

# SERVICES AND TEMPLATES

Load the Quick Start tutorial data and **Go > Home > Setting Details > Services Provided >**

You will see a list of services that our example setting provides.

Name	Unit Price	Alt. Price	Start Time	Duration	Free Entitlement	Sibling Disc.	Manager's Disc.	Max Participants	Hidden
Breakfast Club	£4.00	£4.00	08:00	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>
Free Entitlement	£3.50	£3.50	09:00	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>
Late Lunch	£2.00	£2.00	12:30	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>
Lunch	£2.00	£2.00	12:00	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>
Nursery Afternoon	£12.00	£12.00	12:00	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>
Nursery Day	£24.00	£24.00	09:00	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>
Nursery Morning	£12.00	£12.00	09:00	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>
Pre-School Hourly	£3.50	£3.50	12:00	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>
Sun Hat	£5.00	£5.00	00:00	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>

There are **three types for service** that we can provide for the children and it is important to understand them:

- A. Normal paid attendances.
- B. Free Entitlement attendances.
- C. Sundry items (like Lunches or Sun Hats).

The dialog box shows the following details for the 'Nursery Morning' service:

- Service name: Nursery Morning
- Unit price: £ 12
- Alternate price: £ 12
- Usual start time (Optional): 09:00
- Duration (Where applicable): 3 hrs
- Maximum Participants (Optional): 0 (set to 0 if not used)
- Charging options:  Use,  Free entitlement,  Sibling discounts,  Manager's discounts
- Service Visibility:  Hide Service

## A) Normal Paid Attendances

Click on the 'Nursery Morning' service and click the 'Edit' button at the bottom of the screen. This is a service where the family pays for the child to attend. This service has:

**Name**  
(ideally short and unique in the early characters)

**Unit price**

**Usual start time** (this can be changed at any time as the booking is made.)

**Duration** (e.g. 3.5 hours, an hourly service would have duration 1 hour)

It is not a Free Entitlement and we are not discounting it

The alternate price can be ignored, it is a disused discounting method.

You can set a maximum number of simultaneous participants for a service - e.g. for an optional coached activity at an after school club.

Click **'Cancel'** to leave the pop-up.

## B) Free Entitlement Attendances

Click on the 'Free Entitlement' service and click the 'Edit' button at the bottom of the screen. This is a Free Entitlement attendance.

Service name: Free Entitlement

Service Details

Unit price: £ 3.5

Alternate price: £ 3.5

Usual start time (Optional): 09:00

Duration (Where applicable): 1 hrs

Maximum Participants (Optional): 0  
(set to 0 if not used)

Charging options (instead of Alternate Price)

Free entitlement

Use  Sibling discounts:  Manager's discounts:

Service Visibility

Hide Service

OK Cancel Help

The name should mention the Free Entitlement, it will appear on invoices

If you know the reimbursement value use it for the unit price. If not, leave it as zero.

The usual start time. (Can be changed at any time as the booking is made.)

A duration (this service is hourly, so the unit duration is 1 hour.)

**\* IMPORTANT \*** Free Entitlement is selected  
(This means that it is always presented as zero price on invoices, and it is sent to Free Entitlement returns.)

As it is a Free Entitlement we cannot discount the service.

Click '**Cancel**' to leave the pop-up.

## C) Sundry Items - Like Lunches

Click on the 'Lunch' service and click the 'Edit' button at the bottom of the screen.

The difference from a paid attendance is that Lunch has a start time but no duration.

### **\* IMPORTANT \***

Services with a price (and all Free Entitlements) will appear on invoices.

Services with a duration will appear on normal printed register pages.

Services with no duration will only appear on Sundry Items registers. (Like children having lunch, etc.)

Click '**Cancel**' to leave the pop-up.

Service name: Lunch

Service Details

Unit price: £ 2

Alternate price: £ 2

Usual start time (Optional): 12:00

Duration (Where applicable): 0 hrs

Maximum Participants (Optional): 0  
(set to 0 if not used)

Charging options (instead of Alternate Price)

Free entitlement

Use  Sibling discounts:  Manager's discounts:

Service Visibility

Hide Service

OK Cancel Help

## Discounts

If you intend to use discounts with your bookings please read the **Discounts** mini guide to understand the discounts available and the way in which they are applied.

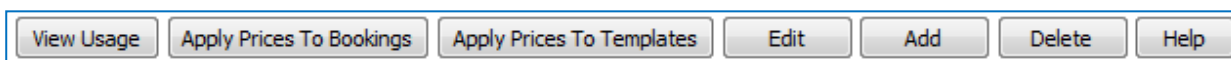
## Alternate Price

The initial purpose of the alternate service price was for use as a manual discounting method, it is now obsolete but some people still use it. It can be used as a means of making bookings either side of a price transition.

## Changing Services

If you change your service prices, durations or free entitlement status the change will not affect bookings already entered into the system. If you put your service prices up this year you can edit the services do so without affecting last year's bookings.

The buttons at the bottom of the tab allow you to add and manage services and to see which templates use the services.

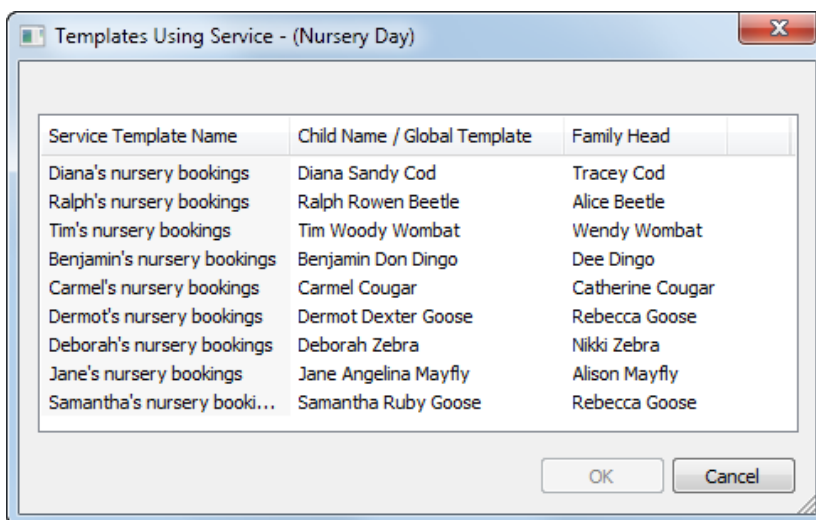


### THE BUTTONS ARE:

- Add** Adds a new service to the list.
- Edit** Edits the currently selected service. (Double clicking the service will open the editor too.)
- Delete** Deletes unused services. Services in use cannot be deleted, but they can be hidden.

### View Usage Button

This shows a list of the templates that use the selected service.



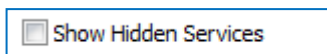
Service Template Name	Child Name / Global Template	Family Head
Diana's nursery bookings	Diana Sandy Cod	Tracey Cod
Ralph's nursery bookings	Ralph Rowen Beetle	Alice Beetle
Tim's nursery bookings	Tim Woody Wombat	Wendy Wombat
Benjamin's nursery bookings	Benjamin Don Dingo	Dee Dingo
Carmel's nursery bookings	Carmel Cougar	Catherine Cougar
Dermot's nursery bookings	Dermot Dexter Goose	Rebecca Goose
Deborah's nursery bookings	Deborah Zebra	Nikki Zebra
Jane's nursery bookings	Jane Angelina Mayfly	Alison Mayfly
Samantha's nursery booki...	Samantha Ruby Goose	Rebecca Goose

### Apply Prices to Templates

You can use this button to update the templates with the currently selected service details. The start time and duration will not be changed as they could cause booking conflicts if changed automatically.

### Apply Prices to Bookings

You can use this button to update the un-invoiced bookings with the currently selected service prices. The start time and duration will not be changed as they could cause booking conflicts if changed automatically. You will need to supply the first date to apply the revised prices and all subsequent un-invoiced bookings will be updated too.



### Hidden Services

If a service has been used it can be edited and marked as hidden to remove it from view if you no longer need it. Hide might also be useful for seasonal services that you only need to see at certain times of year. Tick 'Show Hidden Services' to bring hidden services back into view.

## Tip! Sundry Items

You can use Sundry Items to book lunches or snacks for the children, they will appear on invoices and you can list them on sundry register pages for any day. If the sundry item is time dependant (e.g. lunch, snacks, mini-bus) remember to enter the time as it will make it easier to filter the sundry register pages. If there is no relevant time (e.g. sun hats) just leave the start time as midnight.

Sundry items are intended for items provided for children, and not for charges made against adults (e.g. late payment fines or opening balances). There is a separate means of making account holder charges and credits.

## Tip! Service Names

SuperFox uses predictive typing for many of the data entry forms so try to keep service names short and ideally unique in the earlier characters.

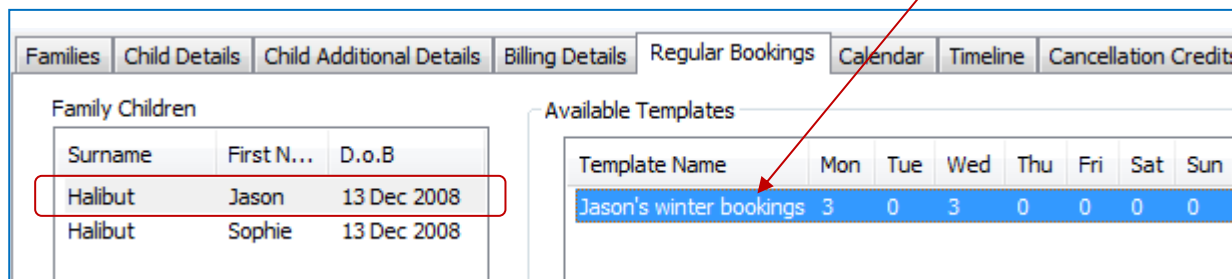
## Making Templates For Regular Bookings

If your children have regular booking patterns, either as a group or individually, we can put together service templates to speed up the booking process.

A template is simply a list of the child's bookings for each day of the week. Here is an example.

**Go > Home > Family Details > Family Centre > click on the Halibut family >**

**go to the Regular Bookings tab > click on Jason Halibut > click on Jason's winter bookings template >**



Template Name	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Jason's winter bookings	3	0	3	0	0	0	0

You can see immediately that this template only has regular bookings on Mondays and Wednesdays.

- Free Entitlement from 9am to 2pm.
- Followed by an hour of normal paid-for pre-school until 3pm.
- The day also includes Late Lunch at 12:30 as a Sundry Item (it has no duration).

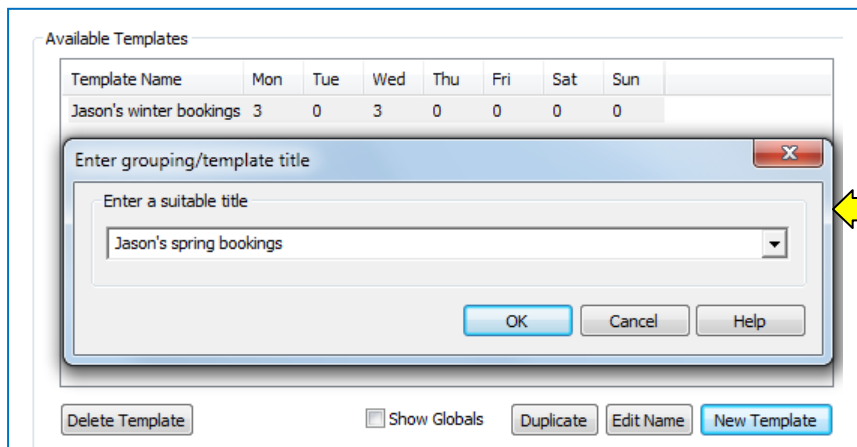
Monday (3)	Tuesday (0)	Wednesday (3)	Thursday (0)	Friday (0)	Saturday (0)	Sunday (0)
Service	Free Entitlement	Alternate Price	Units	Start	Hours	
Free Entitlement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5.00	09:00	5.00	
Late Lunch	<input type="checkbox"/>	<input type="checkbox"/>	1.00	12:30	0.00	
Pre-School Hourly	<input type="checkbox"/>	<input type="checkbox"/>	1.00	14:00	1.00	

## Tip! Click On Column Headers To Sort Lists

Many of the lists shown in SuperFox can be sorted into a different order by clicking on the column headers. Try it!

## Making a New Template - Example

Making or editing a template is very simple. While we are here let's make a second template for Jason.

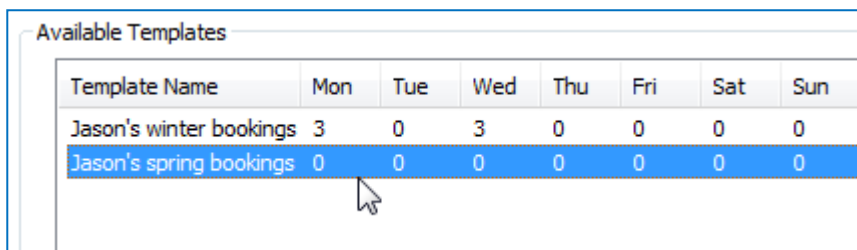


Click on the New Template button and give the new template the title

**'Jason's spring bookings'**

and click OK. The new template will be added to the list of available templates

If you make a new template in the Booking Centre you will need to choose the template owner at this point.



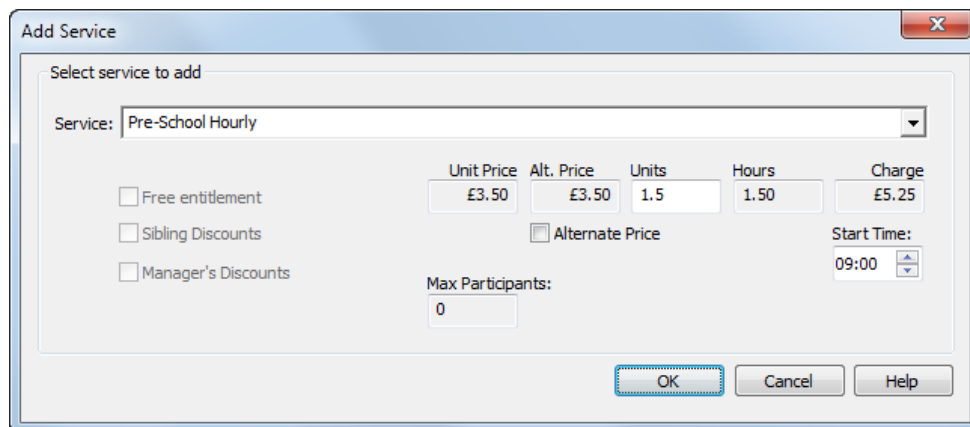
Now click on the new 'Jason's spring bookings' template in the list of available templates to start adding services to the template.

There are two ways to add services to the template:

- To add services to a single day choose the tab for the day and click the **'Add Item To Day'** button.
- To add services to multiple days just click on the **'Add Item To Week'** button.

**Choose the Add Item To Week button for this example.**

A pop-up form will ask you to choose the service, how many units to book and a start time. Either use the drop down list of services or begin typing the service name, SuperFox will find a match as you type.



In this example choose the Pre-School hourly service, for 1.5 units starting at 9am, and then click 'OK'.

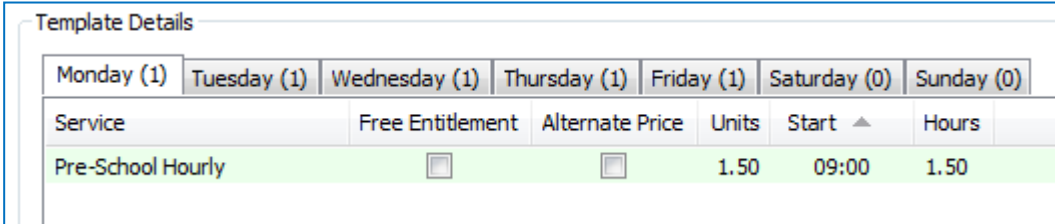
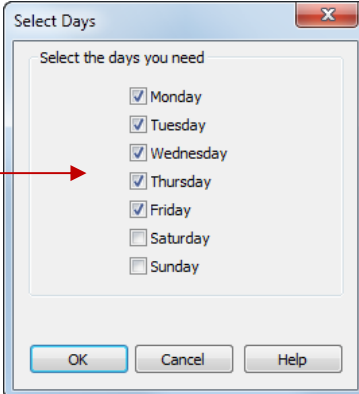
\* **IMPORTANT** \* This is an example of booking an hourly charged service. The duration of the service was set up in Services Provided as is 1 hour, and we have booked 1.5 units, i.e. 1.5 hours.

We chose the 'Add Item To Week' option so SuperFox will now ask us to choose which days to use the service.

Just tick or un-tick the days as required.

**For this example tick Monday to Friday inclusive.**

When you click OK the service will be added to the days that you ticked as shown below.



Monday (1)	Tuesday (1)	Wednesday (1)	Thursday (1)	Friday (1)	Saturday (0)	Sunday (0)
Service	Free Entitlement	Alternate Price	Units	Start	Hours	
Pre-School Hourly	<input type="checkbox"/>	<input type="checkbox"/>	1.50	09:00	1.50	

## Child Templates

The template that we just made is specific to a particular child, Jason Halibut. A child can have as many templates as needed, we choose which one to use when we make the bookings.

If your customers have individual booking patterns then child templates are very helpful.

## Global Templates

If your setting has a more standardised service where many children share the same usage pattern you may find it more useful to use Global Templates. Global Templates are set up in exactly the same way as Child Templates but they are not specific to any child.

Global templates are managed from:

**Go > Home > Setting Details > Services Provided > Service Templates tab >**

This form gives a good view of all of the Child and Global Templates. It is described in the Services mini guide.

## Service Price Changes

You do not need to edit all of your templates if you change your service prices. Click on the service that you have changed and the **Apply Prices To Templates** button on the Services Provided form will do this for you.

**Go > Home > Setting Details > Services Provided > Services tab >**

This button only updates the template prices and will not make any unwanted changes to the prices of any bookings already made. The form also has a **View Usage** button that will show you which templates use a given service.

You can also apply the currently selected service prices to **un-invoiced** bookings using the **Apply Prices To Bookings** button. You will be asked for the first date to use the new prices, all subsequent un-invoiced bookings for the selected service will also have their prices updated.)

**End**