Bookings

Central Reservation Project

v1.0 April 2023

Version	Date	Notes	Author
1.0	04-04-23	First draft to support the release of Central Reservation Project	B. Juddoo

Contents

Project Context

The Central Reservation Project originated within the Zonal Product Office after several issues were brought forward by the team with regards to the lack of some functionalities brought forward by clients. This project is divided into 4 main functionalities, namely:

1. Central Reservation feature flag
2. Labels
3. Tasks
4. Invoice

1.Central Reservation Feature Flag

The Central Reservation project is sold as an add-on based on the subscription chosen by the client. Hence, a Central Reservation feature flag has been created that allows Zonal Estate admin/Zonal admin users to turn on or off all functionalities (mentioned above) linked to the Central Reservation Project.

The feature flag called 'Central Reservation' is added to Zonal Admin View under 'enabled features' for each estate, as illustrated in Fig.1.

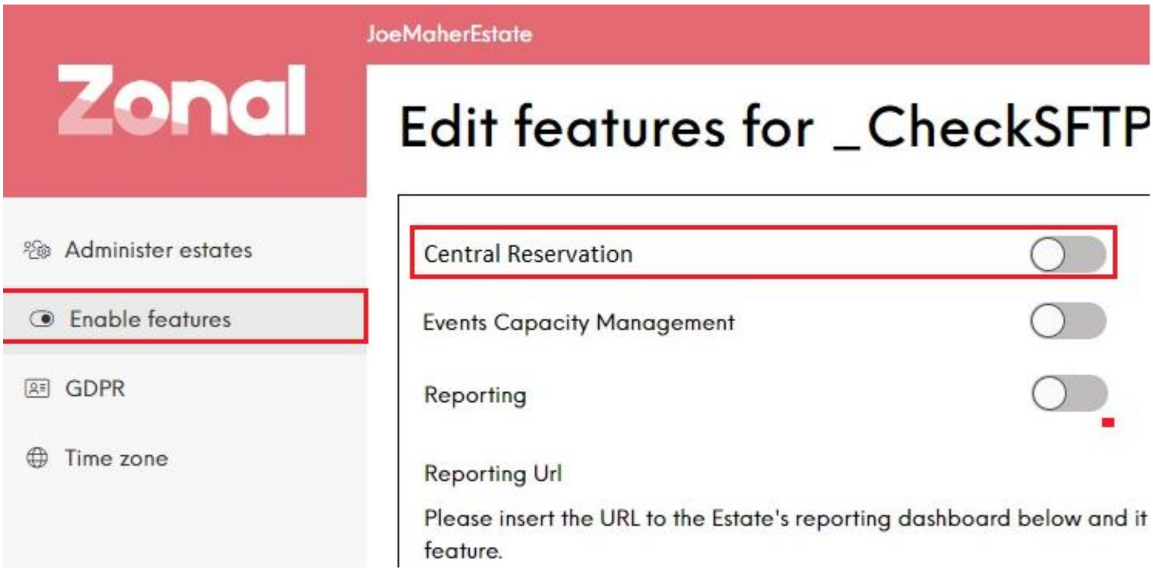


Fig.1

Conditions of Central Res Feature flag:

- By default, the toggle is off.
- If the toggle is turned on, the following features are enabled for the estate:
    - Central Reservation tab on Events Admin
        - Labels
        - Tasks
        - Invoice
- User can turn on/off the toggle at any time.

2.Labels

The ‘Labels’ feature allows Central Sales, Zonal estate admin and Zonal admin users to manage bookings across the business but also covering different departments (e.g., operations, finance, sales etc.). There are similarities between ‘Tags’ and ‘Labels’. However, the main difference is, labels are managed by the events admin users. They will have full control over creating, editing, and deleting labels.

EVENTS ADMIN APP > LABELS TAB

As shown below in Fig.2, the labels tab is found under ‘Central Reservation’ menu tab on the Zonal Admin app.

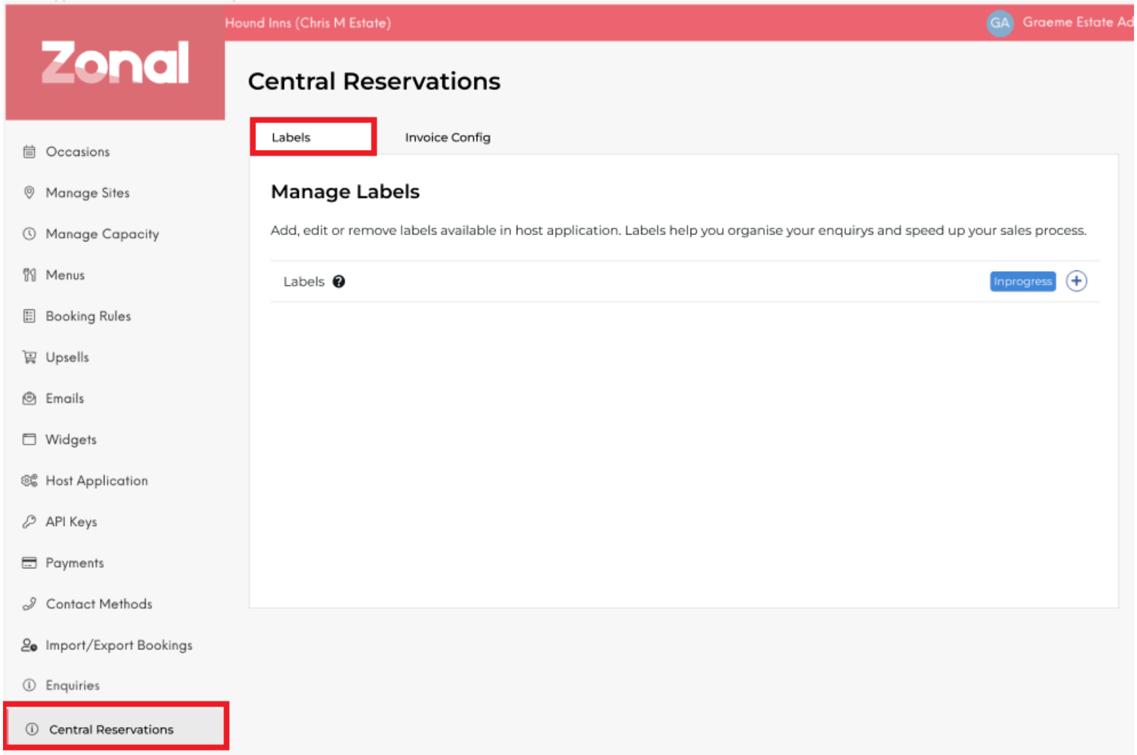


Fig.2

Allowed user roles (only those roles are allowed to access this tab):

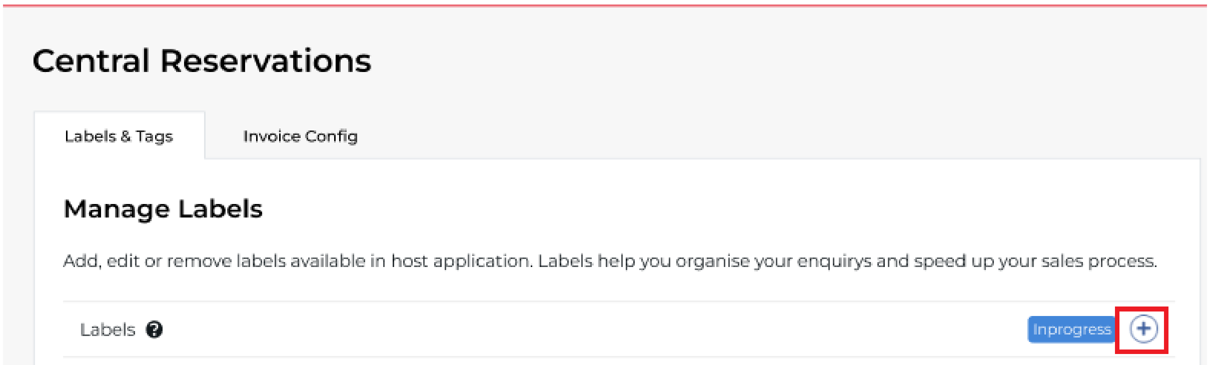
- Zonal Estate Admin
- Zonal Admin

On the ‘Label’ tab, Estate/Zonal admins can:

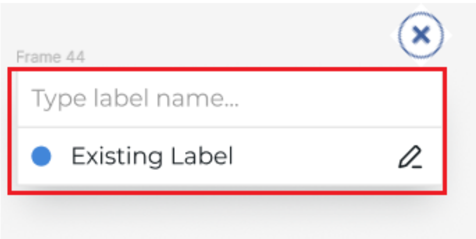
- Create a label.
- Edit a label.
- Delete a label.
- Assign colors to each label.

CREATE A LABEL

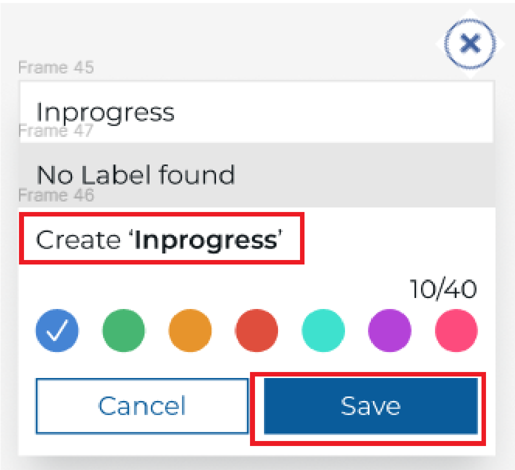
To create a label, they can click on ‘+’ button.



A search box appears with the list of existing labels (if any)



The user can type any label name and if the label is not found in the list, the user clicks 'create [labelname], assign a color and click on save



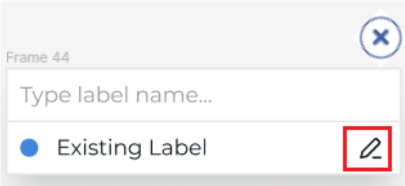
Once a label is created, it is displayed on the main tab.

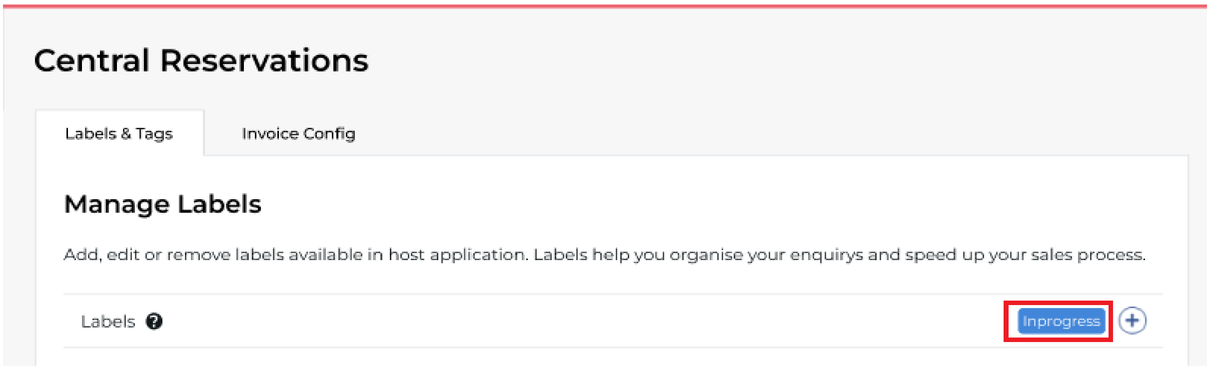
Conditions when creating a label:

- Labels are assigned per estate
- Label name is a mandatory field; hence labels cannot be created without any 'label name'
- Label name field has 40-character limit
- User can choose between 8 colors only

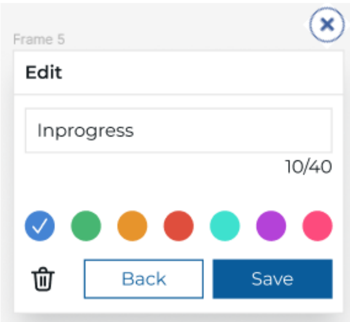
EDIT A LABEL

To edit an existing label, they can click on click on the label on the main tab or click on the 'pen' icon

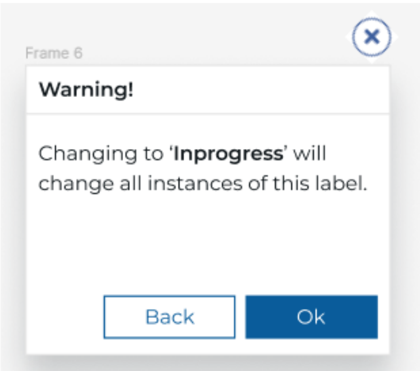




Both opens the 'edit' label item box and the user can modify the name of the label and color assigned.



On save, a warning message appears to confirm such action

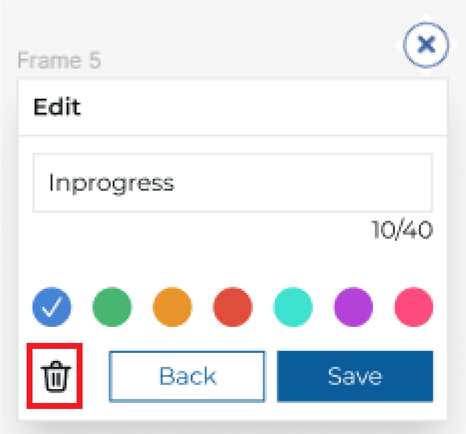


Conditions of editing a label:

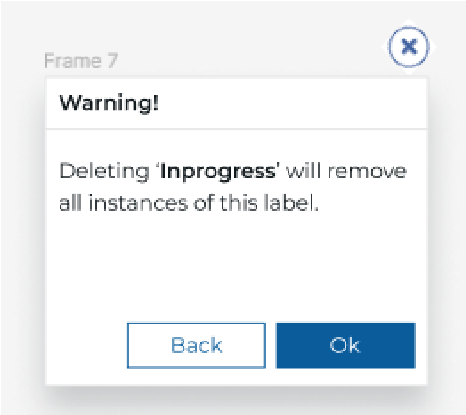
- Users can only edit existing labels
- User can change name/color of existing labels
- Labels on Host App is updated based on changes made on Events admin (new bookings/enquiries, future bookings/enquiries already created, historical bookings/enquiries)

DELETE A LABEL

To delete an existing label, they can click on click on the 'bin' icon



On click, the user is prompted with the following warning message



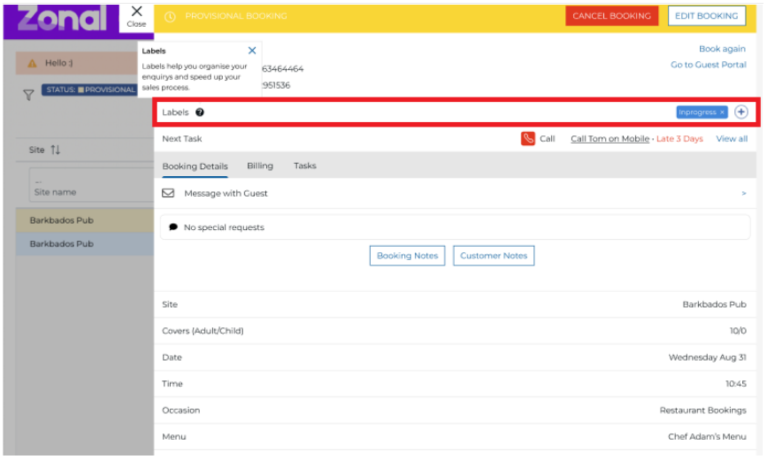
Conditions of deleting a label:

- Users can only delete existing labels
- Past bookings are not impacted by a deleted label – they will remain visible on Host App
- Future bookings are impacted by a deleted label – It will not visible anymore on Host App.

LABELS ON EVENTS HOST APP > BOOKING PANEL

For each booking/enquiry, the Host App can add a pre-defined label by clicking on the '+' icon on the booking panel:

Created Booking/Enquiry View:



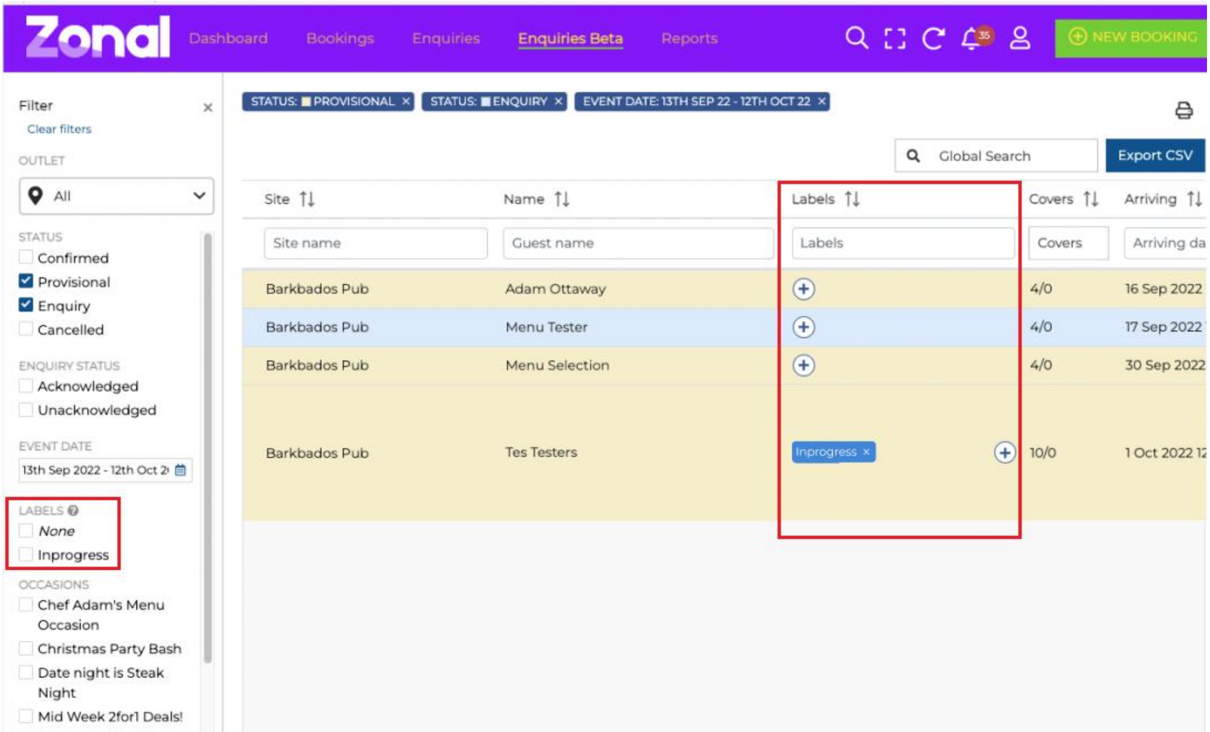
Editing booking/enquiry view:

Conditions of adding labels on Host App:

- Host App users can only choose and assign pre-defined labels to a booking/enquiry.
- Host App users cannot create labels on Event Host App
- Deleted Labels are not displayed in the list for future bookings/enquiries.
- Deleted Labels are kept and displayed for past bookings/enquiries only.
- Users cannot add labels for past bookings/enquiries.

LABELS ON EVENTS HOST APP > ENQUIRIES BETA PAGE

A new column called 'Labels' has been added to enquires beta page.



Users can search by 'labels' using the label search filter on left hand menu bar.

Conditions for searching labels on Host App – Enquiries Beta:

- All types of labels are displayed on the left-hand menu (existing and deleted labels)
- Labels column is added to 'Export CSV'/ Print
- Labels column and filter option are hidden when the 'Central Res' flag is switched off.
- Labels column is hidden in 'Export CSV/Print' when the 'Central Res' flag is switched off.

3. Tasks (Actions)

The ‘Tasks’ feature allows Host app users create tasks (Actions) for a booking so that they can follow-up on a booking or enquiry.

CREATE A TASK

To create a task, users can click on the ‘New task’ button as shown in Fig.3

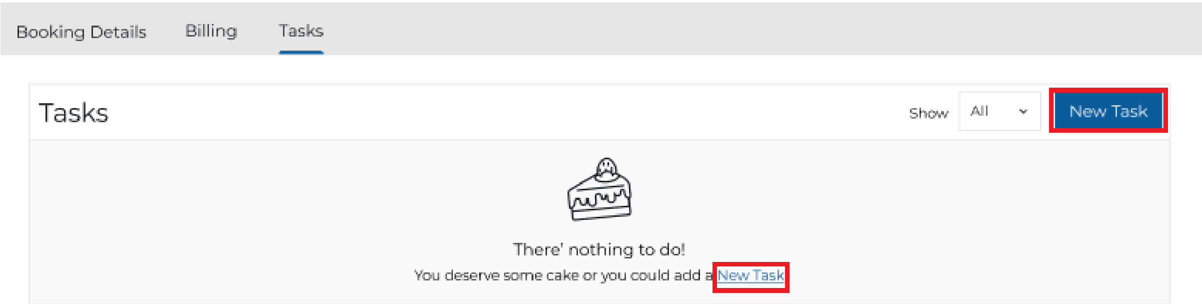


Fig.3

On click, a pop appears where the user can configure the following parameters (illustrated in Fig.4):

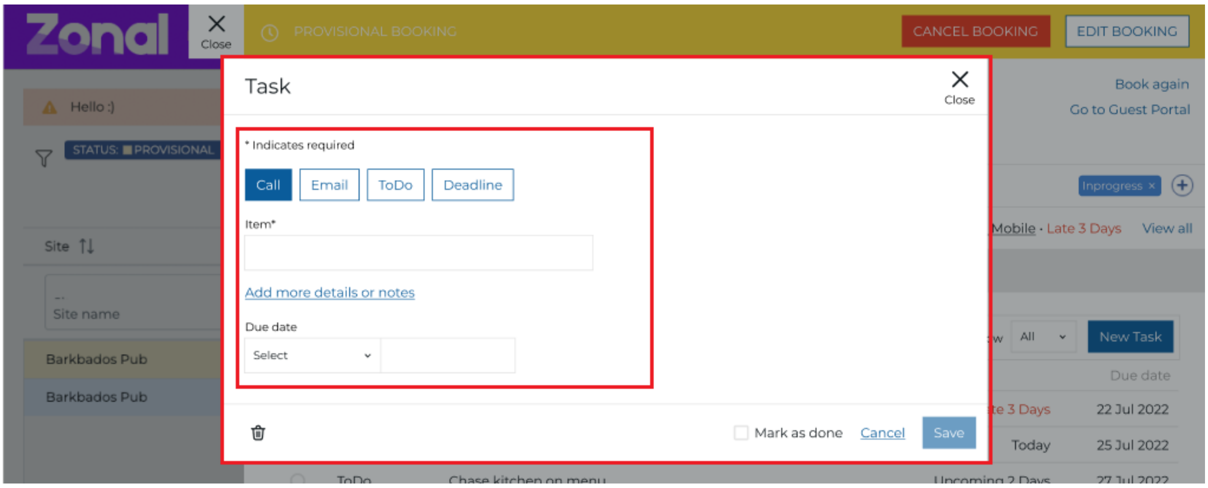


Fig.4

- **Type of task**
    - The user can select one of the following options:
        - Call, Email, ToDo, Deadline
        - This is a mandatory field.
- **Item**
    - This is a mandatory field.
    - 50-character limit
    - This text field is the ‘name’ of the task that is given by the user.
- **Add more details or notes.**
    - This text field is optional.
    - 1000 characters limit
    - The user can use this field to add more details/notes for the respective task.
- **Due Date**
    - This is a mandatory field.
    - Drop-down list with date picker

- It contains some pre-determined dates (e.g. today, tomorrow, 2 days, 7 days…or custom). The 'custom' option is used if the user wants to select a particular date.

Conditions when creating a task:

- Tasks can be created for any type of booking (provisional, enquiry, confirmed, cancelled)
- The user is required to complete all mandatory fields to create a task.

EDIT A TASK

To read/edit a task, the user can click on task created on task main page.

Once a task has been created, a list view of all tasks is displayed on the task main page, as illustrated in Fig.5

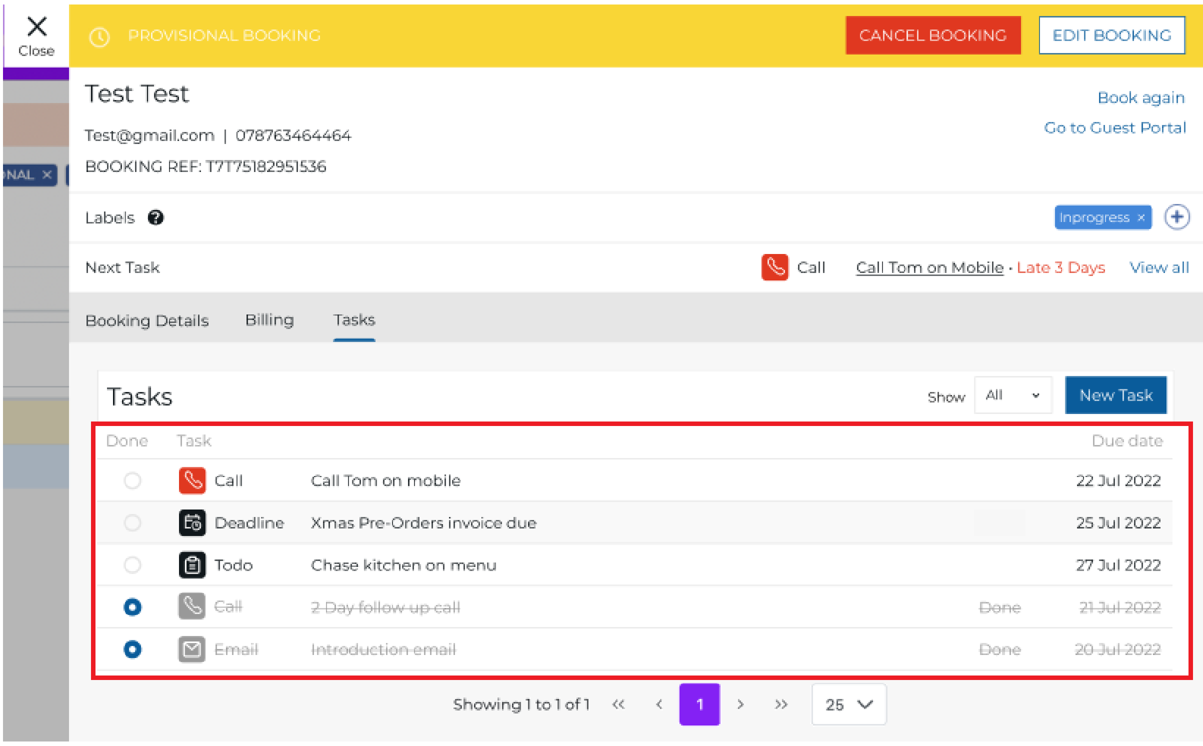


Fig.5

On this list view, the user can see the following details:

- Type of tasks
- Name of item
- Due Date

On click, the task popup opens with pre-filled data and the user can change/update any parameters of an existing task.

Conditions of reading/editing a label:

- Task(s) has been created and saved.

MARK A TASK AS 'DONE'

To mark a task as done, the user can either click on the 'done' button on the task main page or directly on task popup (illustrated in Fig.6 and Fig.7, respectively)

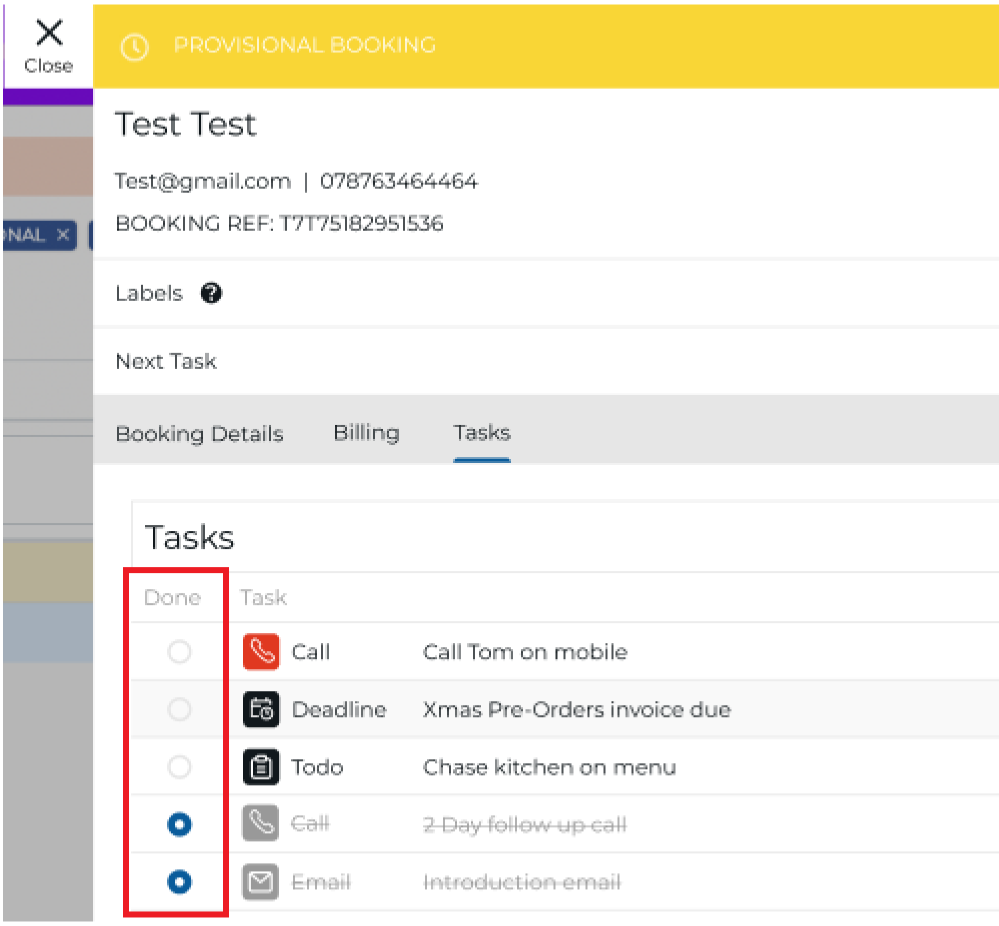


Fig.6

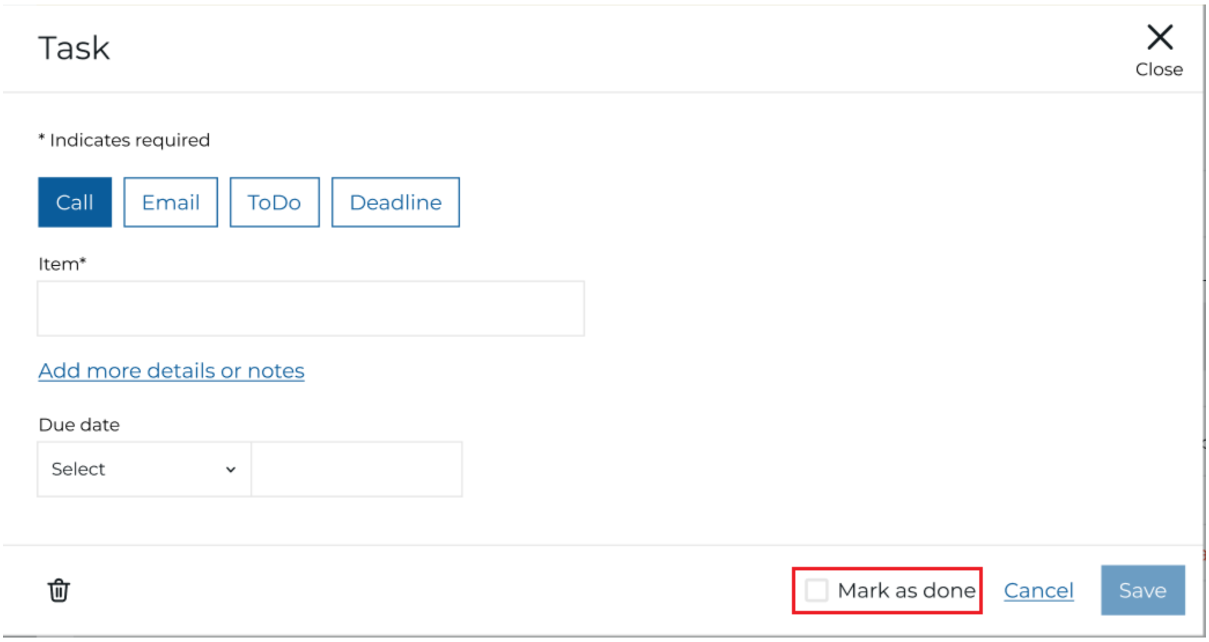


Fig.7

Conditions of ‘Mark as Done’:

- ‘Mark as Done’ is independent of the status of the booking (confirmed, cancelled etc)
- Users must always manually ‘mark’ tasks ‘as done.’
- Outstanding tasks can be marked as done at any point of time during the booking journey (e.g., booking is in the past but there are still some outstanding tasks to be completed)

DELETE A TASK

To delete an existing task, the user can click on the ‘bin’ icon as shown in Fig.8 on the task popup.

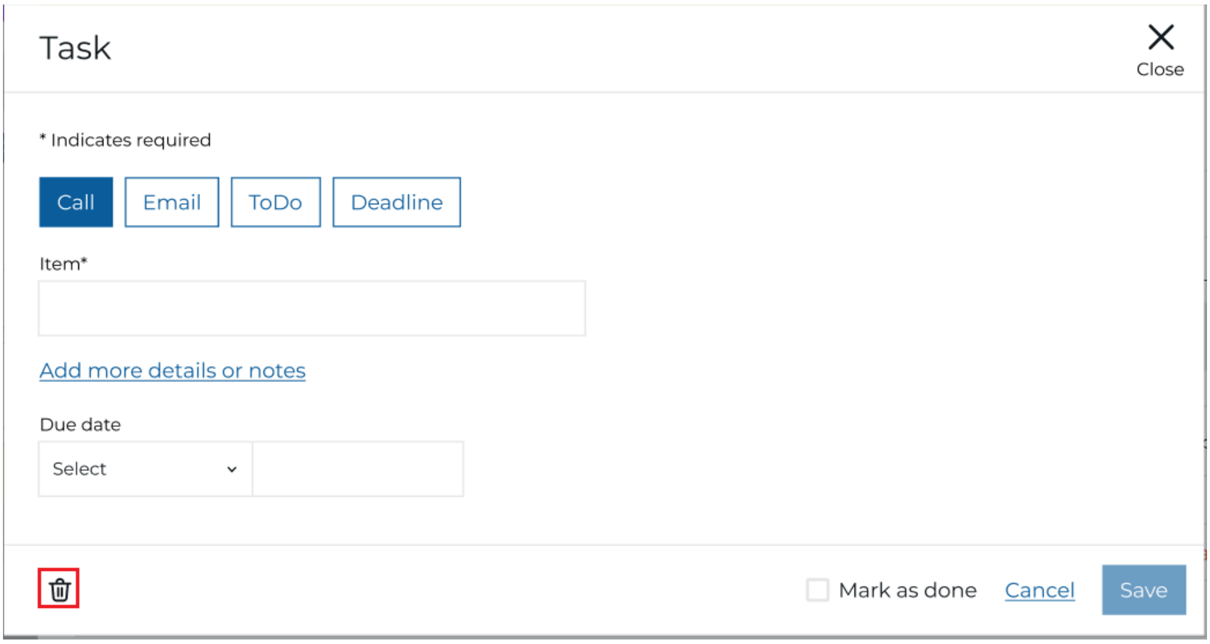


Fig.8

Once deleted, the task will be removed from the task list view. However, it is kept in the History log of the booking.

Conditions of deleting a task:

- Task(s) have been created and saved.
- ‘Delete’ functionality is independent of the status of the booking (confirmed, cancelled etc). It can be done at any time.
- Users must always manually ‘delete’ tasks.

TASK ON EVENTS HOST APP > ENQUIRIES BETA PAGE

A new task column is added to the enquiries beta page to allow users to have a global view on pending tasks for their bookings/enquiries, shown in Fig.9

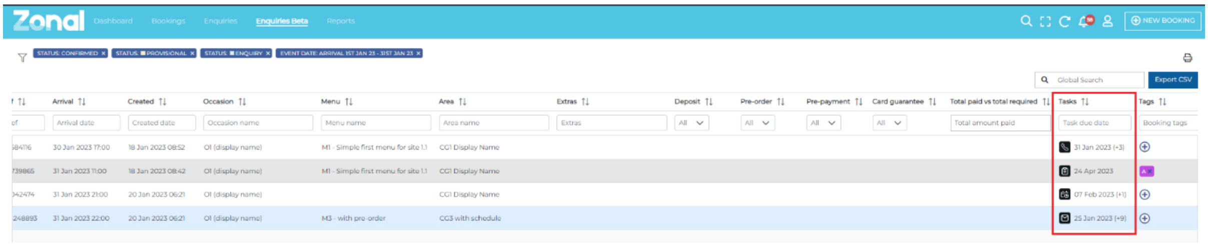


Fig.9

On enquiries beta page, tasks are displayed as:

- (Icon) - Type of task
- Due date of task (Date, Month, Year)

If there are multiple pending tasks for a booking/enquiry.

- The pending task with the earliest due date is displayed.
- Additional tasks are displayed in the bracket format (e.g., +1, +2, +3…)
- Users can use the calendar date picker filter to search by task due date.

On print, as shown in Fig.10, all pending tasks are displayed.

Report printed: 2nd Feb 23, 22:00

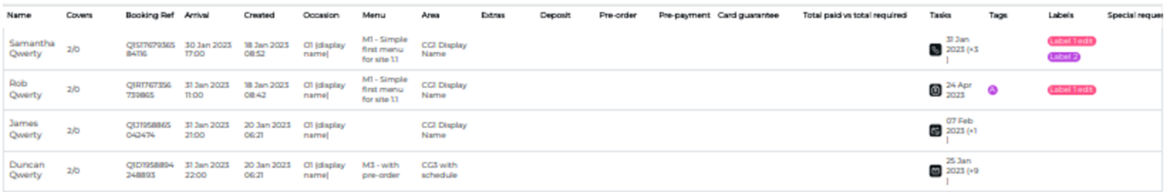


Fig.10

The task column is also added to the Export CSV containing similar details. However, all pending tasks are listed, as shown in Fig.11

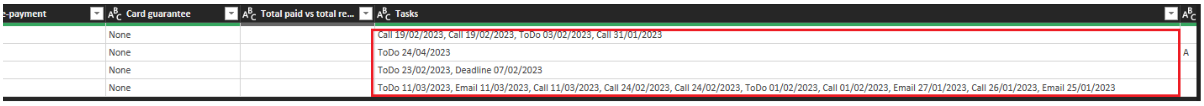


Fig.11

Conditions of Tasks on Enquiries Beta page:

- Only pending tasks are displayed on the Enquiries beta page, Print, Export CSV
- Tasks that are marked as done as not displayed on Enquiries Beta, Print, Export CSV

4. Invoice (Part 1) –Template config. on events admin app

The first part of ‘Invoice’ feature allows Zonal admin & Estate admin users to create an invoice configuration template that will be used when generating an invoice PDF on Host App. This is a mandatory first step to allow ‘invoice’ on Host App to work.

On the central reservation menu, the ‘Invoice Config’ tab is added, shown in Fig.12

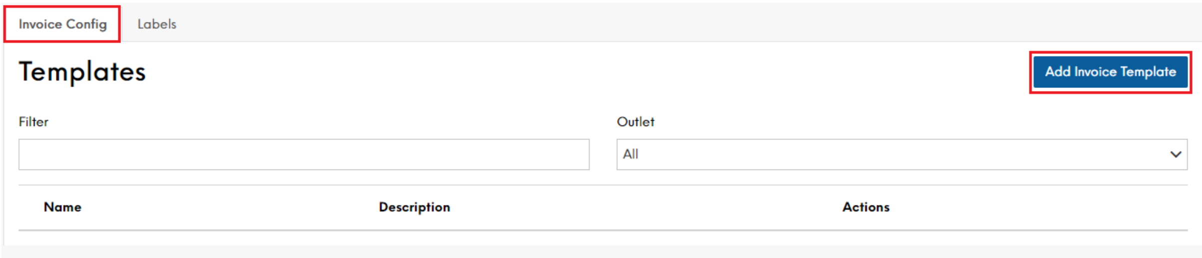


Fig.12

On this page, the admin users can:

1. Add Invoice template.
2. Filter invoice template by name & description
3. Filter invoice template by using the outlet dropdown which displayed the list of companies (brands) within that estate.
4. Edit/Delete invoice template.

CREATE AN INVOICE CONFIG TEMPLATE

To create an invoice template, the user should click on the ‘Add Invoice template’ button, as shown in Fig.12 and the user is directed to invoice configuration page, as shown in Fig.13

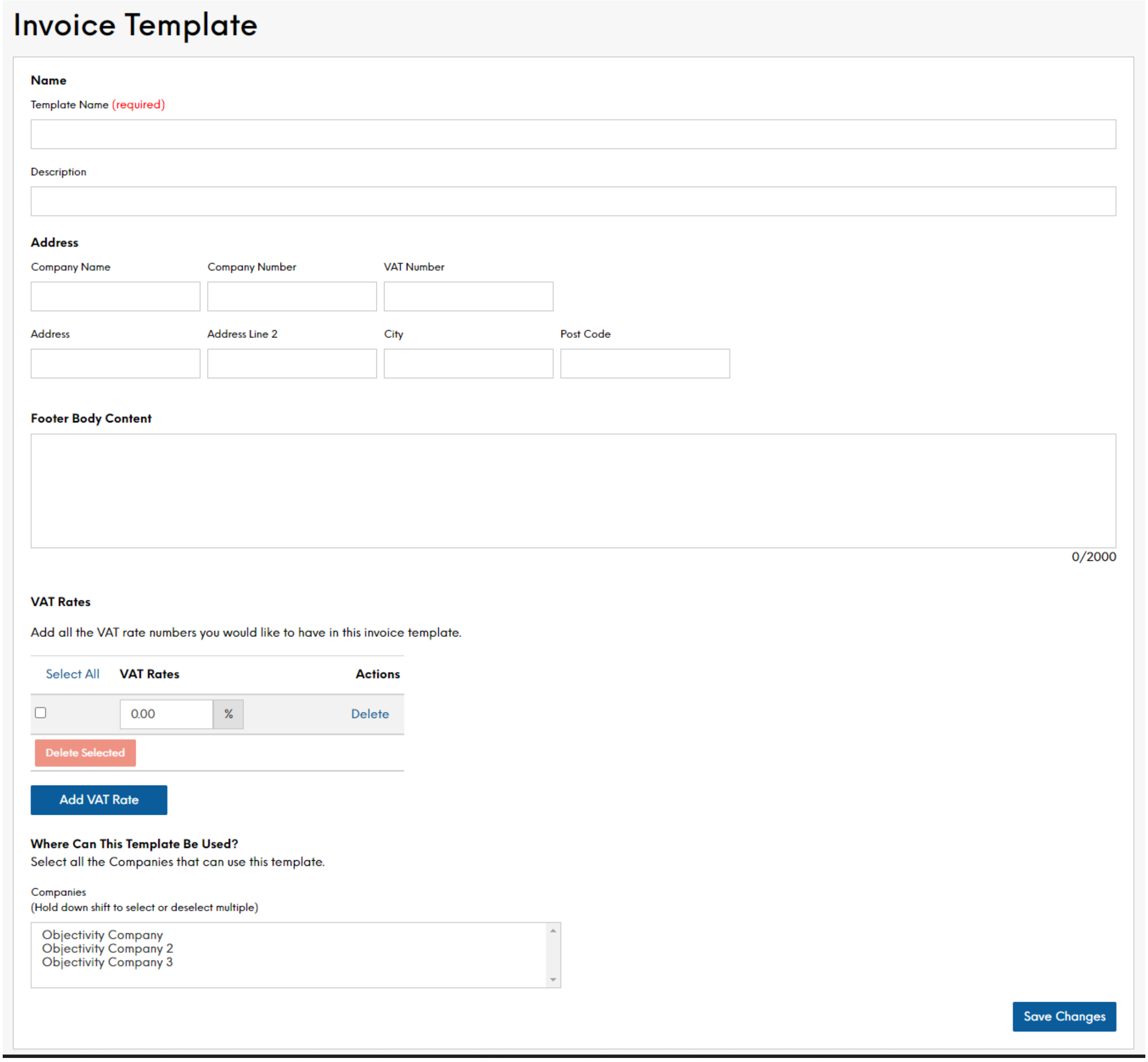


Fig.13

The invoice template contains the following fields:

- **Template Name**
  - Zonal/Estate admin can use this field to name their template.
  - This field is mandatory and has 50 characters limit.
- **Description**
  - Zonal/Estate admin can use this field to add any description for a given invoice template.
  - This field is optional and has 200 characters limit.
- **Address**
  - This field is broken down into the following sub-fields:
    - Company name
    - Company number
    - VAT number
    - Address
    - Address line 2
    - City
    - Post Code

  - Those fields are all optional and has 100 characters limit.
  - Those fields are used to display the companies' address and details on the invoice.
- **Footer Body content**
  - This field can be used to set a footer note that appears on the PDF invoice.
  - This field is optional and has 2000 characters limit.
- **VAT Rates**
  - This field is used to set one or multiple VAT rates that can used when creating an invoice on Host App
  - This field accept 2-decimal points only (e.g., 20% or 17.25%)
  - Users can edit or remove VAT rates any point of time.
  - This field is mandatory.
- **Companies' selection**
  - This field allows the user to select companies for the invoice template.
  - Any sites associated to the selected company/companies uses the configured invoice template.

EDIT AN INVOICE CONFIG TEMPLATE

Once an invoice template saved, the estate/admin user can edit the template, as shown in Fig.14, by click on 'Edit' button.

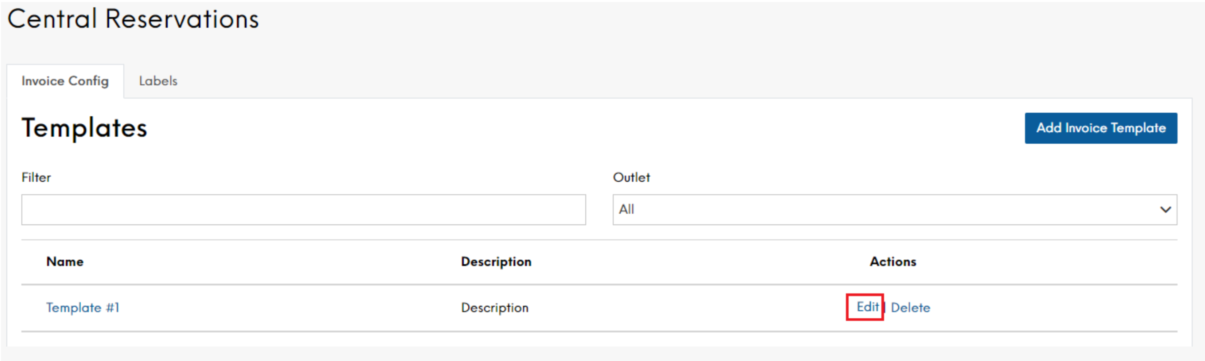


Fig.14

The pre-filled invoice is displayed to the user and the estate/admin user can make any changes to the invoice template, as shown in Fig.15

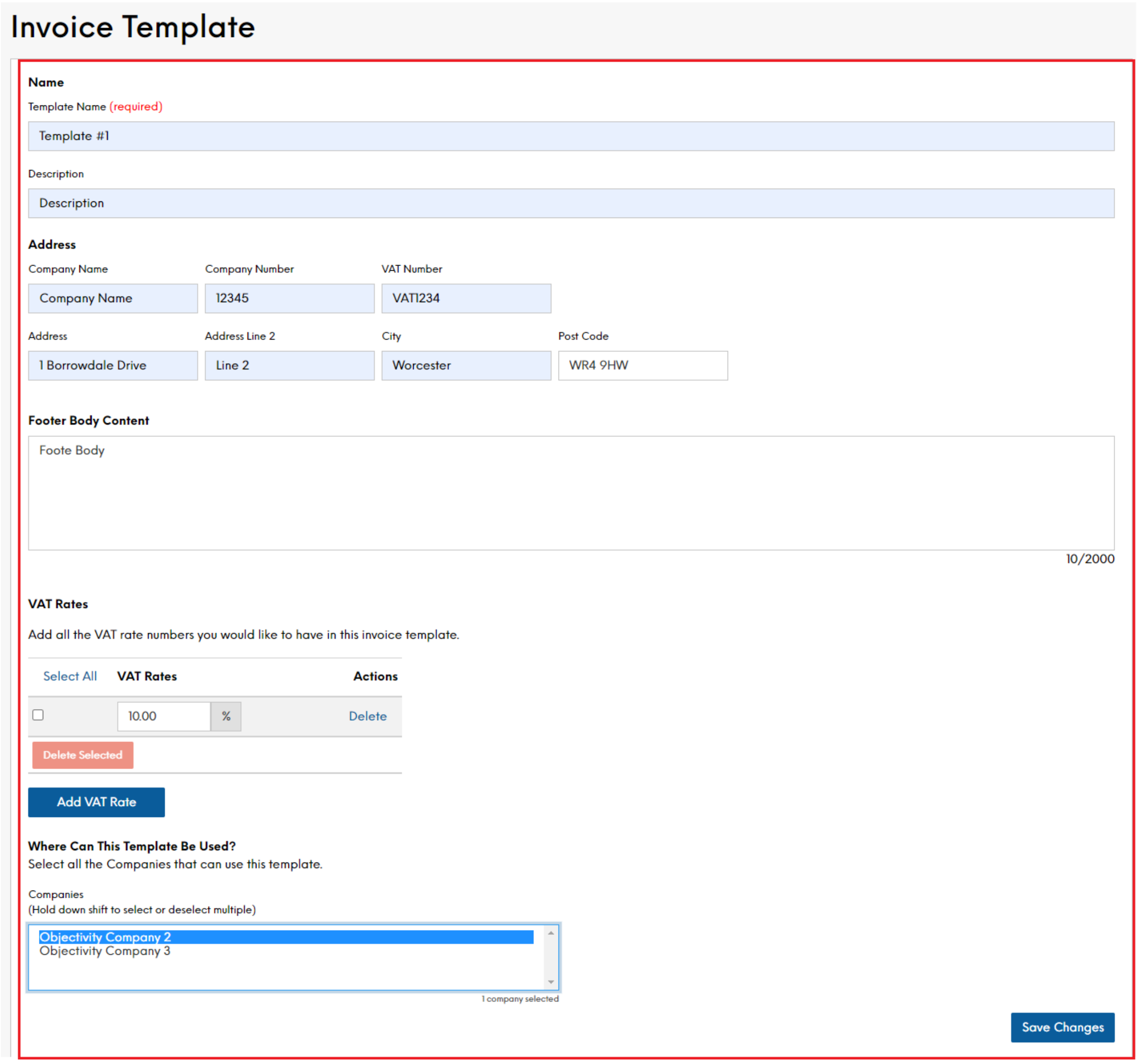


Fig.15

Conditions of 'editing' an invoice template:

- Any edits made to an invoice template is reflected on the Host App > Invoice

DELETE AN INVOICE CONFIG TEMPLATE

The user can also delete an invoice by 'clicking' on the 'Delete' button, as shown in Fig.16

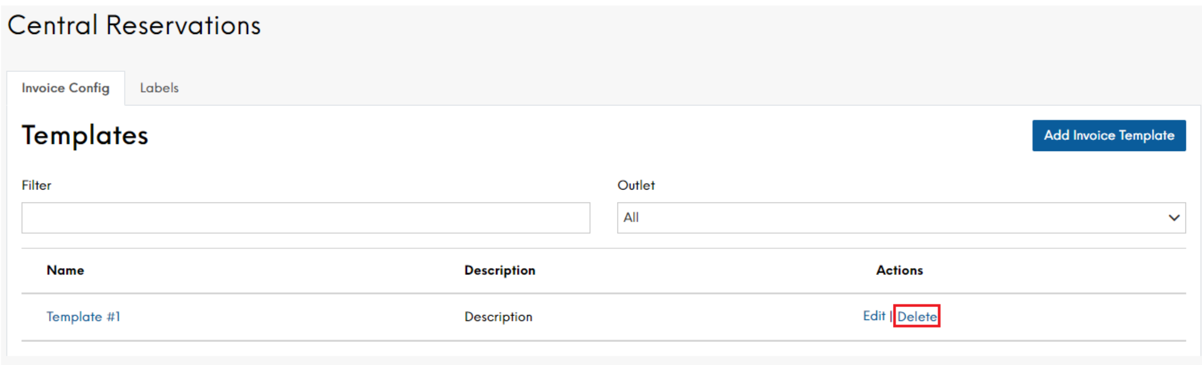


Fig.16

On click, the user is prompted with a warning as shown in Fig.17.

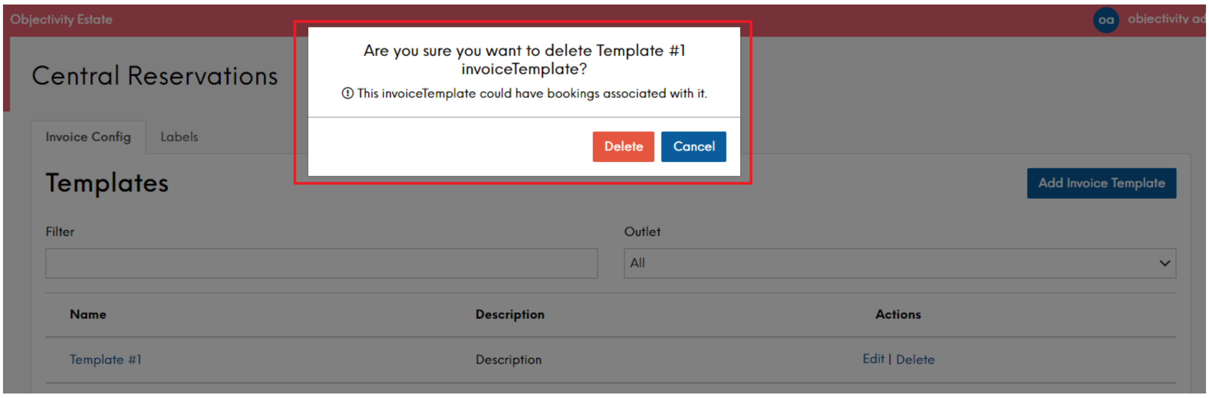


Fig.17

Conditions of ‘delete’ an invoice template:

- Any deleted invoice is reflected on the Host App > Invoice.

4.1 Invoice (Part 2) – Invoice creation on host app

The second part of the ‘Invoice’ feature allows Host app users to quickly create and generate invoices based on their customer’s request on the Events Host application.

CREATE AN INVOICE

To create an invoice on the Events Host application, Host users must navigate to the ‘Invoices’ tab on a booking and click on the ‘New invoice’ button, as shown in Fig.18

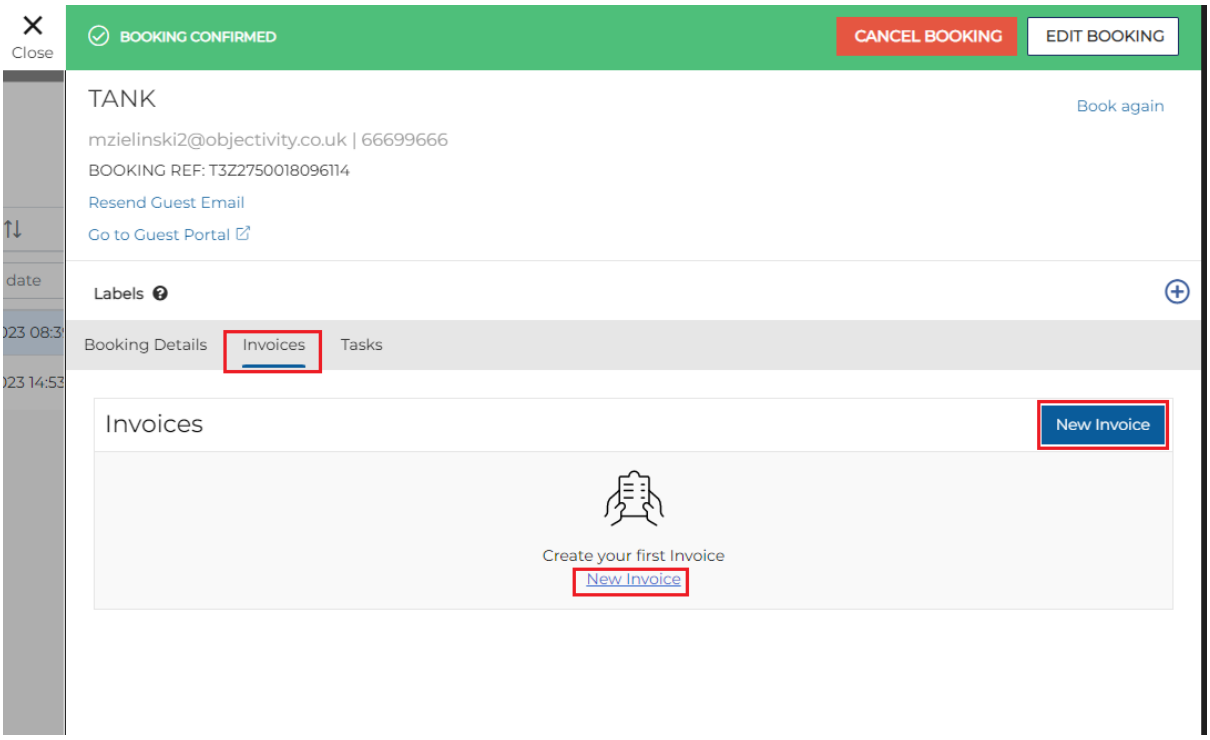


Fig.18

On click, a blank invoice template is displayed to the user, as shown in Fig.19

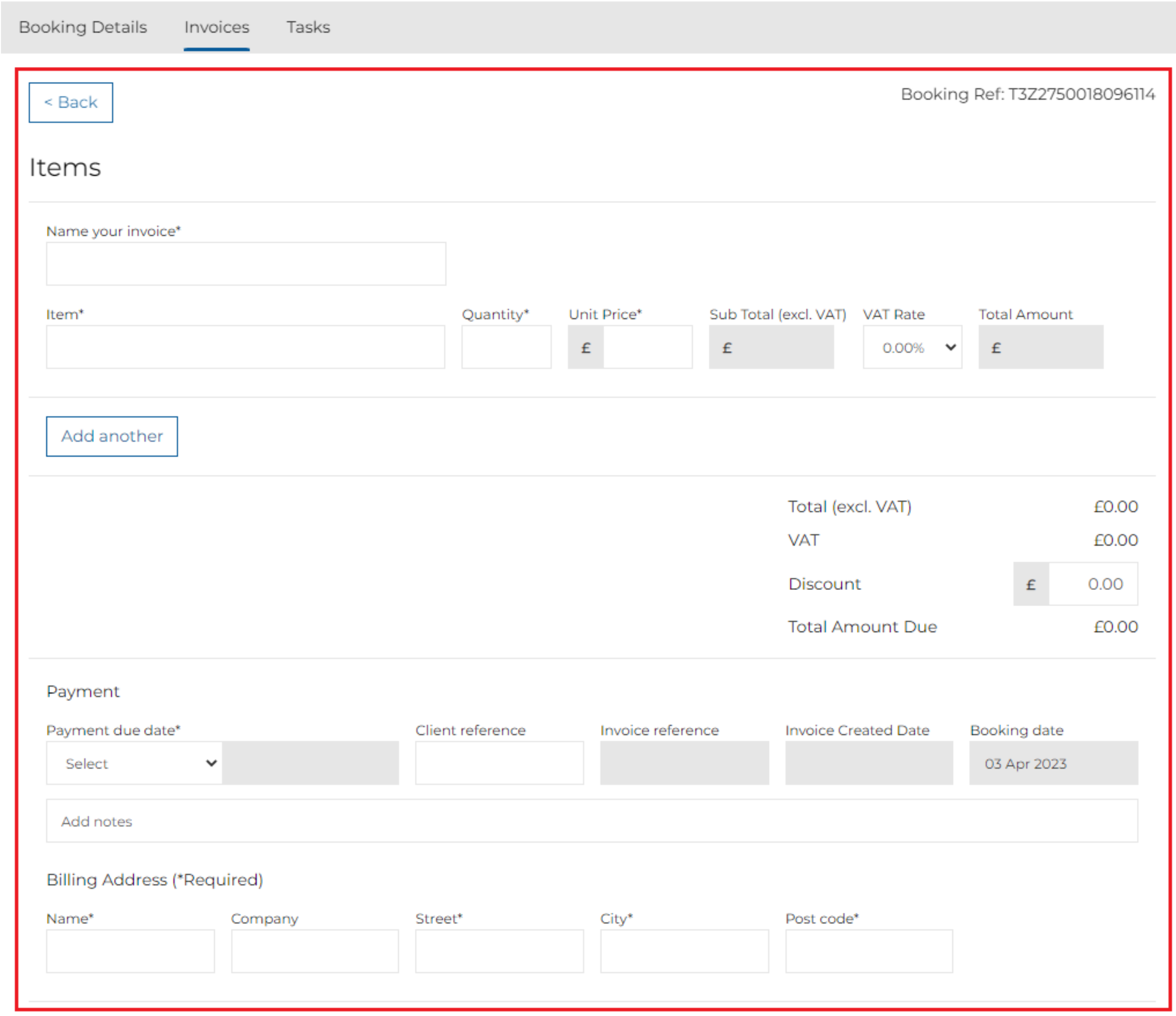


Fig.19

On this page, Host App users can manually insert data for the following fields:

- **Invoice Name**
  - This field is the header of the invoice.
  - It is a mandatory field and has a character limit = 50 characters maximum: 1 character minimum
- **Item**
  - This field is the name of the product (item) on sale (e.g. menu name)
  - Users can add more than 1 item.
- **Quantity Value**
  - This field is the amount of people associated with an item.
  - It is a mandatory field and support only numerical values from -100000 to 100000.
- **Unit Price Value**
  - This field is the price of an item.
  - It is a mandatory field and supports only numerical values from 0 to 100000.
  - It is displayed at 2 decimal point.
- **VAT Rate**
  - VAT rates are displayed in a dropdown list format.
  - The VAT rates available in the dropdown are configured in the invoice template configured on Events Admin

- Users can select only one VAT rate per item.
- **Discount value**
  - This field is the discount amount that the Host app wants to give to the client.
  - It is an optional field and supports numerical values only.
  - The discount amount applies to the Total amount due only.
- **Payment due date**
  - This is a mandatory field.
  - User can select the due date for the invoice by using the calendar date picker.
- **Client Reference**
  - This is an optional field designed for Host users.
  - It can be used to insert a reference number used by internally by the client.
  - It supports both alphabets and numerical values.
- **Billing Address**
  - It is mandatory for the user to fill in some sub-fields, namely:
    - Name
    - Company name [Optional]
    - Street
    - City
    - Post Code

Some fields are automatically generated by the system, namely:

- **Sub-total (Excl. VAT)**
  - Automatically calculated based on quantity and unit price value per item.
- **Total Amount**
  - Automatically calculated based on the sub-total and VAT amount per item.
- **Total (excl. VAT)**
  - Automatically calculated based on the sum of all sub-total.
- **Total Amount Due**
  - Automatically calculated based on the sum of all total amount.
- **Invoice Reference**
  - Automatically generated based on [Year],[INV], [Site ID], [Sequential Numbering]
  - Example: 2023/INV/1/001
  - 2023 = Year
  - INV = Invoice
  - 1 = SiteID
  - 001 = sequential numbering
- **Invoice Creation date**
  - Automatically generated by the system on the date which the invoice is created
- **Booking date**
  - Based on the booking date field

Once all mandatory fields are field by the Host app user, the invoice must be saved to view PDF version. When the user clicks on ‘save’, all fields are locked and the invoice cannot be edited, as shown in Fig.20

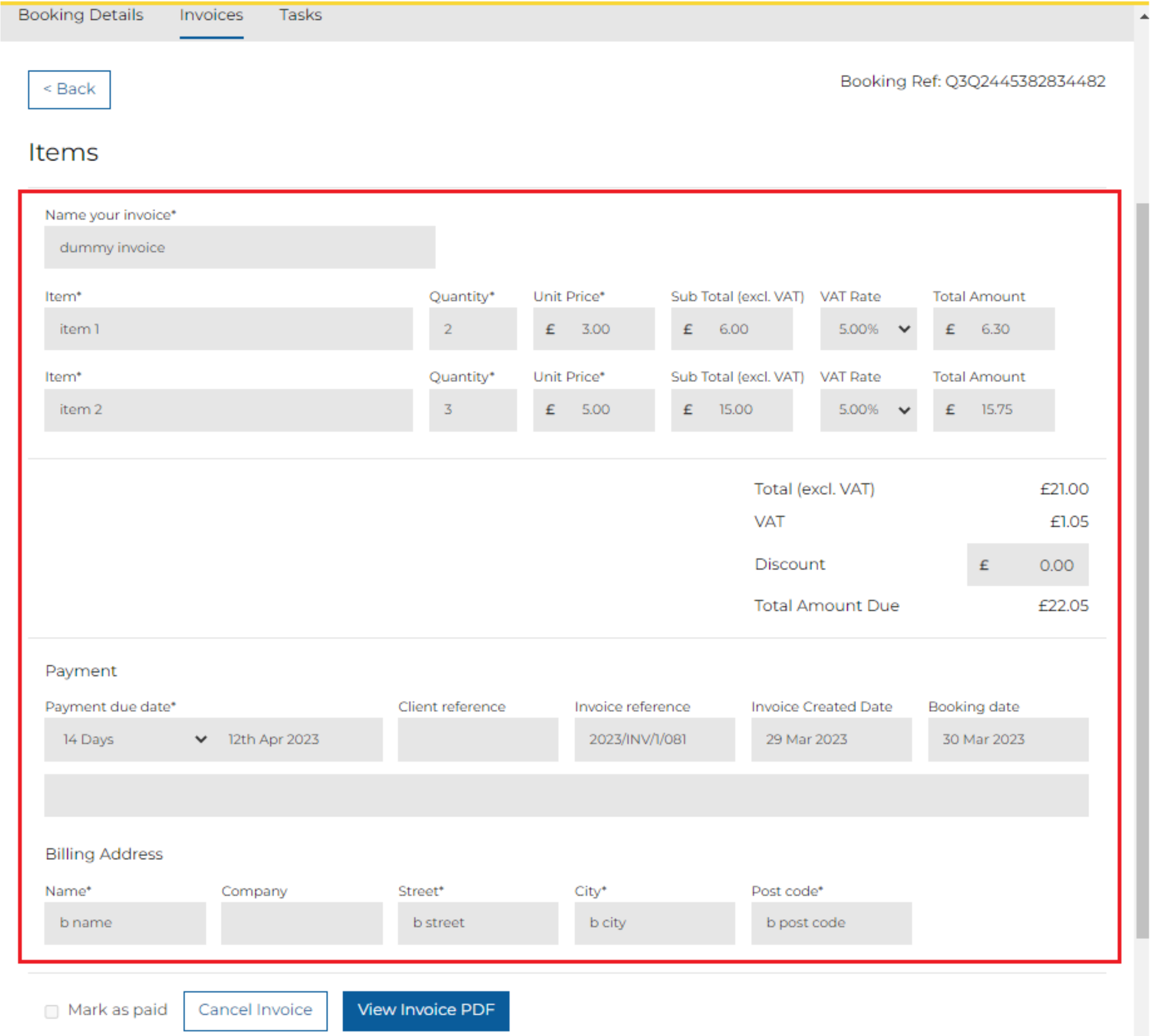


Fig.20

VIEW INVOICE PDF

To download the PDF version of the invoice, the user clicks on ‘View Invoice PDF’ button, and it automatically downloads the file on the user’s device. The PDF version of the invoice is illustrated in Fig.21

Invoice #1

Invoice Reference	2023/INV/1/010
Booking Reference	T3Z2750018096114
Date of Issue	29/03/2023
BookingDate	03/04/2023
Date due	30/03/2023
Client Reference	MyRef123

Company Name	My Company Name	**Bill To:**	John Smith Vine Terrace Gloucester GL1 3BG
Registered Address	123 Borrowdale Drive , Line 2, Worcester, WR1 3BG		
Company Number	12345		
VAT Number	VAT1234		

Item	Quantity	Unit price	VAT%	Sub Amount (excl VAT)	Total Amount
item #1	3	£13.33	5.0%	£39.99	£41.99

Sub Total (excl VAT):	**£39.99**
VAT:	**£2.00**
Discount:	**£0.00**
Total Amount Due:	**£41.99**

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Fig.21

LOG PAYMENT FOR AN INVOICE

Once an invoice is created, the log payment section appears for the user to manually log a payment in relation to the invoice, as shown in Fig.22

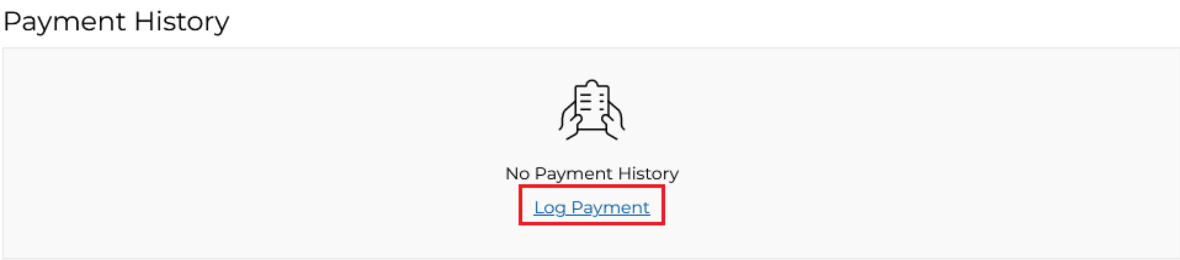

Fig.22

To log a payment, the user clicks on 'Log payment' button and the log payment appears, as illustrated in Fig.23

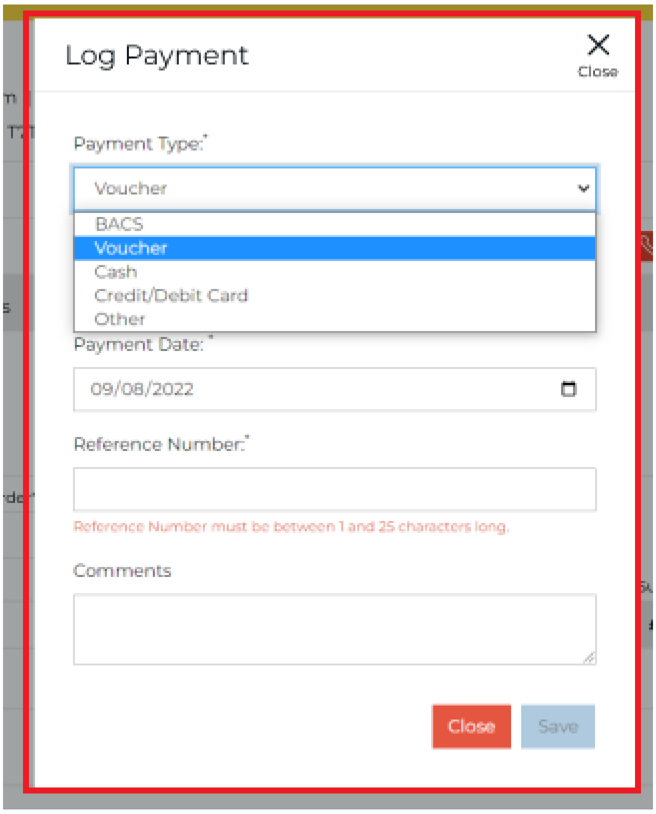

Fig.23

Like the 'Log manual' payment functionality on the booking, this functionality allows the Host app user to log a payment containing the following fields:

- Payment Type
- Payment Value
- Payment Date
- Reference number
- Comments

Conditions for logging a payment:

1. All payment fields are mandatory.
2. Overpayment cannot be logged (payment is greater than the total amount due on the invoice)
3. No negative values can be logged as a payment.
4. Users can log more than payment.

Under the payment section, all payment logged are displayed in a table format, as shown in Fig.24

Payment History

Added	Payment Type	Reference Number	Notes	Amount
21 Mar 2023	Voucher	SUE001010		£20.00
21 Mar 2023	Voucher	GHCBB0001		£100.00
			Total Amount	£120.00
			Remaining To Pay	£0.00

Fig.24

As shown above:

- Total Amount = Total amount due for the invoice
- Remaining to pay = The amount remaining to be paid on the invoice
  - Only when the remaining to pay value = 0.00 that the user can mark an invoice as paid

READ AN INVOICE

All invoices created for a booking are displayed on the invoice tab, as shown in Fig.25

Booking Details | Invoices | Tasks

Invoices

New Invoice

Name	Amount due	Remaining To Pay	Status	Invoice Number	Due	Created
Arman Company Invoice	£120.00	£0.00	Paid	2023/INV/1/027	23 Mar 2023	21 Mar 2023 20:09
Client Request	£180.00	£25.00	Outstanding	2023/INV/1/028	23 Mar 2023	21 Mar 2023 20:21

Fig.25

This view gives the user a global view of the invoices and its details such as:

- Name of invoice
- Amount Due
- Remaining to pay
- Status
- Invoice Number
- Due Date
- Created Date

To view details of an existing invoice, the user can click on the invoice name and will be re-directed to a read-only view of the invoice, as shown in Fig.26

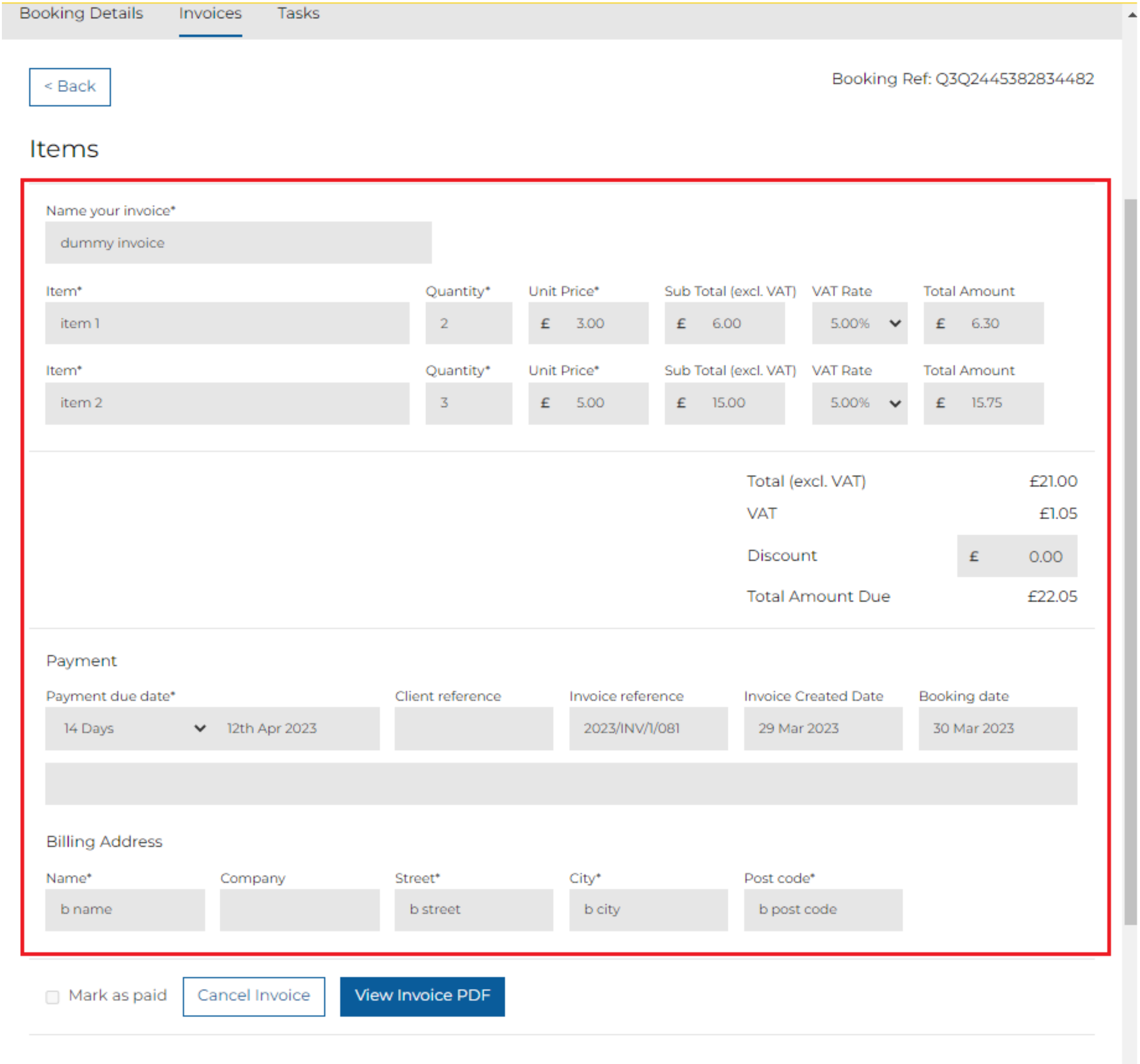

Fig.26

For an invoice, the user can (shown in Fig.27):

Fig.27

- Mark as paid
- Cancel an invoice
- View Invoice PDF

MARK INVOICE AS ‘PAID’

To mark an invoice as 'Mark as Paid', the remaining to pay value must be 0.00. Once the 'Mark as paid' checkbox is selected, the status of this invoice is updated to 'Paid'

CANCEL AN INVOICE

To cancel an invoice, the user can click 'Cancel Invoice' button and a cancellation popup appears, as shown below in Fig.28

Fig.28

On click, a cancel warning popup appears, and the user is requested to insert a mandatory cancellation reason, as illustrated in Fig.29

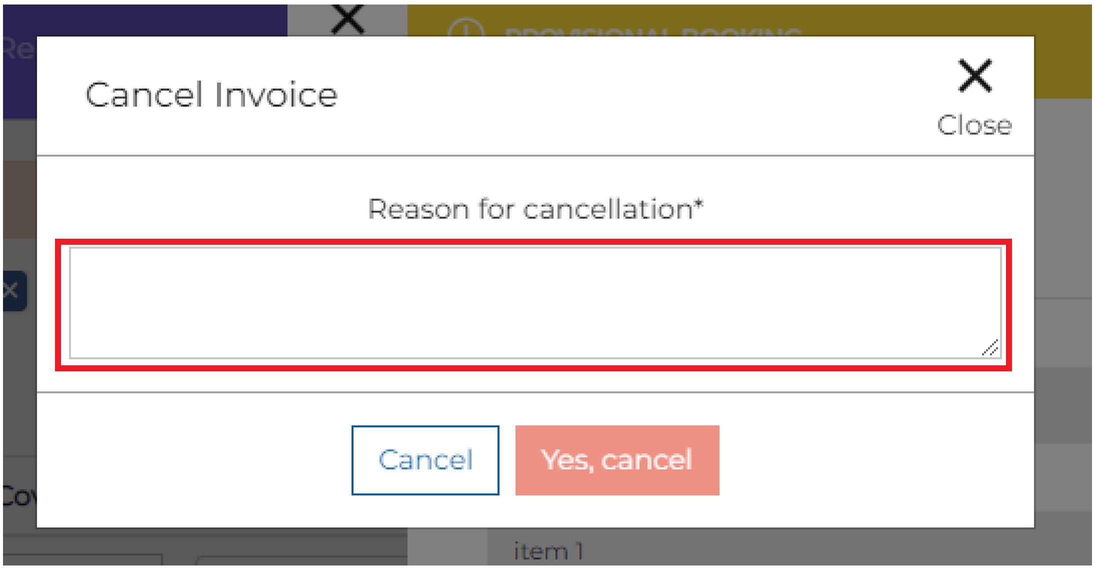

Fig.29

Once a reason has been provided, the user can proceed with the cancellation by clicking on 'Yes, Cancel' button. After confirmation, the invoice is status is changed to 'Cancelled' and on the invoice tab, the invoice is strikethrough, as shown in Fig.30

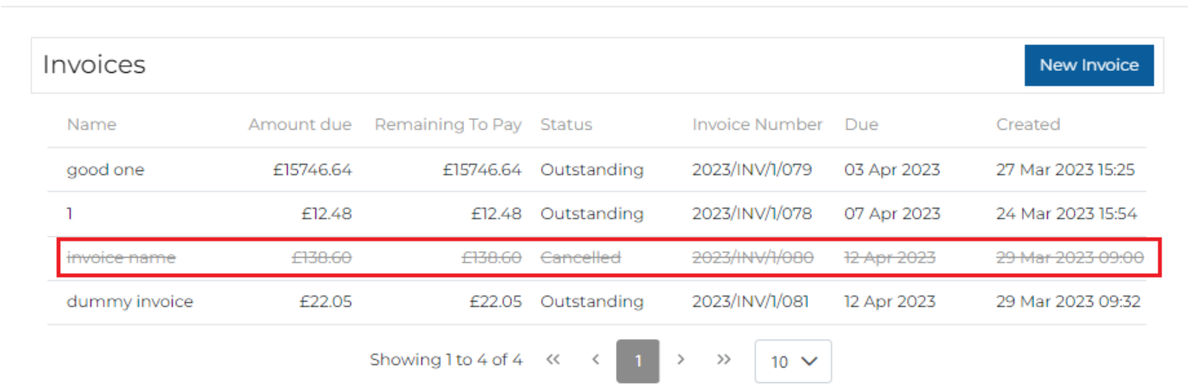

Fig.30

If the Host user would like to see details of the cancelled invoice, they can click on the invoice name and a read-only view of the invoice with pre-filled information will be displayed to the user, as illustrated in Fig.31