



Bookit Help Contents

The following Help topics are available. Use the scroll bar to see entries not currently visible in the Help window. New users should use the << and >> buttons to read the help file from beginning to end to find out about all the features in this product. To learn how to use Help, press F1 or choose Using Help from the Help menu. Use the mouse to select any topics highlighted.

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Whats New

Whats New Version 1.1

Improved Text Editing - A new menu item Edit has been added. Select this to access Windows cut, copy, paste and select all functions to allow transfer of sections of text both within Book-It and between Book-It and other Windows applications.

Letter Customisation - All Book-It letters can now be customised to allow the default Dear and Yours sincerely text to be replaced with user defined text. Use the User Details screen to set the text required (rel b).

Demonstration Data - Demonstration data is now available when you install a new copy of Book-It. The demonstration data makes evaluation of Book-It much easier and can easily be removed at the end of the evaluation.

Events History Window - You can now use the Events History Days field on the user details screen to control the number of past events that are displayed in the events screen and in the outstanding bookings window off the member screen.

Events View Screen - Event status has been added to the events view screen

Better Letter Addressing - Letters and labels to people for whom only the first name initial is known will now be addressed Dear Mr Smith, instead of Dear D,.

Joint Member Lapsing - Members on joint memberships can now be lapsed individually

Splitting Joint Members - The joint button on the members screen can now be used to split joint members into individual memberships

Right Mouse Button - You can now use the right mouse button instead of pressing the ESC key if you wish

New Reports - Two new credit note reports are now available from the Credit Note screen - Credit Note Summary and Credit Note Detail

Speed Improvements - Several areas of the system have been rewritten to make them work faster with large data files. Some message and question screens will appear slightly different and will be activated quicker.

Ability To Add 0.00 Value Credit Notes - It is now possible to generate a credit note for the value of 0.00. This is so that transactions can still be recorded where a cancellation fee for example is equal to the value refunded so that a record of this cancellation fee will be maintained in the system.

New Files - A new program file is now present in Book-It called FOXTTOOLS.FLL. You may need to include this in your backup procedures if you have not already done so. The file will not change unless Book-It is upgraded by a later version of Book-It.

New Tips And Tricks - Check out the Tips And Tricks section of the help system for new tips and tips included in this version.

Restart After System Freezes - If Book-It hangs on startup because of a power failure, network failure, disk failure, GPF etc, in many instances this is because an index file has got

corrupted. There is now a facility to rebuild all index files to overcome this problem. Simply add the word REINDEX in the program manager item properties command line area after the words BOOKIT.EXE -T. This will start Book-It as normal after rebuilding the indexes. Remember to remove the extra command when you have finished.

Unregistered Version Limiting - Unregistered versions of Book-It are now limited to 100 members, 100 events and 200 bookings. This is in accordance with new ASP guidelines. A unique password issued on registration will unlock this limitation.

Problems Fixed

- Specifying user defined fields in the members filter screen no longer crashes Book-It
- Print Letter Now Yes / No? fixed when using keyboard instead of mouse now works correctly
- Incorrect selection count displayed with deleted joint members corrected
- Cancelled bookings no longer appear as outstanding if amount paid is less than amount due
- Prevent accidental deletion of Standard letters in letters screen (rel a)
- After inserting a new credit note from credit note screen, credit note is no longer immediately marked as printed even if you have not attempted to print it yet (rel a)
- << and >> buttons enabled in help system (rel a)
- Cannot Read Drive D: problem in release A fixed (rel b)



The Shareware Concept

Shareware distribution gives users a chance to try software before buying it. If you try a Shareware program and continue using it, you are expected to register. Individual programs differ on details - some request registration while others require it, some specify a maximum trial period. With registration, you get anything from the simple right to continue using the software to an updated program with printed manual. Copyright laws apply to both Shareware and commercial software, and the copyright holder retains all rights, with a few specific exceptions as stated below.

Shareware authors are accomplished programmers, just like commercial authors, and the programs are of comparable quality. (In both cases, there are good programs and bad ones!) The main difference is in the method of distribution. The author specifically grants the right to copy and distribute the software, either to all and sundry or to a specific group. For example, some authors require written permission before a commercial disk vendor may copy their Shareware.

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Anyone distributing Instinctive Systems software for any kind of remuneration must first contact Instinctive Systems for authorisation. This authorisation will be automatically granted to distributors recognized by the (ASP) as adhering to its guidelines for shareware distributors, and such distributors may begin offering this product immediately (however Instinctive Systems must still be advised so that the distributor can be kept up-to-date with latest versions).

You are encouraged to pass a copy of this product along to your friends / colleagues for evaluation. Please encourage them to register their copy if they find that they can use it.



Introduction

Book-It is a Microsoft Windows based membership and event booking system. It has been designed with both small hobby type clubs and organisations as well as larger businesses such as activity clubs and holiday companies in mind. One of it's key features is that it uses terminology that all users can quickly understand without having to have any professional experience of similar computer software. All that is required is a basic knowledge of the Microsoft Windows operating system. Book-It provides the following facilities

- club / organisation enquiry and follow up
- membership administration
- event or activity booking and administration
- credit note administration
- supplier details
- mail merge and label printing facilities
- flexible reporting facilities

All these facilities are provided by means of an easy to use menu system with extensive use of standard button tool bars and special function keys for easy selection. A context sensitive help system ensures that whenever you are not sure about anything, you can simply press the F1 help key and a help screen will appear explaining clearly what is required at that particular point and what you should do next.

Instinctive Systems have gone to great lengths when designing this product to ensure that the unnecessary complexities, all too often found in competing products, are left out allowing the user more control of his information with the power to hold the information that he specifically needs in a form that he can relate to and hence be in a better position to control his business.



System Requirements

This software requires the following system setup in order to function correctly

- | | |
|----------|--|
| Hardware | <ul style="list-style-type: none">- IBM compatible PC- 386 processor or above- 4Mb RAM (8Mb recommended)- 5Mb free disk space (10Mb recommended)- 1.44Mb / 1.2Mb floppy disk drive- Any Microsoft Windows supported printer- VGA 480x600 / SVGA 600x800 / SVGA 1024x768 screen |
| Software | <ul style="list-style-type: none">- Microsoft Windows 3.1 or above- MSDOS 3.3 or above |
| Network | <ul style="list-style-type: none">- Microsoft Windows For Workgroups 3.11 or above- Microsoft Windows NT- Novell Netware or similar |

In addition, ensure that your c:\config.sys file contains the command FILES=60 or above to avoid experiencing the error message Too Many Files Open. If you wish to have several Windows applications open simultaneously, you may need to increase this value to 100 or more.



Review Guide

The following text aims to help you to better review Book-It by looking through its basic functionality in a logical fashion. It is not intended to be a complete tutorial, but instead just something to get you off the starting blocks quickly, to give you a basic feel for the design of the product and its target market and to help you to decide if it fits your requirements closely enough to warrant further review. We recommend you print this section and then follow it closely during your initial evaluation before breaking off to examine the product in more detail

Getting Started

In order to load Book-It you should run SETUP.EXE which will be found on the first install disk. The Window's install program will install the software into a preferred directory of C:\BOOKIT which you can change if necessary. Once installed, a Windows program group called BOOKIT will be created containing several icons. Select the 'Book-It' item or select 'Yes' to the 'start Book-It' now prompt to start Book-It.

Test Data

Some test data records have been supplied with Book-It to ease evaluation. You should opt to keep these records during the evaluation period when prompted in order to make the evaluation easier.

Enquiries

In any club the first thing that might happen is that people telephone to enquire about the club. You should select the 'Database', 'Enquiries' option from the main screen in order to run the enquiries screen. Now select the 'Insert' button from the lower section of the screen in order to insert a new enquiry as if you have just received a telephone call or enquiry by letter. Enter all the details required on the screen. Some fields can be left blank if not required. Watch the bottom line of the screen for useful information about the current field. Press F1 at any time if you need further assistance. Once all the relevant information has been entered, you should select 'OK' to save the new record. You will be asked if you would like to send a general enquiry response letter to this new enquirer now or if you would like to print it later in batch using the 'Batch' menu. Try printing it immediately to see the format. Use the 'Database', 'Letters' area to change the text of this and other letters later.

Members

Once an enquirer has received his response letter and maybe an information pack, he may decide to join the club. To make him a member of the club you should select the 'Database', 'Members' menu item. Again press the 'Insert' button to add the new member. This time you will be asked if the new member details were previously entered in the enquiries area. If they were then select this option to automatically fill in as much information already recorded as possible and to delete the enquiry record which will no longer be required. Fill in all the relevant details for the new member. Press F1 for any fields that are not immediately obvious. Note that a second member screen will need completing once you move past the last field on the first member screen. Select OK when all the details have been entered.

Events

Some clubs will be happy just to hold details of club members, however, Book-It has been designed so that various club events can be scheduled if required and members booked on

to these. Select the 'Database', 'Events' screen to set up a club event. Select the 'Insert' button to create a new event and fill in as many details as necessary. Note that each event needs to be run by a 'Supplier'. If you run your own events then you will need to set up at least one supplier with your own name and address details, otherwise, set up as many suppliers as you need to run your events using the 'Database', 'Suppliers' menu before creating your events. Some suppliers will of course already have been set up automatically for your evaluation.

Bookings

Once you have set up your event, you should go back to the 'Database', 'Members' screen and use the 'Find' button to locate the new member you have just created above. Select the 'Bookings' button and then use the following screen to book the member on to your new event and to any other events already set up that you wish. Once finished use the 'Quit' button to return to the members screen.

Event Postponements And Cancellations

Select the 'Database', 'Events' menu and the navigation buttons at the bottom left section of the screen to locate a suitable event. Now select the 'Postpone' function to see how easy it is to postpone an event to a later date and to automatically generate letters to all members booked on the event to inform them of the changes. Once you have done this, select the 'Cancel' button to see how easy it is to cancel an event and automatically write to everybody concerned and to automatically generate credit notes for any amounts already paid.

Letters

Use the 'Database', 'Letters' menu to access the letters area of Book-It. From here you modify predefined system letters such as standard enquiries and standard member joining letters etc. You can also generate your own new letters. Select the 'Insert' button to create a new letter. Enter a paragraph of text for example asking all people going on one of the walking weekend events to remember to bring a full kit list with them. Mark this as an 'Events' letter to make it accessible from the events screen. Now go to the events screen, find a suitable event and then press the 'Letters' button. Your letter should appear in the list of available letters. Select OK to print the letter to the screen or printer. Note that your new letter will then be produced, addressed to each of the members booked on the event selected.

Reports

Many reports are available in Book-It. Reports are produced by selecting the 'Reports' button from the relevant screen. Reports are grouped so that you will only see event related reports from the 'Events' screen, enquiry related reports from the 'Enquiries' screen etc. Try selecting each of the screens available from the 'Database' menu and examine each of the reports available in each screen. Try using the 'Filter' button in each screen to select the range of records that you want to see produced in each of your reports.

Further Review

This review guide is only intended to give you an idea of the basic functionality of Book-It. If you get this far and feel that Book-It may be suitable for your own requirements then you should start to work through the top menu systematically reviewing each screen displayed. You should find that the menu has been set up in a logical fashion if you review it from left to right and top to bottom. Each time you reach a screen where you need more information then press the F1 key to access the context sensitive help system. As you go through each

screen you should also use the toolbar buttons in the lower half of the screen. You will find that these buttons are consistent throughout most screens so once you become familiar with them on one screen it should be easier to review the next screen.

Help Documentation

Context sensitive help is available at any time by pressing the F1 key. In order to ensure that you read all the available documentation concerning Book-It, you should select 'Contents' within the help system and then use the << and >> buttons to move sequentially through each of the help topics - there are approximately 70 screens in all. We suggest that you leave this until later in the review once you have grasped the basic functionality of Book-It.



Using Instinctive Systems Software

Instinctive Systems software is designed to be powerful, yet easy to use. A number of features have been developed to allow you to record and access all your information with the minimum of effort. Some of these features are described below. They include:

Easy to use menus

Standard button tool bar

Special function keys

Intelligent Help system



Easy To Use Menus

File Database Miscellaneous Help

Wherever you are in this Instinctive Systems product, you will generally see a menu available at the top of your screen similar to the one above. Use the mouse to activate each menu pad on the menu and a submenu will appear. Select the required item on that submenu again by clicking with the mouse to access the required part of the system.

You will notice from time to time that certain menu options may be dulled. This is either because you are already running that part of the system, or because that particular facility cannot be run at that time (eg if you are currently in the middle of editing). On most occasions it is not necessary to quit the screen you are using in order to access another screen as the menu system takes care of that for you.

For further information on the use of menus, see your Microsoft Windows manual.



Standard Button Tool Bar

A common means of navigation and initiating system options through Instinctive Systems products is the standard button toolbar. This button bar will be activated from many of the screens in the system. It will generally consist of a bar running from left to right across the bottom of the screen. The bar is divided into buttons, with each button capable of performing one of the standard functions listed below when it is clicked with the mouse.



Top goes to the top record in current selection and order



Prior goes to previous record in current selection and order



Next goes to next record in current selection and order



End goes to end or last record in current selection and order



Edit allows editing of information currently displayed on screen



Ins allows insertion of a new record



Del performs deletion of the currently displayed record



Order allows the display order of records to be changed



View produces a tabular listing of selected records on screen



Filter allows filter selection of records



Report provides a selection of reports that can be viewed or printed



Letter allows viewing or printing of mail-merge letters



Labels allows viewing or printing of mail-merge labels



Use the more to display multiple screens



Quit closes the screen currently displayed

◀ TOP Button

Records can be sorted into several orders (eg last name order, reference number order etc) using the sort button. A subset of all the records on the system can be selected using the filter button. The **top** button is then used to access the first record available in the selected sort order which meets the filter condition specified. This might be the record Adams if all records are selected and the sort order is last name, or it might be Gregory if a filter has been set to only show records where last name greater than Franco.

◀ **PREVIOUS Button**

Records can be sorted into several orders (eg last name order, reference number order etc) using the sort button. A subset of all the records on the system can be selected using the filter button. The **previous** button is used to access the record which immediately precedes the current record in the current sort order and which satisfies the current filter condition.

▶ **NEXT Button**

Records can be sorted into several orders (eg last name order, reference number order etc) using the sort button. A subset of all the records on the system can be selected using the filter button. The **next** button is used to access the record which immediately follows the current record in the current sort order and which satisfies the current filter condition.

▶ **END Button**

Records can be sorted into several orders (eg last name order, reference number order etc) using the sort button. A subset of all the records on the system can be selected using the filter button. The **end** button is then used to access the last record available in the selected sort order which meets the filter condition specified. This might be the record Zulu if all records are selected and the sort order is last name, or it might be Jones if a filter has been set to only show records where last name less than Kirby.

FIND Button

There are three ways to find a record you are looking for. You can use the navigation buttons top, end, previous and next buttons to move through the records in the current filter selection until you reach the required record, you can use the view button to quickly browse through records in a tabular listing form until you reach the required record or you can use the find button. **Find** is often the quickest method to get to a specific record, although you may prefer to use the other methods under certain circumstances.

Finding A Record

After selecting the find option, a dialog box will appear which asks for the value you wish to search for and the database file sort order that is to be used. If you want to search for a record with the name Smith you might enter Smith in the search for field and last name in the sort order box. On the other hand if you wanted to search for supplier 0123 you might enter 0123 in the search for field and reference number in the sort order field. Select the OK button to start the find.

You can enter as many or as few characters as you like in the search value. The more characters you enter the more likely you are to find an exact match with the record you are looking for. Search value **is not** case sensitive. Only records whose sort order field **begins** with the search value entered are found, the find facility does not currently look for records which **contain** the search value **anywhere** within the sort order field.

Duplicates

From time to time there may be several records with the same search value, for example there might be several people with the name Green. If this is the case the find will find the very first occurrence and you can then use the next to step through each of the Greens or even use the view button if there are a lot of them. Alternatively, some screens may permit you to enter the lastname and the first name in the find search value eg GreenJames.

Cannot Find The Record

If a search value that you have entered cannot be found, you can click the mouse on closest record to find the closest record alphabetically to the value that you specified. This will often be useful if a name has been input or taken down incorrectly.



EDIT Button

When a record is displayed on the screen, you cannot immediately edit the details until you select the **edit** button. Once the edit button has been selected, the main button tool bar will disappear and be replaced with OK / Cancel buttons. Use standard Windows navigation techniques such as Tab, Shift+Tab and mouse clicks to amend the required details then select OK to finish the edit and save the changes or Cancel to finish the edit abandoning the changes.



INSERT Button

In order to create a new record you must select the **insert** button. The current record will be cleared from the screen ready for you to enter the details of the new record. Enter the new details as required using standard Windows navigation techniques such as Tab, Shift+Tab and mouse clicks to amend the required details then select OK to finish the insert and save the changes or Cancel to finish the insert abandoning the changes.



DELETE Button

Occasionally you will want to delete records. In order to do this, first find the relevant record using the find button. Once the relevant record is displayed on the screen, click the mouse on the **delete** button. You will be prompted if you wish to delete the record on the screen, select OK to delete the record.

Certain screens may not allow you to delete records. For example, you cannot delete members who have pending bookings or bookings history, neither can you delete events on which members have been booked. In these situations, you may find it more convenient to Cancel the record instead so that it remains on the system but inactive.



SORT ORDER Button

Records in the system can be displayed and navigated with the top, next, previous and end buttons in a number of sort orders. For example, supplier records could be listed in last name order or supplier reference number order. Click the mouse on the **sort** button to change the display order in the current screen. A screen will appear which shows the current **file order**. Click on the arrow beside the current file order to see a pull down list of all available orders for the file. Select the new sort order you require then select OK. Note that the system will position itself on the first record in the new sort order which satisfies the current filter condition.



VIEW LISTING Button

The default method of displaying records is to display one record on the screen at any time. By selecting the **view** button, however, you can list the current database file in tabular form where several records can be viewed at one time. View listings always inherit the current sort order and filter conditions which have been set.

Navigation

Standard Windows navigation applies within the subsequent view window which appears. Use the mouse and / or cursor keys to move up and down through available records and to access more fields that may currently be off the side of the screen.

Repositioning Fields

Fields displayed in inconvenient locations (eg off screen) can be reposition in the view window by clicking in the middle of the field column header and dragging the field to the desired new position before releasing.

Resizing Fields

Fields can be resized (and indeed hidden) by clicking the mouse directly in between the field header and adjoining field column header then dragging the column boundary to a new size.

Close View

Tabular listing views throughout the system can be closed by a double mouse click on the top left hand corner of the window, by selecting the Close window option, or by pressing the ESC key.



FILTER Button

From time to time you may be interested in viewing or reporting only a small subset of the available records in the system. You can do this by selecting the **filter** button to implement a filter before you view or report your records.

The filter screen and its operation may at first appear a little complicated, however, please be patient with it and you will soon come to realise the tremendous power it brings to your Instinctive Systems product.

Filter Selection

The top part of the filter screen details the current filter selection. This is the condition which records must satisfy before they are displayed on the screen, viewed, reported etc. For example, if you were only interested in males whose last names are Smith and were born after 1st Jan 1960 or Brown and were born before 1st Jan 1970, you might have the following filter

```
Salutation = Mr
Last Name = Smith
Date of Birth > {01/01/1960}
.or.
Salutation = Mr
Last Name = Brown
Date of Birth < {01/01/1970}
```

You will notice that for each filter condition on a separate line an and condition is implied except where an or condition is explicitly defined.

Delete

The delete option is used to remove a condition line from the current filter selection. In the example above, if anybody with the surname Smith is required, select the Date of Birth > {01/01/1960} filter selection line with the mouse and then click on the delete button to remove it.

Up

The up button can be used to move a specific filter selection line to another position in the filter selection without deleting it and reinserting it. If all the Browns are required but only Smiths born after 1st Jan 1960 but before 1st Jan 1970, select the Date Of Birth < {01/01/1970} line with the mouse and then select up 3 times. You will notice that the Date Of Birth < {01/01/1970} moves up 3 positions and now rests under the Date Of Birth > {01/01/1960} line.

Down

In a similar way the down button can be used to move specific filter selection line to another position in the filter selection without deleting it and reinserting it. Again referring to the first example above, if all the Smiths are required but only Browns born after 1st Jan 1960 but before 1st Jan 1970, select the Date Of Birth > {01/01/1960} line with the mouse and then select down once. You will notice that the .or. and Date Of Birth > {01/01/1960} lines change position with each other.

Or

An or condition can be inserted at any point. Click the mouse where you wish to insert an or condition and then select the or button. Use the Up and Down buttons to reposition the Or condition if it is not placed exactly where you want it.

Adding A New Filter Condition

The lower half of the filter screen is used for generating new filter conditions. To add a new condition no existing filter lines must be selected in the filter selection. If they are, simply click on the blank line immediately below the last condition. Next click on the popup list box to show a list of the fields in the current database file which can be filtered. Select the field you wish to use in the filter condition. Next select the comparison operator (equals, greater than, less than etc), finally enter a value. (Note value **is** case sensitive in the filter screen). Finally in order to add the new filter condition to the existing filter selection select the Add button.

Changing An Existing Filter Condition

An existing filter condition can be amended by selecting it in the filter selection area. You will note that the details in the lower half of the screen will then take on the values of the selected filter line. Change these values as required then select the Add button to complete the changes.

Saving Filter Changes

Filter selection changes are not actioned on the current database file until you select the OK button on the filter screen to return to the previous screen from which you called the filter function.

Cancelling Filter Changes

If you wish to abandon changes which you have been making to the existing filter selection and resume the previous filter selection which was in operation before you entered the filter screen, then select the Cancel option. You will be returned to the screen from which you called the filter function.

Clearing The Current Filter

Select the Reset button to immediately clear all filter selection conditions currently defined. Remember, you will also have to select OK before the changes will be actioned on your database file.

Restoring Defaults

Certain database files will have default filter selections defined. For example, in a membership file, the default selection will be all valid members only, ie lapsed members will initially be ignored. To restore the default filter selection for the database file which you are working on, select the default option.



REPORT Button

Several standard reports have been set up for each of the database files in the system. To view a report on the screen or send it to the printer select the **report** button. A screen dialog will then appear which asks you for the name of the report, the selection and destination. Remember to select OK after entering the required information in order to produce the report.

Report

Reports are related to screens. Selecting the report option on different screens will make different reports available. Select the report you require in the report field.

Selection

Most reports are able to report simply on the record that is currently displayed on the screen or all records that are defined in the current filter selection. As you chose the report name, the selection option may be changed automatically for you to the most appropriate selection for the report specified, however, you are free to override this if you choose.

To

All reports can be sent to the screen or to the printer. If you are not sure whether you have the correct report or the correct filter selection, it is recommended that you send the report to the screen for a preview before you send it to the printer.



LETTER Button

Several standard letters have been set up for each of the database files in the system. To view a letter on the screen or send it to the printer select the **letter** button. A screen dialog will then appear which asks you for the name of the letter, the selection and destination. Remember to select OK after entering the required information in order to produce the letter.

Letter

Letters are related to screens. Selecting the letter option on different screens will make different letters available. Select the letter you require in the letter field.

Selection

Most letters can be produced for the record that is currently displayed on the screen or all records that are defined in the current filter selection. As you chose the letter name, the selection option may be changed automatically for you to the most appropriate selection for the letter specified, however, you are free to override this if you choose.

To

All letters can be sent to the screen or to the printer. If you are not sure whether you have the correct report or the correct filter selection, it is recommended that you send the letter to the screen for a preview before you send it to the printer.



LABEL Button

Several standard label layouts have been set up for each of the database files in the system. To view a label on the screen or send it to the printer select the **label** button. A screen dialog will then appear which asks you for the label type, the selection and destination. Remember to select OK after entering the required information in order to produce the letter.

Label Type

Select the type of labels which you are using eg 1 label across, 2 labels across, 3 labels across etc.

Selection

Most labels can be produced for the record that is currently displayed on the screen or all records that are defined in the current filter selection. As you chose the letter name, the selection option may be changed automatically for you to the most appropriate selection for the label specified, however, you are free to override this if you choose.

To

All labels can be sent to the screen or to the printer. If you are not sure whether you have the correct label or the correct filter selection, it is recommended that you send the label to the screen for a preview before you send it to the printer.



MORE Button

Some areas in the system may contain more than one related screen of information. If a second screen of information is available behind the first screen then the **more** button will appear bright and can be selected with the mouse. Select it once to view the second screen and once again to view the first screen. If only one screen is available the button will appear dull and cannot be used. When editing or inserting records, if there is more than one screen, using the tab key on the last field of the first screen will cause the second screen to display automatically.



QUIT Button

Most screens can be closed using the **quit** button. Note that quit will not be available whilst you are editing or are in the middle of certain screen dialogs, finish the edit or screen dialogue before attempting to use quit. Note that in most cases, the selection of another screen in the main menu quits the previous screen automatically for you.



Special Function Keys

Many of the common Microsoft Windows special keyboard functions have been incorporated into this Instinctive Systems product. Some of the more important ones are listed below

ESC	Press the ESC key to abandon editing in most screens
F1	Press the F1 key at any time to invoke the Help system
PGUP	Move up a page in a tabular screen view / listing
PGDN	Move down a page in a tabular screen view / listing
HOME	Go to left most field currently displayed on screen
END	Go to right most field currently displayed on screen
CTRL-HOME	Go to left most field available (may be off screen)
CTRL-END	Go to right most field available (may be off screen)
CTRL-PGUP	Go to top of list in a tabular screen view / listing
CTRL-PGDN	Go to bottom of list in a tabular screen view / listing



Intelligent Help System

The intelligent help system which you are now reading can be accessed at any point from within this Instinctive Systems product by pressing the F1-Help key. In most cases you will immediately be transported to an area of the help system which relates specifically to the activity you were performing.

See the [contents](#) section of the help system for more information on how to use help.



Book-It In Detail

The following items are available in the main menu displayed at the top of the Book-It screen. Select each item in turn to display detailed help information about its function.

Edit

<u>Cut</u>	Remove highlighted text and place in clipboard
<u>Copy</u>	Copy highlighted text to the clipboard
<u>Paste</u>	Copy text from the clipboard
<u>Select All</u>	Highlight all text in the field

Database

<u>Members</u>	Membership details
<u>Enquiries</u>	Enquiry about club / organisation details
<u>Events</u>	Events or activities available to members
<u>Suppliers</u>	Event supplier details
<u>Credit Notes</u>	Member credit notes / refunds
<u>Letter Text</u>	Letters for use in mail-merge functions

Batch

<u>Check Batch Status</u>	Check details of items awaiting printing in batch area
<u>Enquiry Letters</u>	Print unprinted new enquiry letters
<u>Follow Up Letters</u>	Print unprinted new enquiry follow up letters
<u>Join Letters</u>	Print unprinted new member joining letters
<u>Renewal Letters</u>	Print unprinted membership renewal letters
<u>Credit Notes</u>	Print unprinted member credit notes
<u>Labels</u>	Print labels for each of the above

Miscellaneous

<u>Contact Sources</u>	Enquiry / member contact source details
<u>Event Categories</u>	Event category details
<u>User Details</u>	Details about the user and various system option settings
<u>Reindex Files</u>	Rebuild system files following system problems

Other

<u>Reports</u>	Reports available in this system
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Edit Menu

Use the Edit menu to perform the following standard Windows text editing functions

Cut

Highlight text whilst in edit mode on a screen by dragging the mouse over the text with the left mouse button depressed. Once you have highlighted the required text then select Cut from the Edit menu at the top of the screen to delete the highlighted text from the screen and to place it onto the Windows clipboard so that it can then be copied from the clipboard using the Paste item below to another part of the screen or even to another Windows application.

Copy

Copy works in the same way as the Cut function above except that it does not delete the highlighted text from the screen when it places it in the Windows clipboard, it simply takes a copy of it.

Paste

Once you have copied text into the Windows clipboard using the Cut or Copy functions above, either from Book-It or from another Windows applications, you can then use the Paste function to copy this text to the position where the flashing cursor is currently displayed.

Select All

Instead of using the mouse to highlight the required text in order to perform any of the above functions, you can use the Select All function to automatically select all text in the current data entry field.



Database - Members

The **members** screen under the database menu is used to record details of all members of your club / organisation. As with most of the other database screens, a standard button tool bar appears at the bottom of the screen to help you to navigate your way through the member records and to perform standard functions such as edit, insert, delete etc. In addition, the following special buttons only appear on the Members screen -

Booking Pending History Credits
Renew Joint Stats Lapse.

Members can be defined in Book-It as individual members or joint members ie multiple members on a single membership. The following information is recorded about members.

Name

Members names are broken into 3 parts, salutation (ie Mr, Mrs, Dr etc), first name (eg Dave) and last name (eg Smith). It is important that members names are entered in this format so that mail merged letters are formatted correctly.

Address

Several lines of address are permitted. Most users will only use a few of the available lines of address. The first line of address is compulsory as is the town, it is important that these two lines are completed correctly as they can be used to quickly sort and find members records. Overseas users might use the county field to record the state and the post code field to record the ZIP code for example. Users who do not have members in other countries will not find it necessary to use the country field.

Telephone Numbers

Two telephone numbers can be recorded for members, the home telephone number and the work telephone number. Further telephone numbers such as fax and mobile phones can be recorded in the notes area. Beside each telephone number there is a field called **Exdir**, mark this field by clicking once with the mouse to indicate that the member wishes his telephone no(s) to be ex-directory. Once this is requested the telephone number marked will not be displayed in the Events - Limited Address Report, it will, however, still be available in other screens and reports.

Type

All memberships must have a membership type. The following membership types are available

Annual	- membership valid for 1 year
Quarterly	- membership valid for 3 months
Monthly	- membership valid for 1 month
Bi-Annual	- membership valid for 6 months
Honorary	- free membership no time restriction for VIP members
Press	- free membership to press members for publicity
Coordinator	- free membership for staff coordinators

Members with a membership type which implies a time restriction can automatically be sent renewal letters towards the end of their membership. The renew button on the membership

screen should be used to renew the member at the end of the membership or he will automatically become a lapsed member. Note that the membership type applies to the membership and cannot therefore be different for individual members on a joint membership.

Joined

The current date is automatically stored in the joined field as new members are inserted to indicate the date that the member joined the club / organisation. This date can be changed at any time by selecting the edit button.

Renew

The renew field indicates the date that the membership is next due for renewal. Note that the date will be blank for certain special members whose memberships do not have time restrictions (eg Honorary, Press and Coordinator). The renewal date is automatically calculated based on the membership type as a new membership is inserted, however, the default date suggested can always be manually overtyped. By marking the Renew 1st field on the User Details screen under the miscellaneous menu, the initial renewal date can be forced to become the 1st of the following month. This is particularly useful for organisations who wish to offer anything between 12 and 13 month memberships for annual membership types depending on which part of the month the member joins. Note that once a new membership has been inserted, the renewal date cannot be changed using the edit button, you must use the renew button instead.

Ref

Each new member inserted will automatically be generated a unique member reference number. This number is sequential and is incremented each time a new member is inserted. Use the user details screen to set the next number to be allocated if you wish to skip ranges of numbers or continue from a number that you were at in your old system before you started to use Book-It. Note that occasionally numbers may appear to be missing when members are listed in member reference order. This is because when a user starts to enter new member details, a number is immediately allocated, if the user then decides to cancel the insertion, the number will be lost. This is to avoid any contentions which may arise in a network environment where several users are setting up new members simultaneously.

Occ

The Occ field on the second members screen is used to record the occupation of the member. This field is optional and therefore does not have to be completed.

Source

The source field is used both on the enquiries screen and members screen to indicate the source of the enquiry / new member ie where did the person hear about the club / organisation eg Word Of Mouth, Advertisement etc. Several sources have already been set up in Book-It. This list can, however, be added to and modified using the Sources screen under the Miscellaneous menu.

Medical Cond

Mark the medical cond field with the mouse if the member has a medical condition which you should be aware of. Specific details about the medical condition can be included in the notes field if required. This field is optional.

Insurance

Mark the insurance field if the member carries suitable insurance cover for the events which he will be attending. Insurance is assumed to cover the length of the membership. This field is optional.

Buddy

Some clubs / organisations run Buddy schemes where long serving members volunteer to take new members under their wing when attending their first events so that they can quickly get to know somebody and begin to feel part of things. Mark the buddy option with the mouse for members who have volunteered to take part in this scheme. This field is optional.

Smoker

The smoker field can be used to record which members are smokers and which are not. This information may prove useful when preparing travel arrangements and rooming plans for members who may not already know each other and have a smoking preference. Mark the field if the member is a smoker. This field is optional.

User Field 1-6

Six fields have been included where users can record special user defined information about members. The first three of these fields can have a yes/no true/false value in a similar way to the medical cond or insurance fields. The last three of these fields can contain up to 15 characters of text. The fields can be given user defined names using the [User Details](#) screen. Typical information that might be recorded in these fields might include special discount schemes for example.

DOB

The DOB field is used to record the members date of birth. This field is optional. No age limit restrictions are currently enforced.

Awards

Certain clubs / organisations like to reward long standing members with awards. The awards field can be used to set up your own awards coding system. The following might be a typical example

- B - Bronze Member
- S - Silver Class Member
- G - Gold Class Member

Join Letter Sent

When you insert a new membership, you will be asked if you wish to send a new member joining letter. If you select Yes then a standard new member joining letter will be printed and the current date will be inserted into the join letter sent field to indicate when the letter was sent. Alternatively, you might have selected No then printed the letter at a later date using the [join letters](#) option on the batch menu, in this case, the date that the batch option was selected will be inserted into the join letter sent field at that time.

Renewal Letter Sent

When a member comes up for renewal at the end of his membership period you can print a standard renewal letter using the renewal letters option in the batch menu. The date that this option is selected will be automatically inserted in the renewal letter sent field for the member to indicate when the renewal letter was sent.

Diet

Some clubs / organisations may wish to record member diet information to help with catering arrangements on events. Select one of the following options to indicate the members diet preference - no special diet, vegetarian, vegan, other. If other is selected then further details can be inserted in the notes area (eg White meat only - no red meat).

Notes

Many screens in Book-It include a notes field. This field is used to include any special notes which do not seem to be accounted for in any other fields on the screen. Notes can be as short or as long as you like. Automatic word-wrap will be performed and the notes field can be scrolled to access any notes not currently displayed on the screen. Because notes can be any length, when a tabular view screen is selected the notes field may be displayed as two fields - Abbreviated Notes and Notes. The abbreviated notes will usually contain say the first 30 characters of the notes field, the Notes field will appear to contain the word Memo, click twice with the mouse to explode the Memo field so that all the notes can be seen on the screen.



Members - Booking Button

The **members booking** screen, activated by selecting the **booking** button on the members screen is used to display and to enter member event bookings. Once the booking button is selected, the members screen will temporarily be removed to be replaced with the member booking screen.

The top part of the member booking screen is an edit area which is used to insert and edit details about member event bookings, the bottom part of the screen contains a tabular listing area which displays details of outstanding bookings. Note that this listing will contain details of all bookings for future events, all bookings that still have outstanding amounts due and all bookings for events which took place or were booked within the last 30 days. The right part of the screen contains a button bar similar to the standard tool button bar used on other screens to navigate through the list of outstanding bookings and to perform standard functions such as insert, edit, cancel etc.

Adding New Bookings



Select the insert button to book the displayed member on a new event.

Changing Booking Details



Use the navigation buttons or click twice on the booking in the tabular outstanding booking list to select the booking you wish to change then select the edit button to change any of the booking details

Cancelling A Booking



To cancel a booking use the navigation buttons or click twice on the booking in the tabular outstanding booking list to select the booking you wish to cancel then select the cancel button. You will be asked to confirm that you wish to cancel the displayed booking, select Yes. You will then be asked if you wish to generate a credit note for the cancelled booking, if you select Yes a screen will appear asking you to provide details about the credit note to be generated, complete the details as required and select OK, you will then be asked if you wish to print the credit note now, if you answer Yes it will be printed immediately, otherwise you can print it using the Credit Notes option in the batch menu later.

Making A Booking Payment



A payment will usually be made at the point a booking is received for an event. At that point payment information can be entered straight into the Paid field, however, in situations where only a deposit is paid at time of booking, a further payment may be received later. In order to record this later payment, you should first use the navigation buttons or click twice on the booking in the tabular outstanding booking list to select the booking you wish to record the payment against, then select the Pay button. A screen will then appear which asks for the payment amount, enter the amount and select OK and the amount will automatically be added to the existing Paid amount. Note that negative amounts can be made to resolve administration errors, however, a warning will be displayed.

Booking Fields

Event

When the event field is selected, a list of events which have just taken place (in case of admin errors, delays etc) and events due to take place in the future will appear. Click twice with the mouse to select the required event. Defaults will be created based on the event record. You may override these defaults if required with your own values.

Slots

The number of slots/booking places required

Dep

The deposit that the member must pay to book this event, a default deposit value will automatically be generated from details found on the event record but this can be overtyped if necessary.

Due

The total payment required for the booking from the member. A default due value will automatically be generated from details found on the event record but this can be overtyped if necessary, note that the system will assume that the 1st slot is a member and any additional slots are guests at event guest prices.

Paid

The amount paid against the booking to date. Note that when inserting new bookings if there is a deposit to pay the system will assume that the paid amount is the same as the deposit amount, or if there is no deposit that the paid amount is the total amount. This is purely to reduce typing for most standard bookings but can always be overtyped. Further payments must be made using the **Pay** button as detailed above.

Trans

The final field in the member booking screen is the transport field. Some clubs / organisations might use the transport field to provide a transport link up services to members booked on an event. The following transport values are available

- Direct - Member is going to event directly
- Offer - Member has offered a lift to members without transport
- Need - Member needs a lift
- Share - Member wishes to share transport to reduce costs

You can then use the [Event - Address List](#) report on the Events screen to organise transport on behalf of members booked on an event, or you can send a copy of the [Event - Limited Address List](#) report to each member booked on an event so that members can sort out their own transport arrangements.



Members - Pending Button

The **pending** button on the members screen is used to activate a tabular listing of all bookings for the displayed member for events which are due to take place today or at some time in the future. This listing is often quicker than the bookings button for general member queries and provides more information about the booking.



Members - History Button

The **history** button on the members screen is used to activate a tabular listing of all bookings for the displayed member for events which have already started or have taken place.



Members - Credits Button

The **credits** button on the members screen is used to activate a tabular listing of all credit notes which have been issued to date for the displayed member. Credit notes can be generated in a number of ways, for example from the member bookings screen, from the events cancel / postpone screens or from the credit note screen.



Members - Renew Button

Most membership types provide memberships for a limited period of time (eg 1 year, 1 month, 3 months etc). When this time period has passed a member must renew his membership in order to continue to use the club / organisation and book on further events. Failure to renew will cause the member to become a **lapsed** member. Renewal letters can be automatically generated for members towards the end of their membership using the Renewal Letters option in the batch menu. An option renewal days can be set in the user details screen to indicate how many days before the end of the membership the renewal letter should be generated.

Once a member requests renewal of his memberships and provides any required payment, you must find the members record on the members screen and then click the mouse on the renew button. A screen will appear detailing renewal information which should be completed. In most cases the default values will suffice and you will simply have to select OK..

Type

All memberships must have a membership type. The following membership types are available

Annual	- membership valid for 1 year
Quarterly	- membership valid for 3 months
Monthly	- membership valid for 1 month
Bi-Annual	- membership valid for 6 months
Honorary	- free membership no time restriction for VIP members
Press	- free membership to press members for publicity
Coordinator	- free membership for staff coordinators

Members with a membership type which implies a time restriction can automatically be sent renewal letters towards the end of their membership. Note that the membership type applies to the membership and cannot therefore be different for individual members on a joint membership. The renewal option will automatically default to the same type as the previous membership type used by the member.

Joined

The date the member joined the club / organisation is displayed on the renewal screen for reference purposes only.

Last Renew

The date that the member last renewed is displayed on the screen. It will not usually be necessary to change this date unless there has been an administration error and the last renewal date needs amending in order to enter a next renewal date correctly.

Next Renew

When the renew button is selected, the next renewal date is automatically calculated based on the membership type and the last renewal date, eg if the last renewal date was 01/01/95 and the membership type is annual, the next renewal date will be calculated as 01/01/96. The renewal date calculated can be overtyped, however, it must always be after the last renewal date for obvious reasons.



Members - Joint Button

Members can be defined in Book-It as individual members or joint members ie multiple members on a single membership. In order to add joint members to the system, an individual member must first be inserted, then, as long as the first member is still displayed on the screen, each subsequent time that insert is selected, you will be asked if the new member to be inserted is to be added to the membership currently displayed or is to be on a totally separate membership. Note that Book-It makes the assumption that all joint members have the same home address and home telephone number, therefore, changing either of these details for one joint member automatically changes it for all joint members on the membership.

The joint field on the first membership screen can be used to perform specific actions on joint memberships. Once the joint button has been selected, select the **browse** button to display a list of members who are currently on the joint membership, select the **split** option to remove the member currently displayed on the screen from the joint membership and allocate him / her a membership of their own or select the **cancel** option to return to the membership screen without making any changes. Note that the joint field on the membership screen indicates the number of joint members on the currently displayed membership.



Members - Stats Button

The **stats** button on the members screen can be selected to quickly produce statistics concerning the current members held in the system. These statistics currently include details such as number of members, number of memberships, number of lapsed members, number of special members etc.



Members - Lapse Button

The **lapse** button on the members screen can be selected to force the member currently displayed on the screen to become a lapsed member. This function is commonly performed if the member wishes to leave the club / organisation or if he is being transferred to another branch. Members can be deleted if they have not had any bookings to date, however, it is preferred to lapse members so that historical records about the member are not lost. The effect of lapsing the member is to set the renewal date to yesterdays date and to mark the record as having sent a renewal letter so that one is not automatically generated in the next renewal letters batch run. Once the lapse button is selected a further screen appears providing various lapse options. Select **This One** to lapse only the member currently displayed. If this member is part of a joint membership, the membership will automatically be split into two memberships in order that the member can be lapsed without affecting other members previously on the joint membership. Select **All Joint** to lapse all members on a joint membership to which the displayed member belongs. Select **Cancel** to abandon the lapse function without making any changes.



Database - Enquiries

The **enquiries** section of Book-It under the miscellaneous menu is used to record details of people who have enquired about the club / organisation but have not yet joined. Details may be placed on the computer so that an automatic enquiry letter and information can be sent to the enquirer and then a further follow up letter can be sent if the enquirer has not joined within a given time period as defined in the user details screen. If the enquirer decides to join the club / organisation, his details can automatically be picked up in the members insert screen without retyping.

Name

Enquirers names are broken into 3 parts, salutation (ie Mr, Mrs, Dr etc), first name (eg Dave) and last name (eg Smith). It is important that enquirers names are entered in this format so that mail merged letters are formatted correctly.

Address

Several lines of address are permitted. Most users will only use a few of the available lines of address. The first line of address is compulsory as is the town, it is important that these two lines are completed correctly as they can be used to sort enquirers records and to find enquiries quickly. Overseas users might use the county field to record the state and the post code field to record the ZIP code for example. Users who do not have members in other countries will not find it necessary to use the country field.

Telephone Numbers

Two telephone numbers can be recorded for enquirers, the home telephone number and the work telephone number. Further telephone numbers such as fax and mobile phones can be recorded in the notes area.

Source

The source field is used both on the enquiries screen and members screen to indicate the source of the enquiry / new member ie where did the person hear about the club / organisation eg Word Of Mouth, Advertisement etc. Several sources have already been set up in Book-It. This list can, however, be added to and modified using the Sources screen under the Miscellaneous menu.

Contact

The current date is automatically stored in the contact field as new enquirers are inserted to indicate the date that the enquirer made contact with the club / organisation.

Ref

Each new enquirer inserted will automatically be generated a unique enquirer reference number. This number is sequential and is incremented each time a new enquirer is inserted. Use the user details screen to set the next number to be allocated if you wish to skip ranges of numbers or continue from a number that you were at in your old system before you started to use Book-It. Note that occasionally numbers may appear to be missing when enquirers are listed in enquirer reference order. This may be because when a user starts to enter new member details, a number is immediately allocated, if the user then decides to cancel the insertion, the number will be lost. This is to avoid any contentions which may

arise in a network environment where several users are setting up new members simultaneously. Enquirer numbers may also be missing because the enquirer has been deleted or converted to a member.

Enq Letter

When you insert a new enquiry, you will be asked if you wish to print a standard enquiry letter for the new enquirer. If you select Yes then a standard enquiry letter will be printed and the current date will be inserted into the enq letter field to indicate when the letter was sent. Alternatively, you might have selected No then printed the letter at a later date using the enquiry letters option on the batch menu, in this case, the date that the batch option was selected will be inserted into the enq letter field at that time.

Fol Letter

If an enquirer has not become a member within a certain number of days as specified in the user details screen, then a standard follow up letter can be generated in the batch area. The date that this letter is generated and printed is automatically copied into the fol letter field on the enquiry record.

Notes

Many screens in Book-It include a notes field. This field is used to include any special notes which do not seem to be accounted for in any other fields on the screen. Notes can be as short or as long as you like. Automatic word-wrap will be performed and the notes field can be scrolled to access any notes not currently displayed on the screen. Because notes can be any length, when a tabular view screen is selected the notes field may be displayed as two fields - Abbreviated Notes and Notes. The abbreviated notes will usually contain say the first 30 characters of the notes field, the Notes field will appear to contain the word Memo, click twice with the mouse to explode the Memo field so that all the notes can be seen on the screen.



Database - Events

The **events** screen in the database menu is used to record details about the events or activities that members in the club / organisation can be booked on. These might typically include activities such as holidays, social evenings, seminars and so on. Various information can be set up relating to the event which is carried forward to other screens when members book the events.

Listing Members Booked On An Event

Use the **bookings** button on the events screen to display a list of members currently booked on the event displayed. Remember that cancellations will also be displayed but these will be marked with Cancel in the status field.

Postpone

The event from and to dates can be entered directly on the events screen when a new event is inserted, however, neither date field can be changed if the event recorded is subsequently edited by selecting the edit button. To change an event date select the **postpone** button. A screen will appear asking for the new event start and end dates. Enter the new dates as required then select OK, a further screen dialogue will then appear which asks if you wish to generate standard postpone letters. Select Yes to generate a standard postpone letter, as defined in the Letter Text area, to each member currently booked on the event.

Cancel

Event records can only be deleted if there are no members booked on them. If members have been booked then the event should be cancelled by selecting the **cancel** button instead of deleted. This means that evidence will remain about bookings and the existence of the event afterwards should there be any queries from members who originally booked the event. Once you have selected to cancel the event, you will be asked if you wish to generate automatic cancellation letters as defined in the Letter Text area of the database menu. These letters will be personally addressed to each of the members booked on the event. You will then be asked if you wish to generate automatic credit notes for all the members who have currently booked the event and have also made a payment. These credit notes can be printed immediately or printed later using the credit notes area within the batch menu.

Event Fields

Event

The event field details the name of the event. Care should be taken when deciding the name of the event since this field can be used to quickly access event records. Make event names as unique as possible may help to find events more quickly.

Location

The location field is used to hold the location or venue where the event will be held. Most reports include the event name, location and start date to uniquely identify events.

Category

Events can be allocated categories for grouping purposes (eg Holidays, weekend breaks, activity days etc). Several categories are provided with Book-It, however, this listed can be amended and added to using the categories option in the miscellaneous menu.

Supplier

Each event inserted must have a supplier. Since most clubs / organisations will use several suppliers to stage their events, details of all suppliers used can be recorded in the suppliers area of the database menu. Clubs which stage all of their own events might wish to simply set up a single supplier which contains their own details. A list will appear detailing the available suppliers, use the scroll bars to locate the required supplier.

Date

The start and end dates of the event can be recorded. The start date must always be entered, however, for one day events it is not necessary to enter the end date as the start date will be assumed.

Min

You will usually have a minimum number of members in mind who must book the event in order for it to go ahead. Enter this number in the min field. The number of members booked can be monitored against the min field on a regular basis so that an early decision can be taken to cancel the event due to lack of member interest rather than run the event at a loss.

Max

Events can often only cater for a maximum number of bookings. Enter this number in the max field. If this number is reached, further bookings can still be made (may be due to later expected cancellations), however, you will be warned at time of booking that you have exceeded the maximum number of event slots.

Taken

The current number of slots that have been allocated to members on the displayed event is shown in the taken field.

Free

The free field indicates the number of slots still available on the event. This figure is automatically calculated by subtracting the taken figure from the max slots figure.

Event Cost

Clubs / organisations wishing to monitor event related costs may do so although this is entirely optional. The event cost area is used to record details of costs specific to the event regardless of the number of bookings that are taken on the event. These costs are itemised as follows

- Std - the standard cost charged by the supplier
- Trans - additional transport costs incurred by the club
- Food - additional catering costs incurred by the club
- Other - other additional costs incurred by the club

Event costs and profit / loss values can be analysed in detail using the Event Cost Analysis

report generated from the reports button on the events screen.

Head Cost

In addition to the event costs, there may be further costs which are based on a per member booked basis. These costs are broken down as the event costs ie std, trans, food and other.

Booking Fee

If the club charges its members and their guests to attend events then these details should be recorded in the booking fee area. Two booking fees are permitted, one for members and one for guests and an optional deposit may be requested which is the same for both members and guests. All three amounts can be replaced with discounted values, for example, at time of booking. If a deposit is required then the date that it is required must be specified as must the balance date.

Ref

Each new event inserted will automatically be generated a unique event reference number. This number is sequential and is incremented each time a new event is inserted. Use the user details screen to set the next number to be allocated if you wish to skip ranges of numbers or continue from a number that you were at in your old system before you started to use Book-It. Note that occasionally numbers may appear to be missing when events are listed in event reference order. This may be because the event has been deleted or because when a user started to enter new event details, a number was immediately allocated and then the user decided to cancel the insertion, this is to avoid any contentions which may arise in a network environment where several users are setting up new events simultaneously.

Status

The event status field will appear blank for active events, however, once an event has been cancelled, the status field will display Cancel.

Notes

Many screens in Book-It include a notes field. This field is used to include any special notes which do not seem to be accounted for in any other fields on the screen. Notes can be as short or as long as you like. Automatic word-wrap will be performed and the notes field can be scrolled to access any notes not currently displayed on the screen. Because notes can be any length, when a tabular view screen is selected the notes field may be displayed as two fields - Abbreviated Notes and Notes. The abbreviated notes will usually contain say the first 30 characters of the notes field, the Notes field will appear to contain the word Memo, click twice with the mouse to explode the Memo field so that all the notes can be seen on the screen.



Database - Suppliers

Each event inserted in Book-It must have a supplier. Since most clubs / organisations will use several suppliers to stage their events, details of all suppliers used can be recorded in the suppliers area of the database menu. Clubs which stage all of their own events might wish to simply set up a single supplier which contains their own details.

Listing Future Events For A Supplier

To generate a tabular listing of all events scheduled to start today or in the future for a supplier, select the **pending** button. More detailed information concerning pending events can also be found in reports available on the supplier screen and events screens.

Listing Past Events For A Supplier

To generate a tabular listing of all events that have already started or taken place for a supplier, select the **History** button. More detailed information concerning past events can also be found in reports available on the supplier screen and events screens.

Displaying Supplier Statistics

Some simple supplier statistics such as number of events to date and number of events in the last 12 months for the displayed supplier are available by clicking on the **stats** button.

Supplier Fields

Company

Use the company field to store the company name under which the supplier trades. This is the field which will be used to linked suppliers to events in the events screen and therefore should be unique.

Address

Enter the suppliers address in the standard address format. Remember that only the 1st line of address and the town field are compulsory, however, if the other address fields are entered correctly, that may aid later search and supplier selection functions.

Contact

Enter the main supplier contacts name in the standard name format - salutation (eg Mr, Mrs, Dr etc), first name (eg Dave) and finally last name (eg Smith).

Ref

Each new supplier inserted will automatically be generated a unique supplier reference number. This number is sequential and is incremented each time a new supplier is inserted. Use the user details screen to set the next number to be allocated if you wish to skip ranges of numbers or continue from a number that you were at in your old system before you started to use Book-It. Note that occasionally numbers may appear to be missing when suppliers are listed in supplier reference order. This may be because the supplier has been deleted or because when a user started to enter new supplier details, a number was

immediately allocated and then the user decided to cancel the insertion, this is to avoid any contentions which may arise in a network environment where several users are setting up new suppliers simultaneously.

From

Use the from field to record the date that you started to use a particular supplier.

Tel

Use the tel field to record the suppliers office telephone number.

Fax

Use the fax field to record the suppliers office fax number.

Mob

Use the mob field to record the suppliers mobile telephone number.

Notes

Many screens in Book-It include a notes field. This field is used to include any special notes which do not seem to be accounted for in any other fields on the screen. Notes can be as short or as long as you like. Automatic word-wrap will be performed and the notes field can be scrolled to access any notes not currently displayed on the screen. Because notes can be any length, when a tabular view screen is selected the notes field may be displayed as two fields - Abbreviated Notes and Notes. The abbreviated notes will usually contain say the first 30 characters of the notes field, the Notes field will appear to contain the word Memo, click twice with the mouse to explode the Memo field so that all the notes can be seen on the screen.



Database - Credit Notes

The **credit note** area of Book-It under the database menu is used to administer credit notes or vouchers, issued to members instead of a refund, which can be used as part or full payment towards future events. Credit notes can be inserted directly from the credit note screen, however, several other parts of the system automatically generate credit notes under certain conditions (eg cancellation of an event, cancellation of an existing booking, cancelling during a new booking insertion etc) and it would be quite unusual to insert a credit note from the credit screen. The credit screen is mainly used to receipt returned credit notes and to check on outstanding credit values.

Receipting A Credit Note

When a credit note is returned as a part or full payment for an event or for a cash refund, find the credit note on the credit note screen using the unique credit note number and then select the **use** button to use the credit note. After confirming that the credit note is to be receipted, the credit note will be marked as used on the current date and credit system statistics will be adjusted accordingly.

Stats

Select the **stats** button on the credit note screen to display credit system statistics such as total credits issued to date, total returned or used, total issued in the last 12 months etc.

Print

Most functions in Book-It which created credit notes (including insert on the credit note screen) will ask you if you wish to print the credit note now. If you select Yes it will be printed immediately and marked as printed, however, if you select No you should print it later from the credit note area in the batch menu. On occasions where the credit note has already been printed and you wish to reprint it you can select the **print** button on the credit note screen.

Credit Note Fields

Credit No

Each new credit note inserted will automatically be generated a unique credit note number. This number is sequential and is incremented each time a new credit note is inserted. Use the user details screen to set the next number to be allocated if you wish to skip ranges of numbers or continue from a number that you were at in your old system before you started to use Book-It. Note that occasionally numbers may appear to be missing when credit notes are listed in credit note number order. This may be because the credit note has been deleted or because when a user started to enter new credit note details, a number was immediately allocated and then the user decided to cancel the insertion, this is to avoid any contentions which may arise in a network environment where several users are setting up new credit numbers simultaneously.

Reason

Several predefined reasons can be selected for the generation of the credit note eg Event was cancelled, member cancelled, event was full etc. If none of the standard reasons are applicable then **See Notes** can be selected and further details can be entered in the notes field.

Gross Amt

Enter the gross amount to be credited to the member before any administration or cancellation fee is applied. Note that when credit notes are generated from other areas of Book-It (eg event cancellation) the gross amt is automatically calculated as the event paid by the member to date.

Fee

Most clubs / organisations will enforce a small administration or cancellation charge. Use the fee field to record this and it will automatically be debited from the gross amt value.

Net Amt

The net amt field is automatically calculated as the gross amt value less the administration or cancellation fee and is the final value to which the member will be credited.

Issued

When credit notes are generated, the current date is automatically inserted in the issued date to indicate when the credit note was generated.

Printed

When the credit note is printed by replying Yes to the print now? dialogue screen, selecting the print button, or selecting the credit notes option in the batch menu, the date is was printed is stored in the printed field.

Used

When you receipt a returned credit note as detailed above, the current date is automatically stored in the used field to indicate when the credit note was used.

Member

Credit notes must be attached to members. Details of the member to whom the credit note relates are stored in the member field.

Event

Most credit notes, although not all, will be event related. Details of the event to which the credit note is related may be stored in the event field.

Notes

Many screens in Book-It include a notes field. This field is used to include any special notes which do not seem to be accounted for in any other fields on the screen. Notes can be as short or as long as you like. Automatic word-wrap will be performed and the notes field can be scrolled to access any notes not currently displayed on the screen. Because notes can be any length, when a tabular view screen is selected the notes field may be displayed as two fields - Abbreviated Notes and Notes. The abbreviated notes will usually contain say the first 30 characters of the notes field, the Notes field will appear to contain the word Memo, click twice with the mouse to explode the Memo field so that all the notes can be seen on the screen.



Database - Letter Text

Several standard mail-merge letters can be automatically generated in Book-It. For example a single letter can easily be sent to all members from the members screen, to all members booked on a specific event from the events screen and so on. Details of the text used in all mail-merge letters available in the system are held in the **Letter Text** area under the database menu. Use the navigation buttons to browse through the standard letters that come with the system (all with names beginning Standard) and edit the text or select insert to insert your own letters. Note that standard letters supplied with the system can never be deleted, however, you may delete your own letters at any time.

Subject

The subject field is used to give a brief description of what the letter is

Updated

The updated field is automatically maintained by the system and holds the date that the letter was last updated. This may prove useful when deleting old letters that are no longer required.

Text

The main part of the letter text screen is used to enter the text required in the letter. The system will automatically take care of letter formatting details such as name and address, date etc, simply enter the text that you wish to see in the main body of the letter to be generated.

Where Used

Each letter can be available in the members, enquiries, events or suppliers screen. Mark the required screen and any new letters inserted will automatically become available the next time you select the letters option in the marked screen.



Batch - Check Batch Status

The batch area is used to print unprinted letters in the following categories -

enquiry letters
follow up letters
new member joining letters
member renewal letters
credit notes

Letters are printed in bulk runs conveniently at the end of the day / week etc instead of individually at each of the relevant screens. The **check batch status** option in the batch menu can be used to quickly identify how many unprinted letters of each letter type is currently awaiting processing. Labels can be printed to accompany each of the letters in the batch system.



Batch - Enquiry Letters

Each time a new enquiry record is inserted in the system, a dialogue screen will appear asking if you wish to print a standard **enquiry letter** now. If you select Yes then the letter will be printed immediately and the record marked accordingly, however, if you select No, the letter will wait in the batch area until the **Enquiry Letters** option is selected from the batch menu. After confirming that you wish to print the letters, the letters will be printed and then you will be asked if you wish to mark the letters as printed, if you select Yes then the appropriate records will be marked accordingly and will not appear in this batch category again, however, occasionally you may wish to select No so that the records remain unmarked until you can print the related labels for example. You will then have another opportunity to mark the letters as printed at the end of the labels run.



Batch - Follow Up Letters

If an enquirer has not joined the club / organisation within a given number of days of sending the standard enquiry letter as specified in the user details area within the miscellaneous menu, then an automatic standard **follow up letter** can be generated addressed to the enquirer. Select the follow up letters area of the batch menu to print such letters. After confirming that you wish to print the letters, the letters will be printed and then you will be asked if you wish to mark the letters as printed, if you select Yes then the appropriate records will be marked accordingly and will not appear in this batch category again, however, occasionally you may wish to select No so that the records remain unmarked until you can print the related labels for example. You will then have another opportunity to mark the letters as printed at the end of the labels run.



Batch - Join Letters

Each time a new membership record is inserted in the system, a dialogue screen will appear asking if you wish to print a standard joining letter now. If you select Yes then the letter will be printed immediately and the record marked accordingly, however, if you select No, the letter will wait in the batch area until the **Joining Letters** option is selected from the batch menu. After confirming that you wish to print the letters, the letters will be printed and then you will be asked if you wish to mark the letters as printed, if you select Yes then the appropriate records will be marked accordingly and will not appear in this batch category again, however, occasionally you may wish to select No so that the records remain unmarked until you can print the related labels for example. You will then have another opportunity to mark the letters as printed at the end of the labels run.



Batch - Renewal Letters

When a membership gets within a given number of days of its renewal date as specified in the user details area within the miscellaneous menu, then an automatic standard renewal letter can be generated addressed to the first member on the membership. Select the **renewal letters** area of the batch menu to print such letters. After confirming that you wish to print the letters, the letters will be printed and then you will be asked if you wish to mark the letters as printed, if you select Yes then the appropriate records will be marked accordingly and will not appear in this batch category again, however, occasionally you may wish to select No so that the records remain unmarked until you can print the related labels for example. You will then have another opportunity to mark the letters as printed at the end of the labels run.



Batch - Credit Notes

Each time a new credit note record is inserted in the system, a dialogue screen will appear asking if you wish to print the credit note now. If you select Yes then the letter will be printed immediately and the record marked accordingly, however, if you select No, the letter will wait in the batch area until the **Credit Notes** option is selected from the batch menu. After confirming that you wish to print the credit note letters, the letters will be printed and then you will be asked if you wish to mark the letters as printed, if you select Yes then the appropriate records will be marked accordingly and will not appear in this batch category again, however, occasionally you may wish to select No so that the records remain unmarked until you can print the related labels for example. You will then have another opportunity to mark the letters as printed at the end of the labels run.



Batch - Labels

The following standard letter printing facilities are available in the batch menu. Select each option for more detailed help information

[standard enquiry letters](#)

[standard follow up letters](#)

[standard joining letters](#)

[standard renewal letters](#)

[standard credit note letters](#)

Labels can also be printed to accompany each of these letters by simply selecting the corresponding label batch option. An additional label option **Non-renewal labels** is available to print labels for all valid members not currently marked for renewal. Some users may find this useful when separating monthly mailings for example for ordinary members and those who are just coming up to renewal and therefore need additional materials (eg renewal letter) in their mailing. An alternate method would be to print labels for all valid members using the [label button](#) on the members screen and simply slipping the renewal letter into the required mailings alphabetically.



Miscellaneous - Contact Sources

Details of the **source of contact** of enquirers and members can be recorded on the enquiry and member screens respectively by selecting from a picklist of sources. The contact sources option on the miscellaneous menu can be used to add to or modify the contents of this list of sources. Typical sources might include Word Of Mouth, Advertisement etc. Several default sources are originally defined in Book-It.

Source

A brief description of the source of contact which will appear in the popup source list (eg Newspaper advertisement)

Notes

Detailed information about the source of contact for reference purposes (eg name of newspaper, number of runs, cost of advertisement, dates etc)

No

All source types are automatically assigned unique reference numbers. You will not need this number unless you try to export enquiry and member information into another application such as an Excel spreadsheet for example.



Miscellaneous - Event Categories

Events can be allocated **categories** for grouping purposes (eg Holidays, weekend breaks, activity days etc). Several categories are provided with Book-It, however, this listed can be amended and added to using the categories option in the miscellaneous menu.

Category

A brief description of the category which will appear in the popup category list in the events screen.

No

All category types are automatically assigned unique reference numbers. You will not need this number unless you try to export event information into another application such as an Excel spreadsheet for example.



Miscellaneous - User Details

In order to make proper use of Book-It, you must tell the system about yourself and some of your club / organisations preferences using the **user details** screen selected from the miscellaneous menu. It is important that these details are all set correctly before registering this software with Instinctive Systems.

Company

Your club or organisation name should be recorded in the company field. It is important that you enter this correctly since it is printed on several reports and letters and is used to calculate your registration number by Instinctive Systems.

Name

Enter the name of the main user, or senior staff member responsible for the system in the standard name format ie salutation (eg Mr, Mrs, Dr etc), first name (eg Dave) and finally last name (eg Smith). It is important that name information is also entered correctly since it is printed on several reports and letters and is used to calculate your registration number by Instinctive Systems.

Address

Enter your address in Book-It standard address format. Remember that first line of address and town are compulsory where as all other address lines are optional.

Format

Select the format in which you wish to see dates and currency displayed. The following formats are currently available

Format	Dates	Currency
American	mm/dd/yy	\$
British	dd/mm/yy	£
USA	mm-dd-yy	\$

Tel

Use the tel field to record your office telephone number

Fax

Use the fax field to record your office fax number

Mob

Use the mob field to record you mobile telephone number

Ref No Allocation

Several screens in Book-It generate automatic reference numbers. Use the Ref No Allocation fields to set the next sequential number to be allocated in each of the relevant screens. You may not select a number which is lower or equal to another number that has already been

used in that screen.

Renewal Days

Use the renewal days to specify the number of days before the end of membership terms that automatic renewal letter generation should be triggered in the renewal letters batch area.

Events History Days

Use the events history days to specify the number of days following the end date of an event that the event should no longer be listed in the events screen and in the outstanding bookings window activated by the bookings button off the members screen. This value does not delete any events or events booking history, it simply hides old information that is no longer relevant keeping the number of items displayed on the screen to a minimum. Simply increase the value in this field to access old events and event booking information when required.

Renew 1st

Mark the renew 1st field to automatically move renewal dates to the 1st of the following month when new memberships are inserted in the members screen. Note that this may lead to membership terms of between 12 and 13 months for annual membership types for example depending on the day that the member joined. Note that if the join date is also the 1st then the member will receive a full free months membership upon joining. Renewal days generated can always be manually overtyped if required.

User Defined Field Names

Six user defined fields are available in the 2nd members screen. Use the user defined field area to define names for the six fields if they are required.

Follow Up Days

Use the follow up days field to specify the number of days following the printing of a standard enquiry letter that a standard follow up letter should be sent to an enquirer if they have not joined the club / organisation. Letters will automatically be triggered in the follow up letters batch area.

Letter Start Text

Letters in Book-It by default will begin with Dear Mr Smith ... etc. If you wish to replace the Dear text in letters with your own text (eg for letters written in a foreign language) then enter the new text in the Letter Start Text area.

Letter End Text

Letters in Book-It by default end with Yours sincerely. If you wish to replace this text in letters with your own text (eg for letters written in a foreign language) then enter the new text in the Letter End Text area.

Reg No

Once the software has been registered with Instinctive Systems your unique registration number will appear in the Reg No field.



Miscellaneous - Reindex Files

Most good computer systems store information using at least two files, a data file and an index file. The reason for this is to allow fast access to large data files. The index file is a simple cut down version of the main data file that 'points' to where specific data records can be found rather than reading the entire file from start to finish. This means that each time a new record is stored or amended, at least two files must be updated simultaneously. If your system develops a fault, power is lost or you switch off before leaving the program, then the data and index files can get out of step. This can produce some very strange effects the next time that the program is run, records may seem to contain strange values or may have disappeared for example.

The reindex function is provided to completely rebuild any index files that may have got out of step or corrupted. You should select this option any time you come across a problem that you can not explain, and always use it after a system lock up or power loss. In certain cases the software may automatically run the reindex function for you if it thinks that you did not exit the system properly the last time you used it.



Reports

Use the report on each screen to produce reports. Many report layouts have been set up. In order to make the system easier to use, only reports that directly relate to the current screen can be activated from that screen. Use the filter button before selecting your report to select the subset of information to be reported if required. The following reports are available in the screens indicated within Book-It.

Members

Membership Details	- detailed membership information
Member Registration Confirmation	- member bookings details
Member Address List	- condensed membership address info
Member Summary	- condensed membership other info

Enquiries

Enquiry Details	- detailed enquirer information
Enquiry Summary	- condensed enquirer information

Events

Event Booking Address List	- details of members booked (office use)
Event Booking Details	- brief members booked details
Event Booking Limited Address List	- details of members booked (member use)
Event Cost Analysis	- event profit / lost costing report
Event Summary	- condensed event information

Suppliers

Supplier Detail	- detailed supplier information
Supplier Summary	- condensed supplier information
Supplier Event Confirmation	- details of pending supplier events



Advanced Tips And Tricks

Once you have mastered the basics of Book-It, you might find the following make the software quicker and easier to use.

Hiding The Windows 95 Task Bar

With the default installation, the new Windows 95 task bar will cover the bottom part of your Book-It screen making it difficult to see certain items. You can hide the Windows 95 task bar by clicking on it with the right mouse button, selecting properties and then selecting auto-hide. This will make the task bar disappear until you move the mouse to the bottom edge of the screen at which point it will reappear again for you to use.

Optimising Windows Performance

Several areas of the Windows operating system can be fine tuned to make this system run faster. If you are running a SVGA screen driver, consider whether you need the high resolution of SVGA or not. If not, check your Windows manual to see how you can use the Windows Setup option to make your SVGA screen emulate a VGA screen instead. Because VGA screens contain less detail, they always refresh quicker and hence make your applications run faster. Windows will also run considerably faster if you run in 16 colour video mode instead of 256 colour or above. Alternatively you could purchase a faster video card from your hardware supplier.

If you are only running with 4Mb of RAM, consider upgrading to 8Mb. RAM upgrades at this low memory level often produce more speed improvement than replacing your computer with a faster computer but with the same amount of RAM. See your computer system manual for further information.

Check your swap file in Windows 3.11, Control Panel, 386 Enhanced. Applications run much faster if you have a permanent swap file rather than a temporary one. Your swap file should be at least 10Mb, preferably using 32bit file and disk access. See your Windows manual for more information.

Optimising Network Performance

In addition to network performance tips you might find in your network user manual, you might also consider installing program files (ie BOOKIT.EXE and FOXW2600.ESL) on each workstation on the network. This will reduce network traffic and may lead to some performance improvement although some users with large amounts of memory and cache areas may find this improvement is minimal. Be sure that you set up the program items on each workstation to have a working directory which points to the central network drive data directory, but a command line that references BOOKIT.EXE on a local drive. FOXW2600.ESL should be placed in the same directory as BOOKIT.EXE.

Menu Shortcuts

You will notice some menus have letters beside them (eg Members CTRL+M). This indicates that as well as accessing the members screen from most areas within the system by selecting the Members menu option, you can also activate the option by pressing the CTRL and M keys together. Check the menu option for the shortcut key to activate it.

Accessing Joint Members

Instead of using the Find option to find a joint member on a multiple member membership,

use the Joint button on the members screen, click the mouse once on the required joint member, then close the tabular listing screen. The member screen will automatically settle on the joint member that you selected rather than the member that was previously on the screen.

Keyboard Instead Of Mouse

In many cases the mouse will provide fast access to all parts of the system, however, from time to time when you are typing a lot of information, you will find that the mouse actions start to delay you. On these occasions consider alternate keyboard actions to avoid using the mouse. For example you can select any mouse button action where words have an underlined letter by pressing ALT and the underlined letter. For example, in order to selected OK in an OK Cancel dialog, press ALT and O. In many cases where Cancel is displayed, you could click Cancel with the mouse, press ALT and C or even press the ESC button. The ESC button can also be used as a replacement for a mouse click on a Quit button or a close of a view window for example.

Use Of Right Mouse Button

You can now use the right mouse button instead of pressing the ESC key if you wish.

Detecting The Presence Of Notes

Many screens contain a notes field. In tabular browse screens this notes field may display as a narrow column contain the word Memo or memo. If the M of memo is upper case then the notes field contains information which can be accessed by double clicking the mouse on the field, if it is lower case then the notes field for that record is empty.

Marking Batch Items As Printed Without Printing

Occasionally you may forget to mark certain batch categories as printed after printing them. There is a quick way to mark these records as printed without reprinting all the records in question, simply select the required batch option, select Yes to confirm the operation, select Cancel on the print dialogue screen and then select Yes when asked if you wish to mark the records as printed.

Printing Single Labels

Each time you print labels in Book-It you will find that your printer automatically advances to the top of the next page. This is a feature of most Windows printer drivers and is not specific to Book-It. On occasions where you wish to suppress the automatic form feed at the end of a label print (eg for single labels) you should direct the print output to the **Generic / Text Only** Windows printer driver rather than your standard printer driver. The Generic / Text Only printer driver has an option which can be set in the Windows Control Panel Printers section called **No Page Break** which will suppress the standard trailing form feed. Be careful to set the Generic / Text Only page size to the correct size of your label pages. If the size you are using is not listed (eg 12inch) then you should only send single label prints to this driver and other label runs to your usual driver. Note that the Generic / Text Only printer driver does not currently function correctly with Adobe Type Manager software. Consult you supplier for latest information. See your Windows manual for instructions on how to install the Generic / Text Only Print Driver.



Registration



This product is shareware and as such it should be registered with Instinctive Systems if you are to continue to use it after the initial 30 day evaluation period. In order to register the product you should use Microsoft Windows Write to access the required registration form relevant to the country in which you live. The following forms are available.

REGISTUS.WRI	-	USA
REGISTCA.WRI	-	Canada
REGISTUK.WRI	-	UK and Other Countries

Icons for these forms should have been set up in your program manager group when you installed Book-It. Simply click twice on the relevant icon to edit the registration form, or enter the following command at the program manager File, Run option

WRITE C:\BOOKIT\REGISTUS.WRI etc

Registrations are accepted by mail, email and fax. Payments may be made cheque, VISA, ACCESS and MASTERCARD or Compuserve users may use the Compuserve service GO SWREG to register on-line and have the registration fee directly debited from their Compuserve account. Further registration instructions and pricing details can be found on the forms listed above.

Registration Benefits

By registering this package with Instinctive Systems, you become eligible for the following:

- a registration number to remove all 'on evaluation' screens and messages
- removal of all member, event and bookings limits
- a copy of the latest version of this product
- lifetime support for written correspondence
- written notification of at least the next 2 major upgrades
- immediate notification of major bugs found with registered version
- package and shipping costs only fix releases for reported problems
- opportunity to provide input towards development of future releases
- opportunity to request customisation of system unique to your company

Remember - shareware is based on your honesty. If you like this product and you continue to use it after your initial evaluation, then you should register it. If you do not register after the evaluation period you are breaking the license agreement and should discontinue to use the product.



Other Products And Services

The following software is available from Instinctive Systems at this time. Please contact your shareware distributor for further product information

BookKeeper

A simple to use DOS based bookkeeping system. Income and expenditure recording, customer details, estimates and invoicing functions. Note - BookKeeper 1.2 is likely to be the last DOS based version of the BookKeeper. Development of a Windows based BookKeeper has begun.

Book-It

A Windows based membership and event booking system. Enquiry recording and follow up, membership administration, event / activity booking, supplier details letter and label mail merge facilities.

Services

In addition, Instinctive Systems undertakes custom database application development and consultancy using Microsoft Foxpro for Windows. Current rates are £900 pounds sterling per week plus travel expenses. Please call or write for further details.



Support

At Instinctive Systems we offer a free product support service to all registered users of our software as detailed in the [registration](#) section of this help system. Our Support Service can help you with any questions you may have about our software and help you to fix any [faults](#) you may find. An import part of our support service is also to provide you with an opportunity to give us [feedback](#) about our products so that future upgrades can be designed better to suit your requirements.

The Instinctive Systems office is not manned on a permanent basis since the shareware software side of the business does not currently warrant this and the development team are often working with larger client sites during normal office hours in between shareware development phases for several weeks or more at a time. As a result we prefer to insist that registered users correspond with us by mail, fax or Email whenever possible, for which there is generally a 3 to 5 day turnaround in the UK, possibly longer for overseas users. Since our current registration fees are extremely competitive, we are reluctant to regularly telephone customers directly and incur costly long distance telephone charges unless absolutely necessary. So far this strategy has benefited both our customers and ourselves, however, when a situation is reached where we can no longer operate this way, we will then of course have to pass on our additional costs to our users by means of higher registration fees and upgrade charges.

In order for us to help you as quickly as possible, please ensure that you quote the following details on all correspondence

Your name
Your address
Your company name

The product name and version
Your telephone and fax number
Clear details of your problem



Software Bugs

This software has been produced and tested with a great deal of care and attention to detail. Every effort has been made to ensure that the product works correctly as specified in the user guide. Rigorous testing has been done to ensure that the product operates to a high standard.

However, as with any software product, you may find that problems occur under certain circumstances which we could not test for. In these cases, we will endeavour to fix any errors reported to us in writing. In order that we can help as quickly as possible, it would be useful to send a copy of your data along with a detailed description of how the problem can be replicated.



Upgrades

All registered users of this product will be informed when upgraded versions of the product become available as detailed in the registrations section of this help system. Details of new / improved features in the product will be detailed and registered users will be given the option of upgrading at a part of the full registration cost.

Future upgrades planned for Book-It include the following

- membership joining fee / renewal payment details recording
- booking payment history recording
- membership analysis report
- event balances due report
- supplier past events analysis report
- enquiry and member source analysis report
- standard renewal follow up letter facility
- standard outstanding booking balance follow up letter facility
- personalised company name stationary on many letters / reports
- event booking reservation facilities
- more extensive label support facilities
- graphical reporting facilities
- Windows cut and paste functions
- member / supplier photographs

Please note that all of these facilities cannot possibly be included in the next upgrade and further improvements will be included which have not been listed here. Our upgrade program, will, however, ensure that the facilities most requested by our registered users are the first to be developed.



Customer Comments

Upgrades to this and other Instinctive Systems software are based on feedback from yourselves, our customers. If you feel that there is a feature missing from this package, or that it could be improved upon in any way, then please let us know. At Instinctive Systems, our aim is to make the products you want to use!



ASP Author Standards

The following are the general standards that ALL ASP Author and Publisher Members have agreed to follow. Each was passed by a 2/3 vote of those members voting and is binding on all author / publisher members.

1. ASP-compliant products are shareware products, produced by ASP Author Members or published by ASP Publisher Members, that satisfy all the requirements in this document. Only ASP-compliant products may use the ASP logo or Ombudsman statement. Only ASP-compliant products may refer to the ASP -- whether in the product, documentation, or marketing materials -- in any way that might reasonably be interpreted as suggesting ASP compliance. ASP-compliant shareware products must be created and marketed in a professional manner. ASP Author and Publisher Members must treat the user of the product and the concept of shareware with courtesy and respect.
2. An ASP-compliant product may limit the user evaluation period. If such limitation is used, the product must allow users access to the features customary or reasonable for that type of product for a time period or number of uses sufficient to allow adequate evaluation by the user. An ASP-compliant product may also use other limiting measures. Such measures must not unduly interfere with the evaluation of the product. Users must be notified, while using the program, of the impending expiration of the evaluation period. This notification must occur well in advance of any disabling of features or cessation of program operation. All limiting measures must be documented, and such notification must refer to that documentation. Users obtaining the shareware version of an ASP-compliant product from any source approved by the author must be able to install and use the product for the full evaluation period.
3. Registration Reminder Screens may be used in an ASP-compliant product. Such Registration Reminder Screens must not unduly interfere with the evaluation of the product during the initial evaluation period.
4. An ASP-compliant product must be substantially complete, and accurately represent the registered version, except in cases where a substantially complete product would provide little or no reason for the user to register and pay for the product. Examples include some games, source code for programmer's tools, electronically published books, fonts, and clip art collections. In those cases, a portion of the product allowing adequate evaluation of the product may be distributed. A Non Shareware Version (NSV) of an ASP-compliant product, which includes advanced features, may also be offered, in addition to the normal registered version.
5. When, during evaluation of an ASP-compliant product, a user creates data that have substantial independent value, the product shall not prevent some form of access to those data even after the expiration of the evaluation period. Such access may or may not require further use of the product itself.
6. An ASP-compliant product must include some form of documentation sufficient to allow thorough evaluation of the product's features. Such documentation must explain how to register and pay for the product and define the benefits of payment and registration. It must also describe any evaluation limitations and differences between the shareware and registered versions. This documentation must also describe support policies, and include the

current ASP Ombudsman statement.

7. An ASP-compliant product must offer some documented method or instructions for safely removing the product from the user's computer.

8. An ASP-compliant product must include reasonable technical support for a minimum of three months after the purchase of the registered version of the product, without additional payment.

9. An ASP-compliant product must be conscientiously tested by the author, and should not be harmful to user data or hardware when properly used on a typical computer.

10. All ASP Author and Publisher Members must market and distribute at least one ASP-compliant product. They may also market and distribute products which are not ASP-compliant, subject to the limitations of Item 1 of this document.

11. Authors and Publishers applying for membership in the ASP shall submit a product for examination by the ASP Author Membership Committee. This product must meet all requirements in this policy before membership is granted. Negative decisions of the Author Membership Committee shall be automatically reviewed by the ASP Board of Directors, whose decision is final. An author whose application is rejected may reapply at any time.

12. All products marketed as ASP-compliant must meet the requirements of this policy. The

ASP Author Compliance Committee (ACC) is entrusted to make the sometimes difficult judgments involved in enforcing these requirements. If the ACC finds that an ASP member's product violates these requirements, that member must modify the product to comply, or must remove all indications of compliance. If the member refuses to make these changes within 30 days (or a longer alternate period set by the ACC), the ACC may recommend to the Board of Directors that the member's ASP membership be terminated.

13. The ASP Board of Directors may not materially change items in this policy, but may, from time to time, explain, interpret, or clarify these policies.

14. The author will keep the ASP apprised of changes in mailing address and of any changes in the status of his/her programs.



The Shareware Ombudsman

This program is produced by a member of the Association of Shareware Professionals (ASP). ASP wants to make sure that the shareware principle works for you. If you are unable to resolve a shareware-related problem with an ASP member by contacting the member directly, ASP may be able to help. The ASP Ombudsman can help you resolve a dispute or problem with an ASP member, but does not provide technical support for members' products.

Please write to the ASP Ombudsman at 545 Grover Road, Muskegon, MI 49442-9427 USA, FAX 616-788-2765 or send a CompuServe message via CompuServe Mail to ASP Ombudsman 70007,3536.

