



BookingTrack

Venue Booking and Contact Management

Software From David Kinrade Internet Design

Basic User Guide

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Introduction

BookingTrack is an integrated solution that allows small to medium sized hospitality venues to manage bookings and keep track of clients and contact details. It incorporates calendar and event management functions, allowing multiple bookings per event, repeated bookings and extensive event requirement management.

This guide will take a look at the features BookingTrack contains and also walk through the essential steps that need to be completed to use the system successfully.

NOTE: all illustrations used within this guide are from BookingTrack running within Windows 10. The program is fully compatible with MAC OSX and also with most Linux distributions.

BookingTrack Principles

BookingTrack takes a very compartmentalized approach to the management of Clients, Events and Bookings, with each of these primary modules being managed independently but also intimately linked to each other.

Clients Information is managed in terms of contacts made between those clients and the business. Both incoming and outgoing communication would normally be logged every time a contact is made.

The Events Database stores details of a particular event – a Wedding or Party for example – detailing the venue, number of guests, staff requirements, resource requirements and accounting details. Events do not have times and dates associated with them within the events database.

The Booking Database allows the business to see a calendar-based view of any bookings that have been made. Each booking is linked to an Event. It details the date, time and duration of the booking, who the booking was made by and notes about the booking. Repeat bookings – that point to the same Event Entry – can be easily made in a variety of repeat options.

Simple Venue and Staff databases are created and used to link everything together.

Updates & Change Log

Please find listed here, the changelog for the program.

Version 1.00.40	Added remote access to Client/Contact data from other computers on local intranets.
Version 1.00.35	Increased the size limits for dishes within courses for the menu editor.
Version 1.00.33	Updated CSV import routines to do Canapés and Buffet dishes.
Version 1.00.33	Allow the setting of a Service Start Time for Main Service, Canapés & buffet
Version 1.00.32	Refactored Events Menu system to allow cover counts to be entered. Added import routine for Dish data and Client data
Version 1.00.30	Added Planner View to Booking Calendar for view and printout.
Version 1.00.29	Added dual page cloud publishing. Colour coding and icons in the booking calendar view.
Version 1.00.23	Staff ToDo list can be printed for each staff member
Version 1.00.20	Created the Menu System related printable reports and screen layouts
Version 1.00.14	Redraw of main calendar form. Added Cloud page system
Version 1.00.13	Bug fixes and Tidy-up – finalized the adding of the quick menus and edit actions to the requirements section of the program
Version 1.00.12	Bug fixes and Tidy-up – started to add quick menus and edit actions to requirements section of the program
Version 1.00.10	Bug fixes and Tidy-up - First Release Candidate
Version 1.00.00.Beta	First working prototyping

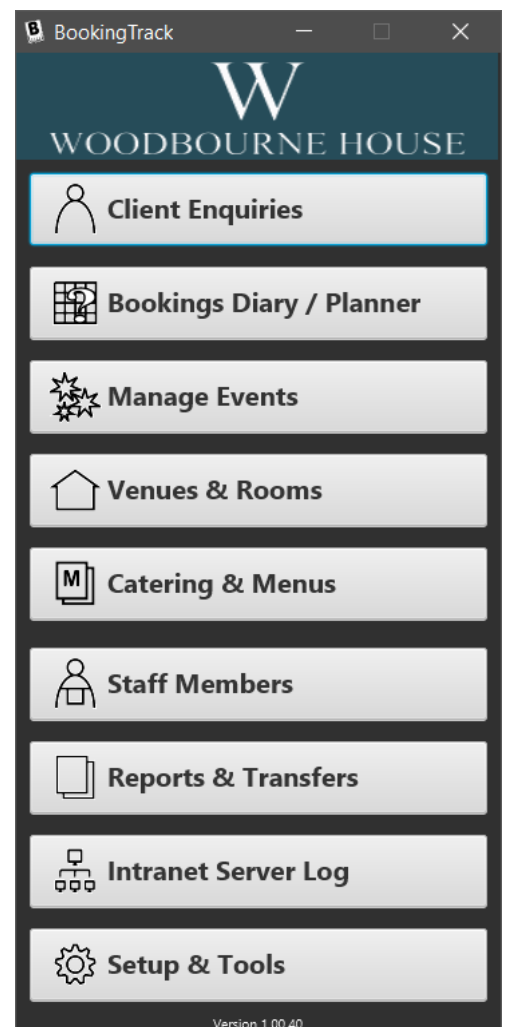
Starting Up



When BookingTrack starts, it initially opens two windows – the main menu and the calendar view – if there are any bookings scheduled for the current day, the Booking Day List will also be shown automatically as shown in the example above.

We are going to step through the options on the main menu, not in the order in which they are read, but rather in the order they would need to be accessed when setting up the system for the first time. Certain databases need to be minimally populated before other parts of the system can be used.

At the end of this guide, we will also touch on the various reporting options and automated data management facilities that are available within BookingTrack.



Staff Members

It is always good to start with what would normally be considered to be the fixed or permanent data. In our case this is important for the use of other database modules within BookingTrack. Many of the sections of BookingTrack that we are going to use regularly require us to specify the Staff Member supplying the data, so we will start by entering staff members into the database.

Clicking on Staff Members in the main menu will open the Staff Members List – it will initially be empty – displaying all the staff members registered in the system.

Basic navigation is common throughout BookingTrack. Double-clicking on an entry in a list or table of information will bring up details about that item. Buttons – usually at the bottom of a screen – will provide functions related to the listed information – in this case the ability to create a new staff member entry.

Right-Click context menus are often also available on these lists, providing duplicate functions and also sometimes additional options not available on the primary interface.

Clicking on Duty Report will produce a printable report which lists any requirements from upcoming events that have been assigned to that particular staff member. You need to click to highlight a member of staff before this option will work.



 A screenshot of the 'BookingTrack - Staff Details Editor' window. The window has a title bar with a 'B' icon and a close button. It contains several input fields: 'Name' (filled with 'David Upton-Jones'), 'Position' (filled with 'House Manager'), 'Address' (with placeholder text 'Enter their home address'), 'Telephone' (with placeholder text 'Enter necessary phone numbers'), and 'Email' (filled with 'david@woodbournehouse.im'). At the bottom right, there is a blue button labeled 'DONE'.

Whether you create a new entry or edit an existing one, the form shown here is the same.

Edit any of the details that you need and click DONE when you are finished.

There is an option on the Right-click menu to DELETE the selected record. This should be used with caution, as it removes any references to the deleted Staff Member from other sections of the database.

Venues

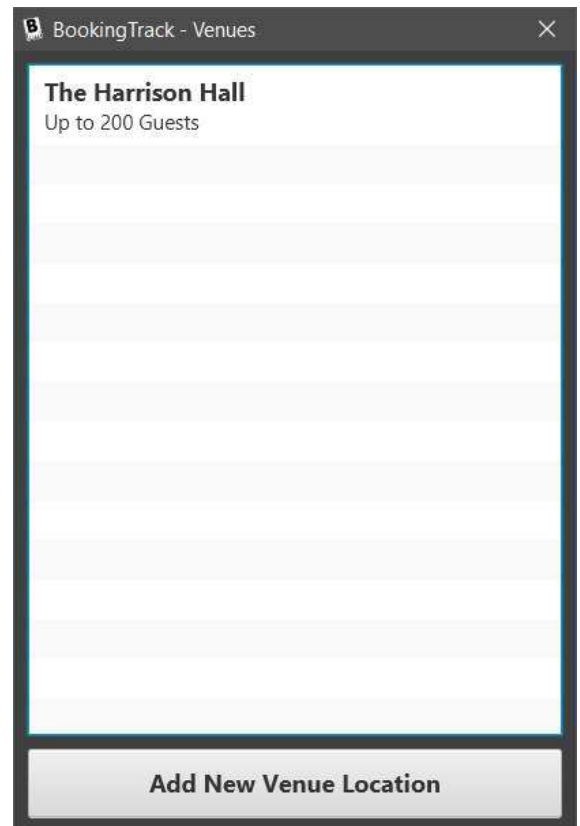
In order to create bookings of Events, BookingTrack needs to have a list of available venues to choose from. Here the definition of a venue is a loose one. You can create as many different Venue entries as you require, using the titles and descriptions of the venues to specify single rooms, multiple rooms, outside venues, etc.

Again, some venue information is needed in order to create entries in the Bookings and Events databases so we are dealing with this early.

Clicking on the Venues button in the Main Menu brings up a list of all the currently defined Venues.

Double-clicking on an entry in a list or table of information will bring up details about that item. Buttons – usually at the bottom of a screen – will provide functions related to the listed information – in this case the ability to create a new staff member entry.

Right-Click context menus are often also available on these lists, providing duplicate functions and also sometimes additional options not available on the primary interface.



Enter the required details for the venue into the space provided and click DONE when you are finished.

You can use as much space as you like for the description and facilities entries.

Calendar Colour allows you to specify a background colour for the entries that will appear in the Booking Calendar screen and on any CloudView calendars that you make available online. We recommend that you stick to light colours as the normally overlaid text in these screens is black.

There is an option on the Right-click menu to DELETE the selected record. This will remove references to the Venue from associated Booking and Event entries. Such entries will not be invalidated, but the information will need to be edited.

Catering & Menus

Before working with clients and bookings, it is good practice to take the time to set up and define the details of catering for the business. BookingTrack has a comprehensive menu building system, allowing detailed, multi-choice multi-course menus to be created from a database of dishes.

Working from the bottom up, BookingTrack takes a database of individual dishes – each with detailed descriptions and allergy information – and builds these into courses with various choices of dish. These courses are then added to a Menu – a list of different courses – in order – that can be served as part of an event.

Once created, the menu can be assigned to an event and the chosen dishes in each course can be selected and displayed. The system provides for comprehensive logging of individual guest exemptions and special requirements.

Separate databases are maintained for Canapés and Buffet dishes. These can also be added to an event to be included in the comprehensive reporting documentation that is sent to the kitchen.

The Pop-Up Menu

The catering options are accessed by clicking on the button in the main menu. The menu will pop into view when the button is pressed and hide again on a second press.



Edit Dishes: Individual Recipes

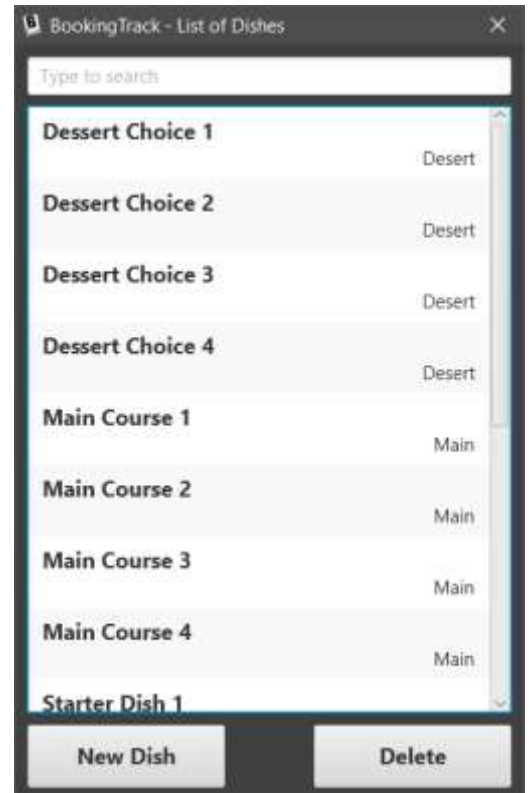
Dishes are the building blocks of the Menu system. Clicking on the menu option will display a searchable list of dishes stored in a continuous database.

From this list, you have options to create a new dish, edit an existing one or delete a dish from the list.

Clicking on the buttons to create a new dish, or delete an existing one will perform the appropriate actions. There is a right-click menu on the list to perform these functions as well.

Creating a new dish, or editing an existing one, will bring up the main editing window. Here we can give our dish a title and description, list any allergy information and also specify if it is a vegetarian dish.

It is important to specify the type of dish as well. This will help in the next section when we come to build a course entry.



Dish Title: Main Course 1

Short Details: This is the main course option one

Long Details: Here we can describe the course in detail, with lots of fancy words about the ingredients and the preparation.

Allergens: Add any allergy information here

Dish Type: Main

Vegetarian: ☒ YES

DONE

Edit Courses: Lists of Dishes

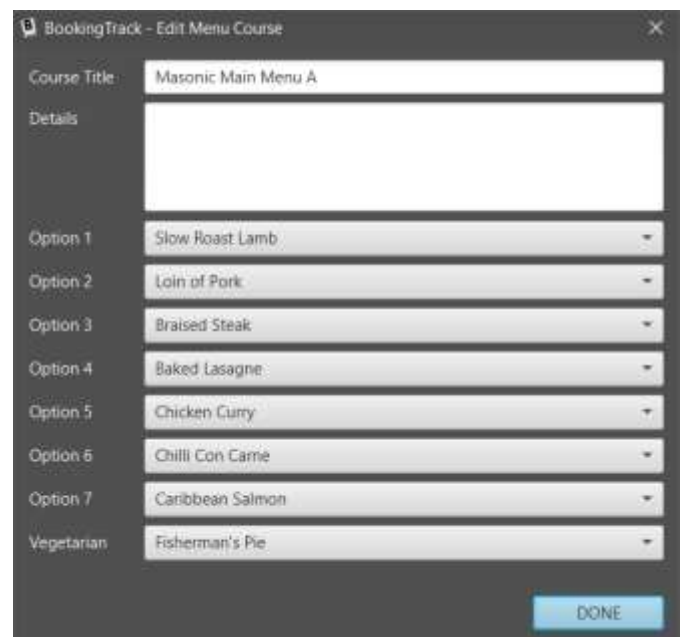
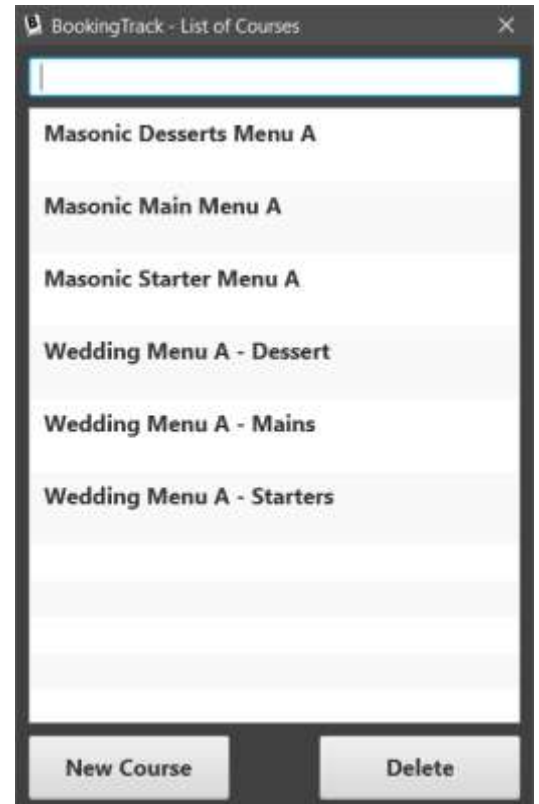
In BookingTrack, a Course is a list of up to five dishes (four choices and one Vegetarian option) that can be presented to the client when they are planning their event.

Clicking on the main menu option will bring up a list of currently defined courses. Here you will have the usual options to add new course lists, modify existing ones and delete lists that are no longer required.

Creating or editing a course brings up the main editing window.

Here we can assign a title and some details about the course and its choices.

Each of the options is now selected from the previously defined list of dishes. If we don't wish to have four dish choices, then we can leave some of the options blank.



Edit Menus: Lists of Courses

Finally, a full menu is built from a list of up to five courses.

Clicking on the main menu option will bring up a list of currently defined menus. Here you will have the usual options to add new menus, modify existing ones and delete menus that are no longer required.

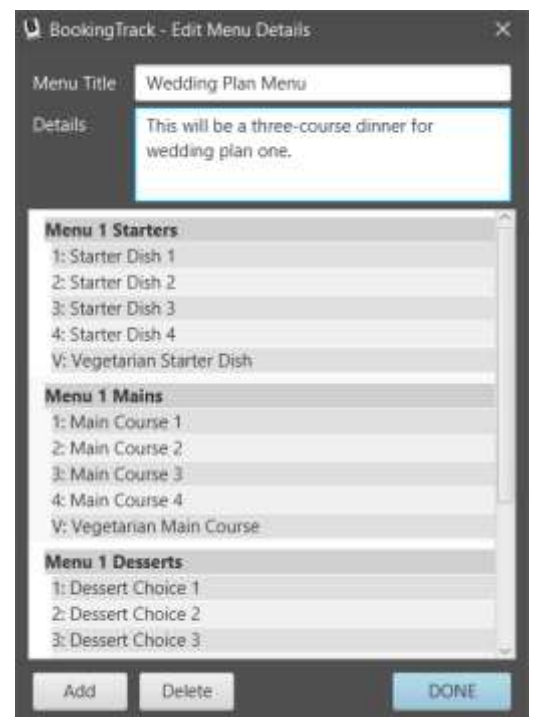
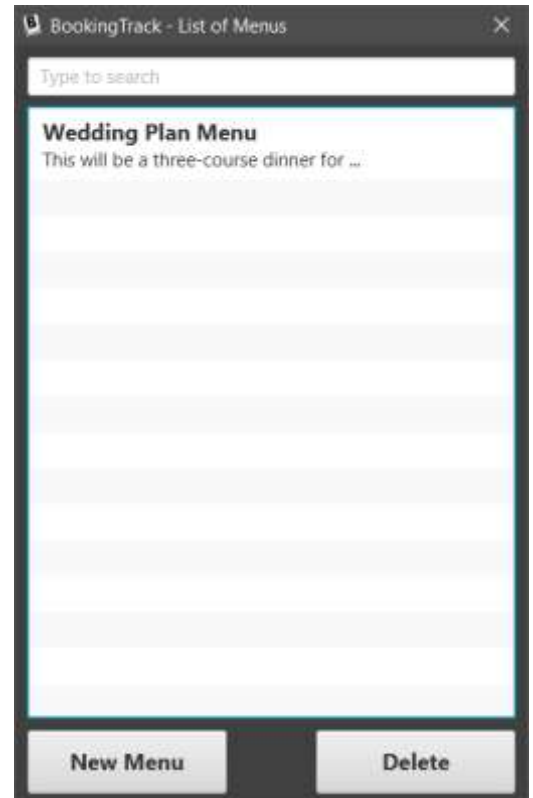
Creating or editing a menu brings up the main editing window.

The Menu editing window uses a slightly different structure. We still have space for a title for the menu and some details about its use or availability, but the rest of the window is taken up with a scrolling display that shows the details of each course as it is added.

Clicking on Add at the bottom of this screen will bring up a list of all the defined courses and allow one to be chosen.

Clicking delete will remove a highlighted course.

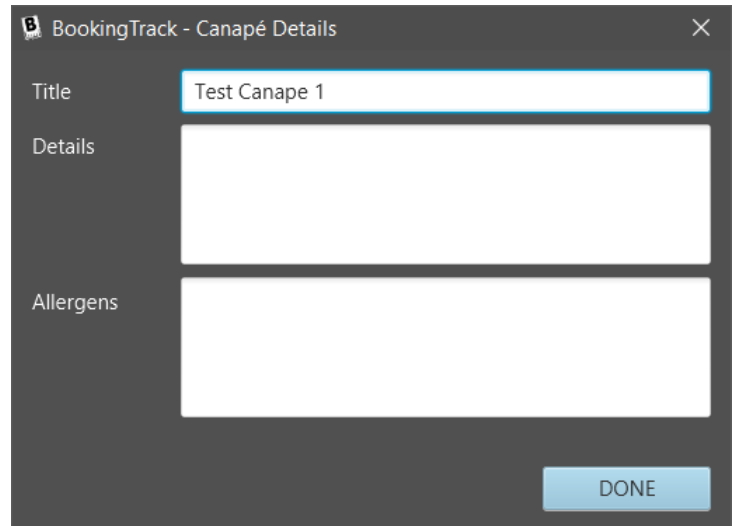
The right-click context menu provides options for changing the order of the courses within the menu structure.



Manage Canapés

Canapes are added to a simple list. Clicking on the menu button brings this list into view and allows entries to be created, edited and deleted.

Each entry has a title, description and allergy information. A simple editing screen allows these things to be changed easily.

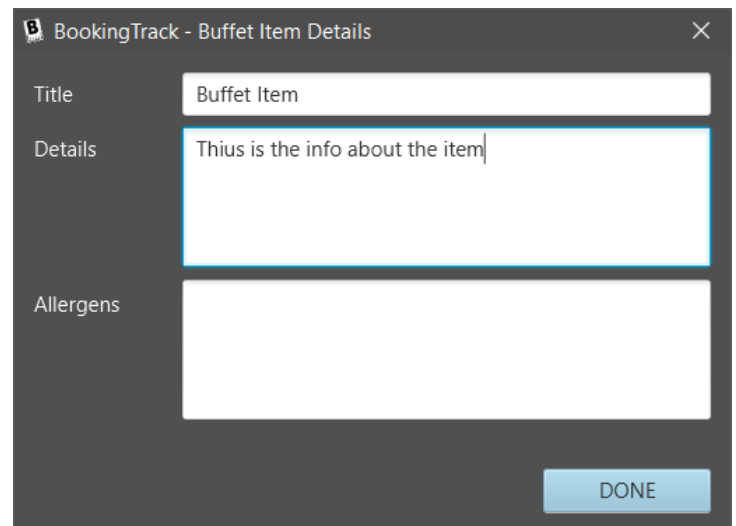


The screenshot shows a dark-themed dialog box titled "BookingTrack - Canapé Details" with a close button (X) in the top right corner. The form contains three input fields: "Title" with the text "Test Canape 1", "Details" (empty), and "Allergens" (empty). A blue "DONE" button is located at the bottom right.

Buffet Choices

Buffet dishes are added to a simple list. Clicking on the menu button brings this list into view and allows entries to be created, edited and deleted.

Each entry has a title, description and allergy information. A simple editing screen allows these things to be changed easily.



The screenshot shows a dark-themed dialog box titled "BookingTrack - Buffet Item Details" with a close button (X) in the top right corner. The form contains three input fields: "Title" with the text "Buffet Item", "Details" with the text "Thius is the info about the item", and "Allergens" (empty). A blue "DONE" button is located at the bottom right.

Client Enquiries

Every time a client – whether an existing customer or just a new enquiry – contacts the business, it should be logged within the Client Enquiries Database. Both incoming and outgoing contacts can be logged and there is no limit to the number of events that can be recorded.

Clicking on Client Enquiries in the main menu opens a list of all the clients currently registered in the system. This list gives basic contact details at a glance, as well as access to the full details and logs as required.

The search bar at the top of the screen responds instantly to typed characters. Just start typing the first or last name of the contact and the list will be updated in real-time.

As with other modules within BookingTrack, double-clicking on a client in the list will bring up the details window.

Clicking on Add New Client Contact at the bottom of the list will create a new entry and there are also additional options available from a right-click context menu.

[illegible]

Client Details

The client details screen stores basic information about the client. We have space for names, addresses, contact numbers and email address.

The lower half of the details screen shows a chronological list of the contacts that have been made with this client.

From here we can click on the buttons at the bottom of the window to record either incoming or outgoing communication events.

Double-clicking on an existing entry will open a read-only view into the selected contact event to allow reading of any associated notes.

Contact Logs

The actual contact log shows the date and the time of the contact, details of the staff member involved and the method of communication.

It is possible to indicate if the contact was successful or not here, and to make extensive notes about the event if required.

If you are reviewing an existing record then the DONE button will be disabled and no changes you make will be recorded. Contact logs are one-shot, recording an event at the time that cannot subsequently be changed.

This is to comply with data processing and auditing rules and regulations.

The screenshot shows a web form titled "BookingTrack - Contact Event Logging". The form has a dark grey header bar with the title and a close button (X). Below the header, there are several input fields and controls:

- Incoming**: A button or label on the left.
- Contact Made At**: A text input field containing "09:07".
- on**: A text label between the time and date fields.
- 18/Aug/2018**: A date input field.
- Recorded by**: A dropdown menu with a grey background and a downward arrow.
- Comms Method**: A dropdown menu with a light blue border and a downward arrow.
- Outcome**: Two radio buttons labeled "Success" and "Failure". The "Success" radio button is selected.
- Notes**: A large text area with a placeholder text "Your Notes Here...".
- Buttons**: At the bottom, there are two buttons: "Cancel" (grey) and "DONE" (blue).

Manage Events

An EVENT is a description of an event that is to be held at the business. Events allow us to specify the venue, number of guests, staff required and the type of event. Events also tie into databases that record further information about the event, including Setup Requirements, Menus, Buffet and Canapé details, and special dietary requirements and Drinks requirements.

Clicking on Manage Events from the main menu brings up a list of all the events in the system, optionally filtered by searching for the title or only showing uncompleted events.

All this is handled on the screen below.



Details about the event are entered here. The left half of the window shows the information about the venue, number of guests and general notes about the event and staffing. The type of event is recorded along with some status flags used for reporting purposes.

BookingTrack - Event Edit / View

Event Name: Crossroads Charity Ball

Event Notes: Any notes you need

Venue: Main Function Room

Guests: 91 Staff: 0

Staffing Notes: Notes about staff requirements

EventType: Private Function

Event Status: Completed

Account Paid: ☒ YES

FollowUp Done: ☐ YES

Menu Details

Charity Ball Menu

Charity Starters

1: Smoked Ham Terrine	50
2:	
3:	
4:	
5:	
6:	
7:	
V: Tomato & Basil Soup	0

Charity Mains

1: Parmesan Crusted Chicken	60
2: Braised Lamb	30
3:	
4:	
5:	
6:	
7:	
V: Spinach & Ricotta Tortellini	0

Charity Dessert

Service Start Time: 2:00pm

Buttons: DONE, Choose Menu, Delete, Chef's List

The right-hand side of the window has two tabs where any of the other requirements can be recorded. Clicking on the buttons at the bottom of these tabs allows us to create or review the entries in the lists.

Event Preparation

The preparation list is a convenient action list for the selected event. We can easily and quickly record an unlimited number of facilities, services, equipment or personnel that may be required for the event.

Details of lead times, contacts and the progress can be updated and reviewed at any time.

If you choose to “Assign Task To” to a particular member of staff, then that task can appear on the staff-members action list, printed from the Staff List Screen.

A right-click menu also provides the facility to produce a printable PDF report detailing the requirements for the current Event.

The screenshot shows the 'BookingTrack - Requirement' dialog box. It has a title bar with a close button. The fields include: 'Short Name' with the value 'Room Preparation'; 'Description / Notes' with a large empty text area; 'Contacts' with the value 'Internal'; 'Lead Time' with a value of '0'; 'Access Needed' with radio buttons for 'YES' (selected) and 'NO'; 'Progress' with radio buttons for 'Requirement Entered onto System' (selected), 'Necessary Contact Made', 'Action Confirmed', and 'Requirement Completed'; and 'Assign Task To' with a dropdown menu showing 'David Upton-Jones'. At the bottom are 'Cancel' and 'DONE' buttons.

Account Check

Although BookingTrack is not an accounting package, it is convenient for the system to keep track of the payment history for a given event.

To facilitate this, transactions can be logged to the event and are displayed in the Account Tab.

Each transaction simply records the amount, the type of the transaction, the date the transaction was processed and a short comment – useful for recording the payment method, etc.

The screenshot shows the 'BookingTrack - Transaction' dialog box. It has a title bar with a close button. The fields include: 'Transaction' with a dropdown menu showing 'Initial Balance'; 'Date' with the value '18/08/2018' and a calendar icon; 'Amount' with the value '0.00'; and 'Comments' with a large empty text area. At the bottom are 'Cancel' and 'DONE' buttons.

Main Menu

The Main Menu Tab allows the recording of menu options for the event, their quantities and choices.

Click Choose to select a menu for the event. Once it is displayed, you can click into the fields alongside each menu option to type in the number of covers for that particular selection. If there is only to be one choice from the menu, make sure all the other choices are set to zero.

You can add a Service Start Time in the field provided. This can be any text you need, not just a time.

Clicking on Chef's List will create a comprehensive report for the kitchen, detailing all the choices made for the particular event, the number of covers for each dish and giving details of any special requirements that have been entered.

(This report will also contain details about any Canapés and buffets that have also been set up for this event.)

As individual guests contact you with their dietary requirements, they can be entered in the lower section of this tab.

Buffet & Canapés

This tab allows us to manage the provision of canapés and buffets in a similar way to managing the menu.

To add a canapé or buffet item to the appropriate list, click the associated Add Item button and choose the required dish from the list displayed.

You can add Service Start Times in the field provided. This can be any text you need, not just a time. Use this space to indicate different numbers of covers if they are not the same as the size of the booking.

Special Diets

Use this screen to log any special dietary requirements for the guest at the event.

Information is entered on a guest by guest basis, with the name of the guest and any requirements that you need to list.

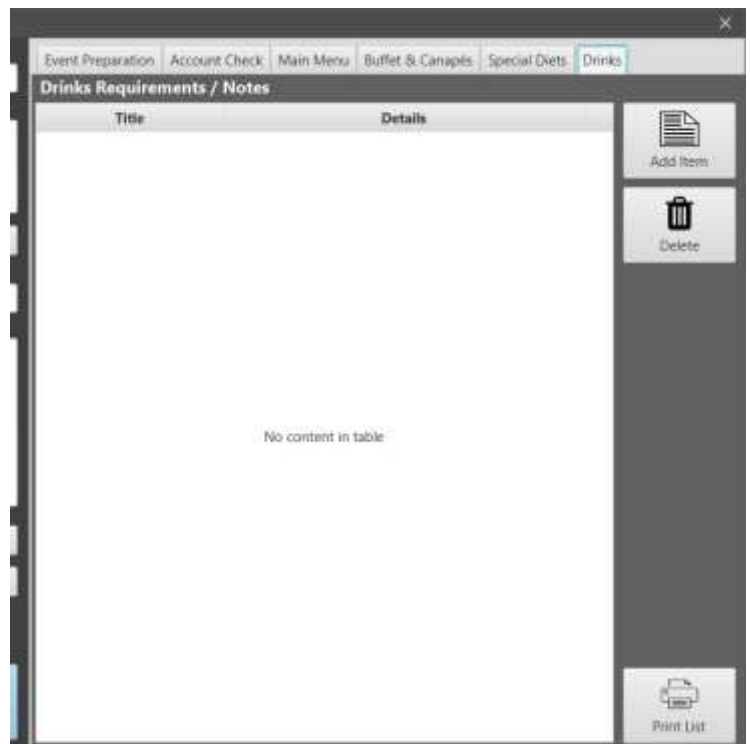
The details of the list are printed when the Chef's Report from the Menu screen is produced.



Drinks

If you need to specify special drinks options, then this is done on this tab.

Click the button to add an item, delete the selected item or produce a printable report that lists all the drinks options you have specified.



Bookings / Diary Planner

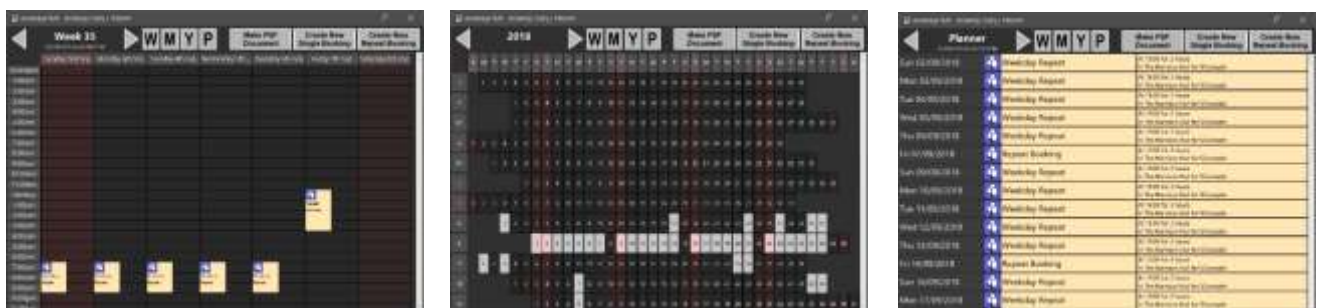


The Booking Calendar and its associated windows are the heart of the BookingTrack system. They provide at-a-glance confirmation of availability and upcoming events. The system provides a week, month or year view.

Clicking on W, M or Y will change the view between WEEK, MONTH and YEAR. Clicking on the arrows to the left and right of the displayed DATE will change the date in week, month or year increments as appropriate. Each of these three views gives a different amount of information about recorded bookings.

Clicking on P will bring up the Planner View. This view shows the upcoming three months in a bit more detail as a scrolling list.

Entries for a given venue are colour-coded to make identification easier. Similarly, there are a set of icons that are used in Week, Month and Planner view to indicate the type of event booked into that particular timeslot.



Double-clicking on a day within the calendar will display the list of bookings associated with that day. Double-clicking on a booking will take you straight to the editor window for that booking.

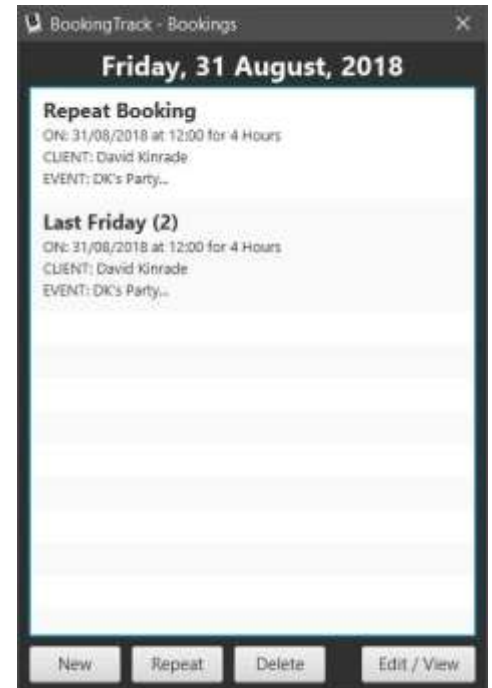
There are main buttons in the top right of the window to create new single bookings, repeat bookings and produce printable copies of the currently viewed screen. The Booking Calendar is the only window within BookingTrack that can be resized.

Booking Day List

The Booking Day List is the window that also opens when the program starts if there are booked events due for the current day. This screen lists all the bookings logged for the day selected.

Here more detail is displayed concerning the bookings that are on the given day.

The buttons at the bottom of this window give access to the creation of single and repeat bookings, as well as the ability to edit the currently selected booking. Double-clicking on a booking in the list will also bring the editor in to view.

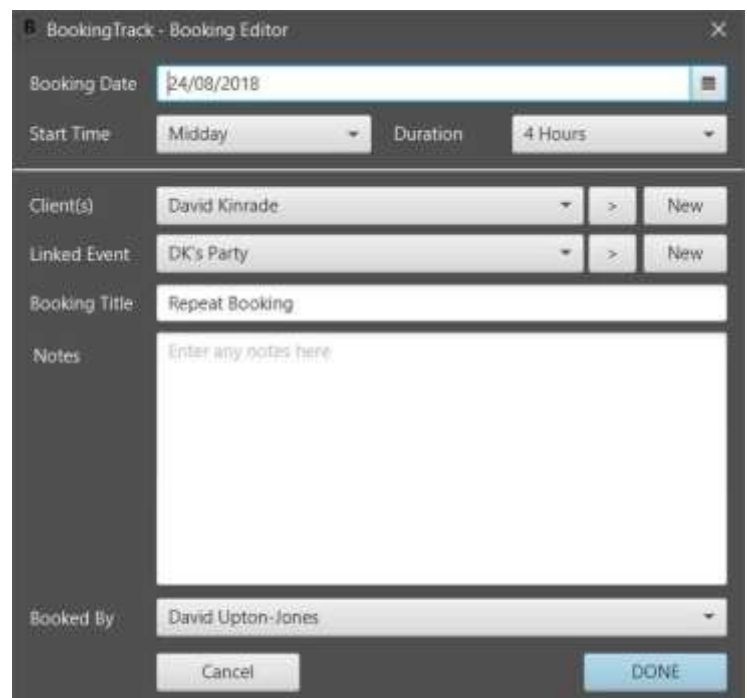


Booking Editor

The booking Editor screen links together all the constituent components of the system to match a booking to a particular client, event and time.

At any time, the client and Event details can be viewed from here by clicking on the arrows alongside the appropriate fields.

New clients and events can also be added from here by clicking on the appropriate NEW button on the right side of the screen.



Repeat Bookings

It is possible to automatically create repeating bookings at any time. These repeat bookings can be linked to a single event or have cloned events associated with them.

The main editing window is only shown when the booking is created and offers a range of different booking options that should cover the majority of automatically generated repeat requirements.

You can choose to repeat on the following criteria:

Day of Week	Repeat the booking on the same day every week. e.g. Every Monday
Weekday	Repeat on every weekday for a given number of weeks
Date in Month	Repeat on the same given numbered day in every month (1 to 28) e.g. on the 1 st of each month
First Day in Month	Repeat on the first named day of the month e.g. The First Friday, the First Sunday, etc.
Second Day in Month	Repeat on the second named day of the month
Third Day in Month	Repeat on the third named day of the month
Fourth Day in Month	Repeat on the fourth named day of the month
Last Day In Month	Repeat on the last named day of the month e.g. The last Friday in August may be anything from the 25 th to the 31 st .


All starting points are taken from the Booking Date specified. If, for example, the booking date specified is a Wednesday and you choose weekday, then the repeat will start on the Monday of the given week.

Reports & Transfers

Various reports specific to particular clients, events or bookings are available in-situ, often from a right-click option in a list or table. For more global reports, this option is provided to give access to key properties in paper form.

Fill in any options and then click on GO alongside the required report.

All reports are produced as PDF files and displayed immediately on the screen. You can choose to print the report or save it to a file for emailing or transfer.


BookingTrack - Produce Reports

Outstanding Account Report

Create a list of all outstanding accounts as a PDF file for printing or forwarding. Only accounts with a positive balance will be included.

GO

Accounts for Period

Tabulate all accounts for the period specified below. Any active account for the specified period will be included even if it opened or closed outside the period..

Start at

18/08/2018

End on

18/08/2018

GO

Client Contact List

Create a contact list from all the clients in the current database.

GO

Upcoming Bookings List

Produce a list of all the forthcoming bookings due in the time frame selected below.

☒ 3 Months
☐ 6 Months
☐ 12 Months

GO

Setup & Tools

There are various setup options available from here. Different graphics can be imported to customize the interface and printable reports. The database can be manually backed-up to an external file or restored from one here.

The settings screen allows you to specify automatic Backups, restores and even timed backups as required.



Graphics

Use this screen to import the two graphics files that BookingTrack uses.

The Main Menu Logo is the file that is used at the top of the main menu when the program is running.

The Printable Logo is used as a header file on all printable reports.

You can import either a JPG or PNG file. Click the existing image to open a file viewer to select the file you wish to use or, on Windows, drag a file onto the existing image.



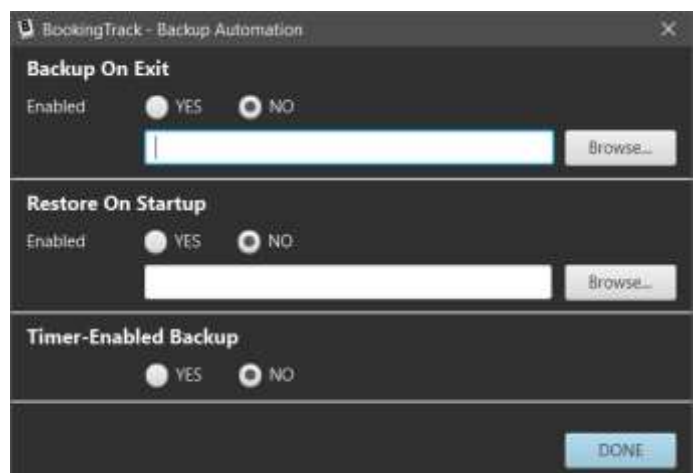
Automation

The automation settings allow us to specify how and when the database is automatically backed-up or restored.

Both Backup on Exit and Restore on Startup allow a file to be stored remotely from the system and accessed when the program is launched or closed.

Timer Enabled Backup further refines this with periodic automatic copies of the data being taken and stored in the remote location.

In theory this allows a second computer to access the database from the remote location, but only if the main system is closed down.



CloudView

BookingTrack can optionally display copies of its calendars online. These calendars are automatically uploaded via FTP every 15 minutes, reflecting near-live changes to the bookings.

Fill in all the appropriate details from your ISP to access the FTP server and specify the folders and filenames that you will access the information through.

The Public calendar is configured to only display the events created in a single specific category, marking all other events as private. This allows public viewing of the page for, for example, members of a club or organisation who have regular bookings.

Once turned on, CloudView works seamlessly in the background to update the pages whenever the program is in use.

The screenshot shows the 'BookingTrack - Cloud Calendar Settings' dialog box. It is divided into two main sections: 'Full Calendar Page' and 'Public Calendar Page'. Each section has fields for 'Folder', 'File Name', and 'Page Title'. The 'Public Calendar Page' also has a 'Bookings to Show' dropdown menu. At the bottom, there are radio buttons for 'Timer Enabled' (YES/NO) and a 'Months' dropdown menu. A 'DONE' button is located at the bottom right.

Section	Field	Value
Full Calendar Page	Folder	
	File Name	calendar.htm
	Page Title	Testing Private Calendar
Public Calendar Page	Folder	
	File Name	public.htm
	Page Title	Testing Public Calendar
	Bookings to Show	Masonic Function
Timer Enabled		<input checked="" type="radio"/> YES <input type="radio"/> NO
Months		4

Web Setup

The web setup screen is used to manage access to the FTP server for the Web and CloudView system. On this screen we can specify the header graphic for the CloudView pages and all the FTP connection details needed to access the server and upload files.

The FTP send button sends the currently selected graphic to the server for ongoing use.

The screenshot shows the 'BookingTrack - Web Server Settings' dialog box. It features a 'Header Graphic' section with a preview of a logo for 'WOODBOURNE HOUSE'. Below this is the 'Server Login Information' section, which includes fields for 'Web Address', 'FTP Server', 'User Name', and 'Password'. At the bottom, there are 'FTP Send' and 'DONE' buttons.

Section	Field	Value
Server Login Information	Web Address	
	FTP Server	
	User Name	
	Password	

Purge Data

Purging data allows you to specify a date and then erase all bookings, events and associated data from the system before that cut-off date.

Use with caution, as purging cannot be undone. Make a backup of the database before performing this action.

Import Dishes

We can use the simple Import Dishes option to quickly populate the dishes database from an existing spreadsheet or database via a CSV file.

Clicking this option will bring up a window where we can specify the file that is to be imported. Once a file is selected, the number of lines of data available will be displayed. Clicking on START will begin the import process and, if there are a large number of items to process, display a progress bar to show you how long it may take. The window will close once the import is completed.



The import process is programmed to not allow duplicate named dishes to be created. This means that you can run the import repeatedly, for example after making changes to the external database, and it will simply update the BookingTrack data for each entry.

The CSV file must comply with the following settings:-

The first line is a header, containing column names that are ignored, but assumed to be "name", "short description", "long description", "course type", "vegetarian"

If the Vegetarian column contains a Y or V then it is assumed to be a vegetarian dish. It is not case sensitive.

Course types include "starter", "sorbet", "fish", "main", "dessert" and some variations in common catering use. Again, these are not case sensitive.

Import Clients

We also have a similar import function to import client contact information from other programs.

It works in exactly the same way as importing dish data, but the data is expected to be in the following format:-

The first line is a header, containing column names that are ignored, but assumed to be "name", "address", "landline", "mobile", "email"

Import Buffet

This import function allows for the reading of a CSV file that contains information about Buffet Menu items. It is very similar to importing Dish data, but has just three fields in the CSV file.

As before, the first line is the header, and the column names are ignored. They are "Title", "Details", and "Allergens".

Import Canapes

This import function allows for the reading of a CSV file that contains information about Canapé Menu items. It is very similar to importing Dish data, but has just three fields in the CSV file.

As before, the first line is the header, and the column names are ignored. They are "Title", "Details", and "Allergens".

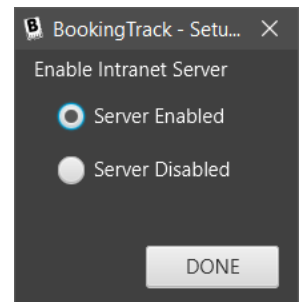
Local Server & Intranet Access

BookingTrack has a built-in Intranet Server that can be used to enable intranet access (access to other computer / tablets / phones on the local network). The server uses a universal UDP-based protocol to keep track of the various systems accessing the data.

The Intranet server currently allows multiple users to access the Client / Contact database structure at the same time. Remote users can view the list of clients, edit their details and create/view contact events from any connected device. There are remote clients or Desktop PCs, Windows Tablets and also for Android-powered Mobile Phones and Tablets.

When BookingTrack is first started, the Intranet Server is not enabled. There is an option on the Setup & Tools menu where you can enable it. Once enabled, it will remain active whenever the BookingTrack program is running.

On the main BookingTrack menu, there is an option to display the Intranet Server Log window. This window can be kept open if needed and displays details of incoming and outgoing data requests on the network. It also shows the current IP addresses and port numbers that are used by the server.



NOTE: If the server is enabled, it will attempt to keep track of all clients logged into the system. You cannot close BookingTrack if there are clients logged into it. Data integrity is usually maintained across the network without issues, but there are circumstances where data may be damaged if a client is not correctly closed when it is no longer required. We recommend that a client is shut down when not needed. It only takes a couple of seconds for it to connect and access the current data.

The Desktop Client Database Terminal

The Terminal is a stand-alone application, written in Java, which enables remote access on any Windows, Mac or Linux based client PC or tablet. It connects to the BookingTrack server over the local network and displays data from the client database.

Its interface is almost exactly the same as the client database module within BookingTrack, just starting from a main screen that shows a list of available contacts.

Double-clicking on an entry in the contact list will request data about that contact. All the subsequent screens are the same as those found here in BookingTrack.



The Android Client Database Terminal

The Android Client software works in a very similar way to the PC desktop clients. Once connected to the local network, it can access, view and edit the client database on the main system remotely.

Details of clients can be viewed, edited and saved. Contact events can be logged and viewed as well.

The android client is lightweight and versatile, capable of running on both tablet and phone devices.

Activity

07:32

Add New Client

Crossroads Care

Test Client

Chef 192.168.1.104 Server 192.168.1.100

BookingTrack Clients

15:20

Name(s)

Crossroads Care

Address

Unit 5B & 6B
Eden Business Park
Cool Road
Braddan IM4 2AY

Landline

673103

Mobile

Email Address

kharris@crossroadsiom.org

Staff Member

Sammy Dooley

Contact Status

Booking

Date Created

05/09/2018

Out on 29/09/2018 at 05:36
By Service Supervisor
In on 29/09/2018 at 05:26
By David Upton-Jones
In on 29/09/2018 at 05:16
By Chef
In on 28/09/2018 at 19:46
By David Upton-Jones

Incoming Outgoing Save