



User Manual v 1.0



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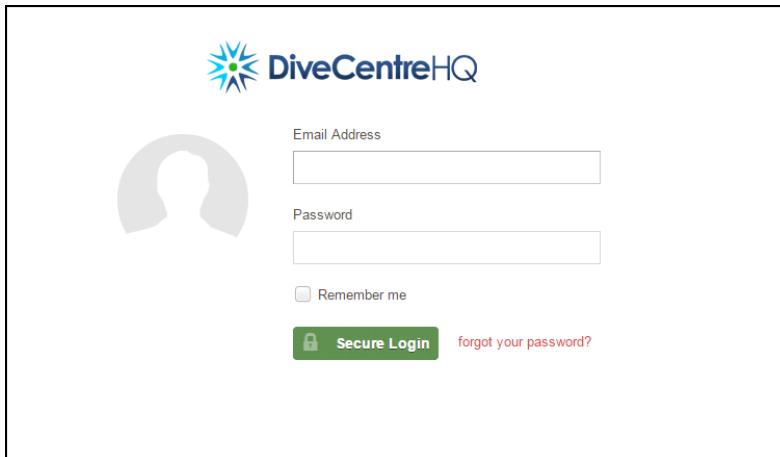
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## Logging In

The user should login into DiveCenter HQ to use the features available in the application.

### To login

1. Enter the URL (<https://app.divecentrehq.com>) in the address bar of the browser. The following page is displayed.



The screenshot shows the DiveCentreHQ login page. It features a logo at the top left, followed by a large placeholder icon of a person's head and shoulders. Below the icon are two input fields: 'Email Address' and 'Password'. Underneath these fields is a 'Remember me' checkbox. At the bottom are two buttons: a green 'Secure Login' button with a lock icon and a smaller red link 'forgot your password?'. The background is white with a light gray footer area.

2. Enter the registered email address of the user in the **Email Address** field.
3. Enter the authentication password in the **Password** field.
4. Click **Secure Login** to login to the application. On successfully logging in, the Dashboard is displayed.

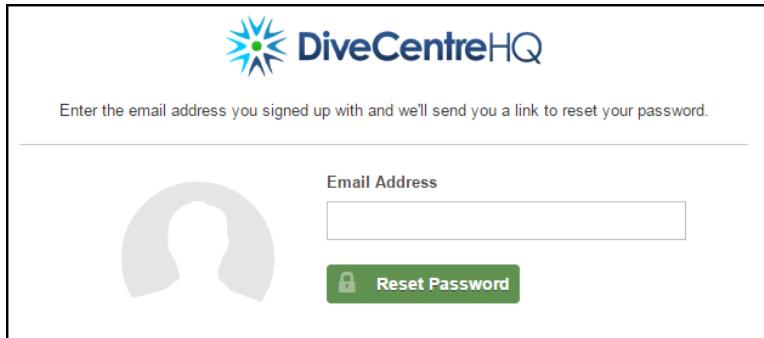
**Note:** If you want the computer to remember your credentials, select the Remember me checkbox.

## Recovering the Password

The password recovery option enables you to recover the password if you do not remember it.

### To recover the password

1. Click the **forgot your password?** link in the Login page. The following page is displayed.

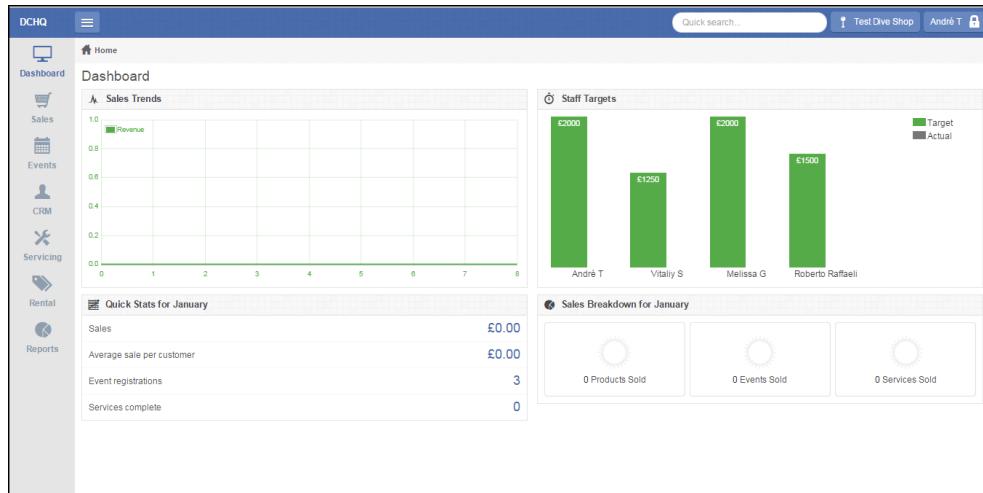


The screenshot shows the 'Forgot Password' page. It has a logo at the top left and a large placeholder icon of a person's head and shoulders. A message in the center says 'Enter the email address you signed up with and we'll send you a link to reset your password.' Below this is an 'Email Address' input field and a green 'Reset Password' button with a lock icon. The background is white with a light gray footer area.

2. Enter the registered email address in the **Email Address** field.
  3. Click **Reset Password**. This sends a link to the email address to reset the password.
-

## Dashboard

Dashboard is a pictorial representation of the custom reports, which gives a real-time snapshot of the key metrics. It provides information about the sales trends, targets, quick stats and breakdown of sales.



## Sales

### Point of Sale

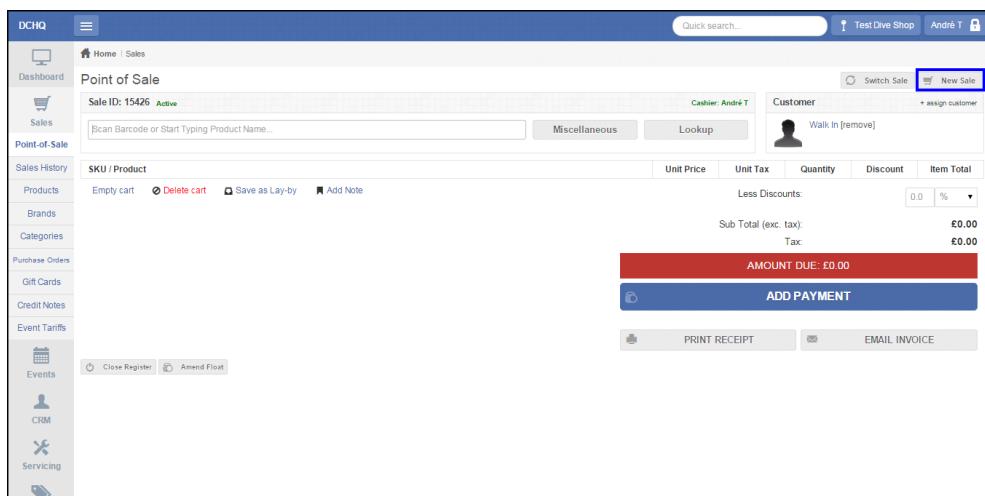
The point of sale enables the staff members to record the transactions and create invoices.

#### Creating a New Sale

The New Sale option enables you to create invoices for a new sale.

#### To create a new sale

1. Go to **Sales > Point of Sale**.
2. Click **New Sale**. The following page is displayed.



3. Scan the barcode of the product or enter the name of the product. When the product name is entered, all the products are displayed as shown.



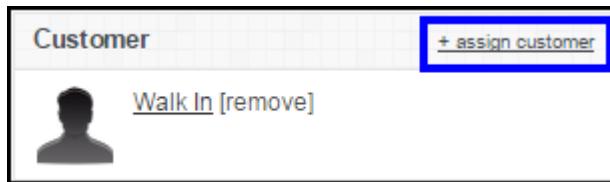
4. If you want to add a miscellaneous product, click [Miscellaneous](#). If you want to find a specific product, click [Lookup](#).
5. Once the required product is selected, the selected product is displayed in the **SKU / Product** section.



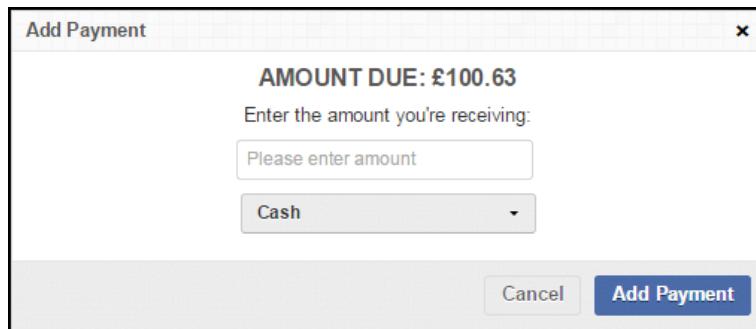
You can also perform the following functions by clicking the appropriate links in the SKU / Product section:

- **Empty Cart** – Clears all the products from the SKU / Product section.
- **Delete Cart** – Cancels the sale.
- **Save as Lay-by** – Saves the selected products.
- **Add Note** – Enables you to add additional notes for the selected products.

6. By default, the customer is assigned as **Walk In** in the Customer section. To assign an existing customer, click **Assign Customer** link.

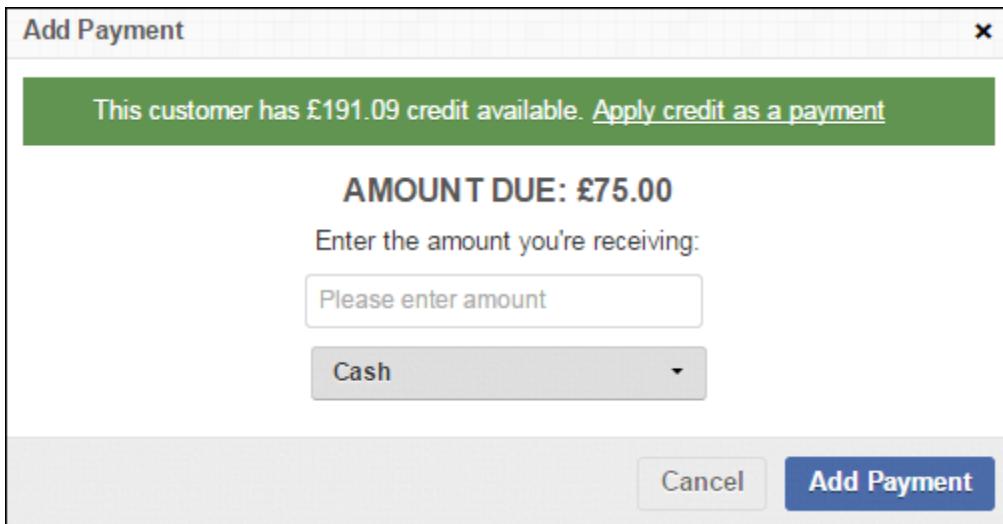


7. Select the product quantity from the Quantity dropdown list.
8. Enter the discount if any in the field corresponding to the **Discount** column. Discounts can be based on one of the following:
  - % - This provides percentage based discounts for the products purchased.
  - £ - This provides a fixed amount as discount irrespective of the value of the purchased product.
9. Click **Add Payment**.
  - If the customer has no credit note, the following popup window is displayed.

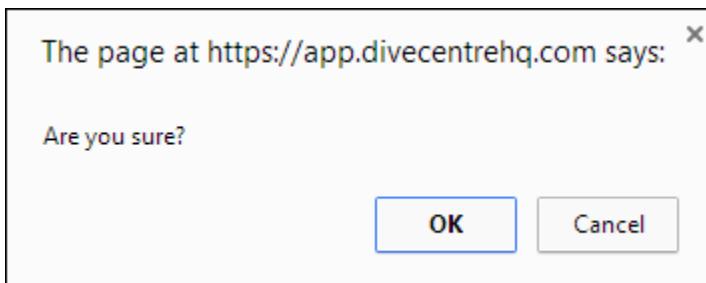


- Enter the amount received in the **Amount** field.
- Select the method of payment from the dropdown list. The following are the modes of payment:
  - i. Cash
  - ii. Visa
  - iii. PayPal
  - iv. Credit Card
  - v. Gift Card
  - vi. Epay

- If the customer has a credit note, the following popup window is displayed.

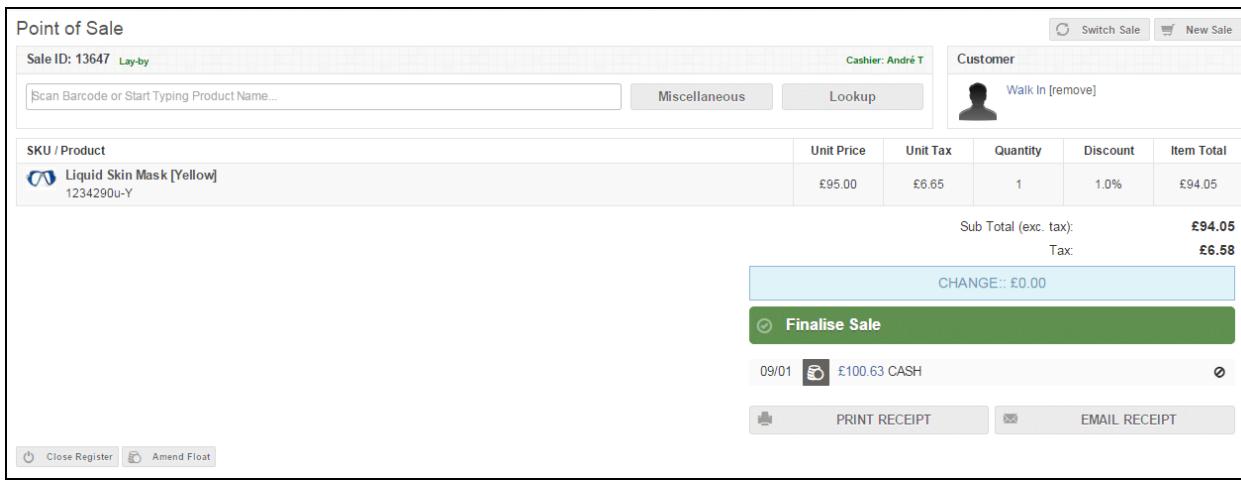


- Click **Apply credit as a payment**. The following popup window is displayed.



- Click **OK**.

## 10. Click **Add Payment**. The following window is displayed.



SKU / Product	Unit Price	Unit Tax	Quantity	Discount	Item Total
Liquid Skin Mask [Yellow] 1234290u-Y	£95.00	£6.65	1	1.0%	£94.05

Sub Total (exc. tax): **£94.05**  
Tax: **£6.58**

CHANGE: £0.00

Finalise Sale

09/01 £100.63 CASH

PRINT RECEIPT EMAIL RECEIPT

Close Register Amend Float

11. Click **Finalise Sale**. The following receipt is generated.

Sales Receipt: Complete

#13647 / 03 Nov, 2014 05:03pm



**Walk In [customer]**  
Tel: 000-000-0000  
Email: walkin@divencentrehq.com

**Test Dive Shop [merchant]**  
19c Trolley Sq Wilmington Delaware 19805  
Tel: 0123456789  
Email: info@oceanshq.com

Thank you for your order. If you have any questions about your order please contact us at info@oceanshq.com or call us on 0123456789.

SKU / Product	Unit Price	Unit Tax	Quantity	Discount	Item Total
Liquid Skin Mask [Yellow] 1234290u-Y	£95.00	£8.65	1	1.0%	£94.05
		Less Discounts:	£0.95		
		Sub Total (exc. tax):	£94.05		
		Tax:	£6.58		
NET DUE: £100.63					
LESS TOTAL PAYMENT: £100.63					
09/01 £100.63 CASH					
CHANGE: £0.00					

**PRINT RECEIPT** **EMAIL RECEIPT**

### Adding Miscellaneous Product

1. Click **Miscellaneous** button. The following popup window is displayed.

**Add Miscellaneous Product**

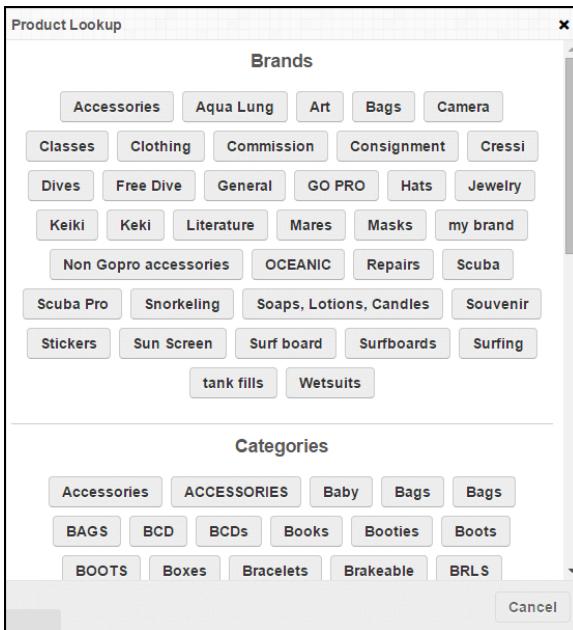
Product Price	Tax Rate
£ <input type="text"/>	9.2
Category	
Masks	
Description	

**Cancel** **Add Miscellaneous Product**

- Enter the price of the product in the **Product Price** field.
- Select the tax for the product from the **Tax Rate** dropdown list.
- Select the category of the product from the **Category dropdown** list.
- Enter the description of the product in the **Description** field.
- Click **Add Miscellaneous Product**. This adds the miscellaneous product to the SKU / Product section.

### Product Lookup

- Click **Product Lookup** button. The following popup window is displayed.

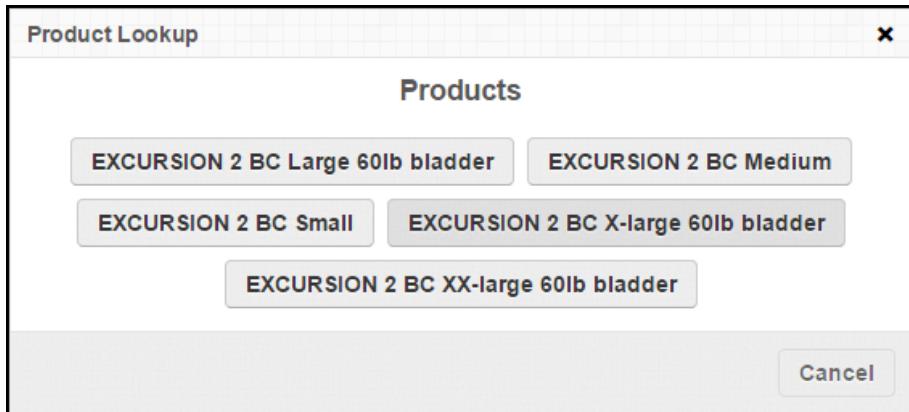


#### Categories

Accessories, ACCESSORIES, Baby, Bags, BAGS, BCD, BCDs, Books, Booties, Boots, BOOTS, Boxes, Bracelets, Brakeable, BRLS

[Cancel](#)

2. Select the required brand/category. The following popup window is displayed.



[Cancel](#)

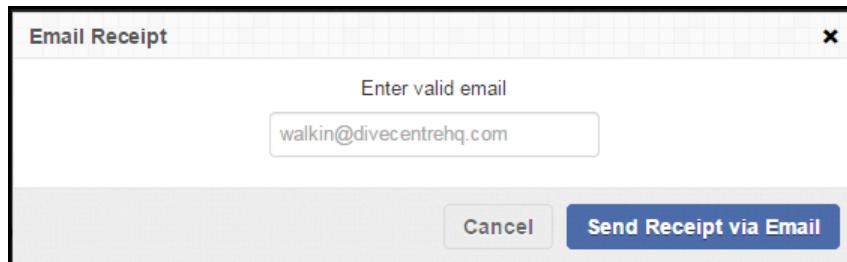
3. Click toe select the required product.
4. This adds the product to the **SKU / Product** section.

#### Printing the Receipt

1. To print the receipt, click **Print Receipt**.

#### Emailing the Receipt

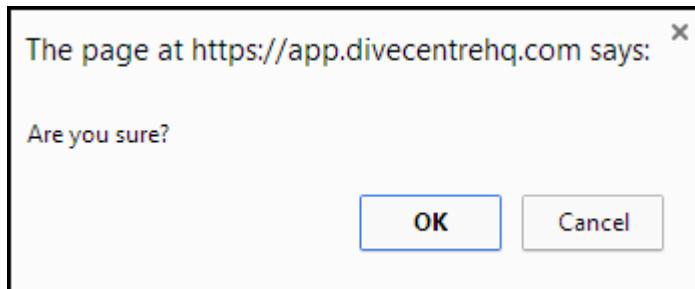
1. To email the receipt, click **Email Receipt**. The following popup window is displayed.



2. Enter the email address in the **Email** field.
3. Click **Send Receipt via Email**.

#### Emptying the Cart

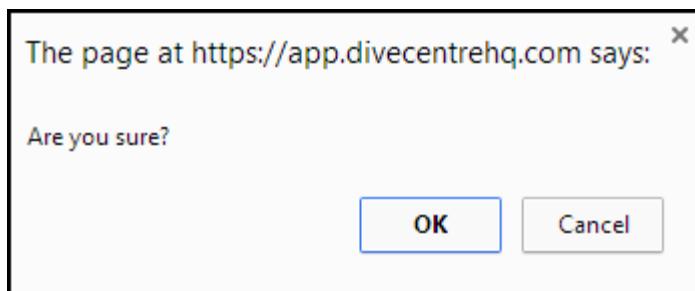
1. Click **Empty Cart** link. The following popup is displayed.



2. Click **OK** to clear the selected products from the SKU / Product section for this sale.

#### Deleting the Cart

1. Click **Delete Cart** link. The following popup is displayed.



2. Click **Ok** to delete the sale.

#### Saving as Lay-by

1. Click **Save as Lay-by** link to save the sale as draft.

#### Adding Note

1. Click **Add Note**. The following popup is displayed.

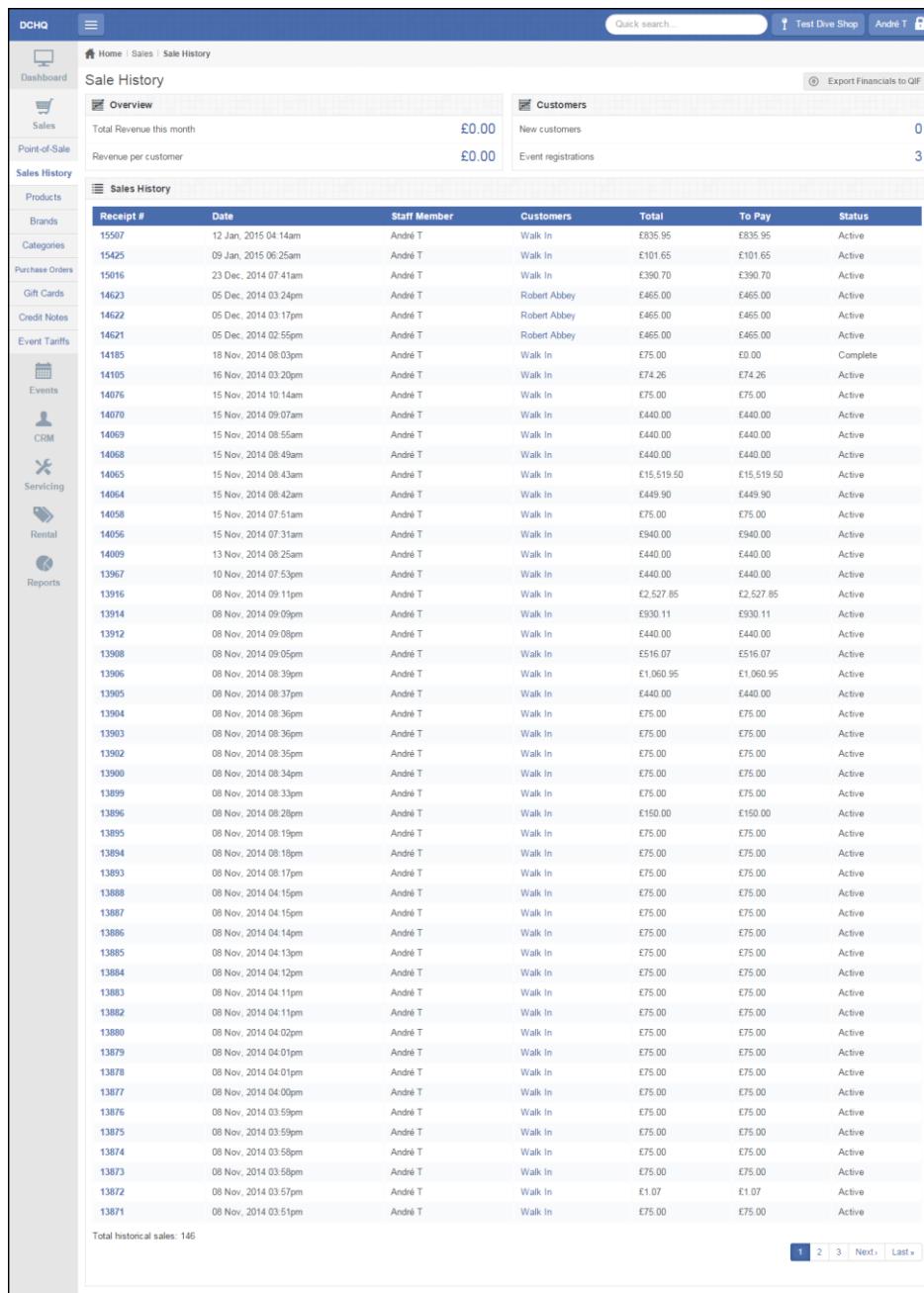


2. Enter the details in the description field and click **Add Note**.

## Sale History

The sales history section provides a summary of the sales revenue information. It also provides information about the total revenue for the month and revenue per customer as well as the number of new customers and even registrations.

1. Go to **Sales > Sales History**. The following page is displayed.



The screenshot shows the DiveCentreHQ Sales History page. The left sidebar contains navigation links for Dashboard, Sales, Point-of-Sale, Sales History, Products, Categories, Purchase Orders, Gift Cards, Credit Notes, Event Tariffs, Events, CRM, Servicing, Rental, and Reports. The main content area has tabs for Overview and Sales History. The Overview section displays Total Revenue this month (£0.00) and Revenue per customer (£0.00). The Sales History section lists 146 sales entries, each with a Receipt #, Date, Staff Member (André T), Customers (Walk In), Total, To Pay, and Status (Active). A summary at the bottom states 'Total historical sales: 146'.

2. You can click on the receipt no. link in the **Receipt #** column to view the details of the sales.
3. To view the details of the customer, click the walk in / name of the customer link from the **Customers** column.

## Refunding Items

This process enables you to refund the items that are purchased.

1. Go to **Sales > Sales History**.
2. Click the **Receipt #** link of the product to be refunded. The following page is displayed.

Sales Receipt: Complete

#13243 / 16 Oct, 2014 04:17pm



Print Receipt | Email Receipt

**Test McTester [customer]**

Tel: -  
Email: andy+testmctester@oceanshq.com

**Test Dive Shop [merchant]**

19c Trolley Sq Wilmington Delaware 19805  
Tel: 0123456789  
Email: info@oceanshq.com

Thank you for your order. If you have any questions about your order please contact us at info@oceanshq.com or call us on 0123456789.

SKU / Product	Unit Price	Unit Tax	Quantity	Discount	Item Total
test (Test McTester)	£100.00	£10.00	1	-	£100.00
Dragon BCD [XS] MAR-DRG-BCD-XS	£400.00	£40.00	1	20.0%	£320.00

Less Discounts: £80.00  
Sub Total (exc. tax): £420.00  
Tax: £42.00

NET DUE: £462.00  
LESS TOTAL PAYMENT: £500.00

31/10  £500.00 CASH

CHANGE: £38.00

 PRINT RECEIPT |  EMAIL RECEIPT

3. Select the checkboxes corresponding to the products to be refunded from the SKU / Product section.

SKU / Product

 test (Test McTester)	<input checked="" type="checkbox"/> Refund Items <input type="button" value="1"/>
 Dragon BCD [XS] MAR-DRG-BCD-XS	<input type="checkbox"/> Refund Items <input type="button" value="1"/>

4. Select the number of items from the dropdown list. The following page is displayed.

SKU / Product

	Unit Price	Unit Tax	Quantity	Discount	Item Total
test (Test McTester)	£100.00	£10.00	1	-	£100.00
Dragon BCD [XS] MAR-DRG-BCD-XS	£400.00	£40.00	1	20.0%	£320.00

Less Discounts: £80.00  
Sub Total (exc. tax): £420.00  
Tax: £42.00

NET DUE: £462.00  
LESS TOTAL PAYMENT: £500.00

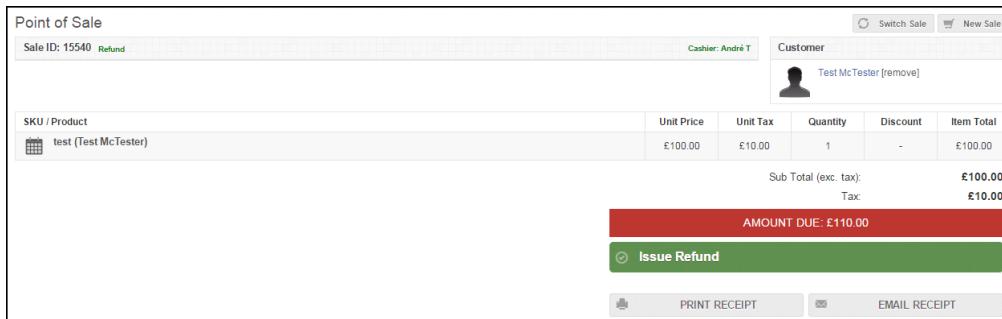
31/10  £500.00 CASH

CHANGE: £38.00

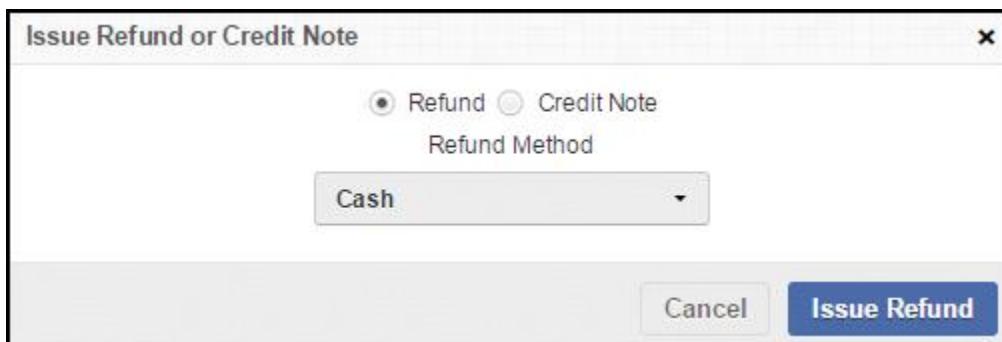
**PROCESS REFUNDS**

 PRINT RECEIPT |  EMAIL RECEIPT

5. Click **Process Refund**. The following page is displayed.

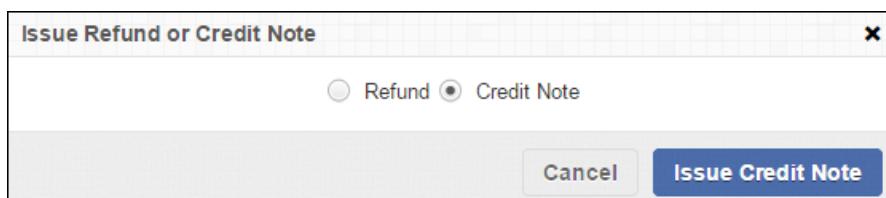


6. Click **Issue Refund**. The following popup window is displayed.



7. Select the required option.

- Refund
  - Select the refund method from the dropdown list.
  - Click **Issue Refund**.
- Credit Note
  - The following window is displayed.



- Click **Issue Credit Note**.

#### [Exporting Financials to QIF Format](#)

- Go to **Sales > Sales History**.
- Click **Export Financials to QIF**. The following popup window is displayed.

**Export Financial Data**

Select the date range you wish to export to QIF format.

Date from	Date to
<input type="text" value="01-01-2015"/> 	<input type="text" value="10-01-2015"/> 

**Cancel** **Export Financial Data**

3. Click the **Date from** field to select the from date from the popup calendar.

**Export Financial Data**

Select the date range you wish to export to QIF format.

Date from	Date to
<input type="text" value="01-01-2015"/> 	<input type="text" value="10-01-2015"/> 

<b>«</b>	January 2015	<b>»</b>				
Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	<b>1</b>	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

**Cancel** **Export Financial Data**

		Customers	Total
		Walk In	£835.9
		Walk In	£101.6
		Walk In	£390.7
		Roker Abbey	£465.0

4. Click the **Date to** field to select the to date from the popup calendar.

**Export Financial Data**

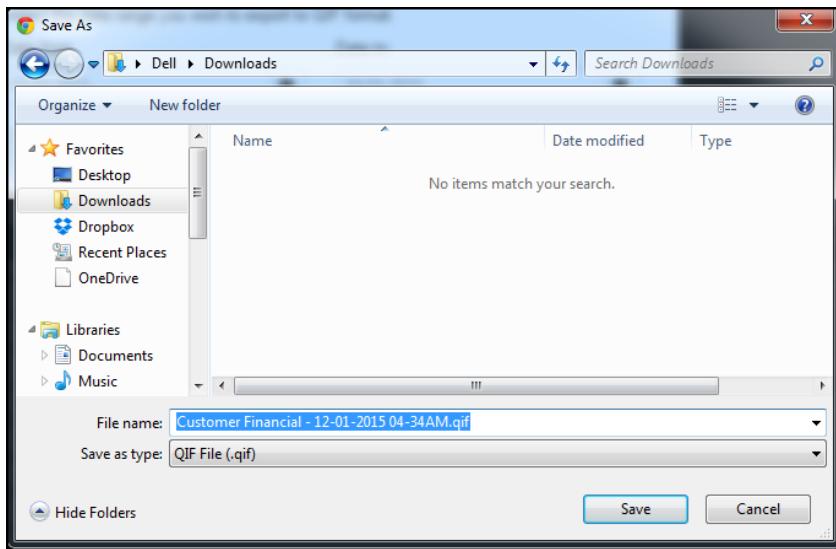
Select the date range you wish to export to QIF format.

Date from	Date to
<input type="text" value="01-01-2015"/> 	<input type="text" value="10-01-2015"/> 

<b>«</b>	January 2015	<b>»</b>					
Su	Mo	Tu	We	Th	Fr	Sa	<b>Data</b>
28	29	30	31	1	2	3	
4	5	6	7	8	9	10	
11	12	13	14	15	16	17	
18	19	20	21	22	23	24	
25	26	27	28	29	30	31	
1	2	3	4	5	6	7	

		Staff Member	Total
4am	André T	£835.9	
5am	André T	£101.6	
41am	André T	£390.7	
24pm	André T	£465.0	

5. Click **Export Financial Data**. The following window is displayed.



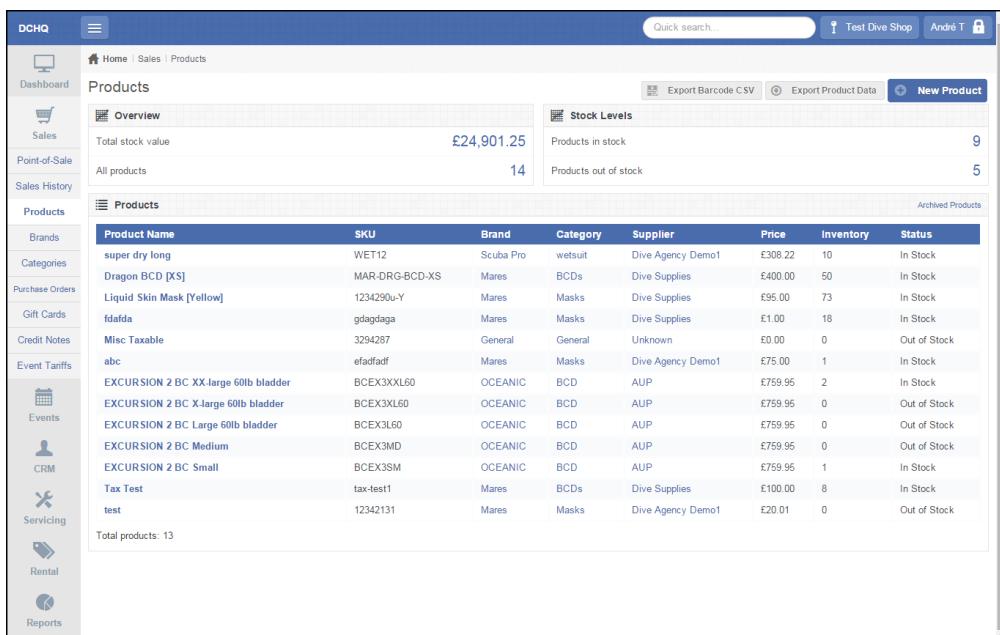
6. Select the required location to save the QIF file and click **Save**.

## Products

The Products section displays the list of available products as well as archived products. It also provides information about total stock value, number of products, products in stock and products out of stock. You can also click the product name link, category link, brand link and supplier link to view the corresponding details. You can also add new products as well as modify the product details.

### Adding New Product

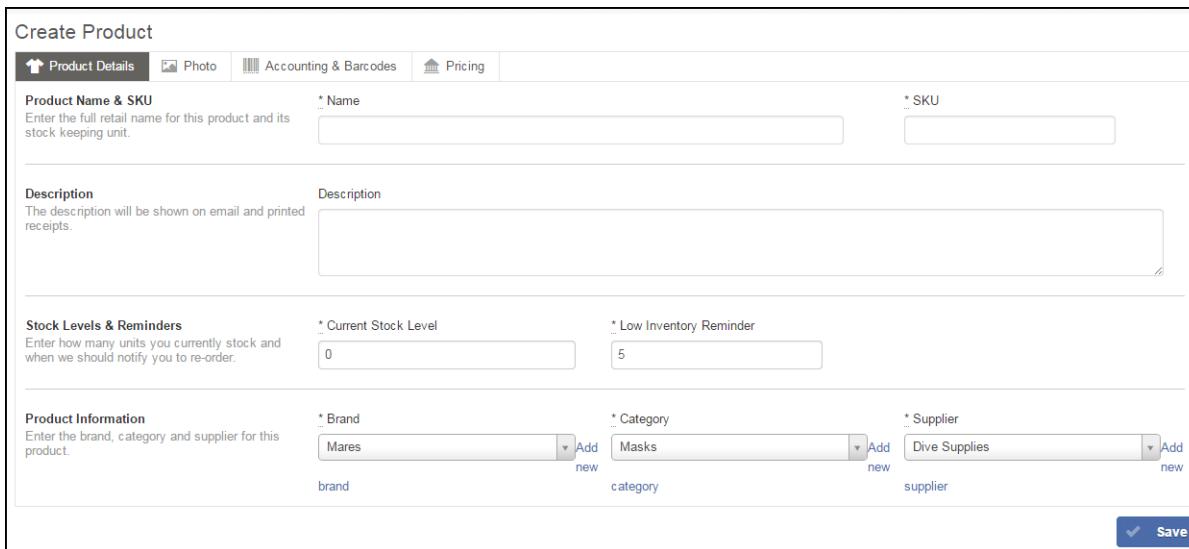
1. Go to **Sales > Products**. The following page is displayed.



Product Name	SKU	Brand	Category	Supplier	Price	Inventory	Status
super dry long	WET12	Scuba Pro	wetsuit	Dive Agency Demo1	£308.22	10	In Stock
Dragon BCD [XS]	MAR-DRG-BCD-XS	Mares	BCDs	Dive Supplies	£400.00	50	In Stock
Liquid Skin Mask [Yellow]	1234290u-Y	Mares	Masks	Dive Supplies	£95.00	73	In Stock
fdafda	gdgadaga	Mares	Masks	Dive Supplies	£1.00	18	In Stock
Misc Taxable	3294287	General	General	Unknown	£0.00	0	Out of Stock
abc	efadfafdf	Mares	Masks	Dive Agency Demo1	£75.00	1	In Stock
EXCURSION 2 BC XX-large 60lb bladder	BCEX3XXL60	OCEANIC	BCD	AUP	£759.95	2	In Stock
EXCURSION 2 BC X-large 60lb bladder	BCEX3XL60	OCEANIC	BCD	AUP	£759.95	0	Out of Stock
EXCURSION 2 BC Large 60lb bladder	BCEX3L60	OCEANIC	BCD	AUP	£759.95	0	Out of Stock
EXCURSION 2 BC Medium	BCEX3MD	OCEANIC	BCD	AUP	£759.95	0	Out of Stock
EXCURSION 2 BC Small	BCEX3SM	OCEANIC	BCD	AUP	£759.95	1	In Stock
Tax Test	tax-test1	Mares	BCDs	Dive Supplies	£100.00	8	In Stock
test	12342131	Mares	Masks	Dive Agency Demo1	£20.01	0	Out of Stock

Total products: 13

2. Click **New Product**. The following page is displayed.



**Create Product**

**Product Details** (Active Tab)

**Product Name & SKU**  
Enter the full retail name for this product and its stock keeping unit.

\* Name: [Text Input Field]  
\* SKU: [Text Input Field]

**Description**  
The description will be shown on email and printed receipts.

Description: [Text Area]

**Stock Levels & Reminders**  
Enter how many units you currently stock and when we should notify you to re-order.

\* Current Stock Level: [Text Input Field] 0  
\* Low Inventory Reminder: [Text Input Field] 5

**Product Information**  
Enter the brand, category and supplier for this product.

* Brand: Mares	Add new	* Category: Masks	Add new	* Supplier: Dive Supplies	Add new
brand		category		supplier	

**Save**

3. Product Details

- Product Name & SKU
  - i. Enter the name of the product in the **Name** field.
  - ii. Enter the stock keeping unit in the **SKU** field.
- Description
  - i. Enter the product description in the **Description** field.
- Stock Levels & Reminders
  - i. Enter the current stock level in the Current Stock Level field.
  - ii. Enter the value for the low inventory reminder in the Low Inventory Reminder field.
- Product Information
  - i. Select the product brand from the **Brand** dropdown list. To add a new brand, click [Add New Brand](#) link.
  - ii. Select the product category from the **Category** dropdown list. To add a new category, click [Add New Category](#) link.
  - iii. Select the product supplier from the **Supplier** dropdown list. To add a new supplier, click [Add New Supplier](#) link.

4. Photo

- Product Image
  - i. Click **Select file** in the **Upload File** field to upload an image to the product.

5. Accounting & Barcodes

- Accounting Codes
  - i. Enter the accounting code of the product in the **Accounting Code** field.
  - ii. Enter the supplier code of the product in the **Supplier code** field.
- Barcode
  - i. Enter the barcode of the product in the **Barcode** field.

6. Pricing

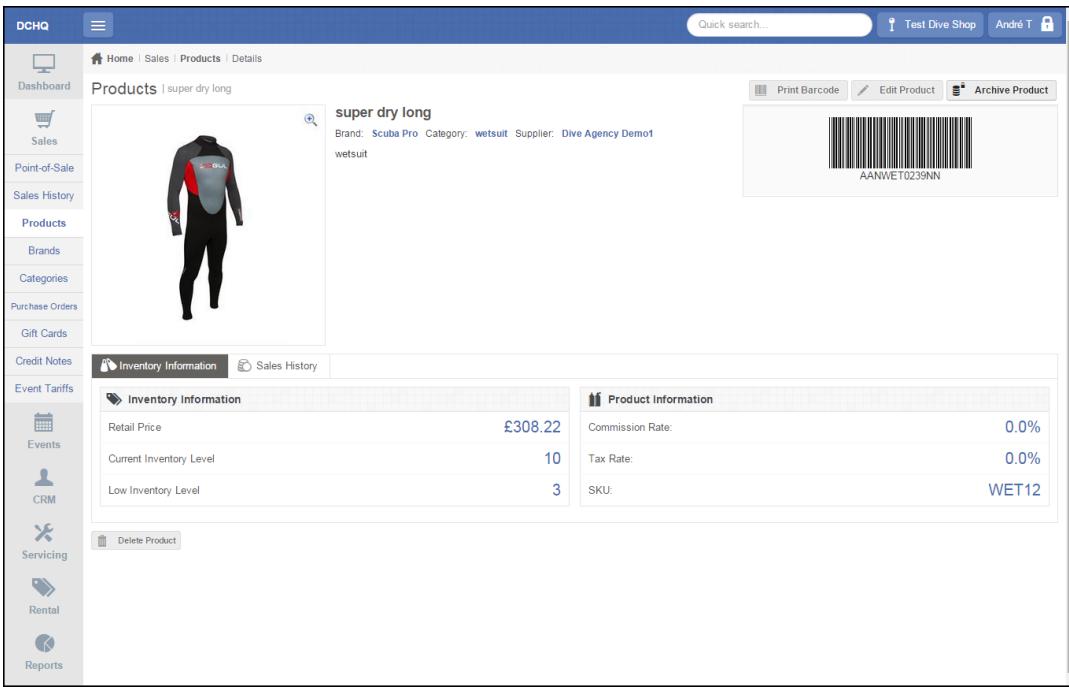
---

- Price Calculation
  - i. Enter the supply price in the **Supply Price** field.
  - ii. Enter the percentage of the markup in the **Markup** field.
  - iii. Enter the retail price of the product in the **Retail Price** field.
  - iv. Enter the offer price of the product in the **Offer Price** field.
- Tax & Commissions
  - i. Enter the tax rate from the **Tax Rate** dropdown list.
  - ii. Enter the commission rate from the **Commission Rate** dropdown list.

7. Click **Save**.

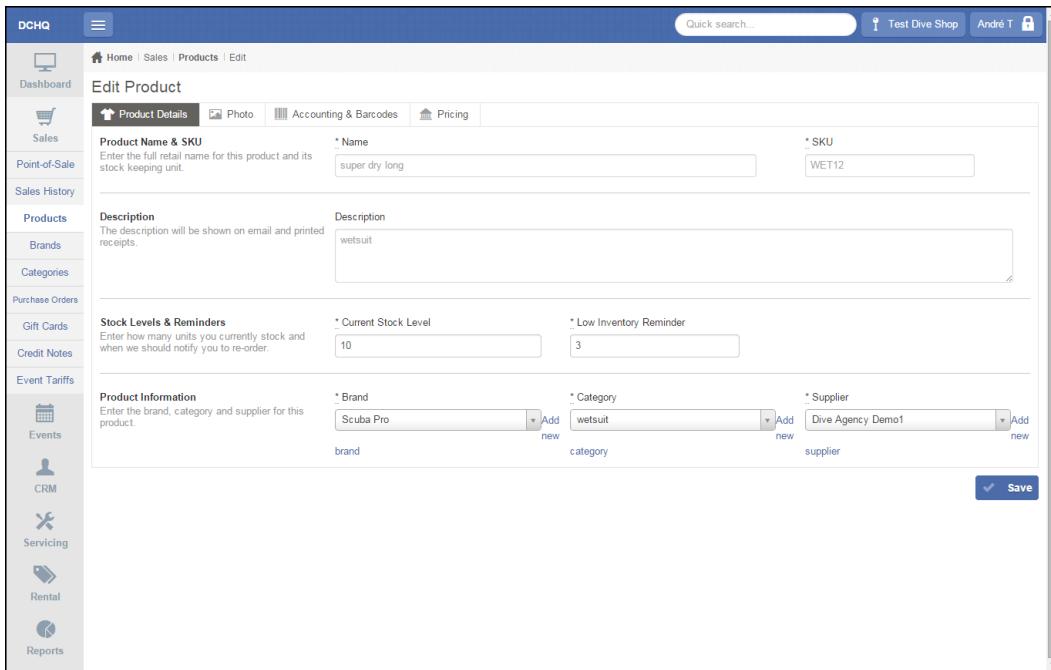
### Modifying the Product Details

1. Go to **Sales > Products**.
2. Click the product name link of the required product to be modified. The following page is displayed.



Inventory Information		Product Information	
Retail Price	£308.22	Commission Rate:	0.0%
Current Inventory Level	10	Tax Rate:	0.0%
Low Inventory Level	3	SKU:	WET12

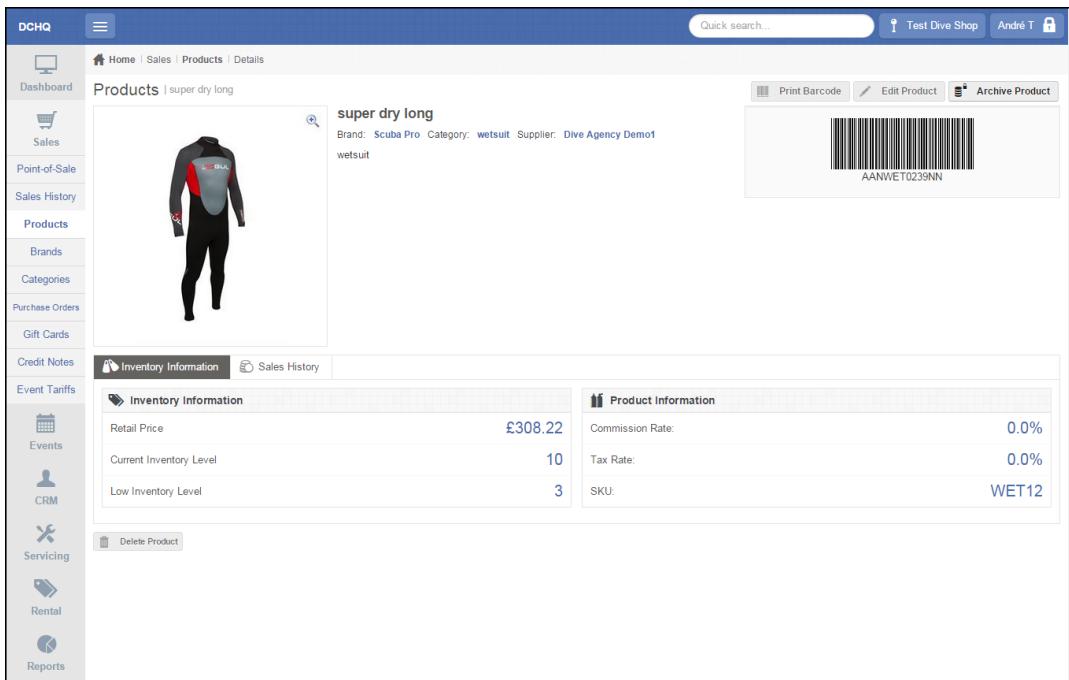
3. Click **Edit Product**. The following page is displayed.



4. Modify the required details and click **Save**.

### Printing the Barcode

1. Go to **Sales > Products**.
2. Click the product name link of the required product to be modified. The following page is displayed.



3. Click **Print Barcode**. The following page is displayed.



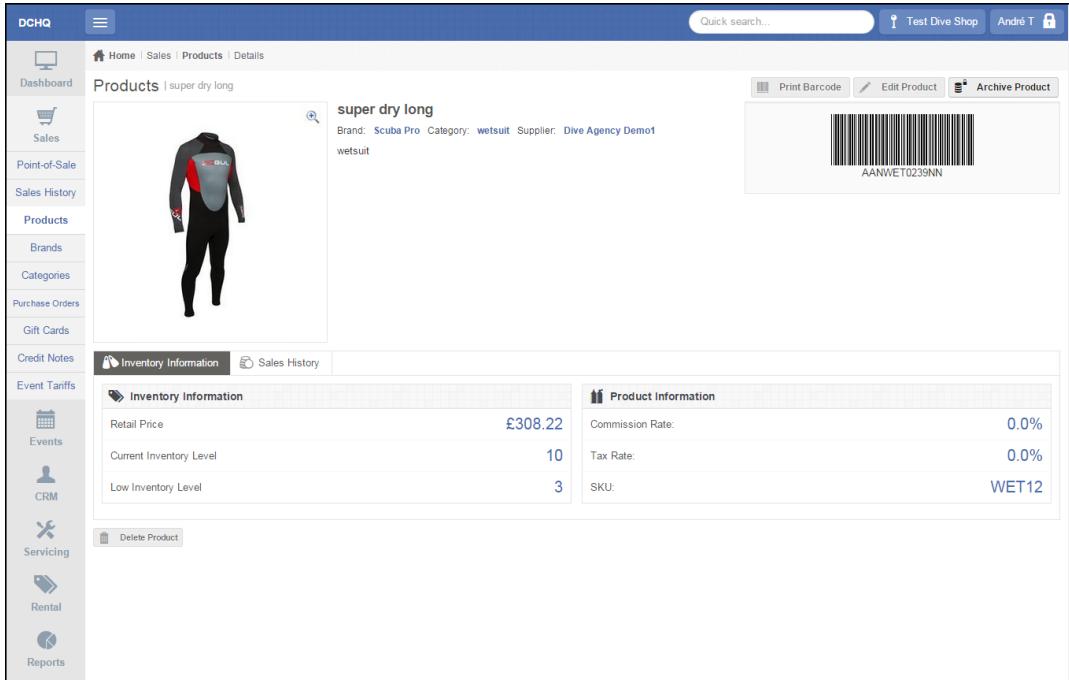
4. Enter the value in the **Enter Value** field.

5. Click **Print**.

### Archive Product

1. Go to **Sales > Products**.

2. Click the product name link of the required product to be modified. The following page is displayed.



Inventory Information		Product Information	
Retail Price	£308.22	Commission Rate:	0.0%
Current Inventory Level	10	Tax Rate:	0.0%
Low Inventory Level	3	SKU:	WET12

3. Click **Archive Product**.

### Modifying the Brand

1. Go to **Sales > Products**.

2. Click the brand name link of the required product to be modified. [Click here](#) for more information on modifying the brand details.

### Modifying the Category

1. Go to **Sales > Products**.

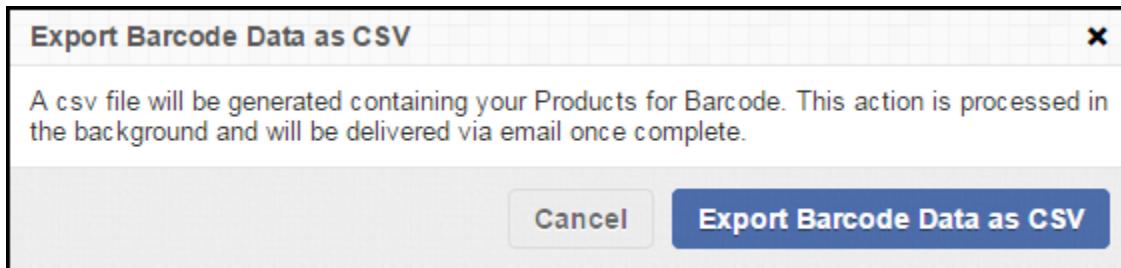
2. Click the category name link of the required product to be modified. [Click here](#) for more information on modifying the category details.

### Modifying the Supplier

1. Go to **Sales > Products**.
2. Click the supplier name link of the required product to be modified. [Click here for more information on modifying the supplier details.](#)

### Exporting Barcode CSV

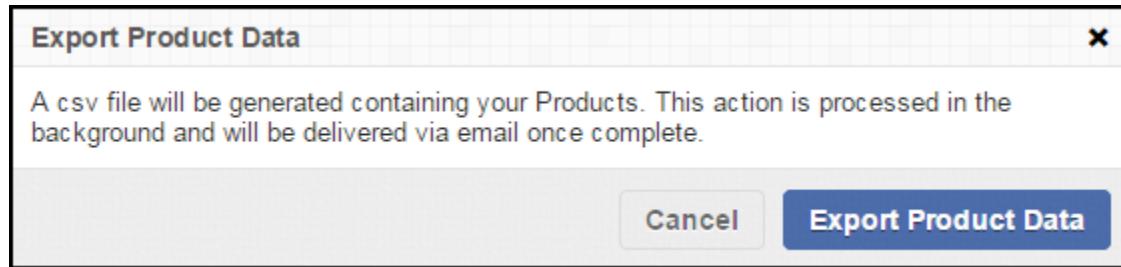
1. Go to **Sales > Products**.
2. Click **Export Barcode CSV**. The following popup window is displayed.



3. Click **Export Barcode Data as CSV**.
4. This exports the barcode and an email is received to the registered email id once export is completed.

### Export Product Data

1. Go to **Sales > Products**.
2. Click **Export Product Data**. The following popup window is displayed.



3. Click **Export Product Data**.
4. This exports the product data and an email is received to the registered email id once export is completed.

### Viewing the Archived Products

1. Go to **Sales > Products**.
2. Click **Archived Products** link. The following page is displayed.

Products		 Export Barcode CSV	 Export Product Data	 New Product			
 Overview	Total stock value	£24,901.25					
All products	14		Products in stock	9			
 Archived Products							
Product Name	SKU	Brand	Category	Supplier	Price	Inventory	Status
super dry long	WET12	Scuba Pro	wetsuit	Dive Agency Demo1	£308.22	10	In Stock
Volo Fins	VOLO-1234	Mares	Fins	Dive Supplies	£125.00	104	In Stock
Total products: 2					Products		

## Brands

This page displays the list of available brands as well as enables you to add or modify the available brands.

### Adding a Brand

1. Go to **Sales > Brands**. The following page is displayed.

Brands						 New Brand
Brand ▲	SKUs	Units in Stock	Stock Value	Average Monthly Sale	Last Sale	
Accessories	0	0	£0.00	£0.00	not available	
Aqua Lung	0	0	£0.00	£0.00	not available	
Art	0	0	£0.00	£0.00	not available	
Bags	0	0	£0.00	£0.00	not available	
Camera	0	0	£0.00	£0.00	not available	
Classes	0	0	£0.00	£0.00	not available	
Clothing	0	0	£0.00	£0.00	not available	
Commission	0	0	£0.00	£0.00	not available	
Consignment	0	0	£0.00	£0.00	not available	
Cressi	0	0	£0.00	£0.00	not available	
Dives	0	0	£0.00	£0.00	not available	
Free Dive	0	0	£0.00	£0.00	not available	
General	1	0	£0.00	£0.00	08 Nov, 2014 12:20pm	
GO PRO	0	0	£0.00	£0.00	not available	
Hats	0	0	£0.00	£0.00	not available	
Jewelry	0	0	£0.00	£0.00	not available	

2. Click **New Brand**. The following page is displayed.

Add Brand	
<input checked="" type="checkbox"/> Brand Details	
<b>Brand Name &amp; Image</b> Enter the full brand name and an associated logo.	
Brand Name The description will be shown on the brand details page. <b>Description</b> Description	<input type="text" value="Brand Name"/> <input type="file"/> <input type="button" value="Select File"/>
<input type="button" value="Save"/>	

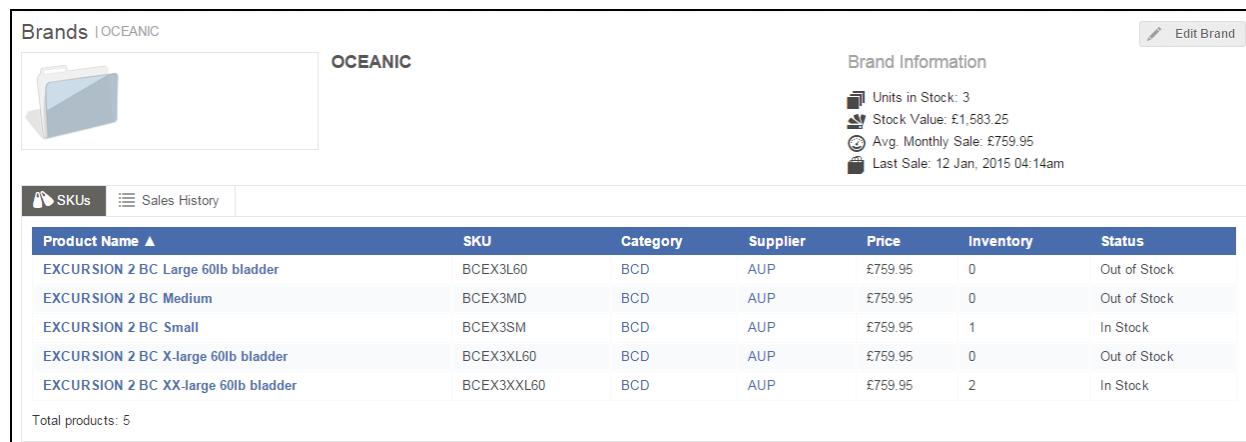
### 3. Brand Details

- Brand Name & Image
  - i. Enter the name of the brand in the **Brand Name** field.
  - ii. Click Select file in the **Upload File** field to upload an image for the brand.
- Description
  - i. Enter a brief description about the brand in the **Description** field.

### 4. Click **Save**.

## Modifying the Brand

1. Go to **Sales > Brands**.
2. Click the brand name link of the required brand to be modified. The following page is displayed.



The screenshot shows the 'Brands' section for the 'OCEANIC' brand. At the top, there's a folder icon and the brand name 'OCEANIC'. To the right, a 'Brand Information' box displays: Units in Stock: 3, Stock Value: £1,583.25, Avg. Monthly Sale: £759.95, and Last Sale: 12 Jan, 2015 04:14am. Below this are two tabs: 'SKUs' (selected) and 'Sales History'. The main table lists products under 'Product Name' (clickable links), 'SKU', 'Category', 'Supplier', 'Price', 'Inventory', and 'Status'. The products listed are: EXCURSION 2 BC Large 60lb bladder (BCEX3L60, BCD, AUP, £759.95, 0, Out of Stock); EXCURSION 2 BC Medium (BCEX3MD, BCD, AUP, £759.95, 0, Out of Stock); EXCURSION 2 BC Small (BCEX3SM, BCD, AUP, £759.95, 1, In Stock); EXCURSION 2 BC X-large 60lb bladder (BCEX3XL60, BCD, AUP, £759.95, 0, Out of Stock); and EXCURSION 2 BC XX-large 60lb bladder (BCEX3XXL60, BCD, AUP, £759.95, 2, In Stock). A note at the bottom says 'Total products: 5'.

**Note:** You can also click the product name link, category link and supplier link to view the details.

### 3. Click **Edit Brand**. The following page is displayed.



The screenshot shows the 'Edit Brand' form for the 'OCEANIC' brand. The 'Brand Details' tab is selected. It has two sections: 'Brand Name & Image' and 'Description'. In 'Brand Name & Image', there's a text input field containing 'OCEANIC' and a 'Select File' button next to an 'Upload File' input field. In 'Description', there's a text area with placeholder text: 'The description will be shown on the brand details page.' At the bottom right is a blue 'Save' button.

### 4. Modify the required details and click **Save**.

## Categories

This page displays the list of available categories as well as enables you to add or modify the categories.

## Adding a Category

1. Go to **Sales > Categories**. The following page is displayed.
-

Categories					
Category ▲	SKUs	Units in Stock	Stock Value	Average Monthly Sale	Last Sale
Accessories	0	0	£0.00	£0.00	not available
ACCESSORIES	0	0	£0.00	£0.00	not available
Baby	0	0	£0.00	£0.00	not available
Bags	0	0	£0.00	£0.00	not available
Bags	0	0	£0.00	£0.00	not available
BAGS	0	0	£0.00	£0.00	not available
BCD	5	3	£1,563.25	£769.95	12 Jan, 2015 04:14am
BCDs	2	58	£10,400.00	£0.00	05 Dec, 2014 03:24pm
Books	0	0	£0.00	£0.00	not available
Booties	0	0	£0.00	£0.00	not available
Boots	0	0	£0.00	£0.00	not available
BOOTS	0	0	£0.00	£0.00	not available
Boxes	0	0	£0.00	£0.00	not available
Bracelets	0	0	£0.00	£0.00	not available

2. Click **New Category**. The following page is displayed.

### Add Category

Category Details

<b>Category Name</b> <small>Enter the full category name.</small>	<small>* Category Name</small> <input style="width: 100%; height: 25px;" type="text"/>
<b>Description</b> <small>The description will be shown on the category details page.</small>	
<small>Description</small> <input style="width: 100%; height: 50px;" type="text"/>	
<input style="border: 1px solid #ccc; padding: 2px 10px; background-color: #f2f2f2; font-weight: bold; cursor: pointer;" type="button"/> Save	

3. Category Details.

- Category Name
  - i. Enter the name of the company in the **Company Name** field.
- Description
  - i. Enter the brief description about the category in the **Description** field.

4. Click **Save**.

### Modifying the Category

1. Go to **Sales > Categories**.
2. Click the category name link of the required category to be modified. The following page is displayed.

Categories | BCD

**BCD**

Category Information						
Units in Stock:	3					
Stock Value:	£1,583.25					
Avg. Monthly Sale:	£759.95					
Last Sale:	12 Jan, 2015 04:14am					
SKUs						
Product Name ▲	SKU	Brand	Supplier	Price	Inventory	Status
EXCURSION 2 BC Large 60lb bladder	BCEX3L60	OCEANIC	AUP	£759.95	0	Out of Stock
EXCURSION 2 BC Medium	BCEX3MD	OCEANIC	AUP	£759.95	0	Out of Stock
EXCURSION 2 BC Small	BCEX3SM	OCEANIC	AUP	£759.95	1	In Stock
EXCURSION 2 BC X-large 60lb bladder	BCEX3XL60	OCEANIC	AUP	£759.95	0	Out of Stock
EXCURSION 2 BC XX-large 60lb bladder	BCEX3XXL60	OCEANIC	AUP	£759.95	2	In Stock

Total products: 5

3. Click **Edit Category**. The following page is displayed.

Categories | BCD

**BCD**

Category Information						
Units in Stock:	3					
Stock Value:	£1,583.25					
Avg. Monthly Sale:	£759.95					
Last Sale:	12 Jan, 2015 04:14am					
SKUs						
Product Name ▲	SKU	Brand	Supplier	Price	Inventory	Status
EXCURSION 2 BC Large 60lb bladder	BCEX3L60	OCEANIC	AUP	£759.95	0	Out of Stock
EXCURSION 2 BC Medium	BCEX3MD	OCEANIC	AUP	£759.95	0	Out of Stock
EXCURSION 2 BC Small	BCEX3SM	OCEANIC	AUP	£759.95	1	In Stock
EXCURSION 2 BC X-large 60lb bladder	BCEX3XL60	OCEANIC	AUP	£759.95	0	Out of Stock
EXCURSION 2 BC XX-large 60lb bladder	BCEX3XXL60	OCEANIC	AUP	£759.95	2	In Stock

Total products: 5

**Note:** You can also click the product name link, brand link and supplier link to view the details.

4. The following page is displayed.

Edit Category

**A<sup>+</sup> Category Details**

Category Name Enter the full category name.	* Category Name <input type="text" value="BCD"/>
Description The description will be shown on the category details page.	Description <input type="text"/>
<input checked="" type="checkbox"/> Save	

5. Modify the required details and click **Save**.

## Purchase Orders

This page displays the list of purchase orders as well as enables you to add new purchase orders or modify the existing purchase orders.

### Creating a New Purchase Order

1. Go to **Sales > Purchase Orders**. The following page is displayed.

Purchase Orders							
Overview				Consignments			
Pending PO's				Expecting Delivery			
Purchase Orders Sent to Suppliers				Received			
Purchase Orders							
PO #	Supplier	Delivery Location	Value	Status	Last Updated	Expected Delivery	
496	Ahead	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	12 Jan, 2015 06:53am	-	
494	-	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	12 Jan, 2015 06:48am	-	
493	Ahead	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	12 Jan, 2015 06:19am	-	
273	AUP	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	08 Aug, 2014 05:47pm	-	
216	AUP	19c Trolley Sq Wilmington Delaware 19805	£1,583.25	Sent to supplier	07 Jul, 2014 11:35am	-	
156	Dive Agency Demo1	19c Trolley Sq Wilmington Delaware 19805	£350.00	Received in part	10 Jul, 2014 01:11pm	11 Jul, 2014	
91	AUP	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	27 Feb, 2014 11:33am	-	
67	Dive Agency Demo1	19c Trolley Sq Wilmington Delaware 19805	£1,120.00	Received in part	25 Jun, 2014 06:19am	-	
66	Dive Agency Demo1	19c Trolley Sq Wilmington Delaware 19805	£60.00	Sent to supplier	06 Feb, 2014 04:00pm	-	
14	AUP	19c Trolley Sq Wilmington Delaware 19805	£527.75	Pending	23 Jul, 2014 10:04am	-	
13	Dive Supplies	19c Trolley Sq Wilmington Delaware 19805	£450.00	Received in part	29 Nov, 2013 10:44am	03 Dec, 2013	
7	Dive Supplies	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	16 Nov, 2013 08:07am	-	

2. Click **New Purchase Order**. The following popup window is displayed.

### New Purchase Order

X

Select the supplier and location the items will be shipped to.

<b>Supplier</b>	<b>Delivery Location</b>
<b>Add a New Supplier</b>	<b>Test Dive Shop</b>
<span style="border: 1px solid #ccc; padding: 2px 10px; margin-right: 10px;">Cancel</span> <span style="background-color: #4CAF50; color: white; border: none; padding: 2px 10px; font-weight: bold;">Create Purchase Order</span>	

3. Select the supplier from the **Supplier** dropdown list.
4. Select the location of delivery from the **Delivery Location** dropdown list.
5. Click **Create Purchase Order**. The following page is displayed.

New Purchase Order

Purchase Order ID: 497 Status: Pending	Staff: André T	Supplier
Scan Barcode or Start Typing Product Name...	0	Ahead [remove]
Add Product Not In Inventory		
SKU / Product		Supply Price    Quantity    Sub-Total
Empty PO <input type="button" value="Delete PO"/> <input type="button" value="Add Note"/>		PURCHASE ORDER TOTAL: £0.00
		<input type="button" value="SEND TO SUPPLIER"/>
		<input type="button" value="PRINT PURCHASE ORDER"/>

- Scan the barcode of the product or enter the name of the product. When the product name is entered, all the products are displayed.

Purchase Order ID: 501 Status: Pending

flap
Flaps - SKU: 112345
SKU / Product
Empty PO <input type="button" value="Delete PO"/> <input type="button" value="Add Note"/>

- Enter the required quantity.
- Click **Add Product**. This adds the product to the SKU / Product section.

New Purchase Order

Purchase Order ID: 501 Status: Pending	Staff: André T	Supplier
Scan Barcode or Start Typing Product Name...	1	Ahead [remove]
Add Product Not In Inventory		
SKU / Product		Supply Price    Quantity    Sub-Total
Flaps Supplier Code:   SKU: 112345	10.00	1 £10.00

- Click **Send to Supplier**. The following popup window is displayed.

Send to Supplier

Enter the supplier's email address below to send the Purchase Order to.

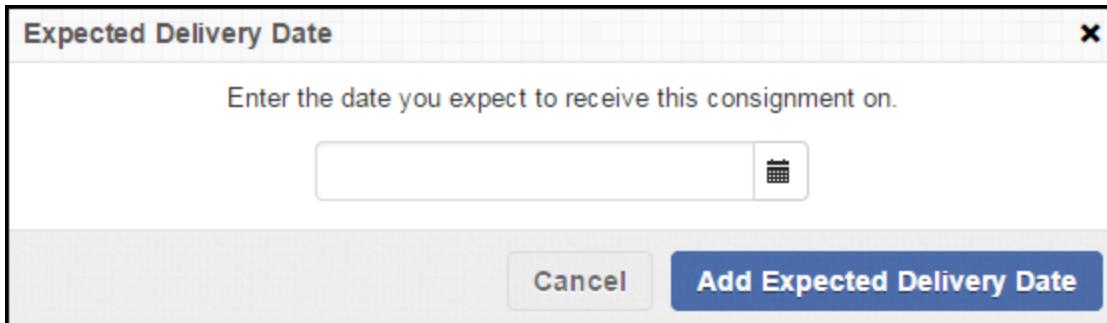
Download the Purchase Order as PDF

10. Enter the email address of the supplier in the **Email** field.
11. Click **Send Purchase Order via Email**. The following page is displayed.

**New Purchase Order**

Purchase Order ID: 501 Status: Sent to supplier		Staff: André T	Supplier
Add Expected Delivery Date		 <b>RECEIVE CONSIGNMENT</b>	
<b>SKU / Product</b>  Flaps Supplier Code:   SKU: 112345		Supply Price	Quantity
		£10.00	1
<input type="checkbox"/> Add Note		PURCHASE ORDER TOTAL: £10.00	
		 PRINT PURCHASE ORDER	

12. To add the delivery date, click **Add Expected Delivery Date** link. The following popup window is displayed.

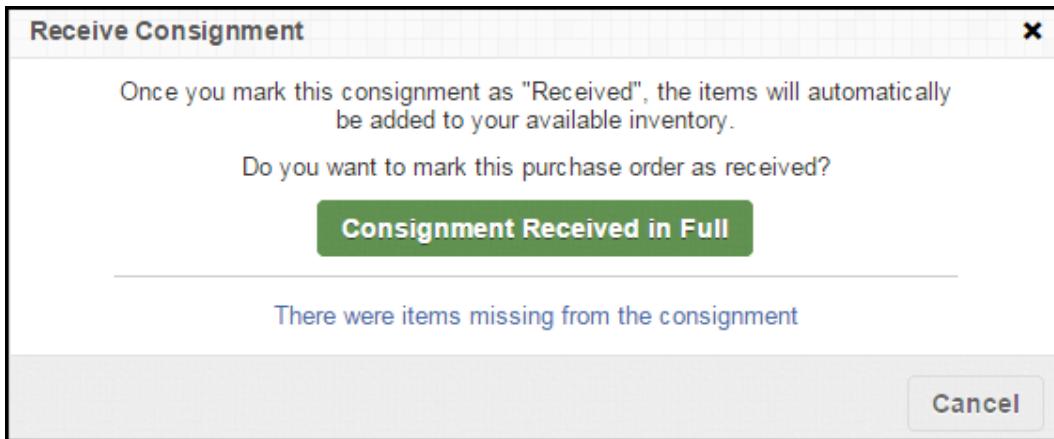


13. Click the **Date** field to select the required date.
14. Click **Add Expected Delivery Date**. This triggers an email to the supplier and the following page is displayed.

**New Purchase Order**

Purchase Order ID: 502 Status: Sent to supplier		Staff: André T	Supplier
Add Expected Delivery Date		 <b>RECEIVE CONSIGNMENT</b>	
<b>SKU / Product</b>  Flaps Supplier Code:   SKU: 112345		Supply Price	Quantity
		£10.00	1
<input type="checkbox"/> Add Note		PURCHASE ORDER TOTAL: £10.00	
		 PRINT PURCHASE ORDER	

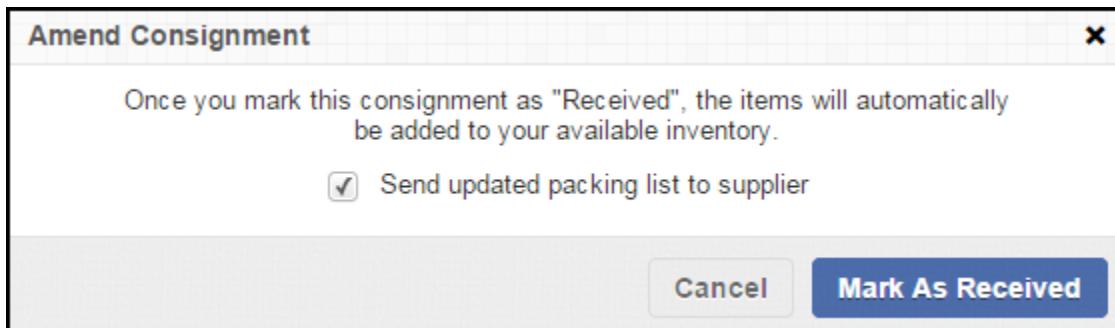
15. Once the consignment is received, click **Receive Consignment**. The following popup window is displayed.



16. If the consignment is received as ordered, click **Consignment Received in Full**.
17. If some items were missing from the consignment, click **There were items missing from the consignment** link. The following page is displayed and the status is set as **Received in Part**.

SKU / Product	Supply Price	Accepted	Rejected	Sub-Total
Flaps Supplier Code:   SKU: 112345	10.00	1	0	£10.00

18. Once all the consignment are received, click **Amend Consignment**. The following popup is displayed.



19. Click **Mark As Received** to indicate that the consignment is fully received.

#### [Adding Product Not In Inventory](#)

1. Click **Add Product Not In Inventory** link. The following popup window is displayed.

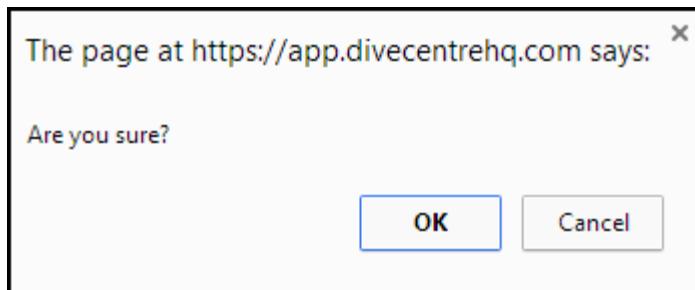
**Add New Product**

Name	SKU	
<input type="text"/>	<input type="text"/>	
Brand	Category	Supplier
Mares	Masks	Ahead
Tax Rate	Supply Price	Retail Price
9.2	\$ 0.0	\$ 0.0
<input type="button" value="Cancel"/> <input type="button" value="Add New Product"/>		

2. Enter the name of the product in the **Name** field.
3. Enter the available units in the **SKU** field.
4. Select the brand of the product from the **Brand** dropdown list.
5. Select the category of the product from the **Category** dropdown list.
6. Select the product supplier from the **Supplier** dropdown list.
7. Select rate of tax from the **Tax Rate** dropdown list.
8. Enter the supply price of the product in the **Supply Price** field.
9. Enter the retail price of the product in the **Retail Price** field.
10. Click **Add New Product**.

#### Emptying the Purchase Order

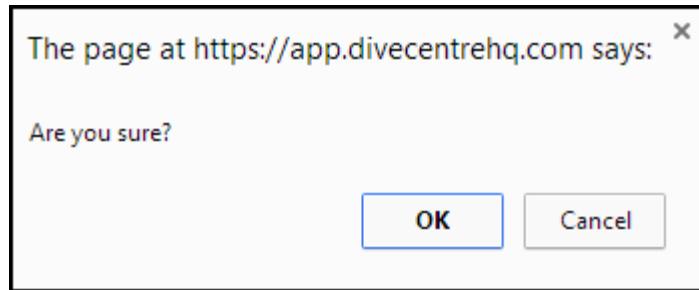
1. Click **Empty PO** link. The following popup is displayed.



2. Click **OK** to clear the selected products from the SKU / Product section.

#### Deleting the Purchase Order

1. Click **Delete PO** link. The following popup is displayed.



2. Click **OK** to delete the purchase order.

#### **Adding Note**

1. Click **Add Note**. The following popup is displayed.



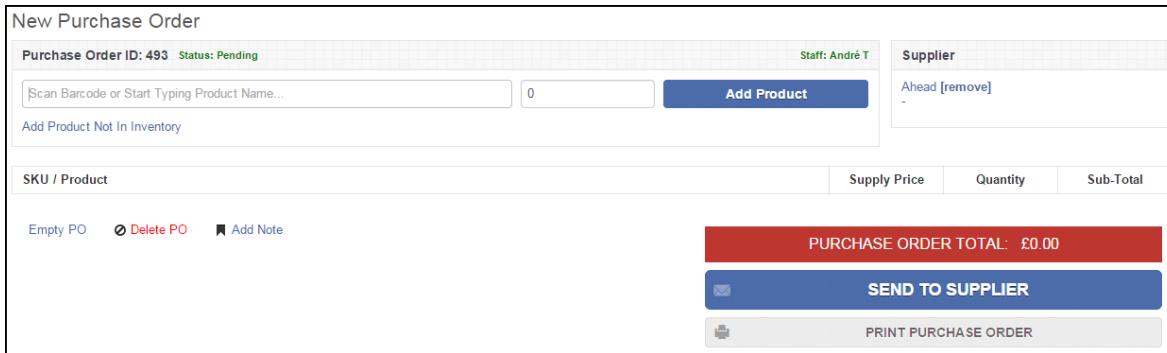
2. Enter the details in the description field and click **Add Note**.

#### **Modifying the Purchase Order**

1. Go to **Sales > Purchase Orders**. The following page is displayed.

Purchase Orders							 New Purchase Order
Overview			Consignments				
Pending PO's		8	Expecting Delivery				0
Purchase Orders Sent to Suppliers		2	Received				4
Purchase Orders							
PO #	Supplier	Delivery Location	Value	Status	Last Updated	Expected Delivery	
496	Ahead	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	12 Jan, 2015 06:53am	-	
494	-	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	12 Jan, 2015 06:48am	-	
493	Ahead	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	12 Jan, 2015 06:19am	-	
273	AUP	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	08 Aug, 2014 05:47pm	-	
216	AUP	19c Trolley Sq Wilmington Delaware 19805	£1,583.25	Sent to supplier	07 Jul, 2014 11:35am	-	
156	Dive Agency Demo1	19c Trolley Sq Wilmington Delaware 19805	£350.00	Received in part	10 Jul, 2014 01:11pm	11 Jul, 2014	
91	AUP	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	27 Feb, 2014 11:33am	-	
67	Dive Agency Demo1	19c Trolley Sq Wilmington Delaware 19805	£1,120.00	Received in part	25 Jun, 2014 06:19am	-	
66	Dive Agency Demo1	19c Trolley Sq Wilmington Delaware 19805	£60.00	Sent to supplier	06 Feb, 2014 04:00pm	-	
14	AUP	19c Trolley Sq Wilmington Delaware 19805	£527.75	Pending	23 Jul, 2014 10:04am	-	
13	Dive Supplies	19c Trolley Sq Wilmington Delaware 19805	£450.00	Received in part	29 Nov, 2013 10:44am	03 Dec, 2013	
7	Dive Supplies	19c Trolley Sq Wilmington Delaware 19805	£0.00	Pending	16 Nov, 2013 08:07am	-	

2. Click the purchase order number link from the **PO#** column. The following page is displayed.



The screenshot shows the 'New Purchase Order' interface. At the top, it displays 'Purchase Order ID: 493 Status: Pending' and 'Staff: André T'. Below this is a search bar with placeholder 'Scan Barcode or Start Typing Product Name...' and a quantity input field set to '0'. A blue 'Add Product' button is next to it. To the right, there's a 'Supplier' section with a dropdown menu showing 'Ahead [remove]' and a single item listed. Below the search bar is a link 'Add Product Not In Inventory'. The main area has a table header 'SKU / Product', 'Supply Price', 'Quantity', and 'Sub-Total'. Underneath are buttons for 'Empty PO', 'Delete PO', and 'Add Note'. On the right side, a red box shows 'PURCHASE ORDER TOTAL: £0.00'. Below that is a blue 'SEND TO SUPPLIER' button with an envelope icon. At the bottom right is a grey 'PRINT PURCHASE ORDER' button.

3. Modify the required details and click **Send to Supplier**. Refer to [creating a purchase order](#) for more information.

## **Gift Cards**

This option enables you to create gift cards which can be used to purchase the items.

### **Create Gift Cards**

1. Go to **Sales > Gift Cards**. The following page is displayed.



The screenshot shows the 'Gift Cards' page. At the top is a 'New Gift Card' button. Below is a table with columns: 'Value', 'Valid For', 'This Month's Sale', and 'Last Sale'. The data is as follows:

Value	Valid For	This Month's Sale	Last Sale
£50.00	6 months from date of issue	£0.00	
£25.00	12 months from date of issue	£0.00	
£20.00	12 months from date of issue	£0.00	

Total gift cards: 3

2. Click **New Gift Card**. The following page is displayed.



The screenshot shows the 'Add Gift Card Type' page. It has a 'Gift Card Details' tab selected. Under 'Card Value', there is a note 'Enter the value of the gift card.' and a 'Value' input field containing '0.00'. Under 'Validity', there is a note 'The validity will be linked to each gift card sold.' and a 'Valid For' dropdown menu showing '3 months'. At the bottom right is a blue 'Save' button with a checkmark icon.

3. Card Value
  - Enter the value of the card in the **Value** field.
4. Validity
  - Select the validity for the card from the **Validity For** dropdown list.
5. Click **Save**.

### **Modifying the Gift Card**

1. Go to **Sales > Gift Cards**.
2. Click the value of the gift card to be modified. The following page is displayed.

Gift Card Type | £75.00

£75.00


  
5c91024f9aef411

Edit Gift Card
Pause Gift Card

**Gift Card Information**

- Value: £75.00
- Valid For: 3 months
- Unique ID: 5c91024f9aef411

Gift Cards						
Sales	Unique ID	Available Balance	Issue Date	Expiry Date	Status	Actions

3. Click **Edit Gift Card**. The following page is displayed.

Edit Gift Card Type

**Gift Card Details**

Card Value	* Value Enter the value of the gift card.
	<input type="text" value="75.00"/>
Validity	* Valid For The validity will be linked to each gift card sold.
	<input type="text" value="3 months"/>

Save

4. Modify the required details and click **Save**.

### Disabling/Enabling Gift Cards

1. Go to **Sales > Gift Cards**.
2. Click the value of the gift card to be modified. The following page is displayed.

Gift Card Type | £75.00

£75.00


  
5c91024f9aef411

Edit Gift Card
Pause Gift Card

**Gift Card Information**

- Value: £75.00
- Valid For: 3 months
- Unique ID: 5c91024f9aef411

Gift Cards						
Sales	Unique ID	Available Balance	Issue Date	Expiry Date	Status	Actions

3. Click **Pause Gift Card** to disable the gift card. The following page is displayed.

Gift Card Type | £75.00

£75.00


  
5c91024f9aef411

Edit Gift Card
Resume Gift Card

**Gift Card Information**

- Value: £75.00
- Valid For: 3 months
- Unique ID: 5c91024f9aef411

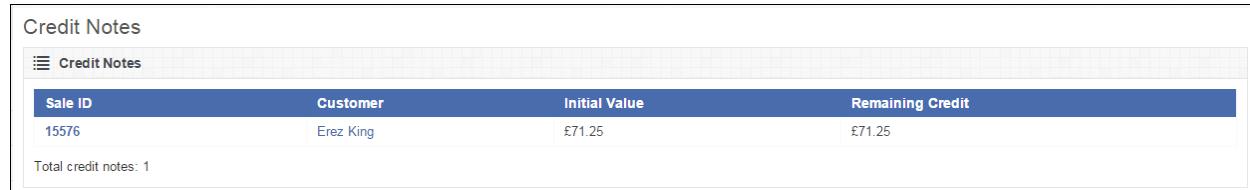
Gift Cards						
Sales	Unique ID	Available Balance	Issue Date	Expiry Date	Status	Actions

4. Click **Resume Gift Card** to enable the card.

## Credit Note

A credit note is generated when the customer refunds a product. The Credit Note section displays the list of credit notes.

1. Go to **Sales > Credit Notes**. The following page is displayed.



Credit Notes			
Credit Notes			
Sale ID	Customer	Initial Value	Remaining Credit
15576	Erez King	£71.25	£71.25
Total credit notes: 1			

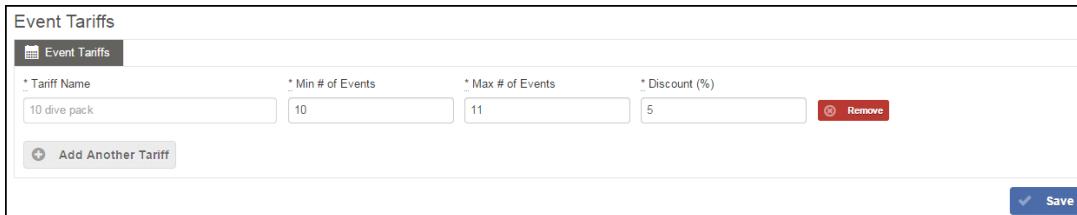
2. You can click the Sale ID link to view the sales receipt.
3. To view the customer details, click the customer name link.

## Event Tariffs

This option enables you to add new tariffs as well as modify or delete the existing tariffs.

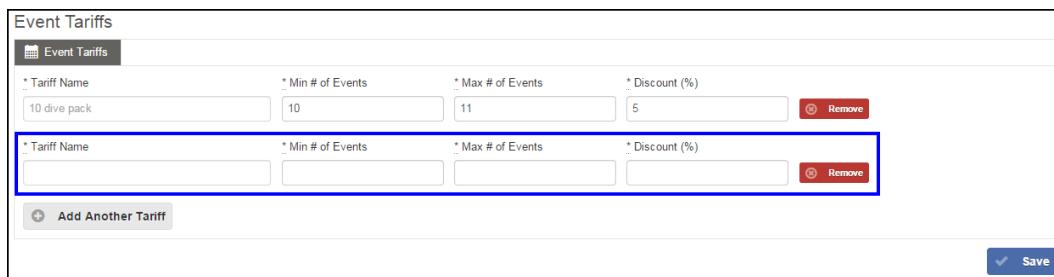
### Adding a New Tariff

1. Go to **Sales > Event Tariffs**. The following page is displayed.



Event Tariffs				
Event Tariffs				
* Tariff Name	* Min # of Events	* Max # of Events	* Discount (%)	
10 dive pack	10	11	5	

2. Click **Add Another Tariff**. The following page is displayed.



Event Tariffs				
Event Tariffs				
* Tariff Name	* Min # of Events	* Max # of Events	* Discount (%)	
10 dive pack	10	11	5	
* Tariff Name	* Min # of Events	* Max # of Events	* Discount (%)	

3. Enter the name of the tariff in the **Tariff Name** field.
4. Enter the minimum number of events in the **Min # of Events** field.
5. Enter the maximum number of events in the **Max # of Events** field.
6. Enter the discount percentage in the **Discount (%)** field.
7. Click **Save**.
8. To modify the value, update the required values and click **Save**.

### Deleting the Tariff

1. Go to **Sales > Event Tariffs**. The following page is displayed.

2. Click **Remove** corresponding to the tariff to be deleted.

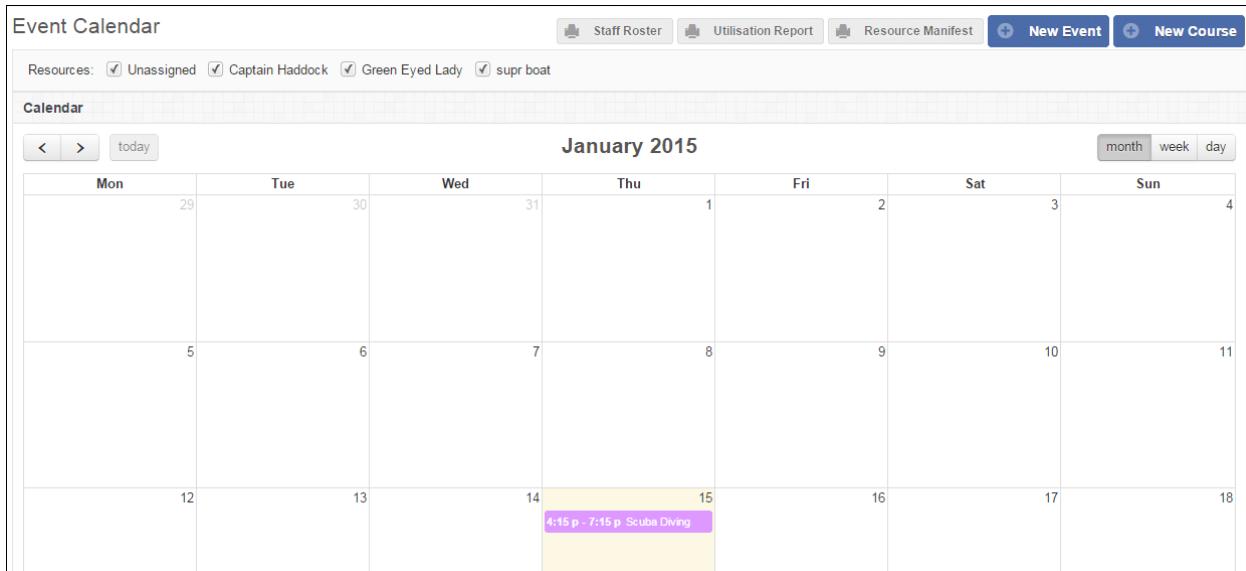
## Events

### Calendar

In the calendar you can create new events as well as course. The events and the course created are displayed in the calendar. You can also view the monthly, weekly or daily calendar.

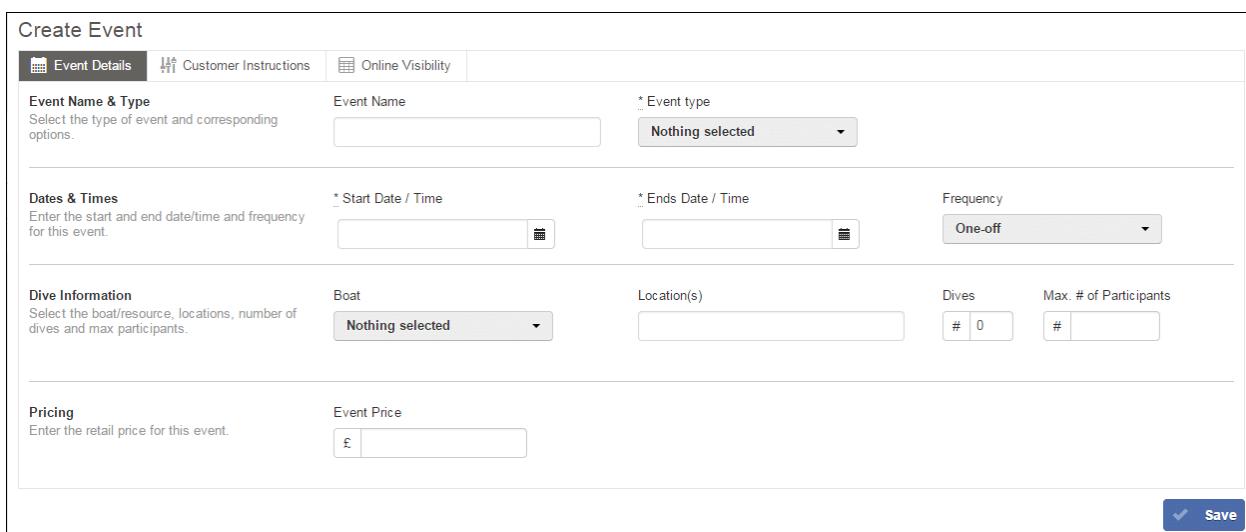
#### Creating a New Event

1. Go to **Events > Calendar**. The following page is displayed.



The screenshot shows the DiveCentreHQ Event Calendar for January 2015. The calendar grid spans from Monday, January 29, to Sunday, February 4. A specific event, "4:15 p - 7:15 p Scuba Diving", is highlighted in yellow for the afternoon of Wednesday, January 14. At the top of the calendar, there are buttons for "Staff Roster", "Utilisation Report", "Resource Manifest", "New Event" (which is highlighted in blue), and "New Course". Below the calendar, there are links for "Resources: Unassigned", "Captain Haddock", "Green Eyed Lady", and "supr boat". Navigation controls include arrows for month selection and buttons for "today", "month", "week", and "day".

2. Click **New Event**. The following page is displayed.



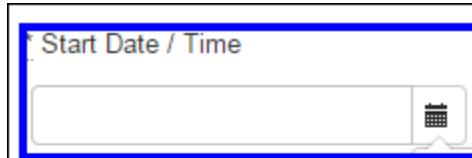
The screenshot shows the "Create Event" form. It has several tabs at the top: "Event Details" (which is selected and highlighted in dark grey), "Customer Instructions", and "Online Visibility".

- Event Name & Type:** Fields for "Event Name" (a text input box) and "Event type" (a dropdown menu set to "Nothing selected").
- Dates & Times:** Fields for "Start Date / Time" and "Ends Date / Time" (both with timepickers), and a "Frequency" dropdown set to "One-off".
- Dive Information:** Fields for "Boat" (a dropdown menu set to "Nothing selected"), "Location(s)" (a text input box), "Dives" (a text input box with "# 0"), and "Max. # of Participants" (a text input box).
- Pricing:** A field for "Event Price" with a pound sign (£) and a text input box.

At the bottom right of the form is a blue "Save" button with a checkmark icon.

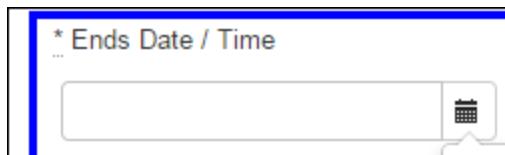
3. Event Details
-

- Event Name & Type
  - i. Enter the name of the event in the **Event Name** field.
  - ii. Select the type of event in the **Event Type** dropdown list.
- Date & Times
  - i. Click the **Start Date / Time** field to select the start date and time of the event from the calendar.



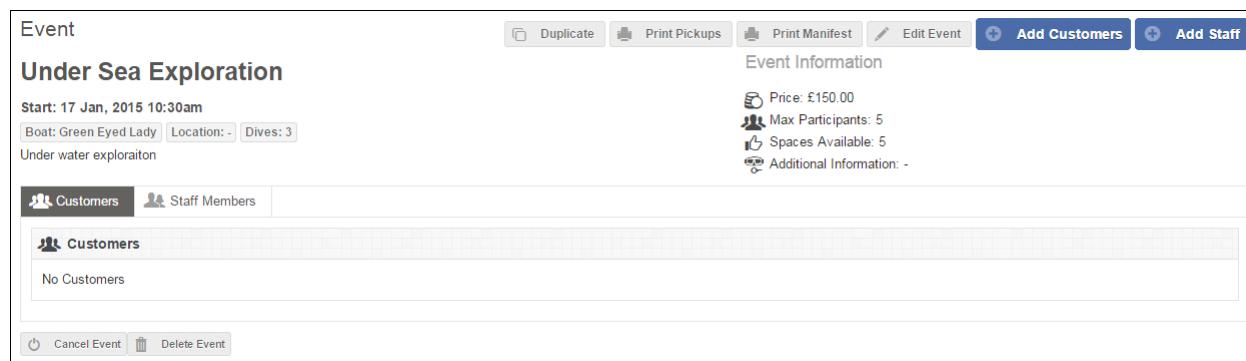
The screenshot shows a user interface for event creation. On the left, there's a text input field labeled '\* Start Date / Time' with a small calendar icon to its right. Below it is a dropdown menu for 'Boat' with the option 'Nothing selected'. Further down is a section for 'Event Price' with a currency symbol (£) and an empty input field. To the right of these fields is a date picker calendar for January 2015. The date '15' is highlighted with a red box, indicating it has been selected. Navigation arrows for the calendar are at the top, and the days of the week (Su through Sa) are listed below.

- ii. Click the **Ends Date / Time** field to select the end date and time of the event from the calendar.



This screenshot shows the same user interface as the previous one, but with a different focus. The 'Ends Date / Time' field is highlighted with a blue box. Above it is a 'Frequency' dropdown set to 'One-off'. The date picker calendar for January 2015 is visible again, with the date '15' highlighted in red. The rest of the interface, including the boat selection and price sections, is identical to the first screenshot.

- iii. Select the required frequency from the **Frequency** dropdown list.
  - Dive Information
    - i. Select the required boat from the **Boat** dropdown list.
    - ii. Select the required location(s) from the **Location(s)** dropdown list
    - iii. Enter the number of dives in the even in the **Dives** field.
    - iv. Enter the number maximum number of persons in the event in the **Max. # of Participants** field.
  - Pricing
    - i. Enter the cost of the event in the **Event Price** field.
4. Customer Instructions
- Customer Instructions
    - i. Enter the instructions to the customer for the event in the **Instructions For The Customer** field.  
**Note:** These are instructions that are sent to the customer prior to the event via email.
  - Event Notes
    - i. Enter the notes for the event in the **Event Notes** field.
  - Additional Information
    - i. Enter any additional information if any in the **Additional Information** field.
5. Online Visibility
- Online Visibility
    - i. Select the visibility of the online event from the **Online Event Visibility** dropdown list. You can select the following options:
      - Show on Public Calendar
      - Hide from Public Calendar
    - ii. Select the status of the online bookings from the **Online Bookings** dropdown list.
6. Click **Save**. This following page is displayed.



The screenshot shows the DiveCentreHQ software interface for managing events. At the top, there's a navigation bar with buttons for Duplicate, Print Pickups, Print Manifest, Edit Event, Add Customers, and Add Staff. Below the navigation, the event title is "Under Sea Exploration". The event details include: Start: 17 Jan, 2015 10:30am; Boat: Green Eyed Lady; Location: -; Dives: 3; Under water exploration. To the right, there's an "Event Information" section with icons for price (£150.00), max participants (5), spaces available (5), and additional information (-). Below the event title, there are tabs for Customers and Staff Members, with the Customers tab currently selected. The Customers tab displays a message: "No Customers". At the bottom of the screen are buttons for Cancel Event and Delete Event.

7. The event is displayed on the Event Calendar as shown.

**Event Calendar**

Resources:  Unassigned  Captain Haddock  Green Eyed Lady  supr boat

**Calendar**

January 2015

Mon	Tue	Wed	Thu	Fri	Sat	Sun
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14 4:15 p - 7:15 p Scuba Diving	15	16	17 10:30 a - 1:30 p Under Sea Exploration	18
19	20	21	22	23	24	25

**Note:** You can click the Event in the calendar to view the event details.

### Adding Customers to the Event

This option enables you to add customers to the event.

To add the customers

1. Go to **Events > Calendar**.
2. Click the required event in the calendar to view the details.
3. Click **Add Customers**. The following page is displayed.

**Add Customer to Event**

**Customer Details**

Customer  
Select the customer you want to add to this event.

+ or Quick Add New Customer

**Options**  
Select from the following options.

Assigned Staff	Kit hire	Insurance	Nitrox
Nothing selected	Nothing selected	Nothing selected	0

Free Kit Hire  Free Insurance

**Pickups**  
Enter whether the customer requires a pickup from their accommodation.

Transport	Time	Information	Day
Nothing selected			1

**Additionals**  
Select from the following additional items for this customer.

Camera Hire
No

**Note**

**Price Breakdown**

5 spaces left

Event	£150.00
Kit Hire	£0.00
Insurance	£0.00
Pickups	£0.00
Additionals	£0.00
Discount	0
<b>TOTAL</b>	<b>£150.00</b>

**Add Customer**

#### 4. Customer

- Click the Customer field to select the customer from the dropdown list.
- If the customer is not available in the list, click [Quick Add New Customer](#) to add the new customer.
- You can also do a group booking by clicking the [Switch to Group Booking](#).

#### 5. Options

- Select the staff to be assigned from the **Assigned Staff** dropdown list.
- Select the days of kit hire from the **Kit hire** dropdown list.
- Select the insurance from the **Insurance** dropdown list.
- Select the quantity of Nitrox required from the **Nitrox** dropdown list.

#### 6. Pickups

- Select the pickup point from the **Transport** dropdown list.
- Enter the time of pickup in the Time field.
- Enter any additional information if required in the Information field.

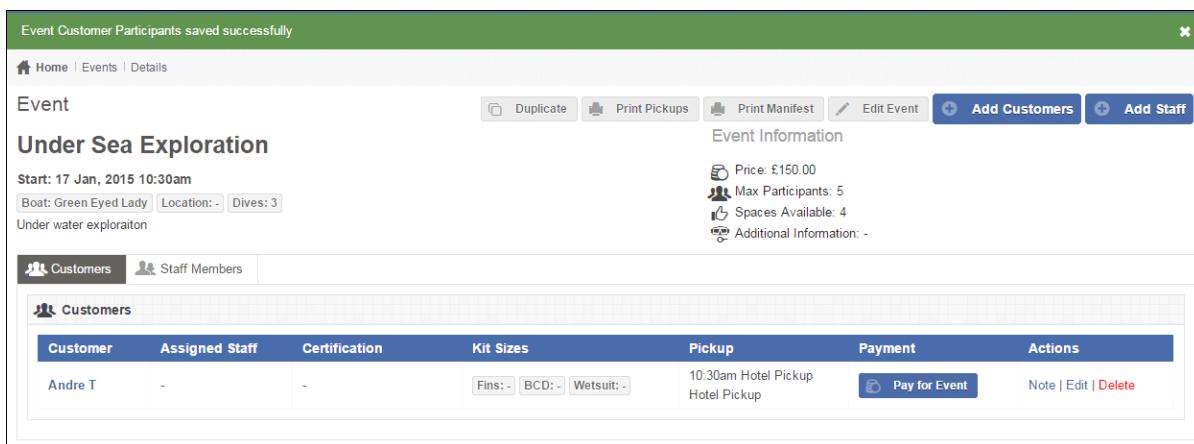
#### 7. Additionals

- Select the required option from the **Camera Hire** dropdown list.

#### 8. Note

- Enter additional notes about the customer in the **Notes** field.

#### 9. Click **Add Customer** to add the customer to the event. The following page is displayed.



The screenshot shows a software interface for managing dive events. At the top, a green header bar displays the message "Event Customer Participants saved successfully". Below this, the main content area has a white background. At the top left, there are navigation links: "Home", "Events", and "Details". To the right of these are several buttons: "Duplicate", "Print Pickups", "Print Manifest", "Edit Event", "Add Customers" (which is highlighted in blue), and "Add Staff". Below these buttons, the title "Under Sea Exploration" is displayed. Underneath the title, event details are listed: "Start: 17 Jan, 2015 10:30am", "Boat: Green Eyed Lady", "Location: -", "Dives: 3", and "Under water exploraton". To the right of these details, there are icons and text for "Price: £150.00", "Max Participants: 5", "Spaces Available: 4", and "Additional Information: -". Below this section, there are two tabs: "Customers" (which is selected) and "Staff Members". The "Customers" tab displays a table with one row of data. The table columns are: Customer, Assigned Staff, Certification, Kit Sizes, Pickup, Payment, and Actions. The data in the table is: Andre T, -, -, Fins: -, BCD: -, Wetsuit: -, 10:30am Hotel Pickup, Hotel Pickup, Pay for Event, Note | Edit | Delete. The "Actions" column contains a link to "Note | Edit | Delete".

#### Paying for the Event

1. Go to **Events > Calendar**.
2. Click the required event in the calendar to view the details. The following page is displayed.

**Event**

**Under Sea Exploration**

Start: 17 Jan, 2015 10:30am  
Boat: Green Eyed Lady | Location: - | Dives: 3  
Under water exploraiton

Price: £150.00  
Max Participants: 5  
Spaces Available: 4  
Additional Information: -

Customers	Staff Members														
<table border="1"> <thead> <tr> <th>Customer</th> <th>Assigned Staff</th> <th>Certification</th> <th>Kit Sizes</th> <th>Pickup</th> <th>Payment</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Andre T</td> <td>-</td> <td>-</td> <td>Fins: -   BCD: -   Wetsuit: -</td> <td>10:30am Hotel Pickup Hotel Pickup</td> <td> Pay for Event</td> <td>Note   Edit   Delete</td> </tr> </tbody> </table>		Customer	Assigned Staff	Certification	Kit Sizes	Pickup	Payment	Actions	Andre T	-	-	Fins: -   BCD: -   Wetsuit: -	10:30am Hotel Pickup Hotel Pickup	Pay for Event	Note   Edit   Delete
Customer	Assigned Staff	Certification	Kit Sizes	Pickup	Payment	Actions									
Andre T	-	-	Fins: -   BCD: -   Wetsuit: -	10:30am Hotel Pickup Hotel Pickup	Pay for Event	Note   Edit   Delete									

Cancel Event

3. Click **Pay for Event**. The following popup window is displayed.

**Select Cart for Sale**

**Add to New Cart**  
A new cart will be created for this customer.

**Add to New Cart**

---

**Add to Existing Cart**  
A this event will be added to an existing cart.

Andre T - #13703

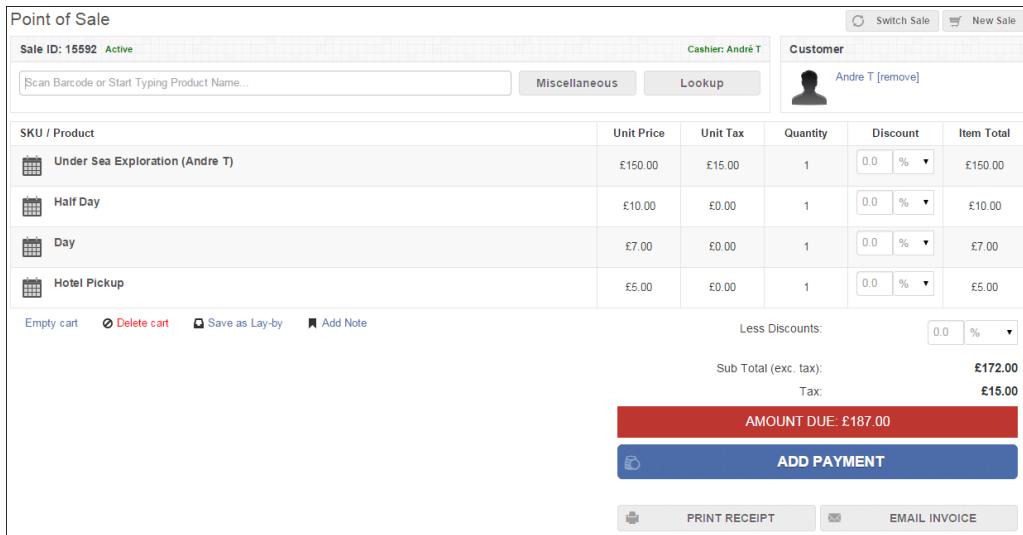
**Add to Existing Cart**

**Close**

4. Select the required option (Add to New Cart / Add to Existing Cart).

5. Add to New Cart

- The Point of Sale is created as shown.



The screenshot shows the Point of Sale interface. At the top, it displays "Sale ID: 15592 Active" and "Cashier: André T". The customer is listed as "Andre T [remove]". The cart contains four items:

SKU / Product	Unit Price	Unit Tax	Quantity	Discount	Item Total
Under Sea Exploration (Andre T)	£150.00	£15.00	1	0.0 %	£150.00
Half Day	£10.00	£0.00	1	0.0 %	£10.00
Day	£7.00	£0.00	1	0.0 %	£7.00
Hotel Pickup	£5.00	£0.00	1	0.0 %	£5.00

At the bottom, there are buttons for "Empty cart", "Delete cart", "Save as Lay-by", "Add Note", "Less Discounts" (set to 0.0%), "Sub Total (exc. tax): £172.00", "Tax: £15.00", and a large red button "AMOUNT DUE: £187.00". Below that is a blue button "ADD PAYMENT". At the very bottom are links for "PRINT RECEIPT" and "EMAIL INVOICE".

- Refer [Point of Sale](#) for more information on making payment.

### Group Booking

- Click **Switch to Group Booking**. The following fields are displayed.



The screenshot shows a "Group Details" form. It includes fields for "Group Name" (with placeholder "Enter the name of the group you want to add to this event."), "Number in Group" (set to 1), and "Contact Information". At the bottom is a button "Back to Personal Booking".

- Enter the name of the group in the **Group Name** field.
- Select the number of persons in the group in the **Number in Group** dropdown list.
- Enter the contact information of the group in the **Contact Information** field.
- To go back to personal booking, click **Back to Personal Booking**.

### Quick Adding the Customer

- Click **Quick Add New Customer**. The following popup window is displayed.

**Quick Add Customer**

Please enter the minimal amount of data required to create a customer profile. If you want to add additional information such as the customer's address, you can do this later by visiting the customer profile page.

\* First Name

\* Last Name

Email Address

[Close](#) [Add New Customer](#)

2. Enter the first name of the customer in the **First Name** field.
3. Enter the last name of the customer in the **Last Name** field.
4. Enter the email address of the customer in the **Email Address** field.
5. Click **Add New Customer**.

### Modifying the Customer Details

1. Go to **Events > Calendar**.
2. Click the required event in the calendar to view the details. The following page is displayed.

Event [Duplicate](#) [Print Pickups](#) [Print Manifest](#) [Edit Event](#) [Add Customers](#) [Add Staff](#)

**Under Sea Exploration** Event Information

Start: 17 Jan, 2015 10:30am Price: £150.00  
Boat: Green Eyed Lady Max Participants: 5  
Location: - Spaces Available: 4  
Dives: 3 Additional Information: -

[Customers](#) [Staff Members](#)

Customer	Assigned Staff	Certification	Kit Sizes	Pickup	Payment	Actions
Andre T	-	-	Fins: - BCD: - Wetsuit: -	10:30am Hotel Pickup Hotel Pickup	<a href="#">Pay for Event</a>	<a href="#">Note</a>   <a href="#">Edit</a>   <a href="#">Delete</a>

[Cancel Event](#)

3. Click the **Edit** link corresponding to the customer to be modified. The following page is displayed.

**Update Customer in Event**

<input type="checkbox"/> Customer Details		4 spaces left		
Customer	Select the customer you want to add to this event.	<input type="text"/> or Quick Add New Customer <input type="button" value="Switch to Group Booking"/>		
Options	Assigned Staff	Kit hire	Insurance	Nitrox
Selected from the following options:	Nothing selected	Half Day	Day	2
		<input type="checkbox"/> Free Kit Hire	<input type="checkbox"/> Free Insurance	
Pickups	Transport	Time	Information	Day
Enter whether the customer requires a pickup from their accommodation.	Hotel Pickup	10:30	Hotel Pickup	1
Additionals	Camera Hire			
Selected from the following additional items for this customer.	No			
Note	<input type="text"/> Pick up in the hotel for this customer			
<input type="button" value="Add Customer"/>				

4. Modify the required details and click **Add Customer**.

### Deleting the Customer

1. Go to **Events > Calendar**.
2. Click the required event in the calendar to view the details. The following page is displayed.

**Event**

**Under Sea Exploration**

Start: 17 Jan, 2015 10:30am

Boat: Green Eyed Lady | Location: - | Dives: 3

Under water exploraiton

Duplicate  Print Pickups  Print Manifest  Edit Event  Add Customers  Add Staff

**Event Information**

- Price: £150.00
- Max Participants: 5
- Spaces Available: 4
- Additional Information: -

Customers  Staff Members

**Customers**

Customer	Assigned Staff	Certification	Kit Sizes	Pickup	Payment	Actions
Andre T	-	-	Fins: -   BCD: -   Wetsuit: -	10:30am Hotel Pickup Hotel Pickup	<input type="button"/> Pay for Event	<a href="#">Note</a>   <a href="#">Edit</a>   <a href="#">Delete</a>

Cancel Event

3. Click the **Delete** link corresponding to the customer to be deleted. The following popup window is displayed.

**Remove Customer from Event**

Send email notification to customer

Close

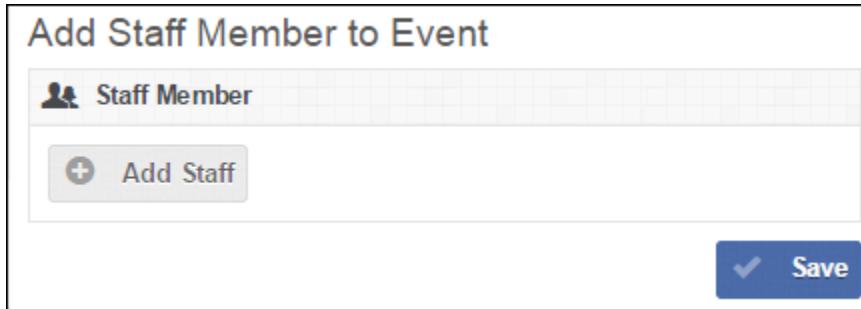
4. If you want to send an email notification to the customer about the deletion, select the **Send email notification to customer** checkbox.
  5. Click **Remove Customer from Event**.
-

## Adding Staff

This option enables you to add staff to the event.

To add the staff

1. Go to **Events > Calendar**.
2. Click the required event in the calendar to view the details.
3. Click **Add Staff**. The following page is displayed.

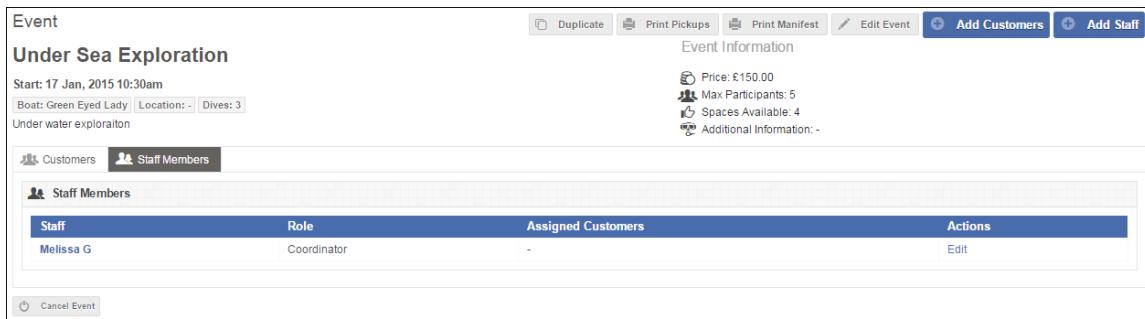


4. Click **Add Staff**. The following fields are displayed.



5. Select the user from the **User** dropdown list.
6. Enter the role of the staff in the **Role** field.
7. Click **Save**. The staff is displayed in the **Staff Members** tab as shown.

**Note:** You can add more than one staff to an event.



## Modifying Staff

1. Click **Edit** link corresponding to the staff to be modified. The following page is displayed.

Add Staff Member to Event

**Staff & Role**  
Select the staff member and enter their role.

* User	* Role
Melissa G	Coordinator

[Delete](#)

[Add Staff](#)

[Save](#)

2. Modify the required details and click **Save**.
3. To delete the staff, click **Delete** link corresponding to the staff member.

## Modifying the Event

This option enables you to modify the details of the event.

To modify the event

1. Go to **Events > Calendar**.
2. Click the required event in the calendar to view the details. The following page is displayed.

Event

[Duplicate](#) [Print Pickups](#) [Print Manifest](#) [Edit Event](#) [Add Customers](#) [Add Staff](#)

**Under Sea Exploration**

Start: 17 Jan, 2015 10:30am

Boat: Green Eyed Lady | Location: - | Dives: 3

Under water exploraiton

**Event Information**

- Price: £150.00
- Max Participants: 5
- Spaces Available: 4
- Additional Information: -

[Customers](#) [Staff Members](#)

**Customers**

Customer	Assigned Staff	Certification	Kit Sizes	Pickup	Payment	Actions
Andre T	-	-	Fins: -   BCD: -   Wetsuit: -	10:30am Hotel Pickup Hotel Pickup	<a href="#">Pay for Event</a>	<a href="#">Note</a>   <a href="#">Edit</a>   <a href="#">Delete</a>

[Cancel Event](#)

3. Click the **Edit Event**. The following page is displayed.

Update Event

[Event Details](#) [Customer Instructions](#) [Online Visibility](#)

**Event Name & Type**  
Select the type of event and corresponding options.

Event Name	* Event type
Under Sea Exploration	Trip

**Dates & Times**  
Enter the start and end date/time and frequency for this event.

* Start Date / Time	* Ends Date / Time
17-01-2015 10:30	17-01-2015 13:30

**Dive Information**  
Select the boat/resource, locations, number of dives and max participants.

Boat	Location(s)	Dives	Max. # of Participants
Green Eyed Lady		# 3	# 5

**Pricing**  
Enter the retail price for this event.

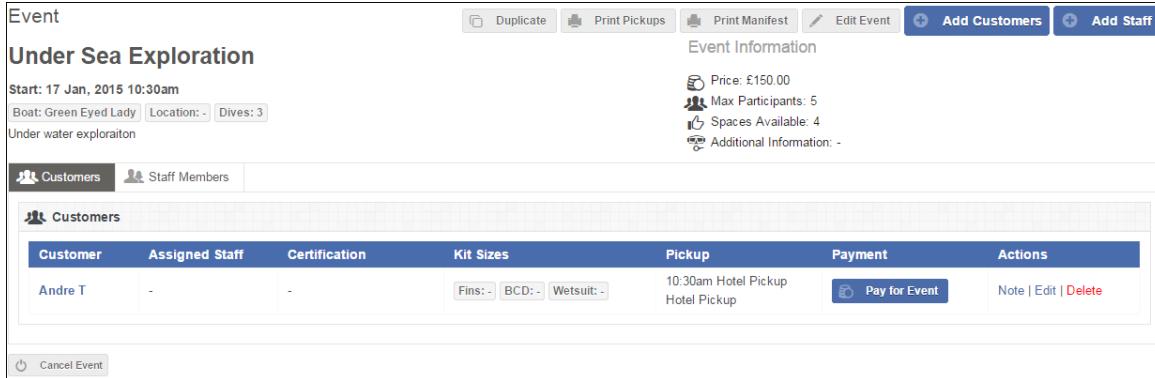
Event Price
£ 150.00

[Save](#)

4. Modify the required details and click **Save**.

### Printing the Pickup List

1. Go to **Events > Calendar**.
2. Click the required event in the calendar to view the details. The following page is displayed.



**Event**

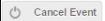
**Under Sea Exploration**

Start: 17 Jan, 2015 10:30am  
Boat: Green Eyed Lady | Location: - | Dives: 3  
Under water exploraiton

Price: £150.00 | Max Participants: 5 | Spaces Available: 4 | Additional Information: -

**Customers** | **Staff Members**

Customer	Assigned Staff	Certification	Kit Sizes	Pickup	Payment	Actions
Andre T	-	-	Fins: -   BCD: -   Wetsuit: -	10:30am Hotel Pickup Hotel Pickup		Note   Edit   Delete



3. Click the **Print Pickups**. The following tab is displayed.



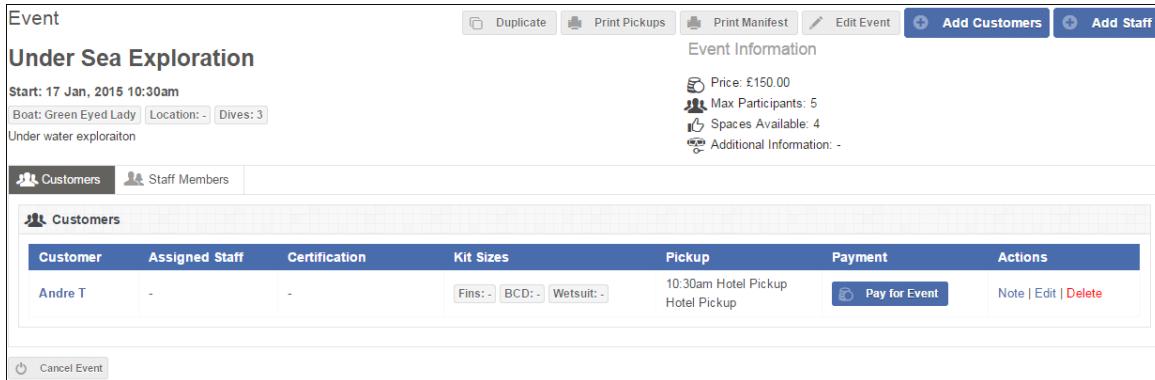
**Today's Pickups**

Name	Location	Time
Andre T	Hotel Pickup	10:30

4. Right click and select **Print** from the context menu to print the pickup list.

### Printing the Manifest

1. Go to **Events > Calendar**.
2. Click the required event in the calendar to view the details. The following page is displayed.



**Event**

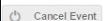
**Under Sea Exploration**

Start: 17 Jan, 2015 10:30am  
Boat: Green Eyed Lady | Location: - | Dives: 3  
Under water exploraiton

Price: £150.00 | Max Participants: 5 | Spaces Available: 4 | Additional Information: -

**Customers** | **Staff Members**

Customer	Assigned Staff	Certification	Kit Sizes	Pickup	Payment	Actions
Andre T	-	-	Fins: -   BCD: -   Wetsuit: -	10:30am Hotel Pickup Hotel Pickup		Note   Edit   Delete



3. Click the **Print Manifest**. The following tab is displayed.

**Resource Manifest:**  
Staff: Melissa G  
Date / Time: 17 Jan, 2015 10:30am - 17 Jan, 2015 01:30pm

Customer	Pickup	Activity	Cert	Dives	Weight	Reg	BCD	Fins	Mask	Wetsuit	Emergency	Nitrox
Andre T	Hotel Pickup - 10:30	Under Sea Exploration	-	0		Rental			Rental		-	1

**Locations:**

**Event Notes (internal):**  
Under water exploraiton

**Notes / Incidents:**

Rental BCDs					
Jr	Xs	S	M	L	XL
-	-	-	-	-	-

Fins						
Jr	4/5	6/7	8/9	10/11	12/13	14/15
-	-	-	-	-	-	-

Weight Total 0.0 Masks 1

- Right-click and select **Print** from the context menu.

### Duplicating the Event

This option enables you to duplicate the event.

- Go to **Events > Calendar**.
- Click the required event in the calendar to view the details. The following page is displayed.

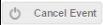
**Event**

**Under Sea Exploration**

Start: 17 Jan, 2015 10:30am  
Boat: Green Eyed Lady | Location: - | Dives: 3  
Under water exploraiton

Price: £150.00 | Max Participants: 5 | Spaces Available: 4 | Additional Information: -

Customers	Staff Members														
<b>Customers</b>															
<table border="1"> <thead> <tr> <th>Customer</th> <th>Assigned Staff</th> <th>Certification</th> <th>Kit Sizes</th> <th>Pickup</th> <th>Payment</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Andre T</td> <td>-</td> <td>-</td> <td>Fins: -   BCD: -   Wetsuit: -</td> <td>10:30am Hotel Pickup Hotel Pickup</td> <td></td> <td>Note   Edit   Delete</td> </tr> </tbody> </table>	Customer	Assigned Staff	Certification	Kit Sizes	Pickup	Payment	Actions	Andre T	-	-	Fins: -   BCD: -   Wetsuit: -	10:30am Hotel Pickup Hotel Pickup		Note   Edit   Delete	
Customer	Assigned Staff	Certification	Kit Sizes	Pickup	Payment	Actions									
Andre T	-	-	Fins: -   BCD: -   Wetsuit: -	10:30am Hotel Pickup Hotel Pickup		Note   Edit   Delete									



- Click **Duplicate**. The following popup window displayed.

**Duplicate Event & Participants**

By duplicating this event, you will also be adding the same customers to the new event.

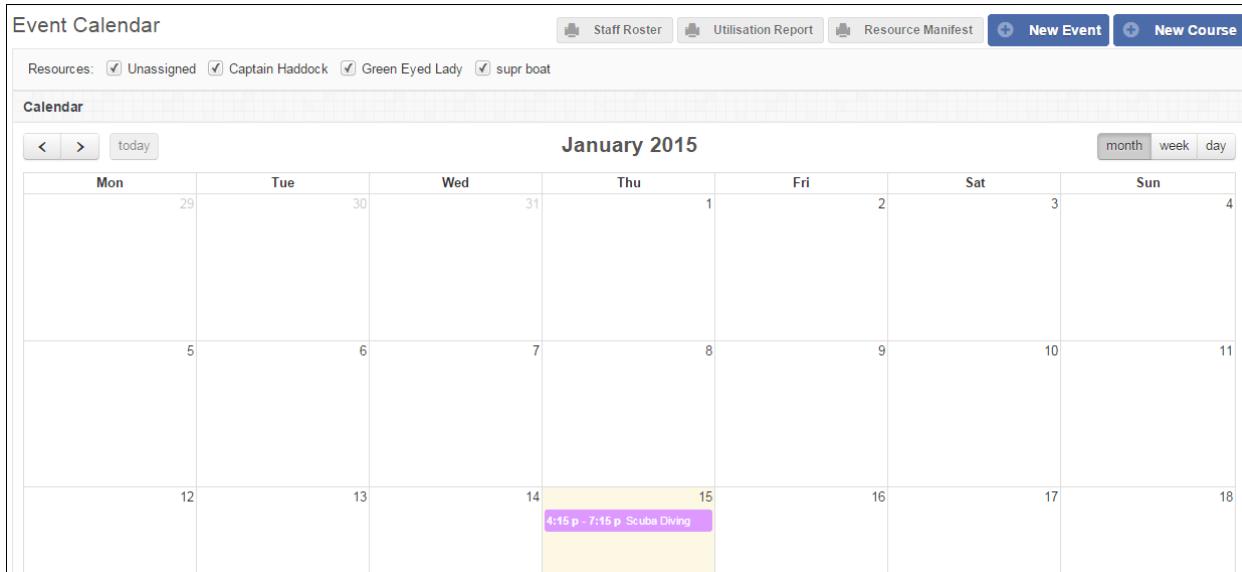
**Start Date/Time**      **End Date/Time**  

**Cancel** **Duplicate Event & Participants**

- Click the **Start Date / Time** field to select the start date and time of the event from the calendar.
- Click the **End Date / Time** field to select the end date and time of the event from the calendar.
- Click **Duplicate Event & Participants**.

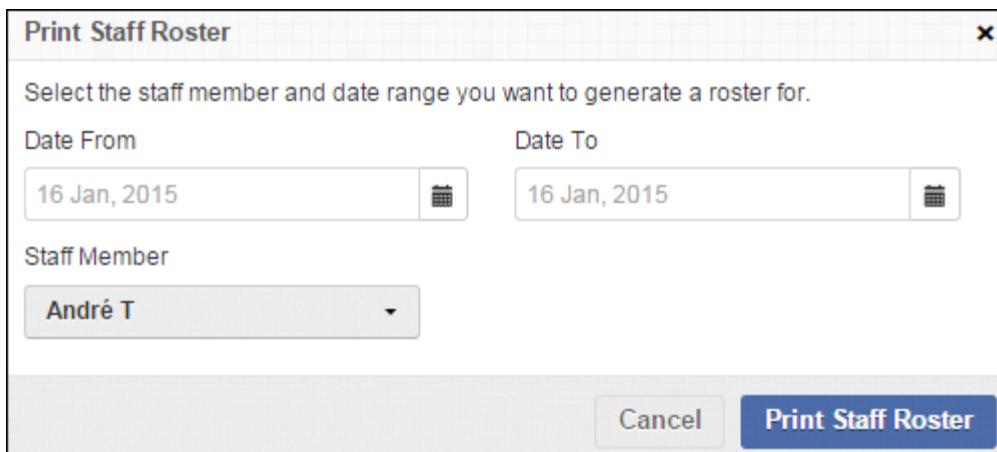
### Printing the Staff Roster

1. Go to **Events > Calendar**. The following page is displayed.



The screenshot shows the DiveCentreHQ Event Calendar for January 2015. The calendar grid spans from Monday, January 26, to Sunday, February 1. A specific event is highlighted in yellow for the dates January 14 and January 15, with the text "4:15 p - 7:15 p Scuba Diving" overlaid on the yellow area. The top navigation bar includes links for Staff Roster, Utilisation Report, Resource Manifest, New Event, and New Course.

2. Click **Staff Roster**. The following popup window is displayed.



The screenshot shows the "Print Staff Roster" dialog box. It includes fields for "Date From" (set to 16 Jan, 2015) and "Date To" (set to 16 Jan, 2015). Below these is a "Staff Member" dropdown menu showing "André T". At the bottom are "Cancel" and "Print Staff Roster" buttons.

3. Click the **Date From** field to select the from date from the calendar.
4. Click the **Date To** field to select the to date from the calendar.
5. Select the staff from Staff Member dropdown list.
6. Click **Print Staff Roster**.

### Printing the Utilization Report

1. Go to **Events > Calendar**. The following page is displayed.

Event Calendar

Resources:  Unassigned  Captain Haddock  Green Eyed Lady  supr boat

Calendar

January 2015

Mon	Tue	Wed	Thu	Fri	Sat	Sun
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18

4:15 p - 7:15 p Scuba Diving

- Click **Utilization Report**. The following popup window is displayed.

**Print Resource Utilisation Report**

Select the date range you wish to generate a report for.

Date From                      Date To

16 Jan, 2015                    23 Jan, 2015

**Print Resource Utilisation Report**

- Click the **Date From** field to select the from date from the calendar.
- Click the **Date To** field to select the to date from the calendar.
- Click **Print Resource Utilisation Report**.

#### Printing the Resource Manifest

- Go to **Events > Calendar**. The following page is displayed.

Event Calendar

Resources:  Unassigned  Captain Haddock  Green Eyed Lady  supr boat

Calendar

January 2015

Mon	Tue	Wed	Thu	Fri	Sat	Sun
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18

4:15 p - 7:15 p Scuba Diving

- Click **Resource Manifest**. The following popup window is displayed.

**Print Resource Manifest**

Select the resource and date range you want to generate a manifest for.

Date From                      Date To

16 Jan, 2015                    16 Jan, 2015

Resource

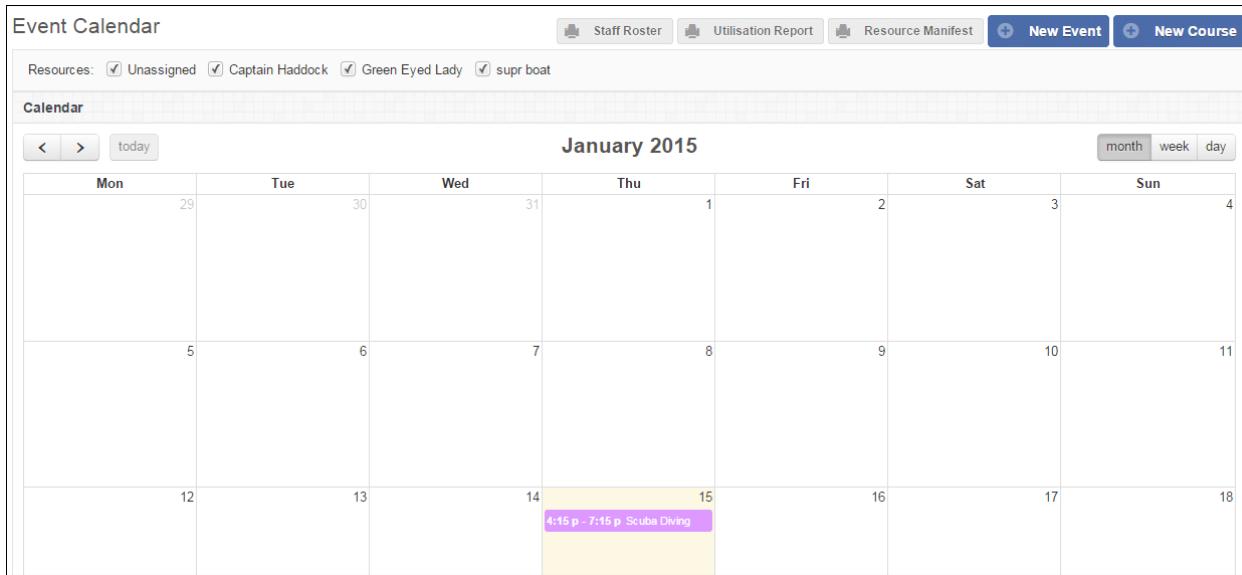
Captain Haddock

**Cancel**    **Print Resource Manifest**

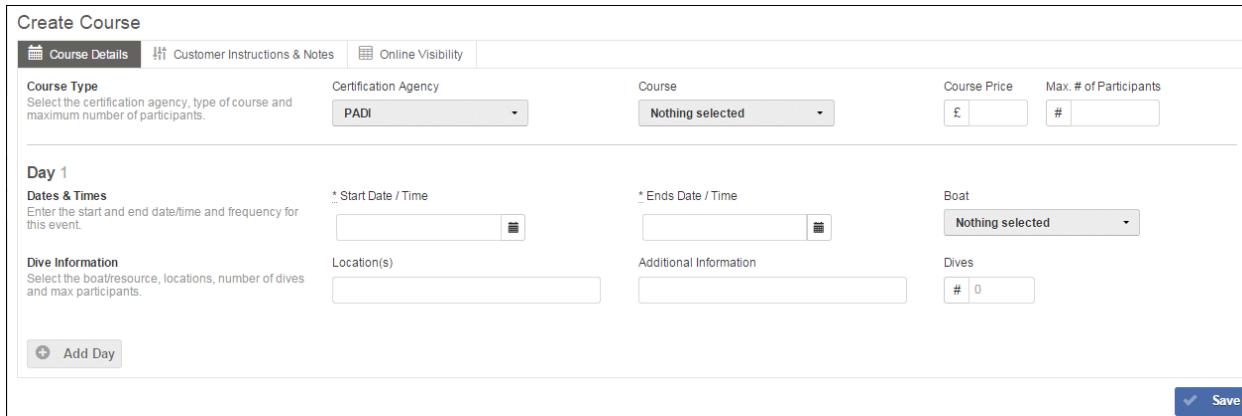
- Click the **Date From** field to select the from date from the calendar.
- Click the **Date To** field to select the to date from the calendar.
- Select the resource from the **Resource** dropdown list.
- Click **Print Resource Manifest**.

### Creating New Course

- Go to **Events > Calendar**. The following page is displayed.



2. Click **New Course**. The following page is displayed.



**Create Course**

**Course Details**   **Customer Instructions & Notes**   **Online Visibility**

<b>Course Type</b> Select the certification agency, type of course and maximum number of participants.	<b>Certification Agency</b> PADI	<b>Course</b> Nothing selected	<b>Course Price</b> £	<b>Max. # of Participants</b> #
<b>Day 1</b> <b>Dates &amp; Times</b> Enter the start and end date/time and frequency for this event.		<b>Start Date / Time</b> 4:15 p	<b>Ends Date / Time</b> 7:15 p	<b>Boat</b> Nothing selected
<b>Dive Information</b> Select the boat/resource, locations, number of dives and max participants.		<b>Location(s)</b>	<b>Additional Information</b>	<b>Dives</b> # 0
<b>Add Day</b>		<b>Save</b>		

### 3. Course Details

- **Course Type**
  - i. Select the certification agency from the **Certification Agency** dropdown list.
  - ii. Select the course from the **Course** dropdown list.
  - iii. Enter the price of the course in the **Course Price** dropdown list.
  - iv. Enter the maximum number of participants in the course in the **Max. # of Participants** field.
- **Day**
  - i. **Dates & Times**
    - Click the **Start Date / Time** field to select the start date / time of the course.
    - Click the **End Date / Time** field to select the end date / time of the course.
    - Select the required boat from the **Boat** dropdown list.
  - ii. **Dive Information**
    - Enter the location of the dive in the **Location** field.

- Enter any additional information related to the course in the **Additional Information** field.
- Enter the number of dives in the **Dives** field.
- To add another day, click **Add Day**.

#### 4. Customer Instructions and Notes

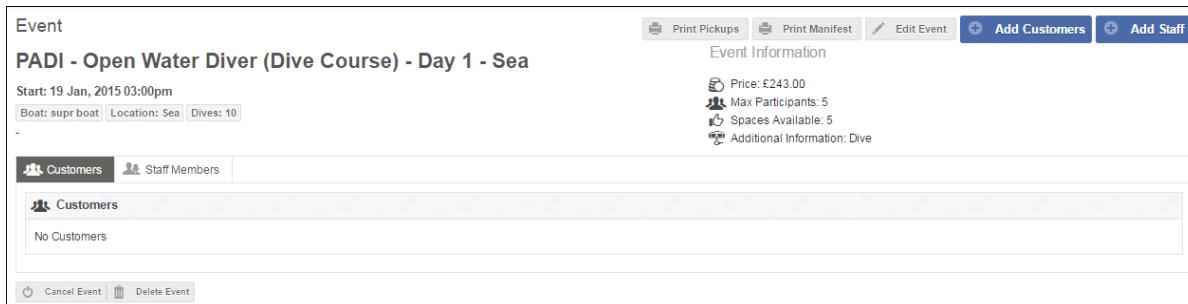
- Customer Instructions
  - i. Enter the instructions to the customer for the course in the **Instructions For The Customer** field.

**Note:** These are instructions that are sent to the customer prior to the event via email.
- Course Notes
  - i. Enter the notes for the course in the **Event Notes** field.

#### 8. Online Visibility

- Online Visibility
  - i. Select the visibility of the online event from the **Online Event Visibility** dropdown list. You can select the following options:
    - Show on Public Calendar
    - Hide from Public Calendar
  - i. Select the status of the online bookings from the **Online Bookings** dropdown list.

5. Click **Save** to create a course. The following page is displayed.



The screenshot shows the DiveCentreHQ software interface for managing events. The main title is "PADI - Open Water Diver (Dive Course) - Day 1 - Sea". Key details include:
 

- Start: 19 Jan, 2015 03:00pm
- Boat: supr boat
- Location: Sea
- Dives: 10

 Event details:
 

- Price: £243.00
- Max Participants: 5
- Spaces Available: 5
- Additional Information: Dive

 Customer and Staff sections:
 

- Customers: No Customers
- Staff Members: No Staff Members

 Action buttons at the bottom:
 

- Print Pickups
- Print Manifest
- Edit Event
- Add Customers
- Add Staff
- Cancel Event
- Delete Event

6. Refer [Adding Customers](#) for information on adding customers to the course.
7. Refer [Adding Staff](#) for information on adding staffs to the course.
8. Refer [Printing Pickups](#) for information on printing the pickup time.
9. Refer [Printing Manifest](#) for information on printing the manifest.

#### List

This section displays the list of available courses as well as events. You can click the event / course link to view the details.

Refer to [staff roster](#), [utilisation report](#), [resource manifestation](#), [new event](#), and [new course](#) for more information.

## CRM

### Customers

This option enables you to create new customers as well as modify the details of the existing customers.

#### Creating a New Customer

1. Go to **CRM > Customers**. The following page is displayed.

Customers							 Sync to MailChimp	 Export Customer Records	 New Customer
Customer Records									
Name	Phone	Email	Location	Certification	Tags	Sales			
Test McTester		andre+testmctester@oceanshq.com				£0.00			
Andre T		andre@oceanshq.com	test test test 12 Åland Islands			£187.00			
fdaf fdasgda						£0.00			
Erez King	123-456-7890	andre+1@oceanshq.com	987 Hill Street - Palm Beach ACT 4221	SSI Try Scuba Diving #0 (2011-12-06)	Inst: CE	-£68.95			
Lone Light	377495140949	ione.light@gmail.com	1599 Pennsylvania Ave Washington DC 98052 United States			£558.64			
Walk In	000-000-0000	walkin@divecentrehq.com				£57,115.96			
Adrian Higgins	634-213-3213	adrian@divecentrehq.com	432 Some Street Sydney New South Wales 2011	#986123 (2012-03-21)	Inst: CE	£0.00			
Josh Parker	124-567-8901	josh@demo.com	1/5 John Street - Karratha WA 6714	#0 (2012-03-04)	Inst: CE	£25.00			
Jacob Vercoe	543-231-3214	jacob@demo.com	12 Near Road - Coffe Harbour jetty NSW 2450	#0 (2012-02-07)	Inst: CE	£104.50			
Matthew Cavalieri	832-324-0323	matthew@demo.com	9 Quirk Street - Sydney NSW 2093	PADI Rescue Diver #123456 (2012-02-07)	Inst: CE	£0.00			
Brett Miller	808-123-4567	brett@demo.com	65 Green Road - Manly NSW 2101	#0 (2012-02-07)	Inst: CE	£0.00			
Marcus Kapnoullas	818-321-4314	marcus@demo.com	81 Eve Terrace - Frankston Heights VIC 3199	#0 (2012-01-14)	Inst: CE	£0.00			
Paul Kyriakoulis	302-321-4314	paul@demo.com	123 Esplanade - Mornington VIC 3931	#0 (2012-01-14)	Inst: CE	£0.00			
Jon Kouyias	301-431-4315	jon@demo.com	1 Wilshire Street - Richmond VIC 3121	#123457 (2012-01-14)	Inst: CE	£110.00			
Peter Kearney	453-431-4315	peter@demo.com	43 Garfield Tce - Surfers Paradise QLD 4217	#0 (2012-03-15)	Inst: CE	£0.00			
Mark Byrne	728-392-8291	mark@demo.com	515 Marine Parade - Gold Coast QLD 4220	#0 (2012-03-16)	Inst: CE	£0.00			
John Bott	711-193-1934	john@demo.com	60 Moorooka Road - Brisbane QLD 4105	#0 (2012-03-17)	Inst: CE	£0.00			
Ben Mattes	829-193-1934	ben@demo.com	91 Alfred Road - Mermaid Beach QLD 4218	#123458 (2012-03-18)	Inst: CE	£0.00			
Gavin Clarke	980-921-2134	gavin@demo.com	431 Cambridge Tce - Surfers Paradise QLD 4217	#0 (2012-03-19)	Inst: CE	£0.00			

2. Click **New Customer**. The following page is displayed.

Create Customer					
<input type="checkbox"/> Personal Details	<input type="checkbox"/> Address	<input type="checkbox"/> Experience & Certifications	<input type="checkbox"/> Dive Equipment	<input type="checkbox"/> * Custom Data	
<b>Name &amp; Date of Birth</b> Enter the customer's name and date of birth.		* First Name <input type="text"/>	* Last Name <input type="text"/>	Date of Birth <input type="text"/>	Gender <input type="radio"/> Male
<b>Contact Details</b> Enter the email address and phone numbers for this customer.		Email Address <input type="text"/>	Phone <input type="text"/>	Mobile <input type="text"/>	
<input checked="" type="checkbox"/> Send Event Related Emails					
<b>Photo</b> Upload a photo of the customer.	Upload File <input type="file"/>	Select File <input type="button" value="Select File"/>			
<b>Extra Information</b> Include customer source, default discounts and tags.		Source <input type="text"/>	Discount % <input type="text" value="0.0"/>	Tax ID <input type="text"/>	Tax exempt <input type="checkbox"/> Zero Rate Tax
Tags <input type="text"/>					
<b>Emergency Contact</b> In the event of emergency.		Emergency Contact Details <input type="text"/>			
<input type="button" value="Save"/>					

3. Personal Details

- **Name & Date of Birth**
  - i. Enter the first name of the customer in the **First Name** field.
  - ii. Enter the last name of the customer in the **Last Name** field.

- iii. Click the **Date of Birth** field to select the date of birth of the customer from the calendar.
  - iv. Select the gender of the customer from the **Gender** dropdown list.
  - Contact Details
    - i. Enter the email address of the customer in the **Contact Details** field.
    - ii. Enter the phone number in the **Phone Number** field.
    - iii. Enter the mobile number of the customer in the **Mobile** field.
    - iv. To send emails related to the event, select the **Send Event Related Emails** checkbox.
  - Photo
    - i. Click **Select File** to upload the photo of the customer.
  - Extra Information
    - i. Enter the source in the **Source** field.
    - ii. Enter the discount percentage in the **Discount %** field.
    - iii. Enter the tax ID of the customer in the **Tax ID** field.
    - iv. If there is a tax exempt for the customer, select the **Zero Rate Tax** checkbox.
    - v. Enter the related tags in the **Tags** field.
  - Emergency contact
    - i. Enter the emergency contact details of the customer in the **Emergency Contact Details** field.
4. Address
- Address Details
    - i. Enter the address of the customer in the **Address 1 / Address 2** fields.
    - ii. Enter the city of residence in the **City** field.
    - iii. Enter the state in the **State** field.
    - iv. Select the country from the **Country** dropdown list.
    - v. Enter the postal code in the **Post Code** field.
  - Current Accommodation
    - i. Enter the name of the hotel in the **Hotel Name** field.
    - ii. Enter the room number in the **Room Number** field.
5. Experience & Certifications
- Dive Experience
    - i. Select the experience of the customer from the **Customer Experience Level** dropdown list.
    - ii. Click the **Last Dive** field to select the date of the last dive from the calendar.
    - iii. Enter the logged number of dives in the **Logged Dives** field.
  - Add Certifications
    - i. Click **Add Certification** to add a new certification. The following fields are displayed.
- 
- ii. Select the certification agency from the **Certification Agency** dropdown list.
  - iii. Select the certification level from the **Certification Level** dropdown list.

- iv. Click the **Certification Date** field to select the date of the certification from the calendar.
- v. Enter the id of the certificate in the **Cert ID** field.
- vi. If you want to make this certification as the primary, select **Primary** checkbox.

**Note:** You can add more than one certification by clicking the Add Certification button.

## 6. Dive Equipment

- Dive Equipment
  - i. Select the fins from the Fins dropdown list.
  - ii. Select the BCD from the BCD dropdown list.
  - iii. Enter the required number of wetsuit in the Wetsuit field.
  - iv. Enter the weight in the Weight field.

**Note:** For all the above listed equipment, select the required option (own / rent) to indicate if it is a rented or own equipment.

## 7. Custom Data

- Custom Fields
  - i. Click **Add Custom Field**. The following fields are displayed.

Custom Fields  
Add any custom data sets for this customer.

* Field Name <input type="text"/>	Value <input type="text"/>	<input style="background-color: #e0e0e0; border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;" type="button" value="Remove"/>
<input style="background-color: #e0e0e0; border: 1px solid #ccc; padding: 2px 10px;" type="button" value="+ Add Custom Field"/>		

- ii. Enter the name of the field in the Field Name field.
- iii. Enter the value for the field in the Value field.

**Note:** You can add more than one custom field.

## 8. Click **Save**. This creates the customer.

### Modifying the Customer

This option enables you to modify the details of the existing customer.

1. Go to **CRM > Customers**. The following page is displayed.

## User Manual

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Customers							
<a href="#">Sync to MailChimp</a>   <a href="#">Export Customer Records</a>   <a href="#">New Customer</a>							
Name	Phone	Email	Location	Certification	Tags	Sales	
Test McTester		andre+testmctester@oceanshq.com				£0.00	
Andre T		andre@oceanshq.com	test test test 12 Aland Islands			£187.00	
fdaf fdasgda						£0.00	
Erez King	123-456-7890	andre+1@oceanshq.com	987 Hill Street - Palm Beach ACT 4221	SSI Try Scuba Diving #0 (2011-12-06)	Inst CE	-£68.95	
Lone Light	377495140949	lone.light@gmail.com	1599 Pennsylvania Ave Washington DC 98052 United States			£558.64	
Walk In	000-000-0000	walkin@divecentrehq.com				£57,115.96	
Adrian Higgins	634-213-3213	adrian@divecentrehq.com	432 Some Street Sydney New South Wales 2011	#986123 (2012-03-21)	Inst CE	£0.00	
Josh Parker	124-567-8901	josh@demo.com	1/5 John Street - Karratha WA 6714	#0 (2012-03-04)	Inst CE	£25.00	
Jacob Vercoe	543-231-3214	jacob@demo.com	12 Near Road - Coffs Harbour Jetty NSW 2450	#0 (2012-02-07)	Inst CE	£104.50	
Matthew Cavalieri	832-324-0323	matthew@demo.com	9 Quirk Street - Sydney NSW 2003	PADI Rescue Diver #123456 (2012-02-07)	Inst CE	£0.00	
Brett Miller	808-123-4567	brett@demo.com	65 Green Road - Manly NSW 2101	#0 (2012-02-07)	Inst CE	£0.00	
Marcus Kapnoullas	818-321-4314	marcus@demo.com	81 Eve Terrace - Frankston Heights VIC 3199	#0 (2012-01-14)	Inst CE	£0.00	
Paul Kyriakoullas	302-321-4314	paul@demo.com	123 Esplanade - Mornington VIC 3931	#0 (2012-01-14)	Inst CE	£0.00	
Jon Kouyias	301-431-4315	jon@demo.com	1 Wilshire Street - Richmond VIC 3121	#123457 (2012-01-14)	Inst CE	£110.00	
Peter Kearney	453-431-4315	peter@demo.com	43 Garfield Tce - Surfers Paradise QLD 4217	#0 (2012-03-15)	Inst CE	£0.00	
Mark Byrne	728-392-8291	mark@demo.com	515 Marine Parade - Gold Coast QLD 4220	#0 (2012-03-16)	Inst CE	£0.00	
John Bott	711-193-1934	john@demo.com	60 Moorooka Road - Brisbane QLD 4105	#0 (2012-03-17)	Inst CE	£0.00	
Ben Mattes	829-193-1934	ben@demo.com	91 Alfred Road - Mermaid Beach QLD 4218	#123458 (2012-03-18)	Inst CE	£0.00	
Gavin Clarke	980-921-2134	gavin@demo.com	431 Cambridge Tce - Surfers Paradise QLD 4217	#0 (2012-03-19)	Inst CE	£0.00	

2. Click the name link of the customer to be modified. The following page is displayed.

**Test McTester**

Contact Information

**Address:** -  
Email: andre+testmctester@oceanshq.com  
Ph: -  
Mob: -

**Emergency Contact:** -

Add Customer to Event

New Note

New Incident

Edit Customer

**Customer Data**

Last Dive: -  
Date of Birth: 01 Sep, 1980  
Gender: Male  
Source: -  
\* Discount: 0.0 %

Hotel: -  
Credit: £0.00  
Created: 08 Sep, 2014 06:34pm  
Updated: 08 Sep, 2014 06:34pm  
Tags: -

Overview     Sales     Events     Credit Notes     Customer Notes     Incidents

Dive Credentials		Dive Equipment	
No Certifications		Fins	Rental
		BCD	Rental
		Wetsuit	Rental
		Mask	Rental
		Regulator	Rental
		Weight	-

Delete Customer

3. Click **Edit Customer**. The following page is displayed.

**Edit Customer**

Personal Details     Address     Experience & Certifications     Dive Equipment     Custom Data

**Name & Date of Birth**  
Enter the customer's name and date of birth.

First Name	Last Name	Date of Birth	Gender
Test	McTester	01-09-1980	Male

**Contact Details**  
Enter the email address and phone numbers for this customer.

Email Address	Phone	Mobile
andre+testmctester@oceanshq.com		

Send Event Related Emails

**Photo**  
Upload a photo of the customer.

**Extra Information**  
Include customer source, default discounts and tags.

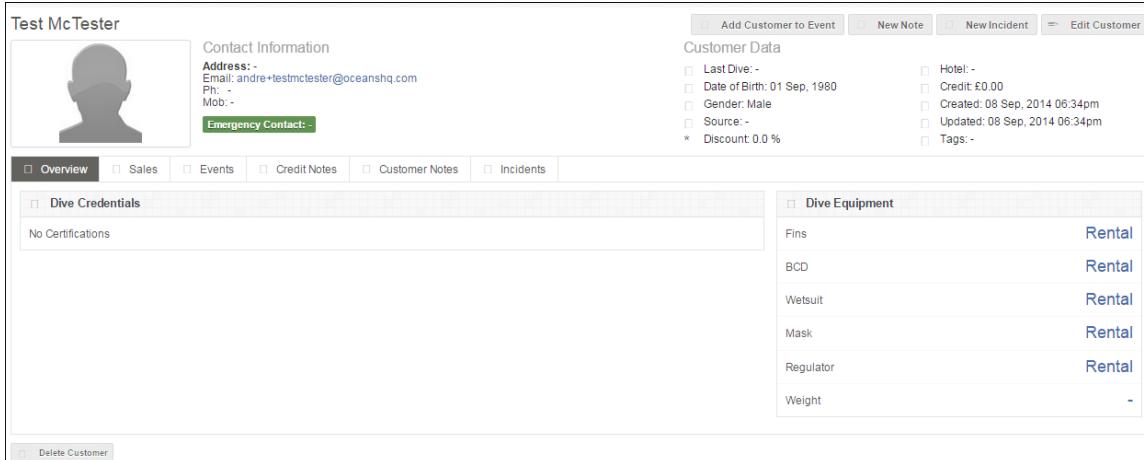
**Emergency Contact**  
In the event of emergency.

Save

4. Modify the required details and click **Save**.

### [Adding a Customer to the Event](#)

1. Go to **CRM > Customers**.
2. Click the name link of the customer to be modified. The following page is displayed.

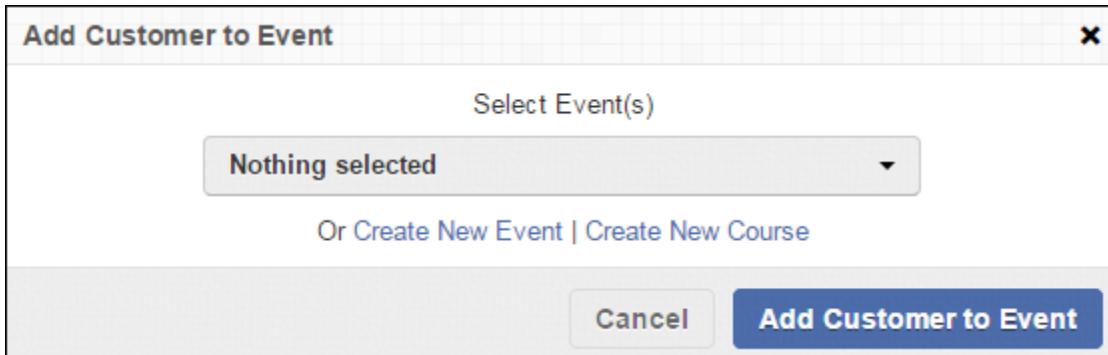


This screenshot shows the DiveCentreHQ CRM customer profile page for 'Test McTester'. The top navigation bar includes links for 'Add Customer to Event', 'New Note', 'New Incident', and 'Edit Customer'. The main content area is divided into several sections:

- Contact Information:** Shows a placeholder profile picture, address (Address: -, Email: andrew@oceanhq.com), phone (Ph: -), mobile (Mob: -), and emergency contact (Emergency Contact: -).
- Customer Data:** Includes fields for Last Dive, Date of Birth (01 Sep, 1980), Gender (Male), Source, Hotel, Credit (£0.00), Created (08 Sep, 2014 06:34pm), Updated (08 Sep, 2014 06:34pm), and Tags.
- Dive Credentials:** A table showing 'No Certifications'.
- Dive Equipment:** A table listing rental items: Fins (Rental), BCD (Rental), Wetsuit (Rental), Mask (Rental), Regulator (Rental), and Weight (Rental).

At the bottom left is a 'Delete Customer' button, and at the bottom right is a 'Delete' button.

3. Click **Add Customer to Event**. The following popup window is displayed.

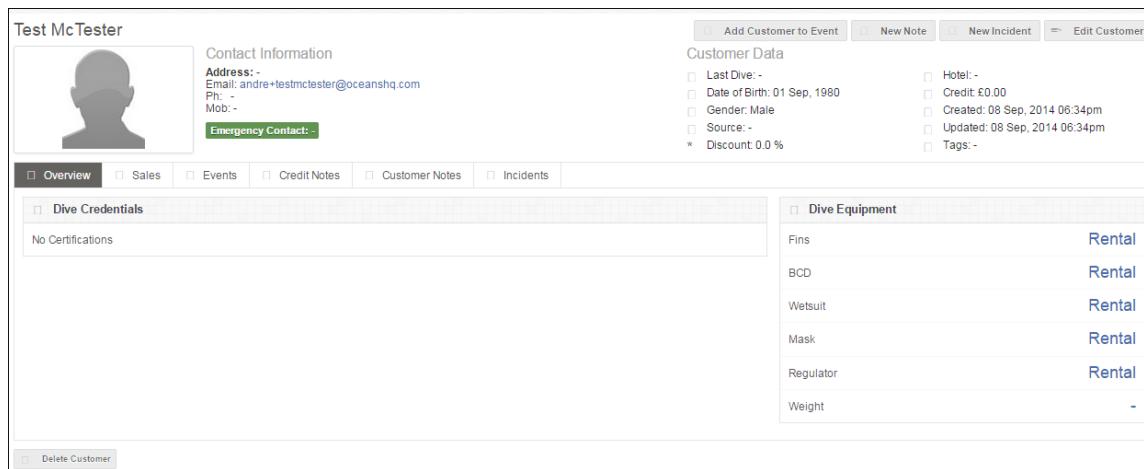


This screenshot shows the 'Add Customer to Event' modal window. It has a header 'Add Customer to Event' and a close button. The main area contains a dropdown menu labeled 'Select Event(s)' with the message 'Nothing selected'. Below the dropdown is a link 'Or Create New Event | Create New Course'. At the bottom are two buttons: 'Cancel' and a blue 'Add Customer to Event' button.

4. Select the event(s) from the **Select Event(s)** dropdown list.
5. Click **Add Customer to Event**.
6. If the required event/course is not available, click the [Create New Event](#) or [Create New Course](#) link to create.

### [Adding a New Note](#)

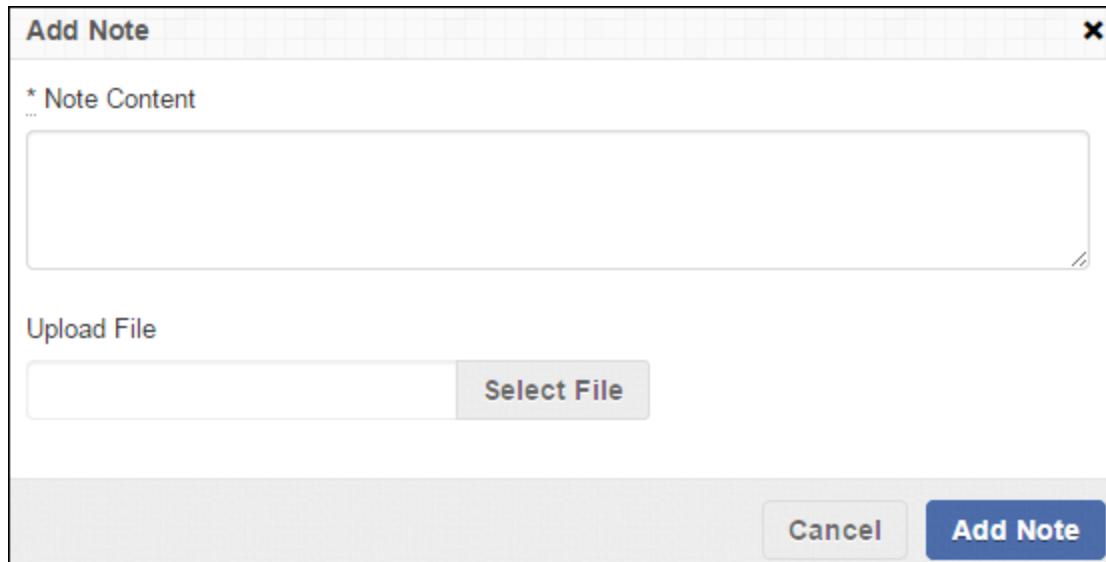
1. Go to **CRM > Customers**.
2. Click the name link of the customer to be modified. The following page is displayed.



The screenshot shows the DiveCentreHQ customer profile overview page for 'Test McTester'. The top navigation bar includes links for Add Customer to Event, New Note, New Incident, and Edit Customer. The main content area is divided into several sections:

- Contact Information:** Displays a placeholder profile picture, address (Email: andrew@testmctester@oceanshq.com), phone number, and mobile number.
- Emergency Contact:** Shows a placeholder contact entry.
- Customer Data:** Includes fields for Last Dive (01 Sep, 1980), Date of Birth (01 Sep, 1980), Gender (Male), Source (Discount: 0.0 %), Hotel (Credit: £0.00), Created (08 Sep, 2014 06:34pm), Updated (08 Sep, 2014 06:34pm), and Tags.
- Overview:** A tabbed section showing Dive Credentials (No Certifications) and Dive Equipment (Fins, BCD, Wetsuit, Mask, Regulator, Weight).
- Dive Equipment:** A table showing rental status for various items.
- Buttons:** Delete Customer and a small note about the last dive.

3. Click **Add Note**. The following popup window is displayed.

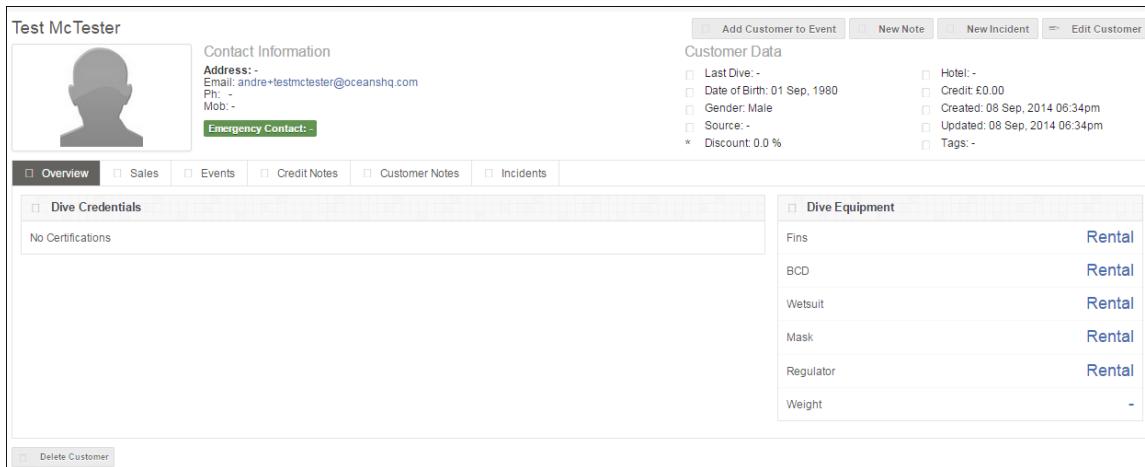


The screenshot shows the 'Add Note' modal window. It has a title bar 'Add Note' and a close button. The main area contains a text input field labeled '\* Note Content' with a placeholder '...'. Below it is a file upload section labeled 'Upload File' with a 'Select File' button. At the bottom right are 'Cancel' and 'Add Note' buttons.

4. Enter the notes for the customer in the **Note Content** field.  
 5. Click **Select File** to upload file.  
 6. Click **Add Note**.

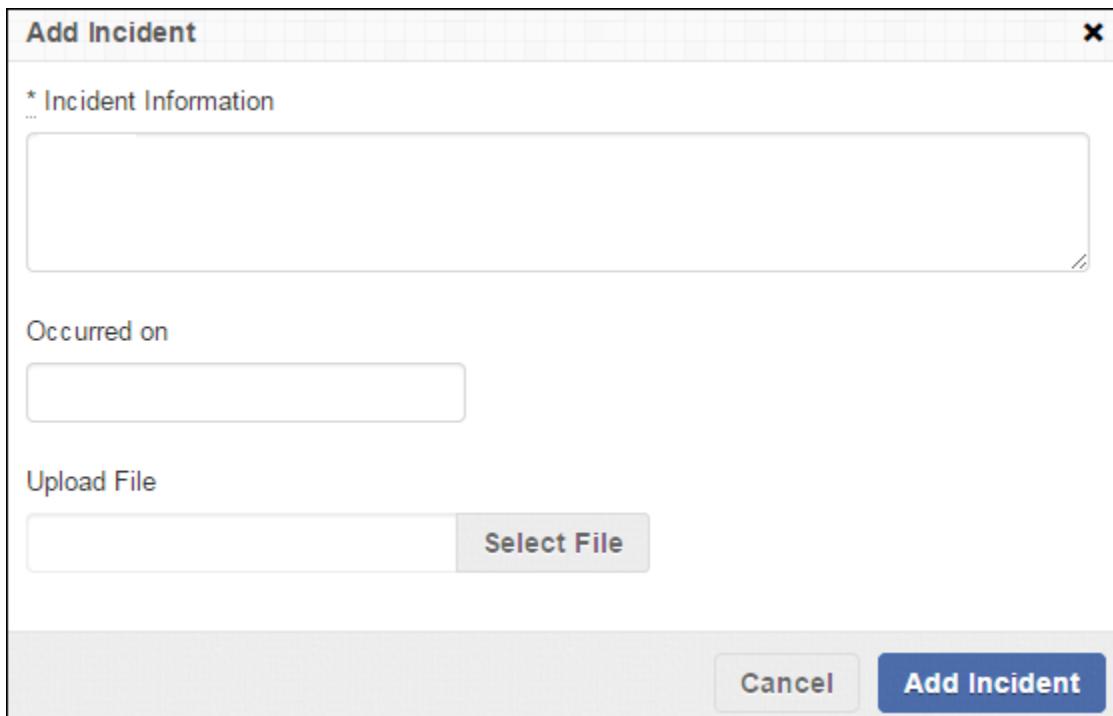
#### Adding Incident Information

1. Go to **CRM > Customers**.
2. Click the name link of the customer to be modified. The following page is displayed.



The screenshot shows a customer profile page for "Test McTester". The top navigation bar includes links for Add Customer to Event, New Note, New Incident, and Edit Customer. The main content area is divided into several sections: Contact Information (with a placeholder profile picture), Customer Data (listing Last Dive, Date of Birth, Gender, Source, Hotel, Credit, Created, Updated, and Tags), Dive Credentials (showing "No Certifications"), Dive Equipment (listing items like Fins, BCD, Wetsuit, Mask, Regulator, and Weight, all marked as Rental), and a footer with a Delete Customer link.

3. Click **New Incident**. The following popup window is displayed.



The screenshot shows the "Add Incident" popup window. It contains fields for Incident Information (a large text area), Occurred on (a date picker field), Upload File (a file input field with a "Select File" button), and a bottom row with "Cancel" and "Add Incident" buttons.

4. Enter the information about the incident in the **Incident Information** field.
5. Click the **Occurred on** field to select the date of occurrence from the calendar.
6. Click **Select File** to upload the file.
7. Click **Add Incident**.

#### [Deleting the Customer](#)

1. Go to **CRM > Customers**.
2. Click the name link of the customer to be modified. The following page is displayed.

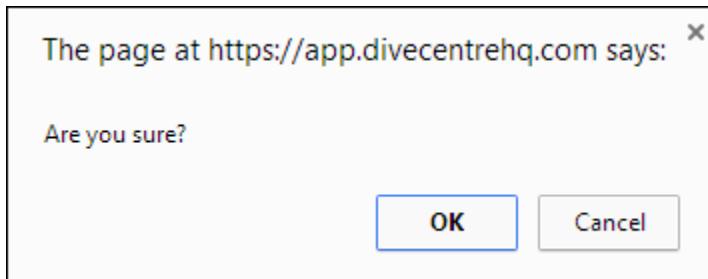
## User Manual

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Test McTester

 <p><b>Contact Information</b></p> <p><b>Address:</b> - Email: andre+testmctester@oceanshq.com Ph: - Mob: -</p> <p><b>Emergency Contact:</b> -</p>		<p>Add Customer to Event   New Note   New Incident   Edit Customer</p> <p><b>Customer Data</b></p> <p>Last Dive: -   Hotel: - Date of Birth: 01 Sep, 1980   Credit: £0.00 Gender: Male   Created: 08 Sep, 2014 06:34pm Source: -   Updated: 08 Sep, 2014 06:34pm * Discount: 0.0 %   Tags: -</p>												
<p>Overview   Sales   Events   Credit Notes   Customer Notes   Incidents</p> <p>Dive Credentials</p> <p>No Certifications</p>		<p>Dive Equipment</p> <table border="1"> <tr><td>Fins</td><td>Rental</td></tr> <tr><td>BCD</td><td>Rental</td></tr> <tr><td>Wetsuit</td><td>Rental</td></tr> <tr><td>Mask</td><td>Rental</td></tr> <tr><td>Regulator</td><td>Rental</td></tr> <tr><td>Weight</td><td>-</td></tr> </table>	Fins	Rental	BCD	Rental	Wetsuit	Rental	Mask	Rental	Regulator	Rental	Weight	-
Fins	Rental													
BCD	Rental													
Wetsuit	Rental													
Mask	Rental													
Regulator	Rental													
Weight	-													
<p><input type="button" value="Delete Customer"/></p>														

3. Click Delete Customer. The following popup window is displayed.



4. Click OK to delete.

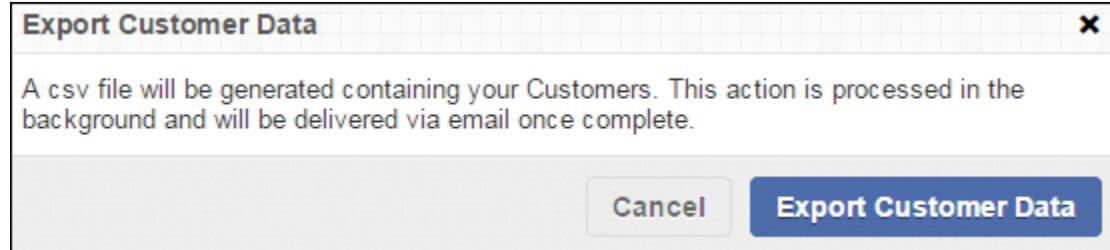
### Exporting Customer Records

1. Go to CRM > Customers. The following page is displayed.

Customers

Name	Phone	Email	Location	Certification	Tags	Sales
Test McTester		andre+testmctester@oceanshq.com				£0.00
Andre T		andre@oceanshq.com	test test test test 12 Aland Islands			£187.00
fdaf fdasgda						£0.00
Erez King	123-456-7890	andre+1@oceanshq.com	987 Hill Street - Palm Beach ACT 4221	SSI Try Scuba Diving #0 (2011-12-06)	Inst CE	£68.95
Lone Light	377495140949	ione.light@gmail.com	1599 Pennsylvania Ave Washington DC 98052 United States			£58.64
Walk In	000-000-0000	walkin@divecentrehq.com				£57,115.96
Adrian Higgins	634-213-3213	adrian@divecentrehq.com	432 Some Street Sydney New South Wales 2011	#986123 (2012-03-21)	Inst CE	£0.00
Josh Parker	124-567-8901	josh@demo.com	1/5 John Street - Karratha WA 6714	#0 (2012-03-04)	Inst CE	£25.00
Jacob Vercoe	543-231-3214	jacob@demo.com	12 Near Road - Coffs Harbour Jetty NSW 2450	#0 (2012-02-07)	Inst CE	£104.50
Matthew Cavalieri	832-324-0323	matthew@demo.com	9 Quirk Street - Sydney NSW 2003	PADI Rescue Diver #123456 (2012-02-07)	Inst CE	£0.00
Brett Miller	808-123-4567	brett@demo.com	65 Green Road - Manly NSW 2101	#0 (2012-02-07)	Inst CE	£0.00
Marcus Kapnoullas	818-321-4314	marcus@demo.com	81 Eve Terrace - Frankston Heights VIC 3199	#0 (2012-01-14)	Inst CE	£0.00
Paul Kyriakouli	302-321-4314	paul@demo.com	123 Esplanade - Mornington VIC 3931	#0 (2012-01-14)	Inst CE	£0.00
Jon Kouyias	301-431-4315	jon@demo.com	1 Wilshire Street - Richmond VIC 3121	#123457 (2012-01-14)	Inst CE	£110.00
Peter Kearney	453-431-4315	peter@demo.com	43 Garfield Tce - Surfers Paradise QLD 4217	#0 (2012-03-15)	Inst CE	£0.00
Mark Byrne	728-392-8291	mark@demo.com	515 Marine Parade - Gold Coast QLD 4220	#0 (2012-03-16)	Inst CE	£0.00
John Bott	711-193-1934	john@demo.com	60 Moorooka Road - Brisbane QLD 4105	#0 (2012-03-17)	Inst CE	£0.00
Ben Mattes	829-193-1934	ben@demo.com	91 Alfred Road - Mermaid Beach QLD 4218	#123458 (2012-03-18)	Inst CE	£0.00
Gavin Clarke	980-921-2134	gavin@demo.com	431 Cambridge Tce - Surfers Paradise QLD 4217	#0 (2012-03-19)	Inst CE	£0.00

2. Click Export Customer Records. The following popup window displayed.



3. Click **Export Customer Data**. This exports the data and an email is sent to the user.

### Synching to MailChimp

1. Go to **CRM > Customers**. The following page is displayed.

Customers						
Customer Records				Sync to MailChimp	Export Customer Records	New Customer
Name	Phone	Email	Location	Certification	Tags	Sales
Test McTester		andre+testmctester@oceanshq.com			£0.00	
Andre T		andre@oceanshq.com	test test test 12 Aland Islands		£187.00	
fdaf fdasgda					£0.00	
Erez King	123-456-7890	erez+1@oceanshq.com	987 Hill Street - Palm Beach ACT 4221	SSI Try Scuba Diving #0 (2011-12-06)	Inst CE	-£68.95
Lone Light	377495140949	lone.light@gmail.com	1599 Pennsylvania Ave Washington DC 98052 United States			£58.64
Walk In	000-000-0000	walkin@divecentrehq.com				£57,115.96
Adrian Higgins	634-213-3213	adrian@divecentrehq.com	432 Some Street Sydney New South Wales 2011	#986123 (2012-03-21)	Inst CE	£0.00
Josh Parker	124-567-8901	josh@demo.com	1/5 John Street - Karratha WA 6714	#0 (2012-03-04)	Inst CE	£25.00
Jacob Vercoe	543-231-3214	jacob@demo.com	12 Near Road - Coffs Harbour Jetty NSW 2450	#0 (2012-02-07)	Inst CE	£104.50
Matthew Cavalieri	832-324-0323	matthew@demo.com	9 Quirk Street - Sydney NSW 2093	PADI Rescue Diver #123456 (2012-02-07)	Inst CE	£0.00
Brett Miller	808-123-4567	brett@demo.com	65 Green Road - Manly NSW 2101	#0 (2012-02-07)	Inst CE	£0.00
Marcus Kapnoullas	818-321-4314	marcus@demo.com	81 Eve Terrace - Frankston Heights VIC 3199	#0 (2012-01-14)	Inst CE	£0.00
Paul Kyriakoullas	302-321-4314	paul@demo.com	123 Esplanade - Mornington VIC 3931	#0 (2012-01-14)	Inst CE	£0.00
Jon Kouyias	301-431-4315	jon@demo.com	1 Wilshire Street - Richmond VIC 3121	#123457 (2012-01-14)	Inst CE	£110.00
Peter Kearney	453-431-4315	peter@demo.com	43 Garfield Tce - Surfers Paradise QLD 4217	#0 (2012-03-15)	Inst CE	£0.00
Mark Byrne	728-392-8291	mark@demo.com	515 Marine Parade - Gold Coast QLD 4220	#0 (2012-03-16)	Inst CE	£0.00
John Bott	711-193-1934	john@demo.com	60 Moorooka Road - Brisbane QLD 4105	#0 (2012-03-17)	Inst CE	£0.00
Ben Mattes	829-193-1934	ben@demo.com	91 Alfred Road - Mermaid Beach QLD 4218	#123458 (2012-03-18)	Inst CE	£0.00
Gavin Clarke	980-921-2134	gavin@demo.com	431 Cambridge Tce - Surfers Paradise QLD 4217	#0 (2012-03-19)	Inst CE	£0.00

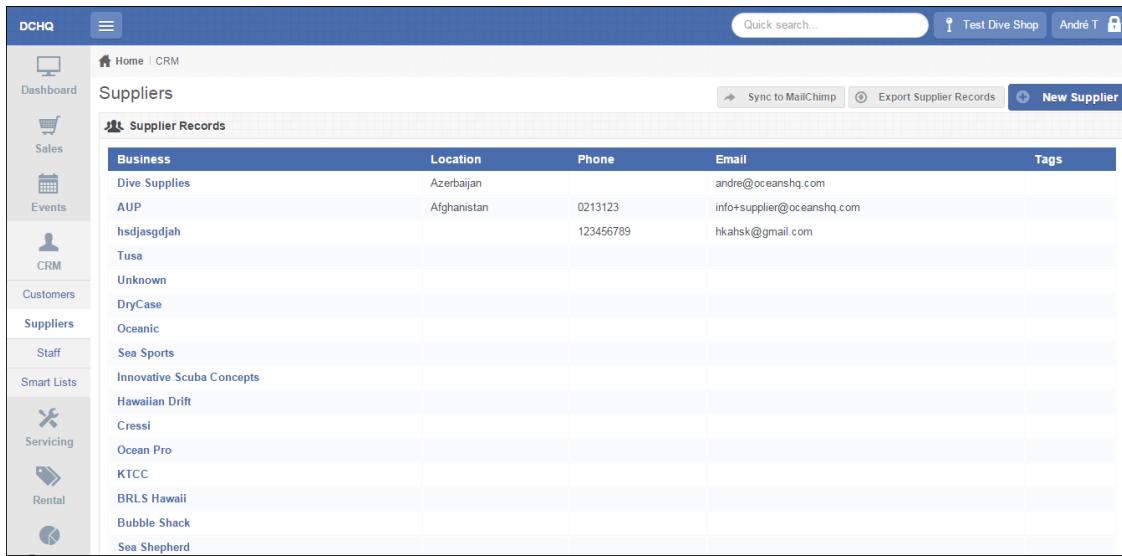
2. Click **Sync to MailChimp**.

### Suppliers

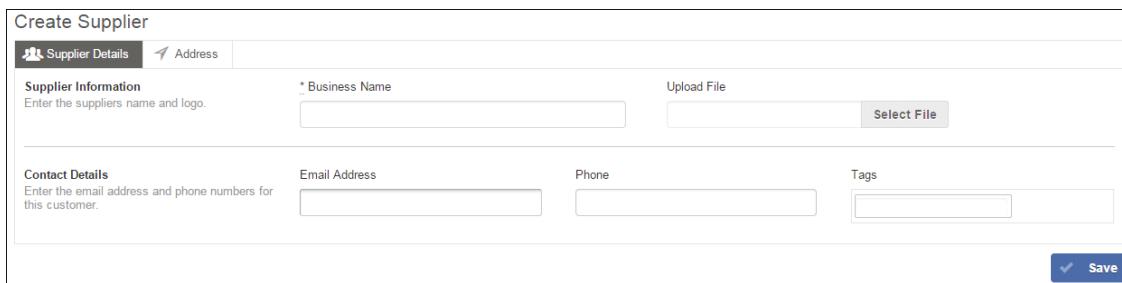
This option enables you to add new suppliers as well as modify details of the existing suppliers.

### Adding a New Supplier

1. Go to **CRM > Suppliers**. The following page is displayed.



2. Click **New Supplier**. The following page is displayed.



### 3. Supplier Details

- **Supplier Information**
  - i. Enter the name of the business in the **Business Name** field.
  - ii. Click **Select File** from the **Upload File** field to upload a file.
- **Contact Details**
  - i. Enter the email address of the supplier in the **Email Address** field.
  - ii. Enter the phone number of the supplier in the **Phone** field.
  - iii. Enter tags related to the supplier in the **Tags** field.

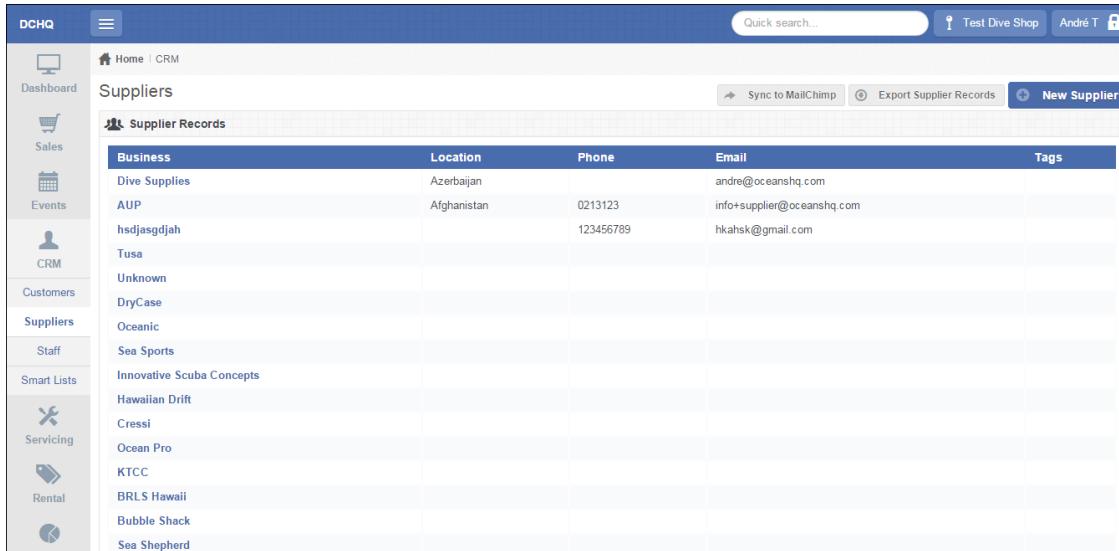
### 4. Address

- **Address Details**
  - i. Enter the address of the customer in the **Address 1 / Address 2** fields.
  - ii. Enter the city of residence in the **City** field.
  - iii. Enter the state in the **State** field.
  - iv. Select the country from the **Country** dropdown list.
  - v. Enter the postal code in the **Post Code** field.

5. Click **Save**. This creates the supplier.

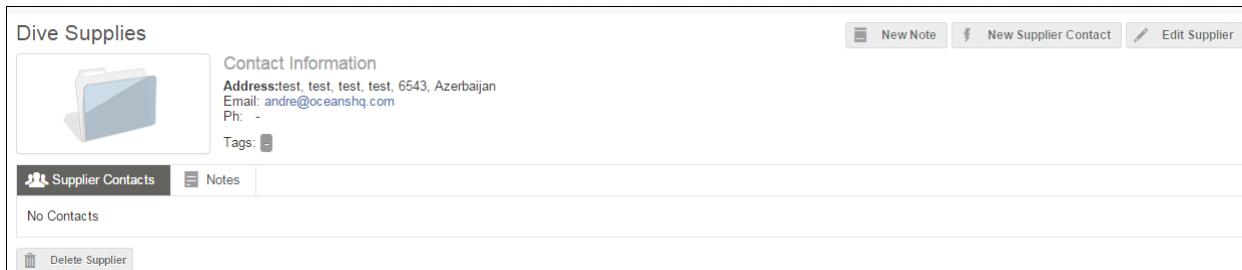
## Modifying the Supplier Details

1. Go to **CRM > Suppliers**. The following page is displayed.



Business	Location	Phone	Email	Tags
Dive Supplies	Azerbaijan		andre@oceanshq.com	
AUP	Afghanistan	0213123	info+supplier@oceanshq.com	
hsdjasgdjah		123456789	hkahsk@gmail.com	
Tusa				
Unknown				
DryCase				
Oceanic				
Sea Sports				
Innovative Scuba Concepts				
Hawaiian Drift				
Cressi				
Ocean Pro				
KTCC				
BRLS Hawaii				
Bubble Shack				
Sea Shepherd				

2. Click the required business name link from the **Business** column. The following page is displayed.



**Dive Supplies**

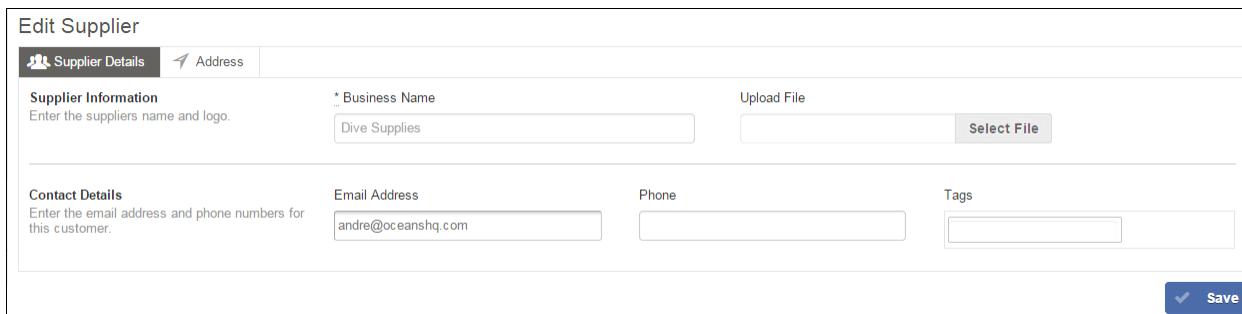
Contact Information  
Address: test, test, test, test, 6543, Azerbaijan  
Email: andre@oceanshq.com  
Ph: -  
Tags: [ ]

**Supplier Contacts** [ ] **Notes** [ ]

No Contacts

**Delete Supplier**

3. Click **Edit Supplier**. The following page is displayed.



**Edit Supplier**

**Supplier Details** [ ] **Address** [ ]

**Supplier Information**  
Enter the suppliers name and logo.  
\* Business Name: Dive Supplies  
Upload File [ ] Select File [ ]

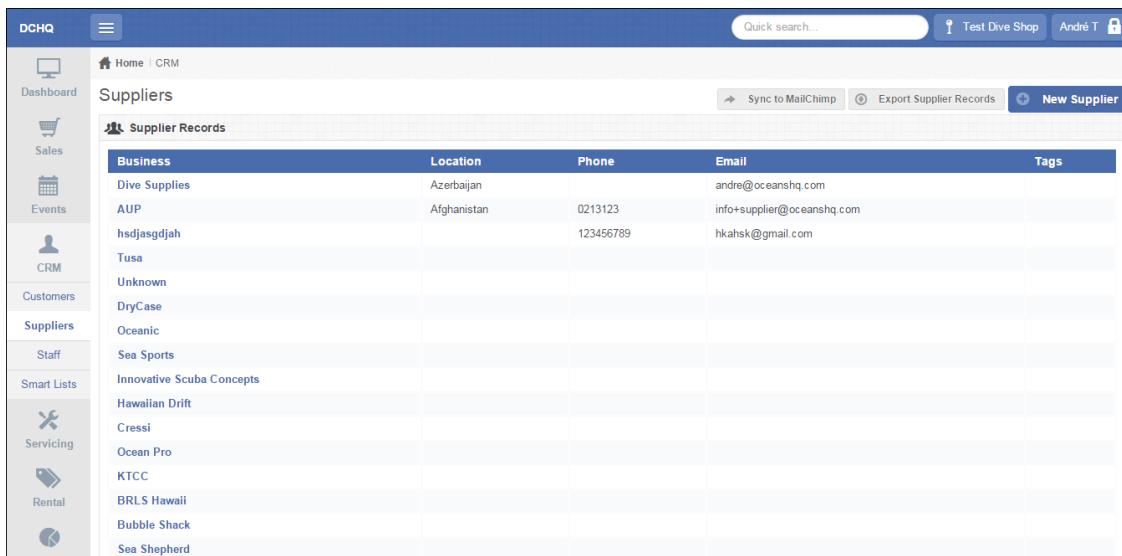
**Contact Details**  
Enter the email address and phone numbers for this customer.  
Email Address: andre@oceanshq.com  
Phone: [ ] Tags: [ ]

**Save** [ ]

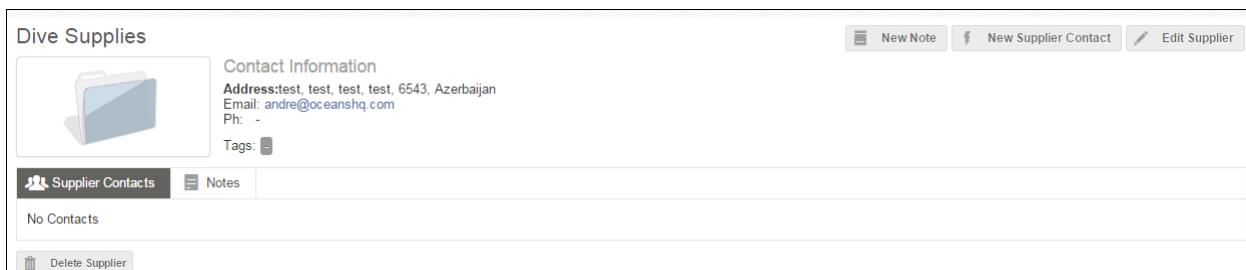
4. Modify the required details and click **Save**.

## Deleting the Supplier

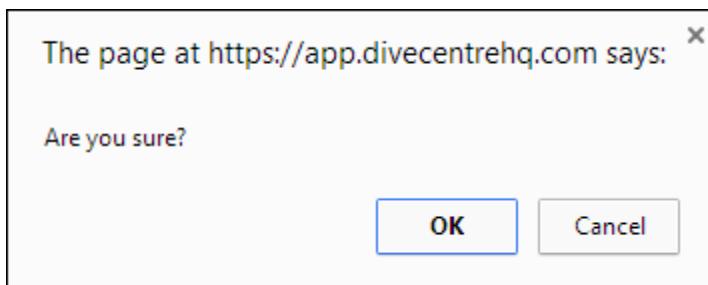
1. Go to **CRM > Suppliers**. The following page is displayed.



2. Click the required business name link from the **Business** column. The following page is displayed.



3. Click **Delete Supplier**. The following popup window is displayed.



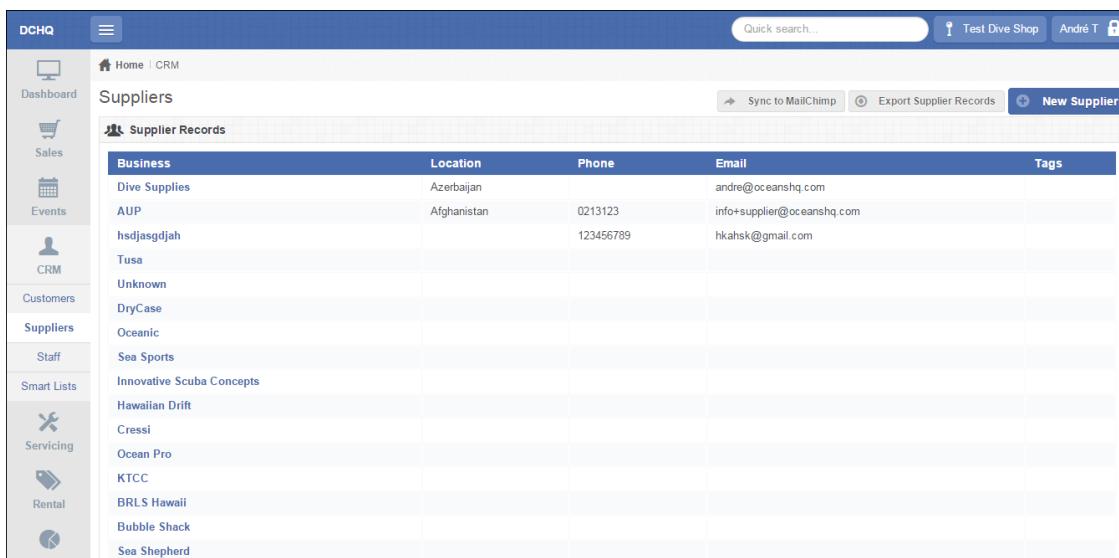
4. Click **OK** to delete.

### Adding a Note

1. Go to **CRM > Suppliers**. The following page is displayed.

## User Manual

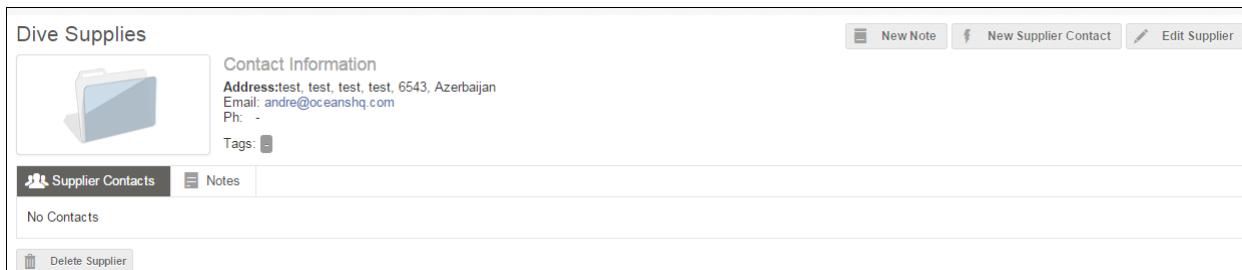
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The screenshot shows the DiveCentreHQ interface. On the left is a sidebar with various menu items: Dashboard, Sales, Events, CRM, Customers, Suppliers (which is selected), Staff, Smart Lists, Servicing, Rental, and a gear icon. The main content area is titled 'Suppliers' and contains a table with the following data:

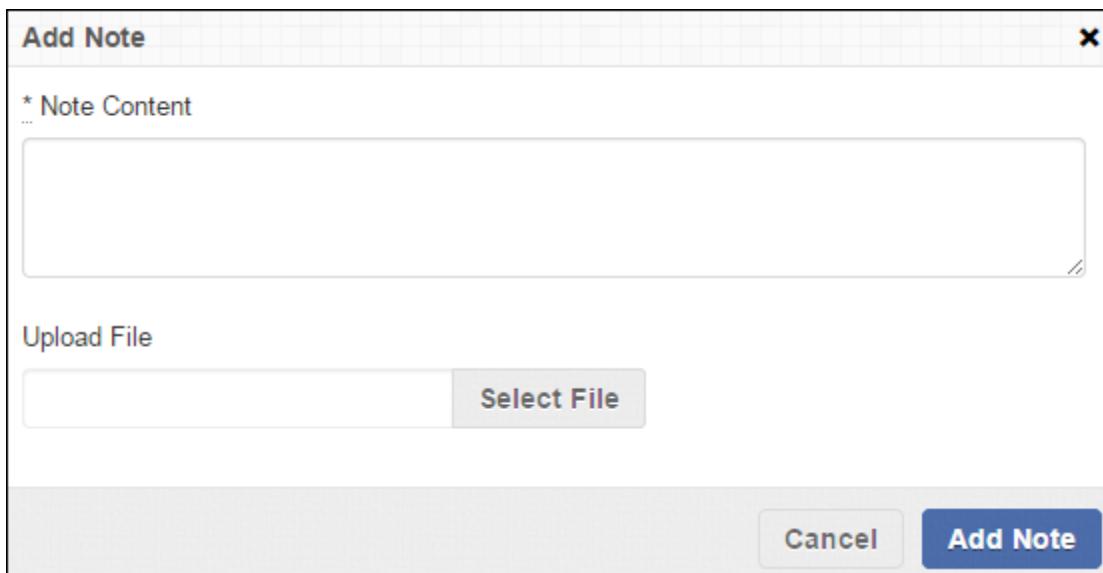
Business	Location	Phone	Email	Tags
Dive Supplies	Azerbaijan		andre@oceanshq.com	
AUP	Afghanistan	0213123	info+supplier@oceanshq.com	
hsdjsgdjh		123456789	hkahsk@gmail.com	
Tusa				
Unknown				
DryCase				
Oceanic				
Sea Sports				
Innovative Scuba Concepts				
Hawaiian Drift				
Cressi				
Ocean Pro				
KTCC				
BRLS Hawaii				
Bubble Shack				
Sea Shepherd				

- Click the required supplier name link from the **Business** column. The following page is displayed.



This screenshot shows the 'Dive Supplies' supplier details page. At the top, there's a 'Contact Information' section with the address: 'test, test, test, test, 6543, Azerbaijan', email: 'andre@oceanshq.com', and phone: '-'. Below this is a 'Tags:' field with a dropdown menu. At the bottom, there are tabs for 'Supplier Contacts' (which is selected) and 'Notes'. A message says 'No Contacts'. At the very bottom is a 'Delete Supplier' button.

- Click **New Note**. The following popup window is displayed.



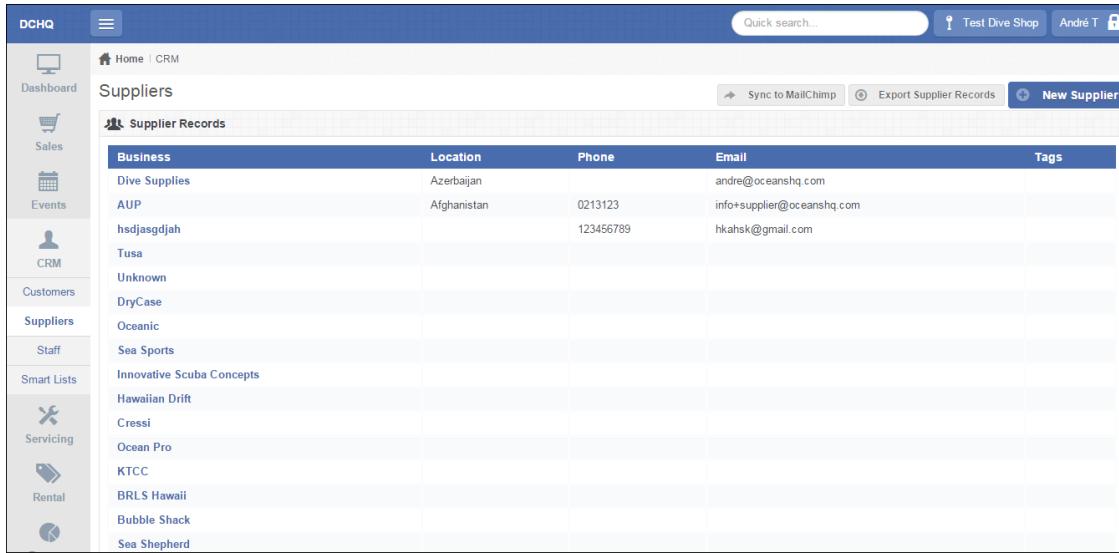
This screenshot shows the 'Add Note' popup window. It has a title bar with a close button. Inside, there's a 'Note Content' field with a placeholder '...'. Below it is an 'Upload File' section with a 'Select File' button. At the bottom right are 'Cancel' and 'Add Note' buttons.

- Enter the note in the **Note Content** field.
  - Click **Select File** to upload a file.
-

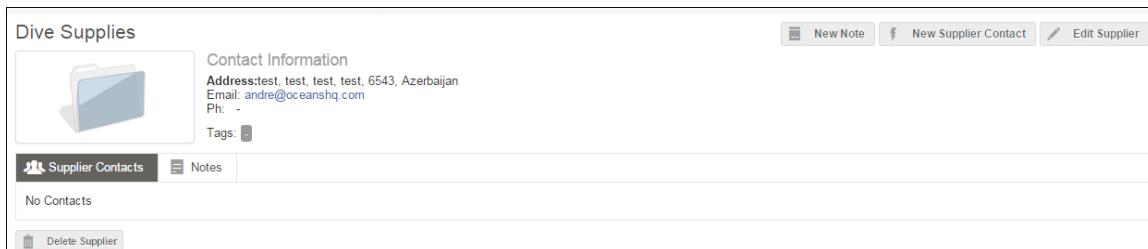
**6. Click Add Note.**

### Modifying the Note

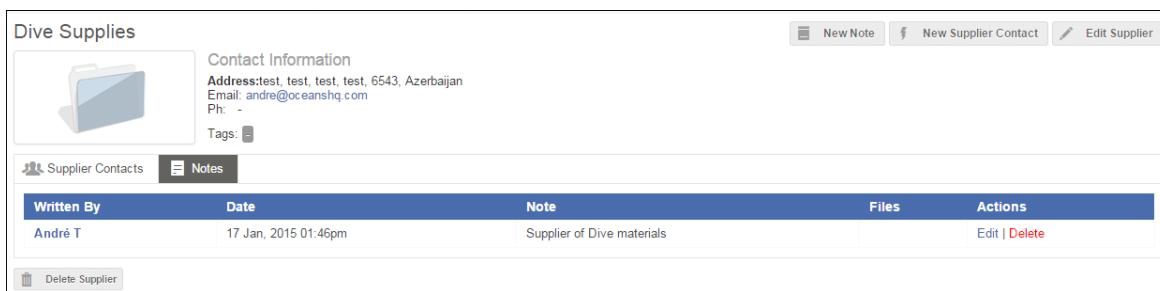
1. Go to **CRM > Suppliers**. The following page is displayed.



2. Click the required business name link from the **Business** column. The following page is displayed.



3. Click **Notes** tab. The following page is displayed.



4. Click **Edit** corresponding to the notes to be modified. The following page is displayed.

**Dive Supplies**

Contact Information  
Address: test, test, test, test, 6543, Azerbaijan  
Email: andre@oceanshq.com  
Ph: -  
Tags:

**Supplier Contacts** **Notes**

Written By	Date	Note	Files	Actions
André T	17 Jan, 2015 01:46pm	Supplier of Dive materials		Edit   Delete

Delete Supplier

5. Modify the notes and click outside the field to save.

### Deleting the Notes

1. Go to **CRM > Suppliers**. The following page is displayed.

**DCHQ**

**Home | CRM**

**Suppliers**

**Supplier Records**

Business	Location	Phone	Email	Tags
Dive Supplies	Azerbaijan		andre@oceanshq.com	
AUP	Afghanistan	0213123	info+supplier@oceanshq.com	
hsdjasgdjah		123456789	hkahsk@gmail.com	
Tusa				
Unknown				
DryCase				
Oceanic				
Sea Sports				
Innovative Scuba Concepts				
Hawaiian Drift				
Cressi				
Ocean Pro				
KTCC				
BRLS Hawaii				
Bubble Shack				
Sea Shepherd				

2. Click the required business name link from the **Business** column. The following page is displayed.

**Dive Supplies**

Contact Information  
Address: test, test, test, test, 6543, Azerbaijan  
Email: andre@oceanshq.com  
Ph: -  
Tags:

**Supplier Contacts** **Notes**

No Contacts

Delete Supplier

3. Click **Notes** tab. The following page is displayed.



**Dive Supplies**

Contact Information

Address: test test test test, 6543, Azerbaijan  
Email: andre@oceanshq.com  
Ph: -

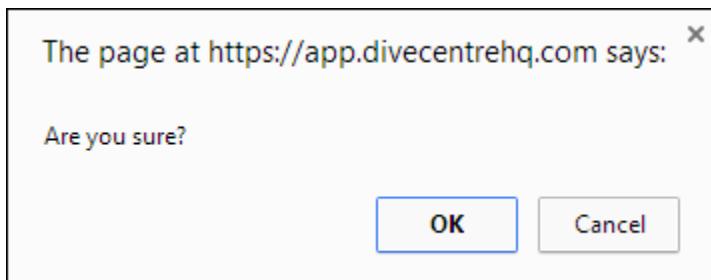
Tags:

**Supplier Contacts** **Notes**

Written By	Date	Note	Files	Actions
André T	17 Jan, 2015 01:46pm	Supplier of Dive materials		<a href="#">Edit</a>   <a href="#">Delete</a>

[Delete Supplier](#)

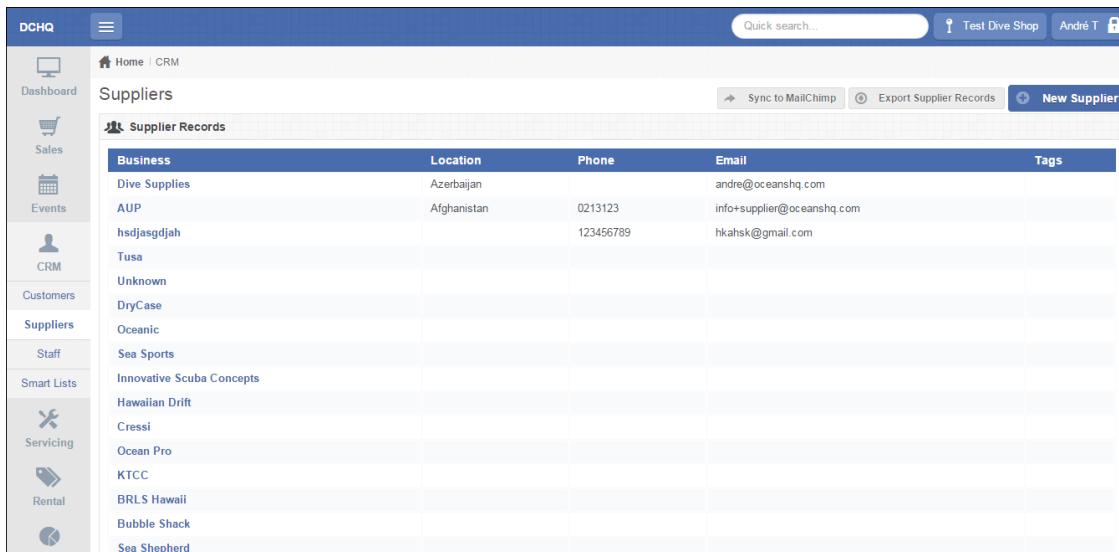
4. Click **Delete** corresponding to the notes to be deleted. The following popup window is displayed.



5. Click **OK** to delete.

## Adding New Supplier Contact

1. Go to **CRM > Suppliers**. The following page is displayed.



**Suppliers**

**Supplier Records**

Business	Location	Phone	Email	Tags
Dive Supplies	Azerbaijan		andre@oceanshq.com	
AUP	Afghanistan	0213123	info+supplier@oceanshq.com	
hsdjasgdjah		123456789	hkahsk@gmail.com	
Tusa				
Unknown				
DryCase				
Oceanic				
Sea Sports				
Innovative Scuba Concepts				
Hawaiian Drift				
Cressi				
Ocean Pro				
KTCC				
BRLS Hawaii				
Bubble Shack				
Sea Shepherd				

2. Click the required business name link from the **Business** column. The following page is displayed.

Dive Supplies

Contact Information	
	Address: test, test, test, test, 6543, Azerbaijan Email: andre@oceanshq.com Ph: -
Tags:	<input type="text"/>
<input checked="" type="button"/> Supplier Contacts <input type="button"/> Notes	
No Contacts	
<input type="button"/> Delete Supplier	

3. Click **New Supplier Contact**. The following page is displayed.

Create Supplier Contact

Individual Details			
Individual's Information Enter the individual's name.	* First Name <input type="text"/>	* Last Name <input type="text"/>	
Contact Details Enter the email address and phone numbers for this customer.	Email <input type="text"/>	Phone <input type="text"/>	Position <input type="text"/>
Tags & Photo Enter tags for this individual and upload their photo.	Tags <input type="text"/>	Upload File <input type="file"/>	<input type="button"/> Select File
<input checked="" type="button"/> Save			

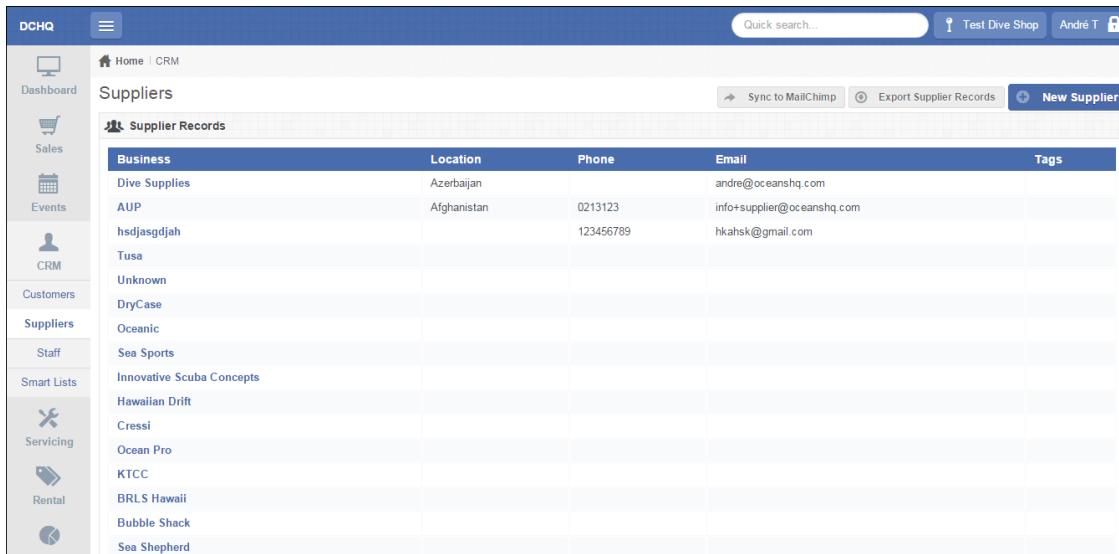
#### 4. Individual Details

- Individual's Information
  - i. Enter the first name of the supplier in the First Name field.
  - ii. Enter the last name of the supplier in the Last Name field.
- Contact Details
  - i. Enter the email address of the supplier in the Email field.
  - ii. Enter the phone number of the supplier in the Phone field.
  - iii. Enter the position in the Position field.
- Tags and Photo
  - i. Enter the tags in the Tag field.
  - ii. Click **Select File** to upload a file.

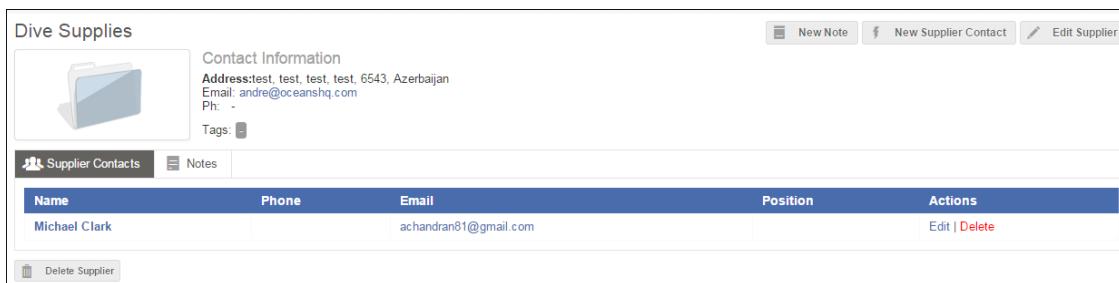
#### 5. Click **Save**.

#### Modifying the Supplier Contact Details

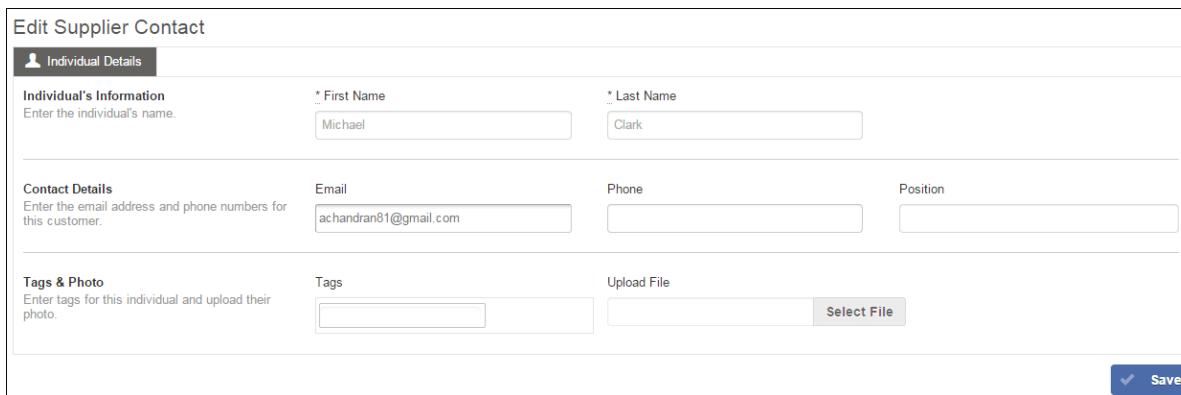
1. Go to **CRM > Suppliers**. The following page is displayed.



2. Click the required business name link from the **Business** column. The following page is displayed.



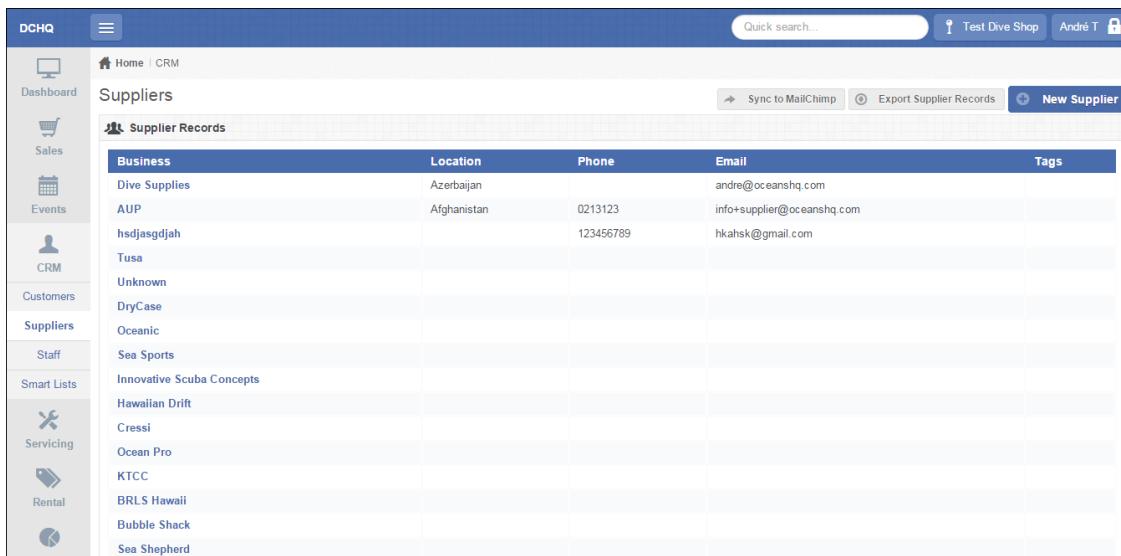
3. Click Edit corresponding to the name of the supplier to be modified. The following page is displayed.



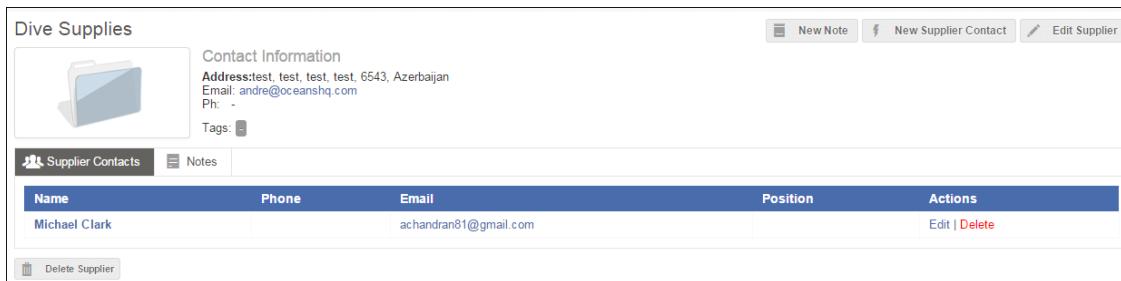
4. Modify the required details and click **Save**.

### Deleting the Supplier Contact Details

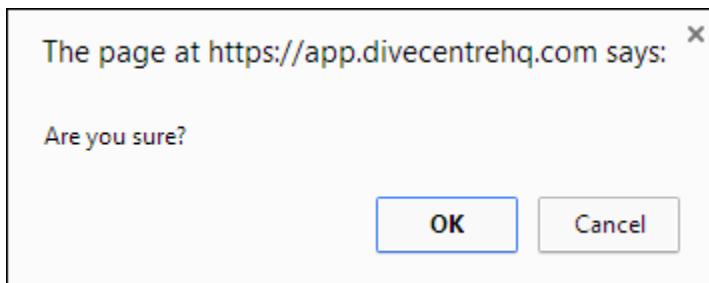
1. Go to **CRM > Suppliers**. The following page is displayed.



2. Click the required business name link from the **Business** column. The following page is displayed.



3. Click Delete. The following popup window is displayed.



4. Click **OK** to delete the supplier contact.

## Staff

This option enables you to add new staff members as well as modify details of the existing staff members.

### Adding New Staff Member

1. Go to **CRM > Staff**. The following page is displayed.

Staff				
<a href="#">Staff Record</a>		<a href="#">Sync to MailChimp</a>		<a href="#">Export Staff Records</a>
Name	Phone	Email	Tags	Product Sales
André T	02-4567-8901	demo+1@divecentrehq.com	MSDT	£59,603.01
Vitaliy S	123467579	vitaliy@oceanshq.com		£0.00
Melissa G		melissa@divecentrehq.com	Instructor	£0.00
Roberto Raffaeli		roberto@raffaeli.cc		£1,016.50
Total staff: 4				

2. Click **New Staff Member**. The following page is displayed.

### Create Staff Member

User Details	Address	User Access & Availability	
<b>User Information</b> Enter the user's name. <input type="text"/>	* First Name <input type="text"/>	* Last Name <input type="text"/>	
		Monthly Sales Target <input type="text"/> <input checked="" type="checkbox"/> Show target on dashboard	
	Password <input type="password"/>	Confirm Password <input type="password"/>	
		Locale <input type="button" value="English"/>	
<b>Contact Details</b> Enter the email address and phone numbers for this user.	Email Address <input type="text"/>	Alternative Email Address <input type="text"/>	Phone <input type="text"/>
<b>Emergency Contact &amp; Photo</b> Enter emergency contact details and upload a photo.	Emergency Contact Details <input type="text"/>	Tags <input type="text"/>	
	Upload File <input type="file"/>	<input type="button" value="Select File"/>	
			<input checked="" type="checkbox"/> Save

### 3. User Details

- **User Information**
  - i. Enter the first name of the staff in the **First Name** field.
  - ii. Enter the last name of the staff in the **Last Name** field.
  - iii. Enter the monthly sales target in the **Monthly Sales Target** field.

**Note:** If you want to display the monthly sales target in the dashboard, select the **Show target on dashboard** checkbox.

  - iv. Enter the authentication password in the **Password** field.
  - v. Re-enter the password in the **Confirm Password** field.
  - vi. Select the language from the **Locale** dropdown list.
- **Contact Details**
  - i. Enter the email address of the staff in the **Email Address** field.
  - ii. Enter the alternative email address of the staff in the **Alternative Email Address** field.
  - iii. Enter the contact number of the staff in the **Phone** field.
- **Emergency Contact & Photo**
  - i. Enter the emergency contact details in the **Emergency Contact Details** field.

- ii. Enter the tags in the **Tags** field.
  - iii. Click **Select File** to upload the photo of the staff member.
4. Address
- Address Details
    - i. Enter the address of the staff member in the **Address 1/ Address 2** field.
    - ii. Enter the city in the **City** field.
    - iii. Enter the state in the **State** field.
    - iv. Select the country of residence in the **Country** field.
    - v. Enter the zip code of the area in the **Post Code** field.
5. User Access & Availability
- User Access
    - i. Select the access level of the user from the **User Level** dropdown list.
    - ii. Select the checkbox corresponding to the required shop from the **Shop Access** section.
  - Work Availability
    - i. Select the checkbox corresponding to the required days to indicate the availability for work.
    - ii. Enter the contracted hours in the **Contracted Hours** field.
  - Next Holiday
    - i. Click the **Start Date** field to select the holiday date of the staff from the calendar.
    - ii. Click the **End Date** field select the return to work date of the staff from the calendar.
6. Click **Save**.

### Modifying the Staff Details

1. Go to **CRM > Staff**. The following page is displayed.

Staff				
<a href="#">Sync to MailChimp</a> <a href="#">Export Staff Records</a> <a href="#">New Staff Member</a>				
 Staff Record				
Name	Phone	Email	Tags	Product Sales
André T	02-4567-8901	demo+1@divecentrehq.com	MSDT	£59,603.01
Vitaliy S	123467579	vitaliy@oceanshq.com		£0.00
Melissa G		melissa@divecentrehq.com	Instructor	£0.00
Roberto Raffaeli		roberto@raffaeli.cc		£1,016.50
Total staff: 4				

2. Click the name link of the required staff member to be modified. The following page is displayed.

## User Manual

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**Roberto Raffaeli**



**Contact Information**

Address: -  
Email: roberto@raffaelli.cc  
Ph: -

**Emergency Contact:** -

Tags

New Note
Edit Staff Member

**Working Details**

User Level: manager  
Shop Access: Test Dive Shop, Test Dive Shop  
Availability: Mon, Tue, Wed, Thu, Fri, Sat, Sun  
Contracted Hours: -  
Monthly Sales Target: £1,500.00

Order ID	Date	Products	Total	To Pay	Status
8911	16 Jun, 2014 09:18pm	10 x Liquid Skin Mask [Yellow] (£95.00)	£1,016.50	£16.50	<span style="background-color: #2e6b2e; color: white; padding: 2px 5px;">Complete</span>

3. Click **Edit Staff Member**. The following page is displayed.

Edit Staff Member

**User Information**  
Enter the user's name.

\* First Name

\* Last Name

Monthly Sales Target

Show target on dashboard

Password

Confirm Password

Locale

**Contact Details**  
Enter the email address and phone numbers for this user.

Email Address

Alternative Email Address

Phone

**Emergency Contact & Photo**  
Enter emergency contact details and upload a photo.

Emergency Contact Details

Tags

Upload File  Select File

4. Modify the required details and click **Save**.

### Deleting the Staff Member

1. Go to **CRM > Staff**. The following page is displayed.

Staff

Name	Phone	Email	Tags	Product Sales
André T	02-4567-8901	demo+1@divecentrehq.com	MSDT	£59,603.01
Vitaliy S	123467579	vitaliy@oceanhq.com		£0.00
Melissa G		melissa@divecentrehq.com	Instructor	£0.00
Roberto Raffaeli		roberto@raffaelli.cc		£1,016.50

Total staff: 4

2. Click the name link of the required staff member to be modified. The following page is displayed.

**Roberto Raffaeli**



**Contact Information**

Address: -  
Email: roberto@raffaelli.cc  
Ph: -

**Emergency Contact:** -

Tags 

New Note
Edit Staff Member

**Working Details**

User Level: manager

Shop Access: Test Dive Shop, Test Dive Shop

Availability: Mon, Tue, Wed, Thu, Fri, Sat, Sun

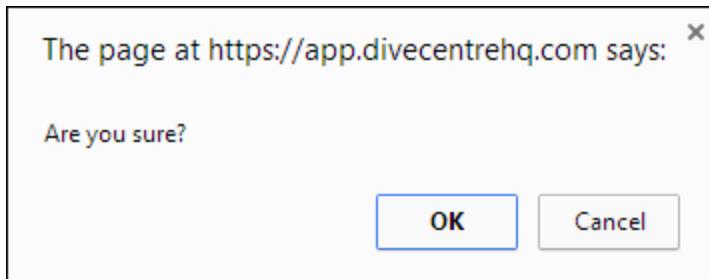
Contracted Hours: -

Monthly Sales Target: £1,500.00

Sales	Notes				
Order ID	Date	Products	Total	To Pay	Status
8911	16 Jun, 2014 09:18pm	10 x Liquid Skin Mask [Yellow] (£95.00)	£1,016.50	£16.50	<span style="background-color: #0070C0; color: white; padding: 2px;">Complete</span>

 Delete Staff Member

3. Click **Delete Staff Member**. The following popup window is displayed.



4. Click **OK** to delete.

### Adding a Note

1. Go to **CRM > Staff**. The following page is displayed.

Staff
 Sync to MailChimp
 Export Staff Records
 New Staff Member

**Staff Record**

Name	Phone	Email	Tags	Product Sales
André T	02-4567-8901	demo+1@divecentrehq.com	MSDT	£59,603.01
Vitaliy S	123467579	vitaliy@oceanshq.com		£0.00
Melissa G		melissa@divecentrehq.com	Instructor	£0.00
Roberto Raffaeli		roberto@raffaelli.cc		£1,016.50

Total staff: 4

2. Click the name link of the required staff member to be modified. The following page is displayed.



**Contact Information**

Address: -  
Email: roberto@raffaelli.cc  
Ph: -

**Emergency Contact:** -

**Tags:** [empty]

**Working Details**

User Level: manager

Shop Access: Test Dive Shop, Test Dive Shop

Availability: Mon, Tue, Wed, Thu, Fri, Sat, Sun

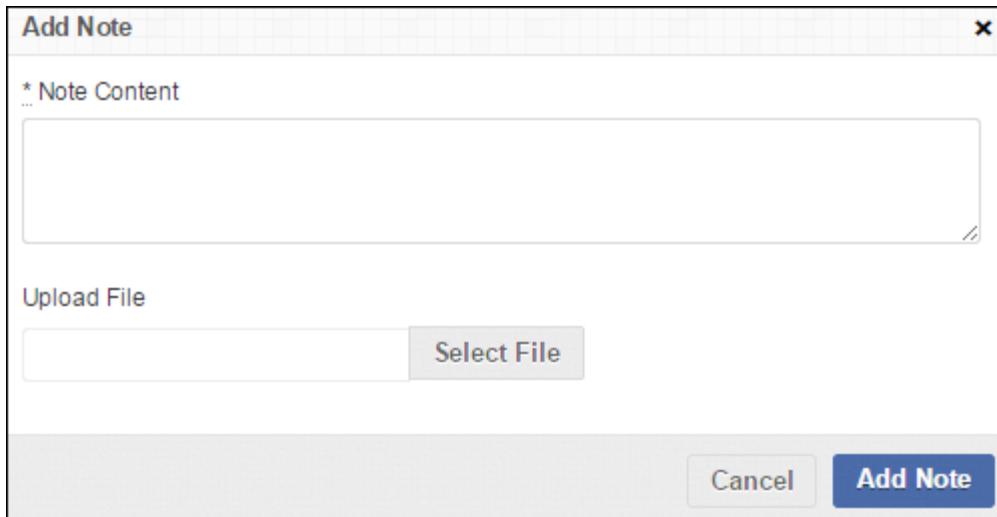
Contracted Hours: -

Monthly Sales Target: £1,500.00

Sales	Notes				
Order ID	Date	Products	Total	To Pay	Status
8911	16 Jun, 2014 09:18pm	10 x Liquid Skin Mask [Yellow] (£95.00)	£1,016.50	£16.50	Complete

[Delete Staff Member](#)

3. Click **New Note**. The following page is displayed.



**Add Note**

\* Note Content  
...

Upload File

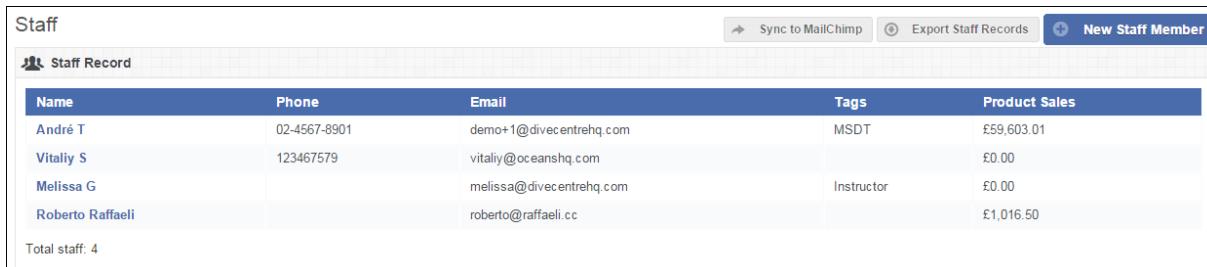
Select File

Cancel Add Note

4. Enter the note in the **Note Content** field.  
 5. Click **Select File** to upload a file.  
 6. Click **Add Note**.

### Modifying the Note

1. Go to CRM > Staff. The following page is displayed.



**Staff**

[Sync to MailChimp](#) [Export Staff Records](#) [New Staff Member](#)

Name	Phone	Email	Tags	Product Sales
André T	02-4567-8901	demo+1@divecentrehq.com	MSDT	£59,603.01
Vitaliy S	123467579	vitaliy@oceanhq.com		£0.00
Melissa G		melissa@divecentrehq.com	Instructor	£0.00
Roberto Raffaeli		roberto@raffaelli.cc		£1,016.50

Total staff: 4

2. Click the name link of the required staff member to be modified. The following page is displayed.

## User Manual

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Roberto Raffaeli

 <p>Contact Information Address: - Email: roberto@raffaelli.cc Ph: - <b>Emergency Contact:</b> - Tags <input type="button" value=""/></p>	<p><b>New Note</b> <b>Edit Staff Member</b></p> <p><b>Working Details</b></p> <p>User Level: manager</p> <p>Shop Access: Test Dive Shop, Test Dive Shop</p> <p>Availability: Mon, Tue, Wed, Thu, Fri, Sat, Sun</p> <p>Contracted Hours: -</p> <p>Monthly Sales Target: £1,500.00</p>				
<input checked="" type="radio"/> Sales <input type="radio"/> Notes					
Order ID	Date	Products	Total	To Pay	Status
8911	16 Jun, 2014 09:18pm	10 x Liquid Skin Mask [Yellow] (£95.00)	£1,016.50	£16.50	<b>Complete</b>
<input type="button" value="Delete Staff Member"/>					

3. Click **Notes** tab. The following page is displayed.

Roberto Raffaeli

 <p>Contact Information Address: - Email: roberto@raffaelli.cc Ph: - <b>Emergency Contact:</b> - Tags <input type="button" value=""/></p>	<p><b>New Note</b> <b>Edit Staff Member</b></p> <p><b>Working Details</b></p> <p>User Level: manager</p> <p>Shop Access: Test Dive Shop, Test Dive Shop</p> <p>Availability: Mon, Tue, Wed, Thu, Fri, Sat, Sun</p> <p>Contracted Hours: -</p> <p>Monthly Sales Target: £1,500.00</p>			
<input checked="" type="radio"/> Sales <input type="radio"/> Notes				
Written By	Date	Note	Files	Actions
André T	17 Jan, 2015 03:21pm	Notes for the staff member		<a href="#">Edit</a>   <a href="#">Delete</a>
<input type="button" value="Delete Staff Member"/>				

4. Click the **Edit** link. The following page is displayed.

Roberto Raffaeli

 <p>Contact Information Address: - Email: roberto@raffaelli.cc Ph: - <b>Emergency Contact:</b> - Tags <input type="button" value=""/></p>	<p><b>New Note</b> <b>Edit Staff Member</b></p> <p><b>Working Details</b></p> <p>User Level: manager</p> <p>Shop Access: Test Dive Shop, Test Dive Shop</p> <p>Availability: Mon, Tue, Wed, Thu, Fri, Sat, Sun</p> <p>Contracted Hours: -</p> <p>Monthly Sales Target: £1,500.00</p>			
<input checked="" type="radio"/> Sales <input type="radio"/> Notes				
Written By	Date	Note	Files	Actions
André T	17 Jan, 2015 03:21pm	<input type="text" value="Notes for the staff member"/>		<a href="#">Edit</a>   <a href="#">Delete</a>
<input type="button" value="Delete Staff Member"/>				

5. Modify the notes and click outside the field to save.

### Deleting the Note

1. Go to **CRM > Staff**. The following page is displayed.

Staff				
<a href="#">Staff Record</a>				
Name	Phone	Email	Tags	Product Sales
André T	02-4567-8901	demo+1@divecentrehq.com	MSDT	£59,603.01
Vitaliy S	123467579	vitaliy@oceanshq.com		£0.00
Melissa G		melissa@divecentrehq.com	Instructor	£0.00
Roberto Raffaeli		roberto@raffaelli.cc		£1,016.50

Total staff: 4

2. Click the name link of the required staff member to be modified. The following page is displayed.

**Roberto Raffaeli**



Contact Information

Address: -

Email: roberto@raffaelli.cc

Ph: -

[Emergency Contact: -](#)

[Tags](#)

[New Note](#) [Edit Staff Member](#)

**Working Details**

User Level: manager

Shop Access: Test Dive Shop, Test Dive Shop

Availability: Mon, Tue, Wed, Thu, Fri, Sat, Sun

Contracted Hours: -

Monthly Sales Target: £1,500.00

[Sales](#)
[Notes](#)

Order ID	Date	Products	Total	To Pay	Status
8911	16 Jun, 2014 09:18pm	10 x Liquid Skin Mask [Yellow] (£95.00)	£1,016.50	£16.50	<a href="#">Complete</a>

[Delete Staff Member](#)

3. Click **Notes** tab. The following page is displayed.

**Roberto Raffaeli**



Contact Information

Address: -

Email: roberto@raffaelli.cc

Ph: -

[Emergency Contact: -](#)

[Tags](#)

[New Note](#) [Edit Staff Member](#)

**Working Details**

User Level: manager

Shop Access: Test Dive Shop, Test Dive Shop

Availability: Mon, Tue, Wed, Thu, Fri, Sat, Sun

Contracted Hours: -

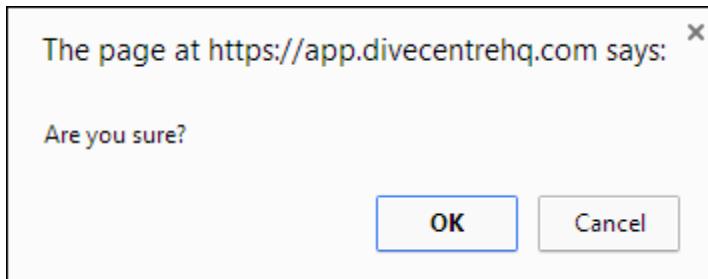
Monthly Sales Target: £1,500.00

[Sales](#)
[Notes](#)

Written By	Date	Note	Files	Actions
André T	17 Jan, 2015 03:21pm	Notes for the staff member		<a href="#">Edit</a>   <a href="#">Delete</a>

[Delete Staff Member](#)

4. Click the **Delete** link. The following popup window is displayed.



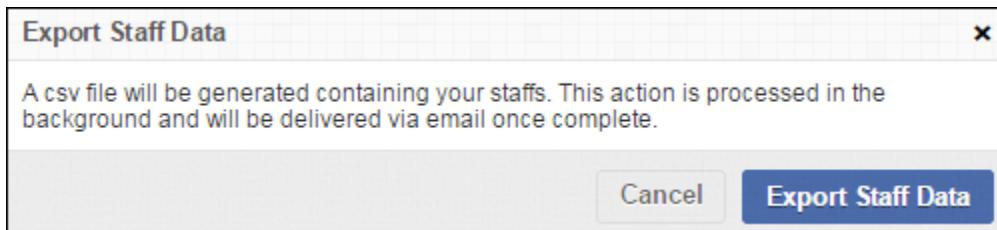
5. Click **OK** to delete.

## Exporting Staff Records

1. Go to **CRM > Staff**. The following page is displayed.

Staff				
 Staff Record				
Name	Phone	Email	Tags	Product Sales
André T	02-4567-8901	demo+1@divecentrehq.com	MSDT	£59,603.01
Vitaliy S	123467579	vitaliy@oceanshq.com		£0.00
Melissa G		melissa@divecentrehq.com	Instructor	£0.00
Roberto Raffaeli		roberto@raffaeli.cc		£1,016.50
Total staff: 4				

2. Click **Export Staff Records**. The following popup is displayed.



3. Click **Export Staff Data**.

## Synching to MailChimp

1. Go to **CRM > Staff**. The following page is displayed.

Staff				
 Staff Record				
Name	Phone	Email	Tags	Product Sales
André T	02-4567-8901	demo+1@divecentrehq.com	MSDT	£59,603.01
Vitaliy S	123467579	vitaliy@oceanshq.com		£0.00
Melissa G		melissa@divecentrehq.com	Instructor	£0.00
Roberto Raffaeli		roberto@raffaeli.cc		£1,016.50
Total staff: 4				

2. Click **Sync to MailChimp**.

## Smart Lists

This option enables you to create Smart Lists as well as modify the existing smart lists.

### Creating Smart List

1. Go to **CRM > Smart Lists**. The following page is displayed.

Smart Lists

 Your Smart Lists

List Name	Conditions
dsd	Product: Purchased >= 1.0 In the last 7 days
Services due	Servicing: Completed >= 10.0 In the last year AND Servicing: Completed is BCD Service (hours) In the last year
A	Product: Purchased >= 10.0 In the last 7 days

Total smart lists: 3



2. Click **New Smart List**. The following page is displayed.

New Smart List

Create A New Smart List

Find customers matching **All** or the following conditions and name it:

+ Add A Condition



3. Select the matching condition (All / Any) from the dropdown list.  
 4. Enter the name of the list in the field.  
 5. Click **Add A Condition**. The following fields are displayed.

New Smart List



Find customers matching **All** or the following conditions and name it:

Product: Purchased **Any Item** More Than **0.0** In the last 7 days **Delete**

+ Add A Condition



6. Select the required conditions from the dropdown list.  
 7. Click **Save Smart List**. The following page is displayed.

Smart List: Event List





Name	Email Address
89yew r320ru2	tedsgjsd@test.com
Adrian Higgins	adrian@divecentrehq.com
Aithne Oakey	aithne.oakey@gmail.com
Andre Curtain	andre.curtain@gmail.com
Andre T	andre@oceanshq.com
Andre Test	andre@oceanshq.com
Ben Diver	ben.diver@gmail.com
Ben Mattes	ben@demo.com

## Modifying the Smart List

1. Go to **CRM > Smart Lists**. The following page is displayed.

Smart Lists

[New Smart List](#)

List Name	Conditions
dsa	Product: Purchased >= 1.0 In the last 7 days
Services due	Servicing: Completed >= 10.0 In the last year AND Servicing: Completed is BCD Service (hours) In the last year
A	Product: Purchased >= 10.0 In the last 7 days

Total smart lists: 3

2. Click list name link of the required list to be modified. The following page is displayed.

Smart List: Event List

[Export Customer Records](#) [Edit Smart List](#) [Email List Members](#)

Name	Email Address
89yewv320ru2	tedsgjsd@test.com
Adrian Higgins	adrian@divercentrehq.com
Aithne Oakey	aithne.oakey@gmail.com
Andre Curtain	andre.curtain@gmail.com
Andre T	andre@oceanshq.com
Andre Test	andre@oceanshq.com
Ben Diver	ben.diver@gmail.com
Ben Mattes	ben@demo.com

3. Click Edit Smart List. The following page is displayed.

Edit Smart List

[Create A New Smart List](#)

Find customers matching  or the following conditions and name it

[+ Add A Condition](#) [Save Smart List](#)

4. Modify the required details and click Save Smart List.

**Note:** To delete a condition, click the Delete link corresponding to the condition.

### Emailing List Members

1. Go to CRM > Smart Lists. The following page is displayed.

Smart Lists

[New Smart List](#)

List Name	Conditions
dsa	Product: Purchased >= 1.0 In the last 7 days
Services due	Servicing: Completed >= 10.0 In the last year AND Servicing: Completed is BCD Service (hours) In the last year
A	Product: Purchased >= 10.0 In the last 7 days

Total smart lists: 3

2. Click list name link of the required list to be modified. The following page is displayed.

Smart List: Event List		<input type="button" value="Export Customer Records"/>	<input type="button" value="Edit Smart List"/>	<input type="button" value="Email List Members"/>
<input type="button" value="My Smart List"/>				
Name	Email Address			
89yew r320ru2	tedsgjsd@test.com			
Adrian Higgins	adrian@divecentrehq.com			
Aithne Oakey	aithne.oakey@gmail.com			
Andre Curtain	andre.curtain@gmail.com			
Andre T	andre@oceanshq.com			
Andre Test	andre@oceanshq.com			
Ben Diver	ben.diver@gmail.com			
Ben Mattes	ben@demo.com			

3. Click **Email List Members**. The following popup window is displayed.

**Email List Members**

<b>Email Subject</b>	<input type="text"/>
<b>Content</b>	<input type="text"/>
	<input type="button" value="Cancel"/> <input type="button" value="Email List Members"/>

4. Enter the subject of the email in the **Email Subject** field.  
 5. Enter the body of the email in the **Content** field.  
 6. Click **Email List Members**.

### Exporting Customer Records

1. Go to **CRM > Smart Lists**. The following page is displayed.

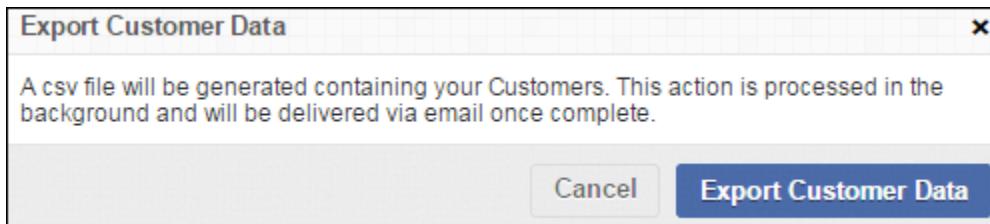
Smart Lists		<input type="button" value="New Smart List"/>
<input type="button" value="Your Smart Lists"/>		
List Name	Conditions	
dsa	Product: Purchased >= 1.0 In the last 7 days	
Services due	Servicing: Completed >= 10.0 In the last year <b>AND</b> Servicing: Completed is BCD Service (hours) In the last year	
A	Product: Purchased >= 10.0 In the last 7 days	

Total smart lists: 3

2. Click list name link of the required list to be modified. The following page is displayed.
-

Smart List: Event List		 Export Customer Records	 Edit Smart List	 Email List Members
 My Smart List				
Name	Email Address			
89yew r320ru2	tedsgjsd@test.com			
Adrian Higgins	adrian@divecentrehq.com			
Aithne Oakey	aithne.oakey@gmail.com			
Andre Curtain	andre.curtain@gmail.com			
Andre T	andre@oceanshq.com			
Andre Test	andre@oceanshq.com			
Ben Diver	den.diver@gmail.com			
Ben Mattes	ben@demo.com			

3. Click **Export Customer Records**. The following popup window displayed.



4. Click **Export Customer Data**.

## Servicing

### All Services

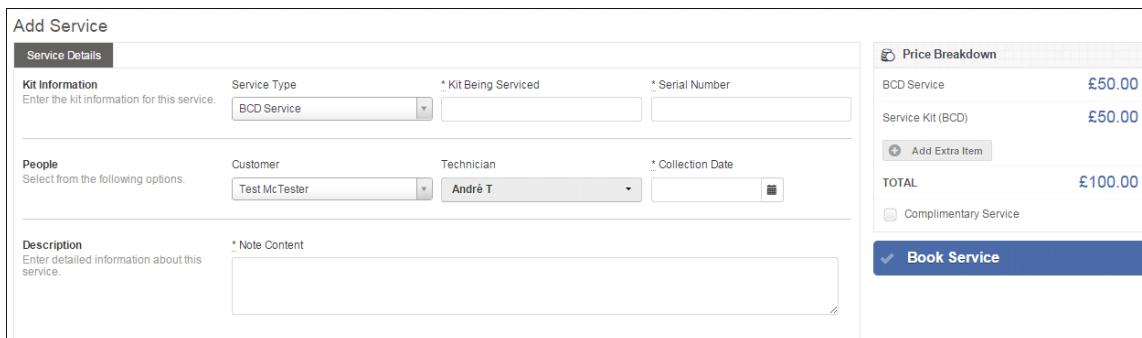
This section displays the list of services along with the status.

### Booking a Service

1. Go to **Servicing > All Services**. The following page is displayed.

Servicing										 Book A Service
Pre-Service					Post-Service					
Booked					Awaiting Collection					0
In Progress					Complete					0
Servicing										
Job	Serial	Kit	Technician	Customer	Booked	Collection	Time	To Pay	Status	
1	BC-31314319	Shop Kit #1	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	4777:54:46	 £100.00	In Progress	
2	SP-832AB	Scubapro Knighthawk Bcd W- Air 2	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	5233:21:57	 £100.00	In Progress	
3	1234	abc	André T	Adrian Higgins	19 Oct, 2012	26 Oct, 2012	00:00:03	 £0.00	Complete	
4	89721	dsa	André T	Walk In	19 Oct, 2012	26 Oct, 2012	00:00:03	 £0.00	Complete	
18	fafda	fasf	André T	Josh Parker	24 Feb, 2013	28 Feb, 2013	27854:13:49	 £100.00	In Progress	
20	98yfdsgihu	BCD 123	André T	Erez King	05 Mar, 2013	29 Mar, 2013	00:00:06	 £100.00	In Progress	
38	O'clock	Ffosl	André T	Mark Byrne	13 Sep, 2013	30 Sep, 2013	00:00:31	 £100.00	In Progress	
63	341513	bcd	André T	Erez King	27 Nov, 2013	29 Nov, 2013	00:00:04	 £100.00	In Progress	
64	12345	MY BCD	André T	Erez King	27 Nov, 2013	30 Nov, 2013	00:00:02	 £100.00	In Progress	
192	1243542452	Mares BCD	André T	Lone Light	25 Jun, 2014	04 Jul, 2014	00:00:04	 Paid	Complete	
219	24314513	Standard Reg	André T	Erez King	08 Aug, 2014	29 Aug, 2014	00:00:31	 £67.50	Awaiting Collection	
Total Services: 11										

2. Click **Book A Service**. The following page is displayed.



The screenshot shows the 'Add Service' form. On the left, there are four tabs: 'Service Details' (selected), 'Kit Information', 'People', and 'Description'. Under 'Service Details', there are fields for 'Service Type' (BCD Service), 'Kit Being Serviced', and 'Serial Number'. Under 'People', there are dropdowns for 'Customer' (Test McTester) and 'Technician' (André T). Under 'Description', there is a note content field. On the right, there is a 'Price Breakdown' table with one row: BCD Service at £50.00, Service Kit (BCD) at £50.00, and a total of £100.00. There is also a checkbox for 'Complimentary Service' and a blue 'Book Service' button.

### 3. Service Details

- Kit Information
  - i. Select the type of service from the **Service Type** dropdown list.
  - ii. Enter the name of the kit being serviced in the **Kit Being Serviced** field.
  - iii. Enter the serial number of the service in the **Serial Number** field.
- People
  - i. Select the name of the customer from the **Customer** dropdown list.
  - ii. Select the technician from the **Technician** dropdown list.
  - iii. Click the **Collection Date** field to select the date for collecting the item from the calendar.
- Description
  - i. Enter a brief description about the service done in the **Note Content** field.

4. To add an extra item, click **Add Extra Item**. The following popup window is displayed.

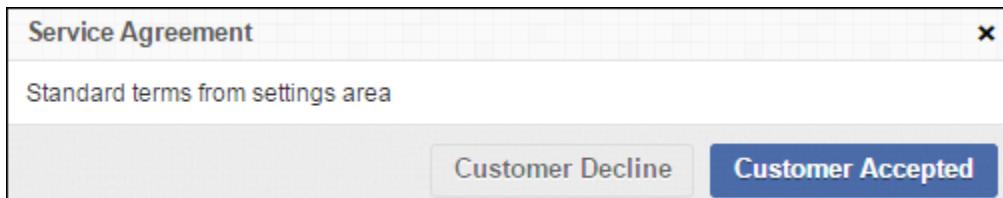


The screenshot shows a 'Add Product to Service' dialog box. It has a text input field containing 'Flaps' and two buttons at the bottom: 'Cancel' and a blue 'Add Product to Service' button.

5. Select the required item to be included from the dropdown list and click **Add Product to Service**.

**Note:** If this is a complimentary service, select the Complimentary Service checkbox.

6. Click **Book Service**. The following popup window is displayed.



The screenshot shows a 'Service Agreement' dialog box. It contains the text 'Standard terms from settings area' and two buttons at the bottom: 'Customer Decline' and a blue 'Customer Accepted' button.

7. Click **Customer Accepted**. The following page is displayed.

Service ID: 264

No image uploaded	Customer: Test McTester Address: - Email: andre+testmctester@oceanshq.com Ph: - Mob: - Serial Number: 11121 Quoted Price: £82.50	<input type="button" value="New Note"/> <input type="button" value="Edit Service"/> <input checked="" type="button" value="Mark Service as Complete"/>										
Servicing Timer		<input type="button" value="Start Timer"/> 00:00:00										
<input type="button" value="Overview"/> <input type="button" value="Servicing History"/> <table border="1"> <thead> <tr> <th>Technician</th> <th>Notes</th> <th>Photos</th> <th>Date</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>André T</td> <td>Cylinder</td> <td>-</td> <td>17 Jan, 2015 05:50pm</td> <td><a href="#">Edit</a>   <a href="#">Delete</a></td> </tr> </tbody> </table>			Technician	Notes	Photos	Date	Actions	André T	Cylinder	-	17 Jan, 2015 05:50pm	<a href="#">Edit</a>   <a href="#">Delete</a>
Technician	Notes	Photos	Date	Actions								
André T	Cylinder	-	17 Jan, 2015 05:50pm	<a href="#">Edit</a>   <a href="#">Delete</a>								
<input type="button" value="Delete Service"/>												

**Note:** You can click the Start Timer to track the time taken to service the item. The status of the service is changed to In Progress.

### Modifying the Service

1. Go to **Servicing > All Services**. The following page is displayed.

Servicing

Pre-Service		Post-Service		<input type="button" value="Book A Service"/>																																																																																																																								
Booked	0	Awaiting Collection	0																																																																																																																									
In Progress	0	Complete	0																																																																																																																									
<input type="button" value="Servicing"/> <table border="1"> <thead> <tr> <th>Job</th> <th>Serial</th> <th>Kit</th> <th>Technician</th> <th>Customer</th> <th>Booked</th> <th>Collection</th> <th>Time</th> <th>To Pay</th> <th>Status</th> </tr> </thead> <tbody> <tr><td>1</td><td>BC-31314319</td><td>Shop Kit #1</td><td>André T</td><td>Adrian Higgins</td><td>18 Oct, 2012</td><td>26 Oct, 2012</td><td>4777:54:46</td><td> £100.00</td><td>In Progress</td></tr> <tr><td>2</td><td>SP-832AB</td><td>Scubapro Knighthawk Bcd W/ Air 2</td><td>André T</td><td>Adrian Higgins</td><td>18 Oct, 2012</td><td>26 Oct, 2012</td><td>5233:21:57</td><td> £100.00</td><td>In Progress</td></tr> <tr><td>3</td><td>1234</td><td>abc</td><td>André T</td><td>Adrian Higgins</td><td>19 Oct, 2012</td><td>26 Oct, 2012</td><td>00:00:03</td><td> £0.00</td><td>Complete</td></tr> <tr><td>4</td><td>89721</td><td>dsa</td><td>André T</td><td>Walk In</td><td>19 Oct, 2012</td><td>26 Oct, 2012</td><td>00:00:03</td><td> £0.00</td><td>Complete</td></tr> <tr><td>18</td><td>fafda</td><td>fasf</td><td>André T</td><td>Josh Parker</td><td>24 Feb, 2013</td><td>28 Feb, 2013</td><td>27854:13:49</td><td> £100.00</td><td>In Progress</td></tr> <tr><td>20</td><td>98yfdighu</td><td>BCD 123</td><td>André T</td><td>Erez King</td><td>05 Mar, 2013</td><td>29 Mar, 2013</td><td>00:00:06</td><td> £100.00</td><td>In Progress</td></tr> <tr><td>38</td><td>O'clock</td><td>Ffosl</td><td>André T</td><td>Mark Byrne</td><td>13 Sep, 2013</td><td>30 Sep, 2013</td><td>00:00:31</td><td> £100.00</td><td>In Progress</td></tr> <tr><td>63</td><td>341513</td><td>bcd</td><td>André T</td><td>Erez King</td><td>27 Nov, 2013</td><td>29 Nov, 2013</td><td>00:00:04</td><td> £100.00</td><td>In Progress</td></tr> <tr><td>64</td><td>12345</td><td>MY BCD</td><td>André T</td><td>Erez King</td><td>27 Nov, 2013</td><td>30 Nov, 2013</td><td>00:00:02</td><td> £100.00</td><td>In Progress</td></tr> <tr><td>192</td><td>1243542452</td><td>Mares BCD</td><td>André T</td><td>Lone Light</td><td>25 Jun, 2014</td><td>04 Jul, 2014</td><td>00:00:04</td><td> Paid</td><td>Complete</td></tr> <tr><td>219</td><td>24314513</td><td>Standard Reg</td><td>André T</td><td>Erez King</td><td>08 Aug, 2014</td><td>29 Aug, 2014</td><td>00:00:31</td><td> £67.50</td><td>Awaiting Collection</td></tr> </tbody> </table>					Job	Serial	Kit	Technician	Customer	Booked	Collection	Time	To Pay	Status	1	BC-31314319	Shop Kit #1	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	4777:54:46	£100.00	In Progress	2	SP-832AB	Scubapro Knighthawk Bcd W/ Air 2	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	5233:21:57	£100.00	In Progress	3	1234	abc	André T	Adrian Higgins	19 Oct, 2012	26 Oct, 2012	00:00:03	£0.00	Complete	4	89721	dsa	André T	Walk In	19 Oct, 2012	26 Oct, 2012	00:00:03	£0.00	Complete	18	fafda	fasf	André T	Josh Parker	24 Feb, 2013	28 Feb, 2013	27854:13:49	£100.00	In Progress	20	98yfdighu	BCD 123	André T	Erez King	05 Mar, 2013	29 Mar, 2013	00:00:06	£100.00	In Progress	38	O'clock	Ffosl	André T	Mark Byrne	13 Sep, 2013	30 Sep, 2013	00:00:31	£100.00	In Progress	63	341513	bcd	André T	Erez King	27 Nov, 2013	29 Nov, 2013	00:00:04	£100.00	In Progress	64	12345	MY BCD	André T	Erez King	27 Nov, 2013	30 Nov, 2013	00:00:02	£100.00	In Progress	192	1243542452	Mares BCD	André T	Lone Light	25 Jun, 2014	04 Jul, 2014	00:00:04	Paid	Complete	219	24314513	Standard Reg	André T	Erez King	08 Aug, 2014	29 Aug, 2014	00:00:31	£67.50	Awaiting Collection
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Total Services: 11																																																																																																																												

2. Click the Job ID link to view the details of the booking. The following page is displayed.

Service ID: 264

No image uploaded	Customer: Test McTester Address: - Email: andre+testmctester@oceanshq.com Ph: - Mob: - Serial Number: 11121 Quoted Price: £82.50	<input type="button" value="New Note"/> <input type="button" value="Edit Service"/> <input checked="" type="button" value="Mark Service as Complete"/>										
Servicing Timer		<input type="button" value="Start Timer"/> 00:00:00										
<input type="button" value="Overview"/> <input type="button" value="Servicing History"/> <table border="1"> <thead> <tr> <th>Technician</th> <th>Notes</th> <th>Photos</th> <th>Date</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>André T</td> <td>Cylinder</td> <td>-</td> <td>17 Jan, 2015 05:50pm</td> <td><a href="#">Edit</a>   <a href="#">Delete</a></td> </tr> </tbody> </table>			Technician	Notes	Photos	Date	Actions	André T	Cylinder	-	17 Jan, 2015 05:50pm	<a href="#">Edit</a>   <a href="#">Delete</a>
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André T	Cylinder	-	17 Jan, 2015 05:50pm	<a href="#">Edit</a>   <a href="#">Delete</a>								
<input type="button" value="Delete Service"/>												

3. Click **Edit Service**. The following page is displayed.

**Edit Service**

<b>Service Details</b>																			
Kit Information Enter the kit information for this service.	Service Type Regulator Service	* Kit Being Serviced Cylinder	* Serial Number 11121																
People Select from the following options.	Customer Test McTester	Technician André T	* Collection Date 2015-01-19																
Description Enter detailed information about this service.	* Note Content Cylinder																		
<table border="1"> <tr> <td colspan="2"><b>Price Breakdown</b></td> </tr> <tr> <td>Regulator Service</td> <td>£22.50</td> </tr> <tr> <td>Service Kit (Regs)</td> <td>£45.00</td> </tr> <tr> <td>Flaps [Remove]</td> <td>£15.00</td> </tr> <tr> <td><input type="checkbox"/> Add Extra Item</td> <td></td> </tr> <tr> <td><b>TOTAL</b></td> <td><b>£82.50</b></td> </tr> <tr> <td colspan="2"><input type="checkbox"/> Complimentary Service</td> </tr> <tr> <td colspan="2"><b>Book Service</b></td> </tr> </table>				<b>Price Breakdown</b>		Regulator Service	£22.50	Service Kit (Regs)	£45.00	Flaps [Remove]	£15.00	<input type="checkbox"/> Add Extra Item		<b>TOTAL</b>	<b>£82.50</b>	<input type="checkbox"/> Complimentary Service		<b>Book Service</b>	
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<b>TOTAL</b>	<b>£82.50</b>																		
<input type="checkbox"/> Complimentary Service																			
<b>Book Service</b>																			

4. Modify the required details and click **Book Service**.

### Adding a Note

1. Go to **Servicing > All Services**. The following page is displayed.

Servicing									
Pre-Service					Post-Service				
Booked					Awaiting Collection				
In Progress					Complete				
Servicing									
Job	Serial	Kit	Technician	Customer	Booked	Collection	Time	To Pay	Status
1	BC-31314319	Shop Kit #1	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	4777:54:46	£100.00	In Progress
2	SP-832AB	Scubapro Knighthawk Bcd W-Air 2	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	5233:21:57	£100.00	In Progress
3	1234	abc	André T	Adrian Higgins	19 Oct, 2012	26 Oct, 2012	00:00:03	£0.00	Complete
4	89721	dsa	André T	Walk In	19 Oct, 2012	26 Oct, 2012	00:00:03	£0.00	Complete
18	fafda	fasf	André T	Josh Parker	24 Feb, 2013	28 Feb, 2013	27854:13:49	£100.00	In Progress
20	98yfdsgihu	BCD 123	André T	Erez King	05 Mar, 2013	29 Mar, 2013	00:00:06	£100.00	In Progress
38	O'clock	Ffosl	André T	Mark Byrne	13 Sep, 2013	30 Sep, 2013	00:00:31	£100.00	In Progress
63	341513	bcd	André T	Erez King	27 Nov, 2013	29 Nov, 2013	00:00:04	£100.00	In Progress
64	12345	MY BCD	André T	Erez King	27 Nov, 2013	30 Nov, 2013	00:00:02	£100.00	In Progress
192	1243542452	Mares BCD	André T	Lone Light	25 Jun, 2014	04 Jul, 2014	00:00:04	Paid	Complete
219	24314513	Standard Reg	André T	Erez King	08 Aug, 2014	29 Aug, 2014	00:00:31	£67.50	Awaiting Collection
Total Services: 11									

2. Click the Job ID link to view the details of the booking. The following page is displayed.

Service ID: 264		New Note	Edit Service	<input checked="" type="checkbox"/> Mark Service as Complete
 No image uploaded		Customer: Test McTester Address: - Email: andre-testmctester@oceanshq.com Ph: - Mobb: -  Serial Number: 11121  Quoted Price: £82.50		
<input type="button" value="Overview"/> <input type="button" value="Servicing History"/>		<input type="button" value="Start Timer"/> 00:00:00		
Technician	Notes	Photos	Date	Actions
André T	Cylinder	-	17 Jan, 2015 05:50pm	<a href="#">Edit</a>   <a href="#">Delete</a>
<input type="button" value="Delete Service"/>				

3. Click **New Note**. The following popup window is displayed.

Add Service Note

\* Note Content  
...

Email Note to customer

4. Enter the notes in the **Note Content** field.
5. To add an attachment, click Add Attachment. The following fields are displayed.

Add Service Note

\* Note Content  
...

Upload File

Email Note to customer

6. Click **Select File** to upload a file.

**Note:** To email the notes to the customer, select the **Email Note to Customer** checkbox.

7. Click **Add Service Note**.

#### Modifying the Note

1. Go to **Servicing > All Services**. The following page is displayed.

Servicing										<a href="#">Book A Service</a>
Pre-Service					Post-Service					
Booked					Awaiting Collection					0
In Progress					Complete					0
<b>Servicing</b>										
Job	Serial	Kit	Technician	Customer	Booked	Collection	Time	To Pay	Status	
1	BC-31314319	Shop Kit#1	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	4777:54:46	£100.00	In Progress	
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219	24314513	Standard Reg	André T	Erez King	08 Aug, 2014	29 Aug, 2014	00:00:31	£67.50	Awaiting Collection	
Total Services: 11										

2. Click the Job ID link to view the details of the booking. The following page is displayed.

Service ID: 264		<a href="#">New Note</a>		<a href="#">Edit Service</a>	<a href="#">Mark Service as Complete</a>
 No image uploaded		Customer: Test McTester Address: - Email: andre-testmctester@oceanshq.com Ph: - Mob: -   Serial Number: 11121  Quoted Price: £82.50		<a href="#">Start Timer</a> <b>00:00:00</b>	
<a href="#">Overview</a>		<a href="#">Servicing History</a>			
Technician	Notes	Photos	Date	Actions	
André T	Cylinder	-	17 Jan, 2015 05:50pm	<a href="#">Edit</a>   <a href="#">Delete</a>	
<a href="#">Delete Service</a>					

3. Click **Edit** corresponding to the note to be modified. The following popup is displayed.

### Edit Service Note

\* Note Content

...  
Cylinder

[Add Attachment](#)

Email Note to customer

[Cancel](#)
**Add Service Note**

4. Modify the required details and click **Add Service Note**.

#### Deleting the Note

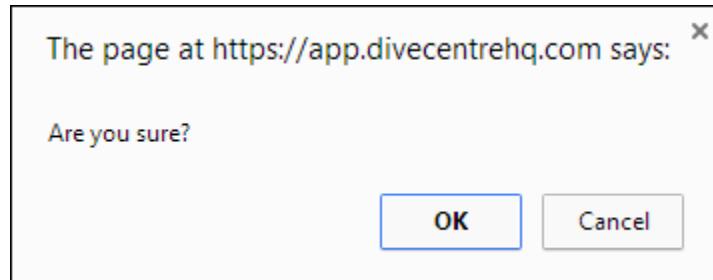
1. Go to **Servicing > All Services**. The following page is displayed.

Servicing										<a href="#">Book A Service</a>
Pre-Service					Post-Service					
Booked					Awaiting Collection					0
In Progress					Complete					0
<b>Servicing</b>										
Job	Serial	Kit	Technician	Customer	Booked	Collection	Time	To Pay	Status	
1	BC-31314319	Shop Kit#1	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	4777:54:46	£100.00	In Progress	
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219	24314513	Standard Reg	André T	Erez King	08 Aug, 2014	29 Aug, 2014	00:00:31	£67.50	Awaiting Collection	
Total Services: 11										

2. Click the Job ID link to view the details of the booking. The following page is displayed.

Service ID: 264		Customer: Test McTester			New Note			Edit Service		<input checked="" type="checkbox"/> <a href="#">Mark Service as Complete</a>
 No image uploaded		Address: - Email: andre-testmctester@oceanshq.com Ph: - Mob: -			<a href="#">Start Timer</a>			00:00:00		
<a href="#">Overview</a>		<a href="#">Servicing History</a>								
Technician	Notes	Photos	Date	Actions						
André T	Cylinder	-	17 Jan, 2015 05:50pm	<a href="#">Edit</a>   <a href="#">Delete</a>						
<a href="#">Delete Service</a>										

3. Click **Delete** corresponding to the note to be deleted. The following popup is displayed.



4. Click **OK** to be delete.

### Closing the Service

1. Go to **Servicing > All Services**. The following page is displayed.

Servicing											
Pre-Service		Post-Service									
Booked		Awaiting Collection		0		Complete		0		0	
In Progress				0							
<b>Servicing</b>											
Job	Serial	Kit	Technician	Customer	Booked	Collection	Time	To Pay	Status		
1	BC-31314319	Shop Kit#1	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	4777:54:46	£100.00	In Progress		
2	SP-832AB	Scubapro Knighthawk Bcd W-Air 2	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	5233:21:57	£100.00	In Progress		
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219	24314513	Standard Reg	André T	Erez King	08 Aug, 2014	29 Aug, 2014	00:00:31	£67.50	Awaiting Collection		

Total Services: 11

2. Click the Job ID link to view the details of the booking. The following page is displayed.

Service ID: 264											
	No image uploaded	Customer: Test McTester		New Note	Edit Service	<input checked="" type="checkbox"/> Mark Service as Complete					
		Address: -		Servicing Timer							
		Email: andre-testmctester@oceanshq.com									
		Ph: -									
		Mob: -									
		Serial Number: 11121									
		Quoted Price: £82.50									
<input type="checkbox"/> Overview		<input type="checkbox"/> Servicing History									
Technician	Notes	Photos	Date	Actions							
André T	Cylinder	-	17 Jan, 2015 05:50pm	<a href="#">Edit</a>   <a href="#">Delete</a>							
<a href="#">Delete Service</a>											

3. Click **Mark Service As Complete**. The following popup window is displayed.

**Mark Service as Complete**

By marking this job as complete, an invoice will be generated for this customer.  
If you've setup a payment gateway, the customer will be given the option to pay for the service online.

SEND INVOICE VIA EMAIL TO CUSTOMER

**Add to New Sale**  
Mark this sale as complete and add to new sale.

**Complete Service & Raise Invoice**

---

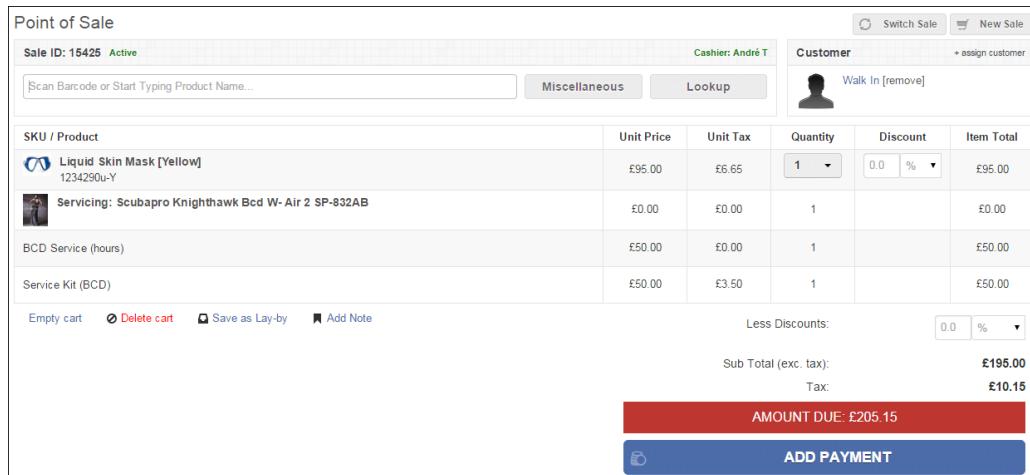
**Add to Existing Sale**  
Mark this sale as complete and add to new sale.

**Test McTester - #15425**

**Complete Service & Add to Existing Sale**

**Cancel**

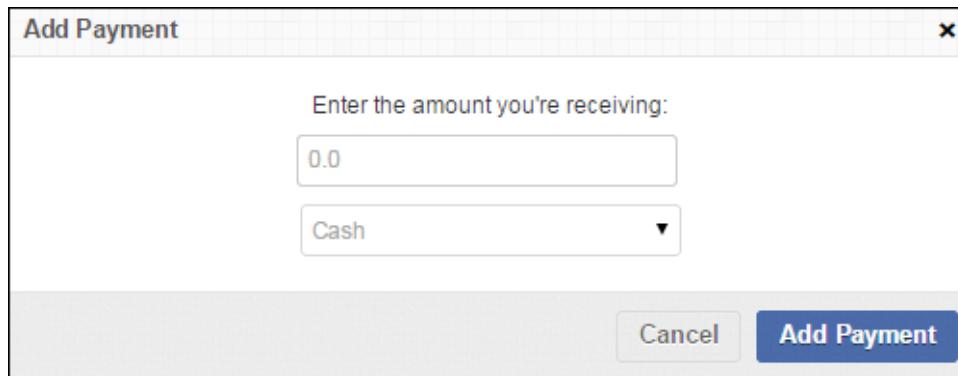
4. Select the required option.
- Add to New Sale
    - i. Click **Complete Service & Raise Invoice**. Refer [Creating a New Sale](#) for more information on how to pay.
  - Add to Existing Sale
    - i. Select the invoice from the dropdown list.
    - ii. Click **Complete Service & Add to Existing Sale**. This adds the invoice to an existing sale and the following page is displayed.



The screenshot shows the POS software interface with the following details:

- Sale ID:** 15425 Active
- Cashier:** André T
- Customer:** Walk In [remove]
- SKU / Product:**
  - Liquid Skin Mask [Yellow] 1234290u-Y
  - Servicing: Scubapro Knighthawk Bcd W-Air 2 SP-832AB
  - BCD Service (hours)
  - Service Kit (BCD)
- Unit Price:** £95.00, £0.00, £50.00, £50.00
- Unit Tax:** £6.65, £0.00, £0.00, £3.50
- Quantity:** 1, 1, 1, 1
- Discount:** 0.0 %, 0.0 %, 0.0 %, 0.0 %
- Item Total:** £95.00, £0.00, £50.00, £50.00
- Less Discounts:** 0.0 %
- Sub Total (exc. tax):** £195.00
- Tax:** £10.15
- AMOUNT DUE:** £205.15
- Buttons:** Empty cart, Delete cart, Save as Lay-by, Add Note, ADD PAYMENT

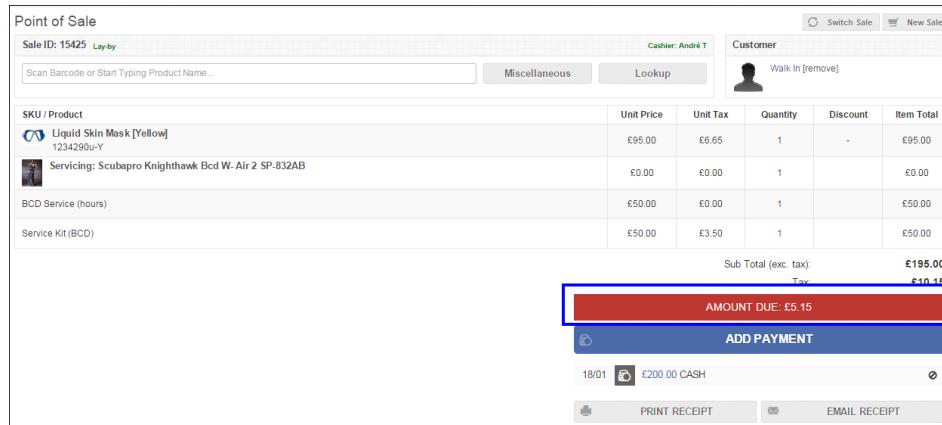
- iii. Click **Add Payment**. The following popup window is displayed.



The 'Add Payment' popup window contains the following fields:

- Enter the amount you're receiving:
- Mode of payment dropdown: Cash
- Buttons: Cancel, Add Payment

- iv. Enter the received amount in the **Enter the amount you're receiving** field.  
v. Select the mode of payment from the dropdown list.  
vi. Click **Add Payment**.
- If full payment is not received, the due amount is displayed as shown.



SKU / Product	Unit Price	Unit Tax	Quantity	Discount	Item Total
Liquid Skin Mask [Yellow] 1234290z-Y	£95.00	£6.65	1	-	£95.00
Servicing: Scubapro Knighthawk Bcd W-Air 2 SP-832AB	£0.00	£0.00	1		£0.00
BCD Service (hours)	£50.00	£0.00	1		£50.00
Service Kit (BCD)	£50.00	£3.50	1		£50.00
Sub Total (exc. tax):					<b>£195.00</b>
Tax:					<b>£10.15</b>
<b>AMOUNT DUE: £5.15</b>					
<b>ADD PAYMENT</b>					
18/01  £200.00 CASH					
<input type="button" value="PRINT RECEIPT"/> <input type="button" value="EMAIL RECEIPT"/>					

## Booked

This section displays the list of services with status Booked.

1. Go to **Servicing > Booked**. The following page is displayed.



Servicing: Booked										Book A Service
Servicing										
Job	Serial	Kit	Technician	Customer	Booked	Collection	Time	To Pay	Status	
265	22222	Flaps	André T	Test McTester	17 Jan, 2015	21 Jan, 2015	00:00:00	£67.50	Booked	
Total Services: 1										

2. Refer to [All Services](#) section for more information.

## In Progress

This section displays the list of services with status In Progress.

1. Go to **Servicing > In Progress**. The following page is displayed.



Servicing: In Progress										Book A Service
Servicing										
Job	Serial	Kit	Technician	Customer	Booked	Collection	Time	To Pay	Status	
1	BC-31314319	Shop Kit #1	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	4777:54:46	£100.00	In Progress	
2	SP-832AB	Scubapro Knighthawk Bcd W-Air 2	André T	Adrian Higgins	18 Oct, 2012	26 Oct, 2012	5233:21:57	£100.00	In Progress	
18	fafda	fast	André T	Josh Parker	24 Feb, 2013	28 Feb, 2013	27855:26:28	£100.00	In Progress	
20	98yfdsighu	BCD 123	André T	Erez King	05 Mar, 2013	29 Mar, 2013	00:00:06	£100.00	In Progress	
38	O'clock	Ffosl	André T	Mark Byrne	13 Sep, 2013	30 Sep, 2013	00:00:31	£100.00	In Progress	
63	341513	bcd	André T	Erez King	27 Nov, 2013	29 Nov, 2013	00:00:04	£100.00	In Progress	
64	12345	MY BCD	André T	Erez King	27 Nov, 2013	30 Nov, 2013	00:00:02	£100.00	In Progress	
Total Services: 7										

2. Refer to [All Services](#) section for more information.

## To Collect

This section displays the list of services with status Awaiting collection.

1. Go to **Servicing > To collect**. The following page is displayed.

Servicing: Awaiting Collection										<a href="#">Book A Service</a>
<a href="#">Servicing</a>										
Job	Serial	Kit	Technician	Customer	Booked	Collection	Time	To Pay	Status	
264	11121	Cylinder	André T	Test McTester	17 Jan, 2015	19 Jan, 2015	00:00:05	£67.50	Awaiting Collection	
219	24314513	Standard Reg	André T	Erez King	08 Aug, 2014	29 Aug, 2014	00:00:31	£67.50	Awaiting Collection	

Total Services: 2

2. Refer to [All Services](#) section for more information.

## Complete

This section displays the list of services with status Awaiting collection.

1. Go to **Servicing > Complete**. The following page is displayed.

Servicing: Complete										<a href="#">Book A Service</a>
<a href="#">Servicing</a>										
Job	Serial	Kit	Technician	Customer	Booked	Collection	Time	To Pay	Status	
3	1234	abc	André T	Adrian Higgins	19 Oct, 2012	26 Oct, 2012	00:00:03	£0.00	Complete	
4	89721	dsa	André T	Walk In	19 Oct, 2012	26 Oct, 2012	00:00:03	£0.00	Complete	
192	1243542452	Mares BCD	André T	Lone Light	25 Jun, 2014	04 Jul, 2014	00:00:04	Paid	Complete	

Total Services: 3

2. Refer to [All Services](#) section for more information.

## Rental

### All Rentals

This section displays the list of rental items along with the status.

#### Creating a Rental

1. Go to **Rental > All Rentals**. The following page is displayed.

Rentals		<a href="#">Create Rental</a>
<a href="#">Pre-Rental</a>		<a href="#">Post-Rental</a>
Payment Pending	7	In Progress
Booked	0	Overdue
		Complete

Rentals						
ID ▾	Kit	Customer	Pickup Date	Return Date	To Pay	Status
464	Mares BCD Small New	Erez King	19 Jan, 2015	20 Jan, 2015	£110.00	Payment Pending
463	Mares BCD Small	Test McTester	18 Jan, 2015	18 Jan, 2015	PAID	Overdue
462	-	Erez King	14 Jan, 2015	14 Jan, 2015	£100.00	Payment Pending
461	-	Andre T	17 Jan, 2015	17 Jan, 2015	£0.00	Payment Pending
460	-	Lone Light	04 Dec, 2014	05 Dec, 2014	£0.00	Payment Pending
299	Mares BCD Small	Erez King	10 Aug, 2014	14 Aug, 2014	PAID	Overdue
221	Mares BCD Small	Lone Light	23 Jul, 2014	26 Jul, 2014	£0.00	Payment Pending
13	Mares BCD Small	Lone Light	10 Jun, 2014	19 Jun, 2014	£100.00	Payment Pending
6	Mares BCD Small	Lone Light	18 Jun, 2014	20 Jun, 2014	£10.00	Payment Pending

Total rentals: 9

2. Click **Create Rental**. The following popup window is displayed.

**Create Rental**

Select a customer and setup the collection / return dates for this rental. Once setup, you will be able to add items to rental.

**Customer**

Test McTester

Pickup Date      Return Date

**Create Rental**

3. Select the customer from the **Customer** dropdown list.
4. Click the **Pickup Date** field to select the pickup date of the item from the calendar.
5. Click the **Return Date** field to select the return date of the item from the calendar.
6. Click **Create Rental**. The following page is displayed.

**New / Edit Rental**

Rental ID: 466 Payment Pending      Cashier: André T

Scan Barcode or Start Typing Rental Product Name...      **Lookup Item**

SKU / Product	Price/day	Days	Tax	Quantity	Sub-Total	Discount
<input checked="" type="checkbox"/> Delete Rental <input type="checkbox"/> Add Note						
					Overall Discount: £0.00	£0.00
					Sub Total (exc. tax): £0.00	£0.00
					Tax: £0.00	£0.00
<b>AMOUNT DUE: £0.00</b>						
<b>ADD PAYMENT</b>						

7. Scan the bar code of the item or enter the product name to locate it. You can also click [Lookup Item](#) to locate the required item. The following page is displayed.

**New / Edit Rental**

Rental ID: 466 Payment Pending      Cashier: André T

Scan Barcode or Start Typing Rental Product Name...      **Lookup Item**

SKU / Product	Price/day	Days	Tax	Quantity	Sub-Total	Discount
 Mares BCD Small MARES-BCD-SM	£10.00	1	£1.00	1 ▾	£10.00	0.0 % ▾
<input checked="" type="checkbox"/> Delete Rental <input type="checkbox"/> Add Note					Overall Discount: £0.00	£0.00
					Sub Total (exc. tax): £10.00	£10.00
					Tax: £1.00	£1.00
<b>AMOUNT DUE: £11.00</b>						
<b>ADD PAYMENT</b>						

8. Click **Add Payment**. The following popup window is displayed.

**Add Payment**

Enter the amount you're receiving:

Cash

**Cancel** **Add Payment**

9. Enter the received amount in the **Enter the amount you're receiving** field.
10. Select the mode of payment from the dropdown list.
11. Click **Add Payment**.

- If full payment is not received, the due amount is displayed as shown.

**New / Edit Rental**

Rental ID: 466 **Payment Pending** Cashier: André T

A payment has been assigned to this rental, and therefore cannot be amended.  
Dates: 19 Jan, 2015 to 19 Jan, 2015

SKU / Product	Price/day	Days	Tax	Quantity	Sub-Total	Discount
Mares BCD Small MARES-BCD-SM	£10.00	1	£1.00	1	£10.00	-

**Delete Rental** **Add Note**

Overall Discount: £0.00  
Sub Total (exc. tax): £10.00  
Tax: £1.00

**AMOUNT DUE: £4.00**

**ADD PAYMENT**

17/01 £7.00 CASH

### Changing the Rental Status

This option enables you to change the rental status for the invoices that are paid fully.

1. From the All Rentals page, click the ID link of the invoice that is fully paid. The following page is displayed.

**Rental #466**

Rental ID: 466 **Booked** Cashier: André T

A payment has been assigned to this rental, and therefore cannot be amended.  
Dates: 19 Jan, 2015 to 19 Jan, 2015

SKU / Product	Price/day	Days	Tax	Quantity	Sub-Total	Discount
Mares BCD Small MARES-BCD-SM	£10.00	1	£1.00	1	£10.00	-

**Change Rental Status**

Overall Discount: £0.00  
Sub Total (exc. tax): £10.00  
Tax: £1.00

**NET DUE: £11.00**

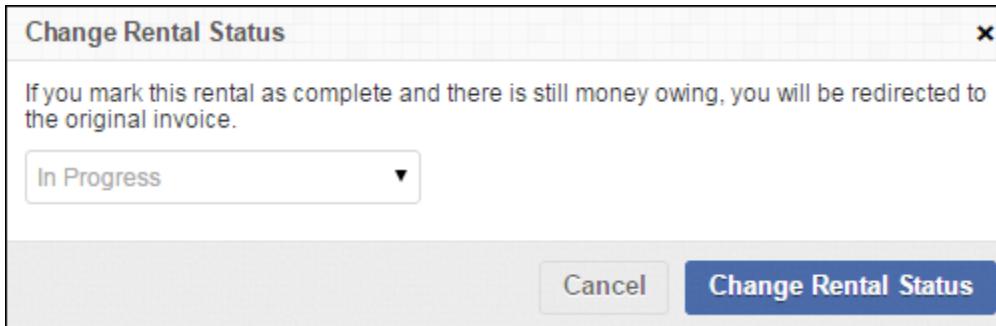
**LESS TOTAL PAYMENT: £11.00**

17/01 £4.00 CASH  
17/01 £7.00 CASH

**CHANGE: £0.00**

**PRINT RECEIPT** **EMAIL RECEIPT**

2. Click **Change Rental Status**. The following popup window is displayed.



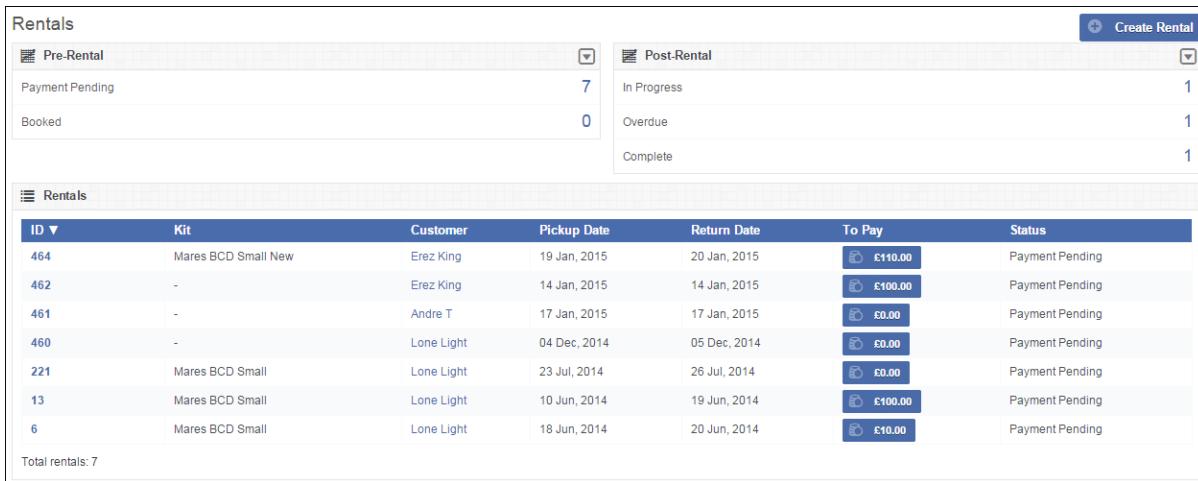
The screenshot shows a modal dialog titled "Change Rental Status". It contains a message: "If you mark this rental as complete and there is still money owing, you will be redirected to the original invoice." Below the message is a dropdown menu set to "In Progress". At the bottom right are two buttons: "Cancel" and a blue "Change Rental Status" button.

3. Select the required status from the dropdown list.  
 4. Click **Change Rental Status**.

### **Pay Pending**

This section displays the list of rentals that are with status Payment Pending.

1. Go to **Rental > Pay Pending**. The following page is displayed.



The screenshot shows a table titled "Rentals" with two sections: "Pre-Rental" and "Post-Rental". The "Pre-Rental" section shows 7 items: "Payment Pending" (7), "Booked" (0). The "Post-Rental" section shows 1 item: "In Progress" (1), "Overdue" (1), "Complete" (1). Below the sections is a table titled "Rentals" with columns: ID, Kit, Customer, Pickup Date, Return Date, To Pay, and Status. The data is as follows:

ID	Kit	Customer	Pickup Date	Return Date	To Pay	Status
464	Mares BCD Small New	Erez King	19 Jan, 2015	20 Jan, 2015	£110.00	Payment Pending
462	-	Erez King	14 Jan, 2015	14 Jan, 2015	£100.00	Payment Pending
461	-	Andre T	17 Jan, 2015	17 Jan, 2015	£0.00	Payment Pending
460	-	Lone Light	04 Dec, 2014	05 Dec, 2014	£0.00	Payment Pending
221	Mares BCD Small	Lone Light	23 Jul, 2014	26 Jul, 2014	£0.00	Payment Pending
13	Mares BCD Small	Lone Light	10 Jun, 2014	19 Jun, 2014	£100.00	Payment Pending
6	Mares BCD Small	Lone Light	18 Jun, 2014	20 Jun, 2014	£10.00	Payment Pending

Total rentals: 7

2. Refer [All Rental](#) section on how to create new rentals and make payments.

### **Booked**

This section displays the list of rentals that are with status Booked.

1. Go to **Rental > Booked**. The following page is displayed.

Rentals		Post-Rental				
Pre-Rental		Post-Rental				
Payment Pending	8	In Progress	1			
Booked	1	Overdue	1			
		Complete	2			
<b>Rentals</b>						
ID	Kit	Customer	Pickup Date	Return Date	To Pay	Status
469	Mares BCD Small	Test McTester	19 Jan, 2015	20 Jan, 2015	 PAID	Booked
Total rentals: 1						

2. Refer [All Rental](#) section on how to create new rentals and make payments.

## In Progress

This section displays the list of rentals that are with status In Progress.

1. Go to **Rental > In Progress**. The following page is displayed.

Rentals		Post-Rental				
Pre-Rental		Post-Rental				
Payment Pending	7	In Progress	1			
Booked	0	Overdue	1			
		Complete	2			
<b>Rentals</b>						
ID	Kit	Customer	Pickup Date	Return Date	To Pay	Status
466	Mares BCD Small	Test McTester	19 Jan, 2015	19 Jan, 2015	 PAID	In Progress
Total rentals: 1						

2. Refer [All Rental](#) section on how to create new rentals and make payments.

## Overdue

This section displays the list of rentals that are with status Overdue.

1. Go to **Rental > Overdue**. The following page is displayed.

Rentals		Post-Rental				
Pre-Rental		Post-Rental				
Payment Pending	7	In Progress	1			
Booked	0	Overdue	1			
		Complete	2			
<b>Rentals</b>						
ID	Kit	Customer	Pickup Date	Return Date	To Pay	Status
299	Mares BCD Small	Erez King	10 Aug, 2014	14 Aug, 2014	 PAID	Overdue
Total rentals: 1						

2. Refer [All Rental](#) section on how to create new rentals and make payments.

## Complete

This section displays the list of rentals that are with status Complete.

1. Go to **Rental > Complete**. The following page is displayed.

Rentals		<a href="#">Create Rental</a>				
	Pre-Rental					
Payment Pending	7					
Booked	0					
In Progress		1				
Overdue		1				
Complete		2				
ID	Kit	Customer	Pickup Date	Return Date	To Pay	Status
467	Mares BCD Small	Test McTester	20 Jan, 2015	20 Jan, 2015		Complete
463	Mares BCD Small	Test McTester	18 Jan, 2015	18 Jan, 2015		Complete
Total rentals: 2						

2. Refer [All Rental](#) section on how to create new rentals and make payments.

## Rental Products

This section displays the list of inventory items that are available for rent. It also displays the number of units available and number of units on rent.

### Creating a New Rental Inventory Item

1. Go to **Rental > Rental Products**. The following page is displayed.

Rental Inventory		<a href="#">Export Rental Product Data</a>	<a href="#">New Rental Inventory Item</a>				
	Available Rental Inventory	10					
Available Rental Inventory			Inventory Items Currently On Rent	0			
			Archived Rental Inventory				
ID	Item Name	SKU #	Brand	Category	Price per day	Total Inventory	Available
24324	Mares BCD Small New	MARES-BCD-SM-imp	Mares	BCDs	£10.00	5	5
22617	Mares BCD Small	MARES-BCD-SM	Mares	BCDs	£10.00	5	5
Total Inventory 2							

2. Click **New Rental Inventory Item**. The following page is displayed.

Add Rental Inventory Item							
<a href="#">Rental Item Details</a>		<a href="#">Photos</a>	<a href="#">Accounting &amp; Barcodes</a>	<a href="#">Pricing</a>			
<b>Product Name &amp; SKU</b> Enter the full name for this product and its stock keeping unit.		<b>* Name</b> <input type="text"/>	<b>* SKU</b> <input type="text"/>	<b>* Current Stock Level</b> <input type="text"/>			
<b>Description</b> <small>The description will be shown on email and printed receipts.</small>		<b>Description</b> <input type="text"/>					
<b>Product Information</b> <small>Enter the brand, category and supplier for this product.</small>		<b>* Brand</b> <input type="text"/> Mares <a href="#">Add new</a>	<b>* Category</b> <input type="text"/> Masks <a href="#">Add new</a>	<b>* Supplier</b> <input type="text"/> Dive Supplies <a href="#">Add new</a>			
<input checked="" type="checkbox"/> <a href="#">Save</a>							

3. Rental Item Details

- **Product Name & SKU**
  - i. Enter the name of the product in stock in the **Name** field.
  - ii. Enter the total number of units in stock in the **SKU** field.
  - iii. Enter the current stock level in the **Current Stock Level** field.

- Description
  - i. Enter the description of the inventory item in the **Description** field.
- Product Information
  - i. Select the required brand from the Brand dropdown list. Click [Add new brand](#) link to create a new brand.
  - ii. Select the category from the Category dropdown list. Click [Add new category](#) link to create a new category.
  - iii. Select the supplier from the Supplier dropdown list. Click [Add new supplier](#) link to create a new supplier.

#### 4. Photos

- Product Image
  - i. Click Select file in the **Upload File** field to upload an image to the product.
- Accounting & Barcodes
  - i. Enter the accounting code of the product in the **Accounting Code** field.
  - ii. Enter the supplier code of the product in the **Supplier code** field.
- Barcode
  - i. Enter the barcode of the product in the **Barcode** field.

#### 5. Pricing

- Pricing
  - i. Enter the rate of the item per day in the **Price per day** field.
- Tax & Commissions
  - i. Select the tax for the product from the **Tax rate** dropdown list.
  - ii. Select the rate of commission from the **Commission rate** dropdown list.

#### 6. Click **Save**.

### Modifying the Rental Inventory Details

#### 1. Go to **Rental > Rental Products**. The following page is displayed.

Rental Inventory								 Export Rental Product Data	 New Rental Inventory Item
 Available Rental Inventory			 Inventory Items Currently On Rent						
Available Rental Inventory			Inventory Items Currently On Rent					0	
Archived Rental Inventory									
ID ▼	Item Name	SKU #	Brand	Category	Price per day	Total Inventory	Available		
24324	Mares BCD Small New	MARES-BCD-SM-imp	Mares	BCDs	£10.00	5	5		
22617	Mares BCD Small	MARES-BCD-SM	Mares	BCDs	£10.00	5	5		
Total Inventory 2									

#### 2. Click the ID of the rental inventory item to be modified. The following page is displayed.

## User Manual

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Rental Product | Mares BCD Small New

Mares BCD Small New							
Brand Mares Category BCDs Supplier Dive Supplies	<a href="#">Edit Rental Product</a> <a href="#">Archive Rental Product</a>						
							
<a href="#">Inventory Information</a>							
<b>Inventory Information</b> <table border="1"> <tr> <td>Price Per Day</td> <td>£10.00</td> </tr> <tr> <td>Current Inventory Level</td> <td>5</td> </tr> </table>		Price Per Day	£10.00	Current Inventory Level	5		
Price Per Day	£10.00						
Current Inventory Level	5						
<a href="#">Rental Product Information</a>							
<b>Rental Product Information</b> <table border="1"> <tr> <td>Commission Rate</td> <td>0.0%</td> </tr> <tr> <td>Tax Rate</td> <td>10.0%</td> </tr> <tr> <td>SKU</td> <td>MARES-BCD-SM-imp</td> </tr> </table>		Commission Rate	0.0%	Tax Rate	10.0%	SKU	MARES-BCD-SM-imp
Commission Rate	0.0%						
Tax Rate	10.0%						
SKU	MARES-BCD-SM-imp						
<a href="#">Delete Rental Product</a>							

3. Click **Edit Rental Product**. The following page is displayed.

Mares BCD Small New

<a href="#">Rental Item Details</a>	<a href="#">Photos</a>	<a href="#">Accounting &amp; Barcodes</a>	<a href="#">Pricing</a>
<b>Product Name &amp; SKU</b> Enter the full name for this product and its stock keeping unit.	* Name Mares BCD Small New	* SKU MARES-BCD-SM-imp	* Current Stock Level 5
<b>Description</b> The description will be shown on email and printed receipts.	Description		
<b>Product Information</b> Enter the brand, category and supplier for this product.	* Brand Mares	* Category BCDs	* Supplier Dive Supplies
	Add new brand	Add new category	Add new supplier
<a href="#">Save</a>			

4. Modify the required details and click **Save**.

### Deleting the Inventory Rental

1. Go to **Rental > Rental Products**. The following page is displayed.

Rental Inventory

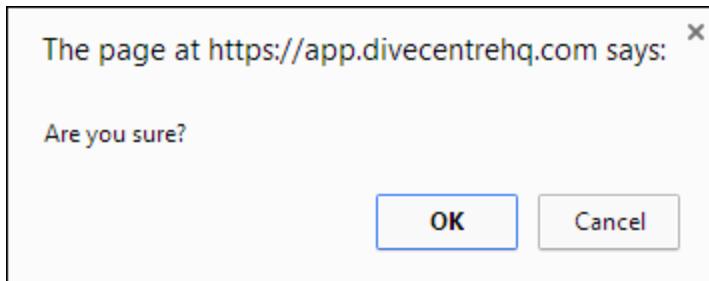
<a href="#">Available Rental Inventory</a>		<a href="#">Inventory Items Currently On Rent</a>		<a href="#">New Rental Inventory Item</a>			
Available Rental Inventory	10	Inventory Items Currently On Rent	0				
<a href="#">Rental Inventory</a>				Archived Rental Inventory			
ID	Item Name	SKU #	Brand	Category	Price per day	Total Inventory	Available
24324	Mares BCD Small New	MARES-BCD-SM-imp	Mares	BCDs	£10.00	5	5
22617	Mares BCD Small	MARES-BCD-SM	Mares	BCDs	£10.00	5	5
Total Inventory 2							

2. Click the ID of the rental inventory item to be modified. The following page is displayed.

Rental Product | Mares BCD Small New

Mares BCD Small New							
	Brand: Mares Category: BCDs Supplier: Dive Supplies						
<input type="button" value="Edit Rental Product"/> <input type="button" value="Archive Rental Product"/>							
<b>Inventory Information</b> <table border="1"> <tr> <td>Price Per Day</td> <td>£10.00</td> </tr> <tr> <td>Current Inventory Level</td> <td>5</td> </tr> </table>		Price Per Day	£10.00	Current Inventory Level	5		
Price Per Day	£10.00						
Current Inventory Level	5						
<b>Rental Product Information</b> <table border="1"> <tr> <td>Commission Rate</td> <td>0.0%</td> </tr> <tr> <td>Tax Rate</td> <td>10.0%</td> </tr> <tr> <td>SKU</td> <td>MARES-BCD-SM-imp</td> </tr> </table>		Commission Rate	0.0%	Tax Rate	10.0%	SKU	MARES-BCD-SM-imp
Commission Rate	0.0%						
Tax Rate	10.0%						
SKU	MARES-BCD-SM-imp						
<input type="button" value="Delete Rental Product"/>							

3. Click **Delete Rental Product**. The following popup is displayed.



4. Click **OK** to delete.

### Archiving the Rental Inventory

1. Go to **Rental > Rental Products**. The following page is displayed.

Rental Inventory

Available Rental Inventory		Inventory Items Currently On Rent		Archived Rental Inventory			
Available Rental Inventory	10	Inventory Items Currently On Rent	0				
<b>Rental Inventory</b>							
ID	Item Name	SKU #	Brand	Category	Price per day	Total Inventory	Available
24324	Mares BCD Small New	MARES-BCD-SM-imp	Mares	BCDs	£10.00	5	5
22617	Mares BCD Small	MARES-BCD-SM	Mares	BCDs	£10.00	5	5
Total Inventory 2							

2. Click the ID of the rental inventory item to be modified. The following page is displayed.

Rental Product | Mares BCD Small New

Mares BCD Small New							
	Brand: Mares Category: BCDs Supplier: Dive Supplies						
<input type="button" value="Edit Rental Product"/> <input type="button" value="Archive Rental Product"/>							
<b>Inventory Information</b> <table border="1"> <tr> <td>Price Per Day</td> <td>£10.00</td> </tr> <tr> <td>Current Inventory Level</td> <td>5</td> </tr> </table>		Price Per Day	£10.00	Current Inventory Level	5		
Price Per Day	£10.00						
Current Inventory Level	5						
<b>Rental Product Information</b> <table border="1"> <tr> <td>Commission Rate</td> <td>0.0%</td> </tr> <tr> <td>Tax Rate</td> <td>10.0%</td> </tr> <tr> <td>SKU</td> <td>MARES-BCD-SM-imp</td> </tr> </table>		Commission Rate	0.0%	Tax Rate	10.0%	SKU	MARES-BCD-SM-imp
Commission Rate	0.0%						
Tax Rate	10.0%						
SKU	MARES-BCD-SM-imp						
<input type="button" value="Delete Rental Product"/>							

### 3. Click **Archive Rental Product**.

#### Unarchiving the Rental Product

1. Go to **Rental > Rental Products**. The following page is displayed.

Rental Inventory

Available Rental Inventory		Inventory Items Currently On Rent		Archived Rental Inventory			
	Available Rental Inventory		Inventory Items Currently On Rent		Total Inventory	Available	
	10		0				
<b>Rental Inventory</b>							
ID	Item Name	SKU #	Brand	Category	Price per day	Total Inventory	Available
24324	Mares BCD Small New	MARES-BCD-SM-Imp	Mares	BCDs	£10.00	5	5
22817	Mares BCD Small	MARES-BCD-SM	Mares	BCDs	£10.00	5	5
Total Inventory 2							

2. Click Archived Rental Inventory link. The following page is displayed.

Rental Inventory

Available Rental Inventory		Inventory Items Currently On Rent		Rental Inventory			
	Available Rental Inventory		Inventory Items Currently On Rent		Total Inventory	Available	
	10		0				
<b>Archived</b>							
ID	Item Name	SKU #	Brand	Category	Price per day	Total Inventory	Available
24324	Mares BCD Small New	MARES-BCD-SM-Imp	Mares	BCDs	£10.00	5	0
Total Inventory 1							

3. Click the ID of the rental inventory item to be unarchived. The following page is displayed.

Rental Product | Mares BCD Small New

Mares BCD Small New							
	Brand: Mares Category: BCDs Supplier: Dive Supplies						
<input type="button" value="Edit Rental Product"/> <input type="button" value="Unarchive Rental Product"/>							
<b>Inventory Information</b> <table border="1"> <tr> <td>Price Per Day</td> <td>£10.00</td> </tr> <tr> <td>Current Inventory Level</td> <td>5</td> </tr> </table>		Price Per Day	£10.00	Current Inventory Level	5		
Price Per Day	£10.00						
Current Inventory Level	5						
<b>Rental Product Information</b> <table border="1"> <tr> <td>Commission Rate</td> <td>0.0%</td> </tr> <tr> <td>Tax Rate</td> <td>10.0%</td> </tr> <tr> <td>SKU</td> <td>MARES-BCD-SM-imp</td> </tr> </table>		Commission Rate	0.0%	Tax Rate	10.0%	SKU	MARES-BCD-SM-imp
Commission Rate	0.0%						
Tax Rate	10.0%						
SKU	MARES-BCD-SM-imp						
<input type="button" value="Delete Rental Product"/>							

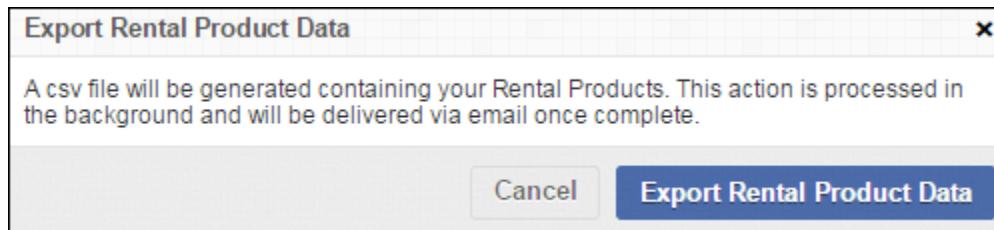
4. Click **Unarchive Rental Product**.
-

## Exporting Rental Product Data

1. Go to **Rental > Rental Products**. The following page is displayed.

Rental Inventory							
Available Rental Inventory				Inventory Items Currently On Rent			
Total Inventory 10				0			
Archived Rental Inventory							
ID ▾	Item Name	SKU #	Brand	Category	Price per day	Total Inventory	Available
24324	Mares BCD Small New	MARES-BCD-SM-imp	Mares	BCDs	£10.00	5	5
22617	Mares BCD Small	MARES-BCD-SM	Mares	BCDs	£10.00	5	5
Total Inventory 2							

2. Click **Export Rental Product Data**. The following popup window is displayed.



3. Click **Export Rental Product Data**.

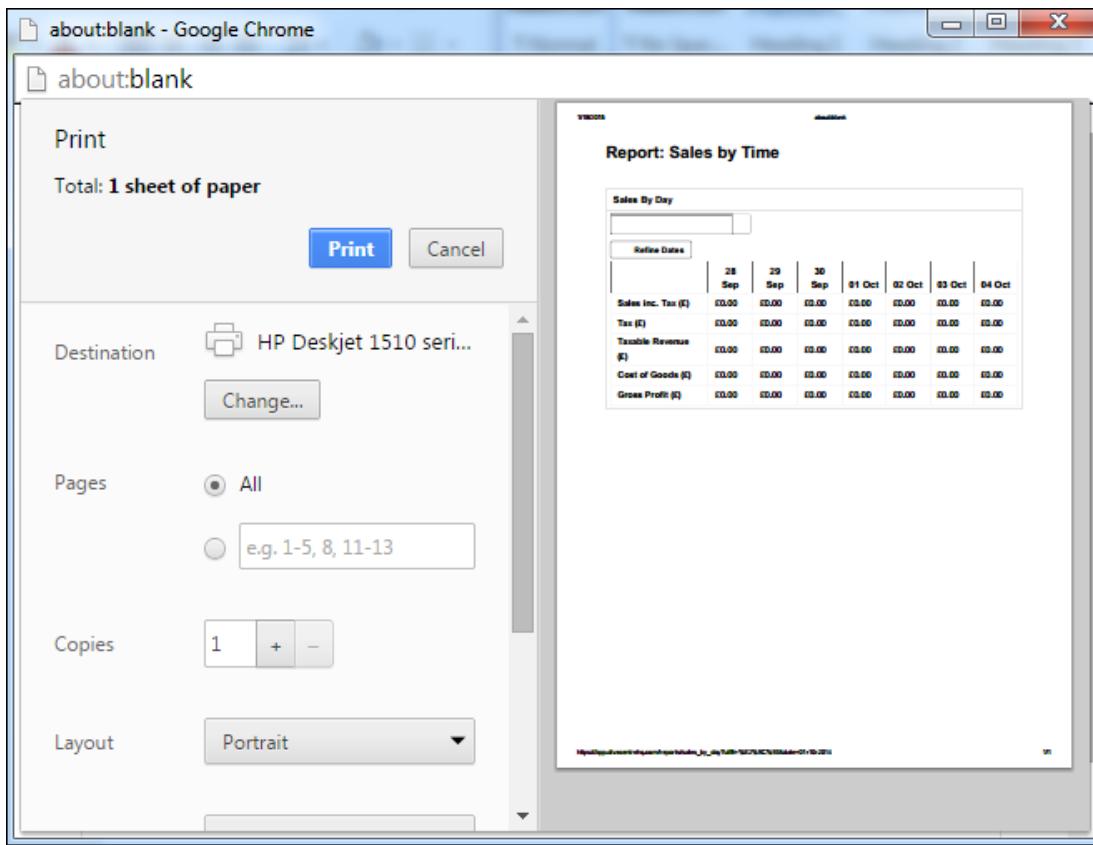
## Reports

### Sales by Day

1. Go to **Reports > Sales by Day**. The following page is displayed.

Report: Sales by Time							
Sales By Day							
	28 Sep	29 Sep	30 Sep	01 Oct	02 Oct	03 Oct	04 Oct
Sales inc. Tax (£)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tax (£)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Taxable Revenue (£)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Cost of Goods (£)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Gross Profit (£)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

2. Click the Date field to select the date from the calendar.
3. Click **Refine Dates**.
4. The report for the selected date is displayed.
5. To print the report, click **Print**. The following window is displayed.



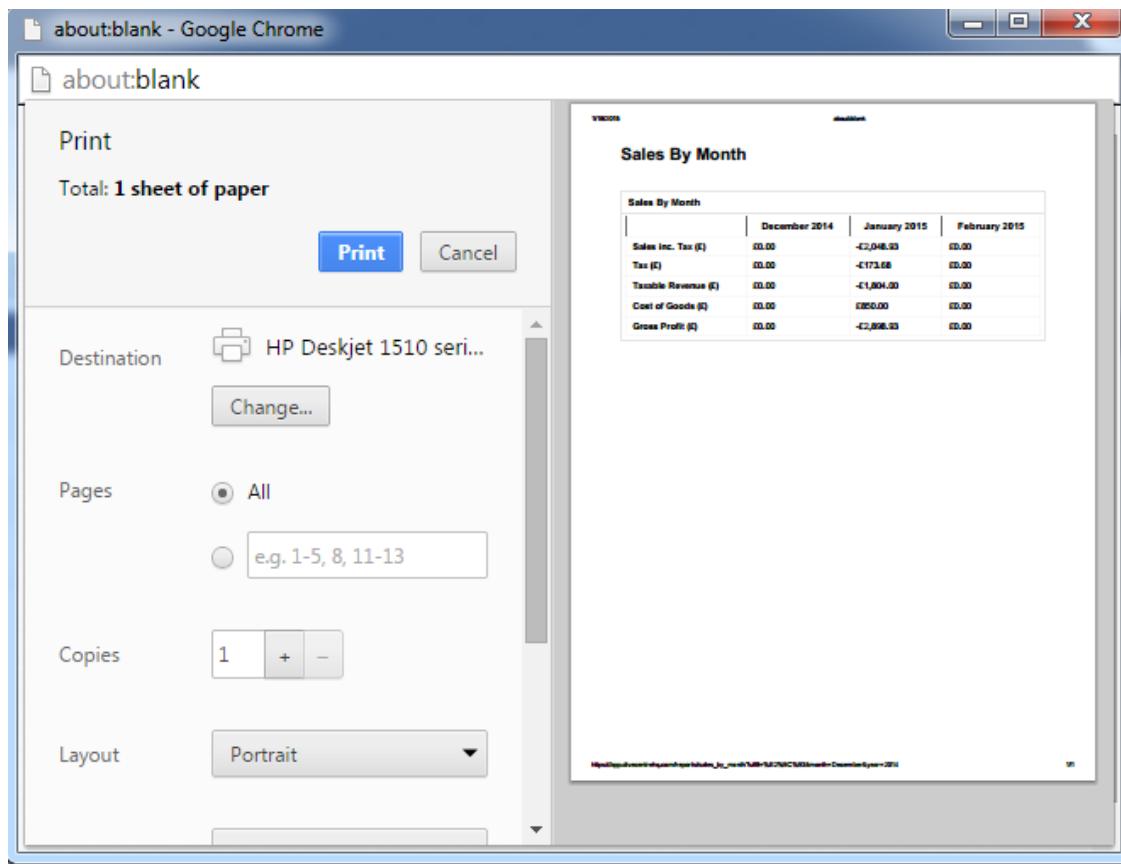
6. Select the required printer and select **Print**.

### **Sales by Month**

1. Go to **Reports > Sales by Month**. The following page is displayed.

Sales By Month			
Sales By Month			
January	2015	Refine Dates	
	January 2015	February 2015	March 2015
Sales inc. Tax (£)	-£2,048.93	£0.00	£0.00
Tax (£)	-£173.68	£0.00	£0.00
Taxable Revenue (£)	-£1,804.00	£0.00	£0.00
Cost of Goods (£)	£850.00	£0.00	£0.00
Gross Profit (£)	-£2,898.93	£0.00	£0.00

2. Select the required month from the dropdown list.  
 3. Select the required year from the dropdown list.  
 4. Click **Refine Dates**.  
 5. The report for the selected month and year is displayed.  
 6. To print the report, click **Print**. The following window is displayed.



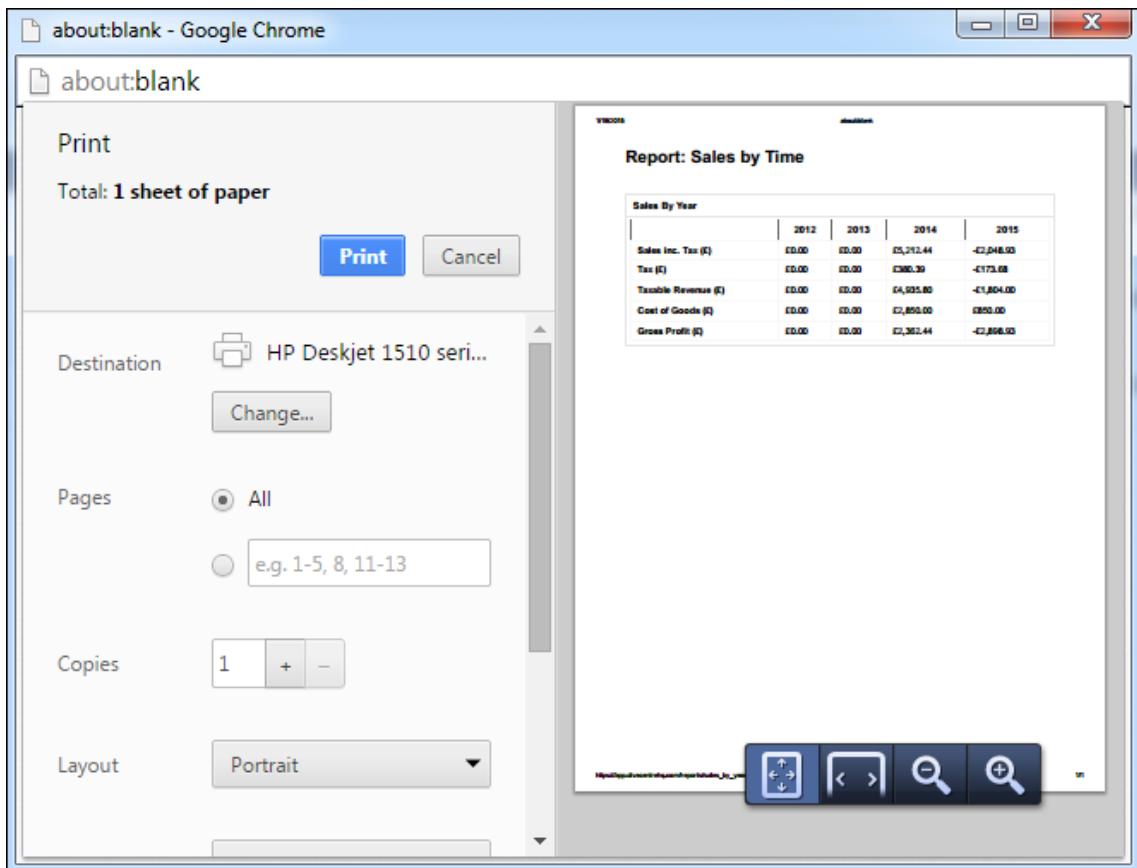
7. Select the required printer and select **Print**.

### [Sales by Year](#)

1. Go to **Reports > Sales by Year**. The following page is displayed.

Report: Sales by Time				
Sales By Year				
	2012	2013	2014	2015
Sales inc. Tax (£)	£0.00	£0.00	£5,212.44	-£2,048.93
Tax (£)	£0.00	£0.00	£380.39	-£173.68
Taxable Revenue (£)	£0.00	£0.00	£4,935.80	-£1,804.00
Cost of Goods (£)	£0.00	£0.00	£2,850.00	£850.00
Gross Profit (£)	£0.00	£0.00	£2,362.44	-£2,898.93

2. To print the report, click **Print**. The following window is displayed.



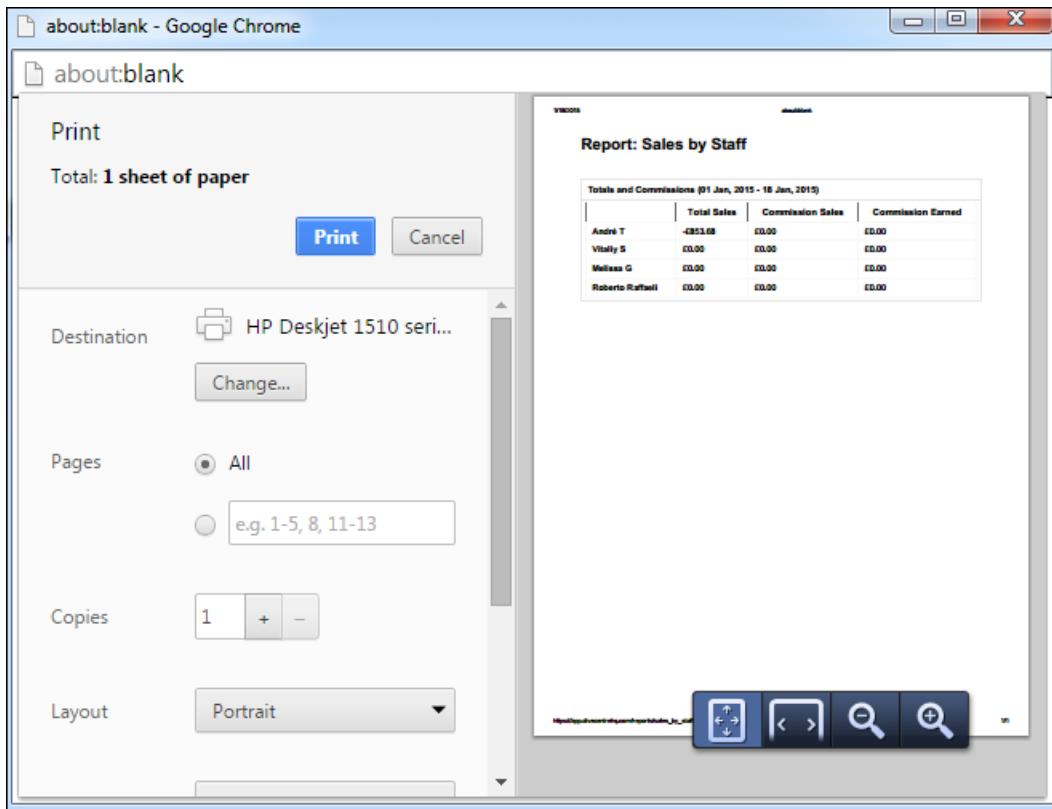
3. Select the required printer and select **Print**.

### Sales by Staff

1. Go to **Reports > Sales by Staff**. The following page is displayed.

Report: Sales by Staff			
Totals and Commissions (01 Jan, 2015 - 18 Jan, 2015)			
	Total Sales	Commission Sales	Commission Earned
André T	£853.68	£0.00	£0.00
Vitaliy S	£0.00	£0.00	£0.00
Melissa G	£0.00	£0.00	£0.00
Roberto Raffaeli	£0.00	£0.00	£0.00

2. Click the **From Date** field to select the from date from the calendar.  
 3. Click the **To Date** field to select the to date from the calendar.  
 4. Click **Refine Dates**.  
 5. The report for the selected duration for all the staff is displayed.  
 6. To print the report, click **Print**. The following window is displayed.



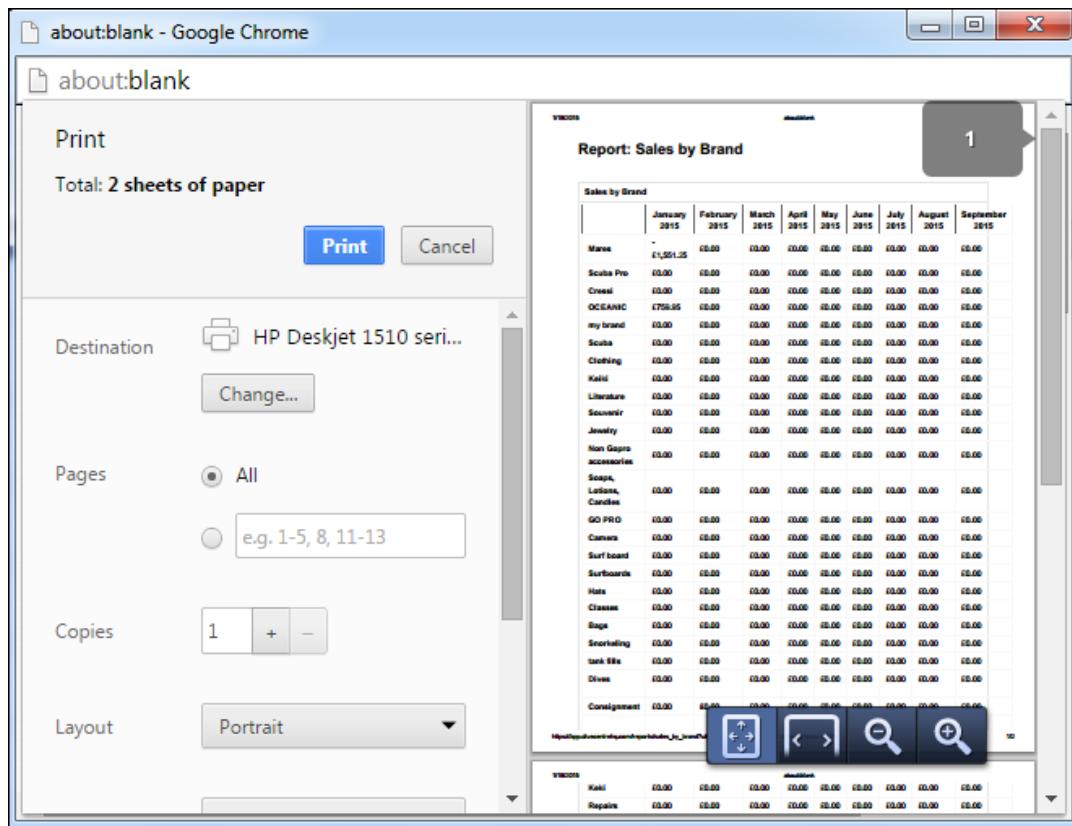
7. Select the required printer and select **Print**.

### Sales by Brand

1. Go to **Reports > Sales by Brand**. The following page is displayed.

Report: Sales by Brand									
Sales by Brand									
	January	February	March	April	May	June	July	August	September
Mares	-£1,551.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Scuba Pro	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Cressi	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
OCEANIC	£759.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
my brand	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Scuba	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Clothing	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Keiki	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Literature	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Souvenir	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

2. Select the required month from the dropdown list.  
 3. Select the required year from the dropdown list.  
 4. Click **Refine Dates**.  
 5. The report for the selected month and year for the brands are displayed.  
 6. To print the report, click **Print**. The following window is displayed.



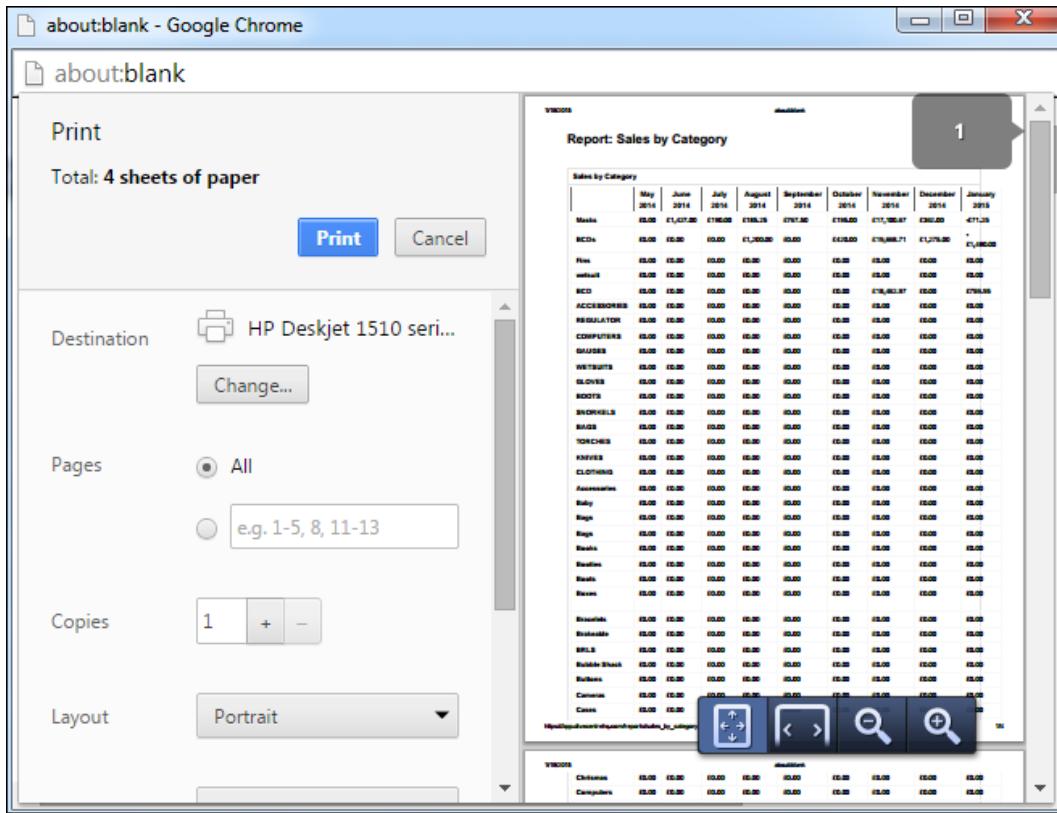
7. Select the required printer and select **Print**.

### Sales by Category

1. Go to **Reports > Sales by Category**. The following page is displayed.

Report: Sales by Category										 Print		
Sales by Category												
	May	2014	Refine Dates	May 2014	June 2014	July 2014	August 2014	September 2014	October 2014	November 2014	December 2014	January 2015
Masks	£0.00	£1,427.00	£190.00	£185.25	£767.50	£195.00	£17,100.67	£362.00	-£71.25			
BCDs	£0.00	£0.00	£0.00	£1,200.00	£0.00	£420.00	£19,668.71	£1,275.00	-£1,480.00			
Fins	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
wetsuit	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
BCD	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£18,462.97	£0.00	£0.00	£0.00	£0.00	£759.95
ACCESSORIES	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
REGULATOR	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
COMPUTERS	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
GAUGES	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
WETSUITS	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

2. Select the required month from the dropdown list.  
 3. Select the required year from the dropdown list.  
 4. Click **Refine Dates**.  
 5. The report for the selected month and year for the categories are displayed.  
 6. To print the report, click **Print**. The following window is displayed.



7. Select the required printer and select **Print**.

### Sales by Product

1. Go to **Reports > Sales by Product**. The following page is displayed.

Report: Sales by Product										
<input type="button" value="Print"/> <input type="button" value="Refine Dates"/>										
	May	June	July	August	September	October	November	December	January	2015
Dragon BCD [XS]	£0.00	£0.00	£0.00	£400.00	£0.00	£320.00	£1,560.00	£0.00	-£1,480.00	
abc	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£221.25	£0.00	-£71.25	
EXCURSION 2 BC Medium	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
EXCURSION 2 BC XX-large 60lb bladder	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
EXCURSION 2 BC Large 60lb bladder	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
EXCURSION 2 BC Small	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Tax Test	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
EXCURSION 2 BC X-large 60lb bladder	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

1 2 3 4 Next »

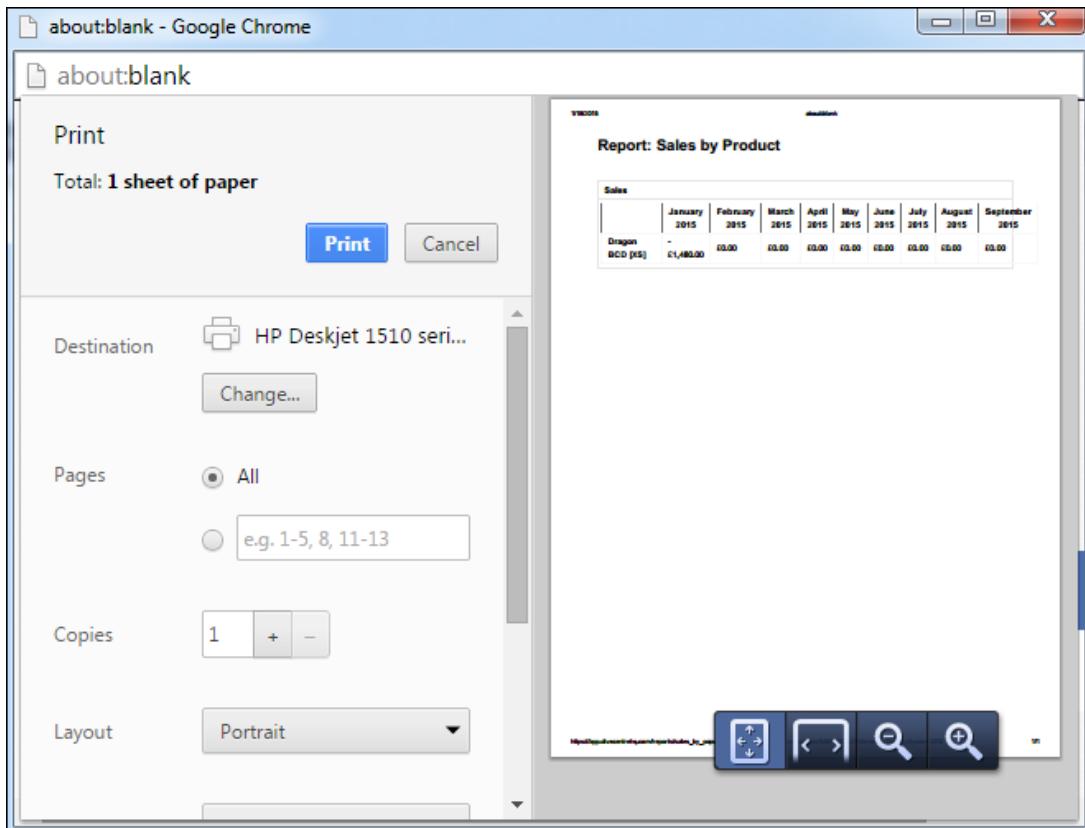
2. Click the product field to select the required product from the dropdown list.

**Note:** You can select more than one product simultaneously to generate a report.

3. Select the required month from the dropdown list.

4. Select the required year from the dropdown list.

5. Click **Refine Dates**.
6. The report for the product for the selected month and year are displayed.
7. To print the report, click **Print**. The following window is displayed.



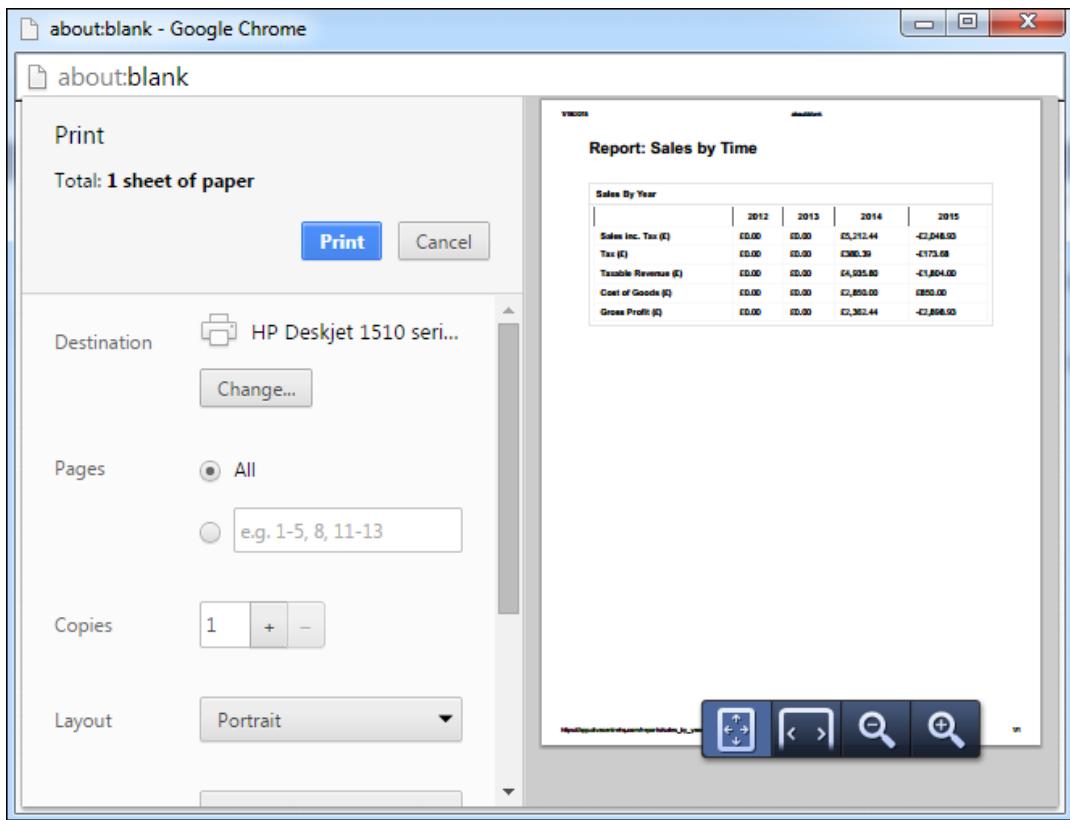
8. Select the required printer and select **Print**.

## Event Sales

1. Go to **Reports > Events**. The following page is displayed.

Report: Event Sales										
Event Sales										
	May	2014	June 2014	July 2014	August 2014	September 2014	October 2014	November 2014	December 2014	January 2015
Dive Courses (£)	£0.00	£119.84	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	-£208.32
Dive Trips (£)	£0.00	£214.50	£0.00	£29.50	£0.00	£110.00	£0.00	£0.00	£0.00	-£90.00
Totals (£)	£0.00	£334.34	£0.00	£29.50	£0.00	£110.00	£0.00	£0.00	£0.00	-£298.32

2. Select the required month from the dropdown list.
3. Select the required year from the dropdown list.
4. Click **Refine Dates**.
5. The report for selected month and year is displayed.
6. To print the report, click **Print**. The following window is displayed.



7. Select the required printer and select **Print**.

### Finance Reports

1. Go to **Reports > Finance Reports**. The following page is displayed.



2. Select the required month from the dropdown list.
3. Select the required year from the dropdown list.
4. Click **Refine Dates**.
5. The report for the selected month and year is displayed.

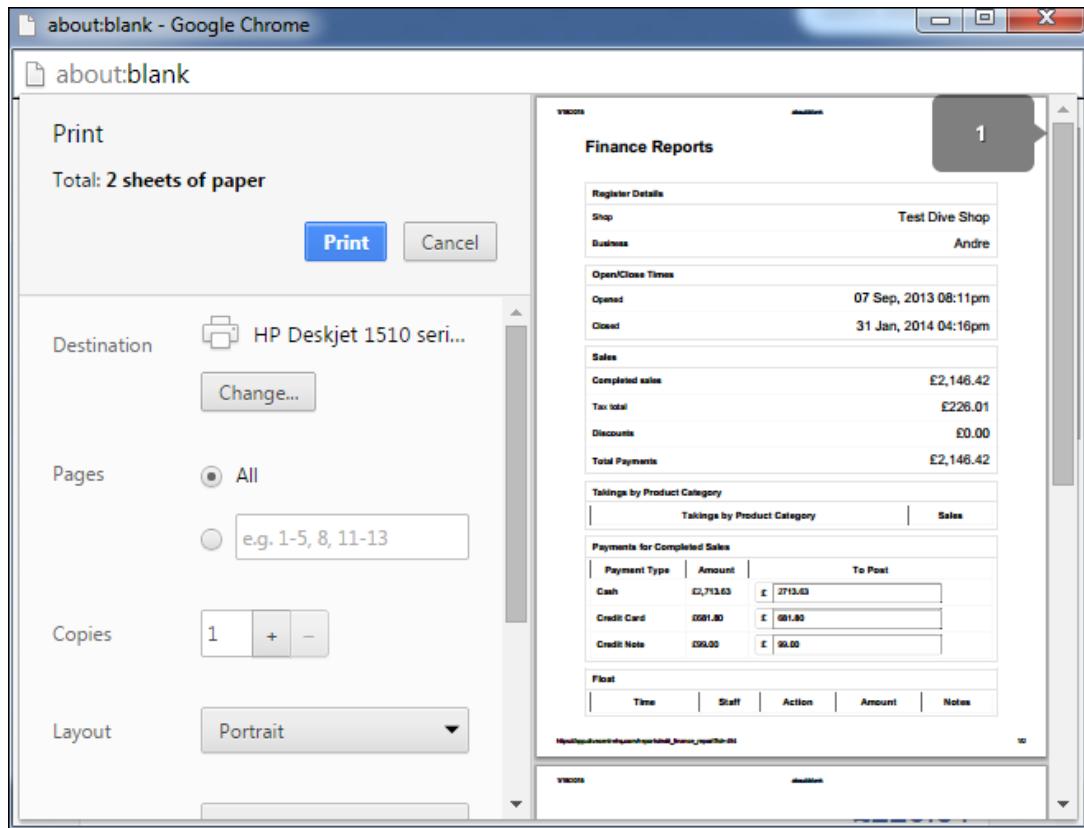


6. You can click the required sale report link to view the details as shown.

Finance Reports

Register Details		Open/Close Times		
Shop	Test Dive Shop	Opened	07 Sep, 2013 08:11pm	
Business	Andre	Closed	31 Jan, 2014 04:16pm	
<b>Sales</b>				
Completed sales			£2,146.42	
Tax total			£226.01	
Discounts			£0.00	
Total Payments			£2,146.42	
<b>Takings by Product Category</b>				
Takings by Product Category				
Sales				
<b>Payments for Completed Sales</b>				
<b>Payment Type</b>	<b>Amount</b>	<b>To Post</b>		
Cash	£2,713.03	£ 2713.03		
Credit Card	£681.80	£ 681.80		
Credit Note	£99.00	£ 99.00		
<b>Float</b>				
Time	Staff	Action	Amount	Notes
<input checked="" type="checkbox"/> Save Totals				

7. Click **Print** to print the report. The following window is displayed.



8. Select the required printer and select **Print**.