ClassManager™
Demo Manual

ClassManager™

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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 ClassManager™, 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 ClassManager 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.

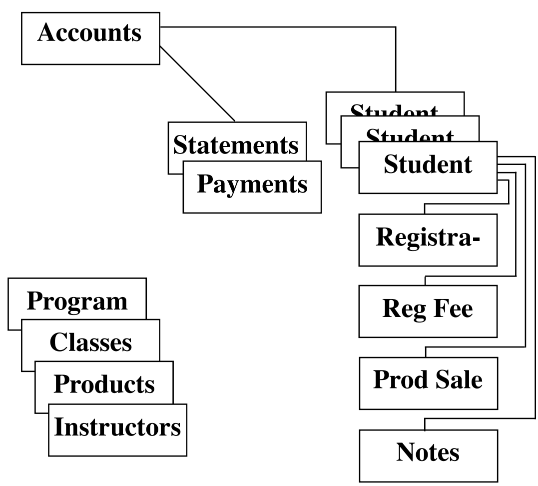
12. **Reg Fee** - records information on all students who have paid or are due to pay their annual fees. Used also by the account table for collecting annual registration fees.

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 classess, nineteen registionss, 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

Help

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

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.

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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 Dialog

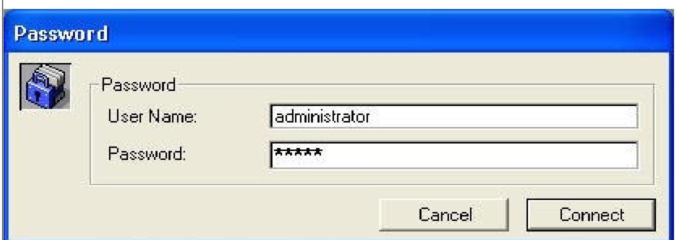


Figure 2.1

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 Selection 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)

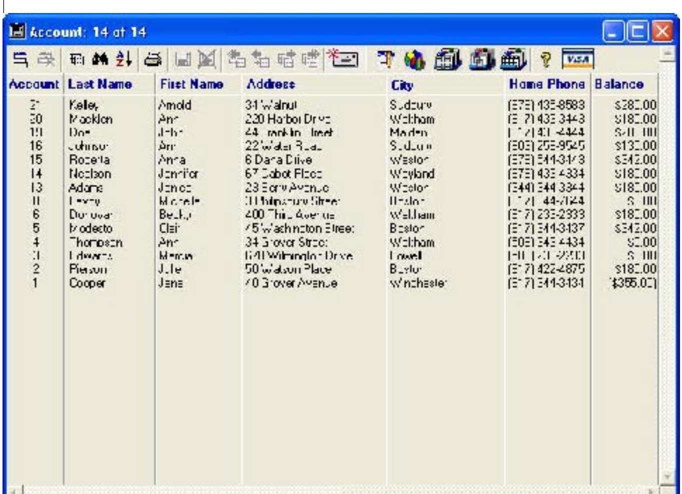


Figure 2.3

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).

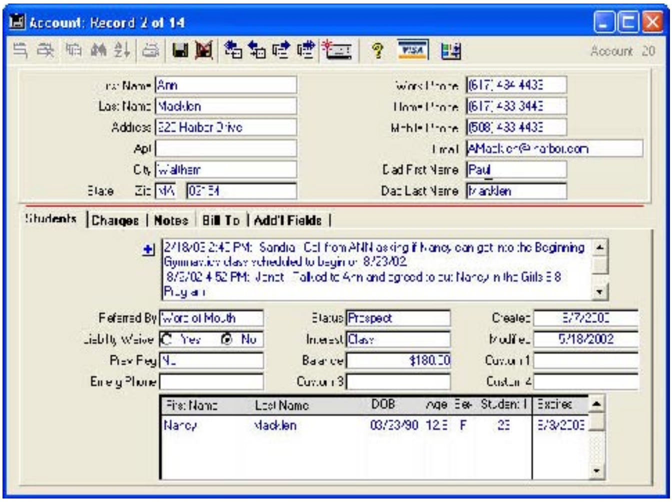


Figure 2.4

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

Adding Registrations

2. Double-click in the Student Subform Window on the Account form to create a new student record. This will cause a new student record to be automatically created (Figure 2.5).

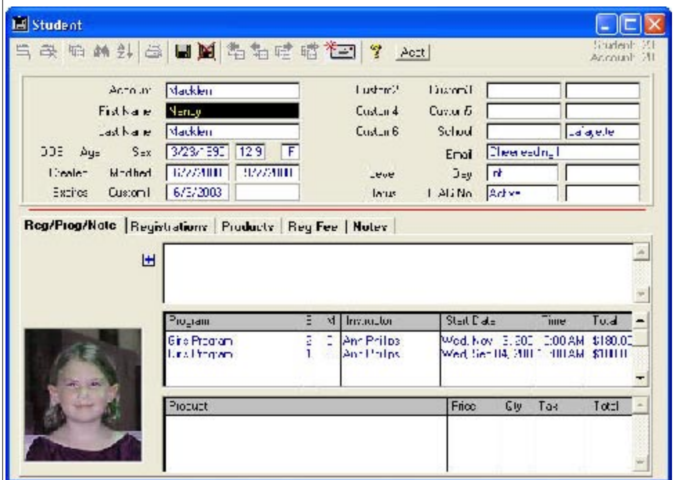


Figure 2.5

3. After you have entered the new student's name information, click **Save** and then double-click on **Student Name** in the Registration subform window. This will display a new registration form (Figure 2.6) view. After entering the information click the **Save** button.

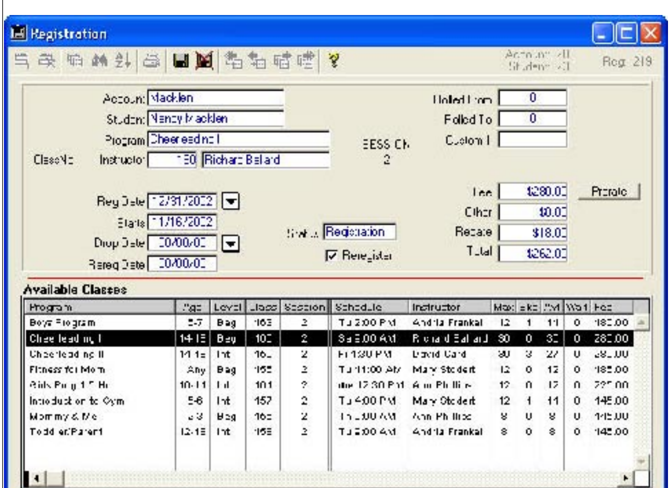


Figure 2.6

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.

Prorating Class Fees

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.

Charging Membership Fees

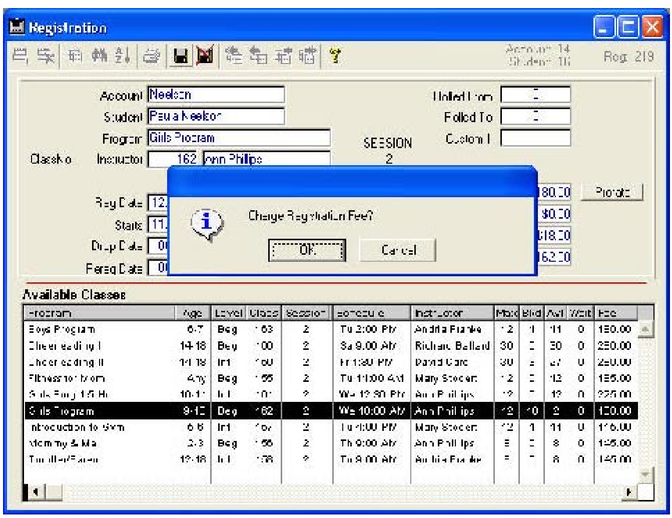


Figure 2.7

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.

Transfering Students:

Moving 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

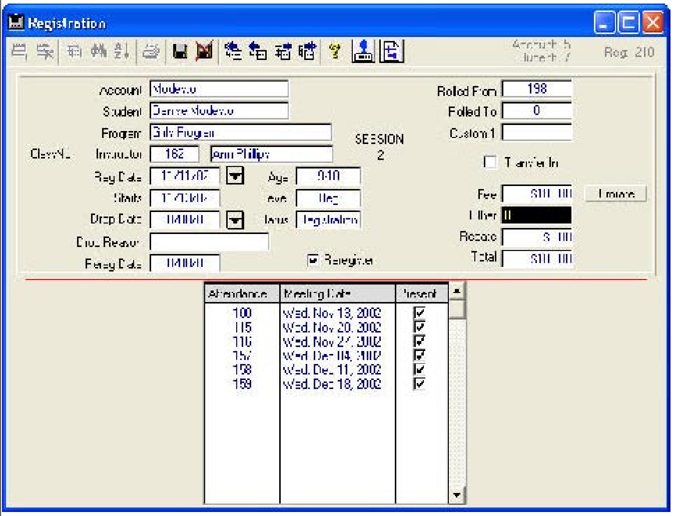
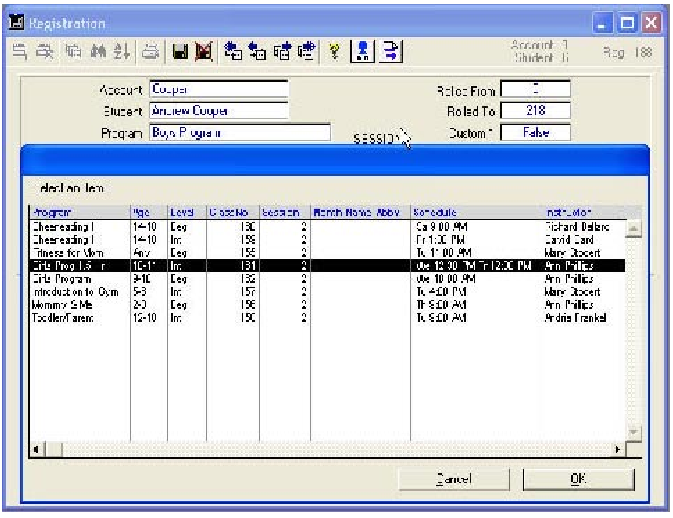


Figure 2.9



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 amout 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.

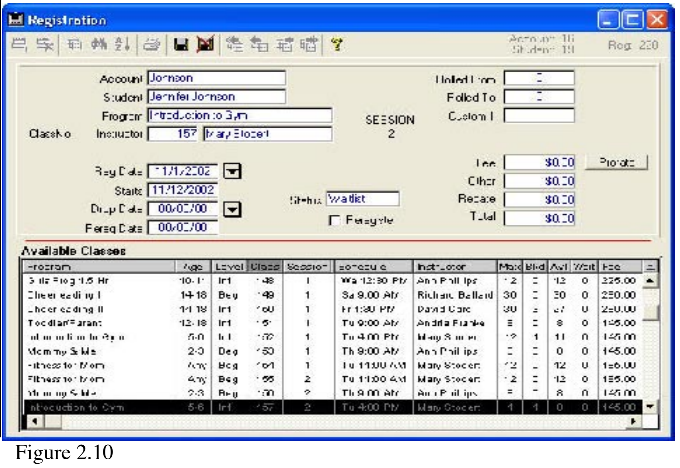


Figure 2.10

Charging For Products Sold:

Selling Products

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)

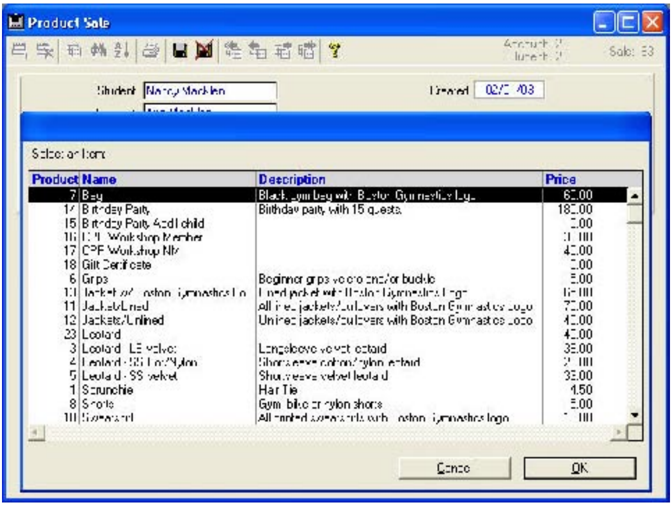


Figure 2.11

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.

Adding instructors:

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).

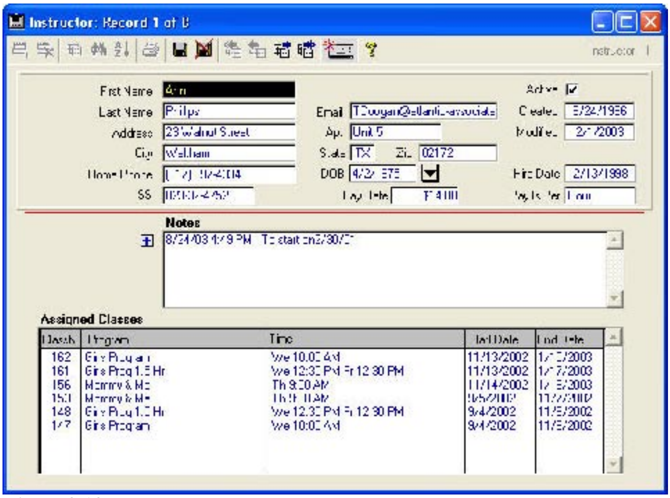


Figure 2.12

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.

Printing Statements:

Billing

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 amd 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).

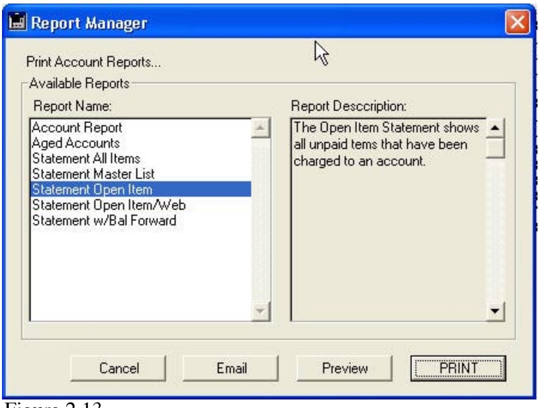


Figure 2.13

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)

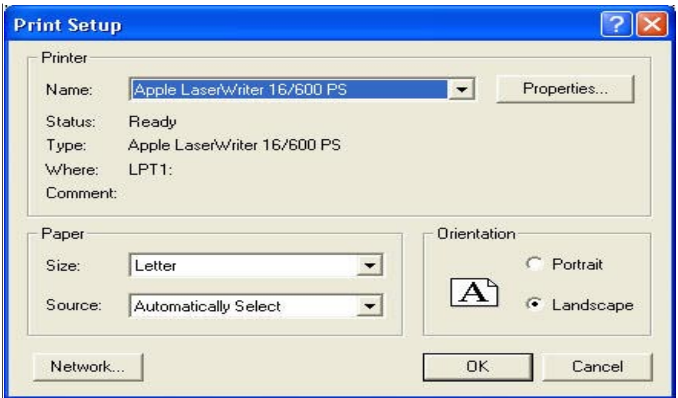


Figure 2.14

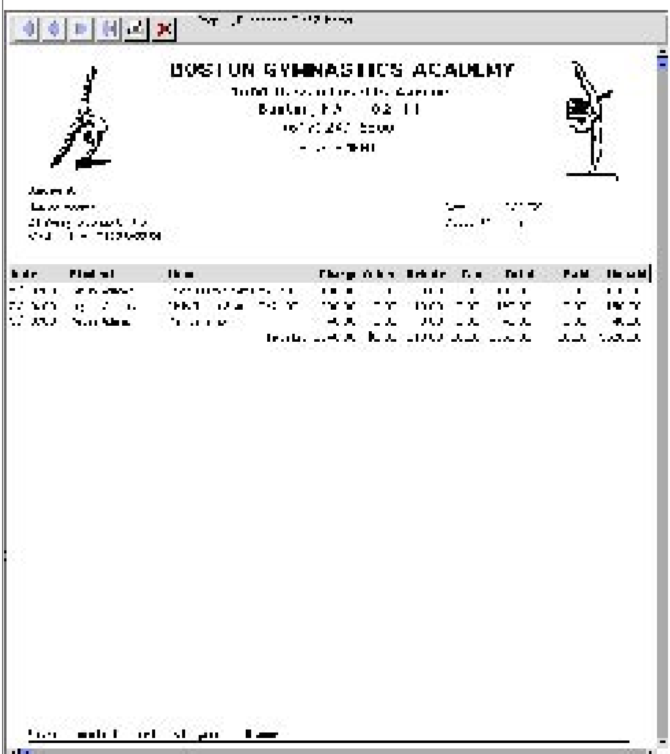


Figure 2.15

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

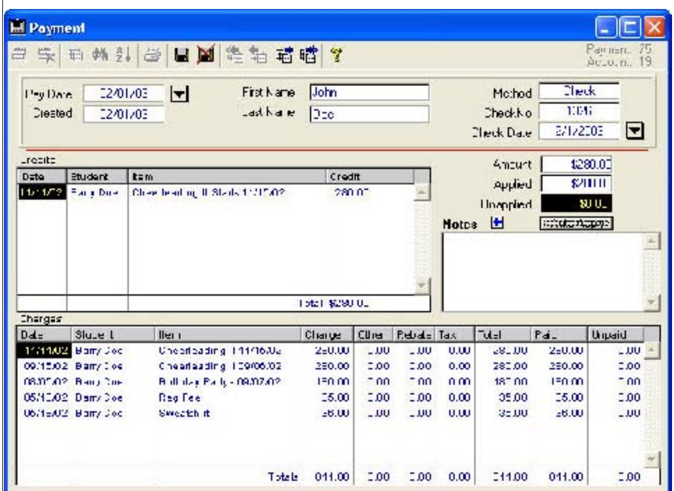


Figure 2.17

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.

Page 1 | **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
67	15	Roberta	Anna	11/11/02	Check	342	07/30/02	412.00
68	14	Neelson	Jennifer	11/11/02	Check	3222	08/25/02	215.00
70	21	Kelley	Arnold	11/11/02	Check	433	08/23/02	316.00
71	6	Donovan	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	08/10/02	220.00
76	10	Doe	John	02/01/03	Check	1326	02/01/03	280.00
						Check	SUBTOTAL	$2,931.50
69	13	Adams	Janice	11/11/02	M/C		08/29/02	215.00
74	2	Pierson	Julie	11/11/02	M/C		08/12/02	215.00
						M/C	SUBTOTAL	$430.00
66	10	Doe	John	11/11/02	VISA		08/20/02	531.00
						VISA	SUBTOTAL	$531.00
							TOTAL	$ 3,892.50

Figure 2.18

Accounts Receivable:

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:

AGED ACCOUNTS BALANCES

Page 1 | 02/02/03

Acct#	Account	Address	City	Phone	Current	31-60	61-90	90-120	121+	Total
13	Adams, Janice	23 Derry Avenue	Weston	(344) 344-0344	0.00	0.00	100.00	0.00	0.00	100.00
1	Cooper, Jane	40 [illegible] Avenue	Worcester	(617) 344-3434	0.00	0.00	0.00	0.00	0.00	0.00
6	Donovan, Becky	400 Third Avenue	Waltham	(617) 233-3333	0.00	0.00	180.00	0.00	0.00	80.00
16	Johnson, Ann	22 Water Road	Sudbury	(603) 256-0645	0.00	0.00	181.00	0.00	(46.00)	135.00
21	Kelley, Arnold	34 Walnut	Sudbury	(973) 435-0500	0.00	0.00	200.00	0.00	0.00	200.00
20	Macklen, Ann	[illegible]	Waltham	(617) 433-3443	0.00	0.00	180.00	0.00	0.00	180.00
5	Modesto, Clair	46 Washington Street	Boston	(617) 344-3437	0.00	0.00	343.00	0.00	0.00	342.00
14	Neelson, Jennifer	64 Cabot Place	Wayland	[illegible]	0.00	162.00	180.00	0.00	0.00	342.00
2	Pierson, Julie	50 Watson Place	Boston	(617) 422-4075	0.00	0.00	100.00	0.00	0.00	100.00
15	Roberta, Anna	[illegible]	Weston	(978) 344-3443	0.00	0.00	342.00	0.00	0.00	342.00
	Total Number: 10				0.00	162.00	2,044.00	0.00	(46.00)	[illegible]

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

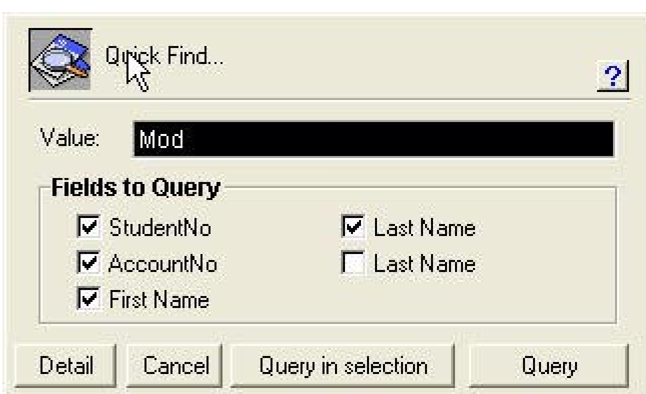


Figure 2.20

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.

Search

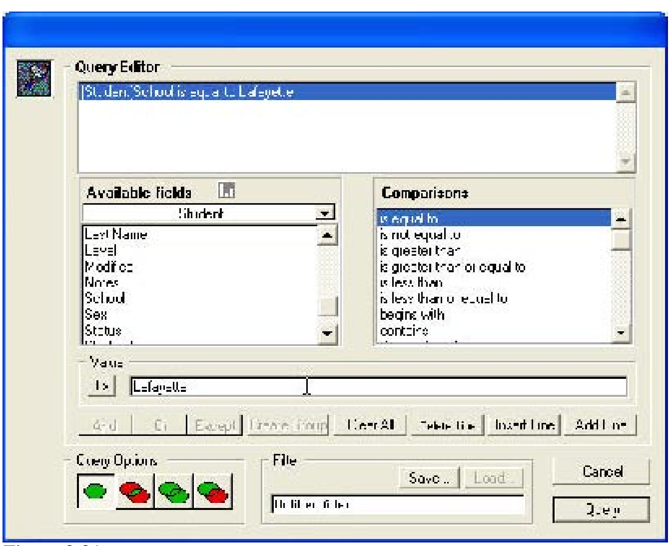
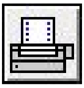


Figure 2.21

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.

Printing

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

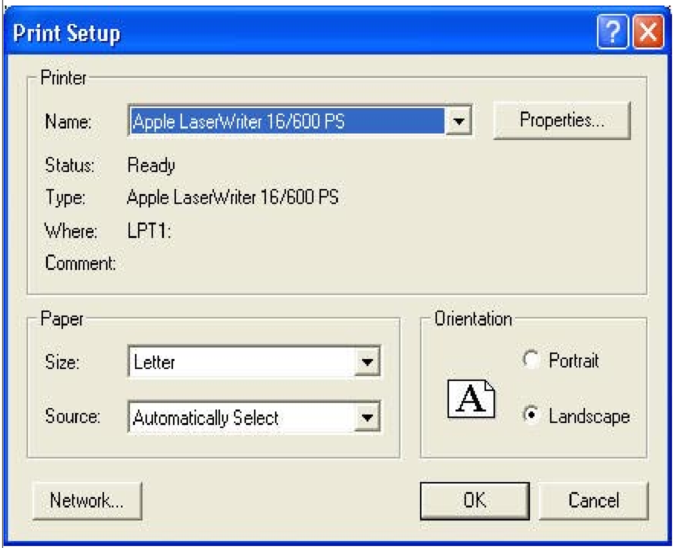
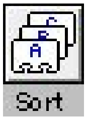


Figure 2.22

To Sort Records:

Sorting



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

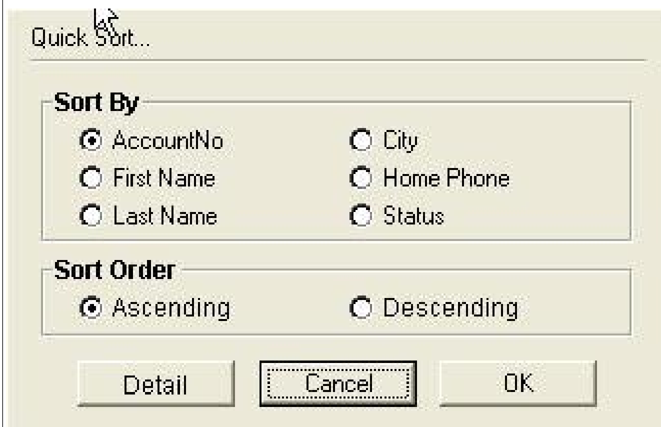


Figure 2.23

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 decending. 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..

Sort

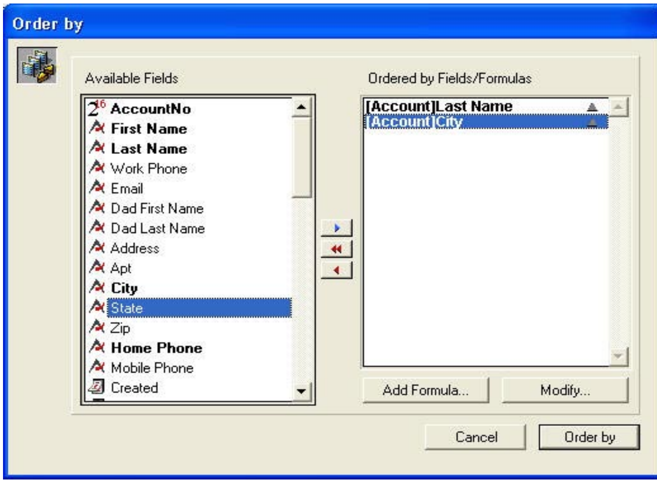


Figure 2.24

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.

Chart

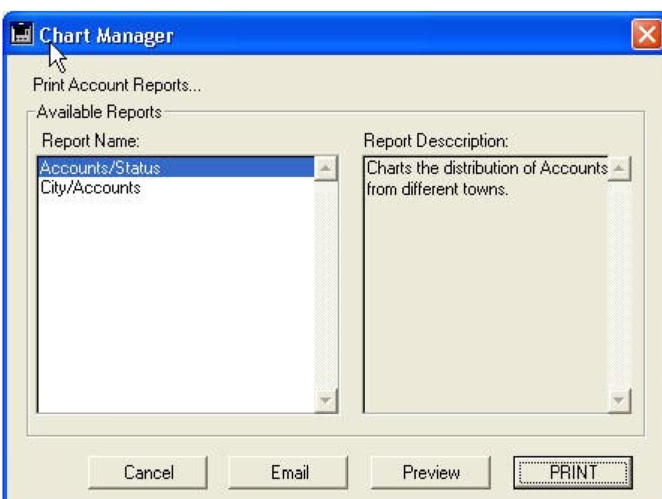


Figure 2.25

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**.

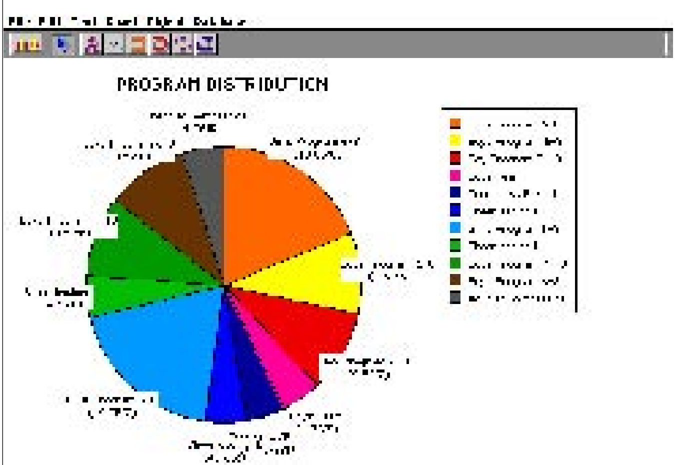


Figure 2.26

5. To create additonal 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 that 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:

Acount 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

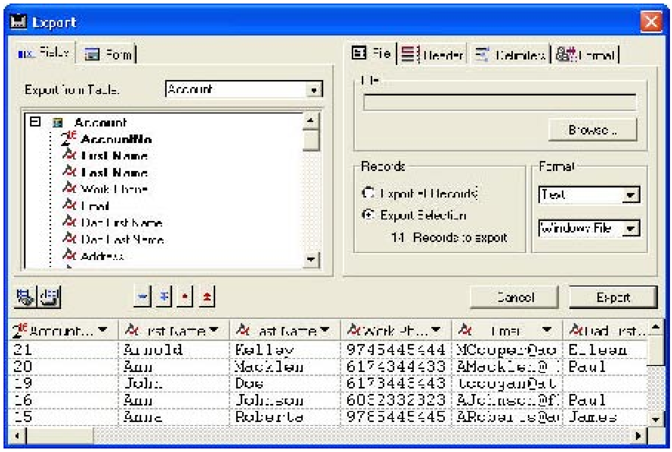


Figure 3.1

Password

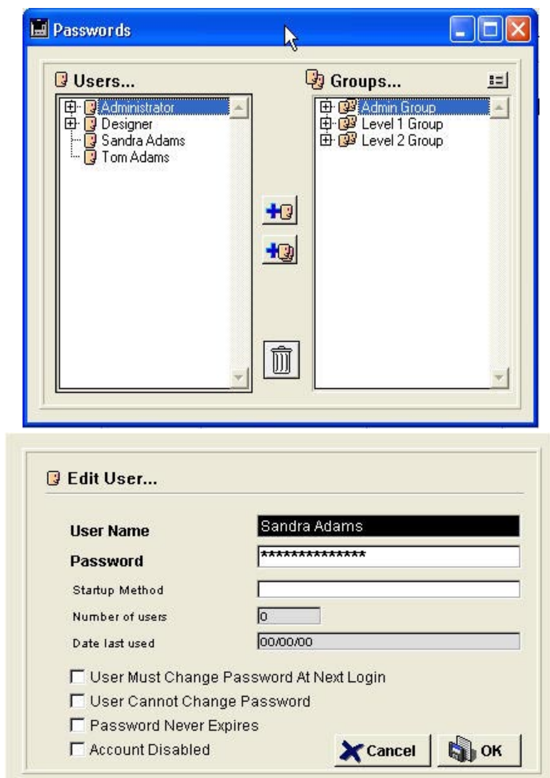
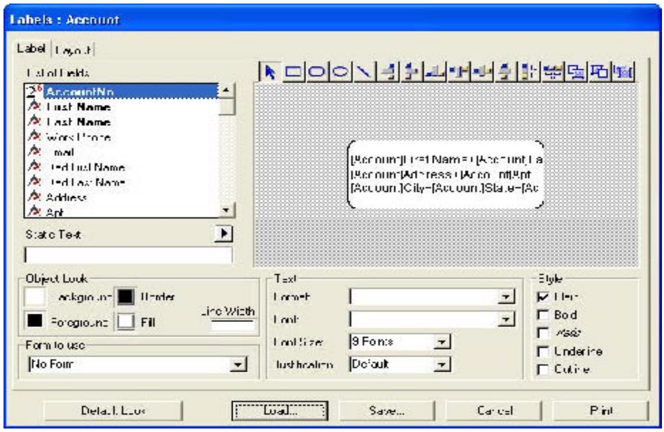


Figure 3.2

Label



Figure

Figure 3.3

SuperReport

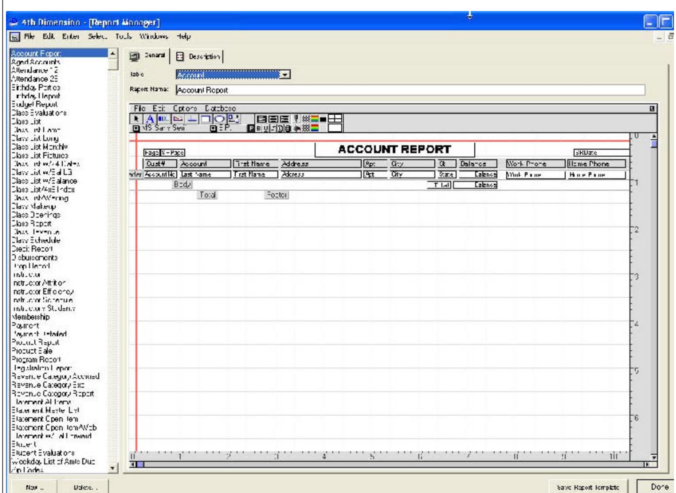


Figure 3.4

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

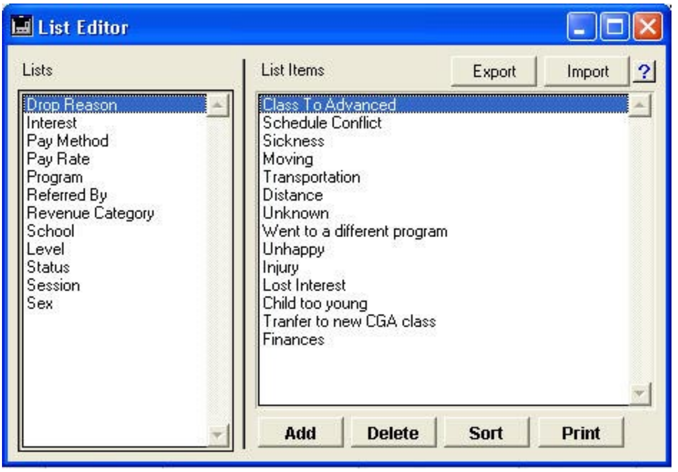


Figure 3.5

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

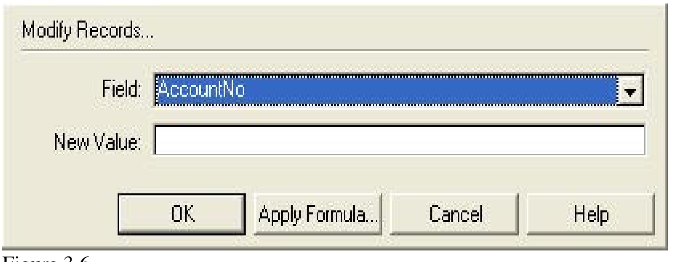


Figure 3.6

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 you 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.

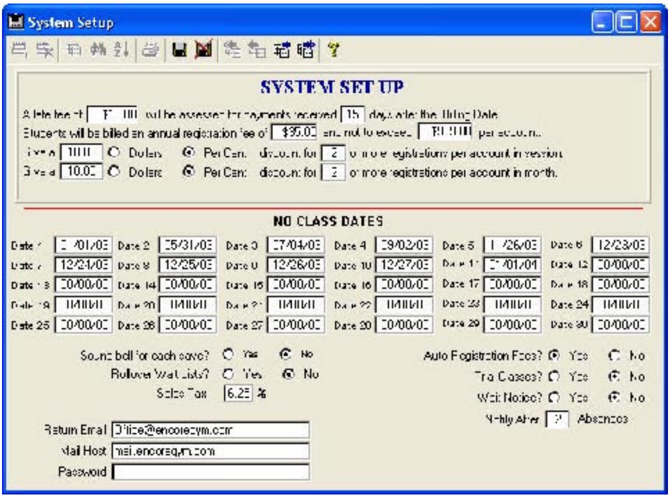


Figure 3.6

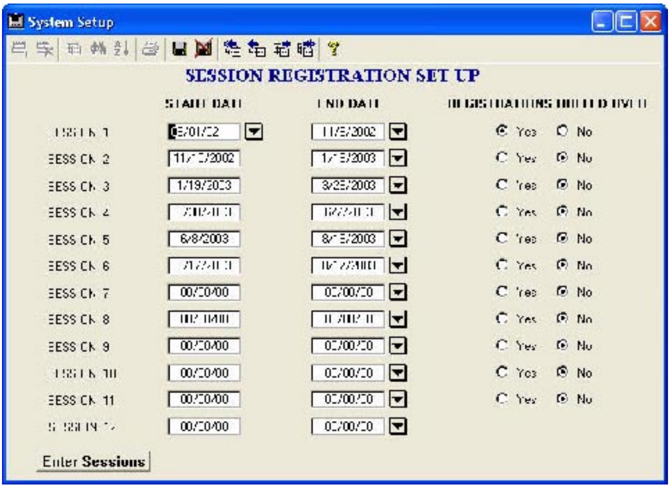


Figure 3.7

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.

Figure 3.8

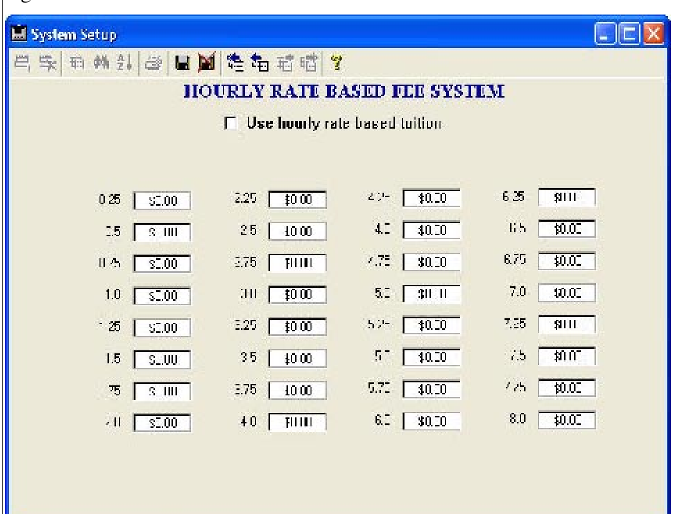


Figure 3.9

Email

Email can be access 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.

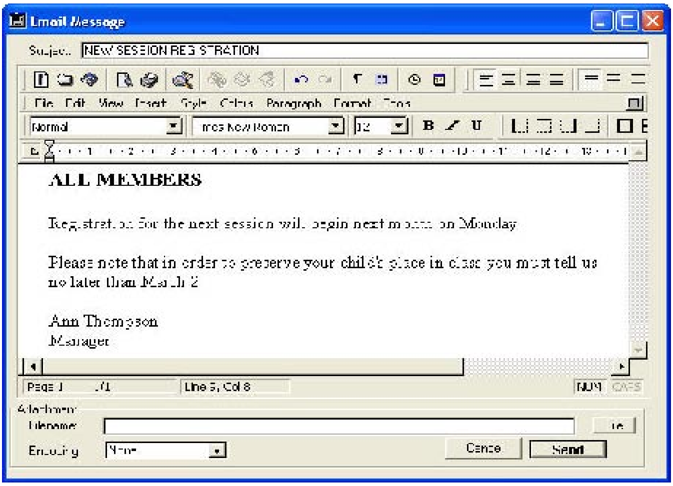
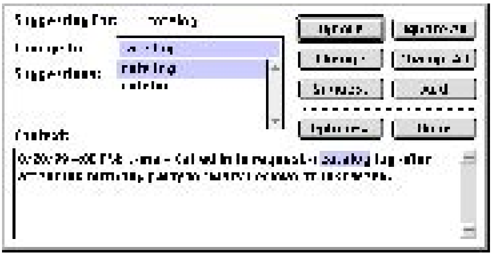


Figure 3.10

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.

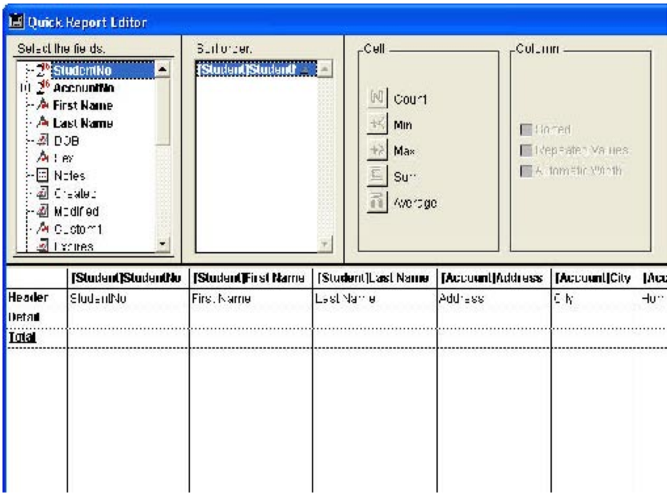
3. Once in the Find dialog click **Detail** to bring up the Query Editor. In the Query Editor click on the **Available fields** Popup and select **Student**. Now click **DOB** is **is greater than or equal** to and enter the value **01/01/90**. Click below on **Add Line** and then enter again **DOB** 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 capabilites 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

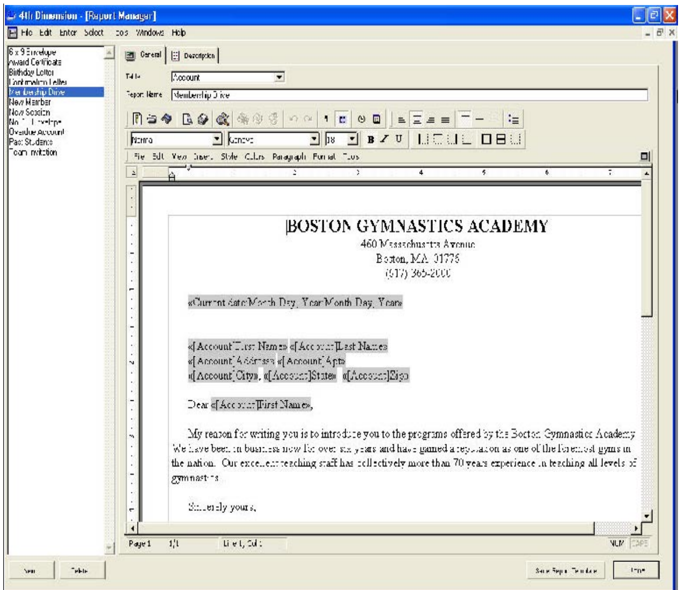


Figure 3.13

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 cion 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.

Import Editor

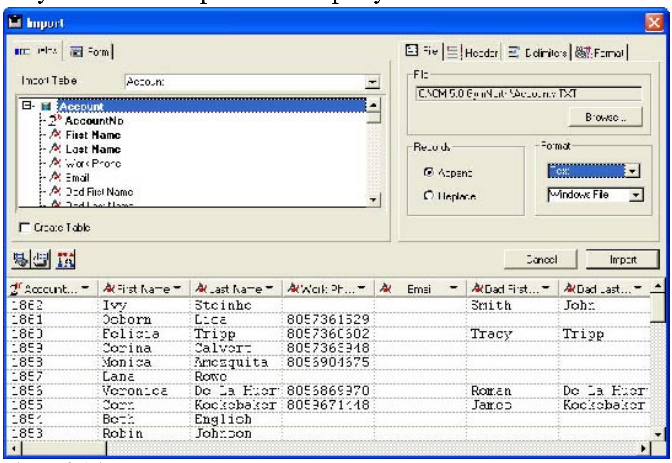


Figure 3.15

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.

Spreadsheet

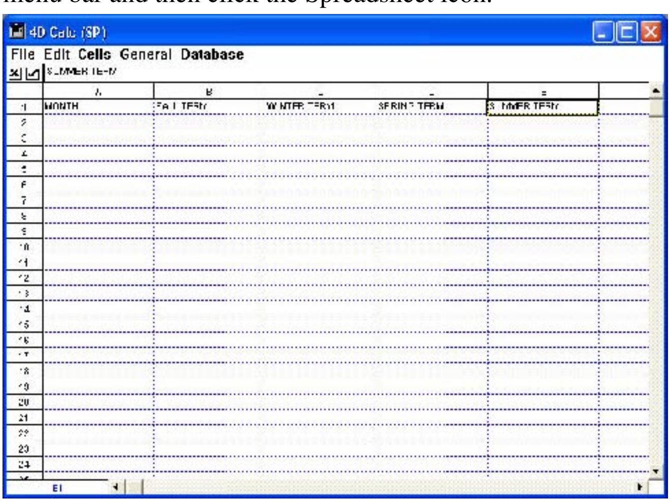


Figure 3.16

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).

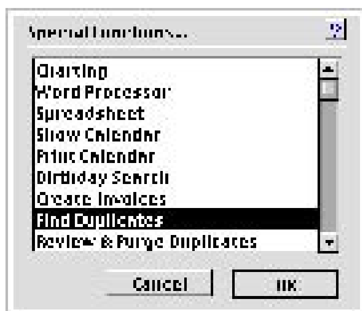


Figure 3.17

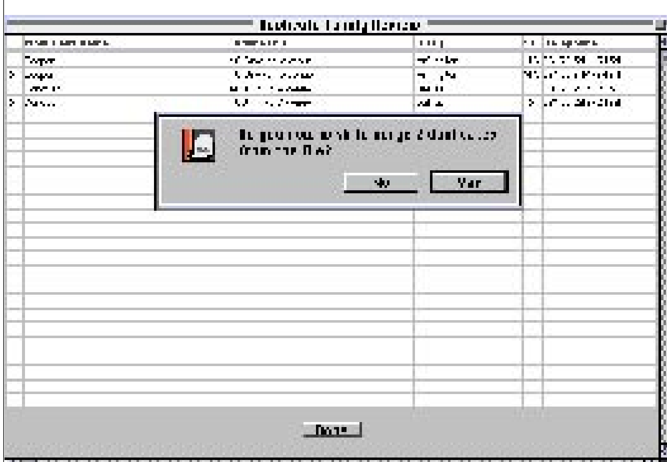
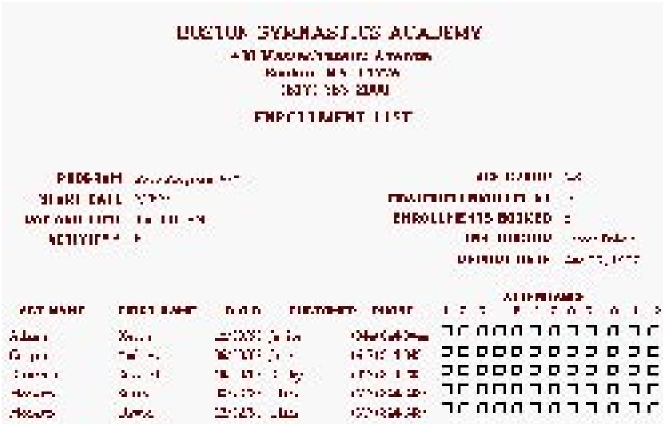
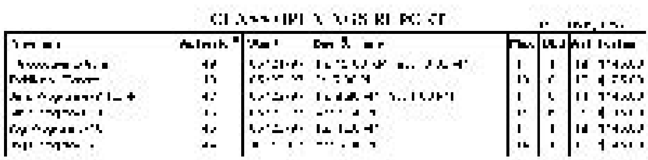
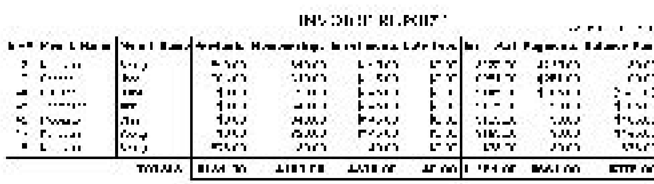


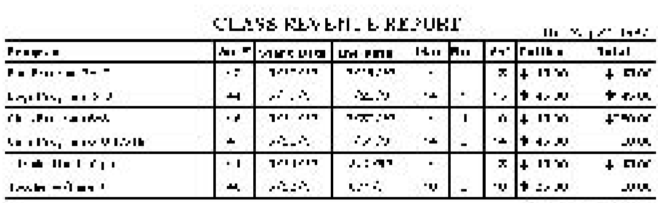
Figure 3.18

EXAMPLE REPORTS









PRODUCT REPORT

[illegible]

PRODUCT SALES REPORT

[illegible]

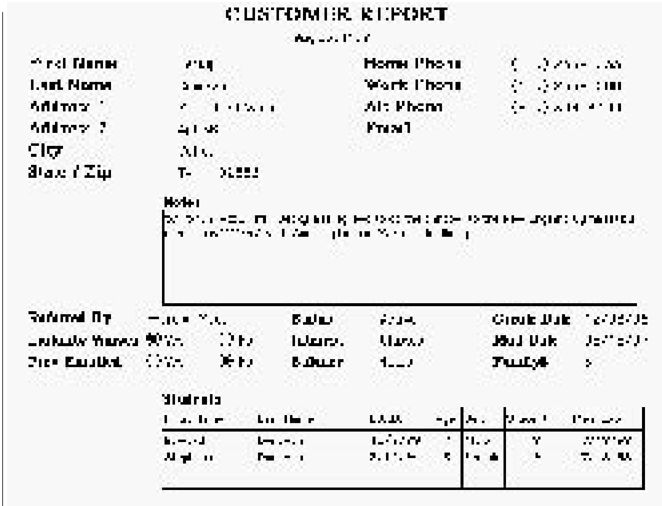
PAYMENT REPORT

[illegible]

TOTAL [illegible]

[illegible] REPORT

[illegible]


CUSTOMER REPORT

Last Name

Address 2

City

State / Zip

Home Phone

Work Phone

Alt Phone

Email

Notes

Referred By

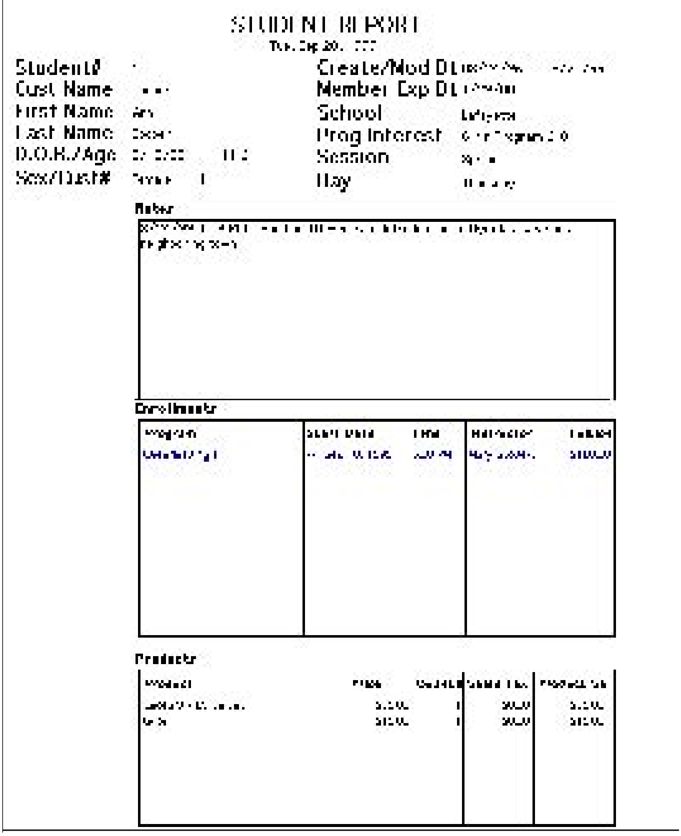
Status

Create Date

Mod Date

Family#

Students


STUDENT REPORT

Student#

Cust Name

First Name

Last Name

D.O.B./Age

Sex/Cust#

Create/Mod Dt

Member Exp Dt

School

Prog Interest

Session

Day

Notes

Enrollments

Products

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

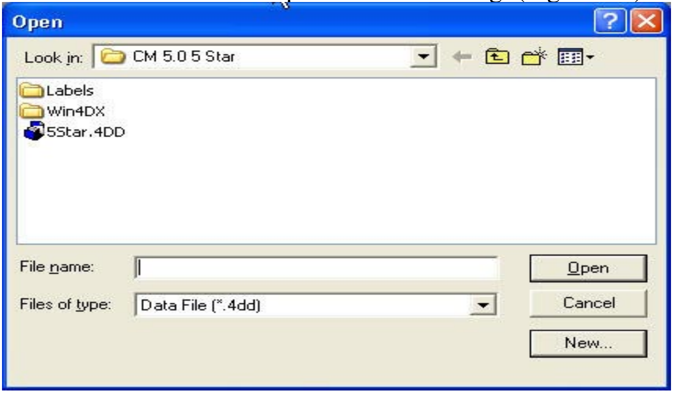


Figure 4.1

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**.

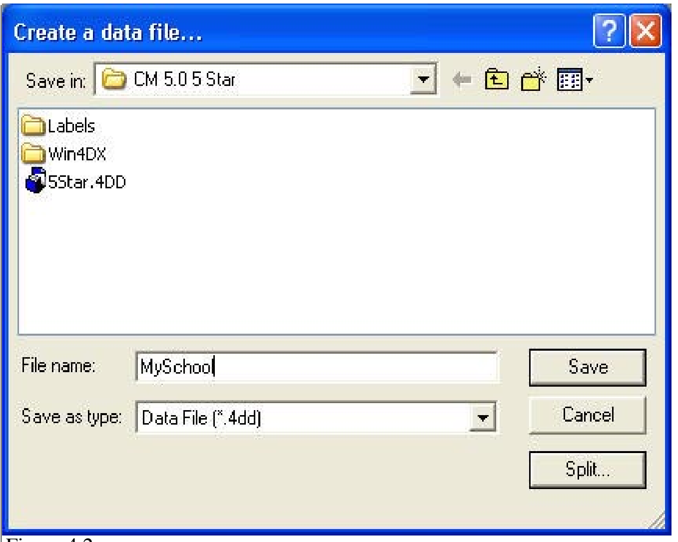


Figure 4.2

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 Schedule[2]

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