

From this point on, we are going to have certain SMS and email templates that need to be coded into the plugin to be loaded by default. So when the plugin is activated for the first time, a number of SMS & Email Templates will automatically be created.

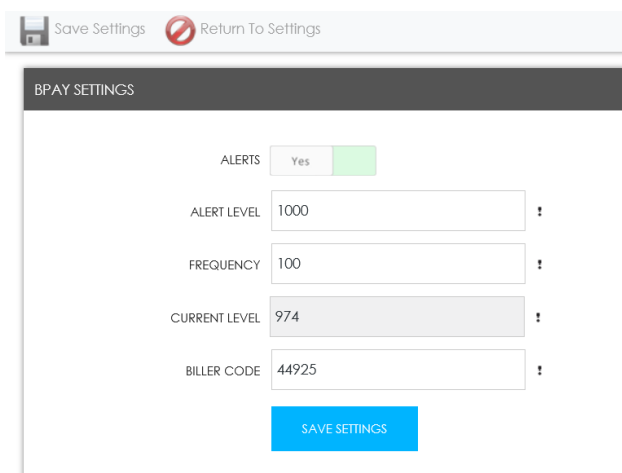
I will put these in place once you begin this list.

Next, we are going to setup the bookings, and booking invoices.

1. In settings, under "Payment Settings", create a new icon called "Banking Details".



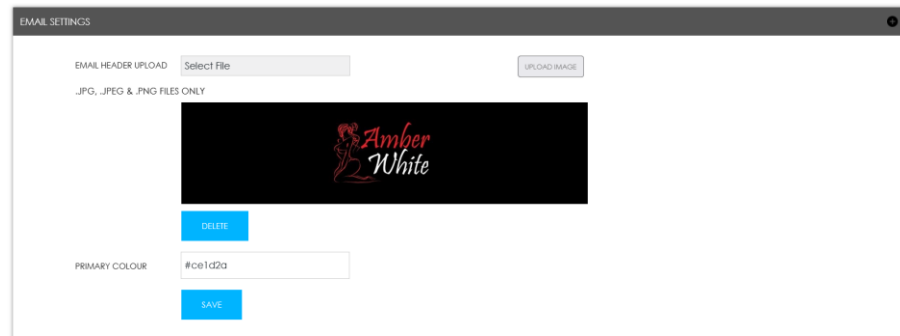
- a. ICON – money
- b. Page visible to View Status 2 and above.
- c. On the page:
 - i. TAB called "Banking Details"
 - ii. Fields
 1. Bank Name
 2. Account Name
 3. BSB
 4. Account Number
 5. Save button
 - iii. HEADER
 1. Save Settings
 2. Return To Settings Button

A screenshot of a "BPAY SETTINGS" form. At the top, there are two buttons: "Save Settings" (with a floppy disk icon) and "Return To Settings" (with a red circle and slash icon). Below the buttons, the form contains several fields:

- "ALERTS" with a toggle switch set to "Yes" (green).
- "ALERT LEVEL" with a text input field containing "1000" and a colon to the right.
- "FREQUENCY" with a text input field containing "100" and a colon to the right.
- "CURRENT LEVEL" with a text input field containing "974" and a colon to the right.
- "BILLER CODE" with a text input field containing "44925" and a colon to the right.

At the bottom of the form is a blue button labeled "SAVE SETTINGS".

2. Also in the Payment settings, add a new icon called “Invoice Settings”
 - a. ICON – view_pdf
 - b. Page visible to View Status 2 and above.
 - c. On the page:
 - i. TAB called “Invoice Logo”
 1. Exactly the same as the logo upload we have in the email settings.
 - a. Invoice Logo Upload
 - i. Delete Button
 - b. Primary Colour
 - c. Save Button



- ii. SECOND TAB called “Client Invoice Settings”
- iii. Fields
 1. Drop Down List – “Performer Title”
 - a. [Please Select]
 - b. Performer
 - c. Preference
 2. Text Editor (Not full editor, just like the SMS editor) – “Deposit Message”
 - a. This is a small text editor like the SMS editor which will contain some text that is used on the invoice.
 - b. Uses {Deposit_Total} key word. This will be replaced with an amount which is calculated from the invoice.
 - c. DEFAULT TEXT – This text will be automatically populated when the plugin is activated for the first time, but can be edited obviously after.

“PLEASE MAKE PAYMENT OF YOUR {Deposit_Total} DEPOSIT USING THE PAYMENT DETAILS LISTED BELOW.”
 3. Settled Title
 - a. This field will default to “Cash On Arrival” when the plugin is activated.
 4. Settled Message
 - a. Text editor like an SMS.
 - b. Default text when the plugin is activated will be

“Any balance remaining for this booking can be paid in cash when the performer has arrived.”

5. Dropdown List – “Payment Options”
 - a. Banking Details
 - i. Defaults to this option.
 - b. bPay Details
 6. Save button
 - iv. THIRD TAB – “Performer Invoice Settings”
 1. We will build this later
 - v. FOURTH TAB – “Performer Find Settings”
 1. We will build this later
 - vi. HEADER
 1. Save Settings
 2. Return To Settings Button
3. Next we will make the booking. It will be similar to the current system (<https://online.amberwhite.com.au/bookings/edit/7768>)

THERE WILL BE TWO COLUMNS

- a. SECTION - Booking Details
- b. Fields
 - i. Created Timestamp (Hidden From View)
 - ii. Active – Yes/No (Default Yes)
 - iii. Performer Payment (Dropdown) - REQUIRED
 1. Cash On Arrival (Defaults to this selection)
 2. Awaiting Payment
 3. Performer Paid
 - iv. Staff Member (Dropdown) - REQUIRED
 1. This lists all ACTIVE staff member NICKNAMES
 - a. [Please Select]
 - b. Lists all active staff alphabetically.
 - v. Customer - REQUIRED
 1. Search field that searches all customers.

CUSTOMER: Matthe| ! ⓘ

LINKED BOOKING: Name: Dave Matthews Mobile: 0412718420

PAYMENT DUE: Name: Dominic Matthews Mobile: 0407561332

CLIENT MOBILE: Name: Jon-Matthew Slaven Mobile: 0448480711

ING ALT. MOBILE: Name: Jye Matthews Mobile: 0422399174

ADDRESS: Name: Matthew Mobile: 0417674994

SUBURB: Name: Matthew Mobile: 0419589573

Name: Matthew Mobile: 0439203032

Name: Matthew Mobile: 0430020335

Name: Matthew Mobile: 0423517810

Name: Matthew Mobile: 0499099388

2. Please notice, there is a small icon next to the field. This opens the selected client profile in a NEW WINDOW. It only works after the booking has been saved.

vi. Linked Booking

The way this field works, is that if a client has a booking in the system, it can become the parent of other children bookings. This is how we attach multiple services to the same booking.

So, if the client books a show and two waitresses, it would be like this.

Show Record (Parent)
 --Waitress Record (Child)
 --Waitress Record (Child)

ONLY THE PARENT BOOKINGS SHOW UP IN THIS DROP DOWN.

CUSTOMER: Aidan Leeming ! ⓘ

LINKED BOOKING: Please Select ▼

PAYMENT DUE: Please Select
 2022-07-30 @ 07:30 PM

CLIENT MOBILE: 0430946262

If a client has no parent bookings, nothing shows.

CUSTOMER: ! ⓘ

LINKED BOOKING: ▼

PAYMENT DUE:

PLEASE NOTE: IF A PARENT BOOKING IS SELECTED, THE CONTENTS FOR THE FOLLOWING FIELDS BELOW ARE COPIED FROM THE PARENT BOOKING AUTOMATICALLY.

Payment Due, Client Mobile, Alternate Mobile, Address, Suburb, State, Postcode, Location, Booking Date. (I will explain these fields below).

- i. Payment Due - REQUIRED
 1. Date Field
 2. When you click it, today's date is highlighted and it comes up for the current month.

PAYMENT DUE: ! ⓘ

CLIENT MOBILE:

ALTERNATE MOBILE:

ADDRESS:

SUBURB:

STATE:

| May 2022 | | | | | | |
|----------|----|----|----|----|----|----|
| Su | Mo | Tu | We | Th | Fr | Sa |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | | | | |

- vii. Client Mobile - REQUIRED
 1. When you select a client from the search field above, this field will automatically be populated with the mobile number for the selected client.
- ii. Alternative Mobile - REQUIRED
 2. Second mobile number field.

BOOKING ALT. MOBILE:

- iii. Address - REQUIRED
- iv. Suburb - REQUIRED
 3. Searchable from our suburb database.

ADDRESS:

SUBURB:

STATE:

POSTCODE:

- v. State (Dropdown) - REQUIRED
 - 4. [Please Select]
 - 5. Available selections from the States in the database (ABBREVIATION)
 - 6. When the suburb is selected, it will automatically populate with the appropriate state for that suburb.
- vi. Postcode. - REQUIRED
 - 7. When the suburb is selected, it will automatically populate with the appropriate postcode for that suburb.
- vii. Nearest City (Dropdown): - REQUIRED
 - 8. [Please Select]
 - 9. Alphabetical list of all ACTIVE locations in the database.
- viii. Booking Date - REQUIRED
 - 10. Date field, same as Payment Date functionality above.
- ix. Performer - REQUIRED
 - 11. Search field (same as client above)
 - 12. Open performer icon in new window (same as client above)
- x. Service (Dropdown) - REQUIRED
 - 13. [Please Select]
 - 14. Alphabetical, all ACTIVE services in the database
- xi. Booking Start
 - 15. Default to 01:00 PM
- xii. Booking End
 - 16. Default to 01:00 PM

BOOKING START: :

BOOKING END: :

- xiii. Save Button.

- 4. Under the booking details section, there will be a new section
 - a. SECTION – Add Note

- i. Field – Booking Note
- ii. Save button – “Add Note”

- 5. When a note is added, it goes to the next section, which is at the top of the right column
 - a. SECTION – Booking Notes
 - b. If there are no notes for the booking, it is CLOSED by default.

- c. If there are notes added to the booking, it defaults to OPEN, so the notes can be seen.

- 6. Under this section, we will have the payment sections.
 - a. SECTION – Payment Totals
 - i. Performer Fee (\$)
 - 1. When a number is entered into this field, if it is not a two decimal value, it will be converted to one.
 - a. So, 100 converts to 100.00
 - b. 100.20 stays as 100.20

- ii. Our Fee (\$)
 - 1. When a number is entered into this field, if it is not a two decimal value, it will be converted to one.
- iii. Total Fee (\$)
 - 1. Read only. This automatically updates to the total of the Performer fee and our fee. It will update every time one of the fields above is exited. It does not have to be saved to update.

The screenshot shows a form with three rows of input fields. The first row is labeled 'PERFORMER FEE: \$' and contains the value '320.00'. The second row is labeled 'XXX FEE: \$' and contains the value '180.00'. The third row is labeled 'TOTAL PRICE: \$' and contains the value '500.00'. A horizontal bracket is positioned above the first two input fields, indicating that their values are summed to determine the total price.

- iv. SAVE BUTTON

b. SECTION – Incoming Totals

- i. Received From Client
 - 1. Number field like performer fee above.
- ii. Paid Date
 - 1. Date field
- iii. Receipt Number
- iv. Client Due To Pay
 - 1. Number field like performer fee above.
- v. Received From Performer
 - 1. VIEW STATUS 2
- vi. SAVE BUTTON

c. SECTION – Outgoing Totals

- i. VIEW STATUS 2
 - 1. Paid To Performer
 - a. Number field like performer fee above.
 - 2. Paid Date
 - a. Date field
 - 3. Refunded To Client
 - a. Number field like performer fee above.
 - 4. Refunded Date
 - a. Date field
 - 5. SAVE BUTTON

7. Under the payment sections, we will have another section.

a. SECTION – Performer (Invoice Display)

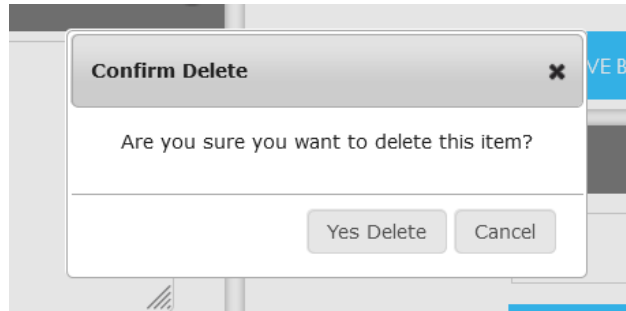
- i. Performer
 - 1. Searchable field for the ACTIVE performers

2. No icon required for this field to open the performer
3. SAVE BUTTON

8. Under that we will have another section
 - a. SECTION – Linked Bookings.
 - b. This will be the exact same as it is in the current system. It links all of the bookings that are grouped together.
 - c. The green icon opens the booking record.
 - d. The pdf icon opens the booking invoice

| INVOICE | PERFORMER | DATE | VIEW | PDF |
|---------|-----------|------------|------|-----|
| 007535 | Jayde | 2022-08-20 | | |
| 007537 | Peach II | 2022-08-20 | | |

9. Header
 - a. Save Booking
 - b. New Booking
 - i. Opens a new booking page to create a new booking
 - ii. ICON – Green plus
 - c. Duplicate Booking
 - i. Opens a new booking page to create a new booking, BUT it copies in ALL of the data from the page the user was currently on, so it can be changed slightly and saved again.
 - ii. It should NOT automatically save the new duplicated booking. It should only copy in the data from the old booking. Then the user can save it if the please, after making some changes.
 - iii. ICON – new_booking
 - d. View Invoice
 - i. ICON – View_pdf
 - ii. This is only available after the booking is first saved. I will explain below.
 - e. Delete Booking



- i.
 - ii. VIEW STATUS 2
- f. Return To Bookings

10. When the booking is first saved, it will automatically generate the invoice for the booking.

- a. PLEASE NOTE: for bookings that are linked, every time ANY booking is saved, that is linked to other bookings, it must ALSO update the invoice for ALL of the bookings it is linked too. So they all match and contain the same information.
- b. Once the invoice has been compiled in pdf form, then "View Invoice" button will then appear in the header.
- c. We have two different client invoice templates.
 - i. The first is if the "Client Due To Pay" field > 0.
 - 1. If this field is greater than 0, it means the client owes us money, and one template appears.
 - ii. The second is if the else version.
 - 1. This means the client doesn't owe us money, so a different version is populated.

I will refer to these differences in the instructions below, but here are two examples.

OWES US MONEY

TAX INVOICE #007618



| | |
|----------------|-------------|
| INVOICE: | #007618 |
| JOB DATE: | 30-Jul-2022 |
| DEPOSIT DATE: | 31-May-2022 |
| PAID TO DATE: | \$0.00 |
| DEPOSIT OWING: | \$320.00 |

client
Aidan Leeming
30th Jul, 2022
A/c: 159 Old Burleigh Road
BROADBEACH, QLD 4218

| PREFERENCE | SERVICE | TIME | PRICE | PAID | OWING |
|-------------|---------------------------|---------------------|---------------------|-------------------|----------|
| Lara Ashley | Topless Waitress | 07:30 PM - 10:30 PM | \$420.00 | \$0.00 | \$420.00 |
| Rae | Topless Waitress | 07:30 PM - 10:30 PM | \$420.00 | \$0.00 | \$420.00 |
| Rae | Strawberries & Cream Show | 09:00 PM - 09:20 PM | \$330.00 | \$0.00 | \$330.00 |
| | | | TOTAL: | \$1,170.00 | |
| | | | TOTAL OWING: | \$1,170.00 | |

PLEASE MAKE PAYMENT OF YOUR \$320.00 DEPOSIT USING THE BPAY DETAILS LISTED BELOW.
YOUR BOOKING WILL NOT BE CONFIRMED UNTIL YOUR DEPOSIT IS PAID AND RECEIVED INTO OUR ACCOUNT. THIS PROCESS TAKES 2-3 BUSINESS DAYS.
THE REMAINING BALANCE IS TO BE PAID IN CASH ON THE NIGHT TO THE PERFORMER/S

payment methods



Biller Code: 44925
Ref: 1386771327

Telephone & Internet Banking - BPAY®

Contact your bank or financial institution to make this payment from your cheque, savings, debit, credit card or transaction account. More info: www.bpay.com.au

DOESN'T OWE US MONEY

TAX INVOICE #007535



| | |
|---------------|-------------|
| INVOICE: | #007535 |
| JOB DATE: | 20-Aug-2022 |
| PAID TO DATE: | \$930.00 |
| AMOUNT OWING: | \$1,200.00 |

client

Ricardo Rogers
20th Aug, 2022
24 Bonview Avenue
SOMERS, VIC 3927

| PREFERENCE | SERVICE | TIME | PRICE | PAID | OWING |
|------------|------------------|---------------------|----------|---------------------|-------------------|
| Kylie II | Topless Waitress | 08:00 PM - 12:00 AM | \$710.00 | \$310.00 | \$400.00 |
| Jayde | Topless Waitress | 08:00 PM - 12:00 AM | \$710.00 | \$310.00 | \$400.00 |
| Peach II | Topless Waitress | 08:00 PM - 12:00 AM | \$710.00 | \$310.00 | \$400.00 |
| | | | | TOTAL: | \$2,130.00 |
| | | | | TOTAL OWING: | \$1,200.00 |



payment methods

Cash on Arrival
You can provide the performer with cash upon arrival.
Payment must be made at the start and the performer will not commence until they have received the payment.

Amber White Entertainment, ABN 96 150 185 952, 9/204 Alice St, Brisbane QLD, 4000.

- d. You can check the invoice in the current system for exact details. However, it is as follows:
 - i. TAX INVOICE #{number}
 - ii. Logo
 - 1. Pulled from the settings page, where we have uploaded to invoice logo for the client invoice.
 - iii. Header Box (Top right)
 - 1. Invoice:
 - 2. Booking Date:
 - 3. Deposit Due:
 - a. THIS ONLY SHOWS ON CLIENT DUE TO PAY > 0
 - 4. Paid To Date:
 - 5. Amount Owing:
 - a. THIS ONLY SHOWS ON THE ELSE VERSION
 - 6. Deposit Owing:
 - a. THIS ONLY SHOWS ON CLIENT DUE TO PAY > 0
 - b. This is the amount which is entered into the "Client Due To Pay" field.
 - c. For linked bookings, this is the total of all linked bookings.

| | |
|----------------|-------------|
| INVOICE: | #007618 |
| JOB DATE: | 30-Jul-2022 |
| DEPOSIT DUE: | 31-May-2022 |
| PAID TO DATE: | \$0.00 |
| DEPOSIT OWING: | \$320.00 |

| | |
|---------------|-------------|
| INVOICE: | #007535 |
| JOB DATE: | 20-Aug-2022 |
| PAID TO DATE: | \$930.00 |
| AMOUNT OWING: | \$1,200.00 |

iv. Bookings Table

1. Performer / Preference
 - a. The word used for this title is decided in the client invoice settings. They can choose what word is displayed for this title in the "Performer Title"
 - b. This displays the name that has been entered into the performer field in the Performer (Invoice Display) SECTION for a booking record.
2. Service
 - a. This is the service name that has been selected for a booking.
3. Time
 - a. This is the state and end time for the booking record.
4. Price
 - a. This is the total price for the booking (total fee field)
5. Paid
 - a. This is the amount in the Received From Client field.
6. Owing
 - a. This is the Total Fee minus the Received From Client field.
7. Total
 - a. This is the total fee for all linked bookings
8. Total Owing
 - a. This is the Owing amount for all linked bookings.

| PREFERENCE | SERVICE | TIME | PRICE | PAID | OWING |
|-------------|------------------------------|---------------------|--------------------------------|--------|----------|
| Lara Ashley | Topless Waitress | 07:30 PM - 10:30 PM | \$420.00 | \$0.00 | \$420.00 |
| Rae | Topless Waitress | 07:30 PM - 10:30 PM | \$420.00 | \$0.00 | \$420.00 |
| Rae | Strawberries & Cream Show | 09:00 PM - 09:20 PM | \$330.00 | \$0.00 | \$330.00 |
| | | | TOTAL: \$1,170.00 | | |
| | | | TOTAL OWING: \$1,170.00 | | |

v. The next is the textual message on the invoice.

This only displays if the client due to pay > 0.

It is the message that is entered in the client invoice settings, in the “Deposit Message” field.

This will include the keyword for the {Deposit_Total} which will be the total amount for all linked bookings.

The deposit owing field is the amount entered into the Client Due To Pay field.

vi. The next section is the payment methods.

If the client due to pay is 0

1. The title for this will be the “Settled Title” that is in the client invoice settings.
2. The text content will be the “Settled Message”

payment methods

Cash on Arrival

You can provide the performer with cash upon arrival.
Payment must be made at the start and the performer will not commence until they have received the payment.

If the client due to pas > 0

1. It will depend on what the user has selected for the payment options in the client invoice settings.
2. If the user has left it on the default of Banking Details, it will display as follows

Title = Banking Details

Message = “Please make payment into the following account by the due date listed above”

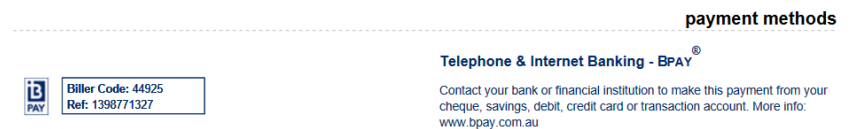
{Bank Name}

Account Name: {Account Name}

BSB: {BSB}

Account Number: {Account Number}

3. If the user has selected bPay as their payment method, it must be set out exactly as it is in the current invoice, using the correct logo and message etc.



BILLER CODE – This comes from the bPay settings

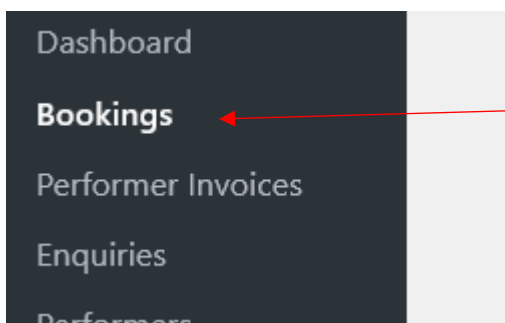
REF – This comes from the client database, the client biller code

CLIENT BILLER CODE

1398299428

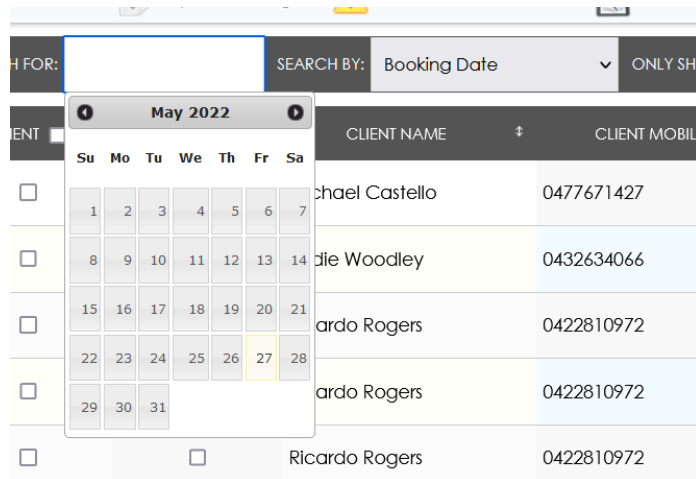
SAVE CLIENTS

11. The display page for the bookings list will be as follows.



- a. Header
 - i. New Booking (Plus Icon)
 - ii. Send SMS (ICON – New_sms)
 1. Will do later
 - iii. Performer Confirmations (ICON – checklist)
 1. Will do later
 - iv. Client Confirmations (ICON – calendar)
- b. Search box

- c. Search By
 - i. Client Mobile (Default to this)
 - ii. Client Name
 - 1. First and Second like the client search you recently updated
 - iii. Performer
 - iv. Receipt Number
 - v. Booking Date
 - 1. In the current system, if this is selected, the search box field turns becomes a date selector when you click into it. But it is a normal text field if anything else is selected.



- vi. Invoice Number
 - 1. The number that is assigned to an invoice when it is created.
 - 2. I assume a different number is assigned to each record, so if bookings are linked, I assume they all have different numbers.

Given this, if an invoice number is entered, it should also list all of the bookings that it is linked too.

- d. Only Show Me
 - i. [Show All]
 - ii. Active
 - iii. Inactive
- e. Results Per Page
- f. Search
- g. Reset

12. Columns

- a. Client
 - i. Tickbox
- b. Performer
 - i. Tickbox
- c. Client Name
 - i. First and Last Name
- d. Client Mobile
- e. Performer

- i. Performer Name
 - 1. From the Booking Details section, NOT the invoice display.
- f. Service
- g. Date
 - i. Booking Date
- h. Time
 - i. Booking Start Time

The list should be ordered by the Date field (the bookings furthest into the future from today's date first).