



help



report



time



booking



control

# Manual

Artologik®  
EZ-Order

Plug-in for EZbooking version 3.2

## Artologik® EZbooking and EZ-Order

EZbooking, your web based application for the reservation of rooms and objects, can now be customised by adding one or several plugins. EZ-Order is an add-on function for placing orders, both separate orders and orders connected to reservations in EZbooking.

### The Advantages of EZ-Order are Numerous:

Since EZ-Order is an add-on function to EZbooking it is very easy to add it to you current EZbooking installation. You can enter all kinds of articles to order separately or in connection to making a reservation in EZbooking. Coffee, tea and sandwiches are typical articles in EZ-Order but why stop at food and beverages? It can also be used for things like stationary, brochures, golf clubs or whatever you have the need for. It depends on what you administrate in you booking system and what other orders you handle that could be managed in EZ-Order.

You add different "price lists" for different types of deliverance and connect products to these price lists. To place an order in EZ-Order you can either enter via the link "Order" in the right hand menu or by clicking the symbol next to a booking in EZbooking and thereby connect the order to the booking. In the report section you can extract details and reports over specified information on orders during specific time periods. This can be used for invoice details or other statistical purposes.

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## Ordering

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Orders can be placed either in connection with a booking or separately via the "Order" menu option. Exactly what you will be able to order is up to the administrator, who registers products and prices. Other users can, in addition to making their own orders, be given the right to handle orders and deliveries in EZbooking. See "Administrate order" below.

### Place an Order when Making a Booking

Make a booking in the calendar in the normal way. When the booking has been made, a symbol is displayed to the right of the booking. If an order has already been made for this booking, a figure is displayed next to the symbol. This figure indicates the number of orders that are linked to this booking.

1. Click the Order symbol to place an order. A page where you can place your order is displayed in the booking window.
2. Enter number of guests, time and types of delivery. The delivery date is automatically set to the date of the booking.
3. You can, if you want to, state the names of the guests and on whose behalf the order is placed. (A user who has the right to administrate orders can place an order for a booking made by another user.) Click "Next".
4. Enter the quantity you want of each product.
5. If you should want to, you can enter a message to the supplier. This page can later be used by the supplier to enter a comment and indicate if there is an additional cost if you have expressed any special requests in your message. Click "Next".
6. A confirmation of your order is now displayed, together with your order number. When you have made sure everything is correct you can click on "Order". If the administrator has entered an e-mail address for the selected type of delivery, an e-mail with order information will be sent to the registered address.
7. The number of orders for the booking is now displayed in brackets to the right of the booking concerned.

### Place an Order when Making a Recurrent Booking

Recurrent orders connected to recurrent bookings are easiest made in connection to registering the recurrent booking. To place orders on only some of the reservations within the recurrent booking, enter via the calendar on the specific dates of the booking. To place one or several orders while making a recurrent booking you click the link "place order" on the bottom of the page. Place your order. If there are previously placed orders in connection to the booking, a list of these orders is displayed. Click the link of the order to edit an existing order and the link "Place order" to place another order.

1. Enter number of guests, time and types of delivery.  
The delivery date is automatically set to the date of the booking.
2. You can, if you want to, state the names of the guests and on whom the order is placed. (A user who has the right to administrate orders can place an order for a booking made by another user.) Click "Next".
3. Specify the quantity wanted of each product.
4. If you want to, you can enter a message to the supplier. This page can also be used by the supplier to enter a comment and indicate if there will be an additional cost if you, for example, have expressed special requests in your message. Click "Next".
5. A confirmation of your order is now displayed together with the order number. Make sure the information is correct and click "Order".
6. You may now close the browser window. The order will be available in the system first after you have completed and registered the recurrent booking the order is connected to.

## Place a Separate Order

Click the "Order" option in the right-hand menu. The program displays the same page as when you place an order in connection with a booking. Follow steps 2-6 above to place your order.

## View and Edit Your Orders

You can view all your orders for a certain time period on the "Edit" page. If you want to view another period, go to the To and From selection lists at the top of the page, change the dates and click "View". You can change the sorting order of the list by clicking the column headings. The administrator can either view the orders of all users, or only his/her own.

1. Click on the menu "Order" and then on the sub-menu "Edit" and find the order you want to modify.
2. To edit an order, click on the date of the order to display its information.
3. Make the desired changes on the "Basic Information" page, then on the "Price list" page and finally confirm by clicking "Order" on the "Confirmation" page. You can edit an order up to the day before the delivery date. After this point in time, the order can only be edited by the administrator or by users who were given the right to administrate orders. Note that for the changes to be saved and the deliverer to be notified, you have to go through all steps and click the button "Order" on the "Confirmation" page.

## Administrate Orders

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If you have been given the right to administrate orders, the menu "Adm. order" is displayed in the right-hand menu. The right to administrate orders is given by the Administrator on the "User information" page and for each user. To do so, the Administrator will select the check box "Administrate orders" for one specific user, and will then be able to connect the user to one of several price lists. The user will then be able to access the administration and the reports of orders for the price lists he/she is connected to. Users who were given this right can:

1. Edit orders later than the day before the delivery date. "Ordinary" users can not edit today's orders or orders that have already been delivered.
2. Edit the orders of other users.
3. Register a comment and an additional cost for an order. This could be useful, for instance if the customer has made some kind of special request for an order.
4. Place an order for another user. The field "Order for" is only displayed if you are an administrator or if you have been given the right to administrate orders.
5. Register and edit information under the "Adm. order" menu option.
6. View the reports "Placed Orders" and "Order details" via the right hand "Reports" menu.

When your organisation is ready to start using the order feature in EZbooking, you should register your information in the following order:

1. Price lists
2. Types of delivery
3. Categories of products
4. Comments
5. Products

A type of delivery is connected to a price list and the price list can hold products from several categories. A product can be included in only one category of products and in only one price list. Below, you will find a more detailed explanation of these terms and how they are connected.

## Price Lists

Depending on the delivery types selected by the customer, different price lists may apply. There is a set of products for each price list. If the same product occurs more than once it will have to be registered twice, i.e. once for each

price list. There are different price lists for different delivery types. For example, it could be more expensive for the customer to get the food delivered, than if he/she picks it up on your premises. Only users that were connected to a price list from the Administration menu, have the right to edit the information of the price list.

1. Click "Price lists" under the "Adm. order" menu option.
2. Click "New price list" or select an existing price list that you want to edit.
3. Enter a name for the price list. If you want to, you can choose a name that indicates when the price list is used, for example "Takeaway price list" or "Service included price list". The name must be registered in all languages used in EZbooking.
4. Click "Save".

## Types of Delivery

Types of delivery could be, for example, "Take-away" or "Full-service delivery". A price list is linked to a type of delivery. All delivery ways must be registered using the "Adm. order" menu. You must also link the type of delivery to a price list. To do so, select a price list and click Save. The customer must always select a type of delivery when placing an order. Depending on the delivery type selected, different products and prices are displayed for the customer. If no products are displayed probably no price list was linked to the chosen type of delivery.

You only have the right to administrate the types of deliveries connected to a price list if you were granted access to do it. The Administrator sets this in the Administration menu, under Users.

You can also select if the type of delivery should be available for stand-alone orders (made without being connected to the booking of an object). You also have the possibility to connect the type of delivery to one of several objects. This involves that when booking an object, only the selected types of deliveries connected to this object will be available for ordering. E.g.: we recommend you to use this function when you have types of deliveries and objects not matching, such as: "Full-service delivery" and "rental car". Then you do not want this type of delivery be available for this object.

It is also possible to connect an e-mail address to a person responsible for the type of delivery. If you register an e-mail address, an e-mail will be sent to this address each time an order for this type of delivery is made. You will then also have the possibility to, through the "Placed Orders" report, send an e-mail to the person responsible with information on all orders for a chosen day.

1. Click on "Types of delivery" under "Adm. order".
2. Click "New way of delivery" or select the delivery way you want to edit.
3. Register the delivery types. The various delivery types are displayed when an order is being placed, and therefore it is important to register a name

which is easily understood. This could be, for example, "Takeaway" or "Full-service delivery". The name of the delivery types must be registered in all languages used in EZbooking.

4. Link a price list to the delivery types concerned.
5. Select if the type of delivery should be available for stand-alone orders (without being connected to a booked object).
6. Select the objects that should be connected to the type of delivery.
7. Click "Save".

## Categories of Products

The categories of products determine the sorting order of products in the various price lists. Products in the same category are listed next to each other in the price lists.

Click "Categories of products" under "Adm. order".

Click "New category of products" or select the category you want to edit. Register a name for the category of products. The names of the categories are not displayed to the user - their function is to make it easier for you to keep track of your products in the price lists. Click "Save".

## Comments

The comments feature can be used to give the customer additional information about a product. If you are taking food orders, two examples of comments could be "Vegetarian dish" or "Last orders at 1 p.m. day before delivery". Click "Comments" under "Adm. order".

Click "New comment" or select an existing comment that you want to edit. Enter the comment. When the comment is used for a product, a figure is displayed next to the product in the form of a footnote, and the comment is displayed in italics below the price list. The comment must be registered in all languages used in EZbooking. Click "Save".

## Products

When you register products, you must specify what category it belongs to and if there should be a comment. You should also indicate a price and the name of the product in all languages registered in EZbooking by the administrator. Before you can register any product you must register categories of products, price lists and delivery types.

1. Click "Products" under "Adm. order".
2. Select the price list where you want to register or edit products.

3. Click "New product" or select an existing product that you want to edit by clicking the name.
4. Register the name of the product. The name must be entered in all languages used in EZbooking.
5. Select a category and indicate if you want to use a comment for the product.
6. Indicate a price for the product. Currency settings are made by the administrator.
7. Click "Save".  
If you change the price of an existing product, the old price is used for all existing orders unless you open and edit the order after the price has been adjusted.

## Reports > Orders

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If you have been given the right to administrate orders, you will be able to view the reports "Placed orders" and "Order details".

### Placed Orders

1. Click "Reports" and "Placed orders". When you open this page it displays a list of the orders for today for the price lists and types of deliveries that are connected to your profile. The first order of the day is displayed at the top of the list, followed by the other orders in chronological order.
2. You can change the date by selecting the date desired in the selection boxes, or by clicking the buttons "Previous", "Next" or "Today" to move backwards or forwards in time. You can also select to see orders for one type of delivery at a time, by selecting that type of delivery in the select box.
3. Click "Update" to reload the page and check if any new orders have been registered since you opened the page.
4. The program displays all the information registered by the customer for each individual order. You can click the name of the customer to display more information on this person (phone number, e-mail address etc). By clicking the icon to the right of the order, you can edit the order. The delivery way selected is displayed at the top of the page.
5. If you selected to display a list of the orders for a specific type of delivery and if an address to the person responsible for that type of delivery was registered in the Administration, then you will see at the top right of your page an "E-mail orders" button. When you click this button, an e-mail is sent to the person responsible for the delivery type, with information about all orders for the selected date and type of delivery.

## Order Details

1. Click "Reports" and then "Order details"
2. Select the time period for which you wish to create a list.
3. Specify if you want the list Order per product, organisation, object or user.
4. Click view.
5. A combination of data based on your selection is displayed with the number of products, price and a summary for the selected period of time.