Access DesignPro

Dojo Management Systems

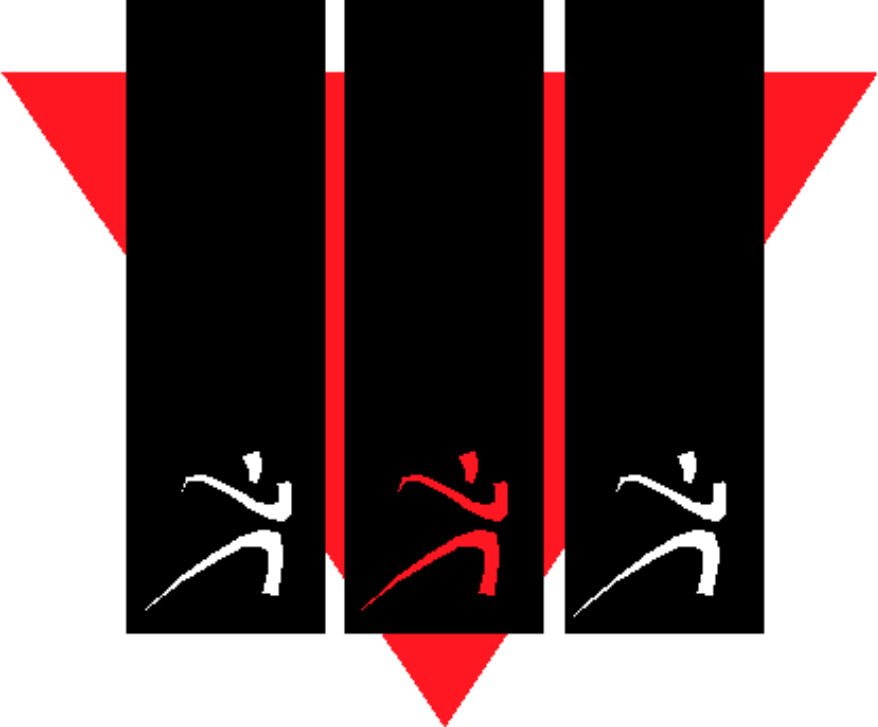# USER MANUAL

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Contents

Thank you for purchasing Dojo Management Systems!   We recommend you read this manual carefully and walk through the implementation guide to assist you with and easy set-up. Following the sequential steps in this guide will assure you of a easy installation and set-up of your software.

Thanks Again !   Development Team

ACCESSING THE DATABASE

Initial Download & Set-Up

▸ Download the .mdb file from our web site using the password e-mailed to you
▸ Under your C-Drive, create a directory and name it "ADP"
▸ Create a Directory called "Backups" in the ADP directory
▸ Copy the downloaded .mdb file to into this directory.
▸ Right click on the file and click - create shortcut.   This will create a shortcut file to the database,
▸ Simply **drag and drop the shortcut file to your desktop**.   Then just click on the desktop icon to access the database.

Dojo Manager
5.0.mdb - Shortcut
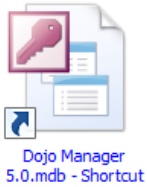
▸ **You may right click on the shortcut, and change the icon to the DMS icon provided in the download. Contact ADP Support Team via our web site for assistance in Set-Up**

Logging On

Once you have copied the shortcut to your desktop, double click on the icon to open the database.

Dojo Manager
5.0.mdb -
Shortcut
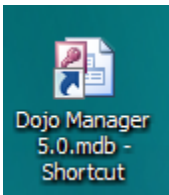
The system will prompt you for your user name and password. Enter the following info to sign in:

User Name :   admin
Password: password123

Enter you user name and password when prompted, and then click "Submit".

You can assign yourself another password once you have logged in as administrator. If you forget your password or user name, just contact the ADP Support Team to help you reset your password.

MAIN MENU

This will open the system Main Menu:

Martial Arts Studio Manager Software	EXIT — Sign-in User Information and department
STUDENT MENU UTILITIES MENU	CURRENT USER: cdacev
FINANCIAL MENU NEW MESSAGE / TO DO	DEPARTMENT: PBO Admin — MAIN MENU OPTIONS
REPORTS MENU BACK UP CORE FILES	10-Mar-12

MESSAGES

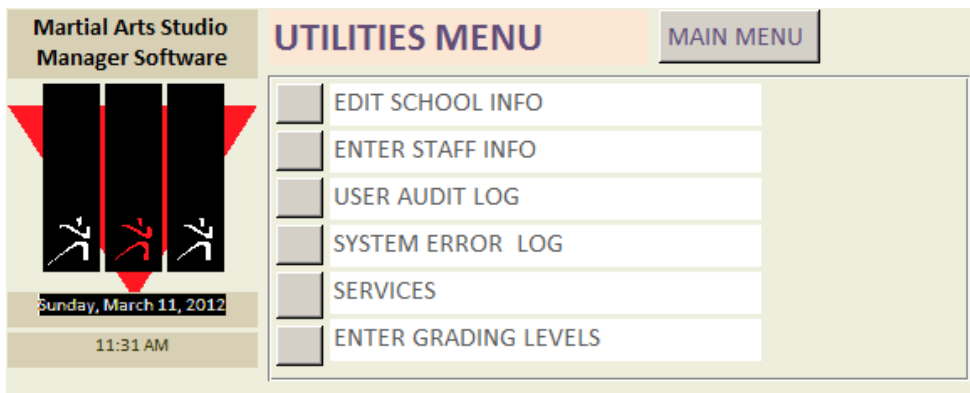| DATE SENT	MESSAGE PREVIEW	FROM	
3/10/2012	*Please contact student regarding testing next*	James Smith	VIEW
2/13/2012	*Needs call back on karate for two sons. Ages*	Kristen Sheldon	VIEW — MY MESSAGE CENTER

FINANCIAL DASHBOARD — Financial Dashboard

BALANCE SHEET ACCOUNTS		ACCOUNTS RECEIVABLE		ACTIVE STUDENT DUES
Webster Bank	$470.09	MONTHLY DUES	$1,000.00	**Active Student Dues** $605.00
PayPal	$0.00	UNIFORM	$36.00	
	($1,500.00)	Equipment	$32.00	
		Tournament Fees	$10.00	

The main menu displays the current logged-in user information, menu options, messages addressed to the logged-in user, and a financial summary dashboard.   The financial dashboard summarizes your balance sheet accounts, current accounts receivables, you monthly active student dues. Messages that display have been sent to the current logged-in user.

The first step in using the system is set-up your system support file information. Use the utilities menu to enter information on your school and to set-up users to access the system.

UTILITIES SET-UP

From the Main Menu, Click on the **Utilities Menu** to access the system set-up screens

School Information Set-Up

Click on the **ENTER SCHOOL INFO** button to enter information on you school:

Tab through each field and enter your school's contact information.   Many of these fields will appear on your billing statements to students.

Special Fields :

Billing Statement 1&2 : This field is used to display custom messages on your billing statements. You can use to reference

School Logo: This field is used to include a school logo on your billing statements (right click, insert object)

Staff / User Set-Up

Once you have set-up your school information, you will need to set-up users in the system. Click on the **ENTER STAFF INFO** button on the Utilities Menu.

Use the **NEW** button to add a new user to the system. Tab through each field and enter the user information. Use the arrow keys to browse through the list of staff / users and edit their information.

Special Fields :

User Name & Password: This will be the user name and password that the staff member uses to open the database. The user name is also used to receive and send messages to other users on the system.

Access level: This determines which areas of the system a user has access to. As example, only users with access level 10 can view the UTILITIES menu.

Click **SAVE** to save your Changes.

Services Set-Up

From the Utilities Menu click on the **SERVICES** menu. This screen will allow you to enter the various services and products you offer to you students. Use the **NEW** button to enter new services and products.

SERVICES   NEW ◄ ► EXIT SAVE

ID	SERVICE TYPE
1	MONTHLY DUES
2	UNIFORM
3	MONTHLY DUES: FAMILY ACCOUNT
4	WEEKLY CLUB FEE
5	QUARTERLY DUES
6	TESTING FEE
7	PATCH
8	SEMINAR
9	SINGLE CLASS
10	Equipment
11	Tournament Fees

Click **SAVE** to save your Changes.

Grading levels Set-Up

Click the ENTER GRADING LEVELS button to enter your dojo's grading levels.

GRADING LEVEL   NEW SAVE EXIT

GRADE LEVEL	GRADE DESCRIPTION
10th Kyu	White Belt
1st Kyu	Brown Belt
2nd Kyu	Brown Belt
3rd Kyu	Brown Belt
4th Kyu	Purple Belt
5th Kyu	Purple Belt
6th Kyu	Green Belt
7th Kyu	Green Belt
8th Kyu	Orange Belt
9th Kyu	Yellow Belt
Godan	5th Degree Black Belt
Shodan Ho	Probationary Black Belt
Nidan	2nd Degree Black Belt
Rokudan	6th Degree Black Belt
Sandan	3rd Degree Black Belt
Shodan	1st Degree Black Belt
Yondan	4th Degree Black Belt

Student Menu

From the Main Menu, click on the "**Student Menu**" button.   The system will open the Student Menu screen:
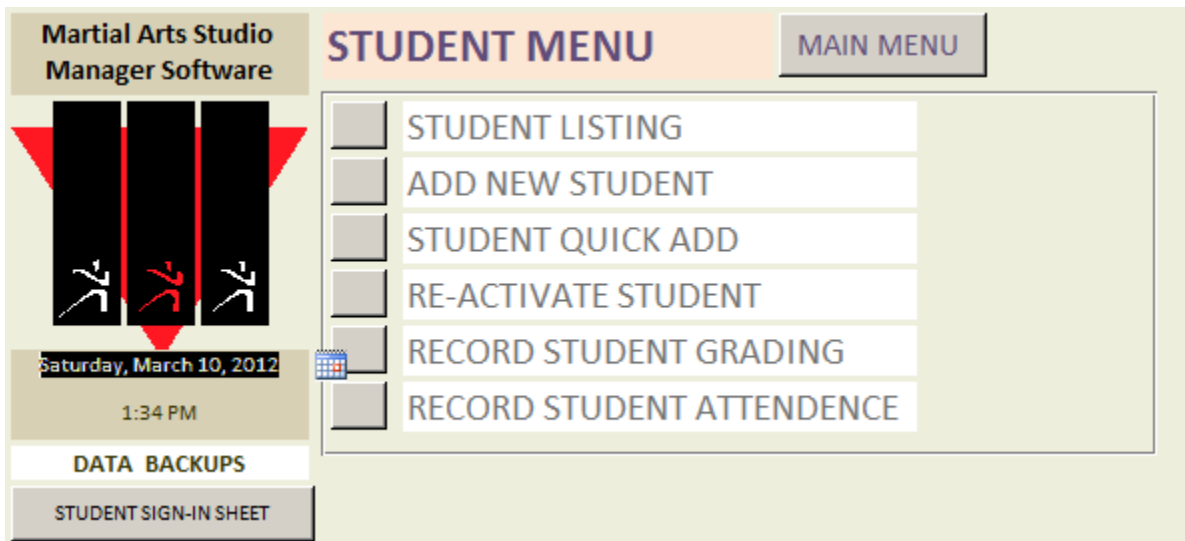
You have several options on this menu, which include Opening the list of existing students, adding a new student account, or using the student quick add feature. You can also re-activate old students from this screen, and record student grading and attendance.

Student Listing
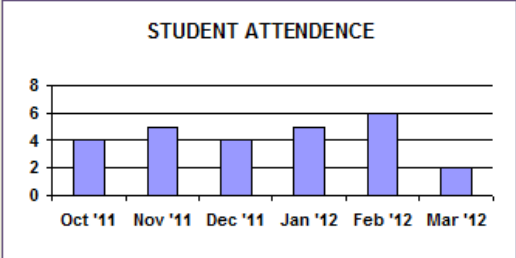
Selecting the student listing will display a listing of active students enrolled at your studio. You can use the search button to search on the student's last name.

STUDENT LISTING   SEARCH   jackson   EX

Family	FIRST	LAST	DOB	STATUS	DUES	GRADE LEVEL:
VIEW ☐	Kathy	Jackson	1/9/2004	ACTIVE	$45.00	9th Kyu
VIEW ☐	William	Smith	9/19/2003	ACTIVE	$0.00	6th Kyu
VIEW ☐	Morgan	Smith	12/16/2000	ACTIVE	$0.00	4th Kyu
VIEW ☐	Mark	Smith	7/21/1975	ACTIVE	$0.00	Kare Shodan
VIEW ☐	Carol	Johnson	3/17/1972	ACTIVE	$45.00	2nd Kyu
VIEW ☐	Connor	Doe	7/30/1994	ACTIVE	$0.00	Shodan
VIEW ☐	Madison	Doe	8/10/1999	ACTIVE	$0.00	1st Kyu
VIEW ☐	John	Doe	1/19/1978	ACTIVE	$0.00	3rd Kyu
VIEW ☑	Jackson	Family		ACTIVE	$95.00	3rd Kyu

To view a student's profile screen, click on the **VIEW** button to the left of the student's name.

This screen displays contact information on the student along with information on their attendance, grading history, dues payment history, and other family members tied to the account. The screen has several tabs to view more detail information on the student:

Charges Tab :   Record student monthly charges

CHARGES	FIN. HISTORY	GRADING RECORDS	ATTENDENCE	FAMILY MEMBERS

DATE	CHARGE	SERVICE	MONTH OF:	MEMO	NEW CHARGE SAVE
1/15/2012	$20.00	Equipment		Bo Staff	455
1/1/2012	$45.00	MONTHLY DUES	JAN 2012		454
12/1/2011	$45.00	MONTHLY DUES	DEC 2011		452
11/1/2011	$25.00	UNIFORM			453
11/1/2011	$45.00	MONTHLY DUES	NOV 2011		451

Financial Tab: Record charges and payment history on student

DATE	INVOICE #	CHARGE	MONTH OF	PMT_AMT	PMT_TYPE	CHECK #	PMT_DATE	INVOICE BAl		
1/15/2012	455	$20.00		$20.00	CHECK	1253	1/30/2012	$0.00	PAY	SAVE
1/1/2012	454	$45.00	JAN 2012	$30.00	CASH			$15.00	PAY	SAVE
12/1/2011	452	$45.00	DEC 2011	$45.00	CASH		12/10/2011	$0.00	PAY	SAVE
11/1/2011	453	$25.00		$25.00	CASH		11/10/2011	$0.00	PAY	SAVE
11/1/2011	451	$45.00	NOV 2011	$45.00	CHECK	801	11/1/2011	$0.00	PAY	SAVE

Grading Tab: Record Student promotions

DATE	RANKING	CERTIFICATE #	CHIEF EXAMINER:	Student	NEW	SAVE
1/15/2012	1st Kyu	RISCK13244	Christopher Dacey	John Doe		
6/10/2011	2nd Kyu	RISK12100	Christopher Dacey	John Doe		
12/9/2009	3rd Kyu	risk100120	Christopher Dacey	John Doe		
3/10/2012						

Attendance: Record Student attendance history

DATE	TIME	# CLASSES		RECORD STUDENT ATTENDENCE	ACCOUNT	
3/10/2012	1:56 PM	1	ATTENDED CLASS	☑	199	
3/5/2012	1:56 PM	1	ATTENDED CLASS	☑	199	
2/11/2012	4:27 PM	1	ATTENDED CLASS	☑	199	
2/5/2012	1:02 PM	1	ATTENDED CLASS	☑	199	
2/5/2012	12:30 PM	1	ATTENDED CLASS	☑	199	
2/4/2012	6:54 PM	1	ATTENDED CLASS	☑	199	

Family Members: Record all family members under this account.

Family Member	DOB	SEX	BELT LEVEL	Notes	
Susan Doe	05/21/1988	F	3rd Kyu		
James Doe	01/25/1999	M	5th Kyu	Has Asthma	
John Doe	01/19/1978	M	6th Kyu		

ADD NEW STUDENT

From the Student Menu, click the ADD NEW STUDENT option to open the full student set-up screen. This screen should be used when you have complete information on a student. Simply tab through each field and enter the student's information. Note : You should complete the basic **Utilities Set-Up** prior to adding new students in order to have appropriate values populate in the drop-down menus

Special Fields :

- Family Account Check Box: Check this box if you use family accounts, and will enter more than one student under a single account / billing statement.
- Student Photo Link: Right-click on this hyper-link field, click hyperlink, and then edit hyperlink. Browse to the image file of the student and select. If you share this database over a network, images must be stored on a shared drive for all users to view.

STUDENT RECORD SHEET

ACCOUNT #	STUDENT FIRST	STUDENT LAST	DOB	AGE	SAVE	DELETE	BALANCE	# STUDENTS
200	James	Doe			EXIT	NEW		1

ADDRESS | CITY | STATE | PARENT OR GUARDIAN

☐ Family Account

ZIP | TELEPHONE | CELL

REFERRED BY :

MEDICAL CONDITIONS | STATUS: ACTIVE | EMAIL:

STUDENT STATUS: ACTIVE

PREVIOUS TRAINING YRS 0 | PREVIOUS INSTRUCTOR | PREVIOUS RANK | BELT SIZE

LAST TESTING DATE

BEGIN DATE | TODAY | AFFLIATION | MONTHLY DUES $0.00 | SCHOOL 1

RESPONSIBLE PARTY:

STUDENT NAME

INSTRUCTOR NOTES

MTH ACTIVE: | MTH INACTIVE:

PRESENT GRADING:

StudentPhotoLink:

CHARGES	FIN. HISTORY	GRADING RECORDS	ATTENDENCE	FAMILY MEMBERS

DATE	CHARGE	SERVICE	MONTH OF:	MEMO	NEW CHARGE	SAVE
3/10/2012	$0.00				(New)	

STUDENT QUICK ADD

There are instances when you don't have enough time or information to complete a full student registration, but you can use the **Student Quick Add** option to add basic information on a student.

Simply tab through the fields and enter the student's basic contact information. This is a good tool if you are registering a student over the telephone.

STUDENT GRADING

You can enter student promotional records from the Grading Tab on the student summary screen, or from the grading screen. To enter student grading and promotions click on the **RECORD STUDENT GRADING** button on the Student Menu. Search on the student by last name, and hit the enter key to display that students grading records. Click the **NEW** button to add a new promotional record and tab through the fields to enter the data. When complete, click the **SAVE** button.

You can then search on another student to add their records.

STUDENT ATTENDENCE

Click on the **RECORD STUDENT ATTENDENCE** button on the Student Menu. Search on the student you wish to record attendance on. Once you have the student displayed on the screen, simply click the **RECORD ATTENDENCE** button. The system will record attendance for the active student and post today's date. If you are entering attendance for students for a prior date, you simply need to change the "date of class" field prior to clicking the record attendance button.

STUDENT SIGN-IN SHEET

SEARCH	Doe, John ▾		EXIT
STUDENT #	STUDENT		
199	Doe, John		SAVE

DATE OF CLASS: 3/11/2012   RECORD ATTENDENCE

DATE	TIME	# CLASSES		ACCOUNT#
2/11/2012	4:27 PM	1	ATTENDED CLASS ☑	199 ▾
2/5/2012	1:02 PM	1	ATTENDED CLASS ☑	199 ▾
2/5/2012	12:30 PM	1	ATTENDED CLASS ☑	199 ▾
2/4/2012	6:54 PM	1	ATTENDED CLASS ☑	199 ▾
2/4/2012	6:54 PM	1	ATTENDED CLASS ☑	199 ▾

NOTE :   The Drop Down SEARCH field will only display Active students (reactivate a student record if needed)

FINANCIAL MENU

Dojo Management Systems allows you to track financial information on your studio and provides the following financial functions:

- Student Charge-Entry
- Student Account Payment Posting
- Print Monthly Billing Statements
- Record Bank Account Transactions
- Assist with Bank Account Reconciliation
- Financial Transaction Reporting

To access program features for financial functions, click on the **FINANCIAL MENU** button from the Main Menu.   This will open the Financial Menu Screen.
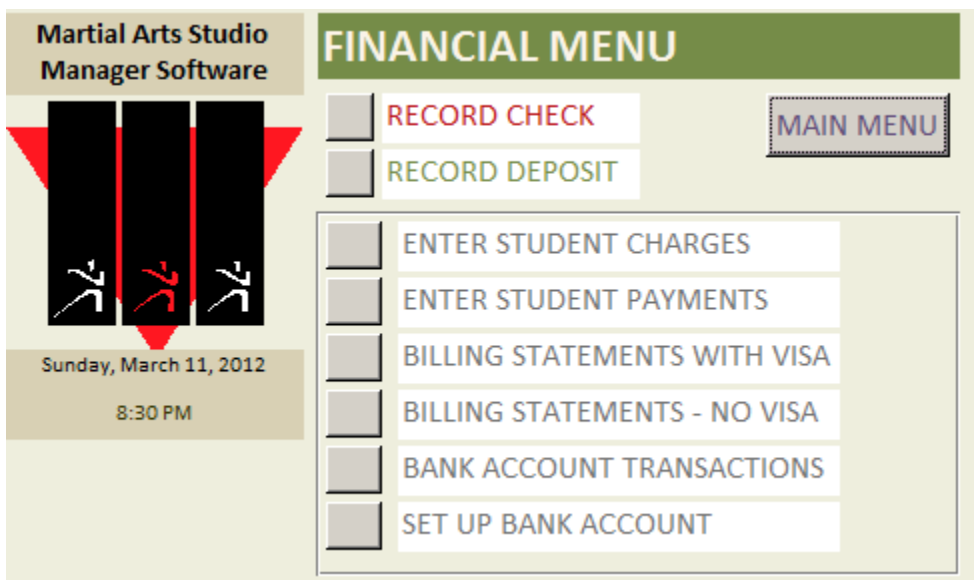
Charge-Entry

Click on the **ENTER STUDENT CHARGES** button on the Financial Menu.   This opens the charge-entry screen. The first step is to search for the student using the search drop-down field. Select a student, and then click on the **NEW CHARGE** button on the screen to enter a new charge.   Tab through each field and enter the appropriate information. The header for the selected student will display the student's monthly dues fee amount.   You can also enter charges for other services and equipment such as seminars, uniforms, or other equipment. You can set up any service you provide under the Utilities Menu.

CHARGE ENTRY SCREEN

STUDENT SEARCH: Doe, John

	ACCOUNT	STUDENT	STATUS:	ACTIVE
	199	Doe, John	MONTHLY DUES:	$45.00

EXIT NEW CHARGE SAVE

	DATE	CHARGE	SERVICE	MONTH OF:	MEMO
▶	3/11/2012	$45.00	MONTHLY DUES	MAR 2012	
	1/15/2012	$20.00	Equipment		Bo Staff
	1/1/2012	$45.00	MONTHLY DUES	JAN 2012	
	12/1/2011	$45.00	MONTHLY DUES	DEC 2011	
	11/1/2011	$25.00	UNIFORM		Ne Gi
	11/1/2011	$45.00	MONTHLY DUES	NOV 2011	
*	3/11/2012	$0.00			

Billing Statements

Once you have entered charges, you can print billing statements that can be mailed out to each student. To print statements click on one of the BILLING STATEMENTS buttons from the Financial Menu (with Credit Card Coupon or without). Statements reflect unpaid charges.

STUDENT MONTHLY STATEMENT

Coventry Shotokan Karate Club

Doe, John

12 Doe Street

Providence   RI   02906

ACCOUNT #
199

DATE	INVOICE #	CHARGE	MONTH OF	PAYMENT	PAYMENT DATE	INVOICE BAL	TYPE
1/1/2012	454	$45.00	JAN 2012	$0.00		$45.00	
	MONTHLY DUES						
1/15/2012	455	$20.00		$0.00		$20.00	
	Equipment			Bo Staff			
3/11/2012	457	$45.00	MAR 2012	$0.00		$45.00	
	MONTHLY DUES						
ACCOUNT TOTALS		**$110.00**		**$0.00**		**ACCOUNT BALANCE :**	**$110.00**

Please Remit Payment to :   **Coventry Shotokan Karate Club**

NOTE : Keep in mind that you have the ability to set-up two custom messages that will appear on every billing statement. This can be done under the School Set-Up in the Utilities Menu.

Posting Payments

Once you have entered charges and sent out billing statements, you will need the ability to post payments to your student accounts.   You can do this easily from the Financial Tab in the Student Summary screen, or from the Payment Posting screen under the Financial Menu. To open the Payment Posting screen, click on the **ENTER STUDENT PAYMENTS** button on the Financial Menu.

The screen will display paid and unpaid charges on a student.   Enter payment information on each charge line item. You can also specify payment type, check number, and payment date. These payments will be applied to a student's account.

Bank Account Transactions

The system allows you to enter transactions on any number of bank accounts that you may have. You can post deposits and withdrawals (checks & ATMs), and the system will track each account balance.   To enter bank transactions click the **BANK ACCOUNT TRANSACTION** button on the Financial Menu.   This will open the bank transactions screen (shown below). Click the new button to post a new transaction.

Special Fields :

Debits: Withdrawals (Checks and ATM's)

Credits: Deposits

Note: Each transaction should have either a debit or a credit $ amount filled in.

BANK TRANSACTIONS

BANK NAME   Account Number

Webster Bank   [redacted]   ◀ ▶   EXIT

TRANSACTIONS

DATE	DESCRIPTION	DEBIT (Check) $AMT	CREDIT (Deposit) $AMT	NEW		
1/31/2012	DEPOSIT	$0.00	$50.00			☑ BankCheck
Trans Type:	Student Dues Revenue ▾ Check #		MEMO			
1/31/2012	Loan	$0.00	$86.95			☑ BankCheck
Trans Type:	Loan - Christopher Da ▾ Check #		MEMO			
1/31/2012	Bank Service Fee	$9.95	$0.00			☑ BankCheck
Trans Type:	Bank Fee ▾ Check #		MEMO			
1/17/2012	Transfer Paypal	$0.00	$86.78			☑ BankCheck
Trans Type:	Student Dues Revenue ▾ Check #		MEMO			
1/13/2012	Ninja World	$46.00	$0.00			☑ BankCheck
Trans Type:	Equipment Expense ▾ Check #		MEMO			

Record: ◀ ◀ 1 of 234 ▶ ▶ ▶ⁱ   No Filter   Search

BANK RECONCILATION - LAST 12 MTHS DEPOSITS		BANK RECONCILATION - LAST 12 MTHS CHECKS	
Account	Webster Bank ▾	Account	Webster Bank ▾
Jan	$842.62	Jan	$95.95
Feb		Feb	
Mar	$412.00	Mar	$134.45
Apr	$421.27	Apr	$598.78
May	$587.38	May	$601.70
Jun	$382.38	Jun	$459.95
Jul	$618.37	Jul	$517.59
Aug	$376.78	Aug	$459.95
Sep	$378.39	Sep	$561.45
Oct	$698.39	Oct	$530.20
Nov	$503.87	Nov	$459.95
Dec	$362.85	Dec	$949.95
Total of Deposits	**$5,584.30**	Total of Checks	$5,369.92

The screen displays all transactions on the account in descending date order.   The lower section of the screen displays a summary of deposits and withdrawals by month to assist with bank balancing.

Financial Summary Report

You can run a financial summary report for a specified period from the Reports Menu Screen.

Bank Transaction Summary

TransType	CREDITS (INCOME)	DEBITS (EXPENSES)	
	$177.00	$177.00	(6 detail records)
Bank Fee	$0.00	$165.65	(18 detail records)
Equipment Expense	$0.00	$109.25	(4 detail records)
Loan - Christopher Dacey	$1,553.90	$1,554.58	(23 detail records)
Materials Expense	$0.00	$139.37	(5 detail records)
Rent Expense	$0.00	$5,400.00	(12 detail records)
Seminar Expense	$0.00	$82.75	(1 detail record)
Student Dues Revenue	$5,629.21	$0.00	(64 detail records)
Grand Total	$7,360.11	$7,628.60	

Sunday, March 11, 2012   Page 1 of 1

Reports Menu

The system comes with a handful of useful reports that you can use to better run you dojo. To access the Report Menu, click the **REPORTS** option from the Main Menu.

Martial Arts Studio Manager Software

REPORTS MENU   MAIN MENU

ACTIVE STUDENT RANKING LIST	ACTIVE STUDENT LABELS
ACTIVE STUDENT DUES REPORT	INACTIVE STUDENT LABELS
PRINT BILLING STATEMENTS	INACTIVE STUDENT RPT
NEW STUDENTS BY MONTH (1)	STUDENT ID CARDS
COLLECTIONS REPORT	MAILING LIST LABELS
STUDENT CONTACT LIST	BANK TRANSACTIONS (2,3)
STUDENT ATTENDENCE BY DAY	ATTENDENCE THIS MONTH

PARAMETERS
1. MONTH:
2. START DATE   01/01/2011
3. END DATE   12/31/2011

Sunday, March 11, 2012

10:23 PM

Use this menu to display and print reports on your dojo's activity.

NOTE: DMS is an open MS Access database, which allows you to use a variety of reporting tools such as Crystal Business Objects if you own this type of reporting software.

MESSAGING / REMINDERS

The system does allow you to send a private message to another user, or even set a reminder / to do to yourself.   To enter a new message, click on the "**Send Message / To Do**" button from the Main Menu.   This will open the message screen.

NEW MESSAGE

ENTRY DATE:	3/11/2012 SAVE EXIT
TO:	cdacey ▾ ITEM TYPE: Phone Call ▾
FROM:	Jane Doe Phone: (401) 555-5555

MESSAGE:

Please contact Mrs Jane Smith regarding adult classes.

PRIORITY: 3. Routine ▾   STATUS: OPEN ▾

 Choose a recipient from the drop down list and enter your message under the Message box. Select an item Type. Notice you can select either *Message*, *To-Do, or Phone Message*. To Do's are generally to yourself, messages are to other users, and phone calls can be used to record incoming phone messages.

Once you have entered and saved a new message, it will appear in the recipient user's open message screen on the Main Menu whenever they sign into the system.

MESSAGES

DATE SENT	MESSAGE PREVIEW	FROM	
3/11/2012	*Please contact Mrs Jane Smith regarding adu*	Jane Doe	VIEW
3/10/2012	*Please contact student regarding testing nex*	James Smith	VIEW
2/13/2012	*Needs call back on karate for two sons. Ages*	Kristen Sheldon	VIEW

Users need to "**View**" messages and change the message status to "CLOSED" to remove them from their Open Message queue on the Main Menu.

SUPPORT

Support can be purchased online either via a monthly subscription or a one-time support fee.

For further questions on using the system, or to report problems please contact us via our Web Site. We will try to respond to all support requests within 24 hours.

BACKUP / RESTORE

To backup your table data, click the BACK-UP CORE FILES button from the Main menu. The system will extract data from the core tables and create text file extracts of each table and store them in the C:\ADP\Backups\ directory.   This directory should have been created on your PC as part of your initial set-up process.
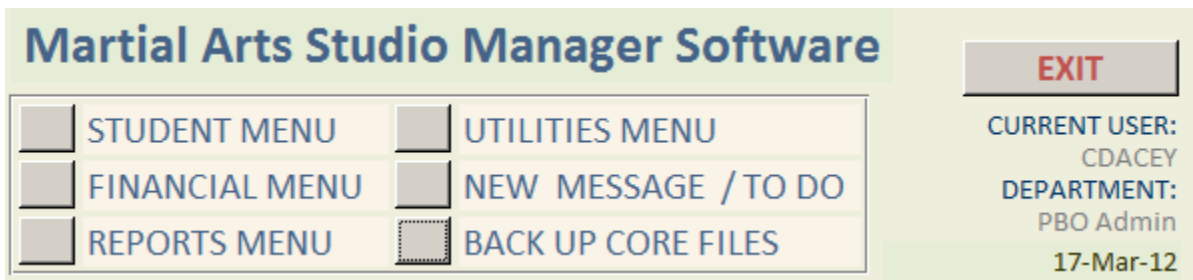
When the system finishes backing up the data, a message will alert you that the back-up is complete.
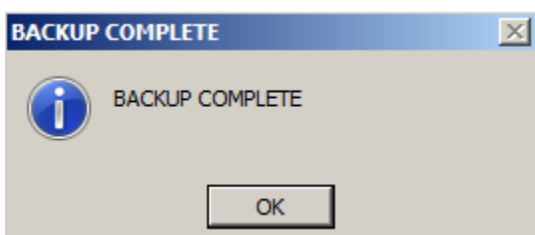
Click OK when complete.

Restoring Data:
To restore data, open the Utilities Menu, and click on the RESTORE DATA button. Restoring data will import records from the back-up text files into the database.

UTILITIES MENU

MAIN MENU

	EDIT SCHOOL INFO
	ENTER STAFF INFO
	USER AUDIT LOG
	SYSTEM ERROR LOG
	SERVICES
	ENTER GRADING LEVELS
	RESTORE DATA FROM BACKUP