

Database User Guide

In this User Guide, the arrow (>) symbol means 'drill down'. For example, if a user is required to open the File menu and select New Document, this would be written as "Select File > New Document".

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Logging in and Registering

Starting the database.

On the desktop of your computer, double click the Breakaway Database icon.

-or-

Open Google Chrome, and enter the following address:

<http://db.breakawaysupportedholidays.co.uk/>

Registering New Users

Start the database and on the Login screen, click Sign Up at the bottom.

Enter the details and press Register.

Shortly you will receive an email from the system, inside the email is a long link under the header “Click this link to confirm your account and finish the registration:”. Click the link and then log into the system.

Note: You will not be able to log in until the link in the email has been clicked.

If you receive the message “Your account must be approved by an administrator.” then you must speak to a database administrator and ask them to follow the steps in Approving New Users.

Approving New Users

Log in as a user with an administrative account

Select System Maintenance > Users

Locate the user who needs to be approved and click the pencil icon on the left hand side.

Alter the User Type field to “Admin”. Press Save. The user may now log in.

Note: At this time, it is recommended to make all users Admin, and not any of the other options.

Forgotten Password

On the Login screen, click Forgotten Password? at the bottom of the screen, and follow the steps.

The system will send an email with a link to reset the password.

Logging Out or Changing Password

At the top right of the screen is a box showing the current user name.

Click the user name and in the menu which appears, select Log Out or Change Password as required.

General Use of the System

Using List Pages

List pages on this system generally show the first twenty records by default.

At the top right of the data table displays the current range of records being shown (1-20 or 2496) in this case and a drop down menu which allows this number to be altered. Note that changing to a large number (or all records) may take a long time to fetch the records!

Displaying 1 - 20 of 2496 20

	<u>Name</u>	<u>Deceased</u>	<u>Deleted</u>
	Smith, Carol	<input type="checkbox"/>	<input type="checkbox"/>
	Martin, Nicola	<input type="checkbox"/>	<input type="checkbox"/>

To scroll through the records and use the page buttons or the First, Last, Previous & Next buttons which appear as required:

1	2	3	4	5	6	7	8	9	10	Next	Last
---	---	---	---	---	---	---	---	---	----	------	------

Editing or Viewing a record

Locate the record you want to edit or view.

	<input type="checkbox"/>	Bookings	Mr Robert Norrington 1 Nalla Gardens Chelmsford Essex CM1 4AU	Norrington, Robert	<input type="checkbox"/>	<input type="checkbox"/>
--	--------------------------	----------	---	--------------------	--------------------------	--------------------------

Click either the pencil icon to edit the record, or the magnifying glass to view the record (read-only).

See **Using Edit Pages** for more details of editing records.

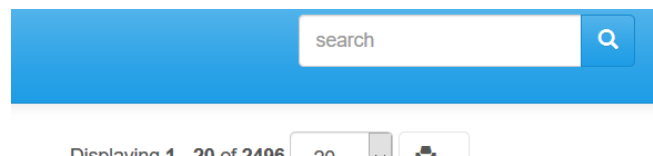
Searching for a Record

There are two ways of searching for a record.

1. Quick search
2. Advanced search

Quick search

At the top of the screen, locate the Search field:

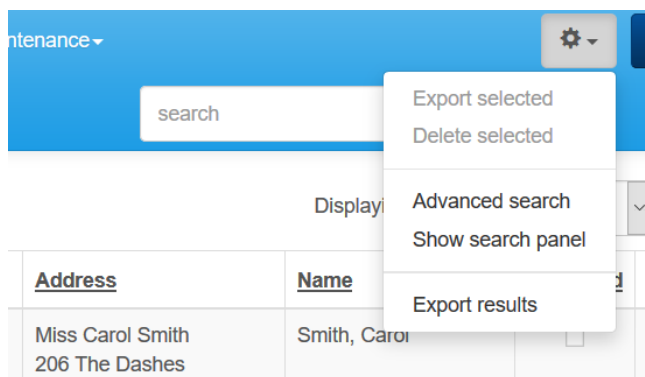


Displaying 1 - 20 of 2406

Enter the search terms and press enter or click the magnifying glass. After a moment the search results will appear in the list page below.

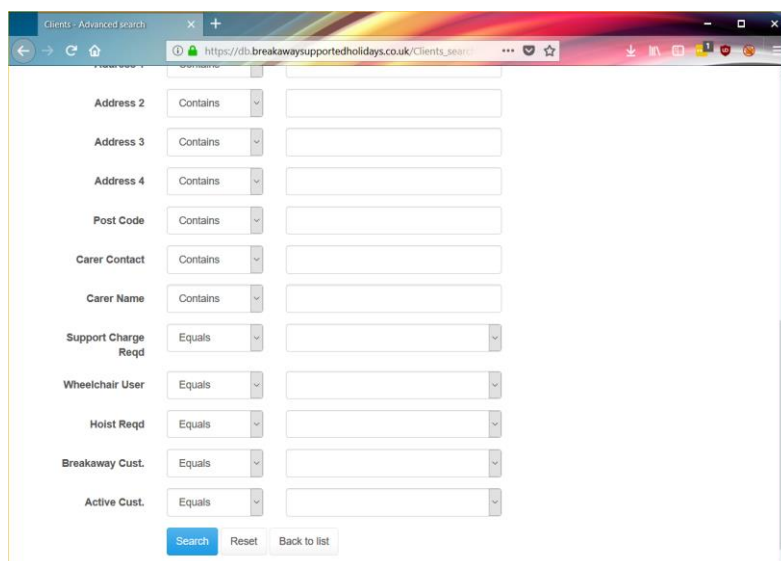
Advanced Search

Click the Cog icon at the top right of the screen and select Advanced Search.



Address	Name
Miss Carol Smith 206 The Dashes	Smith, Carol

You can then enter search terms for individual fields and press Search to carry out the search.



Address 2 Contains

Address 3 Contains

Address 4 Contains

Post Code Contains

Carer Contact Contains

Carer Name Contains

Support Charge Req'd Equals

Wheelchair User Equals

Hoist Req'd Equals

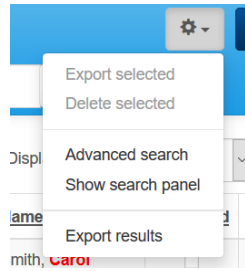
Breakaway Cust. Equals

Active Cust. Equals

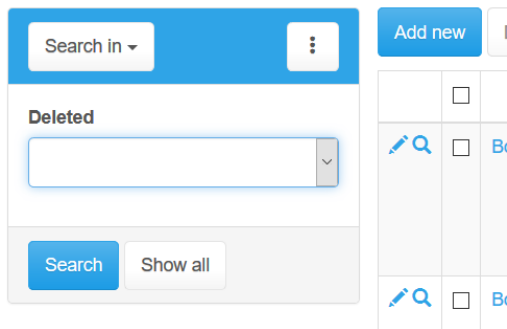
Search Reset Back to list

Removing the search

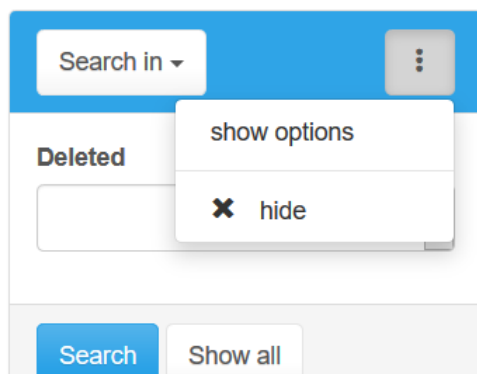
To return to the full list of records, select the Cog icon and choose Show Search Panel



Then on the search panel which appears at the left of the screen, click “Show All”



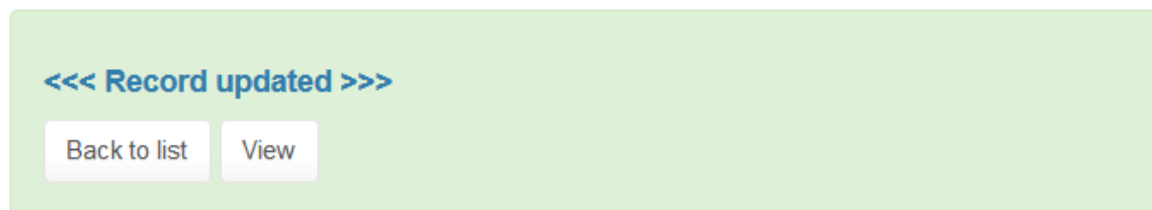
Optionally you may then hide the search panel again, by clicking the “...” icon and selecting “hide”



Using Edit Pages

Enter the data as required and press “Save” at the bottom of the screen to save the record.

You will then receive a message like this if the save was successful:



Press “Back to list” to return to the previous page, or “View” to view a read-only copy of the page (for example to manually confirm the change has been entered).

If any problems have occurred, the message should describe the issue (for example a mandatory field has been left blank). Normally the field with problematic contents will also be highlighted in red. Correct the issue then press Save.

To cancel the changes, rather than pressing “Save”, simply press “Back to list”

Tabs

Some edit screens with a lot of fields have a ‘tabbed’ display. For example, the line reading ‘Info’, ‘Address/Tel’... in this screen capture:

Clients, Edit [1]

Customer

Title

Miss

Forename

Carol

Surname

Smith

Telephone

01279 321159/ 07947835797

Email

Info
Address/Tel
Carer
Requirements/Charges
Bookings
Invoices

Send Brochure?

☐

Send Brochure By Email?

☐

Deceased

☐

Notes

please send the balance to -
 Essex Guardians
 PO Box 4
 County Hall

(continues)

You may click each of the items to open the appropriate section:

Info

Address/Tel

Carer

Requirements/Charges

Bookings

Invoices

Send Brochure?

☐

Send Brochure By Email?

☐

Deceased

☐

Notes

please send the balance to -
Essex Guardians
PO Box 4
County Hall

Info

Address/Tel

Carer

Requirements/Charges

Bookings

Invoices

Address 1

206 The Dashes

Address 2

Harlow

Address 3

Essex

Address 4

Post Code

CM20 3RT

Info

Address/Tel

Carer

Requirements/Charges

Bookings

Invoices

Carer Contact

07947835797

Carer Name

shelly

Carer Email

Clients and Bookings

This section shows you how to view users and their bookings for cases where you know which client you are working with.

Viewing A Client and Their Bookings

On the main menu bar at the top of the screen, click Clients > Clients


The first twenty records from the full list of clients will be displayed.

To find a particular client, enter their name or some other detail in the search box at the top right and press enter. See **Searching for a Record** for more details.

You can see and add to the list of bookings that a particular client has, by clicking the “Bookings” link on a particular client’s record.

	<input type="checkbox"/>	Bookings (7)	Miss Carol Smith 206 The Dashes Harlow Essex CM20 3RT	Smith, Carol	<input type="checkbox"/>	<input type="checkbox"/>
---	--------------------------	---------------------	---	---------------------	--------------------------	--------------------------

This will expand the “Bookings” tab.






☐
[Bookings \(7\)](#)

Miss Carol Smith
206 The Dashes
Harlow
Essex
CM20 3RT

Smith, **Carol**
☐
☐

[Bookings](#)

Add
Delete

<input type="checkbox"/>	<u>Holiday</u>	<u>Client</u>	<u>Notes</u>	<u>Cancelled</u>
 <input type="checkbox"/> Transactions (1) Invoices & Documents	1817	Smith, Carol		<input type="checkbox"/>
 <input type="checkbox"/> Transactions (3) Invoices & Documents	1853	Smith, Carol		<input type="checkbox"/>
 <input type="checkbox"/> Transactions (1) Invoices & Documents	1804	Smith, Carol		<input type="checkbox"/>
 <input type="checkbox"/> Transactions (1)	1833	Smith, Carol		<input type="checkbox"/>

From here we can use the Edit/View (pencil/magnifying glass) icons to edit or view those particular bookings, or we can add a new one by pressing Add.

A page to add the new booking record will be displayed, already filled in with the selected user:

Bookings, Add new

[Back to Clients](#) **Clients [1]**

Address	Name	Email	Carer Email	Deleted
Miss Carol Smith 206 The Dashes Harlow Essex CM20 3RT	Smith, Carol			<input type="checkbox"/>

Holiday * [Select](#)

Client * Smith, Carol

Pickup Time

Save **Cancel**

After pressing “Save” you will be returned to the list of bookings, but the new item should appear on the list (highlighted in green).

Also on the bookings screen, you can click the “Transactions” or “Invoices & Documents” links to see the transactions or documents for that particular booking:

Bookings

Add **Delete**

	Holiday	Client	Notes
<input type="checkbox"/>	1817	Smith, Carol	

[Transactions \(1\)](#) [Invoices & Documents](#)

Transactions **Invoices & Documents**

Add **Delete**

	Name	Hol. Code	Amount Paid	Transaction Date	Reason for Payment	Paymer
<input type="checkbox"/>	Smith, Carol	1817	755.00	09/05/2008	balance	

You can then add, edit or view records in the same way as normal using the Add, pencil or magnifying glass icons.

Holiday-centric Booking View

If you know which holiday, but not which client, you may view the bookings via the Holidays screen.

Select Holidays > Holidays from the main menu.

Then find the desired holiday, by browsing or using the holiday code or details in the search box.

A search bar with a blue background. The text 'B2057' is entered in the search field. To the right of the search field is a magnifying glass icon. Below the search field, the text 'B2057' is displayed in a separate box.

You will then see the Holiday record. A holiday has a number of bookings attached. These may be viewed by clicking the Bookings link:

<input type="checkbox"/>		<u>Code</u>	<u>Type</u>	<u>Leaving Date</u> ↓	<u>Duration</u>	<u>Cost</u>	<u>Places</u>
	<input type="checkbox"/>	Bookings (5)	B2057	Herly France - New Year in Herly	30/12/2018	4	999.00
		Itinerary					

[Bookings](#)

[Itinerary](#)

Add

Delete

<input type="checkbox"/>		<u>Holiday</u>	<u>Client</u>	<u>Notes</u>	<u>Cancelled</u>	
	<input type="checkbox"/>	Transactions (1)	B2057	Uphill, Stuart	<input type="checkbox"/>	
		Invoices & Documents				
	<input type="checkbox"/>	Transactions (1)	B2057	Daffin, Colin	<input type="checkbox"/>	
		Invoices & Documents				
	<input type="checkbox"/>	Transactions (1)	B2057	Manners, Kelly	<input type="checkbox"/>	
		Invoices & Documents				
	<input type="checkbox"/>	Transactions (1)	B2057	Scott, Philip	Birthday discount applied as per flyer	<input type="checkbox"/>
		Invoices & Documents				
	<input type="checkbox"/>	Transactions (1)	B2057	Chandler, Lisa		<input type="checkbox"/>
		Invoices & Documents				

Itineraries

Itineraries are created using the Itinerary tab on the Holiday Screen. Locate the holiday, then select the Itinerary link.

<input type="checkbox"/>		<u>Code</u>	<u>Type</u>	<u>Leaving Date</u> ↓	<u>Duration</u>	<u>Cost</u>	<u>Places</u>	
	<input type="checkbox"/>	Bookings (5)	B2057	Herly France - New Year in Herly	30/12/2018	4	999.00	7
		Itinerary						
		Bookings	Itinerary					
		Add						

(continues)

Next, press Add on the Itinerary tab (note: not Add New elsewhere on the screen), followed by Save.

The system will generate the Itinerary and a new record (highlighted in green) will appear. This is a PDF containing the itineraries for all clients on this holiday.

The screenshot shows a table with columns: Code, Type, Leaving Date, Duration, Cost, and Places. A booking with Code B2057, Type Herly France - New Year in Herly, Leaving Date 30/12/2018, Duration 4, Cost 999.00, and Places 7 is highlighted. Below the table, there is a section for 'Bookings (5)' and 'Itinerary (1)'. The 'Itinerary' tab is selected, showing a list of itineraries. One itinerary is listed with 'Date Created' 17/06/2018 12:18:15 and 'Document' Itinerary.pdf. The document is highlighted in green.

To view or print the itineraries, click Itinerary.pdf and it will open in a PDF viewer. Selected pages or the entire document may then be printed.

Once the itineraries have been viewed or printed, they should then be deleted by ticking the white box next to the Date Created, then pressing Delete. (They may be recreated at any time by following the above process again).

Itinerary Notes

There is a new “Itinerary notes” field which allows the user to enter notes which will appear at the bottom of the itinerary. This is specific to each booking (i.e. it allows individual notes for each client).

This may be entered by switching to the Bookings tab (see above screenshot, next to Itinerary tab) and pressing edit (pencil icon) on a particular booking and then scrolling down to the “Itinerary Notes” field, entering text then pressing save.

The screenshot shows the 'Bookings, Edit [7833]' form. The form has fields for 'Insurance Owed' (0.0000) and 'Insurance Paid' (0.0000). Below these are two text areas: 'Itinerary Notes' and 'Notes'. The 'Itinerary Notes' field is highlighted. A note explains: 'Notes entered here will appear on the customer's itinerary'. The 'Notes' field is for 'Notes for office use, not shown on itinerary'. At the bottom of the form are 'Save' and 'Cancel' buttons.

