



Book-It Help Contents (Retail Editions)

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.

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To learn how to use Help, press F1 or choose **Using Help** from the Help menu. Use the mouse to select any topics highlighted.



Whats New

Whats New 2.0

The following items were introduced to Book-It for Windows as new features or improvements at the version 2.0 release.

New Editions - New Lite and Pro retail editions of Book-It have been introduced offering more flexible levels of product features, support and pricing.

Subscription Payments - You can now use the renewal information data screen both during the creation of a new member and at membership renewal to enter details of membership subscription payments.

User Details Fields - Set the usual membership subscription amount and method of payment on the 2nd user details screen. This will be suggested as a default when entering new subscriptions but can always be overwritten on a member by member basis.

Payments Screen - All payments entered from the membership subscription and renewal areas and member booking area can now be listed, amended or removed from the new payments screen under the database menu. Other payments can also be entered such as member payments for items such as promotional material and hire of equipment and payments to suppliers regarding events that they have run.

Laser Labels - Support for a variety of label types has now been introduced including continuous labels and both letter and A4 size laser labels.

Reports - A new report is now available in the Events screen to produce a list of Overdue Event Deposits And Balances (Pro Edition Only). The report can be run once a suitable filter has been set to help follow up all outstanding booking payment items. A new Payment Detail report is also available from the new Payments screen listing full details of all payments entered in the current filter including payment type, date, amount, method of payment, who the payment was to or from and what it was regarding.

Find Screen Changes - A new list screen now appears if there are multiple records in your data files matching the selection criteria entered or if the closest record box is checked making it much quicker to find records. If you change the file order in the find screen to look for a record based on a field other than the default order field this now only temporarily instead of permanently changes the file order.

More Speed - More speed improvements have been made to the member booking screen and to the user details screen. The bookings screen has been totally rewritten to make it run faster once several thousand bookings are in the system. The pending and history buttons on the member screen have now also been made faster for large numbers of members and bookings.

Printer / Screen Option Enhancements - labels, letters and reports will now return to their relevant output destination option screens following screen preview making it easier to preview to screen then print immediately.

Batch Preview - Letter and label runs from the batch menu can now be previewed to screen before printing.

Sources and Categories - Find on sources and category screens is no longer case sensitive (Pro Edition Only).

Inserting New Members - Inserting new member records has been amended slightly to improve ease of use and make the process faster by using the new find screen to locate members previously stored as enquiries.

Booking Screen - The member booking screen has been amended to make booking entry quicker and location of events easier.

Credit Note Screen - The credit note screen has been amended to make location of the member to whom a new credit note is to be allocated easier.

New Files - Several new files have been added to Book-It with this upgrade. Please ensure that all new files are picked up by your backup procedures already in place.

SVGA Support - Support for SVGA high resolution 1024 x 768 has been improved.

Date Fields - Certain date fields on several screens and reports have been made wider to avoid truncation of some dates held in the USA format MM-DD-YY.

Deskjet Support - Slightly wider margins have been introduced on reports and letters for the benefit of users of the HP Deskjet for example which cannot print as close to the edge of the paper as some other printers.

Whats New 1.1

The following items were introduced to Book-It for Windows as new features or improvements at the intermediate 1.1 release.

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 (release 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 tricks included in this version.

Restart After System Freezes - If Book-It hangs on start-up following 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 now limit the number of members, events and bookings that may be entered during the evaluation. This is in accordance with new ASP guidelines. A unique password issued on registration will unlock this limitation.



Disclaimer

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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 subscriptions and administration
- event or activity booking and administration
- detailed payment analysis
- credit note administration
- supplier administration
- 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 you more control of your information with the power to hold the information that you specifically need in a form that you can relate to and hence be in a better position to control your organisation or business.



System Requirements

This software requires the following system set-up in order to function correctly

- | | |
|----------|---|
| Hardware | <ul style="list-style-type: none">- IBM compatible PC- 386 33Mhz processor or above- 4Mb RAM (8-16 Mb recommended)- 5Mb free disk space (10Mb recommended)- Any Microsoft Windows supported printer- VGA 480x600 / SVGA 600x800 / SVGA 1024x768 screen |
| Software | <ul style="list-style-type: none">- Microsoft Windows (3.1, 3.11, 95, NT or above)- MSDOS 3.3 or above |
| Network | <ul style="list-style-type: none">- Microsoft Windows For Workgroups 3.11, 95 or above- Microsoft Windows NT- Novell Netware or similar |

In addition, ensure that your c:\config.sys file contains the command FILES=70 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. Also ensure that you have a sufficiently large permanent Windows swap file to avoid Insufficient Memory errors when running on limited memory machines. See your DOS / Windows manuals for more information.



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 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 during start-up in order to make the evaluation easier. It is easy to discard the evaluation data later once your evaluation is complete.

Enquiries

In any club the first thing that often happens is that people write or 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 as you enter the new data (note - Windows 95 users may have to set the Windows 95 task bar to auto-hide in order to see the bottom of the screen properly, see your Windows 95 manual for more information). 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. If there is already a member displayed on the screen, you will be asked if you wish to add the new member to the same membership as the displayed member to make a joint membership. Select no to this prompt so that your new member is on an individual membership. Next you will be asked if you wish to retrieve information from the enquiries file. This is a useful facility to avoid retyping of member information that has already been entered as enquiry information. Select yes to the prompt to bring up a find dialogue screen which will allow you to browse the enquiries file for the enquirer that you wish to now make a member. Select the

required enquirer from the list and the system will automatically fill in as much new member information as possible and delete the enquiry record which will no longer be required. A renewal details dialogue screen will now appear. Enter details about the membership renewal frequency to be applied (e.g. annual, quarterly etc.) and details of any subscription payments that may have been made. Once this information is complete you may fill in all the remaining relevant details for the new member (note that there are two screens for entering member information, always use the TAB key to move from field to field not the RETURN key and the 2nd screen will automatically appear as you TAB out of the last field on the 1st screen). Press F1 for any fields whose purpose is not immediately obvious. Select OK when all the details have been entered.

Events

For many subscription based clubs and organisation it may be sufficient to simply 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 or activity. 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'. As you TAB into the supplier reference screen a find dialogue screen will appear to help you to locate the supplier that will be running this event. 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 use 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.

Payments

Several screens within Book-It allow entry of details concerning payments. The member renewal screen for example records renewal subscription payments and the booking screen off the member screen allows entry of payments regarding event bookings made. Go to the members screen and press the payments button to see a list of all payments made by various club members. Use the Database, Payments menu to activate the main payments screen where you can look at all payments made to or by the club / organisation in detail and amend payments where necessary.

Letters

Use the 'Database', 'Letters' menu to access the letters area of Book-It. From here you can 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. Trying 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 pages in all. Remember that each page may go off the bottom of the screen so use the scroll bar on the right hand side of your screen to check that you are at the end of the page before moving on to the next page. We suggest that you leave this until later in the review once you have grasped the basic functionality of Book-It.

[Good luck with your review. We look forward to working with you in the near future!](#)



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

Remember that Book-It is a Windows product and therefore tries to adhere to common Windows standards wherever possible. One of these standards that users often find confusing when using a Windows database system for the first time is to use the TAB key to move forward from field to field and SHIFT+TAB to move backwards. You should always use TAB and SHIFT+TAB for this purpose, never use the RETURN key to move to the next field, that was a common DOS standard which although it will work in place of TAB in many situations there will be situations where it may not work as initially expected. See your Windows manual for more information.



Easy To Use Menus

File Edit Database Miscellaneous Help

Wherever you are in an 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 (e.g. 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 running 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

◀ Navigation Buttons

Records can be sorted into several orders (e.g. 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.

◀ 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.

▶ 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.

▶ 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 dialogue 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. The 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. You may only leave the search value empty if you select the Closest Record option.

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 then a tabular listing will be activated with the cursor positioned at the first record which meets your specified search criteria. Use the scroll bars to move through the records until you are able to click on the required record then press ESC or the right mouse button to select it. Alternatively, some screens may permit you to enter the last name and the first name in the find search value e.g. GreenJames to avoid listing duplicates.

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. Note that a tabular selection list will always be activated if Closest Record has been marked.

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. This is a safeguard against accidental editing and to make it easier to abandon mistakes. Use standard Windows navigation keys 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 keys 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 (e.g. off screen) can be repositioned 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.

Resized And Hidden 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 position.

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 a 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, i.e. lapsed members will initially be ignored, in a payments file the default filter might only show the last few months payments. 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 dialogue 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, in most instances 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. If you send the report to the screen the system will return to the report screen after you have previewed the report on screen, however, as soon as you have sent the report to the printer the system will exit the report screen.



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 dialogue 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 letter 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. If you send the letter to the screen the system will return to the letter screen after you have previewed the letter on screen, however, as soon as you have sent the letter to the printer the system will exit the letter screen.



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 dialogue 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. The system currently supports both continuous and laser label types. The continuous labels supported are both on 12 inch sheets, 8 labels down and 1 or 2 labels across, each label is 3.5 inches wide. There are 6 laser label types supported, 3 A4 sheet size and 3 Letter sheet size. Their Avery numbers are displayed in the label type popup on the labels screen. If you cannot use any off these label types then please send an example label sheet that you would like to use along with an Avery number if available to Instinctive Systems Ltd and we will see if it can be added to our list of supported label types.

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. If you send the label to the screen the system will return to the label screen after you have previewed the label on screen, however, as soon as you have sent the label to the printer the system will exit the label screen.

Start At Label

On many occasions you will find that label sheets are only partly used leading to wastage of unused labels. To help you to reduce wastage we have introduced a facility to specify the label position on the sheet where the first label is to be printed, for example if you only used the first two labels on the previous sheet, you could reuse the sheet and set start at label to 3. We do, however, warn you that most printer manufacturers will recommend that you do not put label sheets through printers more than once to reduce the risk of labels peeling off and jamming in the printer mechanism - **YOU HAVE BEEN WARNED!**



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 dialogues, 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

TAB Always use TAB to move forward through fields, do not use RETURN

SHIFT+TAB Use SHIFT+TAB to cycle back through fields when editing

ESC Use the ESC key to abandon editing in screens and to select in lists

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.

File

Printer Set-up	Change the default printer settings
Exit	Leave the Book-It system

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>Payments</u>	View and amend payments into and out of the organisation
<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>	Administer contact source details (Pro Edition Only)
<u>Event Categories</u>	Event category details (Pro Edition Only)
<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 - 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 (i.e. Mr, Mrs, Dr etc.), first name (e.g. Dave) and last name (e.g. 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 i.e. where did the person hear about the club / organisation e.g. Word Of Mouth, Advertisement etc. Several predefined sources are already set up in Book-It. This list can be added to and modified using the Sources screen under the Miscellaneous menu if you have purchased the Pro Edition of Book-It.

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 - 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 Payments
Credits Renew Joint Stats
Lapse.

Members can be defined in Book-It as individual members or joint members i.e. multiple members on a single membership.

Inserting A New Member

Press the 'Insert' button to add a new member. If there is already a member displayed on the screen, you will be asked if you wish to add the new member to the same membership as the displayed member to make a joint membership. If you select yes to this option then a new member record will be created with the same membership renewal information and address details as the previously displayed record so that you simply have to enter a small amount of the personal information for the new joint member such as his name and occupation etc. If you select no to the prompt then a completely new membership record will be created with the next available membership number. Next you will be asked if you wish to retrieve information from the enquiries file. This is a useful facility to avoid retyping of member information that has already been entered as enquiry information. Select yes to the prompt to bring up a find dialogue screen which will allow you to browse the enquiries file for the enquirer that you wish to now make a member. Select the required enquirer from the list and the system will automatically fill in as much new member information as possible and delete the enquiry record which will no longer be required. A renewal details dialogue screen will now appear. Enter details about the membership renewal frequency to be applied (e.g. annual, quarterly etc.) and details of any subscription payments that may have been made. Once this information is complete you may fill in all the remaining relevant details for the new member

Name

Members names are broken into 3 parts, salutation (i.e. Mr, Mrs, Dr etc.), first name (e.g. Dave) and last name (e.g. 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
Bi-Annual	- membership valid for 6 months
Quarterly	- membership valid for 3 months
Monthly	- membership valid for 1 month
Honorary	- free membership no time restriction for VIP members
Press	- free membership to press members for publicity
Co-ordinator	- free membership for staff co-ordinators

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. Also note that although the membership type is displayed on the main member screen it can only be changed when inserting a new member and later by selecting the renew button.

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 (e.g. Honorary, Press and Co-ordinator). 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 although the renewal date is displayed on the main member screen it can only be changed when inserting a new member and later by selecting the renew button.

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 i.e. where did the person hear about the club / organisation e.g. Word Of Mouth, Advertisement etc. Several sources have already been set up in Book-It. This list can be added to and modified using the Sources screen under the Miscellaneous menu if you have purchased the Pro Edition of Book-It.

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

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.

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. This insurance might be private insurance carried by the member or

insurance taken out by the organisation on the member. 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.

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 preference 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 (e.g. 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 events history days period. 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



In order to record a booking 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. It should not be necessary to use the Database, Payments menu to enter new event booking payments. Note that the Pay button will automatically be pressed for you each time you insert a new booking in order to receive the first payment against that booking.

Note - when making a payment, the default payment method (paid by) will appear as specified in the Miscellaneous, [User Details](#) screen. If you specify cheque for example, then when you open the popup list you may have to scroll upwards in order to see cash because cash comes alphabetically before cheque and the top item in the list displayed is usually the current setting, temporarily hiding items before it.

Booking Fields

Event

Use the event field to enter the reference number of the event to which the booking relates. As this may not always be easily determined a facility exists so that you can leave the reference blank and press TAB to invoke the events [find](#) dialogue screen where you can look for the event by name for example and the event reference number will automatically be generated for you. 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 may appear. Click twice with the mouse to select the required event. Defaults will be created for other fields on the booking screen based on the event record selected. 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 pay amount when generating a payment is the same as the deposit amount, or if there is no deposit that the pay amount is the total amount. This is purely to reduce typing for most standard bookings but can always be overtyped.

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 - Payments Button

The **payments** button on the members screen is used to activate a tabular listing of all payments which have been received from or issued to the member currently displayed on the screen. Payments can be generated from the member bookings screen, the member renewal and the Database, Payments screen.



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 (e.g. 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 membership 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.. The renewal screen will also appear whenever you insert a new member into the system.

Type

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

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

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 / Renewed

The date the member joined the club / organisation or last renewed (whichever is the latest) is displayed on the renewal screen for reference purposes only. The member joined date can only be edited from the main member screen.

Next Renewal

When the renew button is selected, the next renewal date is automatically calculated based on the membership type and the joined / renewed date, e.g. if the last renewal date was 01/01/96 and the membership type is annual, the next renewal date will be calculated as 01/01/97. 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 i.e. 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 - 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.

Bookings

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. Making event names as unique as possible may help to find events more quickly later.

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 (e.g. Holidays, weekend breaks, activity days etc.). Several standard categories are provided with Book-It. This list can be amended and added to using the categories option in the miscellaneous menu by users who have purchased the Pro Edition of Book-It.

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. Use the supplier field on the events screen to enter the supplier reference number. Once a valid reference number has been entered the supplier's name will be displayed beside the reference number. If the reference number is not known then leave the reference blank and press the TAB key to activate the supplier find screen which will allow you to find the supplier by company name or contact name for example. A list will appear detailing the available suppliers, use the scroll bars to locate the required supplier then press ESC or the right mouse button to select it.

Date

The start and end dates of the event can be recorded. The start date must always be entered, the end date will automatically be set the same as the start date to assume a one day event, however, this can be overtyped as required.

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 (maybe 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 and guests 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 by users who have purchased the Pro Edition of Book-It.

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 in the same way as the event costs i.e. 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.

Pending

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.

History

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.

Stats

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.

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 (e.g. Mr, Mrs, Dr etc.), first name (e.g. Dave) and finally last name (e.g. 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 - Payments

The **payments** area of Book-It under the database menu is used to administer payments by or to your organisation. Payments can be automatically generated from several parts of the system, for example event booking payments are generated from the booking screen off the member screen, member subscription payments are generated from the renewal screen off the member screen etc. The payments screen is the central place where all payments throughout the system whether they are payments to or from a member, to or from a supplier, regarding a subscription, event booking, hire of equipment, promotional materials etc. can all be reported together. New payments can be inserted from the payments screen, however, this is recommended only as a last resort as new payments particularly event bookings and subscriptions can be created elsewhere much easier. You will, however, need to use the payments screen to make amendments to payments that could not be made elsewhere for example to add notes to a payment.

IMPORTANT NOTE - When analysing payments for your accounts, please remember to treat payments of type Credit Note separately to avoid doubling up on amounts that may have been paid to your club or organisation. When credit notes are issued, no negative payment is made to cancel the original payment so when the credit note is returned it is not really a new payment but simply a reallocation of the original payment.

Type

Use the type field to indicate the type of payment being recorded. The following types are currently available.

- Event Booking - member payment for an event booking
- Event Payment - payment to a supplier for an event run
- Hire Of Equipment - member payment for hire of club equipment
- Promotions - member payment for promotional material e.g. T-Shirts, mugs
- Subscription - membership subscription payment
- Other Payment - other payment to or from a member
- Other Payment - other payment to or from a supplier

Direction

Use the direction field to indicate whether the payment came into the organisation or went out of the organisation. For example a subscription payment would generally be marked as Income, however, if a member resigns before the end of his membership term then any refund might be entered as Subscription Payment, Expenditure.

By

Use the by field to indicate the method by which the payment was made. This could typically include cash, cheque, credit card, credit note, direct debit, standing order, other or unknown.

Note - if recording a payment by Credit Note - please remember to also mark the credit note as Used in the credit note screen. This is expected to become an automated process in a later version of Book-It.

Further note - when making a payment, the default payment method (paid by) will appear as specified in the Miscellaneous, User Details screen. If you specify cheque for example, then

when you open the popup list you may have to scroll upwards in order to see cash because cash comes alphabetically before cheque and the top item in the list displayed is usually the current setting, temporarily hiding items before it.

From / To

Use the from / to field to indicate the reference number of the member or supplier to whom the payment relates. The system will intelligently calculate whether it is a member reference or supplier reference based on the Payment Type. If you are not sure of the reference simply leave it blank and press TAB to activate the relevant member or supplier find screen to locate the required record by other means such as name. Once a record has been found the relevant member name or supplier company name will be displayed on the payments screen beside the reference.

Regarding

Use the regarding field to indicate the reference number of the booking or event to which the payment relates. The system will intelligently calculate whether it is a booking reference or event reference based on the Payment Type. If you are not sure of the reference simply leave it blank and press TAB to activate the relevant booking or event find screen to locate the required record by other means. Once a record has been found the relevant event name will be displayed on the payments screen beside the reference. If the payment type is such that the payment does not relate to either a booking or an event then the cursor will not be allowed into the regarding field during editing.

Payment Ref

Each new payment inserted will automatically generate a unique payment reference number. This number is sequential and is incremented each time a new payment 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 payments are listed in payment reference order. This may be because the supplier has been deleted or because when a user started to enter new payment 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 payments simultaneously.

Date

Date indicates the date that the payment was made.

Amount

Amount indicates the payment amount. The payment amount cannot be zero or negative.

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 (e.g. 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.

Use

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 e.g. 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 which will be included on the credit note printed.

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 (e.g. event cancellation) the gross amt is automatically calculated as the amount 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, they may be edited and you may delete your own letters at any time.

Subject

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

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 are 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 print dialogue screen will appear giving you the chance to preview the letters to screen before printing if required. When the letters have been printed 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 print dialogue screen will appear giving you the chance to preview the letters to screen before printing if required. When the letters have been printed 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 print dialogue screen will appear giving you the chance to preview the letters to screen before printing if required. When the letters have been printed 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 print dialogue screen will appear giving you the chance to preview the letters to screen before printing if required. When the letters have been printed 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 notes, the print dialogue screen will appear giving you the chance to preview the credit notes to screen before printing if required. When the credit notes have been printed 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 (e.g. 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 (Pro Edition)

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 in the Pro Edition of Book-It only. 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 (e.g. Newspaper advertisement)

Notes

Detailed information about the source of contact for reference purposes (e.g. 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 (Pro Edition)

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

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.

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.

Name

Enter the name of the main user, or senior staff member responsible for the system in the standard name format i.e. salutation (e.g. Mr, Mrs, Dr etc.), first name (e.g. Dave) and finally last name (e.g. 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.

Reg No

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

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 your mobile telephone number

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	\$

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 (e.g. for letters written in a non-English 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 (e.g. for letters written in a non-English language) then enter the new text in the Letter End Text area.

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.

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.

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 of the month 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.

Member Fee

Use the member fee field to enter the typical subscription fee paid by members when joining and at renewal. This figure is simply a default to reduce typing and can be overtyped on the renewal screen on an individual basis as required.

Pay By

This indicates the most common method of payment for payments made to the club / organisation. As with the member fee it is simply a default to reduce typing and can be overtyped on various screens used to record payments as required.



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, containing only key values such as reference numbers etc., 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 cannot 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 button on each Book-It 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	- members booked (office use)
Event Booking Details	- brief members booked details
Event Booking Limited Address List	- members booked (member use)
Event Cost Analysis	- event profit / loss costing (Pro Version)
Event Summary	- condensed event information
Overdue Deposits And Balances	- overdue booking payments (Pro Version)

Suppliers

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

Payments

Payment Detail	- detailed payment information
Payment Summary	- summarised payment info (Pro Version)

Credit Notes

Credit Note Detail	- detailed credit note information
Credit Note Summary	- summarised credit note info (Pro Version)



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 Set-up 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 or even 16Mb under Windows 95 if you expect to have multiple applications open simultaneously. RAM upgrades to low memory systems 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 (i.e. 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 (e.g. 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 dialogue, 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 (Windows 3.1 / 3.11 Only)

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 (e.g. 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 (e.g. 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 some versions of 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. This single label printing fix is not available in Windows 95.



Registration (Lite And Pro Editions)



In order to purchase a copy of this software you are expected to send a payment to Instinctive Systems by cheque, VISA, Access, Mastercard or Eurocard. Prices are dependant upon your product requirements, number of users, support level required, method of payment etc. Please contact Instinctive Systems for further information. In exchange for your payment you will receive a registration code from Instinctive Systems that will unlock any limitations that may have been in force in evaluation editions of the software and will modify the software to indicate that the software is registered to you on various screens and reports. This registration code is calculated from the company name and user name that you have set up in the Miscellaneous, User Details screen. We advise you not to change these details after registration or a new registration code will be required.



Editions

In order to make Book-It as flexible as possible in terms of method of distribution and user requirements, the product is currently available in 3 Editions - Retail Lite, Retail Pro and Shareware. These editions are detailed below

Lite Edition

The Lite Edition is the entry level product in the retail sector. This edition is proactively marketed by Instinctive Systems and therefore attracts costs which must be reflected in the product price. The Lite Edition has the following features

- Basic product feature set
- Multi-user network use option available
- 3 levels of support agreements available depending on user requirements

The Lite Edition is aimed at the more serious individual or small business. An upgrade path is provided from the Shareware Edition if required.

Pro Edition

The Pro Edition is the professional edition of Book-It. It provides the richest feature set available. In addition to all the features available in the Lite Edition, the Pro Edition also includes the following

- Ability to add and customise contact sources
- Ability to add and customise event categories
- Detailed event cost analysis report
- Overdue deposits and balances report
- Payment summary report
- Credit note summary report

The Pro Edition is aimed at the professional user who requires the maximum feature set and levels of support available from Book-It. An upgrade path is available from both the Shareware and Lite Editions if required.

Shareware Edition

This edition is primarily aimed at small users with limited revenue available. It is distributed around the world through relatively inexpensive shareware distribution channels. Due to the low marketing and support costs involved in this method of distribution we can therefore offer the product at extremely competitive prices. The Shareware Edition currently contains the same feature set as the Lite Edition with the following exceptions

- Only single user Shareware Editions are available
- Support correspondence is limited to mail, fax or email
- Support turnaround is typically of the order of 3-7 working days

It is expected that with future upgrades more new features may be introduced into the Lite and Pro Editions than the Shareware Edition. The Shareware Edition is recommended for low

budget individuals involved in home / hobby activities. It is not recommended for businesses who require an improved feature set, network access and more thorough support.



Other Products And Services

The following products and services are also available from Instinctive Systems at this time.

Bespoke Programming Work

Instinctive Systems will undertake bespoke programming work for your organisation regardless of whether or not that work involves the use of Book-It software. Please call or write for further details.

Customised CD-Front End Development

Do you have a simple data file that you would like to market to your own customers but do not have the time or the knowledge to develop a sophisticated front end to view and report the data? Then why not talk to us? Book-It code has been written in a very reusable fashion so that we can easily reuse its tools such as navigation, find, sort, order, view, report etc. with very little reprogramming. If your data file is a simple flat file system you might be surprised how quickly and cost effectively we can develop a CD front end, for example, that wraps around your own data but has much of the functionality of the Book-It software.

Business Consultancy

Instinctive Systems also provides Business Consultancy services. We can assist companies to enhance their performance, productivity and customer service, by making the most of their resources. We can help clients to :

- Identify key business objectives
- Audit existing operations
- Identify potential concerns and areas for improvement
- Design and implement improvement programmes
- Train and develop staff

IS believes in working closely with a client's staff to ensure that they are fully involved in any changes that may be recommended. We provide a personal flexible service to meet the clients' individual requirements, with a written report provided for all consultancy work. Assistance with the implementation of recommendations is also available, if required.

IS consultants have worked for a number of 'blue chip' companies both in the UK and abroad and has a wide range of experience across a number of industries. All recommendations and advice is objective and impartial. All work is conducted in carefully designed phases with costs, deliverables and timescales agreed in advance.

If you would like further information or wish to discuss your requirements, please contact Instinctive Systems.

BookKeeper Software

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. A Windows version may be developed in the future.



Support (Pro And Lite Editions)

30 days free support is included when you purchase a new Instinctive Systems product. Further support after this period is chargeable in order for us to keep our product prices to a minimum. A range of annual support agreements are available to cater for different customer requirements as detailed below. We reserve the right to change these agreements at any time.

Basic Level

This entry level agreement is aimed at individuals and small businesses with limited budgets who require the most basic level of support.

- supported 10am - 4pm GMT Monday to Friday
- up to 7 hours annual support included (min call 15 minutes)
- additional hours charged at preferential rates
- response time will be guaranteed within 16 working hours.
- telephone, fax, email, mail and remote modem support included

Standard Level

The intermediate level of support is aimed at small to medium sized businesses who require a little more support than provided in the basic support agreement. This level of support means that more calls can be taken and the system is likely to be down for a lot less time than the basic agreement in the event of problems.

- supported 10am - 4pm GMT Monday to Friday
- up to 14 hours annual support included (min call 15 minutes)
- additional hours charged at preferential rates
- response time will be guaranteed within 8 working hours.
- back-up and restore support is included
- annual input into the Book-It development programme

Advanced Level

- all features of level 1 support
- free software upgrades as new versions available
- priority upgrades and inclusion in beta testing scheme

Support Without An Agreement

Support will still be provided without an annual support agreement, however, this will be instantly chargeable. A minimum charge will be made for each call and further charges will be applied in 15 minute increments. A purchase order number or credit card number may be requested.

Please contact Instinctive Systems for further details regarding support. When calling for support, 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 email address if applicable
Clear details of your problem

For certain problems it may also be useful if you include copies of key system files such as C:\AUTOEXEC.BAT, C:\CONFIG.SYS, C:\WINDOWS\WIN.INI, C:\WINDOWS\SYSTEM.INI etc.



Software Faults

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 problems 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 upgrade 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 items. This list is not in any specific order.

- further speed improvements for large systems
- membership analysis report
- supplier past events analysis report
- enquiry and member source analysis report
- standard renewal follow up letter facility
- personalised company name stationary on many letters / reports
- event booking reservation facilities
- graphical reporting facilities
- member / supplier photographs
- filter for balances due
- standard letter for balances due
- password and encryption security features
- barred / deceased / transferred member status
- re-usable user-defined filters
- addition user-defined fields
- audit trail
- improved standing order / direct debit handling
- more export facilities
- Word macros
- accounts day book
- multi-level event and subscription pricing

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 ensure that on most occasions the new facilities most [requested](#) by our registered users are the first to be developed, however, customers can pay to move items to the top of the development list if required. Please contact Instinctive Systems for more information. For details of items that were previously on this list but have now been incorporated into the latest version of Book-It, see the [Whats New](#) section of this help guide..



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!

