UDIO TRAINING

PRODUCTION (TERM-BASED)

Welcome to the training guide following the completion of your production environment (term-based)

In this manual, we'll walk you through the next steps once your production environment is up and running, including creating your timetable, booking your customers in and adding debits/credits to accounts.

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

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

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

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1. Next steps once your production environment is complete

1.1 Data import

The onboarding team will ask for your people data and import into Udio; you will be advised once this is complete.

1.2 Creating Sessions

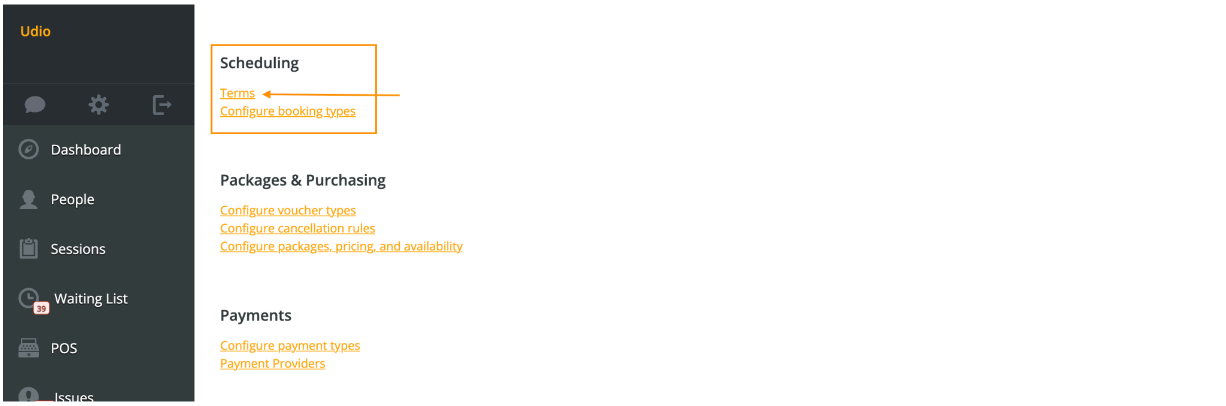
While Udio handles your people import, you can start creating your timetable (or 'sessions' in Udio).

- Ensure that the term dates and eligible courses have been added to 'Terms' (under 'Scheduling') in Settings
- Click the 'Sessions' tab in the left-hand menu
- Click *'Add New'* then select *'Sessions'* from the drop-down menu
- Select the relevant course and facility, then *'Proceed'*
- Select the term, weekdays and times for this session
- Choose the duration from the drop-down box and the resource
- Tick the *'Resources are only for those sessions'* checkbox

Under 'Booking configurations':

- Select 'Type' from the drop-down box and enter the maximum number of participants for the session
- Click *'Add Booking Configuration'* to repeat this process for any other types, such as instructor and supervisor
- Click *'Confirm'* to create session
- Repeat to complete your timetable

Watch video on creating a new session →


Udio
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Sessions
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Scheduling
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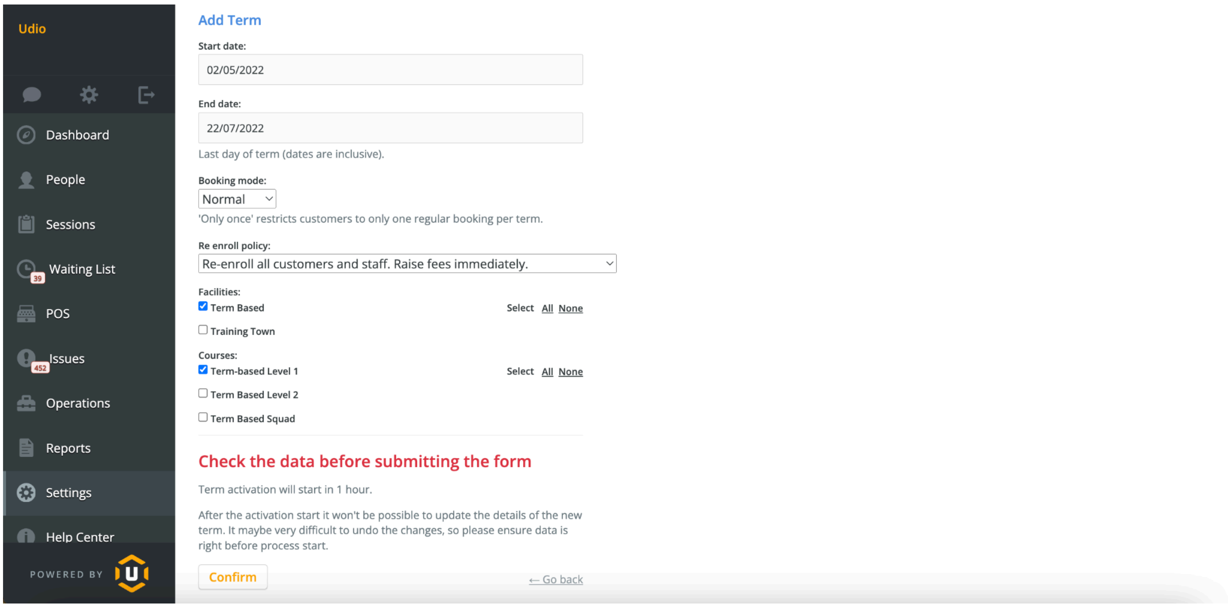
Configure booking types
Packages & Purchasing
Configure voucher types
Configure cancellation rules
Configure packages, pricing, and availability
Payments
Configure payment types
Payment Providers


Udio
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Operations
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Settings
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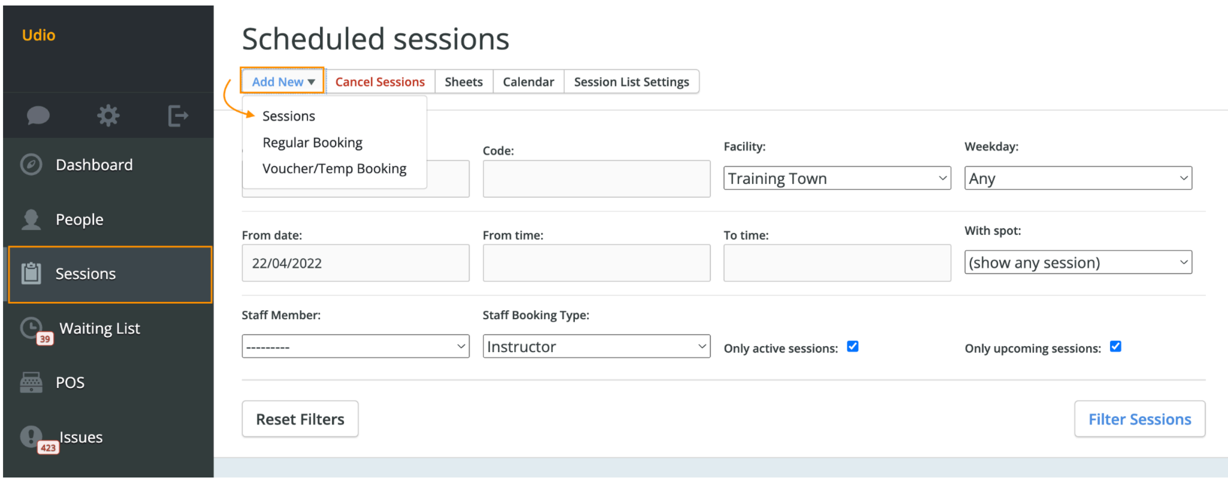
POWERED BY
Add Term
Start date:
02/05/2022
End date:
22/07/2022
Last day of term (dates are inclusive).
Booking mode:
Normal
'Only once' restricts customers to only one regular booking per term.
Re enroll policy:
Re-enroll all customers and staff. Raise fees immediately.
Facilities:
Term Based
Select All None
Training Town
Courses:
Term-based Level 1
Select All None
Term Based Level 2
Term Based Squad
Check the data before submitting the form
Term activation will start in 1 hour.
After the activation start it won't be possible to update the details of the new term. It maybe very difficult to undo the changes, so please ensure data is right before process start.
Confirm
← Go back


Udio
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Scheduled sessions
Add New ▾
Cancel Sessions
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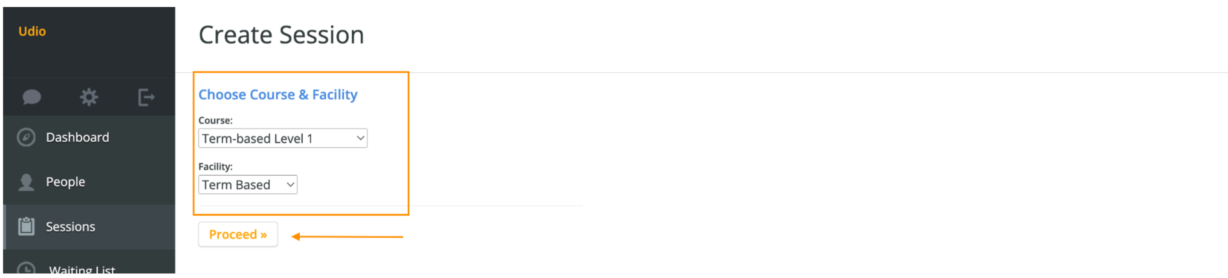
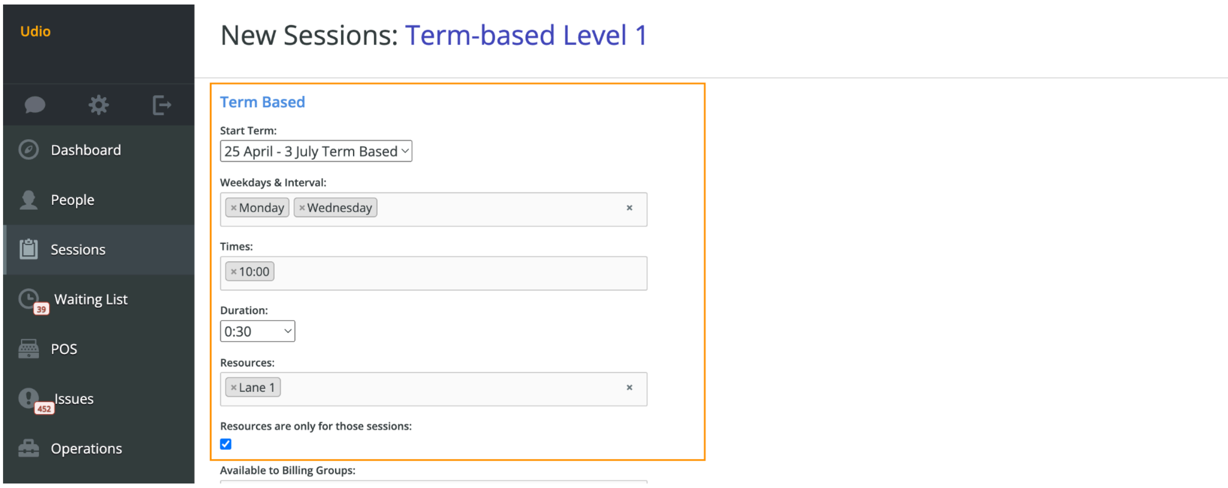
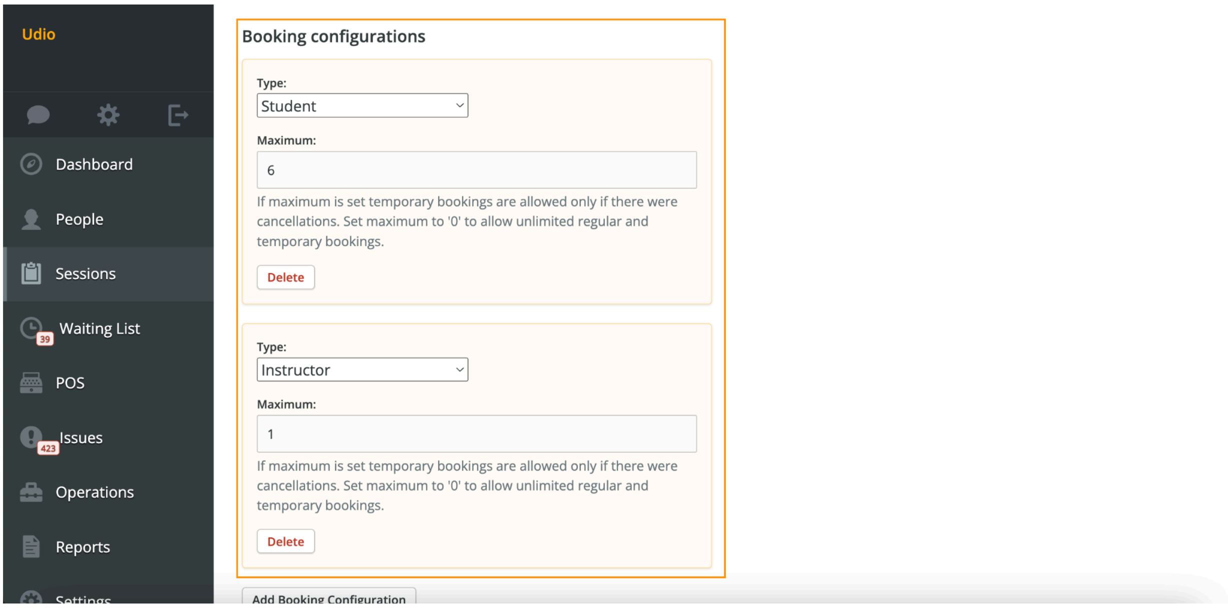
Calendar
Session List Settings
Sessions
Regular Booking
Voucher/Temp Booking
Code:
Facility:
Training Town
Weekday:
Any
From date:
22/04/2022
From time:
To time:
With spot:
(show any session)
Staff Member:

Staff Booking Type:
Instructor
Only active sessions:
Only upcoming sessions:
Reset Filters
Filter Sessions


Udio
Dashboard
People
Sessions
Waiting List
Create Session
Choose Course & Facility
Course:
Term-based Level 1
Facility:
Term Based
Proceed »





1.3 Booking into a session

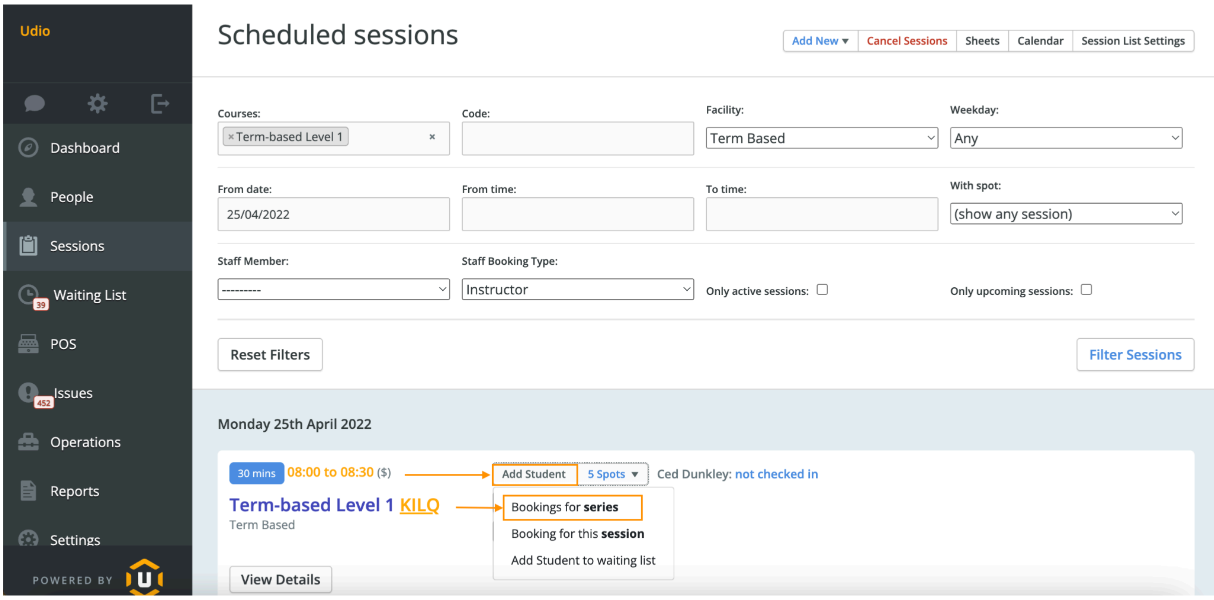
Once your people import is complete and your timetables are created, you can then start booking your customers into their session.

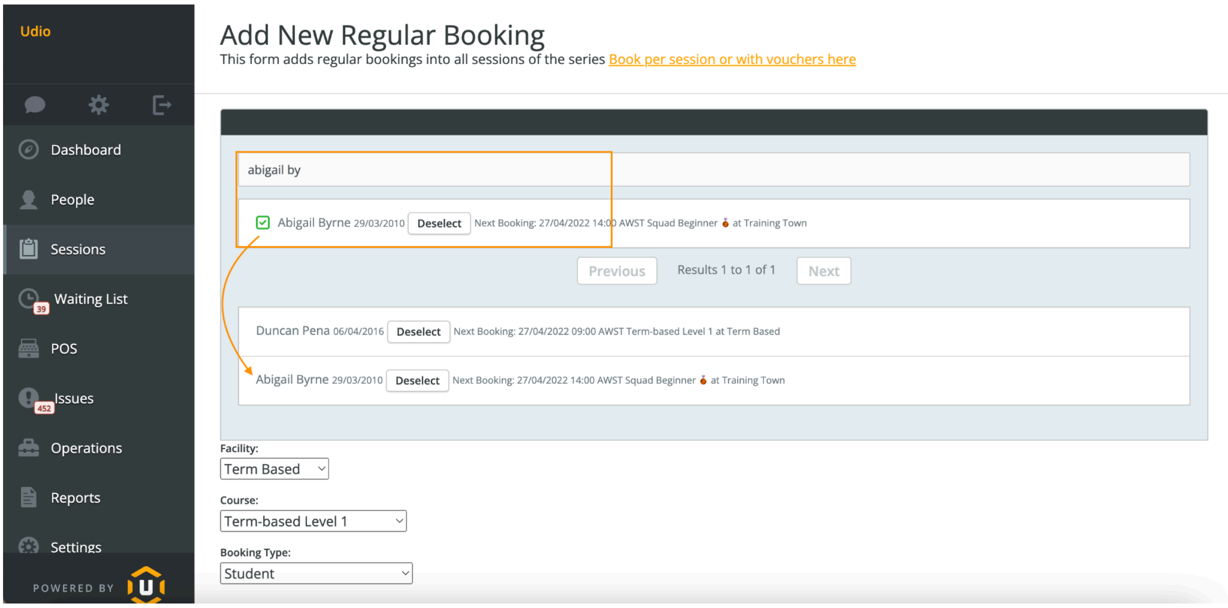
From the 'Sessions' section:

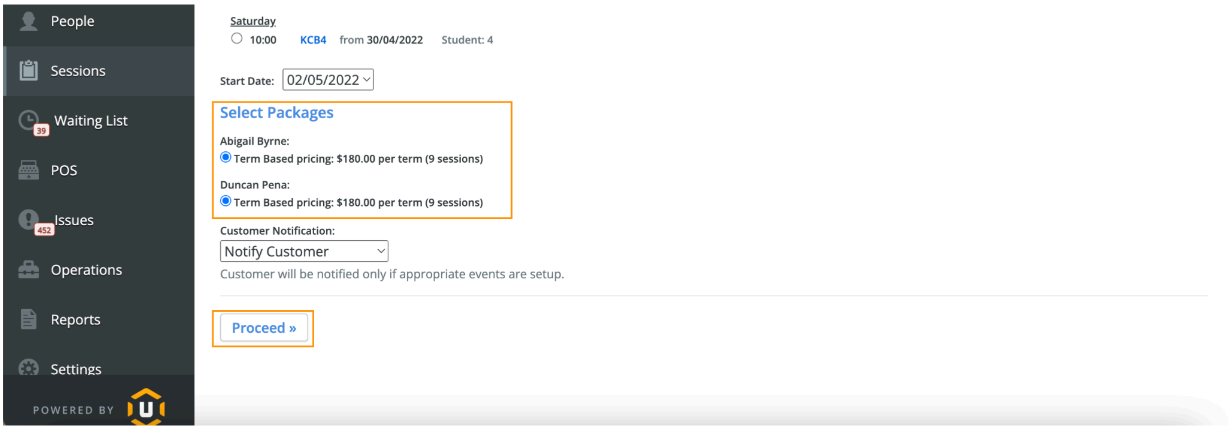
- Find the session the customer needs to be booked into
- Click *'Add Student'* then *'Bookings for series'* in the drop-down, then *'Find people'*
- Search the name of the student and *'Select'*
- Repeat the search for all the students to be booked into this session (they should all be visible under the search results)

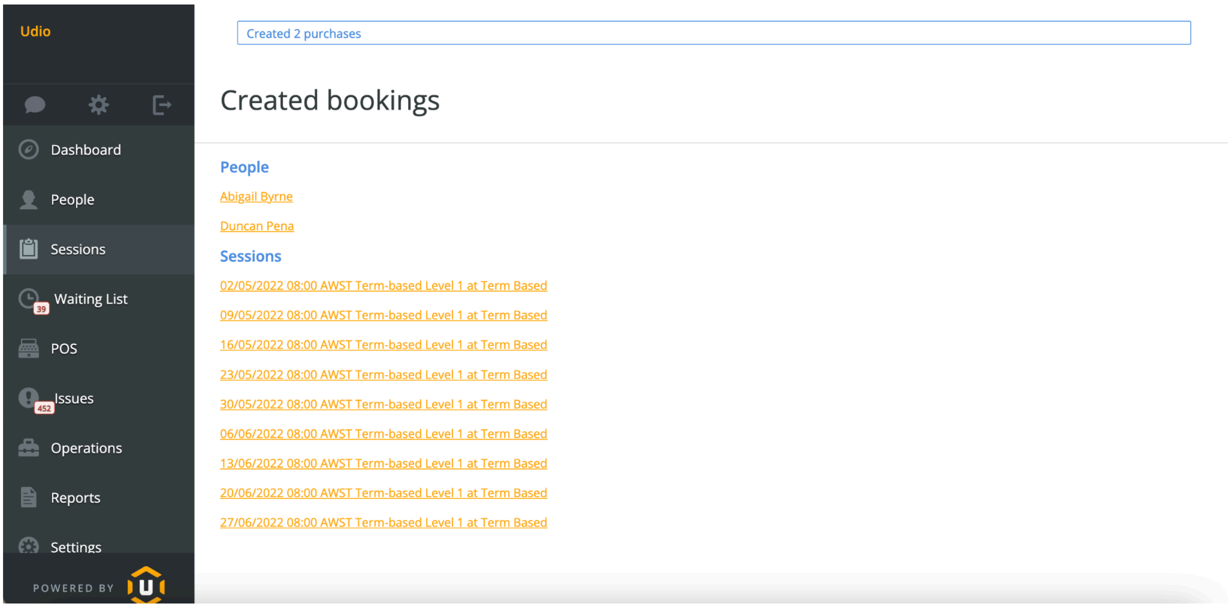
- Check the booking information and start date is correct and click *'Proceed'*
- Select the package type for all selected students and *'Proceed'*
- Double-check all details are correct and click *'Confirm new bookings'*
- You will then be taken to the 'Created bookings' page
- Repeat the above for all sessions

[Watch video on booking into a session](#) →









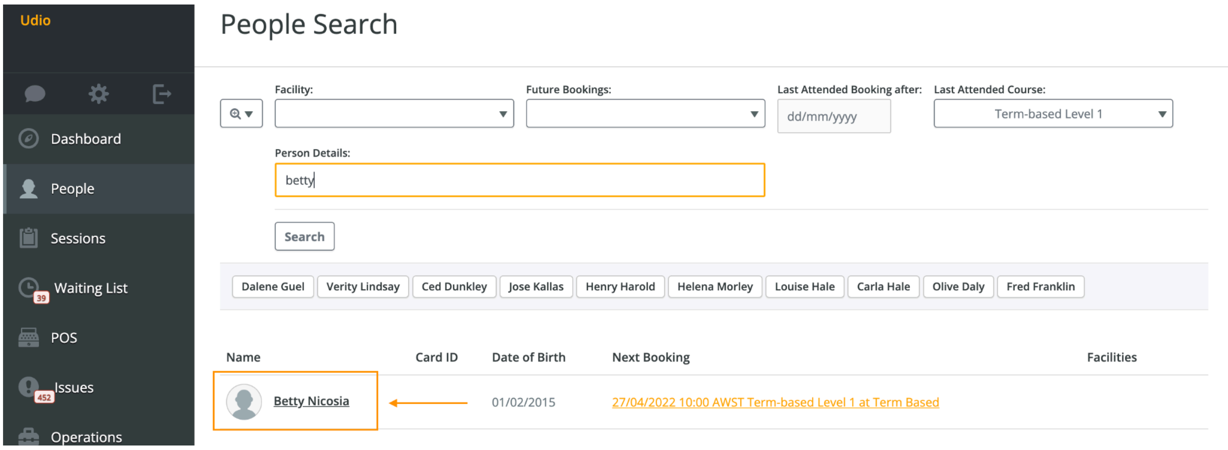
1.4 Transferring debits and credits

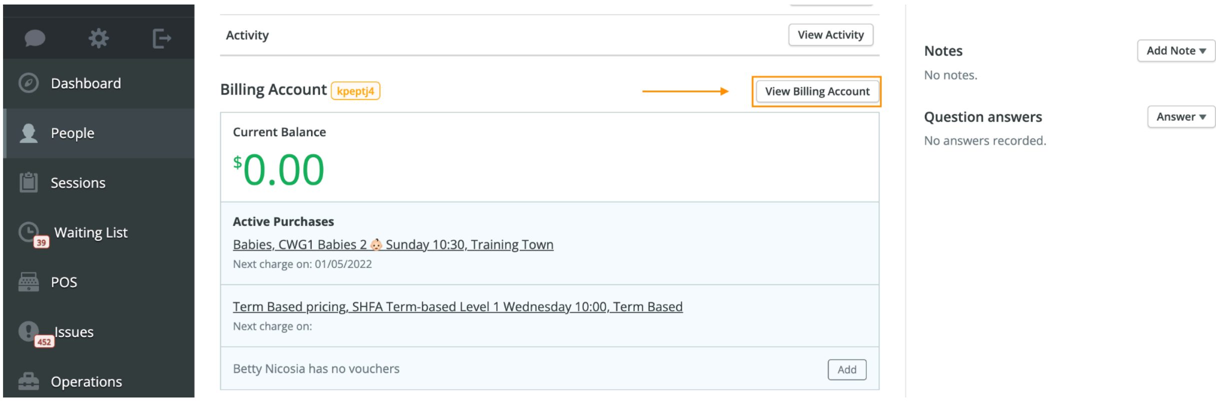
Udio is only able to import people data; you will need to manually enter everything else associated with a customer.

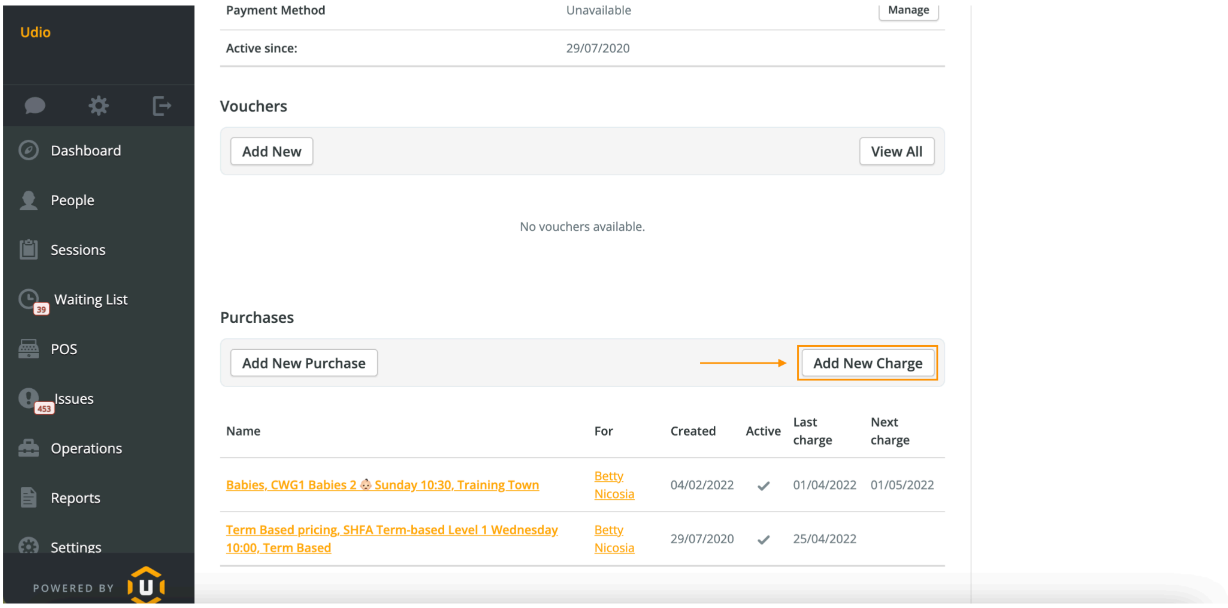
1.5 Adding a debit to an account

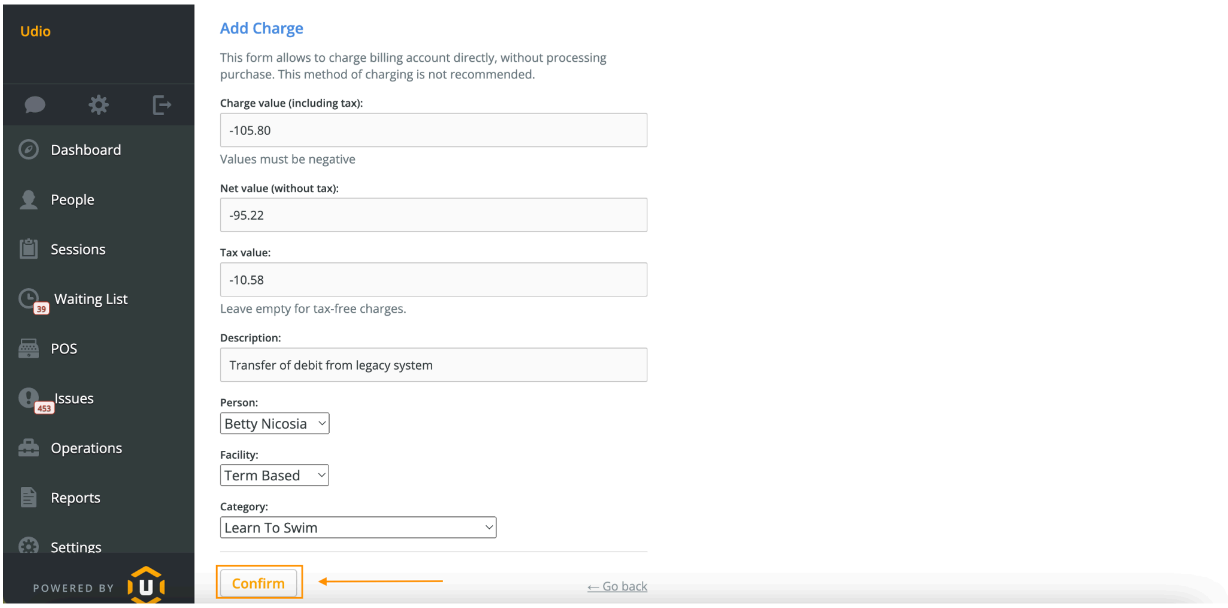
- Go to 'People' and search for the customer whose account you want to add a debit to
- Scroll down and click *'View Billing Account'* and towards the bottom of the page, click *'Add New Charge'*
- Complete all fields remembering to add a '-' in front of the values so Udio knows its a credit

- This will create an invoice which can then be paid (ensure you select the correct category as this information is reported on all financial reports)



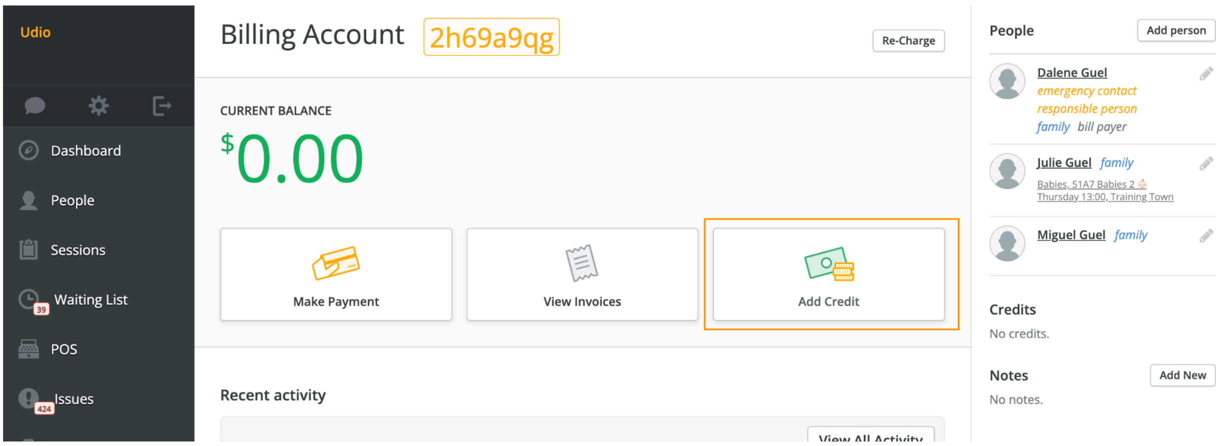






1.6 Adding a credit to an account

- Go to 'People' and search for the customer whose account you want to add a debit to
- Click *'View Billing Account'* and then *'Add Credit'* towards the right-hand side of the screen
- Complete all fields including a description




Udio
Dashboard
People
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Waiting List
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POS
Issues
424
Billing Account: 2h69a9qg | Dalene Guel
Add Credit
Value:
50.00
Description:
Transfer from legacy system
Person:
Dalene Guel
Facility:
Training Town
Confirm
← Go back