



# Help Documentation

<https://mid.as/help>

v4.30

*...making your facilities work for you!*



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# Getting Started

## About This Documentation

This is the complete offline documentation for MIDAS, a complete web-based room and resource scheduling solution, available through <https://mid.as>

The online version of this documentation may be viewed at <https://mid.as/help>



NOTE: This offline documentation relates to MIDAS v4.30. For updates and older versions, please visit <https://mid.as/manuals>

## Conventions used in this documentation

A number of helpful boxes appear within this documentation, their meanings are as follows:



General Information / Additional Notes



Tips & Tricks



Warnings



See Also / Further Reading / Links



NOTE: Depending upon the [permissions](#) that have been setup for you by your MIDAS Administrator, not all the functions and features outlined in this documentation may be available to you



NOTE: Icons and images within in this help documentation assume MIDAS is running in the "Default" visual theme. If you're running MIDAS with a different theme, icons and images may differ from those shown

## System Requirements

We offer two editions of MIDAS, a "self-hosted" edition as well as a "cloud-hosted" edition.

For our "cloud-hosted" edition, there's nothing to install! - All you need to be able to use MIDAS is a connection to the internet and a modern web browser, and all major browsers are supported too!



Google  
Chrome



Microsoft Edge



Mozilla  
Firefox



Apple Safari



Opera

Recommended Version	99+	99+	97+	15+	84+
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Your browser should also have JavaScript and Cookies enabled.

For our "self-hosted" software edition (where MIDAS is instead installed and run on your own server), in addition to the above browser requirements, your server will need to meet the minimum server requirements.


➔ See Also: [Minimum Server Requirements](#)

## Logging in and out

You can access MIDAS by entering the URL (internet address) of your MIDAS into your web browser's address/location bar and selecting "Go" or pressing "Enter".

If you've entered the correct URL, you should see a login screen similar to this:

The login screen has a light blue background. At the top center is the MIDAS logo, which includes the text 'v4.26', 'By M.Harrington', '©2005-2020', and 'https://mid.as'. Below the logo is a white rounded rectangle containing four input fields: 'e-mail:', 'Password:', 'Language:' (with a dropdown menu showing 'English (US)'), and 'Theme:' (with a dropdown menu showing 'Default'). Below these fields is a blue 'Login' button with a white right-pointing arrow. At the bottom of the screen are four links: 'Remember Me?' (with a checked checkbox), 'Auto-Login?' (with an unchecked checkbox), 'Forgot Your Password?', and 'Help Full Screen'.

 If you have enabled and correctly configured Single-Sign On (Active Directory) authentication, you won't see a login screen, as you'll automatically be logged in each time you open MIDAS

To login to MIDAS, please enter your email address and MIDAS password.

 **Remember, your password is case sensitive**


If multiple databases have been setup for your version of MIDAS, you may also be presented with an option to select which database you wish to login to from a drop-down list of databases.

If your MIDAS administrator has enabled the multiple languages feature, you may also be able to select the display language for MIDAS from a "Language" drop-down list.

If your MIDAS administrator has enabled the multiple themes feature, you may also be able to select a visual "theme" for your MIDAS experience.

Select the "Remember Me?" option to have your browser remember your username, password, language, and theme settings for the next time you login to MIDAS on that computer.

If you select the "Remember Me?" option, a further "Auto-Login?" option will be shown. Selecting "Auto-Login" before you login will mean that even if you close your browser, the next time you open it and navigate to your MIDAS, you will bypass the log in screen and be logged in automatically.

 **Tip:** If multiple MIDAS users will be accessing MIDAS from the same shared device, you should consider disabling the "Remember Me" and "Auto-Login" options – see [Managing Security Settings](#)

To then login to MIDAS click/tap the "Login" button.

Your MIDAS administrator may have enabled [two-factor authentication](#) for your system, in which case when you click "Login" you will be emailed an Authorization Code which will need to be entered to complete the login process.

 **MIDAS Knowledge Base:** [Two-Factor Authentication in MIDAS](#)

Your MIDAS administrator may also have set up your account to prompt you to change your password upon your first login.

If your browser supports "Full Screen" mode, clicking/tapping the "Full Screen" link will maximize MIDAS to fill your entire screen (You can exit full screen mode at any time by selecting an "Exit Full Screen" link or by hitting Esc).

Once logged in, you may log out of MIDAS at any time by using the "Logout" link under the main date near the top of the window.

## Resetting a Lost Password

If you cannot remember your MIDAS password, use the "Forgot Your Password?" link on the login screen.

You will then be prompted to enter your email address, and MIDAS will then automatically email you a password reset link.

Once you receive this email, click the password reset link contained within. You will then be promoted to enter a new password before logging into MIDAS.



If you do not receive a password reset email, please check your spam/junk folder. If you've still not received a password reset email, then it's possible that either your MIDAS system has not been correctly [configured for sending email](#), or that the email address you entered isn't associated with an existing user account in your MIDAS system. In these circumstances, please contact your organization's MIDAS administrator, who will be able to reset your password for you

## Changing Your Password

To change your password at any time, use the [Change Password] link near the top of the main window when logged in.

You will then be prompted to enter your current password, followed by your desired new password.

 If you have enabled Single-Sign On (Active Directory) authentication, the "Change Password" option is not shown


## Managing Your Sessions

If the multi-session (Allow Multiple Logins By Users) feature has been enabled for your MIDAS, then you'll be able to login to the system from multiple devices simultaneously.

Once logged in, you can click/tap your "logged in as" name near the top of the main window to view/manage all the devices your account is currently logged into MIDAS from.

The list will show when the last activity in MIDAS occurred from each device, as well as indicating the device's IP and Browser/OS. The highlighted entry denotes your current session.

You can remotely log out any of these sessions by clicking/tapping the adjacent  icon

 See Also: [Managing Security Settings](#)

 MIDAS Knowledge Base: [Tips for keeping your MIDAS secure](#)



## The Main Window



Once you login to MIDAS, you'll see a screen similar to the above. The majority of this screen is occupied by the "booking grid" - a graphical representation of bookings for the selected date(s). In the "booking grid", your venues are stacked vertically down the left-hand side and the times of day are across the top (the "Timeline"). The position of booking "blocks" within the grid denotes their time and venue. Blocks can also be color-coded to allow them to be easily identifiable in the booking grid.

## The Calendar



In the top left corner of the window (on a landscape-orientated device), or bottom left corner (on a portrait-orientated device) is the navigation calendar.

You use this to select the date, or date range to view in the booking grid.

- ➡ Jumps forward a month
- ⬅ Jumps back a month

Selecting the Month or Year heading at the top of the calendar will allow you to quickly "jump" to specific months/years.

Clicking/tapping on the "Today" button below the calendar at any time will jump you back to the current day if not already selected.

## The Booking Information Panel

The "Booking Information Panel" is located on the left-hand side of the screen directly beneath the navigation calendar on landscape-orientated devices, and at the bottom to the right of the calendar on portrait-orientated devices. This panel displays a wealth of information about any booking you "hover" your mouse over (or tap) in the booking grid.

The Booking Information Panel has three tabs:

Booking
History
Client

Start: 22/2/2021 @ 08:00  
Finish: 22/2/2021 @ 10:30  
Venue: Meeting Room 3  
Client: Admin User  
(MIDAS Demo)  
Attendees: 25  
Type: Corporate  
Notes: PST Training  
Resources: x1 Data Projector  
x3 Flipchart  
x1 Laptop  
x1 Security Guard  
Invoice: MIDAS0486

## Booking

Displays specifics about the selected booking, including venue, times, attendees, notes, resources, and any [custom booking fields](#).

## History

Displays the history of the selected booking. Whenever a booking is modified, MIDAS will log the date and time of the modification as well as the user responsible for the update.


## Client

Displays extended information about the client that the booking is for, including their address, email, phone/fax numbers, and any [custom client fields](#).

A list of other dates the client has bookings on is also shown on the Client tab, which can be clicked/tapped to "jump" to that date in the booking grid



Additionally, a list of the client's paid/outstanding invoices may also be shown on this tab, each of which can be clicked/tapped to view the corresponding invoice.



Tip: Selecting the  icon in the top-right corner of the Booking Information Panel will "pin" the current details shown in the panel. Details will then no longer disappear when the mouse moves away from a booking block in the booking grid! Once the panel has been "pinned", you will then be able to interact with the information within - for example, if an invoice is attached to the booking, you'll be able to jump straight to that invoice, or from the "Client" tab, you'll be able to email the client directly by clicking/tapping on their email address, or instantly jump to other dates where the client has bookings.











To "unpin" information from the Booking Information Panel, simply select the  icon again.



Tip: If you have permission to print in MIDAS, and the "pin" option is enabled in the Booking Information Panel, then adjacent to the  icon, you'll also see a small print  icon. This can be used to quickly print out the information in the currently selected tab in the Booking Information Panel.

## The Toolbar Icons

The main toolbar in the top right of the screen will contain some or all of the following icons (depending upon your user permissions):

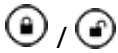
-  [Add Booking\(s\)](#)
-  [Pending Booking Requests](#)
-  [Notification Center](#)
-  [Search](#)
-  [Recent Activity](#)
-  [Statistics](#)
-  [Print](#)
-  [Invoicing](#)
-  [MIDAS Admin Options](#)
-  [Print Emergency Evacuation Data](#)

## View Options



Near the top right of the screen are a number of options that control the display of the booking grid and how you interact with it. First off, a "View" drop-down menu allows you to "filter" which group of venues are shown in the booking. For example, you can choose to show only those venues with bookings for that particular date (In Use), or certain "groups" of venues. (To define "venue groups" please see [Managing Venues](#)). The other option present in this "View" list is "Clients". If this is selected, the booking grid will change to show clients instead of venues on the vertical axis of the booking grid.

Alongside the "View" drop-down, some or all of the following icons may be present (depending upon your user permissions)



### **Lock / Unlock Grid**



Selecting this icon will present you with a choice of Dynamic Grid Editing modes:

**Disabled** – Dynamic Grid Editing Disabled.

**Unlock Grid (Move)** – When selected will then allow you to "move" (reschedule) bookings in the booking grid by simply "dragging" them to new positions.

**Unlock Grid (Duplicate)** – When selected will then allow you to "duplicate" (copy) a booking in the booking grid to a new slot by simply "dragging" it.

**Retain Start Time** – This option is used in conjunction with the Move/Duplicate editing options above. With "Retain Start Time" also selected, moved or duplicated bookings will retain the start time of the original booking. For example, if a booking that starts at 9am on a Monday is "dragged" to any point on Tuesday, its start time will automatically be adjusted to 9am. Without "Retain Start Time" selected, the start time of moved or duplicated booking will depend upon the precise position in the grid where they are "dropped".

When Dynamic Grid Editing is disabled, the  icon will show and it will not be possible to "drag" bookings around the booking grid. When Dynamic Grid Editing is enabled, the icon will change to show .



### **Show Pending Bookings**

If selected, the Booking Grid will also display "Booking Requests" along with actual bookings.



### **Show Deleted Bookings**

If selected, the Booking Grid will also display bookings that have been recently deleted along with actual bookings.

## **Day View**

Display between 1 and 14 days at a time in the booking grid (Use the selector immediately above the list of venues stacked vertically to the left of the booking grid to change the number of days shown in the grid at any one time).



Note: The multi-day selector will only be available if the hours you have access to in your booking grid run Midnight-Midnight. If your hours have been restricted to only show a portion of each day the multi-day selector will not be available to you.

## **Month View**

Display one month at a time in the booking grid.

## The Booking "Grid"

The majority of the main window is taken up with the "booking grid" - a visual depiction of bookings for the current date/time range.

Each booking "block" may be color-coded to denote its type.

"Hovering" your mouse over a booking in the grid, clicking, or tapping a booking will display additional information in the Booking Information Panel.

Clicking/tapping a booking "block" may (depending upon your account permissions) present you with options allowing you to, for example, modify or delete the booking.

Clicking/tapping and "dragging" a block when the booking grid is "unlocked" will allow you to "move" (reschedule) or "copy" (duplicate) the booking.




See Also: [Modifying Bookings](#)

Clicking/tapping and "dragging" across a blank area of the booking grid when its "unlocked" will take you directly to the "Add Bookings" screen with the venue, start and finish times you dragged across pre-selected.

## Bookings

### Adding Bookings

There are a couple of ways to add new bookings to MIDAS:

1. Click/tap the "Add Booking" icon  in the toolbar. This will display the "Add Booking(s)" screen.
2. Click and drag your mouse (or tap and drag with your finger, if using a touch screen) across an empty area of the Booking Grid to create a booking for the times/venue you are dragging across. This will then open the "Add Booking(s)" screen with the venue and times pre-filled in for you.

A number of fields will be present on the "Add Booking(s)" screen.

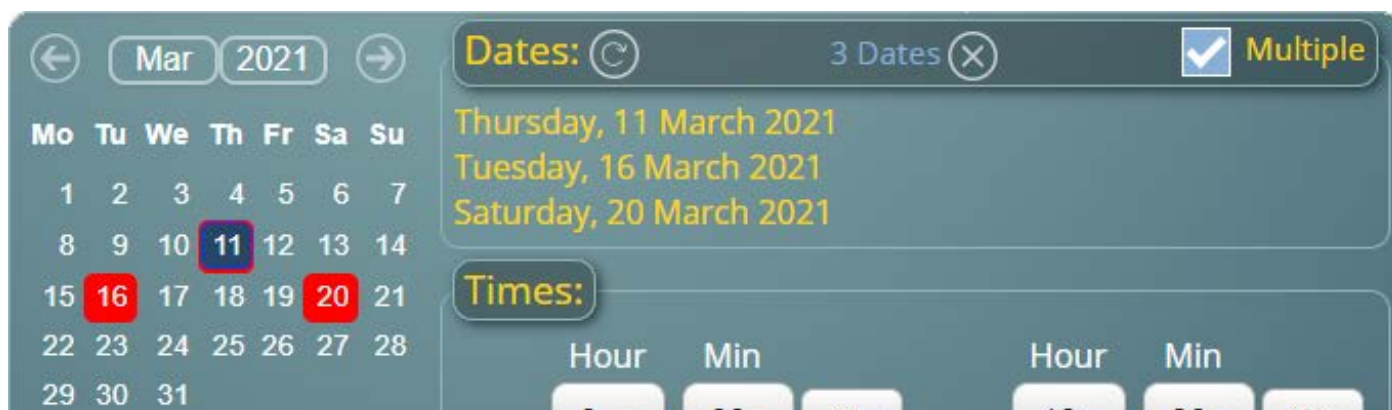
 The fields that are shown can be customized via the [Manage Fields](#) administrative settings




If the date you wish to add a booking for isn't already selected, use the calendar to navigate to the appropriate date, in the same manner as which you navigate around the main calendar.



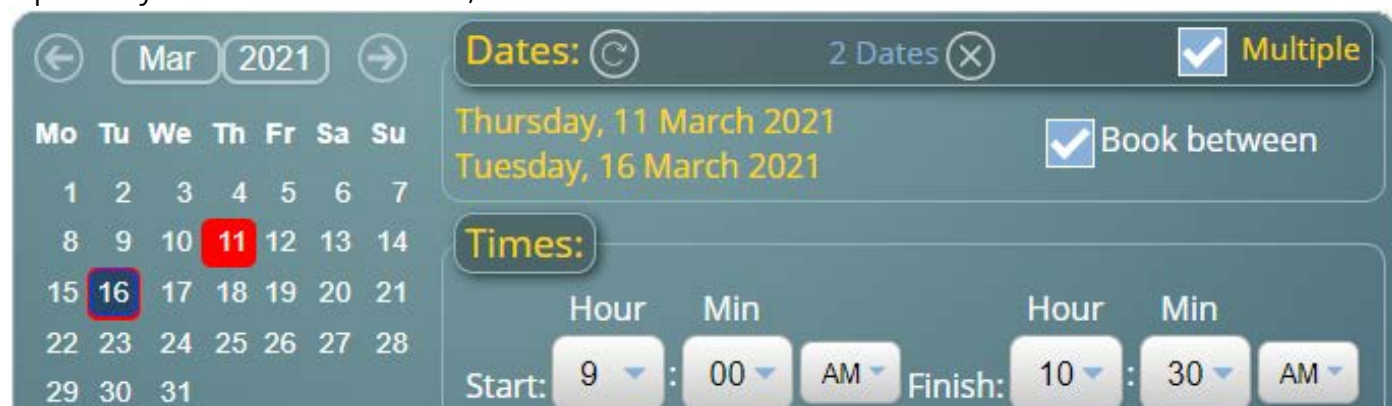
## Multiple Discrete Dates



You can select multiple dates to add the same booking to by ticking the "Multiple" box (located in the upper right corner of the dates list). Whenever the "Multiple" box is selected, each date you subsequently pick from the calendar will be added to the list of selected dates. Selecting an already selected date will remove it from the list. To remove all selected dates, use the  icon next to the indicator of the number of dates selected.

## Continuous Booking Across Dates

If precisely two dates are selected, an additional "Book Between" tick box is shown




If the "Book Between" box is selected, a continuous booking will be made commencing from the start time on the first selected date through to the finish time on the second selected date.

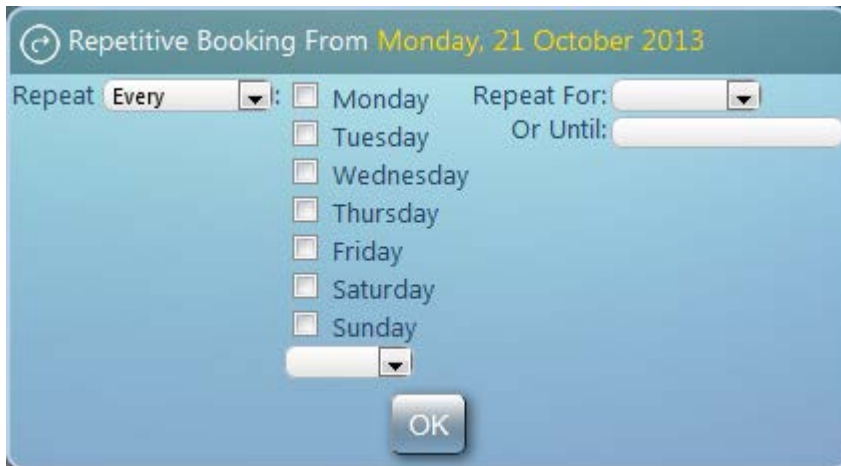


The "Book Between" option will not be shown to you if the standard Start/Finish time selector on your booking screen has been replaced with a Start/Duration selector or a Period list - See also [Manage Time Lists](#))

## Repetitive Bookings

As well as selecting multiple individual dates for your booking, you can swiftly add repetitive bookings via the  icon above the selected dates.

Clicking/tapping this icon allows you to quickly generate other dates that you'd also like to add your booking to.



On the Repetitive Booking window, you'll be presented with a "tick box" representing each day of the week as well as a "repeat" drop down containing a number of options.

You can also specify a duration (Repeat For), or specific end date (Or Until) to generate repetitive bookings until.

For example, if you select "every" from the repeat drop-down menu, tick the box for "Monday" and select repeat for "6 weeks", MIDAS will then automatically calculate and generate for you (from the currently selected date on the Add Bookings screen onwards) the dates of the next 6 Mondays.

As a further example, let's say you have a booking which takes place on the 2nd Thursday of every month. You'd select "On the 2nd" from the repeat drop down, tick the box for "Thursday", and select repeat for "6 Months". MIDAS will then automatically generate these 6 dates for you!

Once you've selected a date, multiple dates, or a date range, next one or more venues may be selected from the list of venues beneath the calendar.

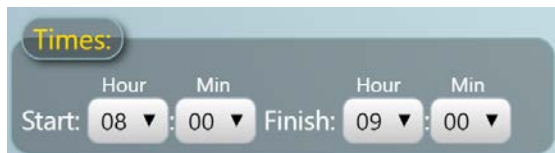
The date and venue fields will always be present on the "Add Booking(s)" screen as these are the minimum items of information that are needed to add a booking. Other common fields that may be present on your "Add Booking(s)" screen are as follows...



## Times

Depending upon your user permission, booking time selectors may appear in one of the following ways:

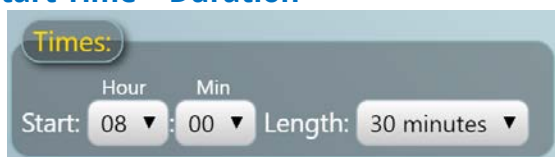
### Start Time + Finish Time



The interface shows a 'Times:' label. Below it, there are two sets of dropdown menus. The first set is labeled 'Start:' and has 'Hour' and 'Min' dropdowns with values '08' and '00' respectively. The second set is labeled 'Finish:' and has 'Hour' and 'Min' dropdowns with values '09' and '00' respectively.

Select a start and a finish time for your booking(s)

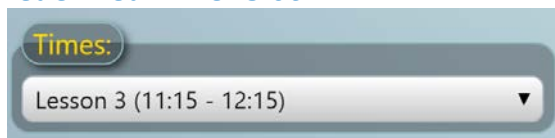
### Start Time + Duration



The interface shows a 'Times:' label. Below it, there are two dropdown menus for 'Hour' and 'Min' with values '08' and '00' respectively. To the right of these is a 'Length:' dropdown menu with the value '30 minutes'.

Select a start time and a length for your booking(s)

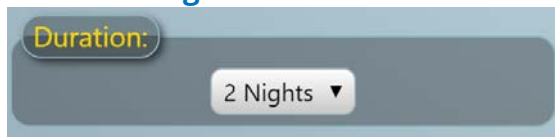
### Predefined Time "slot"



The interface shows a 'Times:' label. Below it is a single dropdown menu with the value 'Lesson 3 (11:15 - 12:15)'.


Select a time "slot" for your bookings


### Number of Nights



The interface shows a 'Duration:' label. Below it is a dropdown menu with the value '2 Nights'.


Select a duration (number of nights) for your bookings


 Tip: Duration and Time Slot lists can be predefined – even on a per-user basis! – See [Managing Time Lists](#)

 Tip: You can run MIDAS in either 12 or 24 hour clock mode – See [Date/Time Settings](#)

## Client

Next, you will need to specify the client who the booking is for. Begin typing the first few letters of the client's name in the Client field. As you type, a small drop down will appear showing you existing clients matching the characters you are typing. Selecting a client from this drop-down list will make the booking for that client. Alternatively, you can double-click the client field to perform a search for an existing client.

Once you select an existing client, an  icon will appear alongside the client field, allowing you to update the client's details (if required)

If, however, the client you wish to add the booking for doesn't already exist in MIDAS, you can use the  button alongside the client field to add details of your new client to the database.

➔ See Also: [Adding Clients](#) | [Modifying Clients](#)

## Attendees

Allows you to specify or estimate the number of people that are expected to attend the booking for each selected Venue. If the number of "Attendees" exceeds the maximum occupancy level (capacity) of a venue(s), MIDAS will prompt you to make another selection.

➔ See Also: [Setting Maximum Occupancy Levels](#) | [Managing Safety Settings](#)

## Booking Type

You can "categorize" your bookings by assigning a colored "booking type" from the drop-down list. This makes them easier to distinguish in the Booking Grid.

➔ See Also: [Managing Booking Types](#)


## Notes

There is also space to add notes or a description about the booking. It can be useful to give as much additional information here about the booking as possible, especially if other MIDAS users will see this booking.

## Resources

You can also add resources, including equipment, consumables, and staffing to each selected venue in your booking

➔ See Also: [Adding Resources to Bookings](#) | [Managing Resources](#)

 **Tip:** MIDAS can automatically notify specific users when certain resources are added to booking – See [Watches](#)

## Custom Booking Fields

Other custom booking fields may also be present on your Add Booking(s) screen

➔ See Also: [Custom Booking Fields](#)

Once you are happy with all the details of your booking(s), click/tap the "Check Availability and Book" button.


MIDAS will prompt you if it notices anything obviously wrong with the information you have entered thus far, otherwise MIDAS will proceed to check that the selected venue(s) are available on the selected date(s) and times. The results of which will be displayed on the Booking Availability screen.

## Booking Availability

The "Booking Availability" screen shows a summary of your proposed booking(s). This will include current venue and resource availability for your booking(s).



### The "Venue Availability" column will shown one of the following states:


<b>Available</b>	The venue/date/times you've specified are currently available for booking. When the "Book All Available" button is clicked, this booking will be added to the system
<b>Unavailable</b>	The booking would conflict with an existing booking, and so won't be added when the "Book All Available" button is clicked. Additionally, a small  icon will be shown which if hovered over with your mouse will show details of the existing conflicting booking, in the <a href="#">Booking Information Panel</a>
<b>Outside Operating Hours</b>	The specified times fall outside the venue's operating hours, and so this booking won't be added
<b>Blocked By X</b>	The booking you're attempting to make won't be added as another booking is taking place in the venue specified by X, and your administrator has prevented these two venues from being concurrently booked

The "Book all Available" button adds those bookings to MIDAS that are listed as being "Available", and then transfers you to the view the date of the booking. Bookings that are not "Available" will not be added. Also, only resources that are listed as "Available" will be added to the booking(s).

If none of the desired dates/times/venues are available, the "Book All Available" button will be disabled, and you should use the "Change Booking" button to go back to the previous screen and allows you to make any alterations, before checking booking availability again.

Depending upon how your MIDAS administrator has configured MIDAS, additional options may also be present on the Booking Availability screen. These may include:

## Booking Alternatives

In the event a proposed booking is shown as being "unavailable", you may also see an adjacent  icon. Clicking this icon will display a list of alternative available times and/or venues from which you can select instead.

## Send Booking Confirmation

If present and selected, an email booking confirmation will be sent to the client once the "Book All Available" button is clicked/tapped (This option will only be present if an email address exists for the client).

## Create Invoice


If present and selected, an invoice will automatically be created including all the bookings and resources listed as being "Available" once the "Book All Available" button is clicked/tapped.

# Adding Resources to Bookings

When adding/updating a booking, it's possible to assign "Resources" to each venue.

Resources can be added to a booking in the following way:


- Either [add a new booking](#), or [modify an existing booking](#).
- In the "Resources" section of booking details screen, select the venue to which you wish to assign resources, and click/tap the adjacent "Add Resources" button.
- A window will open showing a full list of existing resources, split across three (or more) categories, including; Equipment, Consumables, and Staffing.
- Use the tabs above the common resources list to switch between these categories.
- You can further filter the list of resources shown by typing into the "Search" field at the top of the window.
- To add resources, simply enter a desired quantity for each resource you wish to assign.
- Once you have added a quantity of each resource you require, click/tap the "OK" button to close the resource selector and return to the booking form, with your desired resources listed.
- If the booking includes more than one venue, repeat this process to assign resources to the other venues as necessary.

 See Also: [Managing Resources](#)

# Adding Setup and Breakdown Times

In addition to Start and Finish times for your bookings, you can also specify a "setup" period immediately before each booking, and/or a "breakdown" period immediately after each booking.

These fields may be enabled via MIDAS Admin Options → Manage MIDAS → Fields → Booking Fields → Setup / Breakdown Times.

Select the "Visible" box to make these fields visible. To change the names or default values of these setup and breakdown fields, or to select which users these fields are shown to, click/tap the adjacent  icon.


➔ See Also: [Manage Fields](#)


Additional settings are also available in MIDAS to control whether setup/breakdown periods can overlap other bookings, and how setup/breakdown periods should be invoiced.

➔ See Also: [Manage Booking Settings](#) | [Manage Invoice Settings](#)


## Modifying Bookings


### Quickly Rescheduling (moving) a Booking

- Click/tap the  icon
- In the Dynamic Grid Editing selector, select "Unlock Grid (Move)" and then "OK"
- "Drag" the booking to a new time slot and/or venue
- Once you've finished moving bookings, open the Dynamic Grid Editing selector again and choose "Disable (Lock Grid)" to prevent any further accidental moving of bookings


 Tip: Selecting the "Retain Start Time" option in the Dynamic Grid Editing selector will retain the start time of the booking(s) you're moving on whichever date/venue they are moved to

### Quickly Duplicating (copying) a Booking

- Click/tap the  icon
- In the Dynamic Grid Editing selector, select "Unlock Grid (Duplicate)" and then "OK"
- "Drag" the booking to the new time slot and/or venue you wish it to be copied to
- Once you've finished duplicating bookings, open the Dynamic Grid Editing selector again and choose "Disable (Lock Grid)" to prevent any further accidental duplication of bookings

 Tip: Selecting the "Retain Start Time" option in the Dynamic Grid Editing selector will retain the start time of the booking(s) you're duplicating on whichever date/venue they are copied to

### Modifying a single Booking

- Click/tap a booking block and select the "Modify Booking" icon  from the pop-up menu.

### Modifying multiple Bookings


- Click/tap a booking block and select the "Modify Similar Bookings" icon  from the pop-up menu.

- A window will open allowing you to specify the criteria that MIDAS should use to locate similar bookings to the one you've selected.
- MIDAS will then search for and list bookings that are similar to the booking you've selected.
- Select from this list the bookings you wish to modify and select "Modify Selected Bookings".


→ MIDAS Knowledge Base: [Why can't I modify/delete certain bookings?](#)

## Deleting Bookings

### Deleting a single Booking

- Click/tap a booking block and select the "Delete Booking" icon  from the pop-up menu.
- You'll then be prompted to confirm that you wish to delete the selected booking.
- If there's an email address associated with the booking's client, you'll also be offered the option to send a cancellation notification to the client along with an optional reason why you're cancelling/deleting their booking.

### Deleting multiple Bookings


- Click/tap a booking block and select the "Delete Similar Bookings" icon  from the pop-up menu.
- A window will open allowing you to specify the criteria that MIDAS should use to locate similar bookings to the one you've selected.
- MIDAS will then search for and list bookings that are similar to the booking you've selected.
- Select from this list the bookings you wish to delete.
- If there's an email address associated with the booking's client, you'll also be offered the option to send a cancellation notification to the client along with an optional reason why you're cancelling/deleting their booking.
- Click/tap "Delete Selected Bookings".

→ See Also: [Restoring Deleted Bookings](#)

→ MIDAS Knowledge Base: [Why can't I modify/delete certain bookings?](#)

## Tentative Bookings

A "Tentative" booking is one which will be automatically removed from the scheduling calendar if it has not been "confirmed" within a certain time frame.

 The Tentative Bookings feature may be enabled/disabled via MIDAS Admin Options → Manage MIDAS → Manage Booking Settings

When enabled, you can select which of your [Booking Types](#) should be designated as "tentative" booking types.

Tentative Bookings behave just the same as standard "confirmed" bookings for the duration of their life span. However, if a tentative booking has not been manually updated to become a confirmed booking (by [modifying the booking](#) and changing its Booking Type accordingly to a type with a confirmed status) within a definable time frame then MIDAS will automatically remove the tentative booking and free up the venue/time slot it previously occupied.

Tentative bookings are denoted by a  icon on the booking within the [booking grid](#).

➔ For more information on configuring tentative booking types and their expirations, see [Manage Booking Types](#)

## Booking Requests


The Booking Request functions allow non-MIDAS users (i.e. members of the public and/or visitors to your website) to check room availability and make "booking requests" for your rooms. Once enabled, simply link or direct people to [https://your\\_midas\\_url/request](https://your_midas_url/request) (where "your\_midas\_url" is the actual URL of your MIDAS) to allow them to start making booking requests!

"Booking Requests" are not actual bookings - they first require approval by a user with sufficient privileges (a venue "Manager") before they become "confirmed" bookings.

Additionally, an administrator can make any MIDAS user account a "request only" account. In such instances, the regular "Add Booking" screen the logged-in user would see instead becomes a "Make a Booking Request" screen. Like "public" Booking Requests, booking requests made by logged-in users also require approval before being converted into "confirmed" bookings.

➔ See Also: [Processing Booking Requests](#) | [Manage Public Settings](#)

## Processing Booking Requests

The "Pending Booking Requests"  icon in the toolbar allows you to view "Booking Requests" awaiting approval for the venues for which you are a "Manager".

➔ See Also: [Booking Requests](#) | [Manage Public Settings](#)

From the "Pending Booking Requests" screen you can action booking requests in the following ways:



## **Approve**

Accept the Booking Request, add it to MIDAS as a confirmed booking, and automatically notify the client via email that their request has been approved.

To automatically create an invoice when confirming the booking, ensure that the "Generate Invoices when approving requests" option at the bottom of the screen is selected (This option will only be present if you have sufficient invoicing [user permissions](#)).

## **Query**

Compose a new email to the client to request more information/query their booking request, etc.

## **Modify**

Allows you to make modifications to the original Booking Request, before it is added to MIDAS as a confirmed booking - for example the client may have requested "Room 1", you may wish to move them into "Room 2" instead. Once the modified request has been added to MIDAS, the client is automatically notified via email that a modified version of their original request has been approved, and the revised details are also included in the email.

## **Reject**

Reject the selected Booking Request, and remove it from MIDAS. You will be prompted to give a reason why you are rejecting the request, which will be sent to the client via email.

## / **Lock / Unlock**

Click/tap this icon to "lock" a Booking Request to you. When a request is "locked", no MIDAS user other than yourself may perform any action upon the request. This is useful if you have multiple MIDAS users with access to the Pending Booking Request screen, and you're in the process of querying a request with a client - you don't want another user to approve/reject it if you're currently dealing with the request yourself!

## Bulk Approve / Bulk Reject Booking Requests

The "Bulk Reject" button, when clicked, will reject all outstanding booking requests currently in your queue. You will also be prompted to give a reason why you are rejecting all requests, which will be sent via email to each client with a booking request being rejected.

The "Bulk Approve" button, when clicked, will attempt to approve all currently outstanding booking requests. Requests which conflict with existing bookings, fall outside operating hours, or conflict with another request that has just been approved as part of the "Bulk Approve" process will not be approved.

Because the order in which booking requests are approved may affect the availability of other booking requests, you can configure the order in which MIDAS will attempt to approve booking



requests when the "Bulk Approve" button is clicked. You'll find this setting via MIDAS Admin Options → Manage MIDAS → Web Requests → Bulk Approval Order.

➔ See Also: [Manage Public Settings](#)

## Settings

At the bottom of your Pending Booking Request screen, you'll find a number of options...

Tick the "Notify me by email when new requests are received" option to receive automated email notification whenever new booking requests for a venue you manage are received. If the "Only if I'm not logged in" option is additionally selected, you'll only be sent these notifications when you're not logged in.

Tick the "Approve/Reject silently" option prior to processing a booking request to do so "silently" (with no email notification sent to the original requester that their request has been approved/rejected).

**i** Note: To prevent the "Approve/Reject silently" option from being inadvertently left selected, the setting will not be saved when you navigate away from the Pending Booking Requests screen, and will default to "off" upon each visit

Tick the "Generate Invoices when approving requests" box to have MIDAS automatically generate an invoice whenever you approve a booking request.

## Troubleshooting

➔ MIDAS Knowledge Base: [Why is my pending bookings screen empty, and I'm not receiving notifications of new requests?](#)

➔ MIDAS Knowledge Base: [I was notified of booking requests requiring approval, but when I log in I see none?](#)

## Public Web Bookings

Similar to the Public Booking Request feature of MIDAS (allowing non-users to check availability and submit booking "requests" online), the Public Web Booking feature makes "confirmed" bookings (rather than booking "requests"), and includes an additional payment step allowing the individual to pay in order to instantly confirm their booking.

Once enabled, Public Web Bookings may be made via [https://your\\_midas\\_url/book](https://your_midas_url/book) (where "your\_midas\_url" is the actual URL of your MIDAS system)

In order to accept Web Bookings, you must first enable PayPal or Stripe integration (MIDAS Admin Options → Manage MIDAS → Invoicing → Online Payments).



**IMPORTANT:** If you enable the PayPal option it is **essential** that you correctly configure [PayPal IPN \(Instant Payment Notifications\)](#). Failure to do so will result in Web Bookings paid for via PayPal being lost






See Also: [Booking Requests](#) | [Manage Public Settings](#) | [Configuring PayPal Integration](#)

## Clients

### Adding Clients



New Clients can be added to MIDAS in either of the following ways:


1. When adding a new booking, clicking/tapping the  icon alongside the "Client" field on the "Add Booking(s)" screen will pop open a new window allowing you to enter details for a new client. Once details have been entered select the "Add New Client" button at the bottom of this window to save the client. The window will close, and the client's name and organization will then be shown on the booking form, allowing you to make a booking for the new client.
2. By searching for a client via the  icon in the main toolbar. If the client you search for cannot be found in the database, an  icon will be displayed, which when selected will allow you to enter details for a new client and add them to the database.

When adding a new client, the following fields are available by default:

Field	Description
Client	The client's name
Organization	The organization/company the client belongs to
Address	The client or organization's postal/mailling address
Phone	The client or organization's telephone number
Cell	The client's mobile/cellular phone number
Fax	The client or organization's fax number
Email	The client's email address. Multiple email addresses may be added for a client by entering each address on a separate line





	 <b>Tip:</b> If you wish to be able to send booking confirmations, email invoices, or contact clients via email directly from within MIDAS, a valid email address must be specified for your clients
Email Reminders	The "e-mail Reminders" setting can be used in conjunction with <a href="#">Scheduled Tasks</a> to automatically send the client reminders of their upcoming bookings and/or unpaid invoices
Current Credit	This field allows you to maintain a line of "credit" for the client. This amount will then automatically be deducted from subsequent invoices for the client, until the Current Credit reaches zero
Tax Exempt	This option, if enabled, will exclude tax from being charged on invoices for the client
Invoice To	By default, bookings for this client will also be invoiced to this client. Use the "Invoice To" option if you wish invoices for this client's bookings to instead go to a different client. This is useful in instances where the client whom a booking is for differs from the person/organization to be invoiced for their booking
Default Booking Type	When selecting a client on the Add/Modify Bookings screen, you may also separately select a booking type. The "Default Booking Type" setting however allows you to have a certain booking type "pre-selected" whenever this client is chosen  A user may still go on to manually change a selected booking type on their Add/Modify Bookings screen (unless you also <a href="#">hide the Booking Type field</a> from them)
Client Notes	An area to record additional information or internal notes relating to this client

 **Tip:** You can also add your own [custom client fields](#)

## Modifying Clients

To modify an existing client's details, you will firstly need to locate the client in the database.



To find the client, use the search function by selecting the  icon in the main toolbar. Enter part of the client's name into the search field (ensuring the "Clients" search option is selected so that MIDAS knows what to search for).

Locate the client in the list of search results, and click/tap that entry's corresponding  icon.

You can then view and modify all the details on file for that client.

When modifying a client, the following fields are available:


Field	Description
Client	The client's name
Organization	The organization/company the client belongs to
Address	The client or organization's postal/mailling address
Phone	The client or organization's telephone number
Cell	The client's mobile/cellular phone number
Fax	The client or organization's fax number


Email	<p>The client's email address. Multiple email addresses may be added for a client by entering each address on a separate line</p> <p> <b>Tip:</b> If you wish to be able to send booking confirmations, email invoices, or contact clients via email directly from within MIDAS, a valid email address must be specified for your clients</p>
Email Reminders	The "e-mail Reminders" setting can be used in conjunction with <a href="#">Scheduled Tasks</a> to automatically send the client reminders of their upcoming bookings and/or unpaid invoices
Current Credit	This field allows you to maintain a line of "credit" for the client. This amount will then automatically be deducted from subsequent invoices for the client, until the Current Credit reaches zero
Tax Exempt	This option, if enabled, will exclude tax from being charged on invoices for the client
Invoice To	By default, bookings for this client will also be invoiced to this client. Use the "Invoice To" option if you wish invoices for this client's bookings to instead go to a different client. This is useful in instances where the client whom a booking is for differs from the person/organization to be invoiced for their booking
Default Booking Type	<p>When selecting a client on the Add/Modify Bookings screen, you may also separately select a booking type. The "Default Booking Type" setting however allows you to have a certain booking type "pre-selected" whenever this client is chosen</p> <p> A user may still go on to manually change a selected booking type on their Add/Modify Bookings screen (unless you also <a href="#">hide the Booking Type field</a> from them)</p>
Client Notes	An area to record additional information or internal notes relating to this client


Once you've finished updating the client's details, select the "Modify Client" button to save changes.

## Deleting Clients

To delete a client from MIDAS, firstly locate the client in the database.


To find the client, use the search function by selecting the  icon in the main toolbar. Enter part of the client's name into the search field (ensuring the "Clients" tick box is selected so that MIDAS knows what to search for).


Locate the client in the list of search results, and click/tap that entry's corresponding  icon. You will be prompted for confirmation that you wish to remove the selected client from the database.


 **Warning:** Removing a client from MIDAS will also remove any bookings that have been made for that client

## Emailing Clients


MIDAS provides the ability to email your clients directly from within the software at any time!


Firstly, you will need to locate the client you wish to email, via the search icon  in the main toolbar. Enter part of the client's name into the search field (ensuring the "Clients" search option is selected so that MIDAS knows what to search for).

Locate the client in the list of search results, and if an email address exists for the client, a corresponding  icon will be displayed.

Selecting the  icon will allow you to compose an email to the client.

Once you have composed your email, click/tap "Send" to send your email.

 **Tip:** Tick the "BCC to me" box before selecting "Send" to have a copy of the email also sent to your email address for your records

 See Also: [Managing Email Settings](#)

## Invoicing

 See Also: [Managing Invoice Settings](#)

## Creating Invoices


Invoices can be created in a number of ways:

### Generate an invoice at time of booking

Depending upon how your MIDAS administrator has configured MIDAS, invoices may be automatically created for every booking made, with no user interaction required on your part.

Alternatively, when adding a new booking you may be presented with a "Create Invoice" option on the "Booking Availability" screen. Make sure this box is ticked before selecting "Book All Available" to automatically create an invoice for your booking. This invoice will include all the bookings shown on the Booking Availability screen that are "Available", and any "Available" resources that have been assigned to the booking as well.

## Generate an invoice for an existing booking



When clicking/tapping a booking in the Booking Grid, the following icon may be offered to you: 

Selecting this icon will automatically generate an invoice for this booking, including any resources that have been assigned to it.

This icon will only be available if you have sufficient user privileges and no invoice has previously been created for the selected booking.

## Generate an invoice for a client's bookings over a date range

You can generate a single invoice for all client's bookings over a specific date range as follows:

- Select the  icon in the main toolbar.
- In the top right corner of the Invoicing screen, click/tap the  icon.
- You will then be prompted for a client to generate an invoice for, and a date range of bookings for that client to include in the invoice.
- By default, bookings for all venues and booking types will be included on the generated invoice, however, you'll also see options to be able to limit the inclusion of bookings by these criteria.
- An Advanced Filter is also available, allowing you to include/exclude bookings from the generated invoice which match a particular criterion. You'll be able to select a booking field (including any [custom booking fields](#) you've defined) from a drop-down list, select a match type, and enter a match string.


Match types available include:

- **Equals** – Will include bookings where the selected booking field's value exactly matches the string you enter
- **Does Not Equal** – Will include bookings where the selected booking field's value doesn't exactly match the string you enter
- **Contains** – Will include bookings where the selected booking field's value contains an occurrence of the string you enter
- **Does Not Contain** – Will include bookings where the selected booking field's value contains no occurrences of the string you enter
- **Begins With** – Will include bookings where the selected booking field's value begins with the string you enter
- **Ends With** – Will include bookings where the selected booking field's value ends with the string you enter
- **Is Greater Than** – Will include bookings where the selected booking field's numeric value is higher than the value you enter
- **Is Less Than** – Will include bookings where the selected booking field's numeric value is higher than the value you enter


For example, you could generate an invoice which only includes booking where there are more than 10 people attending, or generate an invoice which excludes any bookings that have the phrase "exclude from invoicing" in their booking notes, etc.


A "Case Sensitive" match option is also available allowing you to optionally make string matches case sensitive.


- Select "Generate" to generate the invoice.


 Only bookings for which no invoice has been previous generated will be included when generating invoices in this way

## Manually create an invoice



You can create invoices for your clients via the  icon in the main toolbar.

- On the invoicing screen, click/tap the "Create"  icon.
- From the template options presented, select the type of invoice you wish to create (Regular, Deposit, or Cancellation).
- A blank invoice will then be displayed allowing you to create your invoice.
- Start by entering the client you wish to invoice in the "Invoice To" field.
- Next, you can add the items you wish to invoice the client for.
- For each item, enter a brief description, quantity, unit rate, and tax rate.
- Line amounts and invoice totals will be automatically calculated.

 Tip: Selecting the last blank line of the invoice will add a new line to the invoice, allowing you to add further items


 Tip: Clicking/tapping the "Amount" column header will toggle the display of calculated line amounts inclusive or exclusive of tax

- Once you are happy with your invoice, select the "Save Invoice" button.

 Note: Invoices, however created, are not automatically sent to clients by default. They can be actioned (printed or emailed) via the  icon in the main toolbar



## Modifying Invoices


Once an invoice has been created, before it has been printed or emailed, you can modify it.


 **Warning:** Once an invoice has been printed or emailed, MIDAS assumes it has been "finalized" and sent to the client. Therefore, no further editing of the invoice, other than updating its payment status, will be allowed


 See Also: [Updating Invoice Status](#)

### Modifying an invoice

- First, select the  icon in the main toolbar.
- On the invoicing screen, use the "Jump to Invoice No" function to locate your invoice, or;
- Use the "Show Invoices" drop down to select "Invoices not actioned". When the results are displayed, locate the invoice you wish to modify.
- Finally, select the invoice's corresponding  icon.
- The invoice will then be displayed in an editable form, allowing you to make changes.

 **Tip:** Selecting the last blank line of the invoice will add a new line to the invoice, allowing you to add further items

 **Tip:** Clicking/tapping the "Amount" column header will toggle the display of calculated line amounts inclusive or exclusive of tax





 **Note:** Invoices are not automatically sent to clients by default. They can be actioned (printed or emailed) via the Invoicing icon in the main toolbar



## Updating Invoice Status

Once an invoice has been printed or emailed, it can no longer be modified (as after printing or emailing, MIDAS assumes that the invoice has been "finalized"). Once an invoice has been "finalized", you can however still update its status as payments are received. You'll also be able to add visible notes to the invoice too.

To update the status of an invoice:

- Locate the invoice you wish to update the payment status of, either by;
  - Select the  icon in the main toolbar.
  - On the invoicing screen, use the "Show Invoices" drop down to select "Invoices outstanding".
  - When the results are displayed, locate the invoice you wish to update the status of, and click/tap its corresponding  icon.
- Or;
  - Enter the invoice number in the "Jump to Invoice" box and click/tap the  icon
  - When the invoice is displayed, click the  icon in the invoice toolbar.
- The invoice will then be displayed with an editable field entitled "PAID".
- Enter the amount the client has so far paid against this invoice into the PAID field.
- You may optionally add a visible note to the invoice.
- Click/tap the "Update Status" button.

If you enter an amount in the PAID field that's less than the amount outstanding on the invoice, MIDAS will offer a "Mark outstanding amount as credit?" option. If selected, when updating the invoice's status any outstanding amount will be shown as a credit on the invoice, reducing the outstanding balance to zero.

For example, if an invoice total is \$200, you enter \$180 in the PAID field and select the "Mark outstanding amount as credit?" option, then the invoice will be updated to show that \$180 has been paid against the invoice, and the remaining balance (\$20) has been added as a credit.

This feature effectively allows you to mark invoices as "complete" even if the client has underpaid.

If you instead enter an amount in the PAID field that's more than the amount outstanding on the invoice, MIDAS will offer an "Apply over payment as client credit?" option. If this option is selected when updating the invoice's status, the over payment amount will be added as a credit on the client's record in the database. Any credit associated with a client record is then automatically deducted from their next invoice.

For example, if an invoice total is \$200, you enter \$220 in the PAID field and select the "Apply over payment as client credit?" option, then the invoice will be updated to show that \$220 has been paid



against the invoice, and \$20 will be recorded as a client credit. The next invoice for that client will automatically have a \$20 credit applied to it.


## Adding Internal Invoice Notes

You can add internal notes/comments to invoices within MIDAS, which will only be visible to MIDAS users who are able to view the invoice.

Internal notes do not appear on invoices themselves, and so are not visible to the client a given invoice is for.

To add/update internal notes for an invoice:

- Select the  icon in the main toolbar.
- Locate and view the invoice you wish to add/update internal notes for.
- When viewing the invoice click the "Internal Notes"  icon from the Invoicing toolbar shown above the invoice.
- An "Internal Notes" editor will then be shown, allowing you to add/update internal notes currently associated with the selected invoice.
- Once finished, click the "Internal Invoice Notes" icon from the Invoicing toolbar again to hide the editor and save the internal invoice notes.

 **Tip:** If you've enabled [online payments](#) for your invoices, then when your client pays it will also be noted in the Internal Notes for their invoice (in addition to being recorded in the [Invoice History log](#))

## Viewing Invoice History



Whenever a user views an invoice on screen, the most recent action or activity performed on the invoice is shown directly above the invoice.


This will indicate the date & time of the most recent activity, the type of activity (i.e. created, modified, printed, emailed, etc), and the user who initiated the action.

You can also view the complete history log for all activity & actions relating to the currently selected invoice by simply clicking on this most recent activity status along the top of the invoice when displayed on screen.

## Deleting Invoices

To permanently remove an invoice from MIDAS:

- Select the  icon in the main toolbar.
- On the invoicing screen, use the "Jump to Invoice" function to locate a specific invoice, or use the "Show Invoices" drop down to filter invoices held in MIDAS and locate your invoice from the results.
- Finally, click/tap the invoice's corresponding  icon.
- After being prompted for confirmation, the selected invoice will be deleted.



 **Warning:** Once an invoice has been deleted, it is removed from the system, and can only be retrieved by restoring the database to an earlier point in time. See [Manage Database Settings](#)

## Cloning Invoices


The "Clone Invoice" feature of MIDAS is a quick and convenient way to copy the contents of an existing invoice across to a new invoice.

This can be extremely useful especially if you regularly manually create similar invoices.

To "clone" an invoice (copy the contents of an existing invoice across to a new invoice):

- Select the  icon in the main toolbar.
- On the invoicing screen, use the "Jump to Invoice" function to locate a specific invoice, or use the "Show Invoices" drop down to filter invoices held in MIDAS and locate your invoice from the results.
- Click/tap the invoice's corresponding  icon.
- After being prompted for confirmation, the contents of the current invoice will be copied across to a new invoice.



The newly cloned invoice will have a different invoice number, no invoice date assigned (allowing you to freely modify its contents), and no amount paid against it.

 **Info:** "Cloned" invoices do not maintain links with any bookings which may have appeared on the original invoice

## Merging Invoices


The "Merge Invoice" feature of MIDAS allows merging the contents of two unsent invoices for the same client into a single invoice.


To "merge" an invoice into another invoice:


- Select the  icon in the main toolbar.
- On the invoicing screen, use the "Jump to Invoice" function to locate the specific unsent invoice you wish to merge into another, or use the "Show Invoices" drop down to filter invoices held in MIDAS and locate this invoice from the results.
- Click/tap the invoice's corresponding  icon. (Note: This icon is only shown on unsent invoices for clients with at least one other unsent invoice)
- You'll then be presented with a list of other unsent invoices for the client, from which you can select a target invoice for the current invoice to be merged into.
- Click "Merge Invoice" to merge the invoice currently being viewed into the selected invoice.


Following a successful merge, items from the original invoice will be appended to the target invoice, and totals updated accordingly. The original invoice will then be removed from the system.


## Printing Invoices


An invoice may be printed at any time, by selecting the  icon in the main toolbar.

- On the resulting invoicing screen, use the "Jump to Invoice" function to locate a specific invoice, or use the "Show Invoices" drop down to filter invoices held in MIDAS and locate an invoice from the results.
- Click/tap the invoice's corresponding  icon to print out the invoice.


 Note: Once an invoice has been printed, MIDAS assumes it has been "finalized" and the invoice becomes "locked". Therefore, no further editing of the invoice, other than updating its payment status, will be allowed


 See Also: [Updating Invoice Status](#)


 See Also: [Customizing the Invoice Template](#)


 MIDAS Knowledge Base: [How to save invoices as PDF files](#)


## Emailing Invoices

An invoice may be emailed to the client at any time, by selecting the  icon in the main toolbar.

- On the resulting invoicing screen, use the "Jump to Invoice" function to locate a specific invoice, or use the "Show Invoices" drop down to filter invoices held in MIDAS and locate an invoice from the results.
- Click/tap the invoice's corresponding  icon to send the invoice to the client via email.

 **Note:** Once an invoice has been printed, MIDAS assumes it has been "finalized" and the invoice becomes "locked". Therefore, no further editing of the invoice, other than updating its payment status, will be allowed



 See Also: [Updating Invoice Status](#)


 See Also: [Customizing the Invoice Template](#)

## Refunding Invoices

The "Refund Invoice" feature of MIDAS allows you to mark a paid invoice as refunded either in whole or in part.



To apply a refund to an invoice:


- Select the  icon in the main toolbar.
- On the invoicing screen, use the "Jump to Invoice" function to locate the invoice you wish to mark as refunded, or use the "Show Invoices" drop down to filter invoices held in MIDAS and locate this invoice from the results.
- Click/tap the invoice's corresponding  icon. (Note: This icon is only shown on invoices for which a payment has previously been recorded)
- You'll then be prompted to enter the amount to mark as a refund against the selected invoice. This will default to the full amount that has already been paid against the invoice.
- Selecting the "Apply refund as client credit?" option will add the amount you're applying as a refund as a client credit in MIDAS. Any client credit is automatically deducted from the client's next invoice.
- Selecting the "Raise Credit Note?" option will also create a [credit note](#) for the refunded amount.
- Click "Apply Refund" to merge the invoice currently being viewed into the selected invoice.


 It's important to note that refunding an invoice either in whole or in part won't actually refund/reverse any monetary transaction your client has already made. The ability to refund in MIDAS is purely for your record keeping. Physical refunds would still need to be manually processed where applicable.

## Printing Receipts

Once part/full payment has been made against an invoice, a receipt may be printed for the client. In the event of a part-paid invoice, the client's receipt will also indicate the remaining amount still outstanding.



- Click/tap the  icon in the main toolbar.
- On the resulting invoicing screen, use the "Jump to Invoice" function to locate a specific invoice, or use the "Show Invoices" drop down to filter invoices held in MIDAS and locate an invoice from the results.
- Click/tap the invoice's corresponding  icon.
- If a payment has been made against the invoice, you'll be offered the choice to print either the invoice or a receipt.
- Select "Print Receipt" to print a receipt.

 See Also: [Customizing the Receipt Template](#)

 MIDAS Knowledge Base: [How to save receipts as PDF files](#)

## Emailing Receipts

Once part/full payment has been made against an invoice, a receipt may be emailed to the client. In the event of a part-paid invoice, the client's receipt will also indicate the remaining amount still outstanding.

- Click/tap the  icon in the main toolbar.
- On the resulting invoicing screen, use the "Jump to Invoice" function to locate a specific invoice, or use the "Show Invoices" drop down to filter invoices held in MIDAS and locate an invoice from the results.
- Click/tap the invoice's corresponding  icon.
- If a payment has been made against the invoice, you'll be offered the choice to email either the invoice or a receipt.

- Select "Email Receipt" to email a receipt to the client.

➔ See Also: [Customizing the Receipt Template](#)



## Online Payments

### PayPal stripe

If you have a PayPal or Stripe account, you can setup MIDAS to allow your clients to pay your invoices online.

➔ [Get a PayPal Account](#) | [Get a Stripe Account](#)

#### Setup payment of invoices through **PayPal** | Setup payment of invoices through **stripe**

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• Select the  toolbar icon</li> <li>• Select "Manage MIDAS"</li> <li>• Select the "Invoicing" tab</li> <li>• In the "Online Payments" section, click the tick box adjacent to the PayPal logo to enable payments via PayPal</li> <li>• Enter the email address associated with your PayPal account. This is the account where you receive PayPal payments</li> <li>• Click/tap "Save Changes"</li> </ul> | <ul style="list-style-type: none"> <li>• Select the  toolbar icon</li> <li>• Select "Manage MIDAS"</li> <li>• Select the "Invoicing" tab</li> <li>• In the "Online Payments" section, click the tick box adjacent to the "Powered By Stripe" logo to enable payments via Stripe</li> <li>• Enter your Stripe "Secret" and "Publishable" keys. Find out how to obtain these in our "<a href="#">Configuring Stripe Integration</a>" Knowledge Base article</li> <li>• Click/tap "Save Changes"</li> </ul> |
|---|--|


### How your clients can pay their invoices online


Once you have configured PayPal and/or Stripe as outlined above, your clients can then pay online the invoices you send them from MIDAS.


In order to pay an invoice online, clients will need to do the following:

- Open their browser, and navigate to [https://your\\_midas\\_url/pay](https://your_midas_url/pay) (Where "your\_midas\_url" is the URL of your MIDAS system)
- Enter their Invoice Number, For example, **MIDAS1234**
- Enter the date shown on their Invoice
- If you've enabled additional security (See also [Manage Invoice Settings](#)), the client may also be required to enter their email address
- If you've configured both PayPal and Stripe payment options, the client will be offered a choice between the two
- Click/tap "Pay Invoice"
- MIDAS will then retrieve and display their invoice, and the total amount due

- The client then clicks "Pay Invoice" and is then transferred to a secure PayPal payment page (in the case of the PayPal option), or presented with credit card input fields (in the case of the Stripe option), allowing the client to pay their invoice

 **Note:** A client can only pay an invoice once it has been actioned (printed, emailed, etc) within MIDAS. Until it has been either printed or emailed to a client, MIDAS assumes that the invoice has not yet been sent

 **Note:** Stripe will only be available as a payment method to your clients if enabled and provided your online payment screen ([https://your\\_midas\\_url/pay](https://your_midas_url/pay)) is served over an https connection

 **Tip:** You can configure your PayPal account to automatically notify MIDAS once an invoice has been paid, allowing MIDAS to automatically update the invoice's payment status accordingly. Please see: [Configuring PayPal Integration](#)  
(In the case of payment by Stripe, no further configuration is required, as MIDAS will automatically update invoices upon successful payment)

 **See Also:** [Managing Invoice Settings](#)

## Credit Notes


Credit Notes can be created in a number of ways:


### Raise a Credit Note when Refunding an Invoice

Please refer to the documentation on Refunding Invoices.


### Manually Create a Credit Note

You can create Credit Notes for your clients via the  icon in the main toolbar.

- On the invoicing screen, click/tap the "Create"  icon.
- From the template options presented, select "Credit Note".
- A blank credit note will then be displayed.
- Start by entering the client you wish to create the Credit Note for in the "Credit For" field.
- Next, you can add the items you wish to appear on the credit note.
- For each item, enter a brief description, quantity, unit rate, and tax rate.
- Line credit amounts and credit totals will be automatically calculated.

 **Tip:** Selecting the last blank line of the credit note will add a new line to the credit note, allowing you to add further items





 **Tip:** Clicking/tapping the "Amount" column header will toggle the display of calculated line credit amounts inclusive or exclusive of tax

- If you also wish to add the total credit amount on the Credit Note as an additional credit to the client's account in MIDAS (which will be automatically deducted from their next invoice), select the "Apply credit to client's account?" option.
- Once you are happy with your credit note, select the "Save Credit Note" button.

## Modifying a Credit Note


Once a Credit Note has been saved, its contents cannot be changed. However, visible notes appearing on the credit note (as well as internal notes) may be updated at any time.

To add visible notes to a Credit Note, locate the Credit Note, then click the  icon.

To add internal notes to a Credit Note, locate the Credit Note, then click the  icon.


## Deleting a Credit Note

Credit Notes may be removed from the system the same way that Invoices are.

To delete a Credit Note, first locate the Credit Note, then click the  icon.

## Printing a Credit Note

Credit Notes may be printed in the same way that Invoices are.

To print a Credit Note, first locate the Credit Note, then click the  icon.

## Emailing a Credit Note

Credit Notes may be emailed to clients in the same way that Invoices are.


To email a Credit Note, first locate the Credit Note, then click the  icon.

## Printing


➔ See Also: [Managing Print Settings](#)

## Printing Daily Bookings

### Basic Printing

Clicking/tapping the "Print"  icon in the toolbar will print out the bookings for the currently viewed date, or date range.

### Advanced Printing


Right-clicking (or long-clicking) the "Print"  icon will present you with a number of additional options to further customize your printout. You can choose a specific date (or a date range) to print bookings for, narrow down the print out to a set time period, as well as select which venues and/or booking types should be included in the print out and the print layout itself.


An Advanced Filter is also available, allowing you to include/exclude bookings from the generated print out that match a particular criterion. You'll be able to select a booking field (including any [custom booking fields](#) you've defined) from a drop-down list, select a match type, and enter a match string.



Match types available include:

- **Equals** – Will include bookings where the selected booking field's value exactly matches the string you enter
- **Does Not Equal** – Will include bookings where the selected booking field's value doesn't exactly match the string you enter
- **Contains** – Will include bookings where the selected booking field's value contains an occurrence of the string you enter
- **Does Not Contain** – Will include bookings where the selected booking field's value contains no occurrences of the string you enter
- **Begins With** – Will include bookings where the selected booking field's value begins with the string you enter
- **Ends With** – Will include bookings where the selected booking field's value ends with the string you enter
- **Is Greater Than** – Will include bookings where the selected booking field's numeric value is higher than the value you enter
- **Is Less Than** – Will include bookings where the selected booking field's numeric value is higher than the value you enter

For example, you could generate a printout which only includes booking where there are more than 10 people attending, or generate a printout which excludes any bookings that have the phrase "exclude from printing" in their booking notes, etc. A "Case Sensitive" match option is also available allowing you to optionally make string matches case sensitive.


 Tip: If printing bookings in a "table" layout across a date range, the "Split Dates" option can be used to force a new printed page for each date. Left unticked, bookings over the date range will be combined into a continuous printout


 Tip: If selecting the "Colorize printouts by Booking Type" option, please ensure that your browser is configured to print background colors/images/graphics. This setting is usually found within your browser's own print dialog

 Tip: You can also print out a monthly overview of your bookings by switching to the "Month View" screen () and clicking/tapping the Print icon

## Printing Bookings For A Client


To print bookings for a particular client, you will firstly need to locate the client in the database.

To find the client, use the search function by selecting the  icon in the main toolbar. Enter part of the client's name into the search field (ensuring the "Clients" search option is selected so that MIDAS knows what to search for).

Locate the client in the list of search results, and click/tap that entry's corresponding  icon.

You will then be offered a choice to print that client's previous bookings, their future bookings, or their bookings across a date range.

## Emergency Evacuation Data

If your MIDAS administrator has granted you sufficient privileges you may see this icon in the main toolbar , which may also include a number.

This is a one-click emergency printout button, which will generate a printout of all ongoing bookings at the point in time when the button is clicked/tapped. This feature is very useful if you need to conduct

an emergency evacuation/roll call of your premises, as it will instantly show you, or the Emergency Services, the location and estimated number of occupants across your site.

If the icon additionally includes a number this is a live estimate of the number of people on your site at the present time.




**DISCLAIMER:** We do not advocate putting yourself or others at risk in a building being evacuated by staying behind in order to print off data from MIDAS. You should **ONLY** use the "Emergency Evacuation Data" button if you are not putting yourself or others at increased risk



See Also: [Managing Safety Settings](#)

# Searching

MIDAS provides a set of powerful search functions, accessible via the  icon in the main toolbar.

## Locating Clients

Enter a keyword or phrase to search for, ensure the "Clients" search option is selected. Hit "Enter", or click/tap the search button and MIDAS will search for client records matching your search terms. Searching will include all client data, not just client and organization names, but also addresses, phone, fax, email address records.

## Locating Bookings

Enter a keyword or phrase to search for, ensure the "Bookings" search option is selected, and select from the following options to search for matching bookings in MIDAS:

### My Bookings

Restrict your search to only those bookings added to MIDAS by yourself (bookings added by other users will be ignored)

### All Bookings

Search bookings added to MIDAS by anyone

### Added

Search only bookings that were added to MIDAS during the date range specified

### Modified

Search only bookings that have been modified during the date range specified

## Added or Modified


Search bookings that were added or modified during the date range specified


## Taking Place

Search bookings actually taking place during the date range specified

## Limit To

Restrict search results to a particular booking type, or "All Booking Types"


 **Note:** Searching for bookings will search in all booking fields that have been configured to appear in the search results

 **Tip:** Search terms are not case sensitive


 **See Also:** [Managing Booking Fields](#)


# Statistics

MIDAS can automatically generate a range of graphical statistics and reports on-demand to enable you to analyze and monitor your bookings and facility usage.


These statistical reports can be accessed via the  icon in the main toolbar.

From this screen, you'll be able to generate reports into your Bookings, Clients, Invoices, Resources, Venues, Users, and MIDAS system.

Subsequently displayed statistics screens may be printed using the  icon in the main toolbar.

When viewing a report, a  button may be present in the top-right corner of the window.

Clicking/tapping this button will show additional report filters for the currently viewed report.

When viewing a report, a  button may also be present (depending upon your [user privileges](#)) allowing report data to be exported to Excel (2007+).

The following sets of statistics and reports are available:



### Bookings

Displays statistics over a selectable date range for bookings taking place, added, and modified. These statistics can be further filtered by Booking Type.

### Clients

Displays statistics including; Total clients/organizations in MIDAS, Newest client, Top 10 clients, and Organization popularity. Individual client statistics can also be viewed indicating dates the client was added, when their previous, next, first and last bookings are, the total and average length of their bookings, and the number of invoices for the client.

### Invoices

Displays a breakdown of clients, organizations, or booking types invoiced between a selected date range. Statistics also show percentage breakdowns of the total amount invoiced during the selected period, as well as breakdowns of the amount of income received and still outstanding. The Un-Invoiced Bookings report indicates the number of bookings for clients, organizations, or booking types during the selected date range for which invoices haven't yet been created.

### Resources

Provides details of resource popularity, and potential income from those resources across a date range. Also provides details on most watched resources, and total resources in MIDAS.

### Venues

Displays global statistics for venue capacities, venue usage, venue utilization, venue availability, and potential income over a selectable date range. Venue statistics may be filtered by individual venue as well as booking type.

### Users


Displays MIDAS usage statistics including; User activity, Total users, Newest user, and currently logged in users.

### MIDAS

Displays statistics including; Current MIDAS version, Build Date, Change log, and Diagnostics.

# Activity Tracker

MIDAS includes an "activity tracker" that keeps a log of all recent user activity in MIDAS. This recent activity log records logins/outs, failed login attempts, bookings and clients added, modified, or removed, emails sent, database backups, etc.

The activity tracker can be accessed via the  icon in the main toolbar.

Newest activity is shown first, and the log can also be filtered by both user and event category.

Furthermore, user accounts with permission to export data may also export the recent activity log to Excel at any time via the  icon.



Tip: It is possible to set individual users to be "invisible" so that their MIDAS activity won't appear in the "Recent Activity" log - see [Managing Users & Permissions](#)




# Messages, Notes, Watches, & Reminders

## Day Notes


Clicking/tapping the main date heading in the main window will allow you to add notes to the currently selected date (or date range).

These notes will be then shown to all users when they navigate to the date (or any date within the selected range). This feature can therefore be used to remind other users of special dates, public holidays, or other activities taking place to be aware of on specific dates.

To edit or remove notes for a particular date or date range, click/tap on the main date heading at any time.


Any date with notes associated with it will also be indicated on the [Booking Availability](#) screen by the presence of an  icon. Hovering over this icon will display that date's corresponding notes.


## Notification Center

Selecting the  icon in the main toolbar opens the Notification Center.


The Notification Center consists of three sections:

### My Messages

This section displays internal messages you've received from other MIDAS users. You can create and leave a new message for another user by using the small  icon.


 See Also: [Messaging Another User](#)

### My Reminders

This section displays reminders of important bookings you've chosen to be reminded of, and any other custom reminders you have set. To create a custom reminder, use the small  icon.

 See Also: [Setting Reminders](#)

## My Watches

This section displays activity for the venues, booking types, and/or resources you are currently "watching" for booking activity, as well as notifications of low consumable levels. Use the small  icon to adjust your Watch settings

 See Also: [Watches](#)




Tip: Clicking/tapping on the "Messages", "Reminders", or "Watches" icons will show/hide notifications in those categories



Tip: Numbers on the "Messages", "Reminders", or "Watches" icons denote how many live items are currently contained within that section

## Settings


The  icon in the upper right corner of the Notification Center allows you to change notification center settings.

The "Also send messages I receive to my email" and "Also send new watches to my email" options, if selected, will also send to your email address any messages and watch notifications you respectively receive. If the "Only if I'm not logged in" options are additionally selected, you'll only be sent these notifications when you're not logged in.



The "Send Booking Reminders as Calendar events to my email" option will cause booking reminders you set to be sent to your email inbox as Calendar events. If your email software has a companion calendar application (i.e. Outlook/Thunderbird Lightning, etc), you'll be able to add these reminders directly to your companion calendar.

By default, if you have Messages, Reminders or Watches, these will be displayed to you whenever you login to MIDAS. You can suppress this popup by unticking the "Show notifications popup on login" box.

## Message Another User

MIDAS allows you to leave messages to other MIDAS users which they will see whenever they login, or check their messages via the  icon in the main toolbar.

### Leaving a message for other MIDAS users

- Select the  icon in the main toolbar.
- Click/tap the smaller  icon adjacent to the "Messages" icon.
- You'll then be able to enter a message and choose which user (or users) it is for.
- You can also set an expiry date & time for your message, so if the user doesn't log in again until after this time, the message will be automatically removed from their Notification Center.
- Use the "Leave Message" to leave your message for the selected user(s).


### Review previously sent internal messages

- The "Active Sent Items" panel shows all internal messages you've recently sent to other users that have yet to expire.
- Each message's "Status" is indicated to help identify whether the recipient has received/viewed your message.
- You can view each message, or immediately expire (remove) it.


 See Also: [Notification Center](#)

## Setting Reminders

MIDAS allows you to set yourself reminders about forthcoming bookings, or anything else you wish to be reminded about!

Until they expire, your reminders can be viewed via the  icon in the main toolbar, and you may optionally set these to be displayed automatically when you login.

### Setting yourself a reminder of a booking



Navigate to the date of the booking you wish to set yourself a reminder for, and click/tap its booking block. In the pop-up menu, select the  icon.

### Sending booking reminders to your external calendar (Outlook, Lightning, etc)

If your mail client has an associated calendar application (such as Microsoft's Outlook, or Lightning (for Thunderbird)), you can choose to have MIDAS generate and email you a calendar event for any

booking you set a reminder for. Depending upon your mail client, these "events" can usually be added to your external calendar with a single click of an "Accept" button.



To enable/disable this option:

- Select the  icon in the main toolbar.
- Click/tap the  icon in the upper right corner of the Notification Center.
- Enable/Disable the "Send Booking Reminders as Calendar events to my email" option.




Some email clients may also offer you "Decline" and/or "Tentative" options when you receive these automated calendar event emails. It's important to note that these options specifically relate to the adding of the event to your external calendar application only. "Declining" an automated event email will not cancel or remove the booking from MIDAS itself, it simply won't be added to your external calendar

## Setting yourself a reminder for something else

- Select the  icon in the main toolbar.
- Click/tap the smaller  icon adjacent to the "Reminders" icon.
- You'll then be able to enter your own custom reminder and set an expiry for it.
- Use the "Add Reminder" button to save your reminder.
- You will be shown your reminders whenever you login/check your messages up until this expiry date/time, after which the alert will automatically expire.

## Removing a reminder


Reminders are automatically removed after their expiry date, however, you can manually remove a reminder at any time by clicking/tapping the small  icon next to the reminder you wish to remove in your Notification Center.




See Also: [Notification Center](#)

## Watches

MIDAS has the ability to monitor and notify you when certain booking activity occurs within certain venues, or for particular booking types, and/or resources, allowing you to keep track of their usage within MIDAS.

To setup a "watch" of a venue or venues, first select the  icon in the main toolbar.

Click/tap the smaller  icon adjacent to the "Watches" icon. There are three categories of Watch Notifications:

### Watch Booking Activity

Selecting "Bookings" from the Watch drop-down will display options allowing you to select which venue(s), booking type(s), and/or resource(s) you want to monitor for activity.

Additional "AND"/"OR" and "{ }" grouping options are available to further refine your watch settings. "AND" means two or more conditions must be met, "OR" means either condition must be met to "trigger" a watched event. When three conditions are set (i.e. a Venue, Booking Type and Resource), the grouping brackets "{ }" are used to denote which two of these conditions should be matched first before the third. These options are all are best illustrated with some examples:

Example	Options to select
Trigger only when activity occurs for a certain venue only	<Venue>
Trigger only when activity occurs for a certain booking type only	<Booking Type>
Trigger only when activity occurs for a certain resource only	<Resource>
Trigger when activity occurs for either a certain venue or a certain booking type	<Venue> OR <Booking Type>
Trigger when activity occurs for a certain booking type within a certain venue	<Venue> AND <Booking Type>
Trigger only when activity occurs for a certain venue, of a certain booking type, and includes a certain resource	<Venue> AND <Booking Type> AND <Resource>
Trigger only when a certain resource is added either to a certain venue or to a booking of a particular type	<Venue> {OR} <Booking Type> AND <Resource>
Trigger when activity occurs for either a certain venue or when a resource is added to a booking of a particular type	<Venue> OR <Booking Type> {AND} <Resource>

Finally, there are a number of levels of monitoring available for your "watch":

## **New Additions Only**

You will only be notified when new bookings that match your watch conditions are added

## **New Additions & Modifications**

You will be notified of any new additions or modified bookings that match your watch conditions

## **Additions, Modifications & Removals**

You will be notified of all booking activity that matches your watch conditions

## **Removals Only**

You will be notified of all removed bookings that match your watch conditions

## **Modifications & Removals of my bookings by others only**

You will only be notified if another user modifies/removes a booking that you've previously entered into MIDAS


## Watch Consumable Levels

Selecting "Consumables" from the Watch drop-down will list all the consumables defined in MIDAS. You can then set a "threshold" for each consumable, and when the quantity of that consumable falls below the "threshold", MIDAS will trigger a notification for you that that particular consumable is running low, so that you can re-order supplies!

## Watch Venue Availability

Selecting "Consumables" from the Watch drop-down will list all the consumables defined in MIDAS. You can then set a "threshold" for each consumable, and when the quantity of that consumable falls below the "threshold", MIDAS will trigger a notification for you that that particular consumable is running low, so that you can re-order supplies!

Notifications will be displayed whenever you log on to MIDAS (unless you've chosen not to receive such notifications), and whenever you select the  icon in the main toolbar.

Additionally, you can use the "Also notify me of Watches via email" setting to have watch notifications sent to your email address as well. You'll find this setting via the  icon in the upper right corner of the Notification Center.

 See Also: [Notification Center](#)


# MIDAS Admin Options


## Restore Deleted Bookings

If an important booking has accidentally been deleted, the "Restore Deleted Bookings" function allows you to selectively re-instate bookings that have been recently deleted by MIDAS users.

You can restore deleted bookings via the  icon and selecting "Restore Deleted Bookings".

Simply select all the bookings you wish to reinstate, and click/tap the "Restore Booking(s)" button.

Alternatively, you can restore individual bookings direct from the booking grid! Clicking/tapping the  icon in the main window (to the right of the "View" selector) will toggle the showing of recently deleted bookings in the grid. Subsequently clicking/tapping one of these deleted bookings will present you with the option to restore or completely remove the booking.

 **NOTE:** You cannot restore a booking if another booking, which occupies the same date, time, and venue, has been made since the original booking was deleted

## Manage Venues

You can manage venues via the  icon and selecting "Manage Venues".

"Manage Venues" allows you to Add, Remove, or Modify "venues" (rooms/bookable spaces, etc) within your scheduling system.

You can set the maximum occupancy level (capacity) for each venue, as well as specify its "Operating Hours" and hire rates. You can also place venues within "Groups", which can be "filtered" in the booking grid to restrict certain groups of venues to certain users.

From the Manage Venues screen you can also setup venue blocking rules, venue alternatives, assign venue managers and more...



## Add a new Venue

Click/tap the "New Venue" button and proceed to enter the name of the new venue.

## Setting the Maximum Occupancy Level

In the "Capacity" field, enter the maximum number of people your venue can (or is licensed) to hold at any one time. When making bookings for this venue, MIDAS will warn and prevent you from exceeding this capacity.

## Colorizing the Venue

The "Colorize" option allows you to highlight the venue in a chosen color in the booking grid. If you have a large number of venues in your booking system, this may aid in easier identification of similar venues.

## Making the Venue available for public booking/requesting

If you have Public Booking Requests or Public Web Booking enabled, and have assigned one or more Managers to the venue, then you'll be able to select the "Public" option, to allow members of the public to check the availability of this venue, and make booking requests or bookings for it.

## Setting Venue Hours

By default, MIDAS will assume that the venue will be available for booking 24 hours a day, 7 days a week. If this is not the case and you wish to restrict booking when you're closed, then you can define your "Operating Hours" for each day of the week, and/or any periods when your venue is closed completely via the "Hours" tab.

### Setting daily operating hours


The "Hours of Operation" tab in the "Hours" panel is a grid of 24 x 7 squares, each representing a 1-hour time slot during the week. A fully green square means the venue is "open" during that particular hour. A fully red square indicates the venue is "closed" during that hour. Left-clicking a square will toggle its open/closed state. Right-clicking a square instead will allow you to "close" the venue in 15-minute portions of that hour.




Tip: Select the "All Venues" tick box to copy the Operating Hours you've set for the current venue to all venues when the "Save Changes" button is clicked/tapped

### Close Venues over a number of days


The "Closed Between" tab in the "Hours" panel allows you to close venues entirely between two dates (i.e. if your venue is closed for maintenance, refurbishment, public holidays, etc) by defining a series of "Closed From" and "Closed Until" Date.


Click the  icon in the lower right corner to add a new Closed From/Closed Until date range, and then use the calendar to the left to populate each date.

You can modify an existing Closed From/Until date by selecting it and then picking a new date from the calendar.

You can remove a Closed From/Until date by clicking its adjacent  icon.

If only one date is specified in a Closed From/Until date pair, i.e. a "Closed Until" date is set but no "Closed From" date, then no bookings can be made for this venue prior to this date. This may be useful if you have new facilities being built that aren't coming "on-line" for several months - you can add them to MIDAS now, but not take bookings before its opening!

 Users will not be able to make bookings when your venues are closed, unless they have been granted the "Can Book Outside Operating Hours" permission

 See Also: [Managing Users & Permissions](#)

## Setting Venue Rates

MIDAS allows you to define hire charges for each of your venues via the "Rates" tab.

On this tab, the "All Days" option allows you to set your rates to apply to every day of the week. With the "All Days" box unticked, you can specify different rates for each day of the week.


Venues can be charged "per booking", "per person", "per hour" or "per day".

You can furthermore specify different rates based on the length of a booking. For example, you could charge a room at \$100/hour for bookings lasting up to 4 hours long, and then only charge \$60/hour for bookings lasting longer than 4 hours.

Rates are specified exclusive of tax, with the Tax field being used to denote a percentage of tax to be applied to the selected venue's rates.

## Defining Venue "Managers"

The "Managers" tab lists all users who have been granted the "Can Process Web Requests" permission. Selecting one or more such users from this list will make them "Managers" of that venue - this means that they are authorized to approve/reject booking requests for that venue.

 If more than one user is setup as a "Manager" of a venue, any of these users can approve/reject booking requests for that venue

 See Also: [Managing Users & Permissions](#) | [Booking Requests](#)

## Blocking other Venues

The "Blocking" tab allows you to setup a list of venues that will automatically be made "Unavailable" when a booking is taking place in the currently selected venue.

For example, let's assume you have a large Hall that can be booked in its entirety or as two halves. You could add this to MIDAS as three individual venues; "Hall" (representing the entire hall space), and "Half Hall A" and "Half Hall B" each representing the two individual halves of the hall. "Hall A" and "Hall B" could both have bookings running concurrently, but "Hall" and "Half Hall A", for instance, couldn't. So, you can use venue "Blocking" rules to set "Half Hall A" and "Half Hall B" to both become "Unavailable" when "Hall" is booked, and "Hall" to become "Unavailable" whenever either "Half Hall A" or "Half Hall B" are booked.

 **Tip:** A [user permissions](#) ("Can Bypass Venue Blocks") may be set to allow individual users to be able to bypass any venue blocks in operation

## Specifying Alternative Venues

The "Alternatives" tab allows you to select other suitable venues to be offered to users in the event that the selected venue is "Unavailable" when checking its availability.

## Adding a Venue Description

The "Description" tab allows you to enter additional details/a description of the venue. This description is shown in a tooltip when a user hovers over the venue name in the booking grid, or over a venue in the public booking request form. HTML is allowed in this description, meaning that you can include photos/images of your venue too!

Once you've finished making changes to a venue, click/tap the "Save Changes" button to save the venue.

## Modify an existing Venue

Select the venue you wish to modify from the "All Venues" list, and details for the selected venue will appear to the right.

Rename, change the capacity, Operating Hours, rates, groups, or managers of the venue, and click/tap "Save Changes" once complete.

If you rename a venue, all existing bookings for that venue will be updated to reflect the new venue name.

## Modifying multiple Venues

If you select more than one venue from the "All Venues" list, you'll be able to "bulk modify" all selected venues in one action.

The "Save Changes" button will indicate the number of venues you currently have selected, and when clicked, you'll be asked to confirm which particular venue settings (i.e. rates, hours of operation, etc) you wish to apply to all the selected venues.



Note: You cannot modify venue names when multiple venues are selected

## Removing Venues

Select the venue (or venues) you wish to remove from the "All Venues" list, then click/tap the "Remove" button. After confirmation, the selected venue(s) will be removed from MIDAS, along with any bookings they contained.



Warning: When a venue is deleted, all existing bookings for that venue will also be removed!

## Re-ordering Venues

MIDAS allows you to change the order in which your venues appear within the software.

Select a venue and then use the arrow buttons alongside the venue list to move the selected venue up or down in the list.

Once you are happy with the order of your venues, click/tap the "Save Changes" button to save the new order.

## "Grouping" venues

In MIDAS you can "group" similar venues together and filter them in the main window to only display venues in the selected group. Venues can appear in multiple groups. You can also restrict access to certain "groups" on a per user basis.



See Also: [Managing Users & Permissions](#)

## Creating a new "Group" of venues

Select the "Groups" tab, and then click/tab the "New Group" button. You will then be prompted to enter a name for your new group. Once created, you can then assign your venues to the group.

## Adding/removing venues to/from a "Group"

Select a venue from the "All Venues" list.

Select the "Groups" tab and hi-light all the venue groups in which the selected venue should appear. Click/tap "Save Changes" when done.

## Renaming an existing "Group"

From the "Groups" tab, select the group you wish to rename "Groups" tab, and then click/tap "Rename Group". You will then be prompted to enter a new name for the group.

## Deleting a "Group"

From the "Groups" tab, select the group you wish to remove, and click/tap "Remove Group".



Removing a venue group will only remove the group itself, the venues that were contained within the group will remain after a group has been removed

## Manage Booking Types

"Manage Booking Types" allows you to Add, Remove, Rename, and set the color of different Booking "Types" - Grouping similar bookings together in this way make them visually easier to identify in the booking grid. All currently defined Booking Types are listed, and their corresponding colors are shown in the palette.

### Adding a New Booking Type

- Click/tap the "New Type" button.
- Proceed to enter a unique name for your new booking "type", and select a color for this type of booking from the color palette.
- The "Booking Type Discount" field can be used to apply a fixed or a percentage discount to bookings of the selected type. For example, if you normally charge \$100/hour to hire a room for corporate events, you could setup a "Community" booking type with a booking type discount of 60% meaning that the same room would only be charged at \$40/hour if it's assigned your "Community" booking type.
- Select "Save Changes" to save your new Booking Type. Once saved it will appear in the "All Booking Types" list, and be accessible throughout MIDAS.

### Modifying a Booking Type

- Select the Booking Type you wish to modify from the "All Booking Types" list.
- The name and color of the selected Booking Type will then appear in the "Booking Type Details" area.
- Enter a new name and/or select a new color, then select "Save Changes"



If renaming a Booking Type, MIDAS will automatically change all existing bookings of the original booking type to that of the new Booking Type



Tip: Try to choose colors which are substantially different to each other in order to make each booking type more distinguishable in the booking grid

## Marking a Booking Type "Public"


If you've enabled the public request/booking features of MIDAS, and also enabled the Booking Type selector to show in these public areas, only those booking types which you also mark as "Public" will be included in the list of booking types available for selection on public request/booking screens. This allows you, for example, to "hide" your internal booking types from public selection.

## Setting a Default Booking Type

If you set a particular booking type as the default, then if bookings are added without a booking type being selected (or if the booking type selector is hidden from the user entirely), the bookings will automatically be added under the booking type which has been set as the default.

## Deleting a Booking Type

- Select the Booking Type you wish to modify from the "All Booking Types" list.
- Click/tap "Remove Type" to remove the selected Booking Type.
- After confirmation, the Booking Type will be removed, and MIDAS will automatically remove all existing bookings from its database that matched that Booking Type.

 **Warning:** When a booking type is removed, you are given the option to also remove all bookings within MIDAS of that particular booking type

# Manage Resources

The "Manage Resources" screen allows you to define an inventory of resources that may be assigned to your bookings.

By default, resources may be assigned to one of three "base" categories; Equipment, Consumables, and Staffing. The differences between each base category are outlined below:

## Equipment

Resources categorized as "Equipment" are those which are charged per booking, irrespective of the length of a booking. For example, a Flip Chart may be added to this section, as its charge would be the same for 30mins or 2hours. The "Quantity Available" allows you to define how many flipcharts are available site-wide at any one time. So, if you own 5 flipcharts, set the "Quantity Available" to 5. MIDAS will then not allow more than 5 flipcharts to be in-use at the same time.

## Consumables

Resources categorized as "Consumables" are those which would only be used one-time, and cannot be reused. For example, paper for a flipchart could be classed as a consumable. The "Quantity Available" figure is very fluid in this category. For example, you may have bulk purchased 100 flipchart paper pads, so you would set the "Quantity Available" to 100. However, unlike the other categories,

whenever a quantity of a consumable is added to a booking, the remaining "Quantity Available" of that resource decreases by the same amount. i.e. once all 100 flipchart pads have been used, they will no longer be able to be added to bookings, until your stocks are replenished, and the "Quantity Available" updated accordingly. Consumables, like Equipment, are charged per booking.

## Staffing

Staffing is a section to list human resources you have available to clients. These are charged per hour when added to bookings. For example, you may have 3 AV Technician's on staff, with an hourly rate of \$40. Adding these details to the Staffing section of resources will allow your staff to be allocated to bookings and the client charged accordingly.

## Adding a New Resource

Click/tap the "Add" button underneath the list of existing resources. You will then be prompted to enter the name of your new resource and the quantity you have available at any one time. You can also set the associated charge (exclusive of tax) for use of this resource by a client, and the percentage rate of tax to be applied to the charge. Before clicking/tapping the "Add" button to add your new resource, check that you've categorized the resource (see above).


Additionally, if the Resource field has been enabled for your Public screens, you'll then be able to tick the "Public" box for each resource you wish to appear on these screens.

➔ See Also: [Manage Fields](#)


By default, resources that you add will be available across all of your venues. To make a resource venue-specific, so that it can only be assigned to certain venues, untick the Limit To "All Venues" box. When unticked, a list of your venues will be displayed allowing you to select one or more venues that your resource will be available to.

➔ See Also: [Adding Resources To Bookings](#)

## Modifying an Existing Resource

Click/tap the small  icon alongside the existing resource you wish to modify, make your changes, and click/tap the "Modify" button.

## Removing a Resource

Click/tap the small  icon alongside the resource you wish to remove from MIDAS.

 **Warning: Removing a resource will also remove it from any existing bookings**



## Adding a Custom Resource Category

In addition to the three standard "Equipment", "Consumables", and "Staffing" categories, you can also create additional custom resource categories.


To add a custom resource category, switch to the "Categories" tab on the Manage Resources screen, and select the "New Category" button in the upper right corner.

Proceed to enter the display name of your new custom category, and select which of the three "base" categories you wish resources assigned to this custom category to act like. Refer to the descriptions above if you're unsure of the differences in behavior between each of the three base categories.


Click "Add" to add your custom resource category to the system.

You'll then be able to add new resources/modify existing resources and assign them to your new custom resource category.

## Modifying a Custom Resource Category

To modify the name or base category of a custom resource category, switch to the "Categories" tab on the Manage Resources screen, and click/tap the small  icon alongside the existing custom resource category you wish to modify. Proceed to make your changes, and then click/tap "Modify" when done.

## Removing a Custom Resource Category

To remove a custom resource category, switch to the "Categories" tab on the Manage Resources screen, and click/tap the small  icon alongside the custom resource category you wish to remove from MIDAS. After confirmation, the custom category will be removed and any resources that were previously assigned to that category will be automatically reassigned to the base category of the removed custom category.

## Manage Users and Permissions

"Manage Users & Permissions" gives you extensive control over user accounts. Use this option to add/remove users, and to control which MIDAS features each user has access to. Active Directory integration can also be enabled and configured from this screen.

➔ For more information on Active Directory integration, please refer to the dedicated documentation available online at <https://mid.as/active-directory-integration>

There are three tabs on the Manage Users & Permissions screen:

**Users** – From this tab you can add a new user, remove an existing user, or modify an existing user's details or permissions.

**Groups** – For this tab you can define a new a new user group, remove an existing user group, or modify the permissions on an existing group.

**Single Sign-On (SSO)** – From this tab you can configure and enable/disable single-sign on integration with an Active Directory

### Adding a New User

- On the "Users" tab, click/tap the "Add New User" button. You can then proceed to add details for the new user.
- Enter the new user's full name and e-mail address in the "User Settings" area - it is important to enter a valid email address, as the user will require this if they need to reset a lost/forgotten password.
- Enter a "password" for the user, or use the "Random" button to automatically generate a random password.

 **Remember: Passwords are case sensitive**

- If you would like MIDAS to automatically e-mail the new user their login and MIDAS access details, ensure that the "Auto send User their Login details via email" option is checked.
- If the "User must change password on next login" option is selected, the next time the user logs in to MIDAS they will be prompted to change their password - It is recommended that this option is selected, especially if you have generated a "random" password for that user, which will be difficult to remember.
- If the new user is likely to be making bookings with themselves as the "client", ticking the "Also add user as a client" option will also create a client entry for the new user.
- Manually set "permissions" (privileges) for the user from the list of available "User Permissions", or use the "Assign Permissions From Group" drop-down to use current permissions from an existing user group.
- Select "Save Changes" when complete to add the user to MIDAS.



If you have enabled Single Sign-On (Active Directory) authentication with the "Update User Permissions upon each authentication" option, user's permissions will be updated whenever they access MIDAS with current permissions from the user group in MIDAS matching their Primary Group in your Active Directory

## Cloning (copying) a User

- On the "Users" tab, select the existing user whose permissions you wish to "clone" (Create a New User based on the User Permissions of another user).
- Select the "Add New User" button.
- The "User Settings" area will be cleared allowing you to add details for the new user.
- The rest of the "permissions" (privileges) will have remained from the previously selected user. You may adjust these for your new user accordingly.
- Select "Save Changes" when complete to add the new user to MIDAS.

## Modifying a User

- On the "Users" tab, select the user you wish to modify from the list of users.
- The selected user's settings and permissions will then be displayed.
- Make changes to the user's settings/permissions as necessary and select "Save Changes" when done.



NOTE: For security, the user's password is not displayed when modifying. Only add text to this field if you wish to change the user's password. Leaving it blank when proceeding to "Save Changes" will leave the user's current password unchanged



If you have enabled Single Sign-On (Active Directory) authentication with the "Update User Permissions upon each authentication" option, user's permissions will be updated whenever they access MIDAS with current permissions from the user group in MIDAS matching their Primary Group in your Active Directory

## Removing a User

- On the "Users" tab, select the user you wish to delete from MIDAS from the left-hand list of current users, and then click/tap the "Remove Selected User" button.




Only the user will be removed - any bookings made by that user will still remain in MIDAS



If you have enabled Single Sign-On (Active Directory) authentication, removing a user will only be temporary – the next time that user authenticates, they will be added back to MIDAS. In such instances, "Suspending" the user (via the "Account is Suspended" option) rather than removing them, will revoke their access

## Changing/Resetting a User's password

- Users can change their own password at any time using the [Change Password] link at the top of the screen when logged in.
- Administrators can also change/reset a user's password for them (via MIDAS Admin Options → Manage Users & Permissions → [select user]), by entering a new password for the user (or selecting the "Random" button to generate a random password), and then clicking/tapping "Save Changes".

 **Tip:** After entering a new password for the user, before proceeding to "Save Changes", tick the "Auto send User their Login details via email" option to have MIDAS send the new password to the user via email

## Forcing a User to change their password at next Login

- Select the user who you wish to force to change their password upon their next login from the left-hand list of current users.
- The selected user's details and permissions will be displayed to the right.
- Select the "User must change password on next login" option, without altering any other settings, then select "Save Changes".
- The user will then be prompted to change their password the next time they login to MIDAS.

## Re-showing the Quick Tour at user's next Login


The Quick Tour provides a brief overview of the user interface when each user logs in for the first time. If the user has chosen to suppress the Quick Tour, an administrator can re-enable it on their account.

- Select the user who you wish to the Quick Tour option to again from the left-hand list of current users.
- The selected user's details and permissions will be displayed to the right.
- Select the "Show Quick Tour upon user's next login?" option, then select "Save Changes".
- The user will be invited to undertake a quick tour of the user interface the next time they login.

## Users on unstable connections


As part of MIDAS' pro-active approach to security, if MIDAS detects that a user's IP address changes whilst they're logged in, they will be automatically logged out of the system and will have to re login. If the user is on an unstable internet connection and are being frequently logged out due to a fluctuating IP address, you can relax this security measure for their user account.

- Select the user who is being frequently logged out due to a changing IP address from the left-hand list of current users.
- The selected user's details and permissions will be displayed to the right.
- Select the "User is on an unstable connection" option, then select "Save Changes".
- The user will no longer be automatically logged out if their IP address changes.

 We only recommend setting the above option temporarily, and only frequently logged out users for the duration that their IP address is fluctuating

## Suspending/Unlocking a User Account

- Tick the "Account is suspended" to prevent the user from logging in.
- Untick the "Account is suspended" to allow the user to log in.
- Note: Individual accounts will be automatically suspended if the "Max Failed Login Attempts" setting has been reached for that account. If this happens, the user account will remain suspended until either you untick the "Account is suspended" option for that user, or the user restores access to their account themselves (an activation email will be sent to the email address associated with their account if their account exceeds the "Max Failed Login Attempts" setting).


 See Also: [Managing Security Settings](#)

## User Groups

"User Groups" allow you to define sets of permissions that can then be easily applied to individual user accounts. This saves you from having to manually define each permission for each user at a time. Instead, the "Apply Permissions from Group" drop-down list on the "Users" tab will allow you to quickly update the selected user's permissions with the permissions assigned to a particular user group.

In addition, if you have enabled Single-Sign On (Active Directory) authentication for your MIDAS, User Groups are used to determine the permissions assigned to each user who authenticates via your Active Directory.


In such instances, MIDAS user permissions will be assigned from a MIDAS User Group with the same corresponding name as the user's "Primary Group" name in your Active Directory.

 For more information, please refer to the dedicated Active Directory Integration documentation available online at <https://mid.as/active-directory-integration>

## List of Available User and Group Permissions

The following user permissions can be set on a "per user" or user group basis:

Setting	Description
Can Change Password	<p>Allow/Deny the user the ability to change their password at any time.</p> <p><b>Note:</b> This option is not applicable to "Group" permissions, and has no affect if you have enabled Single-Sign On (Active Directory) authentication</p>
Can Make Bookings	<p>Allow/Deny the user the ability to add new bookings to MIDAS. Available options are:</p> <p><b>No</b> - User cannot add any bookings</p> <p><b>Yes (For any client)</b> - User can add new bookings for any client</p> <p><b>Yes (For self only)</b> - User can add new bookings for themselves (as the client) only</p> <p><b>Requests Only (For any client)</b> - User can only make booking requests for any client (bookings which must first be approved by a MIDAS user with "Can Process Booking Requests" permission)</p> <p><b>Requests Only (For self only)</b> - User can only make booking requests for themselves (as the client) only (bookings which must first be approved by a MIDAS user with "Can Process Booking Requests" permission)</p>
Can Make Historical Bookings	<p>Allow/Deny the user the ability to add bookings for dates earlier than the current date (i.e. in the past) - useful for maintaining accurate booking records.</p>
Can Book Outside Operating Hours	<p>Allow/Deny the user the ability to make bookings which fall outside the normal "Operating Hours" of each venue.</p>
Can Bypass Venue Blocks	<p>Allow/Deny the user the ability to book even if a venue is blocked due to <a href="#">venue blocking</a> rules in effect.</p>
Can Modify Bookings	<p>Controls how the user can modify bookings. Options are:</p> <p><b>No</b> - User cannot modify any bookings</p> <p><b>Own Bookings</b> - User can only modify bookings they originally entered</p> <p><b>All Bookings</b> - User can modify any booking</p>
Can Delete Bookings	<p>Controls how the user can remove bookings. Options are:</p> <p><b>No</b> - User cannot remove any bookings</p> <p><b>Own Bookings</b> - User can only remove bookings they originally entered</p> <p><b>All Bookings</b> - User can remove any booking</p>
Can Add Clients	<p>Allow/Deny the user the ability to add new clients to MIDAS</p>
Can Modify Clients	<p>Allow/Deny the user the ability to modify existing clients in MIDAS</p>
Can Delete Clients	<p>Allow/Deny the user the ability to remove existing clients from MIDAS</p>
Can Email Clients	<p>Allow/Deny the user the ability to directly email clients from within MIDAS</p>
Can View Client Info	<p>Controls the level of client information displayed to the user. Options are:</p> <p><b>No</b> - User cannot see who has made a booking, only that a venue is "Unavailable"</p> <p><b>Client/Org Only</b> - User can only see client's names &amp; organizations</p> <p><b>Full Info</b> - User can view all client contact info (addresses, phone, fax, etc)</p>

	<b>Own Bookings</b> - User will only see booking and client information for their own bookings. Other user's booking's will simply display in the booking grid as "Unavailable" time slots
Can Print (Bookings)	Allow/Deny the user the ability to print booking data
Can Print (Emergency Evacuation Data)	Allow/Deny the user the ability to instantly print out ongoing bookings at that point in time (Useful in the event of an Emergency, so you can instantly see who is on-site and where)
Can use Invoicing	<p>Allow/Deny the user the ability access to MIDAS's Invoicing features. Options are:</p> <p><b>No</b> - User has no access to any of the invoicing features</p> <p><b>Yes</b> - User has full access to all of the invoicing features</p> <p><b>Limited</b> - User may create/generate invoices, but may only view/modify/delete invoices which they created/generated (i.e. they will not have access to invoices added by other users)</p> <p><b>View Only</b> - User may view all invoices, but will have no access to print, email, modify, delete, generate or create invoices (i.e. read only access)</p>
Can process Booking Requests	<p>Allow/Deny the user access to "Pending Booking Requests" to approve/reject incoming booking requests.</p> <div>  <p>Remember: You'll also need to assign the user to be a "<u>Manager</u>" of the specific venue(s) you wish them to be able to process booking requests for</p> </div>
Can use My Messages	Allow/Deny the user use of the "My Messages" feature
Can Search	Allow/Deny the user access to the Search facility
Can make Day Notes	Allow/Deny the user the ability to attach notes/reminders, viewable by all users, to specific dates. To edit notes; use the main calendar to navigate to the date you wish to add notes to, then click/tap the full date (just above the "Logged in as" line)
Can use Activity tracking	Allow/Deny the user use of the "Big Brother" feature - a log of recent activity by MIDAS users
Can use Statistics	Allow/Deny the user to view Statistics about bookings, clients, venues, invoices, resources, and users
Can Restore Bookings	Allow/Deny the user the ability to restore recently deleted bookings
Can Manage Booking Types	Allow/Deny the user the ability to add/modify/remove Booking Types
Can Manage Resources	Allow/Deny the user the ability to add/remove common Resources
Can Manage Venues	Allow/Deny the user the ability to add/modify/remove/group Venues
Can Manage Users	Allow/Deny the user the ability to add/remove users & set user permissions
Can Import / Export	<p>Controls whether the user can import data into or export from MIDAS. Options are:</p> <p><b>No</b> - User can neither import nor export data</p> <p><b>Import Only</b> - User can import data but cannot export data</p> <p><b>Export Only</b> - User can export data but cannot import data</p> <p><b>Yes</b> - User can both import data into and export data from MIDAS</p>




Can Manage MIDAS	Allow/Deny the user the ability to manage key MIDAS settings
Can Manage Addons	Allow/Deny the user access to settings for optional addons. For more information on available addons for MIDAS, please see <a href="https://mid.as/addons">https://mid.as/addons</a>
Is Invisible	Controls the level of logging of a user's MIDAS activity. Options are: <b>No</b> - All user's activity is logged by MIDAS (accessible via "Recent Activity") <b>Login/Outs Invisible</b> - All user's activity except their logins and outs is recorded <b>Full Invisibility</b> - Nothing the user does is recorded in the <a href="#">Recent Activity</a> log
Maximum bookings allowed	Allows you to limit the total number of bookings the user can add to any individual calendar date, week, month, or year. Leave blank for no limit
Maximum booking length	Allows you to limit the maximum length/duration (in minutes) the user can make any single booking for. Leave blank for no limit
View Access	Controls which "groups" of venues the user has access to. This can be used to restrict which venues a user has access to and "hide" venues from users. Users will only be able to filter their booking grids by the venue groups for which they have been granted access <div>💡 You can quickly toggle the currently selected groups by clicking/tapping on the "View Access" words</div>
Day Starts At X and runs for Y hours	By default, a day starts at Midnight and runs for 24 hours. If your operations are only 9am - 5pm, for example, you can restrict MIDAS to only show and allow access to this portion of the day. Alternatively, if you run a night time entertainment venue, with operating hours from 7pm - 3am, setting the "Day starts at" to "19:00" and the "and runs for" setting to "8" hours will then restrict MIDAS to those times <div>📘 Note: If you restrict a user's hours in this way, the user will only be able to view those hours in the booking grid - they will no longer have access to the multiple day view</div>
Times Selector	If " <a href="#">Time Lists</a> " have been setup in your MIDAS, this field will allow you to assign a "Time List" to this user, that is, the list of time periods/durations they will be allowed to select from when making bookings. If set to "Times", the user will be presented with standard Start/Finish time selectors

📘 For security, the primary/initial MIDAS user will always have access to manage users and MIDAS and cannot be deleted

## Single-Sign On (SSO)

If present, the Single-Sign On (SSO) tab of the "Manage Users & Permissions" screen allows you to enable and configure integration with an Active Directory, allowing users to seamlessly login to MIDAS without having to enter credentials each time.

 **IMPORTANT:** Single-Sign On (SSO) Active Directory support is only available if your MIDAS is "self hosted" AND licensed for "Unlimited" users

 For more information, please refer to the dedicated Active Directory Integration documentation available online at <https://mid.as/active-directory-integration>

## Import and Export

### Importing Data

MIDAS allows importing of bookings, clients, or users from 3rd party applications or other sources.

 For more information and instructions on importing data into your MIDAS, please refer to our [Knowledge Base](#)

### Exporting Data

MIDAS allows data to be exported in a range of different formats for use elsewhere in 3rd party applications, for example spreadsheets, calendar programs, finance packages, etc.

From the export screen, select the type of data your wish to export:

- Bookings
- Clients
- Invoices
- Resources
- Users

### Export Bookings

Select the date range of bookings you wish to export, and the desired export format, then click Export. Available export formats include:

- CSV File (.csv) - Comma Separated Values
- Excel 2007+ (.xlsx)
- iCal Format
- Tab-Delimited Text File
- XML Data

## Export Clients

By default, exporting clients will export all clients in the database. However, however you may choose to only export clients who have bookings over a certain date range by de-selecting the "All Clients" tick box and selecting a date range.

Then select the desired export format and click Export. Available export formats include:

- CSV File (.csv) - Comma Separated Values
- Excel 2007+ (.xlsx)
- Tab-Delimited Text File
- XML Data

## Export Invoices

Select the type of invoices to be exported. Options include "Regular", "Deposit", "Cancellation", and "Credit Notes". Next, select the desired export format. Additional options may be presented depending upon the format chosen. Click Export to export data. Available export formats include:

- CSV File
- CSV File (Clear Books)
- CSV File (KashFlow)
- CSV File (Quickbooks Online)
- CSV File (QuickFile)
- CSV File (Sage Business Cloud)
- CSV File (Xero)
- CSV File (Zoho Invoice)
- Excel 2007+ (.xlsx)
- Tab-Delimited Text File
- XML Data

## Export Resources

Select the desired export format and click Export. Available export formats include:

- CSV File (.csv) - Comma Separated Values
- Excel 2007+ (.xlsx)
- Tab-Delimited Text File
- XML Data

## Export Users

Select the desired export format and click Export. Available export formats include:

- CSV File (.csv) - Comma Separated Values
- Excel 2007+ (.xlsx)
- Tab-Delimited Text File
- XML Data

## Manage MIDAS

### Managing Appearance Settings

This section allows you to control a number of visual aspects of the MIDAS interface, including visual "Themes" and Date/Time settings:

#### Default View

The "Default View" option sets which "group" of venues (venue group) will be displayed initially to users upon login. Where a given user does not have access to this venue group, the first group they do have access to will be initially displayed instead.

#### Default Language

The "Default Language" option sets the initial display language for MIDAS. If the "Show Language Selector on login page" option is also selected, users will be allowed to change their display language whenever they login, otherwise the default language will be used throughout.

#### Theme Settings

##### Default Theme

Specifies the visual Theme MIDAS should use by default.

##### Allow Users to select theme at login

This option will present all MIDAS users a drop-down list of installed themes on the Login page, allowing them to select a different visual theme for their session. Please note, that this setting has no affect if only one theme is installed.

➔ MIDAS Knowledge Base: [How to customize the appearance of MIDAS](#)

#### Your Logo

You may co-brand your MIDAS system to include your organization's logo throughout the software. This logo may then also be included in various [editable templates](#) (email, print, invoice, etc) through the inclusion of the %LOGO% variable.

Click the "Select File..." button to select a .png image from your computer to upload and install as your logo.

➔ MIDAS Knowledge Base: [How to add your company/corporate logo](#)

## Date/Time Settings

This section controls how dates and times are displayed in MIDAS:

### Date Format

Controls the order in which dates are displayed, i.e. day before month, month before day, 2 or 4 digit years, etc.

### Date Separator

Allows changing of the single character used to separate the day, month, and year segments of dates.

### Time Format

Switches between a 24 hour or 12 hour clock, with the two "12h Format" boxes providing control over "AM" and "PM" symbols under a 12 hour clock.

### Time Separator

Allows changing of the single character used to separate hours and minutes.

If the "Show Date Before Time" option is selected, then where both date and time information are displayed together, the information will be displayed with the date first, followed by the time. If unselected, times will be shown before dates.

### Date / Time Separator

Allows control over the visual "link" between dates and times. For example, a value of " @ ", would display dates & times in a similar manner as follows: 17/08/2007 @ 14:06.

### Time / Time Separator

Allows control over the visual "link" between two times. For example, a value of " - ", would display a time range in a similar manner as follows: 14:00 - 15:00.

### Default Interval

Rather than displaying every single minute (0-60) in time drop-downs when adding or modifying a booking, this setting allows you to "round" minutes to, for example, the nearest 5-minute interval, if you don't need to book to the minute.

### Week starts on

Sets which day of the week MIDAS should consider as being the first day of the week.

### Timezone

Nearly 300 pre-defined time zones are available in a drop-down list, allowing you to specify the time zone in which your MIDAS should run. The "Custom" option at the bottom of the drop-down list allows defining your own custom time zone.



For more information on defining a custom timezone, please see [this article](#)

## Booking Grid Settings

This section controls the appearance of bookings in the booking grid:

### Show on Blocks

Specify up to two booking fields (or three if the Venue Height setting (see below) is at least 40) to show on blocks within the booking grid. You can choose to show just the field's value or its name and its value on booking blocks.

### Show on Tooltips

Specify up to two booking fields to show when "hovering" over blocks within the booking grid. You can choose to show just the field's value or its name and its value on tooltips.

### Venue Height

Specifies the height (in pixels) of each "row" in the booking grid. Increase this value to show bigger blocks in the grid.

### Venue Width

Specifies the width (in pixels) of the first column in the booking grid. This column usually contains the venue name. Increase this value if you have long venue names that don't fully fit into the first column.

### Number of days to show by default

The booking grid can display 1 day – 8 weeks' worth of bookings on a single screen. Use this setting to control how many days are shown by default (up to 14).

### Background data refresh

When viewing the booking grid, MIDAS can silently perform regular background checks on the bookings currently shown on your screen and update your display accordingly if any have changed since your display was first generated. Lower values will perform these checks more often, but will increase the number of requests sent to and data received from your server. In most cases, it should not be necessary to change this setting.

### Show on Month Cells

Specify a default booking field to show on dates within the monthly overview.

### Users can choose what's shown on month cells

If selected, allows users to select any booking field to view on the monthly overview. If not selected, all users will only see the monthly overview using the above "Show on Month Cells" setting.

## Managing Booking Settings

There are a number of sub-settings under the "Default Settings" tab. These are:

### Booking Availability


#### Booking Alternatives

These settings allow MIDAS to offer alternative venues/times if the desired venue/times are unavailable.

Three main options are available:

- **Offer the desired times in an alternate venue** - When selected and the desired venue is unavailable, MIDAS will offer alternative venues at the same times

Example: Room 1 is unavailable between 2pm-3pm, MIDAS will try to offer Room 2 between 2pm-3pm as an alternative

 You can select which venues should be offered as alternatives via the "Alternatives" tab on the [Manage Venues](#) screen

MIDAS allows you to control which venues each of your "Resources" are available to. As a result, when offering an alternative venue, any resources you may have assigned to the booking may not be available in a different venue. The "Ignore resource venue restrictions when offering alternate venues" option lifts this restriction, meaning that if you have a resource, for example "Digital Projector" that's only been made available to "Room 1", and an alternative venue to "Room 1" is "Room 2", the Digital Projector will also be available to Room 2 in such circumstances.

- **Offer an earlier time/day in the desired venue** - When selected and the desired times are unavailable, MIDAS will try to offer an earlier time slot or the previous day in the same venue

Example: Room 1 is unavailable between 2pm-3pm, MIDAS will try to offer Room 1 between 1pm-2pm as an alternative

Example: Room 1 is unavailable between 2pm-3pm on Tuesday, MIDAS will try to offer Room 1 between 2pm-3pm on Monday as an alternative

- **Offer a later time/day in the desired venue** - When selected and the desired times are unavailable, MIDAS will try to offer a later time slot or the next day in the same venue

Example: Room 1 is unavailable between 2pm-3pm, MIDAS will try to offer Room 1 between 3pm-4pm as an alternative

Example: Room 1 is unavailable between 2pm-3pm on Tuesday, MIDAS will try to offer Room 1 between 2pm-3pm on Wednesday as an alternative.

An option to maintain a "gap" (spacing) when offering earlier/later alternative times is also available. For example, if set to 15 (minutes), then:

Example: Room 1 is unavailable between 2pm-3pm, MIDAS will try to offer Room 1 between 12:45pm-1:45pm as an earlier alternative

Example: Room 1 is unavailable between 2pm-3pm, MIDAS will try to offer Room 1 between 2:15pm-3:15pm as a later alternative

## **Account for Pending Booking Requests when checking Booking Availability**

By default, when making bookings or booking requests, MIDAS doesn't take into account any outstanding Pending Booking Requests when checking Booking Availability. For example, if a booking request is currently "pending" for Room 1 on Monday from 9am-10am, whilst it remains "pending", other actual bookings or booking requests can still be made for this same venue/time slot. To prevent any other bookings or requests from being made in slots where "pending" booking requests are still awaiting approval, select this option. MIDAS will then show "Unavailable" for subsequent bookings or booking requests that would conflict with outstanding booking requests.

## **Setup / Breakdown Times**

These settings control how Setup and Breakdown times should be handled.

### **Times shown on Booking Availability screen should include Setup / Breakdown times**

If enabled, then the times displayed on Booking Availability screen will include any setup/breakdown period. For example, if a booking is added from 10am - 11am with a 30min setup and 15min breakdown, with this setting enabled, the booking times will be shown as 9:30am - 11:15am on the Booking Availability screen.

With this setting disabled, times shown on the Booking Availability screen won't include any setup/breakdown times. (Note: This won't affect actual booking availability)

### **Setup / Breakdown times for bookings can overlap other bookings**

These settings control whether setup and/or breakdown times should be taken into account when checking venue availability. If enabled, setup and/or breakdown periods can overlap with those of other bookings. If disabled, setup and/or breakdown periods cannot conflict with the setup/breakdown periods of other bookings.

Take for example an existing booking in a particular venue which ends at 11am, but which has a 15min breakdown period afterwards. The next booking has a 30min setup period.

With the "Setup / Breakdown times for bookings can overlap other bookings" options all disabled, the setup time for the following booking cannot start until 11:15am at the earliest (i.e. once the breakdown period of the previous booking has ended)

However, with the "Setup times for bookings can overlap other bookings" option enabled, the setup time for the following booking could start as early as 11am (i.e. at the same time as the breakdown period for the previous booking)

### **Setup / Breakdown times for resources can overlap other bookings**

Similar to the above settings, however these settings apply when determining resource availability (rather than venue availability). If you allow resource overlapping, then the same resource can be allocated concurrently during one booking's breakdown period and the next booking's setup period.




## Booking Spacing

The Booking Spacing settings enforce a "gap" (free space) in minutes before and/or after bookings which are added or modified. This ensures that there's adequate setup/clean up time between adjacent bookings, so that two consecutive bookings in the same venue don't take place back to back with no break in between.

You'll likely want to set both before and after settings the same, however, the two can be set to different lengths.

For example, settings of "Maintain free space before each new booking of 60 minutes" and "Maintain free space after each new booking of 30 minutes" would mean that when you add a new booking it will only be "Available" if, A) any previous booking in the same venue finished an hour or more before the start of the new booking, and B) any subsequent booking in the same venue starts more than 30 minutes after the finish time of the new booking.

 **Note:** Changes to these settings apply to subsequently added/modified bookings. They are not applied retrospectively to existing bookings

## Miscellaneous

### Enable Tentative Bookings

If selected, [Tentative Bookings](#) will be enabled, and rules for expiring tentative bookings will be automatically enabled.

If unselected, tentative bookings will be disabled and any further auto-expiration of any tentative bookings will be halted.

### Prompt for detailed client information when adding bookings for new clients

If selected, then when adding a booking for a brand-new client, you'll be required to complete all client fields that have been set to be required.

### "Send Booking Confirmation" Option

Sets the default state (on by default / off by default / always on) of the "Send Booking Confirmation" selector which is presented to users on the [Booking Availability](#) screen. The "Send Booking Confirmation" selector itself allows an automated confirmation email to be sent to a client when bookings are added/modified for them.

## Managing Fields

MIDAS gives you extensive control over the fields that appear on the booking screen, public request/public booking screens, search results, print outs, and email booking confirmation notifications.

MIDAS also gives you control over client fields too.

By default, 8 booking fields and 8 client fields are present.

The default booking fields are: Date(s), Times, Venue(s), Attendees, Client, Type, Notes, and Resources. With the exception of the Date(s) and Venue(s) fields, each field can be shown/hidden, and on the booking and request screens also set to be optional or required.

Optional [Setup and Breakdown time](#) fields can also be enabled.

The default client fields are: Client, Organization, e-mail, Address, Phone, Fax, Cell, and Notes. With the exception of the Client field, each field can be shown/hidden or set to optional or requires according to your requirements.

You'll find these settings via MIDAS Admin Options → Manage MIDAS → Fields.

From this screen you toggle between viewing booking fields or client fields. You can also add your own custom booking or client fields....


## Adding a Custom Booking or Client Field

- Switch to the appropriate Booking Fields or Client Fields tab
- Click/tap the "Add Custom Field" button.
- A small window will open allowing you to specify the following:
- Field Name - The display name of your new field.
- Field Type - The type of custom field you wish to add. Available options include:
  - **Checkbox** - A "tick box" field
  - **File** - Allows uploading/attaching of files and documents to bookings or client records\*
  - **List (Single Select)** - A drop-down list of pre-defined items from which a single item may be selected
  - **List (Multi Select)** - A drop-down list of pre-defined items from which multiple items may be selected
  - **Number** - A field that will only accept numerical input
  - **Range** - A "slider" control allowing selection of a numeric value within a defined range
  - **Text** - A single-line text field
  - **Text Area** - A multi-line text field
  - **URL** - A navigable web link to an external resource
- Field Description - A short description describing the purpose of the field. This will be shown to users directly above the field. Simple HTML code may be included, for instance to provide a link to an external document or website.
- List Items - If a "list" Field Type is selected, the items in your custom list may be added here.


- Number of Items to show - If a "list" field type is selected, you can provide a hint to user's browser as to how many list options should be displayed at once without needing to scroll
- Default Value/Item - The default value (or item in case of a list) for the custom field.
- Maximum Length - For Text and Number fields, you can limit the maximum number of characters a user can enter into the field.
- Show Field To - This setting allows you to restrict showing this field to just the user(s) you select, rather than showing it to all users (which is the default).
- Click/tap "Ok" when done to create your new custom field.


 \* The "File" field type is only available in self-hosted editions of MIDAS [\[More Info\]](#)


## Editing a Custom Booking or Client Field

- Switch to the appropriate Booking Fields or Client Fields tab
- Click/tap the  icon alongside the field you wish to edit.
- A small window will open allowing you to modify the custom field (see above for options available in this window).
- Click/tap "Ok" when done to update your custom field.

## Removing a Custom Booking or Client Field

- Switch to the appropriate Booking Fields or Client Fields tab
- Click the  icon alongside the field you wish to delete.

 Default fields cannot be deleted. They can however in most cases be "hidden" if they are not required

 Renaming or removing a custom booking field will automatically update/remove any associated %CUSTOM..% variable references in your [templates](#)

## Re-Ordering Booking Fields

- You can change the order in which fields are shown, via the "Re-order Fields" button at the bottom of the Booking Fields or Client Fields tabs.

## Managing Time Lists


MIDAS allows you to customize, on a per user basis, the "Times" field shown on the Add Bookings screen.

By default, users are shown standard "Start & Finish" time inputs for their bookings.

These "start" & "finish" inputs can be substituted for either a start time and pre-defined duration, or a complete list of pre-defined time "slots" (periods).




Pre-defined time periods are ideal for use in schools or other such environments which have "structured" days. For example, if "Lesson 1" in a school takes place between 8.45am and 9.45pm, instead of users having to manually select these discrete bookings times, they can instead simply select "Lesson 1" from a drop down list on the booking form.

Start times with pre-defined durations instead of a finish time are ideal for use in appointment or "fixed period" scheduling applications. For example, if all your bookings or appointments are either 30 or 45 minutes in length, instead of having to set a start time and then work out the end time, this option allows you to simply set a start time, and then pick either "30 minutes" or "45 minutes" from a simple drop-down list. You can also use this feature to restrict certain users to only make bookings of a fixed length of time by simply creating a duration list for them with just a single entry.



Pre-defined duration/period time lists can be setup/modified by selecting the  icon adjacent to the "Times" field, which can be accessed via MIDAS Admin Options → Manage MIDAS → Fields

Users can then be assigned to a particular duration/period list via MIDAS Admin Options → Manage Users & Permissions → [select user] → Times List (This option will only be present once one or more times lists have been created)



### Creating a new time list

- Go to MIDAS Admin Options → Manage MIDAS → Fields.
- Select the  icon adjacent to the "Times" field.
- In the small window that appears, click/tap the "Edit Time Lists" button at the bottom to open the time lists editor.
- Near the top-right of the editor, click/tap the  icon to enter a name for your new time list.
- Next, select whether you are creating a list of "Durations" or "Periods".
- If creating a list of durations, use the "Add New" field to enter your desired durations (in minutes), pressing Enter, clicking or tapping the adjacent  icon after each one. These will then appear in the "Durations" list above. Once you've entered all your durations, select "Save Changes".
- If creating a list of periods, enter the name of your first period in the top row, and first column of the blank periods table. Specify the Start and Finish times for this period in the adjacent columns. Repeat this process in subsequent rows to add the rest of your periods (if you use up all the empty rows, new ones will be automatically added to the end of the table). Once you have defined the names and times of all your periods, select "Save Changes".


## Modifying an existing time list

- Go to MIDAS Admin Options → Manage MIDAS → Fields.
- Select the  icon adjacent to the "Times" field.
- In the small window that appears, select the "Edit Time Lists" button at the bottom to open the time lists editor.
- Select the time list you wish to modify.
- If you wish to change the name of the selected list, use the  icon to enter a new name.
- Make the necessary changes to the existing time list then select "Save Changes".

## Deleting an existing time list

- Go to MIDAS Admin Options → Manage MIDAS → Fields.
- Select the  icon adjacent to the "Times" field.
- In the small window that appears, select the "Edit Time Lists" button at the bottom to open the time lists editor.
- Select the time list you wish to delete, and click/tap the adjacent  icon.
- Note: Any users currently set to use this deleted list (as well as your Public Web Request Form) will be reverted back to using standard Start and Finish times.

## Setting your check-in and check-out times

- Go to MIDAS Admin Options → Manage MIDAS → Fields.
- Select the  icon adjacent to the "Times" field.
- In the small window that appears, select the "Edit Time Lists" button at the bottom to open the time lists editor.
- Select "Nights" from the Time Selector drop-down.
- Make the necessary changes to your check-in and check-out times, and the maximum duration of booking allowed then select "Save Changes".

## Showing a time list on the Public Booking Request screen

- Go to MIDAS Admin Options → Manage MIDAS → Fields.
- In the "Web Requests" column for the "Times" field, select the time list you wish to appear on your public booking request form from the drop-down options.
- Select "Save Changes".
- To revert back to the standard Start and Finish time selector at any time, simply repeat the above process but select "Times" from the drop-down options.

## Replacing a user's Start & Finish time options with a time list or "Nights" option

- Go to MIDAS Admin Options → Manage Users & Permissions → [select user].
- Scroll down through the various permissions for the selected user until you reach the "Times Selector" option
- Select the time list that should be shown to the selected user in place of the standard Start & Finish time selector.

- Select "Save Changes".
- To revert the selected user back to a standard Start and Finish time selector, simply select "Times" from the Times Selector list and save changes.

## Managing Security Settings

### Password Settings

#### Minimum password length

All users will have to choose a password of at least this number of characters.

#### Force Password Change Every X Days

All users will be required to change their password every X days.

#### Offer to save credentials?

Give users the option to save their login credentials, language and theme selections in the browser they are currently using for the next time they access MIDAS.

#### Password Reset links are valid for

When a user initiates a password reset request, by default the reset link contained within the subsequent password reset email sent to them is only valid for 2 hours. If the user fails to click the link in their email to reset their password within this time frame, the link expires and the user would need to generate a new password reset request again. This setting allows you to change how long these emailed password reset links remain valid for.

#### Known Breached Passwords

If enabled, users will not be able to change their password to one which appears in any known public data breach and is therefore considered compromised. This option uses the 3rd party [Have I Been Pwned?](#) service. For more information, please see [this blog post](#).

#### Enable Two-Factor Authentication?




**Warning:** This feature relies on the ability for your MIDAS system to send email. Therefore, please ensure that you have configured the [email settings](#) and verified that you can successfully receive emails from your MIDAS system **before** enabling this feature, otherwise you and your users will be unable to login

Two-Factor Authentication requires all users to log in with an additional authorization code sent to their registered email address each time they log in with their regular MIDAS credentials.

This ensures that should a user's MIDAS credentials be exposed/compromised, their MIDAS account access remains secure, provided the attacker doesn't also have access to the user's email account.



**Important:** Two-Factor Authentication is only effective if users use a different password for MIDAS to the passwords they use to login to their email server/client

 Info: Two-Factor Authentication is disabled when [Single Sign-On](#) (Active Directory integration) is in use

## Session Control

### Inactivity forces logout after


Automatically logs out users if they have been idle for the defined period.

### Always force logout after

Automatically logs our users after a pre-defined length of time, regardless of their activity.

### Allow Multiple Logins By Users?

If selected, each user will be able to be logged in from multiple browsers/devices at the same time. If not selected, a user will only be able to be logged in from one browser/device at any one time (logging in from another browser/device will automatically logout the previous session).

 Please Note: The ability for user accounts to be logged in from multiple browsers/devices simultaneously is not available on systems licensed for a just single user account

## Max Invalid Login Attempts

To prevent unauthorized access and "brute force" attacks, your MIDAS can automatically "suspend" an account if a certain number of consecutive login attempts fail. Once an account becomes "suspended", the user who owns that account is sent an email containing a link allowing them to restore access to their account. Additionally, an administrator with sufficient privileges can "unlock" a suspended account via the Manage Users & Permissions.

## Device Control

### Alert users upon logins from unfamiliar devices

When enabled, whenever a user account is logged into from a new or unfamiliar device, an email notification will be sent to the account holder. The content of this notification may be customized via a [template](#).

## Allowed IP Range

For increased security, you can limit who can access the MIDAS login page, based upon their Internet IP address, irrespective of whether they have a valid login for MIDAS.

You can restrict access to a single IP address, or an IP range. This can be useful if MIDAS is hosted on a public web server, which potentially could be accessed by anyone worldwide. MIDAS' "**Allowed IP Range**" setting can be used to restrict access to users in your own country, organization, or to just you!

IPs are made up of a set of 4 numbers, each ranging from 0-255. These four numbers are each separated by a period (dot) character, and together form an IP address. For reference, MIDAS also displays your current IP address in the security screen.

By default, the "**Allowed IP Range**" setting in MIDAS is set to \*.\*.\*.\*

"\*" is a wildcard character, meaning that any value is acceptable. This will not restrict IPs, and will allow access from any IP.

You can change this to only allow access from a single IP, by entering the target IP in this box - If you only want to allow access for yourself, simply enter your IP here.

To restrict access to within your own organization / site, you could instead enter something along the lines of "192.168.\*.\*" - This would allow access to anyone with an IP starting "192.168", so "192.168.2.1" and "192.168.10.200" are examples of IPs that would be allowed.

Rather than use the "\*" wildcard character, which will allow any value in the range 0-255, you can instead further limit this to a range of values.

For example, entering [127-255] would only allow IP's that fell within the 127 to 255 values (inclusive).

Example: 172.16.10.[127-255] - Allowed IPs fall in the range 172.16.10.127 - 172.16.10.255



**Warning:** Proceed with extreme caution when restricting access to MIDAS based on an IP address/range - if you're not careful, you could lock yourself out of MIDAS completely!



**Warning:** If you are restricting access to a single IP address, such as your own, ensure that you have a static IP that will not change, and not a "dynamic" IP, which may periodically change, resulting in you being locked out of MIDAS



## SSL Access

If the server hosting MIDAS allows for secure (https://) connections, the SSL Access setting will allow you to encrypt your browser's connection to the server, reducing the risk of any data being intercepted during transit. Options are:

### Disabled

Force all users to connect to MIDAS via http://

### Enabled

Allow users to access MIDAS via either http:// or https://

### Forced

Force all users to connect to MIDAS via https:// (http:// connections will be replaced with https:// connections)



Warning: Do not "Force" MIDAS into SSL mode if your server doesn't accept secure https connections as you will lock yourself and others out of MIDAS completely! When you alter this setting, MIDAS will attempt to verify that secure https connections can be made to the server. If you select "Forced" and MIDAS cannot determine that your server accepts secure https connections, it will default down to "Enabled"

## Privacy

If the "Honor user's Do Not Track preference" option is selected and the user is using a web browser which supports the Do-Not-Track privacy setting, then MIDAS won't log the user's IP addresses in the [Recent Activity log](#) if the user has the "Do-Not-Track" setting enabled in their browser.

## Security Audit

Performs an "on-demand" audit on your current security settings. When run, a number of key metrics of your MIDAS system will be analyzed (including your database setup, MIDAS files, and recommended MIDAS settings) and a detailed report generated with appropriate suggestions and advisories for improving the overall security of your MIDAS system.



MIDAS Knowledge Base: [Tips for keeping your MIDAS secure](#)

## Managing Email Settings

This section contains a number of settings relating to email functions:

### Send outgoing emails using

Choose whether MIDAS should send email via the server's built in "Sendmail" program (if available), or via an external SMTP relay.

#### Sendmail

If "Sendmail" is selected, you must specify the location of where Sendmail resides on your server, for example `/usr/sbin/sendmail`

If Sendmail is not available on your server, you should choose the SMTP option instead for sending outgoing email from your MIDAS.

#### SMTP

If "SMTP" is selected, you will need to specify your organization's SMTP host (i.e. `smtp.yourdomain.com`).

Additionally, if your SMTP host requires a username/password for authentication, you can specify these credentials.

By default, connections to the specified SMTP server will be made on Port 25. To use a different port, append the port number to the end of your SMTP host (i.e. `smtp.yourdomain.com:port`)

If your SMTP server requires a SSL connection, select the SSL option. This will then attempt to securely connect to your SMTP server on Port 465. To use a different port, append the port number to the end of your SMTP host preceded by a colon character.

If your SMTP server requires a TLS connection, select the TLS option. This will then attempt to connect to your SMTP server on Port 586. Again, to use a different port, append the port number to the end of your SMTP host after a colon.

➔ MIDAS Knowledge Base: [I'm not receiving emails from my MIDAS](#)

### MIDAS Generated Emails Appear From

This is the email address from which any outgoing system initiated (as opposed to user initiated) e-mails will appear to be sent from.

For example, a password reset request, or notification of a submitted booking request would appear sent from this address. Whereas a booking confirmation or an emailed invoice would appear from the email address associated with the account of the user who confirmed the booking/emailed the invoice.

Whilst this doesn't have to be a real email address (i.e. you could use a generic `noreply@yourorganization.com` address for example), it does need to be a properly formatted email

address. If this email address is blank, or improperly formatted, MIDAS may be unable to send automated emails and/or they may be deemed as spam.

### Use this address for all outgoing email?

When this option is selected, all outgoing email from your MIDAS system will appear sent from the address specified in the "MIDAS Generated Emails Appear From" field above.

When this option is un-selected only system-initiated email notifications will appear sent from the address specified above (i.e. booking reminders, password reset requests, etc). All other user-initiated notifications will appear sent from the email address associated with the user account which performed the action (i.e. booking confirmations, invoices, etc).

Leaving this box unticked is recommended and is the default setting. If you have multiple user accounts setup in your MIDAS system, leaving this box unticked will help your clients know which particular user approved their booking requests, or added bookings for them, etc rather than all such notifications coming from a single generic email address.

### Reply To

Specify a "Reply To" email header to be included in all outgoing email. If specified, then when a recipient clicks reply on an email from your MIDAS system, their reply will be composed to the address specified here, which may be different from the address the email originated from.

For instance, you may have specified all outgoing email from your MIDAS system to be sent from a "no reply" address, but you can use the "Reply To" field to specify an alternate email address for recipients to contact with queries.

### BCC Outgoing Email

MIDAS provides the capability to have certain types of outgoing email from your MIDAS system automatically BCC'd (Blind Carbon Copied) to a predefined email address. This setting may be of use to administrators to keep track of outgoing e-mails, or for archiving purposes.


You can choose which types of emails are BCC'd to this address from the "Email types to BCC" list.

It is recommended however that you think very carefully as to which types of emails you select to be BCC'd, as for larger MIDAS systems this can result in a significantly higher volume of outgoing email traffic.

For this reason, the extended "Email types to BCC" options for "cloud-hosted" MIDAS system are only available if your MIDAS system is configured to send outgoing email via an external SMTP server/relay. If you have a cloud-hosted MIDAS system that is configured to send email via the internal "Sendmail" option, the extended BCC email options are not available, and only basic BCC capabilities (i.e. generated notifications are excluded from BCC'ing) are available. This restriction does not apply to self-hosted MIDAS systems.

## Attempt to reduce email volume by automatically combining similar emails?

If selected, MIDAS will attempt to collate multiple outgoing email notifications for any given client which are similar in nature. For example, if you were to "Bulk Reject" a series of booking requests, instead of each requestor being sent an individual email notification per booking request of theirs that's been rejected, MIDAS will combine all these notifications into a single email notification to the requestor.

 Please note: If your MIDAS is cloud-hosted and also configured to send outgoing email via the "Sendmail" option, MIDAS will always automatically attempt to combine similar emails where possible

## Send invoices in compatibility mode

Some mail clients don't yet support displaying modern email layouts. This can cause invoices emailed through your MIDAS system to display strangely for some recipients. You can resolve this by enabling this option. With this option enabled, MIDAS will send emailed invoices using traditional HTML tables rather than more modern CSS layouts.

 Blog Post: [Ensuring Email Compatibility With Older Mail Clients](#)

## Managing Print Settings

The Print settings allows you to control how MIDAS produces print outs.

### Sort By

When printing a list of bookings, by default the bookings are ordered by ascending start time. You can change this to instead sort printed booking lists by another booking field and/or in descending order instead.

### Split resources into categories

By default, when the "Resources" field is set to be included on printouts, all resources associated with a booking are printed in a single list. Enabling this setting will split the list of resources into categories (Equipment, Staffing, Consumables, etc) on printouts.

### Emergency Evacuation Data (Accuracy)

Sets a time (in Minutes) either side of the current time in which to include bookings when printing Emergency Evacuation data. For example, set to "0 minutes", an Emergency Evacuation printout will only include bookings actually taking place at that point in time. However, if set to "15 minutes", such printouts will also include any bookings that ended within the last 15 minutes, or that are due to start within the next 15 minutes.

### Emergency Evacuation Data should account for Setup / Breakdown times

This setting controls whether [Setup and Breakdown times](#) should be included when generating emergency evacuation data.

➔ See Also: [Emergency Evacuation Data](#)

## Managing Invoice Settings

Allows you to change various invoicing settings within MIDAS.

### Currency Symbol

Defines the currency symbol to use. (examples: \$, £, €)

### Currency Code

Defines the currency code to use (examples: USD, GBP, EUR)

### Default Tax Amount

The "tax" element (percentage) to be added to invoices by default.  
Setting this to "0" will not apply any tax by default to created invoices.



Tip: Setting "Default Tax Amount" blank (instead of "0") will hide the Tax line completely on subsequently created invoices (existing invoices with Tax elements will not be affected)

### Payment Terms

The number of days you allow your clients to pay their invoices from the date of invoice. This value can be used in conjunction with [Scheduled Tasks](#) to automatically send clients payment reminders / payment overdue notifications.

### Regular Invoice Prefix

Specifies a short "prefix" to add to the start of your incremental invoice numbers. For example, if set to "MIDAS" the first invoice generated/created will have the ID "MIDAS0001", the second "MIDAS0002" and so forth. You may wish to change this prefix each year, for example "MIDAS2014" will generate "MIDAS20140001", "MIDAS20140002", etc...

### Include in Invoice Notes

This setting allows you to include the contents of an additional booking field in the notes section of your generated invoices. For example, setting this to "Notes" will combine the booking notes of all bookings included on subsequently generated invoices. Ticking the additional "Itemize?" box would itemize these notes, associating each to its corresponding booking on the invoice.

### Create Invoices by Default?

When bookings are added to MIDAS a small "Create Invoice?" tick box is shown. If "Create Invoices by default" is selected, this tick box will always be ticked by default i.e. an invoice will be created for every booking, unless otherwise specified.

## Round up values?

If selected, when invoices are generated, MIDAS will automatically round up totals to their nearest whole unit.

## Show amounts excluding Tax?

If selected, charges indicated on the Booking Availability screen and line amounts on invoices will be shown exclusive of tax.

## Indicate charges on Booking Availability screen?

If selected, total venue/resource charges will be indicated on the Booking Availability screen for users with Invoicing permissions.

## Include zero value invoice items?

If selected, venues and resources for which there is no charge will still be included on invoices for completeness and/or if you need to denote that the client is getting something free of charge. If this option is not selected, items whose total charge is zero will not appear on generated invoices.

## Create invoices if invoice total is zero?

If unselected, MIDAS will only generate invoices where the invoice total is greater than zero. If selected, MIDAS will generate invoices regardless of invoice total.

## Automatically mark invoices totaling zero as paid?

If selected, then any invoice MIDAS generates that has a total of zero will automatically be marked as "Paid in Full".

## Prevent modification/deletion of bookings for which invoices have been created?

This setting will "protect" bookings, for which invoices have been created, from further modification or deletion. Such bookings can then only be modified/delete once their associated invoices have been deleted or until this setting is disabled. This setting applies to all users, meaning that when enabled, no user will be able to modify/delete such bookings.

## Prevent invoice deletion

This setting controls if and when invoices can be deleted, and has three possible values:

- Set to "**Never**", invoices can be deleted from the system at any time.
- Set to "**After sending, until paid in full**" will prevent invoices that have been sent (i.e. printed or emailed) from being deleted, until such time as the invoice has been paid in full. Invoices that have been created but not sent, or those paid in full, can still be deleted with this option selected.
- No invoices can be deleted from the system at all whilst the "**Always**" option is set.

## Setup / Breakdown Time Handling

These settings control how [Setup and Breakdown times](#) should be calculated and displayed on generated invoices. Four options are available:

- Invoices generated using Start / Finish times
- Invoices generated using Start / Finish times. Setup / Breakdown times displayed on invoice
- Invoices generated using Setup / Breakdown times. Start / Finish times displayed on invoice
- Invoices generated using Setup / Breakdown times. Setup / Breakdown times displayed on invoice

Take for example a booking from 10am - 11am, with a 30min setup and 30min breakdown period, in a venue with a rate of \$100/hour.

With this option set to "Invoices generated using Start / Finish times", the booking would be invoiced at a rate of \$100 (i.e. \$100/hour for 1 hour), and the booking times on the invoice will indicate 10am - 11am.

With this option set to "Invoices generated using Start / Finish times. Setup / Breakdown times displayed on invoice", the booking would be invoiced at a rate of \$100 (i.e. \$100/hour for 1 hour), but the booking times on the invoice will indicate 9.30am - 11.30am.

With this option set to "Invoices generated using Setup / Breakdown times. Start / Finish times displayed on invoice", the booking would be invoiced at a rate of \$200 (i.e. \$100/hour for 1 hour + 30min setup + 30min breakdown = 2 hours), but the booking times on the invoice will indicate 10am - 11am.

With this option set to "Invoices generated using Setup / Breakdown times. Setup / Breakdown times displayed on invoice", the booking would be invoiced at a rate of \$100 (i.e. \$100/hour for 1 hour + 30min setup + 30min breakdown = 2 hours), but the booking times on the invoice will indicate 9.30am - 11.30am.

## Apply Discounts To

This setting controls which elements of a booking a booking type discount should be applied to. You can choose to have booking type discounts applied to venue rates only, resource charges only, or both.

## Apply Discounts Silently

If you've set up discount rates depending upon the type of booking, when MIDAS generates invoices, it will apply this discount, and reference the fact that a particular discount has been applied. Enabling the "Apply Discounts Silently" option will still apply these discounts, but no reference to the fact that a discount has been applied will appear on your invoices.



## Deposit Invoices

If enabled, the Deposit Invoice settings instruct MIDAS to automatically generate separate deposit invoices (in addition to "regular") invoices.

This feature is useful if you normally charge your clients a "damage" or "security" deposit in advance of their bookings, or if you require "part payment" prior to their bookings taking place.

Here you can set how much should be charged on deposit invoices - be it either be a fixed amount, or invoiced as a percentage of the total cost of the venue & resource usage of the original booking(s).

The "Deposit Tax" field allows specifying a percentage amount of tax to apply to deposit invoices.

With the "Deduct deposit from regular invoice total" option enabled; the total of the deposit invoice will be deducted from the total amount on the "regular" invoice for the client's booking(s).

For example, with this option enabled; if a client's booking costs \$200 and you require a 20% deposit, the deposit invoice would be for \$40 (20% of \$200) and the regular invoice would be for \$160 (i.e. \$200 - \$40). The total payable by the client would be \$200 (\$40 + \$160).

Alternatively, with this option disabled, the same booking would produce a despot invoice for \$20 and a regular invoice for \$200. The total payable by the client would be \$240 (\$40 + \$200).

The "Deposit Invoice Prefix" setting, allows specifying a short "prefix" to add to the start of your incremental deposit invoice numbers. This prefix must be different to the Regular Invoice, Cancellation Invoice, and Credit Note prefix settings.

## Cancellation Invoices

The Cancellation Invoice settings instruct MIDAS to automatically generate invoices if a client's booking is cancelled (deleted) at short notice. You can set how close to the commencement of a booking (in hours or days) a cancellation invoice should be generated if a booking is then cancelled in that period. For example, a setting of "14 days" will mean that a cancellation invoice will be automatically created for any booking that is cancelled less than two weeks before it was due to commence.

You can then define what this late cancellation fee should be - it can either be a fixed amount, or charged as a percentage of the total cost of the venue & resource usage of the original booking that has been cancelled.

Furthermore, you can optionally have MIDAS automatically increase this fee if the booking is cancelled (deleted) at even shorter notice. For example, you could charge a 20% cancellation fee for bookings cancelled less than 28 in advance, and increase this to 50% for those cancelled less than 7 days in advance.

The "Cancellation Tax" field allows specifying a percentage amount of tax to apply to cancellation invoices.



The "Cancellation Invoice Prefix" setting, allows specifying a short "prefix" to add to the start of your incremental cancellation invoice numbers. This prefix must be different to the Regular Invoice, Deposit Invoice, and Credit Note prefix settings.

## Online Payments

MIDAS provides ability to allow your clients to pay online, invoices generated by your MIDAS system. If you have a [PayPal](#) and/or [Stripe](#) account, specify your account details in the "Online Payments" section to allow your clients to pay their invoices online using a major credit/debit card or PayPal account.

➔ See Also: [Configuring PayPal Integration](#) | [Configuring Stripe Integration](#)

## Client must enter their email address to access their invoice online

Setting this option will require clients to enter their Invoice Number, Invoice Date and their email address in order to view and pay their Invoice online. Unselected, clients will only need to enter their Invoice Number and Invoice Date.

If you email invoices to all your clients through MIDAS, you should consider selecting this option for increased security.

Clients without an email address on record within MIDAS will not be able to pay their invoices online if this option is selected. If you print off and post physical invoices to clients, and their email addresses are not present in MIDAS, you should consider de-selecting this option to allow your clients to pay their invoices online.

## Allow partial invoice payments?

If this setting is selected, then your clients can choose to make partial payments online against their invoices. If this setting is not enabled, then when clients go to pay their invoices online, they will only be able to pay them in full.

➔ See Also: [Online Payments](#)

## Credit Notes

The "Credit Note Prefix" setting, allows specifying a short "prefix" to add to the start of your incremental credit note numbers. This prefix must be different to the Regular, Deposit, and Cancellation invoice prefix settings.

## Managing Safety Settings

Allows you to control the Maximum Occupancy safety settings within MIDAS.

### Warn if the estimated total number of persons on site will exceed

Setting a number here will display a warning at time of booking if the estimated number of persons on site (including the booking you're making) will exceed this total. Your booking can still be made, as long as the maximum occupancy level is not exceeded (see below)

### Prevent further bookings if the estimated total number of persons on site will exceed

Setting a number here will display a warning at time of booking if the estimated number of persons on site (including the booking you're making) will exceed this total. No further bookings will be permitted during the period when your maximum occupancy level is estimated to be exceeded

### Show the estimated total number of persons on site when booking

If enabled, will display the estimated number of persons on site (including the booking you're making) on the "Check Availability" stage of adding/modifying bookings.

➔ See Also: [Emergency Evacuation Data](#)

## Managing Database Settings

This section contains a number of settings relating to the backing up of the database(s):

### Database Admin

This section contains a number of settings relating to multiple databases:

#### Show Database Selector on Login page

If this option is selected, and more than one database is defined, users will be prompted to choose which database they wish to login to and use from the login page.

#### Create New

Allows you to setup another MIDAS database, running in parallel, on your server - provided your existing MIDAS license allows. You may wish to have multiple databases running in parallel via the same interface if, for example, your business has multiple offices/site locations and you want to have a separate database for each. If your current license doesn't allow you to create any additional databases, please contact [sales@mid.as](mailto:sales@mid.as) to upgrade your license.

However, if your license is valid for creating additional databases, clicking/tapping this button will open a pop-up to allow you to setup your new database. You will need to give your new database a name, as well as setup the initial user(s). Options for the initial user are as follows:

- Transfer You & Your Permissions - This option will create the new database, and copy your login details from the current database to the new database.
- Transfer All Users & Permissions - This option will create the new database, and copy all users of the current database to the new database.
- Create new Admin User - Create a new database with a new administrative user. Selecting this option will prompt you for further details about the new user.

If your database is to be created on a different server to the current database, you will need to untick the "Use Current" Database Host option, and enter details for the new database server.

Use the "Show Advanced" options to control additional database creation options, including enabling table encryption and setting an encryption key ID.

#### Set as Default


Select a database from the database drop-down, then use this button to make it the "default" database. This database will be selected by default on the login page (Users may still change databases, provided the "Show Database Selector on Login page" is selected, otherwise the default database will be used)

#### Rename

Rename the selected database.

#### Delete

Remove the selected database.

 For safety, you cannot remove the database you are currently logged into - To remove the current database, you will need to logout, log into another database and delete from there

## Database Backups

### Current Backups

Lists all backups of your MIDAS database(s) currently stored on your server. The list shows the date & time of the backup, and the amount of disk space being taken up by the backup.

### Backup Now


Create an instant backup of the current database.

### Delete

Delete the selected database backup.

### Restore

Restore your MIDAS data from the selected backup. Selecting this button will open a window allowing you to selectively choose which parts of the database to restore (i.e. bookings between two dates, client, invoices, etc). Alternatively, you can select "Everything" to completely roll back MIDAS to the state it was in when the selected backup was taken.


 **Warning: Restoring a backup will overwrite any data added/modified in MIDAS since the date of the backup**


### Keep Server Backups

Controls how long MIDAS backups will remain on your server before being automatically deleted to conserve disk space. If the "Forever" option is present and selected, backups will remain on your server indefinitely, however you can still manually remove these backups at any time via the "Delete" button.

For additional piece of mind, if you enter your e-mail address in the "Email Backups To" field, MIDAS will automatically email a copy of the backup to that address every time it makes one.

Then, in the unfortunate event you lose data on your server, you can upload these backups to your MIDAS/BKUPS directory and restore them from within MIDAS.

 MIDAS automatically backs-up its database(s) upon the first login of each day, however MIDAS does not perform automatic backups on days where there are no logins, and therefore no new activity

 Database backups are usually very small in size, as they are compressed. Typically, each backup will usually be less than 500Kbytes in size!

 The "Forever" option is not available if your MIDAS system is "cloud hosted" by us

## Database Tools

This section contains a number of useful database management and optimization tools. These tools may be access via MIDAS Admin Options → Manage → MIDAS Database



**WARNING:** Some of the tools presented here are capable of permanently removing data from your MIDAS. These tools should only be used once you are fully familiar with their actions, and we strongly advise backing up your database before proceeding



**TIP:** These tools are only available to administrative users with the "Can Manage MIDAS" user permission, however for additional safety, you can remove or disable these tools completely be either removing the "dbtools.pl" file from your server, or blocking access to it

## Merge Booking Types

This tool allows you to combine two or more booking types into a single booking type, updating all existing bookings accordingly.

## Merge Clients

This tool allows you to combine the bookings & invoices from two or more clients into a single client. For example, is a user adds a new client named "Jo Blogs" and then another user adds the same client but spells it slightly differently as "Jo Bloggs" - these will be seen as two separate clients in MIDAS. The "Merge Clients" tool will allow you to combine these two clients into a single client.

## Merge Venues

This tool allows you to combine the bookings from two or more venues into a single venue.

## Remove Obsolete Bookings

This tool allows you to remove very old bookings held in your MIDAS, dating back several months or years. Whilst maintaining accurate booking records is important, many organizations don't need to keep track of bookings that took place more than a few years ago. This option allows you to choose to wipe bookings from your MIDAS that are more than either 6 months old, or older than 1-10 years.

Keeping your booking data trimmed by removing old booking data can also increase the performance of MIDAS.

## Remove Obsolete Invoices

This tool allows you to remove very old paid-in-full invoices from your MIDAS system, dating back several months or years. Whilst maintaining copies of invoices is important, many organizations don't need to indefinitely retain copies of invoices that were paid many years ago.

Removing old invoices can also increase the performance of MIDAS.

## Remove Inactive Clients


This tool allows you to "clean up" the client database by removing obsolete clients who haven't had a booking in MIDAS for a long time. You can choose to remove clients with no bookings in the last 6 months, or in the last 1-10 years.

## Remove Inactive Users

This tool allows you to "clean up" the user database by removing obsolete user accounts that haven't been logged into MIDAS for a long time. You can choose to remove users who haven't logged in within the last 6 months, or within the last 1-10 years.

## Reset Invoice Counter


Each time a new invoice is created in MIDAS, the invoice number counter automatically increments. For instance, if the first invoice created is "MIDAS0001", the next invoice will be "MIDAS0002" and so forth. Occasionally, you may wish to reset these counters back to 1. The "Reset invoice counter" tool allows you to do this for either the regular, deposit, or cancellation invoice or credit note counters.

 **Note:** In order to reset a counter, you will first need to change the corresponding invoice/credit note prefix, or alternatively remove all invoices/credit notes with the current prefix

## "Unfinalize" Invoices

Once an invoice has been printed or emailed to the client, MIDAS considers it to be "finalized", and locks its content from further modification. This is to ensure that what's been sent to your client matches the invoice held in your MIDAS system.

The "Unfinalize" Invoices tool allows you to remove this "lock" on a finalized invoice. However, it's important to note that "Unfinalizing" an invoice does not cancel, delete, recall, or revoke it. Instead, when you "Unfinalize" an invoice, its invoice date is removed, allow full editing of the invoice's content again.


 **WARNING:** Care should be taken when "unfinalizing" an invoice, as this may lead to discrepancies between the invoice previously sent to a client, and the current version of the same invoice held in your MIDAS system

## Change Primary User

By default, the initial user account that was created for your MIDAS at time of install is known as the "Primary User" account. This administrative account will always have access to "Manage MIDAS" and "Manage Users & Permissions" and also cannot be deleted.


The "Change Primary User" tool allows you to change which existing user should be considered to be the "Primary User".

## Optimize Database

 This tool is not available if your MIDAS is "cloud hosted" by us

This tool runs the "OPTIMIZE TABLE" MySQL command on your MIDAS database. This command effectively "de-fragments" your MIDAS database by reorganizing the physical storage of data. In doing so, it can reduce the amount of storage space and improve overall efficiency of your MIDAS database.

 Depending upon the size of your database, this may take several minutes to complete

 Tip: Another great way to further improve the efficiency of your MySQL server is to use a 3<sup>rd</sup> party tool like [MySQLTuner](#)

## Managing Templates

You can customize a variety of templates in MIDAS to suite your particular organization. Templates that can be customized (via MIDAS Admin Options → Manage MIDAS → Templates) include:

### e-mail: Miscellaneous

The default e-mail template allows you to customize the HTML for all emails sent via MIDAS, other than those listed below (which can be customized separately). MIDAS sends emails in both HTML and Plain Text formats, and so any HTML tags used will be stripped out of the template when sending in Plain Text format.

### e-mail: Booking Cancellation

This template allows you to customize the content of email notifications that may optionally be sent to clients when a user deletes their booking(s). You can further separately specify the subject line for such emails.

### e-mail: Booking Confirmation

This template allows you to customize the content of email notifications that may optionally be sent to clients when a booking is added for them by a MIDAS user. You can further separately specify the subject line for such emails.

### e-mail: Booking Feedback

This template allows you to customize the content of automated emails that may optionally be sent to clients following completion of their bookings. You can further separately specify the subject line for such emails.

### e-mail: Booking Reminder

This template allows you to customize the content of automated booking reminder emails that may optionally be sent to clients in advance of their bookings taking place. You can further separately specify the subject line for such emails.

## e-mail: Booking Request Approved

This template allows you to customize the content of email notifications that are sent to clients when a booking request they have made is approved by a MIDAS administrator. You can further separately specify the subject line for such emails.

## e-mail: Booking Request Approved (with changes)

This template allows you to customize the content of email notifications that are sent to clients when a booking request they have made has approved by a MIDAS administrator, but with some changes made that differ from the original request. You can further separately specify the subject line for such emails.

## e-mail: Booking Request Rejected

This template allows you to customize the content of email notifications that are sent to clients when a booking request they have made is rejected/denied by a MIDAS administrator. You can further separately specify the subject line for such emails.

## e-mail: Booking Request Submitted

This template allows you to customize the content of email notifications that are sent to clients when they submit a booking request. You can further separately specify the subject line for such emails.

## e-mail: Invoice Overdue

This template allows you to customize the content of automated email notifications that may optionally be sent to clients when an unpaid invoice is overdue. You can further separately specify the subject line for such emails.

## e-mail: Invoice Reminder

This template allows you to customize the content of automated email notifications that may optionally be sent to clients when an upcoming unpaid invoice is shortly due to be paid. You can further separately specify the subject line for such emails.

## e-mail: New Login

This template is used when the "Alert users upon logins from unfamiliar devices?" [security setting](#) is enabled. With this setting enabled, whenever a user account is logged into from a new or unfamiliar device, the user will be sent this automated notification.

## Invoice (Regular)

The "Invoice (Regular)" template allows you to customize the appearance of standard invoices generated or created within MIDAS. For example, you may wish to include a logo and your organization's address at the top of all your invoices, and payment terms at the bottom. This template applies to invoices shown on screen, in printouts, and in emails.

## Invoice (Deposit)

Similar to the "Invoice (Regular)" template, the "Invoice (Deposit)" template allows you to customize the appearance of deposit invoices.



## Invoice (Cancellation)

Similar to the "Invoice (Regular)" template, the "Invoice (Cancellation)" template allows you to customize the appearance of cancellation invoices generated when a booking is cancelled (deleted) at short notice.

## Invoice (Credit Note)

The "Credit Note" template allows you to customize the appearance of [Credit Notes](#).

## Online Payments

The "Online Payments" template controls the appearance of the online payment screen your clients can use to pay their invoices. You can further customize the appearance of these screens by specifying your own external .css style sheet in the corresponding field, which will then override the visual "theme" applied by MIDAS to these screens with your own styles.

## Print

The "Print" template controls the appearance of printouts generated by MIDAS.

## Receipt

The "Receipt" template allows you to customize the appearance of receipts which can be generated against paid/part paid invoices within MIDAS. Similar to the "Invoice" templates, the receipt template can contain much of the same information, and therefore you may wish your receipts to have a similar appearance to invoices. The receipt template applies to both printed and emailed receipts.

## Public: Web Requests

The "Public Web Requests" template allows you to customize the appearance of the Public Web Request screens of your MIDAS, from which non-MIDAS users can check availability of your venues and make booking requests. It's therefore a good idea to include useful information for your public visitors here, including contact information. You can further customize the appearance of these screens by specifying your own external .css style sheet in the corresponding field, which will then override the visual "theme" applied by MIDAS to these screens with your own styles.


## Public: Web Bookings

The "Public Web Bookings" template allows you to customize the appearance of the Public Web Booking screens of your MIDAS, from which non-MIDAS users can made bookings online. It's therefore a good idea to include useful information for your public bookers here, including contact information. You can further customize the appearance of these screens by specifying your own external .css style sheet in the corresponding field, which will then override the visual "theme" applied by MIDAS to these screens with your own styles.

➔ See Also: [Booking Requests](#) | [Manage Public Settings](#)

## Welcome Note

The "Welcome Note" template allows you to edit a message which will appear on your MIDAS login page, and be visible to all visitors who login to your MIDAS.

 You may use valid HTML code and inline CSS in your templates, however, <SCRIPT> and <STYLE> tags are not permitted

 MIDAS Knowledge Base: [What is HTML and how do I use it within my MIDAS templates?](#)

## Template Variables

Depending upon the template, the following dynamic variables may be inserted:

Variable	Description	Applies To Templates
<b>%ATTENDEES%</b>	The number of attendees	Email (All Booking-related templates)
<b>%BOOKING_COST%</b>	The cost of the booking	Email (All Booking-related templates)
<b>%BROWSER%</b>	The name of the user's browser	Email: New Login
<b>%BROWSER_VERSION%</b>	The user's browser version	Email: New Login
<b>%BUILD%</b>	Your MIDAS Build Number	All
<b>%BUILDDATE%</b>	The Build Date of your MIDAS	All
<b>%CLIENT%</b>	The full name of the client	Email (All Booking-related templates)
<b>%CLIENT_FIRSTNAME%</b>	The first name of the client	Email (All Booking-related templates)
<b>%CREDITDATE%</b>	Credit Note Date	Credit Note
<b>%CREDITNO%</b>	Credit Note Number	Credit Note
<b>%CREDITTO%</b>	Full details of the client the Credit Note is for (including organization, address, and email address)	Credit Note
<b>%CREDITTO_ADDRESS%</b>	Postal address of client the Credit Note is for	Credit Note
<b>%CREDITTO_CLIENT%</b>	Name of the client the Credit Note is for	Credit Note
<b>%CREDITTO_EMAIL%</b>	Email address of the client the Credit Note is for	Credit Note
<b>%CREDITO_ORG%</b>	Organization of the client the Credit Note is for	Credit Note
<b>%CUSTOM_X%</b>	A custom booking field's contents. For example, a custom field named "Test Field" would be accessible through the variable %CUSTOM_TEST_FIELD%, etc	Email (All Booking-related templates)

<b>%CONTENT%</b>	Main Generated Content	<i>Email (Miscellaneous), Invoice, Online Payments, Print, Web Requests</i>
<b>%DATABASE%</b>	Current MIDAS Database name	<i>Email, Invoice, Online Payments, Print, Web Requests</i>
<b>%DATETIME%</b>	Current Date & Time	<i>All</i>
<b>%FINISH%</b>	The finish date/time of the booking	<i>Email (All Booking-related templates)</i>
<b>%HEADING%</b>	Default Generated Heading	<i>Online Payments, Print, Web Requests</i>
<b>%INVOICEDATE%</b>	Invoice Date	<i>Invoice</i>
<b>%INVOICEDUEDATE%</b>	The date by which payment is due	<i>Email (Invoice Overdue/Reminder)</i>
<b>%INVOICEDUEIN%</b>	The number of days until payment is due	<i>Email (Invoice Reminder)</i>
<b>%INVOICENO%</b>	Invoice Number	<i>Invoice</i>
<b>%INVOICEOVERDUEBY%</b>	The number of days payment is overdue by	<i>Email (Invoice Overdue)</i>
<b>%INVOICETERMS%</b>	The number of days invoices should be paid within	<i>Email (Invoice Overdue/Reminder), Invoice</i>
<b>%INVOICETO%</b>	Full details of the client being invoiced (including organization, address, and email address)	<i>Invoice</i>
<b>%INVOICETO_ADDRESS%</b>	Postal address of client being invoiced	<i>Invoice</i>
<b>%INVOICETO_CLIENT%</b>	Name of the client being invoiced	<i>Invoice</i>
<b>%INVOICETO_EMAIL%</b>	Email address of the client being invoiced	<i>Invoice</i>
<b>%INVOICETO_ORG%</b>	Organization of the client being invoiced	<i>Invoice</i>
<b>%IP%</b>	The user's IP address	<i>Email: New Login</i>
<b>%LOGO%</b>	The MIDAS Logo	<i>All</i>
<b>%MYLOGO%</b>	Your custom/company logo	<i>All</i>
<b>%NOTES%</b>	Booking notes	<i>Email (All Booking-related templates)</i>
<b>%ORG%</b>	The name of the organization	<i>Email (All Booking-related templates)</i>
<b>%OS%</b>	The user's operating system	<i>Email: New Login</i>
<b>%PAIDON%</b>	The date the invoice was paid in full on	<i>Receipt</i>
<b>%POST_LENGTH%</b>	The length (in minutes) of any "breakdown" period following a booking's finish time	<i>Email (All Booking-related templates)</i>

<b>%POST_FINISH%</b>	The end date/time of any "breakdown" period following a booking's finish time	<i>Email (All Booking-related templates)</i>
<b>%PRE_LENGTH%</b>	The length (in minutes) of any "setup" period prior to a booking's start time	<i>Email (All Booking-related templates)</i>
<b>%PRE_START%</b>	The start date/time of any "setup" period prior to a booking's start time	<i>Email (All Booking-related templates)</i>
<b>%PRINTTYPE%</b>	Print Type	<i>Print</i>
<b>%REASON%</b>	The reason why the booking request has been rejected	<i>Email (Booking Request Rejected)</i>
<b>%REQUEST_DATE%</b>	The date/time the booking request was submitted	<i>Email (Booking Request Submitted/Approved/Rejected)</i>
<b>%RESOURCES%</b>	Resources assigned to the booking	<i>Email (All Booking-related templates)</i>
<b>%START%</b>	The start date/time of the booking	<i>Email (All Booking-related templates)</i>
<b>%THEME%</b>	The currently selected MIDAS Theme	<i>All</i>
<b>%TOTAL_COST%</b>	The total cost of all bookings listed	<i>Email (All Booking-related templates)</i>
<b>%UNSUBSCRIBEURL%</b>	The URL to use to unsubscribe from further notifications	<i>Email (Booking Reminder, Invoice Overdue/Reminder)</i>
<b>%USER%</b>	The full name of the user who initiated the action	<i>Email, Print</i>
<b>%URL%</b>	Your MIDAS URL	<i>All</i>
<b>%USER_FIRSTNAME%</b>	The first name of the user who initiated the action	<i>Email</i>
<b>%VENUE%</b>	The booked venue	<i>Email (All Booking-related templates)</i>
<b>%VERSION%</b>	Your MIDAS Version Number	<i>All</i>


## Notes about special variables:


- The %CONTENT% variable should be present in every template where it's applicable. This variable allows MIDAS to know where it should insert its generated content for that template. If this variable is omitted from templates requiring it, generated content will be inserted at the end of the template.

→ MIDAS Knowledge Base: [How to add your company/corporate logo](https://mid.as/help)

## Managing Public Settings

The following settings control the public "Web Request" and "Web Booking" interfaces for your MIDAS, allowing non-MIDAS users to check your room availability and make booking "requests" or actual bookings online.

 You can specify which of your venues are publicly requestable/bookable through the [Manage Venues](#) screen

 **Tip:** You can customize and add text/graphics, etc to your public "Web Request" and "Web Booking" screens through the use of [templates](#)

## Public Booking Requests

### Enable Public Booking Requests

Turn the public "Web Request" interface on or off.

### Bulk Approval Order

MIDAS allows administrative users to quickly approve all approvable booking requests. This setting controls the order in which booking requests are approved in such instances, as the order in which requests are approved may subsequently affect the availability of other booking requests.

Options are:

- **Earliest Requested First** - Booking requests will be approved in the order in which they were received, with the earliest received approved first
- **Latest Requested First** - Booking requests will be approved in the reverse order in which they were received, with the most recent received approved first
- **Earliest Commencing First** - Booking requests will be approved in the order in which the requested booking would start, with requests for the nearest start times approved first
- **Latest Commencing First** - Booking requests will be approved in the reverse order in which the requested booking would start, with requests for the furthest away start times approved first

### Auto-Approve Booking Requests

These options allow MIDAS to automatically approve booking requests (availability permitting) as soon as they are received, without requiring approval by an administrator first.

The available options are:

- **All** - All booking requests received will attempt to be automatically approved by MIDAS.
- **For these email addresses / domains** - Booking requests received from email addresses or email domains matching this field will attempt to be automatically approved by your MIDAS system. This field accepts a comma separated list of full or partial addresses or domains. For example, a value of *"hotmail.com,outlook.com"* would mean that any booking requests submitted under @hotmail.com or @outlook.com email addresses would be auto-approved. All other booking requests received would instead require manual approval from an appropriate venue manager.

- **For these booking types** – All booking requests received that match one of the selected booking types will be automatically approved.

## Public Web Booking

### Enable Public Web Booking

Turns the public "Web Booking" interface on or off.

### Payments must be completed within

Before an individual can complete their web booking, they need to pay for their booking. Prior to the payment stage, a temporary "tentative" booking is added for the individual, which is converted to a "confirmed" booking once payment has been made. If payment has not been made within the specified time frame (determined by this setting), then the tentative booking will be removed from the system and the individual would need to re-book.

### Automatically create invoices and mark them as paid

With this setting enabled, whenever an individual makes a web booking and associated payment, an invoice is automatically created and marked as paid for their payment.

## Shared Public Settings

The following settings affect both Public Requests and Public Bookings...

### Venue selection

This setting controls how individuals select a venue (or venues) to request/book.

Options are:

- **Individual/Manual** - The individual selects from a list of individually publicly accessible venues
- **Automatic/From Group** - The individual selects from a venue group, MIDAS then automatically selects a suitable publicly accessible venue from within the selected group

### Auto Venue Selection

(Only with Automatic/From Group venue selection)

This setting controls how MIDAS should select a suitable venue when automatic venue selection is in use.

Options are:

- **Random** – MIDAS will attempt to select an available venue at random from the all public venues within the selected venue group
- **Venue Order** – MIDAS will attempt to select the next available venue from the all public venues within the selected venue group, based on the order your venues are configured to appear within MIDAS
- **Least Used (Number of Bookings)** – MIDAS will attempt to select an available public venue from the selected venue group with the least number of existing bookings in it

- **Least Used (Venue Utilization)** – MIDAS will attempt to select an available public venue from the selected venue group with the most free time in it (i.e. the least utilized venue)

### Requests/Bookings must be made at least X days in advance

Prevent users from making last minute booking requests or public bookings by insisting that all requests/bookings are made in advance by a minimum number of days you specify.

### Requests/Bookings may not be made more than X days in advance

Prevent users from requesting/booking too far in advance by restricting the number of days ahead you will accept booking requests for.

### Requests/Bookings cannot be made past

Specify an absolute date past which booking requests and public bookings will not be allowed.

### Show on blocks

(Only with Individual/Manual venue selection)

When checking venue availability, if you don't want public to see who's already booked, set "Show on blocks" to "Unavailable". Public will then only see that a venue is unavailable, but won't see who's actually booked it. Alternatively, you may wish to display the name of the client, organization, or type of booking instead.

### Block color


(Only with Individual/Manual venue selection)

Change the appearance of booking blocks when public check your venue's availability.

### Show Hours of Operation

(Only with Individual/Manual venue selection)

If selected, a visual indication of each selected venues hours of operation will also be shown on the Web Request screen.

 **NOTE:** Requests will still not be permitted outside of a venue's operating hours regardless of this setting. This setting only controls whether hours of operation are indicated to requesters or not

### Show Venue Capacities

(Only with Individual/Manual venue selection)

If selected, the maximum capacity (occupancy level) for each venue will be indicated when selecting venues on the Web Request screen.

### Only allow public requests/bookings from these email domains

This option allows you to restrict public booking requests and public bookings to individuals with certain email addresses. For example, if you were to enter "yourdomain.com" in this field, public booking requests and/or public bookings can only be made by persons entering a "@yourdomain.com" email address. So, if you only wish to accept booking requests and/or public



bookings from people within your own organization, this setting can be used to filter out any third-party requests/bookings.



Tip: You can specify multiple allowed domains here in the form of a comma separated list. For instance, to only allow public requests/bookings from your own organization and hotmail accounts, you would enter "yourdomain.com,hotmail.com"

## Allow client record updates?

When a public web request/booking is made, MIDAS will attempt to match the person making the request/booking against an existing client in the database. With this setting enabled, if an existing matching client is found, then the client record will be updated with the new client details the requestor/booker has entered. With this setting disabled, if an existing matching client is found, existing details held in the database for that client will be used, and any changes the requestor/booker enters into client fields on the public web request/booking screen will be disregarded.

➔ MIDAS Knowledge Base: [Why are Public Web Booking/Requests disabled when I have enabled them?](#)

## Managing Scheduled Tasks

The Scheduled Tasks feature allows MIDAS to automatically send your clients reminders of their upcoming bookings, invoices, and more, based on a schedule you set.



In order for the Scheduled Tasks component of MIDAS to correctly function, you will need to setup a CRON job (or equivalent) on your server to execute the "cron.pl" file in your MIDAS installation once every per hour. The "Last Run" time provides an indication of when Scheduled Task were last run and can be used to verify your CRON job is running correctly. For more information on setting up your CRON, please refer to our Knowledge Base Article: [Configuring your server to run Scheduled Tasks](#)

💡 Tip: You can customize the content of these automated reminders/notifications through the use of [Templates](#)

💡 Tip: You can control which of these reminders individual clients receive by updating their "e-mail reminders" preference - See: [Modifying Clients](#)



## Bookings

### Before Bookings Commence


To have MIDAS send booking reminders to clients in advance of their bookings taking place, tick the "Send clients reminders of their upcoming bookings around X hours before they start" option, and set X to the number of hours before a booking starts that a reminder should be sent to a client.

For example, if X is set to "6", and a client's booking is due to start at 2.30pm, MIDAS will send them a reminder between 8am-9am the same morning (6 hours earlier).

### After Bookings Conclude

To have MIDAS send a post-booking email to your clients after their bookings have taken place (for instance, to thank them for their business or encourage them to visit again), tick the "Send clients a post-booking email around X hours after their bookings finish" option, and set X to the number of hours after a booking finishes that the email should be sent to a client.

For example, if X is set to "24", and a client's booking is due to finish at 2pm on a given day, MIDAS will send them a follow up email a day later at around 2pm (24 hours later).

 **Tip:** Post-booking emails can be used in conjunction with the optional "[Reviews](#)" addon, to automatically invite your customers to leave a rating/review on independent review platforms, such as Trustpilot.

## Invoices


By default, invoices created within MIDAS are not automatically sent to clients, and must be actioned by a user with sufficient privileges accordingly. However, with the "Send any unsent invoices" option selected on the Scheduled Tasks screen, once per day, MIDAS will check for any invoices that are unsent, and send them automatically to clients.

Once an invoice has been "sent" (by which we mean it has either been printed out/emailed to the client manually, or automatically emailed to the client through a scheduled task), MIDAS can then send an automated invoice reminder to the client prior to the date their invoices are due. To enable such reminders, tick the "Send payment reminders to clients X days before an unpaid invoice is due" option, and set X to the number of days before an unpaid invoice is due that a reminder should be sent to the client.

For example, if X is set to "5", and an unpaid invoice is due on 15 April, MIDAS will send the client a reminder of their unpaid invoice on 10 April.

To have MIDAS send a payment overdue notification to a client if their invoice hasn't been paid within the "Payment Terms" time frame (You'll find this setting on the Invoicing tab of the Manage MIDAS screen), tick the "Send payment overdue notifications to clients X days after an unpaid invoice was due" option, and set X to the number of days after an unpaid invoice was due that a notification should be sent to the client.

For example, if X is set to "5", and full payment for an invoice was due on or before 15 April, MIDAS will send the client a notification of their overdue invoice on 20 April.

 Tip: The "Run Daily Tasks Between" setting can be used to control during which hour of the day invoice reminders/overdue notifications should be sent

## Manage Miscellaneous Settings

The Scheduled Tasks feature allows MIDAS to automatically send your clients reminders of their upcoming bookings, invoice payment reminders, and invoice overdue notifications, based on a schedule you set.

### Enable links for phone numbers (Skype integration)


If enabled, phone/cell numbers displayed within MIDAS will become clickable/tappable (prefixed with `callto://`). If you have compatible software installed on your device, such as Skype, clicking/tapping these numbers within MIDAS will initiate a call to the corresponding number.

### Maximum Search Results To Display Per Page

Sets a limit on the number of search results to display per page when searching for clients/bookings, listing invoices, or viewing pending booking requests, etc.

### Maximum File Upload Size

If a custom "file" field has been defined (to allow attaching of files/documents to bookings), this setting controls the maximum size of file that users will be permitted to attach to bookings.

 File Uploads are only available in self-hosted editions of MIDAS


### Keep Temporary Logs For

Specifies for how many days MIDAS will keep logs, such as "Recent Activity", a record of "Deleted Bookings" (for restore), and certain "Statistics" etc. Higher settings will keep logs for longer, but will take up more server space, and may reduce performance. Note: This does not affect your actual bookings.


### Reference Booking Reminders sent as Calendar events back to UTC

By default, when a user sends a Booking Reminder to their external calendar, the times included in the calendar event match those booked in MIDAS. However, depending upon how your external calendar is configured and the time zone its running in, you may find that the times included in the emailed calendar event are offset. To fix this, enable the "Reference Booking Reminders sent as Calendar events back to UTC". MIDAS will then adjust times sent within calendar events back to UTC, based on your current time zone settings in MIDAS.

## Enable Debug Logging

 This option is only available in self-hosted editions

If debug logging is enabled, error messages generated by your MIDAS system will be logged to a file within your MIDAS installation.

 Debug logging should only be enabled if instructed by MIDAS support to troubleshoot a problem with your system

## Browser


MIDAS can notify users if their browser is obsolete (their browser version is less than the [minimum version supported](#) by MIDAS) or falls short of the recommended version to get the best experience out of MIDAS. If these options are selected, and the user's browser falls short of the minimum/recommended versions, a small bar will be displayed across the top of their MIDAS, prompting them to update their browser to the latest version.

## Checking for Updates

The "Check for Updates" button will check to see if there is a newer version of MIDAS available to you.

You can also set MIDAS to automatically check for available updates on a recurring schedule. This background automatic update check will only take place for those users with the user "Can Manage MIDAS" user permission, and if an update is detected, will prompt the user to confirm the update.

The "Update Channel" selector can be used to determine whether you receive "Release" updates or "Beta" updates. The default update channel is the "Release" channel. "Beta" updates may be unstable and are not recommended for live/production systems.

 The "Update" option is not present if your MIDAS is "cloud hosted" by, as your MIDAS system will be kept up-to-date automatically!

 See Also: [Latest Changelog](#)

# Manage Addons

The "Manage Addons" screen shows installed and available addons for your MIDAS, as well as any additional settings available for your installed addons.

- Selecting an installed addon will open the its corresponding settings page
- Selecting an available addon will take you to the addons site where you can find out more about the selected addon, and get it for your MIDAS
- "**Addons Ready to Install**" are addons which you have purchased, and which can now be installed to your MIDAS with a single click/tap.
- "**Addons Ready to Update**" are previously installed addons for which an update is available. You can quickly update the addon with a single click/tap.

➔ See Also: [Available Addons](#)

# Keyboard Shortcuts

MIDAS supports a number of Keyboard Shortcuts to facilitate quick access to key areas of the software.

Shortcut Key	Action
<b>a</b>	Recent Activity Log
<b>b</b>	Add Bookings
<b>e</b>	Print Emergency Evacuation Data
<b>f</b>	Select the View Filter
<b>h</b>	Open Help
<b>i</b>	Invoicing
<b>l</b>	Logout
<b>n</b>	Notification Center
<b>o</b>	MIDAS Admin Options
<b>p</b>	Print
<b>r</b>	Pending Booking Requests
<b>s</b>	Search
<b>t</b>	Statistics
<b>v</b>	Toggle between Day/Month View
<b>x</b>	Full Screen

The exact combination of keys you'll need to press in order to trigger these shortcuts varies between browsers and operating systems. For example, on current versions of Firefox, you can open the MIDAS help window by holding down Alt + Shift + **h**, whereas in Google Chrome, the combination is simply Alt + **h**. Please refer to your browser's documentation to determine the specific combination of keys to use to trigger these shortcuts in your browser.

## Other Sources of Support

➔ See Also: [Video Tutorials](#) | [MIDAS Knowledge Base](#)