

ClassManager™

Demo Manual



©2000 Atlantic Associates All Rights Reserved.

ClassManager™

©2000, Atlantic Associates
All rights reserved:

SOFTWARE LICENSE AGREEMENT

Atlantic Associates grants you a non-exclusive license to use this copy of the program and accompanying materials according to the following terms:

You may:

- a) use this program on only one computer at a time.
- b) make one (1) copy of the program in machine readable form solely for backup purposes, provided that you reproduce all proprietary notices on the copy.
- c) physically transfer the program from one computer to another, provided that the program is used on only one computer at a time; and
- d) transfer the program onto a hard disk only for use as described above provided that you can immediately prove ownership of the original diskettes.

You may not:

- a) use the program in a network unless you pay for a separate license for each terminal or workstation from which the program will be accessed;
- b) modify, translate, reverse engineer, decompile, disassemble, create derivative works based on, or copy (except for the backup copy) the program or accompanying materials;
- c) rent, transfer or grant any rights in the program in any form or accompanying materials to any person or corporation without the prior written consent of Atlantic Associates which, if given, is subject to the conferee's consent to the terms and conditions of this license; or
- d) remove any proprietary notices, labels or marks on the program and accompanying materials.

This license is not a sale. Title and copyrights to the program, accompanying materials and any copy made by you remain with Atlantic Associates.

TERMINATION

Unauthorized copying of the program or the accompanying materials, or failure to comply with the above restrictions will result in automatic termination of this license and will make available to Atlantic Associates other legal remedies. Upon termination you will destroy or return to Atlantic Associates the program, accompanying materials and any copies.

LIMITED WAR- RANTY AND DISCLAIMER

THE PROGRAM ACCOMPANYING MATERIALS ARE PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

Atlantic Associates does not warrant that the functions contained in the program will meet your requirements or that the operation will be uninterrupted or error free. The entire risk as to the use, quality, and performance of the program is with you. Should the program prove defective, you, and not Atlantic Associates, assume the entire cost of any necessary repair.

Table of Contents

Preface

Table of Contents

About ClassManager™	6
ClassManager™ Organization	7
About Atlantic Associates	8
Technical Support	8
E-Mail Addresses	8
A Word About This Demo.....	8

Chapter 1

Installing The Demo

OS System Configurations.....	10
Memory Required	10
Monitor Settings	10
What Is In The Package	10
Installation.....	11
On-Screen Help.....	11

Chapter 2

Quick Tour

Accessing ClassManager™	14
Logging In.....	14
Table Selection Palette	14
Moving Between Tables.....	15
Viewing Accounts	15
Adding Students.....	16
Adding Registrations	17
Prorating Class Fees.....	18
Charging Registration Fees.....	18
Transferring Registrations	19
Trial Classes/Waiting Lists	20
Charging For Products	21
Adding Instructors	22
Statements	23
Payments	25
Accounts Receivable.....	26
Quick Find	27
Query Editor.....	28
Printing.....	29
Quick Sort	30

Sort Editor	31
Charting.....	32
Reports	33

Chapter 3

Additional Features

Administrator Tasks	36
Automatic Zip Code Lookup	36
Label Editor	36
SuperReport Editor	36
Choice List	38
Global Updates.....	39
System Setup.....	40
Email.....	42
Spell Checking	42
Quick Report Editor.....	43
Word Processor	44
Calendar	45
Importing Data	46
Spreadsheet	46
Duplicate Checking.....	47
Example Reports.....	48

Chapter 4

Creating A New Data File

Creating A New Data File	51
Initial Setup.....	52
Notes	54

Price List

Pricing.....	56
--------------	----



Preface

About ClassMan-

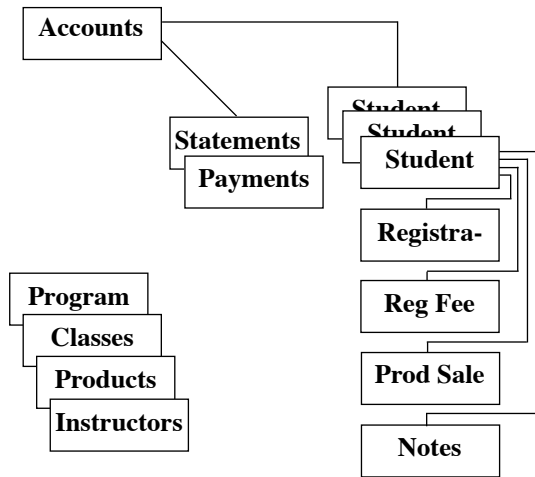
ClassManager™ is a full featured class management system designed to perform the core business functions necessary to run a successful class based organization. Data, within Class-Manager™, is maintained in thirteen main data tables:

1. **Account** - account or individual information including address 1, address 2, city, state, zip, phone numbers, referral source, previous enrolled, status, interest, balance due, related notes, created and modified dates, etc.
2. **Student** - information about the student registrant, i.e., Name, age, reg fee expiration date, program interest, school, student notes recorded at the time of registration, etc.
3. **Instructor** - names and specific addresses of instructors. Used by the application in setting up classes as well as preparing calendars of all upcoming classes.
5. **Program** - this table is used to store information regarding the different programs that are established at a school.
6. **Class** - all relevant information about classes, practices, i.e., dates, times, meeting days, class level, room assignment, designated instructor, fee, drop out date, drop reason, etc.
7. **Registration** - the actual record detailing entry of a student into an activity such as a class, team, etc.
8. **Users** - information detailing the actual users of Class-Manager including special user read/write privileges, group access, passwords, etc.
9. **Payment** - used to store information on payments by inv#, check and pay date, check#, account#, amount, etc.
10. **Product** - used to store information on items that are sold by the school.
11. **Product Sale** - the table that maintains information on all products that are sold by the school and is linked to the account table.
12. **Reg Fee** - records information on all students who have paid or are due to pay their annual fees. Used also by the account table for collecting annual registration fees.
13. **Set Up** - this table establishes the unique business rules that a school will use such as late payment fees, reg fee discounts for multiple students, no class days, etc.

ClassManager™ Organization:

ClassManager™ is organized on a two tier model. This two tier relationship is that of Account - Student. This means that an account such as the Williams family would have one account record in ClassManager™ and possibly multiple student records. Attached to each of these accounts will be students who will attend events offered by the Boston Gymnastics Academy. Through organizing and presenting the data in ClassManager™ this way it is easy to see the relationships between accounts and students and thus be able to more efficiently manage those accounts and students as they participate in the activities of Boston Gymnastics. The organization of ClassManager™ is presented graphically below (Figure P.1).

Two Tier Model



**About
Atlantic
Associates**

Atlantic Associates is a custom software development firm specializing in the small business office automation market. Atlantic Associates was established in 1989.

Atlantic Associates is a registered Microsoft, Apple and 4th Dimension™ software development firm.

**Technical
Support**

Technical support is available free for 30 days after the registration of ClassManager™. Technical support hours are from 8:30 A.M. - 6:00 P.M. Monday-Friday, (Eastern Standard Time) Voice (978) 443-0560 Fax (978) 443-1664.

Support is also available through the Internet.

**E-Mail
Address**

Internet Addresses: Info@atlantic-associates.com

**A Word
About This
Demo**

The demo data file comes with twelve accounts, twenty students, eight instructors, twelve classes, nineteen registrations, twelve statements and six payments. The demo data™ file is supplied so that you may experiment with ClassManager™ without entering data. It is important to note that any data created with this demo is limited to a maximum of twenty Account records.

The purpose of this demo is to give you an overview of the capabilities of ClassManager™. It does not cover all features. Please explore other areas of the program that are not covered.



Chapter 1

Installing The Demo

OS System Configurations

Class Manager™ will run on computers configured with the Windows 98, 2000 and XP operating systems with a minimum of a Pentium III processor. ClassManager™ also runs on all Macintosh OS computers with a minimum of a PowerPC processor.

Memory Required

Both PC and Macintosh computers should have a minimum of 256 Megabytes of Random Access Memory (RAM). ClassManager™ is preconfigured to utilize 64 Megabytes of RAM.

Note: Allocating more memory to ClassManager™ will enhance program performance.

Monitor Settings

Users with Monitors Preference set to Millions/Thousands of colors are advised to change the Control Panel Monitor Preference setting to 256 colors, otherwise they must allocate additional memory to ClassManager™.

Please set your monitor on the PC to 800 by 600 pixels by going to **Start > Settings > Control Panel > Display > Settings**. On the Mac select **Control Panels > Monitors & Sound** and do the same. This will allow ClassManager™ display its Table Selection Palette to the right of the windows that will appear when you select different tables.

What is in the Package

ClassManager™ comes on one CD or can be downloaded from our web site at www.atlantic-associates.com: The ClassManager™ package contains:

1. Demo Manual Version 5.0
2. Program
3. Program Datasheet

To install ClassManager™

Installation


1. Start your computer.
2. Download the ClassManager demo application.
3. On the PC, double-click on the **SetupCM.exe** icon. Follow instructions as they appear.
4. On the Macintosh, double click on the CD disk icon and then double-click on the **ClassManager™** icon. Follow instructions as they appear.

5. This manual is for use by both Windows and Macintosh users. The illustrated screens are identical throughout the application for both the PC and the Mac with the exception that the Mac has a close box at the top left part of an open window whereas Windows has its close box at the top right. Other than these two differences everything else is the same in terms of how you operate ClassManager™.

On-Screen Help

1. In addition to this Demo Manual there is an on-screen help system built into the program.

Help

2. Clicking the  button that appears on the Print, Find, Sort, Import, Export, Table Selection, Preferences, etc. dialogs will automatically launch Adobe Acrobat and will display a pdf version of the ClassManager User Manual.



Chapter 2

Quick Tour

Accessing ClassMan-

To start ClassManager™:

1. Double-click the **ClassManager 5.0** shortcut on the desktop of the PC. On the Mac, double-click the **CM 5.0comp** icon. This loads the program and sample data. The first object that will appear is a Password dialog screen as depicted below (Figure 2.1).

Log-In Dia- log

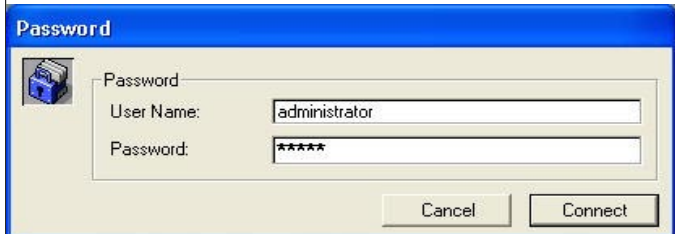


Figure 2.1

1. Enter **administrator** in the User Name field.
2. Enter **admin** in the Password field and click **Connect**.
3. ClassManager™ will then display the Table Selection Palette (Figure 2.2).
4. Click once on any of the tables on the palette and a **List View** of the selected table will be displayed.

Table Selec- tion Palette

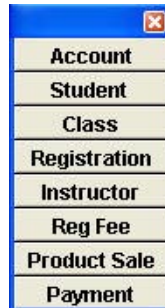


Figure 2.2

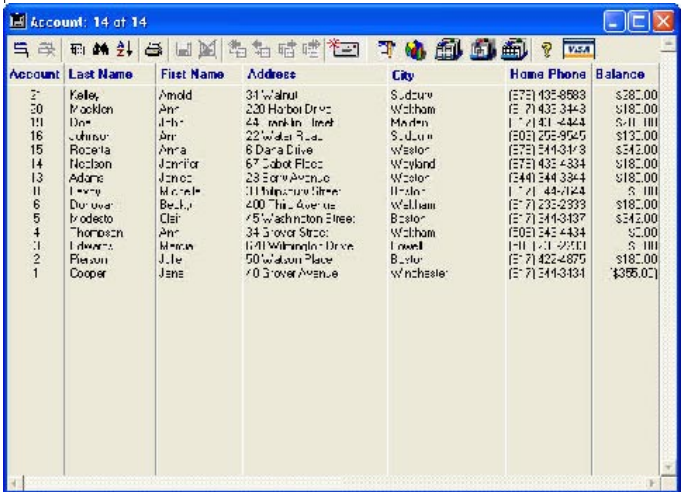
Moving Between Tables:

ClassManager™ offers several ways to move between tables and view data, i.e., clicking on the palette, using **File > Open Table** on the menu bar, and **double-clicking** on subform windows. Below you will find an example of one way to move to each of the tables and view all the records in each table in either list or form view. Begin at the palette of ClassManager™.

Moving Between Files

To View a List of All Accounts:

1. Click on **Account** on the palette.
2. You should now be viewing the **List View** of all the Accounts in the demo file. The Window title should have changed to "Account: 12 of 12". (Figure 2.3)



Account	Last Name	First Name	Address	City	Home Phone	Balance
2	Kelley	Amold	31 Walnut	Sudbury	(781) 432-8983	\$282.00
30	Brookton	Ann	230 Harbor Drive	Waltham	(617) 432-3443	\$182.00
111	Doe	John	24 Franklin Street	Malden	(617) 431-4444	\$111.1111
16	Johnson	Ann	22 Walnut Road	Sudbury	(508) 255-9555	\$132.00
15	Roceta	Anna	8 Dana Drive	Woburn	(781) 544-3434	\$342.00
14	Heddon	Jonathan	87 Cabot Place	Weyland	(781) 432-4334	\$182.00
13	Adams	Jane	23 Grove Avenue	Woburn	(344) 544-3344	\$182.00
11	Lee	Michael	11 Main Street	Woburn	(617) 44-1244	\$111.11
6	Dunover	Becky	400 The Avenue	Waltham	(617) 232-2333	\$182.00
5	Prodetto	Clair	75 Washington Street	Boston	(617) 544-3437	\$342.00
4	Thompson	Ann	34 Grove Street	Waltham	(603) 544-4434	\$2.00
1	Edwards	Marian	141 Wilmington Drive	Lowell	(603) 454-5555	\$111.11
2	Fleming	Julie	50 Wilson Place	Boston	(617) 422-4875	\$182.00
1	Cooper	Jane	70 Grove Avenue	Wichester	(617) 544-3434	\$385.00

Figure 2.3

To View an Individual Account Record:

1. **Double-click** on the first Account record.

2. The selected account will now be displayed in the **Account Form View** of the record (Figure 2.4).

The screenshot shows a software window titled "Account: Record 2 of 14". The form contains the following fields:

- First Name: Ann
- Last Name: Macklen
- Address: 522 Halber Drive
- City: Colliathir
- State: NY
- Zip: 02134
- Work Phone: (617) 434 4432
- Home Phone: (617) 433 3442
- Mobile Phone: (608) 433 4432
- Email: AMacklen@nabou.com
- Card First Name: Paul
- Card Last Name: Macklen

Below the form is a "Notes" section with a list of messages:

- 2/18/02 2:45 PM: Sandra - Call from ANN asking if Nancy can get into the Beginning Gymnastics class scheduled to begin on 8/23/02
- 8/25/02 4:52 PM: Janet - Talked to Ann and agreed to put Nancy in the Girls E 8 Program

Below the notes are several form fields:

- Favored By: Word of Mouth
- Liberty Waiver: Yes (selected) / No
- Play Flag: N
- Energy Plan: [blank]
- Status: Prospect
- Interest: Class
- Balance: \$180.00
- Current: [blank]
- Created: 5/9/2002
- Modified: 6/18/2002
- Current 1: [blank]
- Current 2: [blank]

At the bottom is a table with the following data:

First Name	Last Name	DOB	Age	Sex	Student ID	Expires
Nancy	Macklen	03/23/90	12.3	F	25	5/3/2005

Figure 2.4

To Add a Student Record:

Adding New Students

1. If still in the above account record, click once in the Students subform window and then double-click on **First Name** in the subform window. This will move you from the Account Table to the Student Table and allow you to enter a new student in the Student Form View.
2. This screen can be repeated for adding additional students to the same account. Double-clicking on First Name from the Account form view produces a blank Student form that can be used to enter data about a new student.

The Student form view (Figure 2.5) consists of three sections:

- a. General Student Information
- b. Student Notes
- c. Registration and Product Sales subform windows

Exercise

Exercise:

1. Enter a new Account Name, Address, City, State, Zip, Phone Numbers, etc. by clicking **New** from the Account List

4. Double-click on an class from the list displayed at the bottom of the screen and observe how the selected class information auto-fills the student registration record.

Note: The Re-Register check box is used at the end of each billing cycle to determine if the student should be automatically registered in the next upcoming period. This feature allow for the one-button reregistering of all students by using the **Tools > Special Functions > Roll Over Sessions** feature.

5. If the student is being registered after classes have started click the **Prorate** button and the class fee will be recalculated.

6. After clicking the **Save** button, the system will check if the student has an active reg fee record. If not, it will present a dialog box (Figure 2.7) that will ask if a reg fee should be charged.

Prorating Class Fees

Charging Membership Fees

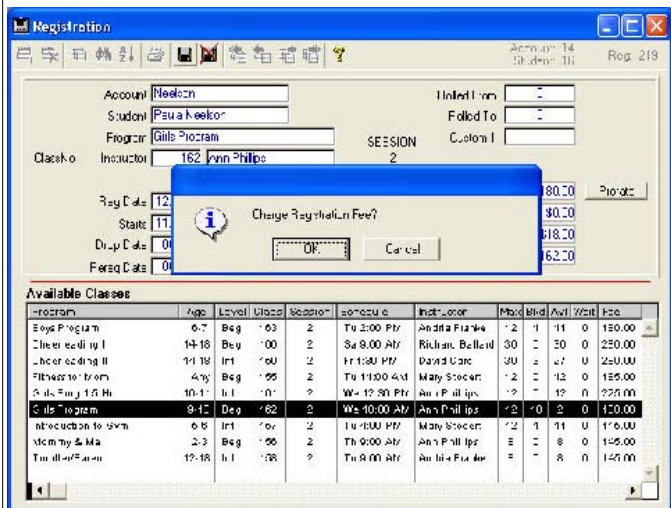


Figure 2.7

7. If a reg fee is to be charged it will appear on the statement along with the fee for the selected class and the product charges for any products that have been purchased.

8. You have now created an Account and Student record, registered a student and charged the annual reg fee. Later, you will sell a product to a student.

Moving Students

Transferring Students:

1. A common requirement in any school is to move students who have already been registered in a class to another class. ClassManager performs this complex process very easily. To move a student, double-click on an existing registration record as it appears in a registration subform window on a student form view. This will cause the registration record to be displayed (Figure 2.8). Next click on the **Transfer** button on the top of the window (Figure 2.9)

Figure 2.8

The screenshot shows the 'Registration' window for student Denise Modereu. The window title is 'Registration' and it shows 'Account: h' and 'Student: Denise Modereu'. The registration details are as follows:

Account	Modereu	Roll'd From	198
Student	Denise Modereu	Roll'd To	0
Program	3rd Program	Custom 1	
Class No.	162	SESSION	2
Reg Date	11/11/02	Age	9-10
Units	11.7110	Sex	Hex
Drop Date	11/11/02	Inst	Registration
Div. Resour		Register	<input checked="" type="checkbox"/>
Fee	5111.111	Total	5111.111

Below the form is a table showing attendance records:

Attendance	Meeting Date	Present
100	Wed, Nov 13, 2002	<input checked="" type="checkbox"/>
115	Wed, Nov 20, 2002	<input checked="" type="checkbox"/>
110	Wed, Nov 27, 2002	<input checked="" type="checkbox"/>
157	Wed, Dec 04, 2002	<input checked="" type="checkbox"/>
198	Wed, Dec 11, 2002	<input checked="" type="checkbox"/>
198	Wed, Dec 18, 2002	<input checked="" type="checkbox"/>

Figure 2.9

The screenshot shows the 'Registration' window for student Denise Modereu. The window title is 'Registration' and it shows 'Account: 1' and 'Student: D'. The registration details are as follows:

Account	Couper	Roll'd From	-
Student	Denise Couper	Roll'd To	218
Program	Buy P. 198 II	Custom	False

Below the form is a table showing a list of available classes:

Program	Age	Level	Class No.	Session	Month	Days	Abbrev	Schedule	Instructor
Cheerleading I	14-10	Reg	19C	2				Ca 9:00 AM	Richard Dalbec
Cheerleading I	14-10	Inc	19E	2				Tr 1:00 PM	Carol Card
Chess for Men	Any	Exp	19E	2				Tu 11:00 AM	Mary Joceit
CHE Prep Lab I	10-11	Inc	191	2				We 12:30 PM Tr 12:00 PM	Ann Phillips
CHE Program	9-10	Exp	19C	2				We 10:00 AM	Ann Phillips
Introduction to Oym	5-8	Inc	197	2				Tu 4:00 PM	Mary Joceit
Memory Skills	2-3	Exp	19E	2				Th 5:00 AM	Ann Phillips
Toddler/Tenac	12-10	Inc	19C	2				Tu 5:00 AM	Ardis Frankel

2. A new display will appear over the registration record which will allow you to select the class that the student will be transferred to. Double-click on the desired class and then click **OK**. This will cause the previously selected class to be changed. Also, the student will now be removed from the previous class list and will be placed on the new class list that the student has been moved to and the class counts and class lists will be updated as appropriate.

3. If the new class has a different class fee than the previous class, the necessary financial changes will be posted to the account as either a credit or debit entry.

Trial/Waiting Lists:

1. When a class has reached the maximum amount of student allowed, such as 12 students per class in the demo database table, ClassManager will allow you to continue to register students in the class, however, they will be entered as **Waiting List** students. This means that though their name will appear on the individual Waiting List Reports, no financial charges will be recorded in the database. Once a place opens up as a result of either a student dropping a class or through a transfer you may then go to the Waiting List registration record and click on the **Register** button at the top of the screen to change the registration to a regular registration which will cause fees to be charged.

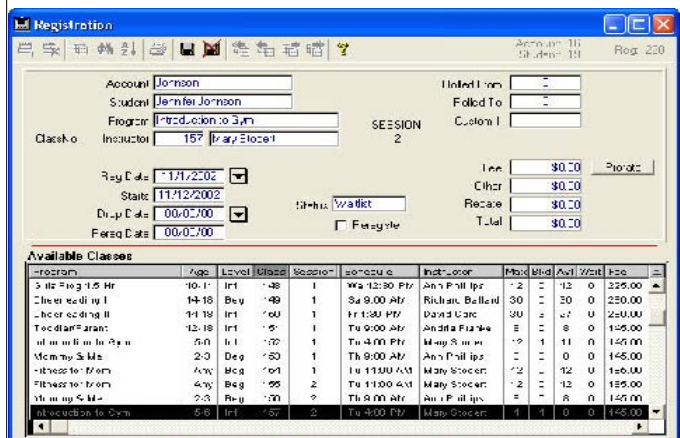


Figure 2.10

Selling Products

Charging For Products Sold:

1. From the Student form view, double-click on the heading **Product** in the Product Sale subform window.
2. This will then display the Product Sale form view (Figure 2.11)

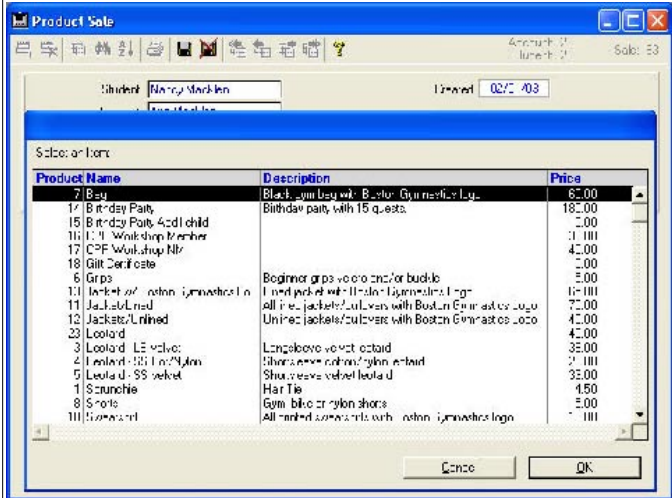


Figure 2.11

3. Select the product that the student wants by clicking on the Name popup object, double-click the desired item and then enter the quantity of product that is to be purchased.
4. Click **Save** and this will cause the product sale to be written to the Product Sale table for later billing.
5. From the menu bar at the top of the screen select **File > Open Table > Product**.
6. Once in the Product List View, click **New** in order to add some of your school's products to the list of products sold by the demo school. Any changes you make will immediately be accessible in the Product Name popup selection menu when you return to the Products Sale form.

Instructors

Adding instructors:

1. From the palette, click the **Instructor** button. This will bring up the Instructor List View. To add a new instructor click the **Add Record** button (Figure 2.12).

Descr.	Program	Time	Inst. Date	Inst. Date
162	Eng Program	We 10:00-4H	11/13/2002	1/2/2003
161	Eng Prog 1.5 Hr	We 12:30 PM - 12:30 PM	11/13/2002	1/2/2003
156	Math & M:z	Th 9:00 AM	11/14/2002	1/2/2003
151	Math & M:z	Th 11:00 AM	11/14/2002	1/2/2003
148	Eng Program	We 12:30 PM - 12:30 PM	8/4/2002	11/5/2002
1/7	Eng Program	We 10:00-4H	8/4/2002	11/5/2002

Figure 2.12

2. Enter in information for a new instructor. Note that this information will be used later in the Class Table where you will use a popup list to assign instructors to teach different classes.

3. The instructor information will also be used by the application in the Registration form when you select classes. You will see the program name, day, time, place availability, etc. of the class as well as the name of the instructor who will be teaching the class.

4. Additionally, this information will be used by the Class Calendar that can show calendars of classes broken down by instructor, program, date, etc.

5. Using the Instructor information, it is also possible to prepare reports with the Report and Quick Report Editors that shows the student body reported by Instructor. This can be most valuable when determining the attrition rate of students based on assigned instructor.

Billing

Printing Statements:

1. Printing statements can be performed immediately after creating a billable item or they can be produced in a batch mode at the end of the day, week, month, session, etc. Click **Account** on the palette then click and highlight the Janice Adams account. Now from the menu bar at the top of the screen click **Select > Show Subset**. This will change the selection of records to only that of the Adams account.
2. Click the **Print** icon on the tool bar and when the Report Manager dialog appears (Figure 2.13) select Statement Open Item and then click the **Preview** button to see a screen view of the Adams statement Item (Figure 2.14).

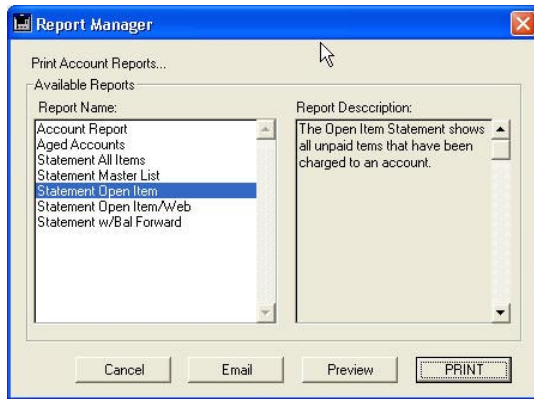


Figure 2.13

3. To print, preview or email statements just click the appropriate button the Report Manager dialog. You will be presented with the standard Print Selection dialogs (Figure 2.14) where you are asked how many copies you would like and whether the printed object should be in landscape or portrait orientation. Make your selections and then click **OK** on the PC or **Print** on the Mac. A statement will then be printed like the one depicted below (Figure 2.15)

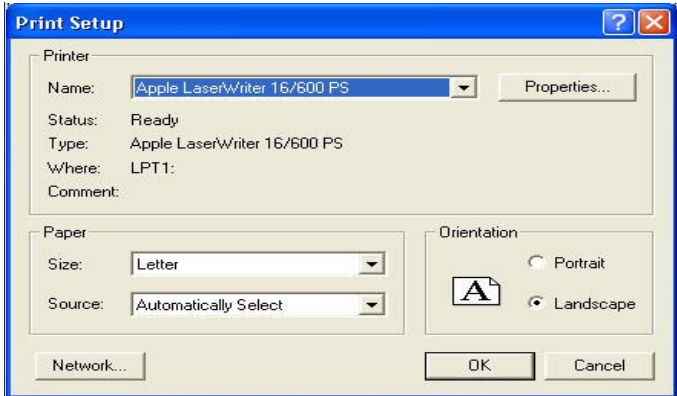


Figure 2.14

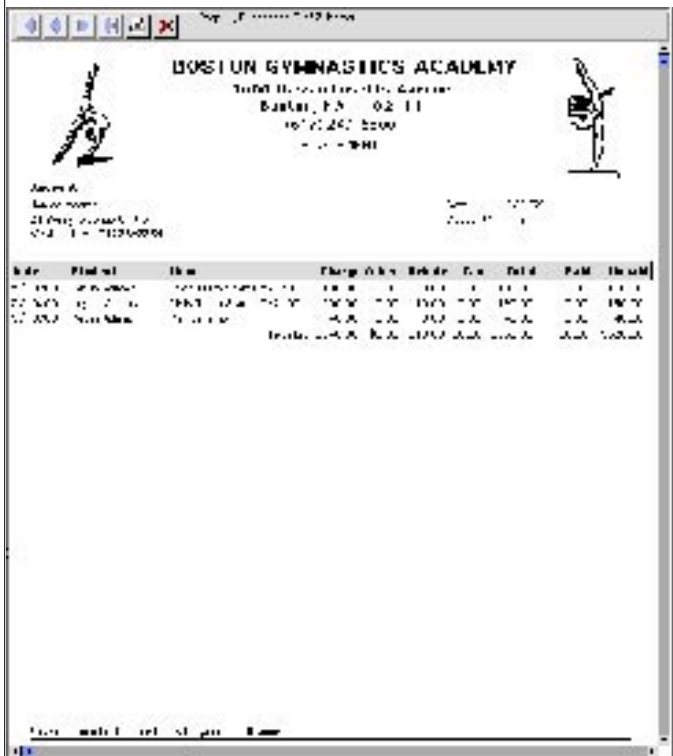


Figure 2.15

4. After statements have been distributed you will next need to enter payments into ClassManager™.

Entering Payments:

1. Payments are entered into ClassManager™ by clicking **Payment** on the palette and then by clicking the **Add Record** icon on the tool bar when the Payment List View is presented.

2. Payments may be entered either as a single entry or in a batch mode by entering dozens of payments at a time. (Figure 2.17)

Payments

Payment Form Details:

- Payment Date: 12/01/02
- Student Name: John Doe
- Method: Check
- Amount: \$380.00
- Applied: \$211.11
- Unapplied: \$168.89

Date	Student	Item	Credit
12/01/02	John Doe	Check reading II Slides 1-11/02	280.00

Date	Student	Item	Charge	Credit	Payments	Tax	Total	Paid	Unpaid
12/01/02	John Doe	Check reading I 11/06/02	250.00	0.00	0.00	0.00	250.00	250.00	0.00
09/12/02	John Doe	Check reading I 09/06/02	280.00	0.00	0.00	0.00	280.00	280.00	0.00
08/17/02	John Doe	Bill due - Pkly - 08/17/02	150.00	0.00	0.00	0.00	150.00	150.00	0.00
05/12/02	John Doe	Reg Fee	25.00	0.00	0.00	0.00	25.00	25.00	0.00
06/12/02	John Doe	Switch it	28.00	0.00	0.00	0.00	28.00	28.00	0.00
Totals			011.00	0.00	0.00	0.00	011.00	011.00	0.00

Figure 2.17

3. As payments are recorded through the Payment Form, the Account records will be updated as will the Accounts Receivable report and the Balance field that appears on the Account Form View.

4. To print out the Payments Report go to the Payment List View. Click **Edit > Select All** on the menu bar and then click the **Print** button on the Payment List View. This will bring up the Print Dialog. Select **Payment Detailed** and then make the necessary choices on the printer dialogs that will be displayed. The Payments Report will then be printed on your printer or will be printed to the screen of your monitor (Figure 2.18). Remember that prior to printing you may wish to perform a search on only one month's payment, i.e., May.

PAYMENT REPORT

Sat, Feb 01, 2003

11/01/02 TO 03/02/03

Pay#	Acct#	Account	Pay Date	Method	Check#	Check Dt	Amount
64	1	Cooper Jane	11/11/02	Check	4344	08/23/02	647.50
65	20	Macklen Ann	11/11/02	Check	433	08/22/02	215.00
97	10	Roberta Anna	11/11/02	Check	342	07/30/02	412.00
98	14	Neelson Jennifer	11/11/02	Check	3222	08/25/02	215.00
76	21	Kelley Jerald	11/11/02	Check	433	08/23/02	315.50
71	6	Dobovian Becky	11/11/02	Check	65	08/13/02	215.00
72	5	Modesto Clair	11/11/02	Check	433	08/13/02	412.00
73	4	Thompson Ann	11/11/02	Check	43	08/16/02	220.00
75	10	Dee John	02/01/03	Check	1326	02/01/03	280.00
					Check	SUBTOTAL	\$2,851.50
69	13	Adams Janice	11/11/02	M/C		08/29/02	215.00
74	2	Pearson Julie	11/11/02	M/C		09/12/02	215.00
					M/C	SUBTOTAL	\$430.00
66	19	Dee John	11/11/02	VISA		08/29/02	521.00
					VISA	SUBTOTAL	\$521.00
						TOTAL	\$ 3,882.50

Figure 2.18

Accounts Receivable:

1. If at any time you wish to see the status of all accounts in an Accounts Receivable report (Figure 2.19), click **Account** on the palette, click **Edit > Select All** on the menu bar or perform a specific search and then click **Print** on the Account List view and select **Aged Accounts**. The following report will print:

Accounts
Receivable

AGED ACCOUNTS BALANCES												
Page 1												C:02493
Acct#	Account	Address	City	Phone	Current	30 Day	60 Day	90 Day	120 Day	Total	Days	Days
13	Adams, Janice	23 Demy Avenue	Watson	(844)34-0344	0.00	0.00	100.00	0.00	0.00	100.00	0	0
1	Cooper, Jane	46 Tessa Ct	Wilmington	(817)54-0434	0.00	0.00	0.00	0.00	0.00	0.00	0	0
6	Dobovian, Becky	400 37th Street	Waltham	(817)21-1313	0.00	0.00	100.00	0.00	0.00	100.00	0	0
16	Johnson, Ann	22 Cedar Road	Dubuque	(860)22-1616	0.00	0.00	100.00	0.00	0.00	100.00	0	0
21	Kelley, Jerald	347 Main	Dubuque	(870)42-6500	0.00	0.00	200.00	0.00	0.00	200.00	0	0
58	Modesto, Clair	173 Main	Watson	(817)43-5443	0.00	0.00	100.00	0.00	0.00	100.00	0	0
5	Neelson, Jennifer	45 Washington Street	Boston	(817)34-3437	0.00	0.00	100.00	0.00	0.00	100.00	0	0
14	Pearson, Julie	87 Lakota Ave	Waltham	(817)43-5443	0.00	0.00	100.00	0.00	0.00	100.00	0	0
2	Pearson, Julie	58 Adams Place	Watson	(817)42-4875	0.00	0.00	100.00	0.00	0.00	100.00	0	0
15	Roberta, Anna	8 Demy Drive	Watson	(870)34-0443	0.00	0.00	100.00	0.00	0.00	100.00	0	0
Total Number: 13					0.00	0.00	2,040.00	0.00	0.00	2,040.00	0	0

Figure 2.19

Searching with ClassManager™

Searching

1. Searching can be performed three ways:
 - a. Quick Find
 - b. Query Editor
 - c. Query by Formula

For purposes of this demo we will cover only the Quick Find and Query Editor features.

Using Quick Find:

1. If not already there, go back to the Student List View.
2. Click the **Query** icon on the tool bar at the top of the screen.
3. This will cause the Quick Find dialog to appear (Figure 2.20)
4. Enter "**Mod**" and click the **Query** button. Quick find searches only one table at a time and is meant for rapid single table type searches. Also, you do not have to put in the complete name of a field, it will find all values beginning with

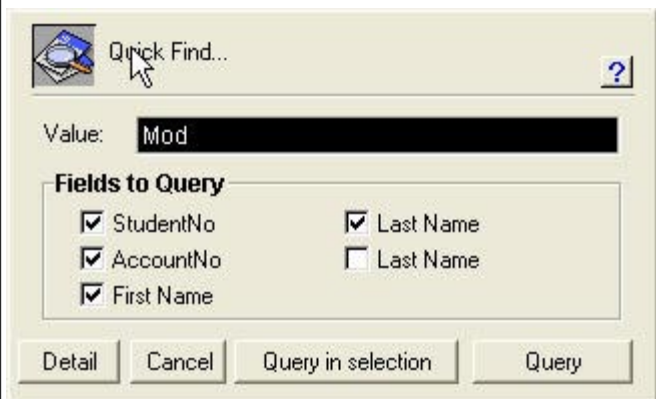


Figure 2.20

Using the Query Editor:

1. The Query Editor (Figure 2.21) is meant for more complex queries than can be performed with Quick Find. It has the advantage of being able to search across tables, i.e., from Account to Student so that many different types of queries can be performed. For this example we want to find all of the students attending the Lafayette school.
2. Select Student on the palette and then click the **Query** icon at the top of the screen and when the Quick Find editor appears select the **Detail** button.
3. Scroll down the list of **Available fields** until **School** appears and then click on School. Next click **is equal to** in the **Comparisons list** and below in **Value** enter **Lafayette** as the school name. Click **Query** to perform the query.
4. The Query Editor will now find all students at the Lafayette school and will display those students in a list view that you may print, sort, export, graph or use in another query.

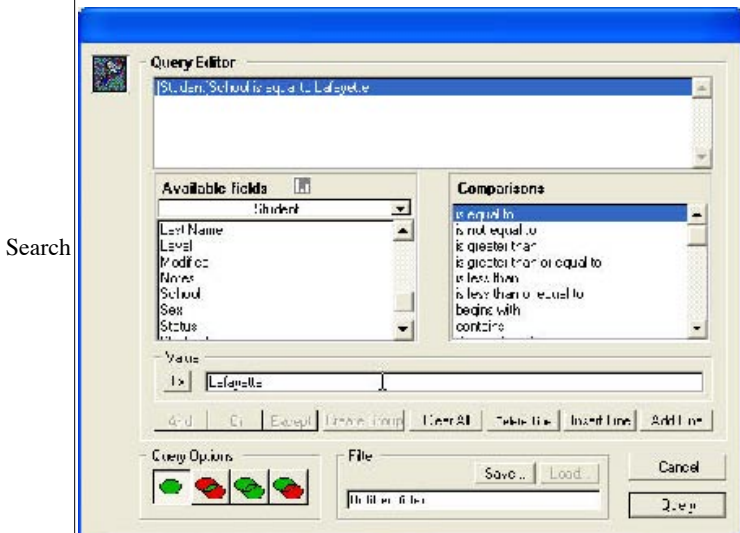


Figure 2.21

Printing

At this point you have learned how to enter and access data that has been either manually entered or imported into Class-Manager™, including selecting records and creating Account and Student records.

To Print the Data Entered:



The **Print** command can be accessed on all lists and forms.

1. Click the **Print** icon that appears on the Tool Bar of various lists and forms. After choosing the Print command you will see the Print dialogs.

(Figure 2.22).

2. Select the **Format** you wish to use.
3. Click **OK**
4. One or more Printer dialog boxes may appear.

Print

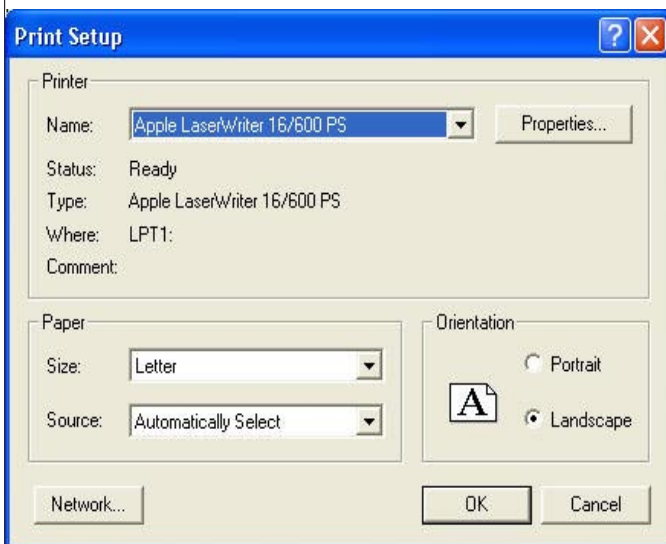


Figure 2.22

Sorting

To Sort Records:



The **Sort** function can be accessed from all the List Views.

1. Click the **Sort** icon on the tool bar.
2. After choosing the Sort function you will see the Quick Sort Editor dialog (Figure 2.23).

Sort



Figure 2.23

4. The Quick Sort dialog allows you to select sort order by clicking on the field names in the dialog, however, like Quick Find it is meant to be used for sorting only in a single table and therefore is to be used in rather simple sorts.
5. To perform more complex sorts you should click the **Detail** button on the Quick Sort dialog in order to bring up the Sort Editor (Figure 2.24)
6. To perform a multi-table sort, locate and then click on the field that you want the sort to be based on, i.e., Account.
7. Click on the arrow-within-a-box if you want the sort to be descending. The arrow should be pointed up for ascending.
8. Click on another field, i.e. Status if you want a two level sort to be performed.
9. Click **Order by to** begin sort.
10. Your screen will display the records in the new sorted

order. If you click the **Print** icon, you will get the Order By dialog again to sort a printed report..

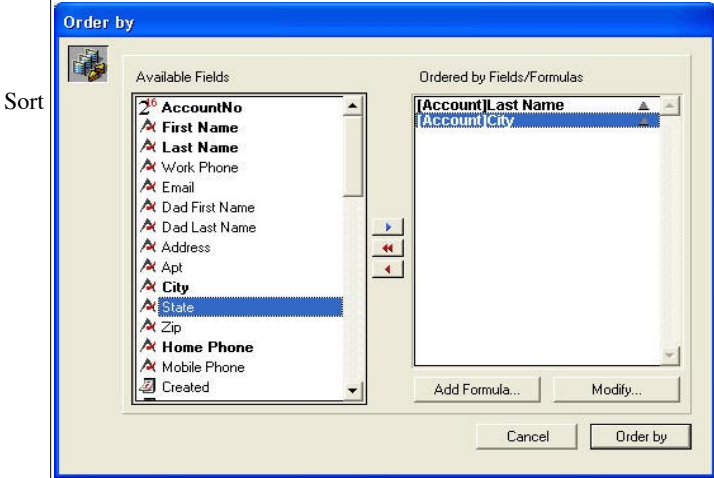


Figure 2.24

Creating Visual Reports:

Charting

1. The **Chart Editor** can be accessed from any List View by clicking on the Chart Icon on the tool bar.

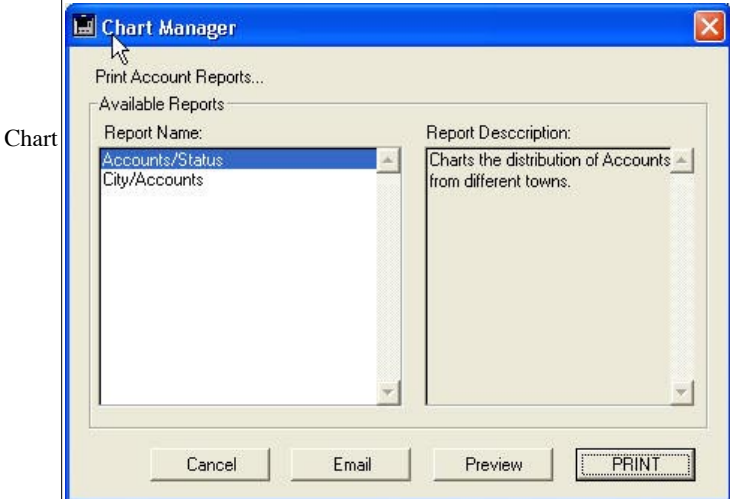


Figure 2.25

The Chart Wizard allows you to select a chart type and to prepare two-dimensional charts.

To Display a Chart:

1. Go to the palette and click **Student** and then on the menu bar click the **Tools > Special Functions > Chart Editor**.
2. Select **Chart Editor** from the displayed print list.
3. After the Chart Editor appears, click on the far left School/Student. This will display the Chart Wizard (Figure 2.25). Click on the Pie Chart and then on the Data Selection Tab. Next select **Student** from the pop-up list and double-click **Program** and **Counter** from the list and click **OK**.
4. Select **Chart** on the tool bar and then **Values > Position > Outside Display > Category & Percent** click **OK**.

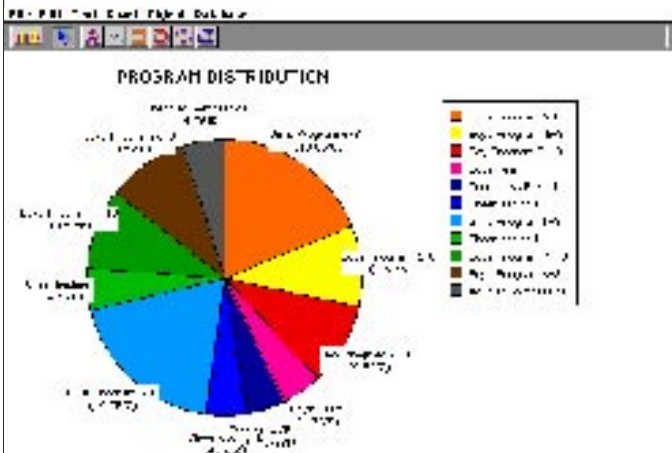


Figure 2.20

5. To create additional charts remember to first click on the item you wish to have charted, i.e., Sex, School, City, Status, Interest, Class, Payment Type, Referral Source, Pay Method, etc. and then click "Counter."
6. The Chart Editor can be used to chart literally hundreds of different business situations and can produce results that are easier to understand than regular numeric reports.

Reports:

1. Throughout ClassManager™ you will find reports that are attached to the form and list view of the various tables or can be accessed from the SuperReport or Quick Editor.

2. Some of these reports are:

Account Report	Statement Report
Aged Accounts	Membership Report
Student Report	Statements
Instructor Report	Reg Fee Revenue
Payment Report	Picture Class List
Class Report	Scheduling Report
Class Lists	Attendance Report
Class List w/Balances	Waiting List Report
Class Openings Report	Instructor Schedule
Class Revenue Report	Drop Report
Revenue Category Report	Transfer Report
Product Reports	Monthly Calendar
Product Sales Report	Class Calendar
Program Report	Instructor Calendar
Bank Deposit Report	Program Calendar
Birthday Report	Labels 3 x 10
Class Income Report	Instructor Efficiency
Class Loading Report	Duplicate Report
Credit Report	USAG Member Report



Chapter 3

Additional Features

Additional Features

In this chapter we will briefly outline some of the additional features you will find in ClassManager™. Explore these features on your own or call Technical Support for more details.

Administrative Tasks

Administrative tasks include adding and deleting instructors, checking and reviewing duplicates that might have been manually entered, editing the Product table, reassigning instructors, exporting records for a direct mail campaign (Figure 3.1), adding and deleting passwords (Figure 3.2) and rolling over registrations and classes at the end of a session prior to billing all students for the upcoming period.

Automatic Zip Code Lookup

ClassManager™ will automatically look up the correct city and state when you enter the appropriate Zip Code.

Class Assignment

When you select an class for a new student entry, ClassManager™ will automatically enter the appropriate class information as well as all the necessary financial information.

Label Editor

The Label Editor (Figure 3.3) is a powerful tool that allows the user to create custom label templates. Labels may be printed from the **Label Editor** by selecting **the Label Icon** from the Account, Student or Instructor List Views.

Report Editor

The Report Editor is a powerful ClassManager™ tool that allows the user to create custom report templates (Figure 3.4). This editor can produce more complex reports than is possible when using the Quick Report Editor and permits the user to make use of the the databases language.

Export

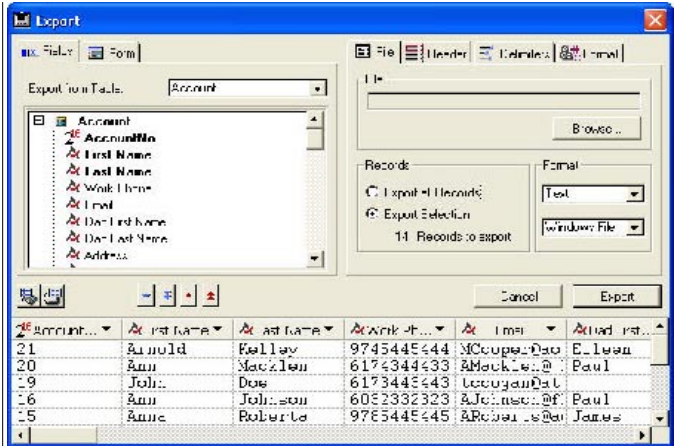


Figure 3.1

Password

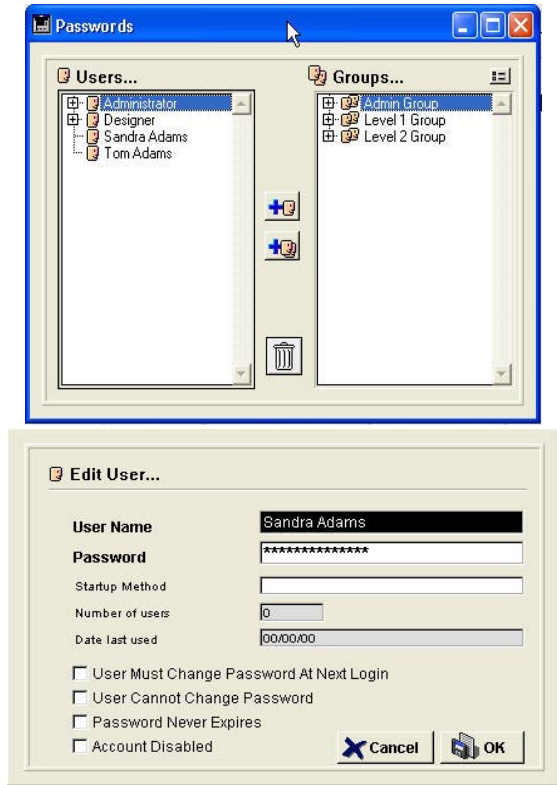
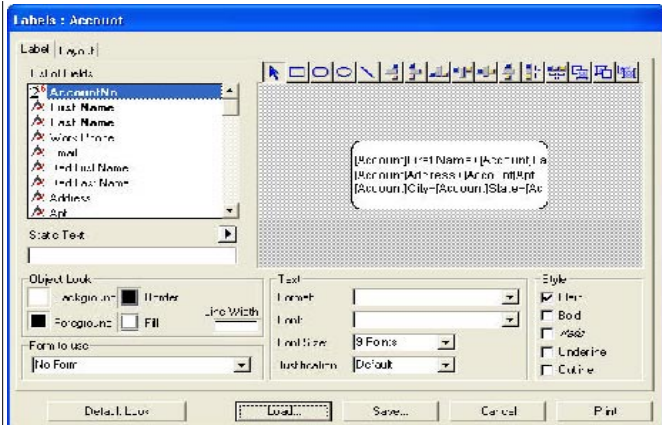


Figure 3.2

Label



Figure

Figure 3.3

SuperReport

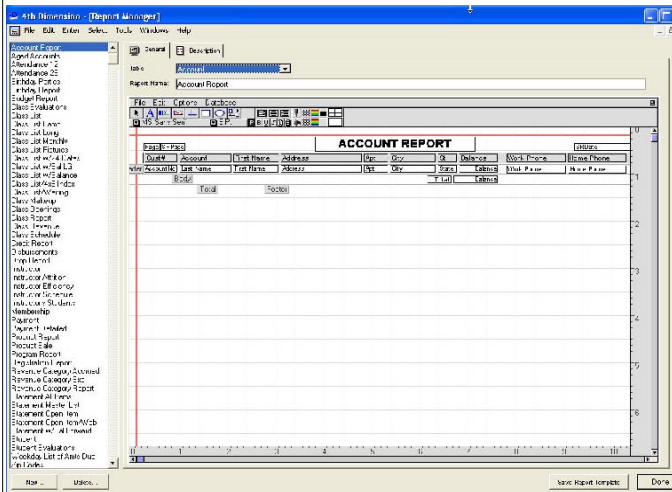


Figure 3.4

Choice List

Throughout ClassManager™ you will find a number of Choice List that the user can tab into or click on to make a selection, i.e., Referred By, Status, Interest on the Account Form and School, Session and Status on the Student Form. If you wish to change the choices just click on the Menu Bar **File > Administration > List Editor**. This will cause the List Editor to be displayed where you may add, delete or insert your own entries (Figure 3.5).

Popup

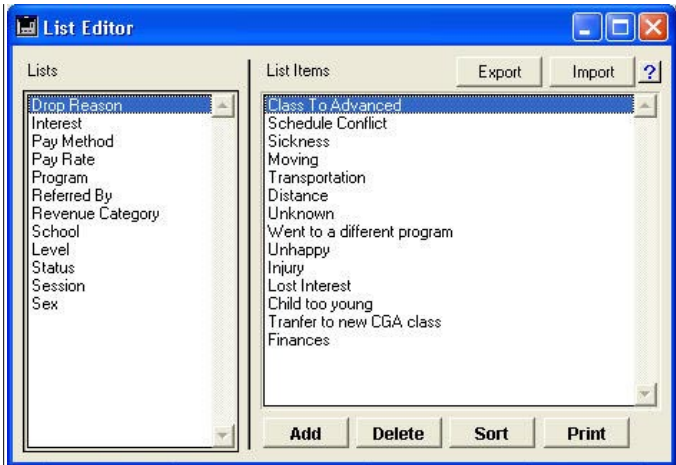


Figure 3.5

Global Updates of Records

In many cases it is necessary to make global changes to a table such as changing 1,500 records from one status to another, i.e., changing records that have a condition of active to inactive. This type of mass change can be accomplished by using the Modify Record feature (Figure 3.6). Like the Quick Report and SuperReport Editors, the Apply Formula Editor can make use of the 4D language thereby greatly extending the power of this editor to modify data tables in many different ways.

Formula

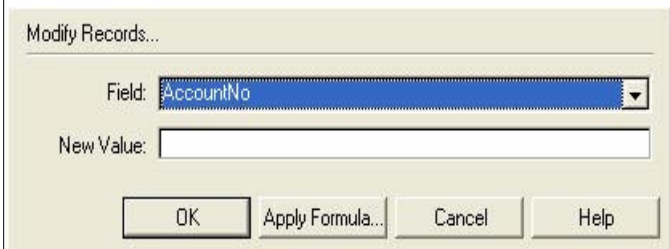


Figure 3.6

System Setup

One of the first tasks you will have after installing ClassManager™ is to setup the application to meet the specific business rules that you have established for your school. To see how this is done in ClassManager™, select **File > Open Table > Set Up** and review the System Setup (Figures 3.6 - 3.10) that has been established for the demo school. Remember to click the **Next Record** icon to see page two through five.

SYSTEM SET UP

A file fee of will be assessed for payments received 15 days after the Billing Date.
 Students will be billed an annual registration fee of and not to exceed per account.
 1 year Dollars Per Cent. discount for or more registrations per account in previous
 3 years Dollars Per Cent. discount for or more registrations per account in month.

NO CLASS DATES

Date 1	12/01/02	Date 2	12/01/02	Date 3	12/01/02	Date 4	12/01/02	Date 5	12/01/02	Date 6	12/01/02
Date 7	12/01/02	Date 8	12/01/02	Date 9	12/01/02	Date 10	12/01/02	Date 11	12/01/02	Date 12	12/01/02
Date 13	12/01/02	Date 14	12/01/02	Date 15	12/01/02	Date 16	12/01/02	Date 17	12/01/02	Date 18	12/01/02
Date 19	12/01/02	Date 20	12/01/02	Date 21	12/01/02	Date 22	12/01/02	Date 23	12/01/02	Date 24	12/01/02
Date 25	12/01/02	Date 26	12/01/02	Date 27	12/01/02	Date 28	12/01/02	Date 29	12/01/02	Date 30	12/01/02

Sound bell for each class? Yes No
 Refuse Wait List? Yes No
 Scribe Fee %

Auto Registration Fees? Yes No
 Trig Classes? Yes No
 Web Notice? Yes No
 Notify After Absences

Return Email
 Mail Host
 Password

Figure 3.6

SESSION REGISTRATION SET UP

	START DATE	END DATE	REGISTRATIONS PERMITTED BY
1121 N 1	6/5/2002	1/15/2003	<input type="radio"/> Yes <input type="radio"/> No
ESS Ch 2	11/7/2002	1/7/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
ESS Ch 3	1/19/2003	3/25/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
ESS Ch 4	7/17/03	10/27/03	<input type="radio"/> Yes <input checked="" type="radio"/> No
ESS Ch 5	6/8/2003	8/5/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
ESS Ch 6	7/27/03	10/27/03	<input type="radio"/> Yes <input checked="" type="radio"/> No
ESS Ch 7	00/00/00	00/00/00	<input type="radio"/> Yes <input checked="" type="radio"/> No
ESS Ch 8	00/00/00	00/00/00	<input type="radio"/> Yes <input checked="" type="radio"/> No
ESS Ch 9	00/00/00	00/00/00	<input type="radio"/> Yes <input checked="" type="radio"/> No
1121 N 10	00/00/00	00/00/00	<input type="radio"/> Yes <input checked="" type="radio"/> No
ESS Ch 11	00/00/00	00/00/00	<input type="radio"/> Yes <input checked="" type="radio"/> No
1121 N 12	00/00/00	00/00/00	<input type="radio"/> Yes <input checked="" type="radio"/> No

Enter Sessions

Figure 3.7

Note that ClassManager™ allows you the options of billing on a session and monthly basis at the same time, i.e., classes on a 12 week session basis and teams on a monthly basis. ClassManager can also be configured to bill on an hourly basis (Figure 3.9). If the hourly system is used you cannot use the Session or Monthly systems. Lastly, see Figure 3.10. This entry form is used to enter information about you school which will appear at the top of the invoice form.

SESSION	START DATE	END DATE	REGISTRATIONS INCLUDED (Y/N)
MONTH 1	1/1/2003	1/31/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
MONTH 2	2/1/2003	2/28/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
MONTH 3	3/1/2003	3/31/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
MONTH 4	4/1/2003	4/30/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
MONTH 5	5/1/2003	5/31/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
MONTH 6	6/1/2003	6/30/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
MONTH 7	7/1/2003	7/31/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
MONTH 8	8/1/2003	8/31/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
MONTH 9	9/1/2003	9/30/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
MONTH 10	10/1/2003	10/31/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
MONTH 11	11/1/2003	11/30/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No
MONTH 12	12/1/2003	12/31/2003	<input type="radio"/> Yes <input checked="" type="radio"/> No

Figure 3.8

Use hourly rate based tuition

0.25	\$0.00	2.25	\$0.00	4.25	\$0.00	6.25	\$0.00
0.5	\$0.00	2.5	\$0.00	4.5	\$0.00	6.5	\$0.00
0.75	\$0.00	2.75	\$0.00	4.75	\$0.00	6.75	\$0.00
1.0	\$0.00	3.0	\$0.00	5.0	\$0.00	7.0	\$0.00
1.25	\$0.00	3.25	\$0.00	5.25	\$0.00	7.25	\$0.00
1.5	\$0.00	3.5	\$0.00	5.5	\$0.00	7.5	\$0.00
1.75	\$0.00	3.75	\$0.00	5.75	\$0.00	7.75	\$0.00
2.0	\$0.00	4.0	\$0.00	6.0	\$0.00	8.0	\$0.00

Figure 3.9

Email

Email can be accessed in ClassManager by clicking on the envelope icon on the menu bar on the Account list view and input form. If you select multiple accounts, i.e., 300 accounts, all 300 accounts will receive an individual email.

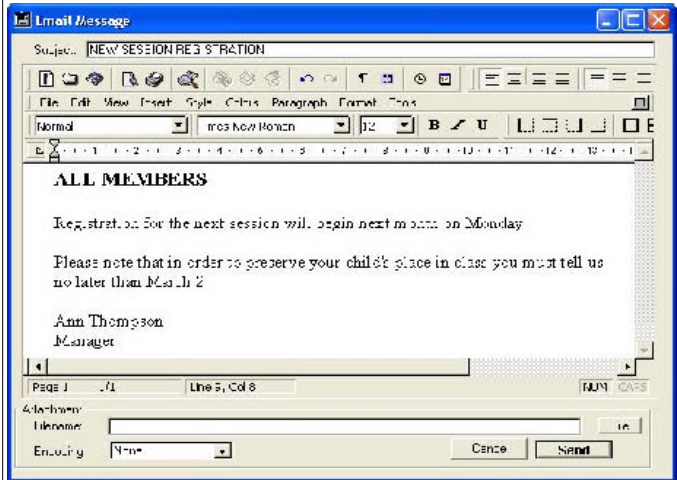


Figure 3.10

Spell Checking

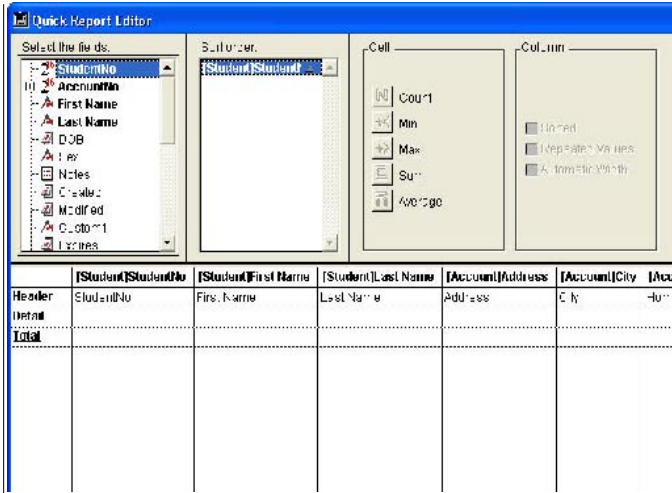
All of the note boxes that appear in ClassManager™ on the Account, Student, Class, Instructor, Product, Payment, windows, etc. make use of an automatic spell checker which will appear if the spell checker detects that a word has been incorrectly spelled. The spell checker works like any checker found in a word processor and can be dismissed by clicking the **Done** button.



Quick Report Editor

1. The Quick Report Editor is a powerful tool that allows the user to create custom reports (Figure 3.12). Using the Quick Report Editor, a user can report across table relations and thus create any possible combination of reports. An example of the use of the Quick Report Editor might be to search for all accounts in your general area whose children are in the 2 to 10 year old age bracket. The Quick Editor would then print a listing of these accounts.
2. To create this report go to the Account List View, select all records by clicking **Edit** and **Select All** on the Menu Bar and select **Query** at the top of the List View screen.
3. Once in the Find dialog click **Detail** to bring up the Query Editor. In the Query Editor click on the **Available fields** Popup and select **Student**. Now click **DOB is is greater than or equal** to and enter the value **01/01/90**. Click below on **Add Line** and then enter again **DOB is less than or equal** to and enter the value **01/01/96**. Click **Query** and the search result of nine accounts with children of the searched for age will appear.
4. Next on the tool bar click the **Quick Report** icon. Once in the Quick Report Editor drag First Name, Last Name, Address, Apt, City, State, Zip, Home Phone and Emerg Phone to the top of the report screen. Click on the menu bar **File > Header & Footers...** and enter in the Center Header box the title **Account Report**.
5. Click **OK** to return to the Quick Report Editor. Now click **File > Print** from the menu bar in order to print out your report.
6. If you wish you can sort on various fields in the report by first highlighting a field column and then by clicking the Sort check box in the Column area at the top of the editor. There are many other capabilities that the Quick Report Editor has which are explained in detail in the User Manual that comes with ClassManager™.

Quick Report



Word Processor

Customized Letters:

ClassManager™ can be configured with a custom Word Processor . It can be very useful for printing hundreds of letters used to solicit new accounts. The word processor is easy to use and extremely powerful. To prepare a series of letters do the following:

1. Click Account on the palette to display the Account Table. Click on the **Query** icon and then **Detail** to select the Query Editor.
2. Click **Status**, "**is equal to**" and then enter **Prospect** in the value field and then click **Query**.
3. On the menu bar select the **Letters** icon. The Document Manager dialog will now be displayed showing preformatted letters.
4. Click **Membership Drive** letter on the dialog and then click the **Preview** button to see a screen Preview of the letter.
5. To print letters just click the **Print** button and select your appropriate printer.

Word
Processor

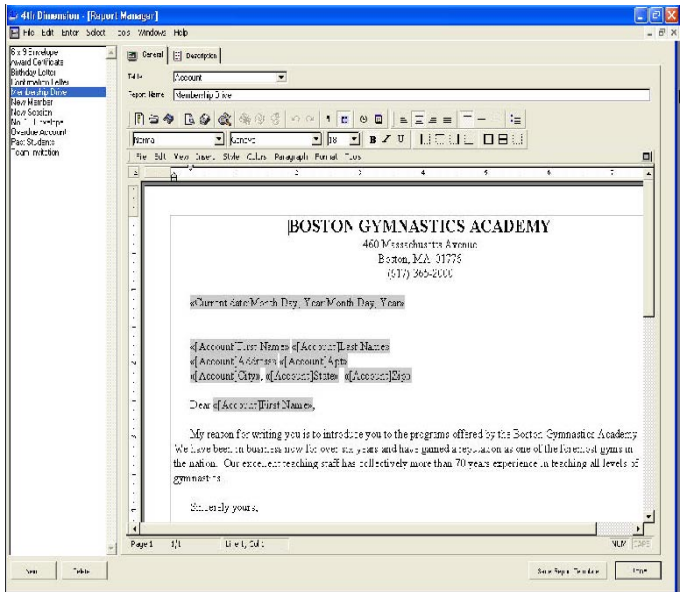


Figure 3.13

Calendar:

The calendar function allows you to display or print, in a 30 day calendar, class information by month, program or instructor. To view or print the calendar select the Calendar icon on the tool bar (Figure 3.14).

Calendar

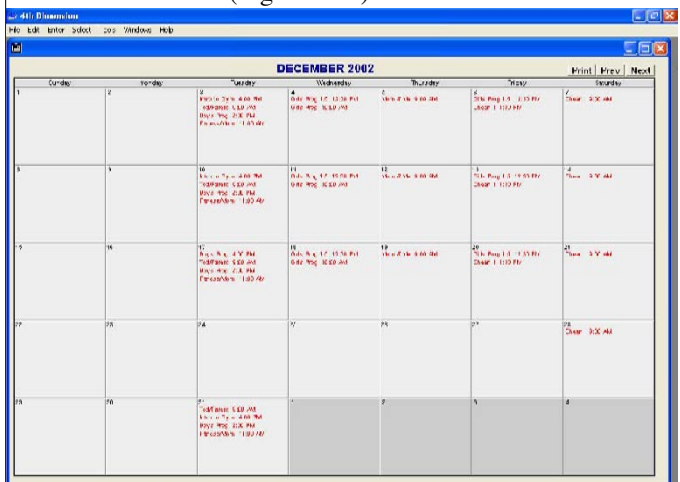


Figure 3.14

Importing and Exporting Data

ClassManager™ imports database information using the Import Editor. This should only be performed by the Database Administrator since the potential exist for overwriting of existing information. The ClassManager™ Import Editor is easy to use and imports data rapidly.

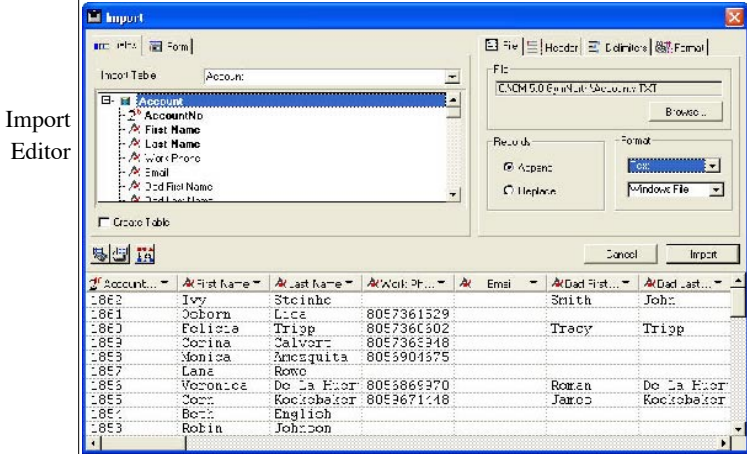


Figure 3.15

In addition to the above discussed techniques for searching and reporting on data in ClassManager™, the application can also have a built-in spreadsheet. Click on Payment on the menu bar and then click the Spreadsheet icon.

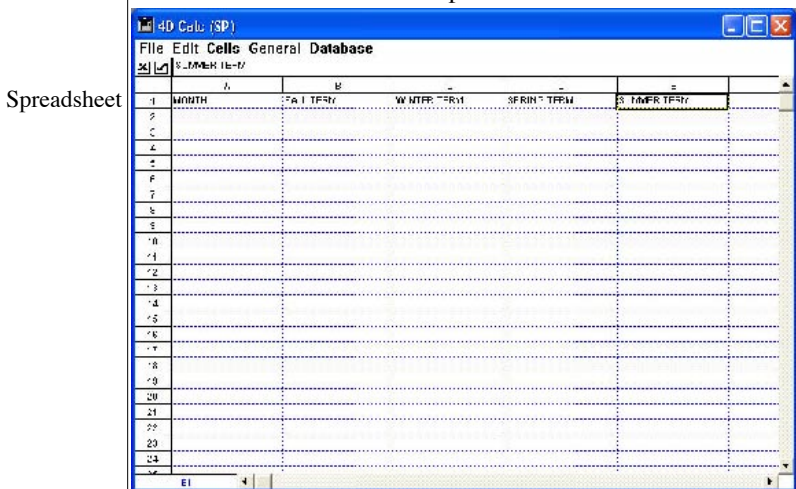


Figure 3.16

Duplicate Checking

One of the major objectives for any database system is to maintain a clean database free of duplicate records. Often this is very hard to do if records are imported from an outside source. When records are imported it is often necessary to dedup the target file after the records have been brought in through the use of a special duplicate checking procedure. This capability is provided in ClassManager™ through selecting on the menu bar **Tools > Special Functions. > Find Duplicates** (Figure 3.17). The result of running this routine is a list of duplicate records that can be selectively deleted so as to purge the database of unwanted duplicates (Figure 3.18).

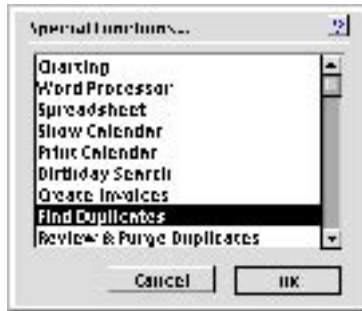


Figure 3.17

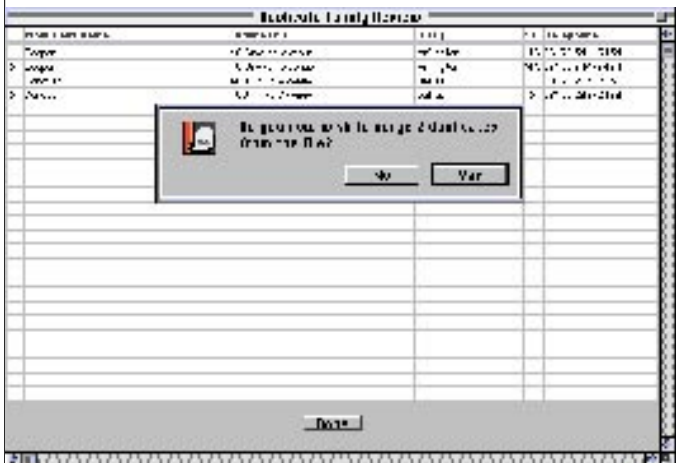


Figure 3.18

EXAMPLE REPORTS

LUSTON BYRNASTICS ACADEMY

401 Washington Avenue
Boston, MA 02108
Tel: 617-552-2200

ENROLLMENT LIST

PROGRAM: *Acrobatics 101* AID: 100000 500
 START DATE: 10/01 ENROLLMENT PERIOD: 10
 END DATE: 10/31/00 ENROLLMENTS BOOKED: 0
 ACTIVITIES: 0 1000000000 1000000000
 ENROLLMENT DATE: 10/27/00

ACT NAME	FIRST NAME	LAST	ADDRESS	CITY	ATTENDANCE												
					1	2	3	4	5	6	7	8	9	10			
Adams	John	12345	67 St	08000	00	00	00	00	00	00	00	00	00	00	00	00	00
Cooper	John	56789	101 St	02100	00	00	00	00	00	00	00	00	00	00	00	00	00
Green	John	98765	101 St	02100	00	00	00	00	00	00	00	00	00	00	00	00	00
Johnson	John	01234	101 St	02100	00	00	00	00	00	00	00	00	00	00	00	00	00
Smith	John	43210	101 St	02100	00	00	00	00	00	00	00	00	00	00	00	00	00

CLASSIFICATION REPORT

Year	Age	Sex	Enrollment	Enrollment	Enrollment	Enrollment	Enrollment
Acrobatics 101	10	M	10/01/00	10/01/00	10/01/00	10/01/00	10/01/00
Acrobatics 102	10	F	10/01/00	10/01/00	10/01/00	10/01/00	10/01/00
Acrobatics 103	10	M	10/01/00	10/01/00	10/01/00	10/01/00	10/01/00
Acrobatics 104	10	F	10/01/00	10/01/00	10/01/00	10/01/00	10/01/00
Acrobatics 105	10	M	10/01/00	10/01/00	10/01/00	10/01/00	10/01/00
Acrobatics 106	10	F	10/01/00	10/01/00	10/01/00	10/01/00	10/01/00

INVOICE REPORT

Invoice #	Invoice Date	Invoice Description	Invoice Amount	Invoice Balance	Invoice Total	Invoice Balance	Invoice Total
100000	10/01/00	Acrobatics 101	100.00	100.00	100.00	100.00	100.00
100001	10/01/00	Acrobatics 102	100.00	100.00	100.00	100.00	100.00
100002	10/01/00	Acrobatics 103	100.00	100.00	100.00	100.00	100.00
100003	10/01/00	Acrobatics 104	100.00	100.00	100.00	100.00	100.00
100004	10/01/00	Acrobatics 105	100.00	100.00	100.00	100.00	100.00
100005	10/01/00	Acrobatics 106	100.00	100.00	100.00	100.00	100.00
TOTAL			600.00	600.00	600.00	600.00	600.00

CLASS REVENUE REPORT

Program	Enrollment	Enrollment	Enrollment	Enrollment	Enrollment	Enrollment	Enrollment	Enrollment
Acrobatics 101	10	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Acrobatics 102	10	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Acrobatics 103	10	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Acrobatics 104	10	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Acrobatics 105	10	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Acrobatics 106	10	100.00	100.00	100.00	100.00	100.00	100.00	100.00
TOTAL	60	600.00	600.00	600.00	600.00	600.00	600.00	600.00

PRODUCT REPORT

06/24/1987

Product#	Product Name	Price	Description
1	Product 1	1.00	Description 1
2	Product 2	2.00	Description 2
3	Product 3	3.00	Description 3
4	Product 4	4.00	Description 4
5	Product 5	5.00	Description 5
6	Product 6	6.00	Description 6
7	Product 7	7.00	Description 7
8	Product 8	8.00	Description 8
9	Product 9	9.00	Description 9
10	Product 10	10.00	Description 10
11	Product 11	11.00	Description 11
12	Product 12	12.00	Description 12
13	Product 13	13.00	Description 13
14	Product 14	14.00	Description 14
15	Product 15	15.00	Description 15
16	Product 16	16.00	Description 16

PRODUCT SALES REPORT

06/24/1987

Order#	Customer#	Date	Product	Qty	Description	Unit Price	Net Price	Total Price
1	1	06/24/87	Product 1	1	Description 1	1.00	1.00	1.00
1	1	06/24/87	Product 2	2	Description 2	2.00	4.00	4.00
Total								5.00

PAYMENT REPORT

06/24/1987

Payment#	Invoice#	Entity	Pay Method	Pay Date	Check#	Cash Date	Amount
1	1	Customer	Cash	06/24/87	100	06/24/87	100.00
2	2	Customer	Check	06/24/87	101	06/24/87	200.00
3	3	Customer	Check	06/24/87	102	06/24/87	300.00
Total							600.00

INVENTORY REPORT

Inventory#	Product#	Quantity	Unit Price	Total Price	Description	Unit Price	Total Price
1	Product 1	10	1.00	10.00	Description 1	1.00	10.00
2	Product 2	20	2.00	40.00	Description 2	2.00	40.00
3	Product 3	30	3.00	90.00	Description 3	3.00	90.00
4	Product 4	40	4.00	160.00	Description 4	4.00	160.00
5	Product 5	50	5.00	250.00	Description 5	5.00	250.00
6	Product 6	60	6.00	360.00	Description 6	6.00	360.00
7	Product 7	70	7.00	490.00	Description 7	7.00	490.00
8	Product 8	80	8.00	640.00	Description 8	8.00	640.00
9	Product 9	90	9.00	810.00	Description 9	9.00	810.00
10	Product 10	100	10.00	1000.00	Description 10	10.00	1000.00
11	Product 11	110	11.00	1210.00	Description 11	11.00	1210.00
12	Product 12	120	12.00	1440.00	Description 12	12.00	1440.00
13	Product 13	130	13.00	1690.00	Description 13	13.00	1690.00
14	Product 14	140	14.00	1960.00	Description 14	14.00	1960.00
15	Product 15	150	15.00	2250.00	Description 15	15.00	2250.00
16	Product 16	160	16.00	2560.00	Description 16	16.00	2560.00

CUSTOMER REPORT

August 1977

First Name	John	Home Phone	0-324-1100
Last Name	Smith	Work Phone	0-324-1100
Address 1	123 Main St	Alt Phone	0-324-1100
Address 2	Apt 45	Facsim	
City	NYC		
State / Zip	NY 10001		

Notes

Customer is currently on program. He is interested in the program and has been referred by the instructor.

Referred By	John Doe	Salary	1000	Crack Date	12/31/75
Linkable Name	John Doe	Interest	High	Mod Date	12/31/77
Disc Enabled	Yes	Balance	1000	Payoff	0

Students

Student ID	Last Name	DOB	Age	Sex	Class	Program
10001	Smith	12/31/77	0	M	Y	10001
10002	Smith	12/31/77	0	M	N	10001

STUDENT REPORT

Thu, Sep 20, 1977

Student ID	10001	Create/Mod DL	12/31/75
Cust Name	John Smith	Member Exp DL	12/31/77
First Name	John	School	High
Last Name	Smith	Prog Interest	High
D.O.B./Age	12/31/77 / 0	Session	10001
Sex/Class#	M / Y	Day	Monday

Notes

Customer is currently on program. He is interested in the program and has been referred by the instructor.

Enrollments

Program	START DATE	END	INSTRUCTOR	ENROLL
10001	12/31/75	12/31/77	John Doe	10001

Products

Product	Price	Quantity	Subtotal	Product Tax
10001	1000	1	1000	1000
10002	1000	1	1000	1000



Chapter 4

Creating A New Data File

Creating Your Own Data File

If you have not done so, we **highly recommend** that you familiarize yourself with ClassManager™ by going through Chapter 2 - Quick Tour, before creating your own data file.

Before creating your own data file, experiment using the demo data and at least some of the functions in ClassManager™.

A new data file can only be created while launching ClassManager™.

Note: To prevent accidental entry of live data into the demo file we recommend removing the Sample Data file, called **CM_5sd.4DD** and **CM_5sd.4DR** before creating a new data file.

To Create a New Data File:

1. Launch ClassManager™.
2. After entering your User Name and Password, hold down the **Alt** button and click **Connection**.
3. You will now see the Open Data File dialog. (Figure 4.1)

Open
Data
File

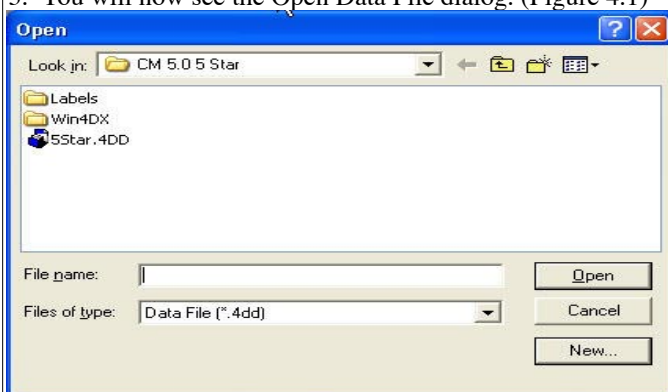


Figure 4.1

4. Click the **New...** button.
5. You will now see the New data file dialog (Figure 4.2).
6. Enter the name you want to give the new data file.
7. Click **Save**.

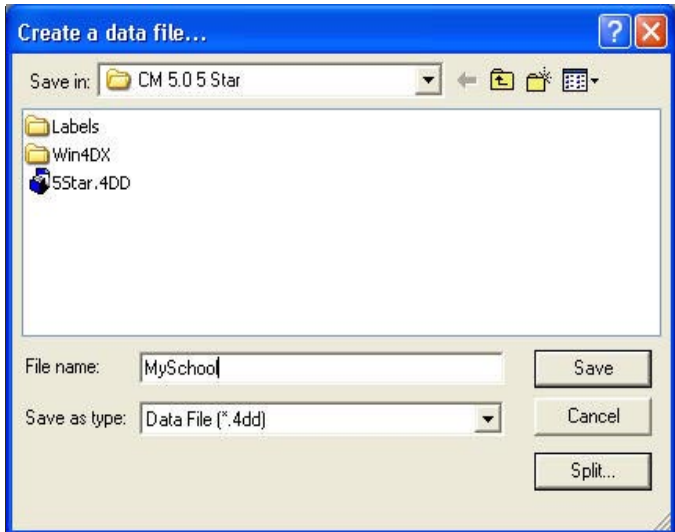


Figure 4.2

ClassManager™ will create the data file on the selected hard drive and then continue to load and run. Since this is a new data file, the Account, Student, Instructor, Program, Class, Registration, Product, Product Sale, Reg Fee, Payment, Setup, etc. tables will be empty and it will be necessary for you to enter your own data in order to use ClassManager™.

Initial Setup

1. Click on **File > Open Table..** on the menu bar and click on **Setup** in the Table Selection dialog to establish the business rules that your school will use with ClassManager™.
2. Next, select **Program** from the Table Selection dialog to establish your school's Programs, then double-click on the **Classes** subform window in Program to establish the dates and times of the classes.
3. You can now select the **Account** item on the palette and choose **Add Record** to begin entering your own information.

Congratulations! You have now completed the minimum steps for creating a working ClassManager™ Data File.

NOTES

NOTES

ClassManager™

Price List



Product Demonstration Kit	Free
Single User	
ClassManager™ Single-User System	\$ 1,995
Multi-User*	
ClassManager™ 2-User System	\$ 2,995
ClassManager™ 3-User System	3,995
ClassManager™ 4-User System	4,995
ClassManager™ 5-User System	5,995
ClassManager™ 6-User System	6,995
Options	
CM Word Processor per license	\$ 295
CM SpreadSheet per license	295
Customization Services	Per Quote

Support

First 30 days is included in the purchase price

Basic Monthly Support

Unlimited phone & email support

Single-User per license	\$ 85
Multi-User per license	65

Comprehensive Monthly Support

Includes unlimited support & all upgrades

Single-User per license	\$ 125
Multi-User license	85

Prices are effective January 1, 2002 and are subject to change without notice. All prices are quoted in US dollars. Sales taxes will be added for all states and provinces where they are in effect.

*Requires the separate purchase of the 4D Server engine

Monthly Purchase Schedule²



Single User

ClassManager™ One-User 12 Months	\$ 325
ClassManager™ One-User 24 Months	\$ 250
ClassManager™ One-User 36 Months	\$ 210

2 User Client/Server

ClassManager™ Two-User 12 Months	\$ 600
ClassManager™ Two-User 24 Months	\$ 455
ClassManager™ Two-User 36 Months	\$ 395

3 User Client/Server

ClassManager™ Three-User 12 Months	\$ 815
ClassManager™ Three-User 24 Months	\$ 595
ClassManager™ Three-User 36 Months	\$ 565

4 User Client/Server

ClassManager™ Four-User 12 Months	\$ 998
ClassManager™ Four-User 24 Months	\$ 750
ClassManager™ Four-User 36 Months	\$ 695

5 User Client/Server

ClassManager™ Five-User 12 Months	\$1246
ClassManager™ Five-User 24 Months	\$ 948
ClassManager™ Five-User 36 Months	\$ 895

6 User Client/Server

ClassManager™ Six-User 12 Months	\$1460
ClassManager™ Six-User 24 Months	\$1085