Blue Ribbon Sports

Training and Practice

System User Manual

PRIME SYSTEMS SOLUTIONS

Tables of Contents

System Overview

The inception of this project began on January 25, 2014 upon receipt of an invitation from Blue Ribbon Sports Training and Practice to determine if a software system could be developed to satisfy their business needs.

After reviewing the objectives with representatives of Blue Ribbon Sports Training and Practice, we became engaged in the Study Phase of this project. During this phase, we initiated a PIECES framework analysis which revealed the underlying causes and effects of the issues Blue Ribbon Sports Training and Practice had brought to our attention. After careful consideration, we provided a proposal to Blue Ribbon Sports Training and Practice which was accepted. We became engaged to provide you with a tailor made software system on February 27, 2014.

Focusing on the specific areas of scheduling, operations management, and record retention we began the task of designing the software. We developed the Blue Ribbon Sports system based on our observations and interviews with customers, users, managers, and owners of Blue Ribbon Sports. We presented the design to Blue Ribbon Sports on April 1, 2014. Your response to the interactive, enhanced graphic design and technical layout of the system was an approval to begin the Implementation phase of this project.

Applying technical skill and expertise, the construction of the system design began. The software system was built and has undergone multiple tests to ensure the quality of the system not only meets but exceeds the pre-determined benchmarks. The system is now ready to be delivered and our technical staff will be on-site to provide training and support during the implementation of your system.

System Overview

The custom system built for Blue Ribbon Sports Training and Practice provides the following:

Role based user access control

83 User Friendly Screens

Management Features which include

Product Management

1. Maintain Inventory
2. Maintain Product Information
3. Vendor Records (Create and Update)

Administrative Procedures

- Personnel administration
- Client Administration
- Contract Administration
- Facility Maintenance

Billing

- Generate Monthly Bills
- Generate Payments to Instructors
- Generate Payments to Vendors
- Apply Received Payments

Reservations

- Create, View, Update
- Process Payments

Sales

- Create New, Sales
- Special Orders (Create New, View, & Process Payments)

12 Reports

- Sales Revenue (by Date Range)
- View Reservations (by Date Range)
- Services Revenue (by Date Range)
- Client Check-In Report
- Inventory Levels
- Outstanding Orders
- Inventory Analysis
- Received Revenue
- Outstanding Revenue
- Outstanding Special Orders
- Past Due Accounts
- Marketing Coupon Analysis

Employee Features which include

1. Reservations - Create, View, & Update
2. Sales (Create New & Create Special Orders, View, & Process Payments)
3. Client (Creation, Update, View, and Emergency Contact Update)

System Overview

Special Features include:

- Encrypted Passwords
- Guest Check In/Out System
- Message of the Day (Post News, Activities, Functions, or Greetings to All Users)
- Vendor Contact Record Retention
- Automated Bill Generation
- 12 Reports to include: Outstanding Revenue, Received Revenue, Sales, Past Due Accounts

Today, May 5, 2014, Prime Systems Solutions is proud to present Blue Ribbon Sports Training and Practice with their software system incorporating the technical expertise and custom designed graphics created to enhance their business operations, needs, and practices.

System Requirements

- In order to run the system, a server will be required that is capable of running:
  - Apache v2.2+
  - MySQL v5.4+
  - phpMyAdmin v4.1.8
  - PHP v5.4
- Workstations access system via browser.
- Recommended Browser: Chrome v34+
- Supported browsers:
  - Firefox v29
  - Chrome v34+
  - Internet Explorer v11

Setup Instructions

- Installation of Apache, PHP, and MySQL should be performed on the server prior to attempting to install the system.
- A creation script has been provided for the database that can be run using the PHPMyAdmin software to create the database to be used on the server.
- Once the server is running, the website files should be deployed in the assigned folder for the website's files.
- The system should then be ready to accept logins, be populated with data, and begin use.
  - Default Admin Account – Use this account for setup purposes only. Make sure to change the password when finished.
    - Employee ID: 1000
    - Password: password

Detailed Table Descriptions

Bill

Column	Type	Null	Default	Comments
BillID	int(16)	No		Primary Key
BillDate	date	No		
DueDate	date	No		
BillTotal	decimal(15,2)	No		

BillDetails

Column	Type	Null	Default	Comments
BillID	int(16)	No		Primary Key
ResID	int(10)	No		Foreign Key - FacilityReservation
FacRate	int(2)	No		Foreign Key - Rate
FacTotal	decimal(6,2)	No		
InstRate	int(2)	Yes	*NULL*	Foreign Key - Rate
InstTotal	decimal(6,2)	Yes	*NULL*	

Category

Column	Type	Null	Default	Comments
CatID	int(3)	No		Primary Key
CatName	varchar(255)	No		

CheckIn

Column	Type	Null	Default	Comments
CheckInID	int(16)	No		Primary Key
ClientID	int(8)	No		Foreign Key - Client
TimeIn	time	No		
TimeOut	time	Yes	*NULL*	
NumPpl	int(3)	Yes	*NULL*	

Detailed Table Descriptions

Client

Column	Type	Null	Default	Comments
ClientID	int(8)	No		Primary Key
ClientName	varchar(50)	No		
ClientType	int(2)	No		
ClientAddress	varchar(150)	No		
ClientCity	varchar(50)	No		
ClientState	varchar(2)	No		
ClientZip	varchar(10)	No		
ClientPhone	varchar(12)	No		
ClientEmail	varchar(75)	No		
EmContact1	int(8)	No		Foreign Key - EmergencyContact
EmContact2	int(8)	Yes	*NULL*	Foreign Key - EmergencyContact

ClientType

Column	Type	Null	Default	Comments
ClientType	int(2)	No		Primary Key
TypeDesc	varchar(255)	No		

CompanyContact

Column	Type	Null	Default	Comments
CoContactID	int(10)	No		Primary Key
CoCName	varchar(255)	No		
CoCPhone	varchar(12)	No		

Detailed Table Descriptions

Contracts

Column	Type	Null	Default	Comments
ContractID	int(8)	No		Primary Key
ContractType	varchar(255)	No		
ContractDesc	varchar(255)	No		
ContractStartDate	date	No		
ContractEndDate	date	Yes	*NULL*	
ClientID	int(8)	No		Foreign Key - Client

Coupon

Column	Type	Null	Default	Comments
CouponID	int(8)	No		Primary Key
IssueDate	date	No		
ExpDate	date	No		
DescCode	int(3)	No		Foreign Key - CouponDescription

CouponDescription

Column	Type	Null	Default	Comments
DescCode	int(3)	No		Primary Key
DiscPercent	double(3,2)	Yes	*NULL*	
CoupDesc	varchar(255)	No		

EmergencyContact

Column	Type	Null	Default	Comments
EmContactID	int(8)	No		Primary Key
EmContactName	varchar(100)	No		
EmContactPhone	varchar(12)	No		

Detailed Table Descriptions

EmployeeAccess

Column	Type	Null	Default	Comments
EmpID	int(10)	No		Primary Key
EmpName	varchar(100)	No		
Salt	varchar(20)	No		
Password	varchar(40)	No		
TypeUser	varchar(1)	No		

Facilities

Column	Type	Null	Default	Comments
FacID	int(3)	No		Primary Key
FacType	varchar(255)	No		
RateCode	int(2)	No		Foreign Key - Rate

FacilityReservation

Column	Type	Null	Default	Comments
ResID	int(10)	No		PK
ClientID	int(8)	No		Foreign Key - Client
FacilityID	int(2)	No		Foreign Key - Facilities
EmpID	int(8)	No		
ResDate	date	No		
StartTime	time	No		
EndTime	time	No		
CouponID	int(8)	Yes	*NULL*	

Detailed Table Descriptions

Instructor

Column	Type	Null	Default	Comments
InstID	int(8)	No		Primary Key
InstFName	varchar(50)	No		
InstLName	varchar(50)	No		
InstAddress	varchar(150)	No		
InstCity	varchar(50)	No		
InstState	varchar(2)	No		
InstZip	varchar(10)	No		
InstPhone	varchar(12)	No		
InstEmail	varchar(75)	No		
RateCode	int(2)	No		Foreign Key - Rate
Status	varchar(1)	No		

InstructorDetails

Column	Type	Null	Default	Comments
InstID	int(8)	No		Primary Key & Foreign Key - Instructor
TypeID	int(8)	No		Primary Key & Foreign Key - InstructorType

InstructorReservation

Column	Type	Null	Default	Comments
InstID	int(8)	No		Primary Key & Foreign Key - Instructor
ResID	int(10)	No		Primary Key & Foreign Key - FacitlityReseration
StartTime	time	No		
EndTime	time	No		

Detailed Table Descriptions

InstructorType

Column	Type	Null	Default	Comments
TypeID	int(8)	No		Primary Key
Sport	varchar(255)	No		

Inventory

Column	Type	Null	Default	Comments
InvID	int(8)	No		Primary Key
ProdID	int(8)	No		Foreign Key - Products
LocCode	int(3)	No		Foreign Key - Location
QoH	int(4)	No		
QoO	int(4)	No		
ReorderLevel	int(4)	No		
TargetLevel	int(4)	No		
Retailprice	decimal(15,2)	No		

Location

Column	Type	Null	Default	Comments
LocCode	int(3)	No		Primary Key
LocName	varchar(255)	No		

Notice

Column	Type	Null	Default	Comments
NoticeID	int(1)	No		Primary Key
NoticeContent	longtext	Yes	*NULL*	

Detailed Table Descriptions

PaymentMethod

Column	Type	Null	Default	Comments
PayMethID	int(2)	No		Primary Key
PayMethType	varchar(255)	No		

Payments

Column	Type	Null	Default	Comments
PmntID	int(16)	No		PrimaryKey
BillID	int(8)	Yes	*NULL*	Foreign Key - Bill *
SaleID	int(1)	Yes	*NULL*	Foreign Key - Sales *
CreditReceiptNum	int(24)	Yes	*NULL*	+
PayMethID	int(2)	No		Foreign Key - PayememtMethod
CheckNum	int(8)	Yes	NULL	^
PmntDate	date	No		
PmntAmt	decimal(6,2)	No		

*One is needed not both

+ Only needed if Payment method is Credit Card

^ Only needed if Payment Method is Check

Products

Column	Type	Null	Default	Comments
ProdID	int(8)	No		Primary Key
VendID	int(8)	No		Foreign Key - Vendor
CatID	int(3)	No		Foreign Key - Category
Description	varchar(255)	No		
UnitsMeasure	int(4)	No		
UnitCost	decimal(15,2)	No		

Detailed Table Descriptions

PurchaseOrderDetails

Column	Type	Null	Default	Comments
PoID	int(16)	No		Primary Key
ProdID	int(8)	No		Foreign Key - Products
UnitCost	decimal(6,2)	No		
Quantity	int(4)	No		

PurchaseOrders

Column	Type	Null	Default	Comments
PoID	int(16)	No		Primary Key
VendID	int(8)	No		Foreign Key - Vendor
TaxID	int(1)	No		Foreign Key - Tax
TotalPrice	decimal(6,2)	No		
OrderDate	date	No		
OrderReceived	date	Yes	*NULL*	

Rate

Column	Type	Null	Default	Comments
RateCode	int(2)	No		Primary Key
Rate	decimal(15,2)	No		
RateType	varchar(2)	No		

SaleDetails

Column	Type	Null	Default	Comments
SaleID	int(16)	No		Primary Key
ProductID	int(8)	No		Foreign Key - Products
UnitPrice	decimal(6,2)	No		
Quantity	int(4)	No		
CouponID	int(8)	Yes	*NULL*	Foreign Key - Coupon

Detailed Table Descriptions

Sales

Column	Type	Null	Default	Comments
SaleID	int(16)	No		Primary Key
ClientID	int(8)	No		Foreign Key - Client
TaxID	int(1)	No		Foreign Key - Tax
TotalPrice	decimal(6,2)	No		
SaleDate	date	No		
SaleFulfilled	date	Yes	*NULL*	

Tax

Column	Type	Null	Default	Comments
TaxID	int(1)	No		Primary Key
TaxRate	decimal(3,3)	No		

Vendor

Column	Type	Null	Default	Comments
VendID	int(8)	No		Primary Key
VendName	varchar(100)	No		
VendAddress	varchar(150)	No		
VendCity	varchar(50)	No		
VendState	varchar(2)	No		
VendZip	varchar(10)	No		
VendPhone	varchar(12)	No		
CoContactID	int(10)	No		Foreign Key - CompanyContact

BLUE RIBBON SPORTS

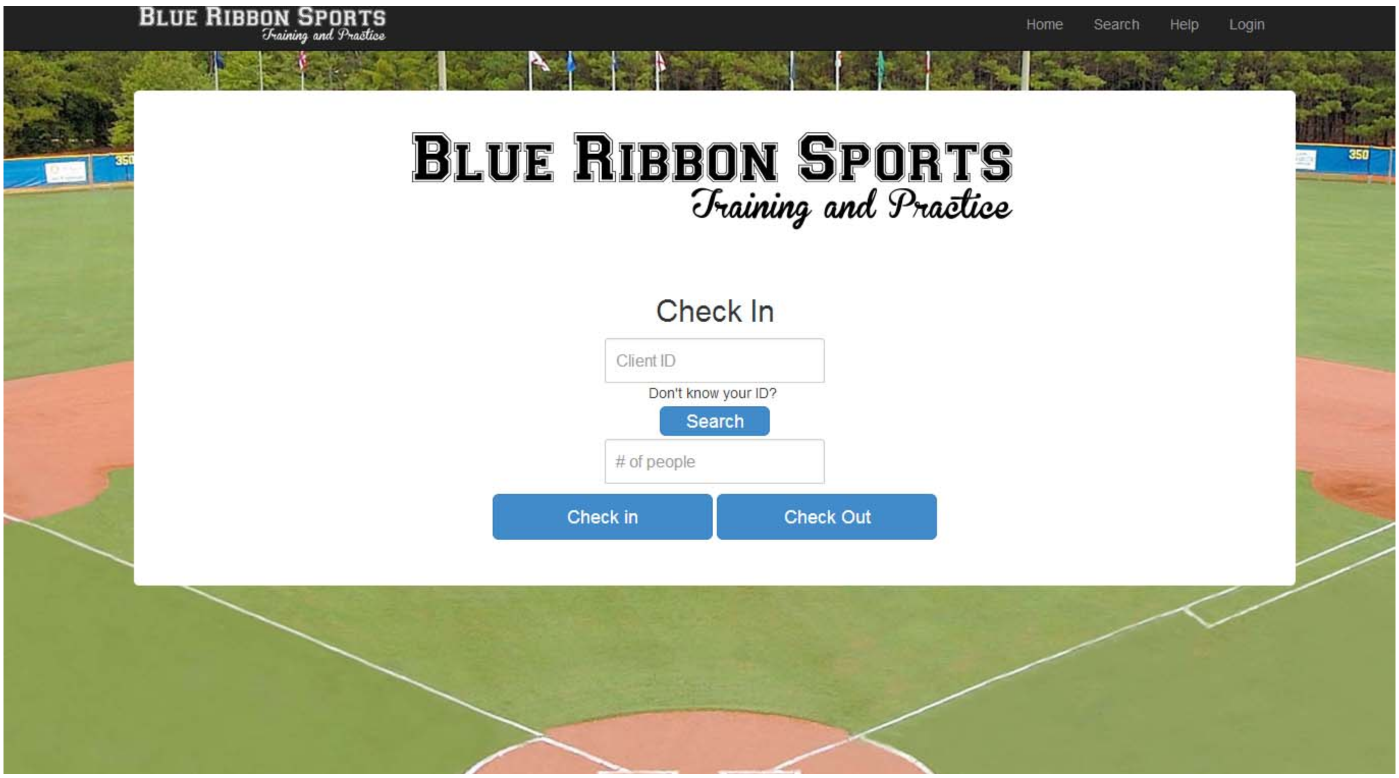
Training and Practice

System User Manual

Check-in/Check-out

Check-in / Check-out

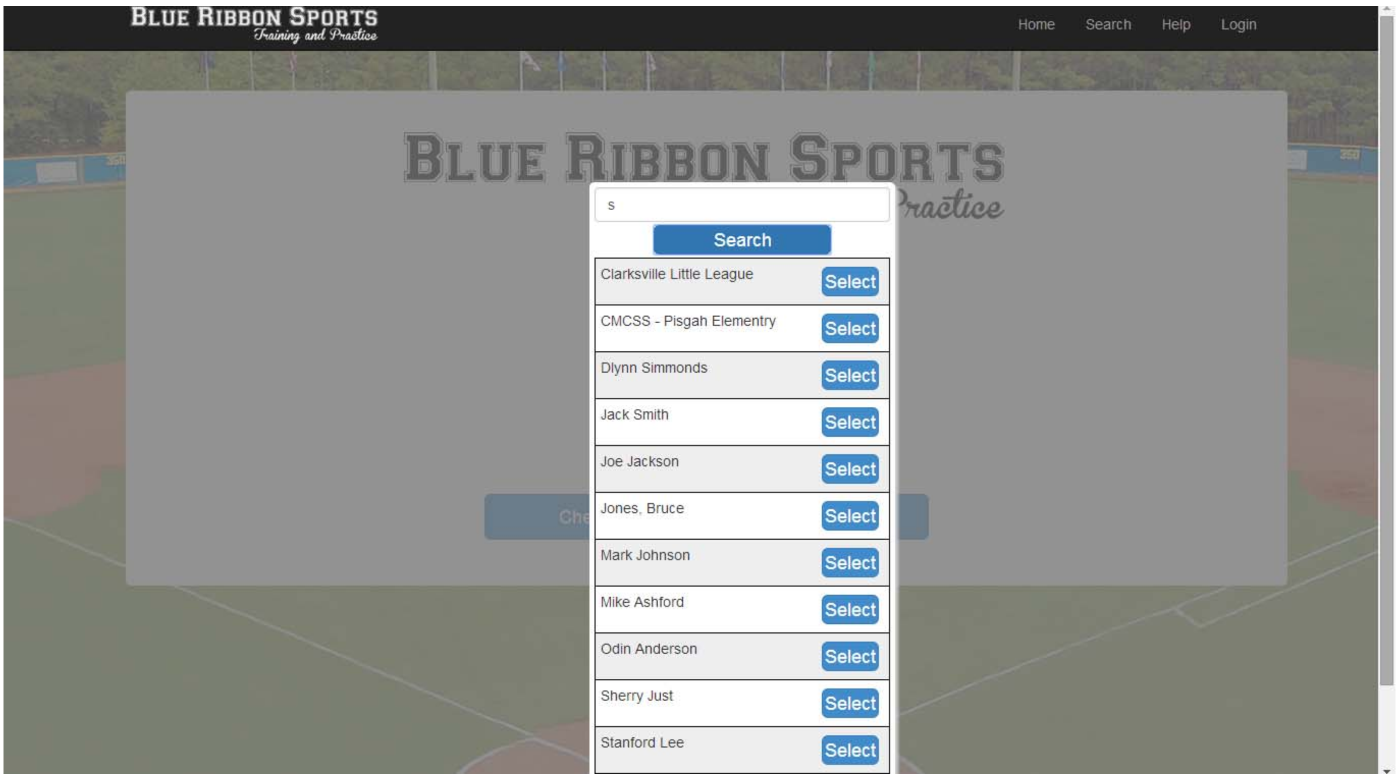
The Client Check in screen is used to check clients into and out of the facility.



1. To check in, a client should enter their ID and the number of people in their group.
2. Once complete, click the Check In button.
3. To check out, a client should once again enter their ID.
4. Once complete, click the Check Out button.

Check-in Client Search

The Check-in Client Search allows for searching for an existing Client ID when a client is being checked-in.



1. After clicking the Search button, a search field and button will appear.
2. Type in the name of the desired client and click Search.
3. A list of matching clients will be displayed. To enter the matching ID for the desired client, click the Select button next to that client's name.

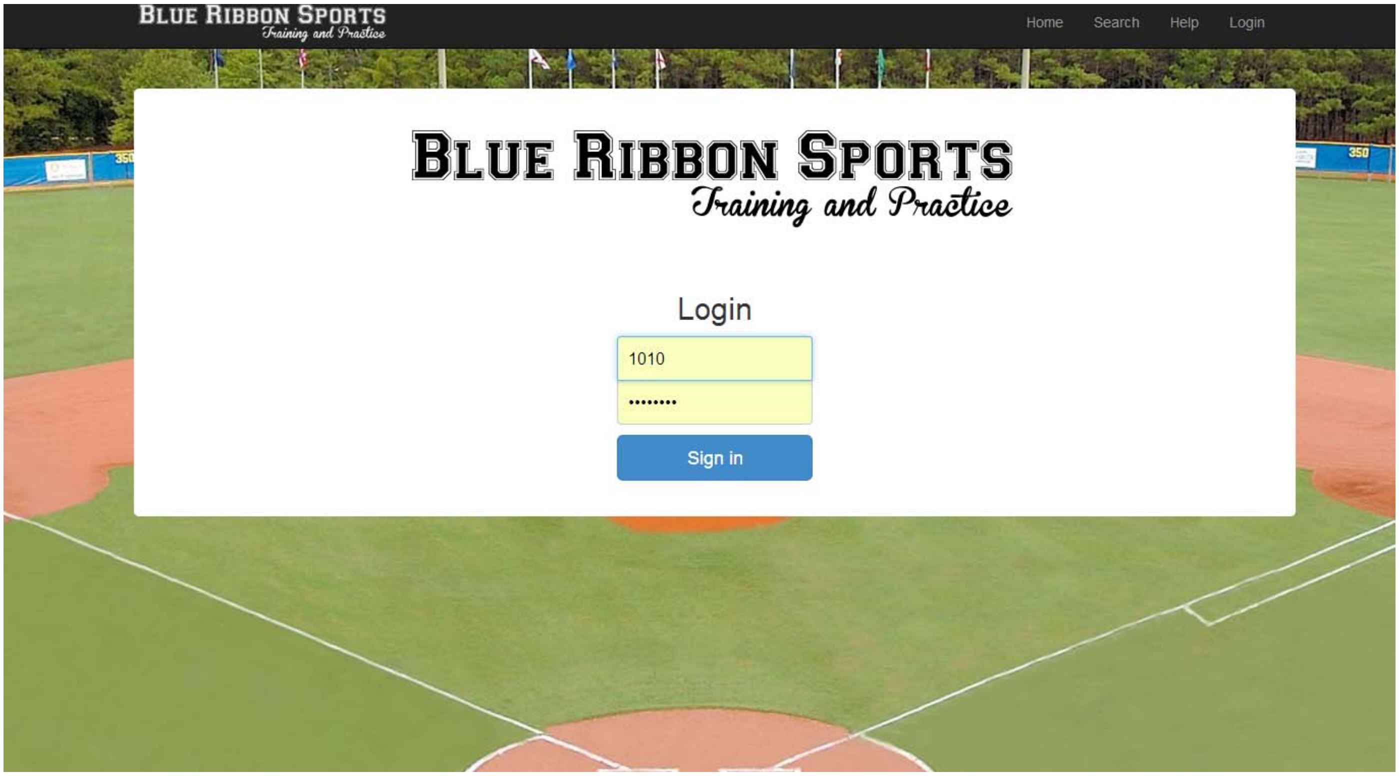
BLUE RIBBON SPORTS
Training and Practice

System User Manual

Employee Access Section

Login

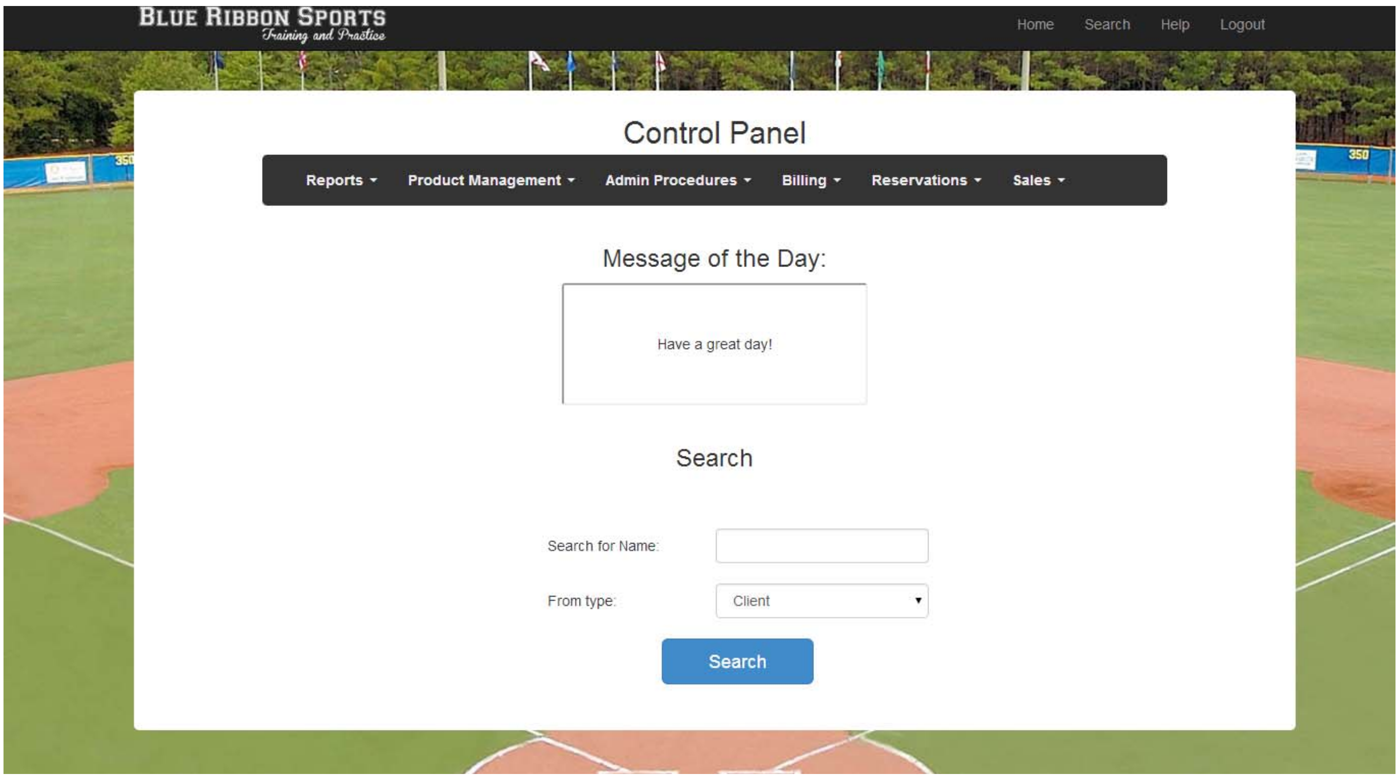
The Log In screen allows for entry into the system. The access type associated with the login ID will determine the authorized level of access. (I.E. Manager or Employee)



1. Enter your Employee ID and Password into the Employee ID and Password fields.
2. Click “Sign in.”
3. If your Employee ID and Password are correct, the Control Panel for your user will be shown. If your Employee ID or Password are incorrect, you will be shown an error and asked to re-enter the information.
4. If your Employee ID has been terminated, you will be informed and must contact a manager.

Control Panel

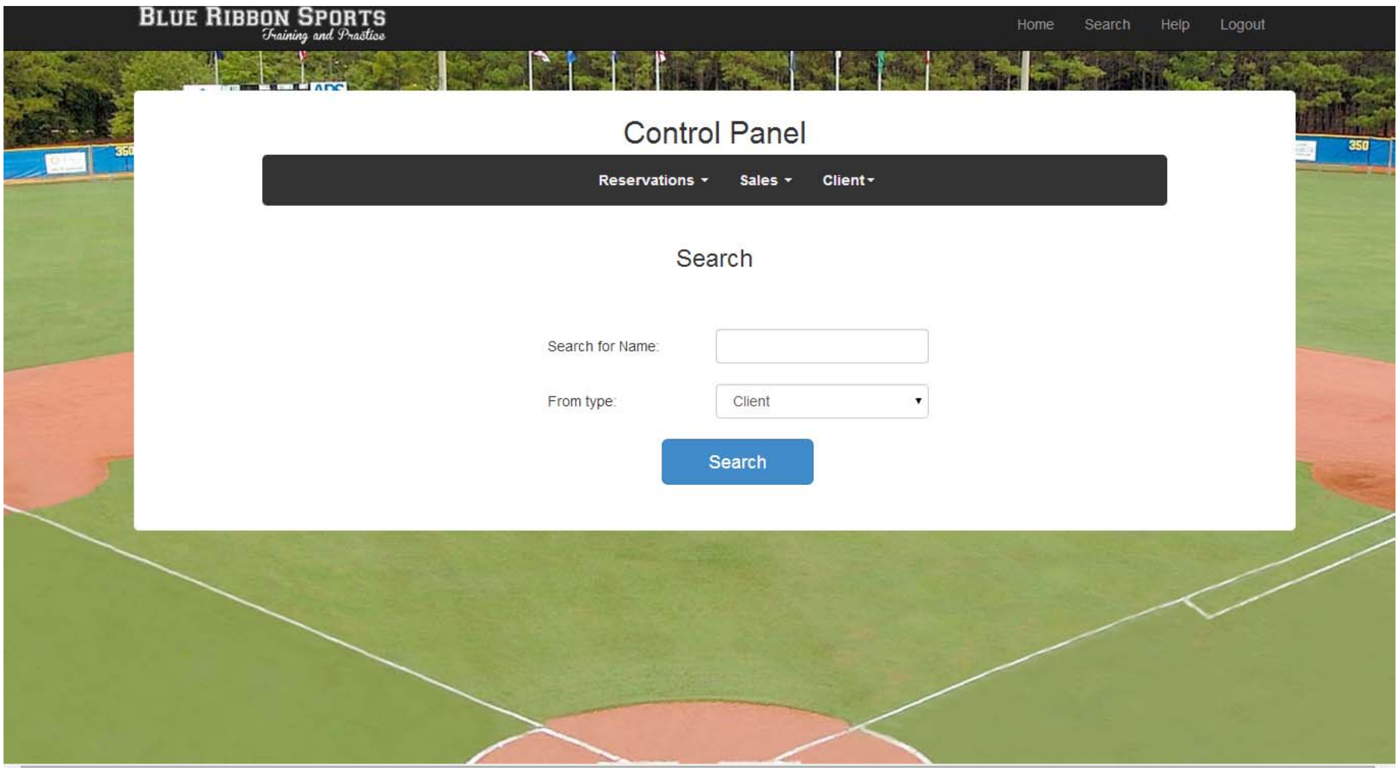
The Control Panel is the screen displayed after a successful login to the system. From this screen the user can navigate to all the part of the systems they have access to.



1. When logged in, the Home page will be the Control Panel. The System Message of the Day will be displayed, as well as a Search (Page 21).
2. In order to use the search, enter a search term in the Search for Name field, and select the type of item being searched for from the dropdown menu. Click Search to be sent to the Search Results page (Page 22-27).
3. In order to perform a system operation, use the navigation bar to select the desired operation.

Employee - Search

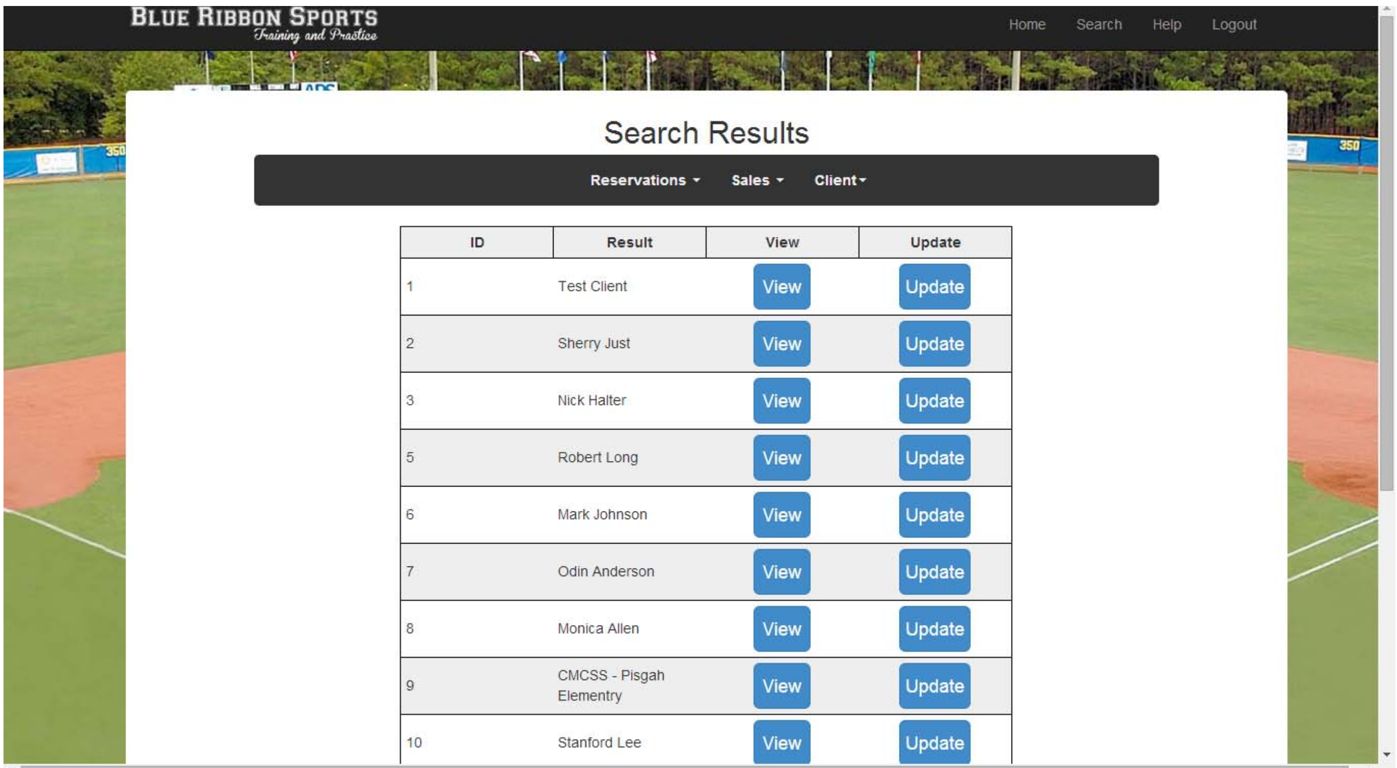
The Employee Search screen allows for searching by name for Client, Reservation by Client, Reservation by Instructor, Bill by Client, Product or Inventory



1. Depending on the type of search you wish to perform, select an option from the “From type:” dropdown, such as searching for a particular Client or Product.
2. Type the name of the desired client, instructor, product, or other record you wish to find, and click the “Search” button to be directed to the appropriate Search results page.

Search Bill by Client

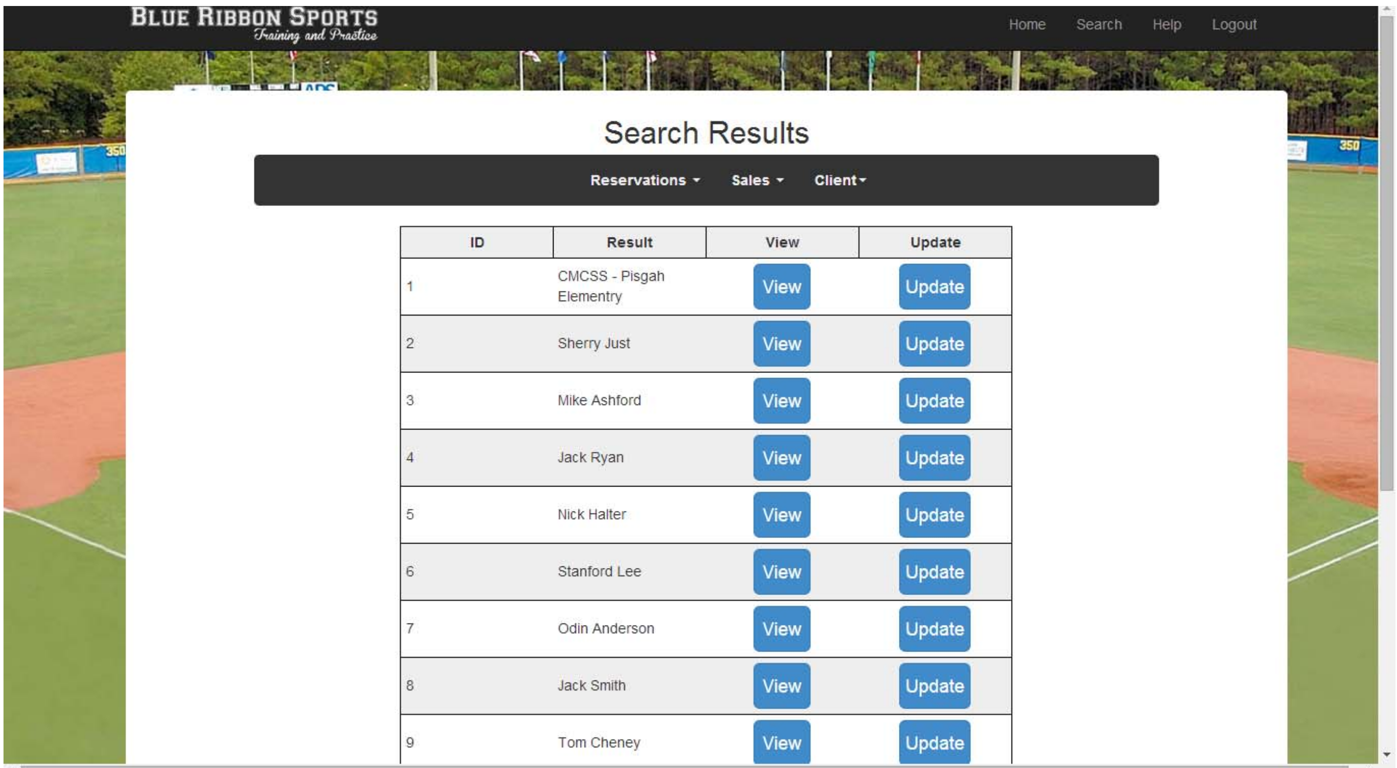
The Search Bill by Client allows for Locating a bill (invoice) by Client name.



1. The list of clients best matching the search string provided will be displayed in table format.
2. For each available client and invoice, a View and Update button are provided, allowing you to View more information about the bill, or update the details of it.

Search Client

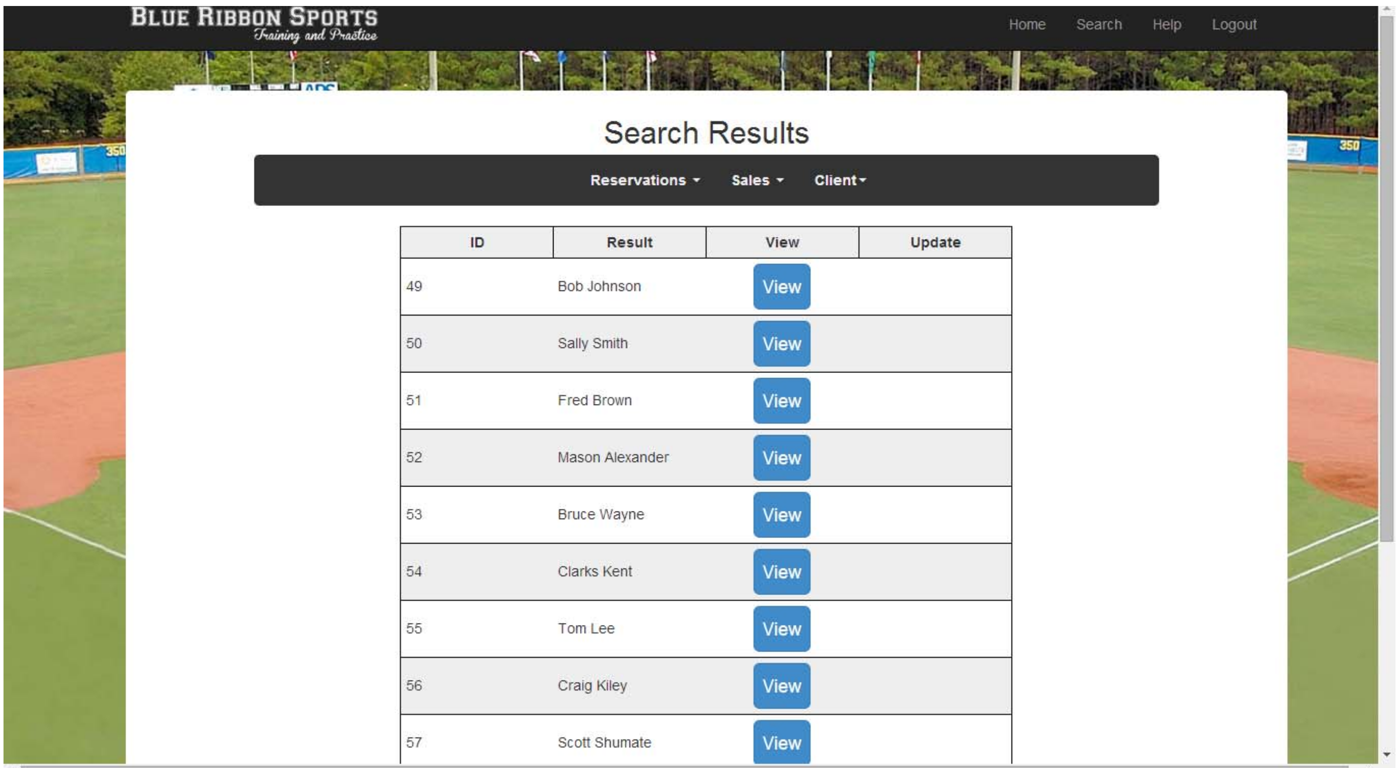
The Search Client screen allows for finding a Client Id by searching by the clients name.



1. The list of clients best matching the search string provided will be displayed in table format.
2. For each available client, a View and Update button are provided, allowing you to View more information about the client (Page 36), or update the details of it (Page 37).

Search Instructor

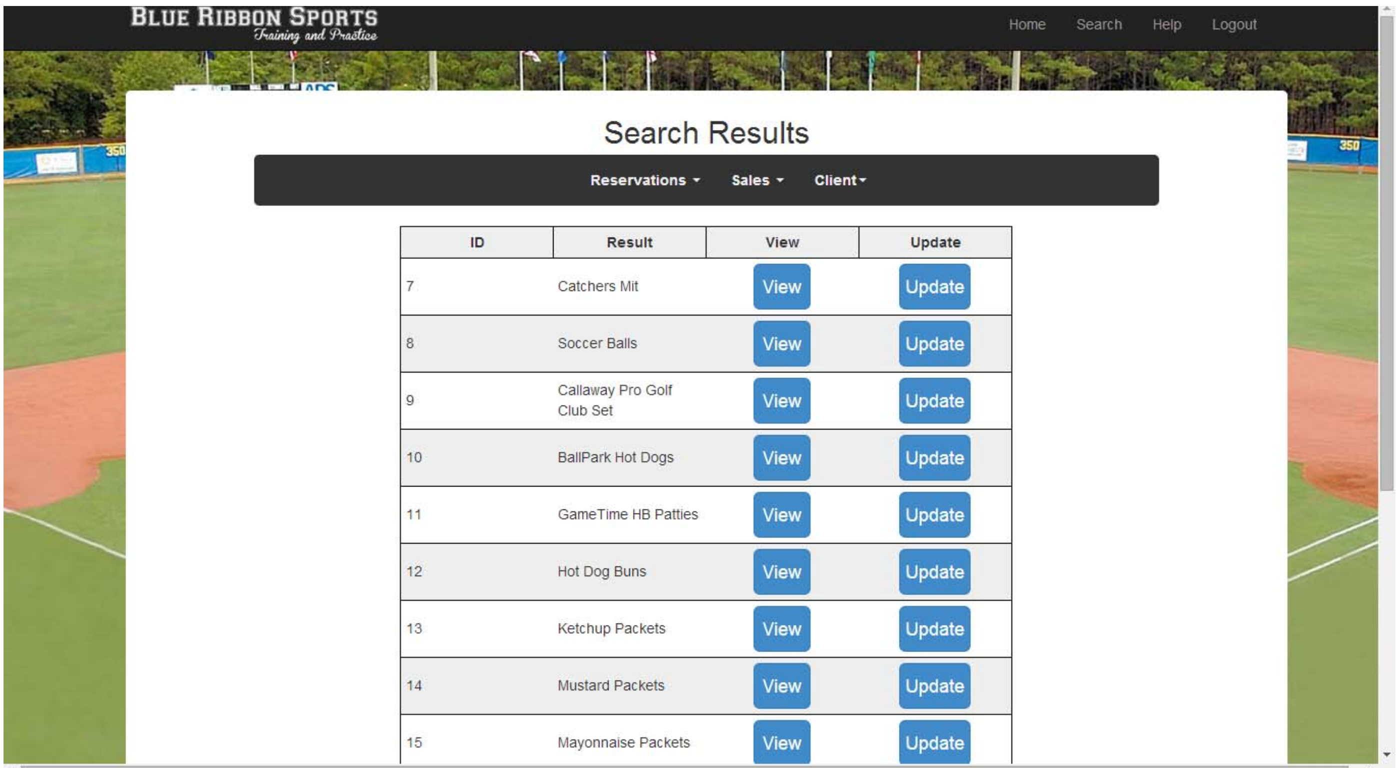
The Search Instructor screen allows for finding an Instructor Id by searching by the instructors name.



1. The list of instructors best matching the search string provided will be displayed in table format.
2. For each available instructor, a View button is provided, allowing you to View more information about the instructor.

Search Products

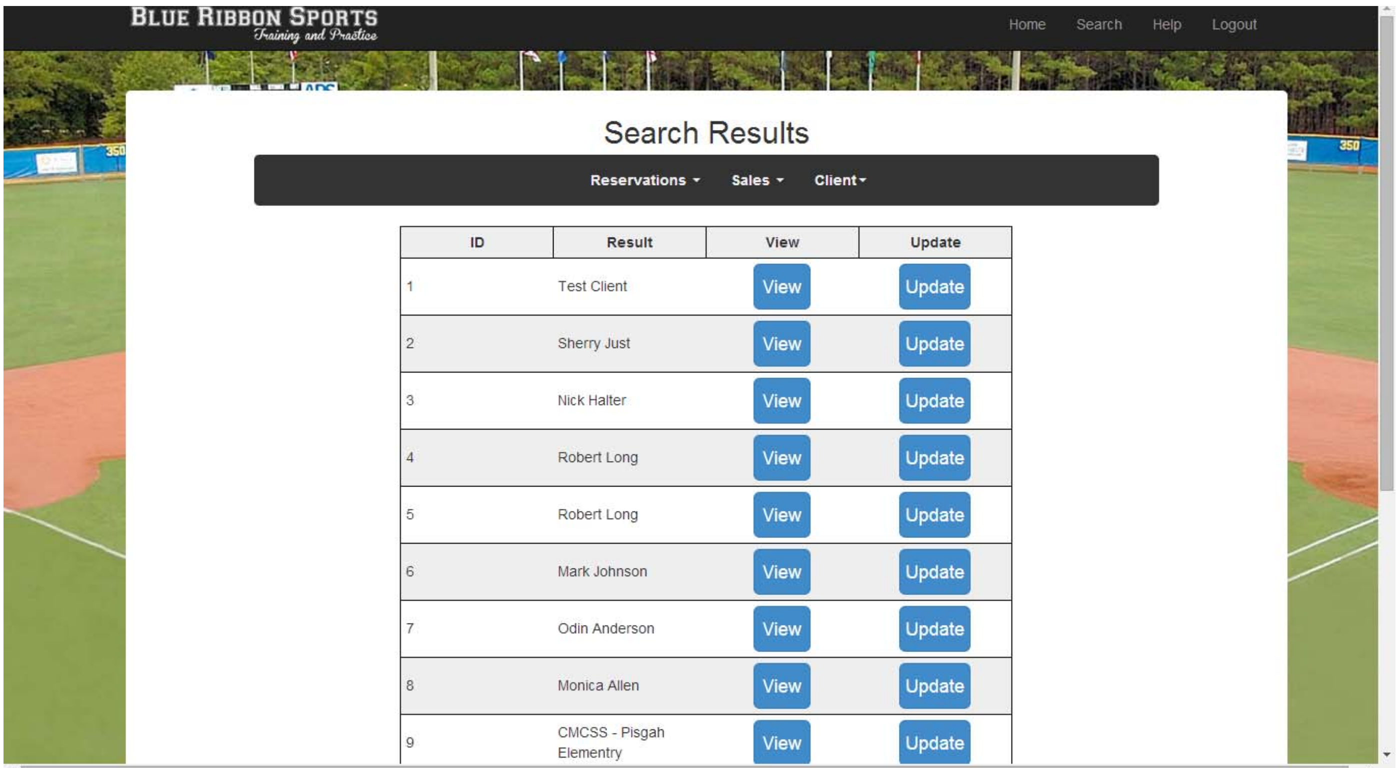
The Search Products screen allows for locating a Product Id by searching by the product name.



1. The list of products best matching the search string provided will be displayed in table format.
2. For each available product, a View and Update button are provided, allowing you to View more information about the product, or update the details of it.

Search Reservation by Client

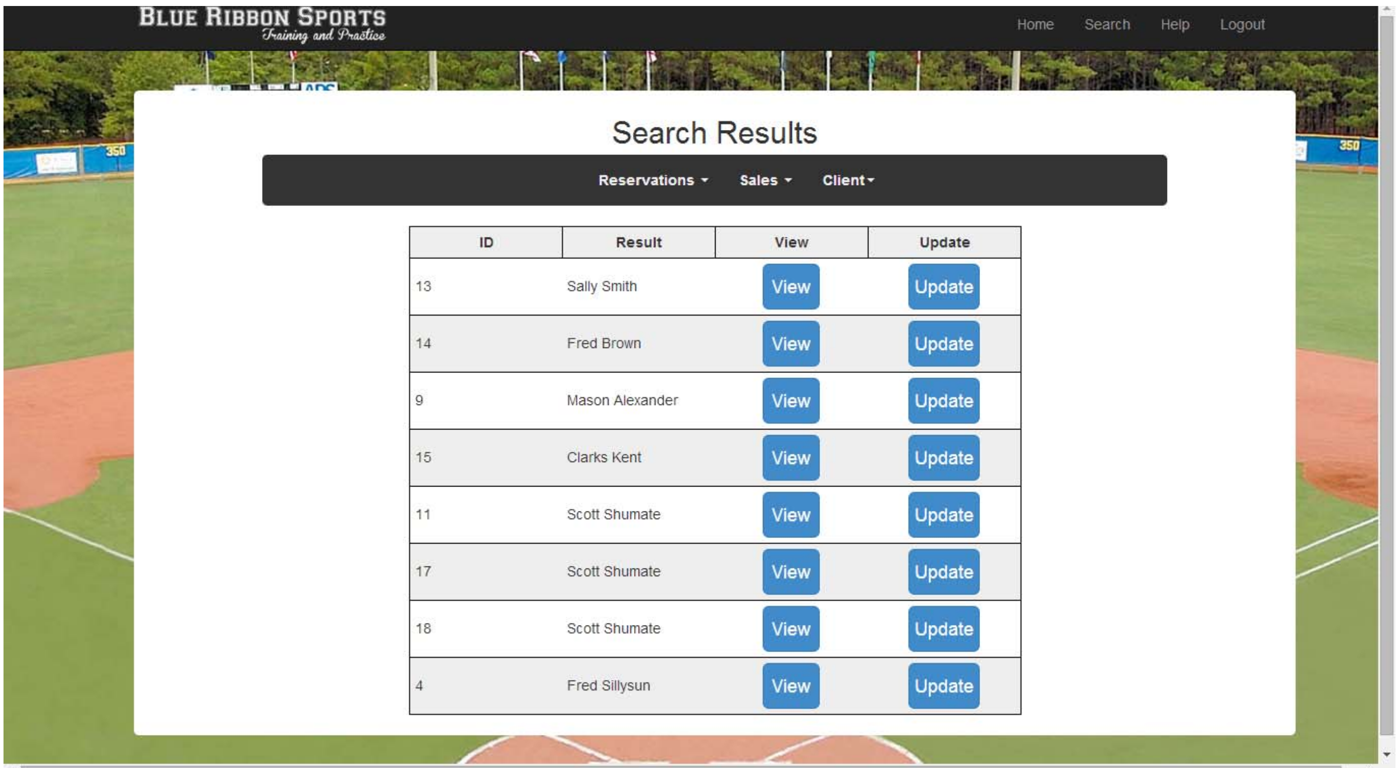
The Search Reservation by Client allows for locating a reservation id by searching by client name.



1. The list of clients best matching the search string provided will be displayed in table format.
2. For each available client and reservation, a View and Update button are provided, allowing you to View more information about the reservation (Page 31), or update the details of it (Page 32).

Search Reservation by Instructor

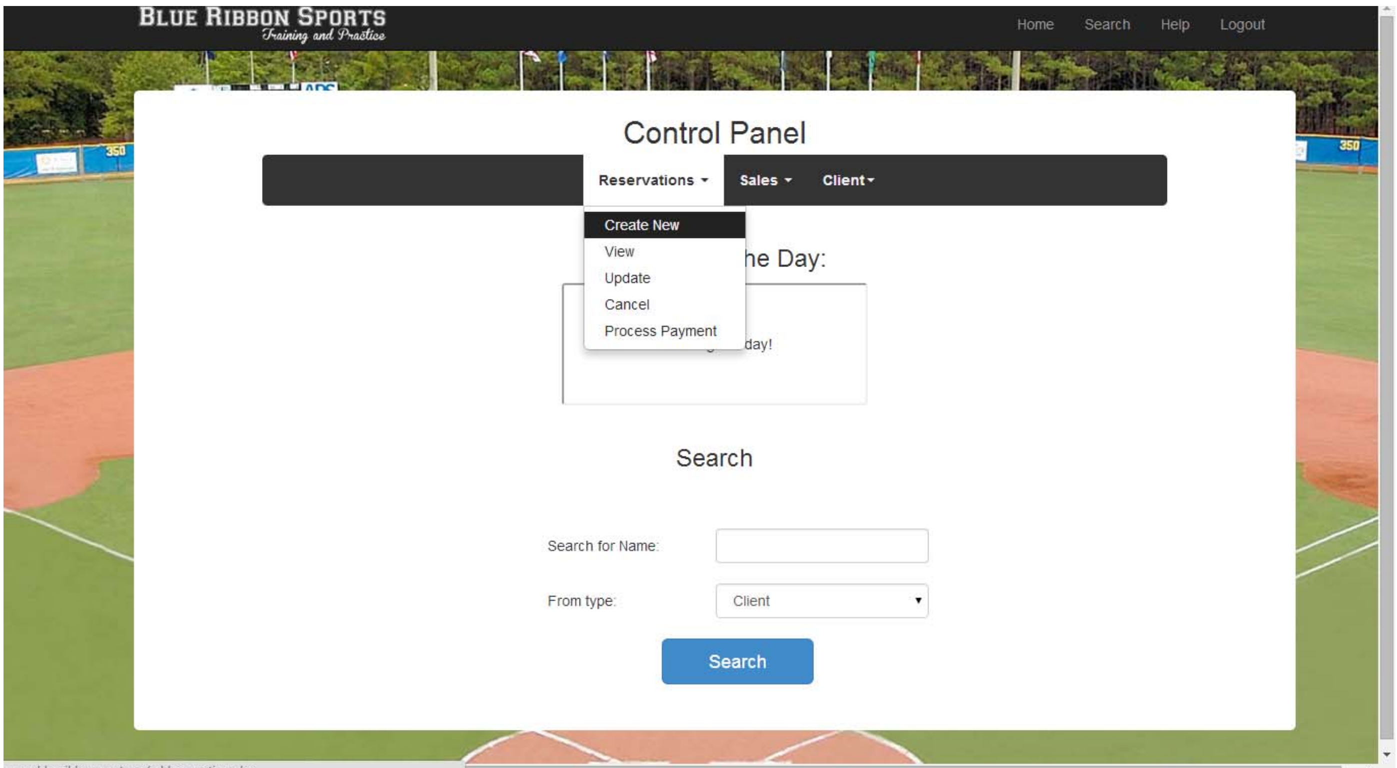
The Search Reservation by Instructor allows for locating a reservation id by searching by instructor name.



1. The list of instructors best matching the search string provided will be displayed in table format.
2. For each available instructor and reservation, a View and Update button are provided, allowing you to View more information about the reservation (Page 31), or update the details of it (Page 32).

User – Reservations Dropdown

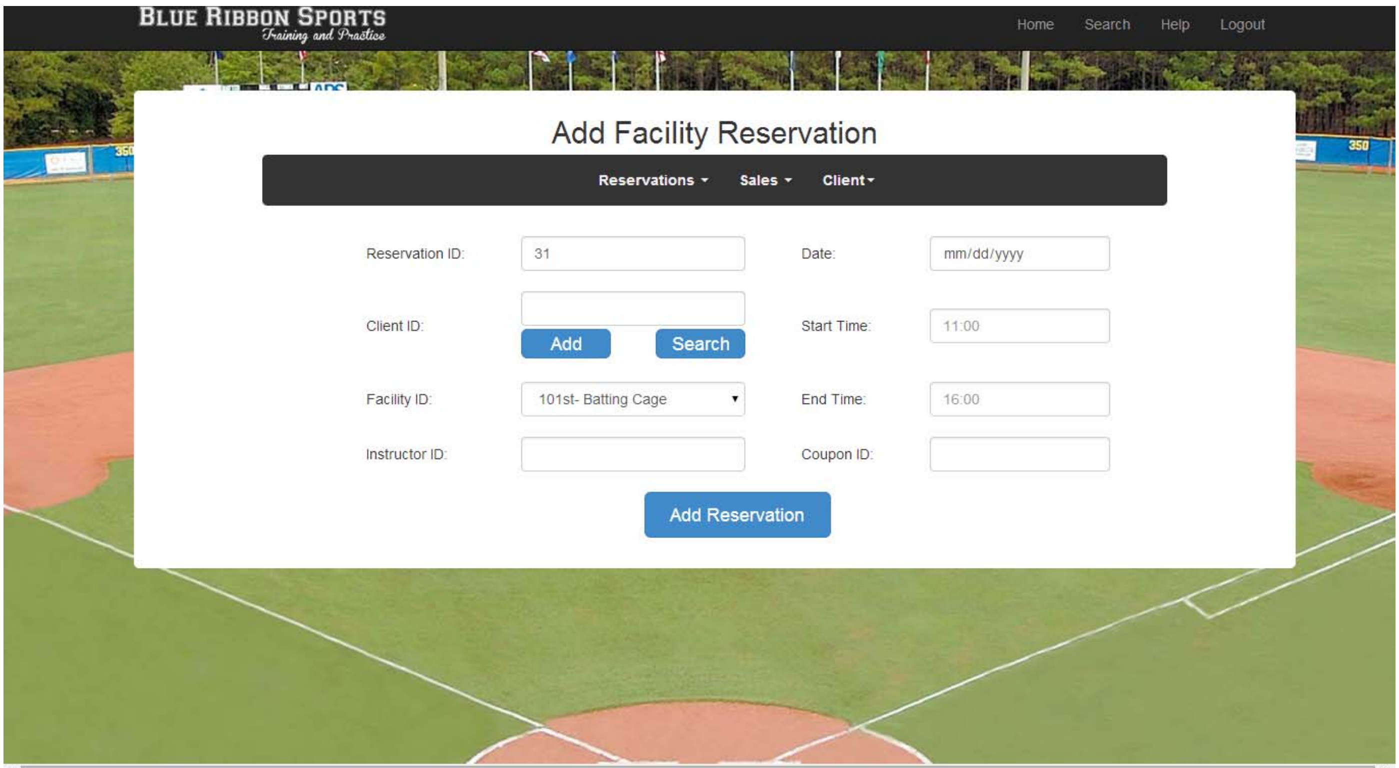
The Reservations section of the navigation bar provides access to the reservation functions contained within the system, such as creating and deleting reservations, broken down into five links.



1. To access the Reservations dropdown, click on Reservations on the Navigation bar.
2. If a small gray triangle is listed to the right of the item in the dropdown, it contains further menu options. Hover over the category to see more options.
3. Click on the desired page to navigate to it.

Add Reservation

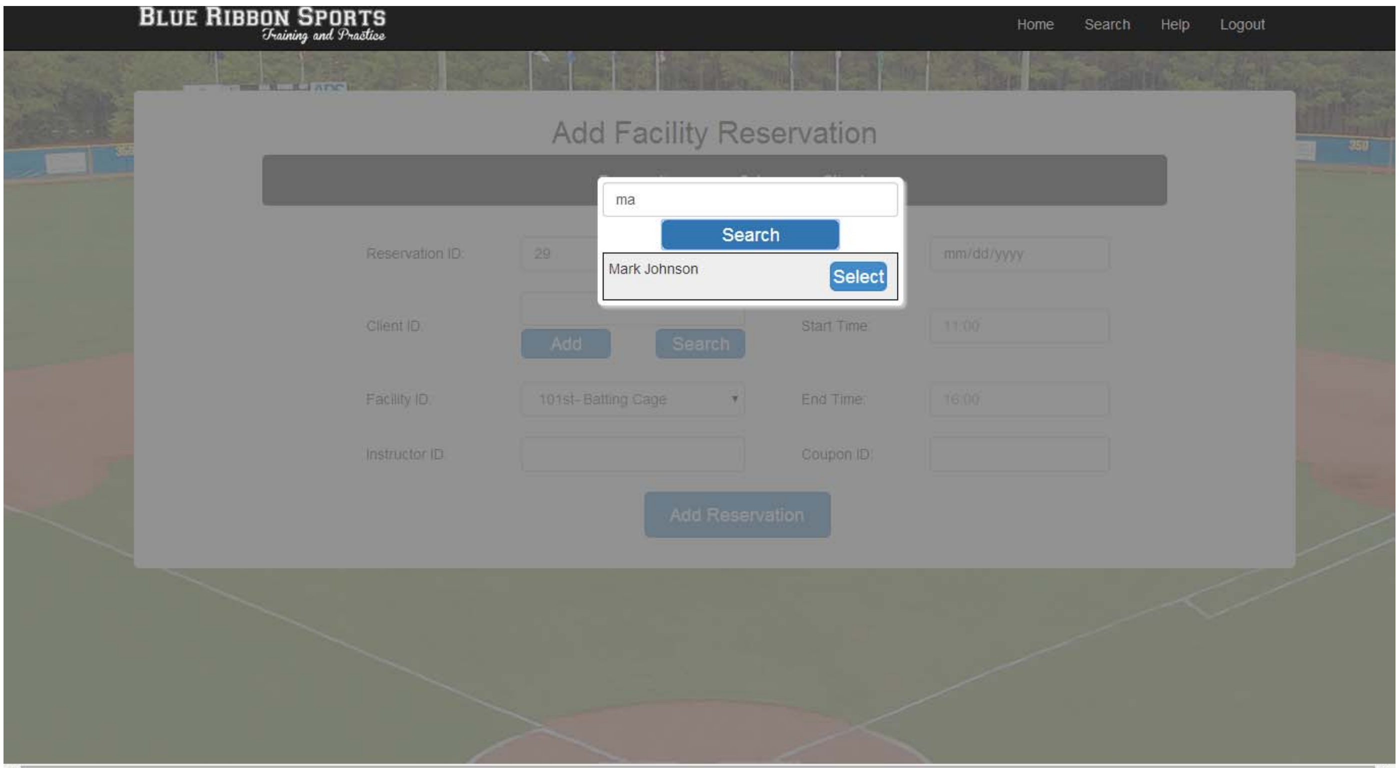
The Add Reservation screen allows for the entry of a new reservation into the system.



1. The next available Reservation ID will be populated into the form. You must then enter a Client ID, Facility ID, Date, Start Time, and End Time. If requested, an Instructor ID and Coupon ID can be entered to be applied to the reservation.
2. If the Client ID for the sale does not yet exist, click the "Add" button to be sent to the Add Client screen. If the user does not know their ID, click the Search button (See Page 38)
3. Once complete, click "Add Reservation" to create the Reservation.
4. If any required field is left blank, you will be prompted before you the Add Reservation button will function.

Add Reservation Client Search

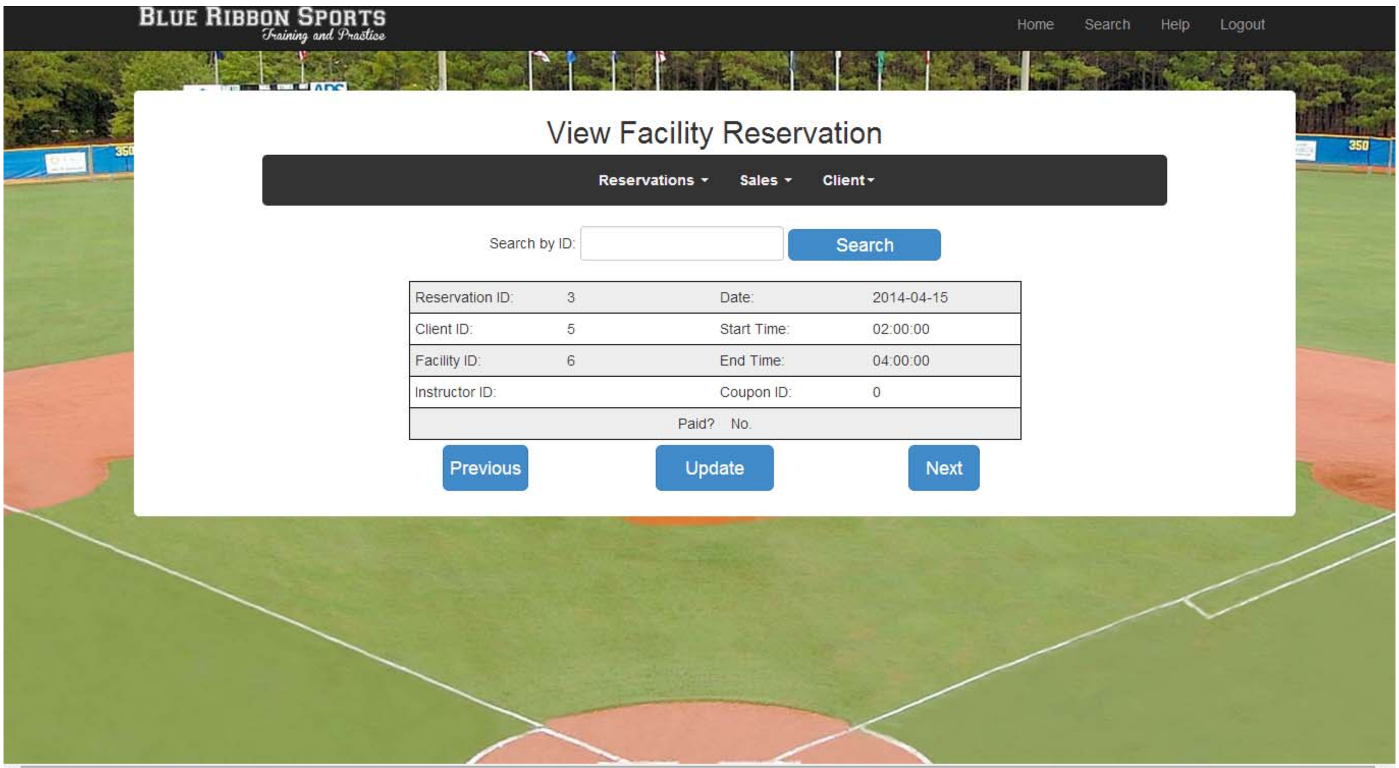
The Add Reservation Client Search allows for searching for an existing Client ID when creating a new reservation.



1. After clicking the Search button, a search field and button will appear.
2. Type in the name of the desired client and click Search.
3. A list of matching clients will be displayed. To enter the matching ID for the desired client, click the Select button next to that client's name.

View Reservation

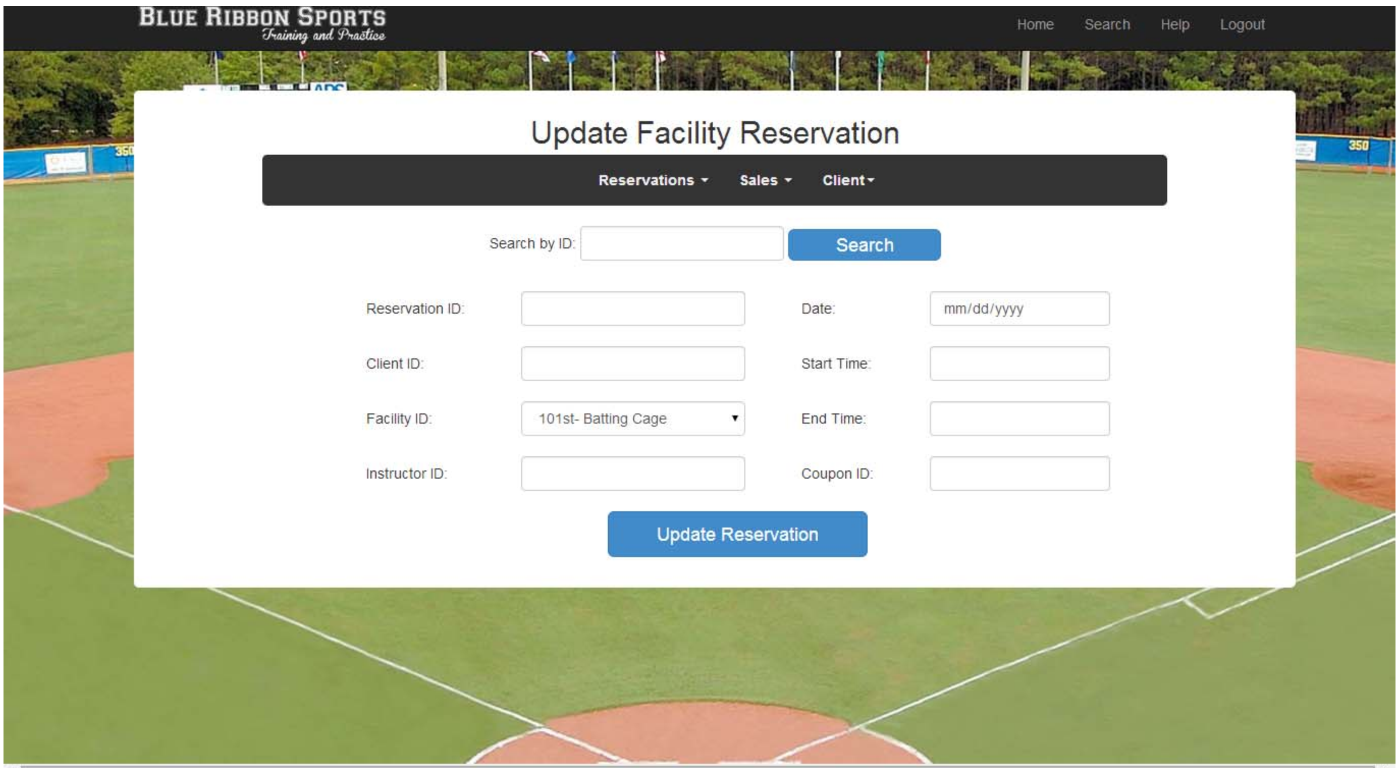
The View Reservation screen displays the Reservation ID, Facility ID, Reservation Date, Start Time, End Time, Client ID, Instructor ID (if applicable), Coupon ID (if applicable) and paid field for the selected reservation. From this screen you can navigate to the update reservation screen if needed.



1. To search for a specific reservation, enter the Reservation ID in the Search by ID field and click Search. To browse forward and backward through reservations, click on the Next and Previous buttons.
2. If the details of a selected reservation need to be updated, click on the Update button to be sent to the Update Reservation screen (Page 32) for this reservation.

Update Reservation

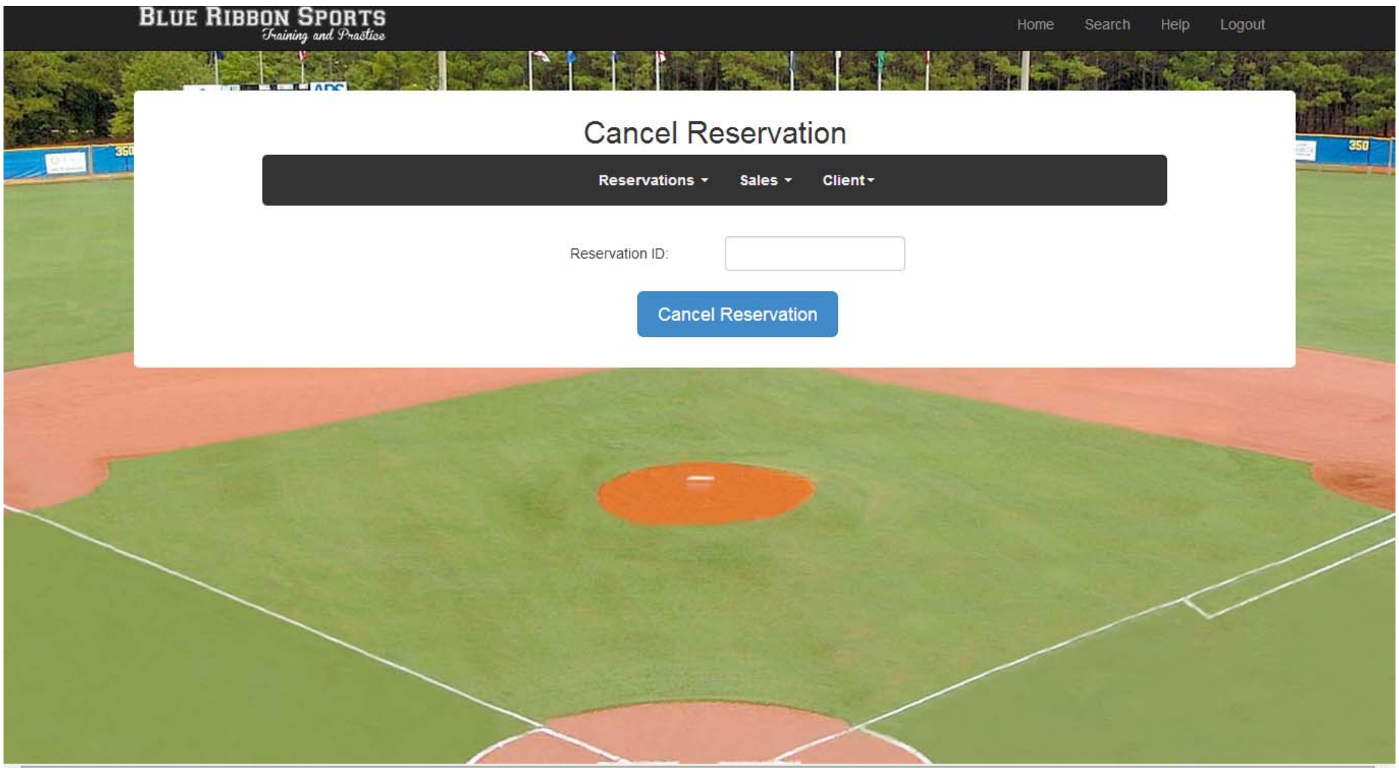
The Update Reservation screen displays the Reservation ID, Facility ID, Reservation Date, Start Time, End Time, Client ID, Instructor ID (if applicable), Coupon ID (if applicable) and paid field for the selected reservation in an editable format.



1. To update an existing reservation, enter the Reservation ID in the “Search by ID” field and click “Search.”
2. The Reservation’s current information will be loaded into the form.
3. Perform any required updates and then click Update Reservation.
4. If any required fields are left blank, you will be prompted to enter them before the “Update Reservation” button will work.

Cancel Reservation

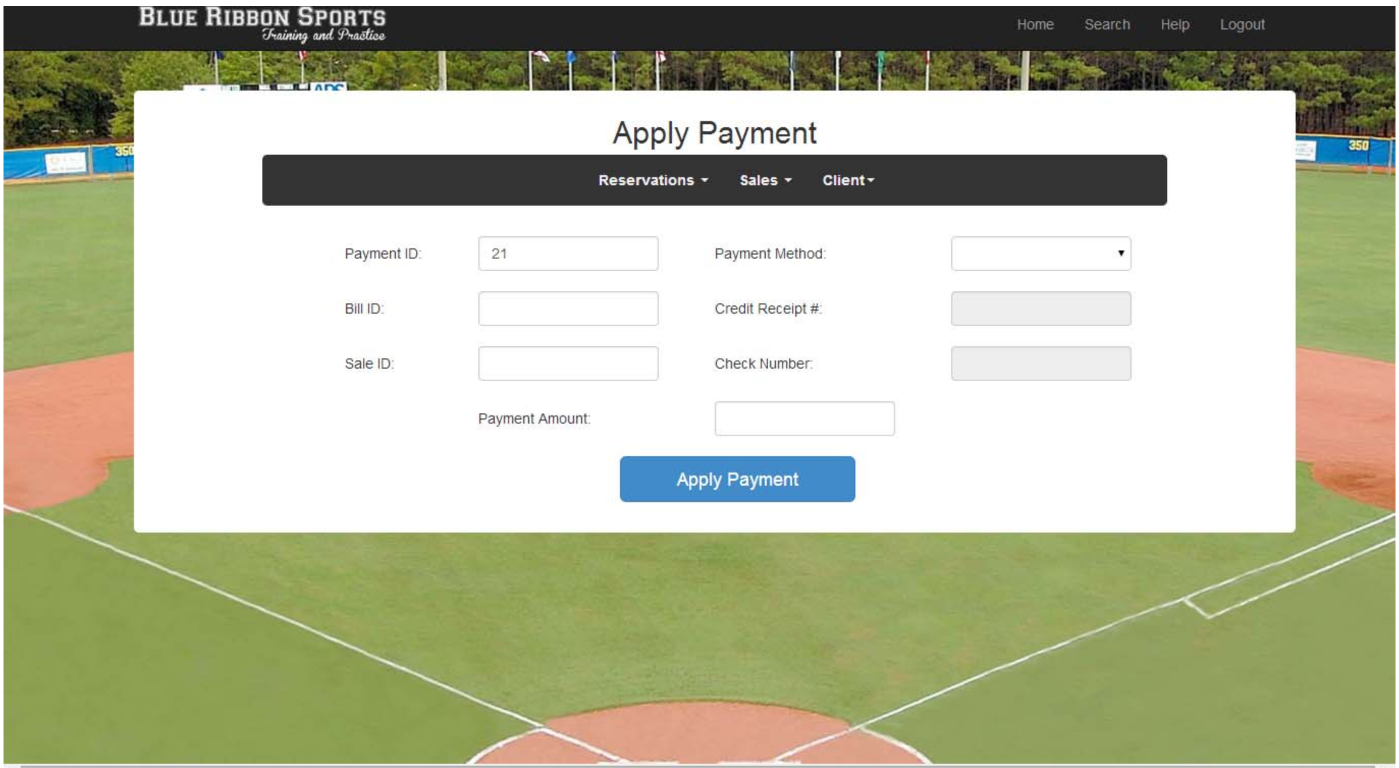
The Cancel Reservation screen allows for deleting (cancelling) an existing reservation.



1. To cancel a reservation, enter the Reservation ID into the Reservation ID field and click on Cancel Reservation.

Apply Payment

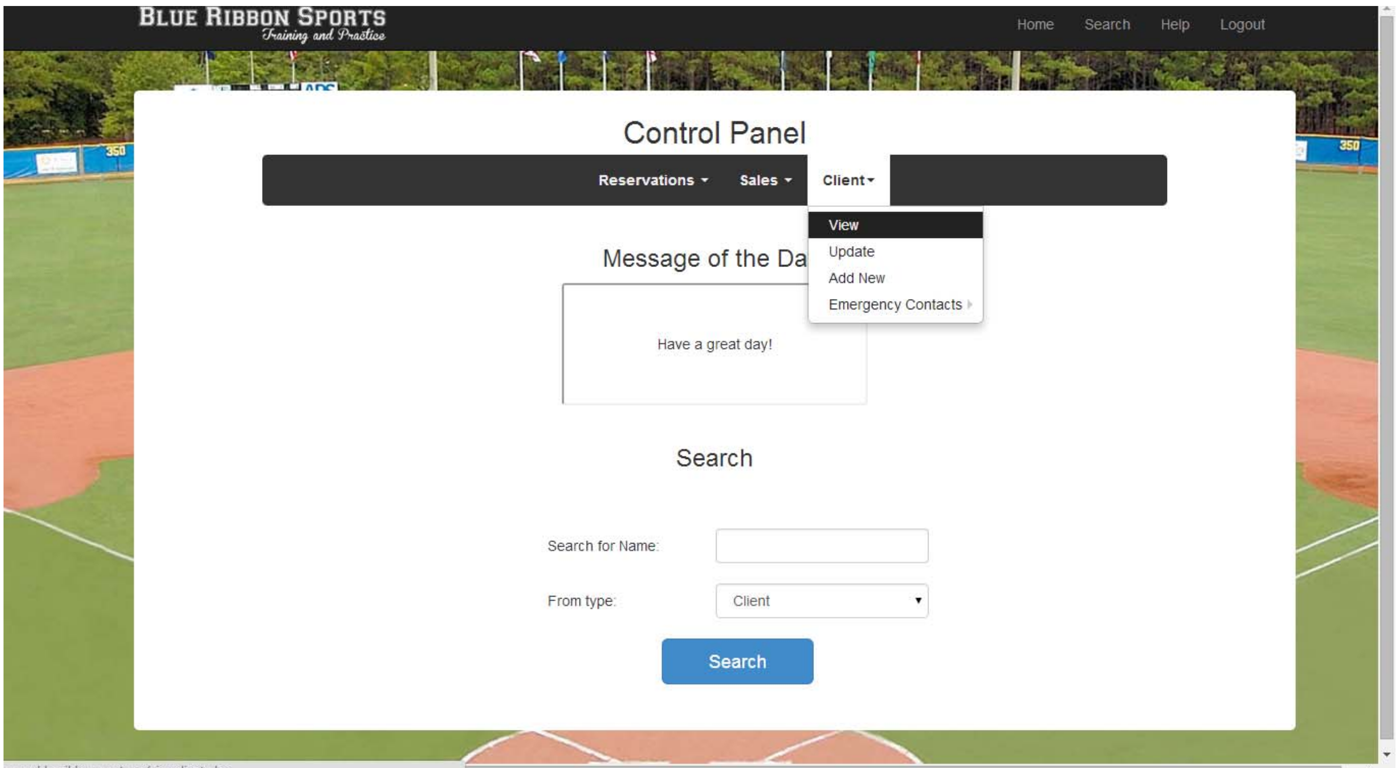
The Apply Payments screen allows for entry of a payment received for an Invoice, Special Order or In-Stock Sale into the system.



1. The next available Payment ID will be populated into the form. You must then enter either the Bill ID or Sale ID, Payment Method, Payment Amount, and if the method is Check or Credit Card Number, the Check Number or Receipt Number.
2. Once the payment information has been entered, click Apply Payment.
3. If any required fields are left blank, you will be prompted to enter them before the Apply Payment button will work.

User – Client Dropdown

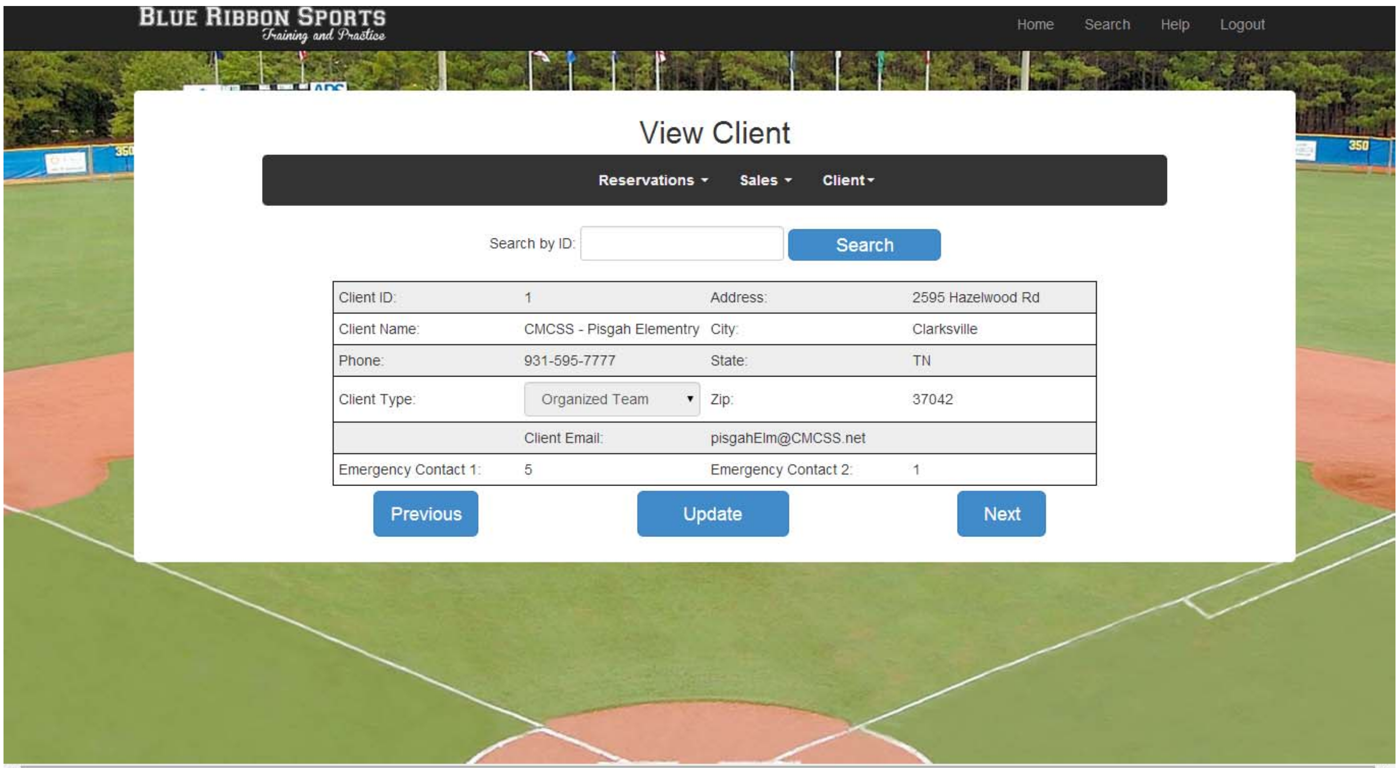
The Clients section of the navigation bar provides access to the Client functions contained within the system, such as managing clients and their emergency contacts, broken down into three links and one categories.



1. To access the Client dropdown, click on Client on the Navigation bar.
2. If a small gray triangle is listed to the right of the item in the dropdown, it contains further menu options. Hover over the category to see more options.
3. Click on the desired page to navigate to it.

View Client

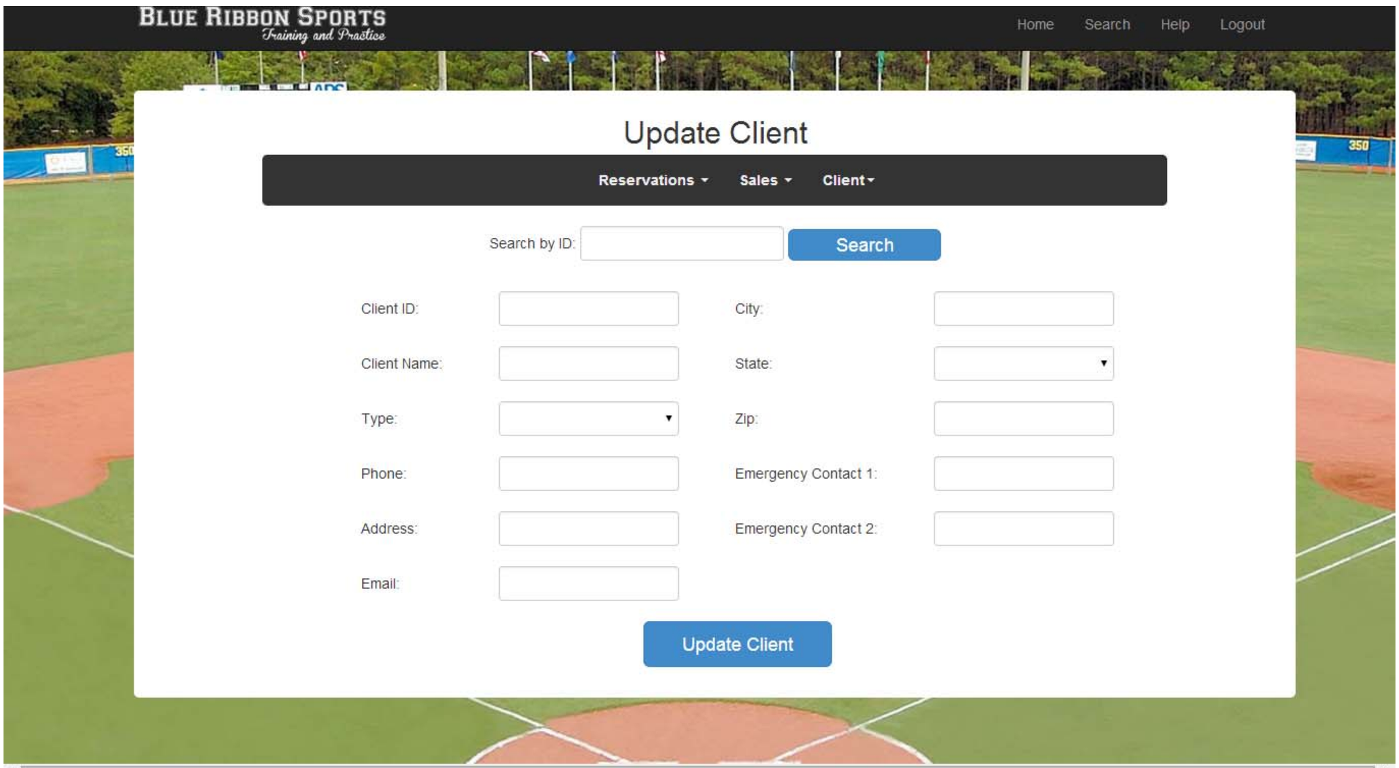
The View Client screen displays the Client ID, Client Type, Full Name, Full Address, Phone number, Email and Emergency Contact ID for the selected Client.



1. To view an existing client, enter their Client ID into the "Search by ID" field and click "Search." If you do not know the client's ID, you can click Next and Previous to navigate through clients, or use the Search (Page 21).
2. If information for the client being viewed needs to be updated, you can click on the "Update" button and you will be sent to the Update Client screen (Page 37) for this client.

Update Client

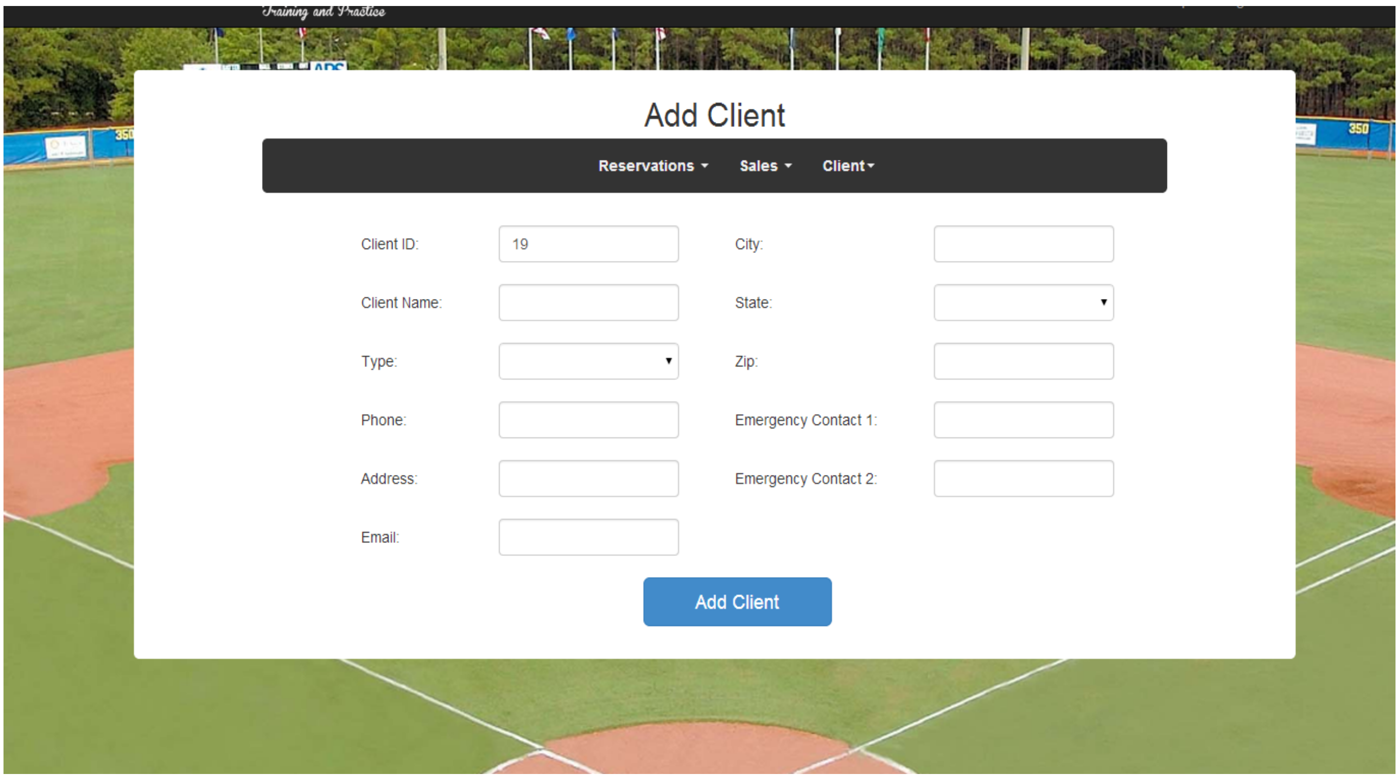
The Update Client screen displays the Client ID, Full Name, Full Address, Phone number, Email, Client Type, and Emergency Contact ID for the selected Client, in an editable format.



1. To update an existing client, enter their Client ID in the “Search by ID” field at the top and click “Search.”
2. The Client’s existing information will be loaded into the form.
3. Perform any required updates in the form, then click Update Client.
4. If any required fields are left blank, you will be prompted to enter them before the Update Client button will work.

Add Client

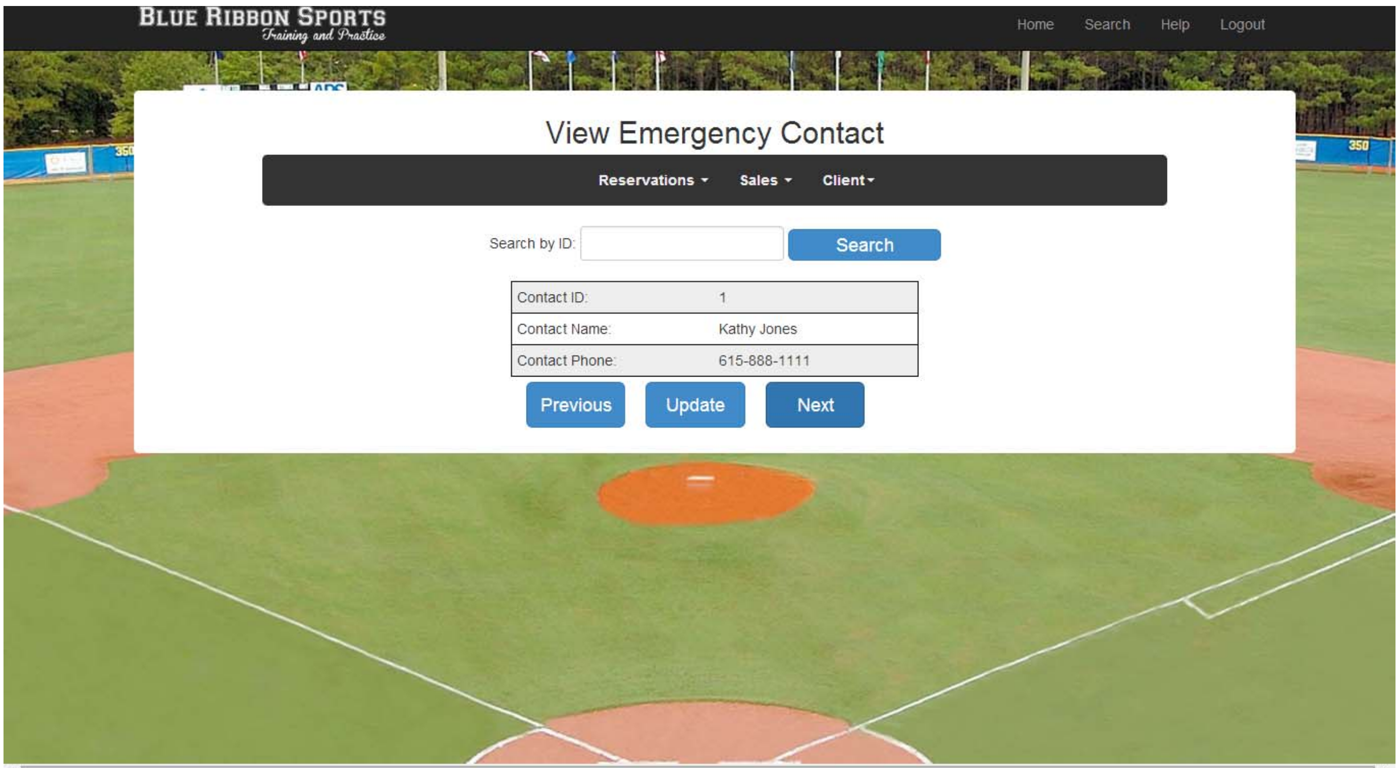
The Add Client screen allows for the entry of a new client into the system.



1. The next available Client ID will be automatically populated into the form. You must then enter the client name, type, phone, address, email, city, state, zip, and at least one emergency contact. The second emergency contact is optional.
2. Once complete, click the “Add Client” button to create the client.
3. If any required fields are left blank, you will be prompted to enter them before the Add Client button will work.

View Emergency Contact

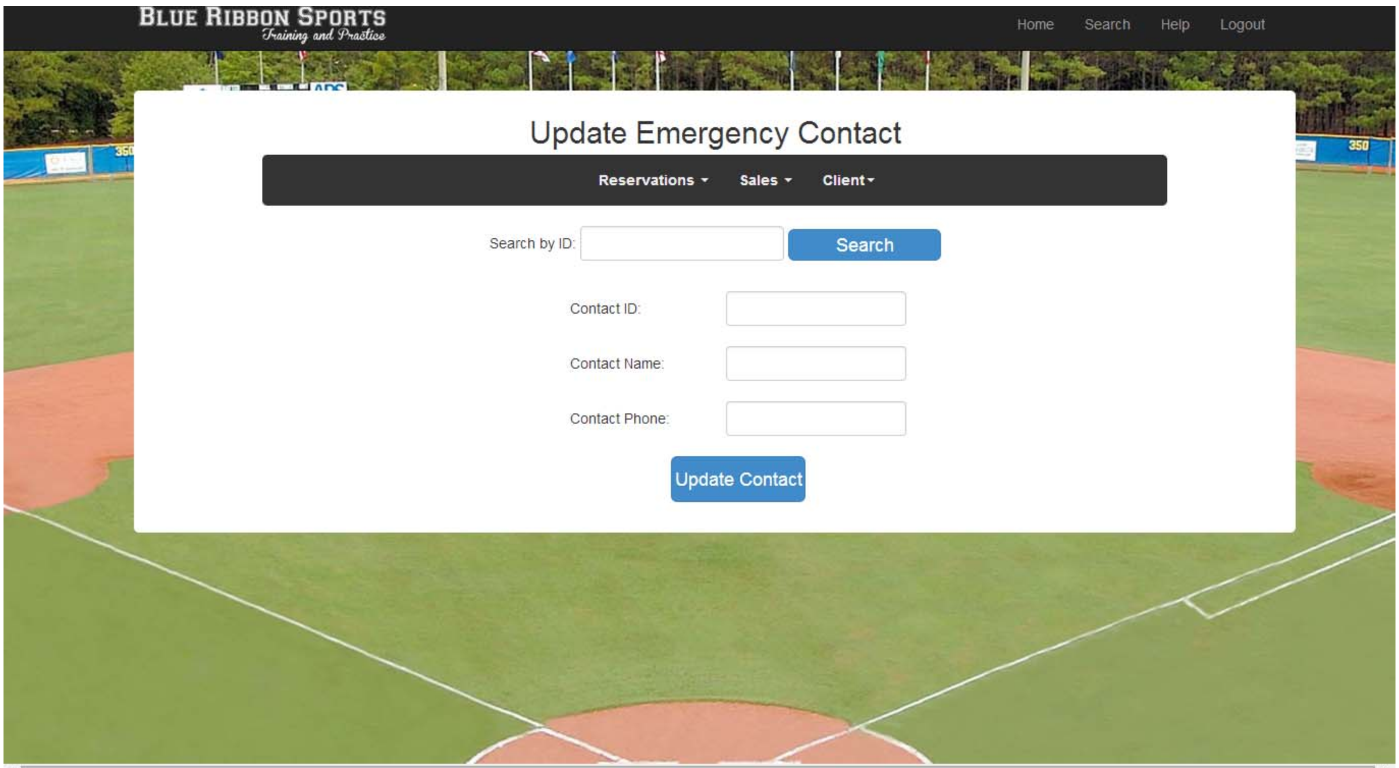
The View Emergency Contact screen displays the Emergency Contact ID, Full Name, and Phone for the selected emergency contact, in an editable format. From this screen you can navigate to update emergency contact if needed.



1. To view an existing emergency contact, enter their Contact ID into the “Search by ID” field and click “Search.” If you do not know the contact’s ID, you can click Next and Previous to navigate through contacts.
2. If information for the contact being viewed needs to be updated, you can click on the “Update” button and you will be sent to the Update Emergency Contact screen (Page 40) for this contact.

Update Emergency Contact

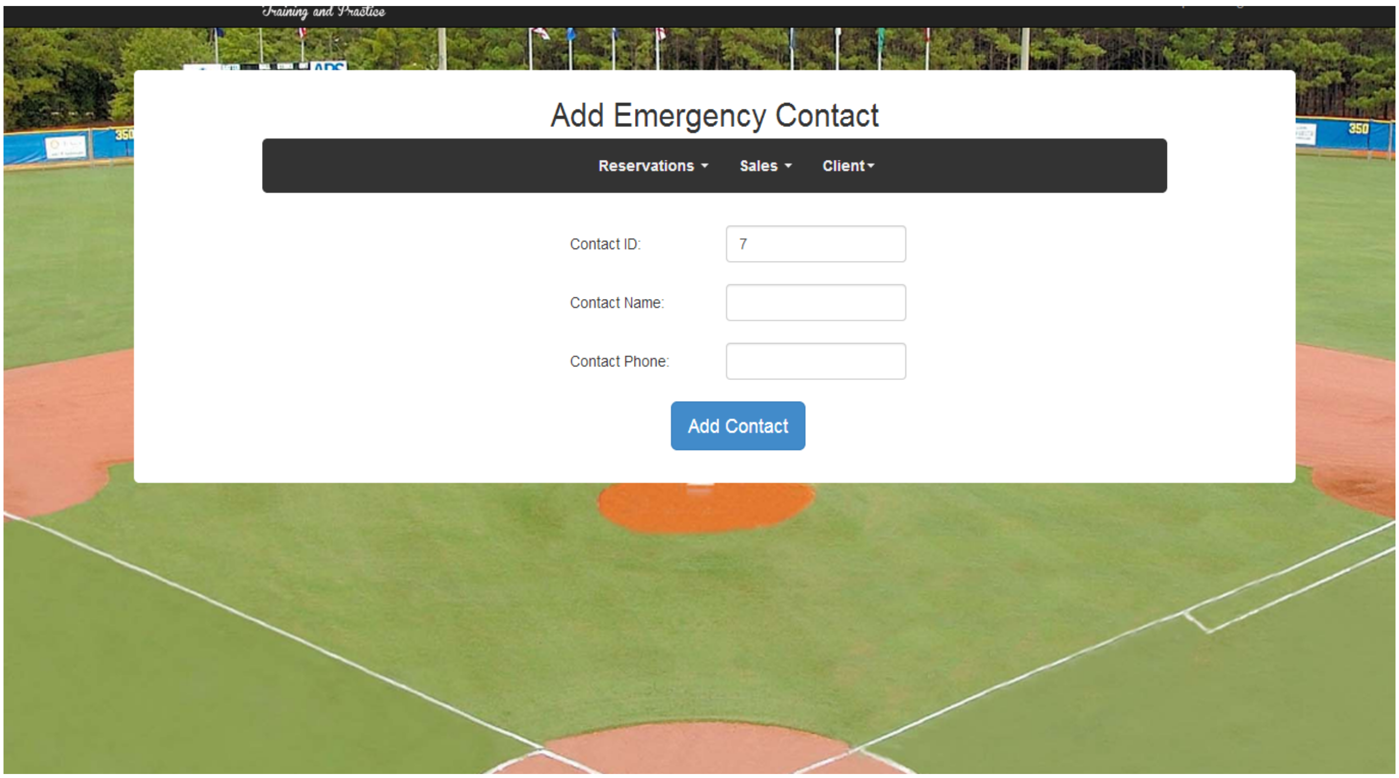
The Update Emergency Contact screen displays the Emergency Contact ID, Full Name, and Phone for the selected emergency contact, in an editable format.



1. To update an existing emergency contact, enter their Contact ID in the "Search by ID" field and click "Search."
2. The Contact's existing information will be loaded into the form.
3. Perform any required updates and then click "Update Contact."
4. If any required fields are left blank, you will be prompted to enter them before the "Update Contact" button will work.

Add Emergency Contact

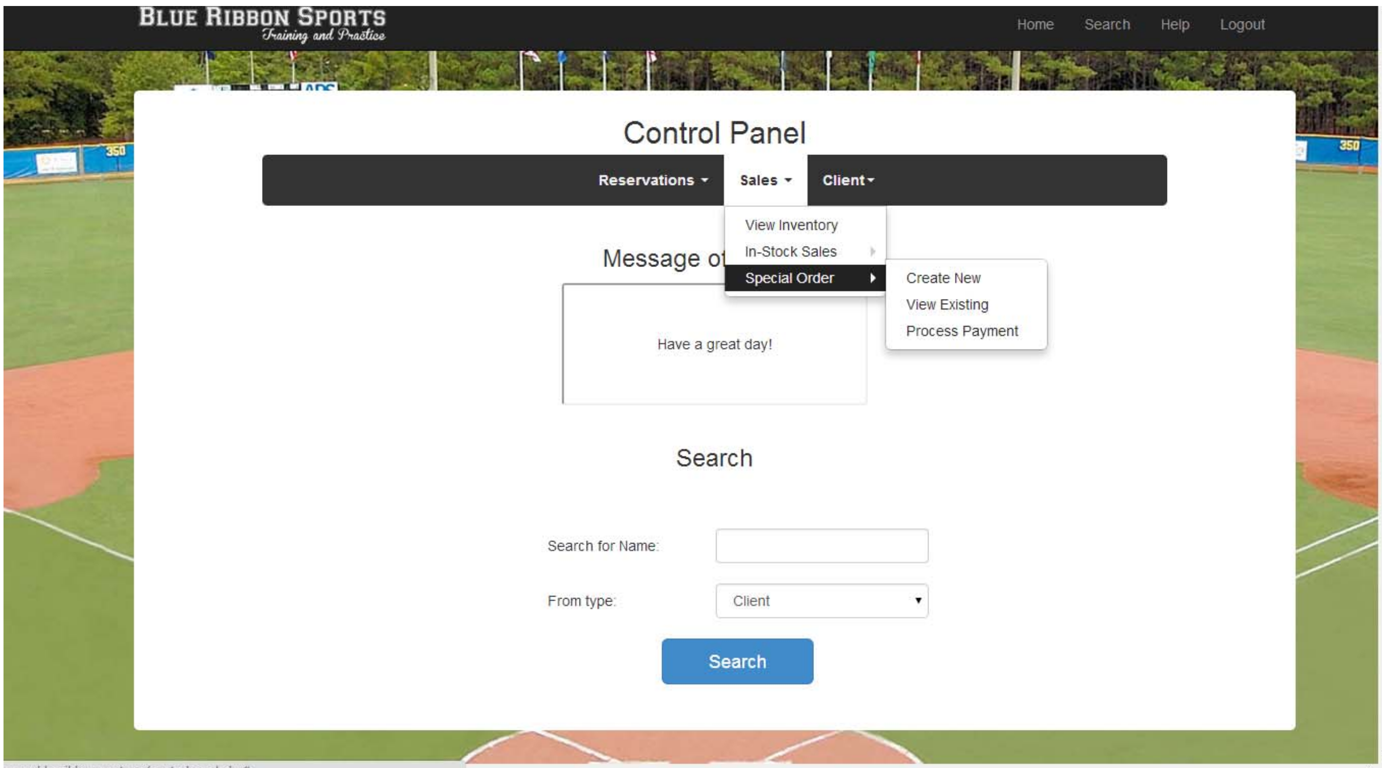
The Add New Emergency Contact screen allows for the entry of a new emergency contact into the system.



1. The next available Emergency Contact ID will be populated into the form. You must then enter the Client Name and Client Phone number.
2. Once complete, click the “Add Contact” button to create the Emergency Contact.
3. If any required fields are left blank, you will be prompted to enter them before the Add Contact button will work.

User – Sales Dropdown

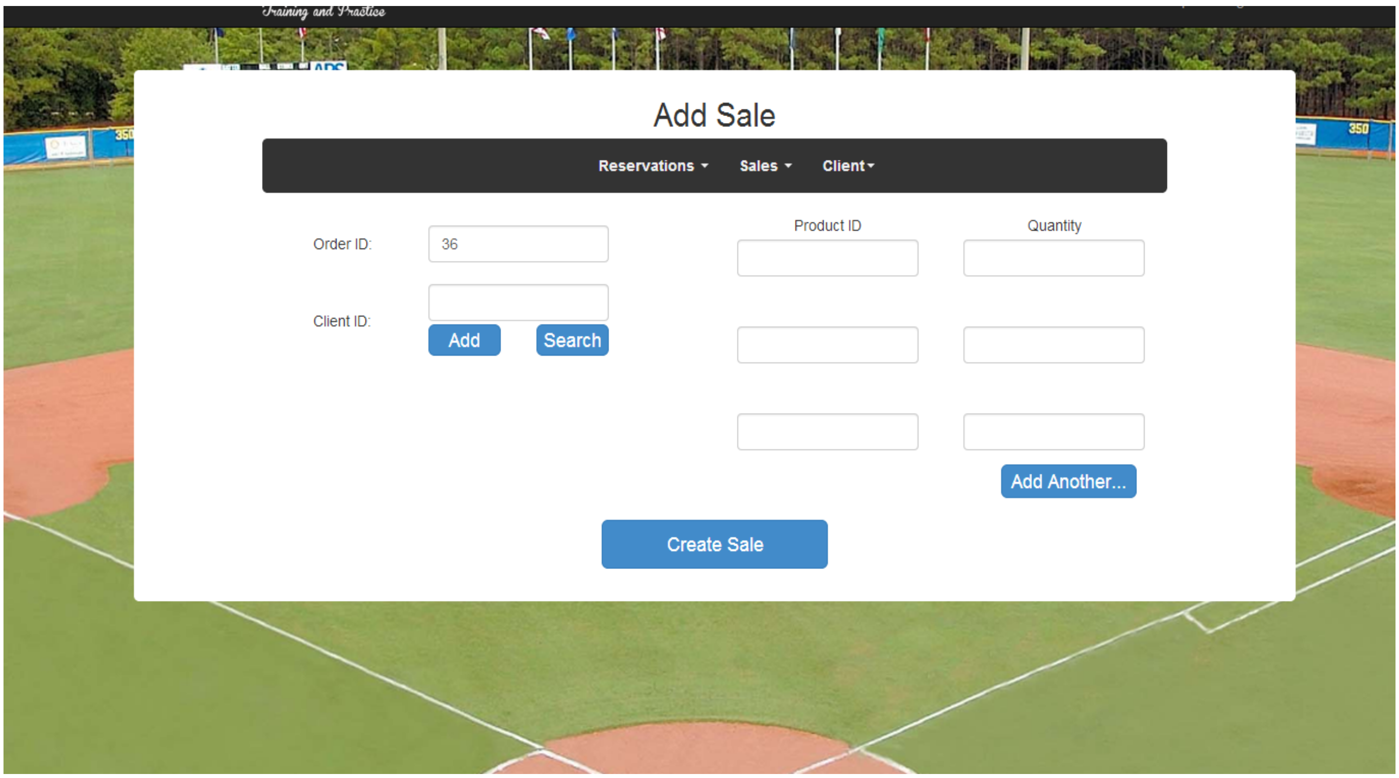
The Sales section of the navigation bar provides access to the sales functions contained within the system, such as creating sales and processing payments, broken down into one link and two categories.



1. To access the Sales dropdown, click on Sales on the Navigation bar.
2. If a small gray triangle is listed to the right of the item in the dropdown, it contains further menu options. Hover over the category to see more options.
3. Click on the desired page to navigate to it.

Add New Sale

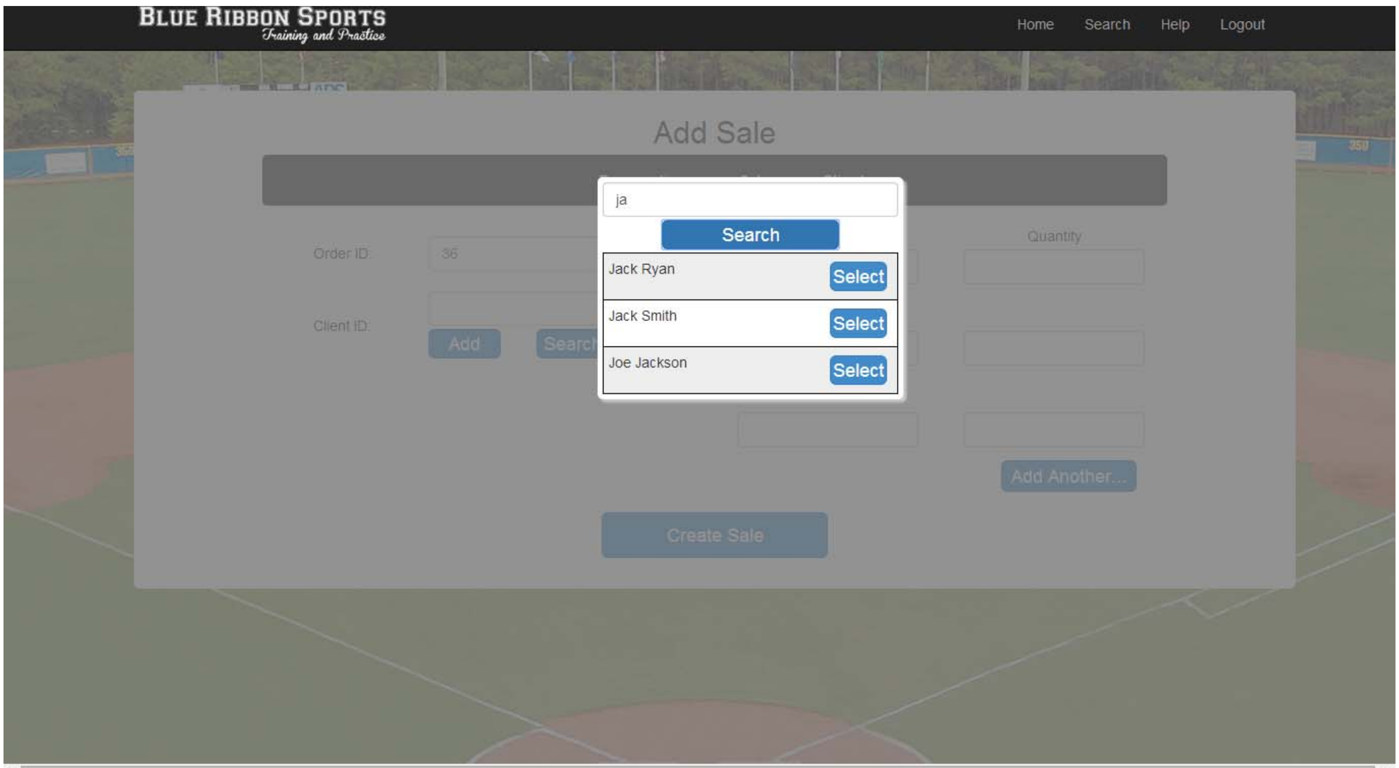
The Add New Sale screen allows for the entry of a new merchandise sale into the system.



1. The next available Order ID will be populated into the form. You must then enter a Client ID and at least one Product ID and Quantity to be sold. The Product Name will be displayed below the Product ID once entered.
2. If the Client ID for the sale does not yet exist, click the "Add" button to be sent to the Add Client screen (See Page 38). If the user does not know their ID, click the Search button (See Page 44)
3. To add more than 3 items to a sale, click the "Add Another" button to add more text fields for Product ID and Quantity entry.
4. Once complete, click "Create Sale" to create the sale.
5. If any required field is left blank, you will be prompted before you the Create Sale button will function.

Add New Sale Client Search

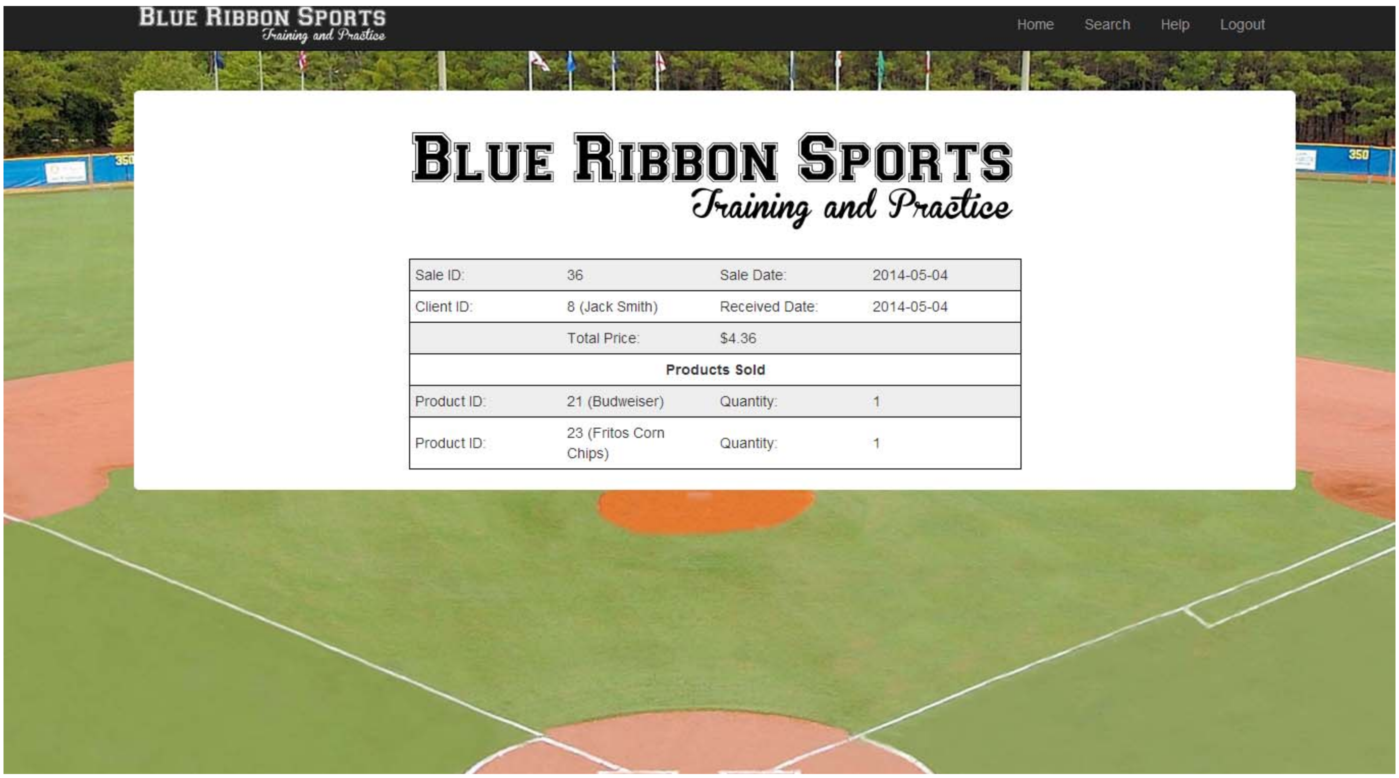
The Add New Sale Client Search allows for searching for an existing Client ID when creating a new sale.



1. After clicking the Search button, a search field and button will appear.
2. Type in the name of the desired client and click Search.
3. A list of matching clients will be displayed. To enter the matching ID for the desired client, click the Select button next to that client's name.

Sale Receipt

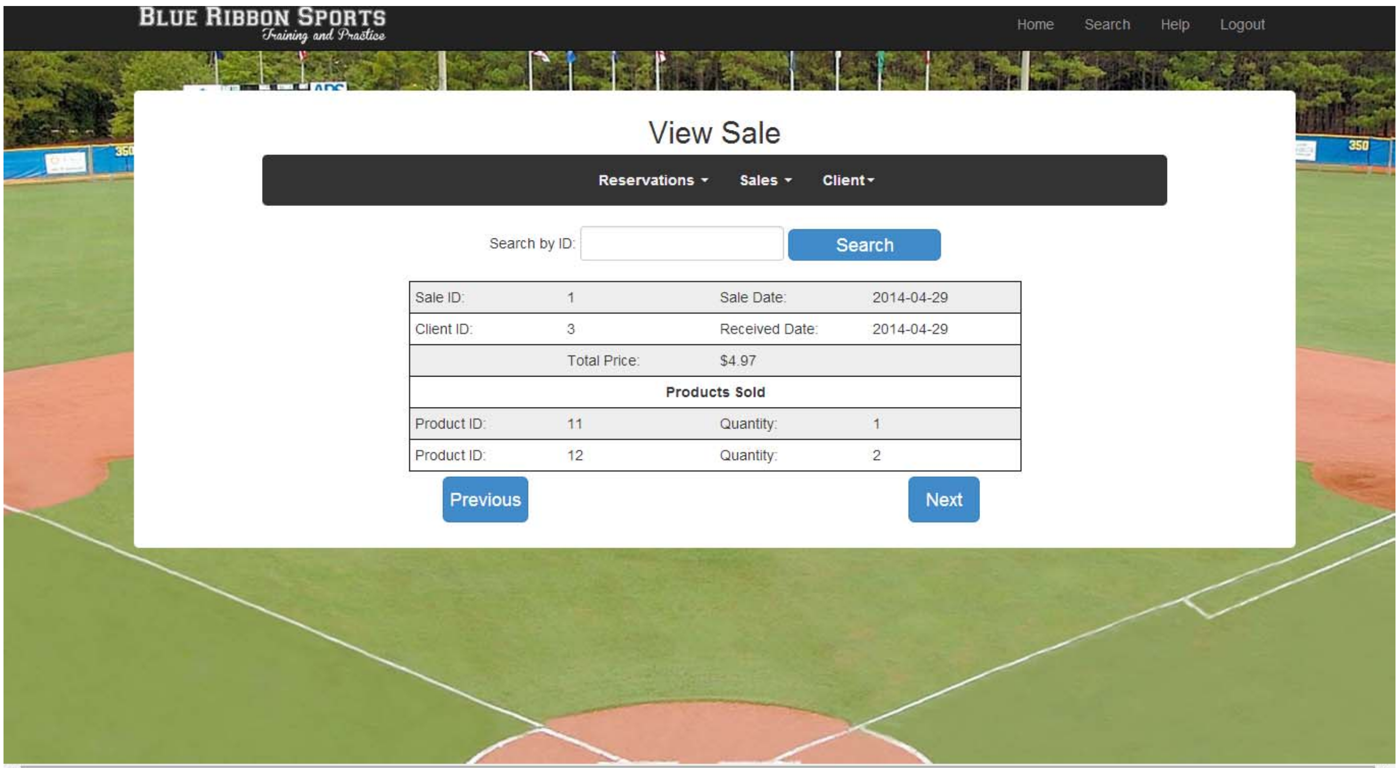
The Sale Receipt screen is displayed after an In-Stock or Special Order has been completed.



1. To print the sales receipt, use the browser's Print functionality.
2. To return to a screen with a navigation menu, click on "Home" or the Blue Ribbon logo in the top navigation bar.

View Sale

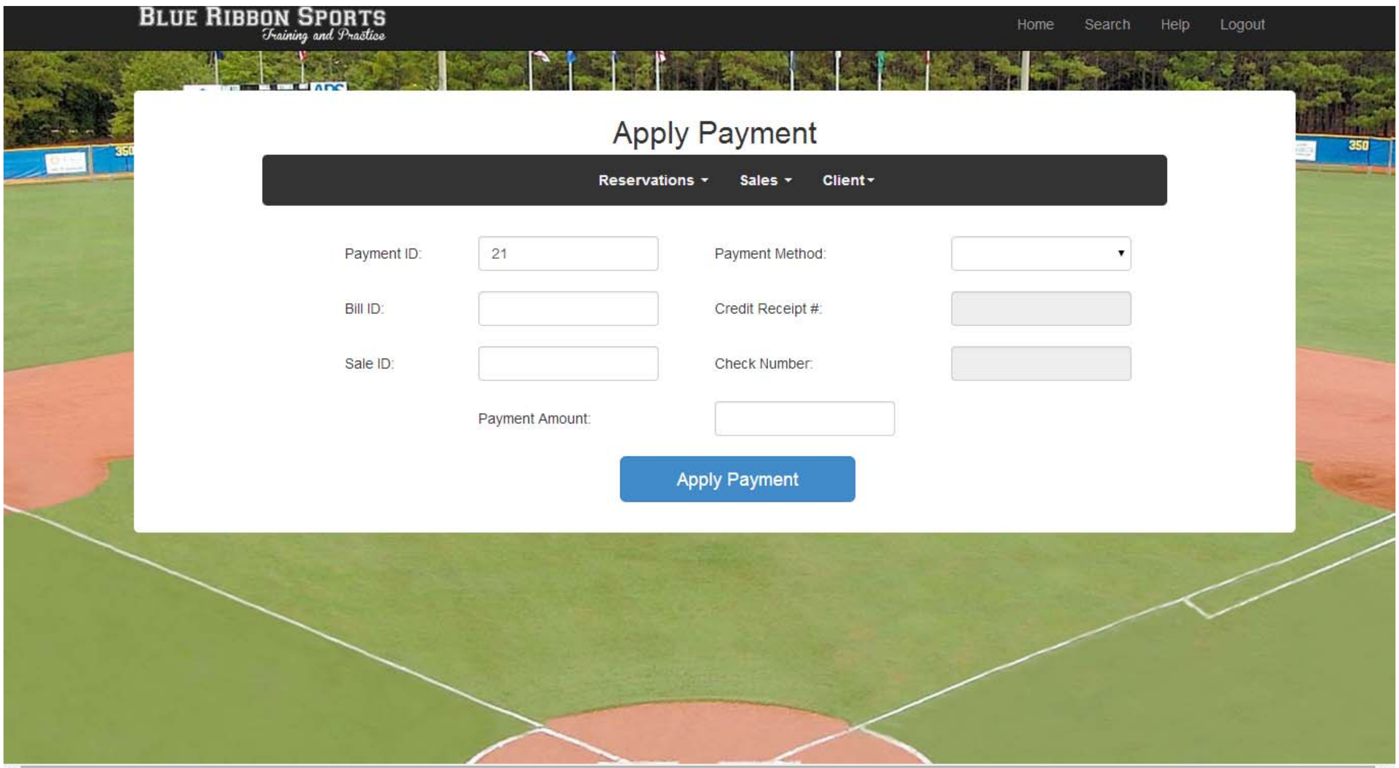
The View Sale screen displays the details associated with the selected sale.



1. To search for a specific sale, enter the Sale ID in the Search by ID field and click Search. To browse forward and backward through sales, click on the Next and Previous buttons.
2. For Special Orders, if the sale does not have a Sale Fulfilled date, the Mark Fulfilled button will be displayed.
3. If the sale has been fulfilled, click on Mark Fulfilled to enter the Sale Fulfilled date for this order.

Apply Payment

The Apply Payments screen allows for entry of a payment received for an Invoice, Special Order or In-Stock Sale into the system.



1. The next available Payment ID will be populated into the form. You must then enter either the Bill ID or Sale ID, Payment Method, Payment Amount, and if the method is Check or Credit Card Number, the Check Number or Receipt Number.
2. Once the payment information has been entered, click Apply Payment.
3. If any required fields are left blank, you will be prompted to enter them before the Apply Payment button will work.

BLUE RIBBON SPORTS

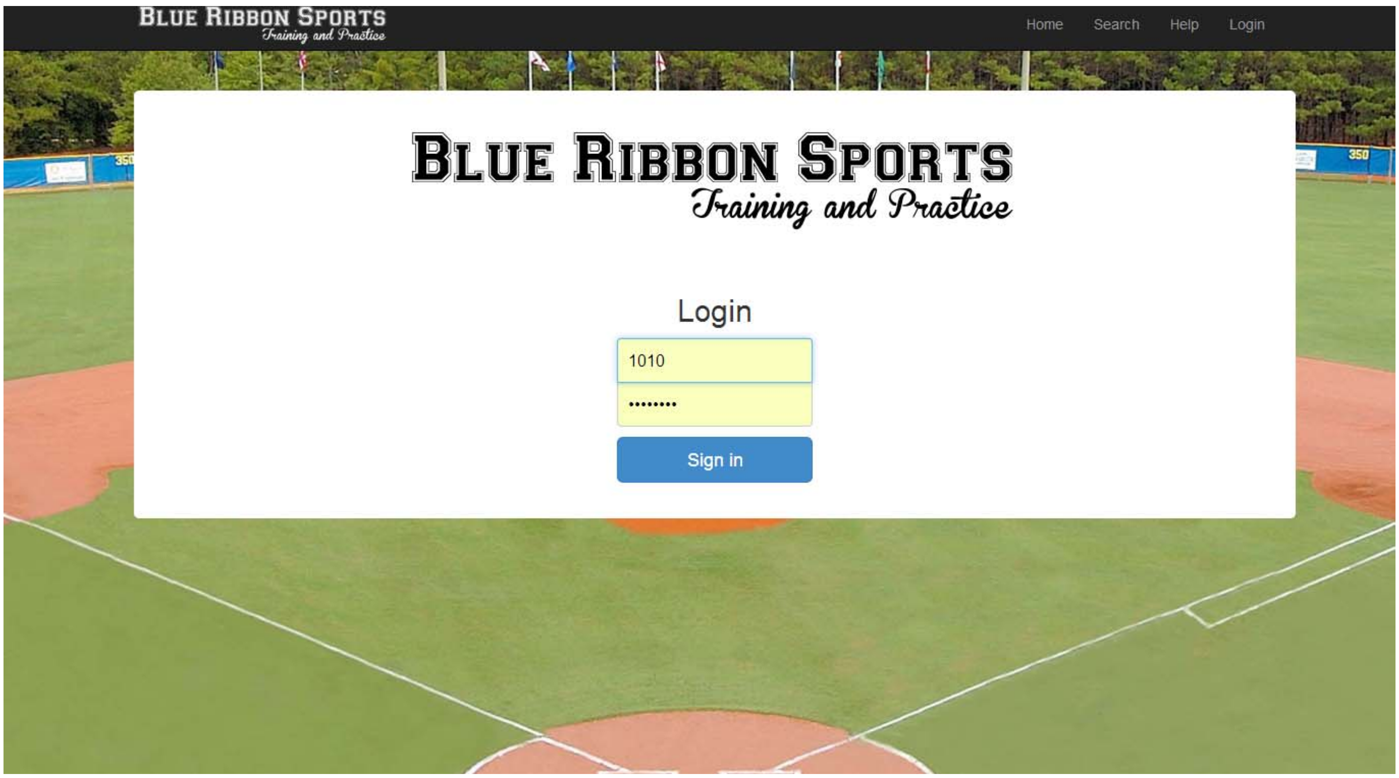
Training and Practice

System User Manual

Manager Access Session

Login

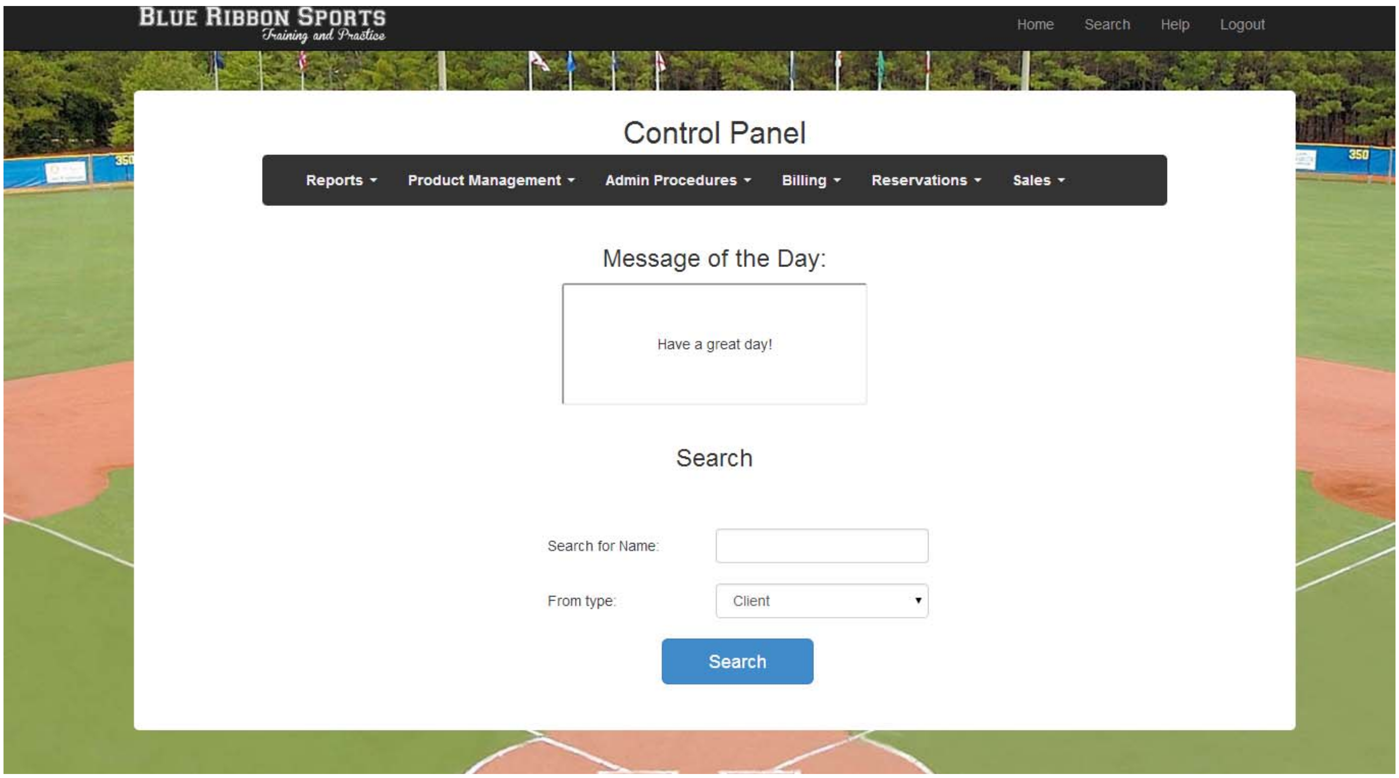
The Log In screen allows for entry into the system. The access type associated with the login ID will determine the authorized level of access. (I.E. Manager or Employee)



1. Enter your Employee ID and Password into the Employee ID and Password fields.
2. Click "Sign in."
3. If your Employee ID and Password are correct, the Control Panel for your user will be shown. If your Employee ID or Password are incorrect, you will be shown an error and asked to re-enter the information.
4. If your Employee ID has been terminated, you will be informed and must contact a manager.

Control Panel

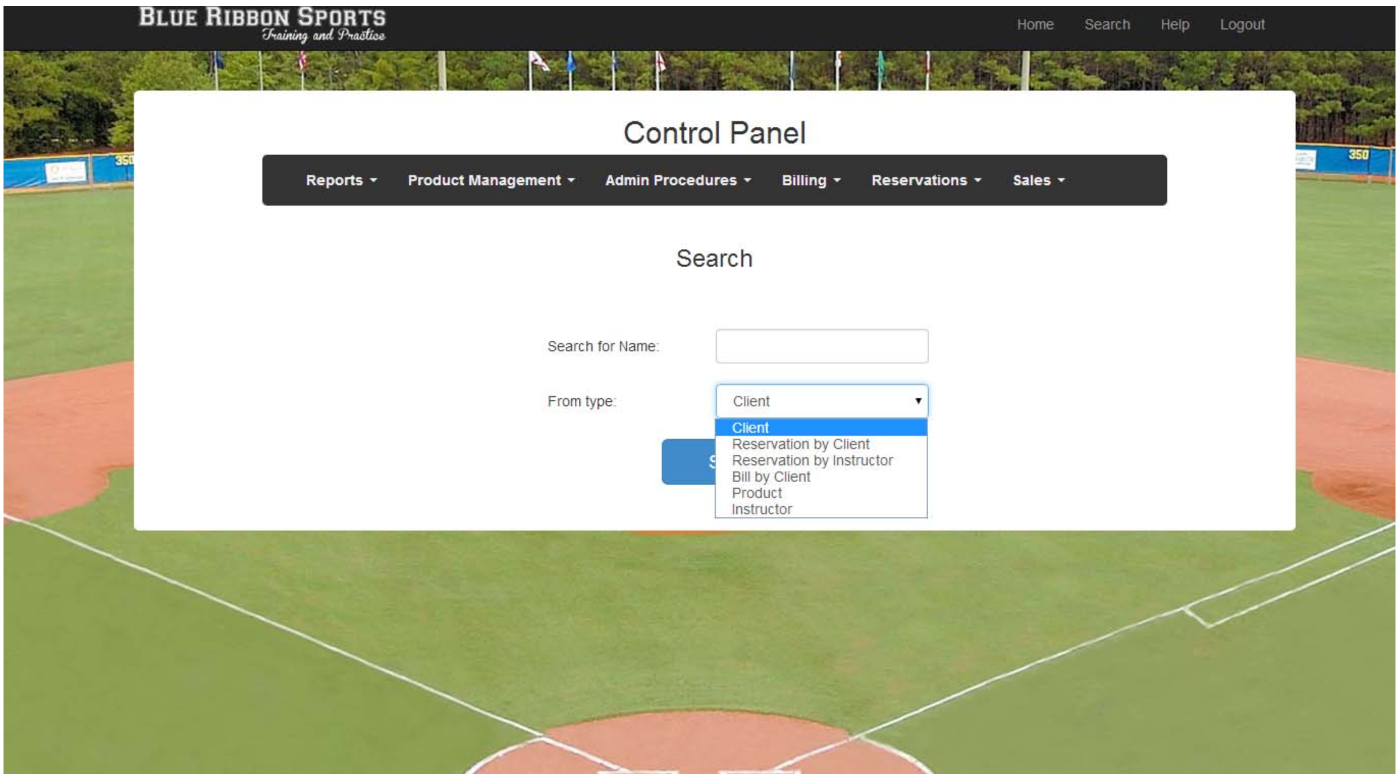
The Control Panel is the screen displayed after a successful login to the system. From this screen the user can navigate to all the part of the systems they have access to.



1. When logged in, the Home page will be the Control Panel. The System Message of the Day will be displayed, as well as a Search (Page 50).
2. In order to use the search, enter a search term in the Search for Name field, and select the type of item being searched for from the dropdown menu. Click Search to be sent to the Search Results page (Pages 51-56).
3. In order to perform a system operation, use the navigation bar to select the desired operation.

Manager - Search

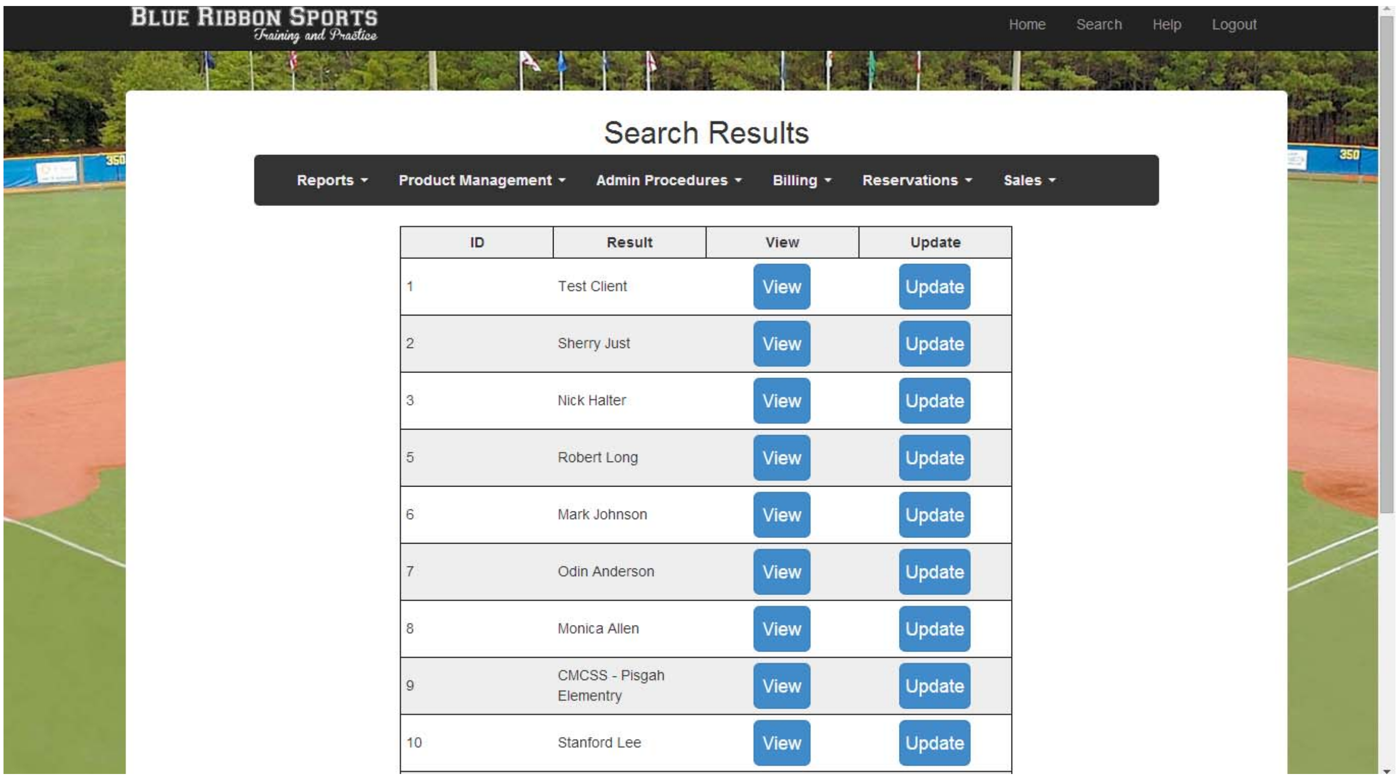
The Manager Search screen allows for searching by name for Client, Reservation by Client, Reservation by Instructor, Bill by Client, Product or Inventory



1. Depending on the type of search you wish to perform, select an option from the “From type:” dropdown, such as searching for a particular Client or Product.
2. Type the name of the desired client, instructor, product, or other record you wish to find, and click the “Search” button to be directed to the appropriate Search results page.

Search Bill by Client

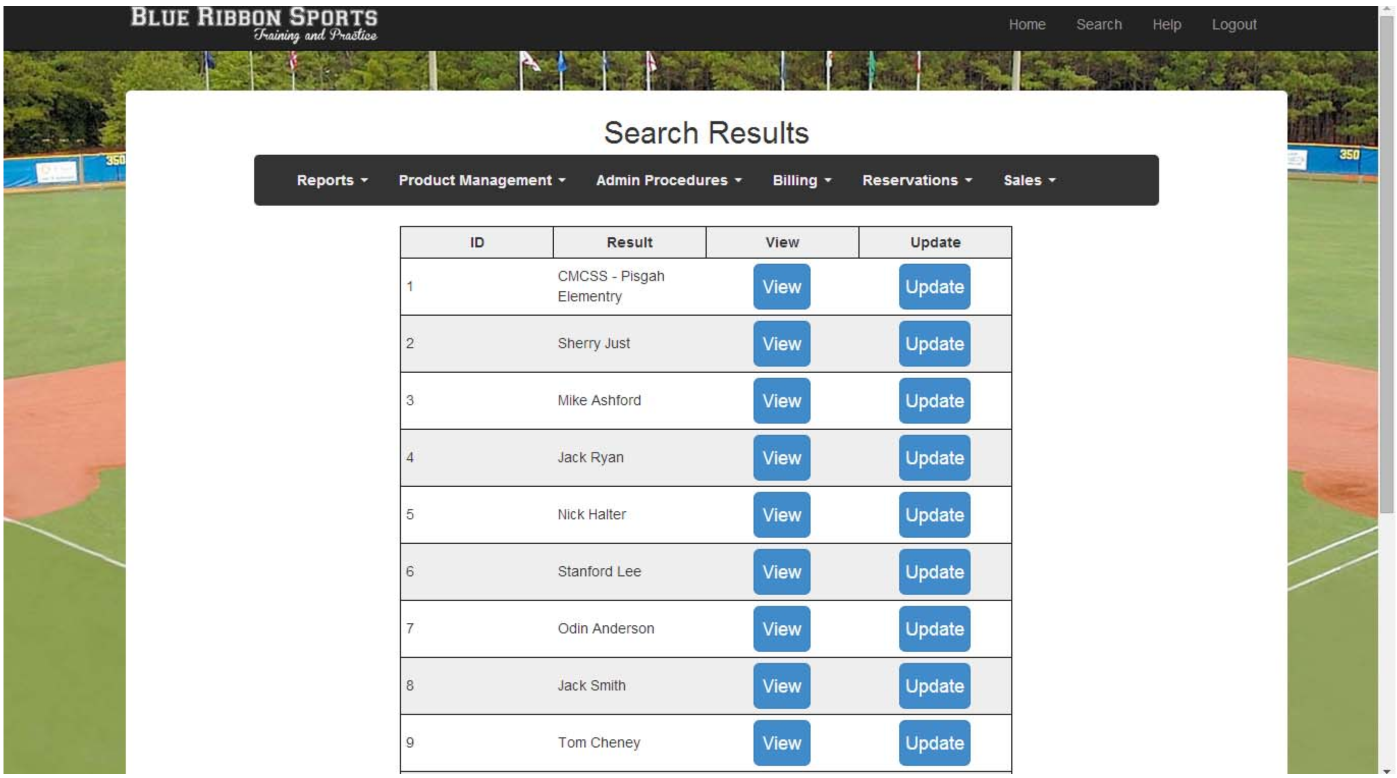
The Search Bill by Client allows for Locating a bill (invoice) by Client name.



1. The list of clients best matching the search string provided will be displayed in table format.
2. For each available client and invoice, a View and Update button are provided, allowing you to View more information about the bill, or update the details of it.

Search Client

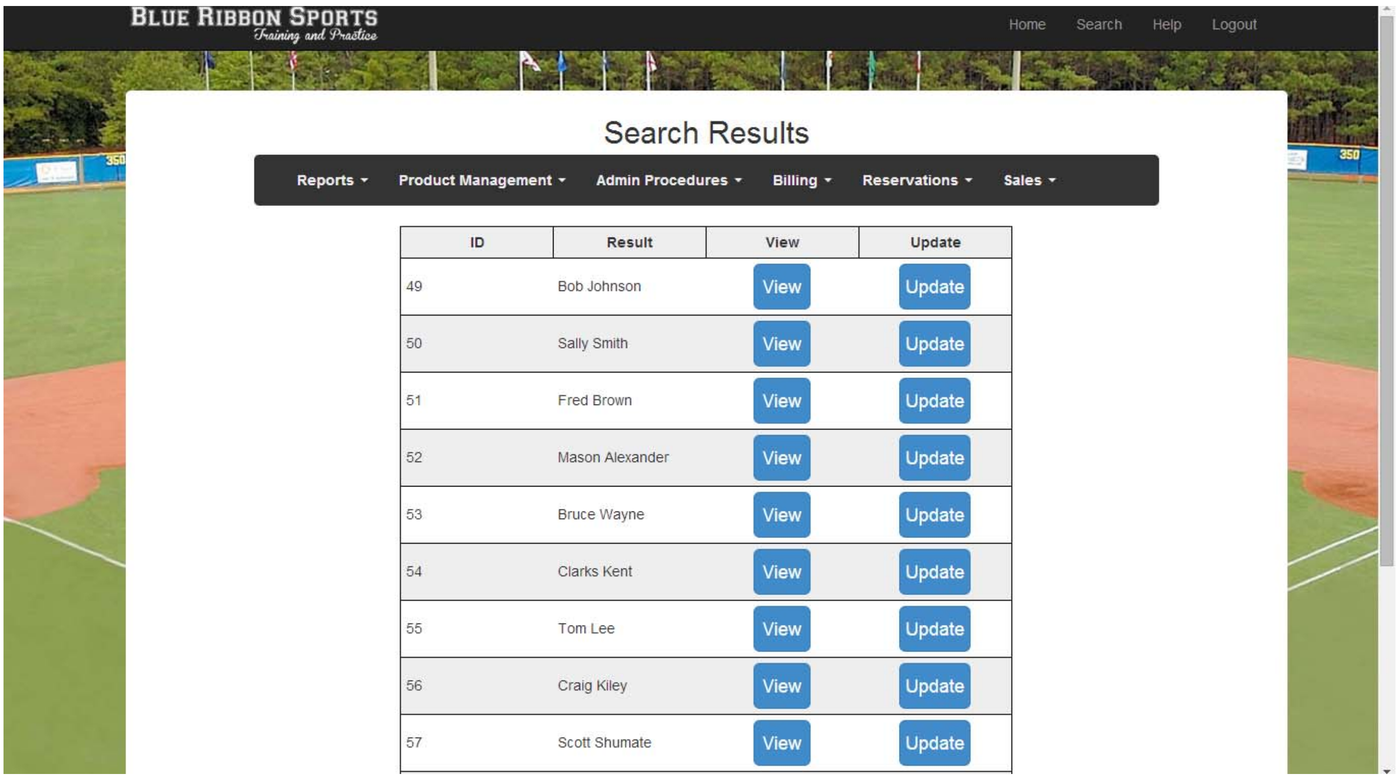
The Search Client screen allows for finding a Client Id by searching by the clients name.



1. The list of clients best matching the search string provided will be displayed in table format.
2. For each available client, a View and Update button are provided, allowing you to View more information about the client (Page 99), or update the details of it (Page 100).

Search Instructor

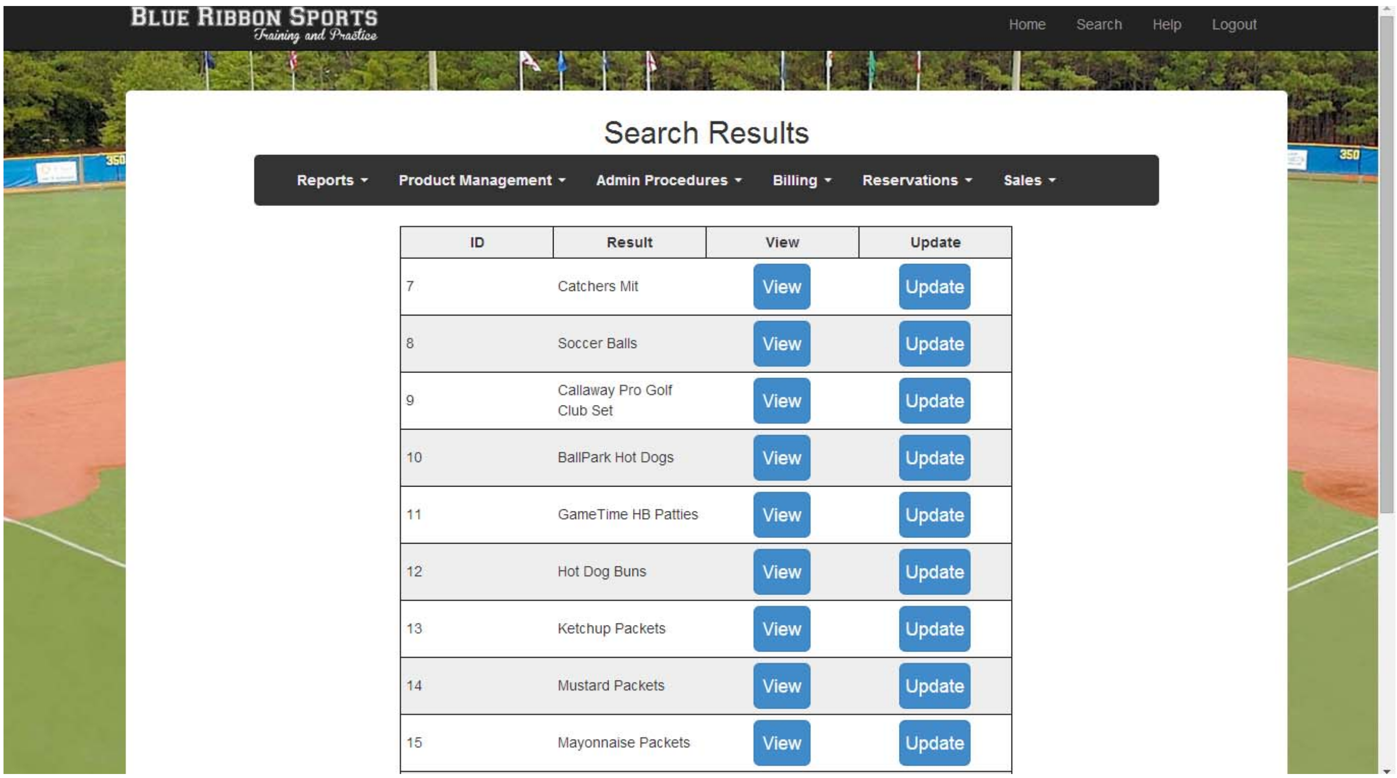
The Search Instructor screen allows for finding an Instructor Id by searching by the instructors name.



1. The list of instructors best matching the search string provided will be displayed in table format.
2. For each available instructor, a View and Update button are provided, allowing you to View more information about the instructor (Page 91), or update the details of it (Page 93).

Search Product

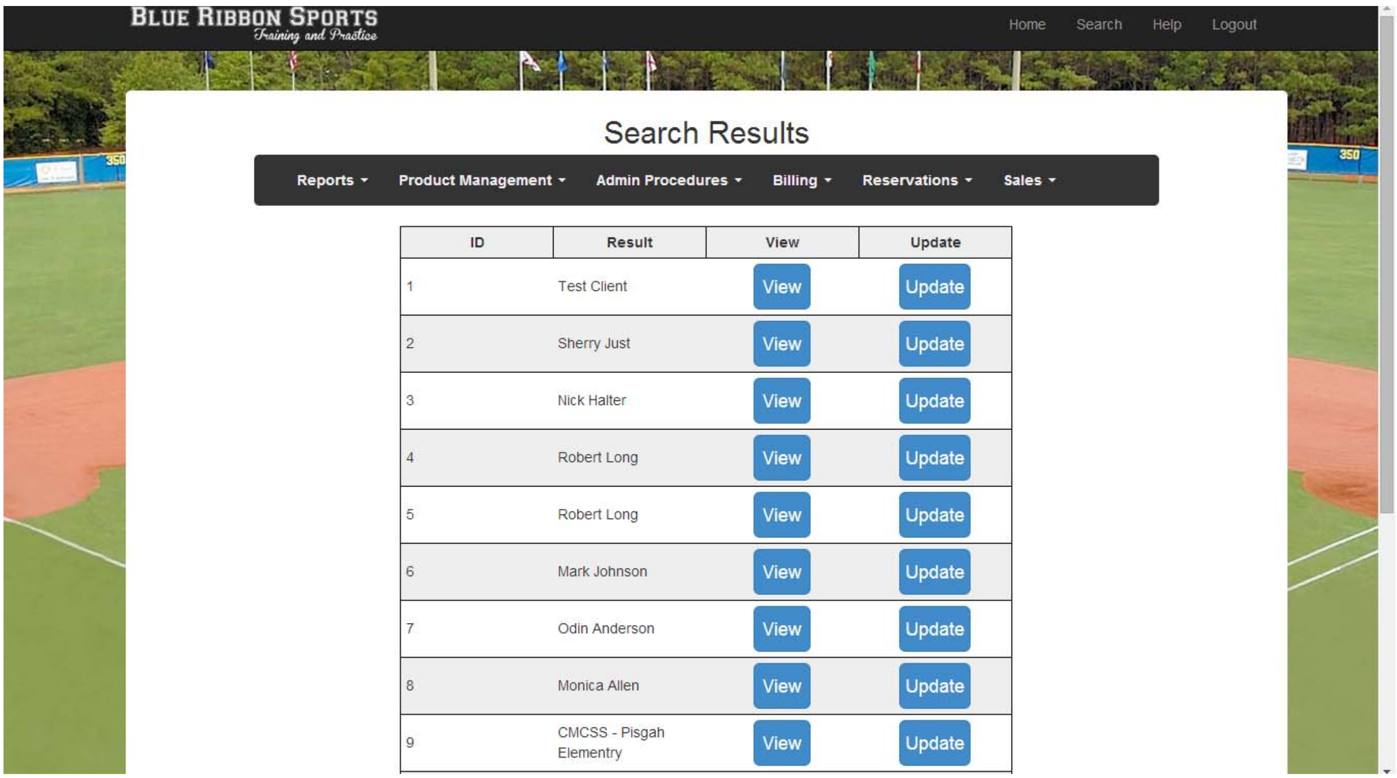
The Search Products screen allows for locating a Product Id by searching by the product name.



1. The list of products best matching the search string provided will be displayed in table format.
2. For each available product, a View and Update button are provided, allowing you to View more information about the product, or update the details of it.

Search Reservation by Client

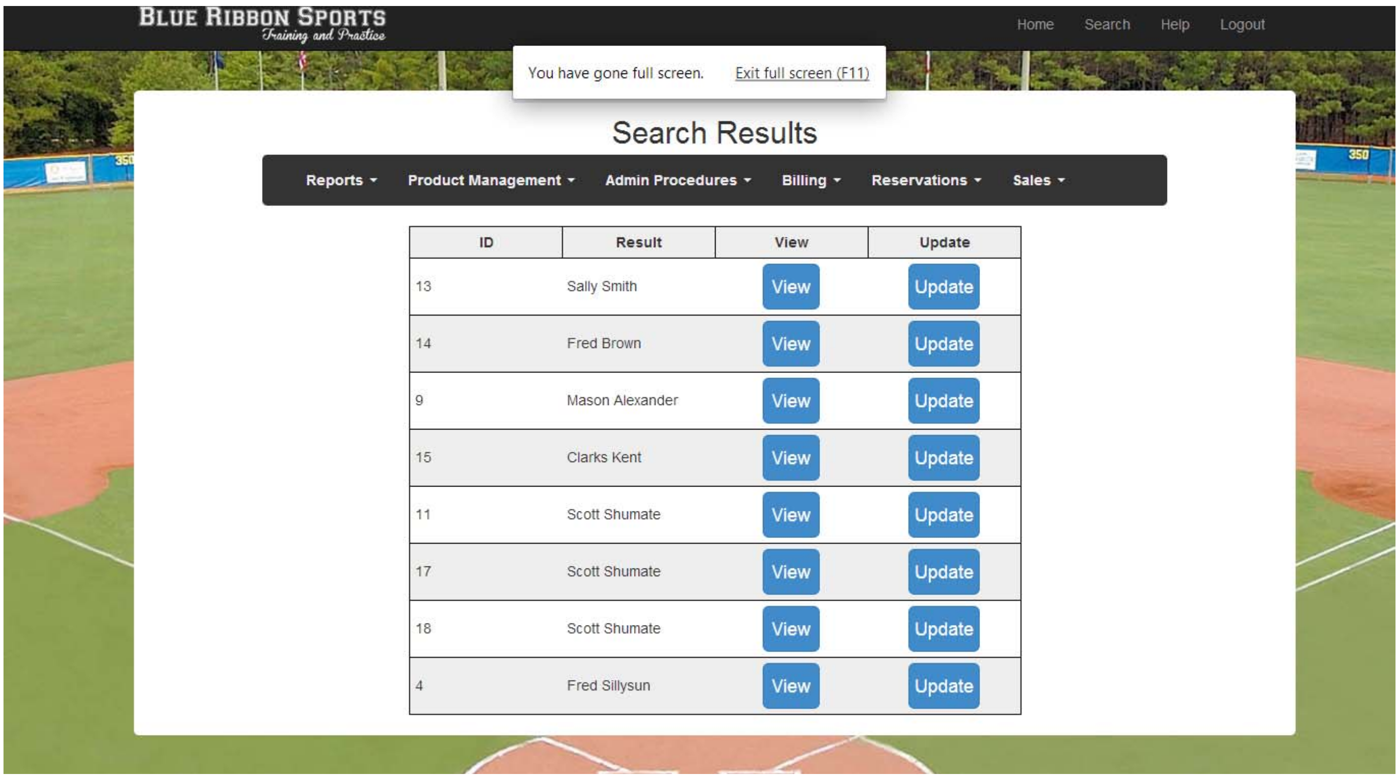
The Search Reservation by Client allows for locating a reservation id by searching by client name.



1. The list of clients best matching the search string provided will be displayed in table format.
2. For each available client and reservation, a View and Update button are provided, allowing you to View more information about the reservation (Page 146), or update the details of it (Page 147).

Search Reservation by Instructor

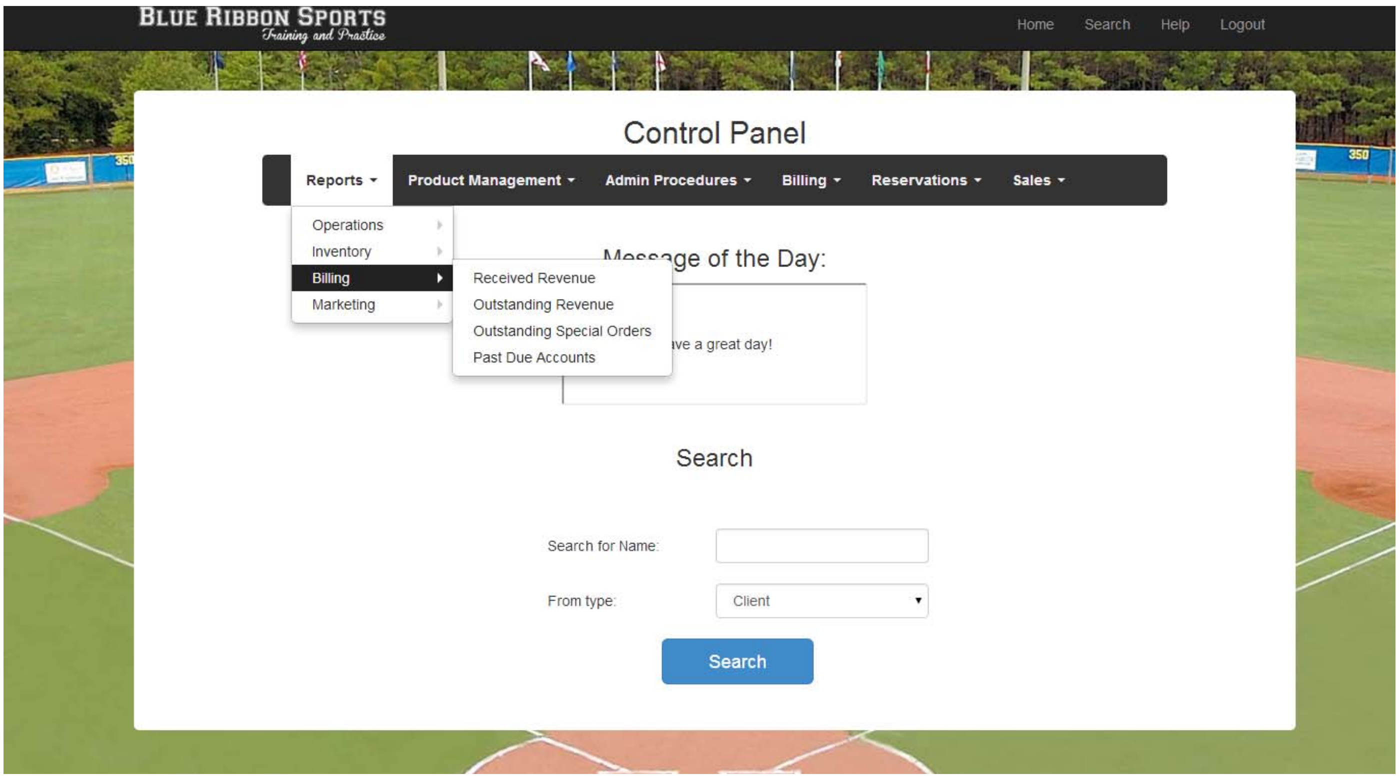
The Search Reservation by Instructor allows for locating a reservation id by searching by instructor name.



1. The list of instructors best matching the search string provided will be displayed in table format.
2. For each available instructor and reservation, a View and Update button are provided, allowing you to View more information about the reservation (Page 146), or update the details of it (Page 147).

Navigation – Reports

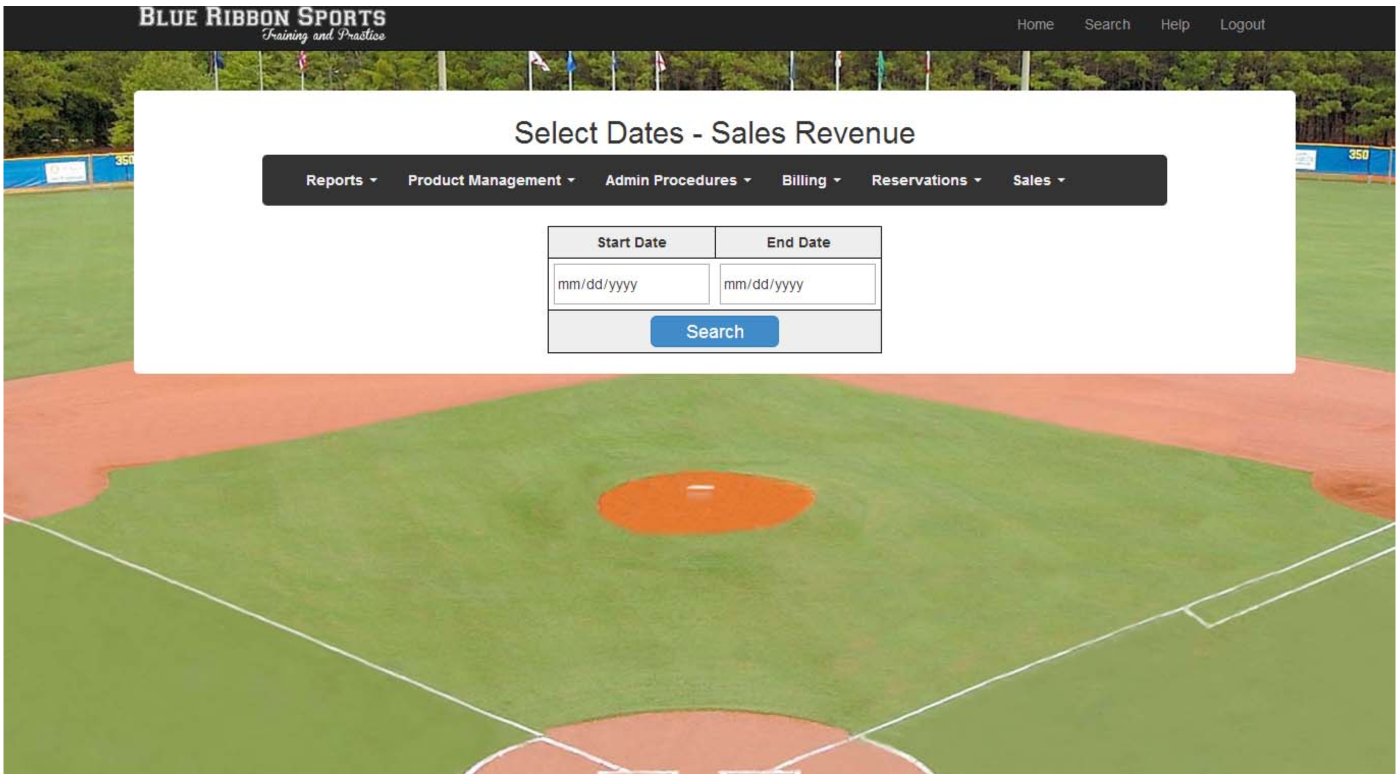
The Reports section of the navigation bar provides access to the reports provided by the system, separated into four categories.



1. To access the Reports dropdown, click on Reports on the Navigation bar.
2. If a small gray triangle is listed to the right of the item in the dropdown, it contains further menu options. Hover over the category to see more options.
3. Click on the desired page to navigate to it.

Sales Revenue Report

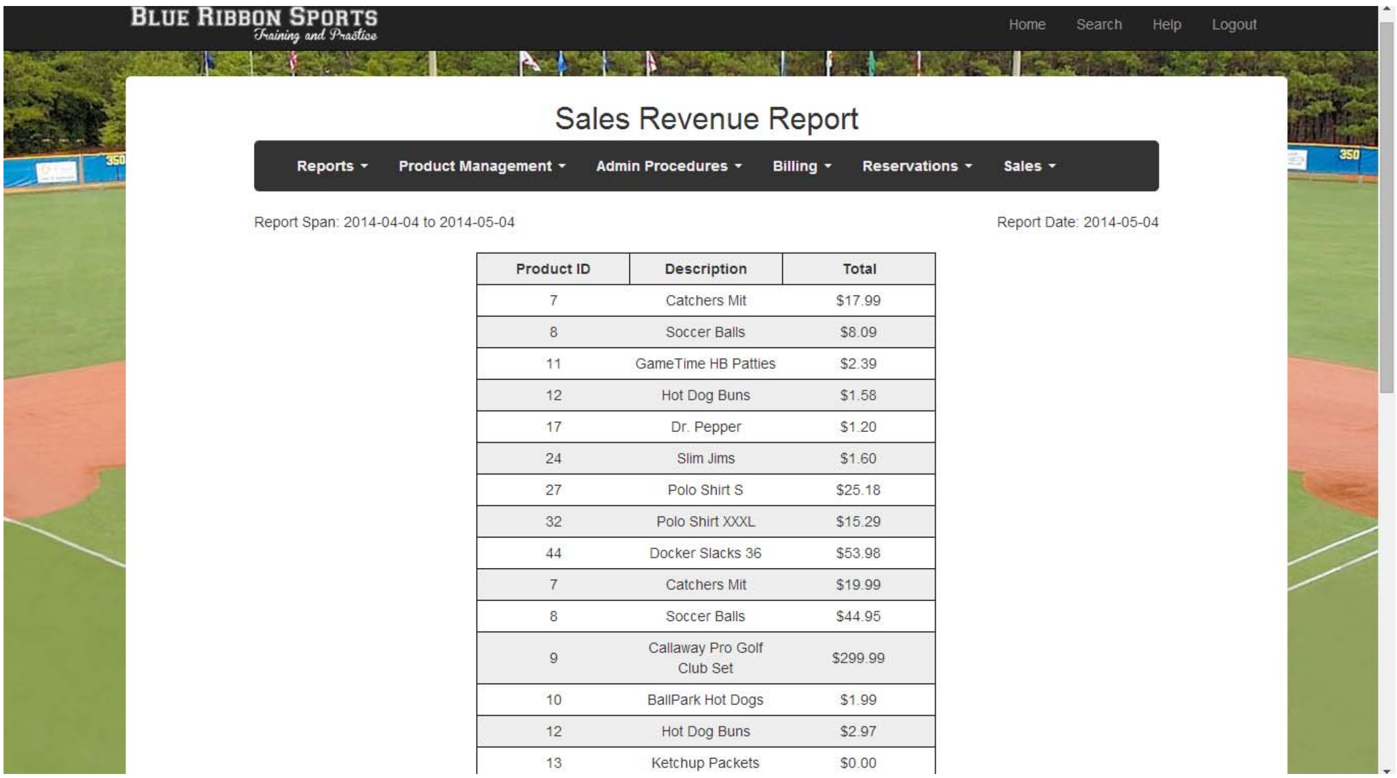
In order to View the Sales Revenue Report Report a date range must be entered to select the reservations.



1. Enter the Start Date and End date into the fields. In Chrome, a Date field will be displayed to simplify entry. In other browsers, dates should be entered in yyyy-mm-dd format.
2. Once the dates have been entered, click “Search” to generate the report.

Sales Revenue Report

The sales revenue report displays each product Id, description and total dollar amount in revenue for that specific product received during the specified date range. A grand total of all product revenue for that period is located at the bottom of the page.



Sales Revenue Report

Report Span: 2014-04-04 to 2014-05-04

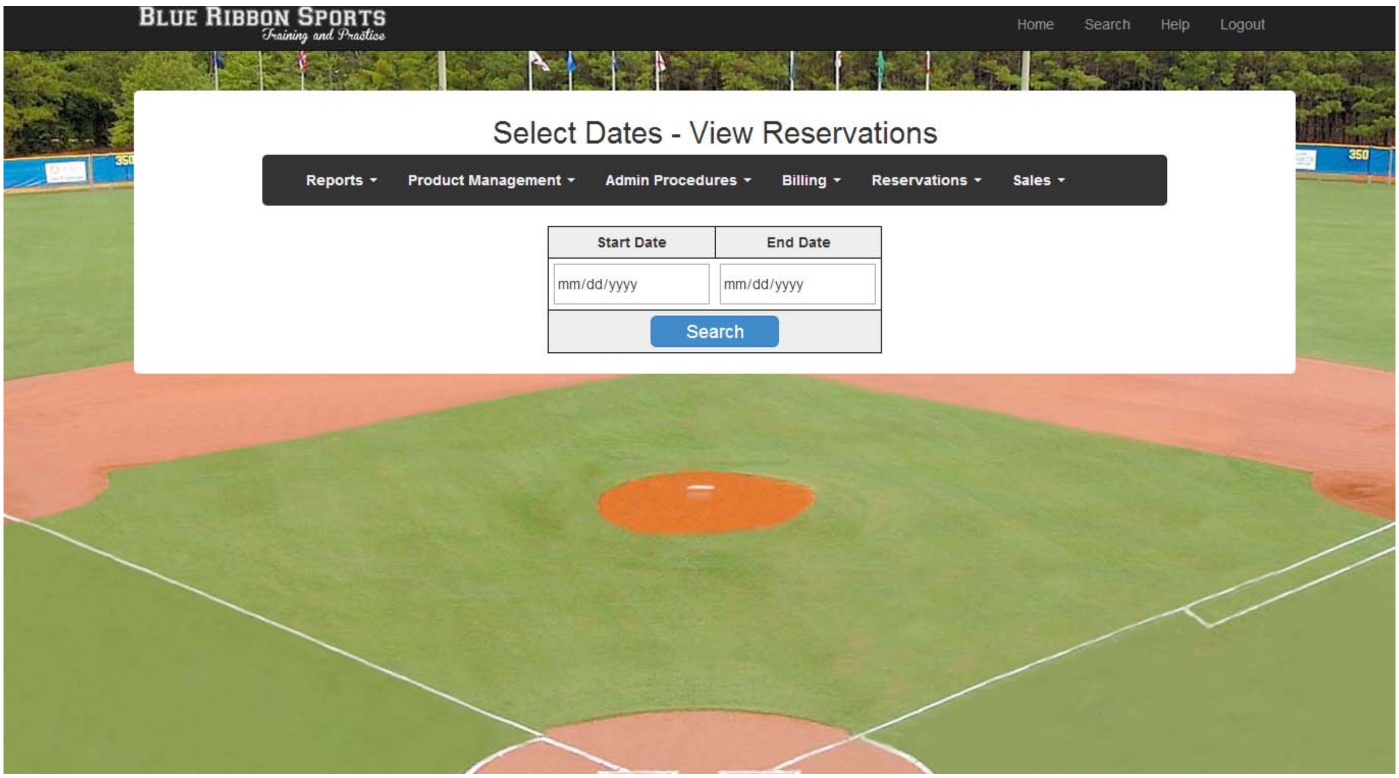
Report Date: 2014-05-04

Product ID	Description	Total
7	Catchers Mit	$17.99
8	Soccer Balls	$8.09
11	GameTime HB Patties	$2.39
12	Hot Dog Buns	$1.58
17	Dr. Pepper	$1.20
24	Slim Jims	$1.60
27	Polo Shirt S	$25.18
32	Polo Shirt XXXL	$15.29
44	Docker Slacks 36	$53.98
7	Catchers Mit	$19.99
8	Soccer Balls	$44.95
9	Callaway Pro Golf Club Set	$299.99
10	BallPark Hot Dogs	$1.99
12	Hot Dog Buns	$2.97
13	Ketchup Packets	$0.00

1. The information will be displayed in table format on the screen, showing the date of the report's creation, as well as the dates the report covers.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

View Reservation Report

In order to View the Reservation Report a date range must be entered to select the reservations.



1. Enter the Start Date and End date into the fields. In Chrome, a Date field will be displayed to simplify entry. In other browsers, dates should be entered in yyyy-mm-dd format.
2. Once the dates have been entered, click “Search” to generate the report.

View Reservation Report

The view reservations report displays all the reservation during the specified date range. The information displayed for each reservation is, Reservation ID, Instructor ID and Instructor name (if applicable), Reservation Date, Start Time and End Time for the specified date range

View Reservation Report

Report Span: 2014-04-04 to 2014-05-04

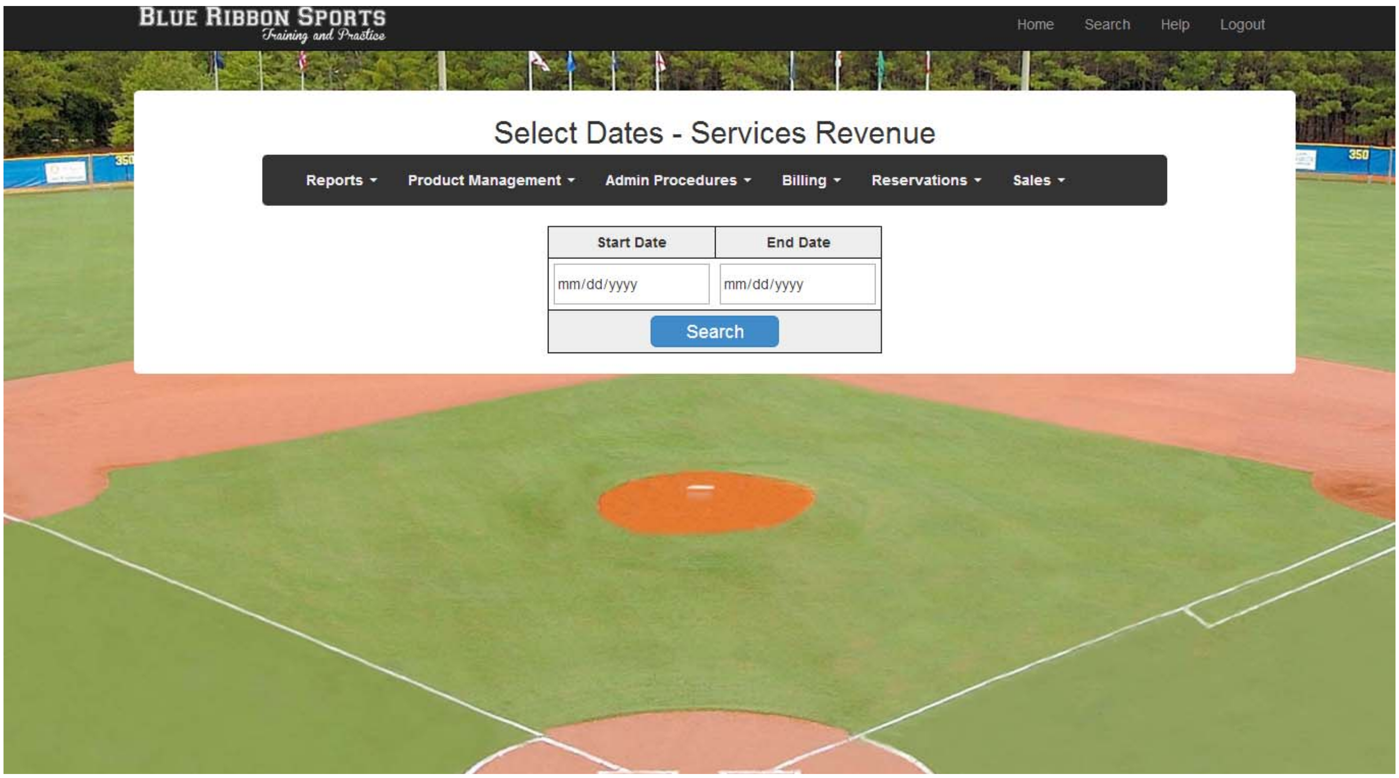
Report Date: 2014-05-04

Reservation ID	Instructor ID	Instructor Name	Client Name	Reservation Date	Start Time	End Time
4	59	Fred Sillysun	Robert Long	2014-04-16	10:15:00	11:15:00
5	55	Tom Lee	Robert Long	2014-04-30	10:00:00	02:00:00
9	52	Mason Alexander	CMCSS - Pisgah Elementry	2014-05-03	08:00:00	11:00:00
11	57	Scott Shumate	Clarksville Little League	2014-05-02	04:00:00	06:00:00
13	50	Sally Smith	Mark Johnson	2014-04-30	10:00:00	14:00:00
14	51	Fred Brown	Sherry Just	2014-05-04	11:00:00	15:00:00

1. The information will be displayed in table format on the screen, showing the date of the report’s creation, as well as the dates the report covers.
2. If the report needs to be printed, the browser’s print function can be used to print to any attached printer.

Services Revenue Report

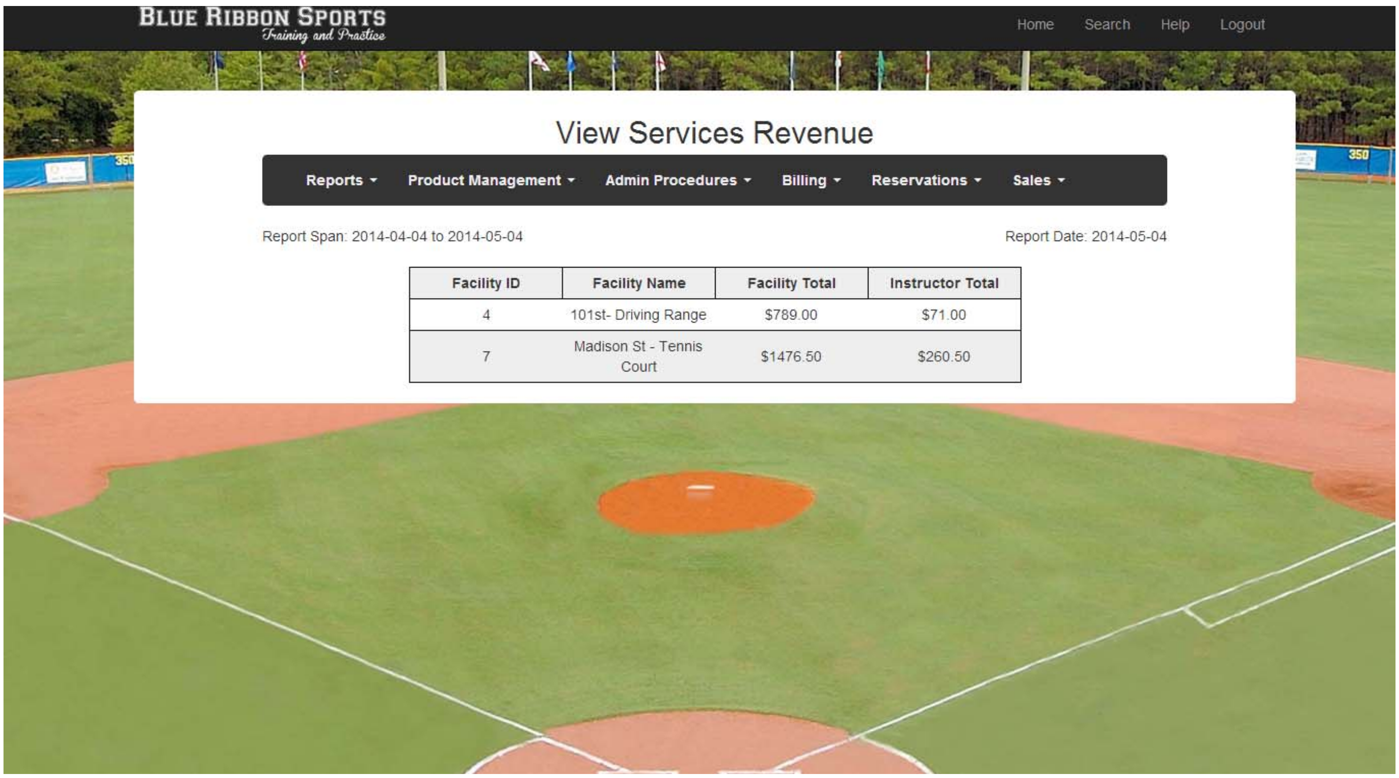
In order to View the Service Revenue Report a date range must be entered to select the reservations.



1. Enter the Start Date and End date into the fields. In Chrome, a Date field will be displayed to simplify entry. In other browsers, dates should be entered in yyyy-mm-dd format.
2. Once the dates have been entered, click “Search” to generate the report.

Services Revenue Report

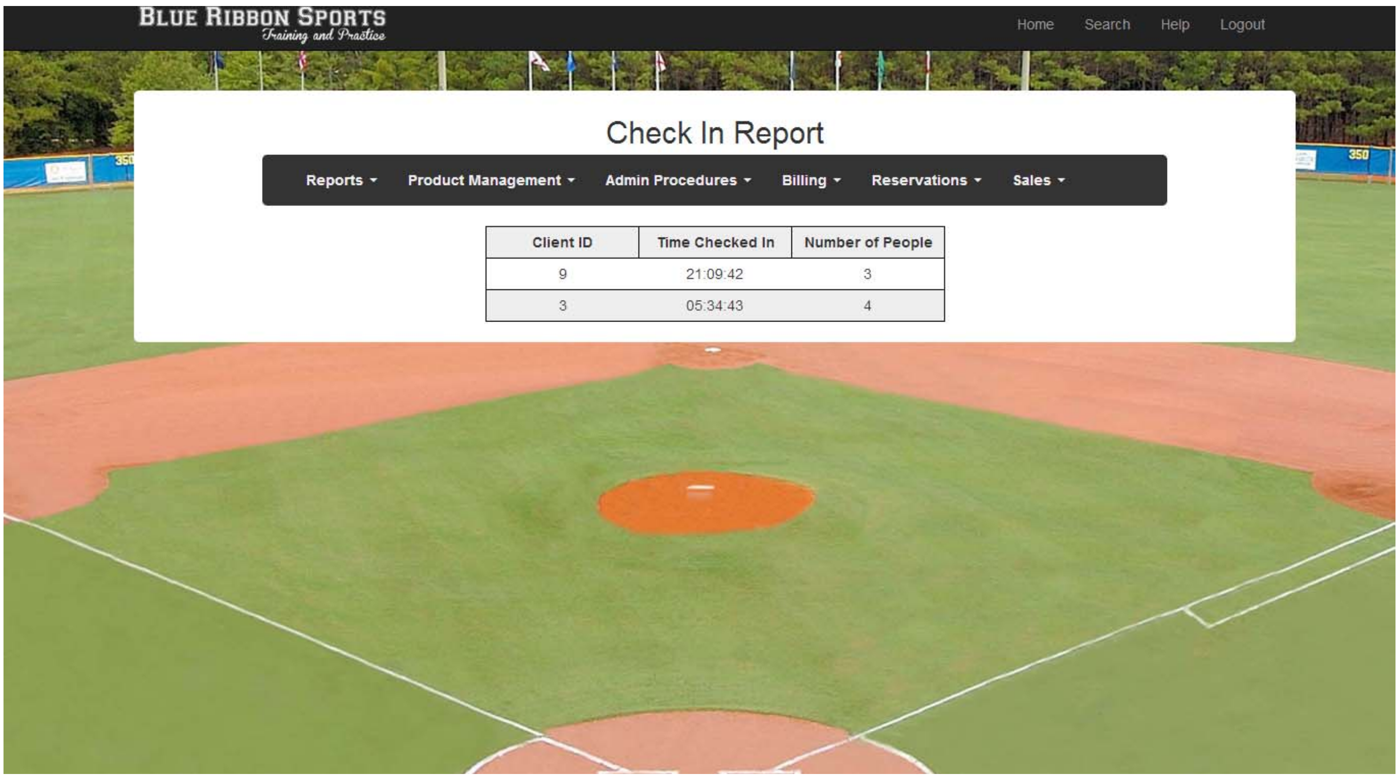
The Services Revenue Report displays the Facility ID, Facility Name, Facility Revenue Total and related Instructor revenue total for the specified date range.



1. The information will be displayed in table format on the screen, showing the date of the report's creation, as well as the dates the report covers.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

Check-in Report

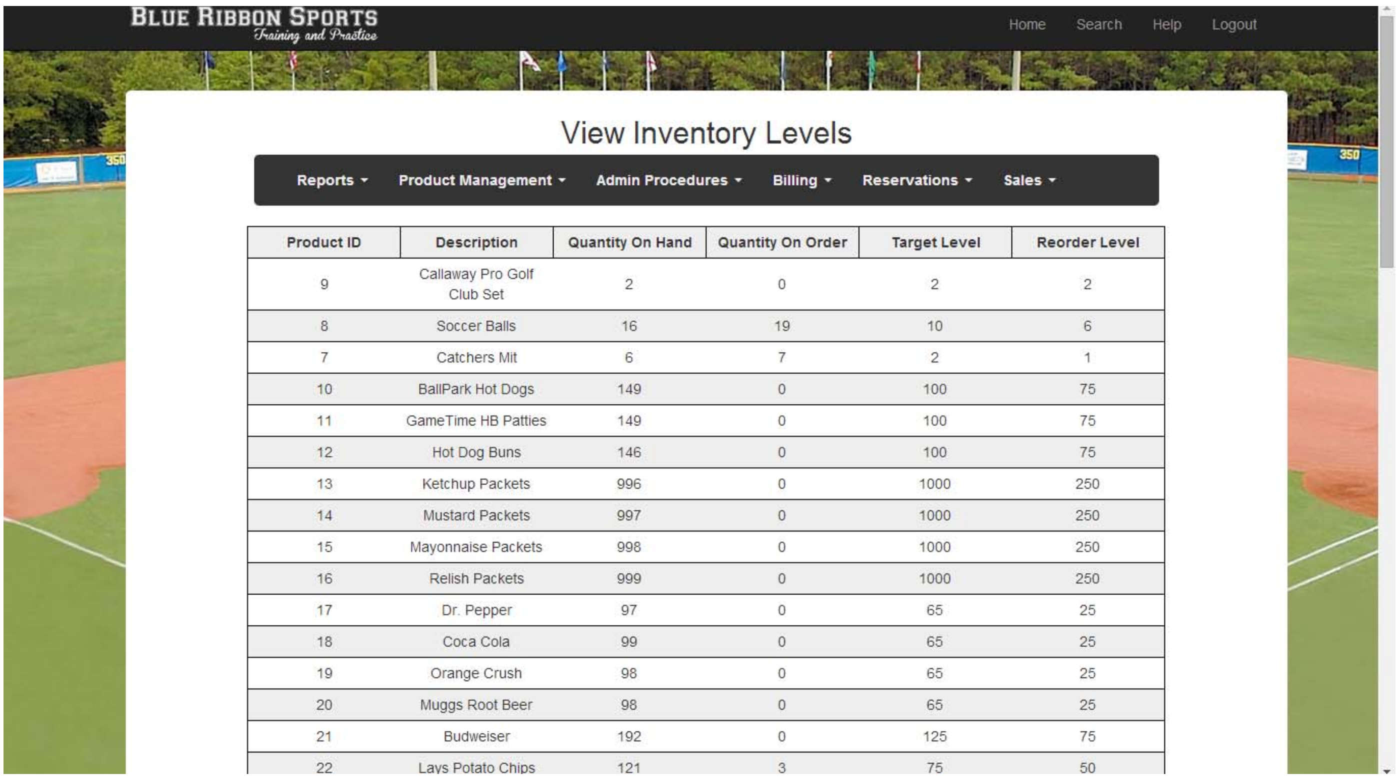
The Check-In Report display's all clients that have check-in and not checked out at the current time.



1. The information will be displayed in table format on the screen.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

Inventory Levels Report

The inventory levels report lists every Product ID and Product Description with the current Quantity on Hand and Quantity on Order, along with the Target and Reorder Levels. This report shows the levels or stock currently in stock or on order.

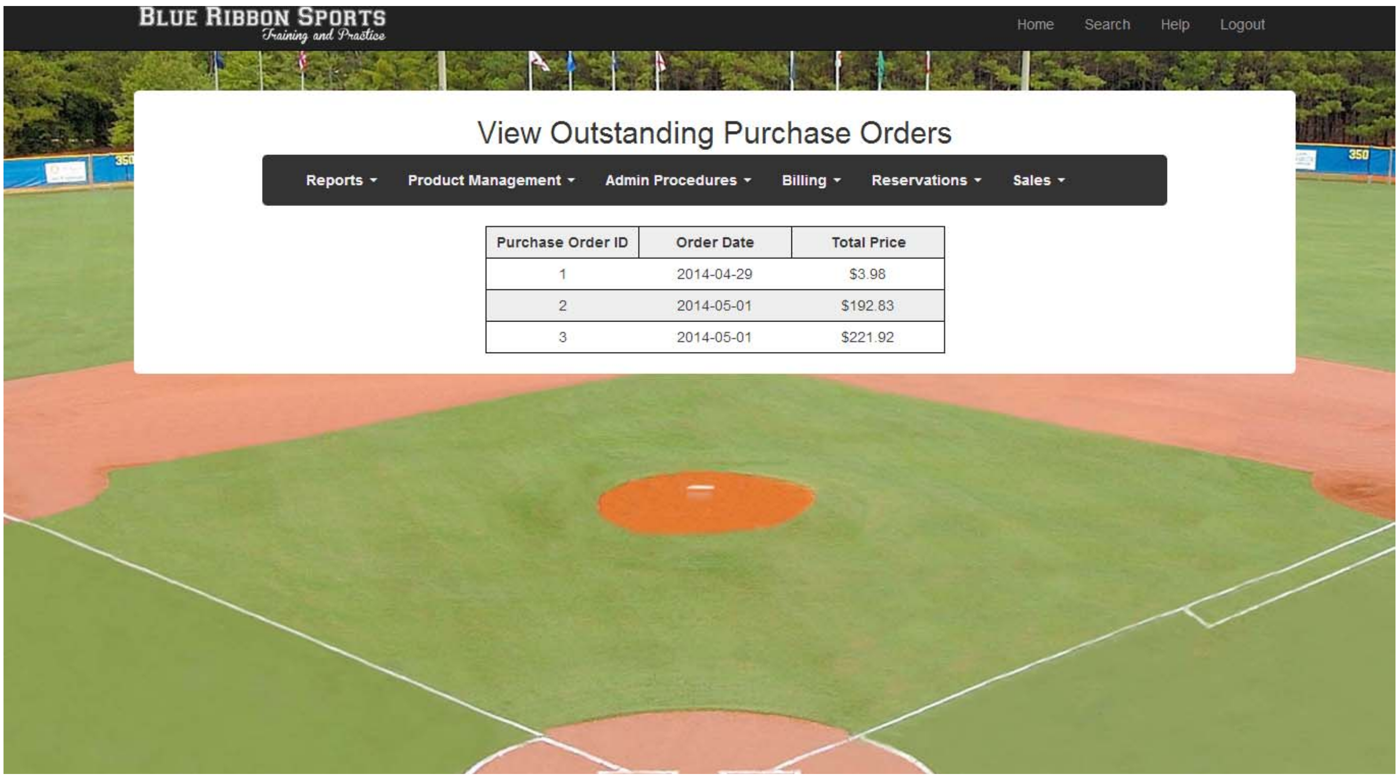


Product ID	Description	Quantity On Hand	Quantity On Order	Target Level	Reorder Level
9	Callaway Pro Golf Club Set	2	0	2	2
8	Soccer Balls	16	19	10	6
7	Catchers Mit	6	7	2	1
10	BallPark Hot Dogs	149	0	100	75
11	GameTime HB Patties	149	0	100	75
12	Hot Dog Buns	146	0	100	75
13	Ketchup Packets	996	0	1000	250
14	Mustard Packets	997	0	1000	250
15	Mayonnaise Packets	998	0	1000	250
16	Relish Packets	999	0	1000	250
17	Dr. Pepper	97	0	65	25
18	Coca Cola	99	0	65	25
19	Orange Crush	98	0	65	25
20	Muggs Root Beer	98	0	65	25
21	Budweiser	192	0	125	75
22	Lays Potato Chips	121	3	75	50

1. The information will be displayed in table format on the screen.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

View Outstanding Purchase Orders

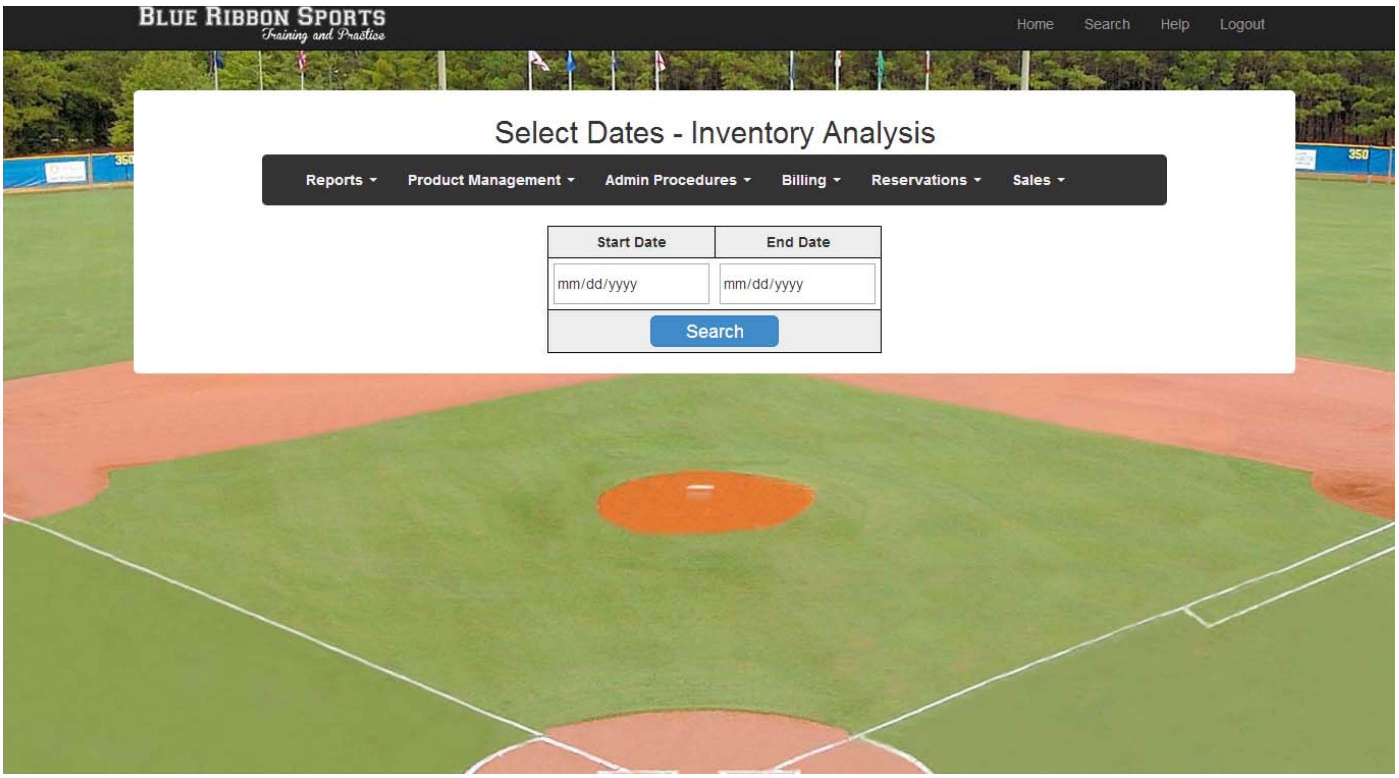
The View Outstanding Orders report displays the Purchase Order ID, date ordered and cost of the order for any order that has been made and not received.



1. The information will be displayed in table format on the screen.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

Inventory Analysis Report

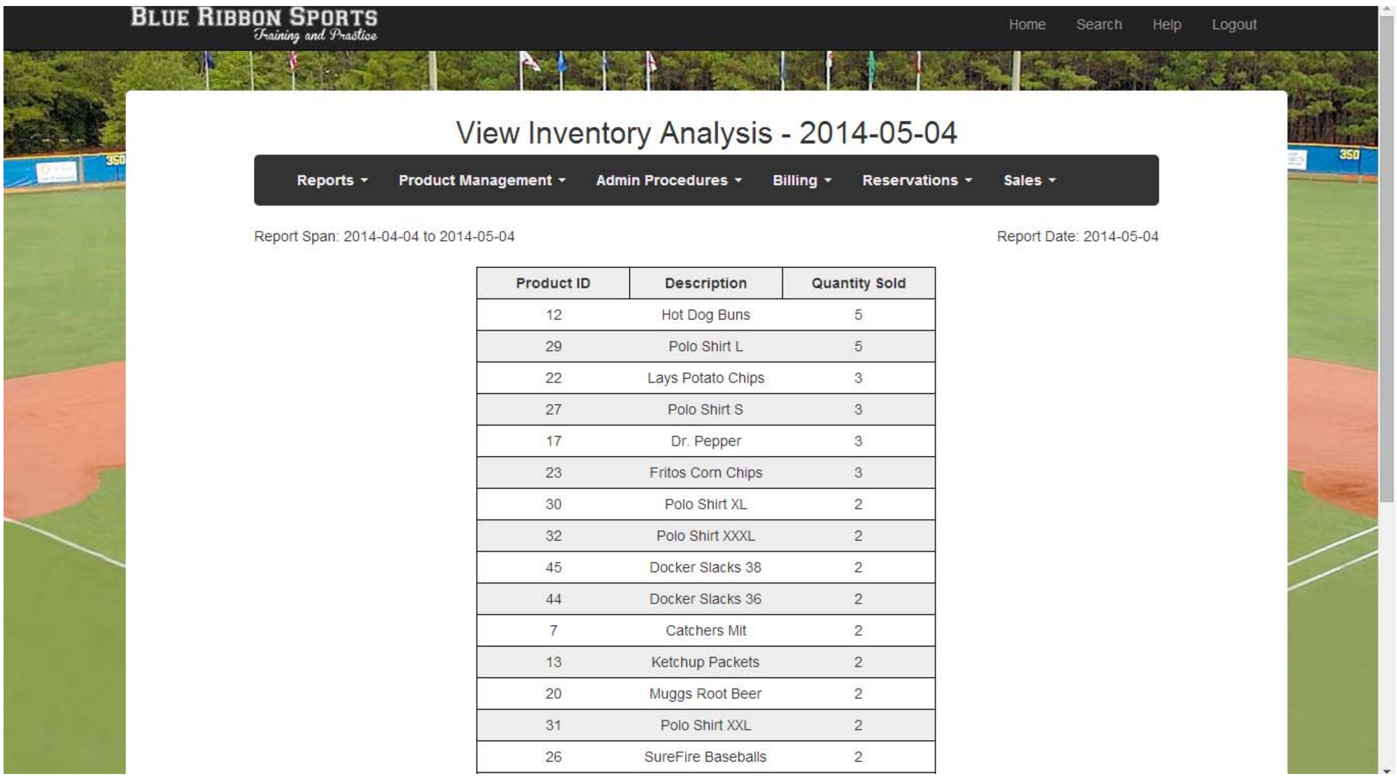
In order to View the Inventory Analysis Report a date range must be entered to select the reservations.



1. Enter the Start Date and End date into the fields. In Chrome, a Date field will be displayed to simplify entry. In other browsers, dates should be entered in yyyy-mm-dd format.
2. Once the dates have been entered, click “Search” to generate the report.

Inventory Analysis Report

The Inventory Analysis report displays the Product ID, description, and Quantity Sold during the specified date range.

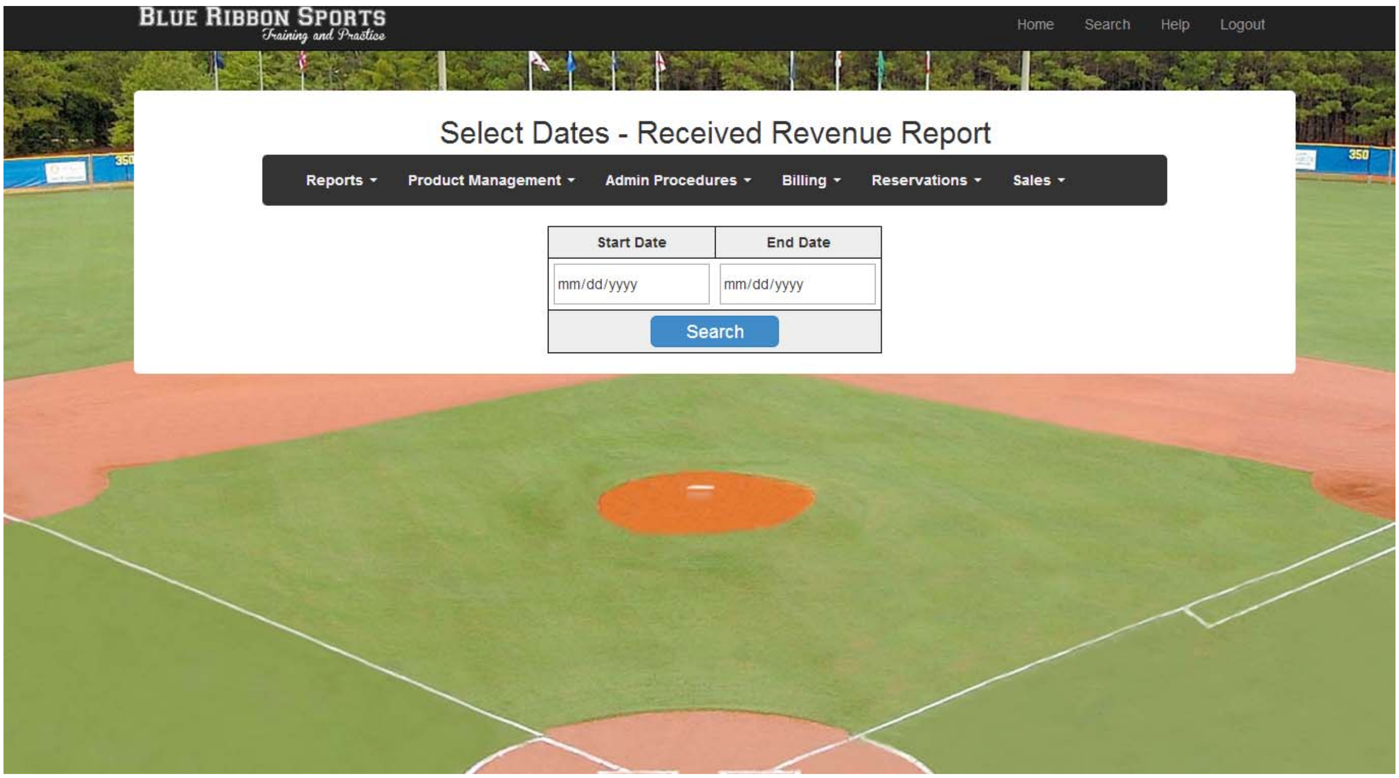


Product ID	Description	Quantity Sold
12	Hot Dog Buns	5
29	Polo Shirt L	5
22	Lays Potato Chips	3
27	Polo Shirt S	3
17	Dr. Pepper	3
23	Fritos Corn Chips	3
30	Polo Shirt XL	2
32	Polo Shirt XXXL	2
45	Docker Slacks 38	2
44	Docker Slacks 36	2
7	Catchers Mit	2
13	Ketchup Packets	2
20	Muggs Root Beer	2
31	Polo Shirt XXL	2
26	SureFire Baseballs	2

1. The information will be displayed in table format on the screen, showing the date of the report's creation, as well as the dates the report covers.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

Received Revenue Report

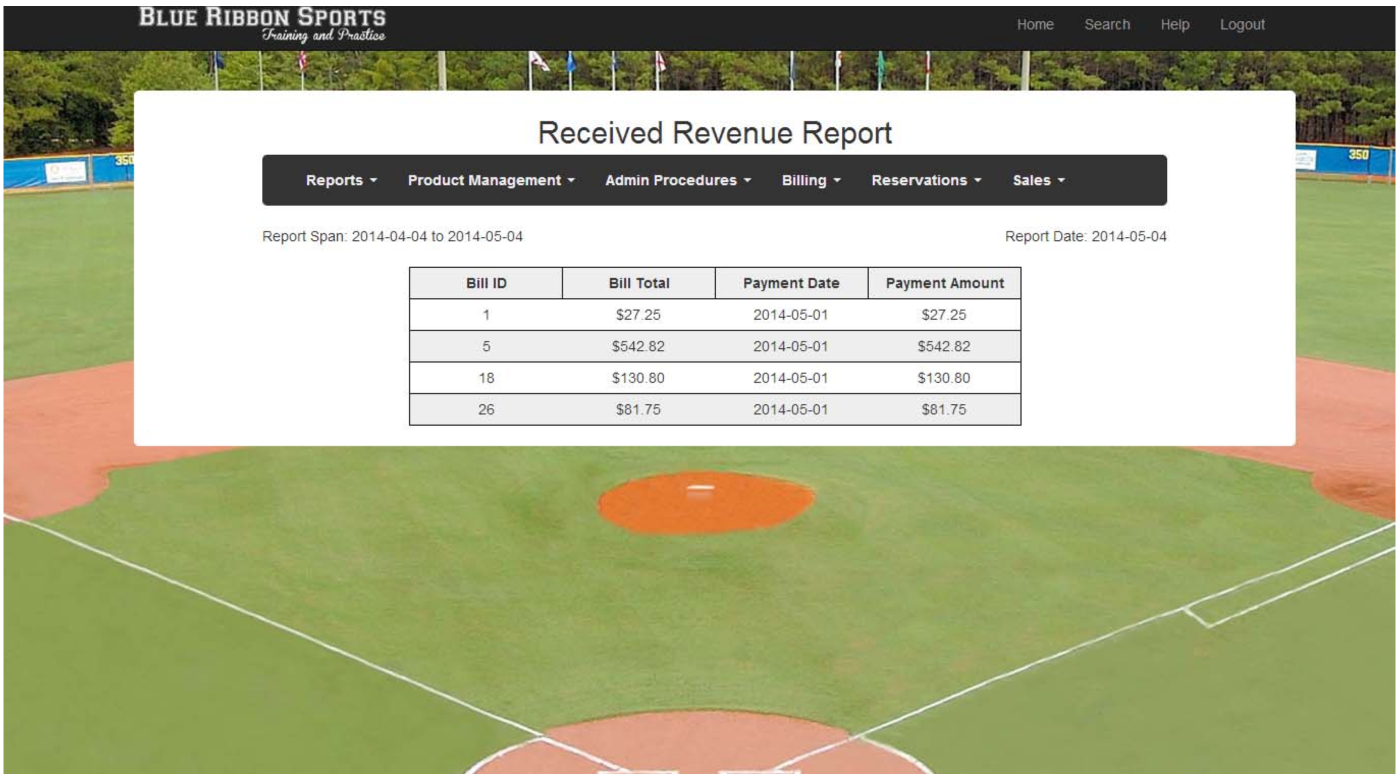
In order to View the Received Revenue Report a date range must be entered to select the reservations.



1. Enter the Start Date and End date into the fields. In Chrome, a Date field will be displayed to simplify entry. In other browsers, dates should be entered in yyyy-mm-dd format.
2. Once the dates have been entered, click “Search” to generate the report.

Received Revenue Report

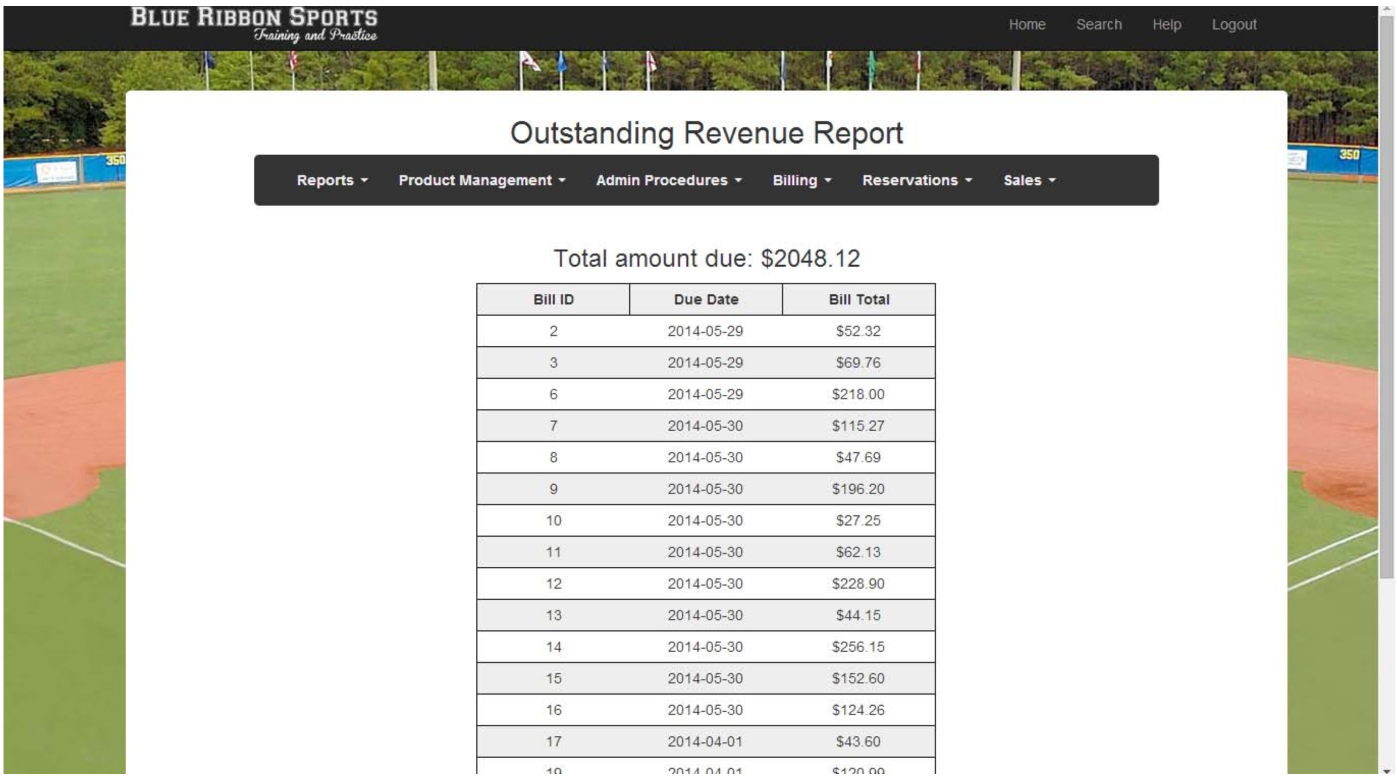
The Received Revenue report displays the Bill ID, Bill Total, Payment Date and Payment Amount for all payments received for Reservations and Instructor Fee's during the specified date range.



1. The information will be displayed in table format on the screen, showing the date of the report's creation, as well as the dates the report covers.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

Outstanding Revenue Report

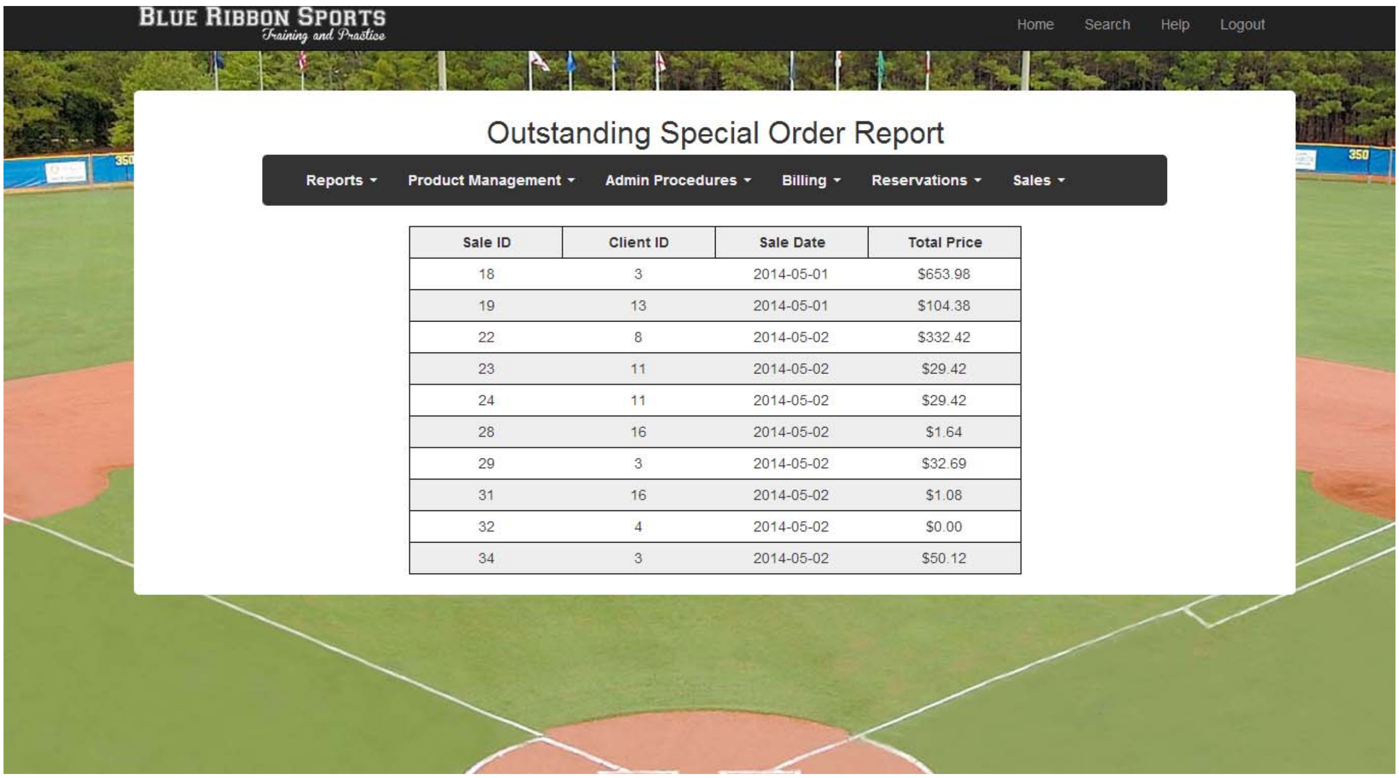
The Outstanding Revenue report displays the Bill ID, Due Date and Total for every Reservation and Instructor bill that has been generated and not paid for regardless of how recent or old the bill is. A grand total of is displayed at the top of the page.



1. The information will be displayed in table format on the screen.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

Outstanding Special Order Report

The Outstanding Special Orders reports displays the Sale ID, Client ID, Sale Date and Total Price for any merchandise order placed by a customer that has not been fulfilled.

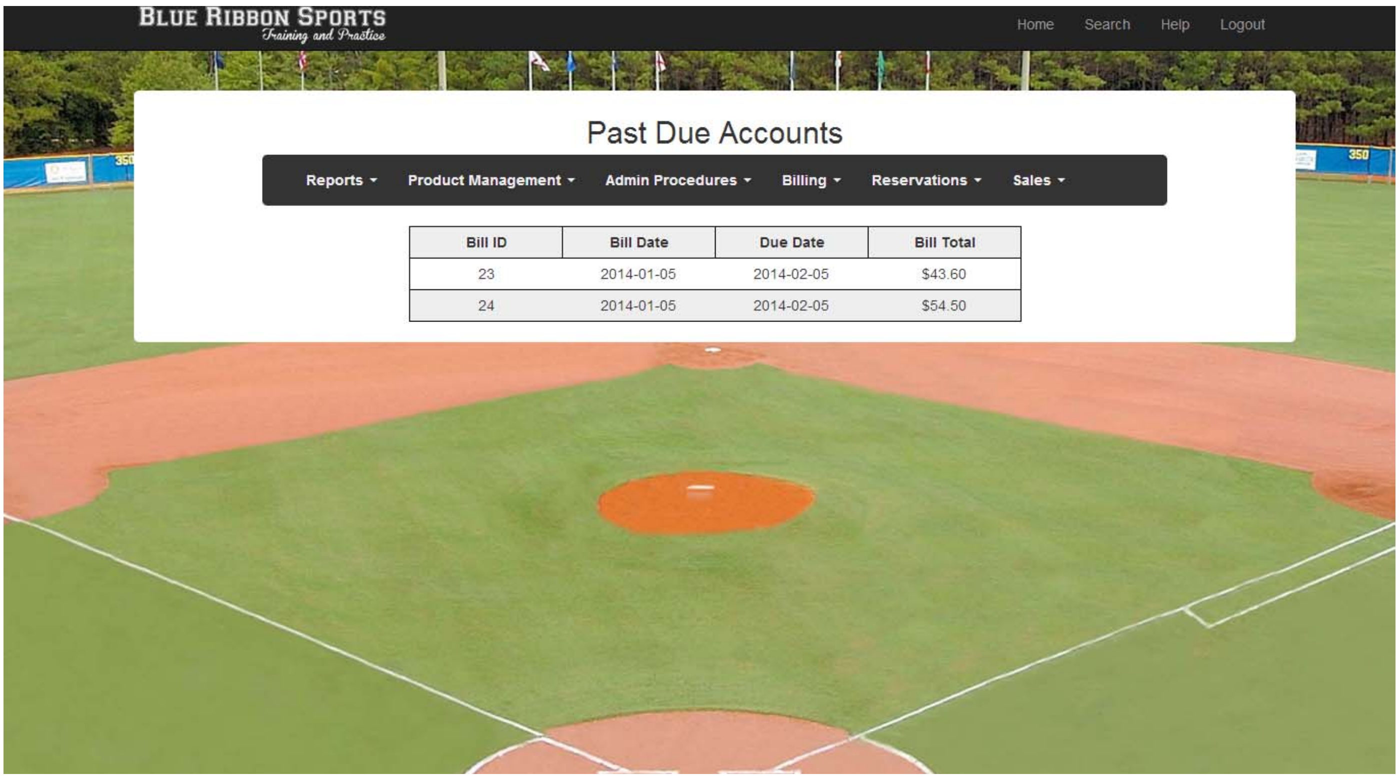


Sale ID	Client ID	Sale Date	Total Price
18	3	2014-05-01	$653.98
19	13	2014-05-01	$104.38
22	8	2014-05-02	$332.42
23	11	2014-05-02	$29.42
24	11	2014-05-02	$29.42
28	16	2014-05-02	$1.64
29	3	2014-05-02	$32.69
31	16	2014-05-02	$1.08
32	4	2014-05-02	$0.00
34	3	2014-05-02	$50.12

1. The information will be displayed in table format on the screen.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

Past Due Accounts Report

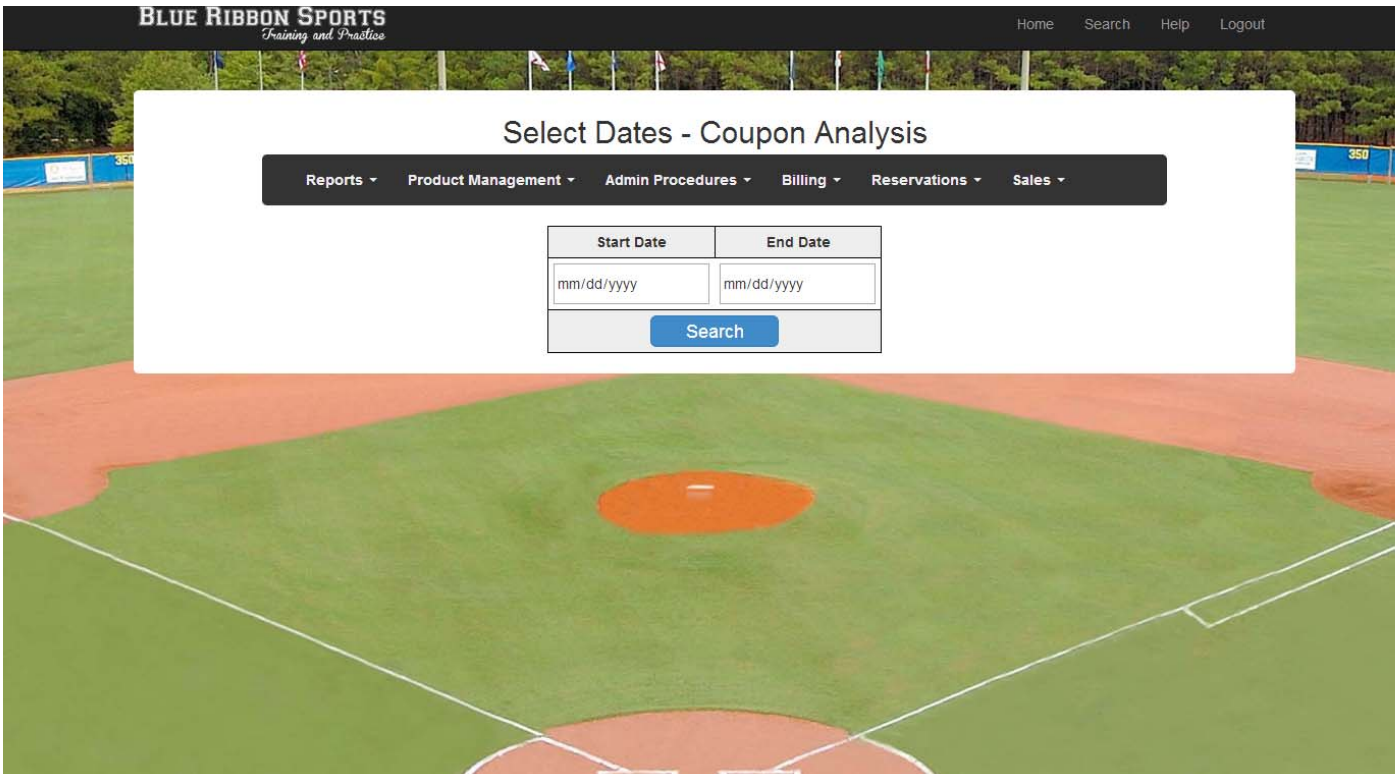
The Past Due Accounts report displays the Bill ID, Bill Date, Due Date and Bill Total for any bill that is 15 days past the due date and un-paid.



1. The information will be displayed in table format on the screen.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

Coupon Analysis Report

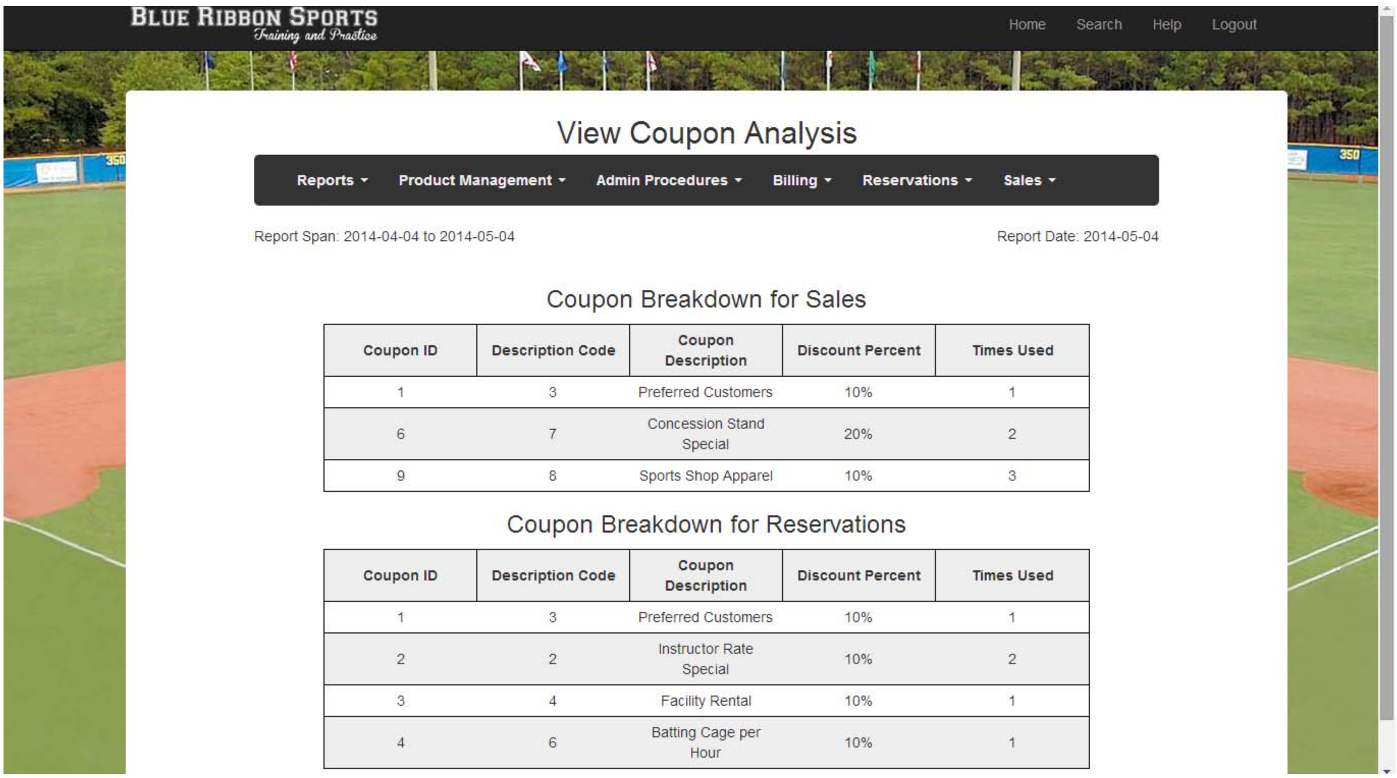
In order to View the Coupon Analysis Report a date range must be entered.



1. Enter the Start Date and End date into the fields. In Chrome, a Date field will be displayed to simplify entry. In other browsers, dates should be entered in yyyy-mm-dd format.
2. Once the dates have been entered, click “Search” to generate the report.

Coupon Analysis Report

The Coupon Analysis report displays the Coupon ID, Description Code, Discount Percent and the Times Used during the specified date range. It is separated into two categories coupons used to purchase merchandise (sales) and coupons used towards reservations



Coupon Breakdown for Sales

Coupon ID	Description Code	Coupon Description	Discount Percent	Times Used
1	3	Preferred Customers	10%	1
6	7	Concession Stand Special	20%	2
9	8	Sports Shop Apparel	10%	3

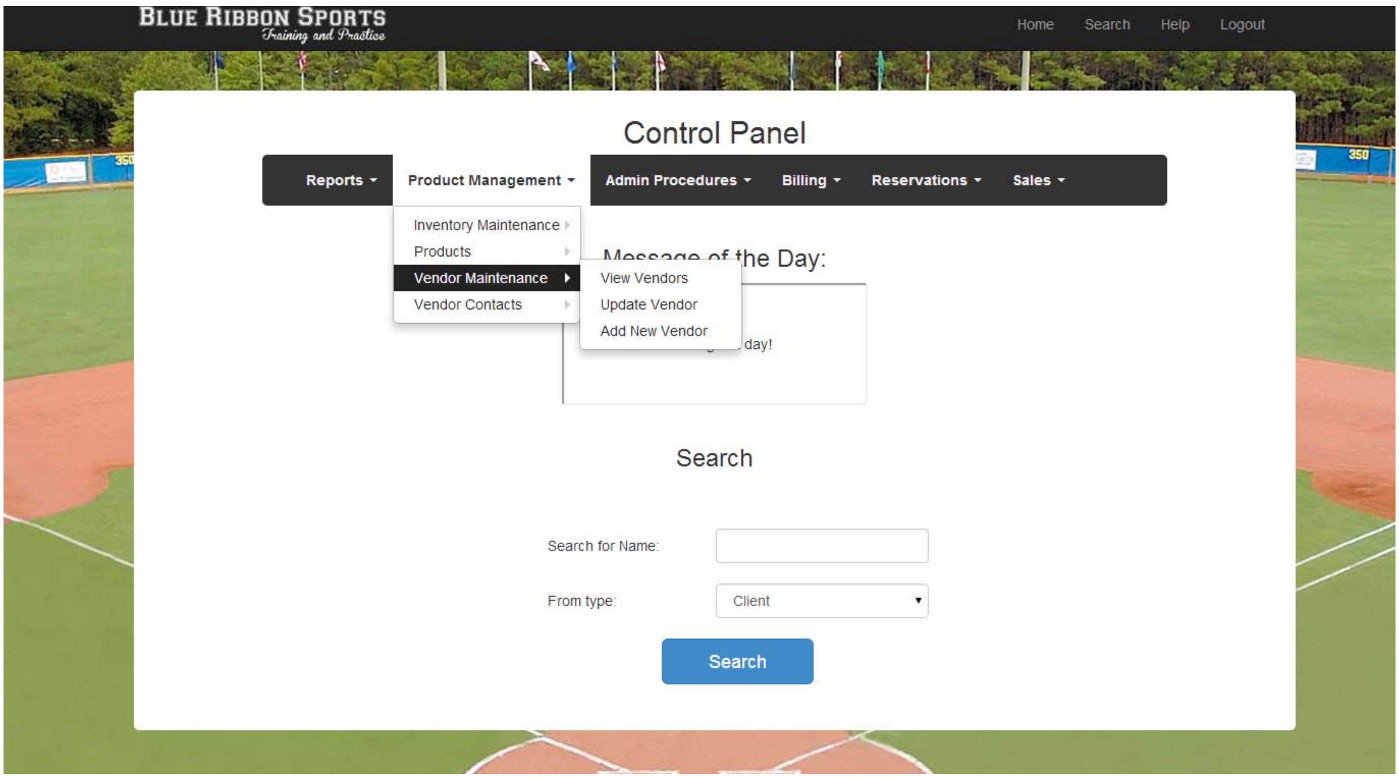
Coupon Breakdown for Reservations

Coupon ID	Description Code	Coupon Description	Discount Percent	Times Used
1	3	Preferred Customers	10%	1
2	2	Instructor Rate Special	10%	2
3	4	Facility Rental	10%	1
4	6	Batting Cage per Hour	10%	1

1. The information will be displayed in table format on the screen, showing the date of the report’s creation, as well as the dates the report covers.
2. If the report needs to be printed, the browser’s print function can be used to print to any attached printer.

Navigation – Product Management

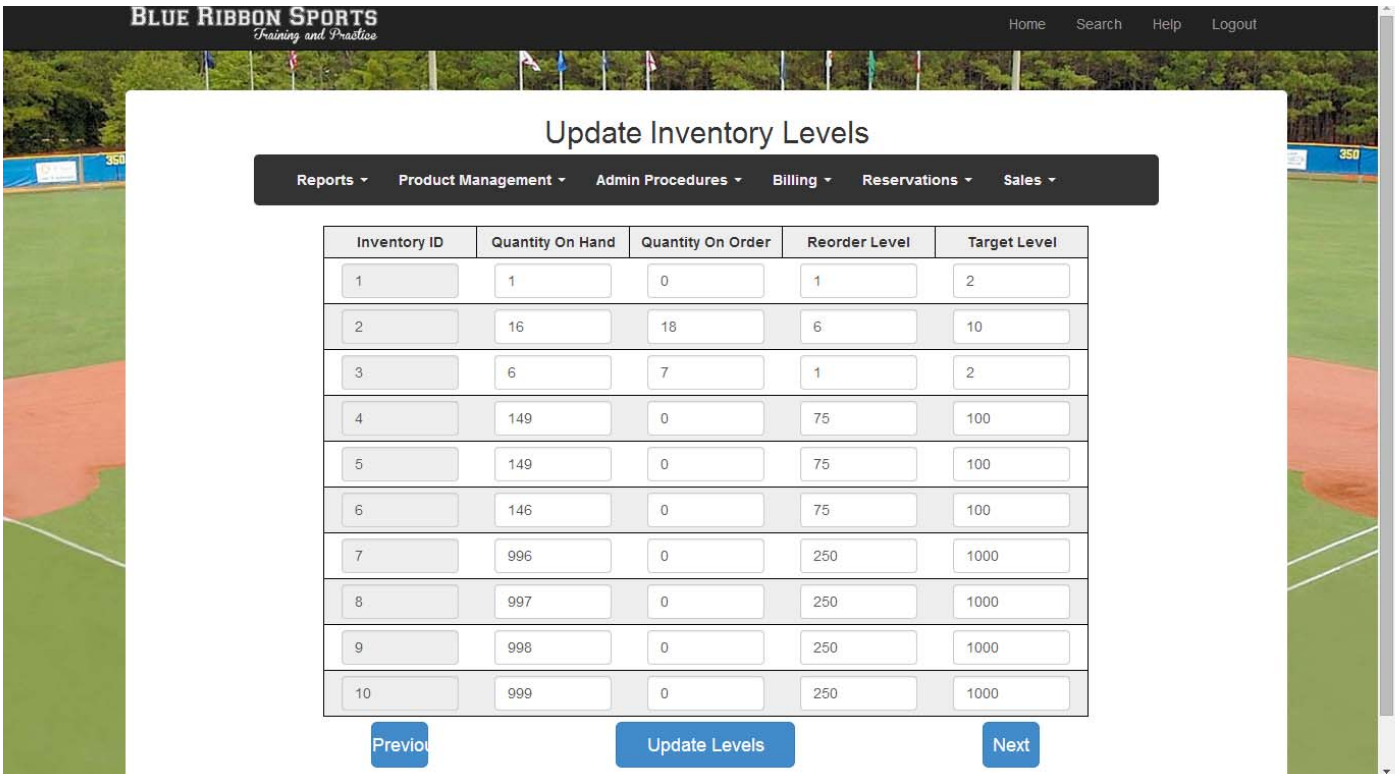
The Product Management section of the navigation bar provides access to the inventory, product, and vendor information contained in the system, separated into four categories.



1. To access the Product Management dropdown, click on Product Management on the Navigation bar.
2. If a small gray triangle is listed to the right of the item in the dropdown, it contains further menu options. Hover over the category to see more options.
3. Click on the desired page to navigate to it.

Update Inventory Levels

The Update Inventory Levels screen displays the Inventory ID, Quantity on Hand, Quantity on Order, Reorder Level and Target Level for all items in inventory. From this screen you can update all the displayed fields with the exception of the Inventory ID.

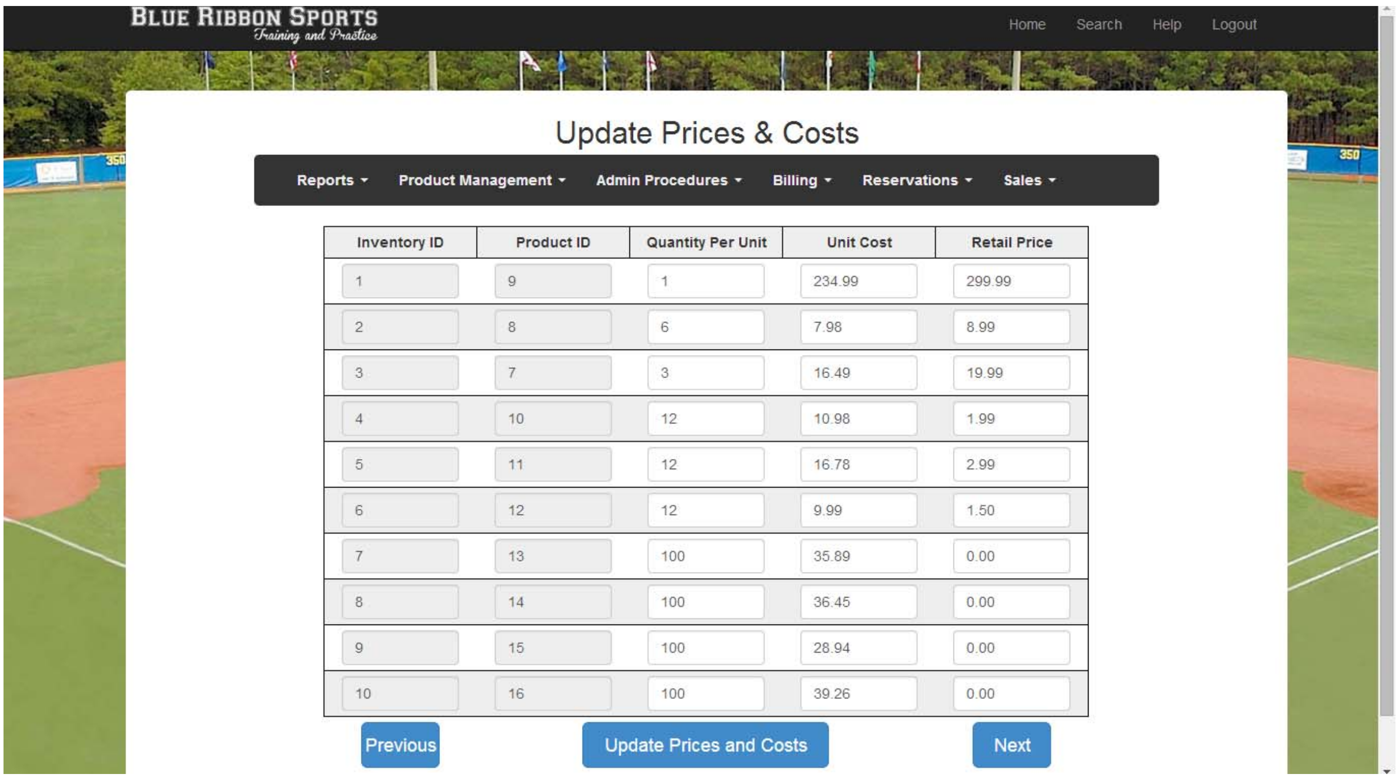


Inventory ID	Quantity On Hand	Quantity On Order	Reorder Level	Target Level
1	1	0	1	2
2	16	18	6	10
3	6	7	1	2
4	149	0	75	100
5	149	0	75	100
6	146	0	75	100
7	996	0	250	1000
8	997	0	250	1000
9	998	0	250	1000
10	999	0	250	1000

1. The Update Inventory Levels screen will display 10 inventory items at a time, with fields for Quantity On Hand, Quantity ON Order, Reorder Level, and Target level.
2. Make any changes for each Inventory item on the screen, then click Update Levels to save the changes.
3. Use Next and Previous to navigate 10 items forward or backward in the Inventory.
4. Changes made will not be saved unless Update Levels is clicked. Making changes then clicking Next or Previous will not save changes.

Update Prices & Costs

The Update Price/Cost screen displays the Inventory ID, Product ID, Quantity per Unit, Unit Cost and Retail price. From this screen you can update all the displayed fields with the exception of the Inventory ID, and Product ID. The Quantity per Unit is the number of items you received when the quantity ordered is one (i.e. 12 hotdog buns per package).

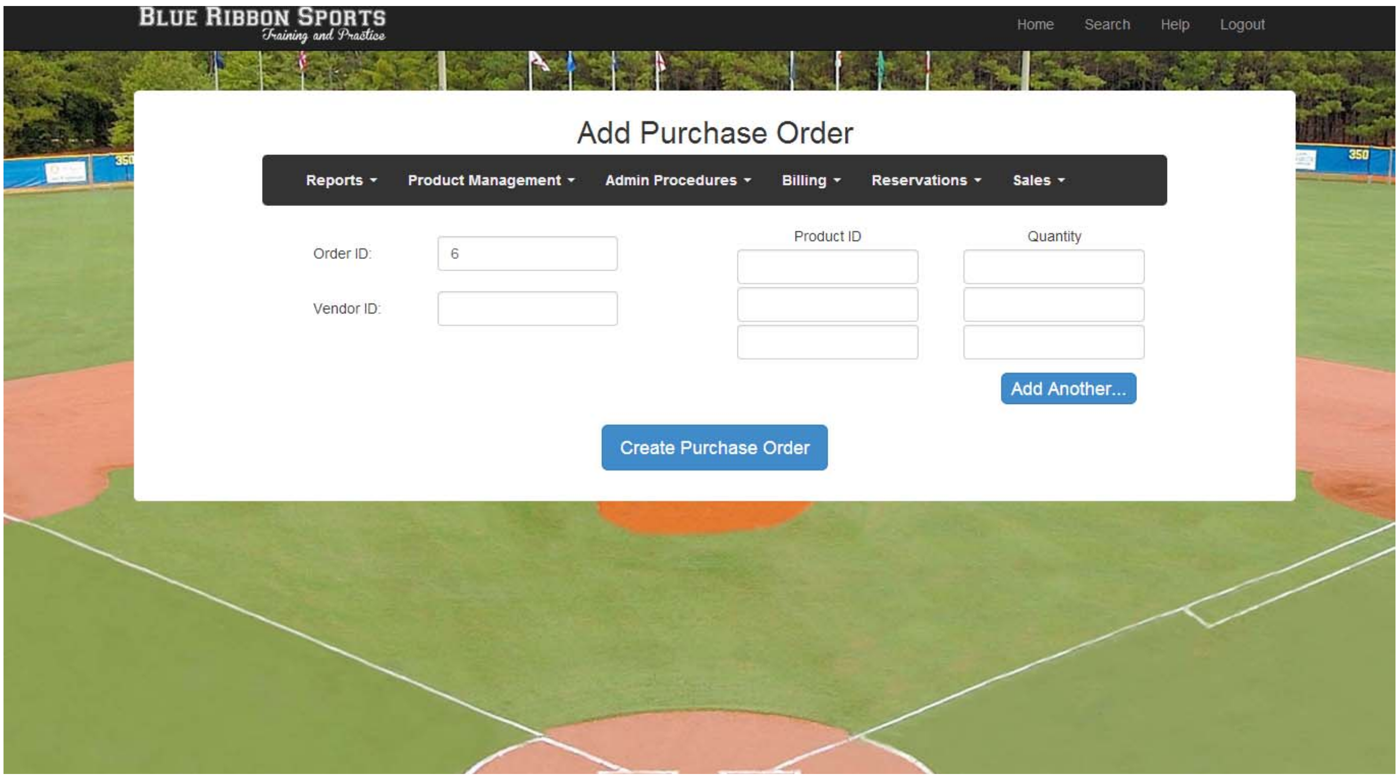


Inventory ID	Product ID	Quantity Per Unit	Unit Cost	Retail Price
1	9	1	234.99	299.99
2	8	6	7.98	8.99
3	7	3	16.49	19.99
4	10	12	10.98	1.99
5	11	12	16.78	2.99
6	12	12	9.99	1.50
7	13	100	35.89	0.00
8	14	100	36.45	0.00
9	15	100	28.94	0.00
10	16	100	39.26	0.00

1. The Update Prices & Costs screen will display 10 inventory items at a time, with fields for Product ID, Quantity per Unit, Unit Cost, and Retail Price.
2. Make any changes for each Inventory item on the screen, then click Update Prices and Costs to save the changes.
3. Use Next and Previous to navigate 10 items forward or backward in the Inventory.
4. Changes made will not be saved unless Update Prices & Costs is clicked. Making changes then clicking Next or Previous will not save changes.

Add Purchase Order

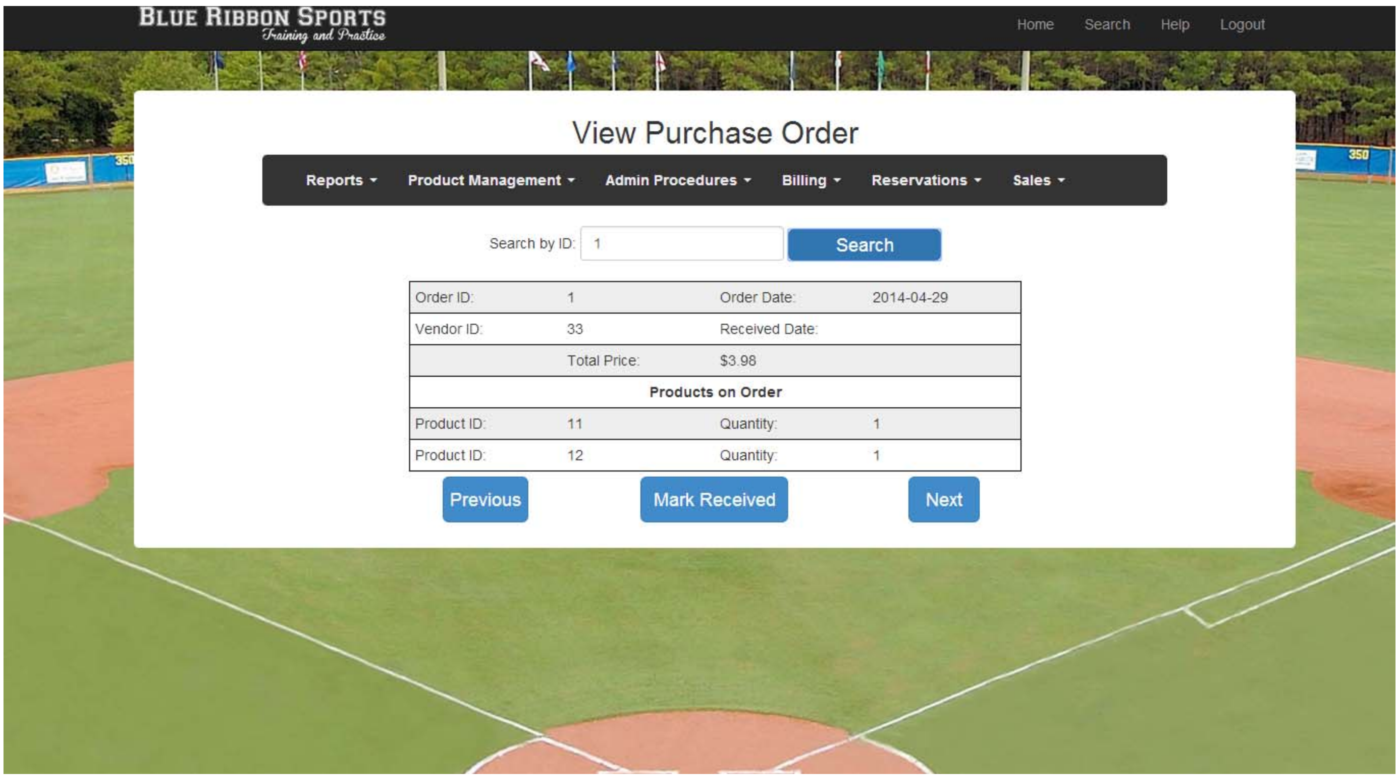
The Add Purchase Oder screen allow for the entry of a new purchase order into the system.



1. The next available Purchase Order ID will be populated into the form. You must then enter the Vendor ID and a Product ID and Quantity for all items on the order.
2. If more than 3 items are on the order, click “Add Another” to add more Product ID and Quantity fields.
3. Once complete, click the “Create Purchase Order” button to create the Purchase Order.
4. If any required fields are left blank, you will be prompted to enter them before the Create Purchase Order button will work.

View Purchase Order

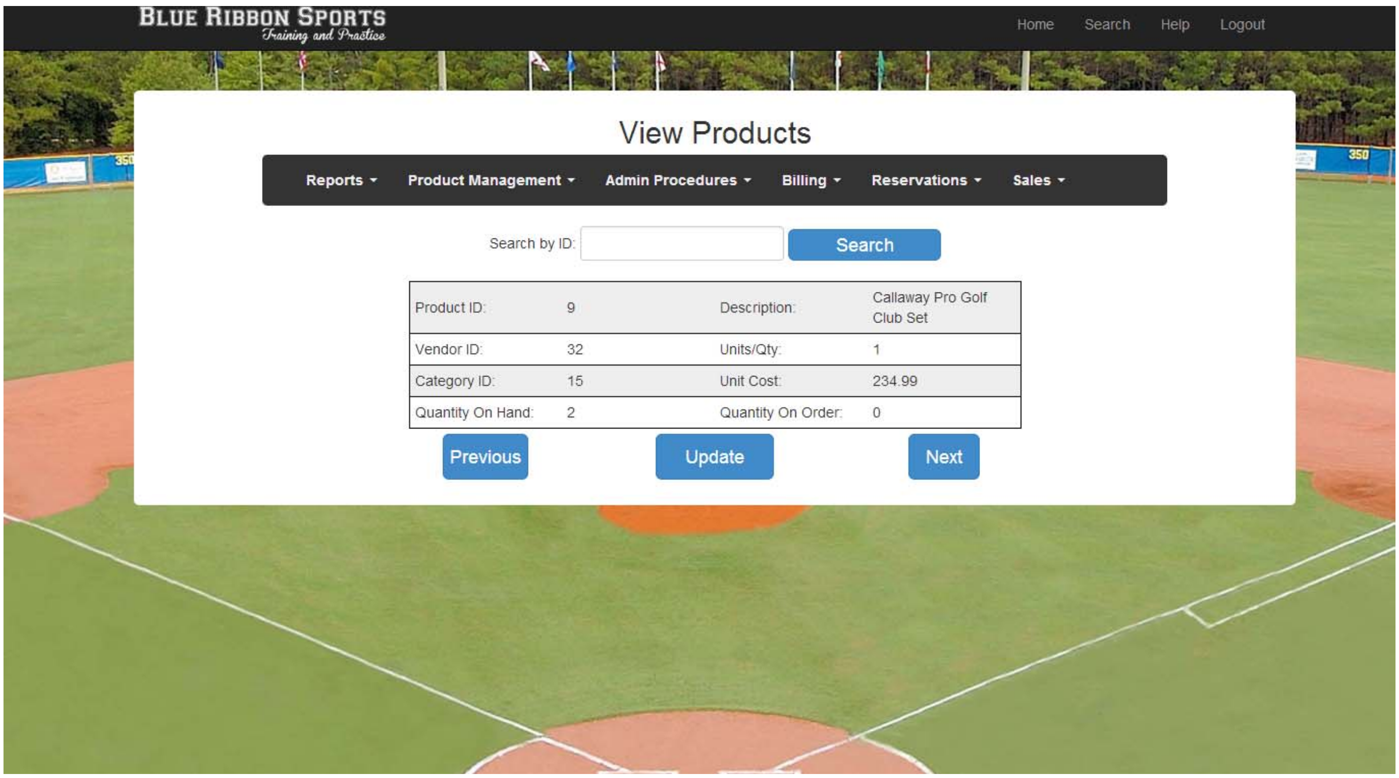
The View Purchase Order screen displays any individual purchase order. The Order ID, Vendor ID, Date Ordered, Date Received (if applicable) , Total Price, Product ID and Quantity Ordered will be displayed for the selected purchase order.



1. To search for a specific purchase order, enter the Purchase Order ID in the Search by ID field and click Search. To browse forward and backward through orders, click on the Next and Previous buttons.
2. To mark a purchase order that does not already have a received date as received, view the Purchase Order and click the Mark Received button.

View Products

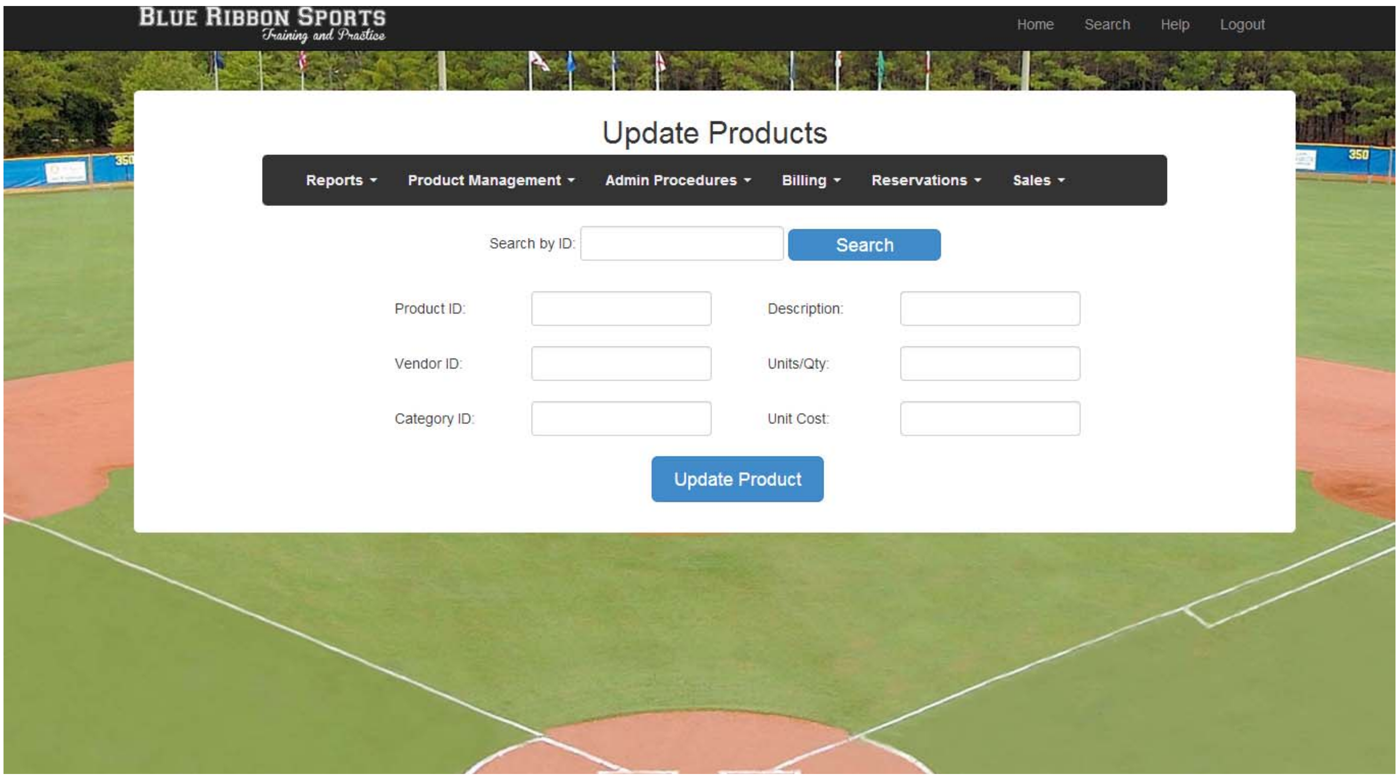
The View Products screen displays details pertaining to a specific product. The Product ID, Product Description, Vendor ID, Units/Quantity, Category ID, Unit Cost, Quantity on Hand and Quantity on Order will be displayed for the selected product.



1. To search for a specific product, enter the Product ID in the Search by ID field and click Search. To browse forward and backward through products, click on the Next and Previous buttons.
2. If the details of a selected product need to be updated, click on the Update button to be sent to the Update Product screen (Page 82) for this Product.

Update Product

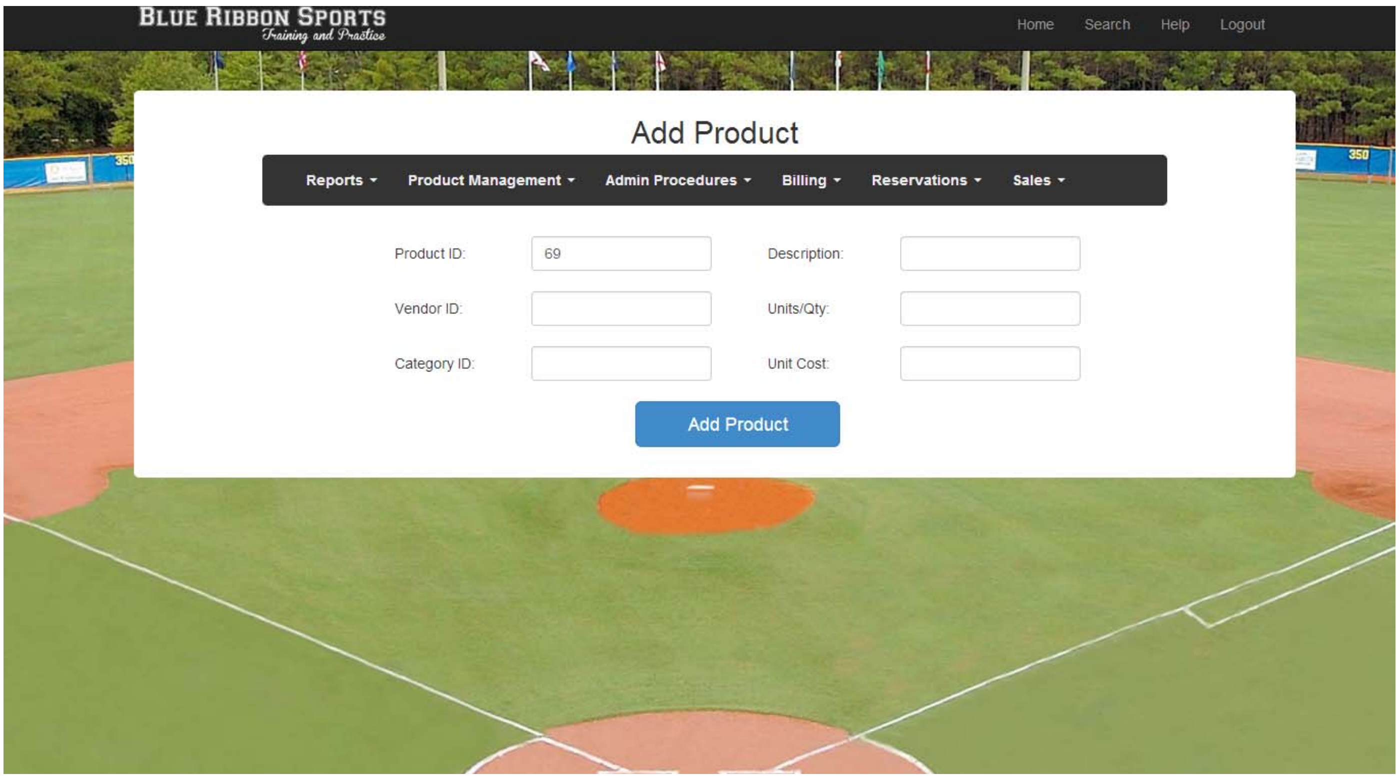
The Update Products screen displays details pertaining to a specific product. The Product ID, Product Description, Vendor ID, Units/Quantity, Category ID, Unit Cost, Quantity on Hand and Quantity on Order will be displayed for the selected product in an editable format.



1. To update an existing product, enter the Product ID in the “Search by ID” field and click “Search.”
2. The Product’s existing information will be loaded into the form.
3. Perform any required updates and then click “Update Product.”
4. If any required fields are left blank, you will be prompted to enter them before the “Update Product” button will work.

Add Product

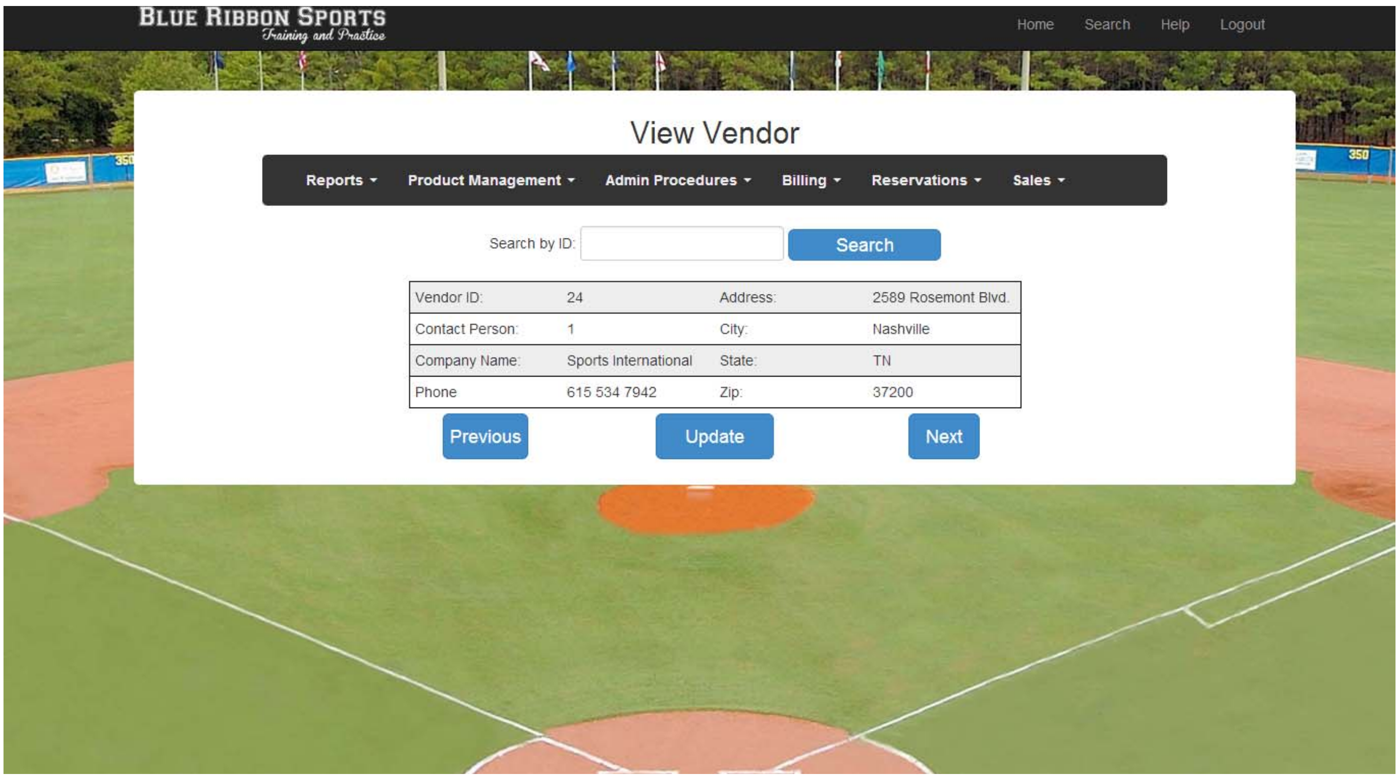
The Add Product screen allows for the entry of a new product into the system.



1. The next available Product ID will be populated into the form. You must then enter the Vendor ID, Category ID, Description, Units/Qty, and Unit Cost.
2. Once complete, click the “Add Product” button to create the new Product.
3. If any required fields are left blank, you will be prompted to enter them before the Add Product button will work.

View Vendor

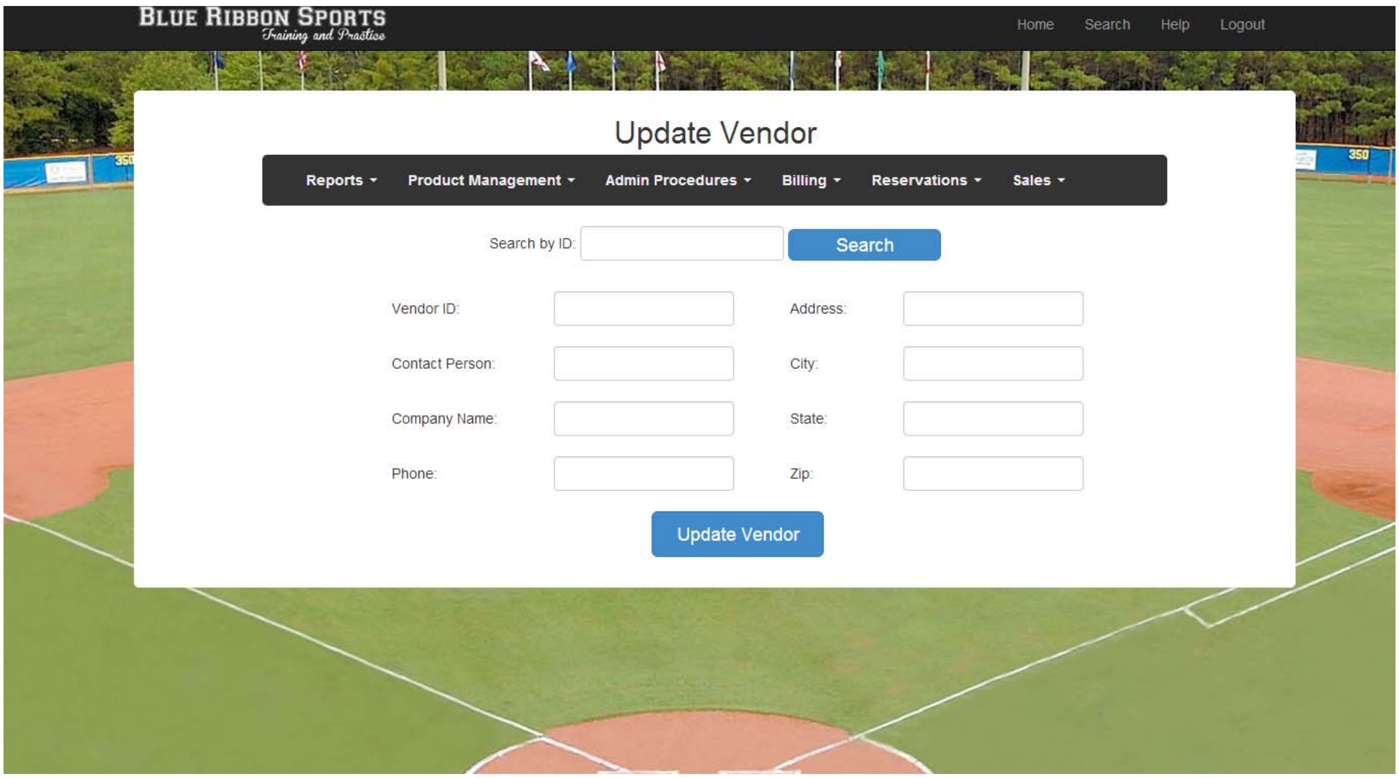
The View Vendor screen displays details for any individual Vendor. The Vendor ID, Full Address, Contact Person ID, Company Name and Phone Number will be displayed for the selected



1. To search for a specific vendor, enter the Vendor ID in the Search by ID field and click Search. To browse forward and backward through vendors, click on the Next and Previous buttons.
2. If the details of a selected vendor need to be updated, click on the Update button to be sent to the Update Vendor screen (Page 85) for this vendor.

Update Vendor

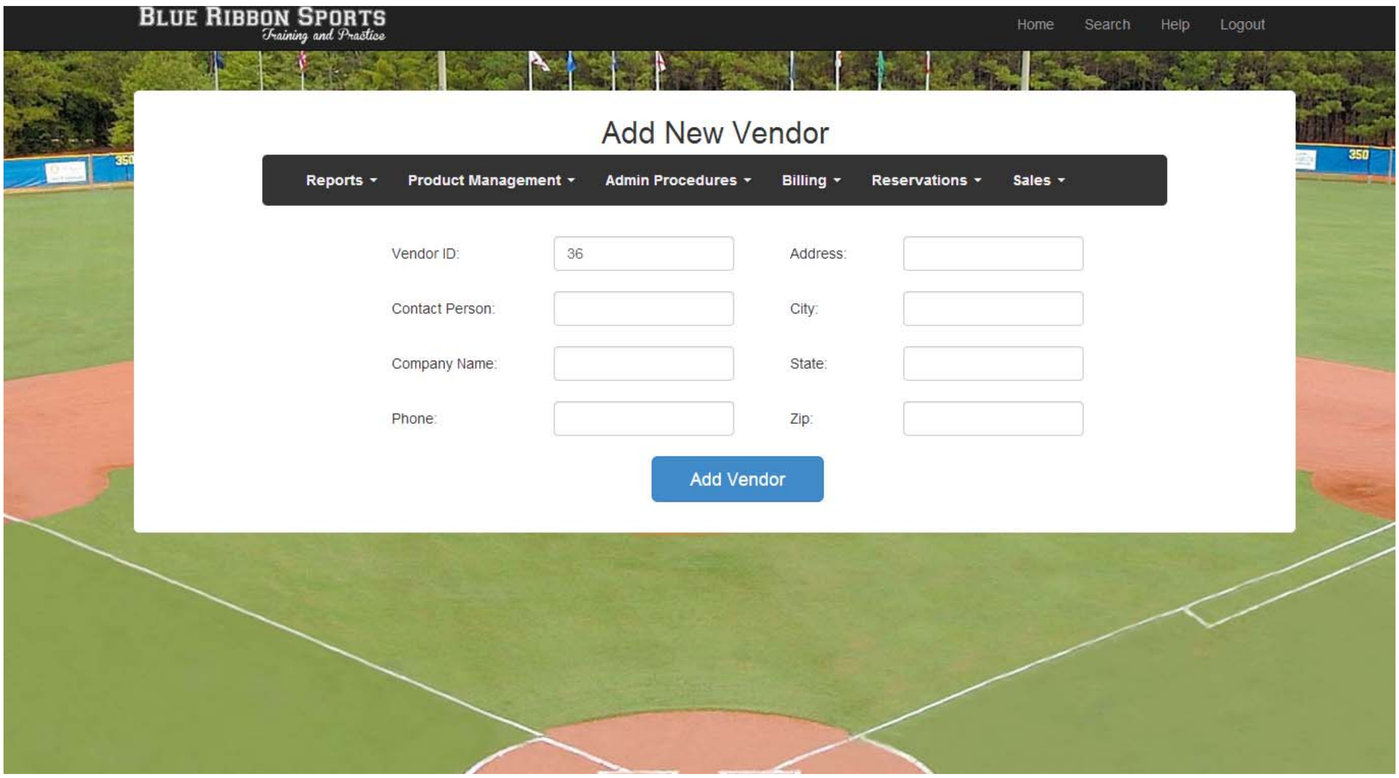
The Update Vendor screen displays details for any individual Vendor. The Vendor ID, Full Address, Contact Person ID, Company Name and Phone Number will be displayed for the selected Vendor in an editable format.



1. To update an existing vendor, enter the Vendor ID in the “Search by ID” field and click “Search.”
2. The Vendor’s existing information will be loaded into the form.
3. Perform any required updates and then click “Update Vendor.”
4. If any required fields are left blank, you will be prompted to enter them before the “Update Vendor” button will work.

Add New Vendor

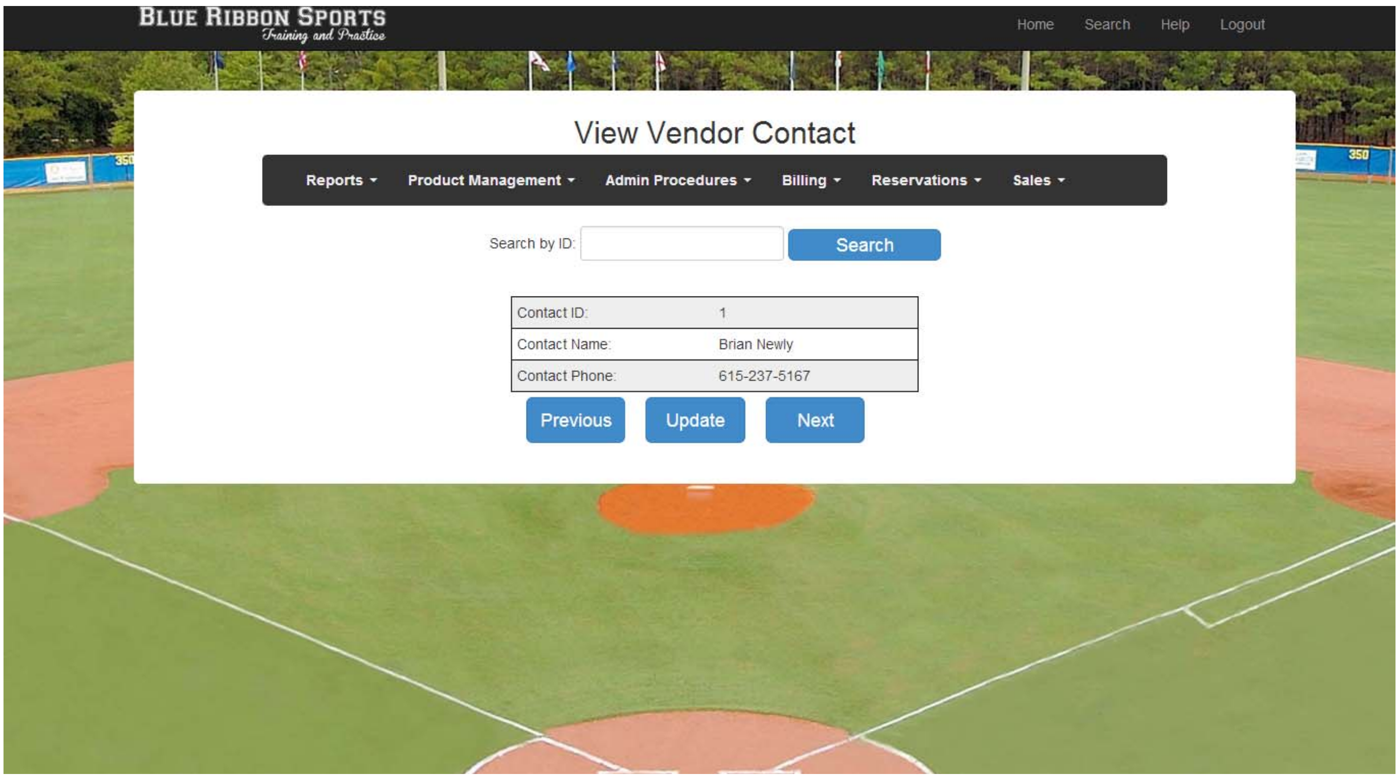
The Add New Vendor screen allows for the entry of a new Vendor into the system.



1. The next available Vendor ID will be populated into the form. You must then enter the Contact Person's ID, Company Name, Phone Number, Street Address, City, State, and Zip.
2. If the Contact Person for this vendor does not exist yet, go to the Add Vendor Contact screen (Page 89).
3. Once complete, click the "Add Vendor" button to create the Vendor.
4. If any required fields are left blank, you will be prompted to enter them before the Add Vendor button will work.

View Vendor Contact

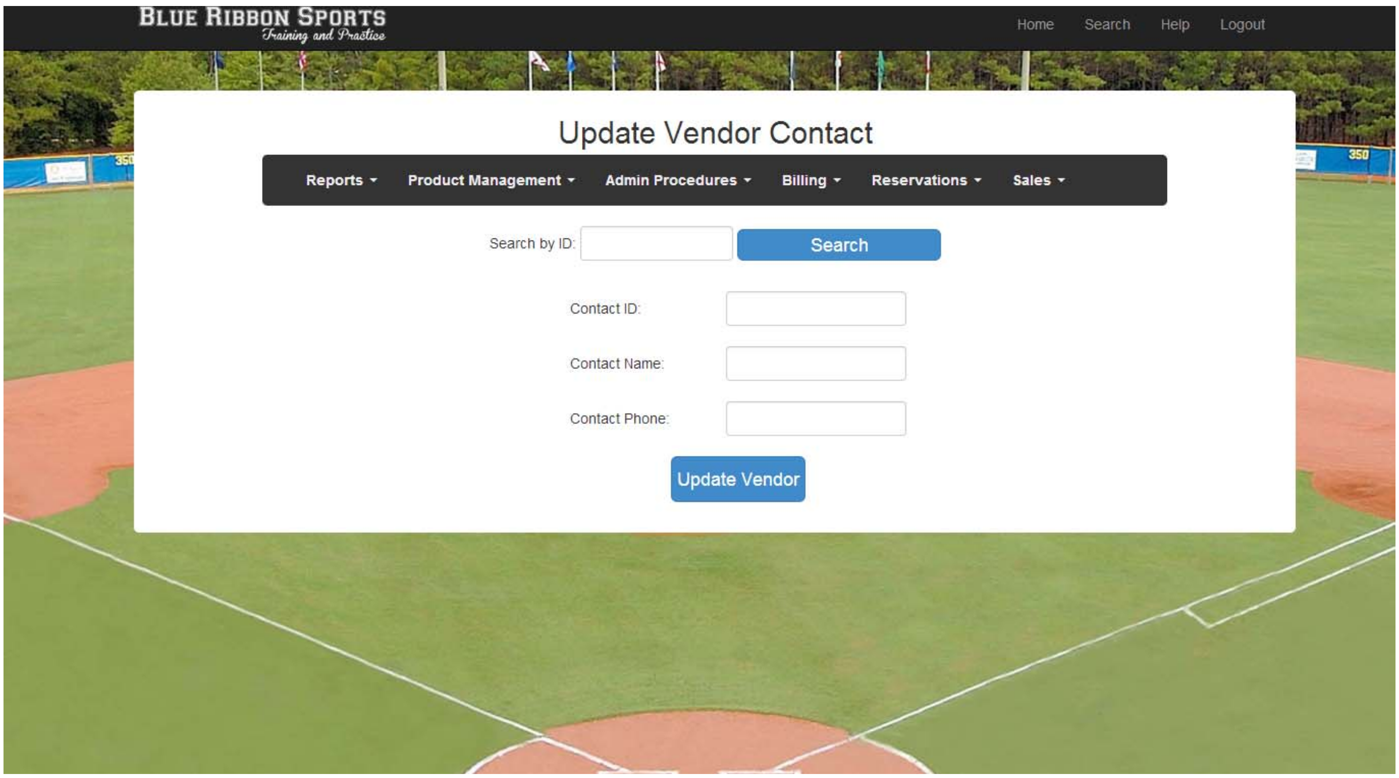
The View Vendor Contact screen displays the details for an individual Vendor Contact. The Vender Contact ID, Contact Name and Phone Number will be displayed for the selected Vendor Contact.



1. To search for a specific contact, enter the Contact ID in the Search by ID field and click Search. To browse forward and backward through contacts, click on the Next and Previous buttons.
2. If the details of a selected contact need to be updated, click on the Update button to be sent to the Update Vendor Contact screen (Page 88) for this contact.

Update Vendor Contact

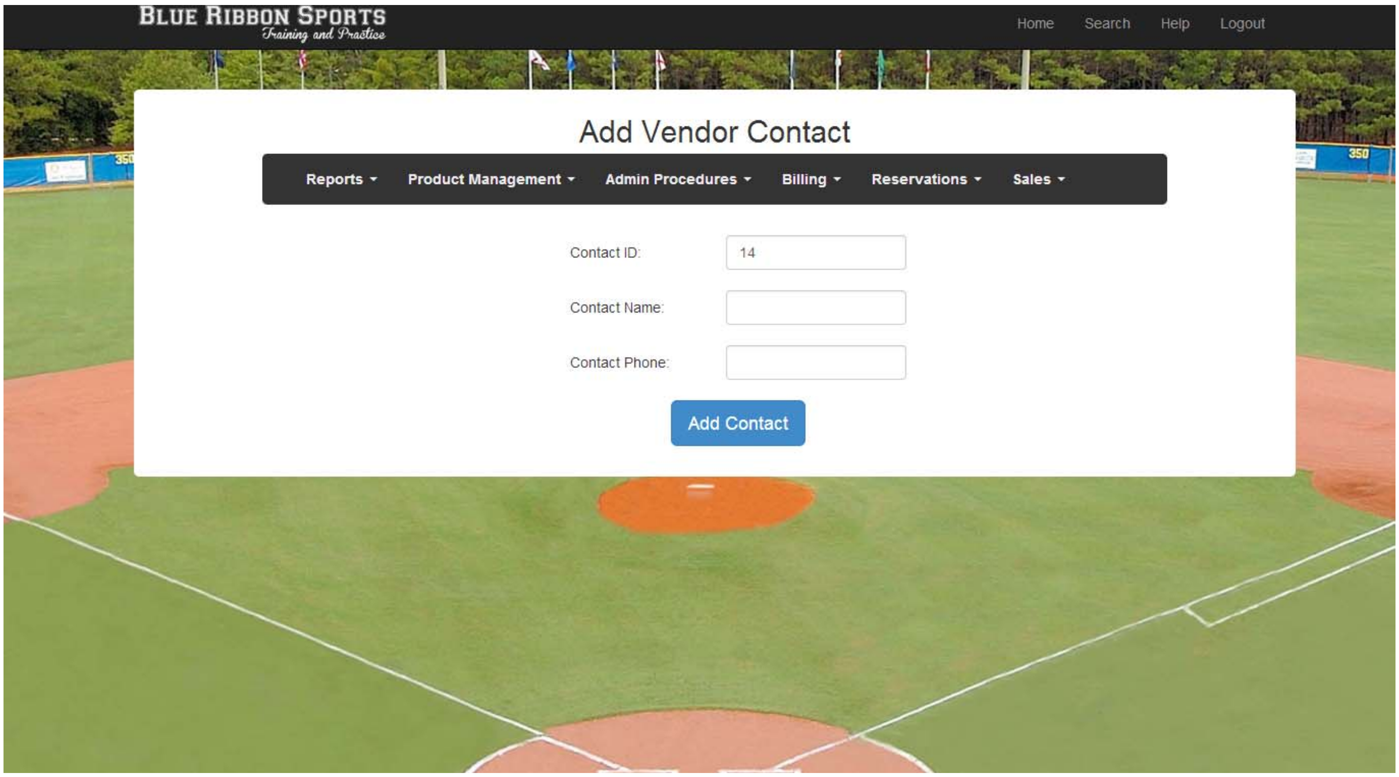
The View Vendor Contact screen displays the details for an individual Vendor Contact. The Vender Contact ID, Contact Name and Phone Number will be displayed for the selected Vendor Contact in an editable format.



1. To update an existing contact, enter the Contact ID in the “Search by ID” field and click “Search.”
2. The Contact’s existing information will be loaded into the form.
3. Perform any required updates and then click “Update Contact.”
4. If any required fields are left blank, you will be prompted to enter them before the “Update Contact” button will work.

Add Vendor Contact

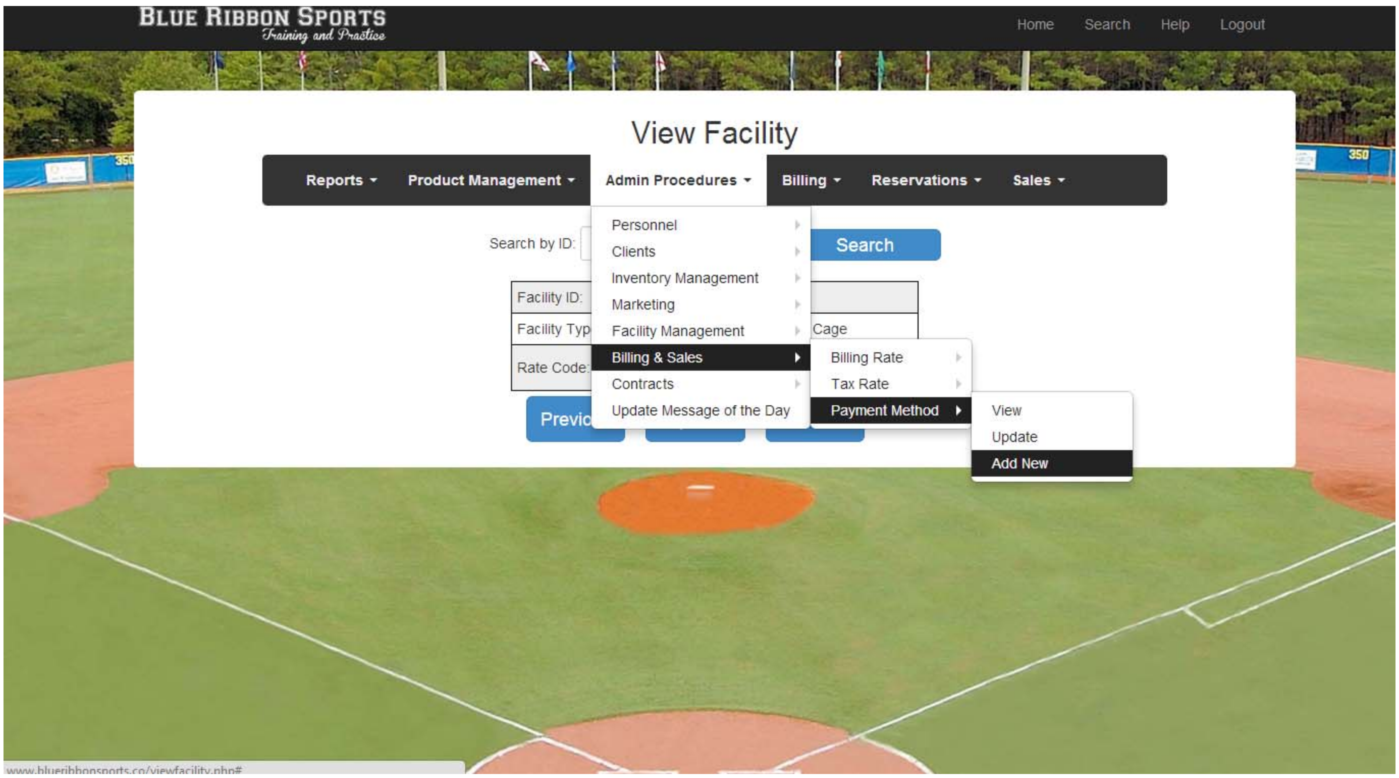
The Add Vendor Contact Screen allows for the entry of a new vendor contact into the system.



1. The next available Contact ID will be populated into the form. You must then enter the Contact Name and Contact Phone Number.
2. Once complete, click the “Add Contact” button to create the Contact.
3. If any required fields are left blank, you will be prompted to enter them before the Add Contact button will work.

Navigation – Admin Procedures

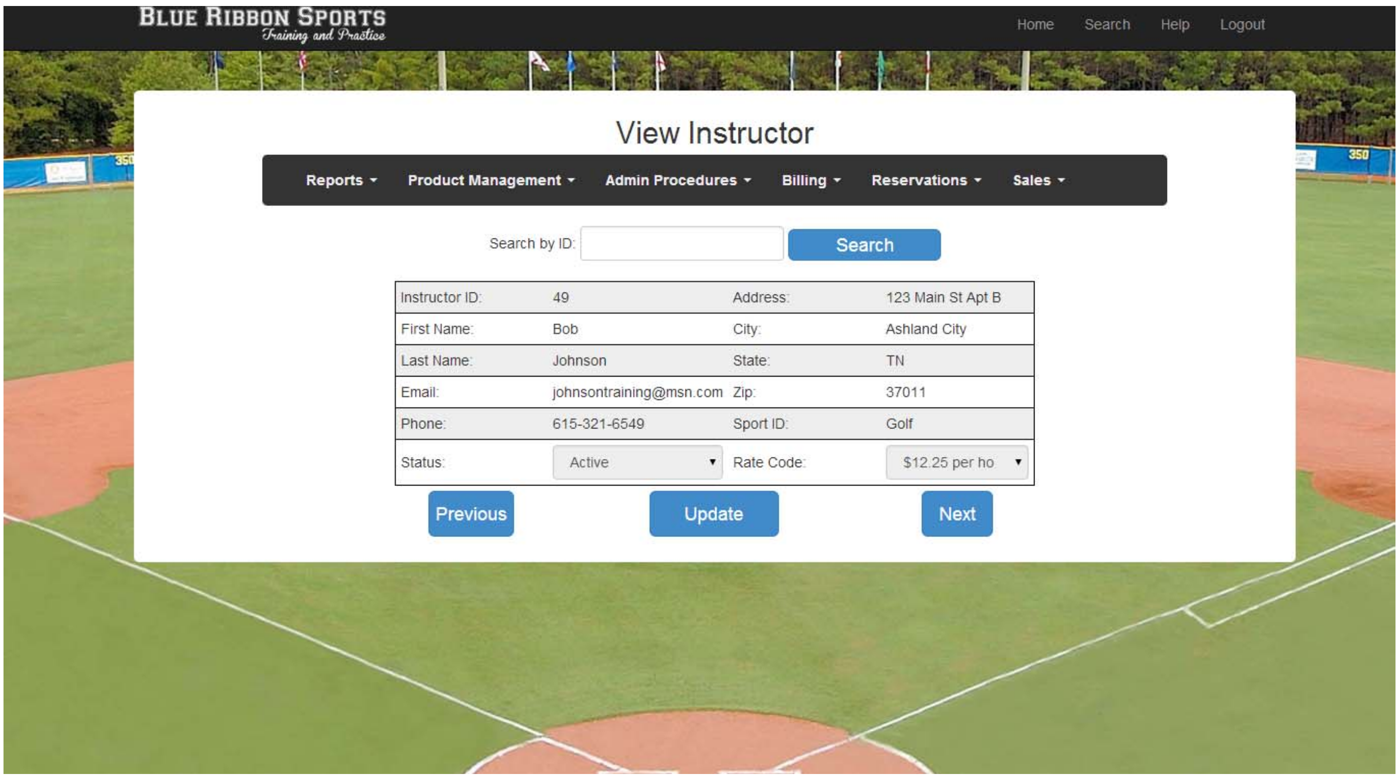
The Admin Procedures section of the navigation bar provides access to the administrative tasks handled by the system, such as personnel, clients, and contracts, separated into eight categories.



1. To access the Admin Procedures dropdown, click on Admin Procedures on the Navigation bar.
2. If a small gray triangle is listed to the right of the item in the dropdown, it contains further menu options. Hover over the category to see more options.
3. Click on the desired page to navigate to it.

View Instructor

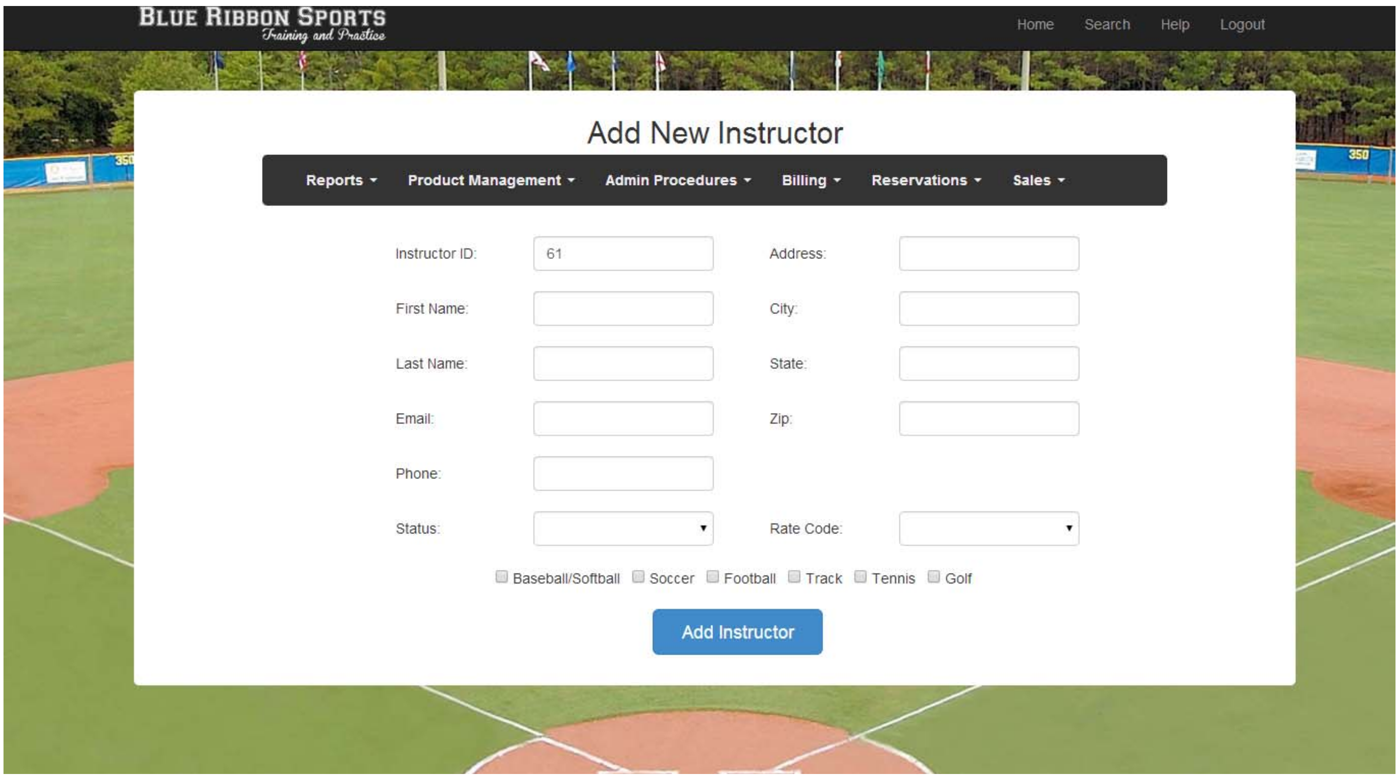
The View Instructor screen displays the Instructor ID, Full Name, Full Address, Email, Phone Number, Sport, Status and Rate Code for the selected instructor. From this screen you can navigate to update instructor if needed.



1. To search for a specific instructor, enter the Instructor ID in the Search by ID field and click Search. To browse forward and backward through instructors, click on the Next and Previous buttons.
2. If the details of a selected instructor need to be updated, click on the Update button to be sent to the Update Instructor screen (Page 93) for this instructor.

Add New Instructor

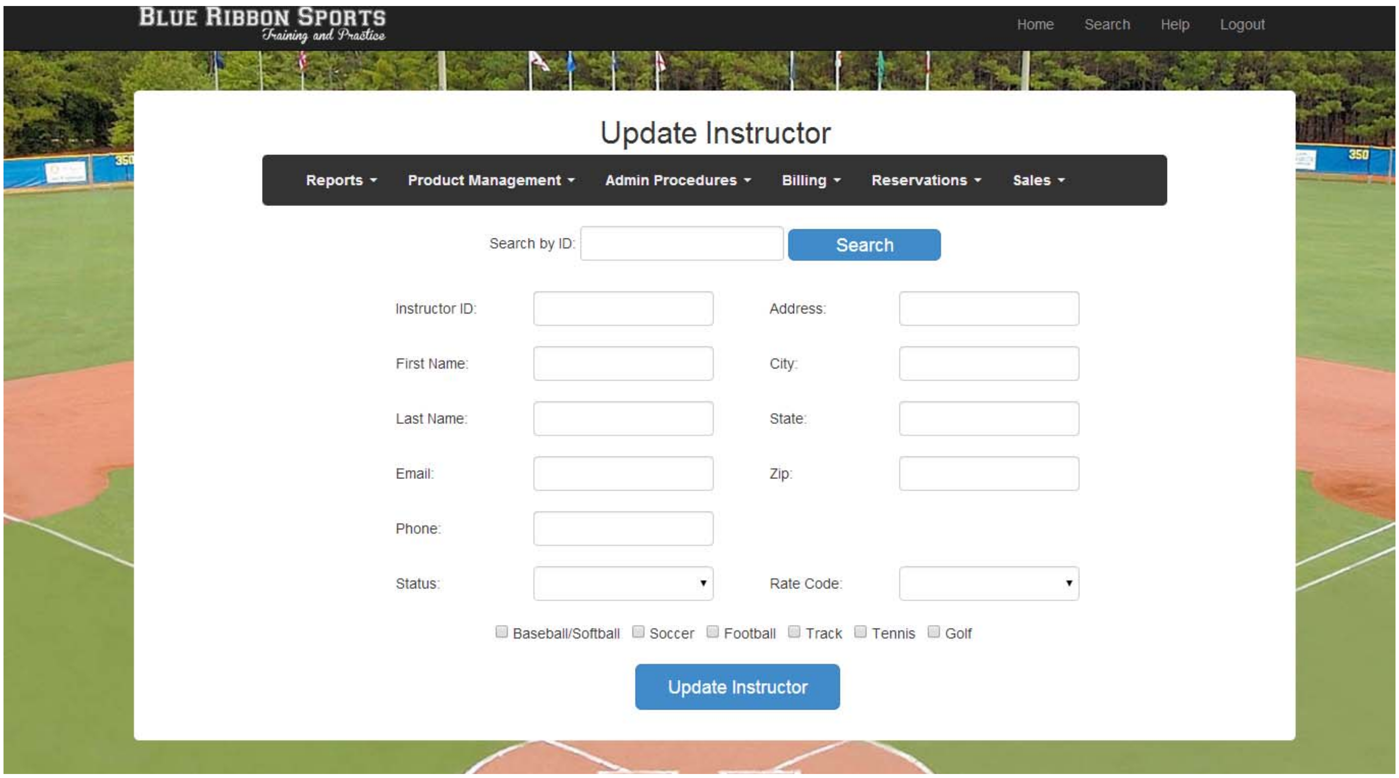
The Add New Instructor screen allow for the entry of a new Instructor into the system.



1. The next available Instructor ID will be populated into the form. You must then enter the First Name, Last Name, Email, Phone, Status, Street Address, City, State, Zip, and Rate Code. Checkboxes are provided for which sports an instructor accepts reservations for.
2. Once complete, click the “Add Instructor” button to create the instructor.
3. If any required fields are left blank, you will be prompted to enter them before the Add Instructor button will work.

Update Instructor

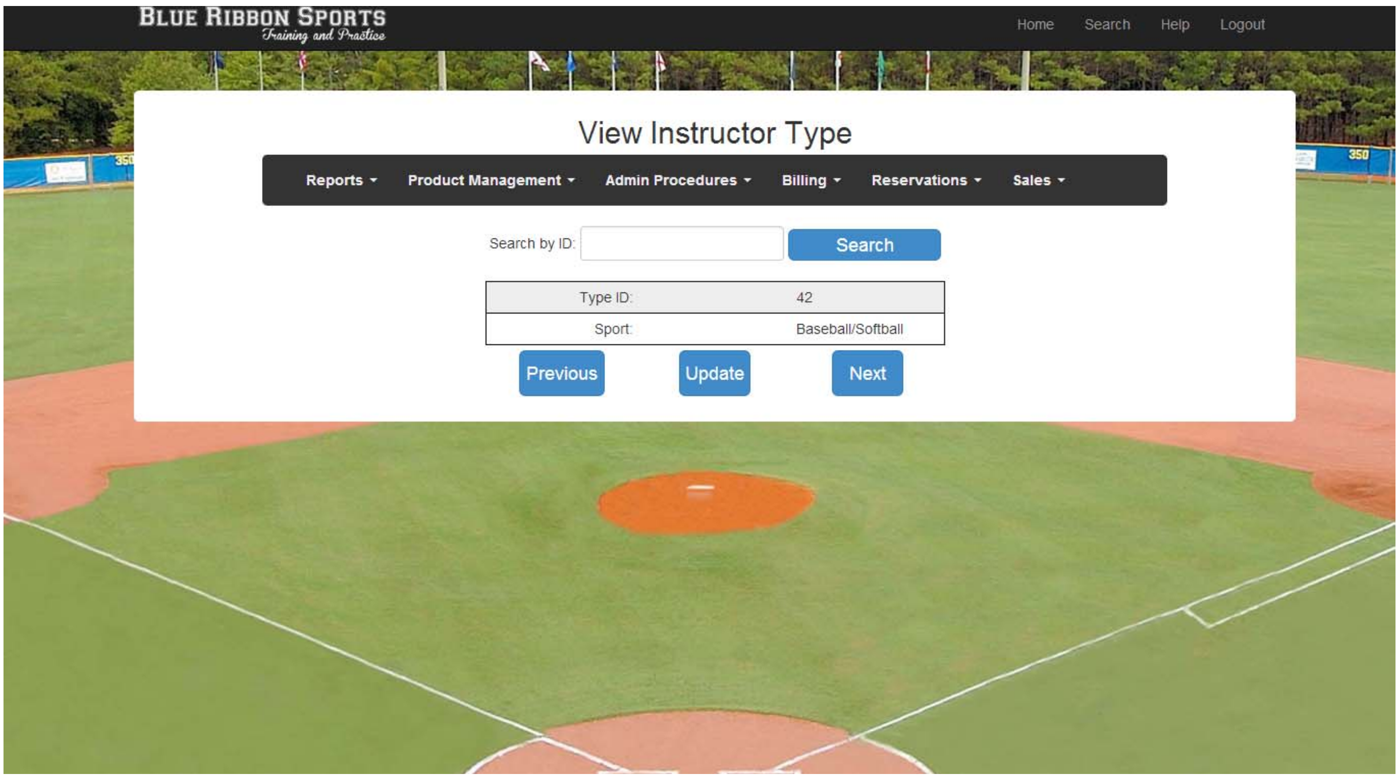
The Update Instructor screen displays the Instructor ID, Full Name, Full Address, Email, Phone Number, Sport, Status and Rate Code for the selected instructor in an editable format.



1. To update an existing instructor, enter the Instructor ID in the "Search by ID" field and click "Search."
2. The Instructor's existing information will be loaded into the form.
3. Perform any required updates and then click "Update Instructor."
4. If any required fields are left blank, you will be prompted to enter them before the "Update Instructor" button will work.

View Instructor Type

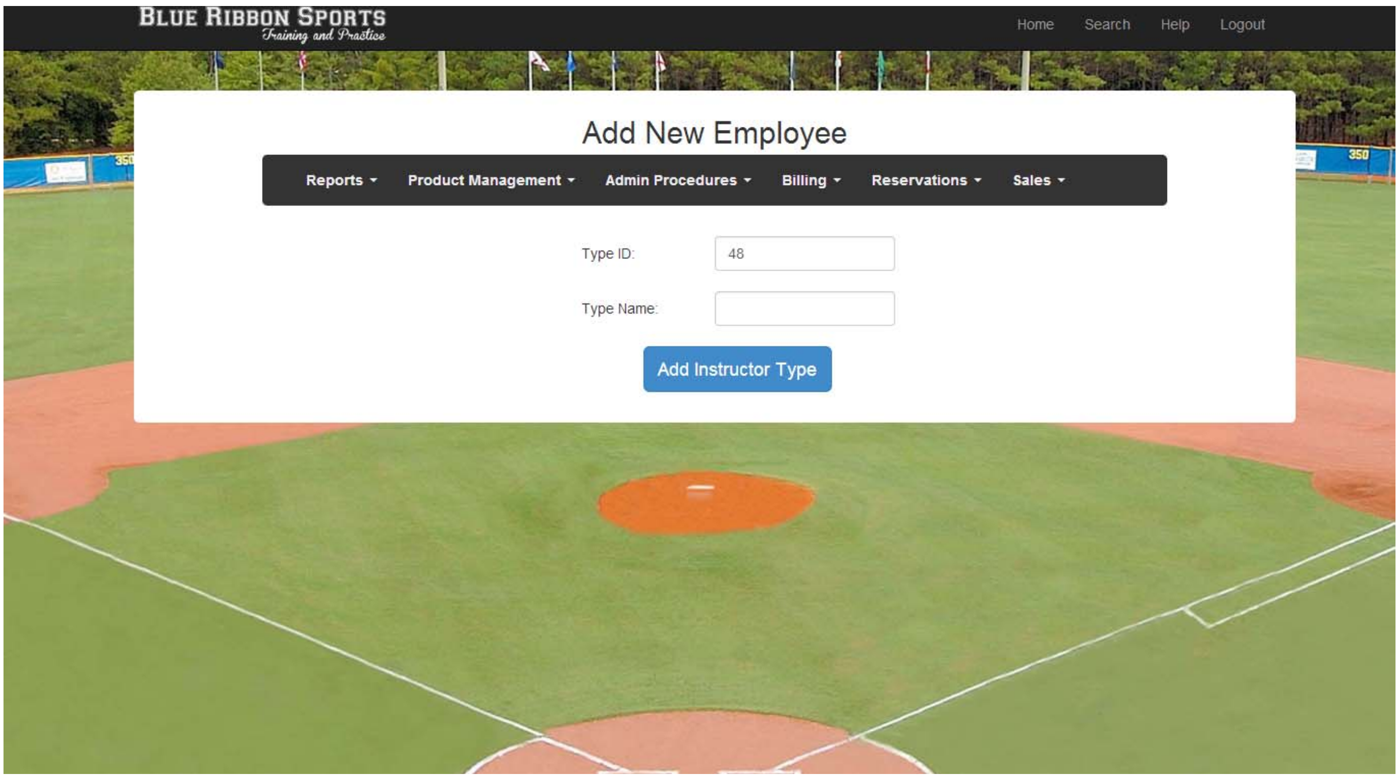
The View instructor Type displays the Type ID and Sport for the selected Instructor Type.



1. To search for a specific instructor type, enter the Type ID in the Search by ID field and click Search. To browse forward and backward through types, click on the Next and Previous buttons.
2. If the details of a selected type need to be updated, click on the Update button to be sent to the Update Instructor Type screen (Page 96) for this instructor.

Add Instructor Type

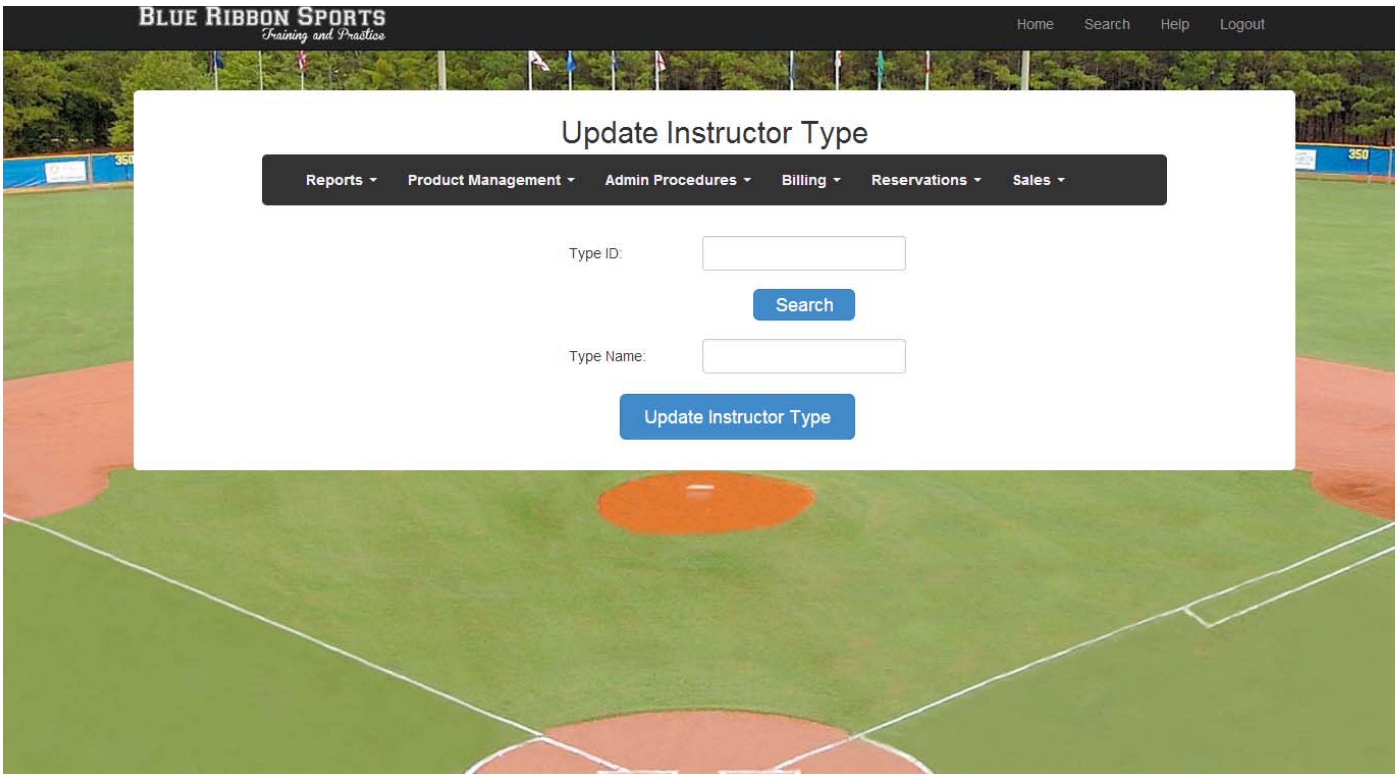
The Add Instructor Type Screen allows for the entry of a new instructor type into the system.



1. The next available Type ID will be populated into the form. You must then enter the name of the Instructor Type.
2. Once complete, click the “Add Instructor Type” button to create the type.
3. If any required fields are left blank, you will be prompted to enter them before the Add Instructor Type button will work.

Update Instructor Type

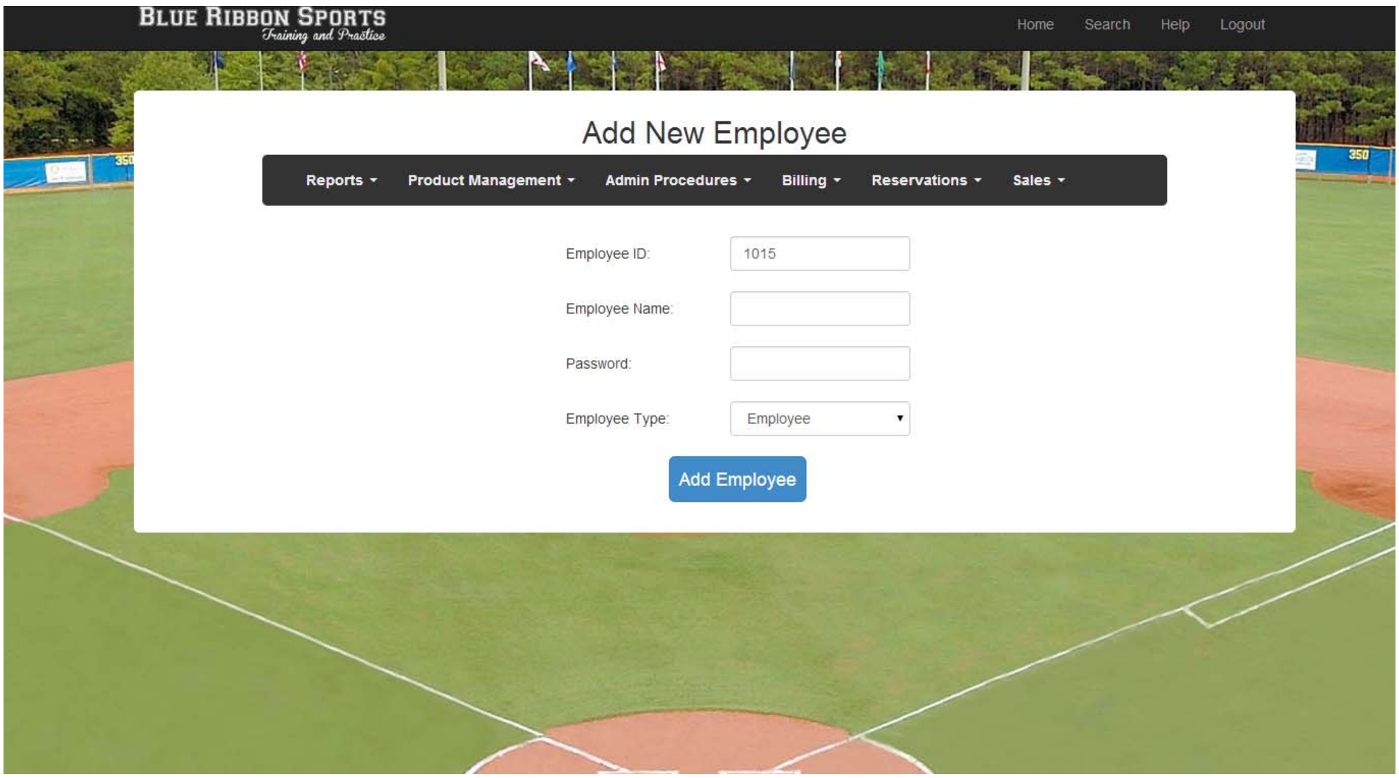
The Update Instructor Type displays the Type ID and Sport the selected Instructor Type in an editable format.



1. To update an existing instructor type, enter the Type ID in the “Search by ID” field and click “Search.”
2. The Type’s existing information will be loaded into the form.
3. Perform any required updates and then click “Update Instructor Type.”
4. If any required fields are left blank, you will be prompted to enter them before the “Update Instructor Type” button will work.

Add New Employee

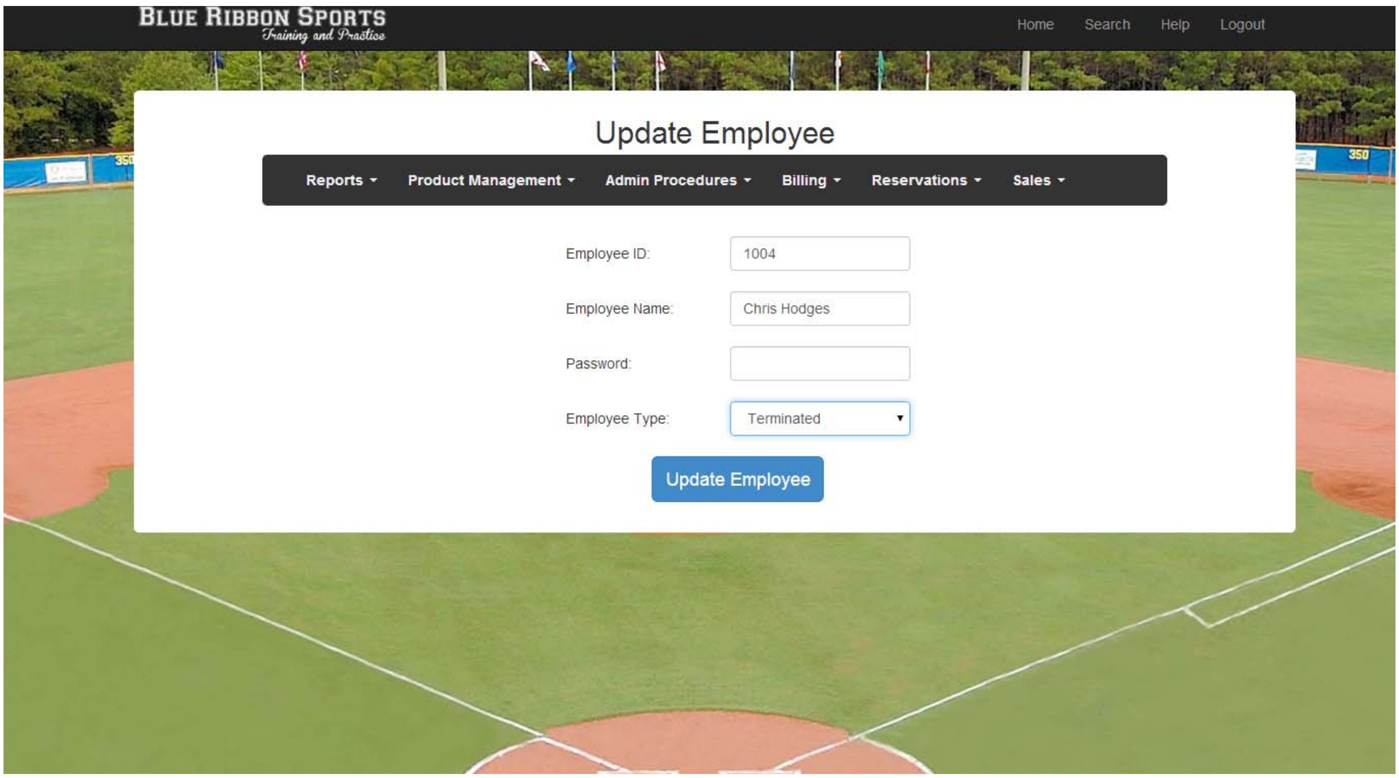
The Add New Employee screen allows for the entry of employee into the system.



1. The next available Employee ID will be populated into the form. You must then enter the Employee's Name and assign them a password and employee type.
2. Once complete, click the "Add Employee" button to create the employee.
3. If any required fields are left blank, you will be prompted to enter them before the Add Employee button will work.

Update Employee

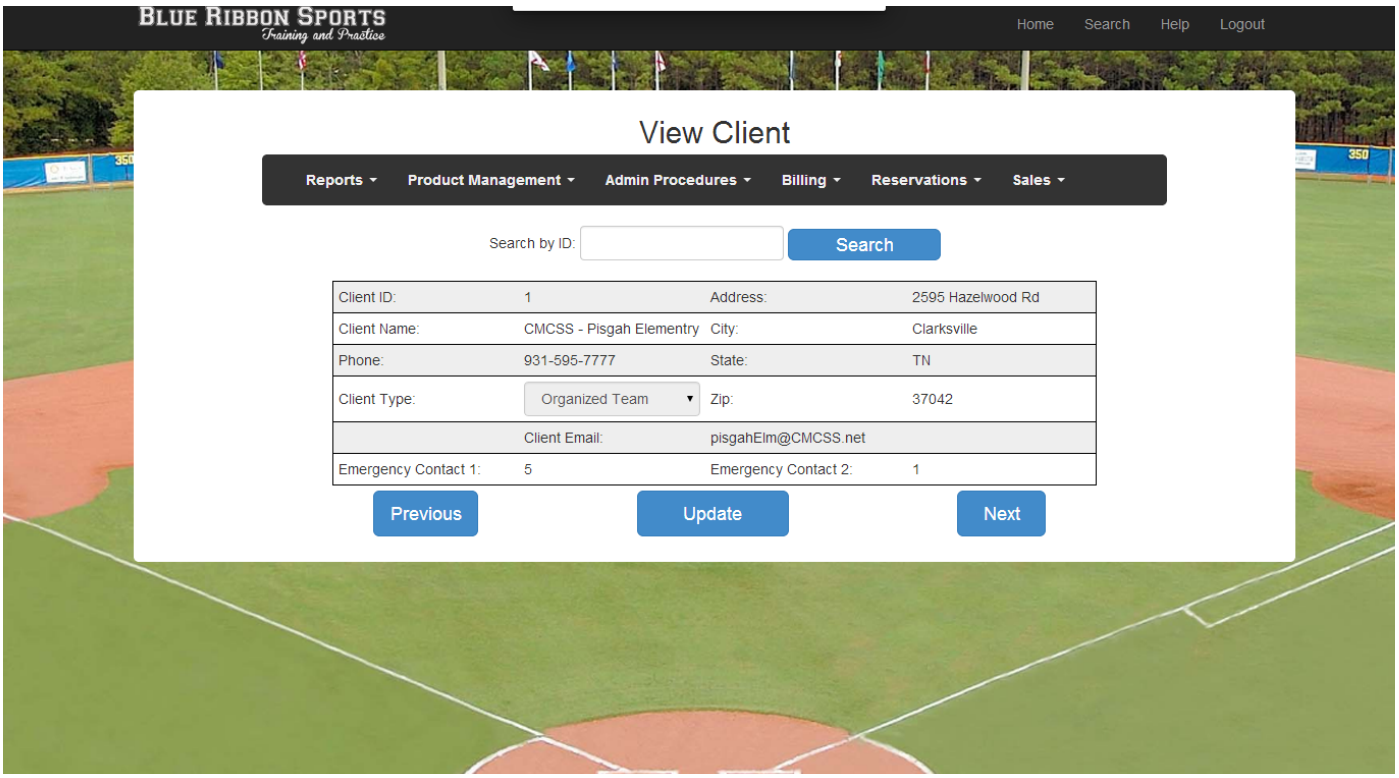
The Update Employee screen displays the Employee ID, Full Name, and empty Password field and Employee Type in an editable format. (The new password can be reset, but the existing password will not be viewable for security purposes)



1. Enter the existing Employee's ID and name, assign them a password and employee type.
2. Once the data has been entered, click "Update Employee."
3. If any required fields are left blank, you will be prompted to enter them before the "Update Employee" button will work.

View Client

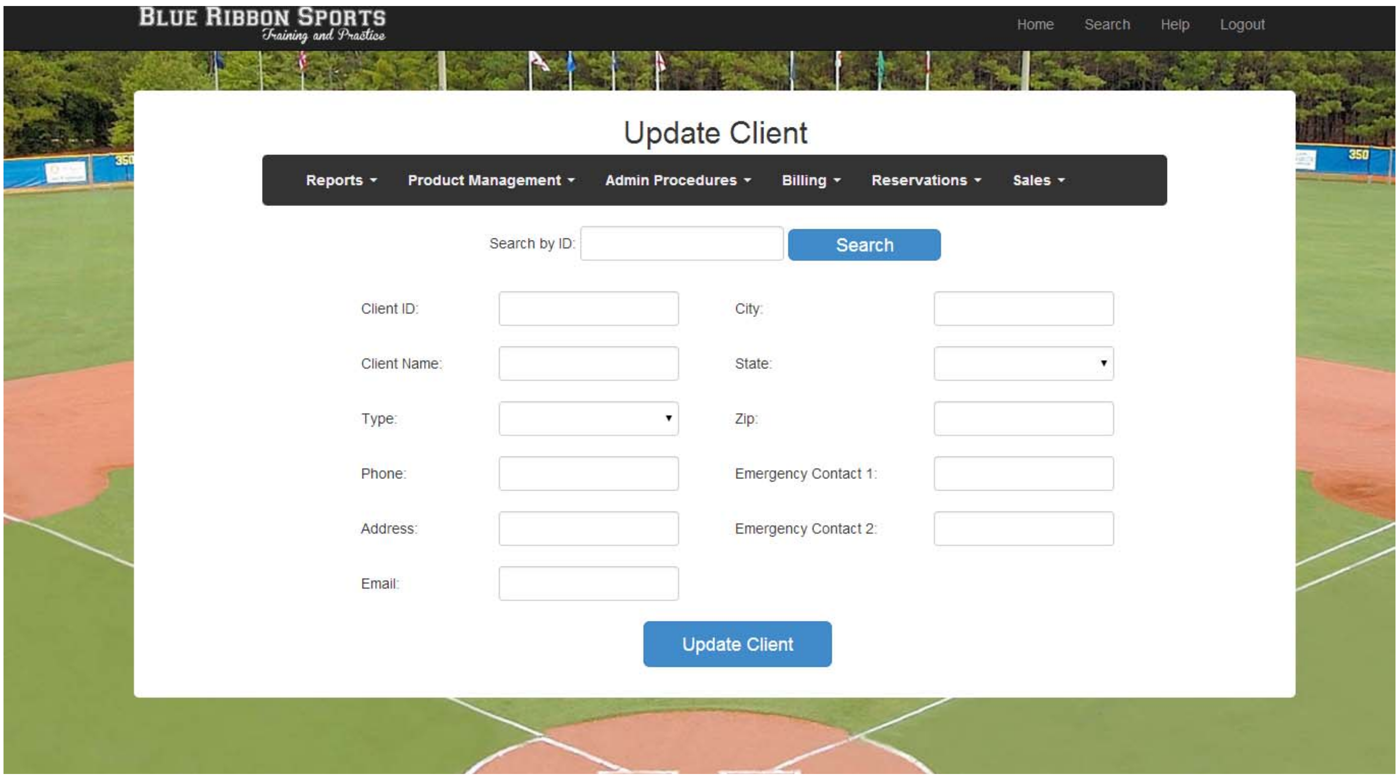
The View Client screen displays the Client ID, Client Type, Full Name, Full Address, Phone number, Email and Emergency Contact ID for the selected Client.



1. To search for a specific Client, enter the Client ID in the Search by ID field and click Search. To browse forward and backward through clients, click on the Next and Previous buttons.
2. If the details of a selected client need to be updated, click on the Update button to be sent to the Update Client screen (Page 100) for this client.

Update Client

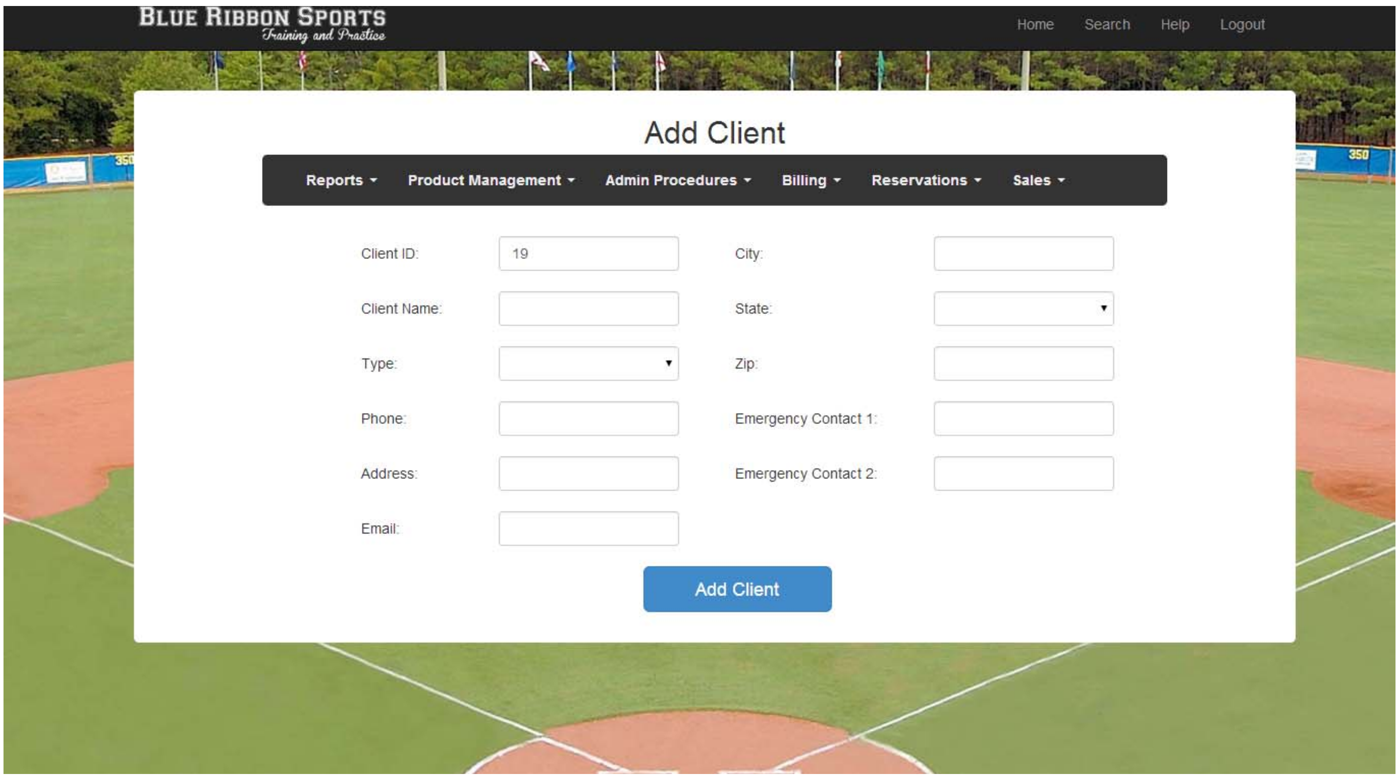
The Update Client screen displays the Client ID, Full Name, Full Address, Phone number, Email, Client Type, and Emergency Contact ID for the selected Client, in an editable format.



1. To update an existing client, enter the Type ID in the “Search by ID” field and click “Search.”
2. The Client’s existing information will be loaded into the form.
3. Perform any required updates and then click “Update Client.”
4. If any required fields are left blank, you will be prompted to enter them before the “Update Client” button will work.

Add New Client

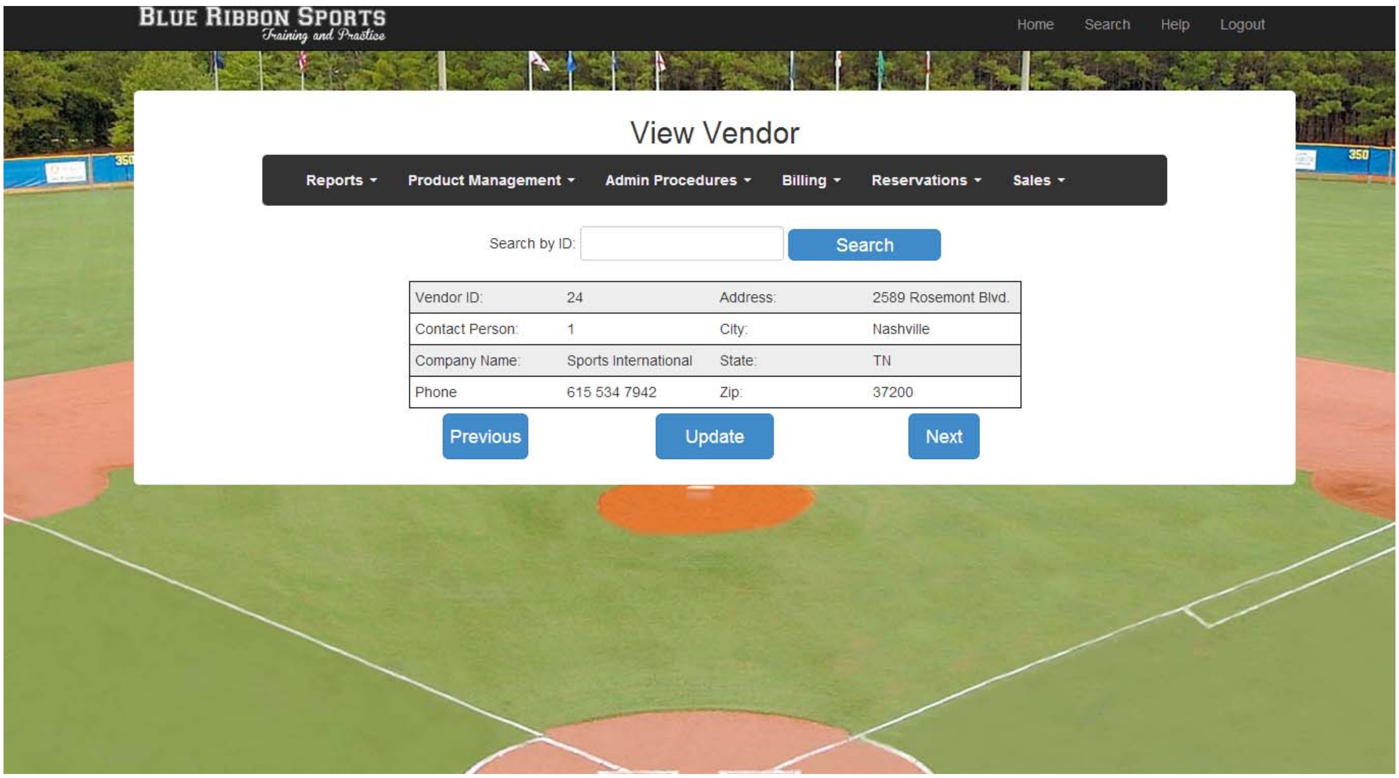
The Add New Client screen allows for the entry of a new client into the system.



1. The next available Client ID will be populated into the form. You must then enter the Client's Name, Type, Phone, Email, Street Address, City, State, Zip, and at least one Emergency Contact.
2. Once complete, click the "Add Client" button to create the client.
3. If any required fields are left blank, you will be prompted to enter them before the Add Client button will work.

View Vendor

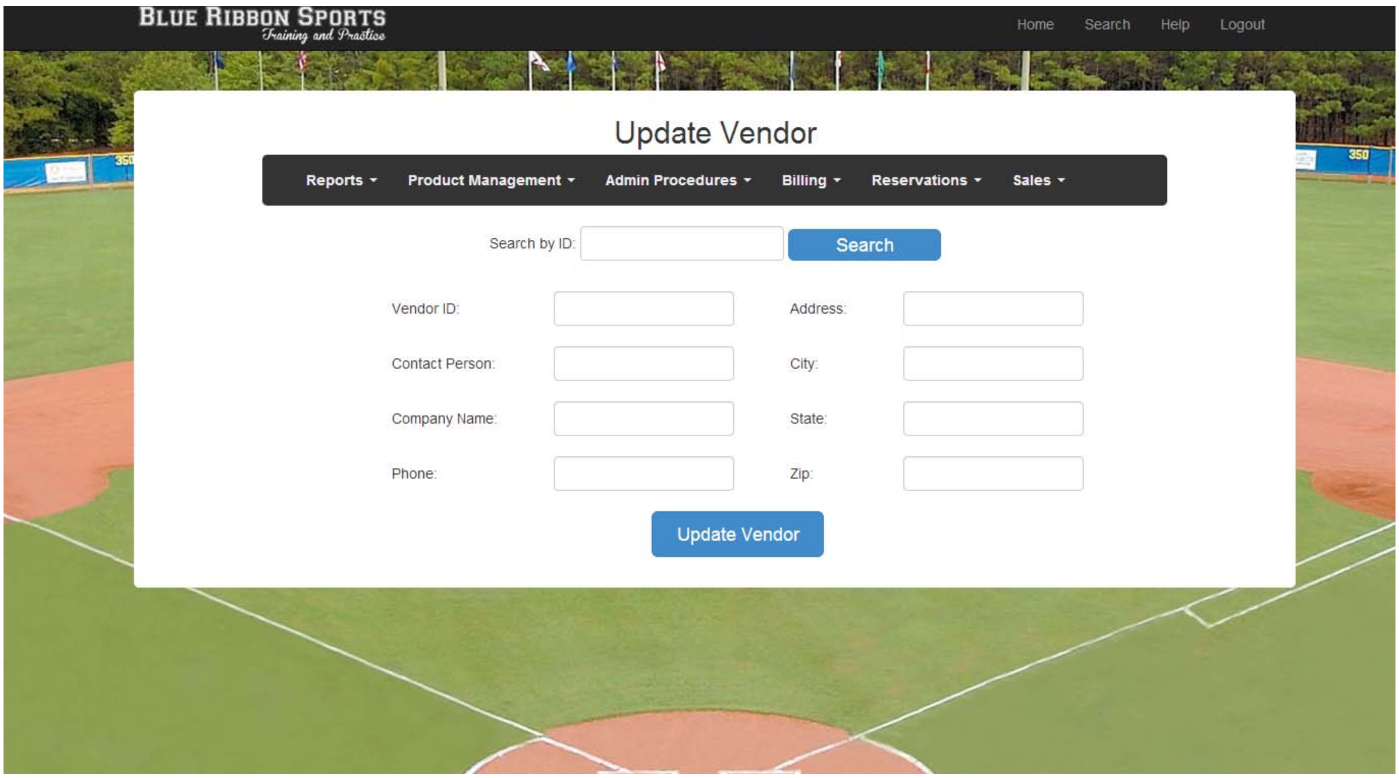
The View Vendor screen displays details for any individual Vendor. The Vendor ID, Full Address, Contact Person ID, Company Name and Phone Number will be displayed for the selected



1. To search for a specific vendor, enter the Vendor ID in the Search by ID field and click Search. To browse forward and backward through vendors, click on the Next and Previous buttons.
2. If the details of a selected vendor need to be updated, click on the Update button to be sent to the Update Vendor screen (Page 103) for this vendor.

Update Vendor

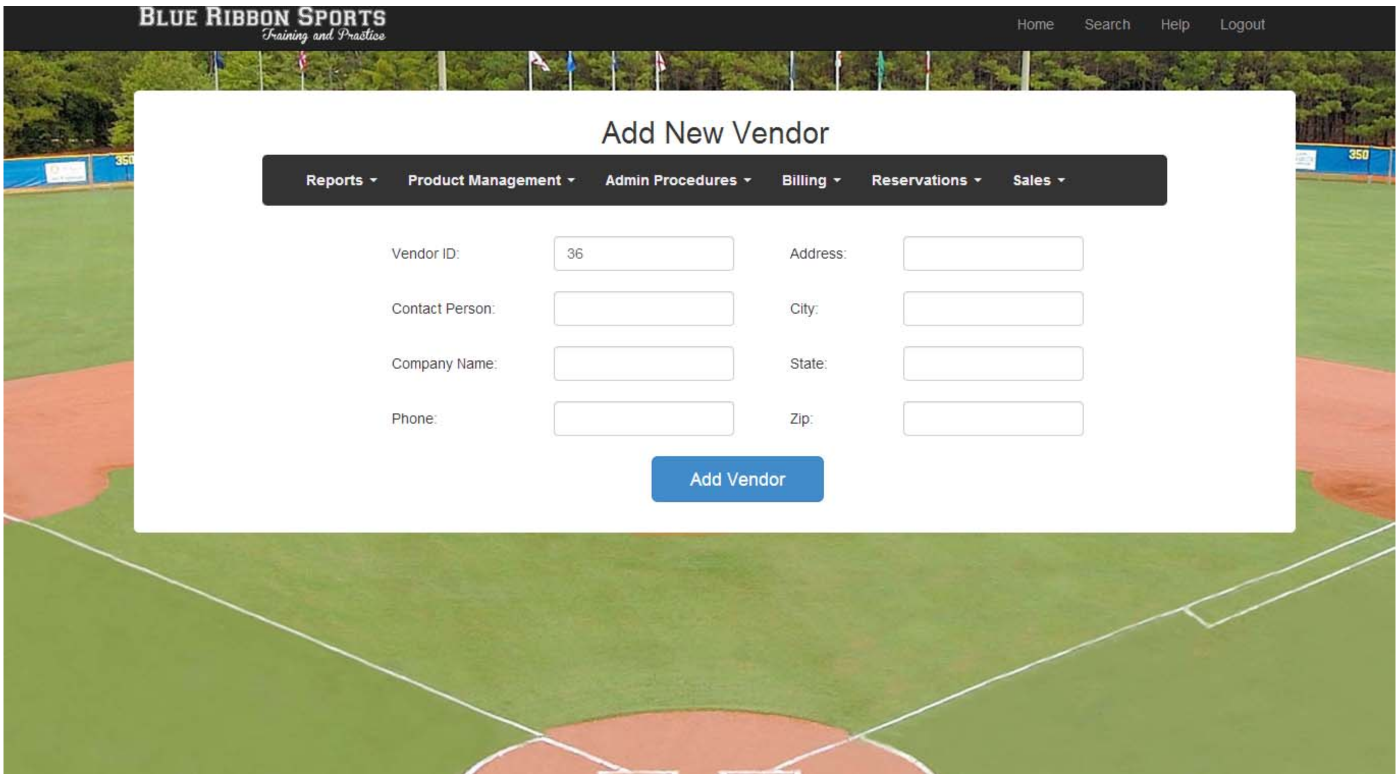
The Update Vendor screen displays details for any individual Vendor. The Vendor ID, Full Address, Contact Person ID, Company Name and Phone Number will be displayed for the selected Vendor in an editable format.



1. To update an existing vendor, enter the Vendor ID in the "Search by ID" field and click "Search."
2. The Vendor's existing information will be loaded into the form.
3. Perform any required updates and then click "Update Vendor."
4. If any required fields are left blank, you will be prompted to enter them before the "Update Vendor" button will work.

Add New Vendor

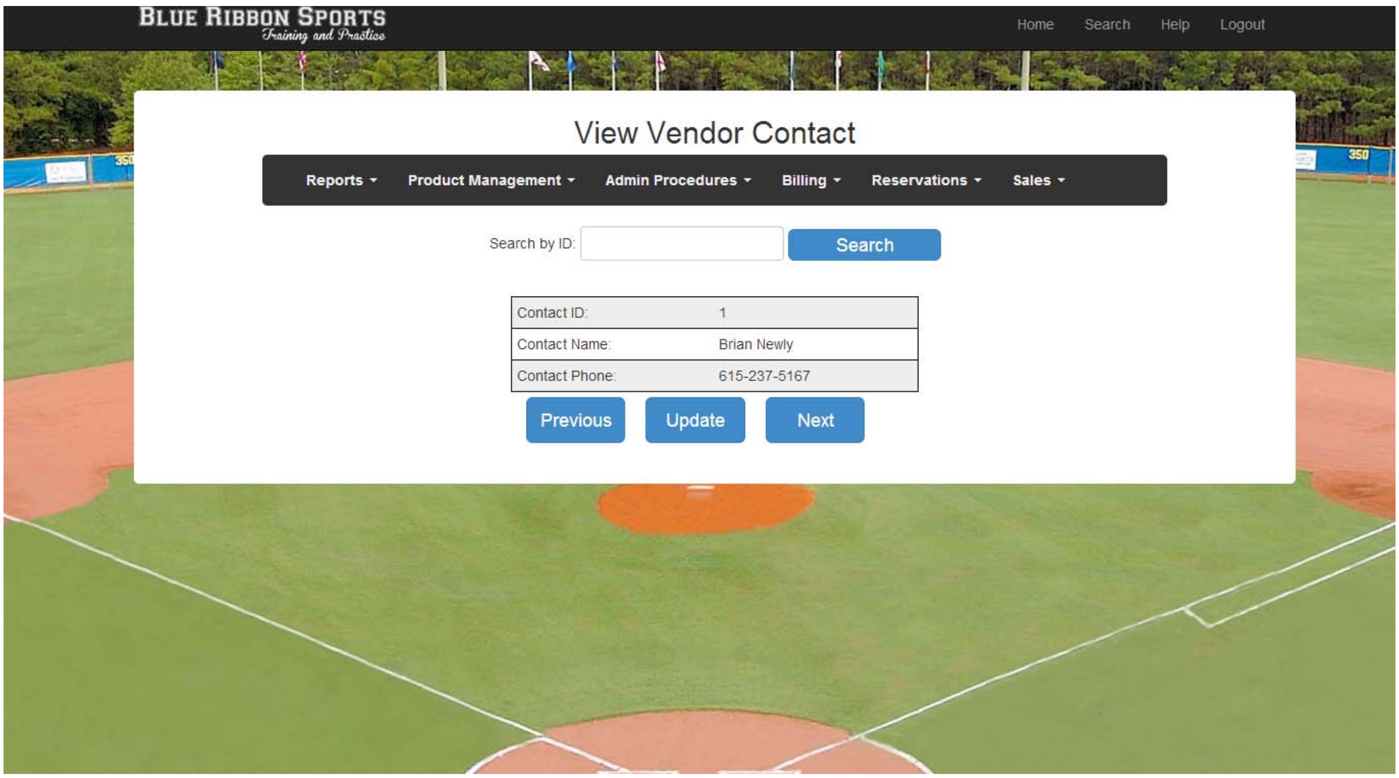
The Add New Vendor screen allows for the entry of a new Vendor into the system.



1. The next available Vendor ID will be populated into the form. You must then enter the Contact Person's ID, Company Name, Phone Number, Street Address, City, State, and Zip.
2. If the Contact Person for this vendor does not exist yet, go to the Add Vendor Contact screen (Page 107).
3. Once complete, click the "Add Vendor" button to create the Vendor.
4. If any required fields are left blank, you will be prompted to enter them before the Add Vendor button will work.

View Vendor Contact

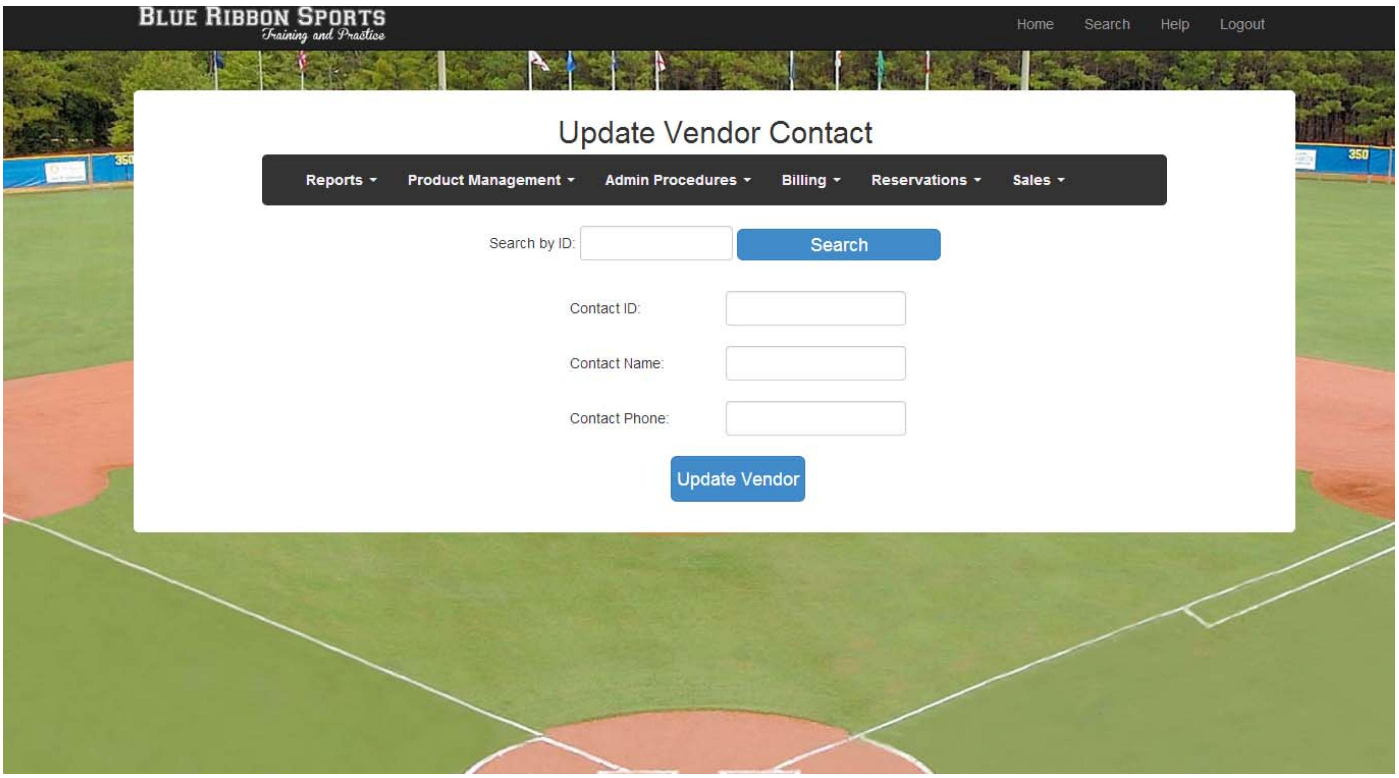
The View Vendor Contact screen displays the details for an individual Vendor Contact. The Vender Contact ID, Contact Name and Phone Number will be displayed for the selected Vendor Contact.



1. To search for a specific contact, enter the Contact ID in the Search by ID field and click Search. To browse forward and backward through contacts, click on the Next and Previous buttons.
2. If the details of a selected contact need to be updated, click on the Update button to be sent to the Update Vendor Contact screen (Page 106) for this contact.

Update Vendor Contact

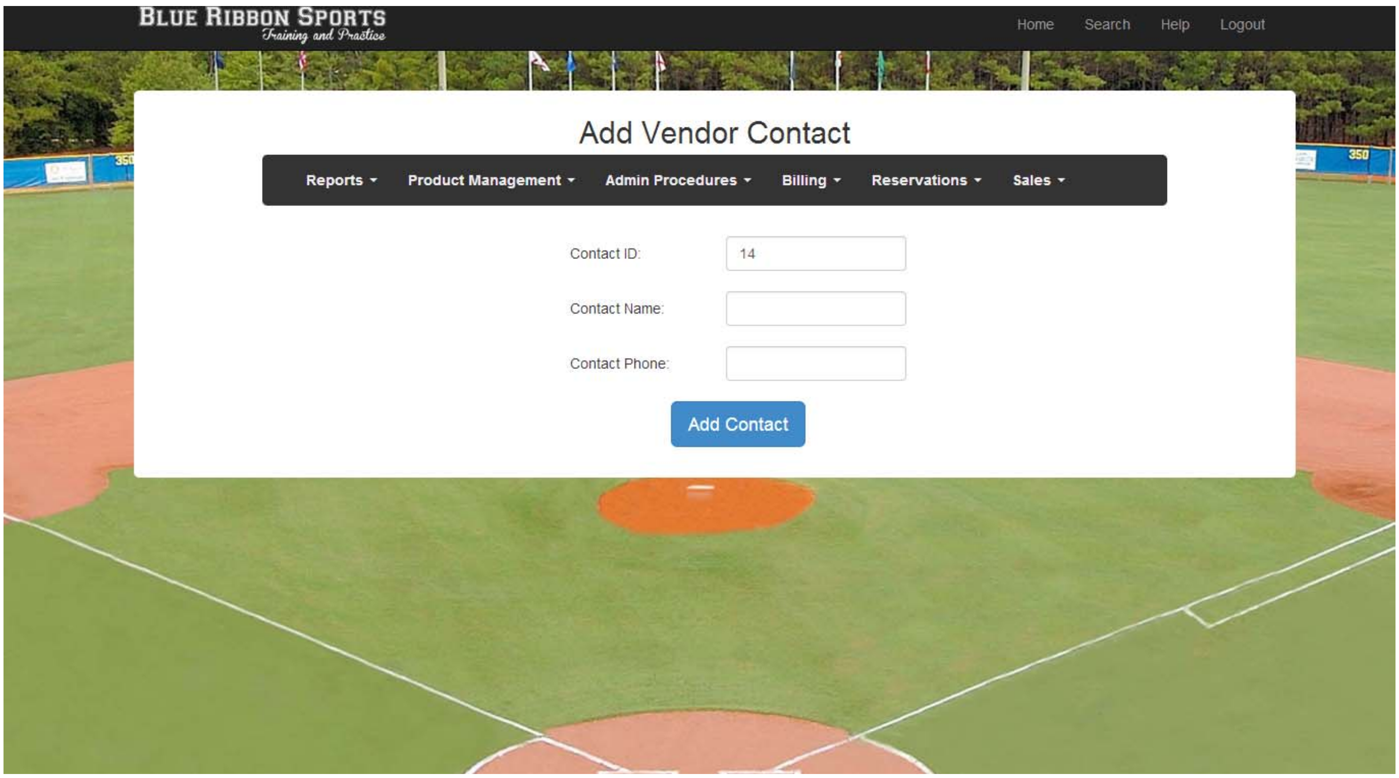
The View Vendor Contact screen displays the details for an individual Vendor Contact. The Vender Contact ID, Contact Name and Phone Number will be displayed for the selected Vendor Contact in an editable format.



1. To update an existing contact, enter the Contact ID in the “Search by ID” field and click “Search.”
2. The Contact’s existing information will be loaded into the form.
3. Perform any required updates and then click “Update Contact.”
4. If any required fields are left blank, you will be prompted to enter them before the “Update Contact” button will work.

Add Vendor Contact

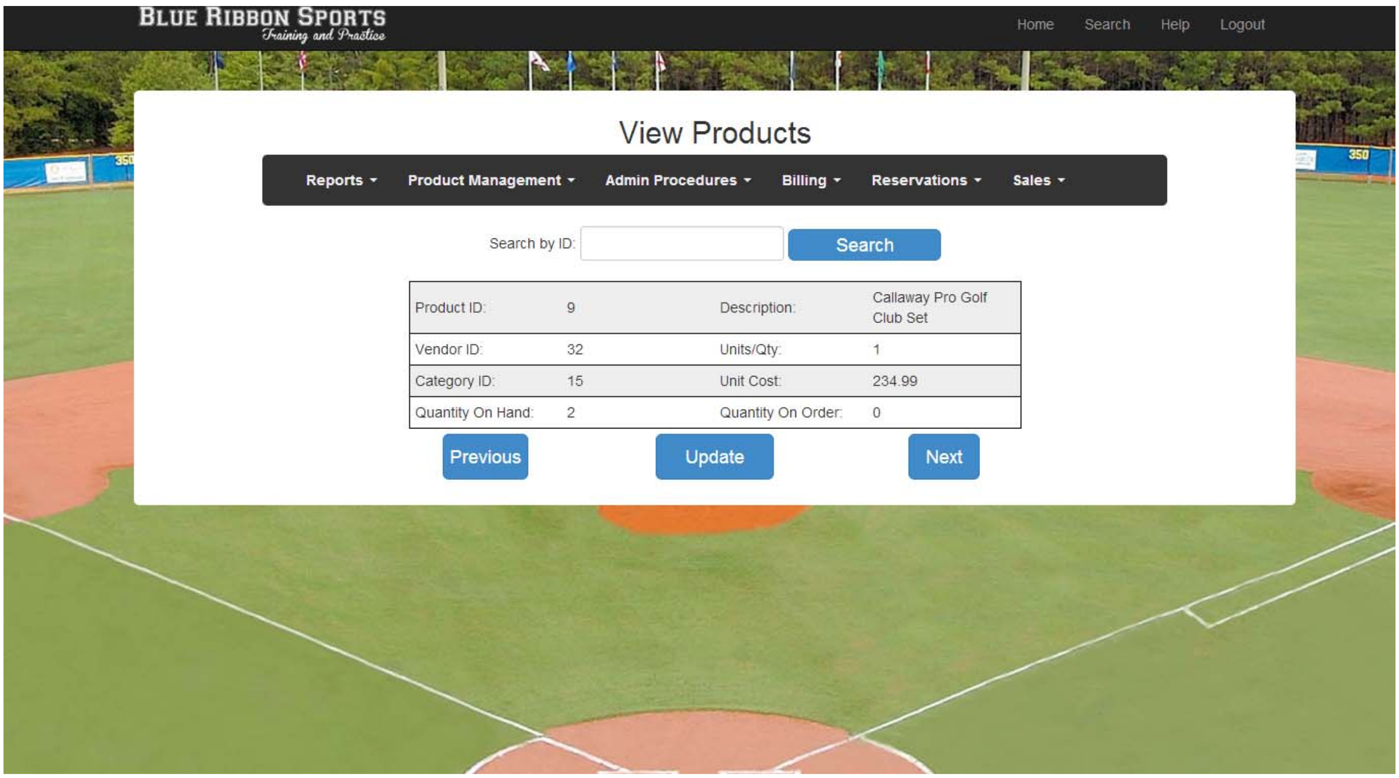
The Add Vendor Contact Screen allows for the entry of a new vendor contact into the system.



1. The next available Contact ID will be populated into the form. You must then enter the Contact Name and Contact Phone Number.
2. Once complete, click the “Add Contact” button to create the Contact.
3. If any required fields are left blank, you will be prompted to enter them before the Add Contact button will work.

View Products

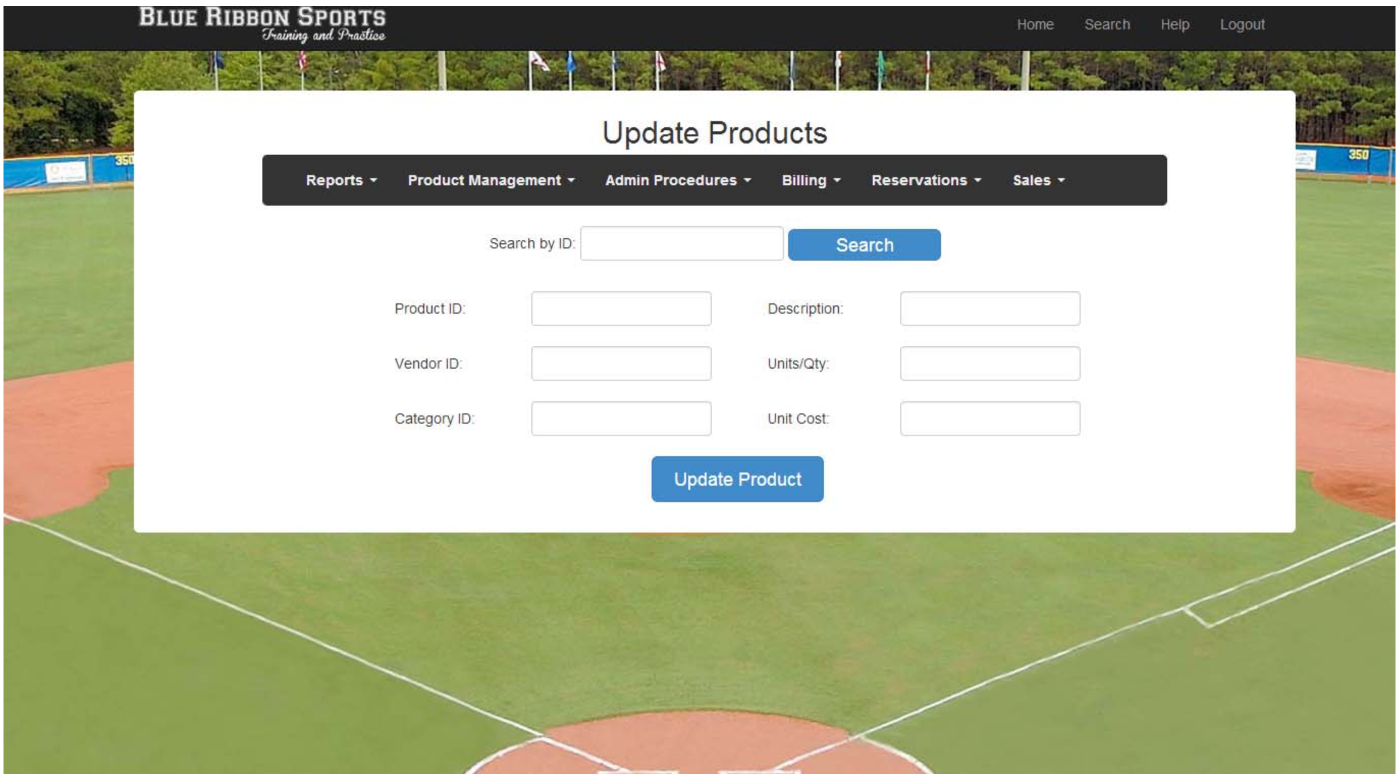
The View Products screen displays details pertaining to a specific product. The Product ID, Product Description, Vendor ID, Units/Quantity, Category ID, Unit Cost, Quantity on Hand and Quantity on Order will be displayed for the selected product.



1. To search for a specific product, enter the Product ID in the Search by ID field and click Search. To browse forward and backward through products, click on the Next and Previous buttons.
2. If the details of a selected product need to be updated, click on the Update button to be sent to the Update Product screen (Page 109) for this Product.

Update Product

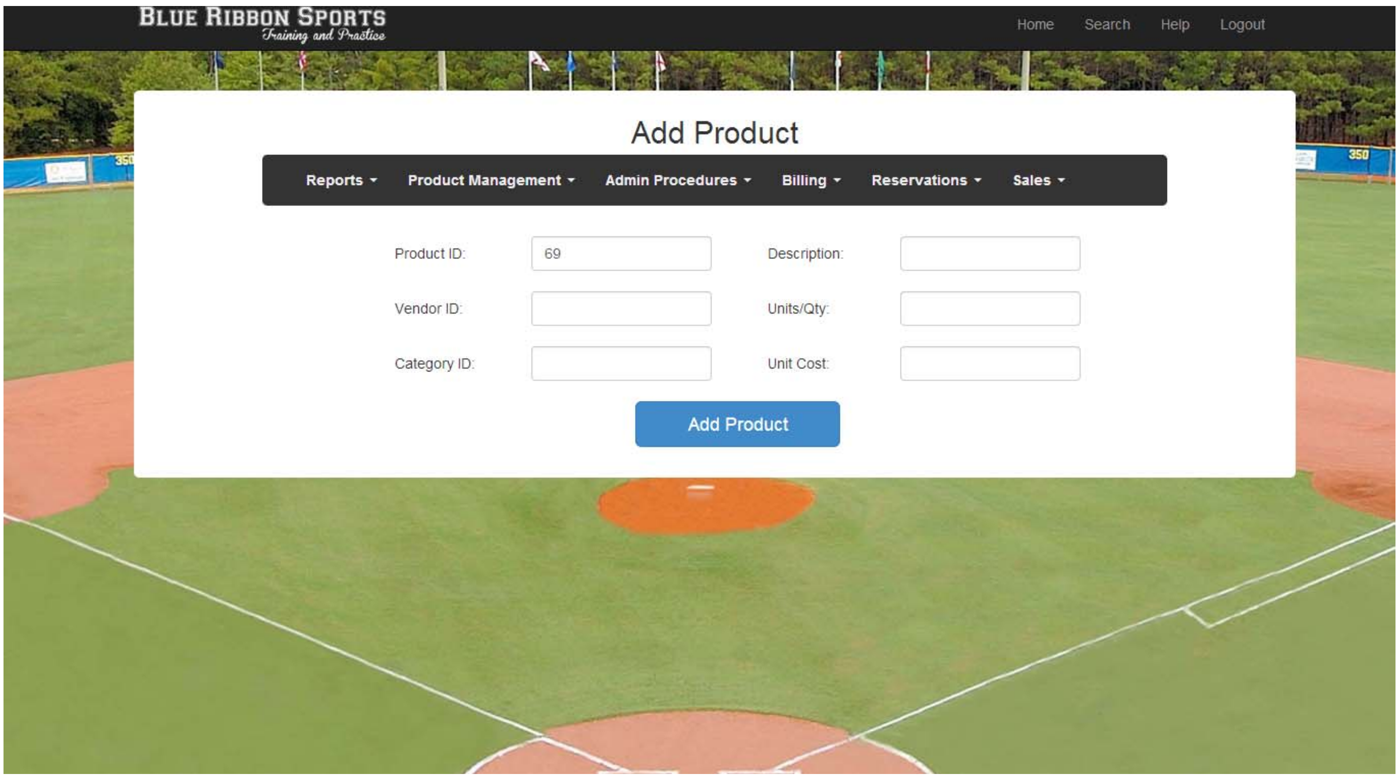
The Update Products screen displays details pertaining to a specific product. The Product ID, Product Description, Vendor ID, Units/Quantity, Category ID, Unit Cost, Quantity on Hand and Quantity on Order will be displayed for the selected product in an editable format.



1. To update an existing product, enter the Product ID in the "Search by ID" field and click "Search."
2. The Product's existing information will be loaded into the form.
3. Perform any required updates and then click "Update Product."
4. If any required fields are left blank, you will be prompted to enter them before the "Update Product" button will work.

Add Product

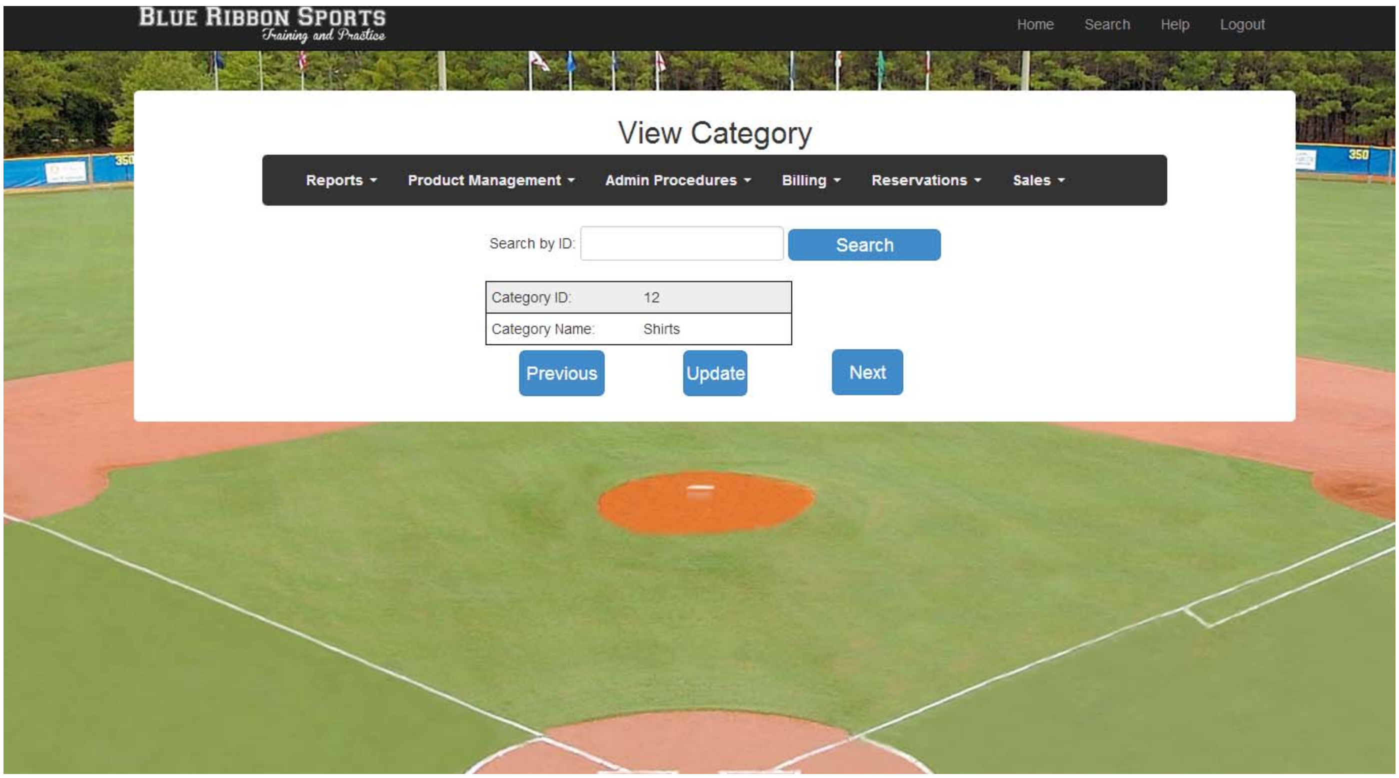
The Add Product screen allows for the entry of a new product into the system.



1. The next available Product ID will be populated into the form. You must then enter the Vendor ID, Category ID, Description, Units/Qty, and Unit Cost.
2. Once complete, click the “Add Product” button to create the new Product.
3. If any required fields are left blank, you will be prompted to enter them before the Add Product button will work.

View Category

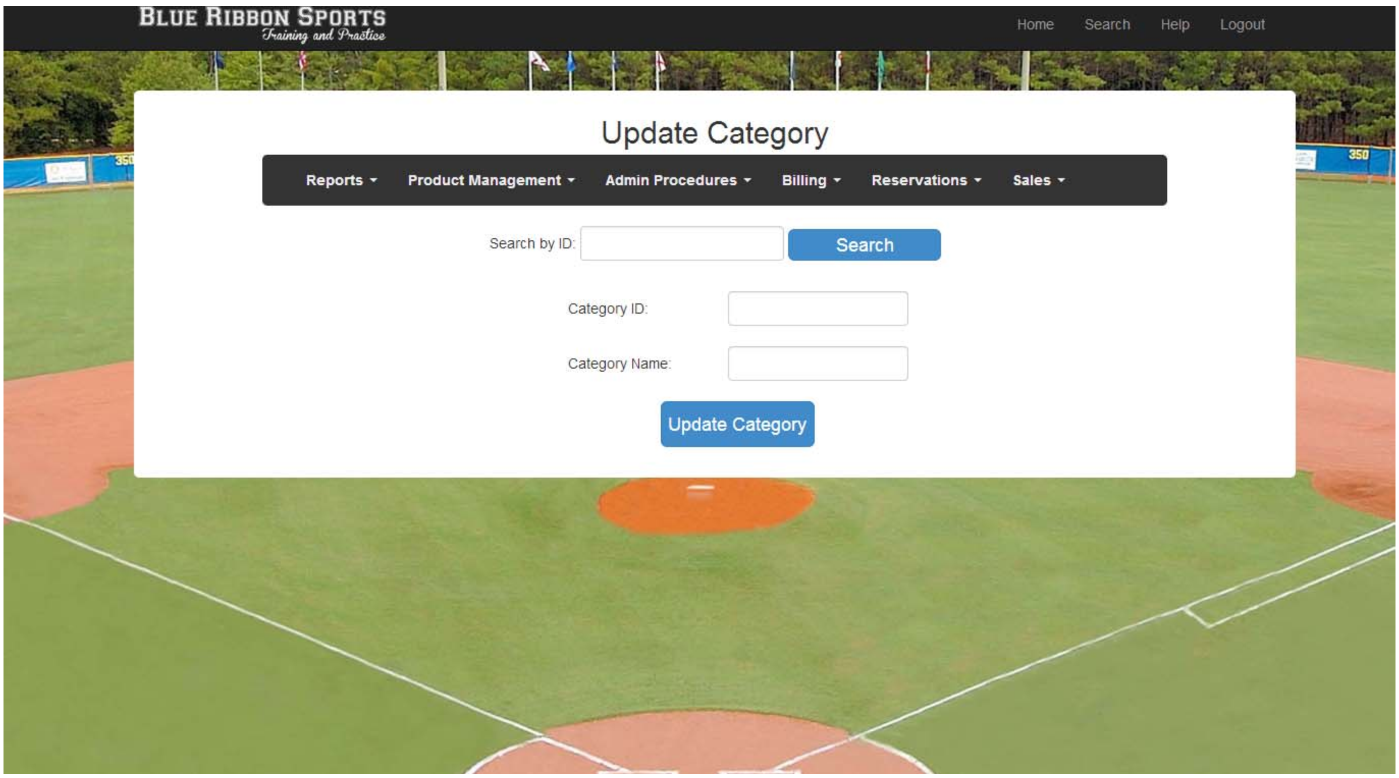
The View Categories screen displays the Category ID and Category Description for the selected category type.



1. To search for a specific Category, enter the Category ID in the Search by ID field and click Search. To browse forward and backward through categories, click on the Next and Previous buttons.
2. If the details of a selected Category need to be updated, click on the Update button to be sent to the Update Category screen (Page 112) for this Category.

Update Category

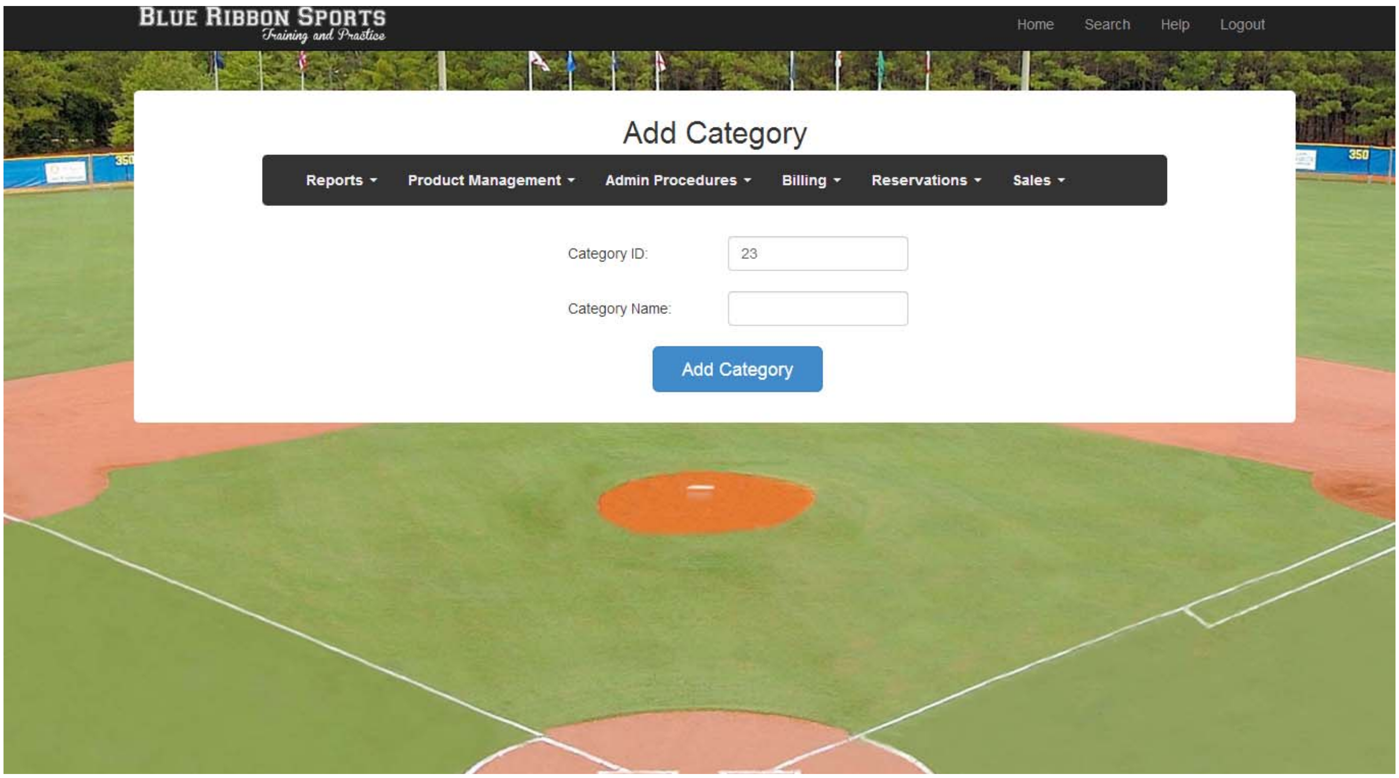
The Update Categories screen displays the Category ID and Category Description for the selected category type in an editable format.



1. To update an existing Category, enter the Category ID in the “Search by ID” field and click “Search.”
2. The Category’s existing information will be loaded into the form.
3. Perform any required updates and then click “Update Category.”
4. If any required fields are left blank, you will be prompted to enter them before the “Update Category” button will work.

Add Category

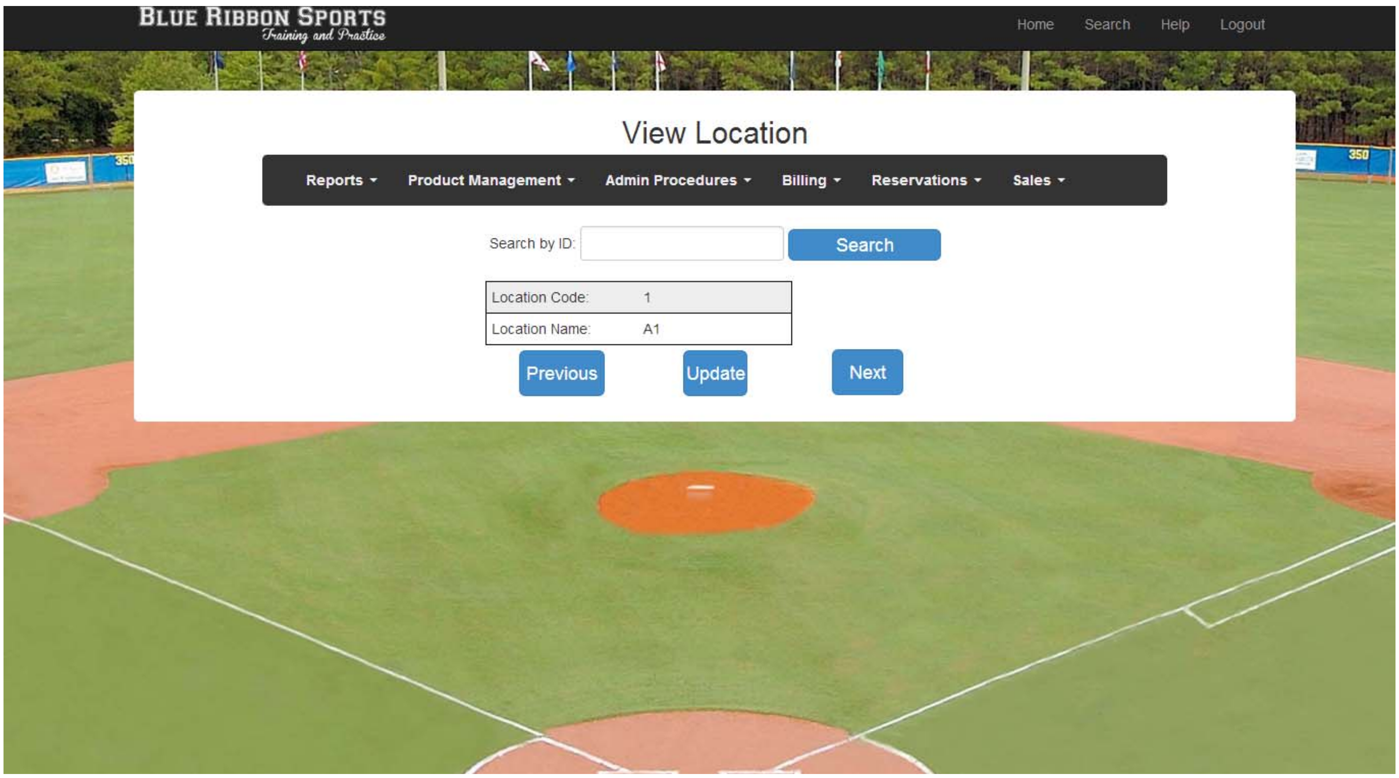
The Add Categories screen allows for the entry of a new category into the system.



1. The next available Category ID will be populated into the form. You must then enter the Category Name for the new category.
2. Once complete, click the “Add Category” button to create the category.
3. If any required fields are left blank, you will be prompted to enter them before the Add Category button will work.

View Location Code

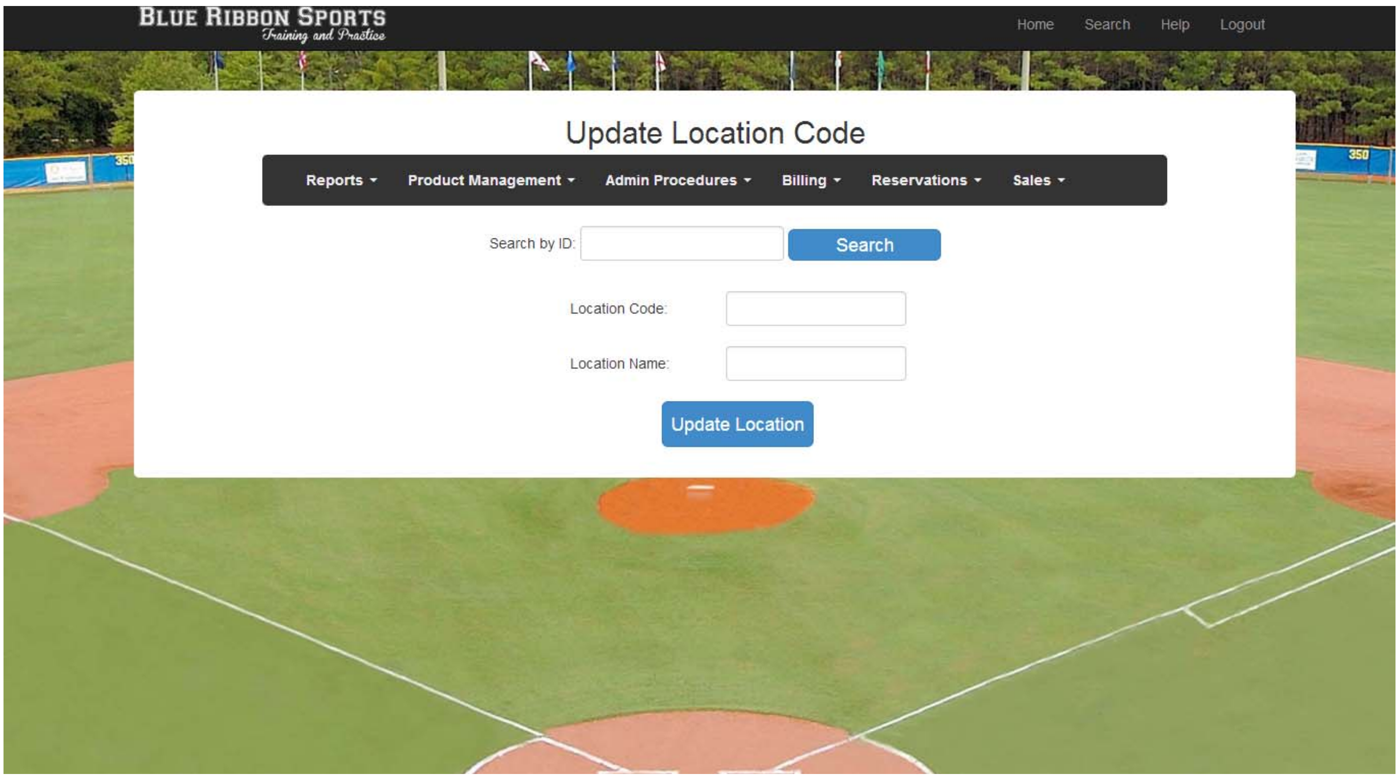
The View Location Code screen displays the Location ID and Location Description for the selected location id..



1. To search for a specific Location, enter the Location Code ID in the Search by ID field and click Search. To browse forward and backward through locations, click on the Next and Previous buttons.
2. If the details of a selected Location need to be updated, click on the Update button to be sent to the Update Location screen (Page 114) for this Location.

Update Location Code

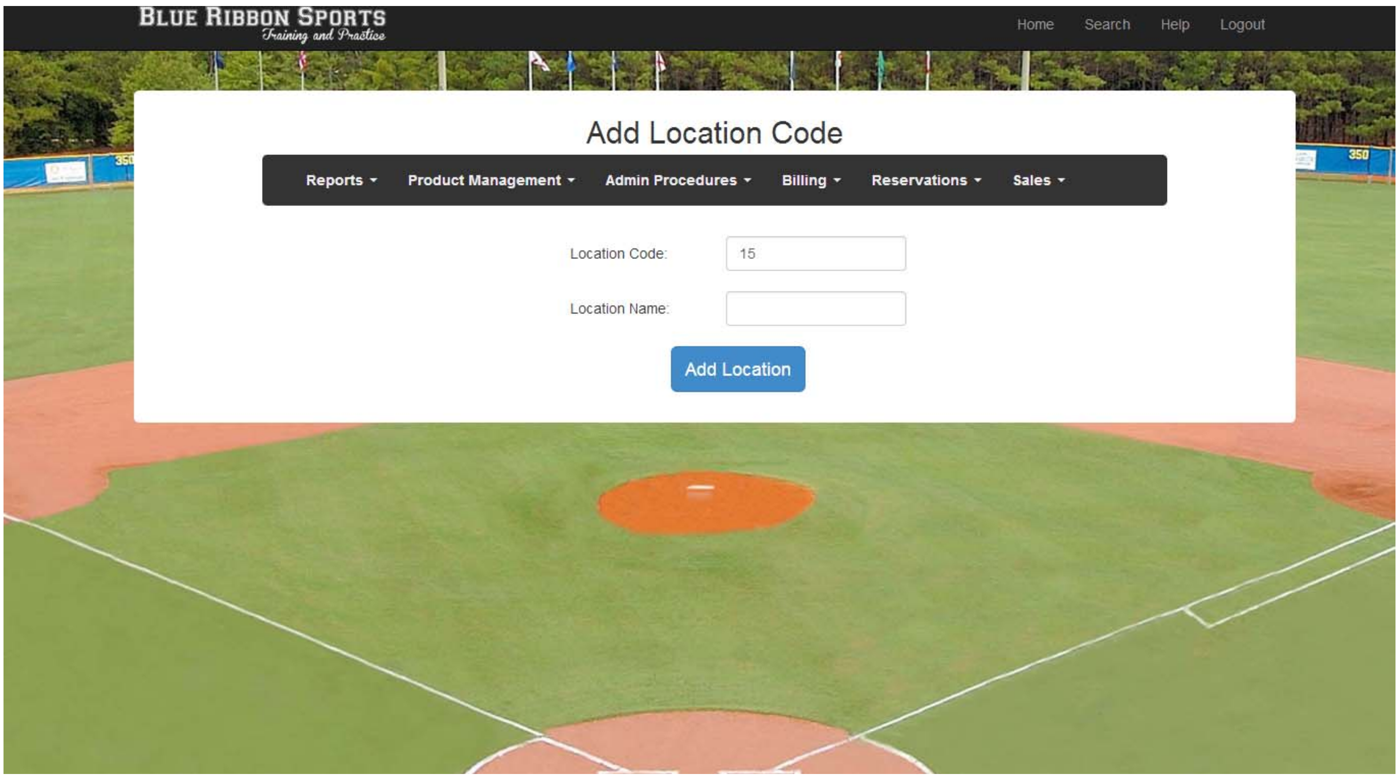
The Update Location screen displays the Location ID and Location Description for the selected location id in an editable format.



1. To update an existing Location, enter the Location ID in the "Search by ID" field and click "Search."
2. The Location's existing information will be loaded into the form.
3. Perform any required updates and then click "Update Location."
4. If any required fields are left blank, you will be prompted to enter them before the "Update Location" button will work.

Add Location Code

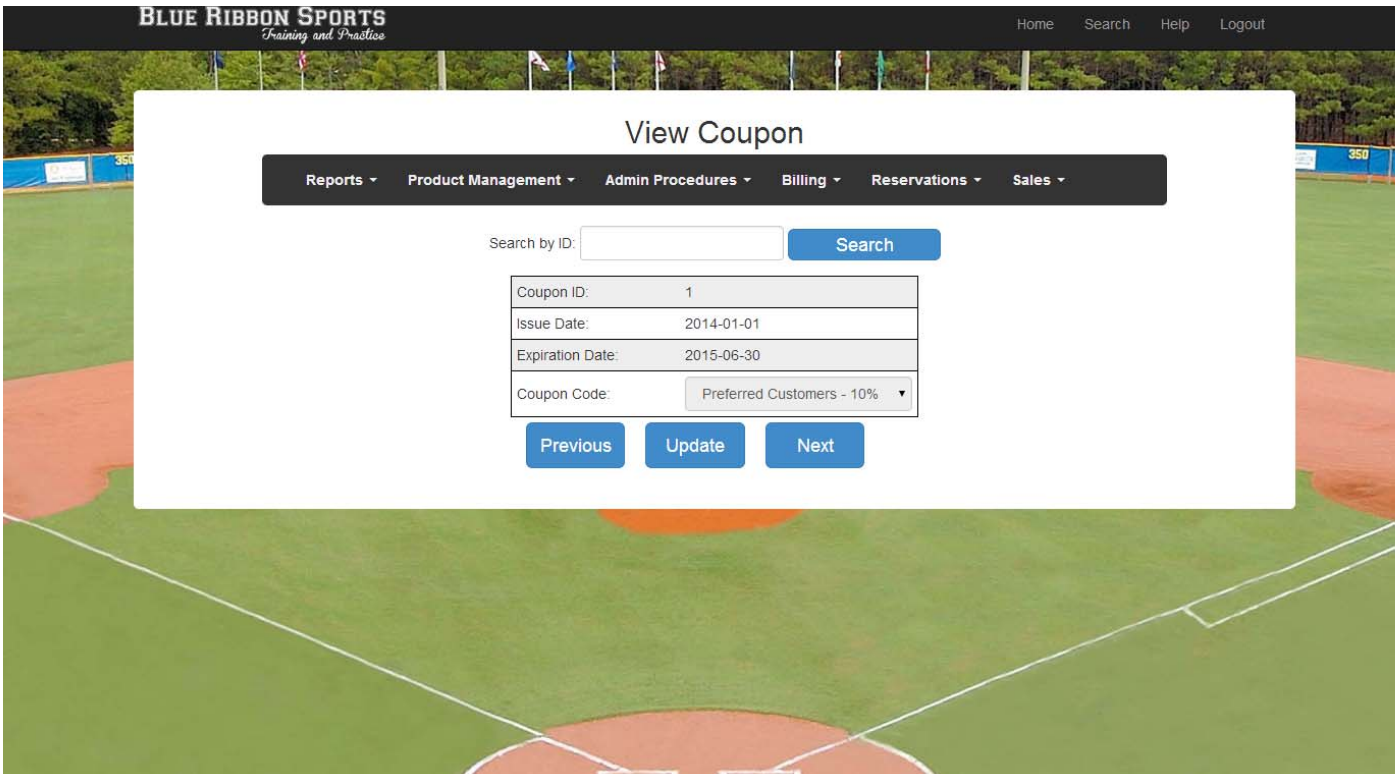
The Add Location Code screen allows for the entry of a new location into the system



1. The next available Location ID will be populated into the form. You must then enter the Location Name for the new location.
2. Once complete, click the "Add Location" button to create the location.
3. If any required fields are left blank, you will be prompted to enter them before the Add Location button will work.

View Coupon

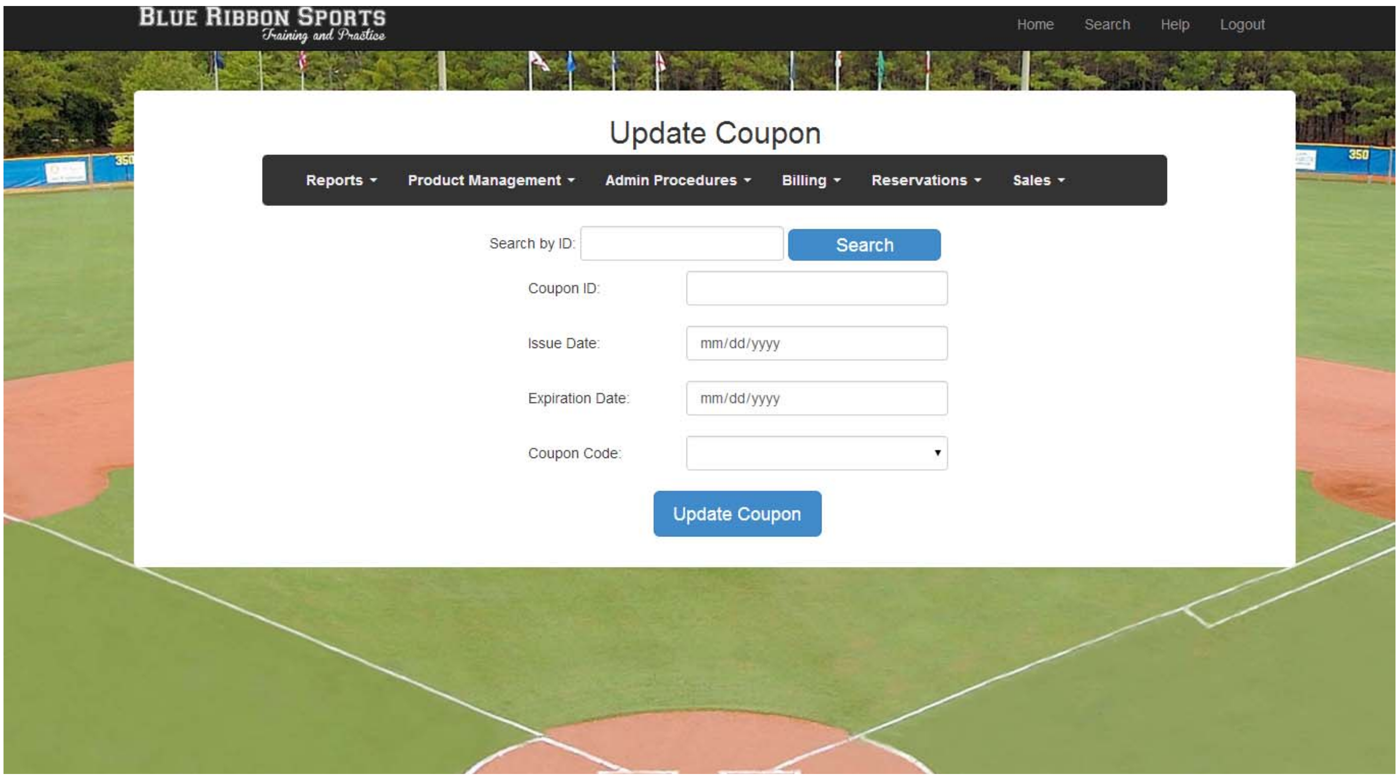
The View Coupon screen displays the Coupon ID, Issue Date, Expiration Date and Coupon Code for the selected coupon id. From this screen you can navigate to update coupon if needed.



1. To search for a specific Coupon, enter the Coupon ID in the Search by ID field and click Search. To browse forward and backward through coupons, click on the Next and Previous buttons.
2. If the details of a selected Coupon need to be updated, click on the Update button to be sent to the Update Coupon screen (Page 118) for this coupon.

Update Coupon

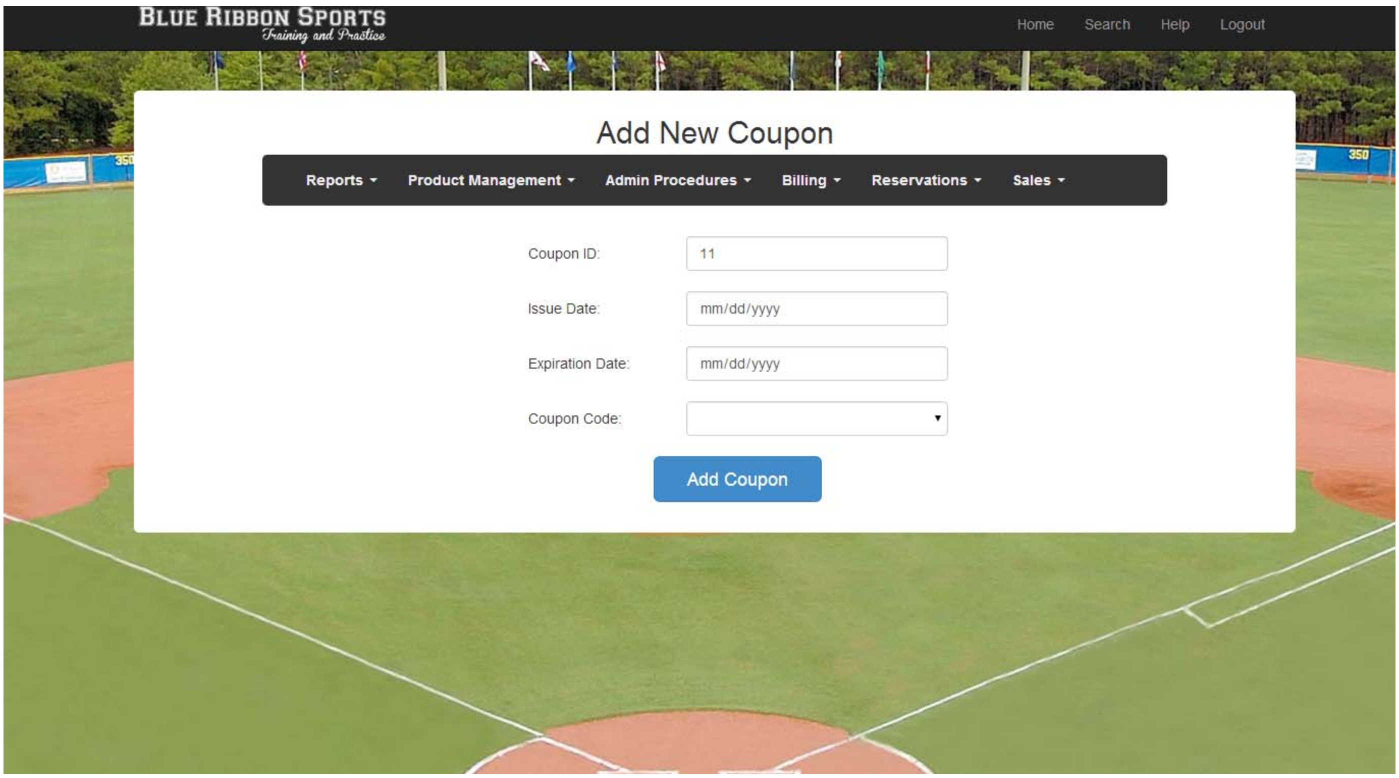
The Update Coupon screen displays the Coupon ID, Issue Date, Expiration Date and Coupon Code for the selected coupon id in an editable format.



1. To update an existing Coupon, enter the Coupon ID in the "Search by ID" field and click "Search."
2. The Coupon's existing information will be loaded into the form.
3. Perform any required updates and then click "Update Coupon."
4. If any required fields are left blank, you will be prompted to enter them before the "Update Coupon" button will work.

Add Coupon

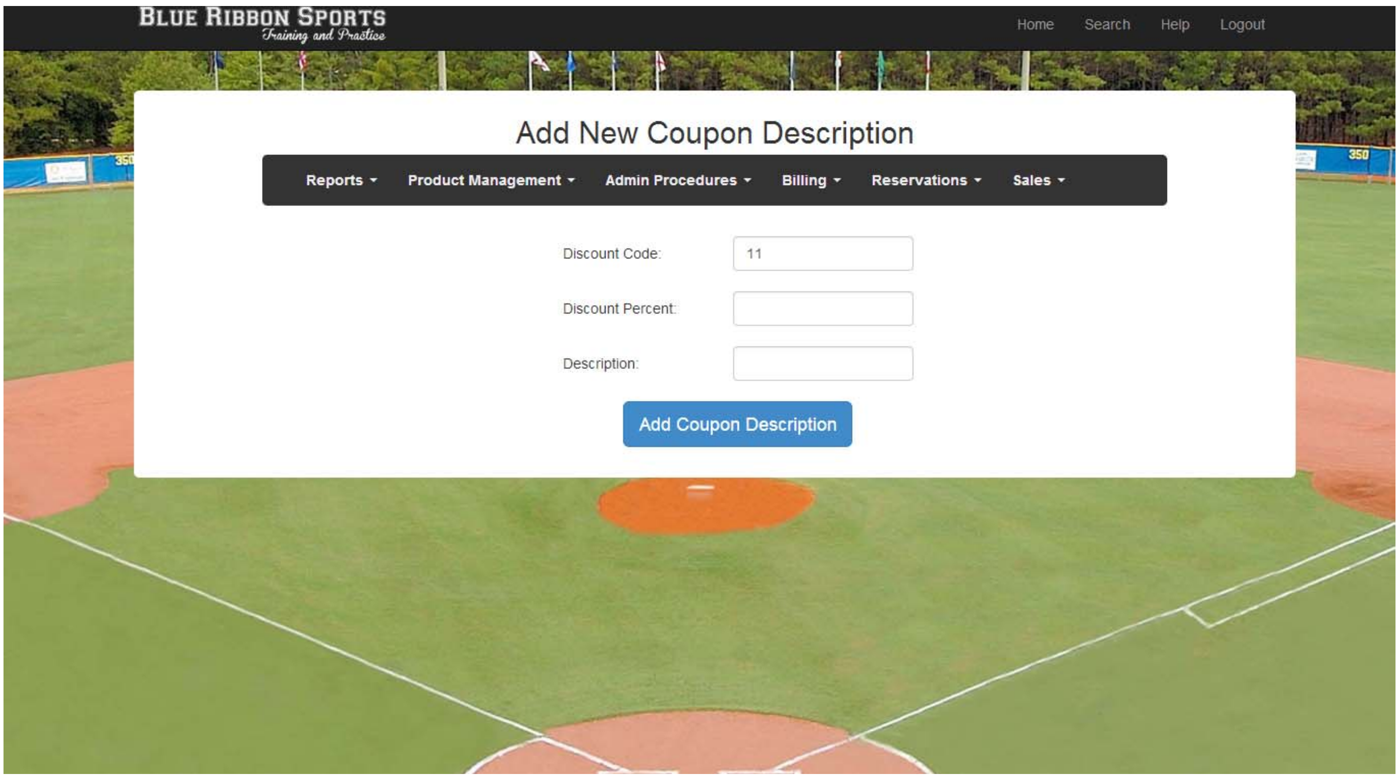
The Add Coupon screen allows for the entry of a new coupon into the system.



1. The next available Coupon ID will be populated into the form. You must then enter the Issue Date, Expiration Date, and Coupon Description for the new coupon. In Chrome, a Date field will be displayed to simplify entry. In other browsers, dates should be entered in yyyy-mm-dd format.
2. Once complete, click the “Add Coupon” button to create the location.
3. If any required fields are left blank, you will be prompted to enter them before the Add Coupon button will work.

Add Coupon Description

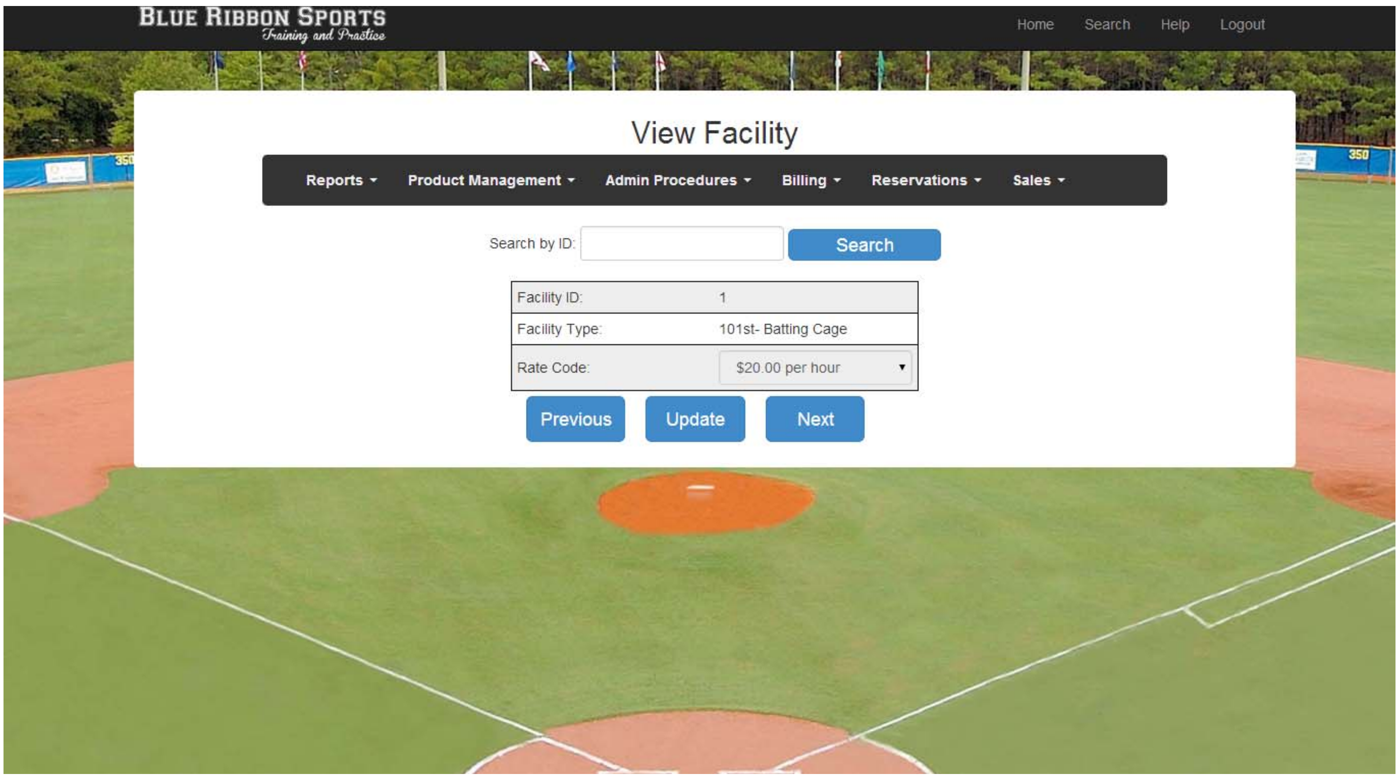
The Add Coupon Description screen allows for the entry of a new coupon description into the system.



1. The next available Description ID will be populated into the form. You must then enter the Description Percent and Coupon Description for the new coupon.
2. Once complete, click the "Add Coupon Description" button to create the description.
3. If any required fields are left blank, you will be prompted to enter them before the Add Coupon Description button will work.

View Facility

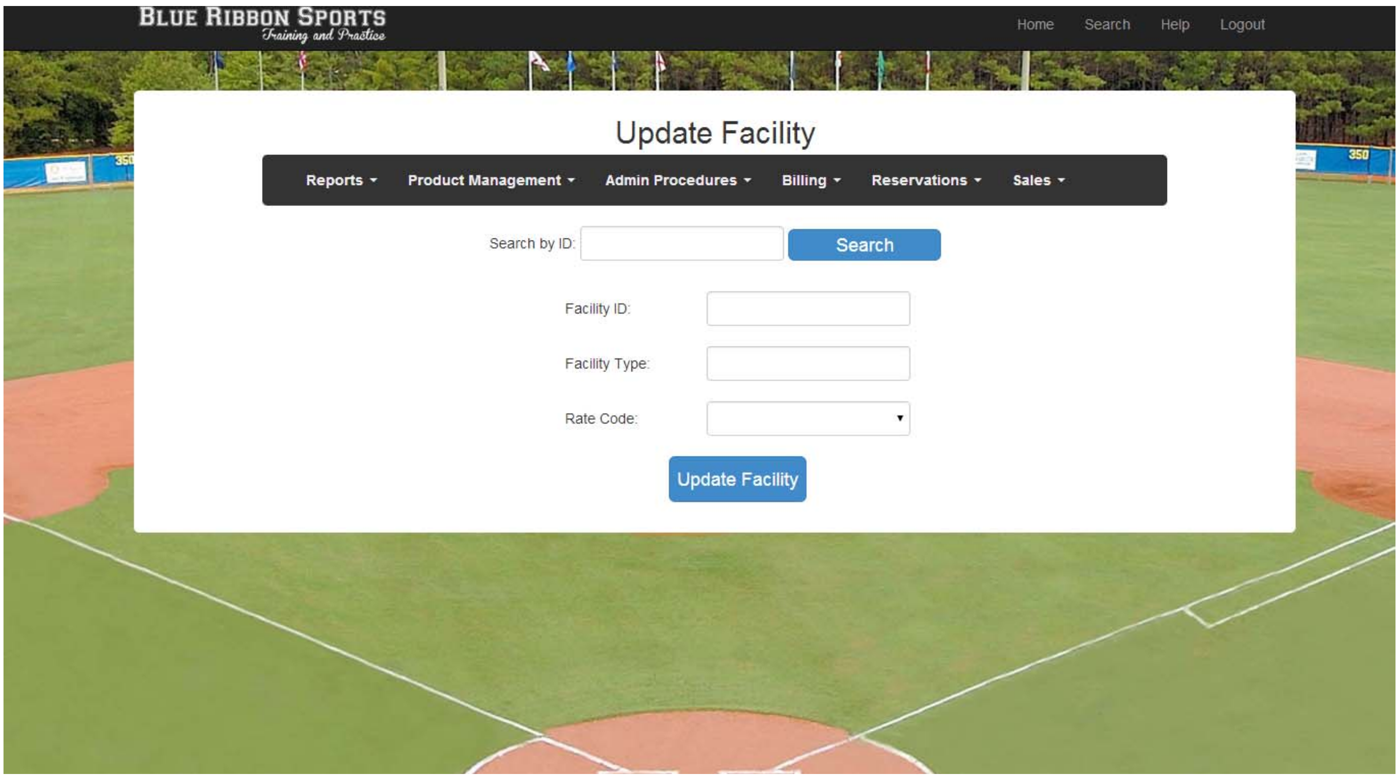
The View Facility screen displays the Facility ID, Facility Type and Rate Code for the selected facility. From this screen you can navigate to update facility if needed.



1. To search for a specific Facility, enter the Facility ID in the Search by ID field and click Search. To browse forward and backward through facilities, click on the Next and Previous buttons.
2. If the details of a selected Facility need to be updated, click on the Update button to be sent to the Update Facility screen (Page 122) for this facility.

Update Facility

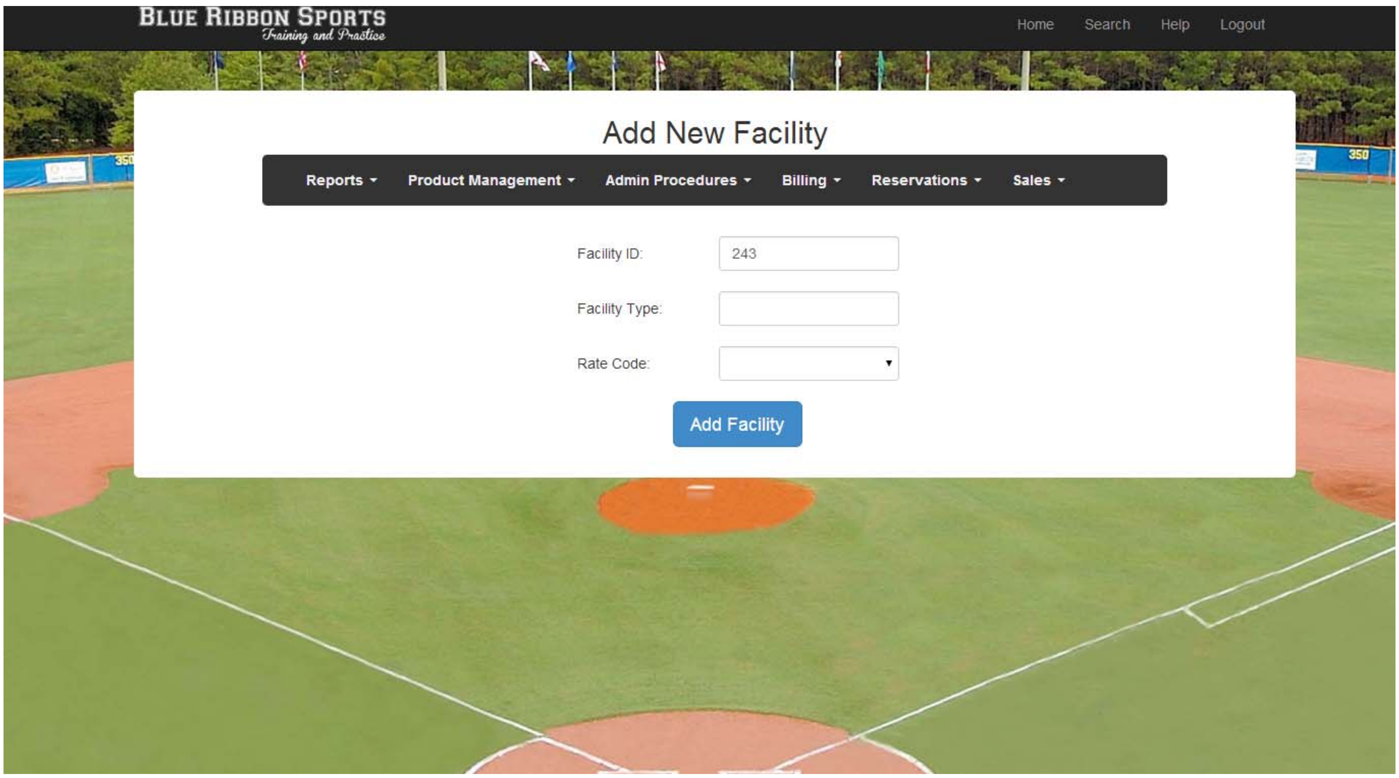
The Update Facility screen displays the Facility ID, Facility Type and Rate Code for the selected facility in an editable format.



1. To update an existing Facility, enter the Facility ID in the "Search by ID" field and click "Search."
2. The Facility's current information will be loaded into the form.
3. Perform any required updates and then click Update Facility.
4. If any required fields are left blank, you will be prompted to enter them before the "Update Facility" button will work.

Add Facility

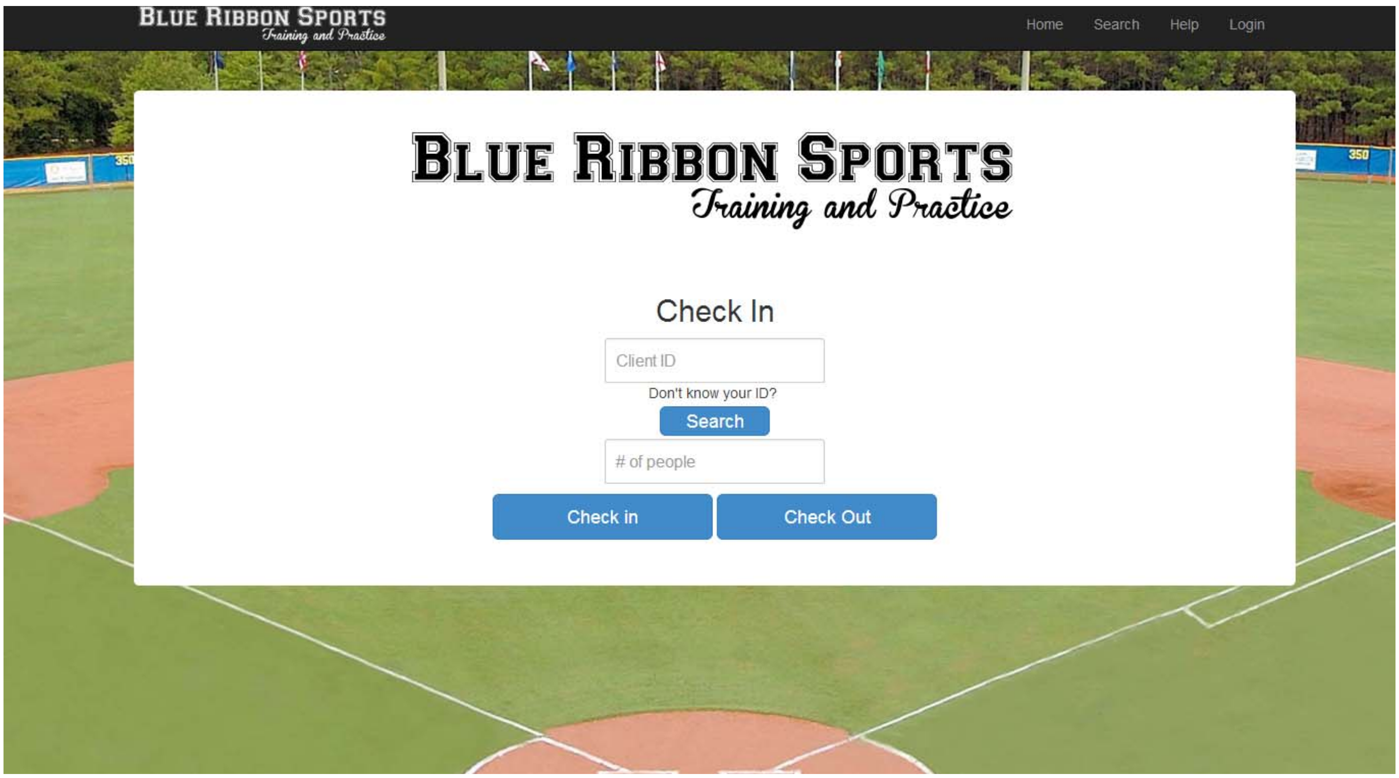
The Add Facility screen allows for the entry of a new facility into the system.



1. The next available Facility ID will be populated into the form. You must then enter the Facility Type and Rate Code for the new Facility.
2. Once complete, click the “Add Facility” button to create the facility.
3. If any required fields are left blank, you will be prompted to enter them before the Add Facility button will work.

Check-in / Check-out

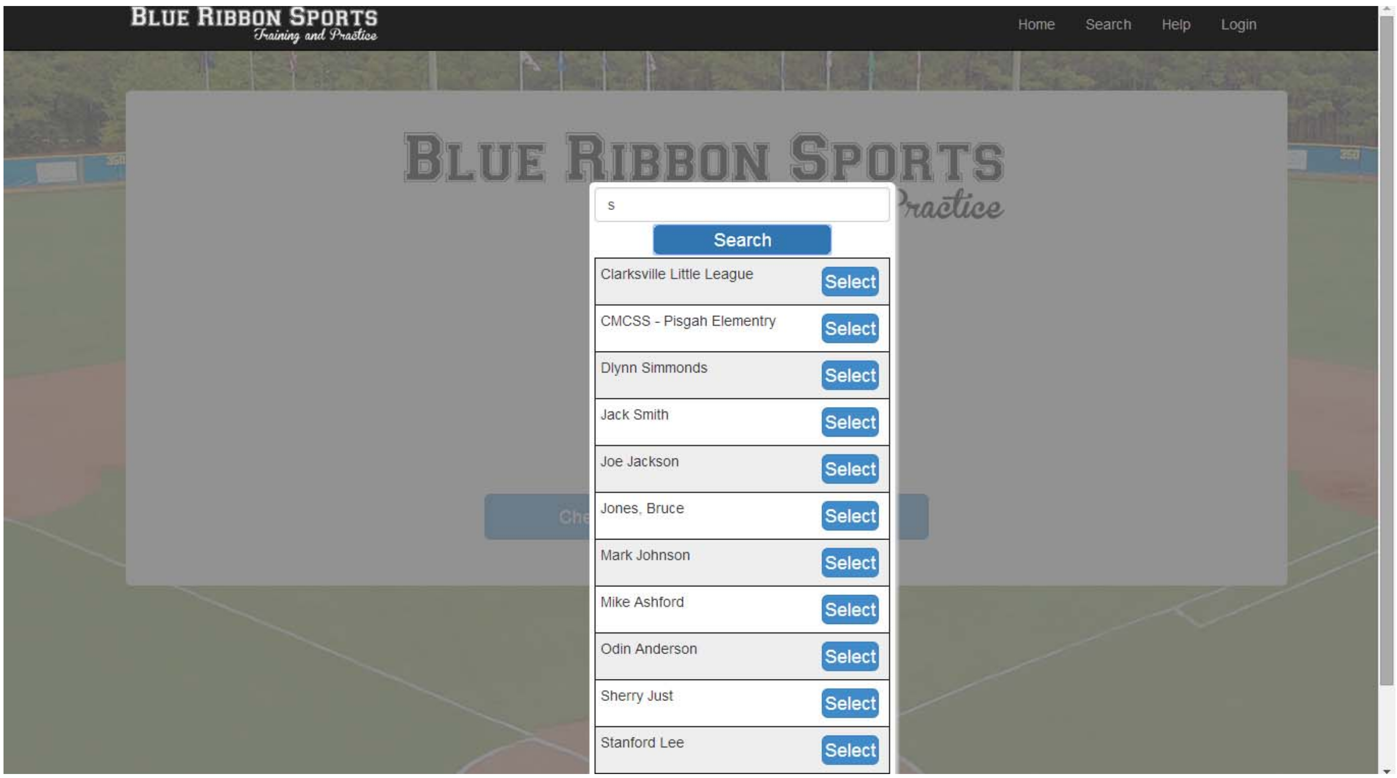
The Client Check in screen is used to check clients into and out of the facility.



1. To check in, a client should enter their ID and the number of people in their group.
2. Once complete, click the Check In button.
3. To check out, a client should once again enter their ID.
4. Once complete, click the Check Out button.

Check-in Client Search

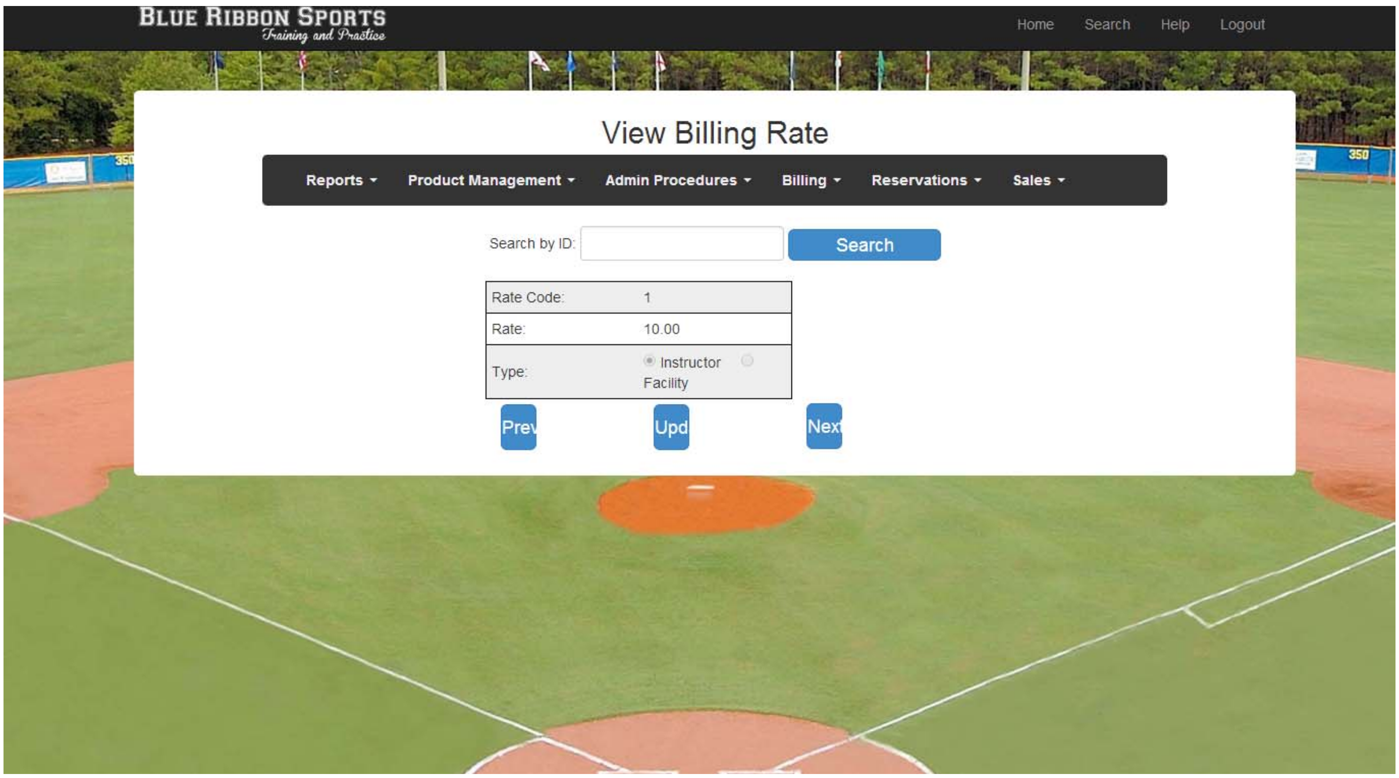
The Check-in Client Search allows for searching for an existing Client ID when a client is being checked-in.



1. After clicking the Search button, a search field and button will appear.
2. Type in the name of the desired client and click Search.
3. A list of matching clients will be displayed. To enter the matching ID for the desired client, click the Select button next to that client's name.

View Billing Rate

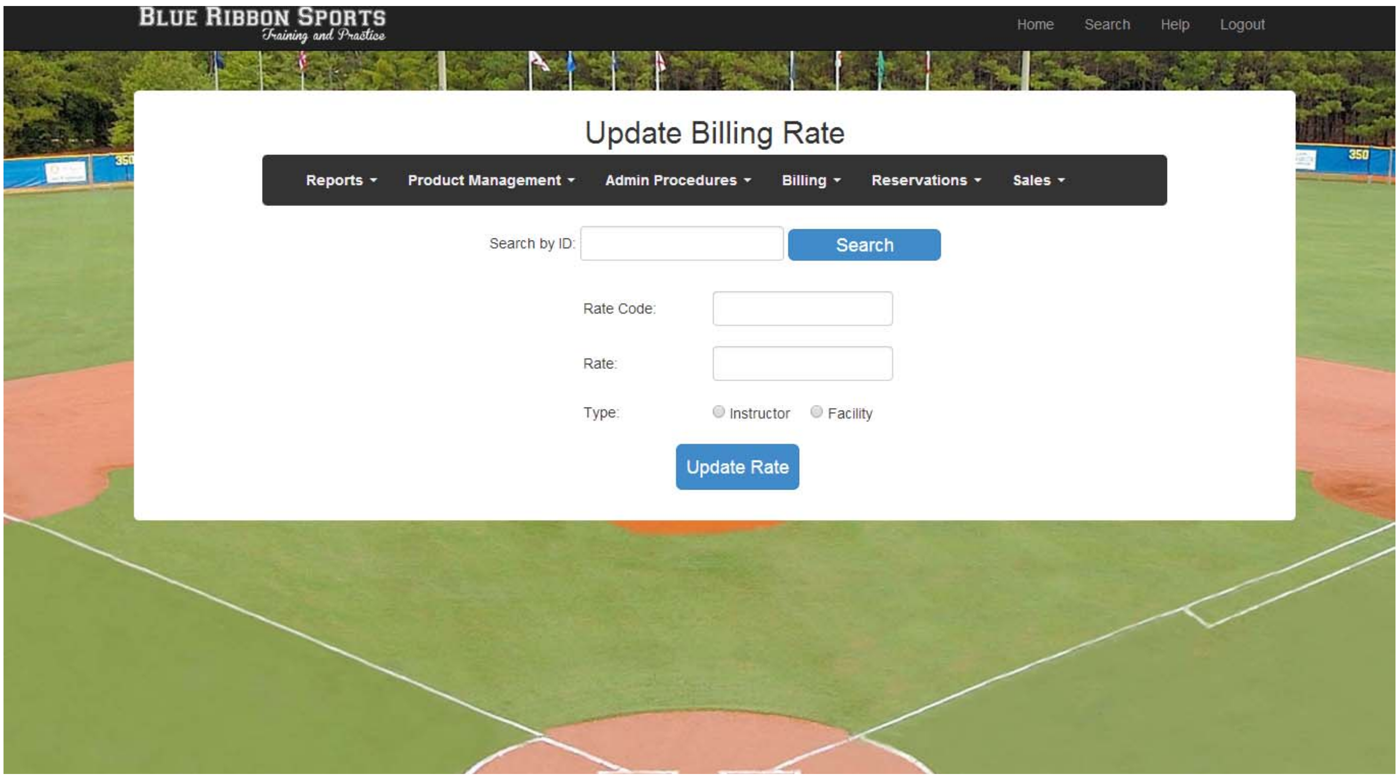
The View Billing Rate screen displays the Rate Code, Rate and Rate Type for the selected rate id. Form this screen you can navigate to update rate if needed.



1. To search for a specific Rate, enter the Rate ID in the Search by ID field and click Search. To browse forward and backward through rates, click on the Next and Previous buttons.
2. If the details of a selected Rate need to be updated, click on the Update button to be sent to the Update Billing Rate screen (Page 127) for this rate.

Update Billing Rate

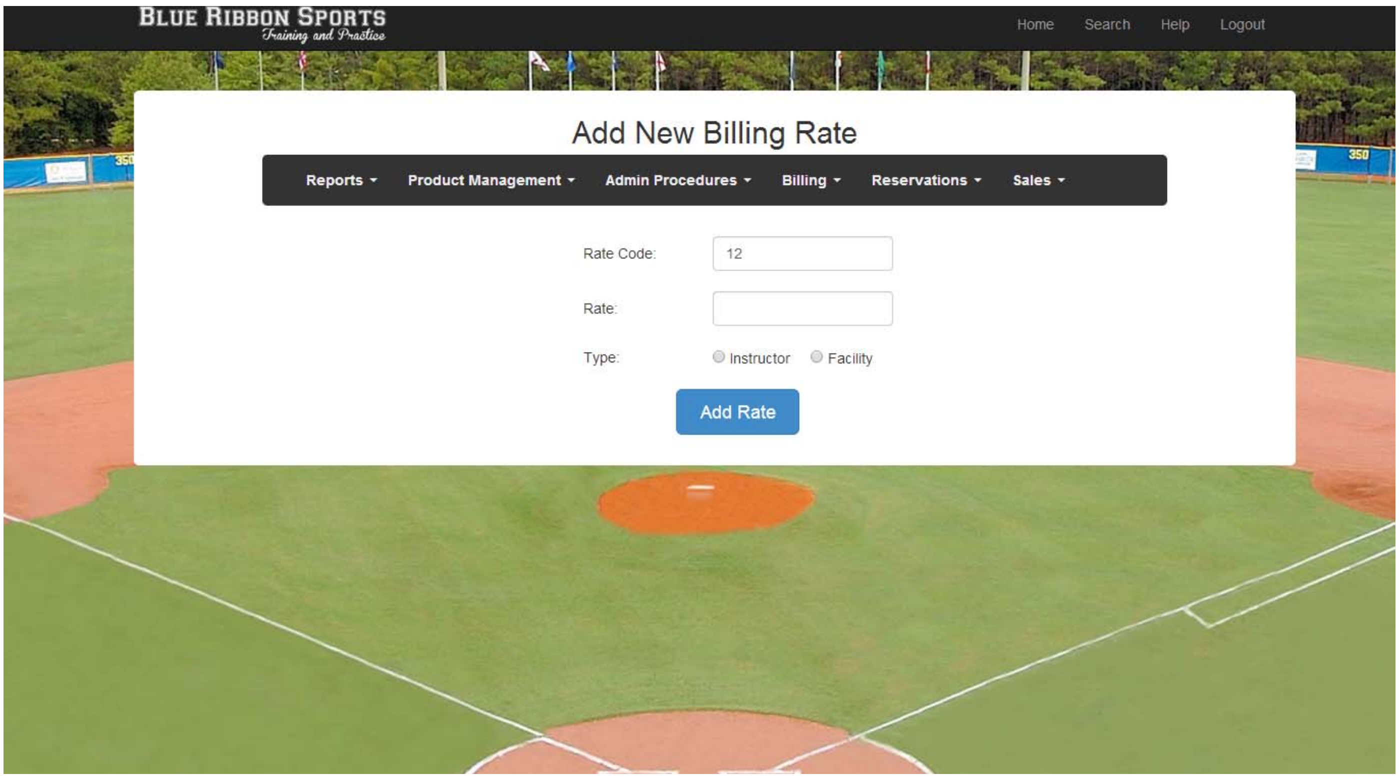
The Update Billing Rate screen displays the Rate Code, Rate and Rate Type for the selected rate id in an editable format.



1. To update an existing Billing Rate, enter the Rate Coode in the “Search by ID” field and click “Search.”
2. The Rate’s current information will be loaded into the form.
3. Perform any required updates and then click Update Rate.
4. If any required fields are left blank, you will be prompted to enter them before the “Update Rate” button will work.

Add Billing Rate

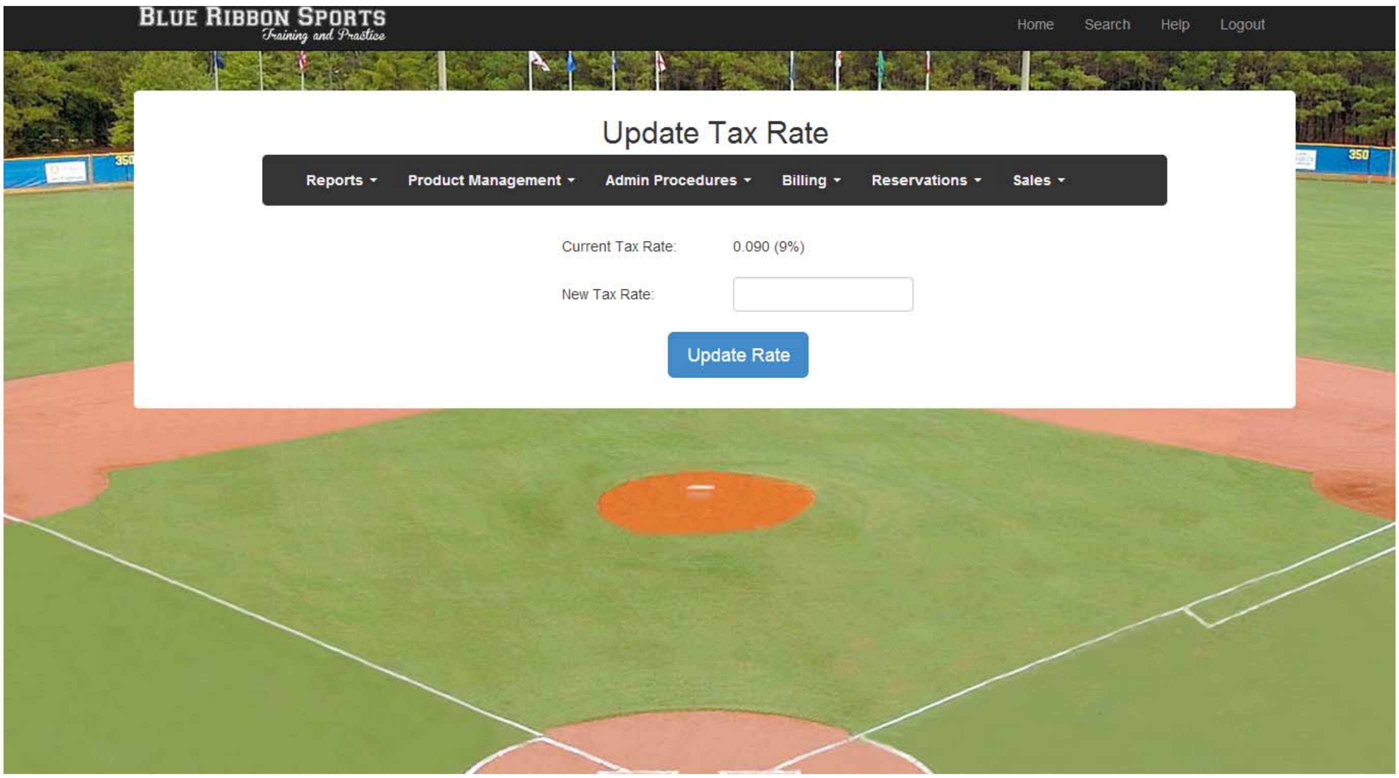
The Add Billing Rate screen allows for the entry of a new Facility or Instructor rate into the system.



1. The next available Rate ID will be populated into the form. You must then enter the Rate and select one of the two available types (Instructor or Facility) for the new Rate.
2. Once complete, click the “Add Rate” button to create the rate.
3. If any required fields are left blank, you will be prompted to enter them before the Add Rate button will work.

Update Tax Rate

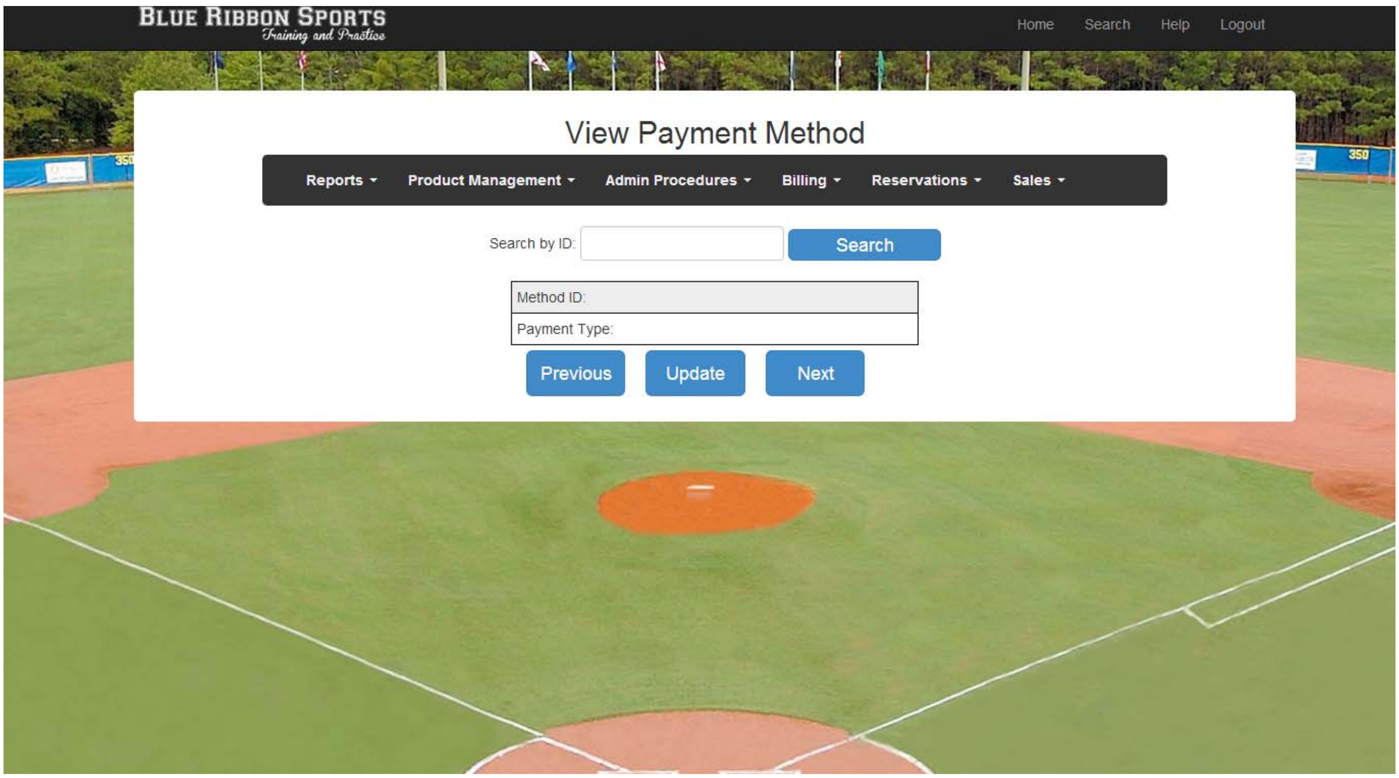
The View Update Tax Rate screen displays the current tax rate applied to sales and invoices and allows for updating the rate.



1. The existing Tax Rate will be displayed on the page.
2. Enter the new desired rate and then click “Update Tax Rate.”
3. If the tax rate is left blank, you will be prompted to enter it before the “Update Rate” button will work.

View Payment Method

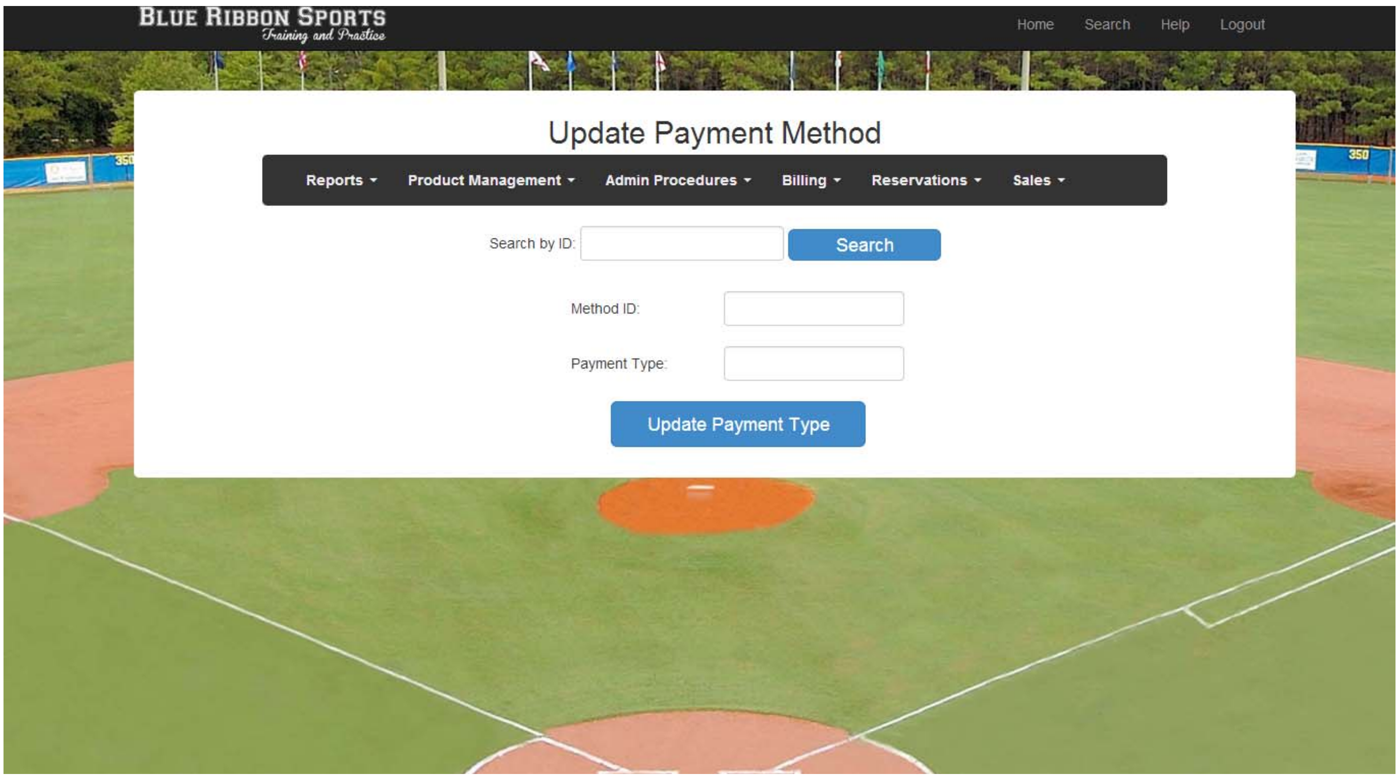
The View Payment Method screen displays the Method ID and Payment Type for the selected method id. From this screen you can navigate to the update payment method screen if needed.



1. To search for a specific Payment Method, enter the Method ID in the Search by ID field and click Search. To browse forward and backward through methods, click on the Next and Previous buttons.
2. If the details of a selected Payment Method need to be updated, click on the Update button to be sent to the Update Payment Method screen (Page 131) for this method.

Update Payment Method

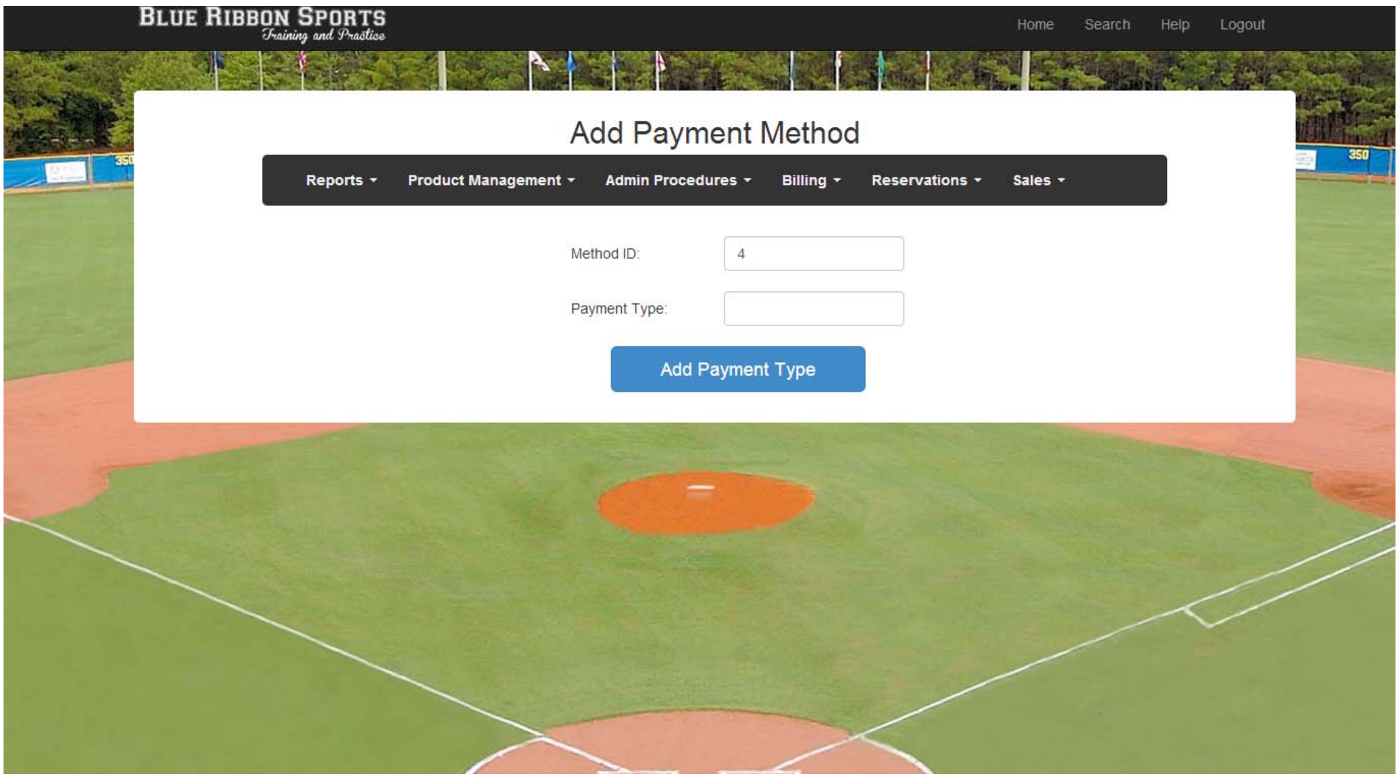
The View Payment Method screen displays the Method ID and Payment Type for the selected method id in an editable format.



1. To update an existing Payment Method, enter the Method ID in the "Search by ID" field and click "Search."
2. The Payment Method's current information will be loaded into the form.
3. Perform any required updates and then click Update Payment Type.
4. If any required fields are left blank, you will be prompted to enter them before the "Update Payment Type" button will work.

Add Payment Method

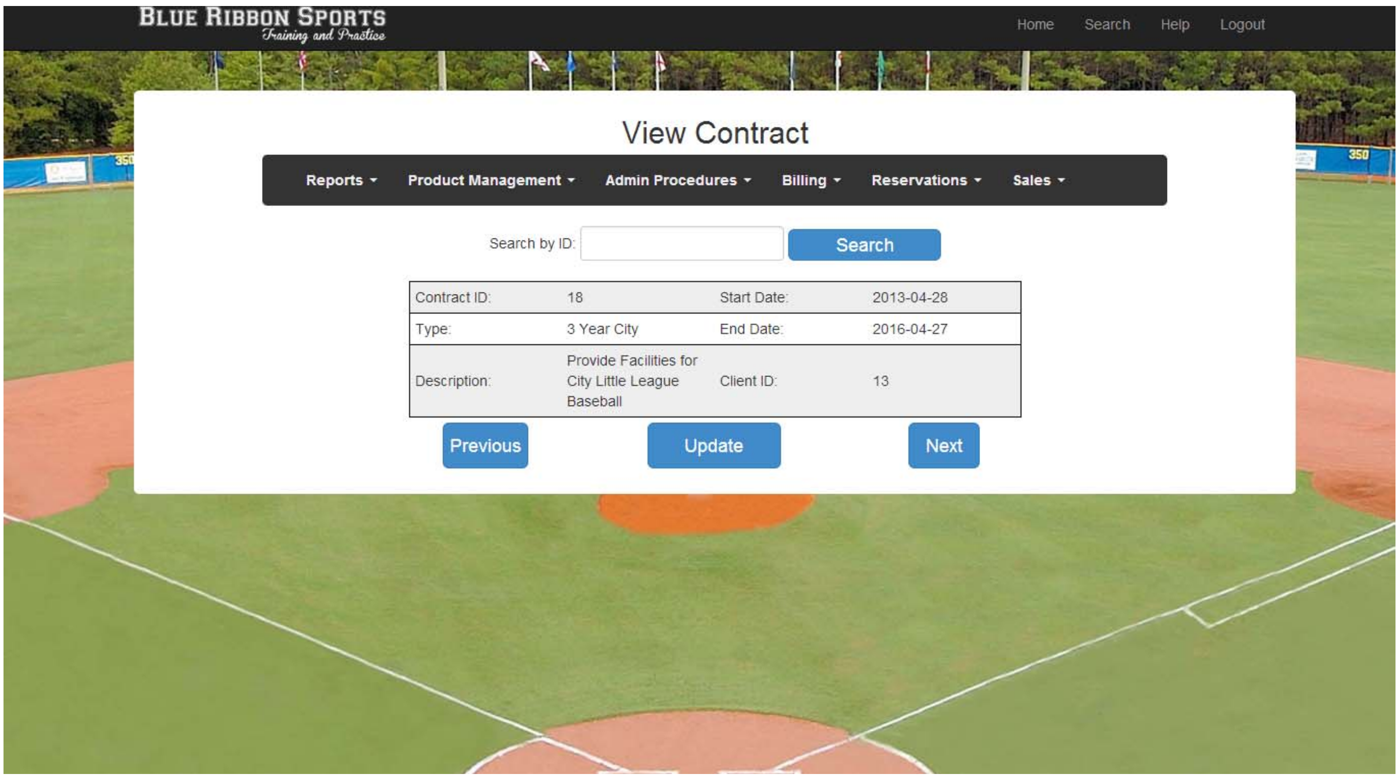
The Add Payment Method screen allows for the entry of a new payment method into the system.



1. The next available Method ID will be populated into the form. You must then enter the Payment Type for the new method.
2. Once complete, click the “Add Payment Type” button to create the payment type.
3. If any required fields are left blank, you will be prompted to enter them before the Add Payment Method button will work.

View Contract

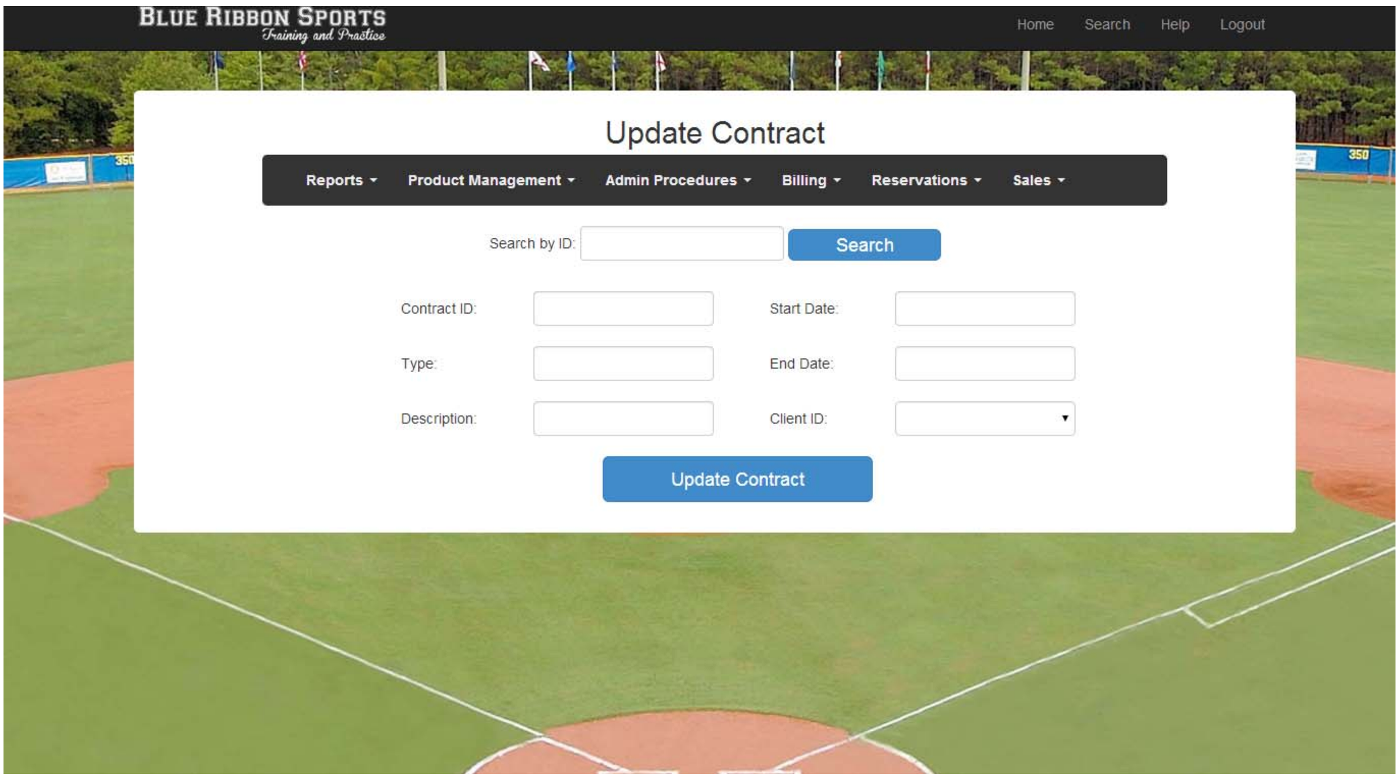
The View Contracts screen displays the Contract ID, Contract Type, Contract Description, Start Date, End Date, and the Client ID affiliated with the selected contract. From this screen you can navigate to update contract if needed.



1. To search for a specific contract, enter the Contract ID in the Search by ID field and click Search. To browse forward and backward through contracts, click on the Next and Previous buttons.
2. If the details of a selected reservation need to be updated, click on the Update button to be sent to the Update Contract screen (Page 134) for this contract.

Update Contract

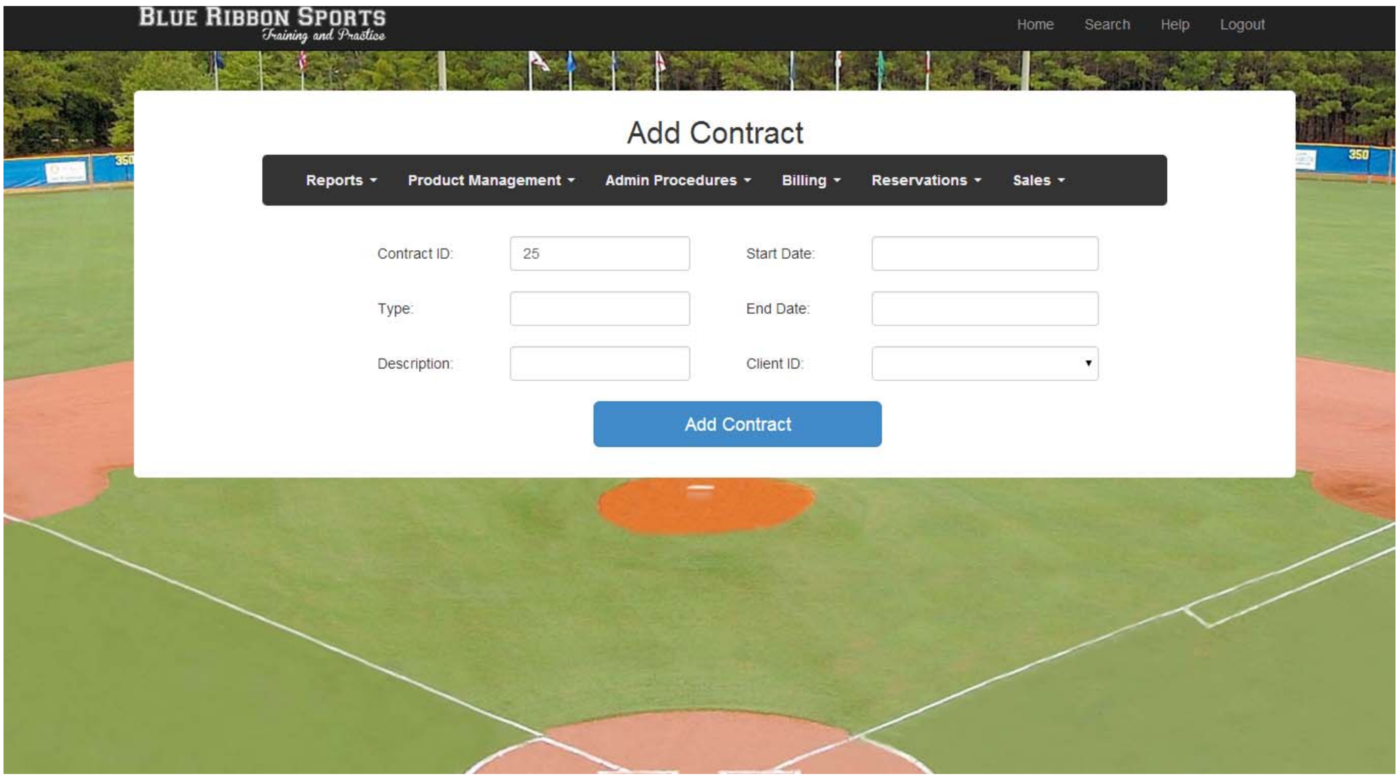
The View Contracts screen displays the Contract ID, Contract Type, Contract Description, Start Date, End Date, and the Client ID affiliated with the selected contract in an editable format.



1. To update an existing contract, enter the Contract ID in the "Search by ID" field and click "Search."
2. The Contract's current information will be loaded into the form.
3. Perform any required updates and then click Update Contract.
4. If any required fields are left blank, you will be prompted to enter them before the "Update Contract" button will work.

Add Contract

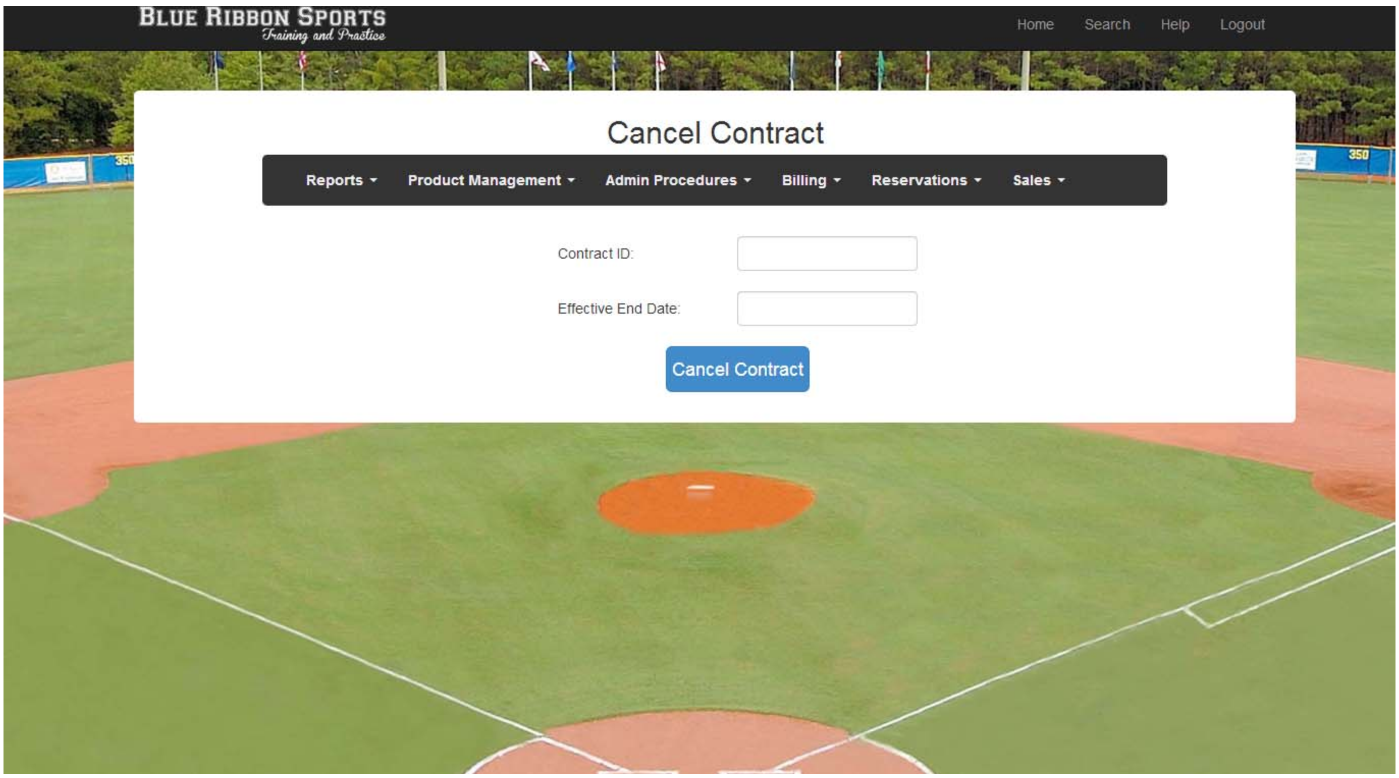
The Add Contacts screen allows for the entry of a new contract into the system.



1. The next available Contract ID will be populated into the form. You must then enter the Type, Description, Start Date, End Date, and Client ID for the new contract. In Chrome, a Date field will be displayed to simplify entry. In other browsers, dates should be entered in yyyy-mm-dd format.
2. Once complete, click the "Add Contract" button to create the description.
3. If any required fields are left blank, you will be prompted to enter them before the Add Contract button will work.

Cancel Contract

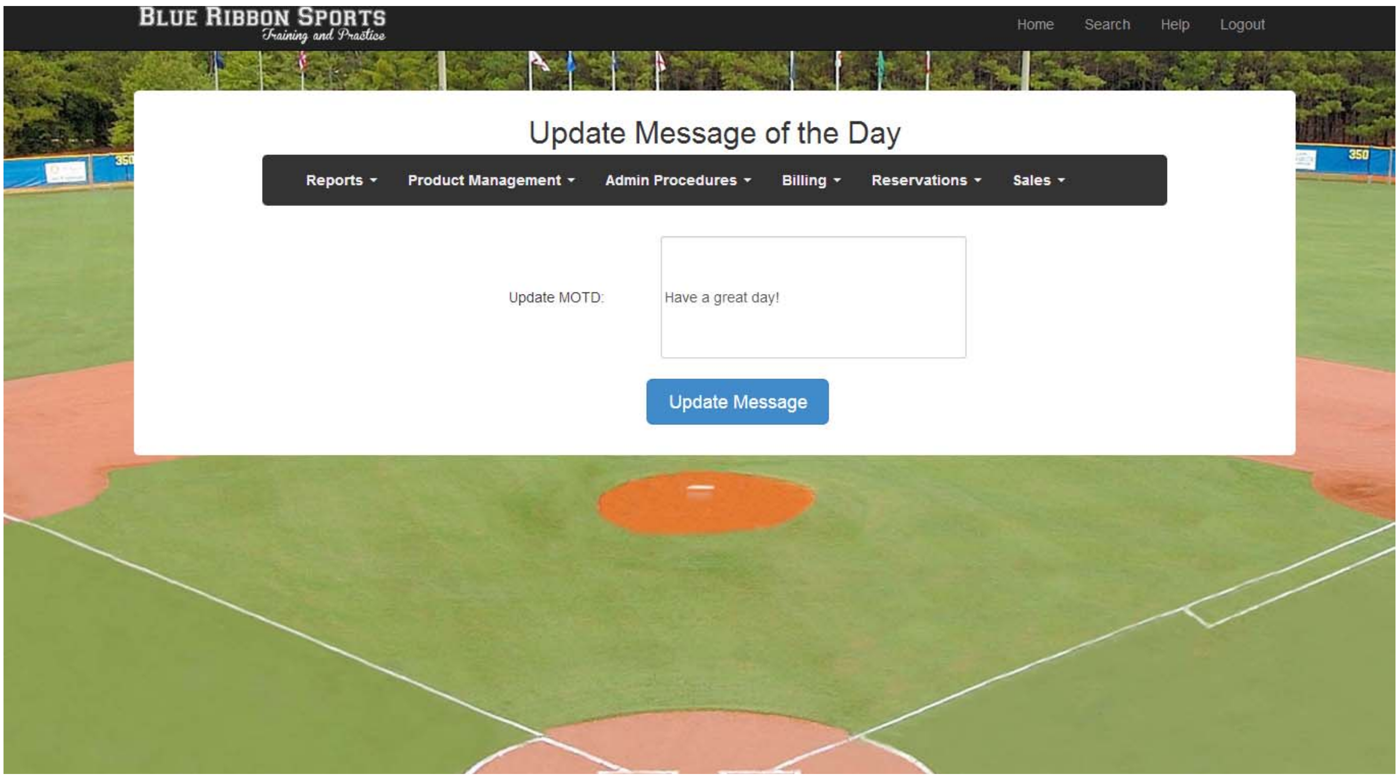
The Cancel Contract screen allows for the entry of a contract cancelation date.



1. To cancel a reservation, enter the Contract ID and effective end date, then click on Cancel Contract.

Update Message of the Day

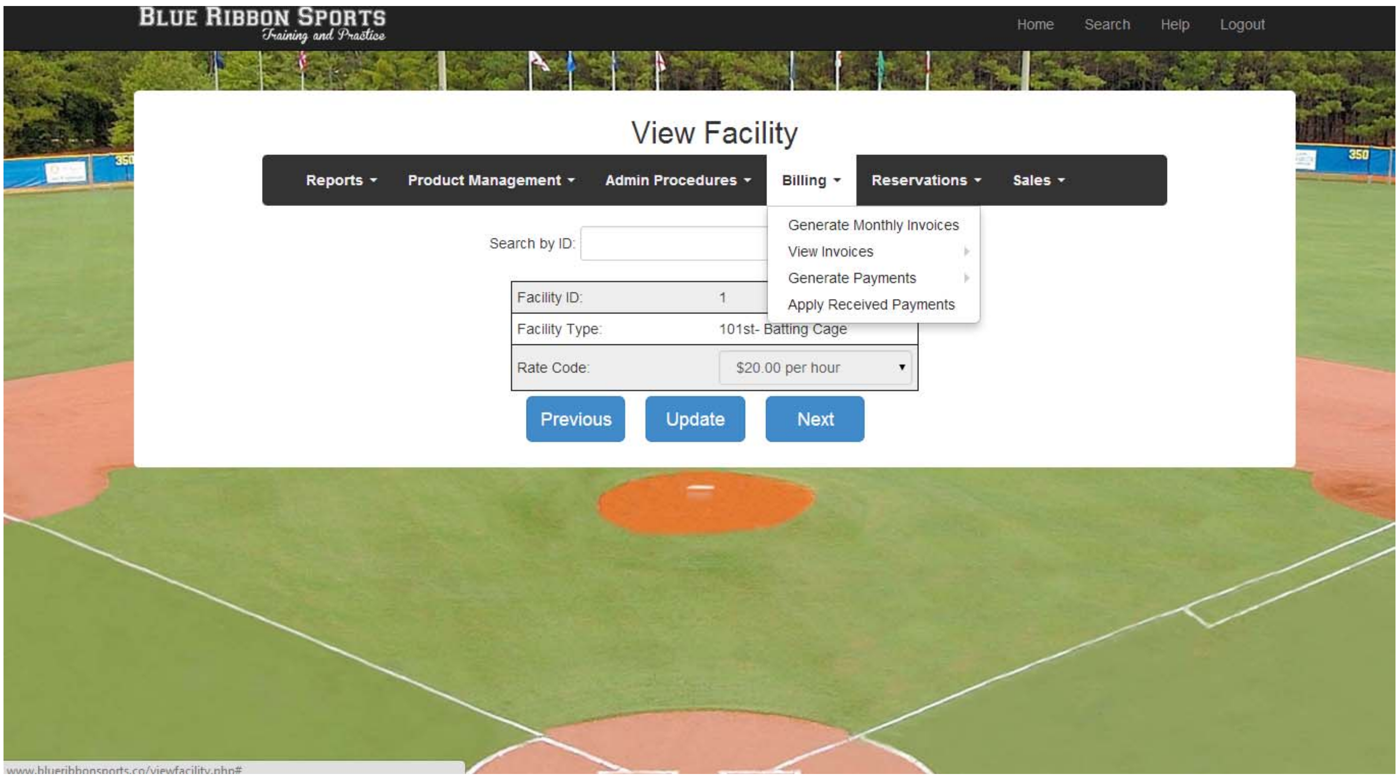
The Update Message of the Day screen is used to update the system wide notification shown to all user after login.



1. The existing Message of the Day will be loaded into the form.
2. Change the message to the new desired message and then click "Update Message."
3. If any required fields are left blank, you will be prompted to enter them before the "Update Message" button will work.

Navigation – Billing

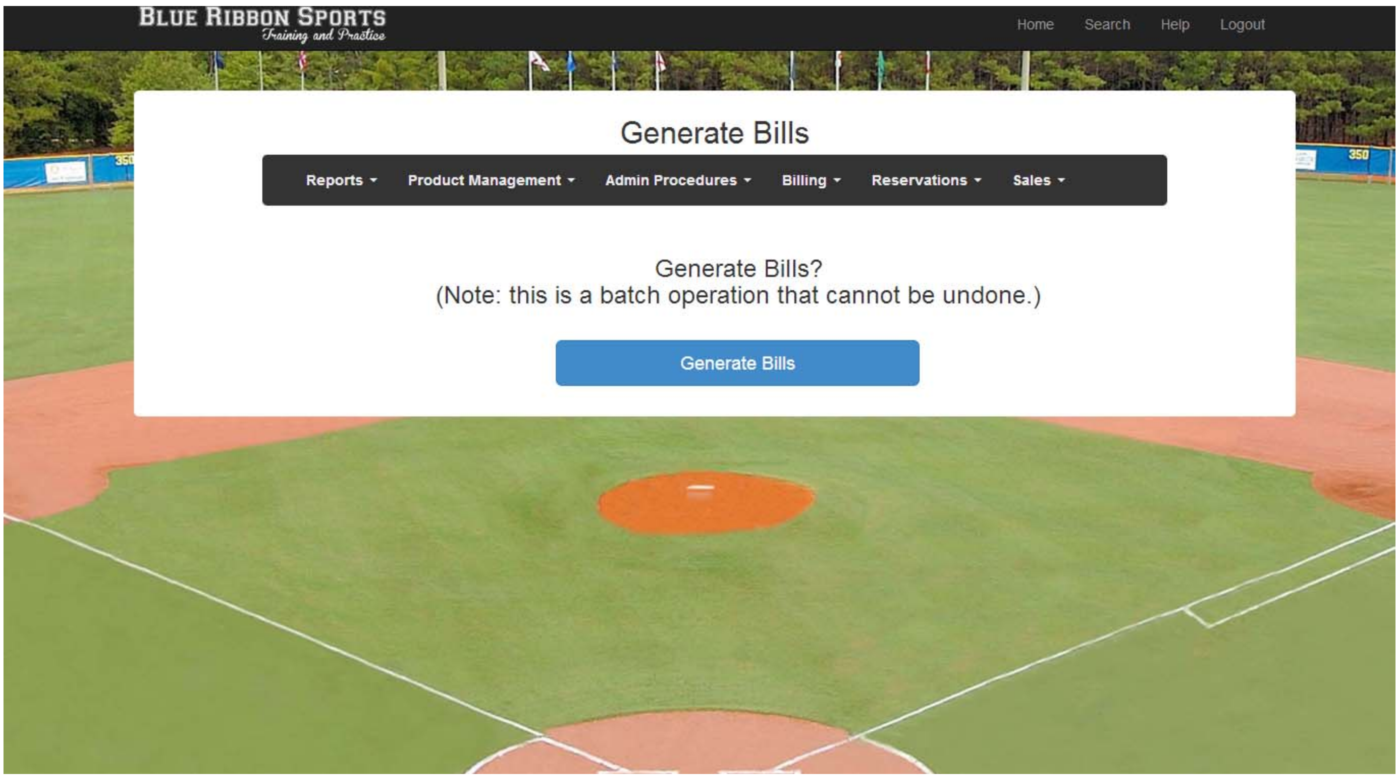
The Billing section of the navigation bar provides access to the billing information contained within the system, such as invoices and payments, separated into two links and two categories.



1. To access the Billing dropdown, click on Billing on the Navigation bar.
2. If a small gray triangle is listed to the right of the item in the dropdown, it contains further menu options. Hover over the category to see more options.
3. Click on the desired page to navigate to it.

Generate Bills

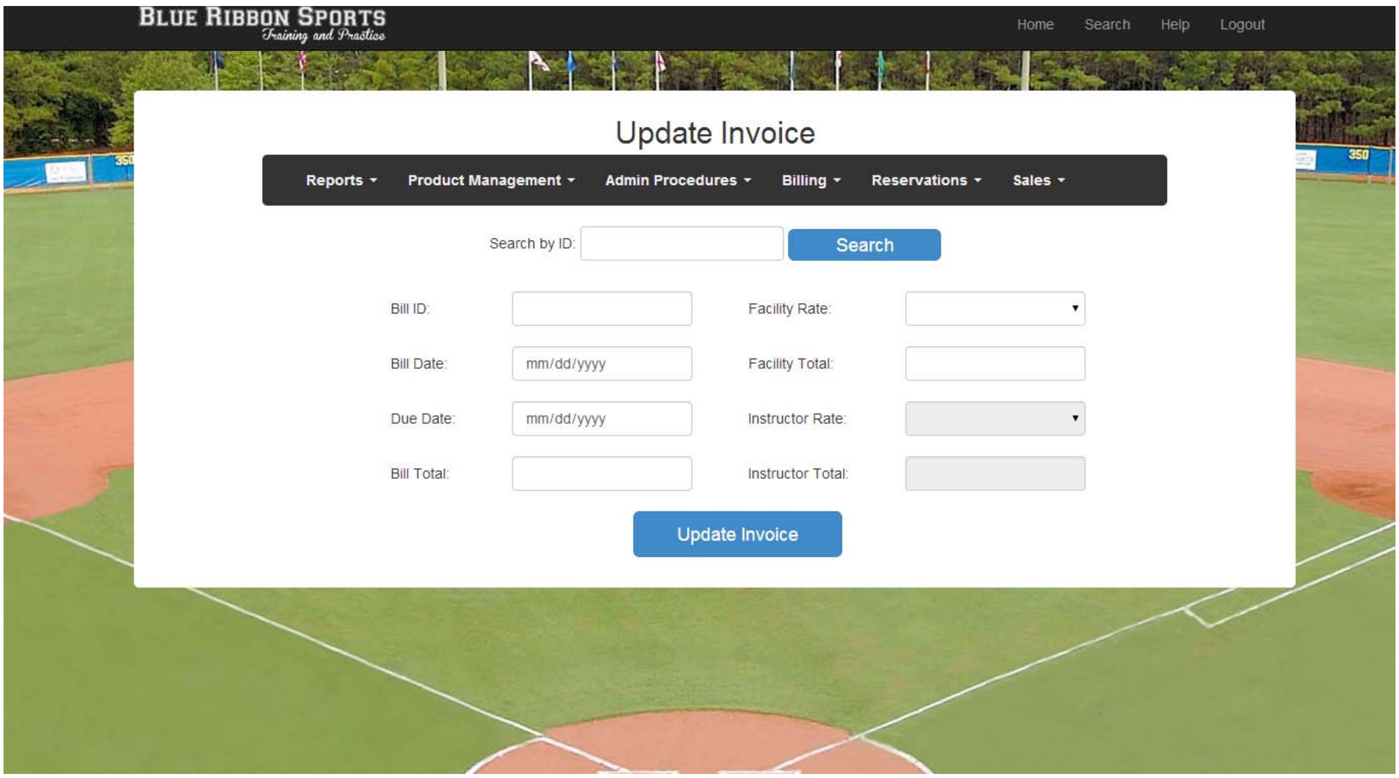
The Generate Monthly Invoice screen is allows for the creation of bills for Facility Rentals and Instructor fees.



1. To perform the bill generation process, click on the Generate Bills button. Note that this is a batch operation that cannot be undone.

Update Invoice

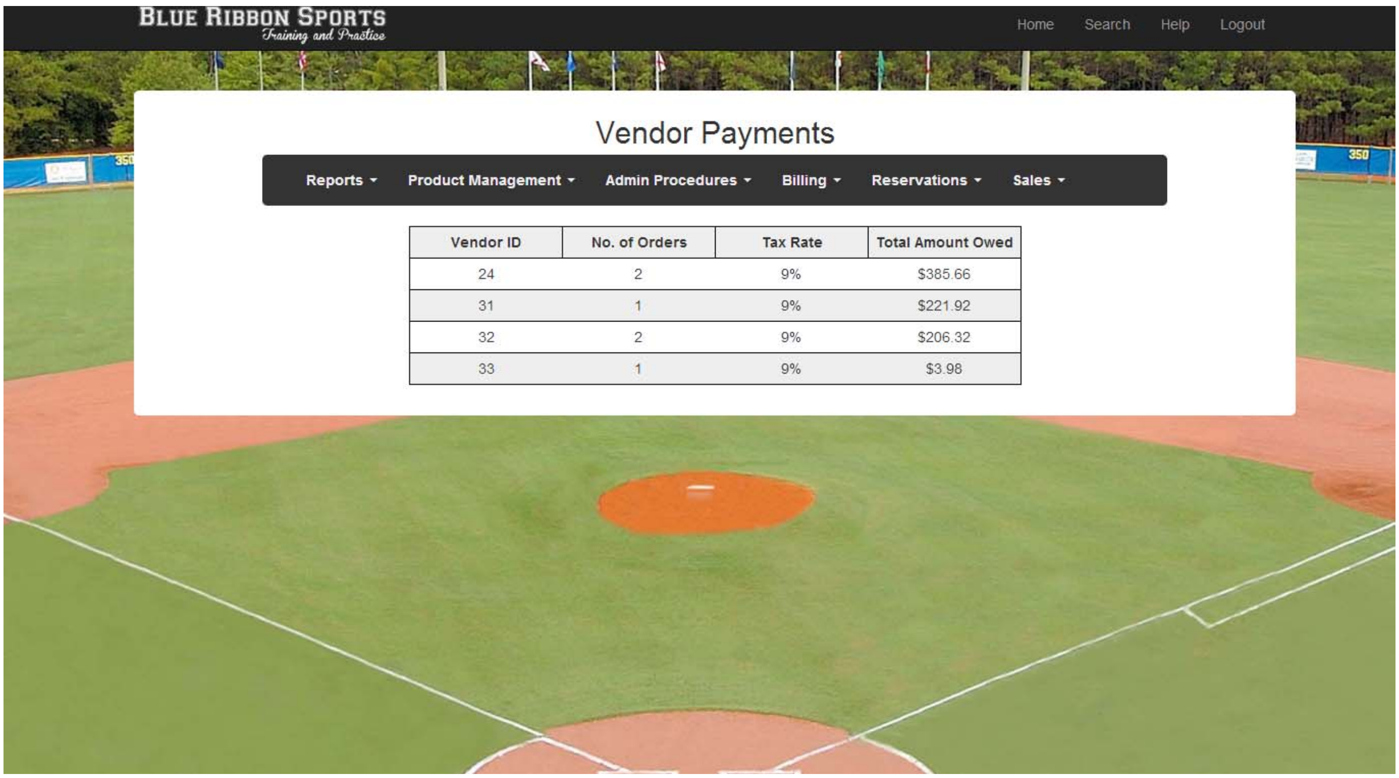
The Update Invoice screen displays the details for an individual invoice. The Bill ID, Bill Date, Due Date, Facility Rate, Facility Total, Instructor Rate, Instructor Total and Bill Total will be displayed for the selected invoice in an editable format. (If there is not an Instructor affiliated the reservation those fields will be greyed out.)



1. To update an existing invoice, enter the Bill ID in the "Search by ID" field and click "Search."
2. The Bill's current information will be loaded into the form.
3. Perform any required updates and then click Update Invoice.
4. If any required fields are left blank, you will be prompted to enter them before the "Update Invoice" button will work.

Vendor Payments

The Pay Vendor screen displays the Vendor ID, Number of Orders, Tax Rate and Total Amount Owed. This report will be forwarded to accounting to process payment.

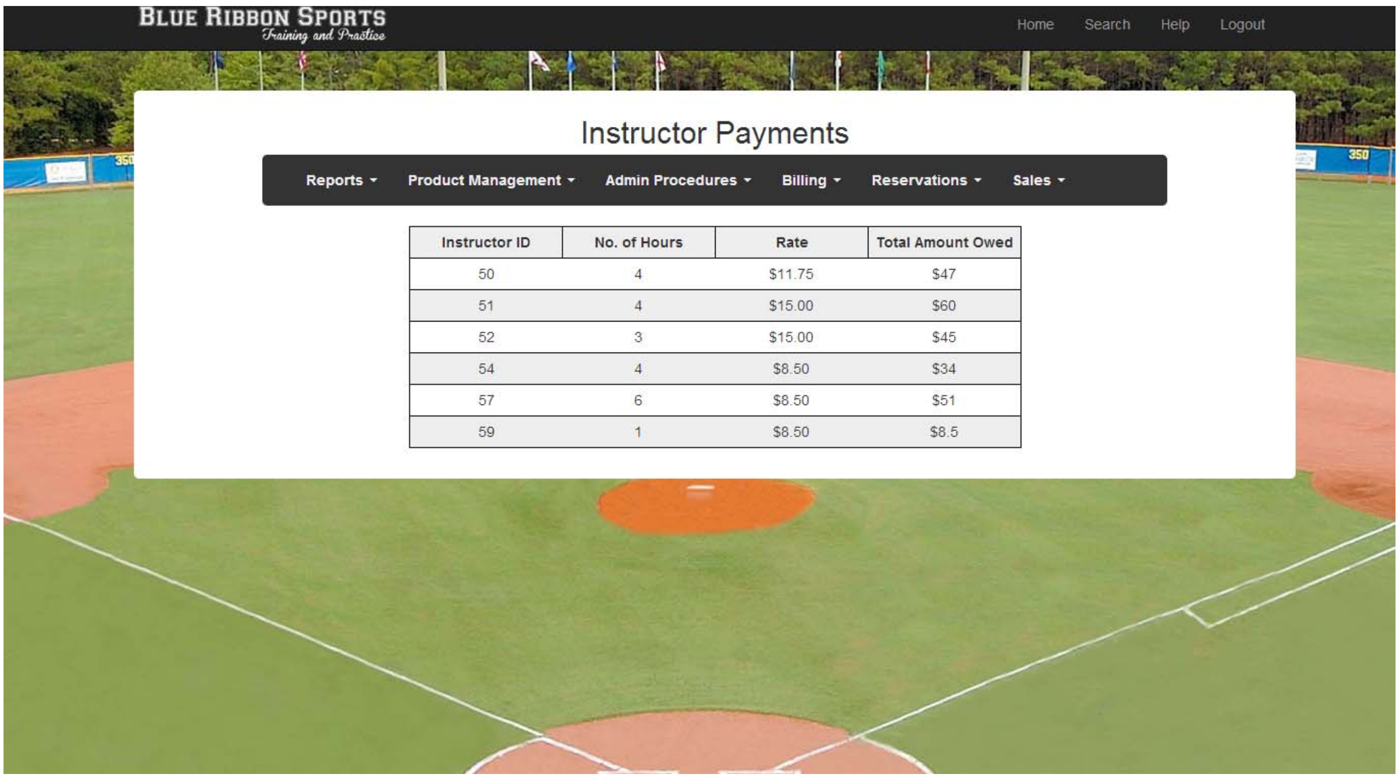


Vendor ID	No. of Orders	Tax Rate	Total Amount Owed
24	2	9%	$385.66
31	1	9%	$221.92
32	2	9%	$206.32
33	1	9%	$3.98

1. After selecting the Generate Vendor Payments script, the information will be displayed in table format on the screen.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

Instructor Payments

The Pay Instructors screen displays the Instructor ID, Number of Hours, Pay Rate and Total Amount Owed. This report will be forwarded to accounting to process payment.

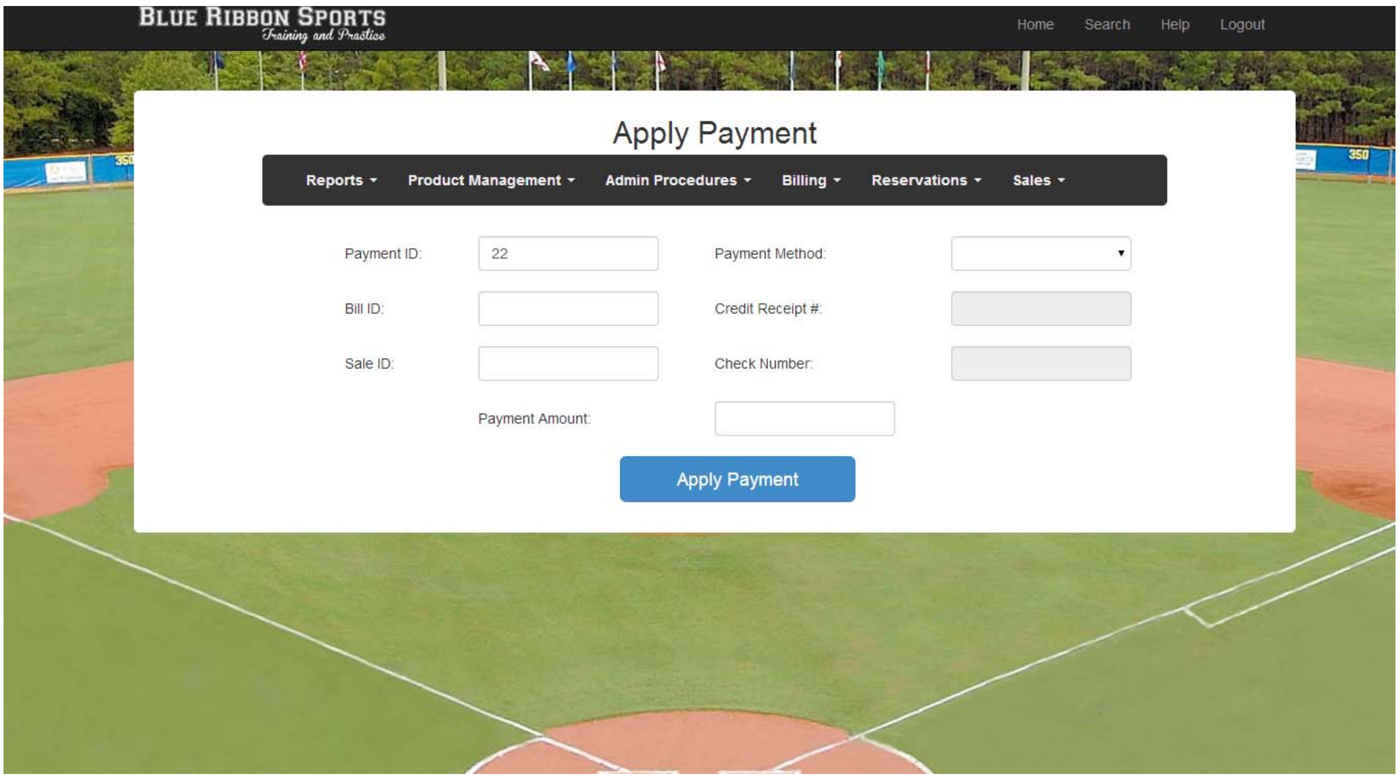


Instructor ID	No. of Hours	Rate	Total Amount Owed
50	4	$11.75	$47
51	4	$15.00	$60
52	3	$15.00	$45
54	4	$8.50	$34
57	6	$8.50	$51
59	1	$8.50	$8.5

1. After selecting the Generate Instructor Payments script, the information will be displayed in table format on the screen.
2. If the report needs to be printed, the browser's print function can be used to print to any attached printer.

Apply Payment

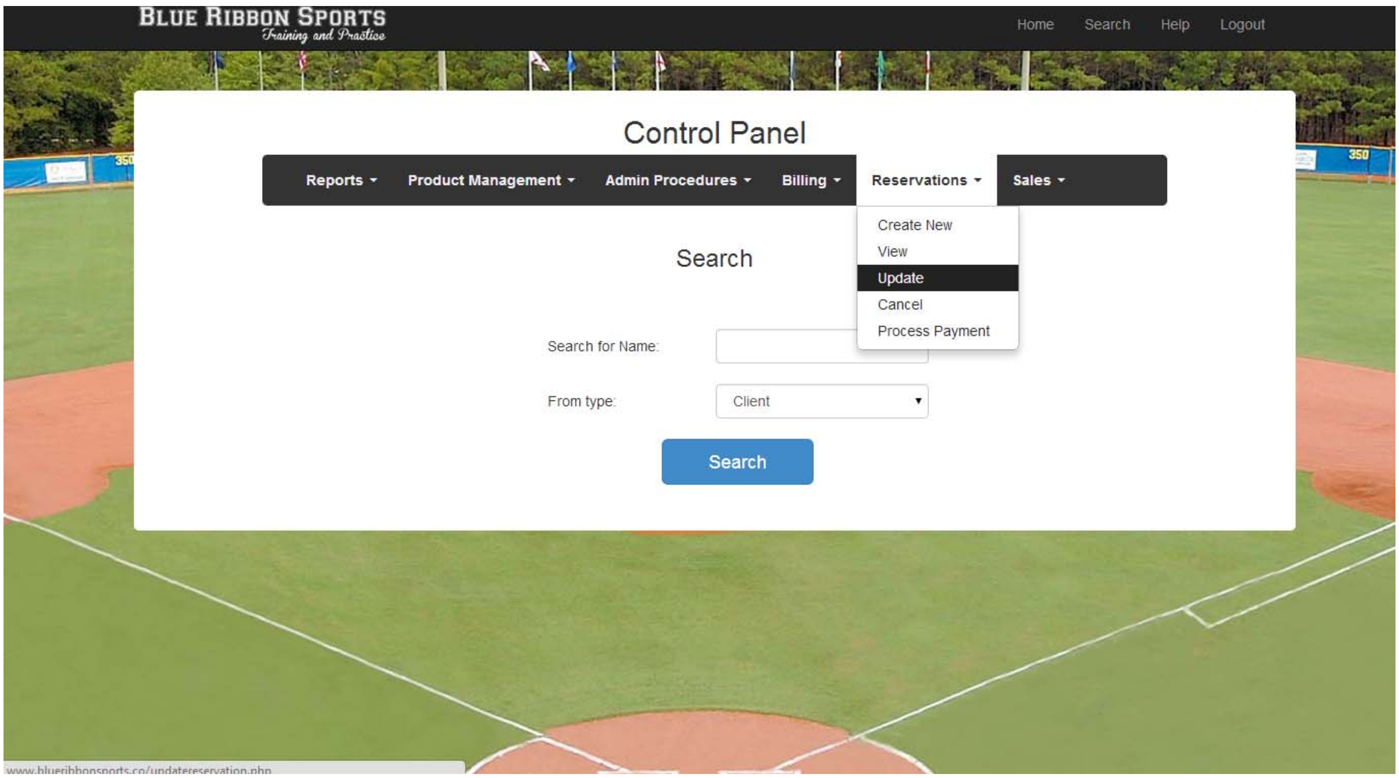
The Apply Payments screen allows for entry of payment received for an Invoice, Special Order or In-Stock Sale into the system.



1. The next available Payment ID will be populated into the form. You must then enter either the Bill ID or Sale ID, Payment Method, Payment Amount, and if the method is Check or Credit Card Number, the Check Number or Receipt Number.
2. Once the payment information has been entered, click Apply Payment.
3. If any required fields are left blank, you will be prompted to enter them before the Apply Payment button will work.

Navigation – Reservations

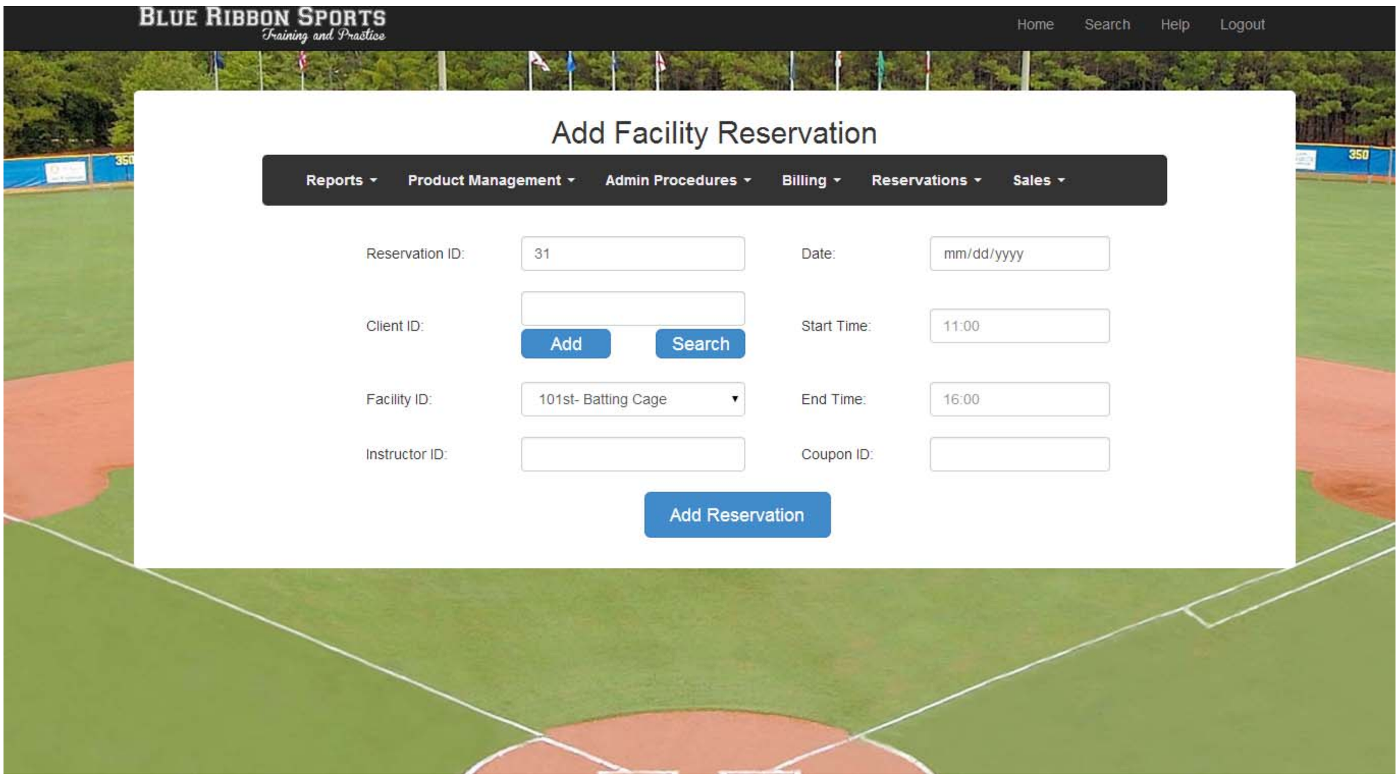
The Reservations section of the navigation bar provides access to the reservation functions contained within the system, such as creating and deleting reservations, broken down into five links.



1. To access the Reservations dropdown, click on Reservations on the Navigation bar.
2. If a small gray triangle is listed to the right of the item in the dropdown, it contains further menu options. Hover over the category to see more options.
3. Click on the desired page to navigate to it.

Add Reservation

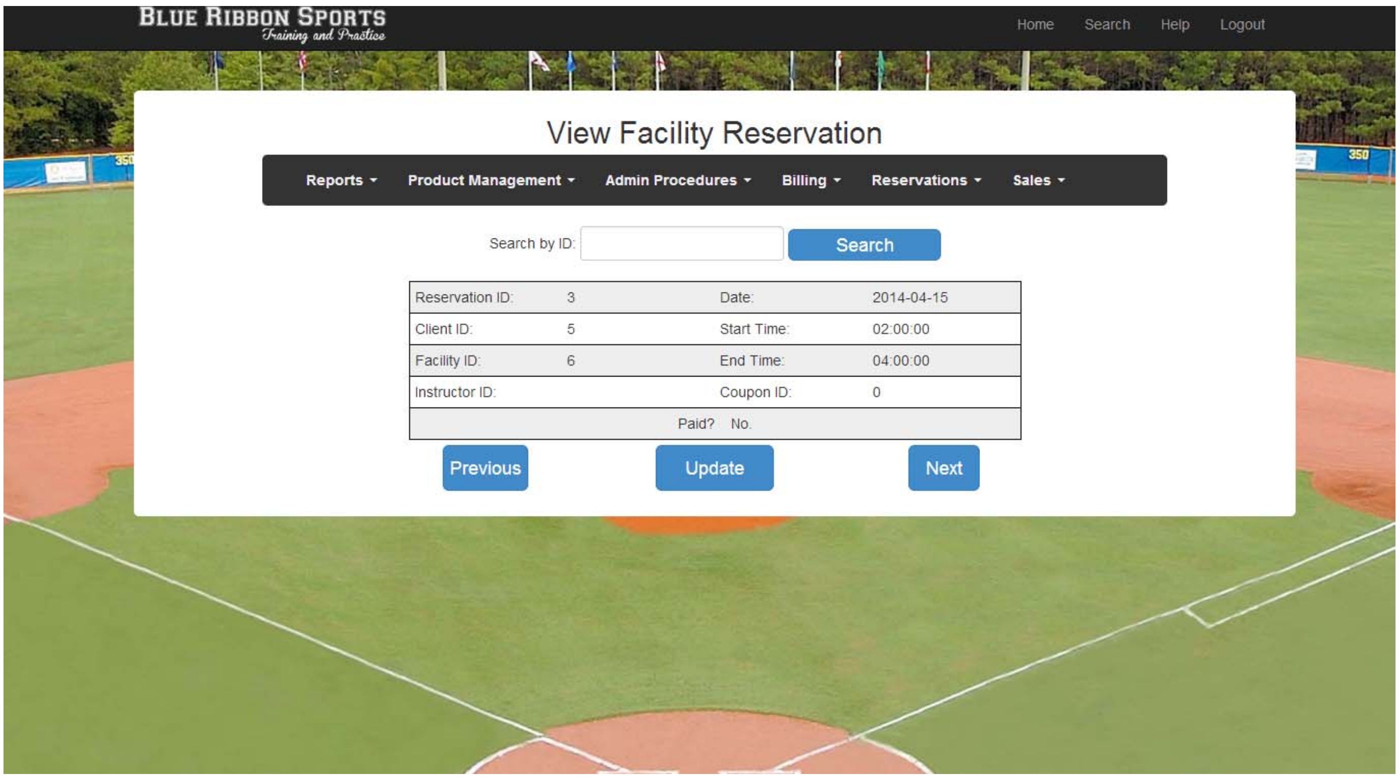
The Add Reservation screen allows for the entry of a new reservation into the system.



1. The next available Reservation ID will be populated into the form. You must then enter a Client ID, Facility ID, Date, Start Time, and End Time. If requested, an Instructor ID and Coupon ID can be entered to be applied to the reservation.
2. If the Client ID for the sale does not yet exist, click the "Add" button to be sent to the Add Client screen. If the user does not know their ID, click the Search button (See Page 101)
3. Once complete, click "Add Reservation" to create the Reservation.
4. If any required field is left blank, you will be prompted before you the Add Reservation button will function.

View Reservation

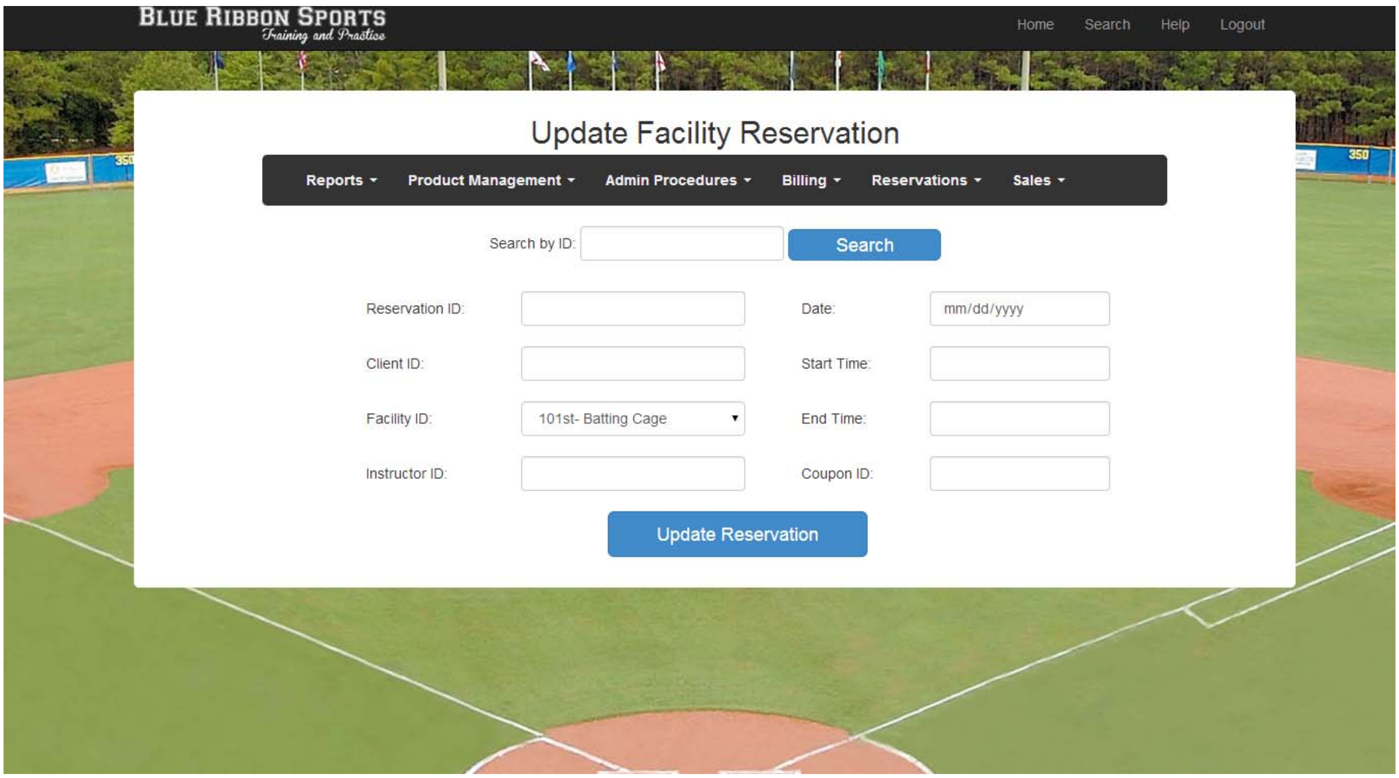
The View Reservation screen displays the Reservation ID, Facility ID, Reservation Date, Start Time, End Time, Client ID, Instructor ID (if applicable), Coupon ID (if applicable) and paid field for the selected reservation. From this screen you can navigate to the update reservation screen if needed.



1. To search for a specific reservation, enter the Reservation ID in the Search by ID field and click Search. To browse forward and backward through reservations, click on the Next and Previous buttons.
2. If the details of a selected reservation need to be updated, click on the Update button to be sent to the Update Reservation screen (Page 147) for this reservation.

Update Reservation

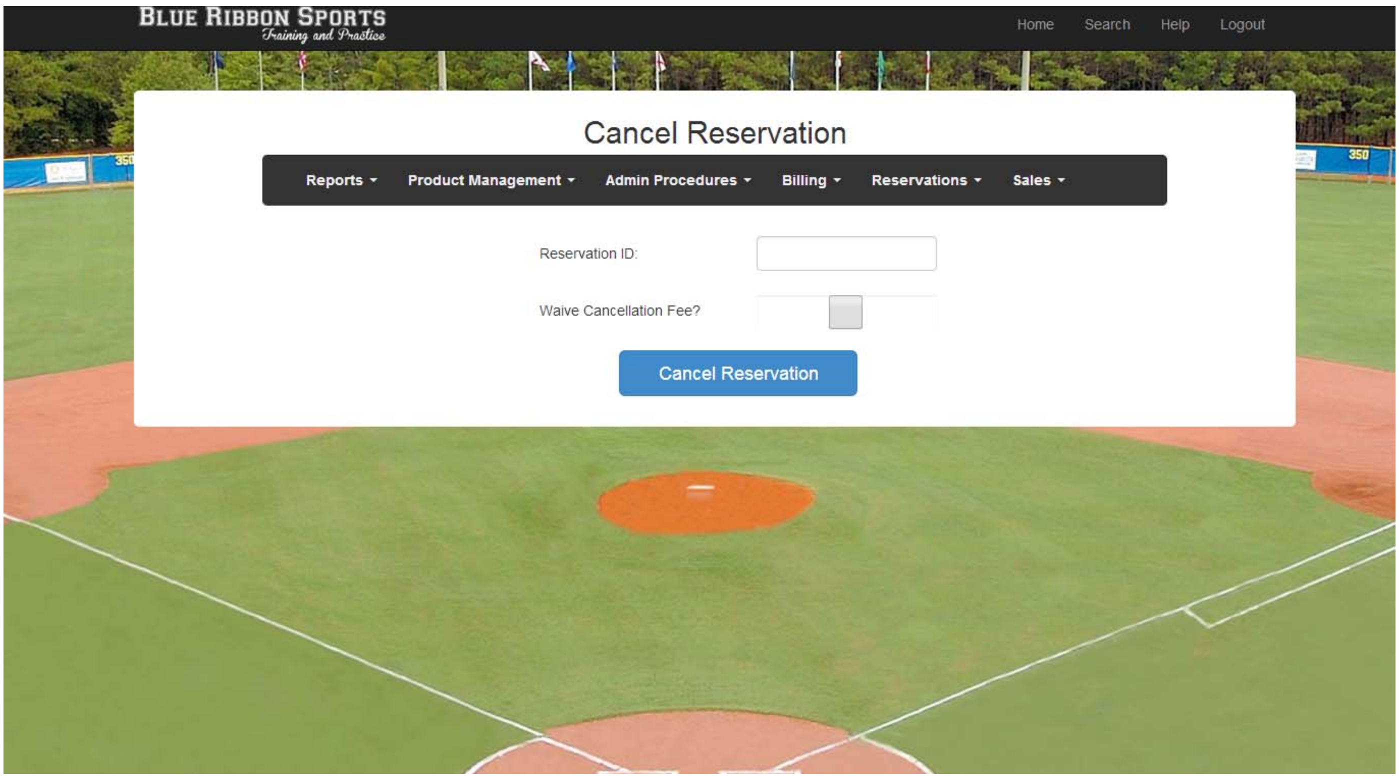
The Update Reservation screen displays the Reservation ID, Facility ID, Reservation Date, Start Time, End Time, Client ID, Instructor ID (if applicable), Coupon ID (if applicable) and paid field for the selected reservation in an editable format.



1. To update an existing reservation, enter the Reservation ID in the “Search by ID” field and click “Search.”
2. The Reservation’s current information will be loaded into the form.
3. Perform any required updates and then click Update Reservation.
4. If any required fields are left blank, you will be prompted to enter them before the “Update Reservation” button will work.

Cancel Reservation

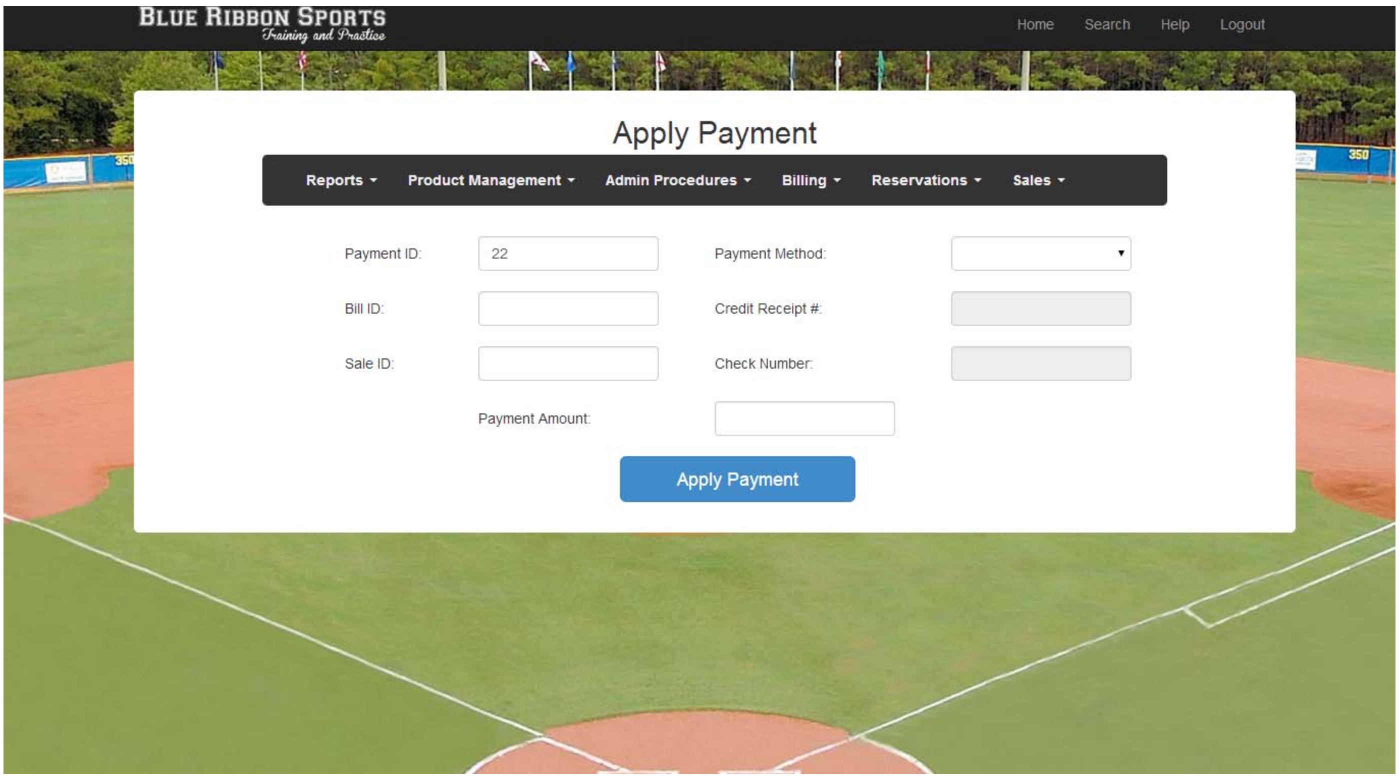
The Cancel Reservation screen allows for deleting (canceling) an existing reservation



1. To cancel a reservation, enter the Reservation ID into the Reservation ID field.
2. If the system should ignore generating of cancellation fees, check the Waive Cancellation Fee box.
3. Once completed, click the Cancel Reservation button.
4. If the Reservation ID is not entered, you will be prompted to enter a value before the Cancel Reservation button will work.

Apply Payment

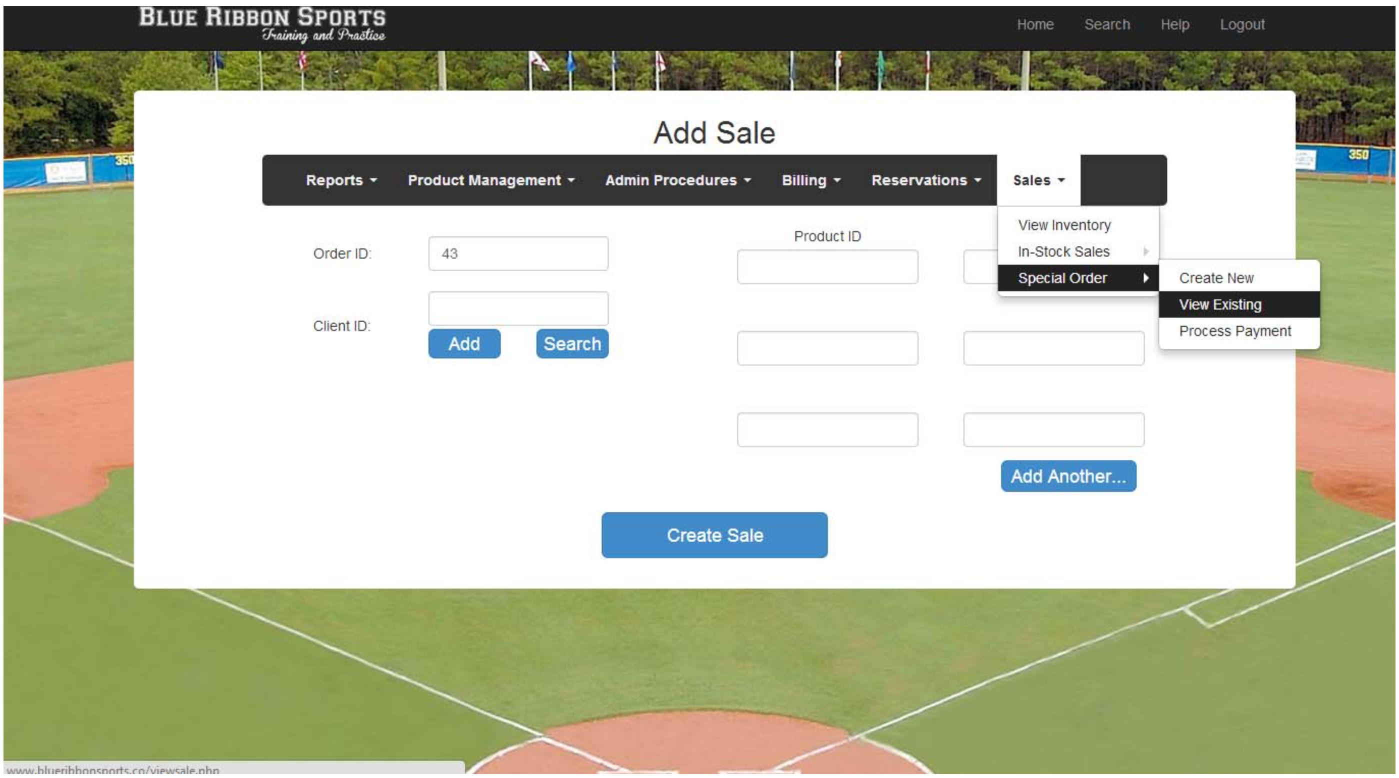
The Apply Payments screen allows for entry of payment received for an Invoice, Special Order or In-Stock Sale into the system.



1. The next available Payment ID will be populated into the form. You must then enter either the Bill ID or Sale ID, Payment Method, Payment Amount, and if the method is Check or Credit Card Number, the Check Number or Receipt Number.
2. Once the payment information has been entered, click Apply Payment.
3. If any required fields are left blank, you will be prompted to enter them before the Apply Payment button will work.

Navigation – Sales

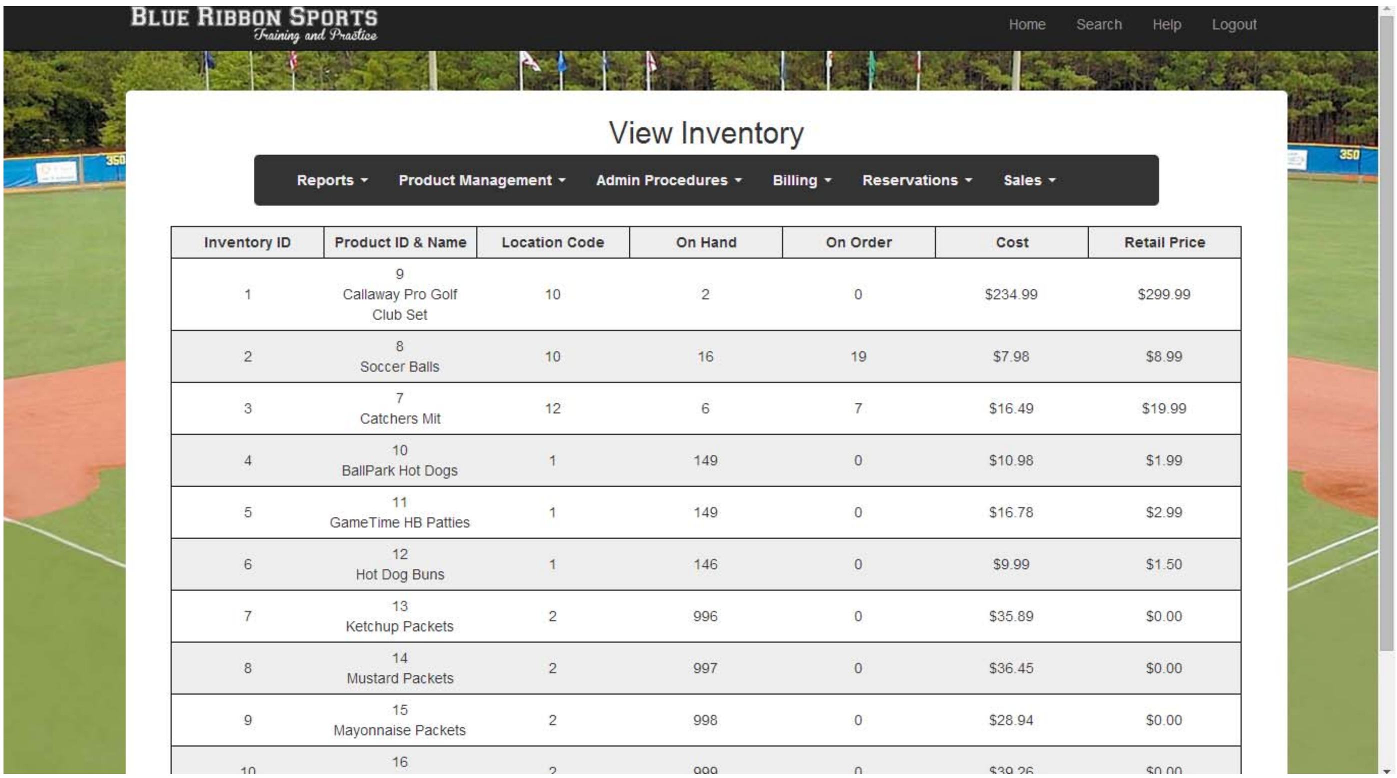
The Sales section of the navigation bar provides access to the sales functions contained within the system, such as creating sales and processing payments, broken down into one link and two categories.



1. To access the Sales dropdown, click on Sales on the Navigation bar.
2. If a small gray triangle is listed to the right of the item in the dropdown, it contains further menu options. Hover over the category to see more options.
3. Click on the desired page to navigate to it.

View Inventory

The View Inventory screen list the Inventory ID, Product ID & Name, Location Code, Quantity on Hand, Quantity on Order, Cost and Retail Price for all items.

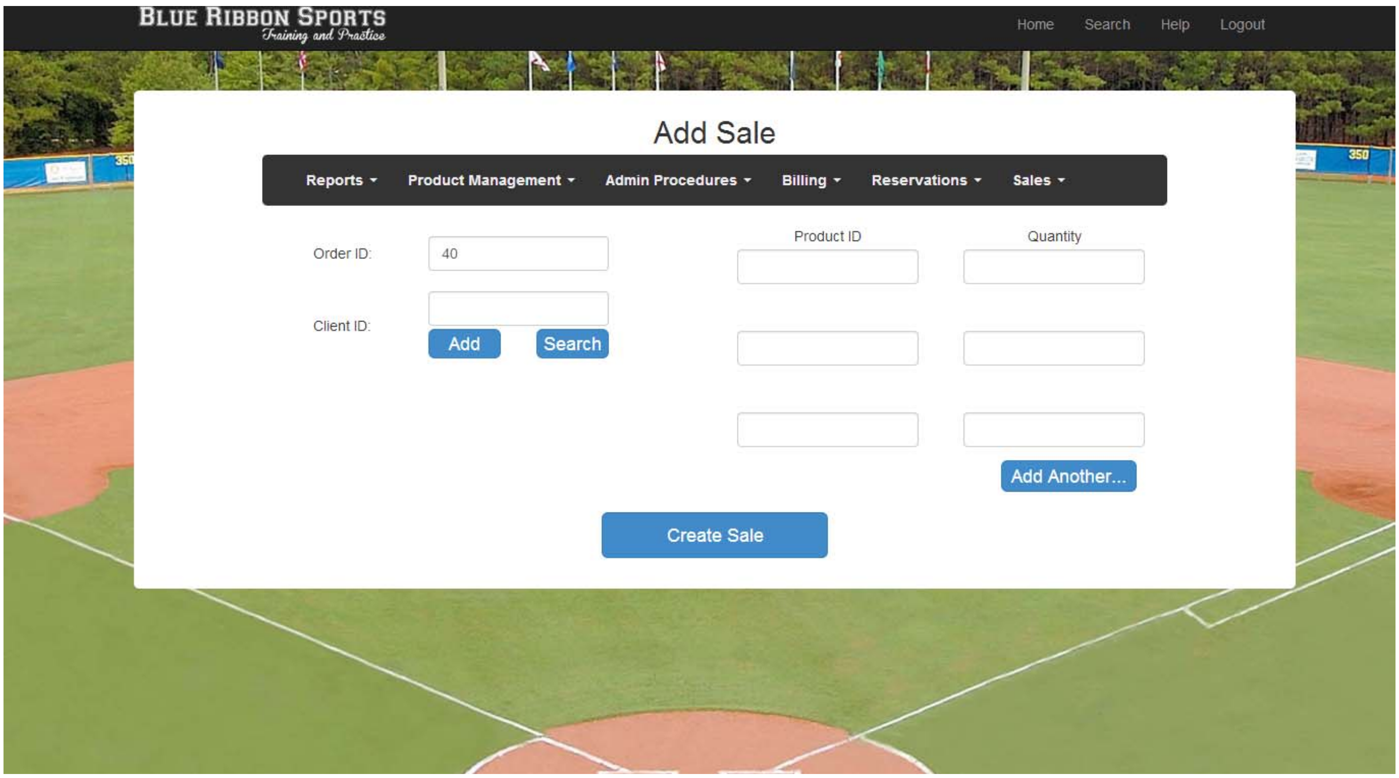


Inventory ID	Product ID & Name	Location Code	On Hand	On Order	Cost	Retail Price
1	9 Callaway Pro Golf Club Set	10	2	0	$234.99	$299.99
2	8 Soccer Balls	10	16	19	$7.98	$8.99
3	7 Catchers Mit	12	6	7	$16.49	$19.99
4	10 BallPark Hot Dogs	1	149	0	$10.98	$1.99
5	11 GameTime HB Patties	1	149	0	$16.78	$2.99
6	12 Hot Dog Buns	1	146	0	$9.99	$1.50
7	13 Ketchup Packets	2	996	0	$35.89	$0.00
8	14 Mustard Packets	2	997	0	$36.45	$0.00
9	15 Mayonnaise Packets	2	998	0	$28.94	$0.00
10	16	2	999	0	$39.26	$0.00

1. The information will be displayed in table format on the screen 10 inventory items at a time.
2. To navigate through the inventory 10 items at a time, use the Next and Previous buttons.
3. If the inventory needs to be printed, the browser's print function can be used to print to any attached printer.

Add New Sale

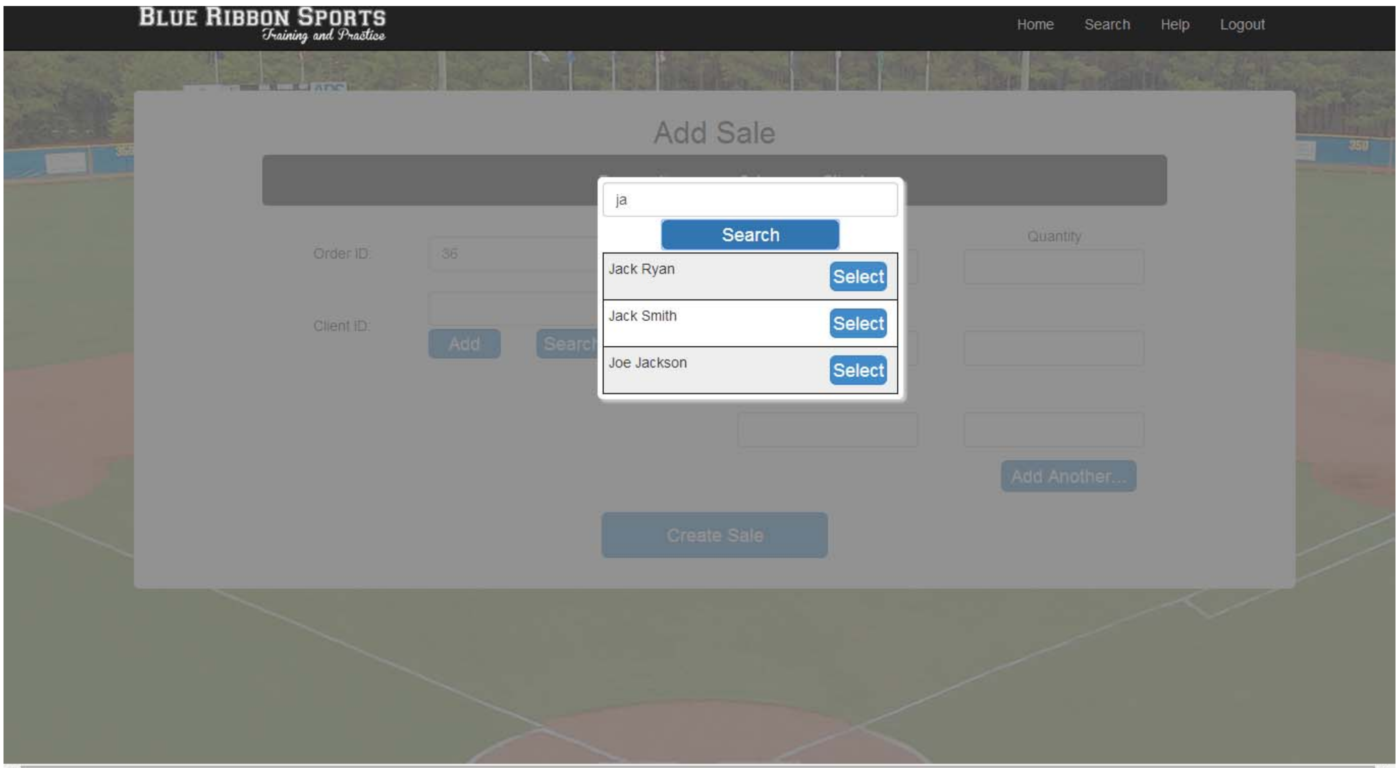
The Add New Sale screen allows for the entry of a new merchandise sale.



1. The next available Order ID will be populated into the form. You must then enter a Client ID and at least one Product ID and Quantity to be sold. The Product Name will be displayed below the Product ID once entered.
2. If the Client ID for the sale does not yet exist, click the “Add” button to be sent to the Add Client screen. If the user does not know their ID, click the Search button (See Page 153)
3. To add more than 3 items to a sale, click the “Add Another” button to add more text fields for Product ID and Quantity entry.
4. Once complete, click “Create Sale” to create the sale.
5. If any required field is left blank, you will be prompted before you the Create Sale button will function.

Add New Sale Client Search

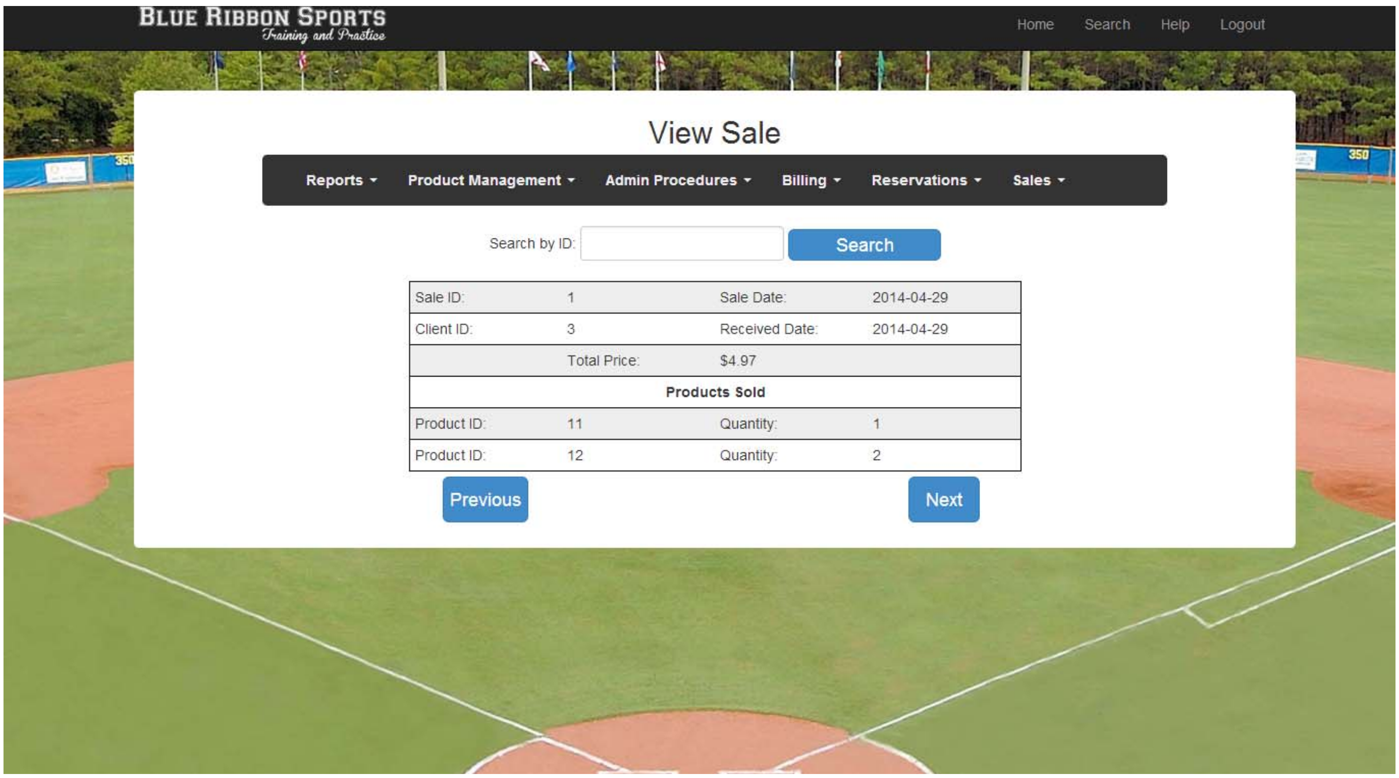
The Add New Sale Client Search allows for searching for an existing Client ID when creating a new sale.



1. After clicking the Search button, a search field and button will appear.
2. Type in the name of the desired client and click Search.
3. A list of matching clients will be displayed. To enter the matching ID for the desired client, click the Select button next to that client's name.

View Sale

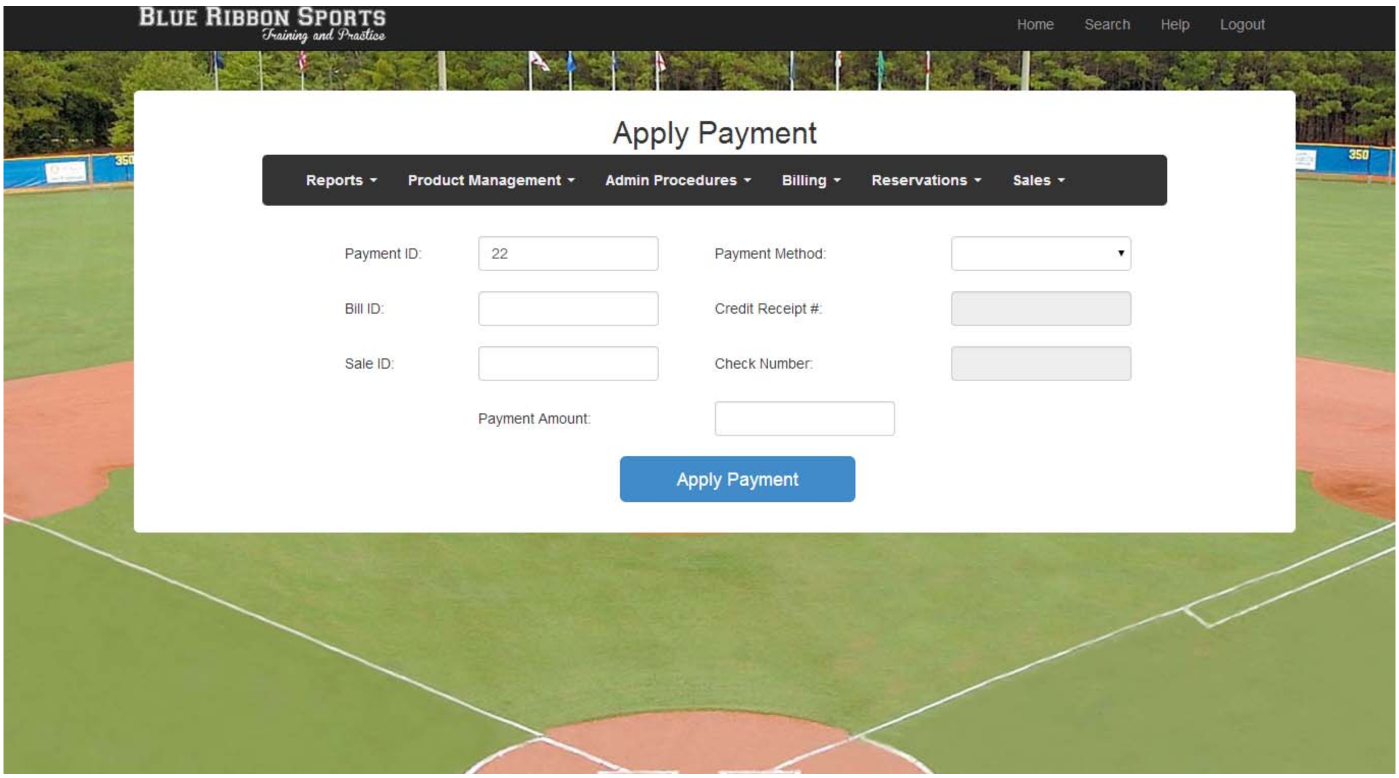
The View Sale screen displays the Sale ID, Sale Date, Client ID, Sale Date, Received Date, Total Price, Product ID and Quality for the selected sale.



1. To search for a specific sale, enter the Sale ID in the Search by ID field and click Search. To browse forward and backward through sales, click on the Next and Previous buttons.
2. For Special Orders, if the sale does not have a Sale Fulfilled date, the Mark Fulfilled button will be displayed.
3. If the sale has been fulfilled, click on Mark Fulfilled to enter the Sale Fulfilled date for this order.

Apply Payment

The Apply Payments screen allows for entry of payment received for an Invoice, Special Order or In-Stock Sale into the system.



1. The next available Payment ID will be populated into the form. You must then enter either the Bill ID or Sale ID, Payment Method, Payment Amount, and if the method is Check or Credit Card Number, the Check Number or Receipt Number.
2. Once the payment information has been entered, click Apply Payment.
3. If any required fields are left blank, you will be prompted to enter them before the Apply Payment button will work.

Blue Ribbon Sports

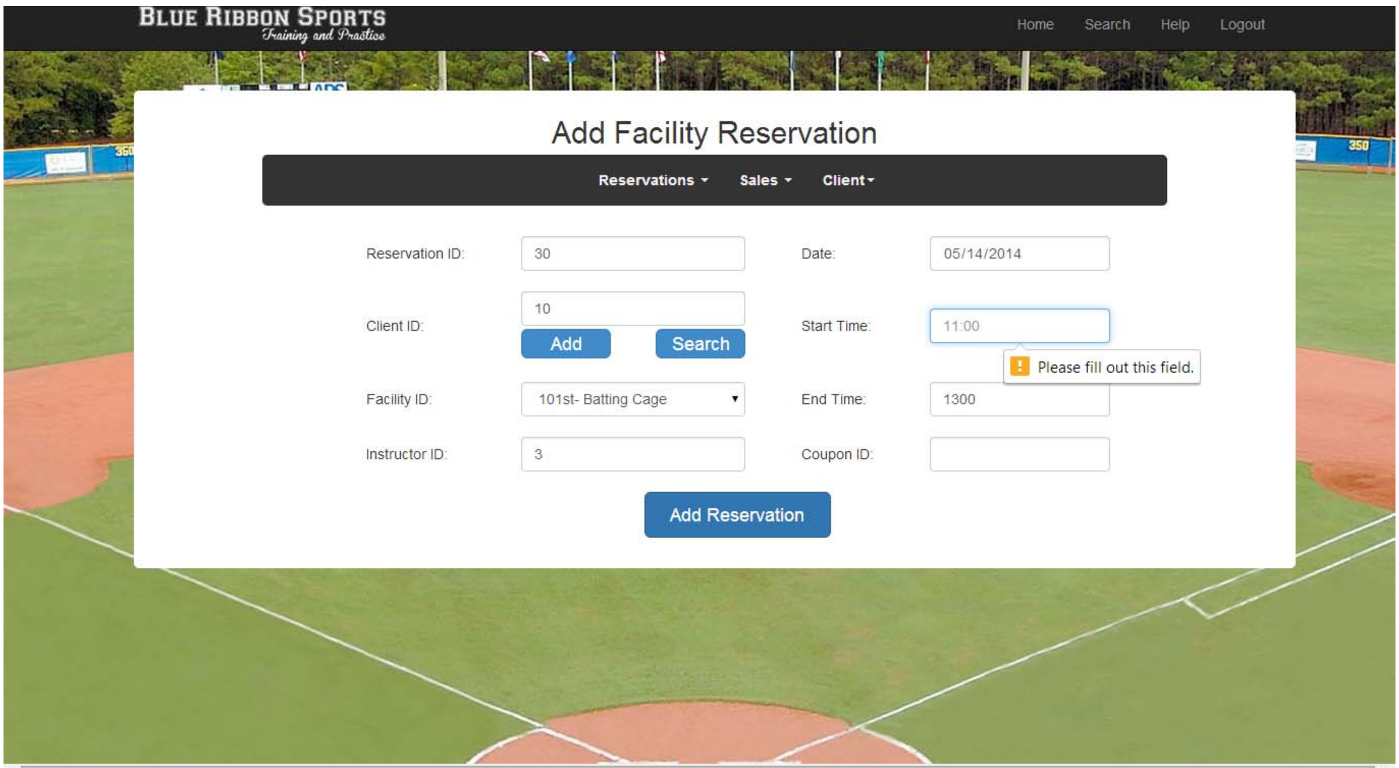
Training and Practice

System User Manual

Troubleshooting and Errors

Required Fields

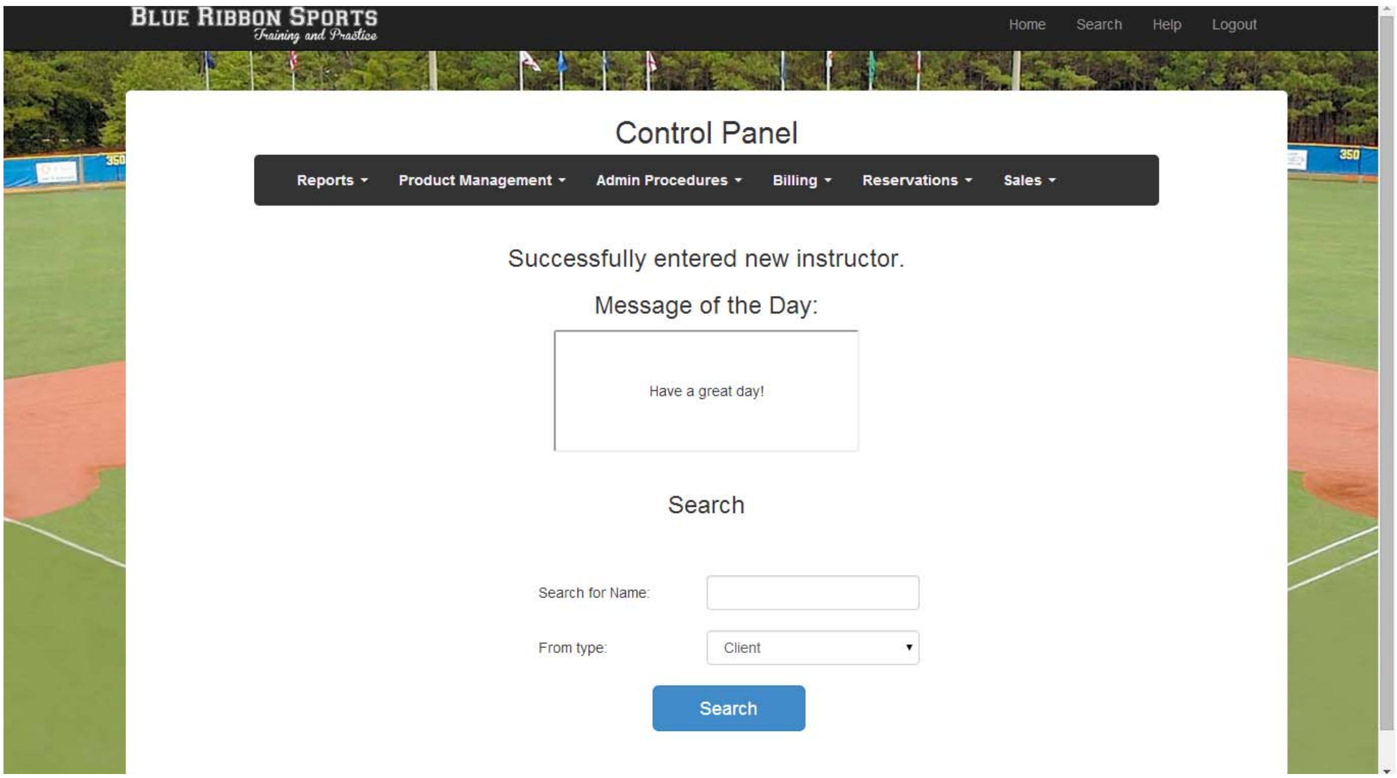
All pages have fields that are required before they can be submitted. If you attempt to submit any form without one of the required fields, a message will be displayed that says “Please fill out this field.” The Add or Update button for the page will not allow the form to be submitted until a value is entered.



1. If you click on the Add, Update, or Cancel button on any screen and are not taken to the Control Panel, review the form and look for any highlighted fields that says “Please fill out this field.”
2. If all required fields are filled out, and/or the button does nothing but no dialog box is displayed, reload the page.
3. If you are still unable to submit, log out and restart your browser.
4. If the form still will not submit with proper values, contact Prime System Solutions.

Creation Success

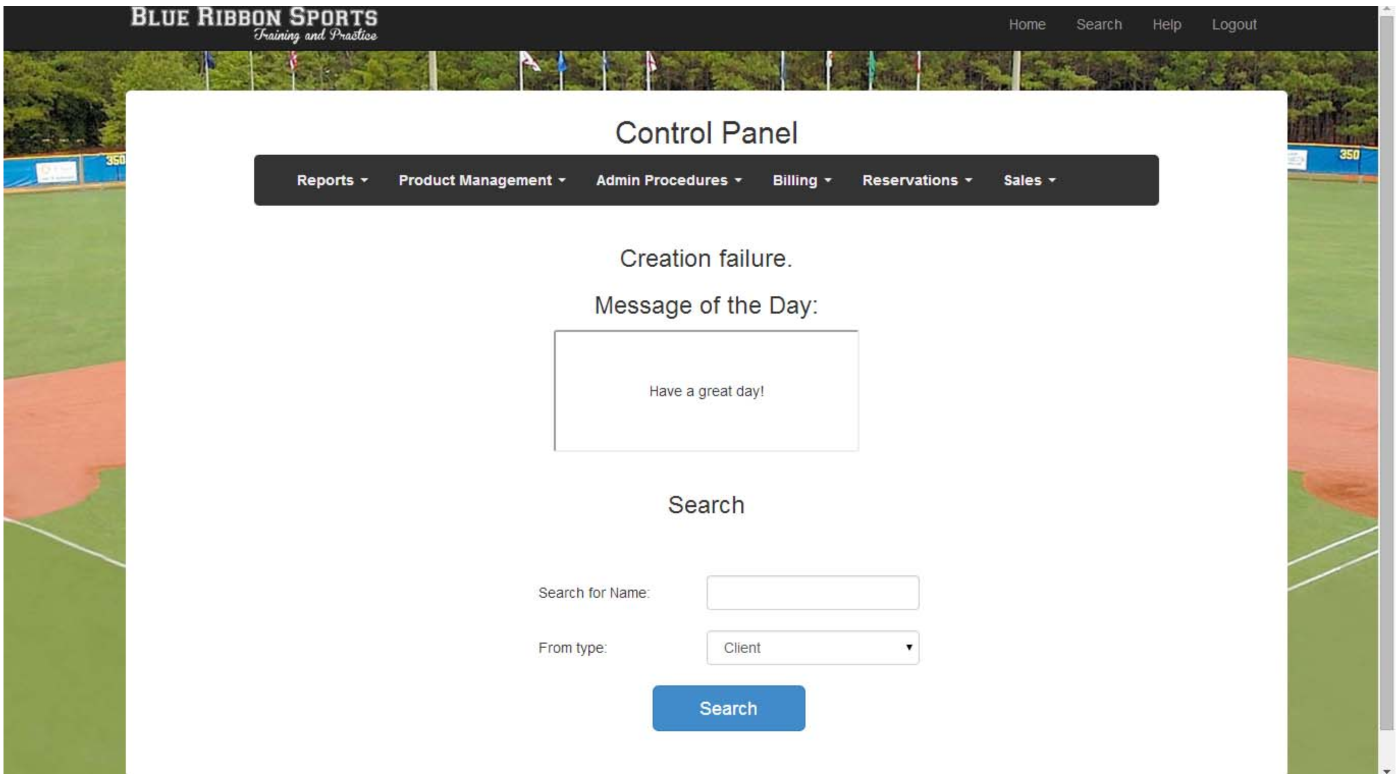
Any time a new record is created, whether it is a contract, client, or instructor, the user will be returned to the Control Panel page. A message should be displayed that shows that the record has been successfully created.



1. No steps should be necessary. This is an affirmative screen that confirms record creation.

Creation Failure

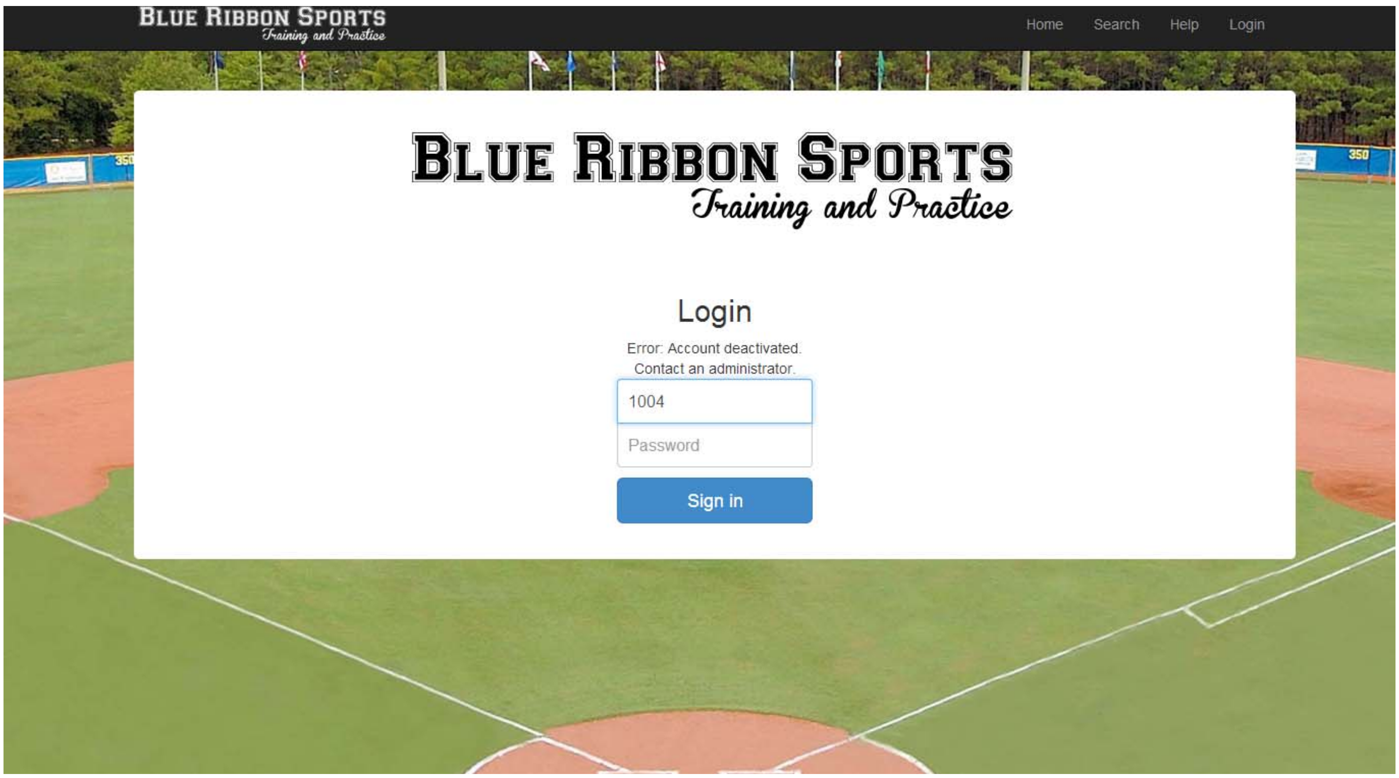
If a user is attempting to create a record and an error occurs during the database entry process, the user will be returned to the control panel with a Create or Update Failure message.



1. If creating a record, return to the page you were attempting to create a record for and try again. Confirm that all data has been entered correctly and that you have not altered the provided new item ID.
2. If Updating a record, make sure that you have not altered the ID or a key field to a value that does not match or is unavailable, for example a Client ID that is changed to 13 but a Client with ID 13 already exists, or a Client whose Emergency Contact was set to 4, but no Emergency Contact with an ID of 4 exists.
3. Log out, restart the browser, and attempt the operation again.
4. If possible, have someone else attempt the operation on their workstation.
5. If the problem persists, contact Prime System Solutions.

Login Timeout/Terminated

The Login screen will return error messages regarding a user's login status. If a user logs in and does not perform any actions on the site for thirty minutes, they will be logged out and receive a message that their session has timed out. If an employee has been set to status "Terminated" by a manager, they will receive a message that their account has been deactivated. A manager must change their account information to fix this problem.



1. Try typing your Employee ID and Password again.
2. If you still receive a message that your ID and/or password are incorrect, restart your browser and try to access the system again.
3. If you are still unable to log in, contact a Manager to have your password changed.
4. If you receive the Account Deactivated message, you must contact a Manager to have them set your account back to a non-terminated status.
5. If a user has had their password changed, or status set to something other than terminated, and is still receiving an error, contact Prime System Solutions.