

ScoutMap

# Booking Management



# COURSE OUTLINE

Here's what you'll find in this course:

- General Overview
- Create a Booking: Portal User
- View/Modify a Booking
- How to do payment
- How to create new accommodation
- How to create new Adventure Centre
- How to Add Services and Equipment
- How to Cancel a Booking
- View Cancelled bookings
- Create a Booking: Head Office



## General Overview



## What is a Booking in Salesforce?



A **Booking** is called as a Reservation of the type booking

## What is an Adventure Centre in Salesforce

An **Adventure Centre** is called as a Resource in Salesforce

## What is an Accommodation in Salesforce

An **Accommodation** is called as a Resource in Salesforce with parent as **Adventure Centre**

## Create a Booking

Role: Registered Portal User



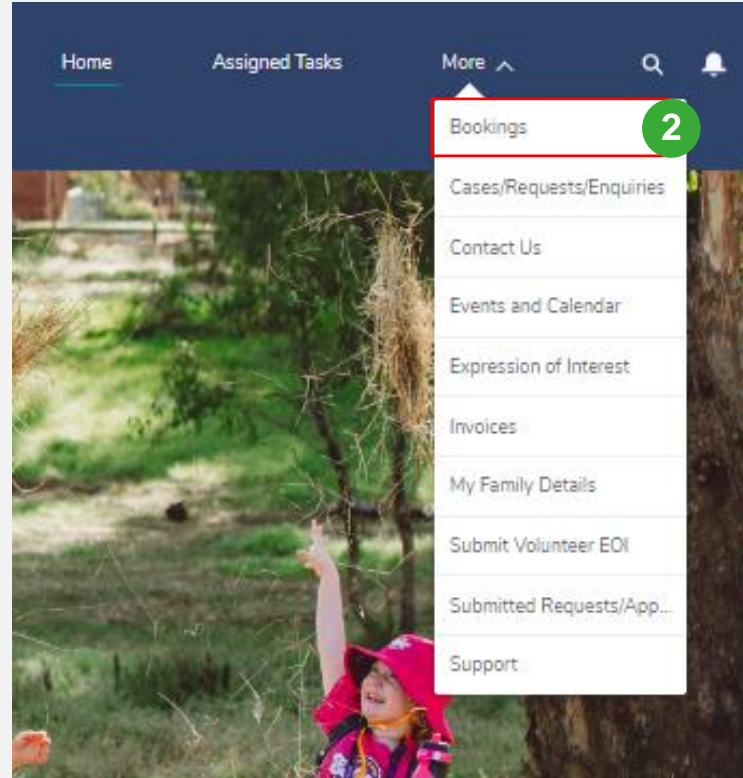
# Create a New Booking

## Registered User/Booking Coordinator



1 Log on to Portal

2 Go to Bookings Tab



# Create a New Booking

## Registered User/Booking Coordinator

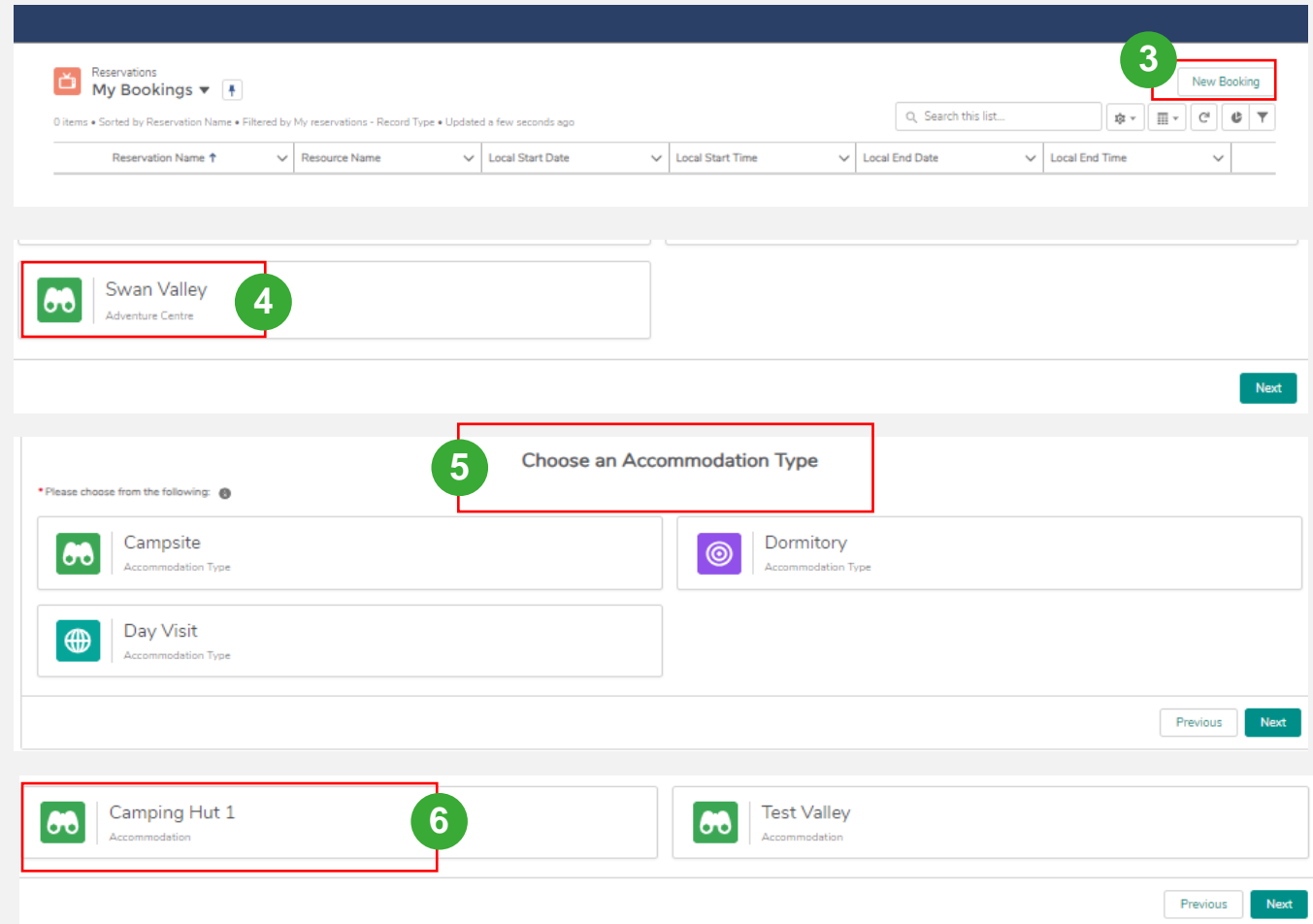


3 Click on New Booking Button

4 Select the Adventure Centre

5 Select the Accommodation type

6 Select the accommodation



The screenshot shows a web interface for creating a new booking. At the top, there is a navigation bar with 'Reservations My Bookings' and a 'New Booking' button (callout 3). Below this is a search bar and a table of reservations. The first step is to click the 'New Booking' button. The second step is to select an Adventure Centre, with 'Swan Valley Adventure Centre' highlighted (callout 4). The third step is to select an Accommodation Type, with a dropdown menu showing 'Campsite', 'Dormitory', and 'Day Visit' (callout 5). The fourth step is to select the accommodation, with 'Camping Hut 1' highlighted (callout 6). The interface also includes a 'Next' button at the bottom right of each step.

# Create a New Booking


## Registered User/Booking Coordinator




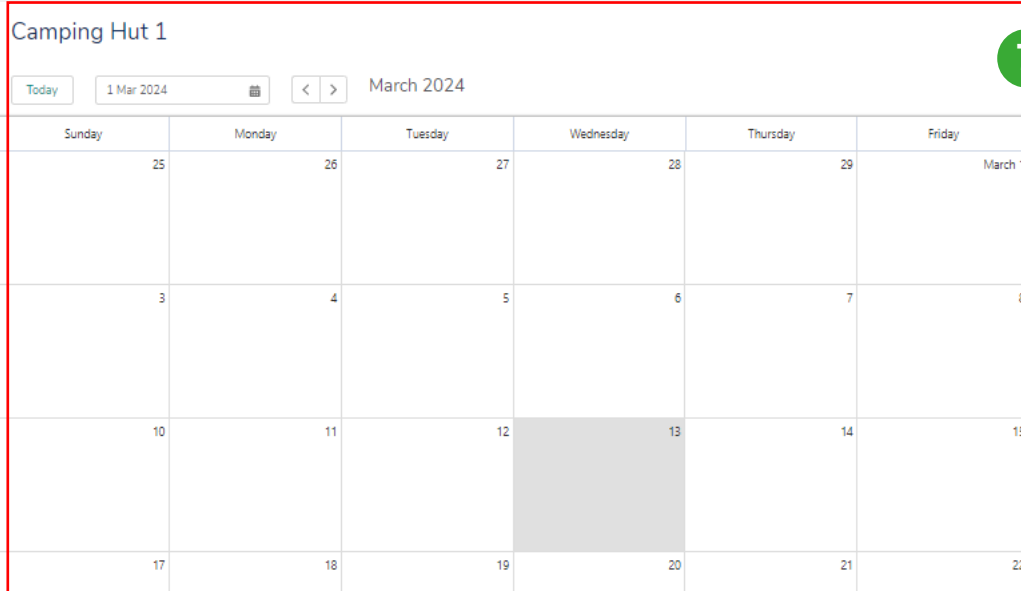
7

Double-click to select the date & time from the calendar view

Camping Hut 1

Today 1 Mar 2024  < > March 2024

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
25	26	27	28	29	March 1
3	4	5	6	7	8
10	11	12	13	14	15
17	18	19	20	21	22





# Create a New Booking

## Registered User/Booking Coordinator



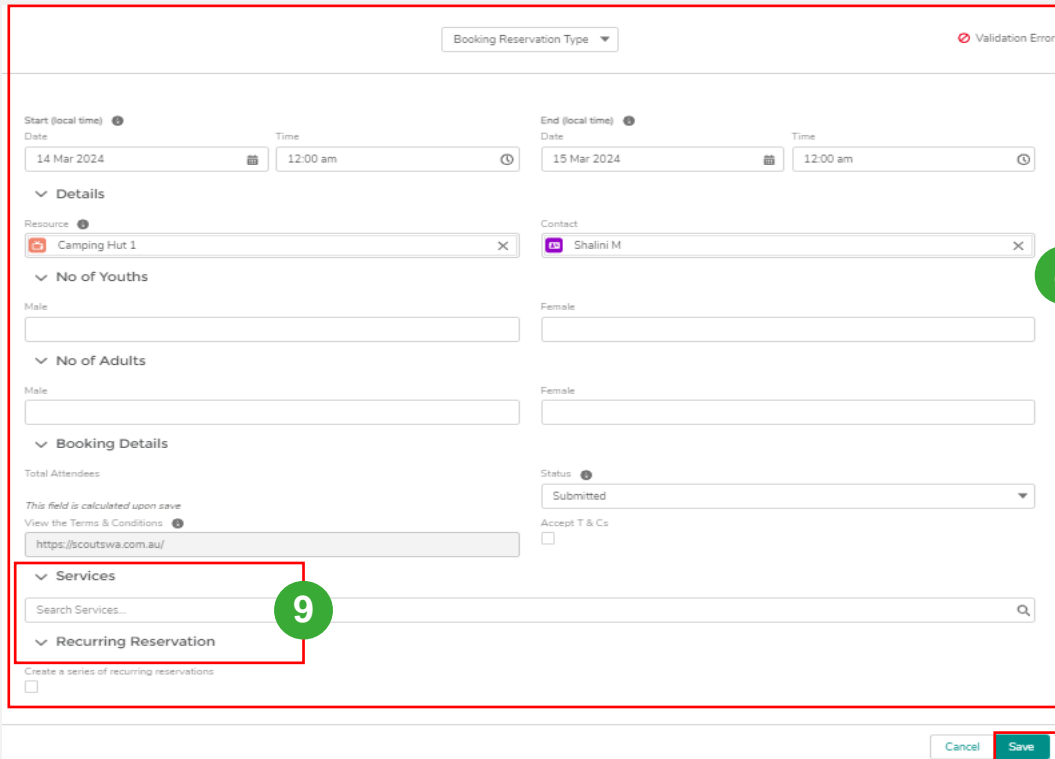
8 Update booking details

9 Add Service & Equipment

10 Click on Save

You will receive a booking request number

11 Click on Next



Booking Reservation Type Validation Error

Start (local time) End (local time)

Date: 14 Mar 2024 Time: 12:00 am Date: 15 Mar 2024 Time: 12:00 am

Details

Resource: Camping Hut 1 Contact: Shalini M

No of Youths

Male: Female:

No of Adults

Male: Female:

Booking Details

Total Attendees

This field is calculated upon save

View the Terms & Conditions <https://scoutswa.com.au/>

Status: Submitted

Accept T & Cs

Services

Search Services...

Recurring Reservation

Create a series of recurring reservations

Cancel Save

Thank you for your booking.

We have received your booking enquiry. Your booking reference number is

If you have any questions or need further assistance, please don't hesitate to contact our Adventure Centres team call 08 9525 1210 or Email: [sitecoordinator@scoutswa.com.au](mailto:sitecoordinator@scoutswa.com.au)

11 Next

# How to view/modify a Booking Request

Role: Booking Coordinator



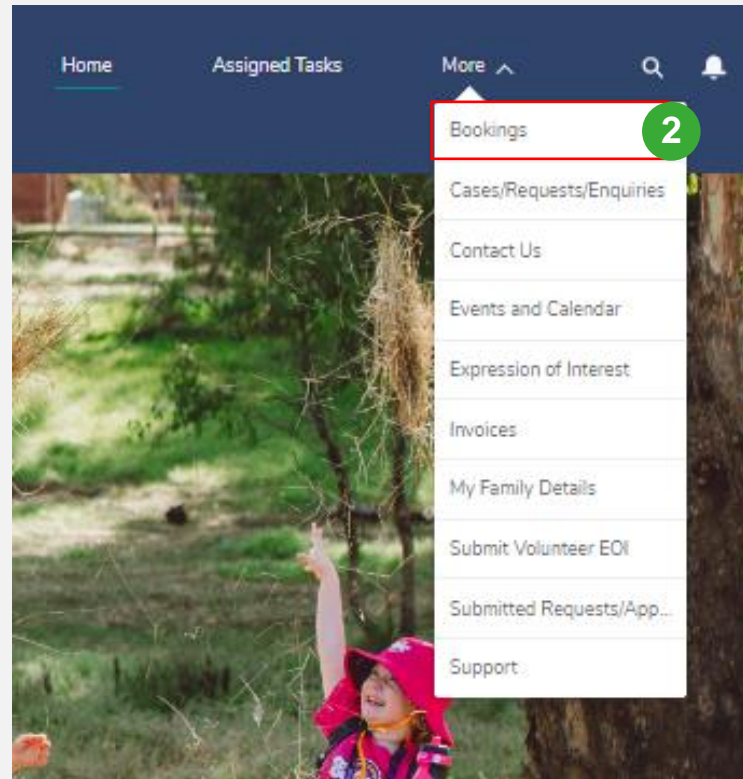
# View/modify Booking Request

## Registered User/Booking Coordinator



1 Log on to Portal

2 Go to Bookings Tab



# View/modify Booking Request

## Booking Coordinator



3 Go to Pending Booking

4 Click on reservation name to view details

5 Click on pencil icon on status and update status to In Review

### **If a deposit is required**

1 Update checkbox Deposit Required

2 Update status to Pending deposit Payment

Pending Booking Bookings Requesting Cancellations My Bookings



Pending Booking 3

7 items • Sorted by Reservation Name • Filtered by All reservations - Status, Record Type • Updated a few seconds ago

	Reservation Name ↑	Resource Name	Status	Local Start Datetime	Local End Datetime	Created By
1	R-000133 4	Swan Valley (Duidgee, Country North Region)		2024-02-03 12:30	2024-02-03 13:00	Yasin Sheik
2	R-000134	Swan Valley (Duidgee, Country North Region)		2024-02-02 14:30	2024-02-02 15:00	Yasin Sheik
3	R-000136	Swan Valley (Duidgee, Country North Region)		2024-02-02 16:30	2024-02-02 17:00	Yasin Sheik

DETAILS RELATED

▼ Reservation Information

Reservation Name R-000133	Contact Yasin Sheik
Reservation Type Booking Reservation Type	Status 5 
Resource Swan Valley	Accept T & Cs <input checked="" type="checkbox"/>
View the Terms & Conditions https://scoutswa.com.au/	Booking Amount 40.00
Total Attendees 0	1 Deposit Required <input type="checkbox"/> 
	Deposit Amount

Pend

Show All Results for "Pend"

- Pending Deposit Payment
- Pending Approval
- 2 Pending Final Payment
- Pending

# View/modify Booking Request

## Booking Coordinator



### If a deposit is not required

- 1 Update status to Pending Final Payment

**DETAILS**    RELATED

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**Reservation Information**

Reservation Name R-000133	Contact Yasin Sheik
Reservation Type <u>Booking Reservation Type</u>	Status <input type="text" value="Pending"/>
Resource Swan Valley	Accept T & Cs <input checked="" type="checkbox"/>
View the Terms & Conditions <a href="https://scoutswa.com.au/">https://scoutswa.com.au/</a>	Booking Amount 40.00
Total Attendees 0	Deposit Required <input type="checkbox"/>
	Deposit Amount

Pend

- Show All Results for "Pend"
- Pending Deposit Payment
- Pending Approval
- Pending Final Payment 1**
- Pending

# View/modify Booking Request

## Booking Coordinator



### To Update services or Equipment on Booking

1 On Booking details go Service Reservations section



Click on new


2 You get a screen to add new service or reservation

Click on Save

3

DETAILS    RELATED

1  Service Reservations (1)  2


Service Reservation Name	Service	Quantity	Time
<a href="#">SR-000000015</a>	Swimming	4	


View All


New Service Reservation


Information \* = Required Information



Service Reservation Name


Service 




Quantity 

\* Reservation 

 R-000133 

Notes 


Unit Price 

Start Date

Date  Time


End Date

Date  Time

Time 

Date  Time

Key

3 

Cancel    Save & New    Save

# View/Modify Booking

## Booking Coordinator

### ▶▶ Note:

#### **If a Deposit Payment is required**

1. The user will receive a booking confirmation email
2. 7 days before the booking date, the user will receive a Final Invoice email
3. The user will receive a booking finalised email prior to the booking date

#### **If a Deposit payment is not required**

1. The user will receive a booking confirmation email along with a final invoice
2. 7 days before the booking date, the user will receive a Final Invoice email
3. The user will receive a booking finalised email prior to the booking date

#### **Generating a final invoice**

7 days before the final booking date, a final invoice is generated and sent to the user for payment

**Note:** All changes to the booking amount before the final invoice is generated can be updated and sent as a part of final invoice. For changes after final invoice. Invoice must be created manually, and its payment needs to be tracked manually.

# How to complete payment booking

Role: Portal User



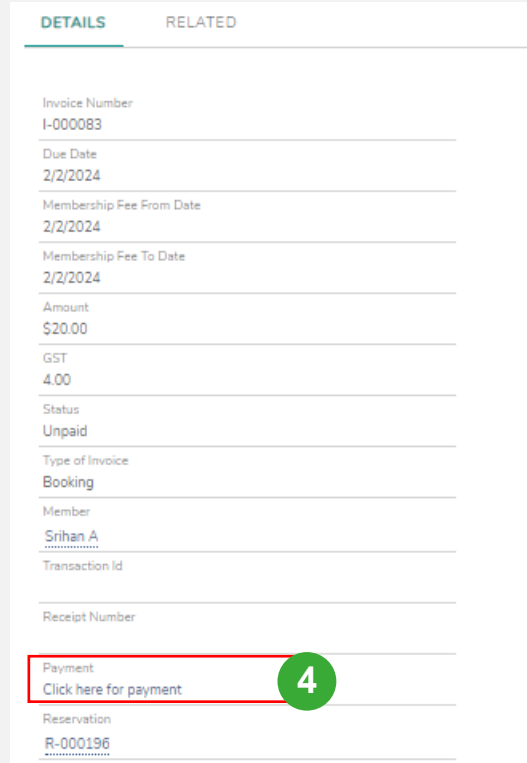
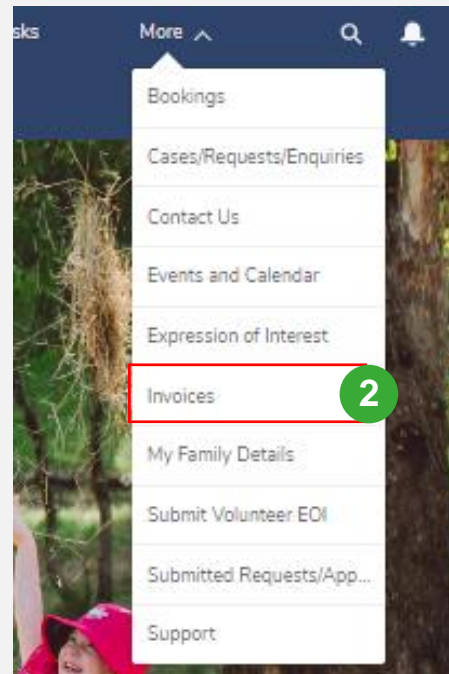


# Complete the Payment

## Portal User



When a booking is moved to Pending Deposit Payment or Pending Final Payment you will receive an email for completing payment



20+ items • Sorted by Type of Invoice • Filtered by All Invoices

Invoice Number	Type of Invoice ↓	Status
I-000131	Booking	Unpaid
I-000130	Booking	Unpaid

1

Log on to Portal

2

Go to Invoices

3

Click on Invoice Number ensure the status is Unpaid and the type is booking

4

On Invoice detail page, click on Click here for Payment

# Complete the Payment

## Parent



5 Select Payment Method

6 Provide details

7 Click on Pay

Amount Payable : \$null

Please select payment method

Credit Card  Bank Account **5**

Account Name

SMITH, JOHN

BSB

999-999

Account Number

9999999999 **6**

Pay **7**

## Update a Payment/Invoice

Role: Finance Team/Booking Coordinator

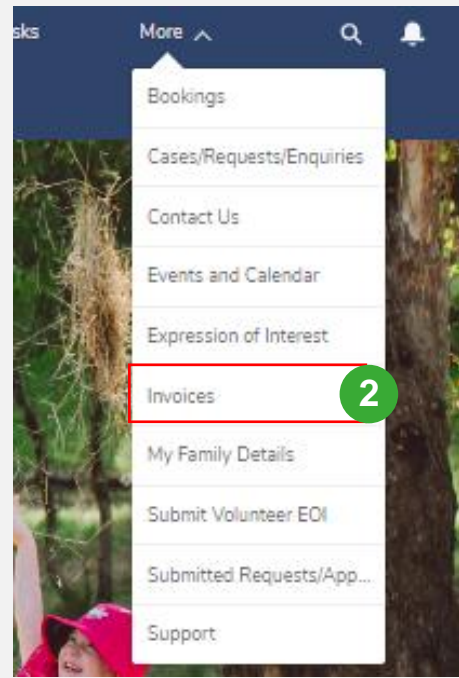


# Update the Unpaid Invoice



## Finance Team



- 1 Log on to Salesforce
- 2 Go to Invoices Tab
- 3 Select the Unpaid Invoice from the list
- 4 Select the Invoice
- 5 Update the status by clicking on pencil icon
- 6 Update the transaction reference number and Save



Invoice **I-000061**

Details		Related
Invoice Number	I-000061	
Due Date	2/2/2024	
Membership Fee From Date	2/2/2024	
Membership Fee To Date	2/2/2024	
Amount		
GST	0.00	
Status	Unpaid	
Type of Invoice	Booking	
Member	Esha Singh	
Transaction Id		
Receipt Number		
Reservation	R-000108	

20+ items • Sorted by Type of Invoice • Filtered by All Invoices

Invoice Number	Type of Invoice	Status
I-000061	Booking	Unpaid
I-000078	Booking	Unpaid
I-000079	Booking	Unpaid

## Create New Accommodation

Role: Adventure Centre Team

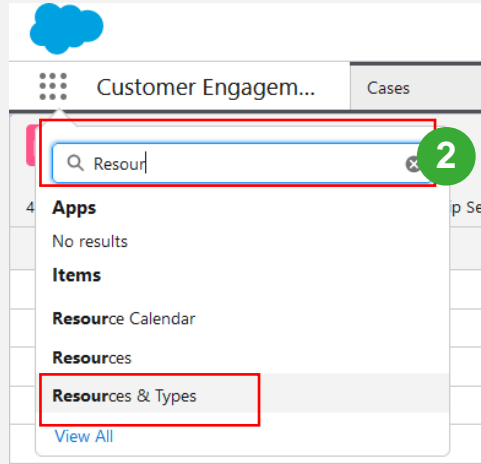


# Create New Accommodation

## Head office



- 1 Log on to Salesforce
- 2 Search for Resources & Types in app launcher
- 3 Search for Adventure Centre where you want to create a new accommodation



The screenshot shows the Salesforce app launcher interface. At the top, there is a search bar with the text "Resour" entered. A red box highlights the search bar, and a green circle with the number "2" is next to it. Below the search bar, there are several categories: "Apps" (No results), "Items" (Resource Calendar), and "Resources" (Resources & Types). The "Resources & Types" option is highlighted with a red box. Below it, there is a "View All" link.

## Resources

Scouts WA > Country North Region > Duidgee > Swan Valley

### RESOURCES

RESOURCE TYPE(S)

Swan

- Scouts WA
  - Country North Region
    - Duidgee
      - Swan Valley 3
        - Campsite
          - Aganoa Track (AT1)
          - Aganoa Track (AT2)
          - Burnt Balga Way 1 (BBW1)
          - Burnt Balga Way 2 (BBW2)
          - Camping Hut 1

# Create New Accommodation

## Head office



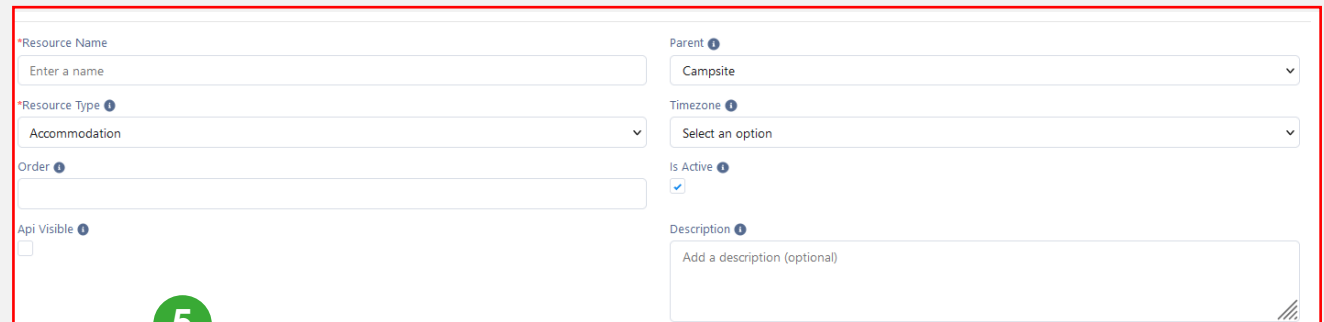
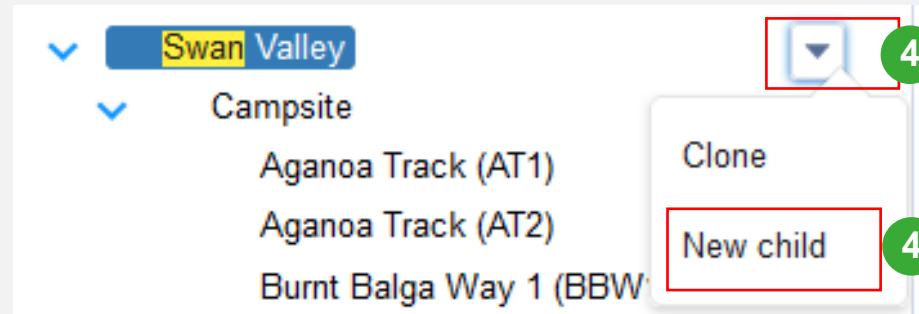
4

Click on the drop down besides Accommodation type select new child

5

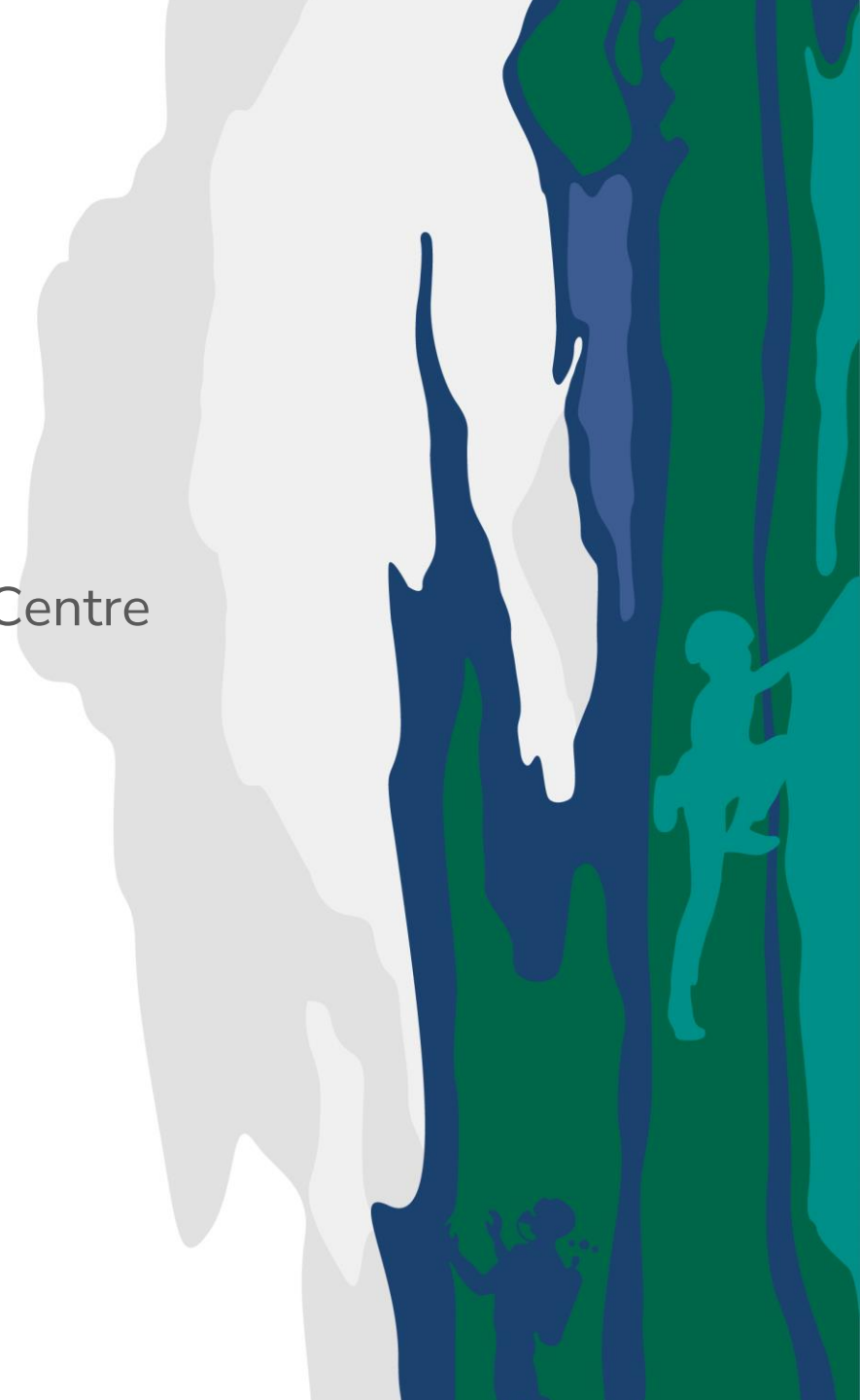
Update the details

- Set Time zone as 'Australia/Perth',
- is ACTIVE = true ,
- Api Visible = False



## Scenario 4

Create new Adventure Centre: Adventure Centre Team



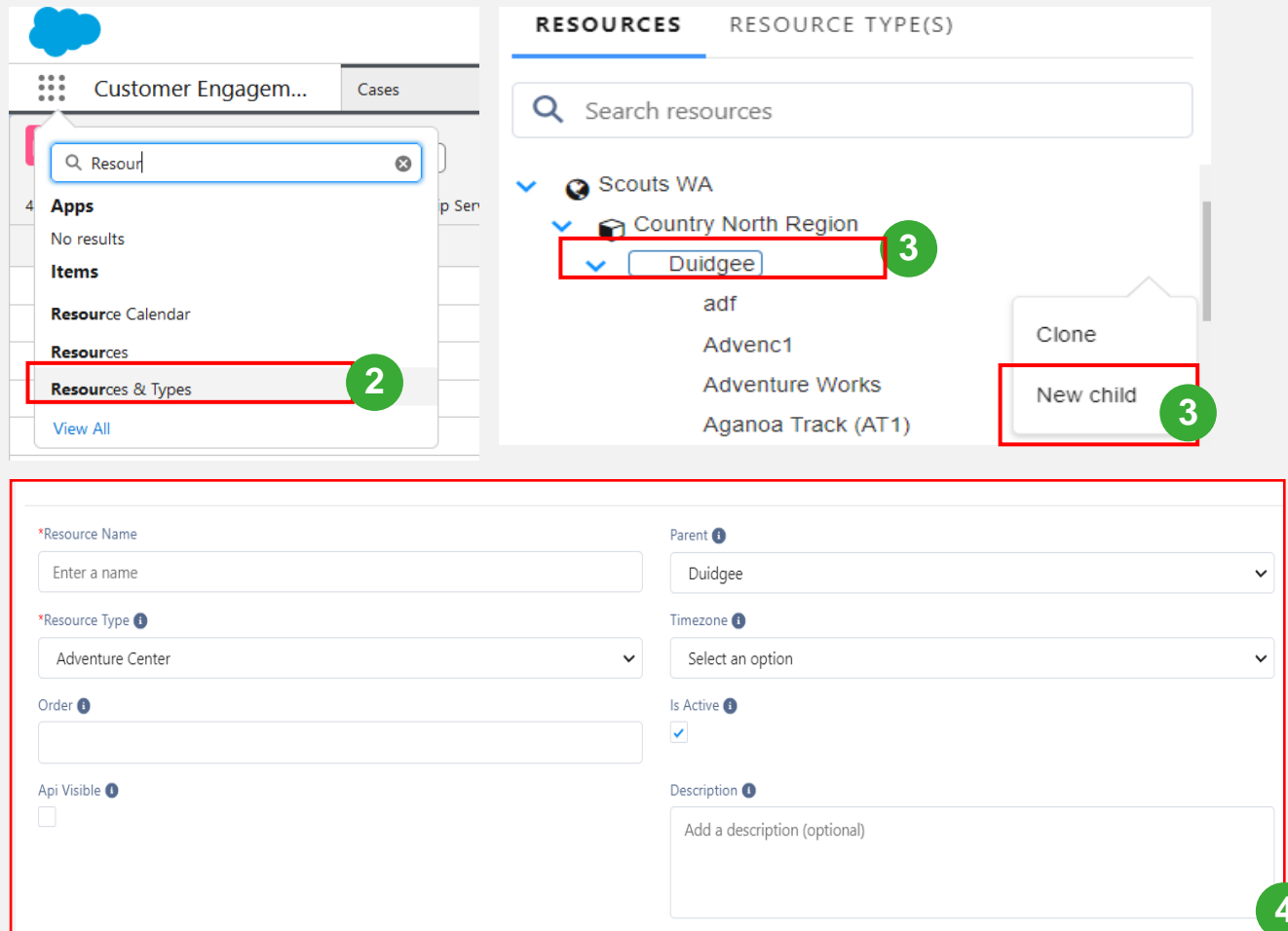


# Create new Adventure Centre

## Head office



- 1 Log on to Salesforce
- 2 Search for Resources & Types in app launcher
- 3 Search for Region when you want to create a new Adventure
  - Click on the drop down besides region and select new child
- 4 Update the details
  - Select resource type as Adventure Centre
  - Set Time zone as 'Australia/Perth',
  - isActive = true ,
  - Api Visible = false



The screenshot shows the Salesforce interface for creating a new resource. It is divided into three main sections:

- App Launcher (Left):** A search bar contains 'Resour'. The 'Resources & Types' option is highlighted with a red box and a green circle with the number 2.
- Resources List (Middle-Right):** The list shows 'Scouts WA' > 'Country North Region' > 'Duidgee'. The 'Duidgee' item is highlighted with a red box and a green circle with the number 3. Below it, the 'New child' button is also highlighted with a red box and a green circle with the number 3.
- Resource Creation Form (Bottom):** A form is shown with the following fields:
  - \*Resource Name: Enter a name
  - Parent: Duidgee (dropdown)
  - \*Resource Type: Adventure Center (dropdown)
  - Timezone: Select an option (dropdown)
  - Order: (empty text field)
  - Is Active:
  - Api Visible:
  - Description: Add a description (optional) (text area)

# How to Add Services & Equipment



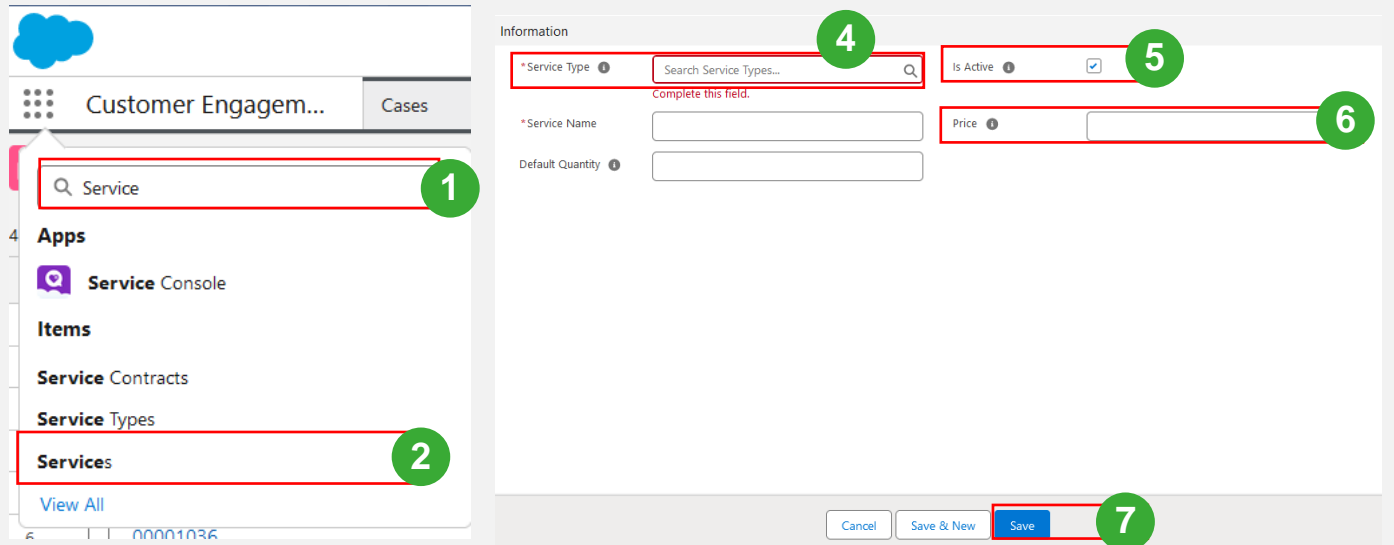
# How to Add Services & Equipment

## Head office



### Create New Activity or Equipment

- 1 Go to App launcher
- 2 Select Services
- 3 Click on New
- 4 Select Service Type Activity or Equipment
- 5 Is active=True
- 6 Update price
- 7 Click on Save



Customer Engagem... Cases

Search Service

Apps

- Service Console

Items

- Service Contracts
- Service Types
- Services**

View All

Information

\*Service Type Search Service Types... complete this field.

Is Active

\*Service Name

Price

Default Quantity

Cancel Save & New Save

Services

All

9 Items • Sorted by Service Name • Filtered by All services • Updated a few seconds ago

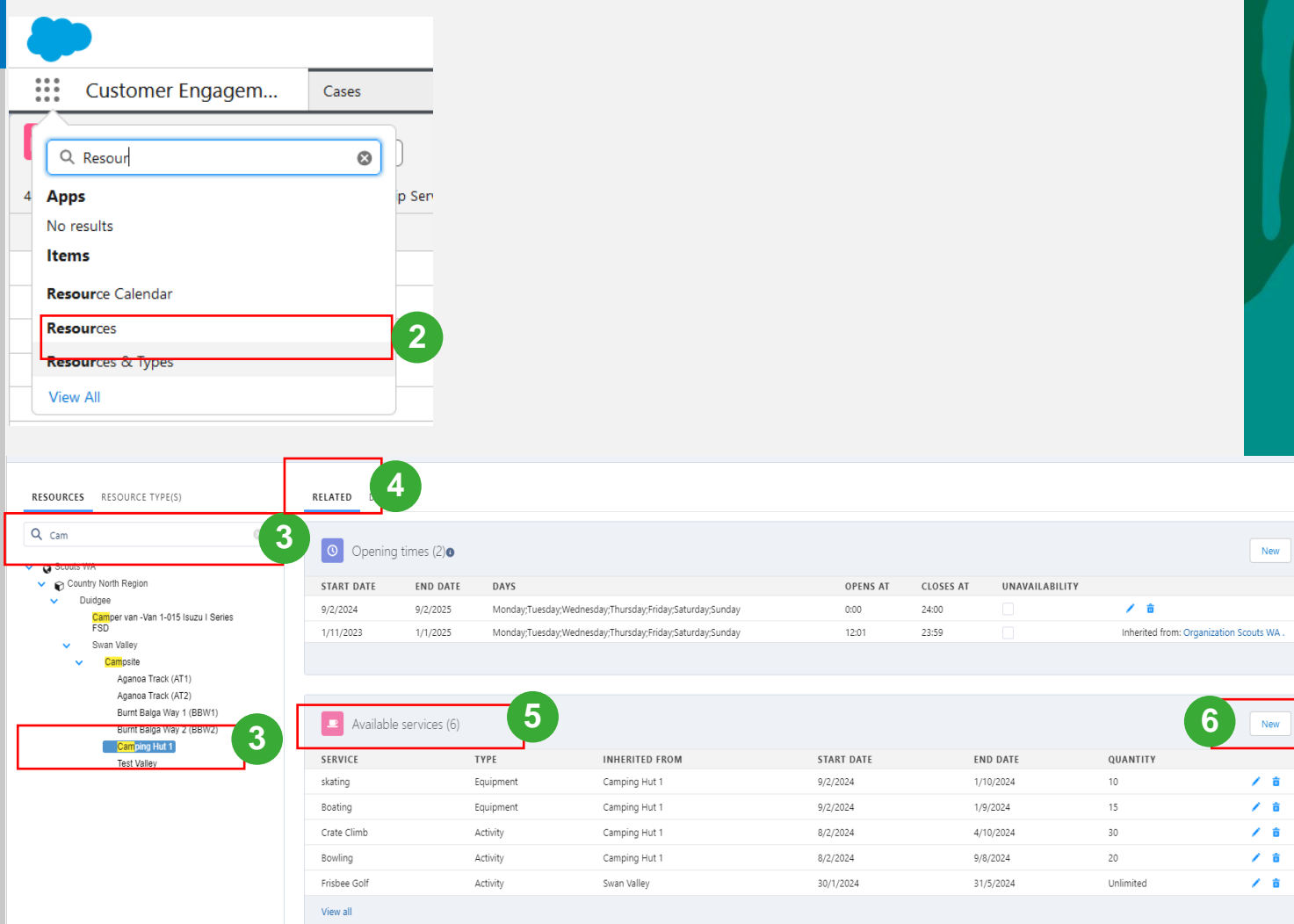
Search this list...

	Service Name ↑	Service Type	Price	Default Quantity	Is Active
1	<input type="checkbox"/> Boating	Equipment	\$50.00	20	<input checked="" type="checkbox"/>
2	<input type="checkbox"/> Bowling	Activity	\$30.00	5	<input checked="" type="checkbox"/>
3	<input type="checkbox"/> bungee jumping	Equipment		25	<input checked="" type="checkbox"/>
4	<input type="checkbox"/> Crate Climb	Activity	\$13.50	10	<input checked="" type="checkbox"/>
5	<input type="checkbox"/> Frisbee Golf	Activity	\$5.00	20	<input checked="" type="checkbox"/>
6	<input type="checkbox"/> Shooting	Activity	\$20.00	8	<input checked="" type="checkbox"/>
7	<input type="checkbox"/> skating	Equipment		15	<input checked="" type="checkbox"/>
8	<input type="checkbox"/> Swimming	Activity	\$10.00	4	<input checked="" type="checkbox"/>
9	<input type="checkbox"/> VR	Activity			<input checked="" type="checkbox"/>

New Import Printable View

# How to Add Services & Equipment

## Head office

**1** Make Equipment or Services Available for booking

**2** Search for Resources & Types in app launcher

**3** Search & Select where you want to add a new service or Equipment

**4** In related Tab,

**5** Go to Available services

**6** Click on new

**Customer Engagement... Cases**

Search: Resour

**4** Apps  
No results

**Items**

Resource Calendar

**Resources** **2**

Resources & Types

[View All](#)

**RESOURCES** RESOURCE TYPE(S) **RELATED** **4**

Search: Cam **3**

Scouts WA

- Country North Region
  - Duidgee
    - Camper van - Van 1-015 Isuzu I Series
    - FSD
  - Swan Valley
    - Campsite
      - Aganoa Track (AT1)
      - Aganoa Track (AT2)
      - Burnt Balga Way 1 (BBW1)
      - Burnt Balga Way 2 (BBW2)
      - Camping Hut 1** **3**
      - Test Valley

**Opening times (2)** **5**

START DATE	END DATE	DAYS	OPENS AT	CLOSES AT	UNAVAILABILITY
9/2/2024	9/2/2025	Monday;Tuesday;Wednesday;Thursday;Friday;Saturday;Sunday	0:00	24:00	<input type="checkbox"/>
1/11/2023	1/1/2025	Monday;Tuesday;Wednesday;Thursday;Friday;Saturday;Sunday	12:01	23:59	<input type="checkbox"/> Inherited from: Organization Scouts WA.

**Available services (6)** **6**

SERVICE	TYPE	INHERITED FROM	START DATE	END DATE	QUANTITY
skating	Equipment	Camping Hut 1	9/2/2024	1/10/2024	10
Boating	Equipment	Camping Hut 1	9/2/2024	1/9/2024	15
Crate Climb	Activity	Camping Hut 1	8/2/2024	4/10/2024	30
Bowling	Activity	Camping Hut 1	8/2/2024	9/8/2024	20
Frisbee Golf	Activity	Swan Valley	30/1/2024	31/5/2024	Unlimited

[View all](#)

# How to Add Services & Equipment

## Head office



### 7 Update the details

- Search for the service which needs to be made available for booking
- Update start date & end date

### 8 Click save

## New service availability

7

\*Service 



\*Start Date 

\*End Date 

Quantity 

Cancel

Save

8

## How to Cancel a Booking

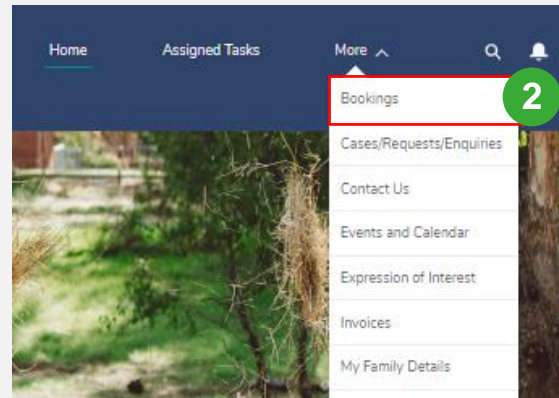


# Cancel a Booking

## Portal User



- 1 Log on to Portal
- 2 Go to Bookings Tab
- 3 Under My Bookings, click on the Booking Number
- 4 In booking details, click on Cancel Booking



Reservations  
My Bookings

18 items • Sorted by Reservation Name • Filtered by My reservations - Record Type • Updated a few seconds ago

Search this list...

	Reservation Name	Resource Name	Local Start Date	Local Start Time	Local End Date	Local End Time	
1	R-000183	Swan Valley (Duidgee, Country North Region)	3/2/2024	08:30	3/2/2024	10:30	
2	R-000260	Camping Hut 1 (Campsite, Swan Valley)	9/2/2024	08:00	9/2/2024	10:00	
3	R-000297	Camping Hut 1 (Campsite, Swan Valley)	14/2/2024	00:00	14/2/2024	02:00	

Reservation  
R-000183

+ Follow   New Note   **Cancel Booking**

DETAILS   RELATED

Reservation Information

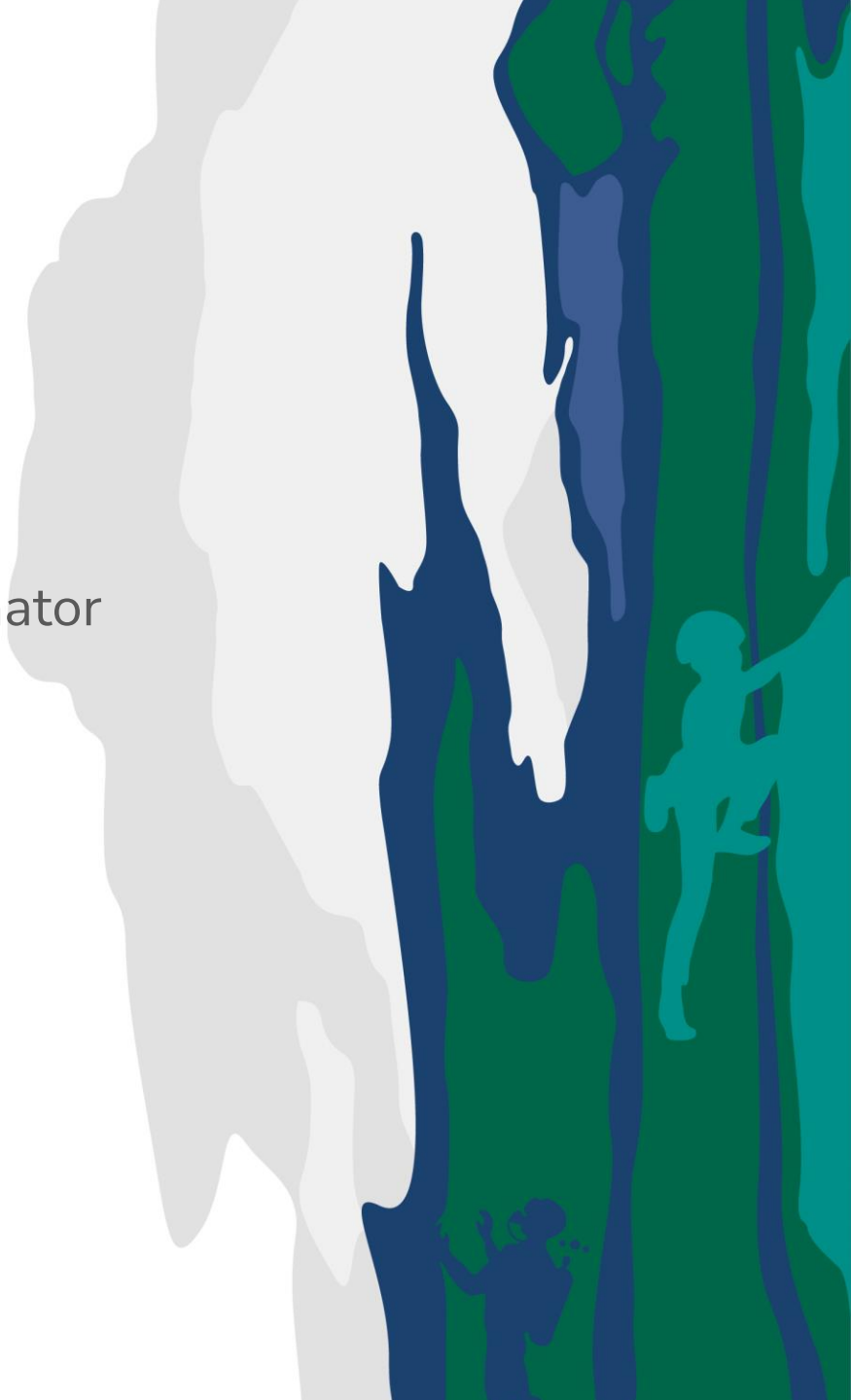
Reservation Name	Contact
R-000183	Jennith A
Reservation Type	Status
Booking Reservation Type	Submitted

Post   Question   Poll

Share an update...

Search this feed...

View Cancelled Bookings: Booking Coordinator





# View Cancelled Booking

## Booking Coordinator

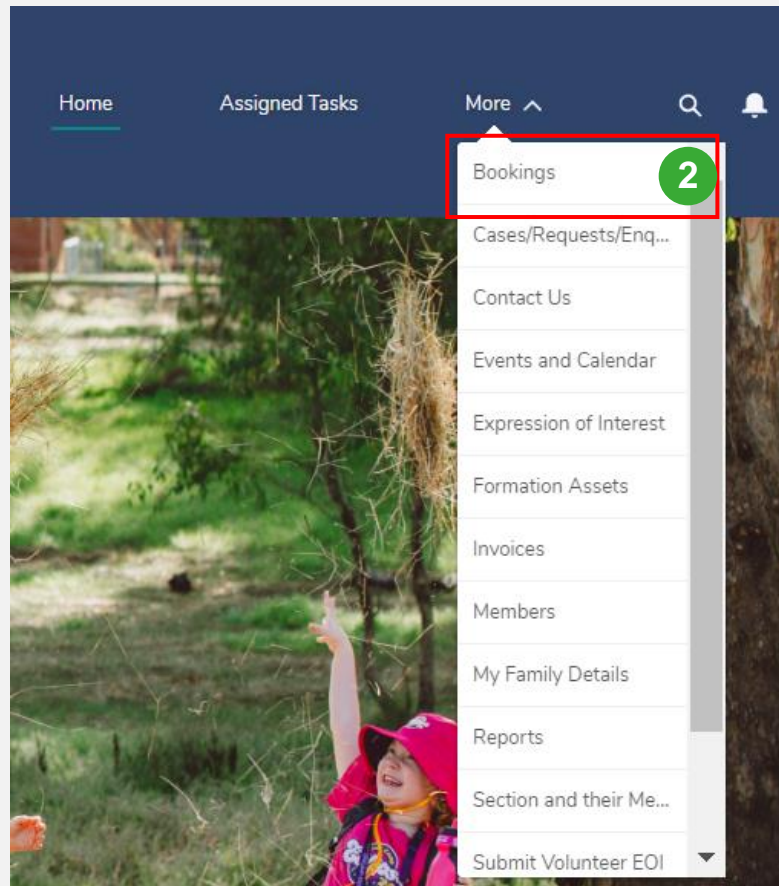


1

- Log on to Portal

2

- Go to Bookings Tab



# View Cancelled Booking

## Booking Coordinator



3

- Go to Booking Cancellation Requests section

4

- Select the booking

5

- On booking details Click on pencil icon besides status

Pending Booking: **Bookings Requesting Cancellations** 3

**Bookings Requesting Cancellations**

1 item • Sorted by Reservation Name • Filtered by All reservations - Status, Record Type • Updated a few seconds ago

Search this list...

Reservation Name	Local Start Datetime	Local End Datetime	Created By
1 R-000297 <span>4</span>	2024-02-14 00:00	2024-02-14 02:00	Jennith A

**DETAILS** RELATED

**Reservation Information**

Reservation Name R-000133	Contact Yasin Sheik
Reservation Type <span>1</span> Booking Reservation Type	Status <span>1</span> Cancellation Requested <span>5</span>
Resource <span>1</span> Swan Valley	Accept T & Cs <input checked="" type="checkbox"/>
View the Terms & Conditions <span>1</span> <a href="https://scoutswa.com.au/">https://scoutswa.com.au/</a>	Booking Amount 40.00
Total Attendees 0	Deposit Required <input checked="" type="checkbox"/>
Base Price <span>1</span>	Deposit Amount 20.00
	Balance amount 20.00

Create a Booking Head Office

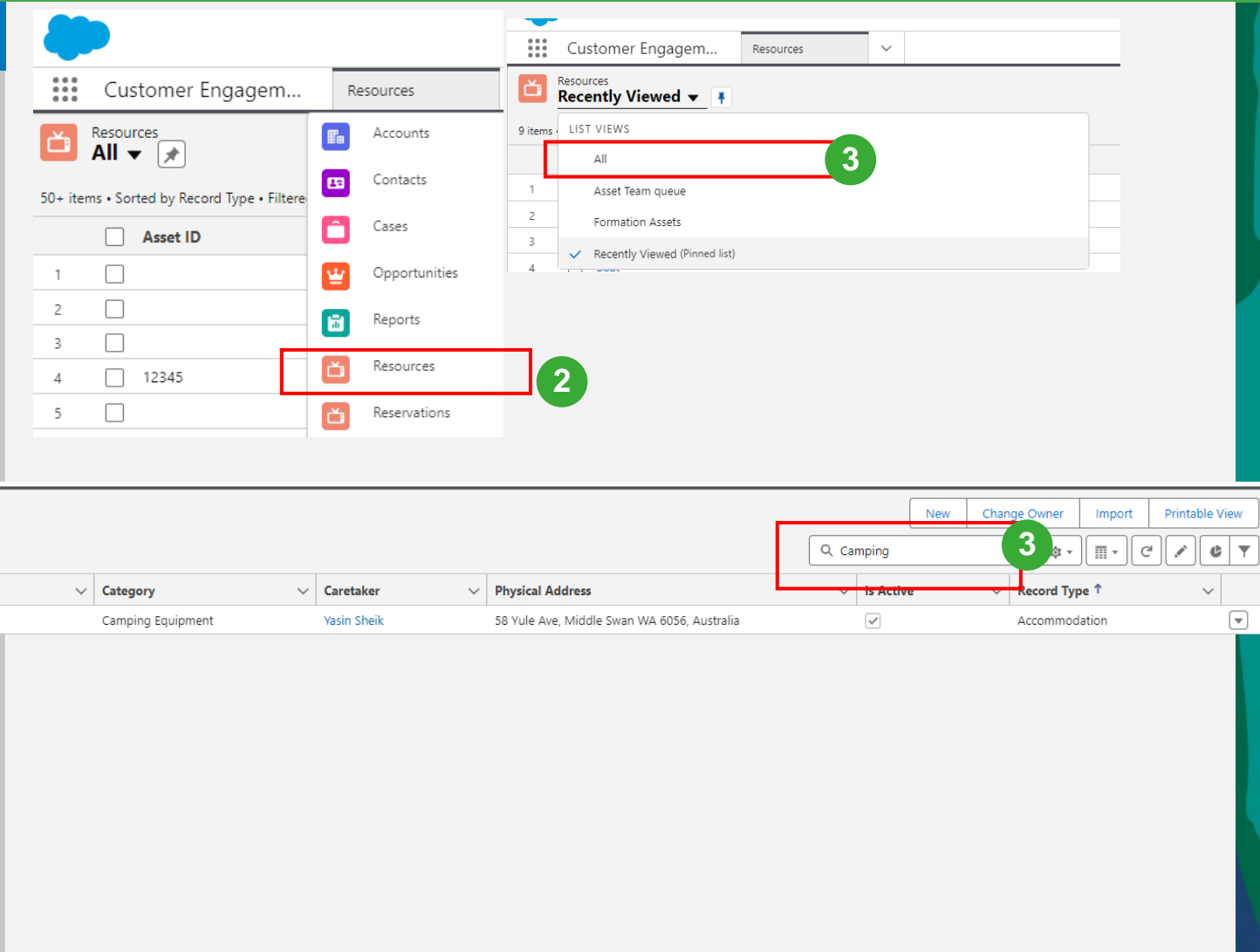


# Create new Booking

## Head office



- 1 Log on to Salesforce
- 2 Go to Resources Tab
  - Select all List view
- 3 Search for the accommodation you want to book



The screenshot shows the Salesforce interface for the 'Resources' tab. The left sidebar contains a navigation menu with 'Resources' highlighted. The main content area shows a list of resources with columns for 'Asset ID', 'Resource Name', 'Category', 'Caretaker', 'Physical Address', 'Is Active', and 'Record Type'. A search bar at the top right contains the text 'Camping'. A red box highlights the search bar, and a green circle with the number '3' is placed next to it. Another red box highlights the 'Resources' tab in the sidebar, and a green circle with the number '2' is placed next to it. A third red box highlights the 'All' list view option in the 'Recently Viewed' dropdown, and a green circle with the number '3' is placed next to it.

Asset ID	Resource Name	Category	Caretaker	Physical Address	Is Active	Record Type
12345	Camping Hut 1	Camping Equipment	Yasin Sheik	58 Yule Ave, Middle Swan WA 6056, Australia	<input checked="" type="checkbox"/>	Accommodation



# Create new Booking

## Head office



- 1 Go to Calendar tab
- 2 Select Month & Week as desired
- 3 Double click on the required slot

- Update the details

Note:

- 4 To create any booking a Contact is mandatory

If the contact is not available, you will have to create a new contact, Please reach out to member services for creating a contact

Details Related **Calendar** Occurrence Bookings Maintenance

Camping Hut 1

Today 1 Mar 2024 March 2024 Day Week Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27 Jennith A Hover me! For more information	28	29 <b>[Empty Slot]</b>	March 1	2

Booking Reservation Type Validated

**Double booking checking is disabled because you have the Allow Double Booking permission assigned.**

**Start (local time)**  
 Date: 1 Mar 2024 Time: 12:00 am  
**End (local time)**  
 Date: 2 Mar 2024 Time: 12:00 am

Details

Resource: Camping Hut 1

No of Youths

Male:  Female:

No of Adults

Male:  Female:

Booking Details

Total Attendees:  Status: Submitted

*This field is calculated upon save*