

# Manage attendees for bookings

This is the user guide for the bookings feature in the **iconnect360 standard** version.

I want to...

- [Add attendee](#)
- [Promote from the waiting list to the attendee list](#)
- [Process payment](#)
- [Waive payment](#)
- [Refund payment](#)
- [Remove attendee](#)
- [Remove from the waiting list](#)
- [Mark attendance](#)
- [Print/save the attendee list](#)

## Add attendee

1. At the Site level, select **Bookings > Calendar** from the left menu.
2. Select the required booking in the calendar.
3. Select **Add Attendee**.

**10 visit Gym Package**  
 10 visit gym package  
 Occurs every day, effective 7/11/2014 from 9:00 AM to 10:00 AM, ends on 31/12/2014.

Attendees   Details   Waiting   Signup Link

Name	Payment Status	Amount	Attendance	Actions
Aaron D	Overdue	\$16.00	No	Pay Write Off ⚙️
Gan B	Overdue	\$16.00	No	Pay Write Off ⚙️
Gan C	Paid	\$16.00	No	Refund ⚙️
Shang L	Future	\$16.00	No	Pay Waive ⚙️

4. A drop-down list appears.
  - Select **Add new customer** if you want to add a booking for a new customer.
  - Select **Add existing customer** if you want to add a booking for an existing customer.


**i** If you have selected a prospect to be added to the booking, the system will bring you to the **Convert To Customer** page. You need to convert the prospect to customer first before you can proceed to make a booking.

  - If you want to add an attendee to the waiting list, select **To waiting list**. This feature is only for Standard version.
5. If you select **Add new customer**, follow the instructions in [How do I add a new customer?](#). If you select **Add existing customer**, go to next step.
6. In the *Attendee Lookup* pop-up window, select the person's name.

### Action results:

- The person will be added to the booking.
- The booking(s) will be listed in the *Booking* tab of the person's page.
- If payment is required for this booking and the person has purchased a package for this booking, the *Pay With Credit* window will pop-up asking if you want to process the payment with credit.
  - If you want to deduct the person's credit as payment, select **Yes**.
  - If you do not want to process the payment by credit at this point of time, select **No**.

- If you have selected a name that is already listed in the waiting list, a pop-up window will appear asking if you want to promote the person to the attendee list.
    - To move the person from the waiting list to the attendee list, select **Yes**. The person will be added to attendee list and removed from its waiting list. The booking will be listed in the *Booking* tab of the person's page.
    - If you select **No**, the person will remain in the waiting list and not added to the attendee list.
7. Select **Close** to close the calendar booking.

 When you have reached the maximum number of attendees, you will only be able to add attendee to the waiting list.

## Promote from the waiting list to the attendee list


If places are available on the attendee list, you can simply move a person from the waiting list to the attendee list.

1. At the Site level, select **Bookings > Calendar** from the left menu.
2. Select the required booking in the calendar.
3. Select the **Waiting** tab.
4. Select **Promote** for the person you wish to move to the attendee list.
5. In the pop-up window, select **Yes**.

Action results:

- The person will be added to the attendee list and removed from its waiting list.
- The booking will be listed in the *Booking* tab of the person's page.

6. Select **Close** to close the calendar booking.

 If you wish to move a person from the attendee list to the waiting list, first remove the person from the attendee list and then add the person to the waiting list.



## Process payment

Payment can be made before or after the booking session has occurred. There are two ways to do so.

- Process payment via the calendar booking
- Process payment via the person's record page

### Process payment via the calendar booking

1. At the Site level, select **Bookings > Calendar** from the left menu.
2. Select the required booking in the calendar.
3. Select **Pay** for the attendee.

Name	Payment Status	Amount	Attendance	Actions
Arthur Longhurst	● Overdue	\$16.00	Yes 	<b>Pay</b> Write Off 



- You will see the *Payment* pop-up window with the items breakdown and amount due. If you select the **Pay now in till** option, you will be directed to the *POS Sales* page to process the payment.

Or

- If the person has purchased a package for this booking, the *Pay With Credit* window will pop-up asking if you want to process the payment with credit.
  - To deduct the person's credit as payment, select **Yes** and then **OK**.
  - To process the payment at the till, select **No, pay at the till** and then **OK**. You will be directed to the *POS Sales* page to process the payment.

## Process payment via the person's record page

- At the Site level, select **Contacts > Customers**.
- Select the person's name.
- Select the **Booking** tab.
- If you do not see the desired booking session listed, select **Past sessions** or **Future sessions** to reveal more bookings.
- Select **Pay** for the desired booking session.

Booking Sessions				
Booking Time	Booking Status	Amount	Payment Status	Actions
9:00 AM - 10:00 AM 3/11/2014, Monday 	Attended	\$16.00	● Overdue	<b>Pay</b> Write Off 

- You will see the *Payment* pop-up window with the items breakdown and amount due. If you select the **Pay now in till** option, you will be directed to the *POS Sales* page to process the payment.

Or

- If the person has purchased a package for this booking, the *Pay With Credit* window will pop-up asking if you want to process the payment with credit.
  - To deduct the person's credit as payment, select **Yes** and then **OK**.
  - To process the payment at the till, select **No, pay at the till** and then **OK**. You will be directed to the *POS Sales* page to process the payment.

If payment is successful:

- In the calendar booking, the payment status for the attendee will be displayed as **Paid**.
- In the *Booking* tab of the person's page, the payment status for the booking session will be displayed as **Paid**.

## Waive payment

If a person has not paid for the booking (Payment status: **Future**), you can choose to waive the payment before or after the booking session has occurred. There are two ways to do so.

- Waive payment via the calendar booking
- Waive payment via the person's record page

### Waive payment via the calendar booking

1. At the Site level, select **Bookings > Calendar** from the left menu.
2. Select the required booking in the calendar.
3. For the attendee you wish to waive payment, select **Waive** in the *Actions* column.

Name	Payment Status	Amount	Attendance	Actions
Aaron King	● Future	\$10.00	No	Pay Waive ⚙

4. In the pop-up window, select **Yes**.
5. Select **Close** to close the *Booking* pop-up window.

### Waive payment via the person's record page

1. At the Site level, select **Contacts > Customers**.
2. Select the person's name.
3. Select the **Booking** tab.
4. If you do not see the desired booking session listed, select **Past sessions** or **Future sessions** to reveal more bookings.
5. For the booking you wish to waive payment, select **Waive** in the *Actions* column.

Booking Time	Booking Status	Amount	Payment Status	Actions
11:00 AM - 12:00 PM 19/10/2014, Sunday	Not attended	\$10.00	● Future	Pay Waive ⚙

6. In the pop-up window, select **Yes**.

Action results:

- In the calendar booking, the payment status for the attendee will be displayed as *Waived*.
- In the *Booking* tab of the person's page, the payment status for the booking session will be displayed as **Waived**.

## Refund payment

If a person has paid for the booking (Payment status: **Paid**), you will still be able to refund the payment before or after the booking session has occurred. There are two ways to do so.

- Refund payment via the calendar booking
- Refund payment via the person's record page

**i** If a person has been removed from the booking, the only way to process a refund is via the person's record page.

### Refund payment via the calendar booking

1. At the Site level, select **Bookings > Calendar** from the left menu.
2. Select the required booking in the calendar.
3. For the attendee you wish to refund payment, select **Refund** in the *Actions* column.

Name	Payment Status	Amount	Attendance	Actions
Aaron King	● Paid	\$10.00	No	Refund

4. Select the items or booking sessions to refund.
  - If the person has paid at the till, select **Refund in Till** or **Refund to ClubCash**.
  - If the person has paid with package credits, select **Refund Credit**.
5. Enter a comment and select **Confirm**.
6. For cash refund, you will be directed to the *POS Sales* page to process the refund at the till.

### Refund payment via the person's record page

1. At the Site level, select **Contacts > Customers** from the left menu.
2. Select the person's name.
3. Select the *Booking* tab.
4. If you do not see the desired booking session listed, select **Past sessions** or **Future sessions** to reveal more bookings.
5. For the booking you wish to refund payment, select **Refund** in the *Actions* column.

Booking Time	Booking Status	Amount	Payment Status	Actions
11:00 AM - 12:00 PM 19/10/2014, Sunday	Not attended	\$10.00	● Paid	Refund

6. Select the items to refund.
  - If the person has paid at the till, select **Refund in Till** or **Refund to ClubCash**.
  - If the person has paid with package credits, select **Refund Credit**.
7. Enter a comment and select **Confirm**.
8. For cash refund, you will be directed to the *POS Sales* page to process the refund at the till.

If refund is successful:

- In the calendar booking, the payment status for the person will be displayed as **Refunded**.
- In the *Booking* tab of the person's page, the payment status for the booking session will be displayed as **Refunded**.


## Remove attendee

There are two ways to remove an attendee from a booking.

- Remove attendee via the booking calendar
- Remove attendee via the person's record page

**i** All attendees are automatically removed if you remove the booking. For more details, see topic: [Manage bookings](#)

### Remove attendee via the booking calendar

1. At the Site level, select **Bookings > Calendar** from the left menu.
2. Select the required booking in the calendar.
3. For the attendee you wish to remove, select the **More Actions**  icon in the *Actions* column.

**10 visit Gym Package** x

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Attendees    Details    Waiting    Signup Link

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Shang L	Future	\$16.00	No	Pay Waive

Remove attendee from this booking

Remove attendee from this booking onwards

4. A drop-down list appears.
  - If you want to remove the attendee from this booking session only, select **Remove attendee from this booking**.
  - If you want to remove the attendee from all future bookings in the series, select **Remove attendee from this booking onwards**.

5. Depending on your attendee's payment status and scenarios, the following options are available:

**Scenario 1: If payment has been made, select the option to refund or not to refund.**

- **Refund in till now:** This option is available only if payment was made via the till.  
**Refund to ClubCash Account:** Customers can choose to put the amount into their cashless account for accumulated reimbursement or for future payments.  
See topic: [ClubCash](#) and [How do I refund to a paid credit?](#)
- **Refund Credit:** This option is available only if payment was made via package credit deduction.  
See topic: [See help articles for Packages](#)
- **Don't refund**

**Scenario 2: If payment is overdue or failed, select the option to remove payment or continue to collect payment.**

- **Remove payment for this booking (or booking series)**  
The attendee will be removed from this booking (or booking series). The payment status will be changed to "Removed". Any customer paid fees and outstanding amount would be reallocated to the principal. The fees include load fees, commissions, failed payment fees, and etc.
- **Continue to collect payment for this booking (or booking series)**  
The attendee will be removed from this booking (or booking series). The attendee needs to clear his/her outstanding payment. You can also choose to write off the attendee's outstanding balance.


**Scenario 3: If attendee has both paid and outstanding payments, select the option to refund or not to refund, and whether to remove payment or continue to collect payment.**

- Refund successful payments to ClubCash/Credits and remove outstanding payments.
- Refund successful payments to ClubCash/Credits and continue to collect outstanding payments.
- Don't refund but remove outstanding payments.
- Don't refund but continue to collect outstanding payments.

**Scenario 4: If the booking session is (a) Free, (b) Payment has not happened, or (c) Attendee has already been refunded, select Yes or No to remove attendee from this booking (or booking series).**












## Remove attendee via the person's record page

1. At the Site level, select **Contacts > Customers**.
2. Select the person's name.
3. Select the **Booking** tab.
4. If you do not see the desired booking session listed, select **Past sessions** or **Future sessions** to reveal more bookings.
5. For the booking you wish to remove for the person, select the **More Actions**  icon in the *Actions* column.



Booking Sessions

Future sessions ^

Booking Time	Booking Status	Amount	Payment Status	Actions
9:00 AM - 10:00 AM 10/11/2014, Monday 	Not attended	\$16.00	<span style="color: green;">●</span> Paid	<a href="#">Refund</a>  <div style="border: 1px solid red; padding: 2px; margin-top: 5px;">           Remove attendee from this booking            Remove attendee from this booking onwards         </div>
9:00 AM - 10:00 AM 9/11/2014, Sunday 	Not attended	\$16.00	<span style="color: green;">●</span> Paid	
9:00 AM - 10:00 AM 8/11/2014, Saturday 	Not attended	\$16.00	<span style="color: green;">●</span> Paid	<a href="#">Refund</a> 
9:00 AM - 10:00 AM 7/11/2014, Friday 	Not attended	\$16.00	<span style="color: green;">●</span> Paid	<a href="#">Refund</a> 
9:00 AM - 10:00 AM 6/11/2014, Thursday 	Not attended	\$16.00	<span style="color: green;">●</span> Paid	<a href="#">Refund</a> 

6. The rest of the steps are the same as steps 4 and 5 to remove attendee via the booking's attendee list.



### Action results:

- The person will be removed from the attendee list.
  - In the *Booking* tab of the customer's page, the booking's status will be displayed as *Removed*.
  - For till refund, you will be directed to the *POS Sales* page to process the refund.
  - For ClubCash refund, the amount will be added to the customer's ClubCash account displayed in their *Payments* tab.
  - For credit refund, the credit(s) will be added to the person's *Remaining Credits* amount for that package in their *Booking* tab.
  - If the attendee has an outstanding payment for the booking, the person will still have a billing issue status or message displayed on the customer's page. Go to the customer's page and select **Write Off**. Select **OK** to proceed with the write off.
  - All activities are captured in the customer record's *Timeline* tab.
-  If you did not proceed with the POS refund process or the refund was unsuccessful, the person will remain in the booking's attendee list.
-  You can still refund the person for the payment made after removing the person as an attendee. See topic: [Refund payment](#)




## Remove from the waiting list

1. At the Site level, select **Bookings > Calendar** from the left menu.
2. Select the required booking in the calendar.
3. Select the **Waiting** tab.
4. Select **Remove** for the person you wish to remove.
5. In the pop-up window, select **Yes**.  
The person will be removed from the booking's waiting list.
6. Select **Close** to close the calendar booking.

## Mark attendance

1. At the Site level, select **Bookings > Calendar** from the left menu.
2. Select the required booking in the calendar.
3. For the attendee who attended the booking session, select the **No**  toggle button in the *Attendance* column to change it to a **Yes** .
4. Select **Close** to close the calendar booking.

**i** In the *Booking* tab of the person's page, the booking's status will be displayed as *Attended*.

Booking Time	Booking Status	Amount	Payment Status	Actions
11:00 AM - 12:00 PM 18/10/2014,  Saturday	<b>Attended</b>	\$10.00	 Paid	<b>Refund</b> 

## Print/save the attendee list

The attendee list displays the booking name, date and time, number of attendees, staff name, area booked, and attendees' details, such as name, email address, phone number and attendance. You can print the attendee list or save it as a document.

1. At the Site level, select **Bookings > Calendar** from the left menu.
2. Select the required booking in the calendar.
3. Select **More Actions**.

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Shang L	Future	\$16.00	No	Pay Waive ⚙️

+ Add Attendee   More Actions   Close

Print attendee list  
Edit this booking  
Edit booking series  
Remove this booking  
Remove booking series from this point onwards

4. Select **Print attendee list**.
5. The *Attendee List* appears.

**Attendee List**

Export   Print   85 %

Page 1 of 1

**Attendee List**

**Booking Name** : 10 visit Gym Package      **Time** : Thursday, 6 November 2014 9:00:00 AM - 10:00 AM

**No. of Attendee(s)** : 4

**Staff(s)** : -

**Area** : Gym Room

**Attendees Details**

#	Name	Email	Phone Number	Attended
1	Aaron D	t@mailbox.com	0435791113	
2	Gan B	b@mailbox.com	0412341234	✓
3	Gan C	a@mailbox.com	0412341234	✓
4	Shang L	l@mailbox.com	0411111111	✓

Close

- To print the attendee list, select **Print**.
  - To save the attendee list, select **Export** and select the desired file format. Then select **Save** to save to your local computer.
6. Select **Close** to close the Attendee List.
  7. Select **Close** to close the calendar booking.