

Hall Booking – Administrator Guide

Version 1.0

Maintained by Grant Stephen

System: WordPress – Hall Booking Plugin

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1. Locations

Open: Hall Booking -> Locations

- **Add a Location**

1. Click Add New (or the location create form on the page).
2. Enter the location name exactly as you want staff to use it.
3. Add address/details if the form provides them.
4. Save the location.
5. Confirm it appears in the locations list.

- **Edit a Location**

1. Find the location in the list.
2. Click Edit.
3. Update name and/or address details.
4. Save changes.
5. Check one booking form or booking editor page to confirm the location displays correctly.
6. Location Naming Rules (Important)
7. Keep naming consistent for CSV imports.
8. Avoid creating duplicate names that differ only by punctuation or spacing.

2. Rooms

Open: Hall Booking -> Rooms

- **Add a Room**

1. Click Add New (or use the room create form on the page).
2. Select the parent location.
3. Enter room name.
4. Set optional operational fields as needed:
5. Capacity
6. Colour (for calendar display)
7. Cost per hour
8. First 2 hours price
9. Hide from public (if available)
10. Save the room.
11. Confirm it appears under the correct location.

- **Edit a Room**

1. Find the room in the list.
2. Click Edit.
3. Update location assignment, name, colour, and pricing fields as required.
4. Save changes.
5. Validate on:
 - Hall Booking -> Calendar (colour and label)
 - Hall Booking -> Booking Editor (room appears under correct location)

Room Pricing Notes:

1. Cost per hour and first-2-hours settings affect booking cost calculations.
2. After major rate changes, review Hall Booking -> Rate History.
3. Run a test booking to confirm expected deposit and balance values.

Safe Change Workflow For Live Sites:

1. Export current bookings CSV as a backup.
1. Make the room/location change.
2. Create one test booking using the changed room.
3. Verify cost, calendar display, and booking editor filters.

3. Rate History

Open: Hall Booking -> Rate History

Changes are currently being implemented in this area

4. Groups

Open: Hall Booking -> District Groups

Use this page to manage the district or organisational groups used in group bookings.

- **Add A District Group**

1. Go to Hall Booking -> District Groups.
2. Click Add New or use the add-group form on the page.
3. Enter the group details:
 - Group name
 - Description
 - Group email

4. Discount percentage
5. Save the Group

- **Edit a District Group**

1. Find the group in the list.
2. Click Edit.
3. Update any of the following fields:
 - Group name
 - Description Group email
 - Discount percentage
4. Save Changes

5. Settings

Open: Hall Booking -> Settings

Settings are split into tabs.

- **Payment Settings Tab**

Contains:

1. Minimum Deposit Charge
2. Deposit Percentage

The Minimum Charge and Deposit Percentage settings work together to determine the actual deposit amount required at booking time

Global Group Discount (*The discount percentage applied to all District Groups*)

3. Enable/Disable District Credits (*When enabled, group bookings can use district credits instead of payment.*)
4. District Credit Limit (*Annual credits allocated to each district group when credits reset on 31 March.*)
5. Terms and Conditions URL (*Full URL to your terms and conditions page. This link will appear in the booking form.*)
6. Last Booking Day (*Last date customers are allowed to make bookings. Leave empty to allow bookings indefinitely.*)
7. Admin Notification Email (*Email address to receive notifications when deposits and balance payments are made. Leave empty to disable admin notifications.*)
8. Success Redirect URL (*URL to redirect users after successful booking payment. Leave empty to stay on the same page.*)

9. Deposit Payment Page (*Select a page to use for deposit payments. The page should contain the [hall_booking_deposit_payment] shortcode. Leave as default to use the built-in payment page.*)
10. Balance Payment Page (*Select a page to use for full payments (admin-created public bookings). The page should contain the [hall_booking_full_payment] shortcode. Leave as default to use the built-in payment page.*)

- **Full Payment Page**

Page selection notes:

1. Custom payment pages should contain the matching shortcode:
2. Deposit page: [hall_booking_deposit_payment]
3. Balance page: [hall_booking_balance_payment]
4. Full payment page: [hall_booking_full_payment]

- **Stripe Integration Tab**

Create via Stripe account.

Contains:

1. Publishable Key
2. Secret Key
3. Capture Behaviour
 - automatic
 - manual

- **Email Settings Tab**

Contains:

1. From Email Address (*Email address to use as the sender for booking emails. Leave empty to use the site admin email.*)
2. Volunteer Notification Email (*Email address to receive notifications when volunteers sign up or reset for opening/closing the hall. Leave empty to use the site admin email.*)
3. Rich-text templates for:
 - Deposit Payment
 - Balance Payment
 - Full Payment
 - Booking Details
 - Cancellation
 - Volunteer Cancellation
 - Group Booking

- Volunteer Weekly Summary

Use placeholders exactly as documented in each template section.

- **Unavailable Dates Tab**

Use this tab to block dates by room or for all rooms.

Fields:

1. From date
2. To date
3. Description
4. Room selection

5. Bookings

- **Create A New Booking**

Go to Hall Booking -> Booking Editor.

2. Leave the booking ID blank (it will auto-assign on save).
3. Enter customer details:
 4. Customer Name
 5. Email Address
 6. Contact Phone (optional)
7. Select booking type:
 - Regular (standard regular booking)
 - Group (uses a district group and applies group discount)
 - Public (admin-created public booking)
8. If Group booking, select the district group from the dropdown.
9. Set the event details:
 10. Select Location
 11. Select Room (filtered by location)
 12. Start Date and Time
 13. End Date and Time
14. Review the calculated cost and deposit (shown on save or based on settings).
15. Adjust pricing if needed:
 16. Discount Percentage (if applicable)
 17. Deposit Amount (will update balance due)
18. Optional: Add a group name for group bookings or internal reference.
19. Check optional flags as needed:
 20. Invoice Required (if no online payment should be sent)
 21. Disable First 2 Hour Charge (if applicable)

22. Require Hall Opener (if volunteer opener is needed)
23. Mark Deposit as Paid (if paid by other method)
24. Mark Balance as Paid (if full balance is paid)
25. Set the booking status:
 - pending (default)
 - confirmed
 - cancelled
26. Add any additional notes.
27. Click Save Booking.

- **Edit An Existing Booking**

1. Go to Hall Booking -> Bookings.
2. Find the booking and click Edit, or go directly to Booking Editor and select the booking ID.
3. Update any field (customer details, dates, room, pricing, flags, status).
4. Click Save Booking.
5. Check Bookings list to confirm the updated booking.