Booking & Payment

FOR A BETTER GAME

TRACKMAN

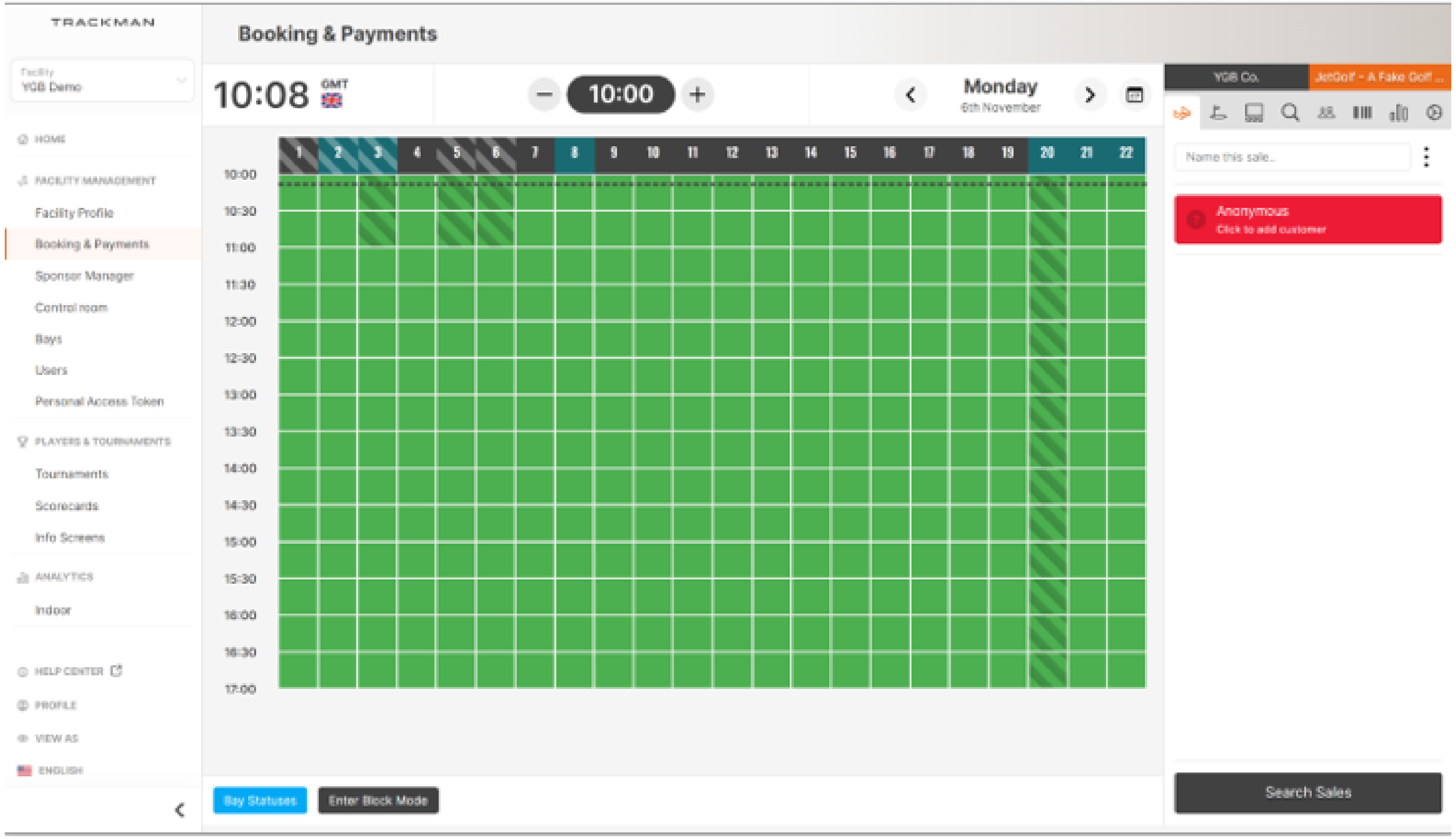
Account Access

How to access your booking & payment account using Trackman Portal

TRACKMAN

Account Access

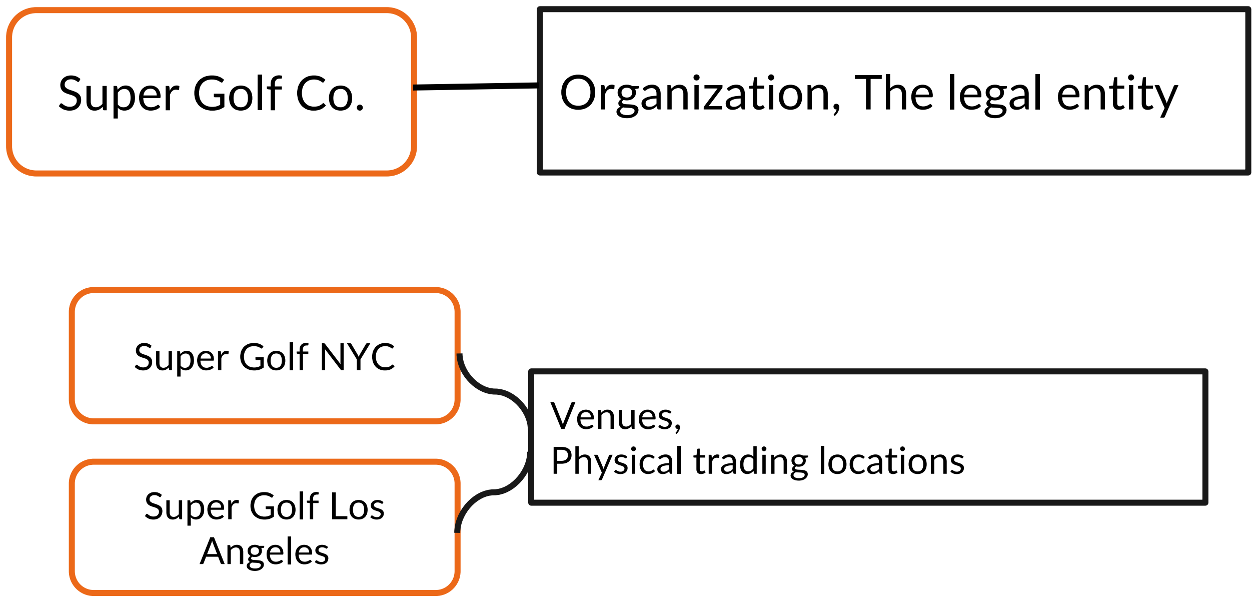
- Booking & Payments can be accessed in the Trackman Portal: https://portal.trackmangolf.com
- You can log in with your Trackman account. You'll need to have your email address verified before you can proceed, but you should get prompted to do this automatically.
- If for some reason Booking & Payments does not load for you, please contact Trackman support.



System Structure

How the different objects of the software come together

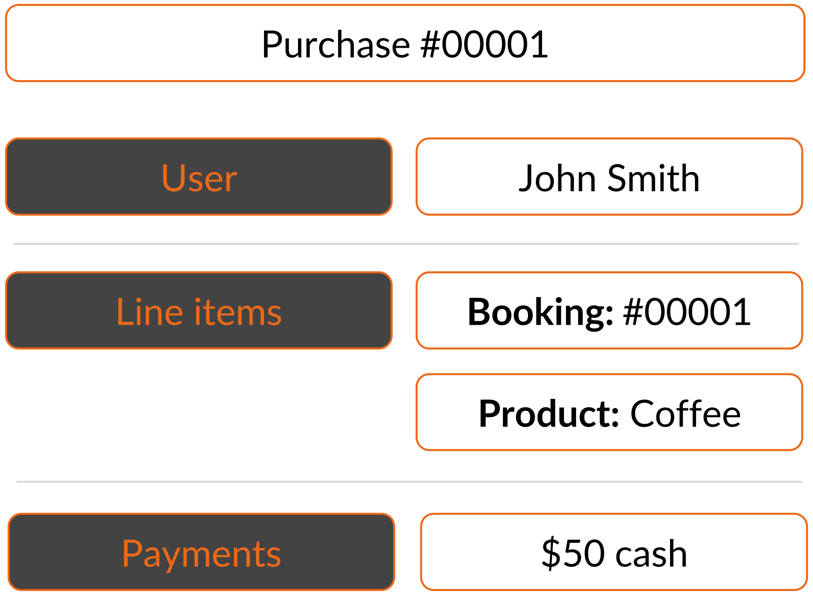
Organization Hierarchy



- The Organization is the highest-level object in YGB. This would be the company that owns your facilities.
- Venues are the physical trading locations where your customers attend and make bookings.
- Unless you're a company with multiple venues, these objects will probably have the same details.

Understanding Purchases

- Purchases are the core transactional object in the system. A purchase is linked to a specific user (customer).
- A purchase will have line items which represent the items being bought.
- Line items have different types, for example “booking”, “product”, “gift card”.
- A purchase also has “payments”. For a purchase to be “paid” its payments must be equal to the total of its line items.



Line-Item Types

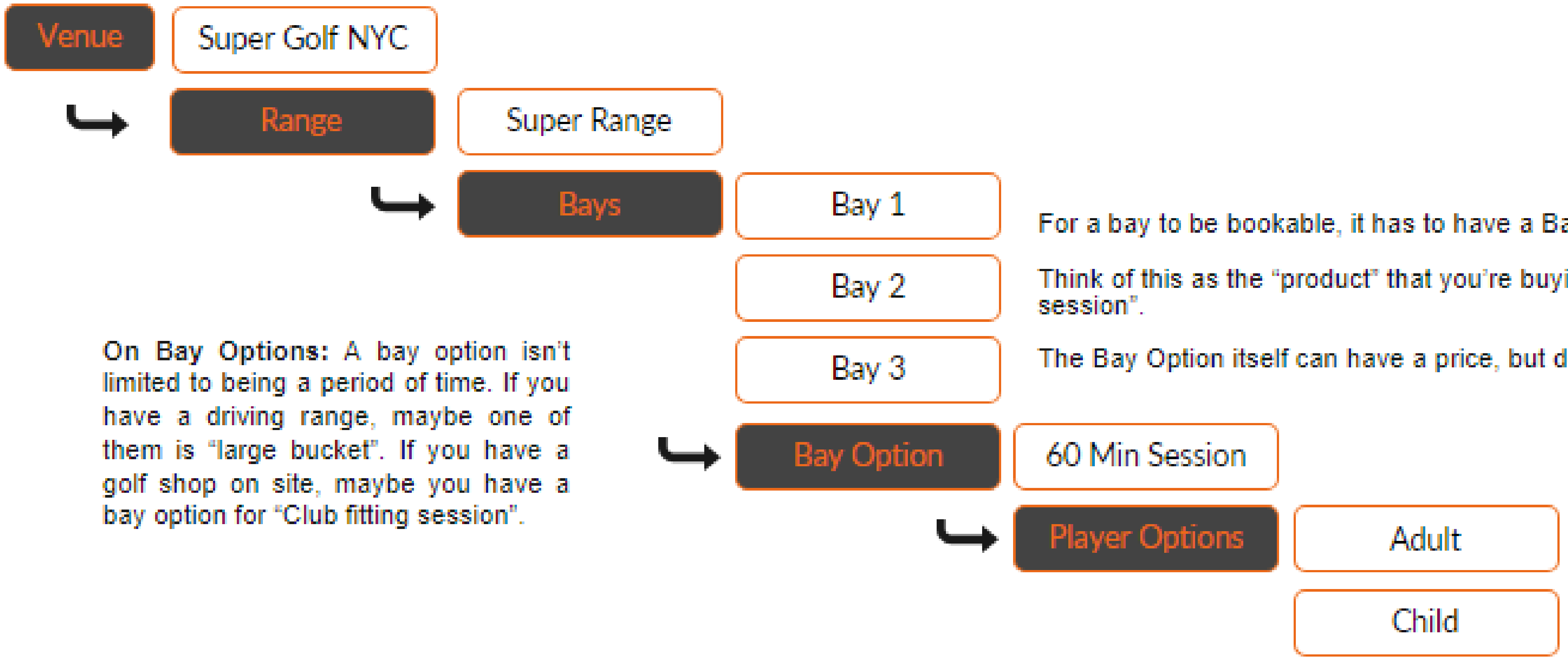
There are a few different types of line items that can be added to purchases. These are the main 4 you will interact with:

Product	Bay Booking	Course Booking	Top-up / Gift card
A fixed saleable item, like a chocolate bar, a pair of gloves or a coffee.	A booking made for a specific bay, at a specific time with a specific bay option.	A booking made on a specific course, at a specific time with a specific course option.	Prepaid credit that is either added straight to a user's account (top-up) or for sending to a friend (gift card).

Bay Booking Ecosystem

A bay booking is the kind of booking made for a driving range, or indoor simulator. It has a start/end time, and will have to take place on a specific bay. To be able to make a bay booking, we need to have a few things set up:

First is a Range. Venues have ranges, and ranges have bays. A Range is a collection of bays. A bay is a specific bookable part of your Range.



For a bay to be bookable, it has to have a Bay Option.

Think of this as the "product" that you're buying. For example "60 minute session".

The Bay Option itself can have a price, but doesn't have to.

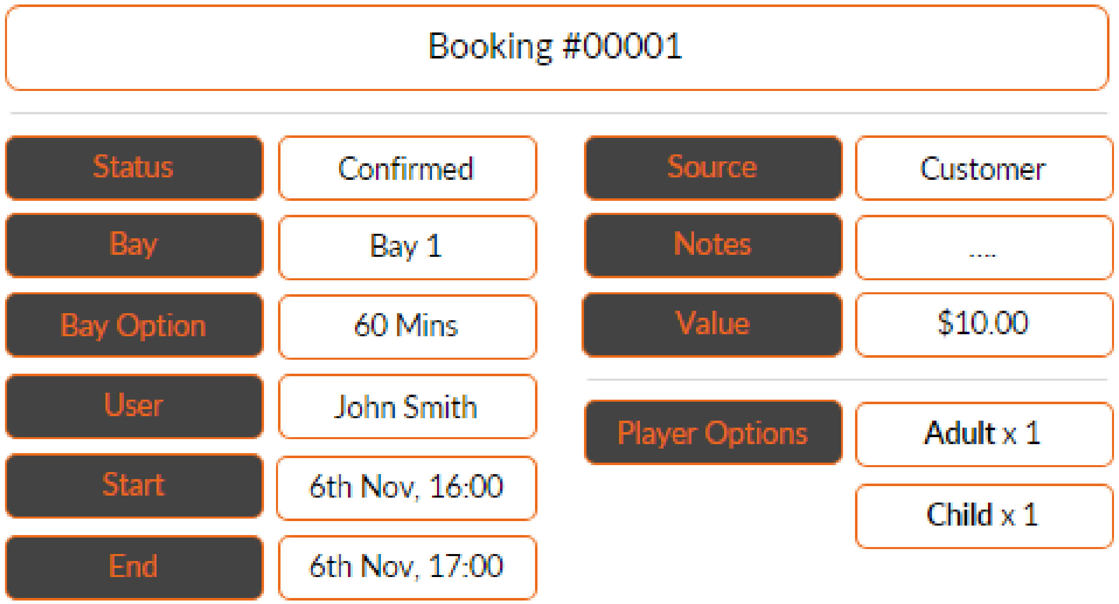
On Bay Options: A bay option isn't limited to being a period of time. If you have a driving range, maybe one of them is "large bucket". If you have a golf shop on site, maybe you have a bay option for "Club fitting session".

Likewise, for a Bay Option to be bookable it needs to have a Player Option.

Player options can also have a price if you want to charge per-head.

Bay Booking Structure

Now that we know the objects necessary to create a bay booking, let's see how they're composed.



Booking statuses can be:

- **Tentative:** The booking is in a customer's basket, but they haven't committed to it yet.
- **Confirmed:** Default state after purchasing. It's a valid booking, ready to be attended.
- **Attended:** The customer has turned up and played.
- **Canceled:** The booking is no longer on the schedule.

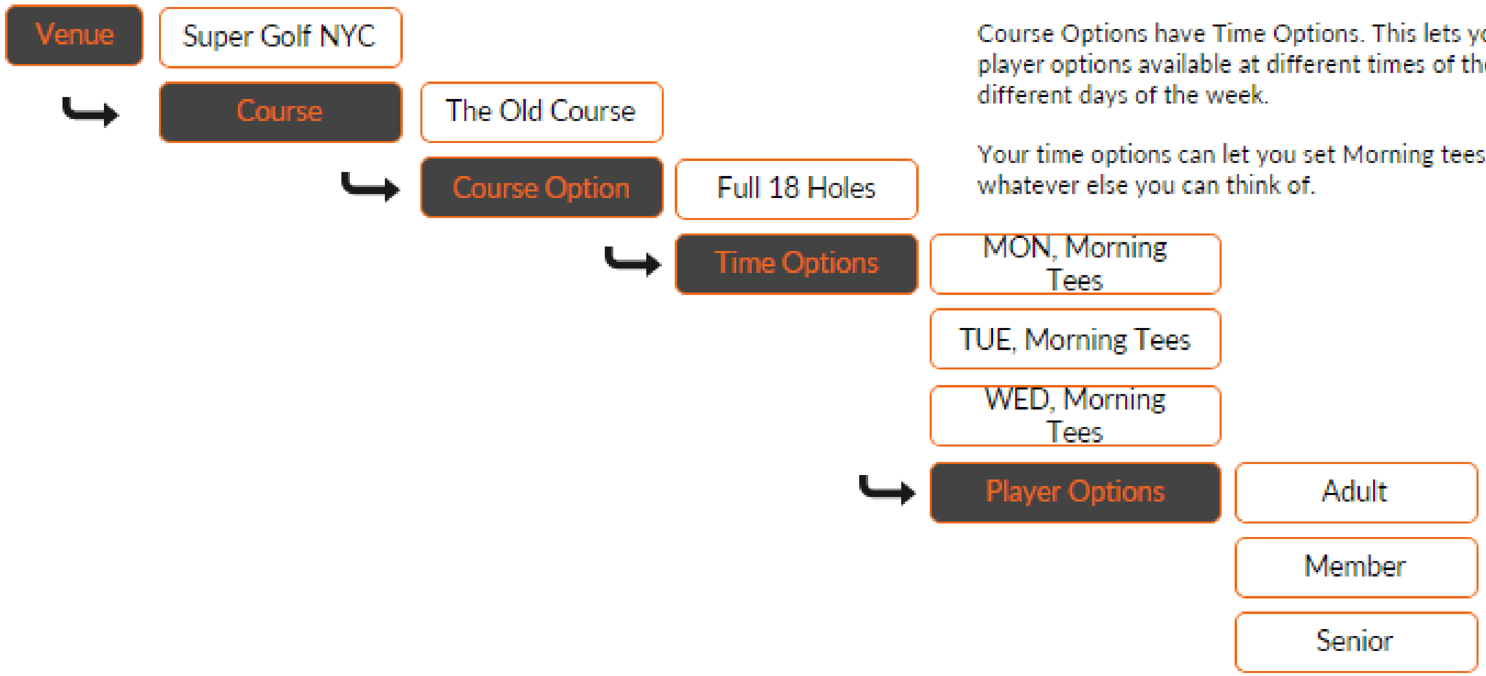
Bookings also have a "source" which is an indicator of how they were made:

- **Customer:** This booking was made directly by a customer. Generally by purchasing online.
- **Admin:** This was created by a staff member, adding items to the Admin Basket. This is most likely a walk-in or telephone booking.

Course Booking Ecosystem

A course booking is the kind of booking made for a golf course, mini golf, foot golf course etc.

First is a Course. The course is the actual tee sheet, and controls availability. For a course to be bookable, it needs a course option. To understand the difference, a Course is a physical course, while a course option is like the “product” you’re playing. “The Old Course” is a physical 18 hole course with tees every 10 minutes.
“Full 18 Holes” or “Front 9” could be the course options available to play on this course.



Course Options have Time Options. This lets you make different player options available at different times of the day, and different days of the week.

Your time options can let you set Morning tees, Twilight or whatever else you can think of.

With course bookings, the only items that have a price are your player options.

Because of the time options above, this means you can have different prices for different times of day.

Course Booking Structure

Now that we know the objects necessary to create a bay booking, let's see how they're composed.

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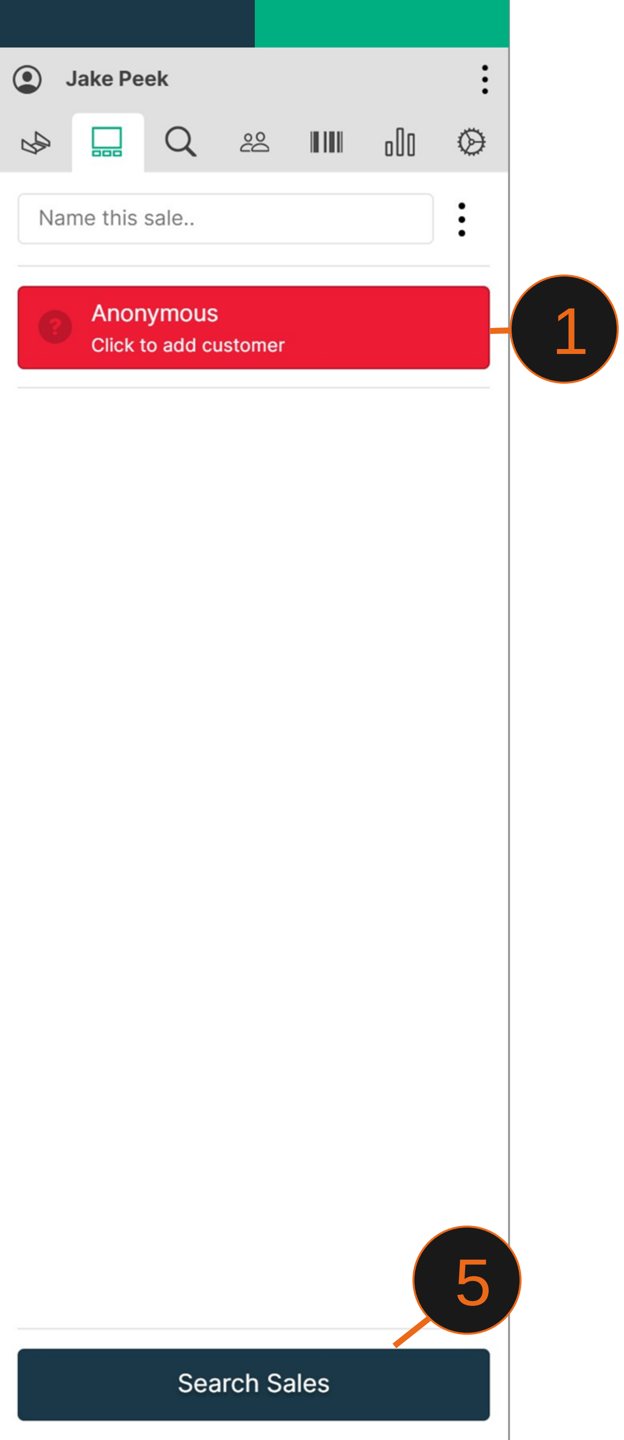
Admin Panel

Employee use only

TRACKMAN



The Admin Basket

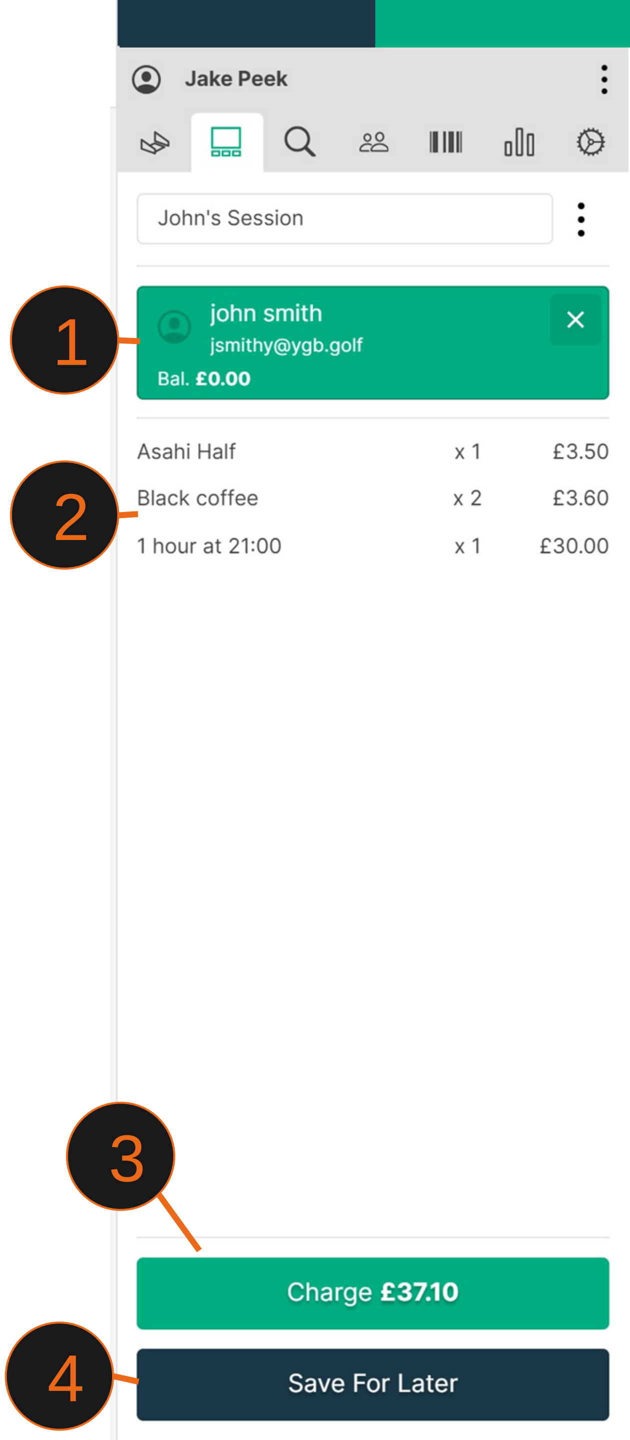
1. **Assigned Customer:** In this case, we've added a customer to the purchase - John Smith. We checked in advance that the customer's email was correct to avoid confusion. The customer that you add here will be sent a confirmation email of their purchase.

2. **Line Items:** We've added some line items to the purchase. In this case two products and a booking. Selecting a line item here will allow you to remove it or change the quantity if applicable.

3. **Charge Button:** The total of the purchase is shown here, align with the option to "charge". Charging is the act of creating a payment. We'll go over it in more detail later.

4. **Save for later:** If you don't want to take payment right away, you can save this purchase for charging later. For example if you have a drinks tab running, or just want to have your customers pay at the end of their session.

5. **Search Sales:** Here you can retrieve your saved purchases and quickly see any that need action. This is an important part of the day to day usage of the system and will be covered in more depth later.



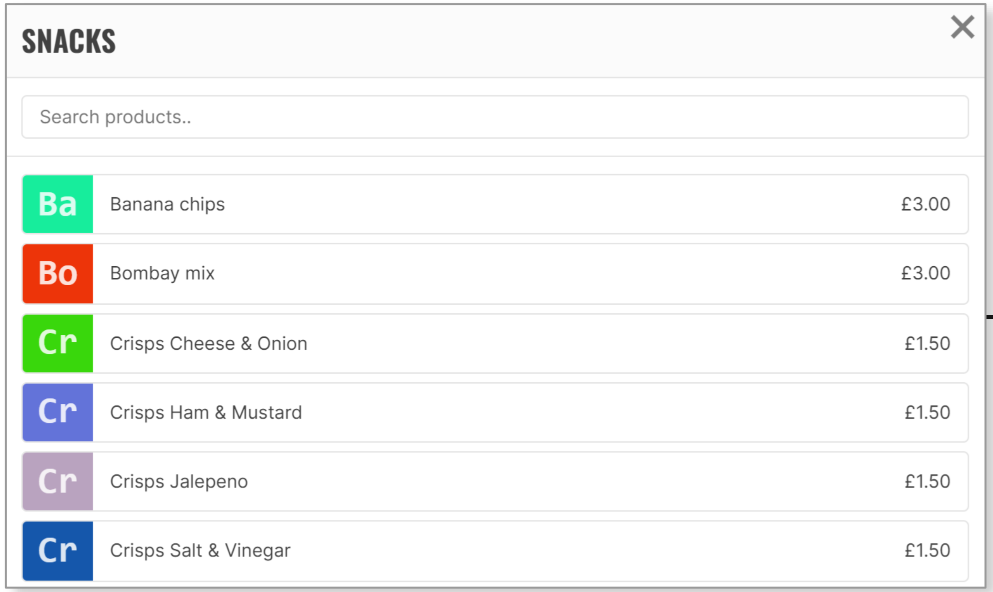
Point of Sale

Point of Sale (POS) is where you can sell Products to customers. A product is a fixed, simple item. Products are arranged on a grid called a Layout. If you want to learn how to set up new products, we'll cover that later. If you want to skip ahead, go here.

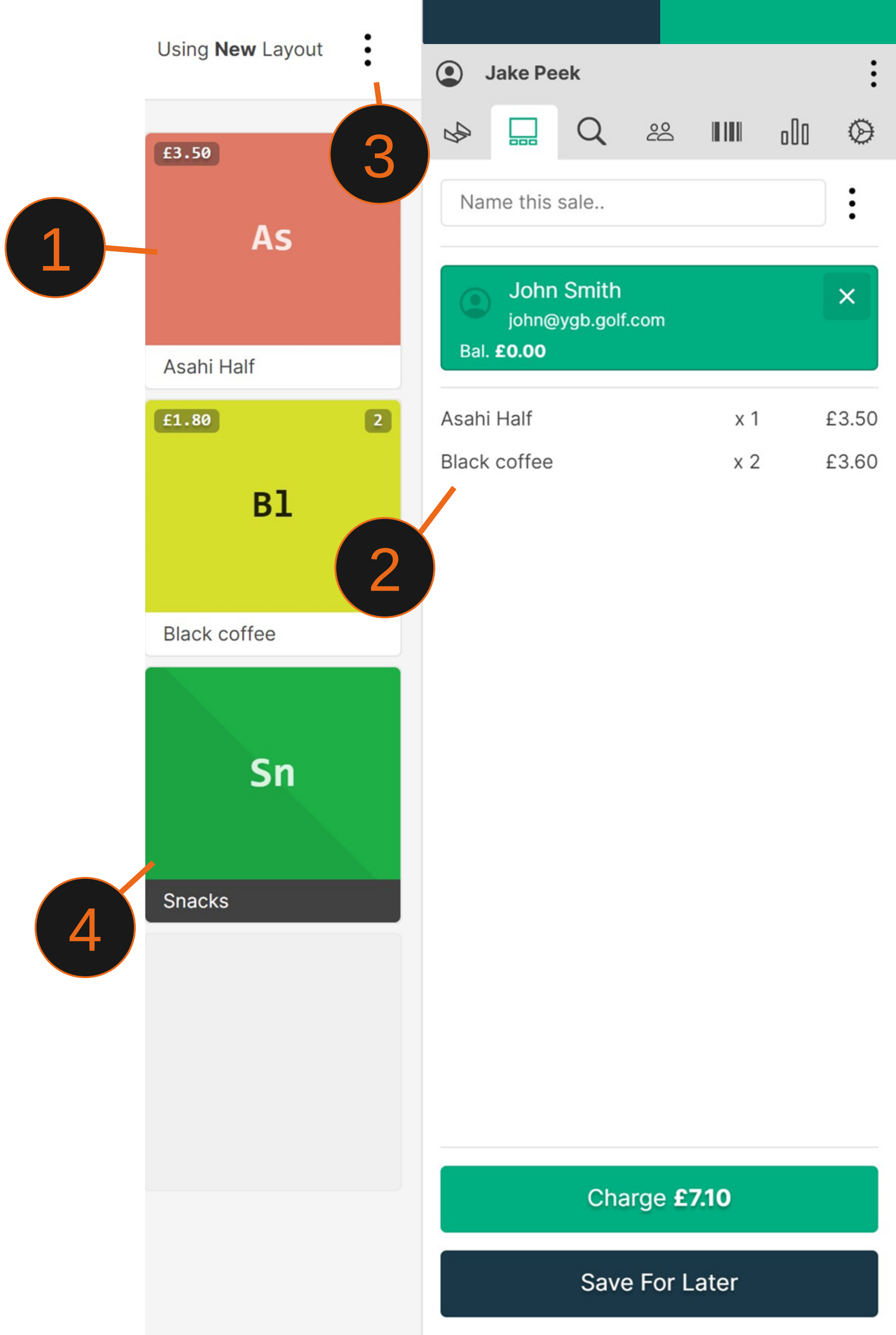
1. A POS product tile. Tap it to add the product to the current Admin Basket.

2. The currently added line items in the Admin Basket. In this case, two products.

3. Here you can edit the current layout, or even create new ones. For example, you may want two layouts "Café" and "Driving Range".



4. A Category type tile. This tile is an alias for several products, and will launch a browser when selected.



Creating a Bay Booking

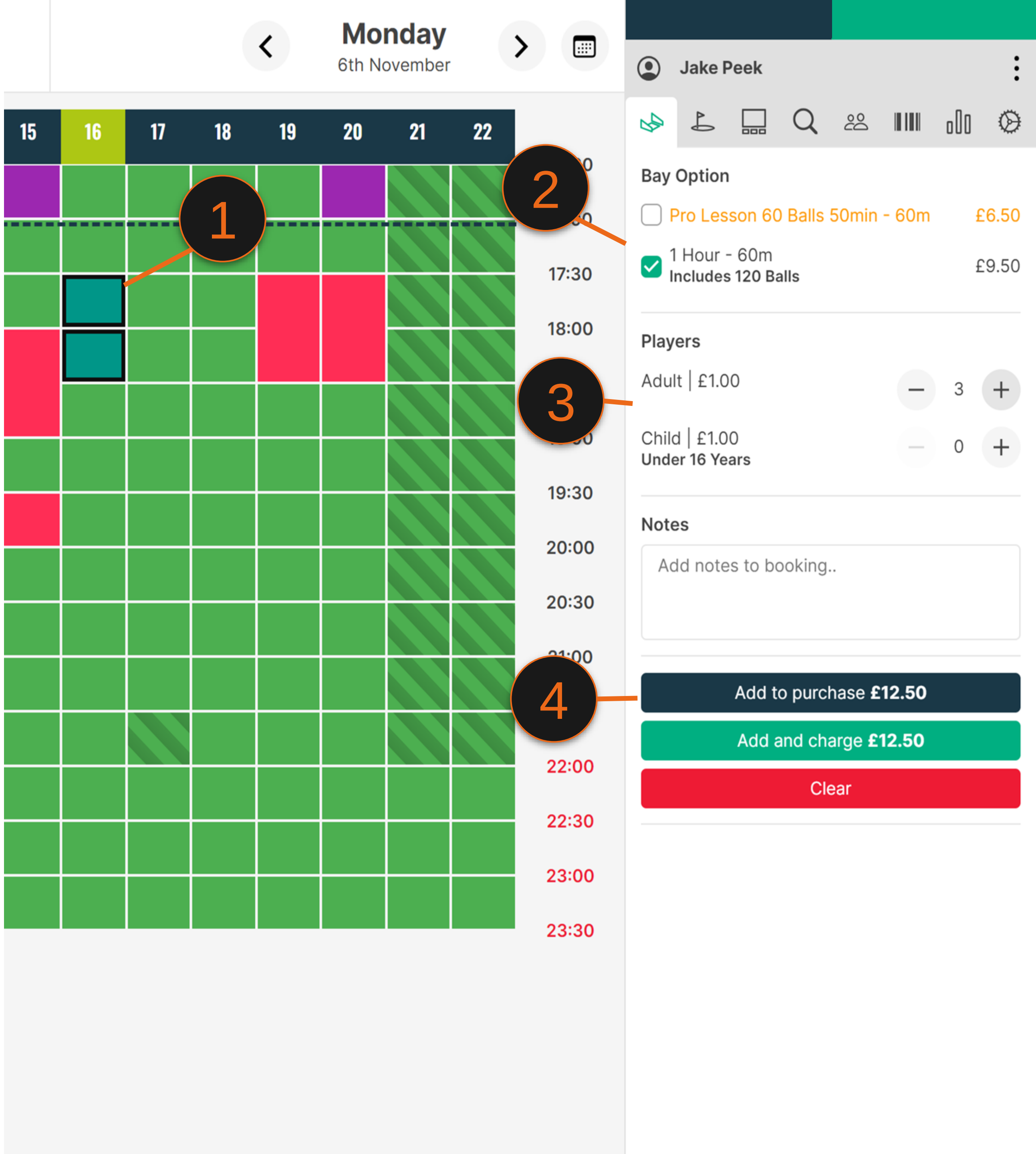
1. **Selecting Slots**
   On this venue, every square is a 30 minute block of time - tap the slots you want to create a booking on. Because two slots have been selected, only the 60 minute bay options will be available to select in step 2.

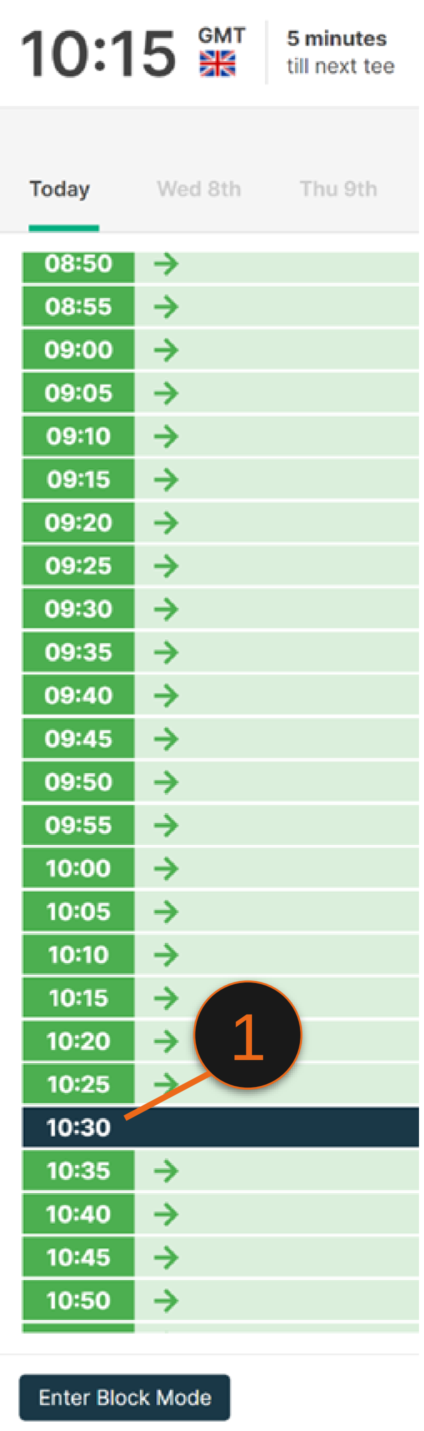
2. **Adding the Bay Option**
   Select the bay option you'd like to sell. There is also a gold option shown - this is an "admin only" option, meaning customers can't book it themselves.
   You may also see a button to "show restricted options". This is a more advanced topic, but if you have rules hiding certain options you will be able to override it here.

3. **Adding the Player Options**
   Selecting the player options is done with the + and - buttons. There always has to be at least one person playing.

4. **Add to purchase / Add and Charge**
   "Add to purchase" will add the booking you're making to the current Admin Basket.

   "Add and charge" will immediately charge the booking you have just made, along with anything else already in the Admin Basket. It helps to save clicks if you're only selling one booking.





Creating a Course Booking

1. **Selecting Tee times:** On this venue, the course interval is 5, so a tee time is generated every 5 minutes. Select any available tee time to start the booking process.

2. **Course Option:** Select the course option you'd like to sell. Remember that the course option is **how** you'd like to play. In this case, it's a 9 hole course but you can choose to replay/loop and play a full 18.

3. **Other start times:** Because we selected a course option with replays/loops, we're being asked to select the second tee time. If we'd selected the 9 hole course option, we wouldn't have to select any other tee times.

4. **Player Options:** Here we select our player options. For course bookings, this is the main object that affects the price. You'll notice there's an option to show restricted player options. This will show player options that wouldn't be available normally for customers, but as a staff member you can still select them.

5. **Add to purchase / Add and Charge**
   "Add to purchase" will add the booking you're making to the current Admin Basket.

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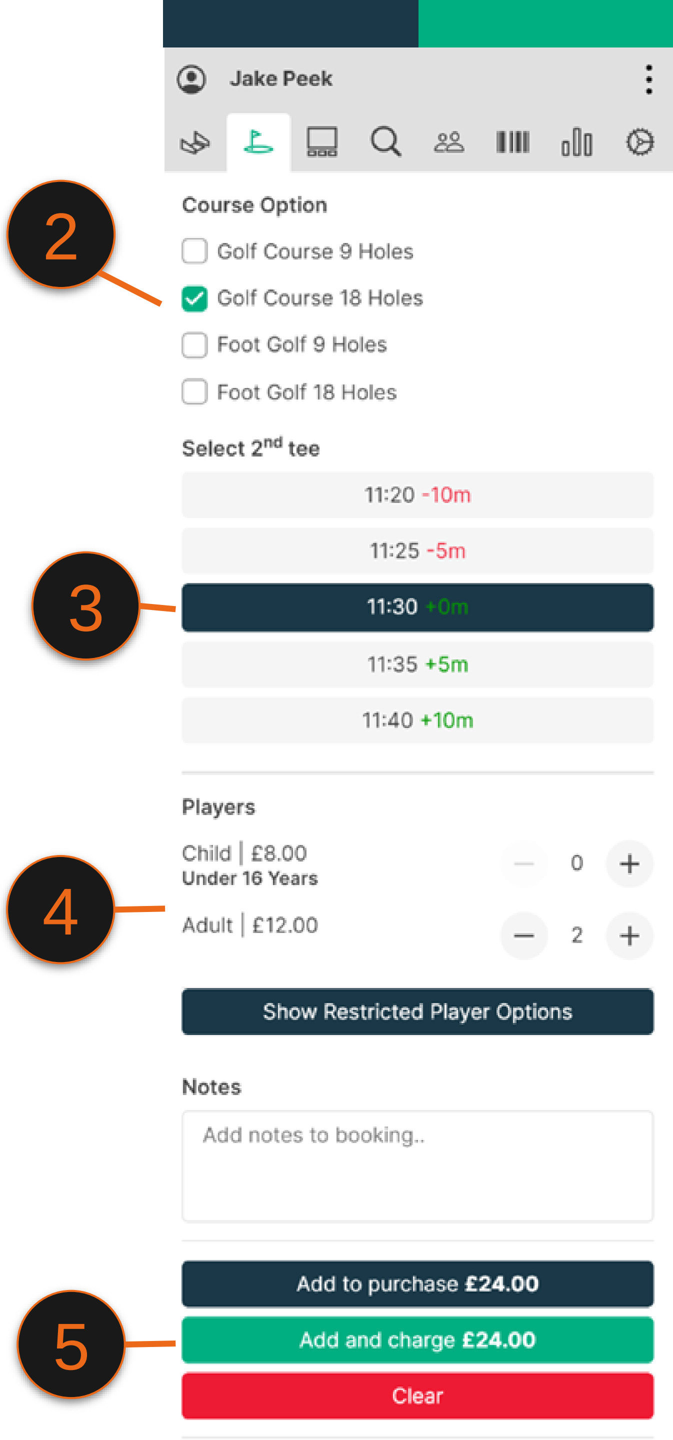
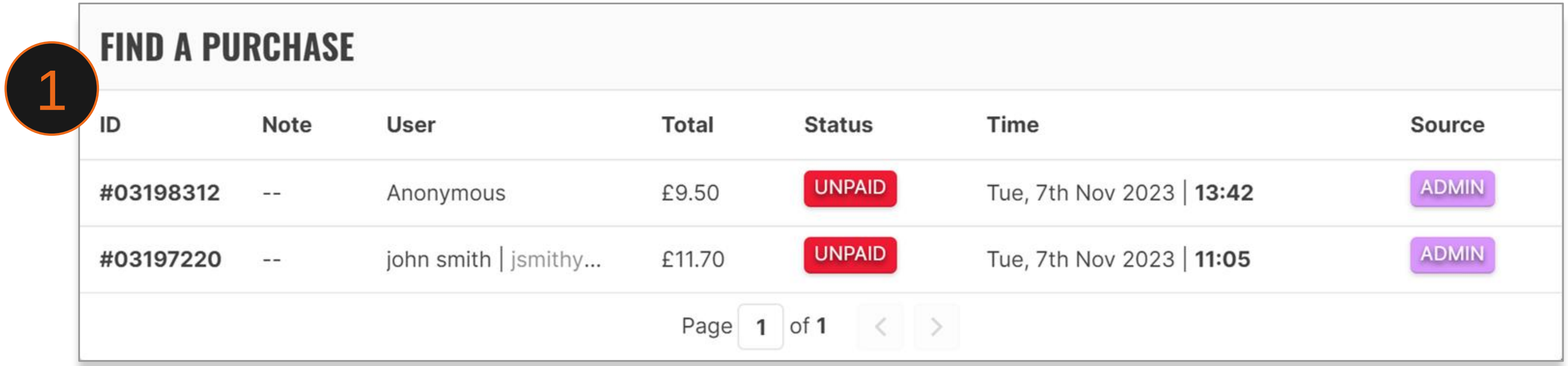
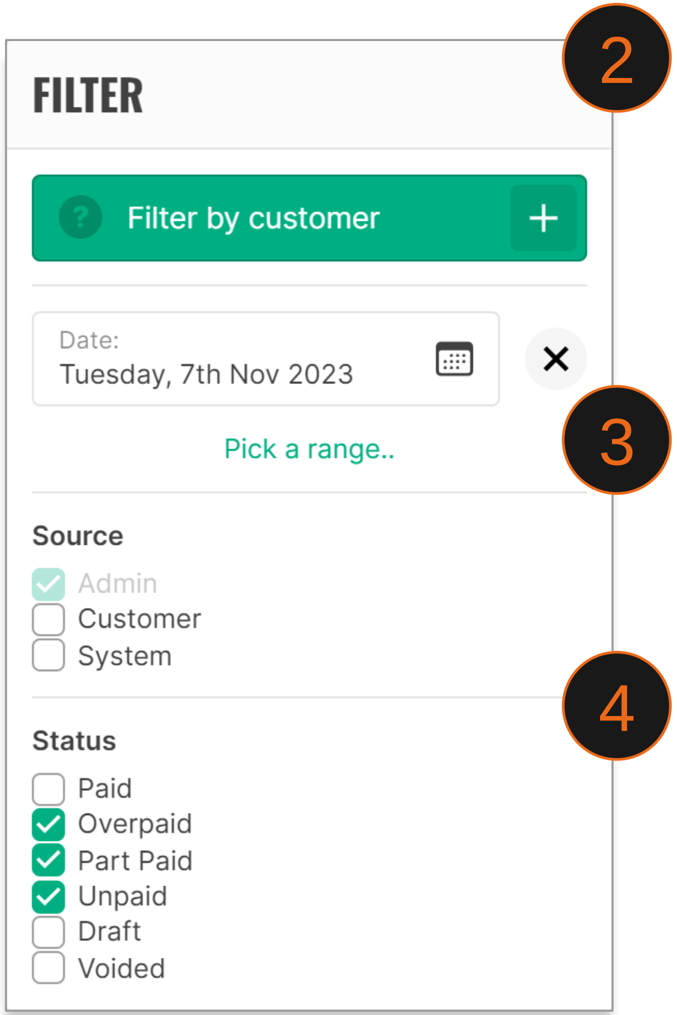


Searching & Managing Open Purchases

Tapping “Search Sales” from any Admin Basket will bring up the purchase finder. By default this will show any purchases that need action for today. For example anything unpaid, part paid or overpaid. Your main role day to day is to balance any purchases sitting in this list. It’s good practice to regularly tap “search sales” and review the purchases shown.





1. The purchase list. Clicking on any purchase here will load that purchase into the current Admin Basket.

2. Here you can filter the purchases shown to you. Shown at the moment are the default filters. Any time you re-open the purchase finder the default filters will be re-applied.

3. Here you can choose a date or date range to look for purchases on.

4. With these checkboxes, purchases can be filtered by their status or source. This is a good way to also look through recently paid purchases.

The Booking Editor

If you open up a booking from either a range or course view, you'll get presented with the Booking Editor. The editor is slightly different depending on whether it's a course booking or a bay booking, however the difference is fairly minimal.

It's a tool you'll use a lot operationally, so we'll go over a few things here:

Customer: The currently assigned customer. This cannot be changed after making a purchase. It will also show any current balance or memberships the customer has.

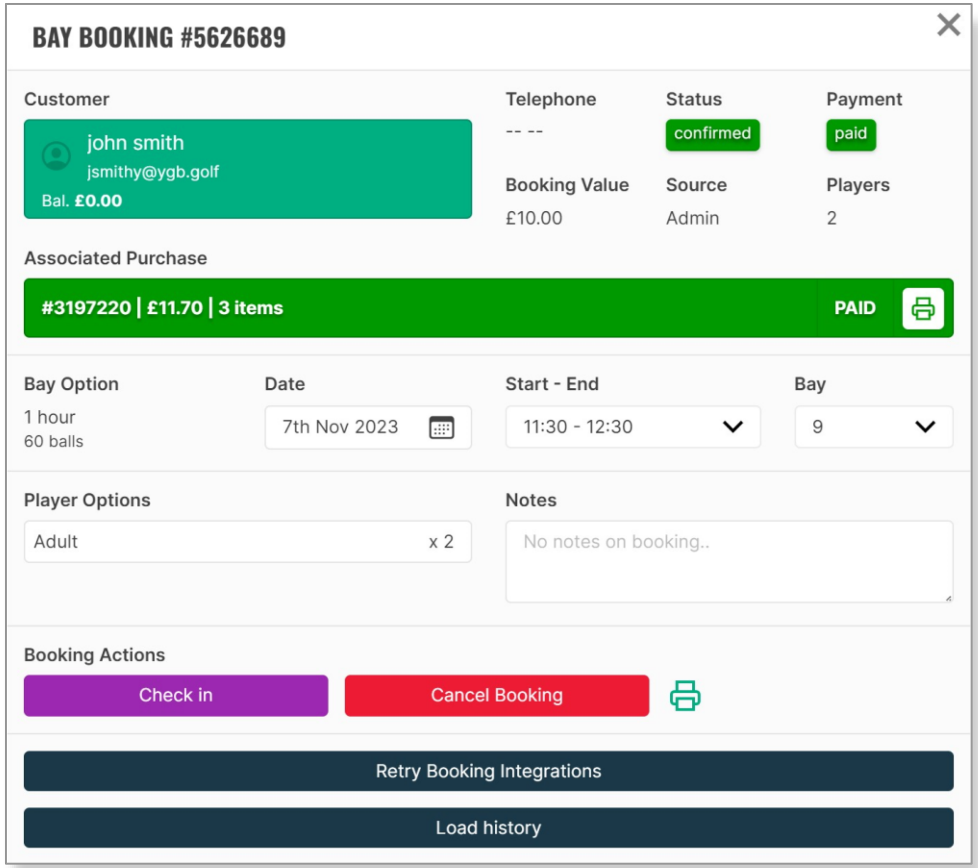
Associated Purchase: This allows you to access the purchase that this booking was made as a part of. Tapping the left hand part of this widget will open the purchase, tapping the payment status will open the charger.

Moving a booking: Depending on the booking type (course or bay), you will have different settings for moving a booking. In the case of this bay booking, you can change the date, start time and bay. Change the values, and a button will appear to save your changes.

Booking Actions: Here we have some common use actions. "Check in" will set the booking to "attended". This is good for reporting and general visibility. Some integrations will do this for you automatically.

"Cancel booking" will set the booking to cancelled - this cannot be undone. It will remove the booking from the schedule, but the booking is still liable for payment. If you want to refund an item, you'll need to do something to the Purchase. We'll go over this in more detail later.

Retry Booking Integrations: If you have other systems integrated and you notice that they haven't been executed, you can press this button to re-attempt the integration.



The Purchase Editor

Fully opening a purchase will present you with the Purchase Editor. Here you can see all the items purchased by the customer, as well as access a few other useful functions.

1. **Line items:** The list of line items added to the purchase. In this case, a single booking. For more complex line items like bookings, a few properties will be displayed for convenience. In this case “start”, “bay” etc.

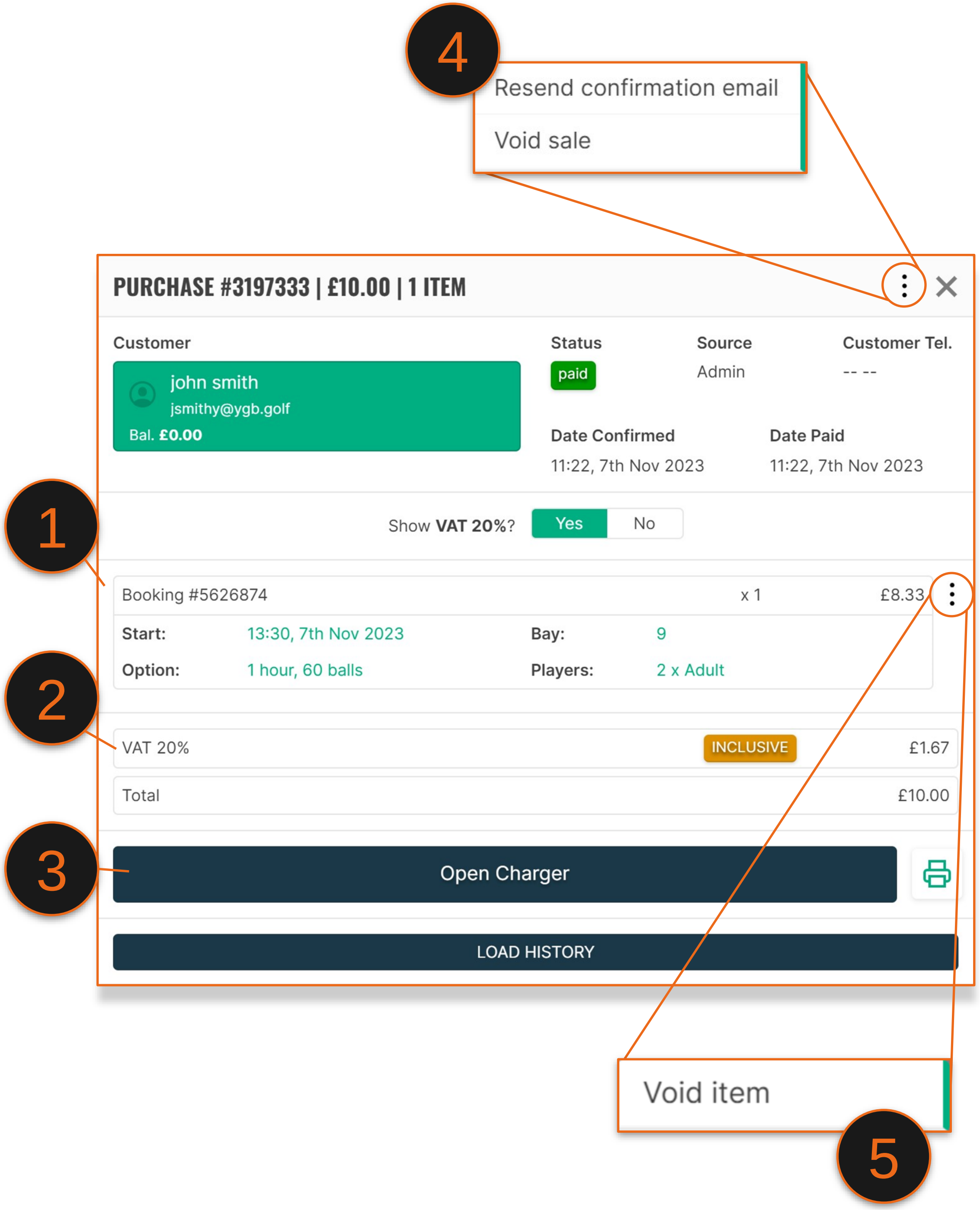
2. **Taxes:** Any taxes applied to items in this purchase will be shown here. There will also be a switch above the line items that lets you show or hide any inclusive taxes - in this case inclusive VAT of 20%. We will cover managing taxes later.

3. **Charger:** This lets you access the charger and view the payments currently made against this purchase. We’ll cover the charger in more detail later.

4. **Purchase actions:**
   Resending a confirmation email is useful if your customer did not receive their initial confirmation, or if you have made a change to their purchase and you want to update them. For example if you moved a booking.

   Voiding a sale is the same as voiding all items as shown in [5], but is quicker than voiding each separately. Voiding a line item means it is no longer liable for payment, essentially reducing the total of the purchase.

5. **Void item:** As mentioned above, this will void one specific item. In the case of a booking, voiding will also cancel the associated booking.



Charging

The Charger is how payments are made from the Admin Panel. Remember that a purchase will transition in status when its payments change.

Depending on the charge type you select, you may see some additional settings. For example, if you select a physical “terminal” charge type, the system will ask you which terminal you’d like to use.

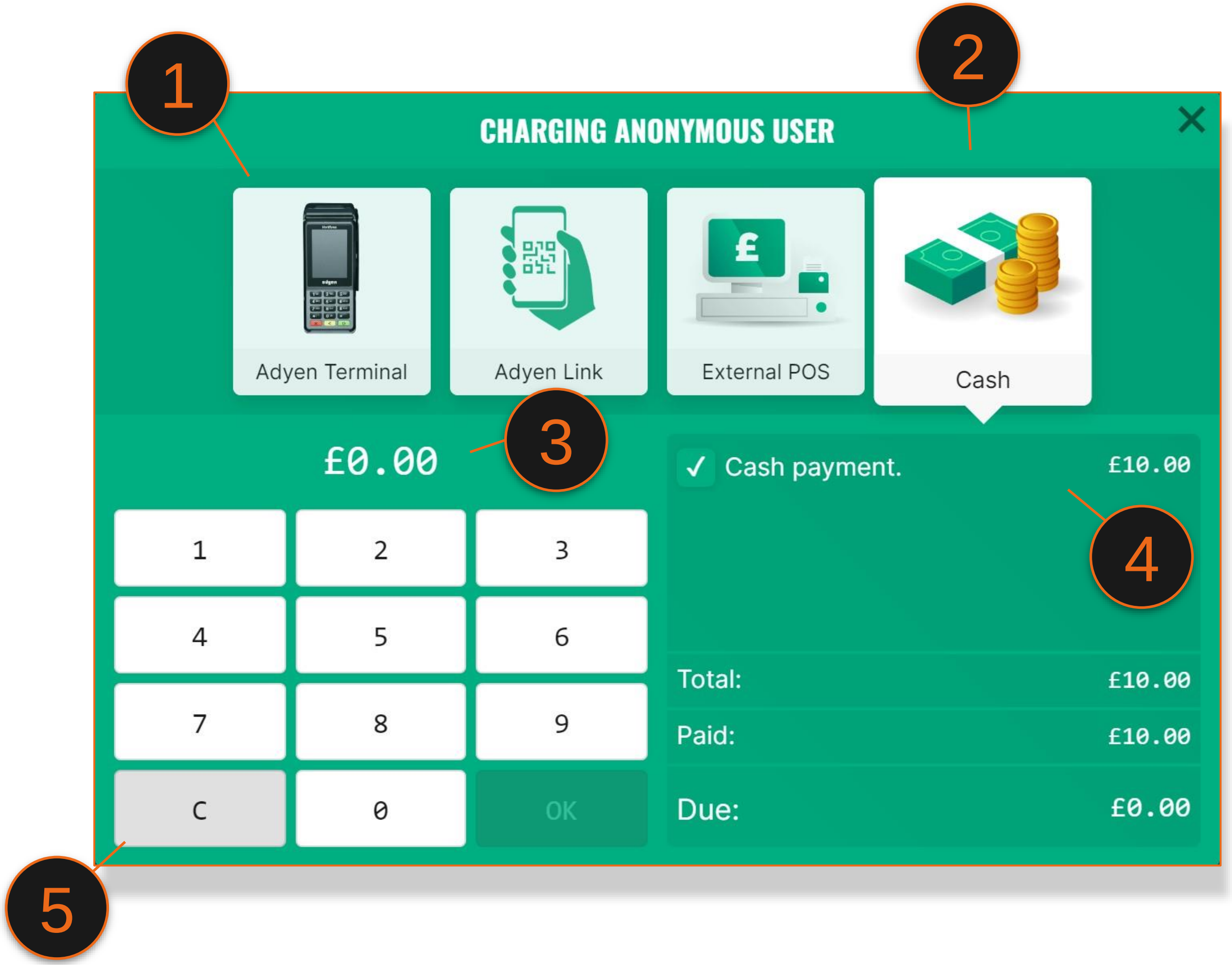
1. The available “charge types”. A charge type is a way of making a payment. The available methods will be different depending on the context.

2. The currently selected charge type. In this case, cash. An external method.

3. The total you are about to charge.

4. The list of already created payments. In this case a single cash payment for £10. Tapping on one of these payments will start the process of refunding it. See the next slide.

5. “Clear” button. This is used if you’d like to charge a different amount than the recommended. This is normally done if you’d like to split a payment between two customers, but could be for all kinds of reasons.



Refunding

The natural counterpart to charging. Refunds must be done on a specific payment. The charge types available when refunding will depend on the source payment that you selected.

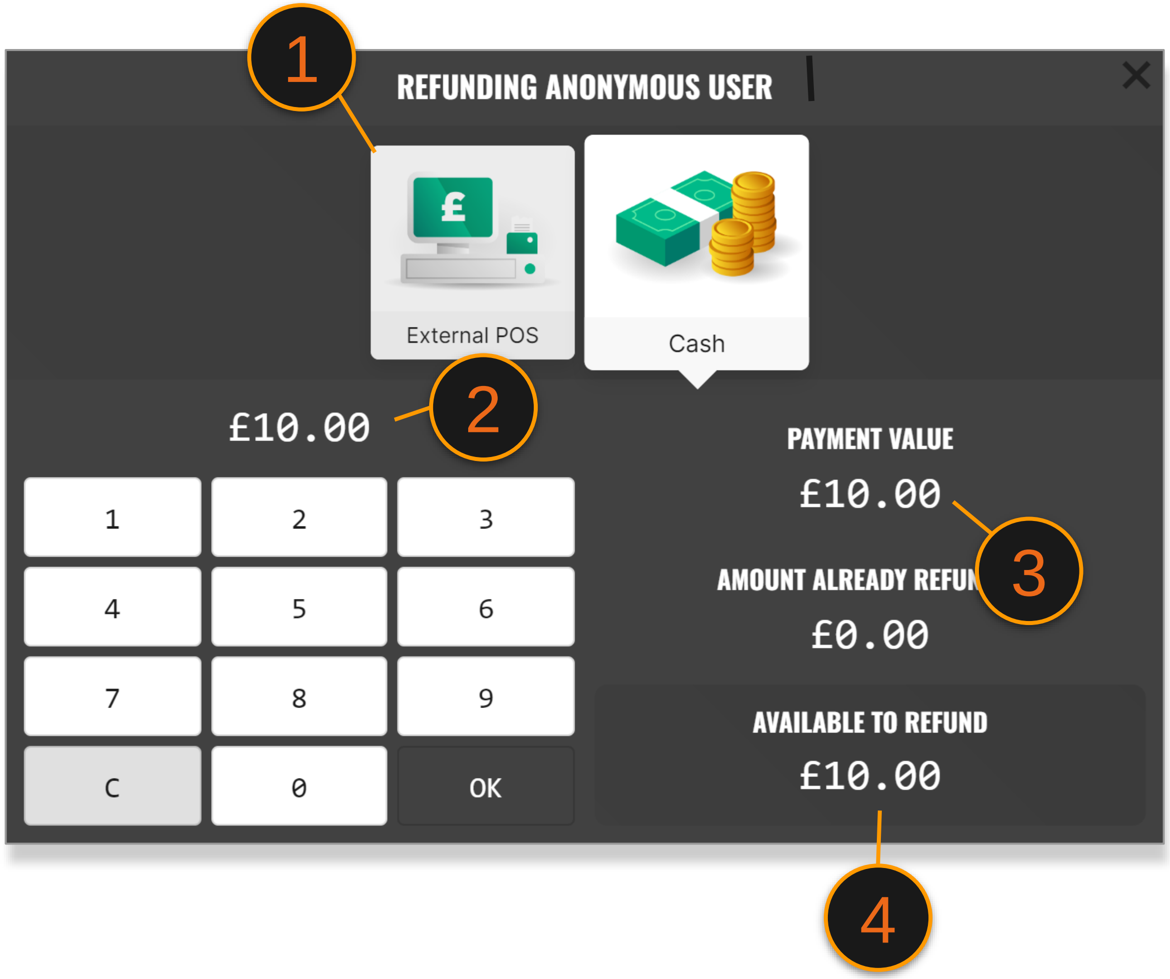
Refunding also creates a payment, but one with a negative value.

1. The available and selected “charge types”. In this case, cash. You may see different methods here than in the charger. For example if a customer makes a card payment at checkout, there will likely be an option to refund back to their original payment method.

2. The total you are about to refund. Like payments, you can change this value and perform a part-refund of a payment.

3. The value of the original payment that you’re refunding.

4. The total available to refund, which is generally the payment value, minus any already processed refunds.



Management

Customer Database

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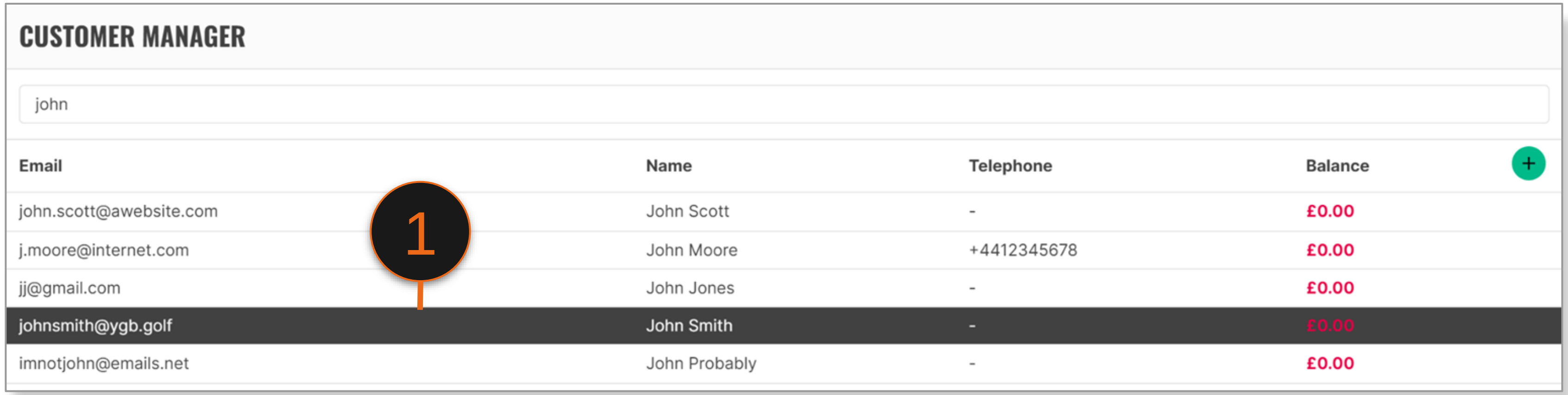
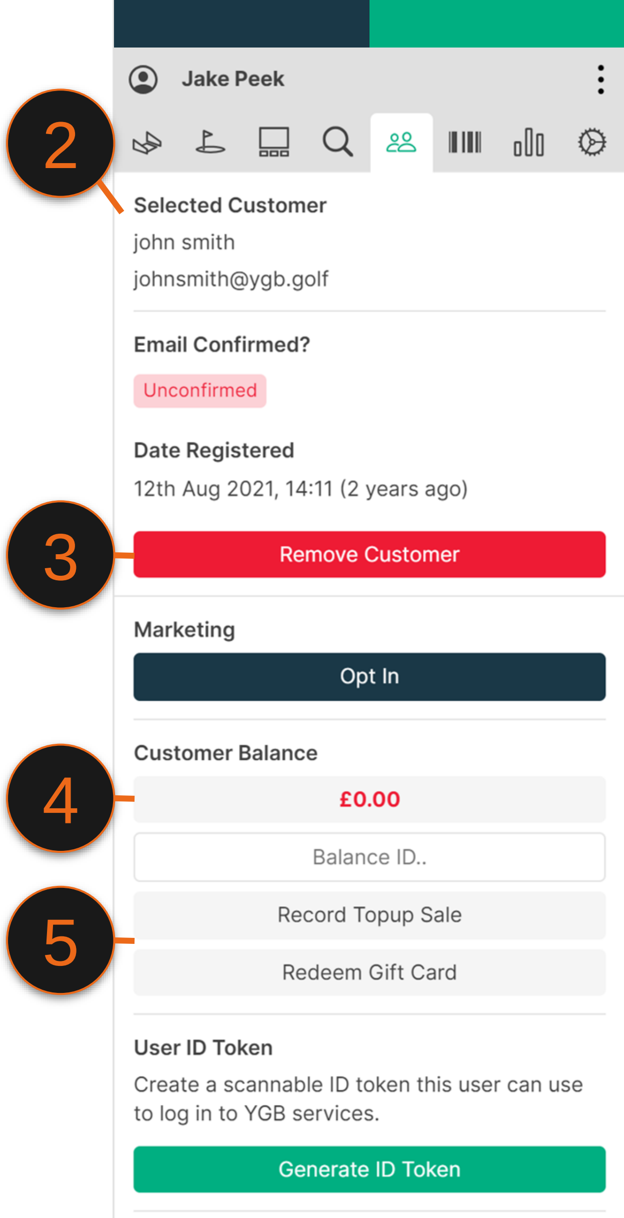
Customer Search

Going over to the customers tab will show you the full list of customers that have booked at your venue. This is why we recommend always adding a customer when creating a booking. It will help you populate a powerful customer database.





1. Here you'll see the list of customers. It will allow you to search by customer name/email/telephone. On this view you can see we have a customer selected.
2. The selected customer appears in the sidebar and will give you some basic information about them.
3. If necessary, you can remove a customer from your venue. This will unlink them, and they will no longer appear when you search for them. This will however not remove their account on the platform - they will still have access to see all of their previous bookings, and they can always re-attend your venue if they wish.
4. Here you can see the customer's balance. Think of this as like credit on your venue. If you tap this box, it will allow you to manually amend their balance. We'll cover customer balances in more detail.
5. Here you can sell a topup or gift card to the selected customer. This is the proper way to amend someone's balance, because it will create a purchase which can be reported on.

Creating & Exporting Customers

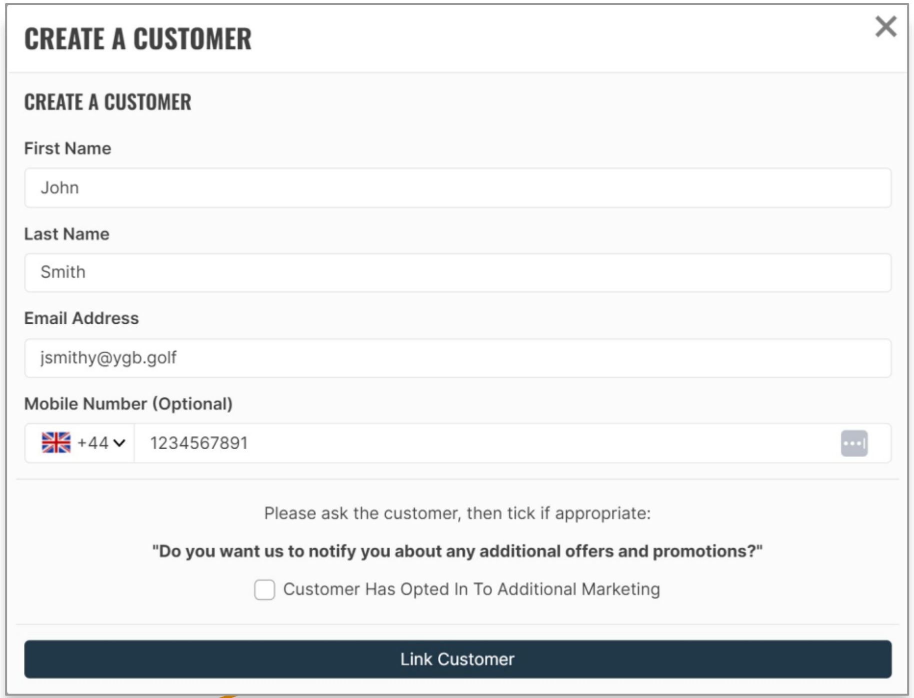
Adding a customer can be done by using the button shown below from the customer search, or from the customer selector on the Admin Basket.

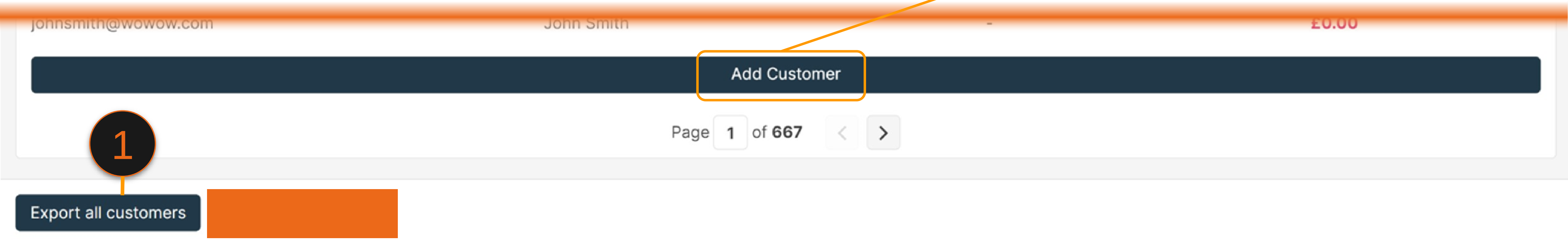
The customer creator requires only a first name, last name and email. However if you can collect a phone number as well, that's even better.

If you add a customer that already has an account on the platform, don't worry, you won't create a duplicate - the two accounts will be joined together. Users are unique by their email address. Make sure to correctly enter email addresses - customers will receive an email to ask them to confirm their account.

1. Here you can export your complete customer list. We will also include some convenience properties like their balance and the number of bookings they've made.

   Make sure you follow local laws on the use of this data. We will include on the list whether they have opted in to additional marketing.





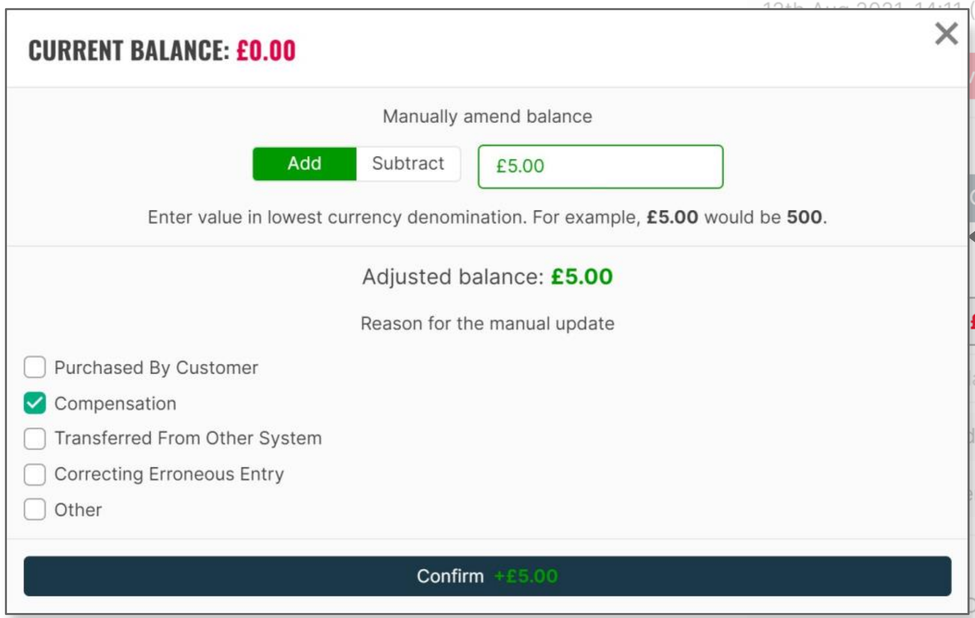
Customer Balances

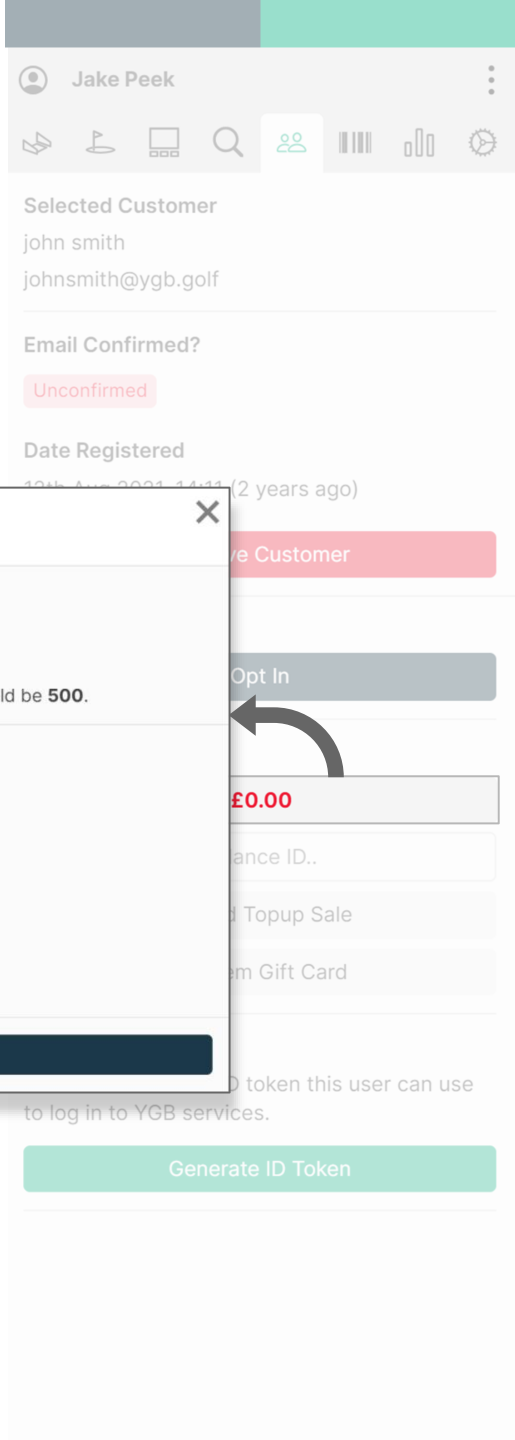
A customer can have a balance with your venue. Balances are like credit - they essentially give the customer a monetary value that they can use at checkout, or that you as a staff member can use to create a payment.

As a venue, you decide what you'd like customers to be able to spend their credit on. A common setup is to allow customers to use credit for bookings, but not for products. The decision however is up to you.

If you ever need to manually amend someone's balance, you can do so as shown on the right.

You will have to provide a reason, and this feature would normally be restricted to only certain types of user on your platform. For example, "Finance" users.





One of the main ways that customers can end up with a balance at your venue is through refunds. If you choose to refund a customer to "YGB Balance" as the charge type, then they will receive that amount on their balance.

This is a great alternative to returning their funds. You make it much more likely that the customer will return, and you aren't charged twice for processing fees.

Management

Venue Settings

Range Opening hours

One of the first things to configure is the opening hours of your Range/Indoor facility. Head over to **Settings > Range > Opening Hours.**

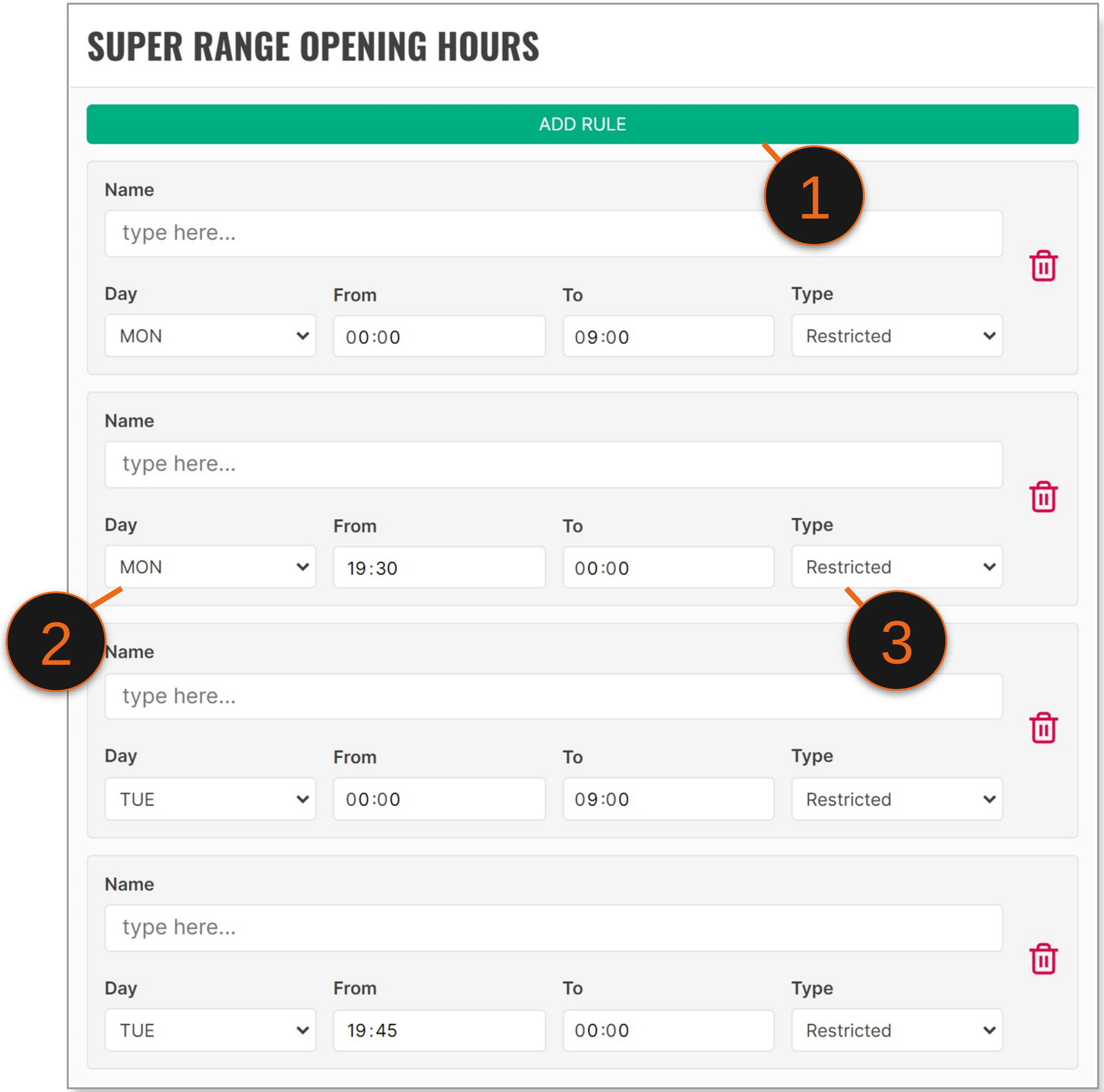
By default and unless told otherwise, your venue is always open, and you can use this utility to save when it isn't. The reason for this is it makes it easier if your opening hours have to go past midnight.

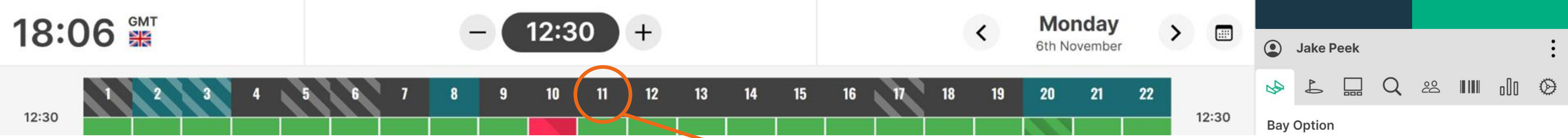
1. Use this button to add another rule to the stack. You can add multiple entries per day. You can also name the entries if desired, but it isn't mandatory.

2. Select the day of week, the from time and the to time. If you set the "from time" to 00:00, it will be the beginning of the day. If you set the "to time" to 00:00 it will be the end of the day.

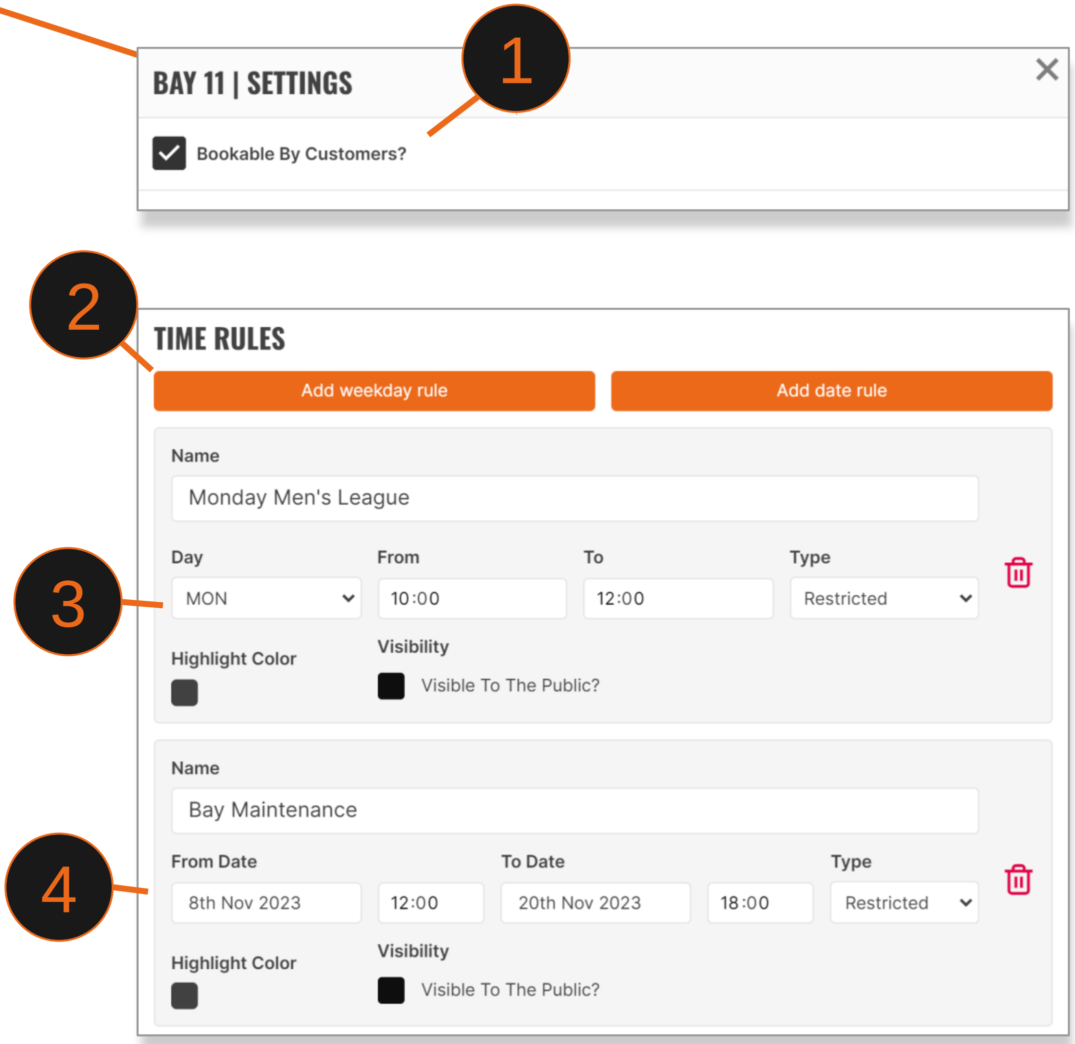
3. If your facility behaves as mentioned above, where it is always open, then you will always want to set the type to "Restricted".

Bear in mind that these opening hours are not the only way to prevent or allow customers to book, and other restrictions such as time rules on bays could also affect whether a customer can book.





Bay Time Rules



Here we can alter settings on when bays can be booked. Select a bay on the Range view as shown above to access the settings for that bay.

1. **Bookable by customers**?
   Unticking this box will make the bay not bookable by customers online. It will however still be bookable by staff. This can be useful if some of your bays are permanently reserved for teaching or walk-ins.

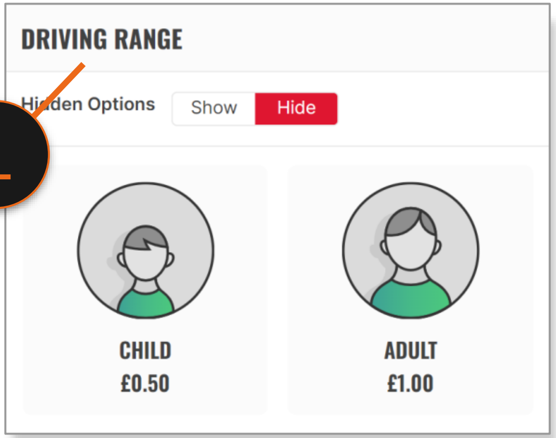
2. **Create a new rule:** Tap here to add a new rule to the bay.

3. **Weekday rule:** If the facility needs a certain time slot in the bay that needs to be restricted for every day each week. (Monday Men's League).

4. **Date rule:** If the bay needs to be closed or restricted to being book due to maintenance, or other reasons, for an extended period of time (ex: week, month, year long)

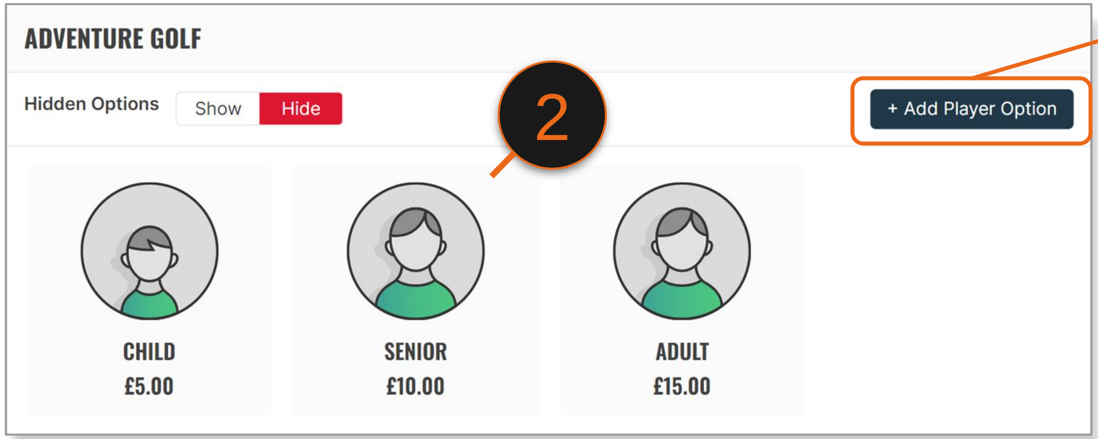
Managing Player Options

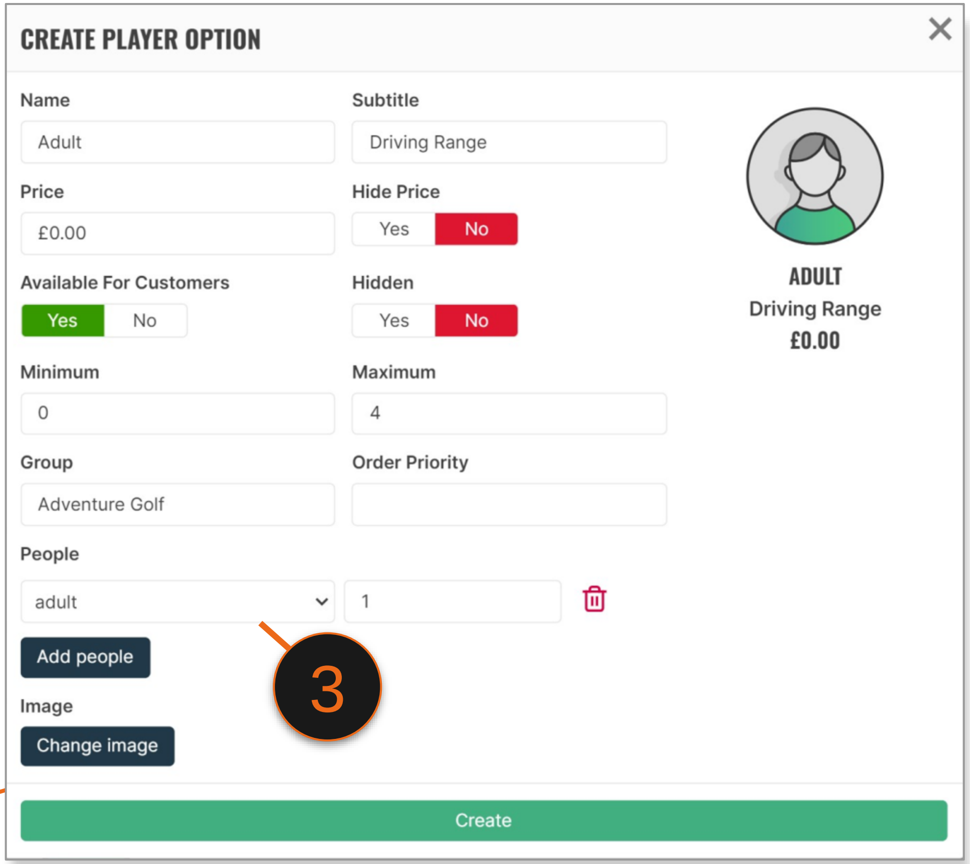
Whether a player option is used for a range or a course, they are managed in the same place. You can even re-use them for multiple things. Head to Settings > Player options to start configuring them.



1. This is a group. We recommend putting player options into groups for ease of finding and managing them. Putting an option in a group is easy, just modify its “group” property.

2. This is a player option tile. The way it appears here is also how it will appear to customers on your booking pages.





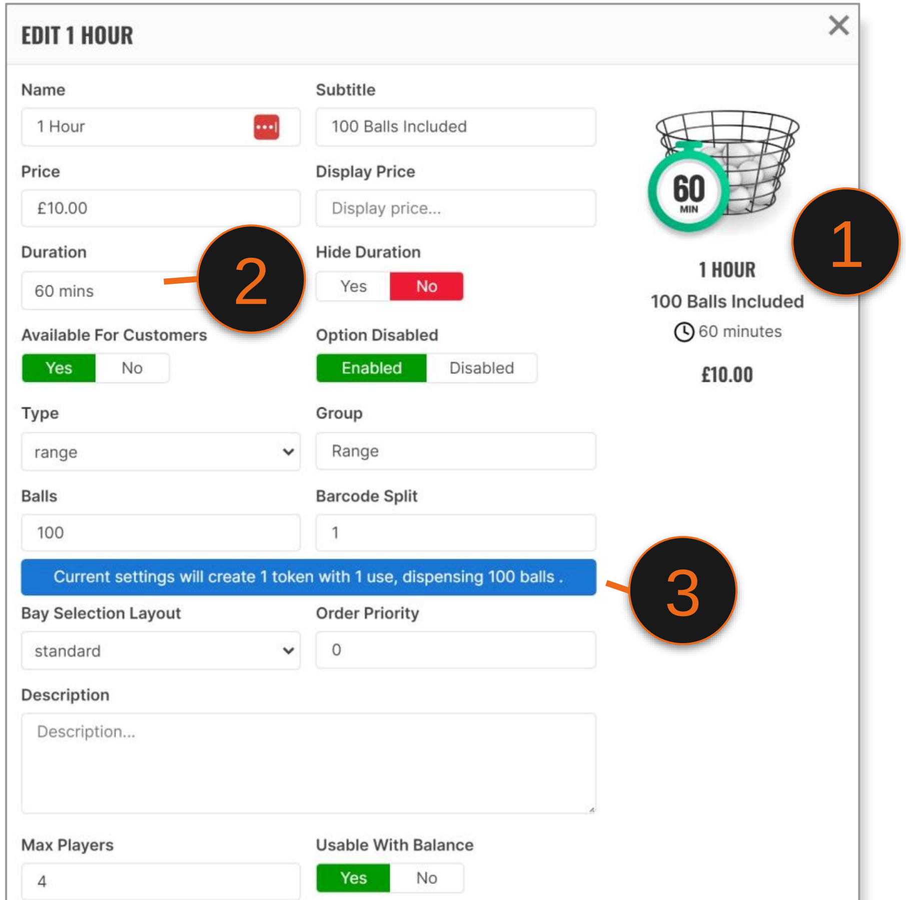
Most of the options when editing a player option are self explanatory. There must at least be a name, an image and some “people”.

3. “People” on a player option dictate how many actual players this player option counts as. You may think this is obvious, but consider setting up a player option “Small Family”. In this case you might want one Player Option that counts as 2 adults and 2 children.

Managing Bay Options

Like Player Options, we recommend keeping your Bay Options in groups for easy management. You can do so with the "group" field show below. There are quite a few options when creating or editing a bay option, so let's take you through the key ones.

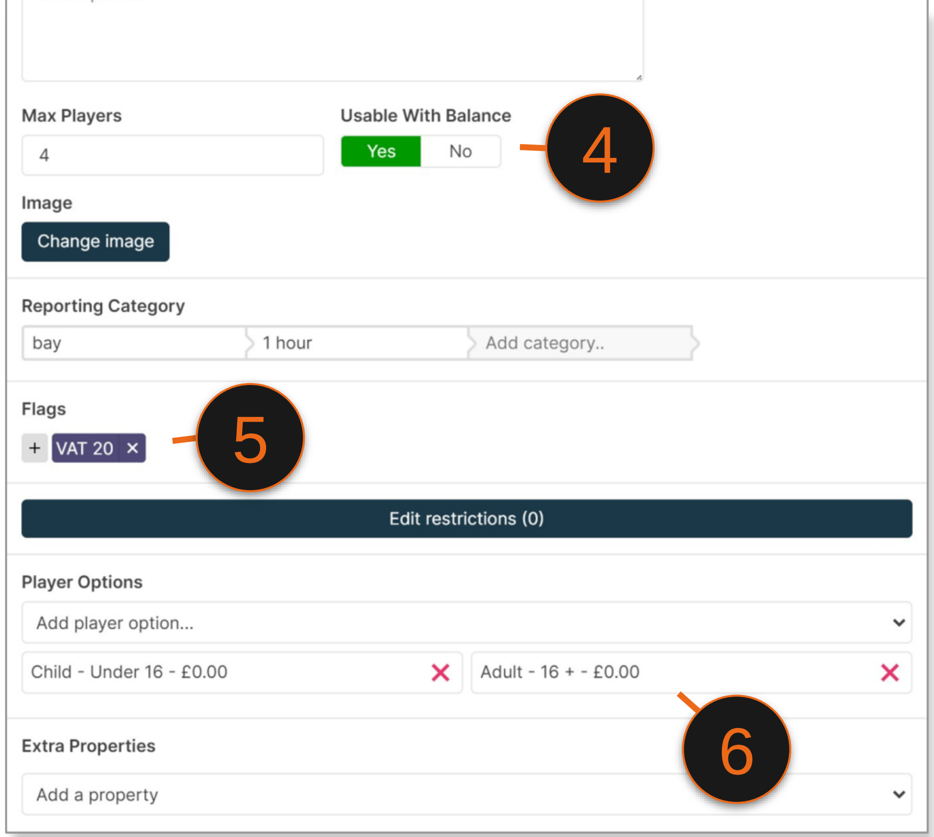
The mandatory fields to create a bay option are: "Name", "Image", "Duration" and "Player Options".



1. This is the preview of your bay option tile. This is how the option will appear to your customers. Play around with the settings and see how it changes.

2. The duration is very important to set correctly. It governs how many slots this bay option will take up. A bay option can't be selected unless its duration matches the slots selected.

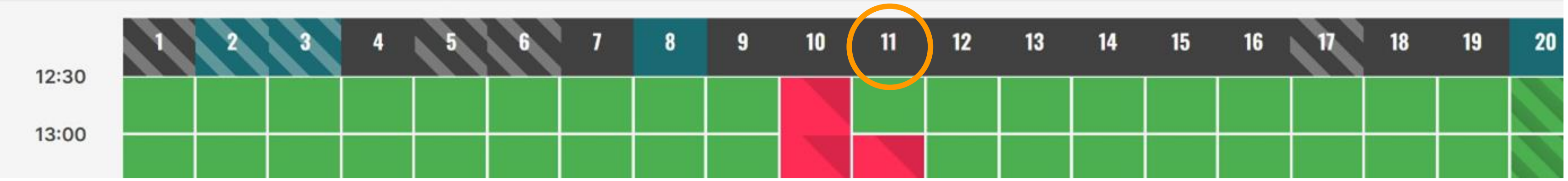
3. These settings are for balls, and are only relevant if your bay option "type" is "Range". These are important settings if you have a ball dispenser integrated.



4. Here you can decide if you'd like customers to be able to pay with their balance for bookings made with this bay option.

5. Here you can assign taxes to this bay option using flags. Flags are a more advanced topic, but we will cover their use with taxes later.

6. Finally, here you must add the player options that can be selected with this bay option. Adding in an option with a price will affect the displayed price on the Bay Option Tile [1].



Assigning Bay Options

Just because you've created some bay options, it doesn't mean they're immediately available to start using. Remember the object hierarchy earlier - we first need to have them assigned to bays.

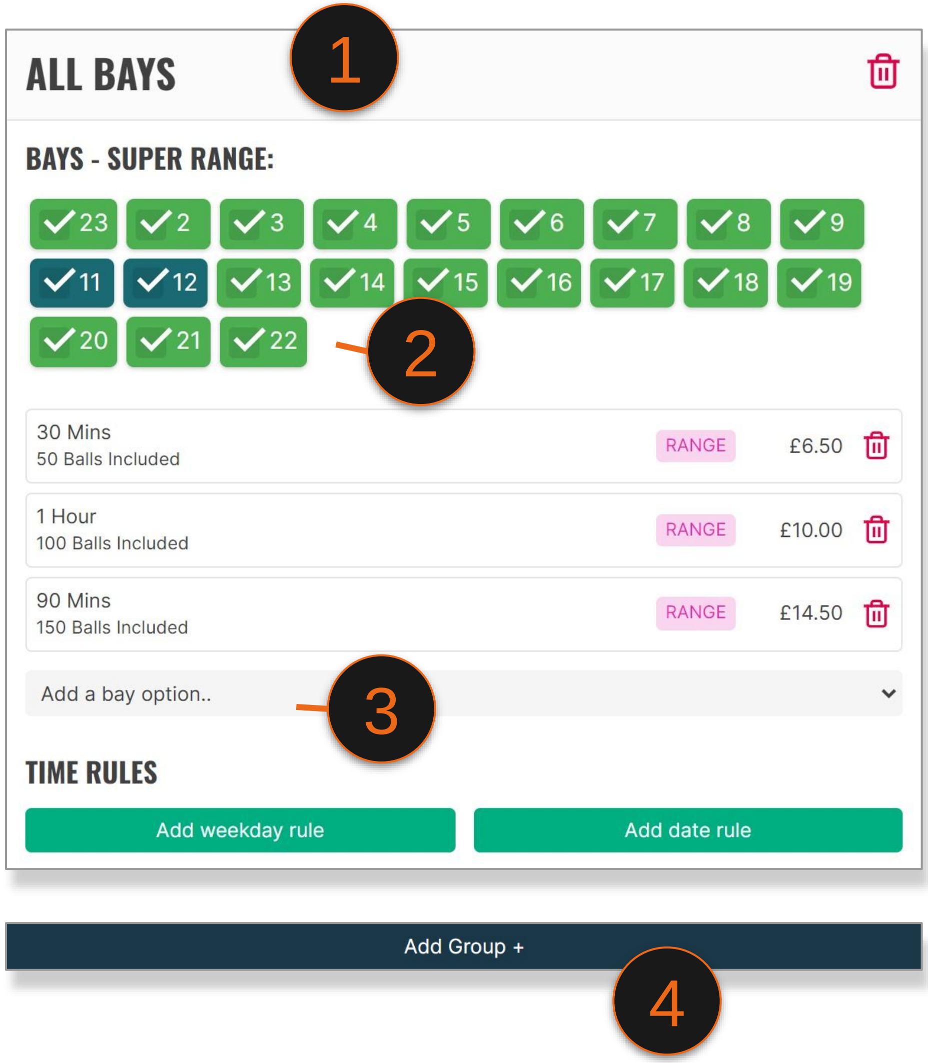
There are two ways you can do this. Firstly by going to the Range view, and selecting a bay as shown **above**. This is fine if you only have a couple of bays, but that can get tedious.

1. The other way is to use **Bay Groups**. You can access Bay Groups at **Settings > Range > Bay Groups**. The concept of bay groups is straightforward - Put your bays into groups, and then make changes to their bay options and time rules all at once. At the top here we can name the group. "All bays", "Teaching bays", it's up to you.

2. Here you can tick the bays you'd like to be in this group. In this case, we've selected all of our bays, because we want them all to have the same bay options.

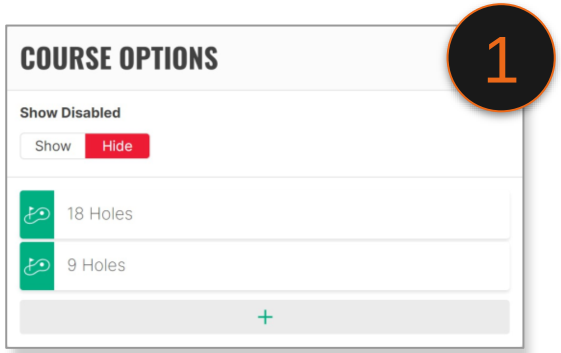
3. With this dropdown you can add bay options. Just above it you can see the ones that have already been added. For convenience we also show what "group" property the bay options have. This is another reason we recommend putting your bay options themselves into groups.

4. If you haven't already got a group you can create one here.



Managing Course Options

1. Heading to **Settings > Course Options** will bring you to your current list of available options. From here you can tap an existing option to edit it, or press the “+” to add a new one - either way you will launch the editor shown to the right. Remember from our [hierarchy]() that a course option is **not** a course - It’s the style of play. These course options can be set up with a specific course in mind, or you can reuse them across multiple courses.



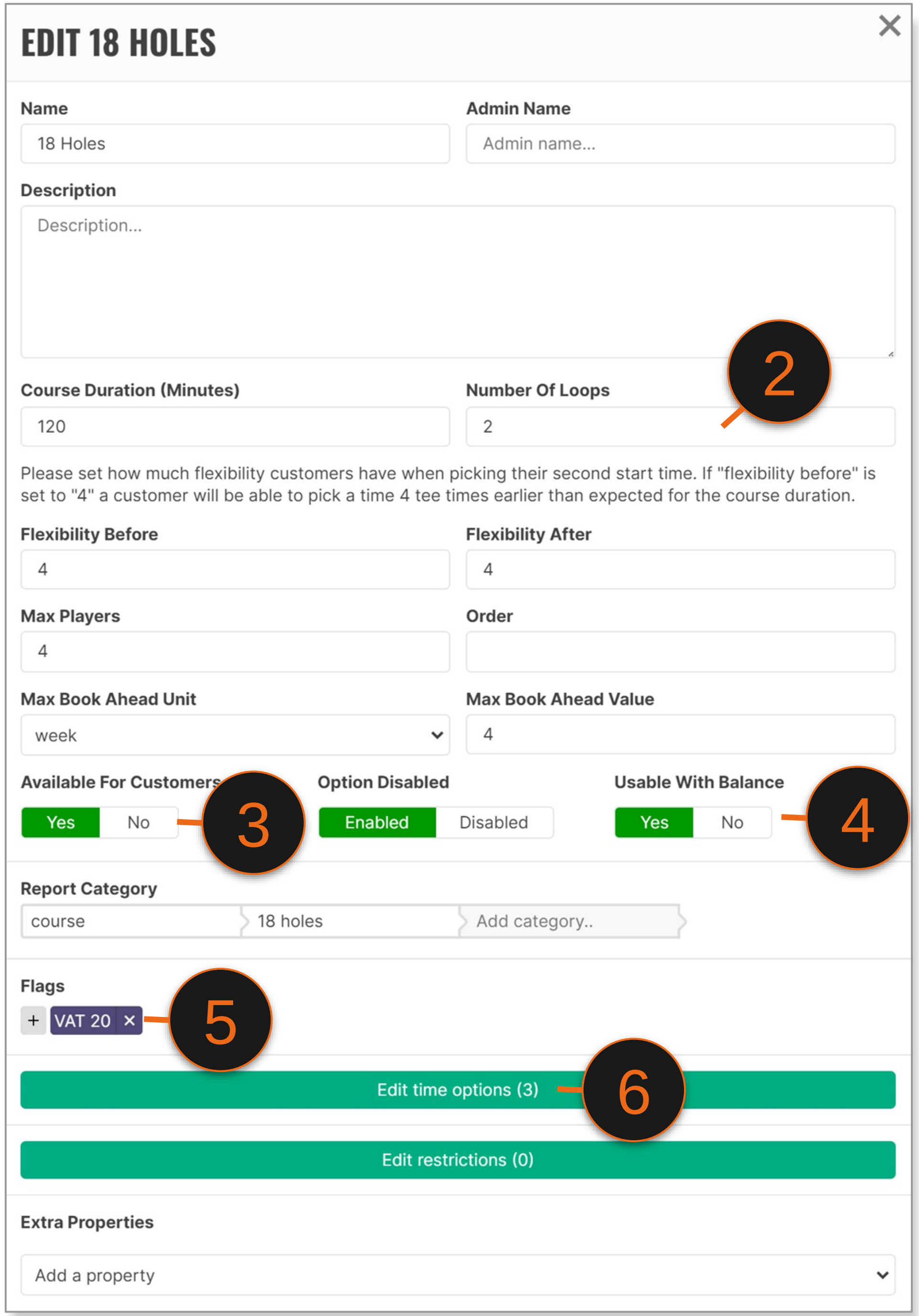
2. These settings are primarily for courses with replays / loops. For example a 9 hole course that you might play 2 rounds of. The number of loops dictates this, and the loop flexibility dictates how many tee times before or after the expected duration they can pick.

3. Here you can set whether this option is bookable by customers, or reserved just for staff to use. You might need an option to reserve a tee for coaching, for example.

4. Setting this to true will allow a customer to use their balance to purchase a booking with this course option.

5. Here you can assign taxes to this course option using flags. Flags are a more advanced topic, but we will cover their use with taxes later.

6. Finally, this is where we add our [time options]() to set what times of day this course option is bookable, and which player options can be booked. This is the main way we control the price of your course at different times of the day or days of the week.

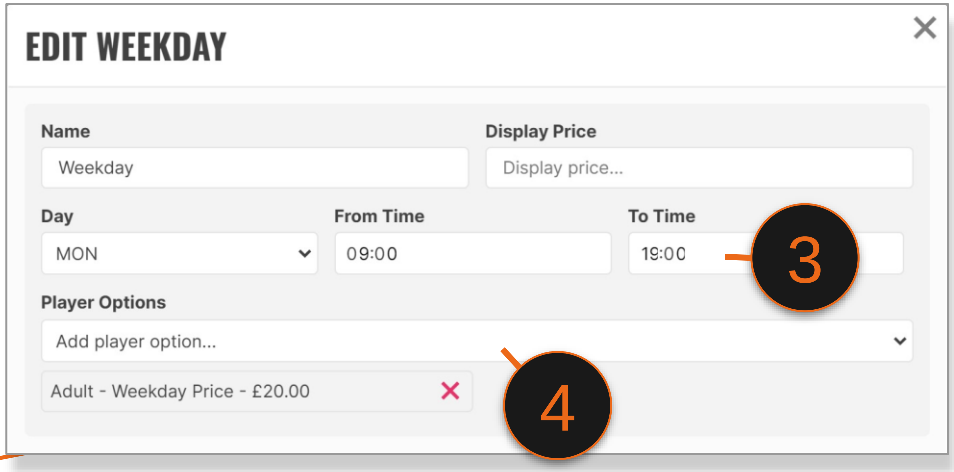


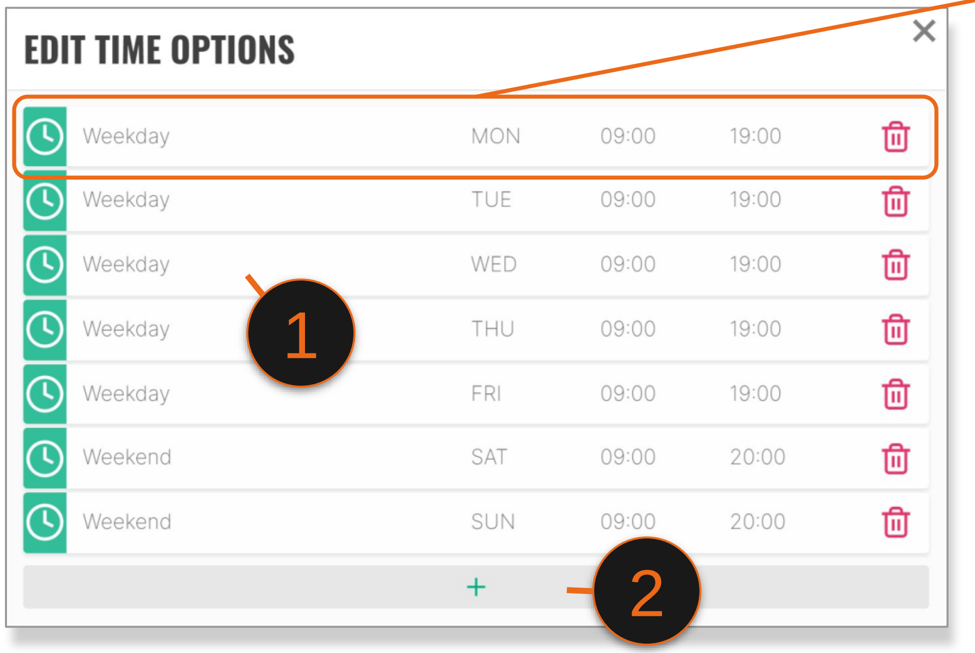
Course Options - Time Options

Now that we have some course options, we need to give them **Time Options**. If you're working on a new Course Option, save it, reopen it and you should now have a new button "Edit time options" - tap it to get started and you should see an interface like below. Refer back here if you're unsure of the structures we're talking about.

1. These are all time options we've created. You may not have any set up yet - if that's the case, we need to create our first one.

2. Press this button to create a new Time Option. You'll get presented an interface like the one on the right. For a time option to be valid it needs "Name", "Day", "From time", "To time" and of course at least one "Player Option".





3. The day, from time and to time are pretty self explanatory. Here we've set a time that will cover pretty much all of Monday. However, you can have as many Time Options as you want per day. Maybe you want to split your day into Morning, Midday and Afternoon times. It's up to you.

4. Finally you of course need some Player Options. Here we've kept things simple and have one "Adult" player option set up for weekday tee times. You can add as many as you like here. Remember, on courses the Player Option is the main thing controlling the price. If you want to offer more prices, you need to make more Player Options.

Managing Courses

With fully fleshed out course options, the only thing remaining is to add them to the courses that we want to use them on. You may want to create completely separate course options for each of your courses, but if you had two courses with the same prices and the same opening hours, you can just re-use the course options.

Going to **Settings > Courses** will show you a panel like the one ro the right for each of your courses.

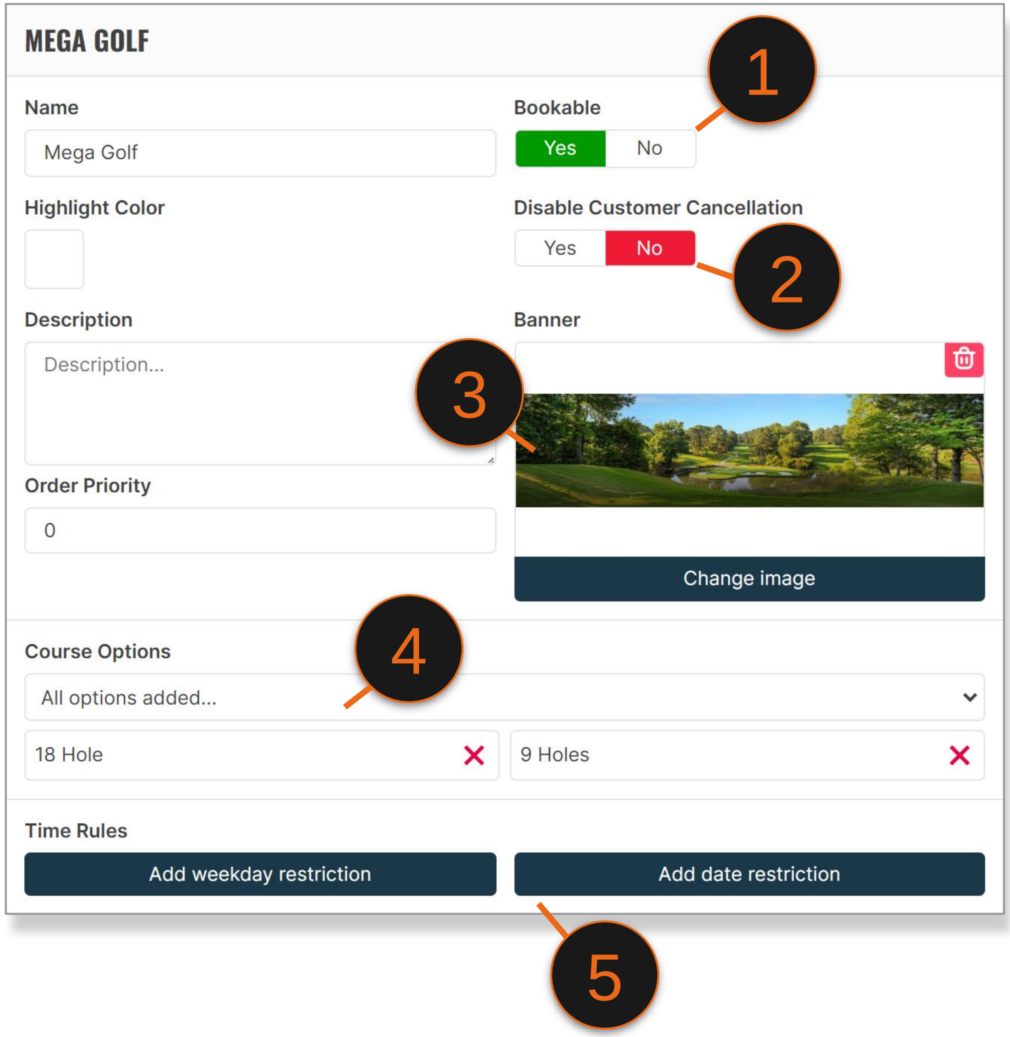
1. Here you can specify whether the course is bookable online. Turning this off will prevent any customers from booking themselves in.

2. This setting will allow or prevent customers from self-canceling their sessions. Modify this to suit your business needs.

3. This image will replace the default banner image on the customer booking page when this course is selected. If you need new images added to this list please reach out to support. We can give you some guidance on the image size and aspect ratio.

4. Most importantly, here is where you actually assign the Course Options. There will have to be at least one set up for your course to be bookable by staff or customers.

5. Here we can manage simple time restrictions on the course. This will create periods of time that customer cannot book, but when staff still can. More details on configuring these settings is here.



Course Time Rules

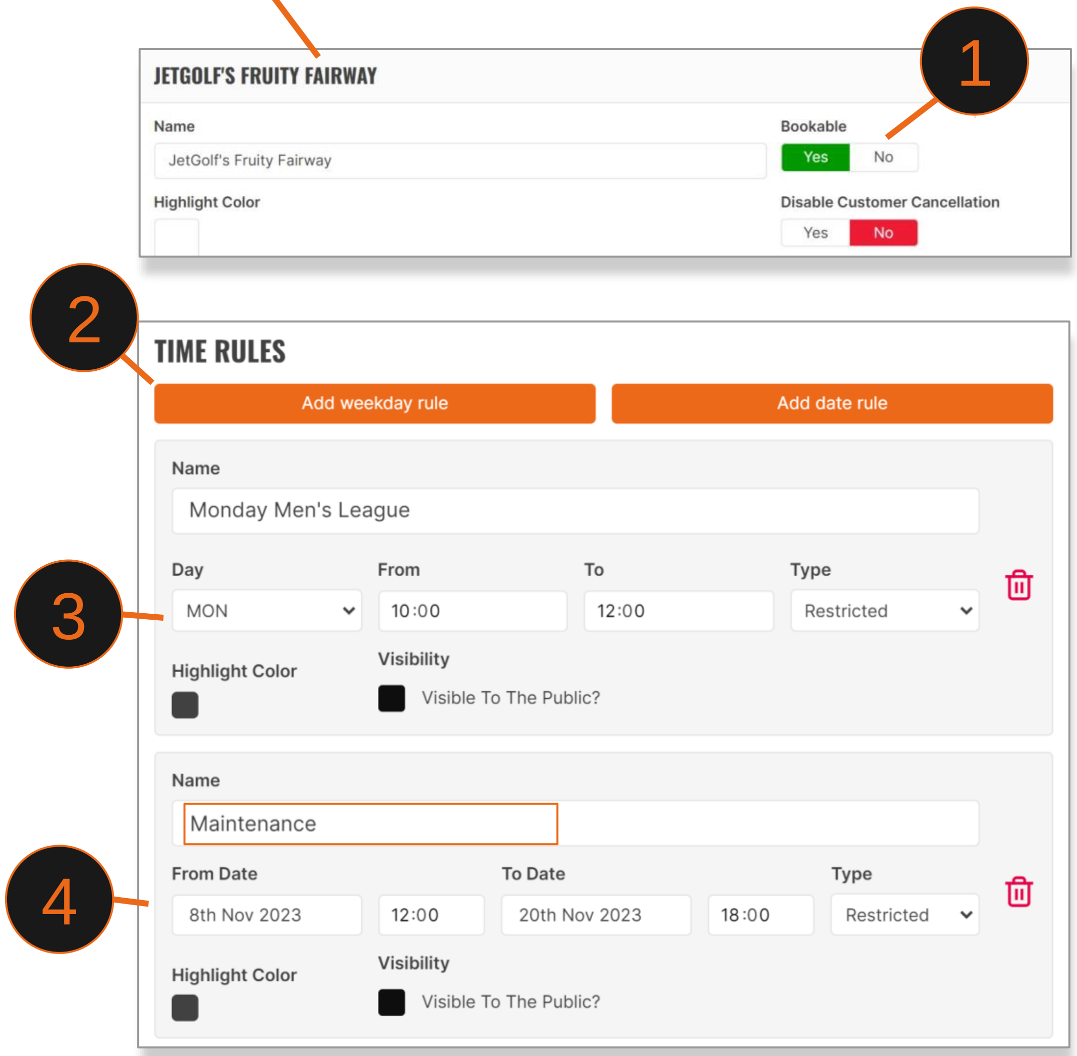
Here we can alter settings on when courses can be booked. Click on the settings cog as shown **above** to access the course settings.

1. **Bookable by customers**?
   Unticking this box will make the course not bookable by customers online. It will however still be bookable by staff.

2. **Create a new rule:** Tap here to add a new rule to the course.

3. **Weekday rule:** If the facility needs a certain time slot restricted for every day each week. (Monday Men's League).

4. **Date rule:** This allows restricting of a course for a long period between two fixed dates. Useful for long term restrictions like course maintenance.



Managing Products

1. Head over to **Settings > Products** and you'll be presented with the product list. Here you can search through your products, edit existing products or create a new one.

2. This tile previews how the product will look on the POS grid view. Modify some of the settings and see how it changes. You can also tap directly on the "shortname" (in this case Pe for Pepsi) and set it to something else.

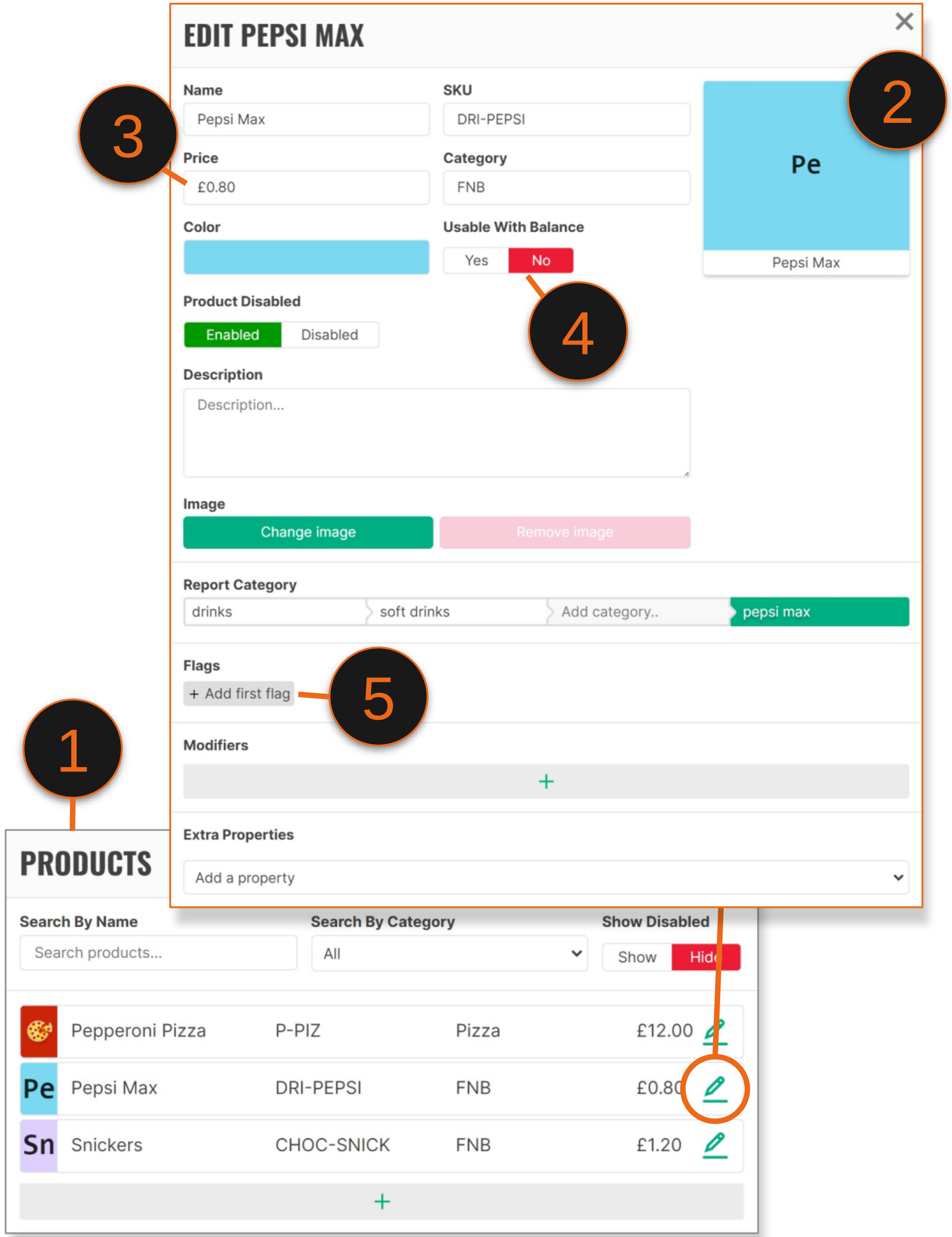
3. When setting the price, use only whole numbers of the lowest currency denomination. For example 100 would be $1.00.

4. Setting this to true will allow a customer to use their balance to purchase this product. If you need a refresher on customer balances you can go here.

5. Here you can assign flags to this product. The most common use-case for flags on products is to assign taxes. Flags are a more advanced topic, but we will cover their use with taxes later.

6. Setting an image will replace the shortcode on the product tile [1]. If you need new images added to this list please reach out to support. We can give you some guidance on the image size and aspect ratio.

Once you've created your product, you'll still need to add it to a POS layout to start using it. If you need a refresher you can go here.



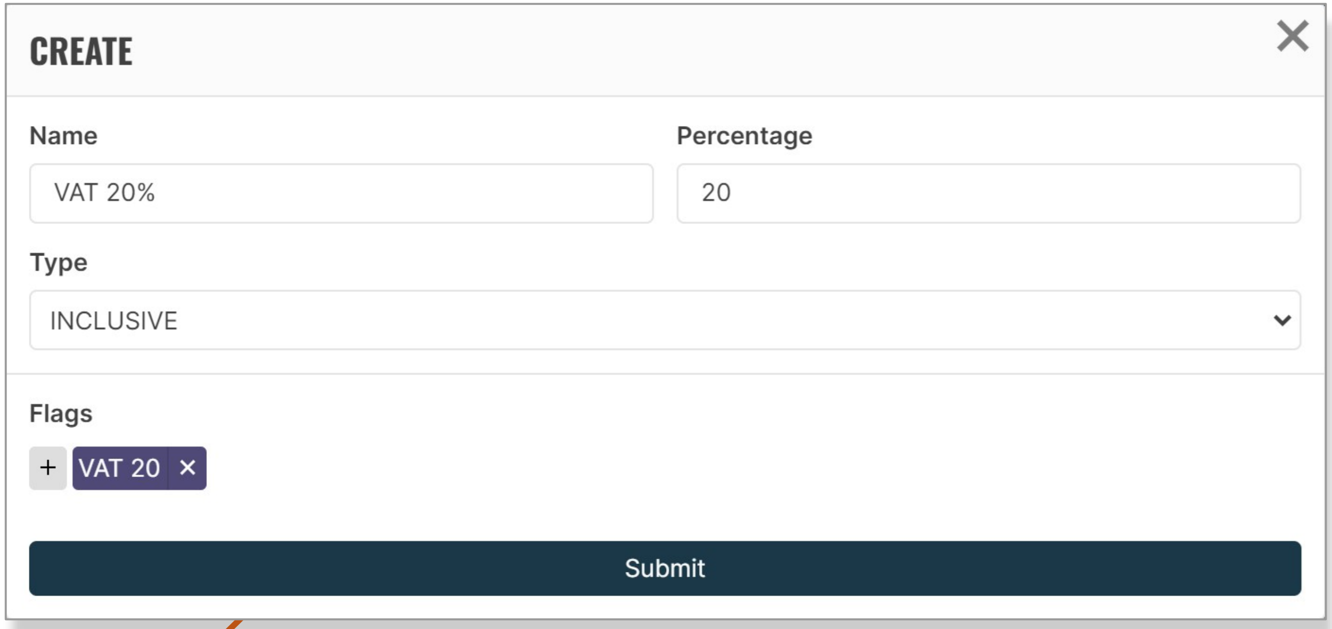
Taxes and Flags

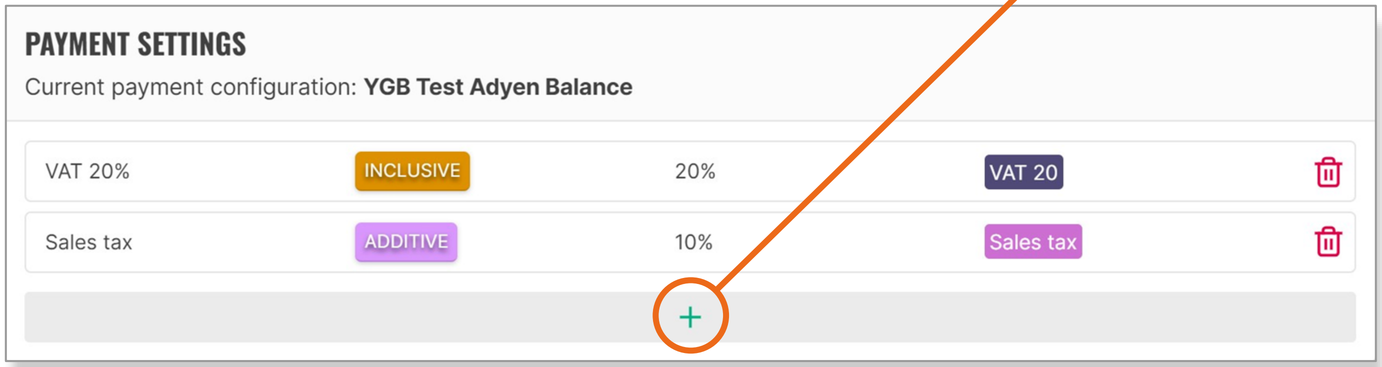
If you go over to **Settings > Payment**, the first option you'll see is Taxes. Taxes are easy enough to set up, and come in two main types.

Additive: The standard American sales tax is an additive tax. Items with additive tax will have their price inflated at checkout. The price you set on these items is the price **without** tax.

Inclusive: European VAT would be an inclusive tax. When dealing with items with this tax type, the price you set on them is **with** tax.

When it comes to applying these taxes, you will be using Flags.





Think of Flags as kind of like labels. You might create a flag called "Has Tax". The flag itself doesn't do anything, but the system will use it to pair up different objects with different rules.

In the case of taxes, you create a tax, and give it a flag. Now when you want the system to apply that tax to a product or similar, you just need to give that product the same flag that you gave the tax.

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