Elite Live
User Guide
V1 2018

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1.0 Introduction

More and more people look to the internet to make purchases at their convenience. Elite Live is an evolution of our previous booking system that offers much more to the members of your club. Elite Live is a central hub for all members and visitors allowing them to book activities, top up or view their levy account, view club messages and communicate with other members. The functionality is fully responsive to PC, Tablet and phone views.

This document is your guide to the new functionality and has been designed to allow you to familiarise yourself with the Elite Live product and can be used to train your teams.

<div style="border:1px solid black;">

How to get the most from your Internet Booking Engine!

In order to get the most from your Internet Bookings facility, it is important to advertise the service to your customers and/or visitors.

Only by spending time and effort in getting your customers to use the service will generate a return on investment to your business.

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2.0 Accessing Your Elite Live Portal/Registration

Once you have been supplied with the URL you will need to add this to your website. Once this is added, Elite Live will recognise any customers attempting to access the portal from your website and redirect them to you dedicated Elite Live portal.

2.1 Authentication Page

The Authentication page will allow existing members and visitors to log in with a username and password which they have created. This is also where both members and visitors will register a username and password by selecting 'Click To Register'

Also users will be able to recover their lost passwords by selecting 'FORGOTTEN MY DETAILS'
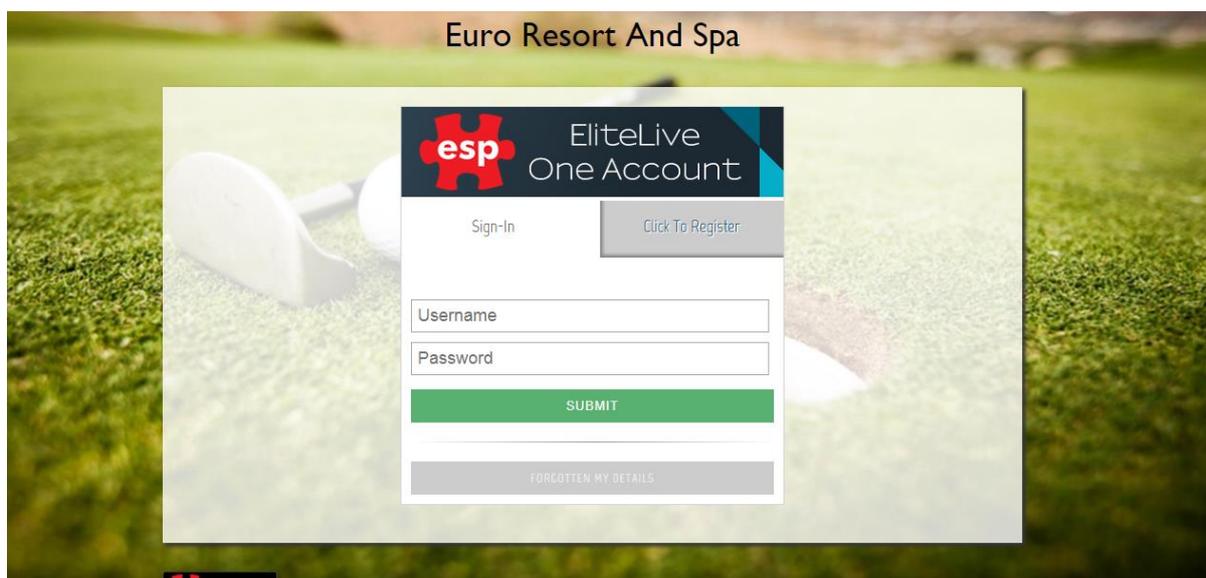
2.2 Registration as a Visitor

By selecting 'Click To Register' on the previous page, this will allow both members and visitors to register a username and password which they will use to log into the site to make bookings etc. Username must be at least 6 characters made up of letters and numbers only. Password must be at least 6 characters.

Select the tick box if you are a current member at the venue/ club and have received your authorisation details by email.
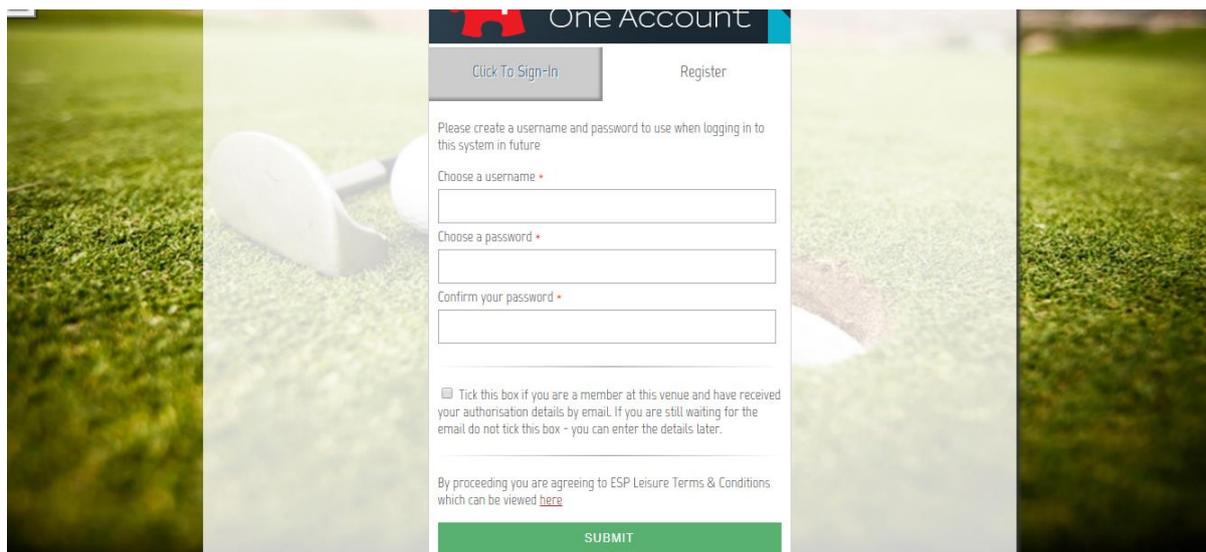
The following page will be displayed after entering a username and password and selecting 'Submit' – where the visitor will be able to populate their personal details.
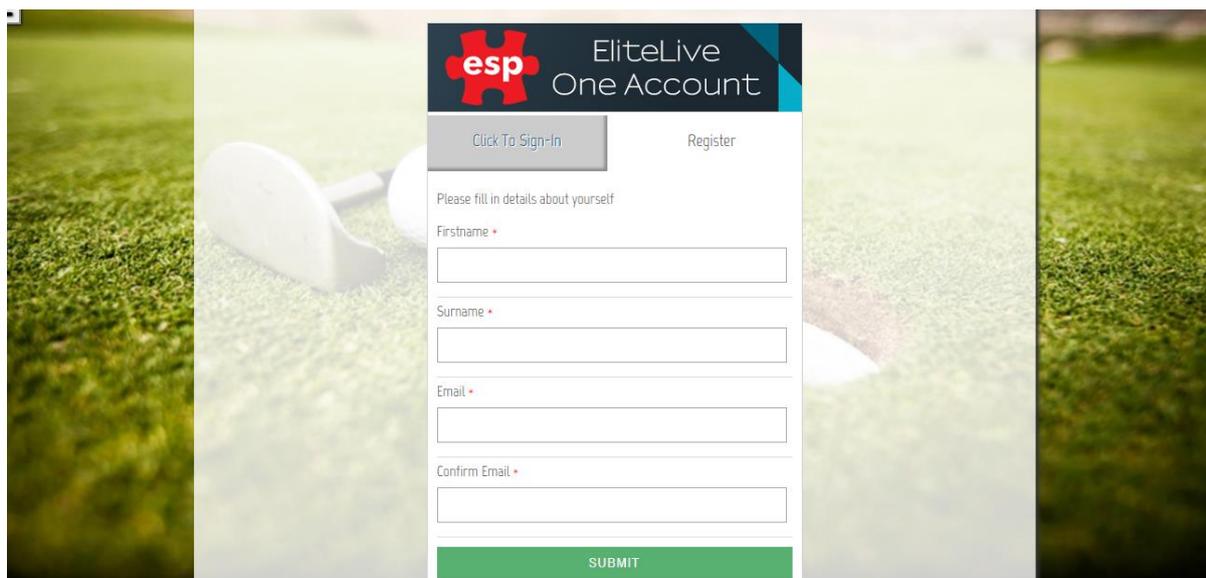
Finally after the personal details have been entered, the visitor has now registered and can make bookings. They can log in using their username and password in the future.
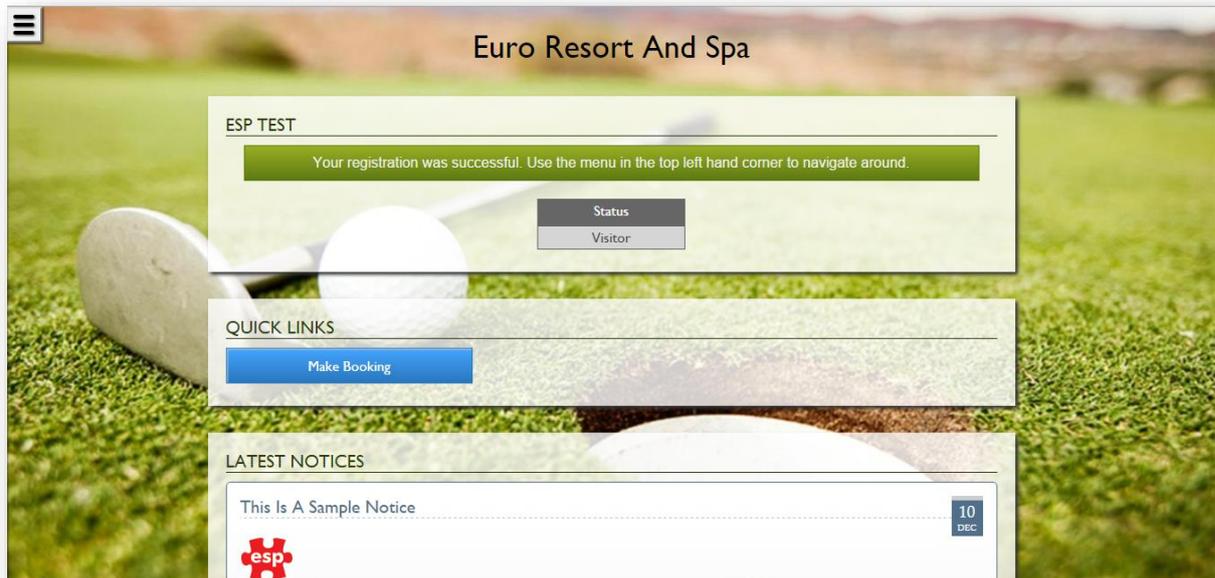

2.3 Registration as a Member

By selecting 'If you have not yet registered please click here' on the previous page seen in 2.2 Registration, this will allow both members and visitors to register a username and password which they will use to log into the site to make bookings etc. Username must be at least 6 characters made up of letters and numbers only. Password must be at least 6 characters.

The tick box must be ticked to allow members to enter their Validation Name & Password received in an e-mail.
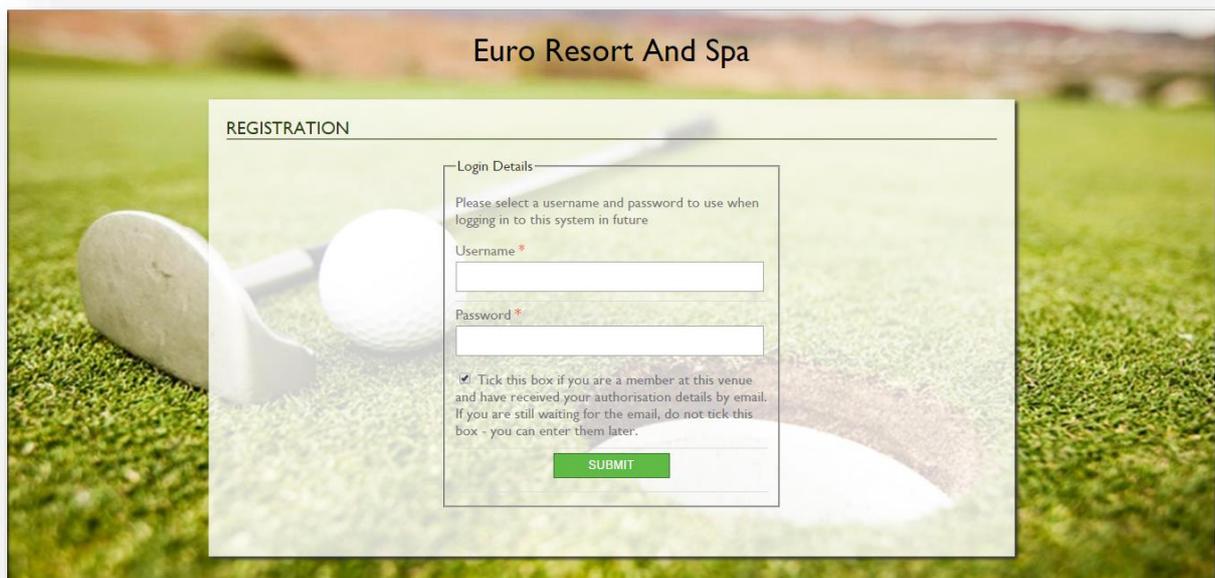
A verification e-mail from the club will include the member's unique membership authentication details which will need to be entered below. This will link the member's username with their ESP Customer Address.   Verification emails are sent for individual members via the F7 Action option from within the members' record in Elite.

If the Validation details are left blank, the registration will continue to the 'Your Details' page as a visitor registration.

Following the Verification Page, the member will be logged into their online portal where they will be able make bookings / change details / etc.…

2.4 Lost Username

If you receive a request from a member who has lost their username, these are the steps required for them to be provided their username. Please note this will only apply for Elite Live users who have already verified and linked their details as a member against their elite record.

1:   Resend the Verification Details
- If a member has lost their username you can resend the registration email manually from the member record on Elite, to do this go to the customer record and press F3 to accept it, double check the email address, press F7 Action
- This will bring up the action list, and select Register with Internet Site

- Select Regist
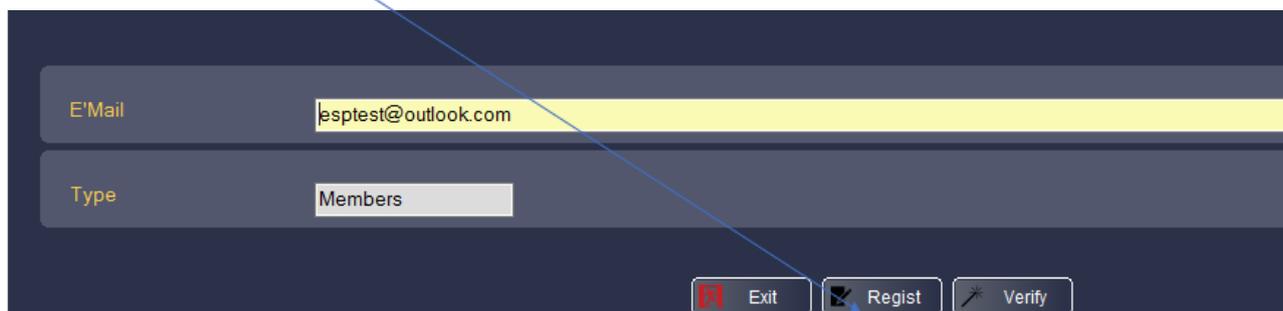
Answer Yes to Are you Sure you want to register this member This will manually send them the registration email

- The member will then receive an email with the verification details used to link their record.

  Ask the member to check spam/junk filters in the event they have not received the email, in case it is caught in the providers filter.

2:    **Request the lost username**
  • Once the member has received the verification email, they must then go to their elite live log in page and click on **Forgotten my details**
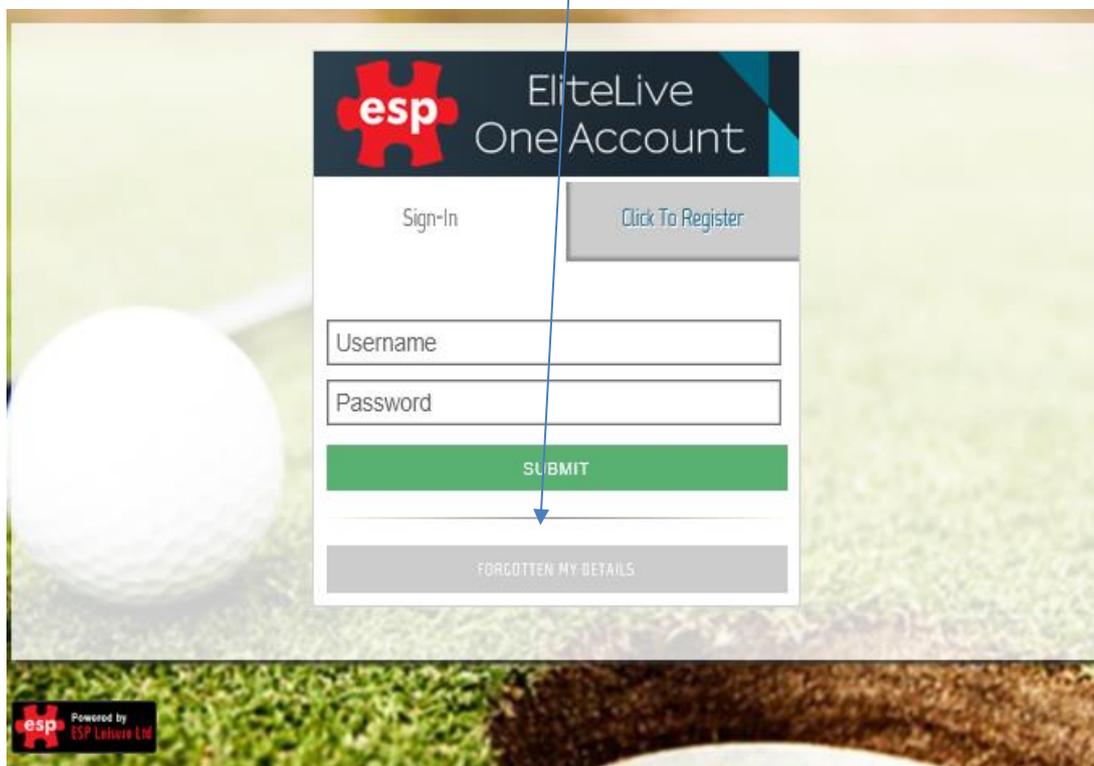
  • This will take you to **Forgotten my details, click on Lost Username**
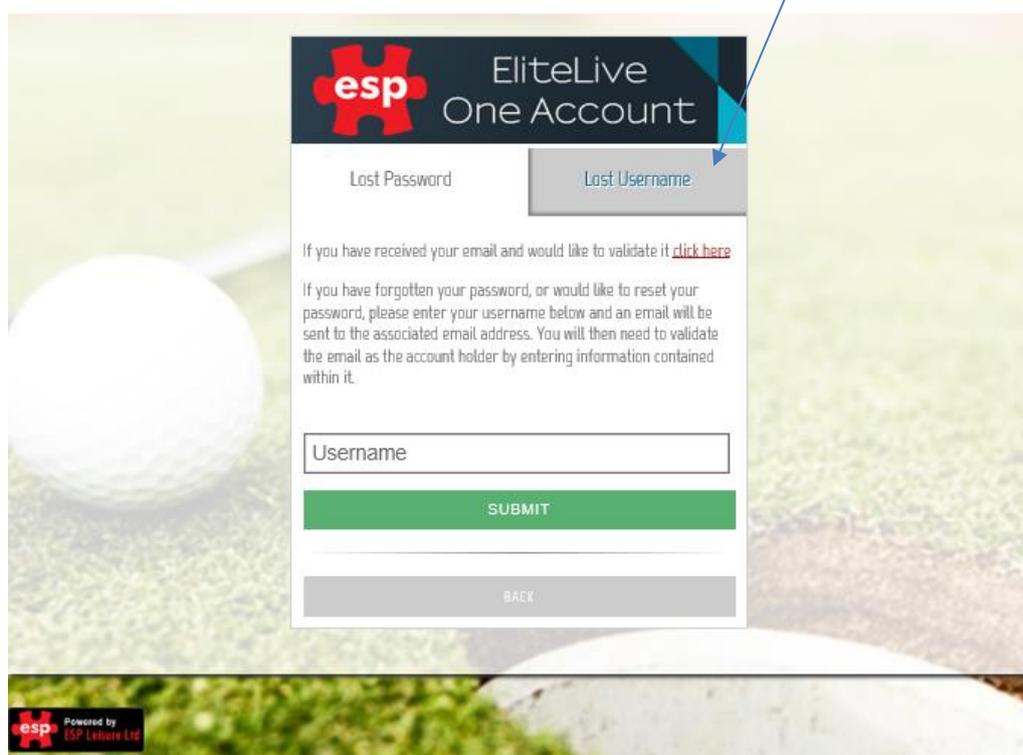
3: **Entering your Verification Name & Code details**
- From here this will take you to Lost Username screen
- You can then enter the Verification Name & Code provided in the verification email and press **validate**
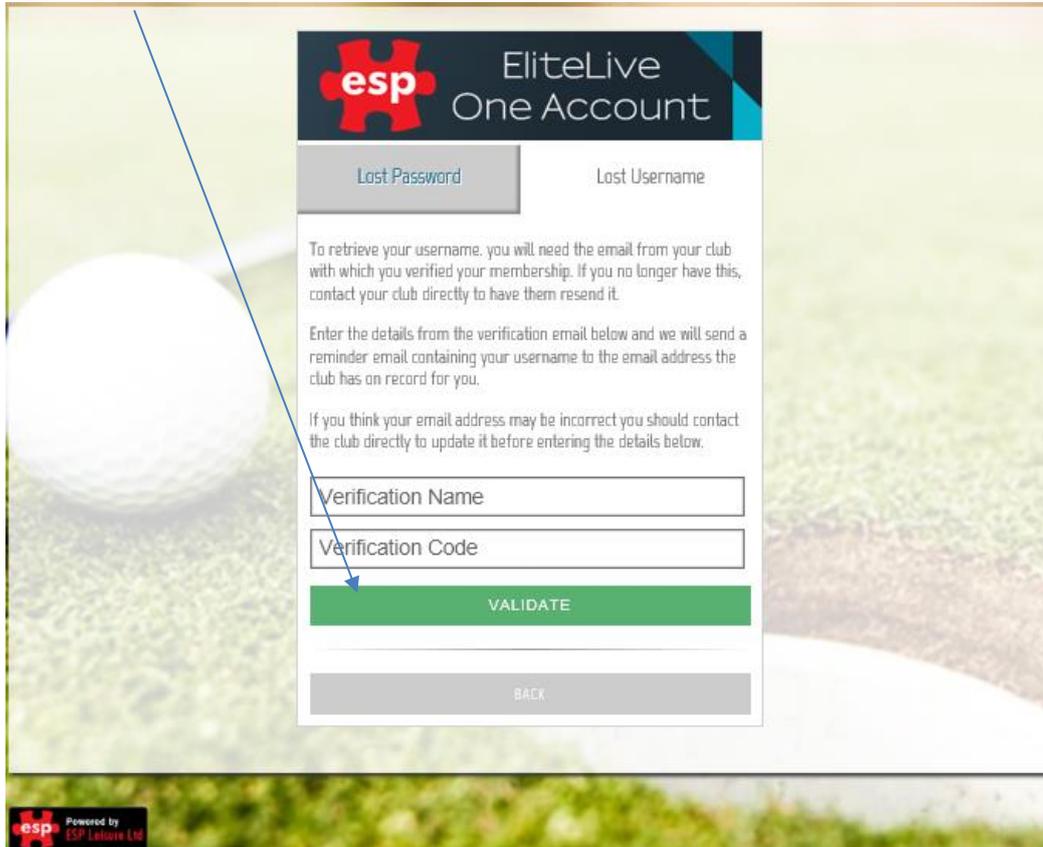
- The following message will appear
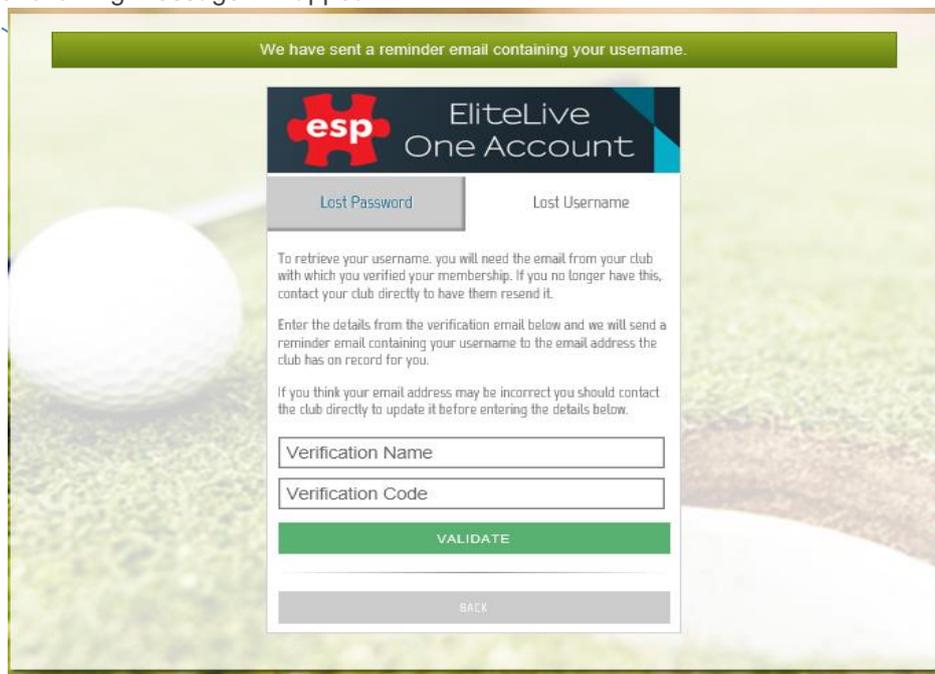
- You will then be sent an email with your username, which you can use to log in

- If you have also forgotten your password, once you have received your username you can use the Lost Password routine to reset your password

2.5 Lost Password

If you receive a request from a member who has lost their password, these are the steps required for them to reset their password. Please note this will only apply for Elite Live users who have already know their elite live user name.

Request forgotten password

1:      If a member has forgotten their password, they must then go to their elite live log in page and click on **Forgotten my details**
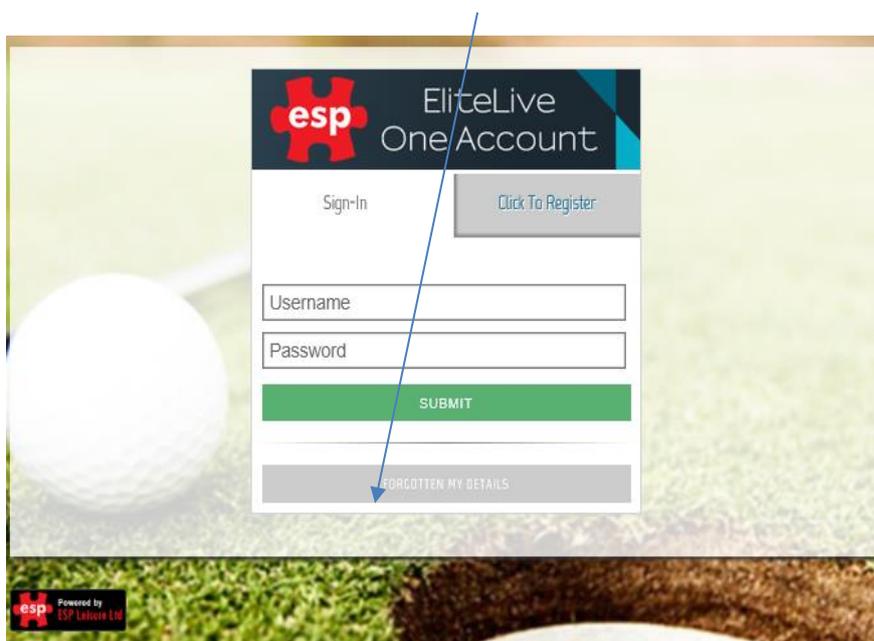
2:   This will take you to **Forgotten my details, Lost Password**
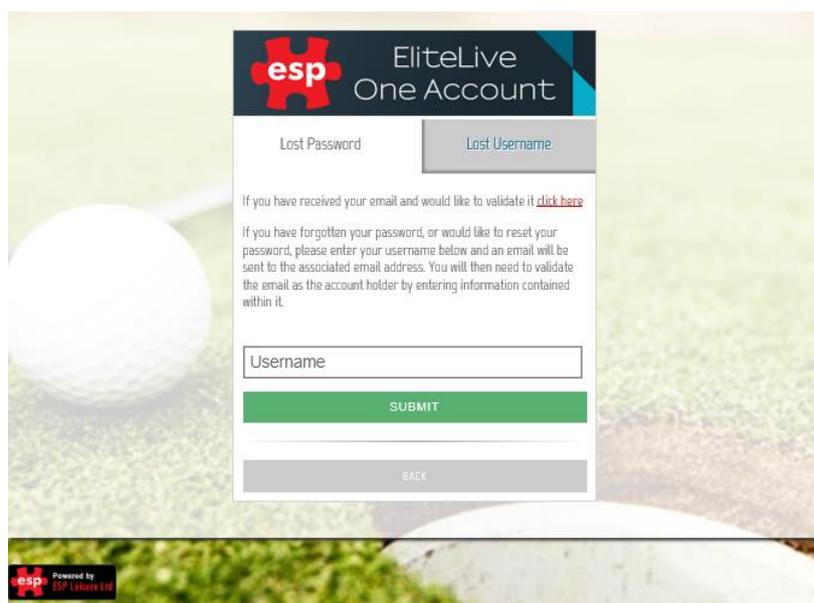
3:     **Enter your Username and Press Submit**
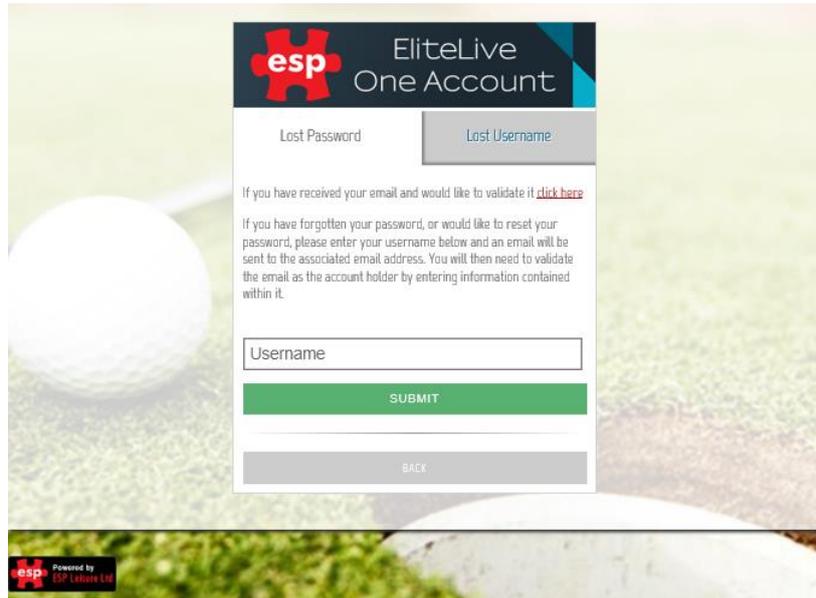
This will generate an email to the be sent to the email registered to the account (make sure you check your spam and junk filters)
Within the email will include:
- Email Unique Code
- Email Random Word

4:     **Creating a New Password**
Enter this information in the fields below and create a new password and press Submit
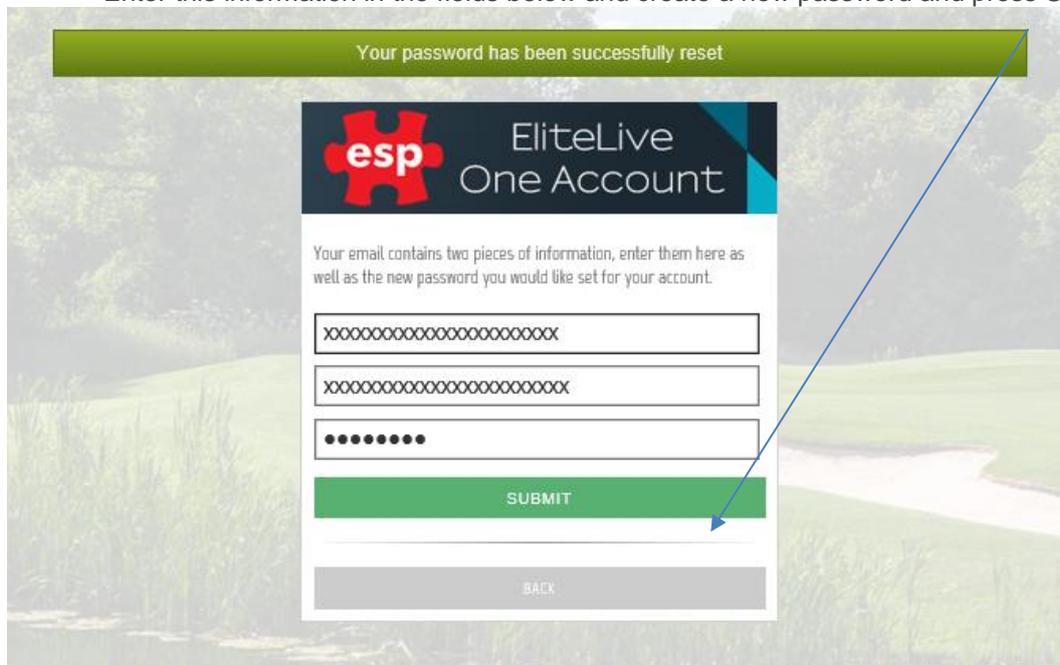
3.0 Elite Live Navigation/Making a Booking

Once the customer is logged into Elite Live they will see the Home Page. The below image shows the various options that may be presented when logging in. The options available will vary dependent on the requirements agreed prior to implementation.

Quick Links – Added to save members time when completing tasks with Elite Live (bookings and top ups)

Member to Member Messaging- Any new messages sent to the member will appear here.
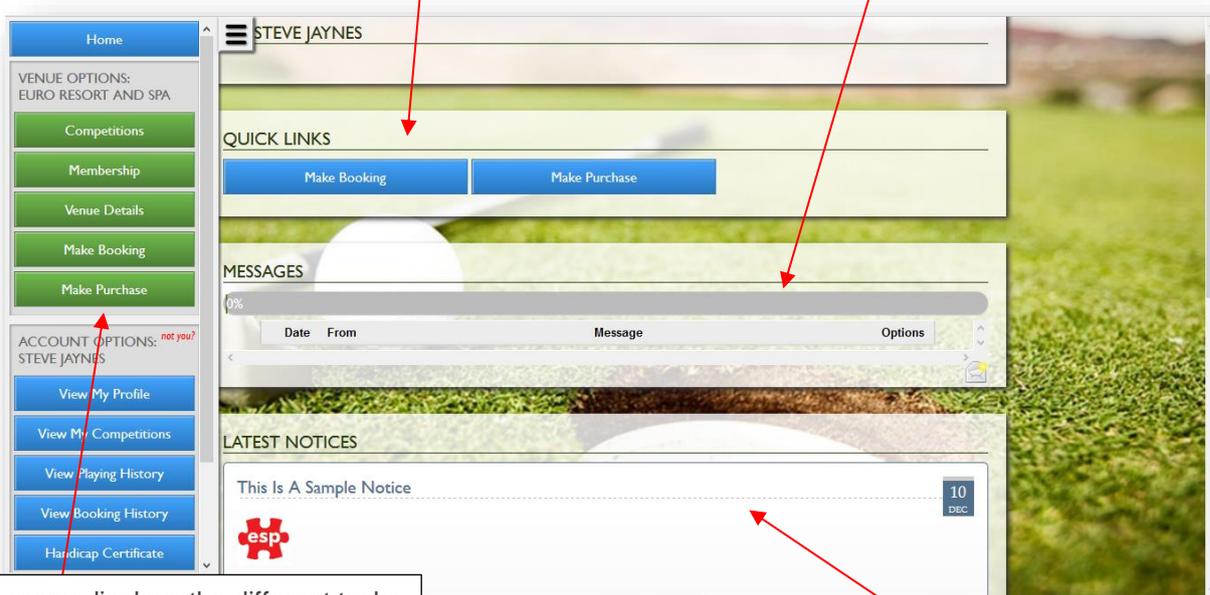
Menu – This menu displays the different tasks that can be completed by the customer such as make a booking, view their profile or logout. The options available to view will vary for members and visitors. This menu can be expanded or collapsed by clicking on the square icon at the top on the menu taskbar.

Latest Notices – This is where any club notices will be displayed to your members or visitors.

3.1 Make Booking as a Visitor

Once a visitor is registered as per 2.2 above, they will be able to make a booking by either selecting 'Make Booking' on the Quick Links or via the Menu Option on the left side of the screen by pressing the menu icon.
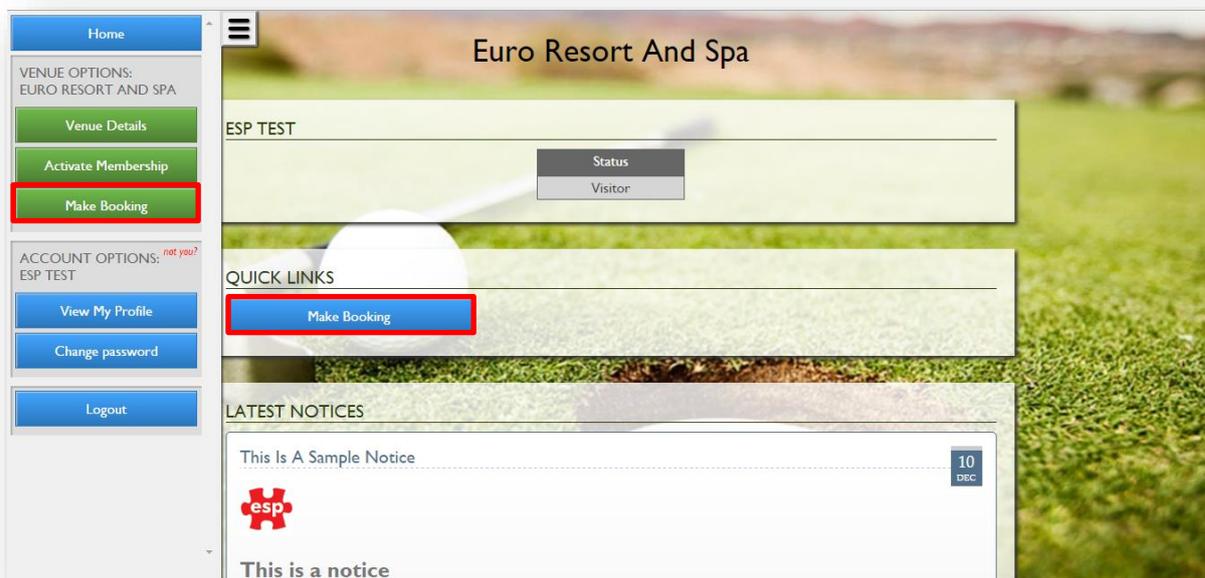
The following screen will be displayed if you have multiple groups of activities configured to be available online.
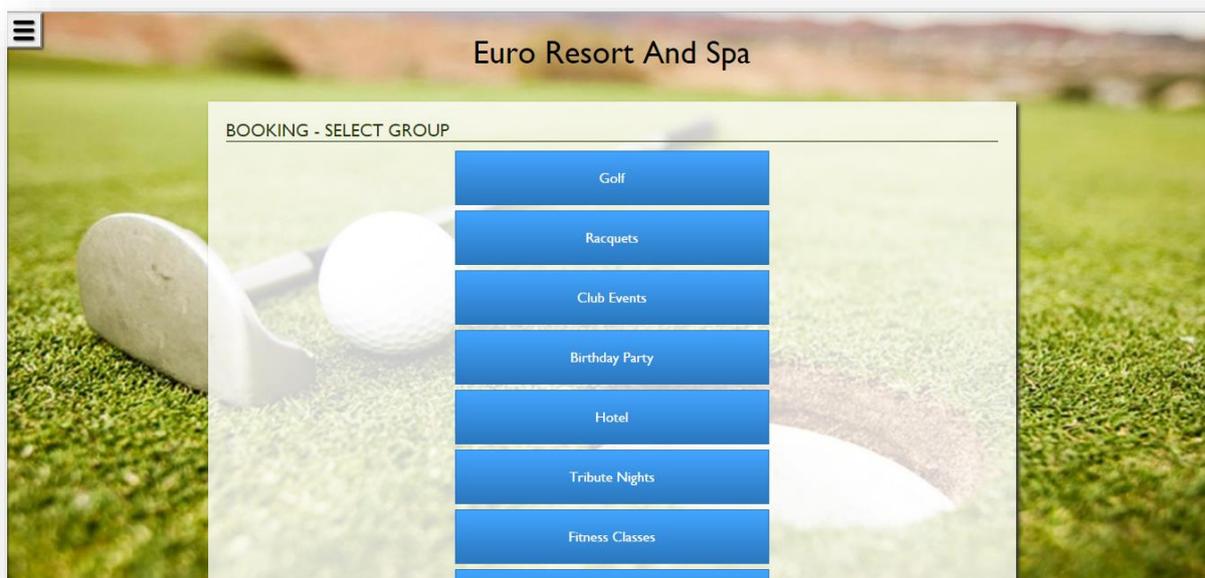
This will then lead to the list of activities which are available within the group selected. If you are able to book for more than 1 person, you will be given an option to select the number of participants.

You will also be shown the calendar for the number of days availability which is being exported for this activity for a Visitor booking.

Any dates highlighted in Green have times available to book. Dates in Grey do not have any times available.

Once a date is selected to play, the times available and prices will be displayed.

Time for bookable activities will either be shown in 30 minute time-bands or as individual slot times. Once a time band has been selected, the user is may be prompted for a Booking Questionnaire – such as 'Buggy required' where the user can also book a buggy with their booking.

If no questionnaires are available, they will be directed to the following 'Check Details and Payment' screen.

The payment details can then be added to the bottom of the screen, shown below.
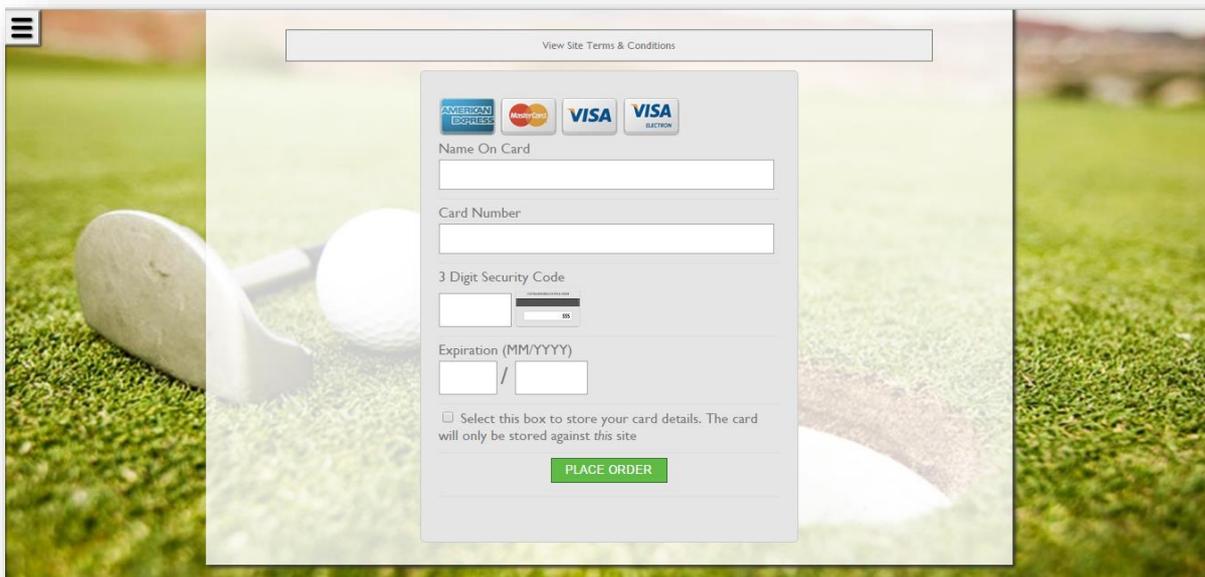
Once you select Place Order/Make Booking, the portal will connect the ESP Live Server to the Application Server, where it will make the booking. The following screen will then be displayed to confirm the details of the booking.
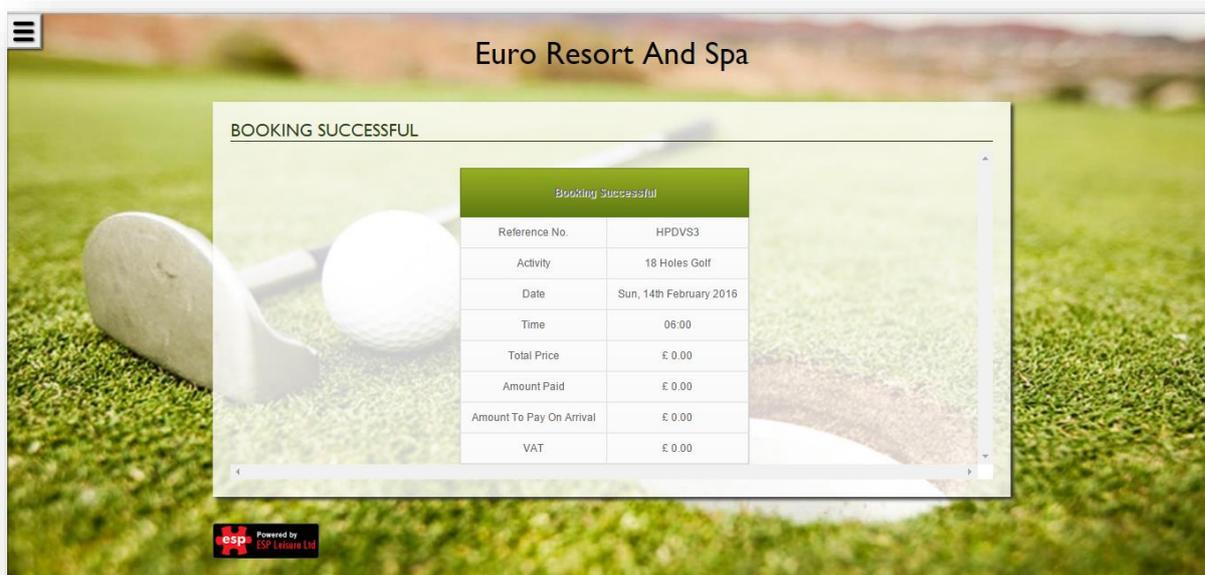

An e-mail confirmation will also be received by the Visitor on completion of the booking.

3.2 Make a Booking as a Registered Club Member

The first screen which a member will see is shown below. They should login with the credentials that they created when completing the initial registration process as shown in 2.3.
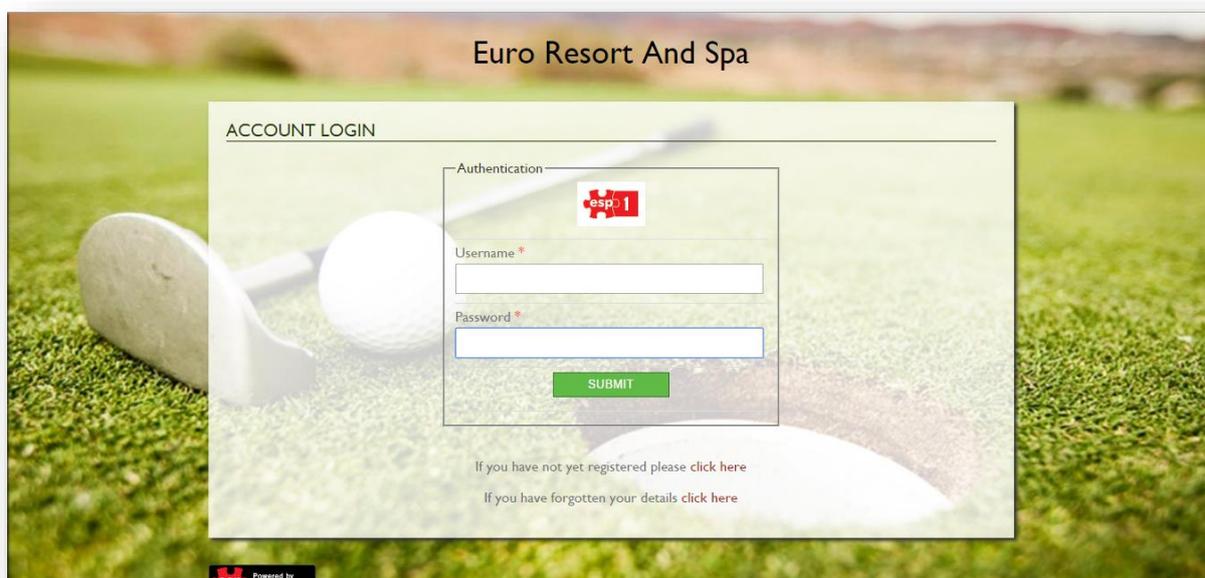
Once they have selected 'Submit' the following screen will be displayed.

The member will be able to make a booking by either selecting 'Make Booking' on the Quick Links or via the Menu Option on the left side of the screen by pressing the menu icon.
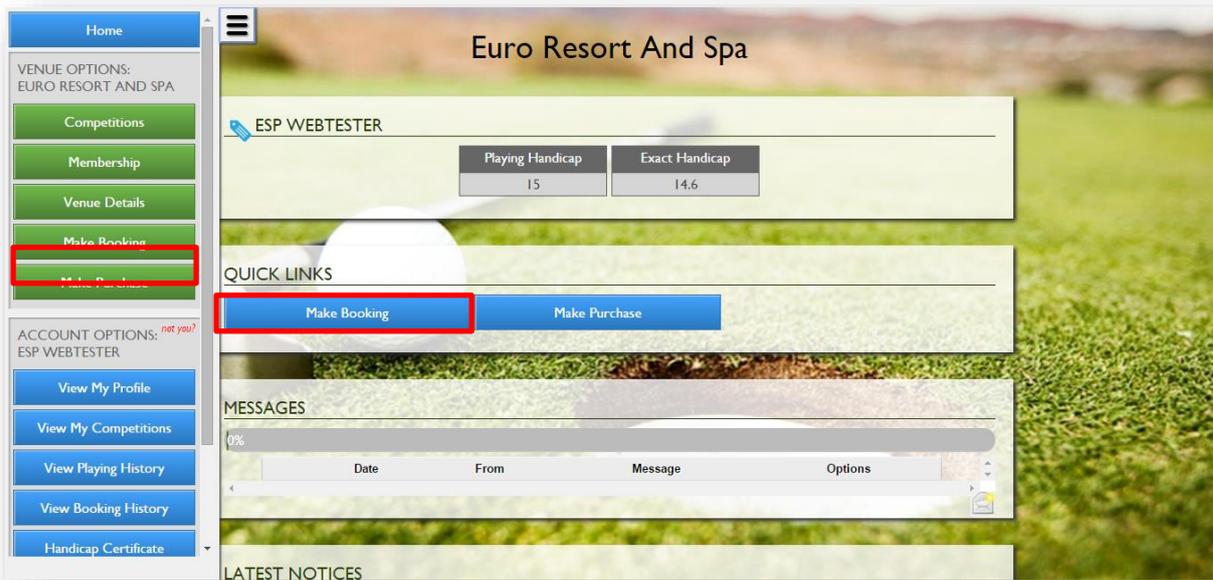
The following screen will be displayed if you have multiple groups of activities configured to be available online.
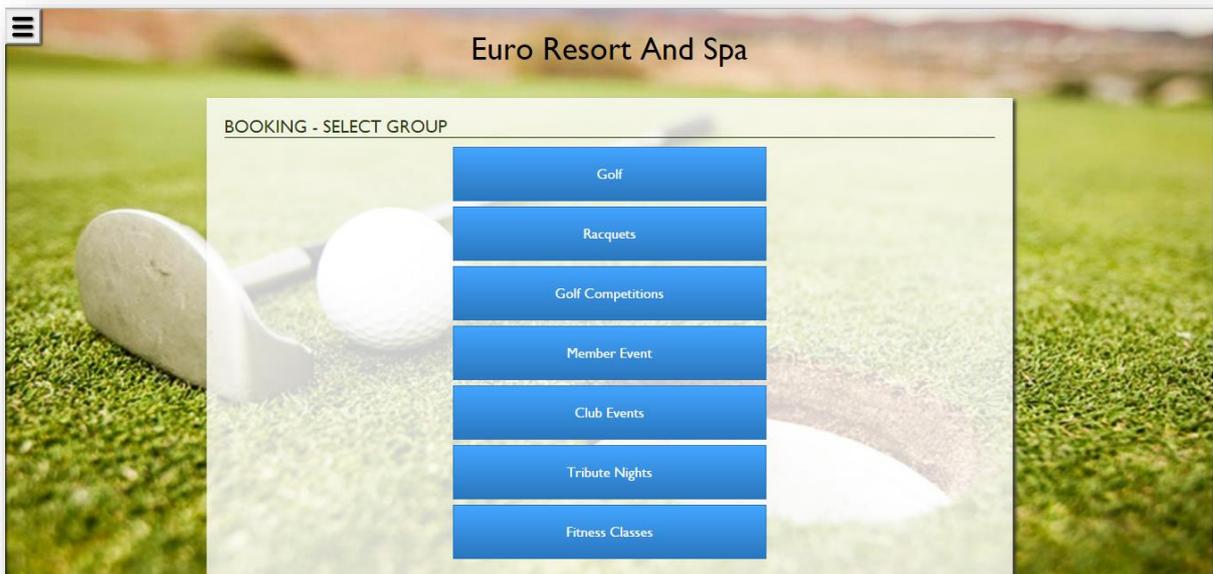
Once you have selected an activity, if you are able to book for more than 1 person, the following screen will be displayed to enter additional participant details.

3.2.1 Members Search

If the additional participants are members, the person making the booking should begin typing the surname of the additional member(s) into the text box. A list of any members who have allowed their name to be searchable will appear as shown below.

<u>Visitors will not be able to view any names online when making a booking.</u>
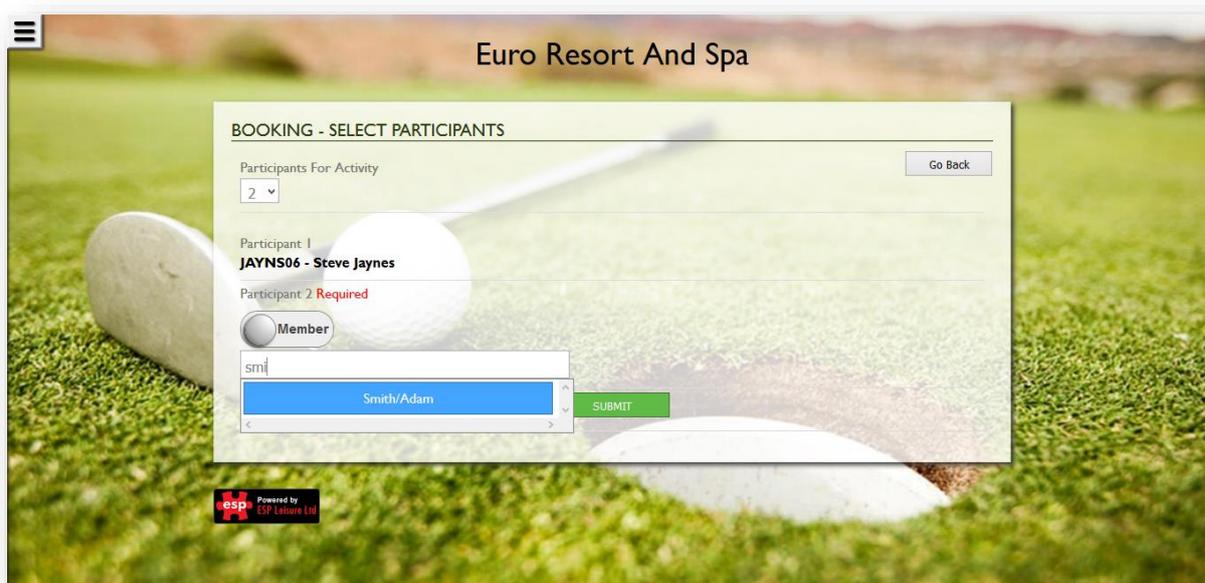
Q: How can members appear online?

As part of the initial set up, it is standard to make all member names not visable online to other members. However should a member wish their name to appear online for other members to view, this can also be done by the member on Elite Live by ticking the Opt In box (see below) located on the View My Profile under Available Opt-Ins.
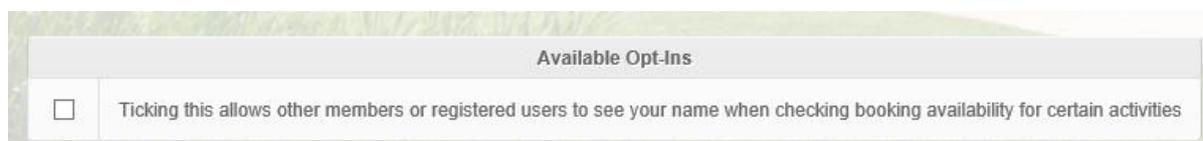
This will then lead to the list of activities which are available within the group selected. You will now be shown the calendar for the number of days availability which is being exported for this activity for a Member booking.

Any dates highlighted in Green have times available to book. Dates in Grey do not have any times available.
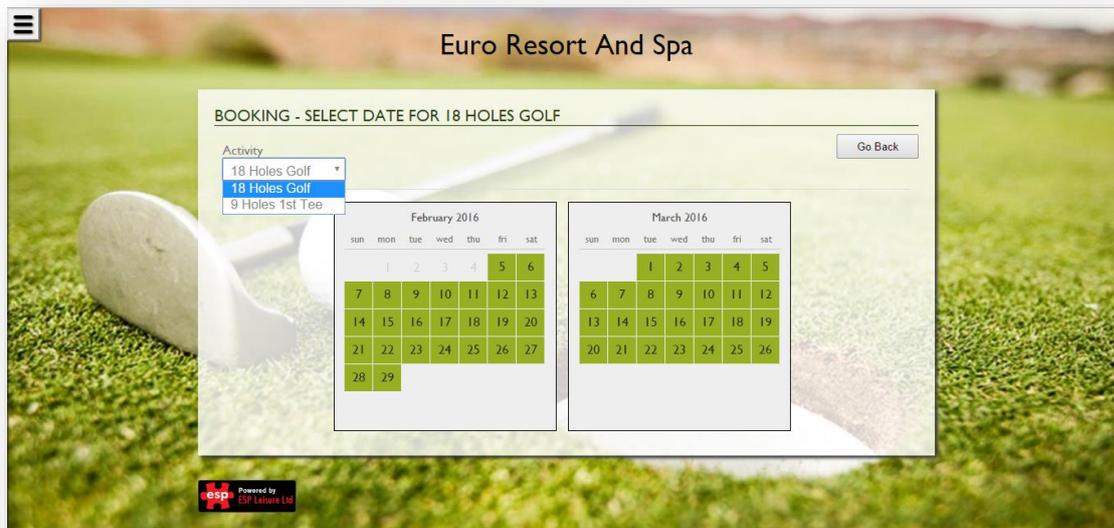
Once a required date is selected, the times available and prices will be displayed.

If available, other member's details will be displayed per booking slot if 'Web Private' is unticked within their customer record in ESP Elite.

Time for bookable activities will either be shown in 30 minute time-bands or as individual slot times
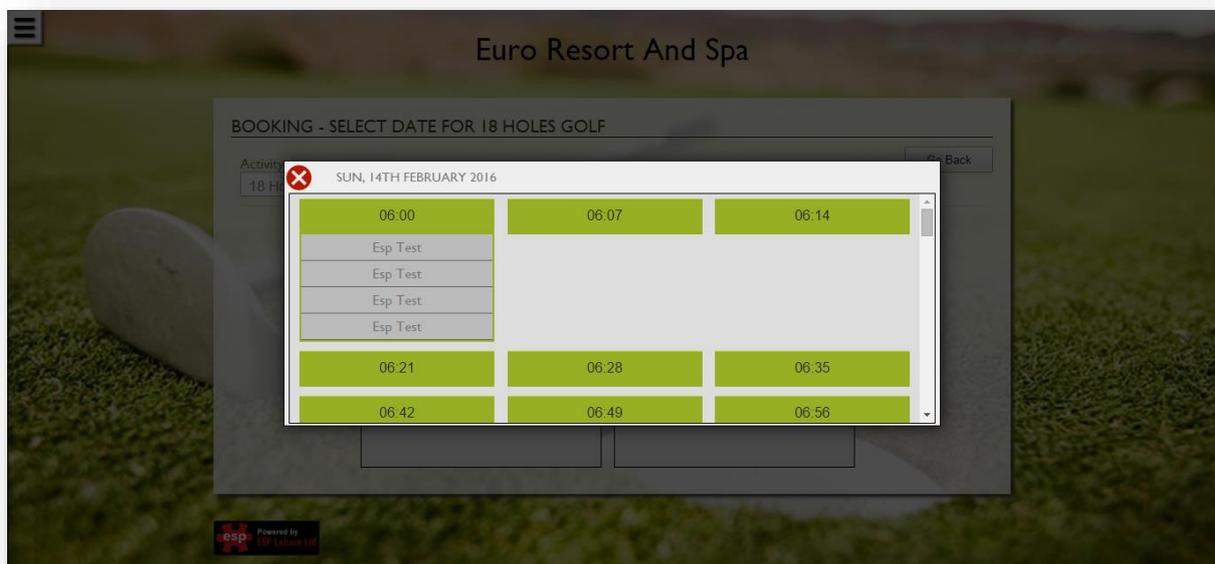
Once a time band has been selected, the user may be prompted for a Booking Questionnaire – such as 'Buggy required' where the user can also book a buggy with their booking.

If no questionnaires are available, they will be directed to the following 'Check Details and Payment' screen.
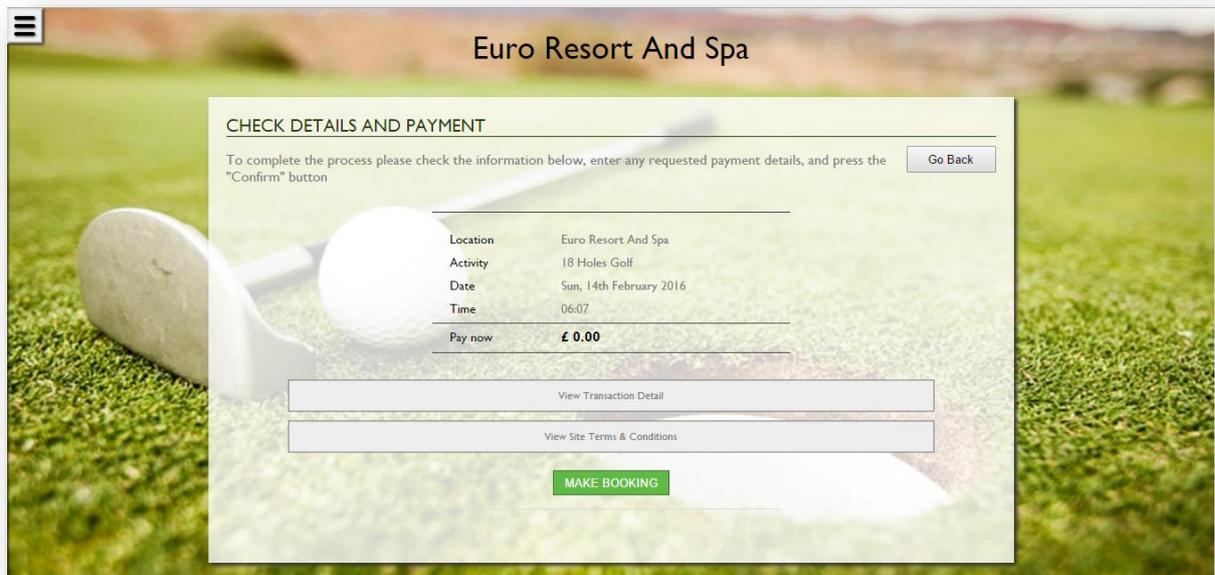
If there are charges for the Member's Guests or supplementary items, which you wish to be processed at the time of booking, these charges will be requested now and before the booking can be completed a payment will be required and this credit card transaction will be processed through the ESP Live Server. Payments can be configured to be requested either at the time that the booking was made or on arrival to the club. This requirement will have been specified in your requirements form.

Once you have selected Make Booking, the portal will connect the ESP Live Server to the Application Server, where it will make the booking. The following screen will then be displayed to confirm the details of the booking.
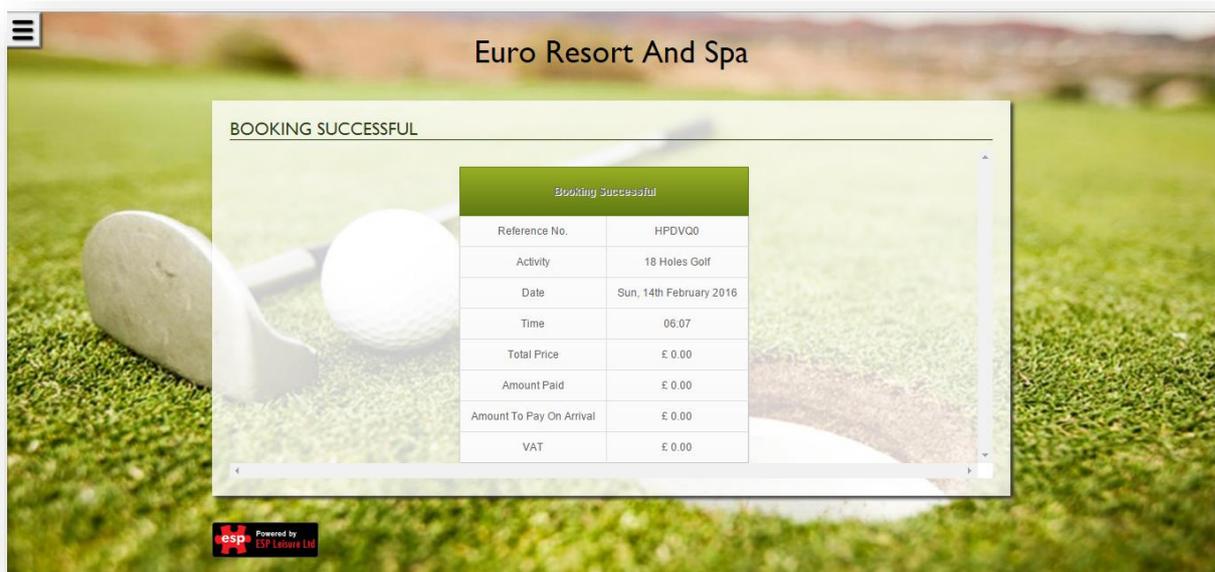
An e-mail confirmation will also be received by additional Member's on completion of the booking.

4.0 Topping up a Levy Account & Viewing a Statement

The Elite Live portal now allows members to both top up their Levy account to use at the club as well as view their existing balance from anywhere they like. **Please note: The members portal will be amended to request payment at the time of booking for all activities if you wish to offer levy top ups.**

To top up a levy account:

Select 'Make Purchase' from either the Quick Links menu on from the Menu task bar.
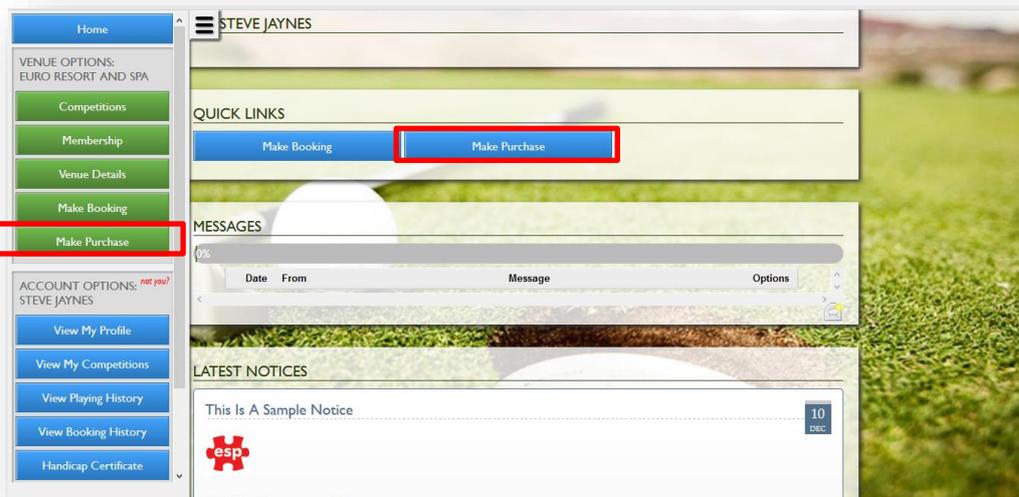
Then select the required top up denomination

After selecting one of the various Levy Top Up amounts shown above; the member will be directed to the Check Detail and Payment page shown below where they can complete their Levy Top Up.

When 'Place Order' is selected, they will be presented with a confirmation page which will also e-mail the member a confirmation of their Levy Top Up purchase.
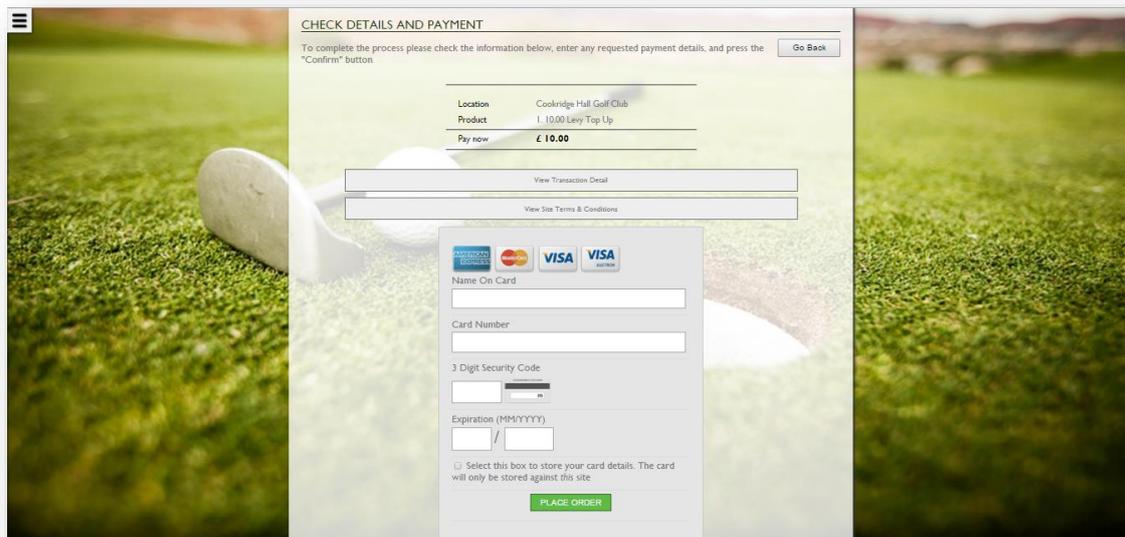
4.1 Viewing a Levy Statement

Select Make a Purchase from either the Quick Links or the Menu taskbar.
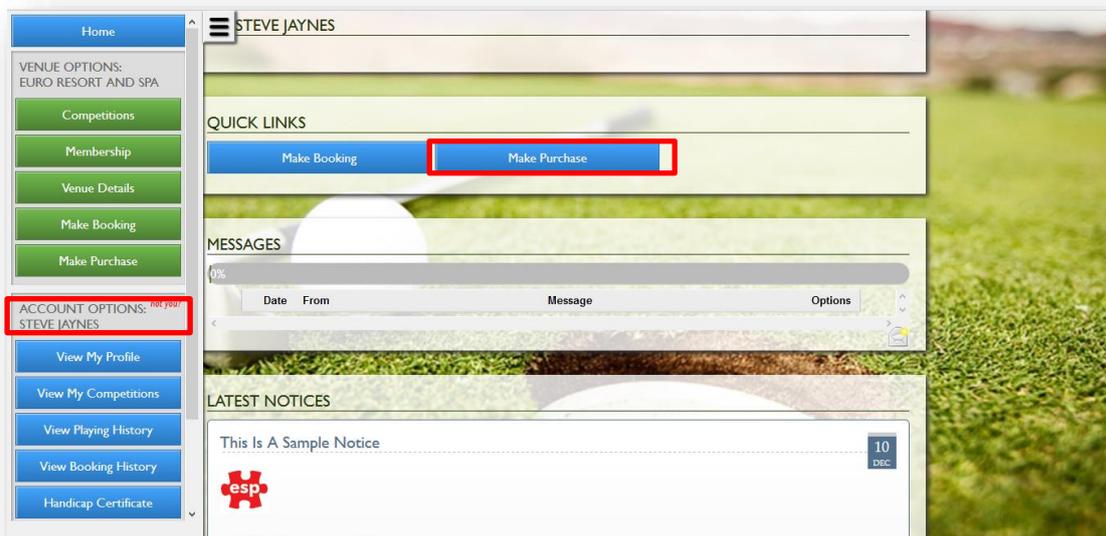
Click on the 'Click Here to View' option located underneath each top up denomination.

A levy statement will now be displayed showing all top ups, expenditure and remaining balance.
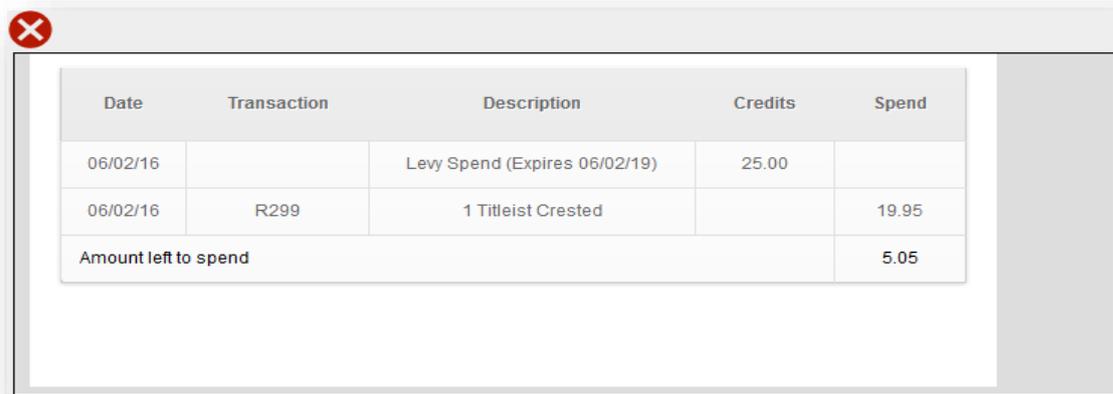
Date	Transaction	Description	Credits	Spend
06/02/16		Levy Spend (Expires 06/02/19)	25.00	
06/02/16	R299	1 Titleist Crested		19.95
Amount left to spend				5.05

5.0 Cancelling a Booking Online

Elite Live offers to option for members to cancel forthcoming bookings online providing they wish to cancel the booking within the time frame(s) specified in the requirements. Any booking that has a charge attached to it may not be cancelled online and the customer will need to call/email to club to cancel. Only bookings made online after the functionality has been implemented will have the option to cancel.

To cancel a booking:

Select 'View Booking History' from the menu on the left of the homepage.
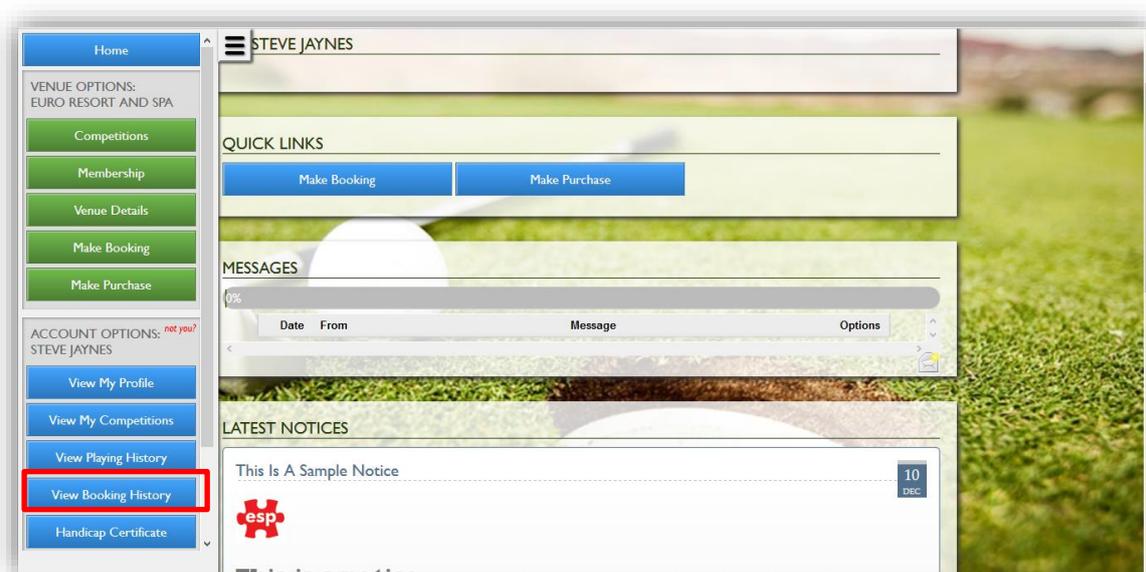
A full breakdown of bookings will be displayed on the next page. All bookings that are in line with the club cancellation policy set against the activity AND have no charges against them will show a 'Canel Booking' option against it. This option will not appear for any bookings that do not meet the criteria above. Members wishing to cancel bookings that fall outside the cancellation policy will have to contact the club directly.
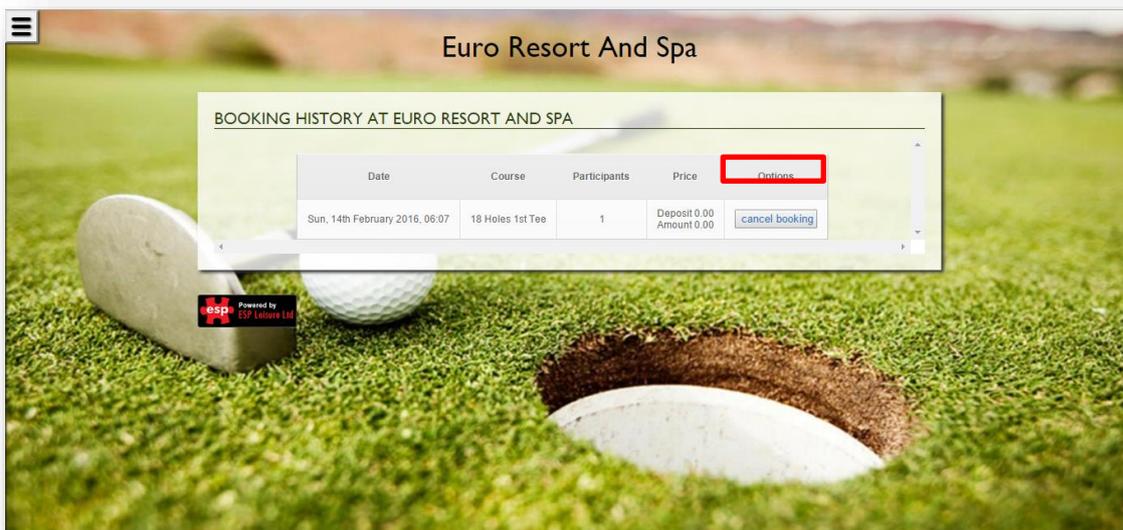
6.0 Member to Member Messaging

Members have the option to send messages to fellow club members via the Elite Live portal which allows for easier and quicker communication between members regarding bookings and competitions.

**To create a new message:**

Click on the message icon at the bottom of the Messages tile
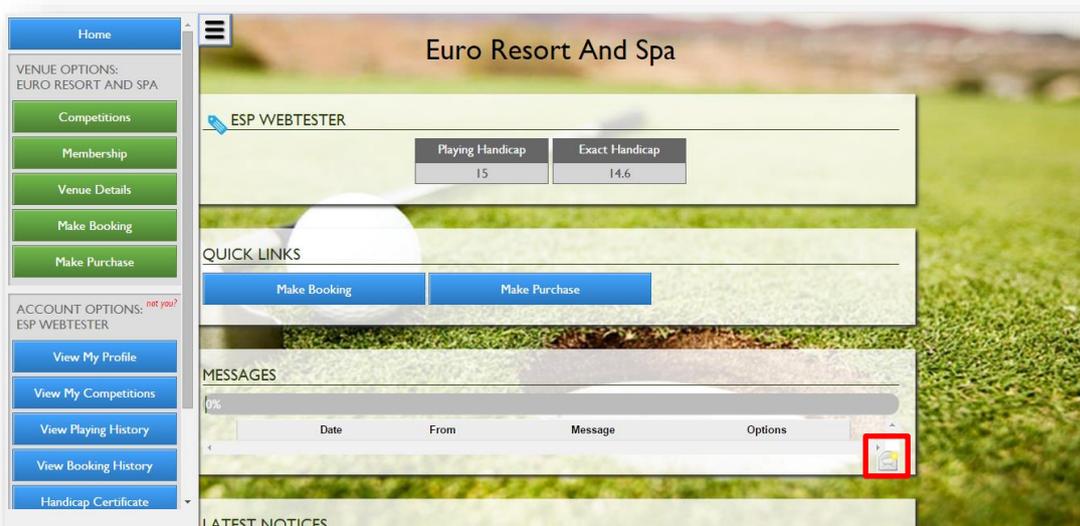
Select the member that you wish to message from the drop down box and type your message in the text box below this. There are a maximum of 150 characters.
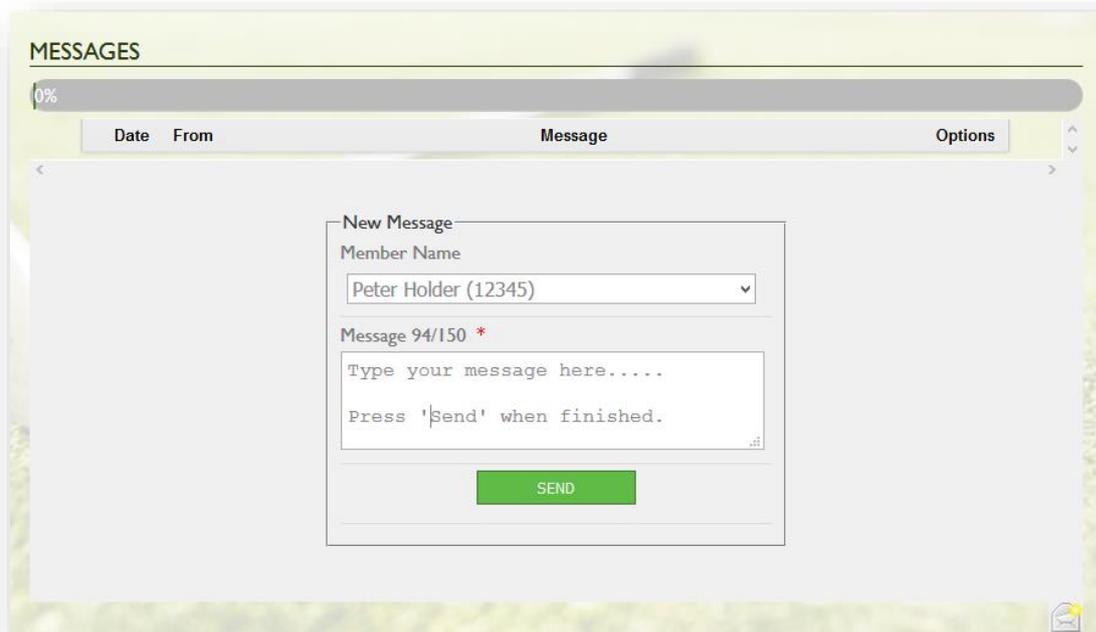
Press send when the message is complete and a message sent confirmation will appear onscreen and you will be returned to the home page.

7.0 Club Notices

It is now possible to display member and customer wide notices at a click of button. This piece of functionality is useful in allowing the club to reach out to the customer population without the hassle of collecting email addresses or phone numbers as well as reducing the cost of sending promotional literature out by post. This is a great tool that can be used to get notices out to all e.g. course closure or important information or to actively promote forthcoming events at the club.

To be able to access this functionailty you need to be set as an Admin on Elite Lite by ESP as part of the set up. If you have requested this, a member of the team will set up the required access. Please note: This access is based on the staff member having already a operator set in user configuration & Elite record, and linked Elite Live record with Member status

The notice board image upload is designed for images, so can support, JPG, PNG, JFIF, keep the size below 1MB (make sure there are no spaces in file name)

It does not support doc, .pdf or .xls, if you needed to you could link files to a URL

7.1 Adding a notice

Scroll down to the latest notices section of the Elite Live homepage
Select the 'view all notices' option at the bottom of the tile:
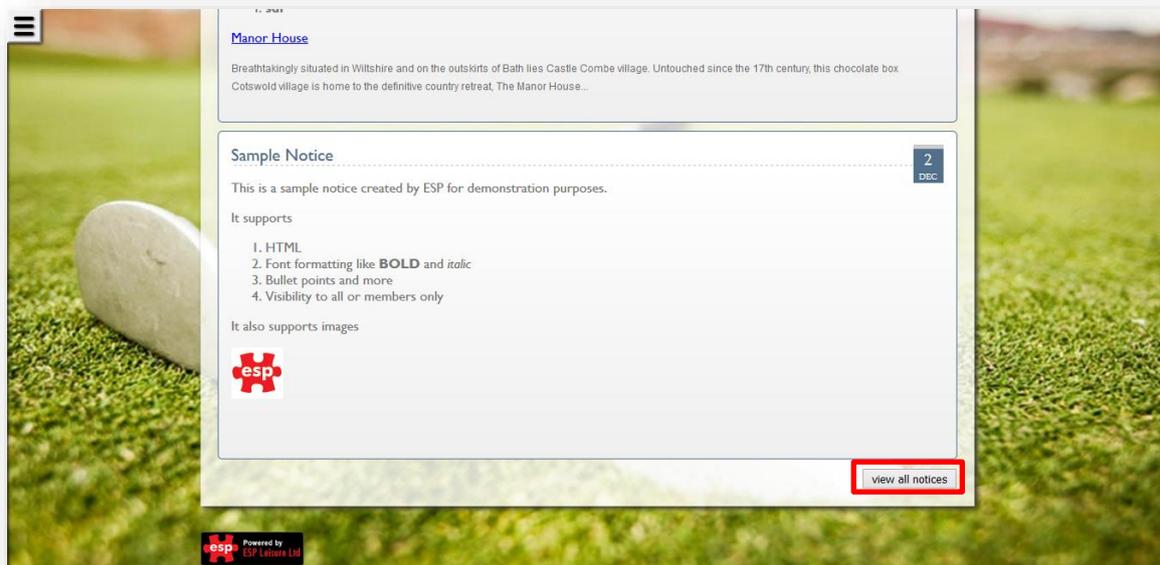
Select the menu icon on the RIGHT hand side of the webpage the click on 'Add New Notice'.
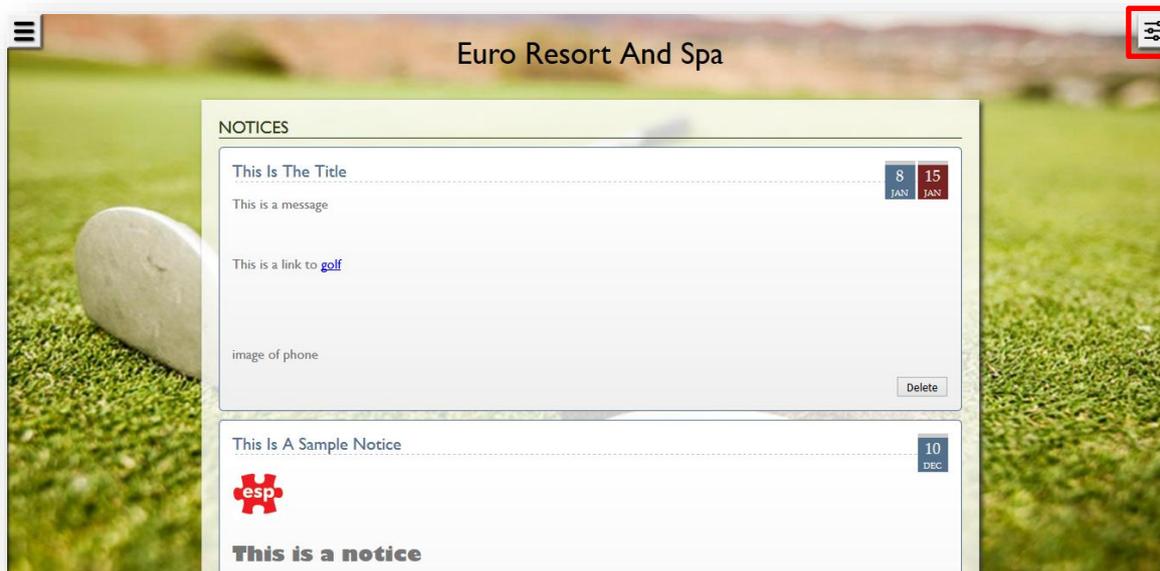
**Start and End Date** – Specify when the message will display from and to. If it is a permanent message, tick the 'No End Date' check box

Visibility – This determines which group of customers see the message. Select one of the two options 'everyone' will display the message to all customers 'Members only' will display the message to members of the club

Euro Resort And

NOTICES

This Is The Title   8 JAN 15 JAN

This is a message

This is a link to golf

image of phone

Delete

This Is A Sample Notice   10 DEC

esp

This is a notice
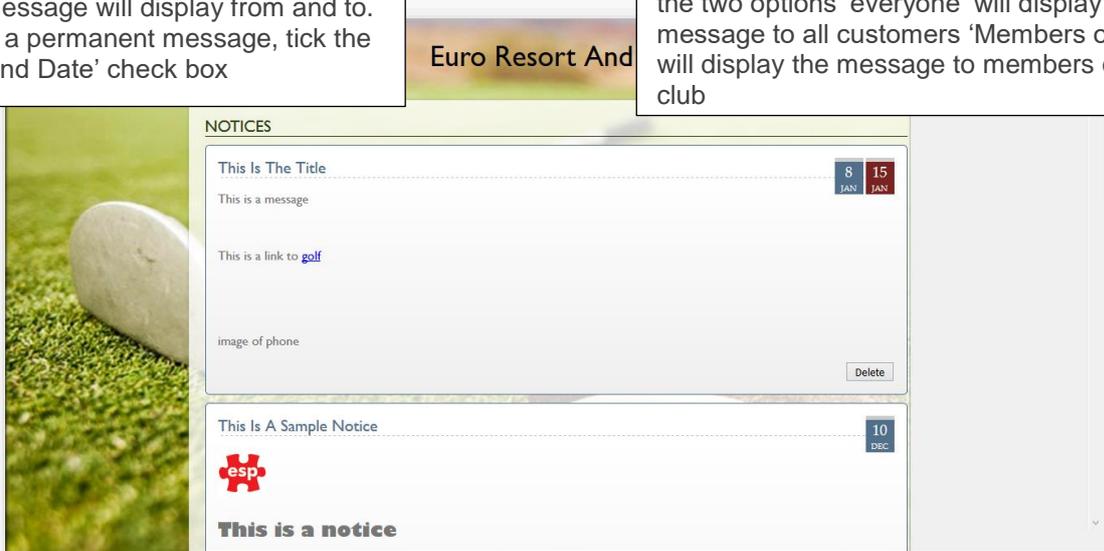
7.2 Club Notices – Navigation

NEW CLUB NOTICE

Start Date *

End Date
No end date

Visibility
Everyone

Title *

Notice *

File ▼ Edit ▼ Insert ▼ View ▼ Format ▼
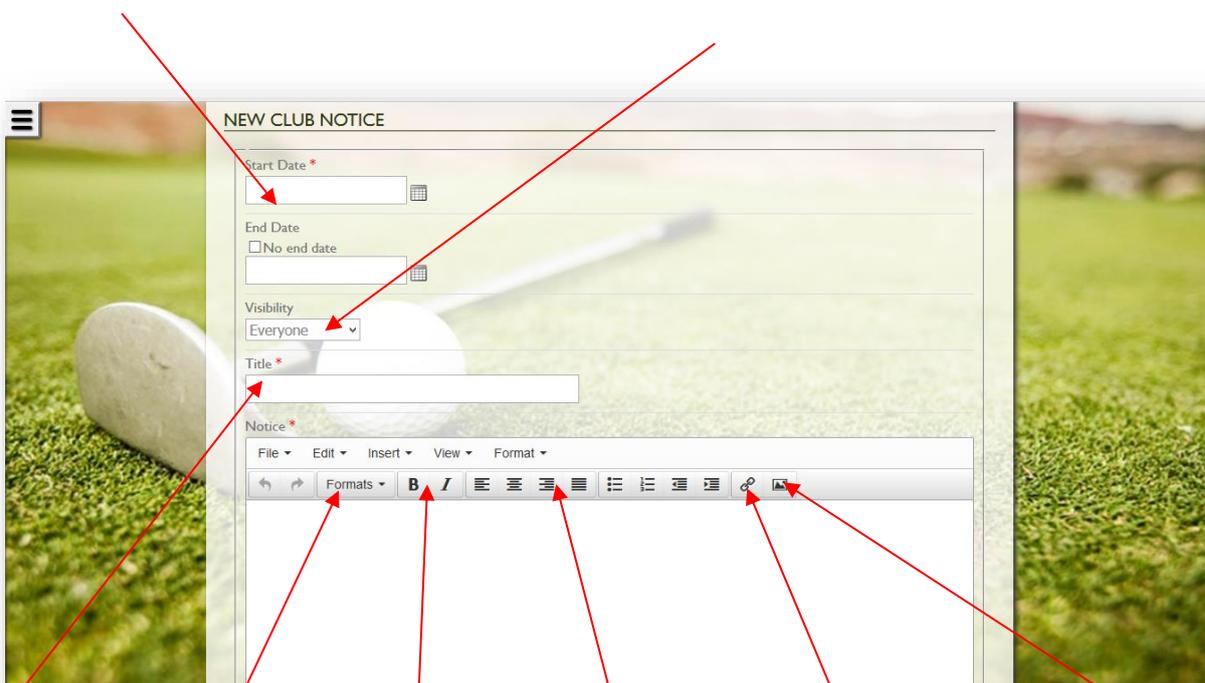
Formats ▼ B I

Title – Enter a title of the message.

Formats – Allows you to configure the font and style of the headings and text body.

Bold/Italic – Amends any text highlighted

**Page Layout Options** – Amends the alignment of text.

Insert/Edit a link – Add a link to another website URL by highlighting text or image and clicking on this option. Add the URL to the 'Source' Field.

Insert/edit Image – Insert an image onto the message (club logos/pictures etc.) by clicking on this option and uploading a saved image.

Hit 'Submit' to publish your notice.

8.0 Homepage Menu Options
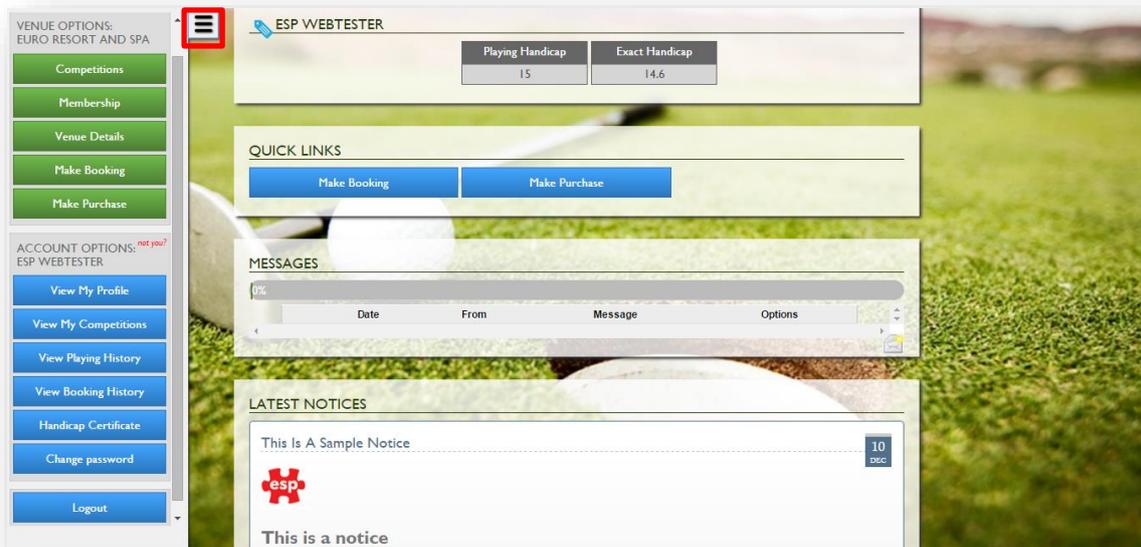
When selecting the menu icon highlighted in red above, the menu will appear as shown above.
The Club name will be shown first along with a number of Green Venue Options that relate to the club as a whole. Followed by the Account Options: Member's Name will be shown with blue Player options which specifically relate to the member who is currently logged in.

Each Green Venue Option does the following;

## 8.1 Venue Options:

8.2 Venue Options: Membership

Allows the Admin user (if set up) to see all registered member's details. Inline with GDPR, by default, each member details are set to Private (Web Private). This will hide the contact details of the member from other members.
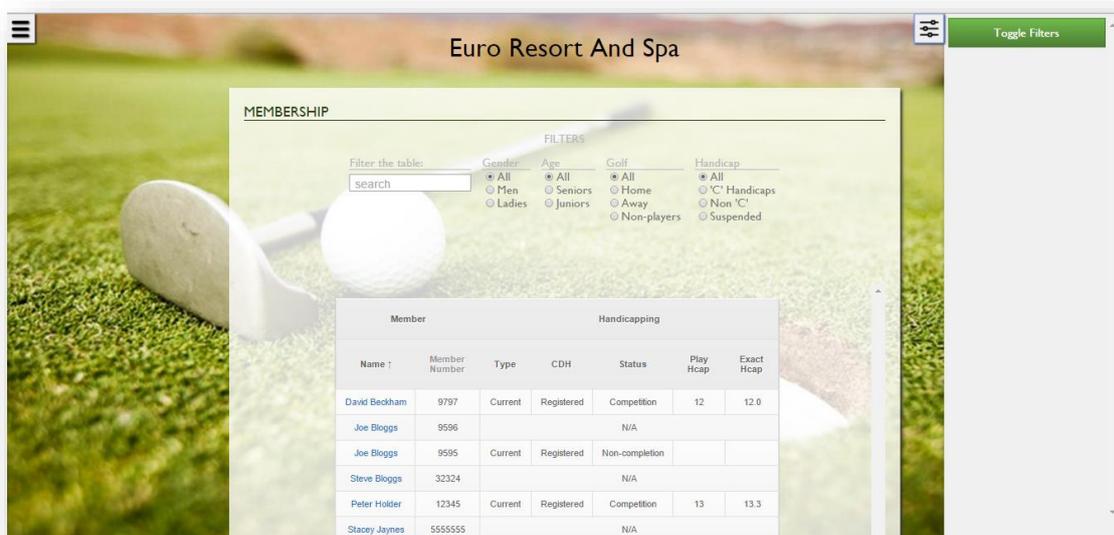
8.3 Venue Options: Venue Details

Allows the member to see the venue details of the club which include address and contact details as well as the course scorecard details.
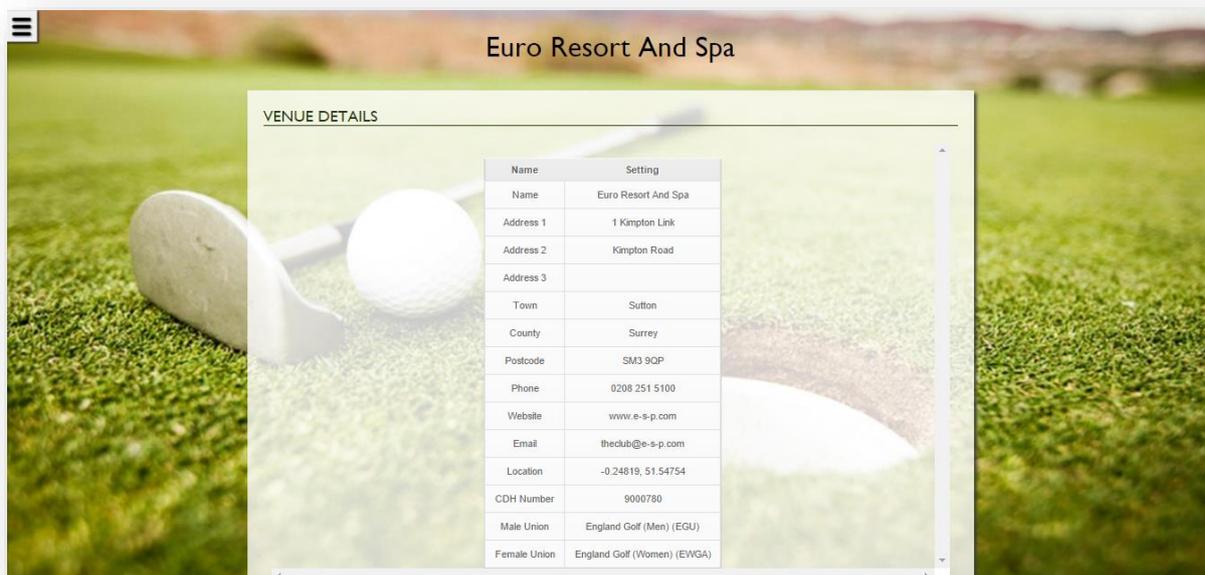
8.4 Venue Options: Make Booking

Allows the member to make a booking, please see 2.3 above on instructions how to make a booking as a member.

8.5 Venue Options: Make Purchase (Topping Up Levy)

If applicable, the club must have Levy Online functionality configured and enabled for this option to appear.

This option will allow the member to top up their Levy by selection one of the options below. Furthermore, by selection 'Click here to view Account Top Up statement'; the member will be able to see their Levy Statement appear. Please note each option is identical.

8.6 User Options: View My Profile

The View My Profile Option will show the member's profile where they have the option to change their e-mail address and also make their data private or not.

8.7 User Options: View Booking History / Online Cancellation

Option will show the member's booking history and also future bookings details will be displayed. As shown in the options field, the member has an option to cancel booking only if Online Cancellations are configured for the venue.

8.8 User Options: Change Password

Option will allow the member to change their password as shown below. New passwords must be 6 characters long and only contain letters and numbers.
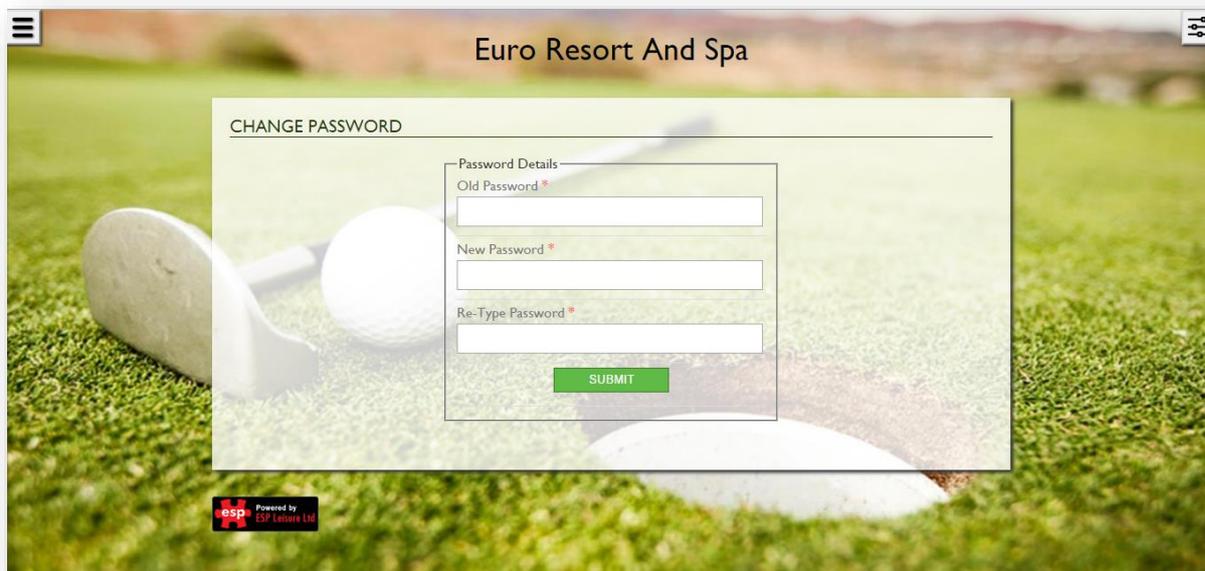
8.9 User Options: Logout

The Logout option will log the member out of ESP Live. They will have the option to log back in by selecting 'Re-login'.
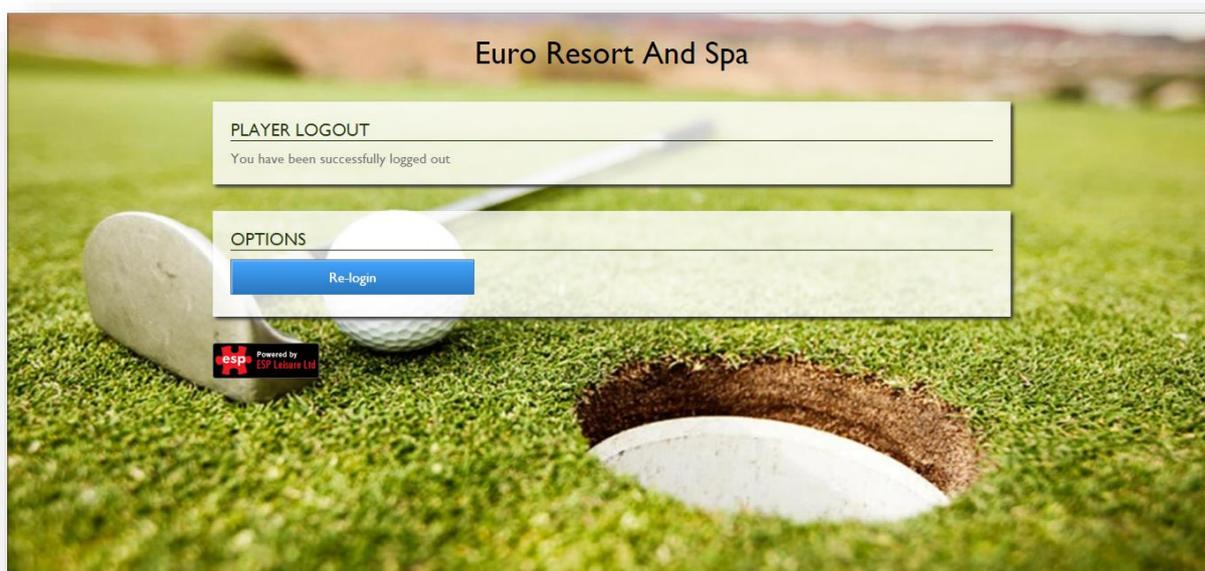
9.0 Member Registrations/Validation

The way in which Members are registered for access to the Online Booking Portal differs from how Visitors will be registered.

9.1 Sending Validation Emails in ESP Elite

Any new members who are required to access Elite Live will need to have a validation email sent out to their registered email address. This email contains the verification details required for the member to complete the registration process.

The method for doing this is very simple and requires administration staff at your site to send a registration request.

The process for doing this is detailed below.

From Elite, log into Customer Routines. Navigate to the correct customer in the database.

Select F7 Action from within the Customer Record and the following menu will be displayed.
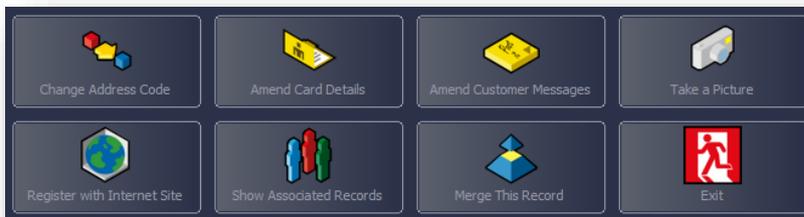
Select Register With Internet Site. The following box will be displayed.
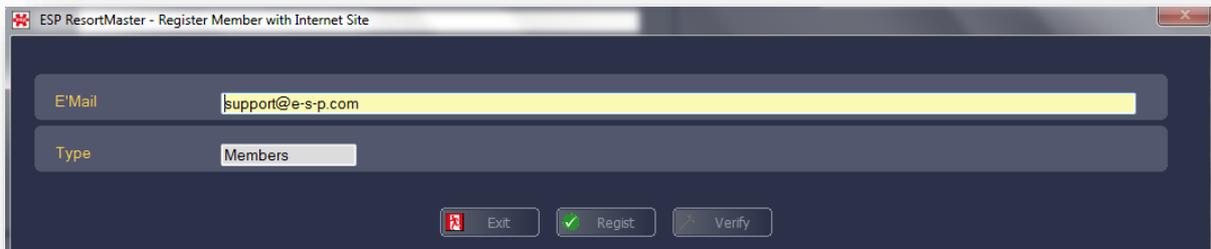
Fill in a Valid E-Mail Address and press click Register, and the following message will be displayed.
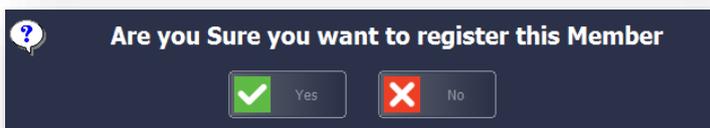
Select Yes and the registration request will be sent to the ESP Live Server which will generate verification details for the user and e-mail it to them.

10. Reporting

The following reports will be available within your system when Internet Bookings is installed.

10.1 End of Day Web Bookings Report

An additional report will print when End of Day is run through the Retail System each day. This will detail all of the bookings received via the Website during the current day. An example is shown below.


10.2 Web Bookings Report

This report will be available on the Standard Reports Menu of the Administration System. This will detail all of the bookings received via the Website for your specified date range. An example is shown below.

10.3 Web Bookings Chart

The Web Bookings Chart allows you to extract the Web Booking information from the system into an Excel PivotTable® and PivotChart® in order to make customised reports. There will be 3 pages in the Excel Workbook. The first page will be the PivotChart® of which an example is shown below.

The second page will be the PivotTable® data, as shown below.

	A	B	C	D	E
1	CompName	(All)			
2	Currency	(All)			
3					
4	Sum of People	Activity			
5	Month	18_H1ST	18_M1ST	9_SHEY	Grand Total
6	January	140	14	61	215
7	February	217	9	66	292
8	March	314	49	116	479
9	April	551	83	162	796
10	May	501	82	210	793
11	June	503	99	168	770
12	July	536	103	171	810
13	Grand Total	2762	439	954	4155
14					

The third sheet in the Excel Workbook will include the data that makes up the PivotTable® and PivotChart®. This data includes the E-mail addresses for the Visitors which have made bookings in your system which can be used for marketing purposes.