



Full Contact Software

CLUB ADMINISTRATOR

The Complete club management tool that saves you time, money and increases retention.

- QUICK START GUIDE

The screenshot shows the Club Administrator software interface. The window title is "Club Administrator - Seido Karate - Grovedale - [Follow ups]". The menu bar includes File, Attendance, Student, Contact, Membership, Fees, Grades, Timetable, Stock, Finance, Reporting, Housekeeping, and Help. The toolbar contains various icons for navigation and actions. The main area displays a list of members with columns for ID, Name, Type, and Date. Two members are visible: Shane Mclean (ID 338, Type Fees, Date 01-Sep-06) and Kathryn O'Neill (ID 532, Type Contact, Date 25-Aug-06). Below the list, the "Additional Details for: Shane Mclean" section is expanded, showing fields for Style/Program (Seido Juku Karate), Active (Yes), Grade (6th Kyu Senior), Student Report, Student Notes, Student Comments (e-mail: cool1234@yahoo.com.au), View Student, Deactivate Student, Class/Week (0.09), and Last class (26 Jul 06). The status bar at the bottom indicates "Record: 1 of 2 (Filtered)".



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Installing software

Installing Club Administrator

1. *Installing Software*

- Software is compatible with Windows Vista, XP and 98.
- Software can be downloaded from www.fullcontact.com.au or is available on CD.
- Install main Club Administrator application first following the prompts from the installation program.
- If you wish to have students record their own attendance you will also need the class entry module, this can be installed on the same computer or another computer. This can be installed at a later date if required.
- If you will be using the Class Entry module to capture student attendance, install this as well.
- A font file 3of9barcode.ttf is placed in the installed folder, using control panel – fonts install this font to enable printing of barcodes.
- Two file pkzip.exe and pkunzip.exe are in the installed folder, copy these to the windows system folder “c:\windows\system32” to enable backups to run.

Upgrading from previous version

1. *Back up data*

- Club Administrator has a built in Backup function, ‘File’ – ‘Backup Database’ or you can use any other means to backup the file club.mdb that contains all your data.
- If you have any problems you can always recover as long as you have a backup of your data.

2. *Install Software and Upgrade*

- Install Club Administrator software following prompts.
- When you first open the software it will automatically apply any updates required (it may need to shutdown to finish applying changes).

Registering

When you initially install or upgrade you will have 28 days to register.

- You will be shown a registration screen when you start club administration (note: this is not displayed until you begin entering data), this contains a unique serial number that you must supply to receive an activation code.
- During the trail period just click cancel to use software (note: this screen may redisplay twice when first starting software).
- If you are connected to the internet select yes when prompted to email Full Contact Software the serial number. email: action@fullcontact.com.au .

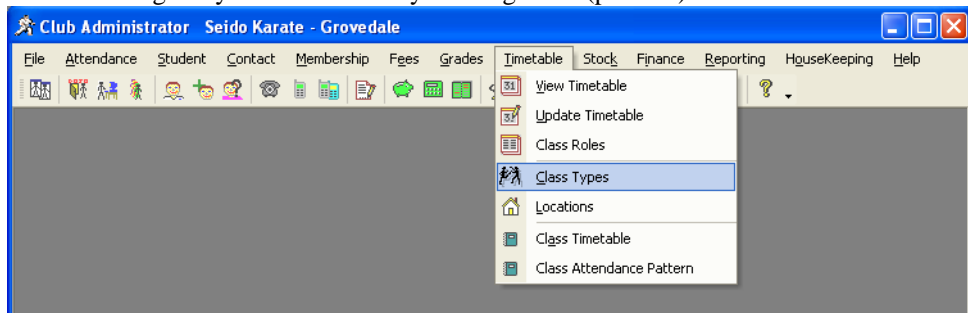


Navigating and using software

Club administrator is designed to be user friendly and easy to navigate and use. If you have used other software packages you should find this a breeze. For those of you who may be newer to computing here are some simple tips on how the software works.

Menu's

You enter data, view data and reports and perform other functions by first selecting the option you want. For example if you want to look at or set up the different class types that will be available for people to attend then you would click the timetable menu and go down until you see the **class types** option then click this as shown in the diagram. You can also access regularly used functions by clicking icons (pictures) on the tool bar.



Altering Dates



Where dates are entered you will see a small calendar button also. Clicking this button will display the select date screen, to simplify date selection.

Finding Students



Where you see this button on forms you can click it to bring up the select student window. This window will list students, to see student pictures click show pic's.

Adding and Deleting records

| Description | Sessions Credit | Sessions Payment |
|------------------------|-----------------|------------------|
| ▶ Advanced | 1 | 1 |
| ▶ Beginner | 1 | 1 |
| ▶ General | 1 | 1 |
| * <input type="text"/> | 1 | 1 |

Record: 1 of 3 (Filtered)

On the side of record lists you will see record selector squares. To delete a record click in the square, it will change colour, then press delete on the keyboard. To add a record go to the record with a * in the selector square and type the information in.



Importing Data

Prior to importing student details you should set up your initial configuration, including membership types, programs, grades and age groups (see next section). The following details how to load data from a file(s) or spreadsheet(s). If you have data in a database you should export it to a file so it can be loaded.

1. Go to “File-Import Students from file” in club administrator.
2. Select the format of the file you wish to load, it must be either a comma delimited file or a spreadsheet.
3. Locate the file to import data from.
4. In the Map Data tab select the appropriate fields to load the data from. You can omit any data you do not have. If your data is contained in several files you can load these separately but where part of the students record is in more than one file you must be able to like them by either student ID or name. To link by name check ‘Use Name as key to load file’.

| Field description | Field definition | Default Values | Sample Data | Data Load Conditions |
|------------------------|------------------|------------------------|-------------|--|
| Student ID: | StudentID | | 800 | <input type="checkbox"/> Use Name as key to load file. |
| Title: | Title | | Mr | |
| First Name: | Firstname | | Patrick | <input type="checkbox"/> Use age to determine group |
| Surname: | Surname | | Wig | |
| Sex (M/F): | Sex | M | M | |
| Date of birth: | DOB | 01-Jan-01 | 13/01/1964 | |
| Address: | | | | |
| Suburb / Town: | | | | |
| ZIP / Postcode: | | | | |
| State: | | | | |
| Phone Home: | | | | |
| Phone Work: | | | | |
| Phone Mobile: | | | | |
| email: | | | | |
| Membership Type: | Membership | Initial Load (not fou) | Cash 43 | Load as active if |
| Training Fee: | | | | Active |
| Training Fee Date: | | 01-Jan-10 | | equals |
| Annual Fee Date: | | 01-Jan-10 | | Yes |
| Add to Student: | | | | |
| Grade: | Grade | Beginner | 1st Kyu | <input checked="" type="checkbox"/> |
| Age Group: | | Senior | | |
| Classes Since Grading: | | | | |
| Date Graded: | GD | | | |

- a. **Student ID**, if you have an id number assigned to students then load in this field.
- b. **Names**, if you do not have first and surnames in a separate field you can put complete name in as firstname and leave surname blank, the load process will spit this into 2 parts. If you have the name stored in reverse order eg. surname firstname then put name in surname and leave firstname blank.
- c. **Sex / Date of Birth**, these must be loaded in the system, if you do not have this information for all students set a default value and this will be loaded against students where it is missing.



- d. **Membership details**, all students will be assigned a membership type, if you wish to load all students with the same membership type initially set this up in Club Administrator Member Types then select this membership as the default value. Alternately if you have different membership types in your records eg. Child, Adult, Concession etc. then you should set these up, making sure that the description in Club Administrator matches that in your file perfectly. If you will be loading all to one membership type you may want to call it something like ‘Initial Load’. If you have different payment amounts that members may be paying then specify this amount in training fee and this will override the standard amount for a membership type. You can load members as active or inactive or can make this conditional on a field in the file being loaded.
 - e. **Family Memberships**, if you have memberships where more than one student are associated with the same payment then these can be loaded to the same membership. The paying students number needs to be specified in the ‘Add to Student ID’ field when initially loading other family members.
 - f. **Grades**, only one style / program can be loaded in one load. You must set up this style in club administrator along with any grades and age group information you will be loading prior to loading it. To load a member against a style they must have an age group and grade assigned so select a default value for these to be used where none is found in the file. You must also make sure that your descriptions match those in club administrator exactly.
 - g. **Grade / Promotion history**, you can load promotion history with this load process. To do this grades must be loaded in the order they were obtained. The following is an example of a file that could be used to load past promotions. Most recent grade must be last one loaded. If a column is added with number of classes since grading this figure will be loaded against each promotion also.
- | StudentID | Obtained | Grade |
|-----------|-----------|---------|
| 901 | 1/02/2009 | 4th Kyu |
| 901 | 1/07/2009 | 3rd Kyu |
| 901 | 1/10/2009 | 2nd Kyu |
| 901 | 1/01/2010 | 1st Kyu |
- h. **Multiple styles**, If you have data for more than one style you must load these separately, additional Style / Program files would only need to contain the student number and the Style / Program information.

A preview of the data to be loaded is displayed in the Sample Data column so you can check that these have been correctly mapped.

- 5. Select any custom data fields you wish to load and map where the data loads from.
- 6. Click load data and all data will be loaded.



Initial set up of data

Some sample configuration data is entered in the database ready for you to use. You can immediately start adding students, recording attendance and experimenting to see how the software functions. Alternately you can go through and set up the configuration data to meet your requirements.

General Options

- **Tax Options**

When you first install the software the Tax Options are on and a default Tax of 10% is set. If you are not going to be recording Goods and Services Taxes or if the amount is different to 10% then you should update this setting now. Go to the File menu and select **options**, Then the Tax tab and enter the correct configuration.

- **Other Options**

You will see many other tabs in the options screen, you can set up these options now if you wish or do so later at any time.

- **School details**

To display your schools name and details in various places, go to the File menu and select **Club Details**. Enter your school name and address, then select the Club Logo tab to load your club logo so this can be displayed also.

Membership types

Go to the Membership menu and select **Member Types**. You set up membership types that you can then assign to students as they are entered. Several sample membership types are already set up when you initially install the software.

Membership Maintenance. Changes to fees will take effect immediately, new fees being charged to students as fees become due or new contract entered into.

| Description | Annual Fee | Ann. Tax% | Training Fees | Fee Tax% | Training Fee Period | Period Contract | Contract Number | External collection | Free Gradings | Classes each period | Number in use |
|---------------------------|------------|-----------|---------------|----------|---------------------|-------------------------------------|-----------------|-------------------------------------|---------------|---------------------|-------------------------------------|
| Eg. External Collection | \$30.00 | 10. | \$50.00 | 10. | Fortnightly | <input type="checkbox"/> | | <input checked="" type="checkbox"/> | | | |
| Eg. Fortnightly Fee | \$30.00 | 10. | \$50.00 | 10. | Fortnightly | <input type="checkbox"/> | | <input type="checkbox"/> | | | |
| Eg. Max 10 class per mont | \$0.00 | 10. | \$40.00 | 10. | Monthly | <input checked="" type="checkbox"/> | 6 | <input checked="" type="checkbox"/> | | 10 | <input checked="" type="checkbox"/> |
| Eg. Multi class pass | \$0.00 | 10. | \$75.00 | 10. | Yearly | <input type="checkbox"/> | | <input type="checkbox"/> | | 10 | <input type="checkbox"/> |
| Eg. Sessional | \$30.00 | 10. | \$7.50 | 10. | Sessional | <input type="checkbox"/> | | <input type="checkbox"/> | | | |
| Eg. Term Contract | \$30.00 | 10. | \$50.00 | 10. | Monthly | <input checked="" type="checkbox"/> | 6 | <input checked="" type="checkbox"/> | | | |
| Eg. Yearly | \$30.00 | 10. | \$600.00 | 10. | Yearly | <input type="checkbox"/> | | <input type="checkbox"/> | | | |

Record: 8 of 8

There are several types of membership supported. Use as many of these as you require.

Annual Fees: Enter the amount for annual fee in ‘Annual Fee’

Annual membership fees are available to be used in conjunction with all other fee types, this is for recording an annually occurring fee (can be used for insurance).



Training Fees: The amount entered in this column will be the recurring training fee amount. It will fall due at the period stated in the Training Fee Period. If this is set to sessional then it will fall due every time a student attends class.

Period Contract: If the membership is to be a fixed term, normally 6 or 12 monthly then check this box and enter the number of contract payments in the following field. If the membership has a minimum period, eg, 6 payments then do not check this box.

External Collection: Check this box if membership fees will be collected by an external company or by a automated collection system. This also includes if you are going to put through credit card transactions on a bulk basis.

Free Gradings: Select this if membership type entitles students to free promotions.

Classes: This field is used to limit the number of classes a student can attend. If they are only permitted to attend 10 classes per month enter 10 in this field, set membership to monthly and check Expire classes each period. Classes can also be used for multi class passes where a student pays for a number of classes, in this case do not check expire classes each period, the training period will be show the length of time until the multi-class pass expires.

Styles & Programs (professional version only)

Go to the Grades menu and select **Styles & Programs** to set up multiple styles and programs. If the style you are setting up will have different grades or levels check the multi level option.

Grades & Levels

Go to the Grades menu and select **Grades & Levels** to set up Grades and levels for each program. Select the program in the Select Style Program box then enter it's levels.



Grades + Levels

Select Style / Program: Seido Karate

NOTE: Numbers order must correspond to grade order.

Requirements to go for next Grade

| Number | Description | Time(weeks) | Classes | Cost | Limit to age group | Current Students with Grade | Number Promotion records | Certificate number required |
|--------|-------------|-------------|---------|---------|--------------------|-----------------------------|--------------------------|-----------------------------|
| 10 | Beginner | 8 | 20 | \$0.00 | All | | 1 | <input type="checkbox"/> |
| 20 | 9th Kyu | 8 | 20 | \$25.00 | All | | | <input type="checkbox"/> |
| 170 | 7th Dan | 0 | 0 | \$0.00 | All | | | <input type="checkbox"/> |
| 15 | Beg Adv 1 | 4 | 8 | \$10.00 | Tigers | | | <input type="checkbox"/> |
| 17 | Beg Adv 2 | 4 | 8 | \$10.00 | Tigers | | | <input type="checkbox"/> |
| 19 | Beg Adv 3 | 4 | 8 | \$10.00 | Tigers | | | <input type="checkbox"/> |
| * | 0 | 0 | 0 | \$0.00 | All | | | <input type="checkbox"/> |

Re-Sort

Record: 20 of 20 (Filtered)

For each style or program you set up there will be a default level of Beginner set up automatically, this level can not be removed however you can update the description if you need to.

Number: number will determine the order of grades (maximum 255).

Classes: is used to check if student has completed enough classes to grade.

Cost: This is the cost to grade to this level.

Limit to age group: if you are using multiple age groups you can have grades restricted to one age group or open to all age groups.

Certificate number required: a unique certificate number will be assigned each time a student grades.

Age Groups

Go to the Grades menu and select **Age Groups** to set up multiple age groups. If you are operating children’s programs then this will enable you to separate and manage different age groups, keeping separate statistics and information for each group.

Class Types

Go to the Timetable menu and select **Class Types** then enter in the various class types for each style or program. This enables you to track attendance in different class types. When setting up class types the Session Credit column will determine the session credit given for attending this type of class. If you set up a camp class type and you want students to be credited 5 classes for attending you should enter 5 in this column. The session payment column is used primarily for determining payment amount with sessional memberships. The training fee will be multiplied by this figure when requesting payment for attending a class.



Locations

Go to the Timetable menu and select **Locations**. When using the class entry module locations are used to limit the display to the selected location. This is useful to track classes when operating in multiple locations.

Custom Data

Go to the Housekeeping menu and select **Customize**. Custom data fields are available for you to set up for both leads and students. You can set up as many fields as you like to record different data about leads and students.

From the screen list select the screen you would like to add custom data for. Any fields set up for this screen will then be displayed. Note you should only use this screen when no other screens are open.

When clicking **Add New Field** sets up a new item based on entered parameters:

- **Numeric Field ID:** this number will determine the order in the list.
- **Field Display Type:** A text box is a standard entry field, A Combo list provides a drop down list and a check box is ticked yes or no only.
- You must then enter the data type: Integer is a whole number only; Double precision caters for decimals; Currency will display based on regional currency settings; Date is for dates only; finally a string is a text entry, if you enter a number of 5 there will be a 5 character field created. The maximum field length is 255 Characters.



Screen: Student details

Field:

| | |
|---|------------------------------|
| 1 | Found out about club through |
| 2 | Belt Size |
| 3 | Parents names |
| 4 | Medical note 1 |
| 5 | Medical note 2 |
| 7 | Joined for 1 |
| 8 | Joined for 2 |
| 9 | Occupation |

Add New Field Delete Field

Field ID: 1

Field Type: Combo Box String (200)

Field Width: 100 % maximum width

Caption: Found out about club through

Help tip: Select reason from list or enter new

Control Format:

Sample / Test display

Found out about club through

Belt Size

Parents names

Medical note 1

Medical note 2

Joined for 1

Joined for 2

Occupation

Past Experience

Years Experience

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Once this is done and new field is created you can enter the description, width and help tip in the entry boxes provided. The control format can be specified for dates, such as 'long date', 'medium date' or for those familiar with format masks in Visual Basic any suitable format can be entered (if you're not sure ignore this option).

To remove a field simply select it from the **Field** list and click Delete Field.

Note: do not open any other screens or reports while you are using this screen, doing so may cause the software to fail to create these.



Students

Add Students

Go to the Student menu and select **Add Student**.

Enter Student details. You must enter a Name, Sex and DOB for every student then select a membership type. In the initial Training Details you must select a style or program for the student, if they will be doing multiple styles you can add them later. The start date to enter is the date the new student will be paying fees. For existing students do not use the day they started training, otherwise it will prompt you to collect fees from then. You can enter their actual start date later, along with their promotion history if you decide to.

Family Memberships: If you have family memberships where one person pays for multiple members then you can attach them all to the one membership (you will need to set up family membership types with the total fees that need to be payed). To do this click the Add to existing button then select the person from the list whose membership you wish to add them to. If you have created a student and not done this, you will need to deactivate them and activate them, when you activate them you will now have this option. The **Activate Student** and **Deactivate Student** screens are also under the student menu.



Manage Student details

View Student Details
✕

Student Details

Student ID: Current Student

Name:

Sex:

DOB:
Age 26

Address:

Phone Home:
Work:
Mobile:

e-mail:

Comments:

Message:

Start Date:

Membership + Training details
Custom details

Membership Details

Payee Name:

Member Type:

Training Fee: Due:

Training Details

| Style / Program | Active | Grade: |
|-------------------|--------|------------------------|
| Seido Juku Karate | Yes | Beginner Senior |
| | | Obtained: 24-Sep-06 |

Incentives

Class/Week: Last class:

Card not printed

The **view student** screen is one of the most useful in the whole system, from this screen you can perform almost all functions related to a student. To get to this screen go to the Student menu and select View Student, Click on the face icon or if you are in any screen that has the Student status display (the green bar with 'Current Student' shown above), double click on this and it will open the View Student screen.

Student Pictures: There are several ways to manage student pictures. If you click in the box 'click to insert student picture' you will be prompted 'Insert Picture':

1. Click 'no' then press shift + insert and paste a picture you previously copied to the clip board.
2. On the options screen (See General Options) is a 'Student Pics' tab. If you have the 'Use Microsoft Photo editor' option checked clicking yes opens Microsoft photo editor to manage your pictures (note: this comes with Microsoft office though it is no longer available in Office 2003).
3. If you don't have Photo Editor then do not check this option, instead you will be prompted for the document type you should choose 'Bitmap Image' or another appropriate image type.

SMS: Click the phone icon to initiate an SMS to this student.

Email: Double click on the email address to open an email to this student.



Comments: comments field contains general details you wish to be able to readily see for student.

Message: Anything entered here will be displayed in the class entry module before student is shown classes to attend.

Custom Details: Click the Custom details tab to view or enter custom fields.

Training details: If you are using the professional version use the add, stop and delete buttons to add and remove training programs a student is enrolled in.

Other functions: the buttons on the right all perform described functions.

Contact Students

Go to the Contact menu and select **Contact Manager** or **Follow up notes** (not shown).

The contact manager and follow up notes screen give you access to all your students details and records from one place, while presenting their phone and email details to make contacting them simple.

At the top of the contact manager are criteria you can use to limit the students displayed, when this first opens it shows students who have not attended for 2 weeks. Where columns have clickable buttons this will sort the data.

Follow up notes screen has the same functions but it only displays students with follow up notes against their name. To create a follow up note go to the view student screen or contact manager and click Student notes. Put in a follow up date and it will appear on the follow up notes screen when it's due. Due follow up notes will be displayed when you first open Club Administrator to remind you action is required.



Fees

The fees a student is due to pay are determined by their membership type. When initially setting the system up with existing students it's important to get all the due dates for fees correct. Use the **Update Membership** screen under the membership menu to do this.

Internally collected

To receive student fees select **Receive Fees** from the Fees menu.

Receive training fees

Student Details

Student ID: Current Student

Name:

Comments:

Message:

Payments Due

| | Affiliation | Annual | Training | Total |
|------------------|-------------|--------|----------------|---------|
| Over Due | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Within 14 days | \$0.00 | \$0.00 | \$43.00 | \$43.00 |
| Total Due | | | \$43.00 | |

Membership Details

Payee Name:

Member Type:

| | Fee | Due |
|----------|---|-----------|
| Training | 43 Fortnightly | 11-Oct-06 |

Style / Program:

Affiliation: Three Year

Payment Details

Payment Date:

| | Payment | Next Due |
|-----------------------|--------------------------------------|--|
| Training Fee: | <input type="text" value="\$43.00"/> | <input type="text" value="25-Oct-06"/> |
| Affiliation Fee: | <input type="text" value="\$0.00"/> | <input type="text" value="05-Aug-09"/> |
| Total: \$43.00 | | |

This screen will automatically show payments that are overdue or due within 14 days. You can update the payment and due date details clicking process payment. If you enter a payment and then discover it was entered incorrectly for some reason, simply enter it again but change the amount to negative (eg. If the above was processed to reverse you would enter -\$43.00 and click process payment again).

Affiliation Fees

To set up affiliation fees select the **Affiliation fee** option from the Membership menu. This screen gives you all the options for managing affiliation fees. You can set up different affiliation fees for all your programs if required. There are two ways affiliation



fees can work. Select the Affiliation Types tab on this screen to set up affiliation types. You will see a check box, Pay by Club this determine how affiliation fees will be handled. They can either be paid by the club, in this scenario the student may not even be aware of them, the club pays for the student. Alternately they are paid by the student and will appear as another fee students pay. If affiliation fees are paid by the student they are received in the Receive fees screen. If they are paid by the club the are collected in this screen also, click Club report and update tab to access these functions.

External fees

For students on external fees you are able to set up and manage agreements within club administrator. To set up agreements select the **Agreement Management** screen on the memberships menu.

The screenshot shows the 'Agreement management' window. It is divided into several sections:

- Select Agreement:** A dropdown menu for 'Student Name' (Josh Wylie) and 'Student No.' (30). Below is a table of 'Agreements' with columns for ID, type, and date.

| | | |
|-----|-------|-----------|
| 324 | up-et | 29-Sep-06 |
| 182 | up-re | 09-Oct-05 |
| 181 | up-re | 09-Oct-05 |
| 9 | up-re | 13-Mar-04 |
| 4 | ag-rp | 12-Oct-03 |
- Student details:** Fields for Student (30 - Josh Wylie), Ph. Home (52632502), Work (52632278), and Address (28 Golf Links Rd, Anglesea Vic 3230). Includes an 'Alter Student' button.
- Agreement details:** 'Collection Agency' dropdown (Pay Smart), 'Agreement' field (324), 'amendment to' field (182), 'Status' dropdown (Update Entry), 'Created' date (29-Sep-06 12:12), and 'Start date' (25-Aug-06). Includes 'Alter Membership' and 'Alter Payments' buttons.
- Payment details:** Radio buttons for 'Credit Card' and 'Direct Debit'. Fields for 'Card Type' (Visa), 'Name on Card' (Jennifer Wylie), 'Credit Card Number' (4940 1243 7809 1245), and 'Expiry Date' (11/09 mm/yy).
- Print Agreement:** Buttons for 'Current Agreement', 'Blank Agreement', 'Blank Suspension', and 'Blank Cancellation'.
- Perform Action:** A row of buttons: 'New Agreement', 'Update Agreement', 'Suspend Agreement', 'Cancel Agreement', 'Approve Agreement', and 'Delete Entry'.

Here you can set up all details associated with the agreement, including cancellations and suspensions. You can print agreements either with students details or blank, allowing you to have students complete details and enter them at a later time. Note: membership and fee details are not fixed by the agreement so if you change these then they when you are receiving fees they may not match the agreement.

If you have external fees and are using multiple collection agencies or changing from one agency to another you will need to set up these agencies in the **Collection Agencies** screen under the membership menu.



Collection Agencies

Default Agency: Pysmart

| ID | Collection Agency | Payments File Format | Field description | Field definition |
|----|-------------------|---|--|---|
| 1 | Pysmart | <input type="radio"/> No File <input checked="" type="radio"/> First line of file contains Field names. <input type="radio"/> First line of file contains First record. <input type="radio"/> First line of file contains Header summary data. | Reference ID for student: Payment received: Surname of student: First Name of student: Date Payment received due: Remaining Payment(s) value: | [Reference] [This Period] [Surname] [First Name] |
| 2 | EziDebit | <input type="radio"/> No File <input type="radio"/> First line of file contains Field names. <input checked="" type="radio"/> First line of file contains First record. <input type="radio"/> First line of file contains Header summary data. | Reference ID for student: Payment received: Surname of student: First Name of student: Date Payment received due: Remaining Payment(s) value: | [F3] [F5] |

Record: 1 of 2

Most of this screen is related to receiving files from these agencies, above are the format configuration for 2 commonly used companies.

If memberships are flagged for external collection you have several ways these can be managed and processed.

Manual Statement entry

This is the simplest method. When you receive a statement of what has been collected from the external company open the **Receive External Payments** screen under the Fees menu.

EXTERNALLY Received Contract Payments

Hide Contracts with no payments

Show fees due before: 29-Sep-06

Collection Agency: All

Show individual payment details

| Date Due | ID | Name | Received Entry Box | Payment | Remaining Due | Payments To Go |
|-----------|-----|--------------------|--------------------|---------|---------------|----------------|
| 29-Sep-06 | 538 | Damian Bennett | | \$38.00 | \$38.00 | Fortnightly |
| 29-Sep-06 | 514 | Jason Bifano | | \$73.00 | \$73.00 | Fortnightly |
| 25-Aug-06 | 421 | Robyn Boreham-Hill | | | \$38.00 | Fortnightly |
| 29-Sep-06 | 546 | Kelsey Buchanan | | \$33.00 | \$33.00 | Fortnightly |
| 24-Aug-06 | 309 | Jeremy Carruthers | 55 | | \$55.00 | Monthly |
| 11-Aug-06 | 408 | Caleb Casey | | | \$28.00 | Fortnightly |

TOTAL: \$144.00

PROCESS: Payments + Part Payments

REPORT: Prev payments Current entries

Record: 5 of 70 (Filtered)

All students on external memberships will appear sorted in alphabetical order, simply enter in all amounts received and click process payments. If you click the + Part Payments button it will finalize payments where the full amount was not received. Doing this is only



recommended where no more payments will be received from a student and they still have a partly outstanding amount.

If you discover an error after you have processed an external receipt there are two functions under the fees menu to fix these:

- **Combine External Receipt** – allows you to process additional transactions and add them to receipt.
- **Remove external payment** – lets you select transactions on the receipt and remove them.

MOTO Transaction entry

Another option used by some people is to process credit card payments themselves, usually as MOTO (mail or telephone order transactions). To do this use the **Bulk Payment receipt** function of the Fees menu. This screen works identical to the Receive External payments screen except:

- It displays bank or credit card details to facilitate easy entry and processing of these.
- For each record entered it creates an individual receipt. This is done so that if the transactions are being entered through an EFTPOS terminal that is used for other transactions as well (as is normally the case), you will still be able to balance the terminal receipts against Club Administrator transactions for that same period.

File upload

Uploading a file of payments received is by far the most efficient and accurate way of processing external payments. To load files select the **Process Payments File** option from the fees menu.

The 2 critical pieces of information required for this:

- The Amount being received.
- A reference number, this determines which membership payments will be applied to. There are 2 ways to assign reference numbers, you can go to the update membership screen and enter it in the External Reference Number box. Alternately when you process a file and a reference number is detected that has not been assigned you will be prompted with a list of students and can then select the correct student to assign it to.

The file upload creates an external receipt identical to those created with Manual Statement entry. You use the functions for correcting errors with these to correct any problems with files received.



Classes

Timetable

You can add and update existing classes through the timetable menu ‘Update timetable’ option. When setting up classes use age groups and level requirements to only have classes displayed to students eligible to attend them.

If you wish to limit classes to specific students you can use the **class role** function under the timetable menu to achieve this. When using the attendance entry screen this allows you to record required payments for all students not in class.

Attendance Entry

Go to the Attendance menu and select **Attendance Entry**.

Attendance Entry

Todays date: 26-Sep-06
 Class date: 25-Sep-06 Monday
 Location: Main Dojo

| TIME | CLASS |
|----------|-----------------------|
| 12:30 PM | Beginner |
| 12:30 PM | Combined Graded |
| 4:10 PM | 4-7 Dragons |
| 4:45 PM | 4-7 Dragons |
| 5:30 PM | Junior |
| 6:15 PM | Black Belt Class |
| 6:15 PM | Beginner |
| 7:00 PM | Green / Brown / Black |
| 7:45 PM | Blue / Yellow |
| 8:35 PM | Meditation |

Attendance Entry

Student No: 398
 Student Name: Mietta Scarlett
 Rank: 7th Kyu Junior
 Age: 6
 Sex: Female

View Attendance
 Add to Class Remove from Class

Student Mietta Scarlett in Class.

INSTRUCTORS
 Malcolm Ayles
 Cassie Ayles
 Lisa Robinson
 Alter Instructors

| Name | Rank | StudentID |
|-------------------|---------|-----------|
| Micky Robinson | 3rd Kyu | 154 |
| India Robinson | 5th Kyu | 296 |
| Jeremy Carruthers | 5th Kyu | 309 |
| Ned Gude | 5th Kyu | 310 |
| Jack Clark | 5th Kyu | 335 |
| Jordan Kellett | 5th Kyu | 376 |
| Kendra Schmid | 5th Kyu | 389 |
| Liam Fiolet | 6th Kyu | 397 |
| Alexander Osborn | 7th Kyu | 359 |
| Mietta Scarlett | 7th Kyu | 398 |

SMS Instructors Report EXIT

This screen is designed to allow reception staff record students attending classes. Classes on the timetable for that day are listed on the left. Simply click a class to make it active. Then enter the student number or make to locate students, once located click Add to class. You can record instructors by clicking on Alter Instructors. This screen also allows you to send bulk SMS’s to all students in a class or produce a report of students in class.

If there is a Class Role for this class then 2 additional buttons will appear, Click Class Role to get a listing of all those on role and Not in Class button to make it simpler to add students who will be attending.

Note: this screen will accept scanner input.



Member Entry & Barcodes

Go to the Attendance menu and select **Member Class Entry**. When you first open this screen it will be waiting for a student number to be input, once it is you will see the students details and classes available for them to attend as shown below.

Member Class Entry
Seido Karate - Grovedale

| Time | Class |
|-----------|----------|
| 1 5:15 PM | Junior |
| 2 8:00 PM | Sparring |

Select class by entering number

Class:

Available class:

Class attending:

Student: 100
Jesse Robinson

Seido Juku Karate

Grade: 2nd Kyu Yth Promoted: 25-Feb-06 (30 weeks)

Classes since Gradings: **52**

Average weekly attendance: **1.79**

Scheduled Gradings

| Try for | Date | (weeks) |
|---------|-----------|---------|
| 1st Kyu | 28-Oct-06 | (4) |

Affiliation Fee OVERDUE: **25-Sep-06**

Added to class 1

Enter the number of the class being attended to record attendance. This screen shows scheduled gradings, attendance data and any over due fees. If you have a scanner and / or numeric keypad it will accept input from these devices.

Barcodes: You print student cards and barcodes from the **Student Id Cards** option on the student menu. For barcodes to scan it must be good quality print, either use a laser printer of ink jet with photo paper. When you print barcodes if you see numbers instead of the barcode there has been a problem with the barcode font installing. To rectify this remove the font file 3of9barcode.ttf from the font folder. Then reinstall it.

Class Entry Module

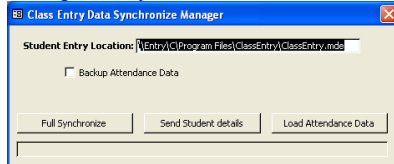
The other option for recording attendance is the Class Entry module, this program gives you much greater flexibility in how attendance capture is performed. Overdue messages and lock outs can be customized with different time periods for different fee types. To use the class entry module:

1. Install the class entry module from the CD. This can be installed on the same computer as the main module or a separate computer. For ease of use it's



recommended that the 2 computers be networked however this is not essential.

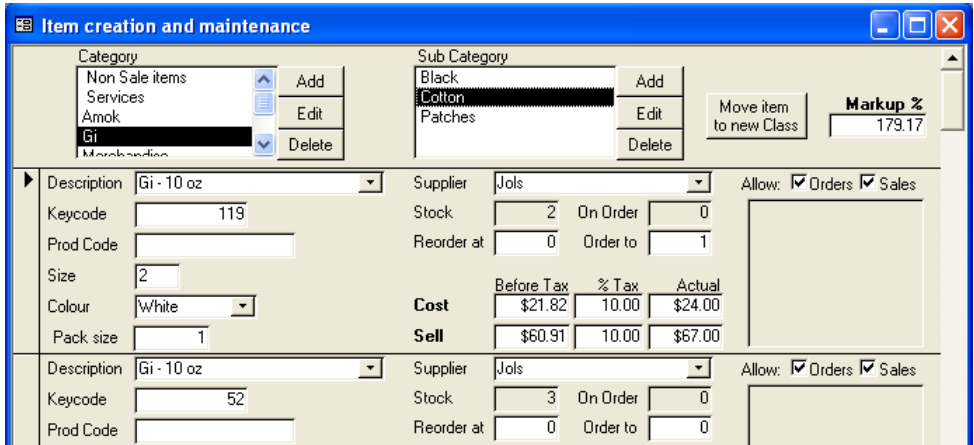
- 2. Send data to class entry module from main computer. If computers are networked you can use the **Data Synchronize** function on the file menu. In this screen you need to update the Student Entry Location to be the path to the class entry module. Then you can perform all your data transfer needs simply by selecting full Synchronize.



- 3. If the computers are not networked to transfer data you will need to use the file menu options, **Export Member Data** and **Import Attendance Data**. The file created with the export function needs to then be transferred to the class entry PC and imported. Likewise the attendance data is exported from the class entry module and sent back to the main module.
- 4. Open the class entry module, close the Student Entry screen to access the menus. Then select import data to load the student information. Periodically you will need to go to this screen and select export data to create a file to send back to the main module (note: none of this is required if you use the sync screen).

Stock and sales

The first step in setting up all your stock is to enter all the items. Go to the stock menu and select the **Items** screen.



You can set up **Categories** and **Sub Categories** to group the items you sell. Use the Add, Edit and Delete buttons to set up as many as you require. You should use these to



logically group items, this will allow you to easily find them and also to look at sales, profits and other statistics for categories. There are two special categories:

- Non Sale Items – these items can be included on orders to suppliers but are not included in stock takes and other functions related to stock management.
- Services, these items are not ordered but can be sold. Here you can include private tuition and other items.

To add items select the category you wish to add the item to, scroll down to the bottom of the items for that Sub Category then in the blank item enter in the details.

Description, Size, Colour: meaningful description of item

Keycode: this is a unique number for the item, will be system generated.

Prod Code: enter barcode here if you are using a scanner and item has it's own code.

Pack Size: If you can only purchase in a pack of more than one item enter pack size.

Reorder at: when generating orders is used to check the stock level before reordering.

Order to: if generating order and reorder is required this is the level it will reorder to.

Cost, Sell: What you pay and what you sell items for.

Orders

You can now create orders, go to stock menu and select **Orders** screen.

Order Creation, Maintenance and Receiving

Supplier Name: Martial Sports Australia
 Supplier No: 3
 Order No: 48
 Status: Finalised

| Keycode | Description | Qty | Unit price | Tax % | Cost |
|---------|--------------------------|------------|------------|-------|----------|
| 158 | Gi - 14 oz White 7 | Ordered 1 | \$60.00 | 10 | \$60.00 |
| | | Received 1 | \$60.00 | 10 | \$60.00 |
| 40 | Head Guard L | Ordered 4 | \$28.00 | 10 | \$112.00 |
| | | Received 4 | \$28.00 | 10 | \$112.00 |
| 156 | Head Guard XL | Ordered 1 | \$28.00 | 10 | \$28.00 |
| | | Received 1 | \$28.00 | 10 | \$28.00 |
| 80 | Shin & Instep - Vinyl L | Ordered 3 | \$29.70 | 10 | \$89.10 |
| | | Received 3 | \$29.70 | 10 | \$89.10 |
| 79 | Shin & Instep - Vinyl M | Ordered 2 | \$29.70 | 10 | \$59.40 |
| | | Received 2 | \$29.70 | 10 | \$59.40 |
| 154 | Shin & Instep - Vinyl XL | Ordered 4 | \$29.70 | 10 | \$118.80 |
| | | Received 4 | \$29.70 | 10 | \$118.80 |
| * | | Ordered | | | |

Order Total: **\$622.06**
 Received Total: **\$622.06**

Creating orders is simple click create, then select the supplier. If you set the reorder at and order to fields in the item screen then you can click generate and the items you need will be automatically added. Alternately you can add items by selecting the item from the list and entering the quantity required. Initially only items for the selected supplier will be shown. If you want to order items normally ordered by another supplier just click the show all button. Once you are happy with the order click Approve. If you then need to



update it, just click update. When you receive the order click receive, enter quantities received then click complete.

Setting initial stock quantities

When first setting up your stock you can use the **Stocktake** function on the stock menu to update your stock records so you have accurate stock on hand figures. Click adjust stock to all direct update of stock records. By creating orders and recording all sales your stock levels will then be maintained.

Sales

To record sales, go to stock menu and select **Sales** screen, or click the sales button in the view student screen.

Student ID: 30 Current Student
Name: Josh Wylie

| Category | Description | Sell |
|-------------------|-------------------|----------|
| Supplied_training | Level 2 First Aid | \$150.00 |
| XMA-Extra | Boken Bag | \$27.00 |
| XMA-Extra | Hakama - L | \$62.99 |
| XMA-Extra | Hakama - M | \$69.00 |
| XMA-Weapons | Bo | \$50.00 |
| XMA-Weapons | Boken | \$49.00 |
| XMA-Weapons | Boken | \$49.00 |
| XMA-Weapons | Chucks | \$38.00 |
| XMA-Weapons | Foam Boken | \$47.43 |

| Keycode | Description | Qty | Unit price | Cost |
|---------|------------------|-----|------------|---------|
| 129 | Gi (190) Black 6 | 1 | \$49.00 | \$49.00 |
| 133 | Boken | 1 | \$49.00 | \$49.00 |
| 143 | Boken Bag | 1 | \$27.00 | \$27.00 |
| 137 | Hakama M | 1 | \$69.00 | \$69.00 |
| * | 0 | 0 | \$0.00 | \$0.00 |

Total Sale Price: \$194.00
 Markdown: 0% \$0.00
Amount Due: \$194.00
 Amount Paid:
 Change Given:

PROCESS

Clear All Items \$194.00

Simply select items, enter quantity sold, update costs if needed then click process.

Fincance

Expenses

Go to the Finance menu and select **Line Types**. This screen allows you to set up how you will group income and expense items.

The summary line is used to group the actual lines. Each line is either an expense or income line.

| Summary Line | Expense | Description | Tax |
|--------------|---------|-----------------|-----|
| Apportion | Expense | Shared Expenses | 10 |
| Martial | Expense | Training | 10 |
| Non-Capital | Expense | Banking | 10 |
| Non-Capital | Expense | Accounting | 10 |
| Employee | Expense | Net Pay | 10 |
| Employee | Expense | ifax | 10 |
| * | | | 10 |

Record: 14 of 21



To record expenses or other income, Go to the Finance menu and select **General Ledger**.

Ledger

Show Entry Type: All
 Accounting - Expense
 Advertising - Expense
 Banking - Expense

Transactions Date: 01-Jul-05 To: 27-Sep-06
 Limit to Supplier: All

| ID | Date | Supplier | Description | Amount | Tax |
|-----|-----------|-----------------------|-------------------|------------|-----|
| 935 | 28-Sep-05 | Google | Ad costs | \$223.82 | . |
| 729 | 27-Sep-05 | KMA Supplies | MA Success Kit | \$178.95 | 10. |
| 721 | 27-Sep-05 | Unidentified supplier | Tournament Income | \$3,708.00 | 10. |
| 701 | 27-Sep-05 | Orange | Phone | \$114.90 | 10. |
| 800 | 26-Sep-05 | Virgin Blue | Airfare | \$178.00 | 10. |
| 950 | 26-Sep-05 | Virgin Blue | Airfare | \$81.00 | 10. |

Record: 365 of 447 (Filtered)

Format Report

This screen makes recording expenses and additional income easy. Simply enter item details. You can use the category selection, date and supplier fields to limit transactions as required, this makes locating and checking entries easy. Clicking the column headings will sort the data by that heading.

Student Accounts

Student accounts can be used for recording money owed, tracking payments for camps, overseas trips or other larger expenses, recording scholarships or other bonuses you may be giving students.

The simplest way to record expenses against an account is when you have entered an amount for a sale or other item and a receipt is created click the ‘Cash’ box and change this to ‘Account – Invoice’. An account will be set up for that student and the sale amount transferred to that account.

To set up other types of accounts go to finance menu and select **Account Types**, then **Accounts** to assign these to the students. Transactions are entered directly against student accounts from the account screen also. When a payment is being received locate the students account in this screen and click enter transaction. If this is a non financial entry (eg. Credit being given as a scholarship) leave the entry type as Account Direct Entry. If it is a financial entry (account payment) change this to (Account payment entry), enter a description and the amount, make sure if it’s a payment to you it’s credit, from you it’s debit.



Employees

The employee menu is used to record and track employee hours worked and generate pay records.

You must first add employees to the main member database. If you do not want them in an existing style or program, then set up a separate employee program so you can record them under this.

In the **Employee** screen you can select the employees whose hours you wish to track. You can track the work of volunteers by entering their hourly rate as 0. If you select the “**Pay For Class When Instructor**” option then a work record is automatically generated whenever they are recorded as an instructor or assistant in a class.

Once an employee is set up you can set up standard hours for them to work with the **Work Hours** screen or skip this step and just have employees record whatever hours they work.

Hours worked are recorded using the **Clock On / Off** screen. If you have set up standard work hours it will attempt to match employees clocking on / off to these to determine their actual work hours. These work hours are then reviewed and approved for payment with the **Approve Hours** screen.

The actual pays are then managed using the **Manage Pays** screen. In this screen you first use the **generate employee pays** function to add up all the work hours for the period and generate a payment record for each employee. To these you add any additional payments, deductions and tax. You can then print pay slips and other reports you may require before closing off the pay period.

For more information see manual installed with software.



What users think of Club Administrator...

I have been using Full Contact Software now for almost 4 years, **it just keeps on getting better**. Having wasted a whole lot of money on several programs I am so glad we found "full contact".

Having stats at your finger tips is an essential element to achieving good business success, **it does it all from student management to stock management**. It really is the A to Z of software that no serious school owner can do without.

In fact one of my first recommendations as a professional martial arts business consultant is to buy this program. It is the only program I recommend or use.

*Master Fari Salievski
KMA Black Belt Success Schools*

It's been almost a year since we began using Club Administrator and it has been a great help to our organization. We are the headquarters to a worldwide organisation and we oversee over 500 students at our location alone. With so many options and capabilities, Club Administrator is a must for any size school. We've been through other check-in/administrative programs, but **Club Admin is the best and the technical support is by far incomparable**. I recommend this program, to anyone.

*Kyoshi Akira Nakamura
World Seido Juku Karate Organisation Honbu, New York, USA*

I have been using club admin software for five years now. During this time I have been given free trials of other software all promising to be better to do this or that. However they have all failed to perform. Club Administrator does what I want. **It is easy to navigate and update**, Malcolm is great with upgrades and support (never more than a phone call or email away) Club admin tracks attendance, gives me usable stats on retention growth, birthdays, new students starting stopping tracks my stock **it is a complete package**.

I fully endorse full contact software it has helped me get to where i am (over 300 active students) and **without this software I don't think that would have been possible**.

*Master Phil Monaghan
Diamond Martial Arts and Health*

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