
MANUAL

Ski & Customer Information System (SKI)

Wessels Application Development

version 2012-5



Wessels Application Development
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Ski & Customer Information System (SKI)

THE Planning and Customer Relations Management System for Indoor Ski and Snowboard Centres

1 BASIC INFORMATION

SKI fully supports the commercial activities (planning, reservations, customer relations) of the indoor ski slope centre.

SKI contains the following components:

- lesson planning overview per day, week, month (for 1, 2 or 3 tracks)
- reservations (single hour or recurrence)
- year schedule of holidays, closed hours, private lessons, snowboarding and special offer-hours
- customer relations management (mailing via MS Word, email, selection filters)
- billing
- summary invoices
- overview numbers of lessons per week, month, quarter (management reporting)
- general settings (number of tracks, color settings, scale, invoice layout, etc.)
- master data (reservations types, invoice/reasons/groups descriptions etc.)
- backup / Restore functionality (also check last backup-functionality)

2 NAVIGATING

Use the **mouse** for navigating and controlling the application. However, each mouse-action has an equivalent on the keyboard. The most important **key-combinations** are:

- combination of the **Alt**-key plus the underlined character
- **Tab**-key to jump to the next field or button
- **Shift-Tab** to return to a previous field
- **Enter** to submit a choice, some cases use enter to jump to next field
- **cursor keys** (arrows) to scroll through a list
- **Alt-arrow down** to open a selection menu

The **Enter**-key is equivalent to **doubleclicking** the **left mousebutton**. For a complete list of keyboard shortcuts *Appendix C*.

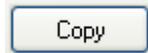
2.1 Confirming, cancelling actions

On almost every input screen you will find the buttons **New**, **Delete**, **OK**, **Cancel**.



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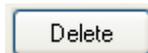
THE Planning and Customer Relations Management System for Indoor Ski and Snowboard Centres



[Copy] is used for copying a customer card, for example to enter a new family member.



[New] to add a new item



[Delete] to delete an item



[OK] to store changes



[Cancel] to cancel current actions

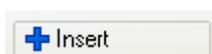
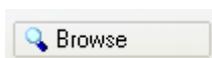
Note!

The buttons **[OK]** and **[Cancel]** are greyed out (inactive) as long as no changes are made. When data is being changed or added, these buttons become black (active).



2.2 System Mode

The current status or mode of the system can be checked on the value in the field left to the button **[Copy]**.

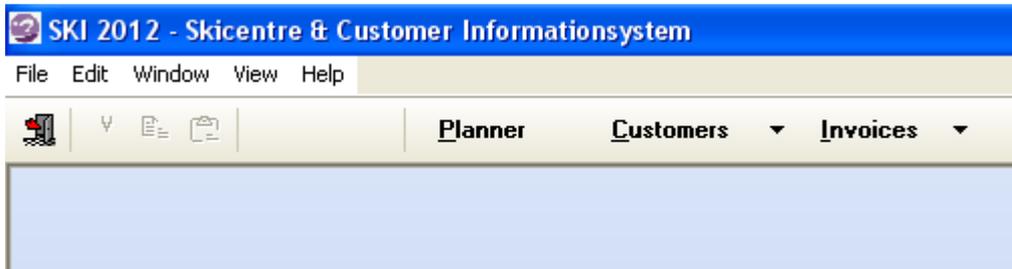


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3 THE MAIN SCREEN

SKI opens with the following screen:

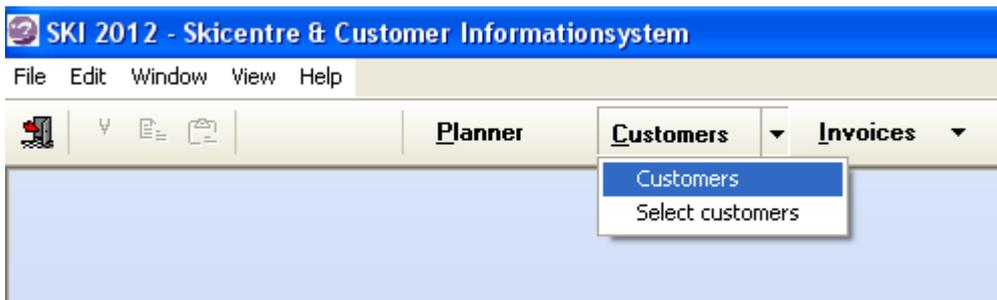


[Planner]

Module **Planner** gives an overview of all planned lessons and hours available. New reservations can be made using this screen.

[Customers]

Module **Customers** provides options for search, add, view and modify customer data.

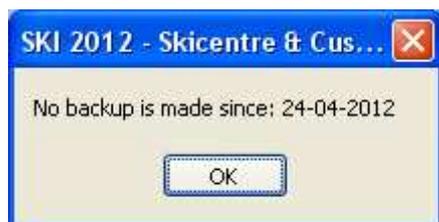


[Invoices]

Module **Invoices** provides access to invoices per customer or through various filtering options. New invoices are generated from this screen.

The **File dropdown** also provides access to the 3 main modules plus access to general settings, user preferences, master data maintenance, the Teacher module, Agenda (year) planning options etc.

When starting **SKI** the following message may appear:



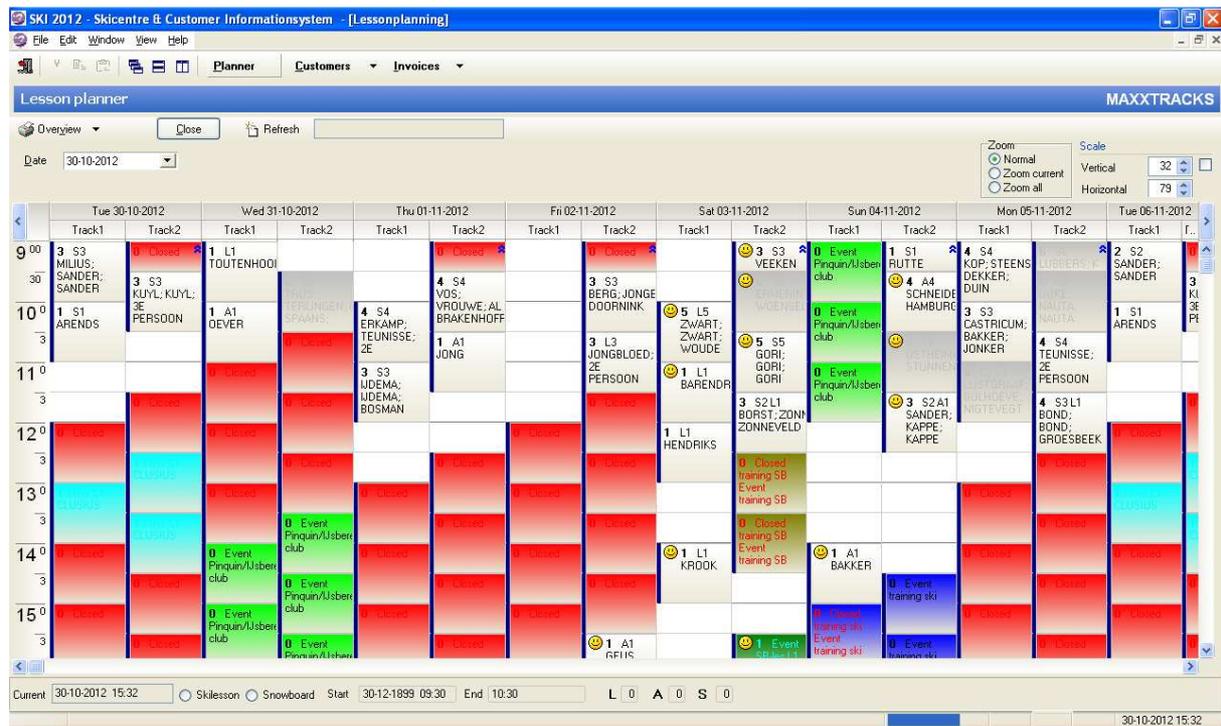
This message is subject to a user preference. Go to **File --> General Settings** tab **Database**. Here you will find the option **Check**. See *Chapter 9 General Settings* for further information on this feature.

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4 PLANNING LESSONS

4.1 The planning screen



The planner gives a quick overview of free, blocked, cancelled, full, ski and snowboard hours; each type of hour has its own unique color. The colors can be adjusted according to the users preferences, go to **File --> General Settings** tab Planner. Double click the mouse on a booked or empty hour to make a reservation.



On the bar below the planning screen, detailed information is displayed on the hour where the focus is on. The current date and time, type of lesson (ski or snowboard), start and end of the lesson and the occupation of the lesson grouped by level.

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Lesson planner	
Overview	
Date: 30-11-2012	
Close Refresh	
Date: 30-11-2012	
Fri 30-11-2012	
Track1	Track2
9:00	0 Closed
9:30	5 S3 L2 BERG; JONGB HELDER; DOORNINK
10:00	3 S2 L1 JONGBLOED; BERTENS; BERTENS
11:00	1 L1 R&R FNR
Sat 01-12-2012	
Track1	Track2
9:00	1 A1 GROOT
9:30	3 L3 ZWART; ZWART; WOUDE
10:00	3 S3 VEEKEN!
10:30	5 S5 GORI; GORI; GORI

The field **Date** provides for a quick switch to another day / week. In the title bar above the planning grid you find date and tracknumber. With the blue left and right arrows in the title bar you can jump forward or backwards. How many days forth or back depends on setting '**Number of days visible**'. Go to File → General Settings → tab lesson planning for adjusting this setting.

Lesson planner	
Overview	
Date: 25-04-2012	
Close Refresh	
Date: 25-04-2012	
wo 25-04-2012	
Track1	Track2
9:00	
9:30	
10:00	1 S1 WESSELS
10:30	
11:00	
11:30	
12:00	

Move the mouse over a planned lesson for detailed information. Double-clicking on an hour to make a reservation. See 4.3 for more details on making reservations.

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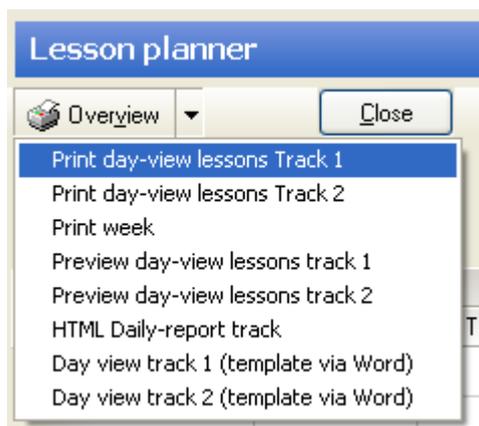
In the upper right corner of the screen you will find a number of options for personalizing the planning screen. Use the option **Scale** for adjusting the format / number of lessons blocks in order to fill the planning frame in the most optimal way.

The option **Zoom** enlarges the lesson blocks for better overview of the bookings, use **Zoom all** enlarge all blocks, use **Zoom current** for zooming in on the current active lesson block.

4.2 Generating lessons overview

Click on the arrow button next to button **Overview** for generating overviews in various formats.

The options in this menu are determined by the preference setting "Use Templates", see **File --> General Settings --> tab General**. If you choose to use only the default templates of SKI, then the options using Word will be missing in this menu.



Print day overview lessons track 1 / 2

Prints an overview of all lessons on a day per track, standard layout

Print week overview lessons

Prints an overview of all lessons per week, standard layout

Preview lessons track 1 / 2 per day

Displays an overview on screen - all lessons per day per track

HTML Daily report track

Day overview in HTML output, used for displaying lessons information on screen along the tracks

Day View track 1/2 (template via Word)

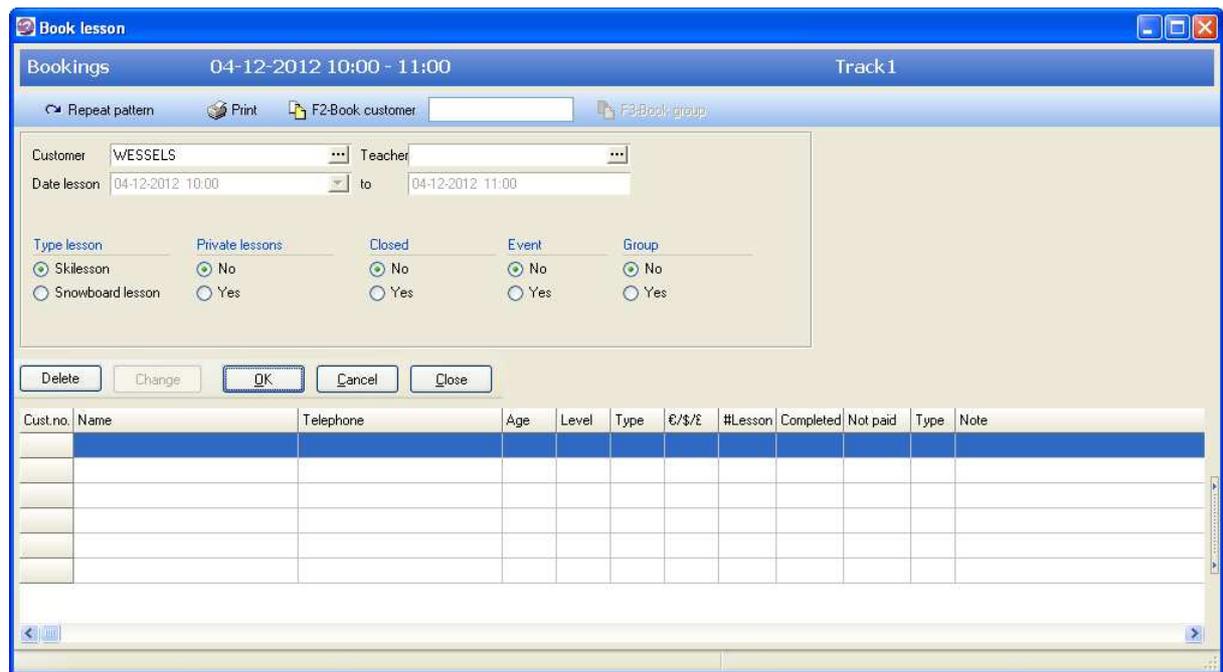
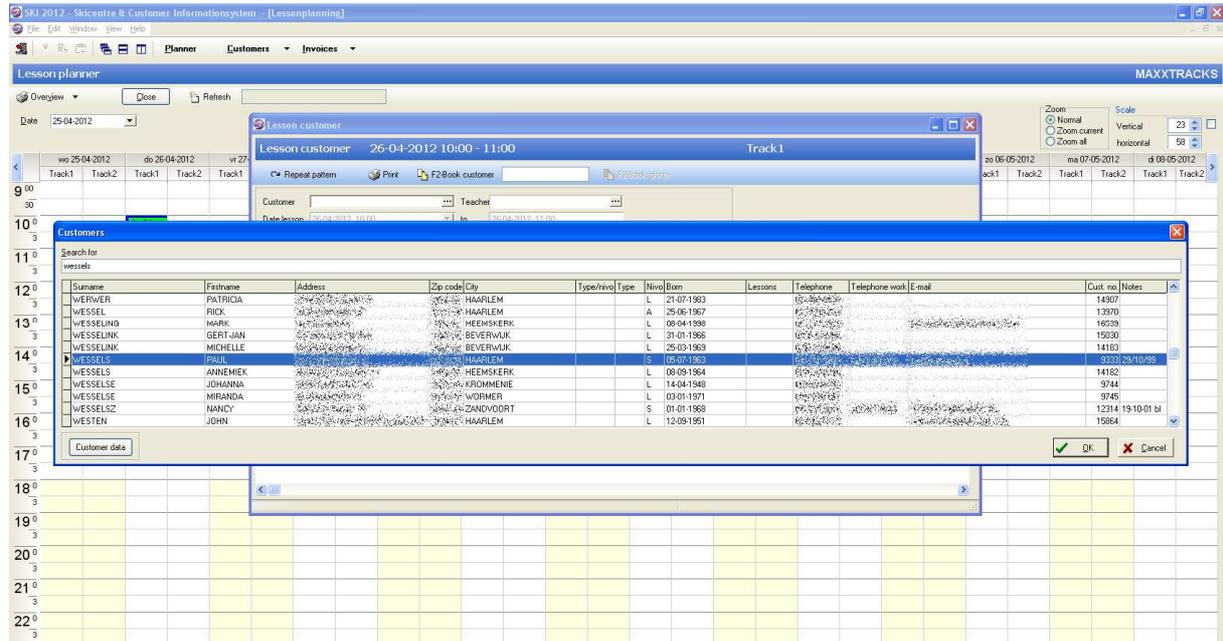
Day overview in customized layout (using Word template) per track

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4.3 Making new reservation

Doubleclick on the required hour in the lesson planner, the screen **Book Lesson** will open. Enter the name of the customer. The hits are displayed in subscreen **Customers**. Navigate with the arrow to the right customer. If the customer is not found then click button **New** to add the new customer. Enter the customer information and click button **[OK]** to confirm the entry and return to the list. Select the newly added customer.



Click **[OK]** to make the reservation complete.

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Cust.no.	Name	Telephone	Age	Level	Type	€/\$/£	#Lesson	Completed	Not paid	Type	Note
9333	PAUL WESSELS	023-5511911	49	S		0	330	208	17		

The customer is now added to the list of customers booked on this particular lesson. By double clicking on the customer in this list, the customer card is opened.

The following columns are visible in the list: Name, Phone, Age, Level, Type, EUR, #Lesson, Completed, Not paid, Type (Ski or Snowboard) and Note.

Important!

Column **EUR** provides information on invoices and customer payments.

Red sum = *OPEN invoice amount (not paid)*
0 = *an invoice is present and paid*
Blank = *no invoice present*

Adjust the type of lesson by using the following options:

Type lesson

Skilesson
 Snowboard lesson

Ski or snowboard lessons

Private lessons

No
 Yes

Private lesson

Closed

No
 Yes

Close lesson after this booking

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Event

No
 Yes

Lesson pre-reserved for special event

Closed	Event
<input type="radio"/> No	<input checked="" type="radio"/> No
<input checked="" type="radio"/> Yes	<input type="radio"/> Yes
Reason <input type="text"/>	

For options lesson **Closed** or lesson **Event** add a reason / description.

Group

No
 Yes

Prereservations for groups

F2-Book customer

 F2-Book customer

Using key **[F2]**, the selected customer is kept in memory. This option can be used to book the customer quickly at random hours in the lesson planner.

F3 Book Group

Group

No
 Yes

By pressing the **[F3]**, the group selected from the list is kept in memory (feature not yet available!).

4.4 Multiple reservations using pattern

With button **[Repeat pattern]** in the screen **Book lesson**, multiple bookings can be made in one action, according to the defined pattern.

Book lesson

Bookings 04-12-2012 10:00 - 11:00

 Repeat pattern  Print  F2-Book customer  F3-Book group

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Enter the number of lessons (which includes current hour), the required repeating pattern and press the button **[Search]**. The possible hours are displayed on screen, verify if the suggested hours are suitable for this customer. Remove the mark in field **Choose** to remove a suggested hour from the booking list.

If visually checked, click **[OK]**. The hours with mark **Choose = ON** are booked for this customer.

Tip: If one hour is full or closed, increase the number of lessons in order to let the system select more options.

Book lessons - repeat pattern

Book multiple lessons PAUL WESSELS

Print

Customer: PAUL WESSELS

Start date lesson: 04-12-2012 10:00 End date:

Number of lessons:

Repeat: Daily Weekly

Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

Private lessons: Yes No

Group: No Yes

Type lesson: Skilesson Snowboard les

Delete Search OK Cancel Close

Found data

Choose	Date	Number	L	A	S	Status	Track		
<input type="checkbox"/>									

Confirm

Book lessons on available and selected days?

Yes No

Confirm the question by clicking on **[YES]**. The number of booked lessons is shown in a message. Please note, this is the total of booked lessons minus the current hour.

SKI 2012 - S...

Booked lessons: 11

OK

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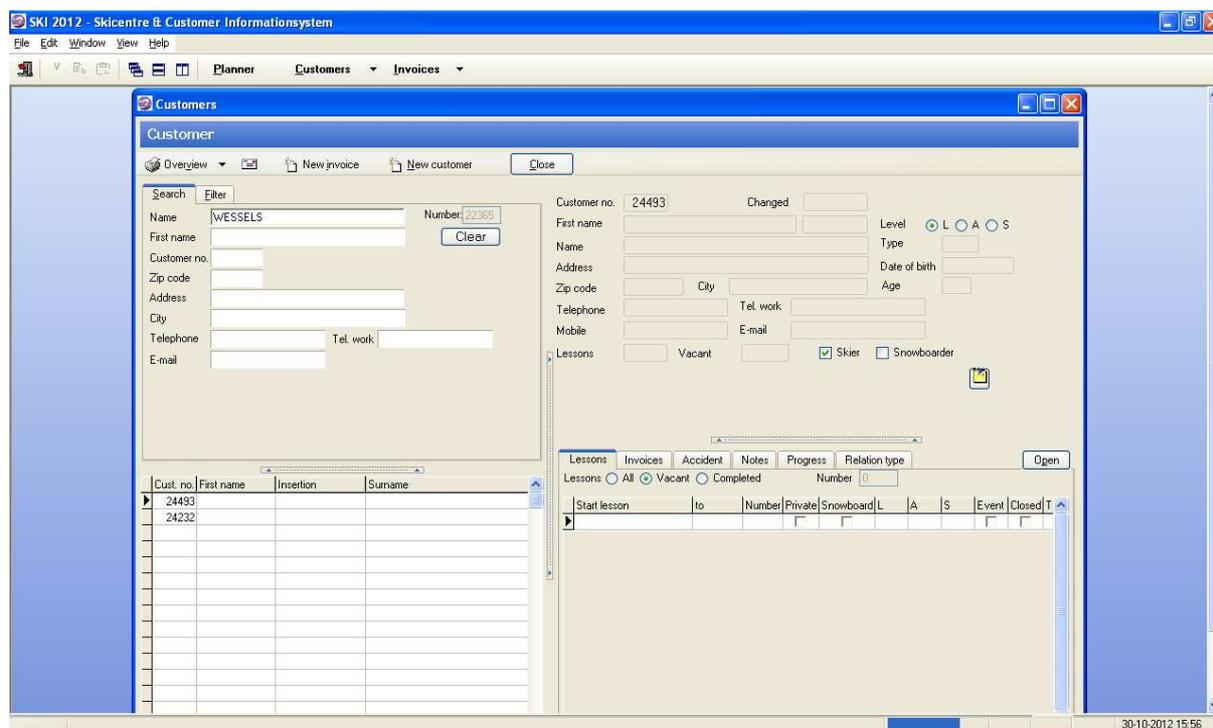
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5 CUSTOMERS

Choose button **Customers** on the main screen or via the File menu → Customers opens the screen **Customer data**.

5.1 Search customer

There are several (combinations of) fields to search for the right customer: full name, customer number, zip code, address, city, telephone and email. Once started with typing values in one of the search fields, the hitlist is built up and refined by the characters typed. The result appears bottom left on screen, the customer at the top of this list is presented fully in the right part of the screen. The name of this customer is shown in the blue title bar.



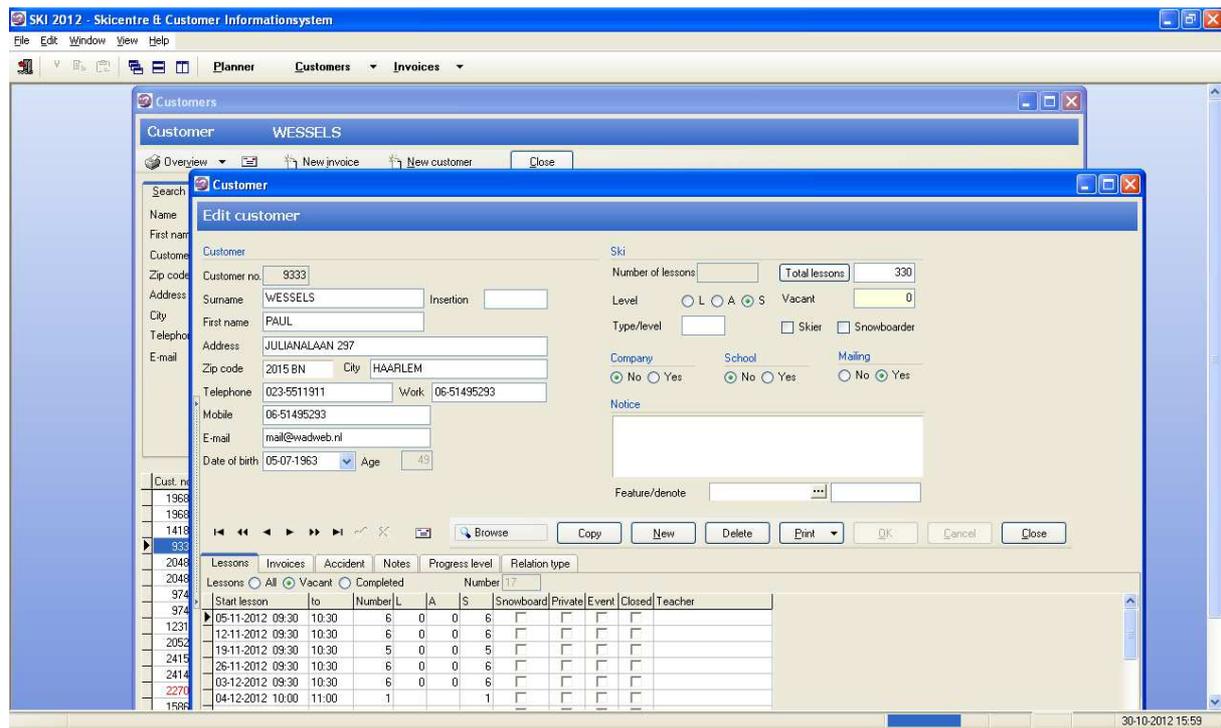
5.2 Edit/view customer

Put the focus on the requested customer in screen **Customer** and press **[ENTER]**. The screen **Edit customer** opens. All customer data can be viewed and updated in this screen.

Tabs *Lessons*, *invoices*, *Accident*, *Notes*, *Progress*, *Relation Type* are also accessible directly from the previous screen **Customer** (middle right screen). Click on the tab, press **[Enter]** or doubleclick on an item in the presented list and the corresponding data will be presented.

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5.3 Add new customer

Click on button **New customer** in screen **Customer**. The screen **Edit customer** opens.

Depending on the setting in **File** → **General Settings** → tab **General** displays the customer information in upper- and / or lowercase.

The left side of the screen contains general information on the customer (name, address etc). The right part of the screen involves data related to type of customer, level, the type of relationship etc.

Customer

Customer no. 9333

Surname WESSELS Insertion

First name PAUL

Address JULIANALAAN 297

Zip code 2015 BN City HAARLEM

Telephone 023-5511911 Work 06-51495293

Mobile

E-mail mail@wadweb.nl

Date of birth 05-07-1963 Age 48

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Ski

Number of lessons Total lessons

Level L A S Vacant

Type/level Skier Snowboarder

Experience levels

Default there are three levels at which the customer can be classified in terms of experience: **L**,earning **A**llround, **S**portive. The field **Type / level** gives you the possibility to add your own code or level indicator to specify the experience of the customer.

Advanced experience registration

If there is a need for a more extensive form of experience registration, then switch on the module Progress. See for more information subheading **Tab Progress**.

Ski or Snowboard

One can indicate whether the customer is following ski lessons or snowboard lessons. Also useful information for making selections.

Ski

Number of lessons Total lessons

Level L A S Vacant

Type/level Skier Snowboarder

The field **Total Lessons** shows the total number of lessons that the customer has booked/attended.

Company, school, mailing

Specify whether the customer is part of a **school** or **company** and whether this customer has agreed to receive **(e-)mailing**.

Company No Yes

School No Yes

Mailing No Yes

Notice

Use field **Notice** for important notes that require to be seen immediately by opening the customer. To build up a history of notes (information you want to keep in your database but no need to show this information each time you open up the customer) use the tab **Notes**. In this tab notes are ordered by date and by topic.

Notice

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Feature

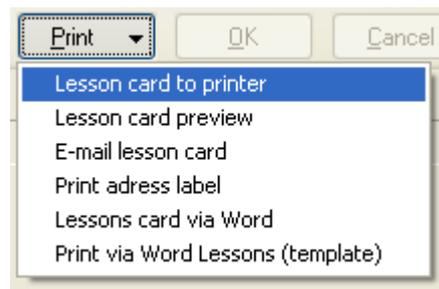
To divide your customers into groups, enter a remark here or choose a prefixed group from the list. This option may come in handy by making selections for mailings.



Feature/denote ...

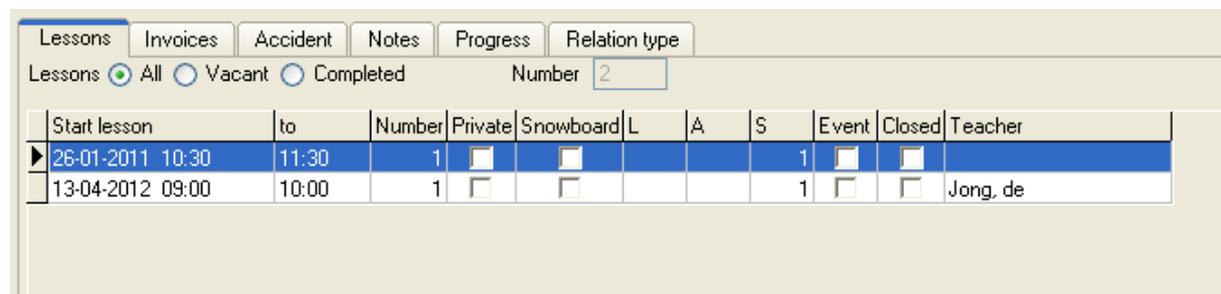
Printing lesson card

Click **[Print]** or click on the arrow down for various options to print the customer information.



Tab Lessons

In this tab, an overview of the lessons of this customer. Filtering possible on show **All**, **Vacant** and **Completed**. If only the lessons of the current season must be viewed through these filters, go to File --> General Settings--> General and fill in the date from-till **current season**.



Lessons Invoices Accident Notes Progress Relation type

Lessons All Vacant Completed Number

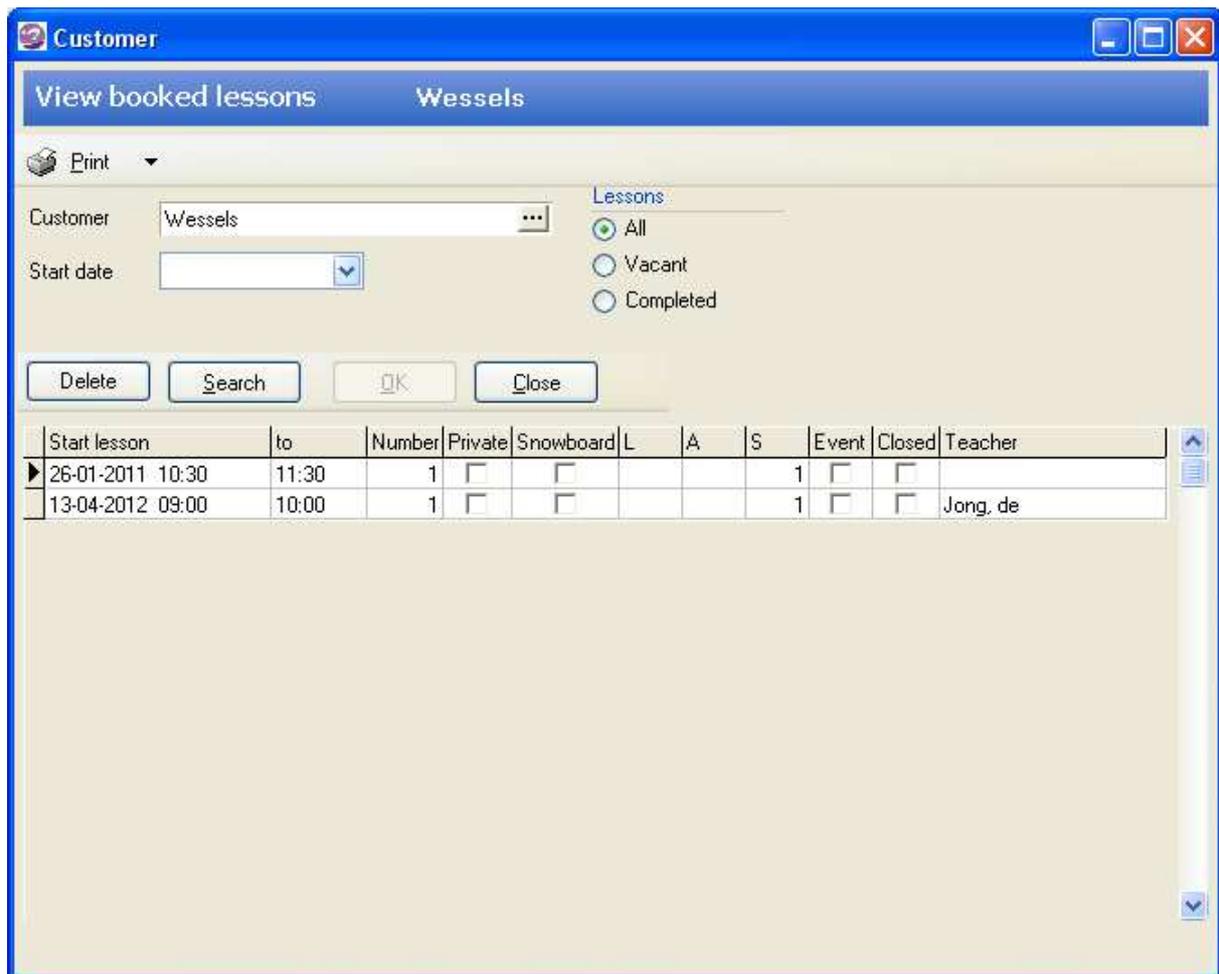
	Start lesson	to	Number	Private	Snowboard	L	A	S	Event	Closed	Teacher
▶	26-01-2011 10:30	11:30	1	<input type="checkbox"/>	<input type="checkbox"/>			1	<input type="checkbox"/>	<input type="checkbox"/>	
	13-04-2012 09:00	10:00	1	<input type="checkbox"/>	<input type="checkbox"/>			1	<input type="checkbox"/>	<input type="checkbox"/>	Jong, de

Doubleclick or press [enter] on a lesson to open the screen **View booked lessons**.

In this screen you can search for lessons or remove lessons. It is not possible to book new lessons, this is only possible through the planning screen.

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Tab Invoices

This tab provides an overview on invoices for this customer. Records presented in **red** indicate invoices not yet (fully) paid.

Bookdate	Invoice no.	Vacant	Description	Invoice amount	Net	VAT	Paid	Type	Date paid
12-04-2012	20120412161610	0,00	Seizoens kaart (24 lessen)	425,00	400,94	24,06	425	SEIZ	12-04-2012
08-03-2012	20120308151508	225,00	test	425,00	425,00	0,00	200	SEIZ	08-03-2012
15-08-2007	20070815141426	0,00	seiz 07-08 JZ	425,00	400,94	24,06	425	SEIZ	08-09-2011
05-03-2007	20070305095621	0,00	combicursus 2007 Ph	149,00	140,57	8,43	149		26-03-2007
27-11-2006	20061127103324	0,00	sl8 11-12-2006 Ph	169,00	169,00	0,00	169		11-12-2006
03-09-2006	20060903152338	0,00	sl 8 11-9-06 nn	169,00	169,00	0,00	169	SL8	18-09-2006
26-08-2004	20040826115707	0,00	sl12 06-0-04 bj	193,50	182,55	12,17	193,5	SL12	01-11-2004
11-03-2002	2003111243	0,00	zomercursus 2002 ar	175,00	175,00	9,91	175	ZOMER	23-04-2002
17-12-2001	2012171118	0,00	04/01/02 sl12 gl	203,00	203,00	11,49	203	SL12	04-01-2002
09-09-2001	2009091201	0,00	sl12 01/10/01 ar	203,00	203,00	11,49	203	SL12	01-10-2001

By double-clicking or [enter] on an invoice line the invoice screen opens.

Tab Accident

If on the track an accident has occurred then you can enter this information via the tab **Accident**. A variety of casualty notes can be made. Press the button **[New]** to create a new accident.

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Customer

Accident Wessels

Date: 26-04-2012
Teacher: Bas de Jong
Description: customer has fallen and hurt shoulder
Characteristics:
Injury: Shoulder
Doctor: Dr. John
Notice teacher: Advice to see the Doctor

Attention: No Ye
Hospital: No Ye
Seriousness: 0
Done: 26-04-2012

Buttons: Delete, New, OK, Cancel

Date	Teacher	Description	Injury	Characteristics
* 26-04-2012	Bas de Jong	customer has fallen and hurt shoulder	Shoulder	

Tab Notes

Use tab **Notes** to store relevant customer information by date and by subject. The last entered note can be shown at the lesson planning / the Lesson, however this depends on the settings of the template.

Press the button **[New]** to create a new note to enter and confirm with **[OK]**.

Customer

Notes Wessels

Date: 26-04-2012
Subject: Change date of lessons
Memo: Paul wants to change the date of 2 lessons...]

Buttons: Delete, New, OK, Cancel

Date	Subject	Memo
* 26-04-2012	Change date of lessons	(Memo)

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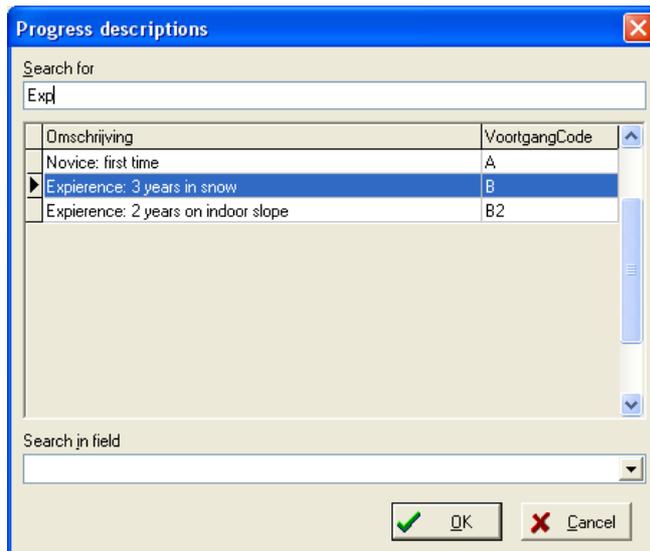
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Tab Progress

If there is a need for a more extensive form of registration of experience of the customer, then switch on the module **Progress**.

Step1. Go to File --> General Settings --> tab General. Set **Progress module is active** YES.

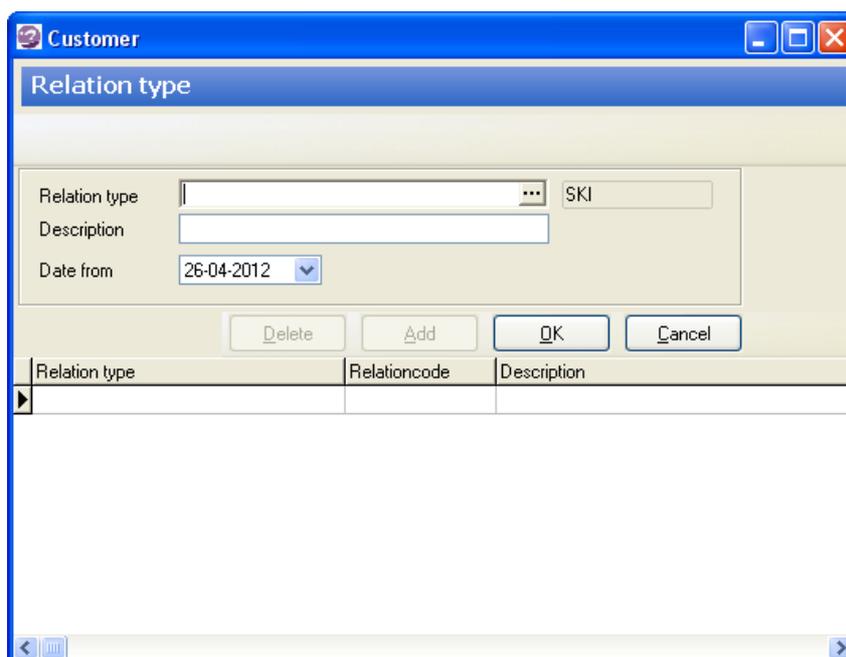
Step2. Go to File --> Basic data --> tab **Progress Descriptions**. Enter your codes and descriptions.



Tab Relation Type

For registering other relation types besides School and Company use tab **Relation Type**. Double-click in the list of relations or press [enter], the screen **Relation Type** opens. Press the button [Add] to add a new relationship, confirm with [OK].

Enter new relation types in **File** → **Basic data** → tab **Relation Types**



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5.4 Select Customers

Choose option **Select Customers** for making your selections from the customer database.

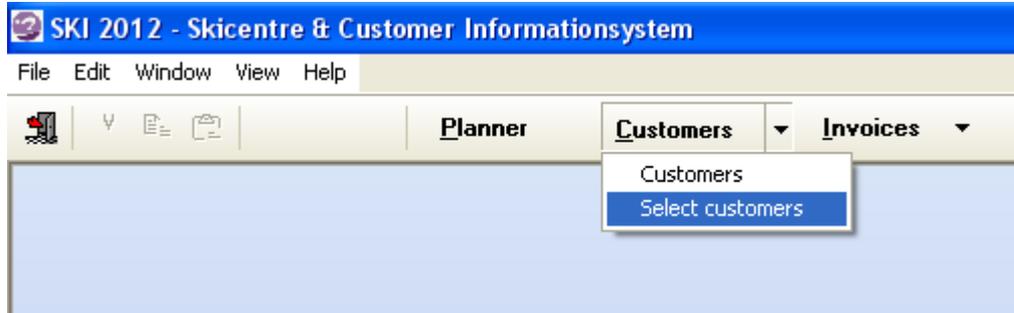


Fig. 54a

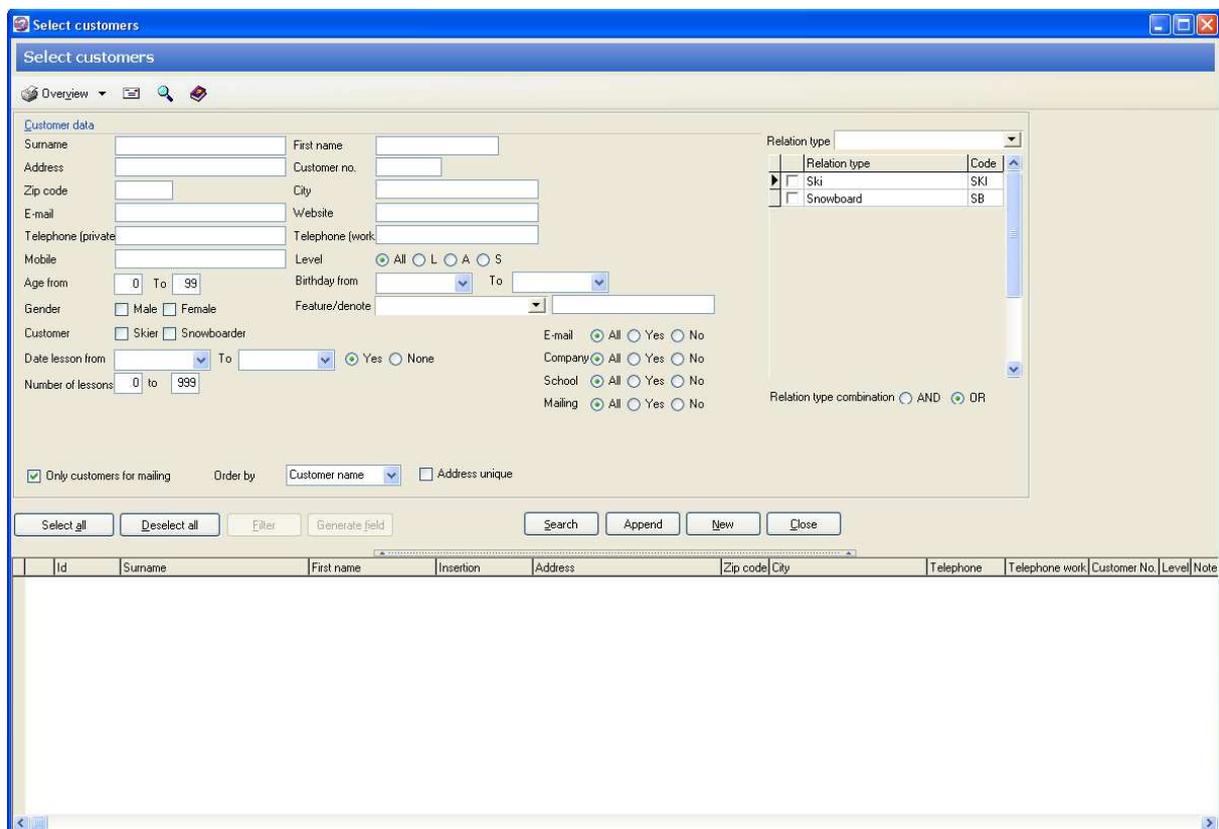


Fig. 54b

Selections can be made by filling one or more search fields (name, address, etc) or to click (gender, level etc). Use % as wildcard in the search (example: Johnson%). After entering the desired selection criteria press button **[Search]** (hotkey Alt-S). With button **[New]** (keyboard shortcut alt-N) all criteria are cleared and a new selection can be made.

Is the hitlist with customers short, the list appears on the screen below the search fields. If the list is long, it automatically pops the search part of the screen and the list shown in its full length.

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Search list open / collapse

Is the focus in the list to a customer (customer record is active), click on <Backspace> to return to the original search screen.



Otherwise, click on the dotted line to switch between client list increased and the original search screen. By moving the cursor on the dotted line, hold and drag to the size of the two parts of the screen to your own preferences.

To customer data

By double clicking on a customer in the list go directly to customer data.

Only customers with email and / or mobile number

Enter a double wildcard (%%) in the fields email and / or mobile number in order to select only those customers with fields email address and / or mobile number filled.

Only customers for mailing

Use this option to check for customers that have agreed on receiving mailings (on the customer card field Mailing = Yes)

Unique address

If this option is checked each address is retrieved just once, even though there are several people at the same address in the database that meet the selection criteria. Only the fields name, address, zip code and city are retrieved. This option can be used to send ONE letter / message per address. Note: The customer card with this option checked cannot be opened from the list.

5.5 Exporting customer selection

The first field in the hitlist of customers is an on / off checkbox. Default is this checkbox set to ON after each new selection, this means that all customers are selected for further action. Use the **[All (de) select]** to customers (de-) selection. Use the space bar to (de) selected pre record.

Only customers with the checkbox ON will be included in subsequent actions, such as exporting to Excel or any other form of export.

Click the box next to the button **[Overview]**, or right mouseclick choose option **Overview**.



The various output forms are shown.

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For the preparation of labels, envelopes or letters in Word there should templates be present in the correct folder. Depending on the configuration, this will be the same folder as where the Ski System application is stored, or the directory as set in File Locations templates / templates in MS Word.

The records selected by the system first are exported to a .txt file and placed in the subdirectory \ Mailing. The .txt file is merged with the appropriate template (. Dot file) attached.

Standard templates

SkiKlantEnvelopMerge.dot

SkiKlantEtiketMerge.dot

SkiKlantLijstMerge.dot

SKIKlantBrief.dot

SKIKlanten.dot

Standard export files:

SKIKlantEtiket.txt

SKIKlantLijst.txt

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6 INVOICES

6.1 Invoice understand / mutate

Open screen **Invoices** to create new invoices or view/modify payment information by customer.

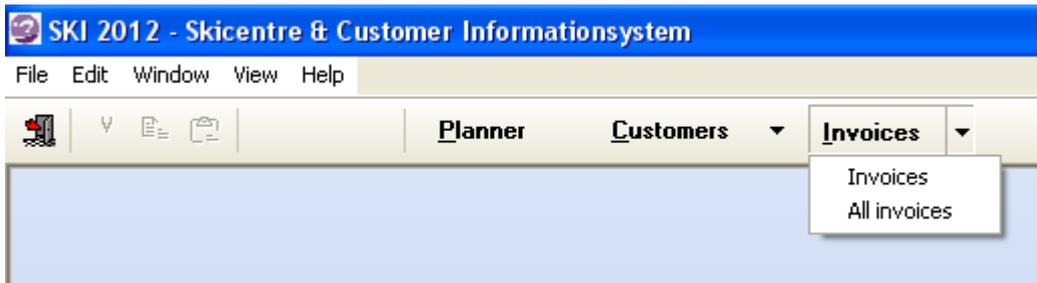


Fig. 6a

First, select a customer through the selection window behind Customer field [...], screen **Customers** opens. Type in (a part of) the name of the customer in field **Search for** or change **Search in field** for searching on another search field. Double-click on the right customer, the screen **Invoices booked lessons** is displayed.

Click on an invoice in the list, for example to add the amount paid by the customer. Invoices non-paid or partially paid are shown in **red**.

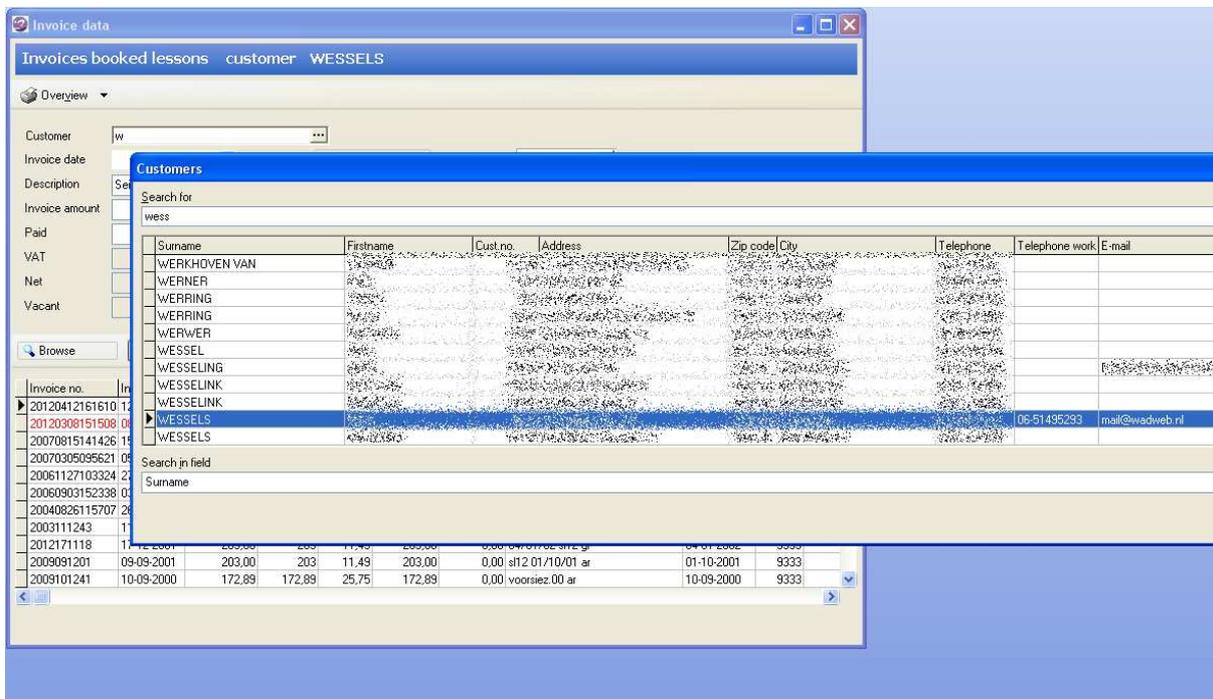


Fig. 6b

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6.2 Create new invoice

Select first a customer and then press **[Add]** in screen **Invoices booked lessons customer <NAME>**.

Invoice data

Invoices booked lessons customer WESSELS

Overview

Customer: WESSELS

Invoice date: [dropdown] InvoiceNo: 20120412161610 Book: [dropdown]

Description: Season ticket (24 lessons) Type: SEIZ

Invoice amount: 425,00 Date 1st lesson: [dropdown]

Paid: 425,00 Date paid: [dropdown]

VAT: 24,06 VAT %: 6

Net: 400,94 Discount %: [input]

Vacant: 0,00

[Browse] [Delete] [Change] [Add] [OK] [Cancel] [Close] [All] [Vacant] [Paid]

Invoice no.	Invoice date	Amount	Paid	VAT	Net	Outstanding	Description	Date paid	Cust.no.	Ledger
▶ 20120412161610	12-04-2012	425,00	425	24,06	400,94	0,00	Season ticket (24 lessons)	12-04-2012	9333	
▶ 20120308151508	08-03-2012	425,00	200	0,00	425,00	225,00	test	08-03-2012	9333	
20070815141426	15-08-2007	425,00	425	24,06	400,94	0,00	seiz 07-08 JZ	08-09-2011	9333	
20070305095621	05-03-2007	149,00	149	8,43	140,57	0,00	combicursus 2007 Ph	26-03-2007	9333	
20061127103324	27-11-2006	169,00	169	0,00	169,00	0,00	sl8 11-12-2006 Ph	11-12-2006	9333	
20060903152338	03-09-2006	169,00	169	0,00	169,00	0,00	sl 8 11-9-06 nn	18-09-2006	9333	
20040826115707	26-08-2004	193,50	193,5	12,17	182,55	0,00	sl12 06-0-04 bj	01-11-2004	9333	
2003111243	11-03-2002	175,00	175	9,91	175,00	0,00	zomercursus 2002 ar	23-04-2002	9333	
2012171118	17-12-2001	203,00	203	11,49	203,00	0,00	04/01/02 sl12 gl	04-01-2002	9333	
2009091201	09-09-2001	203,00	203	11,49	203,00	0,00	sl12 01/10/01 ar	01-10-2001	9333	
2009101241	10-09-2000	172,89	172,89	25,75	172,89	0,00	voorsiez.00 ar	10-09-2000	9333	

Fig.6c

Screen **Invoice Type** opens, choose the type of invoice. If an amount and / or description is linked to the type of bill (see File → Basic data → Types Invoice) then price / description is automatically filled. The values can be adjusted.

Invoice types/groups

Search for: [input]

Code	Description	Rate
LL		24
KIND		
PL		17,5
▶ SEIZ	Season ticket (24 lessons)	425
SL12		240
SL20		
SL8		176
TOER		
ZOMER		

Search in field: [dropdown]

[OK] [Cancel]

Fig. 6d

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If the invoice is paid directly when creating the invoice, enter the amount in **Paid**, select the percentage tax and press **[OK]**.



After creating the invoice, an overview of lessons / invoice can be generated by clicking on button **[Overview]**. Options: view Lesson Card on screen, send the card to the printer or send it by e-mail to the customer.

Fig. 6e

Lesson card formatting

The options **Lesson card to printer** and **Lesson card preview** are presented in the standard layout. The invoice / course card however can be configured to your preferences and formatting. To do so, adjust the template SKI_LESKAART.RTF. This file is found in the folder where the Ski System is installed. See appendix A "Templates" for more information.

Formatting course card e-mail

For sending the lesson card by e-mail a customizable template is also available. This is an HTML template, found in the subdirectory \ HTML \ SKI_Leskaart.html. See Appendix A "Templates" for more information.

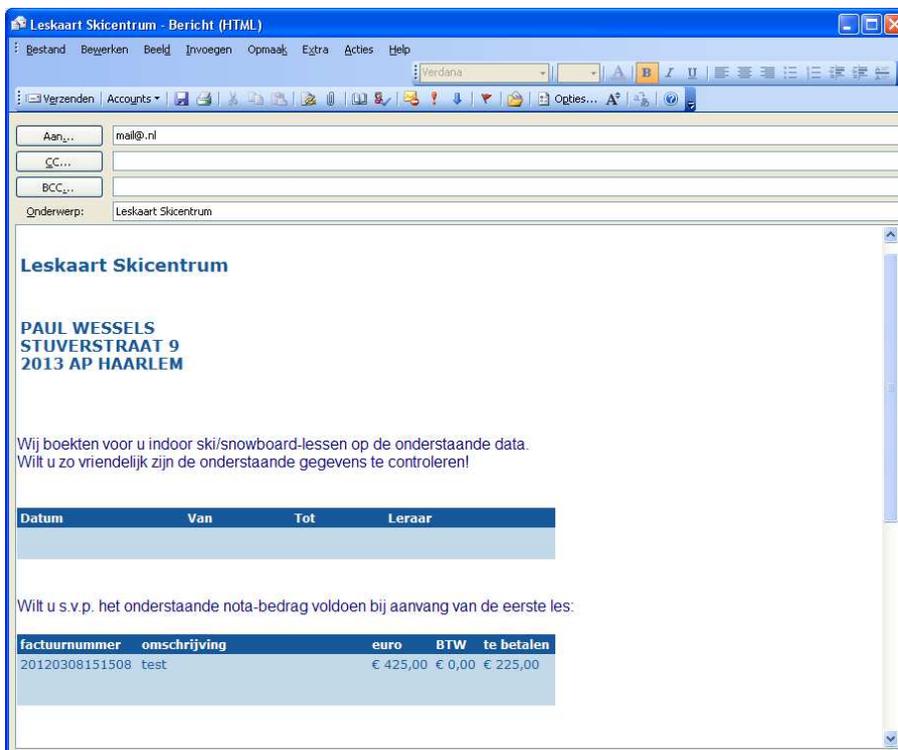


Fig.6g

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6.3 Invoice reports

The module **All invoices** provides overview on the status of your invoices, per customer or per period and also in lessons / customers without invoices. Choose **All invoices**, the screen **Invoices paid/not paid** opens.

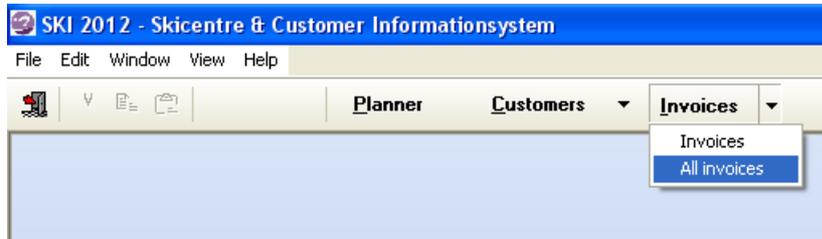


Fig. 6h

Search by Customer

Click the radiobutton **Customer on**. Enter a date in field **Date Lesson** or select a date from the underlying calendar. Choose whether to let the system search for invoices Paid or Vacant (not or partly paid). If you want to search for unbilled customers (with booked lessons) click options **Vacant** and **Not billed**. Press button **[Search]** to carry out the selection.

Search by Period

Click the radiobutton **Period** on. Enter a From date and till date. The system will search for paid or unpaid invoices within the specified period.

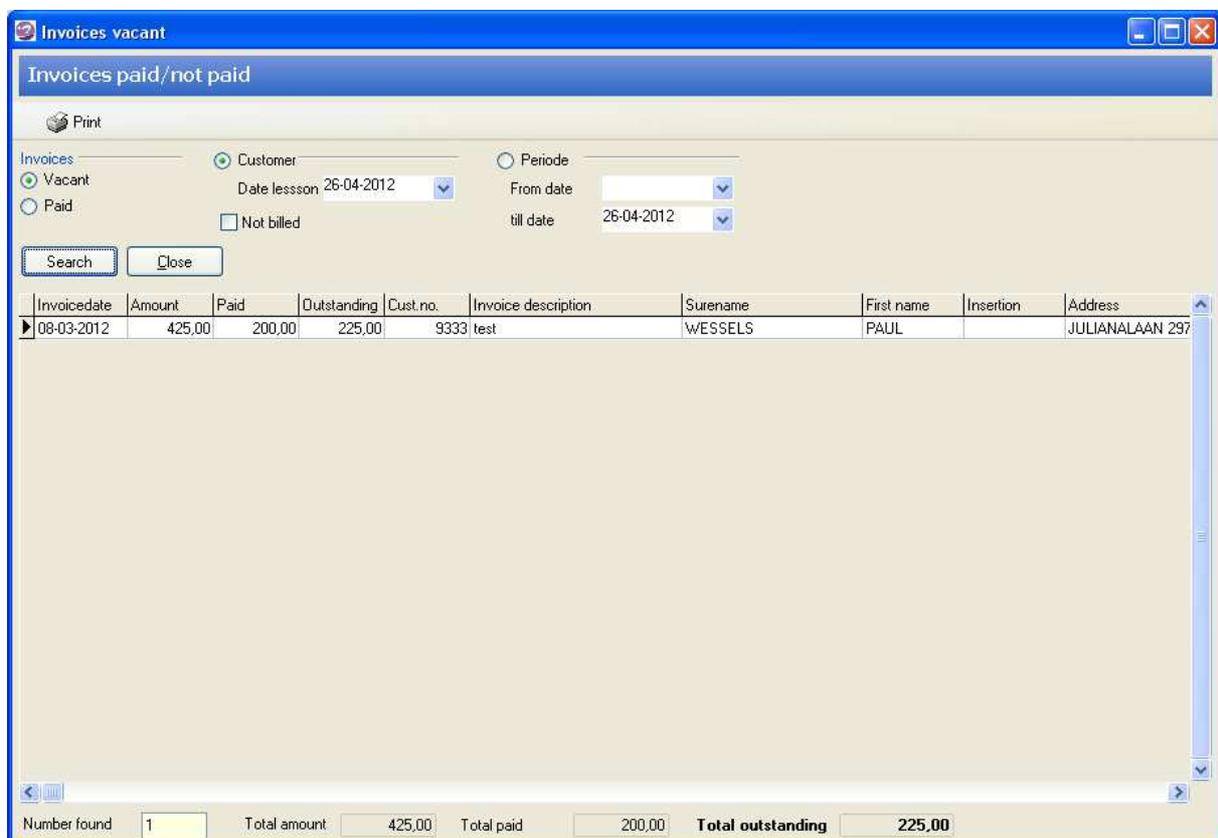
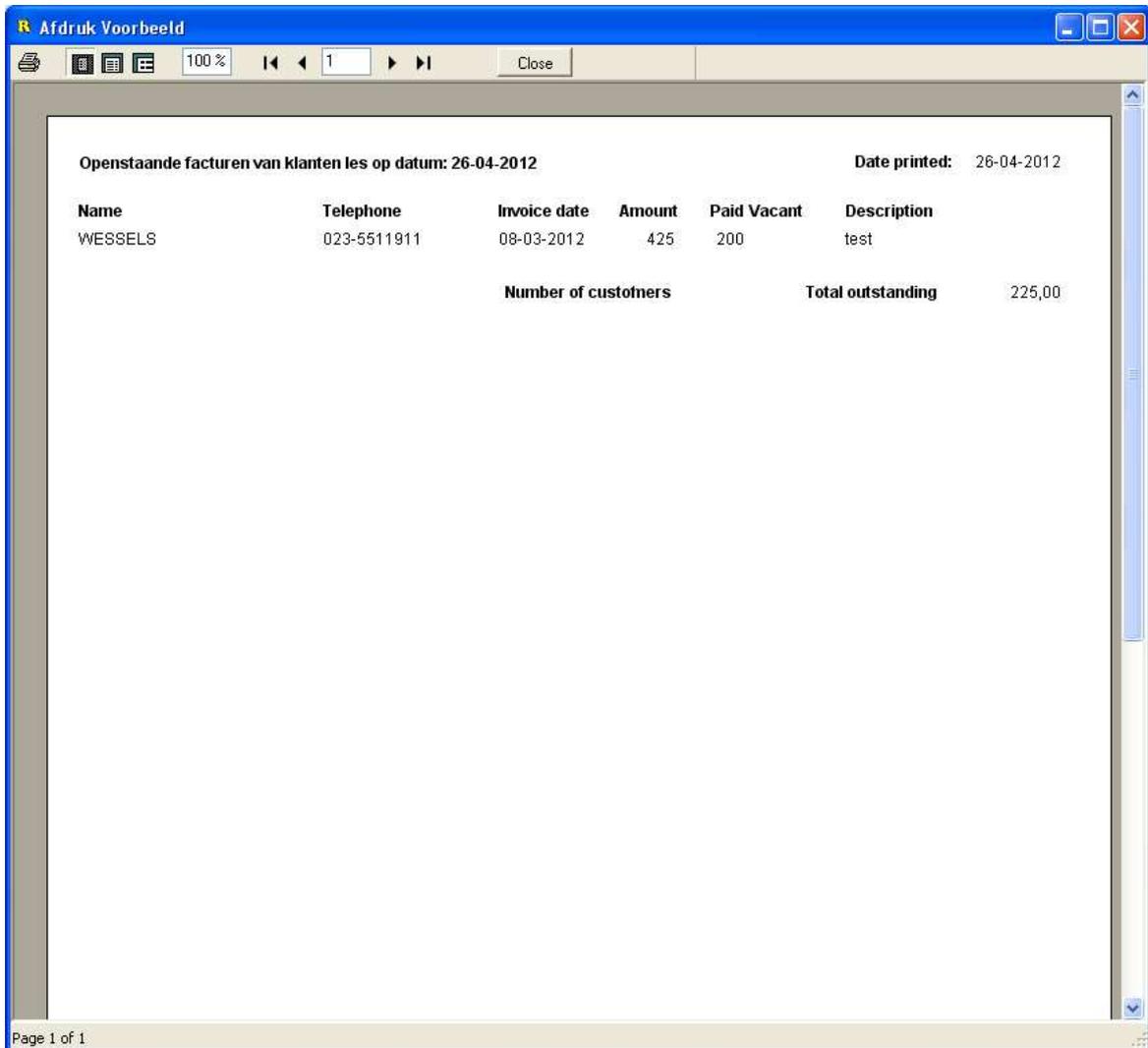


Fig. 6i

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Use the button **[Print]** to print the result of the query for further actions.



The screenshot shows a window titled "Afdruk Voorbeeld" with a toolbar at the top containing icons for print, zoom, and navigation, along with a "Close" button. The main content area displays a report titled "Openstaande facturen van klanten les op datum: 26-04-2012" with a "Date printed: 26-04-2012". The report contains a table with the following data:

Name	Telephone	Invoice date	Amount	Paid Vacant	Description
WESSELS	023-5511911	08-03-2012	425	200	test

Below the table, there are two summary items:

Number of customers	Total outstanding	225,00
----------------------------	--------------------------	--------

The status bar at the bottom left of the window indicates "Page 1 of 1".

Fig. 6y

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7 MODULE TEACHERS

With the module **Teachers**, the deployment of teachers can be registered and for each scheduled lesson a teacher can be assigned. For using the module go to File → General Settings → tab General. Click the button **YES Teacher module active**.

To add new and mutating existing teachers choose **File → Teachers**. See **Chapter 5 Customers** for a description how to add/modify teachers, the module **Teachers** and **Customers** work identical. Not all tabs and options are identical: only the Lessons tab is visible (see what lessons are given by this teacher).



do 26-04-2012		
	Track1	Track2
9 ⁰⁰		
9 ³⁰		
10 ⁰⁰	1 S1 Jong WESSELS	
11 ⁰⁰	1 1 0	

In case the module Teachers is active, a teacher can be added to each lesson. In the Planning screen, the teacher's name is in bold above the on this lesson booked customers.

Use the module **Year Planning** to schedule teachers on fixed hours / days throughout the season. See **chapter 11 Year Planning** for further details.

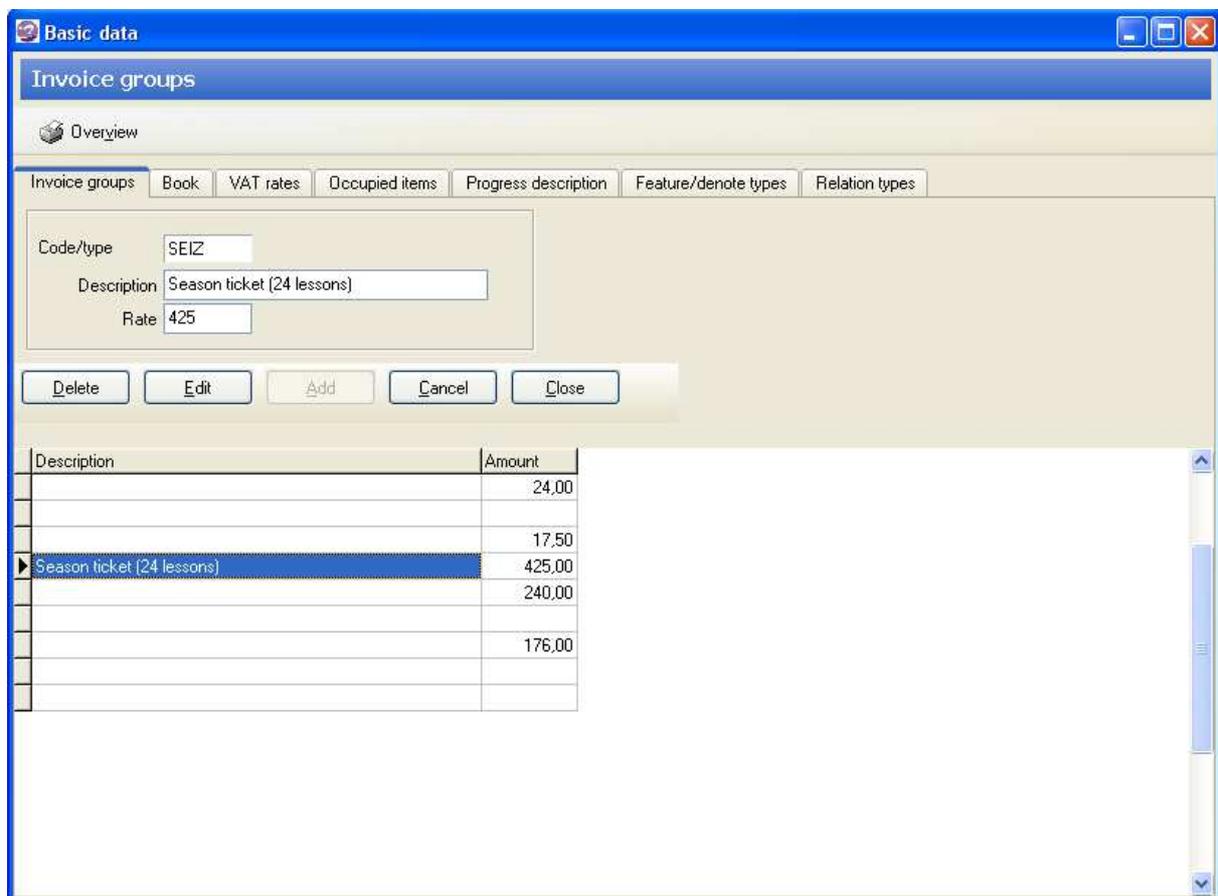
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8 BASIC DATA

Go to **File --> Basic data** for managing the various lists. The module contains the following tabs: Invoice types, Book, VAT rates, Occupied items (reason closed / action), Progress descriptions, Feature/denote types, Relation types.

The process is on each tab generic: search for an existing item by entering the code. If the item is found, the corresponding data is displayed. The [Edit], [Delete] and [Cancel] buttons become active. Mutate the data and confirm the mutation using the [Edit] button. If the code is not found then the [Edit] and [Delete] button become inactive and the [Add] button is activated.



Tab Invoice types

Enter a unique code, a description and price. The invoice type actually corresponds to the product, per invoice type only one product is attached (single lesson, reduced price for volumes, special offers etc).

When creating the invoice, both the definition and the amount per invoice can be adjusted, the list **Invoice types** is therefore not leading but meant as quick invoice creator.

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Tab Book

???

Book

Overview

Invoice groups | **Book** | VAT rates | Occupied items | Progress description | Feature/denote types | Relation types

Code:
Description:

Accountno.	Description
▶	Turnover - lessons

Tab Tax rates

Enter all possible VAT rates.

VAT rates

Overview

Invoice groups | Book | **VAT rates** | Occupied items | Progress description | Feature/denote types | Relation types

Code:
VAT %:
Description:

Code	Description	PERC
▶	Vat	20

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Tab Occupied items

Color settings for lesson planning and annual planning. The code is automatically assigned, enter only the description and color.

Occupied items

Overview

Invoice groups | Book | VAT rates | **Occupied items** | Progress description | Feature/denote types | Relation types

Code: 1
Description: Event
View colour: Purple

Delete | Edit | Add | Cancel | Close

ID	Description	Colour
1	Event	clPurple
2	Combi-lesson	clYellow
6	No teacher	clScrollBar
8	stage	clTeal
12	Snowboard lesson	clGreen
14	AMA skiteam	clYellow
15	Diploma skiing	clFuchsia
16	Travels	clBlue
17	kids hour	clInactive

Tab Progress description

In addition to the default level indicator L, A and S, enter your customized set of levels indicating the experience of the customer.

Progress description

Overview

Invoice groups | Book | VAT rates | Occupied items | **Progress description** | Feature/denote types | Relation types

Code: A
Description: Novice: first time

Delete | Edit | Add | Cancel | Close

Code	Description	ID
A	Novice: first time	1
B	Expierence: 3 years in snow	2
B2	Expierence: 2 years on indoor slope	3

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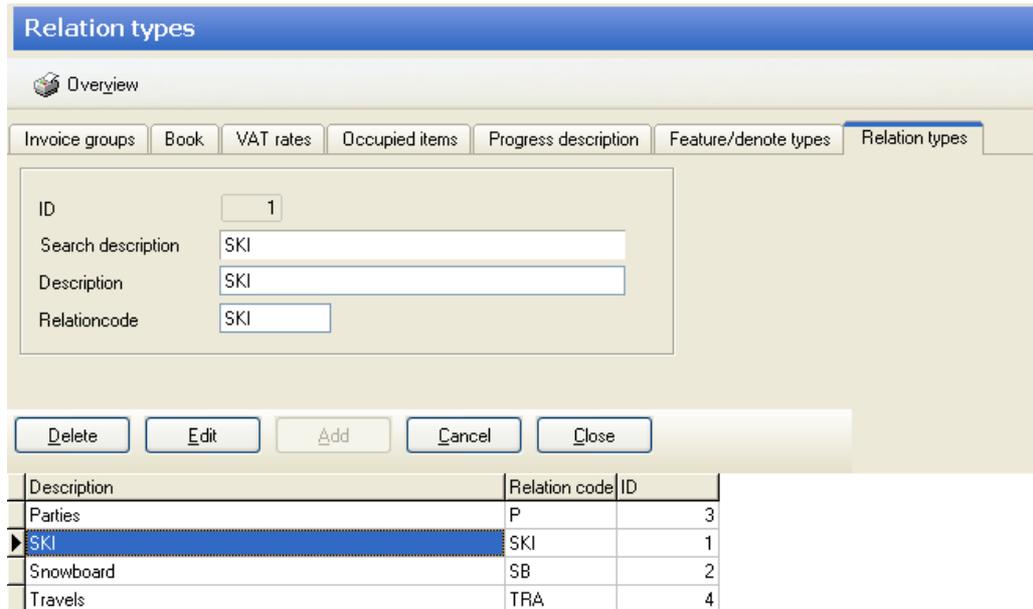
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Tab Feature descriptions

Use the list of additional features to specify groups of customers. Usefull for management information, mailings. Example: how many customers have found our ski center through our ad in the paper ?

Tab Relationtypes

Use this list for defining more kinds of relations / groups.



The screenshot displays the 'Relation types' tab in a software application. At the top, there is a blue header bar with the text 'Relation types'. Below this is a navigation bar with several tabs: 'Invoice groups', 'Book', 'VAT rates', 'Occupied items', 'Progress description', 'Feature/denote types', and 'Relation types' (which is currently selected). Below the navigation bar is a form for editing a relation type. The form contains four input fields: 'ID' with the value '1', 'Search description' with the value 'SKI', 'Description' with the value 'SKI', and 'Relationcode' with the value 'SKI'. Below the form are five buttons: 'Delete', 'Edit', 'Add', 'Cancel', and 'Close'. At the bottom of the screenshot is a table with the following data:

Description	Relation code	ID
Parties	P	3
SKI	SKI	1
Snowboard	SB	2
Travels	TRA	4

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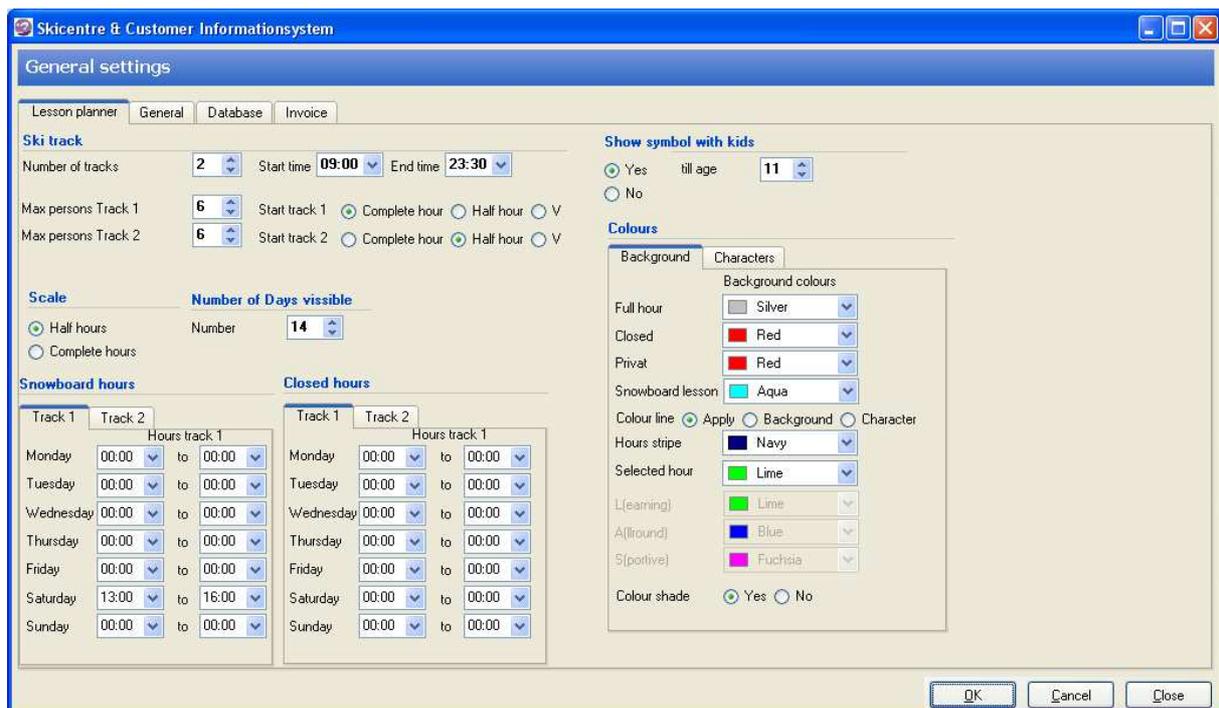
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9 GENERAL SETTINGS

Go to **File** → **General settings** in order to set user preferences and settings.

9.1 Tab lesson planner

- Number of tracks
- number of persons per track (maximum number of bookings per hour), start time of a track on the whole or half hour or variable.
- scale whole / half hour (use half hour if lessons start on half hours)
- preference for the number of days visible in the planning screen (7 or 14 preferred!).
- in lesson planning show children booked on this hour, if you want this to be shown -> enter Yes + age.
- Add unique colors to each type of lesson (full, closed, private and snowboard hours)
- fade the colors to make them a little less "hard"



9.2 Tab General

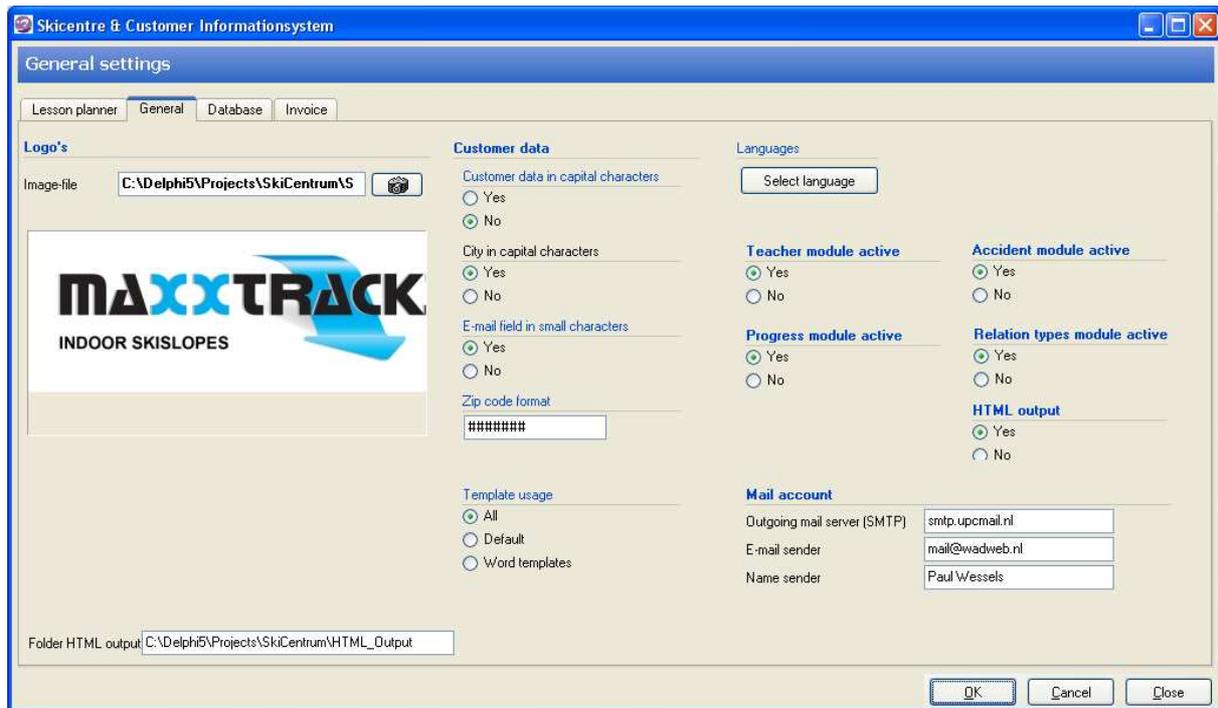
In tab **General** various modules and features can be adjusted, switched on or off.

- customer name, address and / or email presentation in uppercase
- language setting
- switch on/off the modules Progress, Accident, Relation
- switch on/off teacher module
- html output yes / no for output (overview lessons/track/day) on a screen along the track. If **Yes** then adding the location where to store the html-documents is mandatory.

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- Lessons of the customer in the customer screen filter for current season (note: enter each new season again)
- Use customized templates yes/no. Option **All** will give the user access to default templates and customized (Word) templates.
- Mail account settings for mails in large volums using STMP - ask your system administrator or see Appendix B.



9.3 Tab Database

In this tab make your settings for backup and restore. Enter the location on disk and preferences for making backup and restore files.

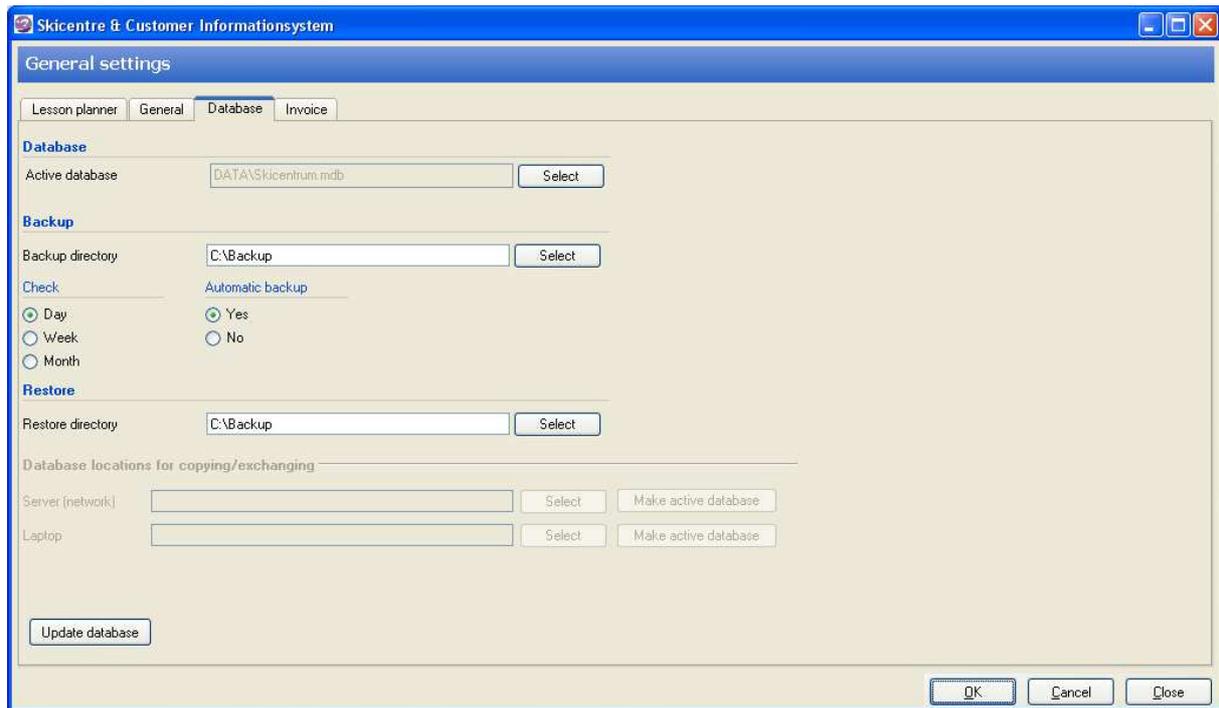
In order to make the system check during startup whether a backup has been made recently, go to option **Check**. Choose the frequency of monitoring: daily, weekly or once a month.

Note:

the actual production of a backup is either done **automatically** (choose YES at option **Automatic backup**) or is to be started **manually**. To start a backup go to File → File management → Create Backup. To restore a database, go to File → File Management → Restore database.

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Note: button **[Update Database]** only use when required by Wessels Application Development (installation a new version of SKI).

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9.4 Tab Invoice

When using the **default** format/layout for the invoice / lesson card, then the header and footer can be set to your preference and a logo can be added. Select a logo from disk and specify the position where the logo should appear.

Enter a header and footer and click button **[OK]**.

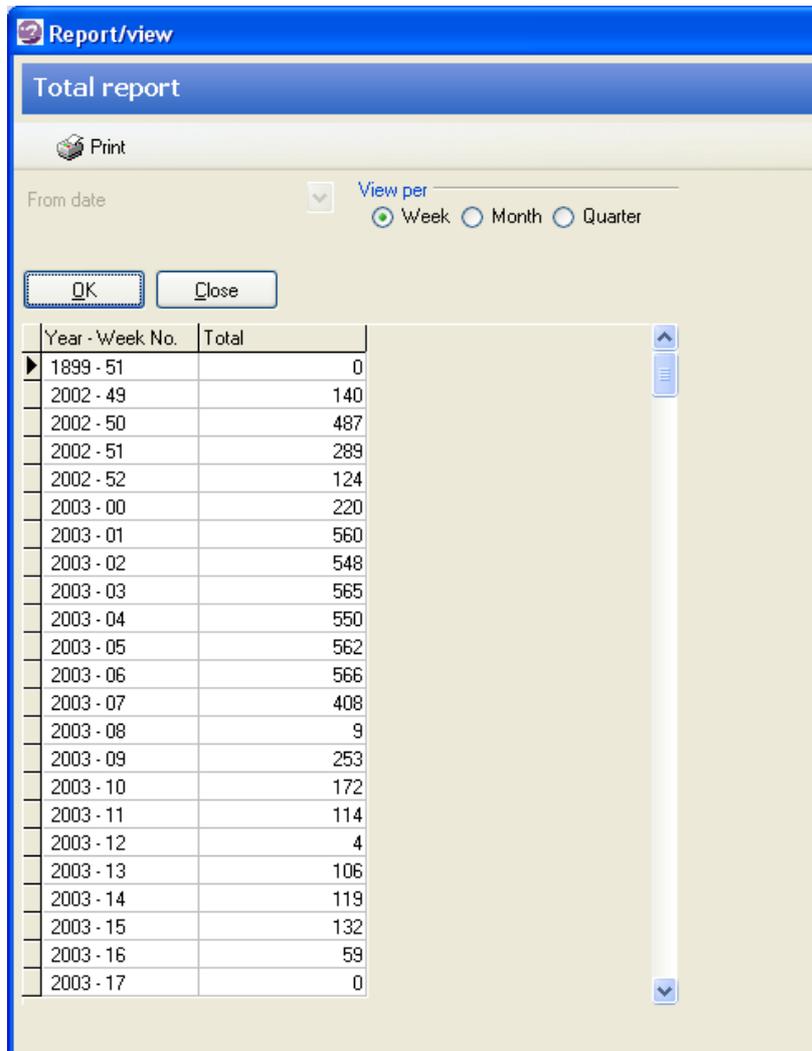


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10 REPORTS

Go to **File --> Report/view** for generating a report on the total number of lessons from a certain date - per week, per month or per quarter of a year.



The screenshot shows a software window titled "Report/view" with a "Total report" header. Below the header is a "Print" button. The "View per" section has radio buttons for "Week" (selected), "Month", and "Quarter". There are "OK" and "Close" buttons. A table displays the following data:

Year - Week No.	Total
1899 - 51	0
2002 - 49	140
2002 - 50	487
2002 - 51	289
2002 - 52	124
2003 - 00	220
2003 - 01	560
2003 - 02	548
2003 - 03	565
2003 - 04	550
2003 - 05	562
2003 - 06	566
2003 - 07	408
2003 - 08	9
2003 - 09	253
2003 - 10	172
2003 - 11	114
2003 - 12	4
2003 - 13	106
2003 - 14	119
2003 - 15	132
2003 - 16	59
2003 - 17	0

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11 YEAR PLANNING

The module **Year planning** allows you to define the availability of the tracks. Go to File --> **Year planning**.

This module gives you the opportunity to mark or block (close) dates/hours/tracks in batch, for example tracks that will be closed for maintenance or pre-reserved for special events. The module can also be used to add teachers to specific hours/days/periods.

NB. The calendar on the right of the screen is meant for looking up dates. No functionality behind this calendar!

Year planning

Agenda planning - special events/closed/teachers

Print

Reason: [dropdown] ... Event Closed

Start date: [dropdown] Track 1 Track 2

End date: [dropdown]

Start time: [dropdown] Complete day Monday Tuesday Wednesday Thursday Friday Saturday Sunday

End time: [dropdown] Skilesson Snowboard lesson

Teacher: [dropdown] ...

Open hours Close hours Cancel Close

Number of book lessons: [input] 0%

Aug 2011

	zo	ma	di	wo	do	vr	za
31		1	2	3	4	5	6
32	7	8	9	10	11	12	13
33	14	15	16	17	18	19	20
34	21	22	23	24	25	26	27
35	28	29	30	31			
36							

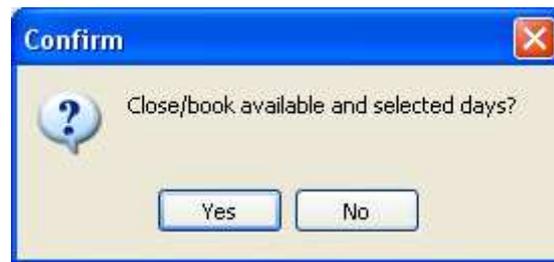
Sep 2011

	zo	ma	di	wo	do	vr	za
35				1	2	3	
36	4	5	6	7	8	9	10
37	11	12	13	14	15	16	17
38	18	19	20	21	22	23	24
39	25	26	27	28	29	30	
40							

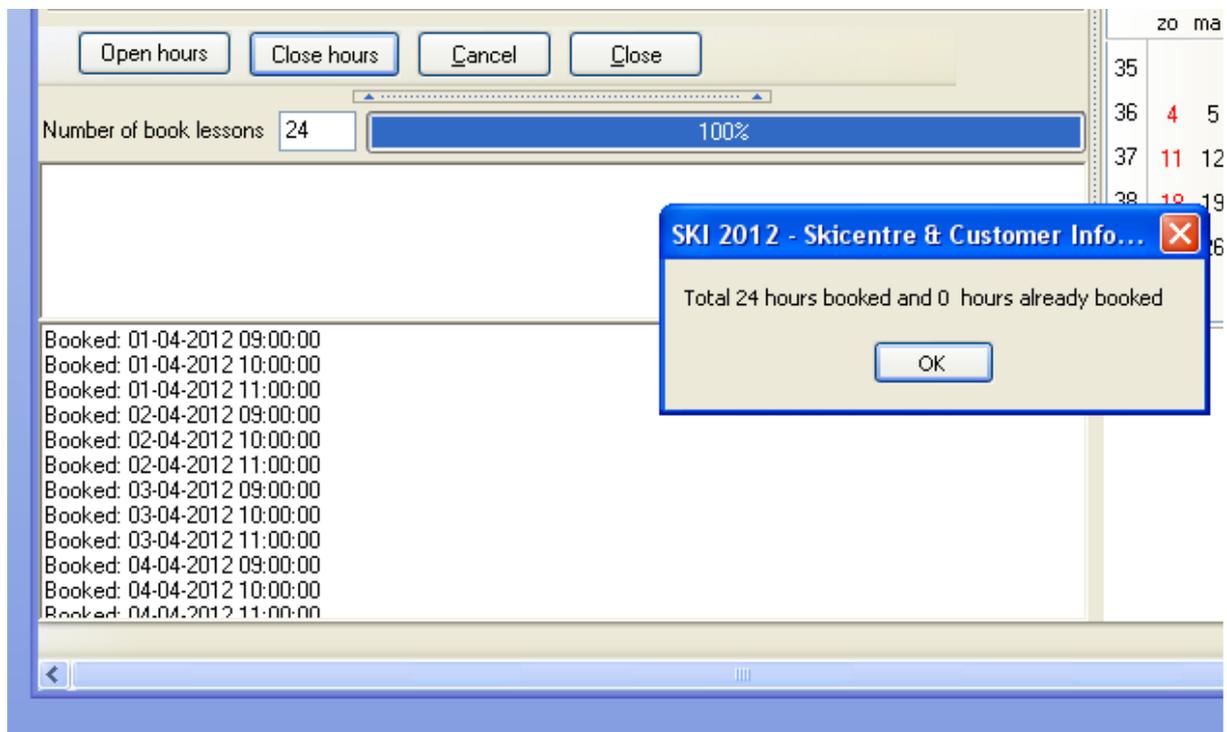
Enter your criteria and press button **[Close hours]**. The following message prompts:

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After choosing **Yes**, the status bar will run, the hours that meet the criteria will be closed/marked and subsequently displayed on the screen. A message about the number of hours that have been concluded and if applicable, also the number of hours that already has scheduled customers (hours booked).



To reverse your action: enter the same criteria and press button **[Open hours]**.

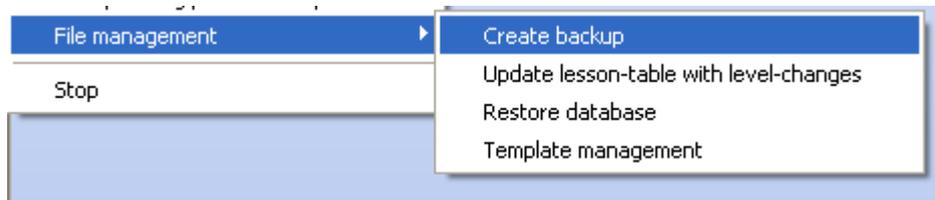
Hours on which customers are scheduled ('hours already booked') are not included in this batch action. Go to the **Lesson Planner** to close or mark these hours manually.

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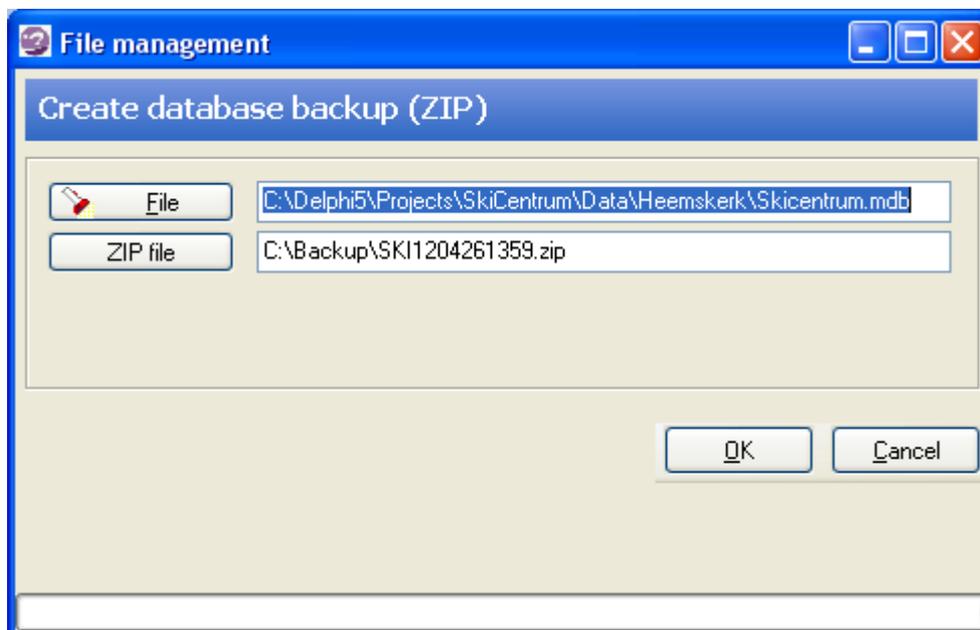
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12 FILE MANAGEMENT

Go to **File --> File Management**. The following options are offered from this menu:

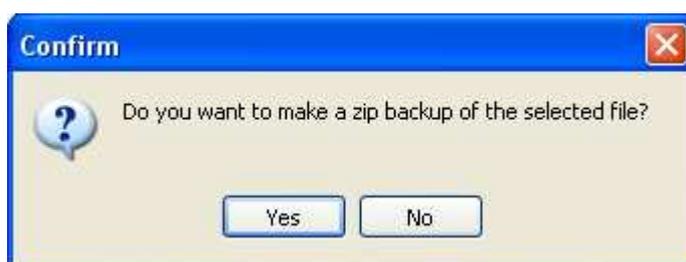


12.1 Create backup



With button **[File]** the right database can be searched on the computer / server. The name and location of the database that will be the subject of the backup process is shown in the field next to the **[File]** button.

Use button **[ZIP file]** to search for the correct folder and filename to store/overwrite the backupfile. Click button **[OK]** to start the backup process.

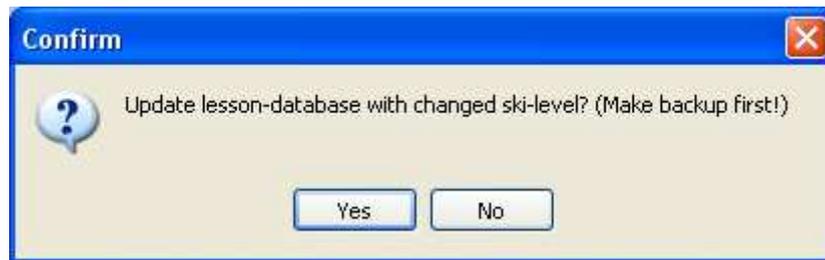


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12.2 Update lessons table

Select option **Update lessons table – level changes** to reset the "number of customers per level", shown in the lessons planner. The lesson planner indicates per lesson what kind of bookings are made, to make sure that experienced and starters are not mixed in one lesson on the same track. It may occur that, due to changes made throughout the year in levels of experience in customer data, the numbers per level shown are not accurate.

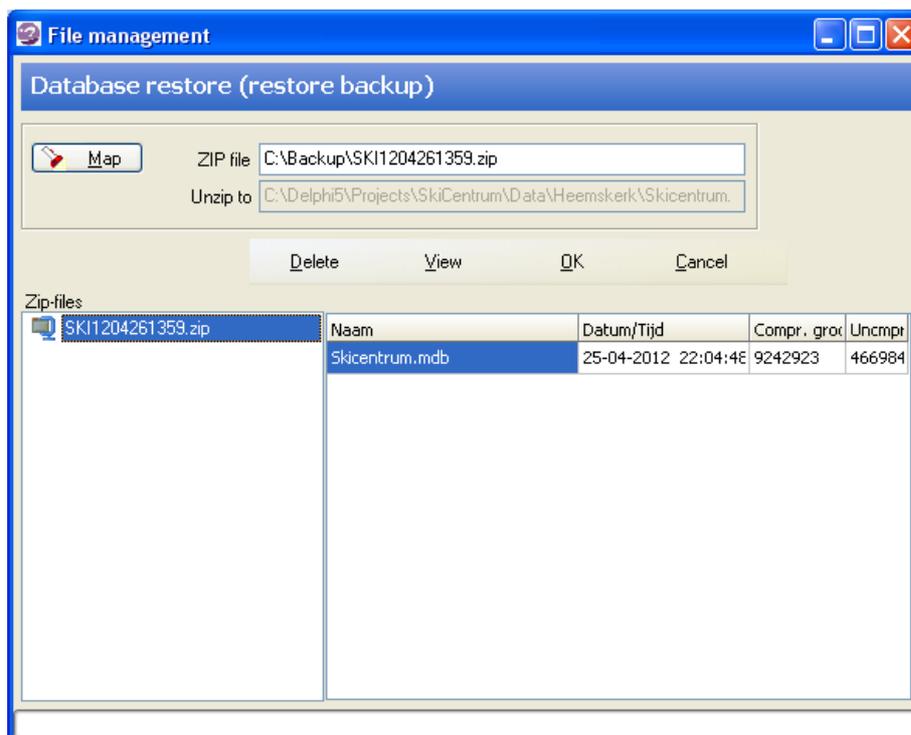


12.3 Restore database

To restore a database, select the folder where the backup zip files are located.

On the left the files found in the folder are displayed. Double-click a file and right displays the contents of the zip file. Note: the content should be **Skicentrum.mdb**. Check the date and time.

Note: First make a copy on disk with copy / paste of the current database!

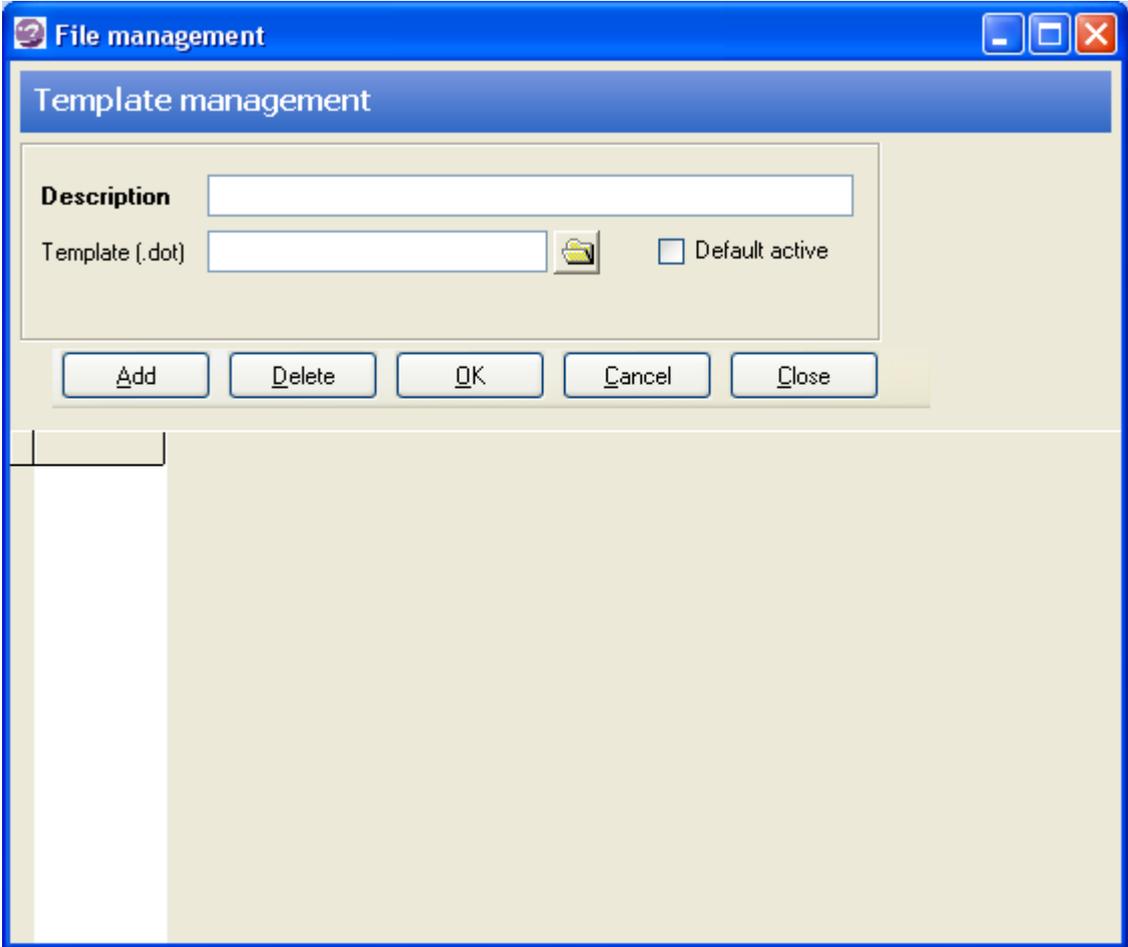


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12.4 Template Management

Module inactive, see Appendix A.



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APPENDIX A TEMPLATES

Template Customer Card

Filename: SKI_LESKAART.RTF
Application: Generating invoice / Lesson Card per customer
Run through: customer screen

Use `\a:field name\` for customer fields, `\b:Lesdatumbegin\` for lesson fields.

Example:

LES AGREEMENTS

Dear \ a: NAME \,

We booked for you indoor ski / snowboard lessons (conditions overleaf) on the below dates:

Dates	from	to	
\ scan (b) \			
\fdtm (b: Lesdatumbegin, "dddd, mmmm d") \	\fdtm (b: LesdatumBegin, "hh: mm) \	\fdtm (b: LesdatumEind, "hh: mm) \	
\ endscan, ctn (b: ID, Telaantal) \			

Total we have \ Telaantal \ classes \ if (telaantal > 1) \ 's' \ \ endif \ booked.

\ if (c : outstanding <> 0) \ \ "We kindly ask you *before the first lesson* the following amount. You can pay cash at our counter or pins. "\

Factuurnr.	Description	amount	paid	VAT	payable

Stay informed about our activities please visit www.skicentrum.nl

Thank you for your booking and wishing you much joy during and after classes at our ski center.

Sincerely,

Skicentrum

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Template Overview lessons day

Filename: SKI_DAGOVERZICHT.RTF
Application: daily scheduled lessons per track
Run through: lesson planner/new invoice

Example:

lesson planning job \ a: Baan \ in	\fdtm (a: Lesdatumbegin, "dddd, mmmm d") \

\scan (a) \

\ Endif \ \ if (a: RECID_1 > 0) \ \ a: KL1Naam \	\ a: KLLft1 \	\ a: KL1LesDone \	\ a: KL1LesToDo \	\ frtf (a: KL1Opmerk) \
2 \ endif \ \ if (a: RECID_2 > 0) \ \ a: KL2Naam \	\ a: KLLft2 \	\ a: KL2LesDone \	\ a: KL2LesToDo \	\ frtf (a: KL2Opmerk) \
3 \ endif \ \ if (a: RECID_3 > 0) \ \ a: KL3Naam \	\ a: KLLft3 \	\ a: KL3LesDone \	\ a: KL3LesToDo \	\ frtf (a: Notable KL3) \
4 \ endif \ \ if (a: RECID_4 > 0) \ \ a: KL4Naam \	\ a: KLLft4 \	\ a: KL4LesDone \	\ a: KL4LesToDo \	\ frtf (a: Notable KL4) \
5 \ endif \ \ if (a: RECID_5 > 0) \ \ a: KL5Naam \	\ a: KLLft5 \	\ a: KL5LesDone \	\ a : KL5LesToDo \	\ frtf (a: Notable KL5) \
6 \ endif \ \ if (a: RECID_6 > 0) \ \ a: KL6Naam \	\ a: KLLft6 \	\ a: KL6LesDone \	\ a: KL6LesToDo \	\ frtf (a : Notable KL6) \

\endif \ \ endscan (a) \

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Template Customer card – html

Filename: SKI_LESKAART.HTML
Application: Invoice /Lesson Card per customer – html (e-mailing)
Run through: customer screen

With some knowledge of html templates changes can be made in this template. Otherwise contact with Wessels Application Development for support.

The following fields can be used as variables:

[CUSTOMER NAME], [CUSTOMER NAME], [KLANTTUSSENV], [CUSTOMER ADDRESS], [KLANTPC],
[CUSTOMER LOCATION]
[KLANTTELPRIVE], [CUSTOMER counter], [CUSTOMER MOBILE] [CUSTOMER MAIL] [TEACHER]
[FACTXT], [FACTXTNR] [FACTXTOMS] [FACTXTBEDRAG] [FACTXTBTW] [FACTXTOPEN],
[FACTXTBETAALD] [FACNR], [FACOMS], [FACBEDRAG], [FACBTW], [FACOPEN], [FACBETAALD],
[LESDATUM], [LESVAN], [LESTOT] [BILLING START] [BILLING END]

Example:

The screenshot shows a web browser window with the title 'Leskaart Skischool'. The page content includes several variable placeholders in blue text: [KLANTVOORNAAM] [KLANTNAAM], [KLANTADRES], [KLANTPC] [KLANTPLAATS]. Below this is a paragraph: 'Wij boeken voor u indoor ski/snowboard-lessen op de onderstaande data. Wilt u zo vriendelijk zijn de onderstaande gegevens te controleren!'. This is followed by a table with four columns: 'Datum', 'Van', 'Tot', and 'Leraar'. The table rows contain placeholders: [LESDATUM], [LESVAN], [LESTOT], [LERAAR]. Below the table are more placeholders: [FACTUURBEGIN], [FACTXT], [FACTXTNR] [FACTXTOMS] [FACTXTBEDRAG] [FACTXTBTW] [FACTXTOPEN], [FACNR] [FACOMS] [FACBEDRAG] [FACBTW] [FACOPEN], and [FACTUUREIND]. At the bottom, there is a light blue box containing contact information: 'Skischool | Adres | Postcode Plaats', 'tel: 023-55 11 9 11 | www.wadweb.nl | mail@wadweb.nl', and 'Indoor ski- & snowboardlessen | Rodelbaan | Skishop', 'Ski & Snowboard onderhoud | Après ski bar | Feesten & Partijen | Reizen'. The browser's status bar at the bottom shows 'Gereed'.

APPENDIX B E-MAIL MODULE

Introduction

The e-mail module is used to send multiple clients simultaneously an e-mail.

The module can be used to send general messages to the customer or for example, distributing an electronic newsletter.

You can choose to send emails via Outlook or via SMTP. Using Outlook, have a limited number of customers in the bcc or cc. Using SMTP, there is no limit (although recommended is to not send out thousands of emails at once).

Setting SMTP details in General Settings

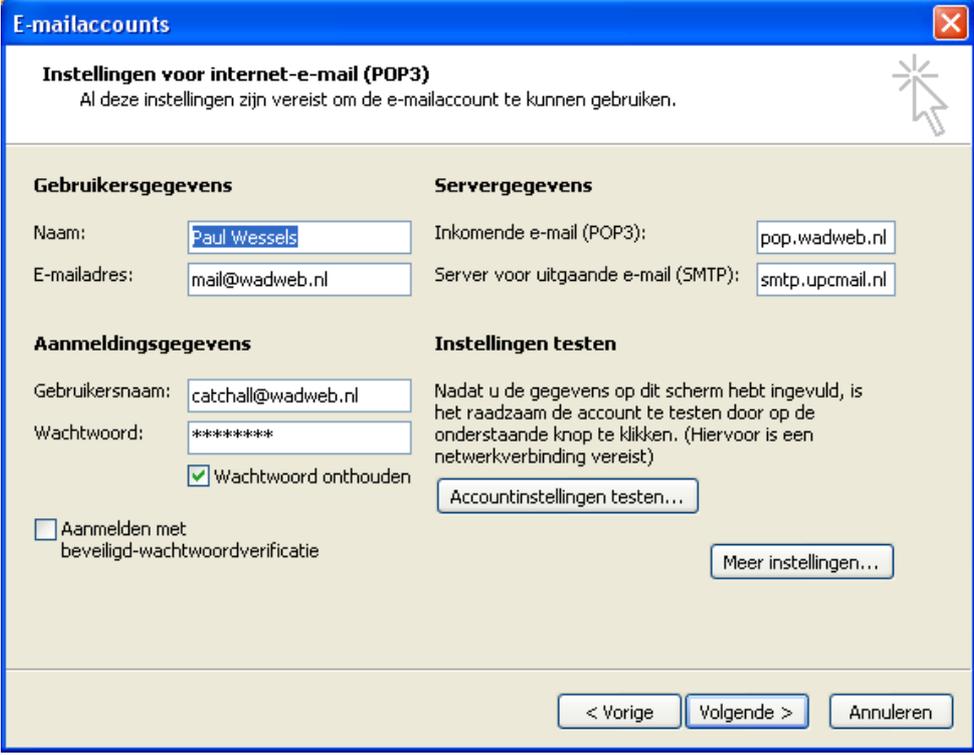
For sending the e-mails via Outlook there are no additional settings required.

If selected for transmission via SMTP, first find out what SMTP server you are using. This information can be found in the account settings of **MS Outlook**.

Go to **Extra options --> Account Settings**

Double-click the e-mail account that will be used to send the e-mails. Note the **Username** and the value entered under "**Outgoing Server (SMTP)**".

(NB Make notes on full **login information**, "Username" and "Password", in some cases you also need this information to be able to use SMTP)



The screenshot shows a window titled "E-mailaccounts" with a close button in the top right corner. The main title is "Instellingen voor internet-e-mail (POP3)" and a note below it says "Al deze instellingen zijn vereist om de e-mailaccount te kunnen gebruiken." There is a mouse cursor pointing to a star icon in the top right.

Gebruikersgegevens		Servergegevens	
Naam:	<input type="text" value="Paul Wessels"/>	Inkomende e-mail (POP3):	<input type="text" value="pop.wadweb.nl"/>
E-mailadres:	<input type="text" value="mail@wadweb.nl"/>	Server voor uitgaande e-mail (SMTP):	<input type="text" value="smtp.upcmail.nl"/>

Aanmeldingsgegevens		Instellingen testen	
Gebruikersnaam:	<input type="text" value="catchall@wadweb.nl"/>	Nadat u de gegevens op dit scherm hebt ingevuld, is het raadzaam de account te testen door op de onderstaande knop te klikken. (Hiervoor is een netwerkverbinding vereist)	
Wachtwoord:	<input type="password" value="*****"/>		
<input checked="" type="checkbox"/> Wachtwoord onthouden		<input type="button" value="Accountinstellingen testen..."/>	
<input type="checkbox"/> Aanmelden met beveiligd-wachtwoordverificatie		<input type="button" value="Meer instellingen..."/>	

At the bottom of the window are three buttons: "< Vorige", "Volgende >", and "Annuleren".

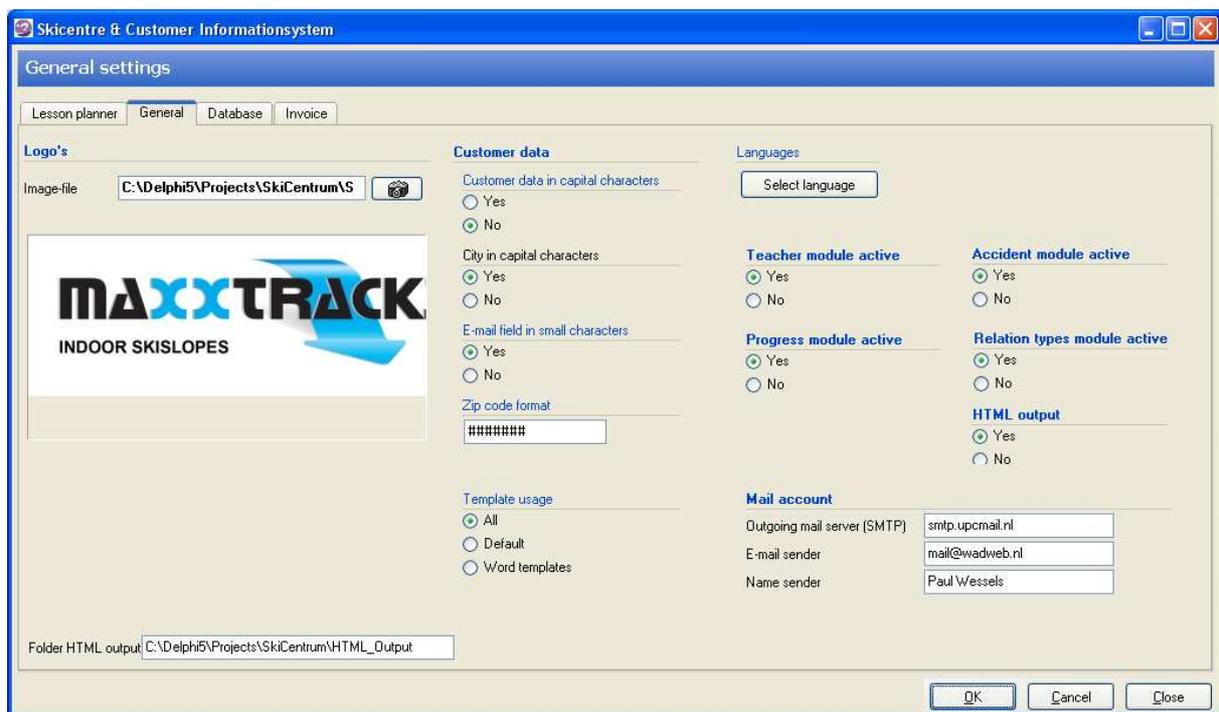
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Now go to *File* → *General Settings* in SKI. Open the tab *General*. Fill in the three fields under the heading **Mail Account**.

- Enter the SMTP address in the Outgoing mail server (SMTP)
- Enter e-mail address Sender (same email address as just found in Outlook)
- Enter name of the sender (free input, the name may differ from the name attached to this email address in Outlook)

Then click [OK] to confirm your settings.



Make Selection

There are two ways to make the selection of the customers for the mailing:

- the customer screen
- the customer selection screen

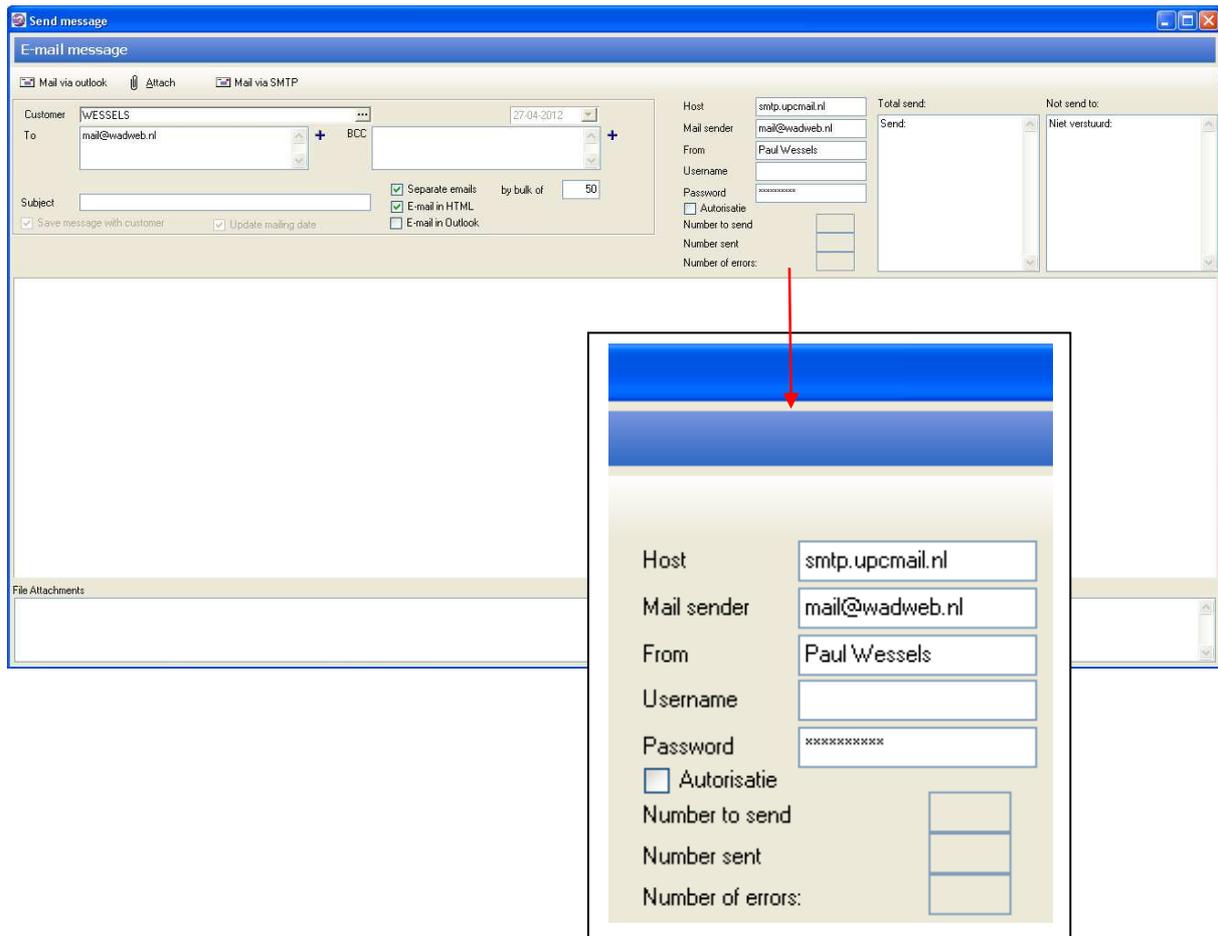
Make the selection. Press the **e-mail** button or click **right** and choose **Emailing**.

The e-mail screen opens. The email addresses of all selected customers appear in the BCC.

If necessary e-mail addresses can be added manually.

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Note: If sending e-mails per SMTP the following error message may appear:

*Relaying denied
proper authentication required*

Action:

add **Username and password** (found in Outlook) and place a checkmark in field **Authorization**.

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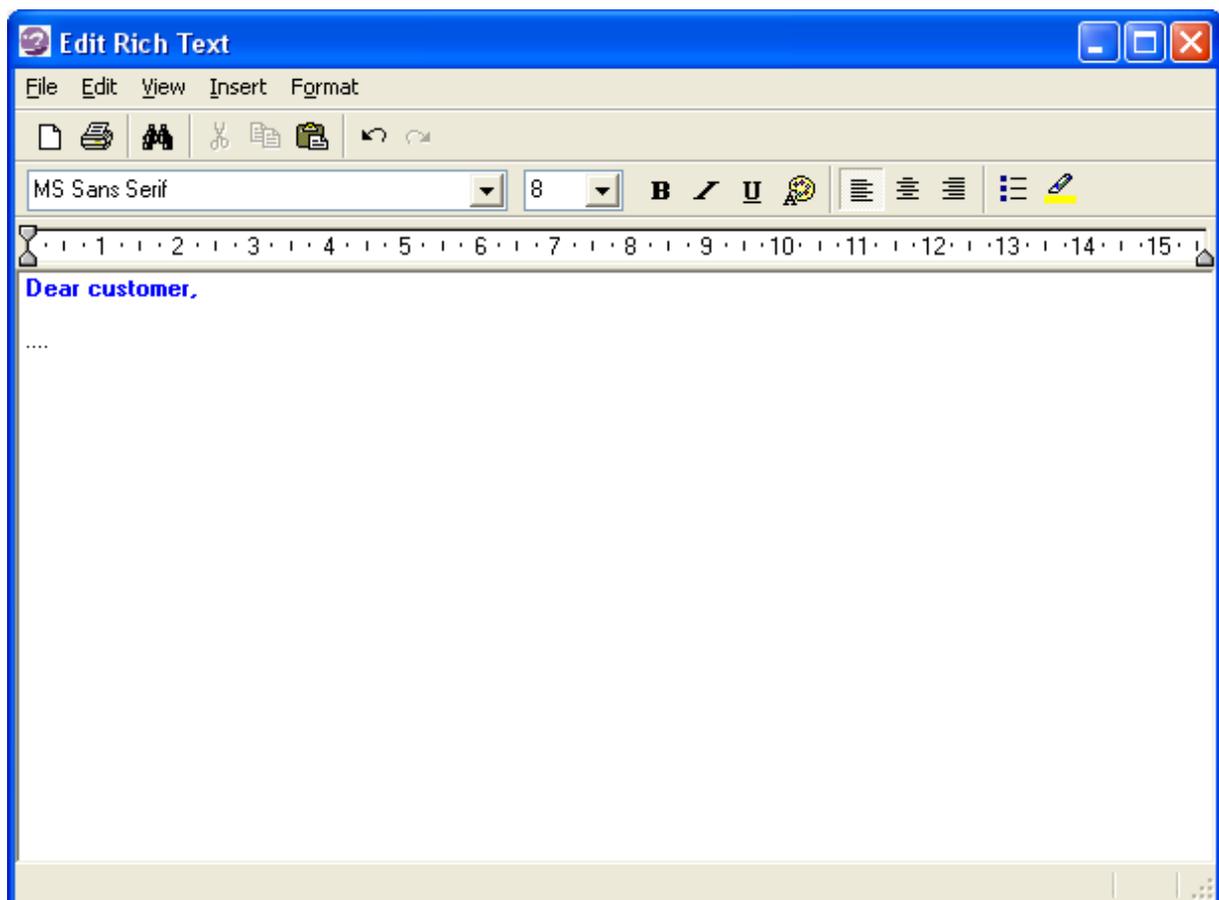
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Edit Message



Click in the text of the e-mail and type the text. Click the right mouse button to call up a simple text editor, choose **Edit**.

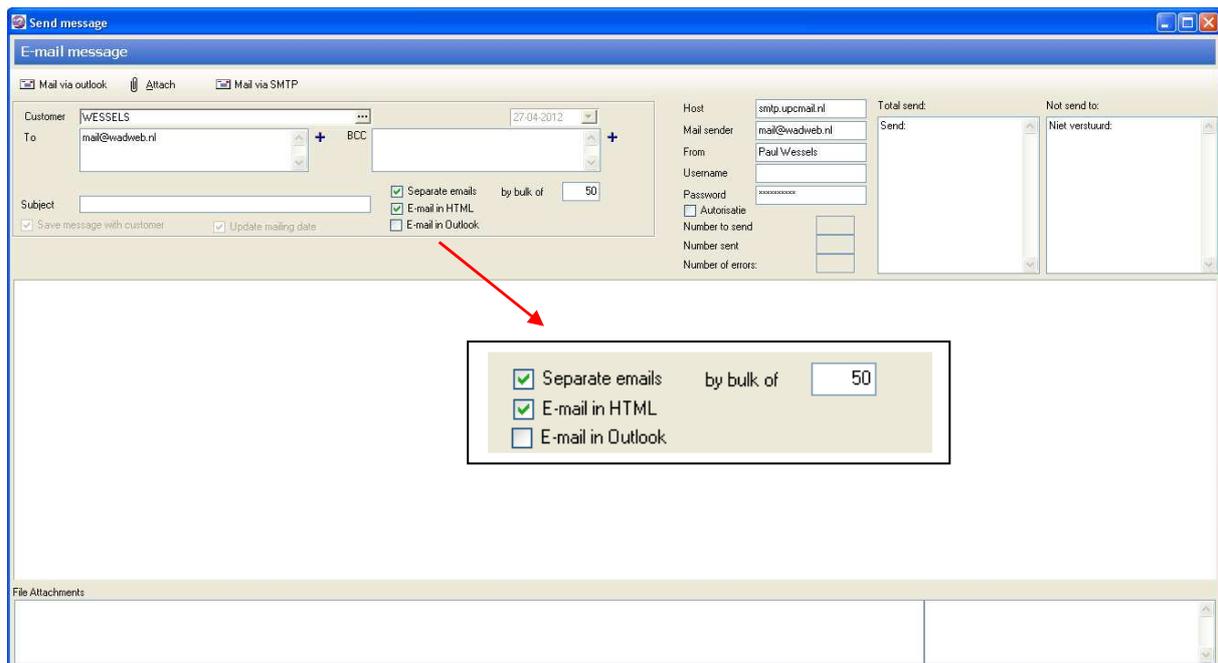
The editor provides a number of options for formatting the text.



After formatting of the text, the screen can be left by the cross from the right pane. You will return to the E-mail message.

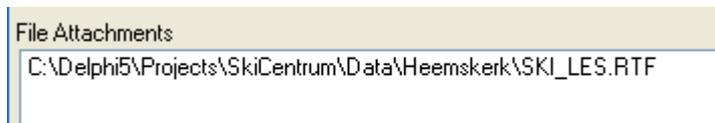
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Note ! Rich text (with formatting) requires option **E-mail in HTML** to be set **ON**.

To add an attachment click button



The filename of added file appears at the bottom of the screen under "File Attachments".

Send E-mails



The option "Separate emails by bulk of" can be used to send out e-mails in sets of x-numbers and let the server make a new connection for each set. This can be useful or necessary if the e-mails are indicated somehow as a form of spam. If sending one by one or limited sets at a time this will not happen. Sending out e-mails will take a lot more time this way.

Set to "Separate emails by bulk of" a 1, then per e-mail a new connection is made to the mail server.

Caution! Choosing the proper bulk size is highly dependent on your own provider. Some providers have a quota set so that no more than x amount of e-mails within a certain time can be sent. Advice is not too large quantities at a time to send.

Start now to send by clicking one of the submit buttons;

Choose *Mail via Outlook* if the number of emails per load is under 50.

Choose *Mail via SMTP* for larger quantities at a time.

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The screenshot shows the 'E-mail message' interface. At the top, there are three options: 'Mail via outlook', 'Attach', and 'Mail via SMTP'. Below this, the 'Customer' field is set to 'WESSELS' with a dropdown arrow. To the right, the date '27-04-2012' is displayed. The 'To' field contains 'mail@wadweb.nl' and has a '+' sign. The 'BCC' field is empty and also has a '+' sign. The 'Subject' field is empty. There are three checkboxes: 'Save message with customer' (checked), 'Update mailing date' (checked), and 'E-mail in Outlook' (unchecked). To the right of these checkboxes, there are two checked options: 'Separate emails' and 'E-mail in HTML'. Next to them is the text 'by bulk of' followed by a text box containing the number '50'.

If the e-mail account settings are correct, the results appear at the left of the screen. Right at the top of the screen is shown which e-mails are sent and which have failed due to incorrect or non-existence of the e-mail address. Record these for correction.

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Status: Disconnected.

Status: Disconnecting.

Status: attachment

StatusEncoding: Encoding text

Status: Encoding text

Status: Connected.

Status: Connecting to 213.46.255.2.

Status: Resolving hostname smtp.upcmail.nl.

If the shipping process has terminated, then the sum *Number of errors + Number sent (bulk)* must equal the Number to send. The screen can be closed.

Host	smtp.upcmail.nl	Total send:	Send: mail@wadweb.nl	Not send to:	Foute emails:
Mail sender	mail@wadweb.nl				
From	Paul Wessels				
Username					
Password	*****				
<input type="checkbox"/> Autorisatie					
Number to send	1				
Number sent	2				
Number of errors:					

Tip! Set in the **To** or **Bcc**'s your own email address (from the ski center) to check that the e-mail is sent correctly and how the e-mail message is presented.

Error sending by SMTP, e-mails sent:

If no email is sent and the following error:

*Relaying denied
proper authentication required*

fill out the in Outlook found **login information** and place a checkmark next to **Authorization**.

Note:

With the e-mail module, messages in (formatted) text and an with appendix can be sent out. **It is not (yet) possible to use images within the e-mail/text.**

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APPENDIX C KEY COMBINATIONS

Use the following keyboard shortcuts for controlling the application SKI by using the keyboard.

Jump to / Action	Shortcut
Next field	Tab
Previous field	Shift-Tab
Switching between open windows	CTRL-TAB
shortcut, buttons / menus	ALT + underlined letter
the current window	CTRL + F4 or Esc (ape)
Combo / window	ALT + down
the current window or program close	ALT + F4
Copy	CTRL + C
Cut	CTRL + X
Paste	CTRL + V
Undo	CTRL + Z
Insert	Insert
Delete	Delete
the System menu of the current window	ALT+ SPACEBAR Open
the shortcut menu for the selected item	Shift + F10
Displays the Start menu.	CTRL + ESC
the last used window activate -or-another window activate the ALT key while you repeatedly press TAB.	ALT + TAB

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