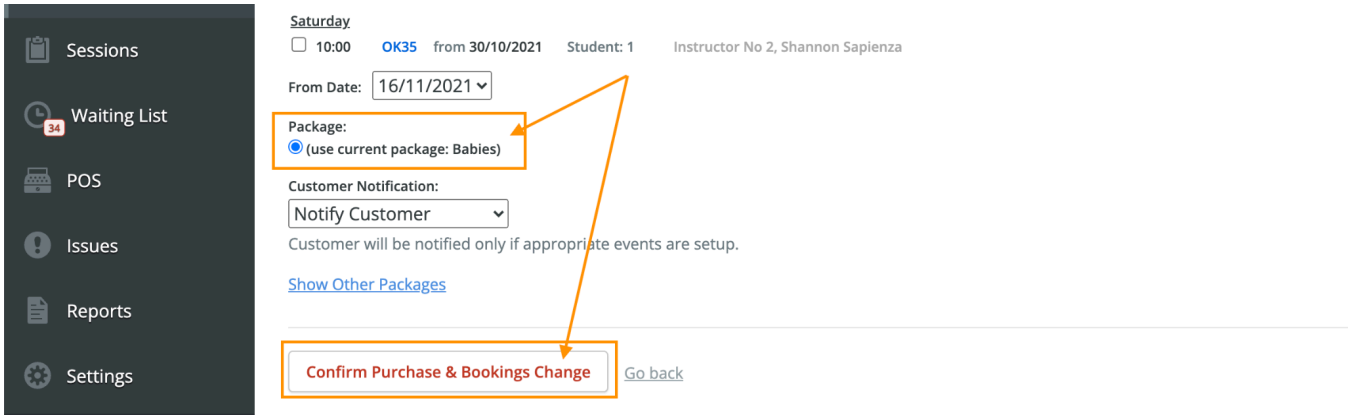
- Go to the 'people' page of the person you are moving
- Under 'bookings' click on 'move' and select course
- If the same course, leave and click 'proceed'
- Tick the new day
- Choose the 'from date' and click 'proceed'
- Click '(use current package:'), review the booking and 'confirm purchase & bookings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

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


Udio
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
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
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings


Udio
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
Dashboard
People
Sessions

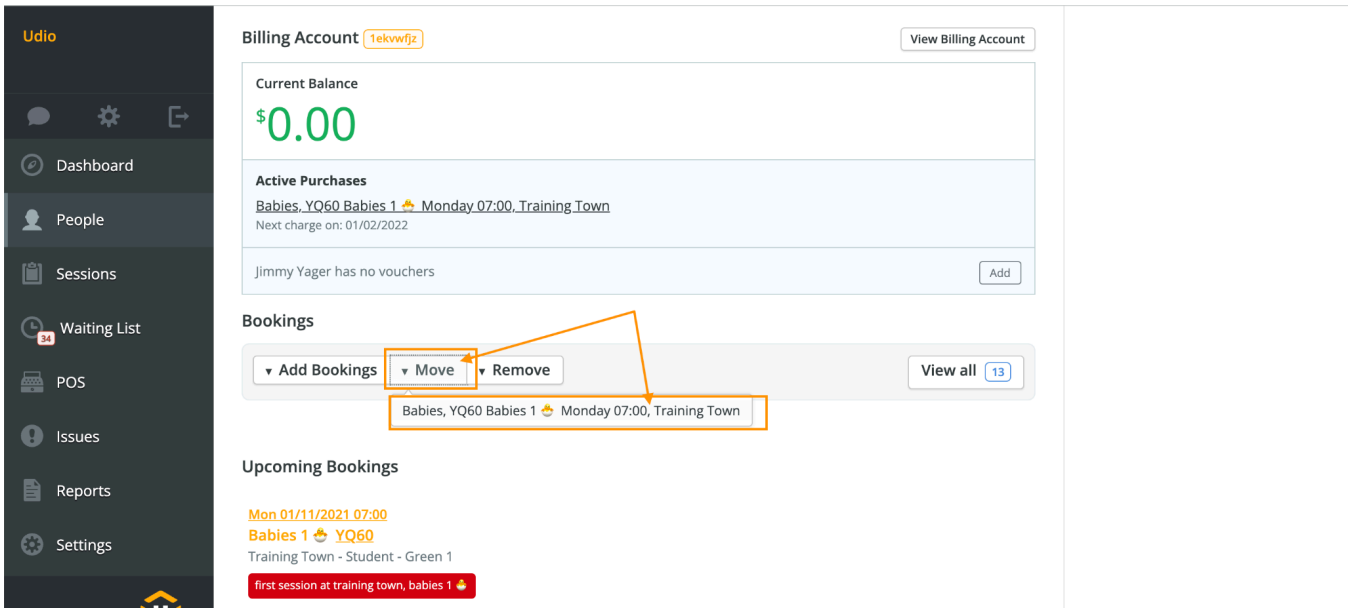

Udio
Change purchase & bookings
Babies, YQ60 Babies 1 Monday 07:00, Training Town Jimmy Yager
Select new Day & Time
New Course:
Babies 1
Day and Time:
Monday
07:00 YQ60 from 01/11/2021 Student: 3
09:00 5GX1 from 01/11/2021 Student: 5
09:00 XDI9 from 01/11/2021 Student: 6
10:00 5ATY from 01/11/2021 Student: 5
10:00 FSJQ from 01/11/2021 Student: 6
10:00 VIIQ 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
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings

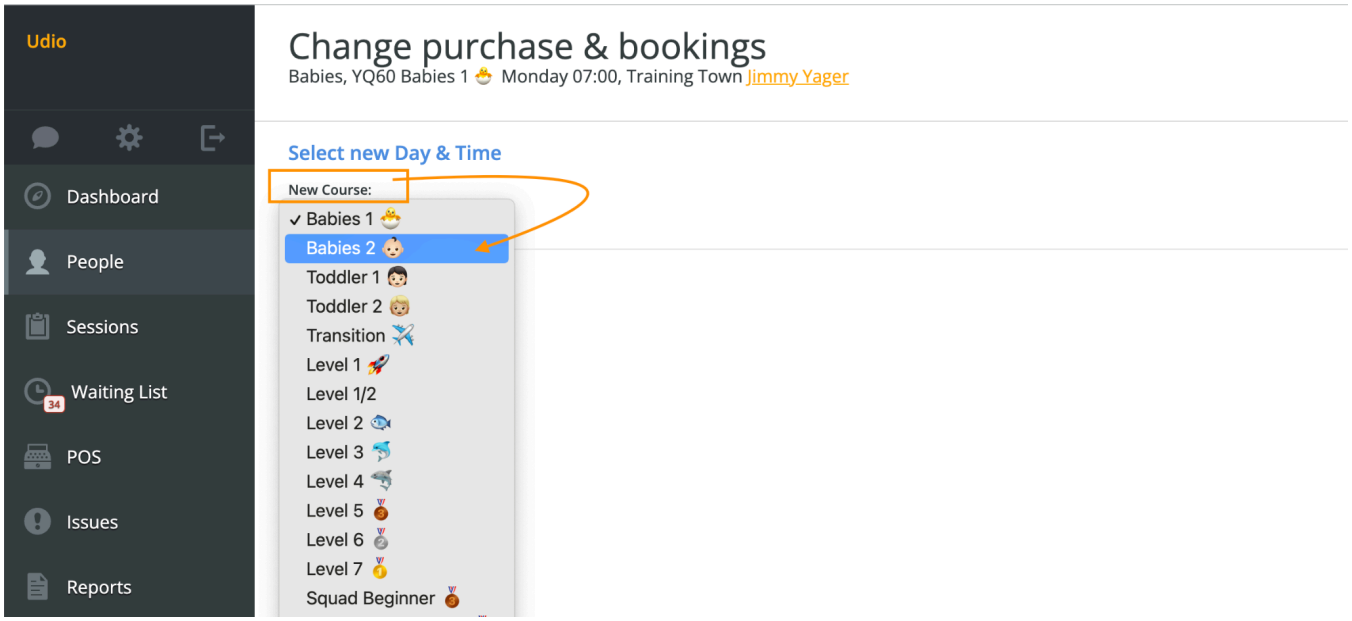


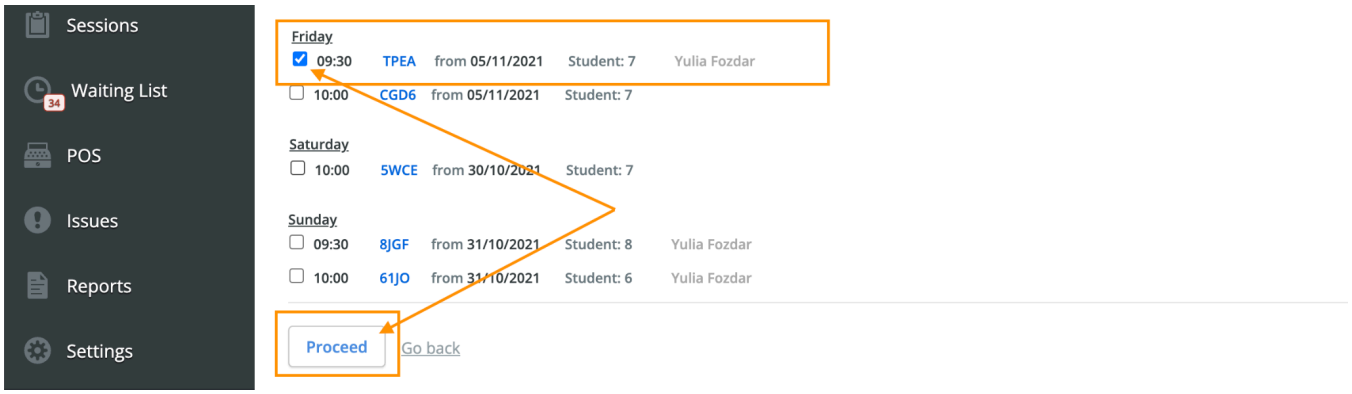
7.12 Moving a booking to another course

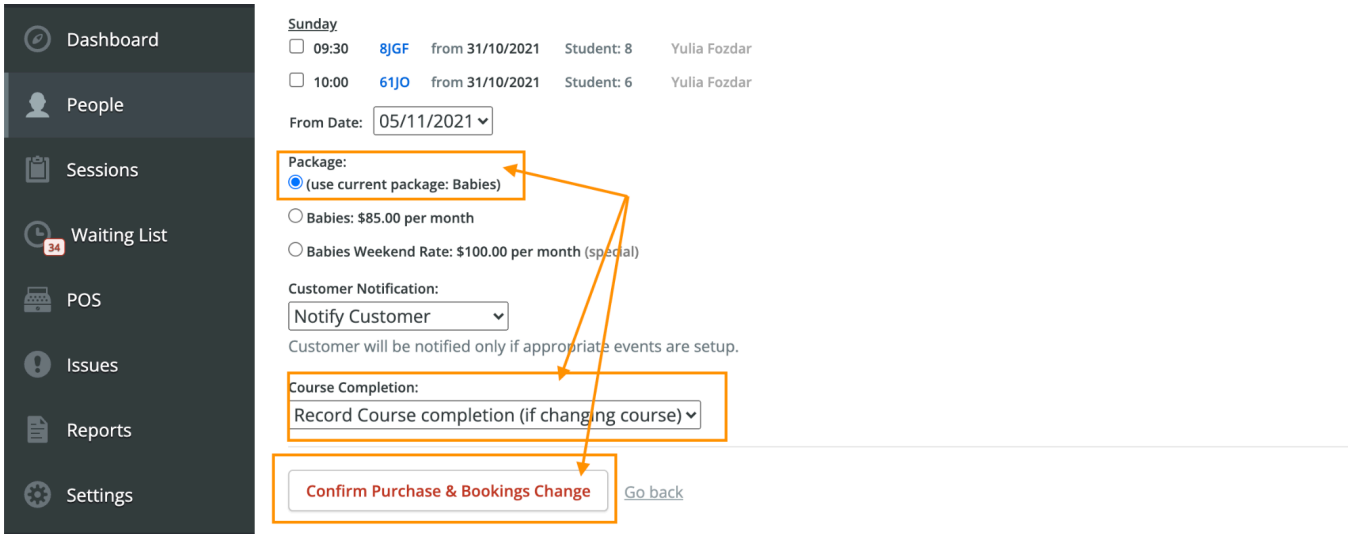
- Go to the 'people' page of the person you are moving
- Under 'bookings' click on 'move' and select course
- Select the new course and 'proceed'
- Select the day and time and 'proceed'
- Choose the 'from date' and 'proceed'
- Click '(use current package:') if moving to a new package and 'proceed'
-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





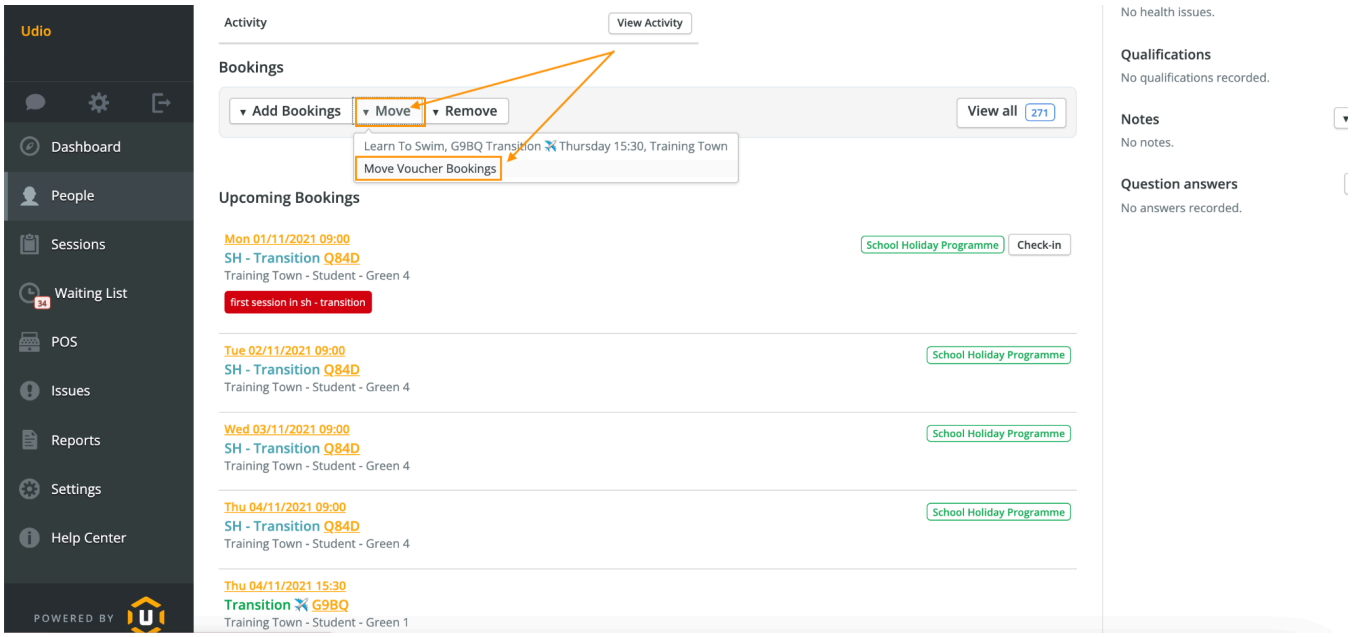


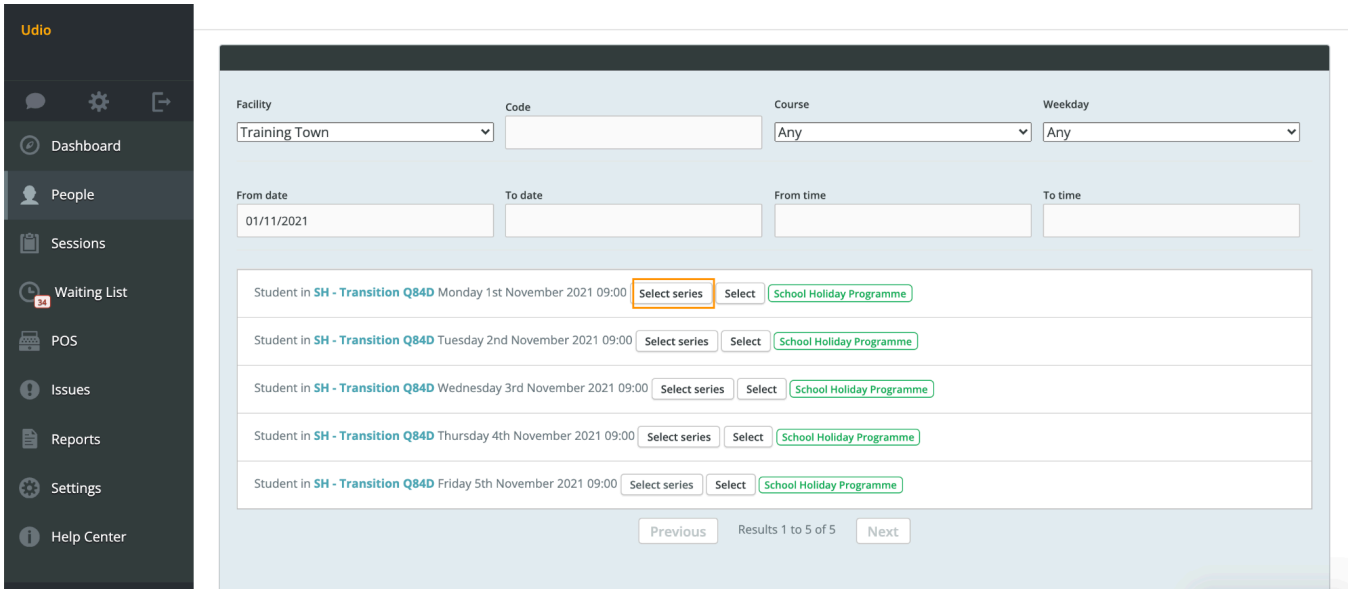


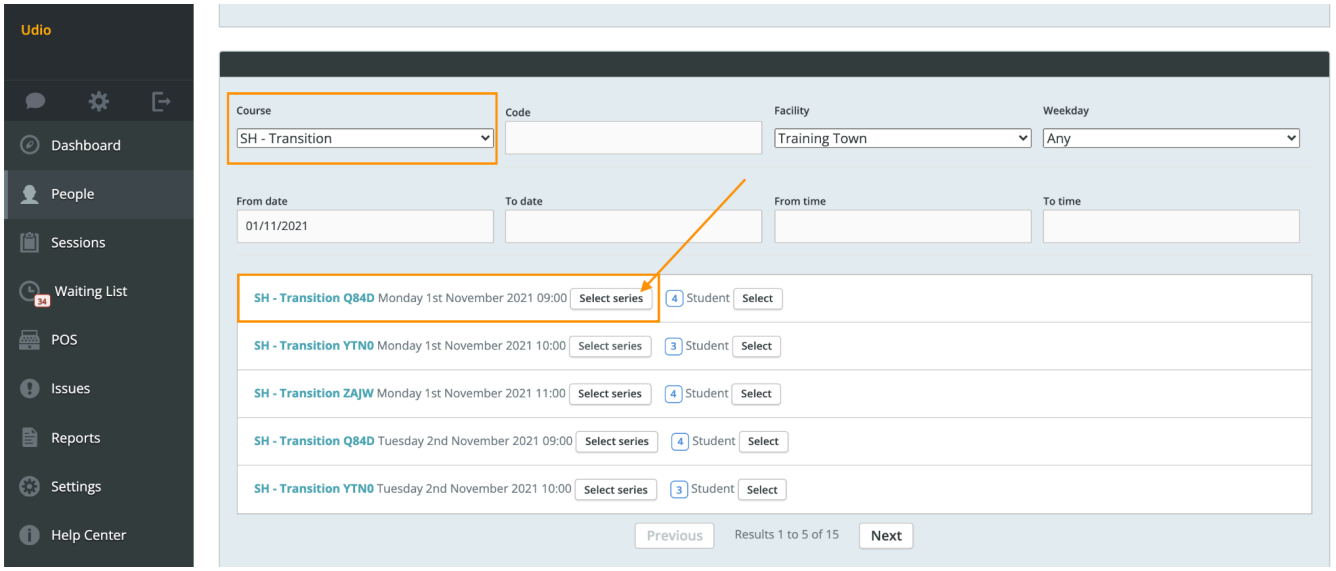
7.13 Moving a voucher-based booking such as school holiday program

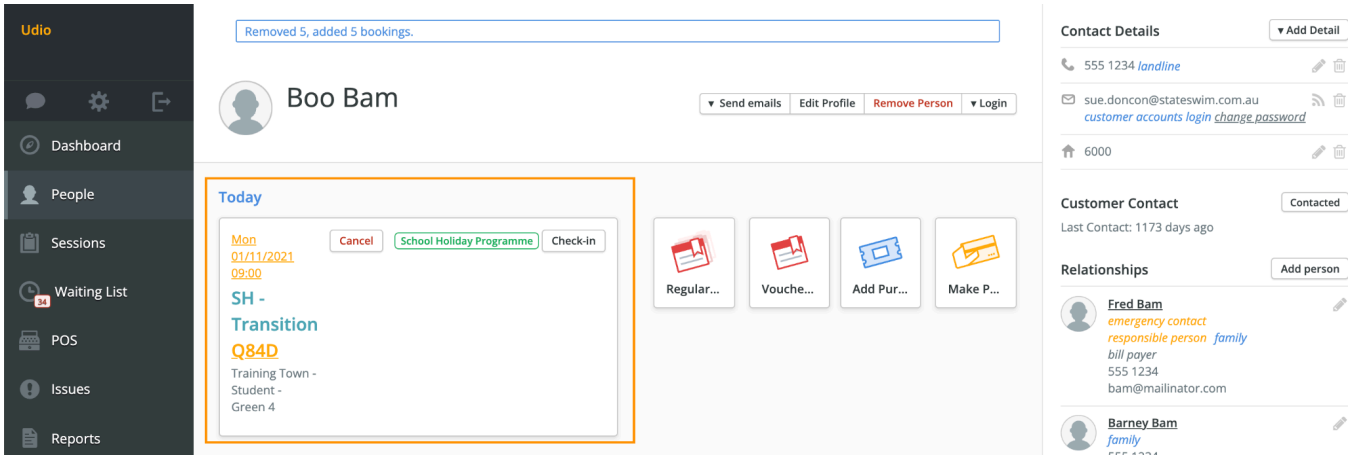
- Go to the 'people' page of the person you are moving

- 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





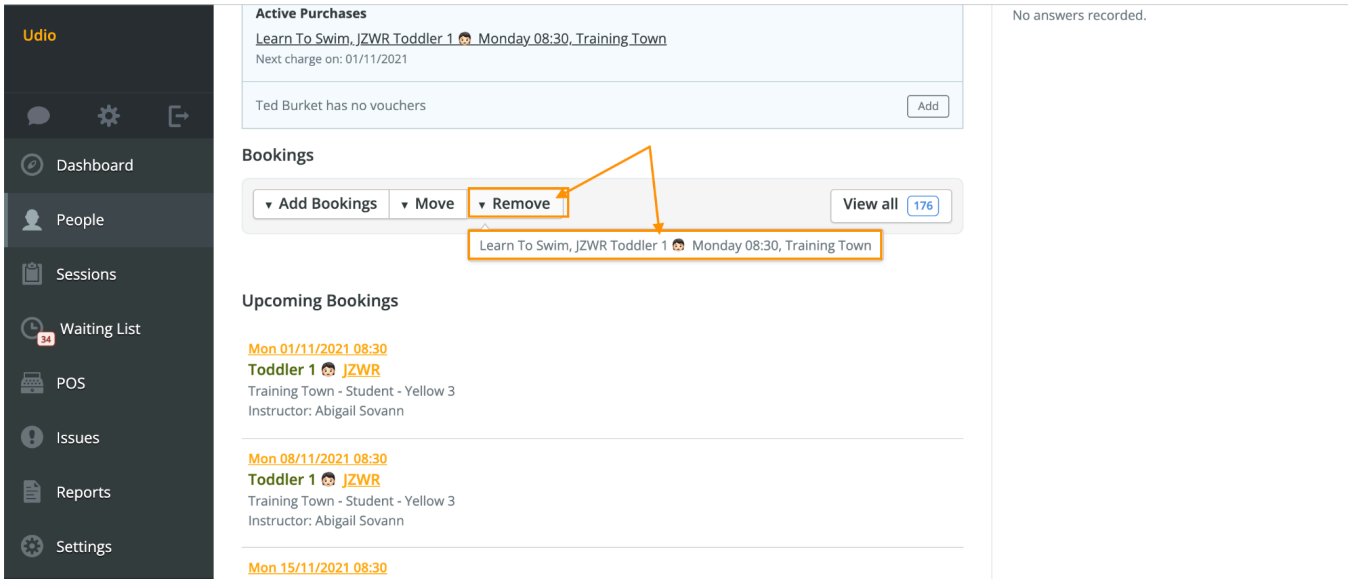


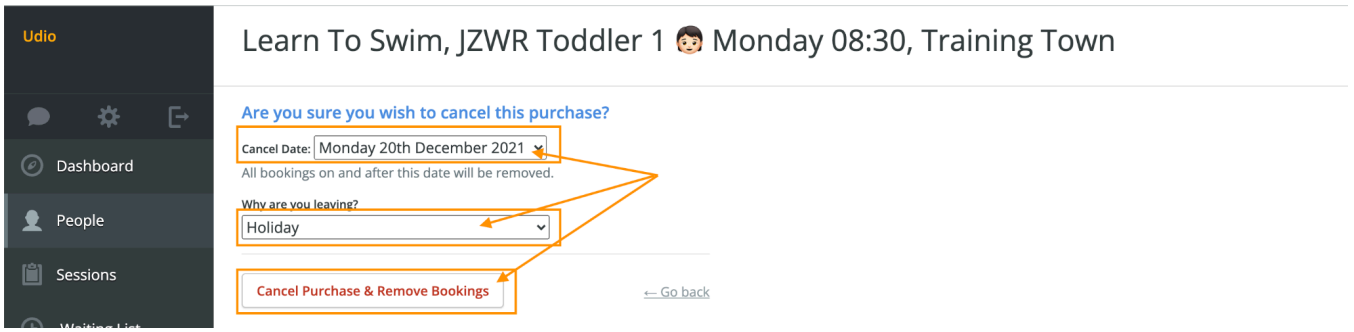


7.14 Removing a booking

- 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.

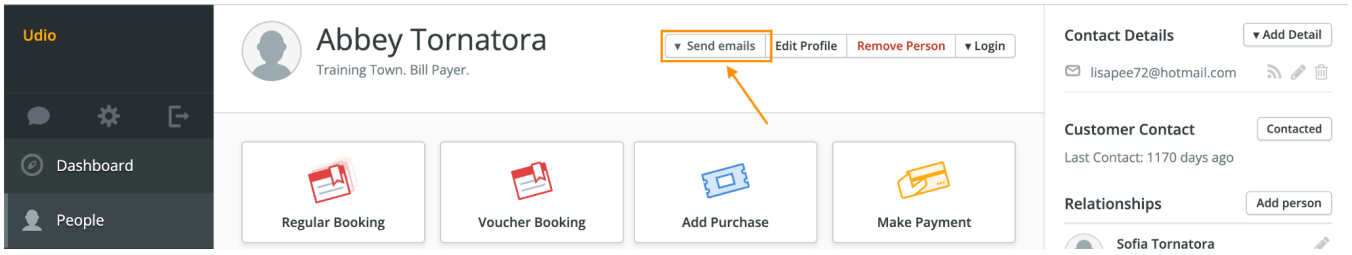


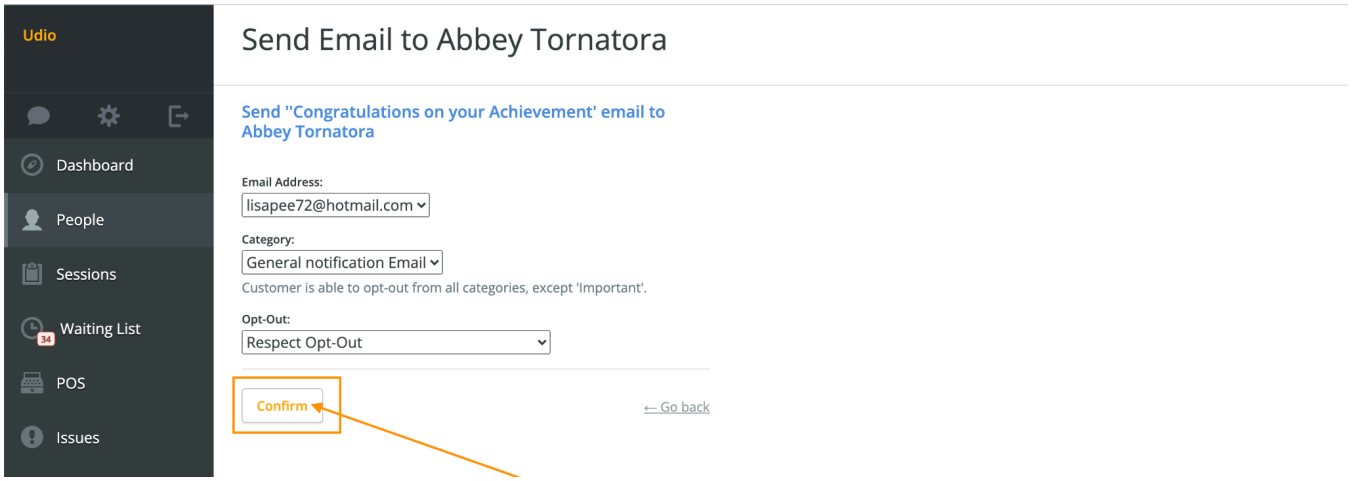


7.15 Sending an email manually

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

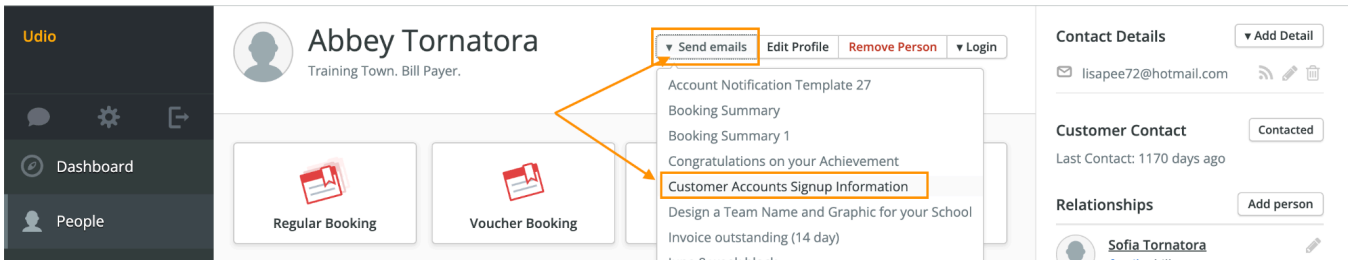
- Find customer via the 'people' page and click 'send emails' at the top of the page
- Select the email you wish to send and select 'confirm'

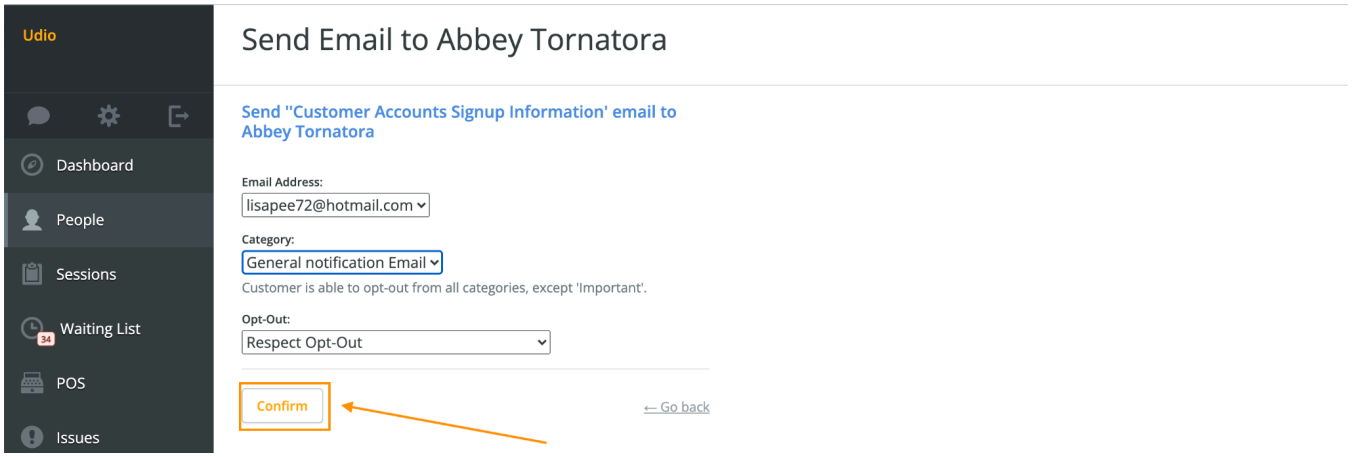




7.16 Sending link to customer portal

- 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'



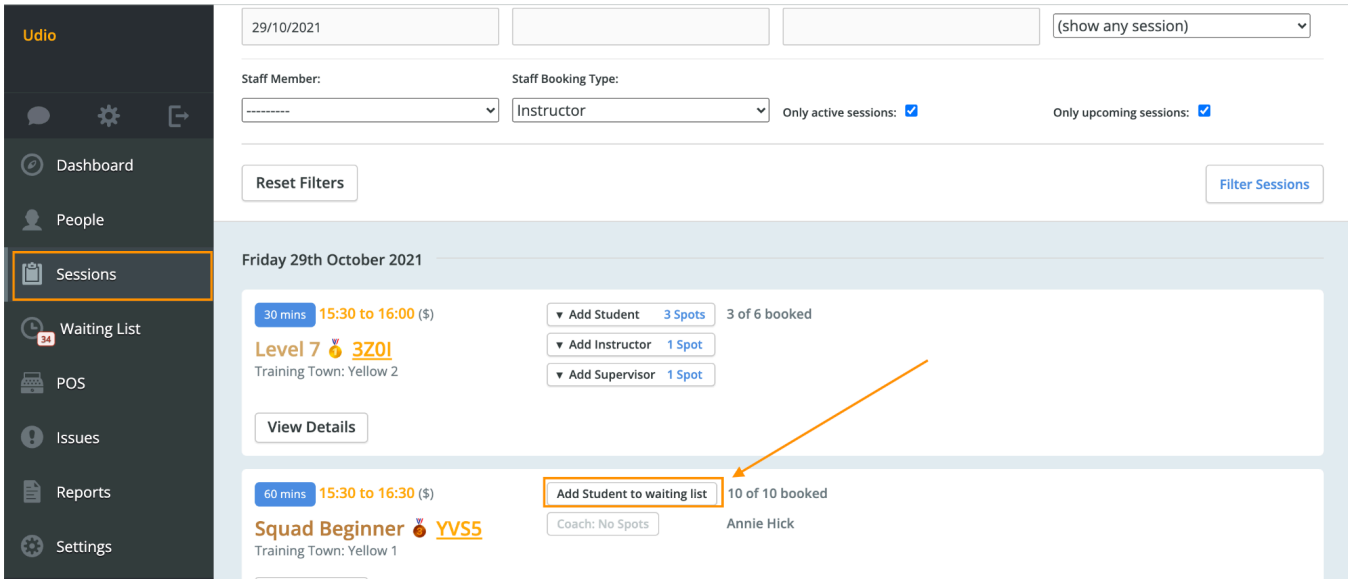


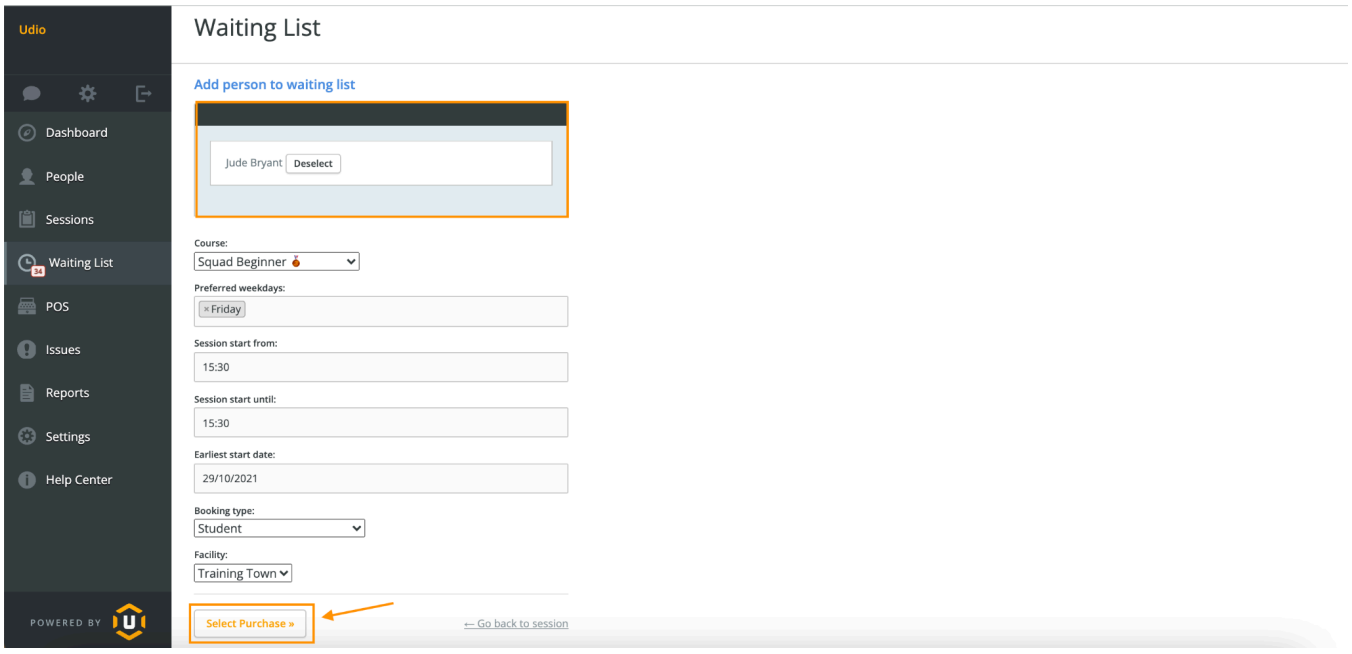
8. Waiting List

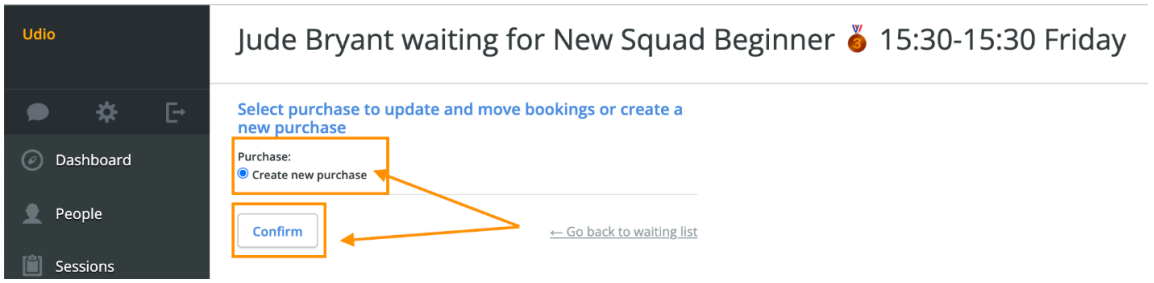
If a customer requests a time or day and a spot is not currently available, you can add them to the waiting list in Udio.

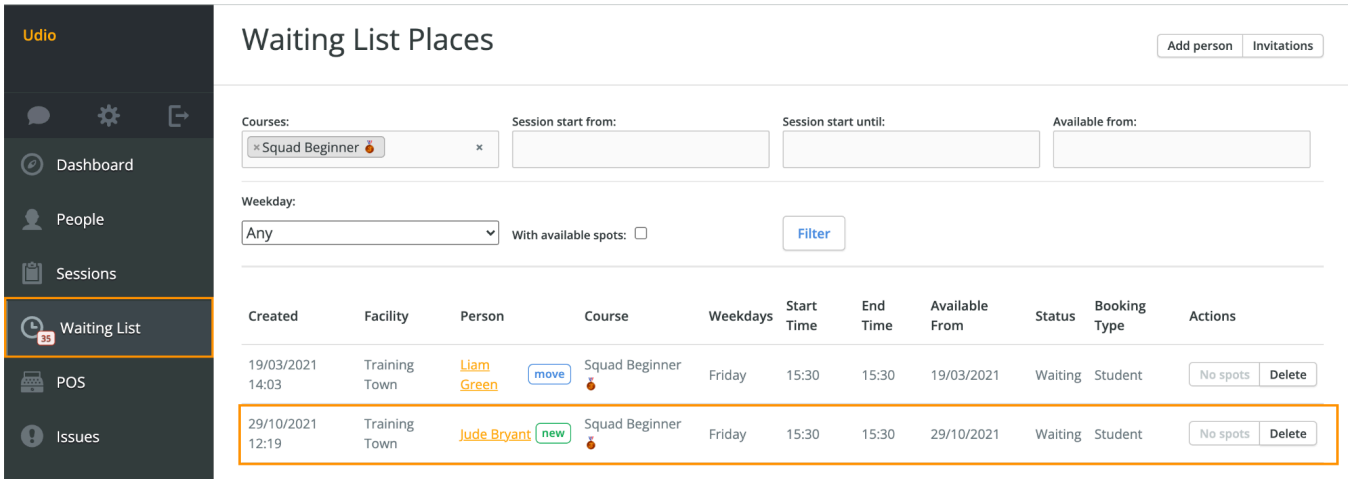
8.1 Adding a customer

- 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



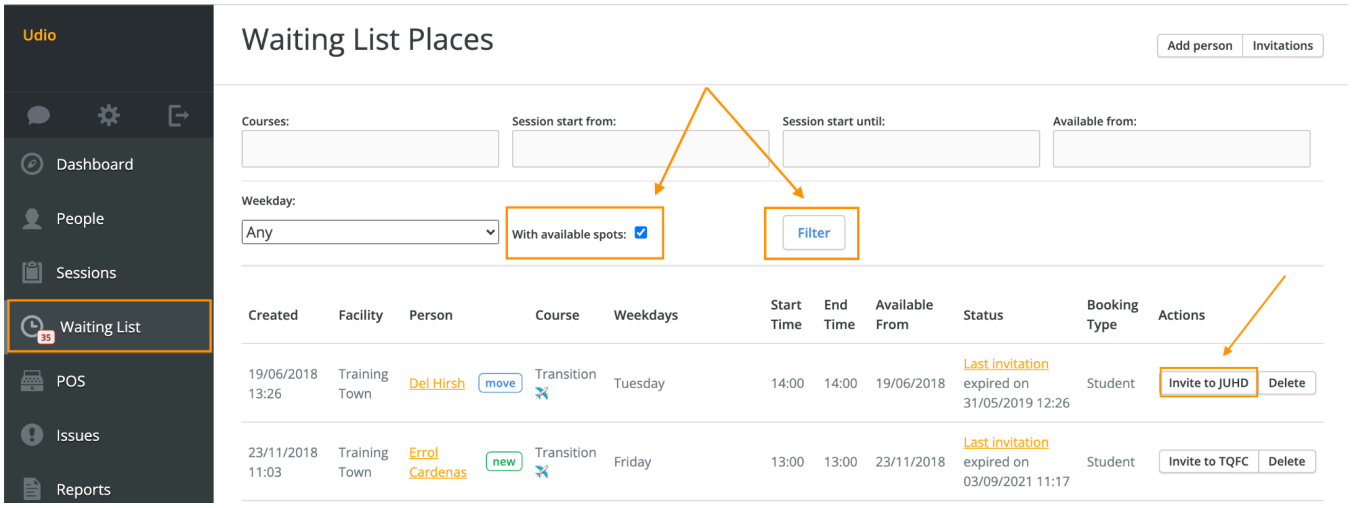


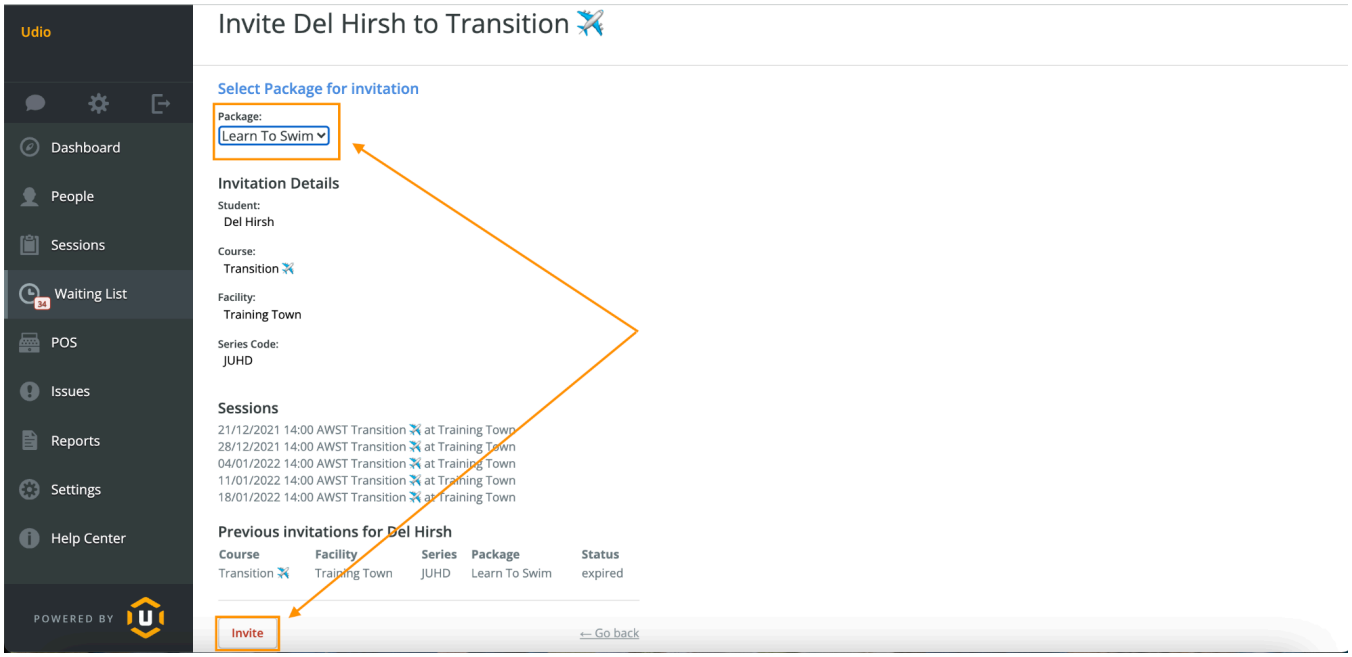


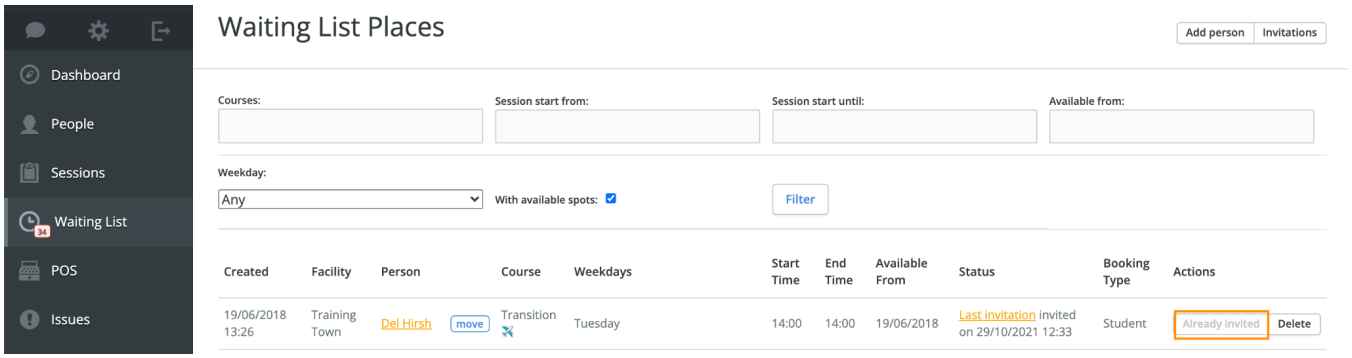


8.2 Inviting a customer

- 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
Waiting List Places
Add person
Invitations
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
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
move
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
new
Transition
Friday
13:00
13:00
23/11/2018
Last invitation expired on 03/09/2021 11:17
Student
Invite to TQFC
Delete


Udio
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
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Help Center
POWERED BY

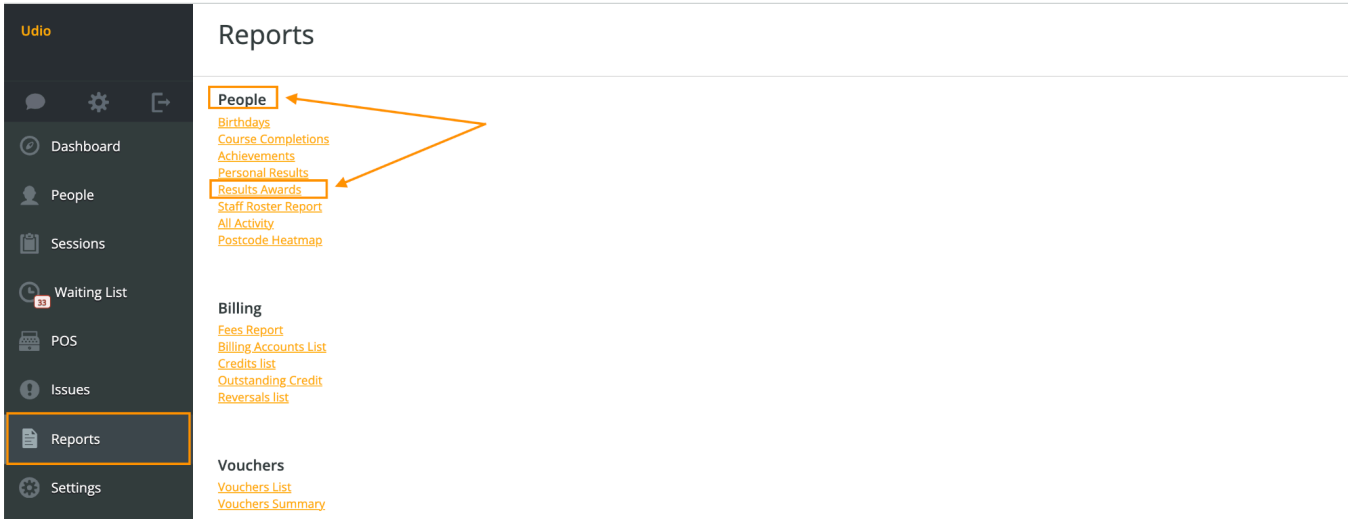

Waiting List Places
Add person
Invitations
Dashboard
People
Sessions
Waiting List
POS
Issues
Courses:
Session start from:
Session start until:
Available from:
Weekday:
Any
With available spots:
Filter
Created
Facility
Person
Course
Weekdays
Start Time
End Time
Available From
Status
Booking Type
Actions
19/06/2018 13:26
Training Town
Del Hirsh
move
Transition
Tuesday
14:00
14:00
19/06/2018
Last invitation invited on 29/10/2021 12:33
Student
Already invited
Delete

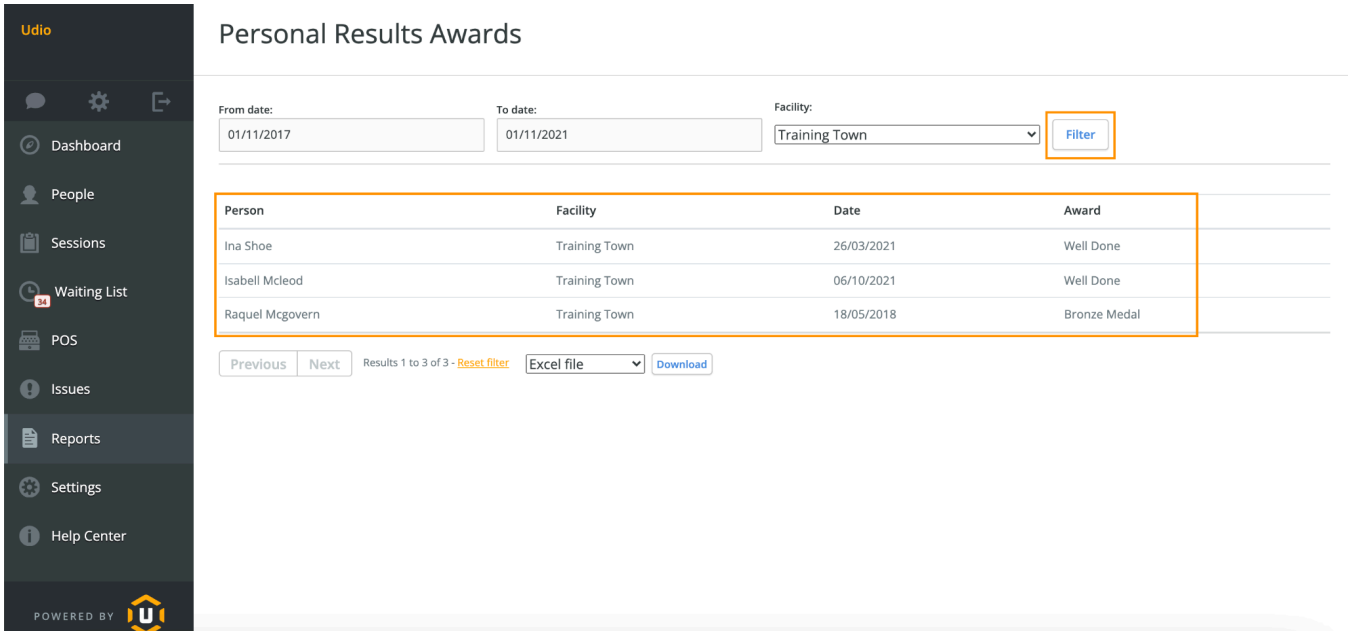
9. Personal best results and awards

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.

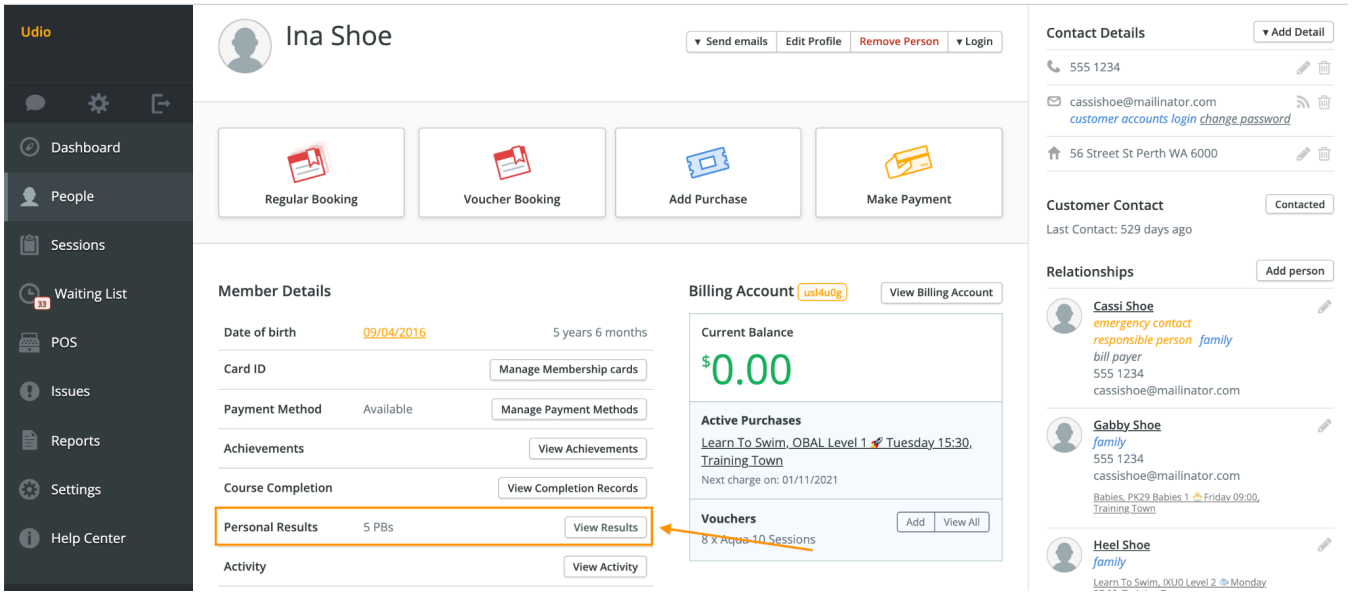


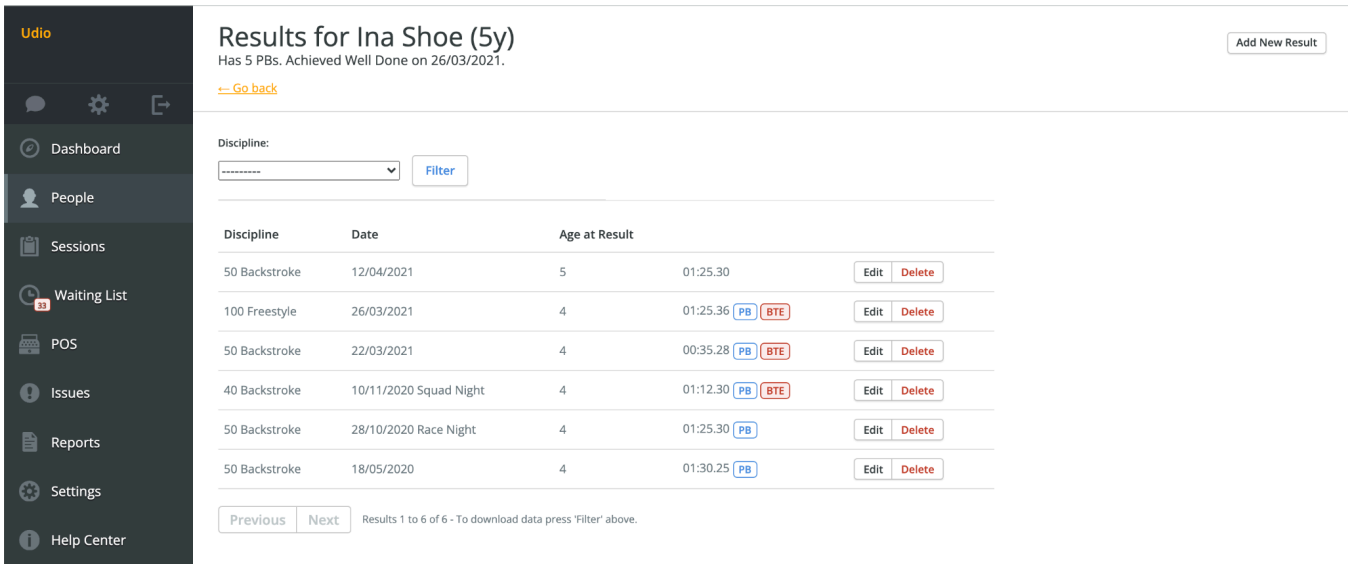


9.1 Viewing personal results

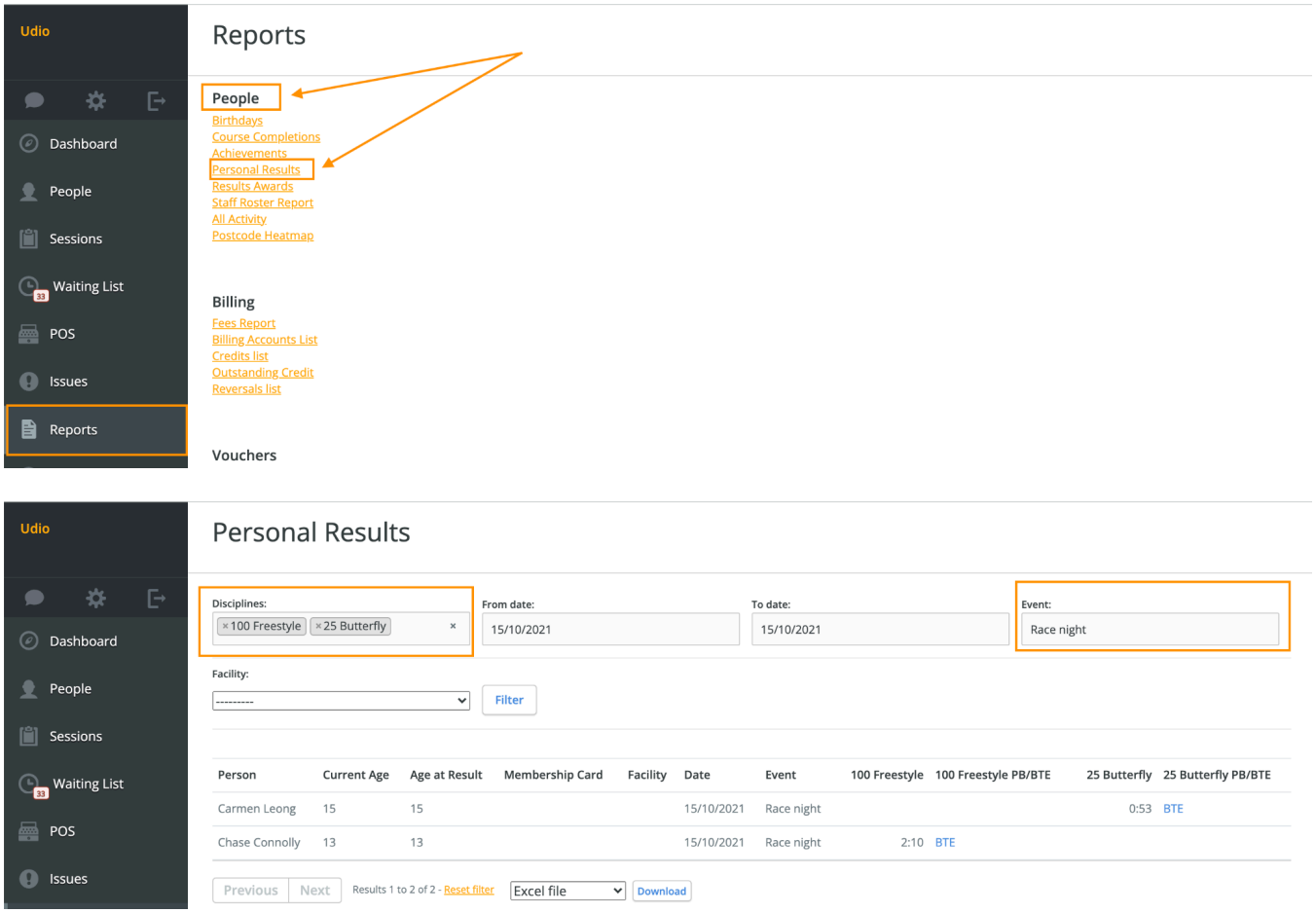
There are two ways to view personal results.

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





- 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)

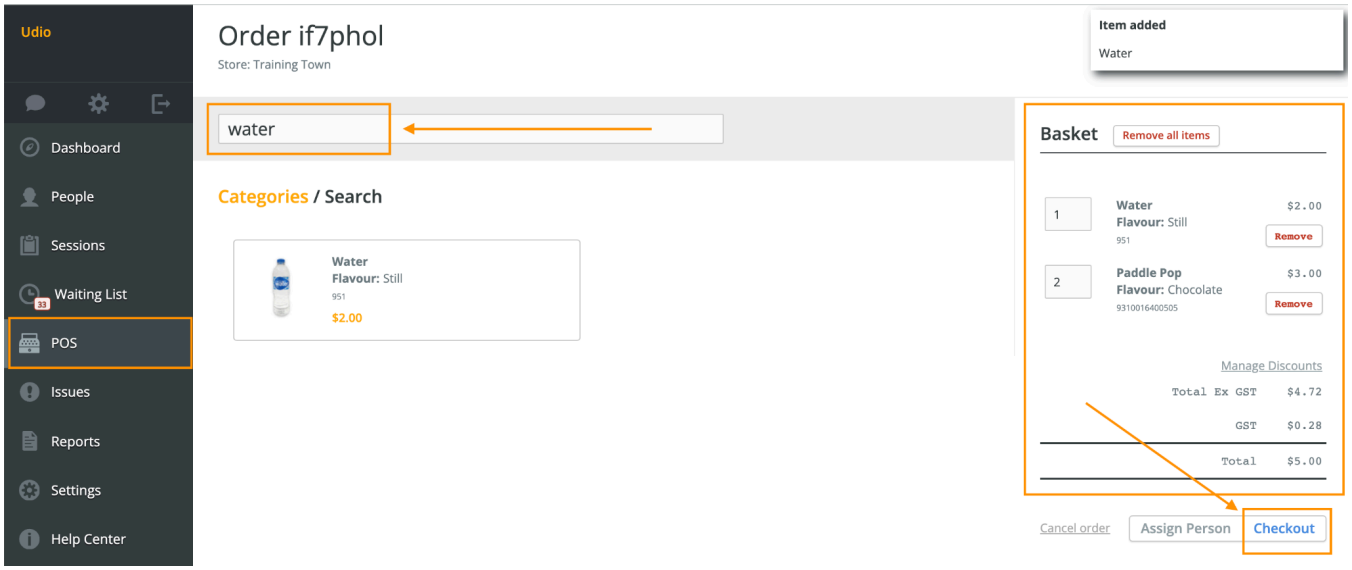
Go to the 'POS' tab on the left-hand navigation menu.

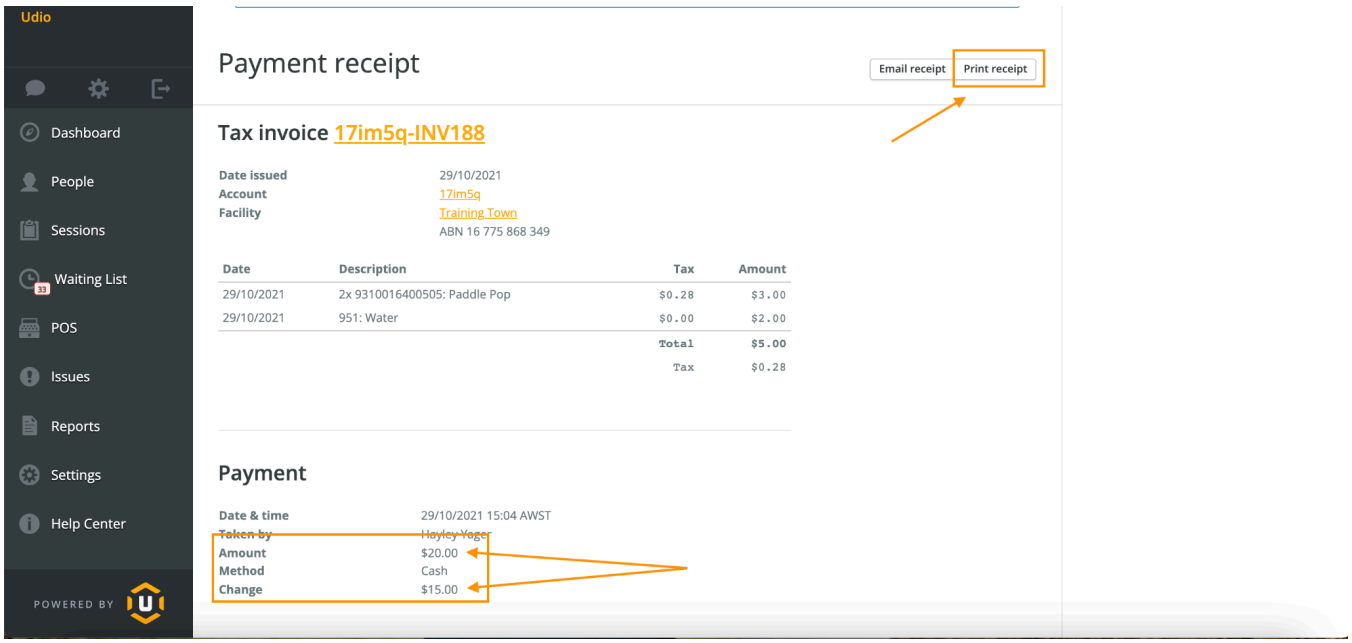
10.1 Purchasing a shop item and paying at time of purchase

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



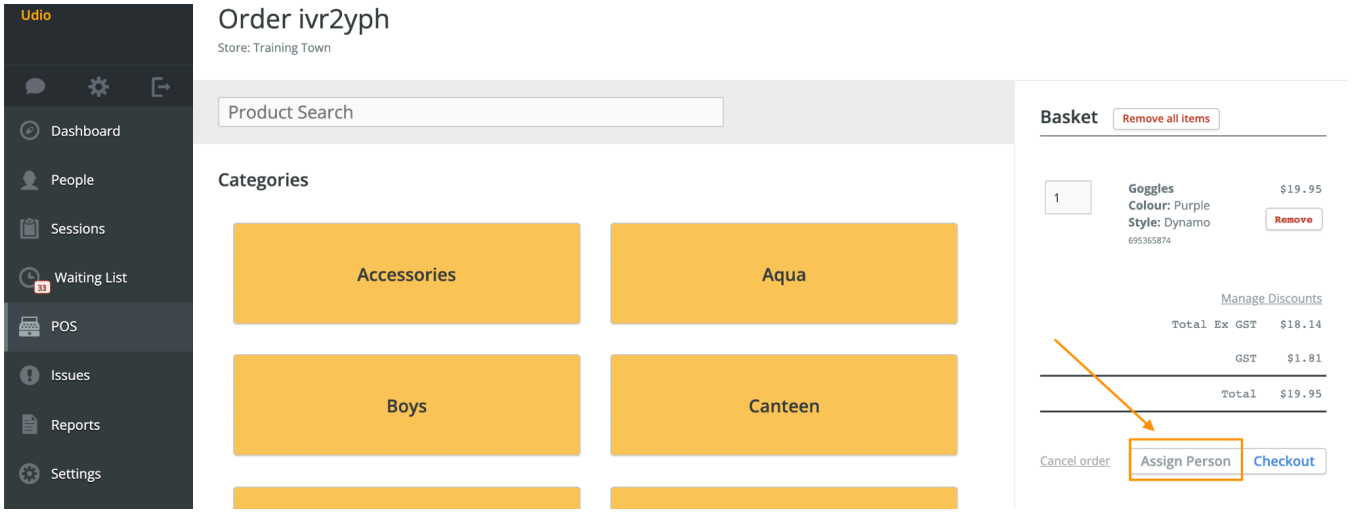


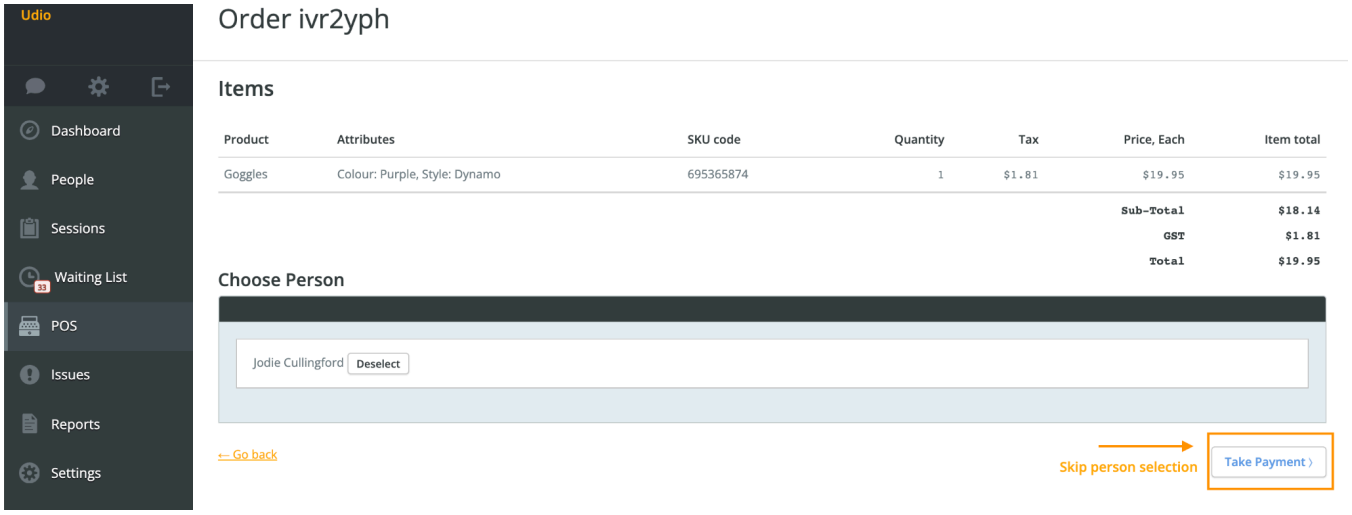
10.2 Paying for fees and purchasing from shop at the same time or adding POS items to billing account

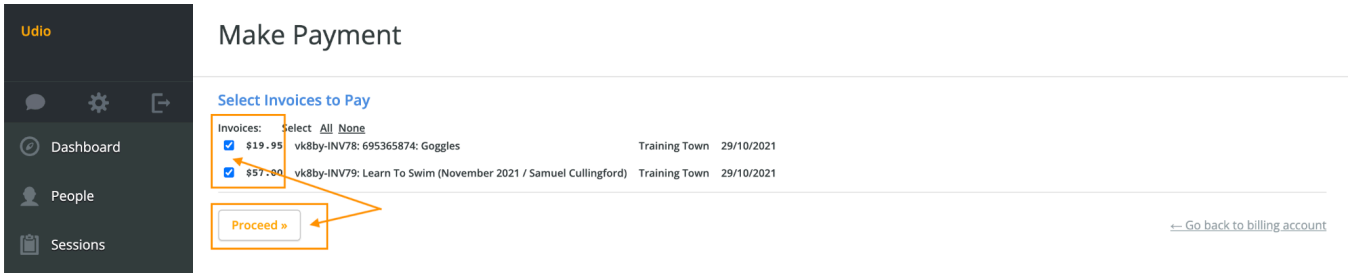
You can pay for fees and shop items in the same transaction.

- 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’







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

