



LEMON BOOKING

GETTING STARTED GUIDE

Purpose- This how to guide has been created as a navigational tool, for the sole use of Lemon Booking customers to enable them to independently manage their own Customer Profile and associated accounts.

Table of contents

1. Your profile
2. Customer details
3. Bookings
4. Invoices & payments

1. Your profile

Topics covered in this section:

- Profile information **(1.1)**
- Switching accounts **(1.2)**
- Change your password **(1.3)**
- Two factor authentication (2FA) **(1.4)**
- Active sessions **(1.5)**
- Delete profile **(1.6)**

1.1 Profile information

If you need to change your email address or have a typo in your name, you can change your details in the [Profile information](#) section on your user profile.

1.2 Switching accounts

If you need to make bookings for different purposes, you can have multiple accounts associated with the same email address. When you log in, you can choose which account you want to use (e.g. personal or work). You can also switch account anytime via the user profile menu. [Switch account](#)

Jane Smith		• Online	 
 Customer account		Local resident	
J.S. Gymnastics & Yoga		Last access: 12 August 2024	SWITCH
 Customer account		Personal trainer	

1.3 Change your password

You can change your password on your profile page under [Update password](#).

1.4 Two factor authentication (2FA)

If you want to make your account more secure, you can enable two factor authentication (2FA). When two factor authentication is enabled, you will be prompted to enter a secure, random token each time you log in. To get these tokens you must install the [Google Authenticator](#) app or the [Microsoft Authenticator](#) app on your phone.



Advanced feature

Once you enable two factor authentication you will not be able to access your account without it.

1.5 Active sessions

If necessary, you may logout of all of your other browser sessions across all of your devices. If your account may have been compromised, you should also update your password.

1.6 Delete profile

Once your profile is deleted, all of its resources and data will be permanently deleted. Before deleting your profile, please download any data that you wish to retain. Please note that we may retain some personal information for our record keeping as required by law. If you would you like to know more, you can contact us at office@bristolcharities.org.uk.

2. Customer details

Topics covered in this section:

- Customer accounts **(2.1)**
- Default billing address **(2.2)**
- Refunds **(2.3)**

2.1 Customer accounts

If you wish, you can choose to share your customer account with another person. This could be a family member in the case of a personal account or a colleague for a work account. You can invite people to share your customer account from the [Customer profile](#) page.

2.2 Default billing address

When you make a booking request, you will be asked to provide your address for invoicing purposes. You can choose whether you would like the system to save and pre-fill your address for future booking requests. You can edit your default billing address on your customer profile.

2.3 Refunds

A deposit may be required for some bookings. If this is the case, your deposit - providing all conditions are met - will normally be returned to the bank account you specify in the [Bank account](#) section in your customer profile. If you pay online with PayPal or Stripe, your refund may be handled directly by these services and returned to the card you used to pay with.

Bank account

This information is used to provide refunds.

NAME OF BANK	ACCOUNT HOLDER
SORT CODE	ACCOUNT NUMBER

3. Bookings

Topics covered in this section:

- Making a booking request **(3.1)**
- Managing your bookings **(3.2)**
- Changing a booking request **(3.3)**
- Cancellations **(3.4)**

3.1 Making a booking request

You can request access to our facilities by [submitting a booking request](#) on our website. (See Video Tutorial [HERE](#) for further guidance on how to submit a booking request form).

You will be asked to provide details about the type of activity/event you wish to hold, the dates & times that are required and how many people you expect to attend. Please be as detailed as possible as this will enable our admin team to make a prompt assessment of your booking request.

Once you have submitted a booking request, our admin team will review your request, confirm the price and availability of your time slots & equipment and reply to you as soon as possible.

Please note that your booking request is not confirmed until it has been approved and we have received payment for your booking.

3.2 Managing your bookings

You can find an overview of all your pending booking requests, approved bookings and cancellations on the [Your bookings](#) page. You can download a PDF summary for each booking (& booking request) by clicking on the 'Download' icon at the end of each row.

3.3 Changing a booking request

You can make changes to your booking requests up until the point they are approved (or declined) by a member of staff. You can add or remove time slots, select additional equipment & services and provide more information for staff about your booking request.

You can change a **pending** booking request by going to the [Your bookings](#) page and clicking on the cog icon next to the booking request that you want to change.

Please contact a member of staff to request amendments or cancellation for a booking which has been approved.

3.4 Cancellations

Please notify us as soon as possible if you need to cancel or amend one of your bookings. In some cases you may be charged for a cancellation. Please check our [terms of hire](#) for more details. If you need to get in touch with us, you can use the contact information at the bottom of this page.

4. Invoices & payments

Topics covered in this section-

- 4.1 Viewing your invoices (4.1)
- 4.2 Making a payment (4.2)
- 4.3 Downloading a receipt (4.3)

4.1 Viewing your invoices

You can find copies of all the invoices and credit notes you have been issued on the [Your invoices](#) page including the payment status and due date of each invoice. If you have not paid an invoice, you can see the details for it by clicking the "Pay" button **[4.2]**. If you have paid an invoice, you can download and view it (PDF format) by clicking on the download icon. Most modern internet browsers (Chrome, Safari etc.) can open PDF files.

If you can't view your invoices, you can download [Adobe Reader](#) for free.

4.2 Making a payment

You will find a "Pay" button next to each unpaid invoice on the [Your invoices](#) page. When you click "Pay" you will have a chance to review the booking details, total amount and payment terms before making your payment.

In some cases it is possible to pay an invoice online with SumUp. If this option is available to you, you will be presented with the opportunity to pay online when you click "Pay". If online payment is required by the system but you are unable to pay this way, please contact our admin team for assistance.

4.3 Downloading a receipt

We generate a receipt every time you make a payment. If you wish to download receipts for your own records, you can find them by going to [Your invoices](#) and clicking the receipt icon next to each 'Paid' invoice.

Another question?

If you haven't been able to find an answer to your question in our help guide, you are welcome to contact us for further assistance.

You can contact us as follows:

General enquiries: office@bristolcharities.org.uk

Phone: 0117 965 9630