



# 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](mailto:support@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

<b>Next steps once your production environment is complete</b>	<b>3</b>
1.1 Data import	3
1.2 Creating Sessions	3
1.3 Booking into a session	5
1.4 Transferring debits and credits	8
1.5 Adding a debit to an account	8
1.6 Adding a credit to an account	9

# 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

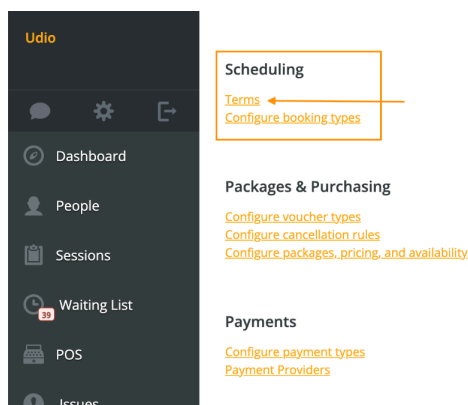
While Udio handles your people import, you can start creating your timetable (or 'sessions' in Udio).

- 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

Dashboard

People

Sessions

Waiting List

POS

Issues

Operations

Reports

Settings

Help Center

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

Dashboard

People

Sessions

Waiting List

POS

Issues

### Scheduled sessions

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

The screenshot displays the Udio application interface. On the left is a dark sidebar with navigation icons and labels: Udio, Dashboard, People, Sessions, Waiting List (with a red badge '39'), POS, Issues (with a red badge '452'), and Operations. The main content area is titled 'New Sessions: Term-based Level 1'. It features a 'Term Based' configuration box with fields for 'Start Term' (25 April - 3 July Term Based), 'Weekdays & Interval' (Monday, Wednesday), 'Times' (10:00), 'Duration' (0:30), and 'Resources' (Lane 1). Below this is a checkbox for 'Resources are only for those sessions:' which is checked. At the bottom of this section is a field for 'Available to Billing Groups:'. Below the first section is a 'Booking configurations' section with two entries. The first entry is for 'Student' type with a 'Maximum' of 6, and the second is for 'Instructor' type with a 'Maximum' of 1. Both entries include a 'Delete' button and explanatory text about temporary bookings. At the bottom of the page is a button labeled 'Add Booking Configuration'.

### 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](#) →

**Scheduled sessions**

[Add New](#) [Cancel Sessions](#) [Sheets](#) [Calendar](#) [Session List Settings](#)

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](#)

**Monday 25th April 2022**

30 mins 08:00 to 08:30 (\$) [Add Student](#) [5 Spots](#) Ced Dunkley: not checked in

**Term-based Level 1 KILQ** [Bookings for series](#)  
 Term Based [Booking for this session](#)  
[Add Student to waiting list](#)

[View Details](#)

**Add New Regular Booking**

This form adds regular bookings into all sessions of the series [Book per session or with vouchers here](#)

Name	Date	Next Booking
Abigail Byrne	29/03/2010	Next Booking: 27/04/2022 14:00 AWST Squad Beginner at Training Town
Duncan Pena	06/04/2016	Next Booking: 27/04/2022 09:00 AWST Term-based Level 1 at Term Based
Abigail Byrne	29/03/2010	Next Booking: 27/04/2022 14:00 AWST Squad Beginner at Training Town

Facility:  Course:  Booking Type:

People

Saturday  
10:00 KCB4 from 30/04/2022 Student: 4

Start Date: 02/05/2022

**Select Packages**

Abigail Byrne:  
Term Based pricing: \$180.00 per term (9 sessions)

Duncan Pena:  
Term Based pricing: \$180.00 per term (9 sessions)

Customer Notification:  
Notify Customer

Customer will be notified only if appropriate events are setup.

Proceed »

POWERED BY U

Udio

Created 2 purchases

### Created bookings

**People**

[Abigail Byrne](#)

[Duncan Pena](#)

**Sessions**

02/05/2022 08:00	AWST Term-based Level 1 at Term Based
09/05/2022 08:00	AWST Term-based Level 1 at Term Based
16/05/2022 08:00	AWST Term-based Level 1 at Term Based
23/05/2022 08:00	AWST Term-based Level 1 at Term Based
30/05/2022 08:00	AWST Term-based Level 1 at Term Based
06/06/2022 08:00	AWST Term-based Level 1 at Term Based
13/06/2022 08:00	AWST Term-based Level 1 at Term Based
20/06/2022 08:00	AWST Term-based Level 1 at Term Based
27/06/2022 08:00	AWST Term-based Level 1 at Term Based

POWERED BY U

## 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)

Udio

Dashboard
People
Sessions
Waiting List
POS
Issues
Operations

## People Search

Facility:
Future Bookings:
Last Attended Booking after:
Last Attended Course:

Person Details:

Search

Dalene Guel
Verity Lindsay
Ced Dunkley
Jose Kallas
Henry Harold
Helena Morley
Louise Hale
Carla Hale
Olive Daly
Fred Franklin

Name	Card ID	Date of Birth	Next Booking	Facilities
Betty Nicosia		01/02/2015	27/04/2022 10:00 AWST Term-based Level 1 at Term Based	

Udio

Dashboard
People
Sessions
Waiting List
POS
Issues
Operations

## Billing Account

View Activity
View Billing Account

Current Balance
\$0.00

Active Purchases
Babies, CWG1 Babies 2 Sunday 10:30, Training Town
Next charge on: 01/05/2022

Term Based pricing, SHFA Term-based Level 1 Wednesday 10:00, Term Based
Next charge on:

Betty Nicosia has no vouchers
Add

Notes
No notes.
Add Note

Question answers
No answers recorded.
Answer

Udio

Dashboard
People
Sessions
Waiting List
POS
Issues
Operations
Reports
Settings

## Payment Method

Unavailable
Manage

Active since:
29/07/2020

## Vouchers

Add New
View All

No vouchers available.

## Purchases

Add New Purchase
Add New Charge

Name	For	Created	Active	Last charge	Next charge
Babies, CWG1 Babies 2 Sunday 10:30, Training Town	Betty Nicosia	04/02/2022	✓	01/04/2022	01/05/2022
Term Based pricing, SHFA Term-based Level 1 Wednesday 10:00, Term Based	Betty Nicosia	29/07/2020	✓	25/04/2022	



**Udio**

**Add Charge**

This form allows to charge billing account directly, without processing purchase. This method of charging is not recommended.

Charge value (including tax):  
-105.80

Values must be negative

Net value (without tax):  
-95.22

Tax value:  
-10.58

Leave empty for tax-free charges.

Description:  
Transfer of debit from legacy system

Person:  
Betty Nicosia

Facility:  
Term Based

Category:  
Learn To Swim

**Confirm** ← Go back

## 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**

**Billing Account** 2h69a9qg [Re-Charge](#)

CURRENT BALANCE  
**\$0.00**

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

**Recent activity**  
[View All Activity](#)

**People** [Add person](#)

- Dalene Guel** [emergency contact](#) [responsible person](#) [family bill payer](#)
- Julie Guel** [family](#) [Babies - 51A7 Babies 2](#) [Thursday 13:00, Training Town](#)
- Miguel Guel** [family](#)

**Credits**  
No credits.

**Notes** [Add New](#)  
No notes.

Udio

Dashboard

People

Sessions

Waiting List

POS

Issues

Billing Account: 2h69a9qg | Dalene Guel

Add Credit

Value:

50.00

Description:

Transfer from legacy system

Person:

Dalene Guel

Facility:

Training Town

Confirm

← Go back