

How to handle a make-up session in ClientConnect

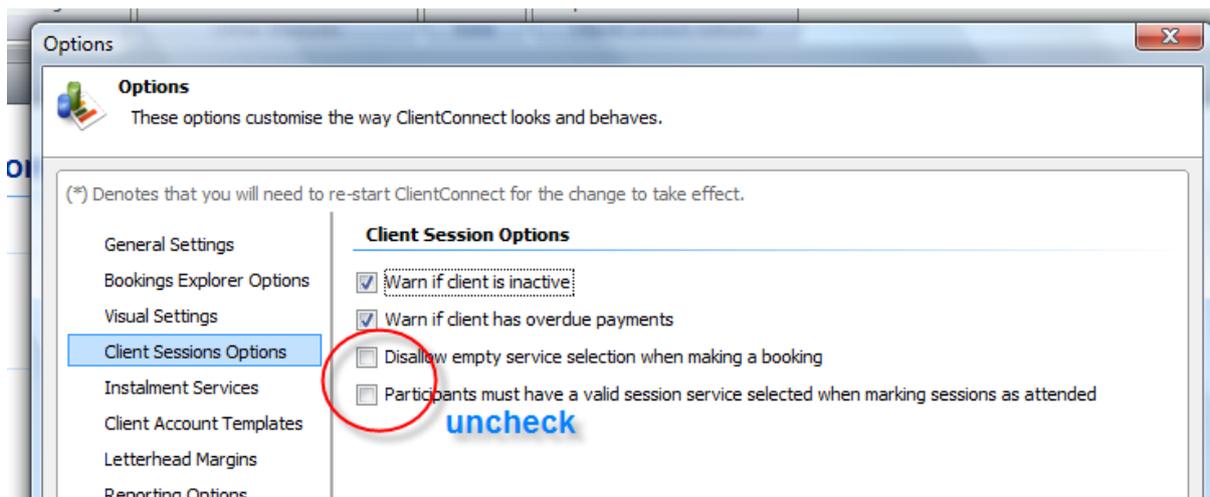
If a client is flagged as a “No show” or a “Late Cancel”, ClientConnect deducts a session from their Package. If it is your policy to offer a **free** makeup session, then the correct way to put this through the system is to create a special “Make-up” Booking Type and use this for the make-up session. This is preferable to adjusting the number of sessions on the client’s current package, as this may run the risk of double counting the number of sessions for which a trainer is paid.

The recommended process is as follows:

1. **Change Client Sessions Options.**

Go to Application Menu then Control Panel > ClientConnect Options.

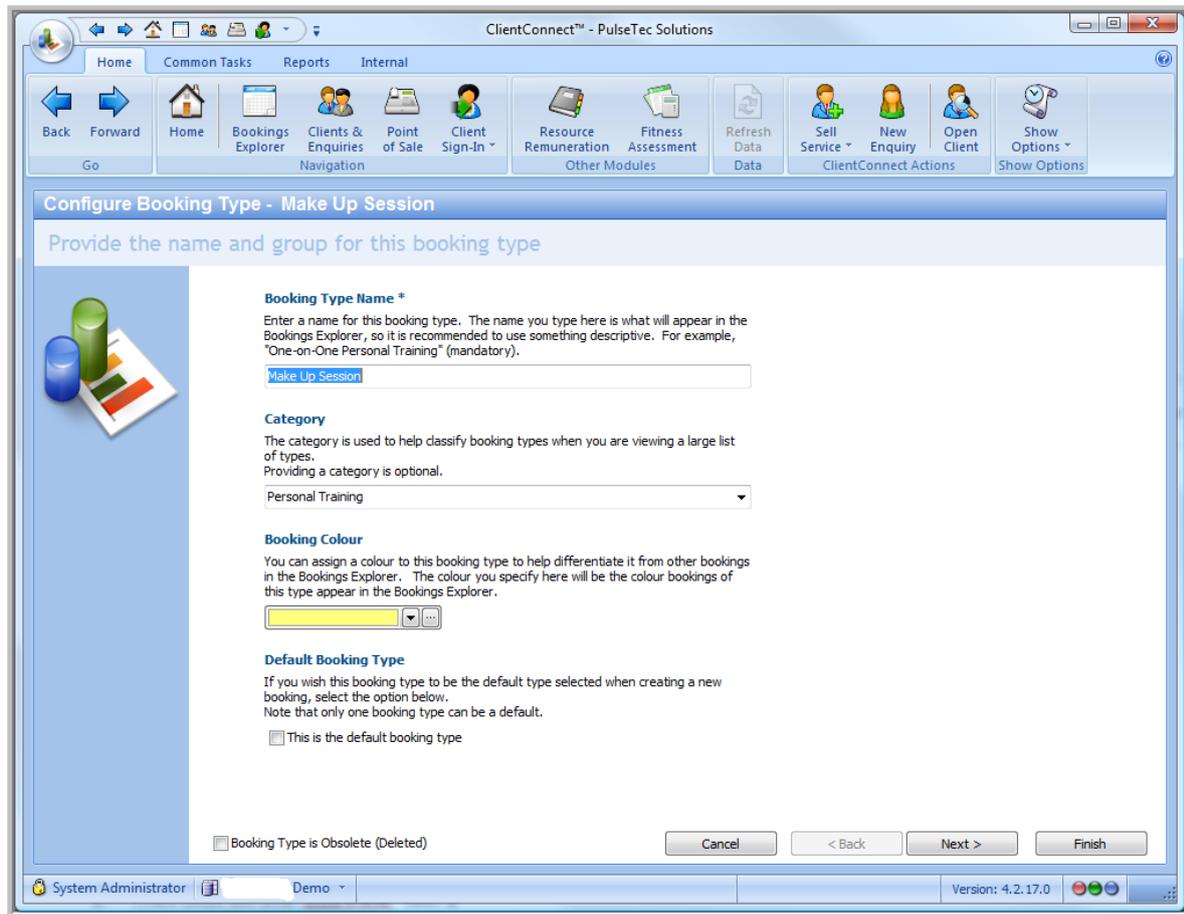
Under Client Sessions Options ensure that the last two boxes are unchecked.



2. **Setup the Make-up Booking Type.**

This is the same as the setup of a regular booking type except for one extra setting.

- a. Create the Booking Type by clicking on Application Menu → Control Panel → Manage Booking Types. Enter the name of the Booking Type such as “Make-up Session”.



- b. Click Next.
Complete the relevant details regarding maximum participants, time periods etc.

Do not link any services or packages to this Booking Type.

Do not include this Booking Type in Remuneration.

Tick the box “Allow clients to attend without a package” (see screenshot below). Be sure to Save all these changes.

Configure Booking Type - Make Up Session

Provide other details for this booking type



Booking Reminders
You can have new bookings of this type automatically have a reminder set.

Turn on reminder by default

Reminder Type:

Client Attendances
If you want to allow clients to attend bookings of this type without having to consume a session from a package, tick this option.

Allow clients to attend without a package
(Warning: checking this box overrides the settings in 'Client Sessions' (in the Options screen) for this Booking Type)

You can specify how many sessions to deduct from a client's service package each time they attend a booking. Normally, this is simply set to one (1), however you can set a different value here if required.

Deduct: sessions from the client's package each attendance

3. Update the Status of the original Booking.

Go to Bookings Explorer and mark off the “No Show” or “Late Cancel” as normal. (This method does not apply if the original booking is being marked as “Cancelled”).

4. Add the Make-up booking.

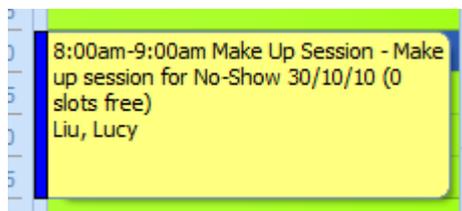
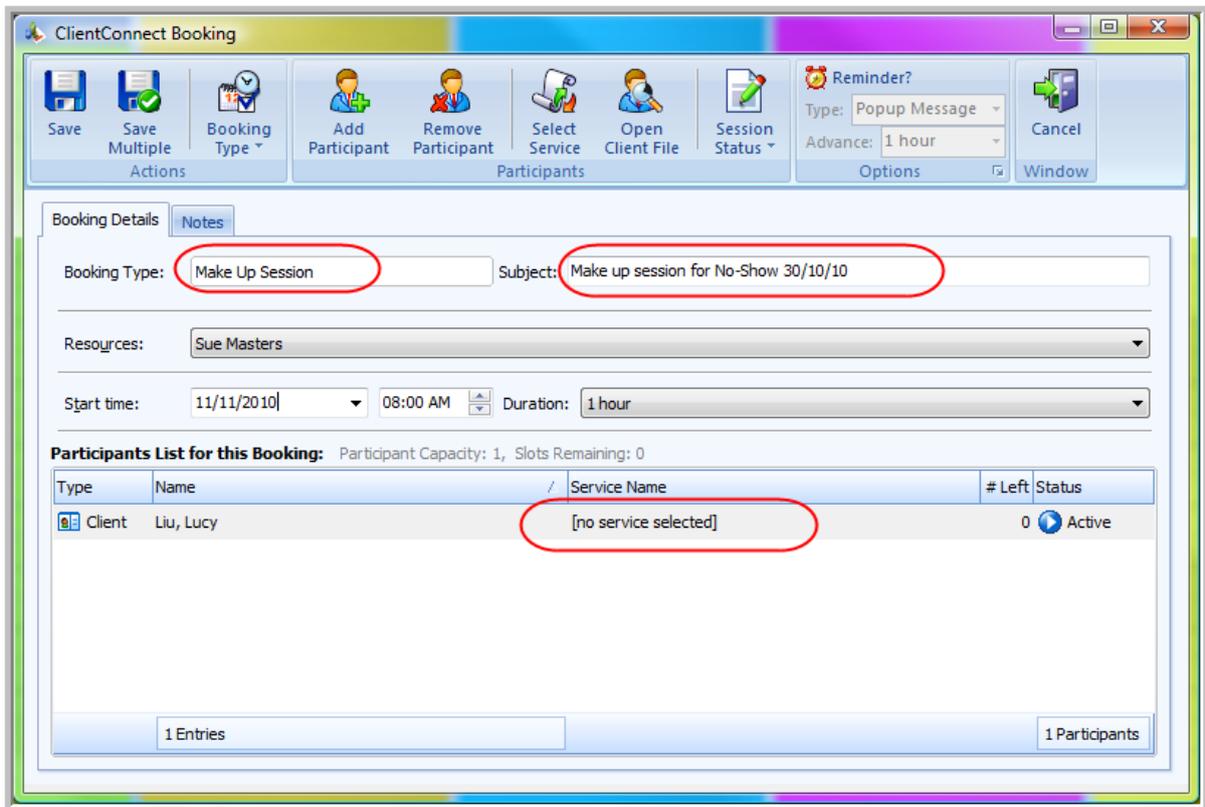
Add the new Make-up booking.

Add the client as a participant but do not select a service. i.e. Select “Proceed Without Service”.

Optionally you can enter a reason such as “Make-up session for No show 30/10/10” in the Subject field of the booking or in the Notes tab.

Save the booking and when the client attends the booking mark it off as “Attended”.

When the booking is made correctly, it should appear as below.



5. Calculating Trainer Pays.

When you view your Resource Remuneration, you will see that this booking has been excluded from the calculation. (When setting up the Booking Type, you should have selected to exclude from Remuneration calculations).

Therefore, the client has been given their free Make Up Session, but the trainer has only been paid for one session.

Last updated: July 2011