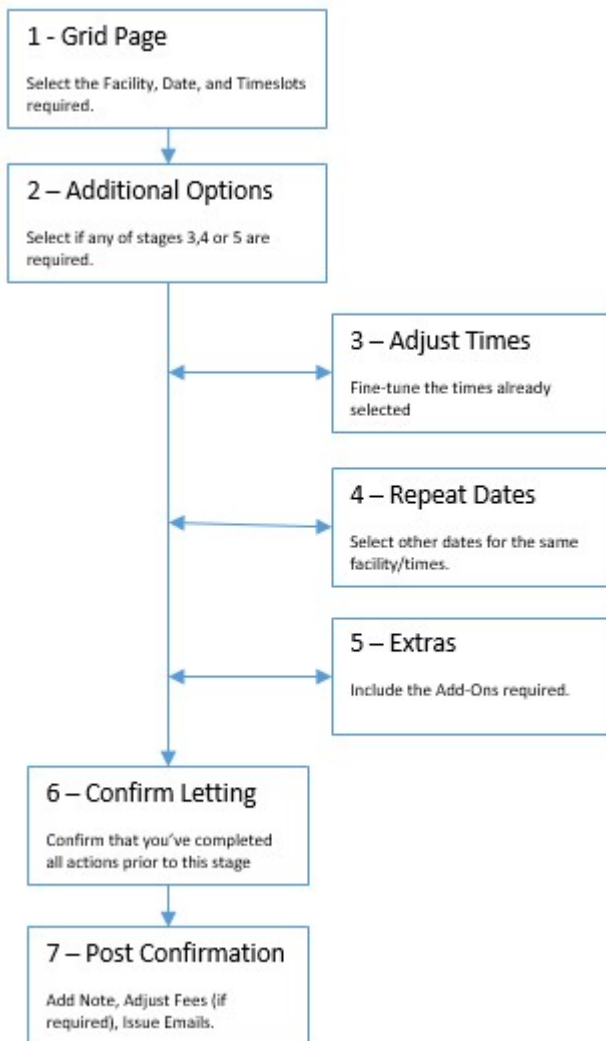


# Logging a new Reservation

The full letting process follows this structure....



Note that three of the seven stages can be skipped completely if they are not required. Of the remaining four stages, two of them often involve little more than a single mouse-click.

The following pages cover each stage in detail.

## Stage 1 – The Grid Page

Please note that the grid page is the central hub of the Lettings System and can be used for much more than just logging a new reservation. Therefore, this guide does not go into every single option that is available here.

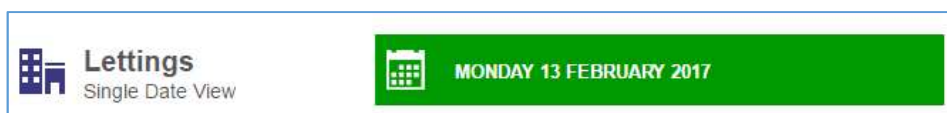
For a more detailed overview of the grid page's features, please follow the separate guide 'The Lettings Grid'.

This first stage of the reservation process involves...

- i) Selecting a date.
- ii) Selecting a facility.
- iii) Selecting the required timeslots.

For the purposes of this guide, we will be using Date View where the main display lists multiple facilities that are available on a single date. The alternate Facility View works in a very similar way but instead lists a single Facility over multiple dates.

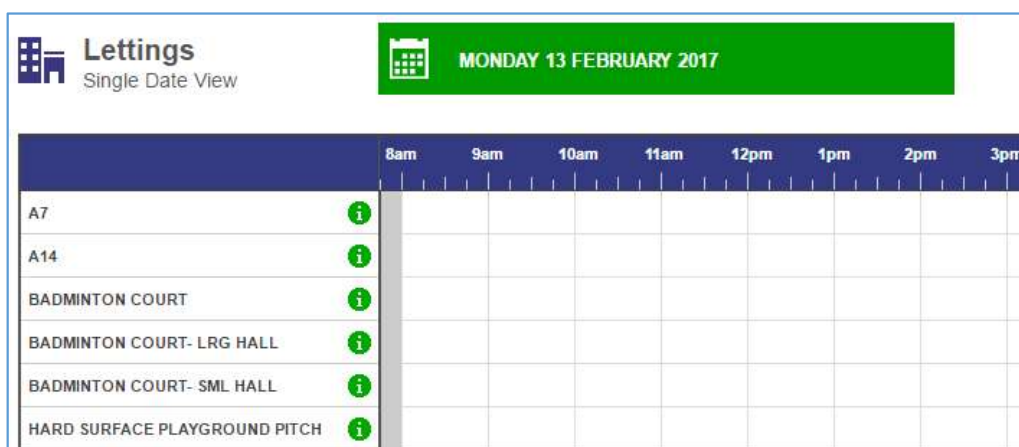
At the top of the page is a large green box confirming the date currently on display.



If a different date is required, click that box to access the Change Selection options.

Once the required date has been set, the main area of the display can be used to check the availability of your facilities.

Each row represents a single facility with its name listed on the left of the page. The larger area to the right breaks down the available times of the day into individual timeslots.

The image shows the main grid area of the Lettings system. At the top, there is a header with the 'Lettings Single Date View' logo and a green box with a calendar icon and 'MONDAY 13 FEBRUARY 2017'. Below this is a table with a dark blue header row for time slots: 8am, 9am, 10am, 11am, 12pm, 1pm, 2pm, and 3pm. The table rows list facilities: A7, A14, BADMINTON COURT, BADMINTON COURT- LRG HALL, BADMINTON COURT- SML HALL, and HARD SURFACE PLAYGROUND PITCH. Each facility name has a small green circle with an 'i' icon to its right. The grid cells are currently empty, indicating no reservations are shown for these facilities on this date.

On the applicable row, click on the slot(s) that you require.

For example: Here we've selected the two hourly slots between 9am and 11am for Room A14.

	8am	9am	10am	11am	12pm	1pm
A7						
A14		■	■			
BADMINTON COURT						
BADMINTON COURT- LRG HALL						

At the bottom of the page you will now see confirmation of the Facility and Times selected. If you are happy that all required slots have been included, click on the Proceed button to move on to Stage 2 of the process.



### Tips

If you plan on repeating the letting over several dates (same facility, same times), on this page you should select the earliest of those dates.




Do not be concerned if the times of the slots do not match your exact requirements. For now, select the slots that give the closest match and the start/end time can be adjusted at the next stage.

## Stage 2 – Additional Options

By this point you have selected a single facility on a single date with times covering a full timeslot(s).

If that is exactly what you were after, you can skip Stages 3,4,5 and go straight to the Confirmation page.

If, however, you would like to fine-tune the times selected, select multiple dates, or include any Extras in the reservation, click on the applicable boxes here before Proceeding.

 Adjust Letting Times	<b>Adjust Times</b> Your letting currently covers the times 9am to 11am. If selected, this option will enable you to fine-tune those times to closer match your requirements.
 Repeat On Other Dates	<b>Repeat Dates</b> Your letting currently covers the single date of Monday 13 February 2017. Select this option if you wish to repeat this letting (same facility, same times) on other dates.
 Optional Extras	<b>Optional Extras</b> Select this option to view/select the 'add-ons' that are available with your selected facility.

### Stage 3 – Adjust Times

If the slots selected on the grid page do not cover the exact times needed, this page enables you to adjust those times to more closely match your requirements.

Using the example at Stage 1, we reserved the slots for 9am to 11am. The real times we wanted though are 9:30am to 11:15am.

This page breaks down the entire day down into 5 minute 'mini-slots'.

These mini-slots will show as green for the times already selected and white for those that weren't (but are still available).

The screenshot shows a time grid interface. The top header has time markers at 8:30am, 9am, 9:30am, 10am, 10:30am, 11am, and 11:30am. Below this is a grid of 5-minute slots. Slots from 9:00am to 11:00am are highlighted in green, indicating they are selected. Slots from 8:30am to 9:00am and from 11:00am to 11:30am are white, indicating they are available. Below the grid is a horizontal scrollbar. To the right of the grid are three buttons: 'Select All', 'Clear All', and 'Undo Changes'. Below these buttons is a legend with three items: 'Available' (white square), 'Unavailable/In Use' (grey square), and 'Selected' (green square). At the bottom left, there is a box titled 'NEW TIMES SELECTED' containing the text '9am to 11am'.

To change the current start time of 9am over to 9:30am, click on the first six green slots so that they turn white. To add an extra 15 minutes to the end time, click on the first three white slots after 11am to turn them green.

The display now looks like this...

The screenshot shows the same time grid interface as before, but with adjustments. The green slots now start at 9:30am and end at 11:15am. The first six green slots from the previous screenshot are now white, and the first three white slots after 11:00am are now green. The 'NEW TIMES SELECTED' box at the bottom left now displays '9:30am to 11:15am'. The legend and control buttons remain the same as in the previous screenshot.

When ready, click Proceed to move onto the next stage.

## Stage 4 – Repeat Dates

Should the reservation need to cover more than one date (same facility, same times), this page will show the availability of all dates over a 12 months period, starting with the month of your initial selection.

The screenshot displays five monthly calendars for February, March, April, May, and June 2017. Each calendar has days of the week (M, T, W, T, F, S, S) as headers. The dates are color-coded: light green for available, dark green for selected, grey for unavailable, and white for not applicable. A legend below the calendars defines these colors: light green for 'Available', dark green for 'Selected', grey for 'Unavailable', and white for 'Not Applicable'. There is also a 'Quick Set' button and an 'Undo Changes' button. A scroll bar is visible above the legend.

The currently selected date will be highlighted in a dark green.  
Other dates that are available for selection will show in a light green.

To add other dates to this reservation, simply click on each one to turn them dark green (click again if you selected a date by mistake).

The close-up screenshot shows the February 2017 calendar. The days of the week are M, T, W, T, F, S, S. The dates are color-coded: light green for available, dark green for selected, grey for unavailable, and white for not applicable. The 15th is highlighted in dark green, indicating it is the currently selected date. Other dates like the 1st, 2nd, 3rd, 4th, 5th, 6th, 7th, 8th, 9th, 10th, 11th, 12th, 13th, 14th, 16th, 17th, 18th, 19th, 20th, 21st, 22nd, 23rd, 24th, 25th, 26th, 27th, and 28th are highlighted in light green, indicating they are available for selection.

Should you have a large number of dates to include, note the Quick Set button below the calendars. If there is a regular pattern to the reservation (e.g. every Monday for the next nine months), using this option may prove to be the faster method.

As your selections change, the total number of dates included will be displayed at the very bottom of the page.

The screenshot shows the bottom navigation bar. It contains a green button with a left arrow and the text 'BACK', the text 'Total dates selected = 3' in the center, and a green button with a right arrow and the text 'PROCEED'.




Once all the required dates have been selected, click Proceed.

## Stage 5 – Optional Extras




Depending on the Facility’s letting plans (in the Administration area of the system), there may be ‘add-ons’ that can be included to the reservation. Typical examples could be tea/coffee for the Meeting room, or badminton rackets for the Sports Hall.

This page lists all extras available to the selected facility.

In our example, Room A14 has three different extras available... 3 laptops, 20 iPads, and a portable projector.

Resource		Category	Maximum Quantity	Available Quantity	Selected Quantity
Laptop		General	3	3	<input type="text" value="0"/>
Portable data projector		General	1	1	<input type="text" value="0"/>
Silverhill iPads		iPads	20	20	<input type="text" value="0"/>

To include one or more of these items in the reservation, click on the final column for the applicable row.

Resource		Category	Maximum Quantity	Available Quantity	Selected Quantity
Laptop		General	3	3	<input type="text" value="0"/>
Portable data projector		General	1	1	<input type="text" value="1"/>
Silverhill iPads		iPads	20	20	<input type="text" value="0"/>

If the Available Quantity is 1, no further action is required, it has already been selected.

If the Available Quantity is greater than 1, you will then be asked how many are required.

## Stage 6 – Confirm Letting

By this stage, the system has enough information to be able to log the reservation.

Before moving on, you should check the details displayed carefully as this will be the last opportunity to revisit Stages 2 to 4.

### Confirm Reservation

Date	Times	Item	Quantity	Total Fee
Monday 13 February 2017	9:30am to 11:15am	A14	1	£57.75
Monday 13 February 2017	9:30am to 11:15am	Portable data projector	1	£27.50
Monday 20 February 2017	9:30am to 11:15am	A14	1	£57.75
Monday 20 February 2017	9:30am to 11:15am	Portable data projector	1	£27.50
Monday 27 February 2017	9:30am to 11:15am	A14	1	£57.75
Monday 27 February 2017	9:30am to 11:15am	Portable data projector	1	£27.50
<a href="#">To view a more detailed breakdown of the letting fees, click on the applicable row in the table above</a>				<b>£255.75</b>

Hirer:

Please note that the fees displayed here are just for information purposes. If required, you will get the opportunity to adjust them at the next stage.

Also on this page is confirmation of the hirer that the reservation is to be assigned to. This may already have been set at an earlier stage. If not, use the drop-down field to select the correct account.

Once you click Confirm....

- i) The letting(s) will now be logged in the system. This will avoid the possibility of another hirer/booker grabbing the same slots before you've completed the final tasks.
- ii) You will still have the opportunity to.... i) Add a booking note, ii) Adjust the system-calculated fees, iii) issue the relevant email notifications.

## Stage 7 – Post Confirmation


Although the lettings have now been logged, it is likely that at least one of three further options will still be required.


Technically, these do not need to be actioned immediately as all three options are also available elsewhere in the system (specifically the Manage Lettings area). However, things will be far simpler if these actions are completed from here as there will be no need to later track down the applicable lettings yourself.


Date	Times	Item	Quantity	Total Fee
Monday 13 February 2017	9:30am to 11:15am	A14	1	£57.75
Monday 13 February 2017	9:30am to 11:15am	Portable data projector	1	£27.50
Monday 20 February 2017	9:30am to 11:15am	A14	1	£57.75
Monday 20 February 2017	9:30am to 11:15am	Portable data projector	1	£27.50
Monday 27 February 2017	9:30am to 11:15am	A14	1	£57.75
Monday 27 February 2017	9:30am to 11:15am	Portable data projector	1	£27.50
				£255.75

The above lettings have now been logged in the system.

Clicking NEXT will take you to the Email Notifications page to fully complete the process.  
If required, first please add a freetext note and/or amend the system calculated fees.

 **Add a freetext note**

 **Amend the Letting Fees**

**NEXT** 

[Cancel/Delete this reservation](#)

The table at the top of the page continues to show the details of the applicable lettings.

Further down, you also now have the options to...

- Include a freetext note (the booking note).
- Adjust the system-generated fees.

Alternatively, you can just cancel the whole reservation and return to the grid page.

*Tip: Unlike a cancellation logged in the Manage area of the system, cancelling here will immediately delete all traces of the letting ever existing.*

When ready, you can move on to the final page of the process... issuing the Email Notifications.



After completing the Email Notification page, you will see this display asking which part of the system you now want to visit.

## Reservation Complete

Your reservation has been logged and the applicable email notifications issued. Where would you like to go next...

[Return to the Lettings Home Page](#)

[Go to the Manage area for this reservation](#)

[Return to the Lettings Grid](#)

[Go to the hirer's "Payments & Invoicing" page](#)

The options on the left are hopefully self-explanatory. The two on the right may occasionally be of use...

### Manage Area


Although you are able to visit the Manage page for this letting at any time, selecting it here bypasses the need to find/select it first in the full list of reservations.


At present, it is unlikely that you will need to do this straight away. The one option not already covered during the make a reservation process is 'Add to Calendar' and there is now a quicker/better way of achieving the same end result automatically - see Optional Settings in the Administration area of the system for further details.

### Payments & Invoicing Page

The final option may be a slight timesaver if you need to invoice the hirer immediately. Rather than having to visit the Payments & Invoicing area via the Home page and then selecting the hirer, the option here will take you straight to the applicable hirer's page.

When you return to the main grid page, you will now see your new reservation in the display.

**Lettings**  
Single Date View

 **MONDAY 13 FEBRUARY 2017**

	8am	9am	10am	11am	12pm	1pm	2pm
A7							
A14			Letting				
BADMINTON COURT							
BADMINTON COURT- LRG HALL							