



Schools Cash Office

Lettings Administration Software

BookingPro from Tucasi Ltd

A large, light blue decorative arc that curves from the bottom left towards the top right, framing the central text.

SCO Lettings (BookingPro)

Installation guide (version 4.3)



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www.tucasi.com

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1. Before You Start

SCO Lettings is an application called BookingPro supplied by Tucasi Ltd. The application will be referred to as BookingPro throughout this document.

We recommend that you read through these instructions carefully before attempting to install BookingPro.

2. System Pre-requisites

This section describes the system requirements for installing BookingPro. If you have any questions about this, you may need to refer to your IT Support organisation.

The computers on which you install BookingPro should meet the following system requirements:

Processor

Minimum recommended: 1.3 GHz processor

RAM

Windows 7 – Minimum recommended: 2 GB

Windows 8 – Minimum recommended: 2GB

Operating System

Windows 7 Professional SP1 32bit and 64bit

Windows 8 / 8.1 Professional 64bit

Windows Server 2008 SP2 32bit

Windows Server 2008 R2 SP1 64bit

Windows Server 20012 R2

Available Hard Disk Space

250 MB including the .NET framework 3.5

Other Applications

Microsoft Office is needed to generate booking confirmations, invoices, credit notes and spreadsheets. Microsoft Office versions 2007, 2010 and 2013 are currently supported.

Database

The computer used to hold the database must satisfy the minimum requirements for running Microsoft SQL Server. For further information, refer to www.communitylettings.com/faqs.

3. Installing BookingPro

This section describes how to install BookingPro in a networked environment. Installing BookingPro is a straightforward process although you may need to refer to your IT Support organisation if you have any questions about your computer hardware or your network.

BookingPro Architecture

BookingPro is designed to be used in a networked environment. It allows multiple users on their individual PCs to concurrently access a single BookingPro database. To enable this, the BookingPro database must be installed on a computer and a location on the network that is accessible by all BookingPro users. This computer will be the BookingPro **server**.

The advantages of this are that it makes it easy to:

- Update the software, ensuring each user is using the same version.
- Incorporate the software files in a regular backup regime.
- Configure BookingPro on additional PCs.

3.1. Backing up BookingPro data

Backing up your data is an essential part of using BookingPro and failure to do this could result in the loss of data. You should always discuss backing up BookingPro with your IT Support organisation - to ensure that both the BookingPro software and database are secure, your IT Support organisation should incorporate BookingPro into their regular procedure to backup to external media.

In addition, BookingPro contains its own backup and restore procedure which you can use to create backups and to restore them whenever you need to. You will be prompted to create a backup every time you exit BookingPro. In addition, you can create a backup at any time using the **Backup Database** option on the **File** menu.

For more details on the BookingPro Backup procedure, see the section 5 on **Creating Backups**.

3.2. Installing BookingPro on the Server

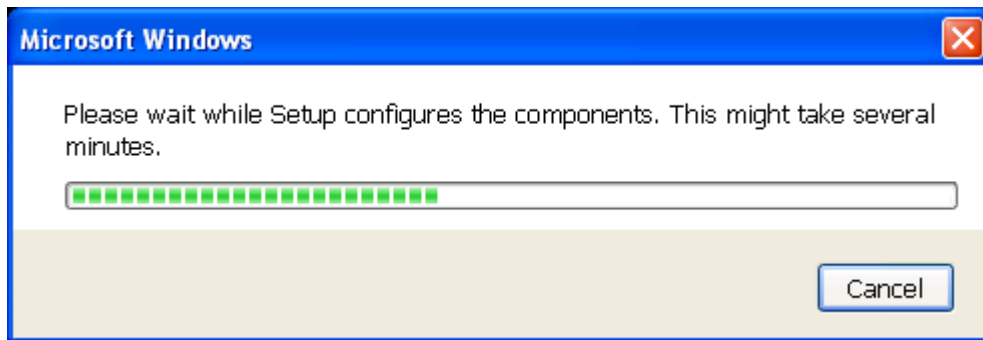
If you are installing on **Windows Server 2008** please refer to section 0

If you are installing on **Windows Server 2012** please refer to section 0

3.2.1. Install Microsoft .Net Framework 3.5

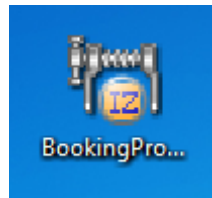
You must install BookingPro on the **server** before configuring on any **client** PCs.

- Log on to the server with local **Administrator** rights.
- Click on the setup folder **download link** as per your installation email.
- If Microsoft .Net Framework 3.5 is not already installed on the server, you will be informed before BookingPro is installed.
- **Press any key** to continue. Microsoft .NET Framework 3.5 will start installing. Installation can take several minutes, and it is important not to interrupt or cancel it.

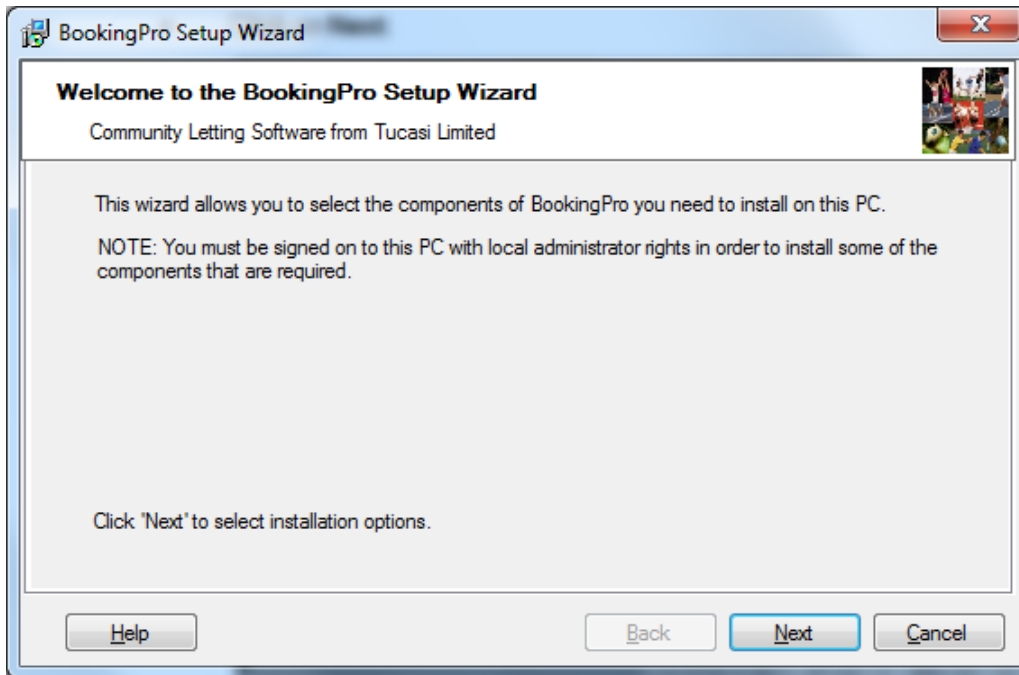


3.2.2. Install BookingPro

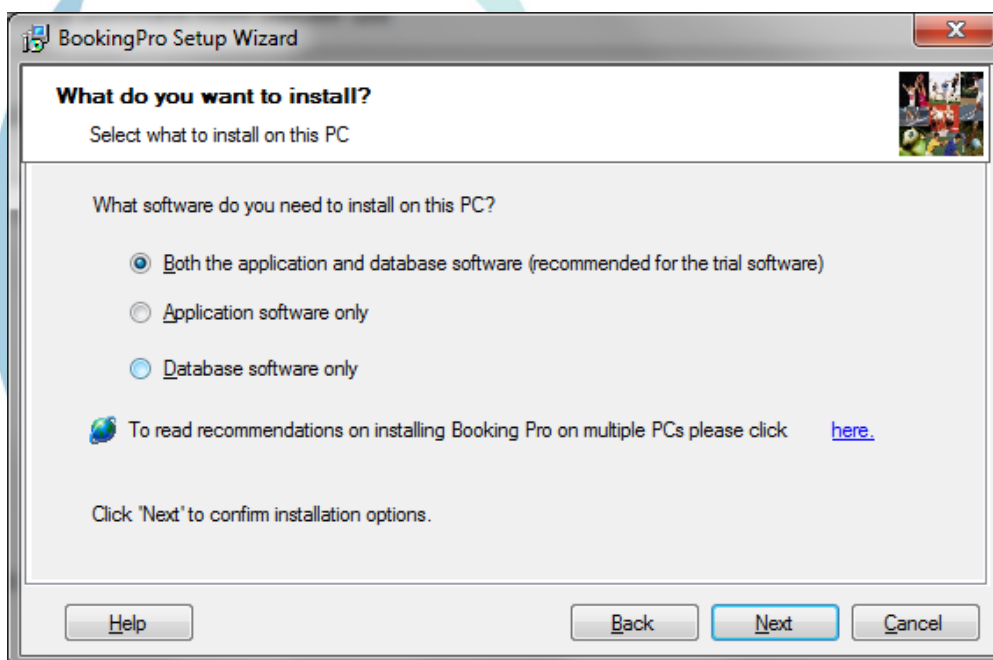
- Click on the **BookingPro set up file**.



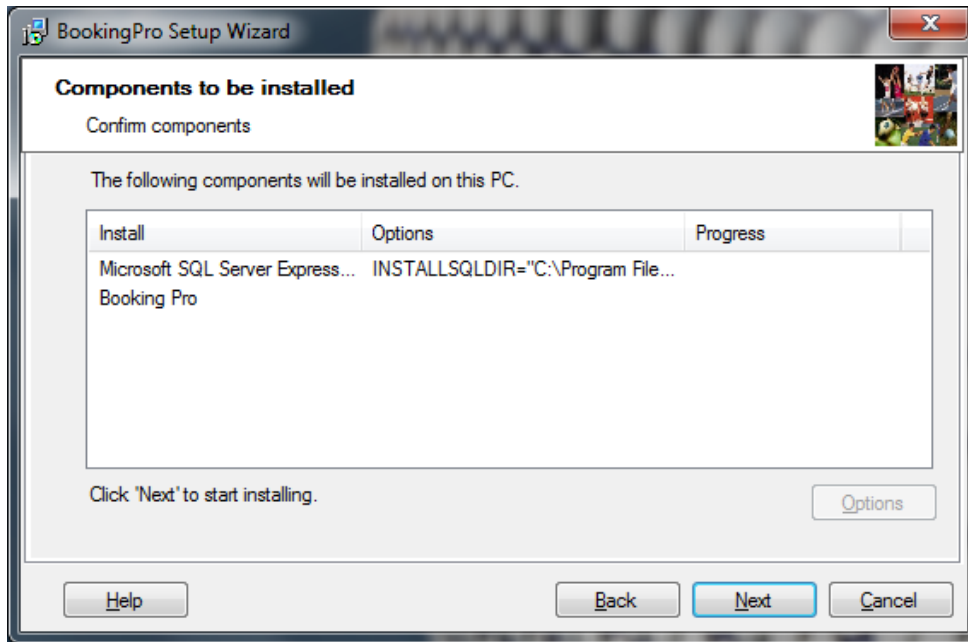
- The **BookingPro Setup Wizard** should start automatically.



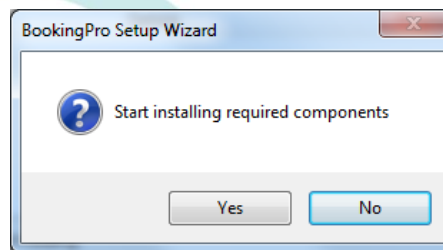
- Click on **Next**.
- Select **Both the application and database software**.



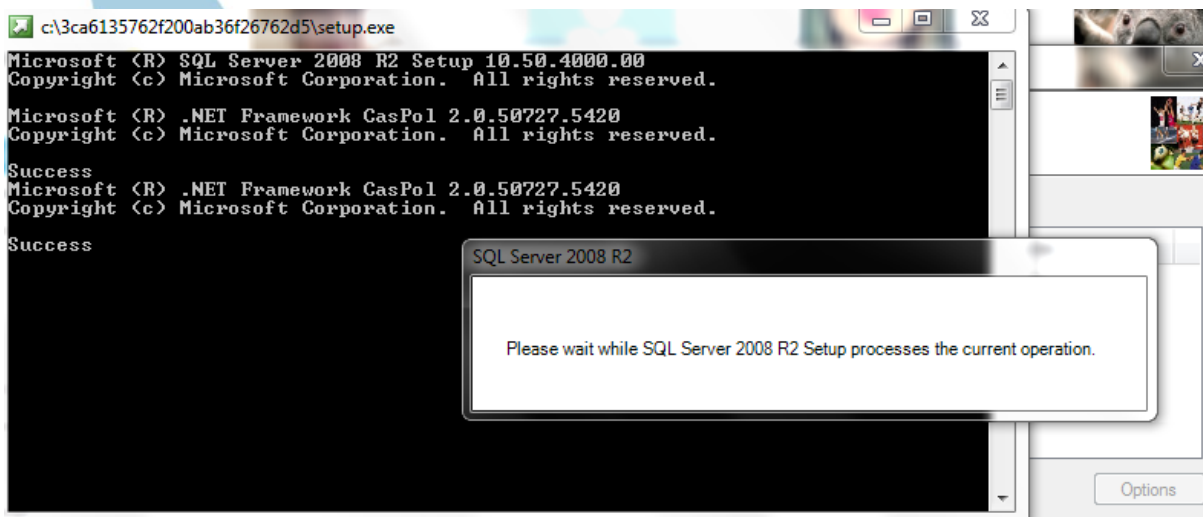
- Click on **Next**.
- If SQL Server Express 2008 is not installed, the following screen will be displayed:



- Click on **Next**.



- Click on **Yes** when the BookingPro Setup Wizard pop up window appears.
- The following screens will appear in turn.

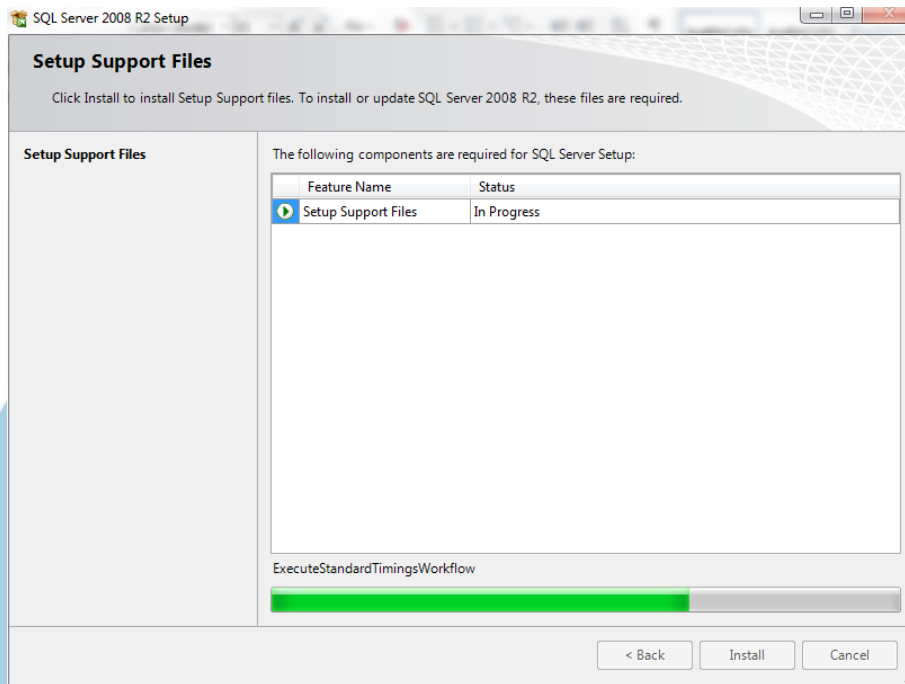


```
c:\3ca6135762f200ab36f26762d5\setup.exe
Microsoft (R) SQL Server 2008 R2 Setup 10.50.4000.00
Copyright (c) Microsoft Corporation. All rights reserved.

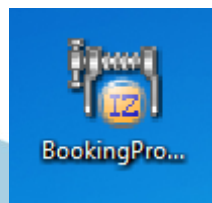
Microsoft (R) .NET Framework CasPol 2.0.50727.5420
Copyright (c) Microsoft Corporation. All rights reserved.

Success
Microsoft (R) .NET Framework CasPol 2.0.50727.5420
Copyright (c) Microsoft Corporation. All rights reserved.

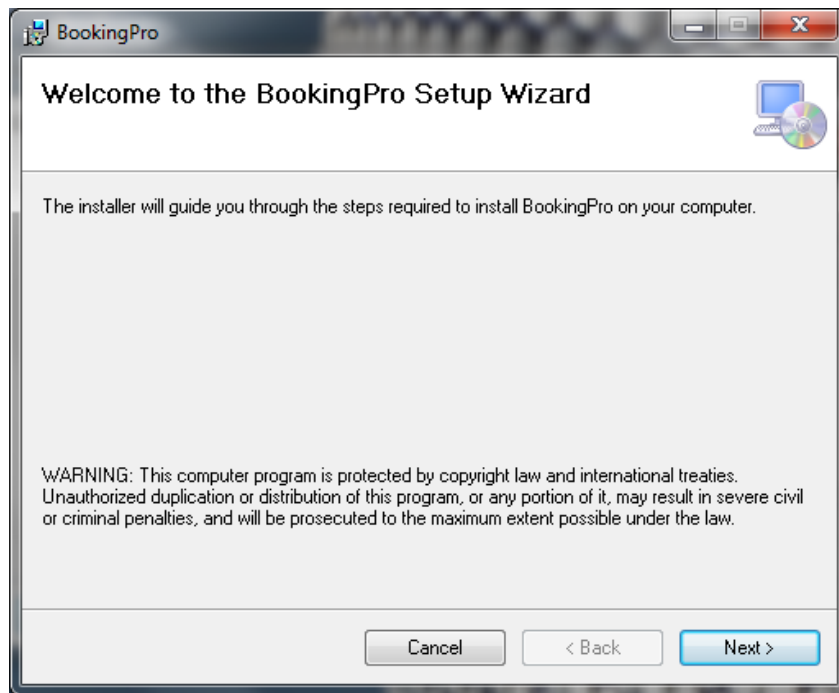
Success
```



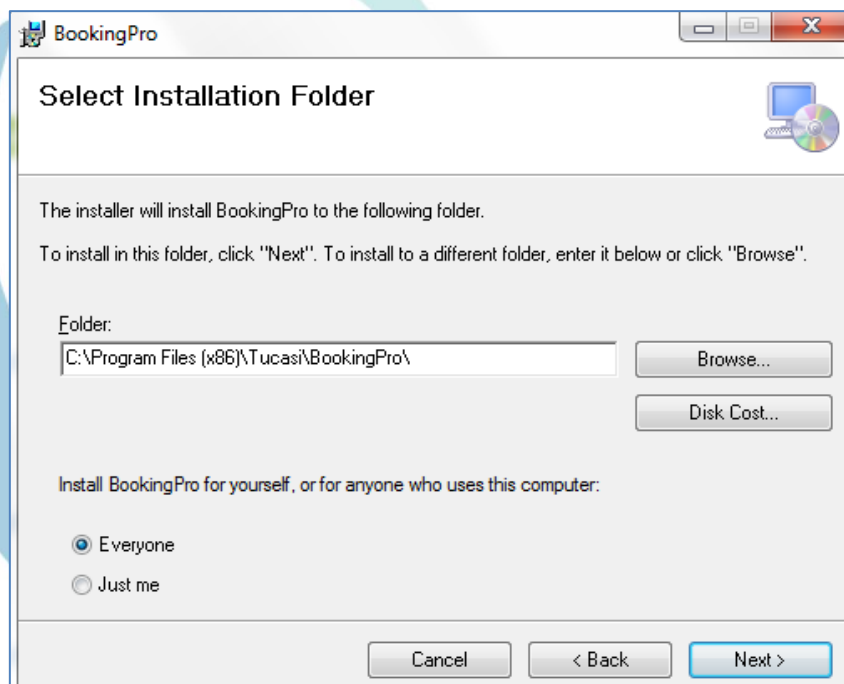
- If the Setup Wizard does not display automatically, click on the **BookingPro** icon on your desktop.



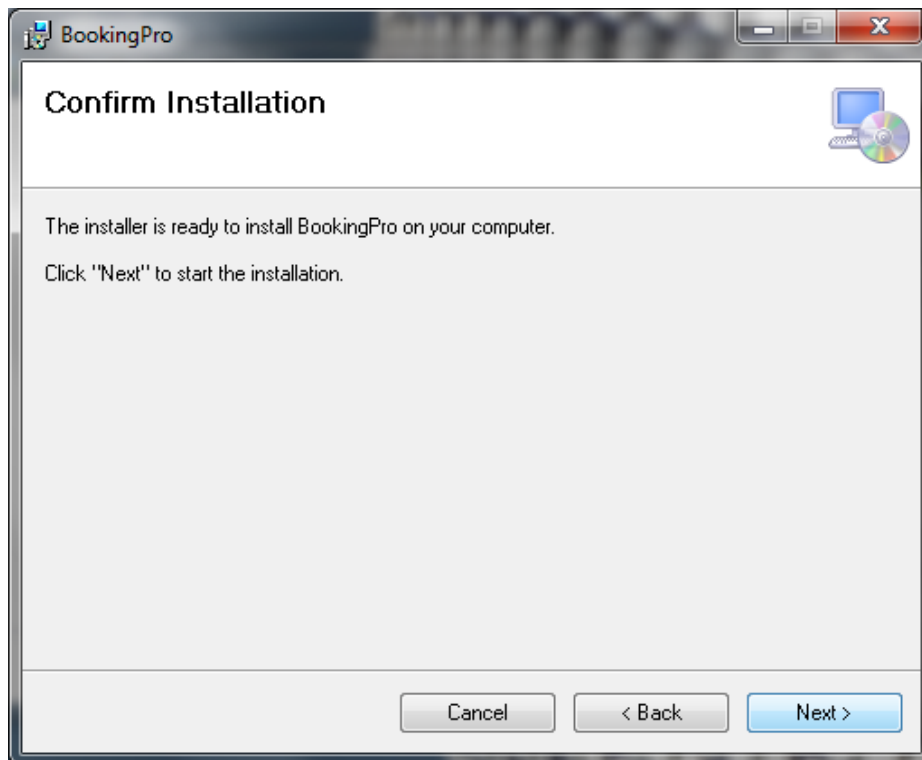
- The Setup Wizard will be displayed.



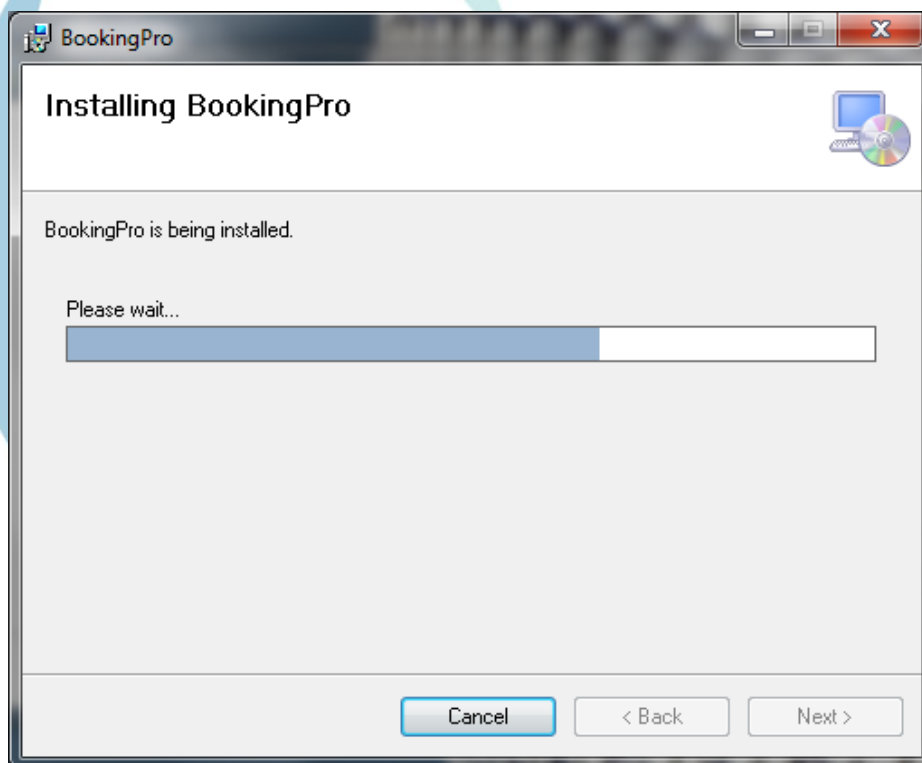
- Click on **Next**.

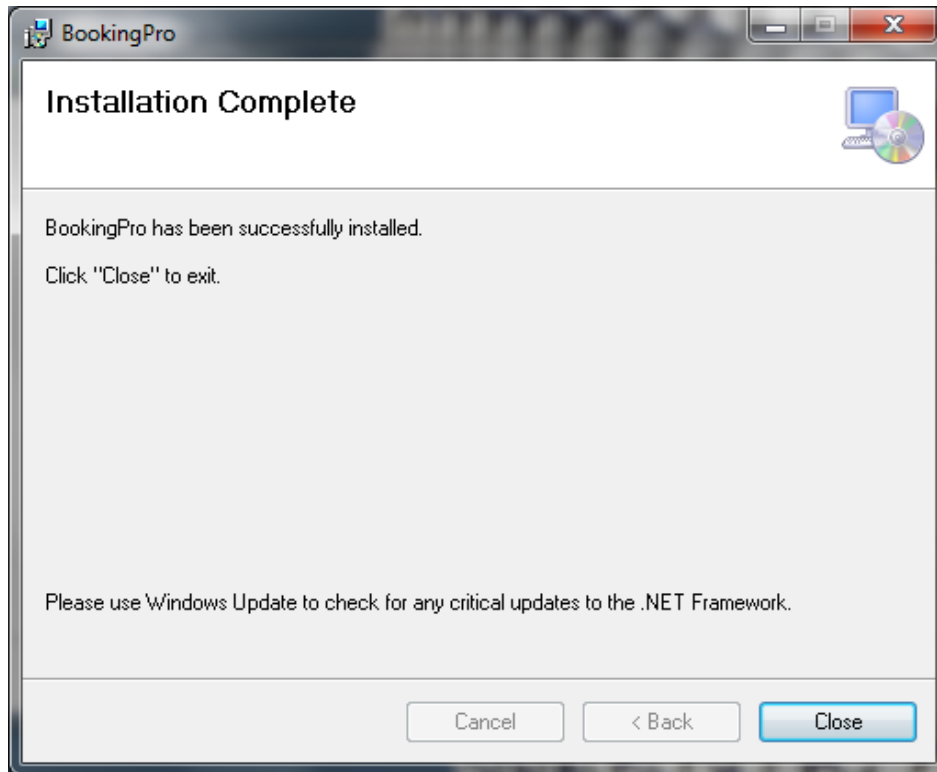


- Select the required installation path.
- Click on **Next**.

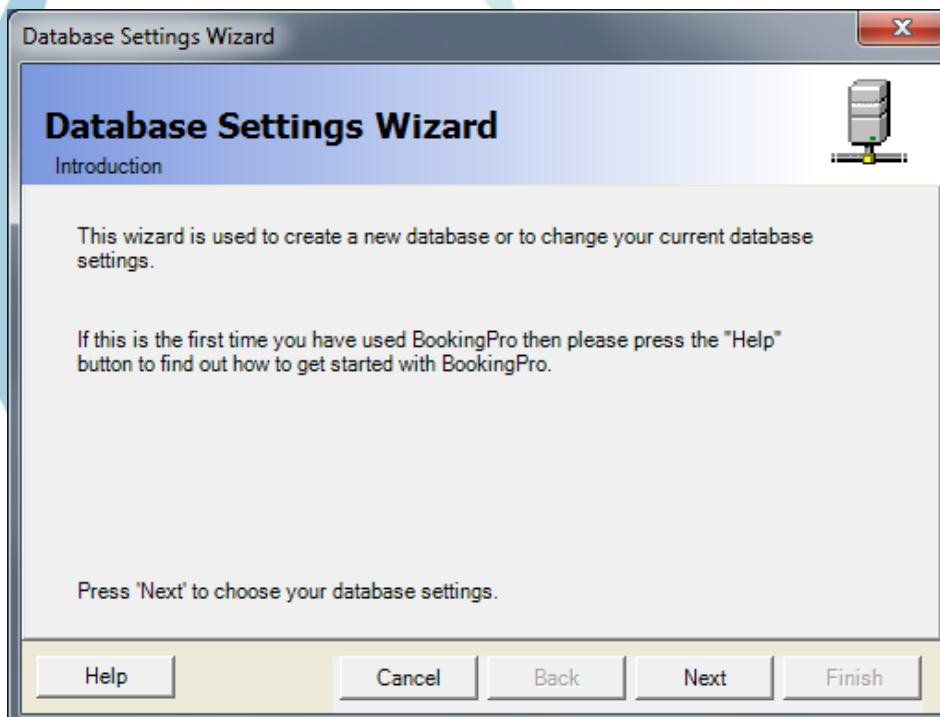


- Click on **Next**.

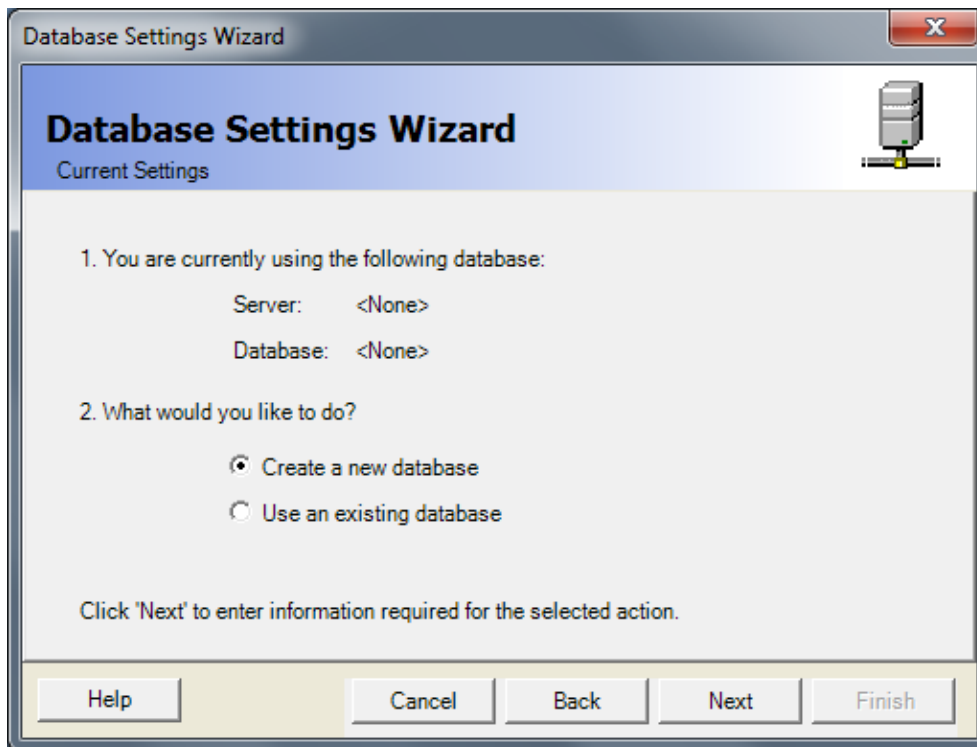




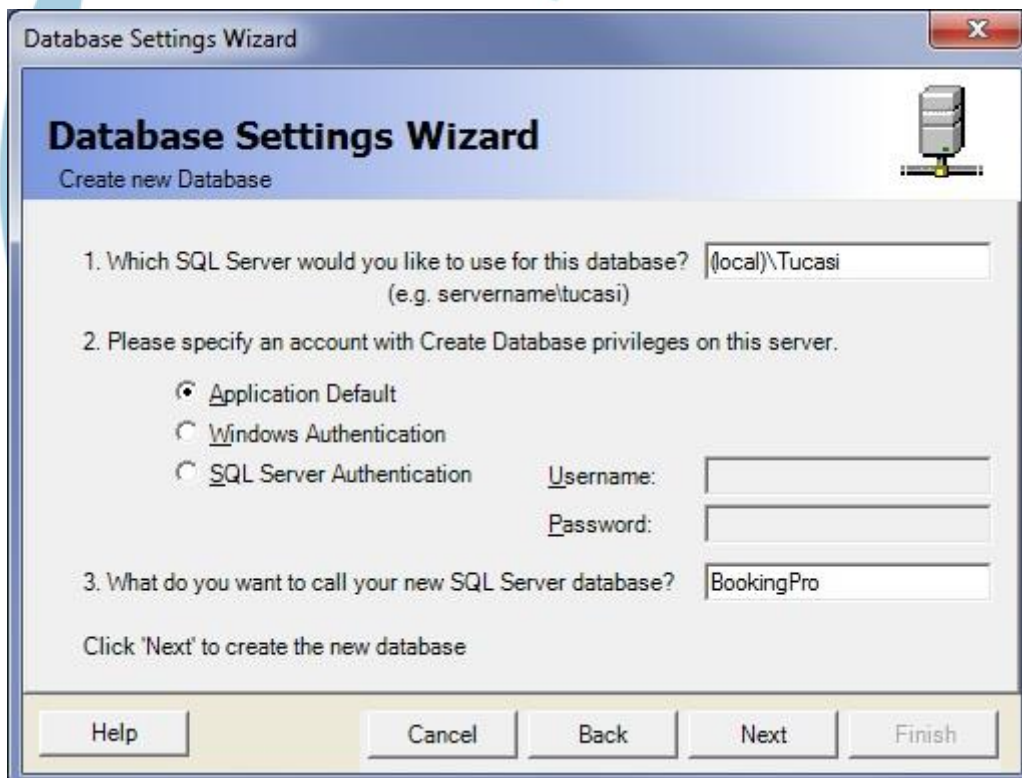
- Click on **Close**.



- Click on **Next**.



- Select **Create a new database**.
- Click on **Next**.



- Select **Application Default**.
- Click on **Next**.

3.3. Configuring BookingPro on client PCs

BookingPro runs on the client PCs via a shortcut to the application installed on the server. The only software required to be installed on the client PC is Microsoft .Net Framework 3.5.

3.3.1. Install Microsoft .Net Framework 3.5

- Log on to the server with local **Administrator** rights.
 - Click on the setup folder **download link** as per your installation email.
 - If Microsoft .Net Framework 3.5 is not already installed on the server, you will be informed before BookingPro is installed.
 - **Press any key** to continue. Microsoft .NET Framework 3.5 will start installing. Installation can take several minutes, and it is important not to interrupt or cancel it.
-

3.3.2. Setting Windows access rights on server

If you use Windows access rights control in your network, you **must** set the appropriate Windows user access rights on the **server**.

- On the server machine, load **My Computer**.
 - Navigate to the server folder where BookingPro is installed e.g. D:\applications.
 - Right-click on the BookingPro installation folder.
 - Select **Sharing and Security** (or Properties) and then select the **Security** tab.
 - Click on the Add button (you may need to click the Edit button first) and enter the required Windows group name or user names.
 - Click on **Check Names** and click on **Done**.
 - Select the required Windows group/users. Tick the **Modify** box below.
 - Click **OK**.
-

3.3.3. Setting Windows access rights on a new Share

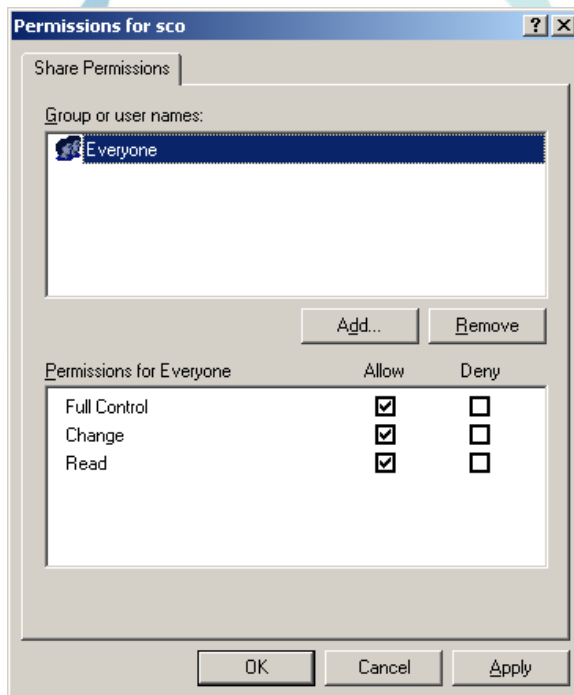
If you have created a new Share for BookingPro, you must set Windows user access rights appropriately on the Share. You must ensure that the Share is not Read only and that the users have the appropriate permissions set to access the Share.

- On the server machine, load **My Computer**.
- Navigate to the folder you have shared. For example, you may have created a new folder named BookingPro and shared it.
- Right-click on the folder you have shared.

- Select **Sharing and Security** and then select the **Sharing** tab.



- Click **Permissions**. On Windows Server 2008 click on **Share**.



- Enter the required Windows user group or user names.

- Enter the required Windows user group or user names.
- Tick **Change** or **Full Control** (if Full Control allowed).
- Click on **OK**.

3.3.4. Create a shortcut to BookingPro on the server machine

- Open **My Computer** and browse to the folder containing the BookingPro program.
- Right click the **Bookingpro.exe** icon and select **Send to** and **Desktop (create shortcut)**.
- Go to the PC **desktop**. (If you want to rename the shortcut, right click the shortcut and select **Rename**. Type the new name (BookingPro) and press **Enter**.)

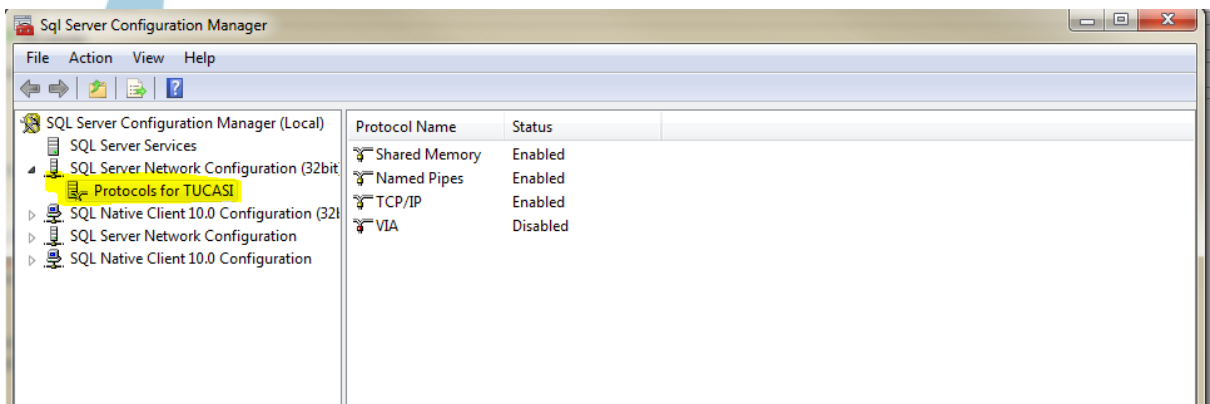
3.4. Additional Configuration

There may be additional configuration required on the server to allow the Clients to connect to the SQL instance of BookingPro.

3.4.1. Enable Named Pipes Protocols in SQL Server Configuration Manager

- Go to **Start**, select **All Programs** and select **Microsoft SQL Server**.
- Select **Configuration Tools** and **SQL Server Configuration Manager**.

NB: the screen below may differ slightly depending on SQL version.



3.4.2. Disabling (or allowing exceptions) to your Firewall

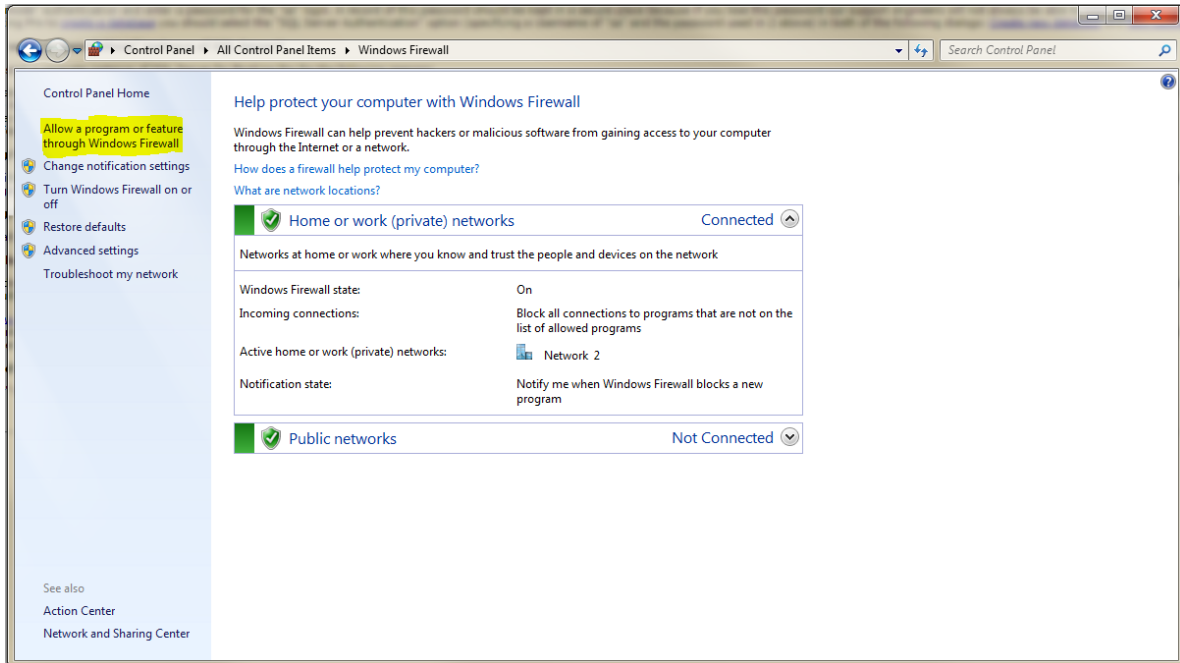
In addition, if you are using a Windows firewall, you may need to disable it. If this isn't feasible then the following must be added to the exceptions list through the firewall:

sqlservr.exe
sqlbrowser.exe

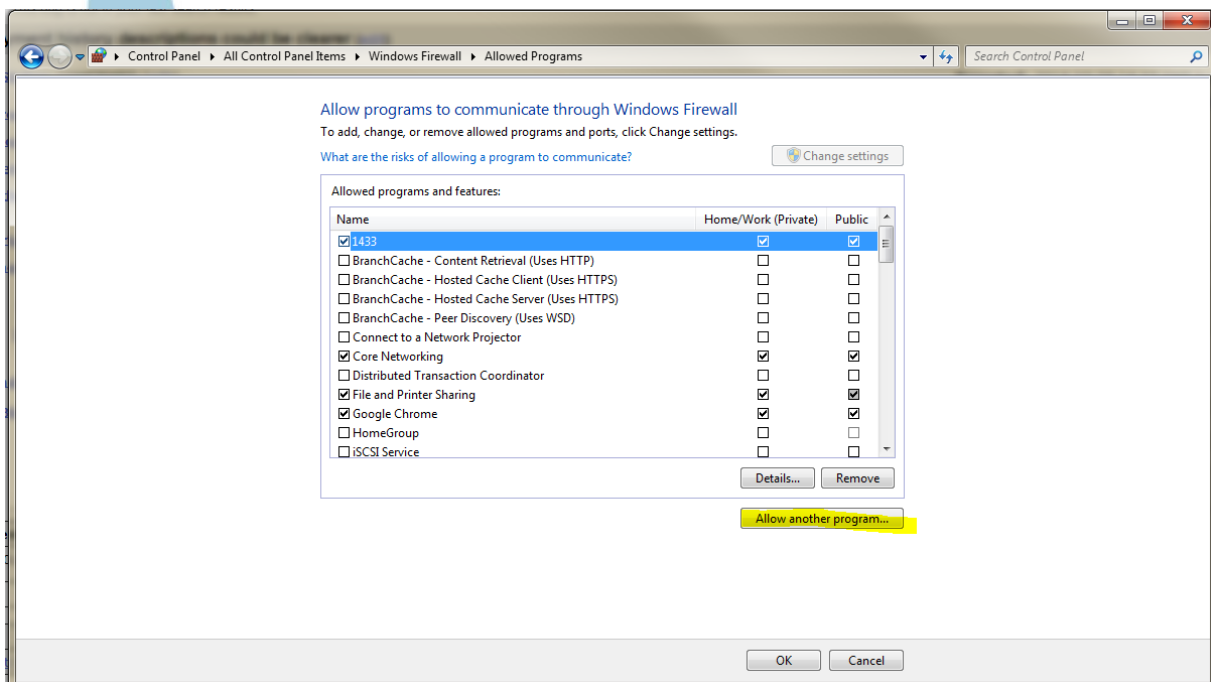
- This can be done from your **Windows Control Panel**, from the **System and Security** group, select **Windows Firewall**.

- Click on **Allow a Program or Feature through the Firewall.**

NB: the screen below may differ depending on OS.



- Click on the **Allow another Program** button.



3.5. Start using BookingPro

- Double click the **BookingPro** icon on the desktop.
- The first time you use BookingPro, the software automatically checks to see if there are any updates available. Click **Next** to start downloading the updates. When the downloads are complete, click **Finish**.
- BookingPro opens at the **Welcome** page. To sign-in to BookingPro, see the section on **Log on to BookingPro**, p.16.

4. Setting up BookingPro

Before you start to use BookingPro, we recommend the following:

- Make a list of your standard prices and the facilities you have available for hire.
- Group the facilities together in a logical way (e.g. classrooms, pitches, tennis courts). Creating groups of facilities means that they appear together in the facility list and is particularly useful when you want to allow the system to automatically allocate the first available facility from the group.
- Make a list of the dates when the facilities are closed or when you charge higher rates (e.g. public holidays).

4.1. Log on to BookingPro

- Double-click the desktop icon to open BookingPro and display the **Welcome** screen.
- Enter the **User Name** and **Password** you set up during the installation process.
- Click **Sign-In**. BookingPro will open with the **Booking Calendar** displayed.

4.2. Activate BookingPro

Before starting to use BookingPro, you should activate the software by entering your licence key details.

- Click the **Help** menu and select **Activate Product**.
 - Click **Next**.
 - Enter your **16-digit activation code** and click **Next**.
 - Enter your **school name** and click **Next**.
 - Click **Finish**.
-

4.3. Set up Users

You can specify which users have access to BookingPro, and restrict those users to certain areas of BookingPro (e.g. the Calendar, Hirers, Facilities, etc.).

- Select the **Tools** menu and **Security**.
- Click **Add** to display the **User Properties** form.

Feature	Allow	Deny
Accounts	Read, Modify	
Calendar	Read, Modify	
Facilities	Read, Modify	
Hirers	Read, Modify	
Options	Read, Modify	
Reports	Execute	
Security/Database Manage...	Read, Modify	
vTill	Execute	

Permissions for Accounts	Allow	Deny
Read	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Modify	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Complete the form as follows:
 - **User Name:** enter the name you wish the User to sign on with.
 - Click **Change Password** and enter the User's password. Retype the new password to confirm and select **Change Password**.
 - **Permissions:** use the list to **Allow** or **Deny** the User access to the different areas of BookingPro. (For example, to grant a User read-only access to accounting functions, select **Accounts** and check the **Deny** box.)
 - **Allow direct access using external programs** (e.g. Microsoft Excel): check this option to allow the User to access the database using external programs (e.g. to use the **Import External Data** option in Microsoft Excel).
- Click **OK** and confirm that you wish to save the changes.

4.4. The Setup Checklist

When you log on to BookingPro, the **Setup Checklist** is displayed. This helps you carry out the initial setup and is also a shortcut for help on all aspects of BookingPro. This checklist can be displayed at any time by selecting the **View** menu and **Setup Checklist**.

There are four steps shown in the Setup Checklist: **Configure options, Enter prices, Setup facilities for hire, Start entering bookings**. Clicking any of the buttons guides you to the appropriate area of BookingPro, while clicking the word **More** to the right of each step displays related Help topics.

4.5. Configure BookingPro defaults

The **Options Wizard** will help you configure BookingPro ready for use.

- Select the **Tools** menu and select **Options**.
- Click **Next**.
- In the **Bookings Defaults** window:
 - Select **Provisional** or **Confirmed** to make new bookings default to the corresponding status.
 - Set the default **Start time** for new bookings to the time you generally start accepting bookings from.
 - Set the **Duration** of new bookings to the duration of a typical booking.

Options Wizard

Options Wizard

Booking Defaults

Invoicing Defaults

Pricing Defaults

VAT Rates

1. What would you like to use as the default status for new bookings:

Provisional

Confirmed

2. What time do you want to use as a default for new bookings:

16:00

3. What duration do you want to use as a default for new bookings:

60 minutes

Press 'Next' for Invoice Defaults.

Help Cancel Back Next Finish

- When you have finished making changes, click **Next**.
- In the **Invoicing Defaults** window:
 - Set **After how many days does an invoice become overdue?** to the required number of days. After this period an invoice is automatically marked as Overdue. Using a value of zero will result in invoices not being marked as overdue.
 - Under **At what number do you want to start numbing invoices?** enter the required number.
 - Select whether or not accounting items such as invoices, credit notes and receipts can be changed.

- For printed invoices to list each booking covered by the invoice, select the **Print Bookings** option. Alternatively, for a summary of the bookings on each invoice, select **Print Summary**.

The screenshot shows the 'Options Wizard' dialog box with the 'Invoicing Defaults' step selected. The left sidebar lists 'Booking Defaults', 'Invoicing Defaults', 'Pricing Defaults', and 'VAT Rates'. The main area contains four questions:

1. After how many days does an invoice become overdue? (Input: 28 days)
2. At what number do you want to start numbering invoices? (Input: 1)
3. Can invoices, credit notes, receipts and refunds be changed or deleted? (Radio buttons: Yes (selected), No)
4. Should printed invoices list each booking or a summary by price group? (Radio buttons: Print Bookings (selected), Print Summary)

At the bottom, it says 'Press 'Next' for Pricing Defaults' and has buttons for Help, Cancel, Back, Next, and Finish.

- When you have finished making changes, click **Next**.
- In the **Pricing Defaults** window:
 - If you offer **insurance** cover at an extra charge, enter the charge as a percentage of the net cost of the booking. When a Hirer elects to use your insurance, a charge will be added to any automatically generated invoices.
 - If you charge the first few hours of each booking at a different rate to subsequent hours, enter the number of hours charged at the initial rate.

The screenshot shows the 'Options Wizard' dialog box with the 'Pricing Defaults' step selected. The left sidebar lists 'Booking Defaults', 'Invoicing Defaults', 'Pricing Defaults', and 'VAT Rates'. The main area contains two questions:

1. If you charge for insurance how much do you charge? (Input: 5.00 % VAT Rate: Zero-rated)
2. If the first few hours are charged at a different rate, enter the number of hours below (Input: 1 hours)

At the bottom, it says 'Press 'Next' for VAT Rates.' and has buttons for Help, Cancel, Back, Next, and Finish.

- When you have finished making changes, click **Next**.
- In the **VAT Rates** window:
 - **Add** a new VAT rate by typing a name for the band in the next available row.
 - **Delete** a VAT rate by clicking on the row marker to highlight the row and pressing **Delete** on your keyboard.

- Make one of the VAT rates the **default rate** by highlighting the row and clicking **Set As Default**.

The screenshot shows the 'Options Wizard' dialog box with the 'VAT Rates' tab selected. The main area contains a table with the following data:

VAT Code	Rate (%)	Default Rate
Zero-rated	0.00	<input type="checkbox"/>
Standard 20%	20.00	<input checked="" type="checkbox"/>
Insurance Premium Tax (IPT)	5.00	<input type="checkbox"/>
Exempt	0.00	<input type="checkbox"/>

Below the table is a 'Set As Default' button. At the bottom of the dialog are buttons for 'Help', 'Cancel', 'Back', 'Next', and 'Finish'. A message at the bottom reads: 'Press 'Finish' to save your changes.'

When you have finished making changes, click **Finish** and **Yes**.

4.6. Amend the BookingPro Templates

BookingPro includes templates to enable you to quickly create the following:

Microsoft Word documents:

- Booking confirmation template
- Hirer mail merge template to create letters to hirers
- Insurance reminder template
- Invoice/Credit template
- Receipt template
- Reminder template
- Statement template

Excel spreadsheets:

- Daily booking calendar
- Weekly booking calendar
- Monthly booking calendar

The Microsoft Word templates should be amended to fit on your letter headed paper and to include the school name, address, etc. We recommend you read the full template to ensure the text is appropriate to your school.

To amend the templates:

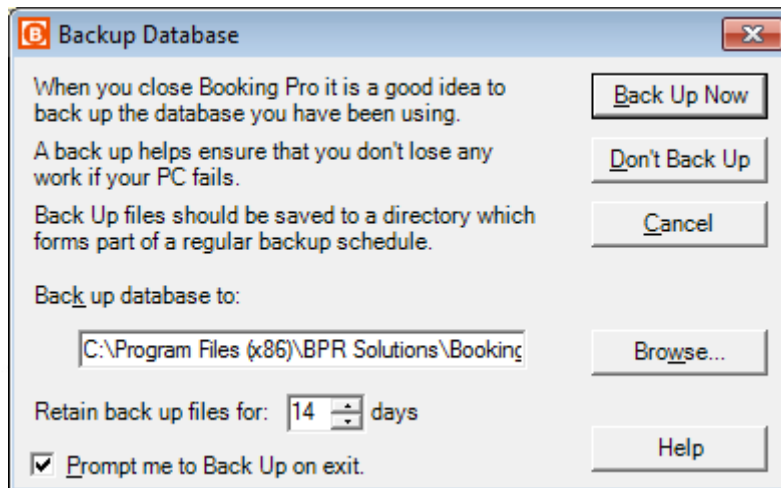
- Select the **File** menu and select **Open**.
- Select the template you wish to change and click **Open**. The template will open in Microsoft Word / Excel.
- Make the required changes in Word / Excel.
- **Save** the template and close Word / Excel.

5. Creating Backups

To make it easy for you to restore data if you make a mistake when entering data, BookingPro contains its own backup and restore procedure which you can use to create backups and to restore them whenever you need to. You will be prompted to create a backup every time you exit BookingPro (though this can be turned off).

In addition, you can create a backup at any time using the **Backup Database** option on the **File** menu.

The following form is displayed.



Backup files are stored in the folder specified in the **Back up database to** box. By default this will be a folder called **Backups** within your program folder (e.g. C:\Program Files\Tucasi\BookingPro\Backups). If this is not the folder you wish to use for your backup files click **Browse** and select the required folder.

By default, backup files are retained for 14 days. If you wish to retain them for a longer period, change the required number of days in the **Retain back up files for** box.

Normally you will be asked to backup the database every time you exit BookingPro. If you prefer this not to happen, uncheck **Prompt me to Back Up on exit**.

Click the **Back Up Now** button to backup the database. Alternatively clicking the **Don't Back Up** button will close the form without creating a backup.

6. Training options

You may wish to receive training for BookingPro.

For details of our training options, please contact us on 0844 800 4017, opt 2

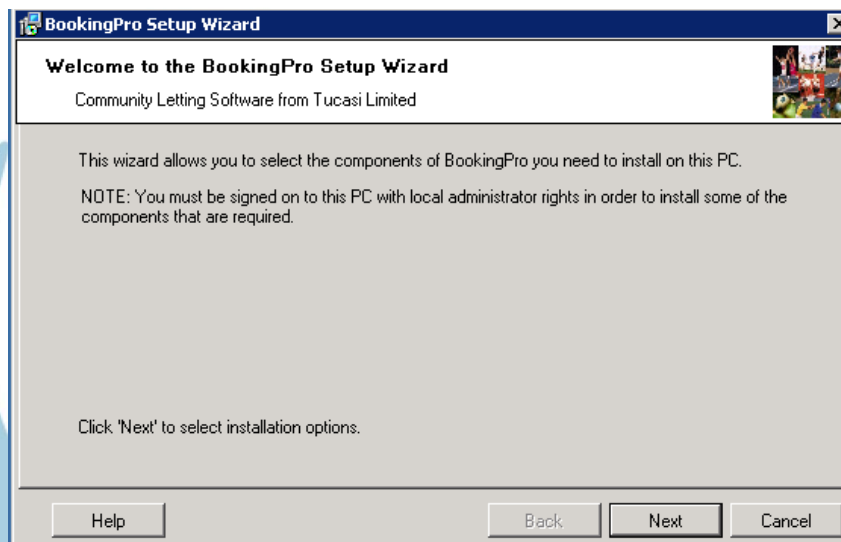
7. Appendix A – Installing BookingPro on Windows Server 2008

You must install BookingPro on the **server** before configuring any **client** PCs.

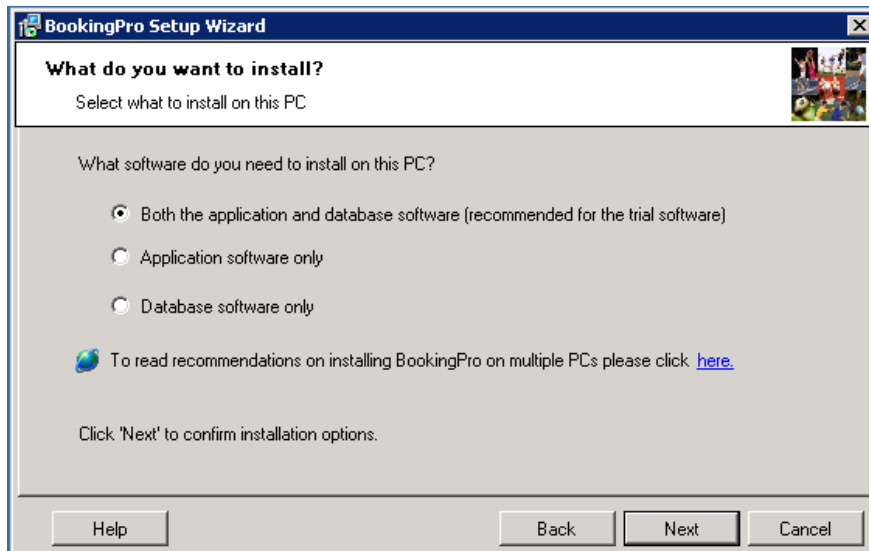
- Log on to the server with local **Administrator** rights.
- Click on the setup folder **download link** as per your installation email.
- Click on the **BookingPro set up file**.



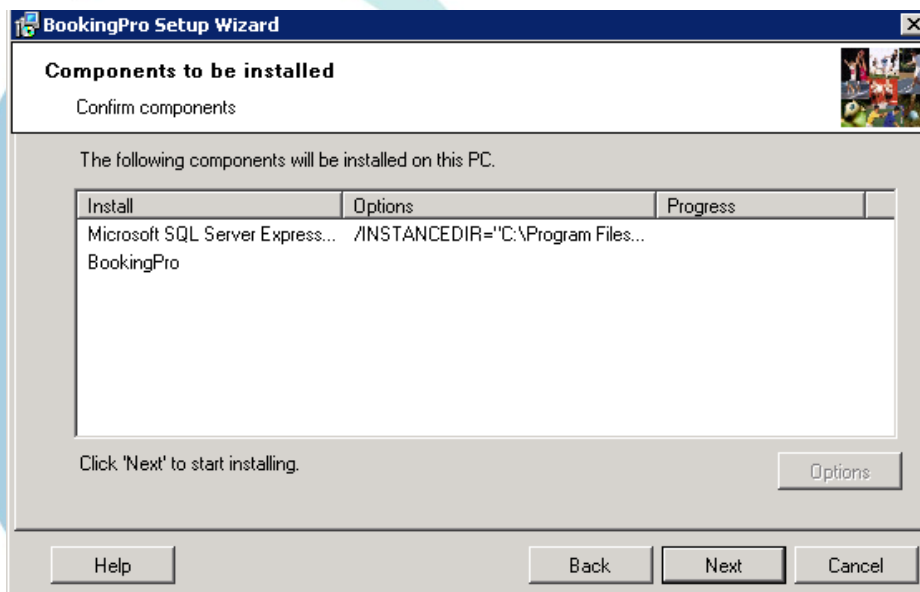
- The **BookingPro Setup Wizard** should start automatically.



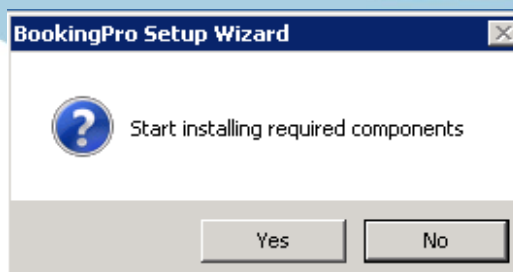
- Click on **Next**.
- Select **Both the application and database software**.



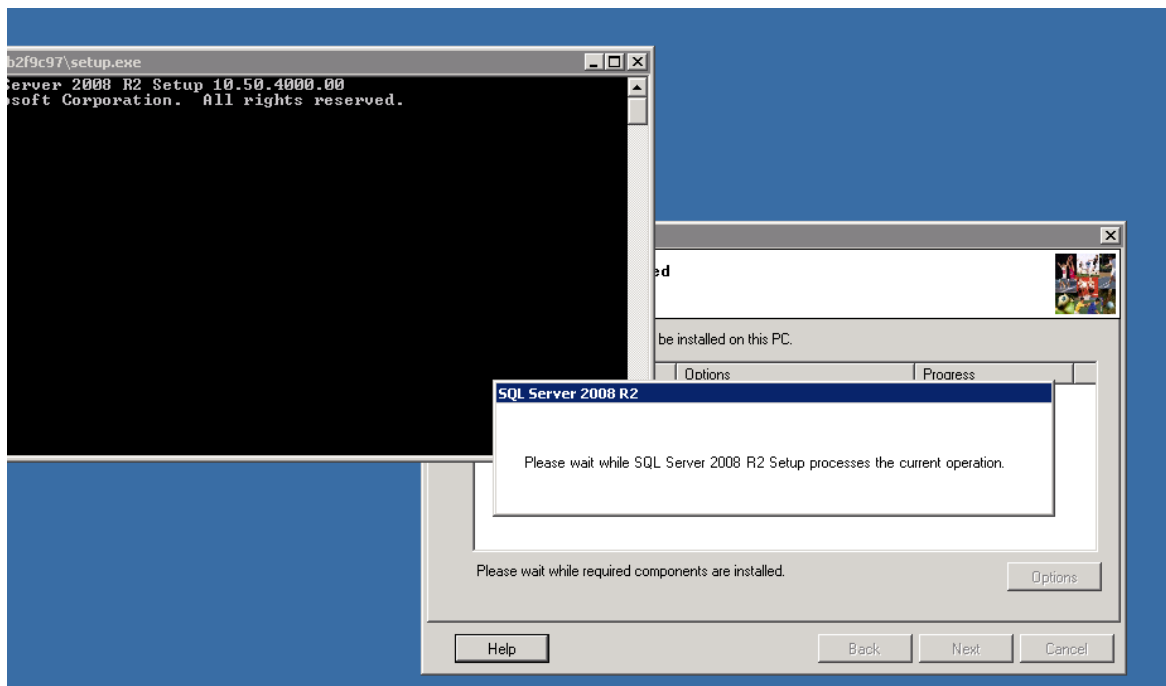
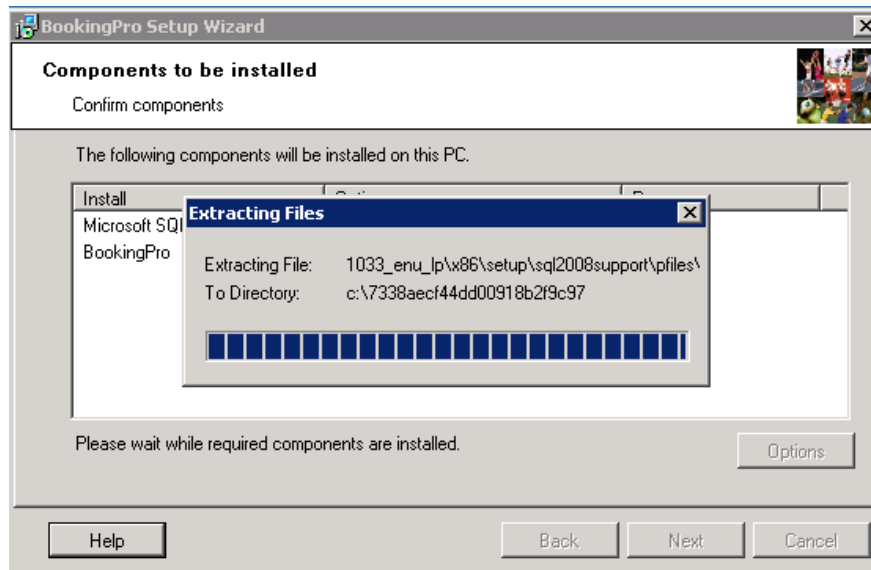
- Click on **Next**.
- If SQL Server Express 2008 is not installed, the following screen will be displayed:
- Click on **Next**.



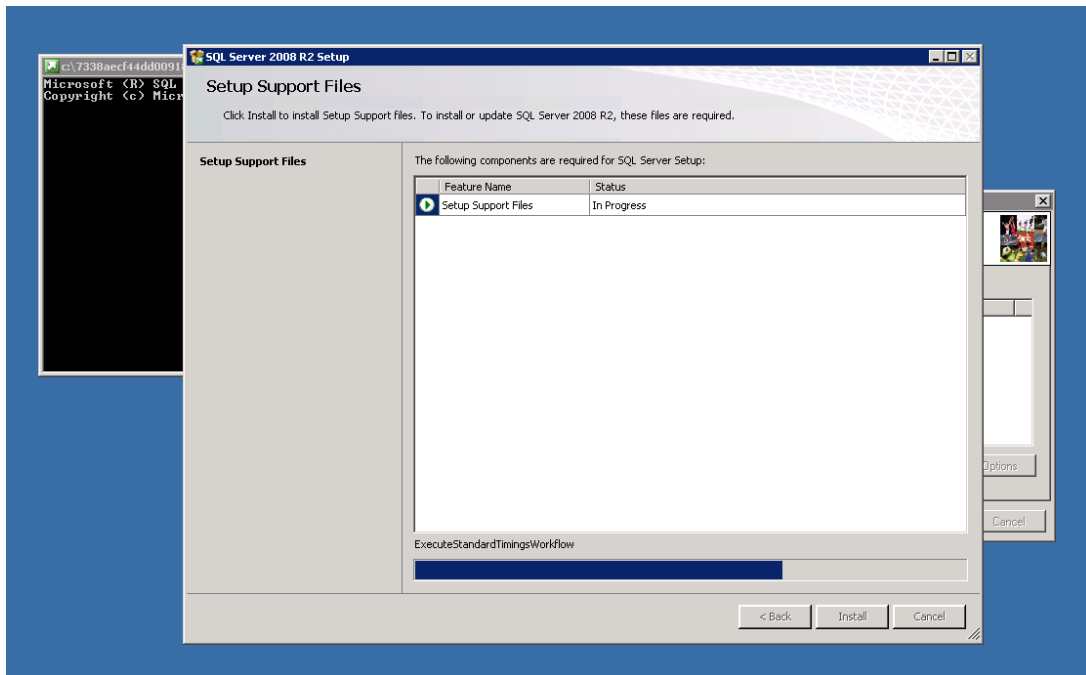
- Click on **Next**.



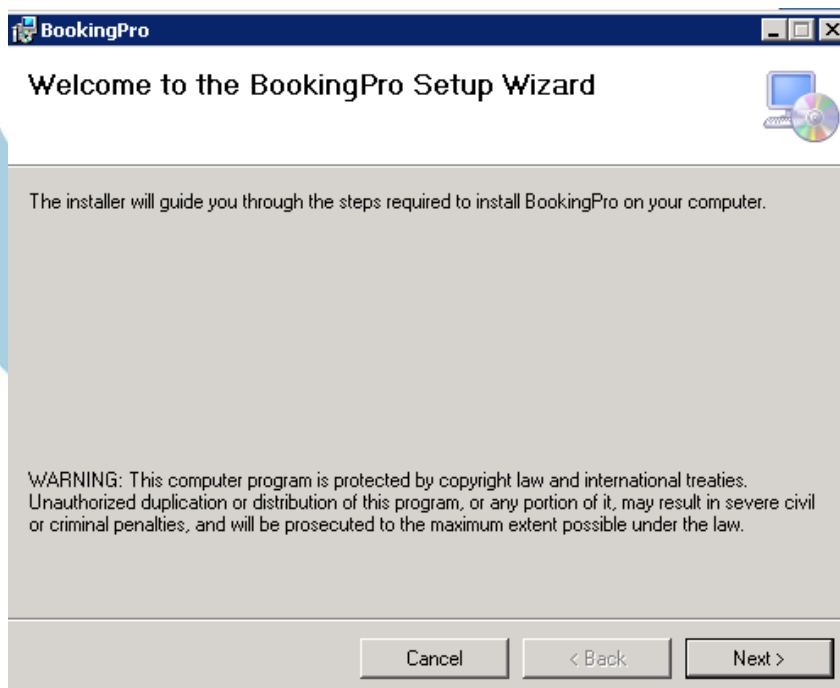
- Click on **Yes** when the BookingPro Setup Wizard pop up window appears.
- The following screens will appear in turn.



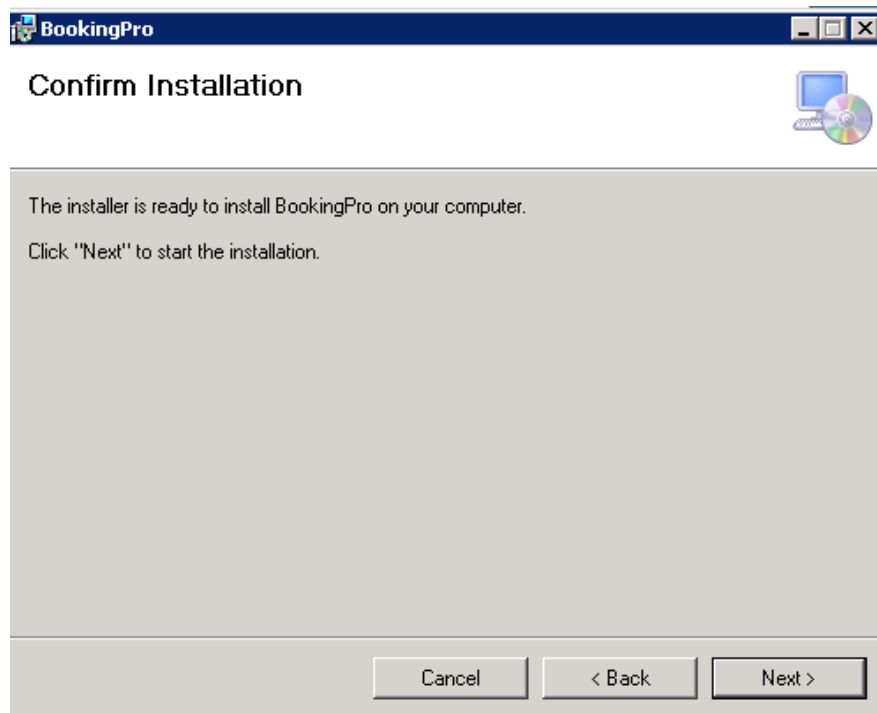
- The following screen will then be displayed.



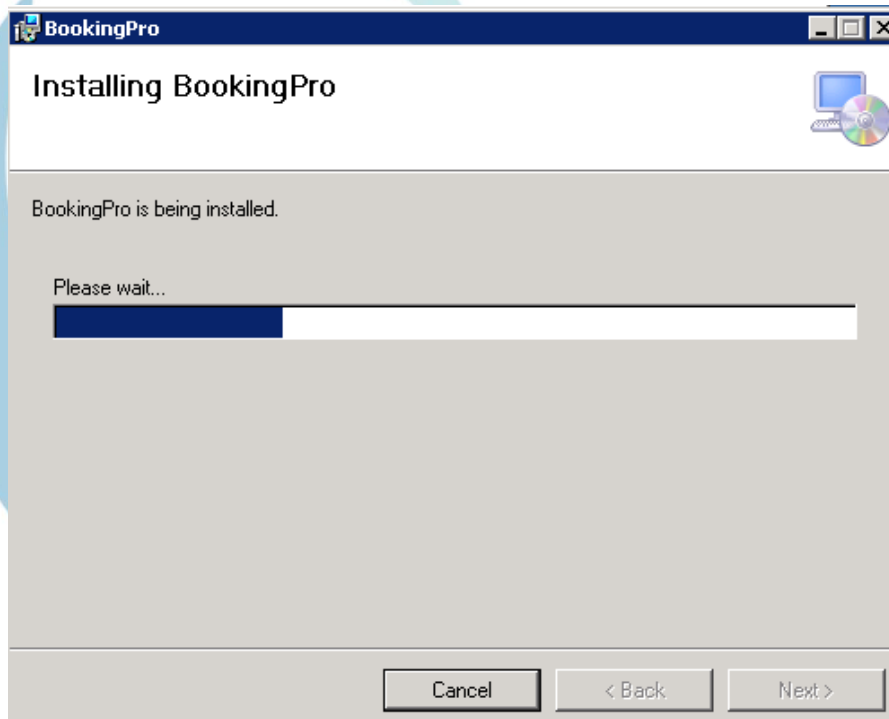
- The installation should now be completed successfully, click **OK**.
- Click on **Close**.
- Next, click on the **BookingPro** icon on your desktop.
- The Setup Wizard will be displayed.



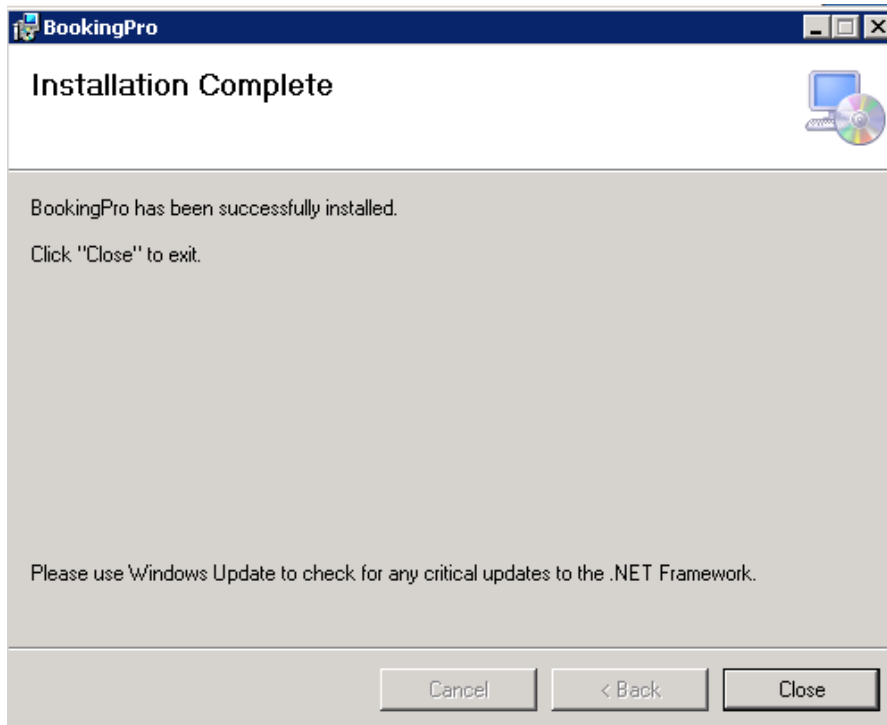
- Click on **Next**.



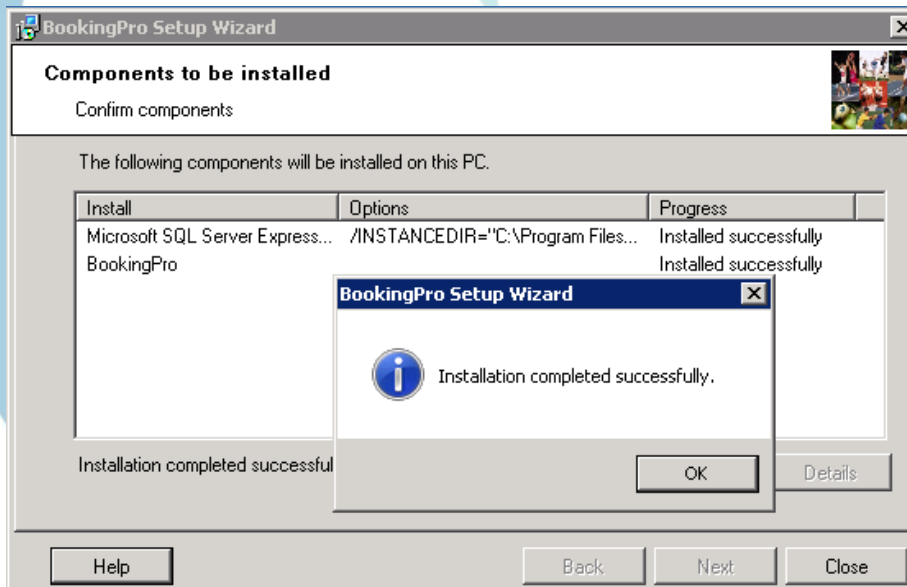
- Click on **Next**.



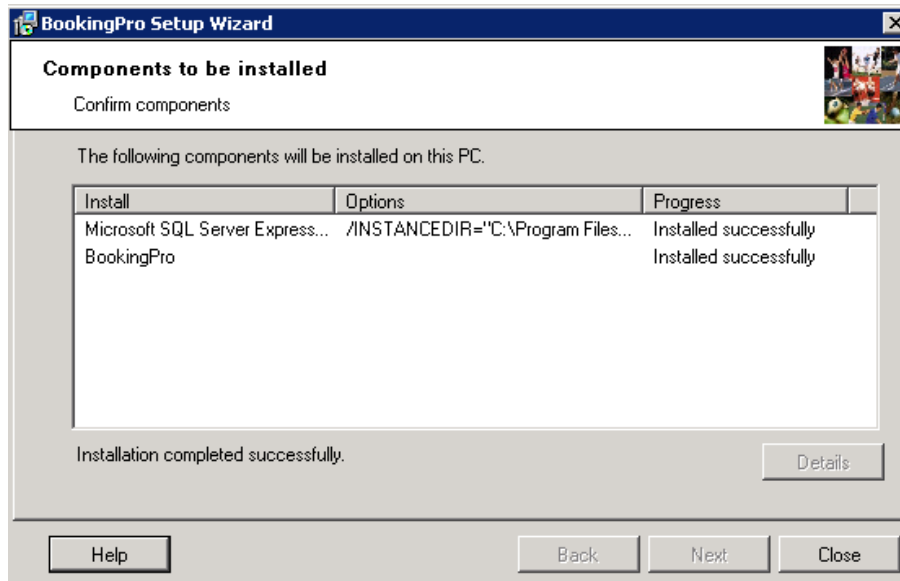
- Click on **Next**.



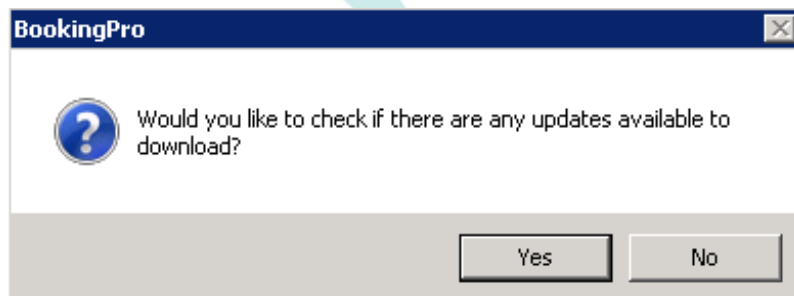
- Click on **Close**.
- The following screen will be displayed.



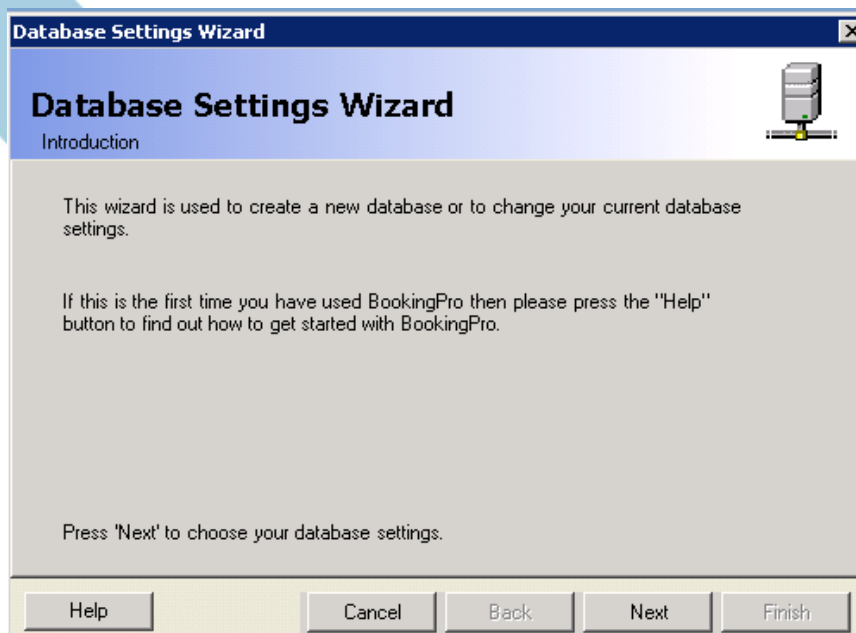
- Click on **OK**.



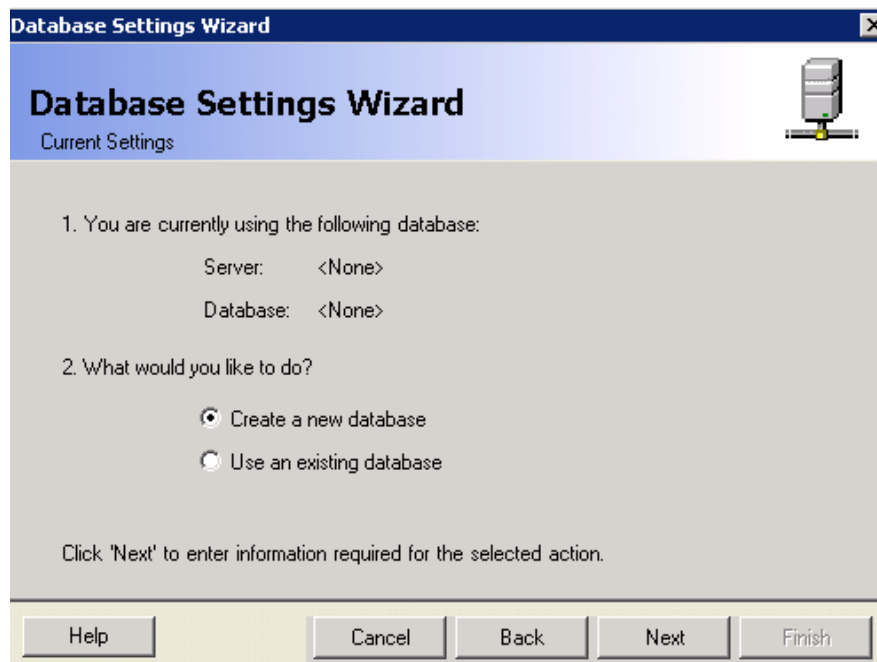
- Click on **Close**.
- Click on **Accept** when the End User Licence Agreement displays.
- **Open BookingPro**. A short cut should now be displayed on your desktop.



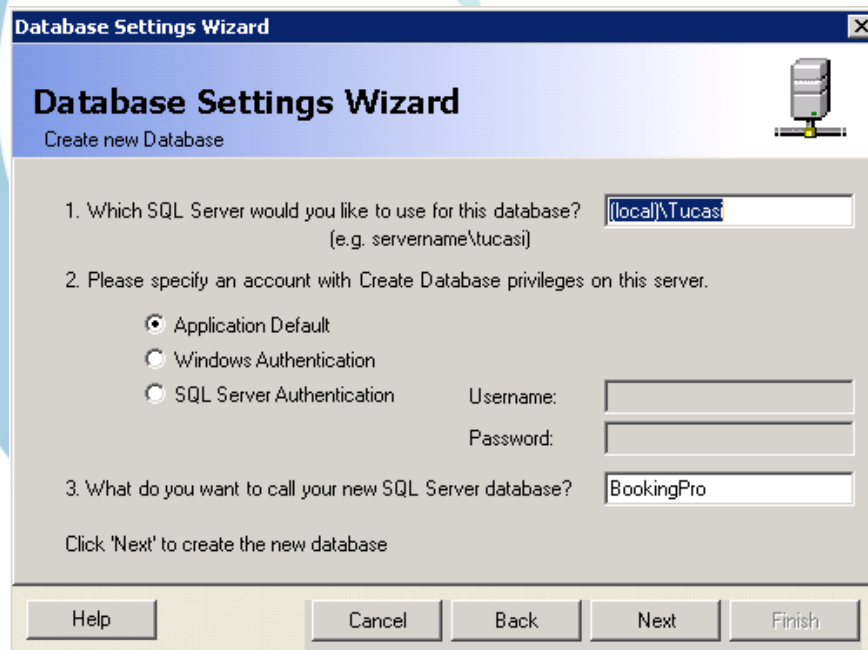
- Click on **No** when it asks you if you want to check for any updates.
- The Database Settings Wizard will now open.



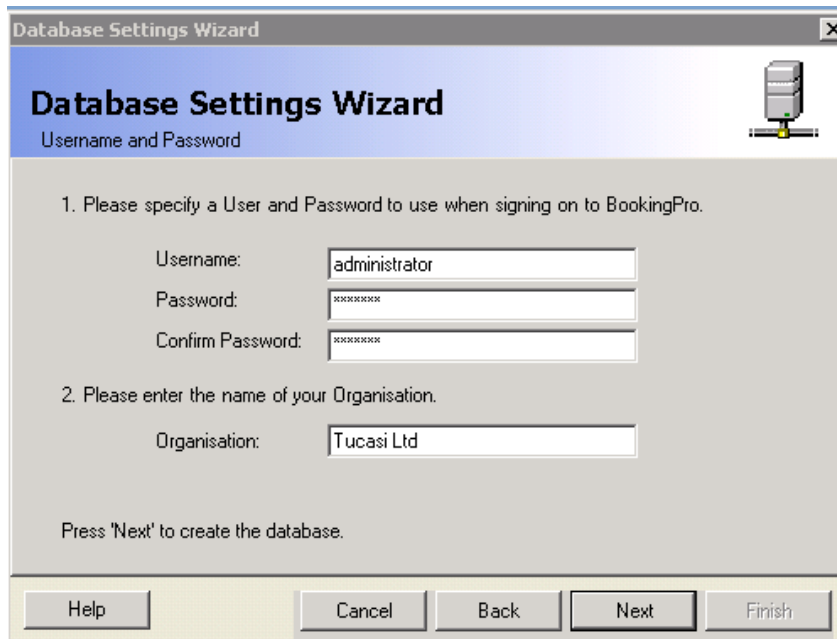
- Click on **Next**.



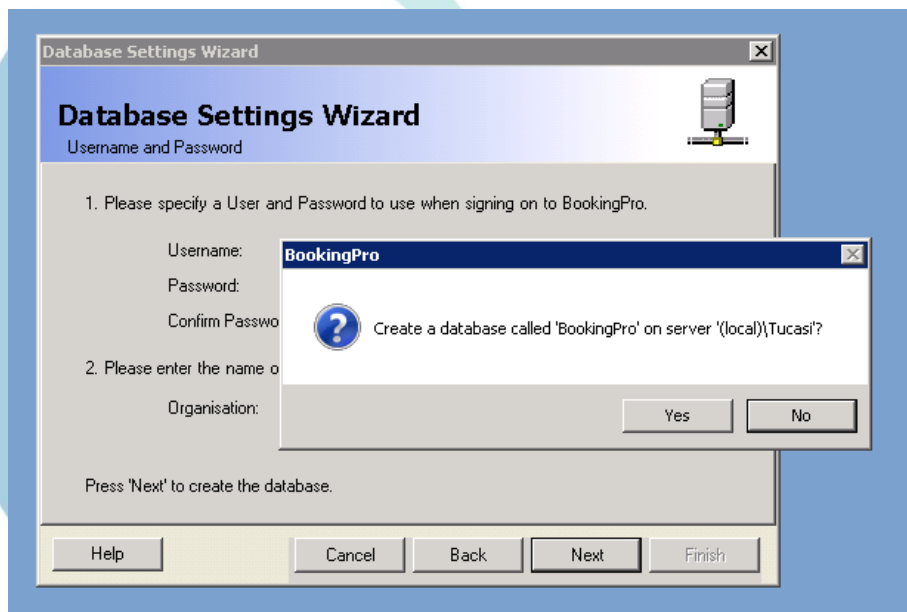
- Select **Create a new database**.
- Click on **Next**.



- Select **Application Default**.
- Click on **Next**.



- Set a **username** and **password**. Also enter your **organisation name**.
- Click on **Next**.



- Click on **Yes**.



- Click on **Finish**.
- You will be asked to save the new settings, click on **Yes**.
- BookingPro will now be installed on the server.

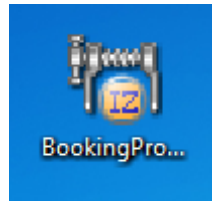
You now need to go back to the following sections:

- Please refer to section 3.3, **Configuring BookingPro on client PCs**.
- Please refer to section 4, **Setting up BookingPro**.

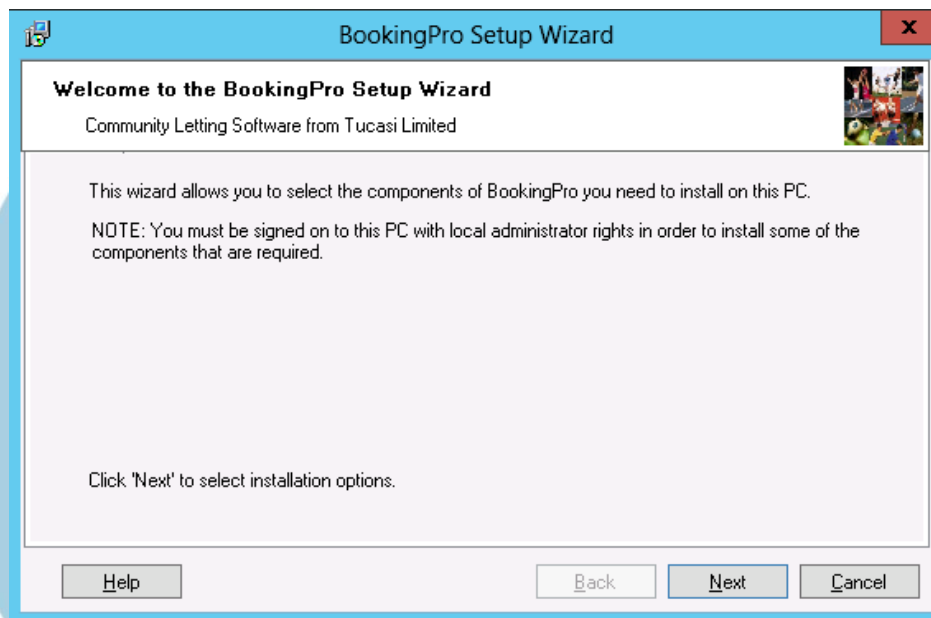
8. Appendix B – Installing BookingPro on Windows Server 2012

You must install BookingPro on the **server** before configuring any **client** PCs.

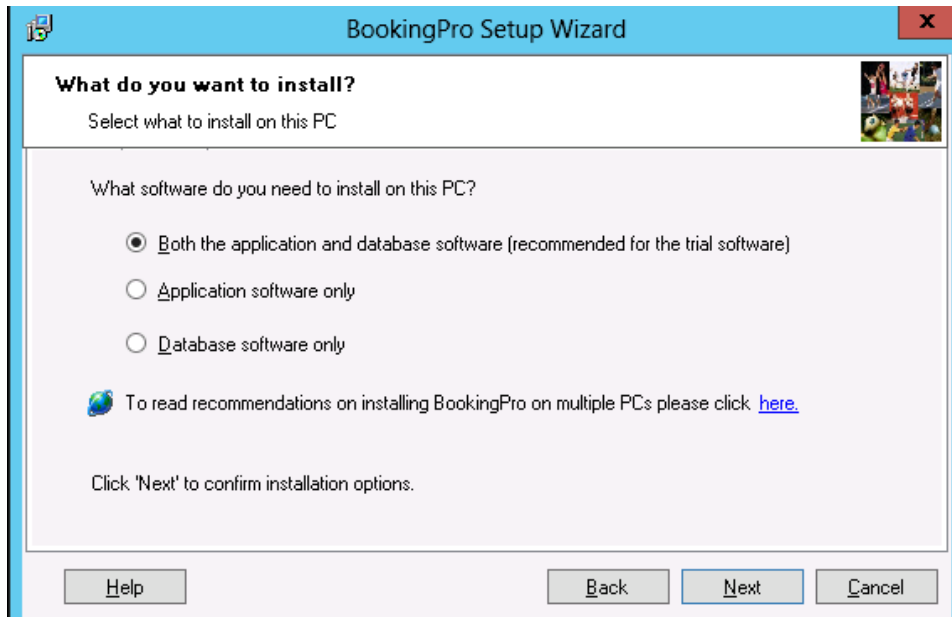
- Log on to the server with local **Administrator** rights.
- Click on the setup folder **download link** as per your installation email.
- Click on the **BookingPro set up file**.



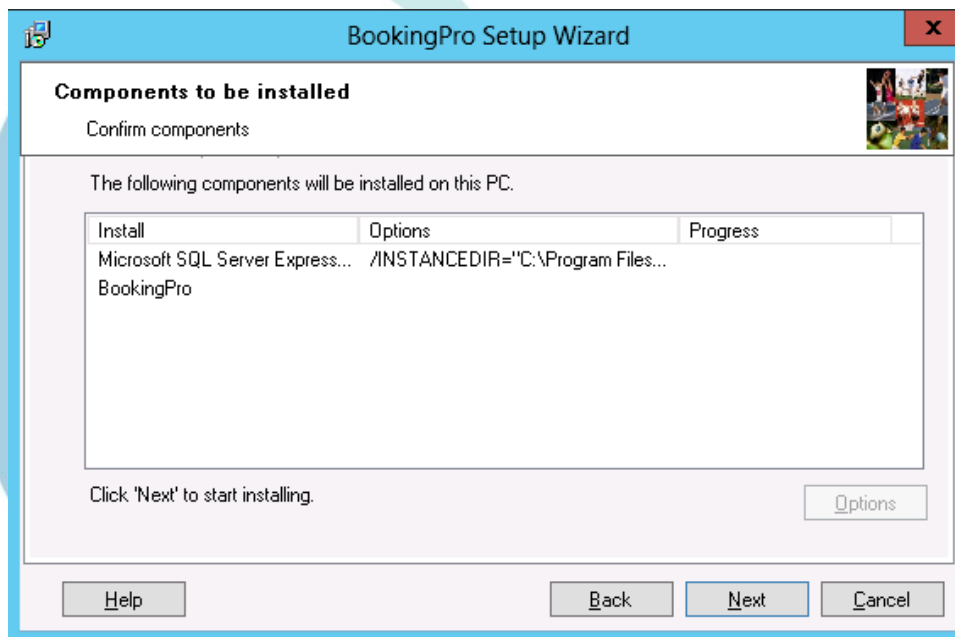
- The **BookingPro Setup Wizard** should start automatically.



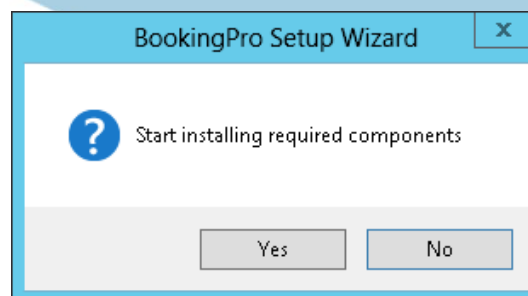
- Click on **Next**.
- Select **Both the application and database software**.



- Click on **Next**.
- If SQL Server Express 2008 is not installed, the following screen will be displayed:

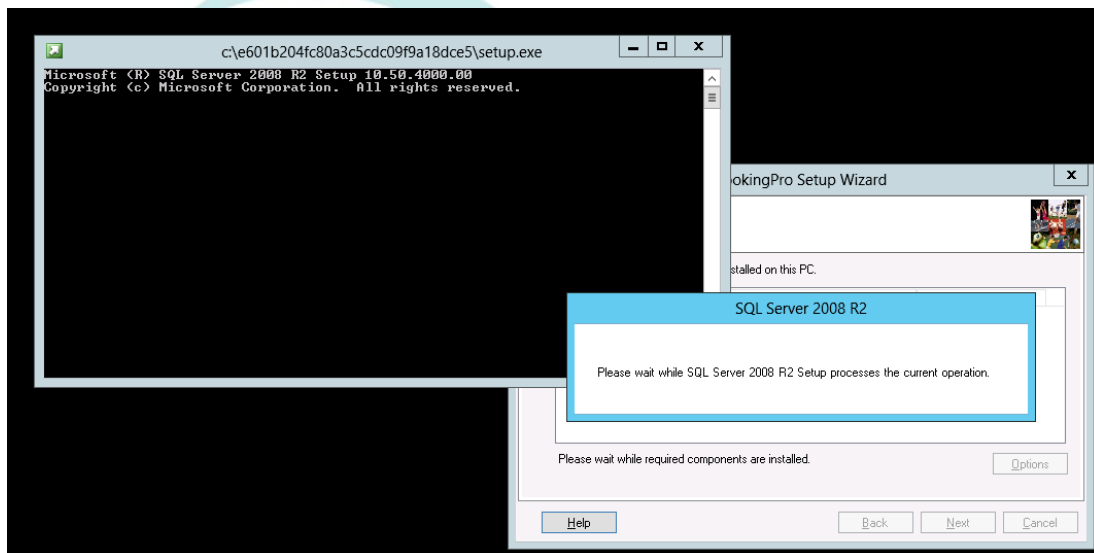
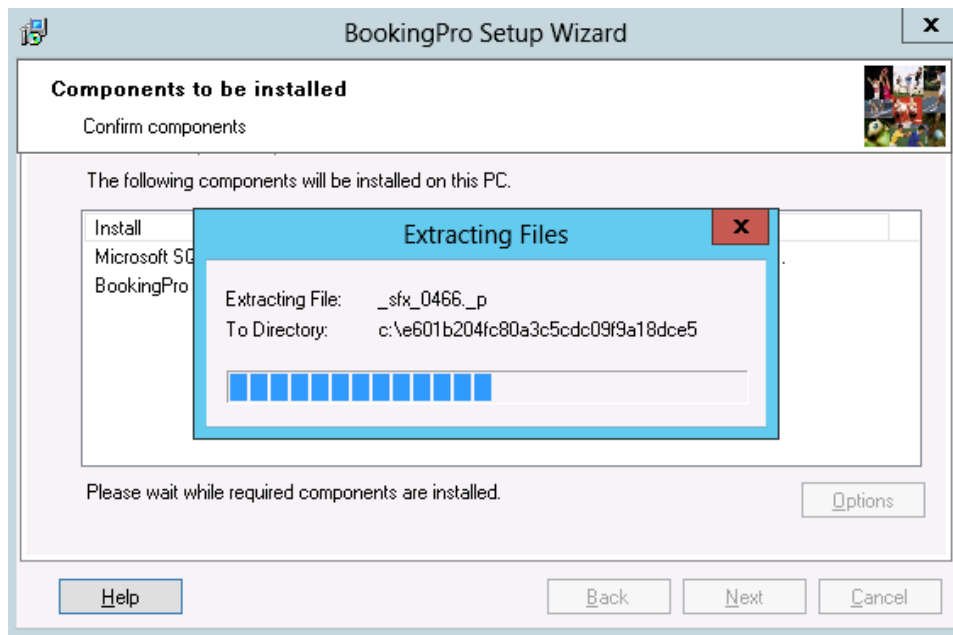


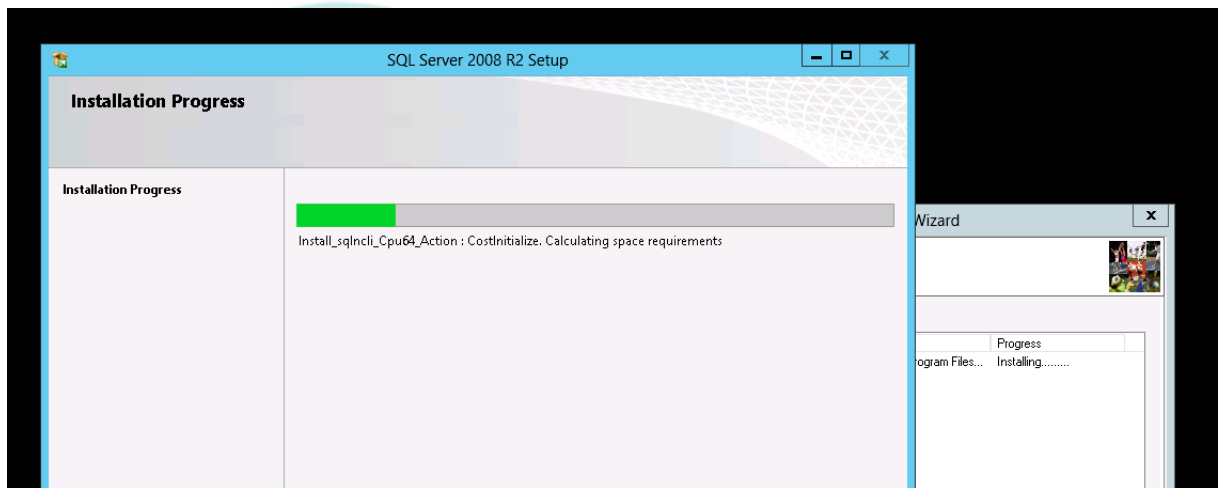
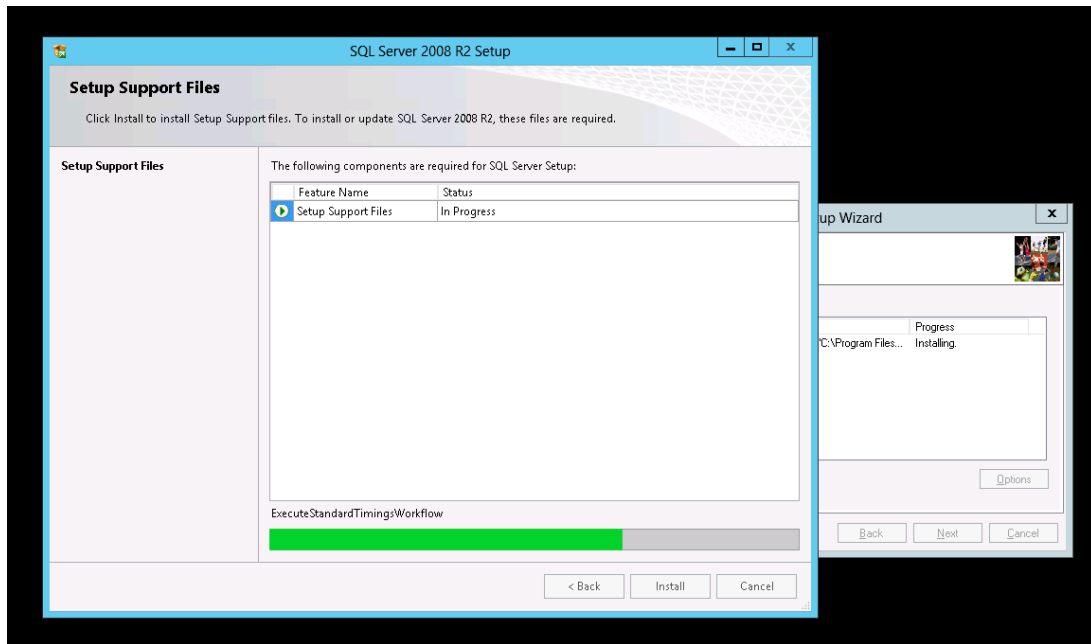
- Click on **Next**.



- Click on **Yes** when the BookingPro Setup Wizard pop up window appears.

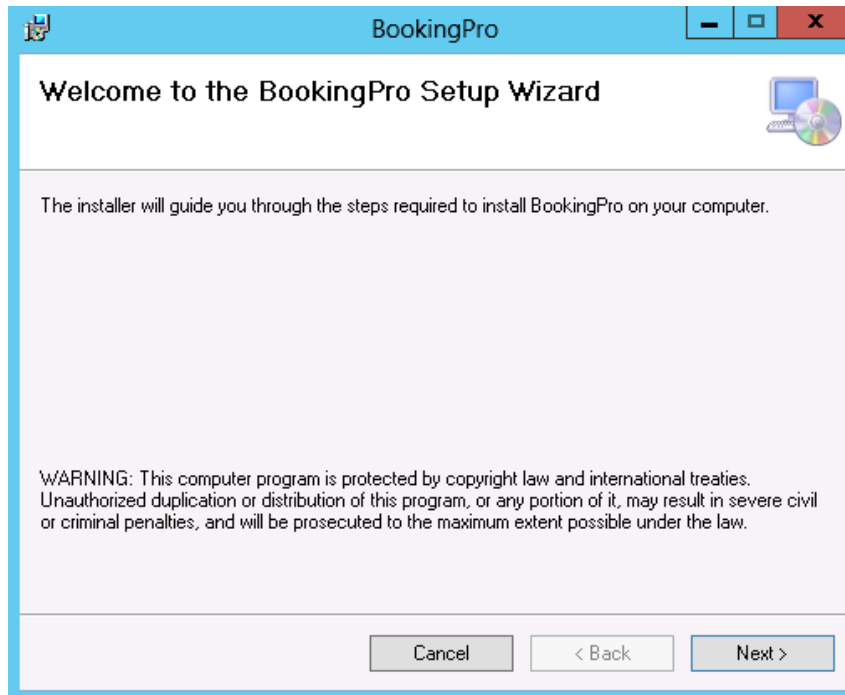
- The following screens will appear in turn.



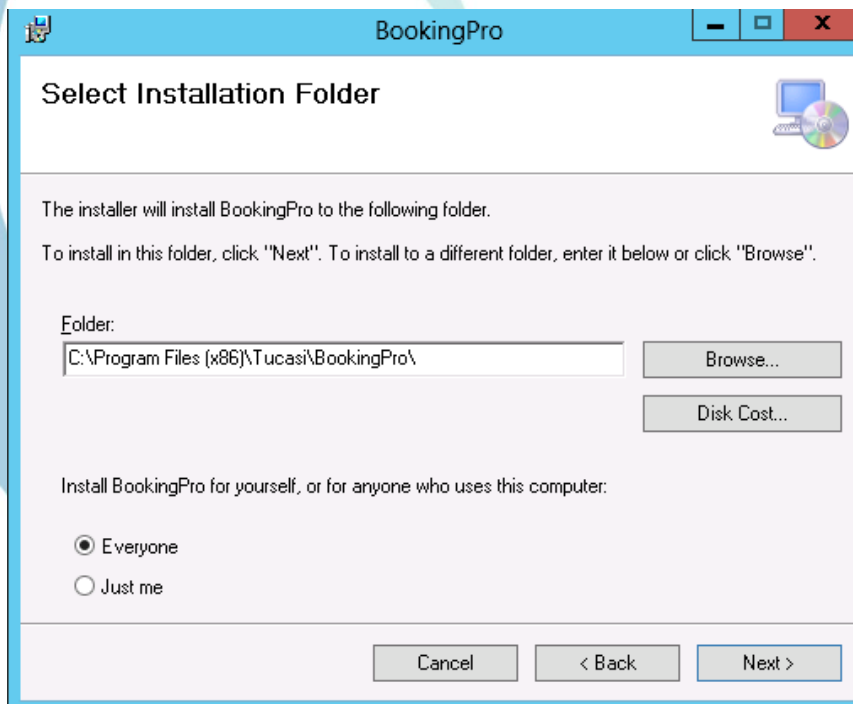


- The installation should now be completed successfully, click **OK**.
- Click on **Close**.
- Next, click on the **BookingPro** icon on your desktop.
- The Setup Wizard will be displayed.

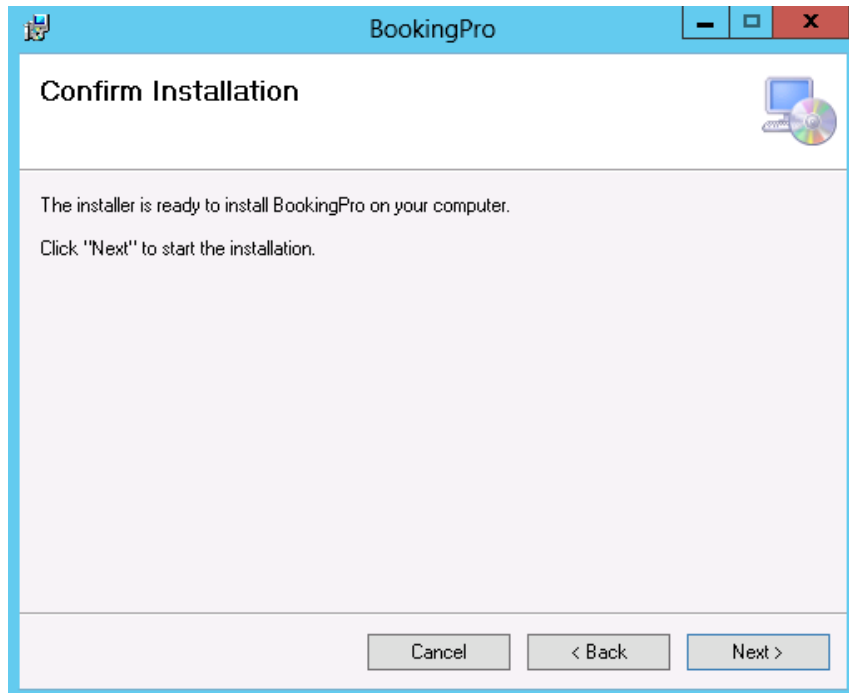




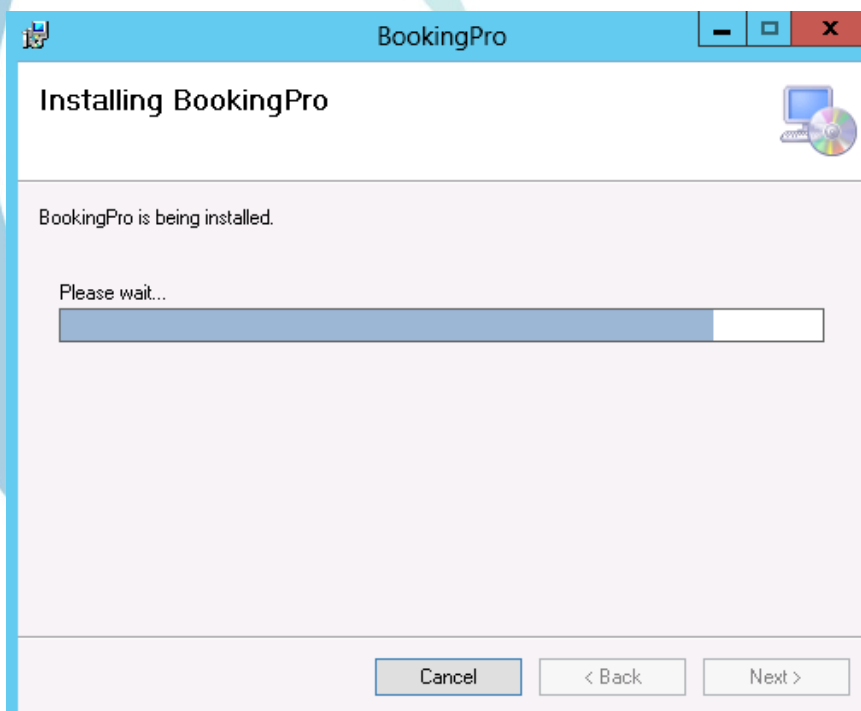
- Click on **Next**.
- Select the required installation path.



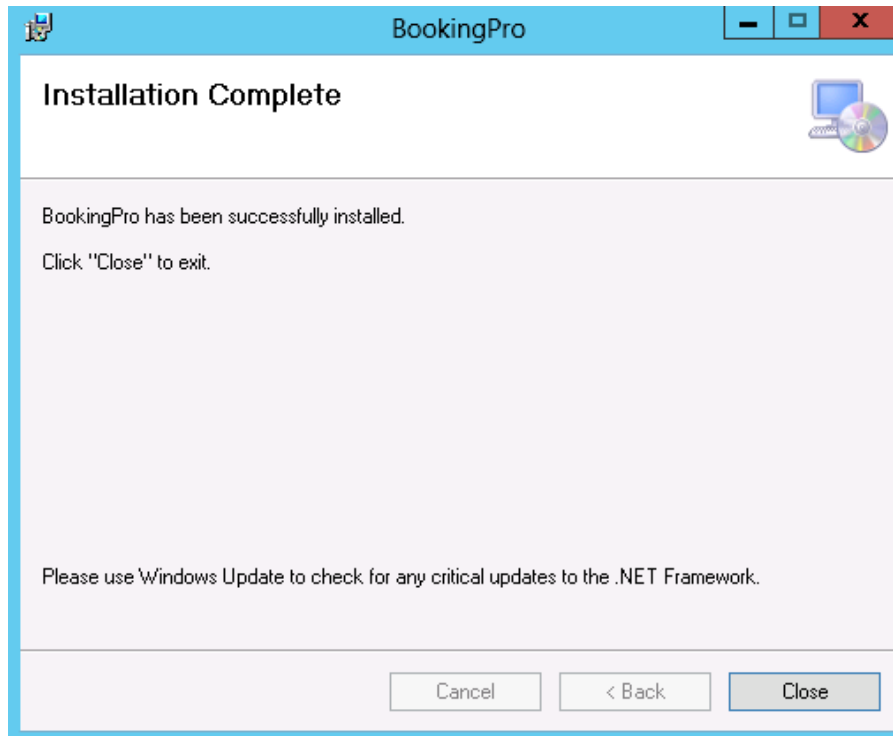
- Click on **Next**.



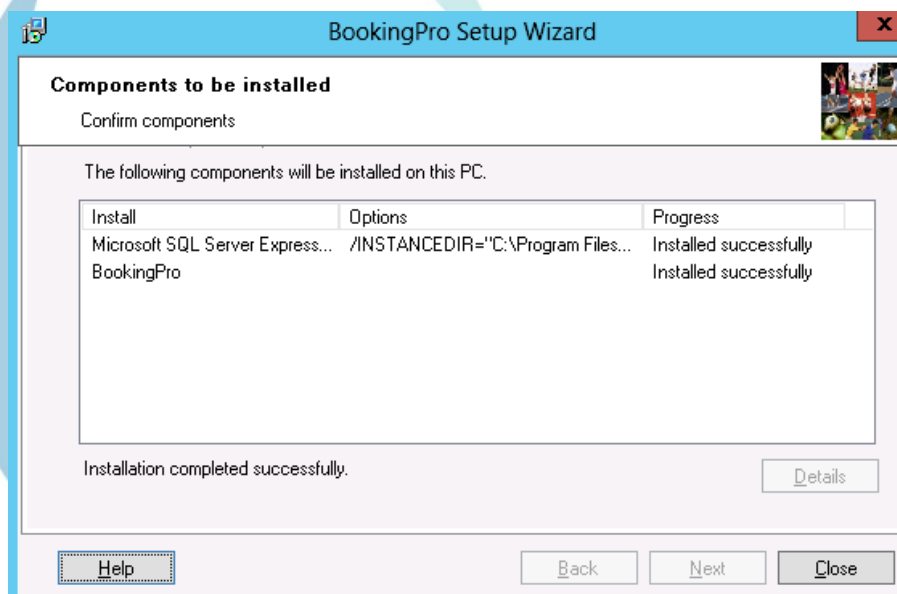
- Click on **Next**.



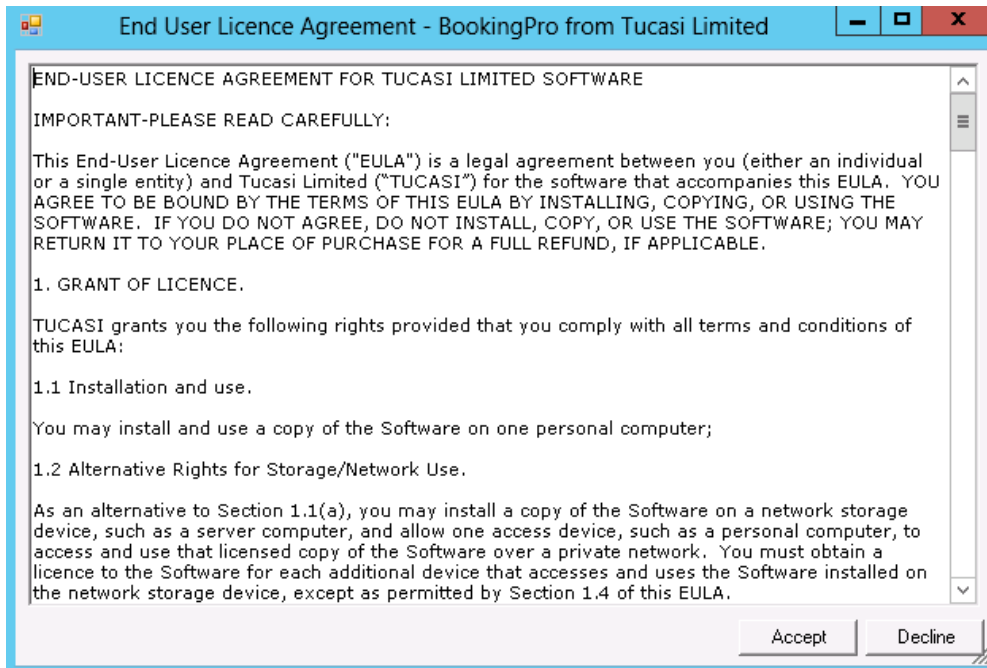
- Click on **Next**.



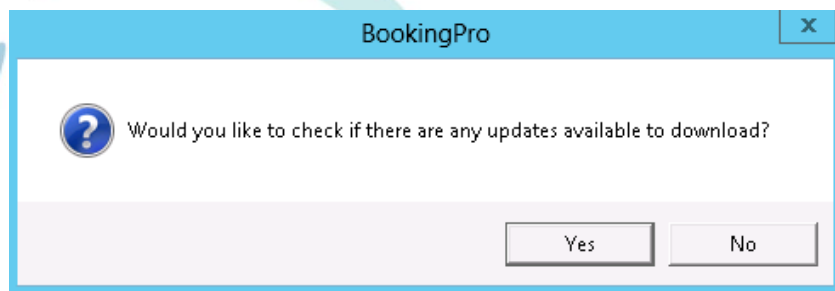
- Click on **Close**.



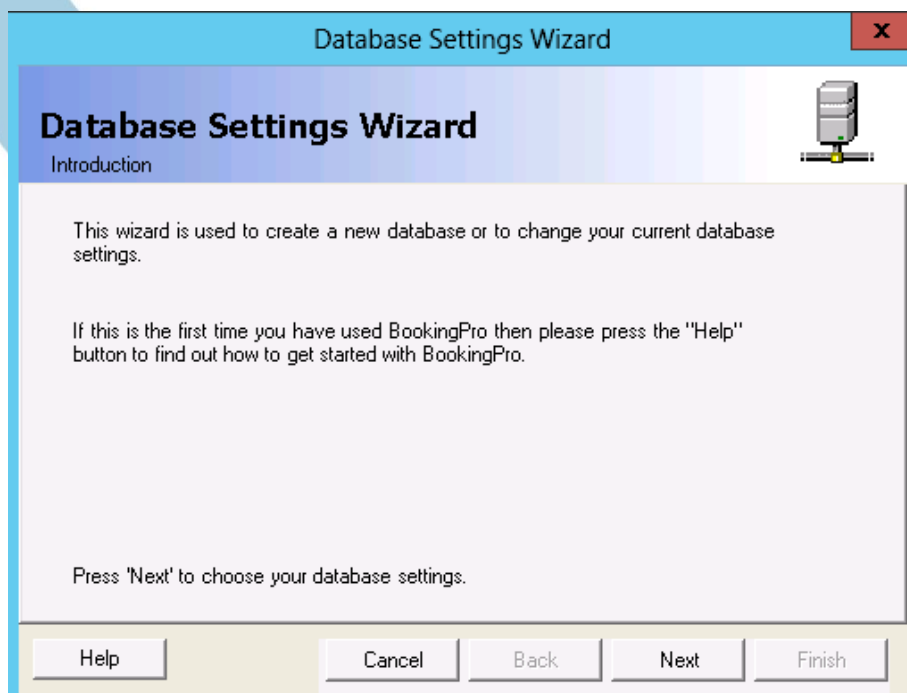
- If the above is still displayed click on **Close**.
- **Open BookingPro**. A shortcut should now be displayed on your desktop.



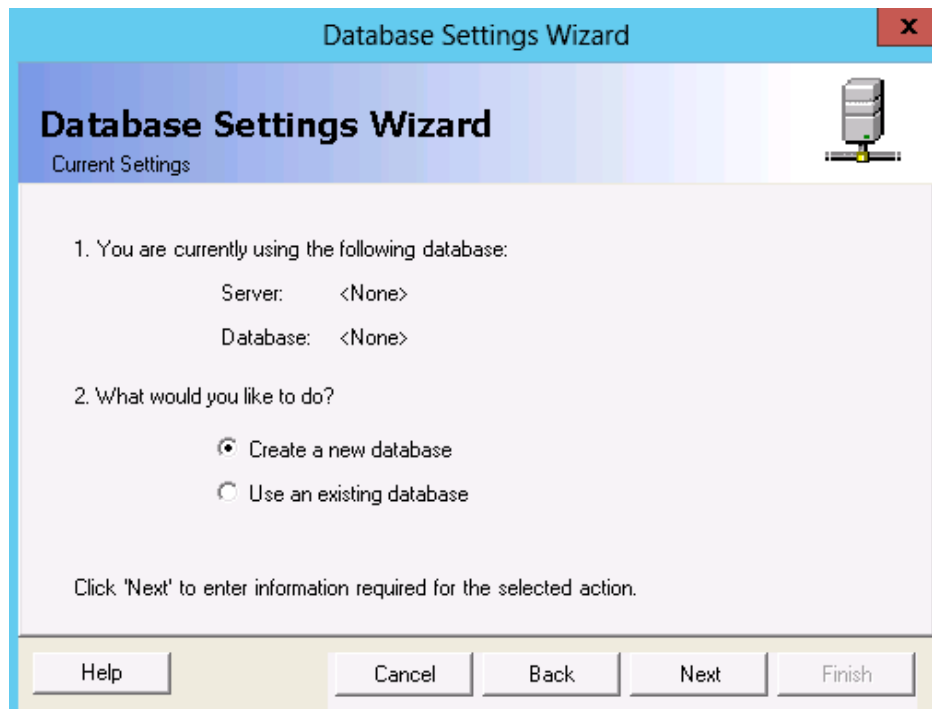
- Click on **Accept**.



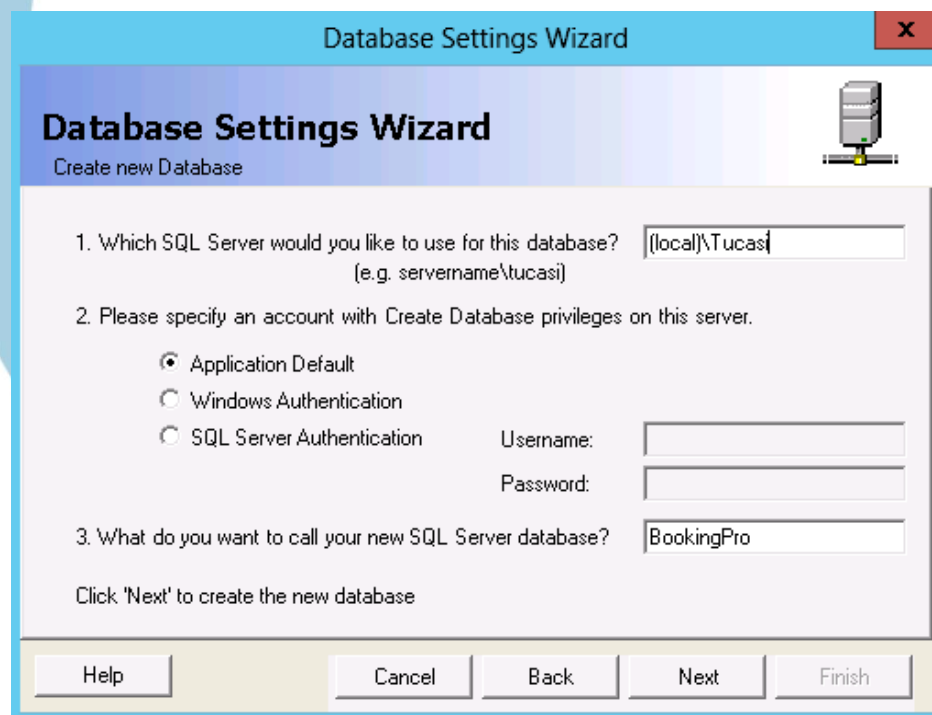
- Click on **No** when it asks you if you want to check for any updates.
- The Database Settings Wizard will now open.



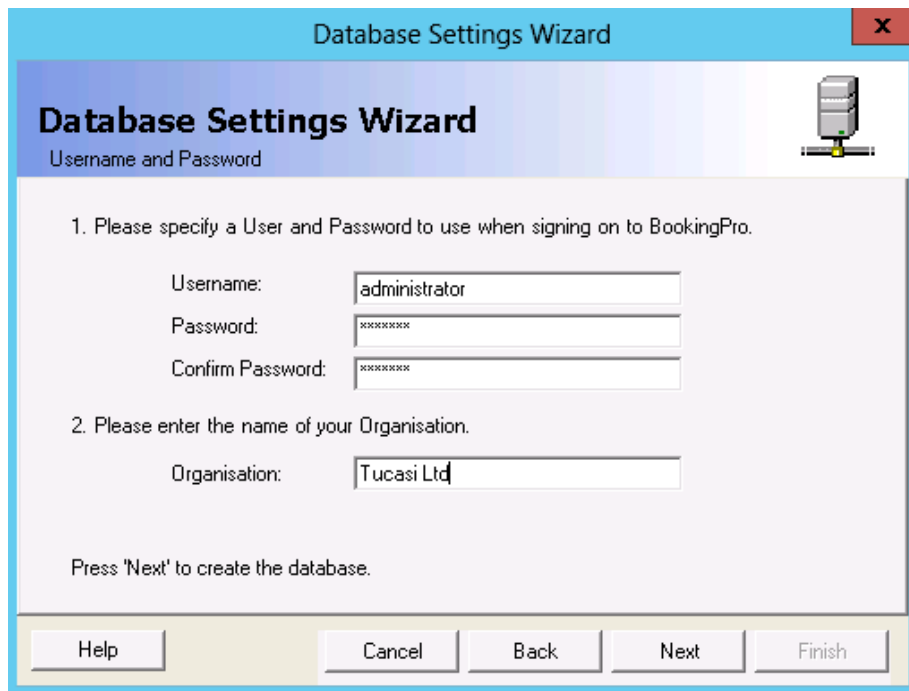
- Click on **Next**.



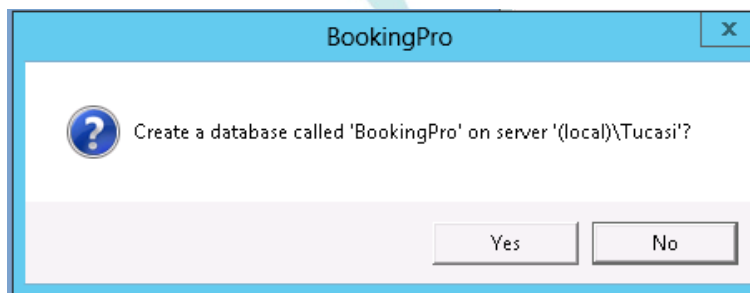
- Select **Create a new database**.
- Click on **Next**.



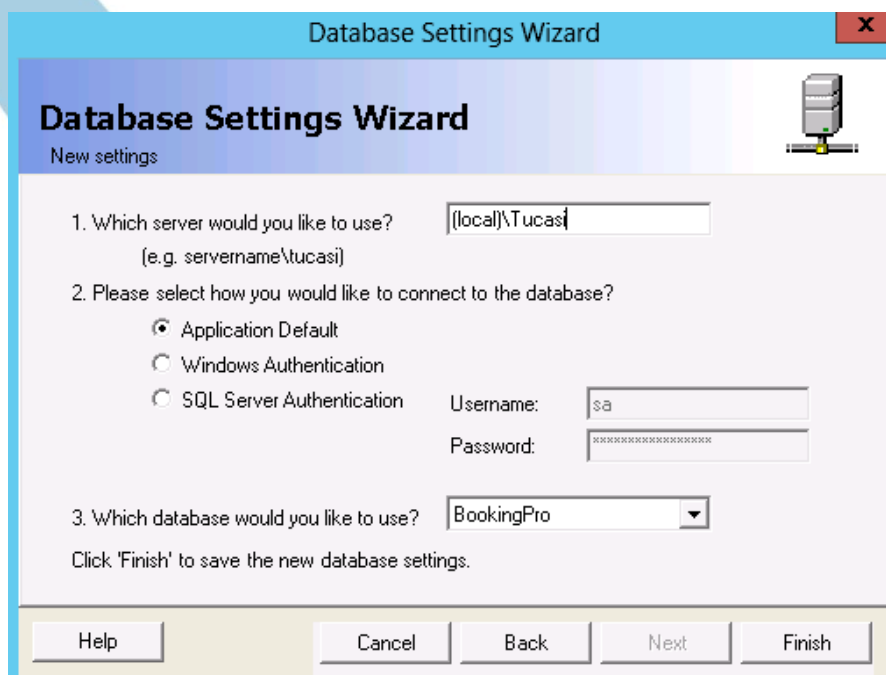
- Select **Application Default**.
- Click on **Next**.



- Set a **username** and **password**. Also enter your **organisation name**.
- Click on **Next**.



- Click on **Yes**.



- Click on **Finish**.
- You will be asked to save the new settings, click on **Yes**.
- BookingPro will now be installed on the server.

You now need to go back to the following sections –

- Please refer to section 3.3, **Configuring BookingPro on client PCs**.
- Please refer to section 4, **Setting up BookingPro**.

9. Support

You may need to contact your IT support organisation for assistance if you encounter any system-related problems, for example with your network or with access rights, or if you are unsure about your network configuration.

If you have any other queries when installing the BookingPro software please contact:

Tucasi Customer Support

Email: support@tucasi.com

 **02380 016 564**

10. Troubleshooting

How can I stop Windows displaying an "Open File - Security Warning" stating that the "Publisher could not be verified"?

To prevent this message being displayed every time you run BookingPro open **Internet Options** in the **Control Panel**, select the **Security** tab, **Local Intranet** and click **Sites** followed by **Advanced**. You can then add the URL of the server you are using for the BookingPro application software (e.g. \\MyServer).