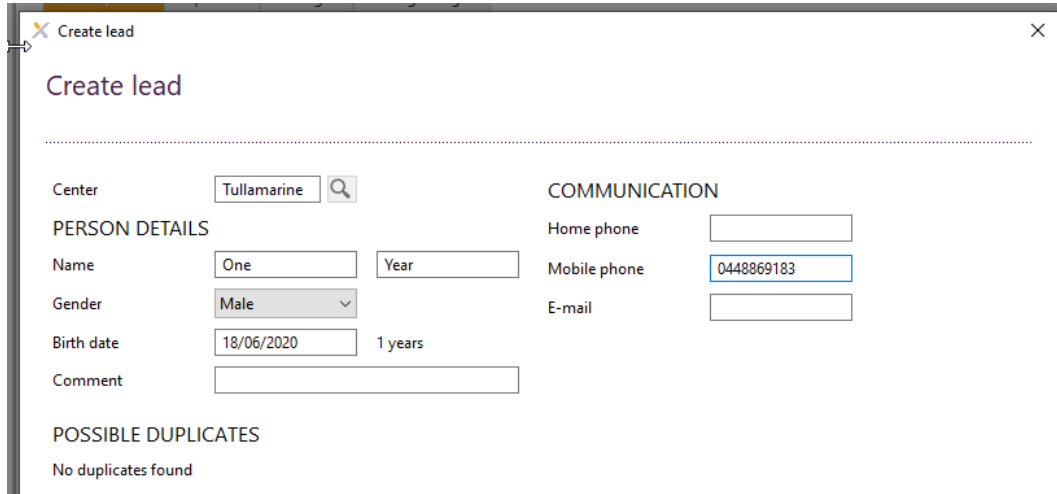


Childcare Training Manual

How to set up a child in Exerp and link it to the member.

1. Use the New Lead button to create a new profile in Exerp
2. You will need to enter the first & last name, gender and DOB of the child. PLEASE NOTE: You will need to enter the mobile number of the mum in the mobile phone field for the child.



The screenshot shows a web application window titled "Create lead". The form is divided into several sections:

- Center:** A dropdown menu showing "Tullamarine" with a search icon.
- PERSON DETAILS:**
 - Name:** Two input fields, the first containing "One" and the second labeled "Year".
 - Gender:** A dropdown menu showing "Male".
 - Birth date:** An input field containing "18/06/2020" and a "1 years" label.
 - Comment:** A text input field.
- COMMUNICATION:**
 - Home phone:** An empty input field.
 - Mobile phone:** An input field containing "0448869183".
 - E-mail:** An empty input field.
- POSSIBLE DUPLICATES:** A section with the text "No duplicates found".

3. Uncheck the box for email communication – this is not required for setting up a child.
4. Skip past the postal information screen & lead questionnaire phase.
5. Select the person type FAMILY. When you have chosen this person type it will prompt you to search for the MUM who is a member.

Create lead

Relation

☐ Private
☐ Student
☐ Staff
☐ Friend
☐ Corporate
☐ One man corporate
☒ **Family**
 Available to people that have the same home address as another active member at the club. Can be configured to require documentation. If a person is in family with others this will be shown on the persons relations-page.
 Family relation
☐ Senior
☐ Guest
☐ External staff

Previous **Finish** Cancel

PLEASE NOTE: This will not create a new lead or CRM task. These will sit as stand along child profiles that won't be counted towards lead totals etc.

Once you have linked up the Mother and the Child, you will be able to see this on their profiles via the Summary page or the relations tab.

Tahlia Childcare

Summary Details Membership Journal Account Booking Relations

INFO

Status	Active: member for 1 days (Tullamarine)
Accumulated membership	5 days
Person type	Private
Mobile phone	+61 4 4886 9183
Binding period	Person is within binding period
Deduction day	Thursday (Odd Weeks)

ID [321p16144](#)
 External ID [570472](#)
 Old system person id [ExMem-160613](#)

FAMILY

[One Year](#) (1)

To ensure we can book online for the child, we need to add them as a Friend for the Mum

1. In Exerp, go to the profile of the child and click on their Relations tab.
2. Click on the button **Add Friend**.

- Once you have added the mum as a friend, ensure you tick the box **Allow friends to book** in the bottom left corner. *We are looking at a way to automate this so clubs won't have to manage this step, however as a first phase please ensure you check this box.*

This is how a correct profile should look once linked the child with the mother.

One Year

SummaryDetailsMembershipJournalAccountBookingRelations

Referred by

Search

Counsellor

Search

Family member of

Tahlia Childcare

Person relations

Company relations

Transferred and duplicate

Relation type

All

☐ Include old

ID	Name	Type	Relation status	From date	To date
321p16144	Tahlia Childcare	My family	Active	18/06/2021 1:55 PM	
321p16144	Tahlia Childcare	My friends (member)	Active	18/06/2021 2:00 PM	

☒ Allow friends to book

Open

Create working list

Add child

Add friend

Remove friend

Setting up the Childcare Bookings in Exerp

- Ensure all of your childcare staff have been allocated the staff group Childcare in their staff profile in Exerp.
- Schedule your available childcare times in Exerp under the PLANNING App.
 - Menu > Planning > Childcare Calendar
 - Create Booking
 - Select the age group you are scheduling for. We have set the maximum number of children associated with these age groups in the back-end. The age groups will be in accordance to your club set up.

Create booking

Select resources

Which resource(s) will be used for this booking?

Room (Optional)

2 & Under

3 & Over

Next Cancel

- d. Choose the start time and duration of the Childcare session, choose if this is a recurring time slot or just a once off, choose the staff member who will be on shift and Finish.

PLEASE NOTE: When selecting the staff who are on shift, please select only one staff member for the 2 & Under Group and the other staff member working for the 3 & Over group. You will receive an error if you try to use the same staff member at the same time across both age groups.

- e. Once you have planned your childcare times, make sure you **activate your bookings**.
- f. You will need to do this schedule for each session time for both age groups – 2 & Under and 3 & Over.

Albury

Today

June 2021

SEARCHES

CLASSES

Childcare Sessions

Test Calendar

FIT30

Group Fitness

Reformer Pilates

CHILD CARE SESSIONS

2 & Under

3 & Over

FRI 25 JUN Resource (0)

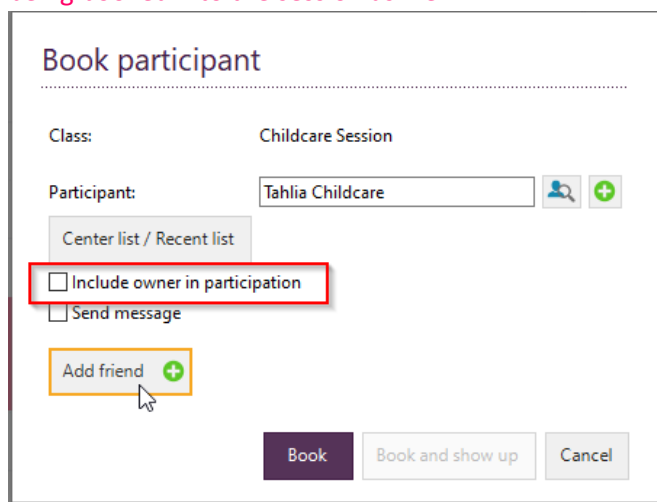
Time	2 & Under	3 & Over
9:00 AM	Childcare Session 0:00 9:00 AM, Belinda Ralph, 2 & Under	Childcare Session 0:00 9:00 AM, Tahira Day, 3 & Over
10:00 AM	Childcare Session 0:00 10:30 AM, Tahira Day, 2 & Under	Childcare Session 0:00 10:30 AM, Belinda Ralph, 3 & Over
11:00 AM		
12:00 PM		
1:00 PM		
2:00 PM		
3:00 PM		
4:00 PM		
5:00 PM	Childcare Session 0:00 5:00 PM, Belinda Ralph, 2 & Under	Childcare Session 0:00 5:00 PM, Tahira Day, 3 & Over

Booking a child into Childcare via Exerp

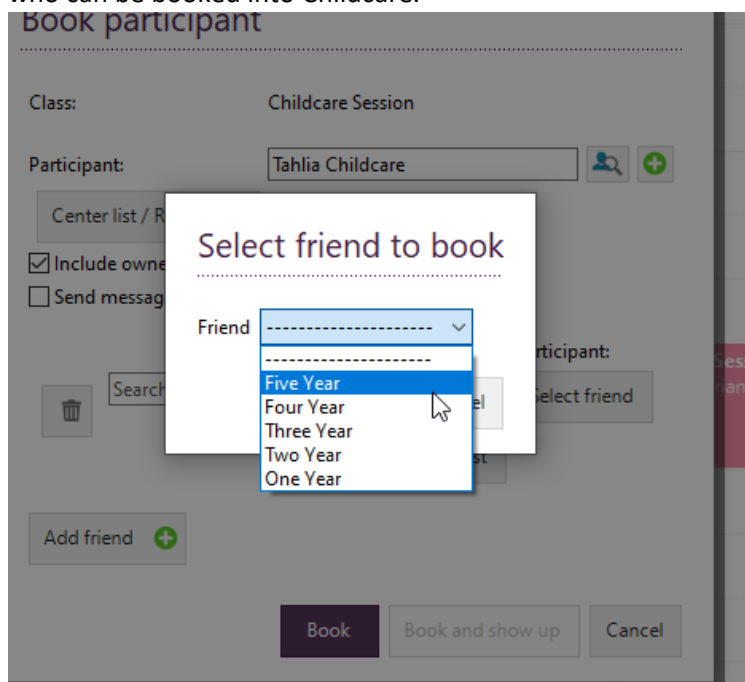
- Go to the CALENDAR App in Exerp > ROOMS > CHILDCARE and find the date you are wanting to book in the child.
- Double click on the session time and the correct age group and use BOOK PARTICIPANT.

3. In the participant box search for the **mum** who is a member at the club.

PLEASE NOTE: You must untick the box for **“Include owner in participation”** as we don’t want the mother being booked into the session as well.



4. Use the **Add Friend button – Select Friend** and this will bring up all children that are linked to that member who can be booked into Childcare.



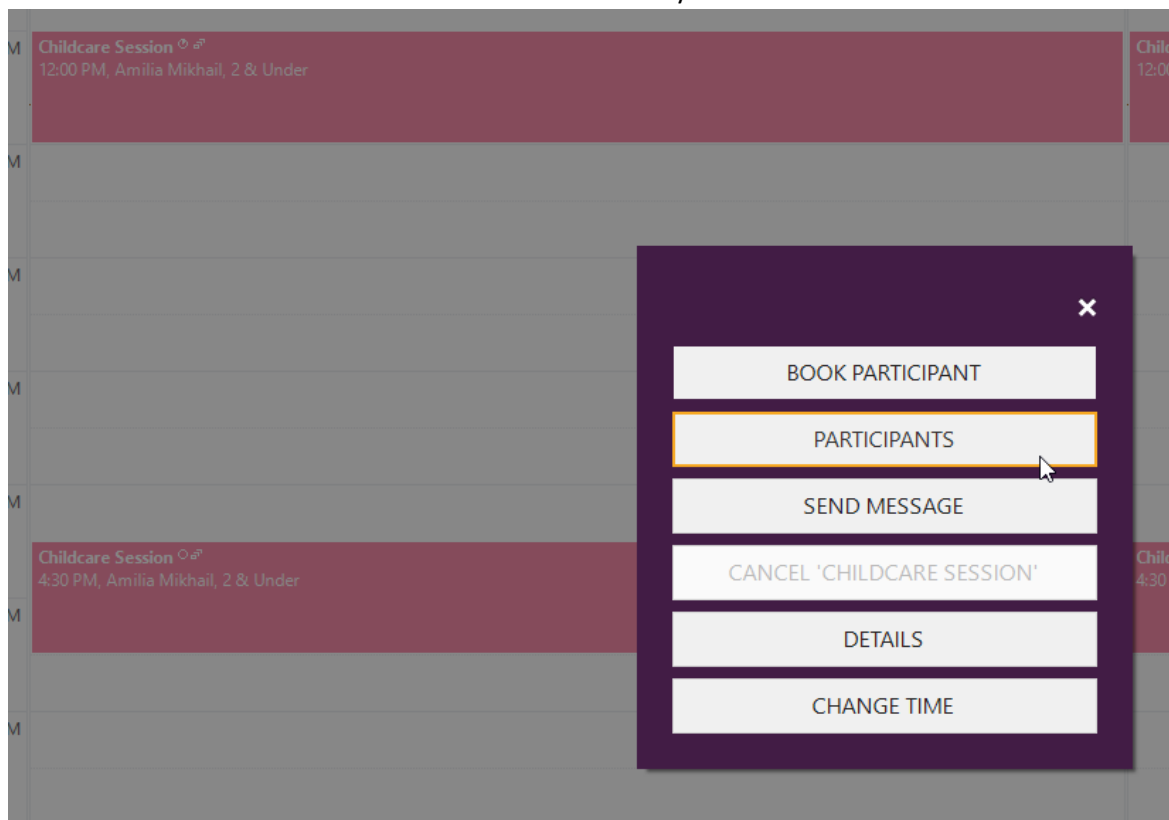
5. Choose the child’s name who is being booked into the session. You can do this multiple times if the Mum has multiple children in the same age group.
6. Click on **BOOK**.
7. This will book the child into the session and link it to both the mum and child’s profiles in Exerp, as well as come up on the app for the Mum to make changes too down the track if needed.

PLEASE NOTE: The booking window will be the same in Exerp for when the session times opens online for members. So, if you try to book a member in via Exerp 8 days in advance you will not be allowed to book in a child.

However, for cancellations, clubs will have the ability to override this when needed so that members are not charged if you don’t wish to charge them.

Cancelling a Child out of a Childcare Session

1. In Exerp, go to your Childcare calendar and go to the date and time of the session that the child is booked in for.
2. Double click on the session and select PARTICIPANTS so you can view the full list of children booked in.



3. Click on the child you are wanting to cancel out from the session so they are highlighted in orange and use the Remove Participant button.

Participation details

Capacities

Class capacity

Waiting list capacity

[Save](#)

Participations

#	Name	Status	Interface	Person ID
1	Two Year	Booked	Staff	321p22603

☒ Participating
 ☐ Waiting list
 ☒ Waiting list showup
 ☐ Cancelled
 ☐ Review

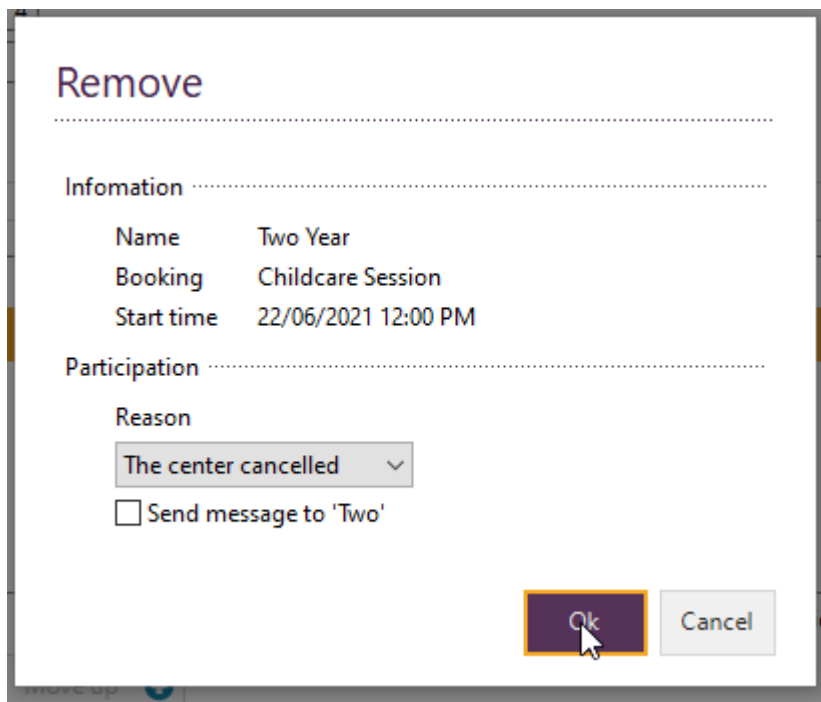
[Move down](#)
[Move up](#)

[Book](#)
[Remove participant](#)
[Showup](#)
[View](#)

[Working list](#)

[Close](#)

4. It will prompt you to select from the drop either “The centre cancelled” which will **not** charge the member, or if you select “the member cancelled” and it is inside the cancellation window the member will be charged the for their child’s session.



PLEASE NOTE: All members will receive a booking confirmation provided they have their mobile number listed on their child’s profile in Exerp.

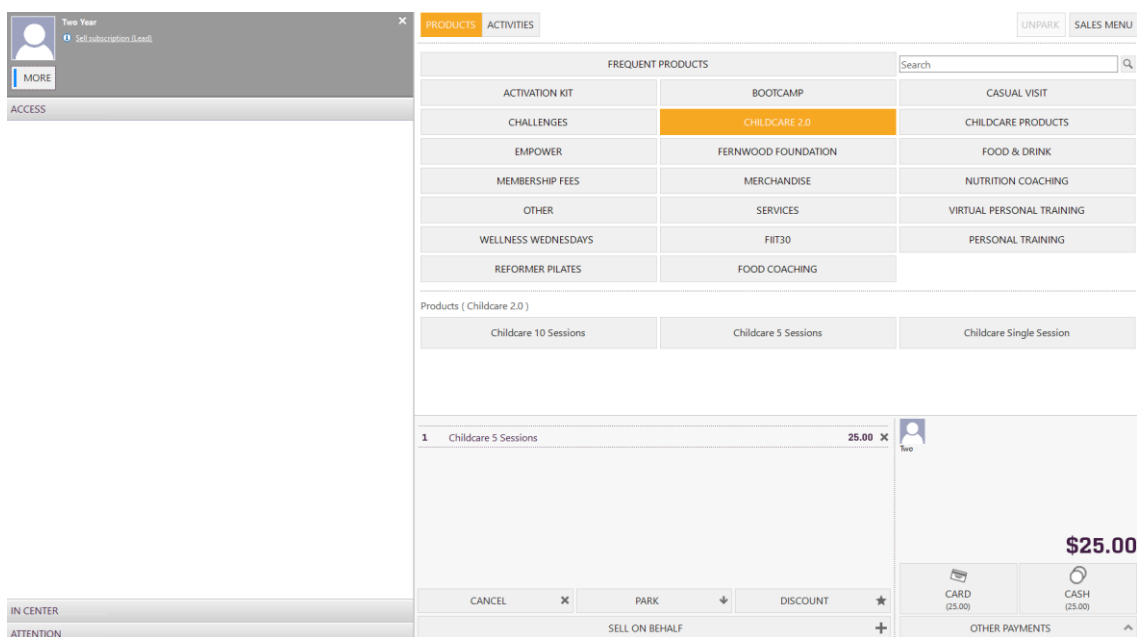
In the event the member makes a booking the day before the session is scheduled, there will be no SMS reminder as they have missed the event and it is presumed that they won’t require a reminder as they are booking the day before the start time.

The booking confirmation SMS will come through the day before their booking between 5-6pm in the evening.

“Hi Tahlia. A quick reminder that Billy is booked for Childcare tomorrow @ 9am. See you then!”

Purchasing Childcare via Exerp

1. Childcare can be purchased either through the online portal or via the Exerp client in club.
2. In club, purchases can be made to the mum’s profile who is a member at the club for any pack purchases.
3. All childcare products are available via the Front Desk in Exerp under CHILDCARE 2.0 and will reflect the club’s prices and offering.



4. Any clips that are available on the Mum's profile can be used as required across all of her children linked as a friend on their account. Each child when booked in to a session will deduct one clip.

Childcare bookings for clubs that don't charge their members

We have set up a Target Group in Exerp so basically any time a FAMILY profile is created for a child it will automatically give them the privilege to book in Childcare.

This is managed on a club by club basis and only clubs that have requested not to charge will be opted in for this setting. These clubs will not require to purchase any Childcare products on the members profile.

Childcare Online for Members

Members will be able to access their childcare bookings via MyFernwood through a tile embedded on the Fernwood App. This will allow the member to manage all of the following online:

- View & manage their childcare bookings
- Book in their kids to a childcare session
- Cancel their kids from booked childcare sessions
- Join a waitlist on any full childcare sessions they wish to attend
- Purchase childcare sessions with upfront with a credit card or added to their next DD for convenience
- Check their session balances for each of their kids

Booking Childcare Online – MyBookings

1. In MyFernwood, click on MyProfile > Book Childcare.

PLEASE NOTE: It will default to the MyBookings page when clicked on through the Fernwood App.

The screenshot shows a dark-themed profile page for 'Tahlia Childcare'. At the top, it says 'Profile' and 'Tahlia Childcare'. Below this is a table with two columns: 'Children' and 'Age'. The table lists five children: 'Five Year' (Age 5), 'Four Year' (Age 4), 'One Year' (Age 1), 'Three Year' (Age 3), and 'Two Year' (Age 2). A mouse cursor is pointing at the 'Two Year' entry. Below the table, there is a note: 'If a child that you registered does not appear in the list please contact your local club.' There are two buttons: 'BOOK CHILDCARE' (highlighted with a red box) and 'BUY CHILDCARE'. Below these are fields for 'Email' (tahlia@childcare.com), 'Phone' (None), 'Payment Method' (None. Please call your local club.), 'Home Club' (Tullamarine), and contact details: 'Unit 1/10 Carrick Drive TULLAMARINE VIC 3043' and '+61 3 9330 2499'. At the bottom, it says 'You have access to MyFernwood content'.

Children	Age
Five Year	5
Four Year	4
One Year	1
Three Year	3
Two Year	2

If a child that you registered does not appear in the list please contact your local club.

BOOK CHILDCARE

BUY CHILDCARE

Email
tahlia@childcare.com

Phone
None

Payment Method
None. Please call your local club.

Home Club
Tullamarine

Unit 1/10 Carrick Drive TULLAMARINE VIC 3043
+61 3 9330 2499

You have access to MyFernwood content

2. Members will be prompted to select the child they are booking the session for from the list of children linked to their profile.

The screenshot shows a 'Book Session' page. At the top, it says 'Book Session' and 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.' Below this is a pink bar with the text 'Select child'. Below the bar, there is a text prompt: 'Please select the child you are booking the childcare session for *'. There are five radio button options: 'Five 10 sessions available', 'Four 5 sessions available', 'One 5 sessions available', 'Three 5 sessions available', and 'Two 9 sessions available'. The 'Two 9 sessions available' option is selected, and a mouse cursor is pointing at it. Below the options are two buttons: 'Continue' (highlighted in pink) and 'Buy more sessions' (outlined in pink).

Book Session

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Select child

Please select the child you are booking the childcare session for *

☐ Five 10 sessions available

☐ Four 5 sessions available

☐ One 5 sessions available

☐ Three 5 sessions available

☒ Two 9 sessions available

Continue

Buy more sessions

- The childcare calendar will come up for them to choose which session time they are wanting to book their child in for.

Childcare booking for Two, age 2

See available spots in the timetable below and make a booking or join a waiting list.

Childcare age groups:

Baby 2 years & under

Toddler 3 years & over

Time slot	Monday 21/06/2021	Tuesday 22/06/2021	Wednesday 23/06/2021	Thursday 24/06/2021
	Previous			Next
04:30 pm - 05:30 pm	Available spots: 4 2 & Under 2 3 & Over Book	Available spots: 4 2 & Under 2 3 & Over Book	Available spots: 4 2 & Under 2 3 & Over Book	Available spots: 4 2 & Under 2 3 & Over Book

- Select the session time they are booking that child in for and click on BOOK. It will bring up a confirmation window to confirm the date and time for the session. Click on BOOK to confirm.

✕

Booking Summary

You're booking childcare for **Three** on **22/06/2021**
@ **04:30 pm - 05:30 pm.**

[Book](#)

[Cancel](#)

It will confirm the booking where they can either go back and view other bookings or book another session for that child or another child.

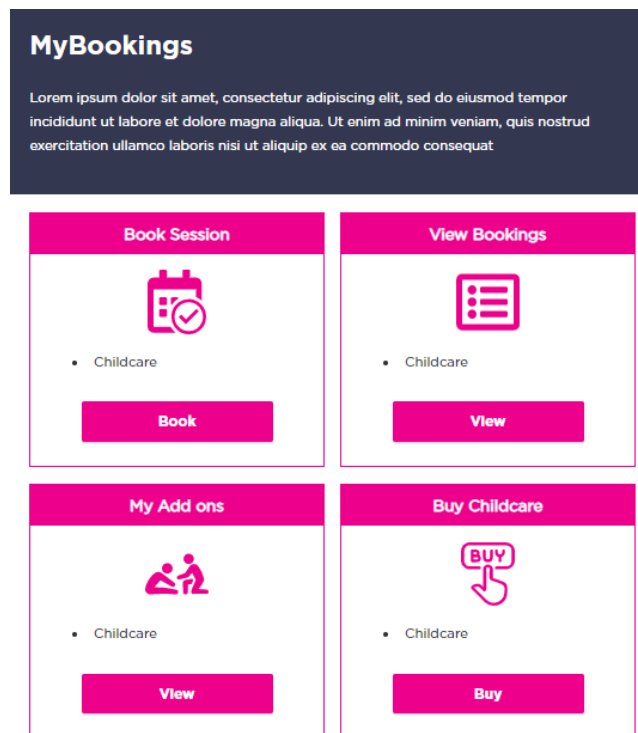
Booking Confirmation

You have booked childcare for **Three** on
22/06/2021 @ 04:30 pm - 05:30 pm.

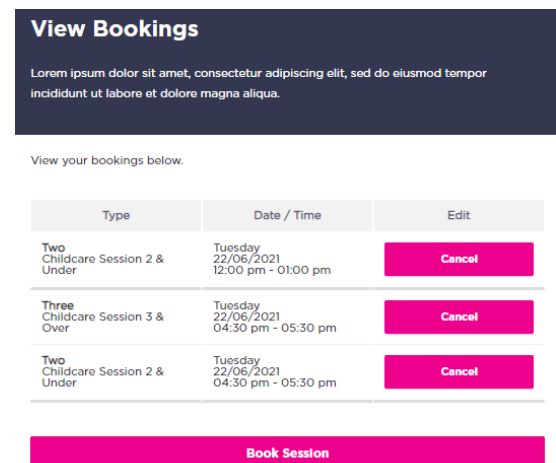
[View bookings](#)

[Book another](#)

View & Cancel your Childcare Bookings Online – MyBookings



1. Click on View Bookings
2. This will bring the full list of future childcare bookings for all children listed under their profile.
3. From here they can cancel any sessions that they can no longer attend or be redirected to book another session.
4. To cancel a session, simply click on the Cancel button. Members will then be prompted to confirm the cancellation.
5. Depending on the cancellation window that the club has in place will dictate the time cut off that they can cancel their bookings online before having to contact the club.



PLEASE NOTE: Any clubs that have cancellation policies in place, the member will be charged for the session as if they were a no show, unless the club overrides this.

Join the Waitlist

When the Childcare Session is full, members will be able to join the waiting list for that session.

Where there is usually a BOOK button, it will be a JOIN WAITING LIST button as picture below.

Time slot	Monday 21/06/2021	Tuesday 22/06/2021	Wednesday 23/06/2021	Thursday 24/06/2021
	Previous			Next
04:30 pm - 05:30 pm	Available spots: 4 2 & Under 2 3 & Over Book	Available spots: 3 2 & Under 0 3 & Over Join waiting list	Available spots: 4 2 & Under 2 3 & Over Book	Available spots: 4 2 & Under 2 3 & Over Book
12:00 pm - 01:00 pm		Available spots: 3 2 & Under 2 3 & Over Book	Available spots: 4 2 & Under 2 3 & Over Book	Available spots: 4 2 & Under 2 3 & Over Book
09:00 am - 10:00 am				

The waiting list will work like a queue and when/if another child is cancelled from the session in the same age group, they will be bumped into the session if they are number one in the queue. This can happen right up until the start time of the session.

In the MyBookings Section, members will be able to see which childcare sessions they are on the waiting list for.

View your bookings below.

Type	Date / Time	Edit
Two Childcare Session 2 & Under	Tuesday 22/06/2021 12:00 pm - 01:00 pm	Cancel
Five Childcare Session 3 & Over	Tuesday 22/06/2021 04:30 pm - 05:30 pm	On waiting list Cancel
Four Childcare Session 3 & Over	Tuesday 22/06/2021 04:30 pm - 05:30 pm	Cancel
Three Childcare Session 3 & Over	Tuesday 22/06/2021 04:30 pm - 05:30 pm	Cancel
Two Childcare Session 2 & Under	Tuesday 22/06/2021 04:30 pm - 05:30 pm	Cancel

When members are bumped into the childcare session, they will receive a SMS notifying them they are now booked into the session and for which child.

“Great news! Billy is now booked into Childcare at 4:30pm on 22/6/21.”

Buy Childcare Online – MyBookings

1. In MyBookings, members can select the option to Buy Childcare.
2. From here it will display all the packs of childcare available for their club and the price.

3. Choose the pack they would like to purchase and a pop up window will come up for them to choose how many packs of that product and for which child.

purchasing for each child. *

Note you can buy sessions for one child only or multiple.

Number of sessions for Five

Please Select

Please Select

1

2

3

4

Number of sessions for Three

Please Select

4. Once they have selected the packs, they will be added to their cart and they can proceed to checkout.

Buy Childcare

Please fill out the form below to purchase add-ons for your account.

Childcare 10 Sessions	Childcare 5 Sessions
\$50.00 one off fee	\$25.00 one off fee
<ul style="list-style-type: none">• Best value• Free fruit provided	<ul style="list-style-type: none">• Better value• Free fruit provided
Select	Select

Childcare Single Session

\$5.00
one off fee

Item added to Cart

- Friendly carers
- Free fruit provided

Remove from Cart

Edit pack quantity

Continue to checkout

5. At the checkout members will be able to review all of their purchases and choose their preferred payment method. They will have the option to either enter card details and pay today OR use the option to add the payment onto their next direct debit.

PLEASE NOTE: The option to add the payment onto the next direct debit will only be a visible option for members that have a valid payment agreement in their Exerp profile.




Checkout

Please review your basket, payment summary and enter credit card details.

Shopping Cart

ITEMS

QUANTITY

Childcare Single Session for One	<input type="text" value="1"/> ▼	
Childcare Single Session for Three	<input type="text" value="1"/> ▼	
Childcare Single Session for Two	<input type="text" value="1"/> ▼	

Personal details

Tahlia Childcare
203 Craigieburn Road
VIC
3064
+61 4 4886 9183
tahlia@childcare.com

Payment Summary

Childcare Single Session for One	\$5.00
Childcare Single Session for Three	\$5.00
Childcare Single Session for Two	\$5.00
GST	\$1.50
Total	\$15.00

Payment Option *

☒ Add to my Direct Debit

☐ Use new Credit Card

Payment will be made at time of your next direct debit automatically.

☐ I agree to the [website terms and conditions](#)

SUBMIT