

UPGRADE Checklist for Current Users of V1

- www.hallmaster.co.uk - 01929 509846 -

Please make sure you go through each of these sections in your account in turn to ensure your account in the new version is complete. Please note too that we are very happy to go through this with you on the phone too.

Essentially the main differences are in stability, security and flexibility of the new system. All your Customers are held in one place and any bookings and invoices linked to them. They can have many Activities and Rates assigned to them and with the use of the different Hire Charge Rates, either set as hourly or fixed rates, these are calculated automatically.

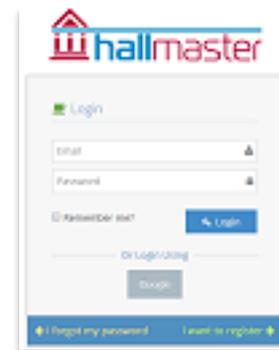
Customers also have access to view (but not amend) their Bookings and Invoices and any Payments too, similar to a shopping cart where you can see your purchases.

Administrators now have roles and permissions assigned to them too which gives more flexibility and the overall design means that you can almost instantly sort and filter information.

1. SECURITY

As a major part of the upgrade, we have enhanced the security of all user accounts throughout. This means that we will be issuing each registered user a new, unique password that must be used with their own email address when you see the new login panel. Once logged in to the new system, the password can be changed back to your original one if you wish, but it must have at least 6 characters, one capital letter and a number.

WE STRONGLY RECOMMEND THAT ACCOUNT LOGINS ARE NOT SHARED.



2. Admin > Manage Hall

Make sure your Hall details are up to date. You can now include additional items on your online booking form if you wish by ticking the relevant boxes for Alcohol, TENS & PRS Licences.

3. Admin > Administrators

For security reasons, we strongly recommend that you now have a separate login account for each user. You will also be able to set Admins to 'View Only' if required.

4. Admin > Charges Rates

New function that allows you to enter different Room or Facility Rates, and is an integral part of the Invoicing Module if used. You just need one rate name that will cover each Room or Facility. Eg. Standard Rate, Commercial Rate etc. You can also now set rates as an *Hourly* amount or a *Fixed* amount. These will be applied to each room. If not being used, this will be used as a good reference point for your customers.

5. Admin > Rooms/Facilities

Make sure your Room or Facility details are up to date including opening times and if you don't take bookings using our calendar, make sure you tick the disabled box for each room or facility

6. Admin > Activity Groups

Formerly 'Booking Types' this is now made into groups eg Classes, Meetings. These are still linked to your customers, but you can now add more details in each Customer account. Eg. Classes > Pilates Class which in turn can produce more detailed reports

7. Admin > Additional Line Item Groups (if using the Invoicing Module only)

Formerly 'Line Items' You can set up a few generic groups such as General Hire Items, Licences etc. Within these groups you can then have individual line items such as Deposits, Cancellation Fees, Table Hire, Chair Hire, or Alcohol Licence, PRS Licence etc with a rate for each one. These will still appear in the drop down menu in the Invoicing page but should **not** be confused with your Room & Facility Hire Charges.

8. Customers

You can now manage your customers more efficiently. Apply different Room/Facility charges to each customer, and the activity they do. This will enable you to automatically calculate Customer. Each new Customer will need to register themselves with you when making a booking request, and this will then allow them to see their bookings, invoices and payment history (if enabled). **Note: We will extract your existing Customers for you, send over a spreadsheet with them listed for you to check and 'clean' and add their relevant Activity Group, Activity Name and Hire Charge Rate. Once we have received that back, we can quickly import them for you into your new account.**

9. Bookings

We are leaving the old V1 available for you to reference your current and historical bookings and once your account in the new system is setup completely you can enter your future bookings straight away. You will also see faster creation of regular bookings plus edit individual bookings in a series, including changing dates, times and rooms if required. Note, bookings are now linked to your customer list meaning you can quickly add them to a booking using the 'lookup' facility. This automatically enters their activity too for you. You can still edit bookings directly from the brand new diary using the 'pencil icon'.

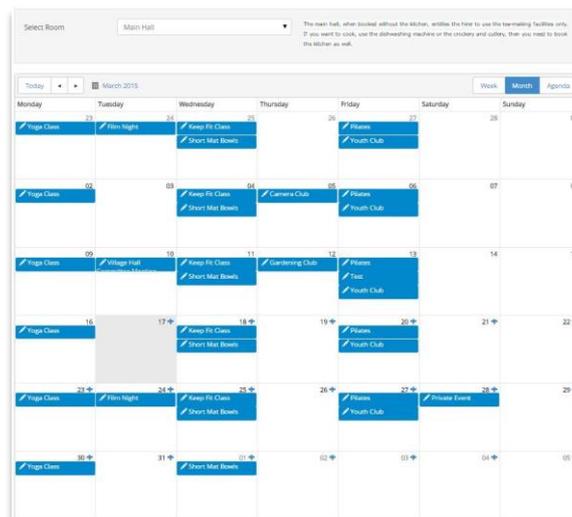
10. Invoices (Invoicing Module only)

The journey to create and amend invoices is still very similar with a couple of shortcuts. There is a better layout that automatically includes the customer details, and when you select the date(s) you want included in the invoice, it *automatically calculates* the hire charges according to the rate set against the customer and their activity, for the time used. You can now also override those prices before applying them to the invoice if you need to.

VAT – if you are VAT rated and you have enabled this in the Manage Hall page, then VAT will be applied at 20% to your invoices

11. Go 'Live' with the V2

- Inform your Customers and send them a Password link so that they can view and make their own bookings.
- Integrate the new system into your website. Check out the new look calendars and scheduler. It now allows you to toggle between daily, weekly, monthly and 'events' views plus sort views by room view too. Easily disable the 'Allow Booking Requests from the Calendar' function for individual rooms if required.



Please Note: We have done everything possible to setup your account in the new system for you, however because of the complexity of the new Hallmaster V2 it has not been physically possible to put everything across, hence you still having access to the old version. We will help you get your new account up to speed as quickly as possible so that once you are confident of using the new system and it is up to date with your future bookings, you will be in a position to switch over fully and integrate it into your own website.
