ProSchool 3

Version 3.0

The Next Generation of School and Class Management Software

USER'S GUIDE

ProSchool

Version 3.0

The Next Generation of School and Class Management Software

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DOCUMENT CONVENTIONS USED IN THIS MANUAL

This ProSchool documentation assumes you have a working familiarity with personal computers in general, and of the operating conventions used in your version of Microsoft Windows. Therefore, it does not cover the basics such as keyboard and mouse operation. If you are unfamiliar with these basic personal computer and / or Windows conventions, please refer to your computer and / or Windows documentation.

This documentation uses the following conventions and descriptives to indicate keystroke syntax, commands, menus, titles, window components, references to other sections, and to emphasize important text:

- Keystrokes appear in bold face and **ALL CAPS**.
- Sequential keystrokes are separated by commas:

  TAB, **R**, **TAB**, **T**.

- Keys that are held down simultaneously where one is held down while the next is struck, such as combination ALT and CTRL functions, are separated by the “+” sign:

  ALT + **U**, or **CTRL** + **X**.

- Keys that are held down together simultaneously while a third key is struck, such as combination CTRL and SHIFT held together before P is struck, are indicated by the “ / ” and “+” signs:

  CTRL/SHIFT + **P**.

- Button labels, menu titles and menu options appear just as they do on your screen—case-specific, bold faced and with one letter underlined:

  <u>M</u>ain, **<u>B</u>illing** (etc.).

- Titles for windows, windows sections and dialog boxes also appear as they do on screen:

  ProSchool Configuration, **Code:** (etc.).

- *Hints, Tips and other handy time savers are italicized.*
- Emphasis is indicated by *italicizing* or <u>underlining</u> appropriate words.
- Data is shown in quote marks and a sans serif typeface, as it appears on screen:

  “August”, “42.50”, “SH20”.

- The terms “Family” and “Student” are always capitalized, since these entities are the key elements in ProSchool.
- This documentation uses a narrative style that explains the task first, then how to accomplish it. The instructions typically begin with a keyboard / mouse graphic:

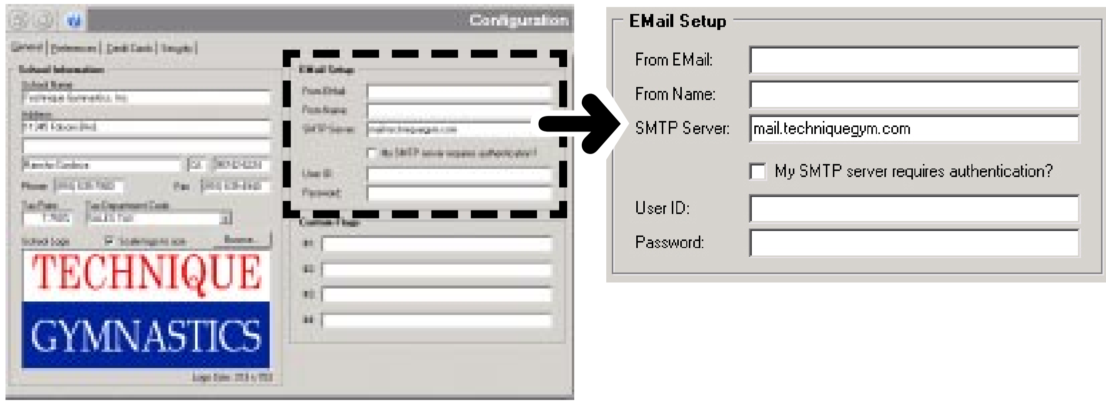
   **To do thus and such:**

  If you have sufficient grasp of a particular operation and wish to “cut to the chase”, just look for the above symbol.

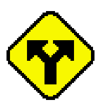
Beginnings

–continued–

- The term “window” refers to the immediate (“active”) window you are working in (below, left); the term “section” refers to a specific area within a given window (below, right).



- Occasionally, a series of instructions brings you to a “fork in the road”. Your choices are presented to you like this:



- To complete the process of entering billing based charges that are based on previous charges, **go directly to step #11**;
- To configure new billing based charges based on a Client’s account balance, **continue to step #9**.

- When a step uses a function or specific window that was covered in a *previous* section of the manual, the “nugget” graphic appears with the specific reference. A directory tree metaphor is used to indicate the section and subsection:

The **Search for a Class** window was explained previously in:

- **Using ProSchool’s Context-sensitive Search Function**
  - CONDUCTING SIMPLE SEARCHES IN PROSCHOOL

- When a step uses a function or specific window that was covered earlier in the same section, it is referenced in the text stream parenthetically (italicized here for emphasis):

  If you want to sort report results to a greater degree of specificity, click **Sort...** to open the **Report Sorting Options** window. *(The configuration of this window is discussed earlier in this section—see “Using the Sort Utility in ProSchool Reports”.)* Click **Change** to continue.

- You will frequently see significant amounts of white space at the bottom of a given page even when a section continues to the next page. This is necessary due to the size of the graphics. It is also done to prevent the division of a paragraph from the bottom of one page to the top of the next, and to prevent the separation of a graphic from its descriptive text. The benefit to you is more white space in which to make notes.

HARDWARE AND OPERATING SYSTEM REQUIREMENTS FOR PROSCHOOL

–continued–

To run the ProSchool software, you will need at minimum:

- A Pentium III IBM-compatible computer with at least 256MB of RAM;
- A CD-ROM drive;
- At least 40MB of hard disk storage available;
- Any printer supported by Microsoft Windows;
- Windows 98 operating system;
- 800 X 600 screen resolution (256 colors).

What we *recommend* for running ProSchool:

- A Pentium 4, 2 Gigahertz IBM-compatible computer with at least 512MB of RAM;
- 100MB of hard disk storage available;
- A CD-ROM drive;
- Windows XP operating system;
- 1,024 X 768 screen resolution (Hi-color).

For your operating system, you will need one of the following versions of Microsoft Windows:

- Windows 98 or ME;
- Windows 2000 or XP;
- Windows NT version 4.x (requires Service Pack 3 or higher).

This product supports multi-user (LAN) systems.

Beginnings

–continued–

If Questions or Problems Arise

The ProSchool software and its extensive help screens have been designed to be as user-friendly as possible. They should always be your *first* resort when a question or problem arises.

So if you have a question or problem, *please consult your online help or this manual first*. We have found that over 98 percent of our technical support calls are unnecessary because the problems could easily have been answered by consulting the online help or reading the manual first.

You can also send us e-mail about your question or problem at techsupp@aegroup.com.

For technical support by phone, we are normally available Monday through Friday from 9:00 a.m. to 5:00 p.m., Pacific Standard time. If you cannot find the answer in the online help or in this manual, call us at (916) 852-2900 and we will be happy to help you solve your *software*-related problem. If yours is a hardware-related problem, however, please consult your dealer. We are *not* equipped to handle general "...how do I get Windows running?"–type questions.

ProSchool's "Undocumented" Database Maintenance Tools

ProSchool's powerful database comes with a few tools used to diagnose and regenerate the database elements in the unlikely event they become corrupted. Note that these tools are designed for diagnostic use in the event you need to call Technical Support for assistance. This way, we can correct problems more efficiently and get you running again smoothly in less time (should the need arise). *These tools are not intended for use by the end-user;* that is why they are not documented in this users guide.

Beginnings

–continued–

GETTING PROSCHOOL LOADED AND CONFIGURED ON YOUR COMPUTER

To set up ProSchool in the Windows 98/Mellenium/XP or 2000/NT operating environment:

The installation of ProSchool 3.0 on your Windows PC is a straightforward and simple process, and should look reasonably familiar to anyone who has installed and used Windows software. If your computer's configuration is fairly typical, you'll find that it will be easiest and quickest if you use the installation defaults. On the other hand, if you are a more experienced user, you may want to customize the installation settings as you go through the installation process.

1. Make sure all other applications are closed before installing ProSchool.

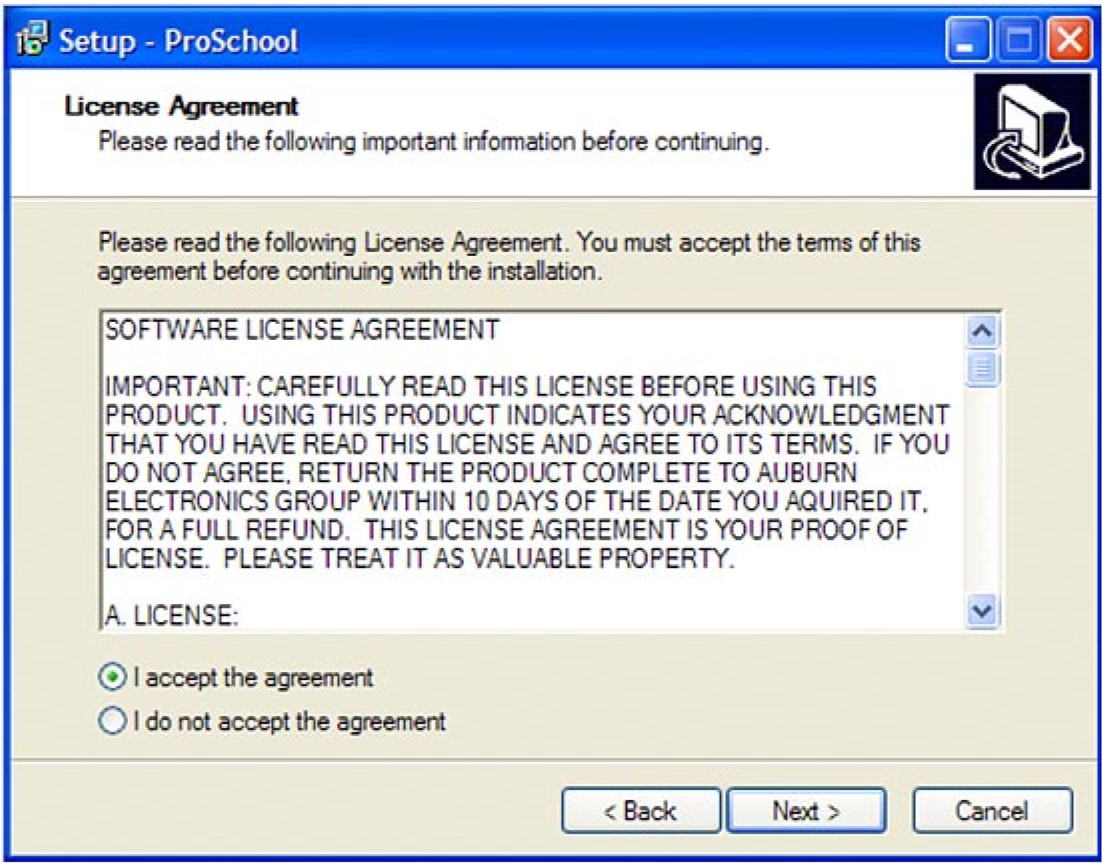
2. Insert the ProSchool program CD into your CD-ROM drive. If you have "auto insert notification" selected in your Windows configuration, the ProSchool installation process will start the Setup Wizard automatically. If the Setup Wizard does not start automatically, you can start it by clicking on the **Start** menu and choosing **Run**. Enter **"d:\setup.exe"** in the **Open:** field where **d:** is the drive letter of your CD-ROM drive.

3. Click **Next >** to continue the installation.

Beginnings

–continued–

Next, the license agreement will appear:

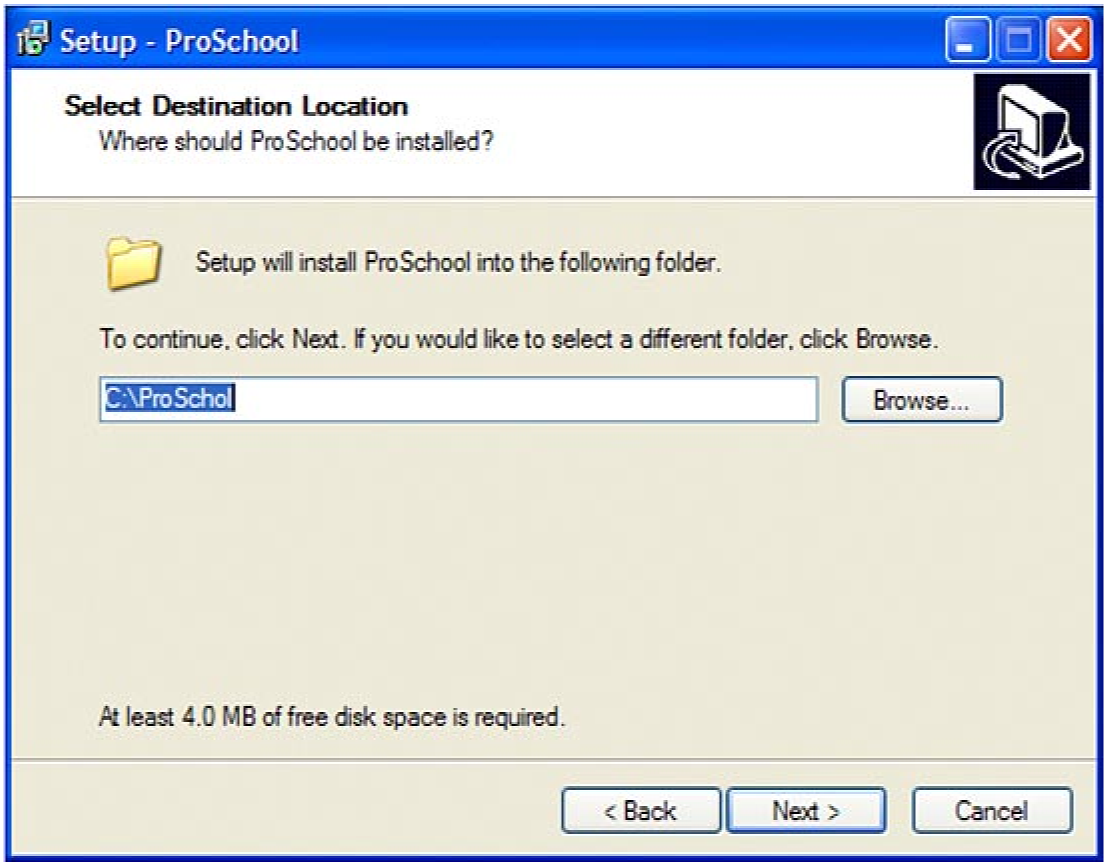


4. Choose to accept the license agreement, then click **Next >** to continue.

Beginnings

–continued–

Next, the installer program will ask you for the destination location:



5. Select the folder to install ProSchool into. By default, the installer will select the ProSchool folder on your primary hard drive (usually C:\ProSchol). If you are performing an upgrade from ProSchool 2.0 or already have ProSchool installed on your computer, you should click the **Browse** button and select the folder that ProSchool was previously installed into.

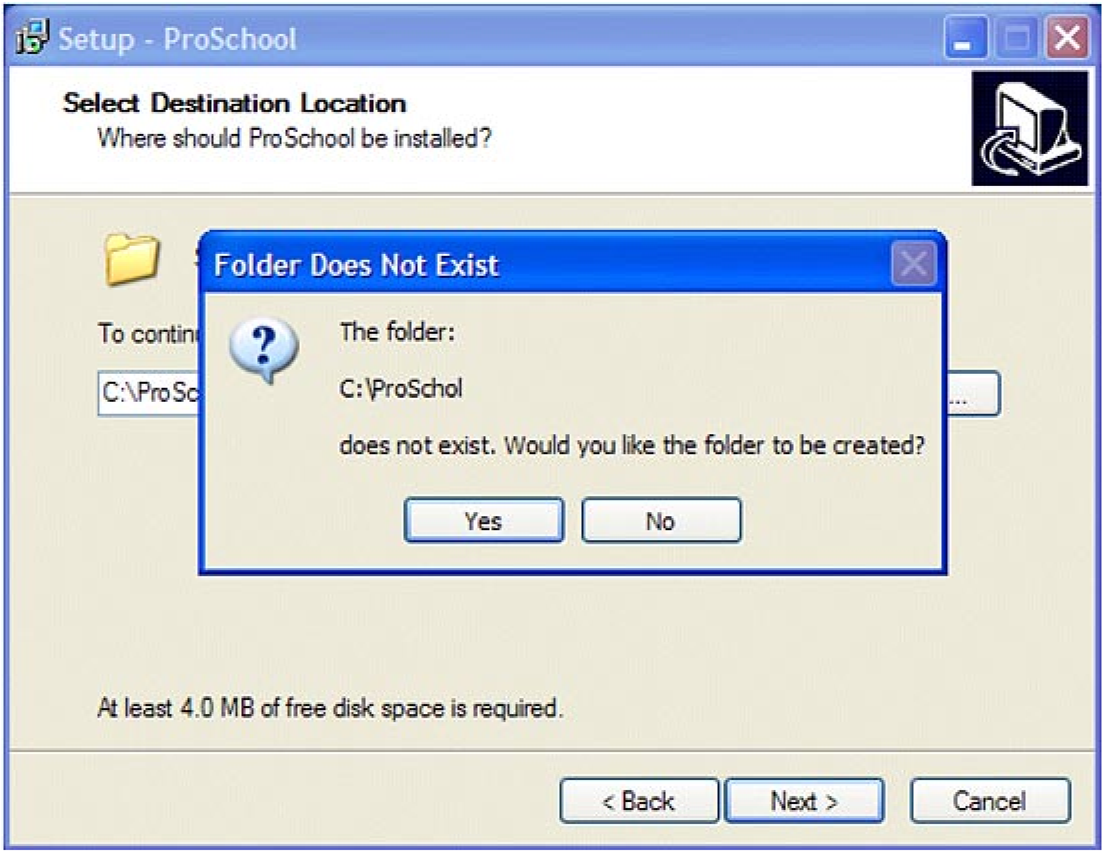
Note: Installing ProSchool "over the top" of an existing installation will NOT delete any data that might already be entered.

6. Click **Next >** to continue.

Beginnings

The installer will ask for confirmation of the destination folder:

–continued–

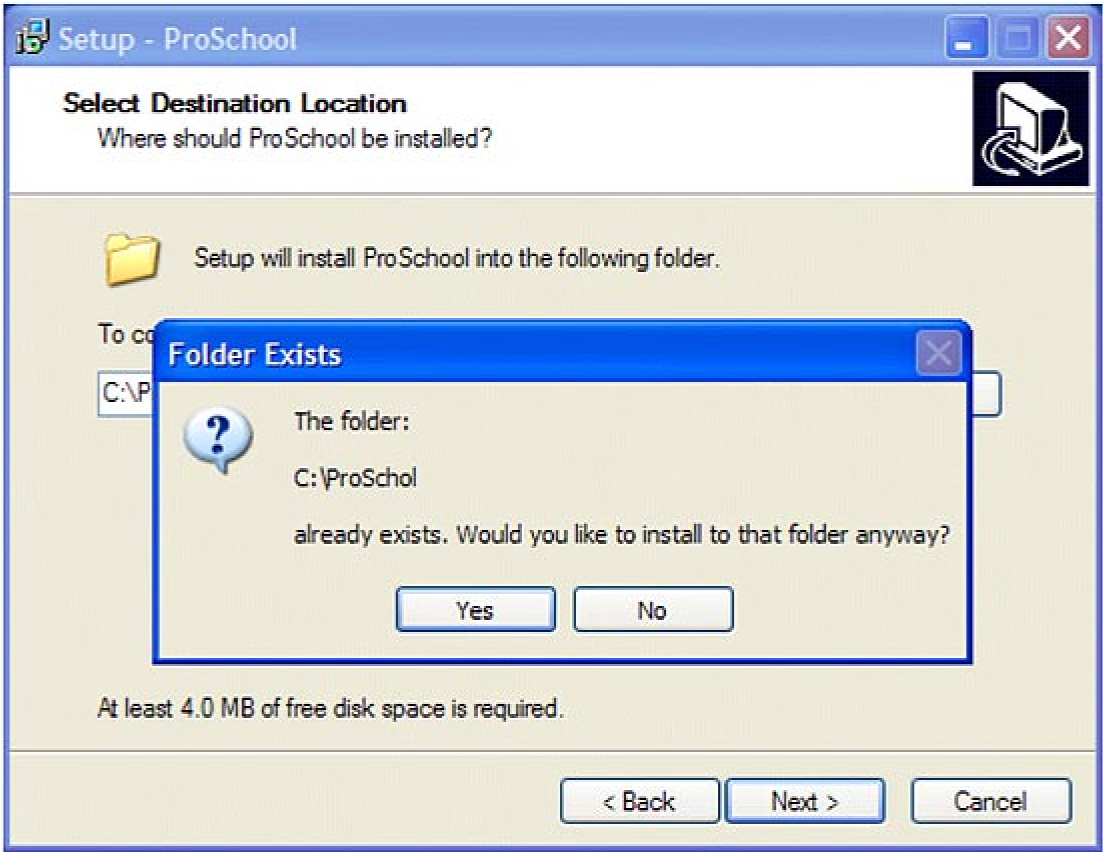


7. If the destination folder you specified does not exist, the installer will ask you if you want to create it anyway. In most configurations, the best answer is “Yes”; click it to continue.

Beginnings

–continued–

However, if the destination folder already exists, the installer will ask you to confirm that you want to install ProSchool to that folder:

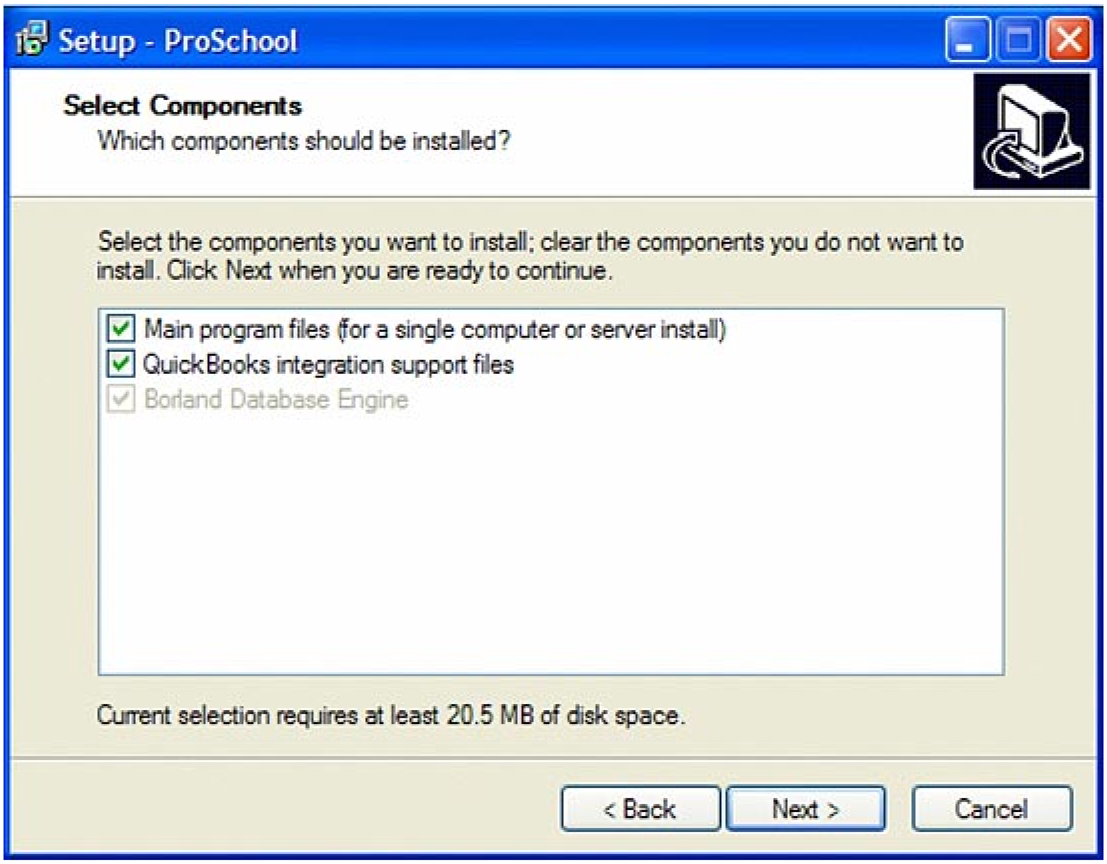


8. In most configurations, the best answer is “Yes” (as with the previous question). Click Yes to continue with the selected folder, or No to select a different folder.

Beginnings

–continued–

Next, the installer will ask you to select the ProSchool components you want to install.



9. Select as follows:

Main program files - SELECT this option if you're installing ProSchool for a single computer or the main computer for a network. UNSELECT this option if this is an installation for a client computer on a network.

QuickBooks support files - If you want this computer to be able to integrate with QuickBooks, select this option.

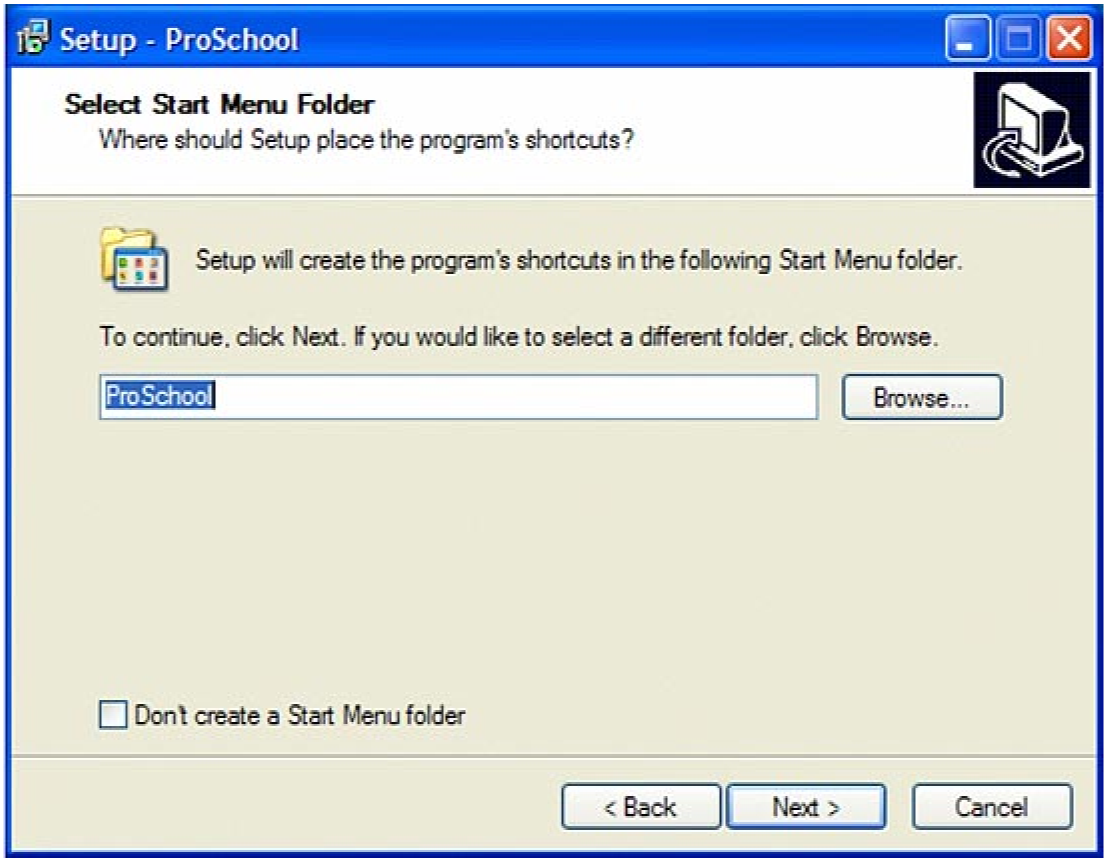
Borland Database Engine - Always selected.

10. Click **Next >** to continue.

Beginnings

–continued–

Next, select the name of the Start Menu folder to be used to hold the ProSchool program shortcuts.

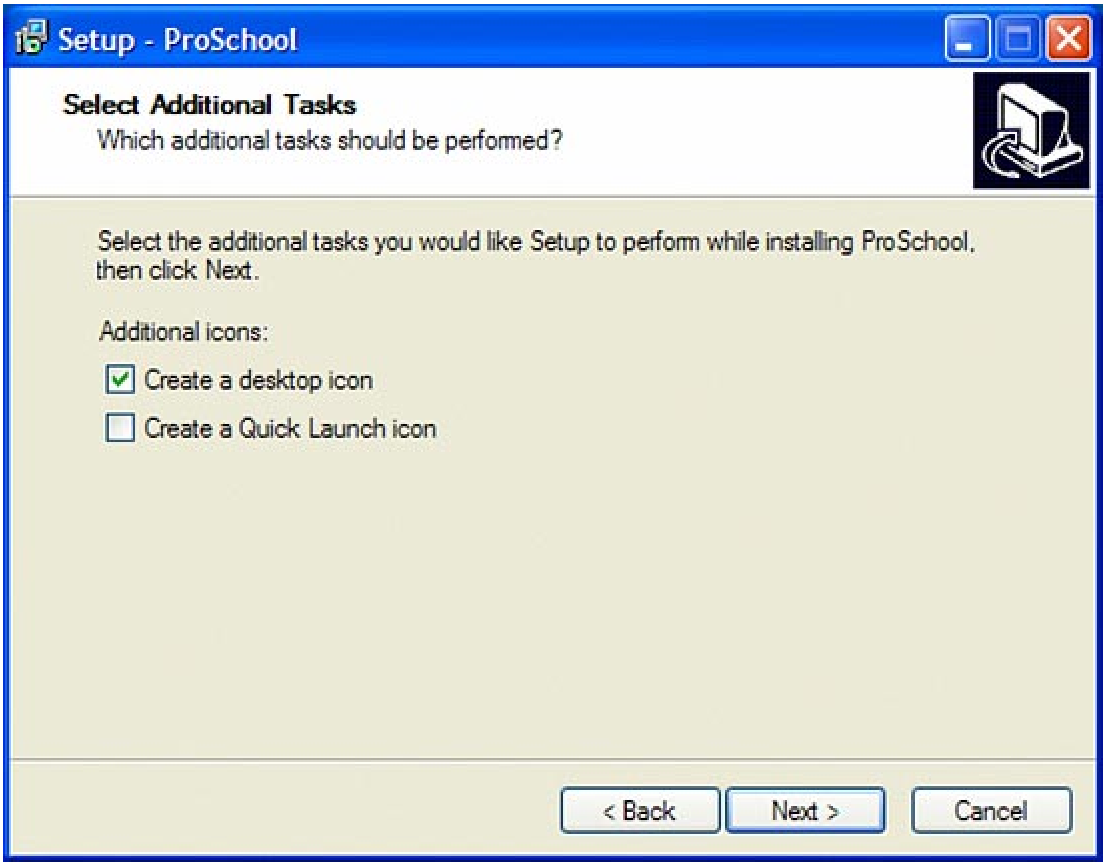


11. For most installations, the best response is to let the installer create a dedicated folder named “ProSchool”. Otherwise, enter a different name for the folder. Click **Next >** to continue.

Beginnings

Next, you can choose whether or not to have the installer create an icon on your Desktop and / or Quick Launch bar.

–continued–



12. Select the appropriate choices, and click **Next >** to continue.

Beginnings

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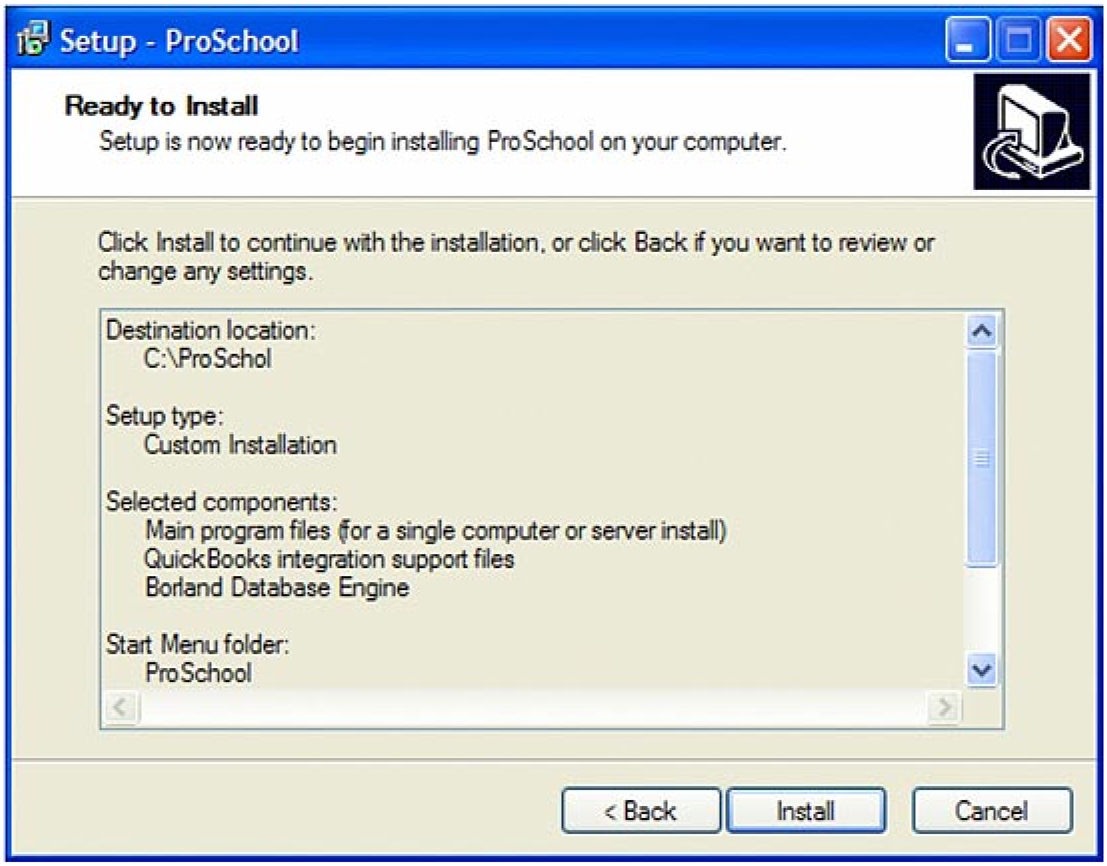
The installer is now ready to install ProSchool. Review your install settings and click **< Back** to make any changes before proceeding.

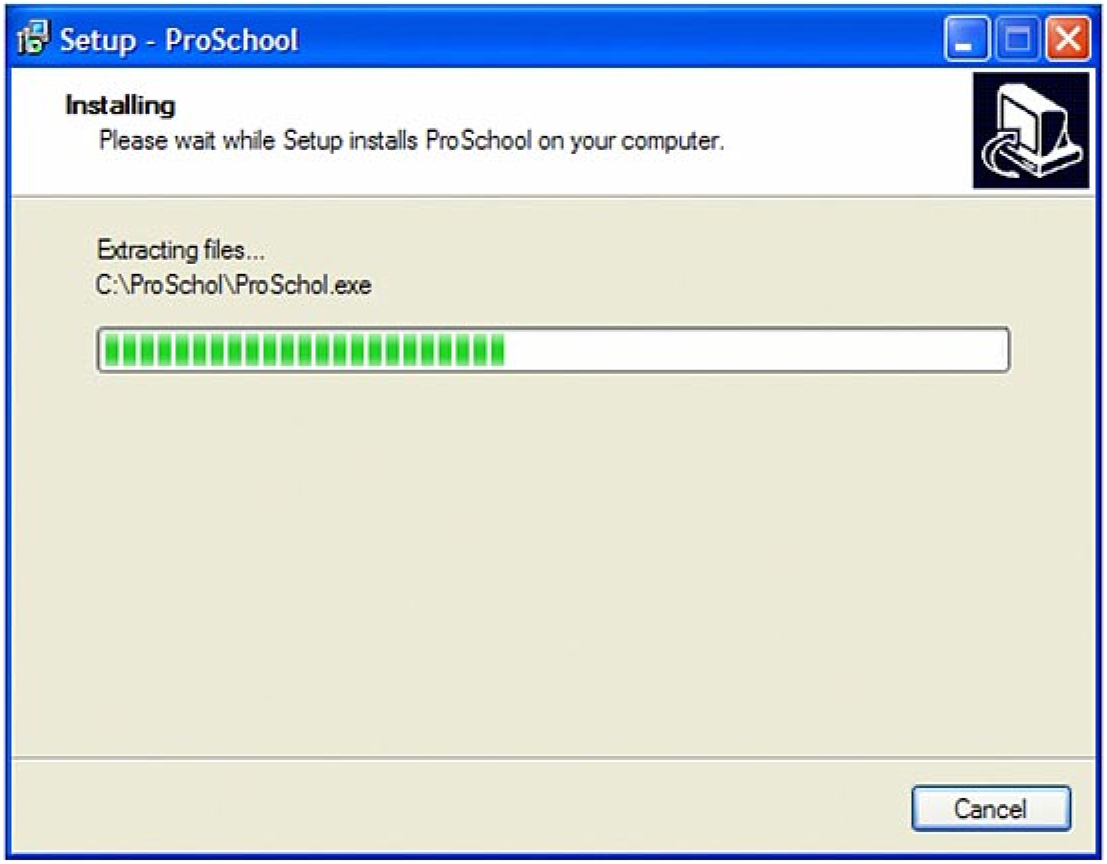


13. Click **Install** to continue.

Beginnings

–continued–

Setup will begin extracting all the files:



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Beginnings

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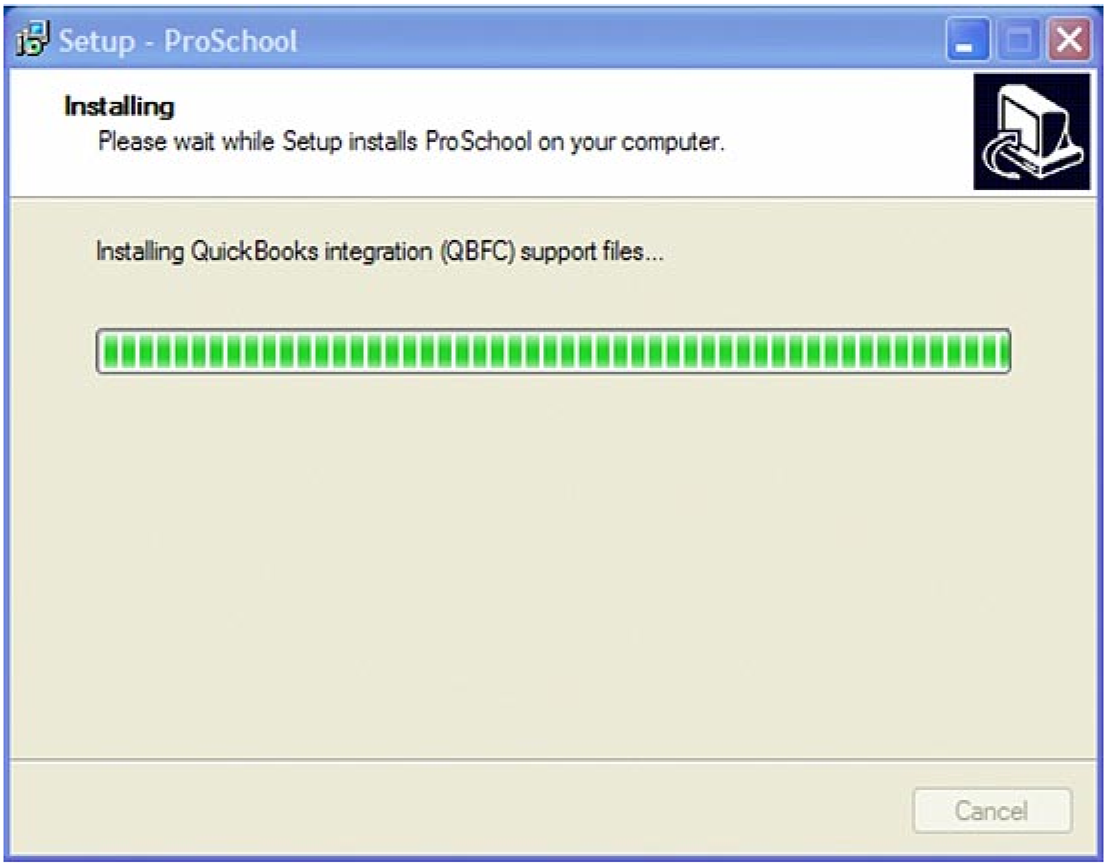
If you chose to install QuickBooks integration support, those files will be installed now:



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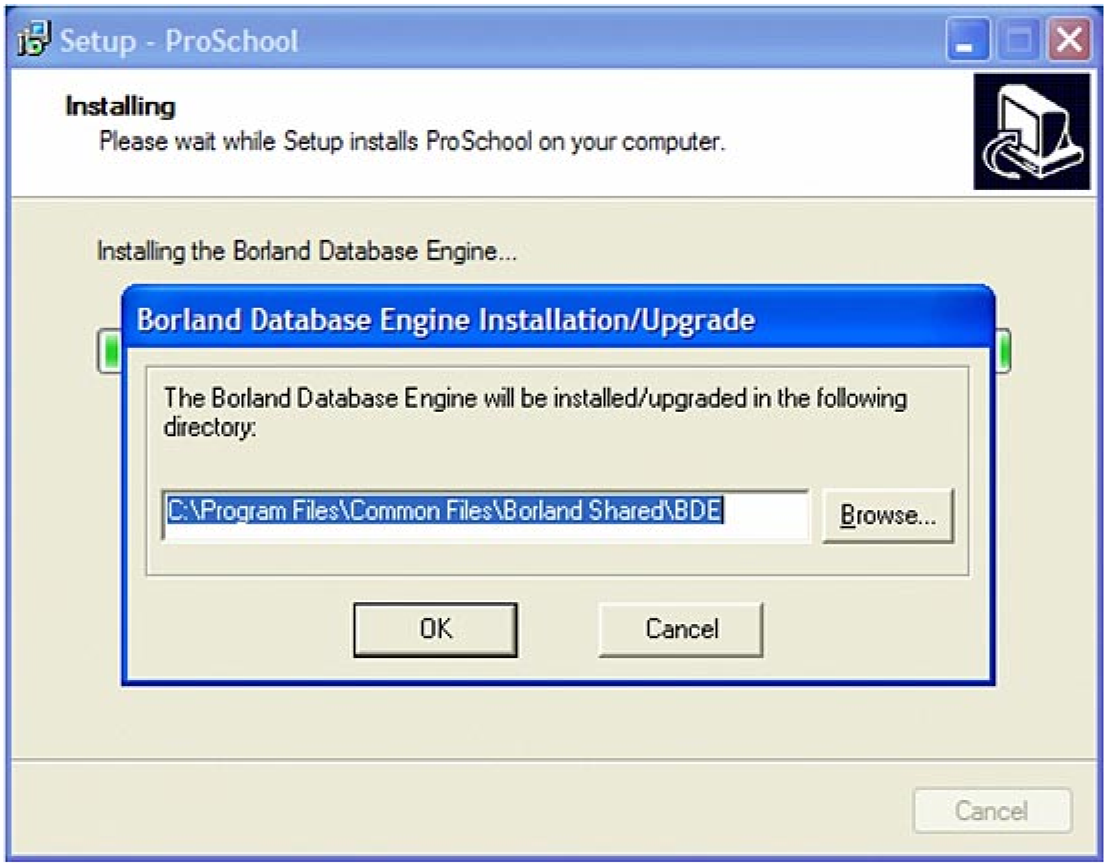
Beginnings

During the installation of the Borland Database Engine (BDE), you will be prompted to select the folder where the BDE should be installed:

–continued–



14. **Do not** change the provided path; just click OK to continue. Setup will now initialize the databases:

Beginnings

The ProSchool database files will be created or upgraded and any changes that are needed will be made. This process may take some time depending on how much data you currently have in the database.

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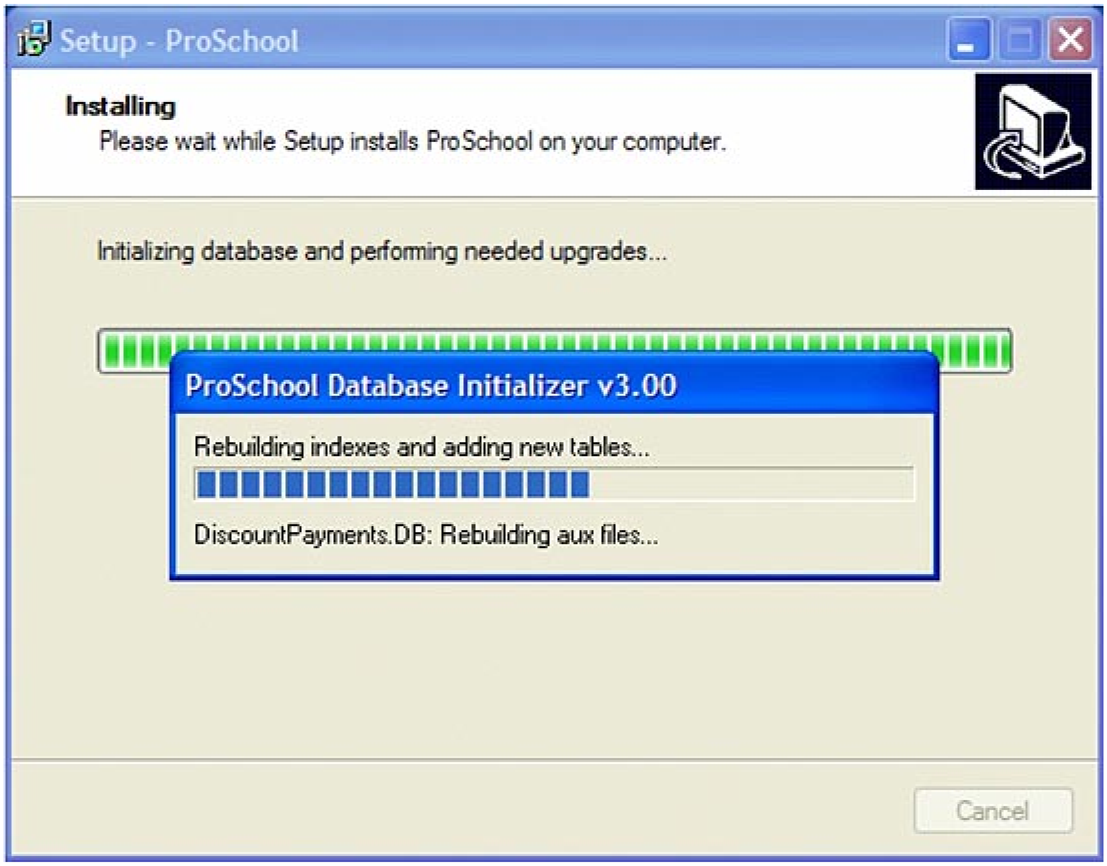


Beginnings

–continued–

Finally... the installation is complete!

15. Click **Finish** to continue.

Beginnings

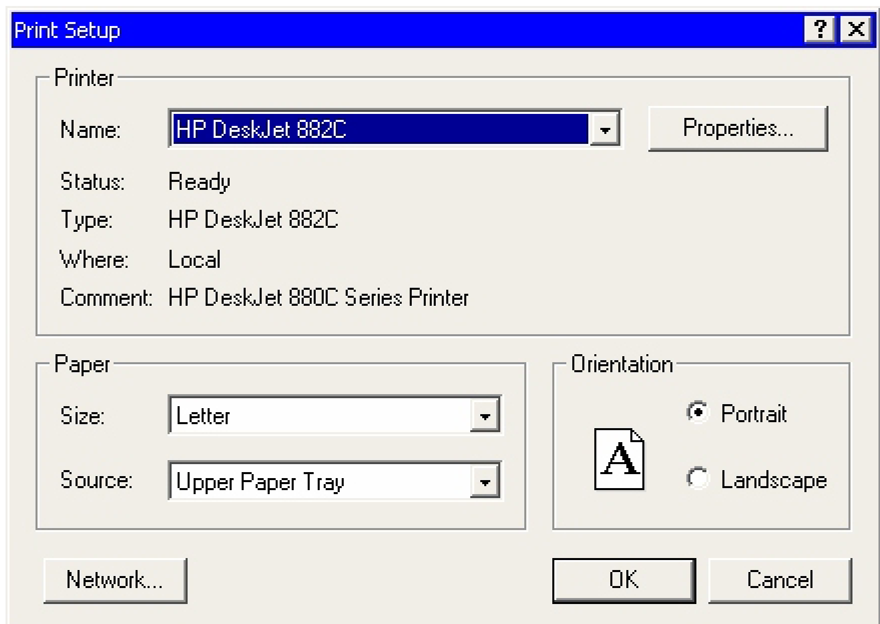
–continued–

Configuring Your Printer for ProSchool

ProSchool's report and label printing facilities can be implemented on all popular printers. If you are installing ProSchool on an existing computer system, your printer setup will probably not require any further setup procedure. If it does, or if you want to change the print options, it is very simple to do so.

To set up your printer for printing ProSchool reports and labels:

1. Start ProSchool. On the main menu bar, click on the **Main** pull-down menu. Select **Print Setup...** to open the **Print Setup** window:



2. If you are installing ProSchool on an existing computer system, **Default Printer** will be selected with your printer's name (or printer type) listed. If this is correct, go directly to step #3. If not, and you want to select a specific printer other than the default printer, click on the down arrow at the right of the **Name:** field to open the pull-down menu. Select the printer of your choice.

3. Select **Portrait** or **Landscape** depending on the orientation of the report you are trying to print. This setting automatically defaults to **Portrait** orientation every time ProSchool is started (regardless of the setting during the previous session).

4. In the **Paper** section, select the appropriate paper size. Click on the down arrow at the right of the **Size:** field to open the pull-down menu listing all available choices (your options here will depend on the type of printer you have; the default is typically **Letter 8 1/2 x 11**). Then, choose the appropriate paper source (feed) option. Click on the down arrow at the right of the **Source:** field to open the pull-down menu and select the paper source (feed) option. (This too will depend on the type of printer you have.)

5. Click **Properties...** to open the **Document Properties** window. All options available to your specific printer will be configurable (Layout, Paper / Quality, etc.). You are probably already familiar with your printer's capabilities; if not, please refer to the manual that came with your printer.

Beginnings

–continued–

INTRODUCTION

ProSchool 3.0 is an intuitive, easy-to-use Windows-based class management software solution for sports, skills and trades teaching environments. It is also powerful; the number of Clients, Students and classes are limited only by the computer on which ProSchool is used.

ProSchool is flexible as well. It can be configured for a variety of non-graded training environments and can accommodate group classes and individual one-on-one lessons simultaneously—and that's just the start.

Parameters such as class size, days-of-the-week offered, gender (male / female / coed), age range of Students and more are completely variable. Waiting lists for over-enrolled classes can be monitored. Just about any relevant parameter can be established or changed independently of others to suit the user in a wide range of environments.

ProSchool's powerful tracking, billing and report generating tools keep any training endeavor on track and organized. With a minimum of maintenance input, you're only a few clicks away from knowing who's enrolled, what classes they're enrolled in, when those classes are held, what a Client's account status is and much more.

Tuition periods can be configured by month, week, day or session—and you can establish as many different tuition levels as you like. Tuition discounts can be configured based on number of classes taken, "similar" classes taken (any classes with the same tuition code), number of hours enrolled, multiple Students enrolled by a single Client, sibling enrollments, and so on.

Numerous report titles keep you current and well informed. For example, Class Summary reports alone are available in seven different styles (by Code, Level, Location, Manager, Teacher, Tuition, and Type). Numerous other reports detail the status of your Client accounts (charge, billing, payment, aging), in addition to drops, referrals and much more. With ProSchool, there is no guessing where you are—you'll know in less time with more detail!

Perhaps most importantly, ProSchool mixes all these variables—as many as you like—without boxing you in to a given set of parameters for your school. Even the screen size of each window you use—and resize—is remembered to maintain a consistent user interface from one session to the next. To say that ProSchool is highly configurable to your school's needs is an understatement!

ProSchool also allows you to link seamlessly with QuickBooks to make your school's accounting easier than ever, and less time-consuming. This functionality works for QuickBooks 2003 or newer ("Pro" or "Premium" versions).

As with any powerful and highly customizable piece of software, a successful and effective ProSchool setup for your school will take some pre-planning on your part. Please give thoughtful attention to the section entitled, "Preparing to Configure ProSchool to <u>Your</u> School". It explains the preparation necessary, and data required, to build a solid foundation for *your* ProSchool configuration.

Thank you for purchasing ProSchool. We are confident you will find its power and flexibility a winner for meeting the organizational needs of *your* school.

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AN OVERVIEW OF KEY TERMS USED IN PROSCHOOL

ProSchool's input hierarchy starts with the *school configuration*—information on your school's identity.

–continued–

Next, you set up the various *codes*—abbreviated designations that allow great flexibility in organizing your school's Client, Student and class database. In ProSchool, codes are used to identify class types, class levels, tuition rates, locations, teachers, hourly and by-student rate scales, teachers and managers, referrals, and drop reasons. Some codes are required while others are optional. (It is for this reason that the codes are configured before the Clients, Students and classes are entered.)

After configuring your codes, you are ready to enter your *Clients*—the parent(s) or guardian responsible for the Student and tuition or fee payments. In the case of adult Students, the Client and Student would be the same.

Also, note that *active* Clients are those with at least one Student enrolled in a class; *inactive* Clients are those who do not have any Students currently enrolled in any classes.

Next, the *Students* are entered—anyone who attends and benefits from your school's instruction.

Now you're ready to enter the *classes* your school offers—loosely defined as any lesson in which skills are taught and learned.

On the financial side, first are *charges*—any administrative, bookkeeping or lesson-related fee(s) charged to the Client. *Payments* are any monies received from the Client to offset charges.

Each Client has their own *account*—a complete and detailed record of all charges and fees entered, payments made and the current balance.

If you use QuickBooks to manage your school finances, as many ProSchool users do, you will find that ProSchool's ability to link with QuickBooks will make your accounting tasks much easier than it would otherwise be.

Finally, numerous *reports* are available to help you summarize pertinent information, analyze statistics and trends, track class rolls and generate labels of all types.

Beginnings

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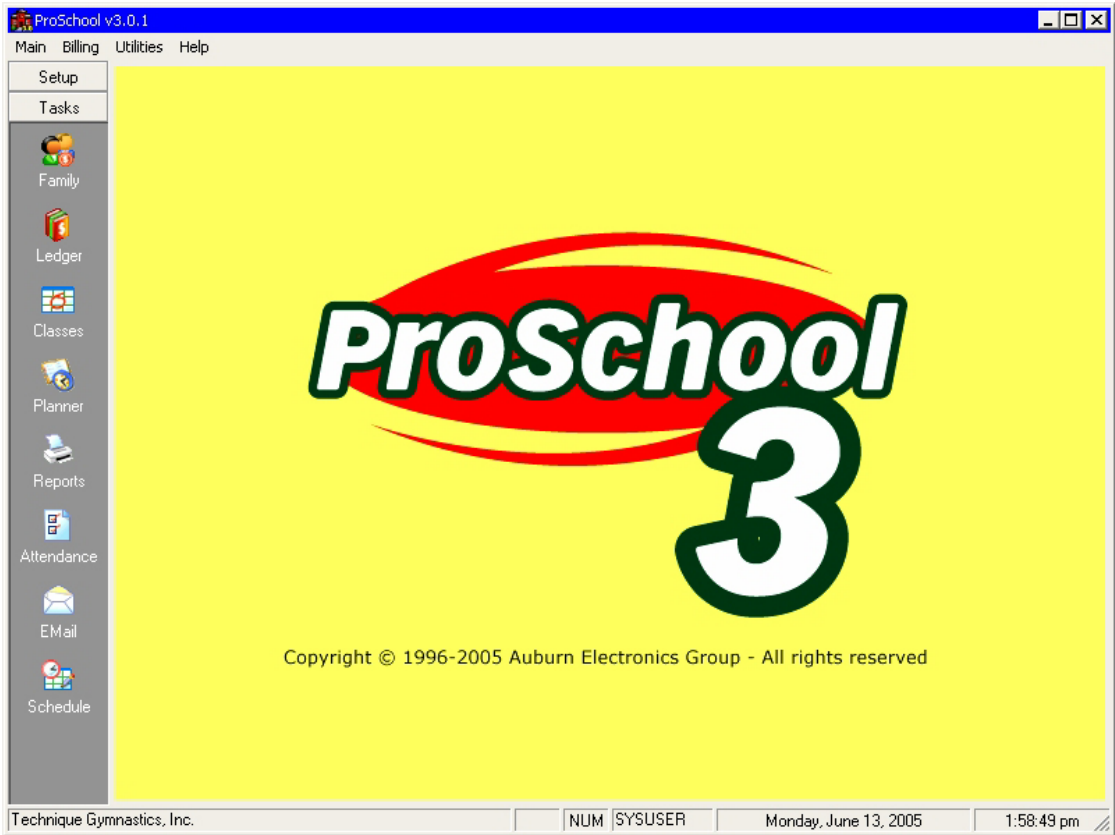
■ AN OVERVIEW OF THE PULL-DOWN MENUS

ProSchool's main window features four pull-down menus across the top and a vertical array of menu buttons along the left edge of the window:



It also displays your school's name (once configured), the current user (if security is enabled and user names have been assigned), and the time.

It is from this window that the ProSchool commands, menu choices and various input screens are called. The four pull-down menus contain the following commands:

Main	**Billing**	**Utilities**	**Help**
Print Setup...	Charge Entry ➤	Count Students	Contents
Exit	Payment Entry ➤	Enrollment Snapshots ➤	Search for Help On...
	Post Payments...	Reset Student Flags	How to Use Help
	Process Deposits/Transactions...	Database Maintenance ➤	About...
	Process Drop No Pays...	Backup/Restore...	
	Process Auto Pays...		Check for Update...

Beginnings

Each of the above pull-down menu actions is explained below:

Main

–continued–

Print Setup... ....for configuring your printer to accept ProSchool reports

Exit ....to exit the program (end your current session)

Billing

Charge Entry ➤ **Automatic** ....for fully automatic tuition calculation
Registration ....for Student registration and insurance charges
Class Based ....for charges based on the Students in a given class
Billing Based ....for creating charges based on previous charges (such as late fees, etc.)

Payment Entry ➤ **Quick Entry** ....for entry of Client payments
Apply Account Credit ....applies an account credit as a payment

Post Payments... ....a recap of all payments entered since last posting date

Process Deposits/Transactions ....to transfer deposits into QuickBooks

Process Drop No Pays ....drops Students from classes where their charges are unpaid

Process Auto Pays ....processes all payments for Clients configured for Auto Pay

Utilities

Count Students ....a utility that returns categorized or total Student counts

Enrollment Snapshots ➤ **Take snapshot** ....takes snapshot for a selected date
Maintain Snapshots ....view snapshot file or delete snapshots

Reset Student Flags ....for resetting or modifying Student flag data

Database Maintenance ➤ **Verify/Rebuild Tables** ....to verify and repair damaged tables
Check/Regenerate Indexes ....to check and / or regenerate all database indices
Reinitialize Database ....recreates indices and updates table structures
Database Explorer ....executes ad hoc SQL queries and browses tables
Active Users ....shows how many computers are currently running ProSchool

Backup/Restore... ....for backing up data and restoring previously backed-up data

Help

Contents ....a general overview of ProSchool’s online help

Search for Help On ....for finding help on a specific topic

How to Use Help ....guidance for using ProSchool’s online help

About... ....software ID, version, and memory and system resources indicators

Check for Update... ....to check online for updates to the ProSchool software

(The functions of the pull-down menus are covered in detail in the following sections.)

Beginnings

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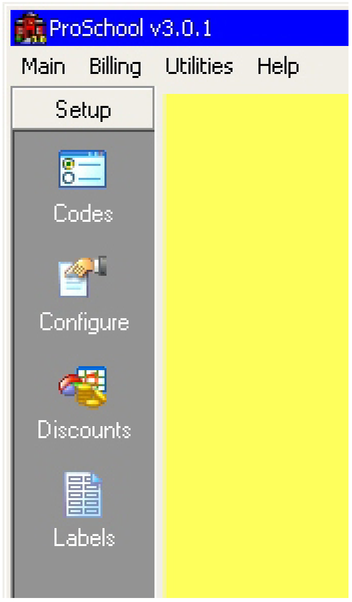
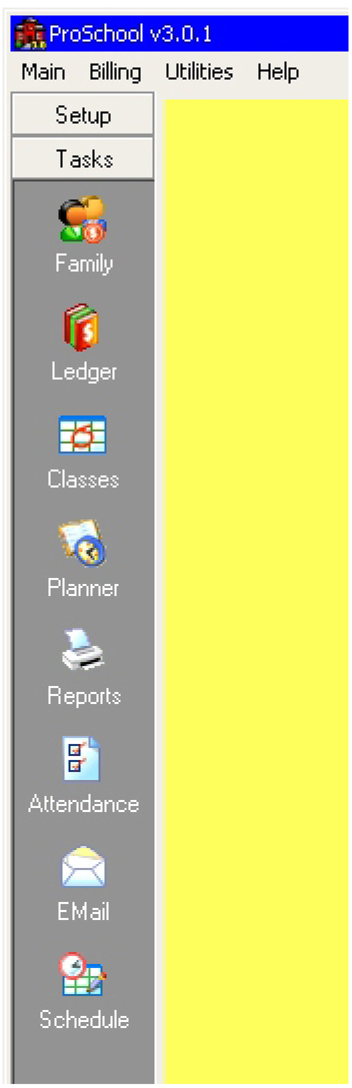




A Overview Of the Main Menu Buttons

ProSchool's menu buttons provide "one-click" access to all major and recurring tasks. They are located on the left of the main window.

There are two button groups to choose from, **Setup** and **Tasks**. The master **Setup** button (shown at upper left) reveals four buttons that are normally hidden since they're not typically accessed in day-to-day use of the ProSchool software. Click the **Setup** button to reveal the following:

- **Codes** allows you to define codes for every facet of your school's operation: Class types, class levels, locations, tuitions, rates, teachers and managers, billing categories, departments, label definitions, referrals, drop reasons, cities, skill levels, skill status and skill groups.
- **Configure** is where you define your school (name, location, logo, e-mail setup, etc.), program preferences and defaults, QuickBooks setup, credit card processing information, and security features (which limit access to various aspects of the program as defined by you).
- **Discounts** allows you to define the type and amount (dollar or percentage) of the discounts you wish to offer your Clients(monthly, session, weekly or sibling basis).
- **Labels** allows you to set the style, dimensions, font and font size for label printing

The master **Tasks** button (shown at left) reveals eight buttons commonly accessed to in day-to-day use of ProSchool. Click the **Tasks** button to reveal the following:

- **Family** allows you to add, review, update and delete Client (parent or guardian) and Student information (the sum total of which ProSchool refers to as a "family").
- **Ledger** shows account information for each family in your school. It is context sensitive; if the Jane Baker family is displayed in the family display and you then click the **Ledger** button, the ledger page will display the account detail for the Jane Baker family account.
- **Classes** allows you to add, review, update and delete classes.
- **Planner** is a useful scheduling and appointment calendar (for birthday parties, field trips, coach's privates, etc.).
- **Reports** allows you configure and print 30+ different types of reports covering every aspect of your school's operational metrics.
- **Attendance** allows you to track attendance by date and class, and results can be filtered for a variety of results.
- **EMail** allows you to send e-mails from within ProSchool to either a single Client, a subset, or all of them.
- **Schedule** allows you to view / print teacher and class schedules.

Beginnings

–continued–

■ USING PROSCHOOL'S INTELLIGENT DATE ENTRY AND POP-UP CALENDAR

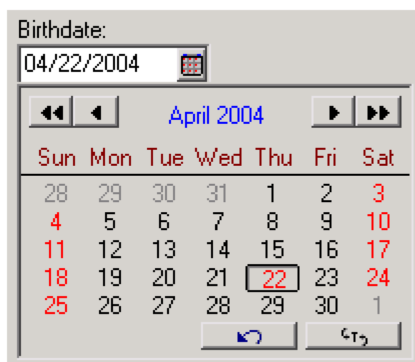
In ProSchool, numerous windows have date input fields such as this example from the **Student Information** window:

These "intelligent" date entry fields accept both numeric and text input. For example, you can enter the date in formats such as "9/5/96", "Sep 5 96", "s 5 96", and so on. ProSchool converts your input into the MM/DD/YYYY format as soon as you leave the date field by clicking on another field.

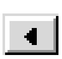
In addition, you can use the following shortcuts:

- entering "last" or "next" returns the date for this day *last* week or this day next week;
- entering "today", "yesterday" or "tomorrow" returns today's, yesterday's or tomorrow's date, respectively;
- entering "first", "second", "third" or "fourth" returns the date for the first, second, third or fourth occurrence of the current calendar day (for example, if today is a Tuesday, entering "second" returns the date for the second Tuesday of the current month).

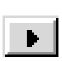
To open ProSchool's dynamic pop-up calendar, click  (to the right of the **Date:** field):

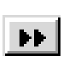


Click on the date you want or move to other dates instantly by clicking on the following buttons:

 – takes you back exactly one month (from April 22 back to March 22);

 – takes you back exactly one year (from April 22, 1999 back to April 22, 1998);

 – takes you forward a month (from April 22 to May 22);

 – takes you forward exactly one year (from April 22, 1999 to April 22, 2000);

 – returns you to the previous date, whether current or otherwise;

 – returns you to the current date (today).

Beginnings

Using Shortcut Keystrokes and Navigation Buttons

ProSchool offers several keyboard shortcuts for efficient navigation and input:

–continued–

Key	Action
F1	Displays context-sensitive help (same as clicking).
CONTROL + S	In **Client** and **Classes** screens, opens **Search** (same as clicking).
F2	In **Client** screen, opens **Find a Client** window (same as clicking).
F3	In **Client** screen, finds next Client (same as clicking).
TAB	Moves cursor to next data field.
INSERT	Insert a new record and clear data fields (same as clicking).
CONTROL + DELETE	Delete current record (same as clicking).
CONTROL + ENTER	Save changes to current record (same as clicking).
CONTROL + BACKSPACE	Cancel changes to current record (same as clicking).

In addition, there are many ProSchool windows that allow you to browse through the records in ProSchools many datasets (Students, Families, Classes, etc.) using the following navigation buttons:

- moves to the **first** record in the current dataset;

- moves to the **previous** record in the current dataset;

- moves to the **next** record in the current dataset;

- moves to the **last** record in the current dataset.

Beginnings

–continued–

PREPARING THE DATA YOU'LL NEED TO CONFIGURE PROSCHOOL

The best way to configure ProSchool to your school is to start with solid preparation. Most of the information below is self evident; the purpose of this section is to help you organize this information in the order in which you will input it into ProSchool.

The following list will guide you in gathering and organizing the necessary data:

- Name / address / phone numbers for your school, and your local sales tax rate.
- Class *types*, or subjects, taught by your school (tumbling, dance, etc.).
- Class *levels* (introductory, beginning, intermediate, advanced, pro, etc.).
- Class *locations*, if in addition to your main location (or multiple locations on one campus).
- Teachers and managers at your school (name / address / phone information).
- Referral sources (individuals, advertising, Yellow pages, sign, etc.).
- Drop reasons (all reasons used for dropping Students).
- Tuition levels (monthly, session, weekly, hourly, by-student).
- Rates charged for hourly and by-student tuition (there is detailed discussion on rate and fee codes in the section, "Understanding ProSchool Tuition Codes").
- Billing categories (Jan Tuition, Feb Tuition, session 1, late fees, pro shop, etc.).
- Class information (class name, start time, length, days offered, minimum / maximum Student age range, gender, maximum number of Students allowed).
- Income Departments (Tumbling, Girls Team, Preschool, etc.)
- Client data (name, address, phones for home / work / emergency contact, referral source, critical data such as family doctor info, notes—"medical release on file"— etc.).
- Student data (name, birth date, date registered, critical data i.e. medical alerts, health conditions, medical provider info, etc.).

Once you have gathered this information, you're ready to begin configuring ProSchool to your school!

Configuring ProSchool to *Your* School

OVERVIEW: CONFIGURING PROSCHOOL TO YOUR SCHOOL

Configuration of your school is easy and ProSchool makes data input highly intuitive as well. There are four areas in which you configure your school, represented by four sections in the **Configuration** panel:

- **General -** where your school's basic information is entered (name, address, tax rate, etc.), your school's logo, e-mail server info (so you can send e-mails from within ProSchool), and custom flags (known as "Student Flags" in the previous version of ProSchool, and which are covered later in the "Configuring Student Flags" section).
- **Preferences -** allows you to customize the "look and feel" of ProSchool to best suit you, and save you time.
- **Credit Cards -** If your school accepts credit card payments, this section is where you configure ProSchool with your merchant account, PinPad info, payment server's TCP/IP setting, and receipt printer setup info.
- **Security -** you can establish different access levels for different users, so that the more sensitive information is only accessible to you or the employees you trust with it.

Before you begin configuring your school, here's a helpful hint: In most name fields, ProSchool automatically capitalizes the first letter of each word entered.

Configuring ProSchool to *Your* School

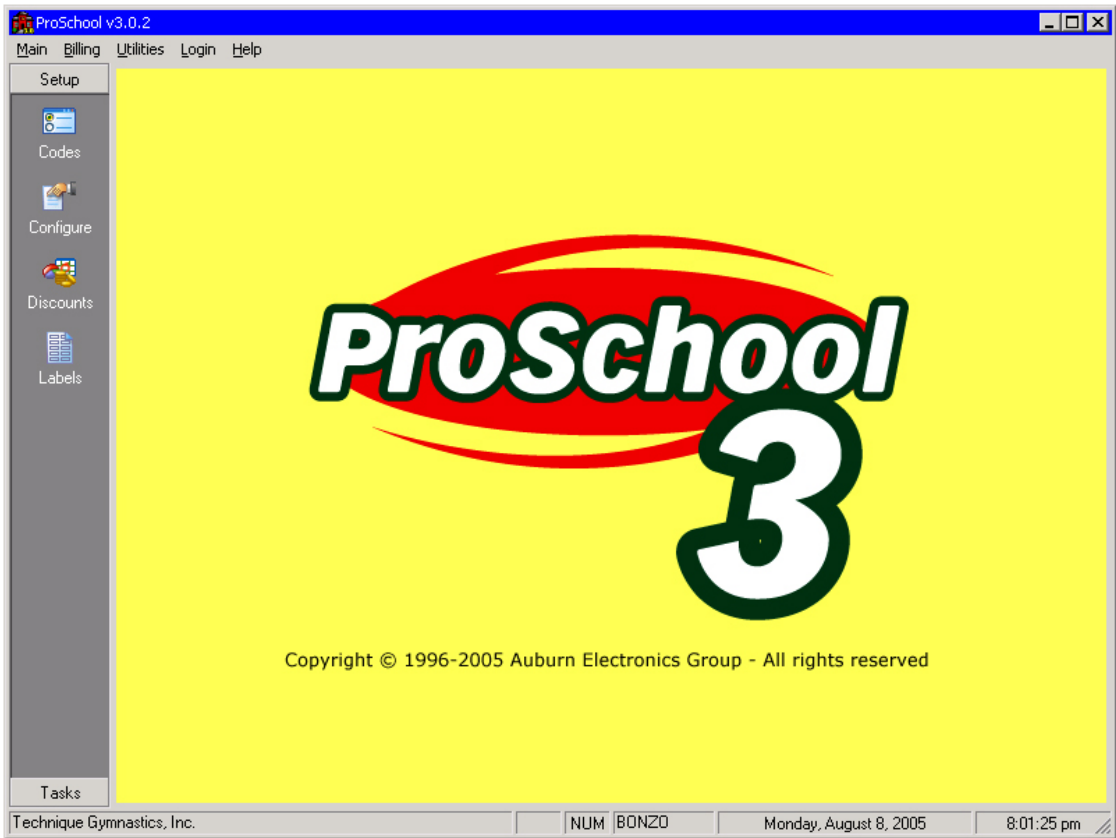
–continued–

■ DEFINE YOUR SCHOOL

The first step is to define your school's identity by entering information about your school.

To configure your school's identity in ProSchool:

1. Launch ProSchool (if you haven't already). Click **Setup** (located in the top of the vertical menu button bar on the left of the screen). This will reveal the various setup menu buttons:



ProSchool's splash screen (as shown above) will always appear the first time you open the program.

Configuring ProSchool to *Your* School

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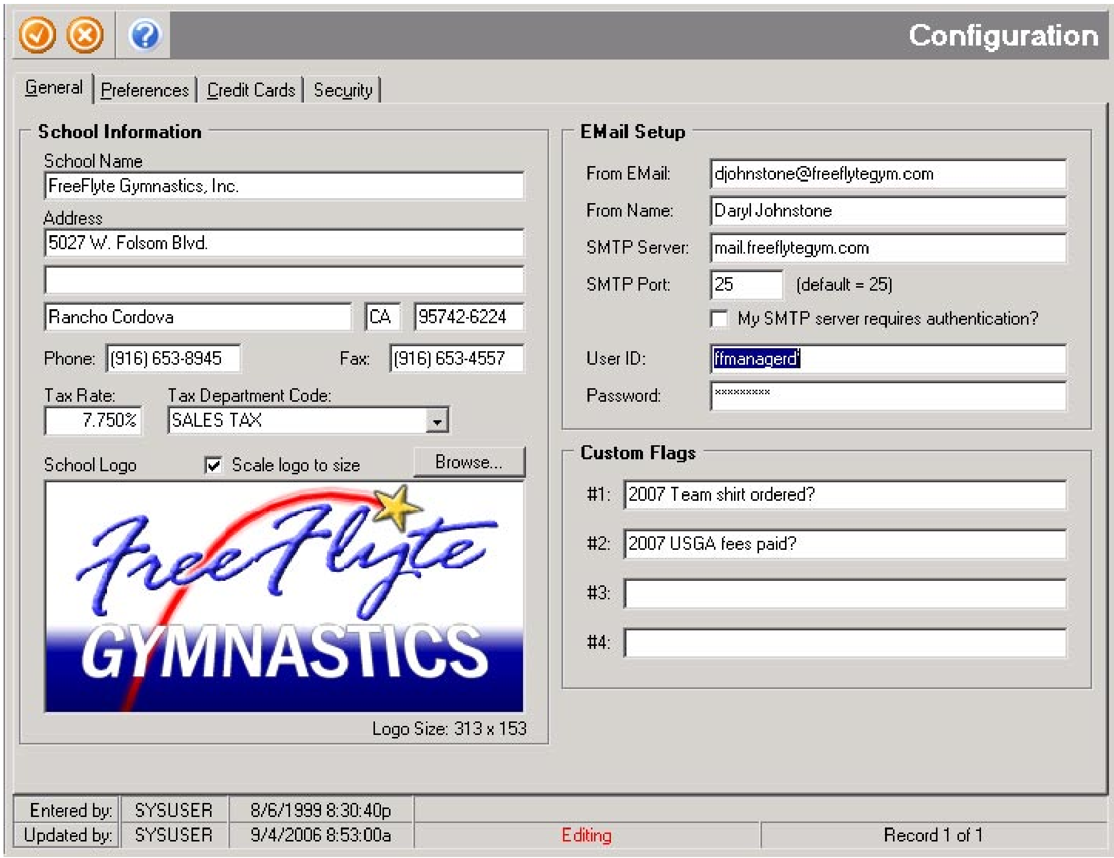
2. Click on the **Configure** menu button 

to open the **Configuration** panel:



Hint: Note the information given at the bottom of the window. At a glance you can see:

- *who originally entered the information, and when it was entered;*
- *who last modified it, and when it was last modified;*
- *context-sensitive hints for the field in which the cursor appears;*
- *whether you are in the "browse" or "edit" mode;*
- *which record you are currently in and how many total records currently exist.*

This information appears in the Clients, Students and classes windows, as well as in most other windows containing data fields.

By default, the **General** tab is selected, as shown above. Note there are three other tabs within the **Configuration** window (**Preferences**, **Credit Card** and **Security**), which we'll take in order.

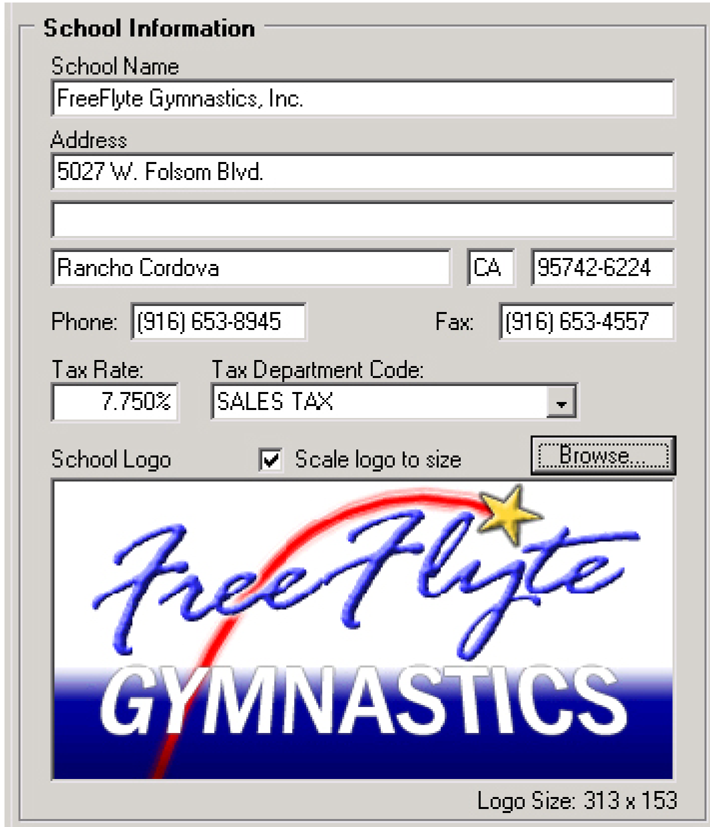
Hint: To move quickly from one section to another via keyboard shortcuts, use a combination of the **ALT** *key and the underlined letter in each section's tab title. For example, to go to the* **Preferences** *section from another section, press* **ALT**+**P** *(etc.).*

3. In the **School Information** section, enter your school's name, address and phone number(s), local sales tax rate, if applicable. Don't worry about the Tax Department Code for now. You can configure that when you get into setting up your school's codes, and you can always return to this section and select it at a later time.

Configuring ProSchool to *Your* School

–continued–

Once populated, your school's information section should look something like this:



The **School Logo** section (also shown above) allows you to conveniently store your school's logo within ProSchool, making it easy to embellish certain ProSchool reports and other output where appropriate. It's a good way to keep your "brand identity" highly visible.

4. To insert a logo, click the **Browse** button to navigate to the location on your computer where your logo resides.

The logo can be any of the following types: JPEG image file (.jpg, .jpeg), Bitmap (.bmp), icon (.ico), Enhanced Metafile (.emf) or Windows metafile (.wmf).

ProSchool can scale your logo for you to a preset size of 313 X 153 pixels (all ProSchool reports which utilize this logo are designed to use it at this size). To scale your logo to that size, check the **Scale logo to size** check box. For maximum image quality, you can use Photoshop or other graphics program to create your logo to the 313 X 153 pixel size (and UNcheck the box accordingly) so that no scaling is necessary. Alternatively, you can have a graphics professional do it for you.

Configuring ProSchool to *Your* School

–continued–

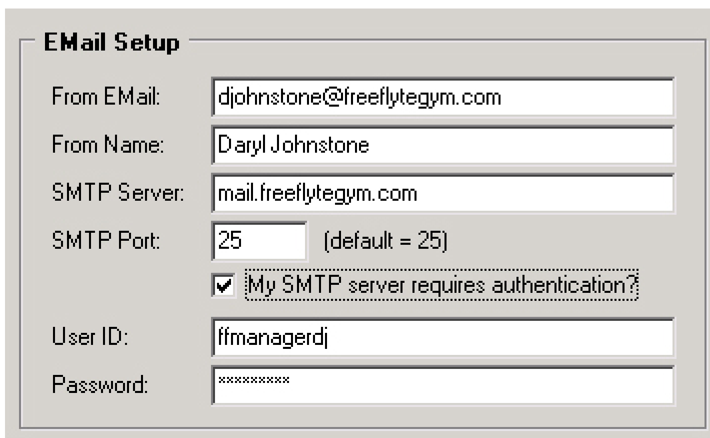
5. If you would like to be able to send mail from within ProSchool, you can configure the **EMail Setup** fields (shown below) as follows:

- **From EMail -** the sender's e-mail address you want the recipient to see (such as ("djohnstone@freeflytegym.com", "info@abcgymnastics.com", etc.).
- **From Name -** the "friendly" name you want associated with the e-mail address you enter in the above **From EMail** field.
- **SMTP server -** the SMTP server name you use for the above-entered e-mail address (such as "mail.abcgymnastics.com", etc.). If you have questions about what this should be, contact your system administrator, your e-mail service provider, etc.
- **My SMTP server requires authentication? -** if so (and increasingly this is the case), check the box, then enter the appropriate information in the **User ID:** and **Password:** fields. If you have questions about what to enter, your system administrator or e-mail service provider should be able to help you.

Hint: One easy way to find out the settings you'll need to send e-mail from within ProSchool is to check the outgoing mail settings on your own e-mail client (Outlook Express, Outlook, Eudora, Thunderbird, etc.).

Note that ProSchool's e-mail feature offers you the convenience of sending school-related e-mail from *within* ProSchool. It does *not* replace your existing e-mail program; you will still receive your e-mail through your e-mail client (Outlook, Outlook Express, Eudora, Thunderbird, etc.).

Though your e-mail configuration will contain different information, the following gives you a general idea of how this section might appear:



We recommend you write these settings down and keep them in a safe place, in case you need to refer to them in the future.

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UNDERSTANDING AND CONFIGURING CUSTOM FLAGS

Custom Flags (known as “Student flags” in previous versions of ProSchool) give you a way to track just about any custom piece of data you wish. They are best used for global data, i.e., data that relates to many or even all of your Students—but that’s up to you.

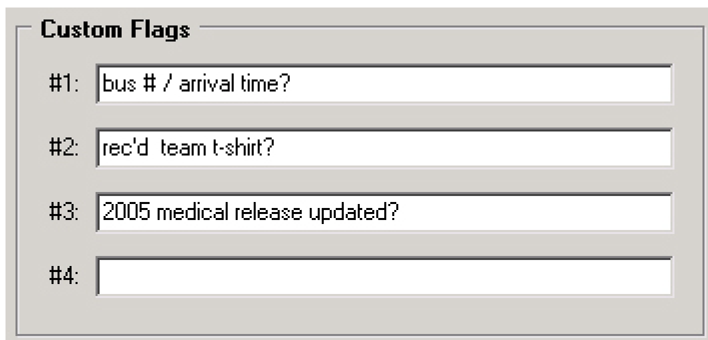
You can define up to four Custom flags; we'll use three examples:

1. If any of your Students are dropped off by a school bus, you can use a Custom flag for a bus number and time of arrival;

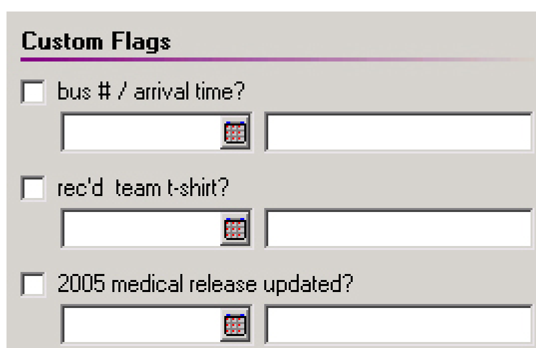
2. If your school had t-shirts made for each Student, you can set up a flag to track whether each Student received a shirt or not;

3. You could use a flag to note whether or not an updated medical release had been received from the parent.

The above examples would appear as follows:



Note this important distinction: The Custom flags are *defined* in this **Configuration / Custom Flags** window (“bus #/arrvl time”, “rec’d team t-shirt”, “2005 medical release updated?”, etc.) as shown above, BUT the *data* is actually entered in the **Custom Flags** section of the **Student Information** window using the check box, date, and data fields:



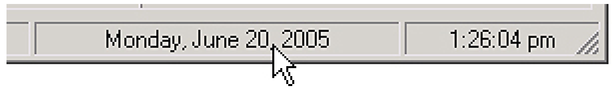
The **Student** window, including the above **Custom Flags** section, is discussed in detail below in the chapter, “Building Your School in ProSchool”. It appears here only to show the relationship between the **Configuration / Custom Flags** (where the flags are defined), and the **Students / Custom Flags** section (where the Student-specific data is actually entered).

Hint: You can return to the Configuration window at any time to update or correct data. Just remember to save your changes!

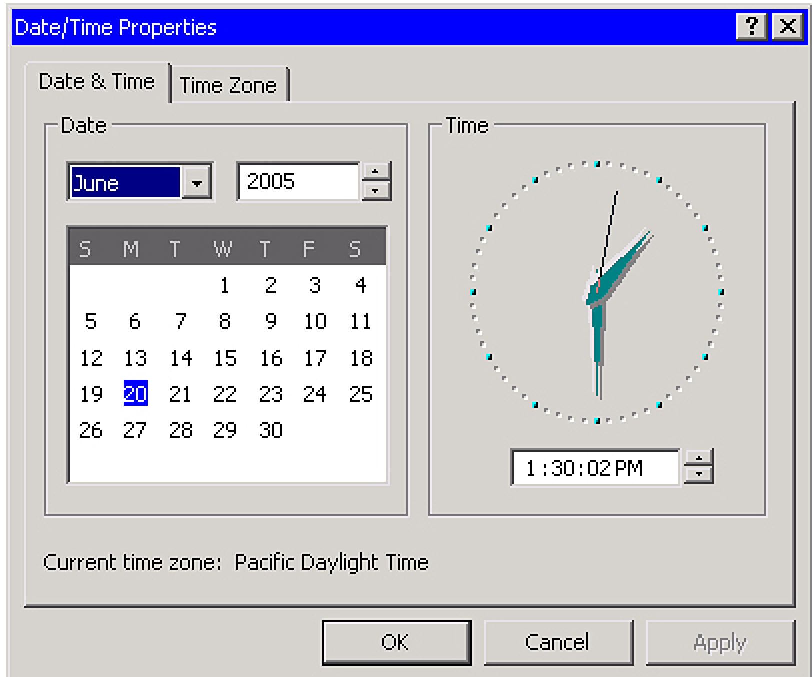
Configuring ProSchool to *Your* School

–continued–

Hint: If you want to change the date and/or time, double-click on either the date or time at the bottom right of the main ProSchool window:



This opens the **Windows Date/Time Properties** *window:*



You can make appropriate changes, then click **Apply** *(to apply the changes and keep the window open),* **OK** *(to apply your changes and return to ProSchool) or* **Cancel** *(to return to ProSchool without making any changes).*

4. Review the data you've input to ensure it is correct. ProSchool is now customized to your school.

Configuring ProSchool to *Your* School

–continued–

SETTING PREFERENCES TO CUSTOMIZE PROSCHOOL

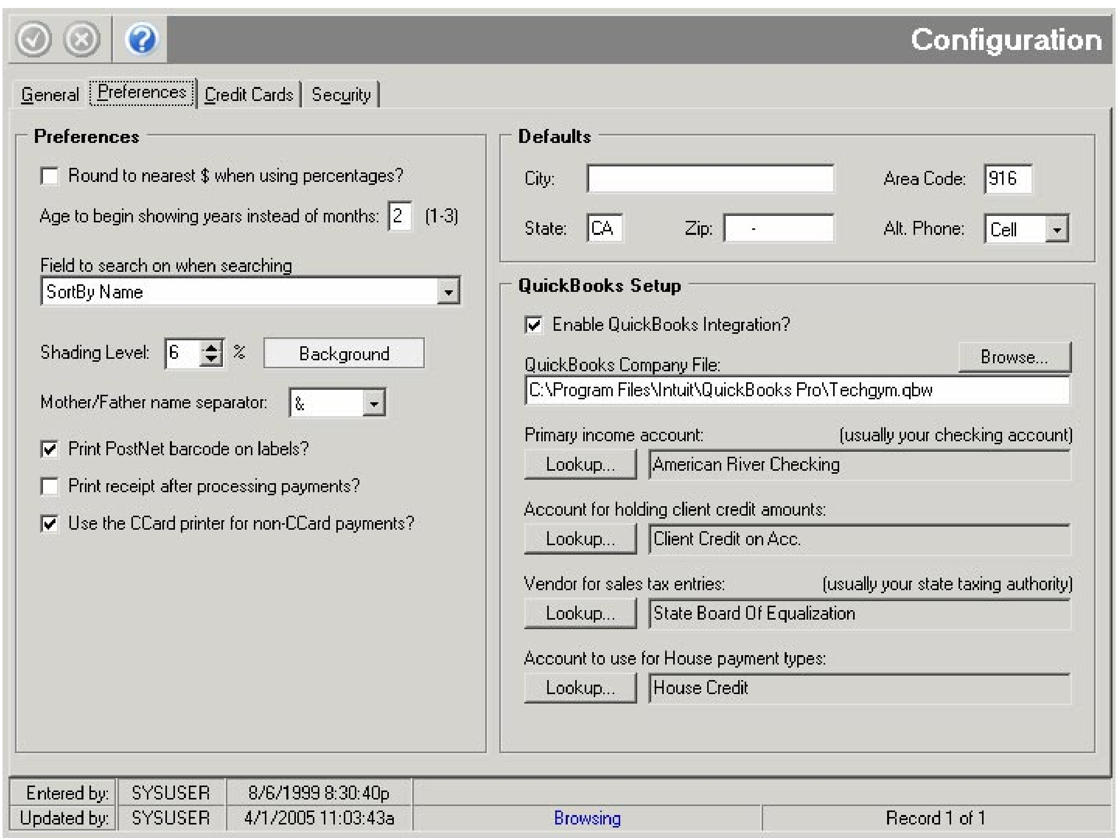
The next step in getting ProSchool configured for your school is to establish your program preferences. This makes ProSchool more efficient for you and your school.

ProSchool allows you to customize the software to make it more efficient and less time consuming in everyday use. For example, you can specify your preference for dollar amount rounding, default search fields (so the field you search most often will be the one that the search engine automatically starts in when you initiate a search), age threshold (the age at which ProSchool converts age data to years instead of months), and more. These small but significant defaults save you keystrokes, and that saves you time.

You can also define default values for all addresses and area codes entered into the program. This way, if the majority of your Students and teachers live in the same general area, share the same telephone area code, etc., you can avoid redundant input of repetitive information. (Default values are optional and you may wish to leave any or all of them blank if your Students and teachers have varying addresses and / or telephone area codes.)

To configure ProSchool to your preferences:

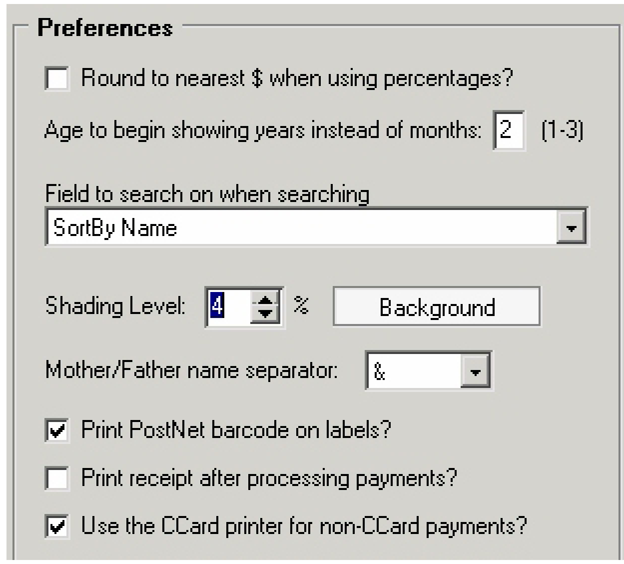
1. Click the upper **Preferences** tab (or use keyboard shortcut **ALT**+**P** to switch to the **Preferences** panel:



Configuring ProSchool to *Your* School

–continued–

2. If you want ProSchool to round tuition charges to the nearest dollar amount when computing percentages ($422.79 becomes $423.00; $78.32 becomes $78.00), select the **Round to nearest $ when using percentages** check box. Otherwise, amounts will be calculated to the penny. Here it is, in greater detail:



3. For your youngest Students, you can indicate the threshold age at which ProSchool shows their age in years (instead of months) by entering the correct value (**1**, **2** or **3** years) in the **Age to begin showing years instead of months:** field (shown above). For example, if you enter "**2**" ProSchool will always display a young Student's age using "**1**" through "**23**" (for months), then "**2**", "**3**", "**4**" (for years) and so on.

4. When you initiate searches, you can define which field ProSchool will default to (which you can always change). This saves you time, by allowing you to define the field you use most often. These are the options (also shown above):

- **Client ID**
- **Mother's Last Name**
- **Father's Last Name**
- **Student's Last Name**
- **Client's Home Phone**
- **SortBy Name** (default value)
- **Mother's First Name**
- **Father's First Name**
- **Student's First Name**

If you are new to ProSchool, don't worry about this feature now. It is set to default to **SortBy Name**, which is one of the most popular searches initiated by ProSchool users. As you grow more proficient with the Program, you can change the default to better suit your searches. Remember, too, that the field can always be changed for a given search (which does not affect the default search setting).

You will find that the search function in ProSchool is as helpful as it is versatile. If you remember only the first name of a Student, or only the last four digits of their phone number, you can easily zero in on the target of your search even with a database of hundreds of students.

5. To adjust the shading level ProSchool uses in its various reports so that print output is optimized (and ink usage is more efficient depending on your particular printer), you can adjust the **Shading Level** to a value between zero and 50% by clicking and / or holding down the small up or down arrows (shown above). As you do, the "Background" graphic immediately to the right will indicate the shading level chosen. You can experiment with your printer to see which shading level works best.

Configuring ProSchool to *Your* School

–continued–

6. You can define which separator will be used for Father / Mother titles (shown above). Your choices are "**/**", "**&**", "**or**", or "**and**". ProSchool defaults to "**&**". This setting determines how Father / Mother pairs will be displayed and printed out on statements, receipts and mailings. In other words, the above choices determine:

- how first names are combined when last names are the same, and;
- how whole names are combined when last names are different.

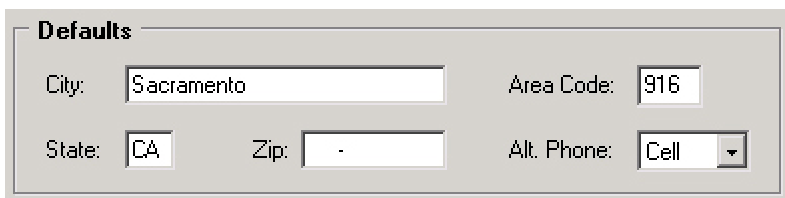
Of course, this only comes into play when you have both a father and a mother's name to work with.

7. When ProSchool prints out mailing addresses on statements, you have the option of having the PostNet barcode print across the top (which ProSchool automatically derives from the Zip+4 info). To do so, check the **Print PostNet barcode on labels?** check box (shown above). If you have a large client population and wish to get bulk mailing rates from the Post Office, they will require you to have PostNet barcodes on your mail. ProSchool makes it easy to do so.

8. If you would like ProSchool to print a receipt for each client payment you process, check the **Print receipt after processing payments?** check box as shown above. (If PCCharge processing is enabled, receipts for credit card and debit card payments will always be printed.)

9. If PCCharge credit card processing is enabled, and you would like receipts for *non*-credit card payments printed on the same credit card receipt printer, check the **Use the CCard printer for non-CCard payments?** check box (shown above).

10. If the bulk of your Clients share commonalities, for example, most of them are from the same city or town (such as "Sacramento", the example shown below), or share the same area code, etc., you can save keystrokes by defining defaults for the **City**, **State**, **Zip** and **Area Code** fields (shown above). For the **Alt Phone** field, select the type of phone you want this field's label to default to on the Client input window—**Cell**, **Fax**, **Pager** or **Work**.



Remember: You do not have to input data in every field—only in the fields that you wish. For example, let's say your Clients come from a wide geographical area encompassing multiple cities or towns, and share only a common state and area code. In this case you would only want to enter your state and area code, leaving the other fields blank. Then, when inputting in the **Client** window, those fields would display your state and area code; the other input fields would remain blank until you input them. For Clients to whom the defaults do not apply, simply overwrite the default data with the correct information.

The **QuickBooks Setup** section is covered in a separate chapter later in the manual.

Configuring ProSchool to *Your* School

–continued–

Setting Up ProSchool's Online Credit Card Processing

ProSchool makes it easy to accept various electronic payment types (credit cards and ATM cards) as payment for all types of transactions (tuition, dues and fees, store, etc.).

Here's how it works: You configure your PC to run PCCharge software (a highly secure payment processing software product from industry-leader VeriFone) which in turn allows you to accept electronic payments on your computer.

The PCCharge software is included with ProSchool, but *does not install by default.* If you decide you want to accept electronic payments, the following steps outline the setup process:

1. If you don't already have one, you'll need to set up a merchant account with your bank or other merchant account services provider. When you do so, they will give you the merchant account setup parameters you will need to configure PCCharge on your computer.

2. Contact Auburn Electronics Group (ProSchool's publisher) and purchase the license (serial number) for your PCCharge software.

3. Install the PCCharge software from the ProSchool installation disk.

4. Call PCCharge tech support at **(877) 659-8981** and give them the serial number to validate your copy of PCCharge. You should also be ready with your merchant account setup parameters, which your merchant account provider (bank) should have provided you when you set up your account.

5. PCCharge Tech Support will walk you through the setup and configuration process to ensure your online payment system is working correctly. **There is no extra charge for this service.**

6. After you finish with PCCharge Tech Support, you will continue to the steps on the following pages to complete the PCCharge configuration. Please note that if you get stuck, PCCharge Tech Support cannot help you with these settings. Not to worry! They're very simple, and ProSchool Tech Support will be happy to help you with them. Just call us at the tech support number given inside the cover of this manual.

Configuring ProSchool to *Your* School

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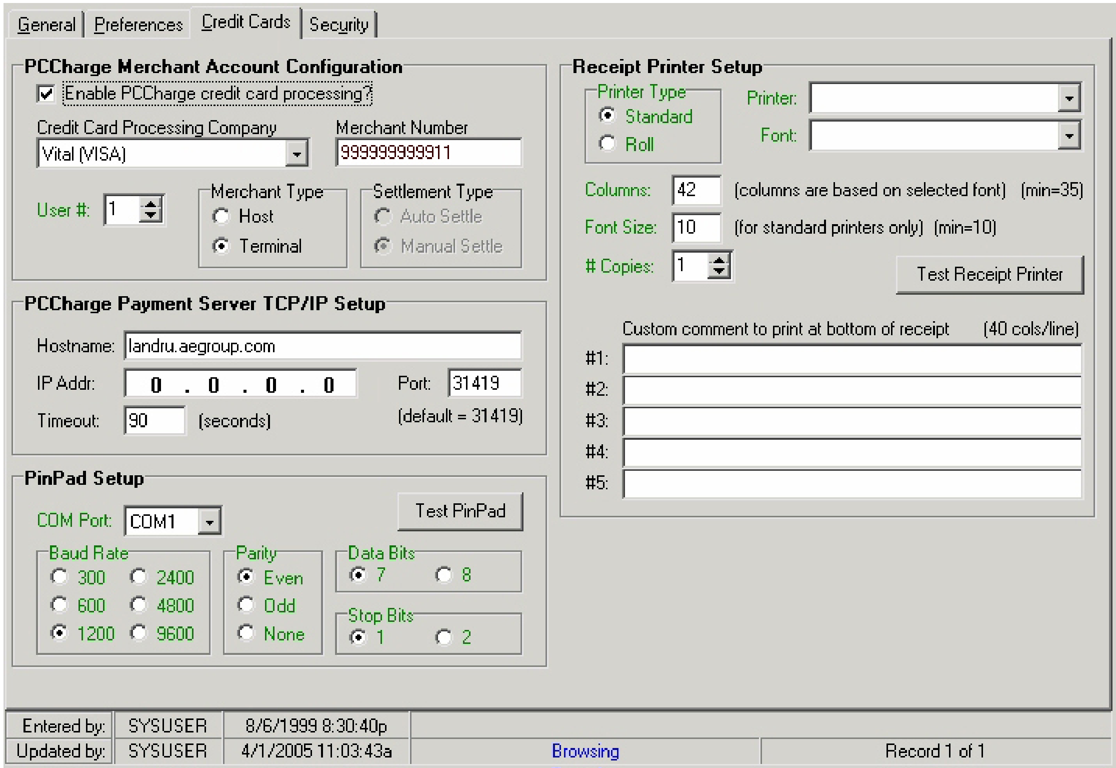
To configure ProSchool for electronic payment processing:

1. Click the upper **Credit Cards** tab (or use keyboard shortcut **ALT+C**) to switch to the **Credit Cards** panel:



Note: the text in green in the above screenshot depict values that are unique to a specific computer; they may not match what appear in this window on your computer.

There are four sections to this tabbed panel.

Configuring ProSchool to *Your* School

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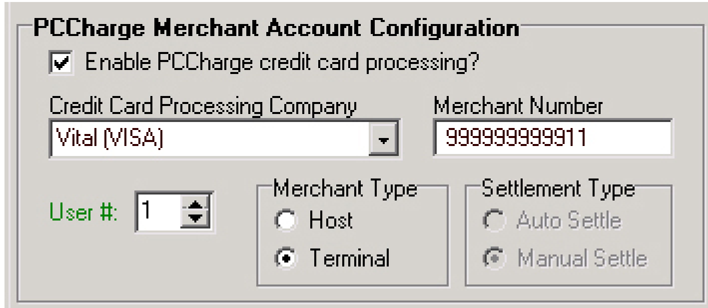
First, we'll focus on the **PCCharge Merchant Account Configuration** section:

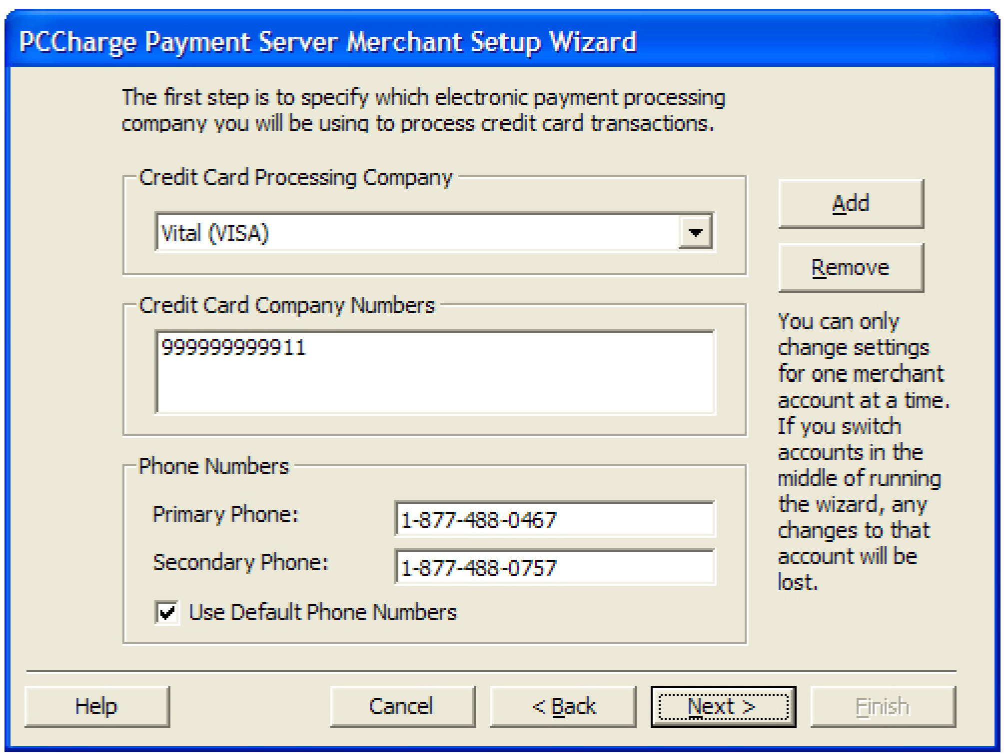


2a. Enable ProSchool's electronic payment capabilities by clicking the **Enable PCCharge processing?** check box.

2b. In the **Credit Card Processing Company** field, use the drop-down menu to select the credit card processing company with which you have set up a merchant account.

2c. Enter your school's merchant number (which your merchant account services provider should have given you) in the **Merchant Number** field.

! The credit card processing company you select in "2b." (above) *must* match the company shown in the **Credit Card Processing Company** field in the **PCCharge Payment Server Merchant Setup Wizard** window:



Likewise, the merchant number entered in "2c." must match the merchant number you enter into the **Credit Card Company Numbers** field, as shown immediately above.

Configuring ProSchool to *Your* School

–continued–

2d. In the **User #:** field, use the arrows to choose the number of PCCharge user licenses you have purchased (from 1–99). This parameter corresponds to the user accounts set up in PCCharge. **User “1” is defined by default.** Unless additional user licenses have been purchased to allow for more than one computer processing credit cards, this should be left at “1”.

2e. Select the applicable **Merchant Type** according to the instructions provided to you by your merchant account provider. If you are a **Host** merchant, then select the appropriate **Settlement Type** (**Auto Settle** or **Manual Settle**. (If you select **Terminal** for your Merchant Type, the **Settlement Type** box is grayed out and automatically defaults to **Manual Settle**.)

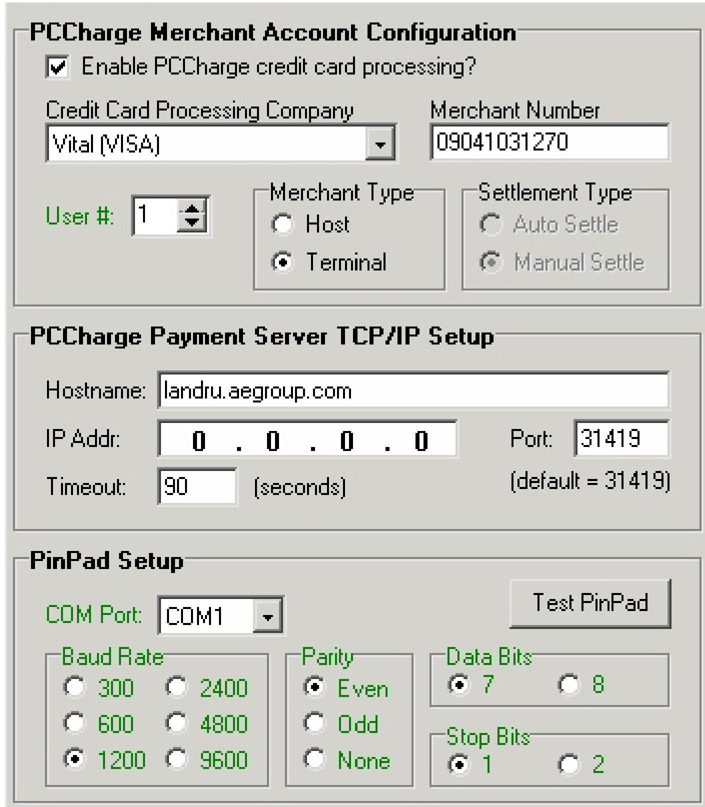
PCCharge is pre-configured for use with many of the most popular merchant payment processing service providers, as shown in the matrix below.

Credit Card Processor	Code	Host	Terminal	Dial/ Modem	TCP/IP (Internet)
Alliance Data Systems, Inc.	ADSI	x		x	
American Express	AMEX	x		x	
Buypass, Inc.	BPAS	x		x	x
CardSystems *(formerly Maverick Processing Systems)*	MVRK		x	x	x
Concord / EFS	CCRD	x		x	x
ECHO *(aka Electronic Clearing House)*	ECHO	x		x	
FDMS Nashville / Envoy	FDCN		x	x	x
FDMS North / CardNet *(formerly Card Establishment Services)*	CES		x	x	x
FDMS Omaha / FDR	FDC		x	x	x
FDMS South / NaBanco	NB		x	x	x
Fifth-Third Bank-St. Pete	BPS	x		x	x
First Hawaiian	FHAW		x		x
First Horizon *(formerly First Tennessee Merchant Services)*	FTMS		x	x	x
Global Payments - Central *(formerly MAPP)*	MAPP	x		x	
Global Payments - East *(formerly National Data Corporation)*	NDC	x		x	x
Heartland Payment Systems	HPTS		x	x	x
RBS Lynk Systems, Inc.	LYNK		x	x	x
NOVA *(aka Nova Information Systems)*	NOVA	x	x	x	x
NPC *(aka National Processing Company)*	NPC		x	x	x
Paymentech *(formerly Gensar, Transnet)*	GSAR	x		x	x
Royal Bank of Canada	RBOC	x		x	
Vital *(aka VisaNet)*	VISA		x	x	x

Configuring ProSchool to *Your* School

–continued–

Let's expand the window to the additional sections:



You'll note several fields highlighted in green. These indicate parameters that are unique to the computer on which they are configured (i.e. if you are using multiple computers to process credit cards, these values will vary from one computer to the next).

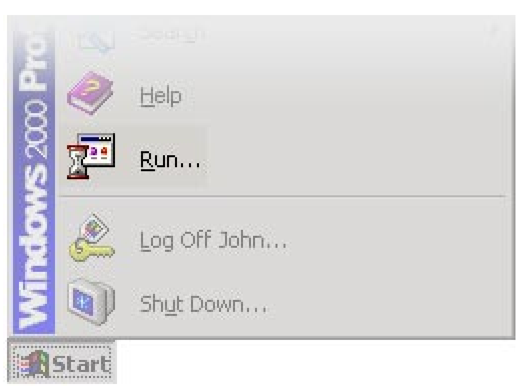
3a. If your school uses only one computer to process credit cards, and that same computer also has PCCharge installed on it, then use the default values in the **PCCharge payment Server TCP/IP Setup** section ("**localhost**" and "**127.0.0.1**").

3b. If you use multiple computers to process credit cards, OR if the computer that PCCharge is installed on is NOT the same computer on which you will process credit cards, then you will need to configure the **Hostname:** *or* **IP Addr:** fields (typically one or the other, not both).

The "hostname" is your computer's identity, and can be found as follows:

3c. Click 

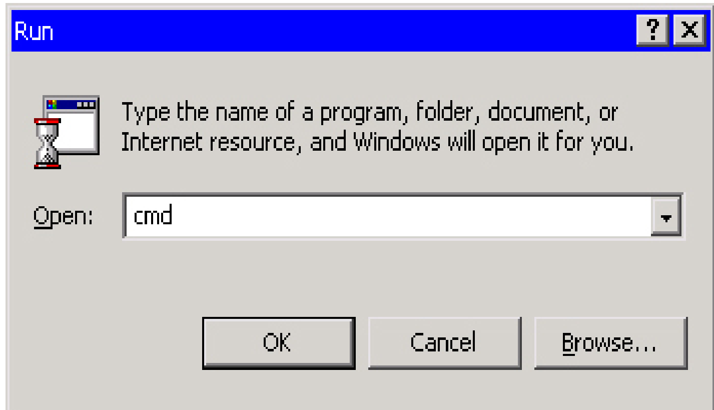
(extreme lower left-hand corner of your desktop) to bring up the basic Windows system menu:



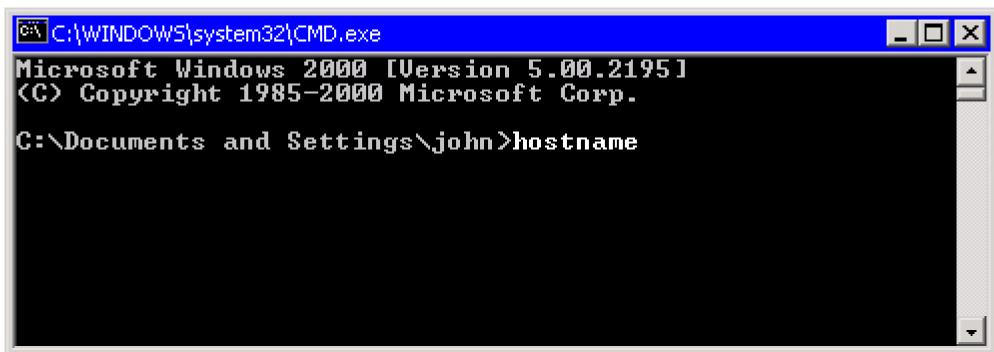
Configuring ProSchool to *Your* School

–continued–

3d. In the above system menu, click  to open the **Run** window:

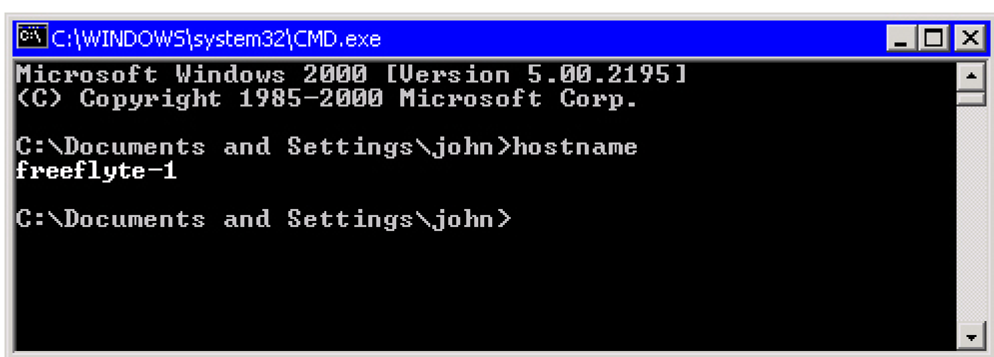


3e. Type in “cmd” (in lower case without quotes) and click **OK** to open the DOS command dialog window:

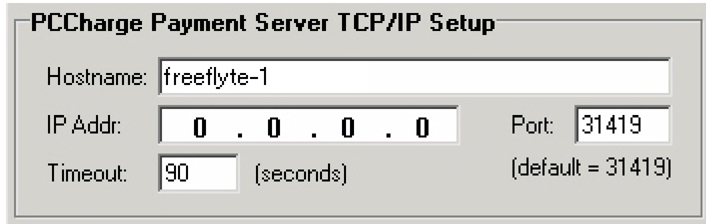


Note that your computer may differ somewhat from the prompt shown above; in any case, the prompt starts with “**C\:**” and ends with a “**>**”. You type the input immediately after that (at the blinking cursor). Type in “hostname” as shown above (lowercase, no space) and type the **ENTER** key.

The computer will return your name:

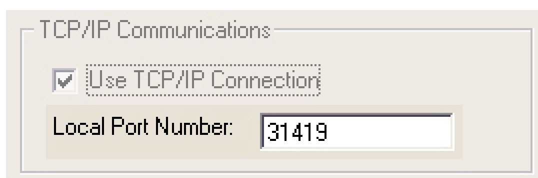


In the example above, the computer's name is "freeflyte-1". That is the name you enter into the **Hostname:** field:



Note: In the vast majority of configurations, it is only necessary to enter the "Hostname" as described in the above steps; the **IP Add:** field can be left at the default value of "0.0.0.0". This is because many LANs use dynamically-assigned IP addresses and do not require that you specify an IP address in the **IP Add:** field. If, however, you run into problems with the TCP/IP setup described above, please contact Auburn Electronics Technical Support at the number inside the front cover of this manual.

3f. For payment processing, ProSchool defaults to your computer's port #31419. This should work for most situations, but you can enter an alternative port address--should that become necessary--in the **Port:** field. If you do change the port value, make sure you also change the value in the **Local Port Number** field that appears in the PCCharge **Advanced Configuration Setup** window. They must be the *same value* in order for PCCharge to work:



3g. ProSchool defaults the value in the **Timeout:** field to 90 seconds, which should be sufficient. However, if you run into problems with slow connections or server overload (payments take a long time to process), you may have to raise this value. However, please note that payments should normally be processed fairly rapidly, and *the need to raise the timeout value higher is usually indicative of a problem elsewhere.*

4. Note that ProSchool only supports the VeriFone 1000-series pinpad. If you need a different cable than provided with your VeriFone pinpad unit, it would be supplied through your merchant account provider.

Configuring ProSchool to *Your* School

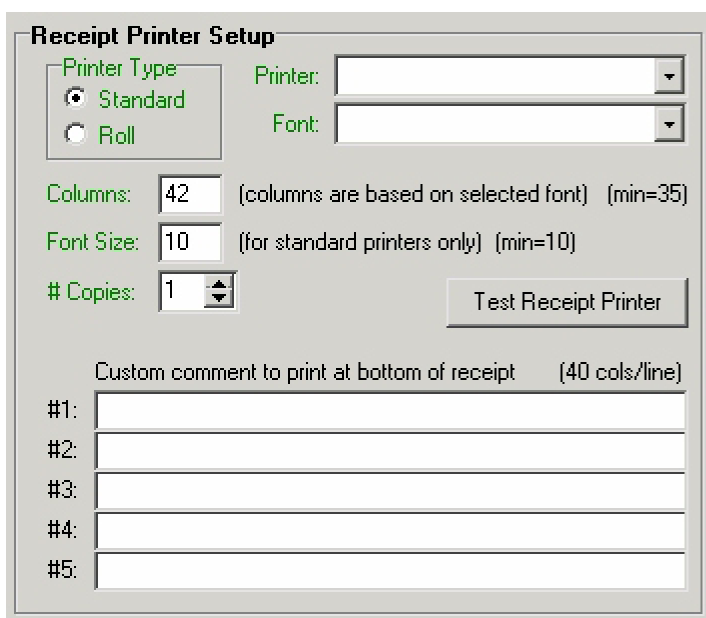
–continued–

The **PinPad Setup** configures your PinPad device for proper communication with the computer on which you have ProSchool installed. Use the default values to begin with, as they will apply to the majority of configurations. You can test your PinPad function easily by clicking on the **Test PinPad** button. After several seconds, a confirmation message will appear:

If the PinPad and computer are unable to “see” each other, the following message will appear:

Your computer may have another device using COM Port #1, such as a dial-up modem or serial mouse. Even if you’re not sure of this, try selecting **COM2** from the **COM Port:** drop-down menu. Click the **Test PinPad** button. If you still receive the above error message, make sure the pinpad is connected to power via the supplied power adapter cable. If the problem persists, contact Auburn Electronics Technical Support at the number inside the front cover of this manual.

5a. You can configure ProSchool for your specific receipt printer in the **Receipt Printer Setup** section:



Configuring ProSchool to *Your* School

–continued–

It is assumed that your printer is already installed and recognized by your Windows operating system; if not, please install the appropriate printer drivers before continuing.

5b. Use the **Printer:** drop-down menu to select the printer you wish to use for receipt printing.

5c. Use the **Font:** drop-down menu to select the font your printer will use when it prints receipts. You should select a built-in printer or device font (which should be a monospaced or non-proportional font). See your printer manual for more information on fonts used with your printer.

5d. Enter the column width in the **Columns:** field (consult your printer's owners manual if in doubt).

5e. Use the **Font Size:** drop-down menu to select the font your printer will use when it prints receipts. The minimum font size is 10 points, and if you have room on your paper, you could even use 11 or 12 point size for better readability (you know how irritating hard-to-read receipts are!).

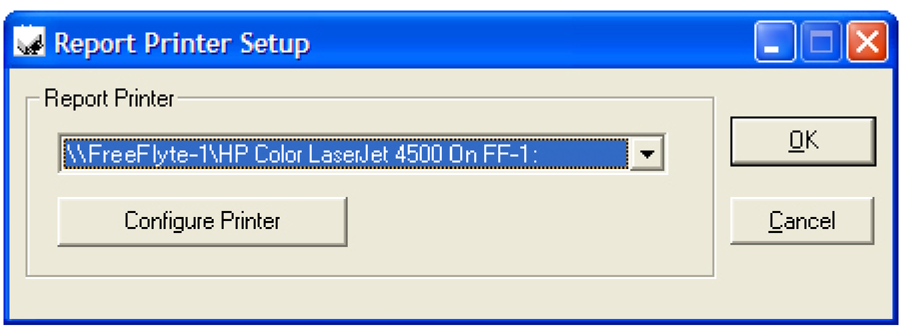
5f. Use the **# Copies:** field to select how many copies of each receipt you want the printer to print out (1–99). This is useful, for example, if you want to keep a printed copy of each receipt on file, in addition to the copy you give to the client (in which case you would select "**2**"). Note: If you are using a roll printer with carbon paper, you should select "**1**" since every print cycle will produce two copies of the receipt.

5g. To print a message at the bottom of the receipt, use the **Custom comment to print at bottom of receipt** fields (there are five lines, each limited to 40 characters per line). So, for example, you could print a customary message such as, "Thank you for your business", or print an announcement such as, "We now carry the InFlight line of leotards in our store. Come in and check it out!". The appropriateness of the message (given that many people may not read their receipts) is up to you, but the feature is there if you would like to use it.

5h. Finally, select the printer in the PCCharge configuration screen (not in ProSchool!), which is found by navigating the following menus:

Setup | Hardware | Setup Printer | Report Printer

...to open the following window:



The next tab in the Configuration panel, Security, is a comprehensive issue (though easy to set up) so it is covered in its entirety in the next section.

Configuring ProSchool to *Your* School

Security In ProSchool - An Overview

ProSchool offers sophisticated and powerful security features that are completely customizable. You can also choose not to enable the security functions, in which case *all* users have access to Student, Client, class and accounting data, *including the ability to make changes to that data.*

ProSchool's security options allow you to restrict or prohibit access to and modification of various types of data, and allows you to do so with complete flexibility. For example, you can create custom security profiles such as these:

–continued–

- the manager could access and modify all data (Client, Student, class and accounting records);
- the assistant manager could access all records and add charges, but could not delete or modify charges—which means he or she would need a manager login to do so;
- a Student assistant could access all Student records, but could not modify them without the manager logging in (or assistant manager or other individual whose security profile permits such access).

ProSchool allows you to change users—utilizing different logins and passwords—*during* a session (also called a "hot login"). It is not necessary to close the program and then start it again with a different user's login. This feature allows multiple security profiles in a single session, such as in the example above where a user with a lesser security profile could not access or change data without the login of a manager.

In effect, users with higher security levels (owners, managers, assistant managers, etc.) can give "permission" to users of lower security levels (receptionist, Student assistant, parent, etc.) when clearance is required for certain "secure" data entry or modification, and while the program is running. Think of it as a key that temporarily unlocks a secure area.

Then, after the lesser user is finished with that specific "high-security" task, that individual would then log in using their own password, thus once again denying them access to the secure areas of the program (as previously determined and configured by you).

It is important to note that *the current login always determines the security level.* For this reason, it is important that each user's password be known only to them and the manager (or suitable other principal). By the same token, it is also very important that when a manager or other individual with higher security clearance gives "permission" by entering their login, *they remember to have the lesser user log back in after the secure task has been completed.* Otherwise, security is compromised and a great deal of damage, intentional or not, can be done to your school's records.

ProSchool's security features are user-centric, meaning they are referenced to a specific user; therefore, to use the security features, you must define users. This section will begin by showing you how to add and delete users, then we'll move to configuring varying levels of security by user.

Configuring ProSchool to *Your* School

–continued–

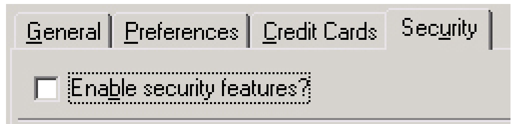
ENABLING PROSCHOOL'S SECURITY FEATURES

To use ProSchool's security features, they must first be activated:

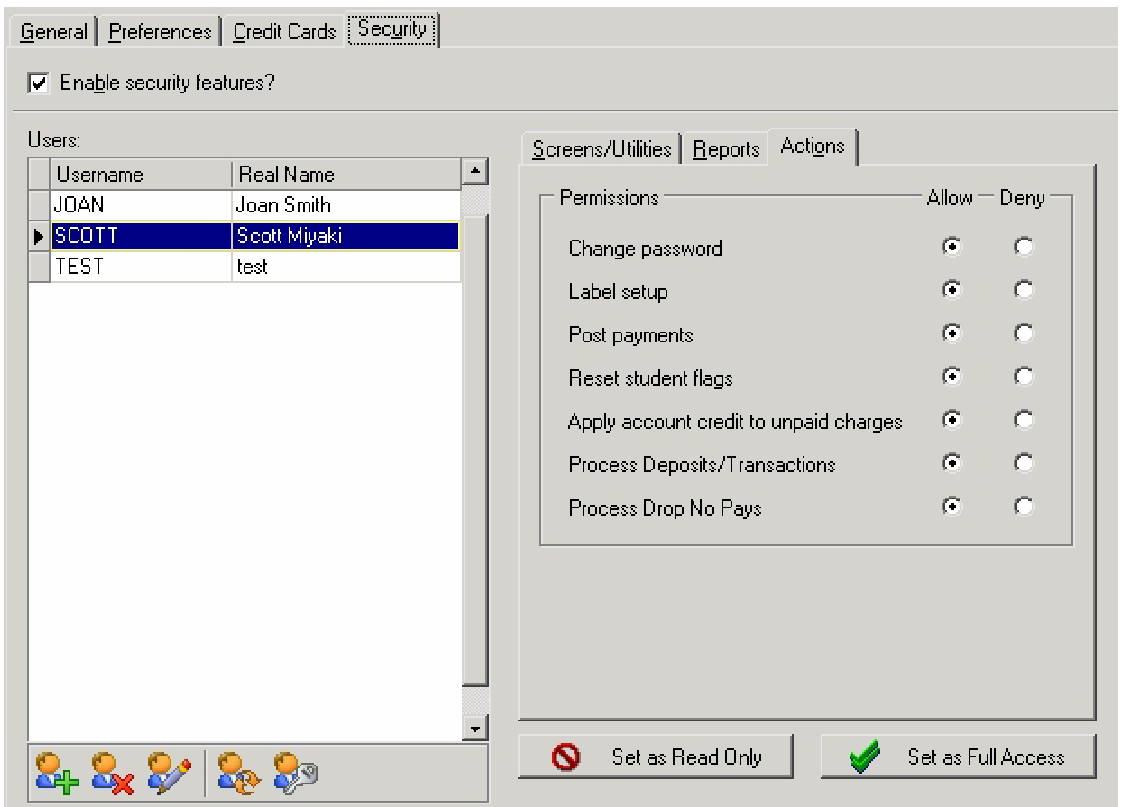
To enable the security profiles:

1. In the Configuration window, Click the upper **Security** tab (or use keyboard shortcut **ALT**+**U)** to switch to the **Security** panel.

2. Check the **Enable security features?** check box that appears immediately below the four tabs:



This will reveal the Security Features panel:

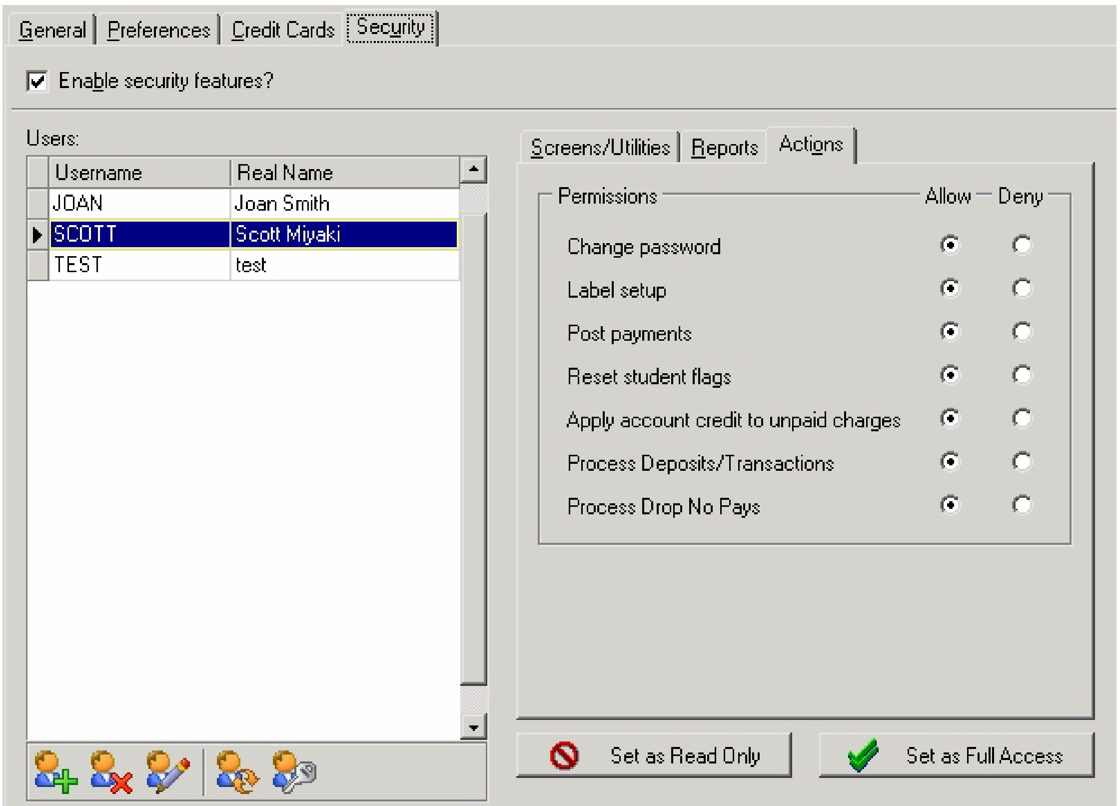


■ Adding / Deleting / Editing / Copying ProSchool Users

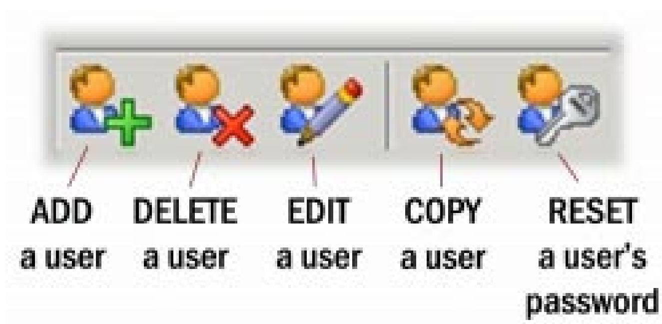
As we've discussed, ProSchool's security features are specific to the user, so the first step in setting up a secure ProSchool is to define users.

To ADD a user to ProSchool:

1. In the Configuration window, Click the upper **Security** tab (or use keyboard shortcut **ALT+U)** to switch to the **Security** panel:



Note that the **Users:** list appears on the left (currently populated by Joan, Scott and Test). On the right is the panel where the permissions are set for each user. At the bottom of the user's panel is a series of icon buttons:

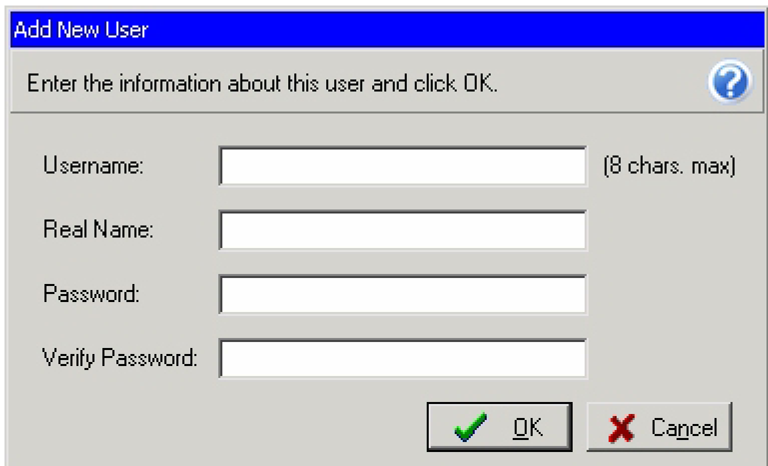


Configuring ProSchool to *Your* School

Hint: ProSchool features context-sensitive rollover help, so if you forget what a button does, just rest your cursor over the button to reveal its purpose:

–continued–

2. Click  (the "Add New User" button) to open the **Add New User** dialog window:



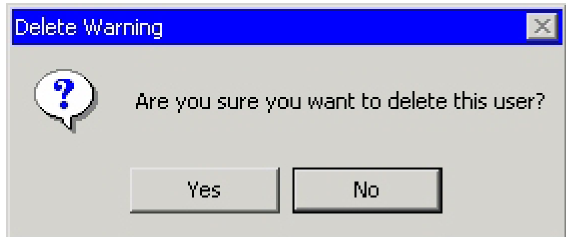
3. Enter the appropriate information in the **User name:** and **Real Name:** fields (for example, "SCOTT" and "Scott Miyaki"). Note that the Username does *not* have to be the same as the person's first or last name, so "handles" or screen names are OK (i.e., username "RINGKING" for employee "Scott Miyaki"). Also, note that the user name will always be in caps (no lower case).

4. Enter the password and reenter it in the **Password:** and **Verify Password:** fields. **Note that passwords ARE case-sensitive!**

5. Double check your entries for accuracy, then click **OK** when done. That user's name will now appear in the **Users:** list. Or, click **Cancel** to abandon the changes.

To DELETE a ProSchool user:

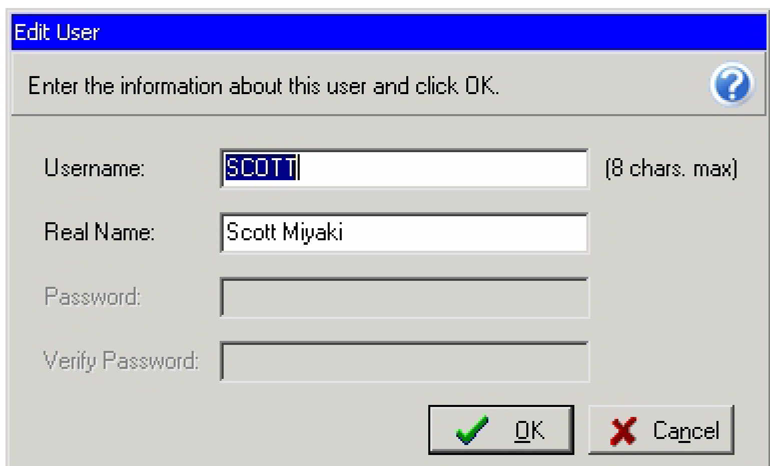
1. In the **Users:** list, click on the user you want to delete and click (the “Delete User” button). A confirmation dialogue will appear:



Click **Yes** to delete the user, or **No** to abort the deletion and close the dialog box.

To EDIT a ProSchool user:

1. In the **Users:** list, click on the user you want to edit and click (the “Edit User” button). The **Edit User** window will appear:



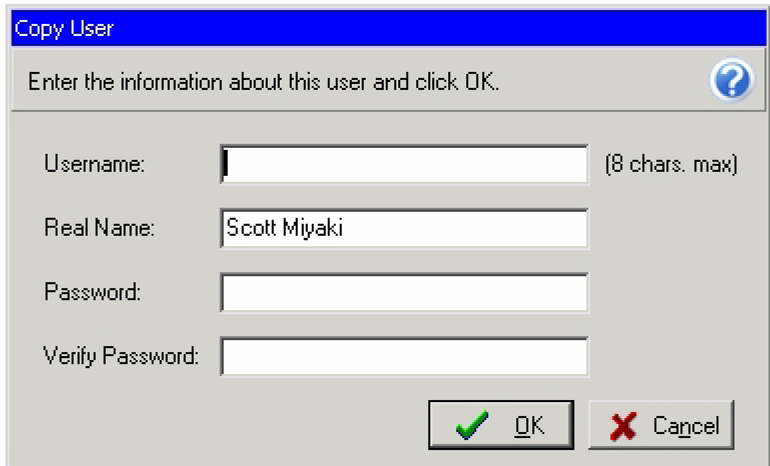
Note that this window allows you to change the **Username:** and **Real Name:** fields *only* (not the password--that’s a different procedure shown below). Make the desired changes, then click **OK** to save the changes or **Cancel** to abandon the changes.

Configuring ProSchool to *Your* School

–continued–

To COPY an existing ProSchool user:

1. In the **Users:** list, click on the user you want to copy and click  (the "Copy User" button). The **Copy User** window will appear:



Note that this function is useful if you have a new employee that will have the same permissions as an existing employee; in other words, it allows you to clone an existing employee's permissions profile.

Make the desired changes, then click **OK** to save the copied profile under the new name, or click **Cancel** to abandon the Copy User function.

Hint: After copying an existing user's profile, it is a good idea to review the permissions settings to make sure they are appropriate for the new user.

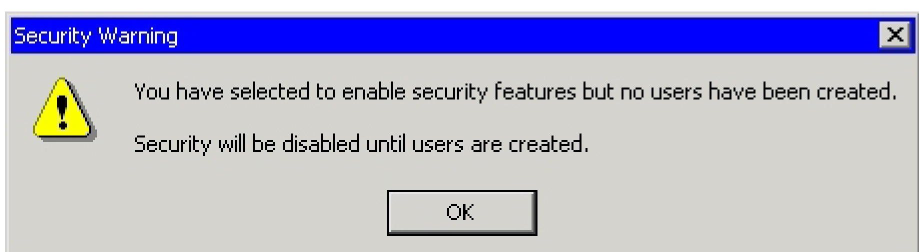
To RESET a user's password:

1. In the **Users:** menu, click on the user whose password you want to reset, and click (the "Reset Password" button) to open the **Reset Password** window:

Note that this window allows you to reset only the password (as opposed to the **Edit User** window, which only allows changes to the Username and Real Name).

Make the desired password changes (note that characters will appear as asterisks). Password fields are limited to a maximum of 20 characters. Click **OK** to save the new password, or **Cancel** to abandon the password change. **Remember that passwords are case-sensitive.**

! If you have enabled the security features but have *not* yet defined any users (that is, you haven't entered user names and passwords), ProSchool will disable the security features and default to username "SYSUSER" as the user for future sessions *until new users are defined*. When you leave the **Security** panel, the following warning message appears:



Though clicking **OK** closes the window and ultimately returns you to the main **ProSchool** control panel, you can always reopen the **Configuration** window and change any settings you may have made in error.

Configuring ProSchool to *Your* School

SETTING SECURITY PERMISSIONS FOR SPECIFIC USERS

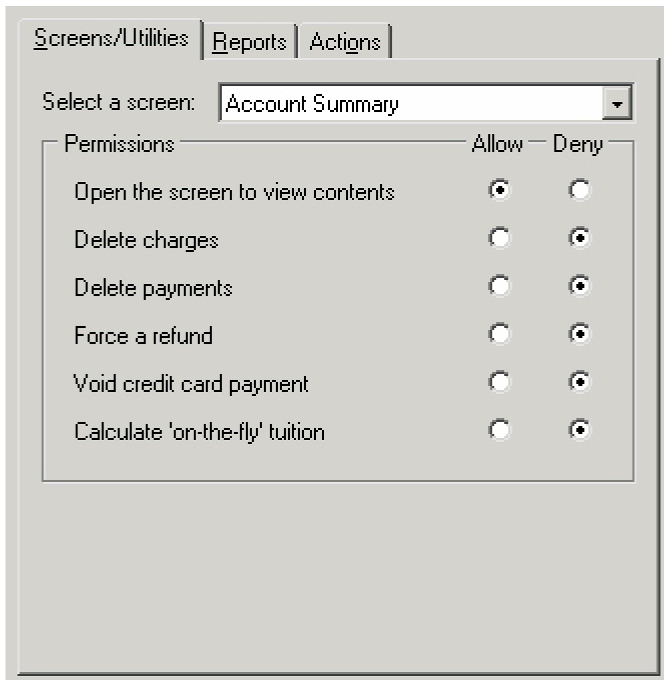
Now that you have defined users, you're ready to set security permissions for them. ProSchool gives you a large number of specific areas (screens and utilities) that you can allow or deny access to. The list that appears on the next several pages may be overwhelming, but the process is actually very easy. Just follow the steps, and once you understand the way ProSchool sets permissions, you'll be able to set up user security profiles very quickly.

To configure a user's security profile ("permissions"):

–continued–

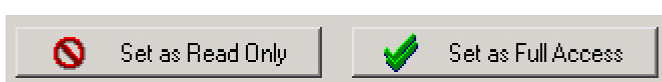
1. In the **Users** list, select the name of the person for whom you wish to configure a security profile.

2. Select the **Screen/Utilities** tab and select a screen or utility from the **Select a screen:** drop-down menu:



Note that the permission options vary depending on the screen you select.

3. Some users, such as students who work in the office, are given only "read only" privileges in ProSchool. Others, such as owners or high-ranking managers, are granted full access. To quickly apply either of these profiles to a particular user, simply click on the user's name and then select one of the following buttons as appropriate:



4. To customize a particular user's profile—that is, selectively restrict or allow access in specific areas of ProSchool, select **Allow** or **Deny** as appropriate for the user security profile you are configuring. The available allow / deny options for each screen and utility are shown beginning on the following page.

Configuring ProSchool to *Your* School

–continued–

Account Summary
- Open the screen to view contents
- Delete Charges
- Delete Payments
- Force a refund
- Void credit card payment
- Calculate “on-the-fly” tuition

Attendance
- Open the screen to view contents
- Add / edit attendance information

Auto Pay
- Open the screen to view contents
- Edit existing records
- Process autopays

Backup / Restore
- Perform backup
- Perform restore

Billing Category Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records
- Merge records

Billing Options
- Run automatic tuition charges
- Run billing based charges
- Run class based charges
- Run registration / insurance charges

Charge Details
- Open the screen to view contents
- Edit existing records

Charge Entry
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Charge Entry Test Calculation
- Perform test calculation
- Print report
- Preview report

Cities
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Class Information
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Configuring ProSchool to *Your* School

–continued–

Class Level Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Class Type Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Client Comments
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Client Information
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Code Definitions
- Open the screen to view contents

Configuration
- Open the screen to view contents
- Modify general information
- Modify credit card setup

Count Students
- Open the screen to view contents
- Print report

Database Maintenance
- Check / re-gen indexes
- Verify / rebuild tables
- Reinitialize database
- Database Explorer
- View active users

Department Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records
- Merge records

Drop Class Dialog
- Don’t create drop history record

Drop Reason Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Configuring ProSchool to *Your* School

–continued–

EMail
- Open the screen to view contents
- Save email templates
- Delete email templates
- EMail client statements

Enrollment Maintenance
- View enrolled list
- View waiting list
- Add Student to class
- Drop Student from class
- Transfer Student to another class
- Edit enrollment details

Enrollment Snapshots
- Take enrollment snapshot
- View enrollment snapshots
- Delete enrollment snapshots

Hourly / By Student Rate Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Label Definitions
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Location Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Make-ups and Free Classes
- Open the screen to view contents
- Schedule free classes
- Schedule make-ups
- Delete make-up and free classes

Manager Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Payment Entry
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Referral Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Configuring ProSchool to *Your* School

–continued–

Reports
- Open the screen to view contents
- Print report
- Preview report

Resource Planner
- Open the screen to view contents
- Edit existing records
- Print / export planner
- Change planner options
- Add / edit / delete resource groups
- Add / edit / delete resources

Security
- Enable / disable security
- Add new users
- Edit existing users
- Delete users
- Change user's password
- Set permissions

Skill Group Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Skill Level Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Skill Status Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Student Enrollment History
- Open the screen to view contents
- Edit existing records
- Delete records

Student Information
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Student Skill Tracking
- Open the screen to view contents
- Edit existing records
- Add skill level
- Delete skill level
- Hide / unhide skills

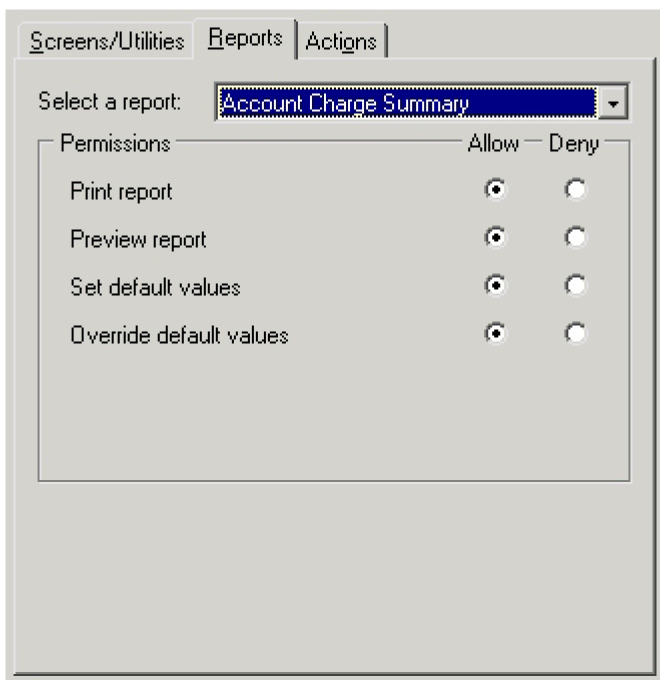
Teacher Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Teacher Class Schedule
- Open the screen to view contents
- Print/export planner
- Change planner options

Tuition Codes
- Open the screen to view contents
- Add new records
- Edit existing records
- Delete records

Volume Discounts
- Open the screen to view contents
- Modify monthly discounts
- Modify session discounts
- Modify weekly discounts
- Modify sibling discounts

5. Click on the **Reports** tab and select a report from the **Select a report:** drop-down menu:



As above in step #3 (setting permissions for the screens and utilities), the permission options vary depending on the report you select. The specific permissions available for each report are shown in the chart on the next page.

Configuring ProSchool to *Your* School

–continued–

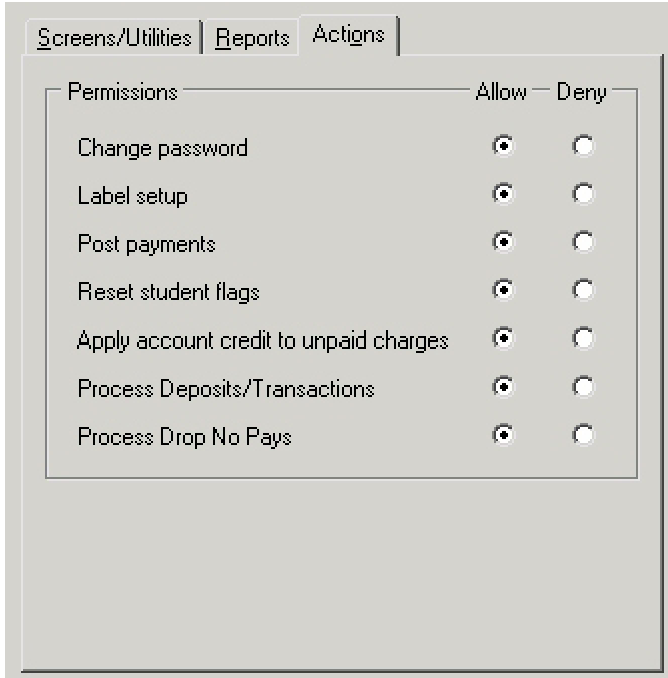
Configuration Options for ProSchool Reports

	Print report	Preview report	Print labels	Set default values	Override default values	Delete Client records	Add/edit/ delete memos
Account Charge Summary	•	•		•	•		
Account Payment Summary	•	•		•	•		
Aged Account Balance	•	•	•	•	•		
Attendance Summary	•	•		•	•		
Batch Post-Settle	•						
Batch Pre-Settle	•						
Birthday Summary	•	•	•	•	•		
Category Summary	•	•	•	•	•		
Class Roll Sheet	•	•		•	•		
Class Summary	•	•	•	•	•		
Client Activity	•	•	•	•	•	•	
Client Comments	•	•		•	•		
Client Statements	•	•	•	•	•		•
Client Summary	•	•	•				
Codes Summary	•	•		•	•		
Credit Card Detail	•						
Drop Detail	•	•	•	•	•		
Drop Summary	•	•		•	•		
Enrollment History	•	•		•	•		
Gross Income Summary	•	•					
Income by Category	•	•		•	•		
Income by Department	•	•		•	•		
Income / Billing Summary	•	•		•	•		
Mailing Labels	•						
Missed Classes Summary	•	•		•	•		
Payment Receipts Log	•	•		•	•		
Referral Summary	•	•		•	•		
Sales Tax Summary	•	•					
Student Skills	•	•		•	•		
Student Summary	•	•	•				
Waiting List Summary	•	•		•	•		

Configuring ProSchool to *Your* School

–continued–

6. Select the **Actions** tab:



7. Select **Allow** or **Deny** as appropriate for the security profile you are configuring. As shown above, ProSchool offers seven permissions: changing passwords, setting up labels, posting payments, resetting student flags, applying account credits to unpaid charges, processing deposits and transactions, and processing drop no pays.

! By default, permissions are enabled for all screens, utilities, reports and actions. In addition, note that any user *not* specifically denied permission to the **Set Permissions** parameter in the **Security** section *can* change security clearance permission settings even if they are restricted elsewhere. **Make sure that any users you configure with anything less than full access are also denied permission to the Security section!**

! Note that unselecting **Enable security features?** does *not* alter the security parameters you set in the tabbed **Screes/Utilities**, **Reports** and **Actions** sections; they are retained until changed. However, remember that if you do disable the security features, *all* users have access to Student, Client, class and accounting data, *including the ability to make changes to that data.*

If you were modifying an existing security profile, and attempt to navigate to another area of the program, ProSchool notifies you that the changes will not take effect until next time the Program is launched:

Configuring ProSchool to *Your* School

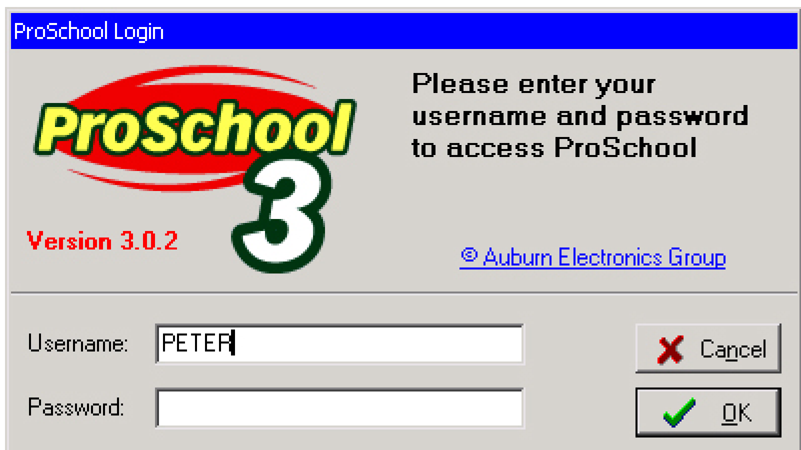
–continued–

Click **OK** to close the warning dialog box and **ProSchool Configuration** windows and return to the main **ProSchool** control panel.

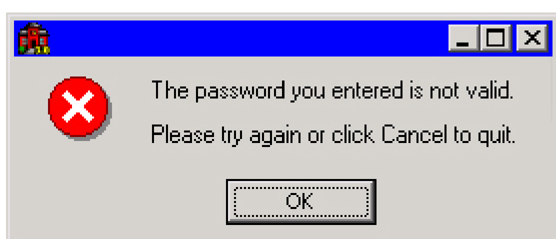
Hint: To change the user login at any time during a ProSchool session, simply click on the user name displayed in the lower right-hand corner of the main button bar:

The **ProSchool Login** *window (below) opens and allows you to change users. Just remember to change the user login back to that of the previous user if your are temporarily granting access to secure areas of the Program to a lesser user (as discussed in the beginning of this section).*

Once security is enabled and user names are configured, ProSchool requires a user to log in when the program is launched. The following login window appears on top of the ProSchool user interface:



If the correct username / password combination is entered, the **ProSchool Login** window disappears, allowing you to proceed. However, if the login is not recognized by ProSchool, entry is refused:



(Note: If **Cancel** is clicked in the **ProSchool Login** window, the program closes and must be relaunched.)

Setting Up Basic Codes

■ Basic Codes: An Overview

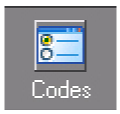
The various codes used in ProSchool enhance the program's flexibility and power. In this section you will create codes for class levels, class types, locations, teachers / managers, referrals and drop reasons. In a following section, "Configuring Tuition Codes and Discounts", you will create codes for your Tuition rates and billing categories.

Before inputting Clients, Students or classes, ProSchool requires you to define a basic set of codes for use in that input process.

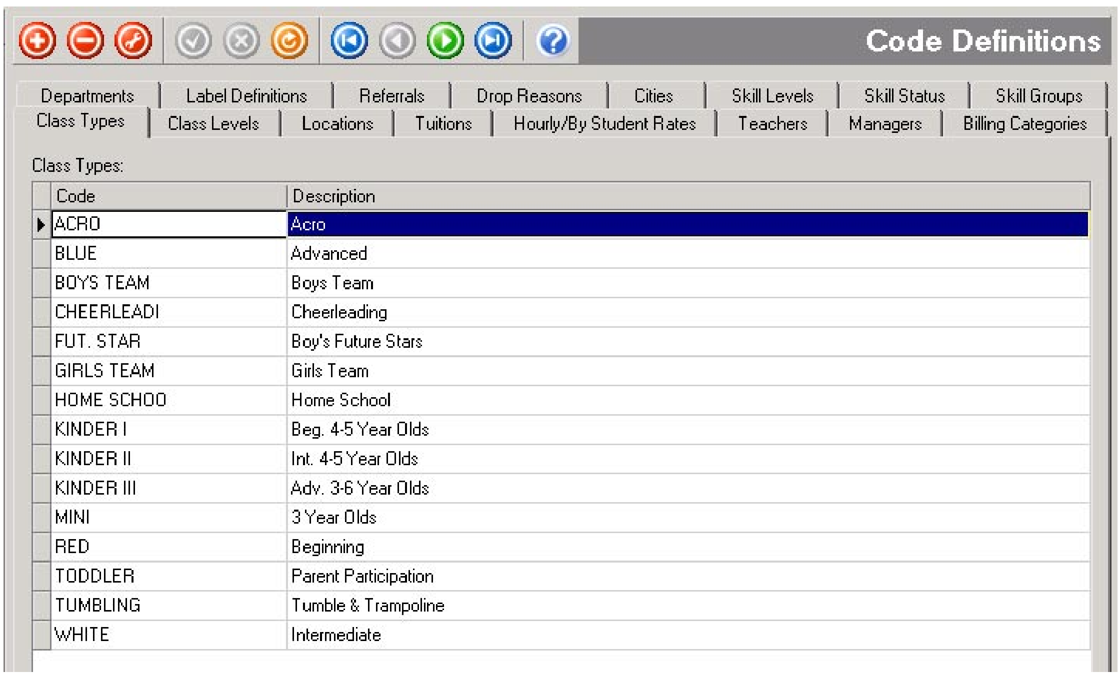
Hint: If your school operation is small or you just wish to start off simply with a minimal amount of codes, you only have to use a single code for each category. For example, if your school is located in Sacramento and you only have one facility, you could use "SA" for your location code.

To configure your school's codes:

1. Click **Setup** (located in the top of the vertical menu button bar on the left of the screen).

2. Click 

(the **Codes** menu button) to open the **Code Definitions** panel:



These are the codes you'll be able to configure in ProSchool:

- Class Types • Class Levels • Locations • Tuitions • Hourly / By Student Rates
- Teachers • Managers • Billing Categories • Departments • Label Definitions
- Referrals • Drop Reasons • Cities • Skill Levels • Skill Status • Skill Groups

It's easy to be overwhelmed by the many different codes, but we'll take it one step at a time. It won't be long before you feel comfortable configuring ProSchool codes and using them to make your job easier!

On the following pages, you'll learn about the various codes and how to configure them.

Setting Up Basic Codes

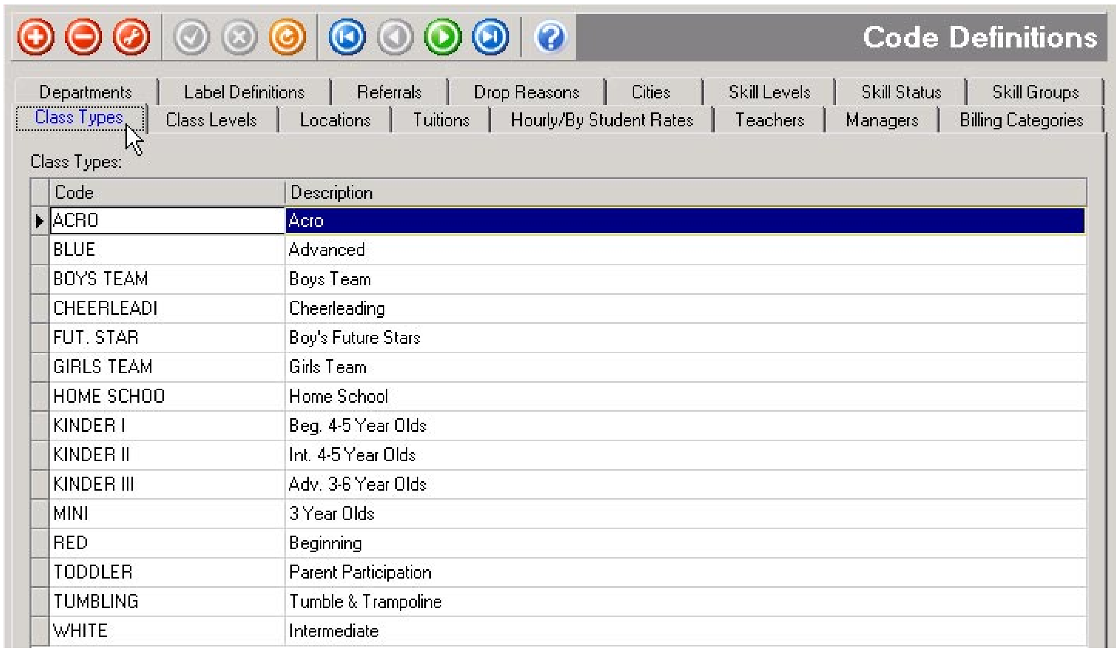
-continued-

CLASS TYPE CODES

Class Types are the same as subjects. For example, in a gymnastics setting you might use “tumbling”, “ballet”, “mod dance” for modern dance, and so forth.

To configure Class Types for your school:

1. From within the **Code Definitions** section, click on the **Class Types** tab to open the **Class Types** panel:



Code	Description
ACRO	Acro
BLUE	Advanced
BOYS TEAM	Boys Team
CHEERLEADI	Cheerleading
FUT. STAR	Boy's Future Stars
GIRLS TEAM	Girls Team
HOME SCHOO	Home School
KINDER I	Beg. 4-5 Year Olds
KINDER II	Int. 4-5 Year Olds
KINDER III	Adv. 3-6 Year Olds
MINI	3 Year Olds
RED	Beginning
TODDLER	Parent Participation
TUMBLING	Tumble & Trampoline
WHITE	Intermediate

The various Class Types codes above represent an active and diverse gymnastics operation, but they can of course be titled anything you wish.

2. To enter a new Class Type code, click (the “add a new record” button). Note that when you do click this button, the status at the bottom of the window changes from “**Browsing**” to “**Inserting**”.)

3. Enter a code up to 10 characters long in the **Code** field.

4. Enter a description of the code up to 30 characters long in the **Description** field.

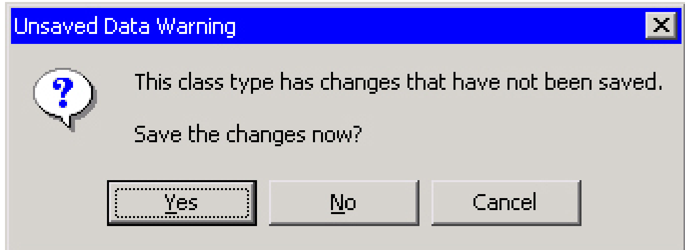
5. Click (the “save” button) to save your entry.

6. If you want to enter another class type code, you don’t even need to click the save button first—just click to save your current entry *and* blank out the fields for a new entry.

7. To edit a Class Type, simply place the cursor in the field you wish to edit and enter your changes, or click (the “edit” button).

8. If you are in the middle of adding or editing a record and want to cancel your changes, click  (the “cancel changes” button) to abandon your current changes.

As elsewhere in ProSchool, if you try to exit without first saving your most recent entry a confirmation dialog box will appear to clarify your intentions:



Click **Yes** to save your most recent entry and proceed, **No** to proceed without saving your most recent entry, or **Cancel** to return to the previous window.

Note: In this section, we’ve covered the basics of how to add codes, which buttons do what, etc. In the following sections, we’ll only focus on the various codes and how they’re used. The process of adding, editing and deleting codes are the same as presented above, regardless of which code you are using.

Setting Up Basic Codes

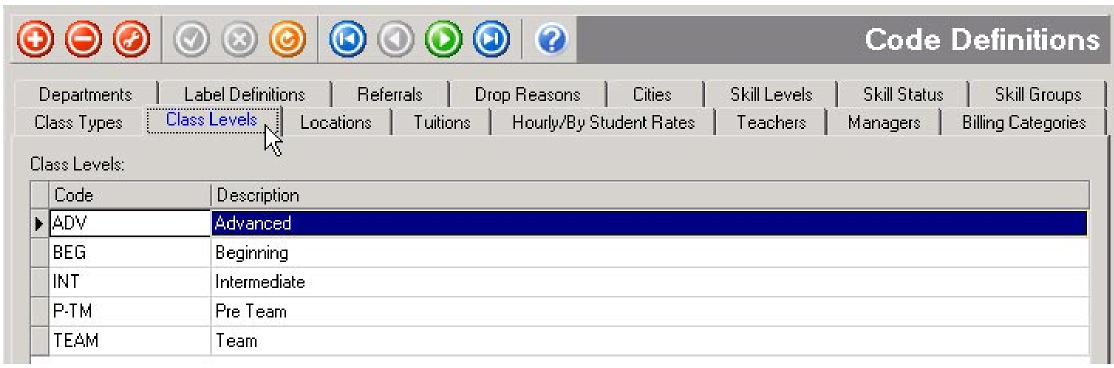
-continued-

CLASS LEVEL CODES

Class level codes include designations such as introductory (“INTR”), beginning (“BEG”), intermediate (“INTM”), advanced (“ADV”), or others such as “LVL5”, “BOY2”, etc.

To configure class level codes for your school:

1. From within the **Code Definitions** section, click on the **Class Levels** tab to open the **Class Levels** panel:



2. Add, edit or delete Class Level codes by using the various icon buttons (as described in the previous subsection entitled “Class Type Codes”).

Note that the **Code** field accepts codes of up to four characters in length, and the **Description** field accepts descriptions of up to 30 characters long.

3. Remember to click to save your entry when you are done.

Setting Up Basic Codes

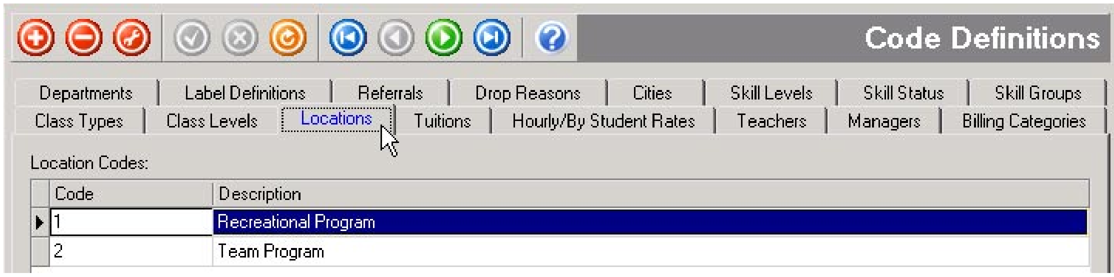
-continued-

■ LOCATION CODES

Location codes designate where classes and lessons are held. You can establish codes for different locations, such as multiple gyms, or even different rooms in the same building.

 **To configure Location Codes for your school:**

1. Click on the **Locations** tab to open the **Locations** panel:



2. Add, edit or delete Location codes by using the various icon buttons (as described in the previous section entitled “Class Type Codes”).

Note that the **Code** field accepts codes of up to two characters in length, and the **Description** field accepts descriptions of up to 30 characters long.

3. Remember to click  to save your entry when you are done.

Setting Up Basic Codes

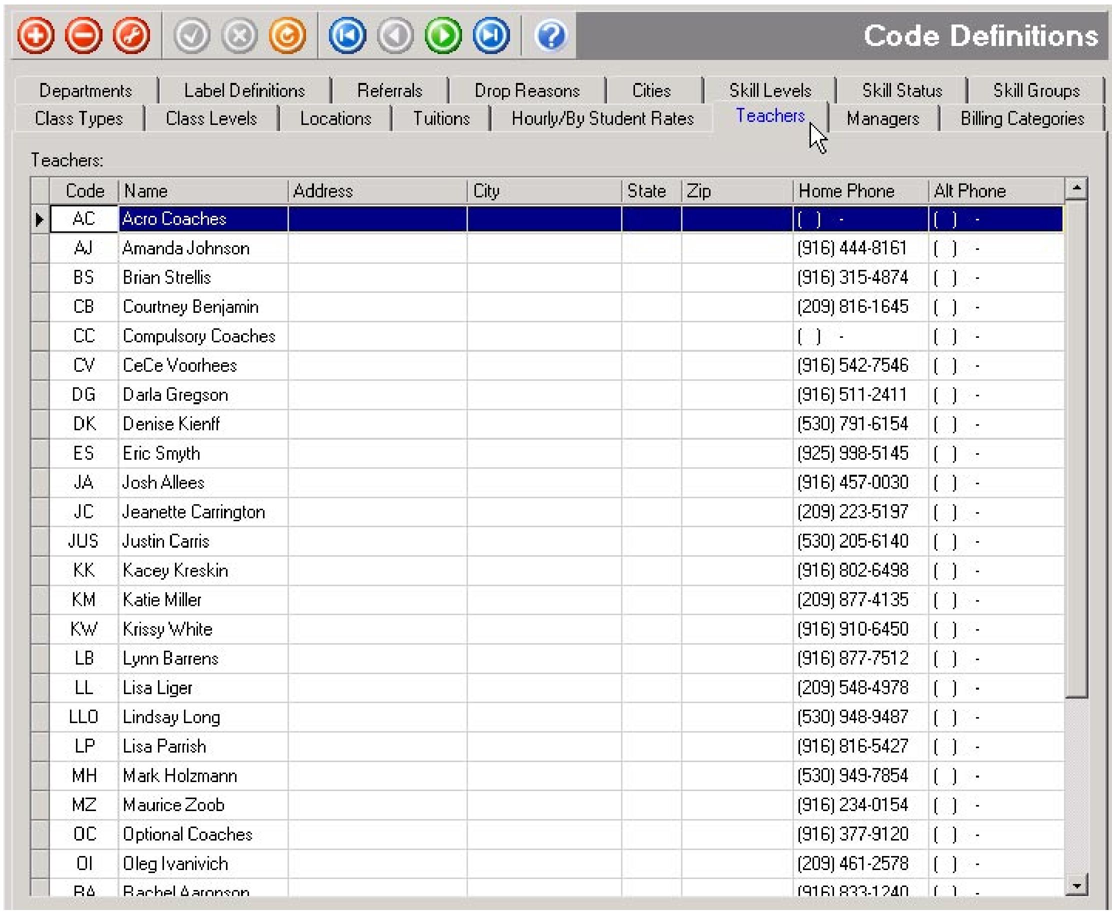
TEACHER CODES

Teacher codes identify the school's various teachers and instructors.

To configure Teacher codes:

1. Click on the **Teachers** tab to open the **Teachers** panel:

-continued-



Code	Name	Address	City	State	Zip	Home Phone	Alt Phone
AC	Acro Coaches					( ) -	( ) -
AJ	Amanda Johnson					(916) 444-8161	( ) -
BS	Brian Strellis					(916) 315-4874	( ) -
CB	Courtney Benjamin					(209) 816-1645	( ) -
CC	Compulsory Coaches					( ) -	( ) -
CV	CeCe Voorhees					(916) 542-7546	( ) -
DG	Darla Gregson					(916) 511-2411	( ) -
DK	Denise Kienff					(530) 791-6154	( ) -
ES	Eric Smyth					(925) 998-5145	( ) -
JA	Josh Allees					(916) 457-0030	( ) -
JC	Jeanette Carrington					(209) 223-5197	( ) -
JUS	Justin Carris					(530) 205-6140	( ) -
KK	Kacey Kreskin					(916) 802-6498	( ) -
KM	Katie Miller					(209) 877-4135	( ) -
KW	Krissy White					(916) 910-6450	( ) -
LB	Lynn Barrens					(916) 877-7512	( ) -
LL	Lisa Liger					(209) 548-4978	( ) -
LLO	Lindsay Long					(530) 948-9487	( ) -
LP	Lisa Parrish					(916) 816-5427	( ) -
MH	Mark Holzmann					(530) 949-7854	( ) -
MZ	Maurice Zoob					(916) 234-0154	( ) -
OC	Optional Coaches					(916) 377-9120	( ) -
OI	Oleg Ivanivich					(209) 461-2578	( ) -
RA	Rachel Aaronson					(916) 833-1240	( ) -

2. Add, edit or delete Teacher codes by using the various icon buttons (as described in the previous subsection entitled "Class Type Codes"). You can also enter additional teacher information (address and phone numbers) if you wish, though that is optional.

The field lengths are as follows: **Code** (3), **Name** (30), **Address** (30), **City** (20), **State** (standard two letter abbreviation), **Zip** (10, ZIP+4), **Home Phone** and **Alternate Phone** (standard 10-digit phone number for each).

3. Remember to click to save your entry when you are done.

Setting Up Basic Codes

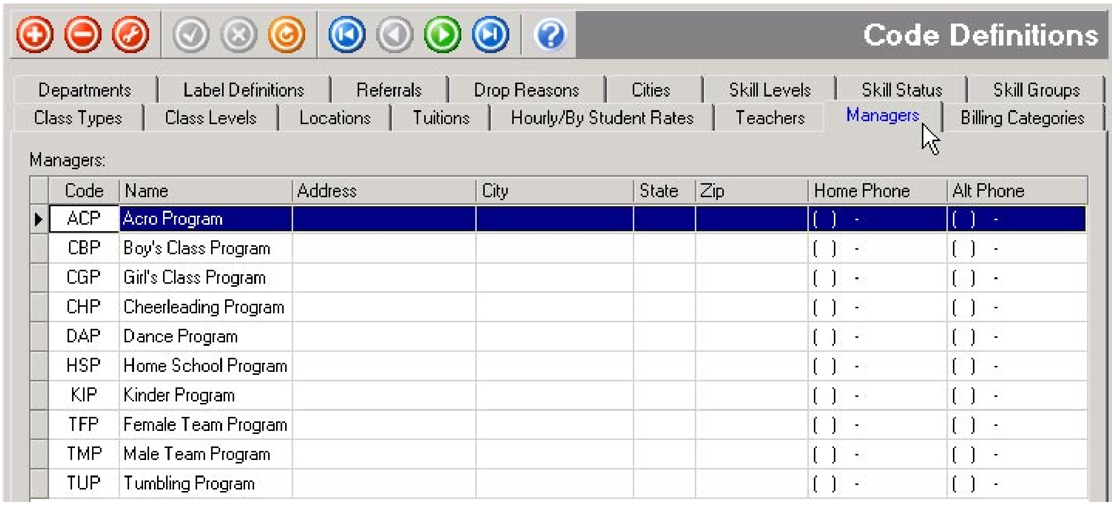
-continued-

■ MANAGER CODES

Manager codes identify the school's various managers, either by name, or by title (as shown in the example below). Which you choose is entirely up to you.

To configure Manager codes:

1. Click on the **Managers** tab to open the **Managers** panel:



2. Add, edit or delete Manager codes by using the various icon buttons (as described in the previous subsection entitled "Class Type Codes"). If you choose to use manager names (as opposed to titles) you can also enter additional information (address and phone numbers) if you wish, though that is optional.

The field lengths are as follows: **Code** (3), **Name** (30), **Address** (30), **City** (20), **State** (standard two letter abbreviation), **Zip** (10, ZIP+4), **Home Phone** and **Alternate Phone** (standard 10-digit phone number for each).

3. Remember to click ✓ to save your entry when you are done.

Setting Up Basic Codes

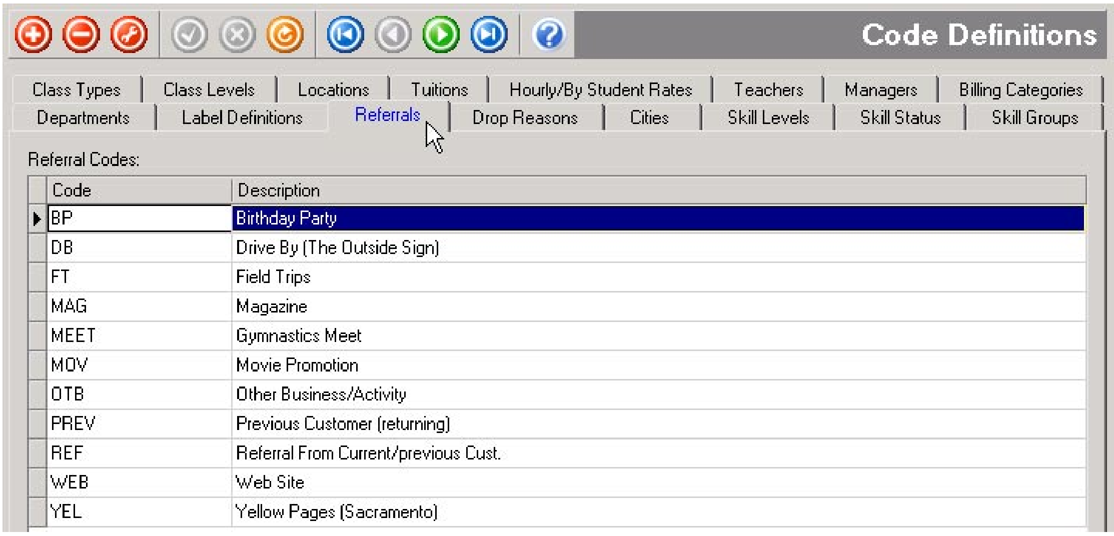
-continued-

■ REFERRAL CODES

ProSchool allows you to track referrals with simple codes. This gives you an easy way to tell "at a glance" where your Students came from and how they found out about your school.

To configure Referral codes:

1. Click on the **Referrals** tab to open the **Referrals** panel:



2. Add, edit or delete Referral codes by using the various icon buttons (as described in the previous subsection entitled "Class Type Codes").

Note that the **Code** field accepts codes of up to four characters in length, and the **Description** field accepts descriptions of up to 40 characters long.

3. Remember to click [save button icon] to save your entry when you are done.

Setting Up Basic Codes

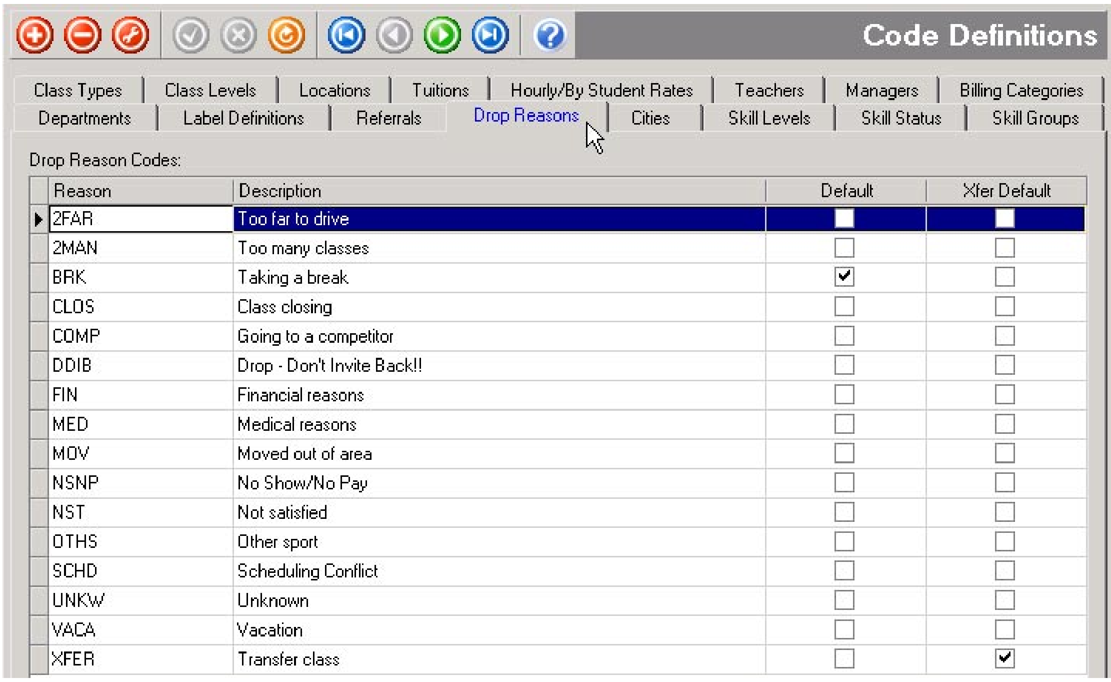
-continued-

■ DROP REASON CODES

Drop Reason codes give you a concise and discrete means of tagging all Students dropped from your school.

To do this:

1. Click on the **Drop Reasons** tab to open the **Drop Reasons** panel:



2. Add, edit or delete Drop Reason codes by using the various icon buttons (as described in the previous subsection entitled "Class Type Codes").

Note that the **Code** field accepts codes of up to four characters in length, and the **Description** field accepts descriptions of up to 30 characters long.

3. You can specify which code you would like ProSchool to assign by default to a dropped student. Check the box in the **Default** column for the code you would like ProSchool to use as a default Drop Code.

4. For transferred students, you can specify which drop code you would like ProSchool to assign by default to a **transferred** drop student. Check the box in the **Xfer Default** column for the code you would like ProSchool to use as a default Drop Code for student transfers.

5. Remember to click  to save your entry when you are done.

Setting Up Basic Codes

-continued-

■ City Codes

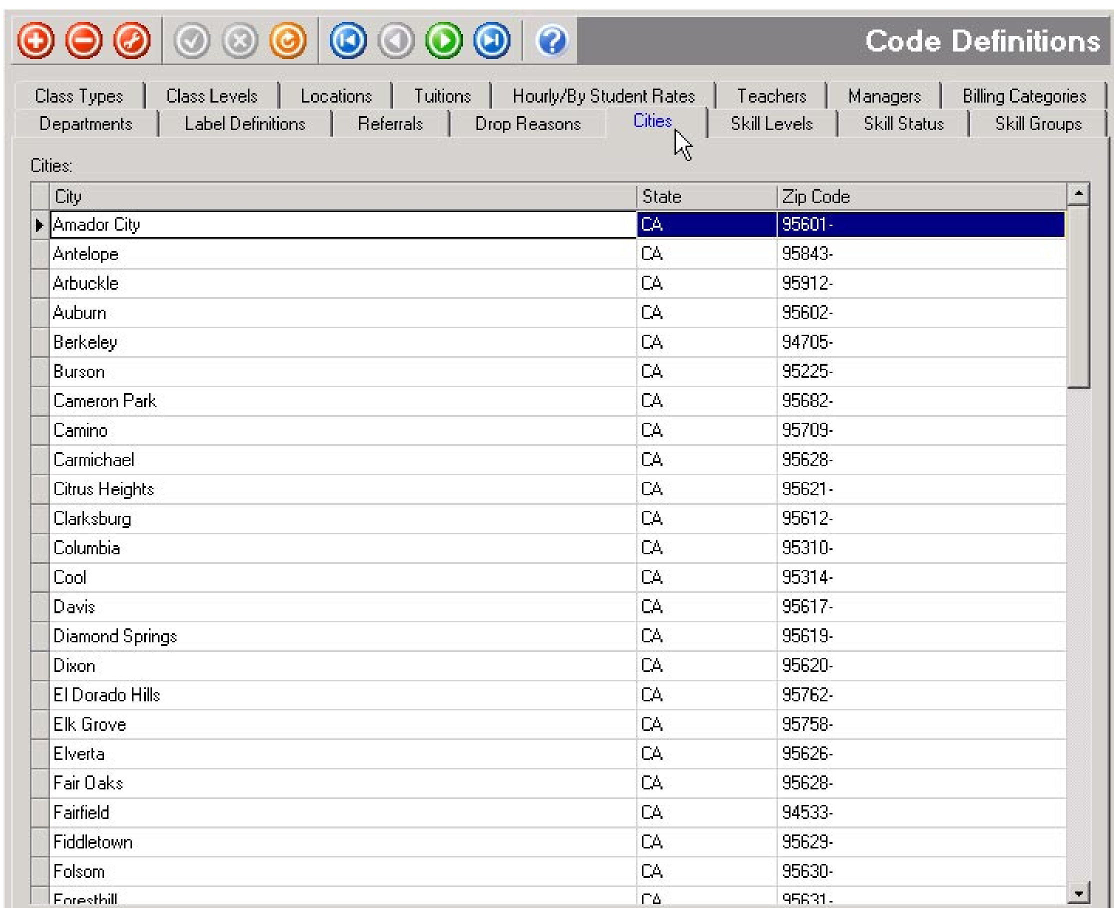
City codes save you time during Client input by automatically completing the entry for any recognized city. ProSchool does so by comparing input to all city names previously loaded into the cities database through the **Client Information** and **City Setup** windows (explained below in this section).

Here's how it works: any time you input a city name in the Client Entry screen, ProSchool "autocompletes" the name of the city for you as soon as it matches the spelling, and does so as you type. For example, if "Sacramento" is in your cities database, ProSchool will autocomplete the entry as soon as you type the "S" (below, left). If you have additional cities starting with "S", such as "Shingle Springs", the autocomplete function will continue to match them as you continue typing the city name. As soon as the autocomplete function enters the appropriate name—such as the "Sh" for "Shingle Springs"—your entry is completed even if you don't type in the whole name yourself (below, right):

You can build your cities database by using one of two methods: through the **Cities** panel in the **Code Definitions** section (as we've done for the last several code types, and as demonstrated immediately below).

To create city codes in the Code Definitions section:

1. Click on the **Cities** tab to open the **Cities** panel:



Setting Up Basic Codes

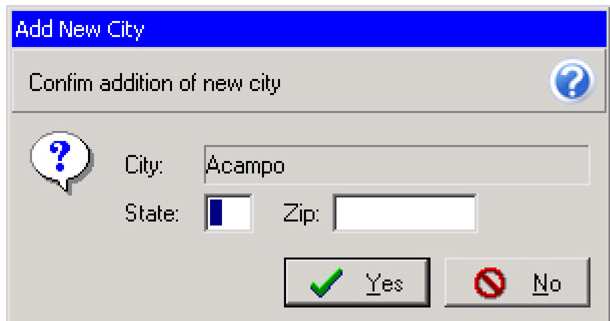
2. Add, edit or delete City codes by using the various icon buttons (as described in the previous subsection entitled “Class Type Codes”).

The field lengths are as follows: **City** (20), **State** (standard two letter abbreviation), **Zip** (10, ZIP+4).

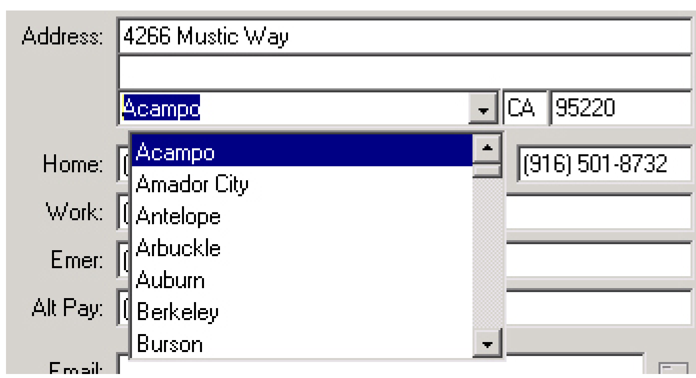
3. Remember to click  to save your entry when you are done.

-continued-

When in the **Family Information** window, it’s mostly automatic. If you enter the name of a city that ProSchool doesn’t have saved in its cities database, then click on another field to continue, the **Add New City** window opens:



You would then enter the state and zip codes in their respective fields and click **Yes** to save this city (and its related state and zip code) to ProSchool’s cities database. (Clicking **No** cancels the new city / state / zip entry and returns you to the previous **Address** section.) After a city is added to the database (along with its state and zip code), you can access the database by clicking on the down-arrow at the right of the “city” field to open the city menu:



Setting Up Basic Codes

-continued-

SKILL CODES

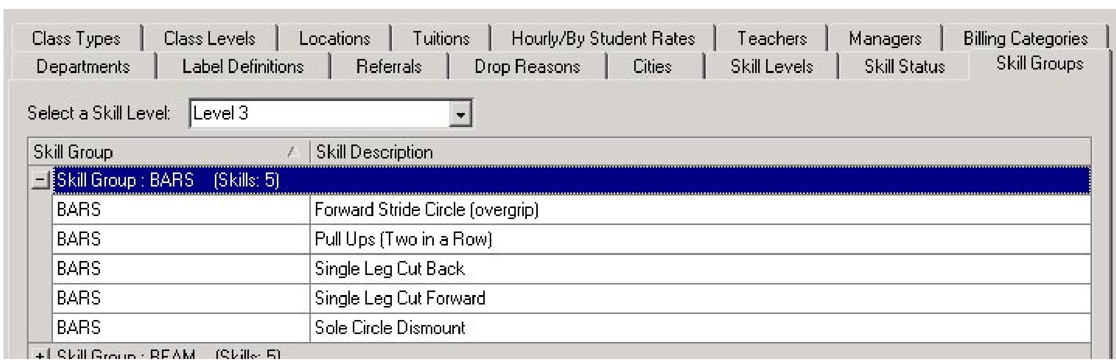
ProSchool allows you to organize and classify Students through the use of “Skill” codes, as follows:

- Skill **Level** codes define general categories relating to a Student’s general level of proficiency in a given craft or discipline (for example, “Beginning”, “Intermediate”, “Advanced”, etc.);
- Skill **Group** codes define a specific skill *within the context of a specific level;*
- Skill **Status** codes define a Student’s status with respect to a specific skill (for example, “Almost There”, “Attempted”, “Completed”).

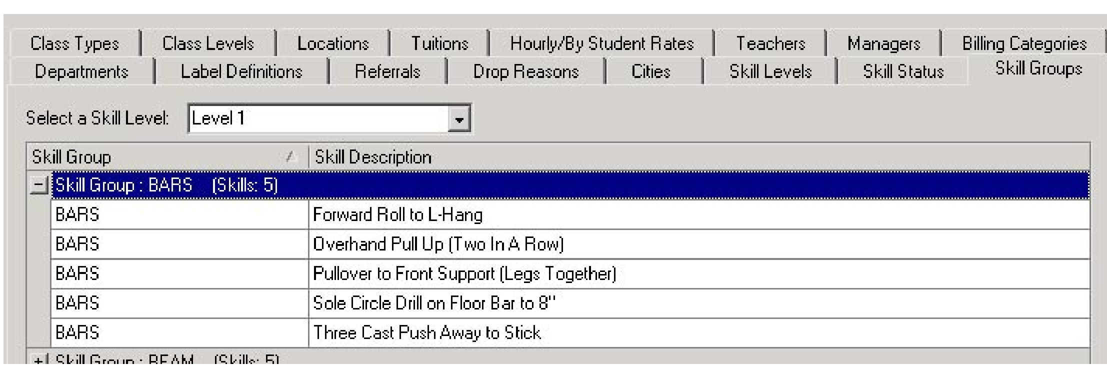
As you can see from the examples above, Skill *Level* and Skill *Status* codes are more general in nature. On the other hand, because Skill Groups are contextual (i.e. their definition is based partly on Skill Levels you will already have defined), they can be configured to allow a great deal of specificity with respect to how you classify your Students, and how you define the “mileposts” that determine their progress.

For example, a school with the Skill Level and Skill Status codes outlined above (three each) could easily have 100 to 300 skill groups defined. In a gymnastics setting, the skills utilized on the parallel bars would be different for *advanced*-level Students than they would be for *intermediate*-level Students, and those skills for *beginner*-level Students would be different still.

Consider the following Skill Groups for a gymnastics school, specifically for “bars”, and composed only of Advanced Students (“Level 3”):



This Skill group consists of several *individual* skills that are unique to this Skill level. To further illustrate this, let’s look at the Skill group for the “bars” again, but for Beginning (“Level 1”) Students:



This Skill group (Level 1) also consists of several individual skills, but note they are *different* than those for Level 3.

Setting Up Basic Codes

-continued-

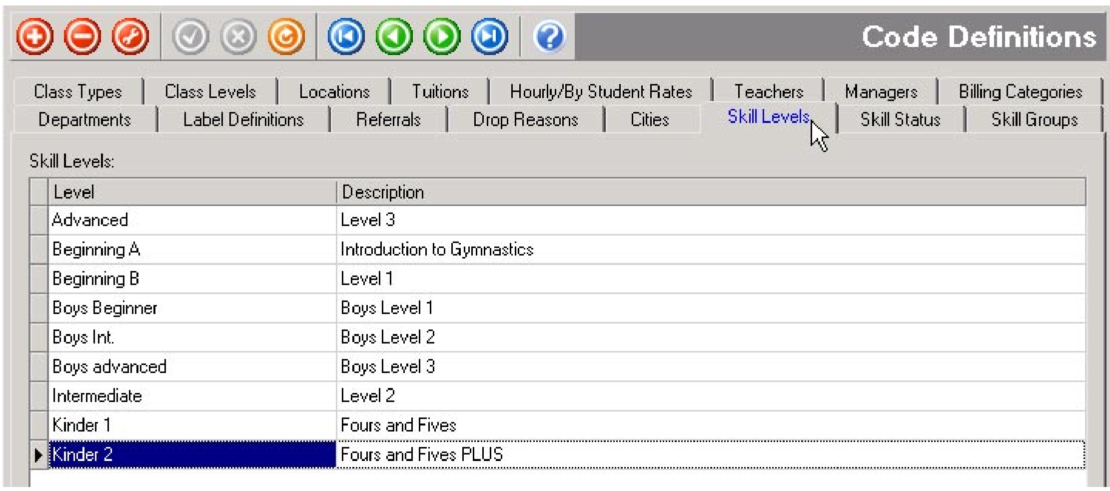
Your school may be structured differently, but the key concept is to think first in terms of Skill **levels**, then in terms of the skills that are unique to that level (Skill **groups**).

The final component is the Skill *status* (“almost there”, “attempted”, “completed”), which defines a Student’s progress with a specific skill.

Note that ProSchool allows you to define these codes if and when you are ready to do so. Furthermore, you don’t have to define and use all three skill codes. For example, some schools use a single skill level code (for example, “Skill Levels”); some use two skill level codes, and some, all three. As you become more familiar with ProSchool’s power and potential, your use of skill codes will likely grow as well.

To configure Skill LEVEL codes for your school:

1. From within the **Code Definitions** section, click on the **Skill Levels** tab to open the **Skill Levels** panel:



The skill levels shown above are examples of those you might use, though they can be titled anything you want.

2. Add, edit or delete Skill Level codes by using the various icon buttons (as described in the previous subsection entitled “Class Type Codes”).

Note that the **Level** field accepts codes of up to 15 characters in length, and the **Description** field accepts descriptions of up to 40 characters long.

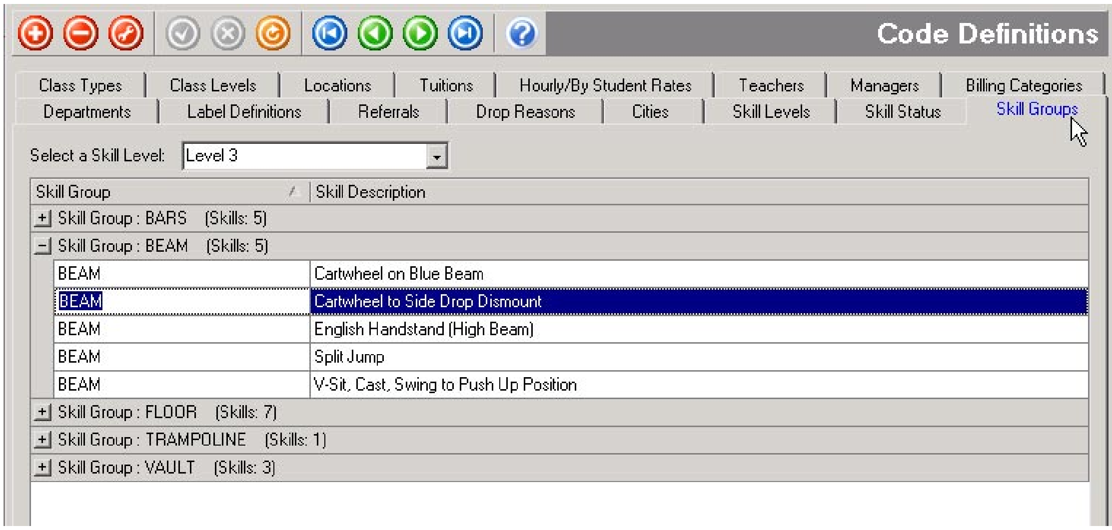
3. Remember to click  to save your entry when you are done.

Setting Up Basic Codes

-continued-

To configure Skill GROUP codes for your school:

1. From within the **Code Definitions** section, click on the **Skill Groups** tab to open the **Skill Groups** panel:



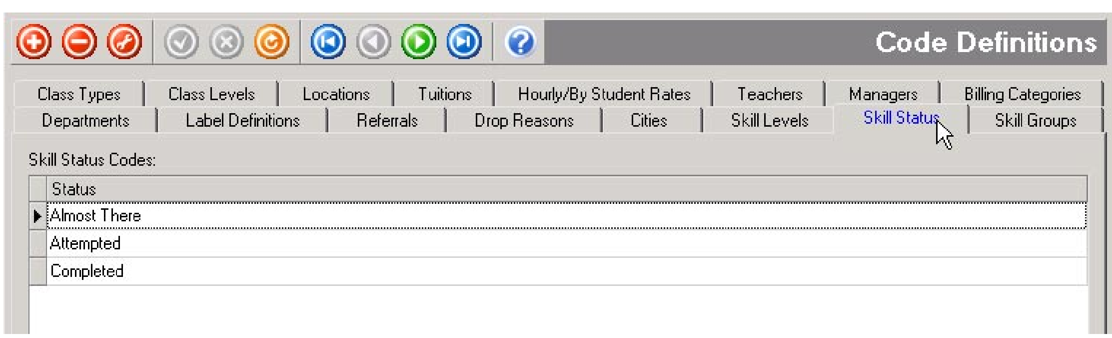
2. Add, edit or delete Skill Group codes by using the various icon buttons (as described in the previous subsection entitled "Class Type Codes").

Note that the **Group** field accepts codes of up to 15 characters in length, and the **Description** field accepts descriptions of up to 80 characters long.

3. Remember to click to save your entry when you are done.

To configure Skill STATUS codes for your school:

1. From within the **Code Definitions** section, click on the **Skill Status** tab to open the **Skill Status** panel:



2. Add, edit or delete Skill Status codes by using the various icon buttons (as described in the previous subsection entitled "Class Type Codes").

Note that the **Status** field accepts codes of up to 15 characters in length.

3. Remember to click to save your entry when you are done.

Setting Up Basic Codes

-continued-

CREATING LABELS IN PROSCHOOL

ProSchool features an extremely versatile label printing facility, which is accessed in the **Code Definitions** section via the **Label Definitions** tab. Each label design is assigned a four-digit “label definition” code for quick identification.

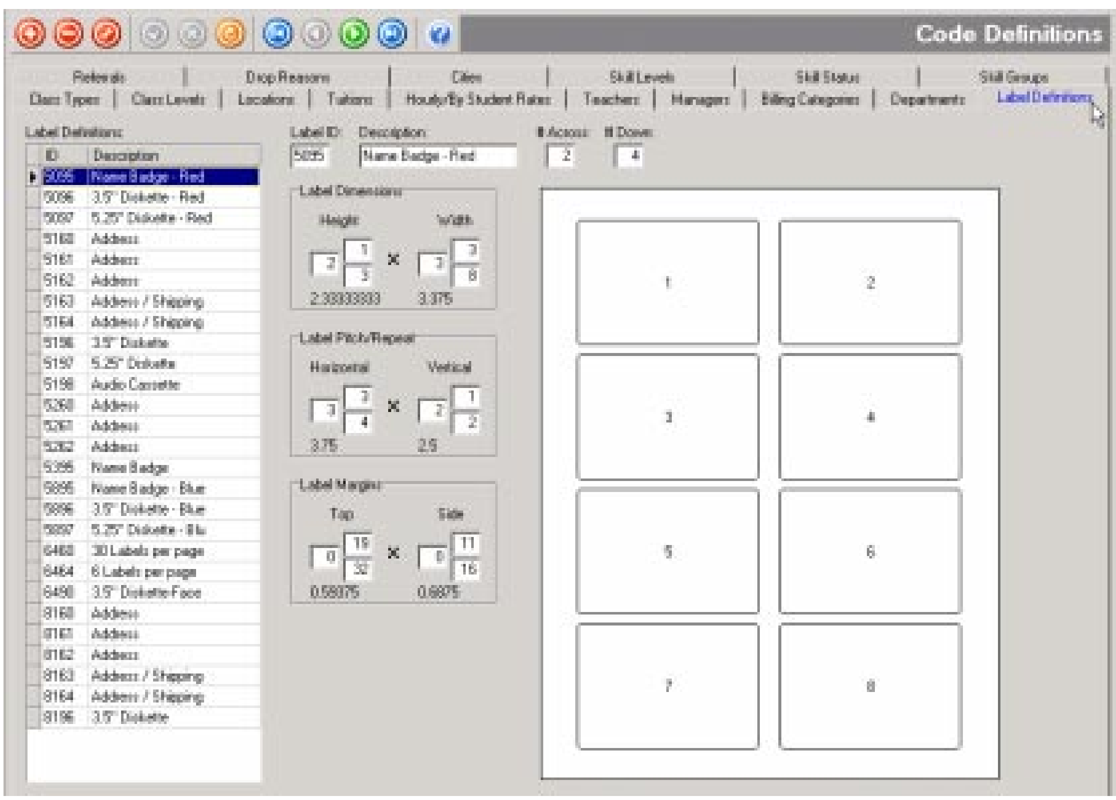
For your convenience, most of ProSchool’s 27 label definitions, including the design style numbers, are based on popular 8½” x 11" die-cut sheet label stock (“15 labels / sheet”, etc.) available from Avery / Dennison at better office supply stores. This makes it very easy to print out labels and can be a real time saver.

ProSchool’s 27 different label designs make it possible that you’ll find the label design you need right out of the box. However, you are not limited to these designs—ProSchool allows you to modify the existing designs to suit your needs. Then, if you wish, you can give your new label design a new label definition code (which preserves the original style on which your modified design is based).

Note that ProSchool’s label “definitions” establish a label’s size and boundaries only. The layout of the printed information *within* the label boundaries is a separate issue, and is accomplished by using ProSchool’s “Label Setup Utility” (which is covered in the next section).

To configure Label Definition codes for your school:

1. From within the **Code Definitions** section, click on the **Label Definitions** tab to open the **Label Definitions** panel:



The menu on the left shows the various label definitions. The center section allows you to set exact dimensional parameters (dimensions, pitch / repeat, margins), how many labels print across and down the sheet, etc. The right section shows you how the printed sheet will appear.

Setting Up Basic Codes

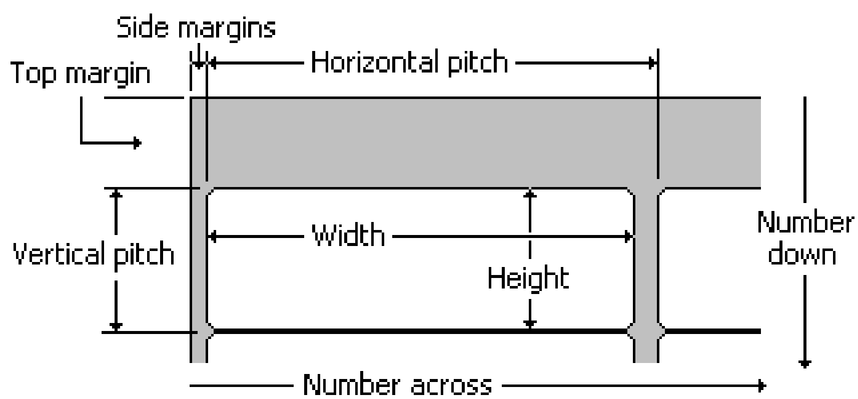
-continued-

2. Select a label definition in the **ID/Description** section. The label's ID code and specifications will appear in the various fields in the center section. Here is what they mean and how to modify them to suit your purposes:

- The **Label ID:** and **Description:** fields identify the currently selected label definition;
- The **# Across:** field refers to how many labels *wide* your label sheet stock is;
- The **# Down:** field refers to how many labels *tall* your label sheet stock is;
- The **Label Dimensions** section contains the gross (absolute) outside dimensions of a *single* label;
- The **Label Pitch/Repeat** section specifies two dimensions that call out how much space the printer advances before printing a "repeat" impression of an adjacent label:
  - **Horizontal** is the dimension from the left or right edge of one column of labels to the same edge on the *next* column of labels;
  - **Vertical** is the dimension from the top or bottom edge of one row of labels to the same edge on the next row of labels;
- The **Label Margins** section specifies two dimensions: **Top** is from the top edge of the sheet down to the top die-cut edge of the top row of labels. **Side** is from the left edge of the sheet to the left-most die-cut edge of the left-most column of labels.

Note that most of ProSchool's label definitions have the same dimension for **Label Dimension – Height** as for **Label Pitch – Repeat**. When this is *not* the case, the dimension specified in **Label Pitch – Repeat** will always be the greater of the two, if only slightly. This slight excess in the "repeat" dimensions allows for the width of the die-cut "gutter" (the strip that runs vertically between adjacent columns of labels on certain label sheet stock).

The following diagram illustrates the various dimensions of labels and how they relate to each other:



3. If you modify a particular label design, you can save it under a unique name (i.e., "definition code"). Enter the new label ID number in the **Label ID:** field and an appropriate description in the **Description:** field, then click  to save your new label design.

4. If you want to start from scratch and design a label that's not based on an existing design (either your own or one of ProSchool's), just click  to clear all the fields, and build your own unique design.

5. Click  to save your new design with its own unique label definition code.

Setting Up Basic Codes

-continued-

? **"...Yikes!?! What if I don't want to mess around with modifying label definitions? Is there an easier way?"** Yes. For most users, ProSchool's standard 27 label definitions will provide everything necessary for just about any label need. Most of these definitions, including the design style numbers, are based on popular 8½" x 11" die-cut sheet label stock ("15 labels / sheet", etc.), available from Avery / Dennison at better office supply stores. And if all this discussion of label definitions seems complicated, don't worry about the details—just use the labels that suit your needs for now. Then, as you become more familiar with ProSchool label definitions, you may wish to modify them or add your own at a later time.

Setting Up Basic Codes

■ ADDING STYLE TO YOUR LABELS - FONT STYLES AND SIZES

The previous section dealt with the size and dimensions of labels. But ProSchool also gives you latitude in the appearance of the printed information by enabling you to adjust the font style and font sizes in which the printed information appears.

To set up labels with the Label Setup utility:

-continued-

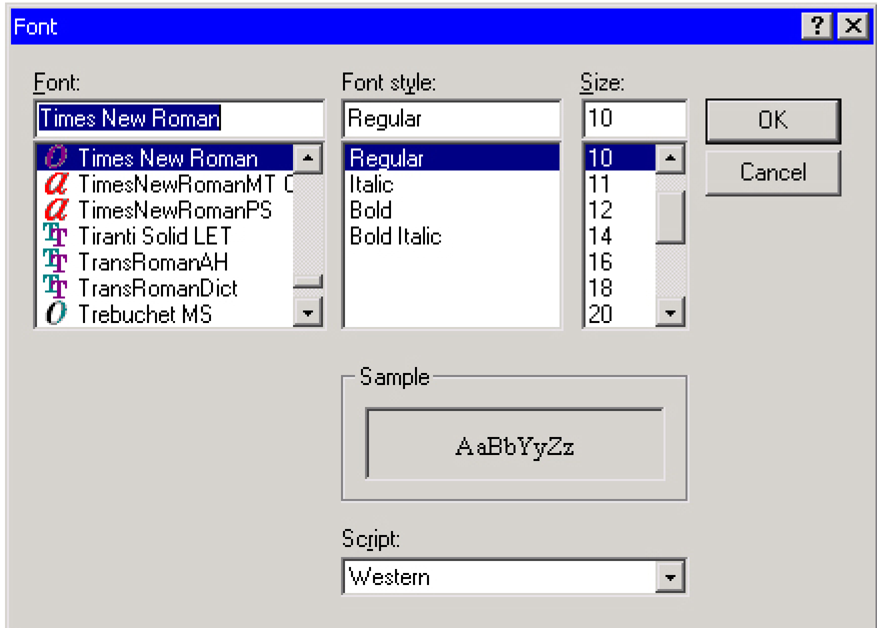
1. On the main menu bar, click on the **Main** pull-down menu and select **Label Setup** to open the **Label Setup** window:

2a. Click on the down-arrow in the **Label ID:** field to access the drop-down menu. Any label definition you select will appear in the **Label Setup** window when highlighted.

Hint: To scroll *through the various labels in the* **Label ID:** *window and display each in the* **Label Setup** *window when highlighted, try using the UP/DOWN keys. This allows you a rough comparison of the various label definitions, their relative size and layout differences (the left portion of the label will be covered by the drop-down menu, but you'll be able to see enough of the label design to get a general sense of its size in comparison to the others).*

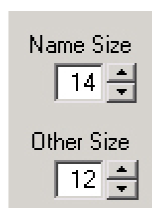
2b. To *select* a label definition, click on it with the mouse, or highlight it using the up / down keys and hit ENTER. That label definition will be displayed.

3. To change the typeface, click **Font** to open the **Font** window:



Select the font you wish in the **Font:** field. Your choices will be displayed in the **Sample** section. When you are done, click **OK** to implement the changes and return to the **Label Setup** window.

4. To change the font size for the addressee's *name* line, click the up- and down-arrows in the **Name Size:** field to select the size you wish (or key in the font size manually):



5. To change the font size for the addressee's *address* lines, click the up- and down-arrows in the **Other Size:** field (shown above) to select the size you wish (or key in the font size manually).

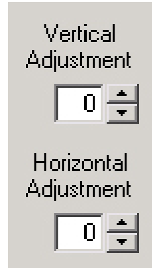
6. To print a test label, use a clean sheet of white bond paper (not label stock!), load it into your printer and click **Test**. ProSchool will print one sheet of the label specified in the **Label ID:** field. You don't have to worry about entering name and address data—ProSchool uses generic entries for the test print.

7. After printing, place the printed sheet behind a clean sheet of label stock, align the edges and hold the two sheets up to a bright light. You should be able to make out the printed characters through the label sheet well enough to determine the alignment (which is the relationship between the edges of the labels and the text placement).

Setting Up Basic Codes

-continued-

8. If the print alignment is off, adjust it by changing the values in the **Vertical Adjustment** and **Horizontal Adjustment** fields as necessary (either by clicking the up- and down-arrows to arrive at the desired value, or manually keying in offset values):



An increment of one equals 1/32", so these common values would translate as follows:

2 = 1/16"	**4** = 1/8"	**6** = 3/16"	**8** = 1/4"
10 = 5/16"	**12** = 3/8"	**14** = 7/16"	...and so on.

The above examples use positive values; for negative values, precede the value with a "**–**" (minus) sign, found on the numeric keypad on the right of your keyboard—or use a dash. The maximum offset value is **99**; the maximum negative offset is **–99**. Experiment with raising or lowering the values to get the proper alignment as follows:

- *horizontal* alignment – positive values move the text right; negative values move the text left—a value of **8** would move the text right by ¼"; a value of **–8** moves it left by ¼".
- *vertical* alignment – positive values move the text down; negative values move the text up—a value of **8** would move the text down ¼"; a value of **–8** would move it up ¼".

9. When you are finished selecting print parameters for the selected label definition, click **OK** to accept the changes and close the **Label Setup** window.

Hint: Remember... The above **Label Setup** *window deals with the selection, overall alignment and type characteristics of your labels. The* **Label Definition** *window, explained in the previous section, deals with the actual* design *and* modification *of labels.*

Getting to Know ProSchool Tuitions and Discounts

Understanding Tuition Codes

Tuition codes determine how your Clients will be billed. ProSchool allows a great deal of flexibility with respect to the variety of rate schedules and discounts that can be configured. First, however, you must understand how the Program defines and uses these differing codes for tuitions and tuition discounts.

There are two components to the configuration of tuitions:

- the rate you charge for a given class, and;
- the basis on which it is computed.

Both are completely up to you. The rate is whatever you feel appropriate, and the basis can be any one of the following:

- monthly;
- weekly;
- by the session (a "session" being several hours, classes, weeks... it's up to you);
- by the hour (regardless of class type, level or number of classes enrolled in);
- by the Student (charged on a per- or by-Student basis regardless of the number of classes taken).

In ProSchool, this combination is referred to as the **tuition code**. Think of it this way:

[rate] x [basis] = **tuition code**

Every class offered by your school is assigned a tuition code by you when you build your classes in the **Class Information** section (discussed in a later section entitled ("Setting Up Your School's Classes"). For example, your tuition codes could be configured to:

- charge the same tuition rate for all classes on a weekly basis;
- charge differing tuition rates for different classes on a monthly basis;
- charge on a per-Student basis, using differing rates based on the level of class difficulty;
- charge tuitions based on numerous variations of the above three examples.

ProSchool lets you customize the way you charge for classes in an almost infinite variety of ways. As with other aspects of the Program, you can start simply with one or just a handful of tuition codes, then develop additional ones later as your needs dictate.

Furthermore, all five of the above tuition code schemes can be configured to charge at a "level" rate—that is, no discount (the simplest tuition rate scheme). Or, you can configure any number of discount schemes to be factored into your various tuition codes (discussed next).

Getting to Know ProSchool Tuitions and Discounts

-continued-

Understanding Tuition Discounts

ProSchool offers you the flexibility of configuring discounts in any of several ways. For example, you can factor in discounts for situations such as:

- one Student enrolled in “similar” classes (that is, classes with the *same* tuition rate code);
- multiple Students from a single Family;
- lots of class hours (one Family with either one or multiple Students enrolled);
- volume discounts (monthly / session / weekly or sibling), by percentage or dollars off.

What sets these different tuition and discount schemes apart, aside from the obvious time frames, is *how* they are discounted:

OPTION ❶ You can use **Monthly**, **Weekly** or **Session** tuition codes configured so that a Student enrolled in “similar” classes (other classes using the *same* tuition rate code), will receive a discounted tuition rate.

OR...

OPTION ❷ You can use **Hourly** tuition rate codes to configure a tiered (stepped) rate schedule wherein the hourly rate discount for *all* classes taken is determined solely by the number of *class hours* that one or more Students from a single Family are enrolled in. This sliding scale is entirely up to you.

OR...

OPTION ❸ You can use **By Student** tuition rate codes to configure a tiered rate schedule wherein the discount for *all* classes taken is determined solely by the *number of Students* from a single Family. As with Hourly rates, this sliding rate scale is determined precisely by you.

(If you want to use the Hourly and By Student tuition schemes, you will need to create additional codes establishing the rate scales for them. That is covered below in more detail.)

Getting to Know ProSchool Tuitions and Discounts

-continued-

FACTORING IN "GLOBAL" DISCOUNTS

ProSchool also allows you to factor in discounts *regardless* of the tuition rate code used for each class (that is, whether or not the classes are "similar"). This is accomplished using the following options:

- The **Volume Discounts / Multi-Class Discounts** option configures tuition discounts for multiple classes of *any* type—"similar" or not—that have rates based on monthly, session or weekly tuitions (this discount option is most typically used for *non*-similar classes);
- The **Volume Discounts / Siblings** option configures tuition discounts for multiple Students enrolled by a single Family.

Note these two important distinctions about the **Volume Discounts** options:

1. Both enable you to configure discounts that are independent of, *and in addition to*, the discounts available using the above Monthly / Session / Weekly ("similar" class), Hourly or By Student tuition schemes.

2. Both apply discounts in a global fashion, *regardless* of the class type or class level.

Hint: If you find this range of tuition options overwhelming, remember: you can always start with a basic tuition scheme—even just one rate, if you wish—then modify it or add more tuition rate codes whenever you wish.

Getting to Know ProSchool Tuitions and Discounts

-continued-

Putting it All Together

Because of ProSchool's tremendous flexibility in establishing fee schedules, the tuition configuration process can be confusing if not approached in a logical manner.

It is assumed that before you approach this area of the Program's configuration, you have already planned out **how** you intend to bill your Families, we strongly suggest you put ProSchool aside and sketch out a basic tuition scheme for your school. The following questions are intended to assist you in that process:

- What do I like about my current tuition or rate scheme?
- What *don't* I like about it?
- Will Monthly, Session and / or Weekly tuitions work for my school?
- Do I want to offer "similar class" discounts?
- Do I want to implement Hourly or By Student tuitions?
- Do I want to offer discounts based on *class hours taken*?
- Do I want to offer discounts based on the *number of Students* enrolled by a single Family?
- Do I want to offer additional "global" discounts for *multiple classes taken*, regardless of class type or level?

After you have answered the above questions, you have a starting point for configuring your tuition codes. To keep things easy, we suggest the following approach:

1. If you are going to use monthly, session and / or weekly tuitions, start by configuring the **Tuition** codes that way—for monthly, session and weekly classes. This will give you a feel for how the **Tuition Setup** section works.

2. Next—*if* you are going to bill your Families on an hourly or by-Student basis—configure the **Hourly/By Student Rate** codes. (You must configure these codes before setting up the **Hourly** and **By-Student** tuition schedules.)

3. Finish configuring your **Hourly/By Student Rate** tuitions by returning to the Tuition section and setting up the Tuition fees for Hourly and By-Student categories.

4. If you want to offer additional "global" discounts, set them up under the **Volume Discounts** menu selection.

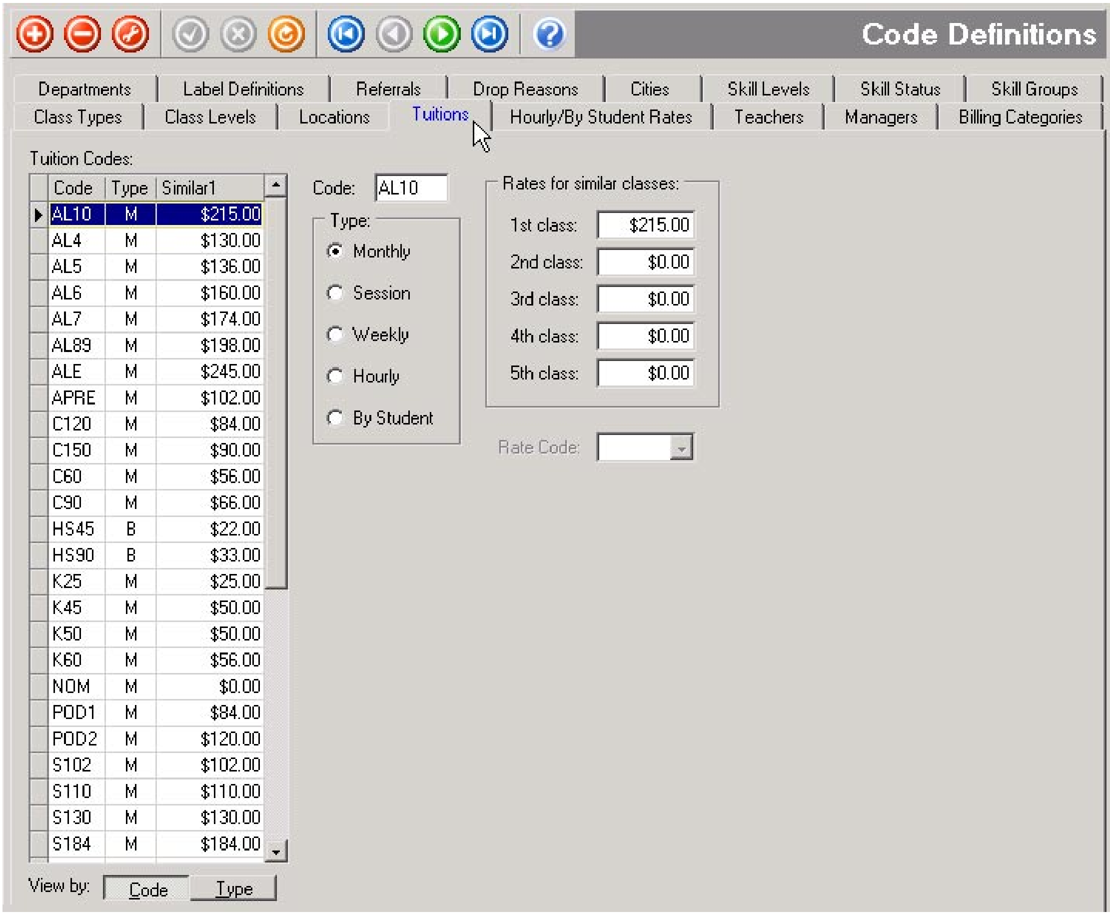
Note that the following section, "Setting up Tuition Codes for Your School", is arranged in the same order as points 1–4 above.

Configuring Tuition Codes and Discounts

Monthly, Weekly and Session Tuition Codes and Discounts

To create a Tuition code:

1. Click on the **Tuitions** tab to open the **Tuitions** panel:



2. Add, edit or delete Tuition codes by using the various icon buttons (as described in the previous subsection entitled “Class Type Codes”).

3. Enter a code up to four characters long in the **Code:** field.

4. Select **Monthly**, **Session** or **Weekly** tuition in the **Type:** box.

5. Enter the following values in the **Rates for similar classes:** section:

- **1st class:** [tuition amount for a single class]
- **2nd class:** [TOTAL of: tuitions of 1st class + 2nd (“similar”) class]
- **3rd class:** [TOTAL of: tuitions of 1st class + 2nd and 3rd (“similar”) classes]
- **4th class:** [TOTAL of: tuitions of 1st class + 2nd, 3rd and 4th (“similar”) classes]
- **5th class:** [TOTAL of: tuitions of 1st class + 2nd, 3rd, 4th and 5th (“similar”) classes]

Configuring Tuition Codes and Discounts

-continued-

For example, suppose you charge a $15 weekly tuition for a Monday tumbling class, and you have a Student that attends that class *and* a Wednesday dance class using the same tuition rate code—what ProSchool defines as a "similar" class. You have the option of:

- charging full tuition—$15 for each class for a total of $30, or;
- discounting the tuition of the "similar" class to a lesser amount of your choosing.

For example, you could set up your tuition so that the first tumbling class would be billed at the $15 tuition rate, and the second ("similar") tumbling class would be charged at a lesser $13 rate—a total tuition of $28. ProSchool allows you to configure this "similar class" discount for up to five different "similar" classes.

In the following example, we'll use the above "tumbling class @ $15 / week" tuition, and discount each additional "similar" class taken by $2:

- **1st class:** $15 (for a single class)
- **2nd class:** $28 ($15 + $13)
- **3rd class:** $39 ($15 + $13 + $11)
- **4th class:** $48 ($15 + $13 + $11 + $9)
- **5th class:** $55 ($15 + $13 + $11 + $9 + $7)

The **Rates for similar classes:** box would contain the above values as follows:

You can also discount additional "similar" classes then "level out" the tuition rate so additional classes are not discounted further. In the following example, we will use the above "tumbling class @ $15 / week" tuition, discount each additional "similar" class taken by $2, then *level out* the rate after three classes:

- **1st class:** $15
- **2nd class:** $28 ($15 + $13)
- **3rd class:** $39 ($15 + $13 + $11)
- **4th class:** $50 ($15 + $13 + $11 + $11)
- **5th class:** $61 ($15 + $13 + $11 + $11 + $11)

On the other hand, you may wish to charge a "level" rate for all classes without any discount offered for "similar" classes:

- **1st class:** $15
- **2nd class:** $30 ($15 + $15)
- **3rd class:** $45 ($15 + $15 + $15)
- **4th class**: $60 ($15 + $15 + $15 + $15)
- **5th class:** $75 ($15 + $15 + $15 + $15 + $15)

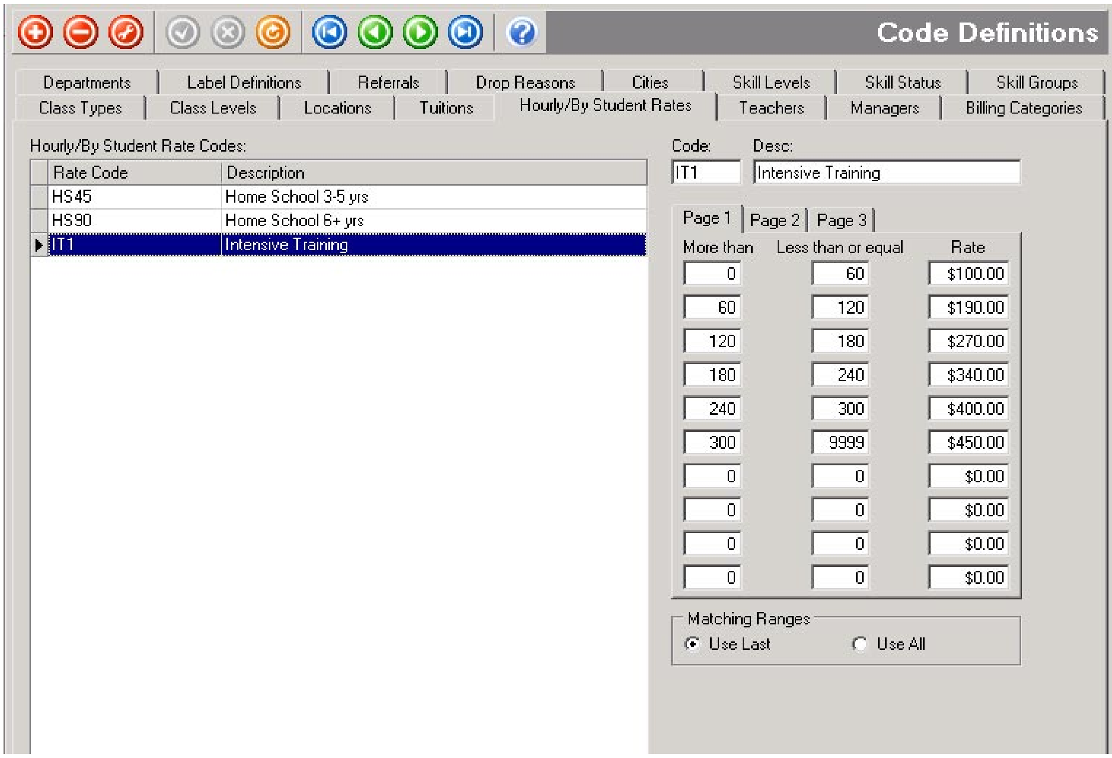
Regardless of the number of classes taken—"similar" or otherwise—the above rate schedule would charge the same tuition for all classes taken.

Configuring Tuition Codes and Discounts

-continued-

Hourly Rate Codes and Discounts

As discussed above, Hourly codes allow you to configure discounts into your tuition schedule based on the number of *class hours* a Student is enrolled (which is expressed in minutes, as you will notice in the screen shot below). However, before you can configure tuition *codes* based on these rates, you must first establish the *rates* in the **Hourly/By Student Rate Code Setup** window:



In this scenario (illustrated above), the tuition rate is set up on an hourly basis at $100 per hour. It is configured to discount the hourly fee by $5 for every additional hour of instruction, then levels off (no additional discount) after 5 hours of instruction. Note that in this example, we have applied this discount *inclusively*, by selecting **Use Last** in the **Matching Ranges** section (immediately below the table) so that the discount applies to *all* hours of instruction. In other words, this discount is *not* progressively applied (full charge for the first hour, $95 for the second hour, $90 for the third hour, etc.). This rate schedule would break down as follows:

- the first hour (up to 60 minutes of instruction) would be billed at $100 / hour (first rate tier), resulting in a total charge of $100 (no discount has been applied);
- 1+ to 2 hours (61 to 120 minutes) of instruction would be billed at $95 / hour (second rate tier), resulting in a total charge of $190;
- 2+ to 3 hours (121 to 180 minutes) of instruction would be billed at $90 / hour (third rate tier), resulting in a total charge of $270;
- 3+ to 4 hours (181 to 240 minutes) of instruction would be billed at $85 / hour (fourth rate tier), resulting in a total charge of $340;
- 4+ to 5 hours (241 to 300 minutes) of instruction would cost $80 / hour (fifth rate tier), resulting in a total charge of $400;
- 5+ hours (301 to 9,999 minutes) of instruction would be billed at $75 / hour (sixth rate tier), resulting in a total charge of $450.

Configuring Tuition Codes and Discounts

-continued-

Note that the last (sixth) rate tier displays an artificially high value of 9,999 in the **Less than or equal** field. This value is intentionally well in excess of the number of class hours a Student would realistically take, for this reason: it allows ProSchool to “capture” any Students taking more than 5 class hours because, in the above example, we don’t wish to discount our rates any further. In reality, there will be many situations when you may utilize far fewer rate tiers—such as only two or three.

On the other hand, while our example uses only six rate tiers, you can configure a rate code with up to 30 tiers—the first through 10th in the **Page 1** tab section, the 11th through 20th in the **Page 2** tab section and the 21st through 30th in the **Page 3** section. This can be useful, for example, if you want a sliding tuition schedule across a large class population. As with other aspects of ProSchool, there is plenty of flexibility to accommodate any rate schedule you wish to implement.

To create Hourly rate codes:

1. Click on the **Hourly/By Student Rates** tab to open the **Hourly/By Student Rates** panel (shown on the previous page).

2. Add, edit or delete Hourly Rate codes by using the various icon buttons (as described in the previous subsection entitled “Class Type Codes”).

3. Enter a code up to four characters long in the **Code:** field.

4. Enter a description of the code up to 30 characters long in the **Desc:** field.

5. Enter the appropriate values in the **More than**, **Less than or equal** and **Rate** fields. For the rate scheme described on the previous page, the values would be as follows:

0	60	100.00
60	120	190.00
120	180	270.00
180	240	340.00
240	300	400.00
300	9999	450.00

...and so on, up to a maximum of 30 rate levels.

When building a rate structure as such as this, be sure you configure it *beyond* the maximum possible number of hours any Student could take. This prevents a situation in which “excess” hours are not billed to the Client. In the example shown above, we leveled out the rate structure *after* six hours of instruction. This assumes that no Student would take more than six hours of instruction; if they do, they will still be billed at that tier’s rate of $450, *regardless of how many more hours of instruction they receive* (“more than 300 minutes, **less than or equal to 9,999** minutes”). In essence, any Student who is billed according to the above rate structure, and takes more than six hours of instruction, is getting that “excess” instruction (anything beyond 6 hours) free of charge.

Configuring Tuition Codes and Discounts

-continued-

If we continue this example, the rate structure would appear as follows (new rate tiers are shown in bold):

0	60	100.00 (1 x $100/hr)
60	120	190.00 (2 x $95/hr)
120	180	270.00 (3 x $90/hr)
180	240	340.00 (4 x $85/hr)
240	300	400.00 (5 x $80/hr)
300	**360**	**450.00** (6 x $75/hr)
360	**420**	**525.00** (7 x $75/hr)
420	**9999**	**600.00** (8 x $75/hr)

As mentioned earlier, the above example is *inclusive* because it applies the discounted hourly rate to *all* billed hours of instruction, first through last. If you wanted this rate structure to be progressive, in which each additional hour receives a progressively greater discount, you would select **Use All** in the **Matching Ranges** section (immediately below the table).

The rate tier needs to be modified as follows:

0	60	100.00
60	120	95.00
120	180	90.00
180	240	85.00
240	300	80.00
300	360	75.00
360	420	75.00
420	9999	75.00

This will change the way ProSchool applies discounts to successive hourly rates, and will compute charges as follows:

- the first hour (up to 60 minutes of instruction) would be billed at $100 / hour (first rate tier), resulting in a total charge of $100 (no discount has been applied);
- 1+ to 2 hours (61 to 120 minutes) of instruction would be billed at $100 for the first hour, and $95 for the second hour, resulting in total charge of $195;
- 2+ to 3 hours (121 to 180 minutes) of instruction would be billed at $100 for the first hour, $95 for the second hour and $90 for the third hour, resulting in total charge of $285;
- 3+ to 4 hours (181 to 240 minutes) of instruction would be billed at $100 for the first hour, $95 for the second hour, $90 for the third hour and $85 for the fourth hour, resulting in total charge of $370;
- 4+ to 5 hours (241 to 300 minutes) of instruction would be billed at $100 for the first hour, $95 for the second hour, $90 for the third hour, $85 for the fourth hour and $80 for the fifth hour, resulting in total charges of $450;
- 5+ to 6 hours (301 to 360 minutes) of instruction would be billed at $100 for the first hour, $95 for the second hour, $90 for the third hour, $85 for the fourth hour, $80 for the fifth hour and $75 for the sixth hour, resulting in total charges of $525;
- 6+ to 7 hours (361 to 420 minutes) of instruction would be billed at $100 for the first hour, $95 for the second hour, $90 for the third hour, $85 for the fourth hour, $80 for the fifth hour, $75 for the sixth hour *and $75 per hour for all hours in excess of 6 hours*, resulting in total charges of $525 plus $75 for each additional hour.

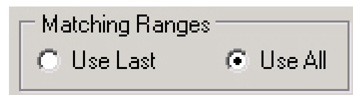
Configuring Tuition Codes and Discounts

-continued-

Your choice (“Use Last” vs. “Use All” in the **Matching Ranges** section) have a direct bearing on the billable amounts:

RATE TIER

0	60	100.00	1 x $100/hr = **$100**
60	120	190.00	2 x $95/hr = **$190**
120	180	270.00	3 x $90/hr = **$270**
180	240	340.00	4 x $85/hr = **$340**
240	300	400.00	5 x $80/hr = **$400**
300	360	450.00	6 x $75/hr = **$450**
360	420	525.00	7 x $75/hr = **$525**



RATE TIER

0	60	100.00	1 x $100/hr = **$100**
60	120	95.00	$100+$95=**$195**
120	180	90.00	$100+$95+$90=**$285**
180	240	85.00	$100+$95+$90+$85=**$370**
240	300	80.00	$100+$95+$90+$85+$80=**$450**
300	360	75.00	$100+$95+$90+$85+$80+$75=**$525**
360	420	75.00	$100+$95+$90+$85+$80+$75+$75=**$600**

As you can see, the “Use All” option lessens the computed discount amount, while the “Use Last” method applies the discount more liberally to the charges, thus giving your Clients a greater price break (all other things being equal). Which method you use is largely a matter of personal preference.

7. Remember to click  to save your code when you are done.

By Student Rate Codes and Discounts

As discussed above, “By Student” rate codes allow you to configure discounts into your tuition schedule based on the *number* of Students enrolled by a given Family. Note this is essentially a “flat rate” tuition scheme based only on the number of Students, *regardless* of the number and type of classes the Students are enrolled in.

As with the hourly rates, you must first establish the “By Student” *rates* themselves before you can configure the “By Student” tuition *codes*.

For example, suppose you have a Family who is enrolling three Students, and whose tuition rate is set up at $40 per Student. You arrange with the Family to charge a rate schedule that discounts the hourly fee by $2 for every additional Student enrolled.

If you select “Use Last” in the **Matching Ranges** section, this rate schedule would compute charges as follows:

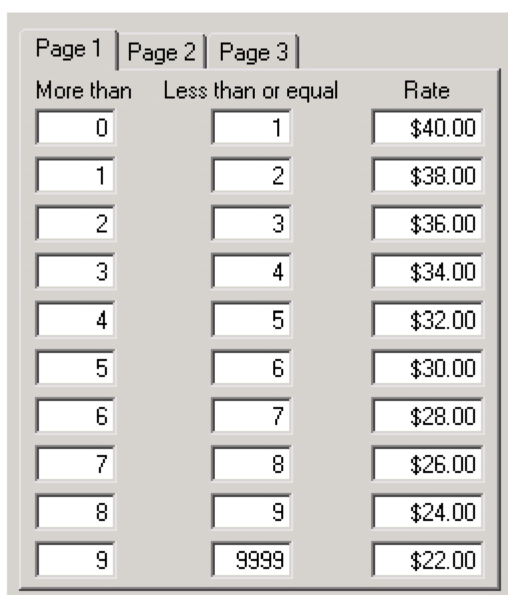
- 1st Student enrolled would be charged at the $36 / hr rate (total = $36);
- 2nd Student enrolled would be charged at the $36 / hr rate (total = $72);
- 3rd Student enrolled would be charged at the $36 / hr rate (total = $108);

If you select “Use All” in the **Matching Ranges** section, this rate schedule would compute charges as follows:

- 1st Student enrolled would be charged at the $40 / hr rate (total = $40);
- 2nd Student enrolled would be charged at the $38 / hr rate (total = $78);
- 3rd Student enrolled would be charged at the $36 / hr rate (total = $114);

If the scheme sounds familiar to the “Hourly” rate code scheme discussed in the previous section, it should: whether hours or students, the quantities and rates are input in the very same window, and the concept is essentially the same.

Here’s a second example. Let’s say you want to use a “Use All” tuition rate scheme in which the “By Student” hourly rate levels out at $22.00 (i.e, the By Student fee would never drop below $22.00 even if more than nine students were enrolled). The input data would look like this:



More than	Less than or equal	Rate
0	1	$40.00
1	2	$38.00
2	3	$36.00
3	4	$34.00
4	5	$32.00
5	6	$30.00
6	7	$28.00
7	8	$26.00
8	9	$24.00
9	9999	$22.00

Configuring Tuition Codes and Discounts

-continued-

 **To create By Student rate codes:**

1. Click on the **Hourly/By Student Rates** tab to open the **Hourly/By Student Rates** panel (shown on the previous page).

2. Add, edit or delete By Student codes by using the various icon buttons (as described in the previous subsection entitled “Class Type Codes”).

3. Enter a code up to four characters long in the **Code:** field.

4. Enter a description of the code up to 30 characters long in the **Desc:** field.

5. Select **Use Last** or **Use All** in the **Matching Ranges** section (per the above guidelines).

6. Enter the appropriate Student values in the **More than** and **Less than or equal** fields, and the appropriate “By Student” rates in the **Rate** fields. If you use up all the tiers on the first page, remember—you can keep going with this tiered rate scheme (up to a maximum of 30 rate levels) by continuing to the tabbed **Page 1**, **Page 2** and **Page 3** sections. Just remember to enter an exceedingly high “end” value for quantity of Students (such as “9,999”, above) in your final rate tier.

7. Remember to click  to save your new code when you are done.

Multiple “Hourly” and “By Student” rates can easily be accommodated. For example, if you want to create additional rates using the same “hours” or “# of Students enrolled” stats (“More than”, “Less than or equal”), but want to change the hourly rate, that can easily be done. Just repeat the above instructions, as appropriate, until you have all the “Hourly” and “By Student” rates you need.

*Hint: Give careful consideration to the codes you assign so they can be easily identified at a glance. For example, for an Hourly rate of $40 that breaks at every five additional hours of class time, you might use a code such as “*H405*”. Or, for a By Student rate of $40 that breaks at every additional Student enrolled as in the other scenario above, you might use a code such as “*S401*”.*

Configuring Tuition Codes and Discounts

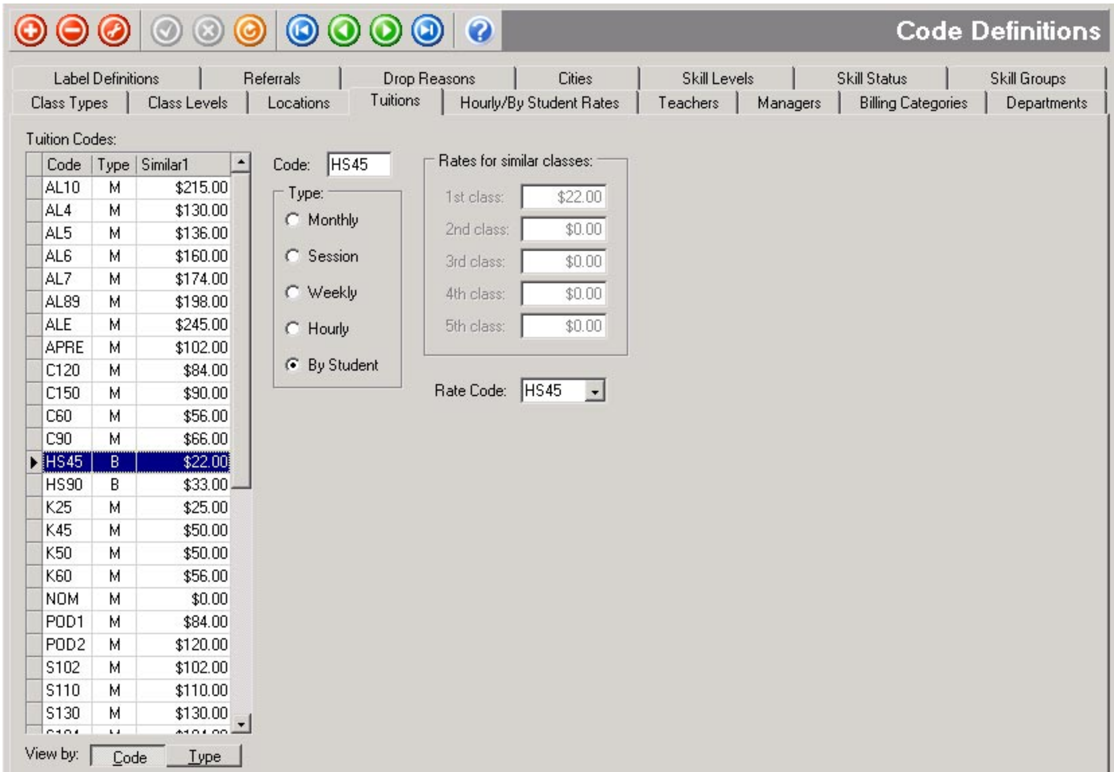
-continued-

■ CONFIGURING TUITION CODES FOR HOURLY AND BY STUDENT RATES

Now that you have established the “Hourly” and “By Student” rate schedules, you can add Tuition codes that use these rates.

To configure Hourly and By Student rate tuition codes:

1. Click on the **Tuitions** tab to open the **Tuitions** panel:



2. Add, edit or delete Tuition codes by using the various icon buttons (as described in the previous subsection entitled “Class Type Codes”).

3. Enter a code up to four characters long in the **Code:** field.

4. Select **Hourly** or **By Student** in the **Type:** field, as appropriate. Note that either choice grays out the subtitles and field values in the **Rates for similar classes** section, thus preventing entry (with either of these tuition **Type:** selections, a Rate Code must be used.)

5. Select a Rate Code from the **Tuition Codes:** menu.

6. Remember to click to save your code when you are done.

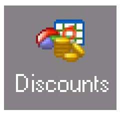
Volume Discounts

The Volume Discounts option allows you to configure “global” tuition discounts using four different criteria:

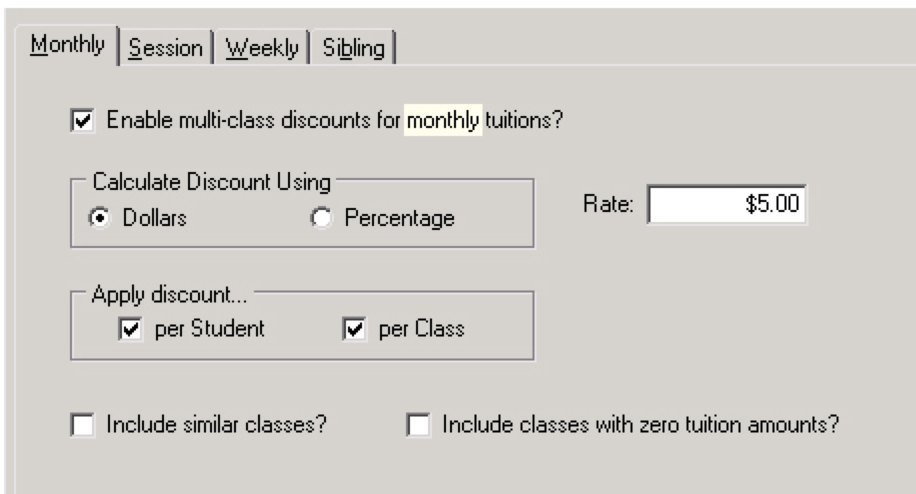
- The **Multi-Class** option configures tuition discounts for multiple *classes* of any type, “similar” or not, based on monthly, session or weekly tuitions;
- The **Siblings** option configures tuition discounts for multiple *Students* enrolled by a single Client regardless of the classes in which they are enrolled.

 **To configure Volume Discounts using “Monthly”, “Weekly” or “Session” options:**

1. Click **Setup** (located in the top of the vertical menu button bar on the left of the screen).

2. Click 

(the **Discounts** menu button) to open the **Volume Discounts** panel (The panel will always default to the **Monthly** option when it is opened):



Note the four tabs. The first three (**Monthly**, **Session** and **Weekly**) are the Multi-class options described above. The **Siblings** option is the fourth Volume Discounts option and works slightly differently than the first three (which we’ll explain further below).

Note that the panels, and the procedures for configuring the “Multi-Class” options (“Monthly”, “Session” and “Weekly”) are almost identical. In fact, if you compare the appearance of the three (above and below) you will find they vary only in the legend next to the **Enable...** check box:

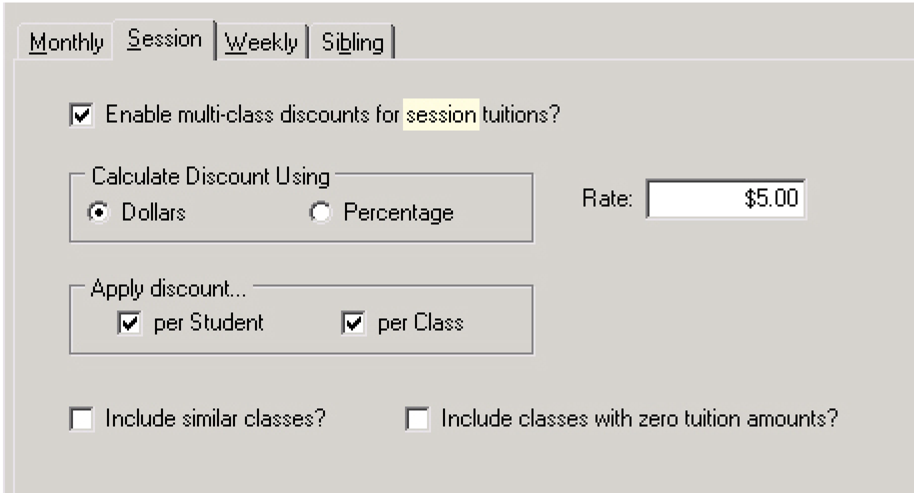
Enable multi-class discounts for monthly/session/weekly tuitions?

(This is highlighted in the illustrations above and below, on the following page.)

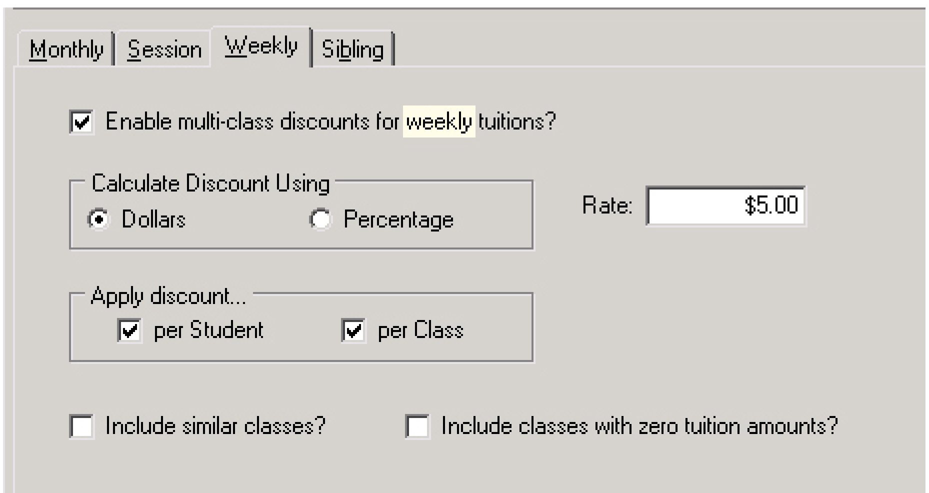
Configuring Tuition Codes and Discounts

-continued-

The **Session** panel looks like this:



The **Weekly** panel looks like this:



3. Select the **Monthly**, **Session** and **Weekly** tab depending on how you want to configure the Multi-Class discount.

4. Check the **Enable...** check box.

5. Indicate how you want ProSchool to calculate the discount by selecting either **Dollars** or **Percentage** in the **Calculate Discount Using** section.

6. Indicate how you want ProSchool to count classes for the purpose of determining if a multi-class situation exists:

- if you want the class count to be based on how many classes each *indivudual* Student is taking, select the **per Student** check box (this will result in a lower class count, which means the discounts will “kick in” later, and utlimately amount to less);
- if you want the class count to be based on the *total* number of classes *all* Students from a given family are taking collectively, *do not* select the **per Student** check box (this will result in a higher total class count, which means the discounts will “kick in” sooner and therefore total a higher dollar amount).

Configuring Tuition Codes and Discounts

-continued-

For example, let's say you have a family with two Students, each enrolled in a single class. If the **per Student** option is selected, NO "multi-class" situation would exist because each Student is only enrolled in one class each (i.e., the class count = 1). Conversely, if the **per Student** option is **not** selected, a "multi-class" situation *would* exist because each Student's class is included in the total class count (i.e., the class count = 2, therefore a multi-class condition exists, and the discount applies).

If you check the **Per Class** checkbox, discounts are applied to *each class*, skipping the highest price class. If the **Per Class** checkbox is *not* checked, discounts are applied to the **total** of all classes."

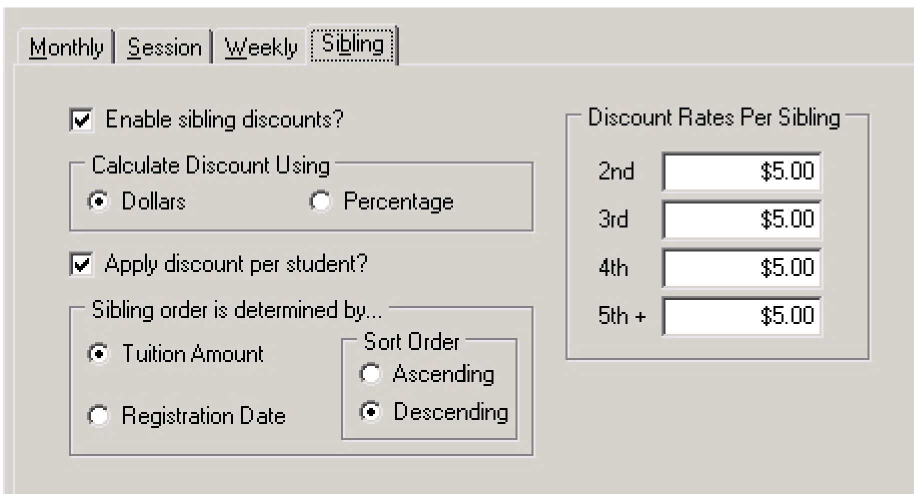
7. If you want to include in the class count any "similar" classes (those using the same tuition rate code), select **Include similar classes?**.

8. If you want to include in the class count any zero-tuition classes taken by this Client's Students, select **Include classes with zero tuition amounts?**.

9. You can disable this discount, while keeping the settings you've configured, by simply deselecting the **Enable multi-class discounts for** [**monthly/session/weekly**] **tuitions?**.

To configure Volume Discounts using the "Sibling" option:

1. Select the **Sibling** tab to open the **Sibling** panel:



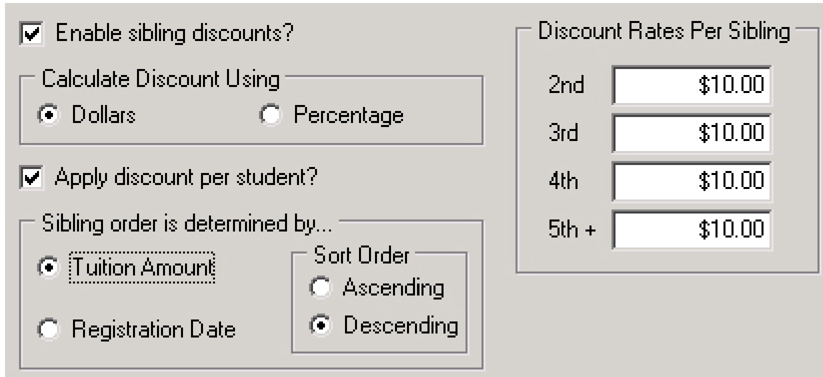
2. Check the **Enable sibling discounts?** check box.

3. Indicate how you want ProSchool to calculate the discount by selecting either **Dollars** or **Percentage** in the **Calculate Discount Using** section.

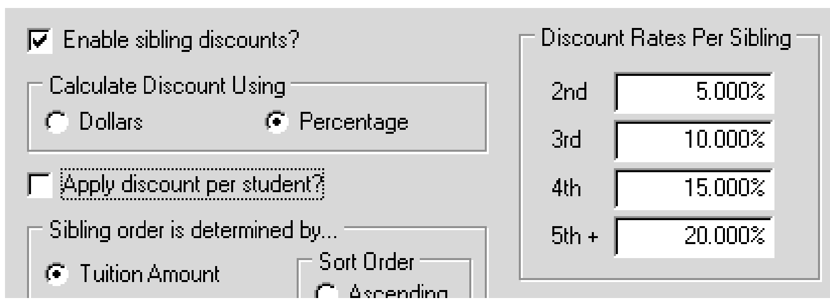
Configuring Tuition Codes and Discounts

-continued-

4. In the **Discount Rates per Sibling** section, enter the discount amount or percentage you want ProSchool to apply to each respective sibling (**2nd**, **3rd**, **4th** and **5th+** fields). For example, if you wanted to offer a discount of $10 off the tuition of each additional sibling that enrolled, the **Discount Rates per Sibling** section (**2nd**, **3rd**, **4th** and **5th+** fields), would look like this:



Or, if you wanted to offer a percentage-off discount of an additional *cumulative* five percent for each additional sibling, the **Discount Rates per Sibling** section (**2nd**, **3rd**, **4th** and **5th+** fields), would display the following values:



! If the **Apply discount per student?** check box is <u>un</u>selected as in the above illustration, ProSchool *will not* apply cumulative discounts on a tiered basis (five percent, 10 percent, 15 percent and so on). Instead, ProSchool will compute the multiple-sibling discounts by using the total number of siblings and applying the *same* corresponding discount to the total family tuition charge (regardless of each individual Students's tuition total).

For example, if there are three siblings in a family, ProSchool will apply the corresponding 10 percent discount to the total tuition charge; if there are five siblings in a family, ProSchool will apply the 20 percent discount to the total tuition charge (based on the discount percentages shown in the above illustration).

This is the configuration you would use, for example, if you want discounts to be based solely on the number of siblings enrolled in classes but want the tuition discount applied to the tuition total as a lump sum.

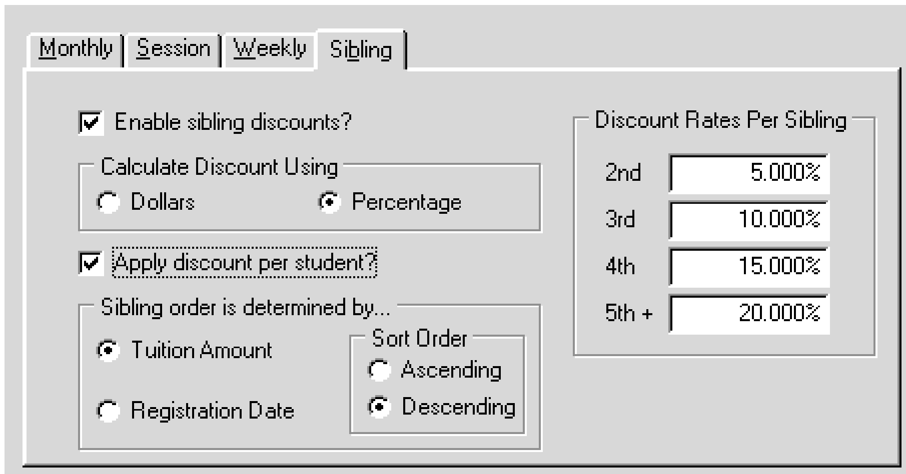
Configuring Tuition Codes and Discounts

-continued-

5. To apply this discount to each sibling, select the **Apply discount per student?** option. When you do, the **Sibling order is determined by...** section will become active (ungrayed). Here's how it works:

To apply discounts on a per-sibling basis, ProSchool needs to know what order to put multiple siblings in so it can apply the appropriate discounts to each sibling. If you offer "percentage-off" discounts, for example, you may wish to order the siblings so that the Student being charged the highest tuition amount is first in order, the sibling charged the least is last and so on. This way, the lesser discounts would be applied to those siblings at the top of the list (2nd on down) so they would receive a *smaller* monetary discount (a smaller percentage of a larger tuition amount equals a smaller monetary discount).

This discount would be configured as follows:



Note that the **Tuition Amount** option is selected in the **Sibling order is determined by...** section, and the **Descending** option is selected in the **Sort Order** section. As shown in the window above, this criteria results in discounts being applied in this order:

- the sibling with the highest tuition charge is first (no discount);
- the sibling with the next highest tuition charge is second (5 percent discount);
- the sibling with the third highest tuition charge is third (10 percent discount);
- the sibling with the fourth highest tuition charge is fourth (15 percent discount);
- the sibling with the lowest tuition charge, *and* any additional Students whose tuition is equal to or lesser than this sibling's tuition, are fifth (20 percent discount).

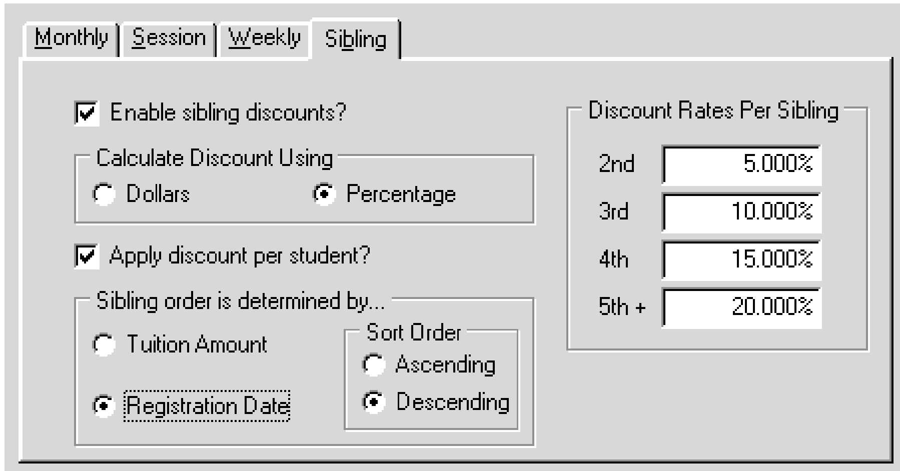
If you wanted ProSchool to organize the siblings so that the one with the *lowest* tuition charge was first (received no discount), and the sibling with the highest tuition charge was last (20 percent discount), you would select the **Ascending** option in the **Sort Order** section to achieve the following results:

- the sibling with the lowest tuition charge is first (no discount);
- the sibling with the next lowest tuition charge is second (5 percent discount);
- the sibling with the third lowest tuition charge is third (10 percent discount);
- the sibling with the fourth lowest tuition charge is fourth (15 percent discount);
- the sibling with the highest tuition charge, *and* any additional Students whose tuition is equal to or greater than this sibling's tuition, are fifth (20 percent discount).

Configuring Tuition Codes and Discounts

-continued-

As an alternative, you may wish to configure your sibling tuition discounts based on the length of time a Student has been active in your school, as determined by the registration date. If so, the settings would be as follows (assuming that the Students who have been with your school the longest receive the greatest discount):



Remember, ProSchool sees dates as numerical values. Therefore, by selecting the **Descending** sort order, ProSchool looks first at Students with the most recent registration date (highest numerical value) and *descends* in value to the Students with the oldest registration date (lowest numerical value).

The values in the **Discount Rates Per Sibling** section are entirely up to you. The examples above use a tiered discount schedule whereby each additional sibling would receive a greater discount. You may choose to offer the *same* discount for each sibling, or level out the discount after the second or third sibling. Alternately, you could use dollar discounts instead of percentage discounts. Simply select **Dollars** in the **Calculate Discount Using** section. The other options and procedures would apply just as they would for a percentage-off discount.

Setting Up ProSchool Departments and Billing Categories

Understanding ProSchool Departments and Billing Categories

ProSchool allows a great deal of flexibility in how charges are generated, and how payments are reconciled to the charges. Billing and receivables are handled logically, making it easy to track how charges originate, and how payments for those charges are reconciled when monies are received.

Let's explore this further: When a charge is created, it originates via a billing category—tuition, team uniforms, association fees, memberships, etc. In ProSchool, you'll always know exactly where a charge originates because *you* set up the billing categories and configure them in a way that best suits your school's needs (and you can always add new billing categories as needed, on the fly).

• Key point #1: To **generate** charges, ProSchool uses **billing categories**.

How about when you *receive payments* for those charges?

When payments are received, the monies are broken down *by department* so that specific charges are reconciled with a specific payment for that charge (even if it's a partial payment, the reconciliation keeps your books on track).

For example, most charges typically include some sort of tuition. When payment for a tuition charge is received, it is credited to a specific "department". In a gymnastics setting, such departments could be "acrobatic team", "girls team", "boys team", "kindergym", etc. By the same token, a charge for use of your facility could be credited to a department named "facility rental", and payment for sales of leotards could be credited to "boutique" or "store" (whatever you want to call the department—it's up to you).

The greater point is this: monies received aren't just "thrown into the big pot", so to speak—they are reconciled to a specific department.

• Key point #2: **Incoming payments** (receivables) are applied to **departments**.

Why is this important?

1. You can track exactly which departments are running at a profit or loss, allowing you to monitor your "profit centers". At the end of the month, for example, you can gage the performance of a given department to see exactly what the income is, and how that compares to your operating expenses for that department. You can also compare one month to the next, or get quarterly or year-end totals.

2. It's a useful way to spot trends. For example, you might determine that at certain times of the year, attendance falls off, so spotting and anticipating such a trend helps you to be proactive in planning additional programs, such as summer camps, that can offset the loss of revenue your school would otherwise experience.

Setting Up ProSchool Departments and Billing Categories

Following is a list of billing categories you might use for the tuitions and fees charged at your school. The category descriptives follow in all caps, abbreviated where necessary to fit the field length:

- monthly tuition – JAN TUITION, FEB TUITION, MAR TUITION, etc.;
- assessments (team assessment fees) – ASSESSMENT;
- association fees (USAG, etc.) – ASSOC FEES, USAG FEES, etc.;
- birthday parties (for parties held in your facility) – BIRTHDAY PARTIES;
- credit – CREDIT:
- cheer clinic – CHEER CLINIC;

-continued-

- field trips – FIELD TRIPS;
- gift certificates – GIFT CERTIFICATE;
- membership (annual membership dues) – MEMBERSHIP;
- late fee (overdue receivables from previous billing periods) – LATE FEE;
- pro shop (purchases from the school's pro shop) – PRO SHOP;
- rent (fees received for facility rental) – FACILITY RENTAL;
- returned checks – RETURNED CHECK;
- special events – SPECIAL EVENT;
- summer camp – SUMMER CAMP;
- team functions – TEAM FUNCTIONS;
- uniforms – UNIFORMS;

There may be other categories you can think of adding in addition to—or instead of—the above suggestions. Remember: you can add new billing categories "on the fly", as needed (and as your facility with ProSchool increases).

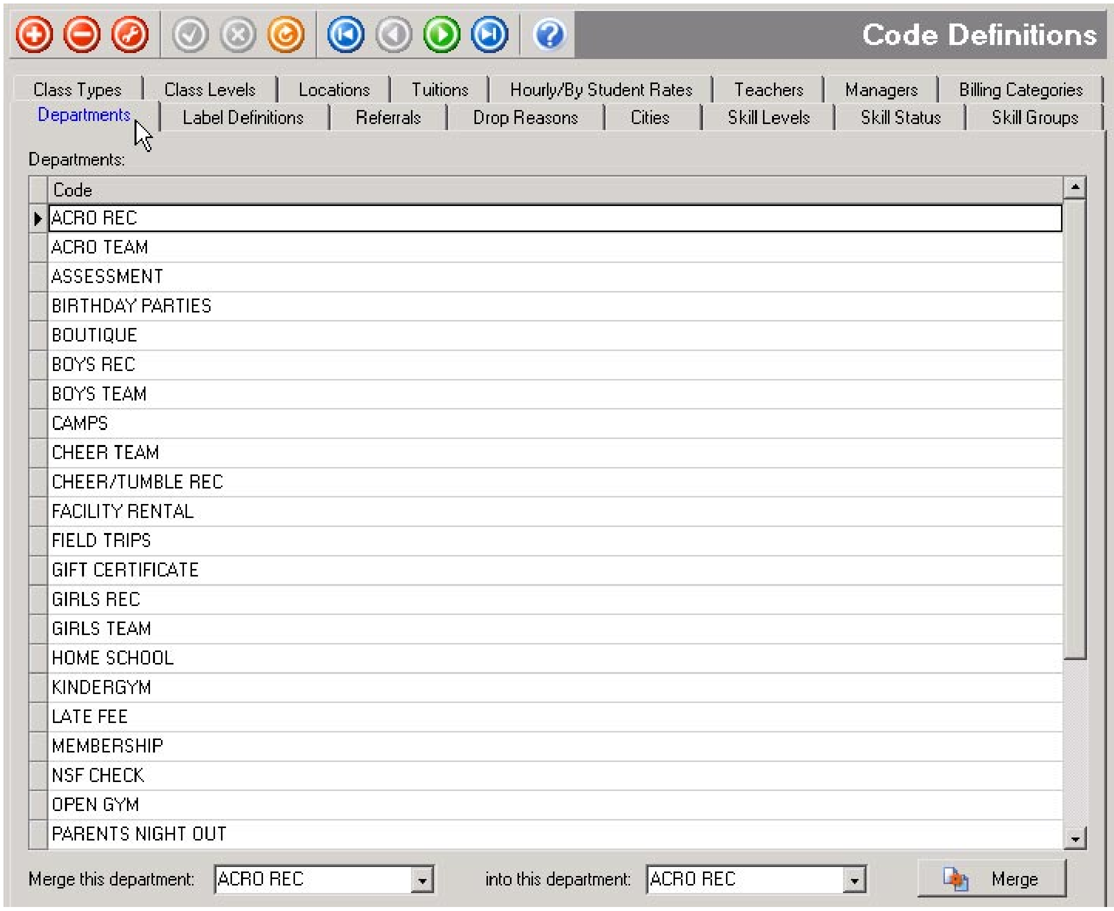
Setting Up ProSchool Departments and Billing Categories

-continued-

Creating Department Codes

To create ProSchool Department codes:

1. Click on the **Departments** tab to open the **Departments** panel:



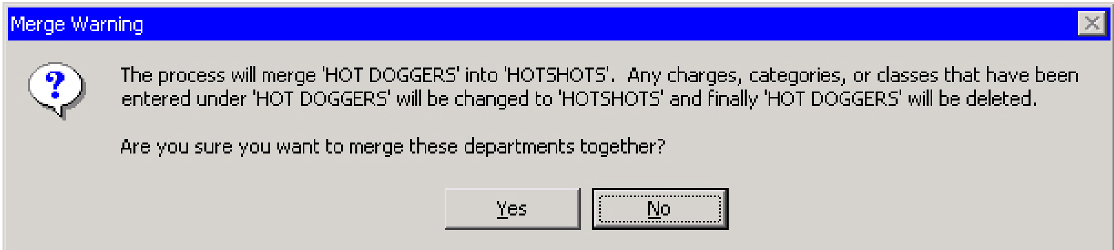
2. Add, edit or delete Departments by using the various icon buttons (as described in the previous subsection entitled “Class Type Codes”).

Note that the **Code** field accepts codes of up to 20 characters long.

3. Remember to click  to save your entry when you are done.

Setting Up ProSchool Departments and Billing Categories

4. If you find that you wish to combine the codes from two departments you have previously defined (due to similarity or other reason), select the two departments you wish to merge using the **Merge this department:** and **into this department:** pull-down fields at the bottom of the panel, then click  to initiate the merge process. This confirmation message will appear, specifying exactly what you are about to merge:



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Consider your answer carefully—you cannot undo this action!

Click **Yes** to complete the merge process, or **No** to abort the merge process. If you click **Yes**, the merge will be completed.

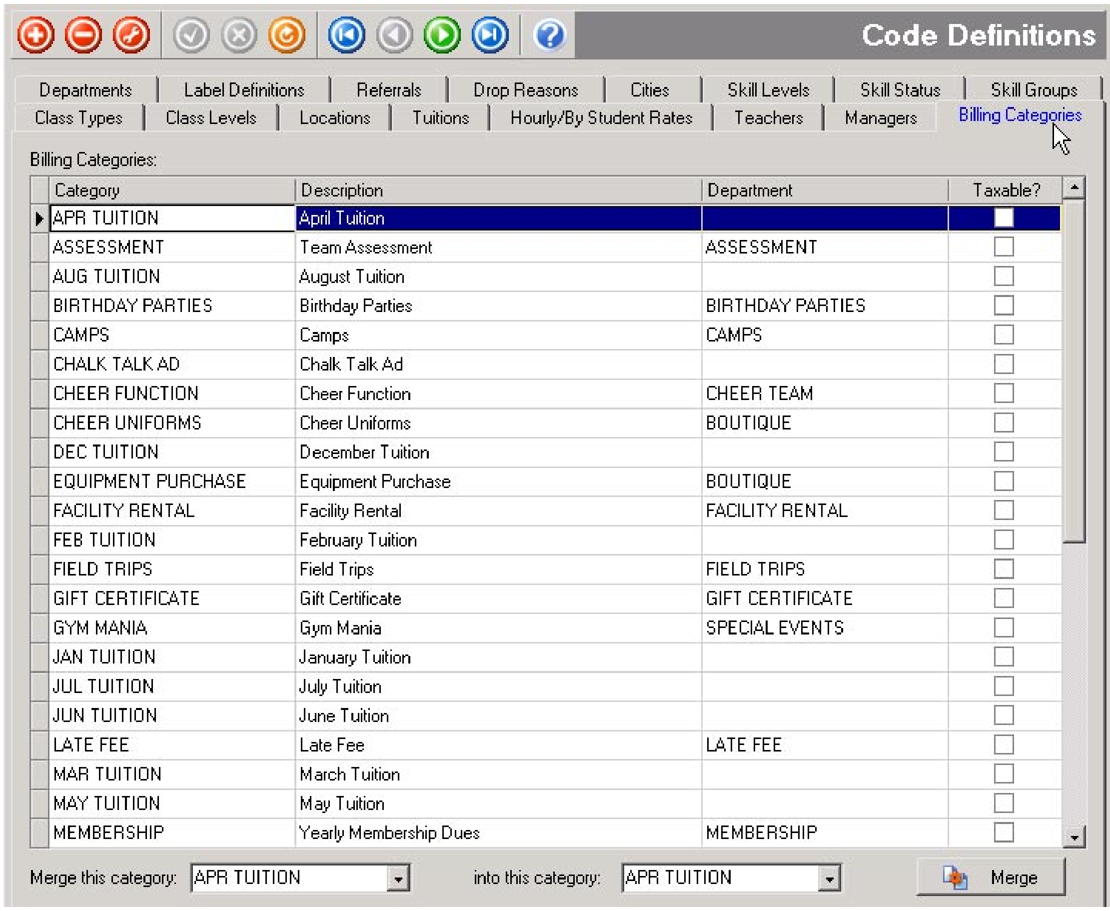
Setting Up ProSchool Departments and Billing Categories

-continued-

CREATING BILLING CATEGORIES

To create ProSchool billing categories:

1. From within the **Code Definitions** section, click on the **Billing Categories** tab to open the **Billing Categories** panel:



Category	Description	Department	Taxable?
APR TUITION	April Tuition		☐
ASSESSMENT	Team Assessment	ASSESSMENT	☐
AUG TUITION	August Tuition		☐
BIRTHDAY PARTIES	Birthday Parties	BIRTHDAY PARTIES	☐
CAMPS	Camps	CAMPS	☐
CHALK TALK AD	Chalk Talk Ad		☐
CHEER FUNCTION	Cheer Function	CHEER TEAM	☐
CHEER UNIFORMS	Cheer Uniforms	BOUTIQUE	☐
DEC TUITION	December Tuition		☐
EQUIPMENT PURCHASE	Equipment Purchase	BOUTIQUE	☐
FACILITY RENTAL	Facility Rental	FACILITY RENTAL	☐
FEB TUITION	February Tuition		☐
FIELD TRIPS	Field Trips	FIELD TRIPS	☐
GIFT CERTIFICATE	Gift Certificate	GIFT CERTIFICATE	☐
GYM MANIA	Gym Mania	SPECIAL EVENTS	☐
JAN TUITION	January Tuition		☐
JUL TUITION	July Tuition		☐
JUN TUITION	June Tuition		☐
LATE FEE	Late Fee	LATE FEE	☐
MAR TUITION	March Tuition		☐
MAY TUITION	May Tuition		☐
MEMBERSHIP	Yearly Membership Dues	MEMBERSHIP	☐

2. Add, edit or delete Billing Categories by using the various icon buttons (as described in the previous subsection entitled "Class Type Codes").

Note that the **Category** field accepts codes of up to 20 characters in length, and the **Description** field accepts descriptions of up to 40 characters long.

3. Use the pull-down menu in the **Department** field to make the appropriate choice (these are the departments codes you defined in a previous section).

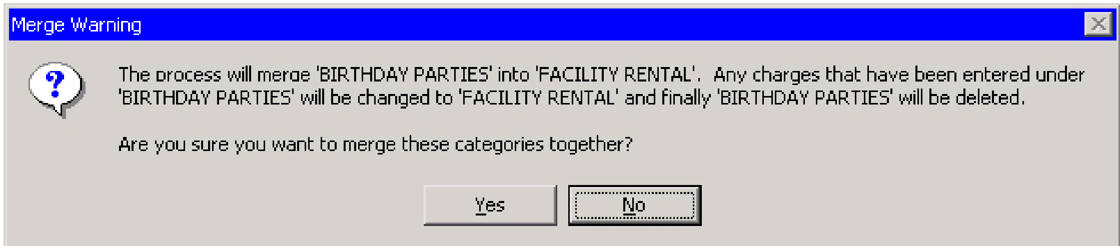
4. Click **Taxable** if that applies to this particular category in the jurisdiction in which you are doing business.

5. Remember to click to save your entry when you are done.

Setting Up ProSchool Departments and Billing Categories

6. If you find that you wish to combine the codes from two billing categories you have previously defined (due to similarity or other reason), select the two billing categories you wish to merge using the **Merge this category:** and **into this category:** pull-down fields at the bottom of the panel, then click 

to initiate the merge process. This confirmation message will appear, specifying exactly what you are about to merge:



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Consider your answer carefully—you cannot undo this action!

Click **Yes** to complete the merge process, or **No** to abort the merge process. If you click **Yes**, the merge will be completed.

At this point, your departments and billing categories should be complete.

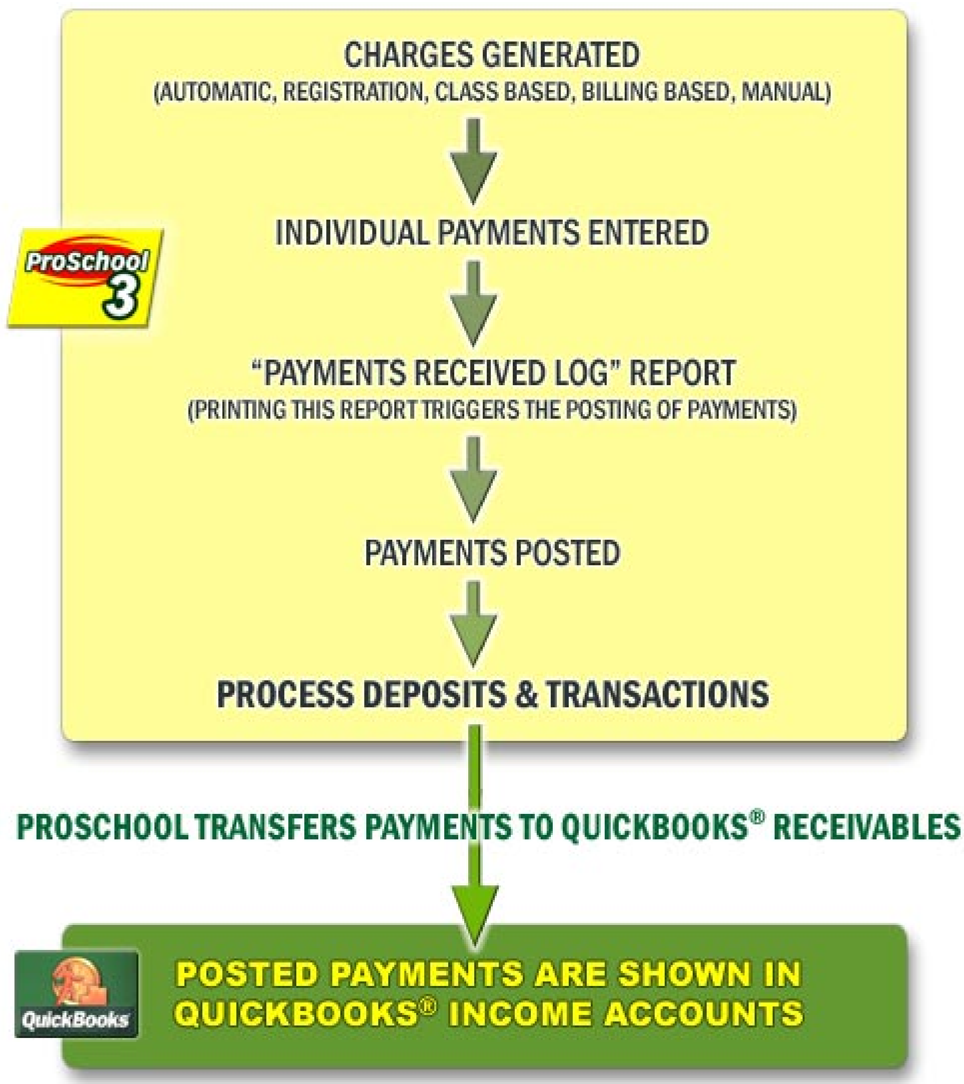
Configuring QuickBooks® and ProSchool for Seamless Integration

Understanding How QuickBooks® Interfaces With ProSchool

ProSchool interfaces seamlessly with QuickBooks® to make your bookkeeping tasks easy and efficient. This saves a significant amount of time compared to doing your accounting any other way.

If you currently do your school's accounting tasks using another means (whether manual or computerized), we strongly recommend you purchase QuickBooks® and invest the time in learning and implementing this program to handle your school's bookkeeping tasks. You will find that the investment in the software and training pays off handsomely in the time you will ultimately save.

ProSchool is designed to handle the **income** side of your business; that is, your *receivables*. Though ProSchool has many features that give it tremendous capability in the area of your schools' bookkeeping tasks, the greater point is that ProSchool is not itself an accounting program—which is why it is designed to integrate with QuickBooks®. ProSchool manages income, then transfers the income figures to the receivables side of QuickBooks®:



Configuring QuickBooks® and ProSchool for Seamless Integration

CONFIGURING PROSCHOOL TO INTEGRATE WITH QUICKBOOKS®

ProSchool is designed to "hook up" with QuickBooks® right out of the box. All you have to do is set a few parameters, explained in the steps below, then associate your ProSchool departments with corresponding QuickBooks income accounts. First, we'll focus on setting the parameters.

Please note that **the QuickBooks® guidelines on the next several pages are not intended to replace the QuickBooks® documentation or online help, nor are they intended to take the place of your accountant's advice and counsel.** It is assumed that you are familiar with the QuickBooks® software application and, at minimum, its basic functions. *Auburn Electronics Group does not offer technical support for QuickBooks®.*

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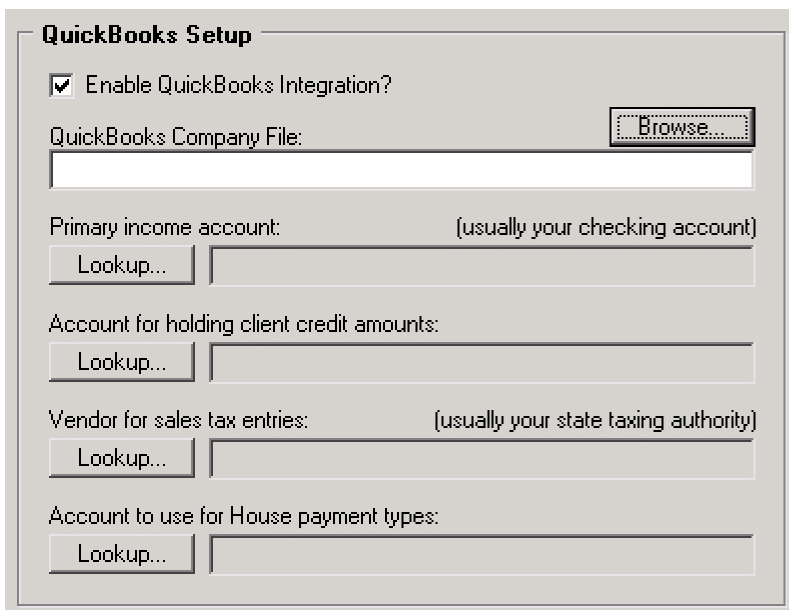
To configure ProSchool to integrate with QuickBooks®:

1. Launch ProSchool (if you haven't already). Click **Setup** (located in the top of the vertical menu button bar on the left of the screen).

2. Click on the **Configure** menu button 

to open the **Configuration** panel.

3. Click on the **Preferences** tab to open that panel, and focus on the **QuickBooks Setup** section:



4. Select the **Enable QuickBooks Integration?** check box.

Configuring QuickBooks® and ProSchool for Seamless Integration

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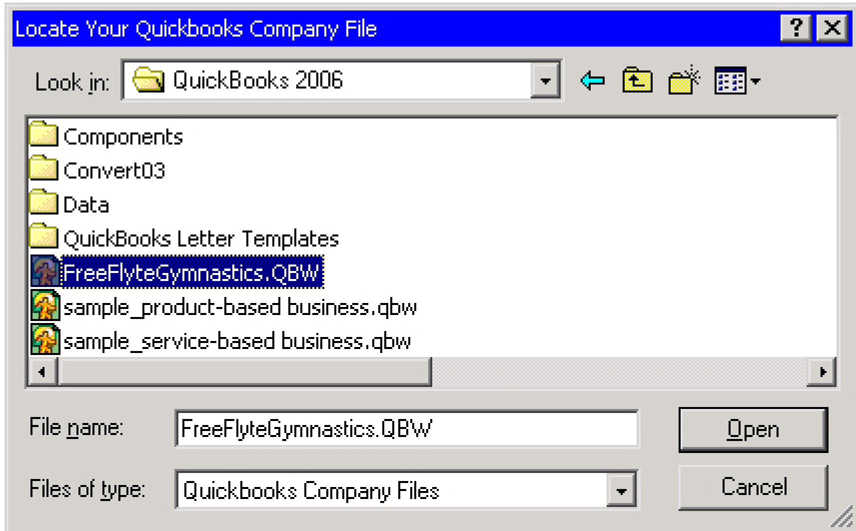
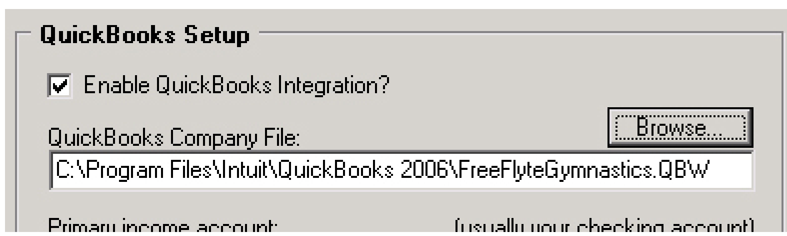
5. Click Browse... to select the subdirectory (folder) where your QuickBooks® company file will be located:



6. Navigate to the appropriate folder (in the above example, "FreeFlyteGymnastics.QBW") and click Open to select the QuickBooks® company file. The **QuickBooks Setup** panel now displays the following:



The location of your subdirectory may be different than shown above, but the important thing is that you find it and configure it so ProSchool knows where to find it too.

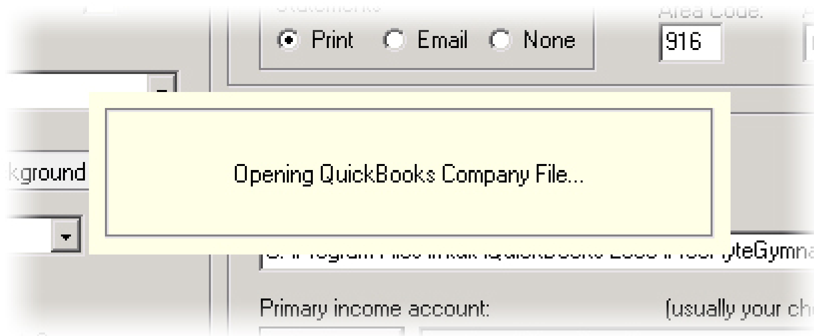
The **QuickBooks Setup** panel also configures these additional four settings:

- your Primary Income Account (usually your checking account);
- the account you will use to hold Client credit amounts ("credit on account");
- your vendor for sales tax entries (usually your state taxing authority), and;
- the account to use for House payment types (such as the commonly used "house credit" account).

Configuring QuickBooks® and ProSchool for Seamless Integration

–continued–

7. Click Lookup... in the **Primary income account:** section. The following message will appear:



At this point, ProSchool may freeze and the following dialog box may open in QuickBooks® (it may open *underneath* the ProSchool window):

ProSchool is not actually frozen; it simply halts until you complete these QuickBooks® dialog boxes, then resumes accordingly.

Configuring QuickBooks® and ProSchool for Seamless Integration

–continued–

Note the questions, "Do you want to allow this application to read and modify this company file?". Select **Yes, always; allow access even if QuickBooks is not running**. (Note that this is the most secure option because it does *not* necessitate opening the company file in QuickBooks® in order to proceed. This way, an office manager could transfer deposits into QuickBooks® without ever having access to the rest of the QuickBooks® data—they would never even see it.)

The purpose of this dialog box is to ensure that the application accessing this QuickBooks® data file (ProSchool) is authorized to do so. Furthermore, your selection enables ProSchool to execute data read / write tasks to the QuickBooks® company file *even when the QuickBooks® application is not running.*

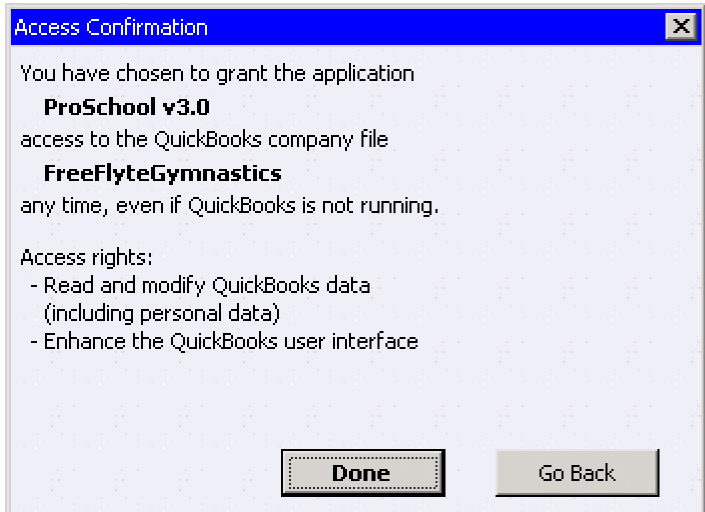
To continue the process, click Continue... in the above dialog box.

A QuickBooks® confirmation dialog box will open:

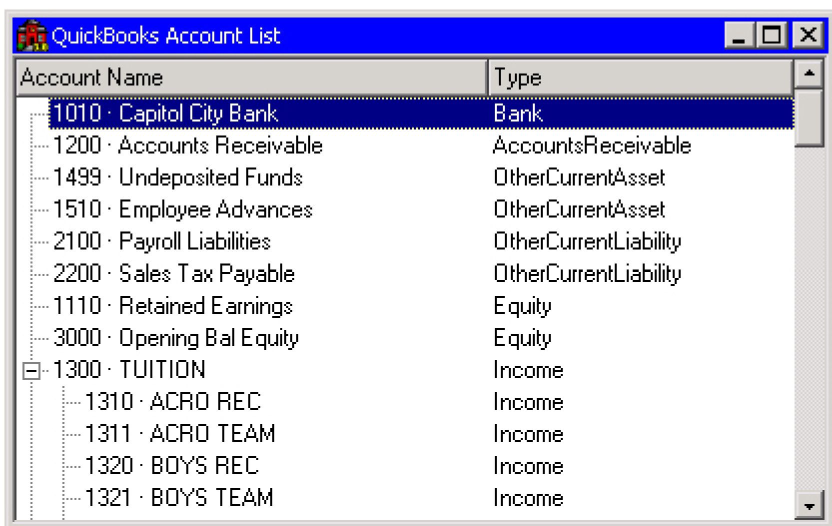
Configuring QuickBooks® and ProSchool for Seamless Integration

–continued–

Click Yes to continue. A final confirmation dialog box will appear (QuickBooks® really, *really* wants to make sure!):



Click **Done** in the dialog box shown above. After a few seconds, you will see a list of all income, expense and miscellaneous accounts:



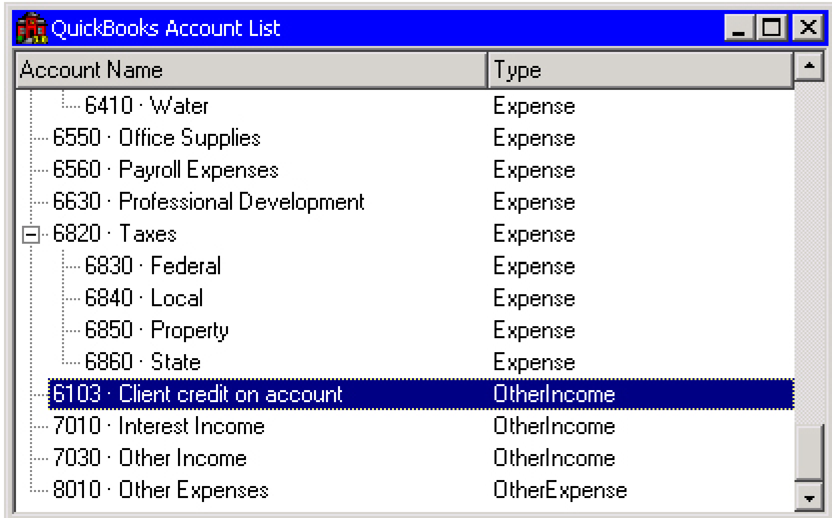
It is from this listing that you will choose your **Primary Income Account**—simply click on it to select it. When you do, your choice will appear in the appropriate field in the **QuickBooks Setup** panel:

In similar fashion, you will configure the remaining three fields.

Configuring QuickBooks® and ProSchool for Seamless Integration

–continued–

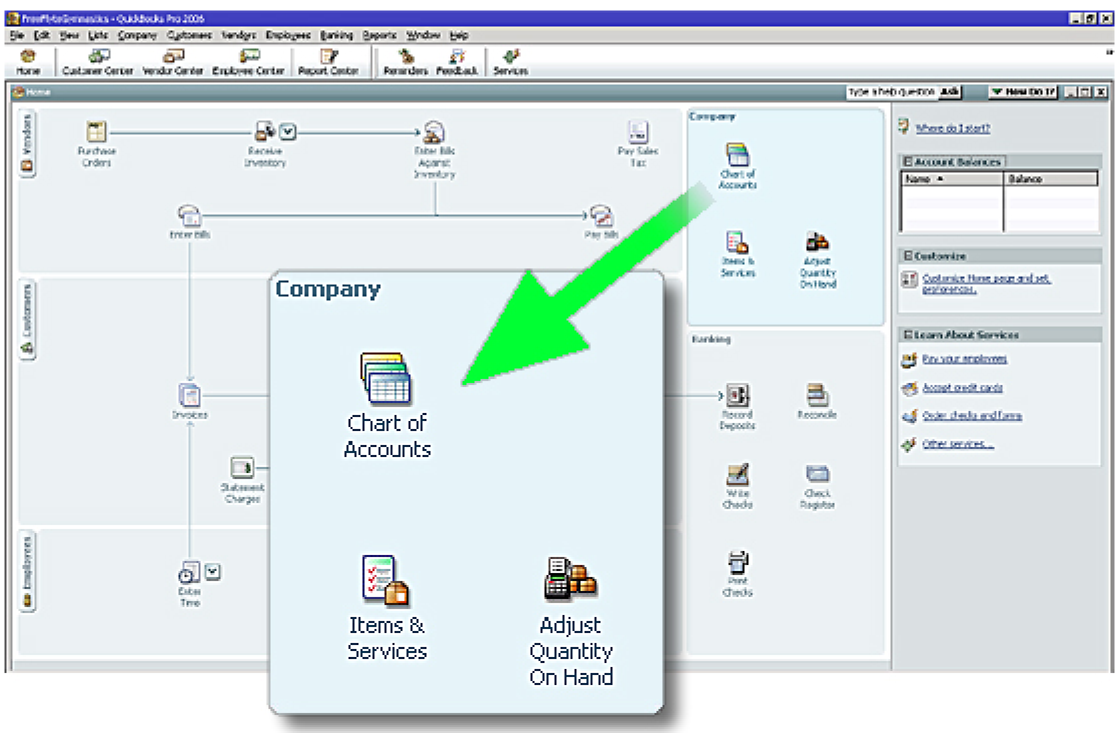
8. Click Lookup... in the **Account for holding Client credit amounts** section. The ProSchool **QuickBooks Account List** opens:



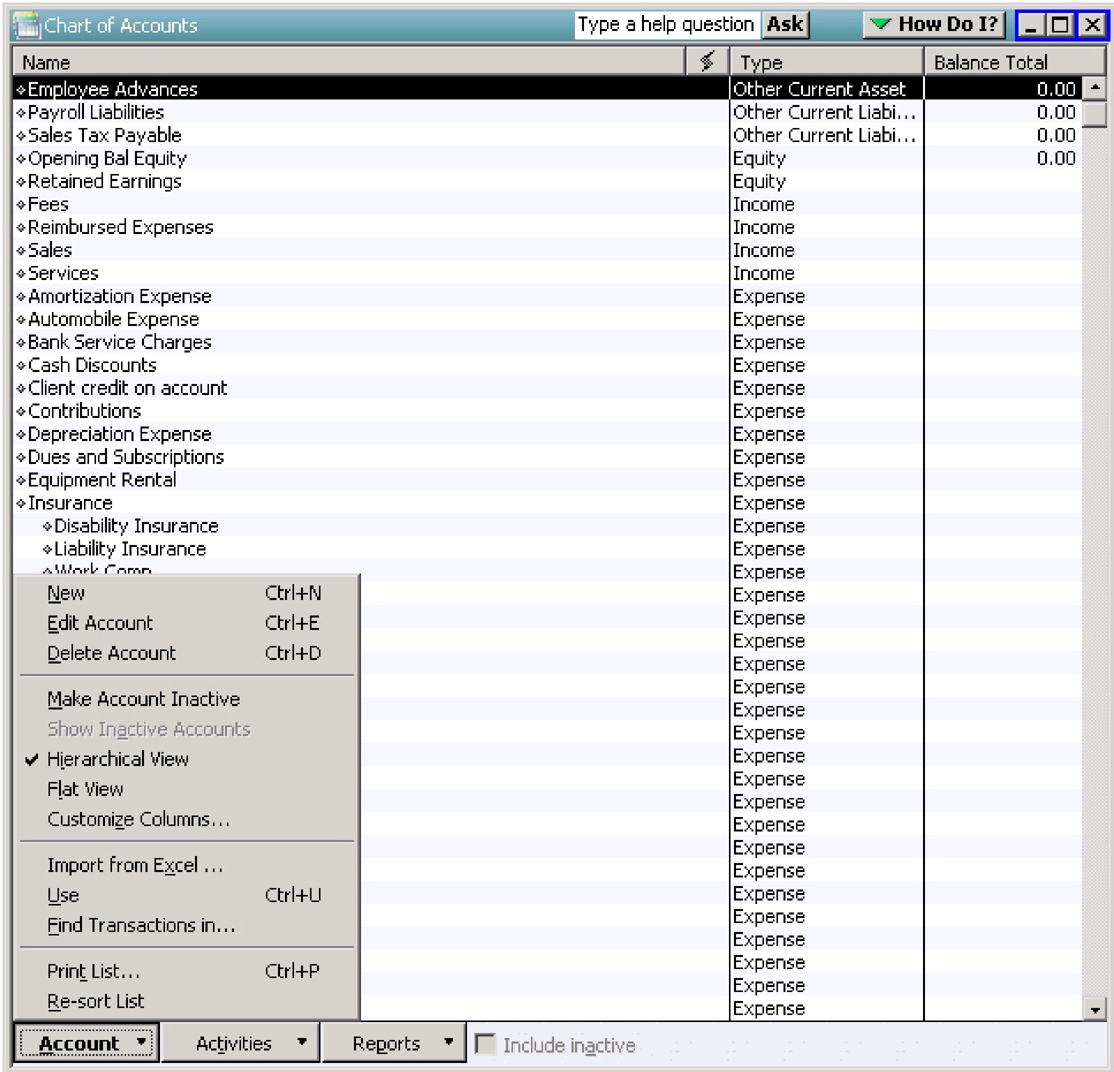
Click on the account you want to use. The account selected in this example is "Client credit on account", an account that was added manually to the List of Accounts. This account is *not* included in the standard QuickBooks® List of Accounts, and is one example of a handful of accounts you may want to add to the List of Accounts.

Here is how you add accounts in QuickBooks®:

In QuickBooks®, in the main "Home" view as shown below, click the **Chart of Accounts** icon:



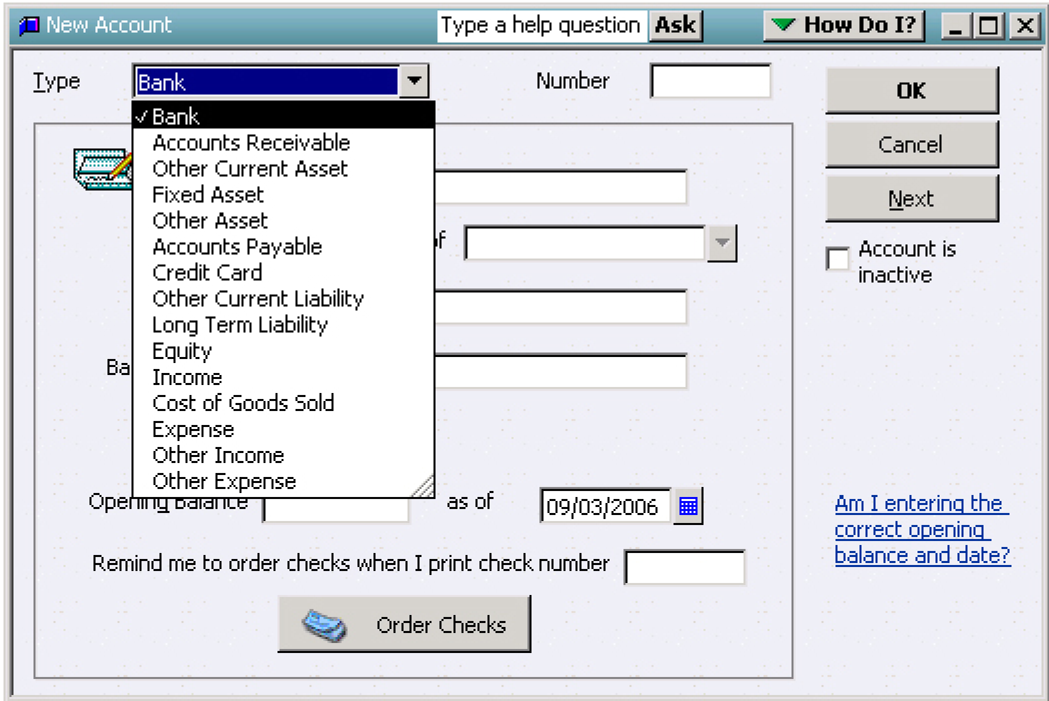
The QuickBooks® **Chart of Accounts** window opens:



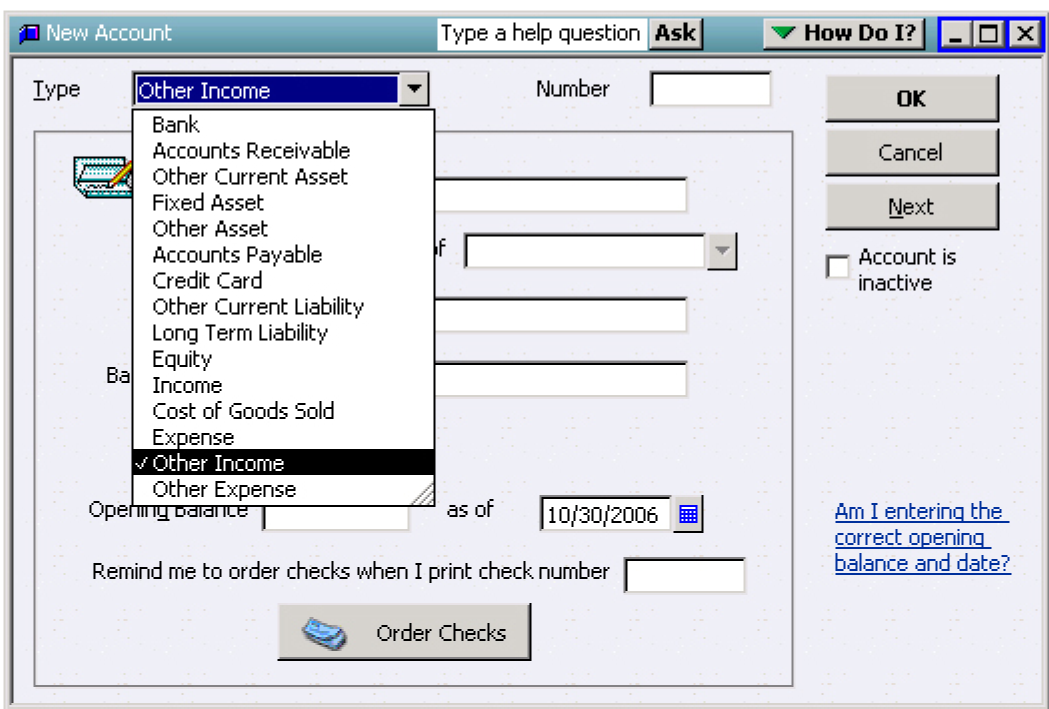
Configuring QuickBooks® and ProSchool for Seamless Integration

–continued–

Click the **Accounts** button in the lower left-hand corner to open the QuickBooks® New Account window:



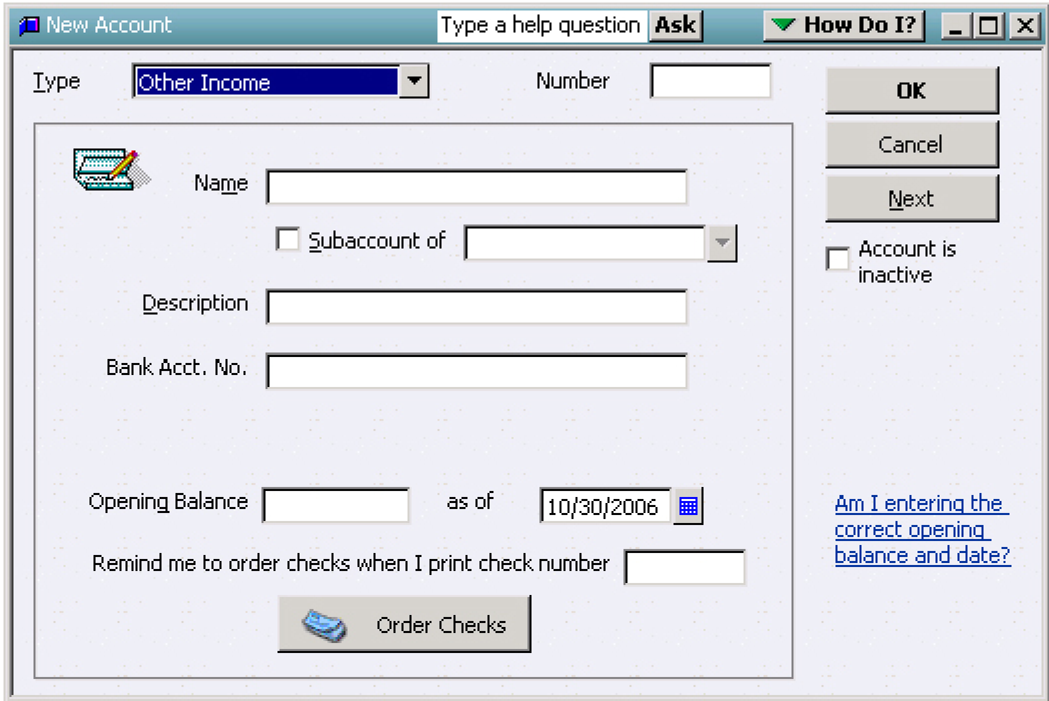
The window opens with the drop-down menu open (as shown above). The type of account you choose from this menu determines what options appear in this menu. For example, to add the “Client credit on account” account, select **Other Income** from the menu:



Configuring QuickBooks® and ProSchool for Seamless Integration

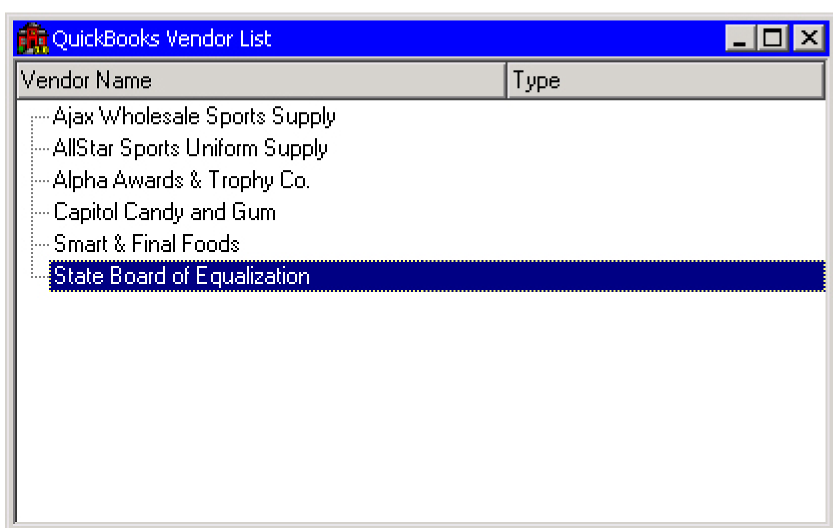
–continued–

The QuickBooks® **New Account** window changes the fields available to display only those appropriate for an "other income" type of account:



Simply add the name of the account ("Client credit on account" in this example), add a description, if you wish, and click **OK** to create the new account in QuickBooks. The new account will now be displayed in the QuickBooks® **Chart of Accounts** window. You can add as many accounts as you like (income, expense or other types), and you can also delete any accounts that you find are not needed. However, before deleting any accounts, we suggest working with the given set of standard QuickBooks® accounts for a month or two (in addition to any you add) to see if any of those "unneeded" accounts end up being useful.

9. Click Lookup... in the **Vendor for sales tax entries:** section. The ProSchool **QuickBooks Vendor List** window opens:

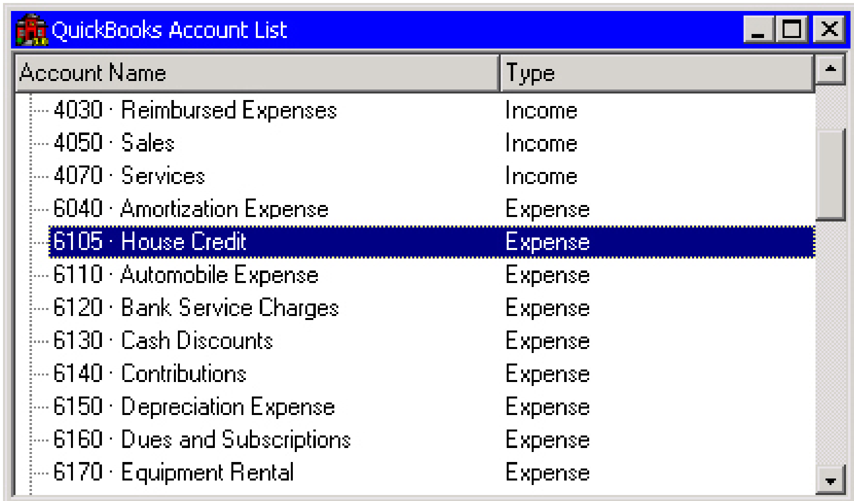


Configuring QuickBooks® and ProSchool for Seamless Integration

–continued–

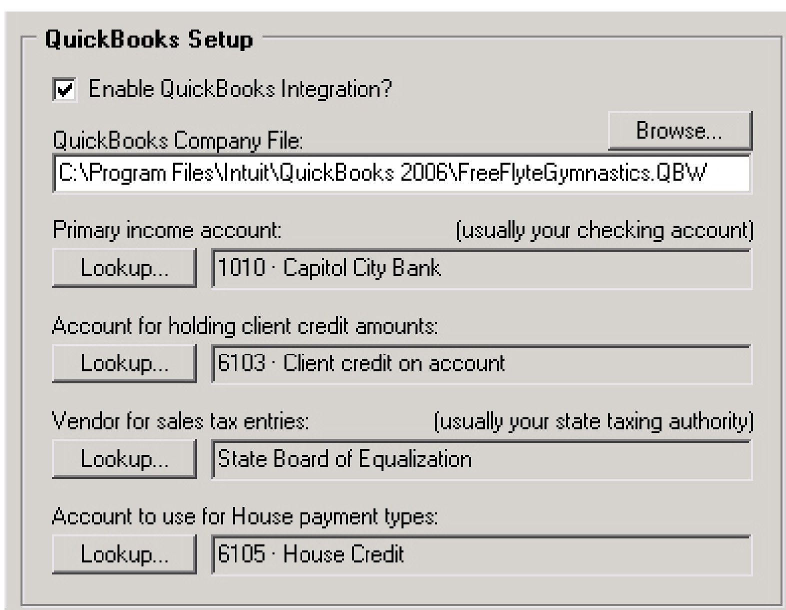
Note that this list, as with the previous **QuickBooks Accounts List**, is populated by vendors that you configure in the QuickBooks® Vendor Center (i.e. this list is *not* built from within ProSchool). The list above includes the California State Board of Equalization, which is the taxing authority in California (where FreeFlyte Gymnastics operates).

10. Click Lookup... in the **Account to use for House payment types:** section to open the now-familiar ProSchool **QuickBooks Accounts List** window:



The account selected in this example is “House Credit”, an account that was added manually (as demonstrated above). In other words, this account is *not* included in the standard QuickBooks® List of Accounts.

After you’ve completed the configuration of ProSchool’s **QuickBooks Setup** panel, it should look something like this:



Next, we’ll make sure our ProSchool income accounts are linked to a corresponding account (or sub-accounts) in QuickBooks®.

Configuring QuickBooks® and ProSchool for Seamless Integration

–continued–

Since ProSchool handles the receivables side of the business, having detailed income accounts is an accurate way to see which departments and activities are profitable, and which are not.

ProSchool has several Department codes, each of which is associated with a specific type of income. The “Codes Summary” report below itemizes the Department codes for our sample school, FreeFlyte Gymnastics:

Printed on 9/12/2006 Page: 1

Codes Summary

for: Departments

Department	QuickBooks Account
ACRO REC	
ACRO TEAM	
ASSESSMENT	
BIRTHDAY PARTIES	
BOUTIQUE	
BOYS REC	
BOYS TEAM	
CAMPS	
CHEER TEAM	
CHEER/TUMBLE REC	
FACILITY RENTAL	
FIELD TRIPS	
GIFT CERTIFICATE	
GIRLS REC	
GIRLS TEAM	
HOME SCHOOL	
KINDERGYM	
LATE FEE	
MEMBERSHIP	
NSF CHECK	
OPEN GYM	
PARENTS NIGHT OUT	
REFUND	
REFUND BOUTIQUE	
RETURNED CHECKS	
SALES TAX	
SAVINGS BOOK	
SPECIAL EVENTS	
TUITION	
USAG FEES	

Number of records: 30

For each of these codes, there will be a corresponding account, or subaccount, set up in QuickBooks®. Whether or not you use sub-accounts is up to you.

Configuring QuickBooks® and ProSchool for Seamless Integration

–continued–

Most ProSchool users use accounts for the unique department codes, then create sub-accounts for related accounts that logically fall under the umbrella of one of these "primary" accounts.

For example, in the report above, "Tuition" is one of the department codes, yet there are several other department codes that could logically be set up as sub-accounts under the Tuition account. If we follow this scheme for all department codes, the result could be something like this:

Tuition
  Acro Rec
  Acro Team
  Boys Rec
  Boys Team
  Cheer Team
  Cheer/Tumbling
  Girls Rec
  Girls Team
  Home School
  KinderGym
  Open Gym

Special Events
  Birthday Parties
  Camps
  Field Trips
  Parents Night Out

Boutique
  Refund Boutique

The remaining department codes could each be their own account, without any sub-accounts:

Assessment
Late Fee
Membership
NSF Check
USAG Fees

Facility Rental
Gift Certificates
Refund
Returned Checks
Sales Tax
Savings Books

You can set these up any way you like in QuickBooks®; whatever is most logical for you. We also suggest you consult your accountant for input if you have any questions.

Configuring QuickBooks® and ProSchool for Seamless Integration

–continued–

After entering these accounts and sub-accounts into QuickBooks®, the QuickBooks® **Chart of Accounts** window will look something like this (bear in mind there are several other accounts in the chart of accounts; we're focusing on the ones just entered in our example explained above):

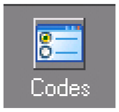
1200 · Accounts Receivable	Accounts Receivable	0.00
1300 · TUITION	Income	
1310 · ACRO REC	Income	
1311 · ACRO TEAM	Income	
1320 · BOYS REC	Income	
1321 · BOYS TEAM	Income	
1330 · CHEER TEAM	Income	
1331 · CHEER TUMBLE/REC	Income	
1340 · GIRLS REC	Income	
1341 · GIRLS TEAM	Income	
1350 · HOME SCHOOL	Income	
1360 · KINDERGYM	Income	
1370 · OPEN GYM	Income	
1400 · SPECIAL EVENTS	Income	
1401 · BIRTHDAY PARTIES	Income	
1402 · CAMPS	Income	
1403 · FIELD TRIPS	Income	
1404 · PARENTS NIGHT OUT	Income	
1410 · MEMBERSHIP	Income	
1411 · USAG FEES	Income	
1412 · ASSESSMENT	Income	
1420 · LATE FEE	Income	
1421 · NSF CHECK	Income	
1422 · RETURNED CHECKS	Income	
1430 · SALES TAX (CA)	Income	
1440 · GIFT CERTIFICATES	Income	
1450 · SAVINGS BOOK	Income	
1460 · BOUTIQUE	Income	
1461 · REFUND BOUTIQUE	Income	
1470 · FACILITY RENTAL	Income	
1480 · REFUND	Income	
1499 · Undeposited Funds	Other Current Asset	0.00

Next, we'll link the ProSchool department codes with the above QuickBooks® accounts and sub-accounts.

Configuring QuickBooks® and ProSchool for Seamless Integration

To configure (link) ProSchool's department codes with the QuickBooks® accounts and sub-accounts:

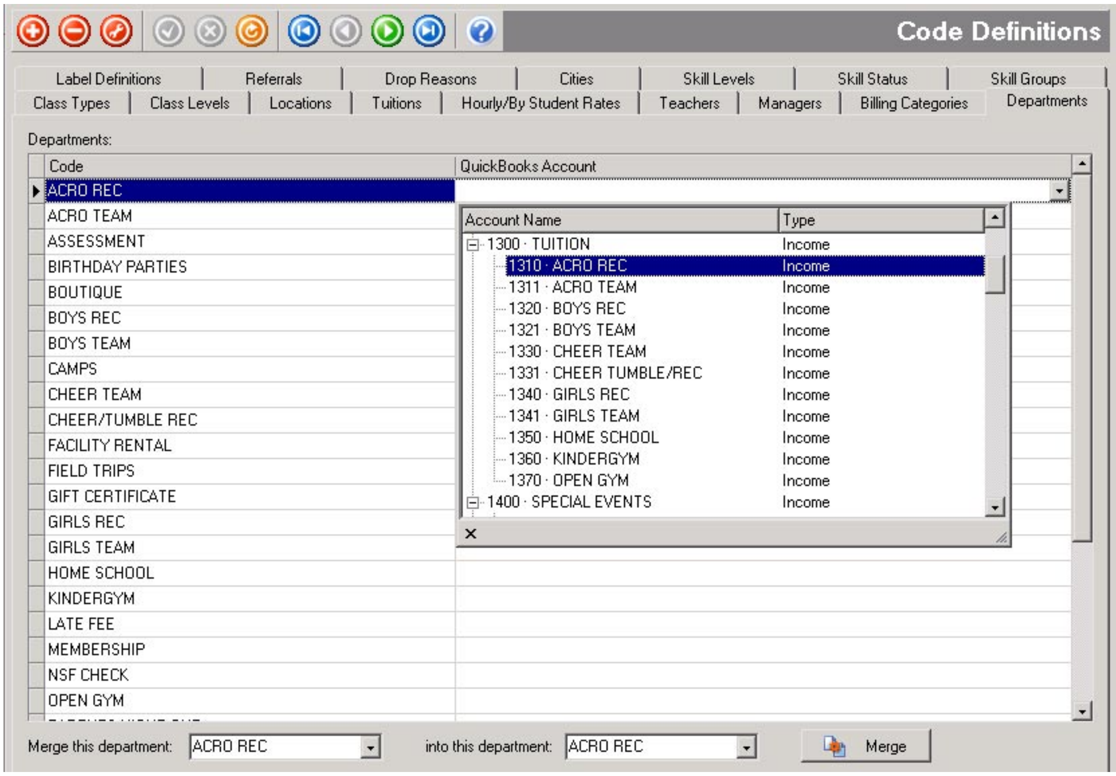
1. Click **Setup** (located in the top of the vertical menu button bar on the left of the screen).

2. Click 

(the **Codes** menu button) to open the **Code Definitions** panel.

3. Click on the **Departments** tab:

–continued–



Note the two columns: ProSchool's **Code** column is on the left, listing all department codes you've set up; the **QuickBooks Account** column is on the right (this column will only appear if you have selected the **Enable QuickBooks Integration?** check box described in the previous section).

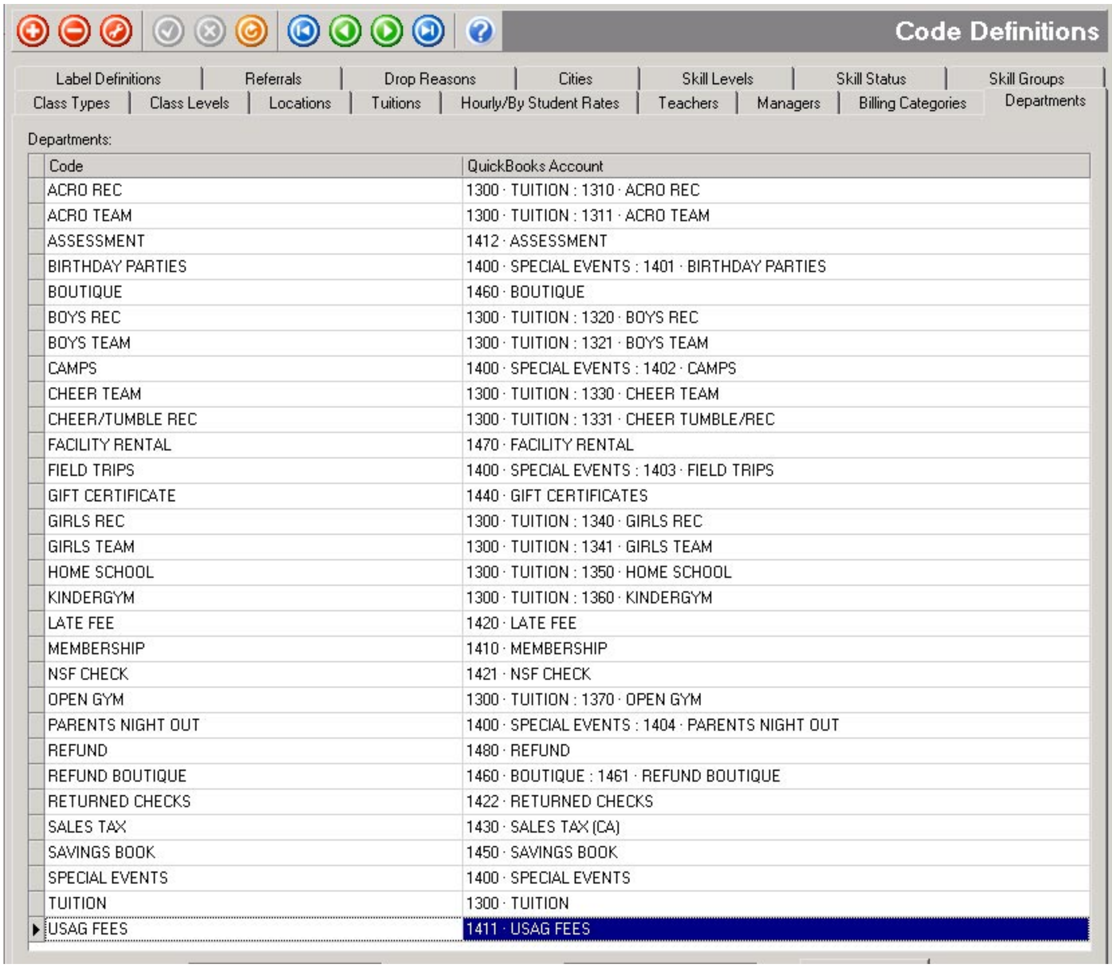
4. Use the drop-down menu in the **QuickBooks Account** column, as shown above, for each department code, which will link it to the corresponding QuickBooks® account or subaccount.

Hint: If you just came from QuickBooks® and set up these codes while the Codes Definitions window was open, the new accounts you set up in QuickBooks® will not display on this pull-down menu. It simply needs to be refreshed. Click on another button in the vertical button bar on the left (such as **Labels** *or* **Configure***), then click again on the* **Codes** *button, and* **Yes** *when the dialogue box asks it it's OK to connect with QuickBooks®. The new accounts will now appear in the drop-down menu.*

Configuring QuickBooks® and ProSchool for Seamless Integration

–continued–

After you assign a QuickBooks® account to each ProSchool department code, the result will look something like this (we've resized the window to show all the department codes we've been working with in this section):



Code	QuickBooks Account
ACRO REC	1300 · TUITION : 1310 · ACRO REC
ACRO TEAM	1300 · TUITION : 1311 · ACRO TEAM
ASSESSMENT	1412 · ASSESSMENT
BIRTHDAY PARTIES	1400 · SPECIAL EVENTS : 1401 · BIRTHDAY PARTIES
BOUTIQUE	1460 · BOUTIQUE
BOYS REC	1300 · TUITION : 1320 · BOYS REC
BOYS TEAM	1300 · TUITION : 1321 · BOYS TEAM
CAMPS	1400 · SPECIAL EVENTS : 1402 · CAMPS
CHEER TEAM	1300 · TUITION : 1330 · CHEER TEAM
CHEER/TUMBLE REC	1300 · TUITION : 1331 · CHEER TUMBLE/REC
FACILITY RENTAL	1470 · FACILITY RENTAL
FIELD TRIPS	1400 · SPECIAL EVENTS : 1403 · FIELD TRIPS
GIFT CERTIFICATE	1440 · GIFT CERTIFICATES
GIRLS REC	1300 · TUITION : 1340 · GIRLS REC
GIRLS TEAM	1300 · TUITION : 1341 · GIRLS TEAM
HOME SCHOOL	1300 · TUITION : 1350 · HOME SCHOOL
KINDERGYM	1300 · TUITION : 1360 · KINDERGYM
LATE FEE	1420 · LATE FEE
MEMBERSHIP	1410 · MEMBERSHIP
NSF CHECK	1421 · NSF CHECK
OPEN GYM	1300 · TUITION : 1370 · OPEN GYM
PARENTS NIGHT OUT	1400 · SPECIAL EVENTS : 1404 · PARENTS NIGHT OUT
REFUND	1480 · REFUND
REFUND BOUTIQUE	1460 · BOUTIQUE : 1461 · REFUND BOUTIQUE
RETURNED CHECKS	1422 · RETURNED CHECKS
SALES TAX	1430 · SALES TAX (CA)
SAVINGS BOOK	1450 · SAVINGS BOOK
SPECIAL EVENTS	1400 · SPECIAL EVENTS
TUITION	1300 · TUITION
USAG FEES	1411 · USAG FEES

5. Double-check your selections above to make sure they're linked to the correct QuickBooks® account.

Congratulations! ProSchool has been fully configured for QuickBooks® integration. You will find that the time you have invested in doing so will pay of handsomely!

The procedure of processing payments and deposits, which is the step which transfers this information to QuickBooks®, is described in a later section entitled, "Processing Deposits and Transactions" on page 265.

Defining Your Curriculum

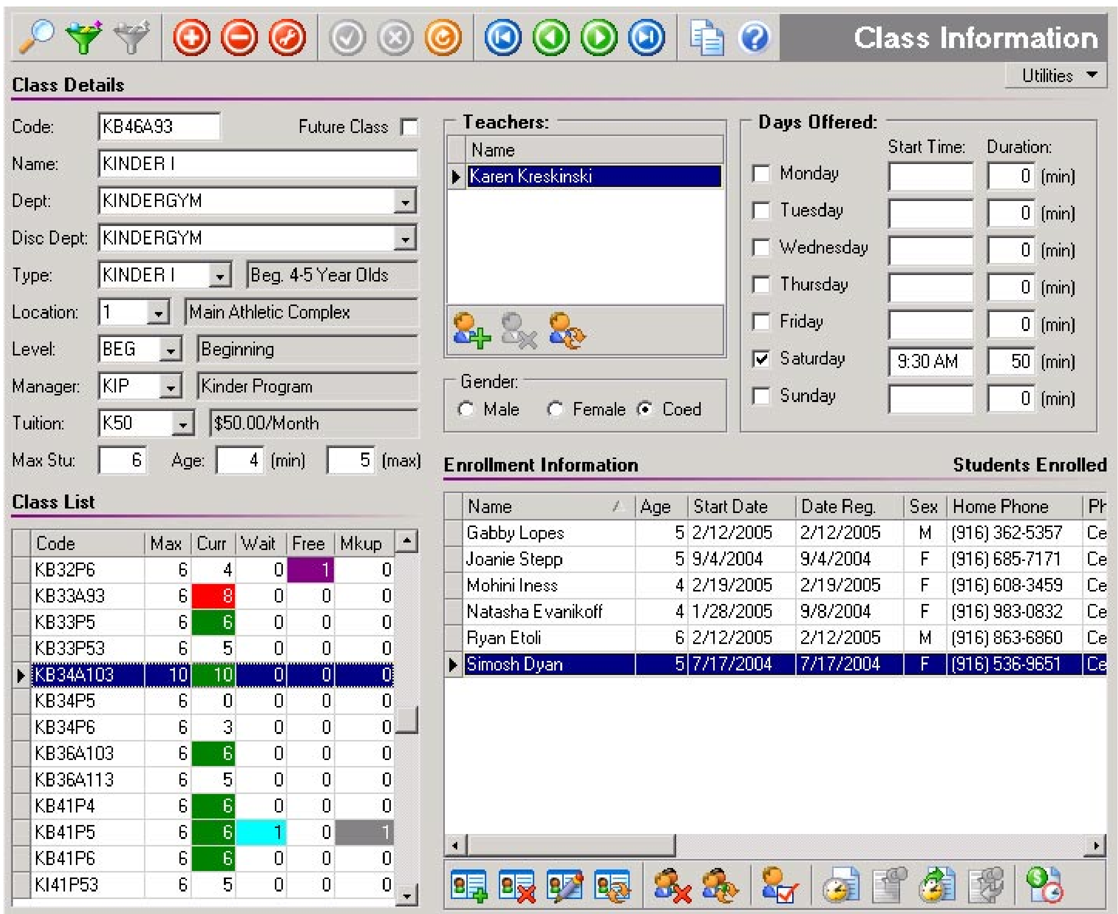
SETTING UP YOUR SCHOOL'S CLASSES

Now that you have configured ProSchool's various codes, you are ready to add and configure your classes. This is the final step in building a solid foundation for your School; after classes have been configured, you will be ready to build your Family and Student databases.

To add and configure classes:

1. Click Tasks (the **Tasks** button on the left) to reveal the task menu buttons.

2. Click Classes (the **Classes** menu button) to open the **Class Information** panel:



Defining Your Curriculum

-continued-

Note the color coding used in some of the Student counts in the **Classes:** section (lower left):

4 – if class enrollment currently *equals* the class maximum (class is full), the number of Students will be highlighted in green;

7 – if enrollment currently *exceeds* the class maximum, the number of Students will be highlighted in red;

1 – if there are one or more Students on the waiting list, the number is highlighted in aqua;

1 – if there are one or more Students scheduled to take this class free (no charge), the number of students is highlighted in purple;

1 – if there are one or more Students scheduled for a make up in this class, the number of students is highlighted in gray.

3. Click  (the "add a new record" button) to clear the entry fields for a new class entry.

4. In the **Code:** field, enter a unique class code that will uniquely identify *this* class (any combination of alphanumeric characters, up to eight).

5. In the **Name:** field, enter the class name (any combination of alphanumeric characters, up to a maximum of 20).

6. If this class is a future class—that is, a class that is not currently in progress but which will start on a specific date in the future (such as a class that begins next month)—select the **Future Class** box (below, left). Note that the listing for any future class in the **Classes:** section is highlighted in yellow for easy identification (below, right):

Code	Max	Curr	Wait	Free	Mkup
KB43A10	6	5	0	0	0
KB43A11	6	4	0	0	0

The class listing will remain highlighted in yellow until the **Future Class** box is unselected.

Note the following distinctions about future classes:

- ProSchool does not require any date entry with respect to the status of a class (it is either "current" or "future", determined solely by whether or not the option is selected);
- functions relating to classes in general—such as viewing enrollment lists, enrolling Students, putting Students on the waiting list and so on—are exactly the same for future classes as for current classes;
- changing the current / future status of a class is a change that must be saved by clicking  just as with other changes you might make to a class;
- students enrolled in future classes are not billed for those classes.

Defining Your Curriculum

-continued-

Note—Selections for the following fields will be based on the codes you configured for your School:

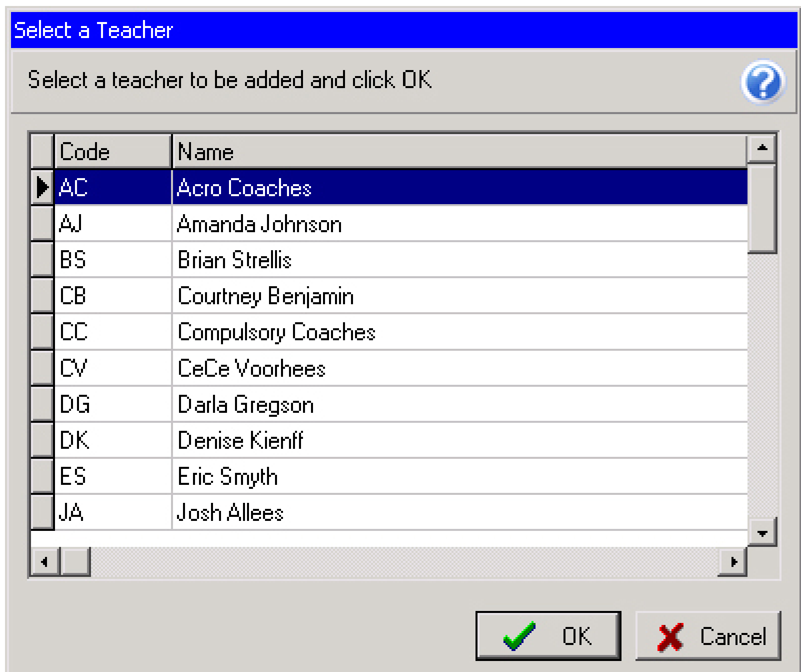
7. In the **Dept:** field, click on the down-arrow and select a department code.

8. In the **Disc Dept:** field, select the *same* department you selected in step #7, above, UNLESS you need to track the discounts offered for this class separately. This is not a feature that ProSchool users typically use, but it is there if you need it for accounting reasons.

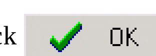
9. Use the drop-down menus in the **Location:**, **Level:**, **Manager:** and **Tuition:** fields to make the appropriate choices.

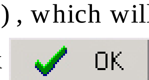
10. Enter the appropriate data in the **Max Stu:** (maximum Students), **Min Age:** and **Max Age:** fields.

11a. In the **Teachers:** box, click  to open the **Select a Teacher** menu pane:



This is where you select the teacher(s) who will teach this specific class. Here's how:

11b. Select a teacher by clicking on the name, then click  to add them to the **Teachers:** box. Repeat this process if you have multiple teachers.

11c. If you want to replace an existing teacher for this class with a different teacher, here's a time saver: click on the teacher you want to remove from the list, then click  (the "replace" button), which will open the **Select a Teacher** menu. Click on the replacement teacher and click  to add that teacher to the **Teachers:** box. The other teacher will automatically be removed and replaced with the new teacher you selected.

11d. To remove a teacher from the list, click on their name to select it and click  (remember, this action only removes that particular teacher from the pool of teachers who teach this specific class—**not** from your school's database of teachers).

Defining Your Curriculum

-continued-

12. In the **Gender:** section, select the gender of the Students for this class ("**Male**", "**Female**" or "**Coed**").

13. In the **Days Offered:** section, check the days this class will be offered, the start time and the duration (class length) in minutes.

14. When you are done configuring this class, click  to save it.

15. If you want to add another class that is similar to this class in one or more respects (such as one that is identical other than the day and time it is held), ProSchool makes it easy to replicate classes. To use the Copy Record function, just click  while in the class you want to replicate, and ProSchool creates a new class that is identical *except* for the class code (since each class must have a unique identifier code). You can now enter a new (i.e, unique) class code, modify the details of the new class as you wish, then click  to save it.

The **Enrollment Information / Students Enrolled** section in the lower right-hand section of this **Class Information** panel will be discussed below in the section entitled, "Enrolling Students In Classes".

Hint: After you have configured all your classes, it is strongly recommended that you print a Class Summary report (to do so, refer to the section below entitled "Generating Reports in ProSchool"). Check your classes carefully to make sure class times and teacher commitments do not overlap.

Reviewing Teacher and Class Schedules

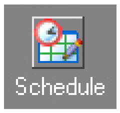
REVIEWING TEACHER / CLASS SCHEDULES

ProSchool now includes a Teacher / Class Schedule matrix. This useful tool offers you a quick and comprehensive way to view Teacher and Class schedules at a glance, by day of the week. In addition, it's a great way to prevent scheduling overlaps.

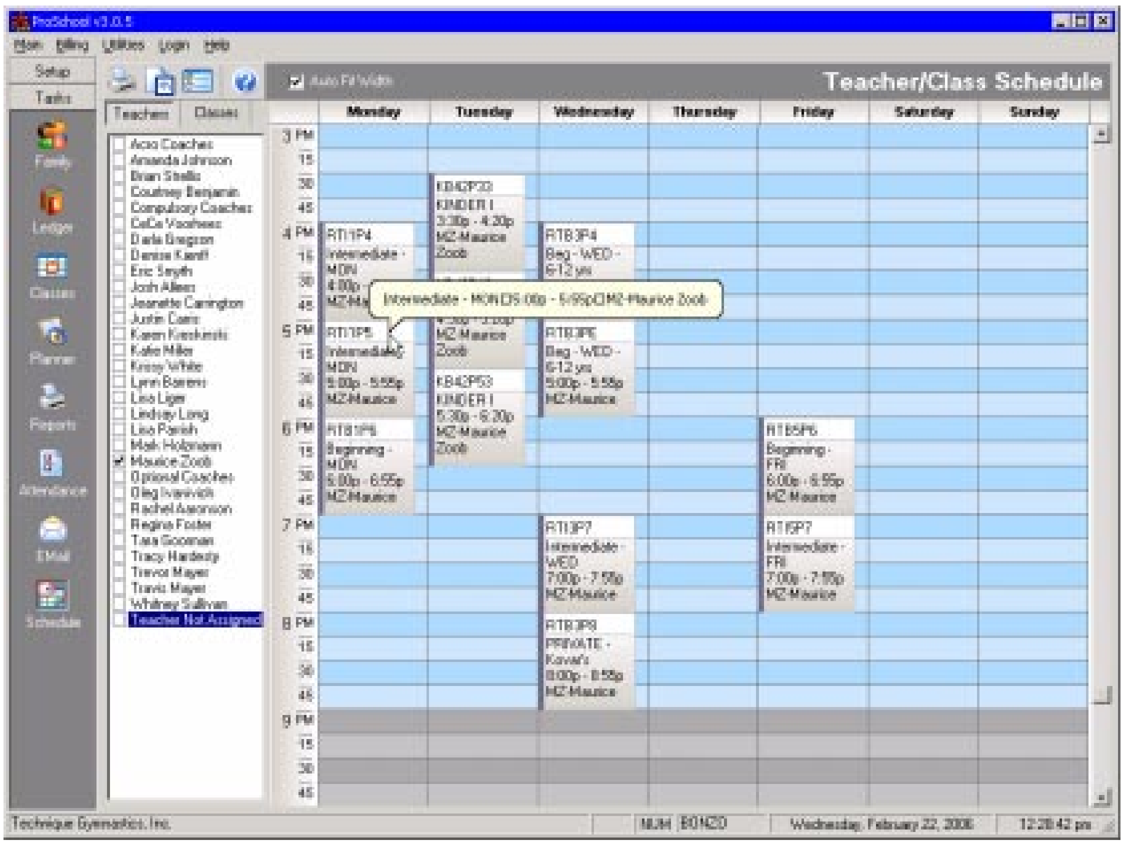
To view the Teacher/Class Schedule matrix:

1. Click 

(the **Tasks** button on the left) to reveal the task menu buttons.

2. Click 

(the **Schedule** menu button) to open the **Teacher/Class Schedule** panel:



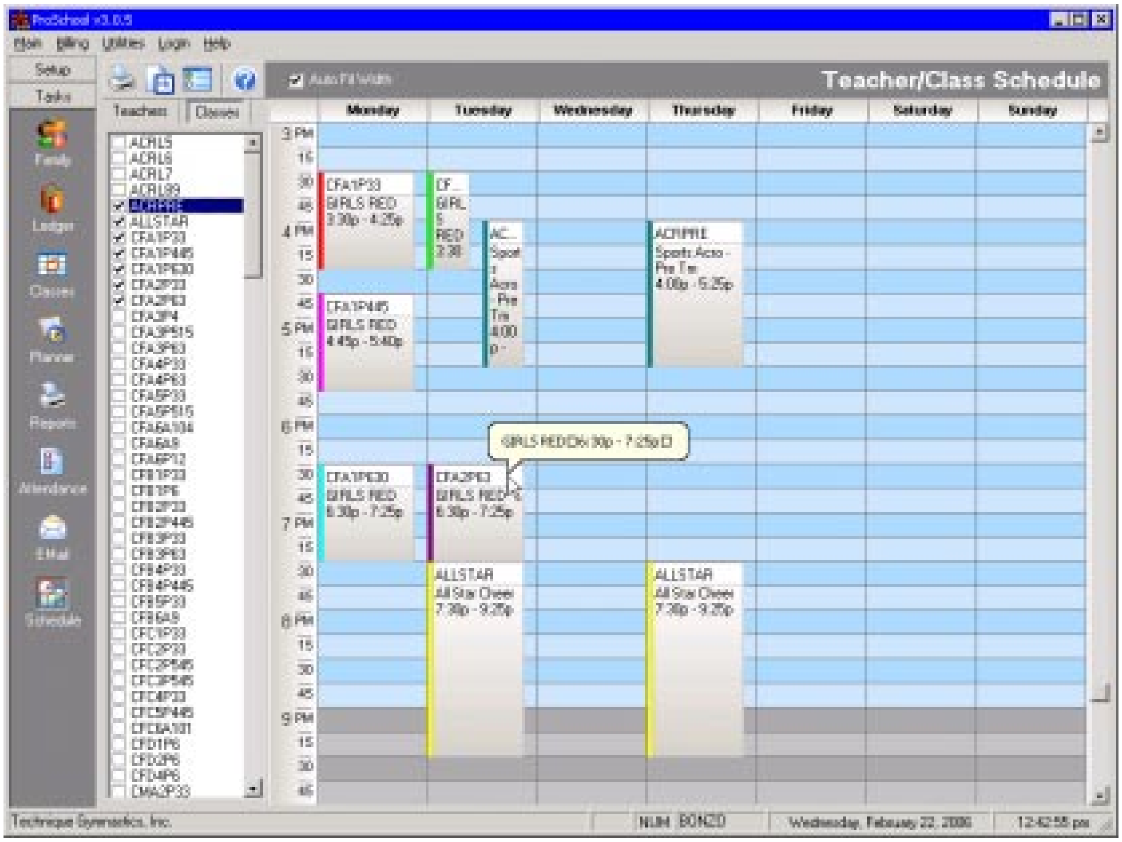
3. To view classes taught by a specific teacher, click the **Teachers** button (located in the upper-left portion of the window, right under the print icon). A list of your school's instructors will appear in the menu pane (see above).

4. Select any teacher by clicking in the check box to the left of the teacher's name. The classes for that teacher will appear, as shown above. To amplify details of any class, simply roll your mouse cursor over the box in question, and a yellow text box will appear with additional information.

Reviewing Teacher and Class Schedules

-continued-

5. To see how classes plot out across your week, click on the **Classes** button (next to the **Teachers** button) to display the classes view:



To illustrate the usefulness of this feature, the above view shows seven classes selected. Note that each of the classes is coded a different color at its left, to make it easier to tell one from another. Multiple occurrences of the same class (that is, single-session classes that occur more than once within a week) use the same color, as shown above with the “yellow” classes.

Whether displaying teachers or classes, you can “stack” as many of either as you like... or “unstack” teachers or classes simply by deselecting (un-clicking) them in the left menu.

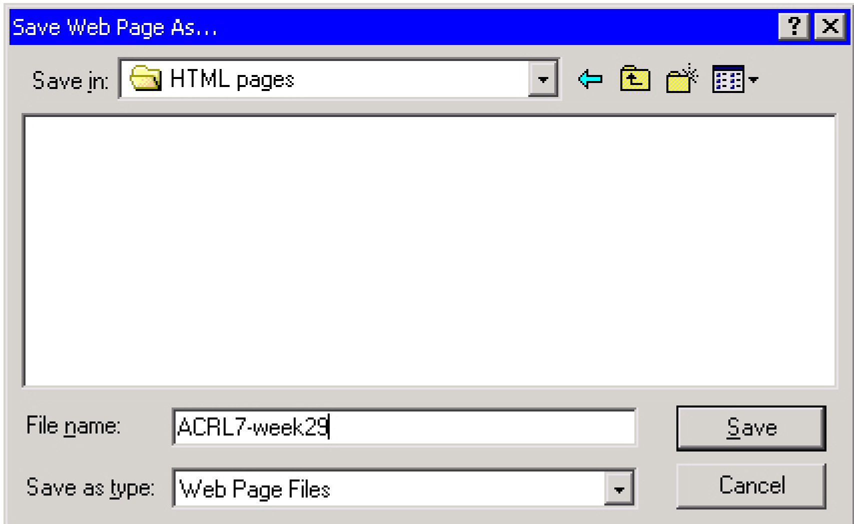
6. Printing a hard copy of the scheduler’s current view is easy; click  to print the particular view based on the classes or teachers selected. This is useful for a variety of reasons:

- a prospective client asks for a print out of classes in which they’re interested;
- a family with multiple students requests a schedule of all classes they are enrolled in;
- you need to print out class schedules for individual teachers;
- you update the times and / or days for a particular class and want to distribute the changes to one or several teachers.

Reviewing Teacher and Class Schedules

-continued-

7. If you want to insert the current scheduler view into your website, ProSchool will generate the HTML code necessary to do so, and ask you to save it under a name of your choosing. To do so, configure the schedule display with the Teachers or Classes view of your choice, then click  to open the **Save Web Page As...** window:



Enter a name, click **Save** and you're done. No cutting or pasting is required to build the web page you want; ProSchool instantly generates the HTML page code (the native language in which web pages are written) for the teacher or class schedule view you created. Web pages are saved using the universally standard ".htm" extension.

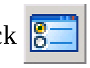
Then, you simply open the saved page in your web design software (Front Page, GoLive, DreamWeaver, etc.), modify it as desired (adding a masthead, a footer, etc.), set up the links to the page, and upload it to your website's server.

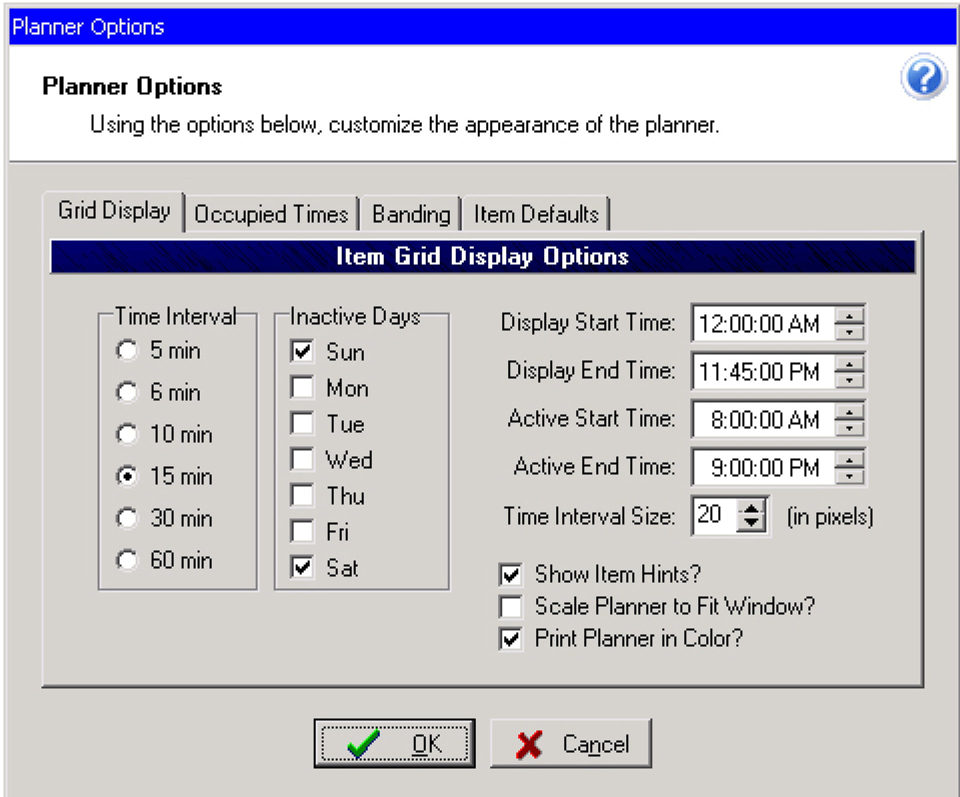
Here are some of the more typical ways ProSchool users make use of this feature:

- to post individual class schedules (all occurrences of a single class that occur throughout a given week);
- to post class schedules that have been changed or updated;
- to post schedules for individual teachers, in a password-protected section of the website, so teachers can access their schedules from any computer connected to the internet.

Reviewing Teacher and Class Schedules

-continued-

8a. To change the way teachers and classes are displayed, click  to open the **Planner Options** window:



Note there are four tabbed sections, as follows:

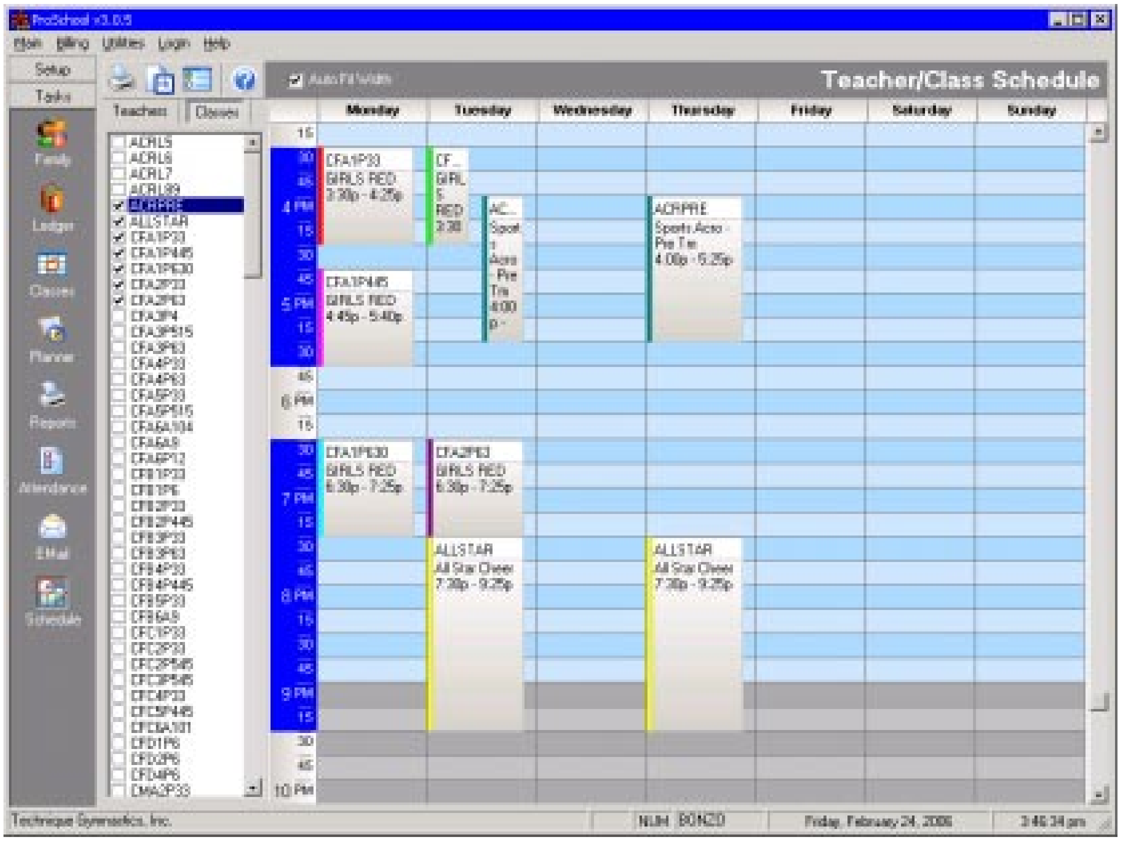
8b. The **Grid Display** section (above) allows you to adjust several parameters that affect the sizing and “resolution”: time interval, inactive days, display start and end time, time interval size, etc.

8c. The **Occupied Times** section allows you to configure the *color* of the vertical time display band that runs along the left of the matrix. You can set the color of the occupied classes times, and the font color of the time legends within it:

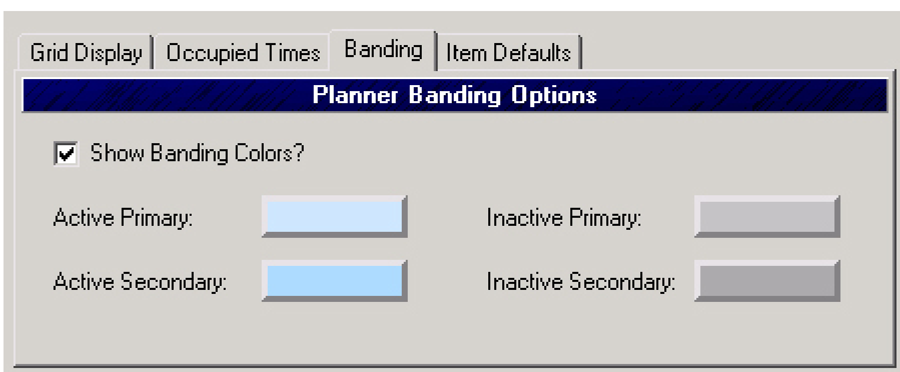
Reviewing Teacher and Class Schedules

-continued-

This option gives an at-a-glance view of the times when classes are occurring, or when the selected teachers' classes occur. Furthermore, the **Font Color** setting allows you to select the font color appearing within the "occupied times" area. The highlighted area, as defined in the view above, would look like this:



8d. The **Banding** section allows you to set the colors of the rows to suit your tastes:

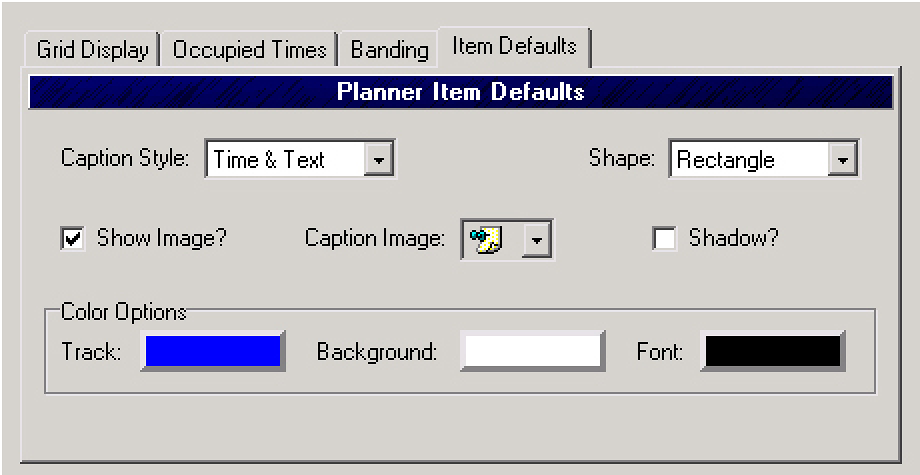


Note the two different blue colors above ("Active Primary" and "Active Secondary") and how they correspond to the colors in the screenshots of the **Teachers/Class Schedule** window shown in the screenshot near the top of this page. The lighter and darker gray colors selected above ("Inactive Primary" and "Inactive Secondary") correspond with the "inactive" part of the Scheduler; that is, the section you defined in the "Active Start Time" and "Active End Time" as configured in the **Grid Display** panel of this window (as explained on page 137).

Reviewing Teacher and Class Schedules

-continued-

8e. The **Item Defaults** section allows you to adjust several parameters that affect the appearance of the **Teachers/Class Schedule** window:



Building Your ProSchool Database

ADDING FAMILIES TO YOUR SCHOOL'S DATABASE

The final step in setting up ProSchool for your school is adding Families. In ProSchool, "Families" are parents or guardians of Students, as well as the Students themselves.

Hint: If you've run previous versions of ProSchool, please note that the term "Clients" has been replaced by the term "Families" (Clients and Students combined).

Before you can build your Family and Student databases—and begin class enrollment—you must already have *configured ProSchool codes* and *set up classes* for your School. If you have not, proceed to the previous sections entitled "Setting Up Basic Codes", "Configuring Tuition Codes and Discounts", "Creating Billing Categories" and "Setting Up Your School's Classes").

You are now ready to enter Families and Students—in that order.

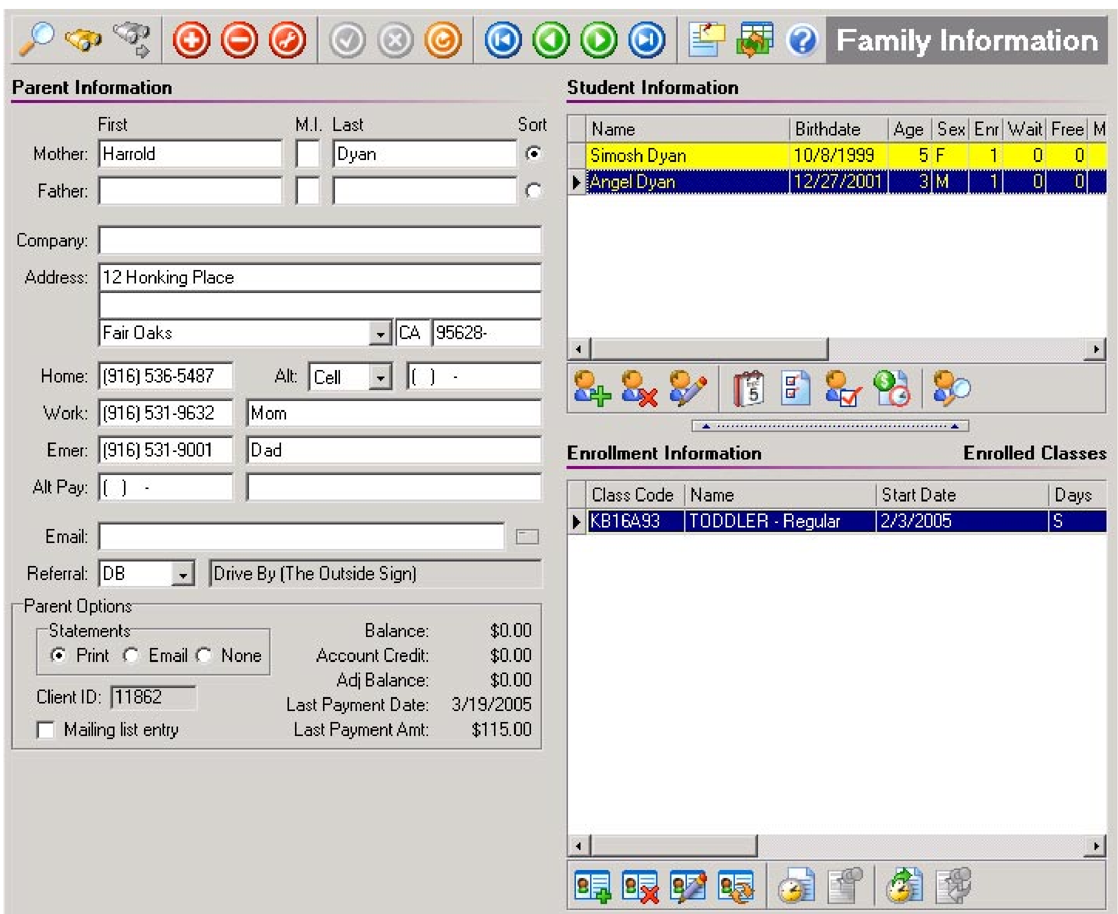

To bring up the Family Information window:

1. Click 

(the **Tasks** button on the left) to reveal the task menu buttons.

2. Click 

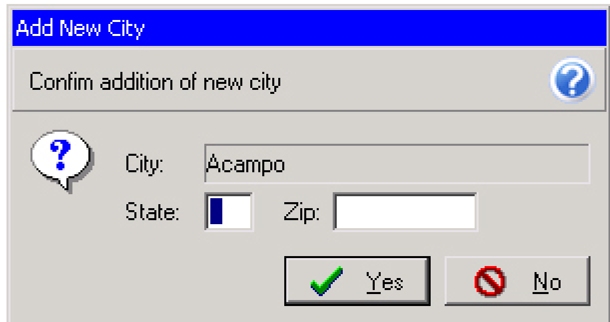
(the **Family** menu button) to open the **Family Information** panel:



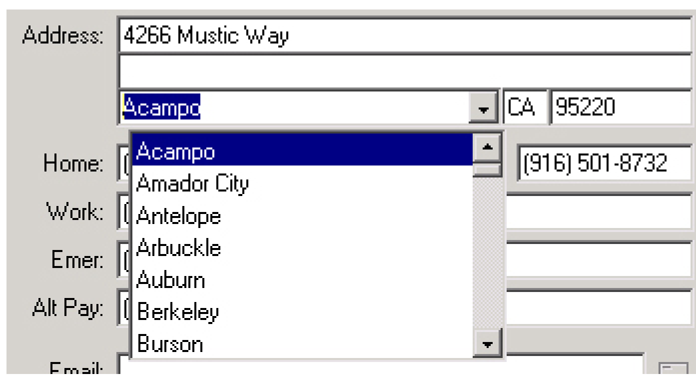
3. Click  (the "Add Record" button) to clear the entry fields for a new Family entry.

4. Enter the appropriate name, address and contact information in the various fields on the left side of the panel. The field lengths are: **First Names** (20), **Middle Initials** (1), **Last Names** (20), **Company:** (30), **Address #1** (30), **Address #2** (30), **City** (20), **State** (standard two letter abbreviation) and **Zip** (10, ZIP+4).

Note that the **City** field utilizes the City codes your set up earlier. If you enter the name of a city that ProSchool doesn't have saved in its cities database, and then click on another field to continue, the **Add New City** window opens:



You would then enter the state and zip codes in their respective fields and click **Yes** to save this city (and its related state and zip code) to ProSchool's cities database. After a city is added to the database (along with its state and zip code), you can access the database by clicking on the down-arrow at the right of the "city" field to open the city menu:



5. Enter the phone numbers as appropriate in the **Home:**, **Work:**, **Emer:** and **Alt Pay:** fields (standard 10-digit phone number for each). Note that the fifth (unnamed) phone number field is selectable by type (Cell, Fax, Pager or Work) and features a drop-down menu for selecting from among those four choices. In addition, notice the additional data entry fields immediately to the right of the **Work:**, **Emer:** and **Alt Pay:** phone fields. You can enter any relevant information in these fields, whether specific to the phone numbers or general contact info (these three data entry fields are benign and have no effect on any other data fields).

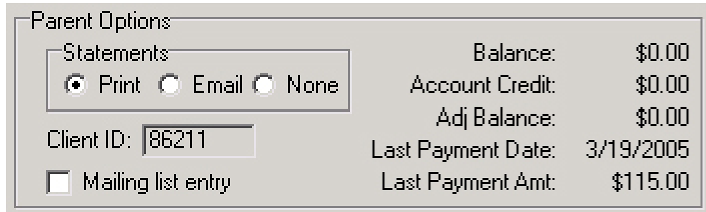
6. Enter the Family's e-mail address in the **Email:** field (40 character limit). As a convenience, you can e-mail the Family directly from this window by clicking  (the e-mail icon) to open a pre-addressed "compose e-mail" window via your computer's e-mail client (Outlook Express, Outlook, Eudora, Mozilla Thunderbird, etc.). This does not use ProSchool's built-in e-mail feature; it makes use of your existing e-mail client.

Note: ProSchool's built-in e-mail features are configured in the section entitled, "Configuring ProSchool To Your School" on page 38, and the email utility is described in detail in the section entitled "Using ProSchool's Email Utility" on page 290.

Building Your ProSchool Database

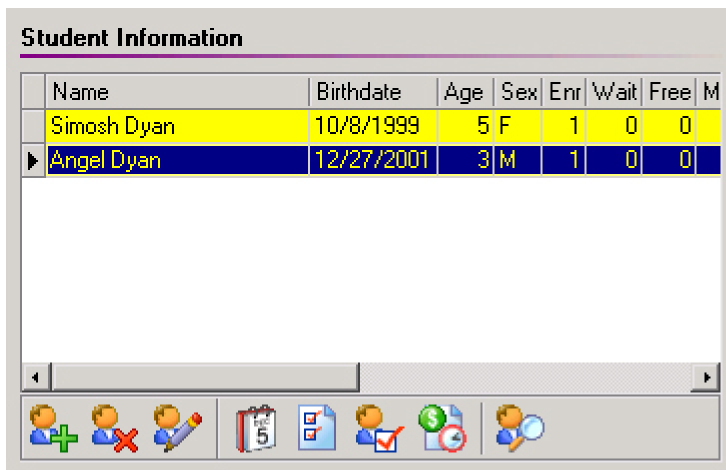
7. Enter a referral code (optional) via the drop-down menu in the **Referral:** field.

8. In the **Parent Options** section, you can select how the parents (or guardian) wish to receive their statements, and if they wish to be on your school's mailing list (just check as appropriate). In addition, this section displays, at a glance, this Family's Client ID number, and their account standing with your school:

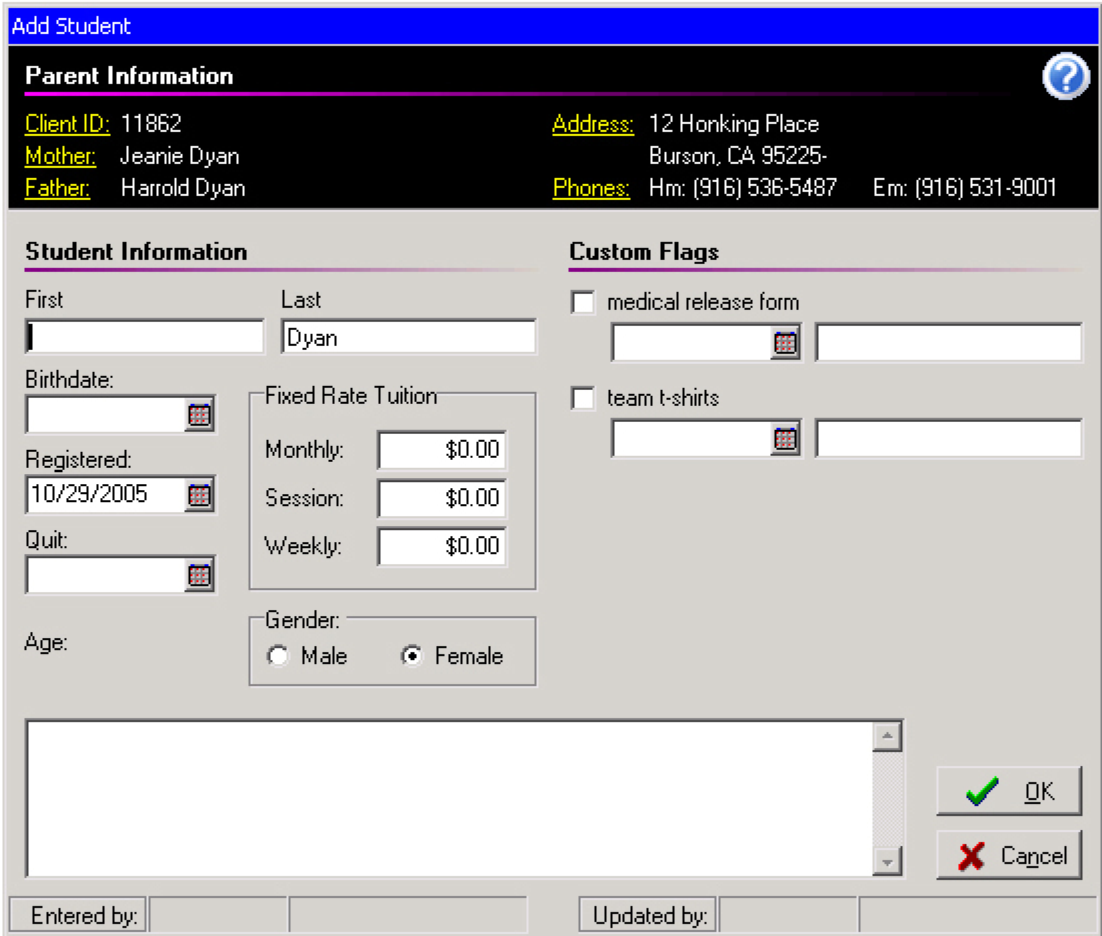


9. Remember to click  to save your entry when you are done entering or editing Family information.

10a. Students are added through the **Student Information** section in the upper right-hand area of the **Family Information** window:



10b. To **add a new Student**, click  to open the **Add Student** window:



Note that the Parent (Client) information appears in the top section of the window.

10c. Enter the Student's name, birthdate, date registered and gender in the appropriate fields.

! If the Client is taking classes at your School, ProSchool treats them as a Student—*they must be entered as such* (name, birthdate, etc.) in the Student Information window just as any other Student would be. You must also enroll this "Client" Student in classes just as you would any other Student. You will have a Client and Student who are one in the same.

10d. If this Student is enrolling under a *fixed* tuition plan, enter the appropriate tuition rate information in the **Fixed Rate Tuition** section. (If you have not yet determined the rates to charge this Client, you can return to this screen at any time to change or update it.)

10e. If you wish to add information unique to this Student (medical condition, behavioral notes, etc.), enter that information in the **Comments** section. (As above, comments can be added or appended at any time.)

10f. Enter information, as appropriate, in the **Custom Flags** section (pertaining to the predefined flags you may have configured earlier). In the window, above, two flags have previously been configured: one for a medical release form and one for team t-shirts.

Building Your ProSchool Database

10g. After you have finished entering the Student's information, click 

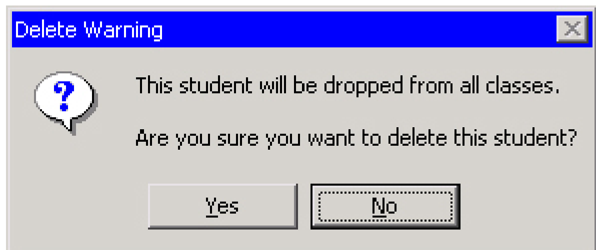
to close the **Add Student** window.

11. To **edit an existing Student** the process is very similar. From within the **Family Information** window, in the **Student Information** section, click  to open the **Edit Student** window (which is almost identical to the **Add Student** window). Enter your changes, then click 

to save the changes and close the **Edit Student** window (or click 

to disregard the changes and close the window).

12. To **delete a Student**, select them for deletion by clicking on their name, then click  to delete them from this Family record. A confirmation dialogue box will appear:

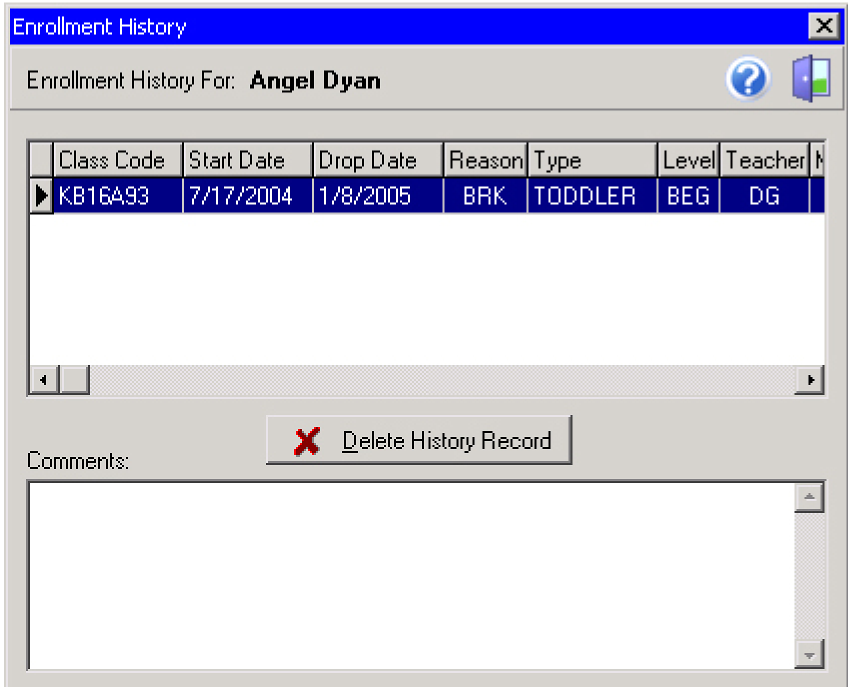


Click **Yes** to delete the Student from this Family record (and all classes the Student is currently enrolled in) or **No** to abort the deletion process for this Student.

13a. You can also easily view additional data about a selected Student by utilizing the functions represented by the following buttons:

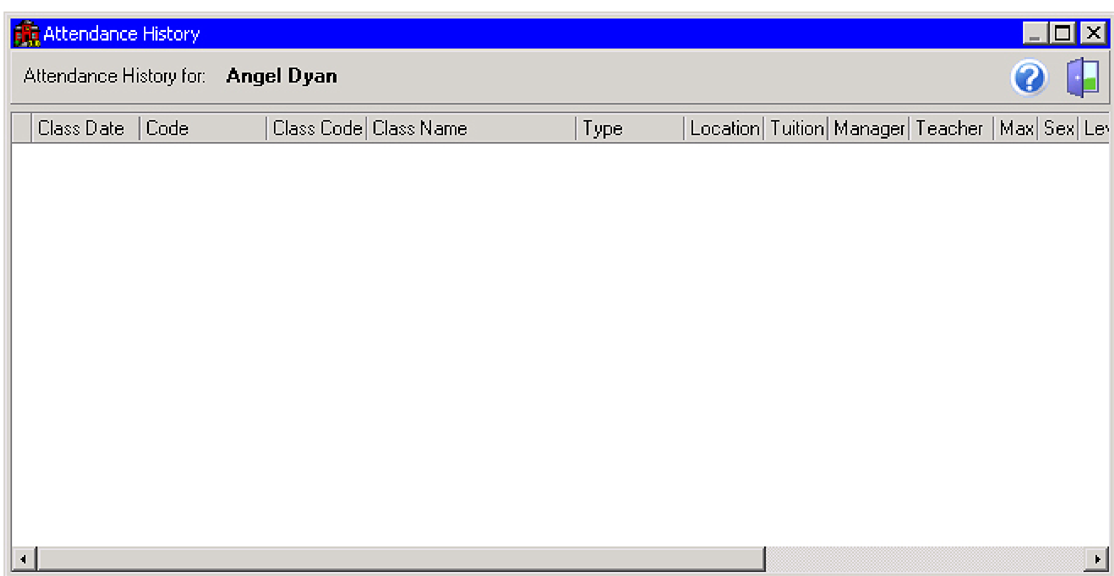
These buttons appear along the bottom edge of the **Student Information** panel. To use them, first select the Student's name in the **Student Information** panel, then proceed as follows:

13b. To view a Student's enrollment history, click to open the **Enrollment History** window:



ProSchool gives you the ability to delete a specific history record. To do so, select the history record you want to delete by clicking on it, then click **Delete History Record** to delete it. A confirmation dialog window will open; click **Yes** to proceed, or **No** abort the deletion. To close the window, click either the **X** or in the upper right-hand corner.

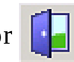
13c. To view a Student's attendance history, click to open the **Attendance History** window:



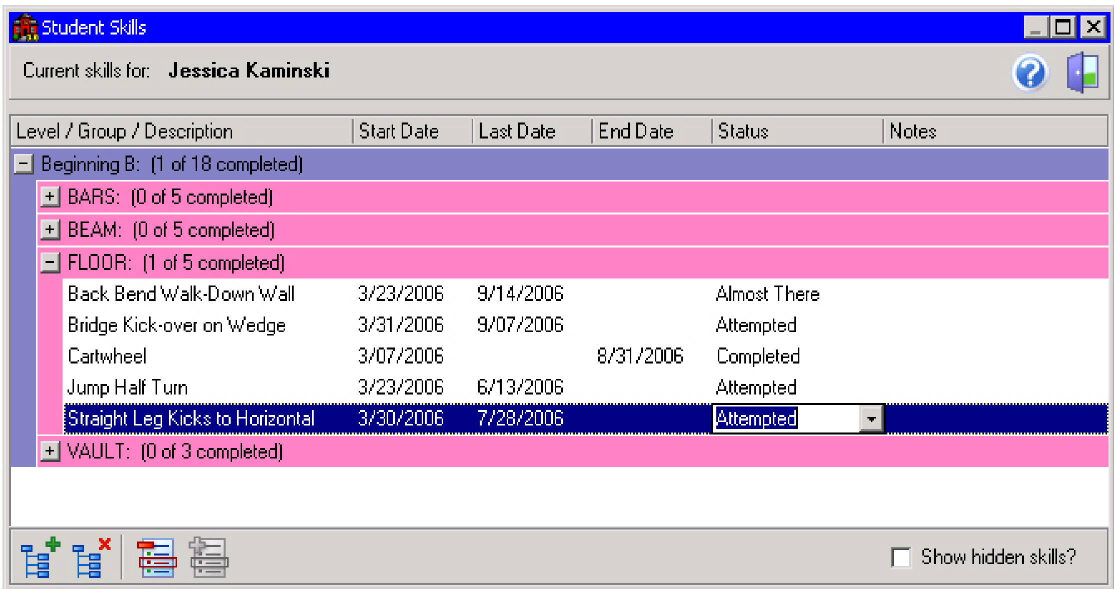
Building Your ProSchool Database

The **Attendance History** window (shown at the bottom of the prevous page) displays a wealth of information (on some computer monitors, you will need to scroll rightward to view it all): Class Date, Code, Class Code, Class Name, Type, Location, Tuition, Manager, Teacher, Max (maximum students), Sex (female, male or co-ed), Level, Days, Start Time, Duration, Min Age and Max Age (the age range of Students in the class).

Note that the data presented in this window is informational only; no actions are available.

13d. To close the window, click the **X** or  in the upper right-hand corner.

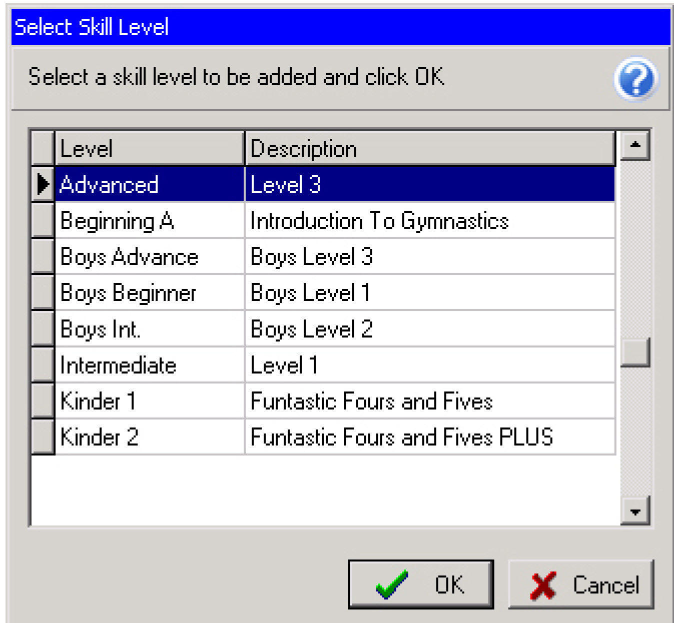
14a. To add, edit or view a Student's skills, select their name by clicking on it, then click  to open the **Student Skills** window:



This window displays a Student's skill attributes: Level / Group / Description, Start Date, Last Date, End Date, Status and Notes. As you would expect, data in this window is largely dependent on the Skills codes you defined earlier on page 80 in the section entitled, "Setting Up Basic Codes".

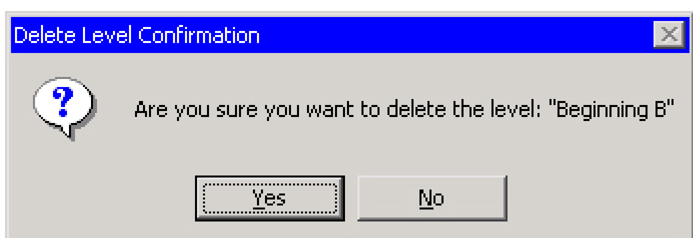
Building Your ProSchool Database

14b. To add a skill level (i.e. “beginner”, “intermediate”, “advanced” or whatever skill codes you previously defined), click to open the **Select Skill Level** window:



14c. Select the skill level you want to add for this Student, and click OK to do so.

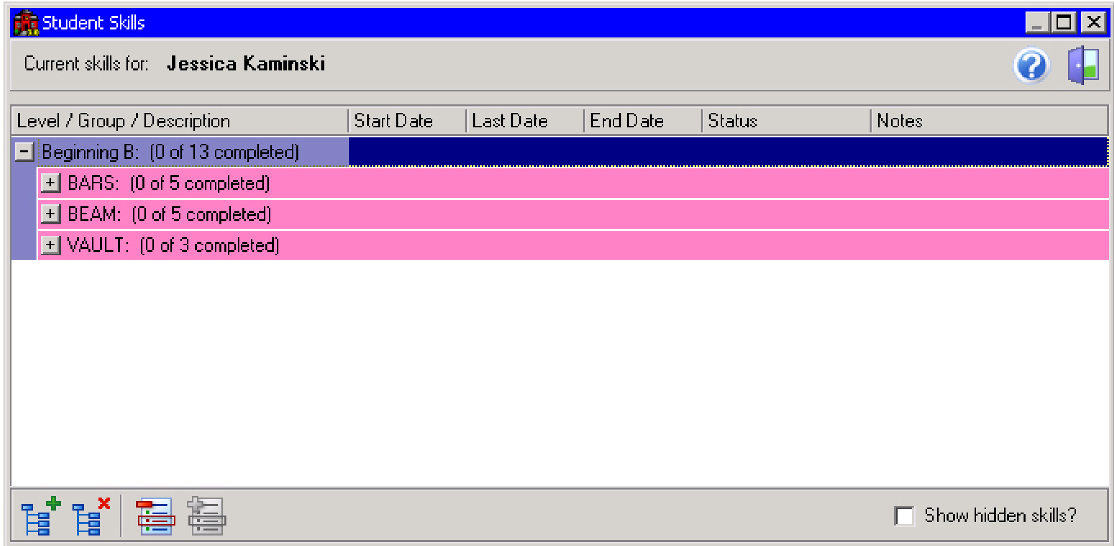
14d. To delete a skill level for this Student, select it, then click to do so. A confirmation will appear:



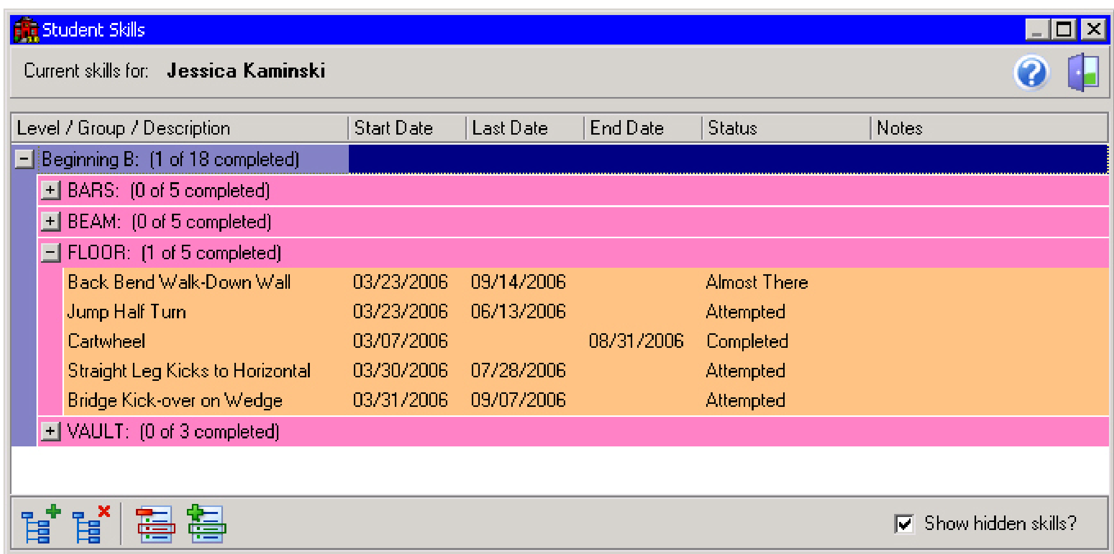
Click Yes to delete the level.

Building Your ProSchool Database

14e. To hide a specific skill, click  and that skill will not be shown in the **Student Skills** window (though the other skills will remain visible):



14f. To show the hidden skills *only while this window is currently open*, click the **Show hidden skills?** check box. The hidden skills will appear against an orange background, to signify that they are still classified as "hidden" by ProSchool:

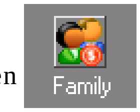


14g. To close the window, click the **X** or  in the upper right-hand corner.

MODIFYING EXISTING FAMILIES IN YOUR PROSCHOOL DATABASE

Modifying Family records is also accomplished in the **Family Information** window. ProSchool's Family search tool makes it easy to find existing Families based on any of the data fields that appear in the **Family Information** window.

To modify Family records:

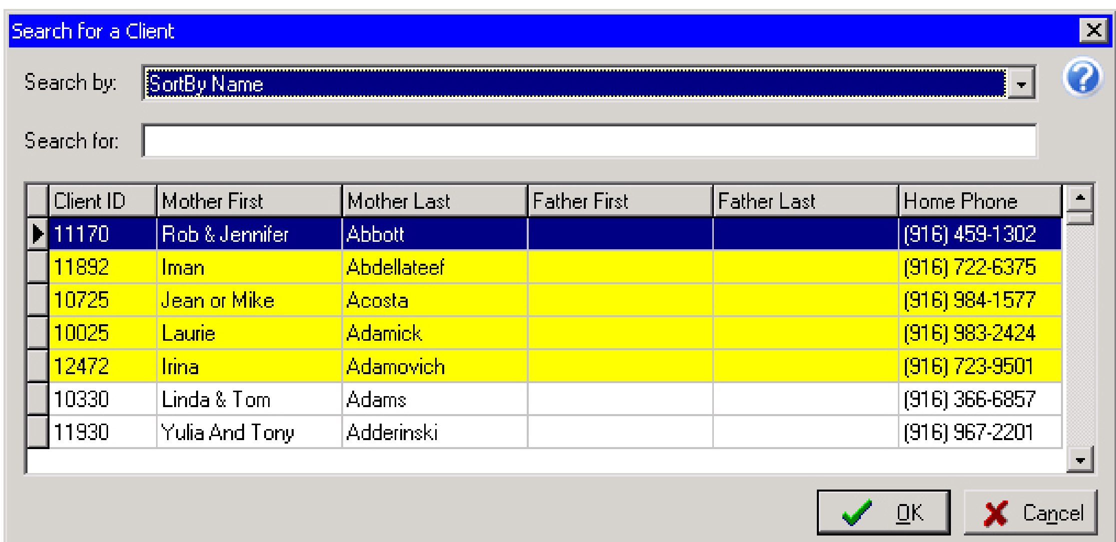
1. If you are not currently in the **Family Information** window, click **Tasks**, then 

to open the **Family Information** window (shown in the previous section a few pages back).

2. ProSchool offers you two ways to search for the Family you want to modify, represented by the "search and find" panel at the top left of the **Family Information** window:

Here are your options, and how they work:

SEARCH OPTION ❶ Click  (magnifying glass) to open the *context-sensitive* **Search for a Client** window:



Client ID	Mother First	Mother Last	Father First	Father Last	Home Phone
11170	Rob & Jennifer	Abbott			(916) 459-1302
11892	Iman	Abdellateef			(916) 722-6375
10725	Jean or Mike	Acosta			(916) 984-1577
10025	Laurie	Adamick			(916) 983-2424
12472	Irina	Adamovich			(916) 723-9501
10330	Linda & Tom	Adams			(916) 366-6857
11930	Yulia And Tony	Adderinski			(916) 967-2201

Enter your search criterion in the **Search by:** field and the Family's last name in the **Search for:** field (partial or full spelling). As you enter the characters of the name, the name listings in the pane immediately below will scroll in response to your input.

Hint: If you wish to change the order in which the columnar data is presented in the Search for a Family window, simply drag the column heading left or right accordingly.

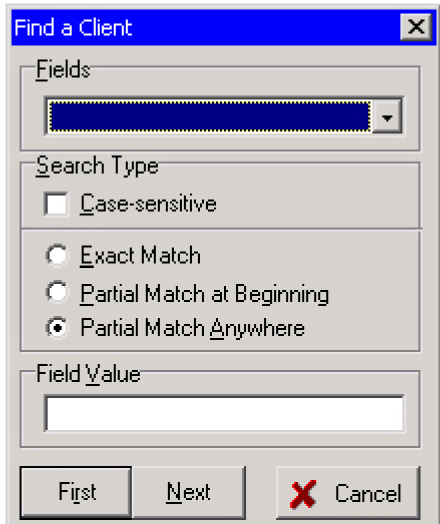
Select (click on) the Family you want, then click **OK** to close the **Search for a Family** window and return to the **Family Information** window. Your selected Family will populate the appropriate fields of the **Family Information** window, and the **Student Information** section will be populated with the Students in that Family that are enrolled in your school.

Building Your ProSchool Database

-continued-

The **Search for a Family** *window is discussed in greater detail in a following section—see "Using ProSchool's Context-sensitive Search Function / Conducting Client and Student Searches in ProSchool".*

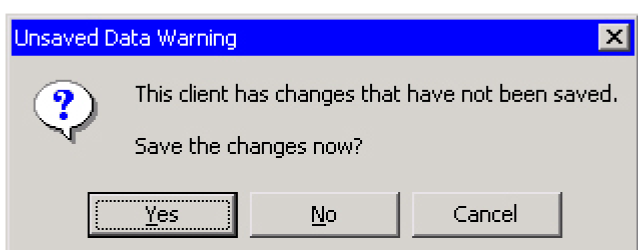
SEARCH OPTION ❷ Click  (binoculars) or **F2** on the keyboard to open the **Find a Client** window:



In the **Fields** section, enter or select the search criterion you wish to use in your Family search. Indicate your preferences in the **Search Type** and **Field Value:** sections, then click **First** to initiate the search. ProSchool returns you to the **Family Information** window and highlights the first instance matching your search criteria in the **Parent Information** section of the **Family Information** window. To indicate the next name meeting your search criteria, click  (or **F3** on the keyboard). ProSchool will let you know when it exhausts all the possibilities based on your search criteria.

The **Find a Client** *window is discussed in greater detail in a following section—see "Using ProSchool's Context-sensitive Search Function / Searching for Families Using the 'Find A Family' Function".*

3. Make the appropriate changes to the Client's data. When you are done, click  to save your entry. If you try to access another Family, ProSchool automatically saves the changes you've just entered. However, if you try to access another section of ProSchool (such as accessing the **Tasks** menu) the **Confirm** dialog box will appear asking you if you want to save your changes:



Click **Yes or No**, as appropriate—or click **Cancel** to return to the **Family Information** window and enter other changes.

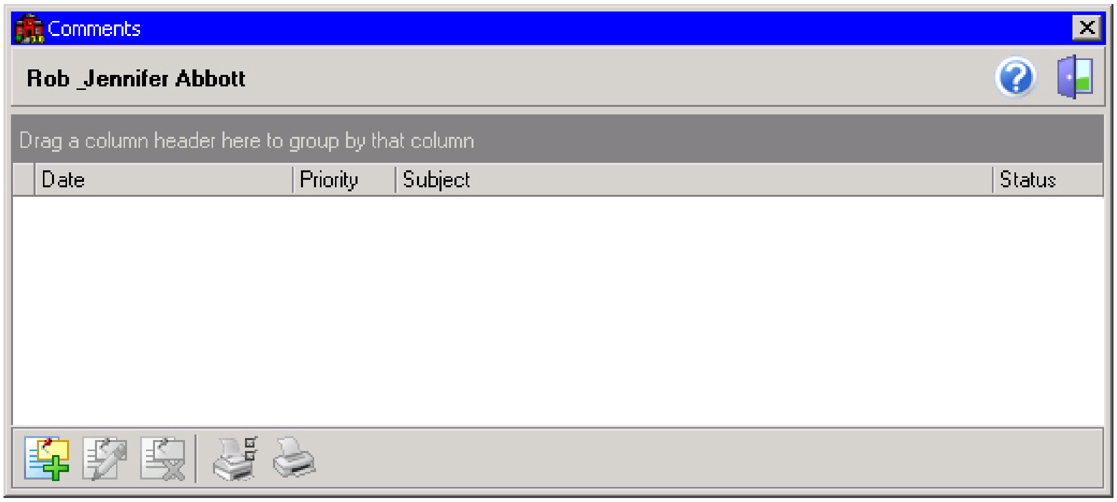
USING PROSCHOOL'S CLIENT COMMENTS UTILITY

ProSchool's Comments utility enables you to add anything from simple notes to complex memoranda to Client records. If you want to create detailed comments containing various text attributes (bold, italics, underline, colored text) and you appreciate the tools included in a good word processor —such as formatting, "find" commands or bullets—you will be right at home because ProSchool's comment utility *is* a word processor at heart.

On the other hand, if you just want to insert a quick note in a Client record you can easily do that in the **Edit comment** screen without even opening the word processor window. This frees you from unneeded complexity and makes your time on the computer more efficient.

To enter a Client comment:

1. From the **Family Information** window, first navigate to the Client about whom you wish to enter a comment.. Then click  (along the top edge) to open the **Comments** window:



If this Client has no comments entered, the window will appear as above; only the "Add Comment" button (bottom left) will be available.

Building Your ProSchool Database

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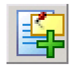
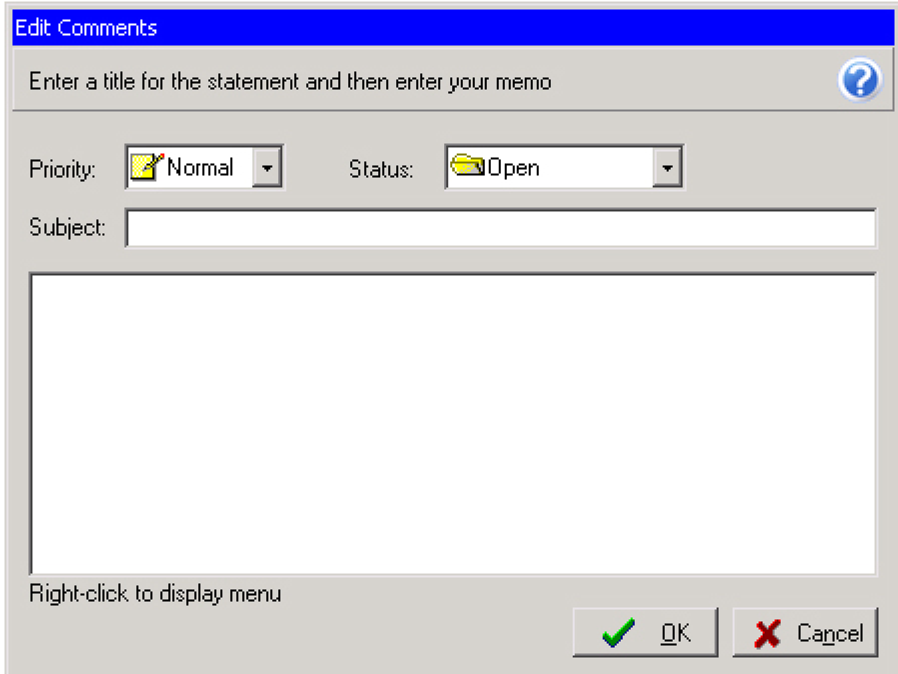
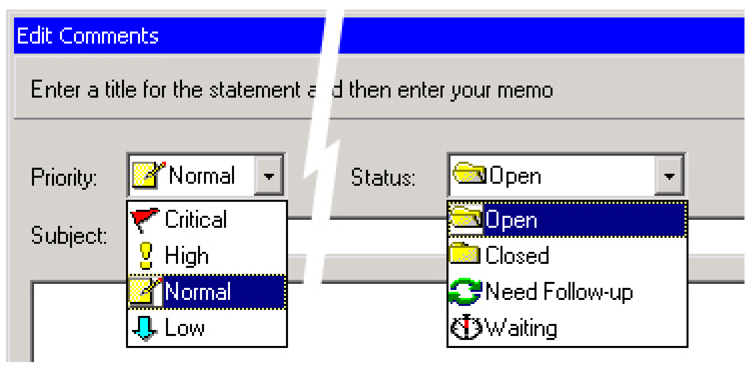
2. To enter a comment, click  to open the **Edit Comments** window:



3. Select a Priority (Critical, High, Normal or Low) and Status (Open, Closed, Need Follow-up or Waiting) for your note by clicking on your choice in the respective drop-down menus:



The **Priority:** options are designed to present you with a visual indicator of the importance of the note any time the **Comments** window is opened. Likewise, the **Status:** options provide an indicator as to whether the comment concerns an issue still "in progress" ("Open"), resolved and requiring no further attention ("Closed"), in need of further attention in the future ("Need Follow-up") or waiting on someone or something before resolution can occur ("Waiting").

Note that if you have one or more comments set as priority "critical", a large"!" will appear at the top of the Family Information screen for that Client to indicate that immediate attention is required:

To better understand how you might use the Priority and Status options in a progression of comments, consider the following scenario:

An issue has arisen with a returned check. A manager makes an entry, selecting “Normal” priority and indicating the need for follow up. In the second note, the priority changes to “High” due to the increased urgency of the situation; status remains unchanged. In the third comment the urgency has increased to “Critical” priority; status is still unchanged. In the fourth comment, contact is made with the Client, arrangements are made, so Priority remains “Critical” but the Status changes to “Waiting” pending the agreed-upon resolution.

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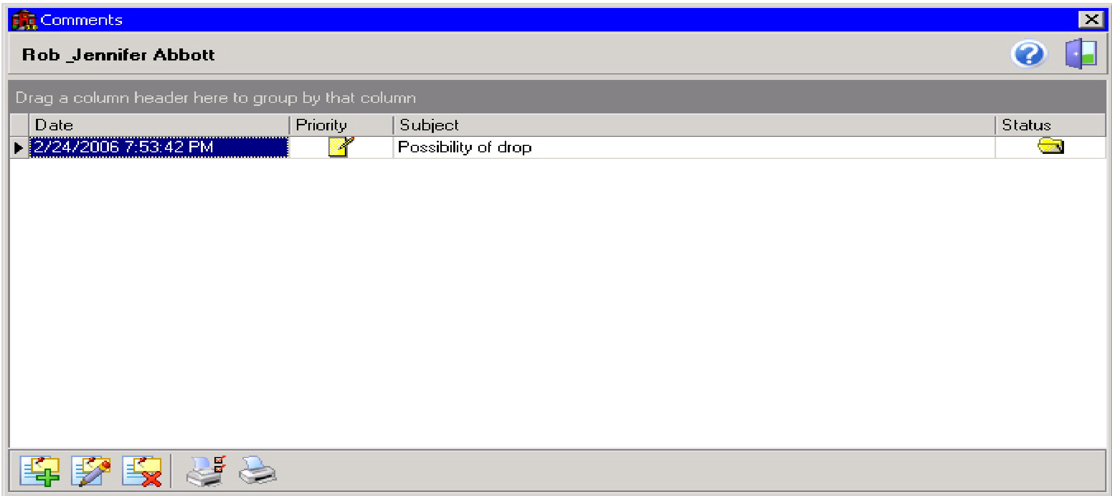
4. Click **OK** to save your comment, and close the **Edit Comment** window. The **Comments** window will now show the added comment:



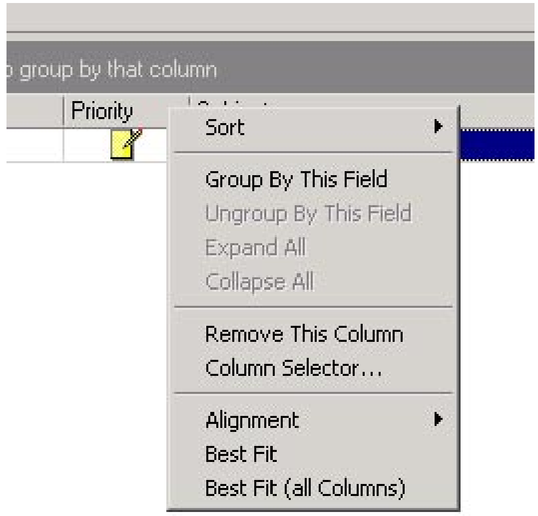
After a comment is added, the remaining buttons in the lower left-hand corner are now active. Here’s what they do:

- click  to **edit** the comment;
- click  to **delete** the comment;
- click  to print **selected** comments (in the case of multiple comments you can select only those you wish to print, such as a string of related comments);
- click  to print **all** comments.

Building Your ProSchool Database

-continued-

5. To adjust the widths of the four columns, remove or change the column alignment, right-click on the heading area of the column you want to modify, to open the column edit menu:



6. To rearrange the **Date**, **Priority**, **Subject** or **Status** columns, drag the column title to a new position; the other columns will rearrange automatically. To prioritize the order of the listed comments according to any of the four headings, click on that column's heading (click again to reverse the order).

Building Your ProSchool Database

-continued-

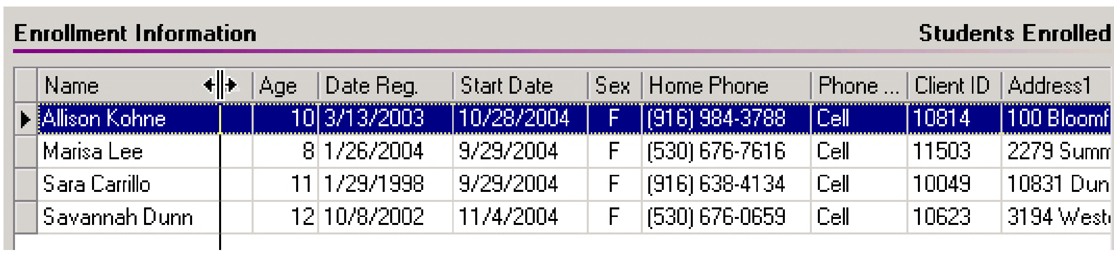
Customizing Table Layouts In ProSchool Screens

All ProSchool's screens which present data in tables—that is, in a columnar ("column and row") format—are customizable via a pop-up menu just one click away. This lets you configure the layout of the more data-rich windows in a way that visually works best for you. The choice of which columns are displayed, and in what order and width, and the order of the data in each column, is entirely up to you.

You can resize column widths, drag and drop column headers to change the horizontal sequence of the column layout, make specific modifications to the way the columns and rows are laid out, and sort the displayed data by any of several criteria. (These modifications will be discussed below in that order.)

To resize a column or change the column sequence:

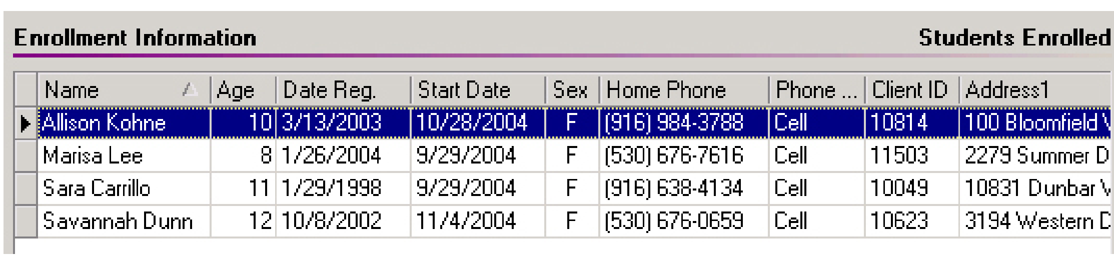
1. Click on the border line between two columns and drag it in the direction you wish to resize:



Enrollment Information — **Students Enrolled**

Name	Age	Date Reg.	Start Date	Sex	Home Phone	Phone ...	Client ID	Address1
Allison Kohne	10	3/13/2003	10/28/2004	F	(916) 984-3788	Cell	10814	100 Bloomf
Marisa Lee	8	1/26/2004	9/29/2004	F	(530) 676-7616	Cell	11503	2279 Summ
Sara Carrillo	11	1/29/1998	9/29/2004	F	(916) 638-4134	Cell	10049	10831 Dun
Savannah Dunn	12	10/8/2002	11/4/2004	F	(530) 676-0659	Cell	10623	3194 West

In the example above, we dragged the right border of the **Name** column to the left to narrow it (dragging to the right would widen it). The result gave us more room in the window (which will be useful if we want to widen other columns, or make room for an additional column to be displayed):



Enrollment Information — **Students Enrolled**

Name	Age	Date Reg.	Start Date	Sex	Home Phone	Phone ...	Client ID	Address1
Allison Kohne	10	3/13/2003	10/28/2004	F	(916) 984-3788	Cell	10814	100 Bloomfield V
Marisa Lee	8	1/26/2004	9/29/2004	F	(530) 676-7616	Cell	11503	2279 Summer D
Sara Carrillo	11	1/29/1998	9/29/2004	F	(916) 638-4134	Cell	10049	10831 Dunbar V
Savannah Dunn	12	10/8/2002	11/4/2004	F	(530) 676-0659	Cell	10623	3194 Western D

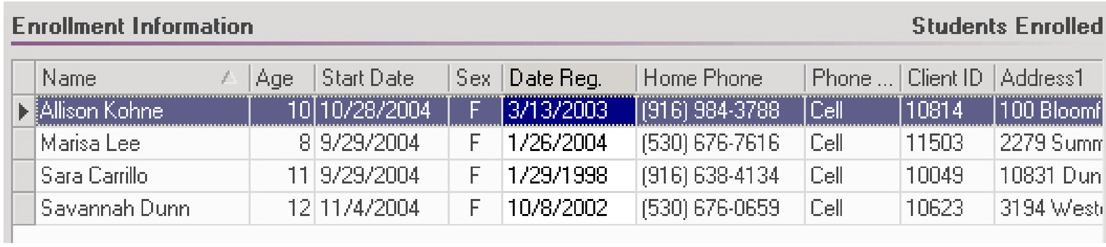
Hint: Note that you always drag the right border of the column you wish to resize—not the left.

This feature is useful in situations where you have your monitor set to a lesser resolution (i.e., 800 X 600), and don't want to resize your monitor to a higher resolution (i.e. 1,024 X 768). You can resize each column to eliminate excess width, thus "compacting" them to display as many columns as possible.

Building Your ProSchool Database

-continued-

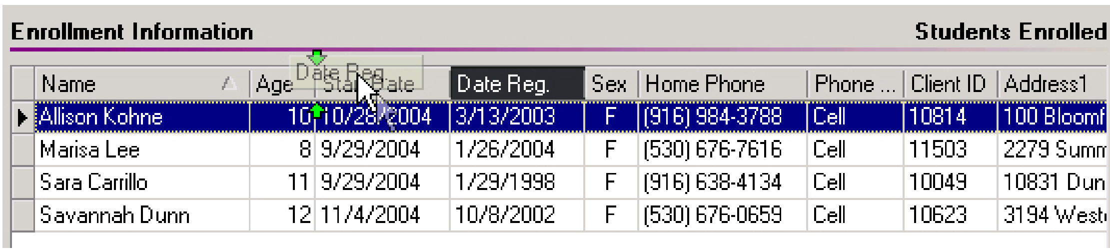
2. The second way ProSchool allows you to customize your columnar layouts is by actually changing the column order. For example, let's say you don't like the "Date Reg." column located between the "Sex" and "Home Phone" columns...



Enrollment Information — Students Enrolled

Name	Age	Start Date	Sex	Date Reg.	Home Phone	Phone ...	Client ID	Address1
Allison Kohne	10	10/28/2004	F	3/13/2003	(916) 984-3788	Cell	10814	100 Bloomf
Marisa Lee	8	9/29/2004	F	1/26/2004	(530) 676-7616	Cell	11503	2279 Summ
Sara Carrillo	11	9/29/2004	F	1/29/1998	(916) 638-4134	Cell	10049	10831 Dun
Savannah Dunn	12	11/4/2004	F	10/8/2002	(530) 676-0659	Cell	10623	3194 West

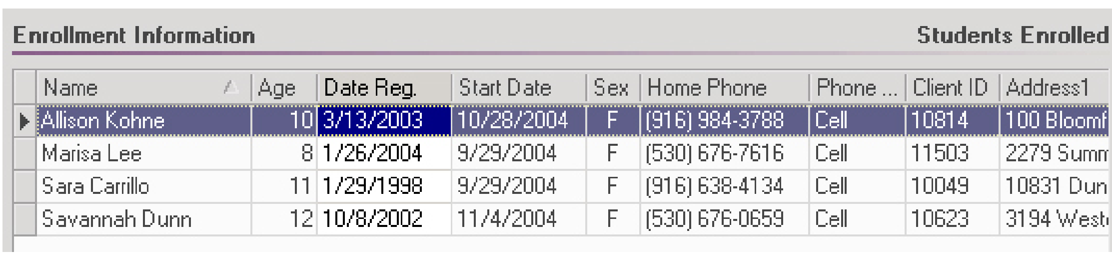
...and would like to move it to the left, and locate it between the "Age" and "Start Date" columns. Simply click on the column's heading and drag it to the left. The green arrows will guide you so you know exactly where you'll "land" the column:



Enrollment Information — Students Enrolled

Name	Age	Start Date	Date Reg.	Sex	Home Phone	Phone ...	Client ID	Address1
Allison Kohne	10	10/28/2004	3/13/2003	F	(916) 984-3788	Cell	10814	100 Bloomf
Marisa Lee	8	9/29/2004	1/26/2004	F	(530) 676-7616	Cell	11503	2279 Summ
Sara Carrillo	11	9/29/2004	1/29/1998	F	(916) 638-4134	Cell	10049	10831 Dun
Savannah Dunn	12	11/4/2004	10/8/2002	F	(530) 676-0659	Cell	10623	3194 West

Release your mouse button when the arrows indicate your column's destination. It falls into place, and the position of the other columns are adjusted automatically to accommodate your relocated column:



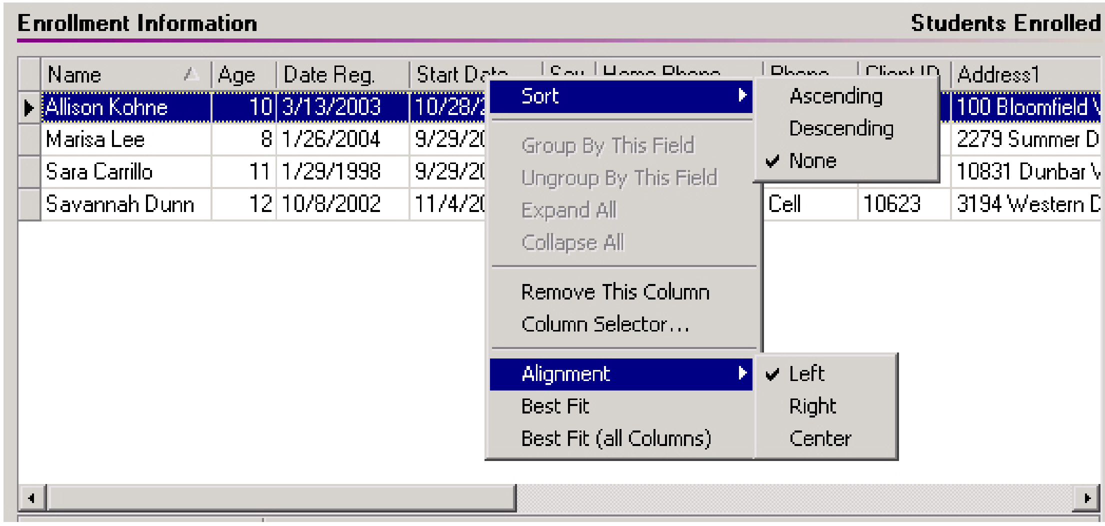
Enrollment Information — Students Enrolled

Name	Age	Date Reg.	Start Date	Sex	Home Phone	Phone ...	Client ID	Address1
Allison Kohne	10	3/13/2003	10/28/2004	F	(916) 984-3788	Cell	10814	100 Bloomf
Marisa Lee	8	1/26/2004	9/29/2004	F	(530) 676-7616	Cell	11503	2279 Summ
Sara Carrillo	11	1/29/1998	9/29/2004	F	(916) 638-4134	Cell	10049	10831 Dun
Savannah Dunn	12	10/8/2002	11/4/2004	F	(530) 676-0659	Cell	10623	3194 West

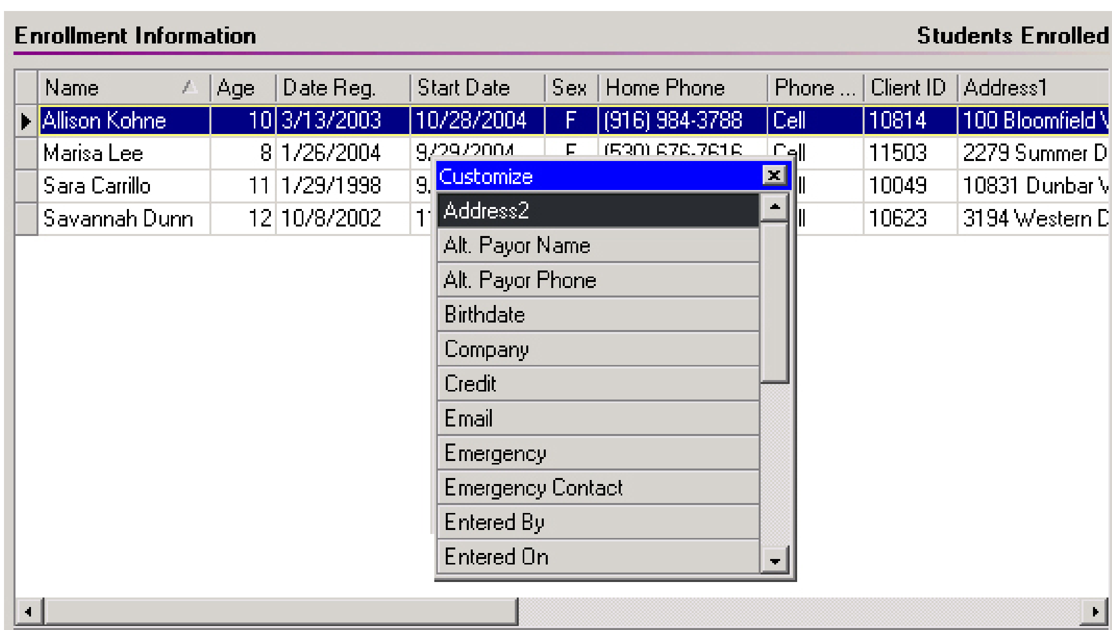
This allows you to order your columns so that the ones you refer to most often are the ones that always show.

To modify the various elements of a table:

1. Right-click on the column header of the column you wish to modify. A pop-up menu offers you several options:



- Sort – sorts all the names in the window *according to the sort order of the column you originally right-clicked on* (for example, if you right clicked on the **Age** column heading then selected Sort / Ascending, all names would be sorted with the youngest first (at the top) and the oldest last (at the bottom).
- Remove This Column – the column you right-clicked on to bring up this menu is the column that will be removed from the table.
- Column Selector – opens the **Customize** window, which allows you to choose the columns you want to appear:



Building Your ProSchool Database

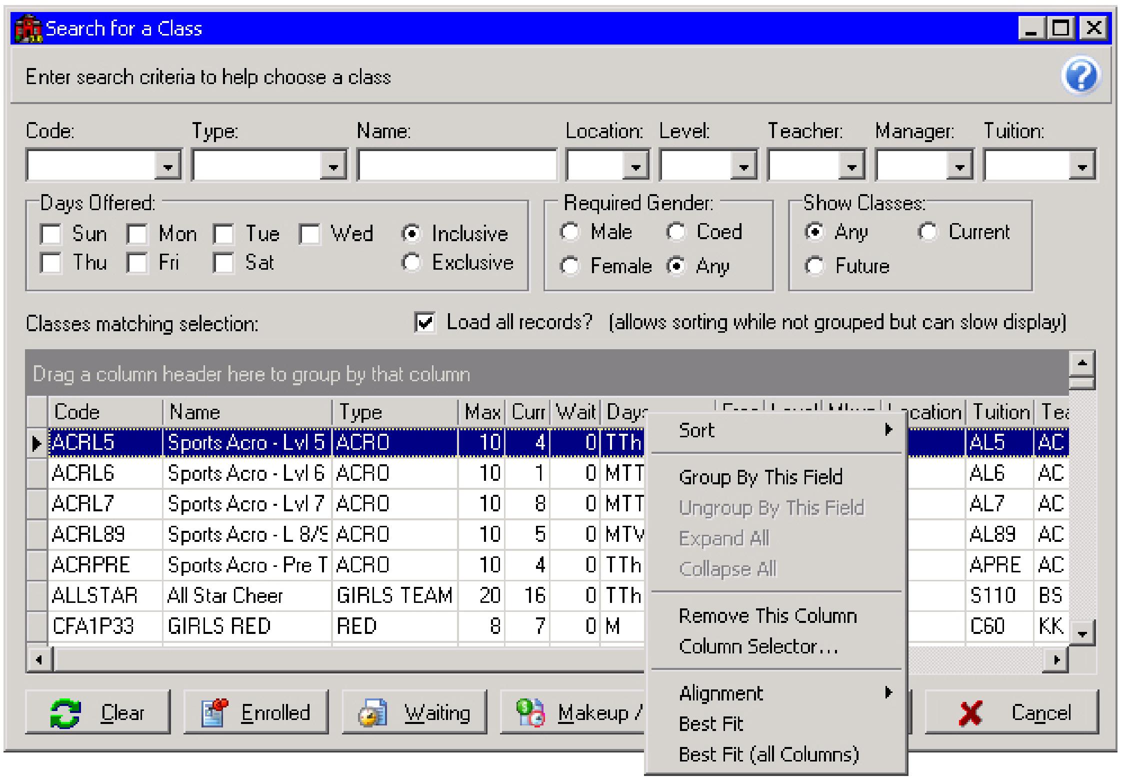
-continued-

This menu lists all of the possible columns that can be displayed in this window. To choose a column for display in this window, drag it into the column header area and place it in the column header where you want it to display (you can use the green arrows as a guide):

- Alignment [left/right/center] – aligns the data within the column based on your choice;
- Best Fit – ProSchool automatically determines the optimum width for the selected column (based on the type of data it contains) and adjusts the column's width accordingly;
- Best Fit (all Columns) – similar to "Best Fit" option above, except that ProSchool applies the optimum column width adjustment to *all* columns (based on the data each contains).

In addition to the above choices, there are four other choices that are inactive (grayed out): Group By This Field, Ungroup By This Field, Expand All and Collapse All. These options are inactive because they are not active in windows without a "grouping" bar above the table, such as the **Students Enrolled** window shown earlier in this section.

Conversely, windows containing a dark gray grouping bar, such as the **Search for a Class** window, use these four functions:



Building Your ProSchool Database

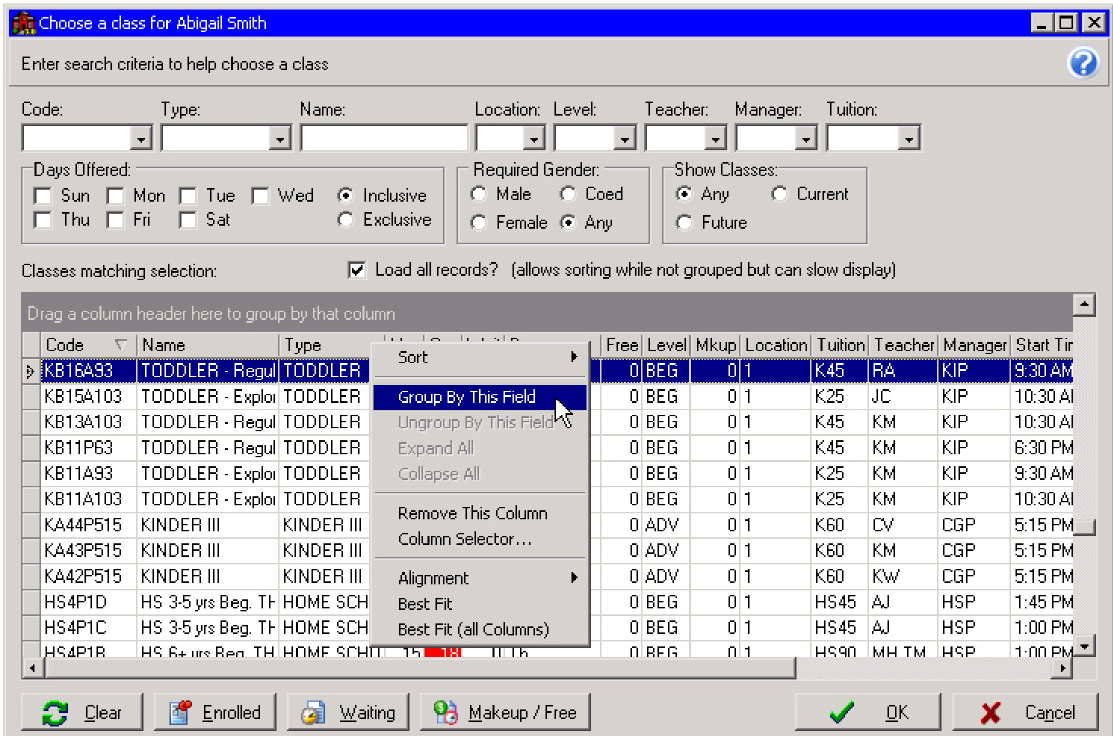
-continued-

To group data by a specific column heading:

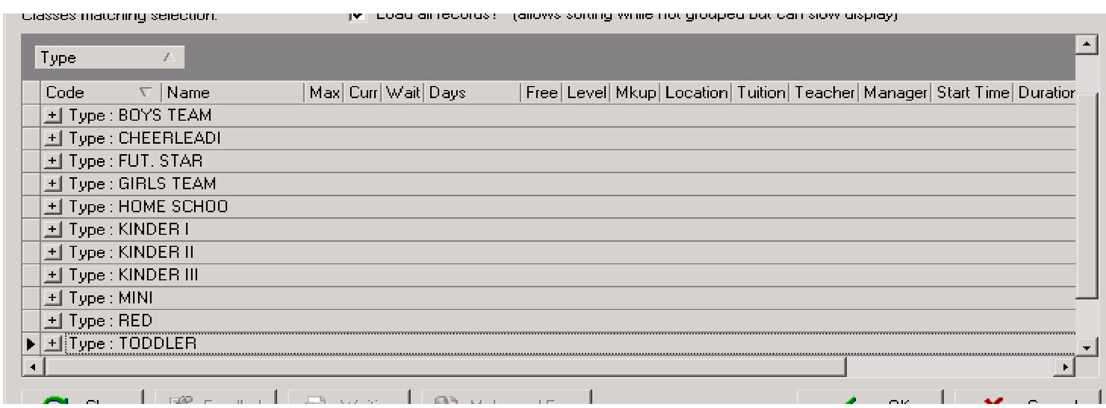
1. Drag the column header you want to use as the primary field for the grouping configuration and drop it on the dark gray grouping bar.

OR...

Right click on the column header you want to use as the primary field for the grouping configuration and select Group By This Field. For example, to reconfigure the table so that all data is grouped by class *type*, you would right-click on the Type column header:



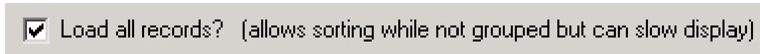
The table is reconfigured accordingly and displays only the class types:



Building Your ProSchool Database

-continued-

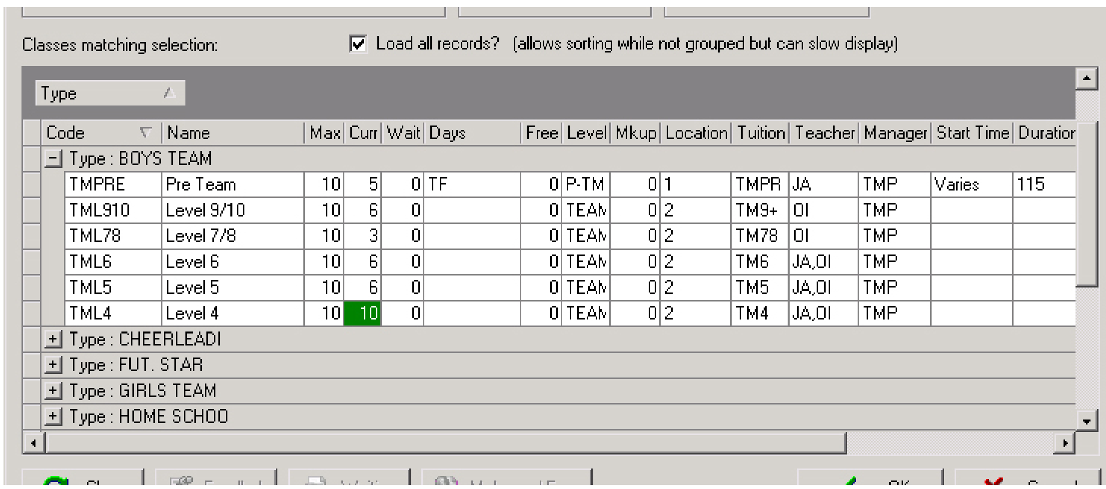
Hint: When sorting records, the power of ProSchool's database engine is fully realized with the Load all records? *option selected:*



However, if you have a large database, a slower computer or both, you may find ProSchool will run more quickly if the Load all records? *option is* <u>un</u>*selected (the default). We suggest experimenting with the setting to find which works best for you. Then, if no noticeable performance penalty is experienced, leave this option selected.*

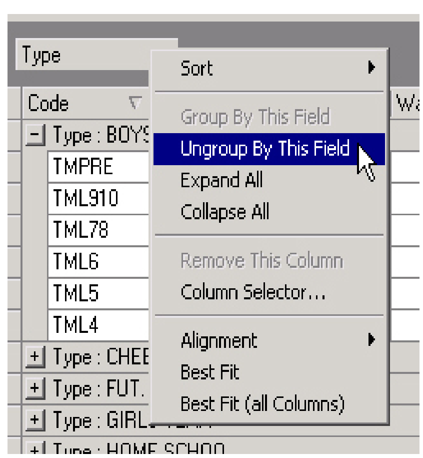
Note that the selected class type is preceded by ▶. In addition, the column heading ("Type") appears in its own box in the dark gray grouping bar. The △ button indicates the order of types is currently *ascending*; by clicking on it, the order of types is changed to *descending* and the button indicates this by changing to ▽. You can toggle back and forth at will to arrange the columnar data to suit your needs.

2. To view class details, click + immediately to the left of the class type to expand it.



To collapse the expanded line, click −.

3. To *ungroup* the fields by the column heading you selected, continuing with the above example, right-click on the Type box to open the pop-up column menu:



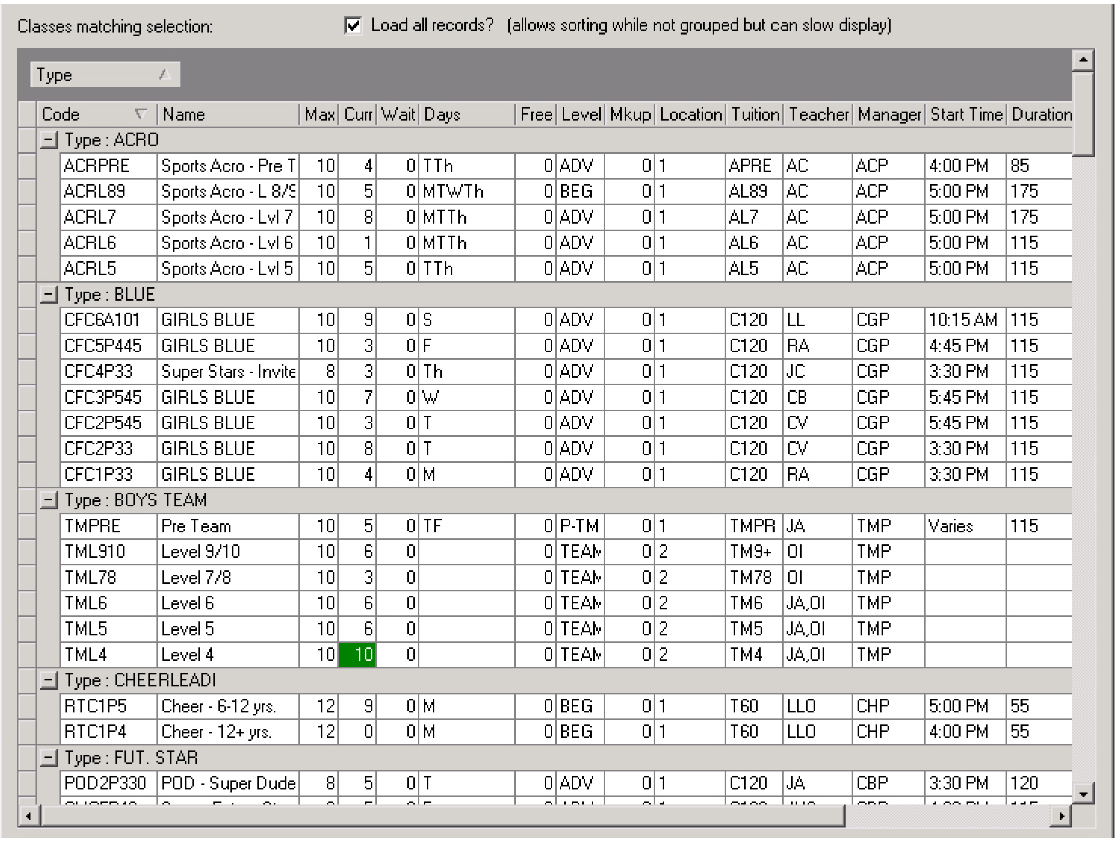
Building Your ProSchool Database

Click on **Ungroup By This Field** to undo the configuration you previously created using the **Group By This Field** option (which itself is grayed out while the configuration is active).

Note that when you first opened the pop-up menu to cancel the "class type" configuration, the **Ungroup By This Field**, **Expand All** and **Collapse All** options were available (as shown above).

4. To expand *all* class types in the listing, click on Expand All;

-continued-



Classes matching selection: ☑ Load all records? (allows sorting while not grouped but can slow display)

Type

Code	Name	Max	Curr	Wait	Days	Free	Level	Mkup	Location	Tuition	Teacher	Manager	Start Time	Duration
Type : ACRO														
ACRPRE	Sports Acro - Pre T	10	4	0	TTh	0	ADV	0	1	APRE	AC	ACP	4:00 PM	85
ACRL89	Sports Acro - L 8/9	10	5	0	MTWTh	0	BEG	0	1	AL89	AC	ACP	5:00 PM	175
ACRL7	Sports Acro - Lvl 7	10	8	0	MTTh	0	ADV	0	1	AL7	AC	ACP	5:00 PM	175
ACRL6	Sports Acro - Lvl 6	10	1	0	MTTh	0	ADV	0	1	AL6	AC	ACP	5:00 PM	115
ACRL5	Sports Acro - Lvl 5	10	5	0	TTh	0	ADV	0	1	AL5	AC	ACP	5:00 PM	115
Type : BLUE														
CFC6A101	GIRLS BLUE	10	9	0	S	0	ADV	0	1	C120	LL	CGP	10:15 AM	115
CFC5P445	GIRLS BLUE	10	3	0	F	0	ADV	0	1	C120	RA	CGP	4:45 PM	115
CFC4P33	Super Stars - Invite	8	3	0	Th	0	ADV	0	1	C120	JC	CGP	3:30 PM	115
CFC3P545	GIRLS BLUE	10	7	0	W	0	ADV	0	1	C120	CB	CGP	5:45 PM	115
CFC2P545	GIRLS BLUE	10	3	0	T	0	ADV	0	1	C120	CV	CGP	5:45 PM	115
CFC2P33	GIRLS BLUE	10	8	0	T	0	ADV	0	1	C120	CV	CGP	3:30 PM	115
CFC1P33	GIRLS BLUE	10	4	0	M	0	ADV	0	1	C120	RA	CGP	3:30 PM	115
Type : BOYS TEAM														
TMPRE	Pre Team	10	5	0	TF	0	P-TM	0	1	TMPR	JA	TMP	Varies	115
TML910	Level 9/10	10	6	0		0	TEAM	0	2	TM9+	OI	TMP		
TML78	Level 7/8	10	3	0		0	TEAM	0	2	TM78	OI	TMP		
TML6	Level 6	10	6	0		0	TEAM	0	2	TM6	JA,OI	TMP		
TML5	Level 5	10	6	0		0	TEAM	0	2	TM5	JA,OI	TMP		
TML4	Level 4	10	10	0		0	TEAM	0	2	TM4	JA,OI	TMP		
Type : CHEERLEADI														
RTC1P5	Cheer - 6-12 yrs.	12	9	0	M	0	BEG	0	1	T60	LLO	CHP	5:00 PM	55
RTC1P4	Cheer - 12+ yrs.	12	0	0	M	0	BEG	0	1	T60	LLO	CHP	4:00 PM	55
Type : FUT. STAR														
POD2P330	POD - Super Dude	8	5	0	T	0	ADV	0	1	C120	JA	CBP	3:30 PM	120

You can either scroll down to see all the listings, or resize the window downward (assuming your screen resolution allows this).

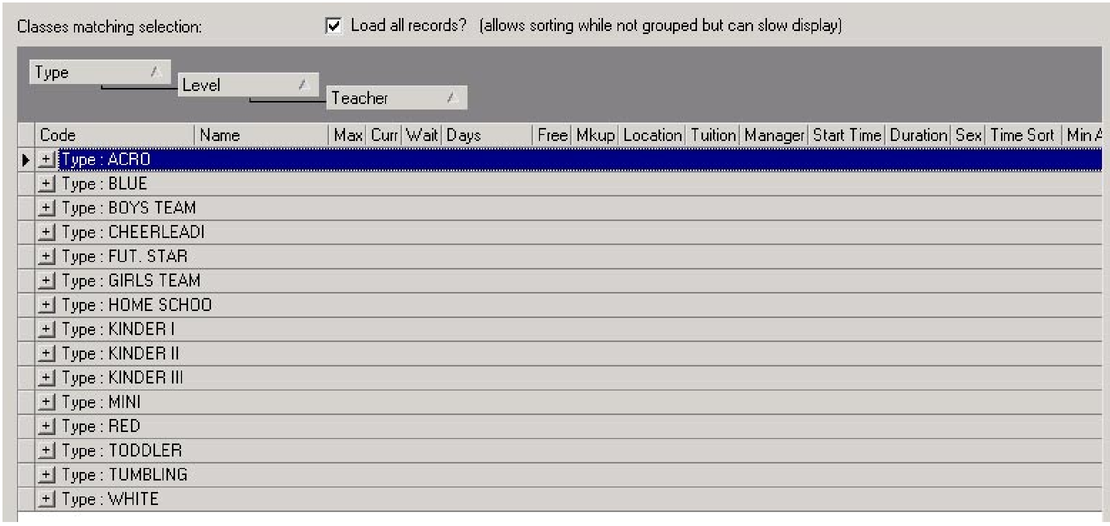
5. To *collapse* all the class types to their original state, click Collapse All. The window resumes the appearance it had right after you chose the Group By This Field option.

ProSchool allows you to use multiple column headings in a hierarchical fashion (similar to a computer's directory tree). For example, we will continue with the above example and group the classes by "type": *first*, by "level" *second* and by "teacher" as our *third* subgroup (all of which you should recognize as data fields in the **Class Information** screen).

Building Your ProSchool Database

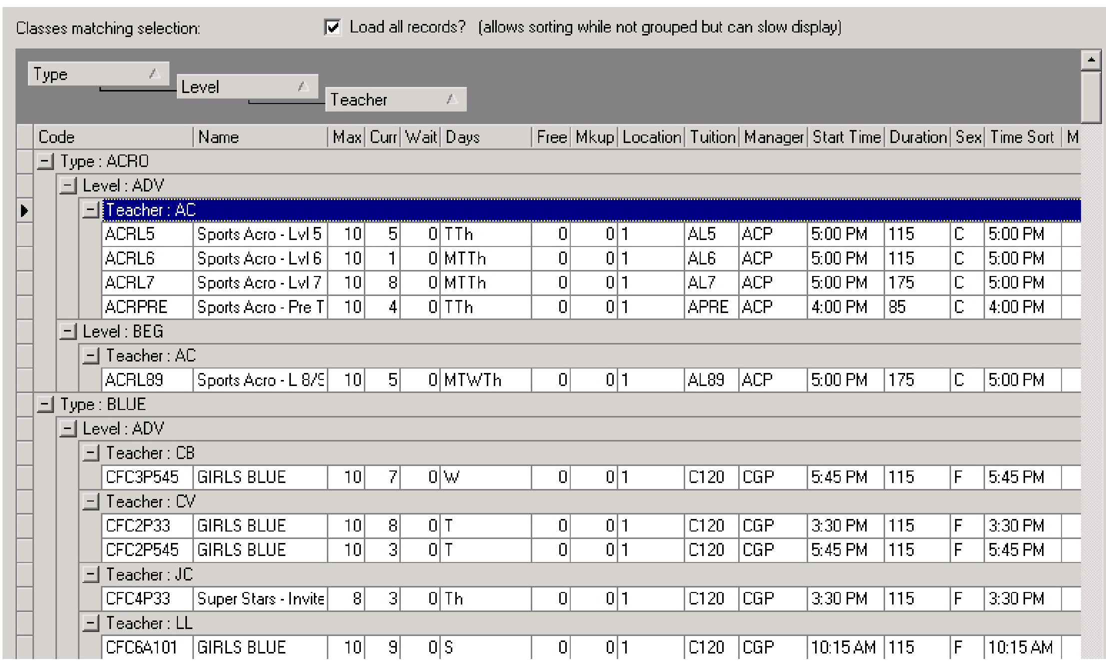
-continued-

Configured thusly, the table would appear like this:



Note the diagram at the top of the illustration; it gives you a visual representation of the way you have chosen to group, or "nest" your different column headings.

This is illustrated best by expanding all levels of our grouping scheme:



Remember, any window with a dark gray grouping bar can be configured as described above. In addition, note that ProSchool remembers your column modifications and sorting choices so that they are displayed this way in future sessions (you can change them at any time).

Hint: Don't be too concerned about these screen configuration details if you're new to ProSchool and find it overwhelming—just concentrate on the basics for now. Once you are familiar with the basic operation of ProSchool, you can take advantage of this feature set to streamline the Program's look and feel to suit your personal style.

Enrolling Students and Making Enrollment Changes

ENROLLING STUDENTS FROM THE "FAMILY INFORMATION" SCREEN

Now that you have configured classes and added Clients and Students, you are ready to enroll Students. Of course, if you have an existing school operation, this process effectively moves your existing Client, Student and class rolls into ProSchool.

In ProSchool, Students can be enrolled in classes in one of two ways:

- from the **Family Information** window;
- from the **Class Information** window.

This makes the program more convenient to operate; there is no difference in functionality between the two methods.


To enroll Students from within the Family Information window:

1. Click 

(the **Tasks** button on the left) to reveal the task menu buttons.

2. Click 

(the **Family** menu button) to open the **Family** panel.

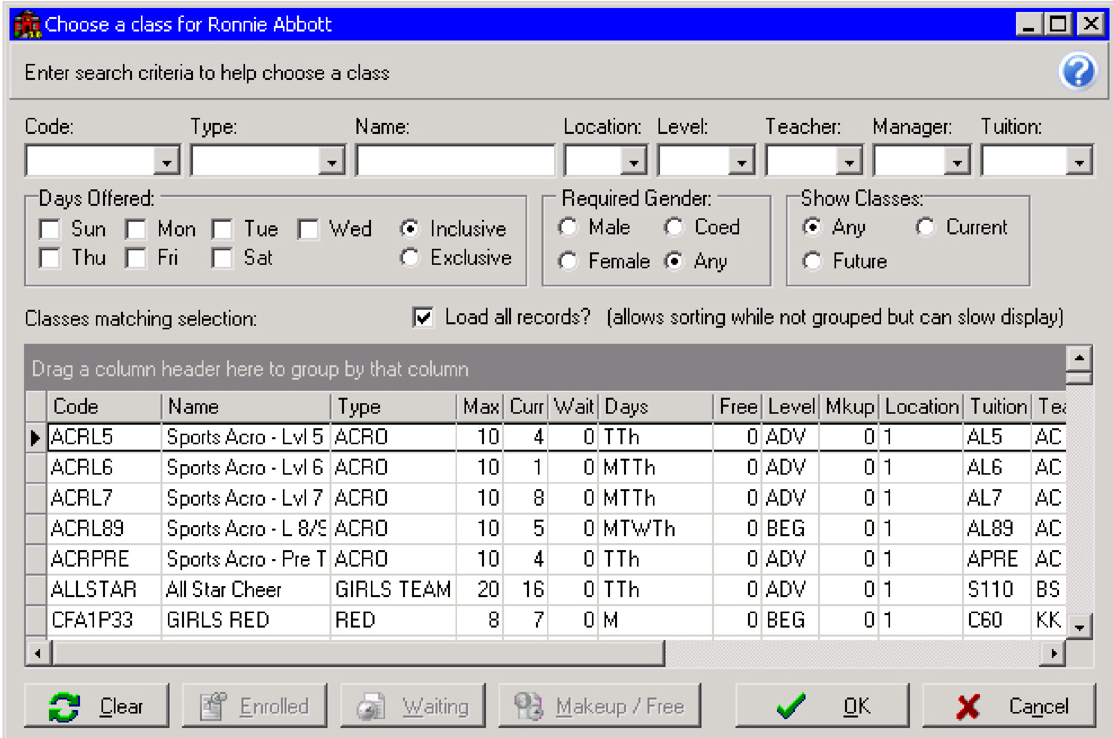
3. Select the Family for whom you wish to enroll Students, or click  to bring up the **Search for a Client** window.

4. Once your client is selected, select the Student's name from the **Student Information** section (upper right-hand corner of the window).

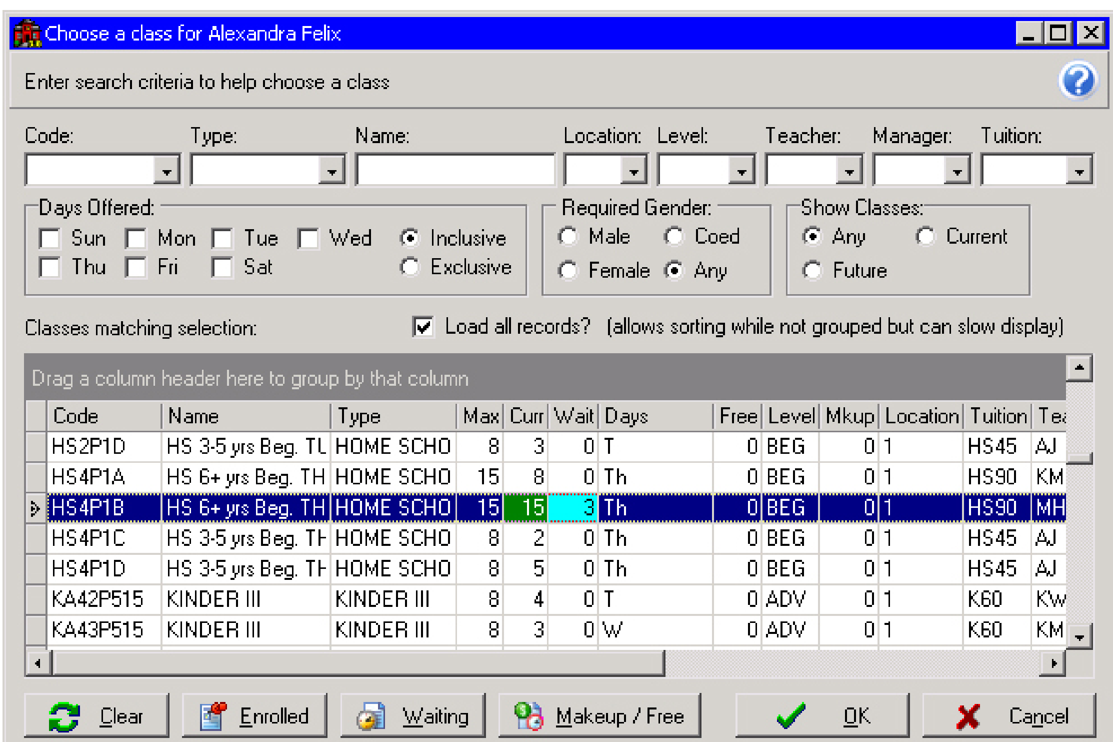
Enrolling Students and Making Enrollment Changes

-continued-

5. Move below to the **Enrollment Information** window, and click  to open the **Choose A Class For...** window:



Note that the initial view above shows several grayed-out (inactive) buttons across the bottom. However, select any class and the buttons become active:



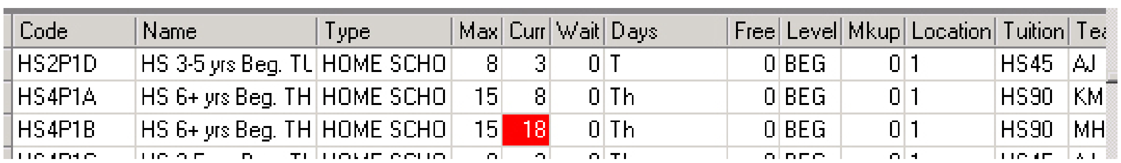
Enrolling Students and Making Enrollment Changes

-continued-

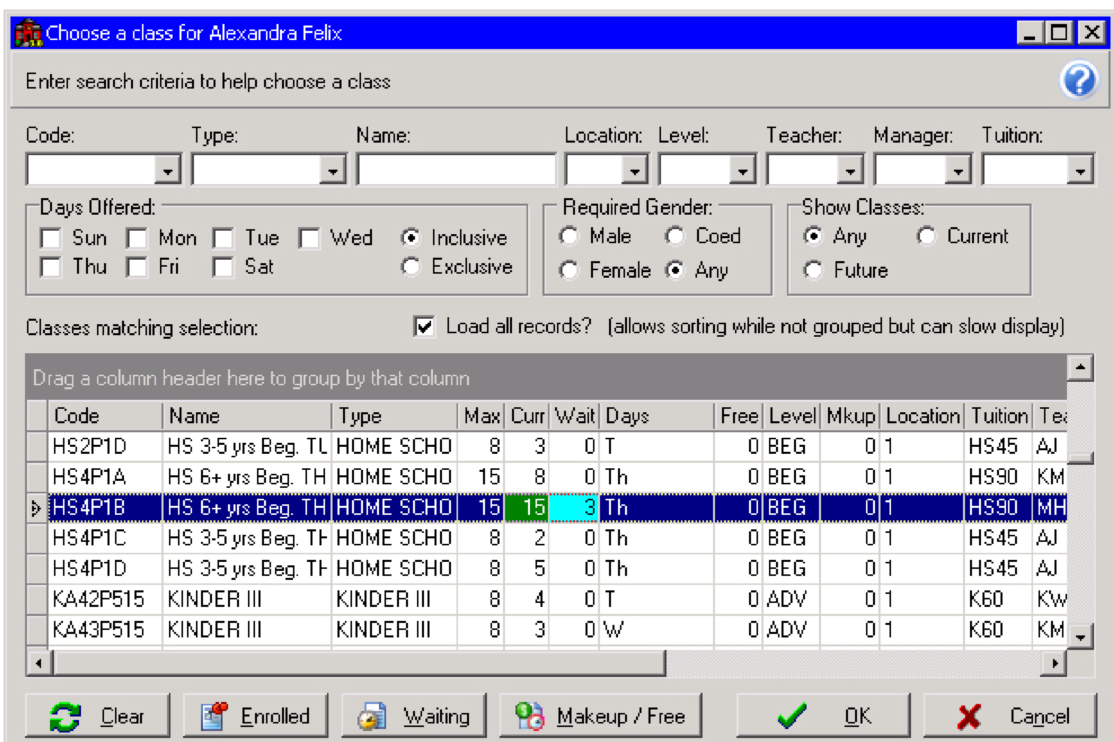
Note that the "Curr" (currently enrolled) column is marked in green. This is because this class is at maximum enrollment (as shown by a quantity of 15 in the "Max" column). This maximum quantity for a given class is determined by you when you configure a class as described on page 130 in the section entitled, "Defining Your Curriculum". Also, the "Wait" (waiting) column contains 3 students, indicating the possible need for another class to be added.

In some cases, you may choose to "over enroll" a class, that is, allow more Students than the maximum quantity you established when you originally configured the class in ProSchool. This can be for many reasons: You may have a different teacher for this class who can handle a higher number of Students in the same class... or you may have a situation where the number of sign-ups for this class exceeds the maximum by only one, in which case you decide to allow that Student to take that class as a "onetime" exception. ProSchool allows you this flexibility. The colored quantities are a quick and obvious indicator as to how many Students you're dealing with in these situations.

In the screen shot above, the maximum number of Students enrolled currently equals the maximum allowed for this particular class. If you decide to exceed the "maximum" number of Students by allowing the extra three to enroll in this class, for example, the display would look like this, with the "Curr" column's quantity highlighted in red:



Let's return to the **Choose A Class For...** window in which we had the maximum number of Students enrolled in class "HS4P1B" and three Students on the waiting list for this class:



Enrolling Students and Making Enrollment Changes

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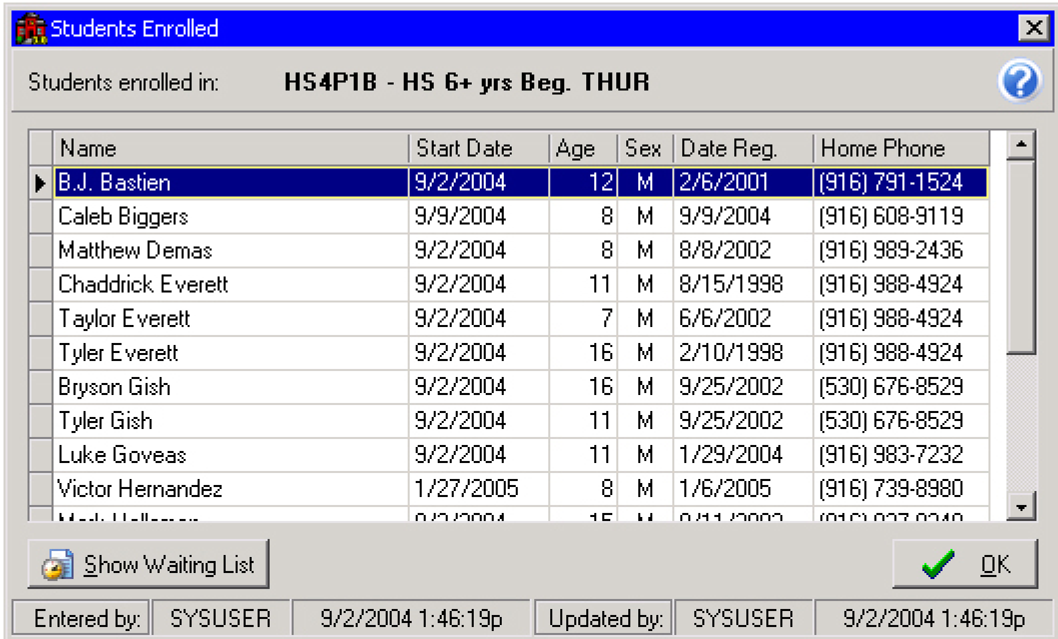
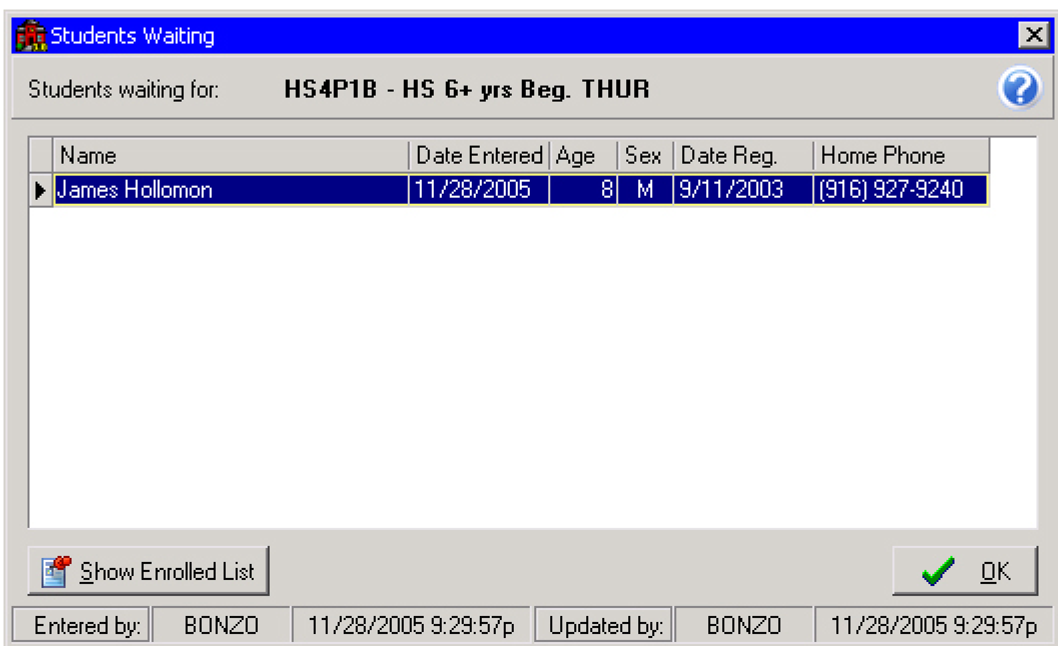
After selecting a class, click **Enrolled** to display all Students currently enrolled in it:



Conversely, click **Show Waiting List** to open the **Students Waiting** window (note that each window has a button that "points" to the other):



Both the **Students Enrolled** and **Students Waiting** windows are informational only—no actions can be initiated from them. Click **OK** to close the window.

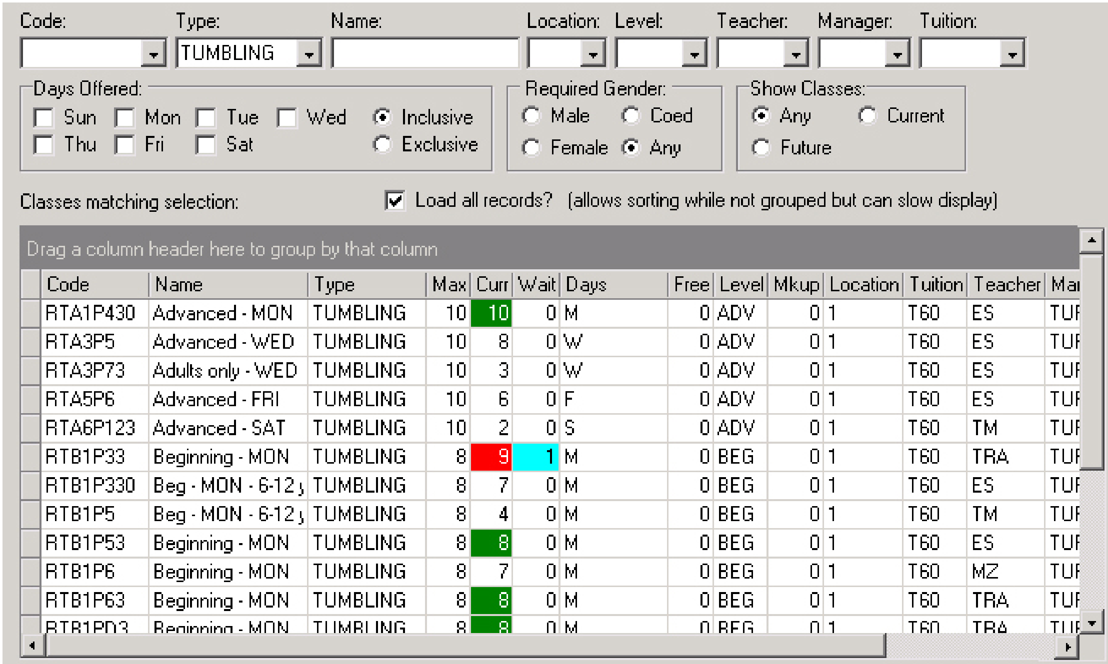
ProSchool offers useful search tools in the **Choose a class for...** window. Class searches are based on any or all of several criteria: class code, type and name, location, level, teacher and / or manager, tuition, days offered, gender of Students, and whether to search among all classes, just those currently offered or just those to be offered in the future.

Enrolling Students and Making Enrollment Changes

-continued-

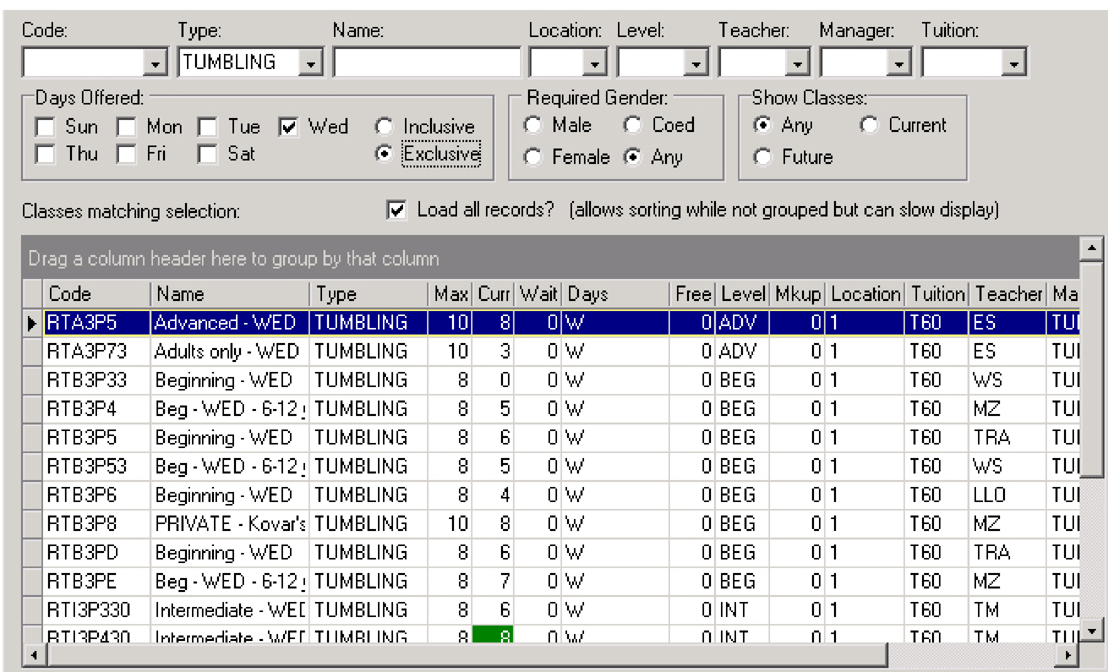
For example, if you wanted a listing of the tumbling classes offered by your school (assuming you offer several), you could choose "Tumbling" for **Type:** and leave the other fields blank.

The **Classes matching selection** section would then display all tumbling classes offered by your school, from which you could select the most appropriate one:



Code	Name	Type	Max	Curr	Wait	Days	Free	Level	Mkup	Location	Tuition	Teacher	Mai
RTA1P430	Advanced - MON	TUMBLING	10	10	0	M	0	ADV	0	1	T60	ES	TUI
RTA3P5	Advanced - WED	TUMBLING	10	8	0	W	0	ADV	0	1	T60	ES	TUI
RTA3P73	Adults only - WED	TUMBLING	10	3	0	W	0	ADV	0	1	T60	ES	TUI
RTA5P6	Advanced - FRI	TUMBLING	10	6	0	F	0	ADV	0	1	T60	ES	TUI
RTA6P123	Advanced - SAT	TUMBLING	10	2	0	S	0	ADV	0	1	T60	TM	TUI
RTB1P33	Beginning - MON	TUMBLING	8	9	1	M	0	BEG	0	1	T60	TRA	TUI
RTB1P330	Beg - MON - 6-12 y	TUMBLING	8	7	0	M	0	BEG	0	1	T60	ES	TUI
RTB1P5	Beg - MON - 6-12 y	TUMBLING	8	4	0	M	0	BEG	0	1	T60	TM	TUI
RTB1P53	Beginning - MON	TUMBLING	8	8	0	M	0	BEG	0	1	T60	ES	TUI
RTB1P6	Beginning - MON	TUMBLING	8	7	0	M	0	BEG	0	1	T60	MZ	TUI
RTB1P63	Beginning - MON	TUMBLING	8	8	0	M	0	BEG	0	1	T60	TRA	TUI
RTB1PD3	Beginning - MON	TUMBLING	8	8	0	M	0	BEG	0	1	T60	TRA	TUI

Or, perhaps you want a listing of all tumbling classes offered on Wednesday. In this case, select **Wednesday** and **Exclusive** in the **Days Offered:** section. The **Classes matching selection** section will display all tumbling classes that meet only on Wednesday:



Code	Name	Type	Max	Curr	Wait	Days	Free	Level	Mkup	Location	Tuition	Teacher	Ma
RTA3P5	Advanced - WED	TUMBLING	10	8	0	W	0	ADV	0	1	T60	ES	TUI
RTA3P73	Adults only - WED	TUMBLING	10	3	0	W	0	ADV	0	1	T60	ES	TUI
RTB3P33	Beginning - WED	TUMBLING	8	0	0	W	0	BEG	0	1	T60	WS	TUI
RTB3P4	Beg - WED - 6-12 y	TUMBLING	8	5	0	W	0	BEG	0	1	T60	MZ	TUI
RTB3P5	Beginning - WED	TUMBLING	8	6	0	W	0	BEG	0	1	T60	TRA	TUI
RTB3P53	Beg - WED - 6-12 y	TUMBLING	8	5	0	W	0	BEG	0	1	T60	WS	TUI
RTB3P6	Beginning - WED	TUMBLING	8	4	0	W	0	BEG	0	1	T60	LLO	TUI
RTB3P8	PRIVATE - Kovar's	TUMBLING	10	8	0	W	0	BEG	0	1	T60	MZ	TUI
RTB3PD	Beginning - WED	TUMBLING	8	6	0	W	0	BEG	0	1	T60	TRA	TUI
RTB3PE	Beg - WED - 6-12 y	TUMBLING	8	7	0	W	0	BEG	0	1	T60	MZ	TUI
RTI3P330	Intermediate - WED	TUMBLING	8	6	0	W	0	INT	0	1	T60	TM	TUI
RTI3P430	Intermediate - WED	TUMBLING	8	8	0	W	0	INT	0	1	T60	TM	TUI

Enrolling Students and Making Enrollment Changes

-continued-

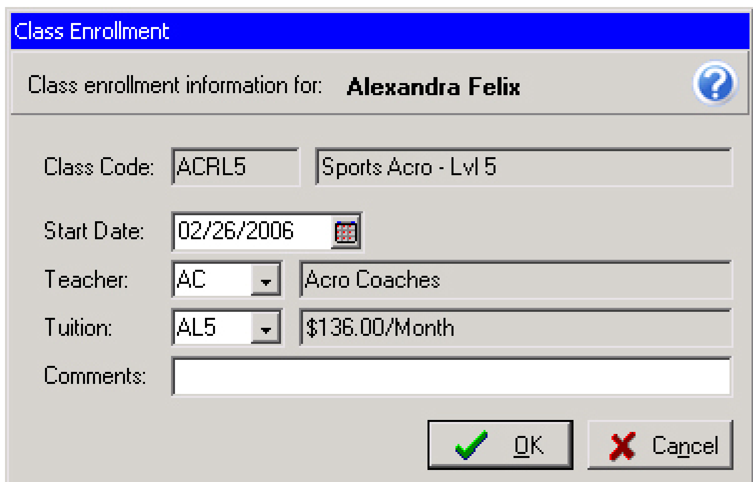
Note this distinction in the above example: You selected **Wednesday** / **Exclusive** (instead of **Inclusive**), so ProSchool returned *only* the tumbling classes held on Wednesday *only*.

If, however, you wanted to know what tumbling classes met on Wednesdays—*regardless* of any other days they also met (such as a Monday–Wednesday–Friday tumbling class), you would select **Wednesday** and **Inclusive**. This would be useful, for example, if you wanted to add an additional Monday–Wednesday tumbling class and wanted to know if there were other tumbling classes already meeting on either or both of those days.

You can select other criteria in the **Location:**, **Level:**, **Tuition:** and **Required Gender:** fields to help you fine-tune your search. This makes class selection efficient when you are looking for a certain type of class to suit a new Student's abilities, held on the day(s) the Student is able to attend and which is suitable for the Student's gender, skill level, etc. The function is especially helpful when you have a large Student population with a large number of class offerings.

6. To select a class, highlight the class name in the **Classes matching selection:** section and click 

. The **Class Enrollment** window opens to help you confirm your choice:

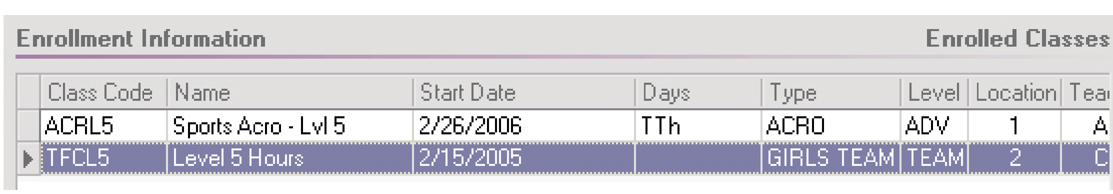


Note that the **Start Date:**, **Teacher:** and **Tuition:** fields all default to the values previously established. However, if this Student has a special situation that requires a change in any of those fields, you can override the defaults and enter the appropriate information.

For example, you may have a Student who will not be charged the same tuition as the other Students in that class. The **Class Enrollment** window gives you the opportunity to make that change. You can also add comments if you wish (which is useful for conveying pertinent information to coaches, as the contents of the **Comments:** field appears on the class roll sheet report).

7. Click 

to add this Student to this class. No further confirmation window will appear; the Student is now enrolled in this class, as can be confirmed in the **Enrollment Information** section of the **Family Information** window:

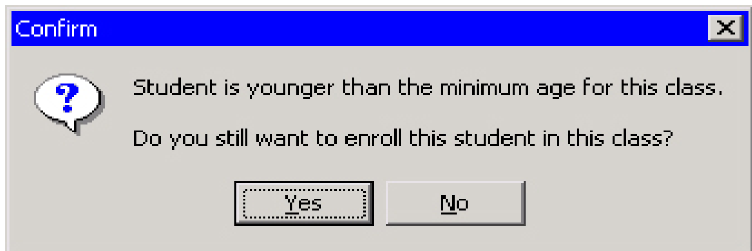


Enrolling Students and Making Enrollment Changes

-continued-

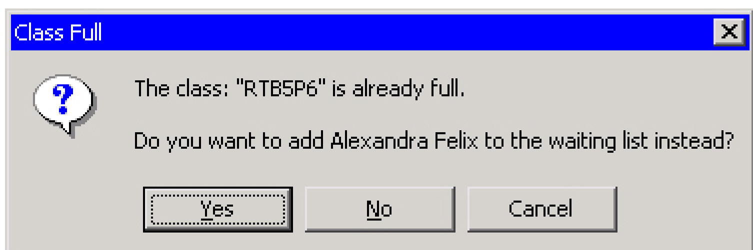
Hint: Remember that ProSchool allows you to customize the table (columns and rows) of the **Choose a Class For...** *window—and other ProSchool windows with similar table-based layouts—by right-clicking on the column headers.*- *For a refresher course, see Customizing Table Layouts In ProSchool Screens on page 155.*

? What if the Student's age does *not* match the age range of the class you chose to add them to? A dialog box will appear after you click **OK** in the **Choose a Class for [Student name]** window, informing you of this potential mismatch and asking you if you want to enroll the Student in the class anyway:



Click **Yes** to do so and change the records accordingly. Otherwise, click **No** to cancel the add and return you to the **Family Information** window.

Likewise, if the class you select for the Student is full, a dialog box will appear advising you of that fact and asking if you want to add the Student to that class's waiting list:



Click **Yes** to add the Student to the waiting list and return to the **Enrolled Classes** window.

OR...

Click **No** to add the Student to the class anyway. You will proceed through the **Class Enrollment** window, then back to the **Enrolled Classes** window.

OR...

Click **Cancel** to abandon the add process entirely and return to the **Enrolled Classes** window.

Enrolling Students and Making Enrollment Changes

-continued-

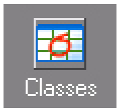
ENROLLING STUDENTS FROM THE "CLASS INFORMATION" WINDOW

ProSchool conveniently allows you to enroll Students from the **Class Information** window as well. The process is essentially the reverse of that described in the previous section; here, you first find and select the class you want, then add the Student.

To enroll Students from the Class Information window:

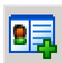
1. Click 

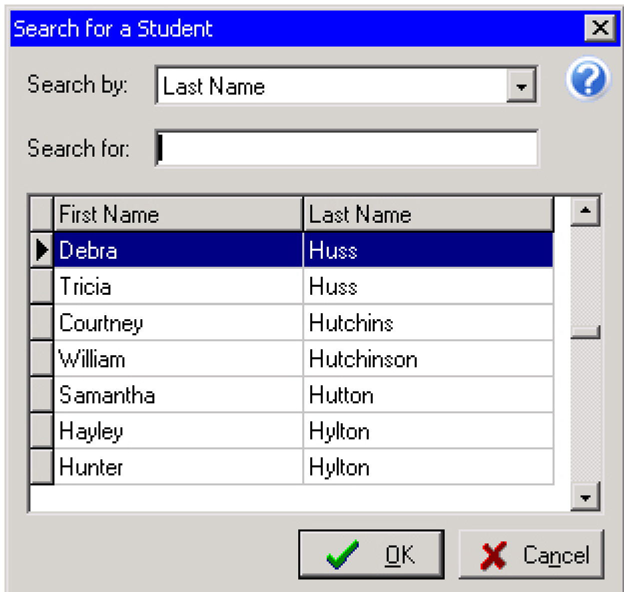
(the **Tasks** button on the left) to reveal the task menu buttons.

2. Click 

(the **Classes** menu button) to open the **Class Information** panel:

3. Select the class you want to enroll a Student in.

4. Click  to open the **Search For A Student** window:



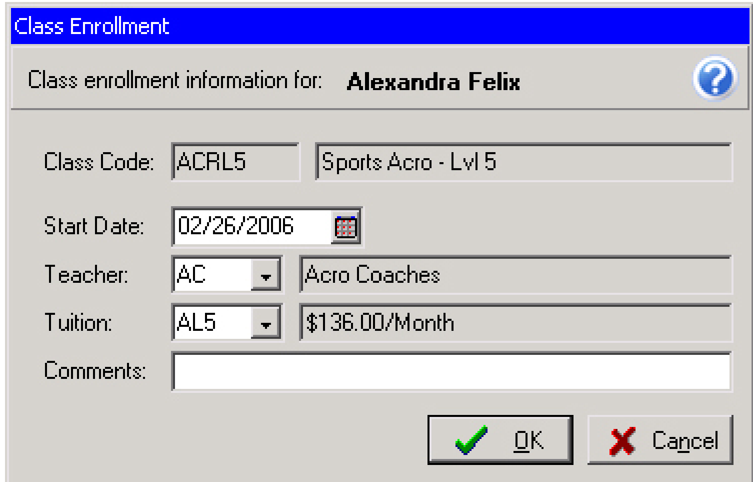
5. You can search by scrolling down through the list of names, or by selecting from among the search criteria in the **Search by:** pull-down menu, then typing the appropriate information in the **Search for:** field. As you do, all Student names matching your criteria will appear.

Enrolling Students and Making Enrollment Changes

-continued-

6. Select the Student you wish to add to the previously selected class and click 

to open the **Class Enrollment** window (the same window used in the previous enrollment method, so it should be familiar to you now):



You can confirm your choice, and also make any necessary changes to the defaults, if necessary. You can also add comments if you wish (which is useful for conveying pertinent information to coaches, as the contents of the **Comments:** field appears on the class roll sheet report).

Click 

to add this Student to this class. No further confirmation window will appear; the Student is now enrolled in this class, as can be confirmed in the **Enrollment Information** section of the **Class Information** window.

Enrolling Students and Making Enrollment Changes

ENROLLMENT CHANGES: ADDS, DROPS AND TRANSFERS (OVERVIEW)

ProSchool makes it easy to add, drop or transfer Students. In addition, you can check enrollment status for any class and make various enrollment changes.

As with the enrollment process, changes in enrollment (adds, drops and transfers) are easy to make because they can be accomplished in one of two ways:

- By starting in the **Family Information** window, specifying the Student on whose behalf you wish to make a change, drilling down to the class that will be involved in the change, and then completing the change.

-continued-

OR...

- By starting in the **Class Information** window, specifying the class (which gives you access to all Students in that class), drilling down to the Student on whose behalf you wish to make a change, and then completing the change.

In either case, the common element is the **Enrollment Information** section, which appears in the lower right-hand section of both the **Family Information** and **Class Information** windows. The key is *what* information appears in this section:

- in the **Family Information** view, the **Enrollment Information** section displays **classes**;
- in the **Class Information** view, the **Enrollment Information** section displays **Students**.

In other words, ProSchool gives you convenient ways to make these changes, and either method gives you full access to the information you need to make it happen.

The previous section dealt with how to enroll (add) Students into classes. In this section, we'll take it several steps further and show you how to:

- *drop* a Student from a class;
- *drop all* Students from a class (for example, if the class were cancelled);
- *transfer* a Student from one class to another;
- *transfer all* Students from one class to another (for example, those Students dropped from a cancelled class);
- *edit* specific class enrollment information;
- *show the waiting list* for a class;
- *show the enrolled list* for a class;
- *add a Student to the waiting list* for a class;
- *move the Student from the waiting list to the enrollment list* for a class;
- *move the Student from the enrolled list to the waiting list* for a class;

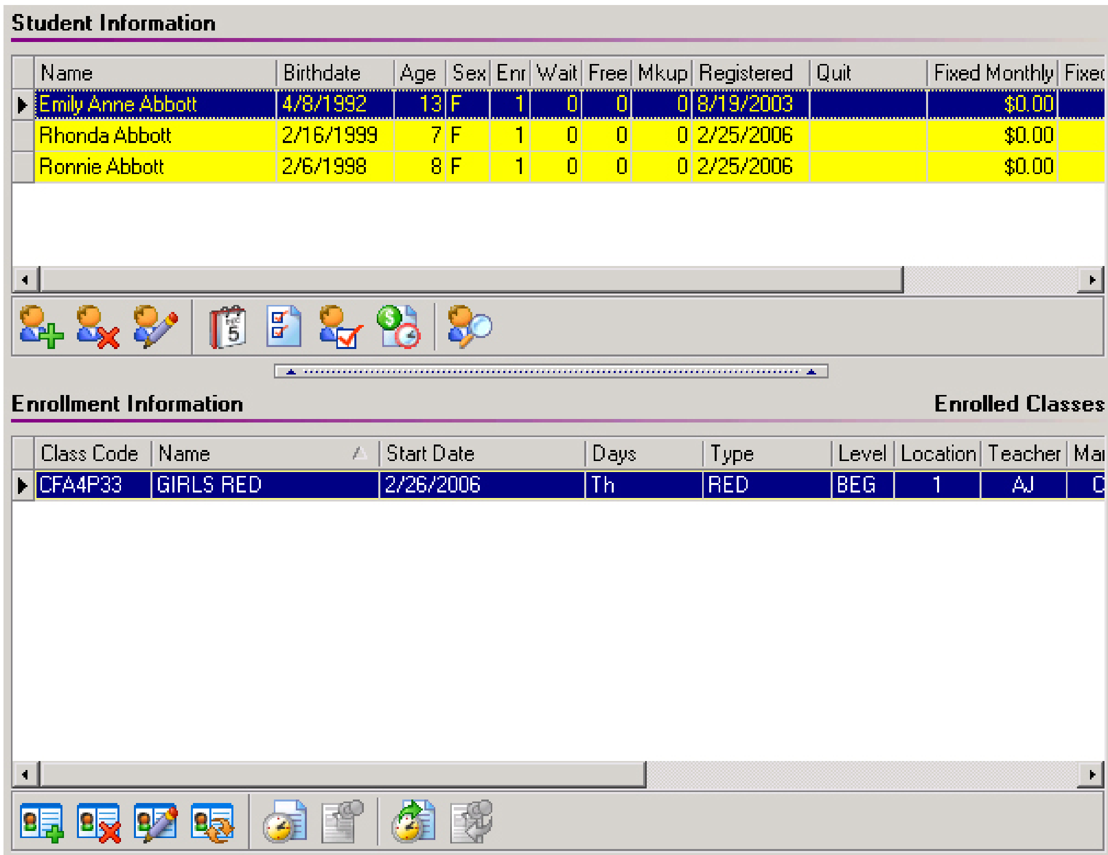
Enrolling Students and Making Enrollment Changes

-continued-

Making Enrollment Changes

To make enrollment changes from the Family Information screen:

1. Select the Family, then click on the Student's name in the upper right-hand **Student Information** section. Any classes the Student is currently enrolled in will appear in the **Enrollment Information** section immediately below it:



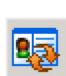
Note that the Student, Emily Anne Abbot, is selected in the **Student Information** section, and the class in which she is currently enrolled—"CFA4P33 / Girls Red Squad"—is highlighted in the **Enrollment Information** section. If there is only one Student or class in its respective section, ProSchool will automatically highlight it; if there are multiple Students, or multiple classes, you can select the one you wish to change (just click on it).

Now that you have a class selected, focus on the row of buttons along the bottom edge of the **Enrollment Information** section:

 - **enroll** Student in the selected class (explained in the previous section);

 - **drop** ("un-enroll") a Student from the selected class;

 - **edit** Student's enrollment record for the selected class;

 - **transfer** Student from the selected class to another class;

Enrolling Students and Making Enrollment Changes

-continued-

The next two buttons toggle between two views; both will never be active simultaneously (i.e., it's either one view or the other). This set of buttons does not initiate any action (i.e. no enrollment changes are initiated)—it only determines what you'll see in the **Enrollment Information** section:

 - **view the waiting list** for the selected class;

 - **view enrolled list** for the selected class.

The **Enrollment Information** section contains a heading at the top-right corner which indicates what you're seeing (depending on which of the above buttons you've clicked):

- the "**Enrollment Classes**" view shows the classes in which the selected Student is enrolled;
- the "**Waiting List Classes**" view shows any classes for which the selected Student is on the waiting list.

The next two buttons initiate opposite actions; they too will never be active simultaneously. However, there are certain conditions under which *neither* is active (i.e., both are grayed out):

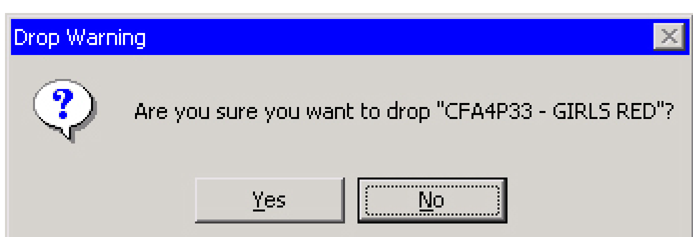
 - **add Student** to the *waiting* list for the selected class;

 - **add Student** to the *enrolled* list for the selected class;

 - **both inactive** (neither action can be undertaken). This condition occurs when the Student is on the waiting list but you have the "Enrolled List" view selected.

If the logic of active/inactive status of the above buttons is confusing, don't let it trip you up—just proceed knowing that it'll come to make sense as you become more familiar with ProSchool. Again: If a given button is inactive, the conditions do not exist for the action to be taken. When they do, the button will become active.

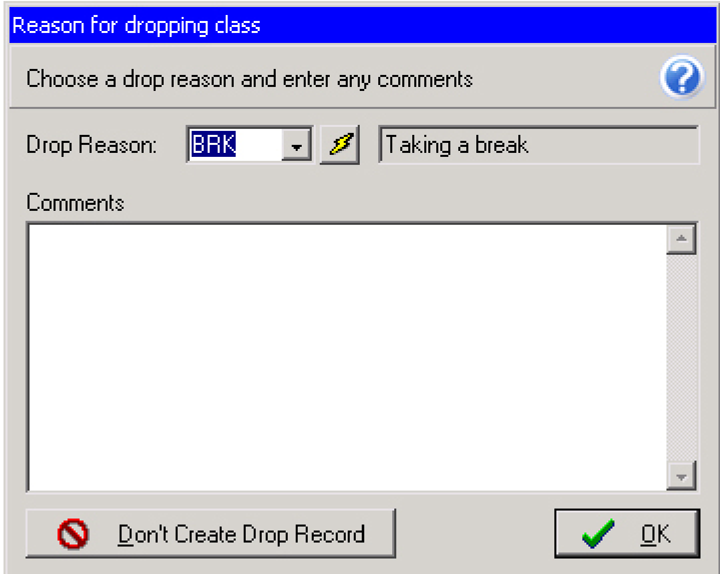
2. Click  to **drop** the Student from the selected class. A confirmation dialog window will appear to confirm your intentions:



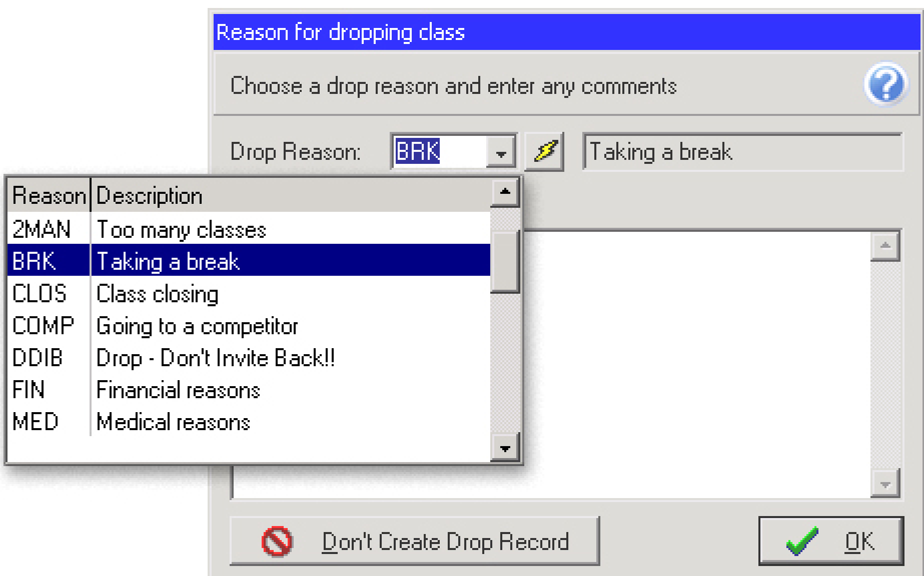
Enrolling Students and Making Enrollment Changes

-continued-

3. Click **Yes** to drop the selected Student from the class (or **No** to cancel the drop). If you click **Yes**, the **Reason for dropping class** window opens:



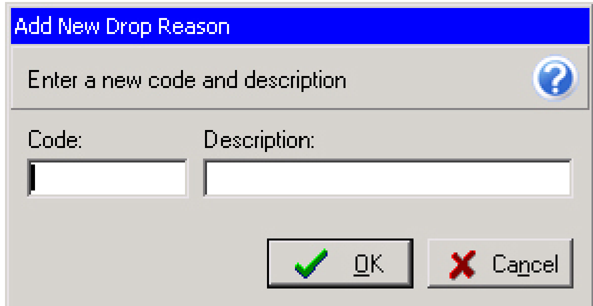
This window allows you to document the reasons for the drop and add comments if necessary. Clicking on the **Drop Reasons** drop-down menu reveals the drop codes you previously created while building your schools codes:



Enrolling Students and Making Enrollment Changes

-continued-

4. Click on the reason code that applies. If none apply to the Student's situation, you can create a new drop code by clicking to open the **Add A New Drop Reason** window:

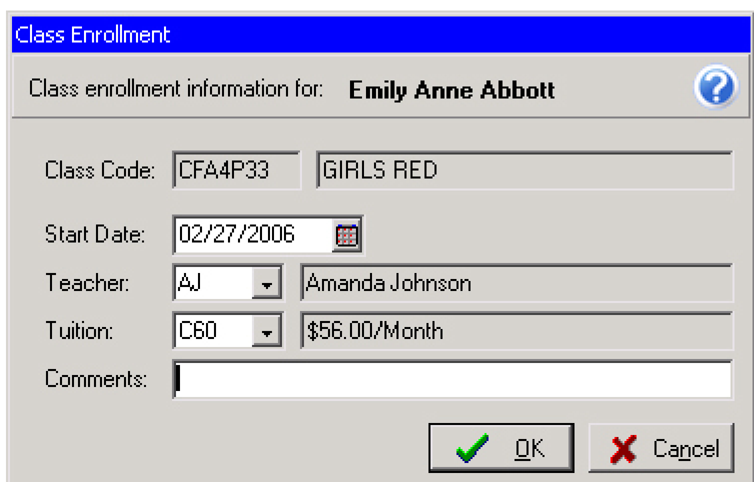


5. After adding a new drop code, click OK save it and close this window (or click Cancel to abandon the process). Clicking the **OK** button returns you to the **Reason for dropping class** window. Also, note that the newly-created drop reason is automatically selected and now appears in the **Drop Reason** field.

6. If you have additional comments relating to this drop, enter them in the **Comments** window.

7. If you do not wish to create a drop record, click Don't Create Drop Record to proceed with the drop *without* creating a drop record. This is useful, for example, if this Student was added to this class in error and you are simply correcting that error.

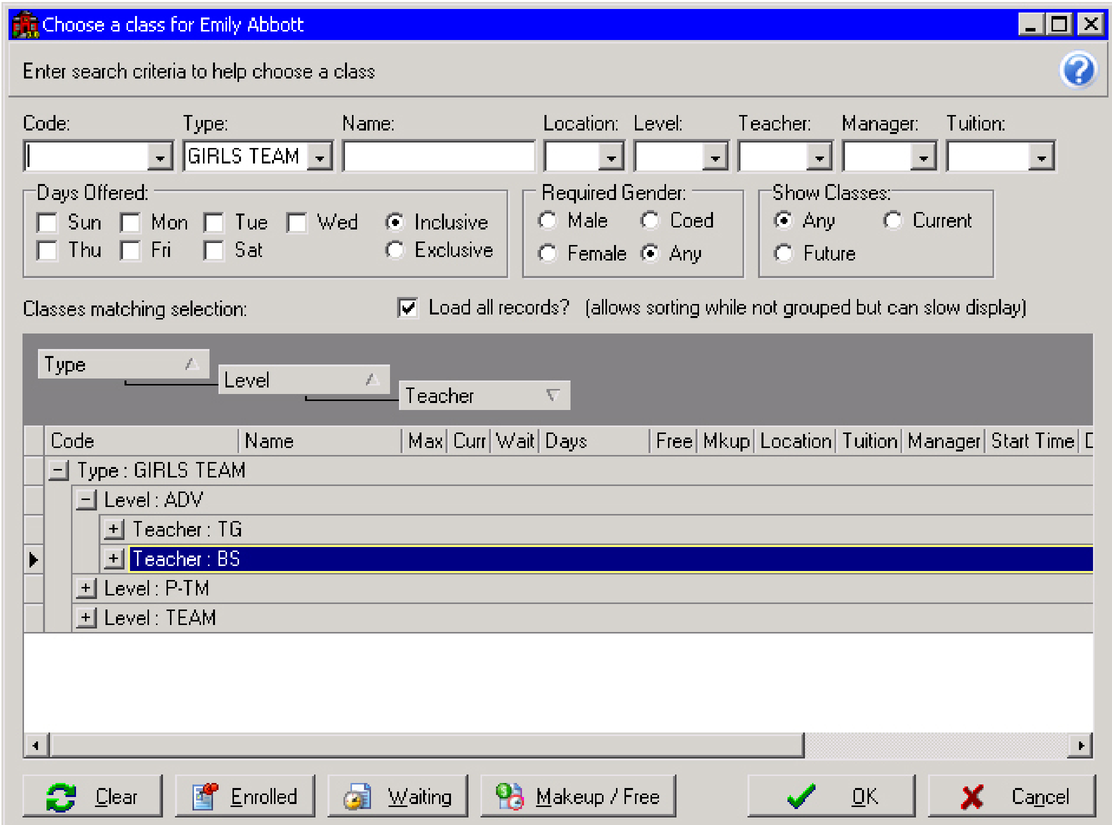
8. To edit the Student's enrollment record, click to open the **Class Enrollment** window:



Note this is the same window that appears with you first add a Student to a class, so it should look familiar to you by now. Make the desired changes and click OK to save the changes (or Cancel to abandon the changes and close the window).

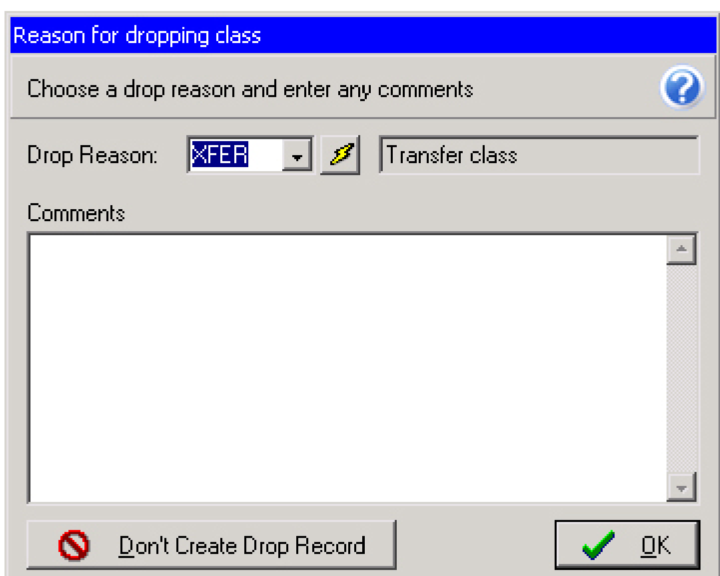
-continued-

9. To transfer the Student to another class, click  to open the **Choose a Class for...** window:



10. Select the class you want to transfer the Student into, then click 

to initiate the transfer. The **Reason for dropping class** window will open:



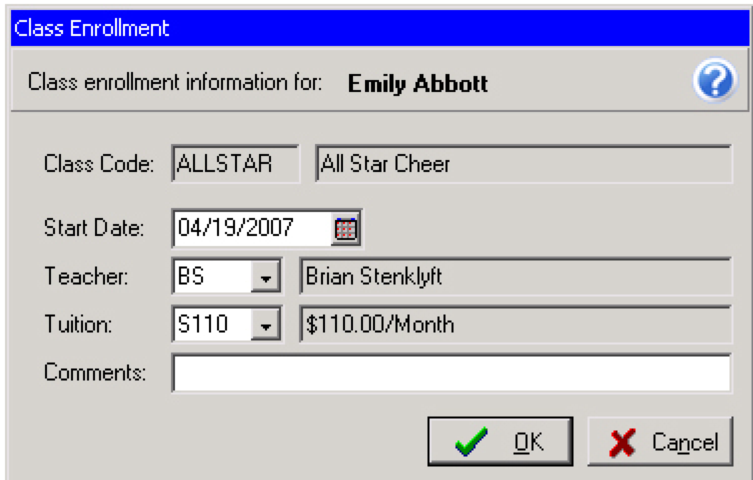
Note that the **Drop Reason:** field defaults to “XFER”, since this is the reason typically used in this scenario (though you can choose another if you wish).

Enrolling Students and Making Enrollment Changes

-continued-

11. Enter any relevant comments, if you wish, in the **Comments** section.

12. Click OK to save the drop reason and complete the transfer. If you *don't* want ProSchool to create a drop record for this transfer, click Don't Create Drop Record to continue with the transfer (no drop record will be created). The **Class Enrollment** window will open to confirm the transfer:



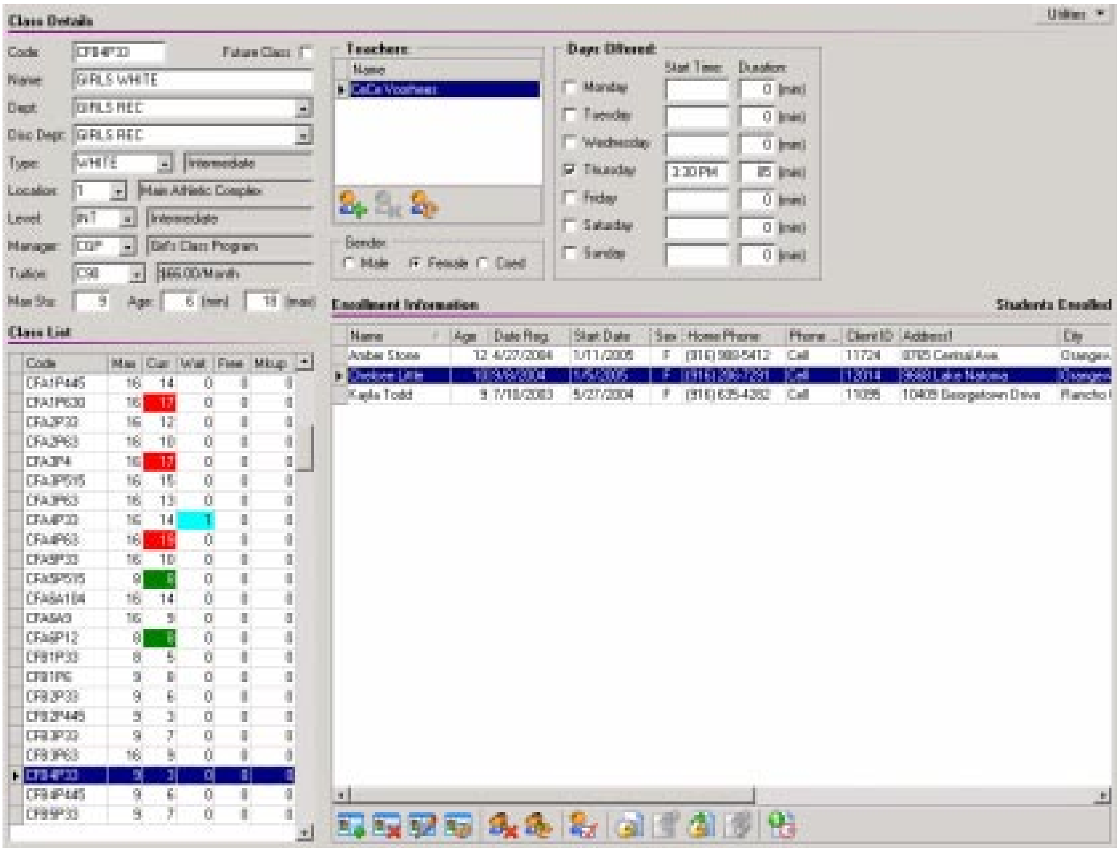
13. Click OK to accept the transfer (or Cancel to reject it). If you accept the enrollment, the new class information for this Student will appear in the **Enrollment Information** pane of the **Family Information** window.

Enrolling Students and Making Enrollment Changes

-continued-

To make enrollment changes from the Class Information screen:

1. Select the class in the lower-left **Class List** section. All Students currently enrolled in the selected class will appear in the lower-right **Enrollment Information** section:



Note that all Students currently enrolled in the selected class appear in the **Enrollment Information** section. If there is only one Student listed, ProSchool automatically highlights them; if there are multiple Students, you can select the one you want by clicking on it).

After selecting the Student for whom you want to make enrollment changes, the actions you undertake will be indicated by the buttons along the bottom of the **Enrollment Information** section. This will mostly be familiar territory, as most of these buttons were described in the previous section. Here, their actions here are exactly the same.

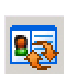
In addition to the familiar buttons, there are four new ones. For the sake of clarity, we'll explain all the buttons again in this section's context of making enrollment changes using a *class*-driven approach (as opposed to the previous section, in which we made enrollment changes using a *Student*-driven approach).

The buttons function as follows:

 - **enroll** a new Student in this class;

 - **drop** ("un-enroll") the selected Student from this class;

 - **edit** the selected Student's enrollment record for this class;

 - **transfer** the selected Student from this class to another;

Enrolling Students and Making Enrollment Changes

-continued-

The next two buttons are new. They enable you to drop or transfer all Students in this class (a “batch” drop), as follows:

 - **drop all Students** in this class;

 - **transfer all Students** from this class to another class.

These functions are useful when a class has been cancelled, because it enables you to process all Students with a few clicks, as opposed to having to drop or transfer each Student individually. The “drop all...” button would be used if a class is cancelled and there is no identical replacement class available; the “transfer all...” button is useful for transferring Students to a replacement class if their existing class is cancelled.

NOTE: **PROCEED WITH CARE!** THESE CHOICES MAKE MAJOR CHANGES TO YOUR STUDENT AND CLASS RECORDS. **THERE IS NO “UNDO” FUNCTION TO REVERSE THE “BATCH” DROPS OR TRANSFERS YOU INITIATE.** IF YOU ACCIDENTALLY DROP OR TRANSFER STUDENTS, OR INTENTIONALLY DO SO AND LATER CHANGE YOUR MIND, YOU WILL HAVE TO INDIVIDUALLY RE-ENROLL EACH STUDENT IN THE CLASS.

The next two buttons toggle between two views; both will never be active simultaneously (i.e., it’s either one view or the other). This set of buttons does not initiate any action (i.e. no enrollment changes are initiated)—it only determines what you’ll see in the **Enrollment Information** section:

 - **view the Students on the waiting list** for this class;

 - **view the Students enrolled** in this class.

The **Enrollment Information** section contains a heading at the top-right corner which indicates what you’re seeing (depending on which of the above buttons you’ve clicked):

- the “**Students Enrolled**“ view shows all Students currently enrolled in this class;
- the “**Students Waiting**“ view shows all Students on the waiting list for this class.

The next button is new. It allows you to view the selected Student’s skills:

 - **view the selected Student’s skills**. (opens the **Student Skills** window for the selected Student).

The next two buttons initiate opposite actions; they too will never be active simultaneously. However, there are certain conditions under which *neither* is active (i.e., both are grayed out):

 - **add selected Student** to the *waiting* list for this class;

 - **add selected Student** to the *enrolled* list for the selected class;

 - **both inactive** (neither action can be undertaken). This condition occurs when the Student is on the waiting list but you have the “Enrolled List” view selected.

Enrolling Students and Making Enrollment Changes

-continued-

The final button is new. It allows you to view any make-up or free classes for this class, and schedule a make-up or free class for the selected Student:

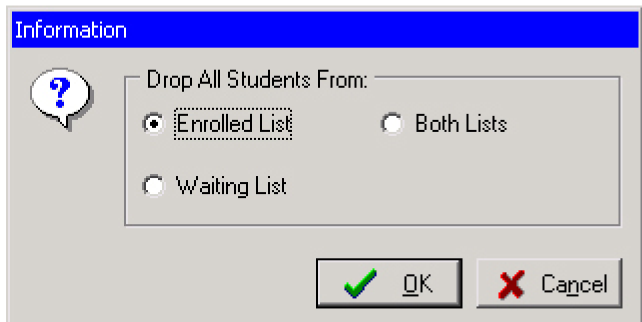
 - **view make-up and free classes** for the selected Student. This button and its associated actions will be introduced and explained in the following section.

2. Click  to **drop** the selected Student from this class (this process is described in detail in the previous sections).

3. To **edit** the selected Student's enrollment record, click  (this process is described in detail in the previous sections).

4. To **transfer** the selected Student from this class to another class, click  (this process is described in detail in the previous sections).

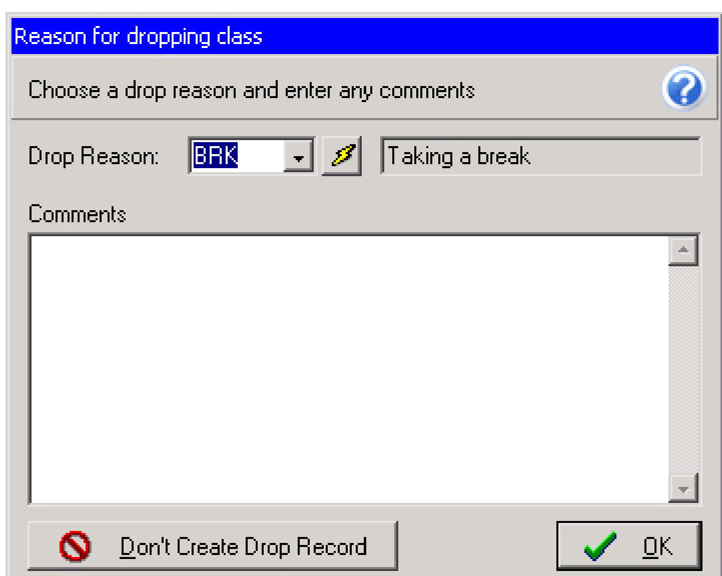
5a. To **drop ALL Students** from this class, click  to open the **Information** window:



5b. Specify which list you want to drop all Students from—the Enrolled list (Students currently enrolled in the class) or the waiting list (Students waiting to get into the class), or both. (The "waiting list" option is useful when you cancel a class that currently has a waiting list; you can easily eliminate all Students from that list with a few clicks.) Click 

complete the batch drop process (or 

to abandon the batch drop process). The Drop Reason dialog box will appear:



Enrolling Students and Making Enrollment Changes

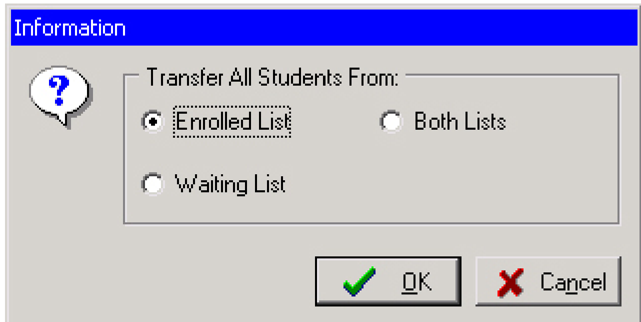
-continued-

5c. Select your drop reason (as explained in a previous section) and click 

to complete the batch drop process and record the selected drop reason for each of the Students dropped from this class (or 

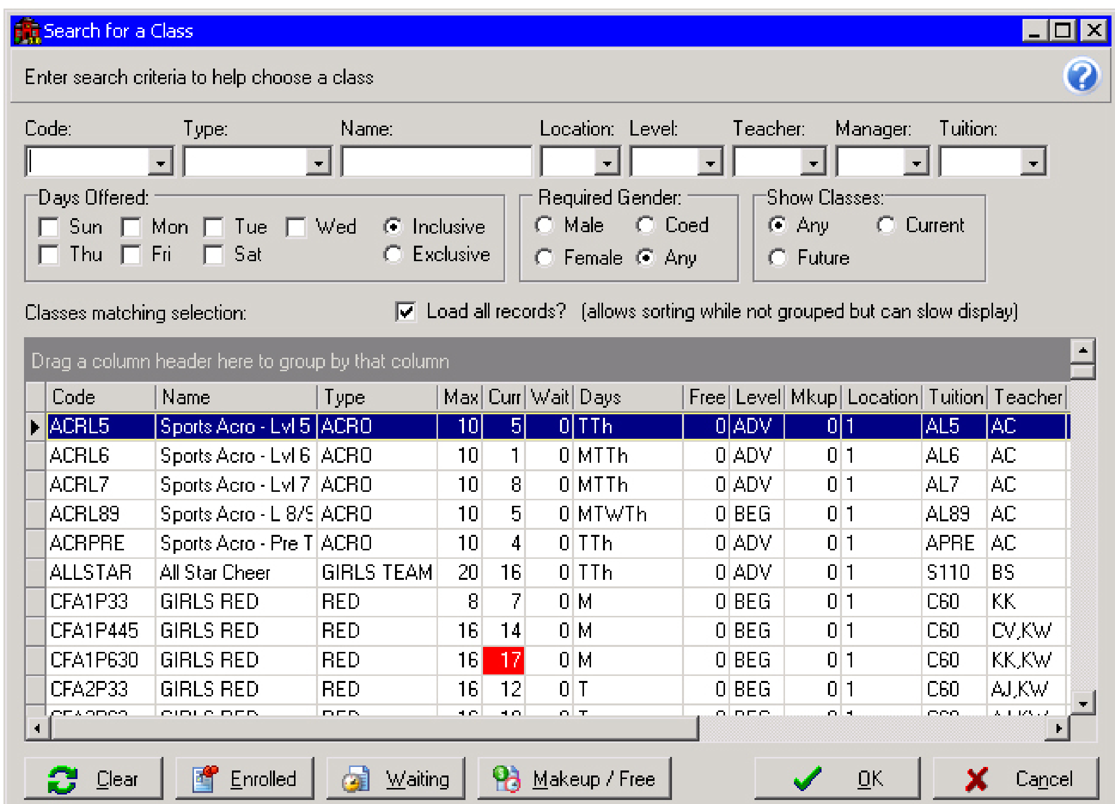
to complete the batch drop without recording a drop reason for the dropped Students.).

6a. To **transfer ALL Students** from this class to another class, click  to open the **Information** window (very similar to the window shown immediately above):



6b. Specify which list you want to *transfer* all Students from—the Enrolled list (Students currently enrolled in the class) or the Waiting list (Students waiting to get into the class), or both. (The "waiting list" option is useful when you open a new class that can accommodate the Students on the waiting list). Click 

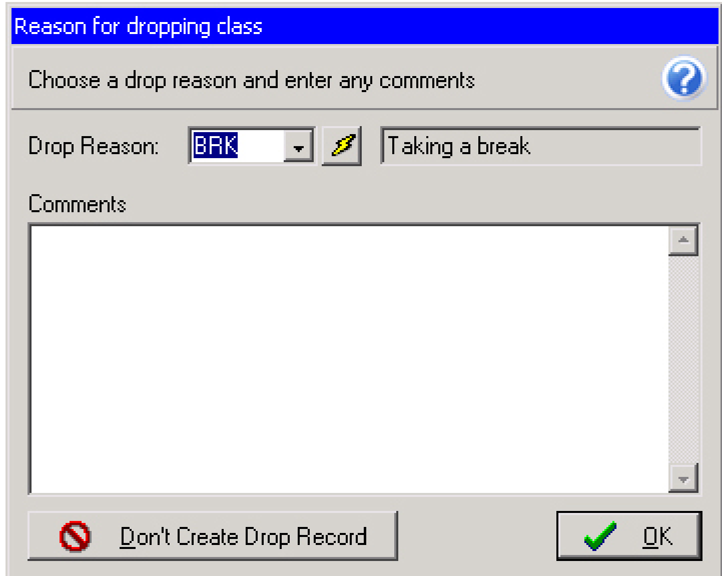
complete the batch transfer process and open the Select A Class window:



Enrolling Students and Making Enrollment Changes

-continued-

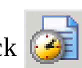
6c. Select a class either by using the search functions, or by double-clicking on a class. After you do either, the **Drop Reason** dialog box will appear:



6e. Select your drop reason (as explained in a previous section) and click 

to complete the batch transfer process and record the selected drop reason for each of the Students transferred from this class (or 

to complete the batch drop *without* recording a drop reason for the dropped Students.).

7. To **view the waiting list** for this class, click  (described in previous sections).

8. To **view the enrolled list** for this class, click  (described in previous sections).

9. To **place the selected Student on the waiting list** for this class, click  (described in previous sections).

10. To **place the Student on the enrolled list** for this class, click  (described in previous sections).

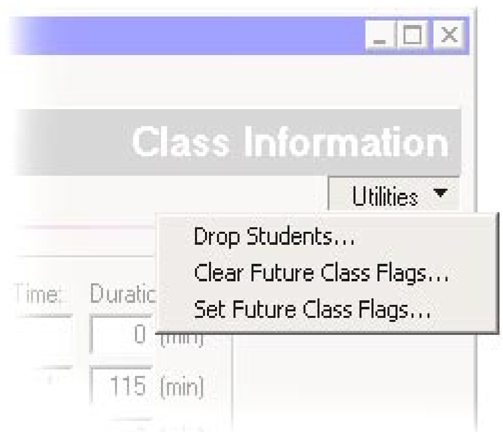
Enrolling Students and Making Enrollment Changes

-continued-

USING UTILITIES TO MAKE CLASS ("BATCH") ENROLLMENT CHANGES

ProSchool's **Class Information** panel also includes a set of three useful and powerful utilities designed to act on an entire set of classes. This translates into a quick way to "batch" process a large number of classes in very little time.

These utilities are accessed via a pull down menu in the upper right-hand corner of the **Class Information** window:



There are three utilities:

- **Drop Students...** offers you a quick and easy way to "batch" drop Students from multiple classes;
- **Set Future Class Flags...** offers you a quick and easy way to "batch" designate multiple classes as future classes;
- **Clear Future Class Flags...** offers you a quick and easy way to "batch" designate multiple classes as current classes.

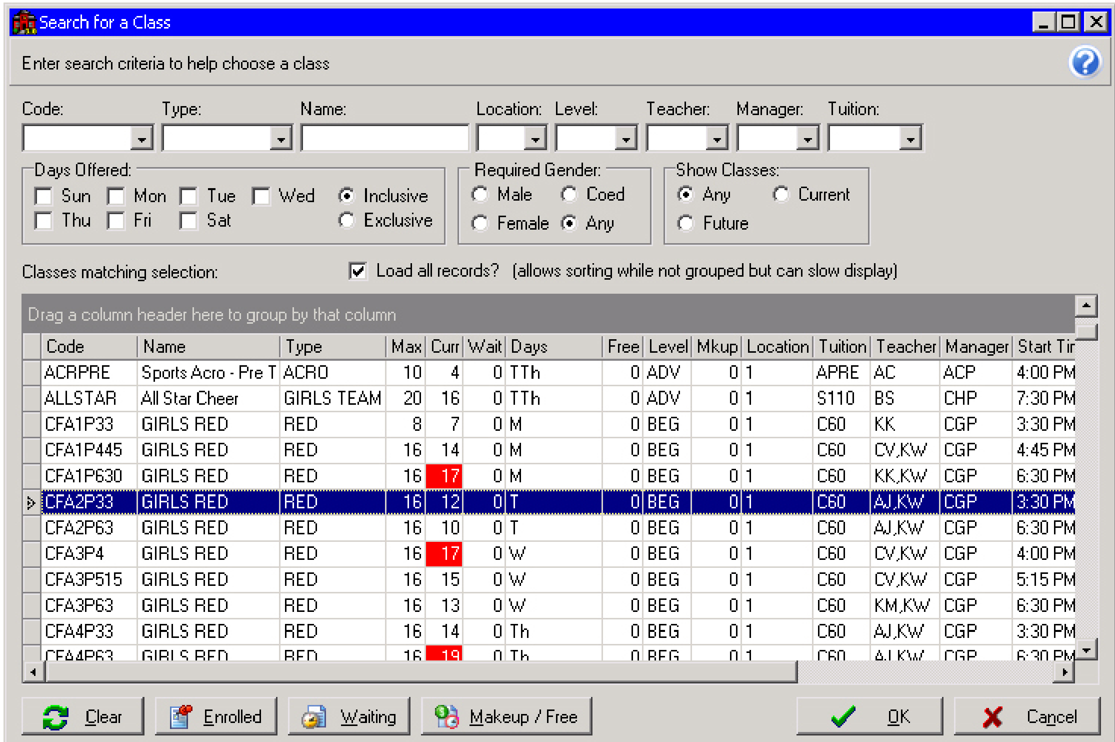
Together, these three utilities make it convenient and easy to accomplish common class-related tasks on groups of classes at one time.

Enrolling Students and Making Enrollment Changes

-continued-

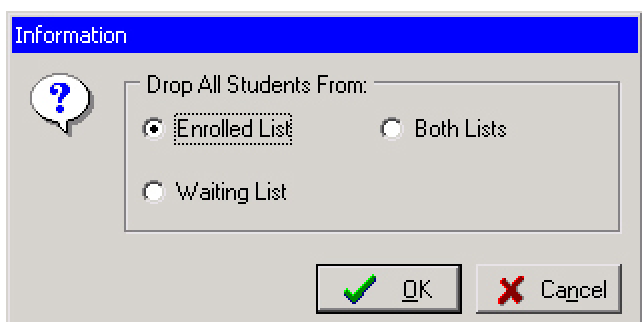
To drop ALL Students from a class and/or class waiting list:

1. Click the Utilities pull down menu and click on **Drop Students...** to open the **Search for a Class** window:



2. Select a class either by using the search functions, or by double-clicking on a class. To select a *contiguous* block of classes, click on the first class, then hold down the **Shift** key and click on the last class. Your first and last class, and all classes in between the two, will be selected. To select individual classes that are *not* contiguous, hold down the **Ctrl** key while clicking on your desired classes.

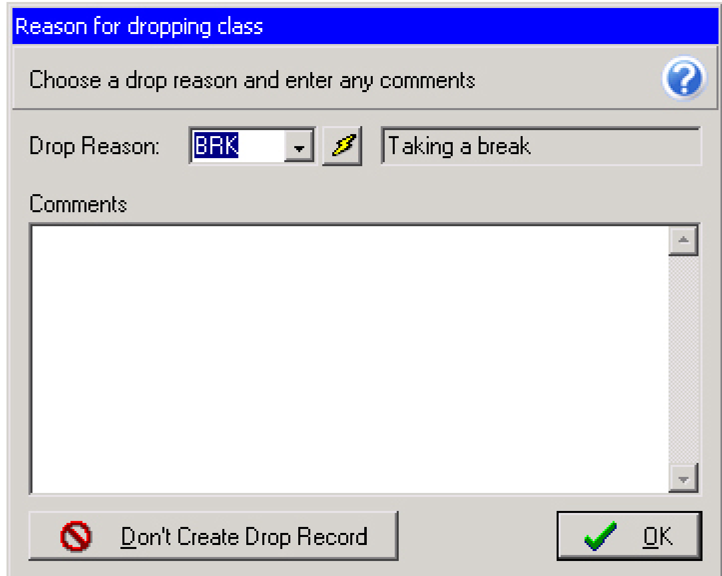
After you make your selection, the **Information** window opens to confirm your intentions, and as shown in the previous section, allows you to select exactly how the Students will be dropped:



Enrolling Students and Making Enrollment Changes

-continued-

3. Click OK to open the **Reason for dropping class** window:

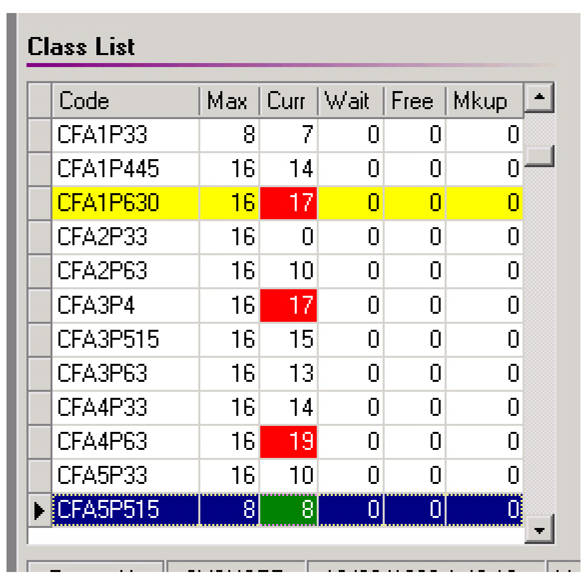


4. Select your drop reason (as explained in a previous section) and click OK to complete the batch drop process and record the selected drop reason for each of the Students dropped from this class (or Don't Create Drop Record to complete the batch drop without recording a drop reason for the dropped Students.).

 **To SET future class flags:**

1. Click the Utilities pull down menu and click on **Set Future Class Flags...** to open the **Search for a Class** window (as shown previously).

2. Select a class as described in the preceding section, then click OK to flag the class as a future class. Flagged classes are highlighted in yellow wherever a class listing is shown; this is how it would appear in the Class Information window:



Code	Max	Curr	Wait	Free	Mkup
CFA1P33	8	7	0	0	0
CFA1P445	16	14	0	0	0
CFA1P630	16	17	0	0	0
CFA2P33	16	0	0	0	0
CFA2P63	16	10	0	0	0
CFA3P4	16	17	0	0	0
CFA3P515	16	15	0	0	0
CFA3P63	16	13	0	0	0
CFA4P33	16	14	0	0	0
CFA4P63	16	19	0	0	0
CFA5P33	16	10	0	0	0
CFA5P515	8	8	0	0	0

Enrolling Students and Making Enrollment Changes

The process for clearing a future class flag is almost identical to setting one.

To CLEAR future class flags:

1. Click the Utilities pull down menu and click **Clear Future Class Flags...** to open the **Search for a Class** window (as shown previously).

2. Select the flagged class you want to clear.

3. Click 

to clear the selected class (i.e., “unflag” it). The class will no longer appear highlighted in yellow wherever classes are listed.

-continued-

Enrolling Students and Making Enrollment Changes

-continued-

SCHEDULING MAKE-UP & FREE CLASSES

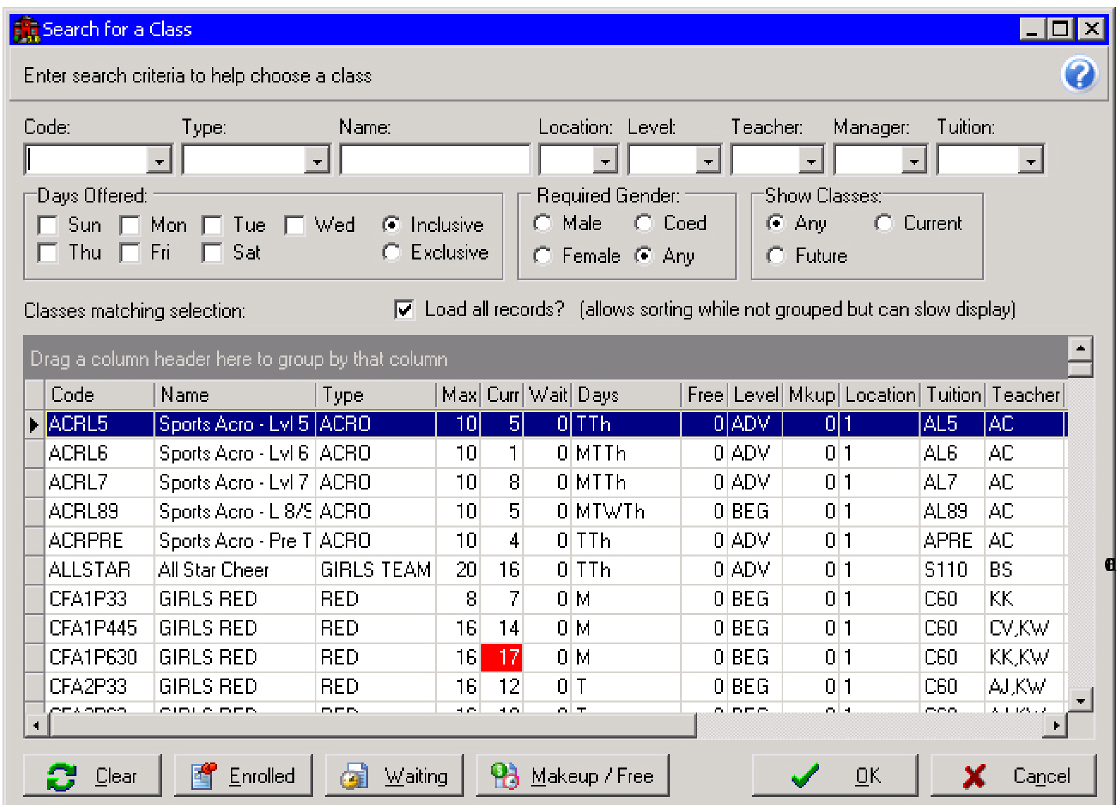
ProSchool allows you to schedule make-up and free classes if you wish to do so. Students can be enrolled into these classes from either the **Class Information** window, or the **Student Information** section of the **Family Information** window. In this section, you'll learn how to do so from either.

To schedule Students in Free or Make-up classes from the Class Information window:

1. Click Tasks (the **Tasks** button on the left) to reveal the task menu buttons.

2. Click Classes (the **Classes** menu button) to open the **Class Information** panel:

3. To find the class you want to enroll the Student in for a make-up or free class, click to open the **Search for a Class** window:

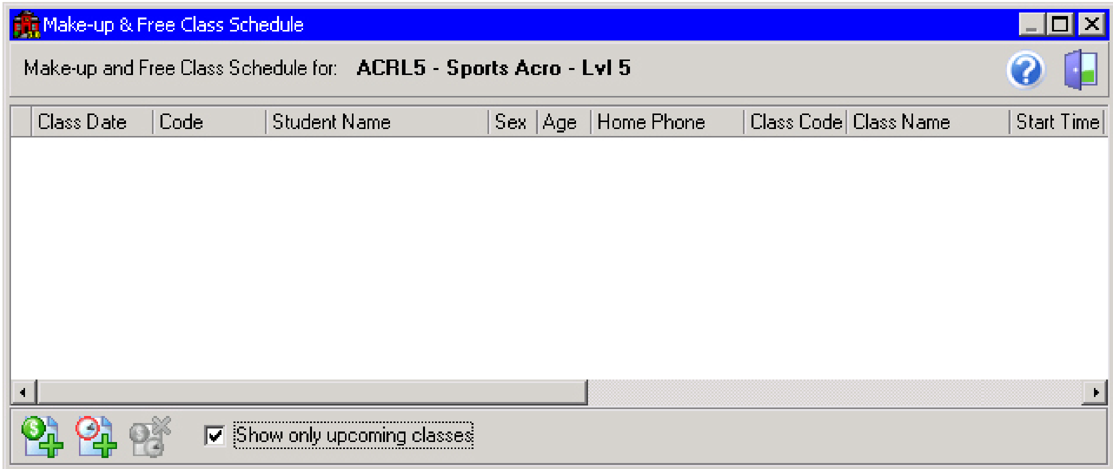


4. Select the class to which you want to add the Student and click OK to do so.

Enrolling Students and Making Enrollment Changes

-continued-

5a. To show all Students who have been scheduled for a make-up or free class session for the class currently shown in the **Class List** section, click  to open the **Make-up & Free Class Schedule** window:

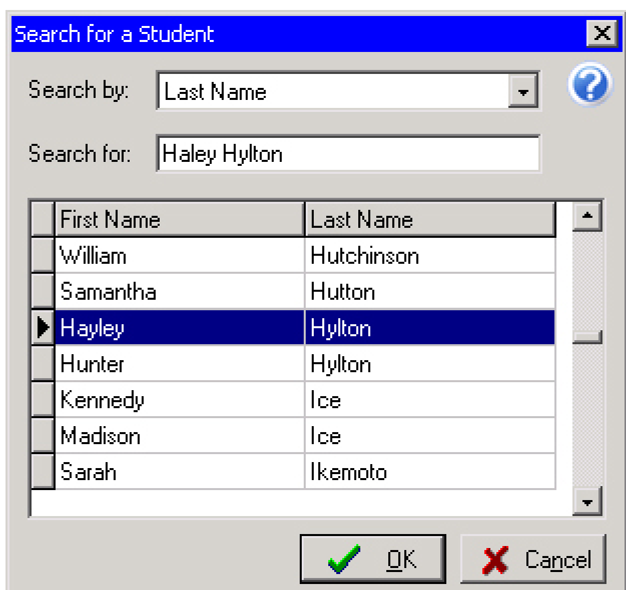


In the above example, no Students have yet been scheduled for a make-up or free class session for this class (ACRL5 - Sports Acro - Lvl 5). The first two buttons at the bottom of this window will allow us to do so, as follows (the third we'll get to in a moment):

- **add a Student to a *make-up session*** of this class (i.e., you are scheduling them to attend a future regularly-scheduled session of this class for the purpose of making up a previous session of this class—or similar class—that they missed).

- **add a Student to a *free session*** of this class (i.e., you are allowing a Student to attend a class without charge, as way of letting them try out the class, or other reason).

5b. To schedule *any* Student in your school for a make-up or free class session for this class (as above), click on either of the above buttons to open the **Search for a Student** window:



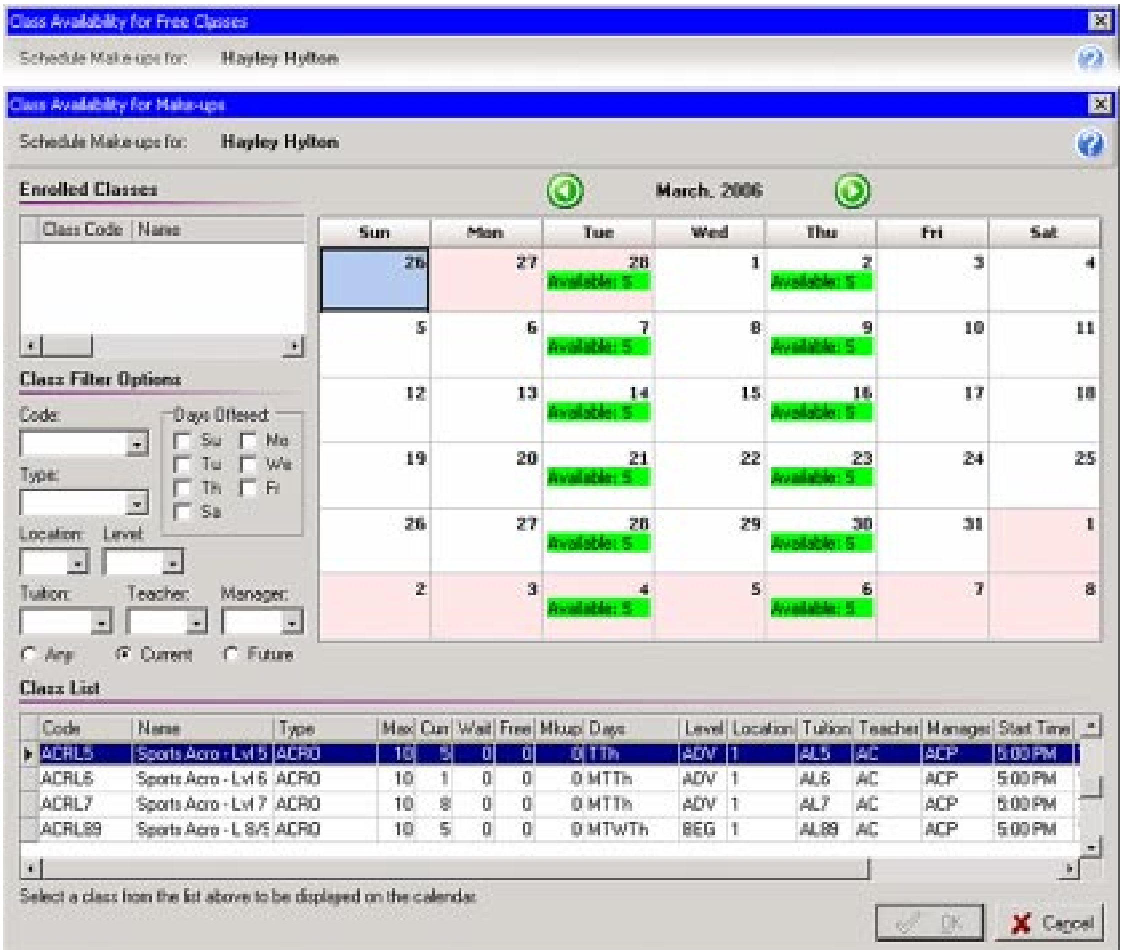
Enrolling Students and Making Enrollment Changes

-continued-

5c. You can search by scrolling down through the list of names, or by selecting from among the search criteria in the **Search by:** pull-down menu, they typing the appropriate information in the **Search for:** field. As you do, all Student names matching your criteria will appear in the lower section.

5d. Select the Student you wish to add to the previously selected class. Then, click 

to open the **Class Availability for Free Classes** OR **Class Availability for Make-up Classes** window (determined by which option you originally chose):



Note that both windows function identically, and are identical in appearance except for the window titles.

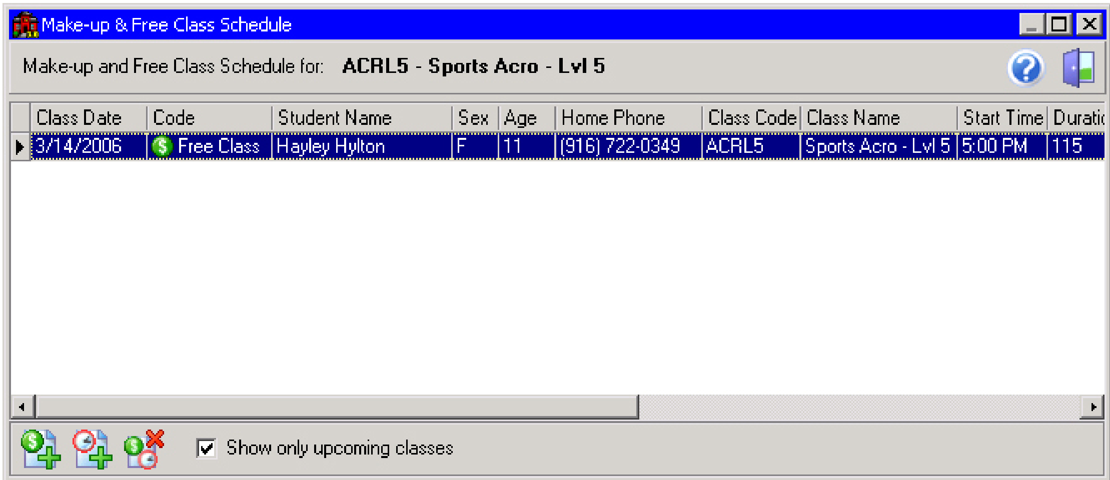
This window gives you a calendar-based view of which classes can accommodate free and make-up Students, and *how many* Students can be accommodated in each class session.

Note that the class that is selected by default is the one you originally had selected in the Class List area of the Class Information view you started in. However, this window gives you the flexibility to assign the selected Student a free and / or make-up class session for *any* class in your School (provided there is room, i.e., the specific session isn't full).

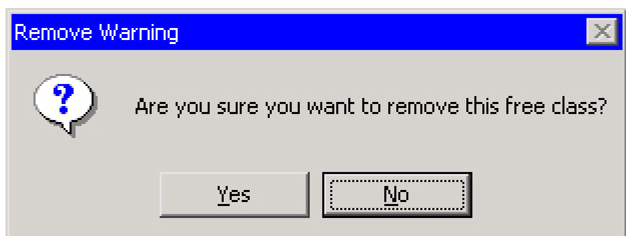
Enrolling Students and Making Enrollment Changes

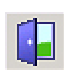
-continued-

5e. Click on the free or make-up class session you want to add the Student to, then click  to add them. The **Make-up & Free Class Schedule** window will again appear, but now it displays the Student you've just scheduled a free or make-up session for:



5f. If you want to *remove* a Student from a scheduled free or make-up class, select their name and click  to remove them. A confirmation dialog will appear:



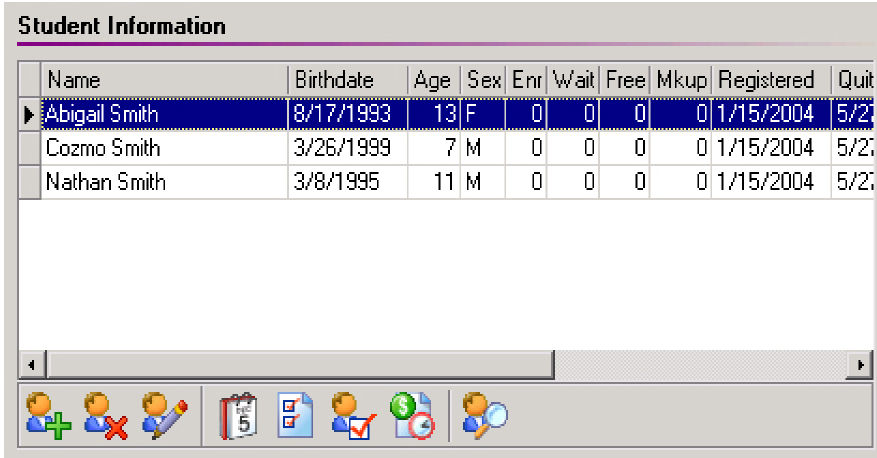
5g. Click  to save the changes (or  to abandon the changes and close the window). You are returned to the **Make-up & Free Class Schedule** window. When done, click **X** or  to close the window and return to the **Class Information** view in the main ProSchool window.

There may be times when you're in the **Family Information** window and want to add a Student to a Free or Make-up class. It isn't necessary to navigate back to the **Class Information** window to do so.

Enrolling Students and Making Enrollment Changes

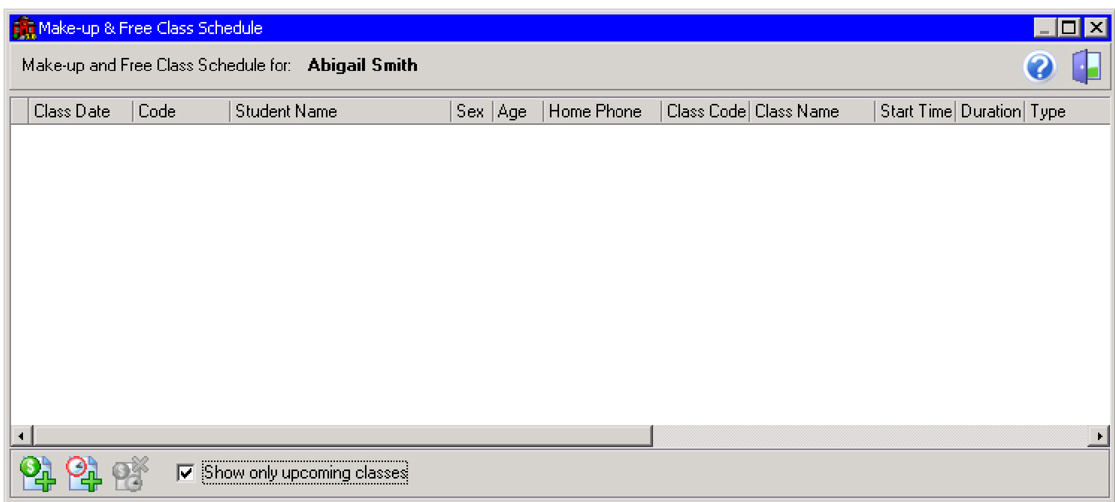
-continued-

We'll assume your are currently in the **Family Information** window. Let's focus on the **Student Information** section:



To schedule Students in Make-up or Free classes from the Student Information section of the Family Information window:

1. Click  to open the **Make-up & Free Class Schedule** window:



This window was discussed in the previous section, so it should look familiar. At this point, the procedure is exactly the same as described in the previous section starting with step #5d.

Using ProSchool's Context-Sensitive Search Functions

CONDUCTING CLIENT AND STUDENT SEARCHES IN PROSCHOOL

ProSchool's context-sensitive search function offers you a quick, easy and powerful way to search for Clients and Students in the **Family Information** window via the following buttons, which are located on the window's button bar (top left area).

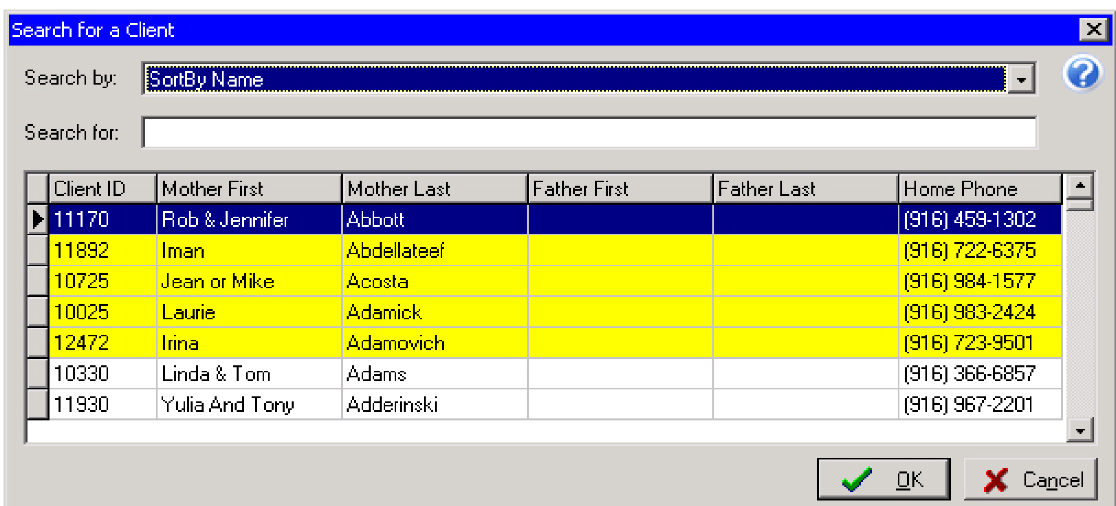

- opens the **Search for a Client** window, where you can specify the search parameters (Client ID number, first or last name of mother / father / Student, phone number, etc.);


- opens the **Find a Client** window, where you can initiate a search based on name (exact match, partial match at the beginning, or partial match anywhere)—a handy tool when you can't remember the exact name or correct spelling of the name you're searching for.

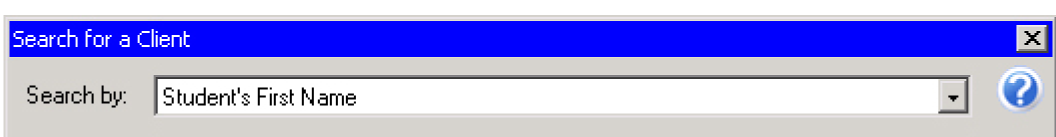

- finds the next result matching the criteria established in the **Find a Client** window (this button is inactive, i.e. grayed out, when there is no current search being undertaken in the **Find a Client** window).


To conduct a search in the Family Information window using the "Search For A Client" button:

1. To search by Client ID, Client or Student name, or phone number, click  to open the **Search for a Client** window:



2. In the **Search by:** field, select the criteria you wish to use in the search. For example, suppose you need to enter some additional information for a new Student whose last name you cannot remember, but whose first you do—"Kate". Click the down arrow at the right end of the **Search by:** field, and select **Student's First Name**.

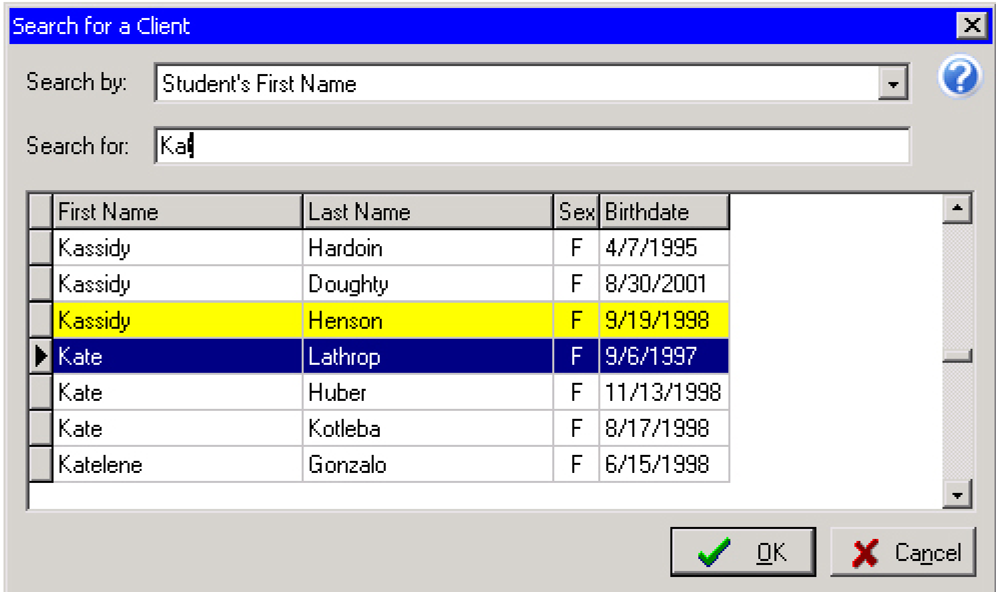


3. Enter the Student's first name in the **Search for:** field. As you enter the characters of the name, the name listings in the pane immediately below will scroll in response.

Using ProSchool's Context-Sensitive Search Functions

-continued-

When you finish inputting the name, the first instance of a Student with the “first” name you entered will be highlighted:



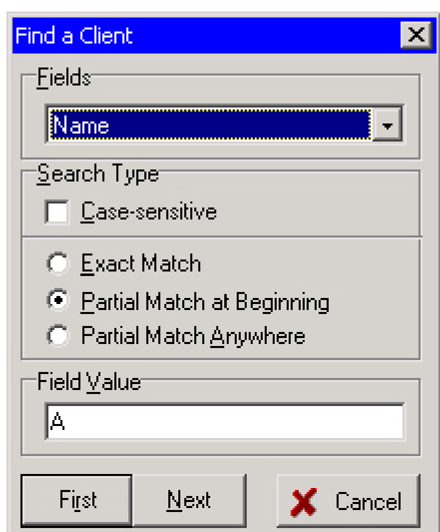
Note that the input “Kat” brings up Kate Lathrop.

4. Make sure the Client or Student name you want is highlighted, then click 

to return to the **Family Information** window, where Kate and her Family will now be the selected family (note the client's name in the **Family Information** section in the upper left area of the window).

 **To conduct a search in the Family Information window using the “Find A Client” button:**

1. Click  (or **F2** on the keyboard open the **Search for a Client** window:



2. In the **Fields** section, use the drop-down menu to select the search criterion you wish to use in your Client search. Your options include all of the data field categories in the **Client Information** window.

Using ProSchool's Context-Sensitive Search Functions

-continued-

3. In the **Search Type** section, select **Case-sensitive** if you want ProSchool to consider text case in its search.

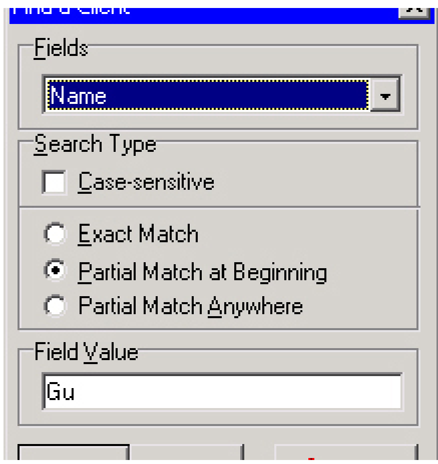
4. In the **Search Type** section, select the degree of specificity you want ProSchool to use in its search based upon the alphanumeric data you will enter in **Field Value:** (step #5):

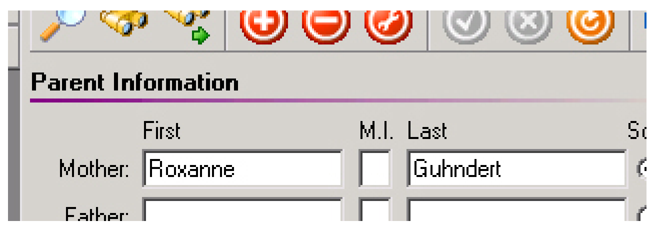
- **Exact Match** returns only the Client name, or names, whose data matches the **Field Value:** exactly (including case, if you selected **Case-sensitive**);
- **Partial Match at Beginning** returns only the Client name, or names, whose data matches the **Field Value:** exactly at the *beginning* of the field data ("Jo" returns "Jones", "Johnstone", "Joseph", etc.);
- **Partial Match Anywhere** returns only the Client name, or names, whose data matches the **Field Value:** exactly but occurs *anywhere* within the field data string ("er" returns "Berger", "Ernst", "Roemer" and "Vernon" if case sensitivity is *un*selected—but of the four would not return "Ernst" if case sensitivity had been selected).

5. In **Field Value:**, enter the alphanumeric string (full or partial word or name, numeric data, etc.) you want ProSchool to use in its search.

6. Click **First** to initiate the search. The first name meeting your search criteria will be highlighted in the **Clients:** section of the **Client Information** window.

For example, configuring the **Find a Client** window to look for a Client whose last name begins specifically with "Gu" (below, left), would return the following results (below, right):





7. If you want ProSchool to return another name matching your search criteria, click  (or **F3** on the keyboard). The second name meeting the criteria will then appear in the **Parent Information** section.

Using ProSchool's Context-Sensitive Search Functions

-continued-

8. You can continue this process as long as you wish (or click  at any point to reconfigure your search criteria); ProSchool will let you know when it exhausts all the possibilities based on your search criteria:

9. Click **OK** to return to the **Client Information** window.

Using ProSchool's Context-Sensitive Search Functions

-continued-

CONDUCTING CLASS SEARCHES IN PROSCHOOL

As with client searches, ProSchool's context-sensitive search function offers you a quick, easy and powerful way to search for classes in the **Class Information** window. It's done using the following buttons, which are located on the window's button bar (top left area).

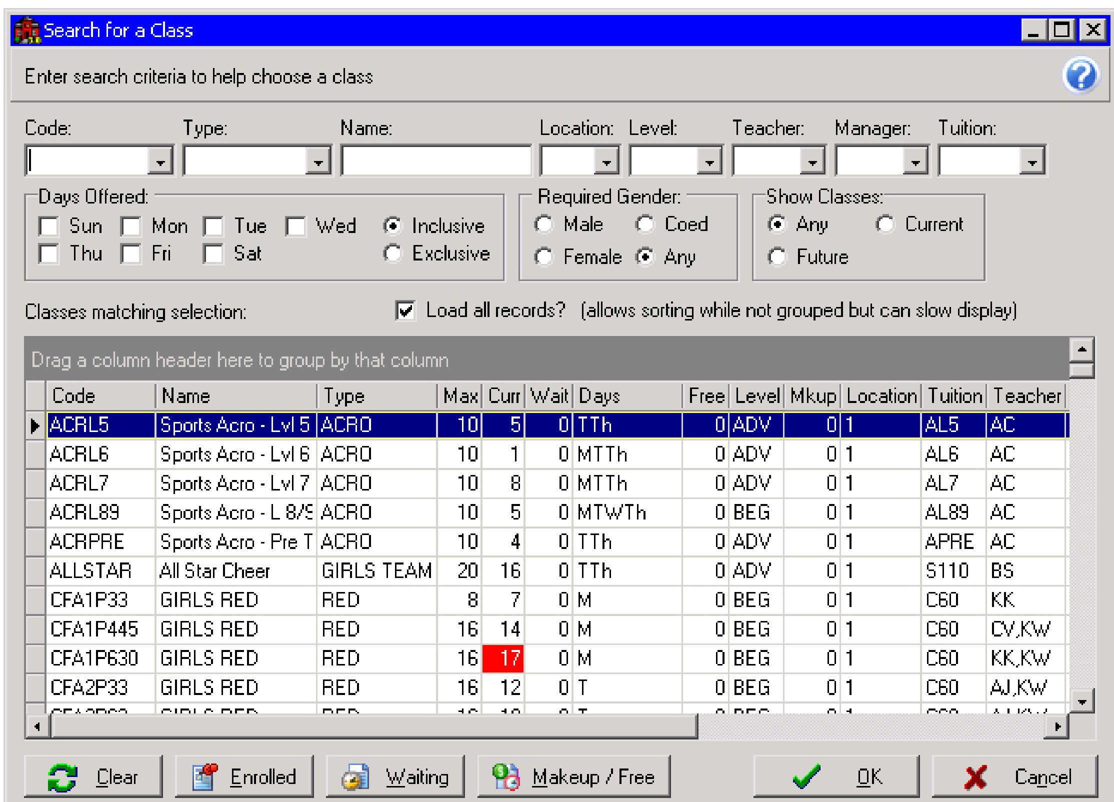
 - opens the **Search for a Class** window, where you can specify the search parameters;

 - opens the **Select Filter Criteria** window, where you can configure the search parameters ("filters") thus tightening up the search;

 - disables the filters and shows *all* your school's classes in the **Class List** section of the **Class Information** window (this button is inactive, i.e. grayed out, when no filtered search is active).

 **To conduct a search in the Class Information window using the "Search for a Class" button:**

1. Click  to open the **Search for a Class** window:



This window should look familiar to you by now. Except for the screen title, it's exactly the same as the **Choose A Class For...** screen that is explained on page 164 in the earlier section entitled, "Enrolling Students From The Family Information Screen".

Using ProSchool's Context-Sensitive Search Functions

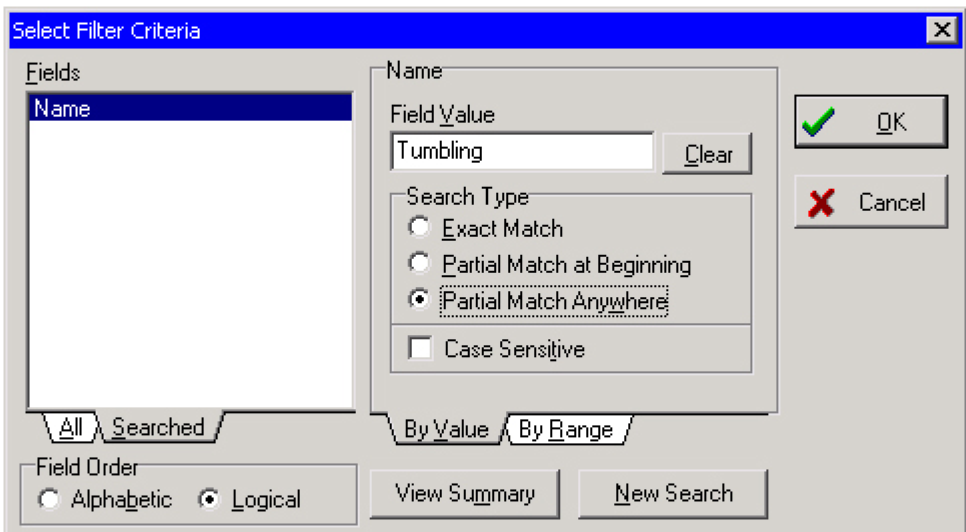
2. Enter the appropriate information to arrive at the class you want, view enrolled and waiting lists for a given class, etc., then click through the OK buttons (as applicable) to return to the **Class Information** window.

Hint: If you have a large Client, Student and class database, the now-familiar **Search for a Class** *approach (described above) may not give you the degree of specificity you will sometimes need for those "needle in a haystack"-type searches. The* **Select Filter Criteria** *search tool is ideal for exacting searches because it gives you the ability to configure tighter search parameters—and that makes it easy to return highly specific results.*

-continued-

To conduct a class search in the Class Information window using the "Filter Classes" button:

1. Click  to open the **Filter Classes** window:



Note that the **Field** menu list can be arranged either alphabetically or logically. You can change the order by selecting the appropriate button in the **Field Order** section (underneath the **Field** listings); **Logical** is the default.

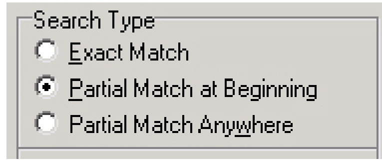
2. Select a field. The field type you choose defines your first (or only) search criterion. You can select from 40+ field types, and the **By Value** and **By Range** options are contextual so they will change to suit the field type chosen.

3a. To search based on an alphanumeric value (letters, numbers or both), click the **By Value** tab and enter the alphanumeric value in the **Field Value** field.

Using ProSchool's Context-Sensitive Search Functions

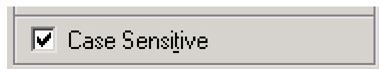
-continued-

3b. In the **Search Type** section, choose how tightly you want to filter the results:



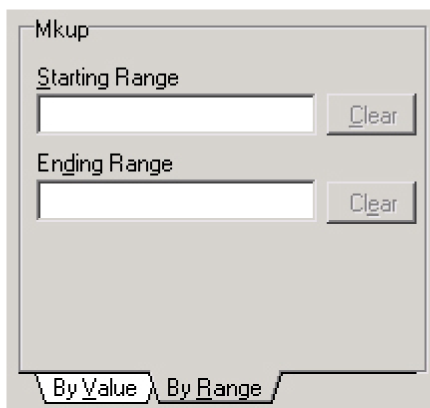
- The **Exact Match** option would match the value exactly (the value "Jones" would return the result "Jones" exactly);
- The **Partial Match at Beginning** option would match the value partially at the beginning (the value "Jo" would return "Johnson", "Jones", "Joplin", etc.);
- The **Partial Match Anywhere** option would match the value partially anywhere in the string (the value "es" would return "Essinger", "Lourdes", "Nessman", etc.).

3c. Click the **Case Sensitive** check box if you want to activate the case-sensitive filter to force search results to match the upper/lower case attributes of the field value exactly:



This can be useful, for example, if you are searching for a Class name but only remember the first two letters, such as "As". By activating the case-sensitive filter, the search will return only those names containing exactly that string—an upper case "A" and lowercase "s". Otherwise, the search results will return all names containing the string "as", regardless of case or where the string occurs in the name.

4. If you want to return values that fall only within a specified range, you can do so by specifying the starting and ending values which are accessed by clicking on the **By Range** tab:

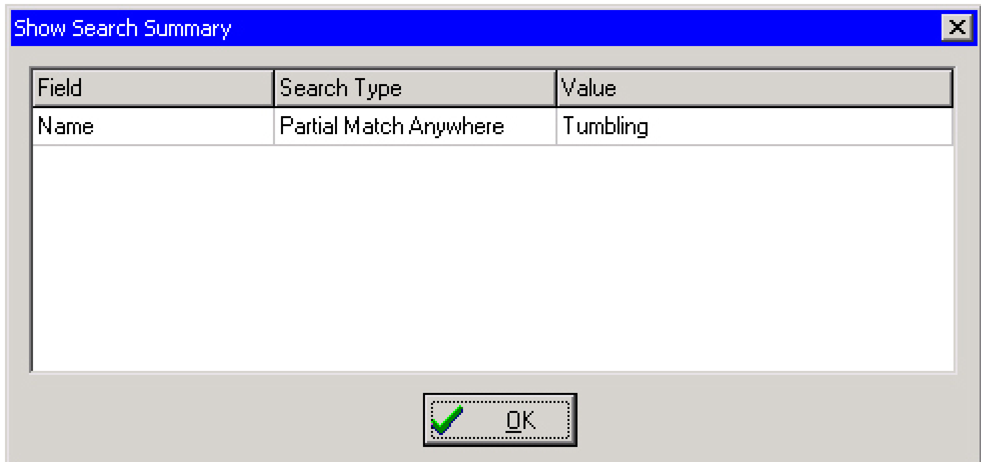


The range configuration varies depending on the type of field (names, numbers, etc.) but all types allow a range-specific search.

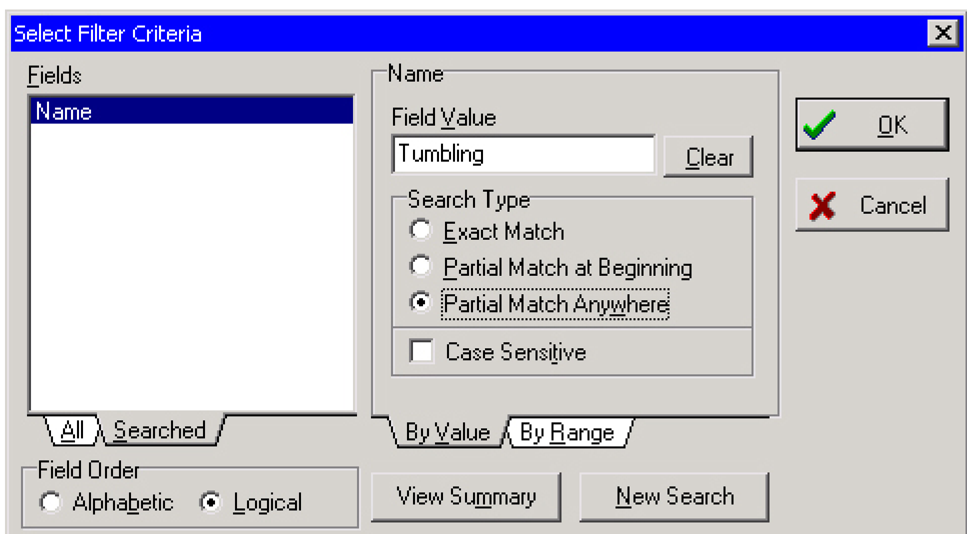
Using ProSchool's Context-Sensitive Search Functions

-continued-

5. To view all search parameters at a glance—including the values you've entered—click on **View Summary** (though they are not editable in this window):



6. A concise listing of all configured fields (i.e. only those which you have entered parameters for) can be viewed by clicking the **Searched** tab of the **Fields** section, then clicking either the **By Value** or **By Range** tab:



Note that you can configure as many filter criteria ("fields") as you need to. Herein lies the power of ProSchool filtered search: you can narrow searches as precisely as you need to.

7. When you are finished configuring the filter(s), click 

to close the **Select Filter Criteria** window and populate the **Class List** section of the **Class Information** view with the classes that meet your filtered search criteria.

8. If you want to repopulate the **Class List** section with *all* your school's classes (i.e., totally unfiltered results), click  to disable the filter(s) you have configured.

9. You can configure another filtered search at any time by clicking  to open the **Select Filter Criteria** window; click **New Search** to delete existing filter parameters and start fresh.

Using ProSchool's Enrollment Utilities

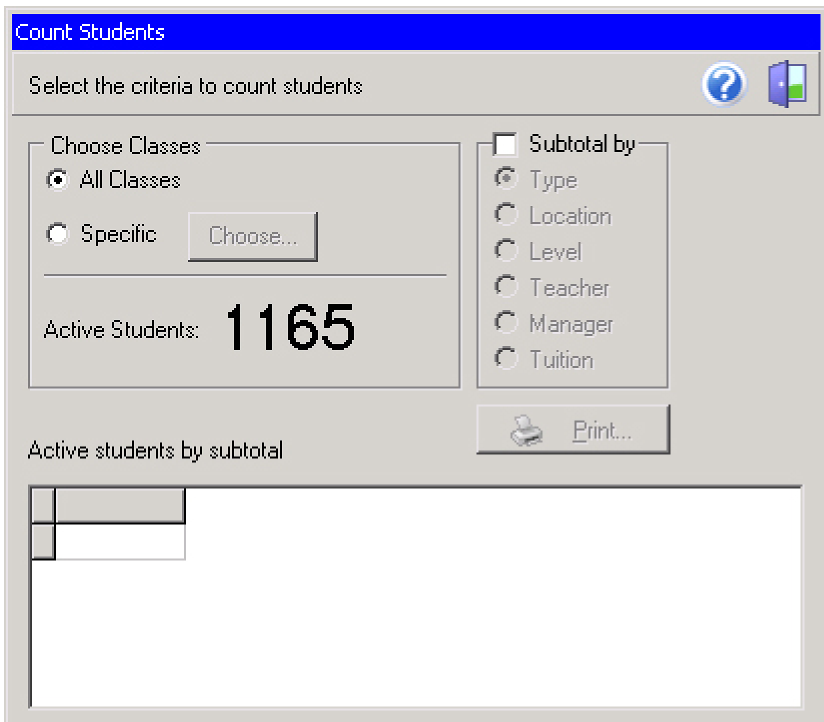
USING THE "COUNT STUDENTS" UTILITY

ProSchool offers you a simple way to determine how many Students you have actively enrolled in your School. The Student count can be configured in one of several ways:

- the *total* number of actively enrolled Students enrolled in your School (non-class-specific);
- the total number of actively enrolled Students in a *specific class*;
- the total number of Students, class-specific or not, *by any one of several categories* (type, locations, level, teacher, manager or tuition).

To tally the number of Students in your school:

1. Click on the **Utilities** pull-down menu on the main menu bar and select **Count Students**. The **Count Students** window appears, displaying the total number of Students currently enrolled in your School:



2. To return a count based on a specific range of classes, select **Specific** in the **Choose Classes** section, then click on the un-grayed **Choose...** button to open the **Search for a Class** window (discussed in detail in the previous sections).

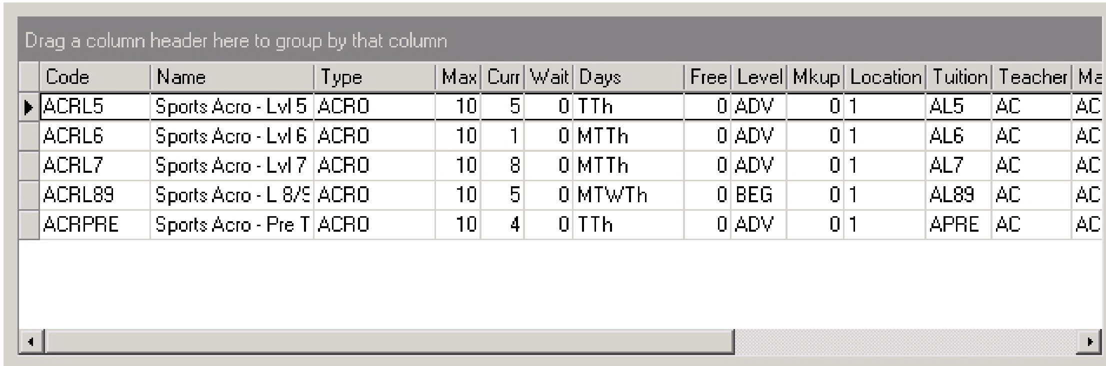
3. In the **Search for a Class** window, define the range of classes you want included in the count by entering the appropriate information (**Code:**, **Type:**, **Name:**, **Location:**, **Level:**, **Teacher:**, **Manager:**, **Tuition:**, **Days Offered:**, **Required Gender:** and **Show Classes:**).

Hint: To create a unique subset (group) of classes of your choosing without configuring any of the above criteria, first make sure all classes are displayed in the **Classes matching selection:** *section by leaving the above criteria blank (use the* **Clear Criteria** *button to clear the fields). Then build your subset by holding down the* **CONTROL** *key while clicking on the specific classes you want. When you are done with your class selections, click* **OK**.

Using ProSchool's Enrollment Utilities

-continued-

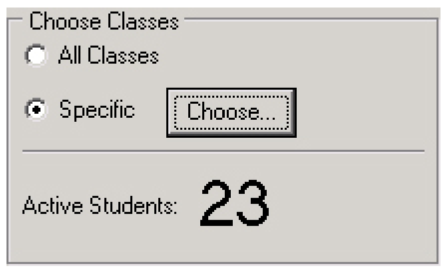
The classes that satisfy your criteria will be displayed in the **Classes matching selection:** section. These are the *only* classes that will be included in the count:



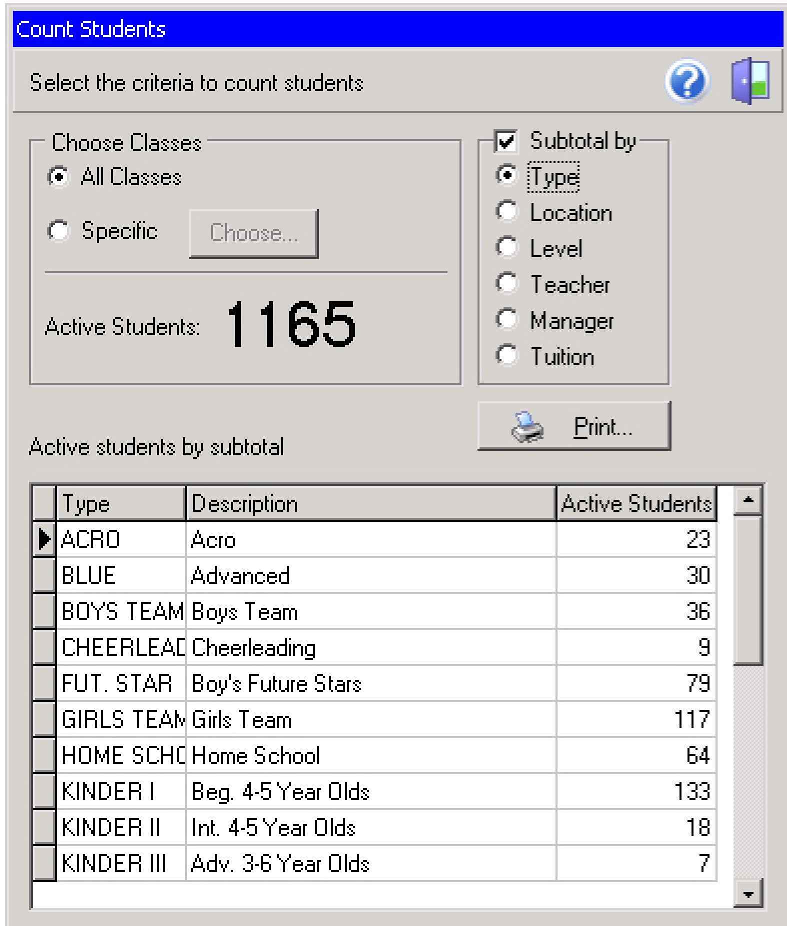
Drag a column header here to group by that column

Code	Name	Type	Max	Curr	Wait	Days	Free	Level	Mkup	Location	Tuition	Teacher	Ma
ACRL5	Sports Acro - Lvl 5	ACRO	10	5	0	TTh	0	ADV	0	1	AL5	AC	AC
ACRL6	Sports Acro - Lvl 6	ACRO	10	1	0	MTTh	0	ADV	0	1	AL6	AC	AC
ACRL7	Sports Acro - Lvl 7	ACRO	10	8	0	MTTh	0	ADV	0	1	AL7	AC	AC
ACRL89	Sports Acro - L 8/9	ACRO	10	5	0	MTWTh	0	BEG	0	1	AL89	AC	AC
ACRPRE	Sports Acro - Pre T	ACRO	10	4	0	TTh	0	ADV	0	1	APRE	AC	AC

4. When you are done selecting your Student count parameters, click OK to return to the **Count Students** window (or click **Cancel** to return without making a selection). Based on your class search resulting in subset of the classes shown above, the **Active Students:** display now reads 23:



5. If you want to subtotal your Student counts using any of the six categories (Type, Location, Level, Teacher, Manager or Tuition), select your choice in the **Subtotal by** window; the subtotals will then appear in the **Active students by subtotal** section:



Note that the number of "active students" (1,165 in the above example) can be less than the total of students in the **Active Students** column (which is quite long in this example, given the size of the scroll bar!). This is because the Active Students column reflects the subtotals for each class type, which often includes the same Student taking multiple classes.

6. To print the results, click the **Print...** button.

Using ProSchool's Enrollment Utilities

-continued-

TAKING ENROLLMENT SNAPSHOTS

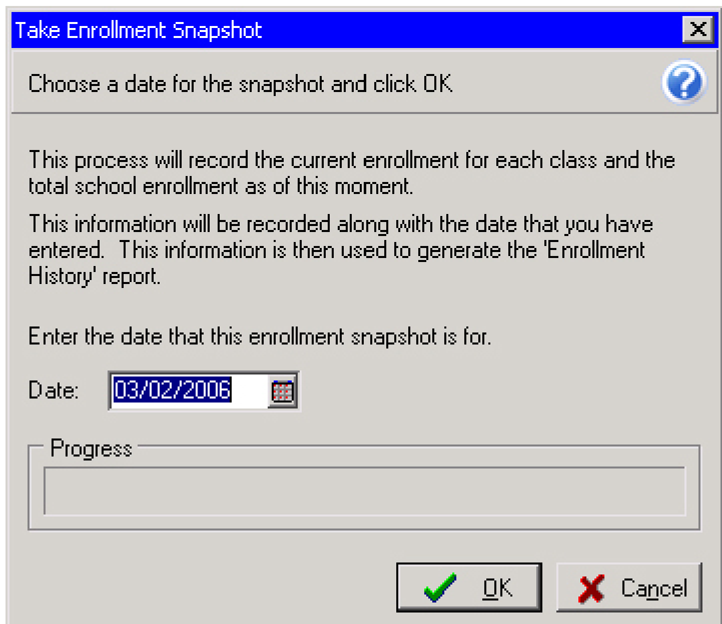
ProSchool offers you a way to record a profile or "snapshot" of your school's total enrollment at any point in time. This is a valuable tool if used on a regular basis because it allows you a quick and conclusive way of "looking back" into the past if you ever need to research enrollment history for your school.

When ProSchool takes a snapshot of your school, it records the following information:

- enrollment data for each class, including the number of Students enrolled *by class*;
- aggregate enrollment data for the entire school.

To take an enrollment snapshot of your school:

1. Click on the **Utilities** pull-down menu on the main menu bar and select **Enrollment Snapshots / Take Snapshot**. The **Take Enrollment Snapshot** window appears:



2. Select the date you want to record, then click **OK** (or **Cancel** to exit this window). The Progress gauge indicates the percentage of completion.

Hint: Note that reports can be backdated. This is useful, for example, if you normally take a snapshot every Friday but forgot to do so one week, then realized your error the following Monday. Simply use that Friday's date and you will still get a snapshot dated Friday. (It will be accurate provided no enrollment changes have been made since then).

3. To print out a report of all snapshots taken within a specified date range, see the later chapter entitled, "Generating Reports In ProSchool".

Using ProSchool's Enrollment Utilities

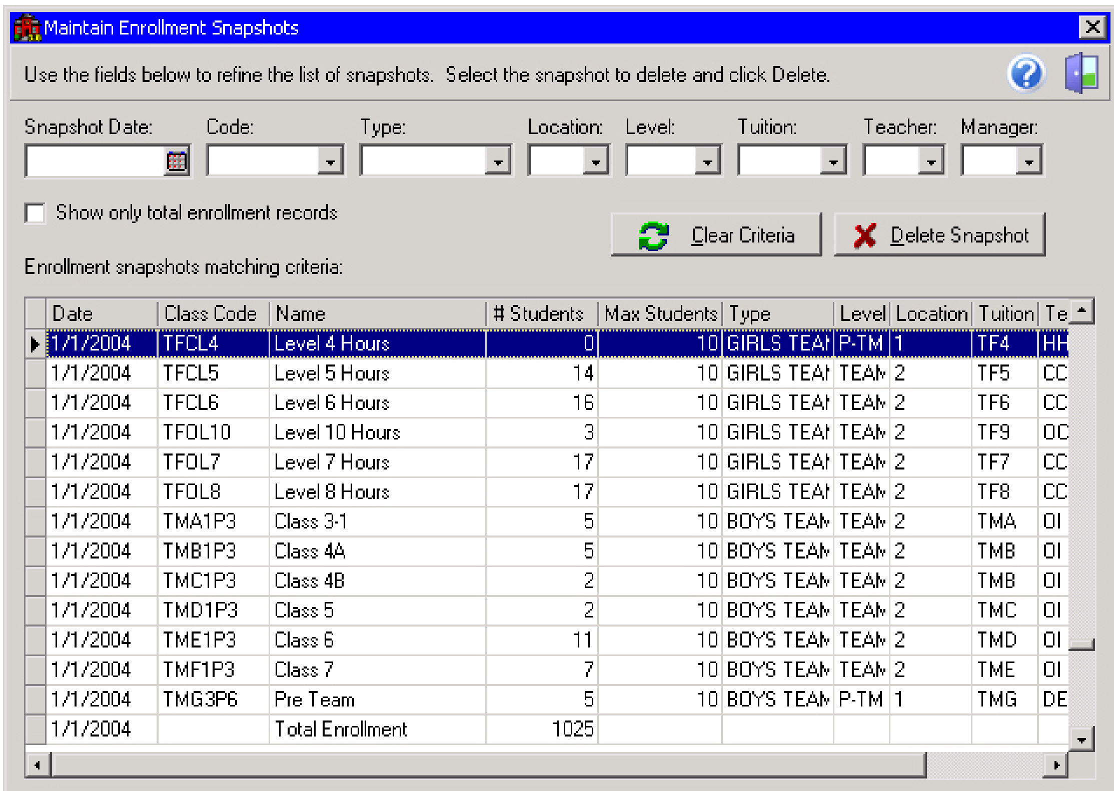
-continued-

■ MAINTAINING YOUR SNAPSHOT FILE

ProSchool offers you a way to maintain your file of enrollment snapshots. This allows you to view snapshots by category, then delete those you don't need.

To modify your snapshot files:

1. Click on the **Utilities** pull-down menu on the main menu bar and select **Enrollment Snapshots** / **Maintain Snapshots**. The **Maintain Enrollment Snapshots** window appears:



Date	Class Code	Name	# Students	Max Students	Type	Level	Location	Tuition	Te
1/1/2004	TFCL4	Level 4 Hours	0	10	GIRLS TEAI	P-TM	1	TF4	HH
1/1/2004	TFCL5	Level 5 Hours	14	10	GIRLS TEAI	TEAM	2	TF5	CC
1/1/2004	TFCL6	Level 6 Hours	16	10	GIRLS TEAI	TEAM	2	TF6	CC
1/1/2004	TFOL10	Level 10 Hours	3	10	GIRLS TEAI	TEAM	2	TF9	OC
1/1/2004	TFOL7	Level 7 Hours	17	10	GIRLS TEAI	TEAM	2	TF7	CC
1/1/2004	TFOL8	Level 8 Hours	17	10	GIRLS TEAI	TEAM	2	TF8	CC
1/1/2004	TMA1P3	Class 3-1	5	10	BOYS TEAM	TEAM	2	TMA	OI
1/1/2004	TMB1P3	Class 4A	5	10	BOYS TEAM	TEAM	2	TMB	OI
1/1/2004	TMC1P3	Class 4B	2	10	BOYS TEAM	TEAM	2	TMB	OI
1/1/2004	TMD1P3	Class 5	2	10	BOYS TEAM	TEAM	2	TMC	OI
1/1/2004	TME1P3	Class 6	11	10	BOYS TEAM	TEAM	2	TMD	OI
1/1/2004	TMF1P3	Class 7	7	10	BOYS TEAM	TEAM	2	TME	OI
1/1/2004	TMG3P6	Pre Team	5	10	BOYS TEAM	P-TM	1	TMG	DE
1/1/2004		Total Enrollment	1025						

Each snapshot is a comprehensive look at your school's enrollment on a given date and actually consists of multiple components:

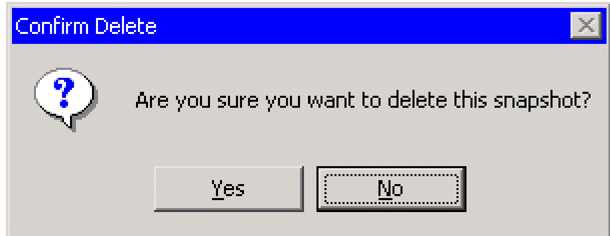
- a detailed entry for each class offered by your school (whether or not any Students are currently enrolled in a given class), and;
- an entry listing the total enrollment for your school.

As shown in the window above, the class entries appear in the **Enrollment Snapshots matching criteria:** section in alphabetical order by class code. The window has been expanded beyond its original size to show the last of the entries for 1/1/2004 (the total list of snapshots for all the classes on this date is far longer than the window can show, even if the window were to be expanded vertically; this is due to the large lumber of classes in our sample school). Also, note the "Total Enrollment" entry for this date's snapshots will always appear as the last entry for this date, as it does above.

Using ProSchool's Enrollment Utilities

-continued-

2. To delete an entry, select a snapshot you want to delete and click **Delete Snapshot**. A dialog box will confirm your choice:



Hint: If you have several snapshots to delete and want to speed up the deletion process, use the **CONTROL** + **DELETE** *key combination. Doing so will delete the selected entry without bringing up the confirmation box each time you do so.*

3. To narrow the display to only those snapshots that meet certain criteria, enter the appropriate information in any or all of the **Code:**, **Type:**, **Location:**, **Level:**, **Tuition:**, **Teacher:** and **Manager:** fields. ProSchool then updates the display accordingly.

For example, the following window shows only the classes that fit the "ACR1P5" class code:

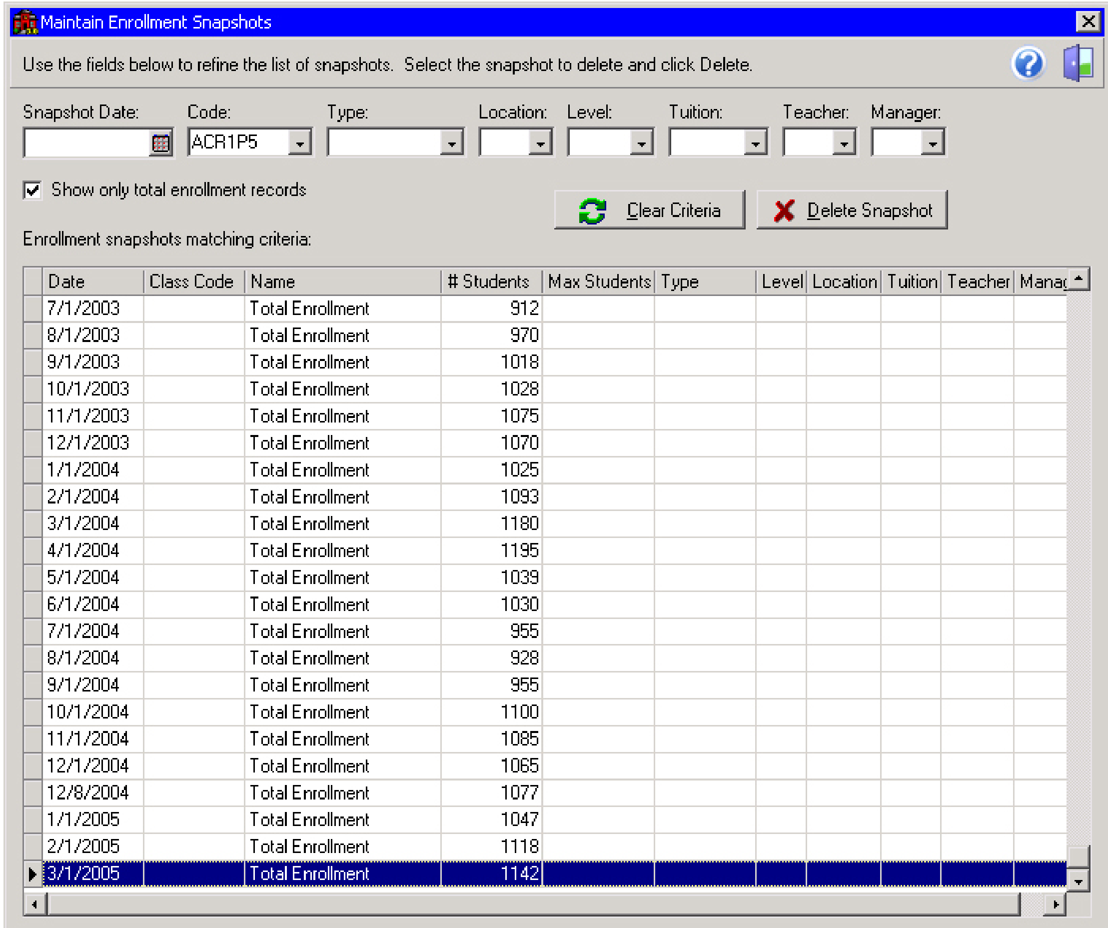
Date	Class Code	Name	# Students	Max Students	Type	Level	Location	Tuition	Te
10/1/2002	ACR1P5	Sports Acro - Beg	2	8	ACRO	BEG	1	C90	AC
11/1/2002	ACR1P5	Sports Acro - Beg	5	8	ACRO	BEG	1	C90	AC
12/1/2002	ACR1P5	Sports Acro - Beg	6	8	ACRO	BEG	1	C90	AC
1/1/2003	ACR1P5	Sports Acro - Beg	6	8	ACRO	BEG	1	C90	AC
2/1/2003	ACR1P5	Sports Acro - Beg	1	8	KINDER I	BEG	1	C90	KS
3/1/2003	ACR1P5	Sports Acro - Beg	0	8	ACRO	BEG	1	C90	AC
4/1/2003	ACR1P5	Sports Acro - Beg	0	8	ACRO	BEG	1	C90	AC
5/1/2003	ACR1P5	Sports Acro - Beg	0	8	ACRO	BEG	1	C60	AC
6/1/2003	ACR1P5	Sports Acro - Beg	6	8	ACRO	BEG	1	C60	AC
7/1/2003	ACR1P5	Sports Acro - Beg	7	10	ACRO	BEG	1	C60	AC
8/1/2003	ACR1P5	Sports Acro - Beg	7	10	ACRO	BEG	1	A60	AC
9/1/2003	ACR1P5	Sports Acro - Beg	6	10	ACRO	BEG	1	A60	AC
10/1/2003	ACR1P53	Sports Acro - Lvl 5	2	12	ACRO	ADV	1	AL5	AC
10/1/2003	ACR1P530	Sports Acro - Lvl 6	10	12	ACRO	ADV	1	AL6	AC
11/1/2003	ACR1P53	Sports Acro - Lvl 5	2	12	ACRO	ADV	1	AL5	AC
11/1/2003	ACR1P530	Sports Acro - Lvl 6	9	12	ACRO	ADV	1	AL6	AC

To clear fields for a new search, click the **Clear Criteria** button.

Using ProSchool's Enrollment Utilities

-continued-

4. To view only the "Total Enrollment" entries for all snapshot dates, select the **Show only total enrollment records** option. The results would appear as follows:



Date	Class Code	Name	# Students	Max Students	Type	Level	Location	Tuition	Teacher	Manag
7/1/2003		Total Enrollment	912							
8/1/2003		Total Enrollment	970							
9/1/2003		Total Enrollment	1018							
10/1/2003		Total Enrollment	1028							
11/1/2003		Total Enrollment	1075							
12/1/2003		Total Enrollment	1070							
1/1/2004		Total Enrollment	1025							
2/1/2004		Total Enrollment	1093							
3/1/2004		Total Enrollment	1180							
4/1/2004		Total Enrollment	1195							
5/1/2004		Total Enrollment	1039							
6/1/2004		Total Enrollment	1030							
7/1/2004		Total Enrollment	955							
8/1/2004		Total Enrollment	928							
9/1/2004		Total Enrollment	955							
10/1/2004		Total Enrollment	1100							
11/1/2004		Total Enrollment	1085							
12/1/2004		Total Enrollment	1065							
12/8/2004		Total Enrollment	1077							
1/1/2005		Total Enrollment	1047							
2/1/2005		Total Enrollment	1118							
3/1/2005		Total Enrollment	1142							

Note that doing so overrides the entered criteria ("ACR1P5" in this example). If you *un*selected the **Show only total enrollment records** option at this point, the display of snapshots would update to correspond to the criteria you entered in the upper fields.

Using ProSchool's Enrollment Utilities

-continued-

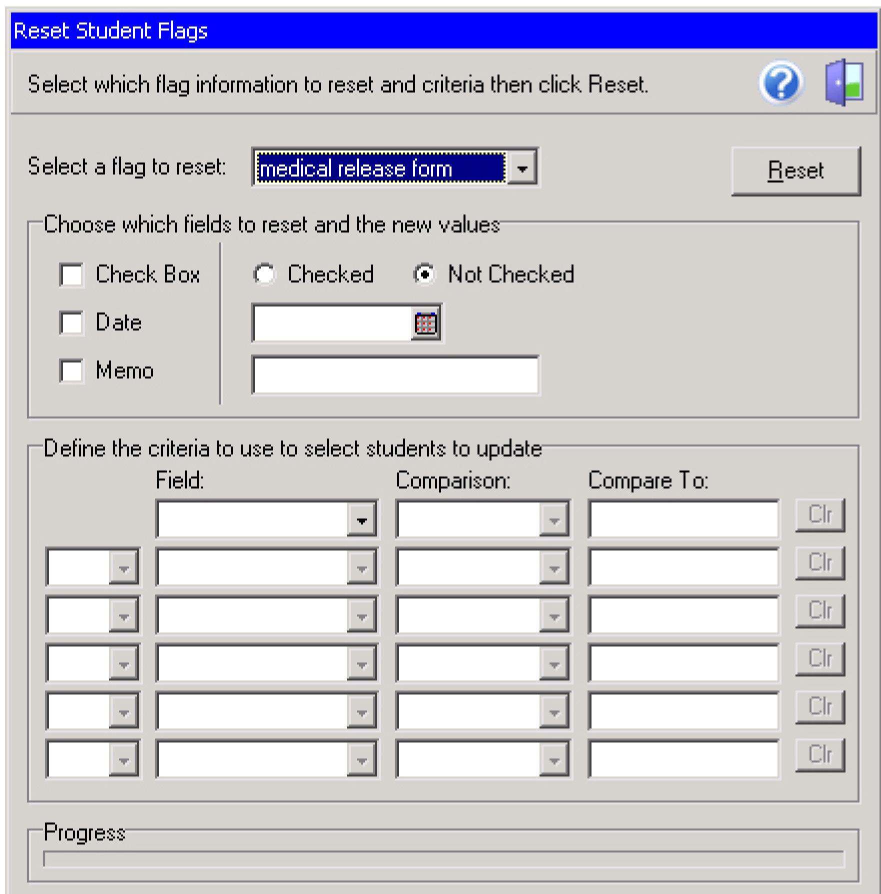
RESETTING STUDENT FLAGS

ProSchool provides a utility for quickly resetting Student Flags. This way, you can easily do a global reset for any Student flag that is common to many or all of your Students. For example, at the start of a new school year, you may wish to reset the "bus #/ arrival time?" flag so that old information doesn't remain in the system to confuse the issue. This way, a blank field makes it most obvious that a Student's record requires new information.

To reset ProSchool's Student flags, you simply enter the flag description and the "condition" you want the fields reset to.

To reset Student Flags:

1. Click on the **Utilities** pull-down menu on the main menu bar and select **Reset Student Flags**. The window opens:



2. In the **Select a flag to reset:** field, click on the down-arrow and select the appropriate flag.

3. In the **Choose which fields to reset and the new values** section, indicate the fields to reset (**Check Box**, **Date** or **Memo**), and the new values or conditions you want them to display (if any).

4. To select which Students whose flags to reset using a more exacting means, enter the appropriate information in the **Define the criteria to use to select students to update** section (see the previous section, "Using ProSchool's Context-Sensitive Search Function"), for detailed information on how to set up this type of search.

5. To initiate the reset process, click the **Reset** button. ProSchool will reset all Student flags that meet your entered criteria (as indicated on the **Progress** gauge).

Getting Started With ProSchool's Ledger

THE "BIG PICTURE": UNDERSTANDING PROSCHOOL'S ACCOUNT LEDGER

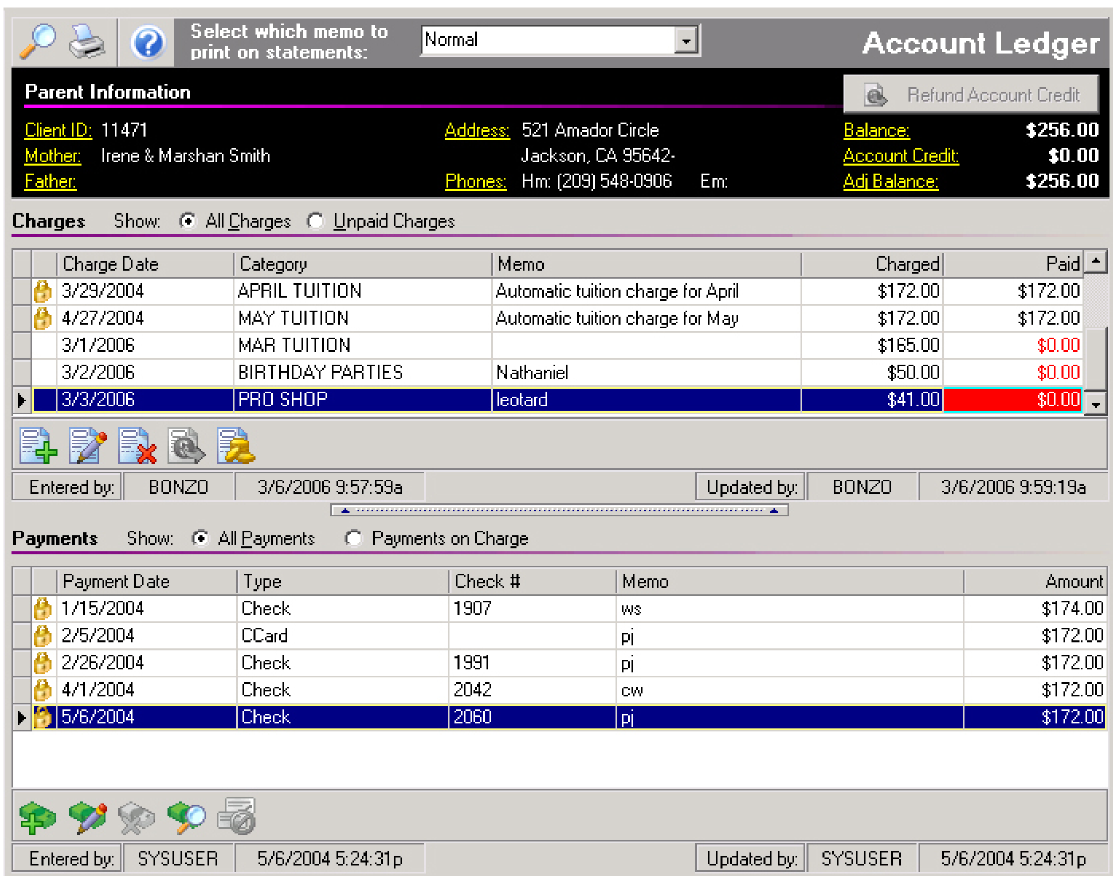
ProSchool's Account Ledger offers a comprehensive "bird's eye view" of a Client's account. Here, at a glance, you can view:

- paid *and* unpaid charges against the account;
- charge and payment history;
- account balance (charges vs. applied payments, regardless of credits);
- total amount of any account credit(s), if any;
- the "bottom line"—the Client's *adjusted* account balance (charges vs. applied payments *less* any credit).

From the **Account Ledger** window, you can:

- view all charges for a given Client, *both* paid and unpaid;
- view all payments made on account for a given Client;
- view, modify (edit details) or delete unpaid charges;
- view, modify (edit details), or delete payments;
- enter new charges and / or payments.

The window with all the above capabilities is an intuitive, easy-to-use format:

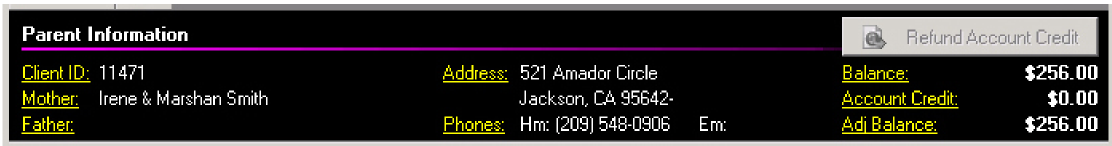


For users of previous versions of ProSchool, it should be noted that the **Account Ledger** view replaces the **Billing Information - Account Summary** window. This new view offers far more information in one view, broken down into three sections.

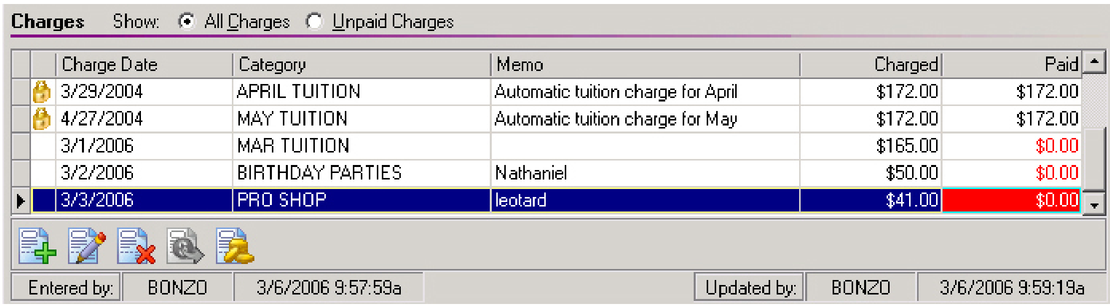
Getting Started With ProSchool's Ledger

-continued-

The **Parent Information** (top) section gives the Client's information and account standing:

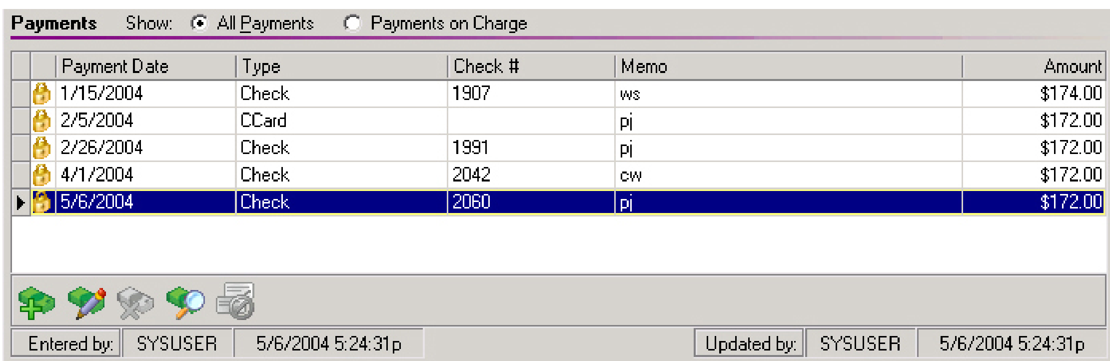


The **Charges** (middle) section details charges:



You can modify the view to display all charges, or just unpaid charges (depending on which option is selected). There are several buttons along the bottom left of this section that initiate various *charge*-related actions (we'll cover them shortly).

The **Payments** (bottom) section details the Client's payment history:



You can modify the view of this section to display all payments, or just payments on charge. As with the Charges section, this section contains several buttons along the bottom left. They initiate various *payment*-related actions (we'll cover these in following sections).

Another facet of the Account Ledger is the use of padlock lock icons in the Charges and Payments sections. They indicate different things depending on which section they appear in:

- **Charges** section: the icon (gold lock) indicates a charge to which a payment has already been applied. The opposite is also true; no lock, no payment has been applied. (Note: The green locks described below are NOT used in the **Charges** section.)
- **Payments** section:

  · the icon (green lock) indicates a payment that has been posted in the payment posting process. Payments with a green lock CAN be deleted, if you need to do so.

  · the icon (gold lock) indicates a payment that has been transferred to QuickBooks® and **cannot be deleted**.

Entering Charges in ProSchool

ENTERING CHARGES IN PROSCHOOL: AN OVERVIEW

ProSchool's financial tools are encompassed in the Account Ledger section. They are intuitive and straightforward, and do not require accounting experience to operate.

However, it is important to note that ProSchool's financial tools are *not* intended to replace a proper accounting system, such as QuickBooks® (which we obviously recommend, given ProSchool v3.0's seamless integration with this popular program). Instead, the financial tools in ProSchool were designed and intended to *compliment* your existing bookkeeping system (Quicken or otherwise) by streamlining your school's Accounts Receivables. Then, ProSchool organizes and summarizes your accounts receivables-related financial data through numerous reports that make entry into your existing bookkeeping system orderly and efficient.

UNDERSTANDING PROSCHOOL'S CHARGE ENTRY OPTIONS

In ProSchool, charges can be entered several ways:

- automatically – for entering a specific charge, such as monthly tuition, that applies to many or all Students (a very powerful function that saves a great deal of time);
- "Class Based" – for entering charges for Clients / Students for a specific class;
- "Billing Based" – for creating / entering charges based on previous / existing charges (such as entering a late charge for a previous charge that has not been paid yet);
- "Registration" – for entering charges for administrative fees such as registration and insurance;
- manually – for entering "one-of" charges (such as when you need to enter a single charge outside of your normal charge entry session).

Entering Charges in ProSchool

-continued-

AUTOMATIC TUITION CHARGES

ProSchool offers you a way to “batch” process tuition charges automatically. This allows you quick and efficient calculation of your school’s tuition charges for all currently enrolled Students.

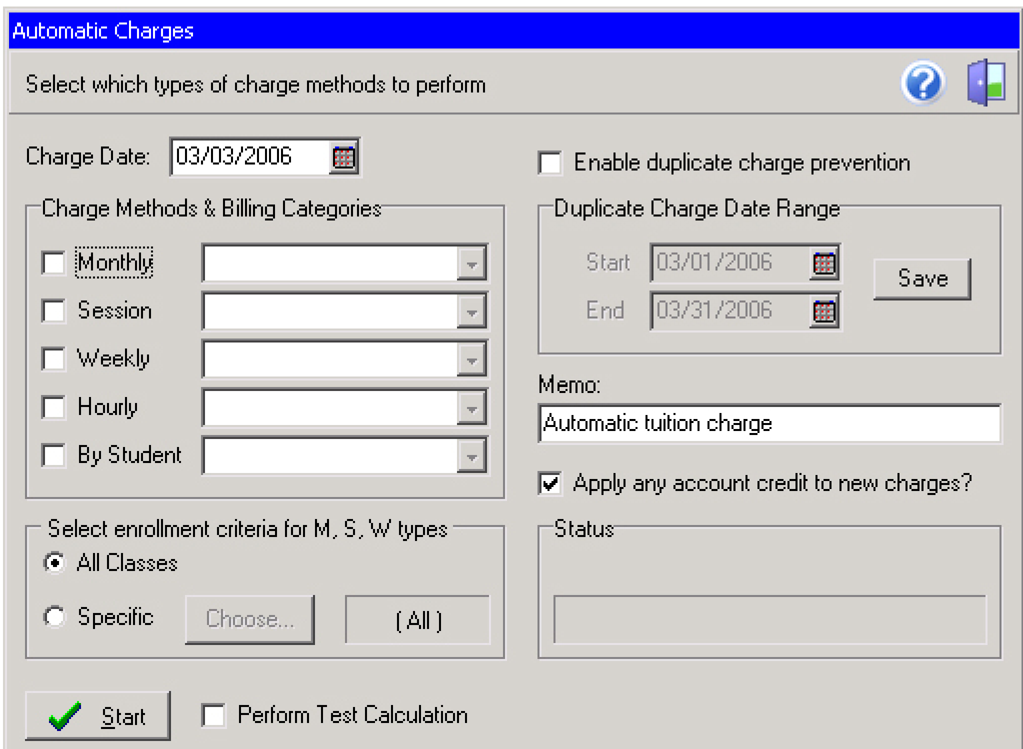
Entering an automatic charge is accomplished by first selecting the appropriate Charge Method (Monthly, Session, Weekly, Hourly, By Student), then selecting the appropriate Billing Category.

Not all school configurations will make use of all available Charge Method options, but the flexibility is there if you need it. For example: if your school only has one regular recurring charge such as monthly tuition, you may wish to use ProSchool’s automatic charge facility for that charge alone.

The bottom line: Using the automatic charge facility on a regular basis, even for just a single charge category, can save you a significant amount of time—especially if you have a large Student database.

To enter automatic tuition charges in ProSchool:

1. In the main menu bar, click the **Billing** pull-down menu. Select **Charge Entry / Automatic**. The **Automatic Charges** window opens:



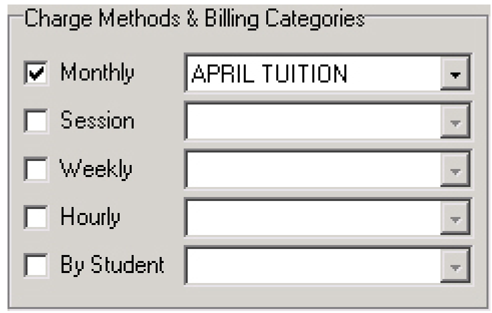
2. Determine the appropriate charge method for the charge you want to “batch” (**Monthly**, **Session**, **Weekly**, **Hourly** or **By Student**). Select it in the **Charge Methods & Billing Categories** section.

Entering Charges in ProSchool

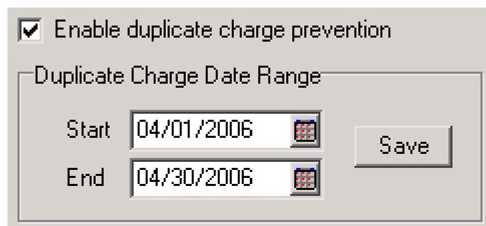
-continued-

3. Click the down-arrow in the field next to your choice to display a menu of the Billing Categories you previously configured for your School.

4. Select the appropriate Billing Category for the Charge Method you selected. For example, for a monthly tuition charge for April, the Automatic Charges window would appear as follows:



5. To prevent duplicate charges from occurring, select the **Enable duplicate charge prevention** option. The **Duplicate Charge Date Range** section immediately below will activate (become ungrayed).



6. Enter the appropriate **Start** and **End** dates (typically for the current billing period). This instructs ProSchool to check for previous charges for each Client in the selected category during the dates specified. If ProSchool finds such charges, it will skip the charge calculation for that particular Client. Therefore, the **Start** date should go back far enough to cover any period of time during which any manual charges in this specific category could have been entered.

7. To enter a brief message to be included with this charge on the Client's statement, do so in the **Memo:** field. Your message length is limited to 40 characters. This field is benign and has no affect on any other data fields. The default message is "Automatic Tuition Charge".

8. If you want ProSchool to automatically apply any outstanding credits to this charge, select the **Apply any account credit to new charges?** option. Then, if ProSchool finds an outstanding credit on any of the Client accounts to which this charge is being applied, it first bills the Client's account for the charge, then applies the Client's credit as payment toward the charge. (This keeps outstanding credits from accruing.)

9. If you chose the **Monthly**, **Session** or **Weekly** options, you also have the option of selecting a specific class or subset of classes for determining which Clients will be included in this automatic charge generation (or you can include all classes in the billing and skip to step #10).

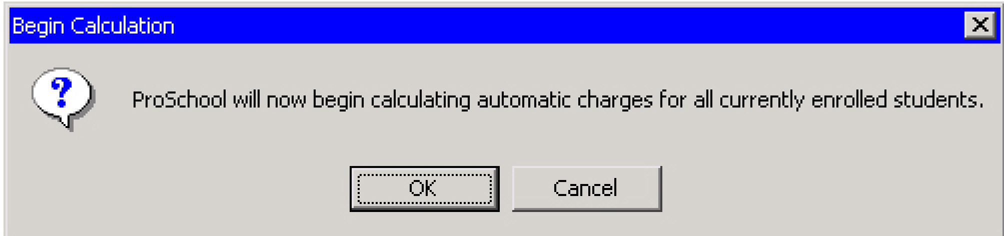
To choose specific class criteria, select **Specific** in the **Select enrollment criteria for M, S, W types** section, then click **Choose...** to open the **Search for a Class** window. Select the class or subset of classes you want, then click **OK** to return to the **Automatic Charges** window (or **Cancel** to return there).

Entering Charges in ProSchool

-continued-

10. Click 

to begin the automatic charge generation process. A dialog box will appear to confirm your intentions:

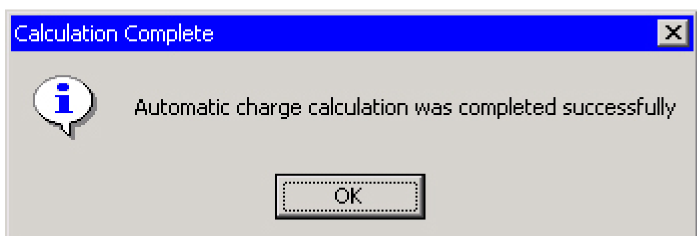


Click **OK** to proceed (or **Cancel** to return to the **Automatic Charges** window).

The progress bar gauge in the **Status** section monitors ProSchool's progress.

Note that this automatic charge function is processor-intensive as ProSchool is generating charges and updating balances for every Client included in the Charge Method you configured above. Therefore, ProSchool may take several minutes to finish the process, especially if your school has large Client and Student databases, and / or is running on an older computer.

When ProSchool finishes calculating the charges, the **Automatic charge calculation was completed successfully** dialog box will appear:



Click **OK** to return to the **Automatic Charges** window, then **Close** to return to the main menu bar.

PERFORMING TEST CALCULATIONS FOR AUTOMATIC TUITION CHARGES

When using the Automatic tuition charge function, you may wish to preview the charges ProSchool generates *before* they are applied (billed) to the Client accounts. This is done by using the "test calculations" function.

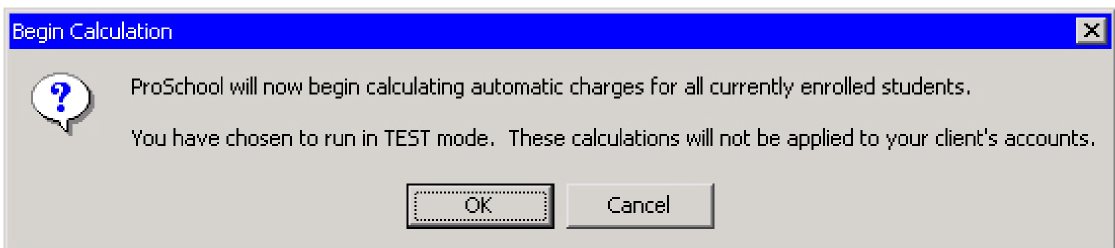
To preview automatic tuition charges using the "test calculation" function:

1. In the main menu bar, click the **Billing** pull-down menu. Select **Charge Entry / Automatic**. The **Automatic Charges** window opens (shown above in "Automatic Tuition Charges").

2. After entering your automatic tuition charge criteria (as explained in steps 2–9 in the above section, "Automatic Tuition Charges"), select the **Perform test calculation** option:

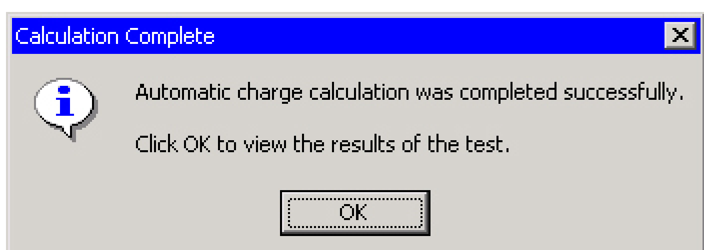
3. Click 

– ProSchool confirms the test status of this operation:



The progress bar gauge in the **Status** section monitors ProSchool's progress. As noted above, this automatic charge function is processor-intensive; even though these charges will not be applied, they are still being calculated so ProSchool may take several minutes to finish the process.

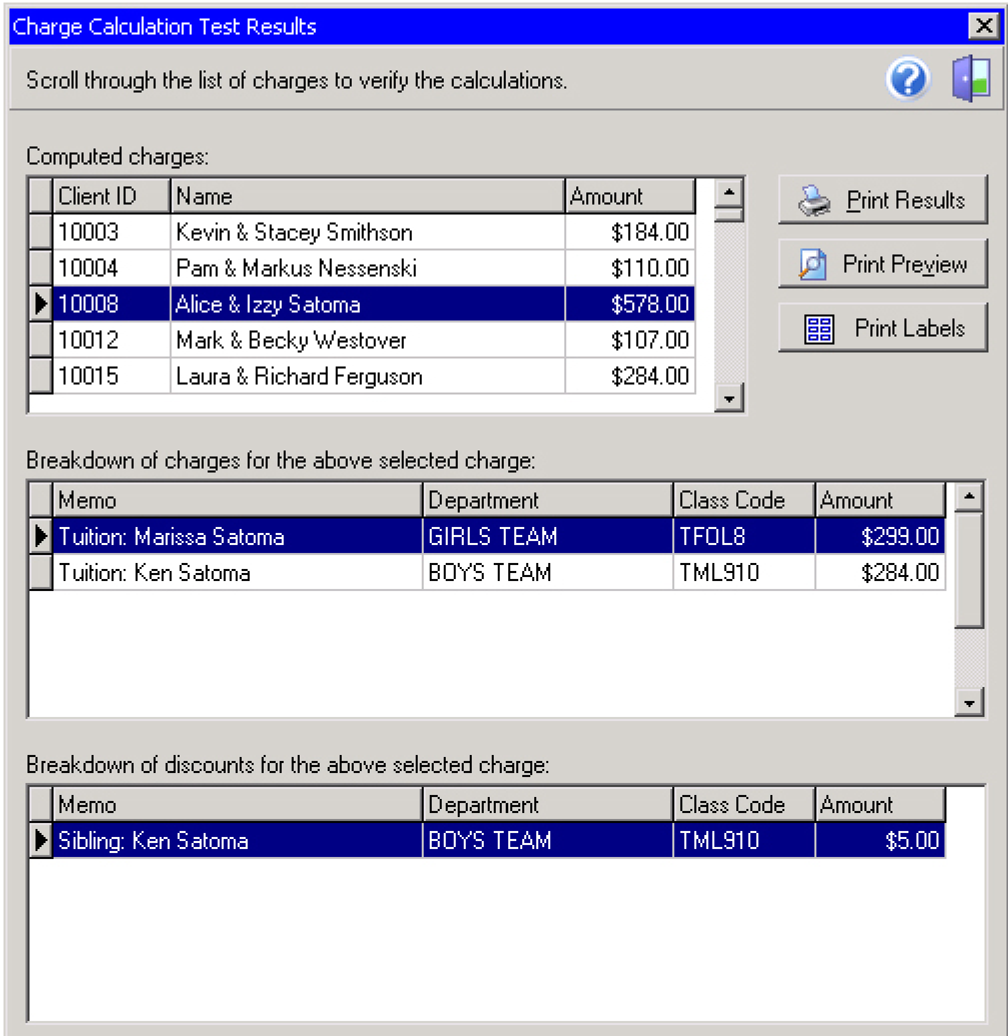
When ProSchool finishes calculating the charges in this test mode, the following dialog box appears:



Entering Charges in ProSchool

-continued-

Click **OK** to preview the charges and open the **Automatic Charge Calculation Test Results** window:



You can scroll through the various Client names in the **Computed Charges:** section. As you do, the details for the highlighted Client will appear in the **Breakdown of charges for the above selected charge:** section. If discounts applied to any of this client's charges, they are detailed in the **Breakdown of discounts for the above selected charge:** section.

Note that in the above illustration, these details include two charges, one for each Student currently enrolled in your school by client Alice & Izzy Natoma ($299.00 + $284.00). These appear in the **Breakdown of charges for the above selected charge:** section.

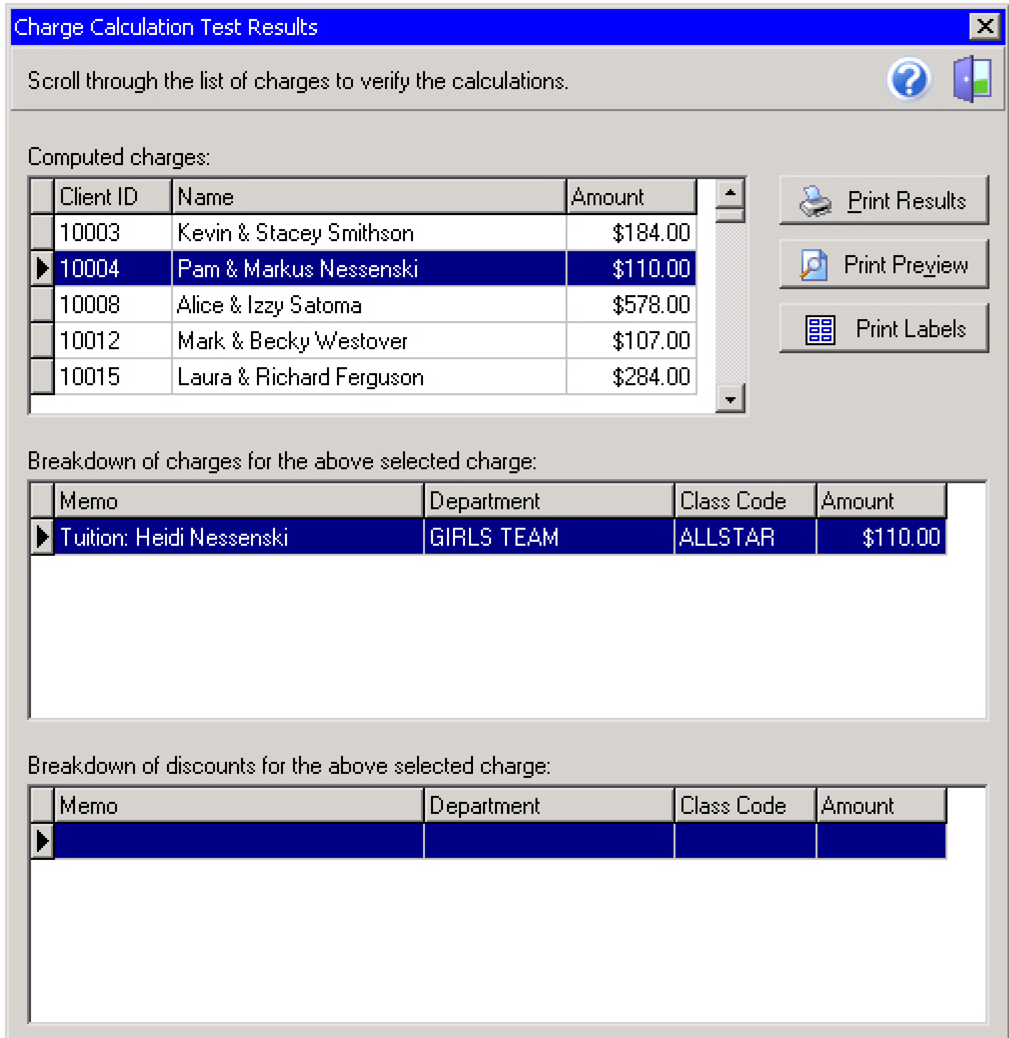
In addition, there is the Sibling discount of $5.00 that has been applied; it appears in the **Breakdown of discounts for the above selected charge:** section.

These three figures result in the total tuition charge of $578.00 ($299.00 + $284.00 – $5.00 = $578).

Entering Charges in ProSchool

-continued-

However, if ProSchool generates only one charge, as in the case of Student Heidi Nessenski, it would appear as follows:



Hint: If you are new to ProSchool, we suggest you take some time reviewing the results in the above Test Results window the first few times you use the Automatic Charges/Perform Test Calculation feature. ***These are test results; NO actual charges have been billed to the customer, nor will anything you do here affect the customer's actual account balance.*** *You can perform as many test calculations as you need until you get the billing configuration correct, without worrying about affecting any billing for your customers. To discard the test calculations without proceeding further, click* **X** *or*  *to return to the previous window.*

4. Click 

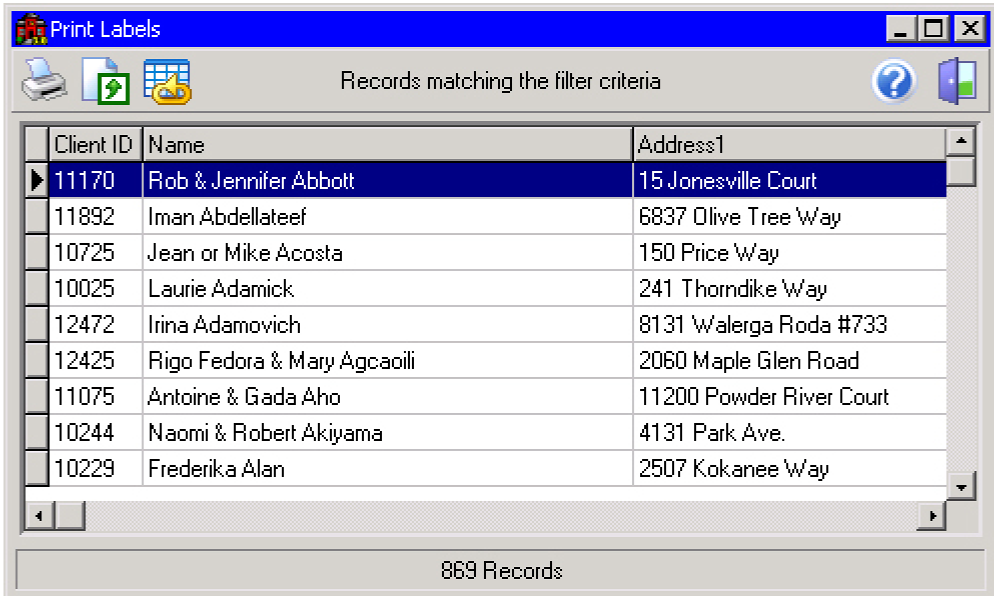
to print the results of the test calculation. The standard dialog boxes will appear with bar gauges indicating ProSchool's progress. When the print job is done, ProSchool returns you to the **Automatic Charge Calculation Test Results** window where you can exercise another option (or close the window if you're done).

Entering Charges in ProSchool

-continued-

5. Click Print Preview to preview the report on your screen before sending it to the printer. ProSchool then builds your “Automatic Charge Calculation Test Results” report and displays it on screen. Once it appears, you can navigate through it or exercise any of the options in the control bar (as explained in the chapter below, “Generating Reports in ProSchool”).

6. To print labels for all clients who accrued additional charges resulting from this charge calculation, click Print Labels to open the **Print Labels** window:



The following buttons represent the options available to you in this window:

 - prints the names in the list as labels;

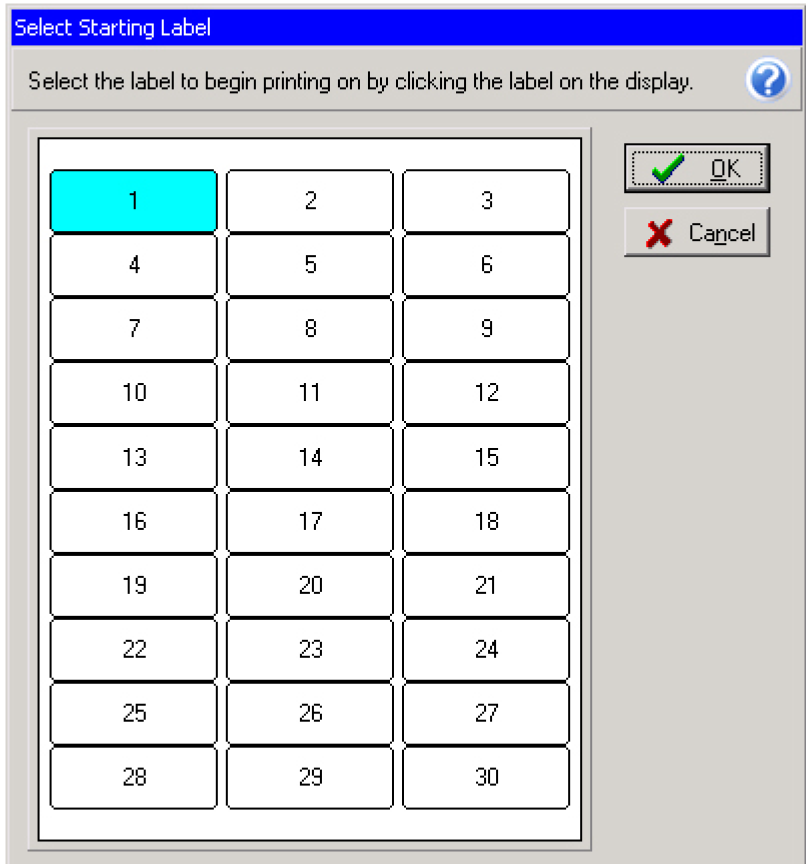
 - exports data (in comma-delimited fashion for importation into a data base or spreadsheet;

 - sorts data (based on criteria you define).

Entering Charges in ProSchool

-continued-

7a. To **print** the names on the list on labels, click  to open the **Select Starting Label** window:



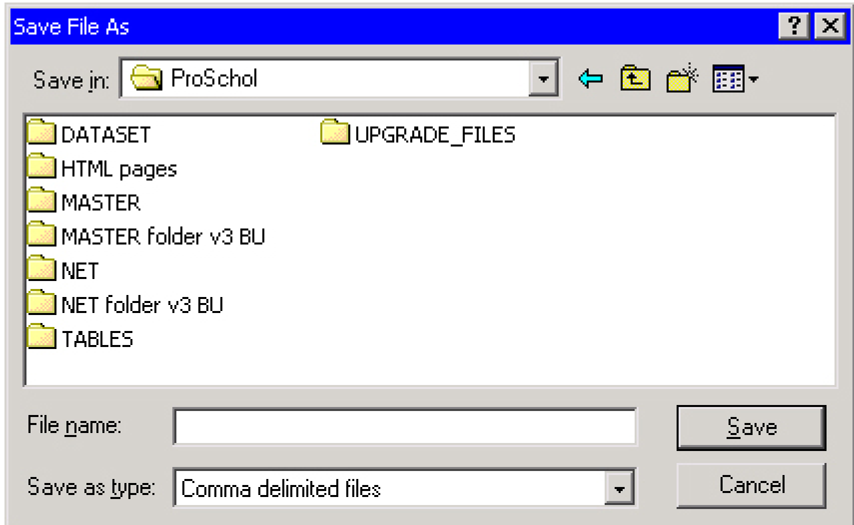
You can select the label on which you want to start printing, which is handy for those situations when you have a partially-used sheet of label stock.

7b. Click the label position on which you want to begin printing the current list of names, then click  to do so.

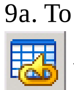
Entering Charges in ProSchool

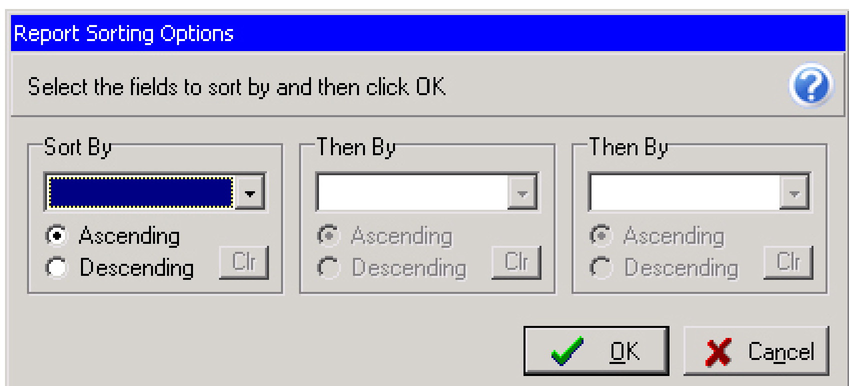
-continued-

8a. To **export** the names in the **Print Labels** window, click  to open the **Save File As** window:



8b. Navigate to the folder in which you want to save this list of names in (or create a new one), enter a name for the new file, and click **Save** to complete the process.

9a. To sort the names in the list into a different order before printing or exporting the list, click  to open the **Report Sorting Options** window:



You can sort the list of names by up to three separate criteria.

9b. To define the first sort criterion, use the drop-down menu in the **Sort By** section to select it, and select **Ascending** or **Descending** order (for example, if you want to sort by name you can select "Ascending Order", which delivers results from A to Z, or "Descending Order", which sorts results from Z to A). If you wish to define additional sort criteria, you can do so in the second (middle) and third (right) **Then by** sections. (If you wish to clear existing criteria in any of the three sections, click Clr to do so.)

Note that the headings of the three sort criteria fields are labeled in sequential fashion, which is the hierarchy in which ProSchool conducts the sorting process. In other words, ProSchool first sorts the list of names in the **Print Labels** window based on the sort criteria you defined in the in the **Sort By** section, *then* by the criteria (if any) you defined in the first **Then by** section, and lastly, by the criteria (if any) you defined in the second **Then by** section.

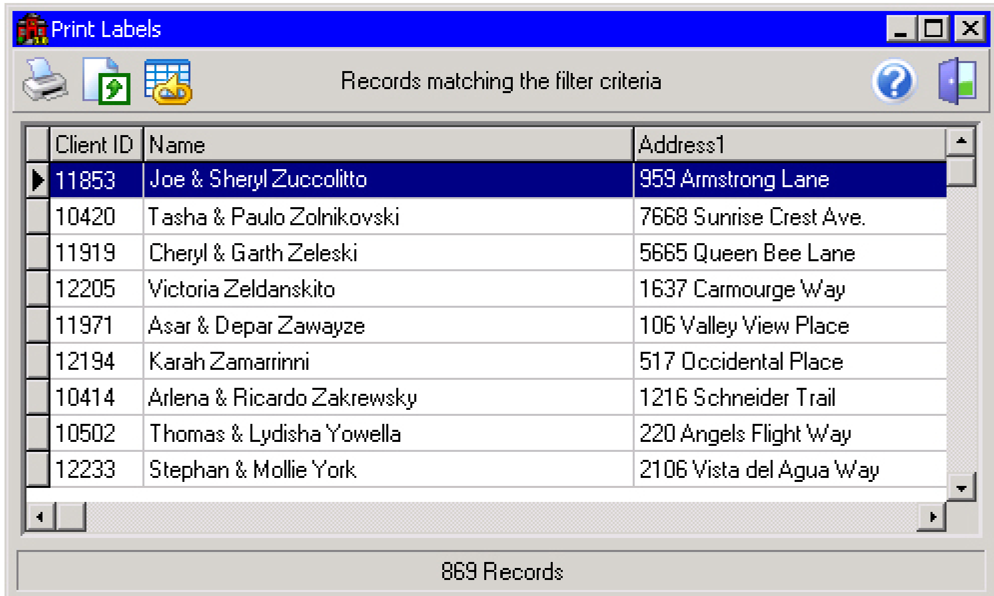
Entering Charges in ProSchool

-continued-

9c. When you are done defining your sort criteria, click 

to begin the sorting.

When the sorting process is completed, the **Print Labels** window will appear again with the new sort order:



The example above shows a sort by “Last Name” in “descending” order.

When you are done, click  to close the **Print Labels** window. You will return to the **Automatic Charge Calculation Test Results** window where you can exercise other options (or exit the window).

Entering Charges in ProSchool

-continued-

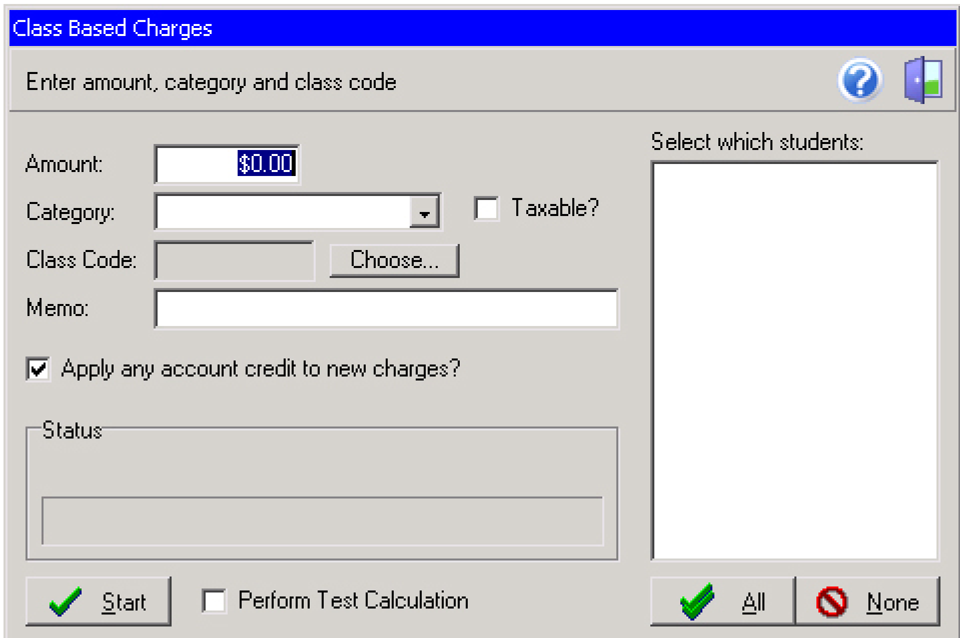
CLASS BASED CHARGES

ProSchool gives you the option of entering charges only for clients whose students are enrolled in a specific class. This is useful for entering tuition charges that are unique for a specific class or group of classes.

This function is accessed in the **Class Based Charges** window.

To enter class based charges:

1. In the main menu bar, click the **Billing** pull-down menu. Select **Charge Entry / Class Based**. The **Class Based Charges** window opens:



2. Enter the amount of the charge in the **Amount:** field.

3. Choose a billing category for this charge by clicking the down-arrow in the **Category:** field and selecting the appropriate category.

4. If this charge is taxable, select the **Taxable?** option.

5. Select the class for this charge by clicking the down-arrow in the **Class Code:** field and selecting the appropriate code. A list of the Students enrolled in the selected class will appear in the **Select which students:** section (see the screenshot immediately below).

Note that all Student names are highlighted by default; therefore, without further modification to this list, all Clients with Students in this class will be included in this charge.

Entering Charges in ProSchool

-continued-

6. To enter charges for the Clients of *all* Students listed, continue to step #7. Otherwise, here is how to modify the selection of Students whose Clients you will enter charges for:

- to *eliminate* only one or a few Student names, hold down the **CONTROL** key and then click on each Student you wish to eliminate from this list (that is, the Students whose Clients you do *not* wish to include in this charge);
- to *select only one or a few* Student names, first deselect all Student names by clicking 

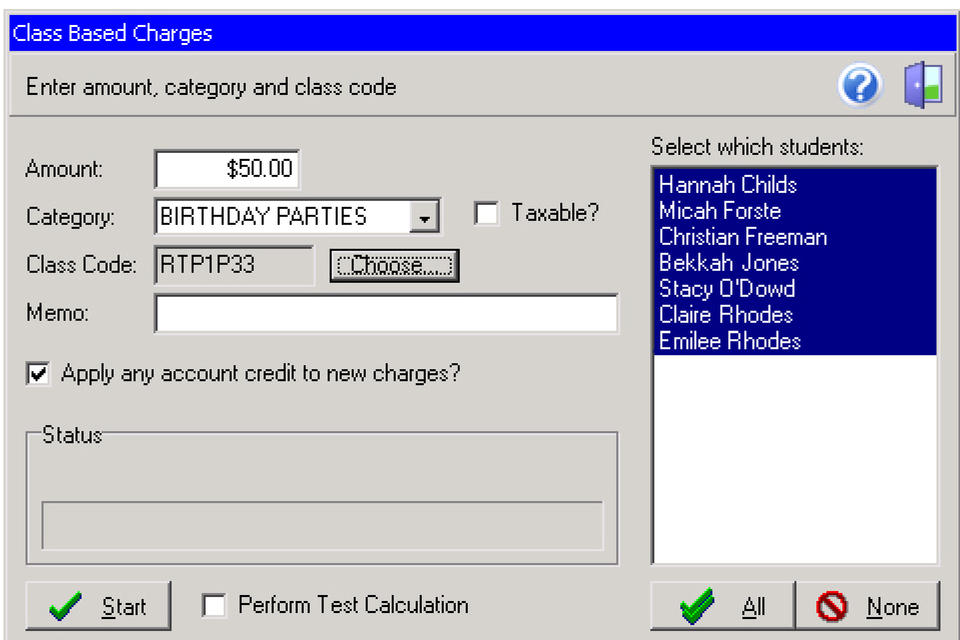
then hold down the **CONTROL** key and click on each Student you wish to keep on the list (that is, the Students whose Clients you *do* wish to include in this charge);
- Click 

to *select all* Students.

7. Enter a memo for reference purposes in the **Memo:** field. It will be included with this charge on the Client's statement. Your message length is limited to 40 characters. (This field is benign and has no affect on any other data fields.)

8. If you want ProSchool to automatically apply any outstanding credits to this charge, select the **Apply any account credit to new charges?** option. Then, if ProSchool finds an outstanding credit on any of the Client accounts to which this charge is being applied, it first bills the Client's account for the charge, then applies the Client's credit as payment toward the charge. (This keeps outstanding credits from accruing.)

After the above entries have been made, the completed window will appear something like this:

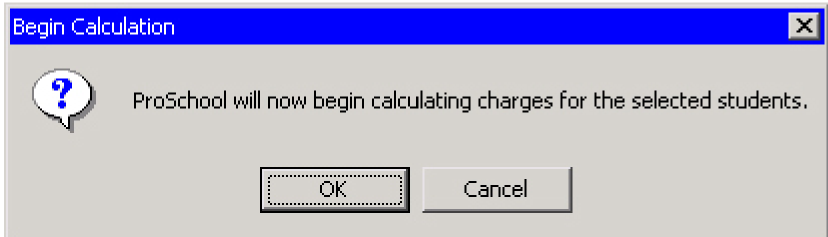


9. Select the **Perform Test Calculation** option to review the charge results before applying (billing) them to the appropriate Client accounts. (The configuration of this window is discussed earlier in this section—see "Performing Test Calculations for Automatic Tuition Charges".)

Entering Charges in ProSchool

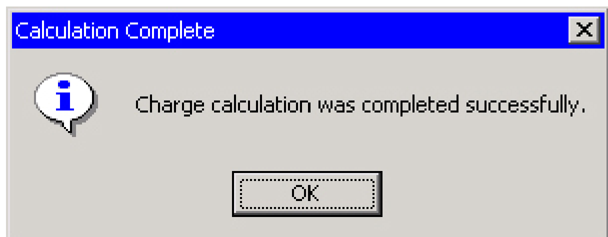
-continued-

10. Click **Start** to begin the charge generation process for all Clients whose Students are selected (highlighted) in the **Select which students:** section. ProSchool confirms your intentions:



11. Click **OK** to continue; the progress bar gauge in the **Status** section monitors ProSchool's progress. (Click **Cancel** to abort the process and return to the **Class Based Charges** window.)

12. When ProSchool finishes calculating the charges, a confirmation dialog box appears:



Click **OK** to return to the **Class Based Charges** window.

Hint: To see how this charge was added to a Client's account, note one of the Student names, close the **Class Based Charges** *window, click on the* **Ledger** *in the main menu bar and select that Student's Client. The class-based charge you just entered will appear as the most recent charge (at the bottom of the charge detail list—ProSchool always lists the oldest charges first and newest charges last).*

Billing Based Charges

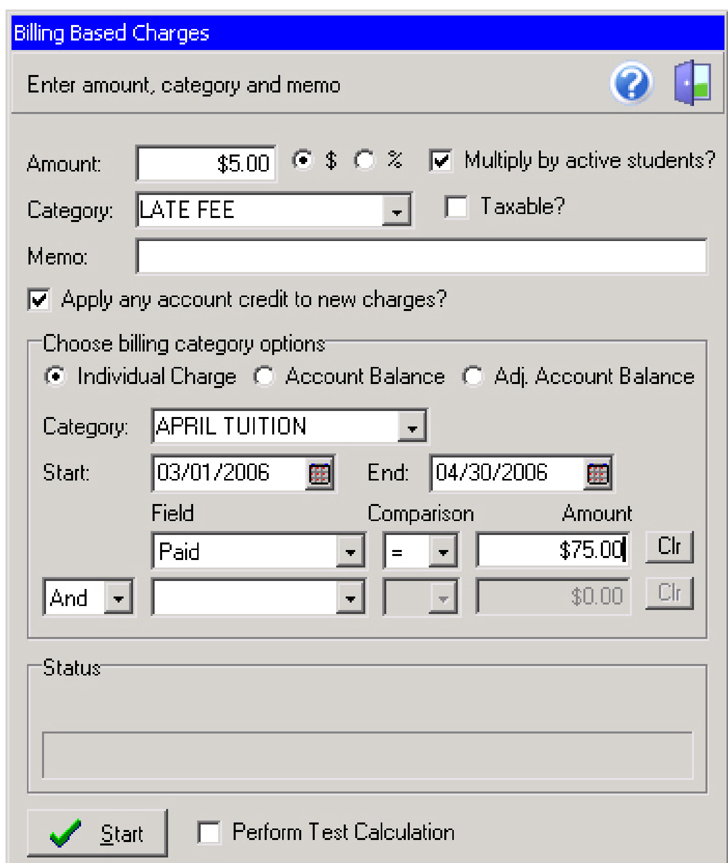
ProSchool gives you the option of entering charges for Clients based on previous charges *or* on a Client's account balance. For example, you could instruct ProSchool to generate new charges based on the following scenarios:

- To discourage late payments, you assess a late charge for Clients whose monthly tuition has not been paid by a certain day of the month (you can define "paid" as either in-full or a "minimum due" amount). This fee can be the same amount for all Clients, a percentage-based fee determined by your parameters, or computed on a per-Student basis so that the fee is multiplied by the number of active Students a Client has in your school.
- An insufficient (incorrect) charge amount was *previously* charged to certain Clients, so you retroactively charge those Clients the difference between the correct charge amount and what they had already been charged. In other words, ProSchool uses your criteria to determine which Clients were charged the incorrect amount and then enters new charges for the difference.
- Your school has a policy requiring all Clients to pay their account balances off in full by December 28 so you can clear off your books and start a new fiscal year January 1st. You charge a $25 "account maintenance fee" to any Clients who fail to pay down their accounts to a zero balance by December 28.

The first two examples above describe charges based on *previous charges*. The third describes a charge based on the Client's *account balance*. They are all explained below in that order.

To enter billing based charges:

1. In the main menu bar, click the **Billing** pull-down menu. Select **Charge Entry / Billing Based**. The **Billing Based Charges** window opens:



Entering Charges in ProSchool

-continued-

2. Enter the amount of the charge in the **Amount:** field and select "**$**" if you want this charge to be a specific amount;

OR...

Enter a percentage figure in the **Amount:** field and select "**%**" if you want this charge to be a percentage of the figure you define in the **Choose billing category options** section. Note that if you choose this percentage option, ProSchool computes the resulting amount to the nearest dollar.

3. Choose a billing category for this charge by clicking the down-arrow in the **Category:** field and selecting the appropriate category.

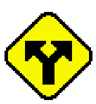
4. Make sure the tax flag is correct. If this category was originally set up as "taxable", the **Taxable?** box will automatically be selected. You can override this if necessary.

5. If you want ProSchool to multiply the amount of the charge by the number of Students enrolled by a Client, select the **Multiply by active students?** option. For example, if a Client has three active Students and the amount of the charge is $5.00, the amount of the charge for that Client will be $15.00. Otherwise, every Client who meets the criteria you enter in the following steps will be charged the amount entered in the **Amount:** field as a "flat" rate *regardless* of the number of active Students that Client has in your school.

6. In the **Memo:** field, enter a brief message such as, "Late charge for April tuition" (the **Memo:** field is limited to 40 characters);

7. If you want ProSchool to automatically apply any outstanding credits to this charge, select the **Apply any account credit to new charges?** option. Then, if ProSchool finds an outstanding credit on any of the Client accounts to which this charge is being applied, it first bills the Client's account for the charge, then applies the Client's credit as payment toward the charge. (This keeps outstanding credits from accruing.)

8. Select the **Perform Test Calculation** option to review the charge results before applying (billing) them to the appropriate Client accounts. (The configuration of this window is discussed earlier in this section—see "Performing Test Calculations for Automatic Tuition Charges".)



- To base this charge on a previous charge (as in the first and second scenarios), continue below;
- To base this charge on the Client's *account balance*, go directly to step #10 (which follows **EXAMPLE ❷**).

---

9. In the **Choose billing category options** section, you must select from one of three types of criteria on which you are basing your new charge. The appropriate subfields in this section will become active depending on which of these three criteria you choose.

- The **Individual Charge** option is used when you are basing your new charge on a *specific type of existing charge*. To do so, you would define the existing charge by selecting its billing category, a date range during which the existing charge could have occurred, and finally, by setting a filter (dollar amount) for the existing charge.
- The **Account Balance** option is used when you are basing your new charge on the *Client's account balance*. The only criteria you would need to establish would be a dollar amount range. This does not take into account any remaining credit the Client may have.
- The **Adj. Account Balance** option is similar to the above option, except that the balance is *adjusted* to reflect any credits the Client has in their favor (which would result in a lower balance, all other things being equal). As above, the only criteria you would need to establish would be a dollar-amount range.

Entering Charges in ProSchool

-continued-

These various criteria fields are configured as follows (remember, not all fields are used for all of the three options in the **Choose billing category options** section):

- **Category:** – select the *billing category* you want ProSchool to examine in arriving at this determination;
- **Start:**, **End:** – Select the *time frame* you want ProSchool to use in making the determination;
- **Field** – click on the down-arrow and select the *type of data* you want ProSchool to use from the above-specified billing category as a determining factor ("Amount", "Paid", "Balance", "Credits", "Tax");
- **Comparison** – select the mathematical sign ("operator") that represents the *type of comparison* you want ProSchool to make against the **Amount** ("operand") entered in the next step:

  "**=**" – the charge specified in the upper section of the Billing Based Charges window will be entered for a Client if the value of [item specified in **Field**] is equal to the [value of **Amount**];

  "**< >**" – the charge will be entered if the value of **Field** is *less than OR greater than, but not equal to,* the **Amount**;

  "**<**" – the charge will be entered if the value of **Field** is *less than* the **Amount**;

  "**>**" – the charge will be entered if the value of **Field** is *greater than* the **Amount**,

  "**<=**" – the charge will be entered if the value of **Field** is *less than or equal to* the **Amount**.

  "**>=**" – the charge will be entered if the value of **Field** is *greater than or equal to* the **Amount**;

- **Amount** ("operator") – enter the dollar amount you wish ProSchool to use in its comparison.

To illustrate how you would configure the above fields, we will expand on one of the examples given at the beginning of this section and assume the following:

- tuition is billed on the first of the month and is considered late if not paid in full by the 14th of the month;
- tuition is $75 per month;
- the current date is March 15 (the date on which payments are considered late).

Entering Charges in ProSchool

-continued-

EXAMPLE ❶ Your school's policy is to assess a late charge of $5.00 on all Clients who have not made any payment (full or partial) toward their monthly tuition by the 15th of the month. You have configured your school to charge tuition on a per-student basis and therefore configured this late fee the same way (that is, if a Client has three active Students and falls behind in tuition payments for all three, he is charged a total late fee of $15.00, not $5.00).

Here's how you would configure the **Billing Based Charges** window:

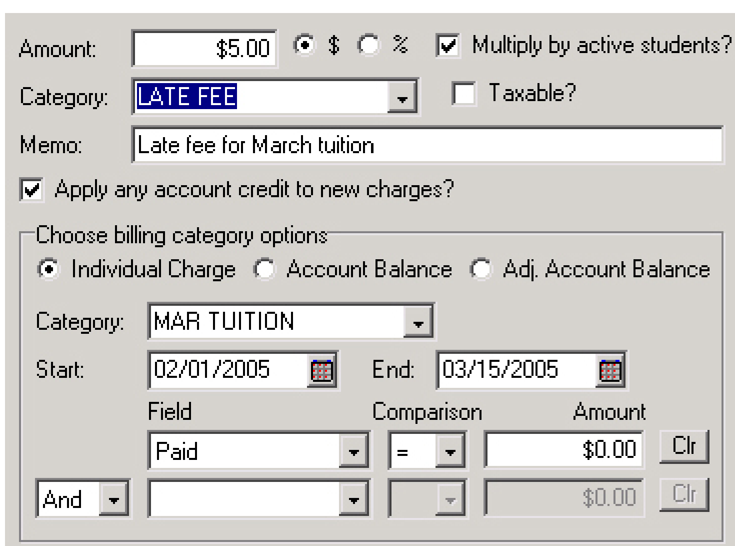
In the section, **Enter amount, category and memo**, do the following...

- **Amount:** – Enter "5.00" and select "**$**";
- **Category:** – select "LATE CHARGE" (assuming that is the name of a charge category you created in the earlier section entitled "Setting Up ProSchool Billing Categories";
- **Multiply by active students?** option – select this, as you have decided to assess the late charge on a per-student basis;
- **Memo:** – enter "Late charge for March tuition", or similar explanatory note;

In the section, **Choose billing category options**, enter the following...

- select **Individual Charge**;
- **Category:** – select "MAR TUITION";
- **Start:** – enter or use the pop-up calendar to select "2/1/05" (this is the beginning date ProSchool will use in looking for any charges for March's tuition, and will allow for any manual charges that may have been entered—"billed"—as early as February 1st);
- **End:** – enter "3/15/05", the current date, so ProSchool will find any March tuition charges entered through today (ProSchool defaults this date to the last day of the current month, which would also work since we are assuming that today is the 15th and charges cannot be entered in the future!);
- **Field** – select "Paid";
- **Comparison** – select "**=**";
- **Amount** – enter "$0.00".

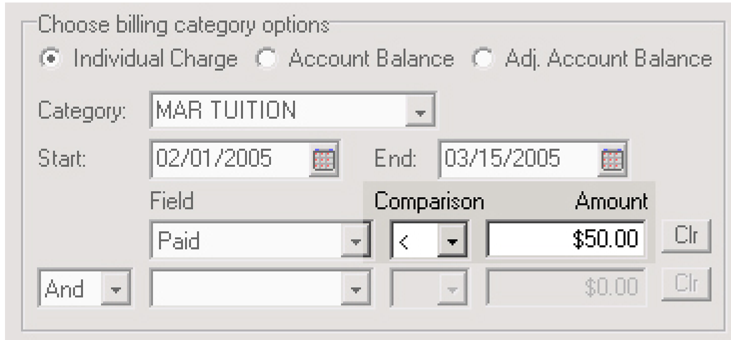
The above criteria would appear in the **Billing Based Charges** window as follows:



Entering Charges in ProSchool

-continued-

On the other hand, perhaps your policy is to assess a late fee only if the Client has paid less than two-thirds of the tuition owing by the 15th. Based on the above example, a monthly tuition of $75 would require a payment of $50 by the 15th in order to avoid the $5 late charge. This policy would be represented by the following changes made in the **Amount** and **Comparison** fields:



Using the above criteria, ProSchool looks for March tuition charges that were charged between 2/1/05 and 3/15/05 and accesses a $5 late charge if a payment of at least $50 has not been made.

! Hint: When running “late fee” calculations for late charges, it is important they be run *on the day they are first considered late* (in our example, the 15th)—<u>not</u> thereafter. Here’s why: If your payments are due by the 15th but you run the calculations on the 18th, any payments made on the 15th, 16th, 17th—or even on the 18th *prior* to your calculations—will *not* be considered late because they were applied at a point in time *preceding* your calcs. In other words, they were there when the calculations were initiated so ProSchool has no way of knowing they were late. Hence, no late charge is billed to the Client’s account.

Remember that we configured the late fee in these above examples so that it would be multiplied by the number of Students enrolled by a Client. The late charge can also be configured so that you could charge a *flat* late fee, such as $25, regardless of the number of Students enrolled by a Client.

To do this you would configure the **Billing Based Charges** window a bit differently; the main difference is that the **Multiply by active students?** option would be left <u>un</u>selected:

Note that the threshold amount can be anything you wish. In the example immediately above, we assessed a *flat* late fee for Clients who pay anything less two-thirds of the full tuition amount. However, as you have seen, you can choose a threshold amount of lesser or greater value—or charge no late fee at all, if you wish. It is entirely up to you.

Entering Charges in ProSchool

-continued-

Instead of charging a late charge as a set amount, you could configure this charge so that it is a *percentage* of the outstanding balance owed from the previous charge on which it is based (the $75 monthly tuition we used previously). In this example we will use a “flat” fee of 20 percent regardless of the number of Students enrolled by a given Client. Here’s how you would configure the **Billing Based Charges** window:

In the section, **Enter amount, category and memo**, only the following would be changed:

- **Amount:** – Enter “20.00” and select “**%**”;
- **Multiply by active students?** option – unselect this, as you have decided to charge this fee as a flat percentage instead of per-Student;

No changes would be necessary in the **Choose billing category options** section. In total, the above changes would look like this:

If you had wanted to create late charges computed on a per-Student basis—such as 10 percent for *each* Student enrolled by a given Client, the above section would be configured like this:

EXAMPLE ❷ You discover that a flat $15 Special Events fee previously charged to each of your Clients was incorrectly charged at a lesser amount of $5 for some Clients. In this example, the undercharged Clients will be retroactively charged $10.00, the difference between the correct charge amount and what they had already been charged (in other words, ProSchool uses your criteria to determine which Clients were charged the incorrect amount and then enters new charges for the difference, for those Clients). As in example #2 above, this function saves you the time and hassle of reviewing each Client record to see which were charged the correct amount and which were undercharged.

Here’s how you would configure the **Billing Based Charges** window:

In the section, **Enter amount, category and memo**, enter the following...

- **Amount:** – Enter “10.00” and select “**$**”;
- **Multiply by active students?** option – unselect this, as this charge is a per-Client charge assessed regardless of the number of Students actively enrolled by a Client;
- **Category:** – select “SPECIAL EVENTS” (assuming that is a valid charge category);
- **Memo:** – if you wish, enter a message such as, “Correcting charge, Special Event fee”;

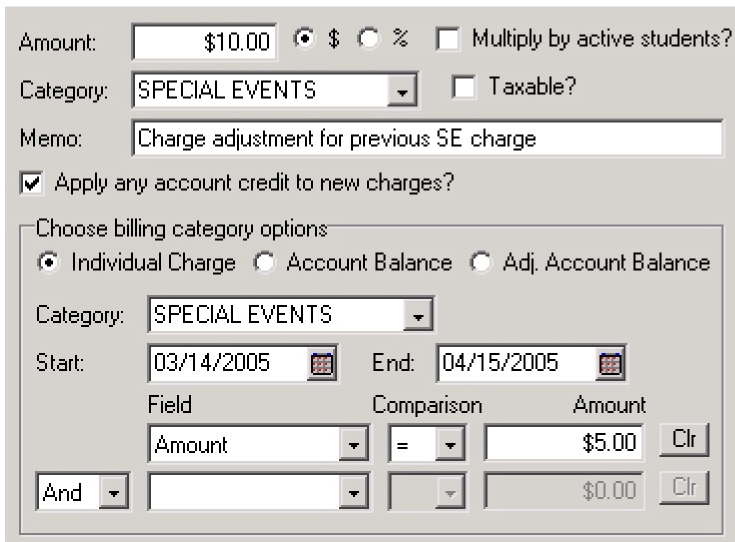
Entering Charges in ProSchool

-continued-

In the section, **Choose billing category options**, enter the following...

- **Category:** – select "SPECIAL EVENTS";
- **Start:** – enter or use the pop-up calendar to select "3/14/05" (this way, ProSchool will check back to a date *just prior* to that on which last month's statements were generated);
- **End:** – enter "4/15/05" (the current billing date, so this statement will reflect any Special Events charges subsequently entered to date);
- **Field** – select "Amount";
- **Comparison** – "**=**";
- **Amount** – enter "5.00".

The above criteria would appear in the **Billing Based Charges** window as follows:



Using the above criteria, ProSchool will look for Client accounts that were assessed a $5.00 Special Events charge between 3/14/05 and 4/15/05. For each one it finds, an additional Special Events charge of $10.00 will be entered.

ProSchool allows you to enter up to three conditions (value comparisons) in the **Choose Billing Category Options** section. The second and third tiers are configured exactly as the first in the examples above, with one additional field: the **And** / **Or** field immediately to the left of the second and third tier fields allows you to specify that you want conditions met independently, in multiples or both.

Think of it this way:

In order for a certain charge to be entered for a given Client...

[condition A must be met] OR [condition B must be met] OR [condition C must be met]— in which *only one* of the conditions has to be met in order for the charge to occur;

[condition A must be met] AND [condition B must be met] AND [condition C must be met]— in which *all three* conditions have to be met in order for the charge to occur;

[condition A must be met] OR [condition B must be met] AND [condition C must be met]— in which "A" alone must be met, OR *both* condition "B" and "C" must be met, in order for the charge to occur.

Entering Charges in ProSchool

-continued-

For an in-depth discussion of the **And** / **Or** field, see “Using ProSchool’s Context-Sensitive Search Function” in a previous chapter.

- To complete the process of entering billing based charges that are based on previous charges, **go directly to step #12**;
- To configure new billing based charges based on a Client’s account balance, **continue to step #10**.

---

10. To configure new billing based charges based on a Client’s *account balance*, the **Choose Billing Category Options** window would be configured differently than above. We’ll use the third example given at the beginning of this section:

EXAMPLE ❸ Your school has a policy requiring all Clients to pay their account balances off in full by December 28 so you can clear off your books and start a new fiscal year January 1st. Any Clients who fail to pay their accounts down to zero are charged an “account maintenance fee” of $25.

Here’s how you would configure the **Billing Based Charges** window using the above scenario:

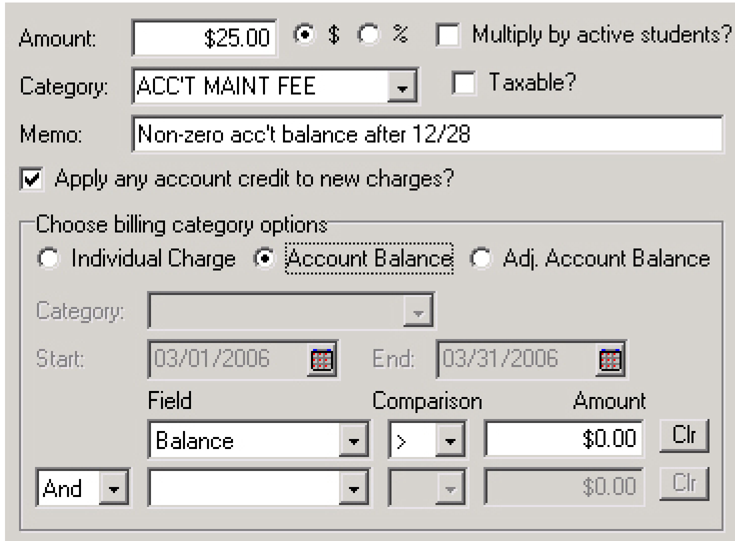
11. In the **Enter amount, category and memo** section, enter the following...

- **Amount:** – Enter “25.00” and select “**$**”;
- **Multiply by active students?** option – <u>un</u>select this, as this charge is a per-Client charge assessed regardless of the number of Students actively enrolled by a Client;
- **Category:** – select “ACC’T MAINT FEE” (or other billing category name you have created);
- **Memo:** – if you wish, enter a message such as, “nonzero acc’t balance after 12/28”.

In the section, **Choose billing category options**, the **Category:**, **Start:** and **End:**, entry fields will appear grayed out (inactive); the remaining entry fields are completed as follows:

- select **Account Balance**;
- **Field** – “Balance” is the only option available;
- **Comparison** – “**>**”, as this new charge will based on any account balance “greater than” zero;
- **Amount** – enter “0.00”.

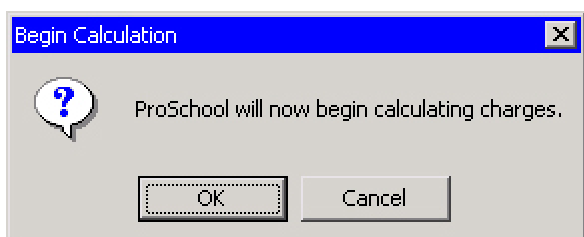
The above criteria would appear in the **Billing Based Charges** window as follows:



Hint: Remember that ProSchool "looks" at conditions in real time. In other words, this charge looks at a Client's account balance only at that moment in time when the charge is created. It cannot be configured to automatically create charges based on periodic or date-specific "snapshots" of a Client's account balance.

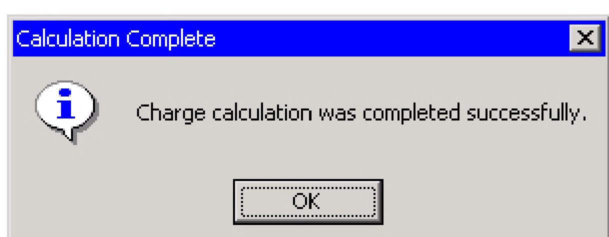
12. Select **Perform Test Calculation** to review the charge results before applying (billing) them to the appropriate Client accounts. This procedure would be the same as in the above "Performing Test Calculations for Automatic Tuition Charges" section, with the following exception: certain charges do not include (nor display) any additional details in the **Details about the above selected charge:** section.

13. Click **Start** to begin the charge generation process as configured above. ProSchool confirms your intentions:



14. Click **OK** to continue; the progress bar gauge in the **Status** section monitors your progress.

15. When ProSchool finishes calculating the charges, a confirmation dialog box appears:



Click **OK** to return to the **Billing Based Charges** window.

Entering Charges in ProSchool

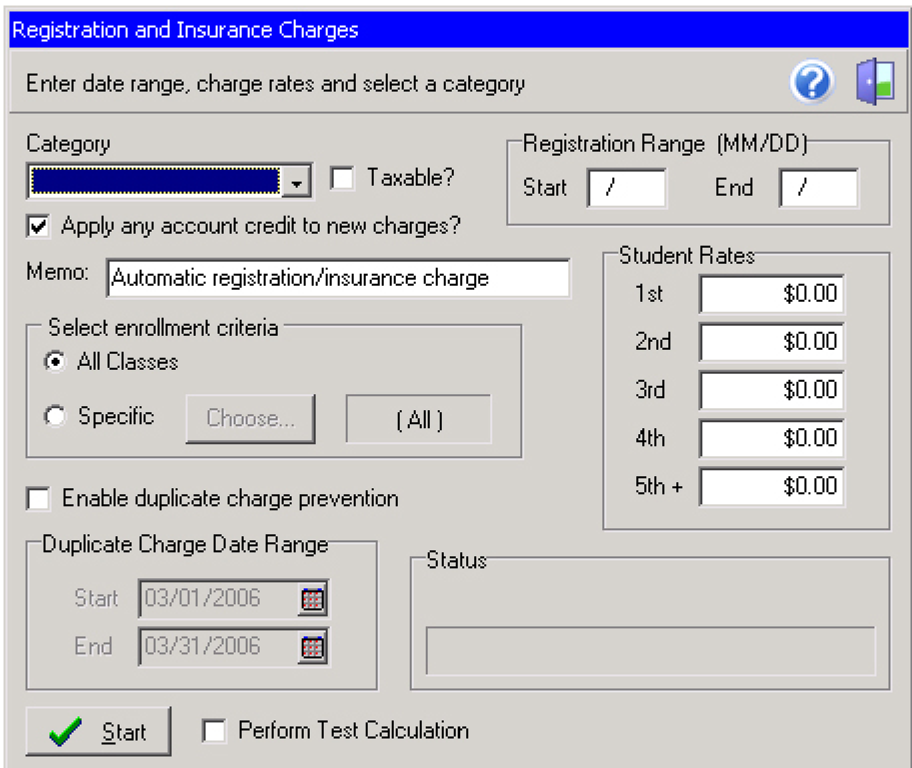
-continued-

■ REGISTRATION AND INSURANCE CHARGES

ProSchool gives you the option of entering charges for registration and insurance fees. Note this is a *single* charge—not a split charge made up of a separate fee for registration and another fee for insurance. Therefore, this fee designation can be used to capture any fees related to registration, insurance or other administrative costs you incur in the operation of your school. This function is accessed in the **Registration and Insurance Charges** window that appears below.

To enter registration and insurance charges:

1. In the main menu bar, click the **Billing** pull-down menu and select **Charge Entry / Registration**. The **Registration and Insurance Charges** window opens:



2. Select a billing category for this charge by clicking the down-arrow in the **Category:** field and making the appropriate choice.

3. Make sure the tax flag is correct. If this category was originally set up as "taxable", the **Taxable?** box will automatically be selected. You can override this if necessary.

4. Enter the desired date range in the **Registration Date Range** field (entered in MM / DD format). This ensures that ProSchool will enter registration and insurance fees *only* for Clients who registered Students within this period (subject to the other criteria entered elsewhere in the **Registration and Insurance Charges** window).

5. If you want ProSchool to automatically apply any outstanding account credits to this charge, select the **Apply any account credit to new charges?** option. Then, if ProSchool finds an outstanding credit on any of the Client accounts to which this charge is being applied, it first bills the Client's account for the charge, then applies the Client's credit as payment toward the charge. (This keeps outstanding credits from accruing.)

Entering Charges in ProSchool

-continued-

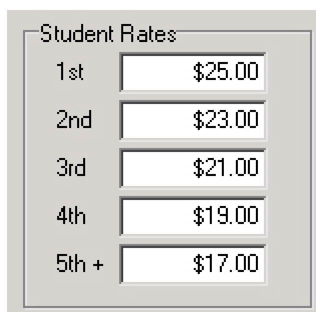
6. To enter a brief message to be included with this charge on the Client's statement, do so in the **Memo:** field. Your message length is limited to 40 characters. (This field is benign and has no effect on any other data fields.)

7. If you want to apply (bill) the charge to *all* Clients with active Students in your school without regard to enrollment criteria (the default), skip to step #8. Otherwise, to base the charge on specific enrollment criteria, click **Choose Classes** in the **Select Enrollment Criteria** section to open the **Search for a Class** window. Select the class or subset of classes to determine which Students to base the charges on. Click **OK** to return to the **Registration and Insurance Charges** window (or **Cancel** to return there).

8. To discount registration and insurance fees on a sliding scale based on the number of Students registered by a single Client, configure the following values in the **Student Rates** section:

- "**1st**" field – typically, the full (undiscounted) registration / insurance fee for a single Student;
- "**2nd**" field – at your option, a discounted registration / insurance fee for the second Student enrolled by the same Client (if you choose not to discount registration fees for the second Student from the same Client, use the same value as the **1st** field);
- "**3rd**", "**4th**", "**5th+**" fields – at your option, a discounted registration / insurance fee for the third, fourth and fifth+ Students enrolled by the same Client (if you choose not to discount a subsequent tier further, use the same value you entered in the field for the previous tier; if you choose not to discount registration fees for the second, third, fourth and fifth Students from the same Client, use the same values as you did for the **1st** field).

For example, if your normal registration charge is $25.00 and you want to apply a sliding scale in which the charge for each successive Student would be discounted by $2.00, you would enter the following values:



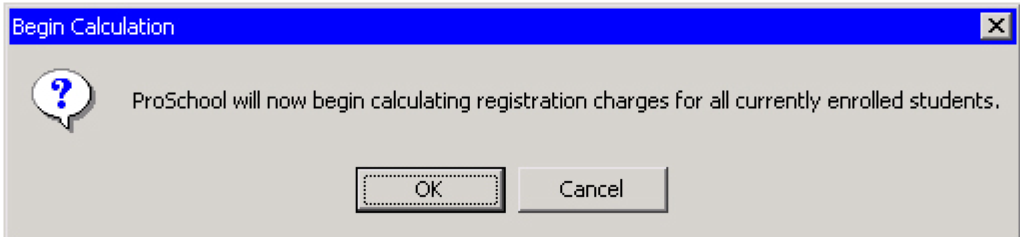
9. To prevent duplicate charges from occurring, select the **Enable duplicate charge prevention** option; the **Duplicate Charge Date Range** section immediately below will activate (become ungrayed). Enter the appropriate **Start** and **End** dates (typically for the current billing period).

10. Select **Perform Test Calculation** to review the charge results before billing them to the appropriate Client accounts. (The configuration of this window is discussed earlier in this section—see "Performing Test Calculations for Automatic Tuition Charges".)

Entering Charges in ProSchool

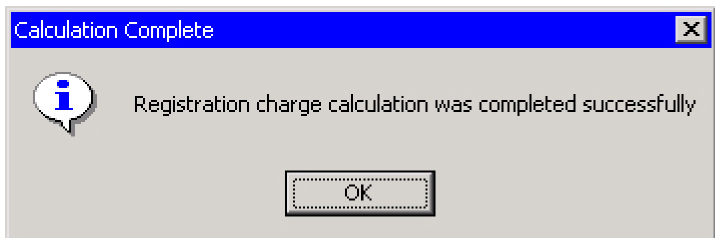
-continued-

11. Click **Start** to begin the registration charge generation process for all Clients whose Students meet the criteria you configured. ProSchool confirms your intentions:



Click **OK** to continue (Or **Cancel** to return to the previous window); the progress gauge in the **Status** section monitors ProSchool's progress.

12. When ProSchool finishes calculating the charges, a confirmation dialog box appears:



Click **OK** to return to the **Registration and Insurance Charges** window.

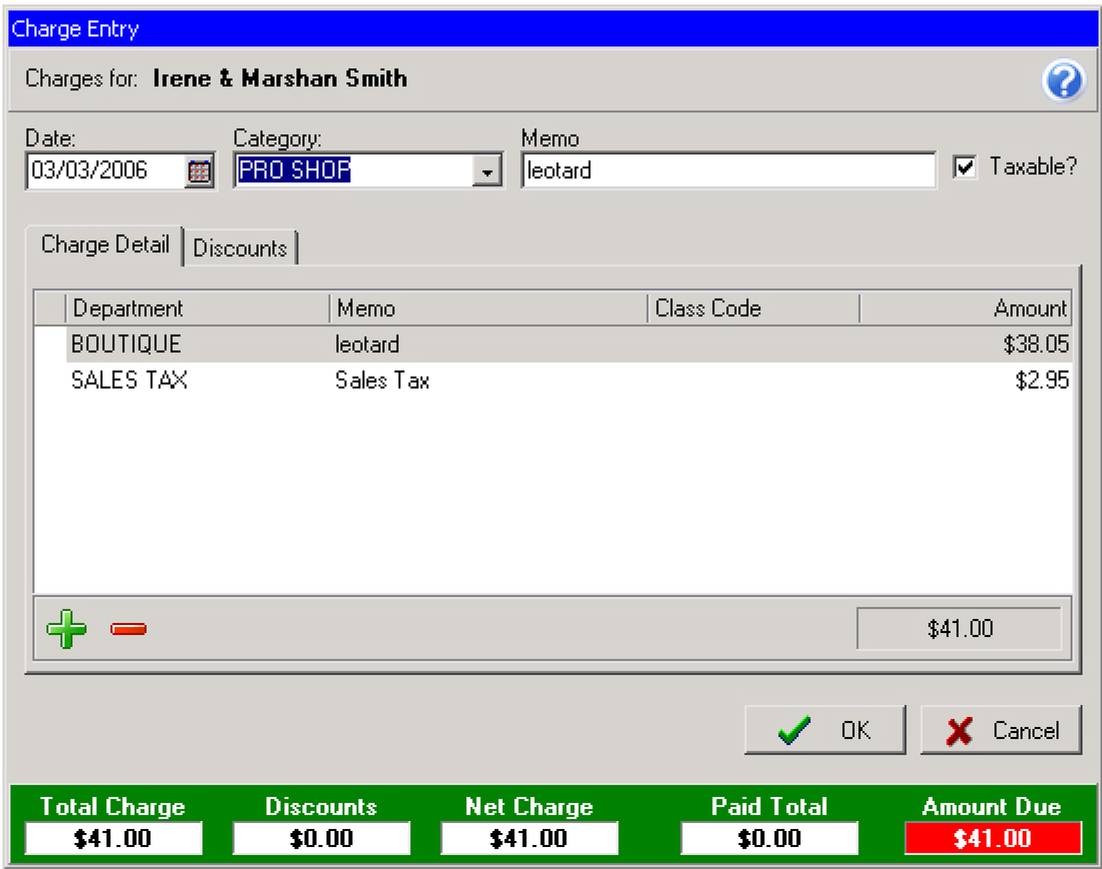
MANUAL CHARGES

In ProSchool, the vast majority of charges are entered—or automatically generated—as described in the previous sections. However, there are instances when you'll need to enter a charge manually. This is easily done in the **Account Ledger** window.

To enter charges manually:

1. Open the **Account Ledger** panel and select the Client you want to enter the charge for (as described previously).

2. Click from within the **Charges** section to open the **Charge Entry** window:



3. To change the current (today's) date, enter another date using the MM / DD / YYYY format. Alternately, you can click immediately to the right of the **Date:** field. The pop-up calendar will assist you with your selection.

4. Enter the appropriate billing category by selecting it in the **Category** drop-down menu.

5. If you wish, you can enter a brief message to be included with this charge on the Client's billing statement; do so in the **Memo:** field. (Your message length is limited to 40 characters.)

6. Enter the specifics of this charge in the tabbed **Charge Detail** section using the appropriate **Department**, **Memo**, **Class Code**, and **Amount** info.

If this charge is actually an aggregate of two or more charges—such as from multiple departments—you can itemize or "break down" the charge in the **Charge Detail** section.

Entering Charges in ProSchool

-continued-

7. If this charge is taxable, check the **Taxable?** check box. ProSchool automatically calculates the sales tax and creates a separate entry for it (as shown above for the “leotard” purchase).

8. If a discount applies to this charge, you can enter it by clicking on the **Discounts** tab, then clicking  to enter the appropriate information, as you did in the **Charge Detail** section (the fields are identical). You can enter discounts for multiple that correspond with multiple charges, if you wish.

9. To delete any charge or any discount entry, click on the entry you want to delete and click to do so.

Hint: The **Charge Details** *window is a valuable tool for documenting the “nuts and bolts” of a charge. It is strongly recommended that you use this section for* *<u>any</u>* *credits that you apply, and make liberal use of the “memo” fields. This way, the pertinent data is accessible in the future if you, a Client or your accountant has questions about how or why a charge or credit was applied.*

Entering and Prorating Tuition Charges for a Single Family

ENTERING AND PRORATING TUITION CHARGES FOR A SINGLE FAMILY

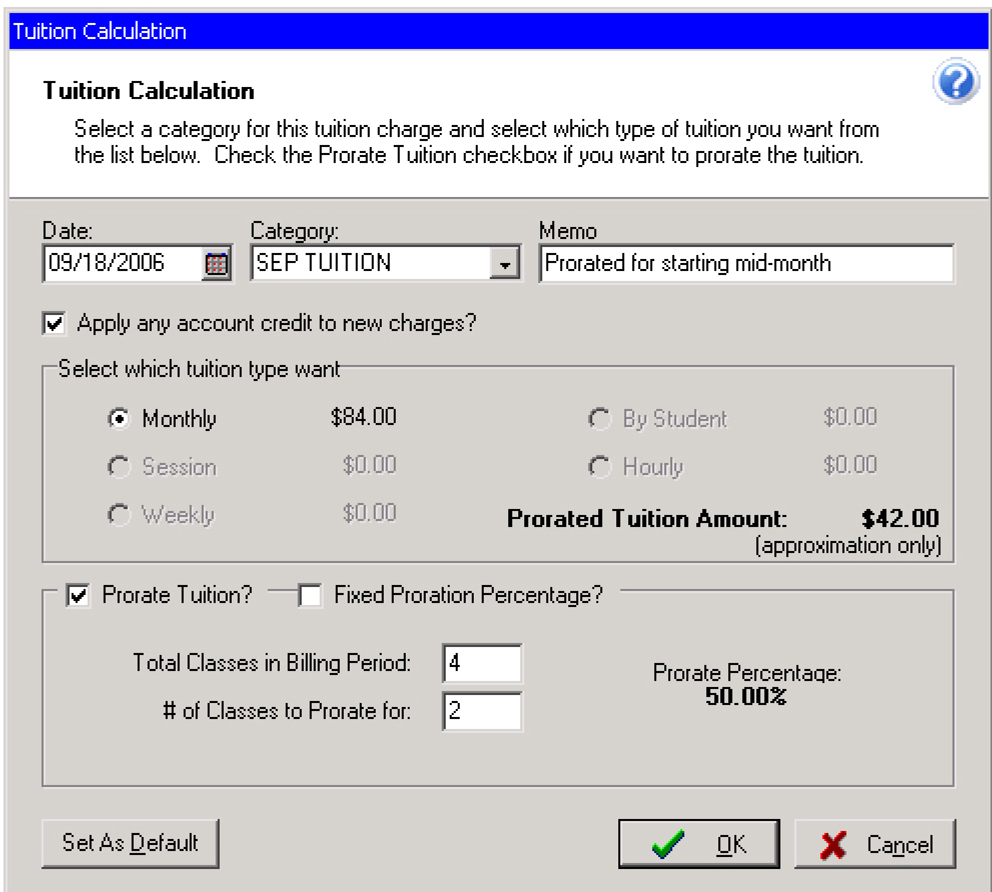
ProSchool lets you calculate and enter a tuition charge for a single family. In addition, you can prorate tuition charges to accommodate situations where a new Client starts halfway through the month (probably the most common example), or for whatever reason you wish to prorate a Client's tuition charge. Proration can be calculated by the number of classes offered vs. the number of classes actually attended by the Student ("4 out of 8", etc.), or on a specific percentage of your choosing. For example, you may run a promotion for new Clients during which the first month's tuition is half-off the normal rate.

It is important to note that when you add a tuition charge this way, the charge you enter—whether prorated or not—is unique to the family currently showing in the Account Ledger panel.

To enter a tuition charge for a single family:

1. Open the **Account Ledger** panel and select the Client for whom you want to enter a prorated tuition charge (as described previously).

2. Click  to open the **Tuition Calculation** window:



3. Select the date, category ("SEP TUITION") and enter a memo if you wish.

4. To apply any existing account credit this Client may have as payment toward this tuition charge, select **Apply any account credit to new charges?**.

Entering and Prorating Tuition Charges for a Single Family

-continued-

5. If you are prorating this tuition charge, you can select the way you want ProSchool to calculate the prorated tuition by selecting either:

- **Prorate Tuition? -** then entering both the total number of classes offered this month, and the total number of classes actually attended this month (or that will be attended) by this Client's Student;
- **Fixed Proration Percentage? -** then enter the percentage amount accordingly.

In the example above, tuition for the month of September has been prorated at 50 percent. In other words, the Client is being charged tuition for only two classes taken, out of four classes offered during the month of September.

A reminder: If you do not wish to prorate tuition, make sure the **Prorate Tuition?** check box remains unchecked.

6. If you have established a specific computation for use every time you prorate tuition, you can click the **Set As Default** button.

7. Click 

to calculate the tuition charge and apply it to this Client's account. The charge will now appear in the **Charges** section of the Account Ledger.

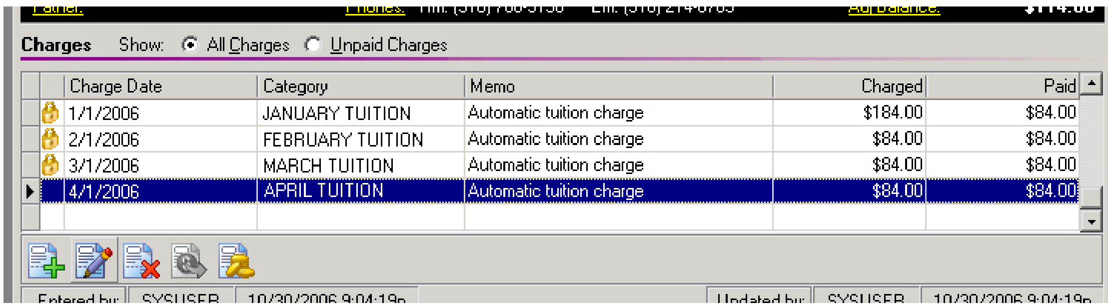
Editing Charges in ProSchool

EDITING CHARGES IN PROSCHOOL

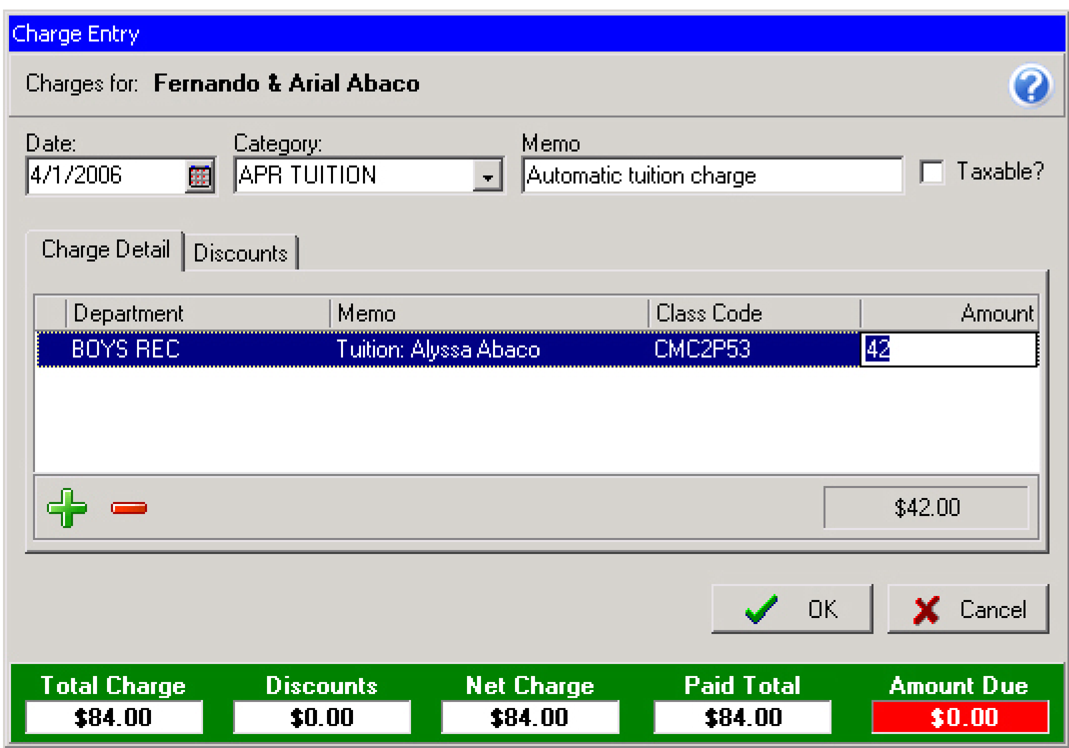
There are occasions when you will need to edit existing charges, such as when a Student cannot attend one or more classes. For example, let's say a Student injures herself and cannot attend the last two weeks of classes in the month of April. The account has already been charged April's tuition, and payment has already been made. We will edit this charge by reducing it by half, and then tell ProSchool what to do with the resulting overpayment amount.

To reduce a charge:

1. Open the **Account Ledger** panel and select the Client you want to enter the charge for. Scroll through the charges until you find the charge you want to reduce, and select it:



2. Click  from within the **Charges** section to open the **Charge Entry** window:



3. Click on the dollar amount in the **Amount** field and change it to the desired amount.

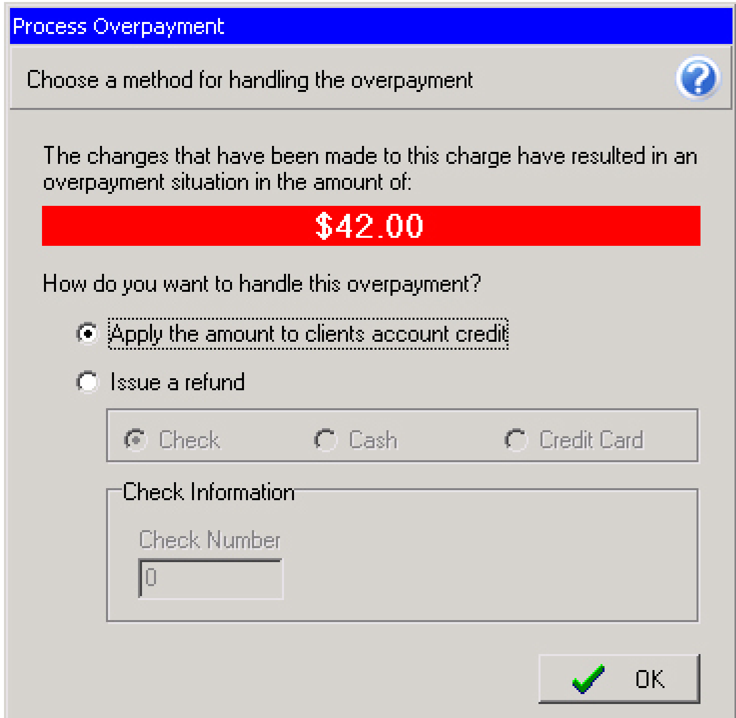
Editing Charges in ProSchool

-continued-

4. Click 

to save the modified amount.

The **Process Overpayment** window opens:



Because ProSchool applies payments to specific charges, reducing a charge that's already paid (as in the example above) results in an overpayment. The **Process Overpayment** window allows you to reconcile the overpayment amount. Note the two options:

- **Apply the amount to client's account credit** – this is usually the best option—assuming the Student is not discontinuing classes, and the Client is an ongoing client—because you can simply apply the credit at a later time, as payment toward other charges.
- **Issue a refund** – this option may be preferable under the following circumstances:
  - the Student is quitting this class, all classes, and / or the Client is leaving your school;
  - the Client specifically requests a refund for the overpayment amount;
  - you have a policy of giving your Clients this option when overpayments occur, and they chose to accept the refund.

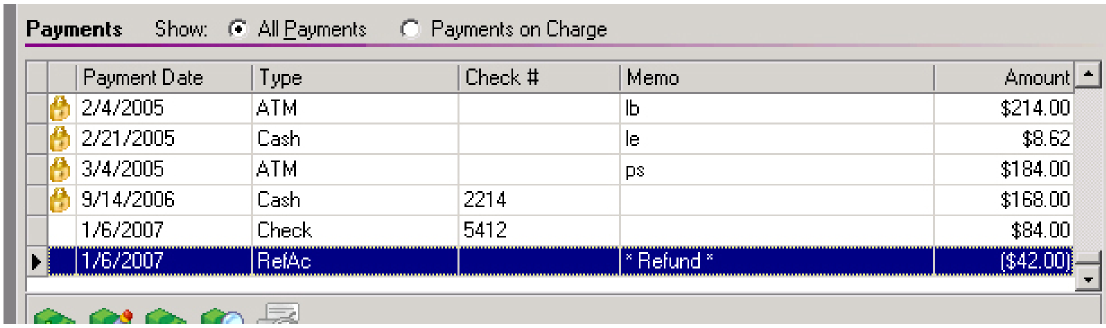
5a. To apply the Client's overpayment amount to their account as a credit, select **Apply the amount to client's account credit** and click 

to complete the process and close the **Process Overpayment** window.

Editing Charges in ProSchool

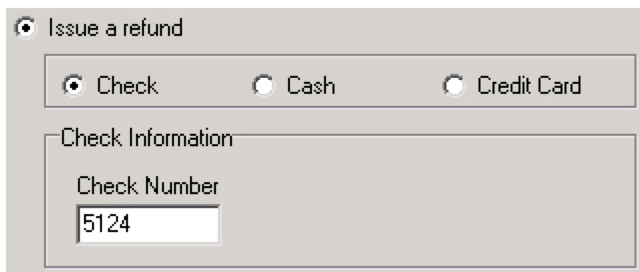
-continued-

The refund appears in the **Payments** section of the ledger:

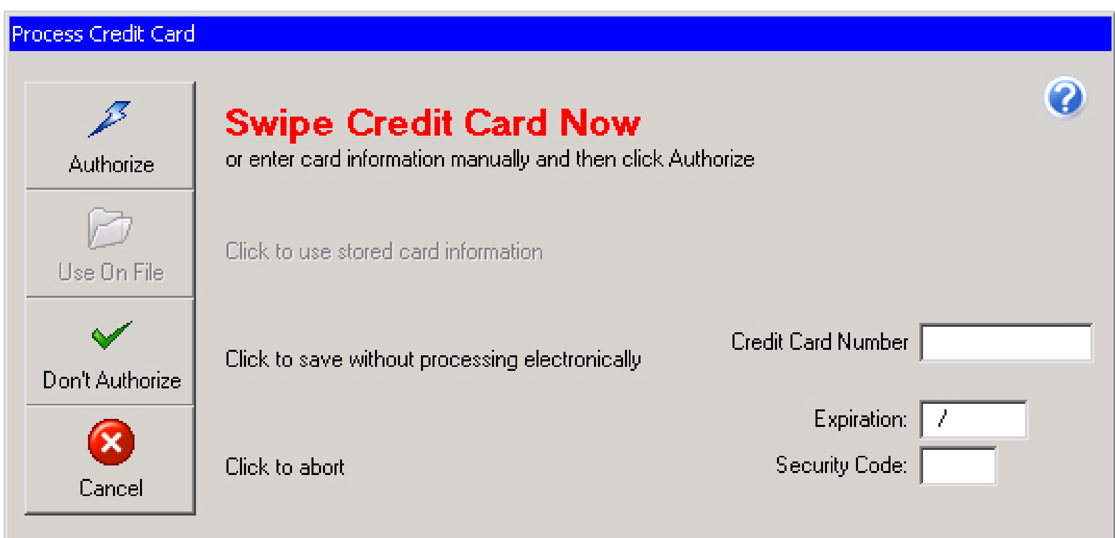


Note the "RefAc" notation in the Type column of this refund. This indicates and confirms that the overpayment amount was refunded *to the Client's refund account* (as opposed to being refunded via check, cash or credit card).

5b. To refund the Client's overpayment amount, select **Issue a refund**. Then, select the form of the refund by selecting **Check**, **Cash**, or **Credit Card**. If you select **Check**, you can enter its number in the **Check Number** field (recommended, to keep your records accurate):



6. Click  to complete the process and close the **Process Overpayment** window. If you selected **Credit Card**, the **Process Credit Card** window opens (otherwise, go to step #7):

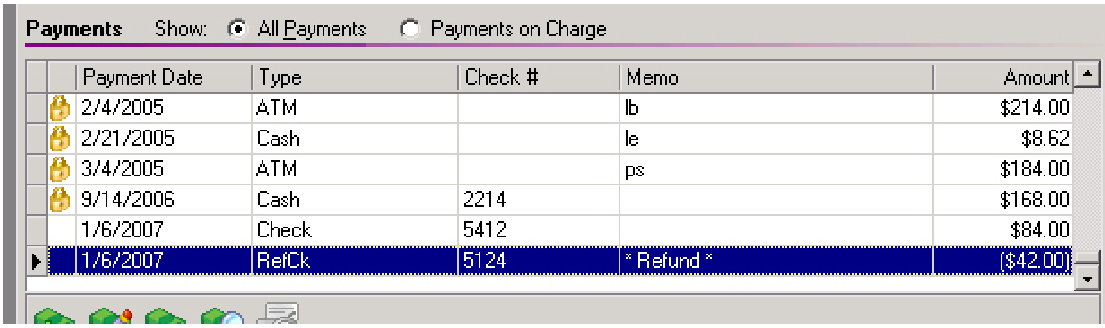


The processing of credit card payments is discussed in detail in the next section entitled, "Entering Payments in ProSchool", beginning on page 252.

Editing Charges in ProSchool

-continued-

7. The credit will appear in the **Payments** section of the ledger—but note the “RefCk” notation in the Type column of this refund:



Payments Show: All Payments Payments on Charge

Payment Date	Type	Check #	Memo	Amount
2/4/2005	ATM		lb	$214.00
2/21/2005	Cash		le	$8.62
3/4/2005	ATM		ps	$184.00
9/14/2006	Cash	2214		$168.00
1/6/2007	Check	5412		$84.00
1/6/2007	RefCk	5124	* Refund *	($42.00)

This indicates and confirms that the overpayment amount was refunded via check, and the check number (as you recorded in an earlier step) is shown to provide an adequate paper trail.

If you refund the amount in cash, the “Type” field entry would be “RefCa”; if via credit card, the entry would read “RefCC”.

Finally, a reminder: the icon (gold lock) indicates a charge to which a payment has already been applied. The opposite is also true; no lock, no payment has been applied. The green locks are only used in the **Payments** section.

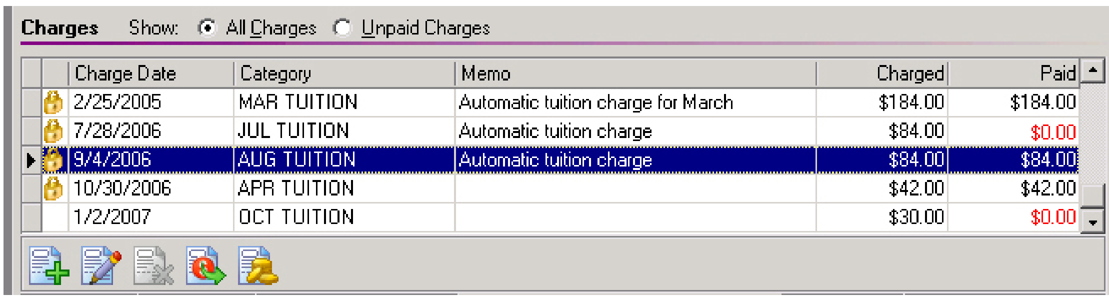
Refunding Charges in ProSchool

REFUNDING CHARGES IN PROSCHOOL

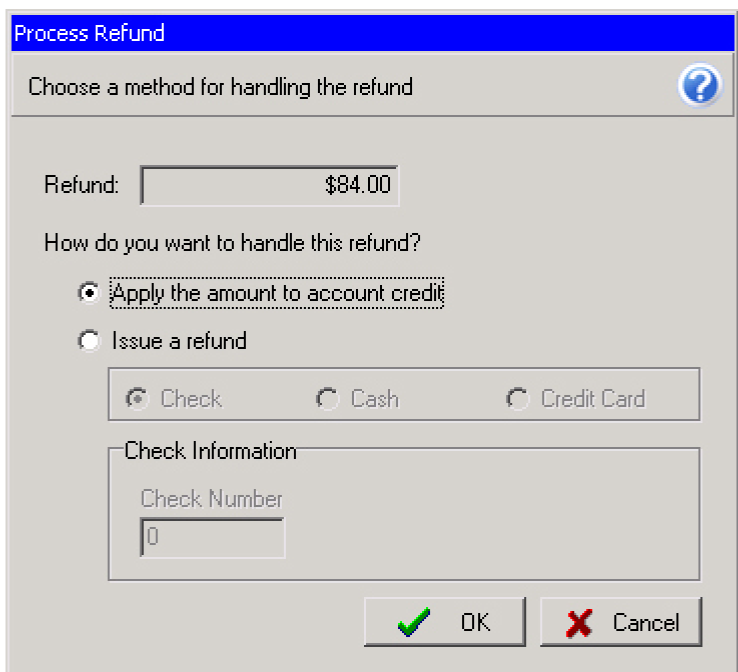
There are times when a payment could be applied incorrectly toward a charge; in other words, the payment should have been entered and applied to a *different* charge than it actually was. To rectify this, ProSchool allows you “refund” the payment from the errant charge (in essence, breaking the association between the payment and that charge). After you do, a credit results—and you then apply that credit toward the *correct* charge.

To refund a charge:

1. Open the **Account Ledger** panel and select the Client for whom you want to refund a charge. Then, select the charge you want to refund by clicking on it:



2. Click  to open the **Process Refund** window:



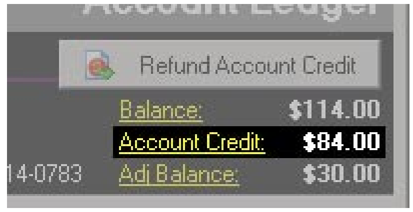
3. Select **Apply the amount to account credit**, then click  to initiate the refund and create the account credit.

Refunding Charges in ProSchool

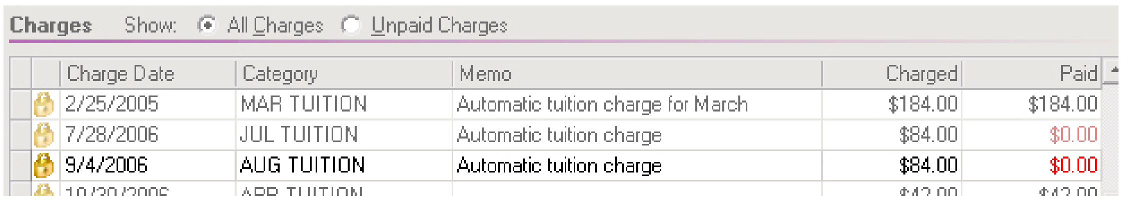
-continued-

At this point, there are three places in the **Account Ledger** panel where this is indicated:

- In the top right-hand corner, as an "account credit":

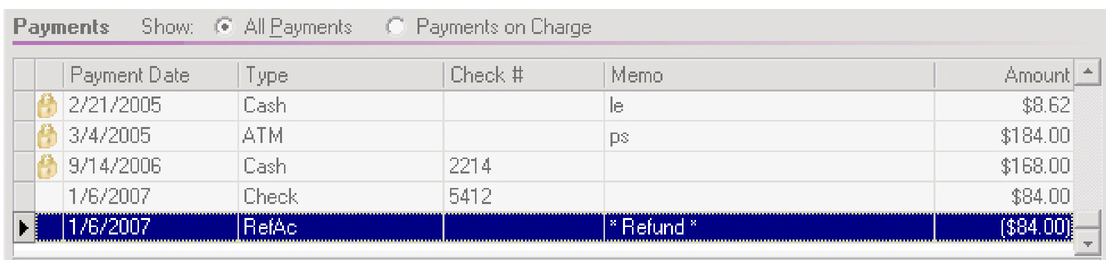


- In the **Charges** section, the charge that was refunded will now show that it is unpaid:



Charge Date	Category	Memo	Charged	Paid
2/25/2005	MAR TUITION	Automatic tuition charge for March	$184.00	$184.00
7/28/2006	JUL TUITION	Automatic tuition charge	$84.00	$0.00
9/4/2006	AUG TUITION	Automatic tuition charge	$84.00	$0.00

- In the Payments section, the refund is now itemized as a refund:

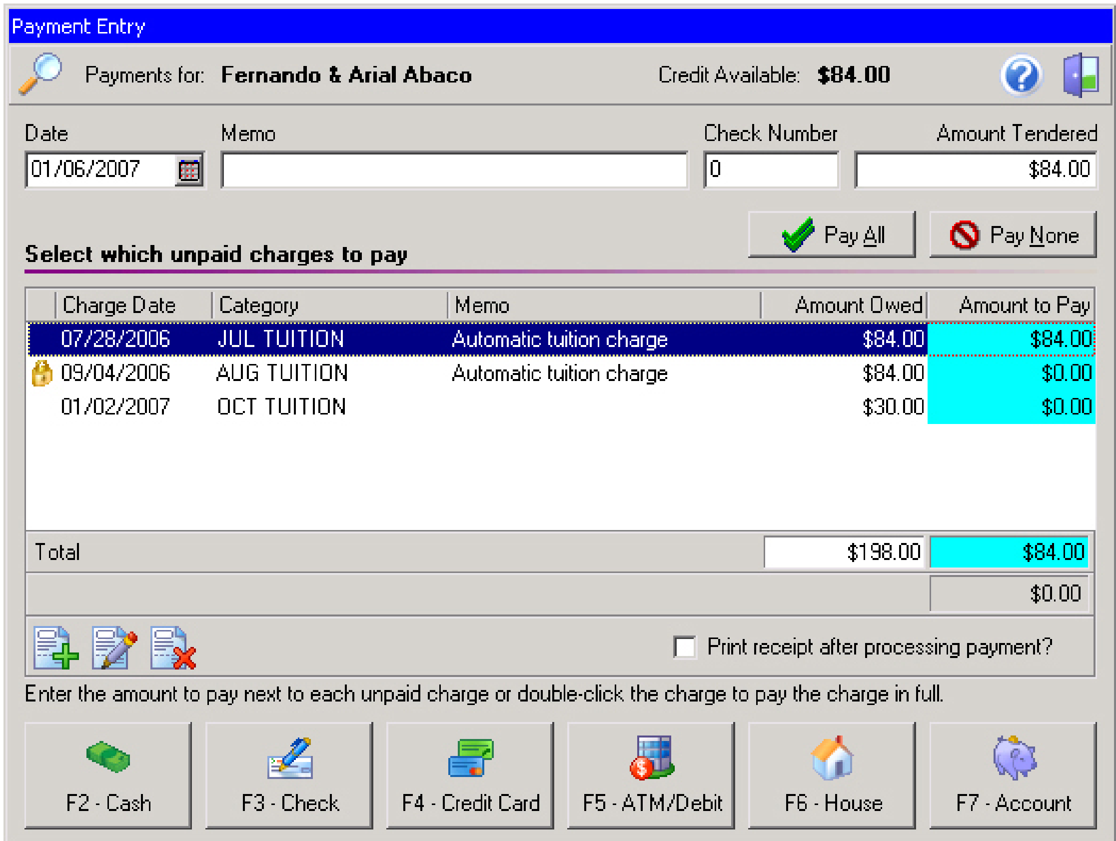


Payment Date	Type	Check #	Memo	Amount
2/21/2005	Cash		le	$8.62
3/4/2005	ATM		ps	$184.00
9/14/2006	Cash	2214		$168.00
1/6/2007	Check	5412		$84.00
1/6/2007	RefAc		* Refund *	($84.00)

Refunding Charges in ProSchool

-continued-

4. To apply this credit toward a specific charge, you simply select the charge as you normally would (described in the next section entitled "Entering Payments In ProSchool"), and click  to open the **Enter Payment** window:



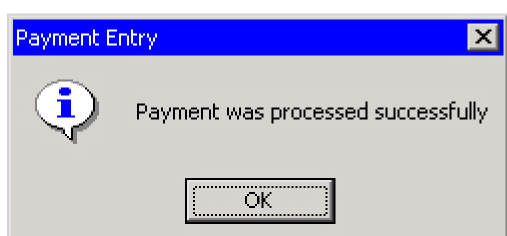
Note that the current amount of this Client's credit balance is shown at the top ("Credit Available:").

5. Select the charge you want to apply this payment to (in this example, the "July Tuition" as shown above).

6. Click 

to apply the account credit as payment toward the selected charge.

As with any other form of payment, ProSchool confirms that the payment has been processed successfully:

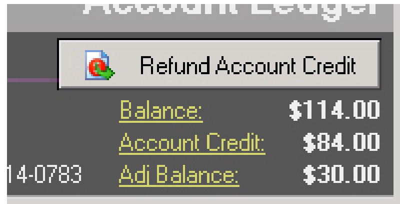


Refunding Account Credits in ProSchool

REFUNDING ACCOUNT CREDITS

Sometimes the need arises to refund an account credit to a Client, such as when they leave your school with an account credit on the books. ProSchool allows you to refund the entire credit amount, or any portion thereof.

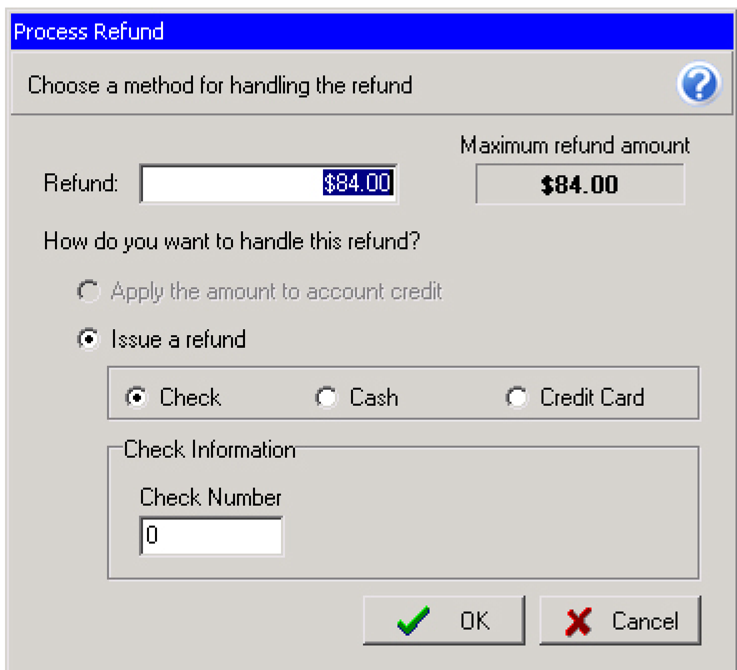
In the previous section you saw how ProSchool indicates an account credit. Let's look again at the upper right-hand portion of the Account Ledger panel and focus on the **Refund Account Credit** button:



This button is always inactive (grayed out) *unless* the Client currently shown in the **Account Ledger** panel has a credit on their account.

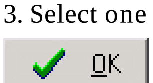
 **To refund an account credit:**

1. Click  to open the **Process Refund** window:



You were introduced to this window in the previous section so it should be familiar, with one exception: the "Apply the amount to account credit" option is grayed out (inactive and unavailable).

2. If you want to issue only a partial refund, change the amount accordingly in the **Refund:** field (the default amount is the total credit owed the Client).

3. Select one of the three refund options, enter a check number (if applicable) and click  to complete the credit credit refund process.

Refunding Account Credits in ProSchool

The refund will be reflected in the Payments section of the Account Ledger panel, as shown in the previous section.

If you chose a partial refund, a credit account balance will still be reflected on this Client's account. To zero out the credit balance, you can enter a charge with an amount equal to the remaining credit balance. This might be the case, for example, if there is a final charge that hasn't been entered yet, and you "hold back" an amount of money from the Client's refund in anticipation of satisfying that final charge.

-continued-

Entering Payments in ProSchool

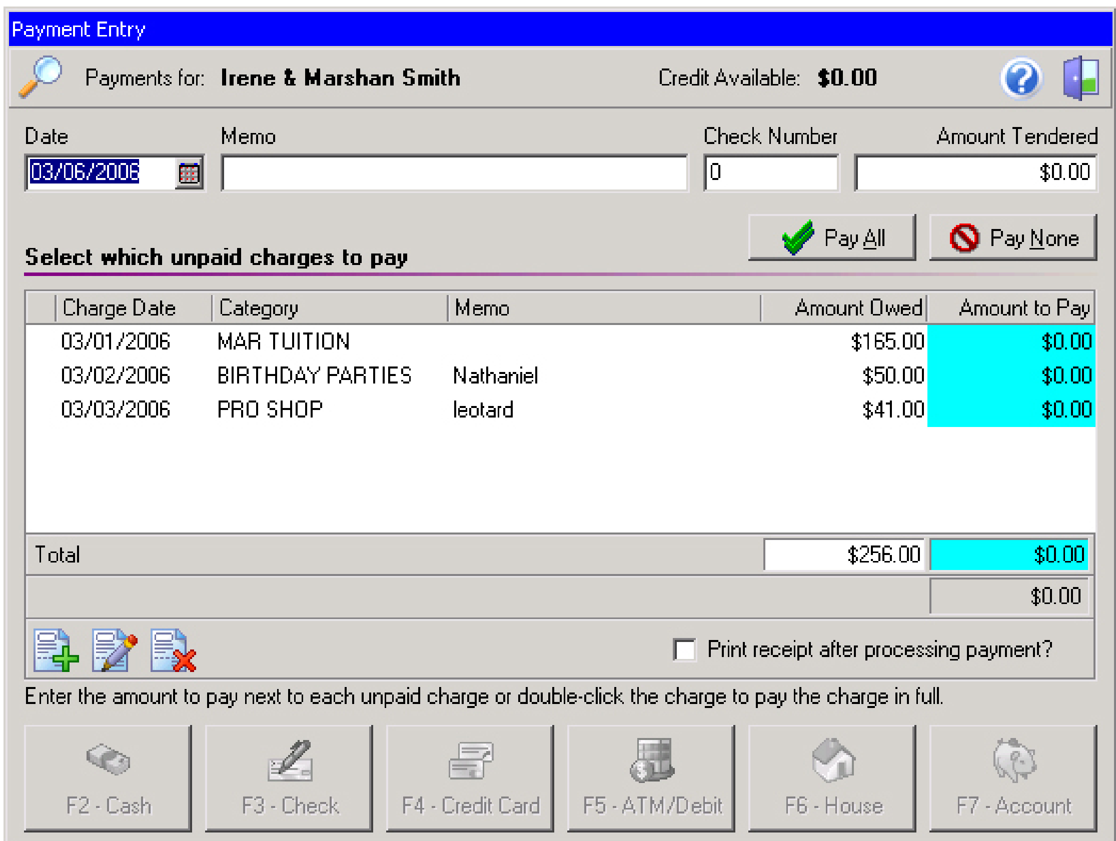
Understanding How ProSchool Applies Payments

In ProSchool, payments are typically attached to specific charges. In other words, when a payment is entered, ProSchool applies that payment—either in part or in full—to specific charges that you previously entered.

For example, let's say the Smiths (the Client), have their daughter Christine (the Student), enrolled in your school. During the month of March—the month for which you are entering charges—Christine purchased a leotard from the Pro Shop. In addition, Mr. and Mrs. Smith used your school's club room facility for Nathaniel's birthday party. The charges you would apply to the Smith's account for the month of March would be as follows:

- March tuition: $165.00
- Pro Shop (leotard purchase): $41.00
- Birthday Party: $50.00

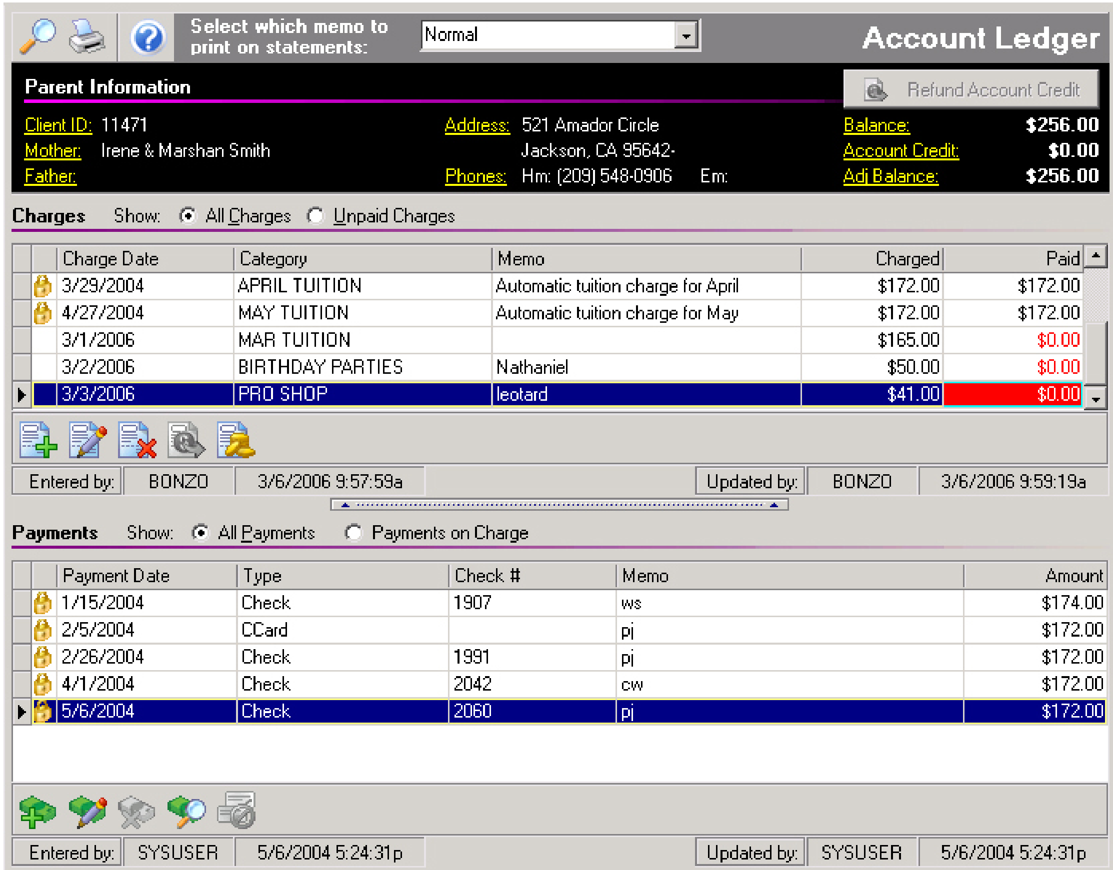
After those charges have been entered, they appear itemized in the **Select which unpaid charges to pay** section of the **Payment Entry** window:



Entering Payments in ProSchool

-continued-

In the **Account Ledger** window, these unpaid charges appear in the **Charges** section (note they are highlighted in red):



In addition, any *overdue* charges that were not paid in full—or at all—during previous billing periods would also appear in the **Charges** section (though there are none in our example). At a glance, you know the specifics and total amount owed by the Client for *all* charges, current or overdue.

Once the Client is informed of the amount owing (via billing or in person at your school office), they would decide the amount they wish to pay. In ProSchool, several payment options are available; which of those you offer your Clients is entirely up to you. We suggest you review the various options carefully to decide which will best suit your school's needs.

After the Client decides how much they wish to pay, the payment details are entered. Then the charges attached to the payment are selected. Finally, ProSchool records those charges as paid.

Entering Payments in ProSchool

-continued-

ENTERING PAYMENTS

Payment entry in ProSchool has always been a simple process. With ProSchool's enhanced electronic payment processing features in concert with PCCharge, you'll find it easy to offer the entire spectrum of payment options to your Clients.

To enter payments in ProSchool:

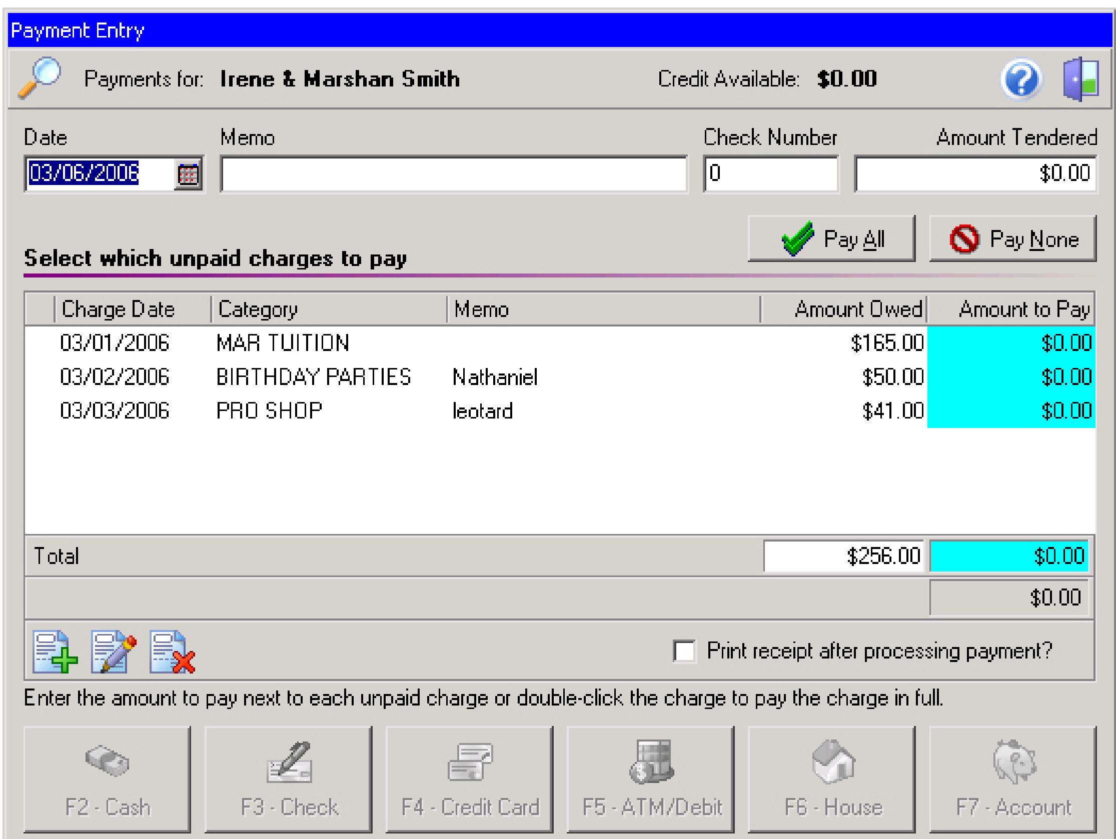
1a. In the main menu bar, click the **Billing** pull-down menu and select **Payment Entry / Quick Entry** to open the **Search for a Client** window (explained in earlier sections).

1b. Select the Client for whom you want to enter a payment, then click OK to open the **Payment Entry** window (shown immediately below).

OR...

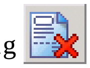
2a. In the **Account Ledger** view (shown on the previous page), make sure the name of the Client who's making the payment is selected (if not, click to find the right Client).

2b. With the correct Client showing, click (in the lower part of the **Payments** section) to open the **Payment Entry** window:



3. If you need to edit a specific charge, or just review its details, you can easily do so from this window; select the charge and click to open the Charge Entry window (explained in a previous section). You can modify the charge, or make no changes at all.

If you *do* make changes, they'll update immediately and will be reflected in the amounts on the **Payment Entry** window.

4. You can also delete a specific charge by selecting it and clicking  to do so. The customary confirmation window will appear, allowing you to confirm and complete the deletion, or abort the deletion attempt.

5. If you want ProSchool to generate a receipt of the payment for the Client, select **Print receipt after processing payment**.

6. Enter a memo if you'd like, and the check number (if payment is being made by check) in the appropriate **Memo** and **Check Number** fields.

There are four payment scenarios that could unfold depending on how much the Client wishes to pay toward the charges owing—AND, depending on how many of these payment options you choose to offer your Clients. The various options are as follows:

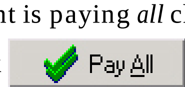
- ***full*** **payment** equal to the total amount of all charges owing ($256 in the example window shown below);
- ***even*** **partial payment** – where the Client's payment amount is equal to the total of *some* of the charges owing (such as paying $215, the exact total of the first two of the three charges in our example);
- ***uneven*** **partial payment** – where the payment amount is *not* equal to any one charge nor any combination thereof (such as paying a "round" amount such as $240—an amount in excess of the first two charges in our example *but not equal to* the total of all three charges);
- ***excess*** **payment**, in which the customer pays more than the total amount owing, such as $300, perhaps in anticipation of future charges (like an "advance" payment).

Hint: To keep things simple—or to keep charges and payments evenly matched—you may wish to offer your Clients only the first two payment options ("full" payment or "even partial" payment).

We suggest you experiment with the above payment types *before* deciding which payment options to offer your Clients. That way you will better understand the procedural implications for each. You can experiment by using a dummy Client account, or add fictitious payments to a real Client's account—but if you do so, just remember to delete the fictitious payments you enter when you're done!

7. Enter the total amount of the Client's payment in the top-right **Amount Tendered** field.

8. In the right-most **Amounts to Pay** column of the **Select which unpaid charges to pay** section, enter the amount the Client is paying against each charge. If the Client is paying a given charge in full, you can double-click on that charge to enter its full amount.

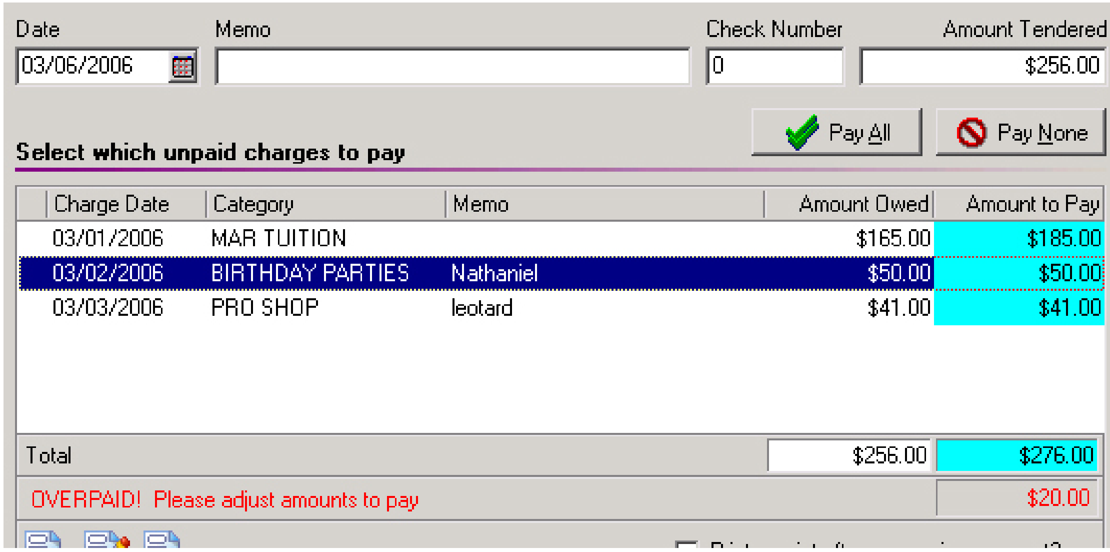
If a Client is paying *all* charges off in full (that is, bringing their account to a zero balance), you can click 

and ProSchool will enter all the payment amounts in full.

Entering Payments in ProSchool

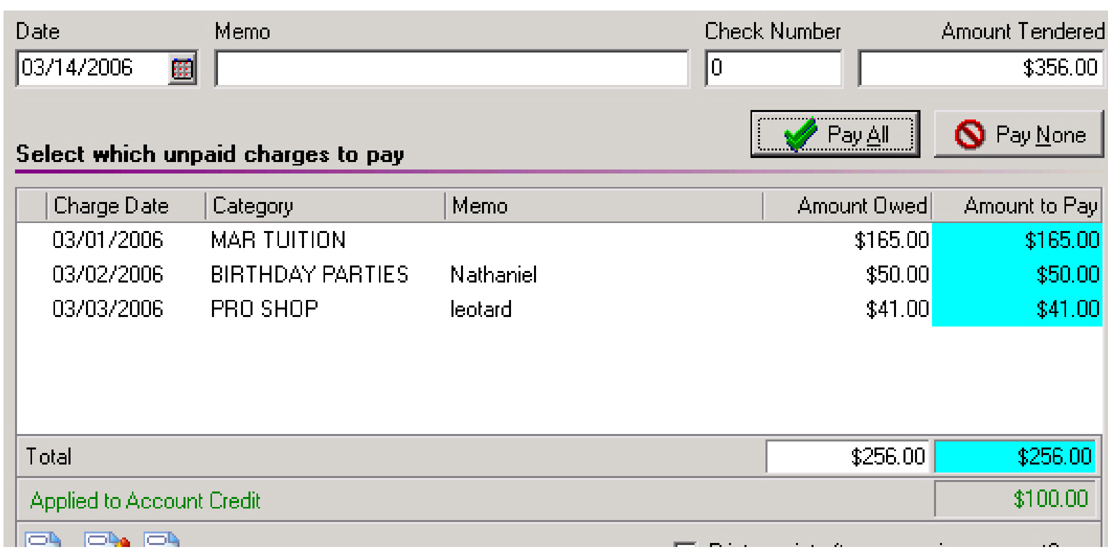
-continued-

Here's the key: Regardless of the payment type you utilize, the cumulative total (sum) of all amounts entered in the **Amounts to Pay** column must not be greater than the amount shown in the **Amount Owed** column. If it *is* greater, ProSchool will indicate this:



When you correct the problem, the error message in red will disappear.

If the Client wants to pay an amount *in excess* of the cumulative total of the amounts entered into the **Amount to Pay** column, ProSchool considers the excess payment as an account credit. For example, using the account shown above, let's say the Client wishes to pay off all charges, *plus* an additional $100 (that is, over and above the total due) in anticipation of future charges. The window would then look like this:

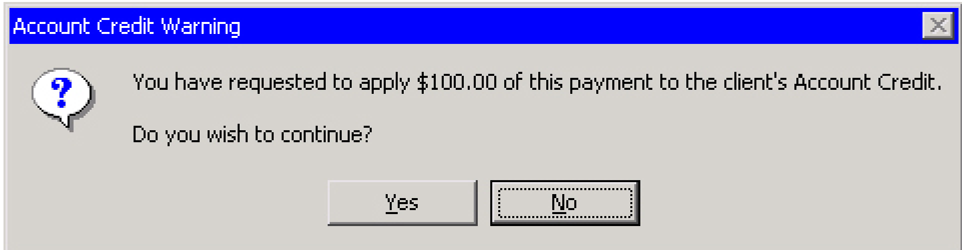


The notation **Applied to Account Credit** and the amount ($100.00) appear in green as shown above.

Entering Payments in ProSchool

-continued-

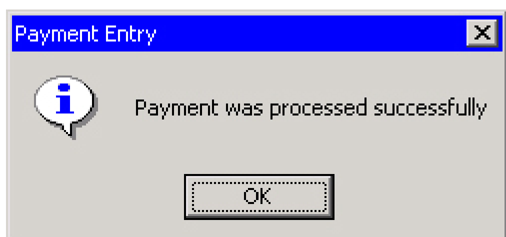
Then, when you select a payment method, the following message appears to confirm your intentions:



If you intended to accept this payment and create this account credit, click **Yes** to continue with the payment process; otherwise, click **No** to return to the **Payment Entry** window and make the desired changes.

Note the large payment type buttons along the bottom of the **Payment Entry** window. After you have assigned payment amounts to the charge(s), the buttons become active (except for the right-most button, which we'll cover in a moment):

9a. To take payment in the form of cash or check, click the **F2 - Cash** or **F3 - Check** button, as appropriate. ProSchool processes the payment and confirms it:



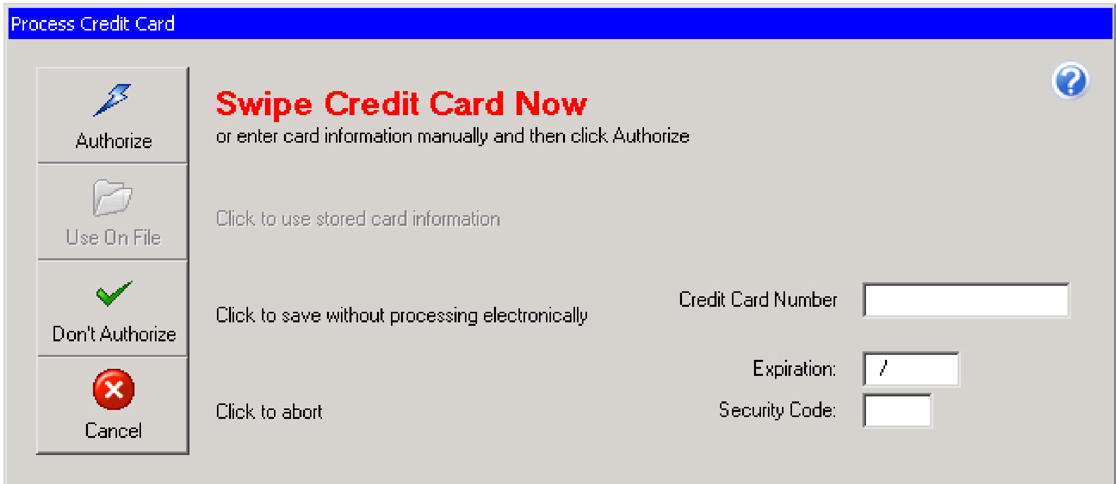
9b. To take credit card and ATM / debit card payments if you are not PCCharge-enabled, click the **F4 - Credit Card** or **F5 - ATM/Debit** buttons, as appropriate. The confirmation above will appear.

If you *are* PCCharge-enabled to accept credit card and ATM/debit card payments, continue to step #10; otherwise, proceed to step #12

Entering Payments in ProSchool

-continued-

10a. If the Client is paying with a credit card (*not* an ATM / debit card), click the **F4 - Credit Card** button to open the **Process Credit Card** window:



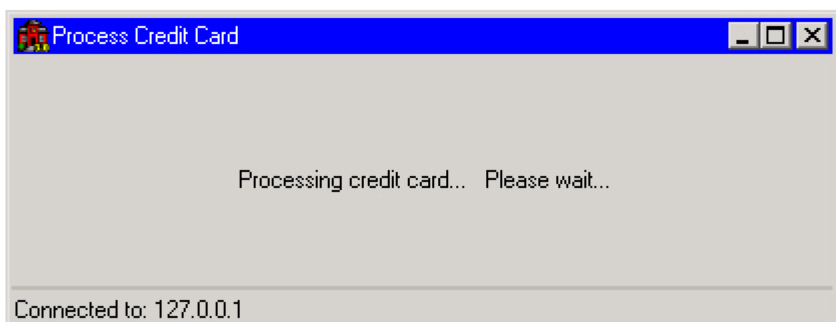
10b. Swipe the credit card in your reader to initiate the authorization process...

OR...

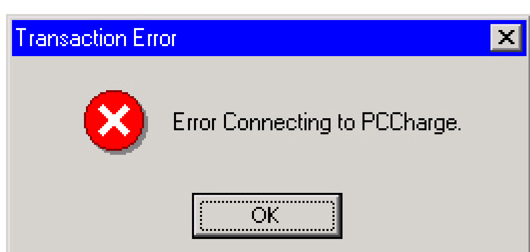
Enter the credit card info in the appropriate fields and then click 

to initiate the authorization process manually.

10c. during authorization, the following message appears:



If there is an error connecting to the PCCharge software, the following message will appear:



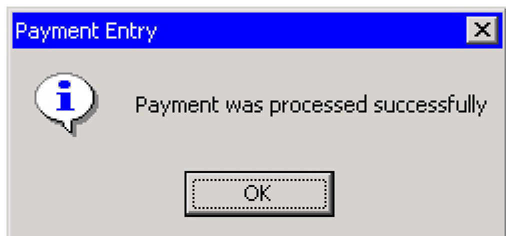
If this happens, try the process again; however, if this message persists, it is likely an indication that your TCP / IP settings are not correct, and that you will need to reconfigure it as outlined in the earlier section entitled, "Setting Up ProSchool's Online Credit Card Processing" which begins on page 44.

When authorization is complete, the following confirmation window appears:

Click **OK** to acknowledge the confirmation and close the window.

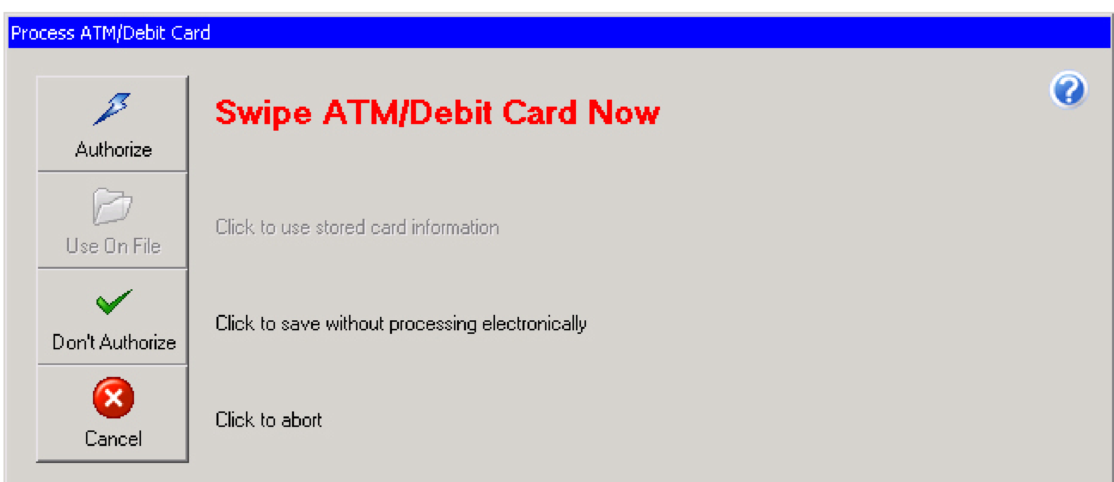
10d. If you *don't* want to run this credit card transaction through for authorization at this time, click 

to apply payment to the Client's account, and save the credit card information for processing at a later time. The confirmation window appears:



10e. Click **OK** to confirm payment, close the Payment Entry window and return to the main **Account Ledger** screen. Note that this option processes the payment internally (within ProSchool) for the purposes of applying payment to this Client's account, **but that the actual transaction processing will still need to be done at a later time so that you will actually receive the funds for this transaction.**

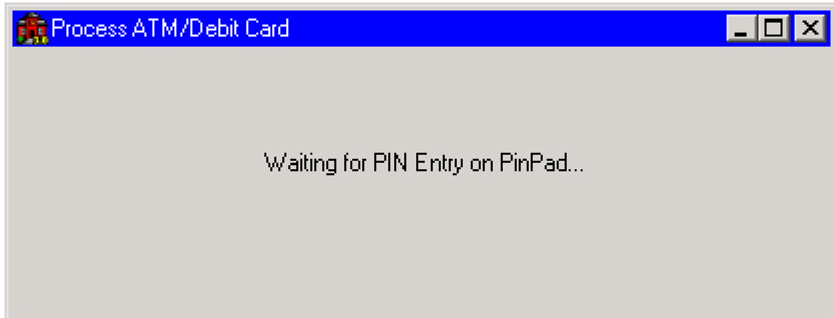
11a. If the Client is paying with an ATM / debit card (*not* a credit card), click the **F5 - ATM Card** button to open the **Process ATM/Debit Card** window:



Entering Payments in ProSchool

-continued-

11b. Swipe the ATM / debit card in your reader to initiate the authorization process. The customer will be prompted for their PIN number. You will see the following screen (the customer's PinPad will also prompt them for their PIN at the same time):



If there is a problem initializing the PIN pad or a communications error, the following message appears:

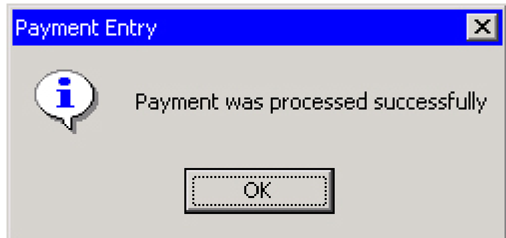
If the PIN is not captured correctly, the following message will appear:

If this happens, cancel the transaction and try again. If this problem persists, double-check the PinPad communications set up as explained earlier in the section entitled, "Setting Up ProSchool's Online Credit Card Processing" which begins on page 44.

When the PIN is entered correctly, the transaction proceeds. When approval is received, the following message appears:

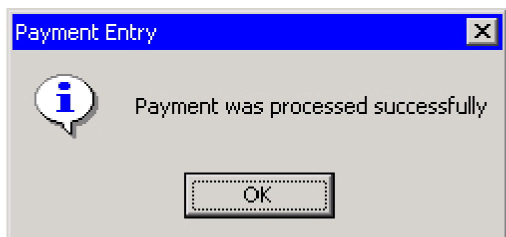
11c. If you *don’t* want to run this ATM / Debit card transaction through for authorization at this time, click 

to apply payment to the Client’s account, and save the ATM / Debit card information for processing at a later time. The confirmation window appears:



11d. Click **OK** to confirm payment, close the Payment Entry window and return to the main **Account Ledger** screen. Note that this option processes the payment internally (within ProSchool) for the purposes of applying payment to this Client’s account, **but that the actual transaction processing will still need to be done at a later time so that you will actually receive the funds for this transaction.**

12a. If the Client wants to apply a **house credit** as payment, click **F6 - House** to do so. ProSchool processes the payment and a confirmation window appears:



NOTE: The monetary value of this “house” credit is not recorded or tabulated by ProSchool. Rather, this payment option is designed to accommodate house credits that are issued in the form of a coupon or voucher. Therefore, ProSchool has no way of knowing what the actual value of the house credit is, outside of the coupon or voucher itself. Therefore, it is strongly suggested that when such forms of payment are accepted and processed, the actual payment instrument (coupon, voucher, etc.) is surrendered just as if it were cash, and placed in the till accordingly so you or your bookkeeper can reconcile it correctly.

12b. Click **OK** to close the Payment Entry window and return to the main **Account Ledger** screen.

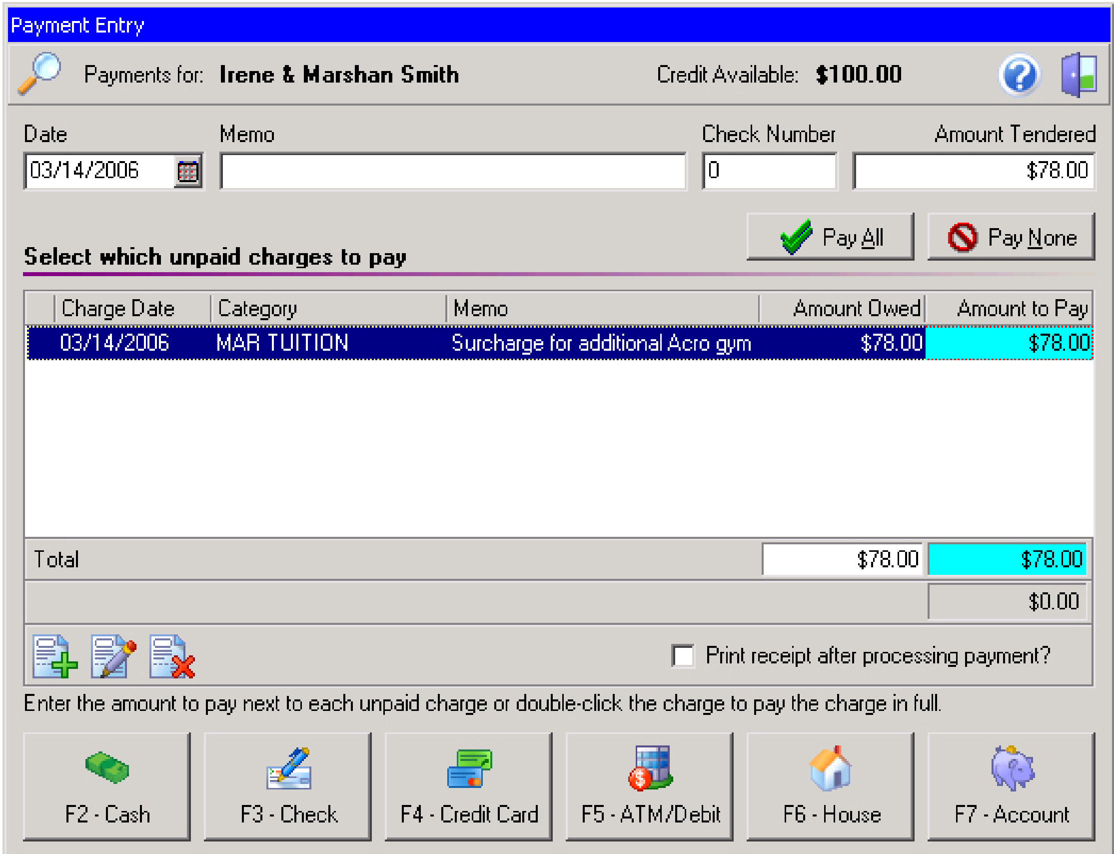
Let’s review the payment methods again:

Note that the far right **F7 - Account** button is inactive (grayed out). This indicates that the client does not currently have any account credit available, *or* that the payment info that has been entered thus far does not allow this option to be selected yet.

Entering Payments in ProSchool

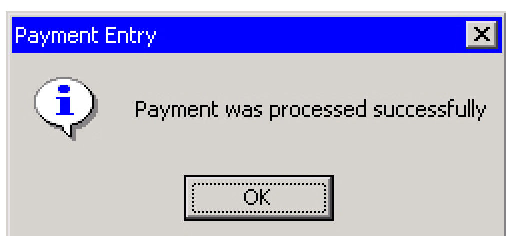
-continued-

In the example above we processed a $100.00 extra payment as an account credit. Let's say we added an additional charge of $78 to that account. The **Payment Entry** window would then look like this:



Note the notation in the top right part of the window "Credit Available: **$100**". ProSchool always lets you know if current Client has an account credit available. Secondly, note that the **F7 - Account** button in the bottom right-hand corner is now active.

13. To apply an **account credit** as payment (as shown above), click **F7 - Account** to do so. ProSchool processes the payment and a confirmation window appears:

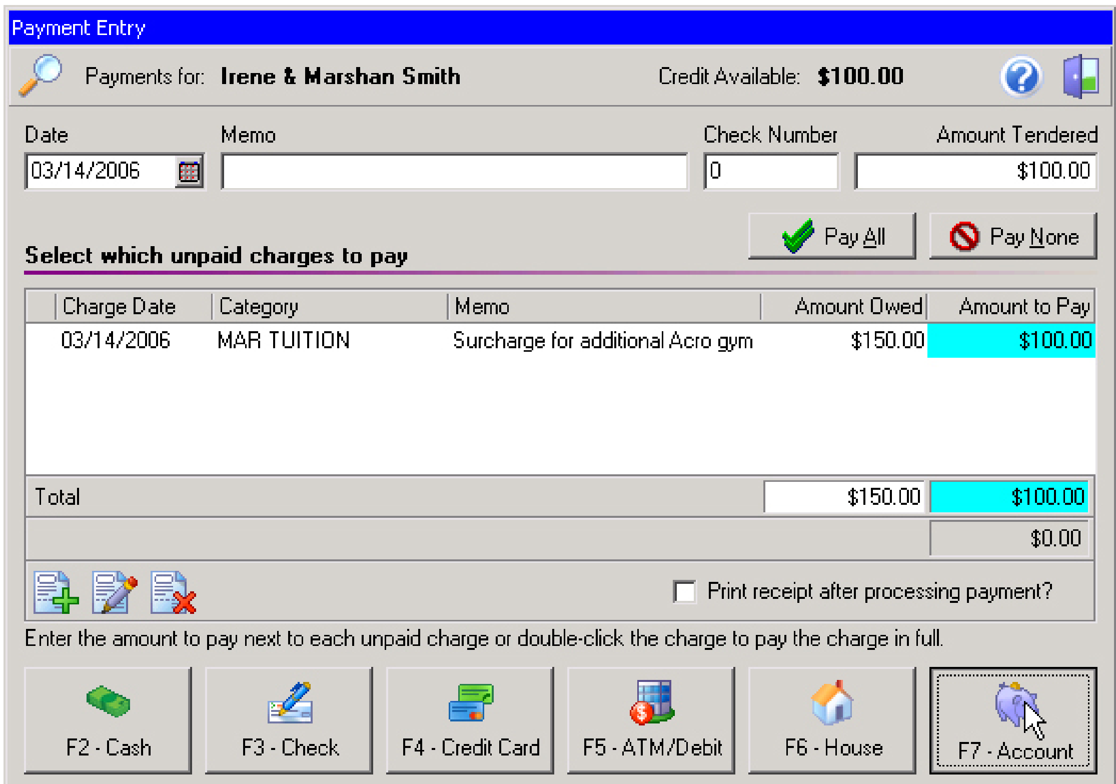


Entering Payments in ProSchool

-continued-

Next time the **Payment Entry** window is opened, the remaining credit for this Client ($100-$78=$22) will be displayed at the top:

14a. If the available account credit is *less* than the total payment amount the Client wants to make, you would accomplish this with two payments. The first payment would be in the amount of the credit ($100) and would appear as follows in the **Payment Entry** window:

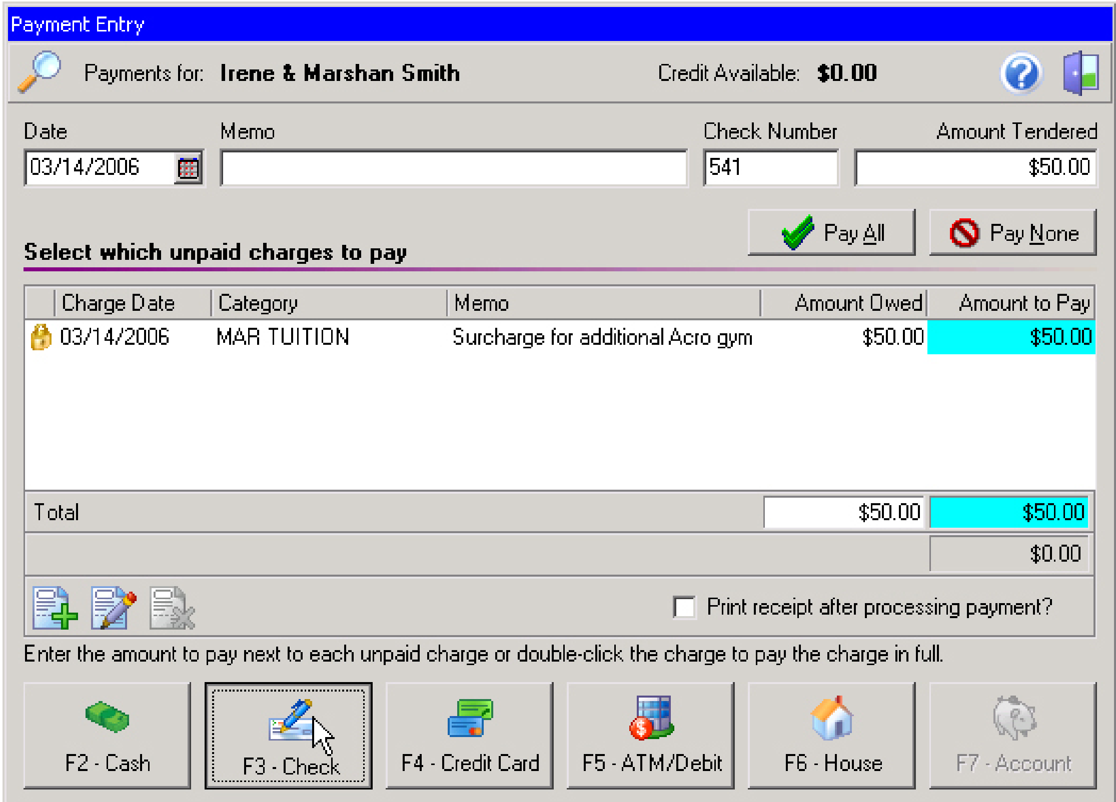


14b. After entering $100.00 in both the **Amount Tendered** and **Amount to Pay** fields, click **F7 - Account** to process the payment. The customary confirmation window will appear (click **OK** to close it).

Entering Payments in ProSchool

-continued-

14c. Then, open the **Payment Entry** window again to pay the remaining balance of the charge:



Notice that the remaining credit shown at the top of the window is now at a zero balance ("$0.00").

14d. You'll enter the amount of $50.00 into both the **Amount Tendered** and **Amount to Pay** fields, then click **F3 - Check** (in the example above) to process the payment. The customary confirmation window will appear (click **OK** to close it).

ProSchool makes it quick and easy to do, and keeping the two transactions separate keeps the bookkeeping nice and orderly (which is a benefit you'll come to appreciate if you ever need to audit your books or research this transaction in the future).

A reminder regarding the locks: The icon (green lock) indicates a payment that has been posted in the payment posting process. Payments with a green lock CAN be deleted, if you need to do so. The icon (gold lock) indicates a payment that has been transferred to QuickBooks® and **cannot be deleted**.

Posting Payments in ProSchool

POSTING PAYMENTS

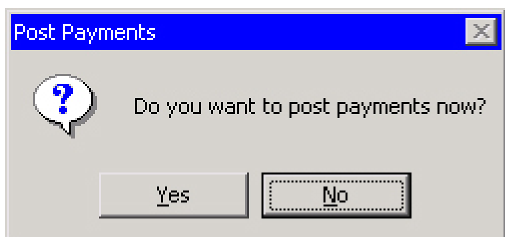
Posting Client payments completes ProSchool's billing and payment cycle. In ProSchool, the posting of payments simply assigns a time / date stamp to all payments received within the posting period you establish (daily, biweekly, weekly). If you post weekly on Fridays, for example, all payments received during the course of the week will bear Friday's posting date. This is the "paid" date that will be reflected in reports such as Gross Income Summary and Income / Billing Summary.

The recommended way to post payments in ProSchool is to print the Payment Receipts Log report. After this report is printed, ProSchool automatically asks if you want to post payments. The report gives you an opportunity to review payments received, *prior* to posting, so it's a good practice.

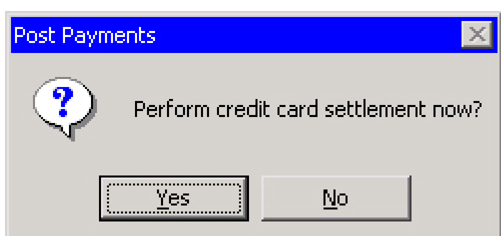
To post payments using the Payment Receipts Log report:

1. Print out the Payment Receipts Log report (as described in the ProSchool Reports section which follows). Note that you can print a "preview" report if you want to review payments on-screen that are waiting to be posted, but do not need a hard copy of the report.

After the report is generated (either printed or on-screen), the following confirmation dialog appears:



2. Click **Yes** to post payments. When payments complete posting, this message will appear (if you have enabled PCCharge):



If you click **No**, ProSchool confirms that payments were posted:

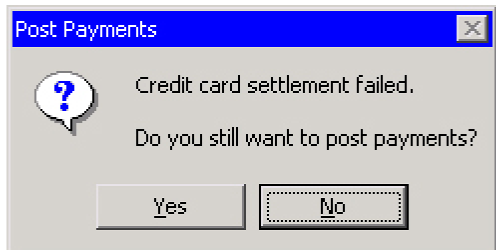
If you click **Yes** to perform credit card settlement, ProSchool connects to your merchant services provider via PCCharge and initiates the settlement process.

Posting Payments in ProSchool

-continued-

After ProSchool successfully performs the credit card settlement process, the following message appears:

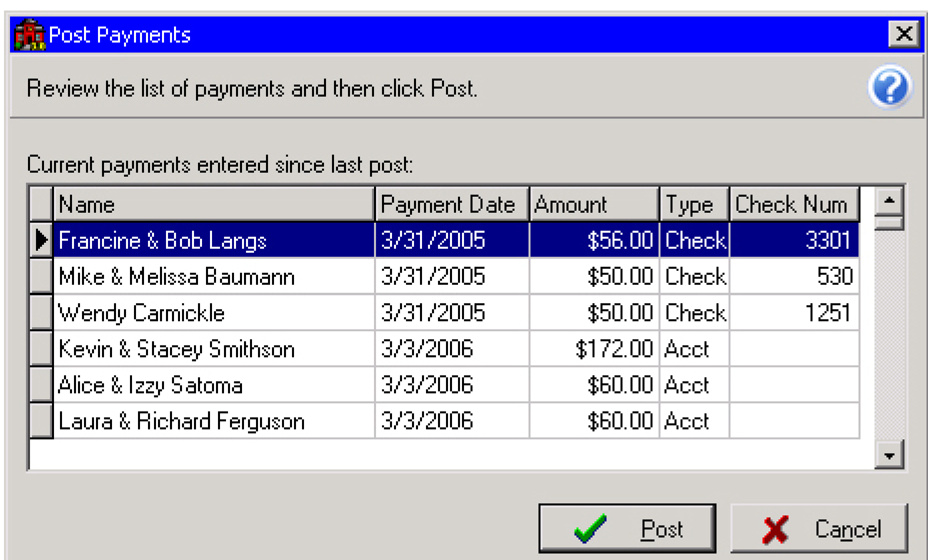
If, however, ProSchool has problems with the settlement process and cannot perform the settlement, this message appears:



If you click **Yes**, ProSchool posts payments anyway and confirms it has done so with the confirmation message (shown previously, above). If you click **No**, the process is halted, and no payments have been posted. (You will still need to post them at a later time.)

To post payments using the "alternative" method:

1. Click on the **Billing** pull-down menu on the main button bar to open the **Post Payments** window:



2. The section, **Current payments entered since last post**, will list all payments that have been entered into ProSchool since the last time payments were posted.

3. Click on **Post** to post all payments listed. The remaining dialog boxes and messages will display as shown above.

Processing Deposits and Transactions

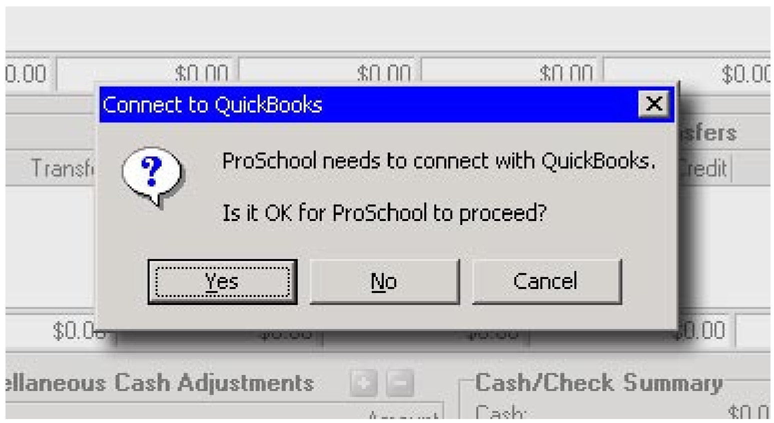
-continued-

PROCESSING DEPOSITS & TRANSACTIONS

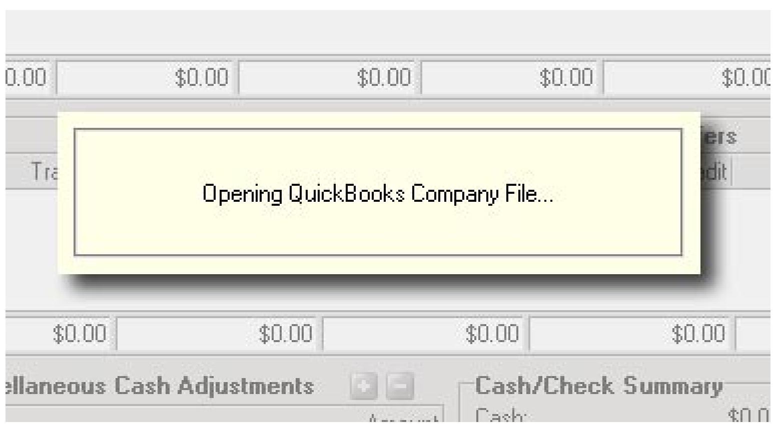
After you have posted payments in ProSchool, you are ready for the final step: processing your deposits and transactions. This is a very important procedure, because this is how ProSchool transfers your income (receivables) over to the appropriate income accounts in QuickBooks®.

To process deposits and transactions:

1. Click on the **Billing** pull-down menu on the main button bar and click **Process Deposits/ Transactions...** to open the **Process Deposits and Transactions** window. The window will open, but this message will appear on top:



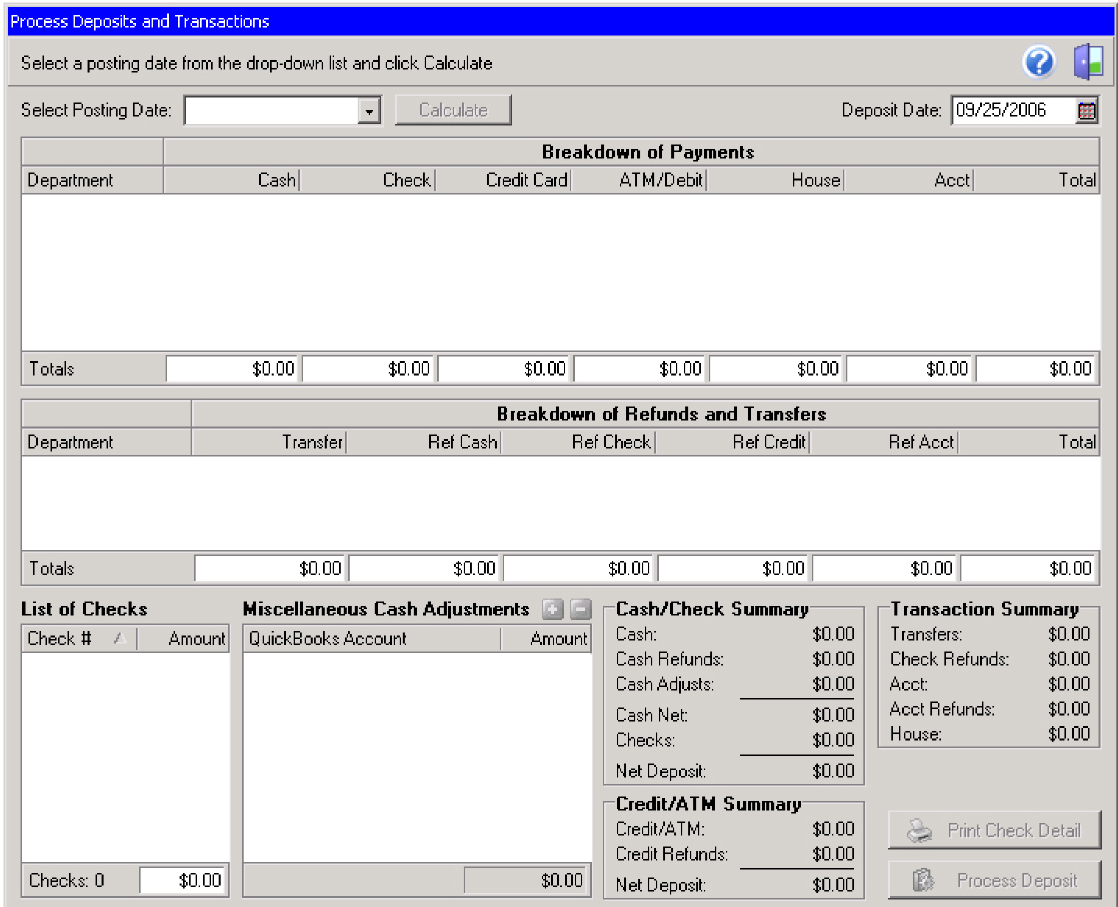
2. Click Yes to initiate the connection to QuickBooks®. A status indicator will appear:



Processing Deposits and Transactions

-continued-

After a few moments, the above status indicator will disappear and reveal the full **Process Deposits and Transactions** window (the fields will be populated with totals in the next step):



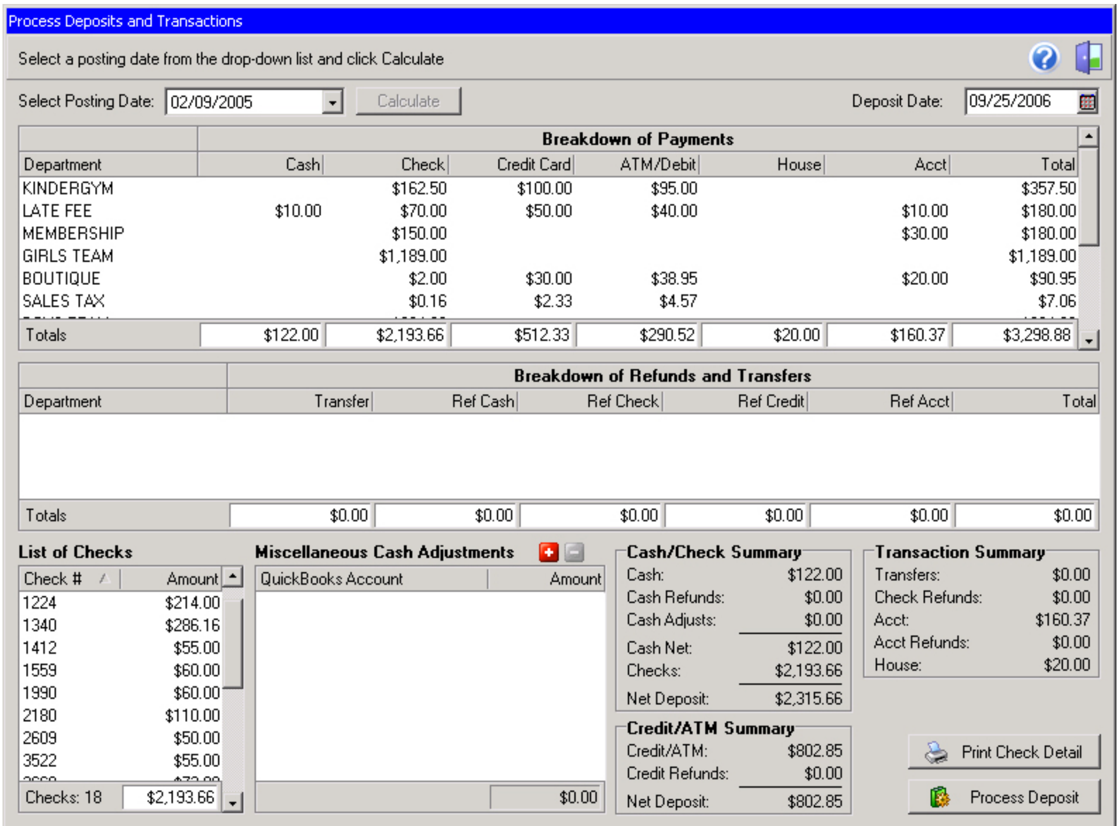
3. Use the **Select Posting Date:** drop-down menu (upper left-hand area) to select the posting date you want to process. Note: All transactions and deposits posted on the posting date you select, and *only* those (i.e. none from other posting dates) will be processed in the next step. If you want to process transactions and deposits for two separate posting dates, you will simply repeat this process for the second posting date.

4. Click Calculate to initiate the calculation process.

Processing Deposits and Transactions

-continued-

All appropriate fields will populate with totals:



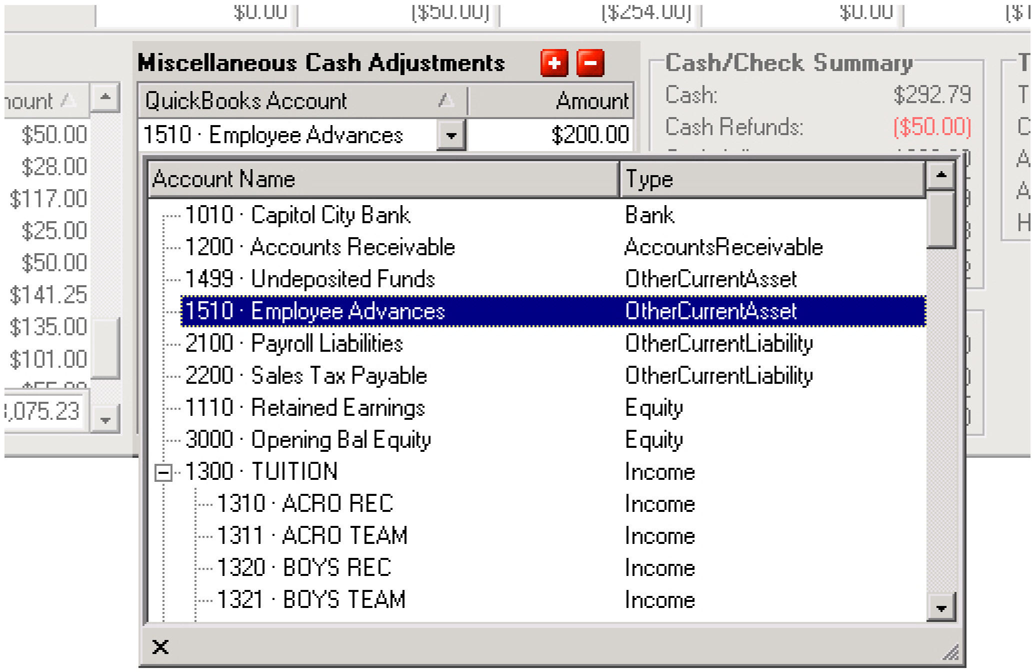
Take a moment to familiarize yourself with this page's key sections (subtotals, itemized checks panel, Cash / Check Summary, Transaction Summary fields and total deposit amount, etc.).

5. Enter miscellaneous cash adjustments you have (if any) into the **Miscellaneous Cash Adjustments** section by clicking for every entry. You'll note that the **QuickBooks Account** drop-down menu accesses the account titles directly from QuickBooks®. Select the appropriate account and the amount (or to delete an entry).

Processing Deposits and Transactions

-continued-

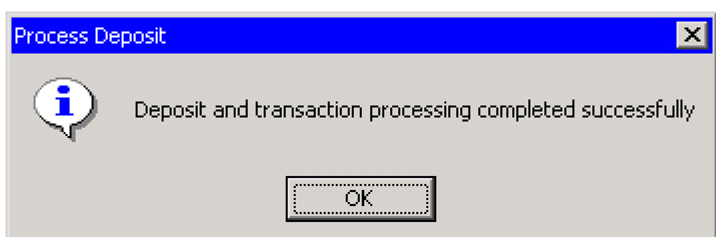
Here's an example of a cash advance for an employee for $200:



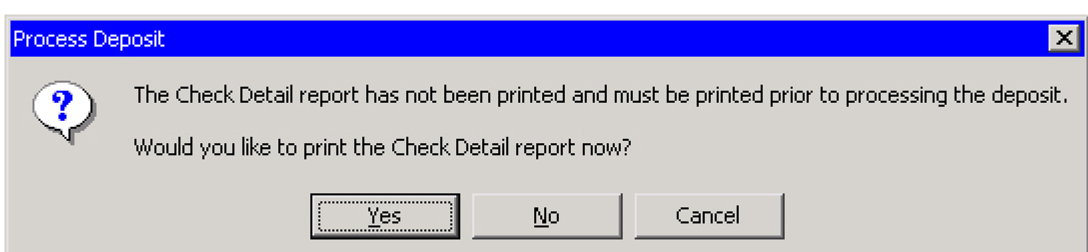
6. Choose the actual date of the deposit (that is, the date on which you will take it to the bank) by using the **Deposit Date:** calendar.

7. Click [Print Check Detail] to print a detailed listing of all checks included in this deposit.

8. Click [Process Deposit] to process the transactions and deposits for the selected posting date. If you have already printed the "Check Detail" report (previous step), ProSchool will transfer the proper amounts to the appropriate accounts in QuickBooks®, then the following confirmation message will appear:



Otherwise, the following message will appear:

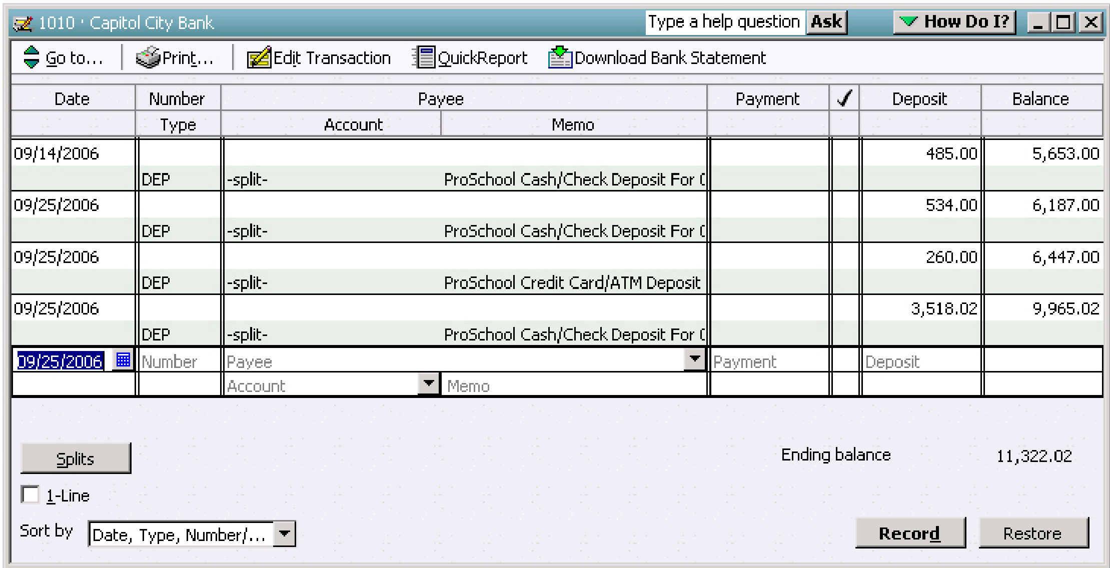


Processing Deposits and Transactions

-continued-

You have the option of continuing without printing a check detail report (click **No**), but in accordance with generally accepted bookkeeping practices, it is customary to do so—just click **Yes** to generate the report. ProSchool will then print it and continue processing the amounts to the appropriate accounts in QuickBooks®. A confirmation message will appear (as described and shown above).

9. The deposited amount from ProSchool will show up in the QuickBooks® check register:



Several deposits are shown above (cash / check and credit card / ATM) to give you a sense for how they appear in QuickBooks®.

Using ProSchool's Resource Planner

-continued-

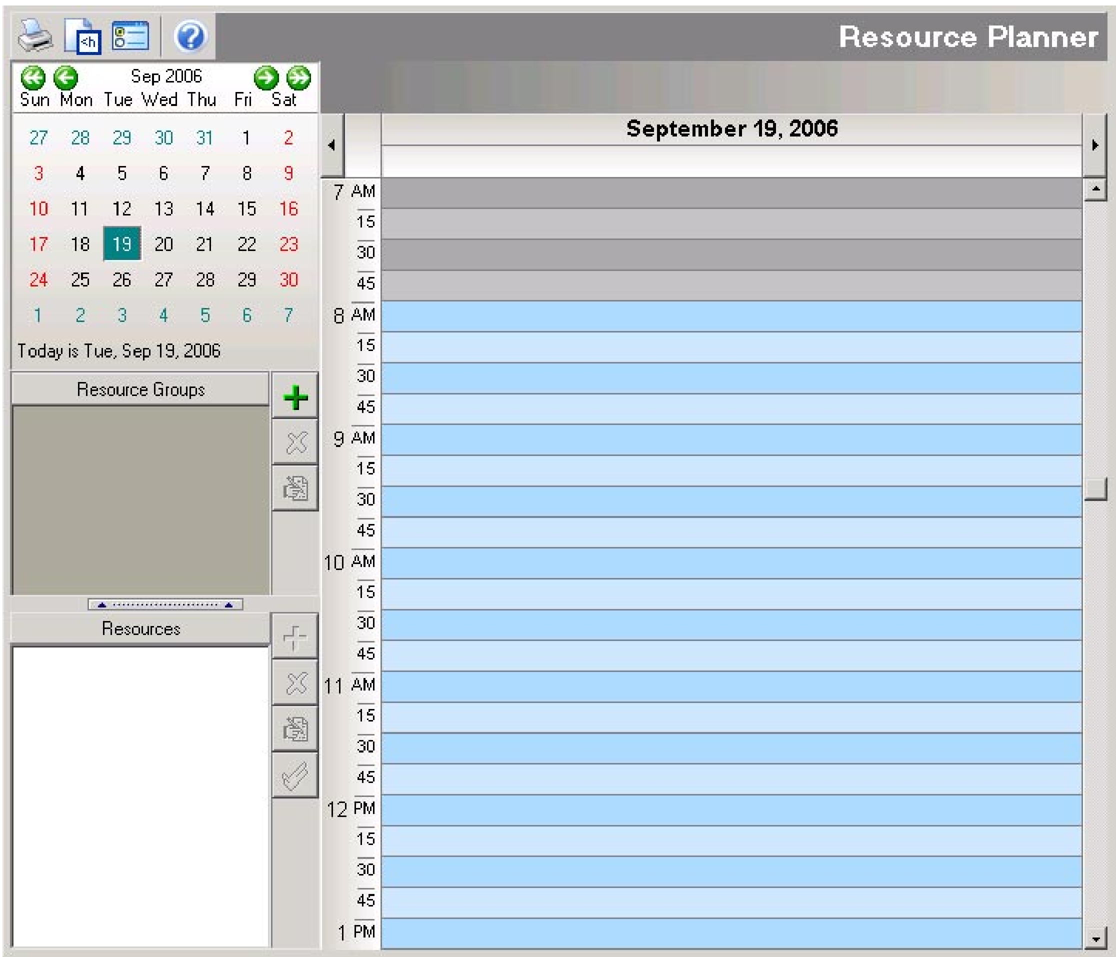
USING PROSCHOOL'S RESOURCE PLANNER

ProSchool now includes a Resource Planner, a tool which is similar in function to a Daytimer®-style organizer. The key difference is that this planning tool interfaces with key functions in ProSchool, which makes it very powerful. Its title says it best: it is specifically designed to help you efficiently plan and allocate your resources (time, staff, facilities, etc.).

To open the ProSchool Resource Planner:

1. Click  (the **Tasks** button on the left) to reveal the task menu buttons.

2. Click  (the **Planner** menu button) to open the **Resource Planner**:

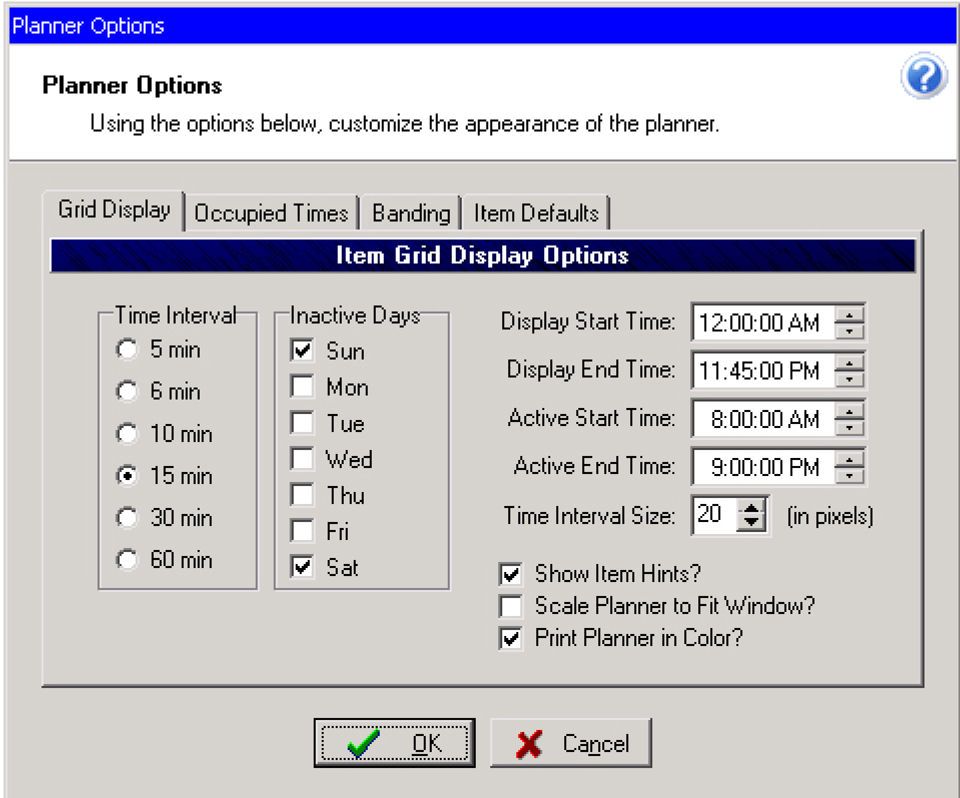


The key features of this tool are the calendar in the upper-left corner, the Resource Groups and Resources sections below the calendar, and the daily planner that occupies the bulk of the window. Note, too, that the banding consists of shades of gray prior to 8:00 a.m., and shades of blue thereafter. This can all be modified to suit your tastes, which we'll do in the following steps.

Using ProSchool's Resource Planner

-continued-

3. Click  to open the **Planner Options** window:



Note the four tabbed sections entitled "Grid Display", "Occupied Times", "Banding" and "Item Defaults". Each of these sections allows you to customize and configure the Resource Planner to your own personal preferences.

4a. In the **Grid Display** tabbed section, set the band intervals (**Time Interval** parameter). It is currently set to 15 minute increments as shown in the screen shot on the previous page. Click the interval you prefer.

4b. Set the days on which your school typically does *not* meet (**Inactive Days** parameter) by selecting them via the check boxes.

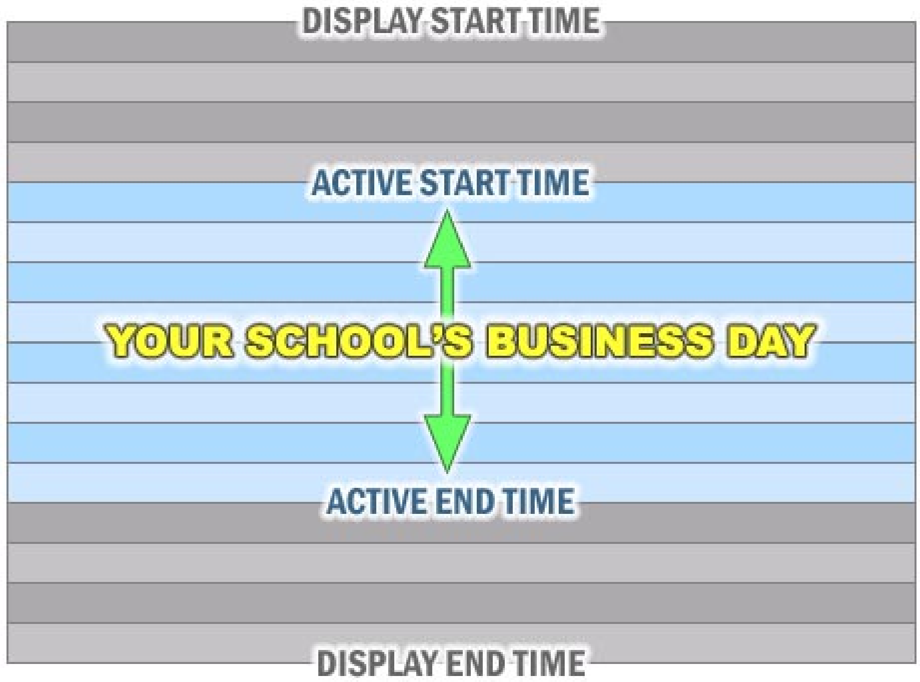
4c. Define the maximum "time window" you want the planner to display for your day, as follows:

- **Display Start Time:** is the absolute *earliest* time you want the Resource Planner to show (for example, if you wanted the display to show all 24 hours in a day, you would set this to "12:00:00 AM" as shown in the above screen shot);
- **Display End Time:** - is the absolute *latest* time you want the Resource Planner to show (for example, if you wanted the display to show all 24 hours in a day, you would set this to "11:45:00 **PM**" as shown above);
- **Active Start Time:** - the *earliest* time at which your school generally starts operation (you could make this the time your earliest shift starts, or set it as an arbitrary early time, such as 8:00:00 AM, as shown above);
- **Active End Time:** - the *latest* time at which your school generally closes down operation for the day (you can make this the time your latest shift ends, or an arbitrary "end-of-the-day" time such 9:00:00 PM, as shown above).

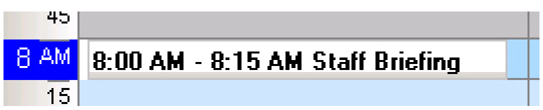
Using ProSchool's Resource Planner

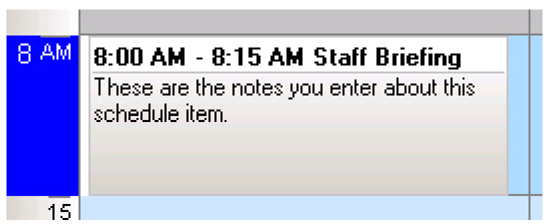
-continued-

The default banding colors are configured to display as follows:



4d. Set the individual band size—height—in pixels (**Time Interval Size** parameter). Note that this choice impacts the degree to which you'll be able to view any notes you've entered in a given planner item. For example, the screenshot immediately below, left, shows the planner item as it would appear with the default height of 20 pixels, while the screen shot below on the right shows the same calendar item as it would appear with the height set to 80 pixels:



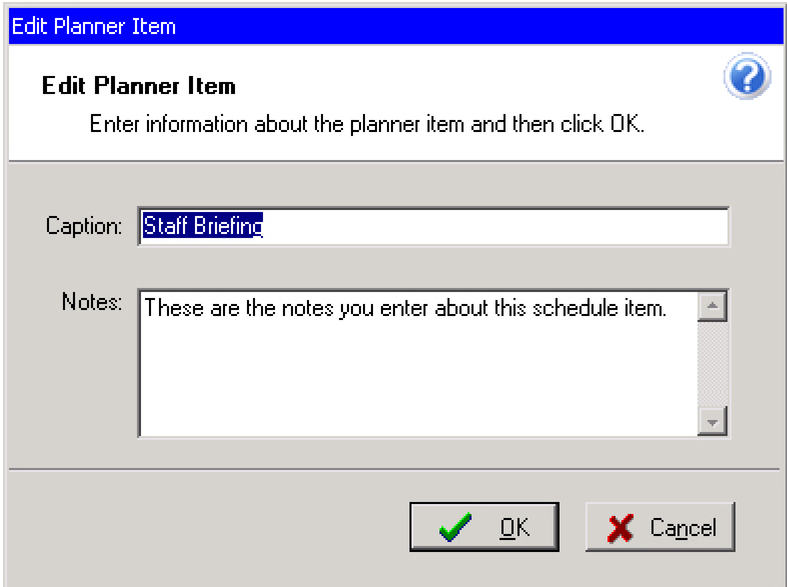


The trade-off is obvious: a greater screen height displays more detail on individual planner entries, but the window will display far fewer segments (i.e., less of the day) at a time, which necessitates more scrolling on your part to move through the day.

Using ProSchool's Resource Planner

-continued-

However, bear in mind that if you use a lesser height value, such as the 20 pixels default height, you can still easily access an entry's data simply by clicking on it once to open the **Enter Planner Item** window:

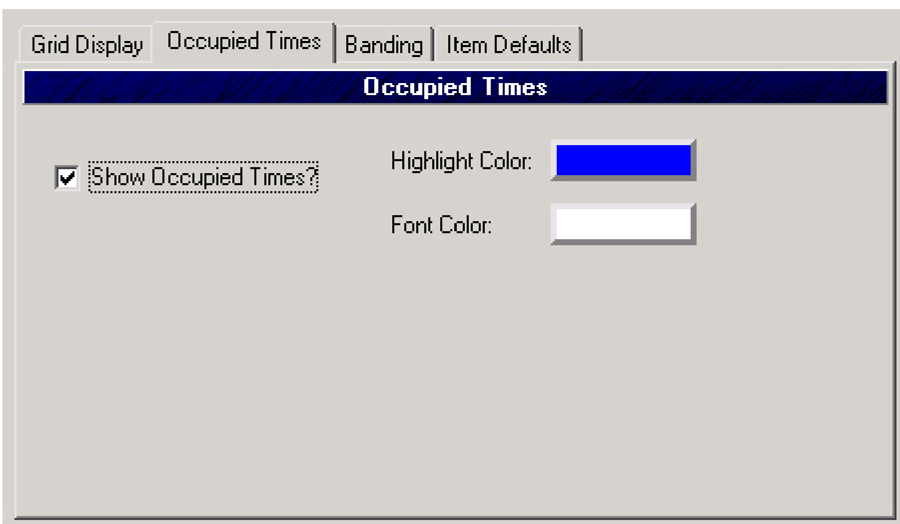


4e. If you want the Planner to display additional information for a given item in a "hint balloon" when you roll over it with your mouse, check the **Show Item Hints?** box.

4f. If you want ProSchool to scale the planner so that it fills the window correctly, check the **Scale Planner to Fit Window?** box.

4g. If you want ProSchool to print the Planner in color (as it appears on the screen) instead of in monochrome (shades of gray), check the **Print Planner in Color?** box.

5a. In the **Occupied Times** tabbed section, you can select whether you want to have "occupied" time slots represented in a different color scheme to set them apart:

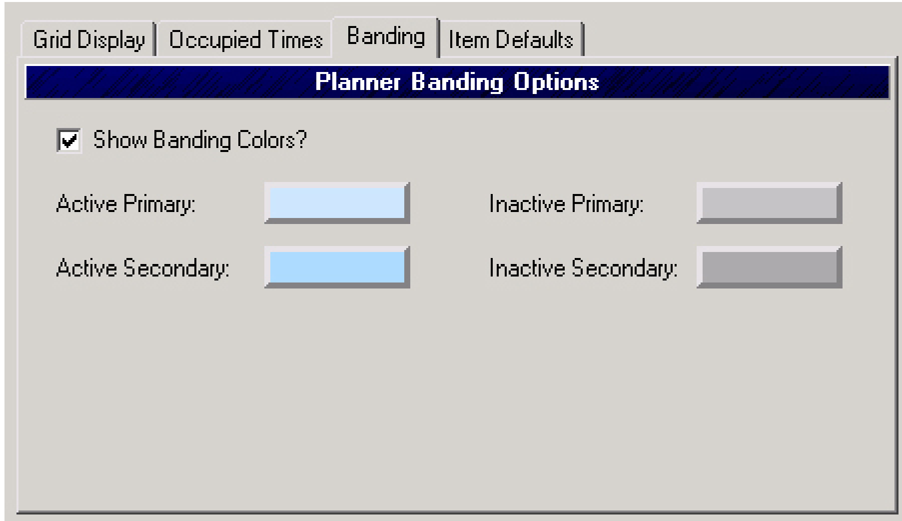


If so, click the **Show Occupied Times?** check box and choose the colors you prefer.

Using ProSchool's Resource Planner

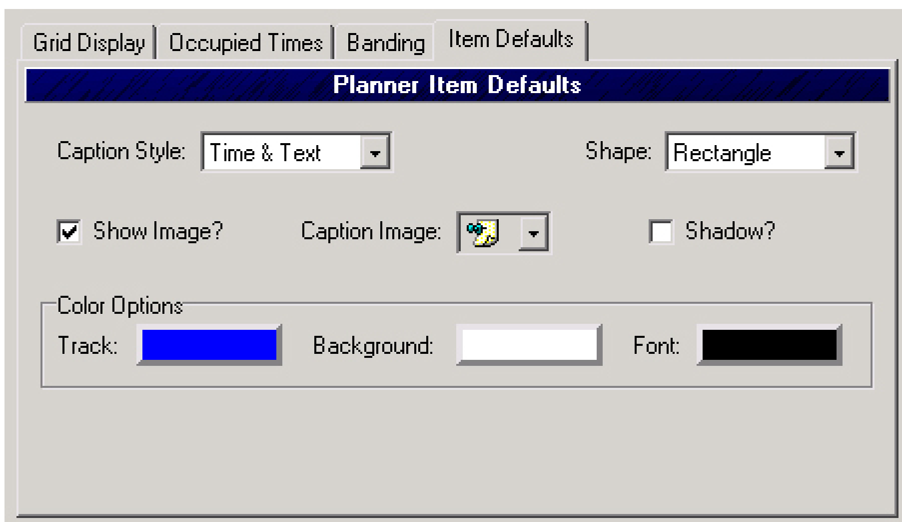
-continued-

5b. In the **Banding** tabbed section, you can select the banding colors:

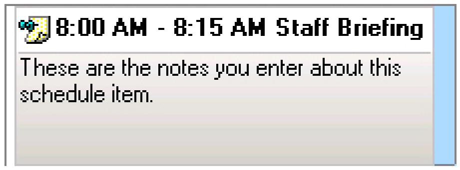


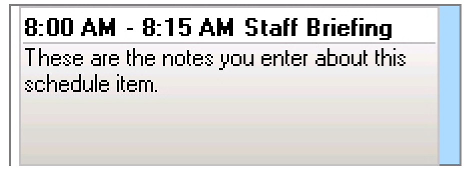
Note that the color scheme shown above is the default, as seen in the screenshot at the beginning of this section on page 270. If you don't want banding colors and prefer a white page, deselect the **Show Banding Colors?** check box.

5c. In the **Item Defaults** tabbed section, you can configure various options that affect the appearance of each individual planner item:



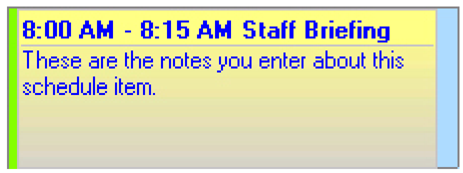
Both of the images below are of the same Planner entry. The Planner item on the left includes a caption image; the one on the right does not. As shown in the screenshot above, you can select whether or not to display a caption image (**Show Image?** check box), and if you do, choose the image you prefer (**Caption Image:** drop-down menu).



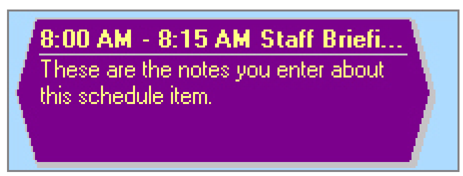


The “Shape”, “Color” and “Shadow” options allow you to configure the color and appearance of Planner entries. This can spice up the appearance of your entries, but it also gives you an effective “at a glance” means of visually identifying Planner entries related by type or category.

In this first example, we made the text blue, the background color yellow and the band green:

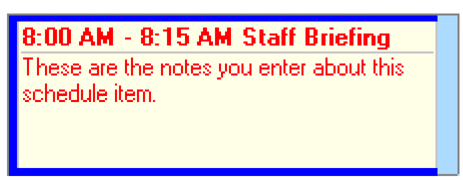


Here, we changed the text color to yellow and changed the background to purple. However, we also changed the **Shape** attribute to “hexagonal”:



Note that while the hexagonal adds a distinctive appearance, it also reduces the amount of space left for text display (all other things being equal) as evidenced by the word “Briefing” being truncated to “Briefi...”. This may be a factor if your Planner item entries tend to have longer names.

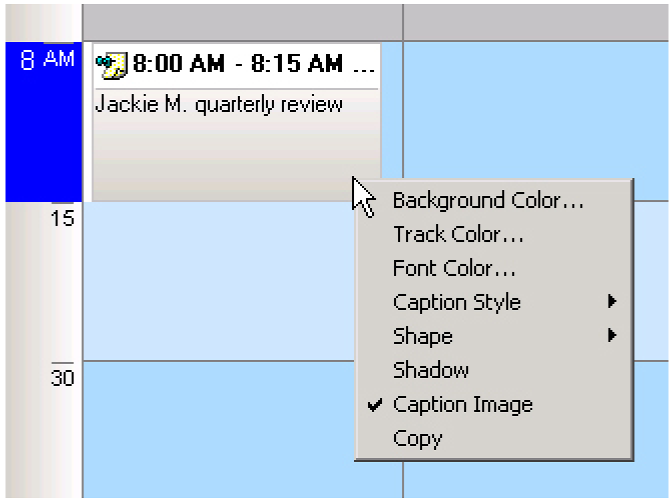
Another thing to note is that regardless of the appearance attributes you choose, any Planner item will appear as follows when it is highlighted:



Using ProSchool's Resource Planner

-continued-

Lastly, note that you can easily change an item's properties by right-clicking on it:



Now that we've covered the "mechanics" of the Planner tool, we'll discuss how it functions by using an example that is very popular with lots of ProSchool users: tracking and planning Student birthday parties. Here are the component steps we'll undertake:

- we will create a **resource group** named "Birthday Parties";
- we will attach a **resource** to it (for example, a part of the gym facility where it would be held, such as "party room");
- we will create a number of informational **data fields** that allow us to add pertinent information (for example, what the Student wants for his or her birthday, what kind of cake and food they prefer, what kind of deposit will be required from the Client, how many kids are coming, etc.).

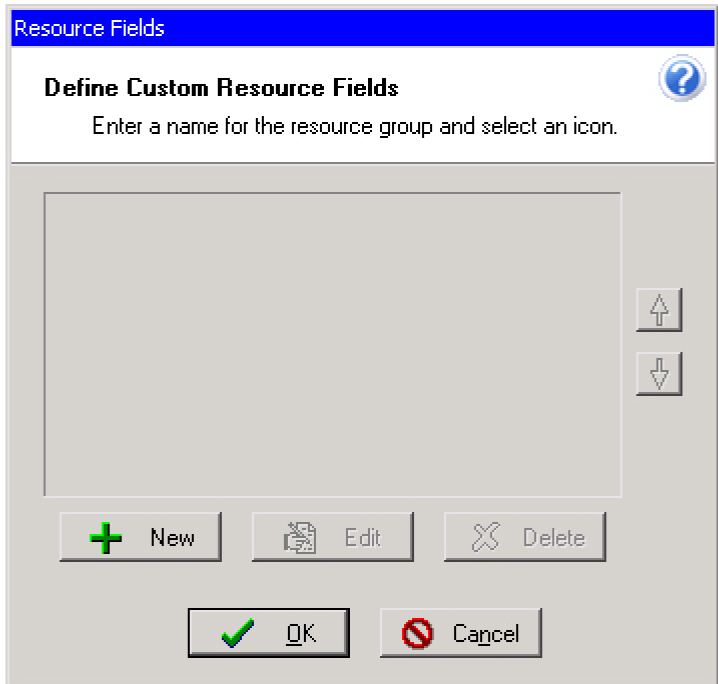
6a. In the **Resource Groups** section, click to open the **New Resource Group** window:

Using ProSchool's Resource Planner

-continued-

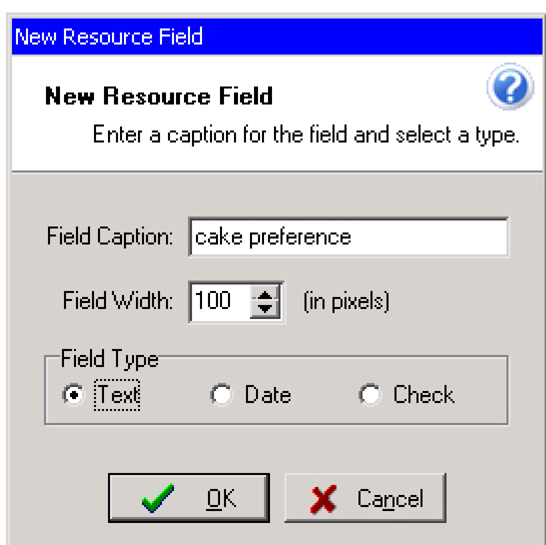
6b. Enter the name of your new resource group (such as “Birthday Parties”, as shown above), but don’t click **OK** just yet—we’re also going to create the informational fields we need before closing this window.

6c. Click **Define Custom Fields...** to open the **Resource Fields** window:



This is where you add, edit and delete fields (if you had already added fields, those existing fields would be displayed).

6d. To add a new field, click **New** to open the **New Resource Field** window:



6e. Enter the name of your first field in the **Field Caption:** field.

Using ProSchool's Resource Planner

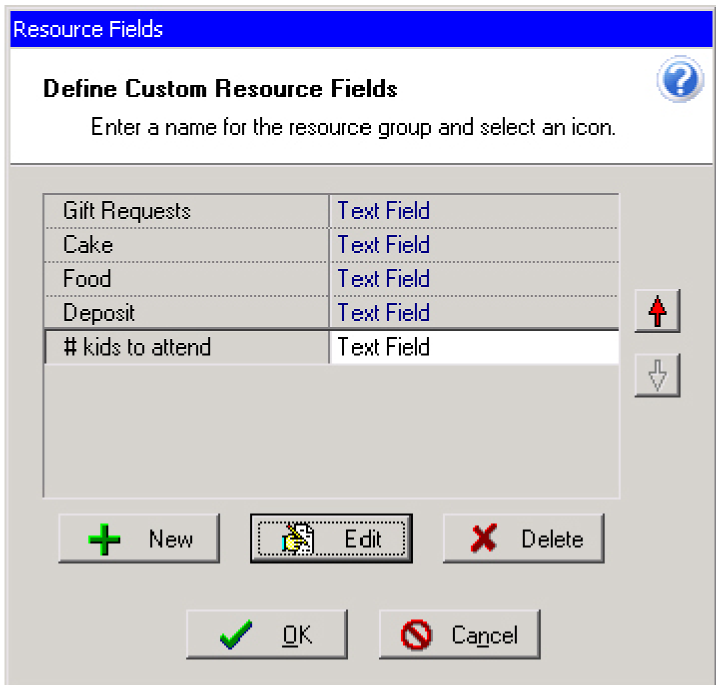
-continued-

6f. In the **Field Width:** section, specify the width of the field in pixels (if you're not sure, just leave it at the default value; you can always change it later).

6g. In the **Field Type:** section, specify whether this field will be textual information, a date, or a check box.

6h. Click when you're done to return to the **Resource Fields** window.

6i. Repeat the following steps for "gift requests", "food", "deposit" and "kids to attend". When you complete these, the **Resource Fields** window will look something like this:



If you want to change the order in which these field titles appear in this window, you can do so by first selecting the field title, then clicking or to move it up or down.

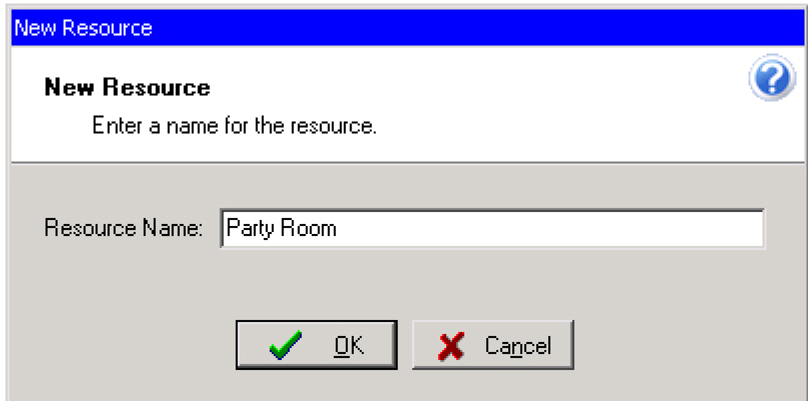
When your fields are complete, click to save them and return to the **New Resource Group** window. At this point, you'll note that your newly-created "Birthday Parties" resource group is reflected in the window:

Using ProSchool's Resource Planner

-continued-

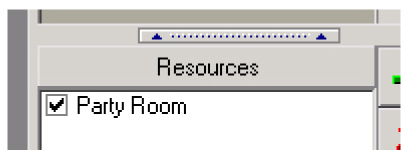
Note that Resource Groups have Resources attached to them (hence the term "group"). Put another way, there will be a specific subset of one or more Resources for each Resource Group. In fact, you cannot add an item from a given resource group until you define that Group's resources. In the next step, we do exactly that.

7a. Click  to open the **New Resource** window:



7b. Enter your resource ("Party Room" in the example above) and click 

to add it to the **Resources** Group:



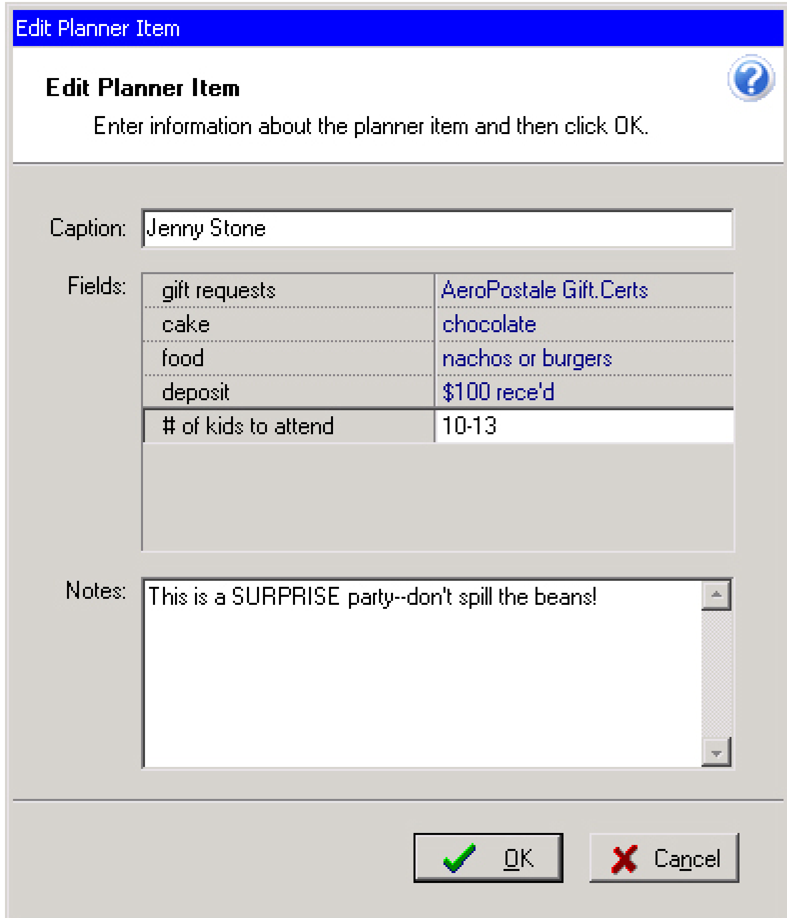
Note that there is a check box, that is checked, with the Party Room resource. At this point, we're ready to use the Planner tool to add a birthday party to our School's schedule.

8a. Use the calendar to select the date on which the party will be held, and then to the time block during which it will be held.

Using ProSchool's Resource Planner

-continued-

8b. Right-click on the time segment to open the **Edit Planner Item** window:



Note the informational fields you configured previously, in the **Fields:** section.

8c. In the **Caption:** field, enter the heading, or title, of this planner entry.

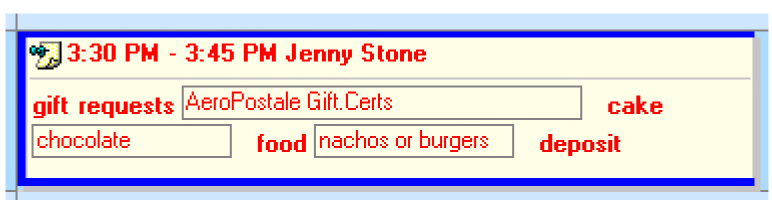
8d. Fill in the remaining sections (as shown above).

8e. Optionally, you can also add a note, if you wish, in the **Notes:** section.

The completed window will appear similar to the one above.

8f. Click 

to save this Planner entry and return to the main **Resource Planner** window. Using the example above, here's how your entry's information would appear:



Note that the size of the item, based on the way you have configured the planner display, may or may not display all informational fields. Above, for example, the "deposit" field doesn't show the deposit amount because there isn't enough room in the box for it to display. However, by simply right-clicking on the planner item, the **Edit Planner Item** window opens (as shown at the top of this page), displaying all of the details.

Using ProSchool's Resource Planner

-continued-

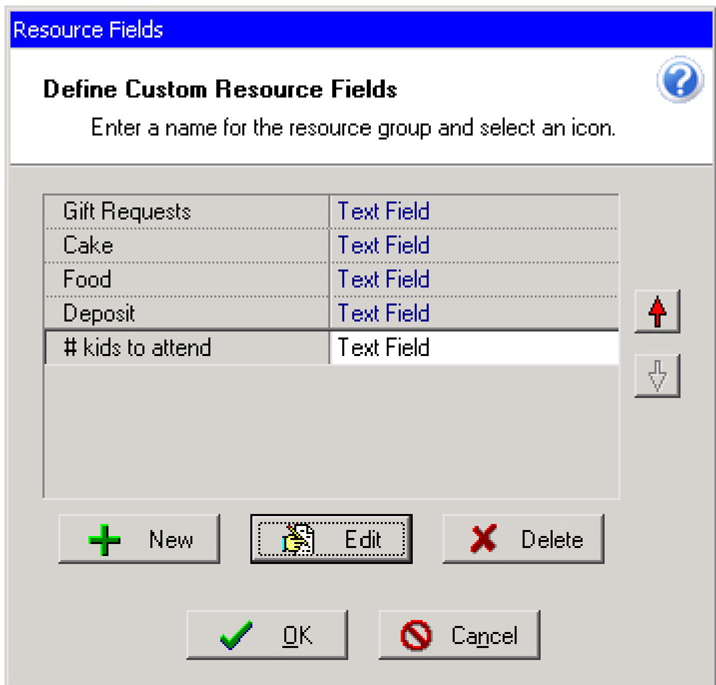
The key here is to arrange the display order of the various informational fields so that the most important ones always appear in the planner item box, given the display configuration you set up for the Planner.

For example, let's say the "deposit" field is one of the most important fields for you. Here's how to rearrange the order of the informational fields:

9a. Click on the Resource Group item you want to modify (continuing with our example, this would be "Birthday Parties").

9b. Click to open the **Edit Resource Group** window (as shown earlier in this chapter).

9c. Click Define Custom Fields... to open the **Resource Fields** window:



9d. Click on the information field title you want to move up or down (continuing with our example, that would be "Deposit").

9e. Use the and buttons to arrange the hierarchy you desire. Taking our example a bit further, you could rearrange the planner item box to display the "deposit" field more prominently:

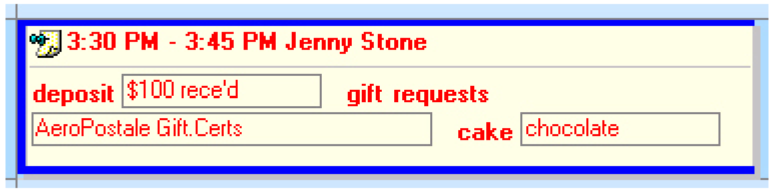
deposit	Text Field
gift requests	Text Field
cake	Text Field
food	Text Field
# of kids to attend	Text Field

Click OK to save your changes and close the window (and then once again to close the **Edit Resource Group** window).

Using ProSchool's Resource Planner

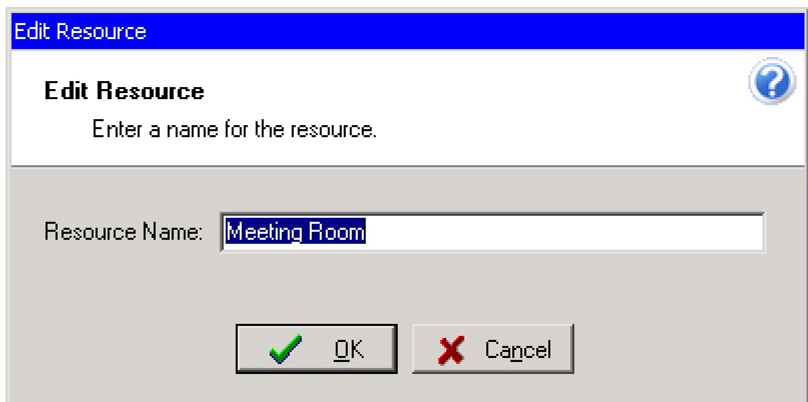
-continued-

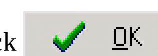
This would result in the planner item displaying the "Deposit" data immediately after the time and caption:



As you can see above, you would have to resize the Resource Planner grid to a very small size to keep the "deposit" information from appearing. As you continue to work with this tool, you'll gain a better sense for which information you'll want to be available at a glance, and you can configure the order of the informational fields accordingly.

10a. To edit a Resource's name (which is the only thing you can edit about Resources), first select it in the **Resources** section, then click  to open the **Edit Resource** window:



10b. Make the desired changes in the Resource Name: field, then click  to save your changes and close the window. The updated name changes for this Resource will now be reflected in the **Resources** section.

Processing Drop No Pays and Auto Pays

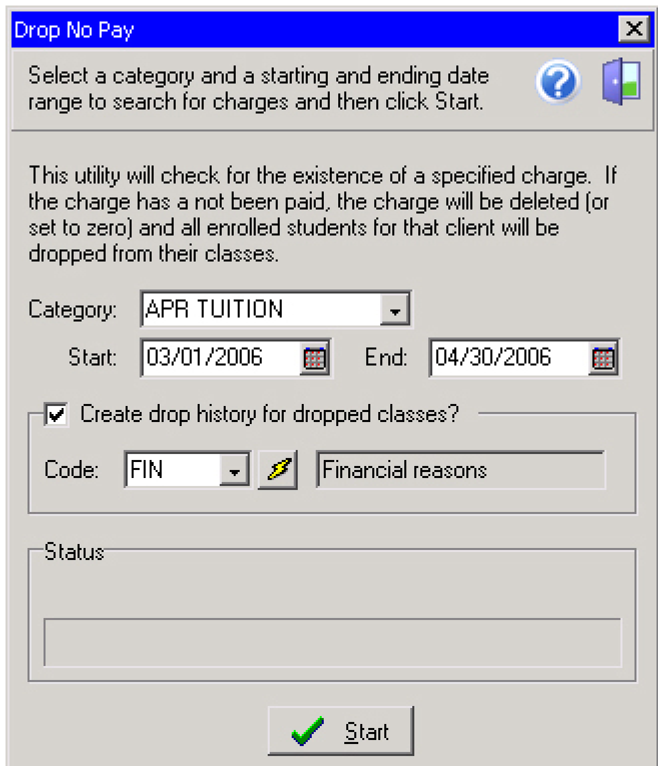
Processing Drop No Pays

Sometimes, you may have a situation arise where you must drop Students due to lack of payment. This utility enables you to do so easily and accurately, even if the Students to be dropped are enrolled in multiple classes.

This process looks for a specific charge, which you define by specifying a category and date range. If the charge has not been paid, ProSchool deletes the charge (or sets the charge amount to zero), then drops *all* enrolled Students for those Clients that meet that criteria.

To process "Drop No Pays":

1. Click on the **Billing** pull-down menu on the main button bar and click **Process Drop No Pays...** to open the **Drop No Pay** window:



In the example shown above, payment of April's tuition is the specific criterion we're using to determine if Students will be dropped. The specified date range for this charge is from March 1st (in case there are any Clients who were billed in advance) through April 30th. This reflects a realistic window within which this charge occurred.

2. Use the **Category:** drop down menu to select the appropriate category.

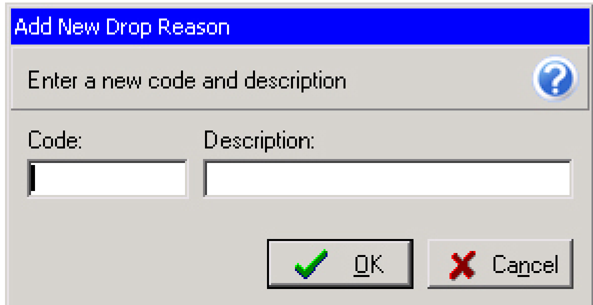
3. Use the **Start:** and **End:** date fields to enter the date range values.

4a. If you wish to create a drop history for each dropped class (that is, every class dropped by every Student who meets the criteria you configured above), check the **Create drop history for dropped classes?** check box.

Processing Drop No Pays and Auto Pays

-continued-

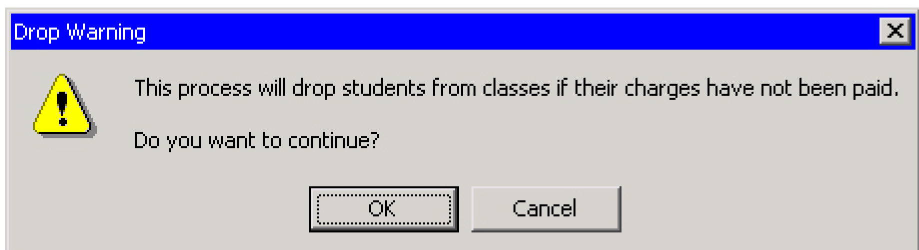
4b. Use the **Code:** drop-down menu to select the drop code you want to use for the drop histories this operation will create. If none of the drop codes apply, you can create a new one by clicking to open the **Add new drop reason** window:



Enter a code (up to four characters) and a description in the appropriate fields, then click OK to both create that new drop code, and insert it into the appropriate fields in the **Process Drop No Pays** window.

5. After double-checking your criteria, click Start to initiate Drop No Pay processing.

The following warning message appears:



This message appears because this operation cannot be undone once you initiate it.

6. Click OK to process the drop no pays. When ProSchool has completed processing them, the following confirmation message appears:

Note that while all the Students who met this criteria you defined have been dropped, they are still in your ProSchool database. If you have reason to enroll them in classes at any point in the future, you will not have to re-enter them into the database.

PROCESSING AUTO PAYS

ProSchool allows you to leverage the power of automatic billing through the “Auto Pay” feature. Clients have to first be set up for Auto Pay, which is a onetime configuration setting in the **Family Information** panel. We’ll describe that setup first, then we’ll cover the actual processing steps to bill Clients who are set up for Auto Pay.

To configure a Family for Auto Pay:

1. Click 

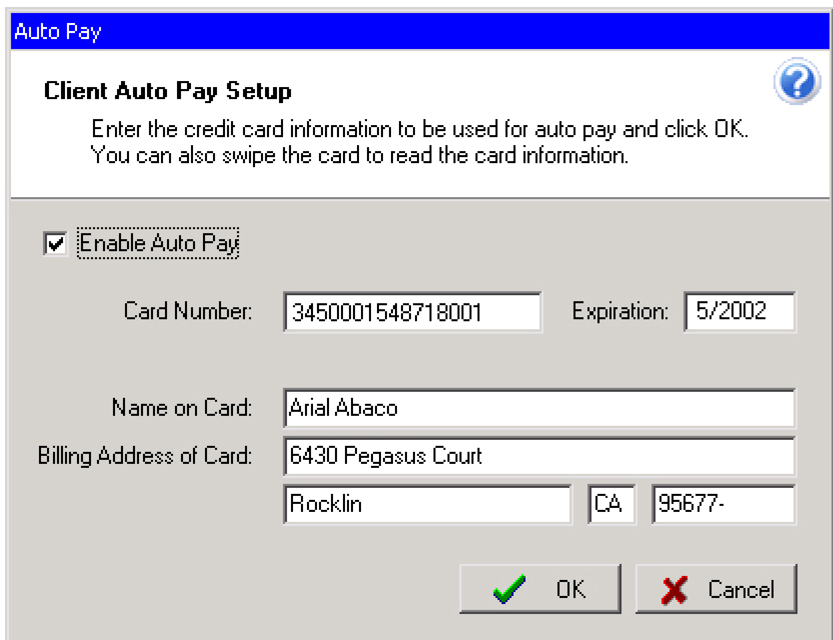
(the **Tasks** button on the left) to reveal the task menu buttons.

-continued-

2. Click 

(the **Family** menu button) to open the **Family Information** panel.

3. Click  (in the upper right-hand area) to open the **Auto Pay** window:



4. To enable Auto Pay for this Client, check **Enable Auto Pay**.

5. Enter the credit card number, expiration date, name (as it appears on the card) and the *billing* address in the appropriate fields. Note that the billing address may be different than the residence address. (Don’t confuse the two; credit card verification requires the correct billing address.)

6. Click 

to complete the Auto Pay configuration for this Client.

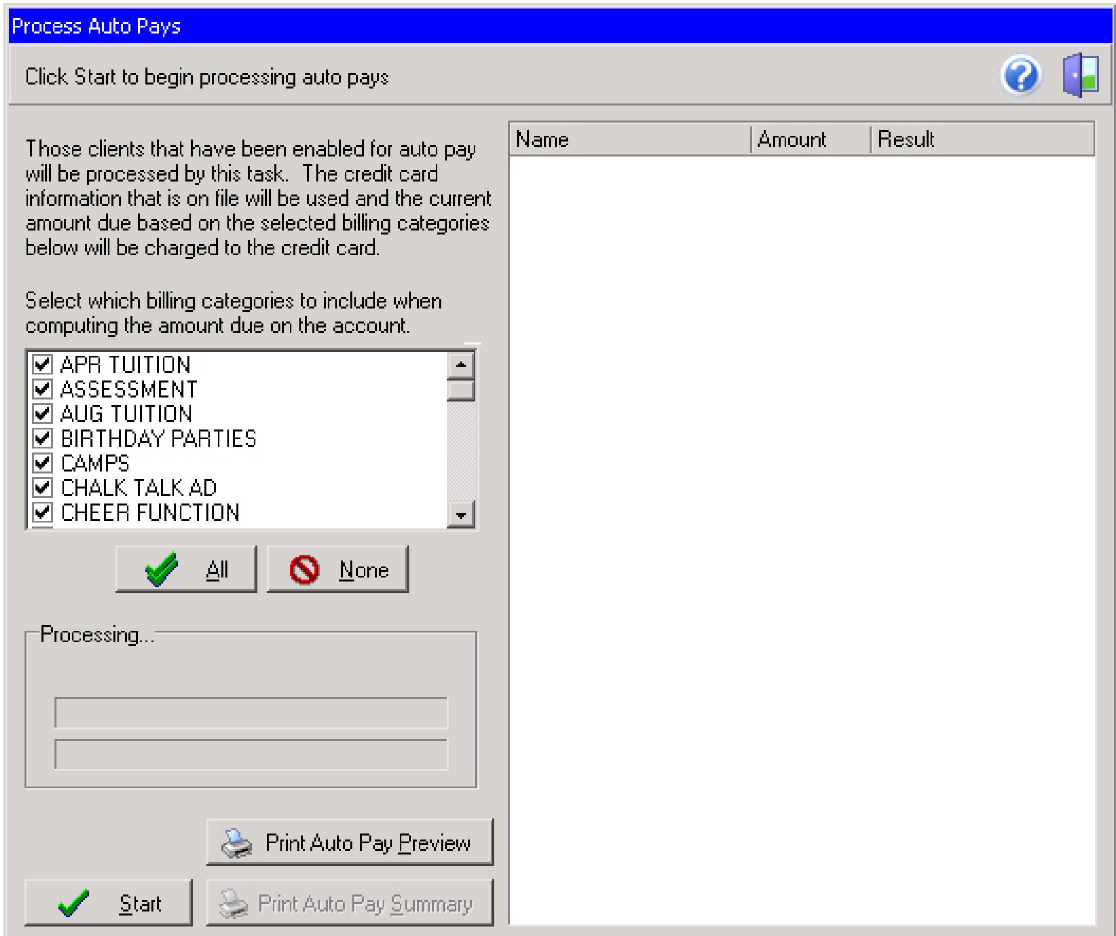
The next step is to process Auto Pays.

Processing Drop No Pays and Auto Pays

-continued-

To process “Auto Pays”:

1. Click on the **Billing** pull-down menu on the main button bar and click **Process Auto Pays...** to open the **Process Auto Pays** window:



First, to be clear: **ALL Clients that you’ve set up for Auto Pay (as described in the steps on the previous page) will be included in this processing.** Specifically, All outstanding charges based on the billing categories you’ve selected above will be processed for payment using the credit card on file for each of the Clients you’ve set up for Auto Pay.

2. Select the categories to include in this Auto Pay billing by checking them, or click All to select every billing category in the list (they are all selected by default).

Conversely, you can click None to deselect all categories.

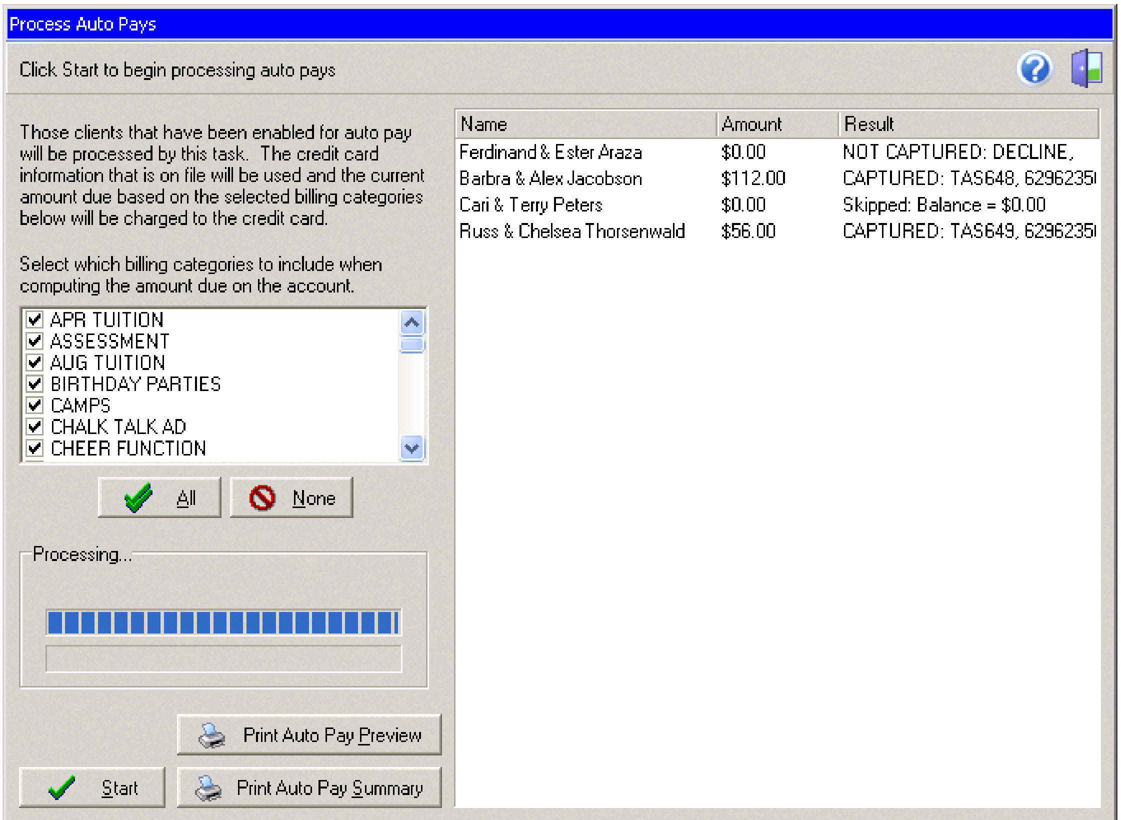
3. If you are unsure about this process and would like to review a list of all Clients who will be charged and the amount they will be charged, click Print Auto Pay Preview to print one.

4. Click Start to initiate the Auto Pay processing.

Processing Drop No Pays and Auto Pays

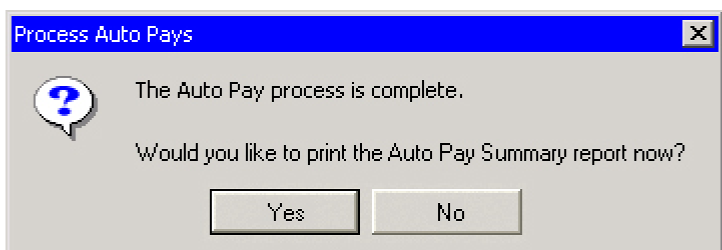
-continued-

ProSchool begins processing Auto Pays and indicates its progress via the **Processing** indicator:



In addition, the process will report each charge (by Client), the amount and the result (as shown above).

When ProSchool is done processing Auto Pays, the following message appears:



The "Auto Pay Summary" report details the information presented in the "Name", "Amount" and "Result" columns in the above **Process Auto Pay** window above. We strongly recommend that you print this report out for your records, and use it to contact those Clients whose cards were declined. As you can see above, the report will detail the reason for the decline as reported by the Processor.

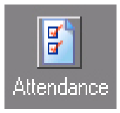
Recording and Tracking Class Attendance In ProSchool

RECORDING AND TRACKING CLASS ATTENDANCE IN PROSCHOOL

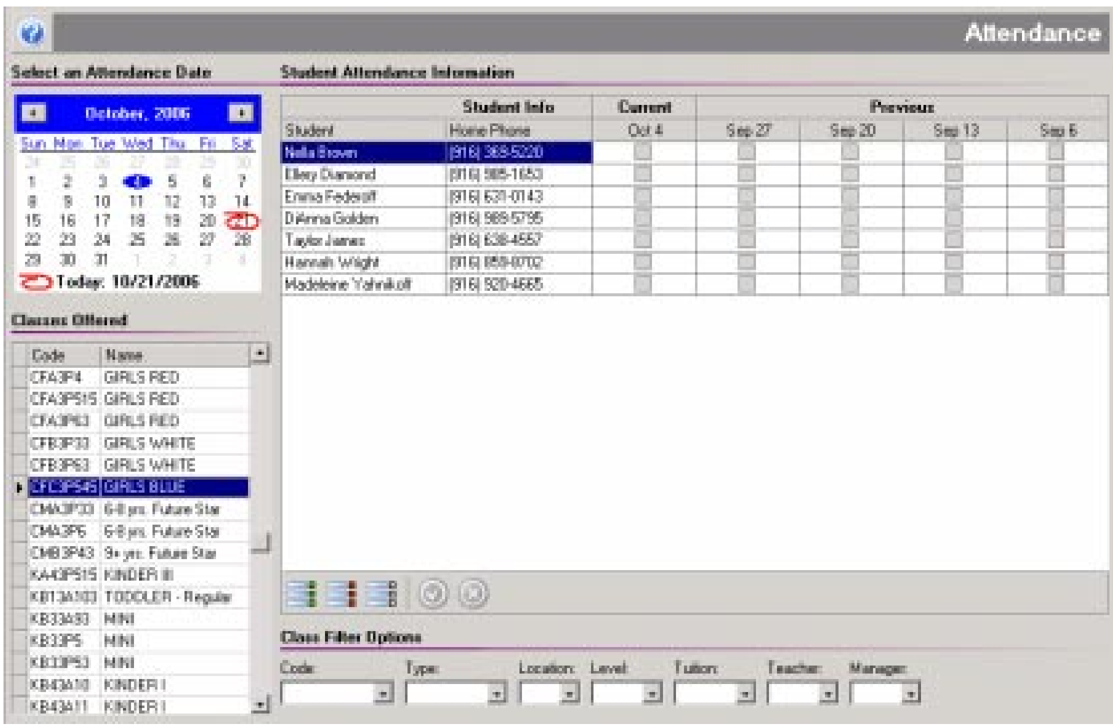
ProSchool's Attendance module is a date-driven attendance tracking tool that provides you with a quick and comprehensive means of tracking attendance in your school's classes. At the same time, ProSchool uses the attendance data to compile an ongoing attendance history that you can refer back to should you ever need to.

To use the Attendance tool:

1. Click Tasks (the **Tasks** button on the left) to reveal the task menu buttons.

2. Click 

to open the **Attendance** window:



3. Select any date using the calendar tool (upper left-hand corner).

4. In the **Classes Offered** section on the left, select the class you want to view or enter attendance information for. When you select the class, all Students enrolled in that class will be displayed in the main **Student Attendance Information** window, as shown above.

The attendance for the selected ("active") date is in the **Current** (left-most) column. Note that the attendance history for the previous four class dates for this selected class are also displayed in the columns immediately to its right (for a total of five class dates displayed at one time). This gives greater context to the attendance history.

Recording and Tracking Class Attendance In ProSchool

-continued-

Attendance is depicted in one of three ways:

the default **cleared** state (attendance status unknown, or not yet entered);

Student **present** (Student was in class on this date), or;

Student **absent** (Student was NOT in class on this date).

Clicking on the check box toggles through each of these states; simply click on the check box until the desired state appears.

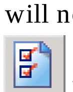
To make the process more efficient, ProSchool offers the following buttons to save time by "batching" your attendance entries when all Students for the selected date share the *same* attendance status:

- click  to mark *all* Students **present** for the selected date.
- click  to mark *all* Students **absent** for the selected date.
- click  to **de**select *all* Students and return check boxes to their unmarked (default) state.

5. When you are done entering attendance data for the selected date, click  to save the data.

6. If you have modified existing attendance data (that is, attendance data that was previously entered and saved), but then decide you want to revert to the data that was already recorded (such as if you changed data for the wrong date accidentally), click  to abandon your entries.

7. You can filter the classes displayed by any of several filter criteria by defining the desired criteria in the **Class Filter Options** section at the bottom of the **Attendance** window. (To remove the filtering, delete any populated filter fields.)

Note: The attendance history for each Student is recorded. Even though a dropped Student will no longer appear on attendance rolls, their history is archived and is available by clicking  in the **Student Information** section of the **Family Information** window. The attendance history window is described on page 145 in the previous section entitled, "Building Your ProSchool Database".

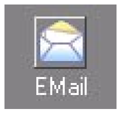
Using ProSchool's Email Utility

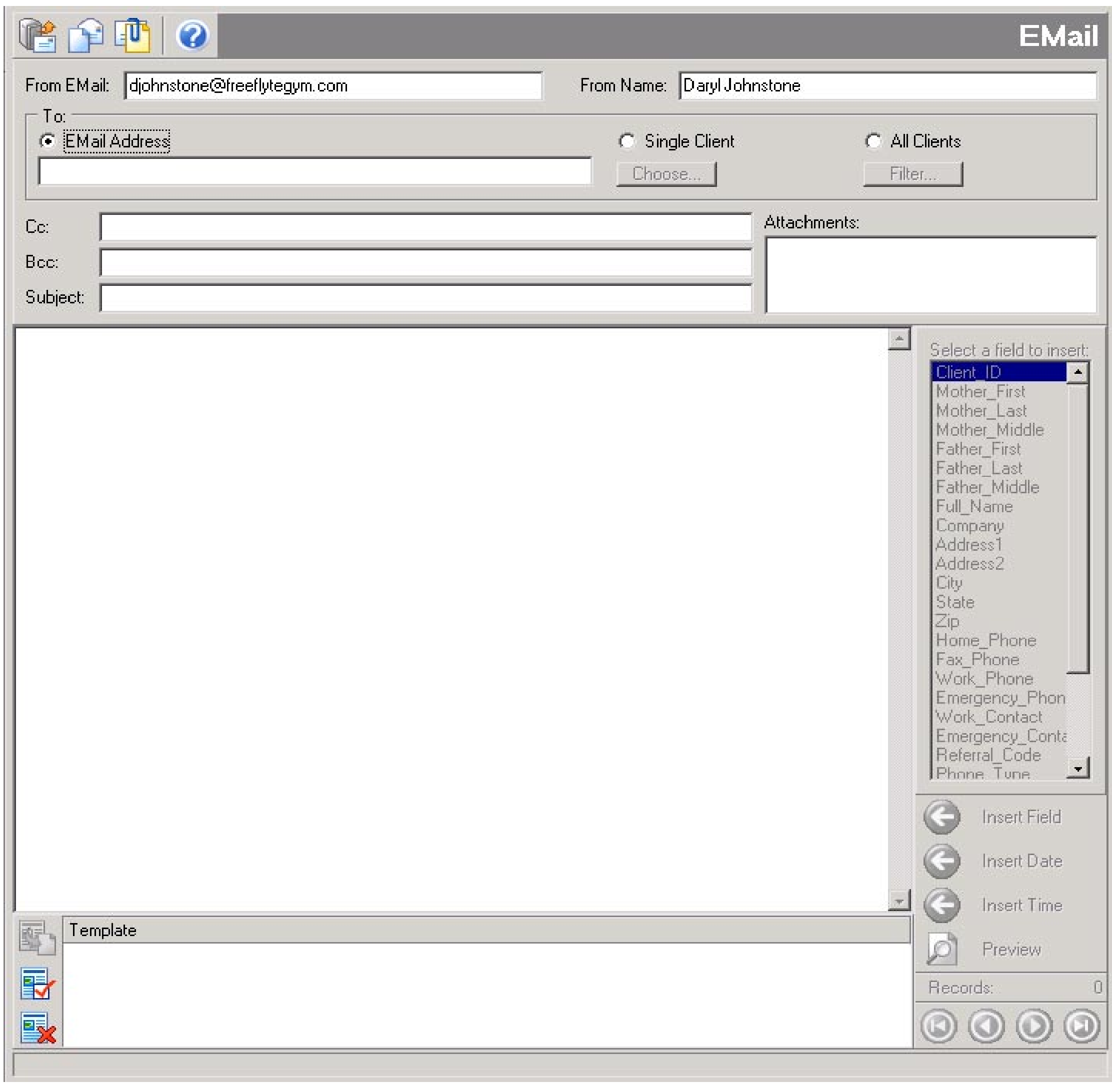
USING PROSCHOOL'S EMAIL UTILITY

ProSchool offers you the convenience of sending e-mails to your school's Families from within the program. Because e-mail addresses are pulled from ProSchool's Family database, you can create e-mails that are targeted to your entire Family population (such as e-mail-based newsletters, announcements, etc.) and "broadcast" them to everyone in just a few clicks.

To use the Email utility:

1. Click Tasks (the **Tasks** button on the left) to reveal the task menu buttons.

2. Click  to open the **EMail** window:



Note that the **From Email:** and **From Name:** fields are populated with the email address and name you configured on page 38 in the section entitled, "Configuring ProSchool To Your School".

Using ProSchool's Email Utility

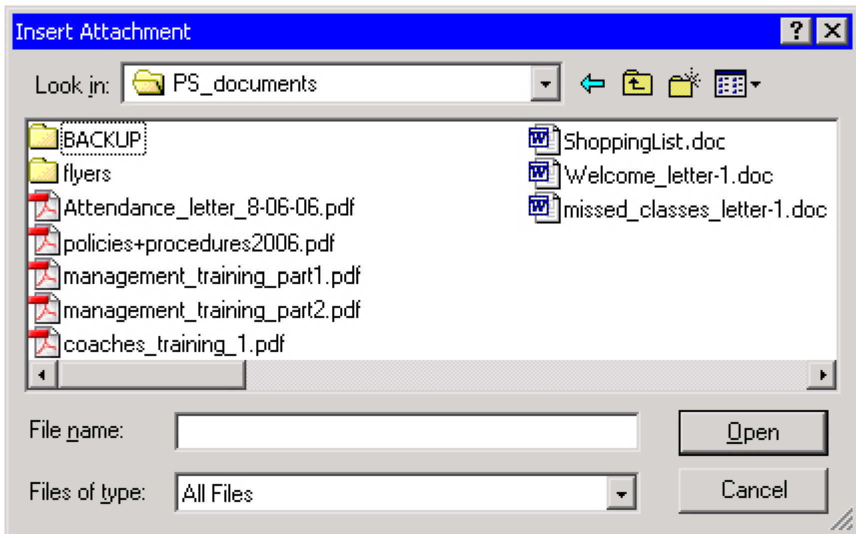
-continued-

3. In the **To:** section, you can select a recipient one of three ways:

- select **Email Address** and enter the email address of your choice;
- select **Single Client**, then click Choose... to open the **Select A Client Window**, from which you can select a Client (then click OK to enter their email address);
- select **All Clients** to select all Clients (that is, all those for whom you have email addresses), or a selected subset by using filters (these filters, and their configuration, are identical to those described and used in the later section entitled, "Using Filter Criteria in ProSchool Reports", starting on page 305).

4. Complete the **Cc:**, **Bcc:** and **Subject:** fields as you would in any email.

5. You can also add one or more attachments to your email by clicking (top left-hand corner) to open the **Insert Attachment** window:



Navigate to the file you want to attach, and click Open to select it (the file itself will not actually open). The file's name will now appear in the **Attachments** panel.

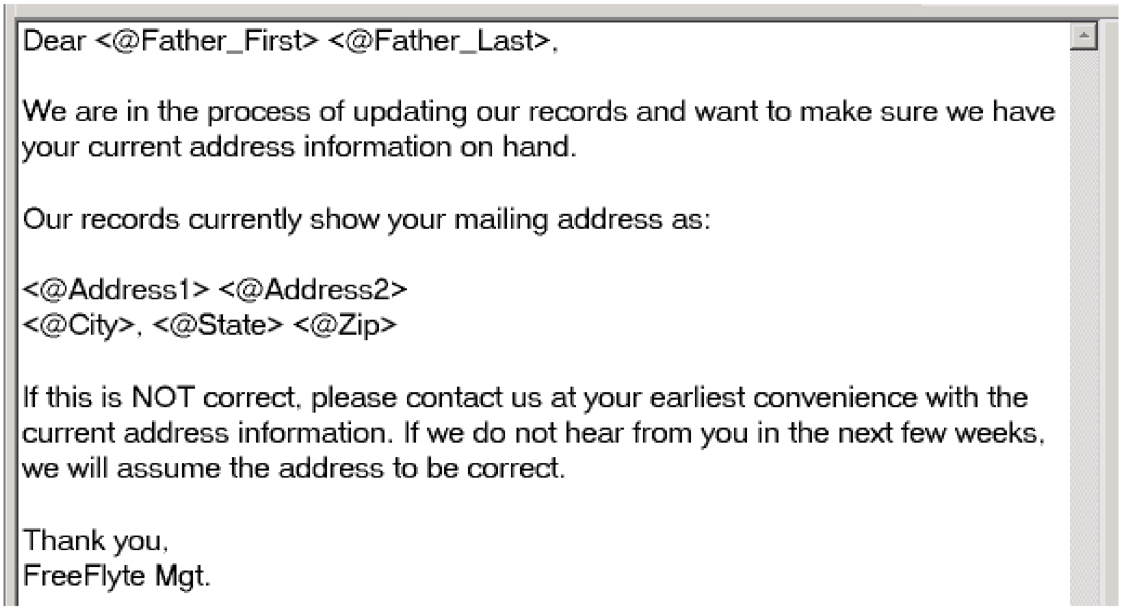
6. To personalize the email, ProSchool gives you the option of inserting specific Client information in the body of the e-mail to create an email *template*. This comes in handy, for example, if you want to start each e-mail with a salutation that includes the recipient's first name, i.e., "Dear Mary,", "Dear Kenny", etc.).

From the **Select a field to insert:** list, select the field you want to insert in your email's message body, then click Insert Field to enter it. Likewise, to enter the current date or time in the body of the e-mail (that is, the date and / or time as of when the email is sent), click Insert Date or Insert Time respectively. Note that as you create the template, a given field's actual info does not appear, but instead, a descriptor that represents that info is entered. For example, if you choose "Father_First" (the father's first name), the tag "<@Father_First>" appears in the body of the email.

Using ProSchool's Email Utility

-continued-

It looks something like this:



Dear <@Father_First> <@Father_Last>,

We are in the process of updating our records and want to make sure we have your current address information on hand.

Our records currently show your mailing address as:

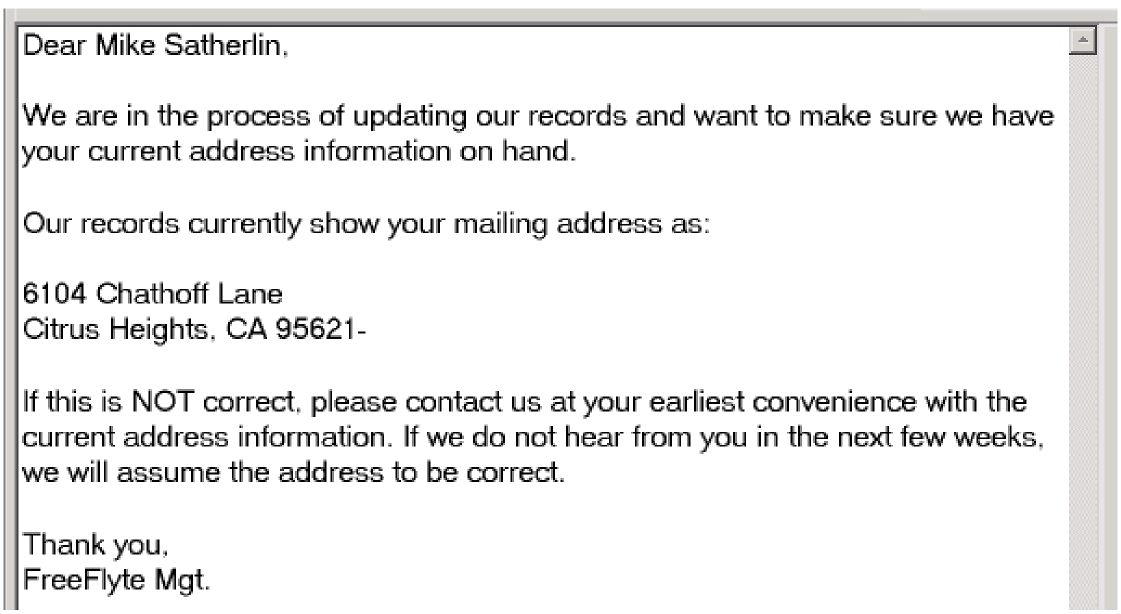
<@Address1> <@Address2>
<@City>, <@State> <@Zip>

If this is NOT correct, please contact us at your earliest convenience with the current address information. If we do not hear from you in the next few weeks, we will assume the address to be correct.

Thank you,
FreeFlyte Mgt.

If you wish, you can click 

to see the actual data represented by this tag:



Dear Mike Satherlin,

We are in the process of updating our records and want to make sure we have your current address information on hand.

Our records currently show your mailing address as:

6104 Chathoff Lane
Citrus Heights, CA 95621-

If this is NOT correct, please contact us at your earliest convenience with the current address information. If we do not hear from you in the next few weeks, we will assume the address to be correct.

Thank you,
FreeFlyte Mgt.

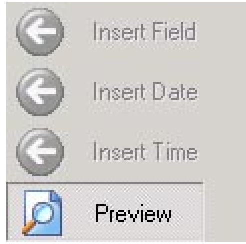
...and then advance through the database to view every instance (and how it will actually appear to the recipient) by clicking the navigation buttons in the lower right-hand corner:

Note that ProSchool indicates your current record and the total number of records ("12 of 186", etc.).

Using ProSchool's Email Utility

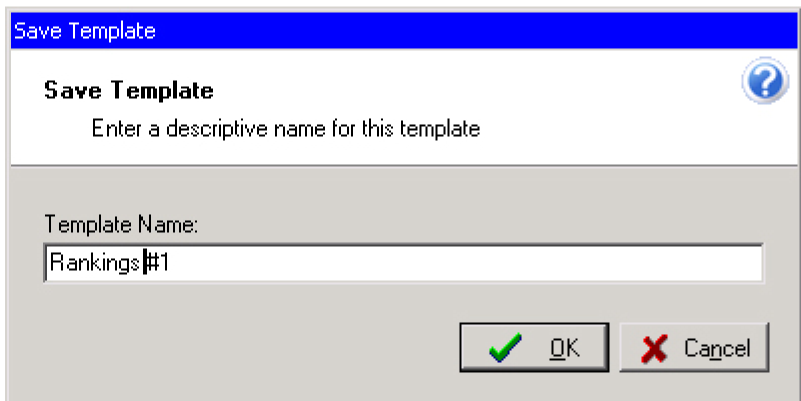
-continued-

The "Preview" button toggles between edit mode and preview mode. Therefore, when you are in the preview mode, the email message cannot be edited, and the field selection buttons are grayed out:



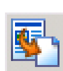
To return to edit mode, simply click the "Preview" button again.

7. If your school sends out recurring email communications, ProSchool allows you to save an email template for future use. To do so, first create the template, then click  to open the **Save Template** window and enter a name:



Click  to save the template and return to the Email window.

8. To delete a previously saved template, select it and click  to remove it from your templates list.

9. If you want to call up an existing (previously saved) template, click on it in the **Template** section and click  to load it. You can also make any changes to an existing template, then save it to reflect the updates you've made—or save it as a different name (which preserves the original template file). Note that if there are no saved templates, this button will be grayed out (inactive).

10. When your message is ready, click  to send it.

11. To compose a new e-mail, click  to clear the various text fields and proceed as described above.

Generating Reports in ProSchool

PROSCHOOL REPORTS: AN OVERVIEW

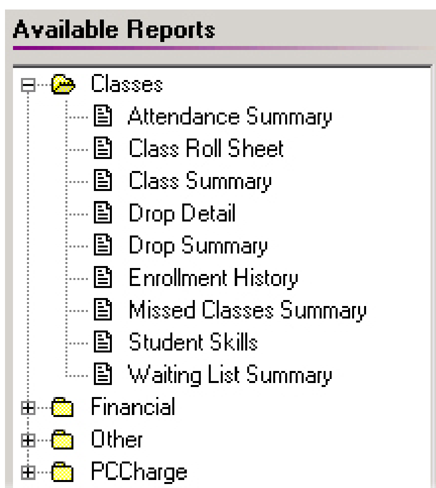
ProSchool's report generating function offers you 30+ different reports, each configurable to display exactly the information you seek. To effectively present and explain the elements that make ProSchool reports such a powerful tool, this section is organized as follows:

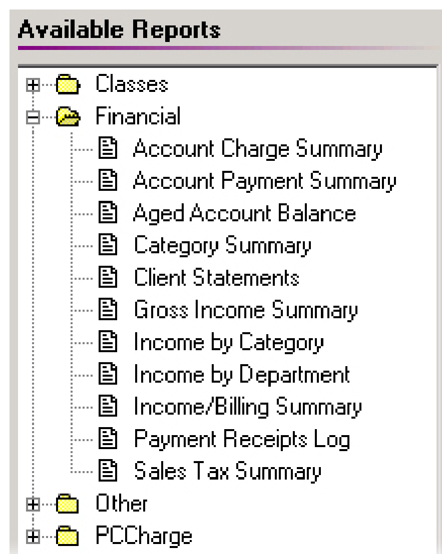
- explanation of the report hierarchy;
- overview of reports, by group, listing key features of each;
- a discussion on configuring and protecting custom "default" report settings;
- a discussion on the Sort utility (available in some reports);
- a discussion on using filter criteria (available in some reports);
- specific instructions for each report (listed alphabetically, within group):

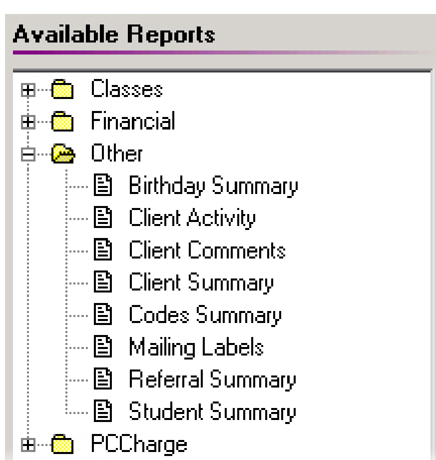
ProSchool's reports are organized into four general categories:

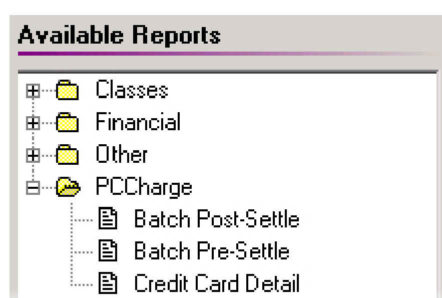
- **Classes** – relating to classes and enrollment;
- **Financial** – relating to tuitions, charges and payments;
- **Other** – a variety of reports pertaining to many other aspects of your school's operation;
- **PCCharge** – for credit card and ATM / Debit card transaction details and settlements.

The reports are accessed in the **Print Reports** window (via the main button bar). They are arranged categorically using a directory tree metaphor with collapsible branches:









Generating Reports in ProSchool

Per Windows convention, you can expand any of the three folders by clicking ⊞ immediately to the left of the folder in question, or collapse an expanded folder by clicking ⊟. You can also expand or collapse a folder by double-clicking on the folder name or the icon itself.

The features and options of each report are explained beginning on the next page.

Generating Reports in ProSchool

-continued-

A COMPENDIUM OF PROSCHOOL REPORTS

• ProSchool reports are organized into four general categories: "Classes", "Financial", "Other" and "PCCharge". The key features of each report are listed below.

The Classes category includes the following reports:

- **Attendance Summary** – Prints an attendance overview, by class, based on specific criteria, within a specified date range. Options:
  - all classes or selectable subset;
  - selectable by class type (Absent, Makeup, Present, Free or any combination of thereof);
  - three-level sorting based on configurable criteria.
- **Class Roll Sheet** – Generates class-specific roll sheets for instructors, within a specified date range (all classes or based on specific criteria). Options:
  - all classes or a specific subset;
  - attendance checkoff box configurable (every day offered, only a specified day, or no check box);
  - number of enrollment lines (actual number of Students enrolled / class limit / specific);
  - show Students on waiting list;
  - show makeup / free class Students;
  - add extra space before waiting list;
  - sort Students by teacher;
  - print roll sheets only for specified teacher;
  - print account balance;
  - show account balance / tuition code / teacher code / phone number;
  - print only classes with roll changes since a specific date;
  - modify report title;
  - modify font size of Student names and / or bold Student name;
  - three-level sorting based on configurable criteria.
- **Class Summary** – Generates class lists based on multiple criteria. Options:
  - list by Code, Level, Location, Manager, Teacher, Tuition, Type, Department;
  - all codes or selectable subset;
  - page break between groups;
  - show Students enrolled;
  - three-level sorting based on configurable criteria;
  - print labels for all classes that fit report criteria (handy for labeling file folders, etc.).

Generating Reports in ProSchool

-continued-

- **Drop Detail** – Generates lists of dropped Students based on multiple criteria. A useful tool for analysis of why Students leave your school and identifying related trends. Related to the Drop Summary report (next). Options:
  - start / end date range (or all);
  - drop reason codes to include (any / specific);
  - selectable filter criteria based on specific code type(s) (Class code, Class type, Location, Level, Teacher, Manager, Tuition);
  - three-level sorting based on configurable criteria;
  - print labels for all Students (or Clients of Students) who meet the report criteria.
- **Drop Summary** – Generates a report summarizing drops within a specified 12-month period (all or based on specific drop reason codes). As with the Drop Detail report, provides useful stats for periodic review of how many, and why, Students drop. Option:
  - drop reason codes to exclude (any / specific).
- **Enrollment History** – Generates a report of enrollment snapshots within a specified date range (based on specific criteria). Options:
  - total enrollment (all category types) or specific category (Class, Type, Level, Tuition, Location, Teacher or Manager);
  - within category types, by code (as previously configured by you).
- **Missed Classes Summary** – Lists Students who have missed classes. Options:
  - select class or subset of classes;
  - number of missed classes (1–4);
  - set and “as of” date.
- **Student Skills** – Generates a list of Students and their respective skills, based on multiple criteria. Options:
  - skill level - any or a selectable subset;
  - selectable by Student(s) - any or a selectable subset;
  - selectable by class - all or a selectable subset;
  - show hidden skills.
- **Waiting List Summary** – Lists Students that are currently on waiting lists for current or future classes. Option:
  - include Students from all classes with waiting lists, or specific classes;
  - page break between groups.

Generating Reports in ProSchool

-continued-

The Financial category includes the following reports:

- **Account Charge Summary** – By Client, shows all charges billed to an account since a specified date. Options:
  - subtotal by category;
  - show payment detail.
- **Account Payment Summary** – By Client, shows all payments since specified date. Option:
  - show all charge details.
- **Aged Account Balance** – Generates an aging schedule for all Client accounts based on specific criteria. Options:
  - aging categories (All, Current, 31+ days, 61+, 91+, 121+);
  - balance threshold (any amount or only accounts with balances meeting certain criteria);
  - show active Clients / inactive / both;
  - enrollment criteria (all classes or specific classes);
  - show Student/class detail for each Client;
  - print labels for all Clients who fit report criteria.
- **Category Summary –** Summarizes charges by category, based on specific criteria, within a specified date range. Options:
  - any or specific categories;
  - balance threshold (any amount or only accounts with balances meeting certain criteria);
  - show active Clients / inactive / both;
  - enrollment criteria (all or specific classes);
  - show Student/class detail for each Client;
  - three-level sorting based on configurable criteria;
  - print labels for all Clients or Students who fit report criteria.

Generating Reports in ProSchool

-continued-

- **Client Statements** – Generates Client statements based on specific criteria. Options:
  - all Clients, selected Clients or by selected classes;
  - active Clients, inactive Clients or both;
  - reprint statements for a specified Client only;
  - print borders around text blocks;
  - print account charge / payment activity;
  - print statements for e-mail Clients;
  - balance period (All, Current, 31+, 61+, 91+, 121+);
  - balance threshold (any amount or only accounts with balances meeting certain criteria);
  - category (any or specific);
  - dates (any or specific date range);
  - print labels for all Clients who fit report criteria;
  - select memo to be printed at bottom of statement (editable);
  - process e-mail statements.
- **Gross Income Summary** – Generates an income summary report based on payments posted within a specified date range. This report is a useful for “period ending...” analysis (monthly, quarterly, etc.). No Options.
- **Income by Category** – Itemized income by a specific category, or all categories, during a specific date range (defined by the date on which payment was received). Options:
  - show totals only.
- **Income by Department** – Itemized income by a specific department, or all departments, during a specific date range (defined by the date on which payment was received). Options:
  - show totals only.
- **Income/Billing Summary** – Generates a 12-month income summary report based on billings and actual payments received, beginning with a specified date (month / year). A useful tool for analyzing your receivables. Options:
  - show totals by category, or by department.
- **Payment Receipts Log** – Generates a detailed log of payments (either unposted, or within a specified date range). In ProSchool, this report is an integral part of the payment posting process. Options:
  - show summary only;
  - show the charges each payment was applied towards;
  - three-level sorting based on configurable criteria.
- **Sales Tax Summary** – Generates a report of all taxable sales within a specified date range. This report will save you time when dealing with the State on sales tax-related issues. Option:
  - three-level sorting based on configurable criteria.

Generating Reports in ProSchool

-continued-

The Other category includes the following reports:

- **Birthday Summary** – Generates a report showing all Students who have birthdays within a specified date range, and based on based on specific enrollment criteria. Using the "print labels" function makes it quick and easy to batch monthly birthday card mailings (if your school does that). Options:
  - start / end date range;
  - gender (male / female / both);
  - active Students, inactive or both;
  - enrollment criteria (all or specific classes);
  - three-level sorting based on configurable criteria;
  - print labels for all Clients or Students who fit report criteria.
- **Client Activity** – Generates lists of inactive or active Clients since a specified date. This report is a useful database maintenance tool because it allows you to ferret out old records from your school's database for reactivation or deletion. Options:
  - active Clients, inactive or both;
  - delete all records of Clients meeting criteria;
  - print labels for all Clients who fit report criteria.
- **Client Comments** – Generates a report of Client Comments (complete text) either for a specified Client or for all Clients. Results can be filtered by priority and status, and confined to a date range if desired. Options:
  - all or specified Clients;
  - sort by priority (any of specific) or status (any or specific);
  - start / end date range (or any);
  - three-level sorting based on configurable criteria.
- **Client Summary** – Lists Clients that meet specific search criteria. A powerful analytical tool, especially with large databases. Options:
  - multitiered filter (field / comparison / compare to);
  - active Clients, inactive or both;
  - enrollment criteria (all or specific classes);
  - three-level sorting based on configurable criteria;
  - print labels for all Clients who fit report criteria.
- **Codes Summary** – Generates a report of all codes you have configured for your school. A useful tool for periodic review of your school's codes. Option:
  - select any or all code categories for inclusion in the report (billing categories, class levels, class types, locations, referrals, drop reasons, tuitions, hourly / by Student rates, teachers / managers, cities.

- **Mailing Labels** – Generates labels of all types using any of numerous templates. Options:
  - multitiered filter (field / comparison / compare to);
  - active Students, inactive or both;
  - enrollment criteria (all or specific classes).
- **Referral Summary** – Generates a list of referrals within a specified 12-month period, beginning with a specified date (month / year), and is based on specific criteria. This is a useful tool for tracking referrals and cultivating referral sources. Option:
  - referral codes to exclude (any / specific).
- **Student Summary** – Generates lists of Students meeting specific criteria. Options:
  - multitiered filter (field / comparison / compare to);
  - active Students, inactive or both;
  - enrollment criteria (all or specific classes);
  - three-level sorting based on configurable criteria;
  - print labels for all Students who fit report criteria.

The PCCharge category includes the following reports:

- **Post-Batch Settle** – Generates a report of all settled PCCharge transactions. Options:
  - limit the report to transactions that were approved, declined, or both;
  - start / end date range.
- **Pre-Batch Settle** – Generates a report of all unsettled PCCharge transactions. Options:
  - limit the report to transactions that were approved, declined, or both;
  - start / end date range.
- **Credit Card Detail** – Generates a report of all PCCharge transactions that have occurred. Options:
  - limit the report to transactions that were approved, declined, or both;
  - start / end date range.

CUSTOMIZING PROSCHOOL REPORTS

As you are finding, ProSchool offers numerous options for configuring reports to best suit your needs. Once you "dial in" a given report to the configuration that best suits your needs—a process that can take time due to the experimentation involved—you can tell ProSchool to remember that specific configuration by clicking on one of the best time-savers in ProSchool:

This way, every time you select that particular report, it appears in the **ProSchool Reports** window exactly as you configured it. This saves you time because you don't have to *re*configure the report every time you call it up.

If onetime or occasional changes are made in the configuration to suit other reporting needs, ProSchool still returns to the default configuration every time that report is accessed anew—but only if the **Set As Default** button is *not* clicked after such changes are made.

If you are the only one using ProSchool, that's the end of the story. But what if you have others who also use ProSchool? Any user who changes a report configuration you've saved, and then clicks **Set As Default**—even if accidentally—just zapped the results of your experimentation and cost you more time!

You can prevent this from happening by doing the following:

- assign all users a username and password;
- configure the allow / deny options for both "Set default values" and "Override default values" in the **Security / Reports** section of the **ProSchool Configuration** window. This way, no one can accidentally (or intentionally) tamper with your default settings.

Security profiles are configured on an individual basis (by password) so you can customize every user's security profile so they can *only* go where you want them to.

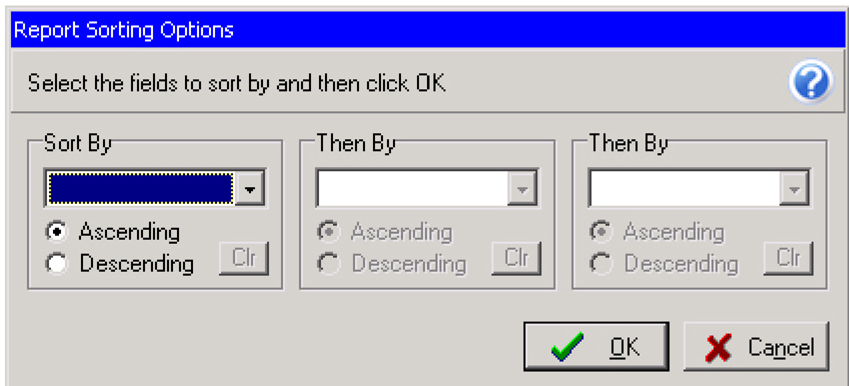
Using the Sort Utility In ProSchool Reports

1. Several ProSchool reports give you the option of sorting data to organize the results of your report. These include Attendance Summary, Birthday Summary, Category Summary, Class Roll Sheet, Class Summary, Client Comments, Client Summary, Codes Summary, Drop Detail, Mailing Labels, Payment Receipts Log, Sales Tax Summary and Student Summary reports. This sorting function is accessed by clicking on the **Sort** button found in each report's window.

-continued-

To use the Sort function:

1. Click on the **Sort** button found in the report's configuration section to open the **Report Sorting Options** window:



2. Click on the down-arrow in the **Sort By** section and choose the type of data you want ProSchool to use in its first-level sort.

Note: The **Sort By** / **Then By** / **Then By** options are context-sensitive so they vary among reports. However, all three sort levels will contain the same options within a given report.

3. Indicate the sort order you want ProSchool to use for the selected field data by selecting either **Ascending** (lowest to highest, A to Z) or **Descending** (highest to lowest, Z to A).

Hint: To clear the criteria selected in any sort level section, click the appropriate **Clr** *button.*

4. To tighten the specificity of your report, click on the down-arrow in the middle **Then By** section and choose the type of data you want ProSchool to use in its second-level sort. Indicate the sort order desired (**Ascending** or **Descending**).

5. To tighten the specificity of your report further, click on the down-arrow in the right **Then By** section and choose the type of data you want ProSchool to use in its third-level sort. Indicate the sort order desired (**Ascending** or **Descending**).

For example, let's say you want to print a **Class Roll Sheet** report sorted as follows:

- first, by teacher name in ascending order (first to last alphabetically);
- second, by class level in ascending order (beginning to advanced);
- third, by maximum number of Student enrollment per class in descending order (largest to smallest class size).

Generating Reports in ProSchool

The configuration based on the above criteria would look like this:

-continued-

Based on the above criteria the roll sheets for those classes would be sorted, and would print, in the following order:

Order	Actual Class Title	Teacher	Level	Max
1	Advanced Girl's Gymnastics	Bubba Luigi	ADVF - Advanced-Female	6
2	Advanced Boy's Gymnastics	Bubba Luigi	ADVM - Advanced-Male	10
3	Olympic Prep - Boy's	Bubba Luigi	ADVM - Advanced-Male	6
4	Competitive Boy's Gymnastics	Bubba Luigi	ADVM - Advanced-Male	6
5	Introductory Gymnastics - Coed	Bubba Luigi	BEG - Beginning	12
6	Intermediate Boy's Gymnastics	Bubba Luigi	INTM - Intermediate male	10
7	Olympic Prep - Girl's	Olga Slevetski	ADVF - Advanced Female	6
8	Competitive Girl's Gymnastics	Olga Slevetski	ADVF - Advanced Female	4
9	Tumbling & Coordination	Olga Slevetski	BEG - Beginning	12
10	Intro to Competitive Gymnastics	Olga Slevetski	BEG - Beginning	12
11	Intermediate Girl's Gymnastics	Olga Slevetski	INTF - Intermediate Female	10
12	Tumbling Toddlers	Olga Slevetski	INTR - Introductory	15
13	Tumbling Toddlers	Olga Slevetski	INTR - Introductory	10

Note: The "Actual Class Title" column is shown to differentiate classes that otherwise appear to be duplicates (3–4, 9–10); it was not actually a sorting criterion in this example.

In the above sort results, you will note that all of teacher Bubba Luigi's classes (1-6) occur first because his name occurs alphabetically before Olga Slevetski's (7-13). Then, within groups with identical teacher names and levels the order is determined by the "Max Students" criterion (2–4, 7–8, 9-10, 12–13).

Hint: The best way to familiarize yourself with the sorting function used in ProSchool reports is to select any report that uses the sort function and experiment with the various criteria in the **Report Sorting Options** *window. Then, click* **Preview...** *to see the results. Page through to observe how different sort criteria impact the report order. When you're done viewing the results, click*  *to return to the* **Report Sorting Options** *window where you can experiment further with different sorting criteria. Nothing you do will change the ProSchool databases, so try whatever comes to mind.*

USING FILTER CRITERIA IN PROSCHOOL REPORTS

Some ProSchool reports are based on your school's entire Client and / or Student population(s), which for large schools could number in the hundreds or even thousands. This can result in extremely long reports that aren't always necessary. For this reason, ProSchool offers you the ability to filter your report results to a more manageable and practical length, particularly in situations where you don't need entire populations on a given report.

The reports that draw from the complete database of Clients and Students, and which can potentially result in huge reports, are:

- Client Summary;
- Student Summary;
- Mailing Labels.

These reports each contain a **Field** / **Comparison** / **Compare To** data matrix so they are easy to identify at a glance:

The **Field:** defines your first (or only) search criterion. ProSchool gives you tremendous power and flexibility in that you can configure the **Field:** entry based on virtually any type of data found in the **Client Information** and **Student Information** windows:

- Student-related data: Student_ID, Client ID, First name, Last Name, Birthday, Sex, Date Registered, Date Quit, Comments, Fixed Monthly, Fixed Session, Fixed Weekly, Flag1, Flag1 Date, Flag1 Memo, Flag2, Flag2 Date, Flag2 Memo, Flag3, Flag3 Date, Flag3 Memo, Flag4, Flag4 Date, Flag4 Memo, Entered By, Entered On, Updated By, Updated On;
- Client-related data: Client ID, First Name, Last Name, Middle Init, Company, Address1, Address2, City, State, Zip, Home Phone, Fax Phone, Work Phone, Emergency Phone, Work Contact, Emergency Contact, Credit, Referral Code, Phone Type, Alt Payor Phone, Alt Payor, Email, Mail List Flag, Entered By, Entered On, Updated By, Updated On.

Generating Reports in ProSchool

-continued-

The **Comparison:**, or ”operator”, determines the type of test ProSchool will apply to your data. For each tier, you configure the potential search range to possibilities that are one of the following:

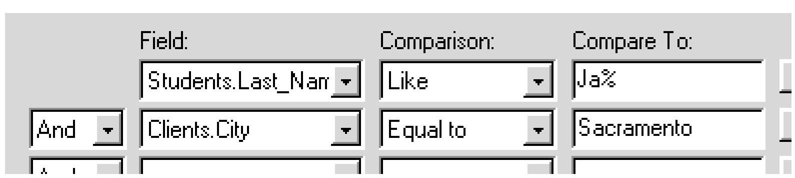
- *equal to* the Operand (“=”),
- *not equal to* the Operand (“<>”);
- *greater than* the Operand (“>”);
- *less than* the Operand (“<”);
- *greater than or equal to* the Operand (“>=”);
- *less than or equal to* the Operand (“<=”).
- *blank* only (no data);
- *non-blank* only (any data regardless of type);
- *like* (for finding matches using the “?” and “%” wildcard characters);
- *not like* (for finding *non*-matches using the “?” and “%” wildcard characters).

Comparisons are used for numerical values *and* for alphabetical characters sorted in standard alphabetical order (defined as values beginning with “a”—the lowest value—and ascending in value to “z”).

The “**?**” (for a single character) and “**%**” (for multiple characters) wildcard characters are used when you only know part of a word. For example, if you were searching for a name with a spelling you were unsure of—such as Lahttenskaya—entering “La%” would return all names beginning with “La” regardless of how the remainder of the name was spelled.

The **Compare to:** field (technically known as the ”operand”) is the piece of data to which ProSchool will apply the test you define using the Field(s) and Comparison(s). The **Compare to:** value can be a number (such as an amount), name, date or other piece of information.

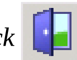
Comparisons work on alphabetical characters as well as numerals. For example, if you wanted to search the Student database for all Students whose last name started with “Ja” (Jaanmar, Jaeger, James, etc.), *and* further limit the search to those Students who lived in Sacramento, you would enter the following choices and data into the first two tiers:



The operator **Like** tells the search engine to begin the search with any name that is alphabetically *like* operand “Ja” (specified in **Compare to:**). Note that the wildcard character “%” is tacked onto the end of “Ja”. This tells ProSchool to return any name beginning with “Ja” regardless of the rest of the name’s spelling (remember, the “%” character is the wildcard for multiple characters while the “?” character is the wildcard for single characters; if you had wanted to limit your search to three-letter names starting with “Ja”, you would have used the “?” instead).

The second condition, or tier, begins with the **And** designation. It further instructs the search engine to limit the results to Clients who live in Sacramento by using the “Equal to” operand. With this criteria, ProSchool would return results whose Clients had “Sacramento” as their city of record.

Generating Reports in ProSchool

Hint: The best way to familiarize yourself with the filter function used in ProSchool reports is to select any report that uses the filter data matrix and experiment with the various criteria in the **Field**, **Comparison** *and* **Compare To** *fields. Then, click* **Preview...** *to see the results. Page through to observe how different filter criteria impact the report results. When you're done viewing the results in the* **Print Preview** *window, click*  *to return to the* **Print Reports** *window where you can experiment further with different filter criteria. Nothing you do will change the ProSchool databases, so try whatever comes to mind.*

-continued-

Generating Reports in ProSchool

-continued-

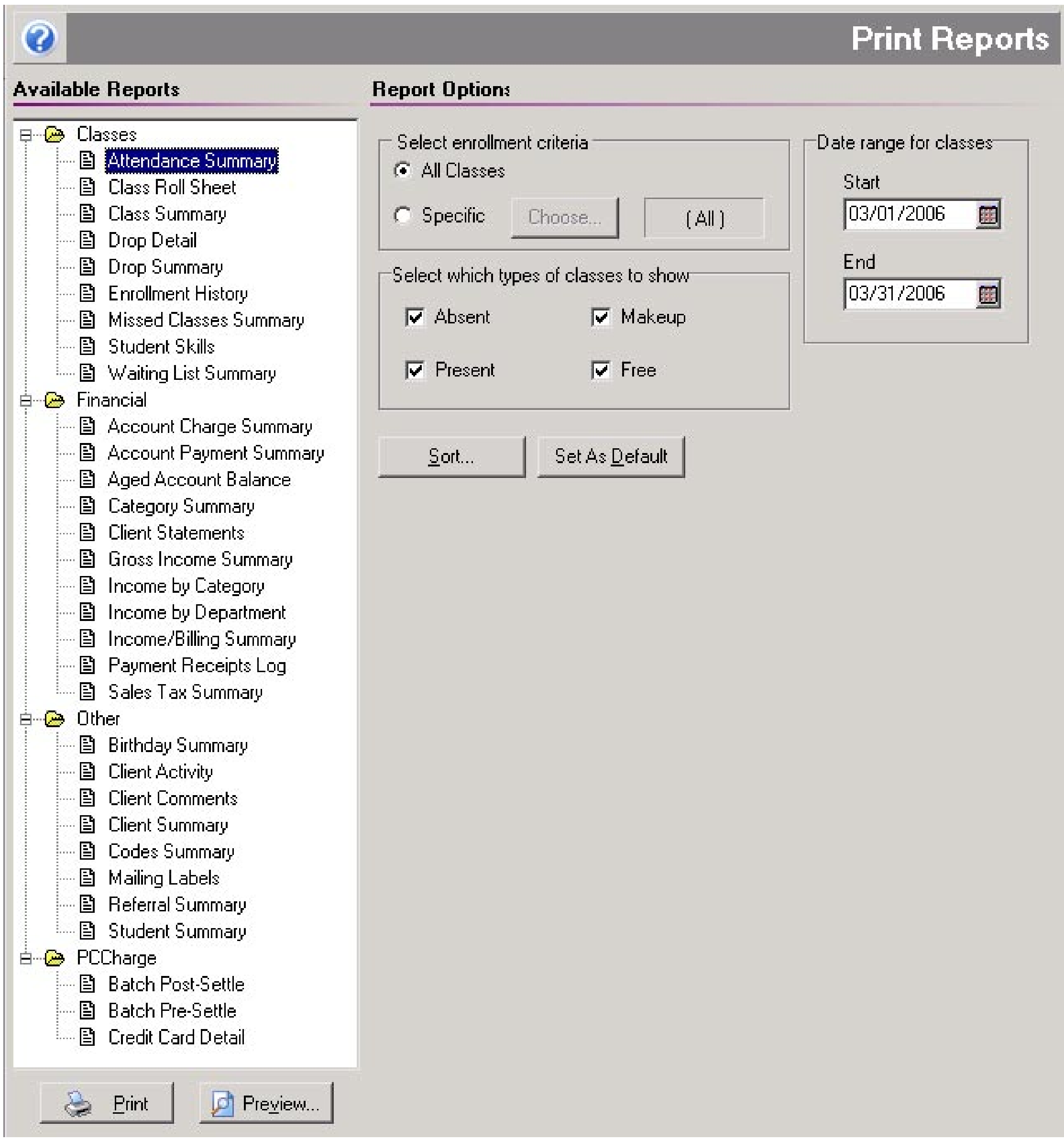
■ Starting the Report Building Process

ProSchool's report generating function is powerful yet easy to use. Many of the 31 available reports are highly configurable as well, for additional versatility.

To generate a report:

1. Click 

to open the **Print Reports** window:



All ProSchool classes are displayed on the left in the **Available Reports** section (the folders are collapsible if you want to hide the report titles in a given folder). When you click on a given report title, the configuration options available for the selected report appear in the **Report Options** section.

■ CLASSES - ATTENDANCE SUMMARY (shown on previous page)

• *Generates summary of attendance data recorded for all classes (or selected subset of classes) within a specific date range.*

1. In the **Available Reports:** section, select Classes / Attendance Summary.

2. In the **Select enrollment criteria** section, you can configure enrollment criteria to filter your report's results (if you don't wish to filter report results based on class enrollment criteria, skip to step #3).

To print a summary that includes *all* classes, click **All Classes** in the **Select enrollment criteria** section. Otherwise, select **Specific**, click **Choose...** and use the **Search for a Class** window to select the classes you want to include in this report. If you choose a specific class or subset of classes (as opposed to "All Classes"), the legend "(Subset)" appears immediately to the right of the **Choose...** button; if all classes are chosen, the legend "(All)" appears there. You can choose multiple classes by holding down the **Ctrl** key while clicking on the classes you want.

3. In the **Select which types of classes to show** section, you can select **Absent**, **Present**, **Makeup** or **Free**—or any combination of them—to tailor the report results to your needs.

4. In the **Date range for classes** section, select the appropriate date range (**Start** and **End**) for the report.

5. You can further sort your print results by Class Code, Attendance Date and Attendance Type by clicking the **Sort...** button. This opens the **Sort Utility** window (explained previously), which allows you to configure hierarchical sort parameters (up to three levels).

6. ProSchool allows you to save this report configuration if you wish, which comes in handy if you use a given report configuration most frequently. To do so, double-check your configuration options, then click the **Set as Default** button.

7. Click 

to print the report without previewing it.

OR...

8. Click 

to preview the report on your screen *before* sending it to the printer. The **Print Preview** window offers you several options:

• blue **left-to-beginning** / green **left-one-page** arrows – to move backward (toward first page);

• green **right-one-page** / blue **right-to-end** arrows – to move forward (toward last page);

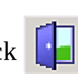
• Zoom menu – offers several viewing magnifications from **10%** to **Whole Page**:

• Progress gage – indicates ProSchool's report-generating progress in real time;

• print – to print the report;

• help – opens ProSchool's context-sensitive help window;

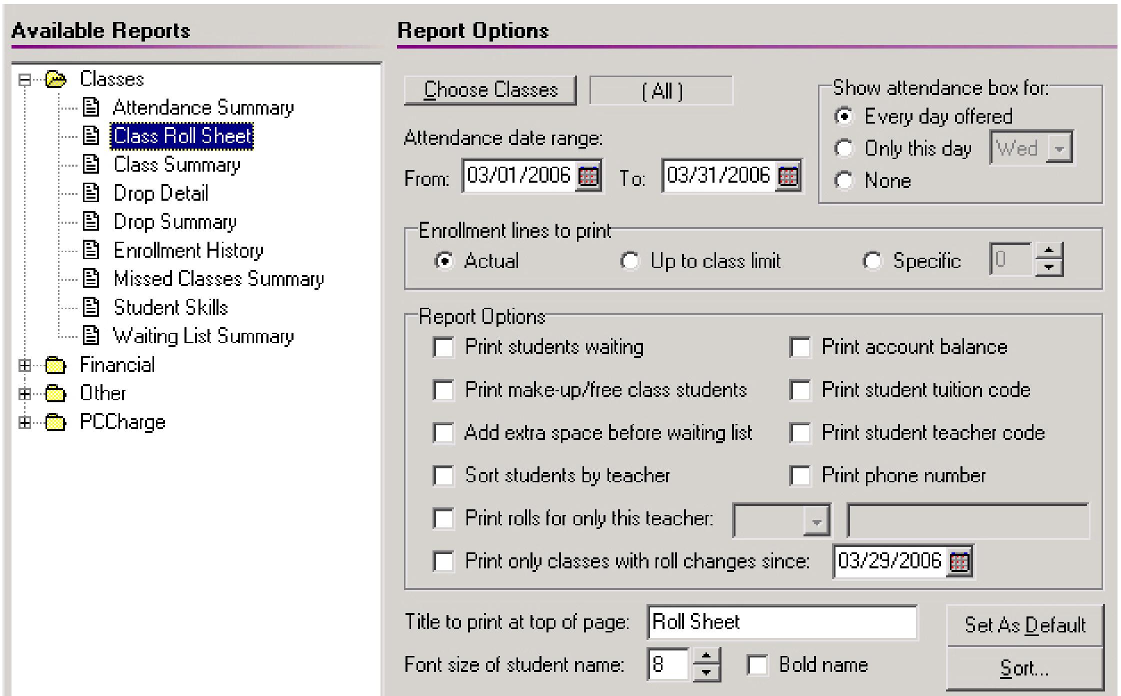
• close window – closes the **Print Preview** window and returns you to the **ProSchool Reports** window.

Note: To stop the report building process at any time, click  to close the **Print Preview** window and return to the **Print Reports** window.

CLASSES - CLASS ROLL SHEET

• *Generates class roll sheets based on multiple criteria.*

1. In the **Available Reports:** section, select Classes / Class Roll Sheet:



2. Click **Choose Classes** to open the **Search for a Class** window. Subsets of multiple classes can be selected by holding down the **CTRL** key while clicking on the desired classes.

3. In the **Attendance date range** section, select the appropriate date range (**Start** and **End**) for the report.

4. In the **Show attendance box for:** section, select one of the following:

• **Every day offered -** an attendance box will be shown for *every* day on which the given class is offered;

• **Only this day -** a *specific* day of the week (selected with the drop-down menu), or;

• **None -** to *eliminate* attendance boxes from the printout entirely.

5. In the **Enrollment lines to print** section, select one of the following:

• **Actual -** an enrollment line will print for *every* Student enrolled in a given class;

• **Up to class limit -** an enrollment line will be printed for every available slot in the class (as defined in the class's "max students" parameter (even if the number of Students currently enrolled in the class is less than the maximum allowed);

• **Specific -** only a *specific* number of enrollment lines will be printed (selected with the drop-down menu).

6. In the **Report Options** section, you can customize the report to include additional elements, sort Students by teacher, and print only those classes with roll changes since a specified date.

7. To name the report something other than "Roll Sheet", enter your preferred title in the **Title to print at top of page** field. If you want this new title to be the default title for this report for future printouts, click **Set As Default**.

Generating Reports in ProSchool

-continued-

8. To change the default font size for Student names (8 point size), click the up or down arrows in the **Font size of student name** section to select the desired font size.

9. To further sort your print results by a variety of criteria, click the **Sort...** button to open the **Sort Utility** window, which allows you to configure hierarchical sort parameters (up to three levels).

10. To preview the report on your screen before sending it to the printer, click 

(as explained above in the in Attendance Summary report).

OR...

11. Click 

to print the report without previewing it.

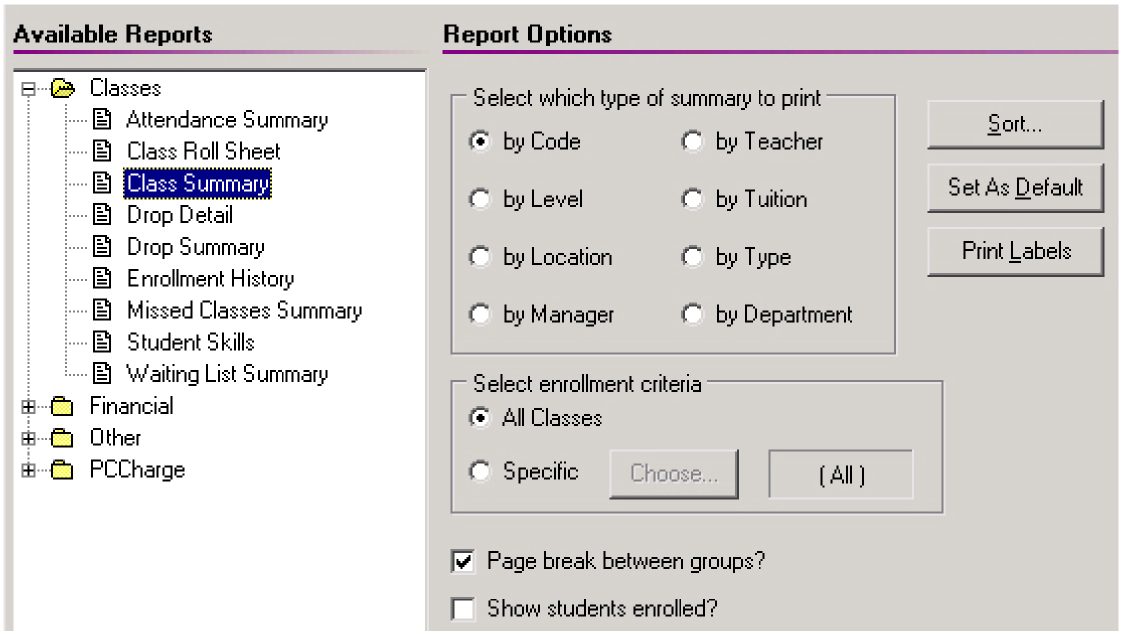
Generating Reports in ProSchool

-continued-

CLASSES - CLASS SUMMARY

- *Generates class lists based on multiple criteria.*

1. In the **Available Reports:** section, select Classes / Class Summary:



2. Select how you wish ProSchool to organize your report by making the appropriate selection in the **Select which type of summary to print** section.

3. In the **Select enrollment criteria** section, you can configure enrollment criteria to filter your report's results (if you don't wish to filter report results based on class enrollment criteria, skip to the next step). To select a specific class or subset of classes for use in determining which classes appear on the report, select **Specific**, then select **Choose...** to open the **Search for a Class** window, where you can select a class.

4. Select **Page break between groups?** if you want data for each subsequent group to start printing on a new page.

5. If you want the report to list all Students enrolled for each class included in the report, select **Show students enrolled?**.

6. To sort the report results to a greater degree of specificity, click **Sort...** to open the **Report Sorting Options** window. Select the appropriate criteria and click **OK** to return to the **Print Reports** window (or click **Cancel** to return and discard any changes made to the sort criteria, whether new or modified).

7. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

8. Click 

to preview the report on your screen before sending it to the printer.

OR...

9. Click 

to print the report without previewing it.

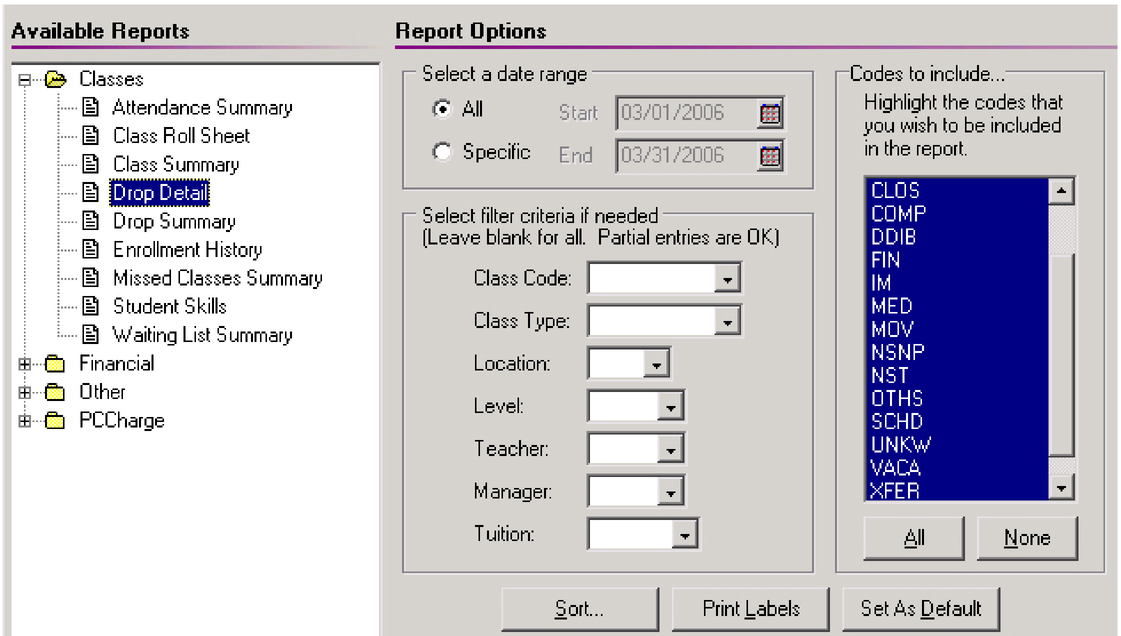
Generating Reports in ProSchool

CLASSES - DROP DETAIL

• *Generates lists of dropped Students based on multiple criteria. A useful tool for analysis of why Students leave your school and identifying related trends. Related to the Drop Summary report (next).*

-continued-

1. In the **Available Reports:** section, select Classes / Drop Detail:



2. In the **Select a date range** section, select the appropriate date range (**Start** and **End**) for the report.

3. In the **Select filter criteria if needed** section, you can configure the various drop-down menus to narrow the focus of the report.

4. In the **Codes to include...** section all reasons are selected by default. To select a single reason only, click on it. To select a unique subset of reasons (some but not all), hold down the **CTRL** key while clicking on the specific reasons you want included in the report.

5. To sort the report results to a greater degree of specificity, click **Sort...** to open the **Report Sorting Options** window. Select the appropriate criteria and click **OK** to return to the **Print Reports** window (or click **Cancel** to return and discard any changes made to the sort criteria, whether new or modified).

6. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

7. To print labels for all names matching your report criteria, click **Print Labels**. The **Print Labels** window will open, showing you the names which meet the criteria, and giving you the option of using the Student's or parent's (Client) name on the label.

8. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

9. Click 

to preview the report on your screen before sending it to the printer.

OR...

10. Click 

to print the report without previewing it.

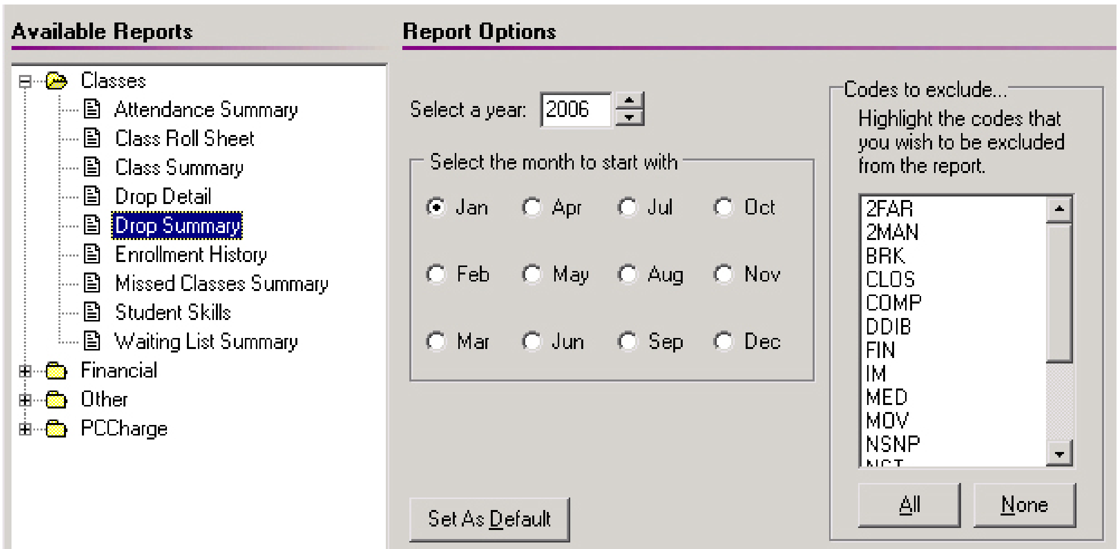
Generating Reports in ProSchool

-continued-

■ CLASSES - DROP SUMMARY

• *Generates a report summarizing drops within a specified 12-month period; based on all or specific drop reason codes. As with the Drop Detail report, provides useful stats for periodic review of why and how many of your Students drop.*

1. In the **Available Reports:** section, select Classes / Drop Summary:



2. Select the year in which the report will start either by entering it in the **Select a year:** field or using the up- and down-arrow buttons.

3. Select the month in which you wish to begin your report in the **Select the month to start with** section. (For an entire *calendar* year of activity, select **Jan**.)

4. To *exclude* Students from the report that were dropped for specific reasons, you can select the codes you wish to exclude from the report by selecting them in the **Codes to exclude...** section. For example, to include all Students on the Drop Summary report *except* those who were dropped for behavioral reasons, you would select **Bhvr**. The **All** and **None** buttons can be used to select or unselect all reason codes with a single click. To select a unique subset of reasons for exclusion (some but not all), hold down the **CTRL** key while clicking on the specific reasons you want excluded from the report.

5. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button (default settings are discussed at the beginning of this section—see "Customizing ProSchool Report Configurations").

6. Click 

to preview the report on your screen before sending it to the printer.

OR...

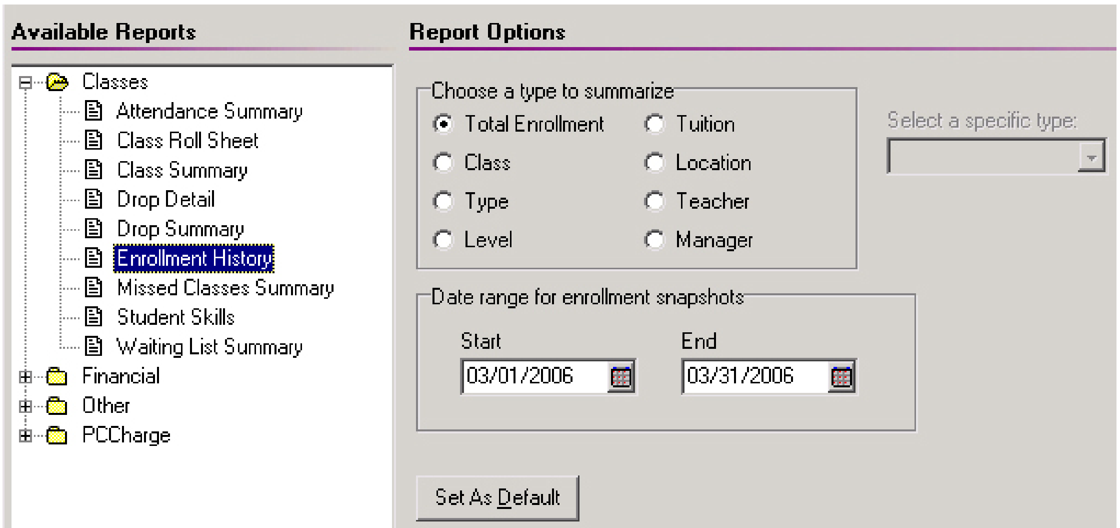
7. Click 

to print the report without previewing it.

CLASSES - ENROLLMENT HISTORY

• *Generates a report of enrollment snapshots within a specified date range (all or based on specific criteria).*

1. In the **Available Reports:** section, select Classes / Enrollment History:



2. In the **Choose a type to summarize** section, select “Total Enrollment” if you want enrollment shapshots of your entire school population to be included in the report. Otherwise, select from any of the other choices. You can then further narrow your report by selecting an option from the “Select a specific type” drop-down menu.

3. Select the “start” and “end” dates for the report by entering them in the **Date range for enrollment snapshots** field.

4. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

5. Click Print Preview to preview the report on your screen before sending it to the printer.

OR...

6. Click Print to print the report without previewing it.

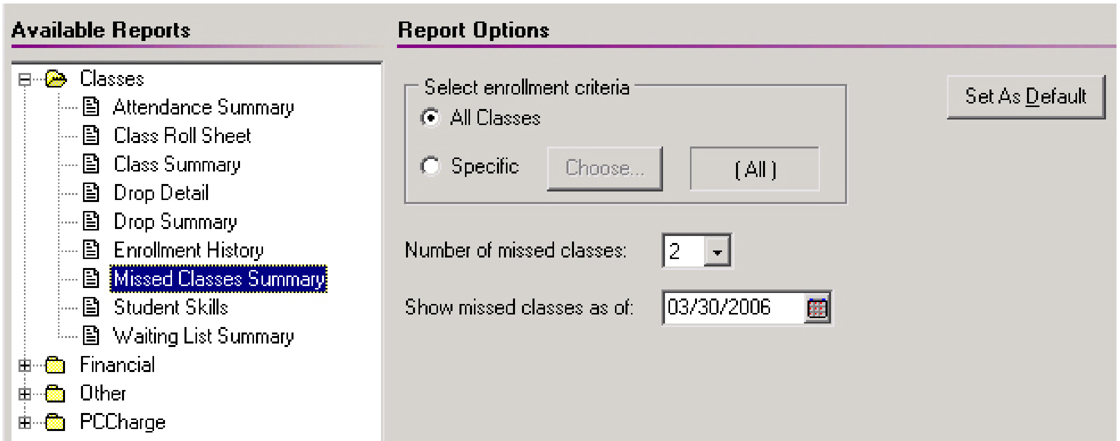
Generating Reports in ProSchool

-continued-

■ CLASSES - MISSED CLASS SUMMARY

• *Lists Students that have missed a specified minimum number of classes (any classes or specified classes) since a specified date.*

1. In the **Available Reports:** section, select Classes / Missed Class Summary:



2. In the **Select enrollment criteria** section, you can configure enrollment criteria to filter your report's results (if you don't wish to filter report results based on class enrollment criteria, skip to the next step). To select a specific class or subset of classes for use in determining which Students appear on the report, select **Specific**, then select **Choose...** to open the **Search for a Class** window, where you can select a class.

3. In the **Number of missed classes** section, use the up or down arrows to specify the minimum number of classes the Student must have missed in order to appear on this report.

4. In the **Show missed classes as of:** section, specify the date on which, and prior to which, missed class activity will be reflected in the report (for example, based on the report configuration shown above, the report would show every Student who had missed two or more classes on or before 3/30/2006).

5. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

6. Click 

to preview the report on your screen before sending it to the printer.

OR...

7. Click 

to print the report without previewing it.

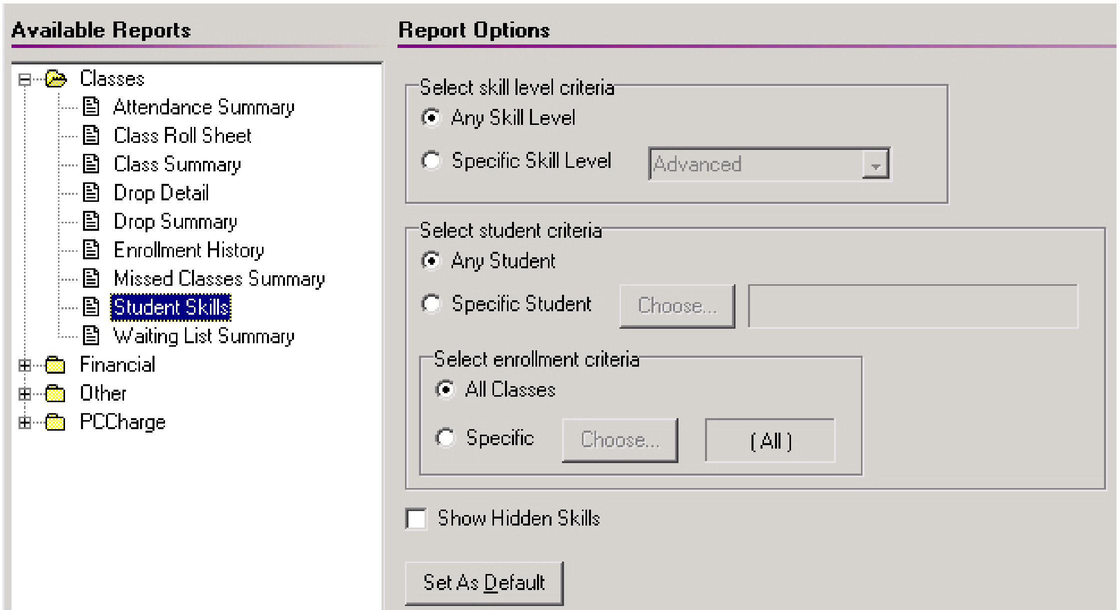
Generating Reports in ProSchool

-continued-

Classes - Student Skills

• *Lists Skills, by Student, according to the report parameters you specify.*

1. In the **Available Reports:** section, select Classes / Student Skills:



2. In the **Skill Level Criteria** section, specify **Any Skill Level** (to include Students in the report regardless of Skill Level), or **Specific Skill Level** (which you can filter by using the drop-down menu).

3a. In the **Select student criteria** section, select **Any Student** (to include all Students in the report population regardless of skill set), or **Specific Student** (which you can select in the **Search for a Student** window that opens).

3b. If you select “Any Student” in 3a, above, your can also specify enrollment criteria in the **Select enrollment criteria** subsection. Select **All Classes** (to populate the report with Students regardless of which classes they’re taking), or **Specific** (to select a specific class—or subset of classes—in the **Search for a Class** window that opens).

4. To include Students’ hidden skills on the report select, **Show Hidden Skills**.

5. Click 

to preview the report on your screen before sending it to the printer.

OR...

6. Click 

to print the report without previewing it.

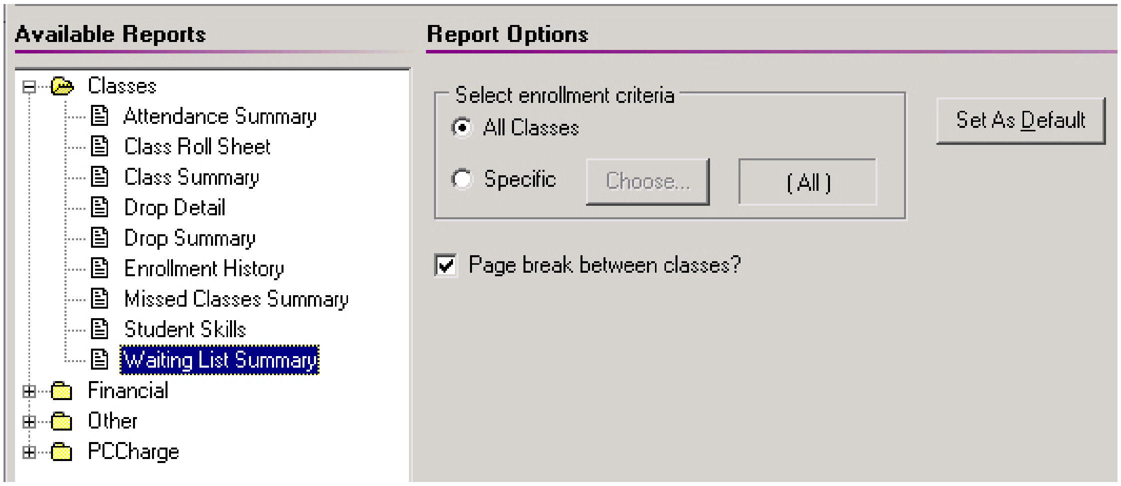
Generating Reports in ProSchool

-continued-

Classes - Waiting List Summary

• *Lists Students that are currently on waiting lists for current or future classes (all or specific classes).*

1. In the **Available Reports:** section, select Classes / Waiting List Summary:



2. In the **Select enrollment criteria** section, you can configure enrollment criteria to filter your report's results (if you don't wish to filter report results based on class enrollment criteria, skip to the next step). To select a specific class or subset of classes for use in determining which Students appear on the report, select **Specific**, then select **Choose...** to open the **Search for a Class** window, where you can select a class.

3. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

4. Click 

to preview the report on your screen before sending it to the printer.

OR...

5. Click 

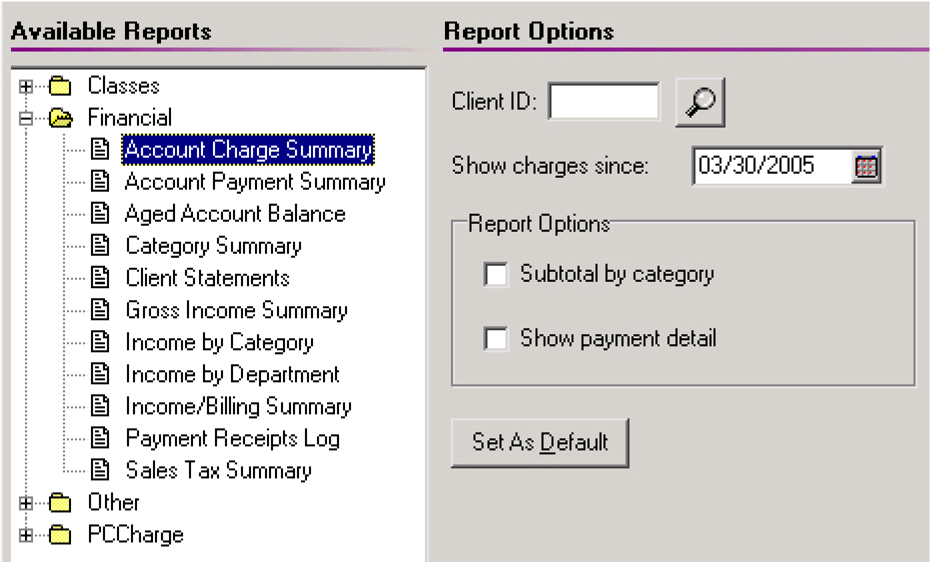
to print the report without previewing it.

-continued-

FINANCIAL - ACCOUNT CHARGE SUMMARY

• *By Client, shows all charges billed to an account since a specified date.*

1. In the **Available Reports:** section, select Financial / Account Charge Summary.



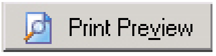
2. Select a Client (if you don't know the Client's ID number, click to open the **Search for a Client** window and select the Client).

3. In the **Show charges since:** field, enter the date you wish the report to begin with.

4. In the **Report Options** section, select **Subtotal by category** if you wish ProSchool to organize your report by charge categories. Otherwise, the report will list all charges in chronological order.

5. In the **Report Options** section, select **Show payment detail** if you want ProSchool to include the specific detail of any payments applied to the charges included in the report. Otherwise, charges will appear without payment details.

6. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

7. Click 

to preview the report on your screen before sending it to the printer.

OR...

8. Click 

to print the report without previewing it.

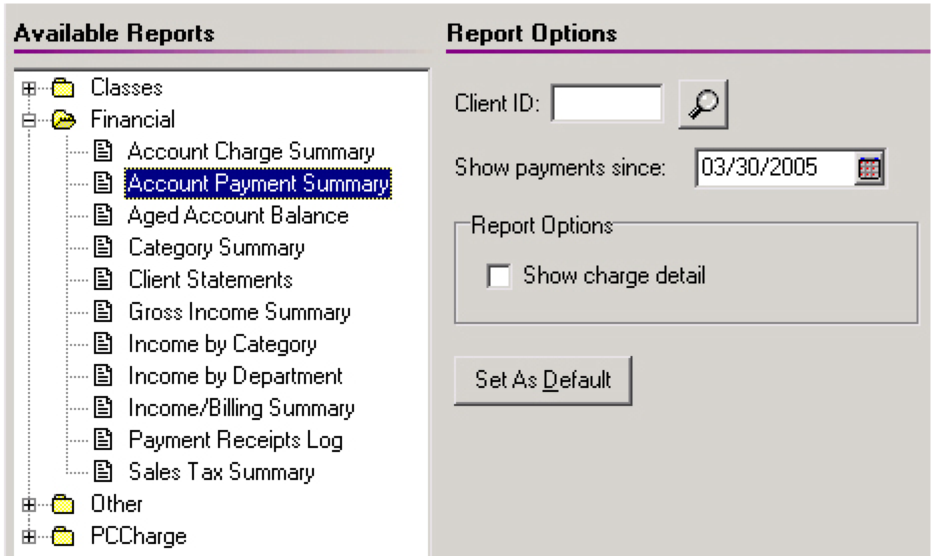
Generating Reports in ProSchool

-continued-

FINANCIAL - ACCOUNT PAYMENT SUMMARY

• *By Client, lists all payments received since a specified date.*

1. In the **Available Reports:** section, select Financial / Account Payment Summary:



2. Select a Client (if you don't know the Client's ID number, click  to open the **Search for a Client** window and select the Client).

3. In the **Show payments since:** field, enter the date you wish the report to begin with.

4. In the **Report Options** section, select **Show charge detail** if you want ProSchool to include the specific detail of any charges to which the payments in the report were applied. Otherwise, payments will appear without charge details.

5. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

6. Click 

to preview the report on your screen before sending it to the printer.

OR...

7. Click 

to print the report without previewing it.

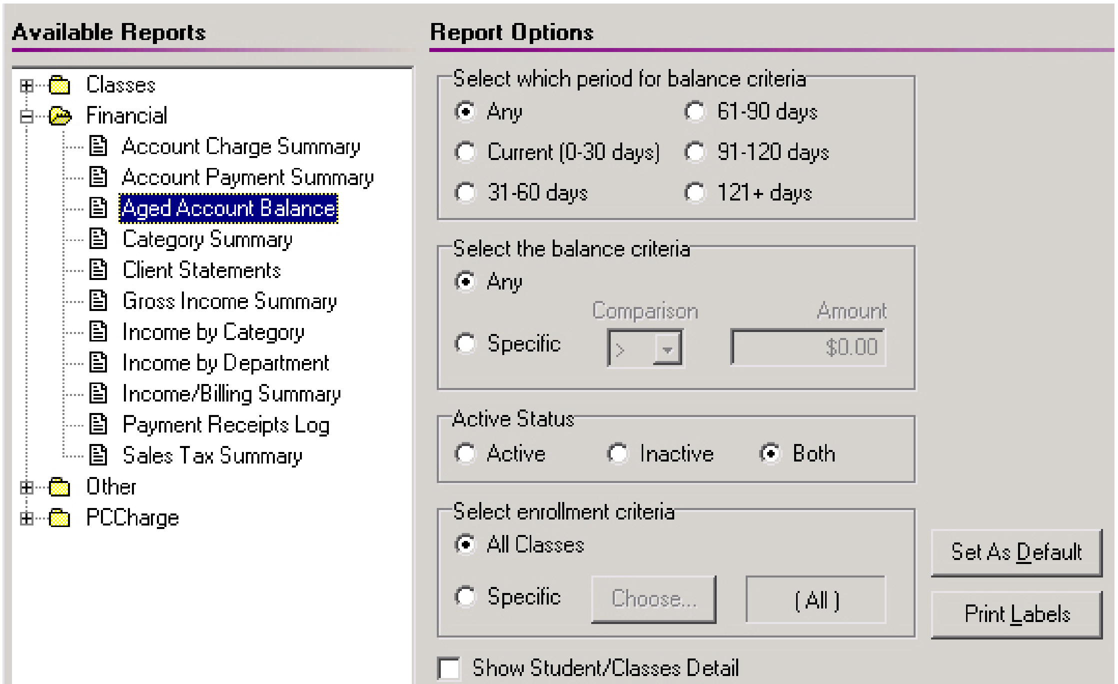
Generating Reports in ProSchool

-continued-

FINANCIAL - AGED ACCOUNT BALANCE

• *Generates an aging schedule for all Client accounts based on specific criteria.*

1. In the **Available Reports:** section, select Financial / Aged Account Balance:



2. Select aging criteria in the **Select which period for balance criteria** section.

3a. In the **Select the balance criteria** section, click **Any** (to include all aged accounts regardless of their balance);

OR...

3b. Click **Specific**, then click on the down-arrow at the right of the **Comparison** field and select the operator you wish to use:

"**=**" selects only those accounts whose balance equals the **Amount** value;

"**< >**" selects only those accounts whose balance is less than or greater than, but not equal to, the **Amount** value;

"**<**" selects only those accounts whose balance is less than the **Amount** value;

"**>**" selects only those accounts whose balance is greater than the **Amount** value;

"**<=**" selects only those accounts whose balance is less than or equal to the **Amount** value;

"**>=**" selects only those accounts whose balance is greater than or equal to the **Amount** value;

*Hint: The "**>**" (greater than) symbol is most typically used because it simply returns all aged accounts with a balance in excess of a specified amount (as determined by the value you enter in the **Amount** field). This is useful, for example, if you establish a policy allowing Clients to carry small balances over to the next billing period without penalty or additional collection efforts. The term "small" is arbitrary, of course, and is determined by you).*

Generating Reports in ProSchool

-continued-

3c. In the **Amount** field, enter the threshold balance amount you wish the chosen operator to use in its search.

4. In the **Active Status** section, select one of the following:

- **Active** if you want ProSchool to include only “active” accounts (Clients with at least one Student enrolled in a class);
- **Inactive** if you want the report to include only “inactive” accounts (those Clients with *no* Students currently enrolled in any classes);
- **Both** (the default) if you want the report to show all aged accounts.

5. In the **Select enrollment criteria** section, you can configure enrollment criteria to filter your report’s results (if you don’t wish to filter report results based on class enrollment criteria, skip to the next step). To select a specific class or subset of classes for use in determining which Clients appear on the report, select **Specific**, then select **Choose...** to open the **Search for a Class** window, where you can select a class.

Upon return to the **Print Reports** window, look in the **Select enrollment criteria** section. Note that the term “(Subset)” now appears there (if you selected a class or some classes in the previous **Search for a Class** window). The term “(All)” appears whenever no class-specific criteria has been selected.

6. If you want your report to show Student and class details, select the **Show Student/classes detail** option. All Clients will be displayed, and with each Client, each of their Students and the classes each is enrolled in. Otherwise, deselecting **Show Student/classes detail** will result in a report showing only Client listings.

7. To print labels for all names matching your report criteria, click **Print Labels**. The **Print Labels** window will open, showing you the names which meet the criteria, and giving you the option of using the Student’s or parent’s (Client) name on the label.

8. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button (default settings are discussed at the beginning of this section—see “Customizing ProSchool Report Configurations”).

9. Click 

to preview the report on your screen before sending it to the printer.

OR...

10. Click 

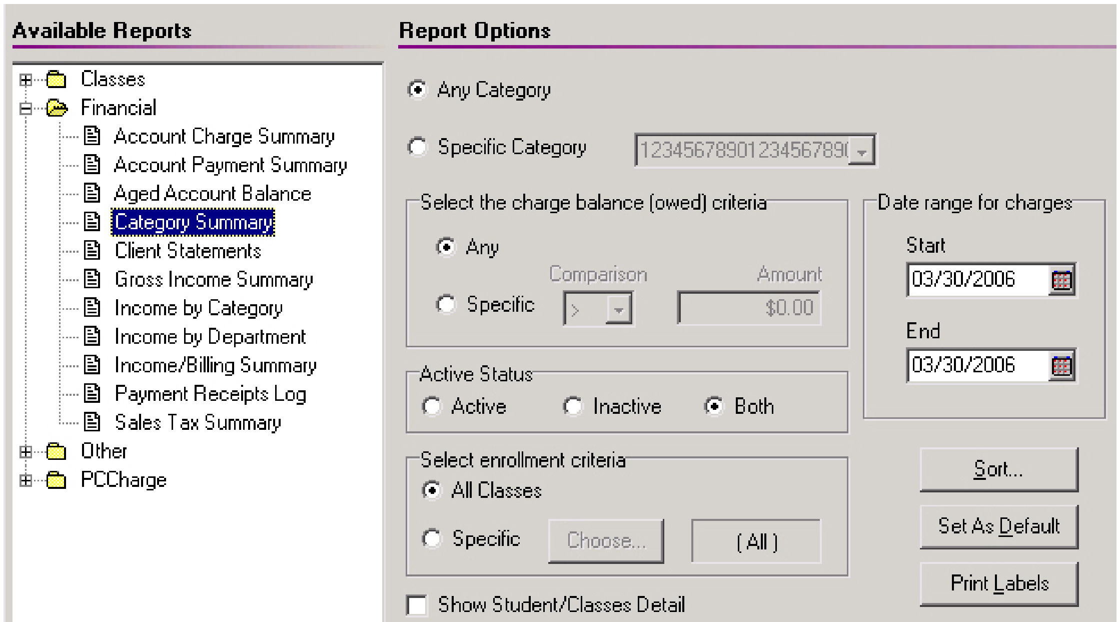
to print the report without previewing it.

-continued-

FINANCIAL - CATEGORY SUMMARY

• *Summarizes charges by category, based on specific criteria.*

1. In the **Available Reports:** section, select Financial / Category Summary:



2. Select the **Any Category** option to include charges from all categories. To limit the report to a certain category, select **Specific Category**, then use the drop-down menu immediately to the right to select the category you want.

3. In the **Select the charge balance owed criteria** section, click **Any** (to include all categories regardless of their balance owing);

OR...

4a. Click **Specific**, then click on the down-arrow at the right of the **Comparison** field and select the comparison (“operator”) you wish to use:

“**=**” selects only those accounts whose balance of the selected category(s) equals the **Amount** value;

“**< >**” selects only those accounts whose balance of the selected category(s) is less than or greater than, but not equal to, the **Amount** value;

“**<**” selects only those accounts whose balance of the selected category(s) is less than the **Amount** value;

“**>**” selects only those accounts whose balance of the selected category(s) is greater than the **Amount** value;

“**<=**” selects only those accounts whose balance of the selected category(s) is less than or equal to the **Amount** value;

“**>=**” selects only those accounts whose balance of the selected category(s) is greater than or equal to the **Amount** value;

*Hint: The “**>**” (greater than) symbol is most typically used because it simply returns all accounts with category balances in excess of a specified amount (as determined by the value you enter in the* **Amount** *field).*

Generating Reports in ProSchool

-continued-

4b. In the **Amount** field, enter the threshold balance amount you wish the chosen operator to use in its search.

5. In the **Active Status** section, select one of the following:

- **Active** if you want the report to include the selected category balance(s) only from *active* accounts;
- **Inactive** if you want to include selected category balance(s) only from *inactive* accounts;
- **Both** (the default) if you want the report to show *all* accounts.

6. If you want the report to include category balances from all Students regardless of class enrollment status, skip to step #7. To select a specific class or subset of classes for use in determining which Students appear on the report, click **Choose Classes** to open the **Search for a Class** window. Select the class or subset of classes you want and click **OK** to return to the **Print Reports** window (or **Cancel** to return there).

7. In the **Select enrollment criteria** section, you can configure enrollment criteria to filter your report's results (if you don't wish to filter report results based on class enrollment criteria, skip to the next step). To select a specific class or subset of classes for use in determining which Clients appear on the report, select **Specific**, then select **Choose...** to open the **Search for a Class** window, where you can select a class.

8. If you want your report to show Student and class details, select the **Show Student/Classes Detail** option. All Clients will be displayed, and with each Client, each of their Students and the classes each is enrolled in. Otherwise, deselecting **Show Student/Classes Detail** will result in a report showing only Client listings.

9. Indicate the date range for charges by selecting the appropriate dates in the **Date range for charges** section.

10. To sort the report results to a greater degree of specificity, click **Sort...** to open the **Report Sorting Options** window. Select the appropriate criteria and click **OK** to return to the **Print Reports** window (or click **Cancel** to return and discard any changes made to the sort criteria, whether new or modified).

11. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

12. To print labels for all names matching your report criteria, click **Print Labels**. The **Print Labels** window will open, showing you the names which meet the criteria, and giving you the option of using the Student's or parent's (Client) name on the label.

13. Click 

to preview the report on your screen before sending it to the printer.

OR...

14. Click 

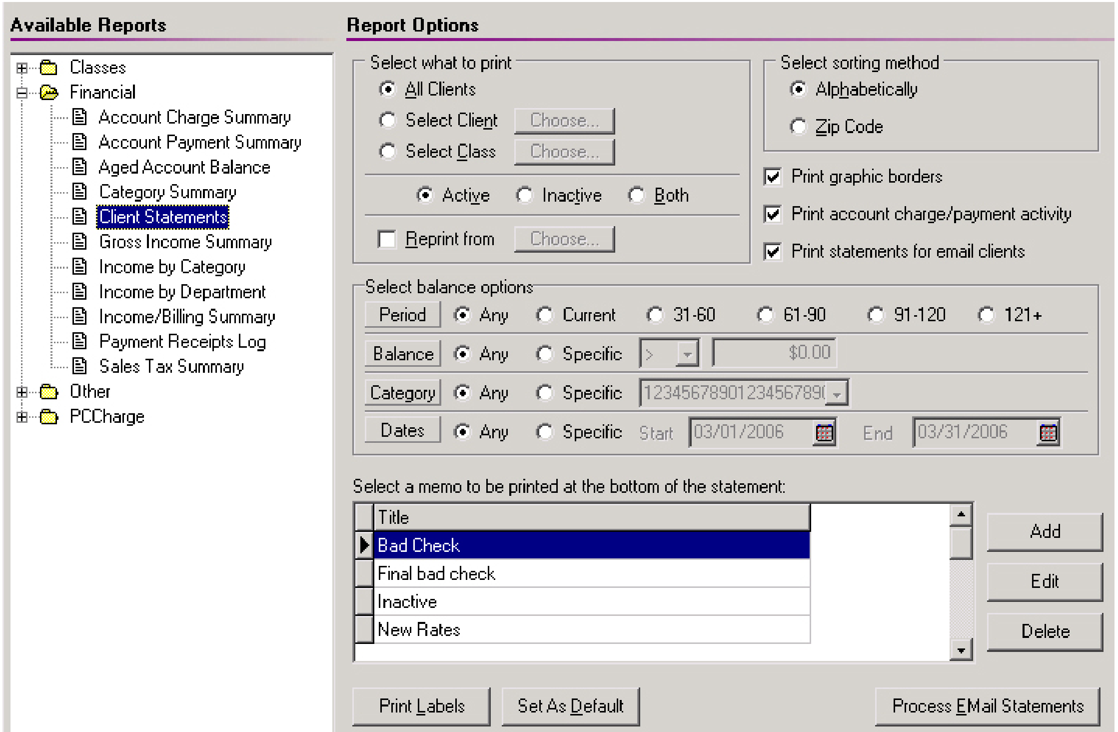
to print the report without previewing it.

-continued-

FINANCIAL - CLIENT STATEMENTS

• *Generates Client statements according to your criteria.*

1. In the **Available Reports:** section, select Financial / Client Statements:



2. In the **Select what to print** section, select *one* of the following:

- **All Clients** – to print statements for all Clients;
- **Select Client** – opens the **Search for a Client** window where you can specify a single Client for whom you can print a statement;
- **Select Class** – opens the **Search for a Class** window where you can specify a single class or subset of classes, and print statements only for those Clients with Students enrolled in that class (or subset of classes).
- **Reprint From** – allows you to reprint Client statements, subject to the above parameters, starting with any Client selected via the **Choose...** button. (This option is handy if you already printed statements, but your printer ran out of paper part way through the print job. This option tells ProSchool to regenerate statements for all Clients meeting the specified criteria, but only reprints those starting with the name you specify.)

Note: If you select **All Clients**, you must also select **Active**, **Inactive** or **Both** in the **Select what to print** section (if the **All Clients** option is not selected, the **Active/Inactive/Both** section will be grayed out).

3. Select the desired sort order in the **Select sorting method** section (**Alphabetically** or by **Zip Code**).

4. To constrain text blocks within borders, select **Print graphic borders**. As with any other variables, you can experiment without actually printing by viewing the contents and layout of your report using the **Preview** button.

Generating Reports in ProSchool

-continued-

5. To include Client account charge and payment history on the statements, select **Print account charge/payment activity**.

6. For Clients who are set up to receive their statements via e-mail, ProSchool gives you the option to print a hard copy for mailing, archiving, etc. To do so, select **Print statements for email clients**.

7. Configure the **Select balance options** section to further narrow the results of your report (i.e., to determine more specifically which Clients to print statements for). By default, this section's options are set to **Any**, which tells ProSchool to generate statements *regardless* of aging (current or overdue), *regardless* of the amount of a Clients's account balance, *regardless* of any categories associated with the charges that comprise the existing account balance, and *regardless* of any arbitrary date range.

To narrow down the field of Clients to whom you will print statements, proceed as follows:

- to filter by *billing period* (i.e. the age of outstanding balances), make the appropriate selection in the **Select balance options** section (**Any**, **Current**, **31-60**, **61-90**, **91-120**, **121+**);
- to filter by *account balance*, select **Specific**, then select the comparison ("operator") you wish to use, and a threshold dollar amount (detailed in the instructions for the previous report);
- to filter by *category*, select **Specific**, then use the drop-down menu to select the desired category;
- to filter by *date range*, select **Specific**, then use the drop-down menu to select the desired **Start** and **End** dates.

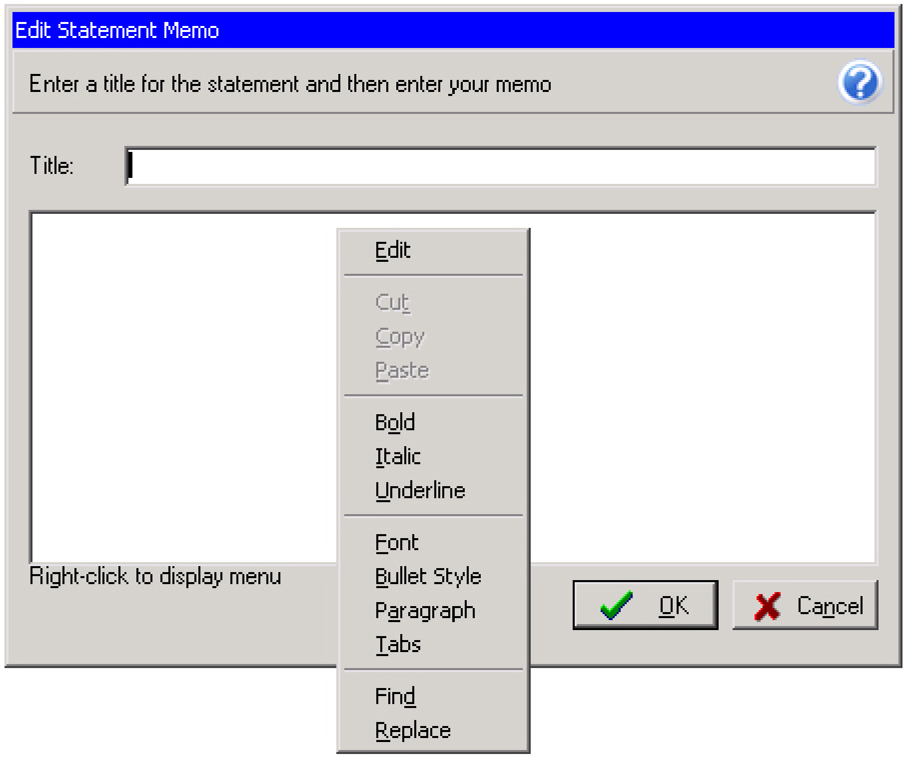
While monthly billing cycles typically include all Clients, you may wish to handle older accounts differently than newer ones. For example, you may wish to specify a different message to be printed at the bottom of the statement for Clients with severely delinquent accounts. (The message option is discussed below.)

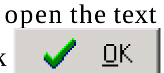
One option is to generate statements in two runs: the first run would use the **Current** option and includes a note of appreciation for the prompt payments ("Thank you for your prompt payment!", etc.). The second run would use the 31+ option and includes a message on the statements such as, "Have you overlooked your payment this month? Please remit as soon as possible. Thank you.", etc.).

Generating Reports in ProSchool

-continued-

8a. To place a message at the bottom of each statement, select the memo of choice in the **Select a memo to be printed at the bottom of the statement:** section. If you wish to add or edit a memo, click the **Add** button, or select the memo you wish to edit and click the **Edit** button, to open up the **Edit Statement Memo** window:



For additional features, right-click anywhere on the text field to open the text menu (shown above). Create a new memo—or edit an existing one—then click 

to save it (or 

to abandon your changes and close the window).

Note that ProSchool includes the current memo in this default setting; therefore, it will be the memo that prints when you generate Client statements using the default settings.

8b. to delete an existing memo, select it and click **Delete**.

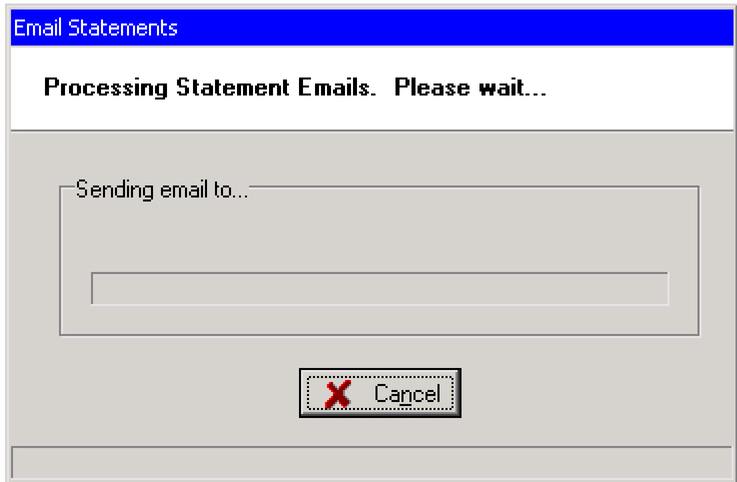
9. To print labels for all names matching your report criteria, click **Print Labels**. The **Print Labels** window will open, showing you the names which meet the criteria, and giving you the option of using the Student's or parent's (Client) name on the label.

10. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

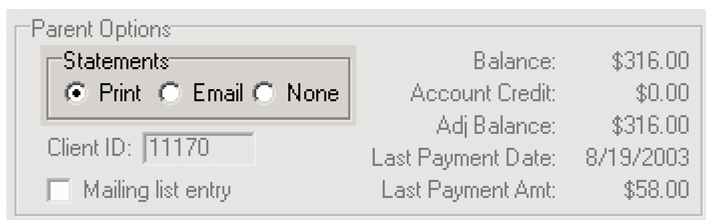
Generating Reports in ProSchool

-continued-

11. To process statements only for Clients who are set up to be billed via e-mail, click **Process EMail Statements**. The **Email Statements** window will open to indicate progress:



Note that the **Process EMail Statements** option only generates statements to Clients set up to receive them, as configured previously in the **Parent Options** section of the **Family Information** window:



This is explained in detail on page 142 in the section entitled "Adding Families To Your School's Database".

12. Click 

to preview the report on your screen before sending it to the printer.

OR...

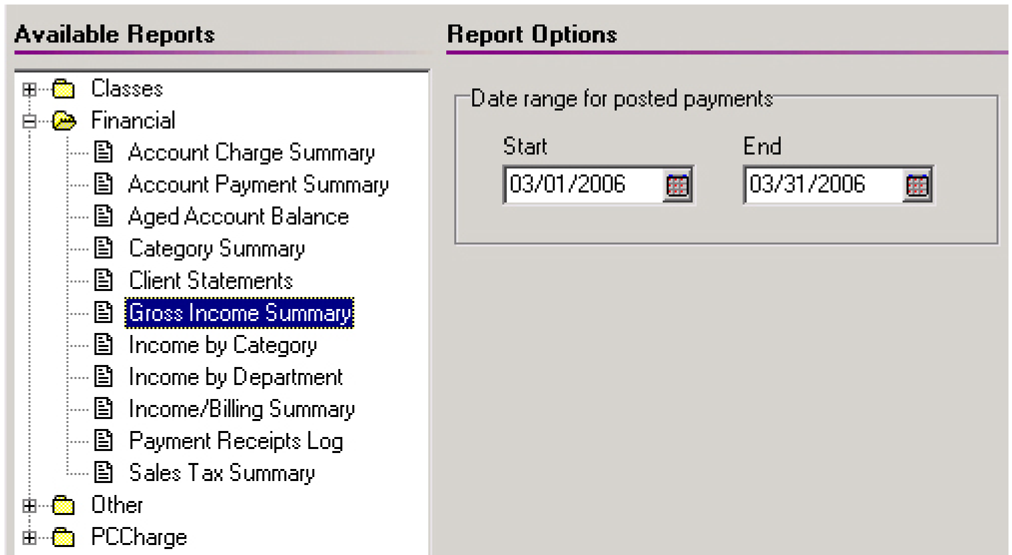
13. Click 

to print the report without previewing it.

FINANCIAL - GROSS INCOME SUMMARY

• *Generates an income summary report based on payments posted within a specified date range. This report is a useful for "period ending..." analysis (monthly, quarterly, etc.).*

1. In the **Available Reports:** section, select Financial / Gross Income Summary:



2. Select the "start" and "end" dates for the report by entering them in the **Date range for posted payments** field.

3. Click  to preview the report on your screen before sending it to the printer.

OR...

4. Click  to print the report without previewing it.

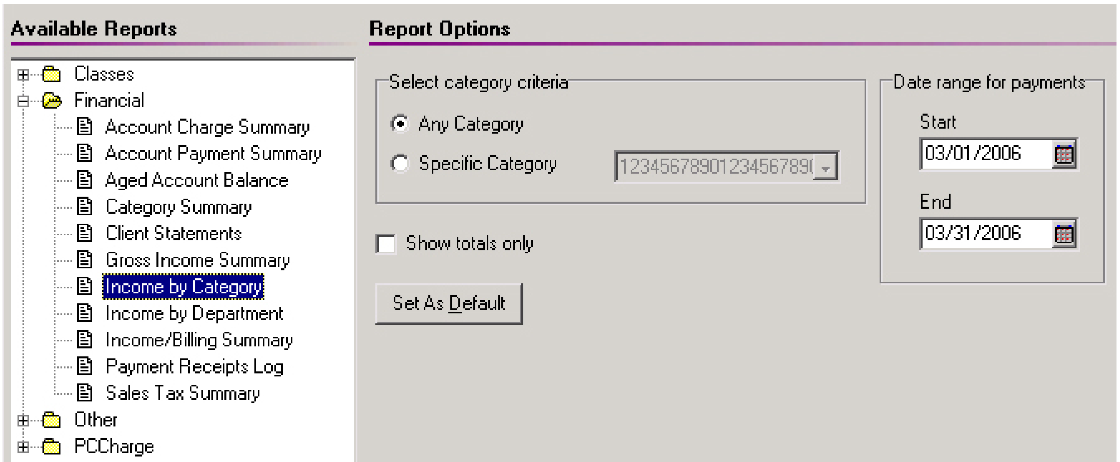
Generating Reports in ProSchool

-continued-

FINANCIAL - INCOME BY CATEGORY

• *Generates an income summary broken down by category.*

1. In the **Available Reports:** section, select Financial / Income by Category:



2. In the **Select Category Criteria** section, select **Any Category** (to include all categories in the report that have income), or **Specific Category** (if you want to print income for only one specific category).

3. In the **Date range for payments** section, indicate the date range for received payments that you want reflected in this report.

4. To generate an abbreviated version of this report in which only totals are shown, select **Show totals only**.

5. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

6. Click 

to preview the report on your screen before sending it to the printer.

OR...

7. Click 

to print the report without previewing it.

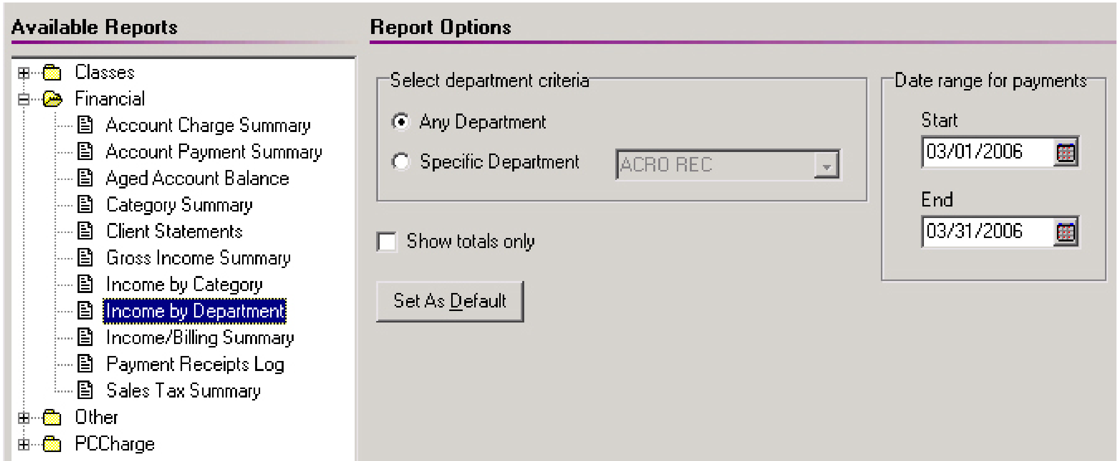
Generating Reports in ProSchool

-continued-

FINANCIAL - INCOME BY DEPARTMENT

• *Generates an income summary broken down by department.*

1. In the **Available Reports:** section, select Financial / Income By Department:



2. In the **Select Department Criteria** section, select **Any Department** (to include all departments in the report that have income), or **Specific Department** (if you want to print income for only one specific department).

3. In the **Date range for payments** section, indicate the date range for received payments that you want reflected in this report.

4. To generate an abbreviated version of this report in which only totals are shown, select **Show totals only**.

5. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

6. Click 

to preview the report on your screen before sending it to the printer.

OR...

7. Click 

to print the report without previewing it.

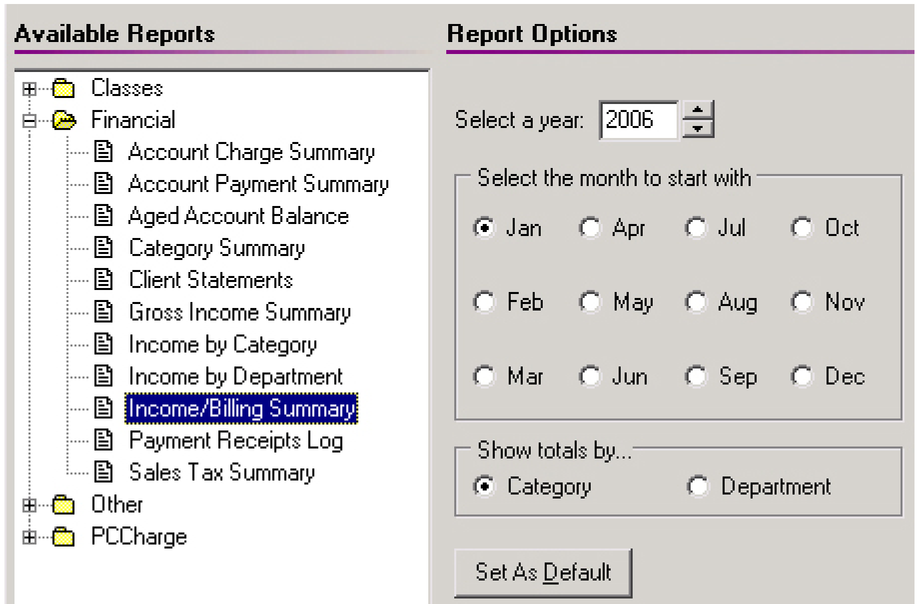
Generating Reports in ProSchool

-continued-

■ FINANCIAL - INCOME / BILLING SUMMARY

• *Generates a 12-month income summary report based on billings and actual payments received, beginning with a specified date (month/year). A useful tool for analyzing your receivables.*

1. In the **Available Reports:** section, select Financial / Income/Billing Summary:



2. Select the year in which the report will start either by entering it or using the up- and down-arrow buttons in the **Select a year:** field.

3. Select the month in which you wish to begin your report in the **Select the month to start with** section. (For an entire calendar year of activity, select **Jan**.)

4. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

5. Click 

to preview the report on your screen before sending it to the printer.

OR...

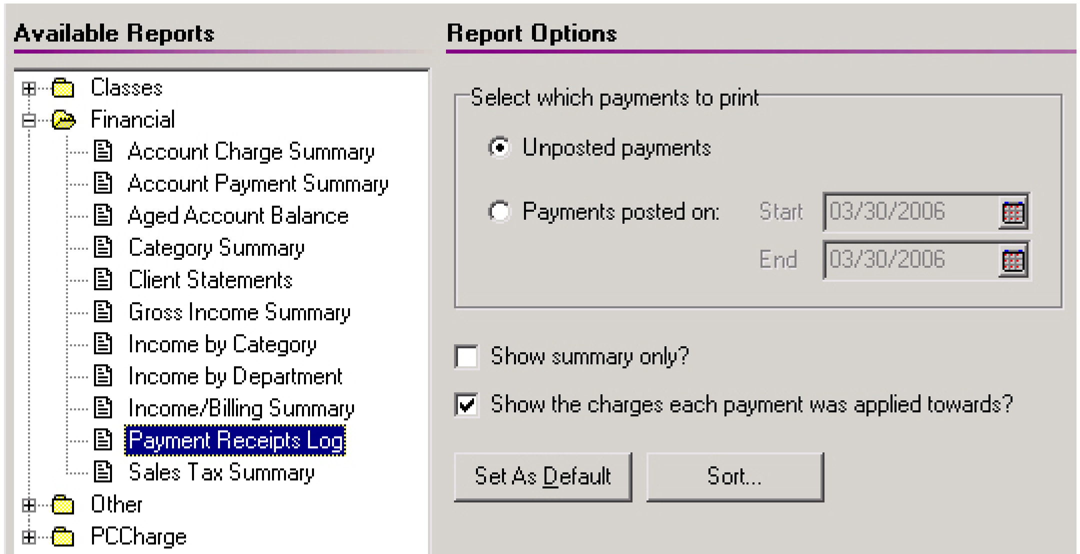
6. Click 

to print the report without previewing it.

FINANCIAL - PAYMENT RECEIPTS LOG

• *Generates a detailed log of all unposted payments or all payments posted on a specified date.*

1. In the **Available Reports:** section, select Financial / Payment Receipts Log:



2. In the **Select which payments to print** section, indicate which payments you want in the report as follows:

• select **Unposted payments** if you want the report to include *only* unposted payments—that is, only those payments received since the last post;

OR...

• select **Payments posted on:** and specify a start and end date if you want to filter this report to include only those payments that occurred within a specific time frame.

3. To print a summary only (i.e., an abbreviated version of this report that does *not* include detail on individual payments), select **Show summary only?**.

4. If you want this report to show greater detail by including a breakdown of the charges toward which each payment in the report was applied, select **Show the charges each payment was applied toward?**.

5. To sort the report results to a greater degree of specificity, click **Sort...** to open the **Report Sorting Options** window. Select the appropriate criteria and click **OK** to return to the **Print Reports** window (or click **Cancel** to return and discard any changes made to the sort criteria, whether new or modified).

6. Click  to preview the report on your screen before sending it to the printer.

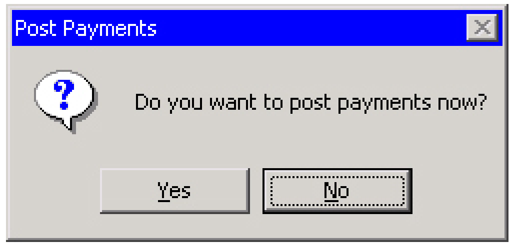
OR...

7. Click  to print the report without previewing it.

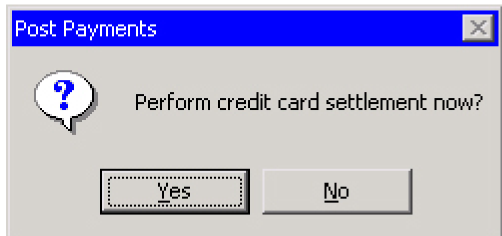
Generating Reports in ProSchool

-continued-

8. After printing, or after previewing the report in Print Preview, ProSchool will attempt to post payments. A confirmation dialog box will appear:



If you are *not* PCCharge-enabled, skip to step #9. Otherwise, click **Yes** and a second dialog box will appear (clicking **No** aborts the process):



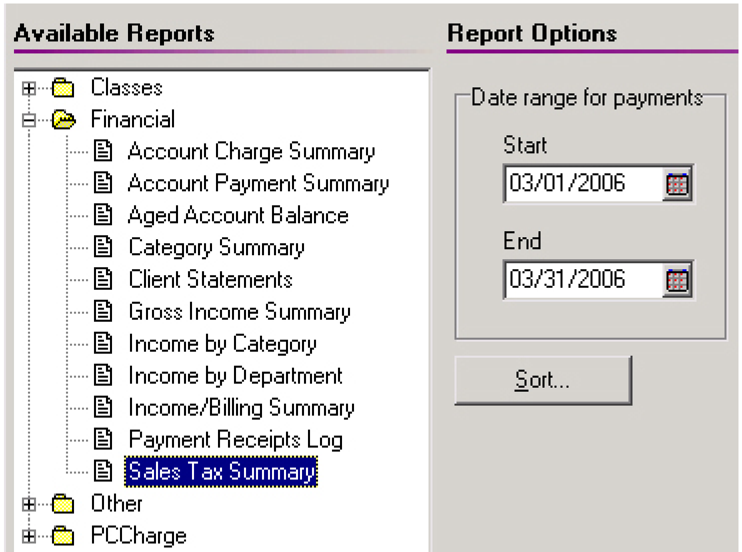
If you click **Yes** ProSchool connects to your merchant services provider and settles the credit card transactions. When done, the following confirmation appears:

9. After ProSchool is done posting payments, the following message will appear:

FINANCIAL - SALES TAX SUMMARY

• *Generates a report of all taxable sales within a specified date range. This report will save you time when dealing with the State on sales tax-related issues*

1. In the **Available Reports:** section, select Financial / Sales Tax Summary:



2. Select the “start” and “end” dates for the report by entering them in the **Date range for payments** field.

3. To sort the report results to a greater degree of specificity, click **Sort...** to open the **Report Sorting Options** window. Select the appropriate criteria and click **OK** to return to the **Print Reports** window (or click **Cancel** to return and discard any changes made to the sort criteria, whether new or modified).

4. Click 

to preview the report on your screen before sending it to the printer.

OR...

5. Click 

to print the report without previewing it.

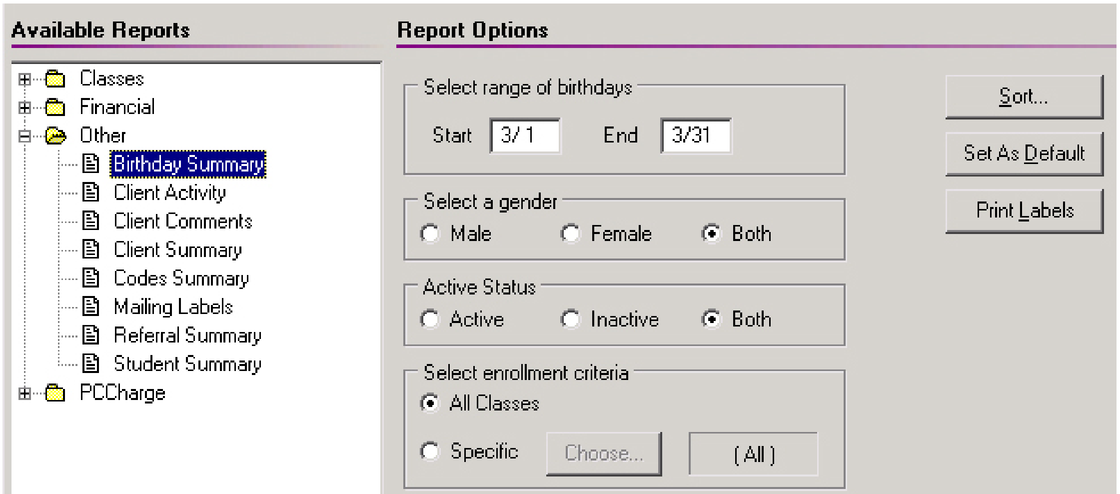
Generating Reports in ProSchool

-continued-

■ OTHER - BIRTHDAY SUMMARY

• *Shows all birthdays, by Client or Student, within a selectable range and based on specific enrollment criteria. Using the "print labels" function, makes it quick and easy to batch monthly birthday card mailings (if your school does that).*

1. In the **Available Reports:** section, select Other / Birthday Summary:



2. Select a range of birthday dates ("Start", "End") you want to include in the report in the **Select range of birthdays** section using the MM / DD format. (ProSchool defaults to the current month.)

3. Indicate the gender of Students to be included in the report by selecting **Male**, **Female** or **Both** in the section, **Select a gender**.

4. In the **Active Status** section, select one of these three:

- **Active** – if you want to include birthday listings only for *active* Students in the report;
- **Inactive** – if you want the report to include birthday listings only for *inactive* Students;
- **Both** (the default) – if you want the report to show birthdays for *all* Students.

5. In the **Select enrollment criteria** section, you can configure enrollment criteria to filter your report's results (if you don't wish to filter report results based on class enrollment criteria, skip to the next step). To select a specific class or subset of classes for use in determining which Students appear on the report, select **Specific**, then select **Choose...** to open the **Search for a Class** window, where you can select a class.

6. To sort the report results to a greater degree of specificity, click **Sort...** to open the **Report Sorting Options** window. Select the appropriate criteria and click **OK** to return to the **Print Reports** window (or click **Cancel** to return and discard any changes made to the sort criteria, whether new or modified).

7. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

8. Click 

to preview the report on your screen before sending it to the printer.

OR...

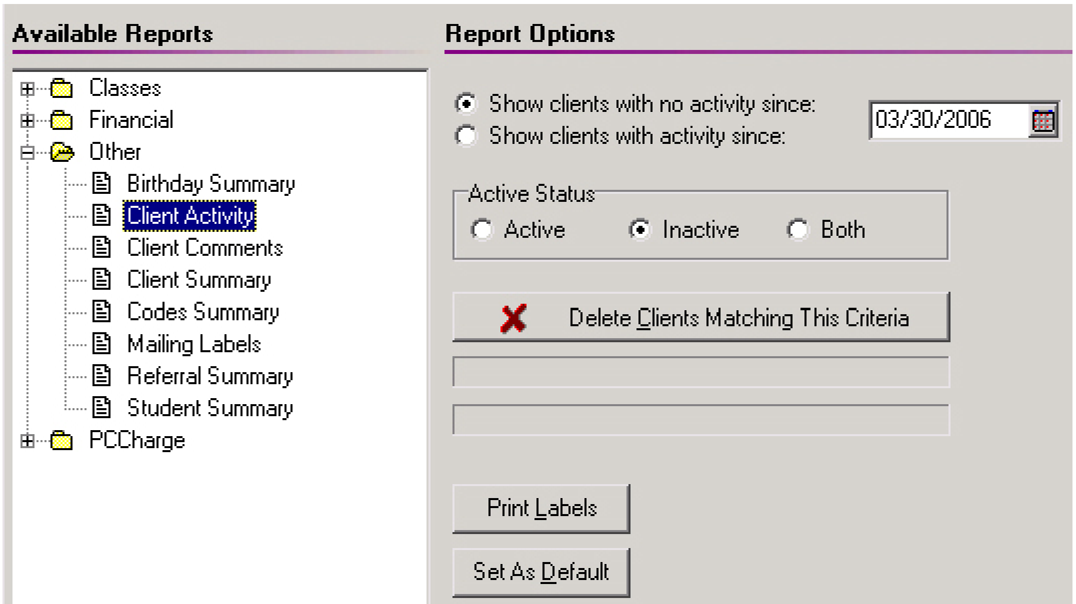
9. Click 

to print the report without previewing it.

Other - Client Activity

• Generates lists of "inactive only" or "active only" Clients since a specified date. This report is a useful database maintenance tool because it allows you to ferret out old records from your school's database for reactivation or deletion. For example, you may wish to phone or mail a follow-up notice to Clients who have not shown any activity on their accounts for the last six months. Or, you may wish to delete Client records for those Clients who have not had any activity on their accounts for the last 12 months.

1. In the **Available Reports:** section, select Other / Client Activity:



2. To include only *inactive* Clients in your report, select **Show clients with no activity since:** and enter a date;

OR...

To include only *active* Clients in your report, select **Show clients with activity since:** and enter a date.

3. In the **Active Status** section, select one of the following:

- **Active** if you want the report to include all Clients who currently have at least one Student enrolled in at least one class);
- **Inactive** if you want the report to include only "inactive" Clients (those who do *not* currently have at least one Student enrolled in at least one class);
- **Both** (the default) if you want the report to show all Clients (whether or not the Client currently has any Students enrolled in any classes).

4. To print labels for all names matching your report criteria, click **Print Labels**. The **Print Labels** window will open, showing you the names which meet the criteria, and giving you the option of using the Student's or parent's (Client) name on the label.

5. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

Generating Reports in ProSchool

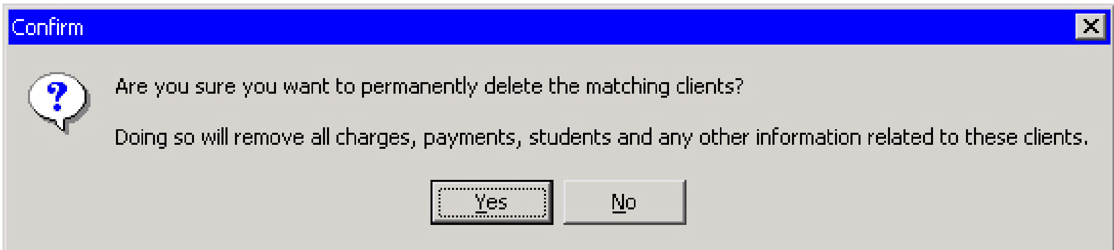
-continued-

6. Click Print Preview to preview the report on your screen before sending it to the printer.

OR...

7. Click Print to print the report without previewing it.

8. To permanently delete from your school's databases all Clients (and their Students) that appear on the report (**be careful**—this could mean active or inactive Students, depending on how you configured your report), click the Delete Clients Matching This Criteria button. A confirm dialog box will appear:



To proceed with the deletions, click **Yes** (or click **No** to cancel the process and return to the Client Activity window).

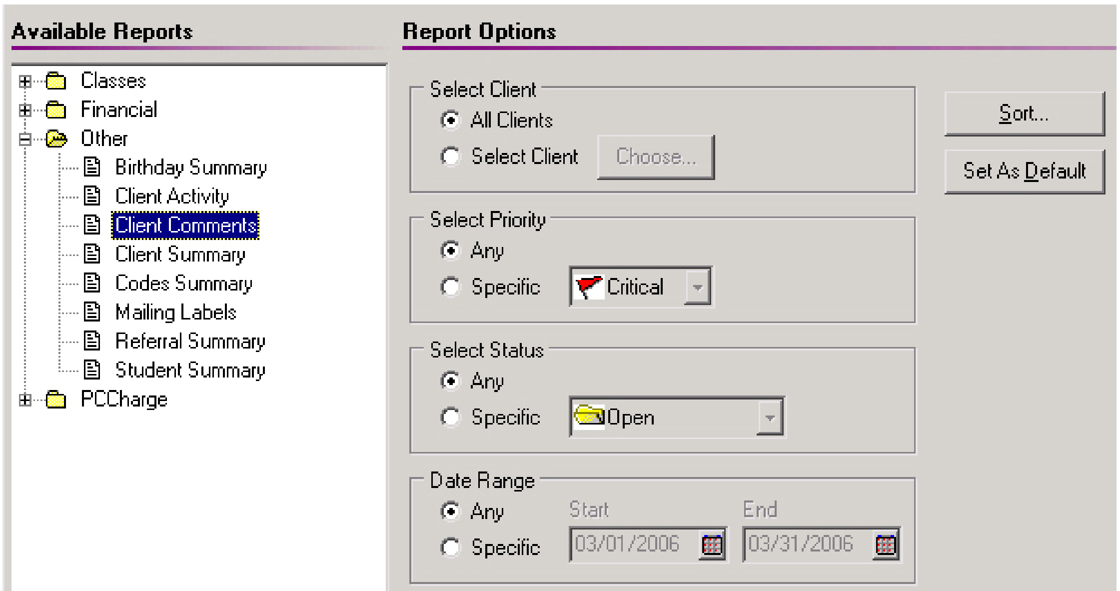
Note: When you select this option, any comments entered for the Client and Student are also deleted.

OTHER - CLIENT COMMENTS

• Generates a report of Client Comments (complete text) either for a specified Client or for all Clients. Results can be filtered by priority and status, and confined to a date range if desired.

1. In the **Available Reports:** section, select Other / Client Comments:

-continued-



2. In the **Select Client** section, select *one* of the following:

- **All Clients** – to print comments for all Clients;
- **Select Client** – opens the **Search for a Client** window where you can specify a single Client.

3. In the **Select Priority** section, select *one* of the following:

- **Any** – to print comments without regard to priority;
- **Specific**, then click on the drop-down menu and choose **Critical**, **High**, **Normal** or **Low**;

4. In the **Select Status** section, select *one* of the following:

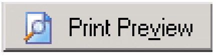
- **Any** – to print all comments without regard to status;
- **Specific**, then click on the drop-down menu and choose **Open**, **Closed**, **Need Follow-up** or **Waiting**;

5. In the **Date Range** section, select **All** if you want the report to include Client comments without regard to date; otherwise, select **Specific** and enter “start” and “end” dates.

6. To sort the report results to a greater degree of specificity, click **Sort...** to open the **Report Sorting Options** window. Select the appropriate criteria and click **OK** to return to the **Print Reports** window (or click **Cancel** to return and discard any changes made to the sort criteria, whether new or modified).

7. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

Generating Reports in ProSchool

8. Click 

to preview the report on your screen before sending it to the printer.

OR...

9. Click 

to print the report without previewing it.
Preview window, or the **Print** button from the **Print Reports** window.

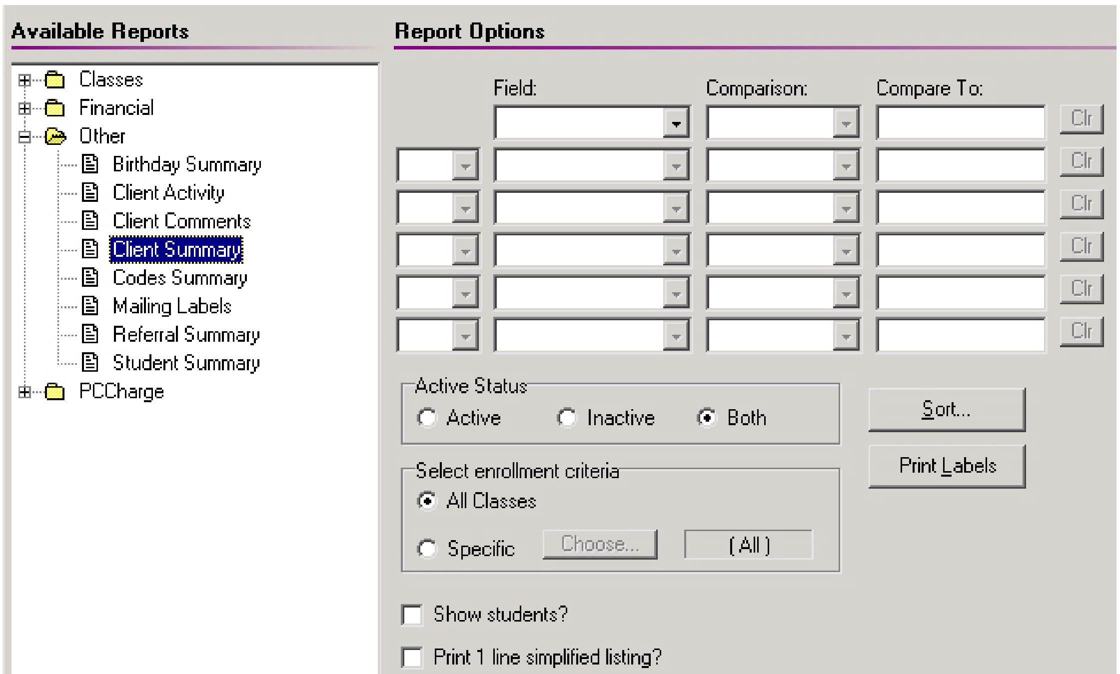
-continued-

OTHER - CLIENT SUMMARY

• Lists Clients that meet specific search criteria. A powerful analytical tool, especially with large databases.

1. In the **Available Reports:** section, select Other / Client Summary:

-continued-



2. To filter the report results to more exacting criteria, select or enter the appropriate filter data in the **Field**, **Comparison** and **Compare To:** data matrix. (The configuration of this matrix is discussed earlier in this section on page 305 in the section entitled, “Using Filter Criteria in ProSchool Reports”.)

3. To sort the report results to a greater degree of specificity, click **Sort...** to open the **Report Sorting Options** window. (The configuration of this window is discussed earlier in this section—see “Using the Sort Utility in ProSchool Reports”.) Select the appropriate criteria and click **OK** to return to the **Print Reports** window (or click **Cancel** to return and discard any changes made to the sort criteria, whether new or modified).

4. In the **Active Status** section, select one of the following:

- **Active** if you want the report to include all Clients who currently have at least one Student enrolled in at least one class);
- **Inactive** if you want the report to include only “inactive” Clients (those who do *not* currently have at least one Student enrolled in at least one class);
- **Both** (the default) if you want the report to show all Clients (whether or not the Client currently has any Students enrolled in any classes).

5. To sort the report results to a greater degree of specificity, click **Sort...** to open the **Report Sorting Options** window. Select the appropriate criteria and click **OK** to return to the **Print Reports** window (or click **Cancel** to return and discard any changes made to the sort criteria, whether new or modified).

Generating Reports in ProSchool

-continued-

6. In the **Select enrollment criteria** section, you can configure enrollment criteria to filter your report's results (if you don't wish to filter report results based on class enrollment criteria, skip to the next step). To select a specific class or subset of classes for use in determining which Clients appear on the report, select **Specific**, then select **Choose...** to open the **Search for a Class** window, where you can select a class.

7. To print labels for all names matching your report criteria, click **Print Labels**. The **Print Labels** window will open, showing you the names which meet the criteria, and giving you the option of using the Student's or parent's (Client) name on the label.

8. Select **Show students?** if you want to include the individual Student names under each Client listing on this report.

9. Select **Print 1 line simplified listing?** if you want to condense the report to fit more Client listings on each page. If you select this option, ProSchool abbreviates each Client listing on the report by eliminating some of the secondary Client information (e-mail address, additional phone numbers, etc.). If your school has an extensive Client database, you may find this option useful.

Hint: To see the difference the above two options make on the appearance and content included in the report, experiment with these options and use the "Print Preview" function. Remember that doing so does not make any changes to your Client or Student database.

10. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

11. Click 

to preview the report on your screen before sending it to the printer.

OR...

12. Click 

to print the report without previewing it.

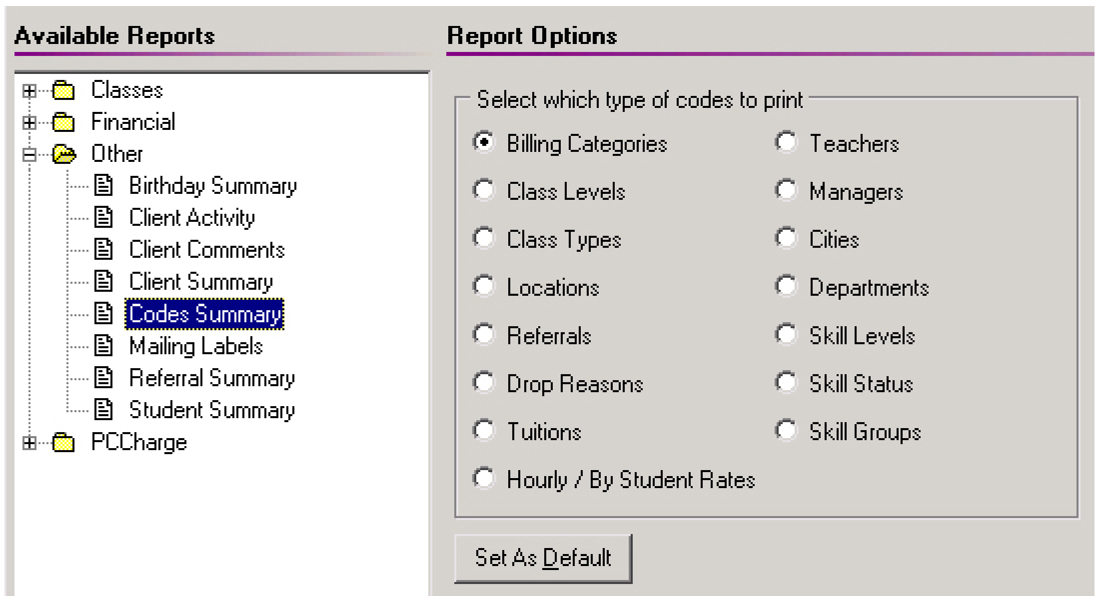
Generating Reports in ProSchool

-continued-

OTHER - CODES SUMMARY

• *Generates a report of all codes you have configured for your school. A useful tool for periodic review of your school's codes.*

1. In the **Available Reports:** section, select Other / Codes Summary:



2. In the **Select which type of codes to print** section, select a type of code.

3. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

4. Click Print Preview to preview the report on your screen before sending it to the printer.

OR...

5. Click Print to print the report without previewing it.

Generating Reports in ProSchool

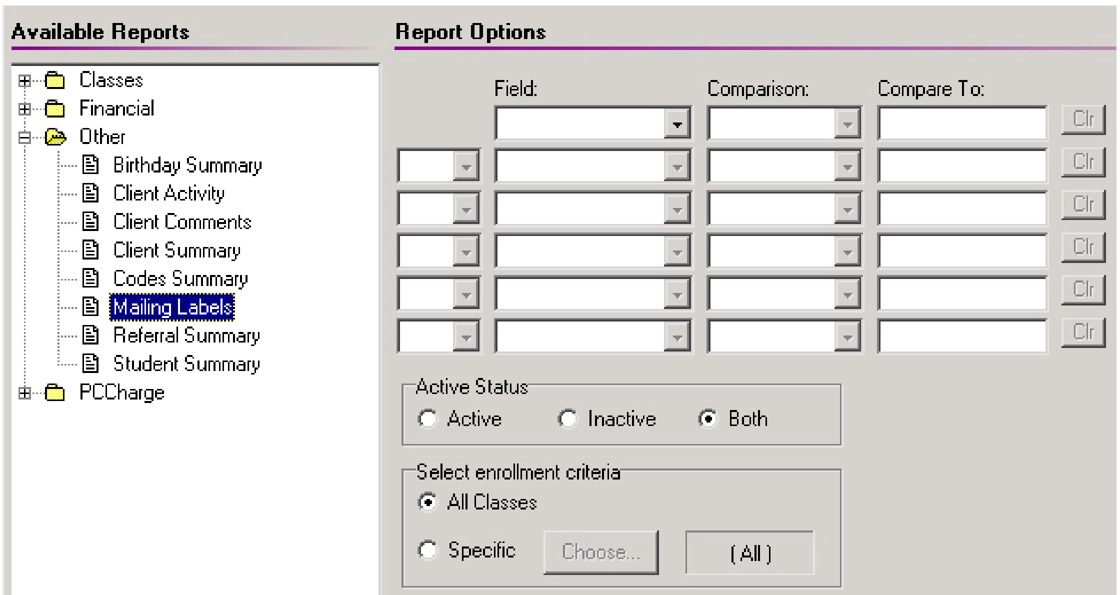
-continued-

OTHER - MAILING LABELS

- *Generates labels of all types using any one of numerous templates.*

Note: This section covers the printing of labels only, not *the design or selection of various label templates. To change, modify or create new label templates, refer to the previouis section entitled, "Creating Labels In ProSchool" on page 83.*

1. In the **Available Reports:** section, select Other / Mailing Labels:



2. To filter the report results to more exacting criteria, select or enter the appropriate filter data in the **Field**, **Comparison** and **Compare To:** data matrix. (The configuration of this matrix is discussed earlier in this section on page 305.)

3. In the **Active Status** section, select one of the following:

   - **Active** if you want the report (mailing labels) to include all Clients who currently have at least one Student enrolled in at least one class);
   - **Inactive** if you want the report (mailing labels) to include only "inactive" Clients (those who do *not* currently have at least one Student enrolled in at least one class);
   - **Both** (the default) if you want the report (mailing labels) to show all Clients (whether or not the Client currently has any Students enrolled in any classes).

4. In the **Select enrollment criteria** section, you can configure enrollment criteria to filter your report's results (if you don't wish to filter report results based on class enrollment criteria, skip to the next step). To select a specific class or subset of classes for use in determining which Clients appear on the report, select **Specific**, then select **Choose...** to open the **Search for a Class** window, where you can select a class.

5. Click 

to preview the report on your screen before sending it to the printer.

OR...

6. Click 

to print the report without previewing it.

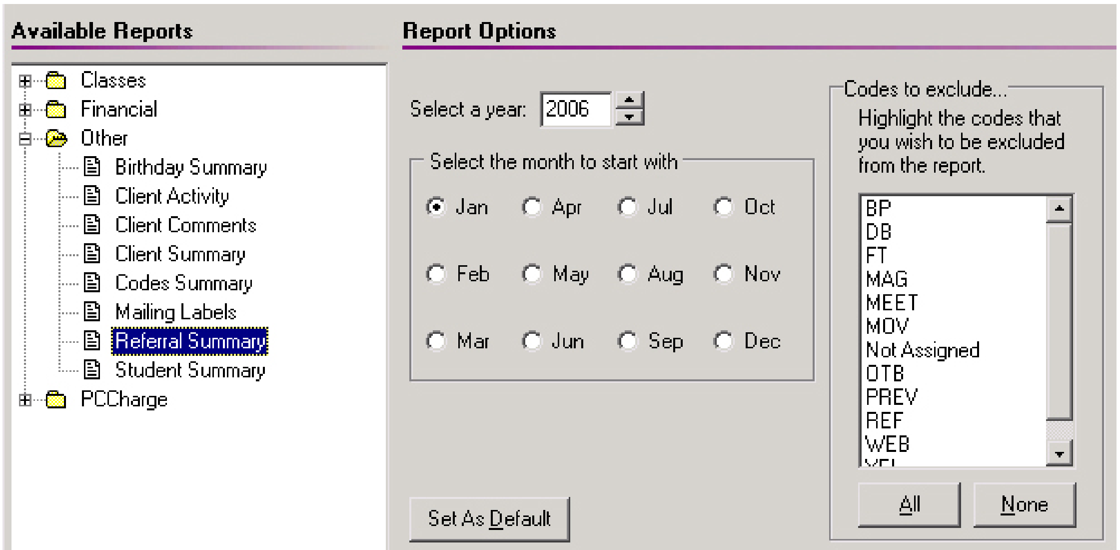
Generating Reports in ProSchool

-continued-

OTHER - REFERRAL SUMMARY

• *Generates a list of referrals occurring within a specified 12-month period, based on specific criteria. This is a useful tool for tracking referrals and cultivating referral sources.*

1. In the **Available Reports:** section, select Other / Referral Summary:



2. Select the year in which the report will start either by entering it manually or using the up- and down-arrow buttons in the **Select a year:** field.

3. Select the month in which you wish to begin your report in the **Select the month to start with** section. (For an entire calendar year of activity, select **Jan**.)

4. To exclude Clients from the report based on specific referral codes, you can select the codes you wish to exclude from the report by selecting them in the **Codes to exclude...** section. For example, to include all Clients on the Referral Summary report *except* those who learned of your school from your ad in the Yellow Pages, select **YELP**. The **All** and **None** buttons can be used to select or unselect all referral codes with a single click. To select a unique subset of codes (some but not all), hold down the **CONTROL** key while clicking on the specific codes you want to exclude from the report.

5. If you have changed the settings for this report and wish to save them as the default report configuration, click **Set As Default** button.

6. Click 

to preview the report on your screen before sending it to the printer.

OR...

7. Click 

to print the report without previewing it.

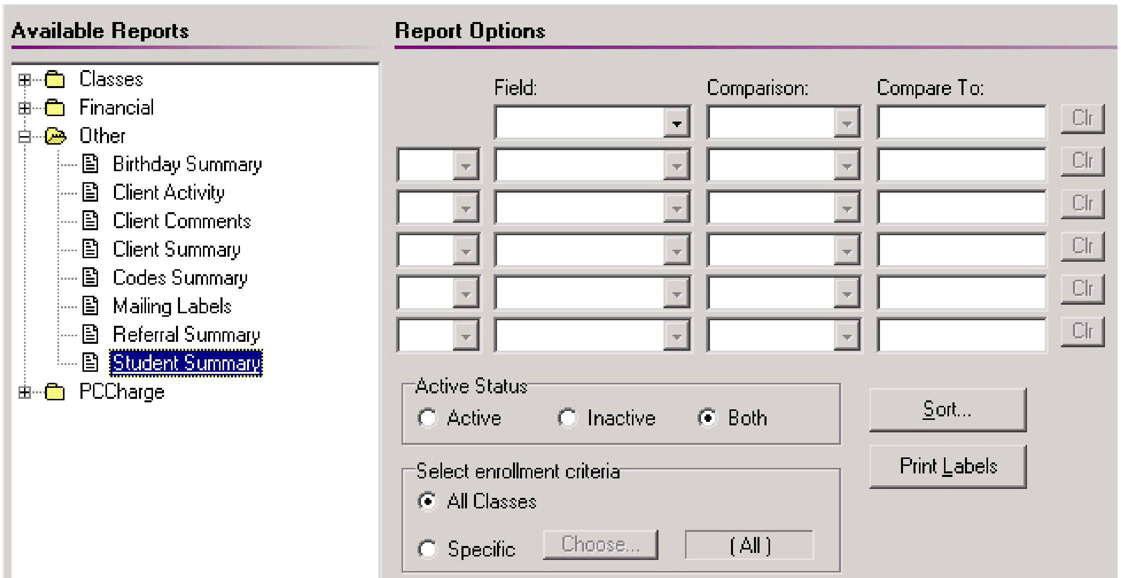
Generating Reports in ProSchool

-continued-

OTHER - STUDENT SUMMARY

• *Generates lists of Students meeting specific criteria.*

1. In the **Available Reports:** section, select Other / Student Summary:



2. To filter the report results to more exacting criteria, select or enter the appropriate filter data in the **Field**, **Comparison** and **Compare To:** data matrix. (The configuration of this matrix is discussed earlier in this section on page 305.)

3. In the **Active Status** section, select one of the following:

- **Active** if you want the report to include all Students who currently are enrolled in at least one class;
- **Inactive** if you want the report to include only “inactive” Students (those who are *not* currently enrolled in at least one class);
- **Both** (the default) if you want the report to show *all* Students (whether or not they are currently enrolled in any classes).

4. To sort the report results to a greater degree of specificity, click **Sort...** to open the **Report Sorting Options** window. Select the appropriate criteria and click **OK** to return to the **Print Reports** window (or click **Cancel** to return and discard any changes made to the sort criteria, whether new or modified).

5. In the **Select enrollment criteria** section, you can configure enrollment criteria to filter your report's results (if you don't wish to filter report results based on class enrollment criteria, skip to the next step). To select a specific class or subset of classes for use in determining which Clients appear on the report, select **Specific**, then select **Choose...** to open the **Search for a Class** window, where you can select a class.

6. To print labels for all names matching your report criteria, click **Print Labels**. The **Print Labels** window will open, showing you the names which meet the criteria, and giving you the option of using the Student's or parent's (Client) name on the label.

Generating Reports in ProSchool

7. Click  to preview the report on your screen before sending it to the printer.

OR...

8. Click  to print the report without previewing it.

-continued-

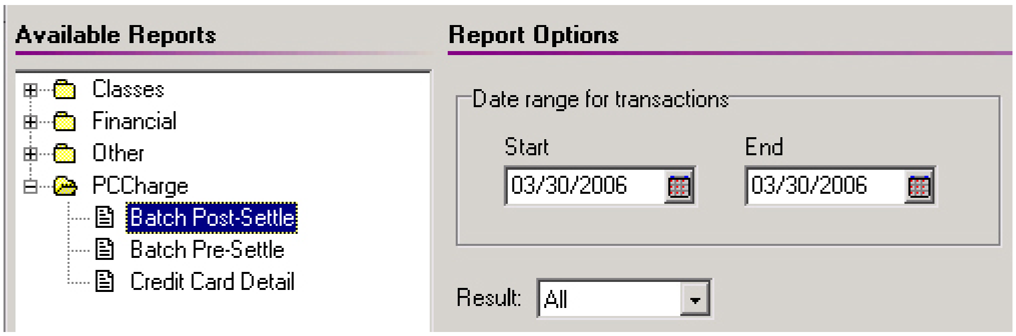
Generating Reports in ProSchool

-continued-

PCCHARGE - BATCH POST-SETTLE

• *Generates a report showing credit card charges (approved, declined or all) within a specified date period* ***after*** *they have been batch-processed by your merchant account services provider.*

1. In the **Available Reports:** section, select PCCharge / Batch Post-Settle:



2. Select the “start” and “end” dates for the report by entering them in the **Date range for transactions** field.

3. Use the **Result:** drop-down menu to select which transactions you want to include on the report:

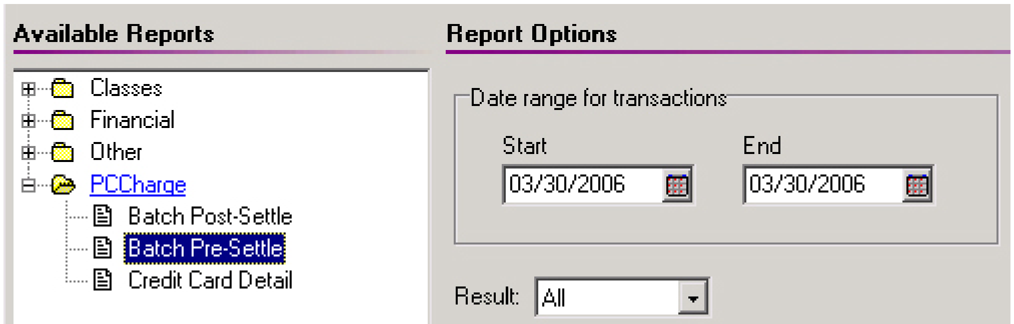
- **All** – every transaction within the specified date range, whether approved or declined;
- **Approved** – only those transactions that were *approved*;
- **Declined** – only those transactions that were *declined.*

4. Click  to print the report.

PCCHARGE - BATCH PRE-SETTLE

• *Generates a report showing credit card charges (approved, declined or all) within a specified date period* ***before*** *they have been batch-processed by your merchant account services provider.*

1. In the **Available Reports:** section, select PCCharge / Batch Pre-Settle:



2. Select the “start” and “end” dates for the report by entering them in the **Date range for transactions** field.

3. Use the **Result:** drop-down menu to select which transactions you want to include on the report:

- **All** – every transaction within the specified date range, whether approved or declined;
- **Approved** – only those transactions that were *approved*;
- **Declined** – only those transactions that were *declined*.

4. Click 

to print the report.

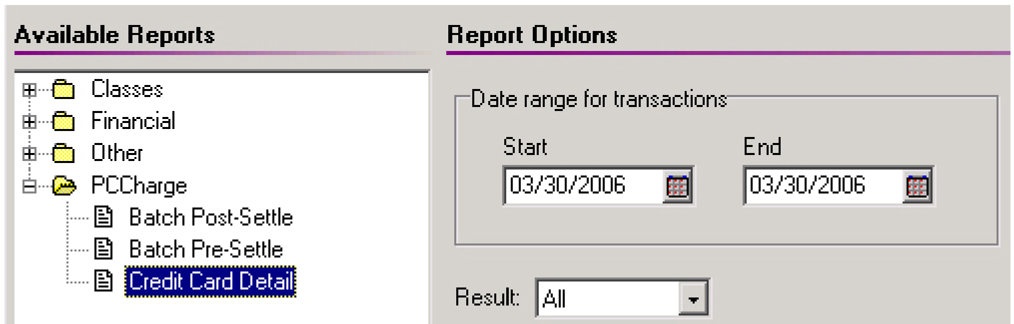
Generating Reports in ProSchool

-continued-

PCCHARGE - CREDIT CARD DETAIL

• *Generates a report showing credit card charges (approved, declined or all) within a specified date period.*

1. In the **Available Reports:** section, select PCCharge / Credit Card Detail:



2. Select the "start" and "end" dates for the report by entering them in the **Date range for transactions** field.

3. Use the **Result:** drop-down menu to select which transactions you want to include on the report:

- **All** – every transaction within the specified date range, whether approved or declined;
- **Approved** – only those transactions that were *approved*;
- **Declined** – only those transactions that were *declined*.

4. Click  to print the report.

Backing Up and Restoring Your ProSchool Databases

BACKING UP AND RESTORING DATA

ProSchool's Backup / Restore function allows you to ensure the stability of your school's administrative operations by backing up your ProSchool databases. This should be done on a regular basis, and ideally should be done after any session at the computer involving data entry or processing. The importance of backing up your data cannot be stressed enough!

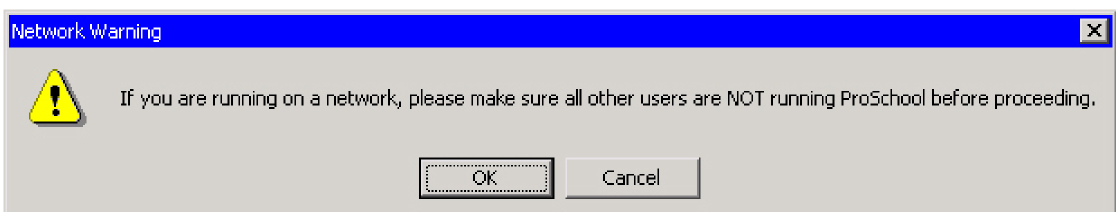
ProSchool databases can be backed up to 3-1 / 2" mini-floppy diskettes, CDs or DVDs, a Zip® drive, USB "Flash" drives, a second hard drive or other media (just don't back up your databases to the same hard drive you're running ProSchool from!). If you backup to 3-1 / 2" floppies you may need more than one (ProSchool compresses the data and seamlessly backs up to multiple floppies in sequence).

Note: ProSchool cannot back up directly to CDs or DVDs. You must first back up your ProSchool files to your hard drive, then use your computer's CD / DVD burning software to write your ProSchool backup files to CD or DVD.

! Losing your data in the event of a computer crash or hard disk failure can be absolutely <u>disastrous</u>! Do not be lulled into a false sense of security by the fact that "things are running smoothly—the computer's very dependable". When you least expect it, a crash or failure could occur and you will have to spend hours—if not days—rebuilding your school's records. We repeat: BACKUP ON A REGULAR BASIS!

To backup ProSchool databases using the Backup/Restore utility:

1. Click on the **Utilities** pull-down menu (at the top of the ProSchool window) and select **Backup/Restore...**; the following warning appears:

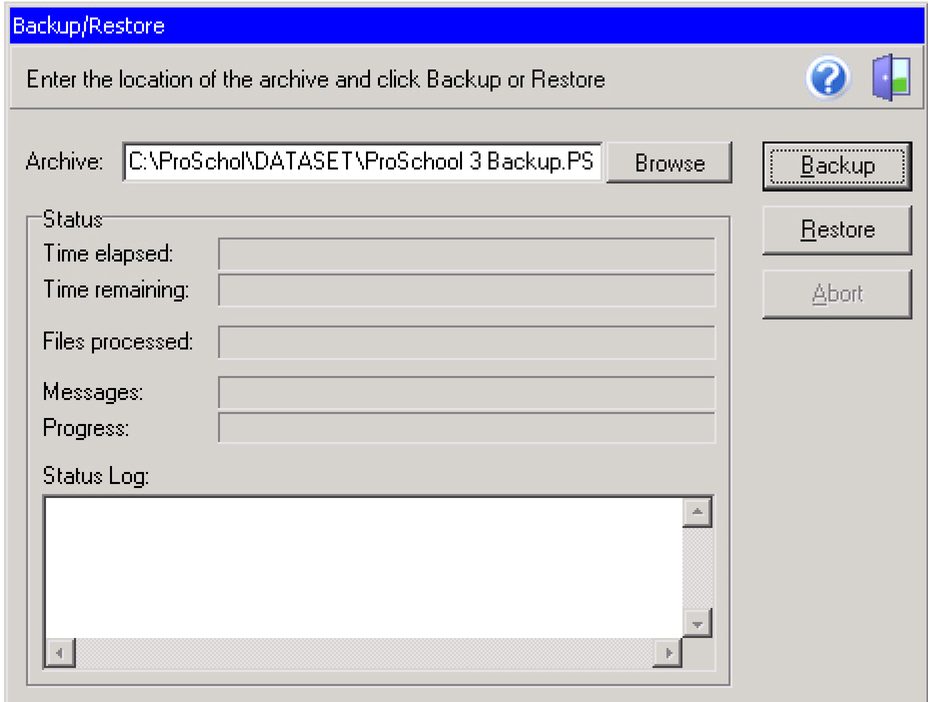


Click **OK** to proceed (or **Cancel** to cancel the backup).

Backing Up and Restoring Your ProSchool Databases

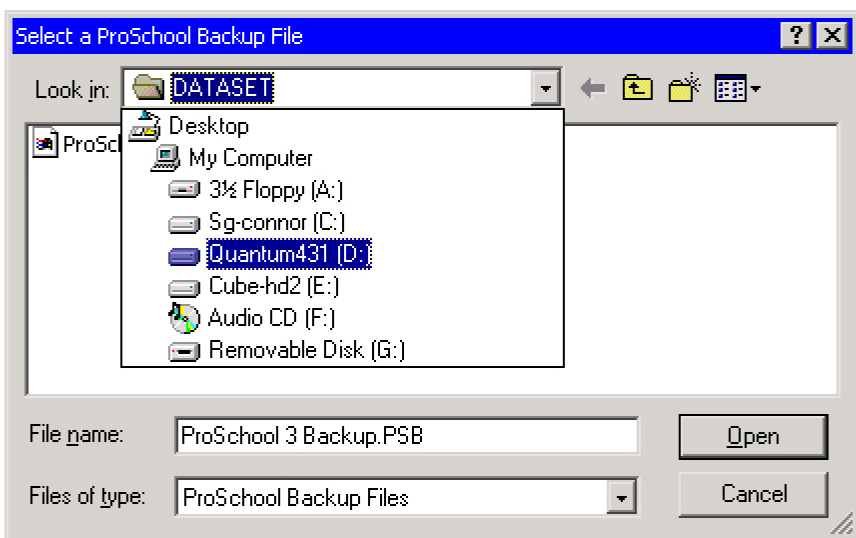
-continued-

The **Backup/Restore** window opens:



2. To backup existing databases, first enter the location and name of the backup file in the **Archive:** field (for floppies, the directory is usually "a:\...”). ProSchool automatically names the backup file "backup.psb".

Or, you can click the **Browse** button to open the **Select a ProSchool Backup File** window:



3. If you are using floppies, insert a blank, formatted floppy in your designated floppy drive.

Backing Up and Restoring Your ProSchool Databases

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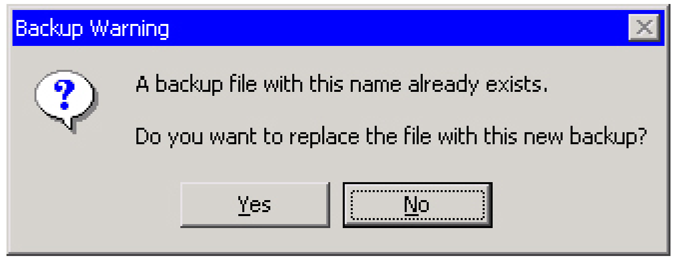
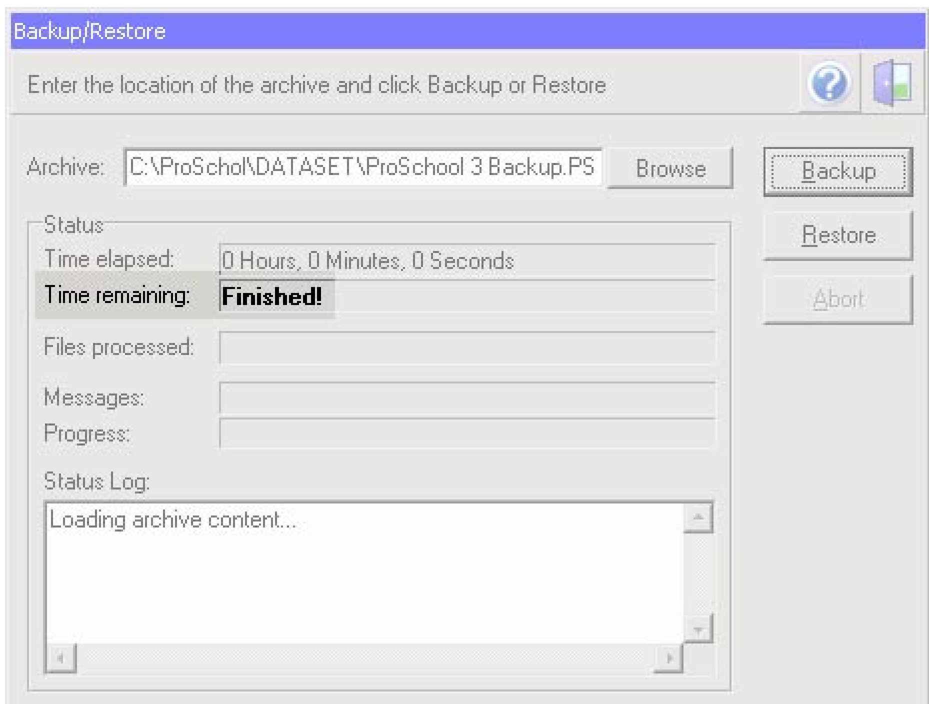
4. Click **Backup**. If there is an existing ProSchool backup file in the target location, ProSchool confirms your intentions:



Click **Yes** to overwrite the existing backup. Your existing backup file will be updated (overwritten) with the current backup file. (If you click **No**, you are returned to the **Backup/ Restore** window.) The progress of your restore is shown by the progress bar, then ProSchool confirms that the backup is completed:

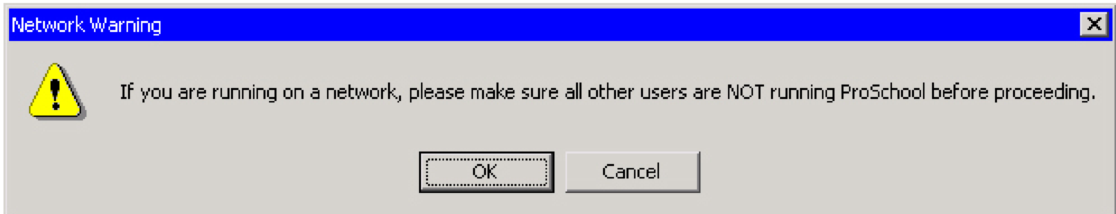


Backing Up and Restoring Your ProSchool Databases

-continued-

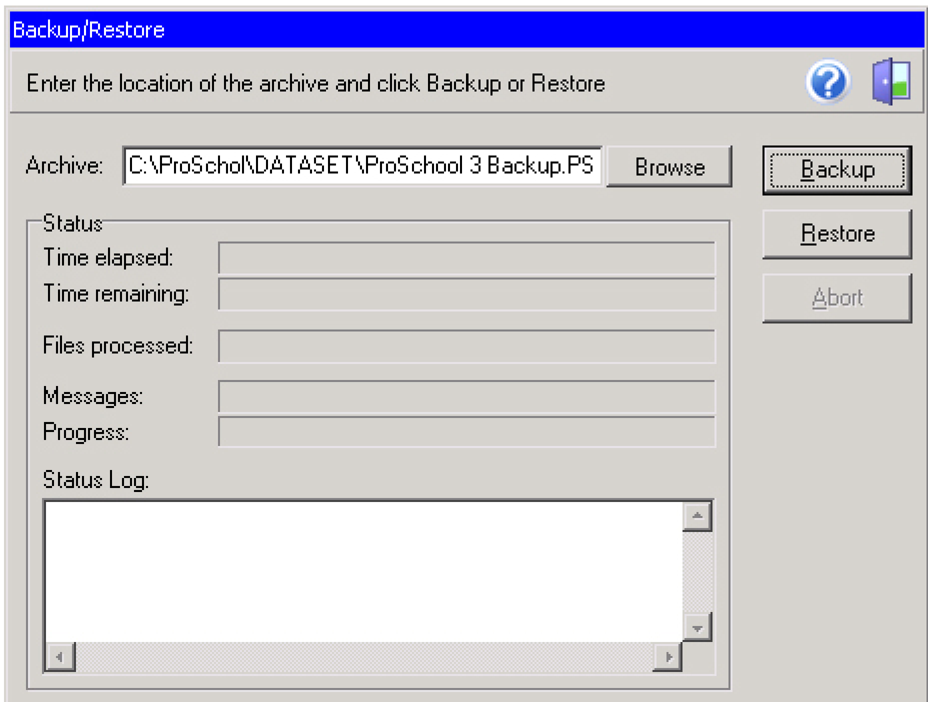
To restore ProSchool databases using the Backup/Restore utility:

1. Click on the **Utilities** pull-down menu (at the top of the ProSchool window) and select **Backup/Restore...**; the following warning appears:



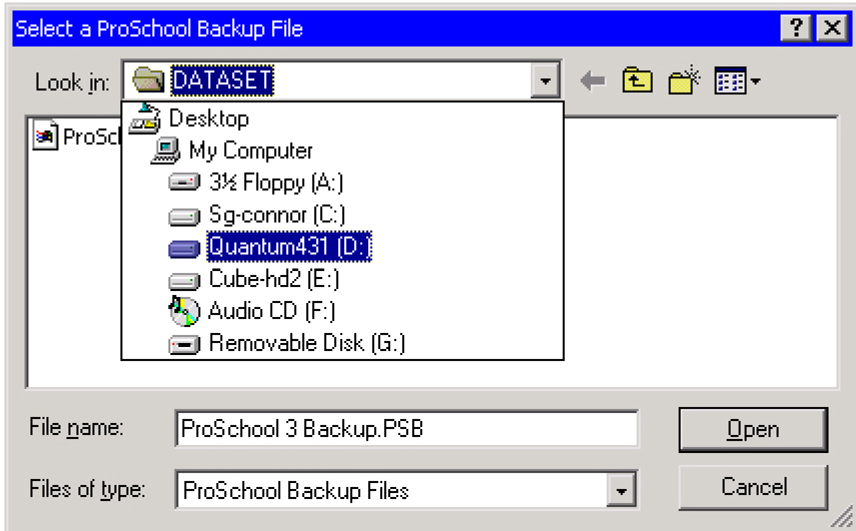
Click **OK** to proceed (or **Cancel** to cancel the backup).

The **Backup/Restore** window opens:

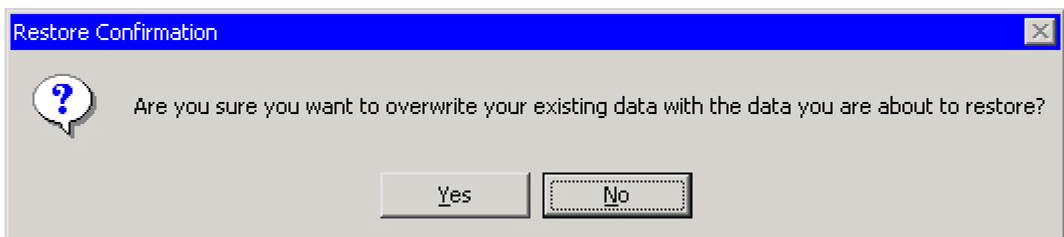


2. To restore a previous backup, first enter the location and name of the backup file in the **Archive:** field (for floppies, the directory is usually "a:\..."). Note that the name and location of the most recent backup will appear in the **Archive:** field.

If you want to back up a different backup file than the one shown, click the **Browse** button to open the **Select a ProSchool Backup File** window:



3. From the **Backup/Restore** window, click **Restore**. ProSchool confirms your intentions:



Click **Yes** to continue with the restore process (or **No** to return to the main **Backup/Restore** window).

Backing Up and Restoring Your ProSchool Databases

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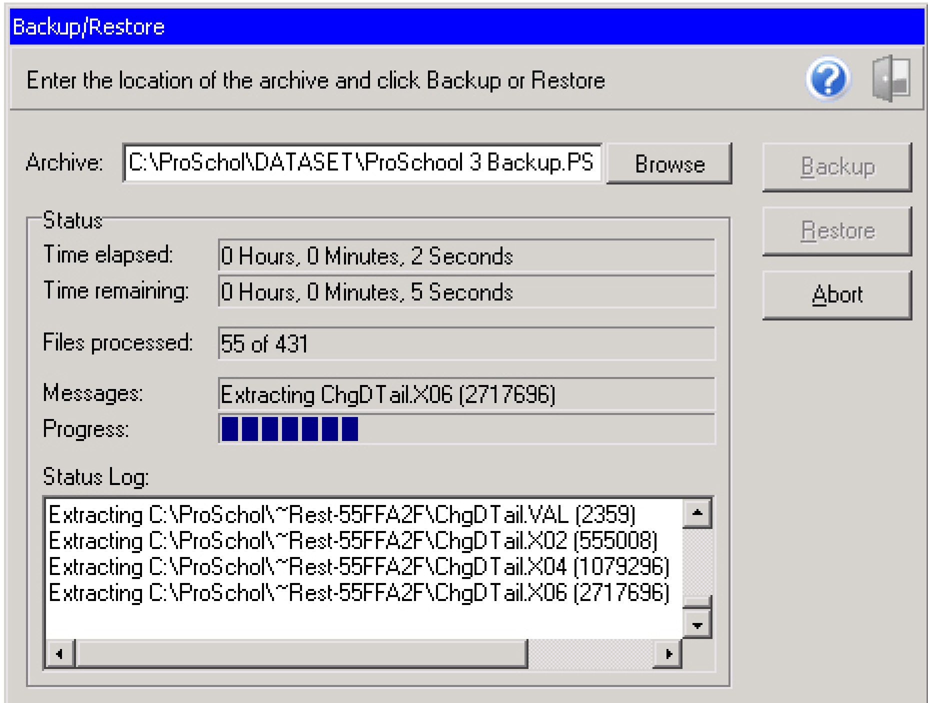
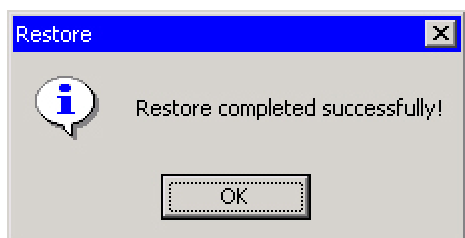
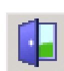
The **Status** section of the window will display the progress being made (just as it did in the illustration in the "Backup" procedure above):



When the restore is complete, the following confirmation appears:



2. Click **OK**, then  to close the **Backup/Restore** window.

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