

Instant Leisure

**SET UP AND OPERATIONS MANUAL
TO BE USED IN CONJUNCTION WITH
INSTANT LOYALTY**



Contents

Instant Leisure Admissions Server	3
Setup	3
General Options	3
Activity Reporting	4
Points On Entry	4
Membership Plug-in Guide	5
Membership Type's Setup	5
Renewing A Membership	6
Renewing A Batch of Members	6
Security Options	7
Instant leisure Operations Guide.....	8
Updating/Creating Image	8

Instant Leisure Admissions Server

The Instant Leisure Admissions Server is the Customer Interface for Instant Leisure. This accesses the database to provide the entry system. The system utilizes a keyboard wedge magnetic stripe card reader. The customer/member swipes his or her card through the card reader which then display their photograph and details on the admissions screen.



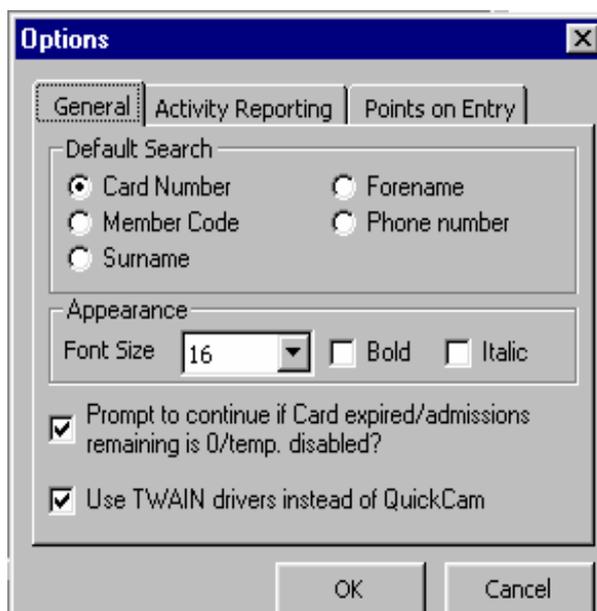
The customer information displayed, is customisable using the Field Security option found within Instant Loyalty.

An audit trail of actions involving that member is also displayed at the bottom of the screen. Here you can Admit or Decline entry and also update the photograph if required.

Setup

Clicking the options button on the Admissions server allows access to three options menus. Here you can setup General Options, Activity Reporting and Points on Entry.

General Options



In the General options you can change the default Search. This enables you to be able use the system without a card swipe using surname or telephone number for example.

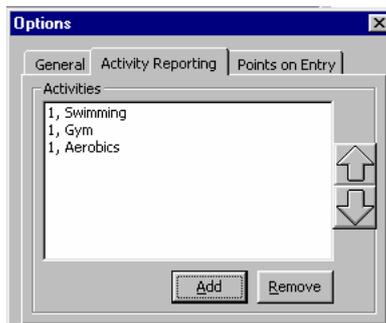
You can also change the Appearance by changing the Font characteristics. This changes the font that the customer details are displayed in.

You can choose whether you want to allow a temporarily disabled card to gain entry at the

operators' discretion. If this box is checked, when a temporarily disabled card is swiped, the operator is presented with the option to continue and be able to allow that member entry. If the box is unchecked the member cannot be admitted without their card being renewed.

The use a twain camera option allows you to use any twain device to input pictures onto the system. As default a Logitech Quickcam driver is built into the system, supporting the full range of Logitech QuickCam web cams.

Activity Reporting



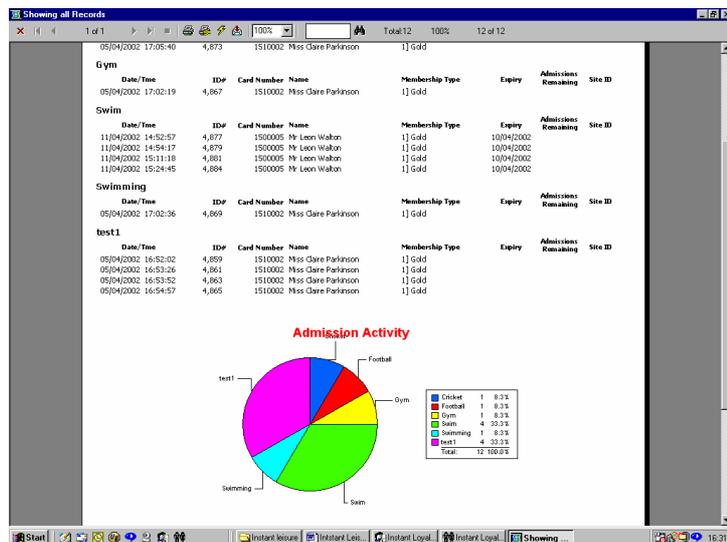
Activity Reporting is used to monitor what activity an individual is entering the premises to do. When the customer is admitted, another screen is displayed asking the operator what activity the customer is entering to do.

An example of this is in a Leisure centre where a member may be able to choose from swimming, gym, and Aerobics.

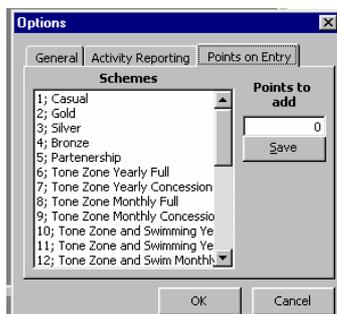
You can then determine what proportion of members entering the premises use which activity type. This information is located in the reporting section of Instant Loyalty.

This report displays a detailed audit of which members are using which facilities.

The report is accessed from within the Instant Loyalty software reporting section. Select the Admissions Report to run the report. You can filter this report by date range allowing information to be accessed for a specific period, i.e. weekly, monthly report.



Points On Entry



Points on Entry, is used to give points to the customer when they are admitted. This allows the Instant Leisure system to be used in conjunction with a loyalty system. The points are setup by scheme, allowing different amounts of points to be awarded for different schemes.

Points are redeemed either by issuing a voucher, or by having a compatible cash register linked to the system.

Membership Plug-in Guide

The Membership Plug-in is located in the Total Loyalty package. It is found at the bottom of the action list that is accessed by 'right clicking' on the customer database screen.

Record a note against this member View Notes History View Letters Sent to this member View Statement
Assign a new card number Remove a card assigned to this member Disable a card or cards Enable a card or cards
Re-Value customers balance Re-Value all customers in viewer Adjust points for member(s)
View Current record Edit Current record
Issue Voucher(s) Send SMS Text Message
Renew Expiry date

This plug-in allows memberships types to be assigned to a member allowing expiry dates and 'numbers of admissions' to be setup.

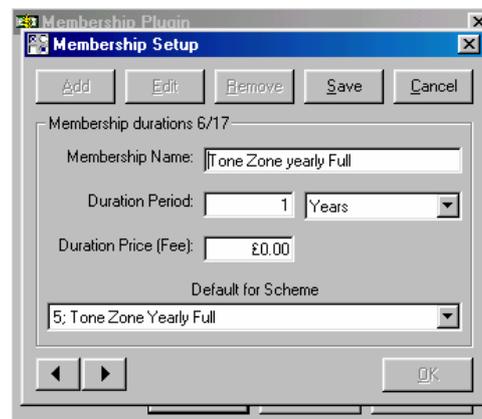
If the Member has more than one card you will be asked which of the cards you wish to update. Double click on the card you wish to update.

Membership Type's Setup

Clicking on the setup button brings up the Membership Setup screen. Here you can setup different membership types based on a variety of options.

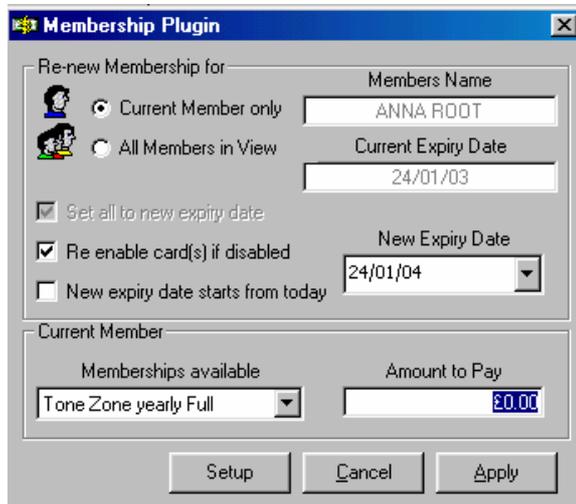
You can select the duration of the membership by days, weeks, months, and years. You can also set a price for the membership scheme.

The Membership Type can be linked to a membership scheme so that if a member is in a particular scheme the Membership type defaults that Membership Type if they do not have a default membership type when they come to renew it.



Renewing A Membership

From here you setup the membership types and renew memberships.

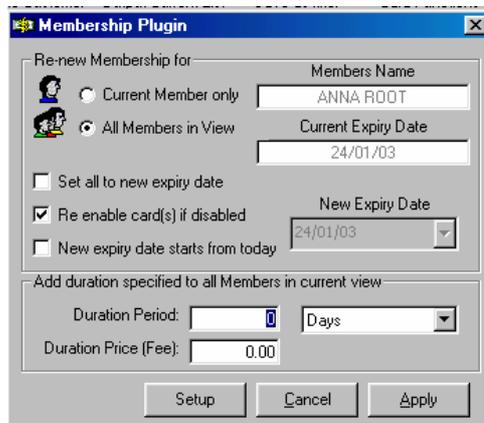


The screenshot shows the 'Membership Plugin' dialog box. It has a title bar with a close button. The main area is divided into sections. The top section is 'Re-new Membership for' with two radio buttons: 'Current Member only' (selected) and 'All Members in View'. To the right are text boxes for 'Members Name' (ANNA ROOT), 'Current Expiry Date' (24/01/03), and 'New Expiry Date' (24/01/04). Below these are three checkboxes: 'Set all to new expiry date' (checked), 'Re enable card(s) if disabled' (checked), and 'New expiry date starts from today' (unchecked). The bottom section is 'Current Member' with a dropdown for 'Memberships available' (Tone Zone yearly Full) and a text box for 'Amount to Pay' (£0.00). At the bottom are 'Setup', 'Cancel', and 'Apply' buttons.

To renew a membership you need to select the type of membership required. This will adjust the new expiry date based on the current expiry date (or today's date if there is no current expiry date). If you wish the new expiry date to be based on today's date instead of the current expiry date check the New Expiry Date Starts From today box. As a default the membership type displays the default membership type for that member. When you

have made the changes you require click on the Apply button. You will then be asked if you wish to set the scheme as the default for that member.

Renewing A Batch of Members



The screenshot shows the 'Membership Plugin' dialog box. It has a title bar with a close button. The main area is divided into sections. The top section is 'Re-new Membership for' with two radio buttons: 'Current Member only' (unchecked) and 'All Members in View' (selected). To the right are text boxes for 'Members Name' (ANNA ROOT), 'Current Expiry Date' (24/01/03), and 'New Expiry Date' (24/01/03). Below these are three checkboxes: 'Set all to new expiry date' (unchecked), 'Re enable card(s) if disabled' (checked), and 'New expiry date starts from today' (unchecked). The bottom section is 'Add duration specified to all Members in current view' with a 'Duration Period' text box (0), a 'Days' dropdown, and a 'Duration Price (Fee)' text box (0.00). At the bottom are 'Setup', 'Cancel', and 'Apply' buttons.

To renew a batch of members you first need to apply (or create and apply) an appropriate filter. This may be to select people by their expiry date, or membership type. Once you have filtered down the members right click on ANY member and enter the Membership Plug-in.

The bottom section of the membership plug-in changes. This is because you cannot change the membership type of a batch of members, only change the expiry dates. You can set all members to a specific date, or you can add a time period onto their current expiry date.

To set all members to a specific date, check the Set To New Expiry Date flag and enter the date required in the new expiry date box.

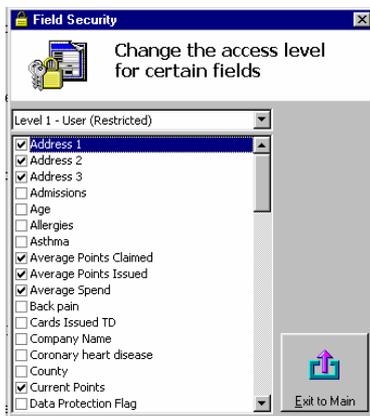
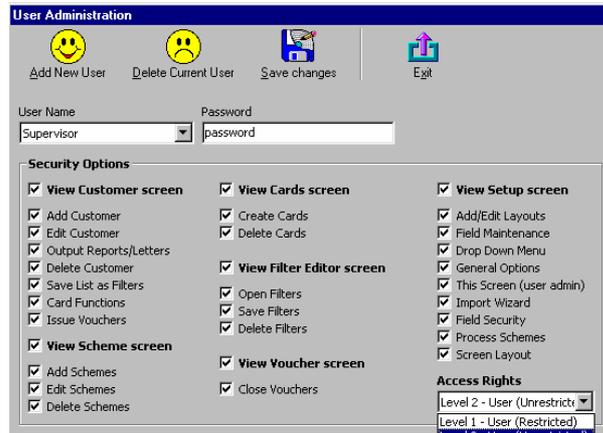
To add a duration specified to all members, enter the duration period and the fee if applicable.

When you have finished click on the apply button to apply the changes made.

Security Options

A new feature in the User Administrator option is Access Rights.

This is located in the bottom right hand corner of the menu. This is used to define which fields a user can view. For example, reception staff would not be able to access medical records, but supervisors and managers can.



To setup the fields that can and cannot be viewed you use the field security option off the Setup / Maintenance menu.

Here you select the Access Level that you wish to change and select the fields that you wish to be viewed/edited by that particular access level. The Admissions Server uses Access level 1 (restricted) to determine what to display when a card is swiped.

Instant leisure Operations Guide

- 1 Ensure Instant Loyalty Admission Server is running (on the screen)
- 2 Ask the Customer to swipe their card through the card reader.
- 3 If notes appear read notes and take appropriate action.
- 4 Check picture to see if the card matches the customer (Click mouse on picture to zoom if necessary)

5 If everything is OK Press the F1 key on the keyboard or click the Admit button with the mouse.



6 If there is a problem press the F2 key or click on the decline button with the mouse.



7 If the customer has been declined you will be asked to enter a reason for declining the customer entry

Updating/Creating Image

If the member does not have a picture assigned to them or they wish to have their picture updated follow these steps.

- 1 Click the Update button or press F3 on the keyboard.
- 2 Ensure the customer is standing in front of the camera.
- 3 Click on the Take Picture button or Press the F2 key to take the picture.
- 4 If you are then happy with the picture click on the Accept Picture Button or press the F1 key to accept the picture.
- 5 If you are not happy and wish to revert to the original Picture click the Cancel Picture button or press F9 to return

