# QuDieMGA

# Trial Lessons User Guide

## Overview

Trial Lessons are training flights paid for in advance by the purchase of a voucher. Vouchers may be purchased directly from the flying club or from third party companies. In the first case the flying club needs to have a system to track the sale and validity of vouchers it has sold to ensure they are used within their period of validity time, that the appropriate flight is provided and that the voucher is only be used once. In addition clubs should know how many vouchers are outstanding at any time since these represent a liability to future "free" flights that the club has to provide and the cost of these may be used to reduce the club's tax liability. When a flight is provided to a Third-party Voucher holder, the club needs to invoice the voucher supplier the amount agreed for the related voucher.

## Flying Club Vouchers

Club vouchers are sold as shop items.

**To create Trial Lesson Voucher products within the shop:**

- Open the Set-up & Analysis screen and click OTC Products (Over the Counter Products) within the Setup area.
- Click Add Product.
- Enter the sale details of the voucher in the DESCRIPTION field. Use a common start to the description for all vouchers to aid selection when selling the voucher e.g. Trial Lesson Voucher -half hour 2 seat, -one hour 2 seat etc.
- Enter a Product No. and Product Class (Nominal Ledger Code) if required.
- Enter the price (including vat) in the PRICE field.
- In the Special Categories section, check the Trial Lesson Voucher box.
- Repeat for further vouchers.

**Selling a Trial Lesson Voucher:**

- Click Club Shop on the Main screen.
- If the voucher is being purchased by a member select them in the TO field, otherwise leave as CASH SALE.
- Select the appropriate voucher from the Product drop-down list. In the above description example, with the cursor in the Product filed typing "TRI…" will display the list of vouchers.
- Leave the QTY a 1 or amend as necessary. The invoice total will be shown above the PROCEED button.
- Note the Invoice No. shown at the top of the Invoice screen and write this on the face of the voucher being sold. This is the reference used to track the voucher.
- Click PROCEED and complete the sale as usual. It is recommended that a printed invoice is provided to the purchaser as proof of purchase.

**Checking the Validity of a Voucher:**

- Click Voucher validation on the Main screen, enter the Invoice No. written on the presented voucher (see above) and click OK.

- If the voucher is valid its date of sale and description will be shown. **Note that the details of an out of date voucher will still be displayed. Whether such a voucher can be used for a flight is at the discretion of the club.**
- If the voucher has already been used or cancelled the relevant Flight No. or the date it was cancelled will be shown.
- A blank display indicates that the invoice no. entered does not relate to the sale of a voucher and the validity of the voucher must be questioned.

**Using a Voucher for a Trial Lesson Flight:**

To maintain accurate aircraft and instructor records, the flight details must be entered in the Flight Log Entry screen as follows.

- Click Flight Log Entry on the Main screen.
- Select Trial Lesson in the PILOT/STUDENT field.
- Select the relevant INSTRUCTOR and AIRCRAFT.
- Enter the START and STOP times for the flight.
- Enter the Invoice No. written on the presented voucher (see above) in the VOUCHER NO. field. This entry will automatically cancel the voucher validity.
- Close the Flight Log Entry screen.
- The flight details will immediately be recorded in the Flight Log and the entry cleared from the Flight Log Entry screen the next time an invoice is processed.
- Details of the flight, including the Voucher No, may be displayed on the Edit Flight screen, opened via the Set-up & Analysis screen.

**Tracking Sold Trial Lesson Vouchers**

- A list of Used Vouchers is available on the Main screen.
- A list of Unused Vouchers is available in the Analysis area of the Setup & Analysis screen. A voucher may be cancelled on this screen if required e.g. when supplying a replacement voucher for one lost in the post.
- **For Third-party vouchers see below.**

## Third-Party Vouchers

Since invoices will be raised to them, third-party voucher suppliers must be entered in the Members database and pricing installed for the vouchers they supply.

**Entering a Voucher Supplier (Issuer) as a Member:**

- On the Set-up area of the Set-up and Analysis screen, click Members.
- Enter the Company name in the FAMILY NAME field.
- Enter Address and contact details in the relevant fields.
- Leave MEMBERSHIP CATEGORY as Standard.
- Change the EXPIRES date to one suitably distant to avoid annual reminders.
- If the supplier is to have an account, check the ALLOCATE ACCOUNT box and ensure the CASH ONLY box is checked.
- Close screen.

**Installing Pricing:**

- On the Set-up area of the Set-up and Analysis screen, click Voucher Charges.
- Select the Voucher Supplier in the ISSUER field.
- Enter a description that will allow you to identify the voucher being presented in the VOUCHER DESCRIPTION field.
- Enter the price including vat that the club in the CHARGE TO ISSUER field.
- Repeat as required for the range of Issuers/Vouchers.

**Invoicing a Third-Party Voucher Flight:**

- On the Flight Log Entry screen, select the Voucher Supplier in the PILOT/STUDENT field.
- A Select Voucher Charge screen will open listing the range of vouchers for which pricing is installed for this Supplier. If any warnings relating to currency etc appear, click OK to ignore them.
- Click the record selector square on the left hand side of the screen to select the voucher being used.
- Click Enter at the top of the screen.
- Enter the Suppliers Voucher reference in the VOUCHER Reference field which will have been highlighted.
- Complete the remaining flight entry fields including actual START and STOP times.
- Click Raise Invoice. Note that the invoice amount reflects the price installed and that the voucher no. is included in the invoice description.
- Complete the transaction using the Account Payment method or Debtor if invoices are individually submitted for settlement.

## Need more Help?

If you get stuck or want to talk through the best way to address your specific operating practice, contact *CavOK Ltd*. We look forward to working with you.

We are able to provide on-line help during which we can remotely control your desktop and talk you through setting-up and getting the best from the system. Call us to arrange a convenient time for this.

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