NORA (Newport Ski Club Online Reservation Administration)
Instructions for Administrators, Reservationists, LM, ALM, Treasurer
Updated 04/11/23

TABLE OF CONTENTS

1. How to log in as an Administrator

The following roles have 'administrator' access:

a. System Administrators
b. Reservationists (see annual lodge schedule)

1. Have a System Administrator grant you 'administrator' access if you do not have it already.
2. Log in as an Administrator at: https://bookings.newportskiclub.org
3. Enter the username that the System Administrator assigned to you.
4. **Obtain an Administrator password.** Note: The password that you use as a 'member' will not work. You need to create another password as an 'Administrator' by navigating as follows:
   -> Retrieve your Member Number or password
   -> Enter the email address associated with your membership
   -> Get Password
   -> Dismiss the message pertaining to the email just sent to you
   -> Retrieve the password from the email just sent to you (If you prefer, you can change your password later by navigating to 'Manage Account' -> Change Password)
   -> Click 'Log In'
5. If you have any further questions about the system, send an email to bookings@newportskiclub.org.

2. How to cancel a reservation

1. Log in as an Administrator at: https://bookings.newportskiclub.org
2. Click 'Bookings'
3. Click 'Manage Bookings'
4. Select 'Tentative' from within 'Booking Status'
5. Enter the member's last name in the 'member' field.
6. Identify the booking which you wish to cancel.
7. Click the pencil in the right-most column of the booking.
8. Change the 'Booking Status' in the left-hand column to 'Cancelled'.
9. Click on 'AutoCalculate Credit'.
10. Make sure that the value in the 'Admin Price' field is correct and, if not, correct it. The value should be '0' unless the member owes money for food cancelled after the deadline.
11. Enter a reason for the cancellation.

12. Click 'Save' near the top of the reservation.

13. To cancel a reservation for a date in the past, you must first cancel the reservation, re-retrieve it, then change the 'Admin Price' to 'zero' and click on 'AutoCalculate Credit'.

3. How to change a reservation, including adding or removing food selections.

1. Log in as an Administrator at: https://bookings.newportskiclub.org
2. Click 'Bookings'
3. Click 'Manage Bookings'
4. Select 'Tentative' from within 'Booking Status'
5. Enter the member's last name in the 'member' field.
6. Identify the booking which you wish to change.
7. Click the pencil in the right-most column of the booking.
8. Click 'Edit via Matrix'
9. Step through the booking making any necessary changes.
10. To add a food selection, follow the usual keying instructions for selecting food.
11. To remove a food selection, de-select any food selections.
12. When adding or removing food, update the field 'admin price' with the revised total cost of the booking with the food added or subtracted.
13. Click 'save'.

4. How to reinstate a cancelled reservation.

1. Log in as an Administrator at: https://bookings.newportskiclub.org
2. Click ‘Bookings’
3. Click ‘Manage Bookings’
4. Select ‘Cancelled’ from within ‘Booking Status’
5. Enter the member’s last name in the ‘member’ field.
6. Identify the booking which you wish to change.
7. Click the pencil in the right-most column of the booking.
8. Change the booking status from ‘cancelled’ to ‘tentative’.
9. Click ‘Save’.
10. When the system returns the screen, click ‘Confirm and Update Admin Price’
11. Enter a ‘Reason for change’
12. Click ‘Save’

5. How to send a bulk email to weekend participants:

1. Log in as an Administrator at: https://bookings.newportskiclub.org
2. Click ‘Bookings’
3. Click ‘Bulk Email’
4. Click ‘Create’
5. Enter the email subject line in ‘Subject’
6. Under ‘Booking Status’, select ‘Tentative’ from the drop down
7. Enter the Friday date of your weekend as the ‘start date’
8. Enter the Saturday date of your weekend as the ‘end date’
9. Write your message in the block at the bottom, below the word ‘Paragraph’
10. Click ‘Save New Email’ near the top of the form.
11. Click ‘Test Bulk Email/SMS’ and enter your email address
12. Retrieve the test email, verify the results and make any corrections to the message.
13. Click ‘Send Bulk Email/SMS’

6. How to create an invoice to a member or applicant for food charges if cancellation occurs after the Wednesday deadline. This process also applies to applicant fees, dues, initiation fees, locker rental payments, lodging fees, obligation assessments, late fees or fees for social events.

1. Log in as an Administrator.
2. Click 'Member and Transaction'.
3. Click 'Manage Transaction'
4. Click 'Insert Transaction'
5. Enter the member surname.
6. Select the member from the dropdown box.
7. Select the transaction type 'invoice'.
8. Enter the date of the invoice.
9. Enter the invoice amount.
10. For 'description', use a naming convention such that each fee appears uniquely and consistently in management reports. For example, always use 'lodging fee' as the description for mid-week or weekend lodging payments due.
11. Click 'Save Transaction'.
12. You can email the invoice to the member by clicking the 'email' button and entering the member's email address.

Alternately, for lodging fees and fees for social events only:

1. Log in as an Administrator
2. Click 'Bookings'.
3. Click 'Manage Bookings'
4. Click the statuses of 'tentative' and 'confirmed' from the box 'Booking Status'.
5. Enter member's last name in the box 'contact name'.
6. Identify the booking for which you wish to send an invoice.
7. Click the pencil in the right-most column of the booking.
8. Click 'email invoice'.

7. How to accept cash or paper check payments from a member or applicant for applicant fees, dues, initiation fees, locker rental fees, obligation assessments or late fees.

1. Log in as an Administrator.
2. Click ‘Member and Transaction’.
3. Click ‘Manage Transaction’.
4. Enter member’s last name in the box ‘member surname’.
5. Identify the invoice for which you wish to accept payment.
6. Record on paper the transaction ID from Column 1 and the Booking ID (NP000[xx]) from the ‘Description’.
7. Record on paper the amount of the transaction.
8. Go back to the tab with the listing of all transactions.
9. Click ‘Insert Transaction’
10. Enter the member surname.
11. Select the member from the dropdown box.
12. Select transaction type ‘receipt’.
13. Enter the date that the receipt was paid.
14. Enter the receipt amount.
15. For ‘description’, use a naming convention such that each payment appears uniquely and consistently in management reports. For example, always use ‘locker rental payment’ as the description for locker rental payments.
16. Select the payment method of ‘cash’ for both cash payments or paper check payments.
17. Enter the transaction ID from Step 8 above.
18. Click ‘Save Transaction’.
19. You can email the invoice to the member by clicking the ‘email’ button and entering the member’s email address.

8. How to accept cash or paper check payments from a member for lodging bookings.

1. Log in as an Administrator.
2. Click ‘Member and Transaction’.
3. Click ‘Manage Transaction’
4. Enter member’s last name in the box ‘member surname’.
5. Identify the invoice for which you wish to accept payment.
6. Click on the Booking ID (NP000[xx]) in the ‘Booking’ column for the identified invoice.
7. Change the Booking Status in the left-hand column to ‘confirmed’. Note: You could do this after you log the payment if you prefer to make sure that everything worked correctly.
8. Click ‘Insert Transaction’.
9. Select transaction type ‘receipt’.
10. Enter the date that the receipt was paid.
11. Enter the receipt amount.
12. For ‘description’, you will see the booking number (NP0000xxX) and the ‘price’.
13. Select the payment method of ‘cash’ for both cash payments or paper check payments.
14. Enter your check number.
15. Click ‘Save Transaction’.
16. The system will instantly generate an email receipt to the member for this transaction. The email receipt will include an entry for all payments for a given date. The email receipt will also include an entry for all invoices for a given date, including invoices for fees such as work weekend assessments. The receipt will not include entries for booking invoices unless the invoice was sent on the same date as the payment you are accepting.
17. You can email the invoice to the member by clicking the ‘email’ button and entering the member’s email address.

Another way to find the booking is:

1. Log in as an Administrator.
2. Click ‘Bookings’.
3. Click ‘Manage Bookings’.
4. Click the statuses of ‘tentative’ and ‘confirmed’ from the box ‘booking status’.
5. Enter member’s last name in the box ‘member’.
6. Identify the invoice for which you wish to accept payment.
7. Click on the pencil in the right-most column that corresponds to the booking.
8. Follow the instructions above beginning with Step 7.

9 How to accept cash or paper check payments from a member for social events.

1. Log in as an Administrator.
2. Click ‘Member and Transaction’.
3. Click ‘Manage Transaction’
4. Enter member’s last name in the box ‘member surname’.
5. Identify the invoice for which you wish to accept payment.
6. Click on the Booking ID (E000[xx]) in the ‘Booking’ column for the identified invoice.
7. Change the Booking Status in the left-hand column to ‘confirmed’. Note: You could do this after you log the payment if you prefer to make sure that everything worked correctly.
8. Click ‘Insert Transaction’.
9. Select transaction type ‘receipt’.
10. Enter the date that the receipt was paid.
11. Enter the receipt amount.
12. For ‘description’, you will see the booking number (E0000xxX) and the ‘price’.
13. Select the payment method of ‘cash’ for both cash payments or paper check payments.
14. Enter your check number.
15. Click ‘Save Transaction’.
16. The system will instantly generate an email receipt to the member for this transaction. The email receipt will include an entry for all payments for a given date. The email receipt will also include an entry for all invoices for a given date, including invoices for fees such as work weekend assessments. The receipt will not include entries for booking invoices unless the invoice was sent on the same date as the payment you are accepting.
17. You can email the invoice to the member by clicking the ‘email’ button and entering the member’s email address.

Another way to find the booking is:

1. Log in as an Administrator.
2. Click ‘Bookings’.
3. Click ‘Manage Bookings’.
4. Click the statuses of ‘tentative’ and ‘confirmed’ from the box ‘booking status’.
5. Enter member’s last name in the box ‘member’.
6. Identify the invoice for which you wish to accept payment.
7. Click on the pencil in the right-most column that corresponds to the booking.
8. Follow the instructions above beginning with Step 7.

10. How to reverse an invoice or a receipt.

1. Log in as an Administrator.
2. Click ‘Member and Transaction’.
3. Click ‘Manage Transaction’.
4. Enter member’s last name in the box ‘member surname’.
5. Identify the invoice which you wish to reverse.
6. Click on the pencil in the right-most column on the member’s list of transactions
7. Click on the red box labelled ‘reverse’.
8. Enter a comment in the ‘Reverse comment box’.
9. Click ‘OK’.

   Tip: The system keeps a running account balance for each member. The balance appears in the column labelled ‘balance’ on the top-most entry in a member’s list of transactions.

11. How to create a report of receipts and/or invoices for a member.

1. Log in as an administrator
2. Click ‘Member and Transaction’.
3. Click ‘Manage Transaction’.
4. Enter the member surname.
5. Select the member from the dropdown.
6. Click the transaction types of ‘invoice’ and ‘receipt’ from the dropdown in ‘Txn Type’.
7. Enter the ‘created / paid from’ date and the ‘created / paid to’ date. Note: you must enter dates to obtain this report.
8. Click ‘Download’
9. Click on ‘Download Transaction Data’.
10. Filter the result by ‘Invoice’ or by ‘Receipt’ (Column B).

11. 12 **How to create a monthly report of receipts for applicant fees, dues, initiation fees, locker rental payments, lodging payments, obligation assessments and late fees**

1. Log in as an Administrator.
2. Click ‘Member and Transaction’.
3. Click ‘Manage Transaction’
4. Select ‘Receipt’ from the dropdown ‘Txn Type’ (Transaction Type)
5. Key a report start date into ‘Created / Paid From’.
6. Key a report end date into ‘Created / Paid To’.
7. Click on ‘Download’.
8. Click on ‘Download Transaction Data’.
9. Filter the results in the spreadsheet by transaction type ‘Receipt’ (Column B).
10. Sum up the amounts in the ‘Amount’ column (Column H).

IMPORTANT NOTE1: This is a report of the financial *transactions* occurring during the month. It may or may not correspond to the lodge bookings for that month. For example, a payment made on 02/01/22 for a booking that occurred for the weekend of 01/30/22 to 02/01/22 will appear on the monthly report for date of the payment - February.

IMPORTANT NOTE2: The lodging receipts in this report include meal payments. There are two ways to separate meal payments from lodging payments. The treasurer must follow the selected option consistently in order for the accounting-year to balance.

Option 1. Create a report of meal bookings for the month and subtract the meal amount from the lodging amount in the monthly report of receipts. Note that the meal bookings may or may not correspond to the lodging receipts. For example, for the weekend of 01/30/22 to 02/01/22, only the meals booked from 02/01/22 will appear on the same report as the receipt paid on 02/01/22.

Option 2. Create a report of meal bookings for the month and subtract it from a report of the lodging bookings for the month. Note that this method may or may not line up with the actual dollars received during a month.

13 How to create a monthly report of meal bookings

1. Log in as an Administrator.
2. Click ‘Bookings’.
3. Click ‘Manage Bookings’
4. Click ‘Download’
5. Click ‘Optional Extras’
6. Select ‘Reservation’ from the dropdown ‘Select Lodge’.
7. Enter ‘Report Start Date’
8. Enter ‘Report End Date’
9. Click on ‘Download Booking Data’.
10. Filter the results in the spreadsheet by option ‘Weekend Meals’ or ‘Weekday Meal Chip In’ or ‘Saturday [breakfast/lunch/dinner] (Column D).
11. Sum up the amounts in the ‘Cost’ column (Column F).

14 How to create a monthly report of lodging bookings

1. Log in as an Administrator.
2. Click 'Bookings'.
3. Click 'Manage Bookings'
4. Click 'Download'
5. Click 'One row per booking'
6. Select 'Reservation' from the dropdown 'Select Lodge'.
7. Enter 'Report Start Date'
8. Enter 'Report End Date'
9. Click on 'Download Booking Data'.
10. Filter the results in the spreadsheet by Booking Status 'Confirmed' (Column O).
11. Sum up the amounts in the 'Actual Cost' column (Column N).

14. How to create a monthly report of events bookings

1. Log in as an Administrator.
2. Click 'Bookings'.
3. Click 'Manage Bookings'
4. Click 'Download'
5. Click 'One row per booking'
6. Select 'Events' from the dropdown 'Select Lodge'.
7. Enter 'Report Start Date'
8. Enter 'Report End Date'
9. Click on 'Download Booking Data'.
10. Filter the results in the spreadsheet by Booking Status 'Confirmed' (Column O).
11. Sum up the amounts in the 'Actual Cost' column (Column N).

16. How to create a social event. Note: you must follow the exact sequence below. Failure to perform the steps in order could result in missing components – such as rates - for your event.

1. Log in as an Administrator.
2. Click ‘Bookings’.
3. Click ‘Lodge Availability’.
4. Select ‘Events’ from the ‘Lodge’ dropdown
5. **Click ‘Create Lodge Special Period’.**
6. Enter the date of the event in ‘First Night’.
7. Enter the date of the event (same date as above) in ‘Last Night’.
8. Enter a ‘Reason’. Note: This ‘reason’ will appear on the Booking page when hovering over the reservation block corresponding to the event row and column.
9. Click ‘Bookings Allowed’.
10. Enter ‘Member’ in the dropdown ‘Access Level’.
11. Click ‘Create Lodge Special Period’.
12. Click ‘Tariffs’.
13. Click ‘Tariff Sets’.
14. Select ‘Events’ from the ‘Lodge’ dropdown. Important: you must do this step in this order.
15. **Click ‘Create New Tariff Set’.**
16. Enter the title of your Event in ‘Title’.
17. Enter the fee for each type of member in the ‘per night’ boxes. (If you use the ‘flat fee’ field, the system charges one fee regardless of the number of people in your reservation.’)
18. Click ‘Create Tariff Set’.
19. Select ‘Tariffs’.
20. Select ‘Season Periods’.
21. Select ‘Events’ from the ‘Lodge’ dropdown.
22. **Select ‘Create Season’.**
23. Enter the title of your event in ‘Name’.
24. Enter the date of your event in ‘start date’.
25. Enter the date of your event in ‘end date’.
26. Enter the maximum number of people allowed to attend your event in ‘maximum number of beds available in this lodge’.
27. Enter the maximum number of people allowed for a member to book for your event, if any, in ‘maximum number of people in a booking’.
28. Select the tariff set that you created in steps 11 – 16 from the ‘Tariff set’ dropdown.
29. Select ‘create season’.

17. How to create a blackout period to block reservations.

1. Log in as an Administrator.
2. Click ‘Bookings’.
3. Click ‘Lodge Availability’.
4. **Click ‘Create Lodge Special Period’.**
5. Select ‘Events’ from the ‘Lodge’ dropdown
6. Enter the date of the event in ‘First Night’.
7. Enter the date of the event (same date as above) in ‘Last Night’.
8. Enter a ‘Reason’. Note: This ‘reason’ will appear on the Booking page when hovering over the reservation block corresponding to the event row and column.
9. DO NOT click ‘Bookings Allowed’. This will prevent bookings during the period.
10. Enter ‘Member’ in the dropdown ‘Access Level’.
11. Click ‘Create Lodge Special Period’.