



USER GUIDE for ADMINISTRATORS

Access via the 'Admin Panel'

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1. MAIN MENU

1.1 Flight Registry: List of all flights by date order:

- 1.1.1 Click on required flight in the '**Date**' column to view and edit flight.
- 1.1.2 '**Filter by**' option on left hand menu, allows searching via all categories.
- 1.1.3 Click on '**CSV**' to create a CSV file. A date range should be inserted.

1.2 Flight Type: To create a new flight type

- Click on '**New Flight Type**'
- Enter the flight type name
- Select from the drop down menu in which category the flight type is to appear
- Click on '**Create**'

1.3 Member List: List of all members by first name alphabetical order:

- Click on members' '**Name**' to view and edit member.
- '**Filter by**' option on left hand menu, allows searching via all categories.

The left hand Menu will also show links for:

User Logins: (Not currently used)

Membership Types: (Not currently used)

1.4 Aircraft Registry: List of all Aircraft by registration order:

- Click on '**Aircraft: Reg. No:**' to view and edit.
- '**Filter by**' option on left hand menu, allows searching via all categories.

1.5 Account Balances: List of all members' balances by surname in alphabetical order:

- '**Filter by**' option on left hand menu, allows searching via Member Name and Membership Expiry date and functionality to change the List order.
- Click on members' '**Name**' to view and edit member. Click on Update to apply changes.
- Click on '**Debit**' to generate a 'New Invoice'. Refer to 'New Invoice' section for further instructions.

- Click on **‘Credit’** to apply a payment. Refer to ‘New Credit’ section for further instructions.
- Click on **‘Transactions’** to view all monetary items.
- Click on **‘Invoice Export’**
 - Choose parameters in the ‘Filter by’ option on left hand menu for:
 - Invoice export period
 - Output type (e.g. CSV)
 - Order by (e.g. Ascending)
 - Click on **‘Go’**. A list of the Invoices to be exported will be displayed on screen.
 - Click on **‘Generate’**
- Click on **‘Statements’**
 - Choose parameters in the ‘Filter by’ option on left hand menu for:
 - Statements for: The Only option available is **‘Selected member only’**.
 - Statement period
 - Click on **‘Go’** to generate PDFs.

1.6 Voucher Providers: List of providers who are selling Vouchers for flights at the Club:

To add a provider, click on **‘New Provider’**

Fields with a ‘red line’ indicate a required field.

- Input ‘Accountancy ID’ to enable automatic data upload into Clubs’ Accounting systems
- Product Code: Needs to be a unique code
- The ‘Voucher Value’ is the amount of money the Club will receive, either direct to the Club or via the other providers e.g. BGA
- No. of flights Valid for: This is the number of flight the voucher entitles
- Product Description: Any message you wish to appear at the launch point when the specific product is selected. It can be a product description or instruction to the launch point etc.
- Use the **‘Add Code’** button to create extra products for the Provider
- Click on **‘Create’**
- Click on required provider in the ‘Name’ column to **view** and **edit** provider details.
- Click on **‘Transactions’** for a list of all Vouchers sold, including reference numbers of the Vouchers sold.
 - Click on **‘X’** and then **‘Remove’** to delete Invoice
 - Click on **‘Credit’** to apply a payment for a Voucher or Invoice (for extras):
 - Fields with a ‘red line’ indicate a required field.
 - Under ‘Apply Creditable Item’:
 - Select ‘Credit Type’ and then the associated ‘Creditable Item’ from the dropdown lists (Warning, any credit or debit type should be predefined, refer to the [‘Creditable Items’](#) Section)
 - Click on **‘Apply’**, complete the remaining information relating to the credit.
 - Click on **‘Update Credit’**
 - The **‘Credit’** facility is also available from the main ‘Voucher Providers’ screen

- ‘Filter by’ option on left hand menu, allows searching via Provider Name and to change the Order list.

1.7 Vouchers: Shows a list of all Vouchers.

- Click on the ‘Voucher No. (Code)’ to view the voucher details
 - If the voucher has not used or partly used you can remove it from the list.
 - This is also where you can put and expiry date on the voucher, after that date the voucher will be removed from the valid voucher list available in the new flight menu.
- Click on the ‘Flight’ to view or edit the flight.
- ‘Filter by’ option on left hand menu, allows searching via Voucher Number; Status (Valid, Expired or Redeemed); Product Code and to change the Order list

1.8 Recurring Transactions: Shows a list of all recurring transactions

- Click on the red ‘Invoice item’ to view and edit the Invoice
- To Create a recurring transaction go to ‘**SHORTCUTS**’ ‘**New Invoice**’

2.0 SHORTCUTS

2.1 New Member

From the Home Menu click on Shortcuts / New Member

‘Name’: Checks if a person is already a member.

- Enter first part of name, if a person is already a member, their details will be auto completed.
- For New Members click on: ‘**New**’

Create new Member:

Fields with a ‘red line’ indicate a required field.

- Login details: An auto generated email, including computer generated password, will be sent requesting the new member click on the link to confirm their email address. Admin User may choose to set a ‘Password’ as an override.
- Role: Set User level
 - Level 1: All members, view own account and Launch Point information
 - Level 2: Same as Level 1, plus the ability to enter New Flights and create Daily Flight and Aircraft Flight Time Reports.
 - Level 3: Not currently in use
 - Level 4: Not currently in use
- Activate User: Member can be activated immediately without waiting for the email link to be verified.
- Lock User: Stops access to the site

- Membership details:
 - Membership: Use the drop down table to indicate type of Membership
 - Membership Terminated: Indicates that Membership is no longer current
- Next of Kin: Useful details in case of emergency
- Click on **‘Create’**: Member will be included within the ‘Members List’

2.2 New Aircraft

From the Home Menu click on Shortcuts / New Aircraft

Aircraft category:

Fields with a ‘red line’ indicate a required field.

- Use the drop down table to indicate type of Aircraft
- Use the drop down from **‘Fee paid By’** table to choose the aircraft charging mode.
- Click on **‘Create’**: Aircraft will be included within the ‘Aircraft List’

Set up a Price List for newly created aircraft: To be used if members are to be invoiced for items relating to that aircraft.

When ‘Fee paid by’ is set to minutes

From the Home Menu click on Price Lists / Aircraft Flight Price List

- Click on **‘Edit Price List’**
 - Use drop down menu to select aircraft
 - Use drop down menu to select the chargeable item.
 - Complete charges as required
 - Input ‘Charge per minute’ for each membership category.
 - Where ‘Fee for Self Powered Launch’ is an option, input fee per launch
 - Use help under ‘?’ to assist with Paid minutes options
 - Click on **‘Update’**

When ‘Fee paid by’ is set to Tacho

From the Home Menu click on Price Lists / Aircraft Tacho Flight Price List

- Select Aircraft from the drop down menu
- Select the Chargeable item from the Drop down menu
- Complete charges as required.
- Click on **‘Update’**

2.3 New Flight

From the Home Menu click on Shortcuts / New Flight
Fields with a 'red line' indicate a required field.

This function via the Admin Section would generally be used for recording after the event flights.

Flights can be 'Created' prior to Take off, with times added later either on a '**Now**' or a specified time basis.

- 'Pilot 1', 'Pilot 2' names and 'Charge to' fields will show a list of possible pilot names after commencing typing; click on the required pilot.
- Select Aircraft from dropdown list
 - Flight Type: Choose 'Standard' or Aerobatic' from the dropdown list
 - Launch Type: Choose from the dropdown list
 - Where 'Aerotow' is chosen, complete the relevant TUG and release height.
- Click on '**Create Flight**': Flight will be included within Flight Registry

To confirm Take Off and/or Landing times after a flight has been created:

From the Home Menu click on '**Flight Registry**'

- Locate the Flight and click on the flight 'Date' to open the flight
- Add times for Take Off and/or Landing, either on a 'Now' or a specified time basis.

Click on '**Update**'

- An Invoice will be automatically generated, click on '**Edit Invoice**', to amend or add Notes to the Invoice relating to that flight.
- Click on '**Update Invoice**'

Voucher flights

- Pilot 1 name; By typing 3 letters from either the name or surname, a list of members' names will appear,

Tick the '**Voucher Flight**' box.

- Choose 'Product Code' from dropdown list
- Complete Voucher Number (either the serial number from the Voucher or the 'T' number or if left blank the system will generate a random number)
- Complete Pilot 2 details i.e. the name of the Voucher holder (this automatically generates the holder as a temporary member, for a period of one month or as required)
- Include 'Voucher Extras' (N.B. a unit is 100ft) from 'Select Item' dropdown list, click on '**Apply**'. Include the extra Units as necessary (e.g. 500ft = 5 units). To delete 'Voucher Extras' click on '**X**'. To add items to the 'Voucher Extras' list refer to the 'Chargeable Items' section for instructions.
- Select Aircraft from dropdown list:
 - Flight Type: Choose 'Standard' or Aerobatic' from the dropdown list
 - Launch Type: Choose from the dropdown list
 - Where 'Aerotow' is chosen, complete the relevant TUG and release height.
- Click on '**Free Launch**' and/or '**Free Time**' as required.

Click on **‘Create Flight’**: Flight will be included within Flight Registry

- If the voucher holder has multiple flights on his voucher, to view the remaining flights click on ‘Valid Voucher List’, click on ‘Apply’ against the relevant Voucher; then continue as previously.

2.4 New MG/TUG Flight

From the Home Menu click on Shortcuts / New MG/TUG Flight

Fields with a ‘red line’ indicate a required field.

This function via the Admin Section would generally be used for recording after the event flights.

Flights can be ‘Created’ prior to Take off, with times and/or Tacho, added later either on a **‘Now’** or a specified time and Tacho basis.

- Tacho Start is prefilled. Check for accuracy
- Enter Tacho end.
- Enter date, Takeoff time and landing time.
- ‘Pilot 1’, ‘Pilot 2’ names and ‘Charge to’ fields will show a list of possible pilot names after commencing typing; click on the required pilot.
- Select Aircraft from dropdown list
- Flight Type: Choose from the drop down list. Each flight type may have a different charge.
- Click on **‘Create Flight’**: Flight will be included within Flight Registry

Voucher flights

- Tacho Start is prefilled. Check for accuracy
- Enter Tacho end.
- Enter date, Takeoff time and landing time
- Pilot 1 name; By typing 3 letters from either the name or surname, a list of members’ names will appear,

Tick the **‘Voucher Flight’** box.

- Choose ‘Product Code’ from dropdown list
- Complete Voucher Number (either the serial number from the Voucher or the ‘T’ number or if left blank the system will generate a random number)
- Complete Pilot 2 details i.e. the name of the Voucher holder (this automatically generates the holder as a temporary member, for a period of one month or as required)
- Select Aircraft from dropdown list:
- Flight Type: Do not change the default.

2.5 New Invoice

From the Home Menu click on Shortcuts / New Invoice

Fields with a ‘red line’ indicate a required field.

An Invoice will be generated automatically after every flight. Other items can be invoiced by manually creating a **‘New Invoice’**.

Find the Member by entering the first few digits of their name under '**Member Name**' and clicking from the list.

'Invoice Items':

- Input items onto the Invoice, via the 'Apply Chargeable Item' panel in the left hand menu:
 - 'Charge Type' and 'Chargeable Item': Choose from the dropdown list. (These items can be added to or adjusted by contacting the System Provider).
 - Click on '**Apply**'
- Further information can be included under 'Item Description'; 'Accountancy ID' and 'Invoice memo', as required.
- Click on '**Create Invoice**'

A list of 'Account Transactions' and the balance on the Account, will be shown on screen, including options to:

- Generate a '**PDF**' of the Invoice (click on the computer back arrow to return to the screen)
- Click on '**Invoice**' to view and/or 'Edit Invoice'
- Click on '**Flight**' to view and/or 'Edit Flight'
- Click on '**X**' and then '**Remove**' to delete Invoice
- Click on '**Debit**' to create a New Invoice
- Click on '**Credit**' to apply a payment to a members' account

Creating a recurring transaction:

- Enter details as per above
- Click the box Recurring
- From the drop down menu choose the frequency
- Start date: Should not be the same date as the date the recurring transaction is created.
- End date as required
- Click on Create Invoice

2.6 New Credit

From the Home Menu click on Shortcuts / New Credit
Fields with a 'red line' indicate a required field.

- Under 'Apply Creditable Item':
 - Select 'Credit Type' and then the associated 'Creditable Item' from the dropdown lists
 - Click on '**Apply**', complete the remaining information relating to the credit.
 - Click on '**Update Credit**'

- To add a new credit item click on '**New Creditable Item**';
Fields with a 'red line' indicate a required field.
 - Choose 'Credit Type' from dropdown list
 - Input 'Accountancy ID' to enable automatic data upload into Clubs' Accounting systems
 - 'Amount' is for any extra standard charge to be applied to that type of payment (e.g. to cover Credit Card payment charges)
 - Tick 'non-removable' if an item should not be removed from the system
 - Click on '**Create**'. A green boxed message will confirm that the changes have been applied.

- To edit existing items click on '**Manage Creditable Items**' and then on the relevant 'Tag' name, amend details and click on '**Update**'.

3.0 REPORTS

From the Home Menu click on Reports / (then the Report required)

3.1 Aircraft Flight Time Report – The Report will provide details of:

Total number of flights flown and total time, per aircraft

This Report is useful to update Aircraft Logbooks.

- Click on ‘Print Report’ to print
- ‘Filter by’ option on left hand menu, allows searching via Aircraft Group and date periods.

3.2 Total flight time breakdown (P1, P1MS, P2) – Provides details of:

Total number of flights and total time, per pilot

This Report is useful for the CFI to keep an eye on the flight pattern of each member.

- Use ‘Filter by’ option on left hand menu, to search using date periods.
- Click on ‘Print Report’ to print

3.3 Aircraft Launches Report – Provides details of:

Flight type e.g. Winch, Standard; Number of Free and Paid flights

- Use ‘Filter by’ option on left hand menu, to search using date periods.
- Click on ‘Print Report’ to print

3.4 Aerotow Launch Report – Provides details of:

Flight type e.g. Standard; Number of flights and Total Height

- Use ‘Filter by’ option on left hand menu, to search using date periods and Aircraft.
- Click on ‘Print Report’ to print

3.5 Statements – use the ‘Filter by’ option on left hand menu to search for Statements for:

- All members (N.B. currently bugs being worked upon)
- All members in credit (N.B. currently bugs being worked upon)
- All members in debit (N.B. currently bugs being worked upon)
- All members excl. inactive & blocked (N.B. currently bugs being worked upon)
- Selected member only (N.B. Working very well)
- Statement period

3.6 Sales Report – Provides the Sales split between each Accountancy ID; this is available as a Print Option currently, but enhancements shortly to be introduced will allow download to a CSV file, which can be uploaded directly into a Clubs’ Accounting System (The formatting of the CSV can be adjusted depending upon a Clubs’ Accountancy System)

- ‘Filter by’ option on left hand menu, allows searching between date periods.

3.7 Voucher Report – Not currently in use. **See 1.7**

3.8 Voucher Providers Report – Provides details of how much each Provider owes in relation to Vouchers they have sold on behalf of the Club.

- ‘Filter by’ option on left hand menu, allows searching between date periods.
- Click on ‘Print Report’ to print

3.9 Item Report – Provides a list of entries relating to specific Accountancy ID.

- Type the Accountancy ID in the box and the period ‘from’ and ‘to’; Click on ‘Go’ (e.g. Report can show all Winch Launches (Accountancy ID of 3001) over the last month)

3.10 Members Total Balances – Provides a total of the credit and debit balances for all members.

- Use the ‘Filter by’ option on left hand menu, to obtain the balances at a specific date.
- Click on “Click here to show detail information” will show balance for each member.

3.11 Recurring Transaction report – Provides details of all recurring transactions for a particular member.

- Use the ‘Filter By’ option on the left hand menu, to choose the Member and the date range
- Click ‘Go’

3.12 Future Transaction report – Provides details of all members’ future recurring transactions- Filter by name is NOT AVAILABLE.

- Enter Date Range leaving Name blank
- Click ‘Go’

4.0 PRICE LISTS

From the Home Menu click on Price Lists / (then the List required)

4.1 Winch Price List – Lists the Charge for a Winch depending upon type of Membership

- Click on ‘Edit Price List’ to amend charges
- Click on ‘Update’ to apply. A green confirmation message will confirm that the changes are applied.

4.2 Aerotow Price List - Lists the Charge for Aerotows, split between aircraft and for each type of Membership

- Click on ‘Edit Price List’ to amend charges
- Select the Aircraft from the dropdown
- Fill in the fields as required, if the charging structure is layered click on ‘Add New’, the minimum charge field will be auto filled, ensure to always have a maximum height in each layer.

Note; if subsequently you want to edit the aerotow price of a specific aircraft the minimum charge of each layer has to be calculated manually.

Hint; the best way to go about avoiding any mis-calculation, just remove all layers and reintroduce them again.

- Click on ‘Update’ to apply. A green boxed message will confirm that the changes have been applied.

To include aircraft in this section, when setting up a ‘New Aircraft’ include the prefix ‘TUG-’ within the ‘Aircraft Category’

4.3 Aircraft Flight Price List – Lists the prices for each aircraft, including ‘Charge per Minute’ and ‘Fee for Self Powered Launch’.

- Click on ‘Edit Price List’ to amend charges or add charges to an aircraft. Select aircraft to amend or add from the dropdown list. New aircraft need to be set up as a ‘New Aircraft’ – refer to the Shortcuts Menu / New Aircraft section for instructions.
- Click on ‘Update’ to apply. A green boxed message will confirm that the changes have been applied.

5.0 INVOICING

From the Home Menu click on Invoicing and the required option.

5.1 Chargeable Items – Provides a list of all items that the Club charges for (e.g. Flying Income; Membership Fees)

- Click on the item in the column headed ‘Tag’ to edit a Chargeable Item and click on ‘Update’ to apply changes. A green boxed message will confirm that the changes have been applied.
- ‘Filter by’ option on left hand menu, allows searching on Item name/title; charge type and the option to change the order of items.
- Click on ‘New Chargeable Item’ to add an Item.
Fields with a ‘red line’ indicate a required field.
 - Choose from the dropdown box to confirm the ‘Charge type’ (e.g. Flying Income; Fuel)
 - Include details: Accountancy ID, Item Name, Units, Unit Price,
 - Where an item should not be allowed to be removed/edited from an Invoice (e.g. Winch Fee), tick the ‘Non-removable?’ box
 - Click on ‘Create’ to apply. A green boxed message will confirm that the changes have been applied.

5.2 Manage Creditable Items – Provides a list of all types of credit/payment the Club may receive.

- Click on the item in the column headed ‘Tag’ to edit a Creditable Item and click on ‘**Update**’ to apply changes. A green boxed message will confirm that the changes have been applied.
- ‘Filter by’ option on left hand menu, allows searching on Item name/title; charge type and the option to change the order of items.
- To add a new credit item click on ‘**New Creditable Item**’;
Fields with a ‘red line’ indicate a required field.
 - Choose ‘Credit Type’ from dropdown list
 - Input ‘Accountancy ID’ to enable automatic data upload into Clubs’ Accounting systems
 - ‘Amount’ is for any extra standard charge to be applied to that type of payment (e.g. to cover Credit Card payment charges)
 - Tick ‘non-removable’ if an item should not be removed from the system
 - Click on ‘**Create**’. A green boxed message will confirm that the changes have been applied

IMPORT CREDIT AND IMPORT CREDIT TEMPLATE ARE BEING TESTED.