Full Contact Software

Club Administrator

- User Guide

- INSTALLATION OF SOFTWARE
- SETTING UP DATA / LOADING DATA FROM EXISTING FILE
- MAIN ADMINISTRATION MODULE
- CLASS ENTRY MODULE

Last revised for version 4.08

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Getting Started

Installing Software

- Software is compatible with Windows 7, Vista and XP.
- Software can be downloaded from www.fullcontact.com.au or is available by request on CD.
- Install main Club Administrator application first following the prompts from the installation program.
- If you wish to have members 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.

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.
   - In some instances you may be required to uninstall the current version first. If prompted to, do so, your data file should not be removed during the uninstall process however we strongly advise that a backup is taken before any uninstall.
   - 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 .

Overview of system

The essential components of the Club Administrator application are:

- **Club.MDB access database** - This will contain all your member, class, membership, attendance, stock and sales etc. data. You should backup ensure that this file is regularly backed up, in the case of problems with your system you will require a backup to restore your data.
- **Club Administrator application** - Your interface to this data is the "Club Administrator" application screens and reports. The data you access via these screens is fully validated and the user interfaces provide simple access with a minimum of effort. You should not attempt to alter or use this data directly in any way, doing so risks corrupting your

database. If you require the data to work on directly this can first be exported with custom reporting.

- **Class Entry application** - If you choose to install the "Class Entry" module on this same PC or other(s) then you will also have the option of allowing members to easily enter their own attendance details by either scanning the barcode on their member cards or by entering their member number. This data is then at a later point in time to be loaded into the Club database.

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Deciding on system configuration

For most users the Club Administrator module will be installed on a single PC with the Class Entry module on a separate PC (if being used). With this configuration ideally the two computers should be networked to allow the easy transfer of data between them. It is possible to have multiple copies of Club Administrator running over a network. To do this install Club Administrator on all PC's removing the "Club.mdb" file and placing this on your server, all modules then link to this one central file. To link them use the file-open database function, using the same full network path for each to locate the club.mdb file.

If you decide to employ the use the barcode / scanner facility then before you begin producing your member cards you will need to check the scanner output format and decide on an appropriate barcode set-up (see Class Entry module guide for more details).

- ***Which main module to use?***

When you install club administrator you will be asked which version you wish to use, the choices are as follows:
LIMITED VERSION: If yours is a club with less than 70 members, you don't use contracts and you only want to run on a single PC then our Limited version will meet all your needs.
PREMIUM VERSION: There are no limitations on the premium version. It is designed for clubs that have a simple structure, only offering a single program or style.
PROFESSIONAL VERSION: This version provides functions to run several styles or programs. Eg. A martial arts school may have Karate, BJJ and external school programs, a dance school may have Jazz, Hip hop and private lessons they wish to separately track. In tracking these you can also record grades or levels for each.

- ***Do I want the Class Entry module?***

Are you going to have members recording their own attendance? If your not you don't. Otherwise if you answer yes to any of the following questions you will:

1. Will you want them to be able to do it on a different PC to the one you have installed the main module on (This is often preferable as it keeps main PC free for other tasks)?
2. Do you want to use audible messages (eg. to remind members of fees or to confirm entry in class)?
3. Do you want to use pictures in place of words to represent some classes (ie. your youngest children will enjoy selecting the dragon to enter class. Members as young as 5 can consistently enter their own attendance correctly with this option)?
4. The entry module does not contain any other details and is robust enough that members can not do anything else but enter their class if it is left open with just a keypad or barcode reader for them to use.

This also makes it highly reliable and with a very low high availability rate (around 99%) in most installations. Do you want the added security of class entry being a separate application?

Opening for the first time

After starting the Club Administrator you will be presented with the main application screen, with menus and icons at top. If the data file (club.mdb) required for storing your data could not be located you will be presented with the Open Database screen to locate it.

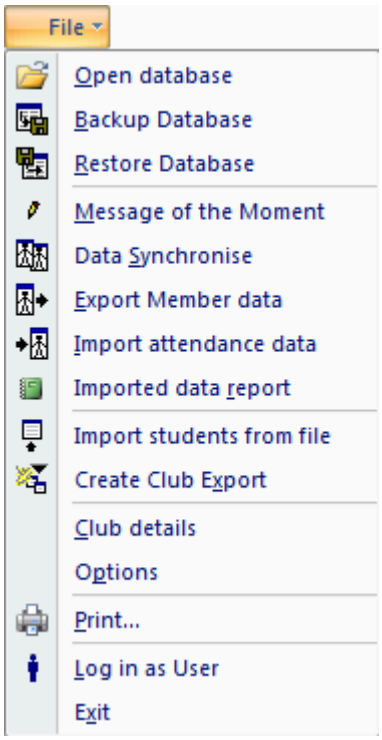
By default club Administrator is installed in the c:\clubadmn\ folder and the club.mdb file is placed in this folder you may move this file to another location (server for example) if required.
If you wish to use a data file in a location other than the default then go to the File menu. Then the Open Database Option. You should now locate the Data by entering the directory and the file name "Club.mdb". See Open Database for more info.

Initial set up of data

There are several bits of data that you will need to set up before other details can be entered. It is recommended you look at the quick start guide for information on initial set up of data.

- ***Configuration Options***
  Go to the File menu and select **options**, select each tab and enter settings. Most importantly if you wish to track GST select the Tax tab and set this up now. Options can be altered later if required. On the file menu select **school details**; enter your club name and logo now also if you wish.
- ***Enter your members.***
  1. Go to the Grades menu, select **Grades** and enter in all the Grades or levels you will use. The number on the left indicates the order member's grade in with 10, beginner always being lowest. If you have multiple styles enter all grades for one style then all grades for next style. Note: junior & senior grades do not need to be entered separately.
  2. Go to the Membership menu and select **Member types**. You will see some standard ones already set up, use these as a guide. Note: Limited version does not allow use of contracts.
  3. Now go to Member menu and select **Add Member**, enter all their details then click add. If you have family memberships when you enter the second or third members under membership details click "Add to existing" then select the first member on the membership from the list.
  4. Alternately you can use the **Import Members From File** to load member information from an existing file.
- **Entering classes.**
  1. Go to the Timetable menu, select **Class Types** and enter all your class types you use.
  2. If you are recording classes at more than one location, select and enter **Locations** from the timetable menu.
  3. Now choose **Update timetable** from the timetable menu. Add all your class details.
  4. You are ready for members to be put in classes. Select **Attendance Entry** or **Member direct entry** from the Attendance menu and you can begin. Note to use class entry module you need to use dojo sync to transfer the data you just set up, or go to File menu and **Export Member data**, to create file then start Class Entry modules, close the entry screen that appears and select Import Data. Then select Alter display criteria and enter settings for how classes are displayed. (To set up Pictures and Sounds select options from top menus.)
- **Entering Stock and sales.**

1. From the stock menu select **Items.** You will notice at the top of this screen are categories use these to organise your stock, to make items easy to find, report and for analysis of sales. There are two special categories Non sale items, belts and items you will not sell to members should go under here. Services, items you don't keep stock for or raise orders but incur a fee (eg. intro class or camp). Set up or select the category for the item your adding and enter all item details. (Maximum 30 items for limited version).
2. From the stock menu select **Count / Update Stock**. Select adjust stock option and enter initial counts.
3. You can now record sales, select **sales**, or create purchase orders, select **orders**, from same menu.



File menu

Functions in this menu are for managing file locations, importing exporting data.

You can also set your clubs name and logo, along with various other options.

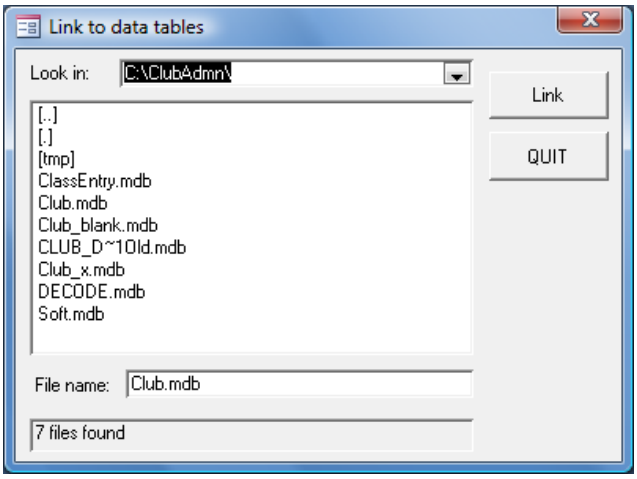
Exit will shut down the application.

Open database

FUNCTION: Establishes link to data file containing all information entered into application.

USE: For a standard install you may never need to use this screen. When you want to move the main data file to another location then you use this screen to link the club administrator application to it.

This screen must be used to locate the Club.MDB file that contains the data used by the application. This file can be renamed or located in another directory but the structure of it and the tables within it must not be altered.
Once the file is located click Link. The application will then attempt to establish a connection to all the required tables within it. If you move or rename the club.mdb file you will need to link to this file every time you upgrade or reinstall the application.



Backup Database

FUNCTION: Produces backups of the database.

USE: Hardware failures and other problems can occur so this gives you the ability to protect your data by backing it up. This should be done regularly, daily for large clubs, weekly for small clubs.

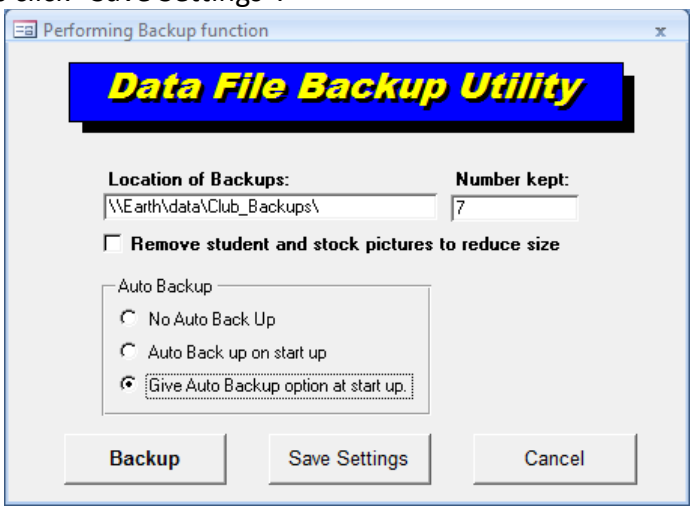
It is essential that you regularly back up your data. In the event of hard disk failure or other system problem you may have to restore your system using your most recent backup.

If you have a second internal hard drive then you may use this to store a backup to do this the location backup is selected then the Location that you wish to store the backup in, along with the number of copies to be kept is entered. If your system is connected to a network you might want to back up the data to your network, this can be done using a network address as shown below.

You should also consider keeping a backup on flash drive or other media that can be stored in a safe location away from the computer (in case of fire or theft).

Once you have specified the location you wish to backup the data to click backup and the backup will place a zip copy of the member database in the specified location. You must have a copy of pkzip.exe in your application path for this to work (see installation notes in this guide).

It is advisable to backup your data every day. You can have a backup performed automatically when you start Club Administrator by selecting the Auto Back up on start up option, with this option a cancel screen will appear briefly (5 seconds) before the backup starts. This option has been provided so that you can start the PC walk away and if you have Club Administrator set to run automatically on start up you can come back and everything will be ready to go. However if you need to get into the software in a hurry for some reason there is a 5 second window when you can cancel the backup before it starts. If you want the software to stop and wait, giving you the option to perform a backup or start without one then select the third Backup option. After changing these settings click “Save Settings”.



Restore Database

FUNCTION: Restore database from backup file.

USE: If you need to restore the database for any reason this will unzip the backup and copy it into place for you. It then checks to make sure all the tables can be linked to.

Using this function you can locate the backup file that the database needs to be restored from and restore it, replacing the current member database file. Note any data in the current member database file will be lost when it is overwritten and cannot be recovered.

Note: If you have screens open or other instances of the database open when attempting to restore database, it will fail. If you receive a warning in this dos window "Club.mdb file exists replace or abort", choose 'R' for replace.

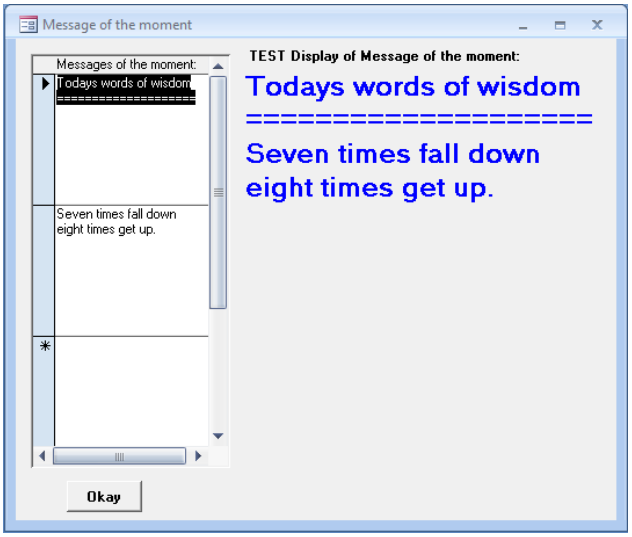
Message of the Moment

FUNCTION: Enter / Update message displayed on welcome screen of Class Entry

USE: Reminders about events, words of wisdom or other messages can easily be displayed.

The message you set here will be transferred to the Class Entry module and displayed to members when they are putting in their member numbers.

Enter the message on the left and it will be displayed on the right in the format it will appear in when displayed to members.



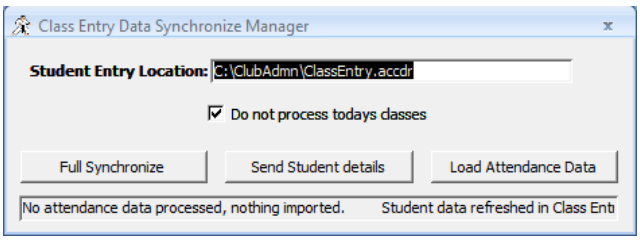
Data Synchronise

FUNCTION: Transfer data between this application and the Class Entry module (which is designed for allowing self registration by members for classes).

USE: Where you are able to map to the class entry module directly this simplifies data transfer.

The Data Synchronise function enables the transfer of data between the main module and class entry modules in one easy step.

This can only be used if the modules are either on the same machine or machines that can map to each other over a network or other communication medium. The location of the Class Entry Module is entered in the member entry location. In the example shown the location is in the default location on the same machine. If it was on a different PC called PC2 with the folder it was installed to shared as Entry the location would be **\\PC2\Entry\ClassEntry.accdr**



Full Synchronise

This will perform Load Attendance data then Send Member details. (See individual functions below for more details on each.)

Send Member details

This transfers all required data from the main module to the class entry module selected. It performs the same function as doing an export of data and then an import into the class entry module.

Load Attendance data

This transfers the information regarding attendance collected from the class entry module back to the main module. Performing the same function as exporting from the class entry module and then importing into the main module.

Export Member data

FUNCTION: Create data file for loading data into Class Entry module.

USE: Use this to create file containing member and timetable details that is used by class entry module.

This function is only required if you choose to use the "Class Entry" module for recording member attendance. Issues in relation to these functions are covered more fully in the "Class Entry Guide".

To export data required by "Class Entry" module simply select disk and / or directory and all data required will be exported to this location in flat files. The format of this data enables it to be stored in a very small amount of space; you should never require more than one floppy disk to hold this data.

Import attendance data

FUNCTION: Loads attendance data contained in export files from Class Entry module.

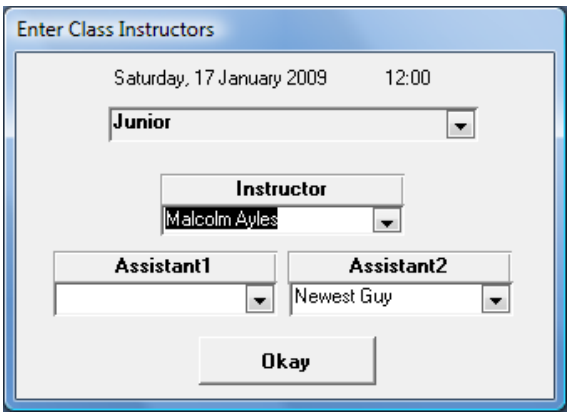
USE: Use this to load attendance data from the Class Entry module if you are not using dojo sync.

This function is only required if you choose to use the "Class Entry" module for recording member attendance. Issues in relation to these functions are covered more fully in the "Class Entry Guide".

To import data locate the file for import that was exported from the "Class Entry" module. Then click import. All data will be automatically processed unless you request to be

prompted to confirm the Instructor and Assistants for any classes being newly created in the database. All data will be loaded to the appropriate tables.

Once Import is completed the file will be moved to another directory. And you will be given the option of viewing a report of the imported data.



Imported data report

FUNCTION: Reports all data imported in the last import of data by the Import Attendance Data function.

USE: You can use this to check what data is being loaded and to check what members where in a class.

Reports all data imported in the last import of data by the Import Attendance Data function.

Imported data report

My dojo

Class: **Yellow Senior - 06:40 PM, Monday 26-Jul-99 Belmont** ***Import Okay:*** **YES**

Instructor: Sensei ***Assistants:*** Malcolm Ayles -

Member	*Sex*	*Grade*	*Age*
1046 Tracey Hogan	Female	5th Kyu	21 (02-Oct-77)
1022 George Tomas	Male	8th Kyu	28 (16-May-71)
1020 Greg Bunting	Male	6th Kyu L2	24 (01-Jul-75)
1011 Tom Windsor	Male	5th Kyu L1	20 (18-Jul-79)

Number for class (4 members) Grades range from 8th Kyu to 5th Kyu L1 Ages range from 20 to 28

Import Members from File

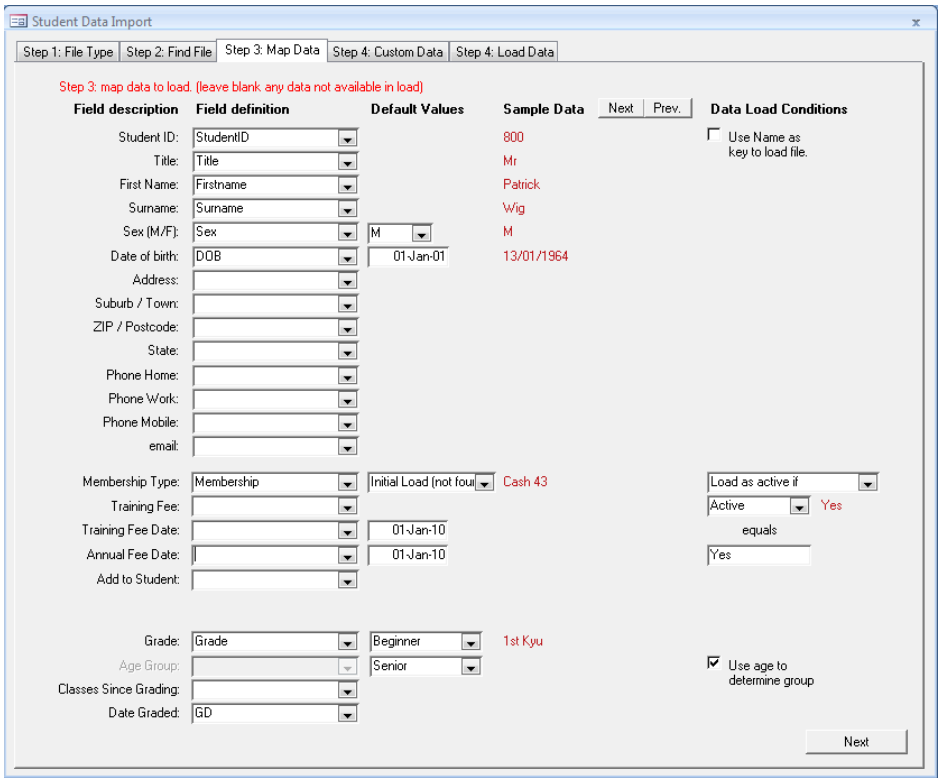
FUNCTION: Load member data from an existing file.

USE: This will allow you to load your data from a flat file. There are two main uses for this: when you initially set up the system and you have a spread sheet or other records you wish to load to save manual entry time; the other use is if you wish to periodically load data from a club you are associated with so when their members come you have their details on file.

NOTE: The import function allows for the import of data from single or multiple files and caters for the data in various forms of completeness. It can take a few goes to get the import of data to work exactly as you want it. If you are having difficulties contact Full Contact Software for assistance.

Prior to importing member 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 Members 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 members record is in more than one file you must be able to like them by either member ID or name. To link by name check 'Use Name as key to load file'.



a. **Member ID**, if you have an id number assigned to members 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 members set a default value and this will be loaded against members where it is missing.
d. **Membership details**, all members will be assigned a membership type, if you wish to load all members 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 member are associated with the same payment then these can be loaded to the same membership. The paying members number needs to be specified in the 'Add to Member 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 where 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.

MemberID	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 member 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.

Note: If you wish to change the file format or the file location once you have specified these simply close Import form and start again.

Create Club Export

FUNCTION: Creates a file containing summary information about members.

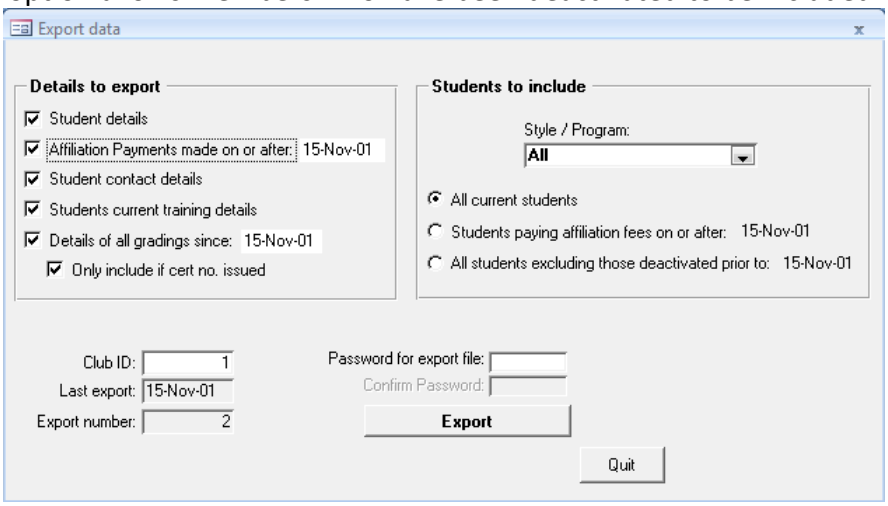
USE: If you wish to use your data directly in an access database this enables you to extract it in a format that will be simple to work with.

Member details must be included for records selected, these are only basic details, Member number, name, age, sex, grade, date last graded ect. In addition to these the following details may be included:

- Affiliation payments made, payments after entered date will be included.
- Members contact details, address, phone numbers, e-mail etc.
- Current training details, date they last trained, average classes a week, classes since grading.

Next you should specify the members to be included.

- The default of all current members will only include active members.
- Id you select members paying affiliation fees then the date selected here will automatically be made to correspond to that selected in details to export for affiliation payments.
- Or the third option allows members who have been deactivated to be included.



ClubID: This must be entered (will default to previously entered value). These should be issued across an organisation to provide a unique key to identify clubs by.

Password: The database file created by the export is encrypted. When you include a password with this the safe transport of data is ensured.

Club Details

FUNCTION: Allows you to set your club name and address details as well as logo.

USE: Most of the reports and some of the screens in the Administrator display your organisations name and Logo. This function enables you to specify them.

There are two logo's displayed at various times. These Logo's are not stored within the database but are referenced from outside it whenever they are needed so it is recommended that a copy be put in the "\clubadmn\" directory.

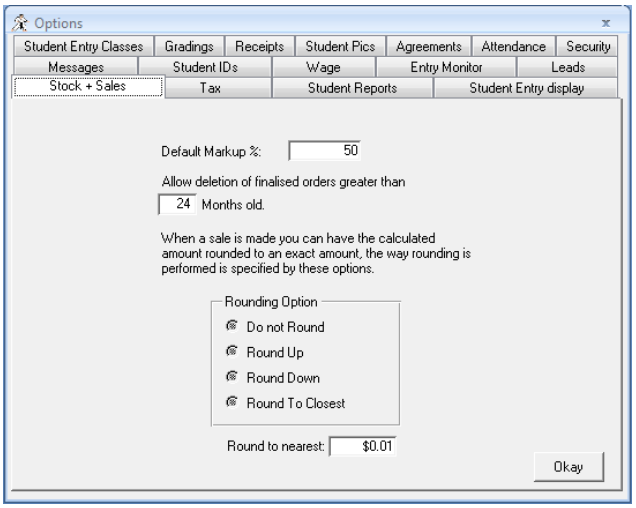
The name of your club can be set as up to 100 characters however it is recommended that you limit it to no more than 35 characters to allow it to fit on all reports and screens where required.

Options

FUNCTION: Provides access to various option settings that control application function.

USE: Most of the options in this screen will not need to be updated once set. You should review them whenever installing a new version.

Stock + Sales



Mark up: The percentage entered here is the default mark-up applied when items are created.
Order Delete: Orders may be deleted after this number of months has passed from them being finalised.
When making sales of Merchandise you may often end up with single cents due to markdown percentage being applied. If you wish to always round figures in a certain way then select the way you wish to round from this screen.

Tax

If you wish to add tax to purchase and sale prices then check "Allow use of tax options". There is a full explanation of Tax options and use of tax at the end of this Guide. See TAX COMPONENT.

Member Reports

When producing member reports you can elect to include contact details and / or fees on the report. These options can be selected independently for member reports produced in the application and those created as an attachment when sending emails.

Member Entry Display

The first field on this screen determines how many months' members average attendance will be calculated over for both the Member entry screen of this module and the class entry module.
Enter the number of months over which you wish to calculate members' average attendance.
The following options relate only to the Member Entry screen in this Module.
Show members Grading, if selected will cause members proposed grading dates to be displayed.
Fee display options, if selected will cause selected fee type to be shown when falling due.
Overdue fee warning screen if selected will show a pop up screen when fees are overdue.

Messages

You can send messages from Club Administrator by email, SMS or IM the options here control how this will work.
Default Subject for emails: Enter the default subject line that will be sent to members when sending an email. Using [Title] [Firstname] [Surname] or any other field available when sending emails and these will be substituted for the appropriate member information when sending.
Create note when sending message: checking this will have notes created by default for any message sent, recording the message details against the member.
Open email before sending: will set emails to open before send by default.
Default multiple send setting: when sending multiple messages you can specify the order of communication methods you wish to use to send a message to a member or select just one or more to be used.

Emails before pause: depending on the email server you use there may be restrictions in regard to the number of emails you can send at once before having to wait a period of time to send more, these settings allow you to stagger the sending of emails so your server does not incorrectly think a virus or some other problem is sending them.

Allow use of Skype features: Skye will allow you to communicate directly from the software with SMS, IM, mobile and landline calls, if you wish to use Skype select this option. You will need to install Skype on the PC and have it running.
Default International prefix: Skype requires international format numbers when sending messages or calling phones, setting this option allows you to omit the international prefix when entering numbers in Club Administrator.
Default Area Code: Similarly for local land line numbers you can add the area code here rather than having to add them all individually.

Some actions in Skype take a couple of seconds for this reason you have the option to limit when Club Administrator will attempt to connect to Skype.

- Check Skype for numbers when adding / updating: when you update a phone number you can check if it exists in your current Skype contacts.
- Check Skype for handle when sending single message: Similarly if you are sending a message skype will search for a contact with that number.
- Check Skype status in screens other than message screens: if a member had a skype handle any time you view their record this will cause skype to check if they are online. Doing this will slow screens commonly used like view member.

Use Messagenet for SMS: Prior to Skype messagenet was used to send SMS messages to mobile phones in Australia. Skype can perform this same function however messagenet is still supported for those who wish to continue to use it.

Member ID's

You can set a range of member numbers to be issued to members rather than just continuing from the last issued number.

Wage

Under this option you can specify penalty rates that you will be using, pay period length and the start of the last pay period as well as last pay date. The dates are updated automatically when you finalize a pay period however you can adjust these at any time if required.

Entry Monitor

Under this option you can select to do a full sync any time a new day starts if the entry monitor is open. This means that if left open over night a transfer will happen at midnight. Or when the monitor is started each day a send will automatically happen. You can also select to have it start on start up. You can also specify the alert that is played when a flagged member logs into class.

Gradings

When grading a member if the requirements for this grade have not been met you will be asked to reconfirm the request, selecting this option removes the reconfirm requirement.

Receipts

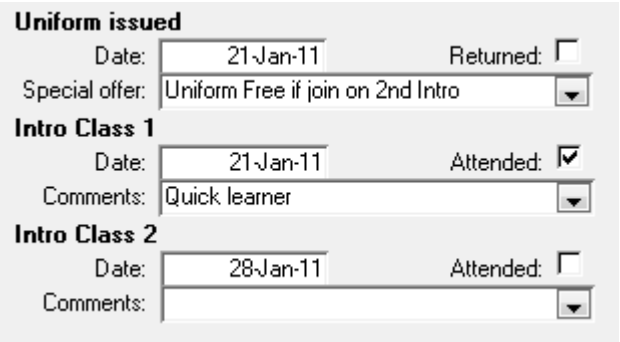
There are two receipt options:

- If you wish to prompt for payment type every time a receipt is created check the 'Prompt for payment type' option.
- There is also a 50mm receipt docket option if you wish to use a docket printer instead of a regular printer.

Leads

Use Advertising results form. This will display the advertising results form everytime a new member is added (in add member or leads forms), reducing the chance of this information being missed.

The remainder of the fields on this tab are used to configure the appearance of the leads form. You can record against each lead three events. For each event you can have a Date, Check box and Text box displayed.



Member Entry Classes

The criteria on this screen determines what classes will be displayed when members come to enter classes.

Gradings

If you do not wish to be alerted to members not meeting promotion criteria when promoting them check this option.

Member Pics

If you select the 'Use Microsoft Photo Editor for Pictures'. Then that will be the editor that is automatically invoked to edit and work with pictures. This utility provides the smoothest interface for working with pictures. Unfortunately this utility was replaced with Microsoft Office Picture Manager in office XP and this does not provide the same interface. (If have a copy of Microsoft office prior to XP Photo editor can be installed from that.)

Agreements

If you select use Agreements to manage all contract payments then you will need to create an agreement before you can enter contract payments and these payments will be associated with the agreement, this is ideal for tracking fixed term agreements.

If you want to show Setup and administration fees on printed agreements then select these options.

Attendance

Class Roles are used to specify which members can attend a specific class. Where members absent need to be billed, select this option to allow bulk billing of those absent from a class.

The second field here allows you to enter the number of months over which you want a members average attendance calculated.

The check box if selected will mean that the average attendance is only recalculated when you restart the club administrator application or when you select the recalculate option from the housekeeping menu.

This figure only changes marginally on a day-to-day basis so this should normally be quite acceptable. However it will slow start-up of the application.

Security

This option can force log on of user before any functions within Club Administrator can be used. This can protect from unauthorised access to your data.

Print

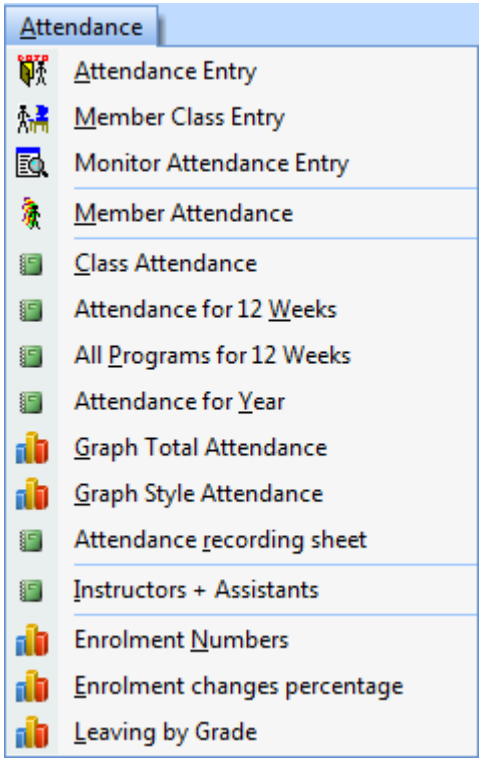
FUNCTION: Standard Windows print function.

USE: Can be used for all screens and Reports to produce a report. Where you do not wish to use default print settings for a report select this instead of the print icon to allow these to be altered before sending to printer.

Log in as user

FUNCTION: Log on as a specific user.

USE: If security is being used on the database access to certain functions may be restricted to specific users. You can use this option to log in as a specific user, if a user is already logged on then you can use this to change users also.



Attendance menu

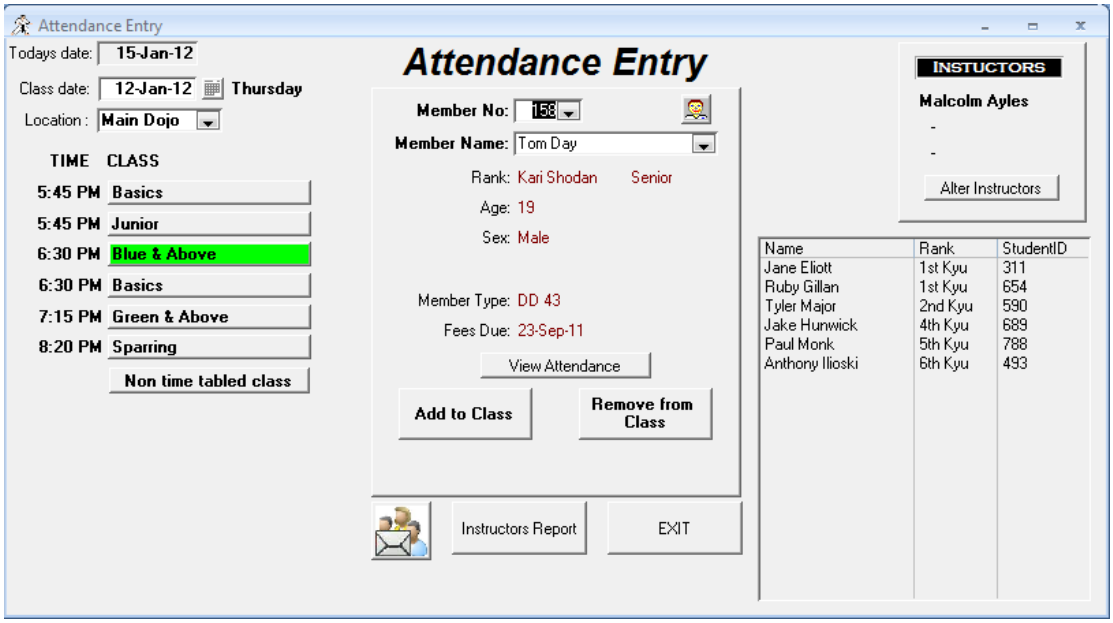
Provides functions to enter members into classes. Reporting on member's attendance at classes as well as overall attendance and enrolment reports.

Attendance Entry

FUNCTION: Interface to allow administration person to record member's attendance.

USE: Record member attendance with this screen. This can be done either at time of attendance or at some future time. It will warn of overdue fees, suspended members ect.

This screen is designed to allow members attendance to be recorded easily by an administrator at either the time of their attendance or at some future time.



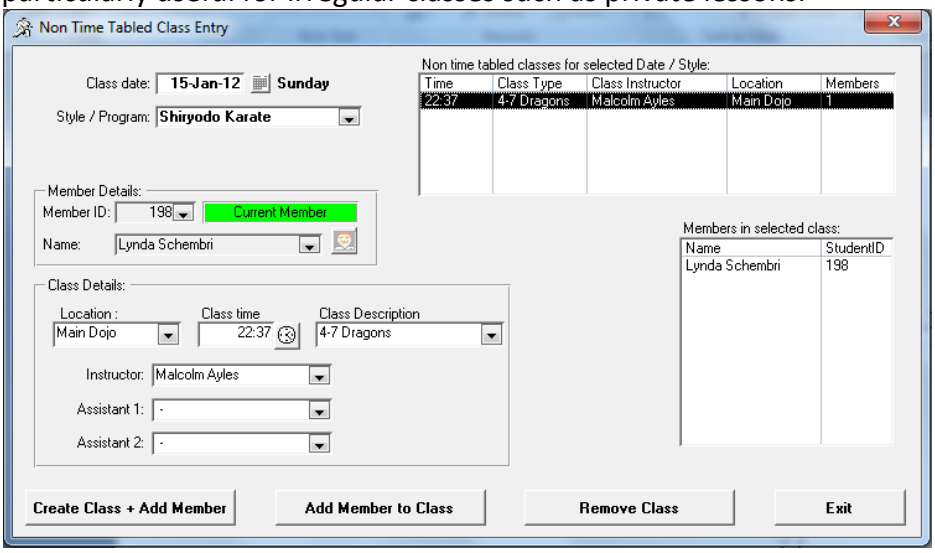
Selecting Class:
If the class is for a day other than the current date enter the correct date.
Check that the location is the correct location. All the classes available for this date and location will then be displayed in order of start time.

When you select one of the displayed classes a class record will be created. On the right side of the screen you will see the instructors displayed.

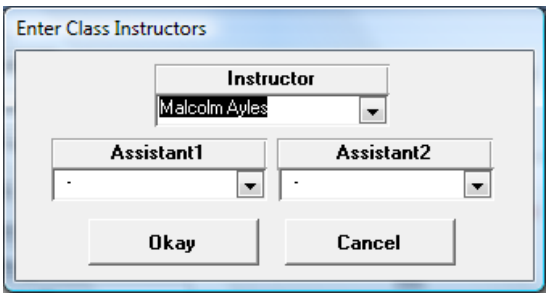
Adding members to Class:
Scan member card; enter name or number to Select Member to be added to class. Then press Add to Class. Validation of members eligibility to attend class including a check of their fees will be done prior to them being entered in class. If any problems are found warnings will be issued for these before member is added to class.

Removing members from Class:
If you wish to remove a member from the class you can either bring up the members details then press Remove from Class. Or locate their record in the list of members attending the class on the right of the screen then double click on them to remove them.

Non Time tabled Class:
After any timetabled classes appears an entry ' Non time tabled class', clicking this opens the non timetabled class screen where you can create classes not on the timetable and add members to them. This is particularly useful for irregular classes such as private lessons.



Alter Instructors:
When a class is initially selected the instructors will be set to those specified in the timetable. To alter the instructors press Alter instructors. You will then be presented with a dialog box to enter the new instructor(s). NOTE: this change will only take effect for this class if you want the change to be permanent you need to change the instructors under timetable update.



Viewing members in Class:
All members in the currently selected class are displayed on the right hand side of the screen. If you select a member in this list their details will be displayed in the member entry section of the screen. For a report on members in the class you can press the use the Instructors Report option to display a formatted report of those in the class.

To obtain more details on member press View Attendance and you will be taken to the "Member Attendance" screen

SMS:
The SMS function here will take you to the multi-SMS screen with all the members in the class shown. A message can then be sent to all the members who attended this class.

Class Role:
If you have a class role (you can assign members to a specific class: see Timetable – Class Roles) set up for this class then this button will display clicking it will produce a Class Role report, which can be used to mark off those who attended the class.

Class Role

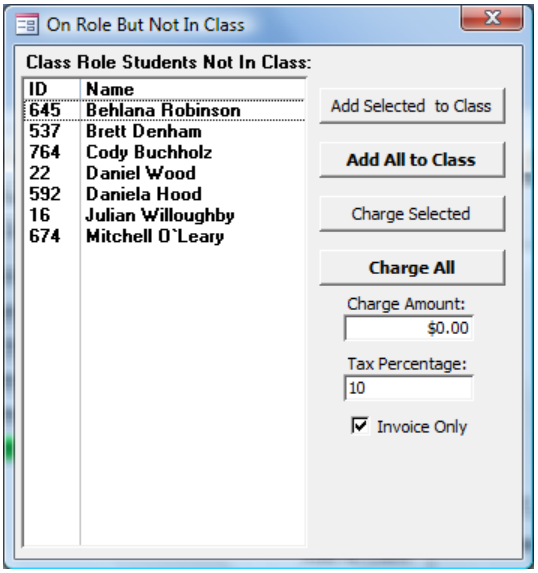
Seido Karate - Grovedale

Graded All *6 :00* *Friday* *Main Dojo*

Grade	*Number*	*Name*	*Age*	*Sex*
Shodan Senior	22	Daniel Wood	22	Male
	16	Julian Willoughby	33	Male
1st Kyu Youth	592	Daniela Hood	9	Female
2nd Kyu Senior	596	Charlie Dimopoulos	41	Male
4th Kyu Youth	645	Behlana Robinson	9	Female
5th Kyu Youth	674	Mitchell O`Leary	13	Male
5th Kyu Senior	537	Brett Denham	15	Male
	764	Cody Buchholz	29	Male

Number Members for Class = 8 *Average age 21.375* *6 Males 2 Females*

Not in Class:
This button is also only present when there is a role for the selected class. Clicking this button will bring up a screen with all those on the role but not in the class.



This screen makes it easy to add members to class who are on role to attend. You can also charge members for the class or charge all members an entered amount, the invoice only option allows this charge to be added to the member as an invoice for payment.

This is used where members are enrolled to attend a specific class and if they don't attend payment is still required (sometimes at an amount less than the regular class cost).

Member Class Entry

(note: the member class entry screen will be removed in a future release as all the functionality it provides is provided by the class entry module.)

FUNCTION: Interface to allow members to record their own attendance.

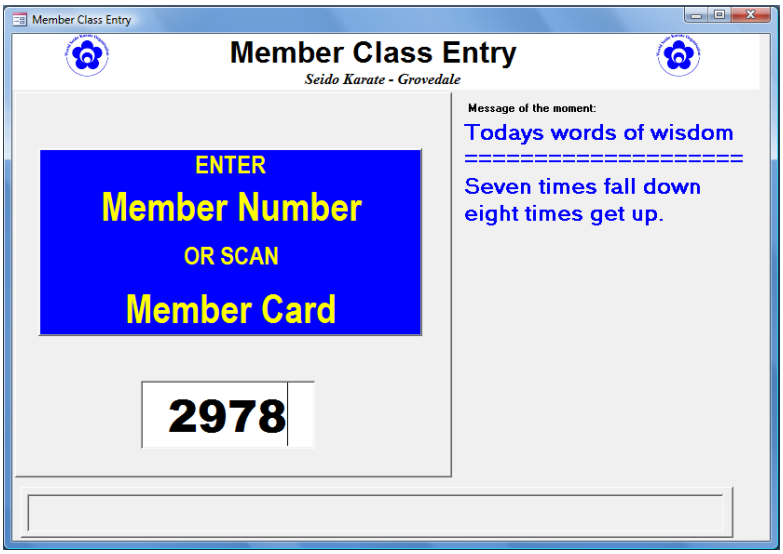
USE: Use to allow members to enter their own attendance-reducing requirement for administrative staff.

This screen operates similarly to the Class Entry module, class entry screen. You should note there are some advantages and disadvantages to using this screen over the Class Entry module.

DISADVANTAGES OVER CLASS ENTRY MODULE

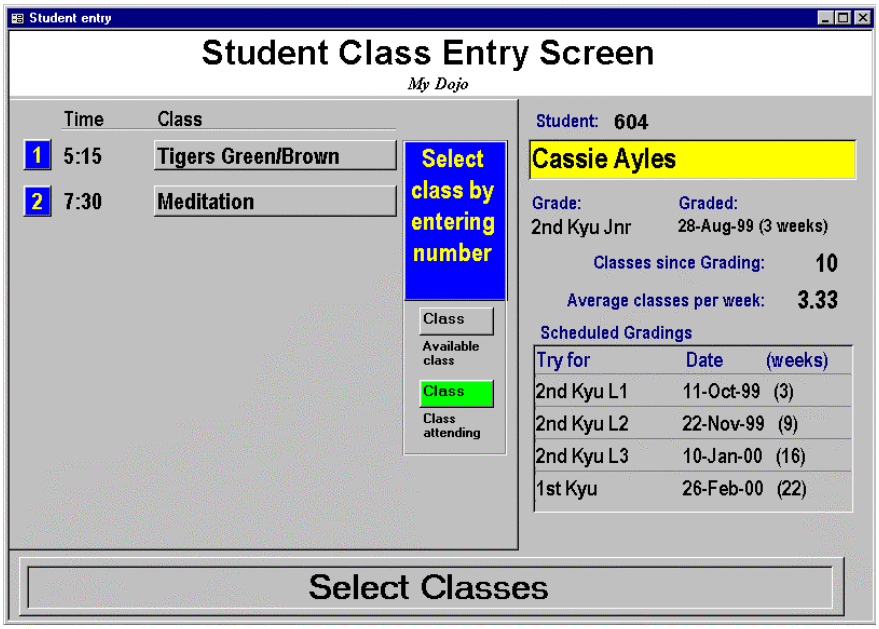
- It does not provide the instructor options of the class entry module.
- It does not have sound feedback option.
- It does not have use of graphics in place of classes' options.
- For large clubs with many members this screen may be slower than the class entry module as it operates directly off the main database, not a summary database.
- The fee-warning screen does not have a lock option.
- You must shut screen down to receive fees etc you do not if using class entry module.

Waiting for Members



When displayed if you have a Message of the Moment loaded this is displayed for all members to see on the right of the screen. The screen will remain in this state until a member card is scanned or a member enters a valid member number and hits enter.

Displaying Available Classes



Once a valid member number has been received this screen will display the members details and the classes they are currently eligible to attend.
On the right of the screen are the classes available for the member

On the left of the screen are the member's details.

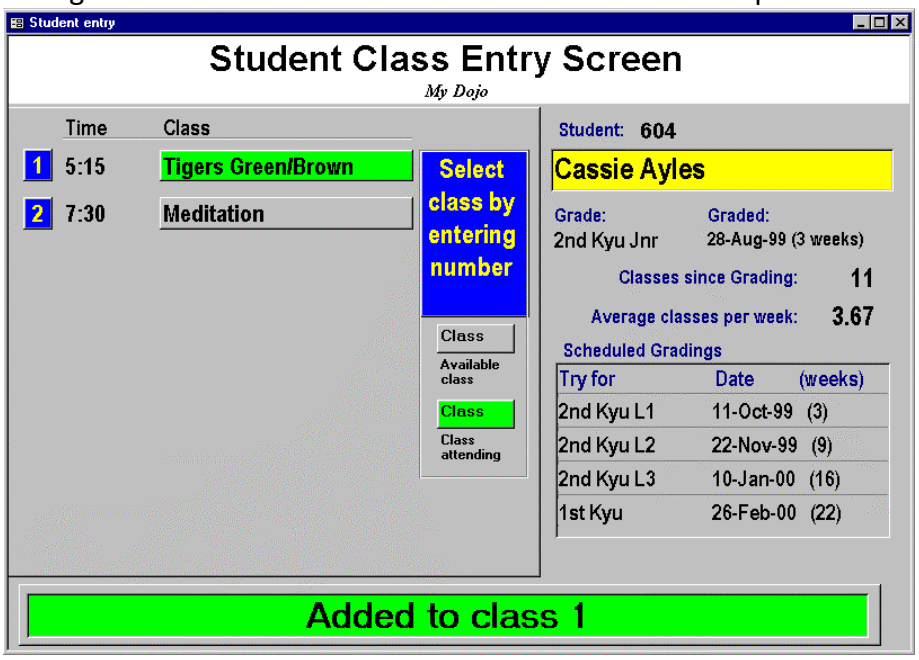
- Starting with their member number, then their name highlighted in Yellow.
- Then their grade is displayed along with grade Level.
- Next to this is the date they graded along with the number of weeks they have been graded.
- Following this is the number of classes they have attended since grading. Note that is the value in sessions that the member has been credited with. As classes can be actually given a value more or less than one.
- Next is the average number of classes they have done per week over the period selected in the Main module. This is only updated when data is refreshed from Main Module.
- If the Show Gradings option is selected following this is a list of the members proposed grading dates (if any). The grade they are scheduled to try for and how many weeks until they are scheduled to try for it.
- If the Show Fees due options are selected then when a members annual fees or affiliation fees are due within a month the date they fall due is displayed, once they are overdue this is indicated and the date colour is changed to red. For training fees the same occurs only they are only shown a week prior to being due. If the Confirm entry/exit with sounds option is selected a sound can be played when fees are overdue also. If the Overdue Fees warning screen is selected then when overdue fees are detected it will be displayed also. For externally received fees when they are overdue a message indicating no payment has yet been processed is displayed.

If a member hits enter, presses an invalid key or another member scans their card / begins to enter their number control is immediately passed back to the screen as it was in the Waiting for Members state.

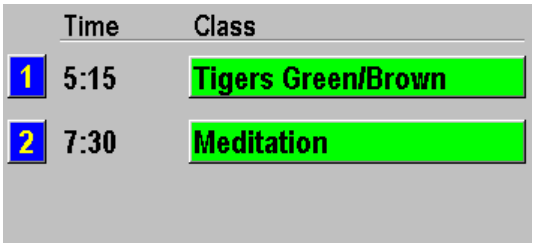
If you have the time out setting set the screen will return to the Waiting for Members state after the specified number of seconds has elapsed from any valid key press (ie class number being entered).

Select Class

To select a class the member must enter the number that is to the right of the class description. When this happens the class will be highlighted in green. A message "Added to class <number>" will be displayed in green and the members' attendance details will be updated.



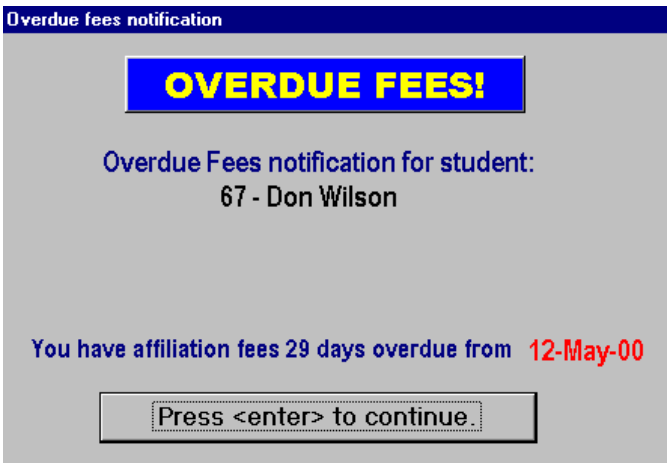
The selected class will remain highlighted. And the member can select additional classes if they are attending more than one. If they select an incorrect class they can remove this selection by pressing that number again. A message will be displayed to indicate it has been removed, the class un-highlighted and the members attendance details changed back.



Note: this some times must be highlighted to members as there are always some members who feel that by adding a class more than once they are some how eventually going to get more than one class credited for it.

Overdue Fees Warning Screen

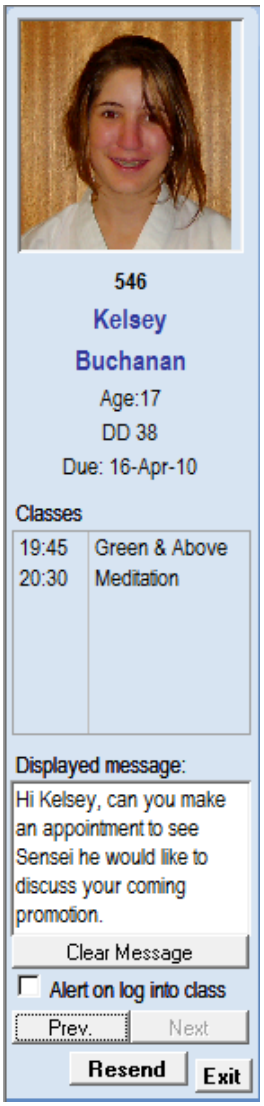
This screen will only be displayed if the "Overdue Fees Warning Screen" option is selected when overdue fees are detected for member.



Monitor Attendance Entry

FUNCTION: Provides visibility of who is signing in.

USE: When this screen is opened in club administrator it will show the last person to sign in at the class entry screen was. This allows desk staff to check people are signing in correctly and to which classes. It also assists with knowing peoples names.



Double click on member picture to open View member screen with their details. Member photo and name will also aid administration staff in being able to deliver a more personal service by knowing peoples names as they come to administration desk. Age, membership description and due date for fees are also displayed for each member.

Classes they sign into are listed.

Any message set up in the view member screen will be displayed in the class entry module. This message is also displayed in the class entry monitor. The message can be updated or removed by clicking Clear Message.

Clicking prev. and Next allows you to browse through the members that have signed in. Anytime a member signs in their record will be displayed.

If you wish to have an alert prompt you when a member logs in then you can check the 'Alert on log into class' check box either here or on the view member screen. The alert sound is set under 'file-options'.

The Monitor attendance screen being open indicates to the system that there is a link to the Class Entry module in place, so when this screen is open any action that creates a receipt will trigger a send to class entry for just that member. The send is done when the receipt screen closes or when a receipt for a new person is created (until then there might be more updates to the receipt still to be done). For large databases particularly a full send can take some time, so this enables member information to be sent and updated individually.

When adding a new member for example any payment received or date adjustment will trigger a send and then you can immediately show the new member how to log in.

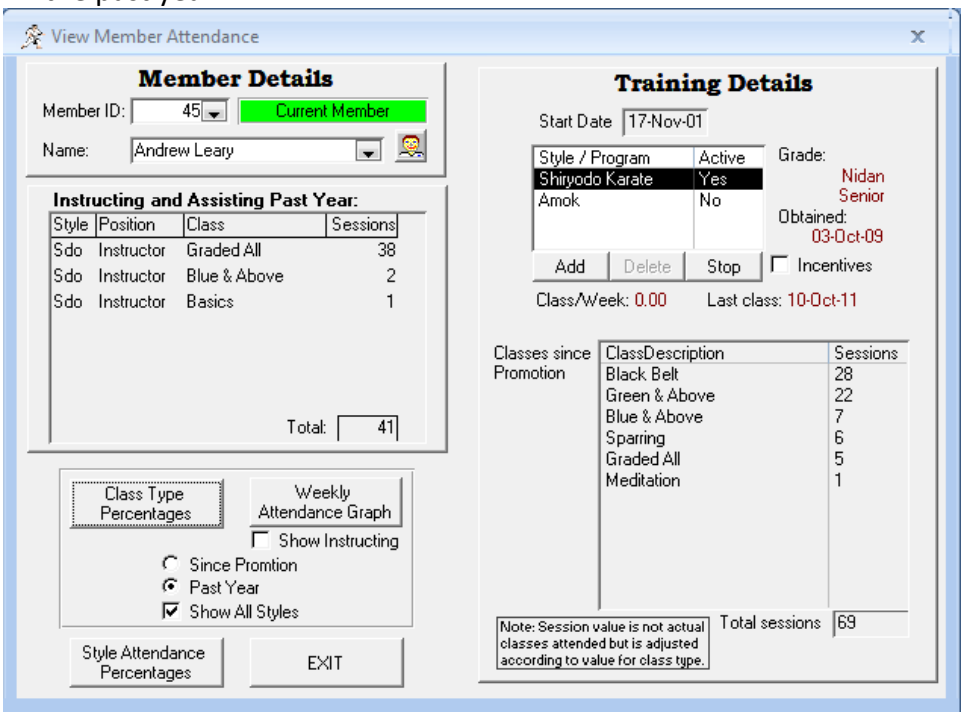
If a member's details are being displayed then you can click resend to refresh their details in Class Entry. This is useful if you wish to update their message or clear it, can also be used when they have been promoted or had a program added to their membership.

Member Attendance

FUNCTION: Provides access to summary information about member's attendance.

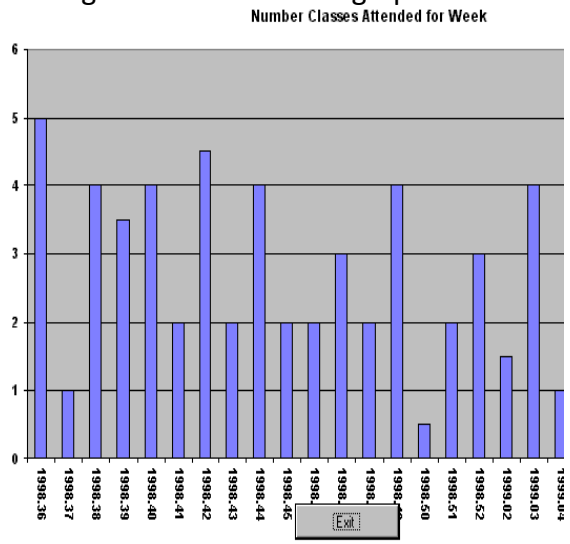
USE: Use this to get details of members attendance patterns, this can be useful in looking at which areas members skills are developing in to assist in either designing a specific program for them or to assist with decisions regarding promotions.

Shows members attendance since they were last promoted and classes they have instructed or assisted with in the past year.

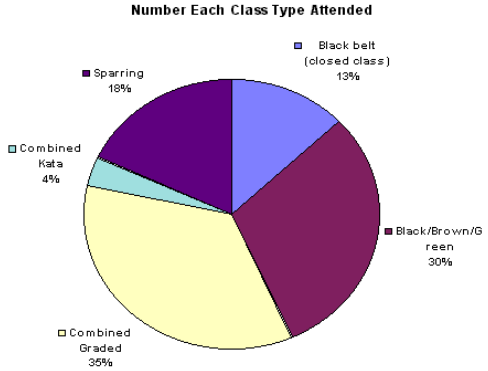


Note: if you use the archive function to remove data from the database Instructing and assistant details are removed but class attendance details will be transferred to unspecified classes.

Weekly Attendance Graph will list attendance over period for each week; legend showing "year.week", so 1999.14 is the 14th week of 1999. If show Instruction is selected then Graph will show instructing and assisting details also on this graph.



Class Type Percentages graphs the percentages of each type of class attended in a Pie Graph.



Class Attendance

FUNCTION: Reports classes and members attending them.

USE: Use this to get a detailed listing of those in past classes if this is required.

Enter various criteria to select class(es) to report on. Report will detail class details, details of members in class and summary statistics of members attending.

Attendance for (12 Weeks / Year / All Programs)

FUNCTION: Shows attendance for each class type by week for "12 Week" report; by Month for "year" report; .

USE: This report provides a snapshot of members' attendance for the past year or 3 months in an easy to examine way to look at attendance patterns, even for large numbers of members at once.

You will be provided with a screen to select the grades that you wish to report on. You can also limit report to only one membership type.

Grade	Student	Since Grading Graded (months)	Classes	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Total for Year	Weekly Average
1st Kyu L1	312 Matthew Buttacavoli	28/04/99 (2)	39	2		6	7	8	10	6	10	8	8	14	9	88	1.73
	273 Dolores Pearson	28/04/99 (2)	42	13.5	12.5	16	8.5	8.5	14.5	9	12	11	9	13	7	134.5	2.64
	274 Rhonda Findlay	28/04/99 (2)	38	6.5	8	13	10	5	13	8	9	11	11	10	6	110.5	2.17
	312 Mary-Ellen Baulch	28/04/99 (2)	35.5	7.5	3	3	4	8	5	6	11	8.5	8	18.5	3	85.5	1.68
	286 Douglas Buttacavoli	28/05/99 (2)	29	6	4	6	9	4	10	7.5	7	8.5	8	8	6	84	1.65

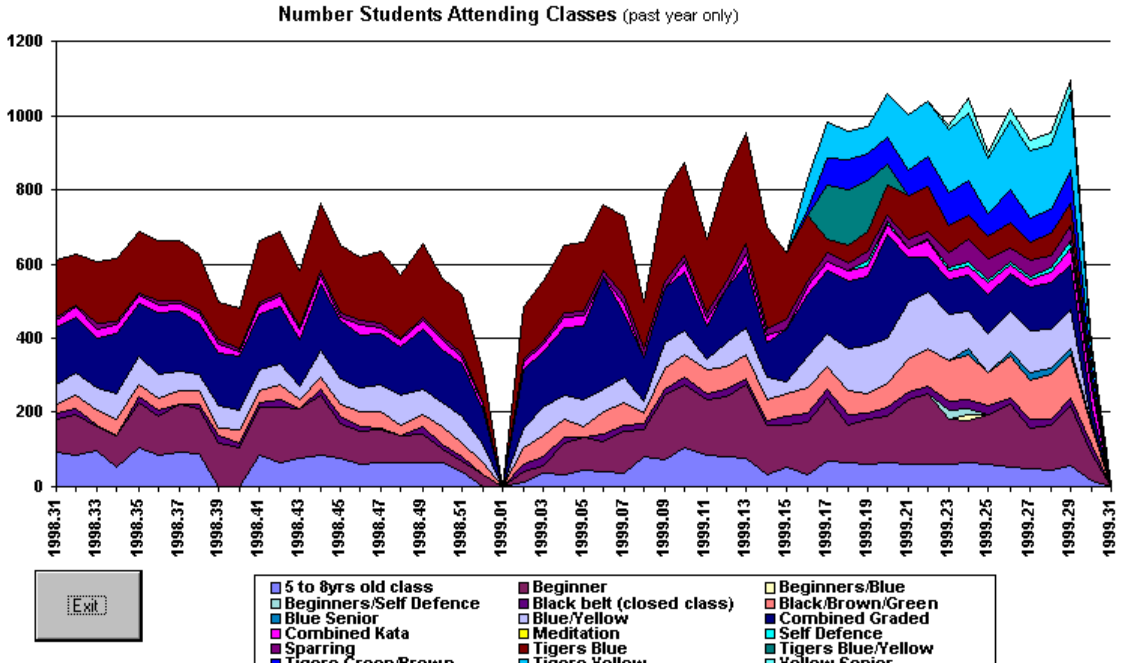
On this report the value of each session type is taken into account. So this is not actually the number of sessions the members have attended but the number of classes this count as for

grading purposes. To get a count of the number of classes set the “Sessions Credit” in “Class Types” screen to 1 for every class type.

Graph Total / Style Attendance

FUNCTION: Displays graph of total attendance for all classes, a specific style or specific class type.

USE: Looking at this graph will show you on a weekly basis if your attendance is increasing or decreasing. This can often be a good indicator of the growth of a club. Often attendance will start to drop before you lose members.



The above graph shows all attendance for a single program over the course of a year. By selecting a specific class type or style you can get a better view of the break down of this attendance. The Graph Style Attendance option gives you a total attendance graph by style without breaking down by Class type.

Attendance recording sheet

FUNCTION: Produces a report containing a matrix with members on one dimension and classes for the week on the other.

USE: If you are not able to enter members at the time of attendance use this report to record their attendance. This will make the whole process easier to record and enter.

Note: this report needs to produce a matrix with the members on one dimension and classes on the other, the processing of data for this is quite complex and as a result this report often does not preview correctly so it’s advised to send directly to printer with no preview. Also note that this report only caters for 20 classes a week.

Instructors + Assistants

FUNCTION: Displays report of Instructors and assistants for a specified period.

USE: If you pay your instructors you can use this to calculate the amount to be paid to them. You can also use it to keep an eye on the spread of the instructing workload between your members.

Instructors and Assistants report

My dojo

from 27-Jun-98 to 27-Sep-98

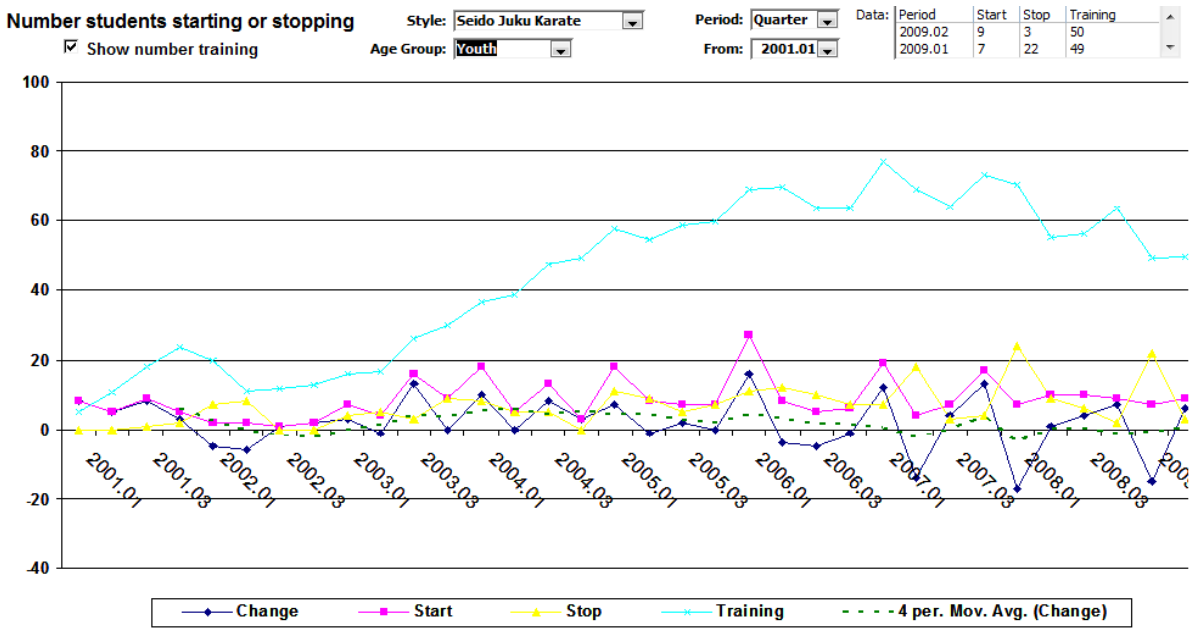
Grade	ID	Name	Instructed	Assistant1	Assistant2	Total
Style / Program:		*Seido Juku Karate*				
Sandan	132	Trent Murray	34	0	0	34
	103	Lisa Oswald	5	0	0	5
	121	Pat Marven	4	0	0	4
		Totals for Grade	**43**	**0**	**0**	**43**

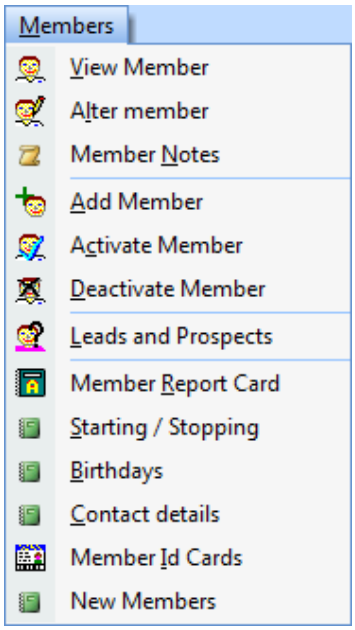
Enrolment Numbers / Percentages / Leaving by Grade

FUNCTION: Display graphs of members enrolment information.

USE: Here you can see at a glance: Your current enrolment, how many members have enrolled and how many have left each month / quarter as a number or percentage, or see how many members are leaving for each level.

In order to display this information Club Administrator needs to scan through the database and for each month calculate how many members where enrolled based on their start and stop records, this can take some time so you are prompted if you would like to calculate this when you open this report.


Number students starting or stopping
Show number training
Style: Seido Juku Karate
Age Group: Youth
Period: Quarter
From: 2001.01
Data:
Period Start Stop Training
2009.02 9 3 50
2009.01 7 22 49
100
80
60
40
20
0
-20
-40
2001.01
2001.03
2002.01
2002.03
2003.01
2003.03
2004.01
2004.03
2005.01
2005.03
2006.01
2006.03
2007.01
2007.03
2008.01
2008.03
Change
Start
Stop
Training
4 per. Mov. Avg. (Change)



Member menu

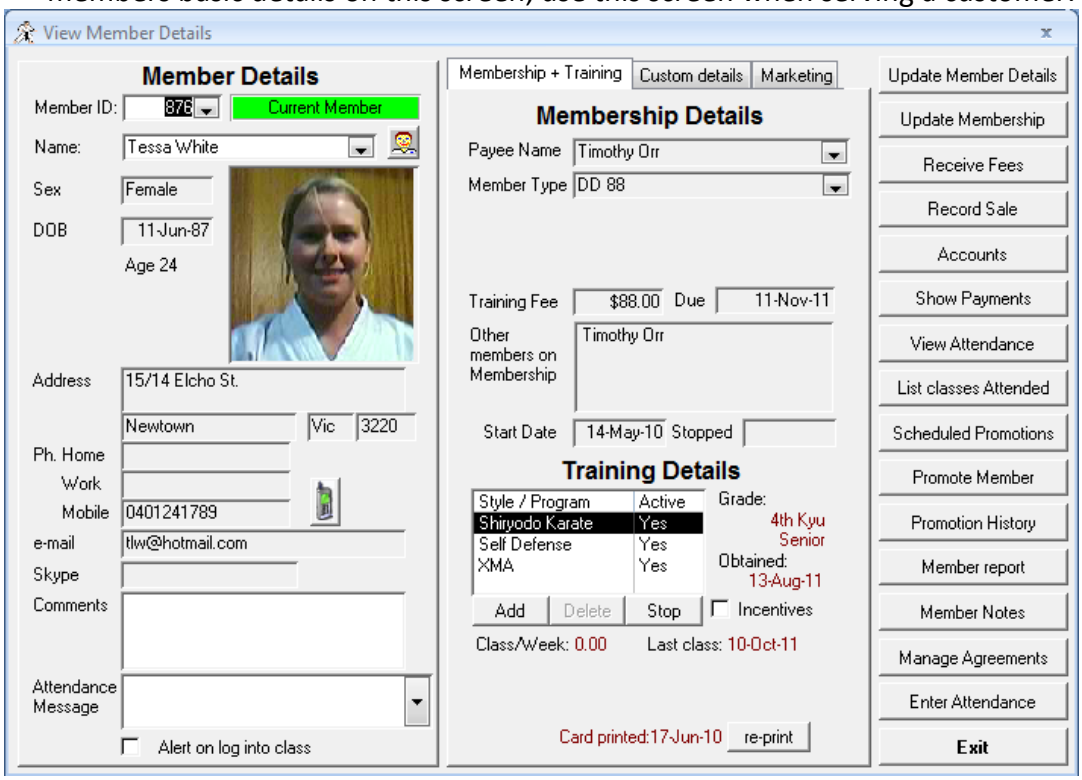
The functions under the Member menu give you the ability to enter and maintain member records.

This includes reporting on members' basic details and producing member cards.

View Member

FUNCTION: Displays members' details as well as providing a central screen that other functions related to members can be accessed from.

USE: If you are dealing with a members for anything you can do it through this screen, make sales, receive fees, schedule grading dates and other functions are all available from this screen. This gives you the ability to quickly go from one function to another with out needing to locate member record again. At a quick glance you can see all a members basic details on this screen, use this screen when serving a customer.



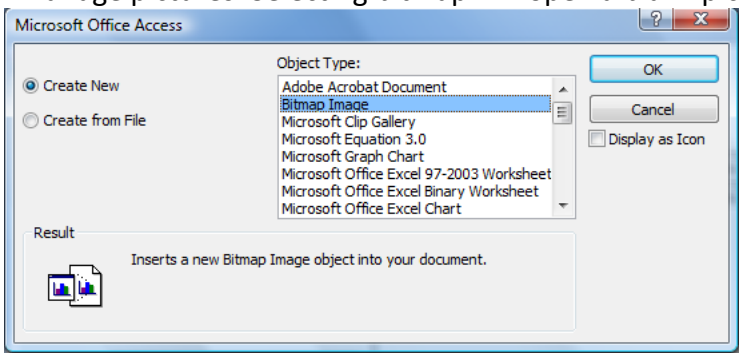
Insert / edit pictures

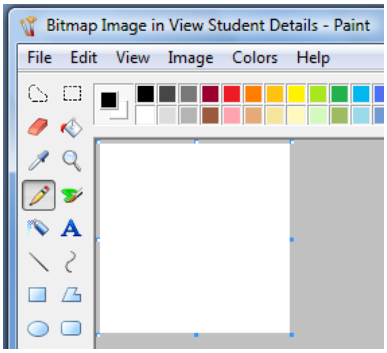
To insert a picture click in the “Click to insert picture” box.

There are several ways to insert pictures.

- **Using Microsoft Photo Editor:** to use this select Photo Editor as the default tool to insert pictures. Go to "File - Options" and select the "Member Pics" tab. Check the Use Microsoft Photo Editor to edit member pictures option. (Note: This is the simplest way to manage inserting photos however Photo Editor was replaced by Picture Manager in Office 2003, this does not provide an interface that can be used for inserting pictures. If you have a version of Office prior to 2003 you can install just the photo editor.) If you have office installed but not Photo editor do the following:
    - Go to "Start - Settings - Control Panel" Or In Windows XP, choose "Start - Control Panel".
    - Use Add Remove programs option.
    - Select Microsoft office and update install.
    - Locate Microsoft Photo editor and install it (this is under accessories).

- **Using Another program:** Unselect Photo Editor as the default tool to insert pictures. Go to "File - Options" and select the "Member Pics" tab. Uncheck the Use Microsoft Photo Editor to edit member pictures option. If you have the view member screen open close it and reopen it. When you now select yes to insert picture you will be given a list of objects / programs to use to insert. Select 'Bitmap Image' or the type / program you wish to use to manage pictures. Selecting bitmap will open a blank picture in windows Paint as shown.





In Paint select “Edit - Paste from…” then locate the picture you wish to load. Once the picture loads click off the picture to complete the paste process then select “Image – Resize/Skew” and resize the picture to be the appropriate size.

- **Paste from Clipboard:** The third option is to paste from the clipboard. Start the program or utility you wish to use to edit / manage member photos. Copy the image to the clipboard using the cut / copy function within the program. Open the view member screen, right click in the picture area then hold the <shift> key and press <Insert>.

NOTE: ensure you reduce member pictures to the size of the box they insert to or they will make your database grow very quickly. A correctly sized picture will change size only marginally if you click on it once inserted.

Comments

If there is information about a member you wish to store or need to remember enter it in the comments field. There is no limit to the length of messages in this field, to expand these comments double click in the comments box. If you keep detailed training plans or other information in a standard format you can set this up in a standard document then copy it to club administrator or copy from another members record (<ctrl> C to copy <ctrl>V to paste).

Attendance Messages

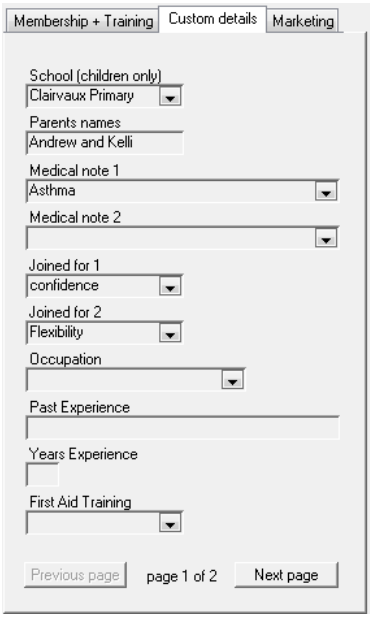
If you wish a message to be displayed when a students attendance is recorded (either by the class entry module or attendance entry). Enter this message in the Attendance message box. Standard messages can be stored that are then available from the drop down list. These can be added to or edited by double clicking in the attendance messages entry box. Note: if you select a standard message and then change it this will not alter the standard message.

Alert on log into class

Selecting this option will cause an alert sound to be played when the member logs in using the class entry screen. If you have the Entry Monitor open their record will also turn red. This allows desk staff to be alerted when a member they need to see attends.

Training Details

For the "Multi Style / Program editions of this application show you see a list of the styles / programs that this member is a member of. For active members you can add or remove from this list as required. Shown is the format displayed in versions that do not cater for multiple styles / programs.



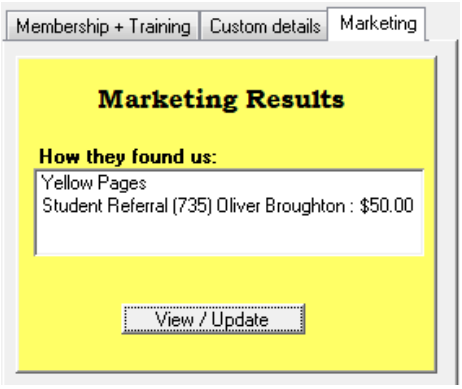
Custom Details

In Club Administrator you can set up as many custom fields as you require to store details about members. To set these up see 'Housekeeping-Customize'.

Clicking the custom tab shows all the custom fields set up for members. You can then enter this information for the selected member.

If there are more than 10 custom fields set up click next page to see the next 10.

Marketing



Tracking how people find you is critical in any member based organization. The marketing tab shows / allows you to enter / maintain, how people found you.

If they indicated more than one source these can be stored. Where they have been referred by a member the member can be recorded and if a referral payment was made this is also displayed.

Available Functions

Update Member Details takes you to the Alter member details screen.
Update Membership takes you to the Update Membership details screen.
Receive Fees takes you to the Receive Training Fees screen.
Record Sale takes you to the Sale screen so that stock can be sold to selected member.
Accounts take you to the Accounts screen where member accounts are managed.
Show Payments takes you to the Payments by Member screen where all payments by member are reported.
View Attendance takes you to the Member Attendance screen where you can check members' attendance.
List classes Attended displays report of all classes member has attended within entered date range.
Scheduled Promotions takes you to the Scheduled Promotions screen, to manage members promotion schedule.
Promote Member takes you to the Promote member screen.
Promotion History takes you to the Promotion History screen to view / edit promotion history.
Member Report formats a member report for the selected member.
Member Notes takes you to the Member Notes screen for the selected member.
Manage Agreement Opens the Manage Agreements screen for the selected Member.
Enter Attendance Opens the Attendance Entry screen for the selected Member.
Print now / re-print this opens the Member Cards screen with the current member number loaded ready to print.

Alter Member Details

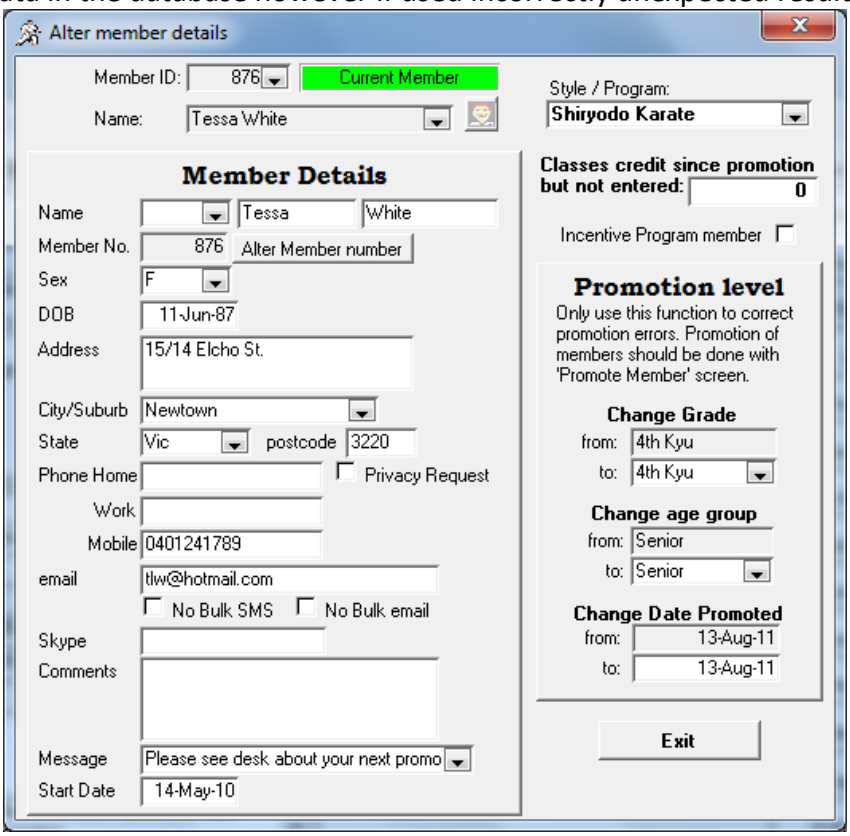
FUNCTION: Provides ability to update member details including promotion level details.

USE: Perform updates to members' records as required. Correct errors in promotion level. If you have a program where members can go up and down grades then perform these updates from here also.

Displays Members details. If entered directly from Menu then Member number or name can be entered. This provides the ability to alter the members' contact and other general details; data entered is validated as when member is first added in Add Member.

Also provided is the ability to alter the members Grade, Age Group and Date Last Graded. These functions are designed to be used to correct errors in adding members or Promoting

members. You should use the promote member screen to promote members. These functions will correct related data in the database however if used incorrectly unexpected results may occur.



Add member

FUNCTION: Adds Members to database.

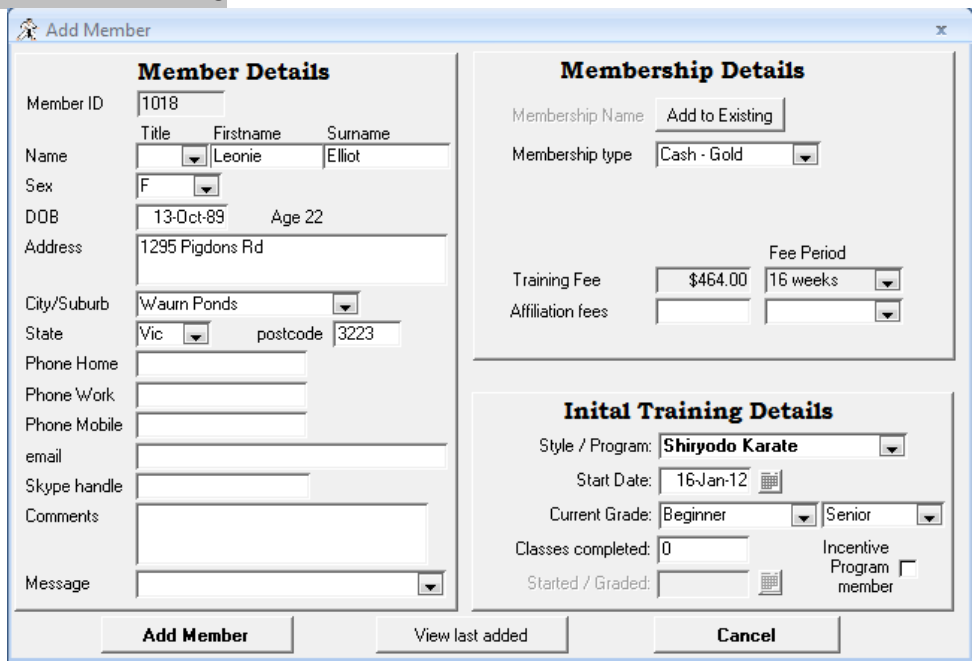
USE: Enter new members to add them to Database.

To add member following fields must be entered first: other fields are optional:
Member Details – Name, DOB and Sex.
Membership Details – You must enter the membership type unless you are adding the member to an existing family membership in which case you click the "Add to Existing" button then select the from the provided list the primary person on the membership you wish to add them to.
Initial Training Details – Start date, this date will be used for fee as well as training purposes. However the date fees fall due can be altered later so this should be their initial training date. The current grade can be altered from beginner, if it is the grading date should also be entered.

Once you complete the details on this screen Click "ADD STUDENT". You may now be presented a couple of screens:

- If in the 'file-options-marketing' tab you have checked to use marketing screen when adding members this will be presented to you first to select the lead source(s) for this member.
- If the member is on a Contract payments membership you will be presented with the Enter Contract screen prior to the receive training fees screen. You will now need to generate their payments by clicking Generate payment due dates after checking details are correct.

- The "receive training fees" screen. You can alter the dates that the members fees fall due if this is required and receive any initial payments. If the member is on an external payment membership type initial training fee payment can be received by clicking "OVERRIDE EXTERNAL PAYMENTS".



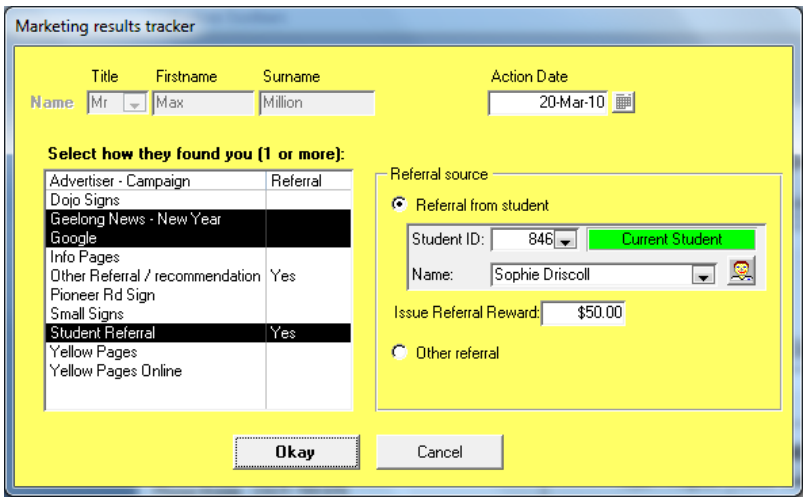
If you wish to alter the details of this member further or simply check that all looks correct for this member click "View last Added" once you are returned to the initial Add Member screen and you will be taken to the View Member Details screen.

Marketing – lead sources

FUNCTION: Record lead source for all new members being entered into database.

USE: To determine the effectiveness of various types of marketing and advertising it is important to track how people find you. This screen will enable you to track this information so it can later be reported on and examined.

This screen can not be opened directly, go to the view member screen and select the marketing tab, then click view/edit. Or if in the 'file-options-marketing' tab you have checked to use the marketing screen when adding members this will be presented to you first to select the lead source(s) for this member.
In this screen select the lead source(s) from the list, these can be maintained via the 'Finance-Advertising Types' screen.



If a Member Referral is selected then you can also enter a referral reward. A referral reward account will be created automatically if the member

does not have one and this amount credited to it. This amount will then be recorded as an advertising expense also.

Activate member

FUNCTION: Activate deactivated members and used to shift members to family memberships.

USE: When a member recommences training use this screen to re-activate their old record.

This screen allows members whose membership has been deactivated to be reactivated. Normally a member is deactivated if they stop training and their membership has expired.

To reactivate a member, enter their number or name. Then check all details are correct as per Add Member screen. When member is reactivated various screens will be displayed to allow receiving of fees, update of memberships/ contracts and so on as required the same as for adding new members.

In order to combine two or more members onto the one membership where they have existing separate memberships you need to deactivate the members to be added to the existing membership, and then reactivate them with this screen adding them to the existing membership.

Deactivate Member

FUNCTION: Deactivated members who are no longer training, used to shift members to family memberships also.

USE: When a member stops training and are not expected to make any payments use this screen to stop their membership.

This screen allows members whose membership has expired that no longer train to be deactivated, there by no longer being reported on. Likewise members can be removed from family memberships via this screen if they are no longer training or required to go onto a separate membership.

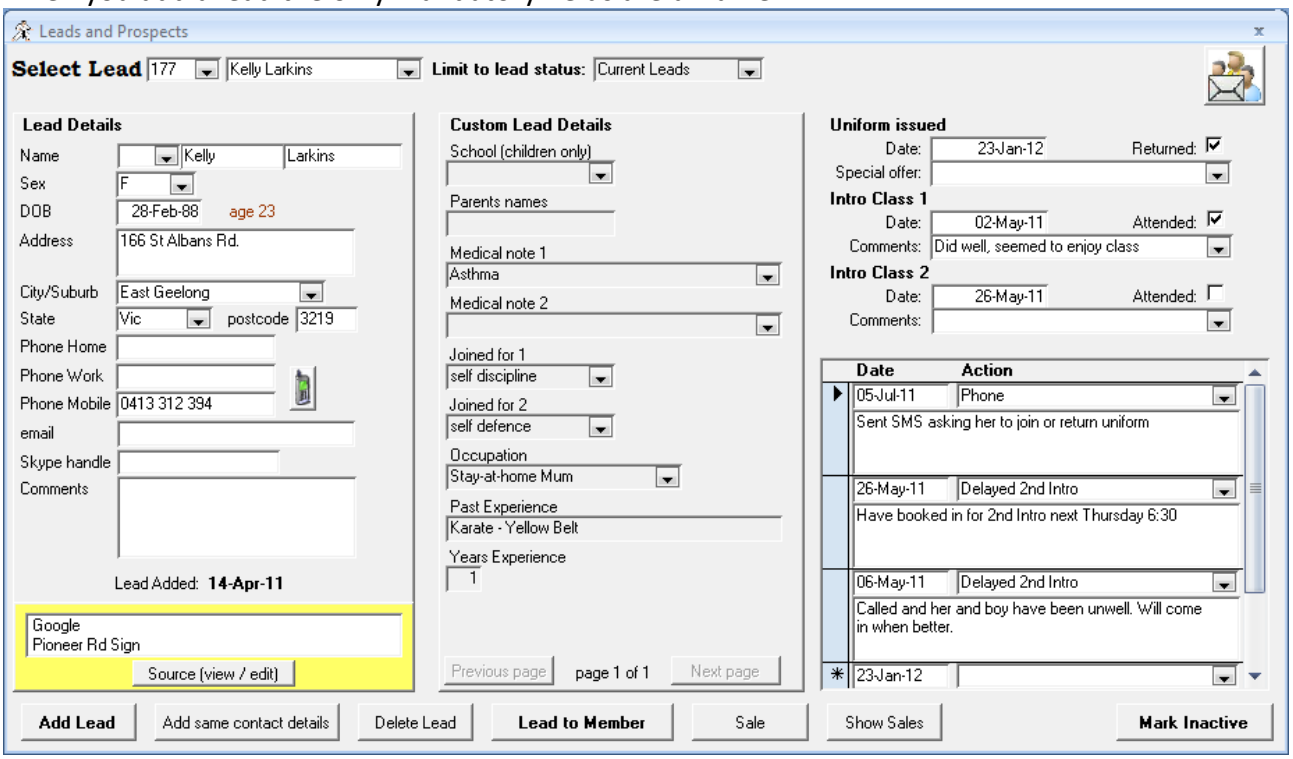
To deactivate a member, enter their number or name. Then click De-activate Member.
Note: if they have any contract payments remaining these will be removed, so this should not be done while payment for these is still being sought. If they are no longer training but still have payments to make their membership should be suspended instead.

Leads and Prospects

FUNCTION: Enter and track prospective members.

USE: If you receive an enquiry or have a member referred to you then capture all their details in this form.

When you add a lead the only mandatory fields are a Name.



The Custom Lead Details fields can be added / updated using the Housekeeping – Customize form. When using the Lead to Member function if a field in the Custom Lead Details matches a field in the custom member details it will be copied across.

The Final column of information, events and notes are used for tracking events or recording information in regard to leads. This information is not copied to the member record.

To add a new lead just click Add Lead then enter leads information in the lead details section or select an existing lead and click Add Same contact details to enter a lead with the same contact details.
To remove a lead select them and then click Delete Lead. When you delete a lead if you have recorded lead source information then this information is retained and can still be reported on. If for some reason you did not want to retain this information eg. a lead had been entered twice, then before deleting the lead remove this by editing the source and unselect all sources.

If a lead becomes a member you can click Change Lead to Member and all their information will be copied over to the member record. Once you have added the member you will be given the option to delete the lead. If you set up Custom data fields for you lead with the same description as those set up for your members then this information will be copied across.
To set up custom fields go to “Housekeeping – Customize”.
If the follow ups and comments section you can make notes about the lead and any actions that have been taken.

Sale – Clicking the sale button with allow you to record sales against the lead, using the standard sales form. Note: if you supply free uniforms to people doing trial classes you can record these by entering the sale but with a $0 cost. This will ensure your stock is correctly tracked and also enable these to be recorded as a cost when looking at advertising costs, all sales recorded against leads act as income or expenses in addition to other advertising costs, if you do not want these treated

this way enter them in the sales form with no member, or only enter them once the lead is converted to a member.

Show Sales – Will show all sales that have been recorded against a lead. When the lead is converted to a member these sales are kept with the member. If the lead is deleted these will still show the lead number in the receipt but will not be associated with any thing else.

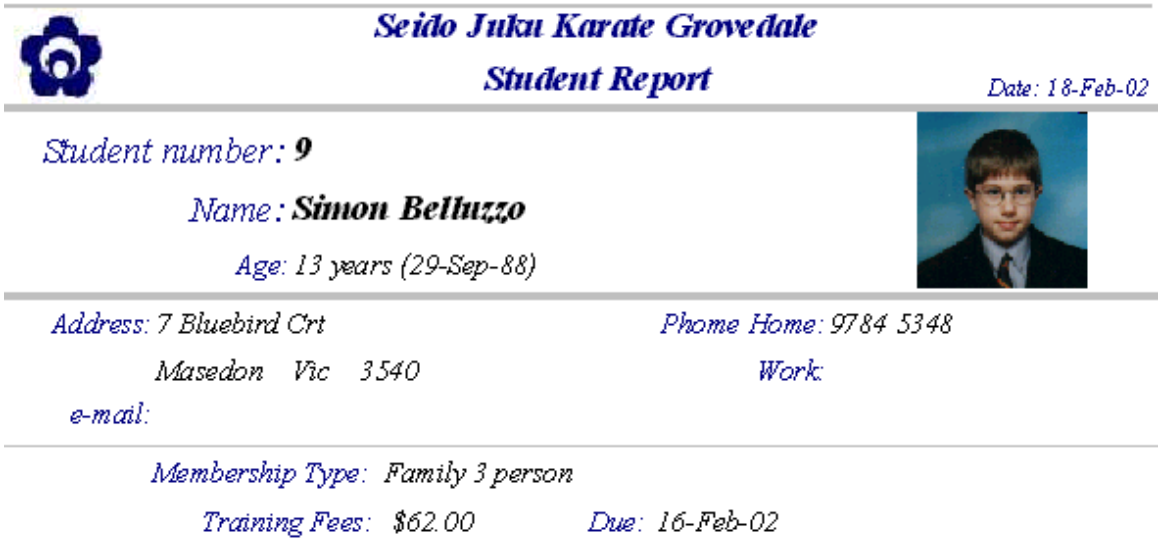
Member Report Card

FUNCTION: Displays detailed member report.

USE: Member report provides a detailed summary of important aspects of members training, attendance, fee status, assisting and what class's member is attending all on a single report. In this way you can have all the information you need about a member in front of you even if you do not have the computer with you. Use report to assist in promotion decisions, to issue to member and discuss their progress with them.

Report Sections:

1. Header
   Club & date, member name, number, age and photo if available.
   Members Address and other contact details followed by membership type and fees and dates.



2. Training details (this section will be repeated for each style / program a member is attached to)
   Style / Program name. Members' promotion level and attendance for this level.
   Graph of members' attendance for past year.
   Break down of attendance by Class Type, Instructor and record of assisting.

Seido Juku Karate Gr

Grade: 2nd Kyu Junior

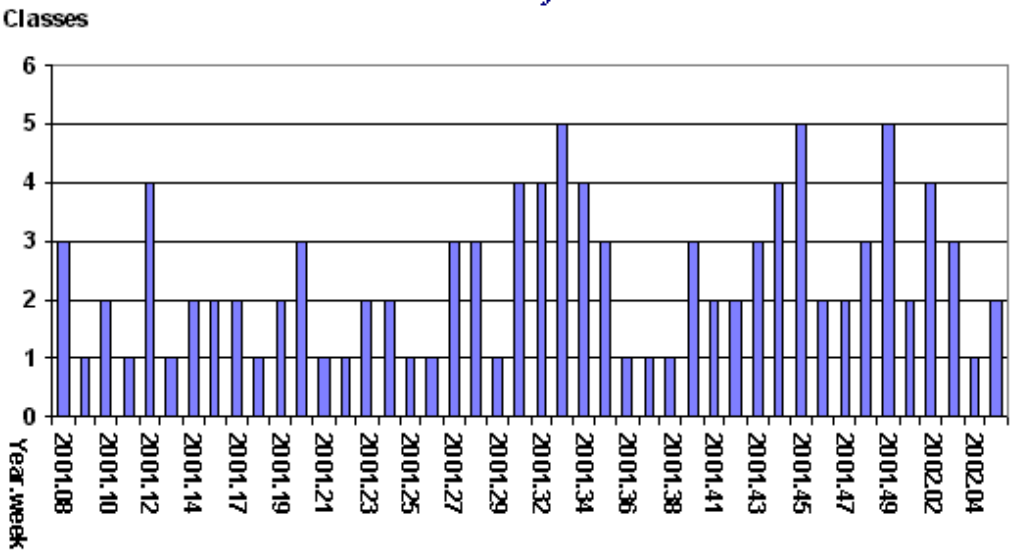
Date Last Promoted: 19-Aug-01

Last Attended: 02-Feb-02 — Average weekly attendance: 1.38

Weeks since Promoted: 26 — Weeks required to Grade: 24

Classes Since Promoted: 53 — Classes required to Grade: 60

Attendance Record for Past Year



Class type	Sessions
Junior	46
Combined Graded	38
Sparring	12
Tournament	2
Seminar	2
Demonstration	2

Instructor	Sessions
Malcolm Ayles	97
Michelle Ormrod	7
Allan Lambert	1

Teaching role	Classes
Assistant 1	1

Starting / Stopping

FUNCTION: Displays details of Members stopping and starting.

USE: Report shows those who have started and stopped along with the program(s) they where in.

Date	ID	Name	Sex	Age	Membership type
Members returning to training					
16-Feb-02	254	Sally Wright	F	10	Member
	Styles / Programs:	Seido Juku Karate Junior Demo team			Grade - 8th Kyu Junior
New Members Starting					
30-Jan-02	52	Ryan Dean	M	10	Member
	Styles / Programs:	Seido Juku Karate BJJ			Grade - Beginner Junior Level - Beginner
09-Feb-02	53	John Jones	M	35	Concession
	Styles / Programs:	Seido Juku Karate			Grade - 3rd Kyu Senior

Members started: *2*	***Members returned:*** *1*	***Members stopped:*** *0*

If you limit the report to only 1 Style or program only that program and members joining / leaving it will be displayed.

Birthdays

FUNCTION: Displays detailed member report of birthdays for selected month.

USE: Use to track those who are having birthdays. You can then send birthday cards or simply wish member's happy birthday.

Birthdays for February

Seido Juku Karate Grovedale

Ages at 01-Mar-02

Day	ID	Name	Age	Birthdate	Sex
1st	36	Peter Kingston	49	01-Feb-53	M
		Styles / Programs: Seido Juku Karate		Grade - Beginner Senior	
	53	John Jones	35	01-Feb-67	M
		Styles / Programs: Seido Juku Karate		Grade - 3rd Kyu Senior	
4th	33	Matthew Yeatman	8	04-Feb-94	M
		Styles / Programs: Seido Juku Karate		Grade - Beginner Junior	
5th	50	David McIlroy	42	05-Feb-60	M
		Styles / Programs: Seido Juku Karate		Grade - 4th Kyu Senior	
25th	42	Niamh Harrington	8	25-Feb-94	F
		Styles / Programs: Seido Juku Karate		Grade - 7th Kyu Junior	

Number birthdays for month: *5*

Contact details

FUNCTION: Produces report of contact details of members.

USE: Use to quickly and easily produce reports of members contact details. If you have multiple programs this can be limited to a program. Can be produced with or without member addresses and comments on members.

Member contact details

Seido Juku Karate Grovedale

Style / Program: ***Seido Juku Karate***

ID	Surname	First name	Sex	DOB (age)	Grade	Home	Work
1	Ayles	Malcolm	Male	14-Jul-66 (35)	Snr Nidan	52451499	52463481
		55 Sherbert Street Belmont Vic 3216					

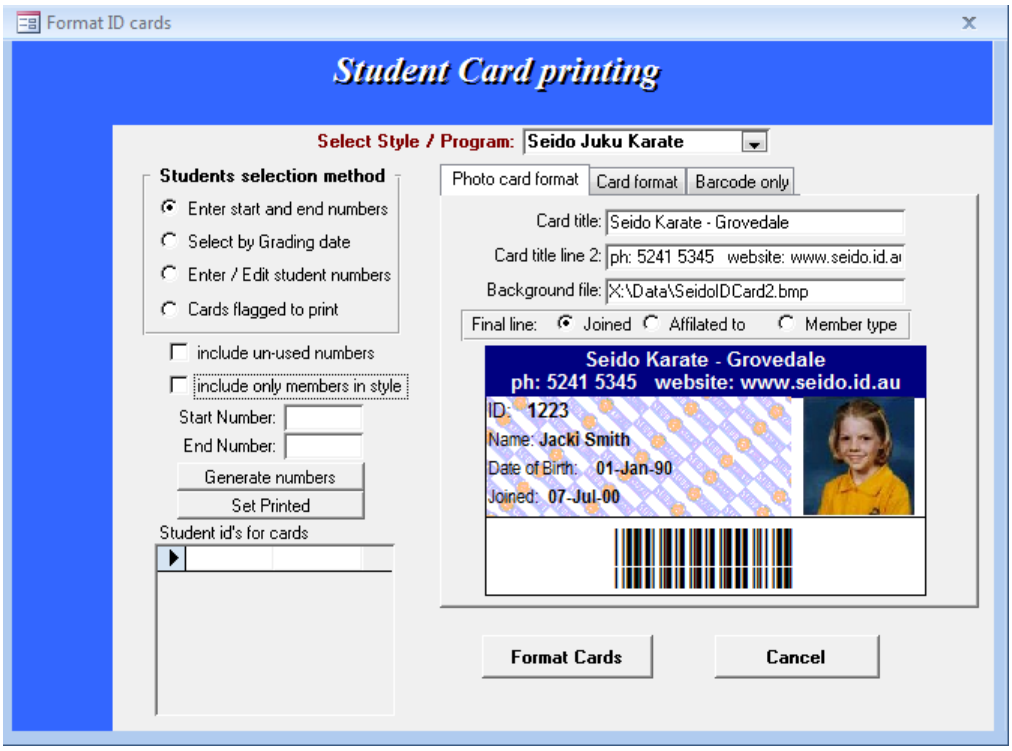
If this report is not the exact format you want or does not have exactly the details you are after try producing a custom report. There is a sample member contact details report supplied that you can update.

Member Id Cards

FUNCTION: Provides ability to produce member cards. These can be done in several formats.

USE: The member cards produced can serve several purposes.

- Cards with barcodes are used for members to scan to enter classes.
- Record fee payment details on back of card and have member bring card when paying fees.
- If members are able to obtain discounts from supporting businesses then use this for identification.
- Place school phone number on card to ensure members have easy access to your number.



When producing member cards the first task is to select the members you wish to have cards printed for. There are several options for this:

- Entering a number range then click Generate Numbers.
- Enter a grading date then Click Generate Numbers for everyone who graded on a day.
- Directly enter them in the list
- Use the cards flagged to print option, when a member is added they are flagged to have a card printed, you can use the reprint option on the view member screen to flag them to be printed at any time.

You can generate Member ID cards with the use of 4 different formats. For the photo card format shown above you can customize the information displayed. You can enter anything you wish for the first 2 lines of test. Then the final line of the members' details can be their date joins, Affiliation details or Membership type. In addition to this you can include a background file, which will appear behind the members details as a watermark.

The other formats are much simpler. Format 2 & 3 are shown along side here. There is a no-barcode variation of this also which has a similar format to the photo card without the photo. Format 4 only prints the bottom section of the card, with the barcode, members name and number.

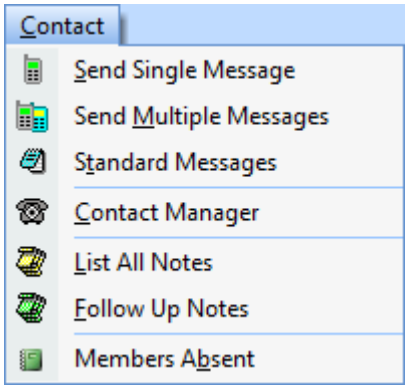
Note: If you are going to be operating a scanning system, before you begin producing your member cards you will need to check the scanner output format and decide on an appropriate barcode set-up, entering these details in the Scanner Set-up option under the Housekeeping menu (see Class Entry module guide for more details).

If Barcodes are displaying as numbers:

- Choose "Start - Settings - Control Panel" Or In Windows XP, choose "Start - Control Panel".
- Select the Fonts option.
- Choose "File - Install New Font".
- Locate the font file “3of9Barcode.ttf”, this will be in the folder Club Administrator was installed to, normally “C:\ClubAdmn\”.

Once member cards have been printed click Set Printed to record date of print.

Note: You can enter this screen directly from the view member screen by selecting the print or re-print button there if you enter this way the selected member will automatically have the last printed date updated.



Contact menu

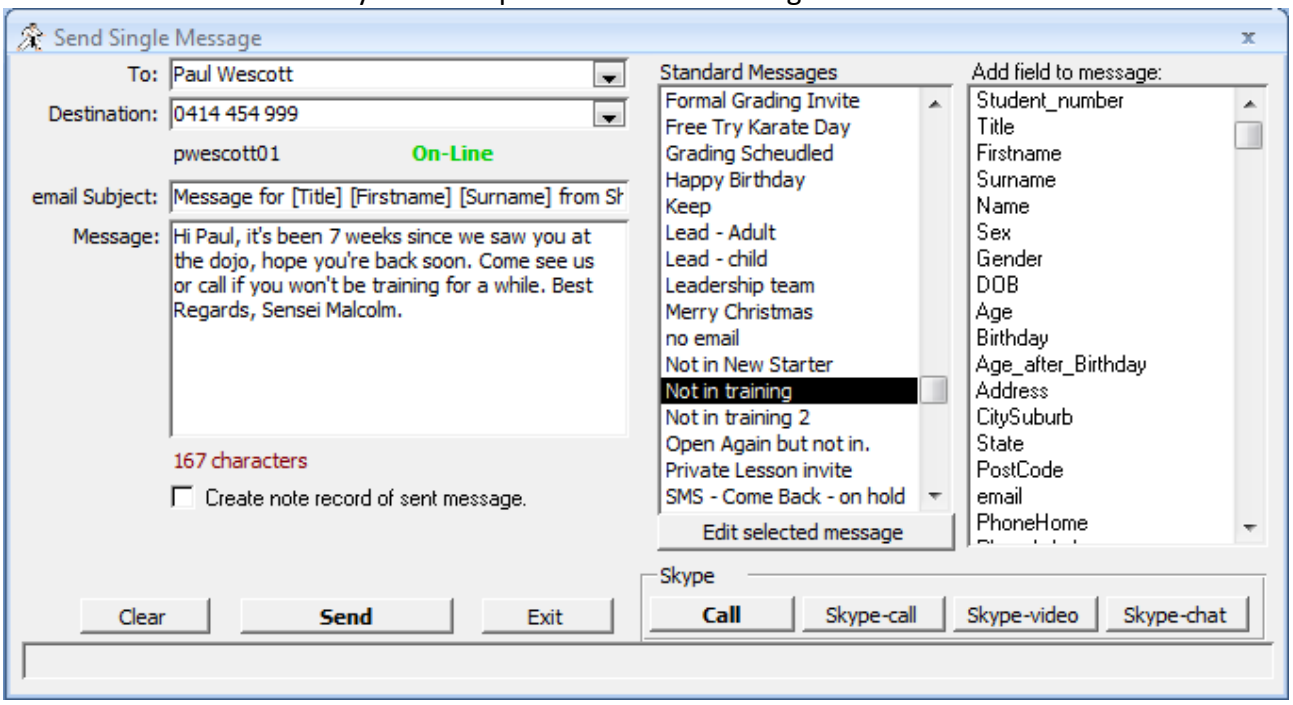
This menu provides access to functions specifically designed to facilitate contact and track contact with members.

Send Single Message

FUNCTION: Send a Single message to email or a mobile phone.

USE: Use this screen to send email and SMS messages to your members. Note: to send sms you must have a message net account to use this function. Go to www.fullcontact.com.au for more details.

You can select a contact, their number or email from the list provided or alternately you can enter any number to send to. You can use standard messages or type your own, adding any of the member information fields you like to personalize the message.



When you select an email address you will have additional options to attach a member report to the email (see Member-Member report card) for more details, it will also give you the option to open the email before sending.

Send: if an email address is selected this will send the message as an email otherwise this will send the message as an SMS, either through SKYPE or Messagenet depending on the options configured.

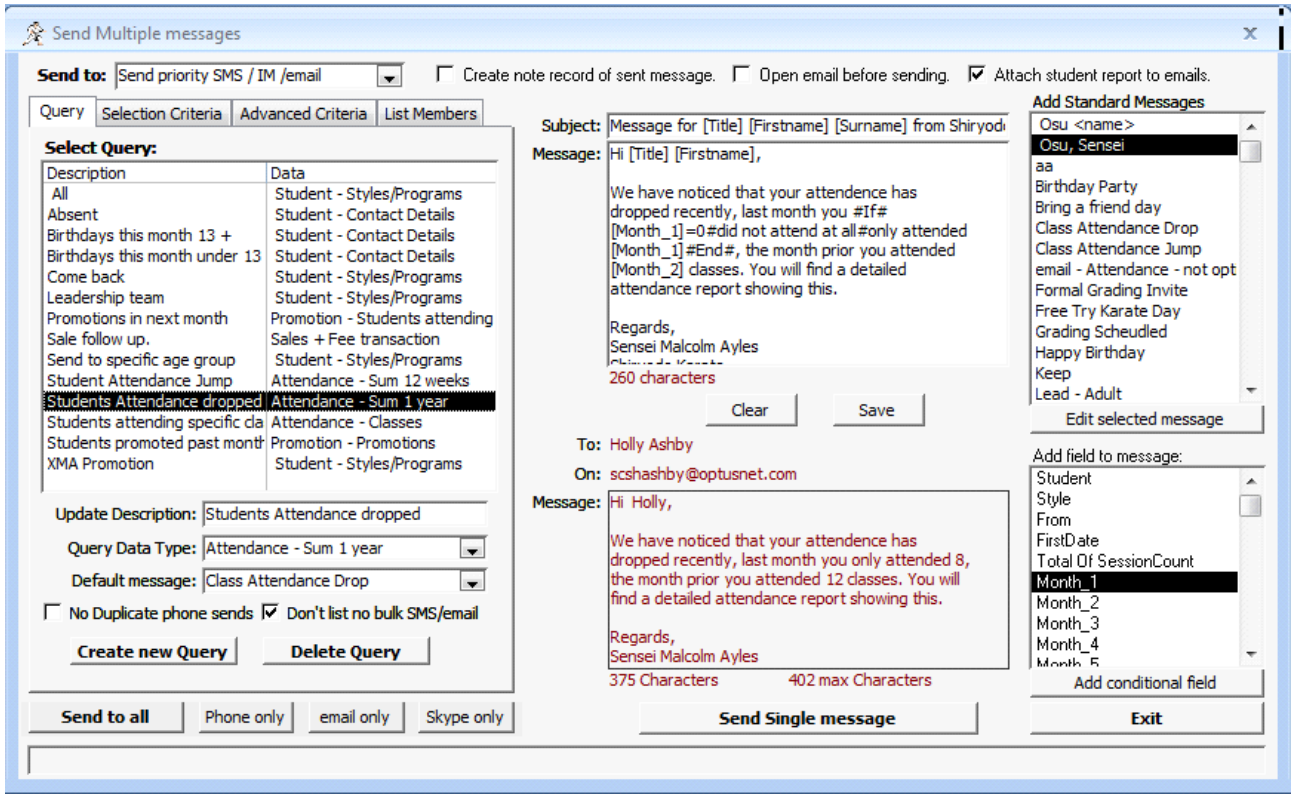
Call: Only available with Skype, this will initiate a call to the selected phone number.
Skype-call: This will start a skype call with the listed Skype handle.
Skype-video: This will start a video call with the listed Skype handle.
Skype-chat: This will send the message as a Skype IM. If no message is entered it will initiate a IM session with the selected user.

Send Multiple SMS

FUNCTION: Send messages to a group of people by SMS, IM or email.

USE: Use this screen to send messages to your members. Note: to send SMS or IM messages you must have Skype or a message net account.

The first step in sending a multiple messages is to select the people you will be sending it to. On the initial query tab you will find some standard messages that you can use, you can create new ones or remove any of these you do not require. Once you select the message type you are going to use then you can add any selection criteria, from the standard criteria available for most selections or if you have some SQL knowledge you can use the advance criteria to set up your selection criteria.



Next click the list members tab and all the members will be retrieved. You can send messages by email, as an SMS to a mobile phone or as an IM to a Skype Handle. Select how you would like to send the message from the "Send to" drop down (note: you may want to use different messages when sending to email and phones). The members who are going to receive messages are now listed along with either the phone and email or Skype handle the message will go to, if you want at

this point you can remove members by selecting them and hitting the Delete key on your keyboard.

In the message field enter the message you wish to send:

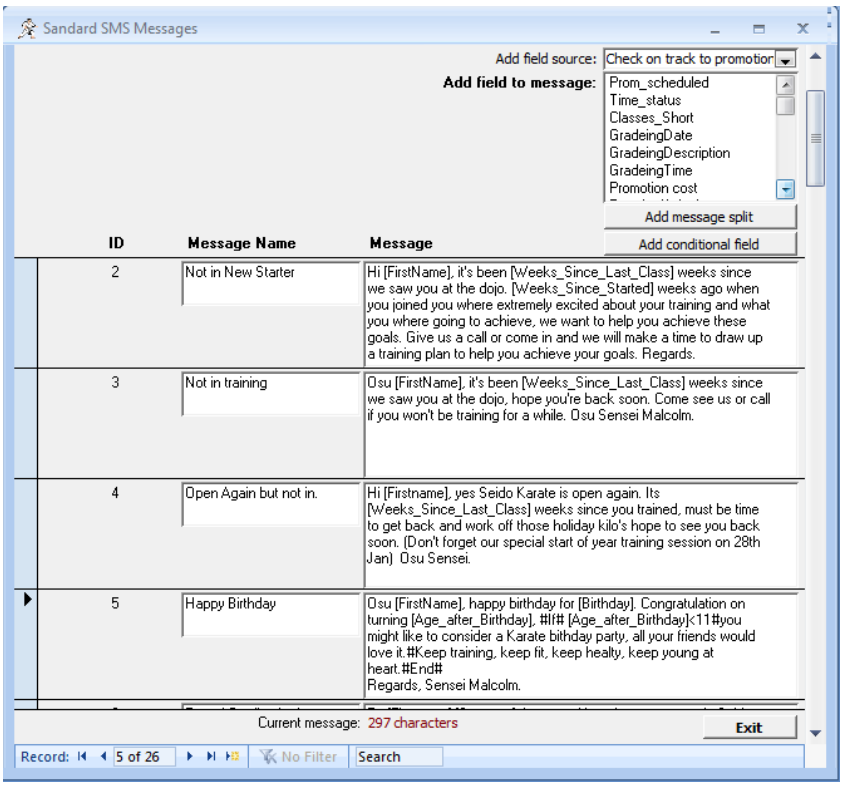
- Text will be sent as it is typed.
- Double clicking an item in the "Add Standard Message" list will add this message along with any custom fields it contains (see explanation of custom fields below).
- Double clicking any of the listed fields in the "Add field to message" list will add this field [Month_1] or [Firstname] for example. When you send the messages these fields will be replaced with the data for each member such as their first name, this way they receive a personalised message.
- Clicking "Add Conditional Field" with allow the display of a message depending on certain criteria being met. The following text is added to your message: "#If#<condition>#<true>#<false>#End#". You replace <condition> with the expression you wish to evaluate; in the shown example the condition is "[Month_1]=0" if Month_1=0 the text that replaces <true> will be displayed otherwise the text substituted for <false> will display. You can see a sample of how the message will look in the preview window below this it tells you how long the current message is and what the maximum length will be, as this will change from member to member depending on their name and other personal details included in the message. To send the message as shown to a single person click Send Single SMS message or click Send to all to send to all listed members.

Standard SMS messages

FUNCTION: Create and edit standard SMS messages.

USE: Use this screen to set up standard SMS messages you will be sending to your members.

For the message name make sure you use a description that will allow you to identify the message when you want to use it. For any message you can add standard fields to it in order to make it personalized (see send multiple messages for more info on how these work).

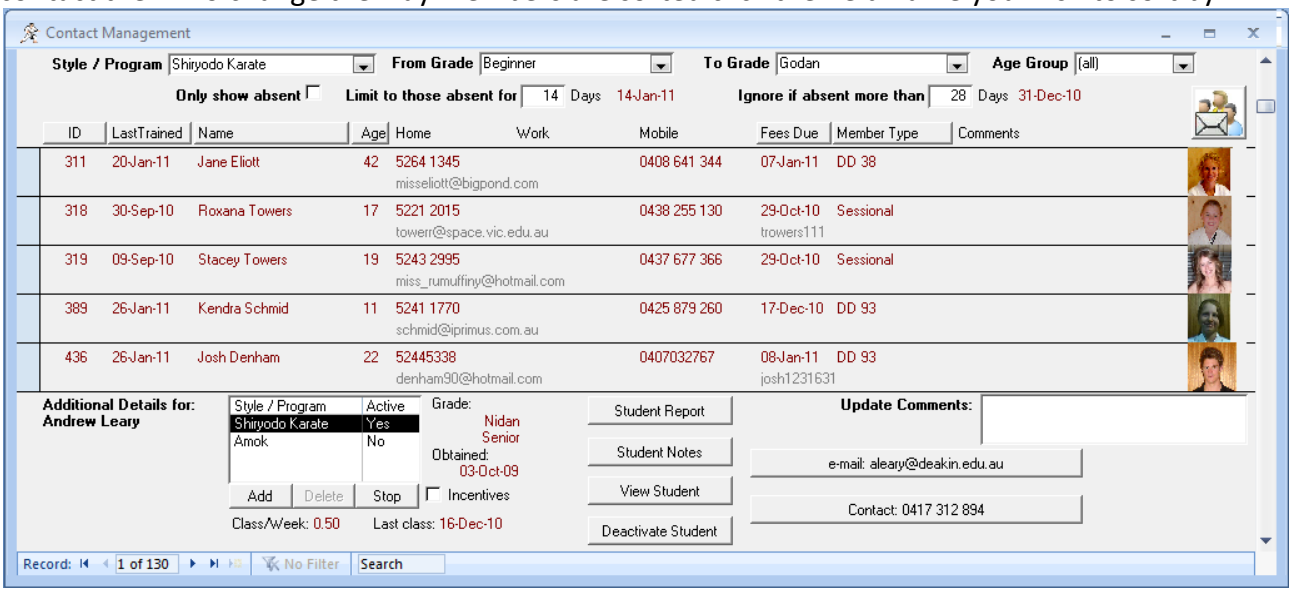


Contact Manager

FUNCTION: Provides easy access to member details to enable them to be contacted.

USE: Use this screen to list absent members and contact them or to list members who you are going to contact.

This screen lets you quickly perform functions associated with contacting members such as recording comments about them, creating a note of the contact made or deactivating a member. It also makes it easy to get information such as notes about member when you are going to contact them. To change the way members are sorted click the field name you wish to sort by.



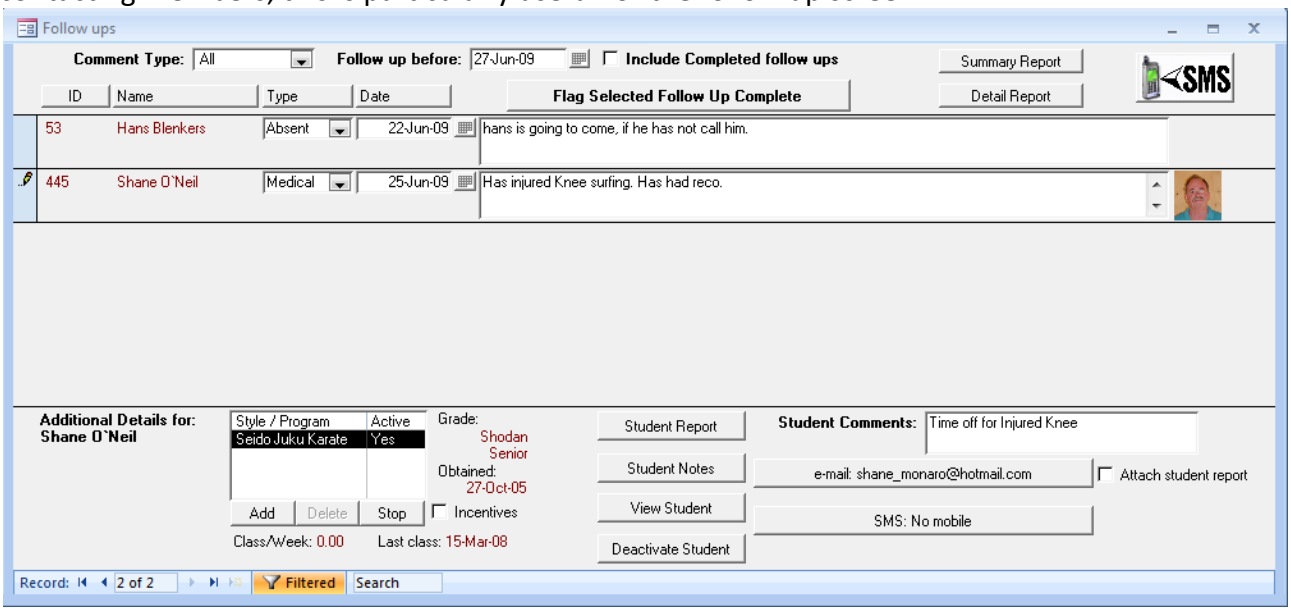
If you are using Skype then just double click any phone number to call it.

List all notes / Follow up notes

FUNCTION: Displays notes / follow up notes.

USE: This screen shows notes or those with a follow up date on them. Use this screen to see what notes have been made or what follow ups are required.

Similar functions to the contact manager screen are provided with these screens to facilitate contacting members, this is particularly useful for the follow up screen.

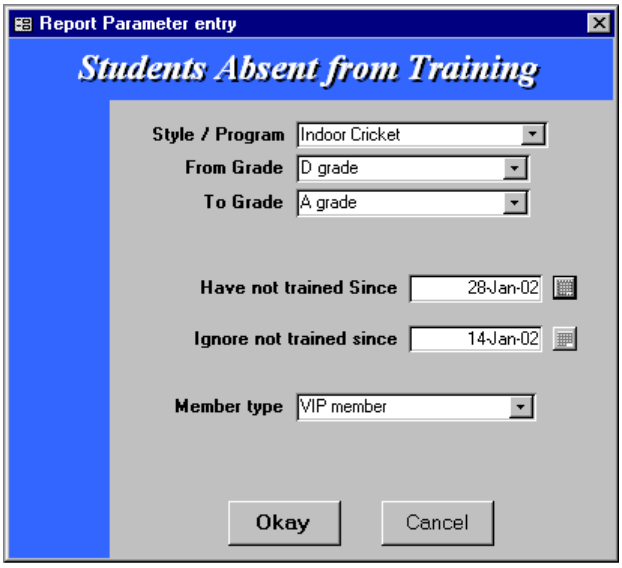


Members Absent

FUNCTION: Reports members who have not attended based on the date of their last attendance.

USE: Use this to track those who are stopping attending. If run every week you can identify quickly and contact those who have not attended.

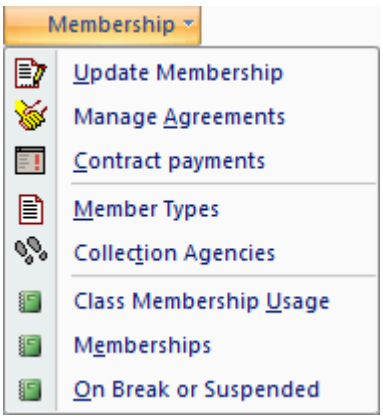
The default setting is to display all members who have not trained for 2 weeks ignoring those that have not trained for longer than 4 weeks. These figures may be altered. Members and their phone numbers along with any comments will be displayed to allow them to be contacted to inquire as to reason for absence.



In the example shown here it will only show members in the "Indoor Cricket" program (note: Style / Program is only shown for releases that allow multiple styles) between

A and D grades inclusive. Of these only those on a “VIP membership” will be shown.

It will then select those who have not attended since 28-Jan-02. However if they did not attend in the preceding 2 weeks (from 14-Jan-02) it will not show them. This allows you to stop members being reported week after week if you do not need this information.



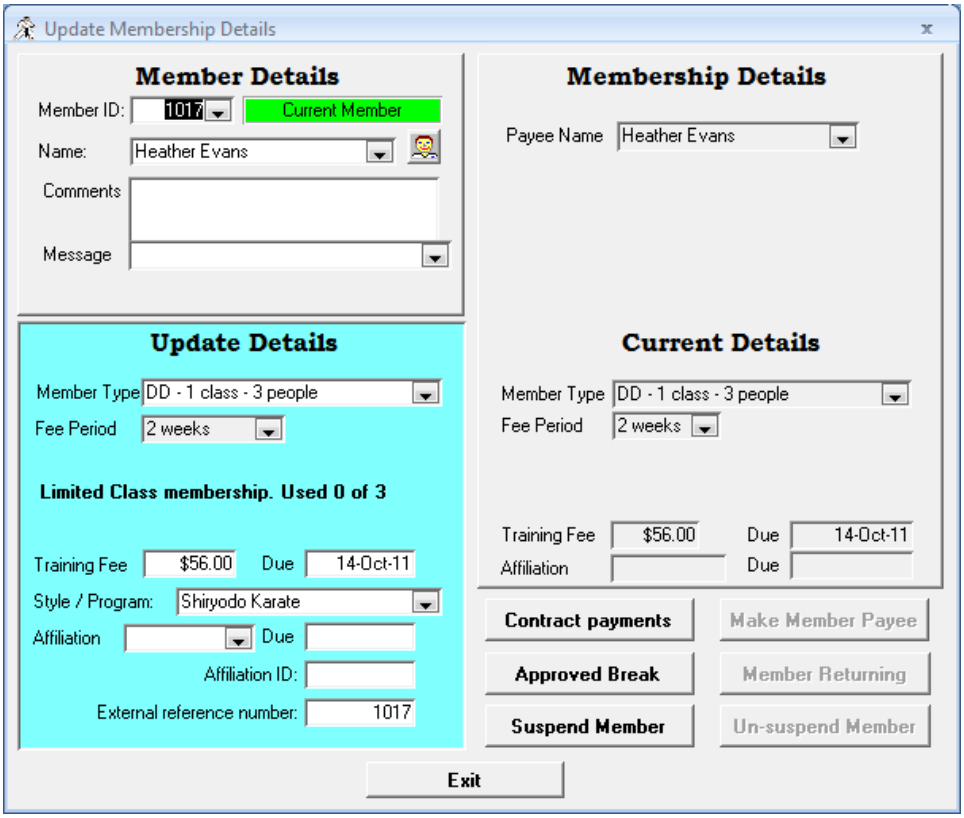
Membership menu

Set-up and maintain membership types. Update Memberships and contracts associated with these memberships.

Update Membership

FUNCTION: Maintain and update membership details including membership status, type and adjust fee dates.

USE: The purpose of this screen is to allow you to make changes to a membership. You can do this at any time; all date adjustments have receipts created to record them.



Entering the new details in the Update Details Panel can alter the membership type along with the due dates for annual, training and affiliation fees. Immediately the new value is entered a receipt is created.

The **Affiliation ID** is the number assigned to a member by an external organisation if you are using the affiliation function.

The **External reference number** is used when receiving externally collected fees to identify the membership being received against.

Click Contract Payments to bring up Enter contract screen for this member.
Click Make Member Payee to make the current member selected the payee on the membership. For memberships with more than one member on them the Payee is the name used for all billing purposes.
Click Approved Break to temporarily suspend members' membership while they are not training. For family memberships this should only be done if no members of the family will be training.
Click member returning to reactivate membership when member returns, when you do this you will be given the option of extending the members Fee due date.
Click Suspend member to suspend a member's membership if they will no longer be training but are still required to make payments to full fill contract obligations. This can also be used if member's fees are overdue to prevent them being able to be placed in class.
Click Unsuspend member to remove suspension from membership.

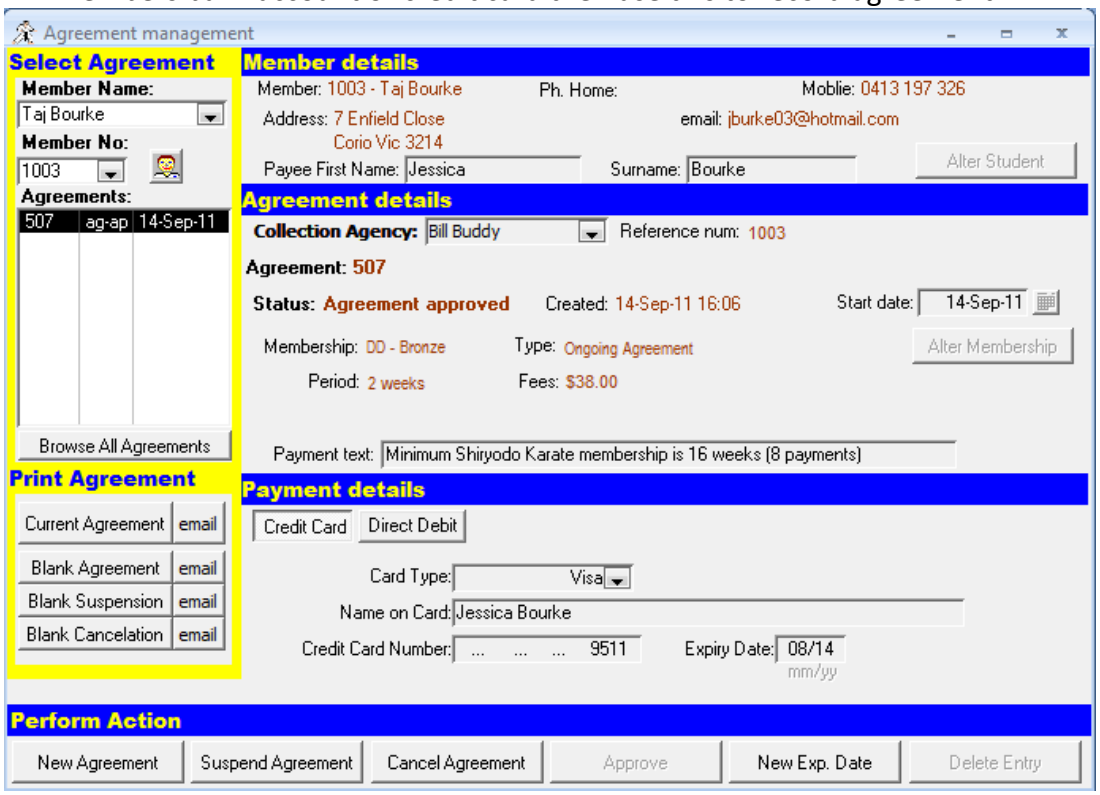
Member Status's

Current Member: - Member is currently training.
Member on Break: - Member is currently on an approved break from training.
Member Suspended: - Members membership has been suspended and training privileges revoked.
Deactivated Member: - Member is no longer enrolled to train.

Manage Agreements

FUNCTION: Create and maintain payment agreements.

USE: If you are creating a payment agreement where payments will be collected direct from members bank account or credit card then use this to record agreement.



To create an agreement the member must be on a membership type that is flagged as for external collection or is a period contract. Click New Agreement to create a blank agreement for the member then enter their bank or credit card details before clicking approve agreement to lock it. If you need to alter the agreement details select update agreement and the current agreement will nfunctions. For any agreement, cancellation or suspension you can print them out to have the member sign them.

For security purposes credit card numbers are not displayed, these are stored in an encrypted format in the database. One the agreement is approved these can not be accessed so it is important to print out agreements to be signed before approving them.

Agreements are managed by 3 types of documents:

Agreements: These contain details of the agreement it self.
Suspensions: These enable you to suspend a memberships collection.
Cancellation: Cancellations are used to stop agreements.

For any member you can only have maximum of 2 agreements. Where a 2nd agreement is being created a cancellation must exist for the initial agreement so that date overlaps d not happen.

Initially all agreements, suspensions and cancellations have a status of entry. Once approved they become effective based on the date entered. Cancellations move to a status of finalised once the cancel date is reached, also changing the status of the agreement to cancelled. Suspensions move to a status of finalised once their finish date is passed.

Contract Payments

FUNCTION: Create and maintain contract payment records for contract memberships.

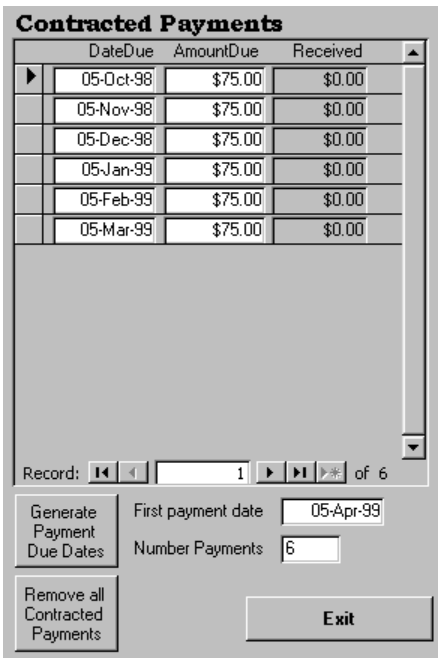
USE: If placing member on contact then use this function to generate their payments, and then maintain them through this screen also.

If entered directly Member number or name may be entered to bring up members details.

Create: To Generate Contract payments enter number of payments to be generated and the date first is due to be received. These default to those specified by the type of membership and the current due date / or the date the last payment will extend membership to. Then Click Generate Payment Due Dates

Update: Due dates and amounts due on these dates can be altered at any time on this screen.

Delete: To delete a single contract payment, click the box to the left of it then hit <delete>. To delete all contract payments for a member click Remove all contracted Payments.



NOTE: Contract payments only indicate an amount agreed to be paid. Removing a payment will NOT alter when a membership is paid till. If you wish to extend a membership then this must be done separately. On the other hand if you reduce a payment amount due then when this amount is received the membership will be extended by the full period not a reduced period.

Member Types

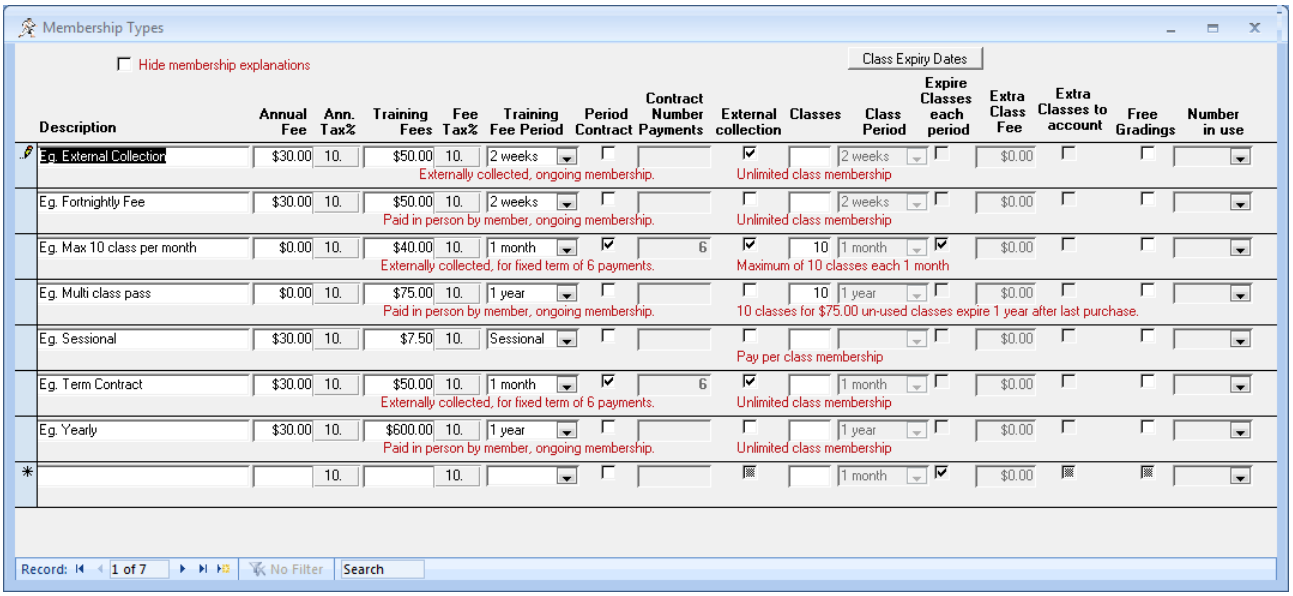
FUNCTION: This screen allows creation and maintenance of Membership types and fees associated with them.

USE: This is where you set up your membership types. If you wish to change the fees you are charging you do that in this screen also.

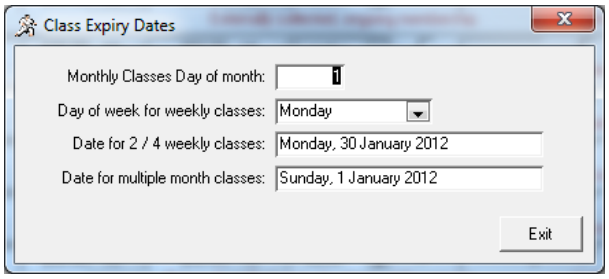
Field Descriptions

Description – This is used for selection of membership type so should be descriptive enough to enable identification of membership types.
Annual Fee – If an annual fee isn't to be associated with a membership type then this may be set to zero, you will however need to extend the annual fee due date into the future to avoid it becoming due.
Training Fees – This is the sum due every "Training Fee Period"
As with the Annual fees, Training Fees can be set to zero (this allows for members to be placed on complementary memberships that do not incur fees).
Training Fee Period – This is the length of time that the Training Fees paid by member entitle them to train for. Valid entries are Weekly, 2 Weekly, Monthly, bimonthly, etc. and Sessional. If you specify Sessional then every time a member is added into a class payment will be requested.
Period Contract – Check this if the member is entering into a contract for a predetermined number of payments. For example a 1 year contract with payments every month.
Contract Number Payments – This only has to be entered for Contracts; this will be the number of payments required.

Eternal Collection – Check this box if the fees are to be paid to an external source as opposed to being paid at dojo.
Classes – If the membership only allows a specific number of classes enter the number here.
Class Period – if the membership is for a fixed number of classes the class period details how often the class are for. This means you can specify 2 classes a week on a monthly membership.
Expire Classes each period – If you check this then every month for monthly memberships the number of classes available on the membership is reset to the number entered. If this is not selected then unused classes accumulate and only expire after the period from the last payment is equal to the entered training fee period. This allows you to set up memberships where someone buys a specific number of classes.
Extra Class Fee – If you are specifying a limited number of classes then when the member uses more than that number this is the amount they are to be charged for those extra classes.
Extra Classes to account – If this option is selected when members on this membership type do extra classes then the amount charged for those will be added to their Fee Account. This would normally be used in conjunction with sending payment requests from club administrator to a collection agency.
Free Gradings – Indicates if grading fees are required for this membership type.
Number in Use – Indicates the number of memberships of this type currently in use.



Class Expiry Dates: If you are using limited class memberships this specifies the day / dates that those class periods start from.



NOTE: If you alter an existing membership you will be given the option to update memberships of that type to the new rate. If you do then the next time that persons fees or contract becomes due for renewal then it will be at the newly entered rate.

You should remove old membership types that are no longer used. To do this, simply select the membership to be removed, by clicking the box on the left-hand side of it. Then presses delete. You will not be permitted to delete a membership type that is in use by one or more current memberships.

The memberships you set up largely govern the way your business will operate and how the income will be derived. It will also determine the complexity of the financial relationship you will have to maintain with your members. There are several types of membership supported by Club Administrator. Use as many of these as you want however keep in mind that the less different types of memberships you have the simpler it will be.

Sessional fees

SETTINGS: Enter 'Training Fee Period' as "Sessional".
EXAMPLE: See ***'Sessional'*** Membership type above.

Under this membership type a member pays fees each time they attend a class. If you are considering using the "Class Entry" module you must keep in mind that this facility is designed to allow members to record their attendance and remove the need for reception staff. This does not provide for collection of payment if a member is on sessional payment. If using the Class Entry module for some members then those on sessional fees may not be issued with barcode cards but required to register with staff and make payment at that time.

Annual Fees

SETTINGS: Enter the amount for annual fee in 'Annual Fee'
EXAMPLE: See ***'External Collection'*** Membership type above.

Many organisations have annual fees. These can be recorded here. This can also be used to pass affiliation fees onto members in the way of an annual membership fee. Annual membership fees are available to be used in conjunction with all other fee types.

Periodic internally collected membership types

SETTINGS: Enter the amount for training fee in 'Training Fee' leave 'Period contract' and 'External Collection' unchecked do not enter a number for 'Classes'.
EXAMPLE: See ***'Fortnightly Fee'*** Membership type above.

This is probably the most common type of membership. For this type of membership there is a set fee that recurs at regular intervals (Fortnightly, monthly, by-monthly, quarterly, four monthly, half yearly or yearly). When the fee is paid the membership paid to date is extended each time. This type of membership is simple to manage but the longer the period that members enrol for each time the more likely they will need to be reminded when their fees fall due.

Periodic externally collected membership types

SETTINGS: Enter the amount for training fee in 'Training Fee' leave 'Period contract' unchecked and check 'External Collection' do not enter a number for 'Classes'.
EXAMPLE: See ***'External Collection'*** Membership type above.

For this type of membership there is a set fee that recurs at regular intervals (monthly, by-monthly, quarterly, four monthly, half yearly or yearly). These are received via a third party or by use of some other external means. The details of these payments are then entered periodically

from statements received and member's records are updated at this time. This method allows for automatic payments and transfers of funds reducing the need to chase up fees.

Contract External memberships

SETTINGS: Enter the amount for training fee in 'Training Fee' Check 'Period contract' and 'External Collection'.

EXAMPLE: See ***'Term Contract'*** Membership type above.

This membership is the same as internal contracts only the fees are paid to an external company or directly into an account. The details of these payments are then entered periodically from statements received and member's records are updated at this time. This method allows for automatic payments and transfers of funds reducing the need to chase up fees.

Limited Class per Period memberships

SETTINGS: Enter the amount for training fee in 'Training Fee' enter number of classes permitted to be done in period in 'Classes' Check 'Expire Classes each Period' set the Class Period for classes to expire.

EXAMPLE: See ***'Max 10 class per month'*** Membership type above.

This membership type allows you to set a maximum number of classes a member can attend in the period. This allows you to have more than one rate for those who will be attending less frequently. You can use this with all the combinations of contract and internal / external memberships also.

Class based memberships

SETTINGS: Enter the amount for training fee in 'Training Fee' enter number of classes permitted to be done in period in 'Classes' Do not check 'Expire Classes each Period'.

EXAMPLE: See ***'Multi Class Pass'*** Membership type above.

This membership type allows you to set a number of classes that a member will be entitled to for each payment. These classes can be added to by making further payments. Any unused classes will expire after the period of time from the last purchase is greater than the entered fee period. So for example if on the membership type above I purchased 10 classes on the 1-Jan-01 and another 10 on the 1-Feb-01 if I had not used them or bought any more classes I would lose them in 1 year, on the 1-Feb-02. I recommend that you use 6 months or 1 year as the expiry for classes purchased, if you do not want classes to expire then you can set this for as long as 3 years.

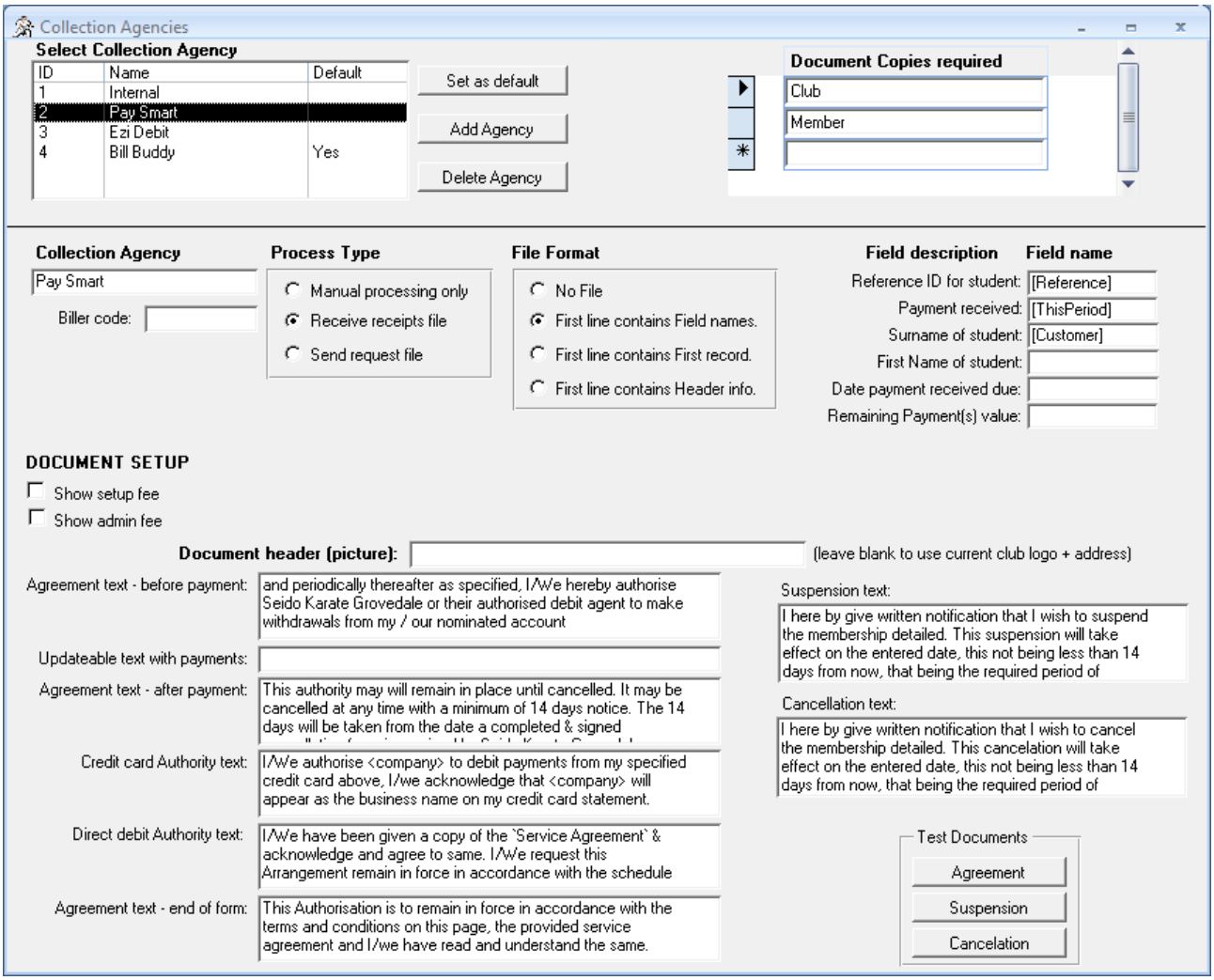
Collection Agencies

FUNCTION: Define Collection agencies and file formats they send.

USE: Where you have external fees being collected through one or more sources you speficy these here along with the format of files they send you / you send them, this format is used for loading / sending files.

Select Collection Agency: use this list to select the collection agency you wish to work with. The buttons beside this list allow you to add and remove entries.

Document Copies required: When printing agreements one will be printed for each entry in this list.

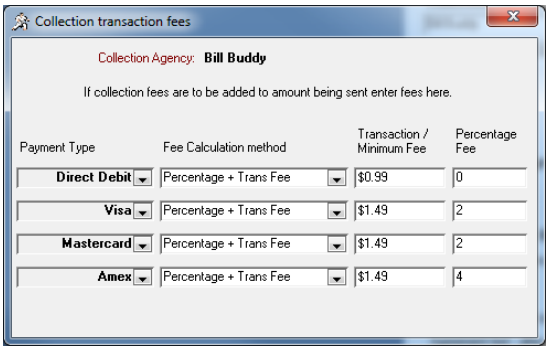


Collection Agency: Name of Collection Agency.

Biller Code: if you are working with the Bill Buddy request files this is required to be entered as this is included in the files created to ensure that the files are always being loaded to the correct account in Bill Buddy.

Process Type: this will determine how the payments for the agency are managed in club administrator.

- **Manual processing** – select this if you will not be sending or receiving payment files. For this type of setup you will be manually entering the payments received, normally through the "Receive External Payments" screen
- **Receive receipts file** – for most collection agencies you will be able to either receive a file or download a file containing the payments that have been received. Select this option to enable configuring and loading of this into club administrator.
- **Send Request file** – this is the best way for managing the collection of payments through a billing company as all the processing and storage of information is kept in club administrator then you simply send a request file to initiate the collection of payments.



Set Collection Fees: when you select the Send Request file processing type the "Set Collection Fees" button will appear. Clicking this will open a screen to allow you to set transaction and merchant fees for the Biller. This gives you the ability to add the fees being charged by the collection agency to the amount being requested. Doing this gives you the flexibility to charge an amount you think is appropriate for the provision of this service to your members (this may differ from that actually charged by the biller or may be the same for example you may be paying $0.99 transaction fee but charge your members $1.95 transaction fees to also cover your time in managing this process).

File Format: where files are being sent or received this enables you to configure the format of the file. Files loaded must be comma separated files (Except Bill Buddy files).

- **First Line Contains Filed names:** if this is the case enter the name of the field in the relevant column for the Field definitions.
- **First line containing first record**: in this case the first field will be [F1], 2nd [F2] and so on when entering filed definitions.
- **First line contains header info:** then use filed definitions the same as for files without field names, the first line will be ignored.
- **Bill Buddy request file:** If you select send request file this additional option will appear. Club Administrator has had the Bill Buddy file formats already defined so that if you are working with Bill Buddy you only need to select this option and no more configuration is required.

Field Descriptions:

- **Reference ID for Member:** This must be entered, this reference number is used to identify which member payment is assigned to. The reference number may be assigned by you or by the collection agency, in both cases enter this number in the external reference number on the update membership screen.
- **Payment Received:** This is the amount that has been received in this payment. This amount will be loaded against the members membership. Ideally this amount will not include any collection or bank fees, if this includes collection fees then the members fees should be increased by this and these then entered as an expense in the general ledger.

- **Surname of Member** (optional)**:** Last name of member. If whole name of member is included in one field then enter name against this field.
- **First Name of Member** (optional)**:** First name of member.
- **Date Payment Received due** (optional)**:** Due date of payment, this will then be checked against due date of payment on your records and if they do not match you will be alerted.
- **Remaining Payment(s) value** (optional)**:** For fixed contracts this is the amount still outstanding, this is used as a check against your records.

DOCUMENT SETUP In this section you set up the format of the documents that club administrator will print out. There are three types of documents, Agreements, Suspensions and Cancellations. Different collection agencies have slightly different wording on their agreements that members must sign. You can enter this text in the provided places to match the format required by the agency you are working with.

Show setup / admin fee select these boxes to include a standard text with these items or you can include this information in the other text boxes.

Document hearer (picture): by default your club details and logo are at the top of the form, you may wish to add the logo of the collection agency you are working with as is present on most agreements, enter a link to the appropriate logo here.

Test Documents: use these to confirm the documents appear as you want them to.

Class Memberships Usage

FUNCTION: Generates a report of all class based membership types.

USE: Monitor utilisation of these memberships and check for exceeded limits.

Limited Class Membership Class Usage

Seido Karate - Grovedale

Member	Membership Fees Paid to	Fee	Max Classes	(- - Attended for period - -) Previous	Current	Future
10 Class a month						
589 - Steve Major	08-May-09	$120.00	10	**17**	8	**0**
795 - Trent Cauarna Cannon	20-Aug-09	$120.00	10	5	7	**0**

Member	Un-used classes Expire on	Fee	Purchased Classes	(- - Classes used - -) To date	Past exp.
10 Class Pass					
45 - Andrew Leary	29-Jun-09	$100.00 / 10	20	14	**1**
744 - Joshua Perry	25-Jan-10	$100.00 / 10	10	2	**0**

Here you can see the 10 class a month memberships member 589 attended 17 classes for the previous month, exceeding the limit of 10 and has attended 8 for the current month, if he had

already registered for any classes in the coming month then these would have been displayed as Future classes.

For the 10 class pass member 45 has attended 14 classes any unused classes are due to expire on the 29-Jun-09, he has registered for or attended 1 class after this date.

Memberships

FUNCTION: Produces report of members on memberships and membership details

USE: Check members enrolled under a specific membership type.

Supplies a list of all active memberships grouped by membership type. This report can be limited by membership type by selecting a membership type from the list or limited to a style, age group or level / range of levels.

Current Memberships

Shiryodo Karate

Membership ID	Name	Annual fee Due	Fee Due	Period Age	Date Started	Suburb
Cash - Bronze - 2 person			$480.00	16 weeks		
949	Phoebe Stojcevski		1/03/2012	9	24-Mar-11	Grovedale
950	Noah Stojcevski			7	24-Mar-11	Grovedale
1006	Kelvin Paddle		9/01/2012	35	19-Sep-11	Waurn Ponds
1007	Alex Paddle			4	19-Sep-11	Waurn Ponds
1026	Toby Johnson		10/03/2012	8	19-Nov-11	Waurn Ponds
1027	Blake Johnson			6	19-Nov-11	Waurn Ponds

Number students *6* ***Number Memberships*** *3*

Annual fees *$0.00* ***Fees (12 months)*** *$4,692.86* ***Total Fees Income*** *$4,692.86*

On Break or Suspended

FUNCTION: Produces report of all members currently on Break or suspended.

USE: Check regularly which members are on breaks or suspended, can then do follow up call or letter.

Supplies a list of all members who are either suspended or on a break.

Students On Break or Suspended

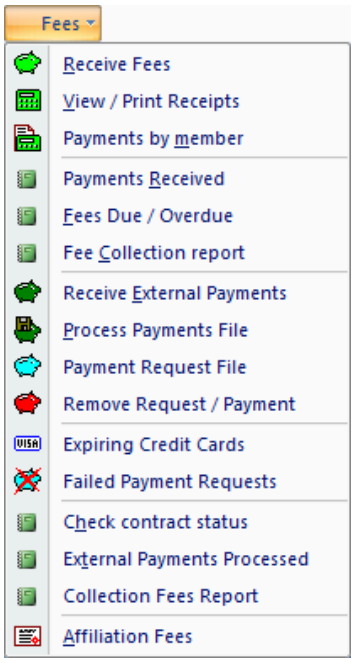
Shiryodo Karate

On Break

ID	Name	Age	Stopped	Comments	Phone
831	Seven Vinton	44			0352432306
				Styles / Programs: Shiryodo Karate	Grade - 6th Kyu Senior
830	Mimi Loois	35	09-Feb-11		52432306
				Styles / Programs: Shiryodo Karate	Grade - 7th Kyu Senior
921	Jarod Jessel	16			
				Styles / Programs: Shiryodo Karate	Grade - 8th Kyu Senior
920	Brandon Jessel	10	07-Jul-11		
				Styles / Programs: Shiryodo Karate	Grade - 8th Kyu Youth

Suspended

ID	Name	Age	Stopped	Comments	Phone
189	Connor Greenhill	15	29-Nov-11		5241 8358
				Styles / Programs: Shiryodo Karate	Grade - 5th Kyu Senior
				XMA - inactive	Grade - Beginner



Fees menu

This provides recording of fee payments as well as external collection of payments.

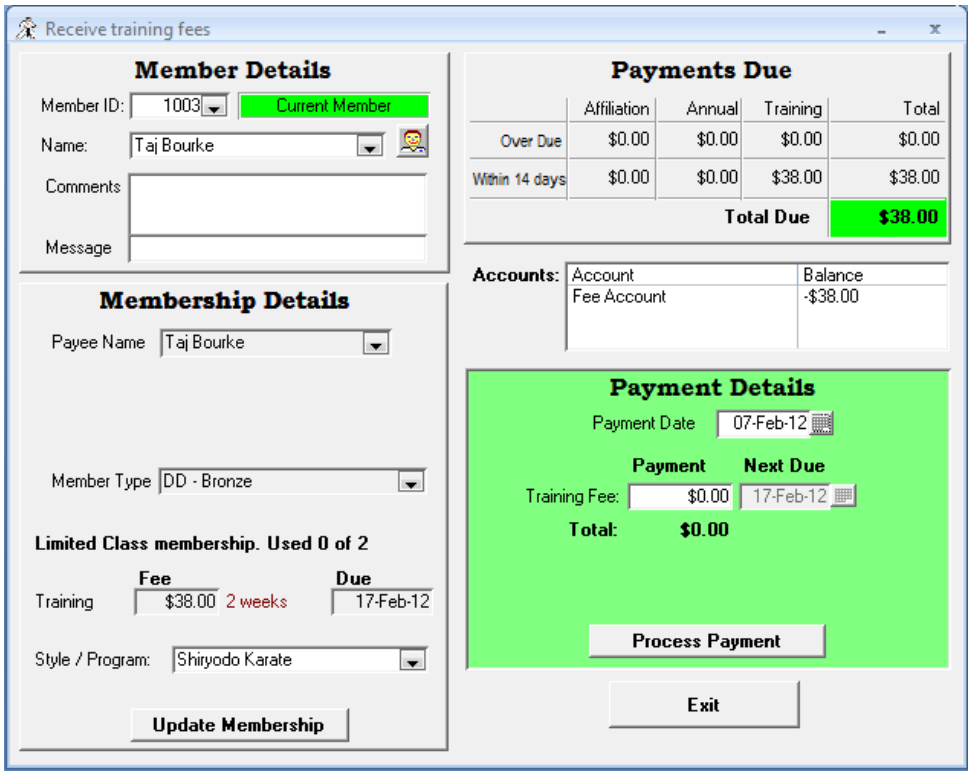
These are recorded separately to allow balancing of cash received for a period.

Also accessed from this menu are the Affiliation Fees options. This single screen provides all functions and reporting required.

Receive Fees

FUNCTION: Record fee payments.

USE: When payments are due from members use this screen to process payments.



On the left hand side of the screen is shown member and membership details. If you need to adjust membership details prior to receiving payment then press Update Membership. On the

right side are shown fee payments that are due and balances of any member accounts payments, below this is the Payment Details box where fee payments are entered.

In **Annual Fee** enter the amount that the member is paying in Annual Fees.
In **Training Fee** enter the amount that the member is paying in Training Fees.
In **Affiliation Fee** enter the amount that the member is paying in Affiliation Fees.
If member does not require any of these payment types then they will not appear. If you wish to receive affiliation fees but they are not displayed then exit this screen; enter an affiliation type in Update membership screen then return to this screen to receive payment.

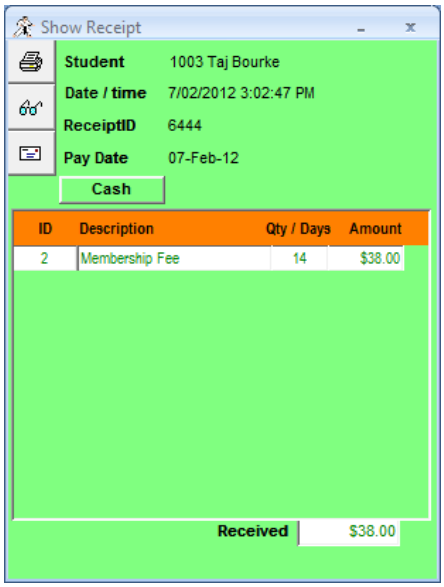
The Next Due dates will be calculated automatically based upon this information. However you can over ride this if required.
If you wish to receive internally fees that are for an External contract click Over-ride receive payment. Contract Payments existing for this member will be reduced by the amount entered should they exist.
Clicking Process Payment will then cause a receipt to be created and display it using the Receipt transactions screen.

View / Print Receipts

FUNCTION: Display receipt details and enables printing of receipt.

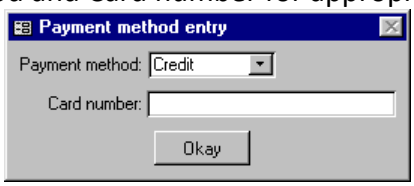
USE: Any payment of or membership adjustment is recorded with a receipt; printed receipts are often required for tax purposes.

View Receipts



The Receipt transactions screen will be displayed when ever a payment is received or a memberships due dates are updated.

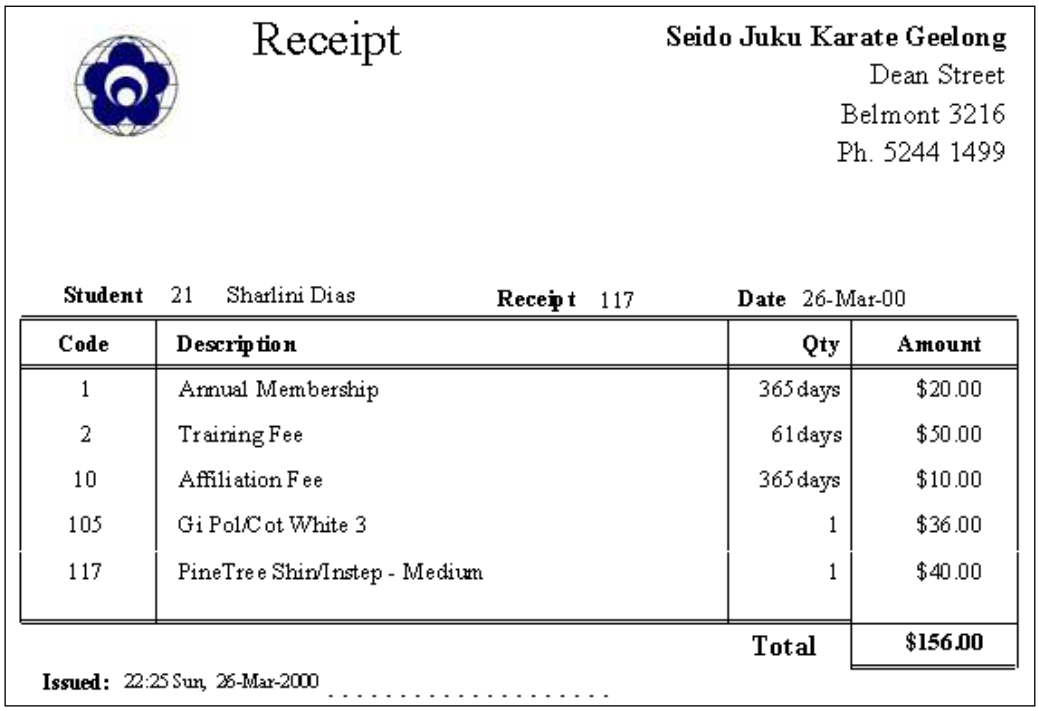
If you have the "Prompt for payment type" option selected then prior to this being displayed you will be prompted for the payment Method and Card number for appropriate types.



You should note that if you wish to remove an entry you could do this by reversing the entered transaction. If the transaction was a sales enter a negative quantity. This provides an audit trail of what has been entered.
To view previous receipts you can click the glasses , then use the record selector to go to desired receipt. Record: 729 of 729

Print Receipts

To print a receipt you first of all must be viewing it in the View Receipts screen (this appears automatically whenever any transactions are processed. Then click the printer icon to format the report. Before sending it to the printer.



Receipt

Seido Juku Karate Geelong
Dean Street
Belmont 3216
Ph. 5244 1499

Student 21 Sharlini Dias **Receipt** 117 **Date** 26-Mar-00

Code	Description	Qty	Amount
1	Annual Membership	365 days	$20.00
2	Training Fee	61 days	$50.00
10	Affiliation Fee	365 days	$10.00
105	Gi Pol/Cot White 3	1	$36.00
117	PineTree Shin/Instep - Medium	1	$40.00
		Total	**$156.00**

Issued: 22:25 Sun, 26-Mar-2000

You also have the option to email the receipt as an attachment to the member by clicking the email button. You will be prompted with a list of attachment types. If you are using office 2007 then Microsoft provides a free add on for word that allows you to save as PDF installing this will add PDF as an attachment option.

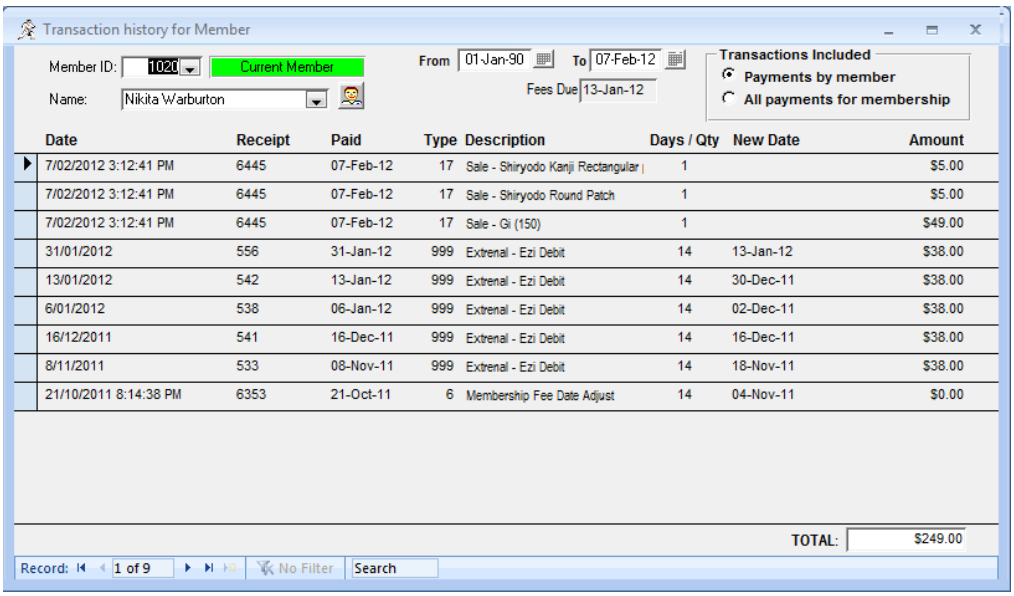
Payments by Member

FUNCTION: Display all the Fee payments received for members' membership and any adjustments made to their membership due dates and any sales.

USE: If you have any queries about a member membership, payments made or due date alterations, this screen will give you these details.

Provides a full audit trail of changes made to due dates and payments received.

Note: If a member moves from one membership (actual multiple person membership, not change in membership type) to another then the history of what payments they made on their old membership cannot be examined this way.



Date	Receipt	Paid	Type	Description	Days / Qty	New Date	Amount
7/02/2012 3:12:41 PM	6445	07-Feb-12	17	Sale - Shiryodo Kanji Rectangular	1		$5.00
7/02/2012 3:12:41 PM	6445	07-Feb-12	17	Sale - Shiryodo Round Patch	1		$5.00
7/02/2012 3:12:41 PM	6445	07-Feb-12	17	Sale - Gi (150)	1		$49.00
31/01/2012	556	31-Jan-12	999	Extrenal - Ezi Debit	14	13-Jan-12	$38.00
13/01/2012	542	13-Jan-12	999	Extrenal - Ezi Debit	14	30-Dec-11	$38.00
6/01/2012	538	06-Jan-12	999	Extrenal - Ezi Debit	14	02-Dec-11	$38.00
16/12/2011	541	16-Dec-11	999	Extrenal - Ezi Debit	14	16-Dec-11	$38.00
8/11/2011	533	08-Nov-11	999	Extrenal - Ezi Debit	14	18-Nov-11	$38.00
21/10/2011 8:14:38 PM	6353	21-Oct-11	6	Membership Fee Date Adjust	14	04-Nov-11	$0.00

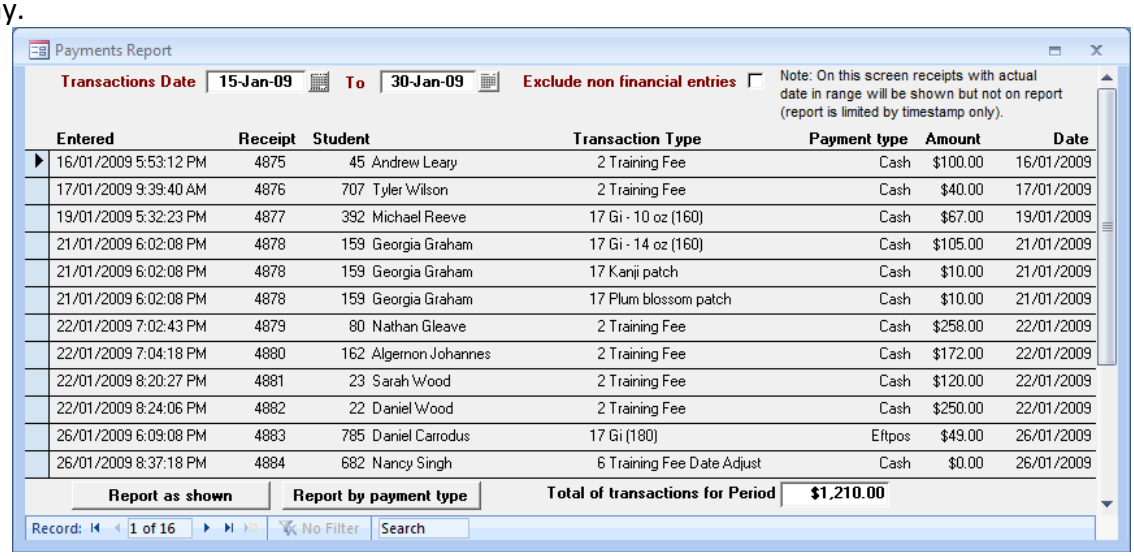
If the person is on a membership where they are not the payee for the regular training fees then these will not appear unless you select “All payments for membership”.

Payments Received

FUNCTION: Display all the Fee payments received for entered period.

USE: Allows you to reconcile amount received for a period.

Enter in the dates between which you wish to examine.
All transactions between these dates will then be displayed excluding external contract payments. These also include any alterations to fee dates. Selecting the report icon will reformat this information into a report for printing. Note: “Exclude financial entries will cause only payments to display.



Entered	Receipt	Student	Transaction Type	Payment type	Amount	Date
16/01/2009 5:53:12 PM	4875	45 Andrew Leary	2 Training Fee	Cash	$100.00	16/01/2009
17/01/2009 9:39:40 AM	4876	707 Tyler Wilson	2 Training Fee	Cash	$40.00	17/01/2009
19/01/2009 5:32:23 PM	4877	392 Michael Reeve	17 Gi - 10 oz (160)	Cash	$67.00	19/01/2009
21/01/2009 6:02:08 PM	4878	159 Georgia Graham	17 Gi - 14 oz (160)	Cash	$105.00	21/01/2009
21/01/2009 6:02:08 PM	4878	159 Georgia Graham	17 Kanji patch	Cash	$10.00	21/01/2009
21/01/2009 6:02:08 PM	4878	159 Georgia Graham	17 Plum blossom patch	Cash	$10.00	21/01/2009
22/01/2009 7:02:43 PM	4879	80 Nathan Gleave	2 Training Fee	Cash	$258.00	22/01/2009
22/01/2009 7:04:18 PM	4880	162 Algernon Johannes	2 Training Fee	Cash	$172.00	22/01/2009
22/01/2009 8:20:27 PM	4881	23 Sarah Wood	2 Training Fee	Cash	$120.00	22/01/2009
22/01/2009 8:24:06 PM	4882	22 Daniel Wood	2 Training Fee	Cash	$250.00	22/01/2009
26/01/2009 6:09:08 PM	4883	785 Daniel Carrodus	17 Gi (180)	Eftpos	$49.00	26/01/2009
26/01/2009 8:37:18 PM	4884	682 Nancy Singh	6 Training Fee Date Adjust	Cash	$0.00	26/01/2009

Payments Report

This report is produced from the Payments Received screen. Payments are broken down by day with total for each day reported and grand total at end of report.

Payments Received Report

From 1/06/2009 to 8/06/2009

Seido Karate - Grovedale

Date	Receipt	Member	Transaction Type	Amount
01-Jun-09	5045	801 Hana Goodwin-Olsen	2 Training Fee	$19.00
	1	**transactions for day.**	**Total transactions for day:**	**$19.00**
03-Jun-09	5046	610 Zara Burrell	15 Grading Fee	$60.00
03-Jun-09	5047	680 Oliver Dans	17 Foot Guard - Dipped	$39.00
			17 Shin Guard - Dipped	$40.00
			17 Head Guard	$49.00
			17 Groin Guard Senior	$15.00
			10 Kanji patch	$25.00
			12 Kanji patch	$5.00
				$173.00
	7	**transactions for day.**	**Total transactions for day:**	**$233.00**
04-Jun-09	5048	769 River Edwards	6 Training Fee Date Adjust	$0.00
04-Jun-09	5049	642 Kyle Wig	6 Training Fee Date Adjust	$0.00
	2	**transactions for day.**	**Total transactions for day:**	**$0.00**
05-Jun-09	5050	45 Andrew Leary	2 Training Fee	$50.00
	1	**transactions for day.**	**Total transactions for day:**	**$50.00**
	11	**transactions for Period.**	**Total transactions for**	**$302.00**

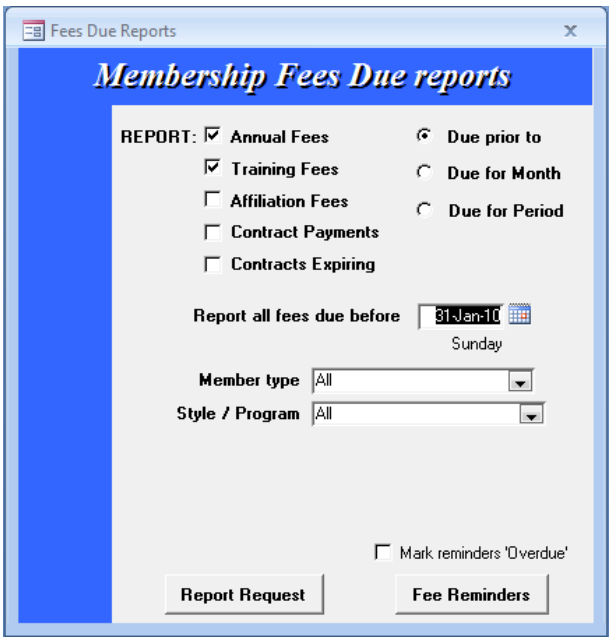
Fees Due / Overdue

FUNCTION: Creates reports of all Fees that are due or overdue, now or for any period.

USE: Use to check for overdue fees and also to check on what income to expect in coming period. Also allow you to print formatted reminder notices to issue to members.

This is done through a series of reports. There are different reports for the different fee types, for contract payments and for contracts expiring. For all these reports the date to be reported on is selected by selection of Overdue, month or Period, and then entering date(s).

There are several types of reports available from this screen. The type of report being determined by checking the box(es) next to report. Then for each report you can choose either a standard report or Fee reminders, which can be marked as overdue if you desire.



Annual Fees / Training Fees

You may check both these boxes at the same time or either by its self. The same report will be produced but for only the type(s) selected. Report request gives Member Details and Amounts due along with the date due.

Due Fees Report

Seido Juku Karate Grovedale

ID	Name	suspended on break	Annual Fee Due Date	Annual fee Due	Training fee	Training Fee Due Date	Training fee Due
45	Andrew Leavy	17-Nov-01		**$40.00**	$50.00	17-Feb-02	**$50.00**
50	David Milson	16-Jan-02		**$40.00**	$50.00	16-Feb-02	**$50.00**
3	Debby Hiland	08-Jan-01		**$40.00**			
30	Josh Wilby	Brk	$47.00			18-Jan-02	**$94.00**
39	Kylie Mensha	Brk	20-Sep-01	**$40.00**	$50.00	20-Dec-01	**$150.00**
19	Maya Maxwell	$75.00				14-Feb-02	**$75.00**
2	Michelle Orange	$47.00				10-Feb-01	**$611.00**

Total Due: **Annual fees** **$160.00** **Training fees** **$1,030.00**

Affiliation Fees

This report gives Member Details and Amounts due for affiliation fees.

External Payments

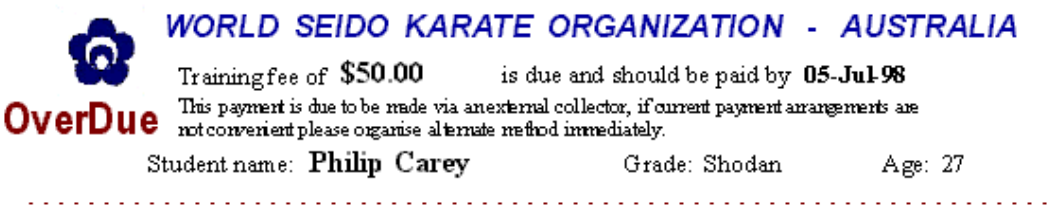
This report gives Member Details and Amounts due along with the dates due and when membership is paid till.

Contracts Expiring

This report gives details of contracts that are expiring in the period entered.

Fee Reminders

For all these reports you can also print out reminders to hand to members. To do this simply select details as above for various reports then click Fee Reminders. By also checking the "Mark reminders Overdue" box reminders will be printed with a large OVERDUE on them.


WORLD SEIDO KARATE ORGANIZATION - AUSTRALIA
OverDue
Training fee of $50.00 is due and should be paid by 05-Jul-98
This payment is due to be made via an external collector, if current payment arrangements are not convenient please organise alternate method immediately.
Student name: Philip Carey Grade: Shodan Age: 27

Fee Collection report

FUNCTION: Display all members with membership details.

USE: If you do not have a computer at the training location this report can be taken to refer to for members due dates and to record payments on.

Due Fees Report

Seido Juku Karate Grovedale

Member	Name	Member type	suspended on break	Fee	Due date
13	Adam Smith	Sessional		$10.00	19-feb-02
44	Alex Fox	Adult Contract		$47.00	**15-Jan-02**
45	Andrew Leary	Adult Monthly		$50.00	**17-Feb-02**
17	Andrew Oliver	Adult 10 Session		$80.00	18-feb-03
47	Beth Treble	Adult Contract		$47.00	**04-Feb-02**
41	Bradley Johnson	Adult Contract		$47.00	02-mar-02
34	Brenda Giles	Family 2 person		$75.00	**24-Sep-01**

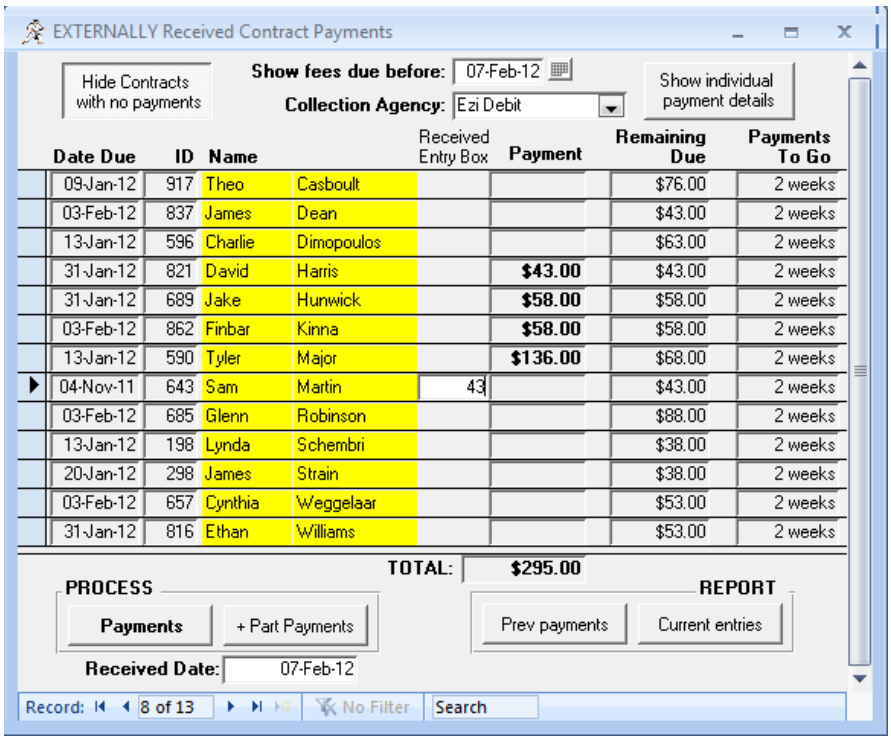
Can be sorted by either member number or by member name.

Receive External payments

FUNCTION: Provides user the ability to enter in bulk fee payments marked for external collection.

USE: When you receive a statement of externally received fees enter the amounts in this screen and reconcile amounts back to member accounts.

This screens allows contract payments received externally to be recorded and members membership due dates are then updated accordingly. A summary of all contract payments due is displayed.



When receipting payments the amount being received should be entered in the "Received Entry Box" Column next to the member who payment was received from.

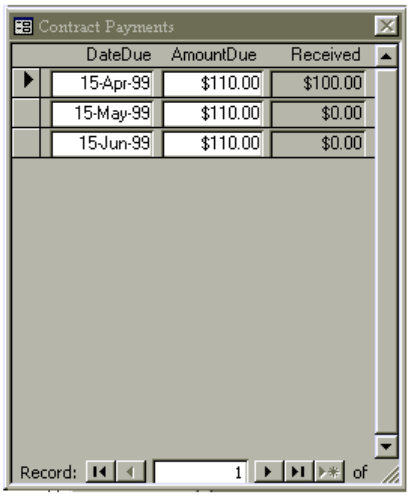
The "Date Due" indicates the date on which the next contract payment falls due for the member membership. This is not adjusted by any currently being received until they are processed.

The "Remaining Due" tells how much this member still has owing in contracted payments after the current amount being received is taken into account.

"Payments to go" indicates how many payments are still outstanding, including any with only partly received payments. Than after the "/" is the number of payments that this contract type is for.

Once the entire batch being processed has been entered in this screen Click Payments in the PROCESS options group.

Note: that any part payments received (part payments are an amount less than the membership fee that is payable for the membership type a member is on) are processed but the member is not credited with an extension of their membership until the full payment has been received. You can over ride this and credit the member with a part extension for the part payment by clicking Process Part payments then indicating which members you wish this to apply for. This allows part payments to be cleared out where the whole payment is not ever going to be received. You should keep in mind though that this also finalises and removes that particular contract payment, which may lead to confusion, should the remainder of the payment be received at a later date.



Once payments have been processed you will be presented with the External Payments Processed screen to check the total received and print report to double check results.

Show Contracts with no payments Clicking on this will add to the screen all members on external contracts where they do not have any payments outstanding on their contracts.

Show individual payment details
Clicking this will display the contract payments for the currently selected user. Move this to a position on the screen where it will be visible while navigating through users. Then as you select a user you will be shown the details of the individual payments that are still outstanding for this Member.

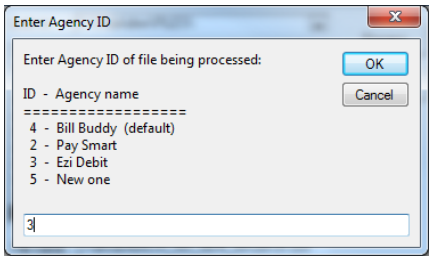
In the given example you can see that there are 3 outstanding payments for the contract and that currently $100 of $110 due is being received for one payment.

Process Payments File

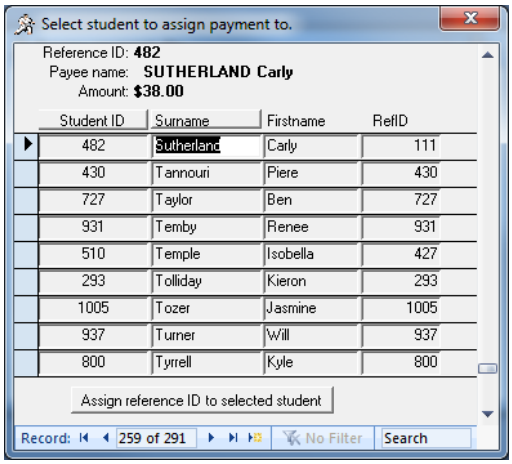
FUNCTION: Allows you to process payments file containing externally received payments.

USE: When you have a collection agency collect payments on your behalf they will be able to send you a file containing these payments that have been collected. This can then be loaded into club administrator to update your records.

You will first be presented with a dialog box to locate the file to be processed. The file must be a comma separated values file (.csv) the format of the file and location of the fields required to load the information is all configured in the Memberships – Collection Agencies screen.



Once you select the file to be processed you will be prompted to select the collection agency that it has been received from.



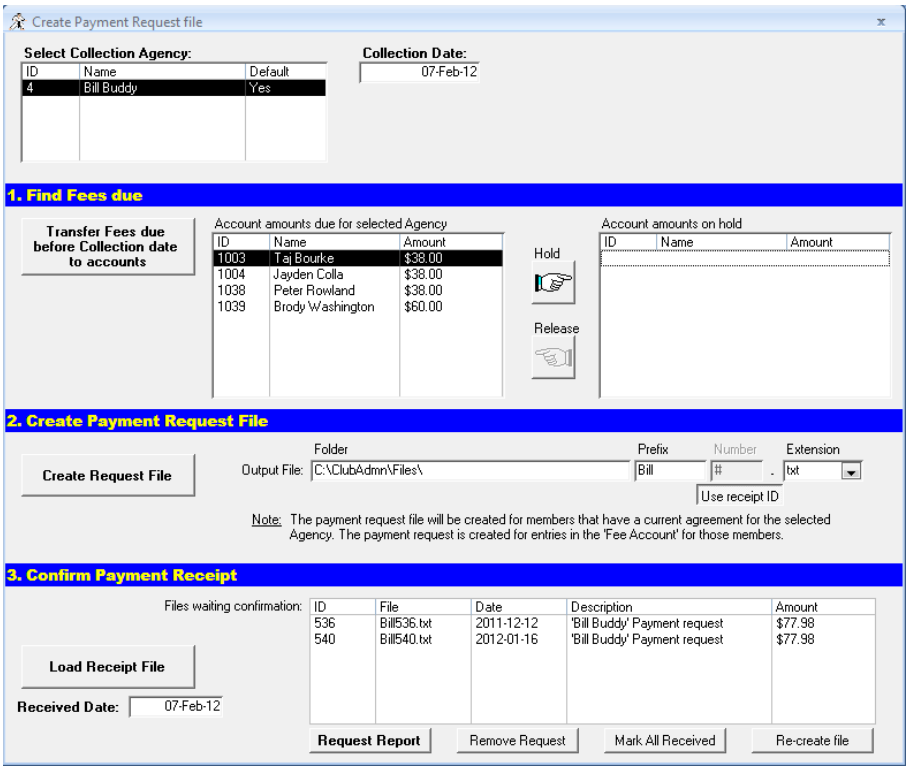
When a member is set up their member ID is set as the External reference number in the membership details screen. This number is used to match payments being loaded to memberships. In cases where the collection agency is assigning the ID number then you can update this to be what they assign. If you are loading a file and a payment is detected for an ID number not associated with a member then you will be prompted to assign this number to a member with the screen shown.

Once the file has been loaded the External Payments Processed screen will be opened showing details of the payments received.

Payment request file

FUNCTION: Allows you to send a file containing payment requests.

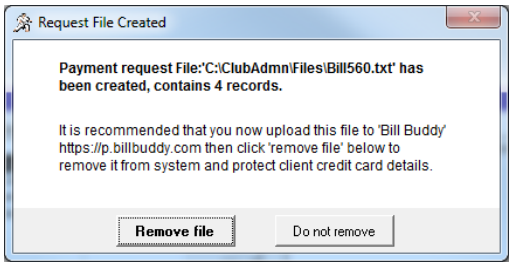
USE: In Club Administrator you can set up payment agreements then simply send a file containing the collection request details to the collection agency to collect the payments. This removes the need to have the payment schedule being maintained by a third party (normally a collection agency will have a website for you to maintain this).



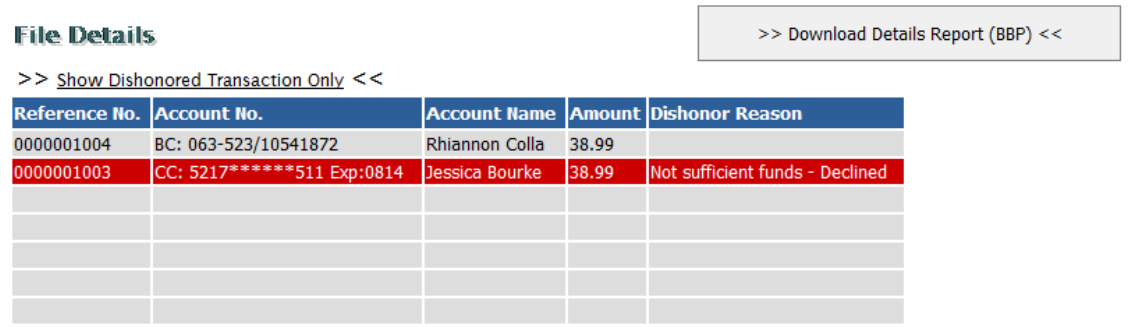
First select the billing company that a request file it to be produced for and the date the payments are to be collected on. There are then three steps in managing payment requests. The following will detail exactly how this functions will Bill Buddy, other companies may differ slightly from this in some aspects.

1. **Find Fees Due** – Clicking "Transfer Fees due before collection date to accounts" will cause any training fees for members with agreements for the selected agency to be transferred to their "Fee Account". These will be added to any other amounts that are currently in this account. This can include items like sales that have been transferred to the account for collection, eliminating the need for the member to pay at the time of purchase and allowing you to collect it with their fees avoiding bank fees.
    a. If you double click on one of the students with fees to be collected this will open their account, here you can alter the next collection date or the maximum amount to be collected.
    b. Selecting a member and clicking hold will put their payment collection on hold, to undo this select the member in the hold list and click release.

2. **Create Payment Request File** – Clicking "Create Request File" will lead to the payment request file being created for all the members with payments due for collection. The file will be created using the file name specified in the Output File: details.
    a. Once the file has been produced you will be shown this form to confirm it's creation. You should now go to the bill buddy website and upload the file created. There are two upload options, you should use the "Upload BBP file" option to upload the created file. Once this is done click remove file. When the file is first uploaded you will see it with a status of being verified, once it has completed being verified select the file and submit for processing.



3. Once a file is submitted for processing it's status will show "Submitted" when it has been processed and payments collected the status will change to "Processed" once this happens (normally 3 days) then click "View Details" next to the file to show the results



Reference No.	Account No.	Account Name	Amount	Dishonor Reason
0000001004	BC: 063-523/10541872	Rhiannon Colla	38.99	
0000001003	CC: 5217******511 Exp:0814	Jessica Bourke	38.99	Not sufficient funds - Declined

This shows the results of the upload, you can then click "Download Details Report (BBP)" to download the results file to load into Club Administrator. Then in club Administrator in the Create Payment File Screen click "Load Receipt File", locate the file and click load. Club Administrator will then match it against the outstanding files listed in the "Files waiting confirmation" list. If there are any failed payments the "Failed payment requests" screen will be opened to show any failed payments.

a. **Request Report** – this will open a report of the payments in the selected file.
b. **Remove Request** – the request will be removed, this should only be used if for some reason the request file is not being sent.
c. **Mark All Received** – this will mark all the payment requests in the file as successfully being received. This should only be used if for some reason the file containing the payments received is not being loaded.
d. **Re-create file** – if for some reason the file needs to be re-created this option will achieve this.

Remove Contract Payment

FUNCTION: Allows you to remove payments from external contracts.

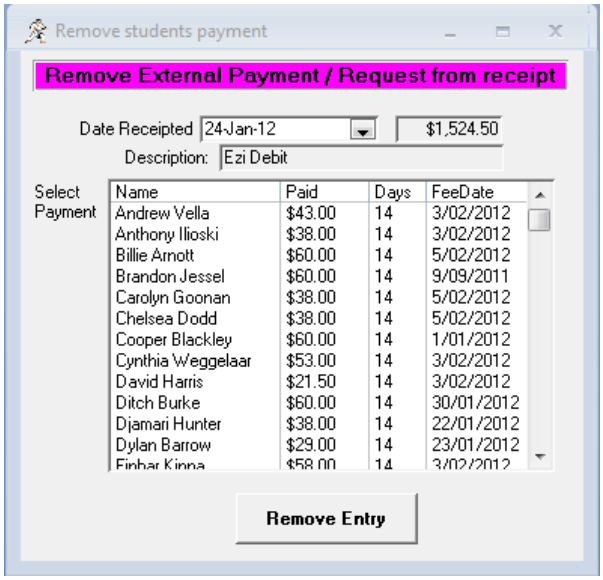
USE: When you process an external contract and then realise that the incorrect amount was entered into it or an amount was received against the incorrect member use this to back out the payment.

This corrects incorrectly receipted contract payments by removing them from the batch.

First select the receipt from which payment is to be removed; you should note the date of the receipt and the amount in order to ensure you select the correct one.

Then select from the list the payment to be removed.
Note: You will notice that where more than one contract payment was credited for a member only the details of the last one updated are displayed. Once this is removed then the previous one may be removed.

Then click remove entry to remove this.



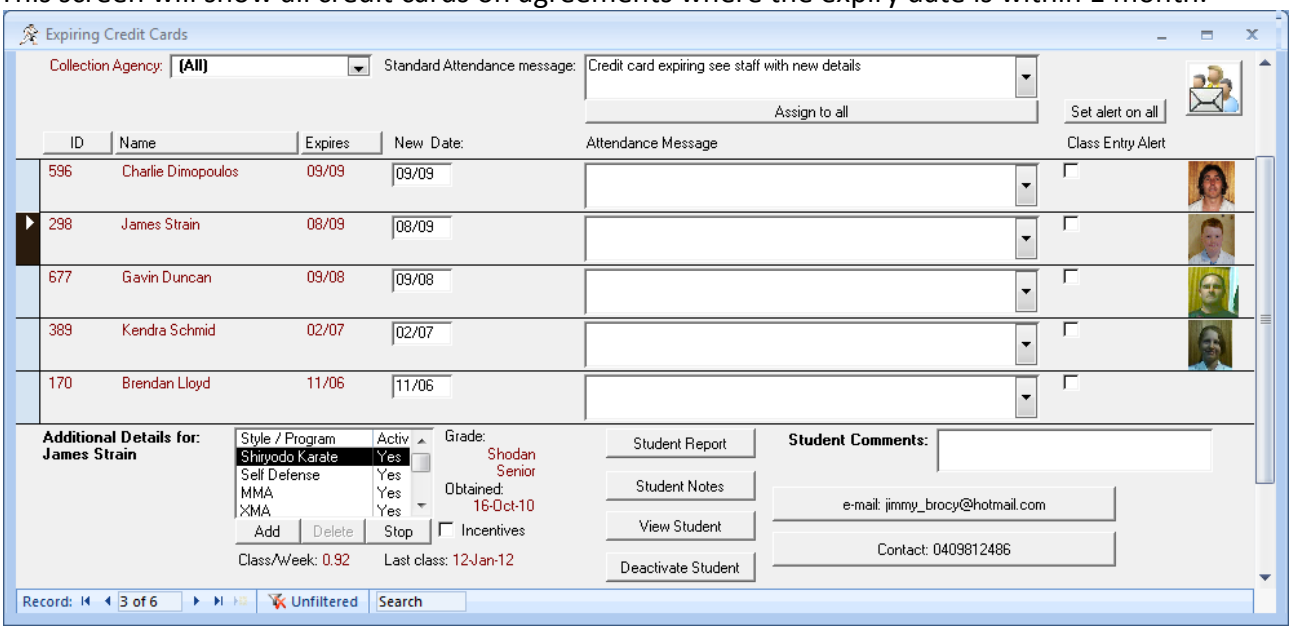
Note: when you do this the members fee due date will be set back to what it previously was and their contract payment(s) will be reinstated.

Expiring Credit Cards

FUNCTION: Show credit cards expiring soon.

USE: manage credit card expiry dates.

This screen will show all credit cards on agreements where the expiry date is within 1 month.



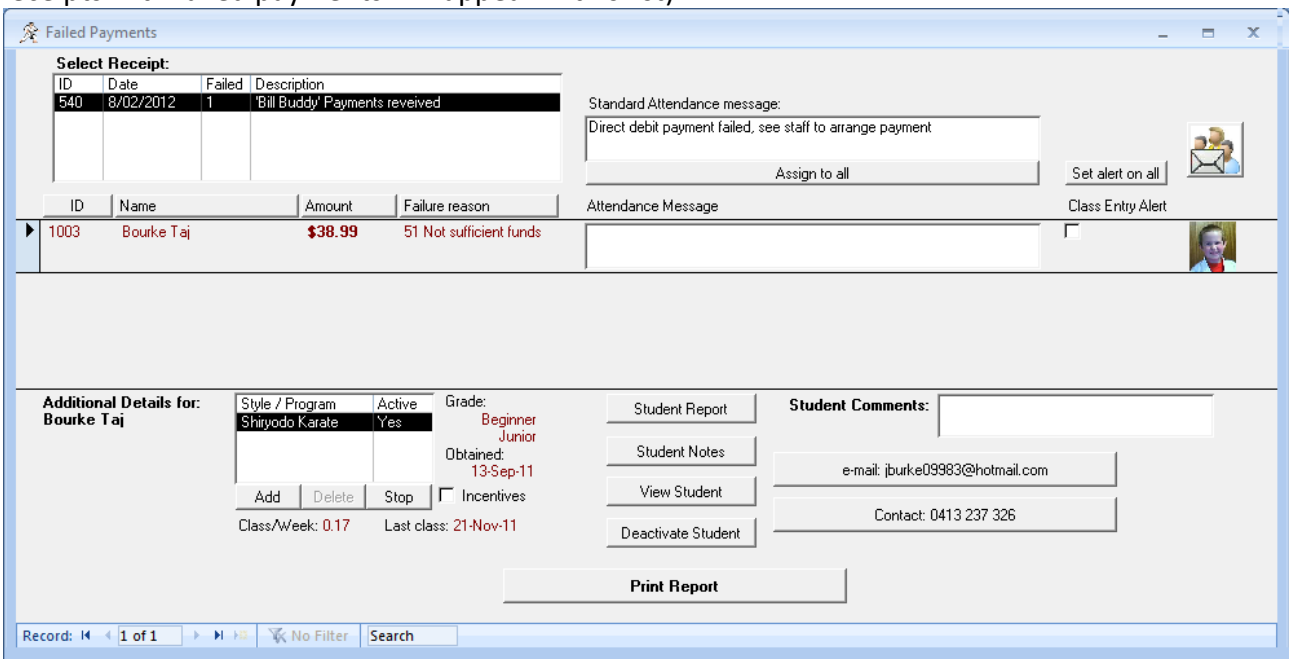
Select a standard message and click "Assign to all" to issue attendance messages to those members with credit cards nearing expiry. Use the bulk message button to send a bulk message to all members displayed or send individual messages / emails. To update just enter new date in the entry field.

Failed Payment Requests

FUNCTION: Shows failed payment requests.

USE: Payment requests can fail due to insufficient funds, closed accounts or other reasons this displays these failed payments to allow them to be managed.

Select the receipt that you wish to show failed payment for at the top of the screen (note: only receipts with failed payments will appear in this list).



Select a standard message and click "Assign to all" to issue attendance messages to those members with credit cards nearing expiry. Use the bulk message button to send a bulk message to all members displayed or send individual messages / emails. To update just enter new date in the entry field.

Click Print report to produce a report of the failed payments.

Failed Payments

Shiryodo Karate

Receipt: **540** 'Bill Buddy' Payments reveived

Received Date: Wednesday, 8 February 2012

Member Name	Member ID	Amount Failed	Failure reason
Bourke Taj	1003	$38.99	51 Not sufficient funds
Total 1 Failed Request		$38.99	

When a payment request fails the amount to be collected is transferred back to the members account and will be collected the next time a request is sent, with any further fee payments added to this.

Check Contract Status

FUNCTION: This report lists the current status of contracts for all memberships on contracts.

USE: Check for contracts that have been paid out or that are falling behind in payments.

You will notice in the example given that member 1080 has no more contract payments to make. Also any contracts with a due date of prior to the current date, ie are overdue, are flagged with a "*" next to the due date.

Contract Payments current status

Seido Juku Karate Geelong Australia

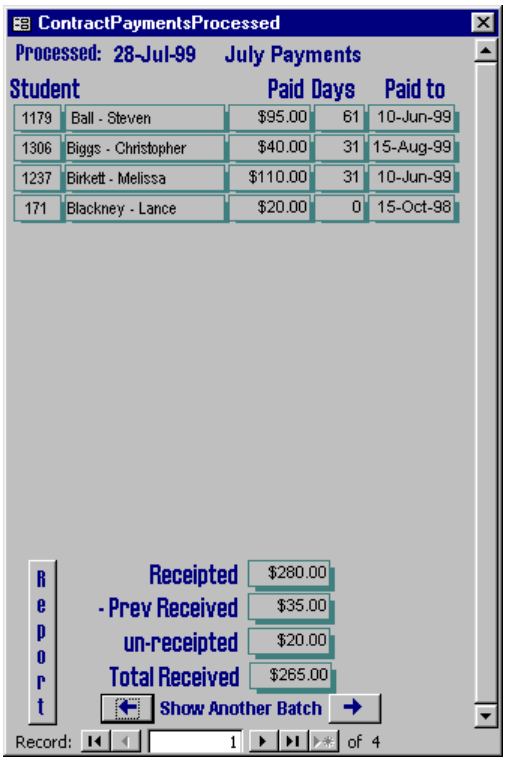
Date Due	*Member*	*Name*		*Payment*	*Remaining*	*Payments*
10-Jun-99 *	1179	Steve	Balt		$195.00	3 / 6
15-Aug-99	1306	Christopher	Big		$400.00	10 / 12
10-Jun-99 *	1237	Melissa	Birett		$550.00	5 / 6
15-Oct-98 *	171	Lain	Black		$205.00	5 / 12
01-Nov-99	1080	David	Borys			0 / 6

External Payments Processed

FUNCTION: Displays payments received externally.

USE: Use to compare to external receipt being reconciled against to confirm all payments are correctly entered.

Once all the payments have been processed the Receive External Payments this screen is normally displayed. This allows you to view what occurred for the batch of payments just receipted.



EXAMPLE:
Member 1179 paid $95 this caused his membership to be credited for 61 days (2 months). This was made up of a part payment of $30 to complete one payment and a full payment of $65. His fees now being paid till the 10-Jun-99. Members 1306 and 1237 both had 31 days credited for their full payments that were received.
Member 171 paid $20; this was only a part payment so he was not credited with any days on his membership.

Receipted: indicates the amount in dollars of contract payments that were finalised (paid in full and days credited). In this case this is made up of $130 for the two payments credited for member 1179 and $150 for members 1306 and 1237.
-Prev Received: shows the amount in part payments previously received but included in those payments Receipted. In this case it was $35 for member 1179
Un-receipted: shows the amount of part payments received on this receipt. There was only 1 part payment

received, from member 171 for this receipt.
Total Received: is the amount received in total.

You can hit the report button to obtain a report for print out of these details.
Other batches can also be viewed from this screen. You can also return to it at any time by clicking the show previous payments button.

External Contract Payments report

Pressing Report on the Contract payments Processed screen will display the following report of all contract payments included on a Batch.
You can see more clearly on this report how the payments for member 1179 were broken down

External Contract Payments Received

Seido Juku Karate Geelong Australia

Receipt - 10 ***Processed: 28-Jul-99 July Payments***

ID	Name	Amount	Days credited	Paid to	Current due date
1179	Balt - Steve	$30.00	30	10-May-99	10-Jun-99
1179	Balt - Steve	$65.00	31	10-Jun-99	10-Jun-99
1306	Big - Christopher	$40.00	31	15-Aug-99	15-Aug-99
1237	Birett - Melissa	$110.00	31	10-Jun-99	10-Jun-99
171	Black - Lain	$20.00	0	15-Oct-98	15-Oct-98
	TOTAL RECEIVED:	**$265.00**			

Further notes on contract payments

Missed Payments: If you find that you have missed a payment you can add it into the already processed batch by firstly creating a new batch containing only the missed payments then with the Combine contract receipt function add it into the receipt it was missed from.
Extra Payments: If you find that you have added in payments that should not have been included in the batch these can be removed with the remove contract payment function.

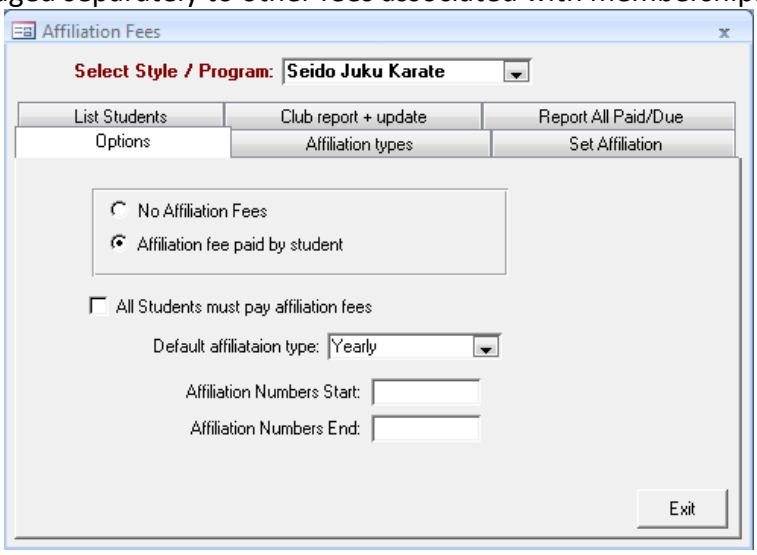
With the use of these functions combined you should be able to keep your records accurate and up to date. Highlighting any errors or omissions on the part of the external company, while keeping accurate records of all your members' payments so as to be able to accurately answer any queries or concerns they may have.

Affiliation Fees

FUNCTION: Provides various functions to allow you to manage Affiliation fees.

USE: If you have affiliation fees use this to track them, payments received from members are received through the Receive Fees screen.

Affiliation Fees are payed by many organisations to a governing body. The collection and tracking of these fees is managed separately to other fees associated with memberships.



The Options page allows you to select if Affiliation Fees will be used. If affiliation fees are payed there are two ways these can be managed.

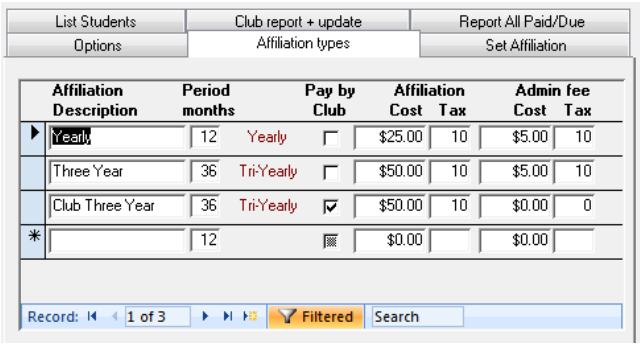
1. Payed by Members, these are collected and passed on to the governing body. An accounting fee may be deducted before reporting collected amounts if desired.
2. Fees can also be payed by club on behalf of members. In this case fees to be payed by club will be reported and recorded.

If you are using affiliation Fees then you may force all member records to have affiliation fees associated with them by checking check box on page. You may also select the Affiliation type to default members to.

Affiliation Types

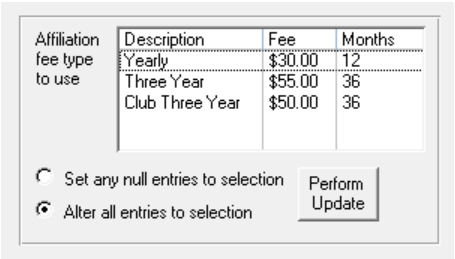
Description should allow identification of affiliation type.

Period is entered in months, for most standard length periods a description will be displayed for the period length. If you select the Pay by Club option then no payment is received against this when paying it, it will be recorded as an expense in financial reports (not an income amount).



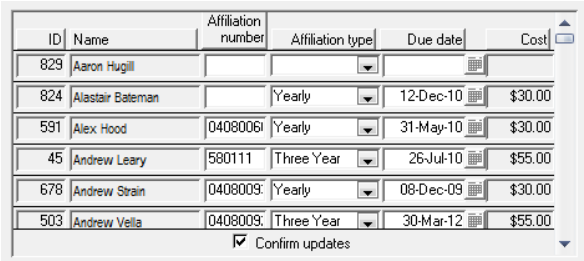
Set Affiliation

This option allows you to do a bulk update of Members affiliation fee types. This is most useful if the due date of fees is determined by when new members fees are first paid. You cannot assign a due date then update all null entries in one go.



List Members

Lists all members, Affiliation number, type and due date. You can update Affiliation numbers, types and due dates in this panel.

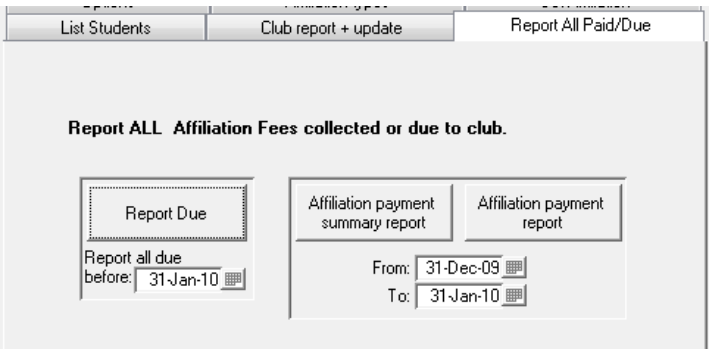


ID	Name	Affiliation number	Affiliation type	Due date	Cost
829	Aaron Hugill				
824	Alastair Bateman		Yearly	12-Dec-10	$30.00
591	Alex Hood	0408006	Yearly	31-May-10	$30.00
45	Andrew Leary	580111	Three Year	26-Jul-10	$55.00
678	Andrew Strain	0408009	Yearly	08-Dec-09	$30.00
503	Andrew Vella	0408009	Three Year	30-Mar-12	$55.00

Confirm updates

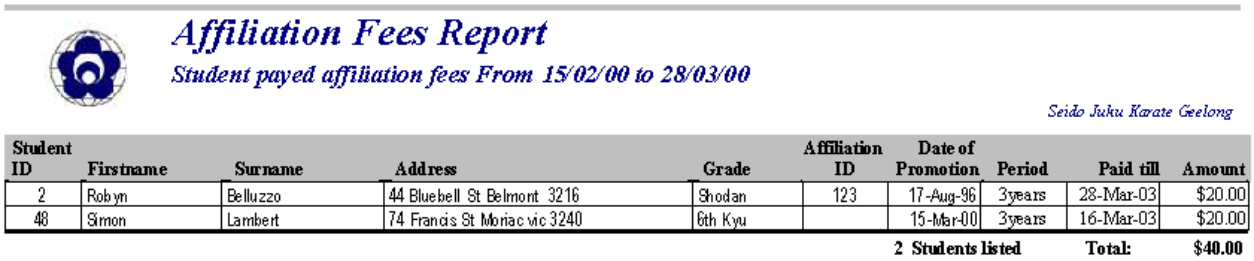
Report Paid/Due

These reports will allow you to track fees due (can also be done from fees due reports) then report those processed and finally produce a formatted affiliation fees payment report.



When producing the affiliation payment report you can enter in an Accounting fee amount that will be deducted from each received payment prior to printing .

Club report and update



Affiliation Fees Report

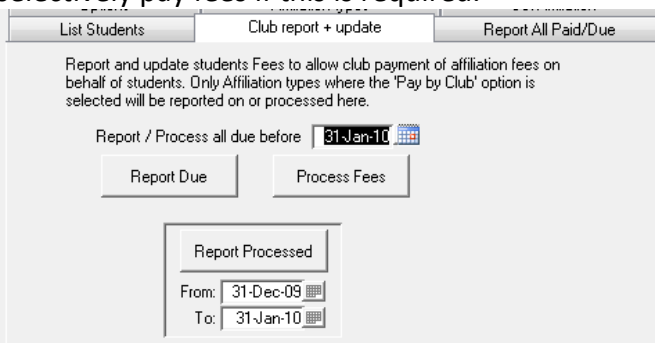
Student payed affiliation fees From 15/02/00 to 28/03/00

Seido Juku Karate Geelong

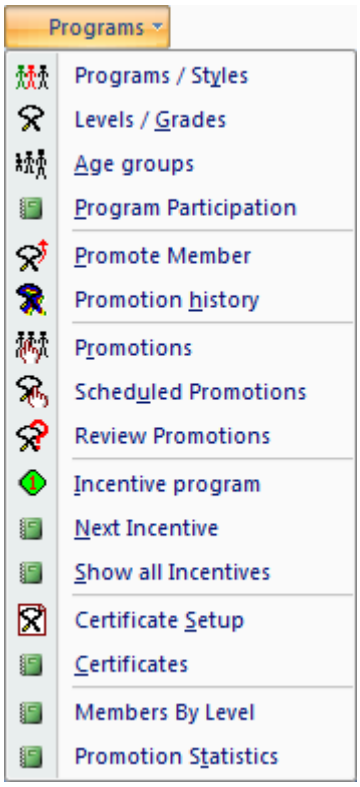
Student ID	Firstname	Surname	Address	Grade	Affiliation ID	Date of Promotion	Period	Paid till	Amount
2	Robyn	Belluzzo	44 Bluebell St Belmont 3216	Shodan	123	17-Aug-96	3years	28-Mar-03	$20.00
48	Simon	Lambert	74 Francis St Moriac vic 3240	6th Kyu		15-Mar-00	3years	16-Mar-03	$20.00
						2 Students listed		Total:	$40.00

If club paid fees are selected then these are paid through this screen, all members with an affiliation date of less than that entered will be processed. Individual receipts will be produced for each member. These are recorded as a negative amount this allows financial tracking of these payments against fees collected etc.
The affiliation payments report will provide all details in the same format the member paid affiliation fees report shown above.

When processing fees you can request confirmation of fee to be paid for each member. This allows you to selectively pay fees if this is required.



NOTE: it is possible to use a combination of both methods to pay affiliation fees. However you will need to produce separate reports, for club and member paid fees.



Grades menu

Styles + Programs, Grades + Levels and Age Groups allow you to divide up your members for reporting and management purposes.

If you do not have the professional version of Club Administrator you will not have the option to set up Styles + Programs.

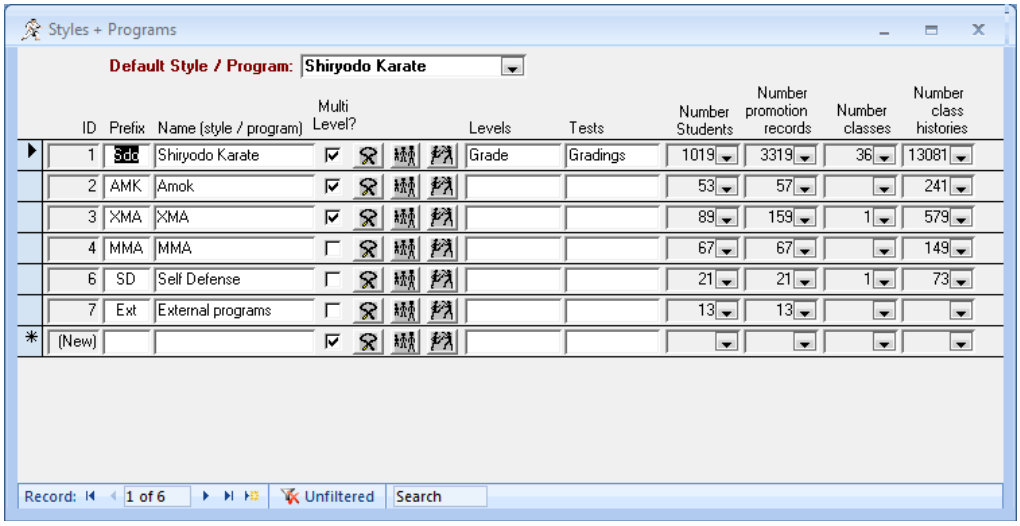
Where members are promoted within a program you can use the promotion options to manage this and certificates option to issue members certificates.

If you also run an incentive program (eg. Issuing badges for attendance) these can be tracked against a Style or Program.

Programs / Styles

FUNCTION: Screen for set up of Styles or programs and default program.

USE: If you want to track membership of different programs you set up the programs here.



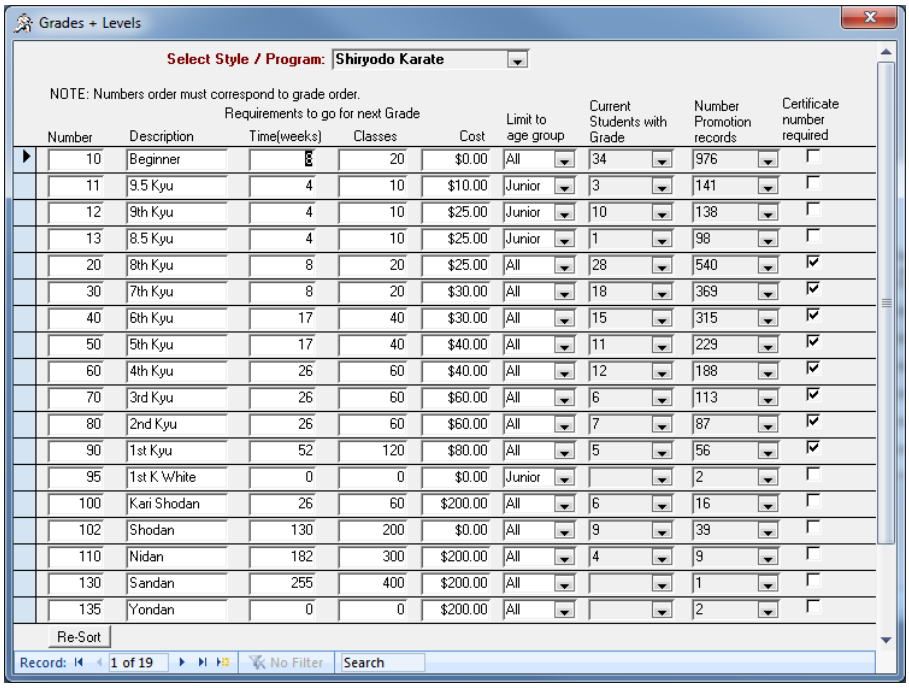
Prefix: is used in some places where space does not permit the full name to be used.
Name: a descriptive name for the style or program should be entered. This will be used to identify program.
Multi Level: if you are going to have more than one grade / level or age group associated with a program you need to select this check box.
Levels: enter the description for what Grades / Levels are referred to as.
Tests: enter the description for what promotion exams are called.

The remaining fields give you statistics about the program.
In order to make the setting up of class types, levels and age groups easier icons to take you to these functions are provided with each record.

Levels / Grades

FUNCTION: The purpose of this screen is to allow maintenance of Grades and their requirements.

USE: Setting up grades and grading requirements allows you to easily manage grades and levels.



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	34	976	☐
11	9.5 Kyu	4	10	$10.00	Junior	3	141	☐
12	9th Kyu	4	10	$25.00	Junior	10	138	☐
13	8.5 Kyu	4	10	$25.00	Junior	1	98	☐
20	8th Kyu	8	20	$25.00	All	28	540	☑
30	7th Kyu	8	20	$30.00	All	18	369	☑
40	6th Kyu	17	40	$30.00	All	15	315	☑
50	5th Kyu	17	40	$40.00	All	11	229	☑
60	4th Kyu	26	60	$40.00	All	12	188	☑
70	3rd Kyu	26	60	$60.00	All	6	113	☑
80	2nd Kyu	26	60	$60.00	All	7	87	☑
90	1st Kyu	52	120	$80.00	All	5	56	☑
95	1st K White	0	0	$0.00	Junior		2	☐
100	Kari Shodan	26	60	$200.00	All	6	16	☐
102	Shodan	130	200	$0.00	All	9	39	☐
110	Nidan	182	300	$200.00	All	4	9	☐
130	Sandan	255	400	$200.00	All		1	☐
135	Yondan	0	0	$200.00	All		2	☐

Note: The Beginner grade must always be the lowest number and it is always set to 10.

The other grades should then be given numbers to correspond to their order. That is a lower grade has lower numbers and higher grades have higher numbers. All numbers need not be used the order is all that counts not the actual number.

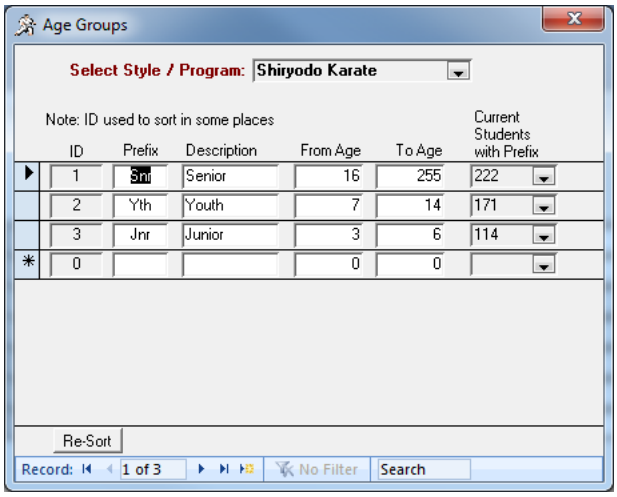
The Time in weeks and classes will be used to check if member has met requirements for grade when scheduling member to grade and grading member. The Cost will be displayed as the default grading cost for members when being promoted to this grade. The certificate required flag will cause the default to be that a certificate number will be issued for members when grading to this grade.

There is also a “limit to age group” this allows you to set up grades that are only valid for a specific age group. In the example shown there are 9.5 kyu -8.5 kyu grades that are only available to Junior members. When scheduling promotions for promoting members only Juniors will have these grades shown.

Age Groups

FUNCTION: Set up your age groups for programs.

USE: Setting up age groups allows you to easily manage age group based classes as separate programs.



The from and to Ages allow the correct age group to be set automatically when adding a new member or adding a member to a program. Transferring from one age group to another can be done either through the alter member screen or by promoting the member.

Program Participation

FUNCTION: Report on overall participation in programs.

USE: Provides a snapshot of members and attendance across programs broken down by age groups and male / female.

Program Participation

Ashihara Karate

Ashihara Karate

Senior Members *54 Males 23 Females Total: 77*
Weekly Attendance: *129.1* % of *55.49%*

Youth Members *34 Males 19 Females Total: 53*
Weekly Attendance: *88.1* % of *37.88%*

Junior Members *13 Males 3 Females Total: 16*
Weekly Attendance: *15.4* % of *6.63%*

Members: *101 Males 45 Females Total: 146*
Weekly Attendance: *232.6* % of Club: *95.19%*

XMA

Members: *19 Males 12 Females Total: 31*
Weekly Attendance: *11.8* % of Club: *4.81%*

External programs

Members: *6 Males 4 Females Total: 10*
Weekly Attendance: *0.0* % of Club: *0.00%*

Grand Total Attendance: *244.4*

In the example above you can see there are three programs set up, a core Karate program that accounts for 95% of attendance. An XMA program that accounts for 5% of attendance and

External programs (these may be programs such as running self defence classes for corporate or school groups that do not get attendance recorded but are entered as clients to allow invoicing and other functions).

Promote Member

FUNCTION: Sets the members grade when they are promoted.

USE: When a member is promoted / graded use this form to record this.

The next grade for member will be displayed as the obtained grade automatically but this may be altered if required.
If entered directly off the menu the members name or number must be entered.

Member details will be displayed, their grading requirements are displayed as entered in the Grades list next to what the member has achieved. If Grading Fees are due then they are shown here also. See Below for more info on grading fees.

You should ensure the actual date of the Grading is entered in the Date Graded as this is used to calculate what classes the member has attended since grading.

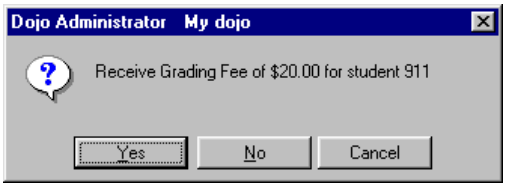
Upon pressing Promote Member you will be warned if member does not meet grading criteria and asked to confirm request.

A unique Certificate Number will then be supplied for use on grading certificates if this option is selected. The default for each Grade is entered on the Grades screen but may be altered here if required.

The Review Dates option takes you to the Members Grading Dates screen.

Receiving Grading Fees

On the promote member screen enter the amount being received and then <enter> and a confirmation request such as shown will be displayed.



If you receive a payment using method 1 then it must be done at the time of grading, as when you exit the screen and re-enter amount will not be recorded on screen. It will be assumed that by entering the amount and then exiting without promotion that the member failed the grading. That is unless you entered the screen from the Grading screen and so the member is scheduled to attend a grading for the grade. In this case the amount will be recorded against this grading the same as if it were entered in the Members Grading dates screen.

Promotion history

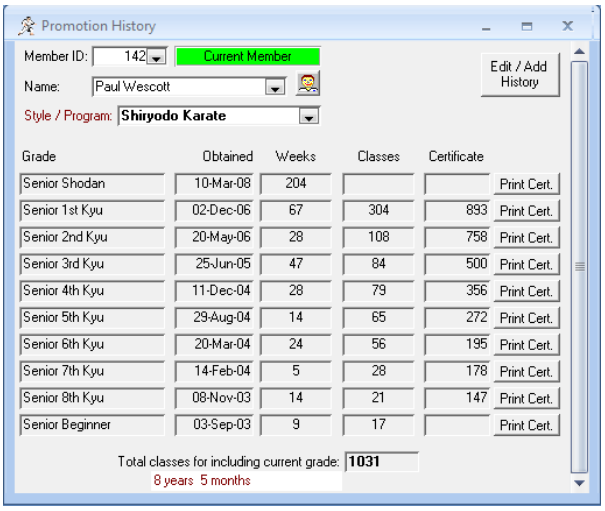
FUNCTION: Shows and promotion history and provides access to edit it.

USE: If you wish to view or alter the promotion histories for a member use this screen.

Displayed are the Grade, the date it was obtained and the total number of classes done at this grade (if it is completed). If a certificate number was issued this is also displayed.

To edit or add promotion history details click the Edit / Add History button. All fields will be made enterable. However you must enter the dates obtained in order of Grade.

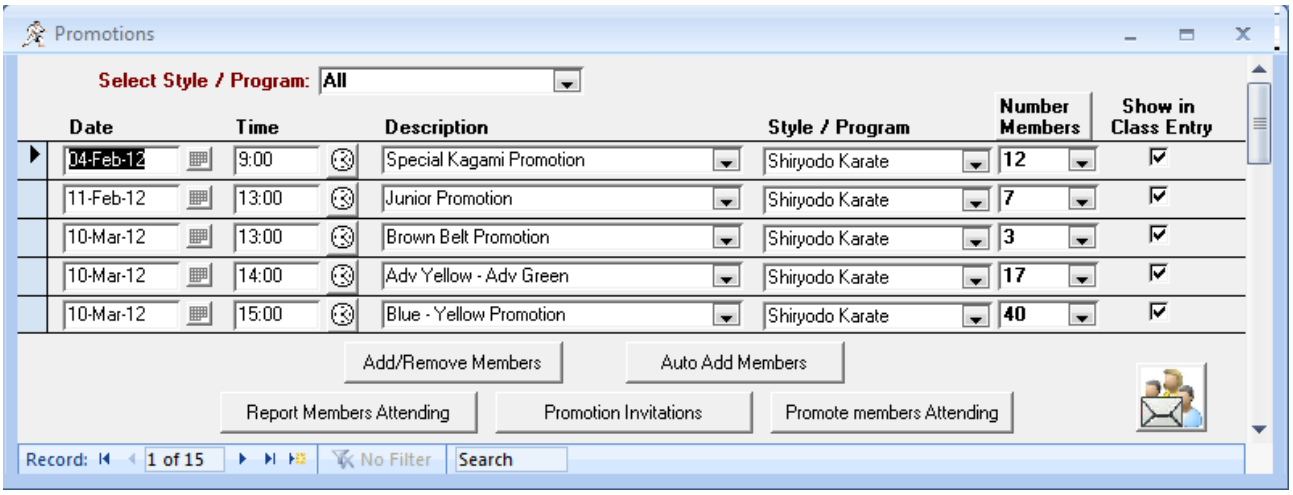
NOTE: if you edit the promotion history you will not be able to change the details for the current grade, to do that you must use the alter member screen.



Promotions

FUNCTION: Create and list promotion, add members report on them and promote members.

USE: Set up promotions and assign members to them to track when members will be due to grade.

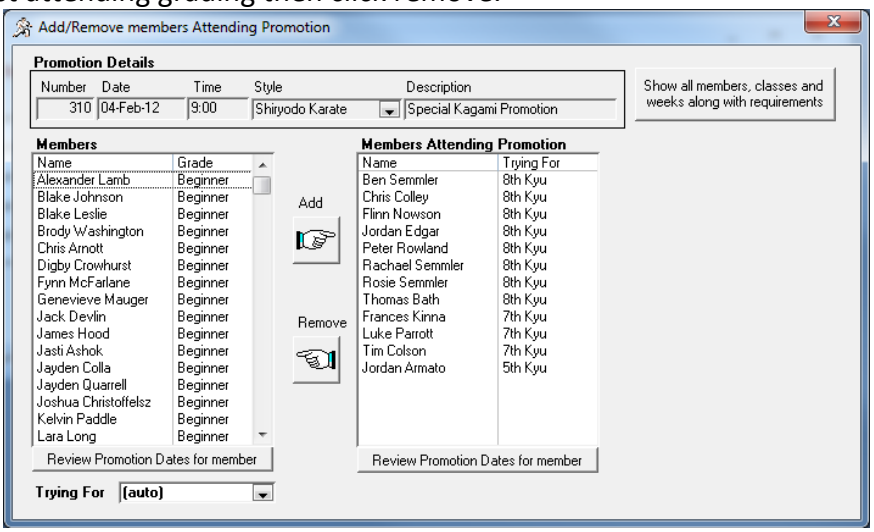


This screen is where you initially set up Promotions. You must enter a date for each promotion. Time and description are optional but description is recommended to enable easy identification of Promotion.

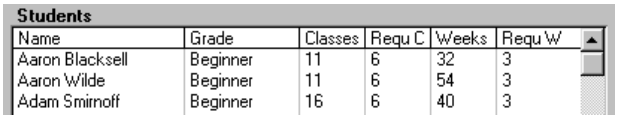
Add Remove Members

Press Add/Remove Members button to manually add and remove members from the promotion. This screen allows you to enter members into and remove them from a selected promotion. As you may want to reschedule members to grade the easiest way to do this is to select the member from the list then click Review Grading Dates for member. This will bring up the Gradings for that member and allow you to remove them from the current one and add them to a new one or what

ever is required. To add member select member from “Members” and click Add. To remove select member from list attending grading then click remove.

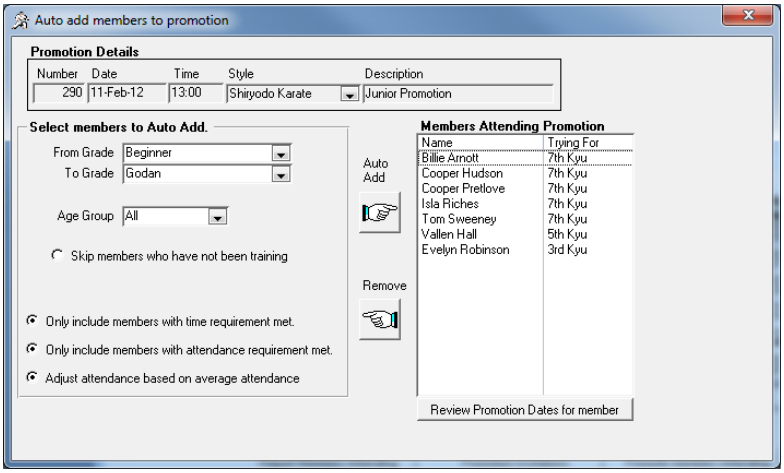


If you select the top right button then this will show the members classes and weeks since graded. Before this list is displayed you will be given the option of excluding members who will not have been graded for long enough to be eligible to grade and those who do not have the required classes. Then the list of members will be altered to the format shown. Listing Classes attended, required classes to grade, weeks since grading, required weeks to grade.



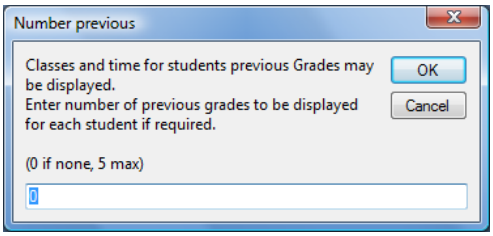
Auto Add Members

Press Auto Add Members button to use various criteria to automatically identify those members eligible for promotion. When this screen is opened the Style set in the promotion will automatically be assigned to limit members. You can then set the grades or levels and age group(s) of members eligible for this promotion. The other criteria automatically identify those eligible to attend based on the required weeks and classes set up in ‘Grades – Grades & Levels’. You can also elect not to include members who have not attended for a specified period of time.



Report Members Attending

To report the members attending the promotion click Report Members Attending. You will then be prompted if you would like to display members previous promotion history records. Leave as 0 to only display the current promotion or set a number of previous promotions you would like displayed.



This report lists all those members in the selected Grading,

Level tests for 27-Sep-99

My dojo

ID	Name	Age	Grade	Attended	Classes Required	Graded	Time Required
Trying for:	**3rd Kyu L2**						
524	Robert Mulligan	43	3rd Kyu L1	**15.5**	12	17-Aug-99	**(5)** 6
			3rd Kyu	*16*	*12*		*(7)* *6*
			4th Kyu	*93*	*10*		*(110)* *5*
Trying for:	**Beginner L1Jnr**						
1211	Jane Richardson	5	8th Kyu L1	**2**	8	01-Oct-99	**(0)** 4
			8th Kyu	*11*	*8*		*(6)* *4*
			Beginner	*46*	*6*		*(25)* *3*

Summary for Level tests (2 Members)

Averages Age ***24*** Classes ***8.7*** Weeks ***3.5***

Promotion Invitation Report

The function provides promotion invitations that can be handed out to members prior to promotion. You can use the 'HouseKeeping – Text Entry' Screen to update the information that will be displayed on this report tailoring it to your organization. This report is a great way to keep your records up to date as member details are printed on it and they can update these if they have changed. In this way when you receive back a promotion invitation with an alteration to the email address this enables your records to be kept up to date.

Promotion Invitation

Seido Karate - Grovedale

Member ID: **657** *First name:* **Cynthia** *Surname:* **Weggelaar**

Can you please confirm all details below are correct. Put a line through any details that are not and write in all correct or missing details.

Address: 858 Pioneer Road Grovedale Vic 3216

Phone Home: 52432336 *Work:* *Mobile:* 0439956549

e-mail: rain2001@yahoo.com.au *DOB* 03-Jul-74

Please confirm all fees are paid up to date.

Membership Type: Direct Debit $53

Affiliation ID: 580427 *Affiliation Type:* Three Year
Affiliation Fee: 57 *Due:* 28-Jul-10

Promotion requirements:
==========
* Members must know required syllabus for level.
* Technique must be of adequate standard.
* Members must have completed required number of classes.
* Payment and application must be submitted 2 days prior.
* All membership fees must be up to date.

Following are not required for 4-7 years dragons until attempting Blue Belt.
* Member must have Gi with Seido Patches on it .
* Must have current international membership (affiliation fee: 1 year $30, 3 years $57)
* If attempting Green belt or above a written essay is required see Sensei Malcolm for topic.

Promotion invite + Fee MUST BE RETURNED 7 days BEFORE PROMOTION or a LATE FEE of $10 must be paid.

Brown & Above - 04:00 PM Saturday, 16 January 2010
***Trying for:* Senior 2nd Kyu**

Cost: $60.00 *Date Last* 07-Feb-09
Time Requirement (weeks): 26 *Weeks Graded:* 49
Class Requirement 60 *Classes Graded:* 142
Estimated Classes: 149

The member hereby releases, discharges and absolves SEIDO JUKU KARATE its agents and employees of and from any and all liabilities and responsibility for any and all accidents and/or injuries the member may sustain during his promotion, or at any time while training in or out of the dojo (training hall) once promoted, whether the same are caused by or attributed to the negligence of SEIDO JUKU KARATE or the negligence of its agents and/or employees.

Date: ..... / ..... / ..... Signed: .....

cut here and retain for your records

Promotion Invitation

Member ID: 657 *Name:* Cynthia Weggelaar
Brown & Above - 04:00 PM Saturday, 16 January 2010
***Trying for:* Senior 2nd Kyu**

Promote Members Attending.

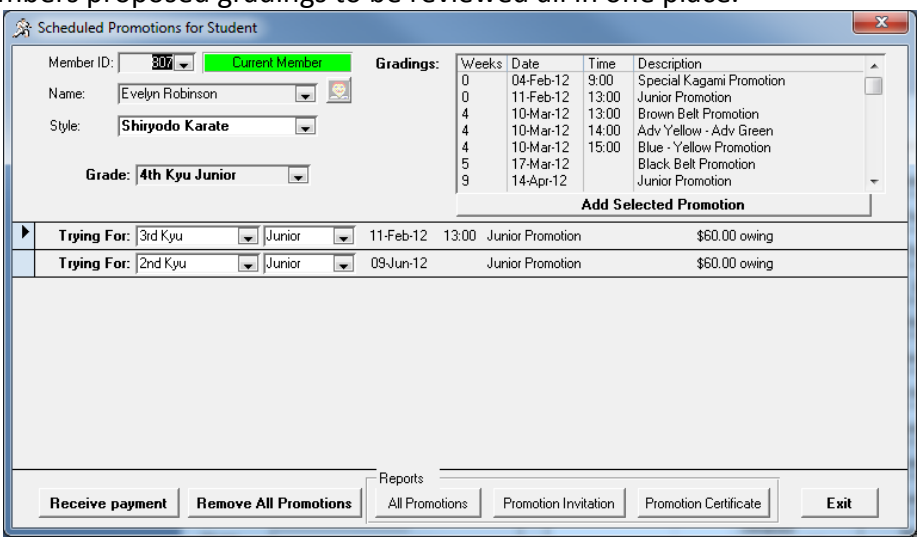
To promote members in the promotion press the Promote Members Attending button. You will then be given the option of promotion individual members or skipping over them. You will also be given the option to review proposed gradings, if you select yes then the Scheduled promotions screen will be opened for each member after you promote or chose not to promote each.

Scheduled Promotions

FUNCTION: Schedule promotions.

USE: Set up promotions and assign members to them to track when members will be due to grade.

This screen can be entered directly off the main menu, from the Promote Member screen or from the add remove members from Grading screen it is also available from the View member screen. It allows the members proposed gradings to be reviewed all in one place.



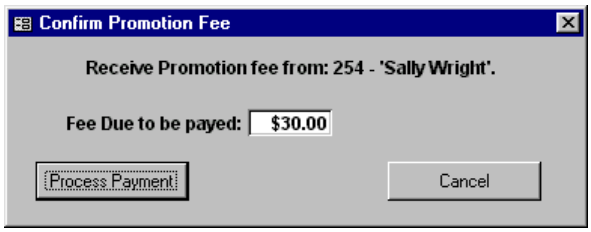
To add member to a promotion select the promotion from the promotion list. Then click Add selected Promotion. Grade member is trying for will be set automatically but you can then alter it if required.

To remove member from promotion you select the promotion by clicking on the box on the left side so the words "Trying for:" then click delete. Or click Remove All Promotions to remove them all.

You can also receive promotion fees for promotions members will be attending by selecting the promotion and clicking Receive Payment

Receiving Grading Fees

Select the row for which you wish to receive the payment and click Receive Payment. A confirmation request will be shown. You may alter the fee to the amount that is being received.

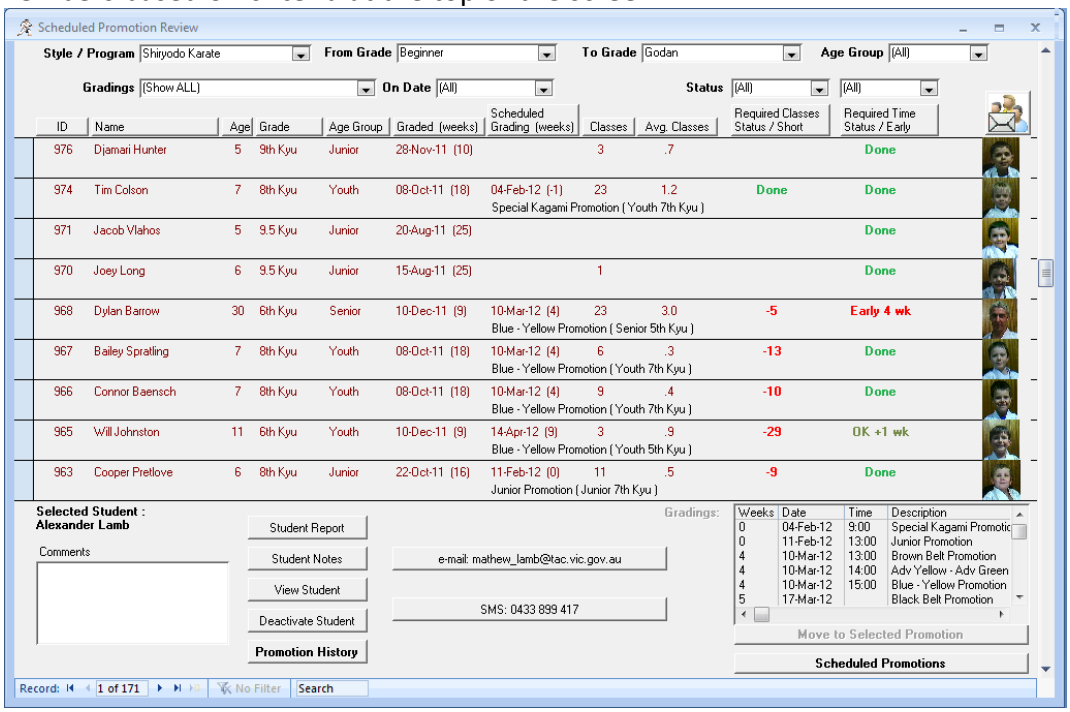


Review Promotions

FUNCTION: Check which members are on track for promotion.

USE: You can review the attendance of members and assign re-assign to then to promotions.

Lists all members based on criteria at the top of the screen.



In the Required Classes Column you can easily see if someone is on track to do the required classes for promotion. Class Statuses displayed:

- **-99** Tells you how many classes short they will be at the time of the promotion.
- **Not In** Attendance records indicate they have not attended recently.
- **Done** They have already done the required classes.
- **On Track** Based on their current attendance they should do enough classes before the promotion.

Likewise the required time column makes it easy to see if the promotion they are in is correct for their time requirements.

- **Early 9 wk** the promotion they are in means they will be promoting this many weeks early.
- **Done** they already meet the time requirements.
- **OK +9 wk** at the time of the promotion they will have done the required time plus the number of weeks stated.

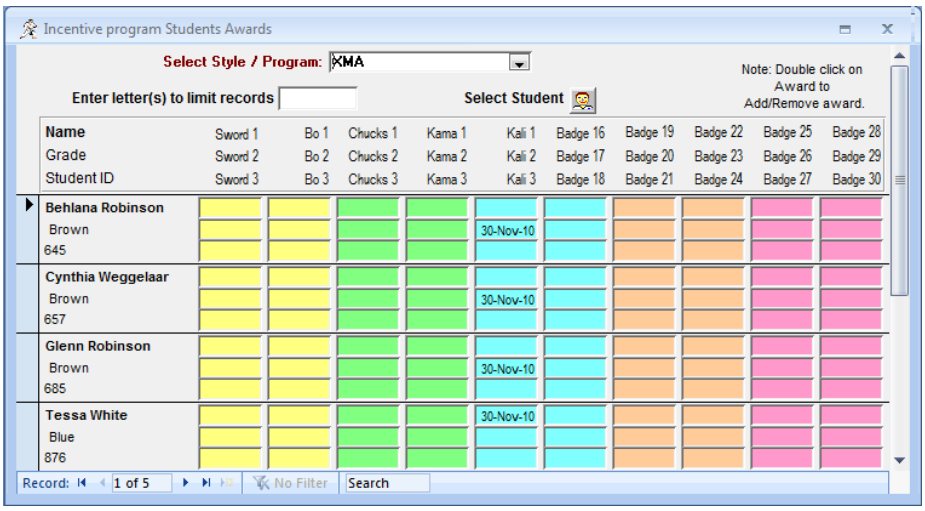
If a member is scheduled for a promotion you can move them to a different promotion by selecting it from the list at the bottom of the screen and click “Move to Selected Promotion”. If they are not scheduled for a promotion click “Scheduled Promotions” to open screen to assign them to a promotion.

Incentive program

FUNCTION: Records incentives issued to members.

USE: An incentive program provides additional goals for members to work towards, use this to record these.

Members in the incentive program can have the details of their awards obtained recorded in here. Awards are recorded by program so you can have separate awards for your different programs.



You can enter all or part of a members name to display that / those members starting with these letters. To award an incentive simply double click the box and today's date will automatically be entered in as the issue date or type the issue date in your self (double click again to remove). You can alter the description of the award by double clicking on the description and entering details as prompted.

Next Incentive

FUNCTION: Reports incentives that members are due to receive next.

USE: If you are using an incentive program and issue incentives in an order this will indicate which member is due to try for.

Incentive program report

Seido Juku Karate Grovedale

Style / Program: Seido Juku Karate

Grade	***Member***	***Age***	***Class/Week***	***Last Class***	***Date last award***
Eligible for: ***1 - Punches***					
Junior 7th Kyu	24 - Natalie Smith	10	0.29	30-Jan-02	
	42 - Niamh Harrington	8	0.63	30-Jan-02	
	31 - Taylor Graham	9	0.00	19-Dec-01	
		Total eligible for Award ' 1 - Punches' (3 Members)			
Eligible for: ***2 - Kicks***					
Junior 2nd Kyu	25 - Cassie Ayles	13	0.75	19-Feb-02	30-Jul-01
Junior 6th Kyu	29 - Heath Hudson	11	0.00	17-Dec-01	27-Aug-01
		Total eligible for Award ' 2 - Kicks' (2 Members)			

Show All Incentives

FUNCTION: Report of all incentives, similar layout to Incentive screen.

USE: If you are not issuing incentives in order this report will allow you to easily see which incentives are still available to members.

Certificate Setup

FUNCTION: Provides access to set up the layout of certificates.

USE: If you wish to issue promotion certificates to members you can design them in this screen.

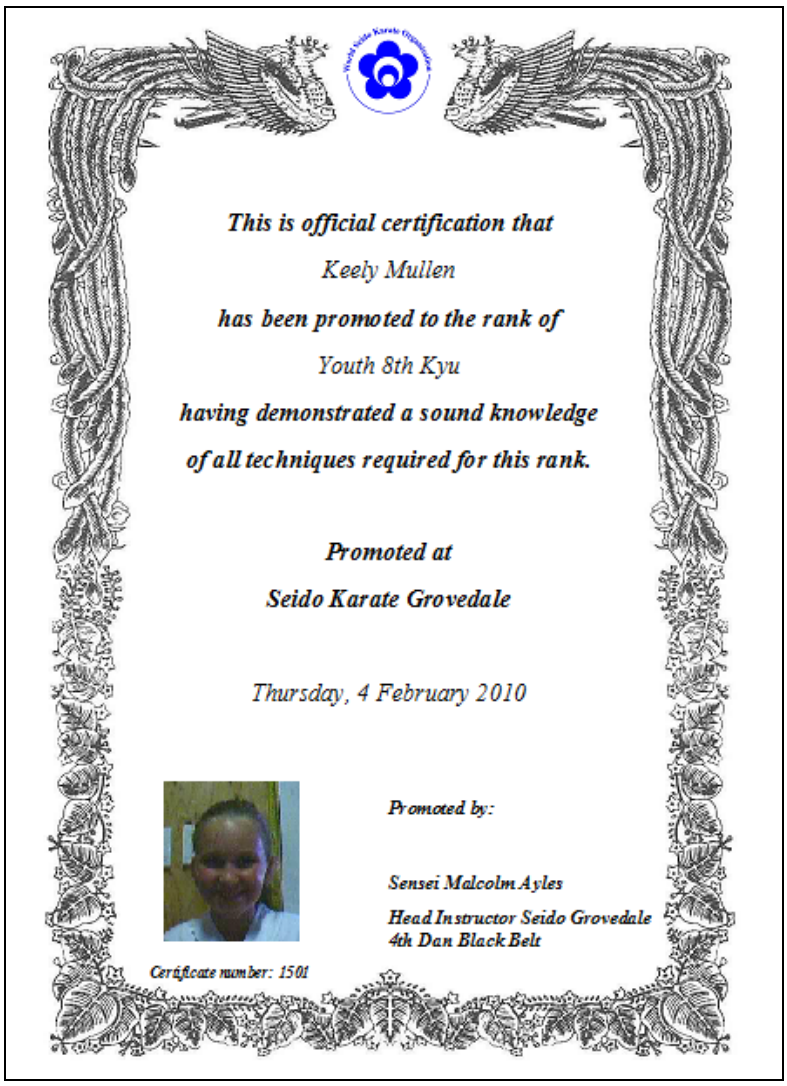
This screen allows you to format grading certificates to your own needs. Supplied with the software is the file, Cert.jpg in the Sample Graphics folder. This graphic contains a traditional dragon edge border for adding to your certificates. You may use it or add your own. You can also set the wording on the certificates (wording must fit within the provided space). You will see the layout as you create it, once you are happy with it you can use the certificates report to produce certificates.

Certificates

FUNCTION: Provides report of all promoted or provides promotion certificates.

USE: You can print promotion certificates to give to members or check who graded on a certain date.

Once you have selected the date to report on and request the report you will be prompted for the sort of report you want. You can either produce formatted certificates, as set up in the Certificate setup screen. Or a report that lists all members who were promoted on the specified date and their certificate numbers if one was issued.


This is official certification that
Keely Mullen
has been promoted to the rank of
Youth 8th Kyu
having demonstrated a sound knowledge
of all techniques required for this rank.

Promoted at
Seido Karate Grovedale

Thursday, 4 February 2010

Promoted by:

Sensei Malcolm Ayles
Head Instructor Seido Grovedale
4th Dan Black Belt

Certificate number: 1501

Certificates for 26-Jan-02

Seido Juku Karate Grovedale

Grade	Member		Certificate
Style / Program: Seido Juku Karate			
Senior 2nd Kyu	90	Rob Maxwell	455
Senior 5th Kyu	126	Julian Wilson	454
Junior 7th Kyu	142	Fran Harrington	453
	159	Ned Smith	452

Members by Grade

FUNCTION: Provides report of members by Grade / Style.

USE: Provides a list of members in Grade / level order that can be used for any training event associated purposes.

This report lists all members by Grade, showing details of when they last graded and their attendance since then.

Members By Grade Report

Seido Juku Karate Grovedale

All Styles / Programs

Style / Program: ***Seido Juku Karate***

ID	Name	Graded	Since Grading Classes	Since Grading Weeks	Last trained	Age	Sex
Grade	**Shodan**						
39	Kylie Meehan	10-May-97	29.5	252	14-Dec-01	28	Female
2	Michelle Ormond	11-Sep-99	105	130	11-Feb-02	30	Female
17	Andrew Oliver	16-Jun-01	24.5	38	19-Feb-02	17	Male
Grade	**2nd Kyu**						
25	Cassie Ayles	01-Jun-99	71	145	19-Feb-02	13	Female

Promotion Statistics

FUNCTION: Shows the statistics including average for promotions.

USE: This enables you to track how closely to your specified times members are tracking. This is an especially useful tool for comparing results across clubs.

Lists all grades and gives a statistical analysis of the number of classes and time that people have been on grade for prior to grading to the next grade. This provides a quick way to gauge if standard requirements are being met and how consistently.

Promotion Statistics

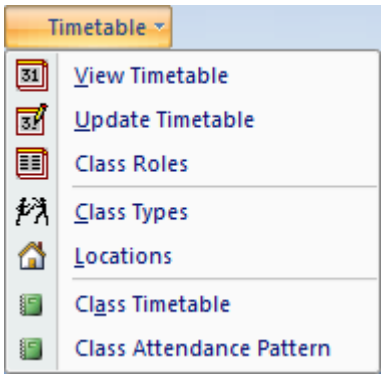
Seido Juku Karate Grovedale

For promotions since 15-Nov-01

Statistics are for grades completed (i.e. number of weeks / classes completed on grade).

Style / Program: ***Seido Juku Karate***

Grade	Number	Classes Avg	Classes Max	Classes Min	Classes StDev	Weeks Avg	Weeks Max	Weeks Min	Weeks StDev
Beginner junior	1	**25.0**	25	25		**8.0**	8	8	
8th Kyu Junior	3	**16.0**	26	8	9.2	**8.7**	13	5	4.0
7th Kyu Junior	5	**23.0**	38	14	9.4	**10.0**	18	8	4.5



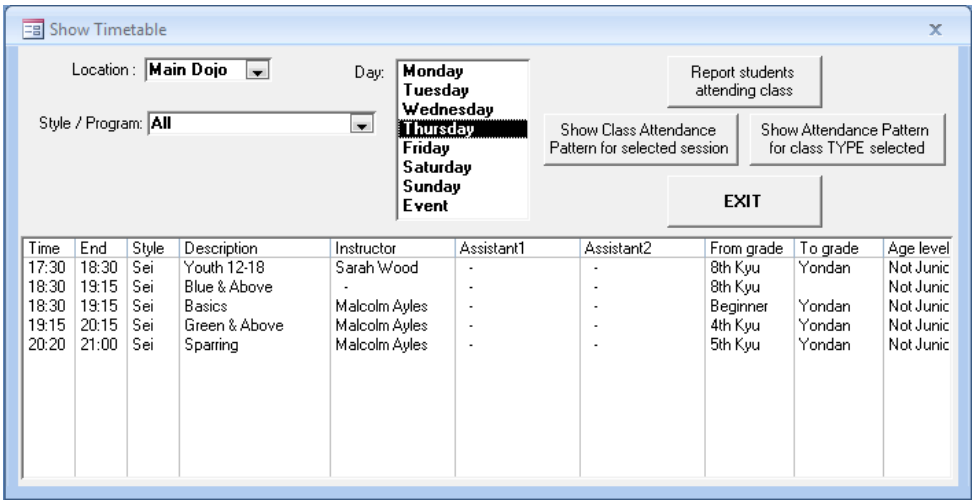
Timetable menu

Allows administration of timetables and related data.

View Timetable

FUNCTION: Displays timetable and allows reporting of attendance trends.

USE: View class schedule and look at attendance trends to identify opportunities or problems with timetable.



This screen allows you to look at who is attending a class on a week-to-week basis by Clicking Report Members attending class. It also provides you with graphs of attendance for this specific class and all classes of a specific type.

To select a class first select the location then the Day (or event for one off classes) all those class for the entered criteria will then be displayed in the list for you to choose from.

Update Timetable

FUNCTION: Allows creation and maintenance of timetable.

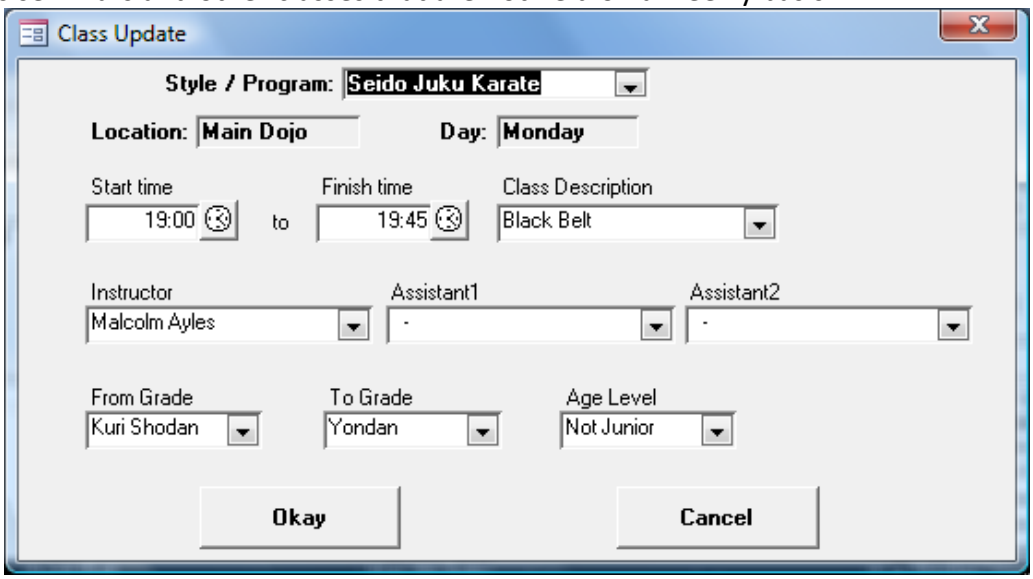
USE: This screen is used to create and maintain the class schedule.

Navigation is the same as for the View Timetable screen. Once a class is selected then functions can be performed on that class.

To Delete a class, select Class from list and Click DELETE selected class.
To Add A Class Click ADD class. Class Update screen will then be displayed with all but location and day blank. To Alter class details Click UPDATE class and Class Update screen will be displayed with currently selected classes details for update. You can now enter details for class; if from or to grade are omitted then these will be all by default.

There are two types of classes, weekly classes and single day events:

- For weekly classes enter class details in appropriate weekday.
- If Class is a single day EVENT then date must be entered. EVENT should be used for recording, camps seminars and other classes that are not held on a weekly basis.



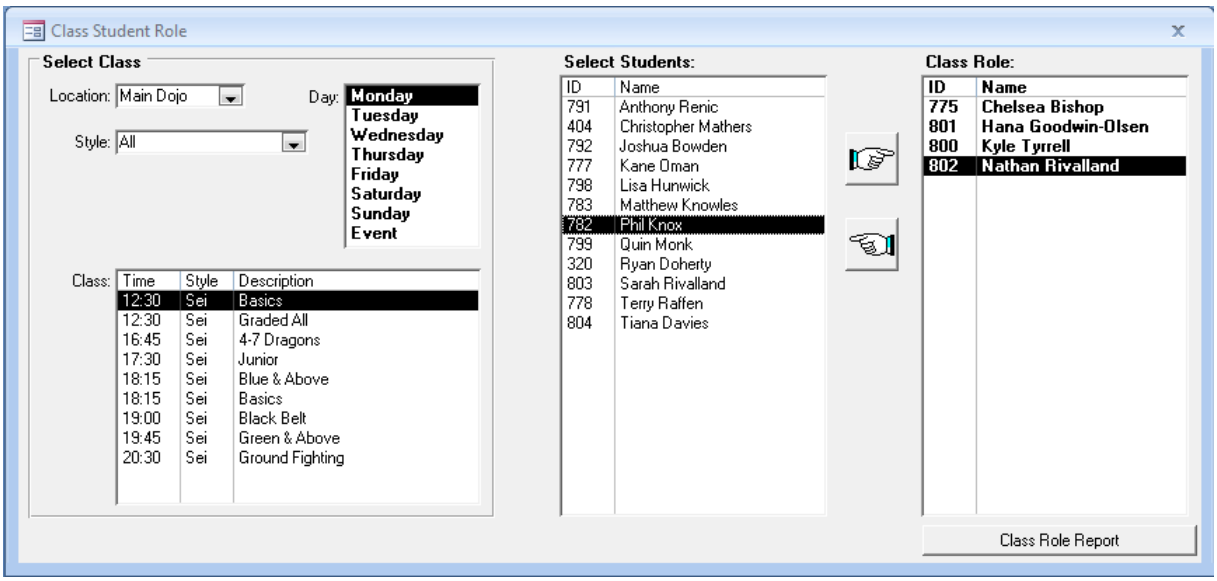
If you have classes that are of a recurring nature but not on a weekly basis. A monthly class for example, you have two options, you can enter it as a weekly class, and provided there is no attendance recorded against this class no record will be created for it. Or you can enter it as an event then update the date each month after the class has passed. Another alternative is to set up a dummy location (eg. hold) and then on weeks a class is not to occur you can change the location to hold so as it is not displayed in the class entry module.

Class Roles

FUNCTION: Set up and maintain an attendance list for a specific class.

USE: Class roles are used to maintain a list of members assigned to a specific class. This is useful where space or teacher – member ratio's dictate limiting a class to a specific number, or where members pay to attend a specific class.

When you open this screen and select a specific class the members eligible to attend that class, based on age group and levels set for this class will be shown. You can then select members from this list and add them to the class role.



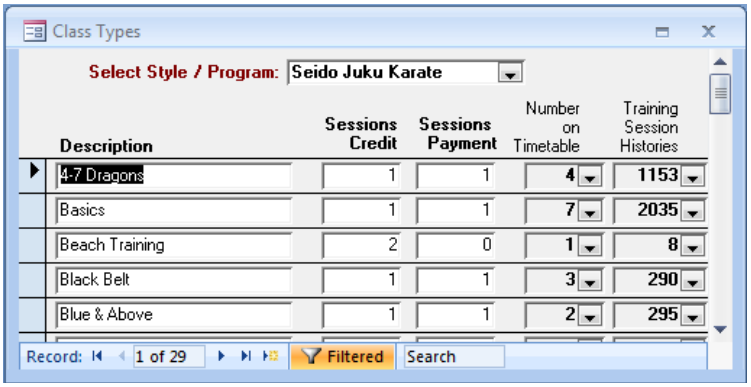
The class role is then used in the attendance entry screen to show the members who can attend the class, and can also be used to charge those who do not attend.

Class Types

FUNCTION: Set up and maintain class types used in setting up classes.

USE: Class types need to be set up for each type of class you want listed on your timetable. .

A new class type can be added by moving to the end of all records and entering details in the blank bottom line



To alter records simply enter the new details. Altering the description will update the description for all classes of this type that have occurred. Like wise updating Sessions Credit will cause re-calculation.

Sessions Credit indicates the value members will be credited with for attending this type of class. If this value is altered for an existing class type then classes that have already occurred will also be credited with the new value.

Sessions Payment is the number of classes that members on class-based memberships have charged to their membership. For example if a class has a class value of 1.5 then when a member attends the number of classes remaining on their membership will be reduced by 1.5.

You can only remove class types if there is none of this type on timetable or with existing histories. To remove type select row by clicking on the box to left of description then press delete.

Locations

FUNCTION: Set up and maintain locations.

USE: Locations allow you to differentiate between classes held at different locations and display only classes for a location.

This screen will only be used if adding or removing a location. Multiple locations can be used to discriminate different training areas or training locations that are part of the one club. If you are using the class entry module the class location can be used to limit the classes displayed in the class entry module.

Class Timetable

FUNCTION: Provides report of classes on timetable for a given location

USE: Can be used as basis for timetable to issue to members.

This will display a report of all the Classes for location(s) / Style(s).

Main Dojo Class Timetable

Seido Juku Karate Grovedale

Day	Start	Finish	Description	Age group	From Grade	To Grade
Monday	05:00 PM	05:45 PM	Junior	Junior	Beginner	1st Kyu
	06:00 PM	06:45 PM	Beginner		Beginner	Beginner
	06:00 PM	07:00 PM	Combined Graded	Senior	8th Kyu	Sandan

Class Attendance Pattern

FUNCTION: Displays class attendance pattern week by week.

USE: Monitor trends in classes and take appropriate action.

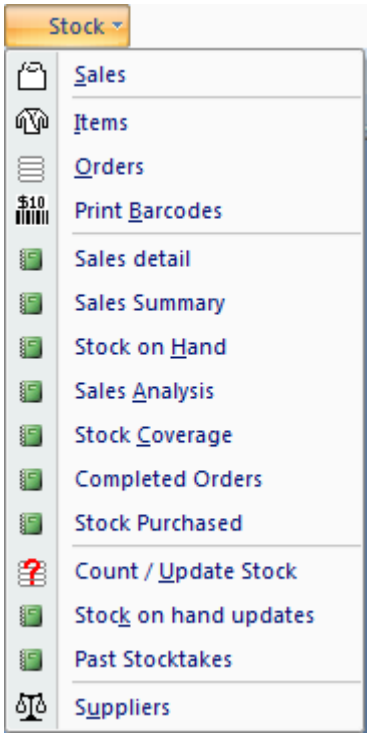
This will display a report of the entire class attendance pattern for all classes grouped by class type. You will be prompted to select report with instructors (shown below) or without. If this report were selected without instructors the 2 rows for each class would be combined into 1 and no instructor name shown.

This enables you to see trends, increases in attendance or drops in attendance. You can also see the effect of changes in class times, instructors and other factors.

Class Attendance Pattern from 28-Jan-00 to 09-Jun-00

Seido Juku Karate Geelong

Weeks ago:	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1	0
Class Type *Beginner*																				
Tuesday 5:50 PM Robyn Lambert												17								
Tuesday 5:50 PM Michelle Ormrod-Ayles											16		12		21	10	12	14	12	
Tuesday 6:30 PM Robyn Lambert			2	2	2	4	12	11	12	7										
Tuesday 6:30 PM Michelle Ormrod-Ayles	5	1																		



Stock menu

This menu contains merchandise functions.

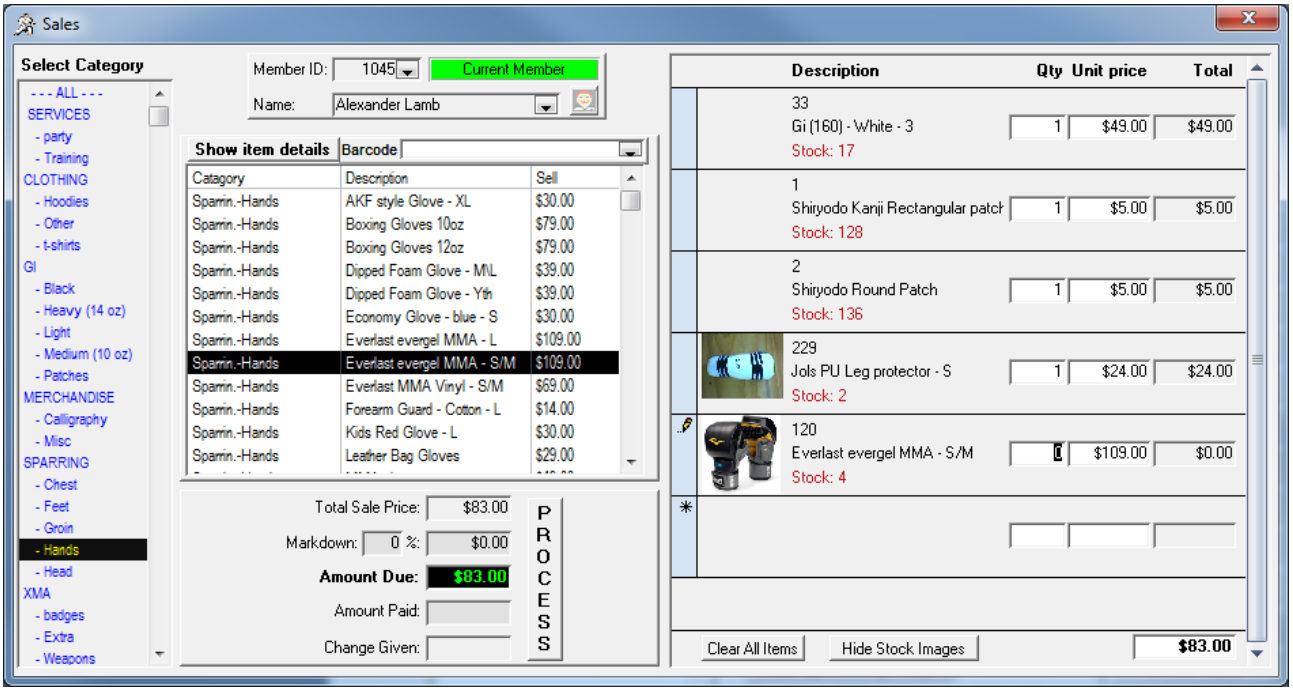
The merchandise functions cater for three primary types of goods:

1. Regular items that are bought in and sold to members such as uniforms.
2. Non-sale items, such as belts or training equipment that is regularly purchased, often on the same orders as sale items but not sold.
3. Services, where a fee is charged but there are no goods associated with payment.

Sales

FUNCTION: Record Sales.

USE: Here any sales are recorded; you can also record classes as sales where they are one off type classes such as private sessions or introductory classes.



You are able to record member's names against sales or you can leave member blank. If members name is recorded against sales then you have the ability to find details of sale by looking at payments made by member. If scanning barcodes tab to the Barcode field then scan barcode and item will be located, this will work for both supplier applied barcode or barcode produced from

application. On the left hand side all the Category / Sub Categories are listed to make it easy to locate items.

You can select items from the list or if you click "Show item details" then details including picture if one has been entered will be displayed. You can also enter keycode, product code or other information to find the product required.

Once the required item is selected enter the quantity and adjust the unit price if required. You can also discount sale by entering either a Percentage markdown amount or a dollar value markdown. When the sale is processed these markdowns will be recorded along with the items unit price.

The amount due is calculated automatically and if the Amount Paid is entered then Change to be given is also displayed. To complete a sale click "Process" if after doing this you need to reverse a sale enter all details again but with quantities as negative so as to reverse the sale.

A receipt will be created with details of sale. These details are viewed the same as receipts for Fees and other transactions.

Items

FUNCTION: Create and Maintain items.

USE: You can only make sales against items; here is where you set up those items.

This form also allows the creation and maintenance of Categories and sub categories as well as items within them. Categories and Sub-Categories allow items to be easily located.

There are two special categories and as many regular categories as you wish to enter.

1. Non Sale items – these items do not have stock values maintained or re-order levels as they are not sold, these items may be things such as training aids, belts and other items that you wish to include on purchase orders produced. These items will not appear for sale.
2. Services – items under this category cannot be purchased. A cost price is included to enable profit calculations and these items appear for sale but there is no stock levels maintained for them. This enables things such as camp fees, introductory classes or seminars to be collected and recorded.
3. Regular Categories – items in these will have stock levels maintained, can be ordered and sold. The majority of merchandise will be of this type.

Add Category or Sub-Category: To add a Category or Sub-Category click Add next to the appropriate level. Note: you cannot add a Category or Sub-Category with a description already in use.

Edit Category or Sub-Category: To alter description select description to be altered then click "edit".

Add Item: Select Category and sub Category you wish to add item to. Then go to the bottom of the listed items (clicking >* in the record selection box will take you there directly). Add details for item to be created.

Move item to another Category: Select item to be moved then click "Move item to new Cat" at top of screen. You can now select a new Category and Sub Category, then click "Set item Cat" to set new category.

Delete Item: Select the item by clicking the selection bar at the left of the item. Then press <Del> on the keyboard to delete it. If an item has sales or orders associated with it then you will not be able to delete it.

Item details

You may enter the following information for items.

Field	Description	Required
Description	Should be meaningful and allow easy identification of item	Yes
Keycode	Unique number to identify product by	Yes
Prod Code	Enter supplier product number or barcode	No
Size	Item size up to 3 characters long.	No
Colour	Colour of item	No
Pack Size	If items must be ordered in lots, eg box 50 certificates then enter lot size	No
Supplier	Must be entered, for one of orders use Unidentified Supplier to save registering all suppliers details in system	Yes
Stock	This is the amount of stock that is believed to be held at any given time. (Can not be altered in this screen use Count/Update stock screen to adjust)	
On Order	Number of units currently on order for item.	
Reorder at	This is the quantity at which stock will be ordered if the Generate order option is used. Enter here the minimum level	No

	of stock you wish to have before re-ordering.	
Order to	This is the quantity that order will bring total stock on hand up to.	No
Cost	Cost to purchase goods.	Yes
Sell	Price goods are sold for.	Yes
Allow Orders	If this box is not checked then item cannot be ordered. Useful if goods are still in stock but no longer orderable.	Yes
Allow Sales	If this box is not checked then item cannot be sold. If goods are on order but not yet in stock use this to remove them from sale items list	Yes
Picture	If you wish to enter picture to aid in identifying items you can.	No

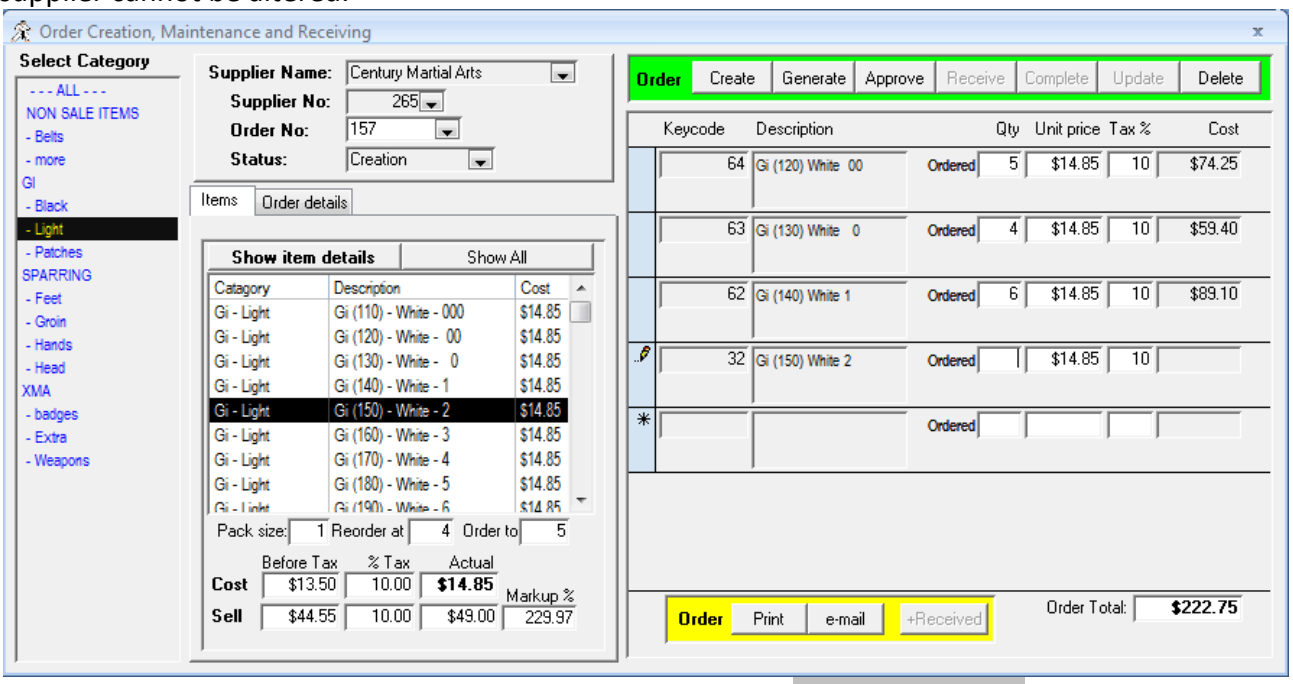
Orders

FUNCTION: Manage orders from creation through receiving.

USE: In order to enter stock you create and receive it against orders.

Order Creation

Click Create to start a new order. You must then select a supplier. Once you select a supplier you may start selecting the items for the order. Once you have selected the first item on the order the supplier cannot be altered.



Continue selecting items, either from the list or you can click Show item details and select items by entering their details or selecting from drop down lists. As you select items you can enter the units required and alter the unit cost if required. To permanently alter the unit cost or sell prices they may be entered below the item details. To alter the cost for this order only change cost next to quantity being ordered.

NOTE: when you create an order in the item list only items for that supplier are listed. If you wish to order items other than these click Show All and all items will be displayed. We recommend

however if you are going to continue to order an item from a supplier you change them to the supplier in the item screen. This will make it easier to locate items when ordering.

Order Generation

As an alternative to manually adding items to an order you may set up the "reorder at" and "order to" quantities for items. Then when you wish to create an order you simply click Generate and all the required items for that supplier will be added with the required quantities. Re-order at and Order to quantities can also be altered on this screen if required. Once you auto generate an order you can then manually update it as required.

Example

If an order was auto generated for an item with the following details:

Re-Order at = 12 Order to = 18 Stock = 10 Stock on order = 0

As the Current Stock + Stock on Order is less than the Re-order at value this item will be added to the order. The following quantity would be ordered.

Ordered Quantity = Order to - (Stock + Stock on order)

= 18 – (10 + 0) = 8

Approve Order

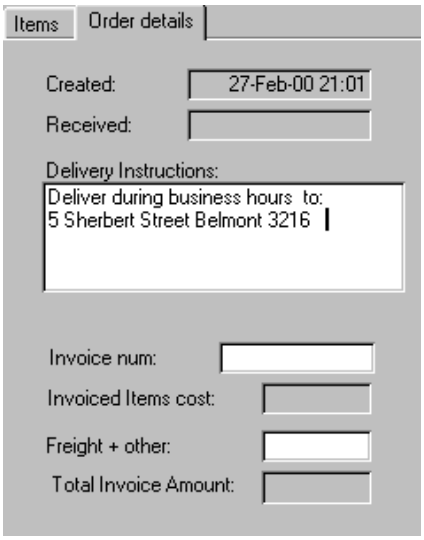
Once all the items are on the order clicking approve order will lock all the details of the order. The status of the order status is altered to approved and the stock in the order is now recorded as on order. These details can be altered if required by clicking Update. Delivery instructions should also be entered at this time on the "Order details" page.

Receive Order

Clicking Receive changes the status to receiving. Details of what was received can now be entered. If you need to add items click Update to allow this.

Update Order

Clicking Update changes the Status to Update and the order can be altered as in creation stage. If the quantity being received is different to that ordered this is not really required. If however an item is being received that was not on the original order then it may be, or if the order needs to be altered so it can be resent.



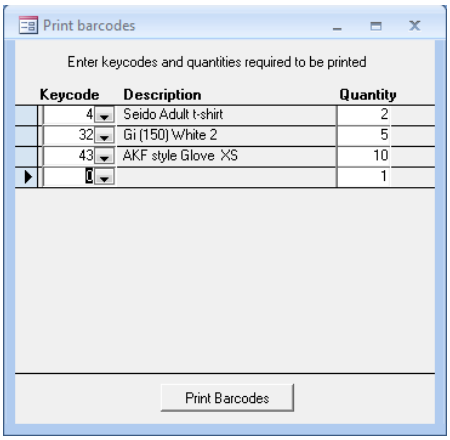
Print Barcodes

FUNCTION: Produce barcodes for stock.

USE: If you wish to use a scanner when selling stock then produce barcodes to scan with this function.

Keycode: First select the code for the item you wish to produce barcodes for.

Description: this will automatically be displayed when you enter a keycode.
Quantity: enter the number of labels you wish to print.
Standard Barcodes: Select this option to create a formatted report of Barcodes (As shown Below).
Custom Layout: Select this to transfer data to a separate database for formatting.



Sales detail

FUNCTION: Reports on sales at an item detail level.

USE: Use to check records of receipts and for general enquiries.

This report provides details of individual sales. You can specify any period you wish to report on. By default report is sorted by keycode within category and sub category.

Sales report

Seido Juku Karate Geelong

Gi

Cotton

103 - Gi Pol/Cot White 1

Date - time	Member	Markdown	Qty	Amount
18:23 30-Mar-00	32 Richard Scotty		1	$36.00

104 - Gi Pol/Cot White 2

Date - time	Member	Markdown	Qty	Amount
18:22 30-Mar-00	33 Belinda Sander		1	$36.00
18:17 31-Mar-00	21 Sharon Bags		1	$36.00

Report can be sorted by date and time however if required.

Sales report

Seido Juku Karate Geelong

Date - time	Keycode	Member	Markdown	Qty	Amount
18:13 02-Mar-00	106 - Gi Pol/Cot White 4	25 - Carmen Royals		1	$36.00
17:27 09-Mar-00	108 - Gi Pol/Cot White 6	36 - Brandon Oven		1	$36.00
17:29 09-Mar-00	113 - Patch Kanji	16 - Noelle Wills		1	$6.00
17:29 09-Mar-00	114 - Patch Arm	16 - Noelle Wills		1	$6.00

These reports enable the tracking of sales for a period to occur quite easily. The reports can also be limited to a specific keycode.

Sales detail

FUNCTION: Provides a summary of sales by item.

USE: Check sales for a specific period.

Sales Summary

Seido Karate - Grovedale

Gi

Sub Cat.	Keycode	Description	Mark Qty	Total Downs	Average Sales	Sale Amt	% Cost profit
Cotton							
119	Gi - 10 oz (150) - White - 2	1	$0	$67	$67.00	$24.00	179%
33	Gi (160) - White - 3	3	$0	$147	$49.00	$41.25	256%
	Sub Cat Total:	4	$0	$214	$53.50	$65.25	228%
Patches							
1	Kanji patch	2	$0	$20	$10.00	$15.00	33%
	Sub Cat Total:	2	$0	$20	$10.00	$15.00	33%
	Category Total:	6	$0	$234			192%
	Report Total:	6	$0	$234			

Stock On Hand

FUNCTION: Reports by item the current stock on hand SOH and Stock on Order SOO.

USE: Use to check if you need to order more stock for any items.

Report can be limited as follows:

- Supplier, you can report for all suppliers or select a supplier.
- Item Status, you may limit to only items available for order, or those not for order.
- You may also limit it to a Specific Category or Sub-Category

Stock Report

Seido Juku Karate Geelong

Class=Gi

Class	Keycode	Description	Cost	Sell	SOH	SOO
Gi						
Cotton	103	Gi Pol/Cot White 1	$19.00	$36.00	2	2
	104	Gi Pol/Cot White 2	$19.00	$36.00	5	
	105	Gi Pol/Cot White 3	$19.00	$36.00	2	3
	106	Gi Pol/Cot White 4	$19.00	$36.00	1	2
	107	Gi Pol/Cot White 5	$19.00	$36.00	4	2
	108	Gi Pol/Cot White 6	$19.00	$36.00	1	1
Patches	114	Patch Arm	$5.00	$6.00	4	
	113	Patch Kanji	$5.00	$6.00	5	
Stock Value	***Stock on hand at cost***	*$330.00*	***Stock on order at cost***	*$190.00*		
	Stock on hand at sell	*$594.00*	***Stock on order at sell***	*$360.00*		

The report lists all items meeting the entered criteria, their cost price, sell price and SOH, SOO quantities. At the bottom of the report is listed the SOH and SOO values of stock at both cost and sell.

Sales Analysis

FUNCTION: This report provides an analysis of sales, showing profits and markdowns.

USE: Examine the profit and trends in your sales over a 4-month period, in this way you should be able to see the impact of any special sales you run.

Sales Analysis Report

Seido Juku Karate Geelong

Keycode Description	Cost	Sell	Stock on Hand	Order	Sales prior 3 months Jan	Feb	Mar	April Sales	Mark downs	Profit	4 month period totals Sales	Mark downs	Profit
Major Classification Gi													
Classification Cotton													
103 Gi Pol/Cot White 1	$19.00	$36.00	-3		2	3	3				8		
			-$57		$60	$108	$108				$276	$12	**$124**
104 Gi Pol/Cot White 2	$19.00	$36.00	-5		4	2	5	1			12		
			-$95		$144	$72	$180	$36		**$17**	$432		**$204**
105 Gi Pol/Cot White 3	$19.00	$36.00	-2		2	1	2	3			8		
			-$38		$72	$36	$72	$108		**$51**	$288		**$136**
106 Gi Pol/Cot White 4	$19.00	$36.00	-8		3	7	4	2			16		
			-$152		$108	$210	$144	$72		**$34**	$534	$42	**$230**
107 Gi Pol/Cot White 5	$19.00	$36.00	-5		3	4	2	6			15		
			-$95		$96	$138	$72	$207	$9	**$93**	$513	$27	**$228**
108 Gi Pol/Cot White 6	$19.00	$36.00	-3		1	2	2	1			6		
			-$57		$36	$72	$72	$36		**$17**	$216		**$102**
Summary for Class= Cotton (6 items)			*-26*		*15*	*19*	*18*	*13*			*65*		
			-$494		*$516*	*$636*	*$648*	*$459*	*$9*	***$212***	*$2,259*	*$81*	***$1,024***
Summary for Major class = Gi (6 items)			***-26***		***15***	***19***	***18***	***13***			***65***		
			-$494		***$516***	***$636***	***$648***	***$459***	***$9***	***$212***	***$2,259***	***$81***	***$1,024***

You may request either a detailed report as shown below or a summary report only listing summaries from sub-category down. You may also limit report to a category of sub-category.
REPORT PERIOD: The report covers a four-month period. The month being reported has a breakdown of the number of items sold, the value of Markdowns taken. The previous 3 months only the sales data. Then there is a summary of the data over the full 4-month period.

STOCK ON HAND: This details the number of units on hand and their value at sell.

STOCK ON ORDER: Shows number of units and value at sell for Stock on order.

SALES PRIOR 3 MONTHS: Shows the number of items sold and the total value of these sales.

SALES: Shows the number of items sold and the total value of these sales.

MARKDOWNS: This is the dollar value of markdowns on the items sold. This represents the difference between the current sell price and the actual sale price. If the sell price of an item is increased then items already sold at the old price will now appear with a markdown amount.

PROFIT: the profit amount is the difference between the cost price and the sale price. If the cost price of an item is altered then the profit for items purchased at the old price will be affected.

This report provides a quick way of determining how much revenue is being gained from the sale of goods. You should note that it provides a way of determining the result of specials, where you can quickly determine the revenue raised and compare it to previous months.

You can compare sales profits to past months profits if you keep copies of this report. Due to the effect on Profits and Markdowns of altering the cost or sell price of an item it is not recommended that you use this report for financial purposes.

Stock Coverage

FUNCTION: Provides an indication of the coverage provided by the current stock levels.

USE: When deciding if you need to order stock, and how much, look at this report to determine how long your current stock will last if sales remain at current rate.

Stock Coverage report (4weeks)

Seido Juku Karate Geelong

Keycode	Description	Cost	Sell	Sales by month Jan	Feb	Mar	Apr	Average Sales /week	Stock on Hand	Order	Weeks Cover	Requ. Stock	Re-order At	To	Optimum Stock leve
Gi															
Cotton															
103	Gi Pol/Cot White 1	$19.00	$36.00	2	3	3		.50	3		6.00			1 ^	**2**
104	Gi Pol/Cot White 2	$19.00	$36.00	4	2	5	1	.75	2		2.67 ^	**1**	2	3	**3**
105	Gi Pol/Cot White 3	$19.00	$36.00	2	1	2	3	.50	4		8.00		2	3 *	2
106	Gi Pol/Cot White 4	$19.00	$36.00	3	7	4	2	1.00	5		5.00		3	4	4
107	Gi Pol/Cot White 5	$19.00	$36.00	3	4	2	6	.94	3		3.20 ^	**1**	3	4	**4**
108	Gi Pol/Cot White 6	$19.00	$36.00	1	2	2	1	.38	1		2.67 ^	**1**		1 ^	**2**

The initial details shown are the cost and sell price, then a breakdown of the number of units sold for the previous 4 months. This is followed by the Average weekly sales. The average weekly sales being calculated with the use of the first sale date recorded.

The stock on hand and on order is then shown along with the number of week's coverage this provides. Where the weeks coverage is less than that required a "^" is shown next to the weeks coverage and the required stock listed. The number of units required to provide the coverage in weeks requested is shown for those items that are short stock only.

Finally the Re-order at quantity is shown along with the Re-order to quantity. If the reorder to quantity is too high according to the calculations then it is followed by a "*". If it is too low by a "^". Finally the optimum stock level required to provide the entered number of weeks coverage is shown.

Completed Orders

FUNCTION: Reports orders that have been completed for period.

USE: Use to determine outgoings due to purchases.

Completed Orders

Seido Juku Karate Geelong

Order	Supplier	Created	Received	Invoice	Freight	Invoiced
000003	3 - Kyoshi	29-Feb-00	29-Feb-00	11	$0.00	$100.00
000002	2 - Imperial Martial Arts Supplies	27-Feb-00	29-Mar-00	nil	$17.00	$326.00
000005	4 - Tans	10-Mar-00	14-Apr-00	67	$8.00	$90.00
				Total	*$25.00*	*$516.00*
				Total Invoiced + Freight		*$541.00*

Stock Purchased

FUNCTION: This report gives a breakdown of the purchases for a specified period by item.

USE: Check total purchases for a period, may be used in conjunction with Stock on hand reports or sales summary to check for over purchases.

Stock Purchased

01-Dec-09 to 30-Jan-10

Seido Karate - Grovedale

Order: 000103 **Supplier:** 158 - KMA Supplies Created: 15-Jun-09 Received: 22-Dec-09

Item Code	Description	Quantity	Purchase Cost	Mark Up	Retail Value
186	MMA gloves	20	$590.04	53%	$900.00
			$590.04	53%	$900.00

Order: 000104 **Supplier:** 158 - KMA Supplies Created: 11-Jan-10 Received: 11-Jan-10

Item Code	Description	Quantity	Purchase Cost	Mark Up	Retail Value
137	Hakama - M	3	$126.00	64%	$207.00
157	Hakama - L	2	$84.00	50%	$125.98
111	Brown Belt White Stripe - 4	10	$26.00	151%	$65.20
			$236.00	69%	$398.18
	Total		$826.04	57%	$1,298.18

Count / Update stock

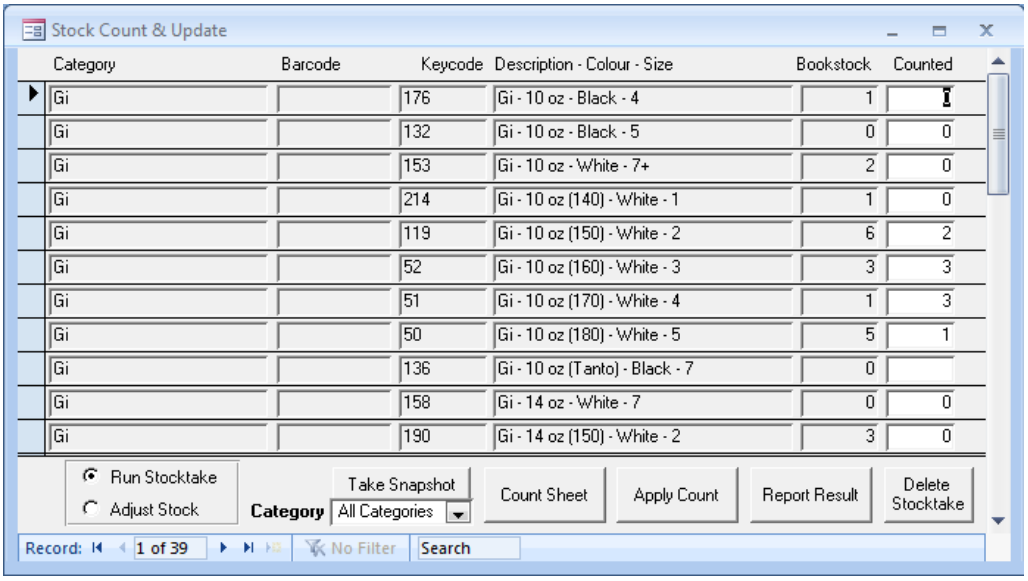
FUNCTION: This screen is used to update the Stock on hand for items.

USE: Run a stocktake to determine your true stock levels and enter them here, or just adjust stock levels as you find discrepancies.

Adjust Stock

Select the "Adjust Stock option.
You can now enter the number of units in the counted column. The SOH quantity for the item is updated as soon as the value is entered. The only way to track these adjustments is by using the Stock on Hand Updates report. This report will include any updates made on this screen as an "Adjustment".

Running Stocktake.



Make sure the "Run Stocktake" option is selected.
Above the screen is shown operating in stocktake mode. To perform a stocktake the following steps should be followed.

1. Click delete stocktake to remove any past stocktake records.
2. Select the categories you wish to count (All Categories if all) and then click Take Snapshot. This creates stocktake records for each item. The current Stock on Hand value is recorded as the book stock (current stock level in the system).
3. Use the Count Sheet option to print out a list of items to count. This report is an optional part of the process, items can be entered directly as counted.
4. Count number of each item and enter quantities in the counted column.
5. When all items are counted then click Apply Count. Note: if you did not count an item, and just leave a "0" in counted the Stock on Hand for this item will be set to 0.
6. Click Report Results to obtain your stocktake result. Stocktake report is detailed below.

Stocktake report

Stocktake Report

Seido Karate - Grovedale

Major Cat	Category	Description	Keycode	Cost	Book stock	Count	Stock Value	Shrinkage Profit/Loss
Gi	Cotton	Gi - 10 oz (140) - White - 1	214	$24.00	1	1	$24.00	$0.00
		Gi - 10 oz (150) - White - 2	119	$24.00	3	3	$72.00	$0.00
		Gi - 10 oz (160) - White - 3	52	$24.00	1	0	$0.00	-$24.00
		Gi - 10 oz (170) - White - 4	51	$24.00	-2	0	$0.00	$48.00
		Gi - 10 oz (180) - White - 5	50	$24.00	4	3	$72.00	-$24.00
		Gi (160) - White - 3	33	$13.75		2	$27.50	$27.50
		Gi (170) - White - 4	34	$13.75	15	12	$165.00	-$41.25
		Gi (180) - White - 5	35	$13.75	13	12	$165.00	-$13.75
		Gi (190) - White - 6	36	$13.75	4	4	$55.00	$0.00
		Gi (200) - White - 7	37	$13.75	1	1	$13.75	$0.00
	Summary for Category = Cotton (10 items)						*$594.25*	*-$27.50*
Gi	Patches	Kanji patch	1	$7.50	71	71	$532.50	$0.00
		Plum blossom patch	2	$7.50	72	72	$540.00	$0.00
		Weapons patches	169	$1.00	35	35	$35.00	$0.00
		XMA patch	130	$2.50	13	12	$29.96	-$2.50
	Summary for Category = Patches (4 items)						*$1,137.46*	*-$2.50*
Summary for Major Category = Gi (14 Items)							***$1,731.71***	***-$30.00***
				GRAND TOTALS			*$1,732*	*-$30*

The items in the Stocktake are listed in Major Category, Category and then Description sequence. Summaries of the results are provided at Category, Major Category and report levels. Any items that had zero Stock on hand prior to stocktake and zero counted will not be reported.

All figures relate to stock value at **Cost**.
Bookstock: The quantity in Stock on hand when snapshot was taken.
Count: Number of items counted.
Stock Value: Value of Stock counted.
Shrinkage Profit/Loss: this is the value of the adjustment to stock performed. So if there was an item with Bookstock 0 and 1 was counted the result is a profit, the value of the one unit. If a loss occurs this will be highlighted in red. This can happen because stock was sold and not recorded, stolen, received incorrectly or for any other number of reasons.
GRAND TOTALS: You will notice for this stocktake $1732 worth of stock was counted and the net result was a loss or shrinkage of $30.

Stock On Hand Updates

FUNCTION: Reports any updates that have occurred to Stock On Hand.

USE: Use to confirm what transactions have been processed for an item, particularly useful if the SOH appears to be incorrect, to look for where it has gone wrong.

Stock On Hand updates report

Seido Karate - Grovedale

Report from 01-Jan-09 to 01-Feb-10

Keycode	Description	Orderable	SOH	SOO	Date time	Adjustment	Type
39	Head Guard M\L	yes	1	0			
					11-Feb-09 20:24	1	Order
					23-Feb-09 16:40	3	Order
					9-Apr-09 18:34	-1	Sale
					24-Aug-09 18:20	-1	Sale
					31-Aug-09 19:13	-1	Sale
					14-Oct-09 17:41	-1	Sale
					17-Dec-09 17:19	2	Order
					13-Jan-10 16:49	-1	Sale
					19-Jan-10 17:10	-1	Sale
					23-Jan-10 10:44	-1	Stocktake
					Total for 10 adjustments to keycode=39	***-1***	
					Total adjustments	***-1***	

The report lists transaction by transaction how the SOH figure for each item reported has been updated. If the report is run for a period of time starting from the items creation to the present time then the total updates should match exactly to the SOH value.

Past Stocktakes

FUNCTION: Examine past stocktakes.

USE: In the stocktake screen you can only examine and report on the current stocktake. This screen gives you access to previously completed stock takes.

Report is identical to the stocktakes report.

Suppliers

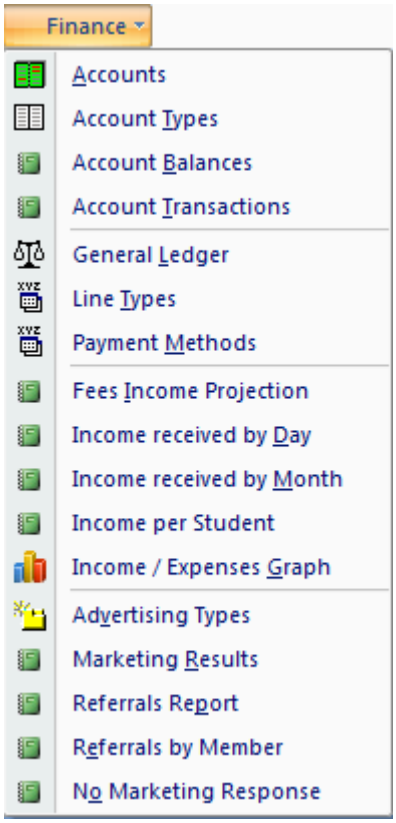
FUNCTION: Create and maintain supplier list.

USE: When creating orders they are done for a particular supplier, items are associated with a supplier when they are created.

You may if entering this screen directly enter the name or number of the supplier at the top of the screen to locate an existing supplier.

There is a special supplier, supplier 1 – Unidentified Supplier. This supplier should be used for once off purchases where you do not wish to record all the suppliers' details but wish to order stock, or receipt stock into the system.

To add suppliers simply click Add Supplier and enter details. To remove select supplier, then click Delete Supplier.



Finance menu

Member accounts can be used to track money owed by members (unpaid fees and sales) or for money being credited to members, payment for taking class or scholarship fund that members fees and charges may be drawn against.

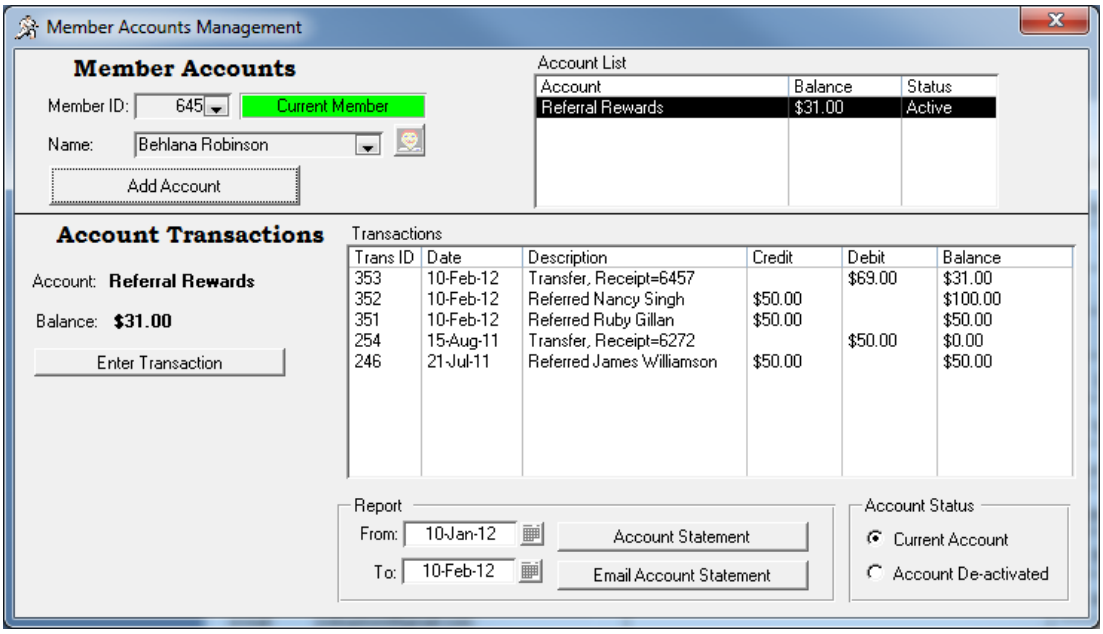
The General ledger is used to record expenses and any income items not recorded elsewhere. This enables Club Administrator to be used to record all financials.

Advertising & Marketing results monitoring enables you to determine where your members are coming from and how much these different sources are costing you.

Accounts

FUNCTION: Allows creation of accounts and entry of account transactions.

USE: Create member accounts and enter transactions directly to accounts.



Accounts overview

Accounts are used to track a financial value that is either owed by the account holder or owed to the account holder. Amounts are credited to and from accounts either directly through this screen (as explained later), or when an amount is transferred from the account when making a

transaction such as paying fees or purchasing goods. When it is a transfer for a purchase or fees you will see an entry "Transfer, Receipt=<Receipt number>" otherwise you will see a description entered at the time of creating the transaction. You can set up as many account types as you want but there are several account types that are used for special purposes.

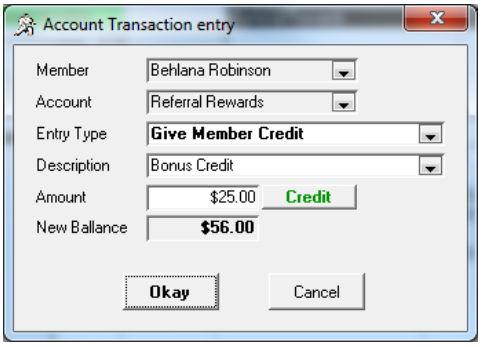
- Invoice – when you change a receipt type to invoice this account type is used, if the member does not have an invoice account one will automatically be created.
- Referral Rewards – When using the marketing screens and you record a referral reward amount it's credited to this account type for the member.
-

To enter transactions for an account bring up the member and select the account that transaction is to be applied against.

Then press "Enter Transaction". The Account Transaction entry form will display for you to enter the details of the transaction.

Into the **Description** you can put any meaningful description.
The **Amount** entered should be positive if an amount is being credited to an account or negative if the amount is being deducted from the account.

There are 4 **Entry types** these are these are detailed below:



Account Payment:

This transaction type is used for payments that are being made to accounts. There is money involved in these transactions so there will be a receipt created. Examples of the types of transaction that this applies to are: Payment by member of outstanding account balance. They may have purchased goods previously and charged them to the account, and are now making payment of this amount.

Account Payment - Refund:

This transaction type is used where a payment is being made to the member. For example a member has referred a number of members and you are giving them this credit in cash.

Give member credit:

This transaction type is used where you wish to make credit available to a member to use, this could be for referring members or providing some sort of service. As this is not an actual payment there is no receipt created.

Remove member credit (debit):

This transaction type is used to reduce the credit available to a member. This could be used if a member had credit incorrectly applied to them or to reduce their account back to 0 if they left with credit still owing them.

Account Report

Josh Boden
88 Suffolk St
Grovedale Vic 3216

Seido Karate - Grovedale

Member ID: 792

Account: Incentive

Opening Balance: **$0.00**
Closing Balance: **$21.00**

Date	Transaction detail	Debit	Credit	Balance
13-Jan-10	193 Account Direct entry - Referral Credit	$0.00	$70.00	$70.00
13-Jan-10	194 Transfer from Account - Transfer, Receipt=5115	-$49.00	$0.00	$21.00

Opening balance	-	Total debits	+	Total Credits	=	Closing Balance
$0.00		-$49.00		$70.00		$21.00

Pressing the Account Report button will display a report of all account transactions for the entered period. The example above shows a $70 referral credit that has been given to a member, $49 of this has been used and $21 remains.

Note: Accounts maintain an ongoing account balance that is updated for each transaction if the balance of transactions does not equal transaction total an error message will be displayed. Under normal processing this will not occur.

Account Types

FUNCTION: Set up account types for use in creating accounts.

USE: Account types let you track the usage and amounts that are used for different purposes.

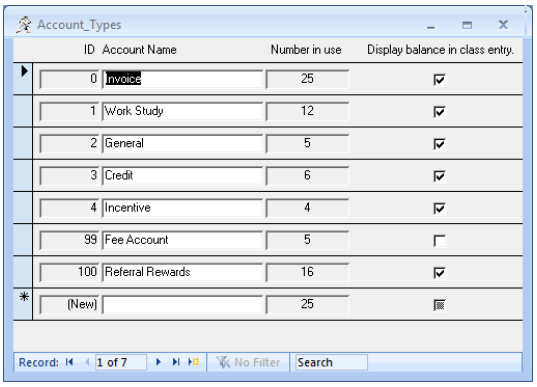
Set up as many account types, as you require. Examples:

Work Study: Make payments to instructors by giving them credit to use for fee payments, seminars or stock.

Scholarship: Award scholarship amounts to members and track with accounts.

Note the Invoice, Fee Account and Referral Rewards accounts are special account types that can not be removed.

If you wish to display the balance from accounts in the class entry screen check this check box.



Account Balances

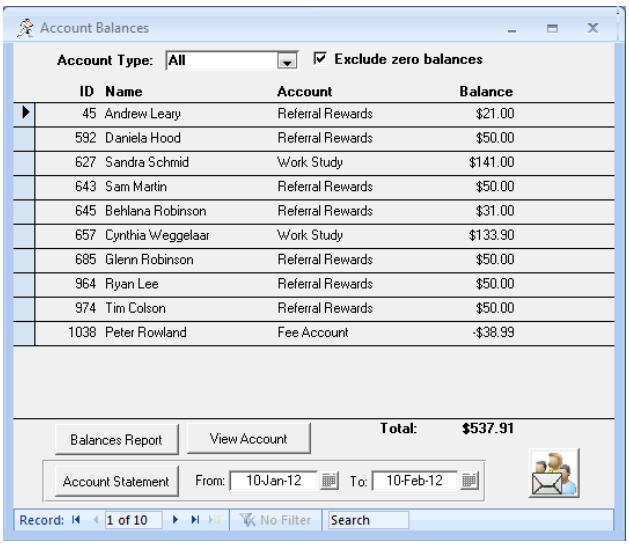
FUNCTION: Shows individual account balances and total.

USE: Check out standing or owed amount for accounts and total to be covered.

To limit to a single account type and see total for that account type enter required account type.

Account report can be generated from here. See Accounts for more details Account report.

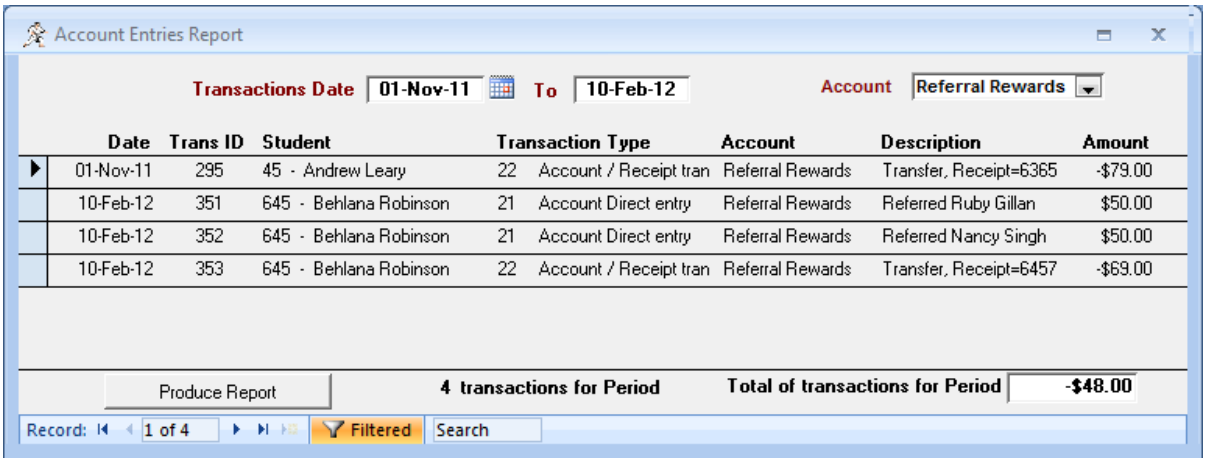
You can also use the group message button to send a message to all those listed.



Account Transactions

FUNCTION: Shows individual transactions received for accounts in order received.

USE: Check total amount received / paid to accounts for a period.



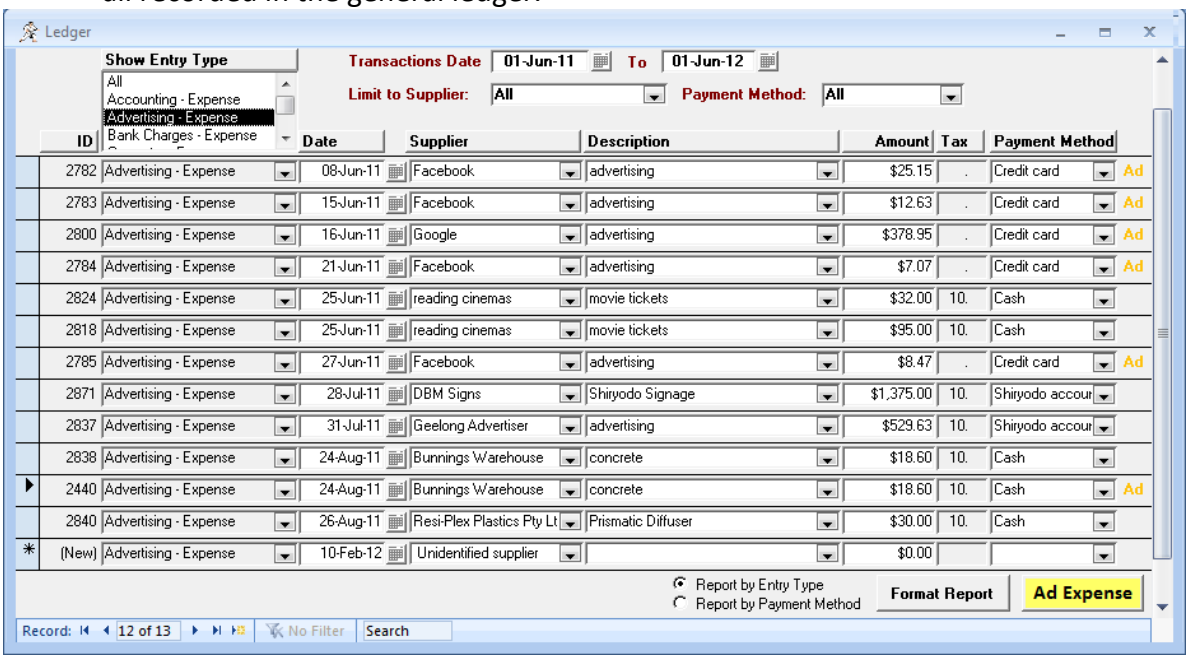
Account transactions for period entered will be displayed in order entered. The transaction type will indicate if the transaction was a direct entry, or an actual payment. In the description will be displayed the description entered when payment was made or the receipt it was transferred as a result of.

General Ledger

FUNCTION: Record income and expenses other than those recorded in other areas of club administrator.

USE: To enable a complete profit and loss to be generated for the business expenses other than orders need to be recorded (utilities for example), there may also be other

income items that have not been captured by fee payments of stock sales. These are all recorded in the general ledger.

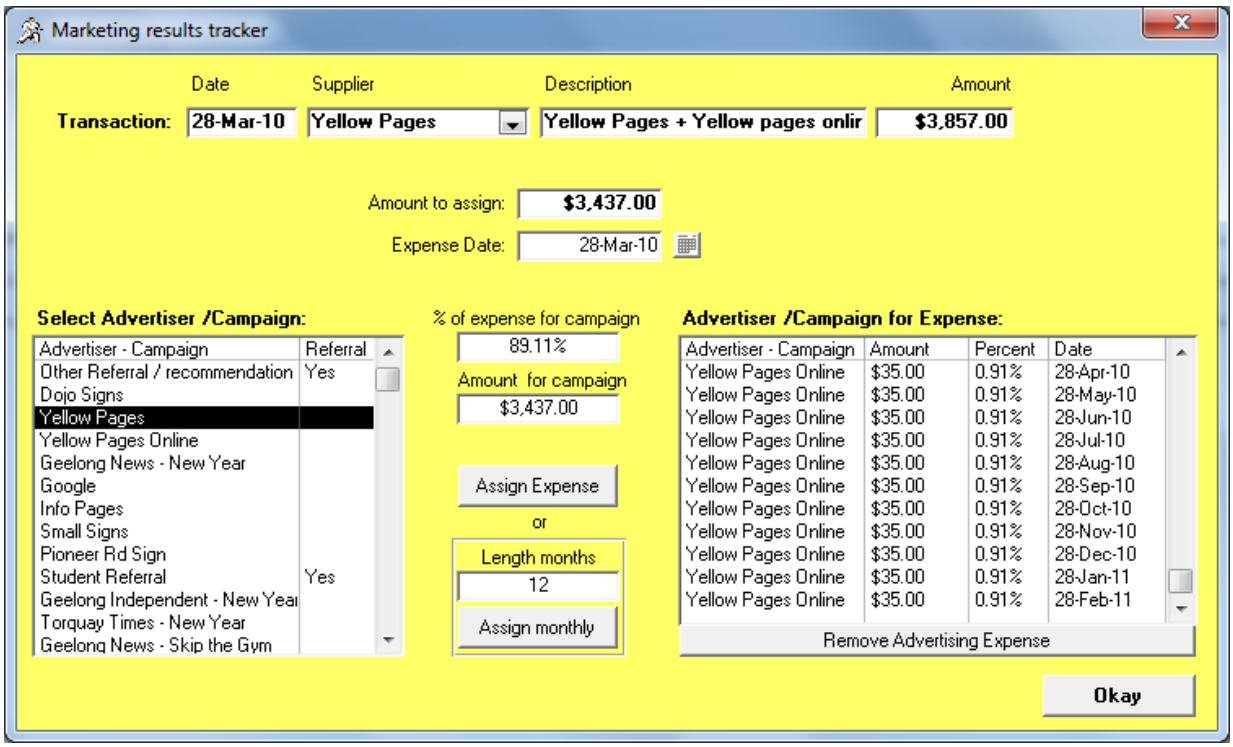


Entries in the general ledger have an entry type to allow summary of similar items for reporting. A transaction date, supplier description and amount. If the entries being made relate to advertising or marketing expenses then use the 'Ad Expense' button to flag these after they have been added. Items that have been flagged in this way will have a gold 'Ad' beside them. There is also a payment method to allow balancing of payments against accounts credit cards etc.

Marketing results tracker.

FUNCTION: Link expenses to marketing and advertising campaigns.

USE: The critical figures in an advertising campaign aimed at generating members are the cost per lead and cost per member. This screen enables you to associate expenses to campaigns so that this can be calculated.



This screen can not be entered directly but is entered via the 'Finances – General Ledger' screen. When an expense record is selected and the 'Ad Expenses' button clicked this screen opens the details of the expense will be shown at the top of the screen. The expense date will initially be set to the transaction date of the record in the General Ledger. It may be that this date is prior to the start of the campaign or after the campaign. To ensure this expense is reported you should set this date to one during the campaign. If the whole expense is to be attributed to a single add campaign simply select the campaign from the list of active campaigns and click Assign Expense.

If the expense spans financial or calendar years or runs for a number of months and you wish to be able to accurately report on campaigns across various periods you can split the expense by month across the length of the Campaign. This way whatever periods you choose to report on you will get a reasonably accurate picture of the expenses for that period. This is particularly useful with yearly types of advertising. Because how you assign this expense has no impact on your financial results you can use what ever dates are appropriate regardless of when the expense was actually paid.

Similarly if the expense relates to a number of campaigns you can split it either by entering the dollar amount or the percentage to be applied. In the example above the expense needs to be divided between two campaigns, Yellow pages and Yellow pages online and then spread across 12 months for each.

Line Types

FUNCTION: Define lines to record income and expenses against in general ledger.

USE: The general ledger records income and expenses the summary of this information is defined by the lines set up in Line Types.

Each line will be identified in the General ledger by it's description. These lines can then be further summarised to summary lines. The line types required and the summary lines required will normally be determined by accounting and tax requirements of the individual business.

Ledger Entry Line Types

Summary Line	Expense	Description	Tax
Non-Capital	Expense	Phone	10.
Martial	Expense	Training Equip	10.
Purchases	Expense	training supply costs	10.
Depreciate	Expense	Depreciate	10.
Apportion	Expense	Shared Expenses	10.
Martial	Expense	Training	10.
Banking	Expense	Bank Charges	10.
Non-Capital	Expense	Accounting	10.
Employee	Expense	Wages	.
Banking	Expense	Loan Interest	.
Donations	Expense	Donations	10.
Software	Income	Full Contact Software	10.
Employee	Income	Training Incentives	.
*			10.

Record: 1 of 24 No Filter Search

Payment Methods

FUNCTION: Define payment methods to be available in the General Ledger Screen.

USE: The general ledger records income and expenses the payment methods enable these to be balanced against your accounts / credit cards for accounting purposes.

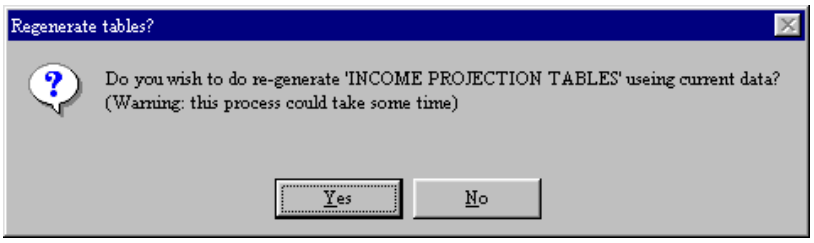
Fees Income Projection

FUNCTION: Calculates fees falling due in the future to provide and estimated income.

USE: Use this report as a guide to the fees you can expect to receive.

This report calculates the income you will receive from Annual Fees, Training Fees and Contracts if all current members continue and fees stay at current level for the next 7 months; it also displays the amounts still outstanding from the past 3 months. This provides a quick snap shot of your expected income for coming months.

When initially selected the following will be displayed.



If you select yes then the contracts

coming up for renewal and the fees falling due will be recalculated. This may take several minutes however.

You will notice that the report always displays January first and December last regardless of the month you are in. So you will need to keep in mind which months are in the future and which in the past. There will always be a blank month after the last future month.

The report includes:

- All annual fees falling Due.
- All training fees falling due.
- Any Grading Fees due for scheduled gradings.
- All contract fees falling due.
- Extra payments based on current contracts being renewed.

If any fees are overdue these will also be included. For this reason where there are members who are no longer training or making payments they should be de-activated so that the Fees they would have been paying are not included in the figures.

Income Received Report by (Day / Month)

FUNCTION: Provides a summary report of payments received broken down by type.

USE: Provides reporting of income for a period, this can be used for end of year reporting and calculating of profit and loss.

This report will detail the amount received/paid for the selected types of transactions. When you select this report you have the option of reporting at Category level (amount is broken down into categories within each month), month level (report summarises transaction types by month), or at transaction level.

You should select the transaction types you wish to include or exclude.

Sample report layout:

Type	*Period*	*Category*	*Amount*
Fees	Mar-2000	Grading Fee	$180.00
	Session training Fee		$20.00
	Training Fee	$1,025.00	
	Apr-2000	Grading Fee	$160.00
	Training Fee	$1,225.00	
Total for type = Fees	*$2,610.00*		
Purchase	Mar-2000	Non Sale items	-$79.00
	Gi	-$247.00	
Total for type = Purchase			*-$326.00*
Sale	Mar-2000	Gi	$380.00
	Sparring Gear	$40.00	
	Apr-2000	Gi	$224.00
Total for type = Sale	*$644.00*		
	Total for report		***$2,928.00***

Income / Expenses Graph

FUNCTION: Provides a graph of income and / or expenses by month, quarter or year.

USE: Provides clear graphical representation of the income and expenses of the business.

This graph is a great way to see how the business is progressing and makes it easy to see trends as well as what factors are contributing to them. The information provided by this graph is similar to that provided in the Income received by month report. In fact this is really a graphical report of the same data.

Income Received Report by (Day / Month)

FUNCTION: Provides a summary report of payments received broken down by type.

USE: Provides reporting of income for a period, this can be used for end of year reporting and calculating of profit and loss.

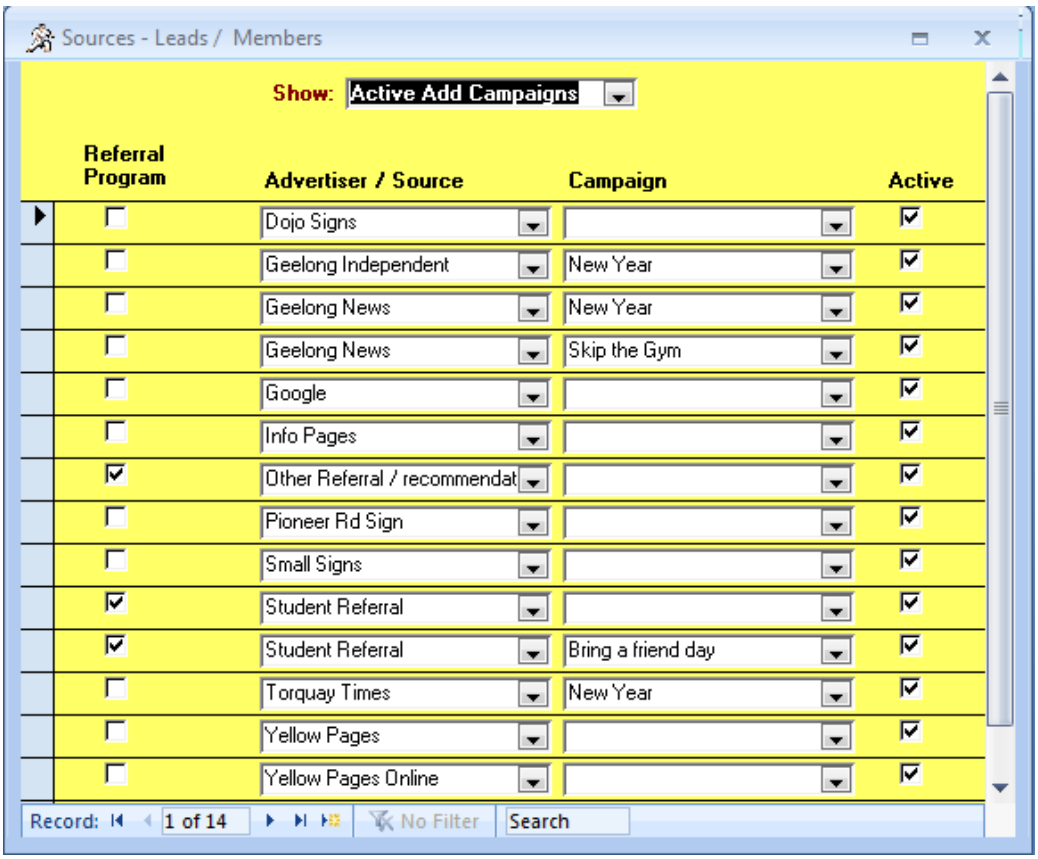
This report will detail the amount received/paid for the selected types of transactions. When you select this report you have the option of reporting at Category level (amount is broken down into

Advertising Types

FUNCTION: Set up your advertisers and advertising campaigns.

USE: The advertising sources set up in this screen will have leads, members and expenses assigned to them to give an advertising result.

To be able to advertise effectively you must track your results. The first step in this is setting up your advertisers and campaigns.



You can see for some Advertisers there are more than one campaign and for some campaigns there are more than one advertiser. A campaign is a specific advertising drive, it may use one or more advertisers, often this will simply be running the same advert or offer in multiple sources. But by recording this separately it enables you to not only judge how effective each advertising method it but also how effective each campaign is. This may include in club promotions such as bring a friend day where you can track these separate to the other member referrals you may receive, and then still be able to get overall figures for member referrals. This data will accumulate over time and you will be able to compare past years campaigns to current.

Marketing Results

FUNCTION: Reports results for advertisers and advertising campaigns.

USE: Provides the information required to determine how effective your various forms of advertising are.

Below is shown the marketing results for two advertisers.

Marketing Results Report

29-Dec-09 to 08-Apr-10

Monday, 29 March 2010

Seido Karate - Grovedale

Advertiser	Campaign	Source Listed	Leads	Students	Sign up Rate	Referral Rewards	Rewards Total	Payments received	Stock Costs	Campaign Expenses	Campaign Actual Cost	Cost Per Lead	Cost Per Student
Student Referral		6	6.	5.	83%	3	$150	$96	$69		$123	$20	$25
Yellow Pages		10	9.5	7.5	79%	0	$0	$95	$119	$573	$597	$63	$80

This shows that Member Referral was the source on 6 occasions and Yellow Pages on 10. There is however only 9.5 leads attributed to Yellow Pages; this would indicate that one of the leads gave 2

lead sources so only .5 was attributed to Yellow Pages. 7.5 members indicate 2 did not convert to members. This gives a 79% signup rate for the Yellow Pages.

There where 3 referral rewards issued ($50 sign up reward for referring members). The payments received relate to the cost of introductory lessons or other payments. The Stock costs relate to stock sold or free uniforms given out.

All these expenses and the income amounts give us the total cost associated with a lead source. Dividing this by the number of leads gives a cost per lead or dividing by the number of members gives a cost per member. So in the example above Member Referrals cost $25 per Member and Yellow Pages $80.

Referrals Report

FUNCTION: Reports referrals for sources and campaigns.

USE: Enables checking of who is referring members.

This report can be used to look at in detail where referrals are coming from, this additional level of information is not relevant to other lead sources.

Referral report
01-Jan-10 to 07-Apr-10

Monday, 29 March 2010
Seido Karate - Grovedale

Source	Campaign	Date	Lead / Member	Referred by	Referral Reward
Member Referral					
		03-Mar-10	850 - Denise Wilkin	305 - Michele Denham	$50.00
		04-Mar-10	852 - Elizabeth Anders	841 - James Erlenbusch	$50.00
		04-Mar-10	854 - Oliver Roberts	853 - Julie Milley	$50.00

Referrals By Member Report

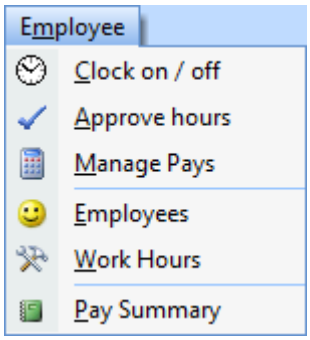
FUNCTION: Reports referrals by members.

USE: Shows how many referrals you are getting from each member. If you are running a referral reward program where there are incentives for giving multiple referrals or the most referrals this enables easy checking of referral numbers.

No Marketing Response

FUNCTION: Reports members with no source entered.

USE: This report can be used to identify where marketing information is missed and so it can be follow up.



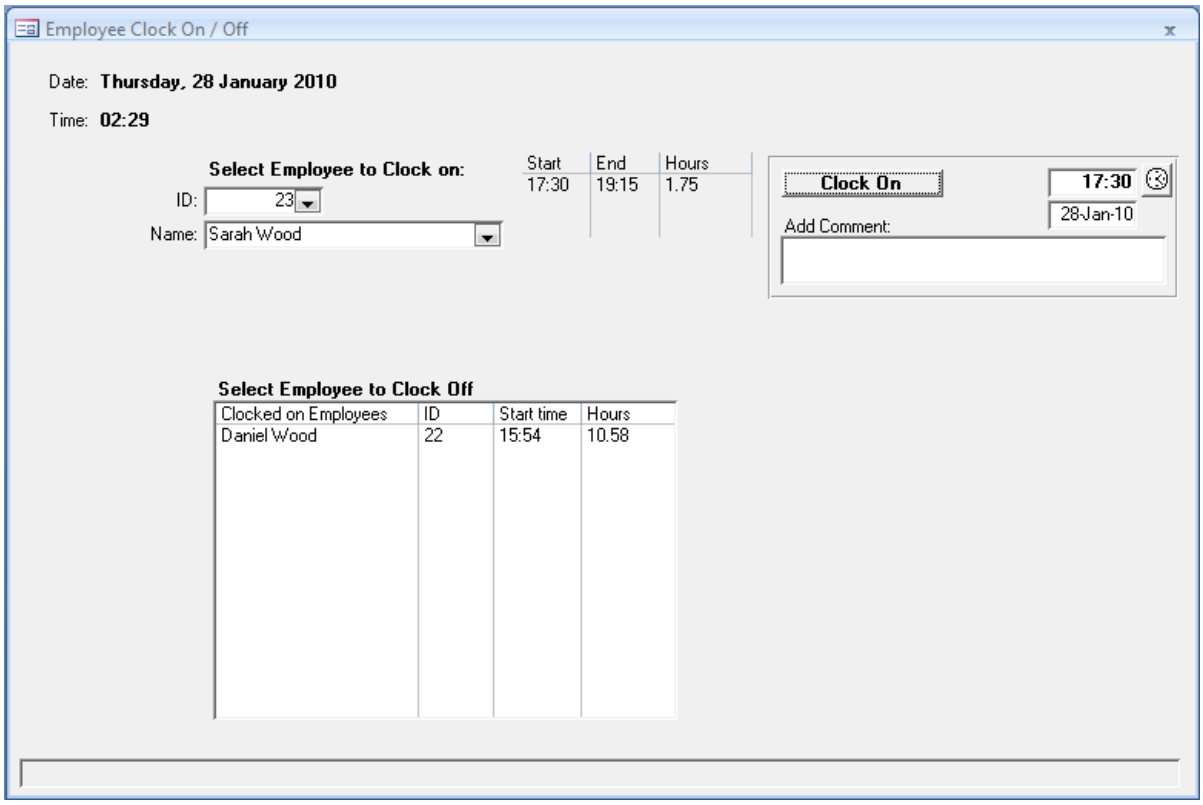
Employee menu

Provides functions for recording employee work hours and generating pays.

Clock on / off

FUNCTION: Employee time clock hours worked recorded by clocking on and off when start and finish work.

USE: Enables Employee hours to be recorded for later approval and generation of pays.



When an Employee wants to clock on they select their record and then click clock on. If they have an assigned start time on the day they are clocking on then the clock on function will automatically adjust their start time to this (provided it is after the actual time). Comments can be used to pass on notes regarding this work period these will be displayed when the work record is being reviewed for approval.

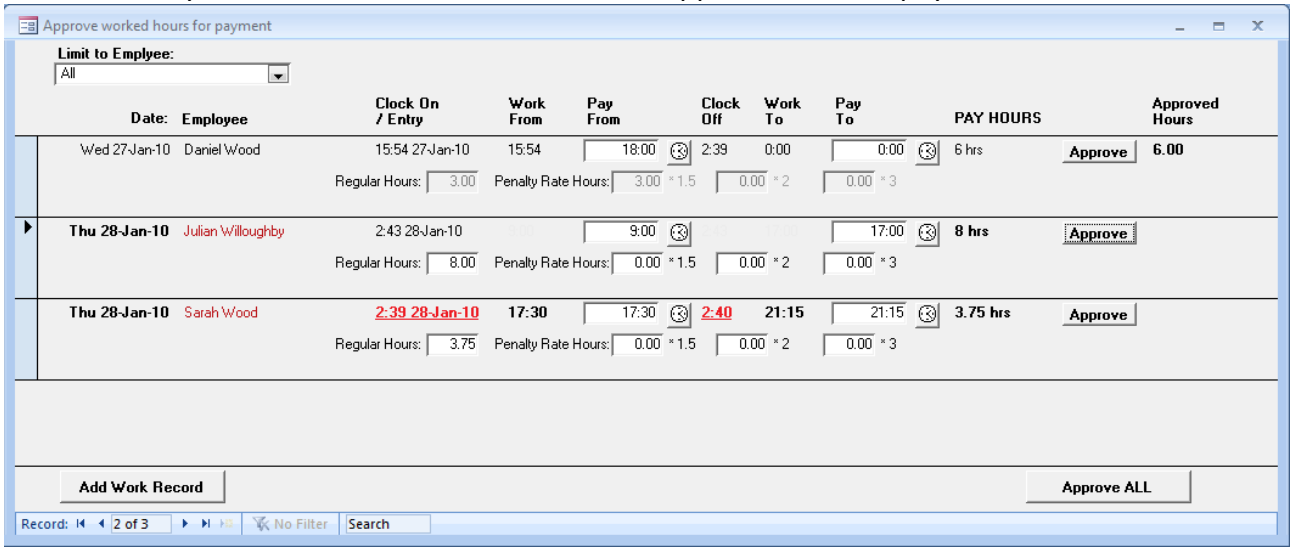
To clock off the employee can be selected their record from the list of employees clocked on and the clock off function will then be displayed for them to clock off, along with the option to update or add a comment.

Approve hours

FUNCTION: Displays work records for review and approval.

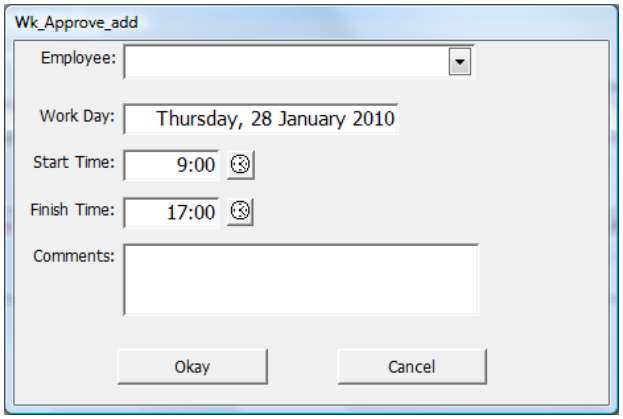
USE: Before a work record can be included in a pay it must be approved. This screen is used to approve pay records.

In this screen you can review or add work records, approve them for payment or delete them.



There are 3 records shown here.

1. The first record has been approved, this is indicated by a figure under the approved hours. You will notice that there are several times shown. The Clock on/ Entry date and time is when the actual record was created or when they clocked on. Work from is the time they entered as their clock on time. A pay from time can be entered to update the time they are being paid from. Similarly the clock off time is the actual time they clocked off and the pay to time can be entered to over ride this. The total hours to be paid is displayed under pay hours. If there are penalty rates to be paid the times for these are entered on the second line of the record.
2. The second record was generated by clicking Add Work Record. For records created this way there is no work from / to times and no clock off time.
3. The third record is awaiting approval. If there are any anomalies with a record these will be highlighted in red. In this case the clock off time was before the entered work to time.

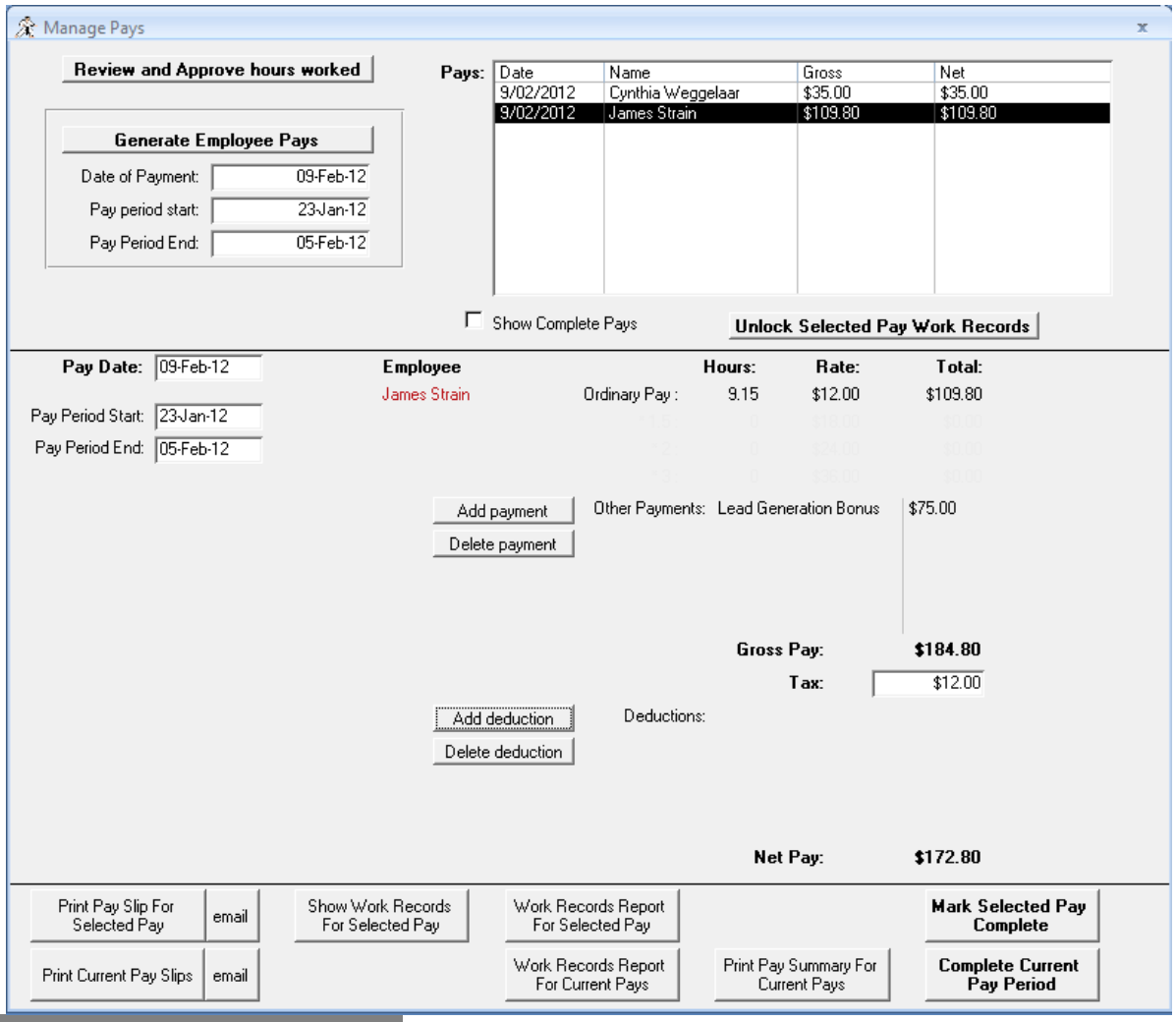


Clicking Add Work Record will open the screen at the left. Simply enter the employee and select the date, start and finish times.

Manage Pays

FUNCTION: Displays work records for review and approval.

USE: Before a work record can be included in a pay it must be approved. This screen is used to approve pay records.



Review and Approve hours worked – this button will take you to the Approve Hours screen. There you can approve work records to include in pays.
Generate Employee Pays – This will generate pays for any work records that have been approved. If there are work records outside the pay period dates you will be informed of this and given the option to include or skip these.
Pays – When Employee Pays have been generated they will appear here. Selecting a pay from the list will display details for this screen in the screen below. Payments and deductions can be added to this pay record and Tax entered.

Buttons at bottom of screen reporting functions including generating pay slips. Once processing of pays is complete then the Mark Selected Pay Complete or Complete Current Pay Period are used to either finalize 1 or all pays. Completing period also sets dates for next period.
SAMPLE PAY SLIP

Pay Slip

Seido Karate - Grovedale
353 Torquay Rd
Grovedale 3216
Ph (03) 5241 5345
ABN 15442856619

Pay Date: **02-Jul-09**
Pay Period: **15-Jun-09**
To: **28-Jun-09**

Employee's Name: **Sarah Wood**

Employee's ID: **23**
Job Title: **Instructor Nidan**
Ordinary Pay **$15.00**

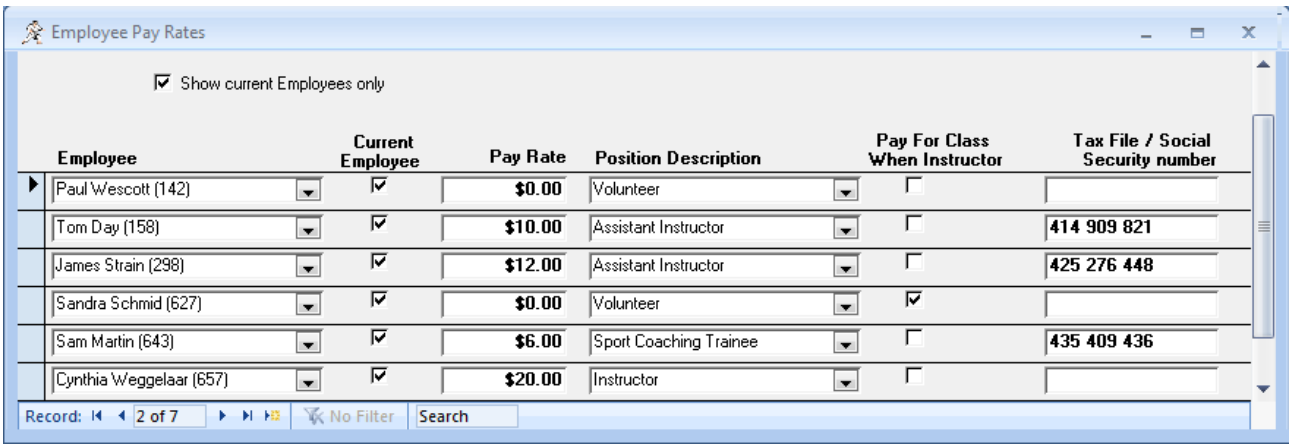
	Hours	*Rate*	*Total*
Ordinary Hours :	6.5	$15.00	**$97.50**
Lead generation			**$75.00**
		Gross Pay:	**$172.50**

Deduction	*Total*
Taxation	**$10.00**
Net Pay:	**$162.50**

Employees

FUNCTION: Maintain employee records.

USE: To be able to record employee hours and generate pays they must have an employee record these are maintained with this screen.



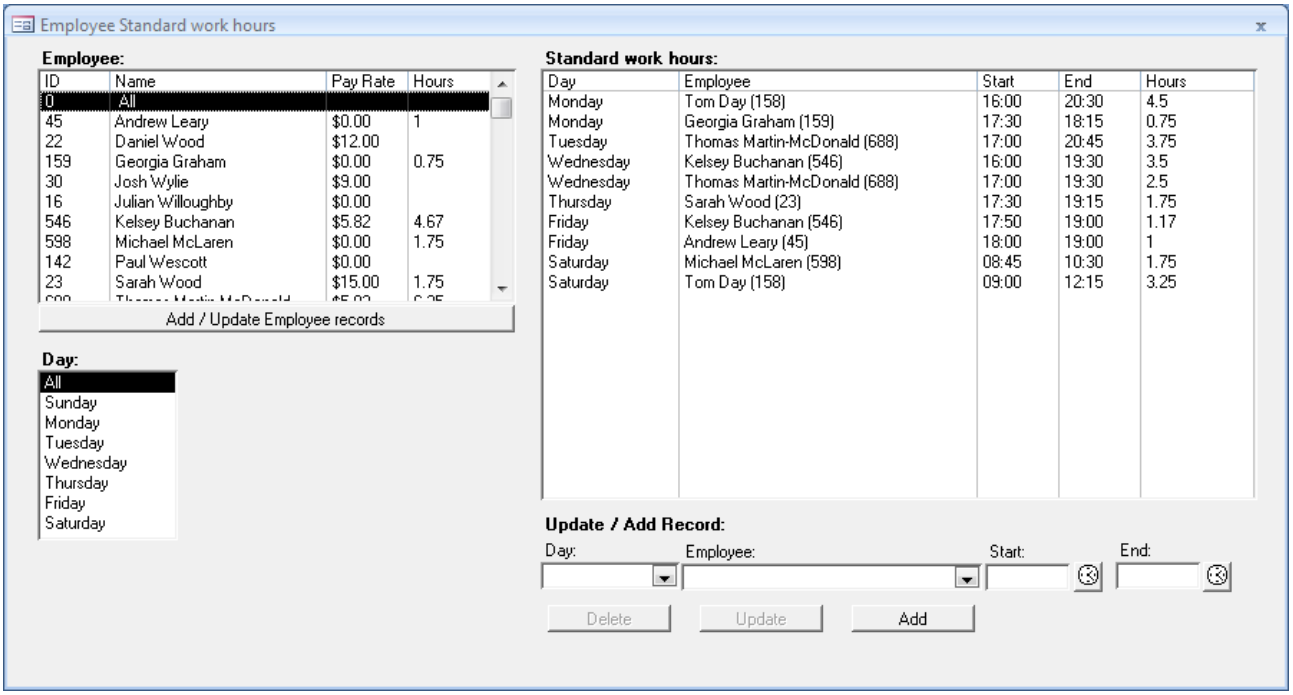
Employee	Current Employee	Pay Rate	Position Description	Pay For Class When Instructor	Tax File / Social Security number
Paul Wescott (142)	☑	$0.00	Volunteer	☐	
Tom Day (158)	☑	$10.00	Assistant Instructor	☐	414 909 821
James Strain (298)	☑	$12.00	Assistant Instructor	☐	425 276 448
Sandra Schmid (627)	☑	$0.00	Volunteer	☑	
Sam Martin (643)	☑	$6.00	Sport Coaching Trainee	☐	435 409 436
Cynthia Weggelaar (657)	☑	$20.00	Instructor	☐	

To generate an employee record just go to the new record and select employee from list of members (you must add as a member if not already before you can add as employee, if you do not want employees in with other member records then create a Program / Style just for Employees, you can call it Employee). Once an employee is no longer current uncheck the Current Employee check box. You also enter their pay rate and position description on this screen. If 'Pay for Class When Instructor' is selected work records will automatically be generated for any class that they are recorded as an instructor or assistant in the class entry module.

Work Hours

FUNCTION: Maintain employees regular working hours.

USE: When employees clock on and off these hours will be used to determine start and finish times. Also provides a visual list of who is working on what days and total hours each employee is working.



You can limit the standard work hours shown by selecting an Employee or Day to show records for.

If you select a standard work hours record it's details will be shown in the Update / Add Record section. You can then delete it, modify it or add a new record.

Pay Summary

FUNCTION: Summary report of employee pays.

USE: When employees clock on and off these hours will be used to determine start and finish times. Also provides a visual list of who is working on what days and total hours each employee is working.

This report will produce a summary of all pays for period entered. If an employee is selected then it will produc

Pay Summary

Seido

Report from: 18-Jun-09 to 02-Jul-09

Pay Date	ID	Employee Name	Job Position	Hours	Gross Pay	Ta
Thursday, 18 June 2009						
	23	Sarah Wood	Instructor Nidan	3.5	$52.50	$0.0
	45	Andrew Leary	Volunteer	1	$0.00	$0.0
	142	Paul Wescott	Volunteer	0.75	$0.00	$0.0
	158	Tom Day	Sport Coaching Trainee	6.5	$37.83	$0.0
	546	Kelsey Buchanan	Sport Coaching Trainee	5	$29.10	$0.0
	598	Michael McLaren	Volunteer	8	$0.00	$0.0
	688	Thomas Martin-McDonald	Sport Coaching Trainee	15.92	$92.65	$0.0
		Total payments for 18/06/2009 (7)				
			Totals:	40.67	$212.08	$0.0
Thursday, 2 July 2009						
	16	Julian Willoughby	Volunteer	8	$0.00	$0.0
	22	Daniel Wood	Instructor	6	$180.00	$0.0
	23	Sarah Wood	Instructor Nidan	6.5	$172.50	$10.0
	45	Andrew Leary	Volunteer	1	$0.00	$0.0
	158	Tom Day	Sport Coaching Trainee	11.25	$65.48	$0.0
	159	Georgia Graham	Volunteer	0.75	$0.00	$0.0
	546	Kelsey Buchanan	Sport Coaching Trainee	4.5	$26.19	$0.0
	598	Michael McLaren	Volunteer	2.58	$0.00	$0.0
	688	Thomas Martin-McDonald	Sport Coaching Trainee	11	$64.02	$0.0
		Total payments for 2/07/2009 (9)				
			Totals:	51.58	$508.19	$10.0
			Grand Totals:	**92.25**	**$720.27**	**$10.0**

Employee Pay Summary

Seido Karate - Gr

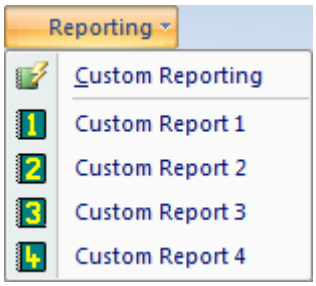
Employee's Name: **Sarah Wood**

Employee's ID: **23**

Job Title: **Instructor Nidan**

Report Period: **18-Jun-09 to 02-Jul-09**

Pay Date	From	To	Hours	Gross Pay	Tax	
18-Jun-09	1/06/2009	14/06/2009	3.5	$52.50	$0.00	
02-Jul-09	15/06/2009	28/06/2009	6.5	$172.50	$10.00	
		Total:	**10**	**$225.00**	**$10.00**	**$**



Reporting menu

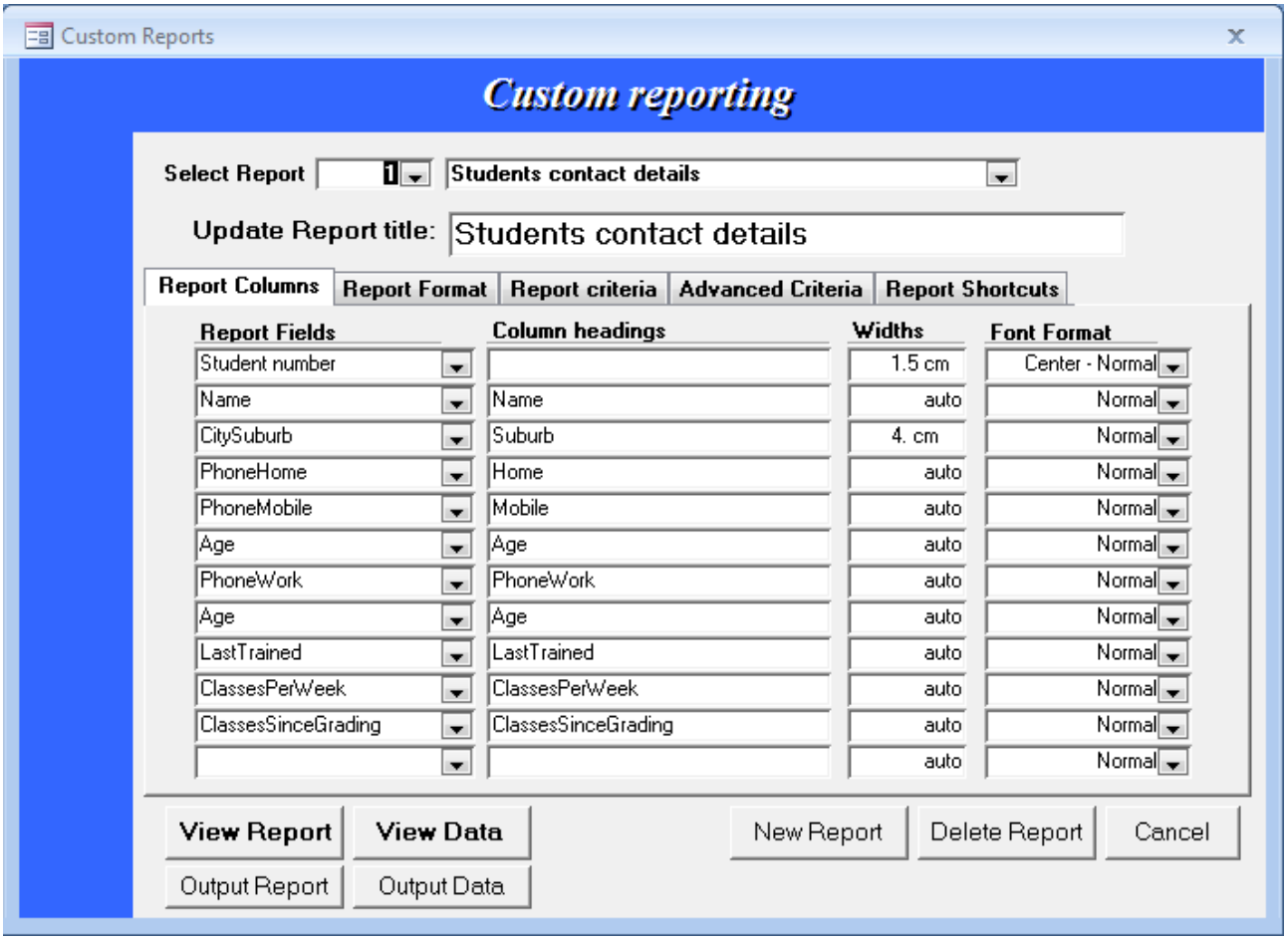
This menu contains the custom reporting function and shortcuts to up to 4 custom reports of your choice.

Custom reporting

FUNCTION: Create, run and manage custom reports.

USE: Custom reports enable you to present information in a way tailored to your needs; the data you need and the layout you need.

With this you are provided with a simple and effective way of creating and managing your individual reporting requirements. Initially you are supplied with a number of custom reports that meet specific reporting requirements and at the same time provide a template that you can use for your own reports.



Selecting an existing report.

Existing reports can be located using the drop down boxes by report number or name.

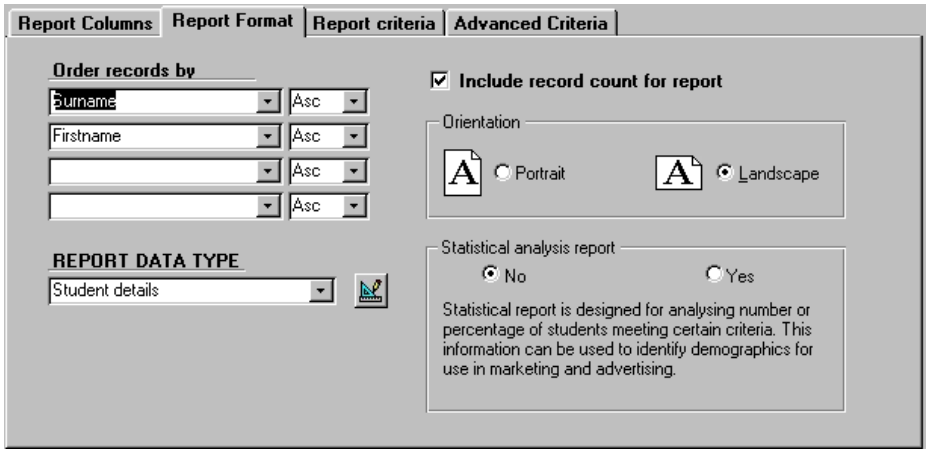
Creating new reports.

If you require a new report there are 2 ways you can initially create it: You can create it as a blank report and enter all the details; create a copy of an existing report you have.

Model on existing: This is the easiest way to create a new report that is similar to an existing one. Click the <New Report> button then enter the number of the report you wish to model the current one on and are presented with an exact copy of this report. You can then alter it to suit your requirements. (See below for further details on individual report sections).

Create Blank: Click the <New Report> button, when asked for the report to model on do not enter one, you will be presented with a blank report.

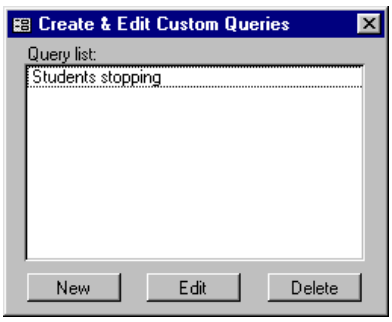
Report Format



Report data source:

Select the <Report Format> tab. When you create a new report you will see the entry under "Report Data Type" defaulted to "Member details". There are in fact 3 different ways you can get the data for your report.

1. **Select item from list.** When you drop down the list box you will see a number of data sources you can use. These are already set-up, to include information that may be relevant to their described purpose and filtering out other information. These are the best source of data for your reports.
2. **Use a standard table or query.** The last item in this list is <Table or Query>. If you select this, a second box will appear listing the tables in the database that contain data. You can select one of these to report from directly. Most of the names and so forth are obvious however some may not be and there is data such as control records that may also be present.
3. **Design your own query.** This requires knowledge of the data in the database, as mentioned above and also knowledge of building queries in access or SQL (structured query language). You should refer to documentation published relating specifically to these topics for further information in regard to this. To create your own queries:



- Click the <design> button next to "Report Data Type" list.
- Click <new> or select a query and click <edit> to maintain an existing query.
- Enter the query description as prompted.
- You will now be presented with a query in the Microsoft access query editor that you can edit to create the required query.
- Once finished close and save the query.
- Then close the query management screen.
- All queries created will appear in the Report Data List as <custom> then your query name.
- To use these queries simply select them from the Report Data Type list.

Note: Selecting you data source should always be the first thing you do, as this will determine what fields are available for the report.

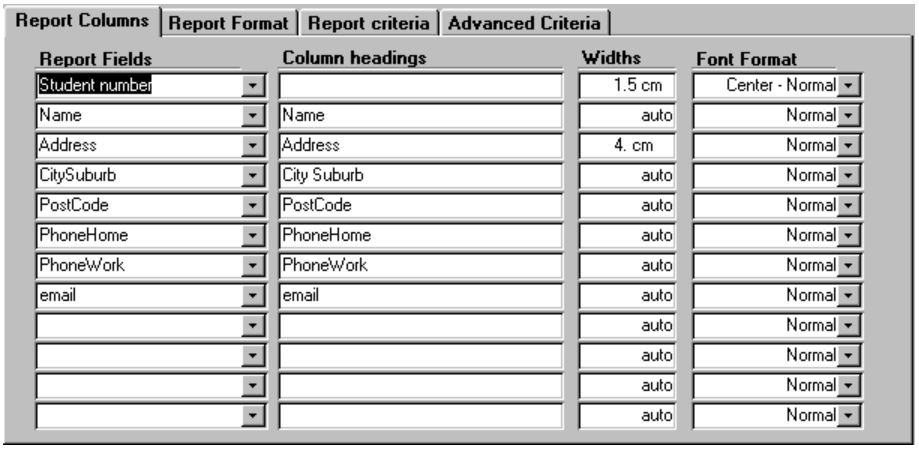
Statistical Analysis reports:
These reports give you the ability to summarise and look at trends in your data. If you wish to produce a statistical report select this now. You will notice some report options that do not affect statistical reports will now be removed.

Order of records on report:
Select the <Report Format> tab (not shown for statistical reports). You will see the heading "Order records by" with 4 drop down boxes underneath. Fields selected in these, stating with the top one, will order the records on your report. The default is ascending order, to change to descending order alter the selection box of the corresponding row from "Asc" to "Desc".

Record Count:
Check the <Include record count for report> check box to have a record count placed at the end of your report.

Orientation:
There are two formats you can use landscape or portrait. These are standard A4 layouts. You can adjust your margins and so forth of these reports but the actual data layout is controlled within the report it self and will not change if you alter the page size or other settings using the page set-up function.

Report Columns



Report Columns | Report Format | Report criteria | Advanced Criteria

Report Fields	Column headings	Widths	Font Format
Student number		1.5 cm	Center - Normal
Name	Name	auto	Normal
Address	Address	4. cm	Normal
CitySuburb	City Suburb	auto	Normal
PostCode	PostCode	auto	Normal
PhoneHome	PhoneHome	auto	Normal
PhoneWork	PhoneWork	auto	Normal
email	email	auto	Normal
		auto	Normal
		auto	Normal
		auto	Normal
		auto	Normal

Report Fields:
In this column you enter the data source for the individual columns on the report.

- You can use the drop down list to select columns returned by the query in you data source.
- Or you can use formulas or functions to arrive at a value to display, some simple examples follow:
  1. **(Format(DOB, "Medium Date"))** – Will display DOB (date of birth) in the computers medium date format ie. “01-Jan-90”
  2. **(Left (Firstname, 1) & ". " & Surname)** – Will display the first name initial and surname. Ie. “J. Smith”
  3. **(AnnualFee /12)** – Will display the Annual Fee as a monthly rate.
  4. **(Iif (Sex="M","Male","Female"))** – Will show the sex as either Male or Female.

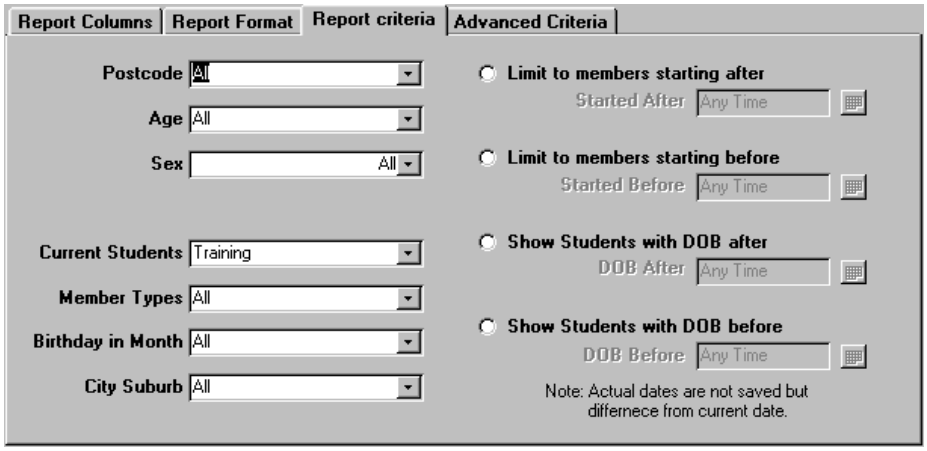
For more information on these and other functions refer to a Microsoft Access SQL guide

Column headings:
The Column heading setting controls the headings that are displayed on reports.

Widths:
Use the Widths Column to control the width of the text being displayed.

Font Format:
The Font Format Column allows you to Narrow, Bold or Italic text as will as to choose if it is to be justified right, left or centred.

Report Criteria



Note: this tab is not always displayed; if for the data source you have selected there are no pre-defined selection criteria this tab will not be present.

Drop down boxes:
For most of these the default will be "All" selecting this will show all values while selecting a specific value from the list will show only records that meet that criteria.

Dates:
Where dates are used as selection criteria the default is any date normally. To alter these select the selection box beside the entry to change. When you do a default date value will be populated. You can now either over type this or use the Calender button to select another date.

Advanced Criteria

Additional Criteria:
Into this text box you can enter additional selection criteria for your data. This must be in Microsoft Access SQL format.

To assist in this on the left hand side is shown a list of available fields, selecting these and clicking the "add" button will move them to the Criteria. The common operators are also listed to assist in criteria construction.

Viewing Report and Report Data

View Report:
The view report button will open a report with the specifications that you have entered. If the format of the report is not exactly as you wanted it, close the report, make changes required and open again.

View Data:
The view Data button will open a Data sheet containing the data you have selected. The headings however will not necessarily be those that you entered. You can also transfer data to Microsoft word of Excel if you have them installed. By using the office links functions on the toolbar. (Only available if you have Microsoft Office installed on the PC).

Output Report:
When you click this option you will be presented with a dialog box asking the format you would like to save the report in, then prompted for the location to save the file to. This enables you to save reports for future reference or for sending electronically.

Output Report:
When you click this option you will be presented with a dialog box asking the format you would like to save the data in, then prompted for the location to save the file to. This enables you to save data for future reference, for sending electronically or for use in functions such as doing mail merges.

Graph Data:
Graph Data is only available for statistical reports. The Graph Data button will produce a bar graph of the number of occurrences of the first Column of data selected for the report; any other columns are ignored.

Hints for Using Custom Reports

Modifying Reports:
There will often e times when you may want to see your data reported in a slightly different way to that which you normally use. Beware; a few small changes to a report can take a lot of effort to undo when it comes time to change it back. So instead of changing the original make a copy of it, using the create new report function, and model it on the one you wish to change. If you don't wish to keep the changes delete the report once you are finished.

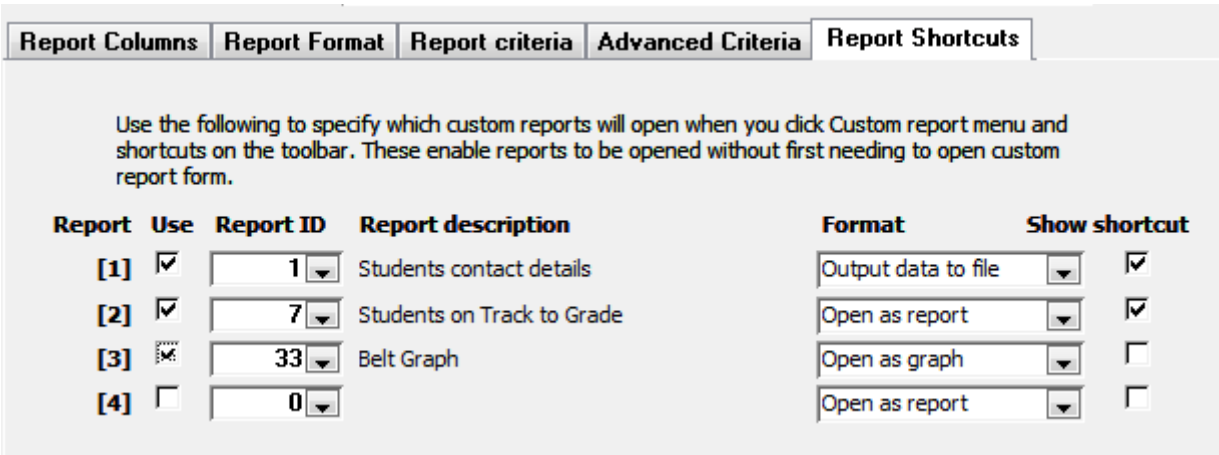
Designing Reports:
Consider carefully the data you are going to need and how you want it formatted. Before you spend a lot of time formatting your report look at the data with the view data function to ensure you will get what you are after.

Report Layout:
Avoid trying to put to much data on a report. The more crammed a report is the more difficult it will be to read and interpret. You can have up to 12 columns on a report however generally 8 is the most we recommend to make reports easy to read and interpret.

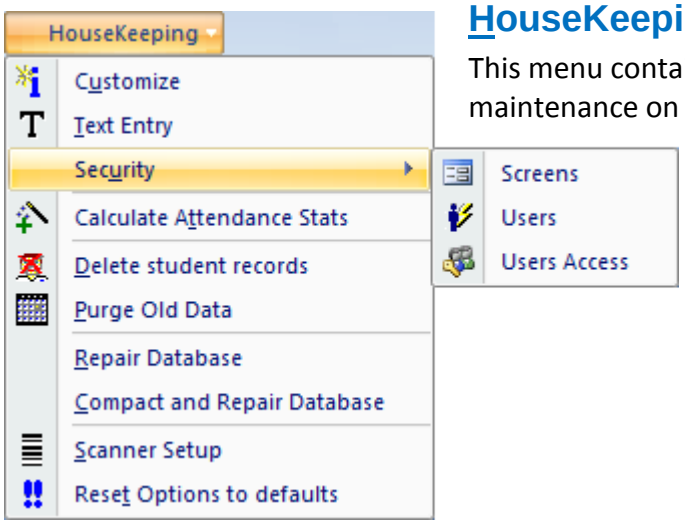
Report Errors:
"The field you have entered is either incorrect or contains a parameter for use entry." This error indicates that as it is your data cannot be interpreted, however it may just be that you intend to have a parameter entered when the report is opened. If this is not the case try simplifying or breaking up the expression entered in order to determine where it is going wrong.

Custom Reporting shortcuts

If there are custom reports you use regularly you can set up shortcuts to them so that you don't have to open custom reporting to access them. This also means that you can restrict access to custom reporting using the security functions but give users specific reports that they can still access through custom reporting shortcuts.



You can set up to 4 report shortcuts. To have a report appear in the reporting menu check the Use checkbox, select the report number to be opened and then the format it is to be opened in. You can also have a shortcut to the report appear on the shortcut menu by checking the shortcut checkbox.



HouseKeeping menu

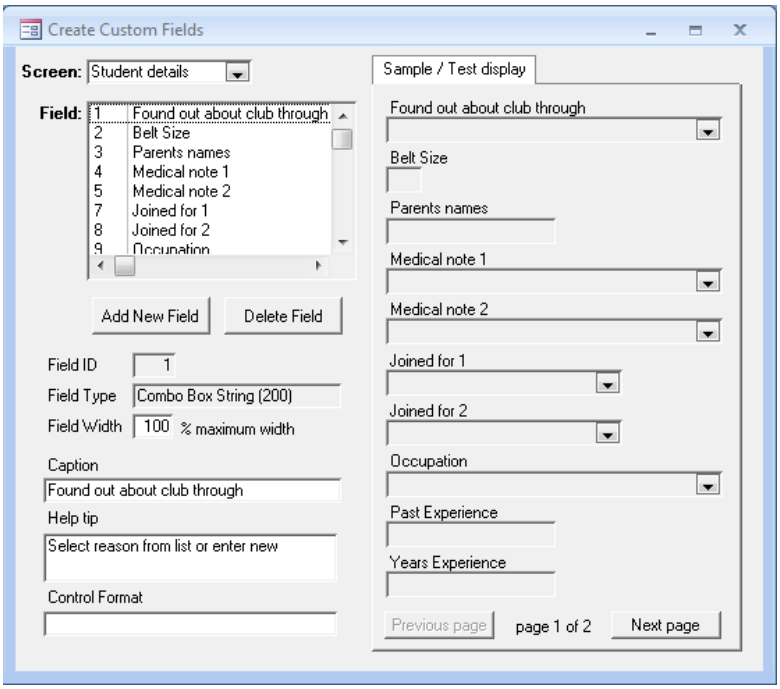
This menu contains functions that perform general maintenance on the database.

As well as security set up.

Customise

FUNCTION: Create and maintain custom fields.

USE: Use custom fields to store information that is not contained in the standard set-up about leads and members.



ADD a field:

- Click Add New Field.
- Enter numeric ID for field when prompted, this will determine the place in the list that the field is displayed.
- Enter field display type when prompted.
  Types are:
  Text box – standard entry field

Combo box – displays a drop down list.
Check box – is clicked to toggle true / false.

- Enter field data type, if you selected Check box you will not have to do this.

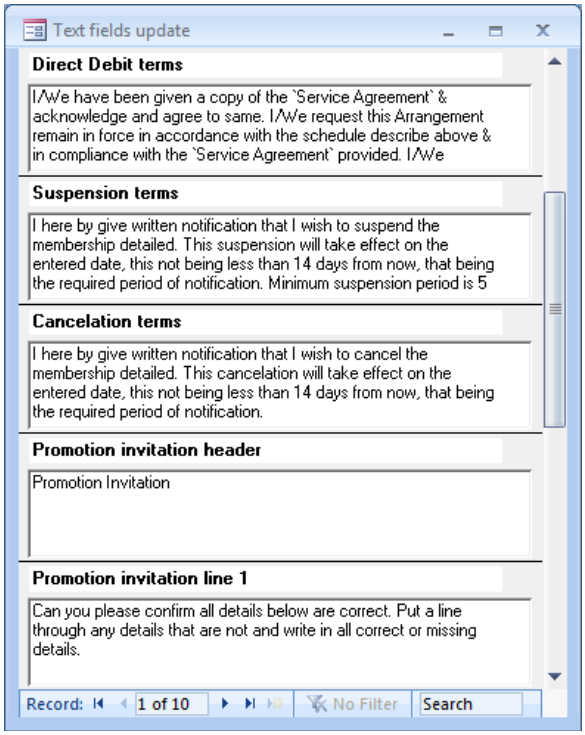
1 Integer, number between –32767 and 32767 (stores data in small amount of space.)
2 Double precision number numeric data. (Will handle decimal numbers)
3 Currency
4 Date
5-255 String (this allows you to type standard text up to the number of characters entered).

You will then be informed that a new field has been created and you can enter the description. If you enter the exact same description for a Lead and Member field then the information in this field will be copied from the lead to the member if you use the change lead to member function in the leads and prospects screen.

Text Entry

FUNCTION: Enter text to appear on Direct debit forms and promotion invitations.

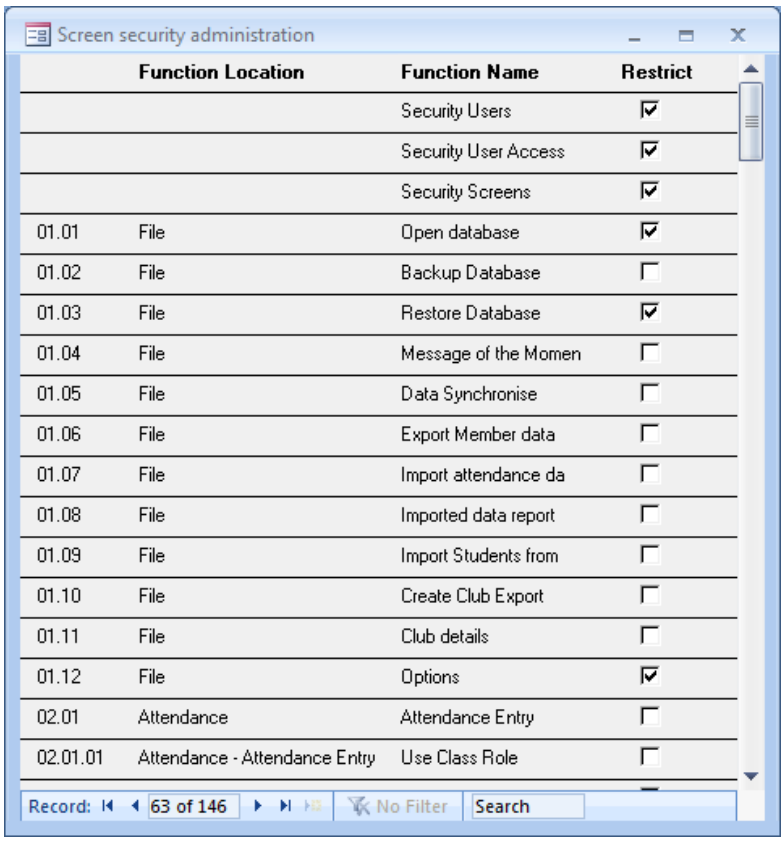
USE: If you use direct debit forms or promotion invitations then you can customize the text that will appear on them in this screen.



Security - Screens

FUNCTION: Select which screens have restricted access.

USE: You can use security to determine which users are able to access which functions. This function determines which screens will have security restrictions.



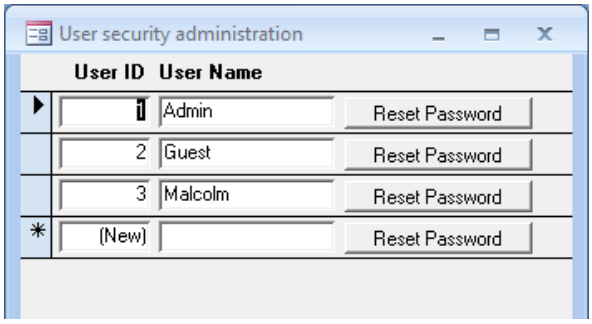
On the left is the menu number of the item 01.01 will be the first item in the first menu heading. The exception to this are the security functions that appear first. If you are going to apply security to your database then you must restrict access to the security screens or users could update their access.

The function Location gives the menu headings this is located under. The function name is what access this option grants. So 01.01 File Open Database, checking this will mean access to the open database screen will be limited to those who are assigned access. Any option that is unchecked all users will have access to.

Security - Users

FUNCTION: Define users.

USE: In this screen you enter the user names and set up their password.



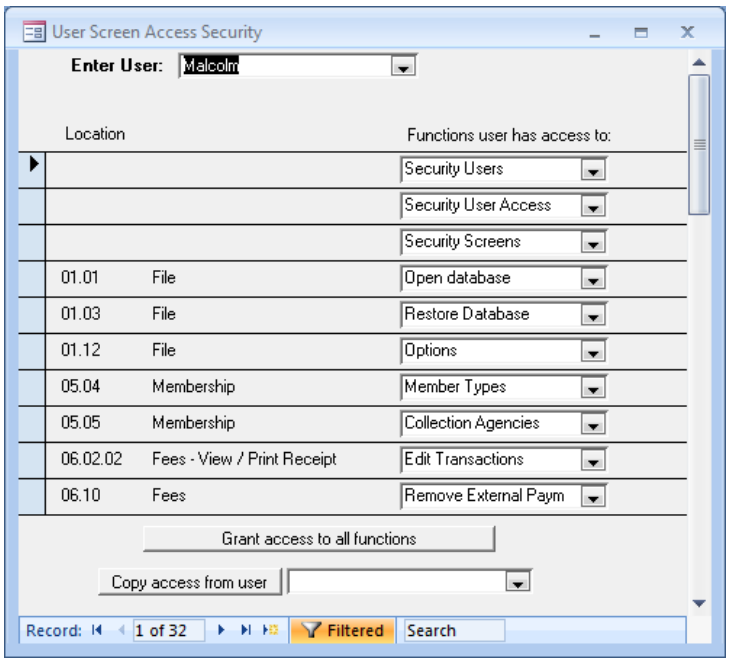
Initially passwords are set to the first 3 letters of the user name. If a user forgets their password you can reset it for them.

When you first install Club Administrator there is already an Admin user set up with no password. If you are going to use the security features on club administrator you should set a password for this.

Security – Users Access

FUNCTION: Define what screens and functions a user has access to.

USE: In this screen you select the screens and functions that a given user is going to be able to access.



If a screen or function has been selected in the Security – Screens function then users will only have access to it if they are given it here in this screen.

There are three ways to grant access.

- Click Grant access to all functions and every screen that is restricted will be given to the selected user.
- Select a user and then click Copy access from user and their access will be copied from the selected user. This is particularly useful if you want to assign the same access to several people.
- Or you can go to a new record and select the screen or function you want to grant the user.

Just be aware that you must always have at least 1 user with access to the security functions or you could lock your self out.

Calculate Attendance Stats

FUNCTION: Recalculate member's attendance statistics.

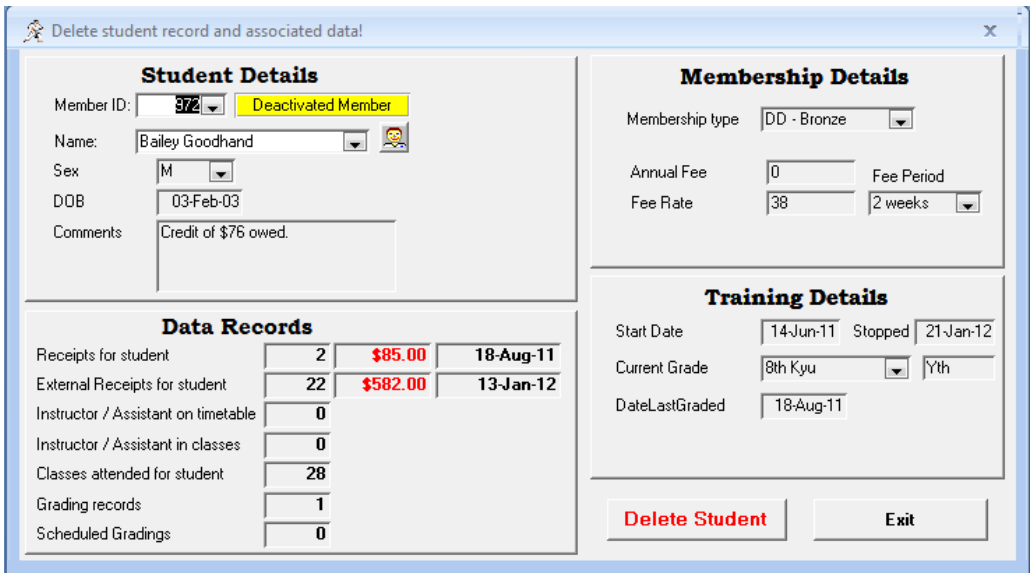
USE: If you have the option to only calculate attendance statistics on start up selected then members average attendance, last attended date and other attendance information will not be recalculated when they are entered in classes, to force recalculation use this option.

Delete Member Records

FUNCTION: Allows the removal of member records from the database.

USE: If you have member records on file you wish to remove entirely this screen allows you to do this.

This screen was added to Club Administrator at the request of users. Under normal circumstances there is no need to remove member records from your database and although we have provided this function we do not recommend it's use. Financial records will be retained and assigned to member '0' this means you can not identify who these transactions originally belonged to. Attendance data is removed and the number of members in the class kept as a total where individual records are removed although not all reporting functions will be able to utilise this summary information.



Purge Old Data

FUNCTION: Remove data no longer required from database.

USE: This database is designed to function with large amounts of data. However if data is no longer required its removal may increase performance.

Using this function all transactions or attendance records older than a set date can be removed. Generally there is no need to do this.

Repair Database / Compact and Repair Database

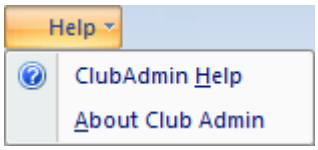
Should the application become corrupted for some reason this may be run to restore integrity, this also compacts the application file. This should be done from time to time (once a fortnight should be adequate) as some temporary data is stored in the actual application program and this will increase its space over time, while also slowing the storing of data.

Scanner Setup

You use this screen if you are using a scanner that needs to have prefix or suffix characters set. When member's barcodes are scanned in the class entry module a prefix character to identify it is scanning a member barcode and then another character to signal it has finished. Some scanners produce these automatically some can be programmed to. These options are explained more fully in the Class Entry Guide.

Reset default options

This will reset all the options to the initial values. If you have moved the club.mdb file from the directory where the application file ClubAdmn.mde resides then this will cause errors. Also any custom settings will be lost.



Help menu

Club Admin Help

Will open the Club Administrator help file… this one you are now reading.

About Club Admin

Will open the Club Administrator splash screen. You can use this to confirm what version you are currently using. You can also alter the release level and re-register you copy using this screen.

Class Entry Module – CE

Overview

The Class Entry module is designed to allow members to record their attendance. It can also be used to record instructors and report on those in classes and scheduled for promotions. It can run on the same PC as the main module however in most instances it will be preferable to have it running on a dedicated PC, the exception being where there are a relatively small number of members.

Class Entry Data

Member and class information needs to be loaded into the CE. There are two ways this can happen, either by transferring files or transferring information across a network.

Networked Computers

If the computer that contains CE and the main administration PC are on a network then you use the File – Data Synchronise screen to transfer the data. This is the preferable method of managing data transfer as it can all be done from the main module. See File – Data Synchronise for more details. This also allows the use of the Attendance – Monitor Attendance Entry function where you can immediately see the details of members registering.

File Transfer

If the computers are not able to connect to one another then you will need to use file transfers to send data between the two computers. There are two parts to this: sending the member and class information to the CE computer and receiving the attendance information back.

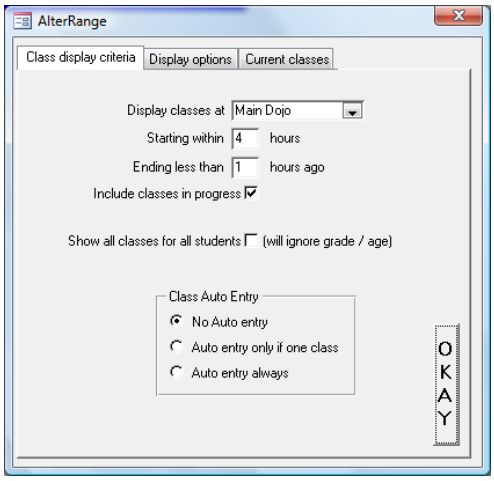
1. Sending Member and Class data:
    a. In the Main module select 'File – Export Member Data' this will create a file trans.mdb that contains all the data required by the CE.
    b. Move this file to a location that can be accessed by CE.
    c. In CE close the member entry screen, and click Import Data on the menu shown. Use the dialog box presented to locate the trans.mdb file and press import.
    d. The number of members, classes and so on imported will be shown on the screen to confirm success of this operation. CE has now been refreshed with member and class information.
2. Receiving Attendance Data.
    a. In CE close the member entry screen, and click Export Data on the menu shown. Use the dialog box presented to select a location to save the file containing the attendance data. This file will be in the following format: xxxx9999.txt where xxxx is the first 4 letters of the location it is receiving classes at and 9999 is the export number it is performing.
    b. Move this file to a location where it can be accessed by the main module.
    c. In the main Club Administrator menu select 'File – Import Attendance Data', then use the presented dialog box to locate the file being transferred.
    d. Click Import to complete the operation, loading all attendance information collected by CE into Club Administrator.
    e. You will then be given the option to view a report of the data loaded.

Class Entry Display Configuration

There are several different options in the Class Entry module that you can use to configure how it will interact with members using the system.

What classes are displayed.

In CE close the member entry screen, and click Alter Display Criteria on the menu shown. The first tab of the displayed dialog is 'Class Display Criteria' this determines what classes will be displayed to members.



If you have more than one location configured in Club Administrator – Timetable – Locations, then you must select the location you wish to display classes for in the display classes at dialog box.

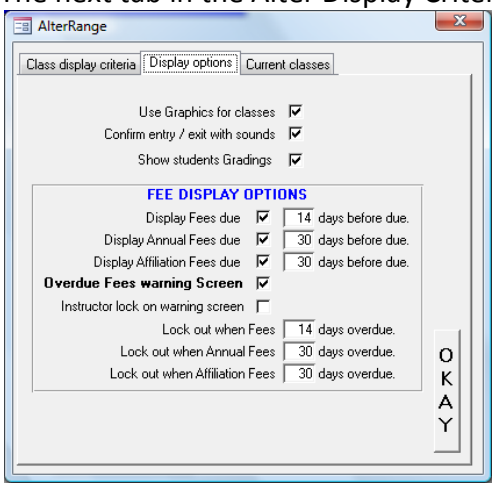
Next is the time span classes will be displayed for.

When a member logs in their age group and grade are used to determine the classes available to them. This feature can be turned off by checking the check box shown.

The final option is Auto Entry. If you are only going to have one class that is available for people to attend at any time then you can select Auto entry always and when they log into the system they will be automatically placed into the first available class without needing to select any. The Auto entry only if one class will only do this when one class is available but If there is more than one wait for the member to make a selection. This option should be used cautiously as it may lead to confusion, with members not selecting a class when they need to. Most commonly No Auto entry is selected and members will choose the class or classes they are attending one they log in.

Fee Warnings and display options.

The next tab in the Alter Display Criteria screen gives you various display options.



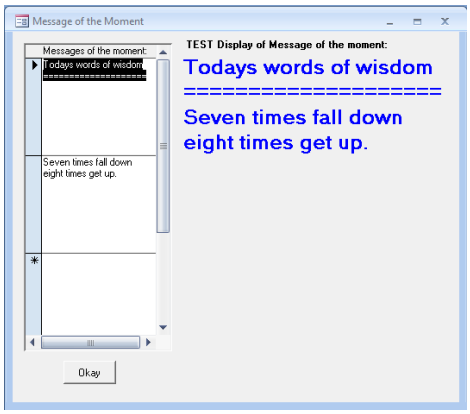
Check 'Use Graphics for classes' to allow images to be mapped over the buttons that will be presented with class names on them. This is particularly useful with young children. ('Screens – Display Options – Map location of Images' is used to configure these).

Sound files can be played for all or selected actions in CE. This is most useful for alerts in regard to overdue fees. ('Screens – Display Options – Record Sound Feedback' is used to configure these).

Any Grading or promotions that are scheduled in Club Administrator with the show in Class entry option checked will appear to members. To turn the feature off uncheck the 'Show members gradings' Check Box.

The remaining options on this screen determine how fees are treated in CE. The first three options determine how long before the due date of fees they are displayed to remind members they are approaching.
'Overdue Fees Warning Screen' checkbox is checked if you want a warning screen to appear when fees are overdue (this can be accompanied with an audible warning as detailed above).
'Instructor Lock on warning screen' if you select this option then when fees are overdue members will need to have an instructor enter an over ride password to allow them to enter class.
The final three times determine how long the warning screens can be displayed before a member is locked out from entering the system. This can have a distinct audio file associated with it.

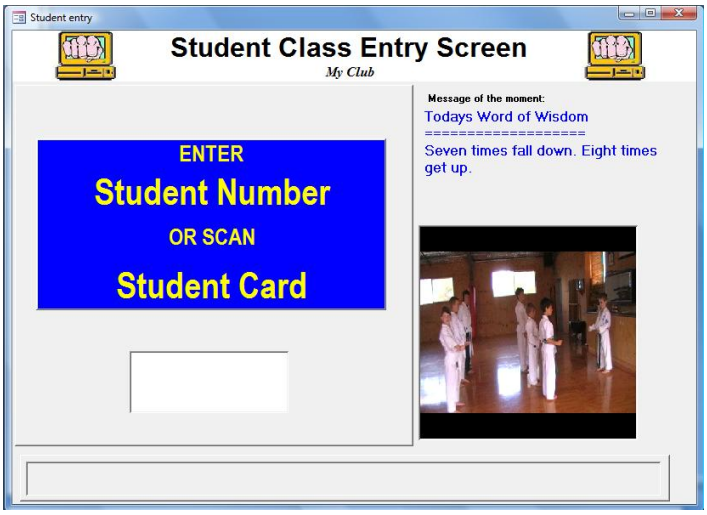
Message of the moment



A generic message can be displayed on the front screen to all users. This message can be set in Club Administrator and then will be transferred with other data or it can be set by selecting 'Message of the Moment' from the main menu. This will be over written by any message sent from Club Administrator (Note: updated messages only appear after the entry screen is closed and reopened).

When setting the message it is displayed exactly as it will appear in club administrator on the right.

Display Video



In CE close the member entry screen, and click Display Video on the menu shown. A dialog box will be presented for you to locate the video you wish to display. The will be shown on the bottom left of the main log in screen. This can be used to display adverts to members regarding products or events or to show highlights from recent events. Video will restart each time a new member logs in.

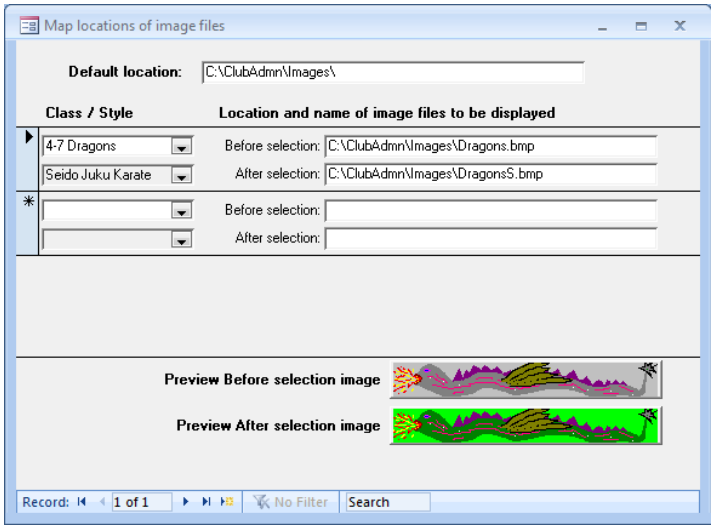
Note: when a video is set the text size for the message of the moment is reduced. This will mean it may not display exactly as it appeared in the message of the moment screen. The reduced size however means the full message should still display above the video.

Club name and logo.

Your club name and logo can be displayed on the main log in screen and the reports produced from the class entry module. After closing the main screen select 'File – Club details' from the top menu to set these.

Map images

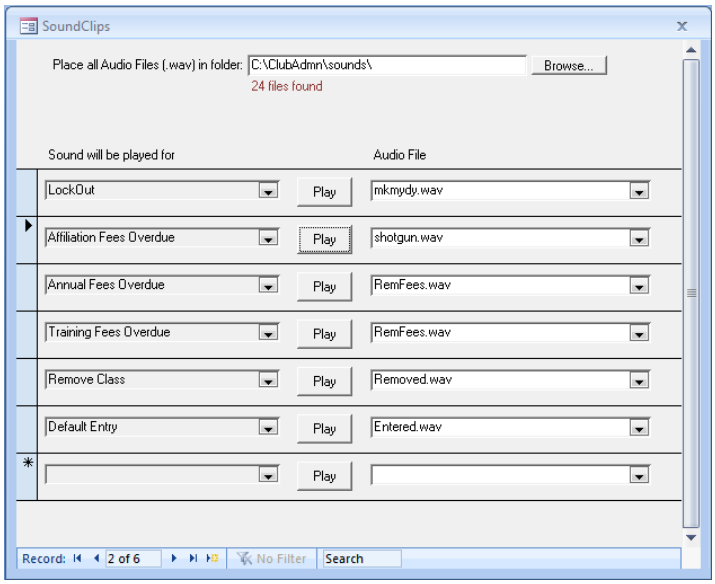
In CE close the member entry screen, and on the top menu select 'Screens – Display Options – Map location of Images'.



IN this screen you can assign images to be displayed in place of various classes. A few sample images are supplied with CE. You can use these as they are, edit them or make your own using these as a template. In the example shown a 4-7 Dragons class has been selected and dragon images selected to be displayed instead of the class name. Two images need to be assigned. One before the selection is made and one after the selection. Leaving a grey back ground to the image and colouring this fluorescent green will keep this consistent with those classes where text is displayed.

Set audio messages

In CE close the member entry screen, and on the top menu select 'Screens – Display Options – Record sound feedback'.



All sound files must be stored in the same folder. The location of this folder is set at the top of this screen. Then Audio files from this folder are selected to associate with the displayed actions or with different classes.

Several files are supplied with club administrator, you can record your own or use files from internet.

Using the audio feature is a way to ensure staff are aware when someone is attempting to enter class with overdue fees. This also embarrasses people and reduces significantly the number of people whose fees go into arrears.

Other settings

Instructors Password

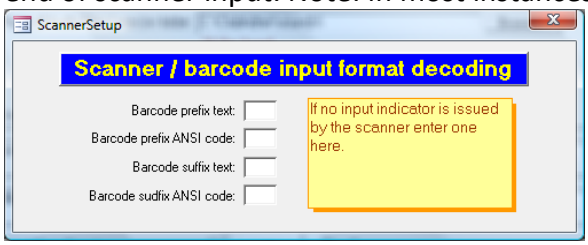
The instructor's password is used to allow members into class if this option is being used. It is also used by instructors to get instructor options. There is only 1 instructor password, this can be changed at any time by closing the main screen and selecting instructor password.

Time out period

When a member number is entered or card swiped if the screen remains inactive for a period of time it resets back to the initial entry screen waiting for a member number. This time out period can be set by closing the main screen and selecting Time out period from the menu.

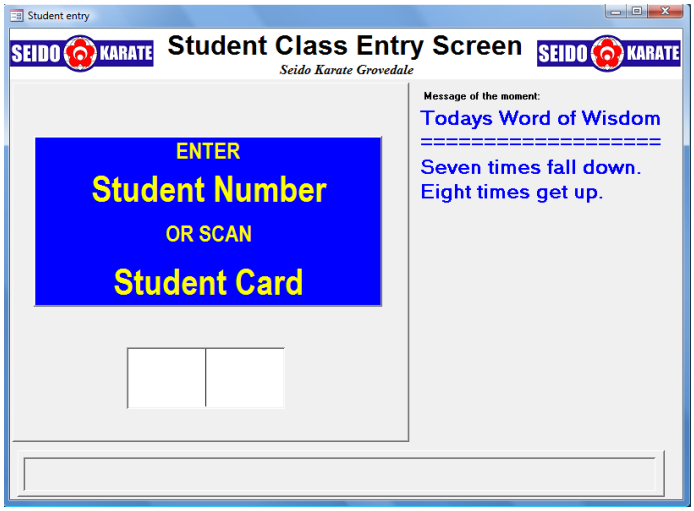
Scanner settings

Most scanners will work with CE with no configuration at all. It is designed to operate off the default settings for most scanners. The barcodes produced have * before and after the number and the scanner is expected to deliver a return character after scanning. If your set up will produce different results to this you can use this screen to set what characters will indicate the start and end of scanner input. Note: in most instances you do not need to set anything here.



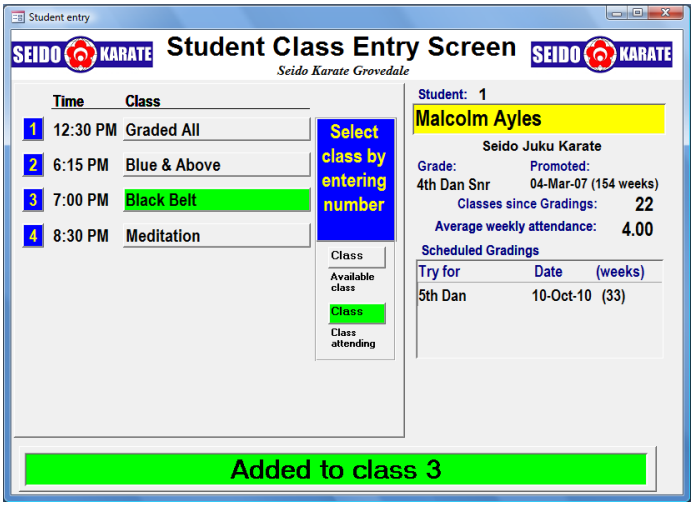
Members Screens

Log in screen.



This is the screen that is present while waiting for a user to input their number of swipe their member card.

Class Selection screen.



Once a user enters their member number or scans their member card the class selection screen is displayed. Here they can select from the list of classes available to them the class they wish to attend by pressing that number on the numeric keypad.

To remove a selection they just press that number again. Classes selected are highlighted in green.

If there is a birthday greeting selected in the sounds screen then this will play if it is their birthday.

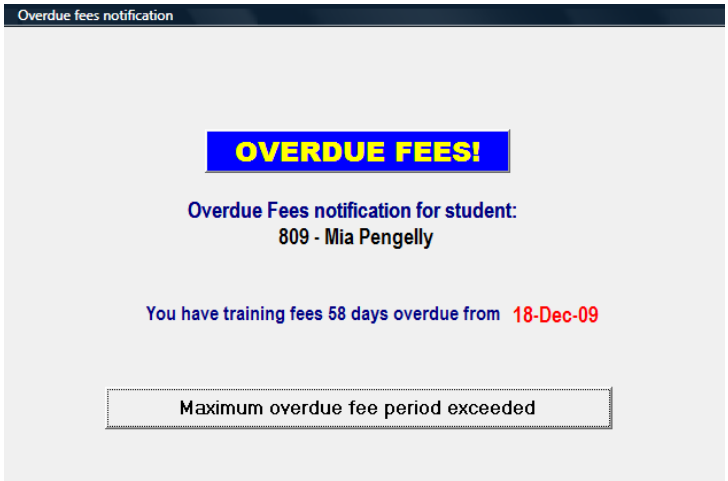
On this screen is displayed a number of important pieces of information. Their current level, when they where promoted and the number of weeks they have been that level for. The number of classes they have attended since their last promotion and their average weekly attendance. These are all important to give a member of how they are progressing and to keep them motivated in moving towards their next goal or promotion. It then lists any promotions that have been flagged to display along with the date and number of weeks to go. This can be a great motivator especially for young children as they see the weeks count down to the big day.

If fees are within the window where they are displayed these are shown below promotion information. If the member is on a class based membership then the number of classes remaining is shown above their name.

Once the member has finished recording their data they press enter again and control is passed back to the initial screen. If no action happens the screen will time out and return to the log in screen again also.

Overdue fees

When fees are approaching the due date they will be displayed at the bottom right of the screen when the user information is presented (see display settings). Once the due date is reached the overdue fee screen will open when they log in until the lockout date is reached the user can just press enter and then continue to enter their classes. After the due date pressing enter will return them to the initial log in screen.

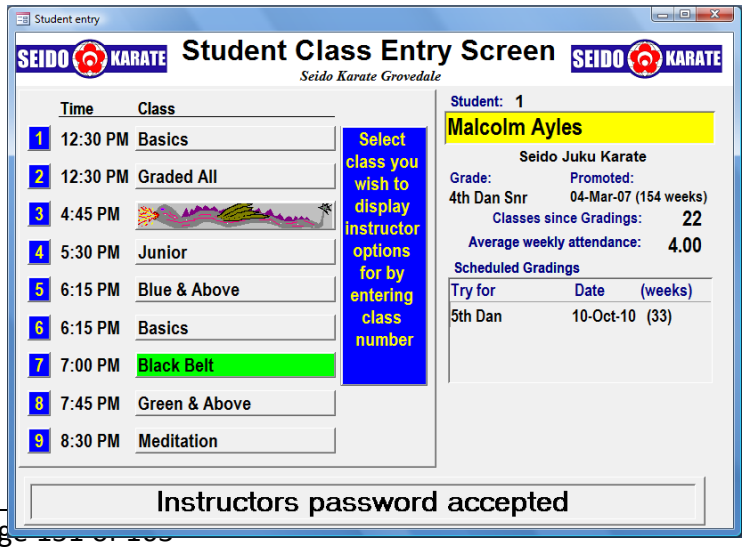


A similar screen will be displayed if member is on a class based membership and they have used their class allocation. With class based memberships the screen is only displayed when they try to enter a class and do not have sufficient classes to do so.

Instructor Screens

Instructor sign on.

Instructors swipe their card or enter their number the same as members. Then once they are at the class selection screen they press the minus key on the numeric keypad "-".
They are then prompted to enter the instructor password. Once the instructor password is accepted they will be shown all the currently available classes and

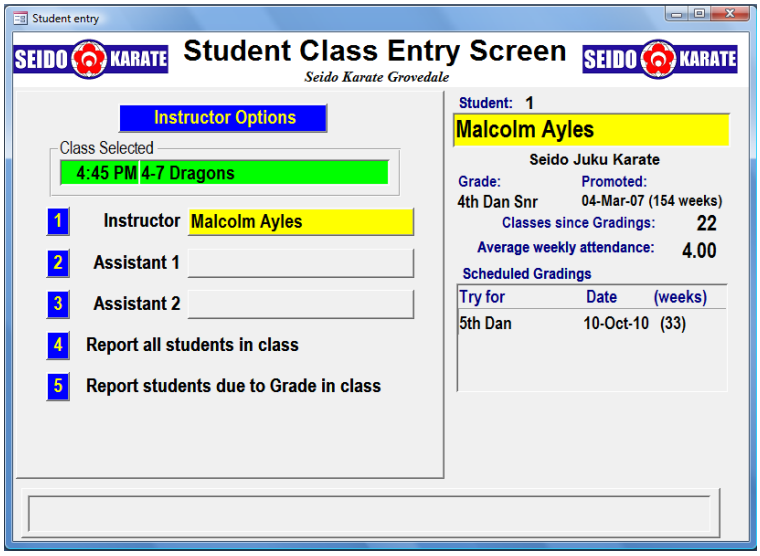


prompted to select the class they wish to see instructor options for.

They select the class by pressing the corresponding number on the keypad, the same as members entering the class.

Instructor options.

The instructor options screen shows the selected class in Green then the instructors and assistants for the class below this. To record your self as the instructor or assistant you press the appropriate number 1, 2 or 3.



There are also 2 reports available, all the members in the class or those due to promote. These are selected by pressing the appropriate number 4, 5 respectively.

Instructor reports

Both instructor reports operate in the same manner.

ClassEntry

Class: **4-7 Dragons** Instructor: **Malcolm Ayles**

When: **04:45 PM Monday** Assistants:

Students: **7**

ID	Name	Grade	Weeks Graded	Classes Graded	Average attendance	Sex	Age
819	Isaac Holland	9th Kyu Junior	8	6	0.77	M	6
807	Evelyn Robinson	Beginner Junior	33	25	1.42	F	4
815	Ned Clements	Beginner Junior	26	5	0.00	M	5
827	Lachlan Elevato	Beginner Junior	14	1	0.00	M	4
835	Julian Goodhand	Beginner Junior	3	1	0.00	M	4
836	Marcus Gatt	Beginner Junior	1	3	2.00	M	5
854	Riley Herman	Beginner Junior	0	1	0.00	F	4

< + > scroll down < - > scroll up < * > print < enter > close

Record: 1 of 7 Filtered Search

The records are displayed on the screen. With the options shown at the bottom. You can use the <+> and <-> keys to scroll up and down the report, <*> will send the report to the printer and <enter> returns you back to the previous screen.

The class list can be used to check all members are in the class as well as giving vital information about how long they have been at their current level, the number of classes they have done and how regularly they are attending.
The report of those scheduled for promotion also gives additional information about their requirements with a clear yes or no if these have been met.

Class: **4-7 Dragons** Instructor: Malcolm Ayles
When: **04:45 PM Monday** Assistants:
Students Grading within 8 weeks

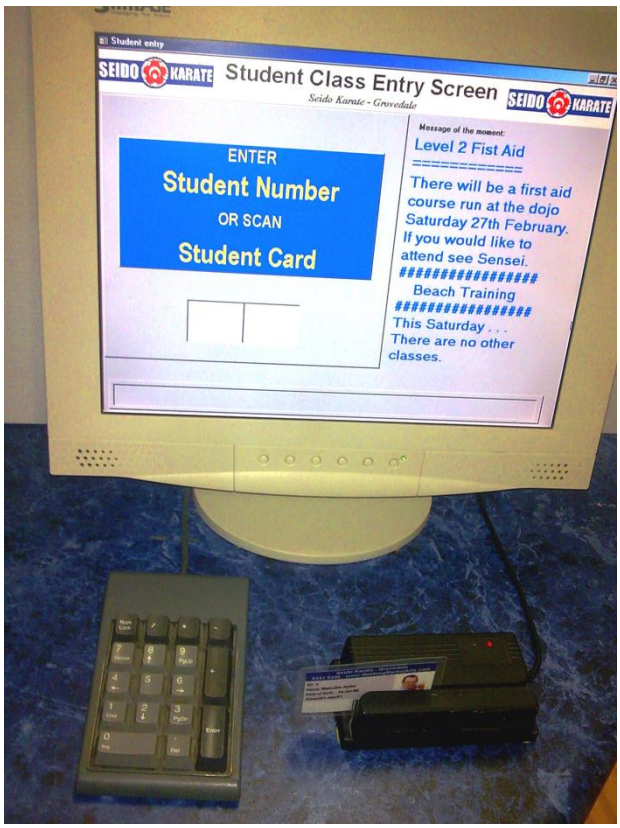
ID	Name	Grade	Weeks Graded	Classes Graded	Average attendance	Sex	Age
819	**Isaac Holland**	9th Kyu Junior	8	6	0.75	M	6
In 2 weeks try for: **8th Kyu**		Requirements:	4	10	Requirements met: **No**		

Note: as instructors may wish to take their time to look at this information there is no time out on the instructor screens so as such it is important for instructors to ensure they return to the main entry screen after they have finished.

Class Entry hardware

It is recommended where possible that the class entry system run on it's own dedicated PC. This way administration staff are able to make sales, receive fees and deal with other member request while not being concerned with members registering for class. This PC will not be doing very much however so it can be a very low spec PC any system that can run windows XP or above will be suitable.

The class entry module is designed to work on 800 * 600 pixels resolution. Most screens will be capable of operating at a rate higher than this but will also work fine when reduced to this rate.



For this reason any monitor will be sufficient, a small LCD monitor such as shown here is ideal.

You will need a numeric keypad as shown here. A scanner is optional as members can enter their numbers in the keypad. If purchasing a scanner a slot reader such as that shown here is recommended. However any scanner will perform the job. Bench mounted as opposed to hand held scanners will be preferable so members can scan their card without needing to pick up the scanner. If a hand held scanner is being used we recommend purchasing a stand or mounting it some other way so it does not need to be picked up.

With this set up the member has no way to access any information on the PC or perform any function other than use the class entry module.

Operation with no keyboard

The regular keyboard and mouse can be removed altogether once the system is set up. The CE program should be added to the start menu so the system can be shut down and restarted returning ready for use.

If the system is being used over a network then a remote desktop tool such as VNC can be used to perform all operations on the PC that may be required remotely. However very little need be done as the main Club Administrator module will link to this across the network to transfer information. If file transfer method is being used then this can also be done with no additional hardware. After the instructor password is entered you can press zero “0” to shut down the class entry screen. Then turn the num lock on the numeric keypad on so the arrow keys can be used to navigate the options on the CE menu, including importing and exporting data.

Trouble Shooting

Link Failure

This error indicates that one or more of the tables required for running the application could not be located. This may occur on start up when the application automatically checks for the tables required or when trying to link to them when using the Open Database screen. You should use the open database screen to locate the data file containing all the required tables. If this continues to occur you should reinstall the Club Administrator application and try again (caution do not replace the Club.MDB file or your data will be lost, always ensure you back this file up before reinstalling). If problem persists contact Full Contact Software for assistance.

Date Errors

If you find that you cannot enter dates in the format you want then go into “My Computer”, “Control Panel” and “Regional Settings”. Click on the Date tab. Then alter to required format. There is a ‘Bug’ with some versions of the windows operating system where New Zealand date formates cause errors, it is not clear why this is but switching to Australian format (which appears the same) resolves the problem.

Wrong Age

If entering member’s birthdays you should keep in mind that for those over 70 you might need to specify their birth date in 01-01-1930 format not 01-01-30 to avoid this being misinterpreted as 2030.

Classes not added

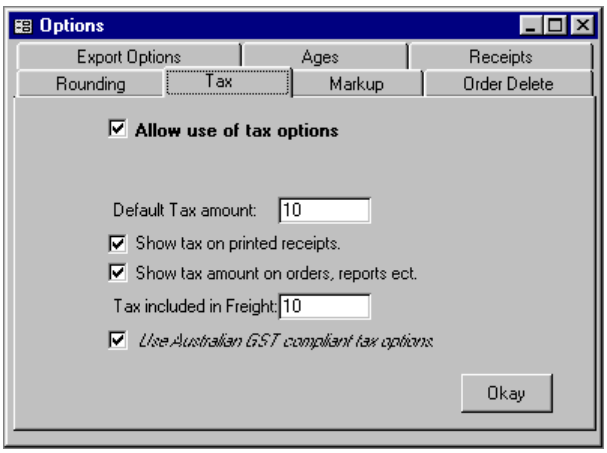
If a member has been entered for a class but then when you look at their attendance record it is not added to their current classes you should check their grading date. It is possible that they have had the wrong date entered for their grading date and so classes are being recorded as before it. Note: if a member attends class on the same day as their grading date this class will not be counted.

Another possible cause is where the class entry function is being used on a separate computer and the date formats on the two are not the same errors can occur in the transfer of data.

TAX COMPONENT

The tax options included are designed to allow you to add a percentage to cost prices at purchase. Then also add a percentage at sale time.

Options



Show tax on printed receipts: tax amount is displayed on receipts.

Show tax amount on orders, reports etc.: select this option to display tax in other places.

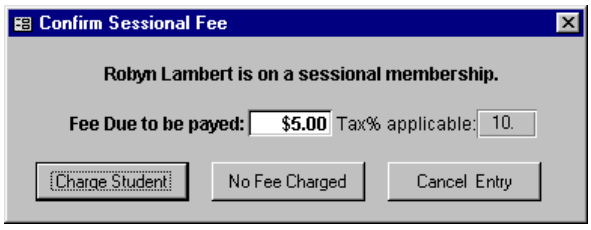
Tax included in Freight: Tax on freight will be included as a set amount.

Use Australian GST compliant tax options: this changes the format of Receipts to make them acceptable as Tax Invoices under Australian Goods and Services Tax law.

Default Tax amount: this amount is the percentage that appears when first creating membership types, items, for grading fees etc.

Sessional Fee Payments

If you are using sessional memberships you should include any tax amount that is to be paid in the membership screen and this and the tax percentage entered there will be picked up.



Membership Fees

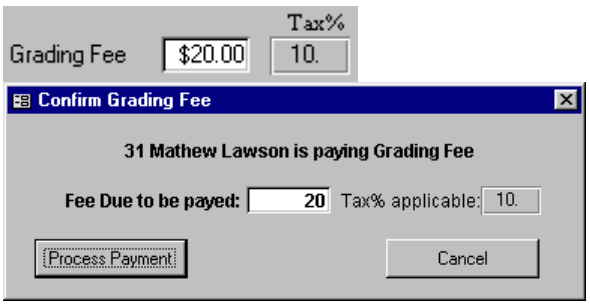
A tax amount is enterable for annual fees and training fees in the Membership types screen. This amount will be recorded whenever fees are paid.
Note: you should include tax amount to be paid in fee amount. So if for instance you have a fee of $50 and have to collect 10% tax you should enter $55 as the fee and 10% for the tax amount.

Affiliation Fees

On the options tab of the Affiliation fees screen will appear the **Percentage Tax on Affiliation Fees** entry box. Here you should enter the amount of tax to be applied to affiliation fees. This amount will be applied when affiliation fees are received.

Grading Fees

In the Promote member screen the default Tax amount appears. This can be altered before entering the amount being received if required. In the Members Grading Dates screen when you receive payment then the default tax amount is also picked up. This can be altered before you process payment if required.



Items

There are two taxes associated with Merchandise: an amount payable when purchasing goods and an amount to be charged when selling the goods.
There are two costs listed when the tax option is in use, the first is the cost to buy the goods. To this is applied the tax percentage to give the actual cost that is paid, which includes the tax amount entered. For Sell price the same occurs, the sale price if tax was not included can be entered. Then the tax percentage and the actual sale price are calculated from these.

	Before Tax	% Tax	Actual
Cost	$50.00	10.00	$55.00
Sell	$80.00	10.00	$88.00

Orders

When an item is selected to place on an order all the Cost and Sell, along with associated tax fields are available and can be altered from the order screen, in the same way as shown above. On the order the tax percentage is shown. If you wish to only alter the amount of tax payable for the order then you may do so on the order but you will also have to adjust the item price to remove any excess tax.

Printed Orders

For orders the tax percentage on items is included as a percentage.

Qty Units	*Tax%*	*Unit Cost*	*Total Cost*
3	10	$20.90	$62.70

Receipts

When printing receipts you have the option of including the tax component on these. If you select this option the receipt will appear in the following format:

Receipt

Seido Juku Karate Geelong
Dean Street
Belmont 3216
Ph. 5244 1499

Student 3 Malcolm Ayles **Receipt** 145 **Date** 21-Apr-00

Code	Description	Qty	Tax	Amount
107	Gi Pol/Cot White 5	2	10.	$79.20
114	Patch Arm	1	10.	$6.60
113	Patch Kanji	1	10.	$6.60
115	Addidas Long Glove Medium	1	10.	$44.00
18	Markdown	15%		-$20.46
19	Rounding			-$0.04
1	Annual Membership	366days	10.	$30.00
		Total	$13.26	**$145.90**

Issued: 13:41 Fri, 21-Apr-2000

You may notice that the markdown percentage or amount will be shown as a total markdown when a sale is processed, then any rounding that was applied is shown after this. The markdown is actually applied at item level though for calculation of tax. So in the above example the merchandise sold needs to have the amount shown reduced by 15% before the tax could be calculated at item level. Markdowns and rounding do not apply to Membership Fees so for these the tax shown will be a direct percentage of the fee amount listed.

If you also select the "Use Australian GST compliant tax Options" then the receipt will appear:

TAX INVOICE

Seido Juku Karate Geelong
Dean Street
Belmont 3216
Ph. 5244 1499
ABN 123-456-789-029

Student 3 Malcolm Ayles **Receipt** 145 **Date** 21-Apr-00

Code	Description	Qty	GST %	Amount
107	Gi Pol/Cot White 5	2	10.	$79.20
114	Patch Arm	1	10.	$6.60
113	Patch Kanji	1	10.	$6.60
115	Addidas Long Glove Medium	1	10.	$44.00
18	Markdown	15%		-$20.46
19	Rounding			-$0.04
1	Annual Membership	366days	10.	$30.00
		Total price including GST		**$145.90**
		GST included		**$13.26**

Issued: 13:13 Fri, 21-Apr-2000

The words TAX INVOICE will now appear at the top of the receipt. To include the ABN you should add this as the final line in the schools address details. The GST included at item level will be listed as a percentage. The Total price including GST will be listed along with the amount of GST that was included.

Reports

Income received report

Income Report

Seido Juku Karate Geelong

Type	Period	Category	Tax percentage	Tax Amount	Amount
Affiliation	Apr-2000	Affiliation Fee	0		$230.00
Total for type = Affiliation					*$230.00*
Fees	Apr-2000	Training Fee	10	$110.00	$1,210.00
Total for type = Fees				*$110.00*	*$1,210.00*
Purchase	Apr-2000	Sparring Gear	0		-$270.00
		Freight	10	-$4.09	-$45.00
		Gi	10	-$26.60	-$292.60
Total for type = Purchase				*-$30.69*	*-$607.60*
Sale	Apr-2000	Services	10	$20.00	$220.00
		Gi	10	$32.40	$356.40
		Sparring Gear	10	$16.00	$176.00
Total for type = Sale				*$68.40*	*$752.40*
		Total balance (no tax)			***-$40.00***
		Total balance with tax	*Tax payable*	***$147.71***	***$1,624.80***
		Total for report	***Tax payable***	***$147.71***	***$1,584.80***

This detail all amounts received and spent separating the tax component of each out for the period. In the report above for example one month has been reported on.
Affiliation Fees: in this report have 0 tax applied (they may be going overseas so not attract tax).
Fees: do attract tax, so this is calculated.
Purchases: There are purchases with and without tax. Items being imported or brought from tax exempt suppliers are kept separate provided that the correct tax levels are set up initially or at the time orders are raised.
Sales: All the sales listed attracted tax and so this has been applied.

The total tax pay for this report then totals to $147.71 this being the sum of all the tax collected minus the sum of all tax paid.

Sales Analysis

This report will separate out tax payable from cost of goods. In doing this it credits any credit gained from goods when tax is paid at time of purchase. Keep in mind that this report is designed to give a picture of sales and related profit / markdown trends. To do this it uses stock at cost value actual sales and the tax it takes from the current percentage for the selected item. As such altering tax percentages or item cost or sell price will alter the values presented on this report.

By using this option it does however give a clearer picture of the actual profit being gained from the sale of merchandise once markdowns and Tax commitments are taken into account.

April			4 month period totals		
Sales	Mark downs	Tax Profit	Sales	Mark downs	Tax Profit
6		$8	8		$11
$207	$31	**$73**	$273	$44	**$95**

Orders Completed

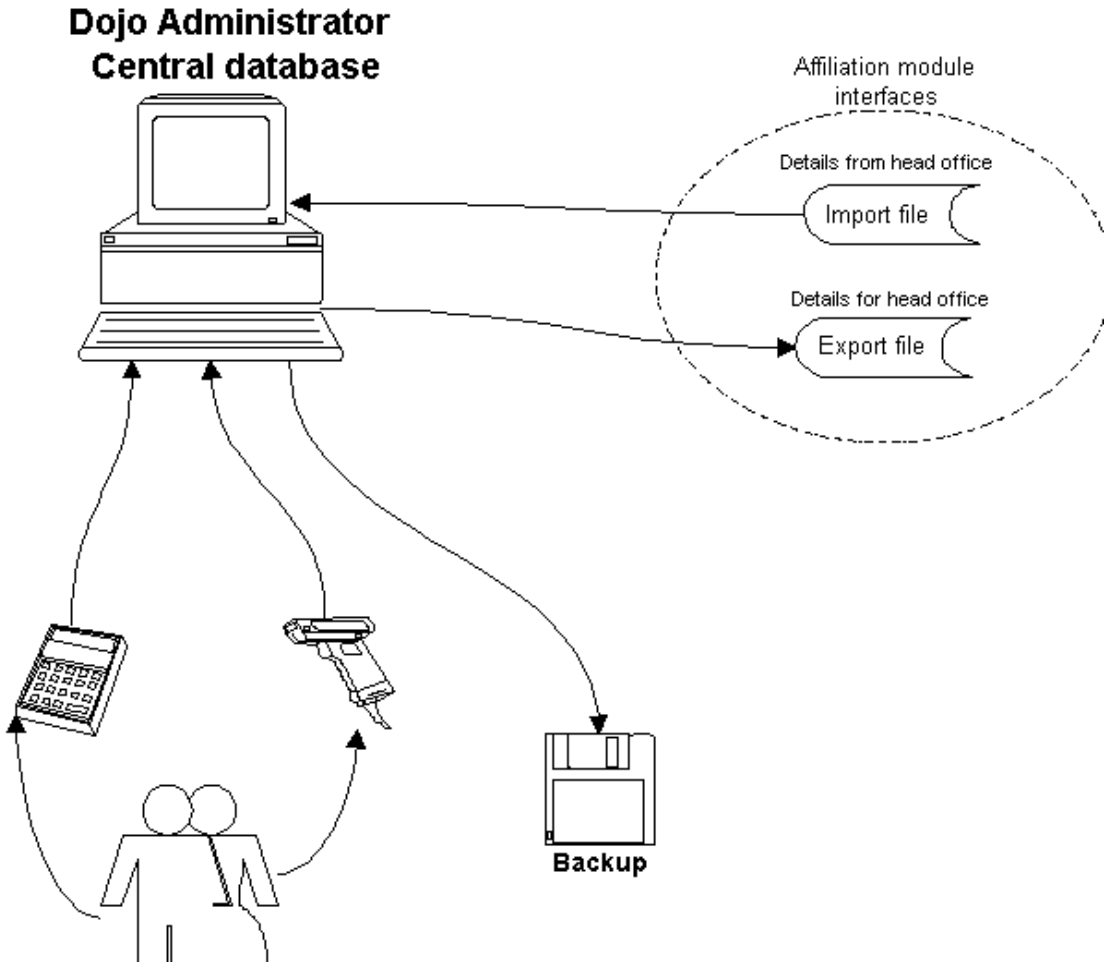
This report includes tax for both merchandise and freight combined.
The amount of tax paid in Freight is calculated at the time this report is run from the Freight Tax percentage entered in the options screen.

Received	Invoice	Freight	Invoiced	Tax
21-Apr-00	12314	$10.00	$62.70	$7.18
21-Apr-00	123	$7.00	$127.60	$13.40
	Total	$17.00	$190.30	$20.58
	Total Invoiced + Freight		$207.30	

APPENDIX A – Club Administrator Data flow

The following diagrams show the flow of data between the various Full Contact Software products. The affiliation module mentioned here has not yet been released, for further information on this component contact Full Contact Software.

Single PC set up (with Class Entry use)



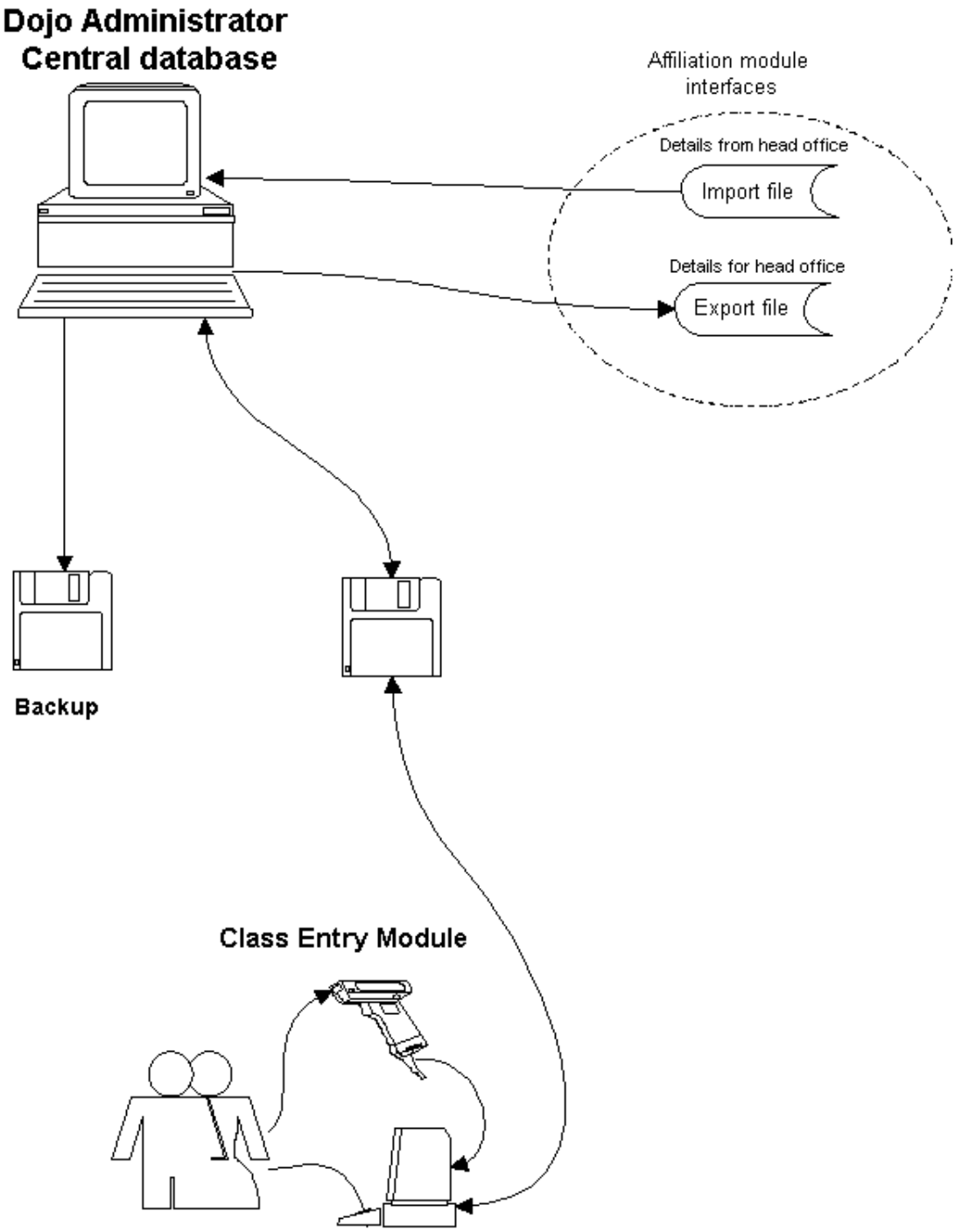
When you first install "Club Administrator" on your PC, you are ready to go. The above diagram shows the dataflow for the system.

The use of the direct member entry of classes is optional; it can be achieved in one of two ways on a single PC.

- Using the class entry screen of the Club Administrator. This provides input without any additional programs being installed direct into your database.
- Install the class entry module. If the Class Entry module is used in this situation then the Club Sync utility should be used to simplify the maintaining of data between the two modules. The Class Entry module provides additional features and will generally provide quicker response to the members when they are entering their classes.

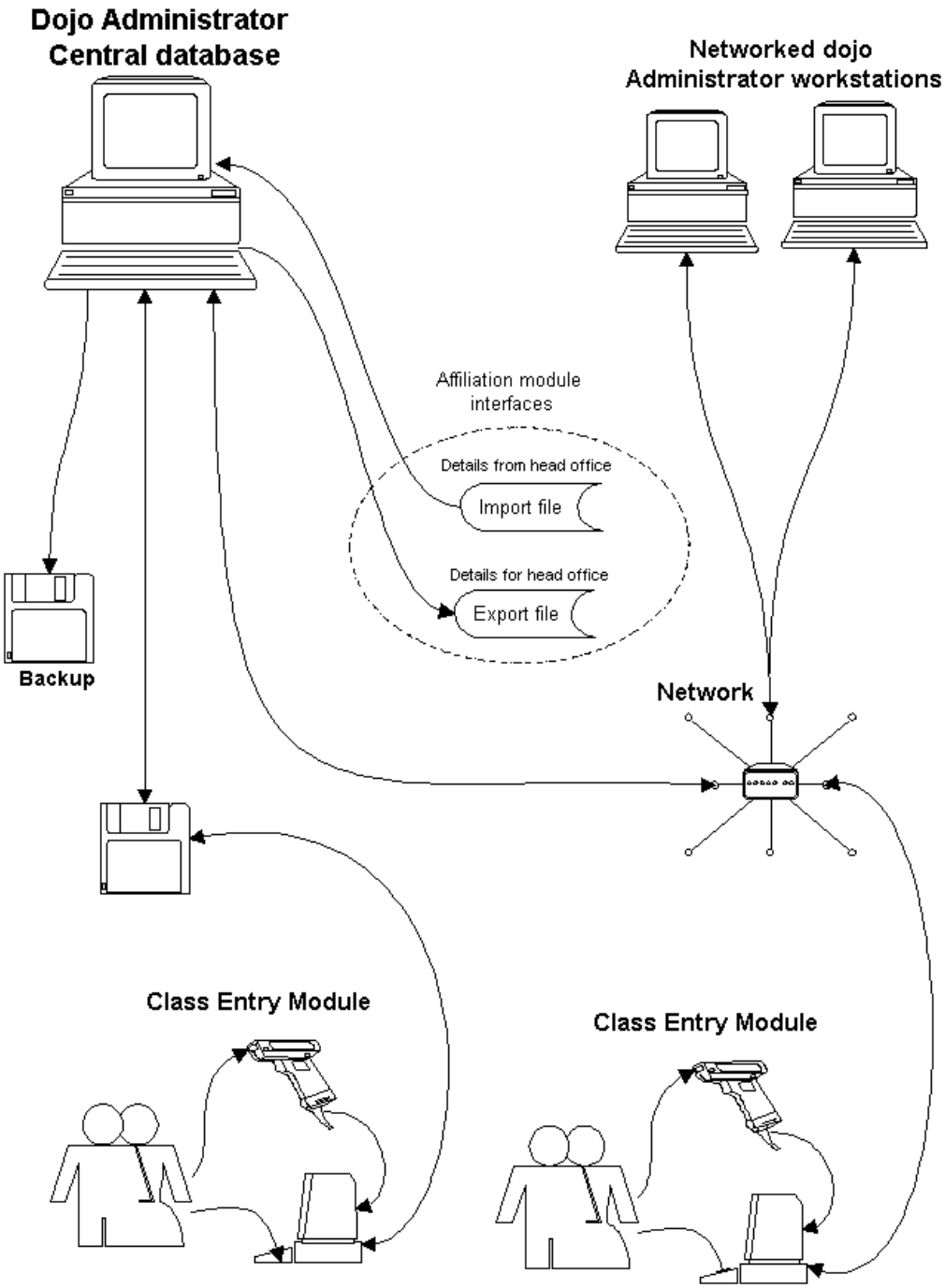
This set up will allow the capture of attendance data at time of members attending. When the PC is being used for entering of fees or other administrative work members will need to wait to enter their attendance however. This can be overcome by a dual PC set up (see following).

Dual PC setup.



In this set up the class entry module is running on a separate PC. This allows the adding of members, receiving of fees and other administrative functions to occur without stopping members entering classes. More than one PC can be used for Class Entry. All class entry computers must regularly be synchronised with the main module. If there is no networking available this will normally be done with the use of floppy disk transfer.

Networked environment set up.



If networking is available multiple copies of the Club Administrator can be run against the one database. In addition to this Class Entry modules can be connected via the network, this enables the use of Club sync utility to simplify keeping these up to date.

Class Entry modules not connected to the network can still be used.