

QikBook Manual

The QikBook difference - Architecture

Many co-working booking applications are built like a pyramid and have a “System Admin” at the top who is usually the business owner.

Their customers (Users) sign up and login to System Admin’s application, as a class of User that ranks below System Admin.

System Admin assigns these logged in Users to a fixed role, such as “staff”, “member”, “user” or “customer”, etc and the User inherits the permissions specified for that role.

The main thing to note here, is that the User signs up to (and logs in to) the System Admin’s own business application.

QikBook has a different approach.

A QikBook User signs up and logs in to their **own** application.

The QikBook app (free to Users) **is a universal tool to book** Rooms on all QikBook Listings.

Every QikBook User **also has the built-in option** of creating their own Listing (i.e. business application) with their own Rooms and private list of Users to book those Rooms.

So, while a User can book Rooms belonging to other businesses, they can also have other Users booking their own Rooms - on the same QikBook application.

If a QikBook User doesn’t wish to create their own Listing, then they simply use their app to book Rooms or spaces on any QikBook Listing - provided that the User has been added to that Listing’s User List by the Owner/Admin. In short, a Listing Owner controls who can access their Listing.

For example, if Amanda signs up to QikBook and then creates a Listing for her Rooms - she can then add anyone to her User List. Let’s say she adds Eric to her User List.

QikBook auto-sends Eric an email invitation to Amanda’s Listing. Eric signs up to QikBook. The instant he signs up, Amanda’s Listing and Rooms appear on Eric’s QikBook app - and he can immediately book Amanda’s Rooms.

Eric might be on the User List of several Listings (businesses). And Eric can book all of these Rooms with his own application - he doesn’t have to find, and log in to, each business owner’s application separately.

So, **QikBook has a horizontal architecture** - not the more common monolithic hierarchical architecture.

One of the benefits of this architecture is that a User is nearly always logged in to their own app - and their favorite spaces are at their finger tips. And your Rooms are instantly available to them when they open their application.

The advantages of this architecture include the ability to have a marketplace for Listings - where Users can find your Rooms easily and request access.

Other advantages will become apparent as QikBook builds new features.

Diagram representing the architecture of QikBook

The diagram below shows how a User who is signed up to their own QikBook application can create their **one or more** Listings, which is useful if your business has many locations.

The Listing represents your business and is just like a folder. It's purpose is to contain your Rooms on the one hand and your list of Users on the other.

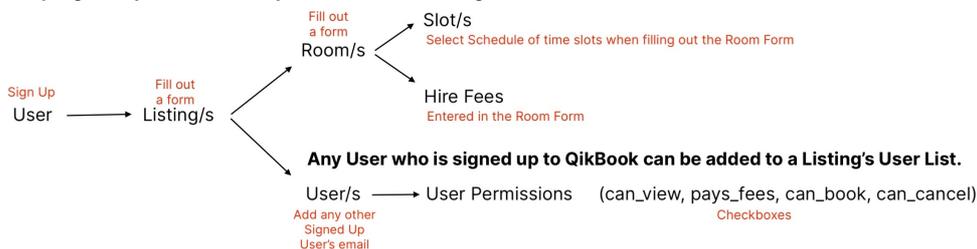
And when you add a User to your User List, then every time the User opens their application your Listing and Rooms are instantly loaded into that User's application - ready to book.

The Rooms that are loaded into this User's application come with the **User Permissions** you have set for that User. Initially, these are default permissions set by QikBook, but they can be edited by the Owner as soon as the "Edit Permissions" link appears for that User.

A Listing Owner can also select any User on their User List to be a Guest Admin for that Listing.

Here is a diagram of what the database architecture looks like.

Every Signed Up User has the option to Create a Listing.



Whenever the "Book" button is clicked - a booking (Log Item) is created (recorded).

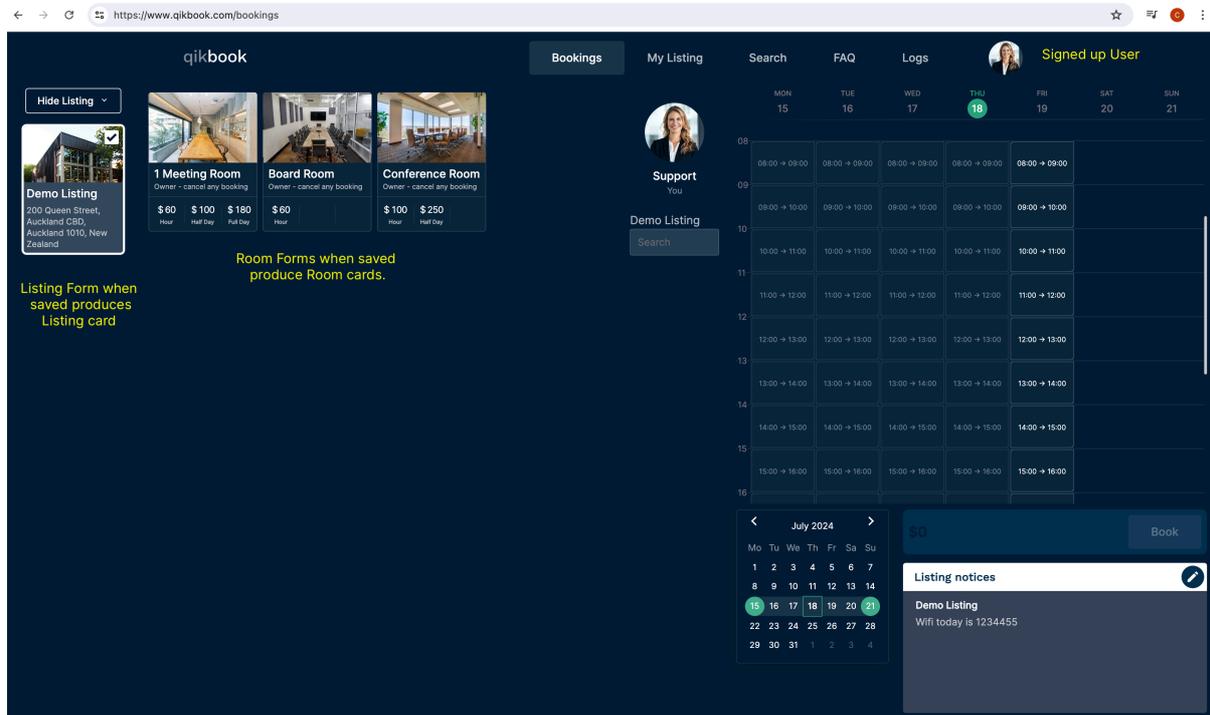
Log Item (booking) = Listing Room/s & Slot/s User (booked_for) User (booked_by) Payment (Hire Fees)

When a Log Item is cancelled it is marked as 'cancelled' but remains in the Log as a record.

*NOTE: A User who creates their own Listing is referred to as an "Owner" of that Listing. The word "Admin" can mean "Owner" or "Guest Admin" which are also used interchangeably in this document.

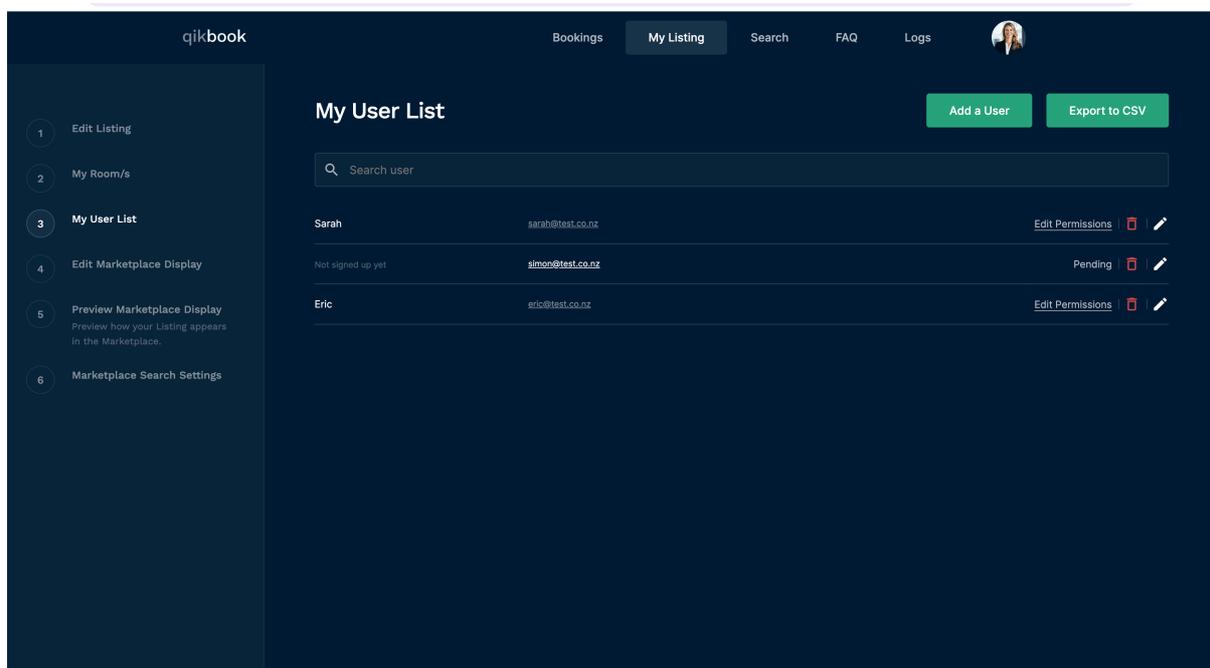
Big Picture

When the Listing Form and Room Forms are completed - this is how they appear in the Bookings page.



This page is where you add a User to your User List.

You add your Users by clicking the “Add a User” button which opens a form. You enter their email address and save. You also have an option to add a “user label” for your own reference if you wish - but this can be added at any time.



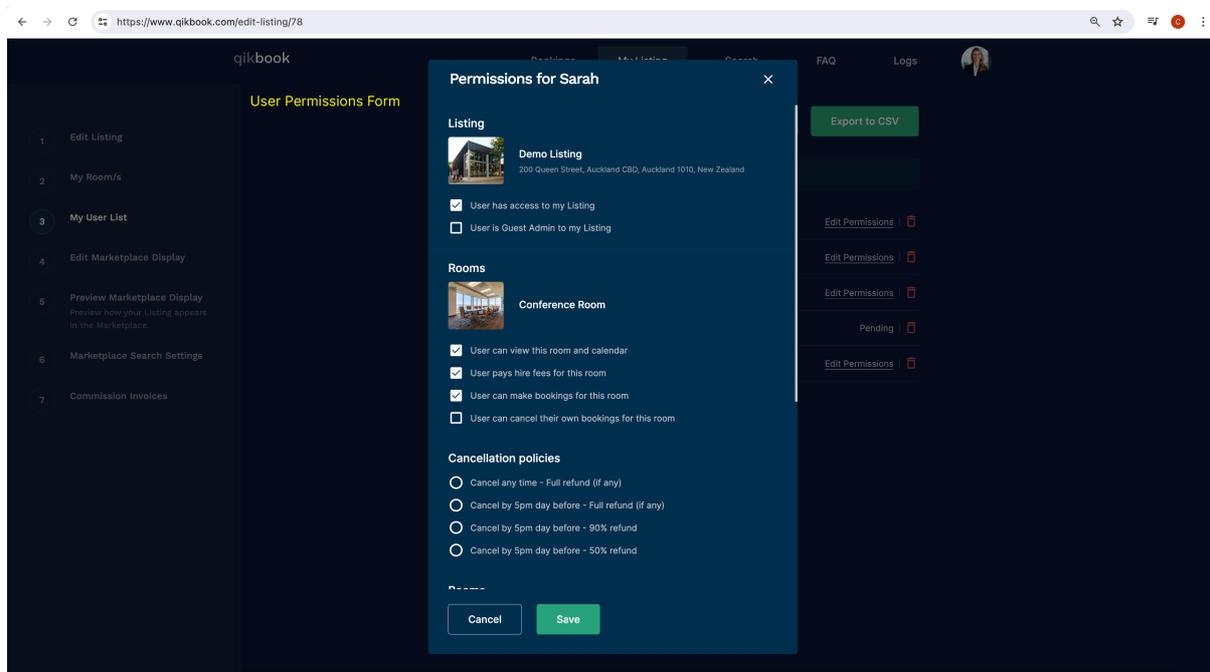
Here is what your User List would look like. You can see that 2 Users have already signed up to QikBook and therefore have a set of User Permissions assigned to them - which are opened by clicking the **“Edit Permissions”** link.

You will notice that one User is **“Pending”** - which means they have not yet signed up to their QikBook application. Their User ID has not yet been created in QikBook’s database.

After the User does sign up, their **“Edit Permissions”** link will instantly appear in the User List beside their name. When you click their **“Edit Permissions”** link, their **User Permissions Form** will open and you can edit any permission for that User.

Here is what a User Permissions Form looks like.

In this form, every Room in your Listing will appear in a vertical list - and each Room has a set of permissions attached to it - so you can edit each individually - for that User.



Big Picture Recap

Your Listing is like a folder to represent your business which contains:

1. Rooms - with image, name, hire fees, time slot Schedule Calendar and Restrictions Calendar
2. Users - with their email address, user label (optional) and the permissions that you assign to each User to govern how they go about booking and canceling your Rooms.

Create a Listing

A Listing is created by Signing Up to QikBook and clicking the “Create a Listing” tab which opens a **3 step process (below)** of filling out forms.

1. The first form is the **Listing Form** - with basic information to represent the business (Name, image and address). This acts as like a folder to contain your rooms and your users.
2. Next, fill out a **Add a Room Form** for each Room (name, image, schedule selected, hire fees).
3. Then add each User by filling out the **Add a User Form** entering their email address and saving.

Notes about a Listing.

A User can create multiple Listings under their User ID.

Each Listing can contain multiple Rooms and multiple Users on the Listing’s User List.

Each Room has a name, image, hire fees, and it’s own calendar Schedule of time slots and a Restrictions Calendar to block dates.

When the Room is selected by the User - it’s own calendar Schedule of fixed time slots is displayed.

Multiple time slots can be booked together. Multiple Rooms can be booked together within one booking - but only when they have a matching time slot Schedule. In the event that Rooms from separate Listings are booked together in one action, the booking will be split behind the scenes and logged as separate bookings under their respective Listings.

Each User on the User List will show an “Edit Permissions” link which opens their User Permissions Form.

The User Permissions Form lists every Room and permissions can be assigned for that User for each Room in turn.

The initial User Permissions that are assigned are ‘default’ permissions (described below) and can be edited at any time by the Owner or Guest Admin.

1. Listing Form

The screenshot shows the 'Your Listing' form in a dark-themed browser window. The URL is <https://www.qikbook.com/create-listing>. The form has a sidebar on the left with three steps: 1. Your Listing (active), 2. Your Room/s, and 3. Your List of Users. The main content area is titled 'Your Listing' and contains an 'Upload Image' button with a house icon. Below this are input fields for 'Business Name', 'Business Address' (with a placeholder 'Enter a location'), and a 'Timezone' dropdown menu currently set to '(GMT+12:00) Auckland, Wellington'. A 'Next' button is at the bottom right.

The image.

The image must be less than 500mb. Its purpose is to represent your business, so the subject might be an image of your building, which is appropriate in the context of rooms being the subject. But also, it might be a main entrance, a reception area or just a business logo. It will only be visible to your User List, so just needs to be an image that makes sense to your Users - not necessarily the public at large.

The business name.

The business name should be as short as possible. Again, the name here just needs to be recognizable to your Users who are booking your spaces.

The business address.

Business address is important particularly for being available to Search on the marketplace.

When entering an address, you will be prompted to select from a Google Maps address - and **you should** select your address from this prompt.

Selecting the Google Maps address also has the result of selecting the correct time zone for your Listing. This will determine what time zone your bookings are stored in - and this local time zone is reflected in the time slots and which slots have passed current time and no longer available for booking. The separate time zone field is just to double check the correct time zone is in force.

2. Add a Room Form.

The image.

The image must be less than 500mb. It's purpose is not to 'market' the room to the general public, but to be an easy visual reference to your regular customers as to which of your Rooms they are booking.

Room name.

The Room name should be as short as possible - and again as reference to your regular customers as to which room it is.

You can also create a second instance of the same room but with a separate non-conflicting time slot Schedule - e.g. an after hours Schedule such as "Green Room A/Hrs" with a 5pm - 10pm Schedule.

This can be useful if you would like a specific group of Users to book this Room after hours.

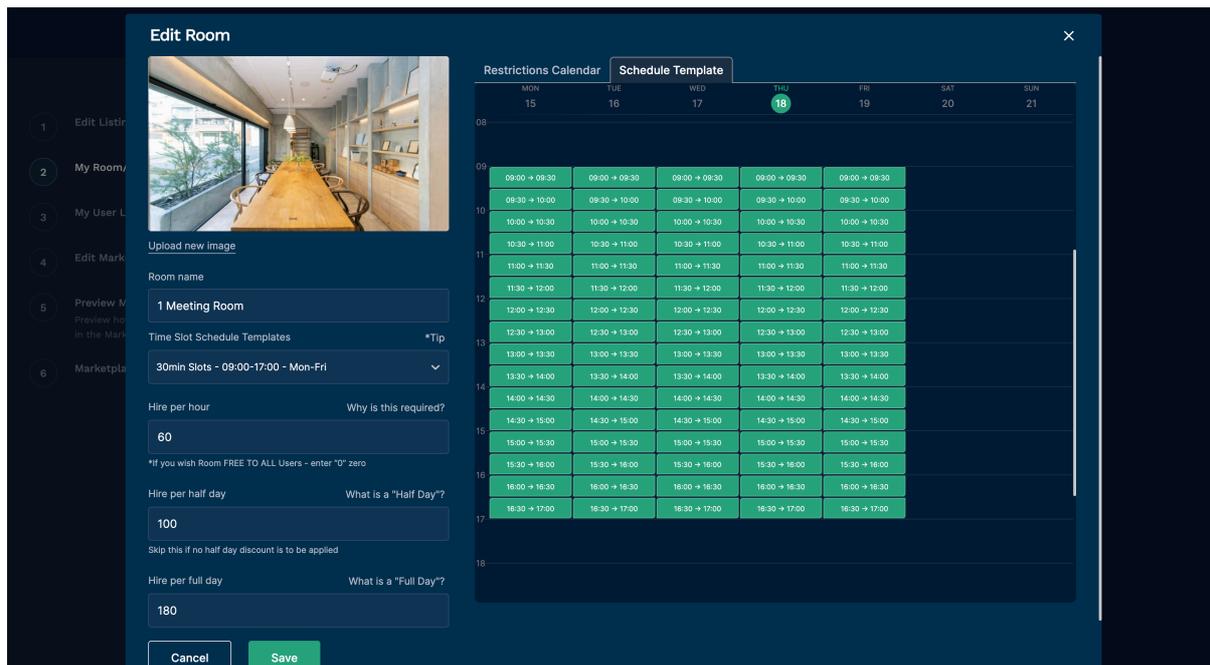
Time Slot Schedule.

You have a dropdown list of time slot Schedules to choose from. If you select "No Schedule selected", the Room will still render in your User's UI but there will be no time slots to book.

When you select a Schedule it will render in the calendar grid adjacent for you to see visually. If it doesn't suit, just scroll down and select another.

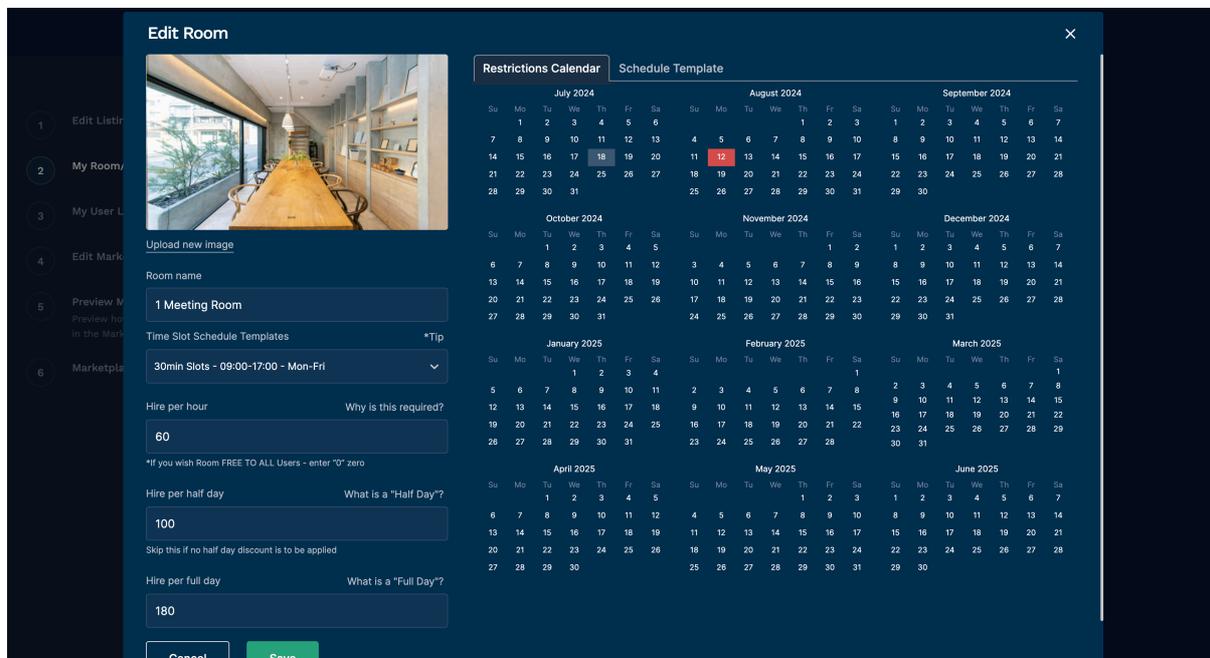
The Schedule is saved with all the other inputs when you click the "Save" button at the bottom of the form.

These Schedules have been built by QikBook. If there is not a Schedule that exactly suits your needs - call or email the Founder and a custom Schedule will be built for you in a few hours. In future, we'll built a tool so you can build your own custom Schedules.



You can change the Schedule for this room at any time, but before you do, you must cancel all future bookings (if there are any) for this Room from the present time forward.

Restrictions Calendar.



A Room will inherit it's own Restrictions Calendar **after** it has been created and saved. You can access the Room's Restrictions Calendar when you open the Edit Room Form.

In the Edit Room Form select the Restrictions Calendar tab and a 12 month calendar will appear.

Simply click any date and it will turn red. This will instantly block all bookings for that room for that date. If there is a booking for that Room on that date - you will get a popup notice saying you must cancel bookings on that date before a date restriction can be applied.

In the Bookings page all the time slots for a Room on a restricted date will be red.

To remove that date restriction, simply click the red date in the Restrictions Calendar and it will be instantly removed. Again, you do not need to click the "Save" button at the bottom of the Room Form. Just click the date. When it turns red that date will be restricted.

Time Slots.

The minimum duration for a time slot is 15min. This is more to do with pixels and the size of the slots that can be clicked and tapped easily on mobile.

Time slots can be built by QikBook to be any length with any buffers and placed anywhere in the weekly Schedule. Email or call the Founder **if you would like a customized Schedule** and it will be built within a couple of hours and available for you to select in the Room Form.

Hire Fees.

Hire per hour

The "Hire per hour" hire fee is a **required** input. So, there must be an amount entered here or you cannot save the form.

The "Hire per hour" fee is used by QikBook to calculate the hire fees for all time slots of all durations for that Room.

If a Room is free, you can enter "0" (number zero) into the "Hire per hour" input. All slots selected for this Room will be calculated to be \$0.

Half Day / Full Day discounts.

The "Hire per half day" and "Hire per full day" inputs are **optional**.

Hire per half day

This amount will be applied when: 1) the User has selected **all the slots before midday** (or after midday), and 2) there are **2 or more** slots before (or after) midday.

If there is only one slot before midday - the "Hire per half day" discount is **not applied**. That one slot before or after midday would be calculated at the "Hire per hour" rate.

If an individual time slot starts before midday and ends after midday (i.e. straddles midday) - it is **not included** in the "Hire per half day" discount. I.e. it will be calculated at the "Hire per hour" rate.

Hire per full day

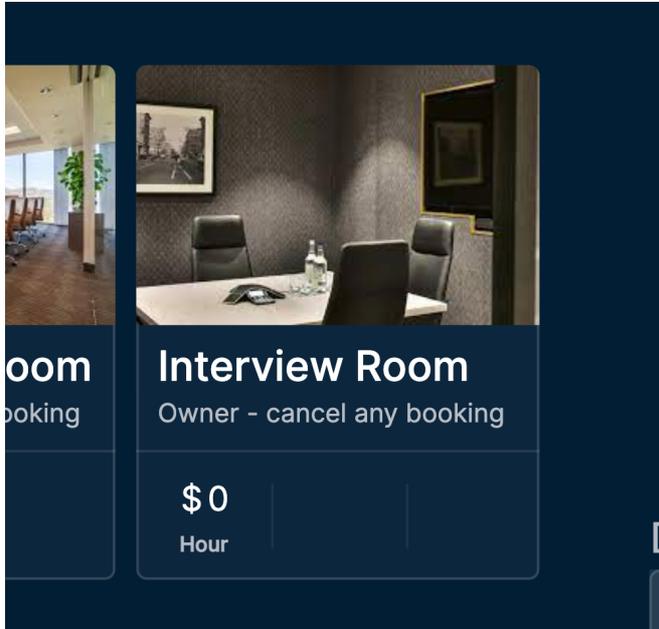
This amount will be applied when: 1) the User has selected **all the slots for the day**, and 2) there are **2 or more** slots in the day.

If you have a Desk or Room where you will only accept a full day booking, you can choose to have a Schedule of full day slots - of say 8 hrs - and set the "Hire per hour" rate to give you the price you

want for a full day booking. Or you can have a Schedule of shorter slots and set prices to incentivize a full day booking.

How hire fees are displayed to the User.

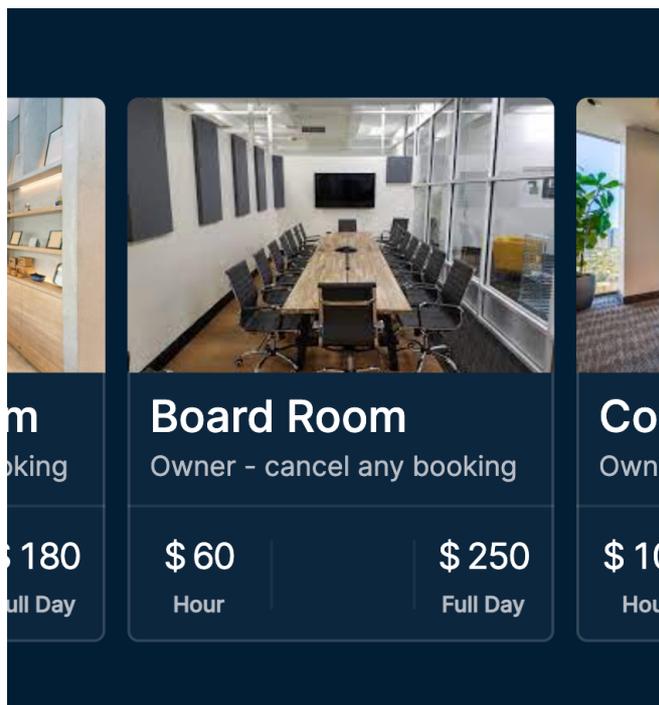
If you enter a “Hire per hour” fee of “0” (zero number) and enter nothing the “Hire per half day” and “Hire per full day” inputs, this is how the Room card will display to all Users.



All slots will be calculated at \$0. If you enter the number '40' in the “Hire per hour” input, it will render in the Room card as \$40 Hour.

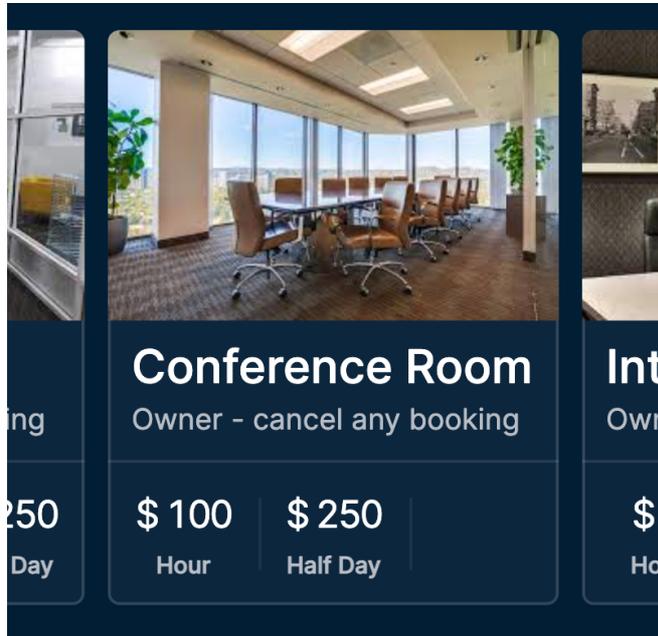
If you either skip or enter “0” (zero) in the “Hire per half day” or “Hire per full day” then those discount rates will not display in the Room card and half day or full day discounts will not apply.

You can skip the “Hire per half day” rate and enter a “Hire per full day” rate. Let's say you enter a “Hire per hour” rate of '60' and a “Hire per full day” rate of '250'



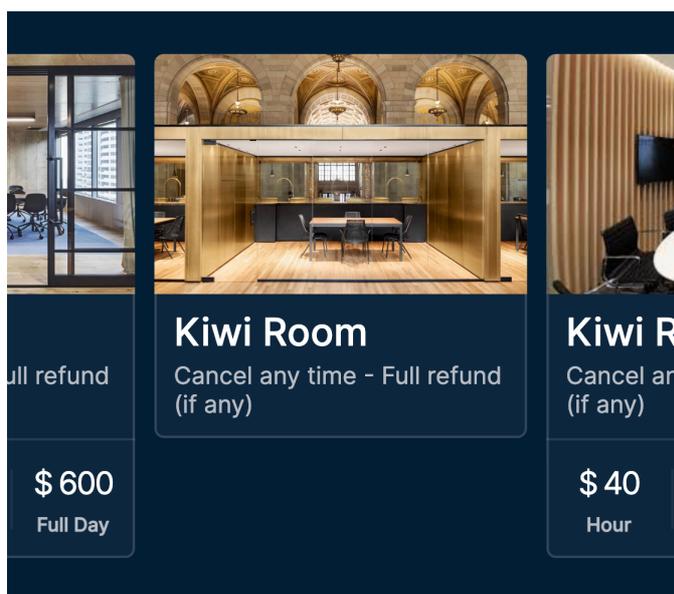
The User can instantly see that a full day discount is available and there is no half day discount.

And if you enter a “Hire per hour” rate of ‘100’ and a “Hire per half day” rate of ‘250’ and **skip or enter ‘0’ zero** in the “Hire per full day”.



The User can see instantly that only a half day discount applies.

Users **who do not pay hire fees** will not see hire fees displayed in their Room card. These are Users who have the permission “[] User pays hire fees for

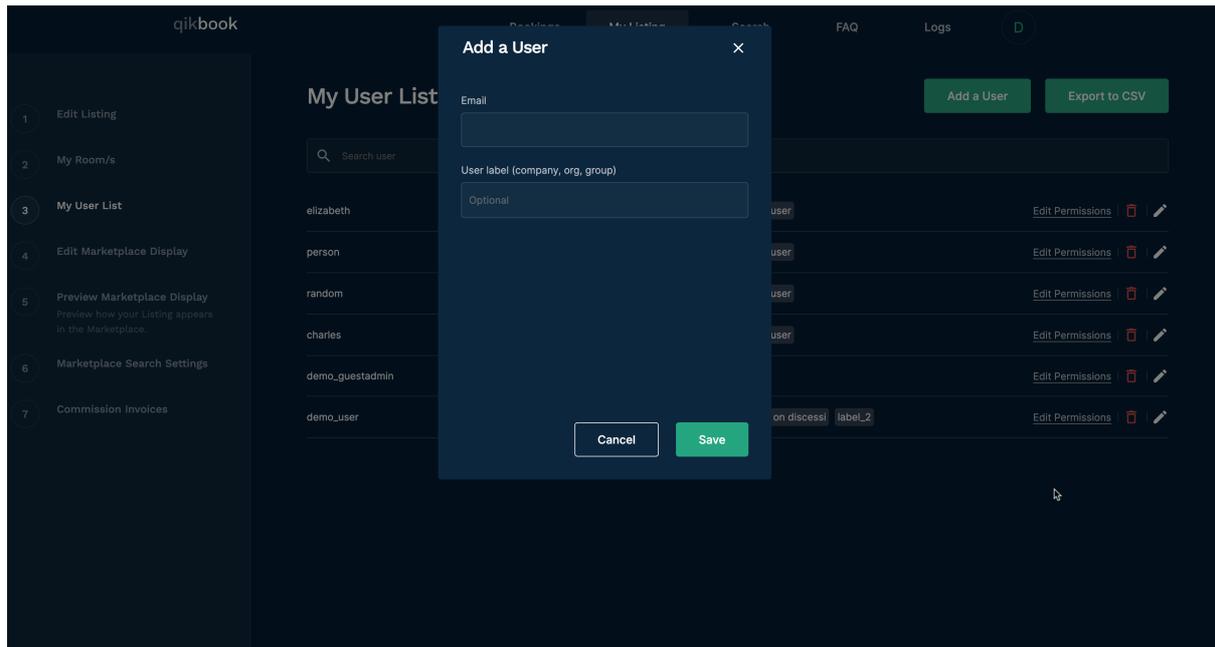


this room” **unchecked**.

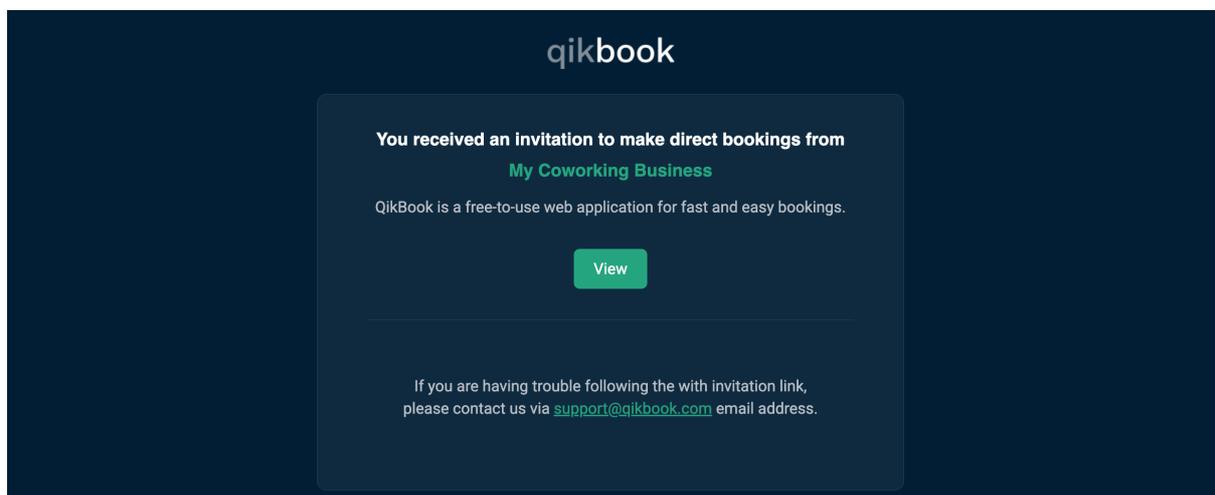
3. Add a User Form.

Add a User

Adding the email address of your User is all that is required. This is the email address that your User will use to sign up to QikBook to receive your Listing and Rooms on their application. Here is the Add User Form.



When you add an email address and Save - QikBook sends an invitation email to that User that looks like this:



When the recipient clicks the "View" button, it will go to QikBook's sign in page.

As soon as the User signs up (or if they are already signed up), QikBook opens at their Bookings page - and the Listing Owner's Rooms are instantly displayed ready for the User to make bookings.

Currently, adding Users is done one by one for each Listing. Eventually, an import feature will be added to QikBook so you can upload your User List from other formats, address books, CSV files etc.

User label (company, org, group, tag)

This is optional and you can add a label to a User on your List at any time.

Adding a label is for internal Admin purposes. For example, you might want to label a User as a "member" or "external" or "staff" or a "company name" etc.

Why labels can be useful.

These labels display in the bookings in the Log, so you can filter bookings using a label (e.g. "Acme Co") which you may have applied to the Users from that company.

This can be useful to group bookings together in the Log which have been made by a company's staff, for example, when invoicing a company where all the staff of a company can book and hire your meeting rooms and you want to send a combined company invoice. You would:

1. filter the bookings for the "Acme Co" User label
2. the Log gives you a total net payment
3. export a PDF file (or CSV into a spreadsheet)
4. send invoice with exported file attached.

These User labels do not show in the User's Log - they only show in Admin's Log because their purpose is to help Admin manage their Log.

Admin can add multiple labels to a User. Admin can hover over the User's booked slot to see labels.

The User List

A Listing's User List has its own page in the app. This is where Users are added or deleted and User details are edited.

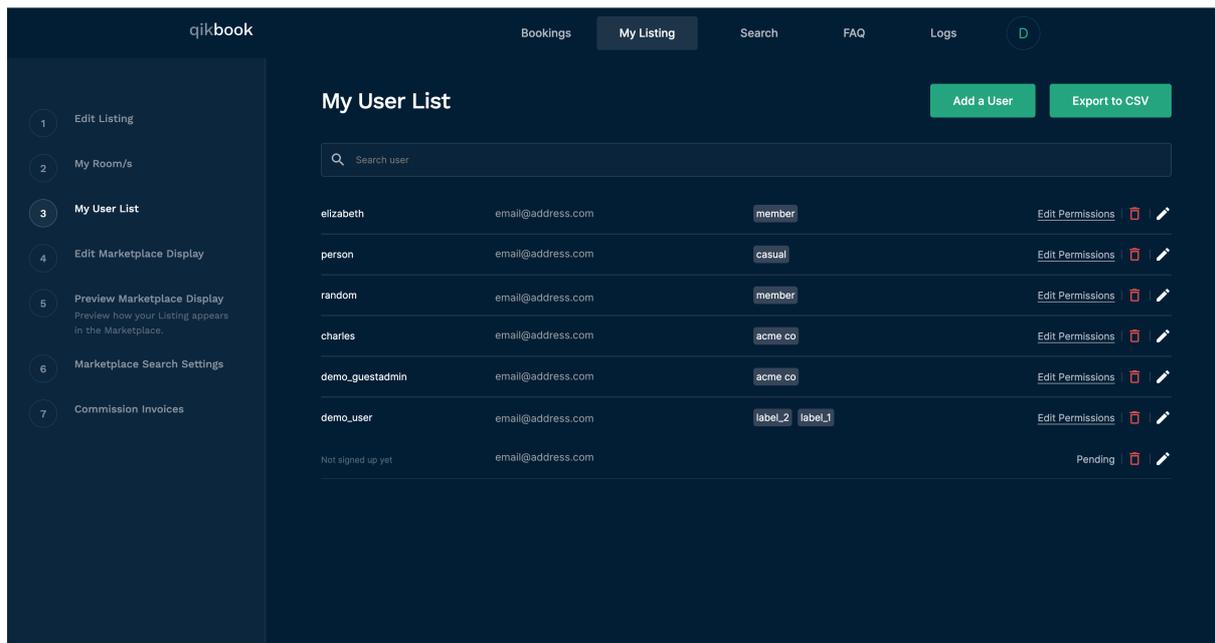
And it is where a User's Permissions Form is opened and their permissions edited.

A User with an "**Edit Permissions**" link indicates this User has signed up to their own QikBook app and your Rooms are already on their application.

Users who have not yet signed up to QikBook will show as "**Pending**".

The pencil edit icon opens the **Edit User Form** to add, delete or edit a **User's label**. You can not edit the User's email.

The red 'trash can' delete icon will instantly **delete a User** from your User List - meaning the User will no longer receive your Listing or Rooms in their application. But first, all and any forward bookings from the present time that are booked for that User must be cancelled before a User can be deleted.



Export to CSV

You can export the User List as a CSV file - which you might want to import to an email marketing application. The CSV fields include the User's username, email address and your user labels. The CSV file can be opened in most spreadsheet formats.

Pending

If the User is not yet signed up to QikBook they will appear in your User List as **"Pending"**. There will be no default permissions assigned until the User signs up and your Rooms appear in their app.

As soon as they sign up to QikBook - you will see "Pending" change to an **"Edit Permissions"** link.

Clicking that **"Edit Permissions"** link will open their User Permissions Form - and you can change their default permissions if you wish.

Delete User

The red trash can will delete a User from your List. However, you must cancel any forward bookings for this User if there are any, before you can delete them. Once deleted, they will no longer receive your Listing and Rooms to their application.

Edit User

The edit icon (pencil) will open the User Form for you to **edit the label**.

You cannot change their email address.

The username when a User signs up is derived from the email address of the User. It is made up of the characters before the "@" sign in their email address with a 24 character limit.

Username

Only the signed up User can edit their username. Whatever username they set for themselves, will appear in their App, and also in your App, as being the username for that User.

“Edit Permissions” link opens the User Permissions Form

After the User Signs Up to QikBook, they will instantly be assigned a User Permissions Form which will appear as an “Edit Permissions” link next to their name in the User List.

You can edit the permissions in this User Permissions Form at any time.

User Permissions Form

Permissions are just rules that can be applied as to how a User interacts with some object.

Permissions for Sarah [X]

Listing

 **Demo Listing**
200 Queen Street, Auckland CBD, Auckland 1010, New Zealand

User has access to my Listing

User is Guest Admin to my Listing

Rooms

 **Conference Room**

User can view this room and calendar

User pays hire fees for this room

User can make bookings for this room

User can cancel their own bookings for this room

Cancellation policies

Cancel any time - Full refund (if any)

Cancel by 5pm day before - Full refund (if any)

Cancel by 5pm day before - 90% refund

Cancel by 5pm day before - 50% refund

Some other applications assign permissions to a named role and then add a User to that role.

QikBook treats Users on a more individual basis.

Each User has their own set of permissions. These can be assigned between that User and each Room in the Listing and the Listing as a whole.

When a User is first added to a User List, they are assigned a pre-determined set of permissions (we'll call "default" permissions) for each Room - which can then be edited by the Owner at any time.

2 User Permissions for the Listing.

1. User has access to my Listing.

This allows the user to see the Listing. If this permission is unchecked, your Listing, and all the Rooms it contains, will disappear from the User's application.

This is a quick way to hide your Listing from a user on your List - without having to delete the User. However, the 'correct' way to remove a User is to cancel any forward bookings and delete them from your List.

2. User is Guest Admin to my Listing.

This permission assigns to the User all the same Admin functions that the Owner has. This User can do everything that the Owner can do, including but not limited to:

- add and edit Rooms
- add Users and edit their permissions
- delete Users
- cancel any booking
- make a booking or cancellation on-behalf of a User on the User List

If you un-check the Guest Admin permission, that User's permissions revert to the permissions assigned to them in their User Permissions Form.

The Guest Admin permission allows an Owner to assign full Admin role to any User on the List of any Listing they are Owner for - with a simple checkbox and save.

You can have multiple Guest Admins for a Listing and all will have the Admin role at the same time for that Listing.

4 User Permissions for each Room.

1. User can view this room and calendar.

If this is un-checked this Room will not appear in the User's app.

2. User pays hire fees for this room.

If this is checked the Hire Fees for this Room will be displayed and the User will have the calculated payment of hire fees for the booking saved to the Log.

If it is un-checked, no Hire Fees will be displayed in this Room card, and the bookings for this Room will show a \$0 hire fee if selected.

3. User can make bookings for this room.

This needs to be checked for the User to be able to make a booking. If it is un-checked, the “Book” button will not present itself and the User will not be able to book this Room. This is useful if you don’t want this User to make a booking but you want them to see their forward bookings still to be used.

4. User can cancel their own bookings for this room.

If this is un-checked, the User will not be able to cancel and if the User does want to cancel, they must ask Admin to cancel their booking. If the User selects the booking to cancel the “Cancel” button will render. If the User clicks the “Cancel” button a popup will let the User know they cannot cancel.

This option allows the Owner decide whether to cancel a booking or not. It also will allow the Owner to cancel according to the **Owner’s preferred cancellation policy**.

4 Built-in cancellation policies.

If “[] User can cancel their own bookings for this room” is **checked**, then one of QikBook’s 4 built-in cancellation policies will take effect when the User **cancels their own booking**:

- **Cancel any time - Full refund (if any)**
- **Cancel by 5pm day before - Full refund (if any)**
- **Cancel by 5pm day before - 90% refund (if any)**
- **Cancel by 5pm day before - 50% refund (if any)**

Cut off times.

If a User can cancel “any time”, this means they can cancel a booking up until the **start time of the first slot** in the booking.

Admin can cancel any booking up until the **start time of the last slot** in the booking.

The cut of time of “**5pm day before**” means the User must cancel by 5pm local time on the day prior to the date that the first slot in the booking is located. So, if a single booking spans 2 days, then the “cut off” time is 5pm the day prior to the **date of the first booked slot**.

If the User cancels before the 5pm cut off time, then the refund amount for that policy will be applied to the cancelled booking.

The refund might be 1) full refund, 2) 90% refund or 3) 50% refund.

A canceled booking in the Log might show a \$100 payment and a \$90 refund. The result will be a Net Payment calculated in the Log as \$10. This is effectively a “cancellation fee”.

If the User tries to cancel after the cut off time of 5pm day before - if that policy is in play - the User will be blocked from cancelling with a popup suggesting they contact Admin.

Keeping your own business’s cancellation policies.

The default permissions currently in place prevent a new User just added to your User List from cancelling their own bookings.

This means that by default the User has to ask the Owner to cancel their booking.

So, by default, the Owner can advise their Users what their cancellation policies are and make cancellations according to those policy rules.

Or, if QikBook's cancellation policies are preferred, these can simply be selected in the User Permissions Form and the User can cancel their own bookings according to the built-in cancellation policies.

The Log

Created	Listing	Rooms and time slots	Booked for	Booked by	Payment	Cancelled	Refund	Cancelled by
2024-07-18	Demo Listing	1 Meeting Room 2024-07-26 09:30:00 - 10:00:00	Support	Support	\$0.00	-	-	
2024-07-18	Demo Listing	1 Meeting Room 2024-07-19 13:30:00 - 14:00:00 1 Meeting Room 2024-07-19 14:00:00 - 14:30:00	Sarah	Support	\$60.00	-	-	
2024-07-18	Demo Listing	Conference Room 2024-07-19 13:00:00 - 14:00:00	jose	Support	\$0.00	✓	-	Support
2024-07-18	Demo Listing	1 Meeting Room 2024-07-19 12:00:00 - 12:30:00 1 Meeting Room 2024-07-19 12:30:00 - 13:00:00	Support	Support	\$0.00	-	-	
2024-07-18	Demo Listing	Conference Room 2024-07-19 08:00:00 - 09:00:00 Conference Room 2024-07-19 09:00:00 - 10:00:00 Conference Room 2024-07-19 10:00:00 - 11:00:00	Eric	Support	\$200.00	✓	\$200.00	Support
Total net payment amount					\$60.00			

Usually a Log is a backwards looking document. The QikBook “Log” records forward bookings as well. So it records all bookings. A booking is never deleted. When it is cancelled, it is merely marked as cancelled and remains in the database as a record.

So, the Log is a spreadsheet record of all the bookings and cancellations - past, present and future.

This might be named “Bookings” - but I prefer “Log”. Each Listing and each User has their own Log.

Every User has their **personal Log** containing all the bookings they have personally made on any Listing. Their personal Log will also contain any bookings made by Admin on their behalf.

The Log page always opens with the User’s personal Log selected for display. This button is top left.

If the User has their own Listing - or they are Guest Admin to a Listing - there **will be a separate Log for each of those Listings as well**.

If you select a Listing’s Log button at the top of the page - then that Listing’s Log will display all bookings made for any Rooms belonging to that Listing.

The Log has 3 **background colors** to help with a quick visual time line reference: grey for future bookings forward from today, navy for today’s bookings, and olive green for past bookings looking backwards from today.

You can **show or hide any Log columns** with Icon next to Search box top right.

Accessing Log data.

All the columns in the Log (dates, Rooms & slots booked, booked for, booked by, user labels, cancelled by, etc) can all be filtered. The text within the Log’s Comments column can be searched and filtered. And the entire Log can be searched for text.

The Log filtering logic works such that - for the all the bookings (Log items) that are displayed - all the selected **filter conditions across all columns will be true**. This makes for fast and fine grained filtering.

After you have filtered for the bookings that you want displayed, you can export those items into a CSV file and open it as an Excel spreadsheet, a Mac Numbers document or import those items into a Google Sheets document.

The CSV file is useful for importing into CRM and email marketing Apps.

Invoicing

An Owner can filter for a User (customer) and where payments are due, a **“Total net payments”** is displayed in the footer of the Log. This also displays in the PDF file.

The User in their personal Log can also filter for the invoice dates for that Listing, and see the same bookings and **“Total net payments”** amount. So the User can easily verify any invoice they have received.

Export to PDF

Id	Created	Listing	Rooms and time slots	Booked for	Booked for email	Booked by	Booked by email	Payment	Canceled	Refund	Cancelled by	Comments
921	June 10, 2024, 8:26 p.m.	None		Sarah	sarah@test.co.nz	Sarah	sarah@test.co.nz	\$ 30.00	Yes	\$ 30.00	Support	
929	June 13, 2024, 11:0 5 p.m.	Demo Listing	1 Meeting Room June 19, 2024 11:30 a.m. - noon	Support	support@qikbook.co m	Support	support@qikbook.co m	\$ 0.00	Yes	\$ 0.00	Support	
930	June 13, 2024, 11:0 6 p.m.	Demo Listing	1 Meeting Room June 20, 2024 11 a.m. - 11:30 a.m.	Support	support@qikbook.co m	Support	support@qikbook.co m	\$ 0.00	Yes	\$ 0.00	Support	Comment made here
933	June 13, 2024, 11:4 7 p.m.	Demo Listing	Conference Room June 20, 2024 11 a.m. - noon	Support	support@qikbook.co m	Support	support@qikbook.co m	\$ 0.00	Yes	\$ 0.00	Support	
936	June 13, 2024, 11:4 8 p.m.	Demo Listing	Conference Room June 21, 2024 noon - 1 p.m. Conference Room June 21, 2024 1 p.m. - 2 p.m. Conference Room June 21, 2024 2 p.m. - 3 p.m.	Support	support@qikbook.co m	Support	support@qikbook.co m	\$ 0.00	Yes	\$ 0.00	Support	
937	June 13, 2024, 11:4 9 p.m.	Demo Listing	Conference Room June 21, 2024 8 a.m. - 9 a.m.	Support	support@qikbook.co m	Support	support@qikbook.co m	\$ 0.00	Yes	\$ 0.00	Support	
938	June 13, 2024, 11:5 4 p.m.	Demo Listing	Conference Room June 21, 2024 11 a.m. - noon	Support	support@qikbook.co m	Support	support@qikbook.co m	\$ 0.00	Yes	\$ 0.00	Support	Post to Log
942	June 14, 2024, 1:04 a.m.	Demo Listing	Conference Room June 19, 2024 9 a.m. - 10 a.m.	Support	support@qikbook.co m	Support	support@qikbook.co m	\$ 0.00	Yes	\$ 0.00	Support	testing popup 2
943	June 14, 2024, 1:11	Demo Listing	Conference Room	Support	support@qikbook.co	Support	support@qikbook.co	\$ 0.00	Yes	\$ 0.00	Support	ON BEHALF TESTIN

The Owner can generate a PDF file of the bookings to attach to an invoice they might want to email to that User. The PDF file will include the calculated **“Total net payments”**.

Export to CSV

You can export the displayed bookings in the Log as a CSV file - which can be opened in other spreadsheet formats for invoicing and accounting or imported into a CRM application.

If a booking covers more than a single day - the **“date”** of that booking used by the app is the date of the last slot in the booking. And the **“precise”** time of that last Slot will be taken as the **“start time”** of that last Slot.

Here is a Log exported to a CSV file and opened in Excel spreadsheet.

ID	Created	Listing	Rooms and time slots	Booked for	Booked for email	Booked by	Booked by email	User labels	Payment	Cancelled	Refund	Cancelled by	Cancelled by email	Comments
4	July 11, 2024, 10:59 pm	Auckland Coworking	Meeting Room 1 - July 17, 2024 9:00 am - 10:00 am Meeting Room 1 - July 17, 2024 10:15 am - 11:15 am	support	support@qikbook.com	demo_owner	demo_owner@example.org	new_label	\$54.00	Yes	\$54.00	demo_owner	demo_owner@example.org	Test
5	July 11, 2024, 11:37 pm	Auckland Coworking	Meeting Room 1 - July 17, 2024 11:30 am - 12:30 pm	support	support@qikbook.com	support	support@qikbook.com	new_label	\$0.00	No	\$0.00			
6	July 12, 2024, 12:10 am	Auckland Coworking	Meeting Room 5 - July 19, 2024 2:15 pm - 3:15 pm	support	support@qikbook.com	support	support@qikbook.com	new_label	\$20.00	No	\$0.00			
7	July 12, 2024, 2:37 am	Auckland Coworking	Meeting Room 1 - July 12, 2024 3:30 pm - 4:30 pm	support	support@qikbook.com	support	support@qikbook.com	new_label	\$50.00	Yes	\$50.00	support	support@qikbook.com	
8	July 12, 2024, 2:37 am	Auckland Coworking	Meeting Room 3 - July 12, 2024 3:30 pm - 4:30 pm	support	support@qikbook.com	support	support@qikbook.com	new_label	\$18.00	Yes	\$18.00			Changed refund
9	July 12, 2024, 4:39 am	Auckland Coworking	Meeting Room 2 - July 17, 2024 9:00 am - 10:00 am	support	support@qikbook.com	demo_owner	demo_owner@example.org	new_label	\$51.00	Yes	\$31.00	demo_owner	demo_owner@example.org	Test on behalf - cancel on behalf
10	July 12, 2024, 4:40 am	Auckland Coworking	Meeting Room 2 - July 17, 2024 9:00 am - 10:00 am	demo_owner	demo_owner@example.org	demo_owner	demo_owner@example.org		\$0.00	Yes	\$0.00	demo_owner	demo_owner@example.org	
11	July 12, 2024, 4:40 am	Auckland Coworking	Meeting Room 2 - July 19, 2024 9:00 am - 10:00 am Meeting Room 2 - July 19, 2024 10:15 am - 11:15 am	demo_owner	demo_owner@example.org	demo_owner	demo_owner@example.org		\$0.00	Yes	\$0.00	demo_owner	demo_owner@example.org	
12	July 12, 2024, 5:40 am	Auckland Coworking	Meeting Room 1 - July 17, 2024 10:15 am - 11:15 am	demo_owner	demo_owner@example.org	demo_owner	demo_owner@example.org		\$0.00	Yes	\$0.00	demo_owner	demo_owner@example.org	
13	July 12, 2024, 5:40 am	Auckland Coworking	Meeting Room 1 - July 17, 2024 11:30 am - 12:30 pm	demo_owner	demo_owner@example.org	demo_owner	demo_owner@example.org		\$0.00	No	\$0.00			
14	July 12, 2024, 5:41 am	Auckland Coworking	Meeting Room 1 - July 25, 2024 10:00 am - 2:00 pm	demo_owner	demo_owner@example.org	demo_owner	demo_owner@example.org		\$0.00	Yes	\$0.00	demo_owner	demo_owner@example.org	
15	July 12, 2024, 5:41 am	Auckland Coworking	Meeting Room 1 - July 23, 2024 9:00 am - 10:00 am	support	support@qikbook.com	demo_owner	demo_owner@example.org	new_label	\$45.00	Yes	\$20.25	demo_owner	demo_owner@example.org	
16	July 12, 2024, 5:41 am	Auckland Coworking	Meeting Room 1 - July 25, 2024 10:00 am - 10:00 am	demo_owner	demo_owner@example.org	demo_owner	demo_owner@example.org		\$0.00	Yes	\$0.00	demo_owner	demo_owner@example.org	
17	July 12, 2024, 5:42 am	Auckland Coworking	Meeting Room 1 - July 25, 2024 11:30 am - 12:30 pm	support	support@qikbook.com	demo_owner	demo_owner@example.org	new_label	\$40.00	Yes	\$40.00	demo_owner	demo_owner@example.org	
18	July 12, 2024, 5:44 am	Auckland Coworking	Meeting Room 1 - July 26, 2024 9:00 am - 10:00 am	support	support@qikbook.com	demo_owner	demo_owner@example.org	new_label	\$56.00	Yes	\$33.60	demo_owner	demo_owner@example.org	
19	July 12, 2024, 5:46 am	Auckland Coworking	Meeting Room 2 - July 24, 2024 9:00 am - 10:00 am	support	support@qikbook.com	demo_owner	demo_owner@example.org	new_label	\$60.00	Yes	\$52.00	demo_owner	demo_owner@example.org	
20	July 12, 2024, 7:24 am	Auckland Coworking	Meeting Room 1 - July 26, 2024 10:15 am - 11:15 am	support	support@qikbook.com	demo_owner	demo_owner@example.org	new_label	\$40.00	No	\$0.00			
21	July 12, 2024, 7:25 am	Auckland Coworking	Meeting Room 2 - July 25, 2024 9:00 am - 10:00 am	demo_owner	demo_owner@example.org	demo_owner	demo_owner@example.org		\$0.00	No	\$0.00			Tiny slot request - cancelled on mobile
22	July 12, 2024, 7:30 am	Auckland Coworking	Room Tiny Slots - July 15, 2024 8:30 am - 8:45 am	support	support@qikbook.com	demo_owner	demo_owner@example.org	new_label	\$20.00	Yes	\$17.00	demo_owner	demo_owner@example.org	
23	July 12, 2024, 7:32 am	Auckland Coworking	Room Tiny Slots - July 15, 2024 8:15 am - 8:30 am	demo_owner	demo_owner@example.org	demo_owner	demo_owner@example.org		\$0.00	No	\$0.00			
24	July 12, 2024, 7:32 am	Auckland Coworking	Room Tiny Slots - July 15, 2024 8:30 am - 8:45 am	demo_owner	demo_owner@example.org	demo_owner	demo_owner@example.org		\$0.00	No	\$0.00			
25	July 12, 2024, 7:32 am	Auckland Coworking	Meeting Room 2 - July 15, 2024 9:00 am - 10:00 am	demo_owner	demo_owner@example.org	demo_owner	demo_owner@example.org		\$0.00	No	\$0.00			

Booking and cancelling

The Bookings page.

This is where booking and cancelling is done.

Room bookings are updated in the User's Booking page when: 1) app is opened, 2) page refresh, 3) booking or cancellation is made, 4) Listing is selected.

There are 4 scenarios: booking and cancelling as Owner or as a User.

- An Owner can book any of their own Rooms **either** for themselves **or** on-behalf of a User who is on their User List.

- The Owner can cancel any booking.

- A User with "can book" permission for a Room can select that Room and time slots and make a booking.

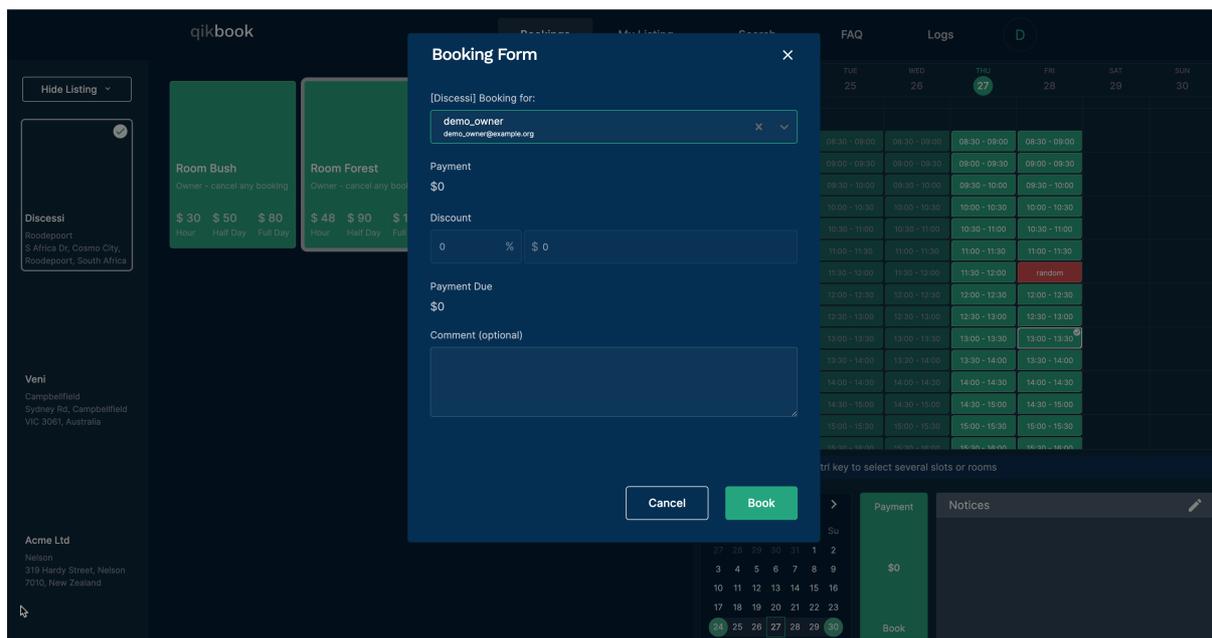
A User with "can cancel" permission for a Room can cancel their own bookings for that Room - according to the cancellation policy they have been assigned.

Admin booking one of their own Rooms.

When **Admin** selects their own Room and time slot - and clicks the Book button - instead of the booking going through instantly as it would for a User - a **Booking Form** appears which interrupts the process.

This Booking Form has the sole purpose of giving Admin **the option** of making this booking for themselves for their own purposes or on-behalf of someone else. The "someone else" must be on their User List, and the Booking Form has a dropdown list of all the Users on the Listing's User List.

Here is what the **Booking Form** looks like that Admin sees.



In the **Booking Form** the top input field has a label which says **[Listing name] Booking for:**

The input box **opens with** the Owner's username and email.

If Admin is making this booking for themselves, Admin simply goes ahead and clicks the green "Book" button at the bottom of the form. The booking will then be made for Admin as a normal User.

The **"Payment"** shows begins as \$0 because this is Admin - and Admin by default does not pay for booking one of their own Rooms.

So, to recap, if Admin is making this booking on their own behalf - when the Booking Form appears they simply click the "Book" button in the form.

The **Comment (optional)** is where Admin can make any notes that will be saved with the booking in the Log. They might be making a booking for someone outside the User List and can note that here.

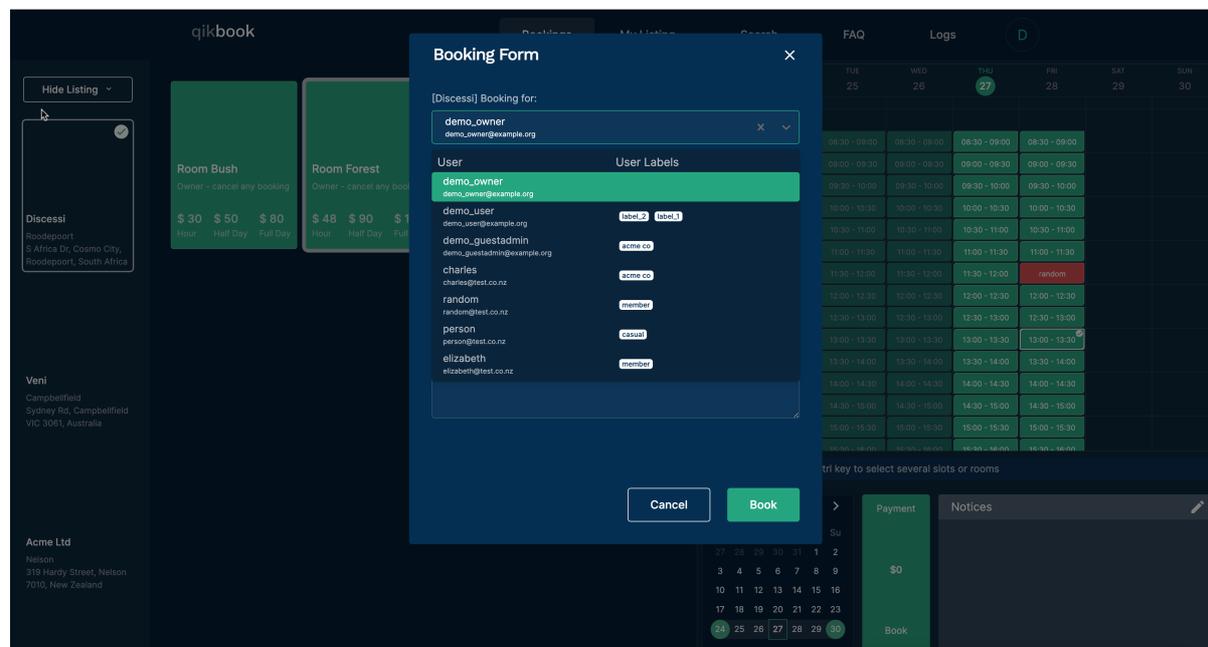
Admin booking on-behalf of a User - Booking Form

QikBook makes it fast and easy for a User to make their own bookings, but for many reasons it is often the case that a customer will ask Admin to make a booking on their behalf.

If Admin wants to make a booking **on-behalf** of one of the Users on their User List - Admin selects the Room and time slots as requested by the User - clicks the "Book" button - and the **Booking Form** appears.

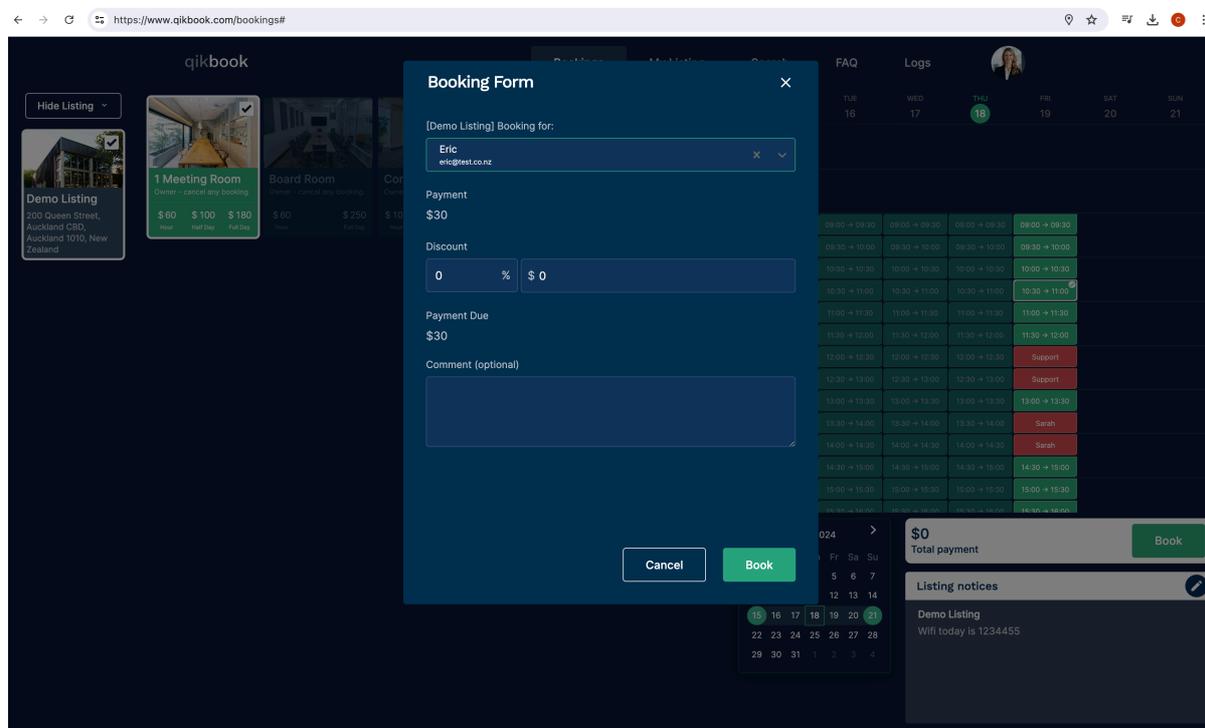
Then Admin will search the dropdown User List **[Listing name] Booking for:** for that User.

Here is what **searching and selecting a User** looks like.



Admin can find the User who is requesting the booking by **typing** into this input box - using the User's **username** or **email address** or **user label**

When the User is selected, the **hire fee for the booking will be calculated and appear in the form as a Payment amount**. If the User's Permission Form for the Room is that they do not pay a hire fee, the Payment amount will show \$0.



Admin can choose to discount the Payment amount.

Admin can also make a note in the Comment box - which is stored with the booking in the Log - and then "Book".

The only two people to see this booking in their Log, will be the "booked for" User who sees it in their personal Log, and the Owner who sees it in their Listing's Log.

Note: When Admin books on behalf of a User - their User Permissions are not applied. So, Admin has the ability to book any Room and apply any discount for any User on their List.

To recap, every time Admin makes a booking - the Booking Form will appear. Admin can book for themselves or on-behalf of a User on their List.

In the Log there is a "booked_for" column (User the booking is for) and a "booked_by" column - who will always be the Owner or Guest Admin.

Edge cases.

In the unlikely event that Admin selects multiple Rooms to book at once - with some Rooms from their own Listing and other Rooms from other Listings which they have been given booking access to - then no Booking Form will appear. This is because Admin can't book someone else's Room on-behalf of a User. Such a booking would go through as a regular User's booking.

Important note: whenever Rooms from different Listings are booked 'at once' in the same action as if a single booking - behind the scenes they are actually booked and posted to the Log as separate bookings - each Room booked under it's own Listing's Log. And they would have to be cancelled separately.

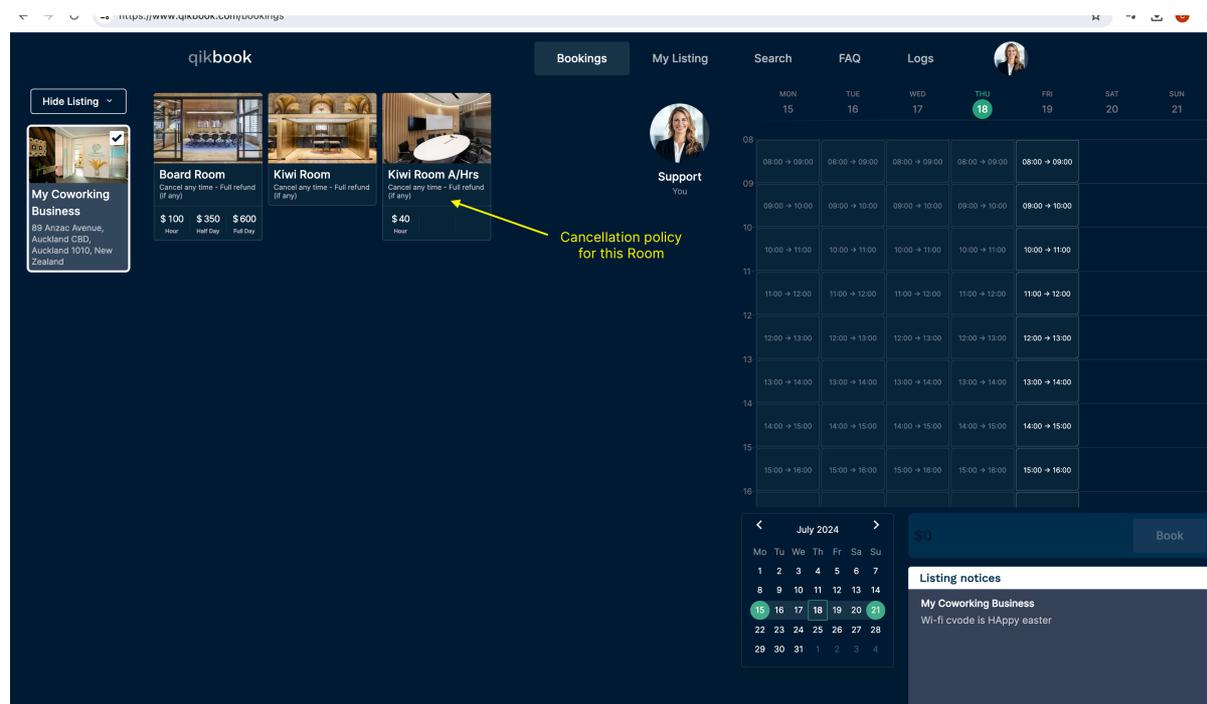
This allows Owners to always be in control of all bookings for Rooms on their Listings.

Users making their own bookings.

A User makes a booking by selecting a Room and time slots - then clicks the Book button.

However, each Room the User can see on their Bookings page comes with permissions set by the Owner.

In particular, the **cancellation policy in effect** is displayed in the Room card as text. The image shows here where the cancellation permission is displayed for the User to see.



There are 4 different cancellation policies that QikBook has **built-in** to the application that a Listing Owner can select from in the User Permissions Form - and each Room can have it's own cancellation policy.

In the image above, you can see each of the 4 cancellation policies have been assigned to 4 different Rooms for this particular User.

- **Cancel any time - Full refund (if any)**
- **Cancel by 5pm day before - Full refund (if any)**
- **Cancel by 5pm day before - 90% refund (if any)**
- **Cancel by 5pm day before - 50% refund (if any)**

The “5th” cancellation policy would be that the User has no cancellation policy - meaning the User “cannot cancel” the Room at all - which would mean that none of these 4 cancellation policies would be in force.

In that case, the cancellation policy in the Room card for the User to see would read:

- **Only Admin can cancel - by request**

In this case, if the User clicked the red “Cancel” button to cancel a booking they have made, a popup would advise them they cannot cancel and to contact Admin.

A User has 4 main permissions for each Room in a Listing.

These User Permissions set by the Owner are explained in the “3. Add a User Form” section. But let’s go through them briefly here as to how they affect a User making bookings and cancellations.

1. User can view a Room. This permission allows a Room to appear on a User’s booking page. If this permission’s checkbox is not checked, this room will not render in the User’s Bookings page.

2. User pays hire fee. This will ensure hire fees are displayed in the Room card to the User and the payment amount will be calculated for the time slots selected and the total will show next to the Book button where the User makes their booking.

If this permission’s checkbox is not checked, then the Room will not show Hire Fees in the Room card and payment will show in the Book button as \$0 to the User.

3. User can book a Room. If this permission is not checked, the User will not be able to make bookings. Even though they can select the Rooms and time slots, the Book button will not render. Admin can still make a booking for this Room on-behalf of the User.

This permission is useful when an Owner wants to prevent further bookings being made, but also want the User to see forward bookings they have yet to use.

4. User can cancel. If this is not checked, then the User will not be able to cancel and can only request Admin cancels their booking. The cancellation policy that is in effect for each Room is written into the Room card.

Username visibility.

When a User makes a booking, their username will appear in the time slot they booked. Admin can see that username. No other Users can see that User’s name. For other Users the slot will show the times as text e.g. 09:00 -> 09:30.

To cancel a booking.

The User who has made a booking can select a red Room and a red slot for that booking.

The Log is searched to find that booking - and the entire booking is instantly displayed in the booking page in a selected state - ready to cancel.

A click of the red Cancel button will cancel the booking.

When a booking is cancelled - it is not deleted. It simply is marked as cancelled in the Log and retained on the Log as a record.

Cut off times for cancelling.

Consider a Room booked for 2 time slots of 30 minutes each. The time slots are:

09:00 -> 09:30

09:30 -> 10:00

The User who has “Cancel **any time** - Full refund (if any)” permission for that Room, can cancel **up until 09:00** - the “start time” for the 1st time slot in the booking.

However, Admin can cancel that booking **up until 10:00** - the “end time” of the last slot in the booking.

Comments to the Log.

Admin has to opportunity to make a comment to the Log when making a booking or a cancellation.

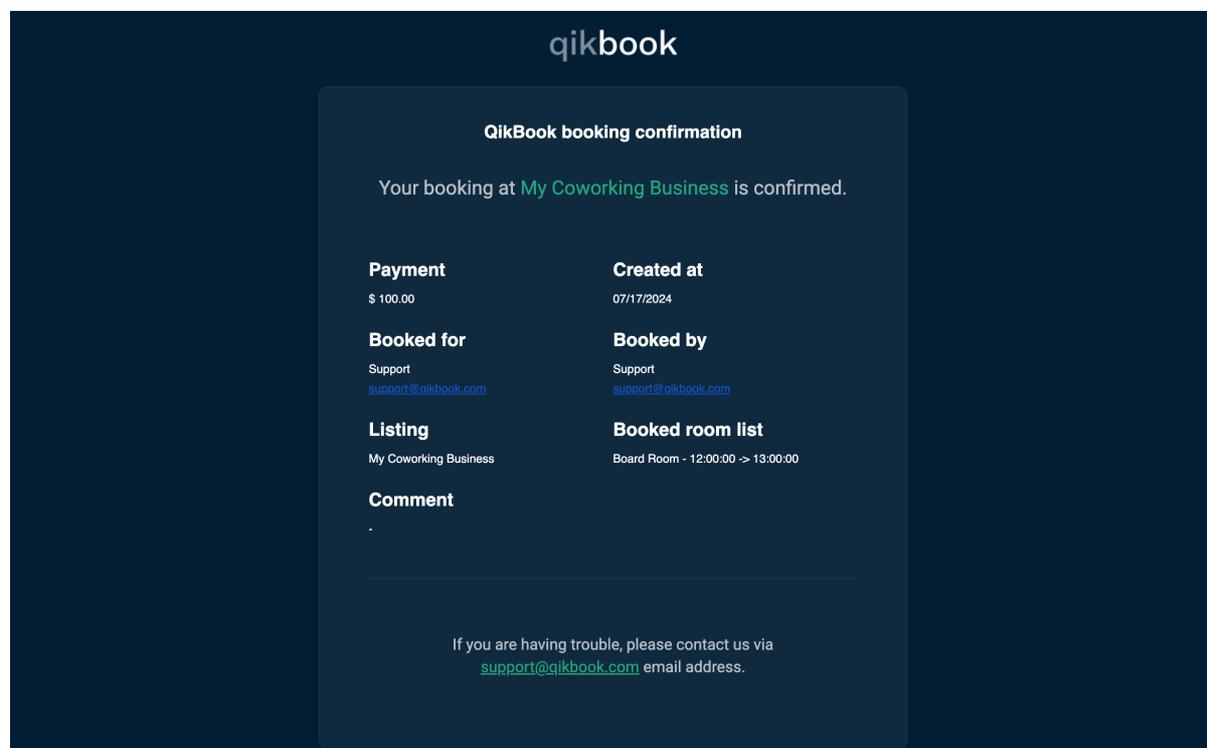
This is so that a note can be added to a booking or cancellation as a reference or reminder for any purpose, such as some special arrangement that has been agreed to by the Owner and User.

Comments will appear in the Log with the booking.

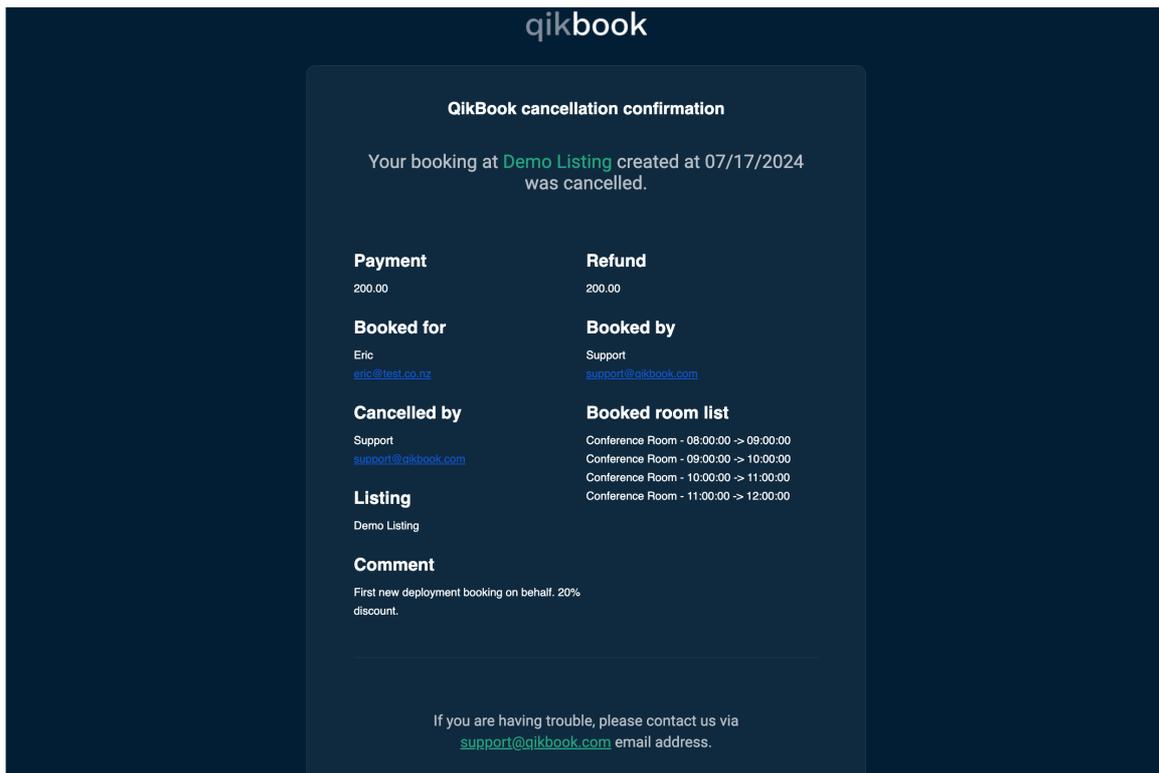
Only Admin and the “booked_for” User see the booking - and so **both** Admin and User see any comments added by Admin.

Email confirmation of bookings and cancellations.

For every booking made, a confirmation email for that booking is sent to the Listing Owner and the user who made the booking. Even if the booking is made by Admin on-behalf of UserA - the email goes to UserA.



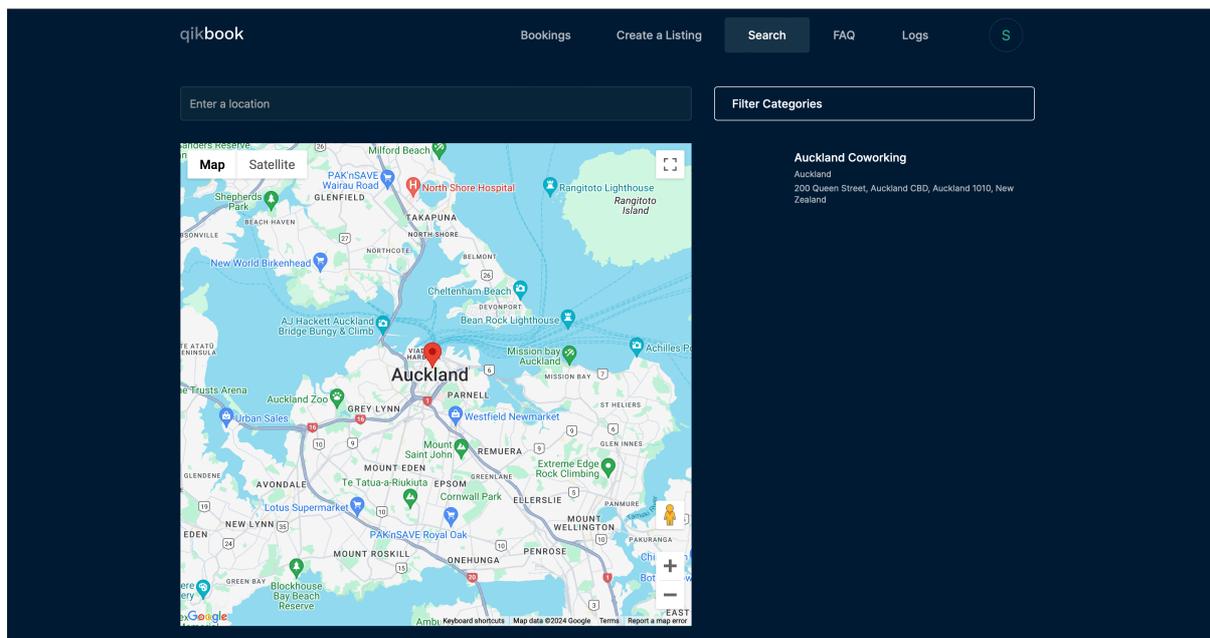
An email confirmation is also sent for every cancellation.



Search and the Marketplace

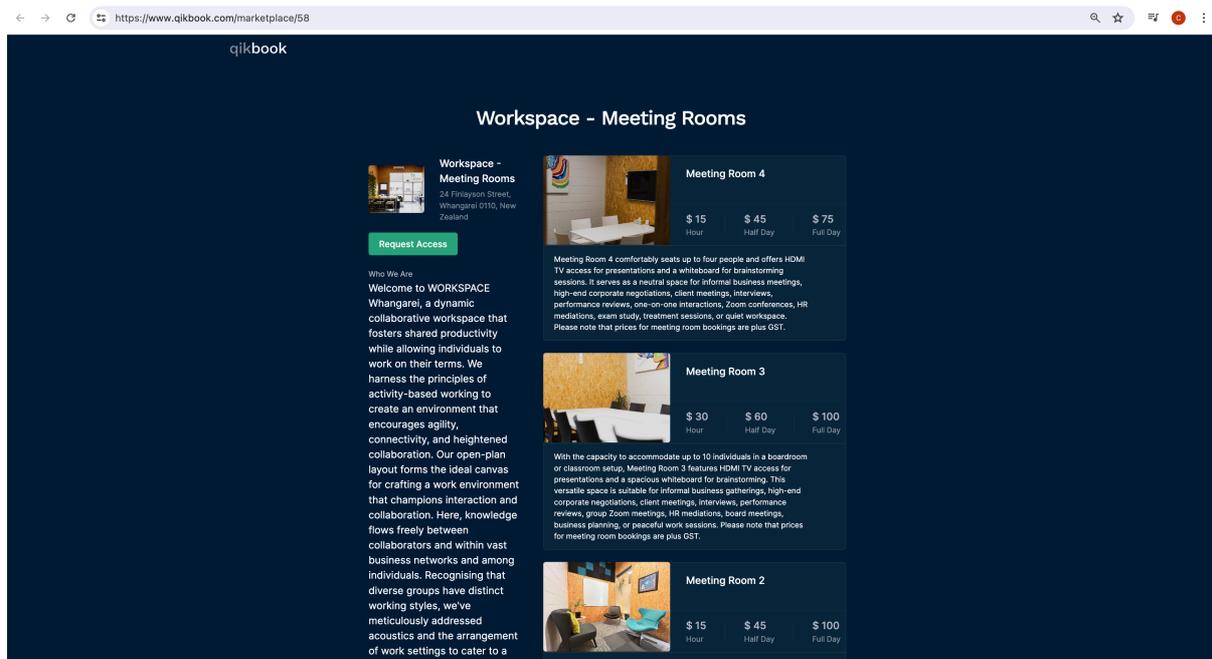
Search page.

Admin can have their Listing and Rooms visible on the QikBook Marketplace.



Here is an example of a Marketplace page opened from Search results in it's own tab.

The visitor can click the “Request Access” button to send an email to the Listing’s Admin - to ask for more information or **request to be given booking access**.

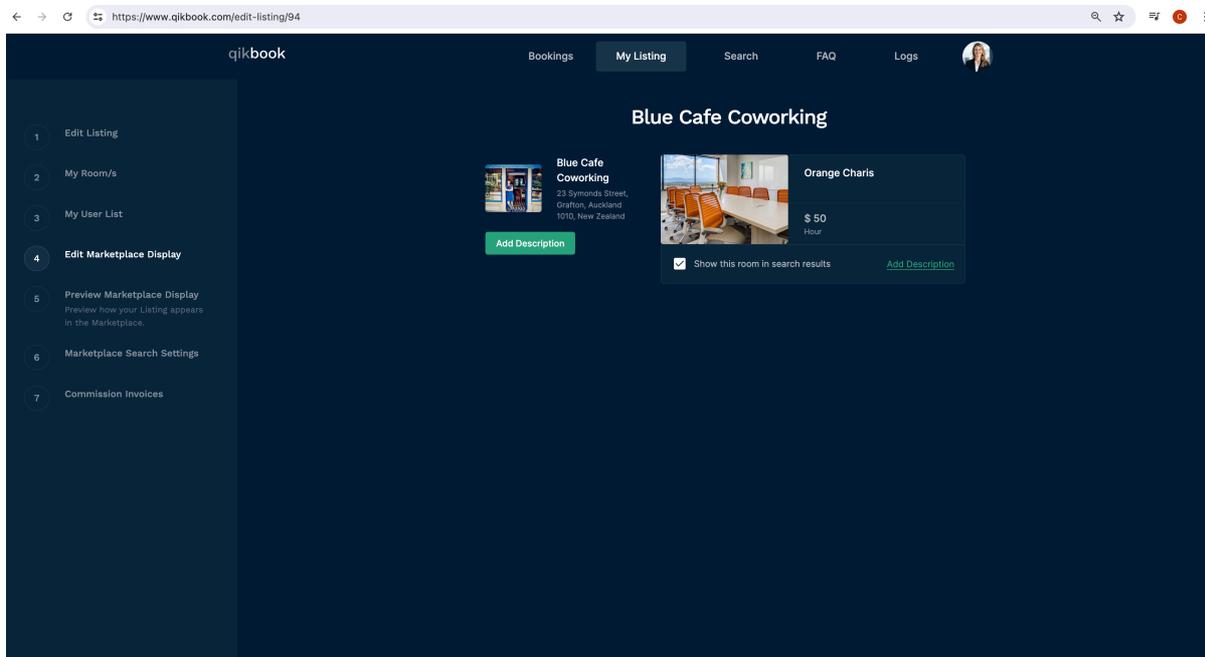


Note: **By default** a new Listing is **not** displayed on the Marketplace. This is because some Owner’s require that their Listings are to be private to the Owner and their User List.

See below “Marketplace Search Settings page” to see how to make a Listing visible to search results.

Edit Marketplace Display page

The Listing card and Room cards are included in the Listing's Marketplace page.



So, an Owner can open the Edit Marketplace Display page and add more information about the Listing and the individual Rooms that might be of interest to anyone searching for Rooms to hire.

Under the Room image there is an “Add Description” link which opens a form for text input. Here is where Admin can provide details specific to the Room.

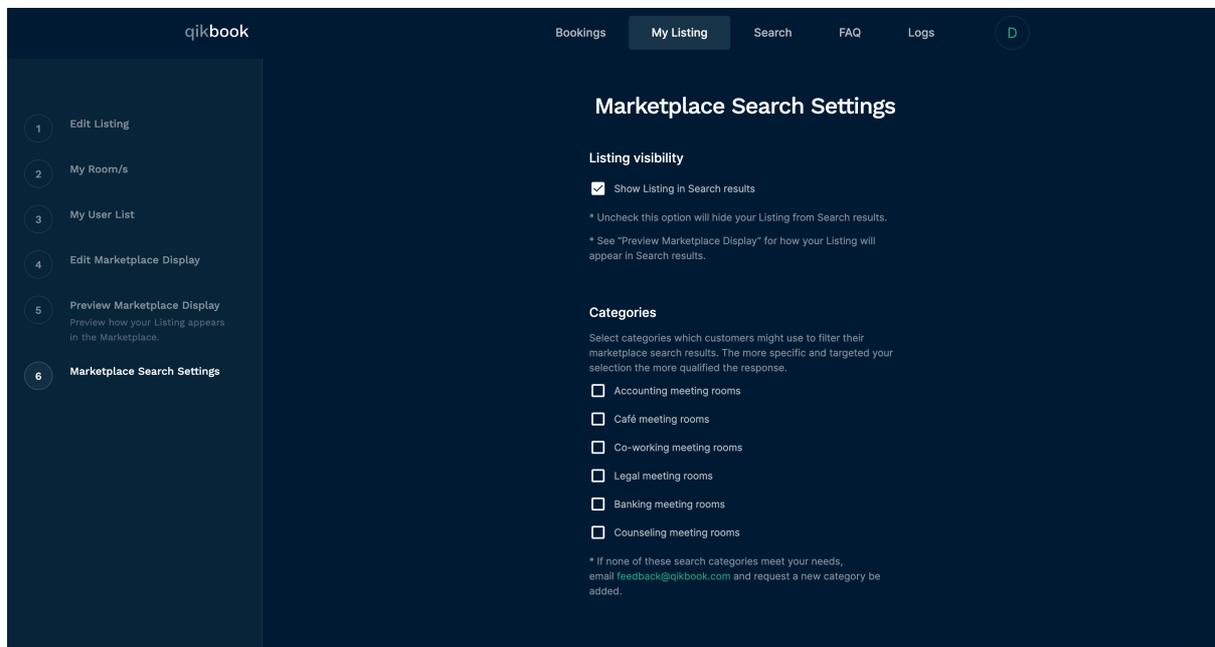
Under the Room image there is also a “[] Show this room in search results” checkbox. If checked, this room will be seen in the Marketplace Display page. This allows the Owner to choose which Rooms they want showing in the public facing Marketplace Display page you do want to display.

Preview Marketplace Display page

After descriptions have been added, Admin will want to preview what their Marketplace page will look like to the Marketplace. This page is purely for that purpose.

Marketplace Search Settings page

This page is where to check the “[] Show Listing on Marketplace” checkbox to have your Marketplace page display in Search results. In the page below, you can see that this Listing will show in Search results.



There are also a list of business categories you can select to help Marketplace visitors filter Search results for specific industries or professions.

FAQs

This is where short “How to” videos are found - linked from QikBook’s Youtube channel.

They are designed to answer short specific questions that someone wants a quick answer to.