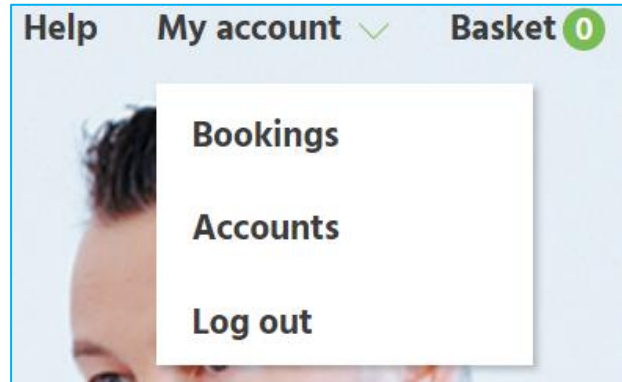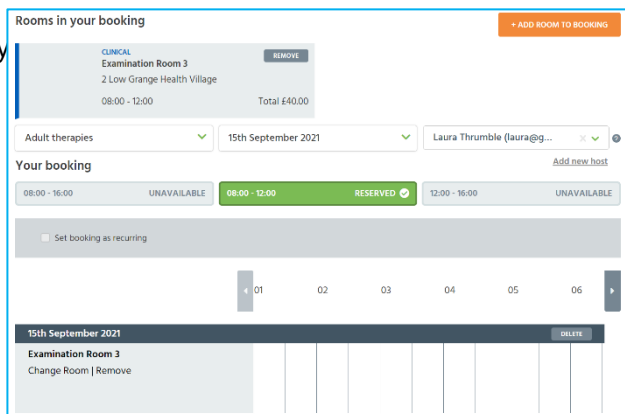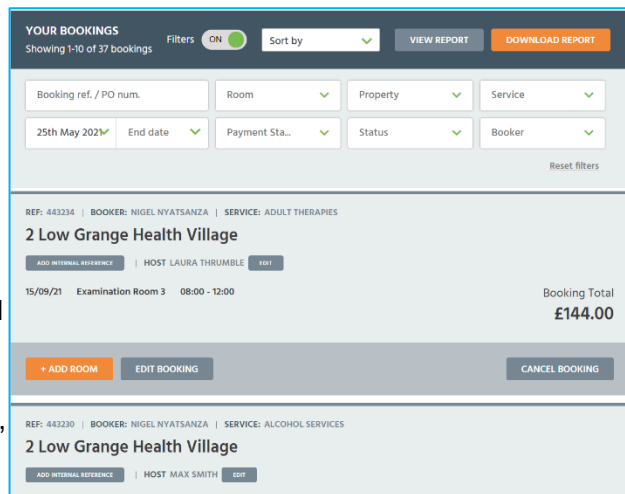## QRG9 – QUICK REFERENCE GUIDE

My Bookings

Viewing your Bookings

- Go to the My Account Dropdown menu and select the **[BOOKINGS]** option.

Bookings list

- You can use the filters at the top of the list to make it easier to find specific bookings.
- You can filter by booking ref/PO number, room, property, service, start and end date, payment status, booking status and booker.
- If you do not set any filters, the bookings list will display all your upcoming bookings.
- Each booking line will include information regarding which property and room are booked, the date and time as well as the cost for that booking.
- If you wish to make changes to your booking, you can do so if your booking is not fully paid by clicking on **[EDIT BOOKING]**.
- On the next screen, you will have the option to changes the date and time, the host and the service of the booking. (Subject to availability).
- Once the booking has been paid for, you will only be able to make changes to the host and the internal refernce.
- To edit the host, click on **[EDIT]** next to the name of your host.
- To edit or add an internal reference, click on **[ADD INTERNAL REFERENCE]**

Cancelling a single Booking

- On the bookings list, find the booking you wish to cancel and then click on **[CANCEL BOOKING]**.
- On the next screen, select your reason for cancelation from the drop down menu.
- Add additional information in the box below, if it is required, but it is not mandatory.
- Next click on **[APPROVE CANCELATION]**.
- Your booking has now been cancelled.

Cancelling a recurring Booking

- On the bookings list, find the recurring booking(s) you wish to cancel and then click on **[SHOW BOOKINGS]**.
- Select the specific Booking(s) you wish To cancel by ticking the relevant boxes
- Click on **[CANCEL SELECTED]**.
- Input your cancellation reason (as shown Above) and click **[APPROVE CANCELLATION]**.
- Your booking(s) have now been cancelled.

View your reports

- You can view and download your invoices and credits report by clicking on **[VIEW REPORT]** or **[DOWNLOAD REPORT]. (This report will be based on the transactions you have filtered)**
- You can also select which other reports you wish to view by clicking on the Reports drop down menu on the right hand side of the screen.
- You will have the option to view your full Bookings report.

VIEW REPORT　　**DOWNLOAD REPORT**

REPORTS

Please choose a report to view from the list.

Bookings report ⌄

View your cancellations report

- To view your cancellation report, use the filters and select the cancellation option on the status drop down.
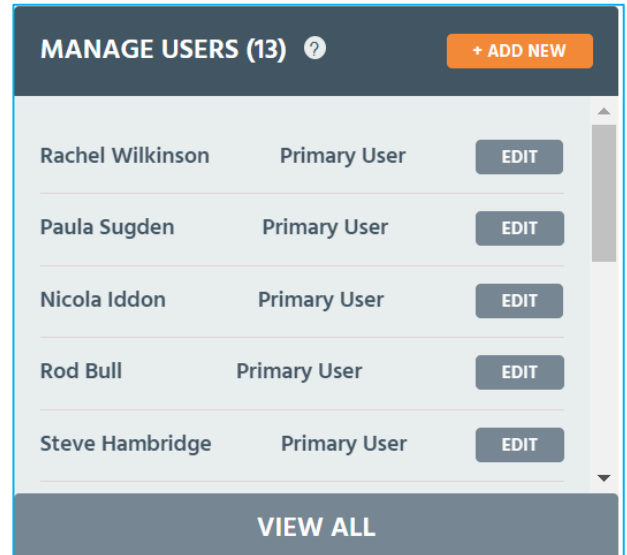- This will give you a list of all your past Cancellations.

`

Managing and adding new Users

- You can view, manage and add new users to your NHS Open Space account.
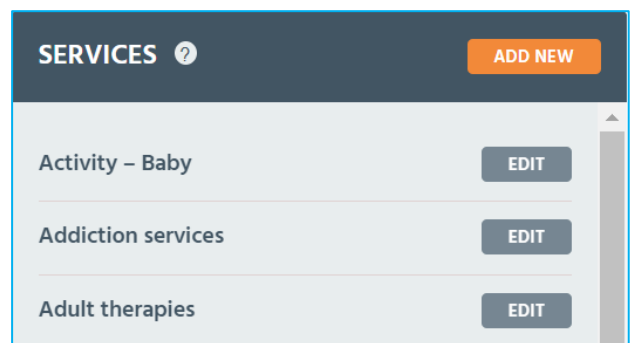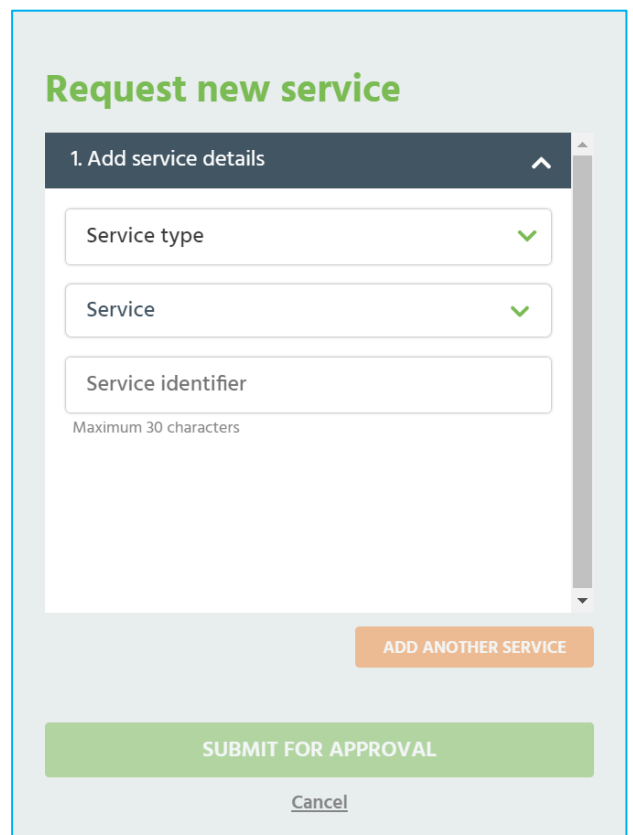- Further information on this in included in the 'Add and Manage Users' guide.

Managing and adding new Services

- Select **[ADD NEW]** in the top right corner of the Services box.
- Using the 'Services' menu, select from a list of health services.
- Select the **[ADD ANOTHER SERVICE]** button to add as many additional services as you require.
- Select 'Yes' if the service is CCG Commissioned and use the 'CCG Region' field to select the location to be serviced.
- Tick the box if you are licenced to perform the service and input your licencing body and registration number.
- Select the **[SUBMIT FOR APPROVAL]** button.
- It can take up to 48 working hours for your Service to be made live on the system to book against.

MANAGE USERS (13) ?   **+ ADD NEW**

Rachel Wilkinson	Primary User	EDIT
Paula Sugden	Primary User	EDIT
Nicola Iddon	Primary User	EDIT
Rod Bull	Primary User	EDIT
Steve Hambridge	Primary User	EDIT

VIEW ALL

SERVICES ?   **ADD NEW**

Activity – Baby	EDIT
Addiction services	EDIT
Adult therapies	EDIT

Request new service

| 1. Add service details | ^ |

Service type ⌄

Service ⌄

Service identifier

Maximum 30 characters
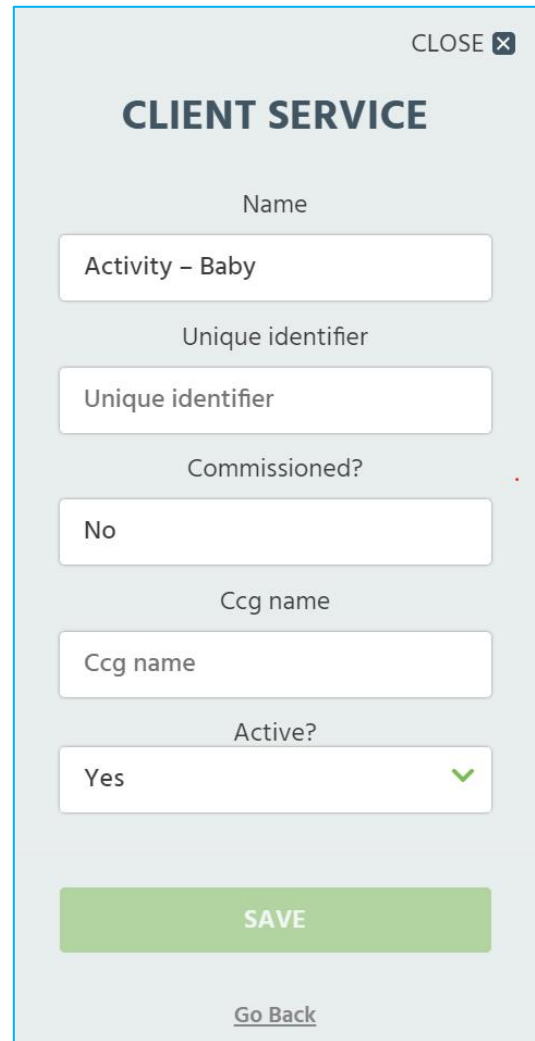
ADD ANOTHER SERVICE

SUBMIT FOR APPROVAL
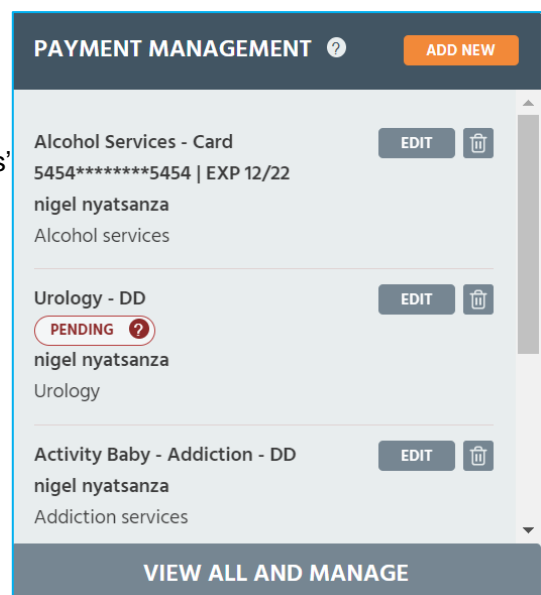
Cancel

EDIT

Editing a Service

- To edit a service, click on **[EDIT].**
- Update any of the information that you wish to edit.
- You can edit the name, have a unique identifier, set whether it is a commissioned service or not, input or update the CCG and confirm if the Service is still active.
- Once you have made your changes, click on **[SAVE]**

CLOSE ✖

CLIENT SERVICE

Name

Activity – Baby

Unique identifier

Unique identifier

Commissioned?

No

Ccg name

Ccg name

Active?

Yes ⌄

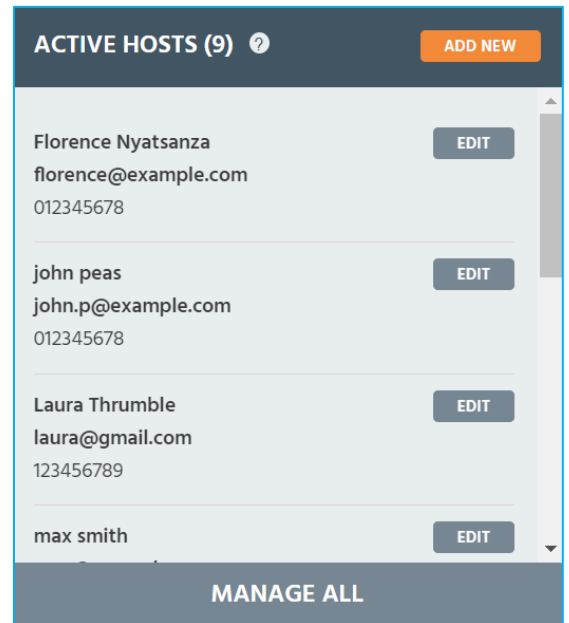SAVE

Go Back

Payment Management

- You can view, manage and add new Payment Methods to your NHS Open Space account.
- Further information on this in included in the 'Direct Debits' and 'Payment Cards' guides.

PAYMENT MANAGEMENT ⓘ   ADD NEW

Alcohol Services - Card   EDIT 🗑
5454********5454 | EXP 12/22
nigel nyatsanza
Alcohol services

Urology - DD   EDIT 🗑
PENDING ❓
nigel nyatsanza
Urology

Activity Baby - Addiction - DD   EDIT 🗑
nigel nyatsanza
Addiction services

VIEW ALL AND MANAGE

Host Management

- You can view, manage and add new Hosts to your NHS Open Space account.
- Select **[ADD NEW]** to add a new host.
- Click on **[EDIT]** to edit an exisiting host.

ACTIVE HOSTS (9) ❓   `ADD NEW`

Florence Nyatsanza
florence@example.com
012345678   `EDIT`

john peas
john.p@example.com
012345678   `EDIT`

Laura Thrumble
laura@gmail.com
123456789   `EDIT`

max smith   `EDIT`

MANAGE ALL

- If you are editing or adding a new host you will be asked to input or amend the host names, phone number and e-mail address.
- To remove a hostm change their status from active to inactive.
- Click on **[ADD NEW HOST**] to add your new host.
- If you are editing a host, select **[UPDATE DETAILS]** to update your hosts information

CLOSE ❌

ADD NEW HOST

Please add details for the host

First Name

Last Name

Email

Phone Number

ADD HOST

CLOSE ❌

HOSTS

Update host details.

Florence

Nyatsanza

florence@example.com

012345678

Active ⌄

UPDATE DETAILS

Go Back

Password Management

- To change or update your password,
- Click on **[EDIT PROFILE]** at the top
  of the Bookings screen.
- Use this screen to update your name, and phone numbers
  And update your marketing preferences.
- Input your existing password.
- Type in a new password.
- Confirm your new pasword.
- Click on **[UPDATE PROFILE]**