

Splash V6

User Documentation

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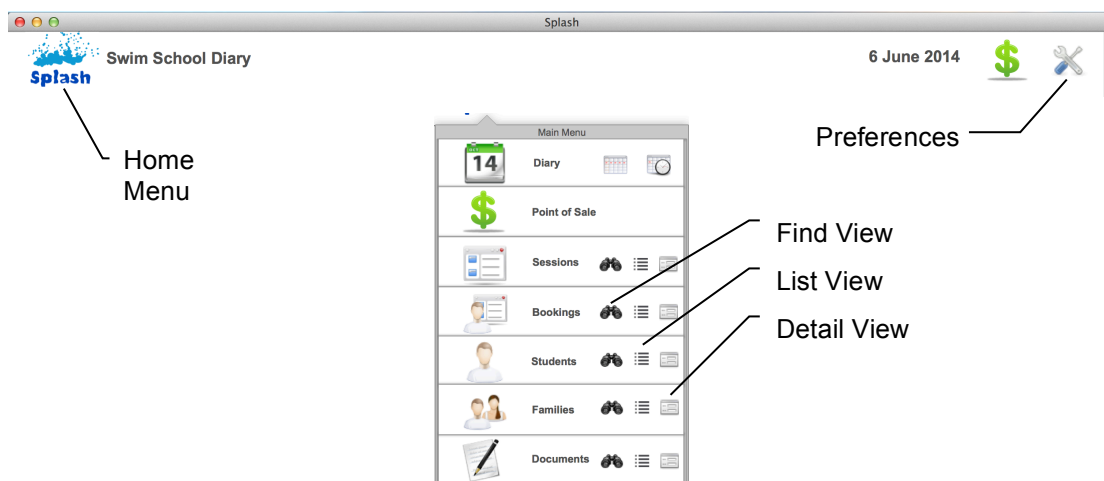
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The Splash Database

The Splash booking system is made up of seven major modules in three separate files. Each of these modules performs the specific functions required for successful operation of the system. The key modules are all displayed on the home menu:



Diary

This is the principal module within Splash. It contains an overview of all sessions and bookings with links to regularly used commands. Use this module to:

1. View Your Current Schedule
2. Make Student Bookings
3. Monitor Account Balances
4. Update Student Attendance
5. Enter Assessment/Achievement Information
6. Maintain your Waiting List

Point of Sale (POS)

Splash supports the processing of payments for both bookings and products. Each payment you receive can be recorded in this module. Use the POS module to generate financial reports, analyse sales, and monitor stock levels.

Sessions

This module contains a schedule of all sessions (your timetable). Class information such as date, time, and instructor is stored. The maximum class size is used to automatically calculate occupancy rates and ensure classes are not overbooked.

Bookings

This module contains a record of each student booking. Attached to each booking record is a progress report which contains a list of goals each student is working towards. Use this module to print booking documents and reports such as confirmation letters, instructor lists, attendance summaries, assessment lists and student certificates. An automated rollover function enables you to carry all current bookings forward to future blocks.

Students

Personal information about each student is maintained in this module. It includes a history of all bookings and details the students' progress toward class goals. This module can be used to generate birthday lists and mail merge documents.

Families

One record exists in this module for each household enrolled with the swim school. It includes a link to each of the swimmers from the same household. Use this module to monitor family accounts and generate correspondence.

Documents

Splash provides the ability to generate custom letters, faxes, emails as well as record file notes for each student or family. This module contains a history of all communication.

Preferences

Located beneath the tools icon on the top right corner of your screen. This module contains information about your swim school along with the default settings which govern the operation of Splash.

This module is divided into the following sections:

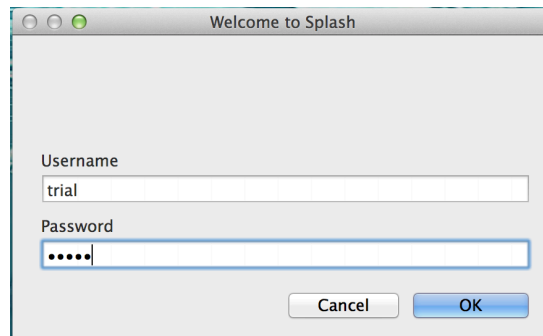
7. Class Levels
8. Classes,
9. Instructors
10. Document Templates,
11. School Details
12. System Defaults
13. Users.

Information entered in this module is automatically displayed in relevant areas of Splash. Define who has access to your Splash software and what they can access within the Users section of this module.

Logging On

Every time you launch Splash the login window will be displayed on your screen. To access the system you must enter a User Name and Password. It is important that the same login is not used on multiple workstations.

1. Enter your name in the **Username** field.
2. Enter your password in the **Password** field.
3. Click the **OK** button or press ENTER to begin.



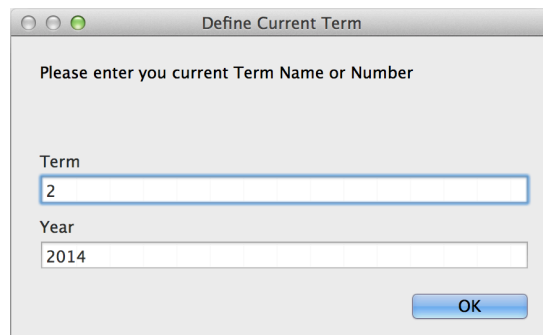
4. When you have successfully logged on the diary will be displayed on your screen.

NB: If you have not been assigned a username and/or password you must see your system administrator to have one assigned.

Optional Login Parameters

Your user account determines optional login parameters. If these have been set in your user account you will be asked to define the default term and year.

If entered, this information is passed to all search screens while you are logged in to the current session.

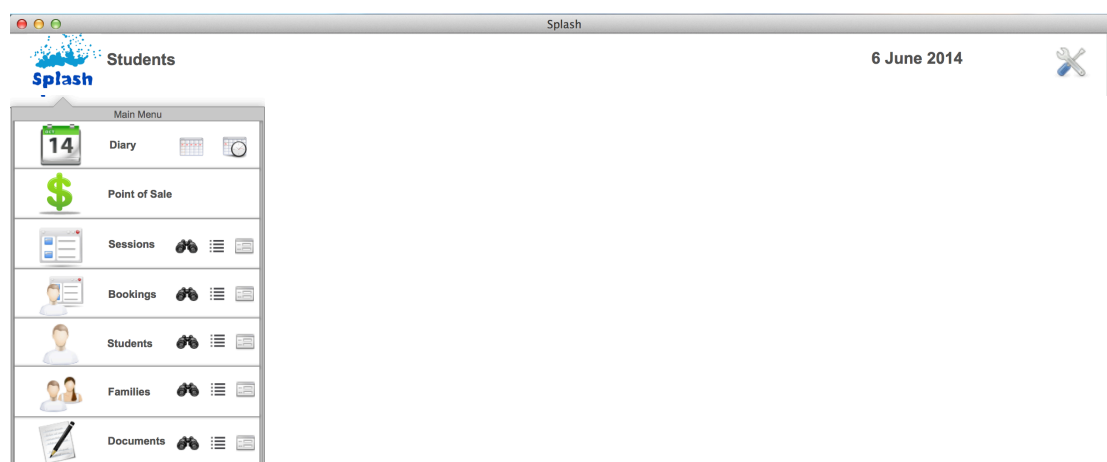


NB: Leave the term box empty if you only wish to push the year to all searches.

Database Navigation and Data Entry

Database Navigation

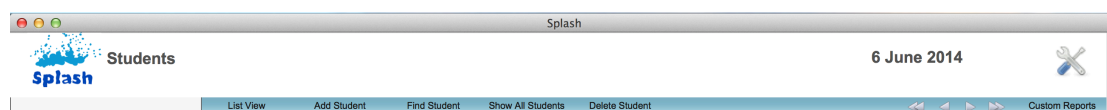
Navigating in Splash is performed via menu commands, keyboard commands, and onscreen button commands.



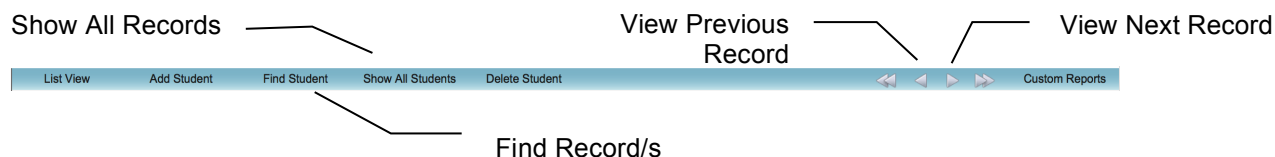
The Home Menu

The Home Menu (shown above) provides access to the most frequently used modules of Splash. Access the Splash menu by clicking the Splash icon on the top left corner of your screen

Title Bar Buttons



Title bar buttons provide access to most commonly used functions. The title bar (shown above) appears on nearly all Splash Screens.



The Magnifier

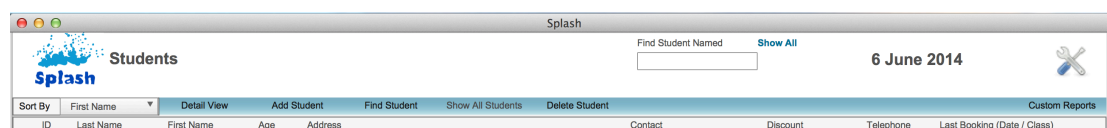


Click magnifier icon to display more detail about the selected line e.g. clicking the magnifier beside a student will display detailed student information.

NB: Holding down the SHIFT or CONTROL key while clicking the magnifier can produce different results.

List View Buttons

As with other Splash screens the title bar buttons appear at the top of the list view. Directly below the title bar buttons you will find the List View buttons. To the left of the column headings is the Sort menu.



Sorting a List



Displayed on the top left of all list view screens, the Sort By field provides the ability to perform either a custom sort, or a predefined sort of the current set of records. Click the **Sort**

By button to perform a custom sort or select a predefined sort order from the drop-down menu provided.

Function Buttons

Function buttons appear on most screens throughout Splash, they are designed to perform a specific function such as creating a booking or printing a report.

A rectangular button with a green plus icon and the text "Add Booking".A rectangular button with a green plus icon and the text "Add Catchup".

Moving From One Field to the Next

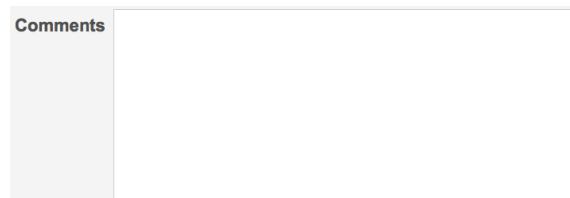
1. Press the TAB key to move from one field to the next.
2. Hold down the SHIFT key while you press the TAB key to move in the reverse direction.

Entering Information

Information in Splash can be entered in a variety of ways. Three basic methods are used.

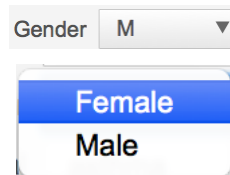
1. Text

Type directly into the field; address, telephone, and comments fields are all text fields.

A text input field with a label "Comments" on the left. The field is empty and has a light gray border.

2. Menu

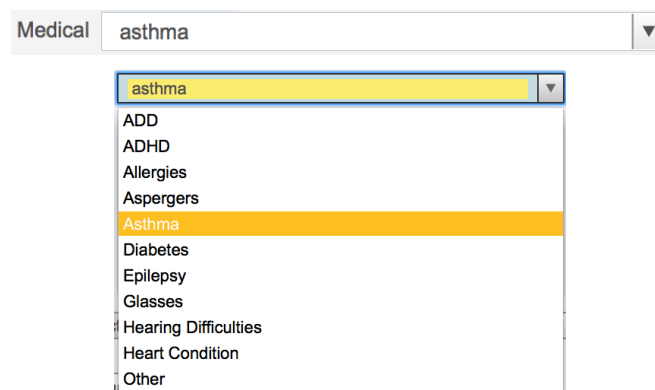
A menu will automatically be displayed when you tab into (or click in) a field. To choose from the list, click on the menu choice you require. When a menu is displayed you can only select from the list provided.

A dropdown menu for "Gender" with "M" selected. The menu is open, showing "Female" and "Male" as options.

NB: Hold down the SHIFT key while you select an item to deselect a menu item.

3. Drop-down List


Primarily used in a find dialog, a list will automatically be displayed when you tab into (or click in to) a field. If the menu is not automatically displayed; click the arrow on the right of the field. If you begin typing the list will automatically be filtered to match the text you have entered.

A dropdown menu for "Medical" with "asthma" entered. The menu is open, showing a list of medical conditions: "asthma", "ADD", "ADHD", "Allergies", "Aspergers", "Asthma" (highlighted), "Diabetes", "Epilepsy", "Glasses", "Hearing Difficulties", "Heart Condition", and "Other".

NB: Access is not restricted on a drop-down menu. You can always override the menu choices and type any text in the field.


4. Radio Button

Click in the circle to the left of the option you require. Only one item in the group can be selected. Change the current selection by choosing an alternative or remove all selections by holding down the SHIFT key while you click the current selection.

Telephone		
Home	<input type="text" value="04 478 4616"/>	<input type="radio"/>
Work	<input type="text"/>	<input type="radio"/>
 Cellular	<input type="text" value="0272222082"/>	<input checked="" type="radio"/>

5. Calendar

When keying into a date field you may type the date manually or click the calendar icon to select a date from the calendar menu provided.

Start Date 

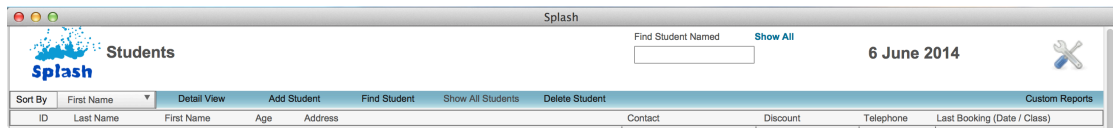
June 14						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12
Today: 6/06/14						

NB: Dates should be entered in the following format DD/MM/YYYY.

Sorting a Group of Records

Records can be sorted within any detail or list view screen. The sort command is only ever performed on the found set of records.

Sorting Records from List View

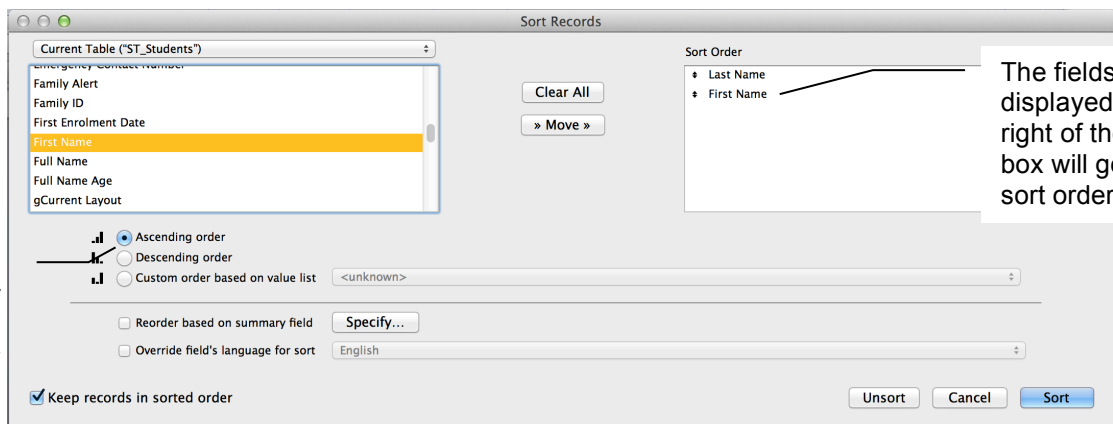


1. Quick sort options have been predefined within each module. Access the quick sort options for the selected screen by clicking once on the drop-down menu to the right of the Sort By button.

Sorting Records from Entry Form View

If a quick sort does not accommodate your needs, you can elect to perform a custom sort. A custom sort gives you the ability to sort the found set of records using any field in the current table or within a related table. Initiate a custom sort using the Sort By button on the top left of the required list view screen.

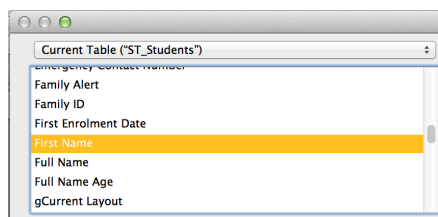
1. Click the **Sort By** button.
2. The Sort dialog box will be displayed on your screen.



The fields displayed on the right of the dialog box will govern the sort order

Sort in ascending or descending order

3. Double click an item in the list on the left to move the item to the Sort Order box on the right.



4. When the correct field names are displayed in the sort order box on the right of the dialog, click the **Sort** button.

Using Search Portals

Search portals appear in most detail screens. The purpose of the search portal is to enable you to locate records quickly without entering the find screen.

Bookings Portal

Enter the Term, Year, and Student Name to quickly locate a booking.

Click once on the booking record to display it on the right of your screen.

The selected booking will be highlighted within the search portal when it is displayed on the right of your screen.

Bookings

Filter By Student Name: Everyone

Term: 2 Year: 2014

Sort By: First Name

Amelia Harper	TUR	Wed
Anthony Apollo	DOL	Sun
Billy Jones	SEA	Sun
Bridgette	TUR	Wed
Bruce Taylor	DOL	Sun
Caroline	SEA	Fri
Celia Brown	TUR	Sun
Corey Morrison	SEA	Sun
Craig King	TUR	Sun
Craig King	DOL	Sun
Craig King	DOL	Sun
David King	DOL	Fri
denise taylor	TUR	Wed
Gareth Buchanan	DOL	Sun
Gaylene	DOL	Wed
Georgia Taylor	DOL	Sun
Harry Williams	SHA	Sun
Jack McArthur	DOL	Wed
Jack McArthur	SEA	Sun
Jacob Smith	SEA	Tue
Jacob Smith	SEA	Sun
Jamie watkins	DOL	Sun
Jane White	TUR	Wed
Jennifer Smith	TUR	Wed
Jenny Williams	DOL	Tue
Jessica	TUR	Wed
Jessica Sinclair	DOL	Sat
Jessica Sinclair	DOL	Sat
Joanne Jones	SEA	Sun
Lucas Smith	DOL	Sun

100 Browse

Sessions Portal

Enter a Class Name, Instructor, Term Weekday and Year to quickly locate a session

Click once on the session record to display it on the right of your screen.

The selected booking will be highlighted within the search portal when it is displayed on the right of your screen.

Sessions

Filter By:

All Class Name All

Instructor: 2 Term: 2014 Year:

☒ Monday ☐ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☐ Sunday

9:00AM TURTLES	Wed
2:00PM DOLPHINS	Wed
9:30AM DOLPHINS	Wed
1:00PM SEALS	Wed
1:00PM SHARKS	Wed
1:30PM WHALES	Wed
1:30PM DOLPHINS	Wed
9:30AM TURTLES	Wed
10:00AM TURTLES	Wed
10:30AM TURTLES	Wed
9:30AM SEALS	Wed
10:30AM SEALS	Wed
11:00AM SEALS	Wed
9:00AM PENGUINS	Fri
9:00AM TURTLES	Fri
2:00PM DOLPHINS	Fri
9:30AM DOLPHINS	Fri
1:00PM SEALS	Fri
1:00PM SHARKS	Fri
1:30PM WHALES	Fri
1:30PM DOLPHINS	Fri
9:30AM TURTLES	Fri
10:00AM TURTLES	Fri
10:30AM TURTLES	Fri
9:30AM SEALS	Fri
10:30AM SEALS	Fri

100 Browse

Students Portal

Enter a Student First Name or Last Name to quickly locate a student.

Click once on the student record to display it on the right of your screen.

The selected booking will be highlighted within the search portal when it is displayed on the right of your screen.

Students

Filter By Student Name: Show All

Sort By: First Name

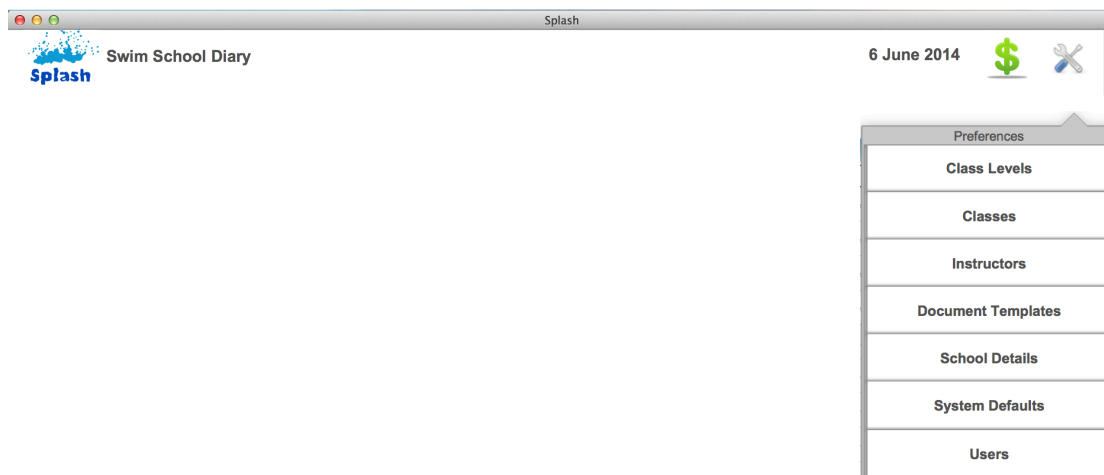
Jacob Smith	8_7m
Jason Smith	14_5m
Jennifer Smith	4_1m
Jessica Sinclair	10_3m
john Smith	6_11m
Lucas Smith	2_0m
Nathan Soloman	1_4m
Nicholas Smith	7_7m
Paula Schwass	8_2m
Phillip Smith	2_6m
Sally Anderson	11_0m
sam jones	1_2m
Sam Smith	7_7m
Sam Williams	4_0m
Sandra Patterson	2_11m
Sarah Nightingale	11_9m
Sarah Williams	9_5m
simon Jessop	7_9m
simon thomas	4_5m
Stephanie Hughson	11_10m
stuart pearson	4_1m
Stuart Sinclair	7_0m
Susan Aplin	3_0m
Tania Schwass	7_4m
william Smith	4_4m

100 Browse

Defining Preference Settings

System preferences should be defined prior to using any of the Splash booking functions. This area of the database enables you to customise Splash for use in your swim school. It contains generic information about your swim school, your lessons, and how you would like Splash to operate.

Preferences can be accessed by clicking the tools on the top right corner of your screen.



Before you begin using Splash fully the following Preferences should be defined.

Class Levels

Class levels determine the goals (or progressions) which need to be achieved within each class. These goals are carried through to the student booking when they first enter the class. Each of the assigned goals can then be monitored prior to a student being promoted to the next class.

Classes

The classes module contains a list of each class you conduct. It is widely recognised that each swim school operates within its own unique descriptions for each e.g. Dolphins, Seals, Breathers, Confidence, etc. Within the class file you should assign the class level it relates to. This links the actual class with a set of goals for the student to achieve.

Instructors

The instructor module contains a list of each swim instructor in your school. It is important to define which classes an instructor is qualified to take within this file. Failure to define instructor class relationships will make assigning an instructor to a session difficult.

Document Templates

Customise your confirmation letters and account reminder letters within this area of Splash. Unlimited templates can be created use as emails, letters, or SMS messages. Additional templates can be defined for use with families or individual students.

School Details

This section of the database contains information about your swim school – name, address, telephone, fax, account contact details, your school logo, etc. School information will be automatically transferred to the appropriate reports and correspondence modules within Splash as it is needed.

System Defaults

System Defaults is divided into six main areas; Documents, Bookings, Students, Lists, Shifts and Custom Reports. Each of these areas allows you to customise the operation of Splash for your swim school. Here you will define default paper sizes, auto print options, and the contents of menu data entry menus.

Documents

Use this area of Splash to define your default paper size, whether confirmations are automatically printed and whether your logo or address is displayed on printed material.

Bookings

Define whether catchups are allowed, what your attendance codes are, and the default date for payment of bookings within this area of Splash.

Student

In addition to the generic student details, this area of the database enables you to define custom fields for storing additional information. You have ten additional text and four additional date fields available.

Lists

This area of Splash allows you to define the items that will appear in many of the data entry menus.

Shifts

Forget searching for sessions or bookings based on the start time field. Simply define shifts by start and end time.

Custom Reports

In addition to the programmed reports you have the ability to define an almost unlimited number of additional reports. When defined as a custom report it will be displayed in the drop-down menu of Custom Reports.

Users

The user module contains access information for all logins for Splash. A person (or role) must be set up as a user before they can use Splash. A username and password, along with appropriate access privileges must be entered which define the operations that are available for each login. A cross displayed in a checkbox represents access to the selected task.

Defining Class Levels

Class levels determine the goals that need to be achieved within each class. These goals are copied to each student file when a booking is made. Each of the assigned goals should be achieved and can be updated during the lesson and prior to a student being promoted to the next class.

Displaying Class Levels

1. Click the **Preference** tools on the top right of your.
2. Select **Class Levels**.
3. The Class Level details will be displayed on your screen.

The screenshot shows the 'Class Levels' screen with the following components:

- Left Sidebar:** A list of levels to view, including -1 ASSESSMENT, LEVEL 1 through LEVEL 6, and BEGINNER SQUAD. 'LEVEL 4' is selected.
- Top Bar:** 'Class Levels' title, date '9 June 2014', and a 'List View' button.
- Main Area:** Fields for 'Level ID' (4) and 'Level Name' (Level 4). A 'Related Classes' section shows 'Dolphins'. A 'Comments' section is empty.
- Goals Table:** A table titled 'Enter the goals each swimmer should achieve within classes of this level' with columns 'ID', 'Description', and 'Abbrev Code'. It contains four rows of goals, each with a red 'X' in the 'Abbrev Code' column.

NB: Levels entered on this screen will be displayed in the level drop-down menu on the class entry screen. Assign the appropriate level to each class to ensure the correct goals are carried through to relevant bookings.

Displaying a List of Levels

1. Click the **Preference** tools on the top right of your screen.
2. Select **Class Levels**.
3. Click the **List View** button displayed in the blue stripe at the top of the screen.

The screenshot shows the 'Class Levels' screen with the 'List View' button selected. The table below lists the class levels and their related classes:

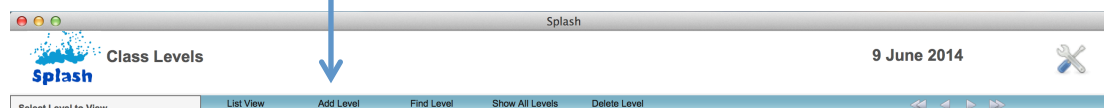
Sort By	Level ID	Level Description	Related Classes
	1	LEVEL 1	Private, Turtles
	2	LEVEL 2	Assessment, Penguins
	3	LEVEL 3	Seals
	4	LEVEL 4	Dolphins
	5	LEVEL 5	Sharks
	6	LEVEL 6	Whales, squid
	7	BEGINNER SQUAD	Bronze Squad

NB: Return to the detail screen by clicking

Entering a New Class Level



1. Click the **Preference** tools on the top right of your.
2. Select **Class Levels**.
3. Click the **Add Level** button displayed in the blue stripe at the top of your screen.



4. The **Add New Level** dialog will be displayed on your screen.

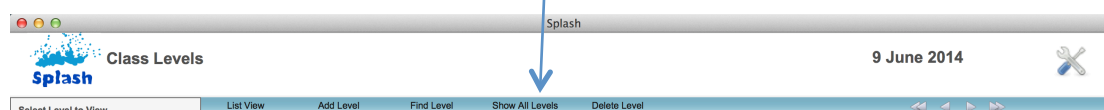
ID	Description	Abbrev Code
1	Bubble and breathe 10 metres	BB10
2	Kick on Back 10 metres	KB10
3	Breaststroke Kick 5 metres	BKick
4	Butterfly Arms 5 metres	FArms
5		

5. Enter a Level ID (it must be unique and it must be a number) and a Name for the level.
6. Enter each of the goals which should be achieved within the selected level.
7. Click **Done** to Save the information you have entered.

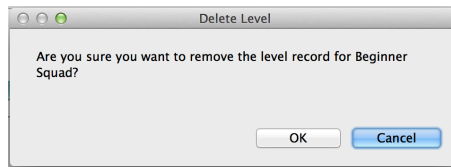
NB: Decimal numbers may be entered as level IDs.

Deleting a Class Level

1. Click the **Preference** tools on the top right of your screen.
2. Using the portal on the left of the screen, click once on Class Level you wish to delete.
3. The portal row will be highlighted to indicate it is the active record. The information for the active record will be displayed on the right of your screen.
4. Click the **Delete Level** button displayed in the blue stripe at the top of the screen.



5. A dialog will be displayed asking you to confirm the selected level is to be deleted.



6. Click the **OK** button to delete the selected level or Cancel to return to the Class Level screen without making any change.

Defining Document Templates

Document templates contain a list of regularly used documents. Within this module you can customise your confirmation letters and account reminder notices as well as generate new documents for regular use. You have the ability to create an unlimited number of documents for email, print, or SMS. The templates you create will access family and student data for personalisation.

The screenshot shows the 'Document Templates' window in the Splash application. The window has a title bar with 'Splash' and a date '9 June 2014'. Below the title bar is a menu bar with 'List View', 'Add Template', 'Find Template', 'Show All Templates', and 'Delete Template'. On the left is a 'Select a Template' sidebar with a list of templates, including 'Booking Confirmation' which is selected. The main area displays the 'Booking Confirmation' template. The 'Template Name' is 'Booking Confirmation' and the 'Subject Line' is 'Swim School Booking Confirmation'. The template body contains a thank you message, a class booking confirmation, and contact information. The 'Type' is 'Booking'. On the right, there are 'Fields' for 'Swim School Fields' (School Name), 'Family Fields' (Contact Name First), 'Student Fields' (First Name), and 'Booking Fields' (Discount Amt), each with an 'Insert Merge Field' button.

Creating a New Document Template

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Document Templates**.
3. Click once on the **Add Template** button to display a blank document template screen.

The screenshot shows the 'Document Templates' window in the Splash application. The window has a title bar with 'Splash' and a date '9 June 2014'. Below the title bar is a menu bar with 'List View', 'Add Template', 'Find Template', 'Show All Templates', and 'Delete Template'. On the left is a 'Select a Template' sidebar with a list of templates, including 'Public Holiday Closure' which is selected. The main area displays the 'Public Holiday Closure' template. The 'Template Name' is 'Public Holiday Closure' and the 'Subject Line' is 'No Lessons On Queens Birthday Weekend'. The template body contains a reminder message about a school closure. The 'Type' is 'Family'. On the right, there are 'Fields' for 'Swim School Fields' (School Name) and 'Family Fields' (Contact Name First), each with an 'Insert Merge Field' button.

4. Enter a Template Name as well as the subject line and body text for your template.
5. Use the Type menu to define how the document should be personalised. Select Student if you wish to include personal information about the student, or family if you wish to include personal information about the family.
6. The merge field buttons on the right will display fields relative to the type of template you have selected.
7. Use the **Merge Field** buttons on the right of the screen to insert placeholders for student and family details. Simply place your cursor in the position in your document where you would like a placeholder to appear.
8. Select the required field so it is displayed on the right of your screen.
9. Click the <<-- Insert Merge Field button to insert the placeholder.

NB: Merge field placeholders will be updated to display actual student information when the template is selected for use.

The screenshot shows a 'Fields' panel with the following structure:

- Swim School Fields**
 - Dropdown: School Name
 - Button: <<-- Insert Merge Field
- Family Fields**
 - Dropdown: Contact Name First
 - Button: <<-- Insert Merge Field
- Student Fields**
 - Dropdown: First Name
 - Button: <<-- Insert Merge Field
- Booking Fields**
 - Dropdown: Discount Amt
 - Button: <<-- Insert Merge Field

Blue arrows indicate the selection of 'Contact Name First' from the 'Family Fields' dropdown and the subsequent click of its '<<-- Insert Merge Field' button.

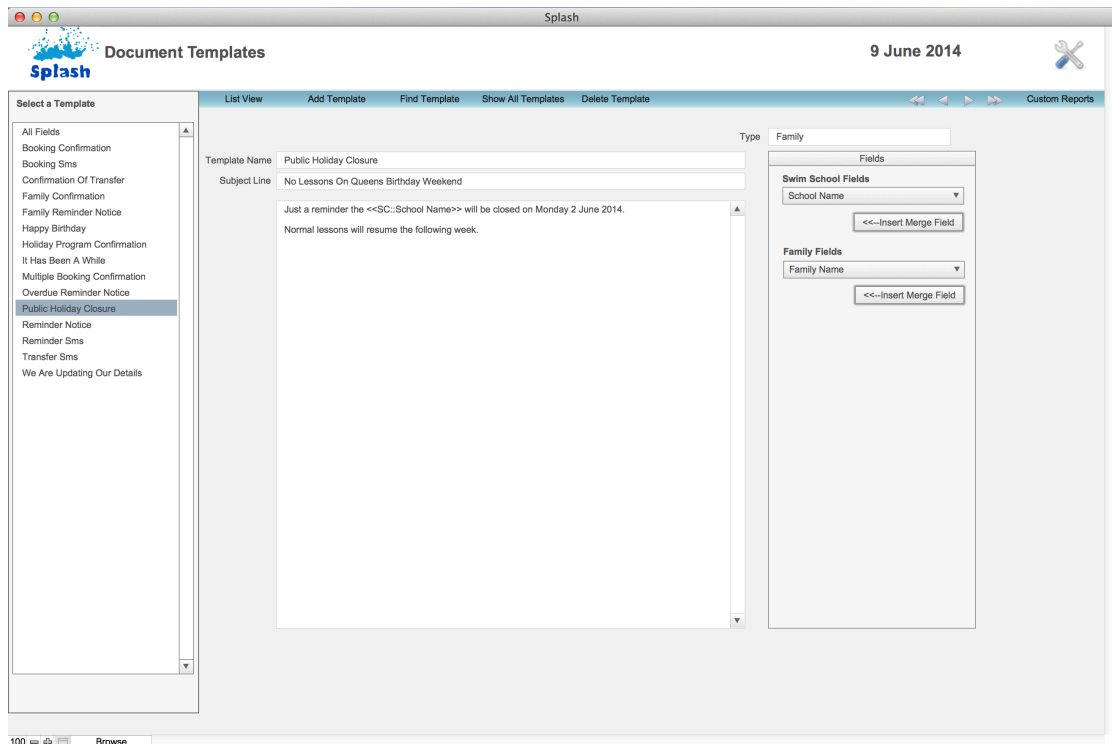
Editing a Document Template

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Document Templates**.
3. Using the portal on the left of the screen, click once on document template you wish to update.
4. The portal row will be highlighted to indicate the active record. The information for the active template will be displayed on the right of your screen.
5. Edit the document as required.
6. Your document will be saved as soon as you exit the current screen or choose another template.

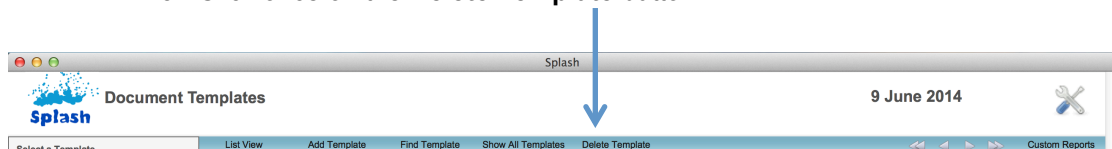
The screenshot shows the 'Document Templates' window in the Splash application. The window title is 'Splash' and the date is '9 June 2014'. The interface includes a 'Select a Template' sidebar on the left with a list of templates, including 'Booking Confirmation' which is selected. The main area displays the details for the 'Booking Confirmation' template. It shows the 'Template Name' as 'Booking Confirmation' and the 'Subject Line' as 'Swim School Booking Confirmation'. The body of the template contains a thank you message, a confirmation of booking, and a reminder to contact the school if the booking is incorrect. The right sidebar shows the 'Fields' section with dropdown menus for 'Swim School Fields' (School Name), 'Family Fields' (Contact Name First), 'Student Fields' (First Name), and 'Booking Fields' (Discount Amt), each with an '<<--Insert Merge Field' button. The bottom of the window shows a 'Browse' button and a '100' zoom level.

Deleting a Document Template

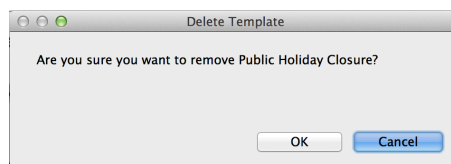
1. Click the **Preferences** tools on the top right of your screen.
2. Select **Document Templates**.
3. Using the portal on the left of the screen, click once on Template you wish to delete.
4. The portal row will be highlighted to indicate the active record. The information for the active template will be displayed on the right of your screen.



5. Click once on the **Delete Template** button.



6. You will be asked to confirm you wish to delete the selected template.



7. Click the **OK** button to delete the selected template or Cancel to return to the document template screen without making any changes.

School Details

This area of Splash contains information about your swim school – name, address, telephone, fax, contact person, school logo, etc. The school details you enter here are transferred to all relevant reports and correspondence as they are generated.

Updating School Details

1. Click the **Preferences** tools on the top right of your screen.
2. Select **School Details**.
3. Enter your School Name and Address information.
4. Click the Contacts, Shifts and Document Default tab cards to define additional information.
5. Press the TAB key to moved from one field to the next.

Splash School Details 9 June 2014

Displaying details for:

COMPUTER-IZE LIMITED

Your School Name Here
Street Address,
2nd Line of Street Address,
Suburb,
CITY 1234

Telephone:
Fax:
Email:
Website:

School Name Your School Name Here

Street Address
Line 1 Street Address
Line 2 2nd Line of Street Address
Suburb
City
Country Code 64 Post Code 1234

Postal Address
Line 1 Street Address
Line 2 2nd Line of Street Address
Suburb
City
Country Code 64 Post Code 1234

Website

Logo Click Arrow to Insert Logo

COMPUTER-IZE LIMITED

Contacts Shifts Document Defaults

Contact Details
Full Name
Telephone
Fax
Mobile
Email

Accounts Contact
Full Name
Telephone
Fax
Mobile
Email

ABN 123-456-789

Accept Credit Card Payments ☒ Visa ☒ Mastercard ☐ Diners ☐ AMEX

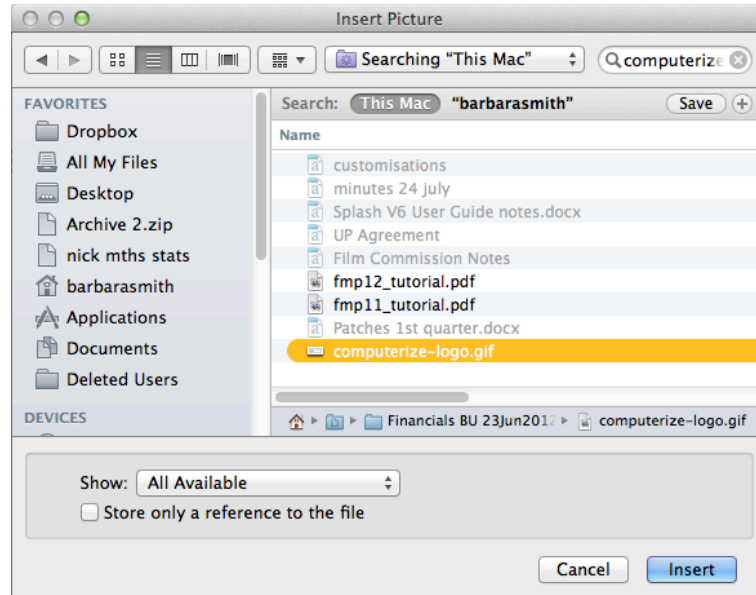
5. Copy your Street Address details into the Postal Address field by clicking the arrow displayed to the right of the Postal Address field.
6. If you are not using pre-printed stationery navigate to the Document Defaults tab card. Place a cross in the box **Print Address Details on Correspondence** to display address details as a letterhead on all correspondence.

NB: Define the credit cards your swim school accepts by checking the appropriate credit card boxes at the base of the screen. This information will be copied to the remittance advice within the booking confirmation letter.

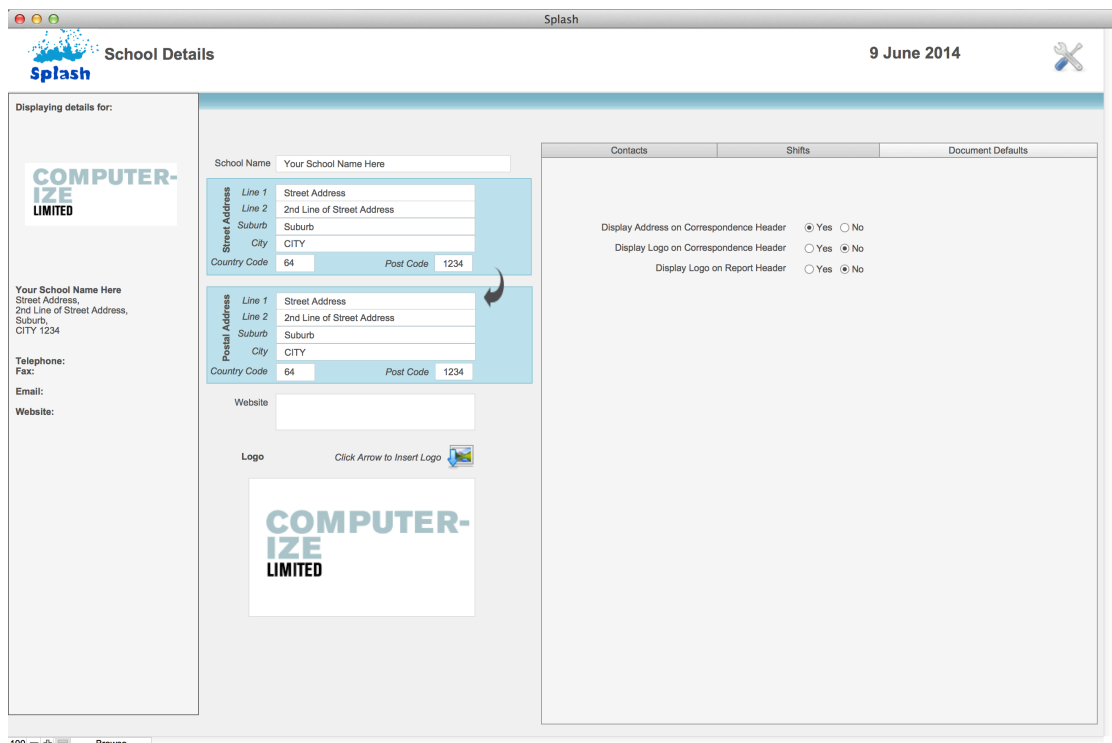
Importing Your School Logo

FileMaker Pro supports most standard image types. Images may be stored in the system using either copy and paste or they can be imported into the system using the Import Picture command.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **School Details**.
3. Click the Insert Logo button displayed above the logo field.



4. The **Insert Picture** dialog box will be displayed on your screen. Locate the file containing your logo and click the **Insert** button.



Displaying Your School Details on Correspondence or Reports

If you are not using pre-printed stationery you may elect to display your school address and/or logo on all correspondence generated within the Splash system.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **School Details**.
3. Click once on the **Document Defaults** tab card.
4. Select **Yes** to the right of **Print Address Details on Correspondence Header** to display address details as a letterhead on all correspondence.
5. Select **Yes** to the right of **Display Logo on Correspondence Header** to display your logo on the letterhead of all correspondence.
6. Select **Yes** to the right of **Display Logo on Report Header** to display your logo on the header of all reports.

The screenshot shows the 'School Details' form in the Splash system. The form is titled 'School Details' and has a date of '9 June 2014'. It is divided into several sections:

- Left Panel:** Displays the school's logo (COMPUTER-IZE LIMITED) and contact information (Telephone, Fax, Email, Website).
- Form Fields:** Includes fields for School Name, Street Address (Line 1, Line 2), Suburb, City, Country Code (64), and Post Code (1234). There are also fields for Postal Address, Street Address (Line 1, Line 2), Suburb, City, Country Code (64), and Post Code (1234).
- Document Defaults Tab:** This tab is selected and shows three sections: 'Contacts', 'Shifts', and 'Document Defaults'. The 'Document Defaults' section contains three radio button options: 'Display Address on Correspondence Header' (Yes/No), 'Display Logo on Correspondence Header' (Yes/No), and 'Display Logo on Report Header' (Yes/No).

The 'COMPUTER-IZE LIMITED' logo is shown in the left panel and as a preview in the bottom right of the form fields.

Defining System Defaults

System Defaults is divided into six main areas; Documents, Bookings, Students, Lists, Shifts and Custom Reports. Each of these areas allows you to customise the operation of Splash for your swim school. Here you will define default paper sizes, auto print options, and the contents of menu data entry menus.

The screenshot shows the 'System Defaults' window in the 'Splash' application. The 'Documents' tab is selected in the top navigation bar. The left sidebar contains settings for 'Swim School Default Settings'. The main area displays configuration options for the 'Documents' module, such as paper size, confirmation and reminder settings, and email options. A 'Helpdesk Support' section for 'COMPUTERIZE LIMITED' is visible on the right.

Documents

Use this area of Splash to define your default paper size, whether confirmations are automatically printed and whether your logo or address is displayed on printed material.

Bookings

Define whether catchups are allowed, what your attendance codes are, and the default date for payment of bookings within this area of Splash.

Student

In addition to the generic student details, this area of the database enables you to define custom fields for storing additional information. You have ten additional text and four additional date fields available.

Lists

This area of Splash allows you to define the items that will appear in many of the data entry menus.

Shifts

Forget searching for sessions or bookings based on the start time field. Simply define shifts by start and end time.

Custom Reports

In addition to the programmed reports you have the ability to define an array of additional reports. When defined as a custom report; the report will be displayed in the drop-down menu of Custom Reports within each module.

Updating Document Defaults

The default page size for all documentation in Splash is A4, the orientation of all correspondence will default to portrait. All printed correspondence is defined to fit a standard window envelope. You may elect to print receipts on either A5 or a custom size paper. All other documents may be printed on A4 or US Letter paper size.

Use this area of Splash to define whether or not you want to display your swim school address details and logo on correspondence and reports.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Documents** is selected within the set of tab cards across the top of your screen.
4. Select the required **Paper Size** for all documents and receipts.
5. Define whether your address and logo should be displayed on the header of each document.
6. Define whether receipts or confirmation letters should be automatically generated or emailed.

The screenshot shows the 'System Defaults' window in the 'Splash' application. The 'Documents' tab is selected. On the left is a sidebar with 'Swim School Default Settings'. The main area contains settings for documents. Arrows from the numbered list point to the following settings:

- 4. **Default Paper Size**: Set to ☒ A4, ☐ US Letter.
- 5. **Display Address on Correspondence Header**: Set to ☒ Yes, ☐ No.
- 6. **Automatically Print Receipt**: Set to ☐ Only When Family Entered, ☒ Yes, ☐ No.
- 7. **Email Method**: Set to ☐ Default Email Application, ☒ SMTP Server.

7. Define your default email method. Set to **Default Email Application** if you are using Windows Mail, Outlook, or another email application stored on your computer. Select **SMTP Server** if you are accessing your mail via a browser. Additional information is required if you select SMTP Server.

The close-up shows the 'Email Method' section with ☐ Default Email Application and ☒ SMTP Server. Below it is the 'SMTP Settings' section with 'Outgoing SMTP Server' and 'Port' fields.

8. Set **Enable SMS via SMS Global** to yes if you have created an account with SMS global for sending SMS messages.

NB: See additional documentation for configuring your SMS global account.

Updating Booking Defaults

Use this area of the Splash to define the default payment date for a booking and whether confirmation letters should be automatically generated when a booking is created.

Updating the Payment Required by Field

Confirmation of each booking may include a deadline for payment. Using the Splash system you may elect to define a specific Payment Required date or you may elect to define a payment deadline as a number of days before the first lesson date.

If payment is required by the first session date, simply place a "0" in the days before start field.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Bookings** is selected within the set of tab cards across the top of your screen.
4. Define the date for payment of each booking by updating either the **Payment Required by Date** or **Days Before Booking Start Date**.

NB: The payment required by date may be further customised for each booking at the time the booking is made.

The screenshot shows the 'System Defaults' window for the 'Bookings' tab. The left sidebar contains 'Swim School Default Settings' with options for paper size, catchup bookings, rollover, receipts, email, SMS, and connections. The main area has settings for 'Allow Catchup Bookings', 'Payment Required by Date' (set to 0), 'Set Automatic Rollover of Bookings' (set to Yes), and 'Define Shifts for Reporting' (showing Morning and Afternoon shifts). A 'Helpdesk Support' box for Computerize Limited is on the right.

Shift Name	Start Time	End Time
Morning	3:00 AM	1:59 PM
Afternoon	2:00 PM	10:59 PM

Setting Automatic Rollover as a Student Default

Confirmation letters and reminder notices may be printed or emailed to your students. This area of the database enables you to define whether the confirmation letters are automatically printed or emailed to your clients.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Select **Yes** in the **Set Automatic Rollover of Booking** field to default the student rollover field to "Yes" when a new student record is created.

Setting Defaults for Confirmation and Reminder Letters

Confirmation letters and reminder notices may be printed or emailed to your students. This area of the database enables you to define whether the confirmation letters are automatically printed or emailed to your clients.

Understanding Automatic Settings

Automatically Print Confirmation – automatically generate a confirmation letter when a booking is made.

Automatically Email Confirmation – automatically email the confirmation letter if there is an email address on file. This script is only triggered when the confirmation letter is generated. If you do not choose to automatically print a confirmation then this script will run whenever you manually generate a confirmation letter.

Automatically Email Reminder Notice – automatically email the reminder notice if there is an email address on file. This script is only triggered when you manually choose to generate a reminder notice.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Bookings** is selected within the set of tab cards across the top of your screen.
4. Define your Auto Print options for Confirmation Letters and Reminders by selecting the appropriate boxes.

Updating the Attendance Menu

The attendance menu is displayed in both the diary and the bookings for each student booking. Marking attendance gives you the ability to monitor sickness, makeups, public holidays as well as attendance. Booking can be generated which summarize the number of times each of the attendance codes has been used.

1. Click the Preferences tab card to display the **Preferences** screen.
2. Click once on the **System Defaults** button.
3. Click the Pencil button to the right of the Record Attendance field.
4. A popover window will display the current attendance options.
5. Simply edit an existing code, or click in the next available line to add a new code.
6. Click away from the popover window to save your changes.

Splash

9 June 2014

System Defaults

Splash

Swim School Default Settings

Default City For All New Records

Default Paper Size
☒ A4 ☐ US Letter

Allow Catchup Bookings
☒ Yes ☐ No

Set Automatic Rollover of Bookings
☒ Yes ☐ No

Automatically Print Receipts
 Only When Family Entered

Email Method
☒ Default Email Application
☐ SMTP Server

Enable SMS via SMS Global
☒ Yes ☐ No

Enable Connections via FileMaker Pro
 # Allowed Connections
 1

Documents
Bookings
Student
Lists
Shifts
Custom Reports

Allow Catchup Bookings ☒ Yes ☐ No

OR Payment Required by Date

Days Before Booking Starts

Set Automatic Rollover of Bookings ☒ Yes ☐ No

Include Booking Comments with Rollover ☐ Yes ☒ No

Automatically Print Confirmation ☒ Yes ☐ No

Automatically Email Confirmation ☒ Yes ☐ No

Automatically Email Reminder Notice ☒ Yes ☐ No

Record Attendance With

Define Shifts for Reporting

Shift Name

Morning

Afternoon

Amended shift settings will be applied to all future bookings

Update Attendance List

P	Present	1	
NA	Notified Absence	2	
A	Absence	3	
C	Cancelled	4	
PH	Public Holiday	5	

Type in the next available row to add another attendance code

COMPUTER-
IZE
LIMITED

Helpdesk Support

Should you have questions or comments please contact the author of this database.

For service or helpdesk enquiries please contact:

Computerize Limited
 barbara@computerize.co.nz

Telephone: +64 - 6 372 4713
 Mobile: +64 - 27 222 2082
 Fax: +64 - 6 372 4714

SKYPE: computerize

www.computerize.co.nz/contact

NB: Delete an existing attendance code by clicking the red cross to the right of the relevant attendance code. When deleting a record you will always be asked to confirm the record needs to be deleted.

Defining Custom Student & Family Fields

Although Splash captures a lot of generic information, there may be instances where you need to capture something not allowed for in the programme. Custom fields give you the ability to define additional student and family fields. You have the ability to add five text fields and date fields for each of the family and student files. These fields are searchable, however are not included in reporting. Use this module to determine the field labels that you would like to appear to the left of the custom field when it is displayed in the student/family file.

4. Click the **Preferences** tools on the top right of your screen.
5. Select **System Defaults**.
6. Ensure **Student** is selected within the set of tab cards across the top of your screen.
7. Overtyping the Custom Text field contents with the label you would like to appear within the student screen.
8. Overtyping the Custom Text field contents with the label you would like to appear within the family screen.

The screenshot shows the 'System Defaults' window in the Splash application. The window has a title bar with 'Splash' and a date '9 June 2014'. On the left is a sidebar with 'Swim School Default Settings' including options for paper size, catchup bookings, rollover, receipts, email, SMS, and FileMaker Pro. The main area has tabs for 'Documents', 'Bookings', 'Student', 'Lists', 'Shifts', and 'Custom Reports'. The 'Student' tab is active, showing 'Custom Fields for Students' and 'Custom Fields for Families'. Each section has 'Text Fields' (Custom Text 1-5) and 'Date Fields' (Custom Date 1-2). A 'COMPUTERIZE LIMITED' logo and 'Helpdesk Support' contact information are on the right.

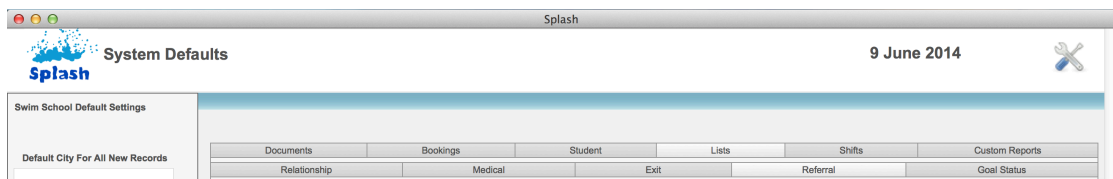
Defining List Values

This section of the database allows you to define the list items for several of the drop-down menus in the Splash system, it is divided into five sections: Relationship, Medical, Exit, Referral and Goal Status. The related fields in Splash will refer here to determine what items should be offered in the respective menus.

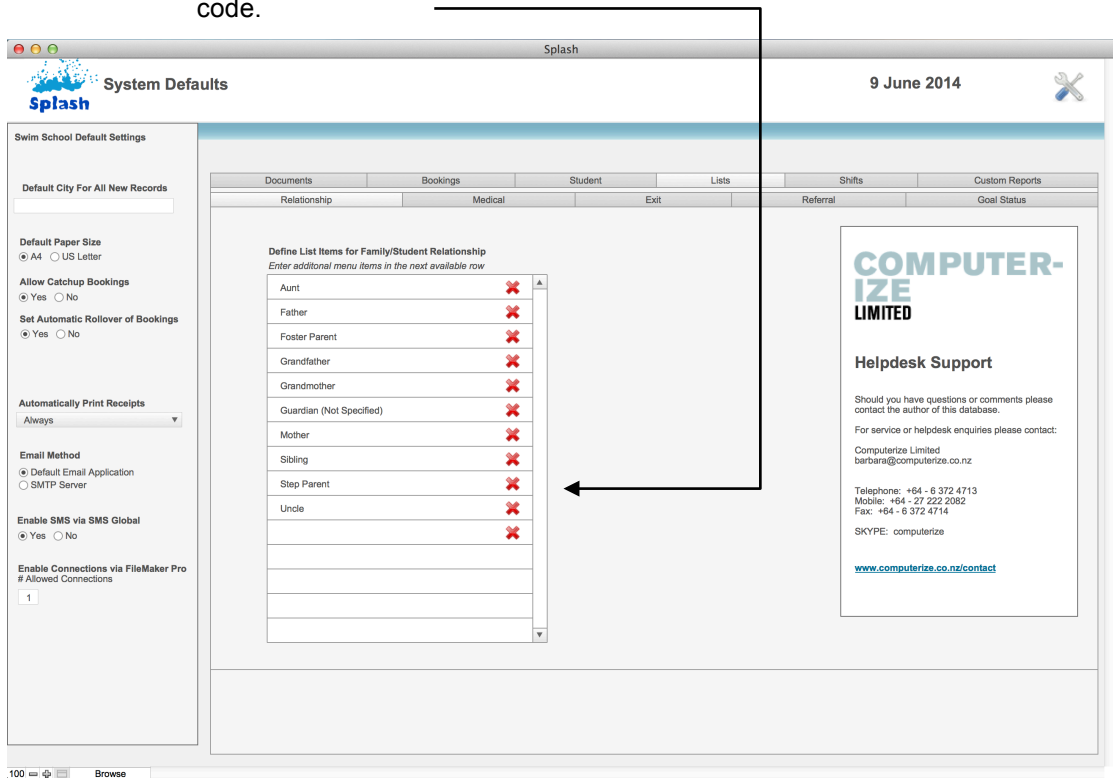
Defining List Items for Relationships

Items listed in this list will be displayed on the Bank drop-down menu when payments are entered.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Lists** is selected within the set of tab cards across the top of your screen.



4. Select the **Relationship** tab card.
5. Simply edit an existing code, or click in the next available line to add a new code.

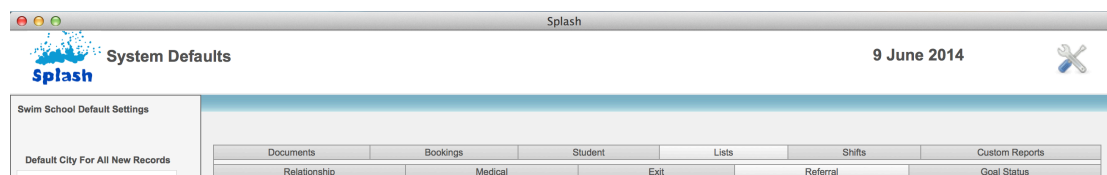


NB: Delete an existing relationship code by clicking the red cross to the right of the relevant code. When deleting a record you will always be asked to confirm the record needs to be deleted.

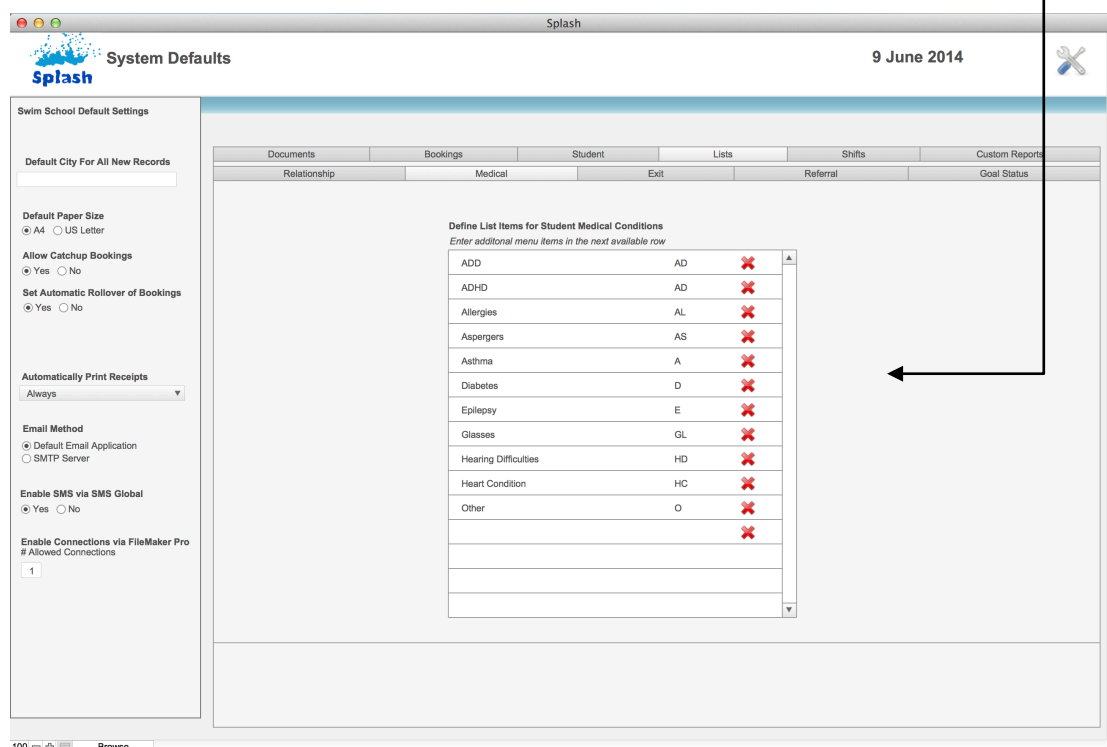
Defining List Items for Medical Conditions

This tab card contains a single list with two fields. A generic list of medical conditions will exist on the medical condition drop-down menu when you first start using Splash. This module provides the ability for you to further customise the list. Items displayed in this list will appear in the drop-down menu for medical conditions within the student record.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Lists** is selected within the set of tab cards across the top of your screen.



4. Select the **Medical** tab card.
5. Simply edit an existing code, or click in the next available line to add a new code. You may enter a description and an abbreviation – at this stage the abbreviation is not used elsewhere in the system.

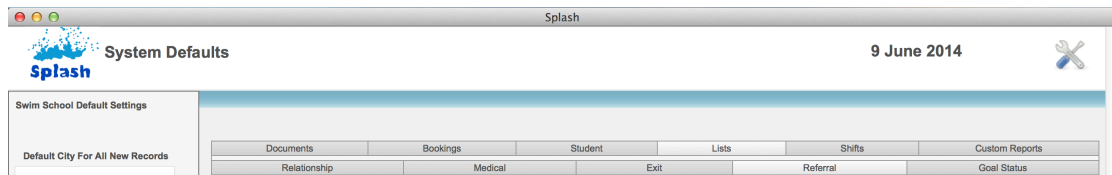


NB: Delete an existing medical code by clicking the red cross to the right of the relevant code. When deleting a record you will always be asked to confirm the record needs to be deleted.

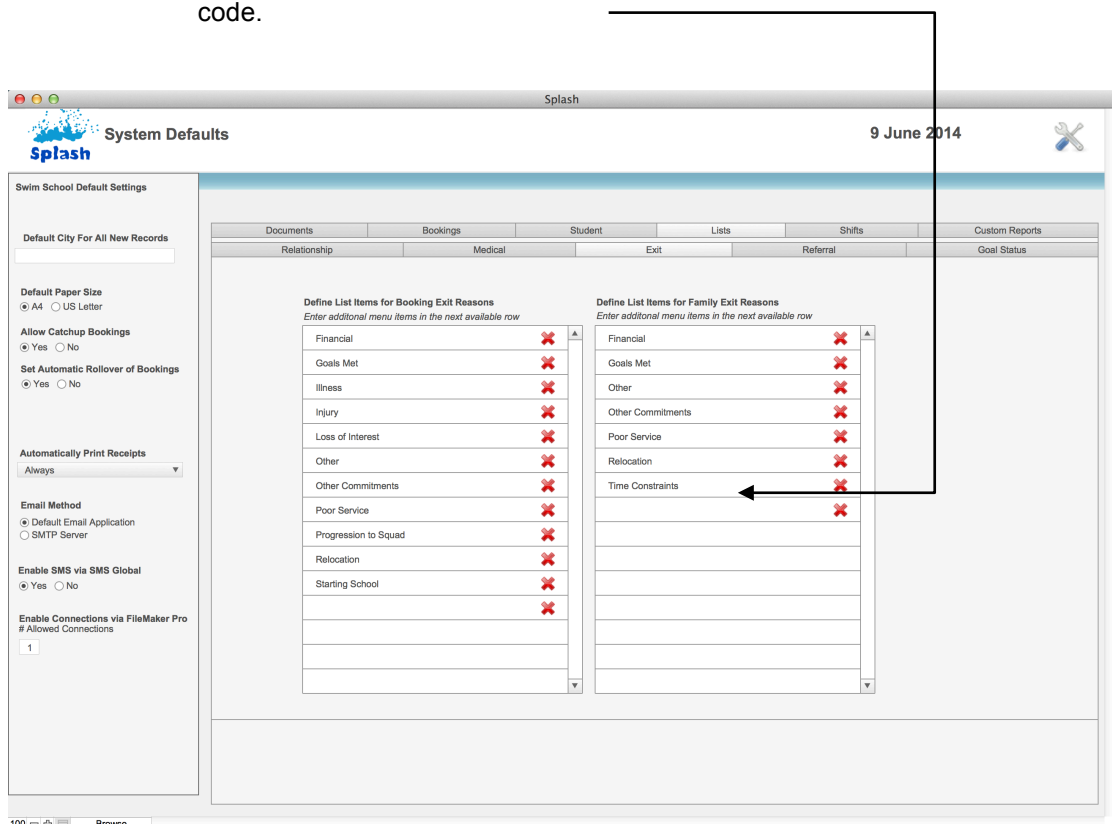
Defining List Items for the Exit Reason

This tab card contains two lists; the booking exit reason and the family exit reason. Items displayed in this list will appear in the drop-down menu for exit reasons within either the booking or the family record.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Lists** is selected within the set of tab cards across the top of your screen.



4. Select the **Exit** tab card.
5. Simply edit an existing code, or click in the next available line to add a new code.

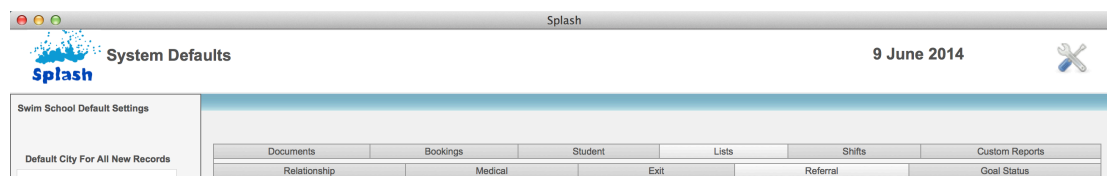


NB: Delete an existing exit code by clicking the red cross to the right of the relevant code. When deleting a record you will always be asked to confirm the record needs to be deleted.

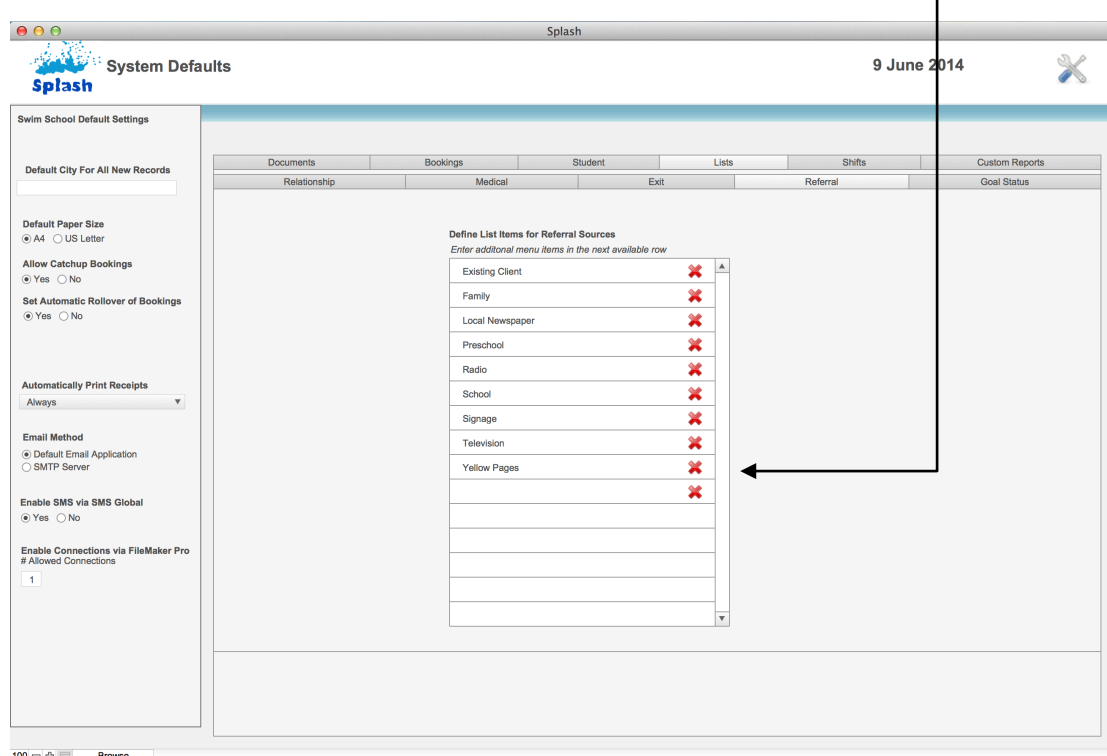
Defining List Items for the Source of Referral

Items displayed in this list will be displayed in the drop-down menu for source of referral within the family record.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Lists** is selected within the set of tab cards across the top of your screen.



4. Select the **Referral** tab card.
5. Simply edit an existing code, or click in the next available line to add a new code.



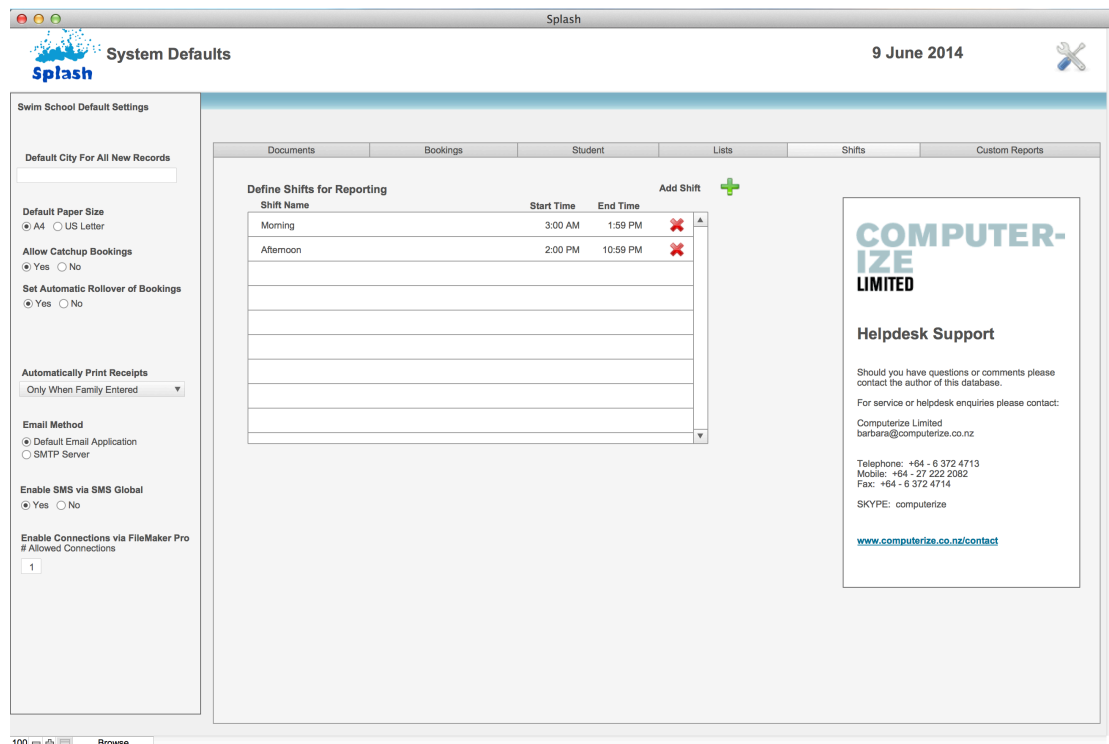
NB: Delete an existing referral code by clicking the red cross to the right of the relevant code. When deleting a record you will always be asked to confirm the record needs to be deleted.

Defining Shift Times

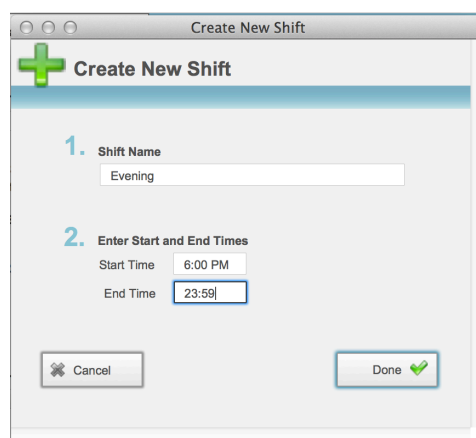
Forget searching for sessions or bookings based on the start time. Simply define shifts by start and end time and the shift name will be displayed in both the session and the bookings file. Shift information is updated at the time a session is created. If you change the times or names for a shift, the change will not take effect until new sessions are made.

Creating a New Shift

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Shifts** is selected within the set of tab cards across the top of your screen.



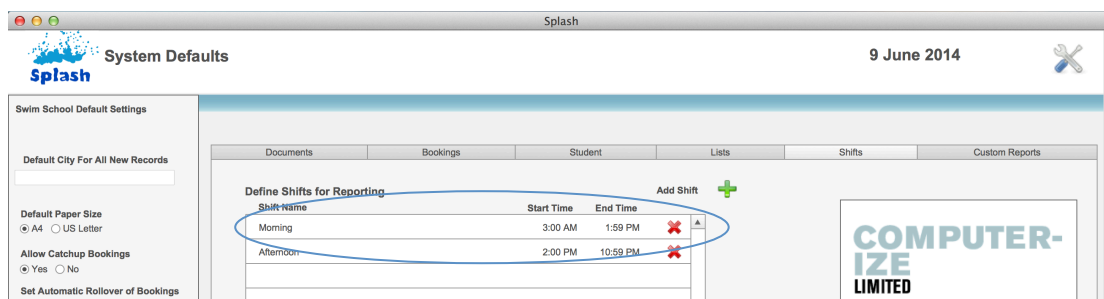
4. Click once on the **Add Shift** button to display the **Create New Shift** dialog.
5. Enter a Shift Name as well as the Start and End Time for the shift you are creating.
6. Click **Done** to save the shift details and close the dialog.



NB: It is important not to overlap shift times when creating new shifts. If a shift begins at 3pm, the previous shift probably ends at 2:59pm.

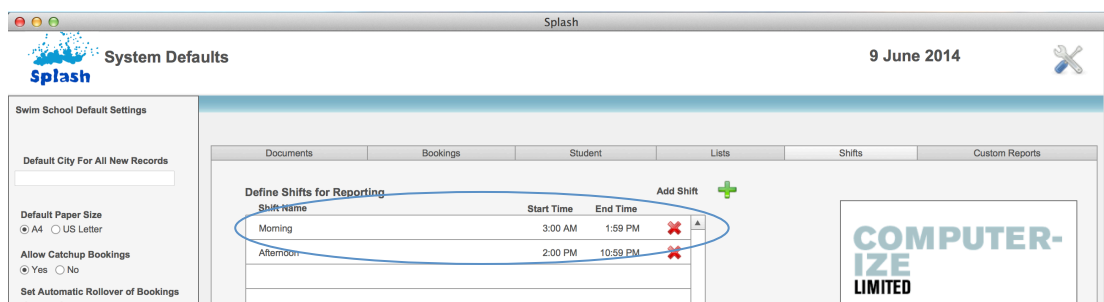
Editing an Existing Shift

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Shifts** is selected within the set of tab cards across the top of your screen.
4. Simply overtype the Shift Name or Time to amend the details of an existing shift.



Deleting an Existing Shift

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Shifts** is selected within the set of tab cards across the top of your screen.
4. Simply click the red cross to the right of an existing shift.



NB: After deleting a shift; existing sessions will retain their original shift information.

Updating an Shift Information on Existing Sessions

Shift information is assigned when the start time is entered on the session record. If you wish to update the Shift name for any existing session simply retype the start time in the relevant session record/s.

See User Guide : *Updating a Session*

Defining a Custom Report Template

In addition to the programmed reports you have the ability to define an array of additional reports. When defined as a custom report; the custom report will be displayed in the drop-down menu of Custom Reports dialog within each module. Many custom reports have already been created for you. Custom reports are available within the Bookings, Families, Sessions and Student modules.

There are two types of custom reports:

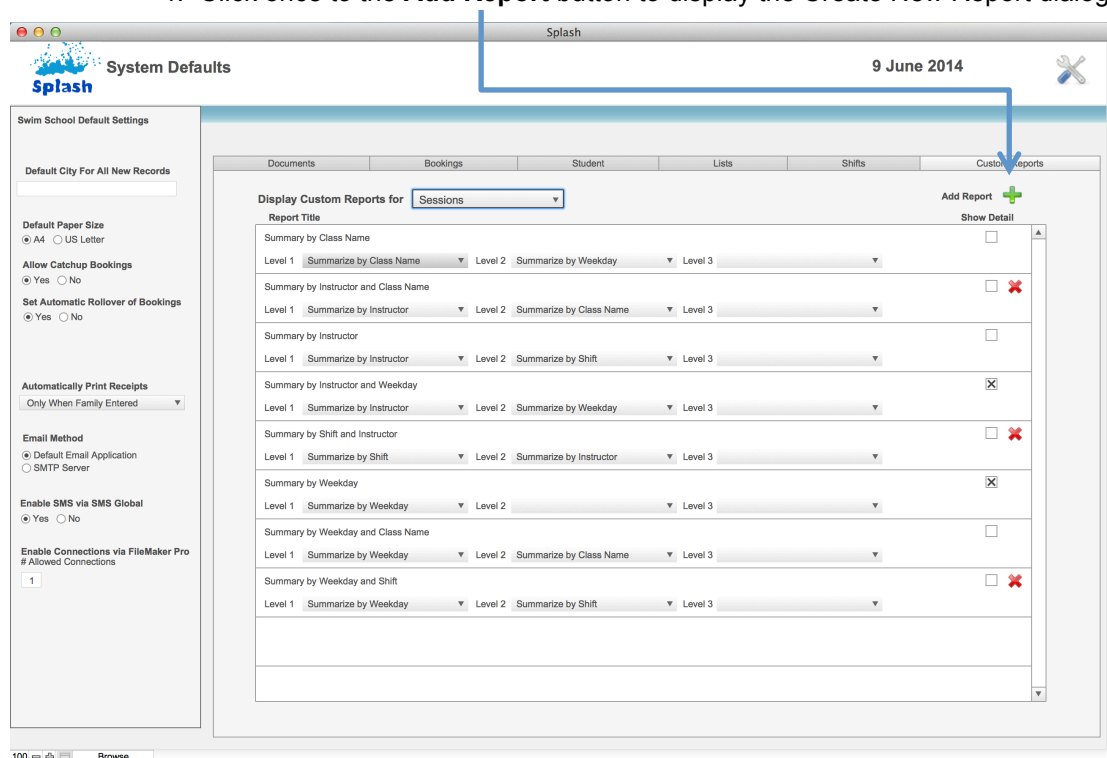
- Reports
- Graphs

Creating a Template for Custom Reporting

Student names have been defined to over print on paper (or card) of A5 size. This function enables you to reposition the student name on the certificate.

Check the printer specifications to confirm the weight (gsm) of the paper/card is suitable for use with your printer.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Custom Reports** is selected within the set of tab cards across the top of your screen.
4. Click once to the **Add Report** button to display the Create New Report dialog.



5. **Step 1** : Use the drop-down menu provided to define the Base Table for your new custom report.

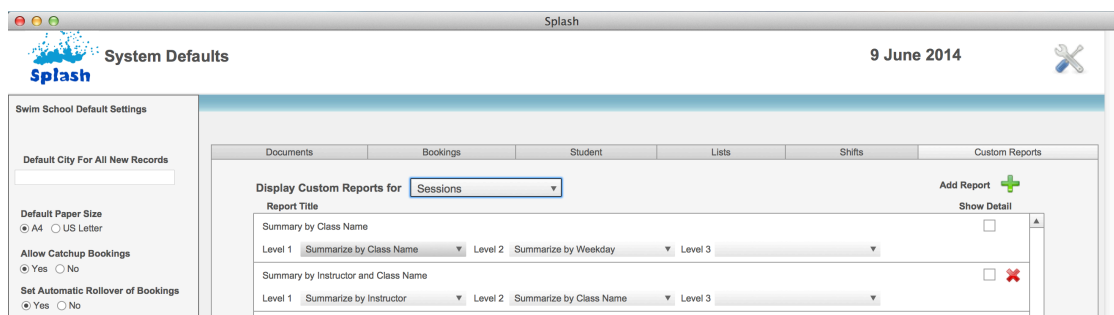


6. **Step 2** : Enter the name you will use to identify this report when it is displayed in the custom report menu.
7. **Step 3** : Select the summary groups which determine how the data will be grouped and displayed within your report.
8. Click Done to save the changes you have made and close the dialog.
9. Your new report is ready to be used, it will be displayed in the Custom Report portal on your screen.

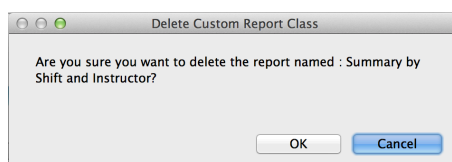
Deleting a Custom Report Template

Custom Reports fall into two categories; System Reports and Custom Reports. You cannot delete system templates. Custom Reports are displayed with a red cross (delete) on the right and can be removed from Splash. System reports are not displayed with a red cross and cannot be removed.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Custom Reports** is selected within the set of tab cards across the top of your screen.
4. Click once on the red cross (delete) button displayed to the right of the report you wish to remove.



5. You will be asked to confirm that the selected report should be removed.
6. Click **OK** to delete the report or **Cancel** to exit the dialog without making any changes.



Defining User Access

The user module contains access information for all Splash logins. A person (or role) must be set up as a user before they can use Splash. A username and password, along with appropriate access privileges must be entered which define the operations that are available for each login.

Six categories of access have been defined; Add, Delete, View, Report, Export, and Messages.

When creating a user account, a cross in the box represents access to a function ie. If you do not want the user to have access to the function, take the check out of the box.

The screenshot shows the 'User Accounts' window in the Splash application. The window has a sidebar on the left with a list of users: BARBARA SMITH, DAVID SMITH, SUSAN HARGREAVES, TRIAL, and USER. The 'Add User' button is selected in the top navigation bar. The main area shows the 'Add Trial to' section, which includes a 'User ID' field (2), a 'Name' field (Trial /), a 'Password' field (Trial), and an 'Access Level' dropdown (Design, Administrator, User). The 'Add Trial to' section also includes a table of checkboxes for various functions: ADD Records (Bookings, Sessions, Students, Families, Payments, Classes, Instructors, Users), VIEW & EDIT (Bookings, View Sessions, Edit Sessions, Students, Families, Payments, Classes, Class Levels, Instructors, Users), REPORT FROM (Bookings, Sessions, Students, Families, Payments, Classes, Instructors, Financial), EXPORT (*Import Records, *Export Records), and MESSAGES (Send Email, Send SMS). The status is set to 'Inactive'.

Displaying a List of Users

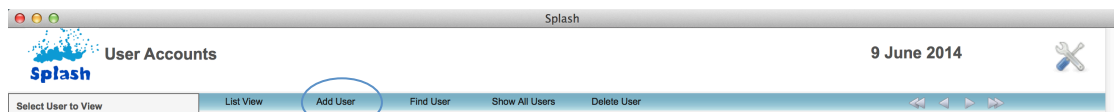
1. Click the **Preferences** tools on the top right of your screen.
2. Select **Users**.
3. Click once on the list view button displayed in the blue stripe at the top of your screen.

The screenshot shows the 'User Account' window in the Splash application. The window has a sidebar on the left with a list of users: BARBARA SMITH, DAVID SMITH, SUSAN HARGREAVES, TRIAL, and USER. The 'List View' button is selected in the top navigation bar. The main area shows a table of users:

Sort By	Access	User Name	Access	Email Address	Email Password	Set Default Term/Year
1		BARBARA SMITH	Design			Yes
2		TRIAL	Administrator			
3		USER	User			
6		SUSAN HARGREAVES	Administrator			Yes
7		DAVID SMITH	Administrator			Yes
8		JOHN SMITH	User			

Entering a New User

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Users**.
3. Click the **Add User** button to display the **Enter New User Account** dialog.



4. Enter a unique User Name and Password for the new user account.

A screenshot of the 'Enter New User Account' dialog box. The dialog has a title bar with 'Add New User'. Inside, there are fields for 'Name' (First Name: John, Last Name: Smith), 'User Name' (John Smith), and 'Password' (password). Below these are radio buttons for 'Access Level' (Design, Administrator, User) and a dropdown for 'Set Default Term and Year at Startup'. To the right, there are three columns of checkboxes: 'ADD Records', 'VIEW', and 'REPORT FROM'. Each column has a list of functions with checkboxes. At the bottom, there are 'Cancel' and 'Done' buttons.

5. Place a cross in the box to the right of all functions your new user should have access to.

A screenshot of the 'Enter New User Account' dialog box, similar to the previous one. A blue arrow points from the text 'Place a cross in the box to the right of all functions your new user should have access to.' to the 'Students' checkbox in the 'VIEW' column.

6. Leave the box blank to the right of any function your new user should NOT have access to.
7. Click the **Done** button to save the new user account and return to the User screen.

NB: At least one user account must have access to **ADD Records for Users** otherwise you will not have access to modify or add future user accounts.

NB: The Import and Export functions must be selected if a user is required to perform session or booking rollovers.

Deleting a User

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Users**.
3. Using the portal on the left of the screen, click once on User Account you wish to delete.
4. The portal row will be highlighted to indicate the active record. The information for the selected account will be displayed on the right of your screen.

The screenshot shows the 'User Accounts' interface. On the left, a list of users includes BARBARA SMITH, DAVID SMITH, JOHN SMITH (selected), SUSAN HARGREAVES, TRIAL, and USER. The main panel displays details for the selected user, John Smith (User ID 8). It includes fields for Name, Password, and Access Level (set to User). There are also sections for permissions and actions, such as 'Allow John to' (with a checkbox), 'ADD RECORDS' (with checkboxes for Bookings, Sessions, Students, Families, Payments), 'VIEW & EDIT' (with checkboxes for Bookings, View Sessions, Edit Sessions, Students, Families), and 'REPORT FROM' (with checkboxes for Bookings, Sessions, Students, Families, Payments). The 'Delete User' button is visible in the top navigation bar.

5. Click once on the **Delete User** button
6. You will be asked to confirm the account that is to be deleted.

The screenshot shows a 'Delete User' dialog box. The text inside the dialog asks: 'Are you sure you want to remove the account for John Smith?'. There are two buttons at the bottom: 'OK' and 'Cancel'.

7. Click the **OK** button to delete the selected account or Cancel to return to the User Account screen without making a change.

Defining Instructor Details

All instructors teaching at your swim school must be recorded in the instructor module. A session cannot be assigned to an instructor unless the instructor has been recorded and the appropriate class added to the list of Approved Classes.

Personal information and contact details for each instructor is displayed in the centre of the screen.

The screenshot displays the 'Instructors/Teachers' module in the Splash software. The interface includes a sidebar with a list of instructors, a central form for entering details, and a right-hand panel for approved classes and qualifications. A blue circle highlights the central form area.

Filter By Instructor Name: Everyone
Sort By: Full Name

To Be Advised:
Barbara Smith
Lynda Wightman
Brian Thomson
Dave Smith
Jane Brown
John Smith

Instructor ID: BS
Name: Barbara / Smith
Date of Birth: 2/5/1970
Gender: F
Age: 43
Medical:

Contact Details:
Address: 123 any st
Churton Park
Suburb:
City: Wellington **PC:**
Contact Details:
Email: barbaras@xtra.co.nz
Home: 04 478 4616
Mobile: 027 2222082
In Case of Emergency:
Name: David Smith
Telephone: 027 2731497

Approved for Classes:
Barbara has been authorised to take the following classes:

Class	Authorised Date
DOL	15/03/05
PEN	1/04/05
PRIV	10/05/05
SEA	1/04/05
SHA	1/04/05
TUR	10/05/05
WHA	2/03/05

Employment:
Start Date: 1/3/2005
End Date:

Restricted access to this area of the database ensures only approved system users can view the information.

Each instructor record also contains two tab cards:

- Approved for Classes
- Qualifications

Approved for Classes – this section of Splash is used to define which classes an instructor is qualified to teach. The lined portal should display each of classes you might need to assign the instructor to teach. The red cross is used to remove any class from the list.

The screenshot shows the 'Instructors/Teachers' interface in the Splash application. The top navigation bar includes 'List View', 'Add Instructor', 'Find Instructors', 'Show All Instructors', 'Delete Instructor', and 'Custom Reports'. The date '9 June 2014' is displayed in the top right. On the left, a sidebar lists instructors under 'To Be Advised', with 'Barbara Smith' selected. The main area is divided into two tabs: 'Approved for Classes' and 'Qualifications'. The 'Approved for Classes' tab is active, showing a list of classes Barbara is authorized to teach. The 'Qualifications' tab is also visible, showing a list of qualifications with their respective expiration dates. The 'Approved for Classes' list includes:

Class	Expiration Date	Action
DOL	15/03/05	✗
PEN	1/04/05	✗
PRIV	10/05/05	✗
SEA	1/04/05	✗
SHA	1/04/05	✗
TUR	10/05/05	✗
WHA	2/03/05	✗

The 'Qualifications' tab shows a list of qualifications with their respective expiration dates. The 'In Case of Emergency' section is also visible, showing the name 'David Smith' and telephone number '027 2731497'.

Qualifications –this section of Splash is used to record specific instructor qualifications and their respective expiration date. Record information such as first aid, or swim teaching qualifications in this area of Splash.

The screenshot shows the 'Instructors/Teachers' interface in the Splash application, specifically the 'Qualifications' section for Barbara Smith. The top navigation bar and sidebar are the same as in the previous screenshot. The 'Qualifications' tab is active, showing a list of qualifications with their respective expiration dates. The 'Approved for Classes' tab is also visible, showing a list of classes with their respective expiration dates. The 'Qualifications' list includes:

Qualification	Obtained	Expires
First Aid	9/06/13	9/06/14
AUSTSWIM	1/10/13	

The 'Approved for Classes' list is also visible, showing a list of classes with their respective expiration dates. The 'In Case of Emergency' section is also visible, showing the name 'David Smith' and telephone number '027 2731497'.

Displaying the Instructor Home Screen

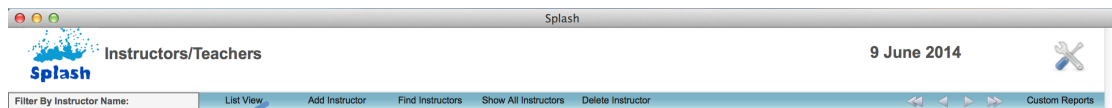
The instructor home screen displays as a list of all instructors registered to teach in your school.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Instructors**.

Listing Instructor Records

Each instructor record in Splash can be displayed in either the entry screen or list view. List view will display all records in the found set.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Instructors**.



3. Click once on the **List View** button displayed in the blue stripe at the top of your screen.
4. The list of Instructors will be displayed on your screen.

A screenshot of the 'Instructors/Teachers' screen in the Splash application, showing a list of instructors. The window title is 'Splash'. The header bar shows the Splash logo, the text 'Instructors/Teachers', the date '9 June 2014', and a wrench icon. Below the header is a blue navigation bar with buttons: 'Sort By', 'Full Name', 'Detail View', 'Add Instructor', 'Find Instructor', 'Show All Instructors', and 'Delete Instructor'. Below the navigation bar is a table with columns: ID, Last Name, First Name, Address, Email, Telephone, and Status. The table contains six rows of instructor data.

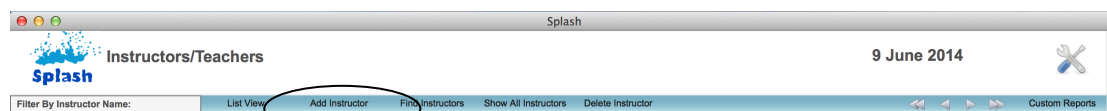
ID	Last Name	First Name	Address	Email	Telephone	Status
TBA	Advised	To Be		email@test.co.nz		Active
BS	Smith	Barbara	123 any st, Churton Park, Wellington	barbaras@xtra.co.nz	027 2222082	Active
LW	Wightman	Lynda	54 Wightson Rd, Tawa	lyndaw@paradise.net.nz	04 234 4568	Inactive
BT	Thomson	Brian	118 Main Rd, Tawa		04 567 3456	Active
DS	Smith	Dave			027 2222082	Active
JB	Brown	Jane				Active

NB: Click the magnifier beside the Instructor Name to display the corresponding data entry screen.

Entering a New Instructor

A new record should be created whenever the school employs a new instructor. An instructor cannot be assigned to teach a lesson unless they have been registered in the Instructor module.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Instructors**.
3. Click once on the **Add Instructor** button displayed in the blue stripe at the top of your screen.



4. A blank Instructor entry form will be displayed on your screen.

A screenshot of the 'Enter New Instructor' form. The form contains several input fields: 'Instructor ID' (with 'JS' entered), 'Name' (with 'John Smith' entered), 'Address', 'Suburb', 'City', 'PC', 'Email', 'Telephone', 'Mobile', 'Emergency Contact Name', 'Emergency Contact Telephone', and 'Comments'. There are also 'Cancel' and 'Done' buttons at the bottom. Two blue arrows point to specific fields with text annotations: one points to the 'Instructor ID' field with the text 'Instructor ID must be unique', and another points to the 'Telephone' field with the text 'Select default telephone number'.

5. Complete as many details as possible on the Personal screen. **An instructor record must contain an Instructor ID. The Instructor ID must be a unique identifier;** we recommend using instructor initials as the ID.
6. Click the **Done** button when all relevant details have been entered.
7. The Instructor details screen will be displayed.

A screenshot of the 'Instructor Details' screen. On the left, there is a list of instructors with 'Barbara Smith' selected. The main area shows the details for Barbara Smith, including her 'Instructor ID' (BS), 'Name' (Barbara Smith), 'Date of Birth' (2/5/1970), 'Age' (43), 'Gender' (F), and 'Medical' status. On the right, there is a table titled 'Approved for Classes' showing her qualifications, including 'First Aid' and 'AUSTSWIM'.

Defining Classes for an Instructor

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Instructors**.
3. Use the **Finding an Instructor** function to locate the instructor record you wish to update.
4. When the correct instructor screen is displayed use the portal on the right of the screen to enter the details of the classes the instructor is qualified to teach.
5. Define a new class by selecting the Class ID from the drop-down menu in the next available row. The name of the class will automatically be displayed to the right of the Class ID.
6. Enter the date approval was given for the instructor to teach the selected class.

The screenshot shows the 'Instructors/Teachers' management interface. On the left, a list of instructors is shown, with 'Barbara Smith' selected. The main form displays her details: Instructor ID 'BS', Name 'Barbara / Smith', Date of Birth '2/5/1970', Age '43', Gender 'F', and Medical history. Below this, contact details include address '123 any st, Churton Park, Wellington PC', email 'barbaras@xtra.co.nz', and emergency contact 'David Smith'. On the right, the 'Approved for Classes' section shows a table of authorized classes. A dropdown menu is open for the 'DOL' class, showing options like 'DOL', 'PEN', 'PRIV', 'SEA', 'SHA', 'sql', 'TUR', and 'WHA'. The table lists classes with their names and approval dates, each with a red 'X' in the final column.

Approved for Classes			
Class ID	Class Name	Approval Date	
DOL	Dolphins	15/03/05	X
PEN	Penguins	1/04/05	X
PRIV	Private	10/05/05	X
SEA	Seals	1/04/05	X
SHA	Sharks	1/04/05	X
TUR	Turtles	10/05/05	X
WHA	Whales	2/03/05	X

NB: The information will be saved as soon as you select another instructor or leave this screen.

Finding an Instructor

Using the Find Portal

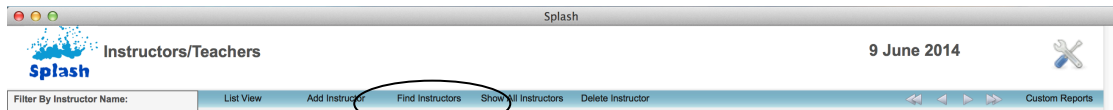
1. Click the **Preferences** tools on the top right of your screen.
2. Select **Instructors**.
3. The Instructor details screen will be displayed.

The screenshot shows the 'Instructors/Teachers' management interface in the Splash application. The top navigation bar includes 'List View', 'Add Instructor', 'Find Instructors', 'Show All Instructors', 'Delete Instructor', and 'Custom Reports'. The date '9 June 2014' is displayed in the top right. On the left, a 'Filter By Instructor Name' dropdown is set to 'Everyone', and a 'Sort By' dropdown is set to 'Full Name'. A list of instructors is shown, with 'Barbara Smith' selected. The main area displays the details for Barbara Smith, including her name, date of birth (2/5/1970), gender (F), age (43), and medical history. Below this, contact details are provided: address (123 any st, Churton Park, Wellington, PC), email (barbaras@xtra.co.nz), home phone (04 478 4616), and mobile phone (027 2222082). The 'In Case of Emergency' section lists David Smith as the contact. On the right, a table titled 'Approved for Classes' shows Barbara's authorization for various classes, including Dolphins, Penguins, Private, Seals, Sharks, Turtles, and Whales, with their respective dates and status (Active). A dropdown menu is open for the 'Approved for Classes' table, showing a list of instructors: DOL, PEN, PRIV, SEA, SHA, sql, TUR, and WHA.

4. Enter the instructor first name or last name in the portal filter displayed on the left of the screen.
5. Using the portal on the left of the screen, click once on Instructor you wish to display.
6. The portal row will be highlighted to indicate the active record. The information for the selected account will be displayed on the right of your screen.

Using the Find Command

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Instructors**.
3. Click once on the **Find Instructor** button located on the blue stripe at the top of your screen



4. The **Search for an Instructor** dialog box will be displayed on your screen.

A screenshot of the 'Search for an Instructor' dialog box. The dialog has a title bar with the Splash logo and the text 'Search for an Instructor'. It contains several search fields: 'Instructor ID' (with a magnifying glass icon), 'Name' (with 'smith' entered), 'Address' (with a magnifying glass icon), 'Contact Details' (with sub-fields for 'Email', 'Telephone', and 'Mobile', each with a magnifying glass icon), 'Emergency Contact' (with sub-fields for 'Name' and 'Telephone', each with a magnifying glass icon), and 'Comments' (with a magnifying glass icon). There is also a 'Status' dropdown menu. At the bottom of the dialog, there are five buttons: 'Cancel', 'New Request' (with a green plus icon), 'Omit Records' (with a red minus icon), 'Constrain Set', and 'Find Now' (with a magnifying glass icon).

5. Enter the criteria for your find by typing your search details in the appropriate fields.
6. Click the **Find Now** button.
7. If one record is located the record will be displayed on the Instructor entry screen. If multiple records are located the found set will be displayed in the list view.

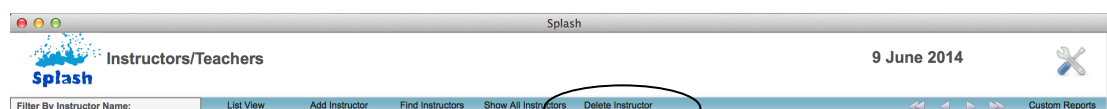
Updating Instructor Details

1. Use the **Finding an Instructor** function to locate the instructor record you wish to update.
2. When the correct instructor screen is displayed simply overwrite any of the information to update the information that has been stored.

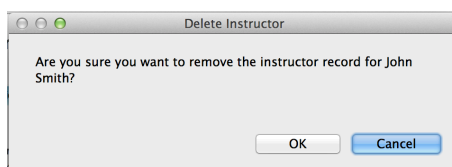
Deleting an Instructor Record

As a rule a record should only be deleted if it was made in error.. Instructor records can be deleted from either the Instructor entry screen or the list view.

Deleting an Instructor from List View



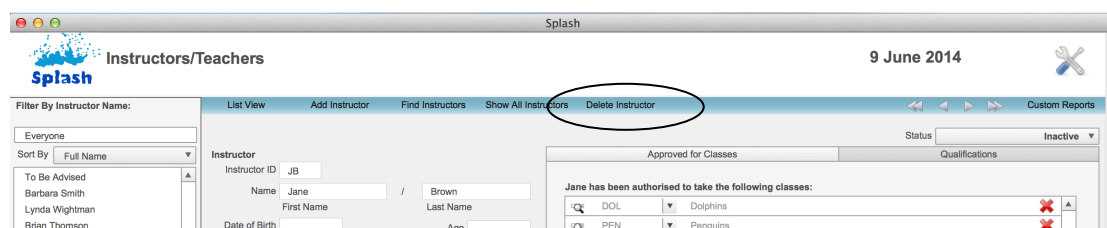
1. Use the **Finding an Instructor** function to locate the instructor record you wish to delete.
2. When the correct instructor screen is displayed click once on the row containing the instructor you wish to delete.
3. Click once on the **Delete Instructor** button.
4. You will be asked to confirm you wish to delete the selected Instructor.



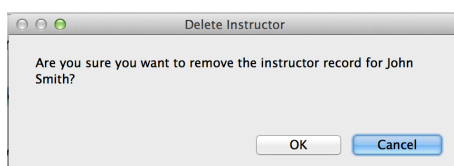
5. Click **OK** to delete the selected instructor or **Cancel** to return to the instructor screen without making a change.

Deleting an Instructor from the Instructor Entry Screen

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Instructors**.
3. Using the portal on the left of the screen, click once on Instructor you wish to delete.
4. The portal row will be highlighted to indicate the active record. The information for the selected instructor will be displayed on the right of your screen.



5. Click once on the **Delete User** button
6. You will be asked to confirm the instructor that is to be deleted.



7. Click the **OK** button to delete the selected Instructor or Cancel to return to the Instructor screen without making a change.

Changing an Instructor to Inactive

Changing an instructor to inactive will not affect sessions that have already been assigned to the selected instructor. It will however prevent you from being able to assign the instructor to additional sessions while they are inactive. Approved classes will be made inactive at the same time as the instructor record is made inactive.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Instructors**.
3. Using the portal on the left of the screen, click once on Instructor you wish to update.
4. The portal row will be highlighted to indicate the active record. The information for the selected instructor will be displayed on the right of your screen.
5. Update the **Status** field on the top right of your screen.

The screenshot shows the 'Instructors/Teachers' management screen in the Splash application. The interface includes a sidebar with a list of instructors, a main form for editing an instructor's details, and a table of approved classes. A blue arrow points from step 5 of the instructions to the 'Status' dropdown menu, which is currently set to 'Inactive'.

Splash Instructors/Teachers 9 June 2014

Filter By Instructor Name: Everyone
Sort By: Full Name

Instructor
Instructor ID: JB
Name: Jane / Brown
First Name: Jane Last Name: Brown
Date of Birth: Age:
Gender: Medical:

Approved for Classes
Jane has been authorised to take the following classes:

Class	Qualifications
DOL	Dolphins
PEN	Penguins
PRIV	Private
SEA	Seals
TUR	Turtles

NB: If you wish to reinstate an instructor simply return to the same screen and change the record status back to Active.

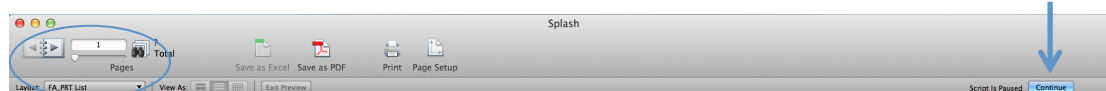
Printing Instructor Reports

You must be in the Instructor section of the database to print the following reports. All reports are generated from the Print menu.

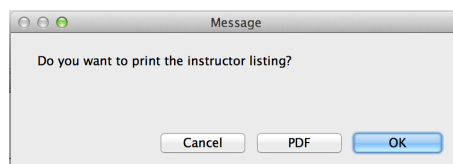
Printing a List of Instructors

This report displays the name, address and contact details for the found set of instructors.

1. Use the **Finding an Instructor** function to locate the instructor record you wish to include in your report or click the **Show All Instructors** button to include all instructors,
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Instructors** from the pop-out menu displayed.
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.



6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

List of Instructors/Teachers

Instructor Name & Address		Telephone	Mobile
TBA	To Be Advised		027 2222082
BS	Barbara Smith 123 any st, Churton Park, Wellington	04 478 4616	027 2222082
LW	Lynda Wightman 54 Wightson Rd, Tawa	04 234 4568	027 2222082
BT	Brian Thomson 118 Main Rd, Tawa	04 567 3456	027 2222082
DS	Dave Smith		027 2222082
JB	Jane Brown		027 2222082
JS	John Smith		

Defining Class Details

The Class Record

The Classes home screen contains a record of all classes offered within your school. Each class record contains generic class information along with the following three tab cards:

Approved Instructors – Use this area of the screen to maintain a record of which instructors are qualified to take the class. Simply enter the Instructor ID in the next available row.

The screenshot shows the 'Classes' screen in the Splash application. The left sidebar lists class categories: ASSESSMENT, PRIVATE, TURTLES, PENGUINS, SEALS, SHARKS, WHALES, SQUID, and BRONZE SQUAD. The main area displays the details for a class named 'DOLPHINS' (Class ID: DOL). The class is a 'Lesson' at 'Main Pool' with a size of 4 and level 4. The display color is set to 'Red' (231). The cost of session is \$10.00. The 'Approved Instructors' tab card is active, showing a list of instructors: BS (Barbara Smith), BT (Brian Thomson), JB (Jane Brown), and TBA (To Be Advised). The 'Goals' and 'Colours' tabs are also visible.

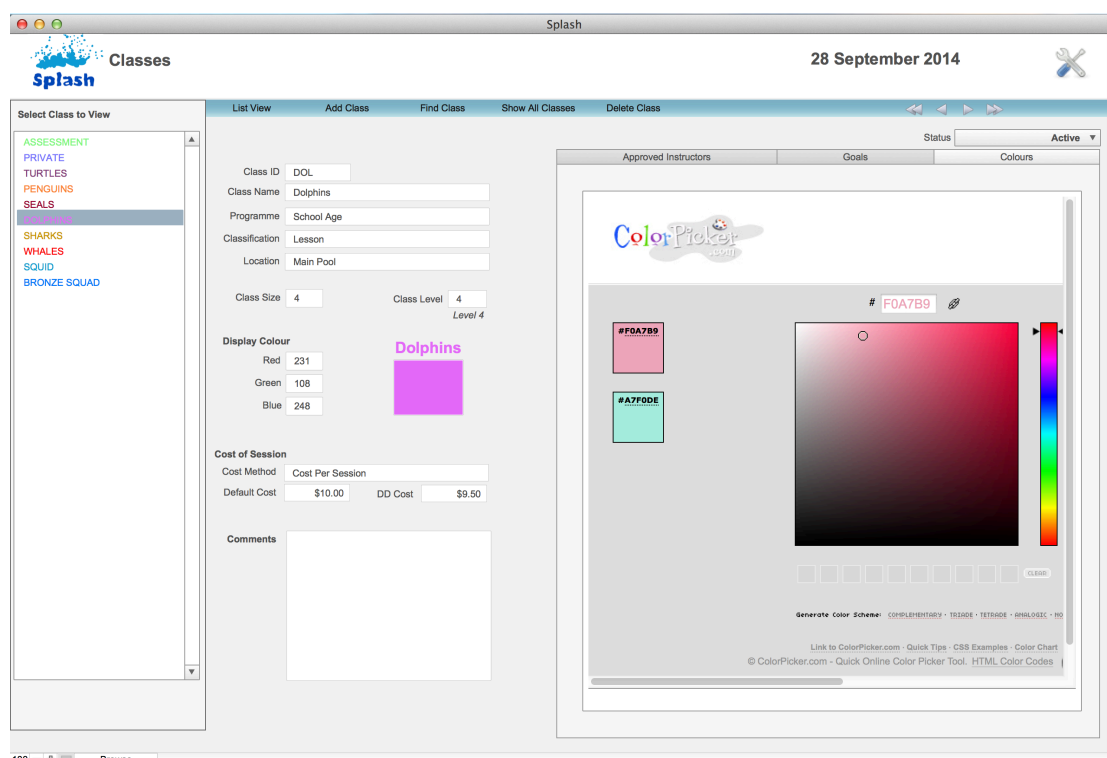
Approved Instructors	Goals	Colours
BS	Barbara Smith	15/03/05
BT	Brian Thomson	4/04/05
JB	Jane Brown	
TBA	To Be Advised	

Class Goals – Displayed in the second tab card on the right of the screen; here you can view a list of goals that should be achieved by each student in this class. The goals displayed here relate to the class level you have selected on the left of the screen..

The screenshot shows the 'Classes' screen in the Splash application, with the 'Goals' tab card active. The class details are the same as in the previous screenshot. The 'Goals' tab card displays a list of goals for Level 4: 1. Bubble and breathe 10 metres (BB10), 2. Kick on Back 10 metres (KB10), 3. Breaststroke Kick 5 metres (BKick), and 4. Butterfly Arms 5 metres (FArms). The 'Colours' tab is also visible.

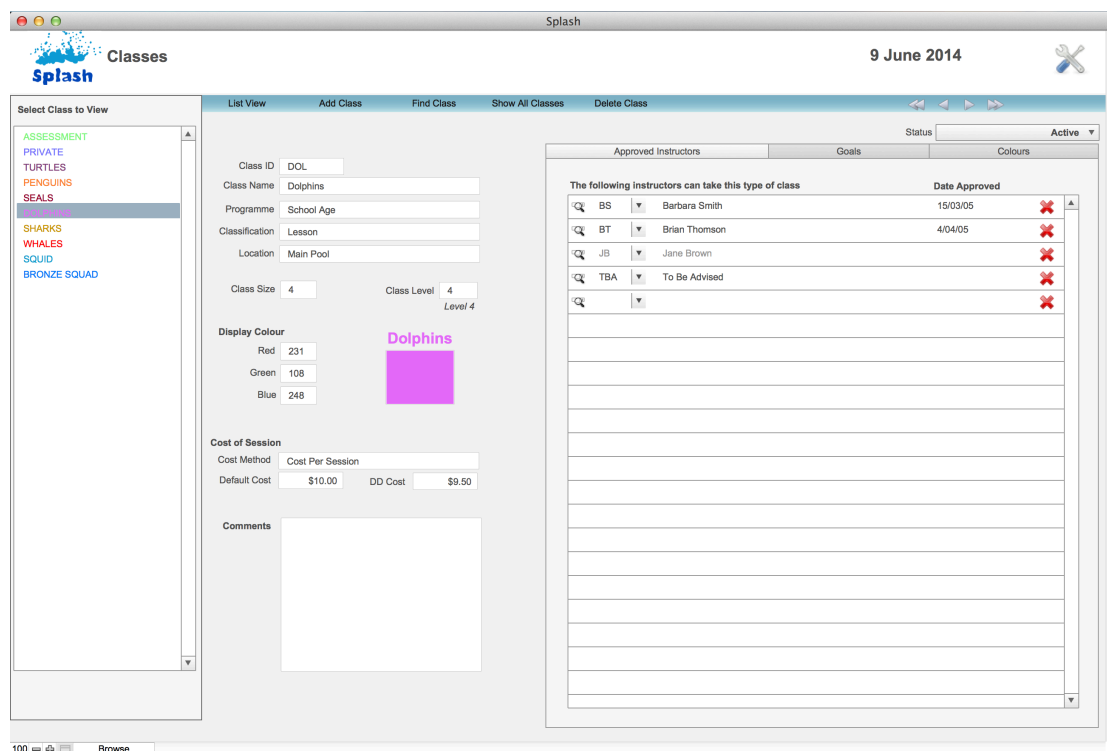
Class Level	Level 4 Goals Displayed Below	Abbrev Code
1	Bubble and breathe 10 metres	BB10
2	Kick on Back 10 metres	KB10
3	Breaststroke Kick 5 metres	BKick
4	Butterfly Arms 5 metres	FArms

Class Colours – Displayed in the third tab card on the right of the screen; Colours links to a page on the internet so you can view a spectrum of colours. It is used to define the colour of the text when a class is displayed in the diary or session listings within Splash..



Displaying the Class Home Screen

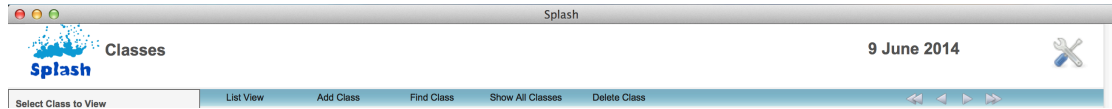
1. Click the **Preferences** tools on the top right of your screen.
2. Select **Classes**.



Listing Class Records

Each record in your database can be displayed in either the entry screen or list view. List view will display all records in the found set – see the bottom left corner of the screen for the size of the current found set.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Classes**.



3. Click once on the **List View** button displayed in the blue stripe at the top of your screen.
4. The list of Classes will be displayed on your screen.

Splash

Splash

Classes

9 June 2014

Sort By

Size

▼

Detail View

Add Class

Find Class

Show All Classes

Delete Class

ID	Name	Level	Programme	Classification	Size	Colour	Cost Method	\$	DD \$
ASMT	Assessment	2	Assessment	Lesson	6		Cost Per Session	\$0.00	\$0.00
PRIV	Private	1	Private	Lesson	1		Cost Per Session	\$15.50	
TUR	Turtles	1	Preschool	Lesson	8		Cost Per Session	\$15.00	
PEN	Penguins	2	Preschool	Lesson	4		Cost Per Session	\$8.50	
SEA	Seals	3	School Age	Lesson	4		Cost Per Session	\$10.00	
DOL	Dolphins	4	School Age	Lesson	4		Cost Per Session	\$10.00	\$9.50
SHA	Sharks	5	School Age	Lesson	6		Cost Per Session	\$10.00	
WHA	Whales	6	School Age	Lesson	10		Cost Per Session	\$10.00	
SQI	squid	6	Preschool	Lesson	4		Cost Per Session	\$15.00	
BRO	Bronze Squad	7	Competitive	Squad	10		Cost Per Term	\$100.00	\$100.00

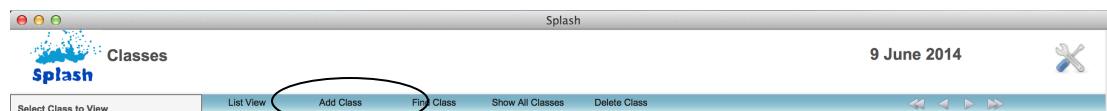
NB: Click the magnifier beside the Class ID to display the corresponding data entry screen.

Entering a New Class

A class record should be created whenever a new class is offered by your swim school. A session cannot be created unless the related class exists in the class module.

Information in this screen is copied to the session record when a new session is created for this class.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Classes**.



3. Click once on the **New Class** button
4. A blank Class entry screen will be displayed on your screen

A screenshot of the 'Add New Class' form. The form has a title bar 'Add New Class' and a sub-header 'Enter New Class'. It contains several input fields: 'Class ID' (with 'SH' entered), 'Class Name' (with 'Seahorse' entered), 'Programme' (empty), 'Classification' (empty), 'Location' (empty), 'Class Size' (empty), and 'Class Level' (empty). There are also 'Display Colour' controls for Red, Green, and Blue, each with a value of 0. A 'Cost of Session' section includes 'Cost Method' (empty), 'Default Cost' (empty), and 'DD Cost' (empty). A 'Comments' text area is at the bottom. At the bottom right, there are 'Cancel' and 'Done' buttons.

5. Enter a unique Class ID. A minimum of three characters is required.
6. For flexibility in reporting you can define a **Programme** (preschool, afterschool, etc) and a **Classification** (Lesson or Squad) for each class.
7. Enter the Class Level to link this class to the set of goals which are required.

A screenshot of the 'Add New Class' form, similar to the previous one, but with the 'Class Level' dropdown menu open. The dropdown menu lists the following options: '-1 Assessment', '1 Level 1', '2 Level 2', '3 Level 3', '4 Level 4', '5 Level 5', '6 Level 6', and '7 Beginner Squad'. The 'Seahorse' class name is visible in the background.

8. Goals for this class will automatically appear when the class record is saved
9. Enter the Cost method and default price for the class.

Understanding Class Costs

Class costs can be defined in one of two ways;

Cost per Session – The cost of the block is dependant upon the number of lessons in the block e.g. if running a 4 week block the cost will be the Cost Price multiplied by 4, if running a 10 week block the cost will be the Cost Price multiplied by 10. Select this method if the amount you charge your clients differs depending on the number of lessons each term.

Cost per Term – The cost of the block is the same for all bookings irrespective of the number of lessons. Select this method if the amount you charge does not differ for a 4 or 5 week month or does not differ for a 10 or 11 week block.

Default Cost – The value that will be carried through to all sessions as the default price.

DD Cost – The value that will be carried through to all sessions as the default Direct Debit price. This price will be used to calculate the cost for clients who have been identified as paying by Direct Debit.

NB: You have the ability to override the default price for each booking using discounts, credits, and Swim for Free Values when a booking is made.

Understanding How Costs Affect Rollover

All costs are copied to a session at the time the session record is created. In the case of a rollover the cost for the new term is set at the value displayed here at the time the rollover was done.

If you wish to change pricing for the coming term, remember to update the class record prior to completing your rollover.

Defining Approved Instructors

This area of Splash is used to define which instructors are qualified to teach the selected class. The lined portal should display each of instructors who might need to be assigned. The red cross is used to remove any instructor from the list

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Classes**.
3. Using the portal on the left of the screen, click once on class you wish to update.
4. The portal row will be highlighted to indicate the active record. The information for the selected class will be displayed on the right of your screen.

The screenshot shows the 'Classes' management interface in the Splash software. On the left, a sidebar lists various class categories: ASSESSMENT, PRIVATE, TURTLES, PENGUINS, SEALS, DOLPHINS, SHARKS, WHALES, SQUID, BRONZE SQUAD, and SEAHORSE. The 'SEAHORSE' class is selected. The main area displays the details for the 'Seahorse' class, including Class ID (SH), Class Name (Seahorse), Programme (Preschool), Classification (Lesson), Location (Learners Pool), Class Size (6), and Class Level (4). A 'Display Colour' section shows a green square. On the right, a table lists approved instructors: BS Barbara Smith, BT Brian Thomson, DS Dave Smith, JS John Smith, and TBA To Be Advised. Each instructor has a date approved and a red cross icon to remove them from the list.

5. Use the portal on the right of the screen to define the instructors approved to take the class.
6. Enter each instructor on the next available line in the portal.
7. The information will be saved as soon as you select another class or exit this screen.

Defining Goals for the Class

The goals, which are displayed for each class, are solely dependant on the class level which has been assigned. If the goals are incorrect simply assign another level or update the goals in the Class Levels area of Splash.

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Classes**.
3. Using the portal on the left of the screen, click once on class you wish to update.
4. The portal row will be highlighted to indicate the active record. The information for the selected class will be displayed on the right of your screen.
5. Select the **Goals** tab card to view the goals currently assigned to the class.

The screenshot shows the 'Classes' management interface in the 'Splash' application. On the left, a sidebar lists various class categories: ASSESSMENT, PRIVATE, TURTLES, PENGUINS, SEALS, DOLPHINS, SHARKS, WHALES, SQUID, BRONZE SQUAD, and SEAHORSE. The 'SEAHORSE' category is selected. The main area displays the details for the 'Seahorse' class, including Class ID (SH), Class Name (Seahorse), Programme (Preschool), Classification (Lesson), Location (Learners Pool), Class Size (6), and Class Level (4). The 'Goals' tab is active, showing a list of goals for Level 4. The goals are: 1. Bubble and breathe 10 metres (BB10), 2. Kick on Back 10 metres (KB10), 3. Breaststroke Kick 5 metres (BKick), and 4. Butterfly Arms 5 metres (FArms). The interface also includes a 'Display Colour' section with a green color swatch and a 'Cost of Session' section with input fields for Cost Method, Default Cost, and DD Cost.

6. If necessary update the Class Level to link this class to the set of goals which are required.

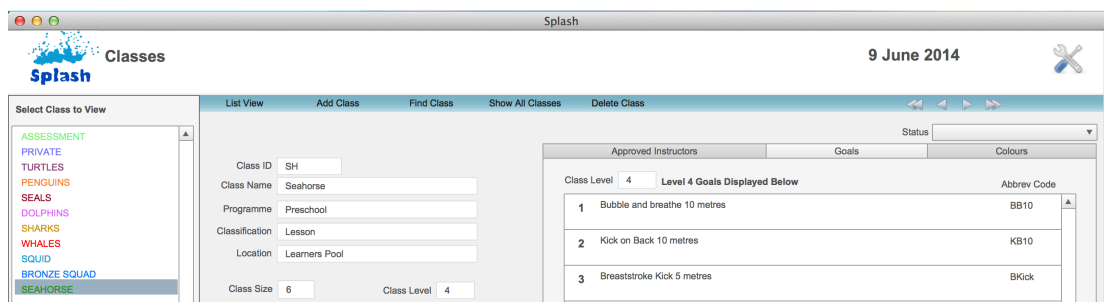
This close-up shows the 'Class Level' dropdown menu. The menu is open, displaying a list of options: -1 Assessment, 1 Level 1, 2 Level 2, 3 Level 3, 4 Level 4, 5 Level 5, 6 Level 6, and 7 Beginner Squad. The 'Seahorse' class name is visible in the background, along with the 'Display Colour' section showing Red, Green, and Blue color swatches.

7. Goals for this class will automatically appear when the class level is selected.
8. The information will be saved as soon as you select another class or exit this screen.

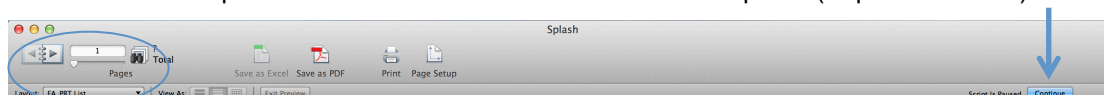
Printing a List of Class Goals

This report displays a list of the goals linked to the selected class. Access to this report is restricted to those who have access to report class information.

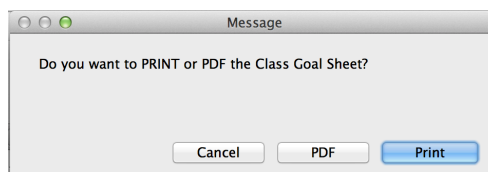
1. Click the **Preferences** tools on the top right of your screen.
2. Select **Classes**.
3. Using the portal on the left of the screen, click once on class you wish to print the goals for.
4. The portal row will be highlighted to indicate the active record. The information for the selected class will be displayed on the right of your screen.
5. Select **List of ...** from the Print menu and select **Class Goals** from the pop-out menu displayed.



6. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



7. The **Print Report** dialog will be displayed on your screen.



8. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Class Information for Dolphins (DOL)		
Program : School Age		
Classification : Lesson		
Level : Level 4		
Size : 4		
1	Bubble and breathe 10 metres	BB10
2	Kick on Back 10 metres	KB10
3	Breaststroke Kick 5 metres	BKick
4	Butterfly Arms 5 metres	FArms

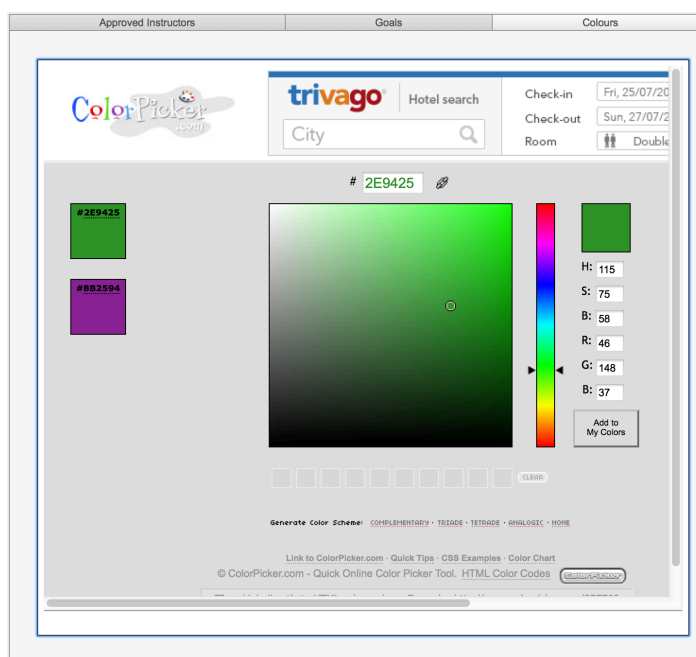
Defining the Colour of a Class

Each class can be represented as a different colour in the diary or list of sessions. This area of Splash is used to customise the colours that you wish to use.

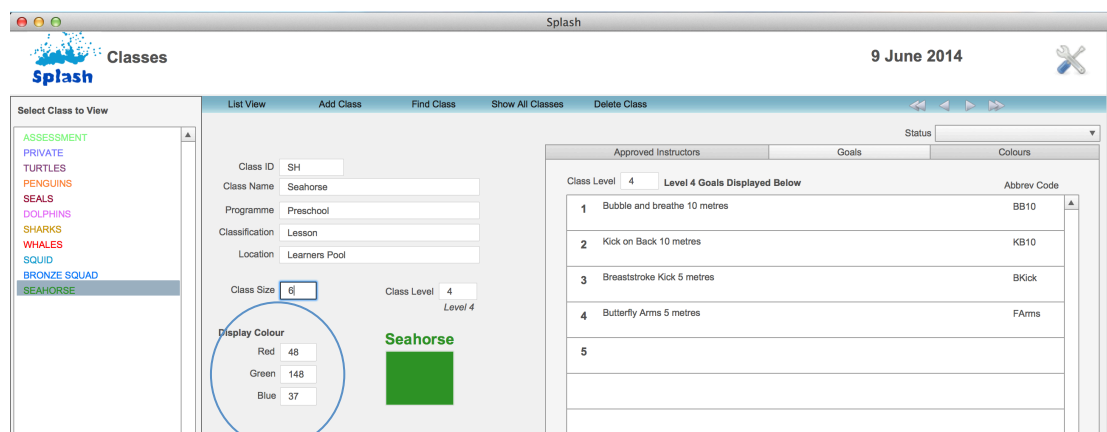
Colours are determined using the RGB colour palette. This means you need to enter 3 numbers one red value, one green value, and one blue value in order to display a colour. RGB values are any number between 0 and 255.

A colour picker has been added to Splash to help you identify effective screen colours.

The sample below shows green represented as R=46, G=148, and B=37.



1. Click the **Preferences** tools on the top right of your screen.
2. Select **Classes**.
3. Using the portal on the left of the screen, click once on class you wish to update.
4. The portal row will be highlighted to indicate the active record. The information for the selected class will be displayed on the right of your screen.



5. Simply enter the R G B numbers in the fields provided on your screen.
6. The colour sample will change to reflect the numbers you have entered.
7. The information will be saved as soon as you select another class or exit this screen.

Finding a Class

Using the Find Portal

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Classes**.
3. Using the portal on the left of the screen, click once on class you wish to update.
4. The portal row will be highlighted to indicate the active record. The information for the selected class will be displayed on the right of your screen.

The screenshot shows the 'Classes' management interface in the 'Splash' application. On the left, a 'Select Class to View' portal lists various categories like ASSESSMENT, PRIVATE, TURTLES, PENGUINS, SEALS, DOLPHINS, SHARKS, WHALES, SQUID, BRONZE SQUAD, and SEAHORSE. The 'SEAHORSE' category is selected. The main area displays the details for the 'Seahorse' class, including its ID (SH), name, programme (Preschool), classification (Lesson), location (Learners Pool), class size (6), and class level (4). A table on the right lists goals for Level 4, such as 'Bubble and breathe 10 metres' (BB10), 'Kick on Back 10 metres' (KB10), 'Breaststroke Kick 5 metres' (BKick), and 'Butterfly Arms 5 metres' (FArms).

Using the Find Command

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Classes**.
3. Click once on the **Find Class** button displayed in the blue stripe at the top of your screen.

This screenshot shows the 'Classes' management interface with the 'Find Class' button in the top navigation bar circled, indicating the next step in the process.

4. The **Search for a Class** dialog box will be displayed on your screen.

The 'Search for a Class' dialog box is shown, allowing users to search for a specific class. It includes input fields for Class ID, Class Name, Programme (set to Preschool), Classification, Location, Class Size, Display Colour (Red, Green, Blue), Cost of Session (Cost Method, Default Cost, DD Cost), and Comments. The 'Find Now' button is highlighted at the bottom right.

5. Enter the criteria for your find in the appropriate field/s.
6. Click the **Find Now** button.
7. If one record is located the record will be displayed on the Class entry screen.
If multiple records are located the found set will be displayed in the list view.

Updating Class Details

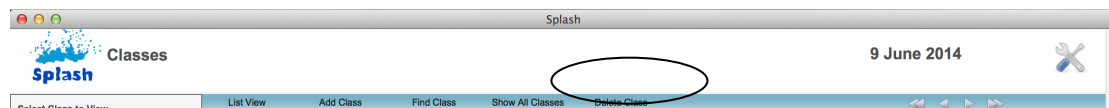
1. Use the **Finding a Class** button to locate the class record you wish to update.
2. If one record is located the record will be displayed on the Class entry screen.
3. Update any details as required.

Deleting a Class Record

Class records can be deleted from either the Class entry screen or the list view.

Deleting a Class from List View

1. Use the **Finding a Class** function to locate the class record you wish to delete.
2. When the correct class record is displayed in the list click once on the row containing the class you wish to delete.
3. Click once on the **Delete Class** button.



4. You will be asked to confirm you wish to delete the selected class.



Deleting a Class from the Class Entry Screen

1. Click the **Preferences** tools on the top right of your screen.
2. Select **Classes**.
3. Using the portal on the left of the screen, click once on class you wish to update.
4. The portal row will be highlighted to indicate the active record. The information for the selected class will be displayed on the right of your screen.
5. Click once on the **Delete Class** button.
6. You will be asked to confirm you wish to delete the selected class.



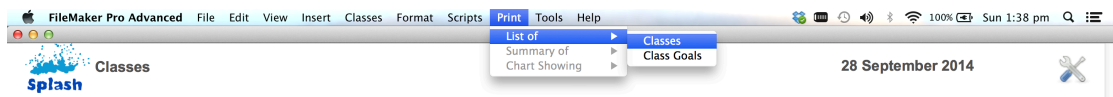
Printing Class Reports

You must be in the Classes module of Splash to print the following reports. All reports are generated from the Print menu.

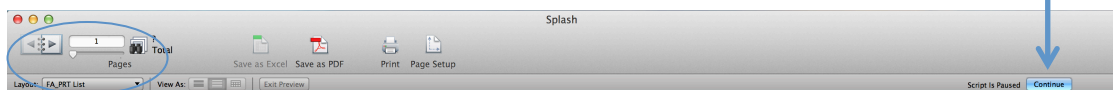
Printing a List of Classes

This report displays generic class information i.e. Class ID and Class name. Access to this report is restricted to those who have access to report class information.

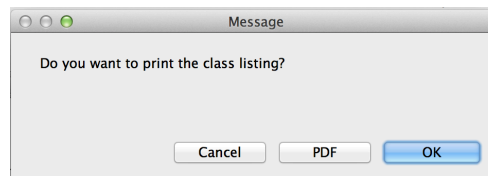
1. Use the **Finding a Class** function to locate the class record you wish to delete.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Classes** from the pop-out menu displayed.



6. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



7. The **Print Report** dialog will be displayed on your screen.



8. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

List of Classes

Class ID		Max Size	Cost	DD Cost	Level	Status
ASMT	Assessment	6	\$0.00	\$0.00	2 Level 2	
PRIV	Private	1	\$15.50		1 Level 1	Active
TUR	Turtles	8	\$15.00		1 Level 1	Active
PEN	Penguins	4	\$8.50		2 Level 2	Active
SEA	Seals	4	\$10.00		3 Level 3	Active
DOL	Dolphins	4	\$10.00	\$9.50	4 Level 4	Active
SHA	Sharks	6	\$10.00		5 Level 5	Active
WHA	Whales	10	\$10.00		6 Level 6	Active
SQI	squid	4	\$15.00		6 Level 6	Active
BRO	Bronze Squad	10	\$100.00	\$100.00	7 Beginner Squad	
SH	Seahorse	6			4 Level 4	

Defining Session Details

This module contains a schedule of all sessions, which either have been conducted, are being conducted, or are going to be conducted by your swim school. Generic class information (date, time, instructor, level, etc) is stored along with class size and the number of spaces remaining.

The Session Record

Each session record contains the following two sections:

Bookings – displays the generic information about the selected session (location, start date and time, instructor, and cost). It also includes a list of students with full term bookings or catchups for the selected session. Catchups and exits are colour coded for easy identification.

The screenshot displays the 'Sessions' module in the Splash application. The interface is divided into several sections:

- Header:** 'Sessions' logo, date '9 June 2014', and a 'Custom Reports' link.
- Filter By:** A sidebar on the left with filters for Class Name, Instructor, Term, and Year. A list of sessions is shown with columns for time, class name, and day.
- Session Details:** A central panel showing details for Class ID 'tur' and Session ID '1895'. It includes fields for Class Name ('Turtles'), Class Level ('2'), Maximum Size ('10'), Programme, Classification ('Lesson'), Start Date ('7/5/2014'), End Date ('8/7/2014'), Start Time ('9:00 AM'), Weekday ('Wednesday'), Term ('2'), Year ('2014'), No. of Sessions ('9'), Shift ('Morning'), Frequency ('Weekly'), and Location ('Learners Pool').
- Cost of Session:** A table showing Cost Method, Cost Per Session, Default Cost (\$10.00), DD Cost (\$10.00), Default Total (\$90.00), and DD Total (\$90.00).
- Instructor Details:** A section for the instructor 'Lynda Wightman' (LW), including a telephone number '04 234 4568' and a comments box.
- Bookings:** A table on the right showing a list of students with their bookings. The table has columns for Student Name, Time, Session ID, and Total Bookings (2). The list includes Jennifer Smith, Jessica Hargreaves, Bridgette Robinson, Robert Harper, Amelia Harper, denise taylor, and Jane White.
- Goals:** A section at the bottom right showing Maximum Size (10), Current Bookings (2), Active Catchups (2), and Current Spaces (6).

Catchups – located in the second tab card on the right of the screen. This area of sessions is dedicated to the display of catchup bookings. Lessons are colour coded as follows:

Green = Catchup Current Week

Orange = Future Catchup

Red = Past Catchup

The screenshot shows the 'Sessions' window with the 'Catchups' tab selected. The left sidebar contains a filter menu and a list of sessions. The main area is divided into three sections: Class Details, Sessions Details, and a Bookings table.

Class Details:

- Class ID: tur, Session ID: 1895
- Class Name: Turtles
- Class Level: 2, Maximum Size: 10
- Programme:
- Classification: Lesson

Sessions Details:

- Start Date: 7/5/2014, End Date: 8/7/2014
- Start Time: 9:00 AM, Weekday: Wednesday
- Term: 2, Year: 2014
- No. of Sessions: 9, Shift: Morning
- Frequency: Weekly
- Location: Learners Pool

Cost of Session:

- Cost Method: Cost Per Session
- Default Cost: \$10.00, DD Cost: \$10.00
- Default Total: \$90.00, DD Total: \$90.00

Instructor Details:

- Instructor: LW, Lynda Wightman
- Telephone: 04 234 4568

Bookings Table:

Student Name	Time	Phone	Date
Robert Harper	7_0m	04 236 4567	11/06/14
Bridgette Robinson	13_9m	04 478 2491	11/06/14
denise taylor	0_11m	04 236 9137	4/06/14
Amelia Harper	9_5m	04 236 4567	4/06/14
Jane White	10_2m	04 675 1432	28/05/14

Buttons: + Add Catchup

Waiting List – located in the third tab card on the right of the screen. This area of sessions is dedicated to display waitlisted students. This screen can be used add an additional waitlist student or to transfer a child directly from the waitlist into the selected session.

The screenshot shows the 'Sessions' window with the 'Waiting List' tab selected. The layout is similar to the previous screenshot, but the 'Bookings' table is replaced by a 'Waiting List' table.

Class Details:

- Class ID: tur, Session ID: 1895
- Class Name: Turtles
- Class Level: 2, Maximum Size: 10
- Programme:
- Classification: Lesson

Sessions Details:

- Start Date: 7/5/2014, End Date: 8/7/2014
- Start Time: 9:00 AM, Weekday: Wednesday
- Term: 2, Year: 2014
- No. of Sessions: 9, Shift: Morning
- Frequency: Weekly
- Location: Learners Pool

Cost of Session:

- Cost Method: Cost Per Session
- Default Cost: \$10.00, DD Cost: \$10.00
- Default Total: \$90.00, DD Total: \$90.00

Instructor Details:

- Instructor: LW, Lynda Wightman
- Telephone: 04 234 4568

Waiting List Table:

Date	Student Name	Phone	Notes	Actions
9/06/14	Jonathan Fairbrother	04 789 4568	Is moving to the area in June	Mark, Add, Remove
9/06/14	Jack McArthur	04 566 7894	Needs to move to the afternoon.	Add, Remove

Buttons: + Add Waitlist, Print

Comments – located in the fourth tab card on the right of the screen. This area of sessions is dedicated to the entry of comments. Comments can also be entered in the field at the lower centre of your screen.

The screenshot shows the 'Sessions' window in the Splash application. The 'Comments' tab is selected on the right-hand side. The interface includes a filter panel on the left, a central session details form, and a large text area for entering comments. The session details form shows Class ID 'tur', Session ID '1895', Class Name 'Turtles', Class Level '2', Maximum Size '10', Programme 'Lesson', and Classification 'Lesson'. The Sessions Details section shows Start Date '7/5/2014', End Date '8/7/2014', Start Time '9:00 AM', Weekday 'Wednesday', Term '2', Year '2014', No. of Sessions '9', Shift 'Morning', Frequency 'Weekly', and Location 'Learners Pool'. The Cost of Session section shows Cost Method 'Cost Per Session', Default Cost '\$10.00', DD Cost '\$10.00', Default Total '\$90.00', and DD Total '\$90.00'. The Instructor Details section shows Instructor 'LW Lynda Wightman' and Telephone '04 234 4568'. The Comments section has a text area with the placeholder 'Add a comment about the class here...'. The left filter panel shows a list of sessions with times and days, and a 'Browse' button at the bottom.

Goals – located in the final tab card on the right of the screen. This area of Splash displays a list of goals for the selected level. Each student enrolled in this session can be monitored against these goals before progressing to the next level. Goals cannot be amended or deleted in this screen. You must return to Class Levels to make any changes.

The screenshot shows the 'Sessions' window in the Splash application, with the 'Goals' tab selected on the right-hand side. The interface is similar to the previous screenshot, but the 'Goals' tab is active. The session details form shows Class ID 'tur', Session ID '1895', Class Name 'Turtles', Class Level '4', Maximum Size '10', Programme 'Lesson', and Classification 'Lesson'. The Sessions Details section shows Start Date '7/5/2014', End Date '8/7/2014', Start Time '9:00 AM', Weekday 'Wednesday', Term '2', Year '2014', No. of Sessions '9', Shift 'Morning', Frequency 'Weekly', and Location 'Learners Pool'. The Cost of Session section shows Cost Method 'Cost Per Session', Default Cost '\$10.00', DD Cost '\$10.00', Default Total '\$90.00', and DD Total '\$90.00'. The Instructor Details section shows Instructor 'LW Lynda Wightman' and Telephone '04 234 4568'. The Comments section has a text area with the placeholder 'Add a comment about the class here...'. The Goals section displays a list of goals for the selected level, including 'Bubble and breathe 10 metres' (BB10), 'Kick on Back 10 metres' (KB10), 'Breaststroke Kick 5 metres' (BKick), and 'Butterfly Arms 5 metres' (FArms). The left filter panel shows a list of sessions with times and days, and a 'Browse' button at the bottom.

Listing Session Records

Each record in your database can be displayed in either the entry screen or list view. List view will display all records in the found set – see the bottom left corner of the screen for the size of the current found set.

Splash

Sessions

9 June 2014

Sort By

Weekday

Detail View

Add Session

Find Session

Show All Sessions

Delete Session

Custom Reports

ID

Class ID & Name

Weekday

Start Date

Time

Instructor

Size

Booked

Spaces

Term

Year

Location

1840

DOL

Dolphins

Sunday

4/05/2014

9:00AM

BS

Barbara Smith

4

3

0

2

2014

Main Pool

1841

TUR

Turtles

Sunday

4/05/2014

9:00AM

BS

Barbara Smith

10

3

7

2

2014

Learners Pool

1842

PEN

Penguins

Friday

9/05/2014

9:00AM

bs

Barbara Smith

4

0

4

2

2014

Learners Pool

1843

DOL

Dolphins

Sunday

4/05/2014

2:00PM

BT

Brian Thomson

4

1

3

2

2014

Main Pool

1844

DOL

Dolphins

Sunday

4/05/2014

9:30AM

BT

Brian Thomson

4

3

1

2

2014

Main Pool

1845

SEA

Seals

Sunday

4/05/2014

1:00PM

BT

Brian Thomson

4

1

3

2

2014

Main Pool

1846

SHA

Sharks

Sunday

4/05/2014

1:00PM

BT

Brian Thomson

6

1

4

2

2014

Main Pool

1847

WHA

Whales

Sunday

4/05/2014

1:30PM

BS

Barbara Smith

10

0

10

2

2014

Main Pool

1848

DOL

Dolphins

Sunday

4/05/2014

1:30PM

BT

Brian Thomson

4

1

3

2

2014

Main Pool

1849

TUR

Turtles

Sunday

4/05/2014

9:30AM

BT

Brian Thomson

10

1

9

2

2014

Learners Pool

1861

WHA

Whales

Saturday

10/05/2014

1:30PM

BS

Barbara Smith

10

0

10

2

2014

Main Pool

1862

DOL

Dolphins

Saturday

10/05/2014

1:30PM

BT

Brian Thomson

4

0

4

2

2014

Main Pool

1863

TUR

Turtles

Saturday

10/05/2014

9:30AM

LW

Lynda Wightman

10

0

10

2

2014

Learners Pool

Displaying found set (71 out of 1127).

100 Browse

NB: Click the magnifier to the left of the Session ID to display the data entry screen.

NB: Display a list of students booked in any session by placing your mouse over the number of bookings.

Splash

Sessions

9 June 2014

Splash

Sessions

Sort By

Start Date

Detail View

Add Session

Find Session

Show All Sessions

Delete Session

Custom Reports

ID	Class ID & Name	Weekday	Start Date	Time	Instructor	Size	Booked	Spaces	Term	Year	Location
	1893 SEA Seals	Tuesday	6/05/2014	10:30AM	BS Barbara Smith	4	1	3	2	2014	Main Pool
	1894 SEA Seals	Tuesday	6/05/2014	11:00AM	BS Barbara Smith	4	0	4	2	2014	Main Pool
	1895 TUR Turtles	Wednesday	7/05/2014	9:00AM	LW Lynda Wightman	10	2	6	2	2014	Learners Pool
	1896 DOL Dolphins	Wednesday	7/05/2014	2:00PM	BT Brian Thomson	4	4	0	2	2014	Main Pool
	1897 DOL Dolphins	Wednesday	7/05/2014	9:30AM	BT Brian Thomson	4	0	4	2	2014	Main Pool
	1898 SEA Seals	Wednesday	7/05/2014	1:00PM	BS Barbara Smith	4	0	4	2	2014	Main Pool
	1899 SHA Sharks	Wednesday	7/05/2014	1:00PM	BT Brian Thomson	6	0	6	2	2014	Main Pool

Jennifer Smith (4_1m)

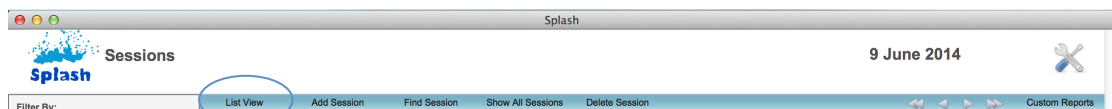
Jessica Hargreaves (12_9m)

Robert Harper (7_0m)

Bridgette Robinson (13_9m)

Displaying a List of Sessions

1. Click once on the **List View** button displayed in the blue stripe at the top of your screen.

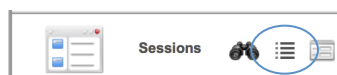


Filter By:	List View	Add Session	Find Session	Show All Sessions	Delete Session	Custom Reports
------------	-----------	-------------	--------------	-------------------	----------------	----------------

2. The Session List View screen will be displayed.

Displaying a List of Sessions (from outside the Session screen)

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Session List** icon

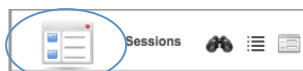


3. The Session List View screen will be displayed

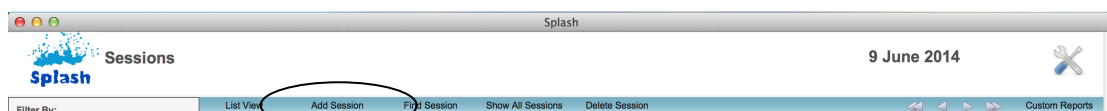
Entering a New Session

A new session record must be created for every session conducted by your school. A student booking cannot be made unless the relevant session already exists.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Session** icon



3. The Session data entry screen will be displayed
4. Click once on the **Add Session** button displayed in the blue stripe at the top of your screen.



5. The **Add New Session** dialog will be displayed.

A screenshot of the 'Add New Session' dialog box. The dialog has a title bar 'Add New Session' and a main area titled 'Enter New Session Details'. The form contains several sections: 'Class Details' with fields for Class ID (DOL), Session ID (8546), Class Name (Dolphins), Class Level (4), Programme (School Age), and Classification (Lesson); 'Sessions Details' with fields for Start Date (4/7/14), End Date, Start Time, Weekday (Friday), Term, Year (2014), No. of Sessions, Frequency (Weekly), and Location (Main Pool); 'Cost of Session' with fields for Cost Method (Cost Per Session), Default Cost (\$10.00), DD Cost (\$9.50), Default Total (\$0.00), and DD Total (\$0.00); 'Instructor Details' with fields for Instructor and Telephone; and a 'Comments' field. At the bottom are 'Cancel' and 'Done' buttons.

6. Complete as many details as possible in the Add New Session dialog. You must select a Class ID (from the drop-down menu provided), Start Date, End Date, Start Time, Term and number of sessions when creating a new record.
7. Select the Instructor ID from the menu provided – only instructors you have previously recorded as approved will be displayed in the list.

Instructor Details

Instructor

Telephone:

Comments

BS Barbara Smith
BT Brian Thomson
DS Dave Smith
TBA To Be Advised

- Click the **Done** button to save the information and return to the Session data entry screen.

Defining Comments for Display in the Daily Diary

- Use the **Finding a Session** function to locate the session record you wish to update.

Splash Sessions 9 June 2014

Filter By: All Class Name All Instructor 2 Term 2014 Year

Class ID tur Session ID 1895

Class Name Turtles

Class Level 2 Maximum Size 10

Programme

Classification Lesson

Sessions Details

Start Date 7/5/2014 End Date 8/7/2014

Start Time 9:00 AM Weekday Wednesday

Term 2 Year 2014

No. of Sessions 9 Shift Morning

Frequency Weekly

Location Learners Pool

Cost of Session

Cost Method Cost Per Session

Default Cost \$10.00 DD Cost \$10.00

Default Total \$90.00 DD Total \$90.00

Instructor Details

Instructor LW Lynda Wightman Telephone: 04 234 4568

Comments

Add a comment about the class here...

Previous Session ID: 1826

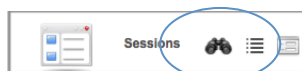
- Enter the details you wish to have displayed in the diary in the comments field of the session details screen.

Comments

Add a comment about the class here...

Finding a Session

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Session Find** icon



3. The **Search for a Session** dialog box will be displayed on your screen.

A screenshot of the 'Search for a Session' dialog box. The dialog has a title bar 'Search for a Session' and a 'Splash' button in the top right. It contains several search criteria sections: 'Session ID', 'Class ID', 'Previous Session ID', 'Class Name', 'Class Level', 'Programme', 'Classification', 'Sessions Details' (including Start Date, End Date, Start Time, Weekday, Term, Year, No. of Sessions, Shift, Frequency, Location), 'Cost of Session' (including Cost Method, Default Cost, DD Cost, Default Total, DD Total), 'Instructor Details' (Instructor), and 'Comments'. On the right side, there is a 'Current Bookings' section with fields for Maximum Size, Current Bookings, Catches Current Week, Current Spaces, Catches in Future, and Waitlisted Students. At the bottom, there are buttons for 'Cancel', 'New Request', 'Omit Records', 'Constrain Set', 'Extend Set', and 'Find Now'.

4. Enter the criteria for your find by typing your request in the corresponding field/s.
5. Click the **Find Now** button.
6. If one record is located the record will be displayed on the Session entry screen. If multiple records are located the found set will be displayed in the list view.

NB: See *Advanced Find Techniques* within this guide for assistance with Constraining or Extending the found set.

Updating Session Details

1. Use the **Finding a Session** function to locate the student record you wish to update.
2. When the correct session screen is displayed simply overwrite any of the information to update the information that has been stored.

NB: Information in the updated session will automatically be copied to any current bookings.

Adding a Student Booking

Student bookings are normally made in the Daily Diary however you can also add students to a session within the Bookings tab card on the session module.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Session** icon



3. The Session data entry screen will be displayed, enter the criteria for the session you wish to review in the filter fields at the top of the portal list on the left of your screen.
4. Select the portal row that contains the class you wish to book your student in to.
5. The portal row will be highlighted to indicate the active record. The details of the selected session will be displayed on the right of your screen.

1. The right side of the screen will display a list of students currently booked in the class.
2. Click the **Add Booking** button at the lower centre of your screen to display the **Select a Student Portal**.

Select a Student

Enter all or part of the student name to display fewer records.
Select the family name from the list below...

Filter:

Name	Age	Telephone	Address	Class
Buchanan, Gareth	10_2m	0272222082	29 Victoria St, Khandallah, Wellington 4007	Dolphins
gill, james	8_3m			Turtles
Hargreaves, Gregory	9_7m	0272222082	24 lane St, Wallaceville, Upper Hutt 5014	Turtles
Patterson, Gaylene	13_7m	027 2222082	76 Kent St, Newlands, Wellington 4008	Dolphins
Taylor, Georgia	8_10m	04 236 9137	79 Main St, Tawa, Wellington 4010	Dolphins

Cancel

3. Your cursor will be placed in the filter field; begin typing the student first name or last name. As you type list of all students matching the name entered will be displayed on your screen.
4. To select a student for your booking, simply click once on the line displaying the correct student name.
5. A completed Booking entry screen will be displayed.

Create New Booking

Enter New Booking Details

Name:
 Telephone:
 Address:
 Age: Gender: # Bookings This Term:

Session Details

Session ID: Class ID: Term:
 Class Name: Year:
 Instructor: Payment Required By:
 Location:
 Start Time: No. of Sessions:
 Start Date: End Date: Weekday:

Cost of Lessons **Direct Debit** **Comments**

Cost Method: @ Initial Cost:
 Discount Rate: Discount Type: Discount Applied:
 Credit Due: Credit Taken: Credit Applied:
 Value of Free Lessons:
 Payment by Direct Debit: Balance Due:

Cancel Done

6. If the student is not starting on the first day of term, update the start date and the number of session.

7. Add a discount rate or credit value if required and click the **Done** button.
8. The information will be saved and you will be returned to the Session details screen.
9. The students name will appear in the list of bookings on the right of your screen. Your system defaults will determine whether a confirmation letter is sent automatically.

Splash Sessions 9 June 2014

Filter By: All Class Name All Instructor 2 Term 2014 Year

☒ Monday ☐ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☐ Sunday

9:00AM TURTLES Wed
9:30AM DOLPHINS Wed
1:00PM SEALS Wed
1:00PM SHARKS Wed
1:30PM WHALES Wed
1:30PM DOLPHINS Wed
9:30AM TURTLES Wed
10:00A TURTLES Wed
10:30A TURTLES Wed
9:30AM SEALS Wed
10:30A SEALS Wed
11:00A SEALS Wed
9:00AM PENGUINS Fri
9:00AM TURTLES Fri
2:00PM DOLPHINS Fri
9:30AM DOLPHINS Fri
1:00PM SEALS Fri
1:00PM SHARKS Fri
1:30PM WHALES Fri
1:30PM DOLPHINS Fri
9:30AM TURTLES Fri
10:00A TURTLES Fri
10:30A TURTLES Fri
9:30AM SEALS Fri
10:30A SEALS Fri

Class ID: dol Session ID: 1896
Class Name: Dolphins
Class Level: 5 Maximum Size: 4
Programme: Lesson
Classification: Lesson

Sessions Details
Start Date: 7/5/2014 End Date: 8/7/2014
Start Time: 2:00 PM Weekday: Wednesday
Term: 2 Year: 2014
No. of Sessions: 9 Shift: Afternoon
Frequency: Weekly
Location: Main Pool

Cost of Session
Cost Method: Cost Per Session
Default Cost: \$10.00 DD Cost: \$10.00
Default Total: \$90.00 DD Total: \$90.00

Instructor Details
Instructor: BT Brian Thomson
Telephone: 04 567 3456

Comments

Previous Session ID: 1827

Bookings Total Standard Bookings (1)
Gaylene Patterson 13_7m 1896x0 BT 1

Maximum Size: 4
Current Bookings: 1
Active Catchups: 0
Current Spaces: 3

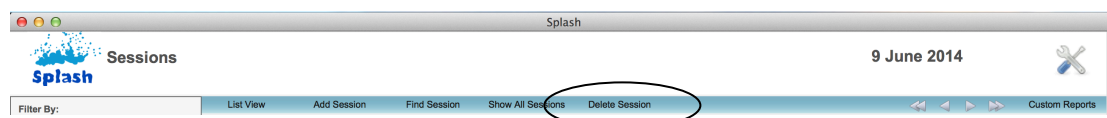
+ Add Booking

Deleting a Session Record

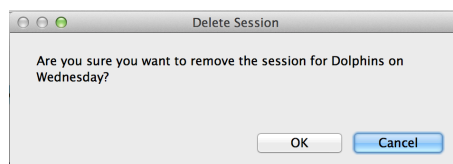
Session records can be deleted from either the Session entry screen or the list view. A session that contains either bookings or waitlisted students cannot be deleted.

Deleting a Session from List View

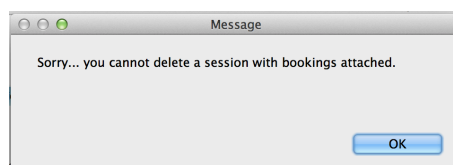
1. Use the **Finding a Session** function to locate the session record you wish to delete.
2. When the correct session is displayed on your screen click once on the row containing the relevant session record.
3. Click once on the **Delete Session** button displayed in the blue stripe at the top of your screen.



3. A dialog will be displayed asking you to confirm the session record should be deleted.



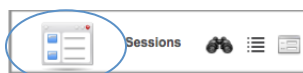
4. Click **OK** to delete the record or **Cancel** to return to the session screen without making a change.



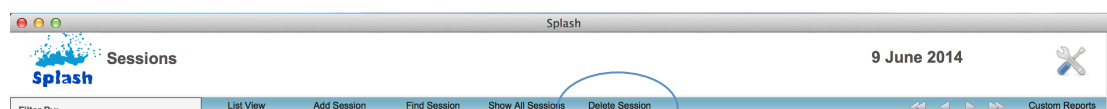
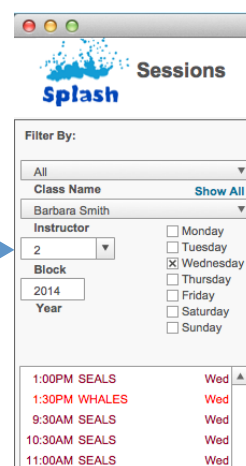
NB: You cannot delete a session with bookings or waitlisted students attached.

Deleting a Session from the Session Entry Screen

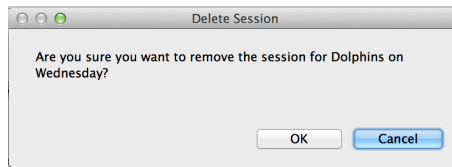
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Session** icon



3. The Session data entry screen will be displayed, enter the criteria for the session you wish to remove in the filter fields at the top of the portal list on the left of your screen.
4. Using the portal on the left of the screen, click once on session you wish to delete.
5. The portal row will be highlighted to indicate the active record. The details of the selected session will be displayed on the right of your screen.
6. Click once on the **Delete Session** button.



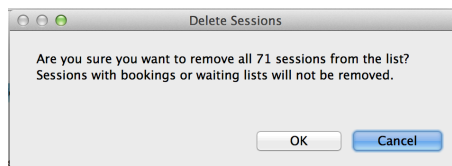
7. You will be asked to confirm the selected session is to be deleted.



Deleting a Group of Sessions

This command attempts to delete all sessions in the Found Set. Once again, sessions with bookings or waitlisted students cannot be deleted.

1. Use the **Finding a Session** function to locate the sessions you wish to delete.
2. When the correct sessions are displayed on your screen select **Delete Found Sessions** from the Sessions menu.
3. You will be asked to confirm you wish to delete the selected sessions. If you click OK the command cannot be reversed.



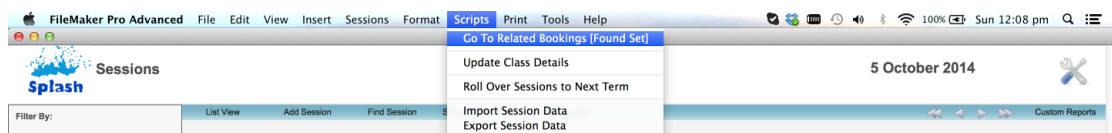
NB: Sessions with bookings attached will not be deleted, however all remaining sessions in the found set will be removed.

Go to Related Bookings [Found Set]

There will be times when you need to locate all the students in the found set of sessions. This command works with the found set of sessions. It locates all the bookings for the found sessions and displays them in a list within the booking module.

You might use this feature if you need to contact all the students who swim at a particular level or swim with a particular instructor on a specified day.

1. Use the **Finding a Session** function to locate the required sessions.
2. When the correct sessions are displayed on your screen select **Go to Related Bookings [Found Set]** from the Scripts menu.



3. Splash will navigate to the Bookings list view, a list of all related bookings will be displayed on the screen.

A screenshot of the Splash Bookings list view. It shows a table of bookings with columns for ID, Student Name, Age, Class Name, Weekday, Start, Time, Instructor, Block, Year, and Location. The table is filtered for Wednesday, 9/7/2014.

ID	Student Name	Age	Class Name	Weekday	Start	Time	Instructor	Block	Year	Location
85	Corey Morrison	12_6m	Seals	Wednesday	9/7/2014	1:00PM	Brian Thomson	3	2014	Main Pool
138	Craig King	6_2m	Dolphins	Wednesday	9/7/2014	2:30PM	Barbara Smith	3	2014	Main Pool
103	Gareth Buchanan	10_6m	Sharks	Wednesday	9/7/2014	1:00PM	Brian Thomson	3	2014	Main Pool
97	Gaylene Patterson	13_6m	Dolphins	Wednesday	9/7/2014	1:30PM	Dave Smith	3	2014	Main Pool
71	Georgia Taylor	9_2m	Seals	Wednesday	9/7/2014	10:30AM	Barbara Smith	3	2014	Main Pool
47	Hayden Hughson	9_2m	Seals	Wednesday	9/7/2014	10:30AM	Barbara Smith	3	2014	Main Pool
61	Jack McArthur	11_11	Dolphins	Wednesday	9/7/2014	1:30PM	Dave Smith	3	2014	Main Pool

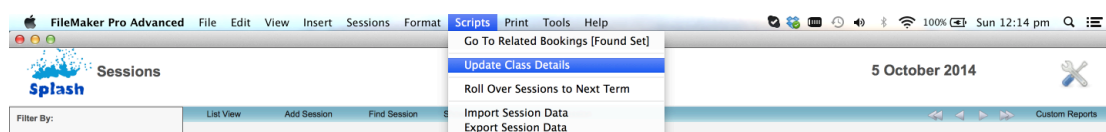
Update Class Details

When you first create a session, information is copied from the Class file. Class name, maximum size, cost, level, programme and classification are all copied to the session you are creating. If you have created new sessions and then need to update the default class information use this command. It is most often used after a rollover when there has been a price change.

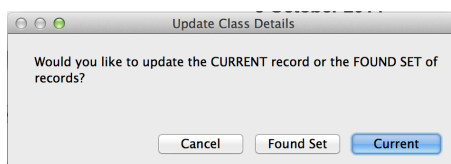
Class details can be updated for a single session or for all sessions in the found set.

Updating Class Details for the Current Record

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Session** icon
3. The Session data entry screen will be displayed, enter the criteria for the session you wish to update in the filter fields at the top of the portal list on the left of your screen.
4. Using the portal on the left of the screen, click once on session you wish to update.
5. The portal row will be highlighted to indicate the active record. The details of the selected session will be displayed on the right of your screen.
6. Go to the Scripts menu, select **Update Class Details**.

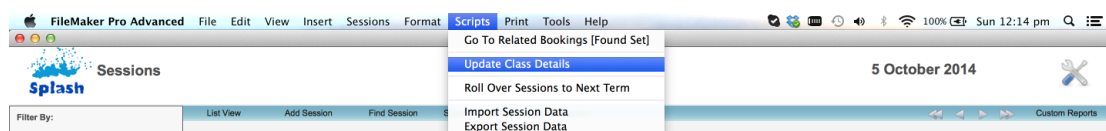


7. The Update Class Details dialog will be displayed on your screen. Click once on the **Current** button.

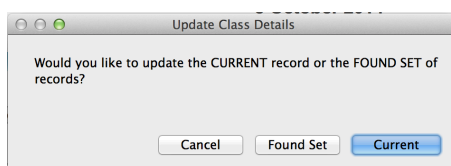


Updating Class Details for the Found Set

1. Use the **Finding a Session** function to locate the required sessions.
2. When the correct sessions are displayed on your screen select **Update Class Details** from the Scripts menu.

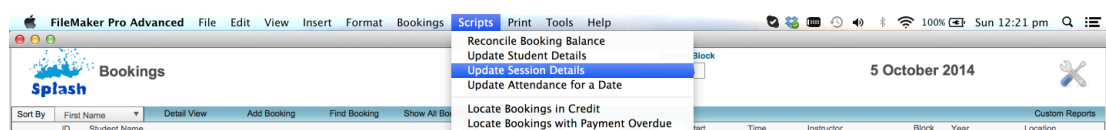


3. The Update Class Details dialog will be displayed on your screen. Click once on the **Found Set** button.



NB: If there are bookings attached to the selected sessions also perform the following:

1. Select **Go to Related Bookings [Found Set]** from the Scripts menu.
2. Splash will navigate to the Bookings list view, a list of all related bookings will be displayed on your screen.



3. The Update Session Details dialog will be displayed on your screen. Click once on the OK button.

Rollover Current Term Sessions

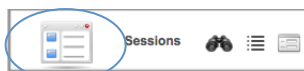
This command enables you to copy your existing timetable to the next term. **If you are unsure about this process please make a backup of your Splash Data file before you begin.**

NB: You may elect to perform a find on the term you are copying, taking note of the number of sessions. This number will be confirmed during the rollover process.

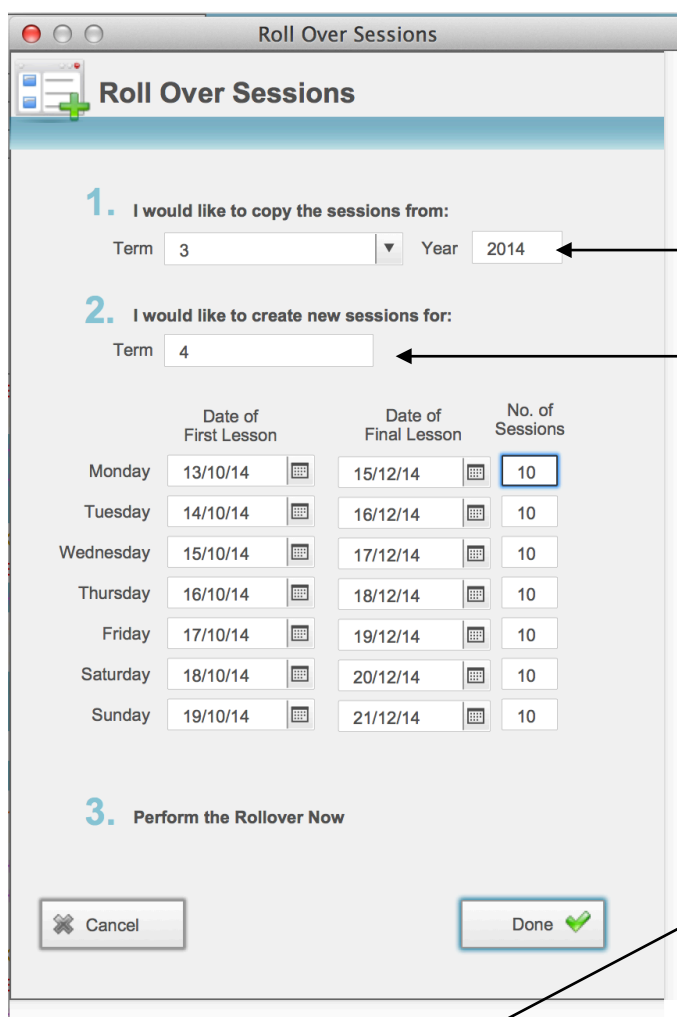
Rollover Current Term Sessions

Two key processes are performed during the rollover; the selected term sessions are copied and the new sessions are created. At no time during the rollover is any information overwritten. At the end of the process you will have your original timetable as well as a copy of your new timetable.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Session** icon



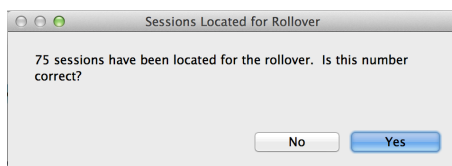
1. Go to the **Scripts** menu to select **Rollover Sessions to Next Term**.
2. The **Rollover Sessions** dialog box will be displayed on your screen.
3. At Step 1 of the dialog you are required to enter the Term/Block and Year you wish to rollover (your current term).



	Date of First Lesson	Date of Final Lesson	No. of Sessions
Monday	13/10/14	15/12/14	10
Tuesday	14/10/14	16/12/14	10
Wednesday	15/10/14	17/12/14	10
Thursday	16/10/14	18/12/14	10
Friday	17/10/14	19/12/14	10
Saturday	18/10/14	20/12/14	10
Sunday	19/10/14	21/12/14	10

4. At Step 2 enter the name of the Term/Block that you would like to create.
5. Enter the start date and end dates for each weekday of the new block. After entering the Monday dates Splash will automatically fill the remaining dates. Amend any date, which is not displayed correctly.

6. Enter the number of sessions that will be conducted during the block for each day of the week.
7. Click the **Done** button.
8. Splash will display a dialog confirming the number of sessions that have been located for the rollover. Click **Yes** to continue, or **No** to exit the rollover.



9. Splash will now export the selected sessions and reimport them as a copy for next term. When this process is complete the new timetable will be displayed on your screen. Each record will contain with the same weekday, time, and instructor as was defined in the term you have copied. The start date and term/year fields will be updated to display the details of the coming term.

You have now successfully rolled over from one term to the next. If you wish to copy your bookings as well please see the instructions for "Rolling Over Bookings to Next Term".

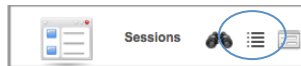
Importing Session Data

When you import data, you're bringing data from another file into Splash. When you import data into an existing FileMaker Pro file, you can:

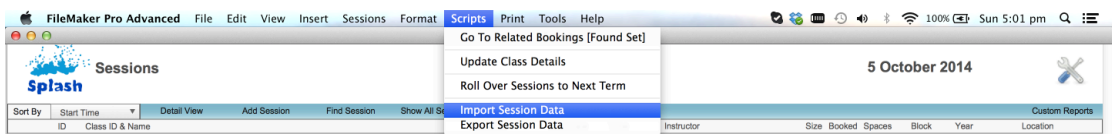
- add new records from the source file
- update records with information from the source file
- update matching records with information from the source file

Importing Records from Excel

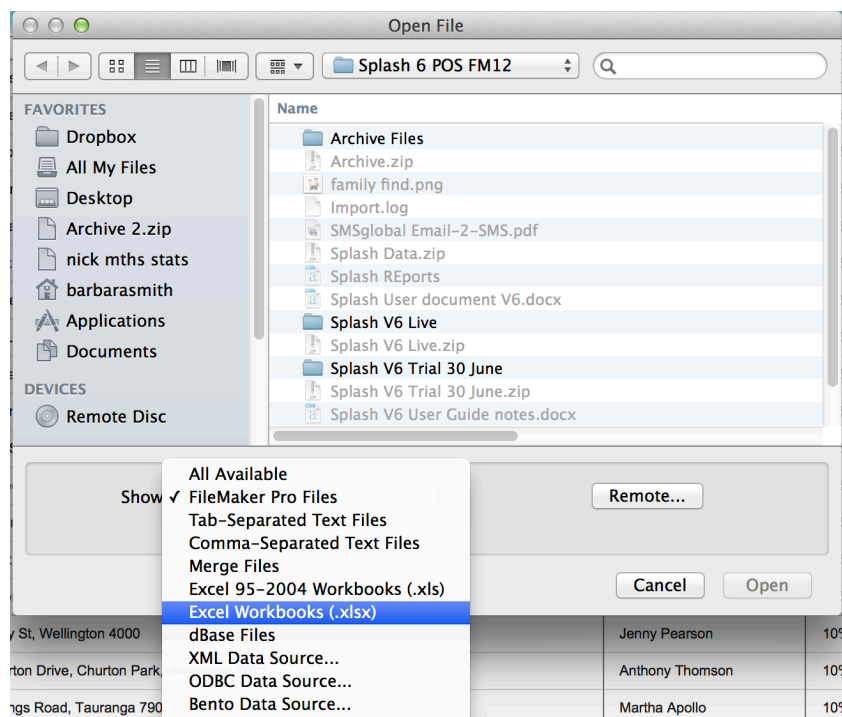
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Session List** icon



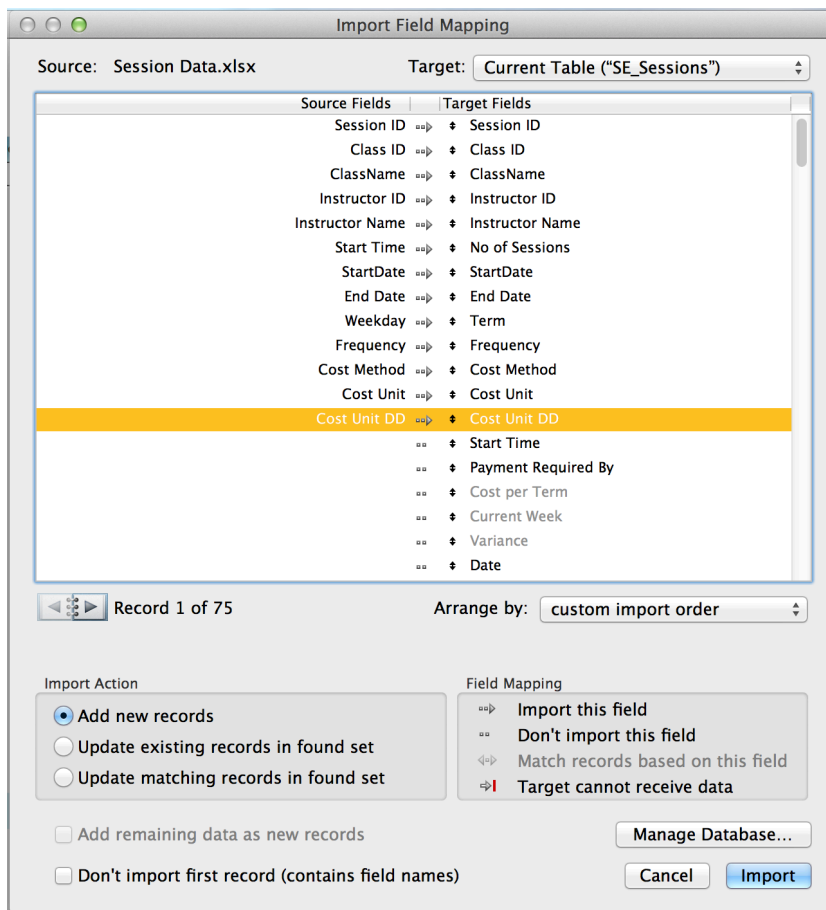
3. The Session List View screen will be displayed.
4. Select **Import Session Data** from the **Scripts** menu.



5. The **Open File** dialog will be displayed on your screen.
6. Locate the file containing the data you wish to import and click the **Open** button.



7. The Import Field Mapping dialog will be displayed on your screen.



8. In the **Import Action** area, choose the type of import to perform.

To add new records to the end of the target file – select **Add New Records**



To update the found set of records in the target file with the records you're importing – select **Update existing records in found set**.

To update data in the target file with the data from matching records in the source – select **Update matching records in the found set**.

9. If the first record of the data you're importing contains field names (column headings) instead of data, select **Don't import first record (contains field names)**.

Selecting **Don't import first record (contains field names)** skips the first record during import.

10. Drag fields in the Target Field column to align with fields in the Source Field column to indicate where data will be imported or updated.

To align a field, move the pointer over the  icon next to a target field name in the list. When the pointer changes to a double arrow , drag the field to a new location.

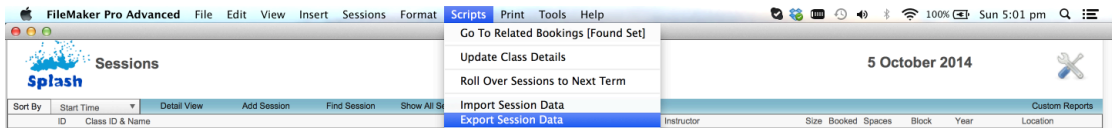
11. When all fields have been aligned correctly, click the **Import** button.

Exporting Session Data

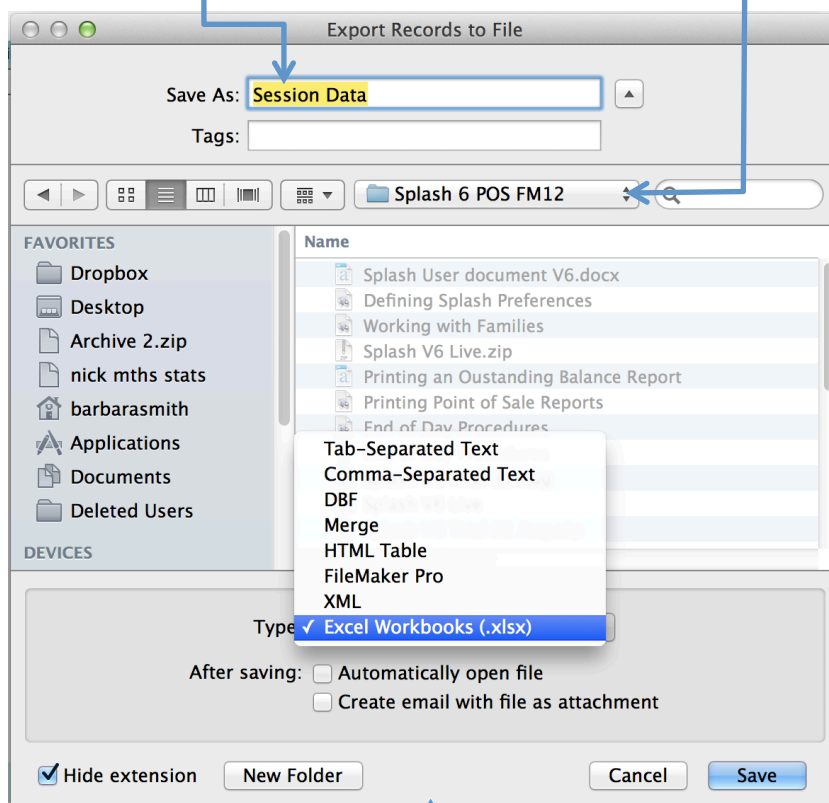
You can export Splash data to a new file and then open it in another application. For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

Exporting Records to Excel

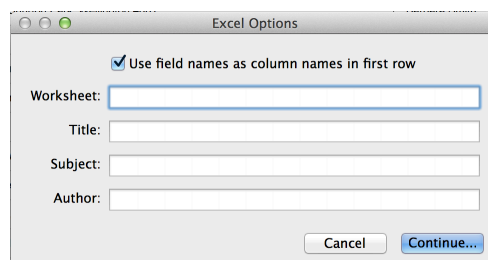
1. Use the **Finding a Session** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Session Data** from the **Scripts** menu.



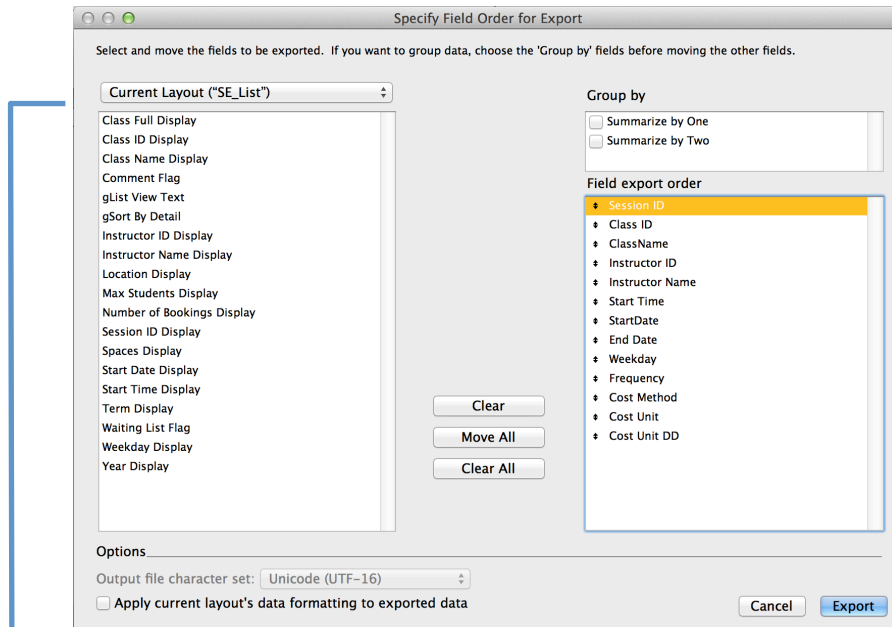
4. The **Export Records to File** dialog will be displayed on your screen.
5. Enter the name you wish to call your file and choose a location to store the file.



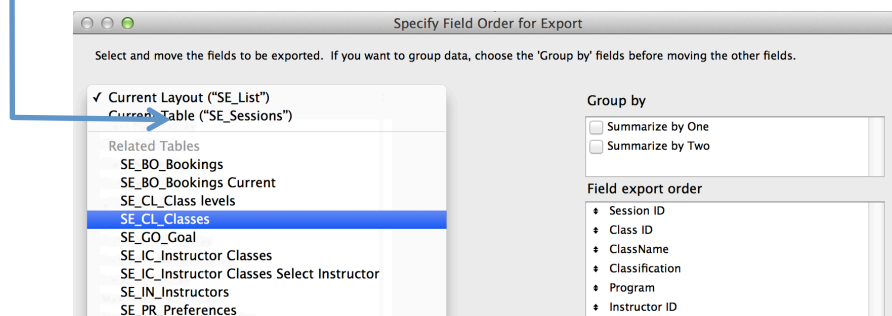
6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



8. The **Specify Field Order for Export** dialog will be displayed on your screen. Use this dialog to indicate the order of the fields in which Splash will export the data.
9. All fields displayed in the **Field Export Order** list will be exported.
10. To move a field to the **Field Export Order** simply double-click the field name on the left of the screen.



11. To include a related field choose the name of the related table from the list in the upper left of the dialog, then double-click the required field.



12. When all the required fields are displayed in the Field Export Order list click the **Export** button.
13. The Excel file will be saved to your computer ready for use.

Session ID	Class ID	Class Name	Instructor ID	Instructor Name	Start Time	Start Date	End Date	Weekday	Frequency	Cost Method
7500 dol		Dolphins	BS	Barbara Smith	14:00:00	08/07/2014	27/09/2014	Tuesday	Weekly	Cost Per Session
7513 dol		Dolphins	BS	Barbara Smith	14:30:00	09/07/2014	28/09/2014	Wednesday	Weekly	Cost Per Session
7525 SHA		Sharks	BS	Barbara Smith	06:30:00	11/07/2014	30/09/2014	Friday	Weekly	Cost Per Session
7466 DOL		Dolphins	BS	Barbara Smith	09:30:00	13/07/2014	02/10/2014	Sunday	Daily	Cost Per Session
7457 DOL		Dolphins	BS	Barbara Smith	09:00:00	13/07/2014	02/10/2014	Sunday	Weekly	Cost Per Session
7459 PEN		Penguins	BS	Barbara Smith	09:00:00	11/07/2014	30/09/2014	Friday	Weekly	Cost Per Session
7464 wha		Whales	BS	Barbara Smith	13:30:00	13/07/2014	02/10/2014	Sunday	Weekly	Cost Per Session
7467 tur		Turtles	BS	Barbara Smith	10:00:00	13/07/2014	02/10/2014	Sunday	Weekly	Cost Per Session
7468 tur		Turtles	BS	Barbara Smith	10:30:00	13/07/2014	02/10/2014	Sunday	Weekly	Cost Per Session
7470 sea		Seals	BS	Barbara Smith	10:30:00	13/07/2014	02/10/2014	Sunday	Weekly	Cost Per Session
7471 sea		Seals	BS	Barbara Smith	11:00:00	13/07/2014	02/10/2014	Sunday	Weekly	Cost Per Session
7473 PEN		Penguins	BS	Barbara Smith	09:00:00	12/07/2014	01/10/2014	Saturday	Weekly	Cost Per Session

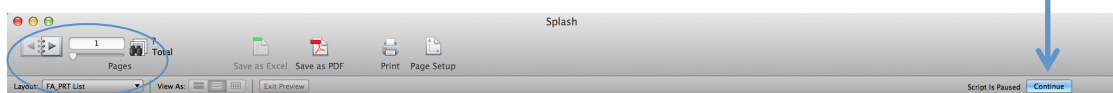
Printing Session Reports

You must be in the Sessions module of Splash to print the following reports. All reports are generated from the Print menu.

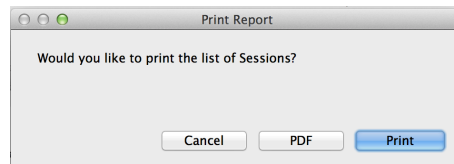
Printing a List of Sessions

This report provides a printed list of the found set of sessions. This report displays many of the same details and the session list view.

1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Sessions** from the pop-out menu displayed.
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.



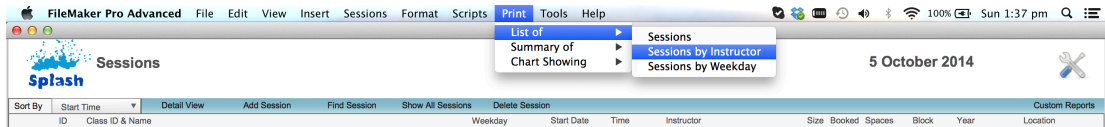
6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

List of Sessions							
Weekday	Time	Session	Class Name	Instructor	Class Size	Bookings	Spaces
Wednesday	9:00 AM	7038	Assessment	Barbara Smith	6	0	6
Tuesday	9:00 AM	1771	Seals	Barbara Smith	4	3	1
Tuesday	10:30 AM	1772	Turtles	Dave Smith	8	3	5
Tuesday	9:00 AM	1773	Penguins	Barbara Smith	4	0	4
Tuesday	2:00 PM	1774	Dolphins	Brian Thomson	4	0	4
Tuesday	9:00 AM	1775	Seals	Dave Smith	4	3	1
Tuesday	1:00 PM	1776	Seals	Brian Thomson	4	2	2
Tuesday	1:00 PM	1777	Sharks	Brian Thomson	6	1	5
Tuesday	1:30 PM	1778	Whales	Barbara Smith	10	1	9
Tuesday	1:30 PM	1779	Dolphins	Brian Thomson	4	1	3
Tuesday	9:30 AM	1780	Turtles	Lynda Wightman	8	1	7
Wednesday	10:00 AM	1781	Turtles	Lynda Wightman	8	0	8
Tuesday	10:30 AM	1782	Turtles	Lynda Wightman	8	1	7
Tuesday	10:30 AM	1783	Seals	Barbara Smith	4	4	0

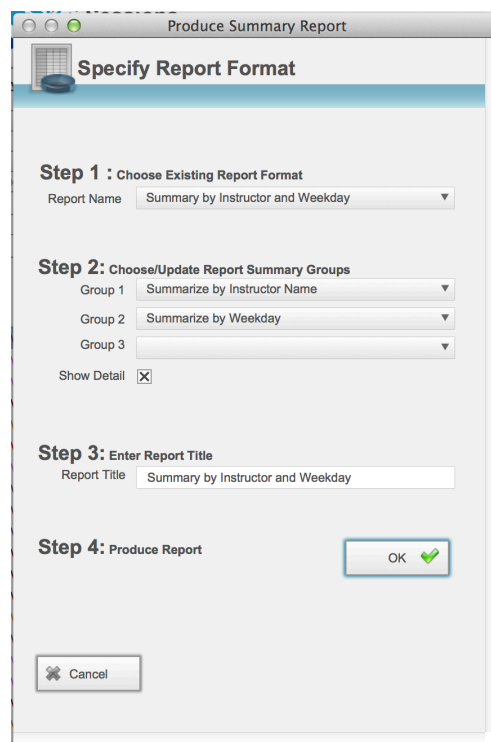
Printing a List of Sessions by Instructor

This report displays the occupancy rates and total number of bookings received for each session for a selected day. The information in this report is grouped by Instructor and Weekday.

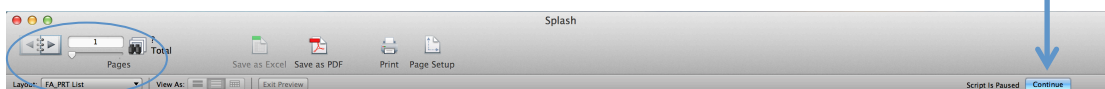
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Sessions by Instructor** from the pop-out menu displayed.



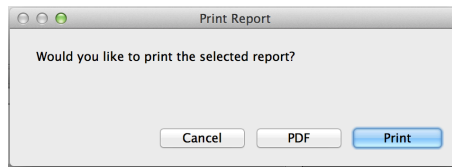
4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary by Instructor and Weekday
Step 2 = Group 1 set to Summarize by Instructor,
Group 2 set to Summarize by Weekday
Step 3 = Report Name set to Summary by Instructor and Weekday
6. Amend any of the above steps or include additional grouping options at Step 2 and click the **OK** button.



7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



8. The **Print Report** dialog will be displayed on your screen.



9. Click **OK** to print the report or Cancel to return to your original screen without printing.

Print Report by Instructor (Show Detail)

When the Summary Report dialog is displayed on your screen you have the choice to include or exclude detail in the report. The sample below shows the report when Show Detail is selected.

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Instructor and Weekday									
Barbara Smith				458	319	0	2140	0.7	16%
Friday				32	8	0	168	0.3	6%
1:30 PM	Fri	Whales	BS	0			10		
10:30 AM	Fri	Seals	BS	0			4		
11:00 AM	Fri	Seals	BS	0			4		
6:30 AM	Fri	Sharks	BS	0			6		
9:00 AM	Fri	Penguins	bs	0			4		
1:30 PM	Fri	Whales	BS	0			10		
9:30 AM	Fri	Seals	BS	1			3		

Print Report by Instructor (No Detail)

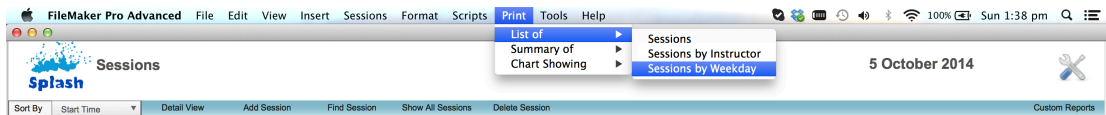
When the Summary Report dialog is displayed on your screen you have the choice to include or exclude detail in the report. The sample below shows the report when Show Detail is NOT selected.

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Instructor and Weekday									
Barbara Smith				458	319	0	2140	0.7	16%
Friday				32	8	0	168	0.3	6%
Monday				59	108	0	236	1.8	44%
Saturday				75	11	0	391	0.1	4%
Sunday				114	76	0	532	0.6	14%
Thursday				50	1	0	259	0.0	1%
Tuesday				45	34	0	186	0.7	17%
Wednesday				83	81	0	368	0.9	21%

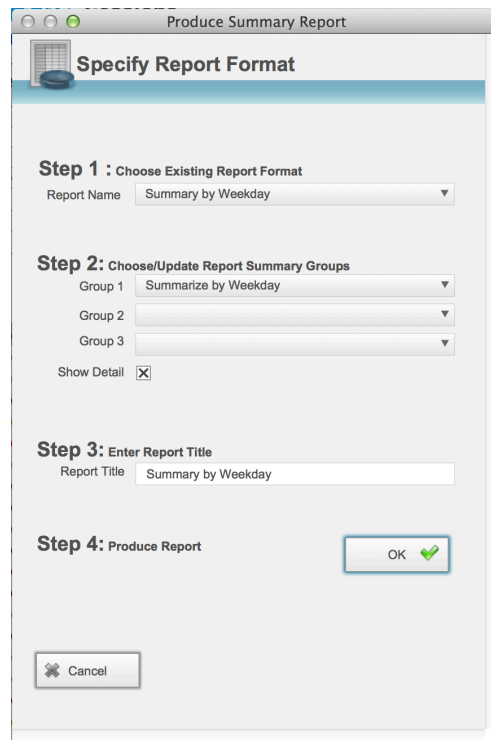
Printing a List of Sessions by Weekday

This report displays the occupancy rates and total number of bookings received for each session for a selected day. The information in this report is grouped by Weekday.

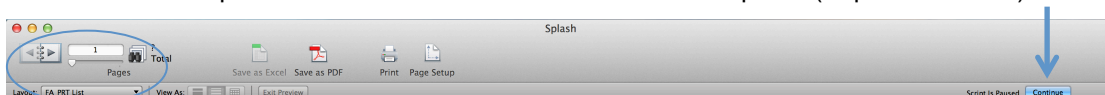
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Sessions by Weekday** from the pop-out menu displayed.



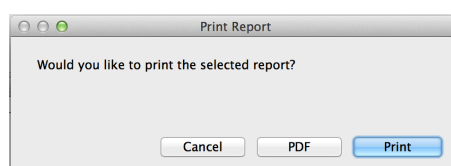
4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary by Weekday
Step 2 = Group 1 set to Summarize by Weekday,
Step 3 = Report Name set to Summary by Weekday
6. Amend any of the above steps or include additional grouping options at Step 2 and click the **OK** button.



7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



8. The **Print Report** dialog will be displayed on your screen.



9. Click **OK** to print the report or Cancel to return to your original screen without printing.

Print Report by Weekday (Show Detail)

When the Summary Report dialog is displayed on your screen you have the choice to include or exclude detail in the report. The sample below shows the report when Show Detail is selected.

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Weekday									
Friday				93	32	0	505	0.3	8%
	1:00 PM	Fri	Sharks	BT	0		6		
	1:30 PM	Fri	Whales	BS	0		10		
	1:30 PM	Fri	Dolphins	BT	0		4		
	9:30 AM	Fri	Turtles	LW	0		8		
	10:00 AM	Fri	Turtles	LW	0		8		
	10:30 AM	Fri	Turtles	LW	0		8		
	9:30 AM	Fri	Seals	ds	0		4		
	10:30 AM	Fri	Seals	BS	0		4		
	11:00 AM	Fri	Seals	BS	0		4		
	6:30 AM	Fri	Sharks	BS	0		6		
	9:00 AM	Fri	Penguins	bs	0		4		

Print Report by Weekday (No Detail)

When the Summary Report dialog is displayed on your screen you have the choice to include or exclude detail in the report. The sample below shows the report when Show Detail is NOT selected.

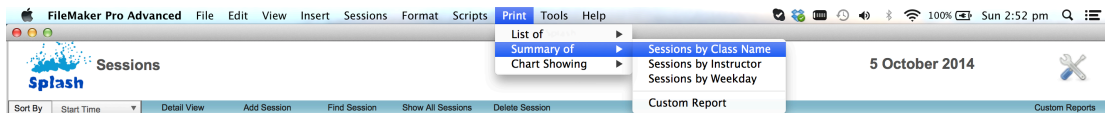
Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Weekday									
Friday				93	32	0	505	0.3	8%
Monday				148	274	0	624	1.8	38%
Saturday				218	66	0	1260	0.3	6%
Sunday				242	164	0	1258	0.6	13%
Thursday				134	4	0	838	0.0	1%
Tuesday				86	63	0	442	0.6	14%
Wednesday				206	244	2	1021	1.1	23%

Printing a Summary of Sessions by Class Name

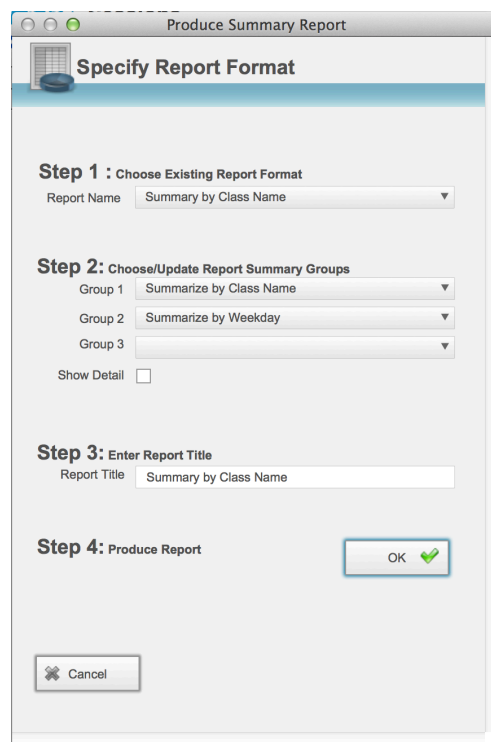
This report displays the average class size, total number of bookings, and spaces remaining for each class type on a selected day.

The information in this report is grouped by Class Name and Weekday.

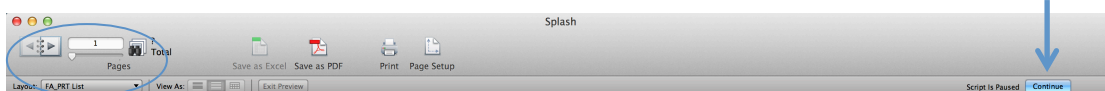
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Sessions by Class Name** from the pop-out menu displayed.



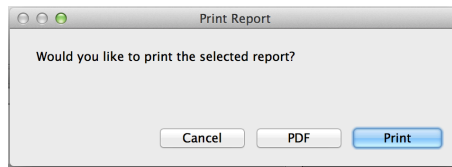
4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary by Instructor and Weekday
Step 2 = Group 1 set to Summarize by Instructor,
Group 2 set to Summarize by Weekday
Step 3 = Report Name set to Summary by Instructor and Weekday
6. Amend any of the above steps or include additional grouping options at Step 2 and click the **OK** button.



7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



8. The **Print Report** dialog will be displayed on your screen.



9. Click **OK** to print the report or Cancel to return to your original screen without printing.

Print Report by Class Name (Show Detail)

When the Summary Report dialog is displayed on your screen you have the choice to include or exclude detail in the report. The sample below shows the report when Show Detail is selected.

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Class Name									
Dolphins				22	27	0	64	1.1	27%
Friday				3	2	0	10	0.7	17%
2:00 PM	Fri	Dolphins	BT	2			2		
9:30 AM	Fri	Dolphins	BS	0			4		
1:30 PM	Fri	Dolphins	BT	0			4		
Saturday				5	2	0	18	0.4	10%
9:30 AM	Sat	Dolphins	BT	1			3		
2:00 PM	Sat	Dolphins	BT	1			3		
9:30 AM	Sat	Dolphins	BT	0			4		
1:30 PM	Sat	Dolphins	BT	0			4		
9:30 AM	Sat	Dolphins	BS	0			4		

Print Report by Class Name (No Detail)

When the Summary Report dialog is displayed on your screen you have the choice to include or exclude detail in the report. The sample below shows the report when Show Detail is NOT selected.

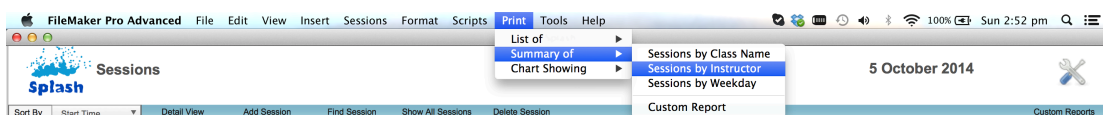
Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Class Name									
Dolphins				22	27	0	64	1.1	27%
Friday				3	2	0	10	0.7	17%
Saturday				5	2	0	18	0.4	10%
Sunday				7	10	0	20	1.1	29%
Thursday				1			4	0.0	0%
Tuesday				3	2	0	10	0.7	17%
Wednesday				3	11	0	2	3.3	83%

Printing a Summary of Sessions by Instructor

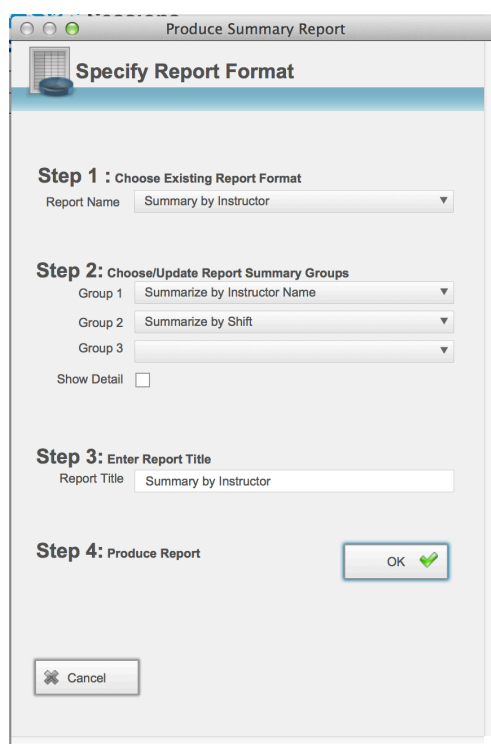
This report displays the average class size, total number of bookings, and spaces remaining for each class on a selected day.

The information in this report is grouped by Instructor and Shift.

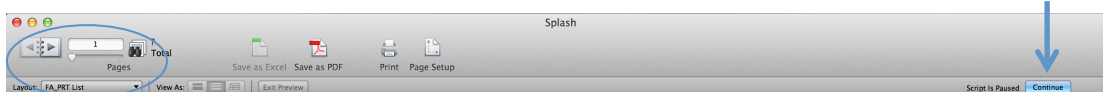
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Sessions by Instructor** from the pop-out menu displayed.



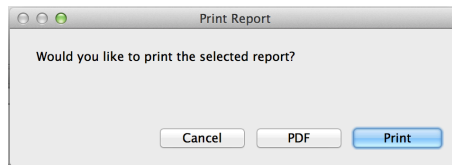
4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary by Instructor
Step 2 = Group 1 set to Summarize by Instructor Name,
Group 2 set to Summarize by Shift
Step 3 = Report Name set to Summary by Instructor
6. Amend any of the above steps or include additional grouping options at Step 2 and click the **OK** button.



7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



8. The **Print Report** dialog will be displayed on your screen.



10. Click **OK** to print the report or Cancel to return to your original screen without printing.

Print Report by Instructor (Show Detail)

When the Summary Report dialog is displayed on your screen you have the choice to include or exclude detail in the report. The sample below shows the report when Show Detail is selected.

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Instructor									
Barbara Smith				35	33	0	168	0.7	16%
Afternoon				2	6	0	2	3.0	75%
2:00 PM	Tue	Dolphins	BS	2			2		
2:30 PM	Wed	Dolphins	BS	4			0		
Early				1			6	0.0	0%
6:30 AM	Fri	Sharks	BS	0			6		
Morning				32	27	0	160	0.6	13%
9:30 AM	Sun	Dolphins	BS	1			3		
9:00 AM	Sun	Dolphins	BS	2			2		

Print Report by Instructor (No Detail)

When the Summary Report dialog is displayed on your screen you have the choice to include or exclude detail in the report. The sample below shows the report when Show Detail is NOT selected.

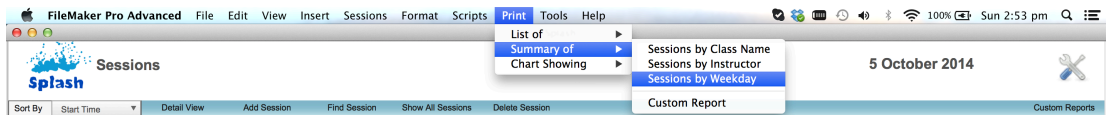
Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Instructor									
Barbara Smith				458	319	0	2140	0.7	16%
Afternoon				7	20	0	8	2.9	71%
Early				15			90	0.0	0%
Morning				436	299	0	2042	0.7	16%
Brian Thomson				356	259	0	1340	0.7	16%
Afternoon				73	61	0	231	0.8	21%
Morning				283	198	0	1109	0.7	15%
Dave Smith				28	51	0	95	1.7	42%
Afternoon				5	18	0	2	3.6	90%
Morning				23	33	0	93	1.3	31%

Printing a Summary of Sessions by Weekday

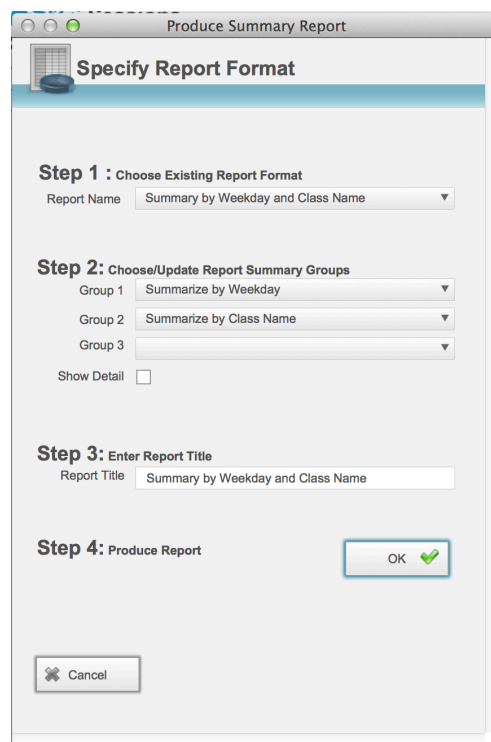
This report displays the average class size, total number of bookings, and spaces remaining for each class on a selected day.

The information in this report is grouped by Weekday and Class Name.

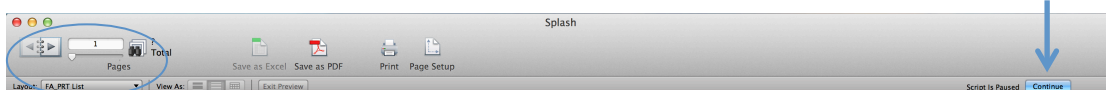
9. Use the **Finding a Session** function to locate the required sessions.
10. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
11. Select **Summary of ...** from the Print menu and select **Sessions by Weekday** from the pop-out menu displayed.



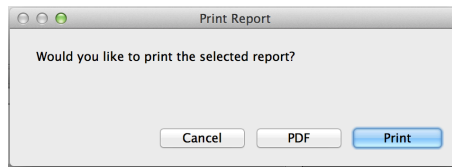
12. The Produce Summary Report dialog will be displayed on your screen.
13. Default data will be set at each of the three steps.
 - Step 1 = Summary by Instructor and Weekday
 - Step 2 = Group 1 set to Summarize by Weekday, Group 2 set to Summarize by Class Name
 - Step 3 = Report Name set to Summary by Weekday and Class Name
14. Amend any of the above steps or include additional grouping options at Step 2 and click the **OK** button.



15. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



16. The **Print Report** dialog will be displayed on your screen.



11. Click **OK** to print the report or Cancel to return to your original screen without printing.

Print Report by Weekday (Show Detail)

When the Summary Report dialog is displayed on your screen you have the choice to include or exclude detail in the report. The sample below shows the report when Show Detail is selected.

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Weekday									
Friday				93	32	0	505	0.3	8%
	1:00 PM	Fri	Sharks	BT	0		6		
	1:30 PM	Fri	Whales	BS	0		10		
	1:30 PM	Fri	Dolphins	BT	0		4		
	9:30 AM	Fri	Turtles	LW	0		8		
	10:00 AM	Fri	Turtles	LW	0		8		
	10:30 AM	Fri	Turtles	LW	0		8		
	9:30 AM	Fri	Seals	ds	0		4		
	10:30 AM	Fri	Seals	BS	0		4		
	11:00 AM	Fri	Seals	BS	0		4		
	6:30 AM	Fri	Sharks	BS	0		6		
	9:00 AM	Fri	Penguins	bs	0		4		

Print Report by Weekday (No Detail)

When the Summary Report dialog is displayed on your screen you have the choice to include or exclude detail in the report. The sample below shows the report when Show Detail is NOT selected.

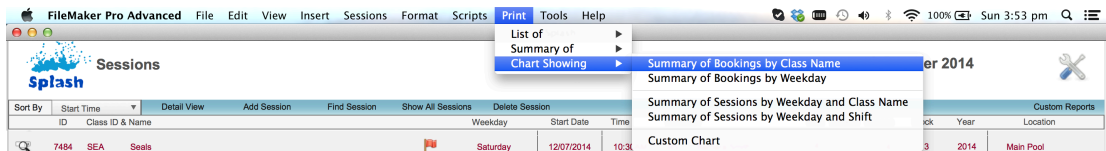
Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Weekday									
Friday				93	32	0	505	0.3	8%
Monday				148	274	0	624	1.8	38%
Saturday				218	66	0	1260	0.3	6%
Sunday				242	164	0	1258	0.6	13%
Thursday				134	4	0	838	0.0	1%
Tuesday				86	63	0	442	0.6	14%
Wednesday				206	244	2	1021	1.1	23%

Print Chart Showing Summary of Bookings by Class Name

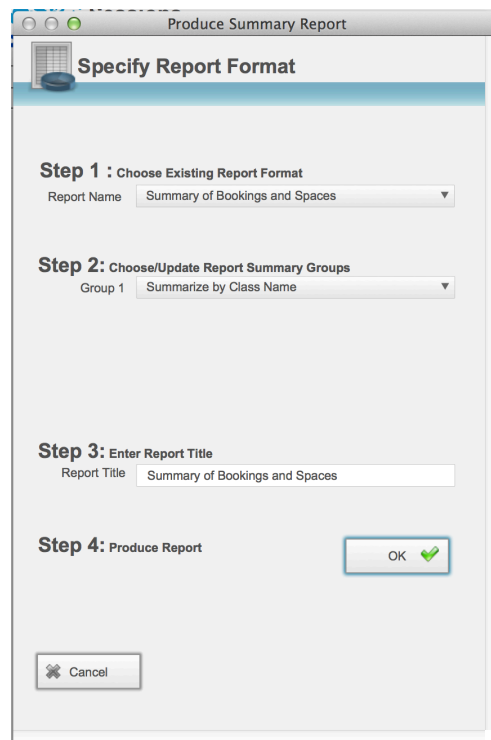
This report displays as a graph; it shows the number of bookings and the number of spaces remaining across each class type for the found set of records. The report can be customised to include exits.

The information in this report is grouped by Class Name.

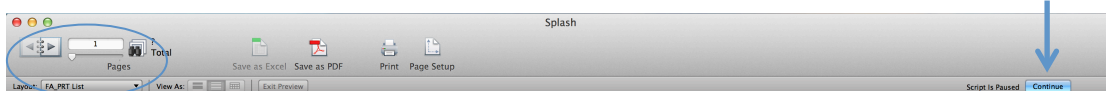
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Sessions by Class Name** from the pop-out menu displayed.

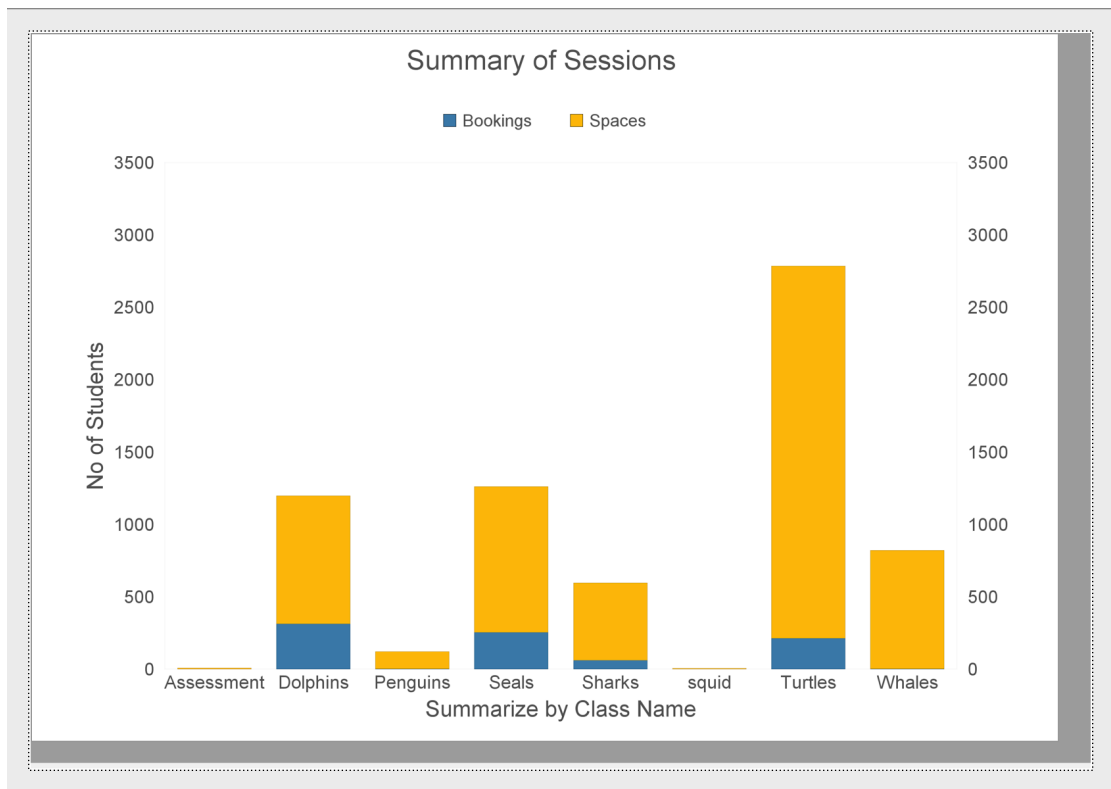


4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary of Bookings and Spaces
Step 2 = Group 1 set to Summarize by Class Name
Step 3 = Report Name set to Summary of Bookings and Spaces
6. Amend the grouping options at Step 2 if required and click the **OK** button.

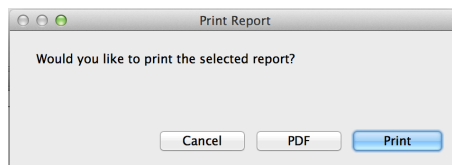


7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).





8. The **Print Report** dialog will be displayed on your screen.



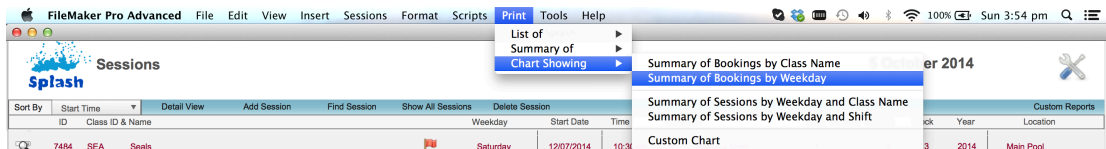
9. Click **OK** to print the report or Cancel to return to your original screen without printing.

Print Chart Showing Summary of Bookings by Weekday

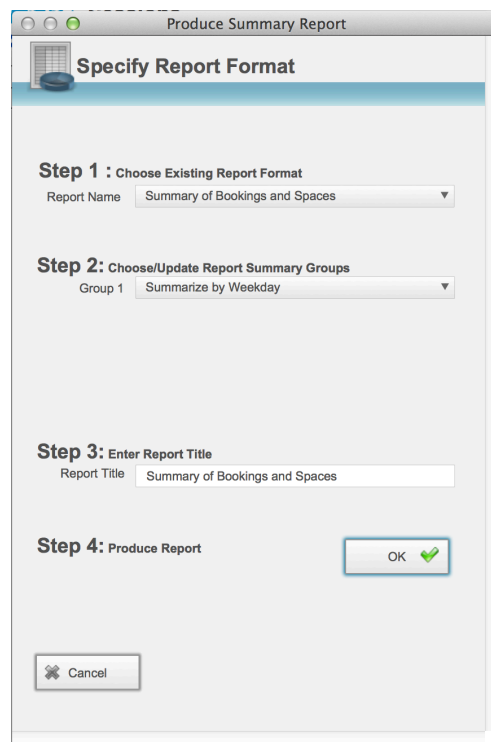
This report displays as a graph; it shows the number of bookings and the number of spaces remaining across each weekday for the found set of records. The report can be customised to include exits.

The information in this report is grouped by Weekday.

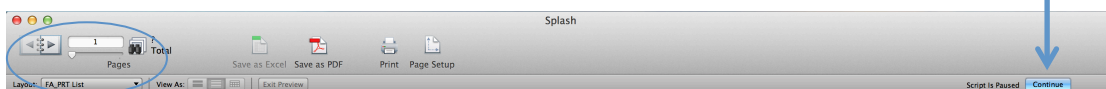
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Sessions by Weekday** from the pop-out menu displayed.

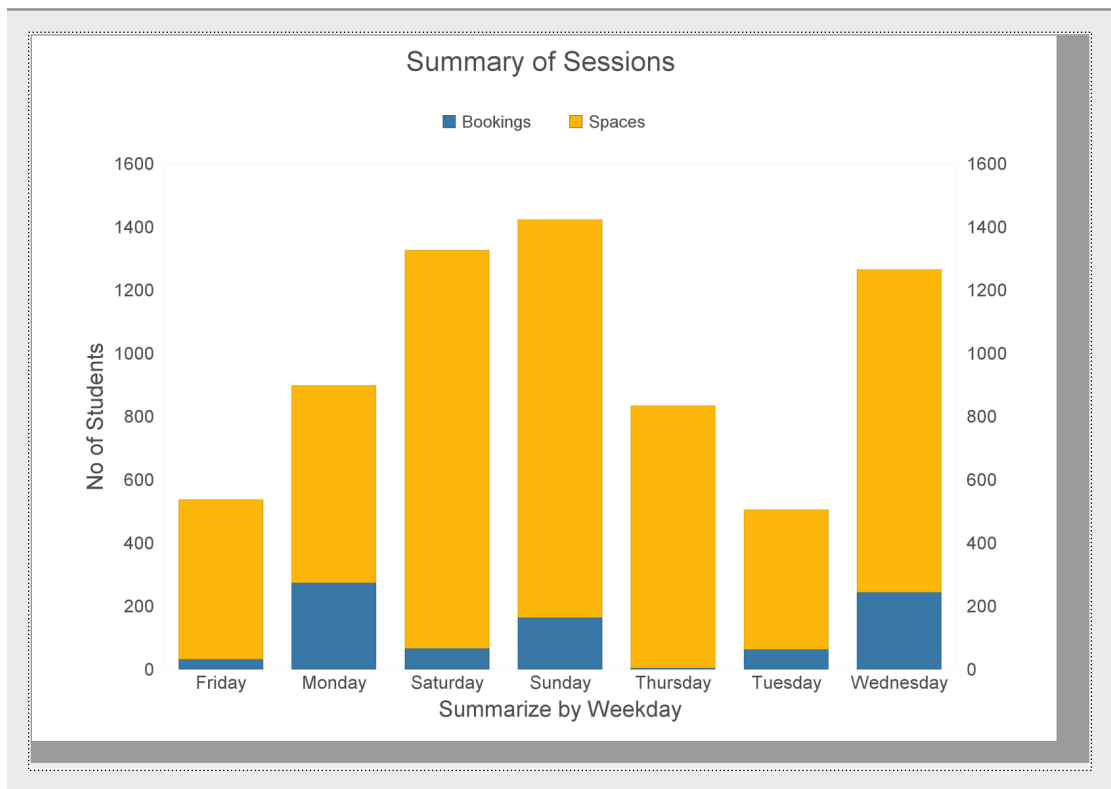


4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary of Bookings and Spaces
Step 2 = Group 1 set to Summarize by Weekday
Step 3 = Report Name set to Summary of Bookings and Spaces
6. Amend the grouping options at Step 2 if required and click the **OK** button.

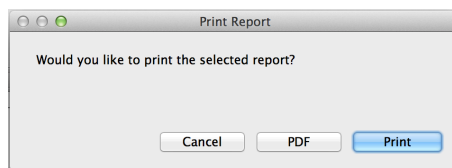


7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the Continue button on the status panel (or press ENTER).





8. The **Print Report** dialog will be displayed on your screen.



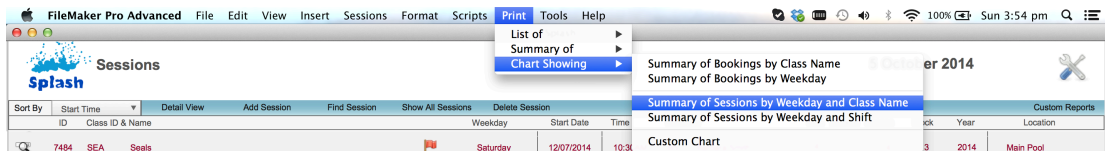
9. Click **OK** to print the report or **Cancel** to return to your original screen without printing.

Print Chart Showing Summary of Bookings by Weekday and Class Name

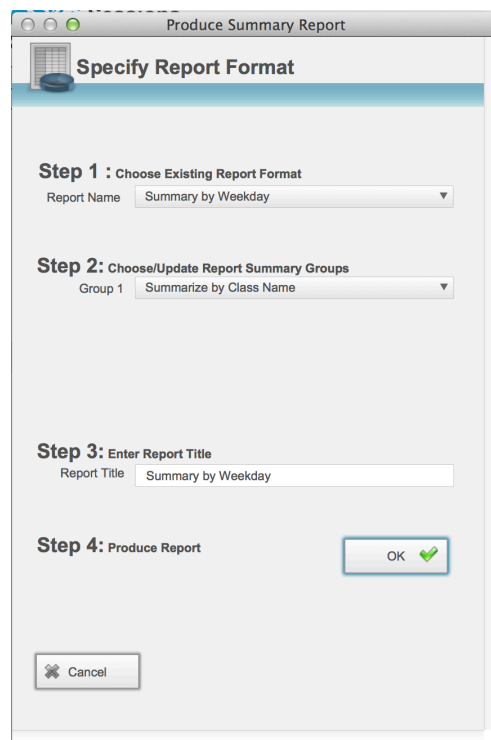
This report displays as a graph; it shows the number of bookings for each weekday within each class for the found set of records.

The information in this report is grouped by Weekday and Class Name.

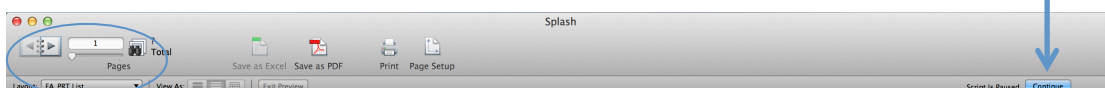
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Sessions by Weekday and Class Name** from the pop-out menu displayed.

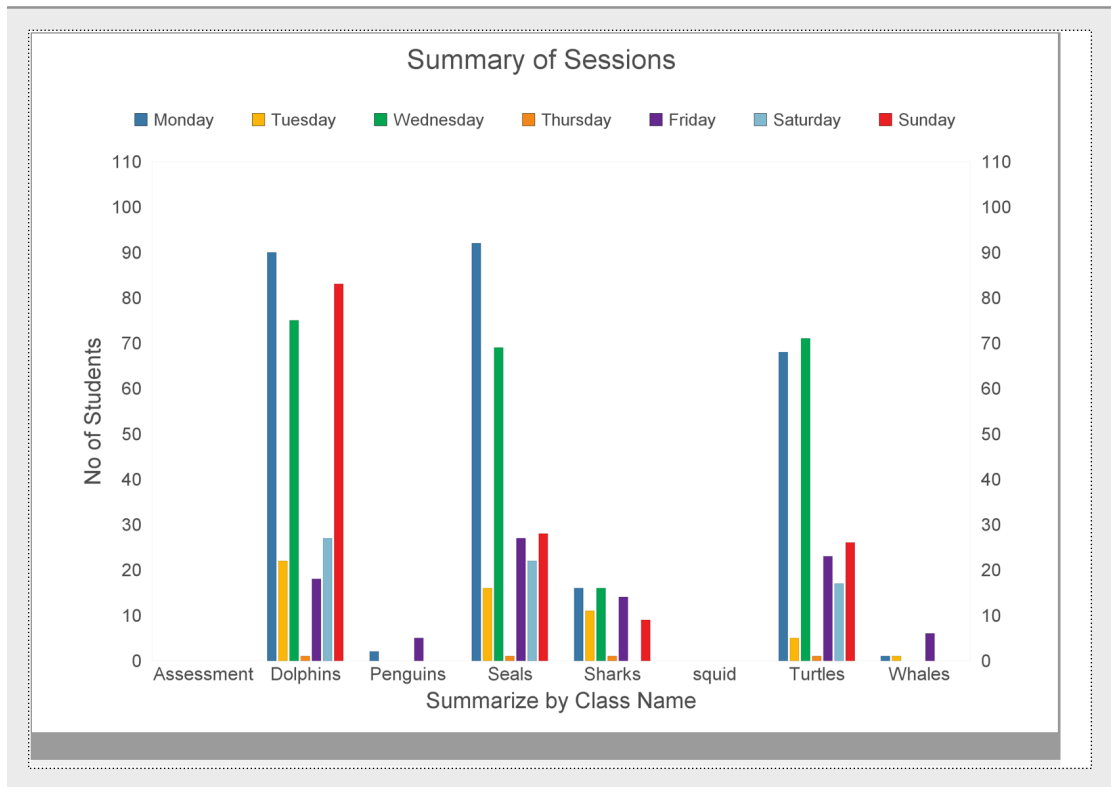


4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary by Weekday
Step 2 = Group 1 set to Summarize by Class Name
Step 3 = Report Name set to Summary by Weekday
6. Amend the grouping options at Step 2 if required and click the **OK** button.

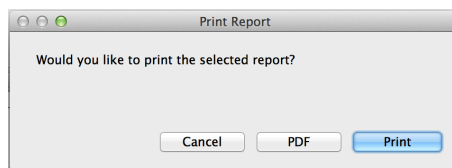


7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the Continue button on the status panel (or press ENTER).





8. The **Print Report** dialog will be displayed on your screen.



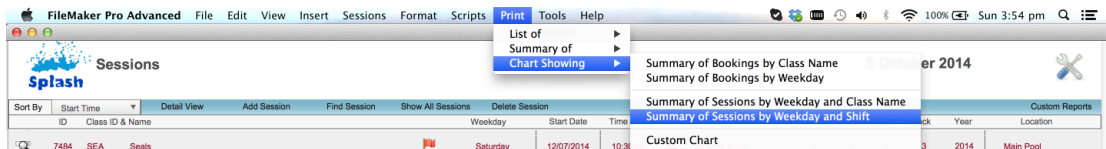
9. Click **OK** to print the report or **Cancel** to return to your original screen without printing.

Print Chart Showing Summary of Bookings by Weekday and Shift

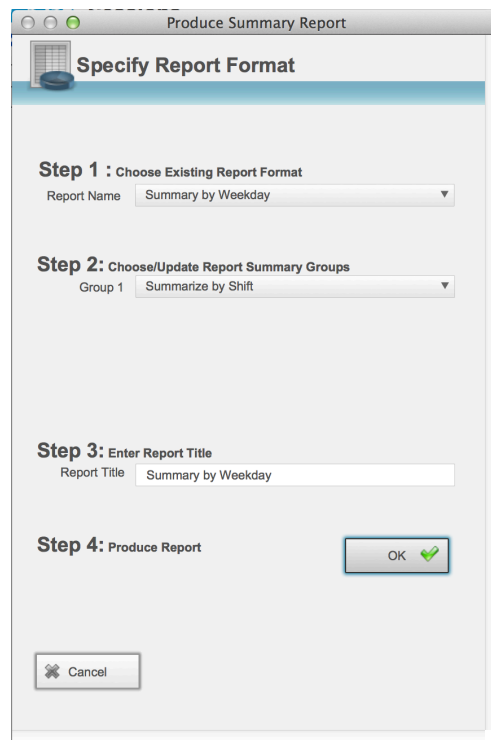
This report displays as a graph; it shows the number of bookings within each shift for each weekday for the found set of records.

The information in this report is grouped by Weekday.

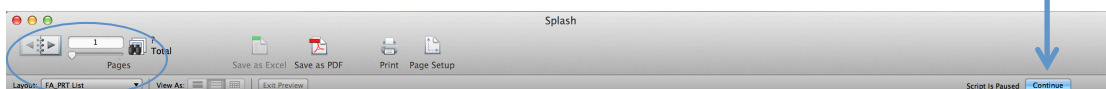
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Sessions by Weekday and Shift** from the pop-out menu displayed.

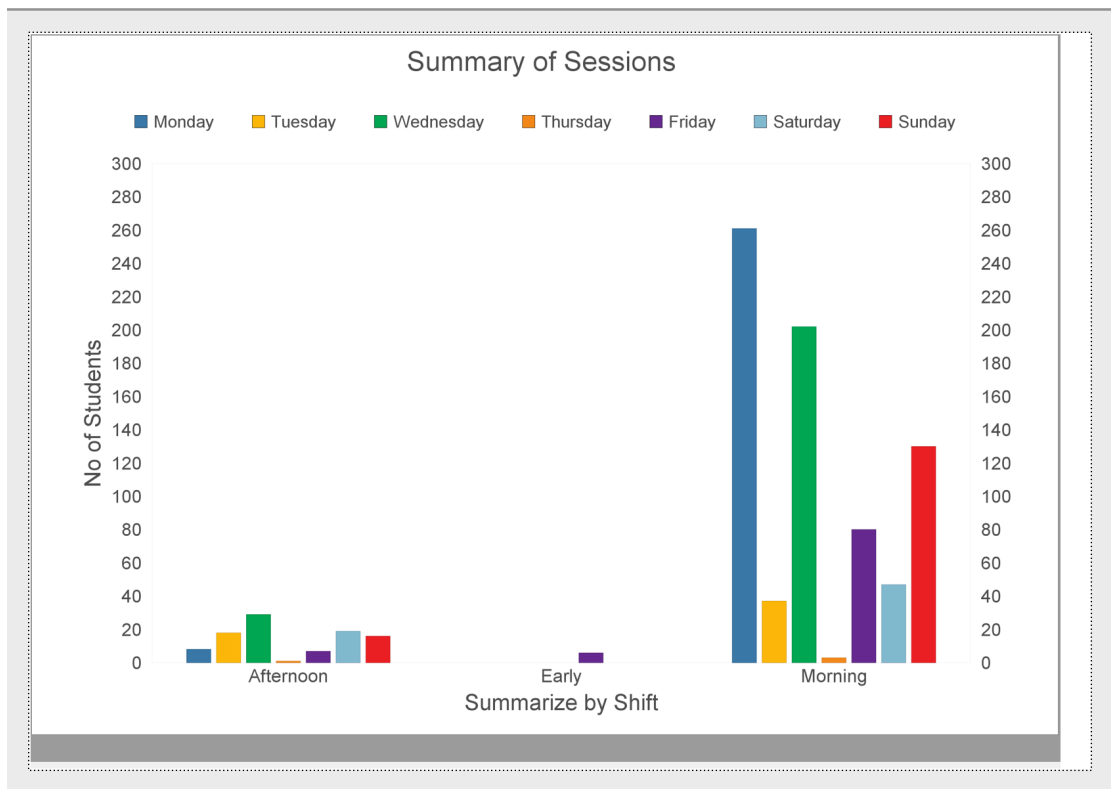


4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary by Weekday
Step 2 = Group 1 set to Summarize by Shift
Step 3 = Report Name set to Summary by Weekday.
6. Amend the grouping options at Step 2 if required and click the **OK** button.

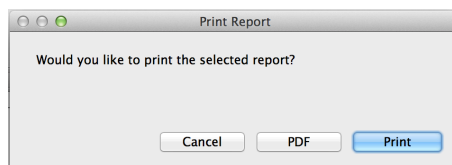


7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the Continue button on the status panel (or press ENTER).





8. The **Print Report** dialog will be displayed on your screen.



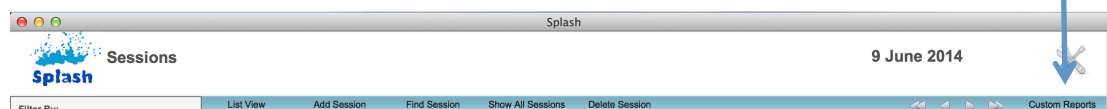
9. Click **OK** to print the report or Cancel to return to your original screen without printing.

Printing a Custom Report

In addition to the generic student reports, Splash provides custom report writing. Custom reports are specific reports layouts where you can change the grouping for summary totals.

Displaying the Custom Report Dialog

1. Use the **Finding a Session** function to locate the group of students you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Click once on the Custom Report button displayed in the blue stripe at the top of your screen.



4. The report writer will be displayed on your screen.

A screenshot of the 'Produce Summary Report' dialog box. The dialog has a title bar with 'Produce Summary Report'. Inside, there's a section titled 'Specify Report Format' with four steps:

- Step 1: Choose Existing Report Format** - A dropdown menu for 'Report Name' is set to 'Summary by Instructor and Class Name'.
- Step 2: Choose/Update Report Summary Groups** - Three dropdown menus for 'Group 1', 'Group 2', and 'Group 3' are set to 'Summarize by Instructor Name', 'Summarize by Class Name', and an empty dropdown respectively. There is a 'Show Detail' checkbox which is unchecked.
- Step 3: Enter Report Title** - A text field for 'Report Title' contains 'Summary by Instructor and Class Name'.
- Step 4: Produce Report** - An 'OK' button with a green checkmark icon.

At the bottom left is a 'Cancel' button with a red X icon.

Defining a Custom Report

The custom report dialog is divided into three steps. When you have completed each of the three sections you are ready to generate your report. Create your custom report by completing the steps outlined below:

1. Choose the Report Type
2. Choose the Reporting Groups.
3. Give your report a title.

The three fields displayed at **Step 2** are used to define how the information in your report will be structured. Summary totals will be displayed for each group you have defined at levels one, two and three.

If you wish to include detailed information about each family in your report, click the **Show Detail** button.

Step 2: Choose/Update Report Summary Groups

Group 1 Summarize by Instructor Name

Group 2 Summarize by Class Name

Group 3

Show Detail ☐

Defining a Summary Report (Show Detail)

Information in the report below has been grouped by the categories defined above, however this time **Show Detail in Report** has been selected.

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Instructor and Class Name									
Barbara Smith				35	32	0	162	0.7	15%
Dolphins				9	13	0	24	1.2	31%
9:30 AM	Sun	Dolphins	BS	1			3		
9:00 AM	Sun	Dolphins	BS	2			2		
9:30 AM	Sat	Dolphins	BS	0			4		
9:30 AM	Fri	Dolphins	BS	0			4		
2:00 PM	Tue	Dolphins	BS	2			2		
9:30 AM	Tue	Dolphins	BS	0			4		
2:30 PM	Wed	Dolphins	BS	4			0		
9:00 AM	Sun	Dolphins	BS	1			3		
9:30 AM	Sun	Dolphins	BS	1			2		

If you wish to include detailed information about each session in your report, click the **Show Detail in Report** button.

Defining a Summary Report (No Detail)

The sample report below demonstrates the use of the summary levels. Drop-down menus have been provided to assist you in structuring your report.

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Instructor and Class Name									
Barbara Smith				35	32	0	162	0.7	15%
Dolphins				9	13	0	24	1.2	31%
Penguins				2			8	0.0	0%
Seals				13	8	0	44	0.5	13%
Sharks				1			6	0.0	0%
Turtles				4	11	0	20	1.8	23%
Whales				6			60	0.0	0%

Defining Student Details

Personal information about each student is maintained in this module. It includes a history of all bookings and details the student progress towards class goals. This module can be used to generate birthday lists and correspondence. Custom fields in this module enable you to store additional information outside the system defaults.

The Student Record

Each student record contains generic information about the student and their family. On the right of the screen you will see five tab cards; Bookings, Achievements, Waiting List, Correspondence, and Custom Fields.

The screenshot shows the 'Students' module in the Splash application. The interface includes a sidebar with a list of students, a main form for student details, and a right-hand panel with tabs for Bookings, Achievements, Waiting List, Correspondence, and Custom Fields. The student record for Nicholas Smith is displayed, showing fields for Name, Date of Birth, Age, Gender, Medical, and Comments. The Primary Contact tab is selected, showing details for Barbara Smith, including her relationship (Mother), address, email, and telephone numbers. The Bookings tab shows a list of bookings for Nicholas Smith, including dates, times, and locations.

Bookings	Achievements	Waiting List	Correspondence	Custom Fields		
1:00 PM	7/01/15	Wed	Seals	BS	1	2015
1:00 PM	7/01/15	Wed	Seals	BS	1	2015
1:00 PM	15/10/14	Wed	Seals	BS	4	2014
9:30 AM	13/07/14	Sun	Dolphins	BS	3	2014
1:00 PM	9/07/14	Wed	Seals	BT	3	2014
9:30 AM	10/02/14	Mon	Turtles	BS	1	2014

NB: Display family information or access the family file by clicking the Primary Contact tab card.

The screenshot shows the 'Primary Contact' tab for the student record. It displays the following information:

- Name: Barbara / Smith (First Name / Last Name)
- Relationship: Mother
- Address: 6A Erlestoke Crescent, Churton Park, Wellington 4001
- Email: barbaras@xtra.co.nz
- Telephone: Home 04 478 4616, Work, Mobile 0272222082

An SMS icon is located to the left of the Mobile telephone number.

NB: Send a SMS directly to the selected family by clicking the SMS icon to the left of the Mobile telephone number.

Student Bookings – The Bookings tab card within the student file displays a list of all bookings made for the selected student. Each booking line displays the payment status, day, time, class name, and block. Catchups and exits are also displayed in the list, however they are colour coded to represent future catchups, current catchups, past catchups or exited bookings.

Navigate quickly to a selected booking by clicking the magnifier to the left of the required booking.

The screenshot shows the 'Students' interface with the 'Bookings' tab selected. The student profile for Nicholas Smith (ID 17) is visible on the left. The bookings table on the right lists several entries. A magnifying glass icon is highlighted next to the booking on 13/07/14 at 9:30 AM for the 'Dolphins' class.

Time	Date	Day	Class	Block	Total Enrolments (5)
1:00 PM	7/01/15	Wed	Seals	BS	1 2015
1:00 PM	7/01/15	Wed	Seals	BS	1 2015
1:00 PM	15/10/14	Wed	Seals	BS	4 2014
9:30 AM	13/07/14	Sun	Dolphins	BS	3 2014
1:00 PM	9/07/14	Wed	Seals	RT	3 2014
9:30 AM	10/02/14	Mon	Turtles	BS	1 2014

Student Achievements – Displayed in the second tab card, Achievements displays a history of the goals associated with all classes the student has been scheduled to attend. Within the achievements list you can monitor the students' progress towards each of the assigned goals.

The screenshot shows the 'Students' interface with the 'Achievements' tab selected. The student profile for Nicholas Smith (ID 17) is visible on the left. The achievements list on the right shows several goals.

Goal
Bubble and breathe 10 metres
Kick on Back 10 metres
Breaststroke Kick 5 metres
Butterfly Arms 5 metres

Student Waiting List – Displayed in the third tab card, the Waiting List displays a record of any waitlisted session the student has been placed on. Remove the student from a waiting list by clicking the red cross on the right of the row you wish to remove.

The screenshot shows the 'Students' interface with the 'Waiting List' tab selected. The interface includes a sidebar with a student list, a central student profile form, and a main area displaying the waiting list.

Student Profile:

- Student ID: 17
- Name: Nicholas Smith
- Date of Birth: 6/11/2006
- Age: 7
- Gender: Male
- Medical: Glasses
- Comments:

Waiting List:

Session	Block	Year	Action
10:30 AM Sat Seals	BS 3	2014	[X]
9:30 AM Sun Dolphins	BS 3	2014	[X]

Student Correspondence – The fourth tab card on the student file; Correspondence displays a list of all communication with the student or the student's family in direct relation to the selected student. Correspondence may be email, SMS, letter or a file note. Click the Create Correspondence button to create a new correspondence item.

The screenshot shows the 'Students' interface with the 'Correspondence' tab selected. The interface includes a sidebar with a student list, a central student profile form, and a main area displaying the correspondence list.

Student Profile:

- Student ID: 17
- Name: Nicholas Smith
- Date of Birth: 6/11/2006
- Age: 7
- Gender: M
- Medical: Glasses
- Comments:

Correspondence:

Type	Recipient	Action
27/04/14 Reminder	Barbara Smith	[Create]
9/03/14 Booking	Barbara Smith	[Create]
9/03/14 Booking	Barbara Smith	[Create]
20/05/11 Reminder	Barbara Smith	[Create]
20/05/11 Reminder	Barbara Smith	[Create]
28/06/07 Email	Nicholas Smith	[Create]

Student Custom Fields – The Custom Fields tab card within the student file displays seven additional fields for storing information about the student. Five text fields and two date fields have been created for custom use. Define the labels for your custom fields in the Preferences area of Splash.

The screenshot shows the 'Students' window in the 'Splash' application. The interface includes a sidebar with a search filter and a list of students. The main area displays the details for 'Nicholas Smith', including his ID, name, date of birth, gender, and medical information. The 'Custom Fields' tab is active, showing five text fields and two date fields for custom data entry. The status is set to 'Active'.

Students 10 June 2014

Filter By Student Name: [Show All](#)

Sort By: First Name

Student List:

Student Name	Age
Benjamin Nightingale	8_1m
Brendon Nightingale	12_3m
Nicholas Larsen	2_11m
Nicholas Smith	7_7m
Sarah Nightingale	11_9m

Student Details:

Student ID: 17 Allow Photo ☐

Name: Nicholas Smith

Date of Birth: 6/11/2006 Age: 7

Gender: M

Medical: Glasses

Comments:

Primary Contact:

Primary Contact	Other Contact	Emergency Contact	Siblings
Lucas Smith 2_0m			
Sam Smith 7_7m			
Jacob Smith 8_7m			

Address Correspondence To: Guardian

Automatically Rollover Bookings: Yes

Preferred Client: Yes

Credits Owed:

Discount Rate: \$1 Type: Amount

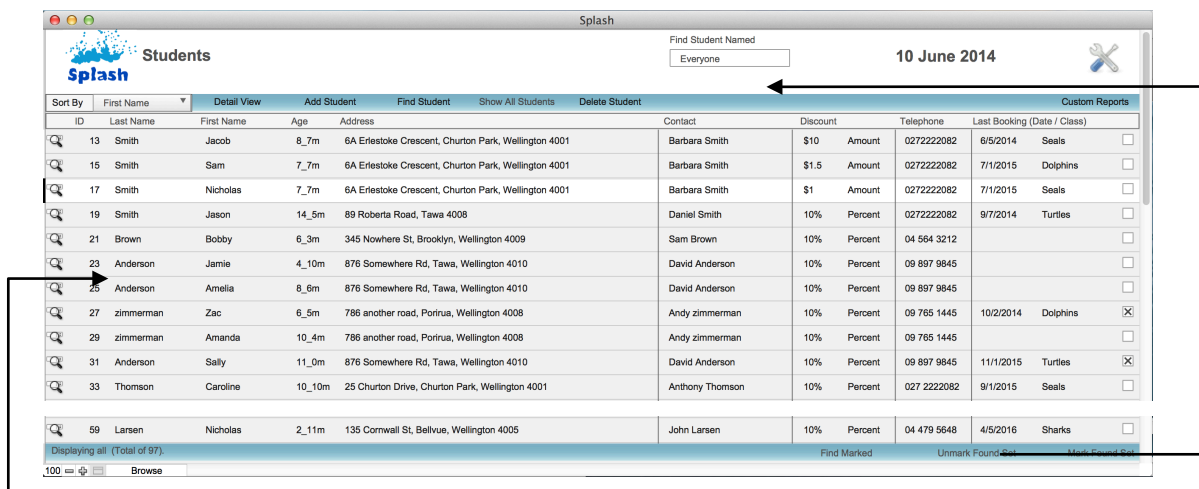
Payment by Direct Debit:

Custom Fields:

Custom Field 1	Custom Field 2	Custom Field 3	Custom Field 4	Custom Field 5	Custom Date 1	Custom Date 2
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Listing Student Records

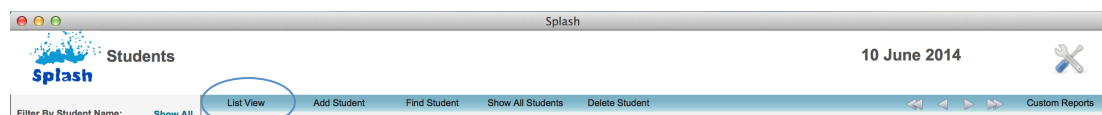
Each record in your database can be displayed in either the entry screen or list view. List view will display all records in the found set – see the bottom left corner of the screen for the size of the current found set.



NB: Click magnifier to the left of the Student ID to display the data entry screen.

Displaying a List of Students (from Student Details)

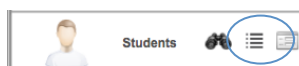
- Click once on the **List View** button displayed in the blue stripe at the top of your screen.



- The Student List View screen will be displayed.

Displaying a List of Student (from outside Student screen)

- Click once on the **Splash** icon on the top left corner of your screen.
- Select the **Student List** icon



- The Student List View screen will be displayed

Adding a New Student to an Existing Family

A new student record must be created whenever a new student joins the swim school. A student cannot be booked in to a session unless they have been registered in Splash. New students may be added through the Students module or via the Family file.

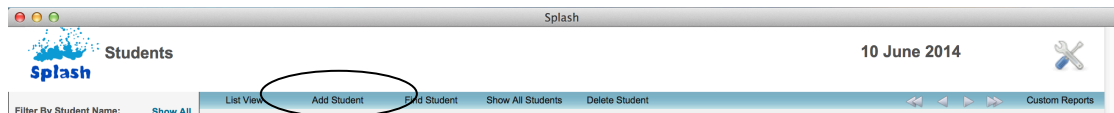
9. Click once on the **Splash** icon on the top left corner of your screen.

10. Select the **Student** icon

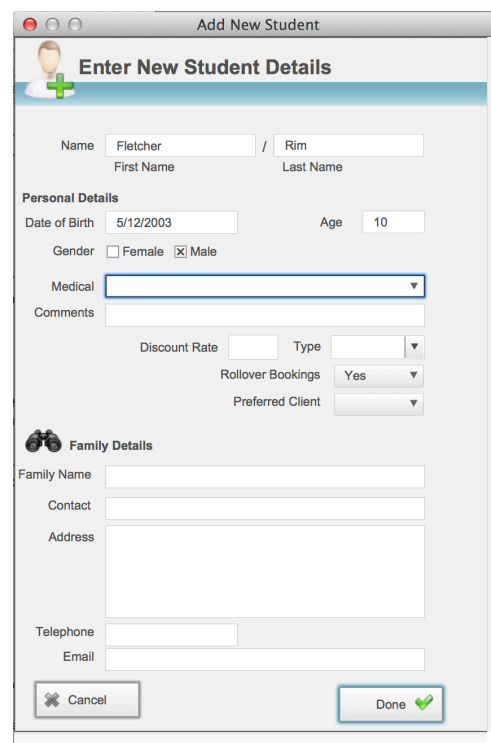


11. The Student data entry screen will be displayed

12. Click once on the **Add Student** button displayed in the blue stripe at the top of your screen.



13. The **Add New Student** dialog will be displayed.

A screenshot of the 'Add New Student' dialog box. The title bar says 'Add New Student'. The main heading is 'Enter New Student Details'. The form is divided into two sections: 'Personal Details' and 'Family Details'. In the 'Personal Details' section, there are fields for 'Name' (split into 'First Name' and 'Last Name'), 'Date of Birth', 'Age', 'Gender' (with radio buttons for Female and Male), 'Medical' (a dropdown menu), 'Comments', 'Discount Rate', 'Type' (a dropdown menu), 'Rollover Bookings' (a dropdown menu), and 'Preferred Client' (a dropdown menu). In the 'Family Details' section, there are fields for 'Family Name', 'Contact', 'Address', 'Telephone', and 'Email'. At the bottom of the dialog are 'Cancel' and 'Done' buttons.

14. Enter the Students' First Name and Surname along with any other personal details you may have.

15. Click the Family icon to select the family the student should be linked to.

16. The **Select a Family** dialog will be displayed on your screen. The student surname will automatically be copied to the filter field and all existing families with a matching surname will be displayed.

Finding a Student

- Click once on the **Splash** icon on the top left corner of your screen.
- Select the **Student Find** icon



- The **Search for a Student** dialog box will be displayed on your screen.

A screenshot of the 'Search for a Student' dialog box. The dialog has a title bar with a 'Splash' icon and the text 'Search for a Student'. It contains several input fields for search criteria: Student ID, Name, Address, Email, Guardian Name, Telephone, Family Alert, Medical, Status, Gender, Allow Photo, Student Birthday (Month, Day of Month, Date of Birth, Age), Automatically Rollover Booking, Discount Rate, Discount Type, Credits Owing, Payment by Direct Debit, and Comments. There are also buttons for 'Cancel', 'New Request', 'Omit Records', 'Constrain Set', 'Extend Set', and 'Find Now'. The 'Find Now' button is highlighted in blue.

- Enter the criteria for your find by typing your request in the corresponding field/s.
- Click the **Find Now** button.
- If one record is located the record will be displayed on the Student entry screen. If multiple records are located the found set will be displayed in the list view.

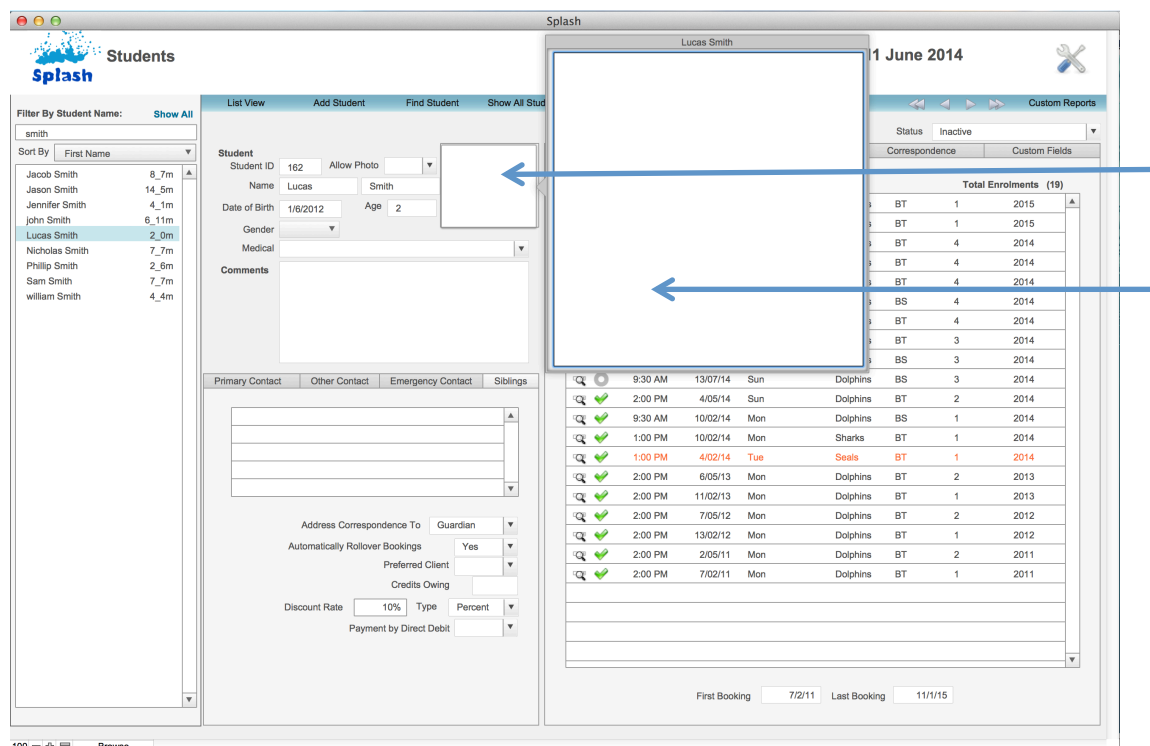
NB: See *Advanced Find Techniques* within this guide for assistance with Constraining or Extending the found set.

Updating Student Details

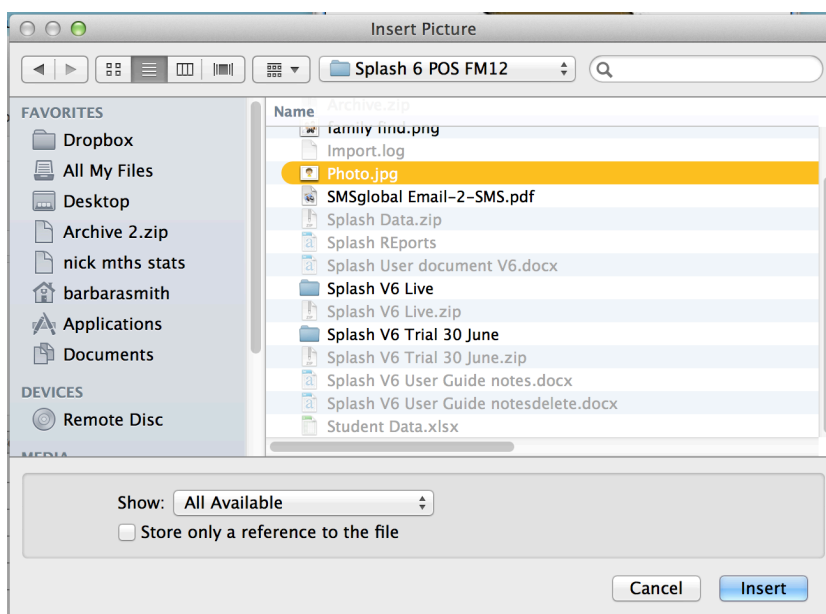
- Use the **Finding a Student** function to locate the student record you wish to update.
- When the correct student screen is displayed simply overtype any of the information to update the information that has been stored.

Inserting a Photograph

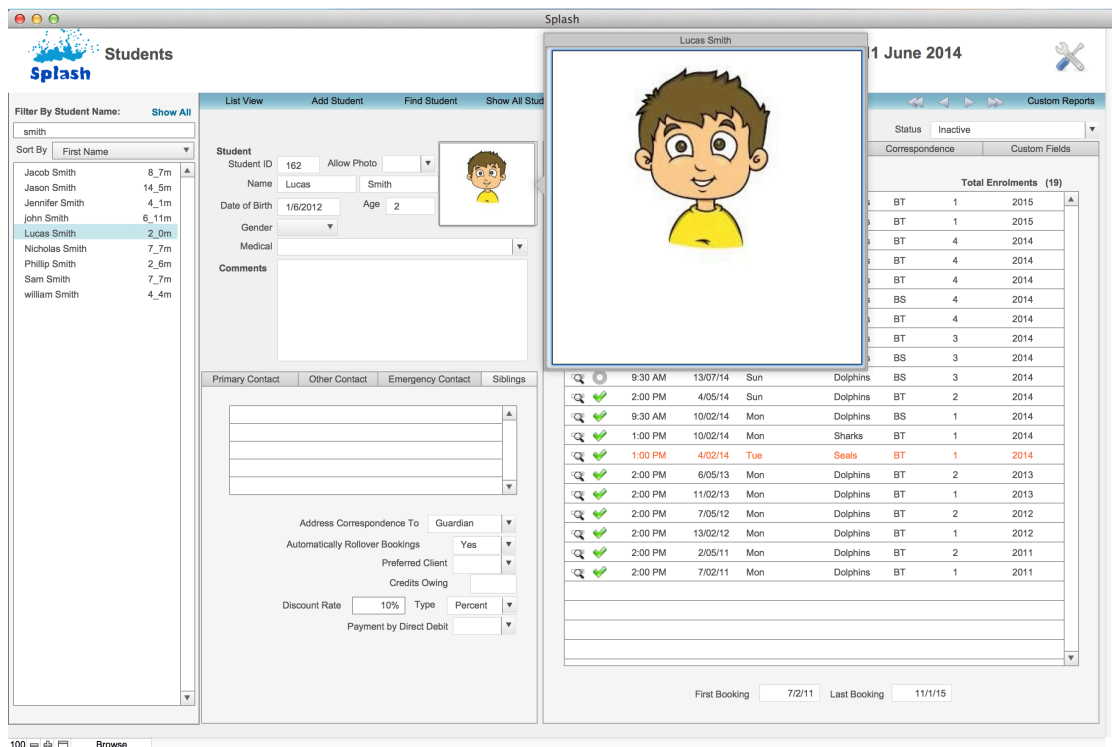
1. Use the **Finding a Student** function to locate the student record you wish to update.
2. When the correct student screen is displayed click once in the Photo field.



3. Click once inside the large photo field.
4. Select **Picture** from the **Insert** menu.



5. Locate and select the student photograph.
6. Click **Insert** to place the photograph on the student file.



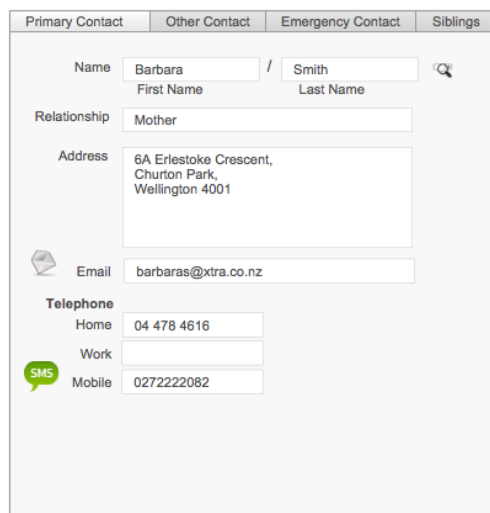
Removing a Student Photograph

1. Use the **Finding a Student** function to locate the student record you wish to update.
2. When the correct student screen is displayed click once in the Photo field.
3. Click once inside the large photo field.
4. Press the **Delete** key on your keyboard.

Sending a SMS Message

SMS messages can be sent to individual recipients or all recipients in the found set. This command outlines the process for sending an SMS message to the current students' family. This command will only be successful if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

1. Use the **Finding a Student** function to locate the student record you wish to update.
2. When the correct family screen is displayed simply click Primary Contact card to display the family contact details.
3. Click once on the SMS button displayed to the left of the Mobile telephone number.

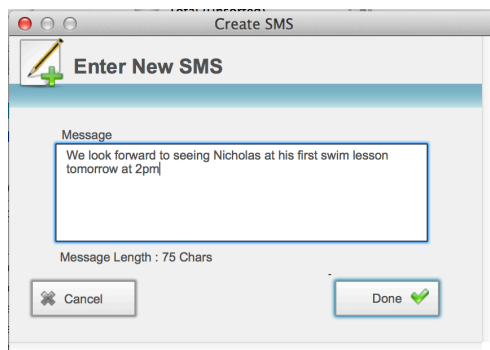


The screenshot shows a 'Primary Contact' form with the following fields:

- Name:** Barbara / Smith (First Name / Last Name)
- Relationship:** Mother
- Address:** 6A Erlestoke Crescent, Churton Park, Wellington 4001
- Email:** barbaras@xtra.co.nz
- Telephone:**
 - Home: 04 478 4616
 - Work: (empty)
 - Mobile: 0272222082

A green 'SMS' button is located to the left of the Mobile telephone number field.

4. The **Enter New SMS** dialog will be displayed on your screen.

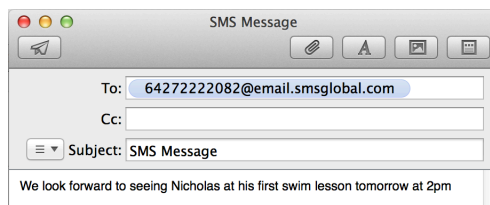


The 'Enter New SMS' dialog box contains:

- Message:** We look forward to seeing Nicholas at his first swim lesson tomorrow at 2pm
- Message Length:** 75 Chars
- Buttons:** Cancel and Done (with a green checkmark icon)

5. Enter the message you wish to send.
6. Click the **Done** button to send your message and return to the family entry screen.

NB: Each SMS message is sent via your email application as per the sample below.



The screenshot shows an email client window titled 'SMS Message' with the following details:

- To:** 6427222082@email.msglobal.com
- Cc:** (empty)
- Subject:** SMS Message
- Body:** We look forward to seeing Nicholas at his first swim lesson tomorrow at 2pm

Creating a Record of Achievement

1. Use the **Finding a Student** function to locate the required student record.
2. When the correct student is displayed on your screen; select the **Scripts** menu... choose **Send Record of Achievement**.

The screenshot shows the 'Students' interface in the Splash software. On the left, there's a 'Filter By Student Name' field with 'Smith' entered. Below it, a list of students is shown, including Jacob Smith, Jason Smith, Jennifer Smith, John Smith, Lucas Smith, Nicholas Smith, Phillip Smith, Sam Smith, and William Smith. The main area displays the student record for Gareth Buchanan, including his ID (103), name, date of birth (22/3/2004), age (10), gender (Male), and medical history. There's also a section for 'Primary Contact' with details for Frederick Buchanan. On the right, a 'Bookings' table lists various activities like Sharks, Dolphins, and Seals with their respective dates and times. The status panel at the top right shows 'Status: Active' and 'Custom Reports'.

3. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).

This screenshot shows the bottom of the Splash interface. The status panel at the bottom right has a 'Continue' button highlighted with a blue arrow. The interface also shows a 'Pages' section with a 'Total' button and a 'Script is Paused' message.

4. The **Print Report** dialog will be displayed on your screen.

The screenshot shows a 'Message' dialog box with the text 'Do you want to PRINT or EMAIL the Record of Achievement?'. There are three buttons: 'Cancel', 'Email', and 'Print'.

5. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

The screenshot shows a 'Record of Achievement for Gareth Buchanan' report. The report is titled 'Level 4 - Dolphins' and lists four activities with their status and dates:

Activity	Status	Date
1 Bubble and breathe 10 metres	Mastered	4/4/2014
2 Kick on Back 10 metres	Mastered	4/4/2014
3 Breaststroke Kick 5 metres	Learning	28/4/2014
4 Butterfly Arms 5 metres	Learning	28/4/2014

Below the activities, there is a note: 'Needs to work on xxxxx'.

Moving a Student from One Family to Another

Use these instructions when you have created a student record, however the student has accidentally been linked to an incorrect family module. Alternatively you may need to consolidate two family records where multiple children from the same family have been created under different family records.

6. Use the **Finding a Student** function to locate the student record you wish to update.
7. When the correct student screen click once on the **Primary Contact** tab card.
8. Hold down the **Shift** key while you click the **magnifier** to the right of the primary contact name.

The screenshot shows the 'Students' interface in the 'Splash' application. The date is 10 June 2014. The 'Find Student' tab is active. A student record for Lucas Smith (Student ID 162) is displayed. The 'Primary Contact' tab is selected, showing contact details for Barbara Smith. A magnifying glass icon is visible next to the Primary Contact name field. The 'Bookings' tab is also visible, showing a list of bookings for the student.

9. The **Select a Family** dialog box will be displayed on your screen

The 'Select a Family' dialog box is displayed. It contains a search filter set to 'Smith'. Below the filter, there is a table listing families:

Name	Surname	Phone	Address	Children
Smith	Unknown	999. 999		
Smith	Barbara	0272222082	6A Erlestoke Crescent, Churton Park, Wellington	Jacob, Sam, Nicholas, Lucas
Smith	Daniel	0272222082	89 Roberta Road, Tawa 4008	Jason, Phillip, Jennifer, John
Smith	Bridget	478 4616	1243 Any Street, Wellington	

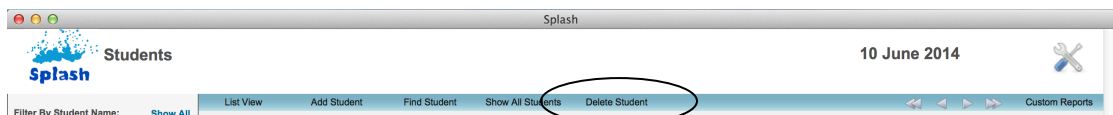
10. The student surname will automatically be copied the filter field and all existing families with a matching surname will be displayed.
11. Simply click the record representing the family you wish to move the child into.

Deleting a Student Record

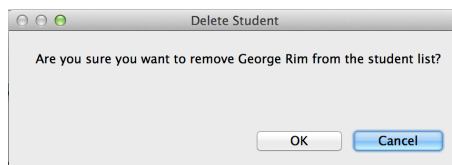
As a rule a record should only be deleted if it was made in error. To ensure data integrity a student record can only be deleted if there are no bookings. Student records can be deleted from either the Student entry screen or the list view.

Deleting a Student from List View

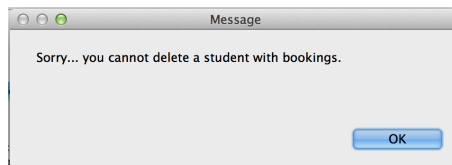
4. Use the **Finding a Student** function to locate the student record you wish to delete.
5. When the correct student entry record is displayed on your screen click once on the row containing the relevant student record.
6. Click once on the **Delete Student** button displayed in the blue tripe at the top of your screen.



7. A dialog will be displayed asking you to confirm the student record should be deleted.



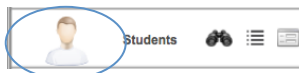
8. Click **OK** to delete the record or **Cancel** to return to the student screen without making a change.



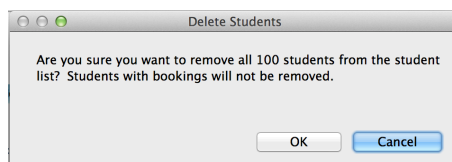
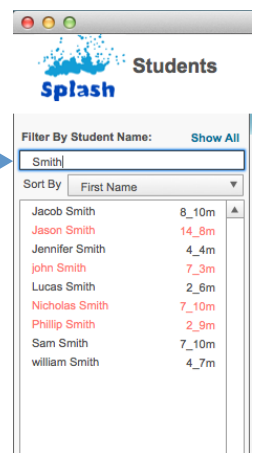
NB: You cannot delete a student with bookings attached.

Deleting a Student from the Student Entry Screen

3. Click once on the **Splash** icon on the top left corner of your screen.
4. Select the **Student** icon



5. The Student data entry screen will be displayed, enter the name of the student you wish to remove in the filter field at the top of the portal list on the left of your screen.
6. Using the portal on the left of the screen, click once on student you wish to delete.
7. The portal row will be highlighted to indicate the active record. The details of the selected student will be displayed on the right of your screen.
8. Click once on the **Delete Student** button.
9. You will be asked to confirm the selected student is to be deleted.



Generating Student Documents

The Correspondence tab card within the student file displays a list of all correspondence created for the selected student (with the exception of broadcast email or SMS messages).

1. Use the **Finding a Student** function to locate the student record you wish to create a document for.
2. Click once on the **Correspondence** tab card displayed on the right of the screen.

The screenshot shows the 'Students' window in the Splash application. The 'Find Student' tab is active, displaying the student record for Nicholas Smith (Student ID 17). The 'Correspondence' tab is selected on the right, showing a list of correspondence items. The list includes reminders, bookings, and account notices, all sent to Barbara Smith or Nicholas Smith. The interface includes a search bar, a list of students on the left, and various tabs for student management at the top.

3. Click once on the **Add Correspondence** button to display the **Create Document** dialog box.

Create Correspondence 

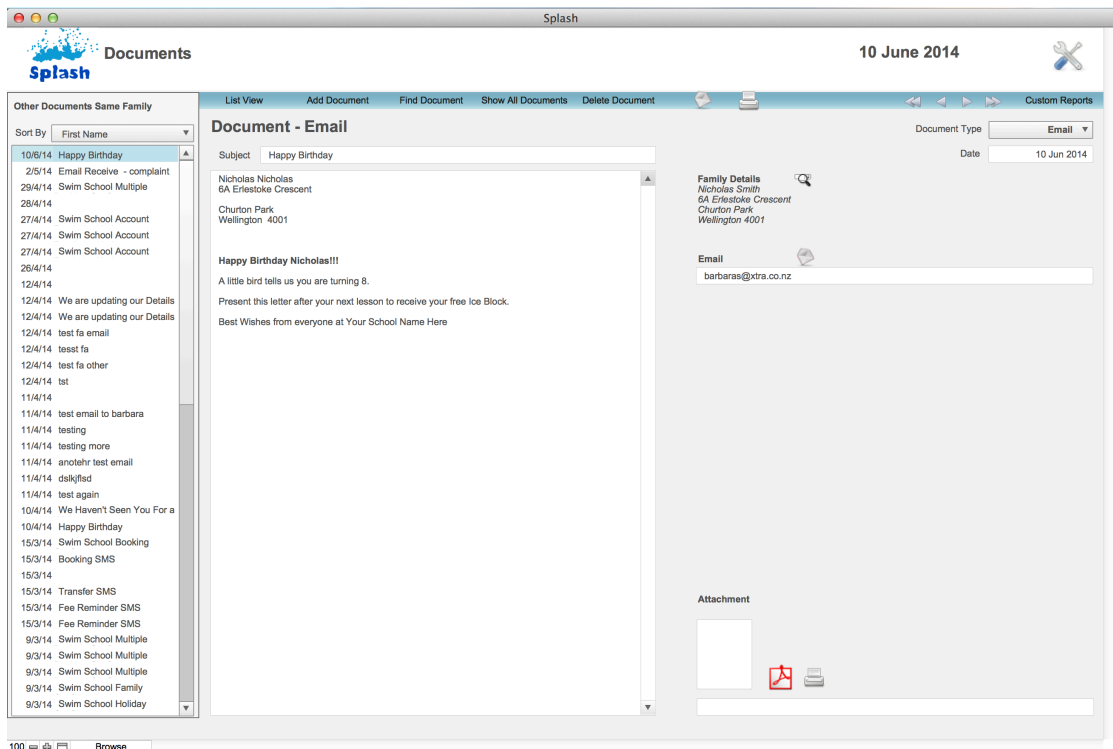
4. Choose the type of document you want to create and click the **Done** button.

The 'Create Document' dialog box is shown. It has a title bar with 'Create Document' and a pencil icon. The main text says 'Create New Document'. Below this, it says 'Please select the type of document you would like to create'. A dropdown menu is open, showing 'Email' selected. At the bottom, there are 'Cancel' and 'Done' buttons. The 'Done' button has a green checkmark.

5. The **Create Document** dialog box will be displayed on your screen. Select the document you wish to use or click Use Blank Document and click **Done**.

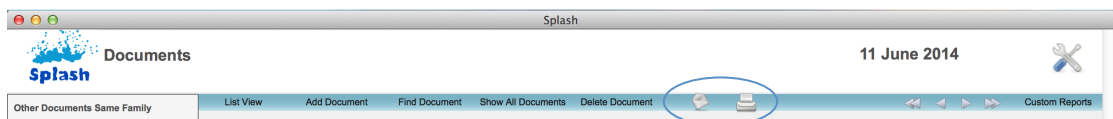
The 'Create Document' dialog box is shown. It has a title bar with 'Create Document' and a pencil icon. The main text says 'Create New Document'. Below this, it says 'Please select the template you would like to use, leave blank to begin with an empty document'. A dropdown menu is open, showing 'Happy Birthday' selected. At the bottom, there are 'Cancel' and 'Done' buttons. The 'Done' button has a green checkmark.

6. The selected document will be displayed on your screen.



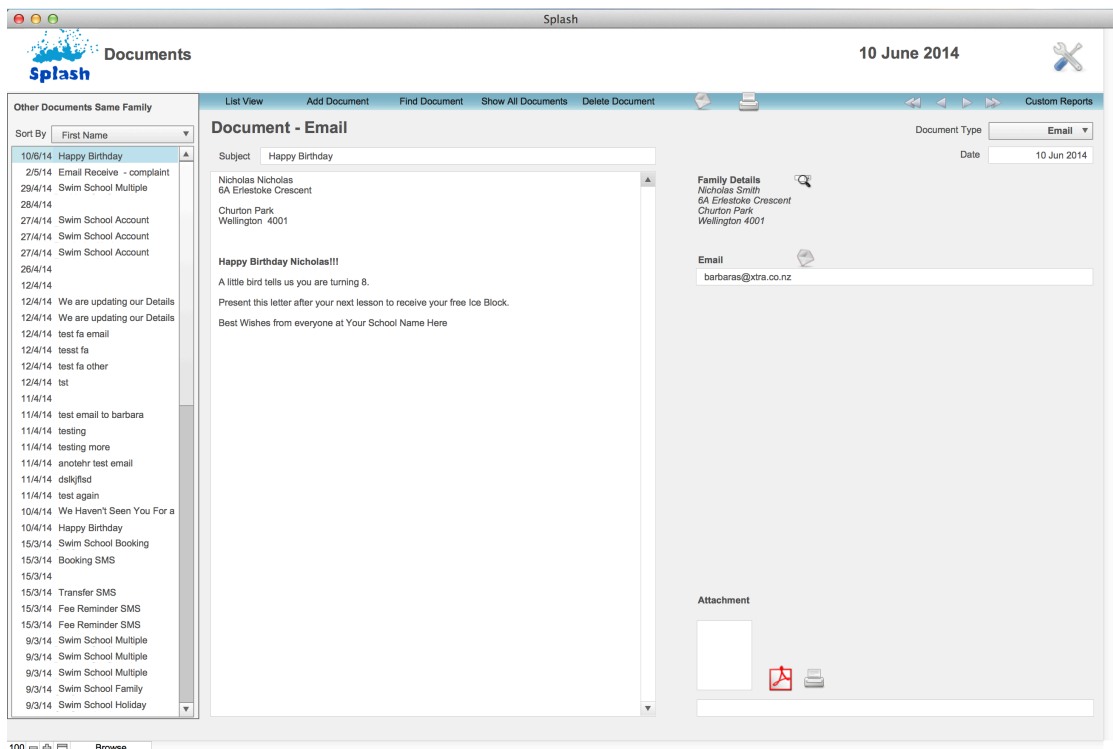
7. Edit the document as necessary.

8. Click the **Print** or **Email** button.



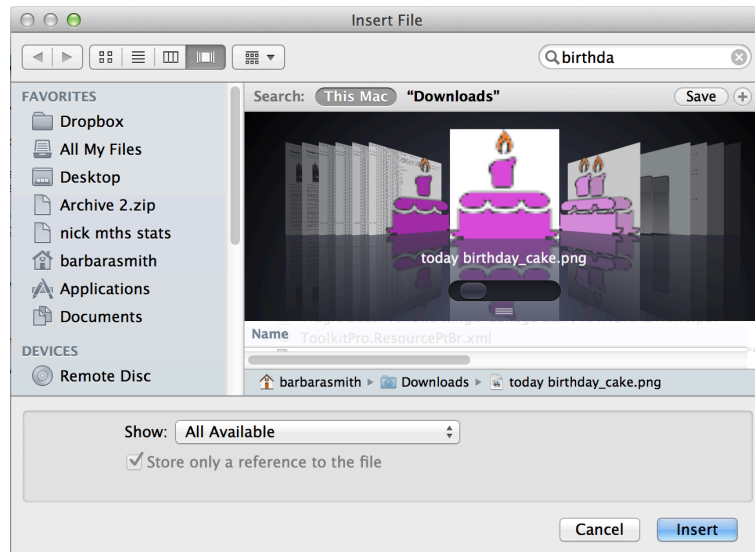
Adding an Attachment to an Email

When an email is created you have the option of including an attachment with your message. Although the attachment icon is displayed as a pdf symbol any document type can be attached.

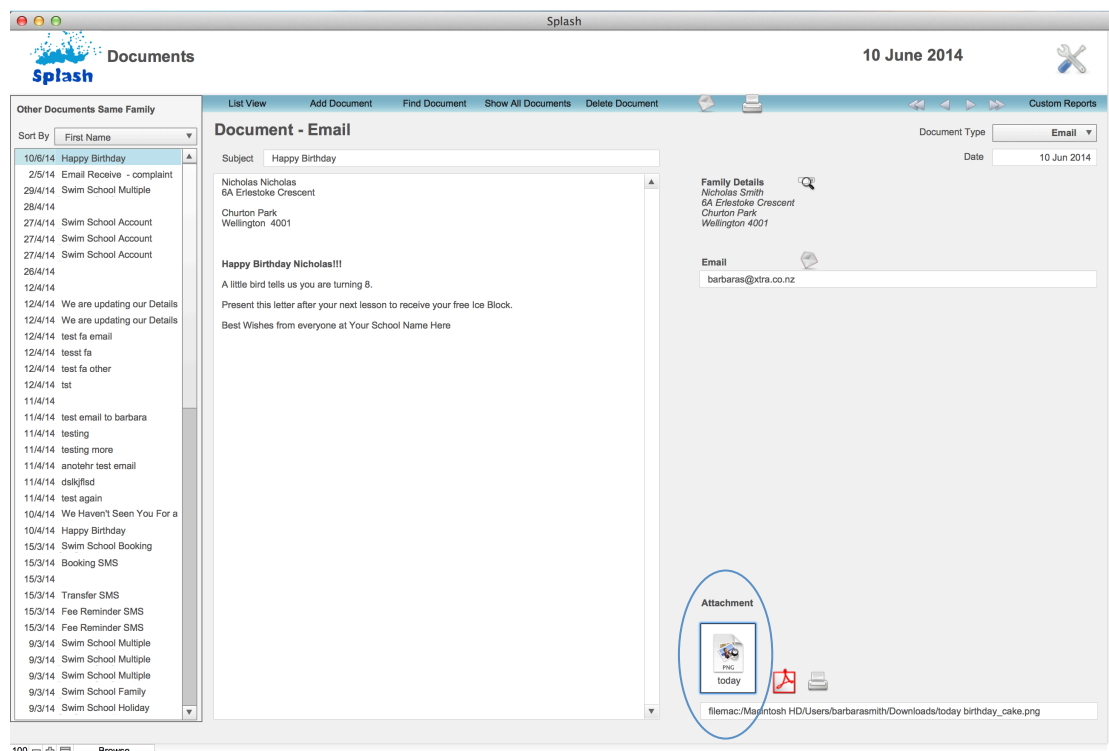


NB: The Attachment field and buttons are only displayed on screen for email documents.

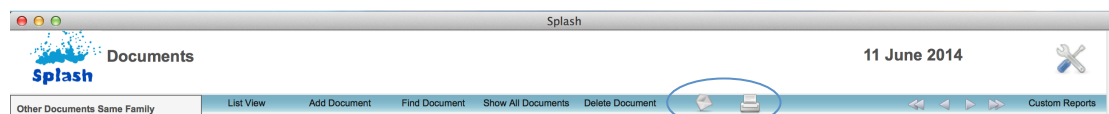
1. Ensure the correct email document is displayed on your screen.
2. Click once on the **Insert PDF** button.
3. The Insert File dialog will be displayed on your screen. Locate the file you wish to attach and click the Insert button.



4. The inserted document will appear in the Attachment field on the selected record.



5. Click the **Print** or **Email** button.



NB: The attachment is not printed if the print button is selected.

Changing the Status of a Student

Student records are all created with a status of Active. Over time however some students may leave the swim school either permanently or temporarily. Locating students based on term dates can be a little slower than using the active or inactive status field. After rollover and periodically during the term it is a good idea to update the student records to identify whether they are active or inactive. The following two commands reset the student status quickly for you.

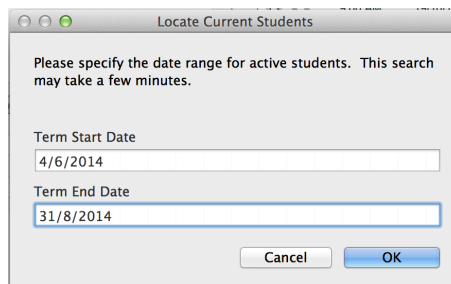
Changing a Group of Students to Active

This command identifies all students with a booking within a specified timeframe and sets the status to active. To use this command you simply need to know the start and end date of the current term.

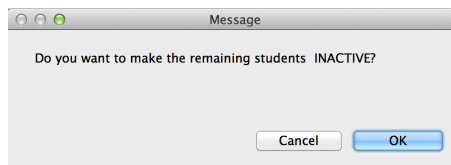
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Student** icon



3. Select **Set Students with Bookings to Active** from the Scripts menu.
4. The Locate Current Students dialog will be displayed on your screen. Simply enter the start date and end date of the term and click the OK button.
5. Splash will locate all of the students with a booking within the specified dates and set their status to "Active".

A screenshot of a dialog box titled 'Locate Current Students'. It contains the text: 'Please specify the date range for active students. This search may take a few minutes.' Below this text are two date input fields. The first field is labeled 'Term Start Date' and contains the date '4/6/2014'. The second field is labeled 'Term End Date' and contains the date '31/8/2014'. At the bottom right of the dialog are two buttons: 'Cancel' and 'OK'.

6. A dialog will then be displayed asking if you wish to set all the remaining students to "Inactive". Click OK if you wish to update the remaining records or Cancel to continue without amending the records.

A screenshot of a message dialog box titled 'Message'. It contains the text: 'Do you want to make the remaining students INACTIVE?'. At the bottom right of the dialog are two buttons: 'Cancel' and 'OK'.

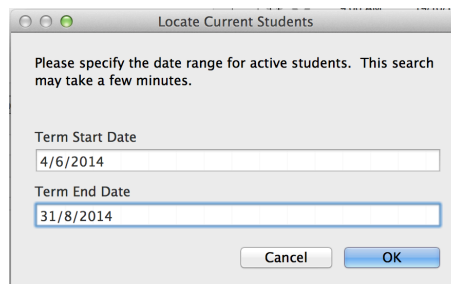
Changing a Group of Students to Inactive

The reverse of the command above; this command identifies all students with a booking within a specified timeframe and sets the remaining students to a status to active. To use this command you simply need to know the start and end date of the current term.

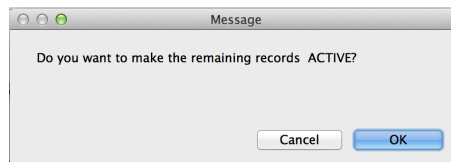
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Student** icon



3. Select **Set Students with Bookings to Active** from the Scripts menu.
4. The Locate Current Students dialog will be displayed on your screen. Simply enter the start date and end date of the term and click the OK button.
5. Splash will hide all of the students with a booking within the specified dates and set the remaining records to status "Active".



6. A dialog will then be displayed asking if you wish to set all the remaining students to "Active". Click OK if you wish to update the remaining records or Cancel to continue without amending the records.



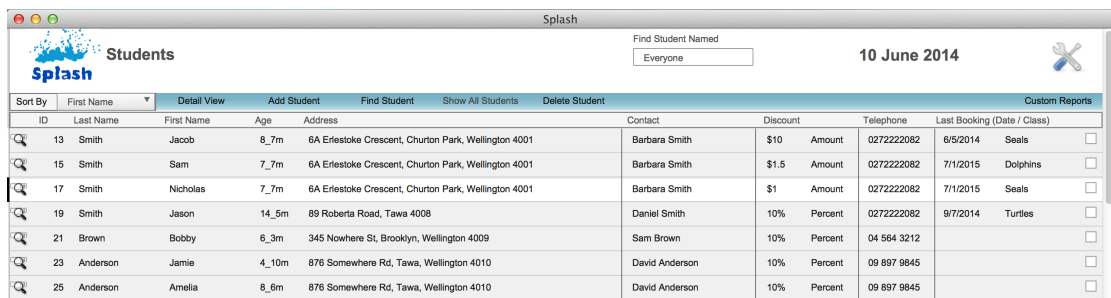
Sending a Broadcast SMS Message

A broadcast SMS is a single message sent to multiple recipients. A SMS message sent in this way will not be recorded on the student or family file.

Group SMS messages are sent to all recipients in the found set that have a valid mobile telephone number stored on file.

This function will only be successful if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

1. Use the **Finding a Student** function to locate the group of records you wish to send a message to. Locate only students with a mobile telephone number by placing an asterisk (*) in the mobile field along with any other find criteria.
2. The found set of records will be displayed in a list on your screen (if the list is incorrect repeat step 1).



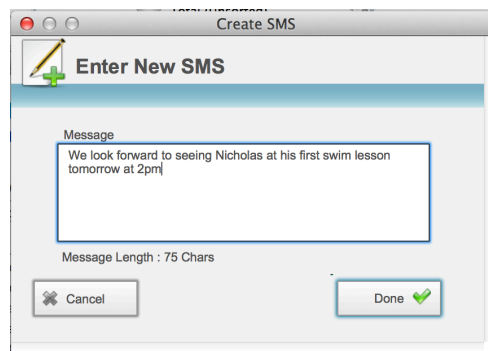
The screenshot shows the 'Students' window in the Splash application. At the top, there's a 'Find Student Named' field with 'Everyone' entered and a date '10 June 2014'. Below this is a table with columns: ID, Last Name, First Name, Age, Address, Contact, Discount, Telephone, Last Booking (Date / Class), and Custom Reports. The table lists several students, including Jacob Smith, Sam Smith, Nicholas Smith, Jason Smith, Bobby Brown, Jamie Anderson, and Amelia Anderson.

ID	Last Name	First Name	Age	Address	Contact	Discount	Telephone	Last Booking (Date / Class)	Custom Reports
13	Smith	Jacob	8_7m	6A Erlestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	\$10 Amount	0272222082	6/5/2014 Seals	<input type="checkbox"/>
15	Smith	Sam	7_7m	6A Erlestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	\$1.5 Amount	0272222082	7/1/2015 Dolphins	<input type="checkbox"/>
17	Smith	Nicholas	7_7m	6A Erlestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	\$1 Amount	0272222082	7/1/2015 Seals	<input type="checkbox"/>
19	Smith	Jason	14_5m	89 Roberta Road, Tawa 4008	Daniel Smith	10% Percent	0272222082	9/7/2014 Turtles	<input type="checkbox"/>
21	Brown	Bobby	6_3m	345 Nowhere St, Brooklyn, Wellington 4009	Sam Brown	10% Percent	04 564 3212		<input type="checkbox"/>
23	Anderson	Jamie	4_10m	876 Somewhere Rd, Tawa, Wellington 4010	David Anderson	10% Percent	09 897 9845		<input type="checkbox"/>
25	Anderson	Amelia	8_8m	876 Somewhere Rd, Tawa, Wellington 4010	David Anderson	10% Percent	09 897 9845		<input type="checkbox"/>

3. Select the **Scripts** menu... choose **Send SMS**...choose **Send SMS to Family [Found Set]**.
4. A dialog will be displayed on your screen warning that you are about to send multiple SMS messages. Click **OK** to continue or **Cancel** or exit the script.

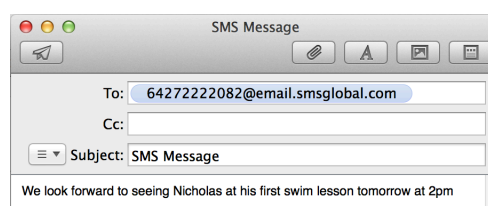


5. The **Enter New SMS** dialog will be displayed on your screen.



6. Enter the message you wish to send.
7. Click the **Done** button to send your message and return to the student entry screen.

NB: Each SMS message is sent via your email application as per the sample below.

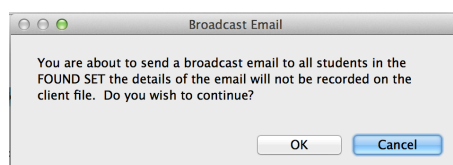


Sending a Broadcast Email

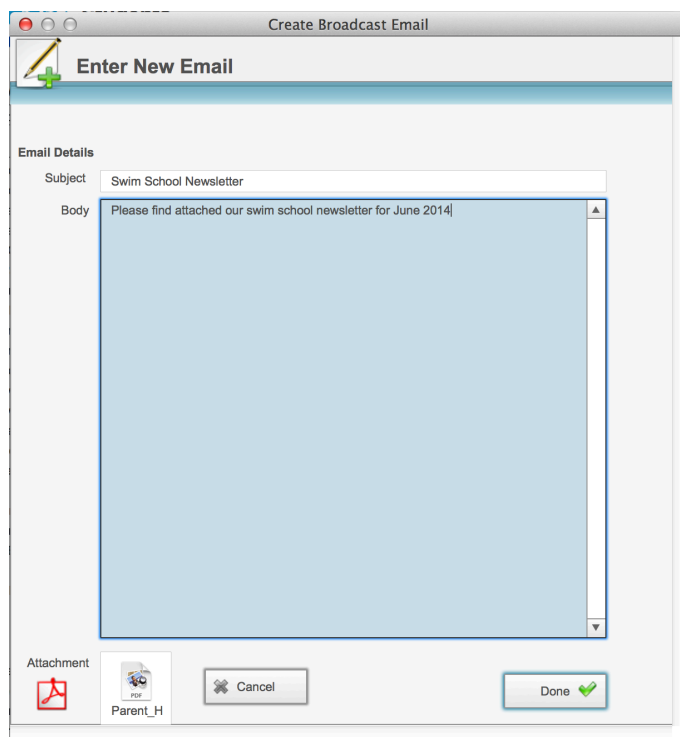
A broadcast email is a single email sent to multiple recipients. An email sent in this way will not be recorded on the family file.

Group email messages are sent to all recipients in the found set that have a valid email address stored on file.

1. Use the **Finding a Student** function to locate the group of records you wish to send a message to. Locate only students with an email address by placing an asterisk (*) in the email field along with any other find criteria.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Send Broadcast Email** from the **Scripts** Menu.



4. A dialog will be displayed on your screen warning that you are about to send multiple email messages. Click **OK** to continue or Cancel or exit the script.
5. The **Enter Broadcast Email** dialog will be displayed on your screen.



6. Enter the message you wish to sent and attach a document if required.
7. Click the **Send** button.

NB: To ensure the privacy of all clients the email address will automatically be placed in the BCC box. You can view the messages that have been sent if you look within the Sent Items folder of your email application.

Generating a Student Mail Merge

The mail merge function within Splash operates using a marked record system. All marked records will be included in the mail merge. Marked students appear in the Student listing with a cross in the box on the far right of the screen.

Splash

Students

Find Student Named

Everyone

10 June 2014

Sort By

First Name

▼

Detail View

Add Student

Find Student

Show All Students

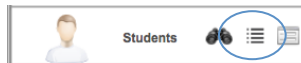
Delete Student

Custom Reports

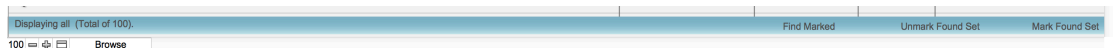
ID	Last Name	First Name	Age	Address	Contact	Discount	Telephone	Last Booking (Date / Class)					
	13	Smith	Jacob	8_7m	6A Eriestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	\$10	Amount	0272222082	6/5/2014	Seals		<input checked="" type="checkbox"/>
	15	Smith	Sam	7_7m	6A Eriestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	\$1.5	Amount	0272222082	7/1/2015	Dolphins		<input checked="" type="checkbox"/>
	17	Smith	Nicholas	7_7m	6A Eriestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	\$1	Amount	0272222082	7/1/2015	Seals		<input checked="" type="checkbox"/>
	19	Smith	Jason	14_5m	89 Roberts Road, Tawa 4008	Daniel Smith	10%	Percent	0272222082	9/7/2014	Turtles		<input checked="" type="checkbox"/>
	21	Brown	Bobby	6_3m	345 Nowhere St, Brooklyn, Wellington 4009	Sam Brown	10%	Percent	04 564 3212				<input type="checkbox"/>
	23	Anderson	Jamie	4_10m	876 Somewhere Rd, Tawa, Wellington 4010	David Anderson	10%	Percent	09 897 9845				<input type="checkbox"/>
	25	Anderson	Amelia	8_6m	876 Somewhere Rd, Tawa, Wellington 4010	David Anderson	10%	Percent	09 897 9845				<input type="checkbox"/>
	27	zimmerman	Zac	6_5m	786 another road, Porirua, Wellington 4008	Andy zimmerman	10%	Percent	09 765 1445	10/2/2014	Dolphins		<input checked="" type="checkbox"/>

Creating a mail merge is a two step process; the first step involves identifying the students you wish to receive the merge document, the second step involved writing the document you wish to send.

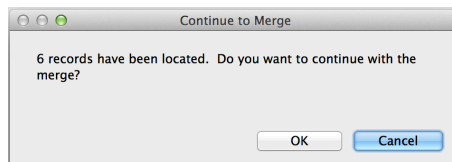
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Student List** icon



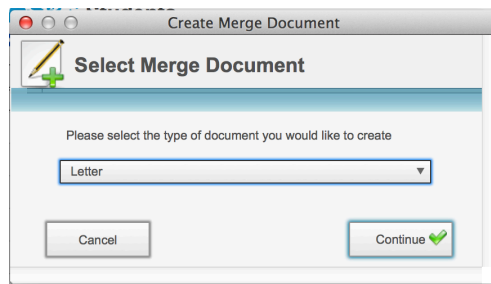
3. The Student List View screen will be displayed.
4. Click once on the **Find Marked** button displayed at the bottom right of the screen. This command will display a list of all students that are currently marked.
5. Click once on the **Unmarked Found Set** button. This will clear all settings for previously marked records.



6. Use the **Finding a Student** function to locate the group of records you wish to send a message to.
7. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 4)
8. Click once on the **Mark Found Set** button to select the records for the mail merge. A cross should appear for each student in the Mark column on the right of the screen.
9. Repeat steps 4 to 6 above until all required students have been marked.
10. Select **Perform Mail Merge** from the Scripts menu.
11. A dialog will be displayed advising the number of records which have been selected for the mail merge. Click OK if this number is correct, or click Cancel to exit the script and begin again at step 1.



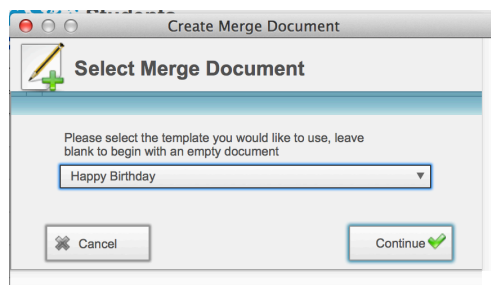
12. The **Create Merge Document** dialog will be displayed asking you to define the type of document you wish to create. Select the required type of document from the drop-down menu provided.



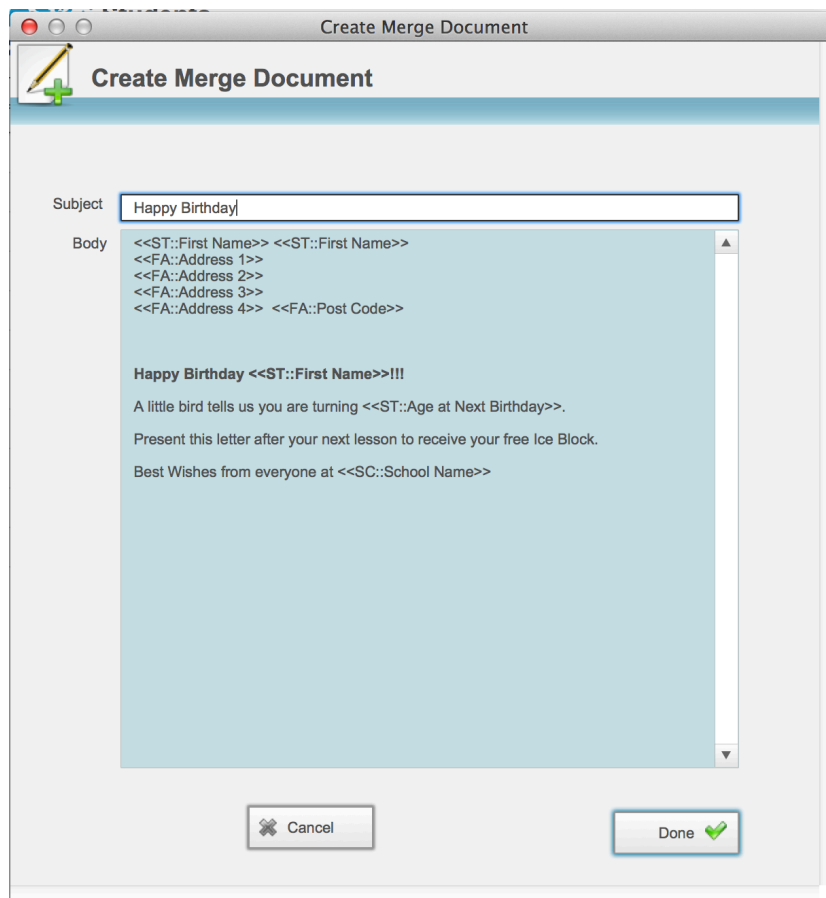
13. Click the **Continue** button.

14. The **Create Merge Document** dialog box will be displayed on your screen. Select the template you wish to use or click Use Blank Document

15. Click the **Continue** button.



16. The selected template will be displayed on your screen. Edit the content of the template as required.



17. Click the **Done** button to complete the merge or Cancel to exit the script with making a change.

NB: If Done was selected at step 17 a personalised document will be created for each family, it will automatically be printed or emailed. A copy of each document will be placed on the respective Family record.

Importing Student Data

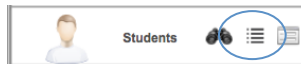
When you import data, you're bringing data from another file into Splash. When you import data into an existing FileMaker Pro file, you can:

- add new records from the source file
- update records with information from the source file
- update matching records with information from the source file

Importing Records from Excel

9. Click once on the **Splash** icon on the top left corner of your screen.

10. Select the **Students List** icon

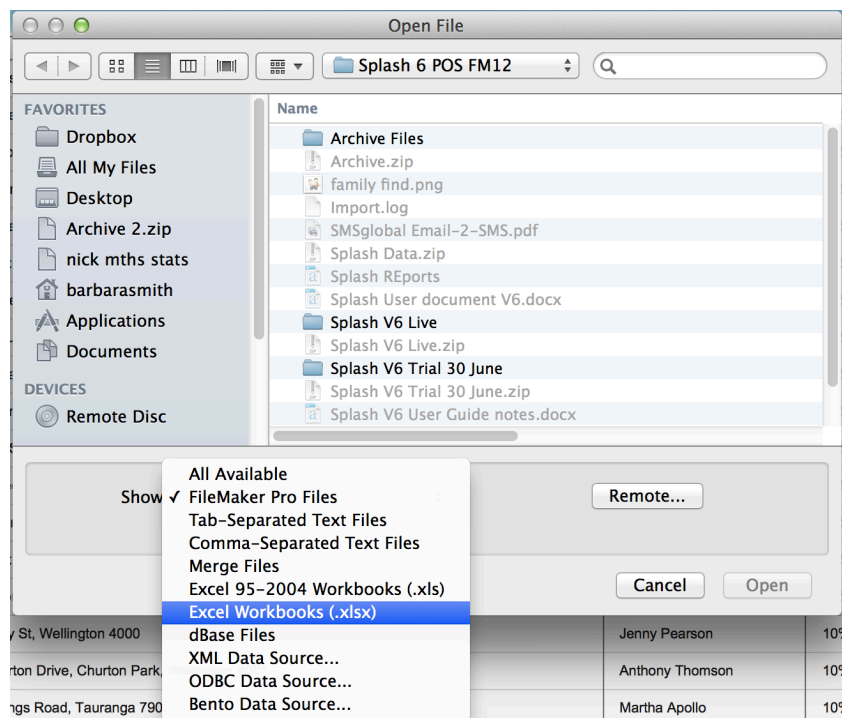


11. The Student List View screen will be displayed.

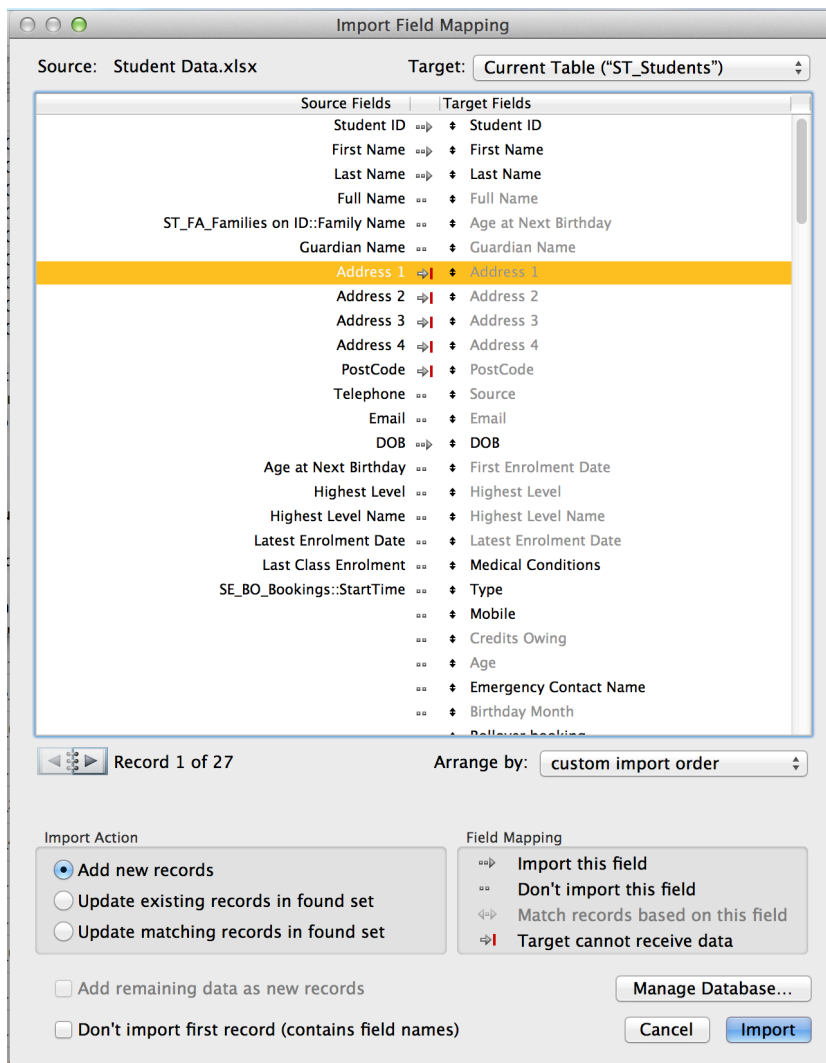
12. Select **Import Student Data** from the **Scripts** menu.

13. The **Open File** dialog will be displayed on your screen.

14. Locate the file containing the data you wish to import and click the **Open** button.



15. The Import Field Mapping dialog will be displayed on your screen.



16. In the **Import Action** area, choose the type of import to perform.

To add new records to the end of the target file – select **Add New Records**



To update the found set of records in the target file with the records you're importing – select **Update existing records in found set**.

To update data in the target file with the data from matching records in the source – select **Update matching records in the found set**.

12. If the first record of the data you're importing contains field names (column headings) instead of data, select **Don't import first record (contains field names)**.

Selecting **Don't import first record (contains field names)** skips the first record during import.

13. Drag fields in the **Target Field** column to align with fields in the **Source Field** column to indicate where data will be imported or updated.

To align a field, move the pointer over the  icon next to a target field name in the list. When the pointer changes to a double arrow , drag the field to a new location.

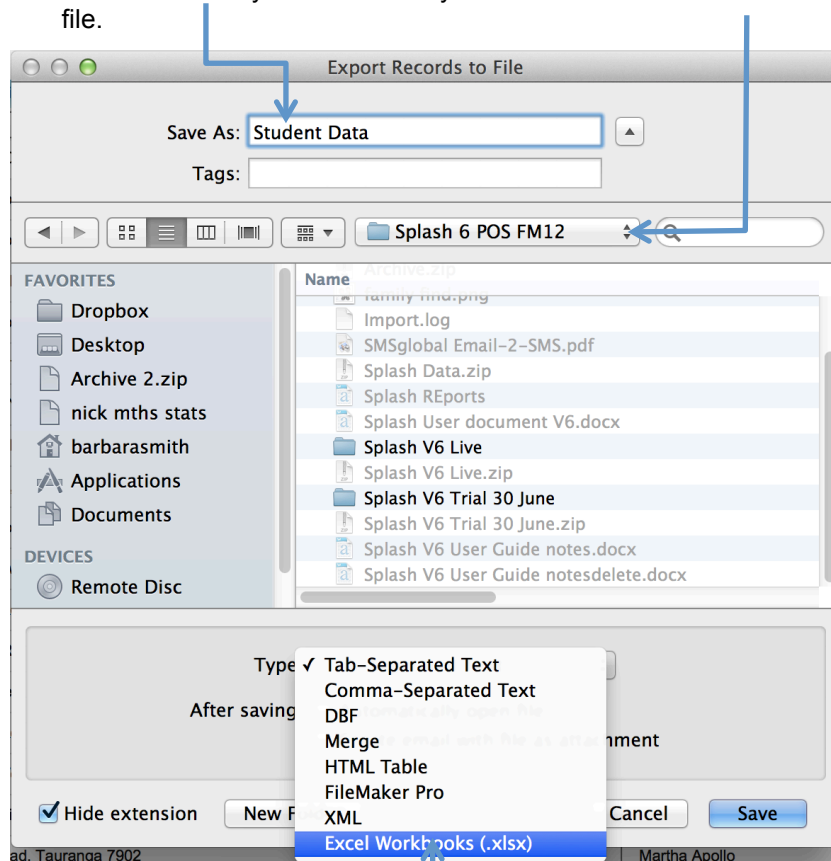
14. When all fields have been aligned correctly, click the **Import** button.

Exporting Student Data

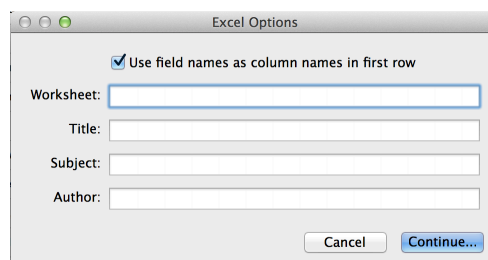
You can export Splash data to a new file and then open it in another application. For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

Exporting Records to Excel

14. Use the **Finding a Student** function to locate the group of records you wish to export.
15. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
16. Select **Export Student Data** from the **Scripts** menu.
17. The **Export Records to File** dialog will be displayed on your screen.
18. Enter the name you wish to call your file and choose a location to store the file.



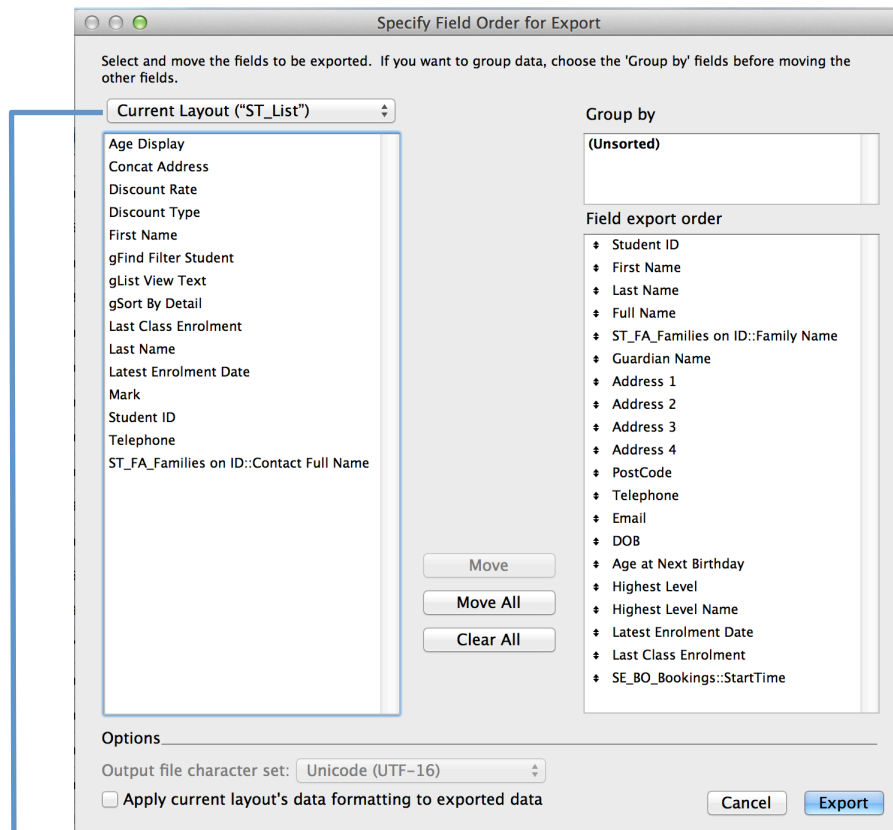
19. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
20. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



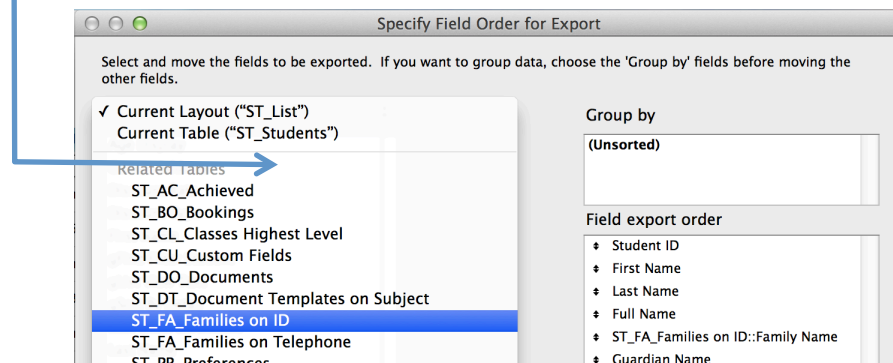
21. The **Specify Field Order for Export** dialog will be displayed on your screen. Use this dialog to indicate the order of the fields in which Splash will export the data.

22. All fields displayed in the **Field Export Order** list will be exported.

23. To move a field to the **Field Export Order** simply double-click the field name on the left of the screen.



24. To include a related field choose the name of the related table from the list in the upper left of the dialog, then double-click the required field.



25. When all the required fields are displayed in the **Field Export Order** list click the **Export** button.

26. The Excel file will be saved to your computer ready for use.

Student ID	First Name	Last Name	Full Name	FA_Families on ID::Family Name	Guardian Name	Address 1	Address 2	Address 3	Wellington
13	Jacob	Smith	Jacob Smith	Smith	Barbara Smith	6A Eristoke Crescent	Tawa	Churton Park	Wellington
19	Jason	Smith	Jason Smith	Smith	Daniel Smith	89 Roberts Road	Tawa		Wellington
27	Zac	zimmerman	Zac zimmerman	zimmerman	Andy zimmerman	786 another road	Porirua		Wellington
39	Jane	White	Jane White	White	Julie White	76 Moorefield Road	Johnsonville		Wellington
41	Phillip	Smith	Phillip Smith	Smith	Daniel Smith	89 Roberts Road	Tawa		Wellington
43	Jonathan	Fairbrother	Jonathan Fairbrother	Fairbrother	Mark Fairbrother	56 Watt St	Tatahi Bay		Wellington
47	Hayden	Hughson	Hayden Hughson	Hughson	Ngaire Hughson	98 Barrett St	Ngalo		Wellington
49	Hamish	McDougal	Hamish McDougal	McDougal	Mary McDougal	118 South St	Newlands		Wellington
53	Benjamin	Williams	Benjamin Williams	Williams	Melcolm Williams	172 Chapel St	Khandallah		Wellington
69	Bridgette	Robinson	Bridgette Robinson	Robinson	Nicola Robinson	46 Hillcrest Road	Johnsonville		Wellington
75	Stuart	Sinclair	Stuart Sinclair	Sinclair	Linley Sinclair	3 Main St	Tawa		Wellington
81	Tracey	O'Donnell	Tracey O'Donnell	O'Donnell	Patricia O'Donnell	87 Alfredson Rd	Kelburn		Wellington
87	Sarah	Nightingale	Sarah Nightingale	Nightingale	Barbara Nightingale	15 Albert St	Redwood		Wellington
97	Gaylene	Patterson	Gaylene Patterson	Patterson	Mary Patterson	76 Kent St	Newlands		Wellington
99	Amelia	Harper	Amelia Harper	Harper	Edith Harper	76 Colombo Road	Tawa		Wellington
119	stuart	pearson	stuart pearson	Pearson	Jenny Pearson	456 Any St	Wellington		Wellington

Printing Student Reports

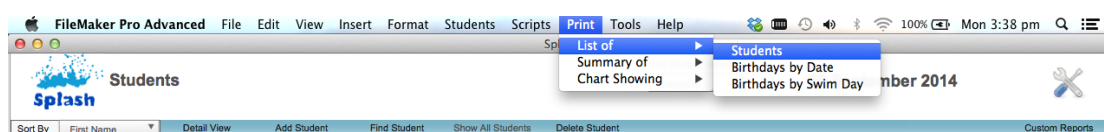
You must be in the Student module of Splash to generate the following reports: All reports are displayed in the Print menu.

Printing a List of Students

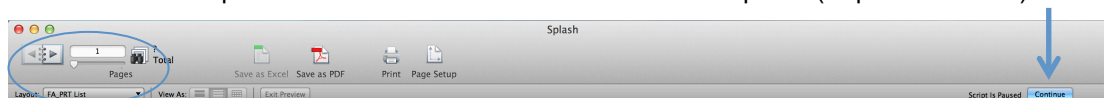
This report provides a listing of student ID, address and contact details, it should be printed and kept as a reference guide and backup of your system.

This report provides a listing of family ID, address and contact details, it should be printed and kept as a reference guide for making bookings.

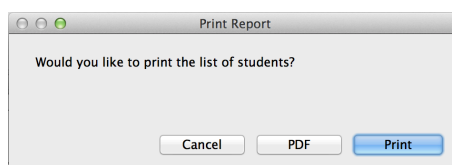
9. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
10. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
11. Select **List of ...** from the Print menu and select **Students** from the pop-out menu displayed.



12. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



13. The **Print Report** dialog will be displayed on your screen.



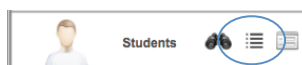
14. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

List of Students					
			Last Enrolment	Last Class	Total Number of Bookings
David King	46 Brooklyn Rd, Brooklyn, Wellington 4008	05 678 4564	9/1/15	Dolphins	20
Hamish McDougal	118 South St, Newlands, Wellington 4006	04 478 3156	10/2/14	Turtles	7
Hayden Hughson	98 Barrett St, Ngaio, Wellington 4007	04 654 9524	9/7/14	Seals	0
Jacob Smith	6A Erlestoke Crescent, Churton Park, Wellington 4001	0272222082	6/5/14	Seals	18
Jane White	76 Moorefield Road, Johnsonville, Wellington 4001	04 675 1432	28/5/14	Turtles	1
Jason Smith	89 Roberta Road, Tawa 4008	0272222082	9/7/14	Turtles	0
Nicholas Smith	6A Erlestoke Crescent, Churton Park, Wellington 4001	0272222082	7/1/15	Seals	5
Phillip Smith	89 Roberta Road, Tawa 4008	0272222082	6/2/14	Turtles	7
Sally Anderson	876 Somewhere Rd, Tawa, Wellington 4010	09 897 9845	11/1/15	Turtles	19
Sam Smith	6A Erlestoke Crescent, Churton Park, Wellington 4001	0272222082	7/1/15	Dolphins	23
Zac zimmerman	786 another road, Porirua, Wellington 4008	09 765 1445	10/2/14	Dolphins	8

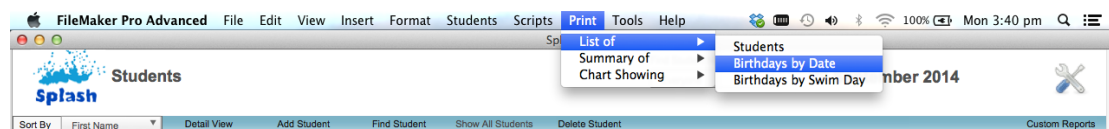
Printing a Birthday List by Date

This report displays a list of student birthdays. The report will be sorted by the date of each child's birthday.

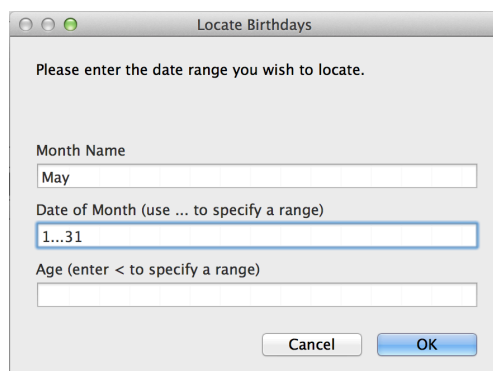
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Students List** icon



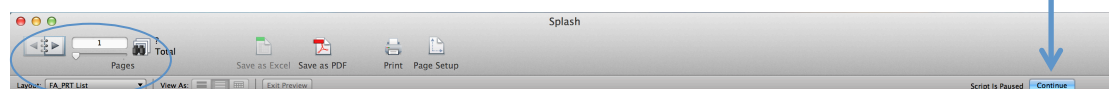
3. The Student List View screen will be displayed.
4. Select **List of ...** from the Print menu and select **Birthdays by Date** from the pop-out menu displayed.



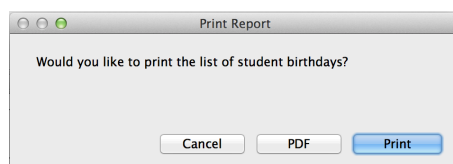
5. The Locate Birthdays dialog will be displayed on your screen. Enter the Month Name, Date(days) of the month, and age criteria for who should be included in the report..



6. Click OK to locate the swimmers with birthdays and preview the report.
7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



8. The **Print Report** dialog will be displayed on your screen.



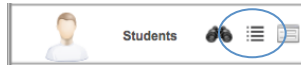
9. Click OK to print the report or Cancel to return to your original screen without printing.

List of Student Birthdays						
May						
1 st	Billy Jones	is turning	3	Sun	10:30 AM	Seals
1 st	Jennifer Smith	is turning	5	Sun	9:30 AM	Dolphins
6 th	Hayden Hughson	is turning	10	Wed	10:30 AM	Seals
23 rd	john mcdougal	is turning	5			

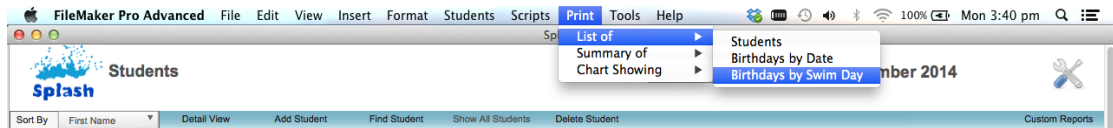
Printing a Birthday List by Swim Day

This report displays a list of student birthdays. The students in the report are grouped by the day each child swims.

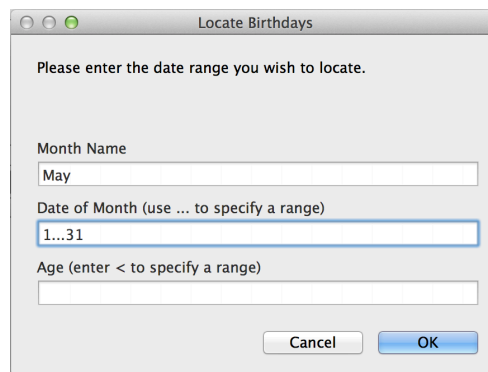
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Students List** icon



3. The Student List View screen will be displayed.
4. Select **List of ...** from the Print menu and select **Birthdays by Swim Day** from the pop-out menu displayed.



5. The Locate Birthdays dialog will be displayed on your screen. Enter the Month Name, Date (days) of the month, and age criteria for who should be included in the report..



Locate Birthdays

Please enter the date range you wish to locate.

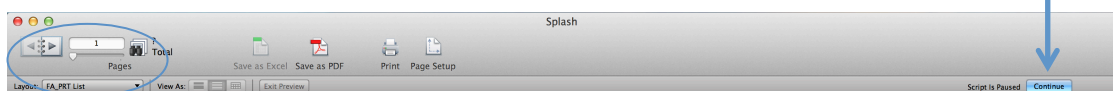
Month Name
May

Date of Month (use ... to specify a range)
1...31

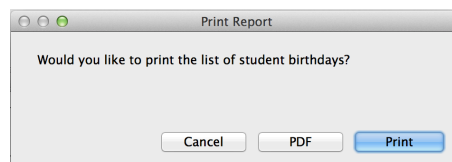
Age (enter < to specify a range)

Cancel OK

6. Click OK to locate the swimmers with birthdays and preview the report.
7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



8. The **Print Report** dialog will be displayed on your screen.

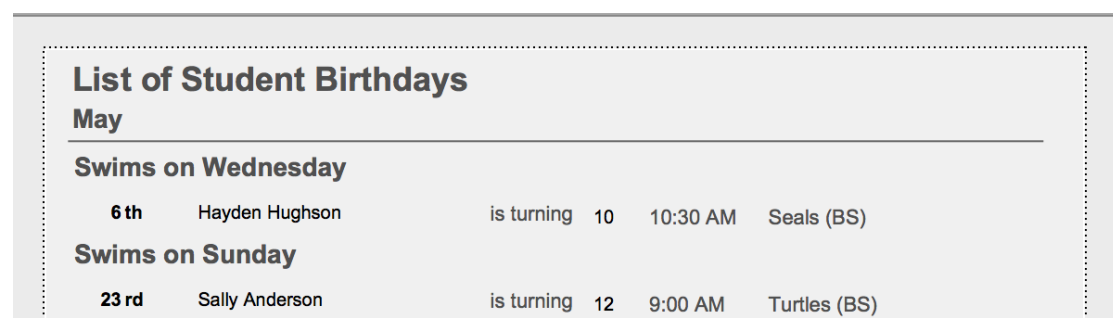


Print Report

Would you like to print the list of student birthdays?

Cancel PDF Print

9. Click OK to print the report or Cancel to return to your original screen without printing.

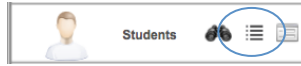


List of Student Birthdays					
May					
Swims on Wednesday					
6 th	Hayden Hughson	is turning	10	10:30 AM	Seals (BS)
Swims on Sunday					
23 rd	Sally Anderson	is turning	12	9:00 AM	Turtles (BS)

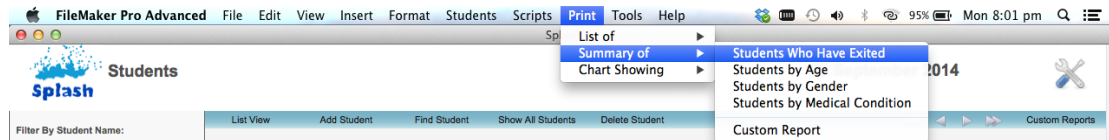
Printing a Summary of Students Who Have Exited

This report displays a list of students whose last booking was within a specified timeframe. This search compares the last booking date which is stored on the client file with the date range you have specified.

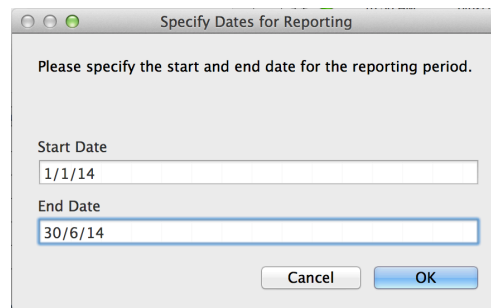
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Students List** icon



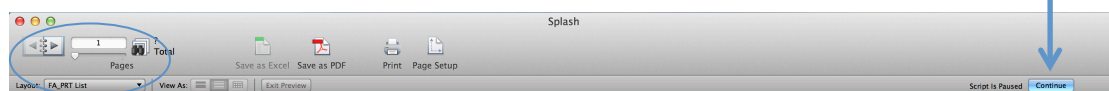
3. The Student List View screen will be displayed.
4. Select **Summary of ...** from the Print menu and select **Students by Date Exited** from the pop-out menu displayed.



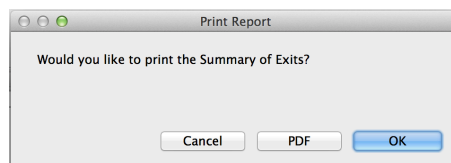
5. The Specify Dates for Reporting dialog will be displayed on your screen. Start Date and End Date criteria for who should be included in the report..



6. Click OK to locate the swimmers exited in the specified timeframe and preview the report.
7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



8. The **Print Report** dialog will be displayed on your screen.



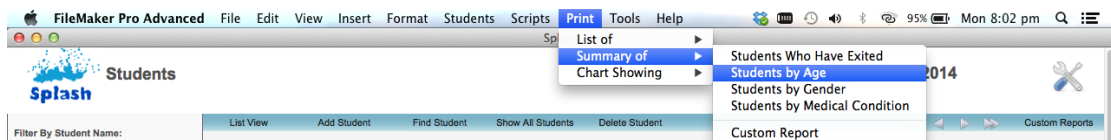
9. Click OK to print the report or Cancel to return to your original screen without printing.

Summary of Students		
Summary of Exits	Number of Students	Number of Bookings
Monday	6	18
Dolphins	2	9
Seals	1	1
Sharks	1	0
Turtles	2	8
Thursday	1	7
Turtles	1	7
Tuesday	3	20
Dolphins	1	0

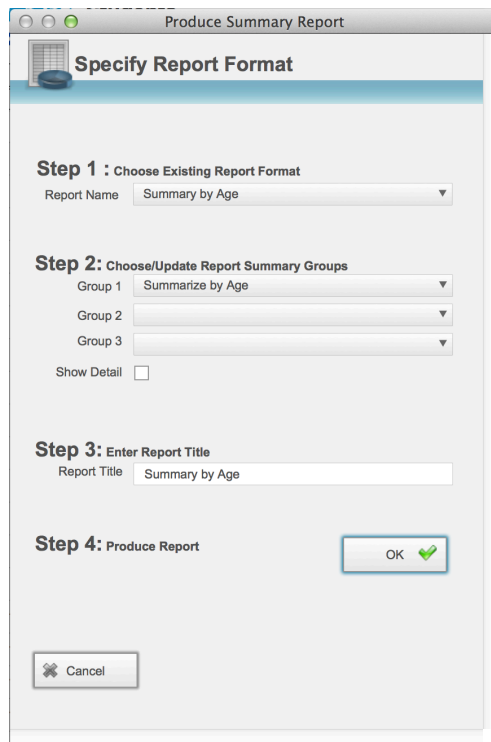
Printing a Summary of Students by Age

This report displays a list of students by current age. The report will include a summary of all records in the found set.

1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Students by Age** from the pop-out menu displayed.



4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
 Step 1 = Summary by Age
 Step 2 = Group 1 set to Summarize by Age
 Step 3 = Report Name set to Summary by Age
6. Amend any of the above steps or include additional grouping options at Step 2.
7. Click the OK button.



Produce Summary Report

Specify Report Format

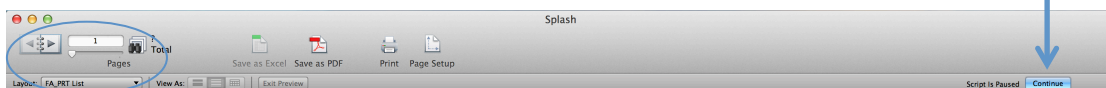
Step 1 : Choose Existing Report Format
 Report Name: Summary by Age

Step 2: Choose/Update Report Summary Groups
 Group 1: Summarize by Age
 Group 2:
 Group 3:
 Show Detail: ☐

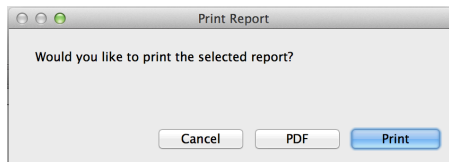
Step 3: Enter Report Title
 Report Title: Summary by Age

Step 4: Produce Report
 OK ☒
 Cancel

8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



9. The **Print Report** dialog will be displayed on your screen.



Print Report

Would you like to print the selected report?

Cancel PDF Print

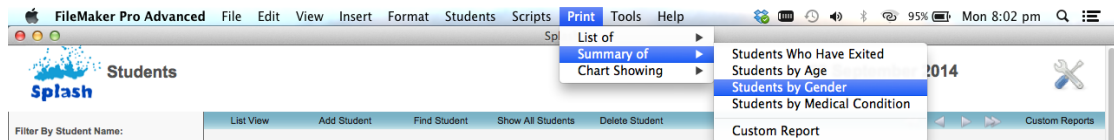
10. Click OK to print the report or Cancel to return to your original screen without printing.

Summary of Students		
Summary by Age		
	Number of Students	Number of Bookings
1 Years	1	0
10 Years	1	1
11 Years	2	4
12 Years	1	1
13 Years	2	10
14 Years	1	0
2 Years	1	7
3 Years	2	0
4 Years	2	0

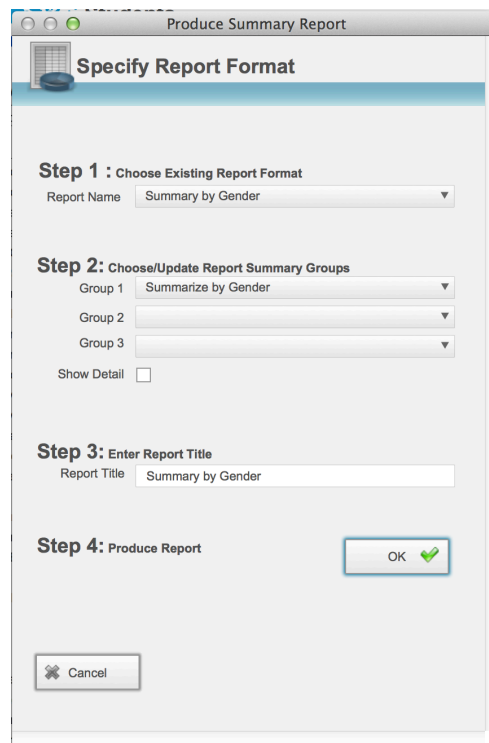
Printing a Summary of Students by Gender

This report displays a list of students by gender. The report will include a summary of all records in the found set.

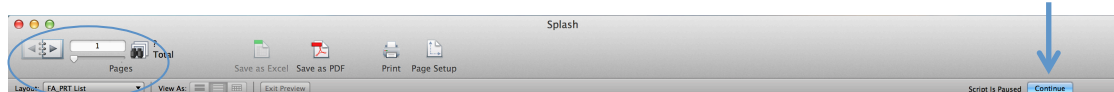
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Students by Gender** from the pop-out menu displayed.



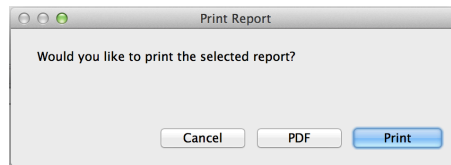
4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary by Gender
Step 2 = Group 1 set to Summarize by Gender
Step 3 = Report Name set to Summary by Gender
6. Amend any of the above steps or include additional grouping options at Step 2.
7. Click the OK button.



8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



9. The **Print Report** dialog will be displayed on your screen.



10. Click OK to print the report or Cancel to return to your original screen without printing.

Summary of Students		
Summary by Gender		
	Number of Students	Number of Bookings
Female	30	255
Male	46	318

NB: To include a list of student names, click Show Detail at Step 2.

 A dialog box titled "Produce Summary Report" with a sub-header "Specify Report Format". It contains two steps:

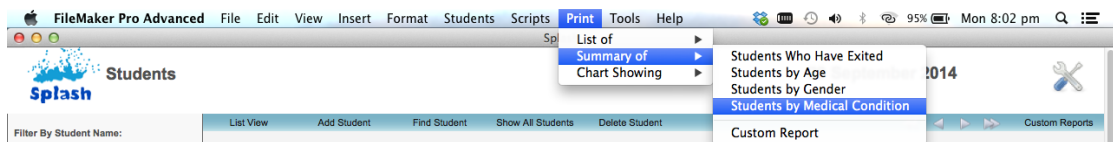
- Step 1: Choose Existing Report Format**
 - Report Name: Summary by Gender (dropdown menu)
- Step 2: Choose/Update Report Summary Groups**
 - Group 1: Summarize by Gender (dropdown menu)
 - Group 2: (empty dropdown menu)
 - Group 3: (empty dropdown menu)
 - Show Detail: ☒

Summary of Students				
Summary by Gender			Number of Students	Number of Bookings
Female			30	255
Amanda zimmerman	786 another road, Porirua, Wellington 4008		09 765 1445	
Amelia Anderson	876 Somewhere Rd, Tawa, Wellington 4010		09 897 9845	
Amelia Harper	76 Colombo Road, Tawa, Wellington 4010		04 236 4567	0
Ann Patterson	76 Kent St, Newlands, Wellington 4008		027 2222082	0
Bridgette Robinson	46 Hillcrest Road, Johnsonville, Wellington 4007		04 478 2491	9
Caroline Thomson	25 Churton Drive, Churton Park, Wellington 4001		027 2222082	20
Celia Brown	345 Nowhere St, Brooklyn, Wellington 4009		04 564 3212	20

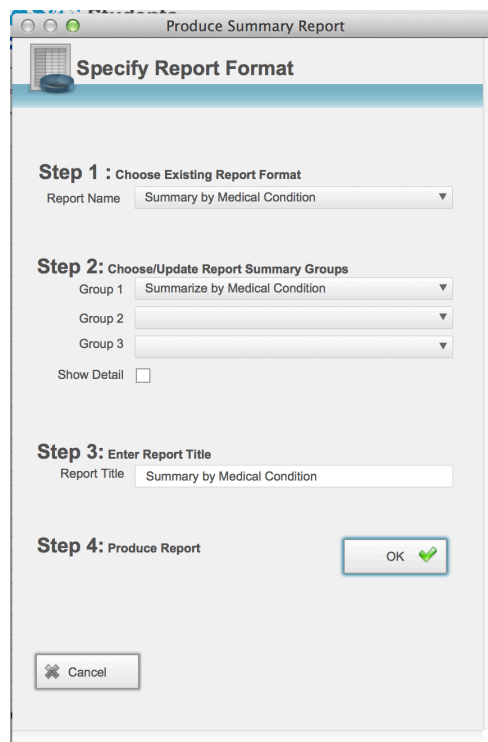
Printing a Summary of Students by Medical Condition

This report displays a list of students by medical condition. The report will include a summary of all records in the found set.

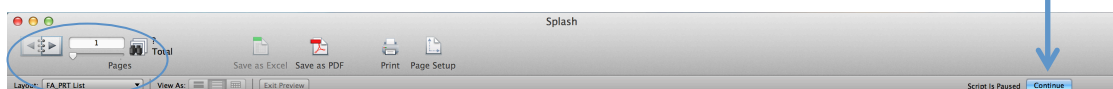
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report. Place an asterisk (*) in the medical condition field if you are looking for everyone with a medical condition.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Students by Medical Condition** from the pop-out menu displayed.



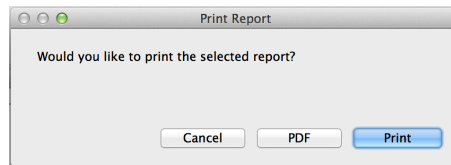
4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary by Medical Condition
Step 2 = Group 1 set to Summarize by Medical Condition
Step 3 = Report Name set to Summary by Medical Condition
6. Amend any of the above steps or include additional grouping options at Step 2.
7. Click the OK button.



8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



9. The **Print Report** dialog will be displayed on your screen.



10. Click OK to print the report or Cancel to return to your original screen without printing.

Summary of Students		
Summary by Medical Condition		
	Number of Students	Number of Bookings
ADHD	1	
Allergies	1	12
Asthma	14	132
disorder	1	1
Glasses	2	5
Impaired Hearing	1	31
Wears Glasses	1	1

NB: To include a list of student names, click Show Detail at Step 2.

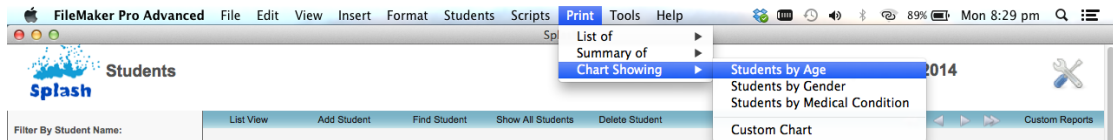
Summary of Students		
Summary by Medical Condition		
	Number of Students	Number of Bookings
ADHD	1	
Jamie Anderson 876 Somewhere Rd, Tawa, Wellington 4010	09 897 9845	
Allergies	1	12
Bobby Thomson 25 Churton Drive, Churton Park, Wellington 4001	027 2222082	12
Asthma	14	132
Ann Patterson 76 Kent St, Newlands, Wellington 4008	027 2222082	0
Billy Jones 123 Any St, Wellington	1234 567	20
Georgia Taylor 79 Main St, Tawa, Wellington 4010	04 236 9137	17
Jason Smith 89 Roberta Road, Tawa 4008	0272222082	0
Johnny Crandley 123 Any St, Wellington		
Jonathan Fairbrother 56 Watt St, Tatahi Bay, Wellington 4012	04 789 4568	0

Printing Student Charts

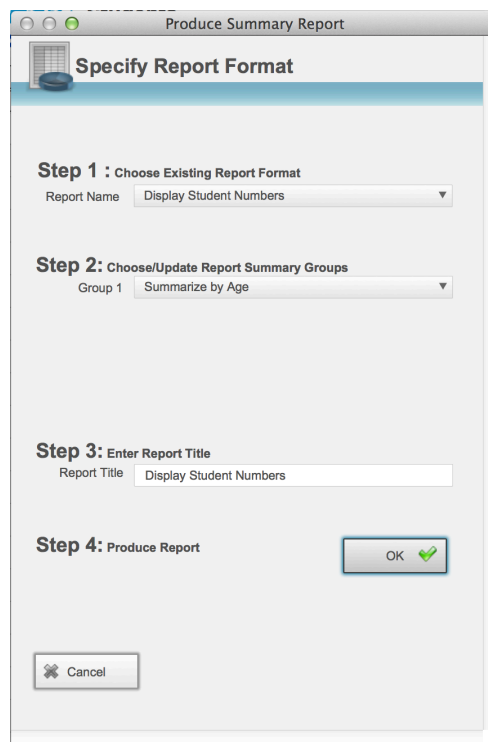
Printing a Chart Showing Students by Age

This report displays a graphical representation of students by age. The report will include a summary of all records in the found set.

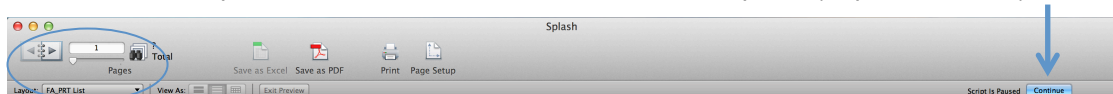
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Students by Age** from the pop-out menu displayed.



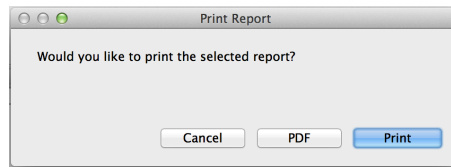
4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Display Student Numbers
Step 2 = Group 1 set to Summarize by Age
Step 3 = Report Name set to Display Student Numbers
6. Amend the grouping options at step 2 or change the report title.
7. Click the OK button.



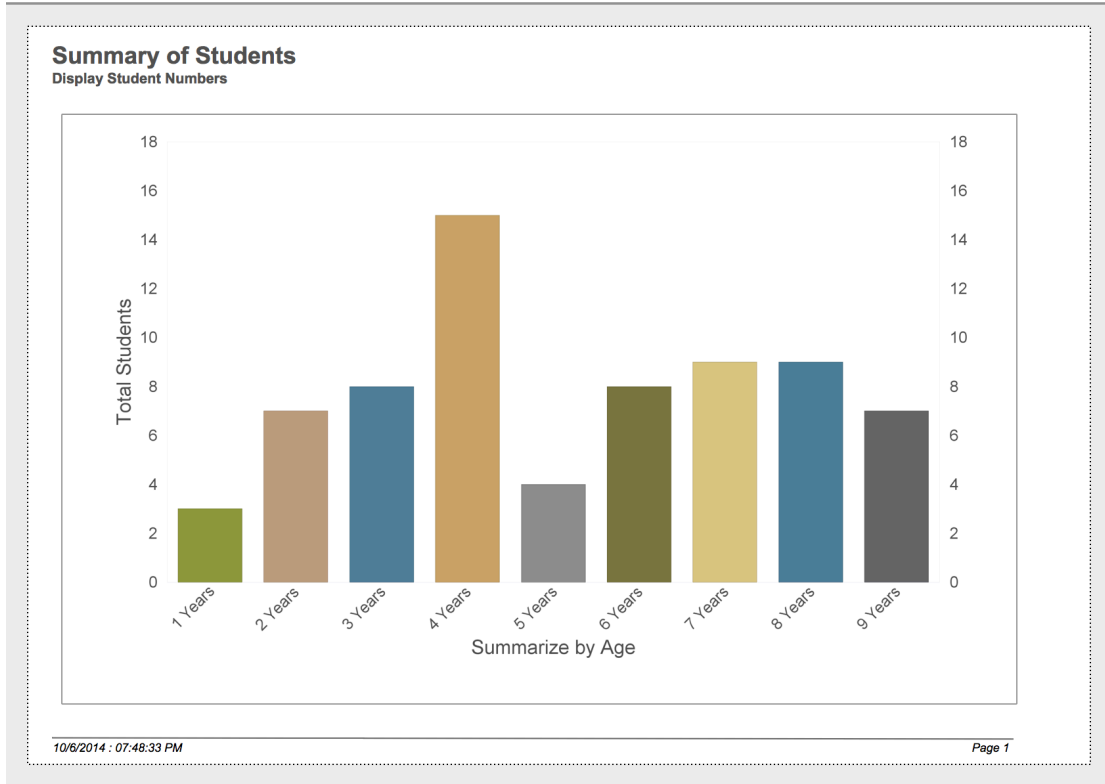
8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



9. The **Print Report** dialog will be displayed on your screen.



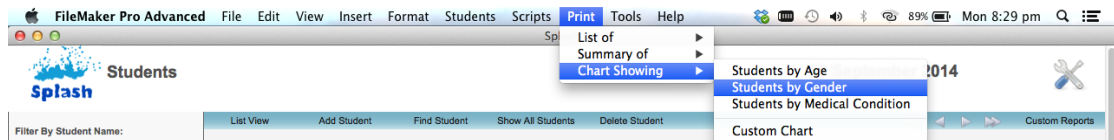
10. Click OK to print the report or Cancel to return to your original screen without printing.



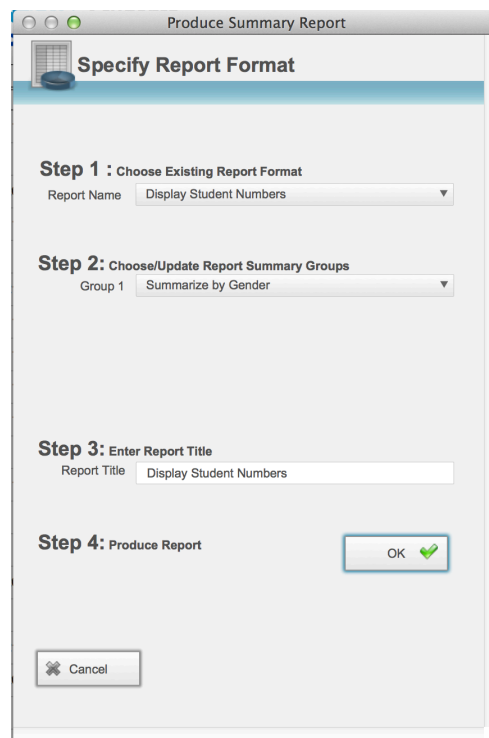
Printing a Chart Showing Students by Gender

This report displays a graphical representation of students by gender. The report will include a summary of all records in the found set.

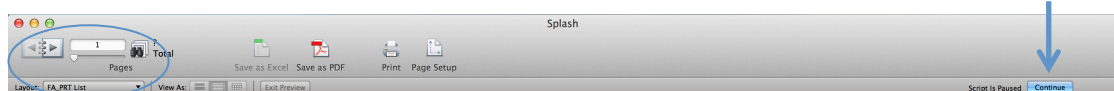
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Students by Gender** from the pop-out menu displayed.



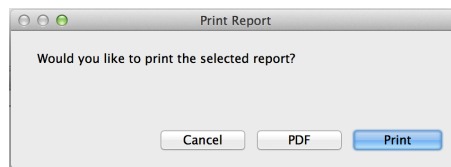
4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Display Student Numbers
Step 2 = Group 1 set to Summarize by Gender
Step 3 = Report Name set to Display Student Numbers
6. Amend the grouping options at step 2 or change the report title.
7. Click the OK button.



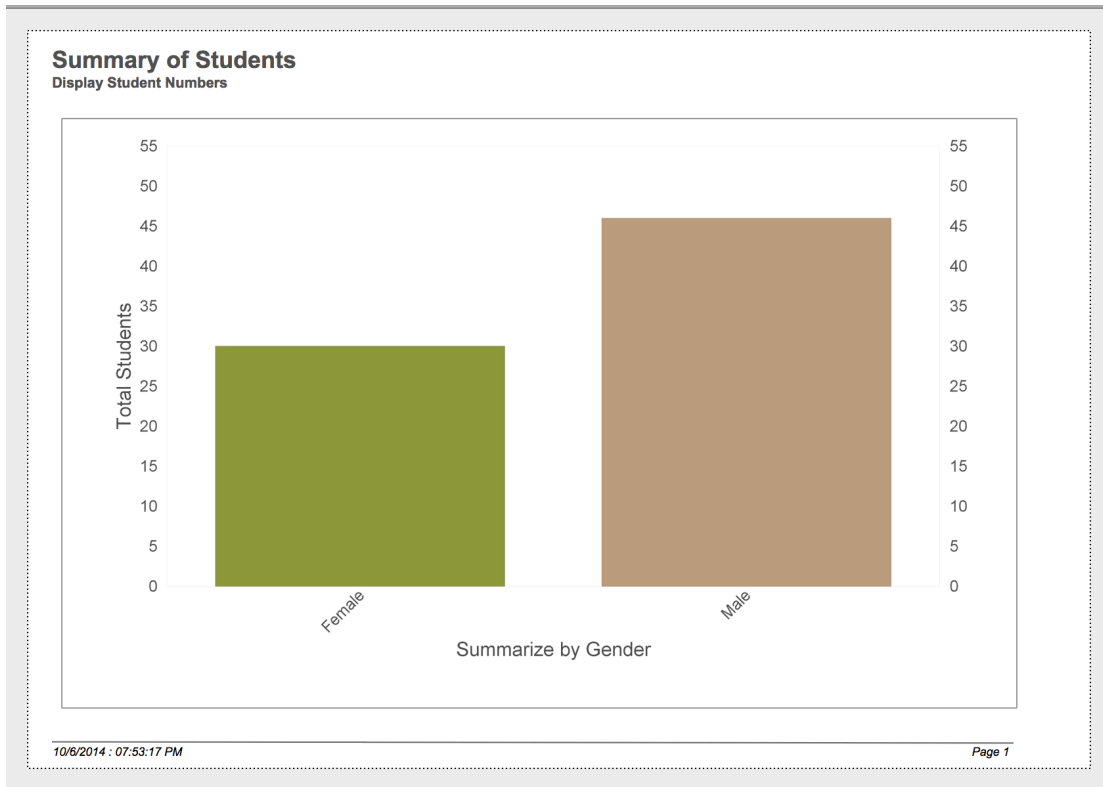
8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



9. The **Print Report** dialog will be displayed on your screen.



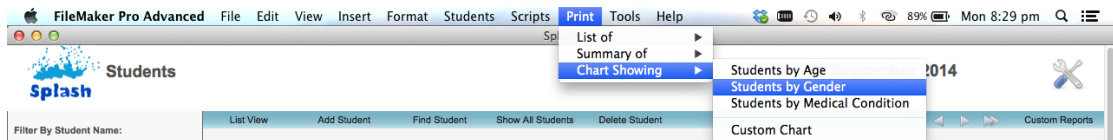
10. Click OK to print the report or Cancel to return to your original screen without printing.



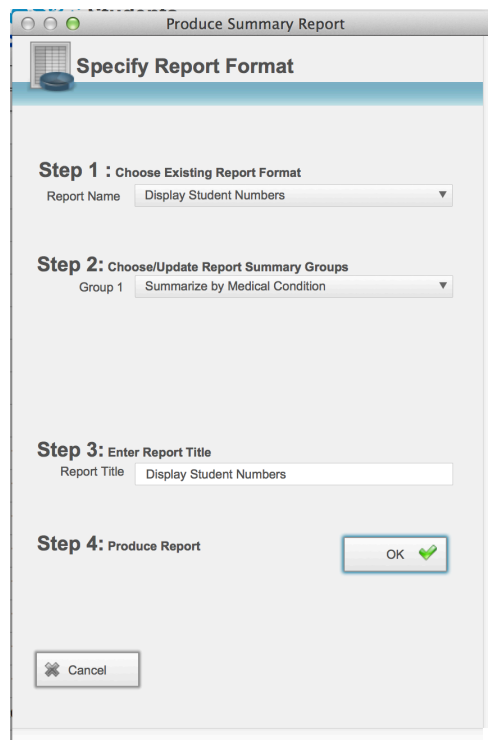
Printing a Chart Showing Students by Medical Condition

This report displays a graphical representation of students by gender. The report will include a summary of all records in the found set.

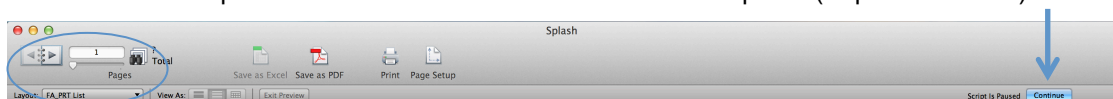
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1). Please an asterisk (*) in the medical condition field if you want to locate all students with a medical condition.
3. Select **Chart Showing ...** from the Print menu and select **Students by Gender** from the pop-out menu displayed.



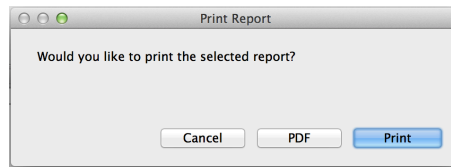
4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Display Student Numbers
Step 2 = Group 1 set to Summarize by Gender
Step 3 = Report Name set to Display Student Numbers
6. Amend the grouping options at step 2 or change the report title.
7. Click the OK button.



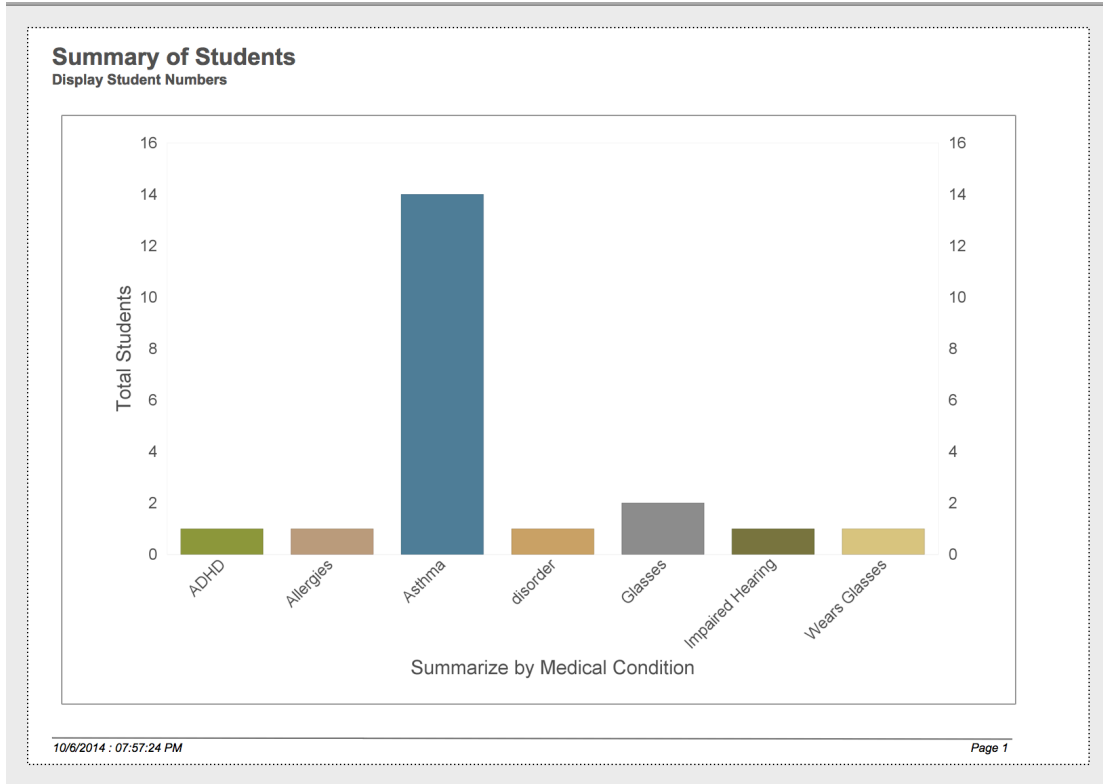
8. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



9. The **Print Report** dialog will be displayed on your screen.



10. Click OK to print the report or Cancel to return to your original screen without printing.

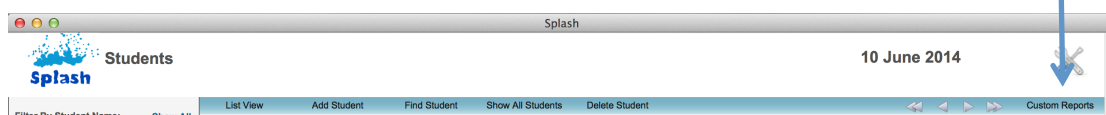


Printing a Custom Report

In addition to the generic student reports, Splash provides custom report writing. Custom reports are specific reports layouts where you can change the grouping for summary totals.

Displaying the Custom Report Dialog

4. Use the **Finding a Student** function to locate the group of students you wish to include in your report.
5. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
6. Click once on the Custom Report button displayed in the blue stripe at the top of your screen.



1. The report writer will be displayed on your screen.

A screenshot of the 'Produce Summary Report' dialog box. The title bar says 'Produce Summary Report'. The dialog has a header 'Specify Report Format' with a printer icon. It contains four steps:
Step 1: Choose Existing Report Format
Report Name: Summary by Gender and Age (dropdown menu)
Step 2: Choose/Update Report Summary Groups
Group 1: Summarize by Gender (dropdown menu)
Group 2: Summarize by Age (dropdown menu)
Group 3: (empty dropdown menu)
Show Detail: ☐
Step 3: Enter Report Title
Report Title: Summary by Gender and Age (text field)
Step 4: Produce Report
OK (button with green checkmark)
Cancel (button with red X)

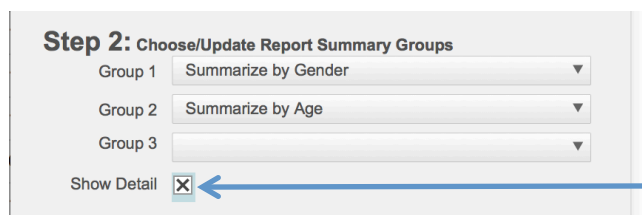
Defining a Custom Report

The custom report dialog is divided into three steps. When you have completed each of the three sections you are ready to generate your report. Create your custom report by completing the steps outlined below:

4. Choose the Report Type
5. Choose the Reporting Groups.
6. Give your report a title.

The three fields displayed at **Step 2** are used to define how the information in your report will be structured. Summary totals will be displayed for each group you have defined at levels one, two and three.

If you wish to include detailed information about each family in your report, click the **Show Detail** button.



Step 2: Choose/Update Report Summary Groups

Group 1 Summarize by Gender

Group 2 Summarize by Age

Group 3

Show Detail ☒

Custom Report Sample (No Detail)

The sample report below demonstrates the use of summary levels. Show Detail was left blank when the report was created.

Summary of Students			
Summary by Gender and Age		Number of Students	Number of Bookings
Female		17	131
1 Years		1	0
2 Years		1	15
3 Years		2	5
4 Years		4	54
7 Years		2	
8 Years		4	39
9 Years		3	18

Custom Report Sample (Show Detail)

Information in the report below has been grouped by the same categories, however this time **Show Detail** has been selected.

Summary of Students			
Summary by Gender and Age		Number of Students	Number of Bookings
Female		17	131
1 Years		1	0
denise taylor	79 Main St, Tawa, Wellington 4010	04 236 9137	0
2 Years		1	15
Sandra Patterson	76 Kent St, Newlands, Wellington 4008	027 2222082	15
3 Years		2	5
Paulette Aplin	76 High St, Tawa, Wellington 4010	04 236 5981	
Susan Aplin	76 High St, Tawa, Wellington 4010	04 236 5981	5

Defining Family Details

One record should exist in this module for every family attending the swim school. It includes a link to any children from the same household. Use this module to monitor family accounts and generate any family correspondence.

Displaying the Family Home Screen

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families** icon



3. The Families data entry screen will be displayed

The Family Record

The family record contains generic information about the family and members of the family. On the right of the screen you will see four tab cards; Bookings, Accounts, Correspondence, and Custom Fields.

NB: Define the default telephone number by clicking the radio button to the right of the telephone number you would like to appear on all booking reports.

NB: Send a SMS directly to the selected family by clicking the SMS icon to the left of the Mobile telephone number.

Family Bookings – The Bookings tab card within the family file displays a list of all bookings made by the family. Each booking line displays the payment status, day, time, class name, and block. Catchups and exits are also displayed in the list, however they are colour coded to represent future catchups, current catchups, past catchups or exited bookings.

Navigate quickly to a selected booking by clicking the magnifier to the left of the required booking.

The screenshot shows the 'Family Bookings' tab in the Splash Families software. The interface is divided into several sections:

- Header:** Displays the date '11 June 2014' and a green dollar sign icon.
- Filter By Family Name:** A dropdown menu set to 'Everyone'.
- Sort By:** A dropdown menu set to 'Family Name'.
- Family List:** A list of families including ANDERSON (David Anderson), APLIN (Sylvia Aplin), APOLLO (Martha Apollo), BEAUCHAMP (Russell), BRADLEY (Patricia Bradley), BROWN (Peter Brown), BROWN (Sam Brown), BUCHANAN (Debbie Buchanan), CRANDLEY (Joanne Crandley), FAIRBROTHER (Mark Fairbrother), HARGREAVES (Susan), HARPER (Edith Harper), HUGHSON (Ngairie Hughson), JESSOP (Tony Jessop), JONES (Barbara Jones), JONES (Barry Jones), JONES (David Jones), KIMBLE (Amanda Kimble), KING (Nathan King), LARSEN (John Larsen), MACPHERSON (Virginia), MCARTHUR (Andrew McArthur), MCDUGAL (Mary McDougal), MORRISON (Celia Morrison), NIGHTINGALE (Barbara), O'DONNELL (Patricia O'Donnell), PATTERSON (Mary Patterson), PATTERSON (Neil Patterson), PEARSON (Jenny Pearson), PULL (Pui Sandra), RIM (Gladys Rim), ROBINSON (Nicola Robinson), SCHWASS (Robyn Schwass), and SINCLAIR (Linley Sinclair).
- Family Details:**
 - Family ID:** 2
 - Name:** Smith
 - Family Members:**
 - Sam Smith (7.7m)
 - Nicholas Smith (7.7m)
 - Jacob Smith (8.7m)
 - Comments:** A text area for comments.
 - Primary Contact:**
 - Name:** Barbara / Smith
 - Relationship:** Mother
 - Address:** 6A Erlestoke Crescent
 - Suburb:** Churton Park
 - City:** Wellington
 - PC:** 4001
 - Email:** barbaras@xtra.co.nz
 - Telephone:**
 - Home: 04 478 4616
 - Work:
 - Mobile: 0272222082
- Bookings:** A table showing a list of bookings with columns for Date, Day, Time, Class Name, and Term/Year. The table includes a 'Total Enrolments (\$5)' section and a 'First Booking' section.

Family Accounts – The Accounts tab card within the family file display a list of all payments made by the family for either bookings or products. Use this screen to review a history of payments or reprint a receipt.

The screenshot shows the 'Family Accounts' tab in the Splash Families software. The interface is divided into several sections:

- Header:** Displays the date '11 June 2014' and a green dollar sign icon.
- Filter By Family Name:** A dropdown menu set to 'Everyone'.
- Sort By:** A dropdown menu set to 'Family Name'.
- Family List:** A list of families including ANDERSON (David Anderson), APLIN (Sylvia Aplin), APOLLO (Martha Apollo), BEAUCHAMP (Russell), BRADLEY (Patricia Bradley), BROWN (Peter Brown), BROWN (Sam Brown), BUCHANAN (Debbie Buchanan), CRANDLEY (Joanne Crandley), FAIRBROTHER (Mark Fairbrother), HARGREAVES (Susan), HARPER (Edith Harper), HUGHSON (Ngairie Hughson), JESSOP (Tony Jessop), JONES (Barbara Jones), JONES (Barry Jones), JONES (David Jones), KIMBLE (Amanda Kimble), KING (Nathan King), LARSEN (John Larsen), MACPHERSON (Virginia), MCARTHUR (Andrew McArthur), MCDUGAL (Mary McDougal), MORRISON (Celia Morrison), NIGHTINGALE (Barbara), O'DONNELL (Patricia O'Donnell), PATTERSON (Mary Patterson), PATTERSON (Neil Patterson), PEARSON (Jenny Pearson), PULL (Pui Sandra), RIM (Gladys Rim), ROBINSON (Nicola Robinson), SCHWASS (Robyn Schwass), and SINCLAIR (Linley Sinclair).
- Family Details:**
 - Family ID:** 2
 - Name:** Smith
 - Family Members:**
 - Sam Smith (7.7m)
 - Nicholas Smith (7.7m)
 - Jacob Smith (8.7m)
 - Comments:** A text area for comments.
 - Primary Contact:**
 - Name:** Barbara / Smith
 - Relationship:** Mother
 - Address:** 6A Erlestoke Crescent
 - Suburb:** Churton Park
 - City:** Wellington
 - PC:** 4001
 - Email:** barbaras@xtra.co.nz
 - Telephone:**
 - Home: 04 478 4616
 - Work:
 - Mobile: 0272222082
- Accounts:** A table showing a list of payments with columns for Date, Inv ID, Description, and Amount. The table includes a 'Total Enrolments (\$5)' section and a 'First Booking' section.

Family Correspondence – The Correspondence tab card within the family file displays a list of all correspondence created for the selected family. To create a new item, simply click the Create Correspondence button.

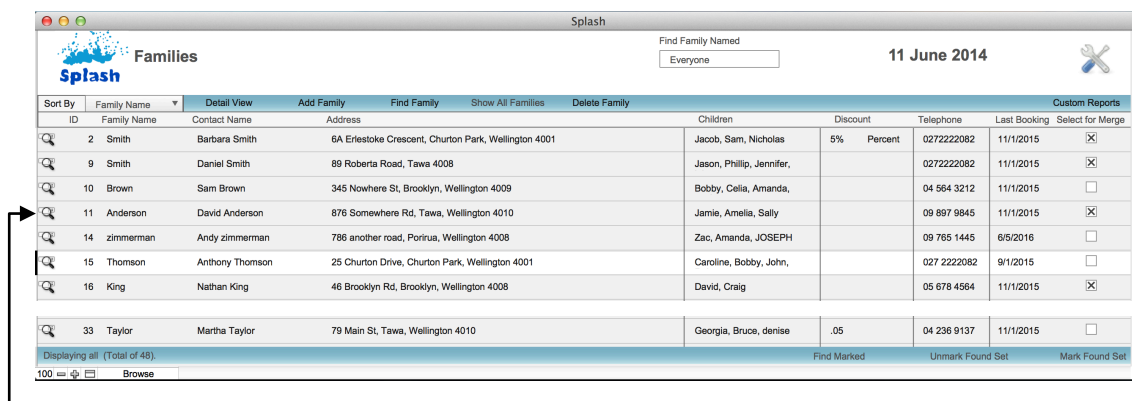
The screenshot shows the 'Families' window in the Splash software. The 'Correspondence' tab is selected, displaying a list of correspondence items for Family ID 2. The list includes items such as 'Happy Birthday' letters and emails, and 'Swim School Account Reminder Notice' emails. A 'Create Correspondence' button is visible at the top right of the list. The left sidebar shows a list of family members, and the top navigation bar includes options like 'List View', 'Add Family', 'Find Family', 'Show All Families', and 'Delete Family'.

Family Custom Fields – The Custom Fields tab card within the family file displays seven additional fields for storing information about the family. Five text fields and two date fields have been created for custom use. Define the labels for your custom fields in the Preferences area of the database.

The screenshot shows the 'Families' window in the Splash software, with the 'Custom Fields' tab selected. This tab displays seven custom fields for storing information about the family: Custom One, Custom 2, Custom 3, Custom 4, Custom 5, Custom Date 1, and Custom Date 2. The left sidebar and top navigation bar are identical to the previous screenshot, showing the same family members and software interface elements.

Listing Family Records

Each record in your database can be displayed in either the entry screen or list view. List view will display all records in the found set – see the bottom left corner of the screen for the size of the current found set.



Sort By	Family Name	Detail View	Add Family	Find Family	Show All Families	Delete Family	Custom Reports			
ID	Family Name	Contact Name	Address	Children	Discount	Telephone	Last Booking	Select for Merge		
2	Smith	Barbara Smith	6A Eriestoke Crescent, Churton Park, Wellington 4001	Jacob, Sam, Nicholas	5% Percent	0272222082	11/1/2015	<input checked="" type="checkbox"/>		
9	Smith	Daniel Smith	89 Roberta Road, Tawa 4008	Jason, Phillip, Jennifer,		0272222082	11/1/2015	<input checked="" type="checkbox"/>		
10	Brown	Sam Brown	345 Nowhere St, Brooklyn, Wellington 4009	Bobby, Celia, Amanda,		04 564 3212	11/1/2015	<input type="checkbox"/>		
11	Anderson	David Anderson	876 Somewhere Rd, Tawa, Wellington 4010	Jamie, Amelia, Sally		09 897 9845	11/1/2015	<input checked="" type="checkbox"/>		
14	zimmerman	Andy zimmerman	786 another road, Porirua, Wellington 4008	Zac, Amanda, JOSEPH		09 765 1445	6/5/2016	<input type="checkbox"/>		
15	Thomson	Anthony Thomson	25 Churton Drive, Churton Park, Wellington 4001	Caroline, Bobby, John,		027 2222082	9/1/2015	<input type="checkbox"/>		
16	King	Nathan King	46 Brooklyn Rd, Brooklyn, Wellington 4008	David, Craig		05 678 4564	11/1/2015	<input checked="" type="checkbox"/>		
33	Taylor	Martha Taylor	79 Main St, Tawa, Wellington 4010	Georgia, Bruce, denise	.05	04 236 9137	11/1/2015	<input type="checkbox"/>		

Displaying all (Total of 48)

100 Browse

Find Marked Unmark Found Set Mark Found Set

NB: Click magnifier to the left of the Family Name to display the data entry screen.

Displaying a List of Families (from Family Details)

1. Click once the **List View** button displayed in the blue stripe at the top of your screen.



2. The Families List View screen will be displayed

Displaying a List of Families (from outside Family screen)

7. Click once on the **Splash** icon on the top left corner of your screen.
8. Select the **Families List** icon



9. The Families List View screen will be displayed

Entering a New Family

A new family record must be created whenever a new family joins the school. A student cannot be booked in to a session unless the family has been registered within Splash.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families** icon



3. The Families data entry screen will be displayed



2. Click once on the **Add Family** button displayed in the blue stripe at the top of your screen.
3. The **Add New Family** dialog will be displayed.


A screenshot of the 'Add New Family' dialog box. The window title is 'Add New Family'. The dialog has a header 'Enter New Family Details' with a family icon. It contains several input fields: 'Family Name' (with 'Rim' entered), 'Primary Contact' (with 'Gladys' entered), 'Relationship' (with 'Mother' selected), 'Address' (with '322 New Horizon Blvd' entered), 'Suburb' (with 'Johnsonville' entered), 'City' (with 'Wellington' entered), 'PC' (with '4008' entered), 'Email' (with 'gladys.rim@rim.org' entered), and 'Telephone' (with '478 5674' entered). There are also checkboxes for 'Home', 'Work', and 'Mobile' (with 'Mobile' selected). At the bottom, there are fields for 'Referred From', 'Referral Family (if applicable)', 'Discount Rate', 'Type', 'Payment by Direct Debit' (with 'No' selected), and 'Alert Message'. There are 'Cancel' and 'Done' buttons at the bottom.

4. Complete as many details as possible within the dialog and click the **Done** button to save the details and return to the family entry screen.
5. Continue below to add family members

Adding a Student to the Family

6. Ensure the correct family record is displayed on your screen.
7. Click the **Add Student** button to display the Add New Student dialog.
8. Complete as many details as possible within the dialog and click the **Done** button to save the student details and return to the family entry screen.
9. Repeat steps 6 & 7 above until all family members have been added.

Add New Student



Enter New Student Details

Name

George / Rim

First NameLast Name

Personal Details

Date of Birth6/2/2008Age6

Gender☐ Female☒ Male

MedicalGlasses

Comments

Discount RateType

Rollover BookingsYes

Preferred Client

Family Details

Family NameRim

ContactGladys Rim

Address322 New Horizon Blvd,
Johnsonville,
Wellington 4008

Telephone027 543 2287

Emailgladys.rim@rim.org

Cancel

Done

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User Documentation – Splash V6.0

Finding a Family

13. Click once on the **Splash** icon on the top left corner of your screen.

14. Select the **Families Find** icon



15. The **Search for a Family** dialog box will be displayed on your screen.

16. Enter the criteria for your find by typing your request in the corresponding field/s.

17. Click the **Find Now** button.

18. If one record is located the record will be displayed on the Family entry screen. If multiple records are located the found set will be displayed in the list view.

NB: See *Advanced Find Techniques* within this guide for assistance with Constraining or Extending the found set.

Updating Family Details

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. When the correct family screen is displayed simply overwrite any of the information to update the information that has been stored.

Exiting a Family

When all members of a family have withdrawn from lessons it is important you record the reason why there will be no further bookings. Information entered for exited families can be monitored in exit summary reports.

1. Use the **Finding a Family** function to locate the family record you wish to exit.
2. When the correct family screen is displayed update the **Reason for Exit** field and enter the **Exit Date**.

The screenshot shows the 'Families' module in the Splash software. On the left is a list of families. The main area displays the details for the 'Smith' family (Family ID 2). The 'Family Members' section lists Sam Smith, Nicholas Smith, and Jacob Smith. The 'Primary Contact' section shows Barbara Smith. The right-hand panel has tabs for 'Bookings', 'Accounts', 'Correspondence', and 'Custom Fields'. The 'Bookings' tab is active, showing a list of enrolments. At the bottom right, the 'Exit Reason' dropdown menu is open, showing options: Financial, Goals Met, Other, Other Commitments, Poor Service, and Reluctance.

NB: Exit information may also be entered in the comments tab card in the centre of the family record screen

This screenshot shows the 'Comments' tab in the family record screen. It contains fields for 'Referred From' (set to School), 'Exit Reason' (set to Goals Met), and 'Exit Date' (set to 27/9/2014). There is also an 'Alert Message' field and a 'Preferred Client' checkbox (checked).

Sending a SMS Message

SMS messages can be sent to individual recipients or all recipients in the found set. This command outlines the process for sending an SMS message to the current family. This command will only be successful if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

7. Use the **Finding a Family** function to locate the family record you wish to update.
8. When the correct family screen is displayed simply click the SMS button displayed to the left of the Mobile telephone number.



					Term/Year
10/02/14	Mon	2:00 PM	Dolphins		1 2014
6/02/14	Thu	10:30 AM	Seals		1 2014
10/02/14	Mon	9:30 AM	Dolphins		1 2014
4/02/14	Tue	10:30 AM	Seals		2014
6/05/14	Tue	9:30 AM	Dolphins		2 2014
4/05/14	Sun	2:00 PM	Dolphins		2 2014
6/05/14	Tue	10:30 AM	Seals		2 2014
4/05/14	Sun	9:30 AM	Seals		2 2014
9/02/11	Wed	9:30 AM	Dolphins		1 2011
7/02/11	Mon	2:00 PM	Dolphins		1 2011
9/02/11	Wed	10:30 AM	Seals		1 2011
7/02/11	Mon	9:30 AM	Seals		1 2011
27/04/11	Wed	9:30 AM	Dolphins		2 2011
2/05/11	Mon	2:00 PM	Dolphins		2 2011
27/04/11	Wed	10:30 AM	Seals		2 2011
2/05/11	Mon	9:30 AM	Seals		2 2011
8/02/12	Wed	9:30 AM	Dolphins		1 2012
13/02/12	Mon	2:00 PM	Dolphins		1 2012
8/02/12	Wed	10:30 AM	Seals		1 2012
13/02/12	Mon	9:30 AM	Seals		1 2012
2/05/12	Wed	9:30 AM	Dolphins		2 2012

9. The **Enter New SMS** dialog will be displayed on your screen.

10. Enter the message you wish to send.

11. Click the **Done** button to send your message and return to the family entry screen.

NB: Each SMS message is sent via your email application as per the sample below.

Processing a Payment

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. Click once on the **Dollar Symbol** displayed on the top right of the screen.

The screenshot shows the 'Families' window in the Splash software. The top bar displays '11 June 2014' and a dollar symbol icon circled in red. The left sidebar lists various families. The main area shows details for Family ID 2, including family members (Sam Smith, Nicholas Smith, Jacob Smith) and contact information for Barbara Smith. The right-hand panel displays a table of bookings and accounts, with a 'Total Enrolments (65)' summary.

3. The POS Sales Entry screen will be displayed. The selected family details will be entered with all outstanding bookings displayed on the right of the screen.

The screenshot shows the 'POS' (Point of Sale) window. The top bar displays 'Date: 16/10/2014' and 'Time: 11:57:24 AM'. The left sidebar shows a grid of product categories and a list of items. The main area features a numeric keypad and buttons for 'DIARY', 'List', and 'EoS'. The right-hand panel displays the family's balance and outstanding bookings, including items like 'Jacob Smith Seals - 10:30 AM Thu (Term 1 2014)' and 'Lucas Smith Dolphins - 2:00 PM Sun (Term 2 2014)'.

4. Select the booking/s you would like to pay for by clicking once on each booking on the right of the screen.

Splash POS

Invoice # 146957
POS # 2842
Date 16/10/2014
Time 11:57:24 AM
Barbara Smith
Family ID 2

SMITH (Barbara Smith)

With Balance Zero Balance

Jacob Smith
Seals - 10:30 AM Tue (Term 2 2014) \$81.00
Sam Smith
Seals - 1:00 PM Wed (Term 3 2014) \$72.00
Jacob Smith
Seals - 9:00 AM Mon (Term 1A 2014) \$70.00
Lucas Smith
Dolphins - 9:00 AM Sun (Term 3 2014) \$108.00
Lucas Smith
Dolphins - 9:30 AM Sun (Term 3 2014) \$108.00

1 Sam Smith - Seals - 1:00 PM Wed (Term 3 2014) \$72.00 ea. \$72.00
1 Jacob Smith - Seals - 10:30 AM Thu (Term 1 2014) \$100.00
1 Lucas Smith - Dolphins - 2:00 PM Sun (Term 2 2014) \$81.00
2 Jacob Smith - Seals - 9:30 AM Sun (Term 2 2014) \$81.00

User: cashkeeper Member: Barbara Smith

\$334.00

7 8 9 NEXT
4 5 6 END
Set Qty 1 2 3
- 0 . Clr HOLD

DIARY List EoS

- When all the bookings you wish to process are displayed in the centre of the screen, click the END button (if paying by Cash or Eftpos) or click NEXT to specify alternative payment methods.
- If NEXT is clicked the End Sale screen will be displayed.

Splash POS

Invoice # 146957
POS # 2842
Date 16/10/2014
Time 11:57:24 AM
Barbara Smith

1 Jacob Smith - Seals - 10:30 AM Thu (Term 1 2014) \$100.00
1 Lucas Smith - Dolphins - 2:00 PM Sun (Term 2 2014) \$81.00
1 Jacob Smith - Seals - 9:30 AM Sun (Term 2 2014) \$81.00
1 Sam Smith - Seals - 1:00 PM Wed (Term 3 2014) \$72.00

Payment Method Amount
DEL CreditCard 2842 334
DEL
Total TGC \$334.00
Change CHA \$0.00

CASH EFTPOS CREDIT CARD
GIFT VOUCHER CHEQUE AMEX
INTERNET MANAGEMENT PROMO
DIRECT DEBIT SESSION PASS JOURNAL

Total : \$334.00

\$5 7 8 9 BACK
\$10 4 5 6 END
\$20 1 2 3
\$50 0 . Clr

DIARY List EoS

- Choose the required method of payment – edit the value of the payment and select and select additional payment types for the same sale if required.
- Click the END button to complete the sale.
- Click the DIARY button to exit the Sale Entry screen.

NB: To amend the content of the sale, click the BACK button to return to the Sale Entry screen.

Viewing a History of Payments

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. Click once on the **Accounts** tab card displayed on the right of the screen.

The screenshot shows the Splash Families software interface. On the left is a list of families. The main area displays details for Family ID 2, including family members (Sam Smith, Nicholas Smith, Jacob Smith) and contact information for Barbara Smith. On the right, the 'Accounts' tab is active, showing a list of payments. A magnifying glass icon is visible next to the first payment entry.

Date	Inv ID	Description	Amt
3/05/14	146915	Vorgee Jnr \$21	\$21.00
3/05/14	146915	Sam Smith - Dolphins - 9:30 AM Wed (Term 4 2014)	\$76.50
3/05/14	146915	Lucas Smith - Dolphins - 2:00 PM Sun (Term 4 2014)	\$81.00
3/05/14	146915	Missile Goggles \$30	\$29.00
2/05/14	146899	Nicholas Smith - Dolphins - 9:30 AM Sun (Term 3 2014)	-\$9.00
2/05/14	146899	Sam Smith - Dolphins - 9:30 AM Wed (Term 4 2014)	\$76.50
2/05/14	146899	Boys Bathers	\$0.00
2/05/14	146899	Missile Goggles \$30	\$30.00
29/04/14	146855	Sam Smith - Dolphins - 9:30 AM Tue (Term 4 2014)	-\$15.00
29/04/14	146855	Lucas Smith - Dolphins - 2:00 PM Sun (Term 3 2014)	\$108.00
29/04/14	146863	Missile Goggles \$30	\$30.00
29/04/14	146863	Sam Smith - Dolphins - 9:30 AM Wed (Term 3 2014)	-\$30.00
29/04/14	146863	Nicholas Smith - Seals - 1:00 PM Wed (Term 3 2014)	\$108.00
29/04/14	146863	Nicholas Smith - Seals - 1:00 PM Wed (Term 4 2014)	\$81.00
28/04/14	146833	Sam Smith - Dolphins - 9:30 AM Wed (Term 3 2014)	\$102.00

Viewing or Reprinting a Receipt

6. Use the **Finding a Family** function to locate the family record you wish to update.
7. Click once on the **Accounts** tab card displayed on the right of the screen.
8. Click once on the **magnifier** displayed to the left of the required payment.

3/05/14	146915	Sam Smith - Dolphins - 9:30 AM Wed (Term 4 2014)	\$76.50
3/05/14	146915	Lucas Smith - Dolphins - 2:00 PM Sun (Term 4 2014)	\$81.00

9. A copy of the receipt will be displayed on your screen.

The screenshot shows a receipt titled 'Invoice 146915'. It includes the school's name, address, and contact information. The receipt lists the following items:

Description	Qty	Unit \$	Total
Vorgee Jnr \$21	1	\$21.00	\$21.00
Sam Smith - Dolphins - 9:30 AM Wed (Term 4 2014)	1	\$76.50	\$76.50
Lucas Smith - Dolphins - 2:00 PM Sun (Term 4 2014)	1	\$81.00	\$81.00
Missile Goggles \$30	1	\$29.00	\$30.00
Total Inc GST			\$207.50
GST Amt			\$6.52
Payment Method			\$188.50

The receipt also shows the payment method as 'Eftpos' and includes buttons for 'Close' and 'Print'.

10. Click the **Print** button to reprint the receipt or click **Close** to return to the family screen without printing the receipt.

Generating Family Documents

The Correspondence tab card within the family file displays a list of all correspondence created for the selected family (with the exception of broadcast email or SMS messages).

Document records can be created as letters, emails, SMS messages, or file notes.

9. Use the **Finding a Family** function to locate the family record you wish to update.

10. Click once on the **Correspondence** tab card displayed on the right of the screen.

The screenshot shows the 'Families' window in the Splash software. On the left is a list of families under 'Filter By Family Name:'. The main area shows details for the 'Smith' family, including family members (Sam, Nicholas, and Jacob Smith) and contact information for Barbara Smith. On the right, the 'Correspondence' tab is selected, displaying a list of correspondence items with columns for date, type, and name.

11. Click once on the **Add Correspondence** button to display the **Create Document** dialog box.

Create Correspondence

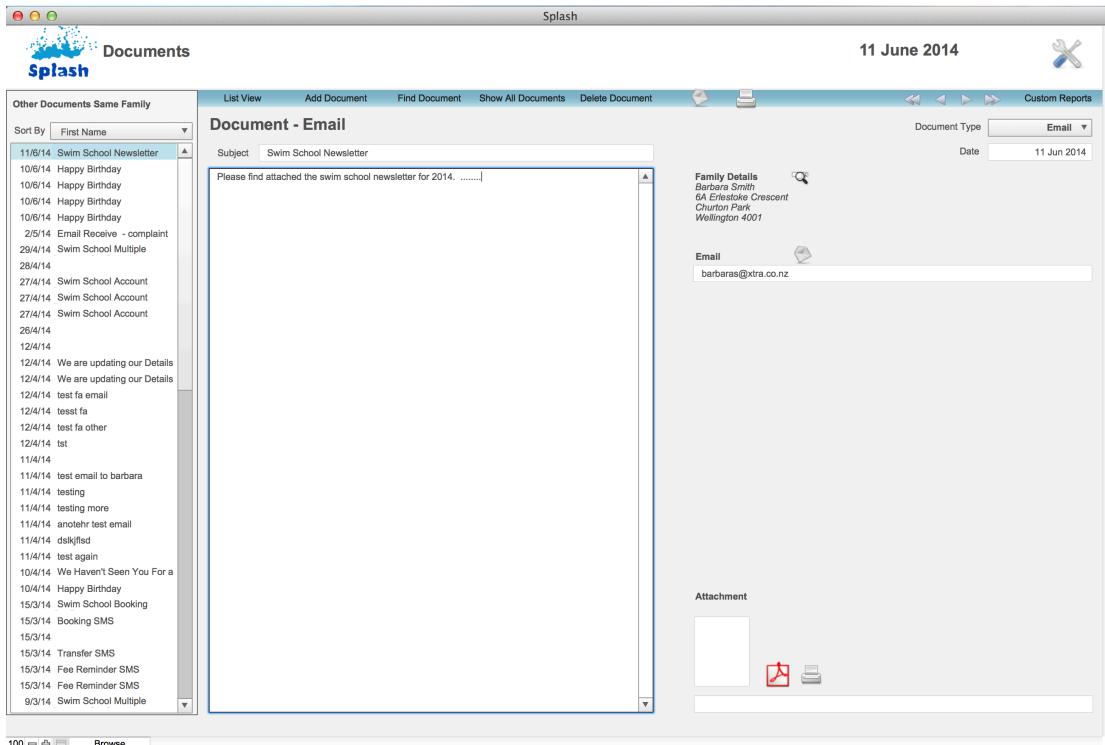
12. Choose the type of document you want to create and click the **Done** button.

The 'Create Document' dialog box has a title bar and a pencil icon. It says 'Create New Document' and 'Please select the type of document you would like to create'. A dropdown menu shows 'Email'. At the bottom are 'Cancel' and 'Done' buttons.

13. The **Create Document** dialog box will be displayed on your screen. Select the document you wish to use or click Use Blank Document and click **Done**.

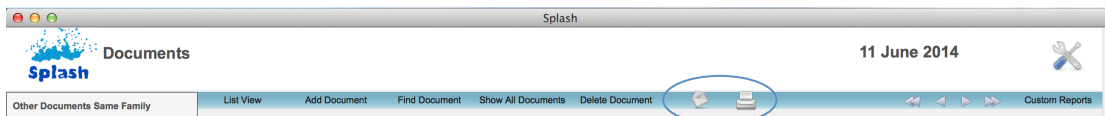
This 'Create Document' dialog box is similar to the previous one but prompts the user to 'Please select the template you would like to use, leave blank to begin with an empty document'. The dropdown menu shows '<Blank Template>'. It also has 'Cancel' and 'Done' buttons.

14. The selected document will be displayed on your screen.



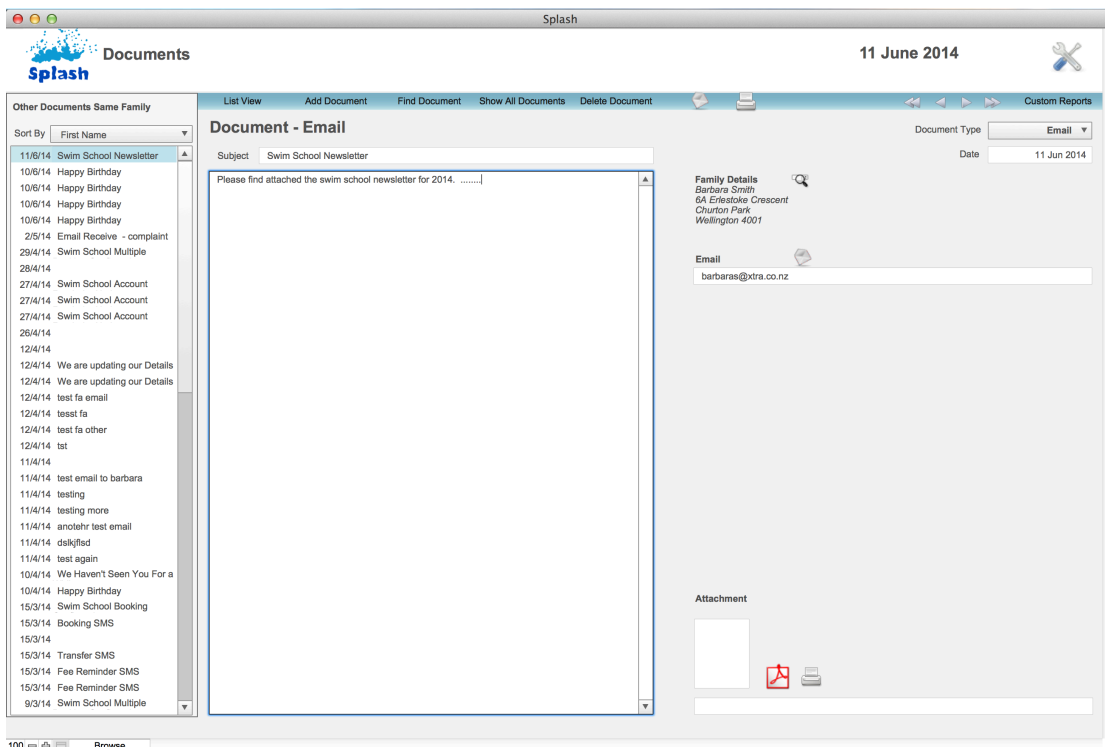
15. Edit the document as necessary.

16. Click the **Print** or **Email** button.



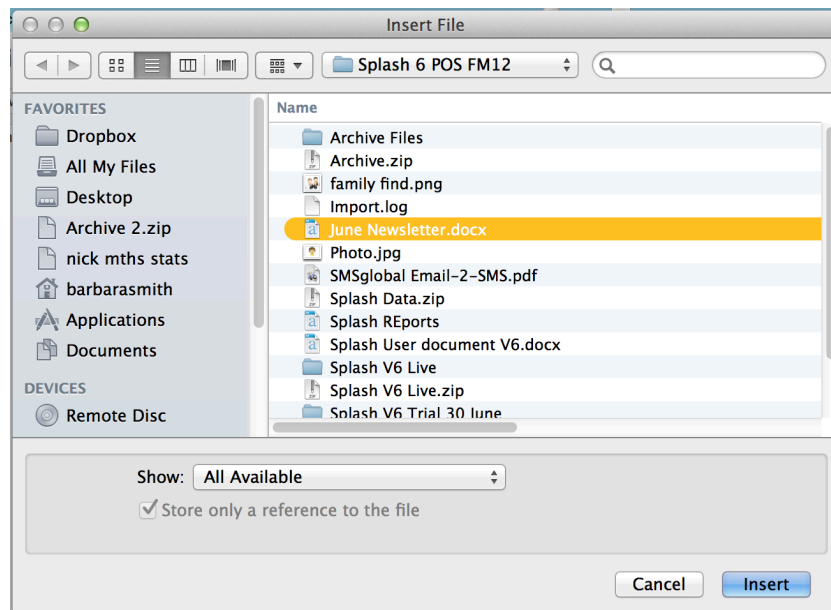
Adding an Attachment to an Email

When an email is created you have the option of including an attachment with your message. Although the attachment icon is displayed as a pdf symbol any document type can be included.

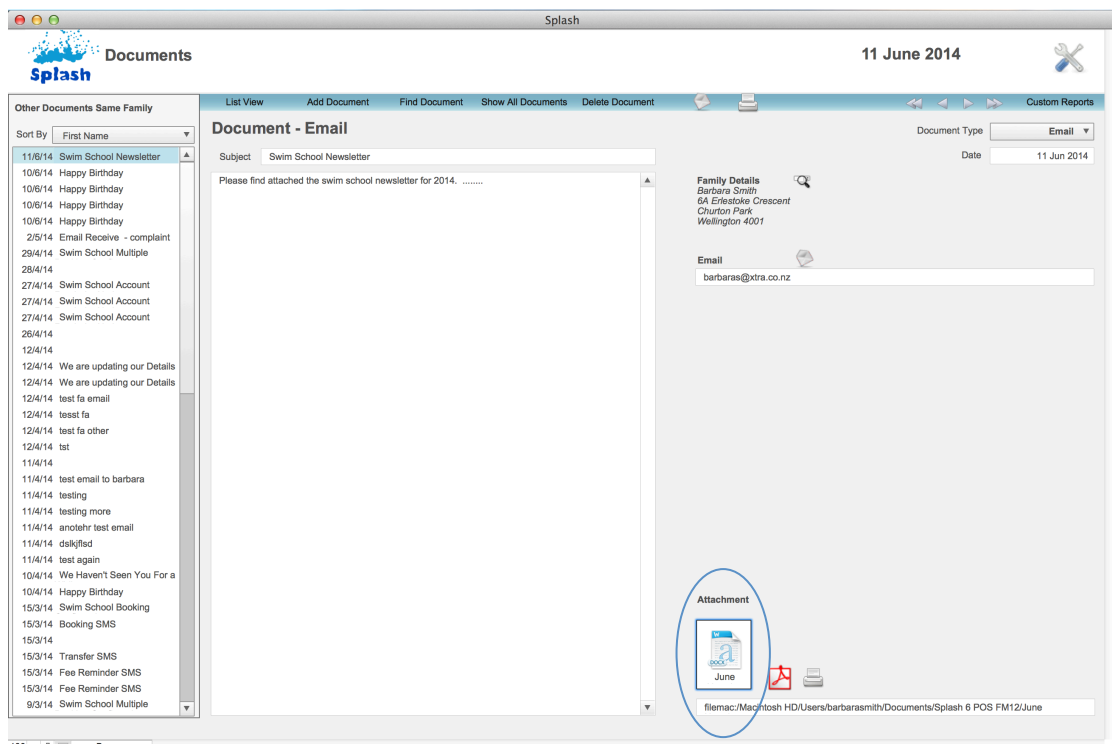


NB: The Attachment field and buttons are only on the screen for email document types.

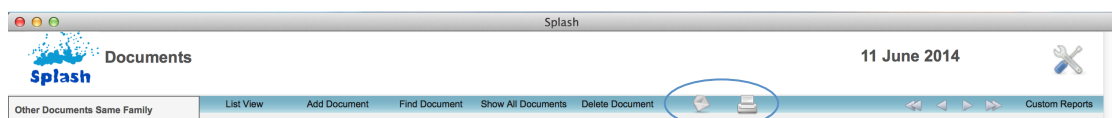
6. Ensure the correct email document is displayed on your screen.
7. Click once on the **Insert PDF** button.
8. The Insert File dialog will be displayed on your screen. Locate the file you wish to attach and click the Insert button.



9. The inserted document will appear in the Attachment field on the selected record.



10. Click the **Print** or **Email** button.



Creating a Family Statement

A family statement contains a list of bookings for the selected family. The list can be filtered to show a selection of bookings or can include all bookings ever recorded for the family. The subsequent report can be printed or automatically emailed to the selected family.

1. Use the **Finding a Family** function to locate the family record you wish to produce.
2. When the correct family screen is displayed simply click the **Print Statement of Activity** button below the list of bookings.

The screenshot shows the 'Families' module in the Splash software. The top navigation bar includes 'List View', 'Add Family', 'Find Family', 'Show All Families', and 'Delete Family'. The date '11 June 2014' and a dollar sign icon are also visible. The left sidebar lists various families, including Anderson, Aplin, Apollo, Beauchamp, Bradley, Brown, Buchanan, Crandley, Fairbrother, Hargreaves, Harper, Hughson, Jessop, Jones, Kimble, King, Larsen, Macpherson, McArthur, McDougall, Morrison, Nightingale, O'Donnell, Patterson, Pearson, Pull, Rim, Robinson, Schwass, and Sinclair. The main area displays details for Family ID 2, including family members (Sam Smith, Nicholas Smith, Jacob Smith), comments, and contact information (Barbara Smith, Mother, 8A Erlestoke Crescent, Churton Park, Wellington, PC 4001). A list of bookings is shown on the right, with columns for date, time, location, and term/year. The bottom section includes a 'Primary Contact' tab, a 'Print Statement of Activity' button, and an 'Exit Reason' dropdown.

3. The **Specify Records for Reporting** dialog will be displayed on your screen.
4. Select one of the following;

Balance – to include bookings with an outstanding balance
Some – to include bookings within a specified date range
All – to include all bookings ever made for related family members

The dialog box titled 'Specify Records for Reporting' contains the text: 'Would you like to include ALL booking records or SOME bookings records or only bookings with a BALANCE in the activity report'. Below the text are three buttons: 'Balance', 'Some', and 'All'. The 'All' button is highlighted in blue.

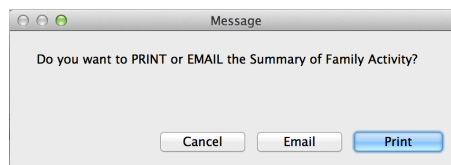
5. The report will be previewed on your screen.

Bookings - Current Balance of Booking					Cost	Paid	Balance
Balance as at 11/6/2014					(Less Discount/Credits)		
Smith (Barbara Smith)					0272222082	\$1,694.50	\$0.00
Jacob Smith	Seals	Mon	BS	Term: 1A 2014	\$70.00	\$0.00	\$70.00
Lucas Smith	Dolphins	Sun	BS	Term: 3 2014	\$108.00	\$0.00	\$108.00
Lucas Smith	Dolphins	Sun	BS	Term: 3 2014	\$108.00	\$0.00	\$108.00
Lucas Smith	Dolphins	Sun	BT	Term: 4 2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 4 2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BS	Term: 4 2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 4 2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 1 2015	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 1 2015	\$81.00	\$0.00	\$81.00
Nicholas Smith	Seals	Wed	BS	Term: 1 2015	\$81.00	\$0.00	\$81.00
Nicholas Smith	Seals	Wed	BS	Term: 1 2015	\$81.00	\$0.00	\$81.00
Sam Smith	Seals	Wed	BT	Term: 3 2014	\$72.00	\$0.00	\$72.00
Sam Smith	Seals	Wed	BS	Term: 4 2014	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 4 2014	\$76.50	\$0.00	\$76.50
Sam Smith	Seals	Wed	BS	Term: 4 2014	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 4 2014	\$76.50	\$0.00	\$76.50
Sam Smith	Seals	Wed	BS	Term: 4 2014	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Tue	BS	Term: 1 2015	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 1 2015	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 1 2015	\$76.50	\$0.00	\$76.50
Sam Smith	Seals	Wed	BS	Term: 1 2015	\$76.50	\$0.00	\$76.50

11/6/2014 : 09:10:52 AM

Page 1

- Press **Enter** or click the continue button to progress to the print or email options.
- Select whether you wish to **Email** or **Print** the selected report (or choose Cancel to return to the family file without printing or emailing).



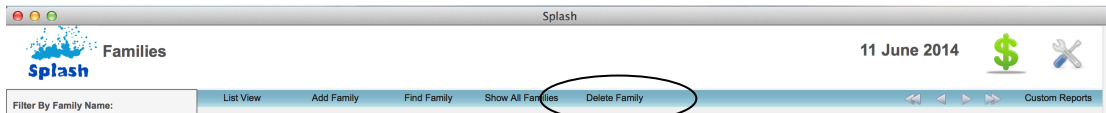
NB: If Email is selected the email will be displayed with the document attached.



Deleting a Family Record

As a rule a record should only be deleted if it was made in error. To ensure data integrity a family record can only be deleted if there are no bookings or payments attached. Family records can be deleted from either the Family entry screen or the list view.

7. Use the **Finding a Family** function to locate the family record you wish to exit.
8. When you can see the correct family record on your screen.



11. Click once on the **Delete Family** button.
12. A dialog will be displayed asking you to confirm the family record should be deleted.



13. Click **OK** to delete the record or **Cancel** to return to the family screen without making a change.

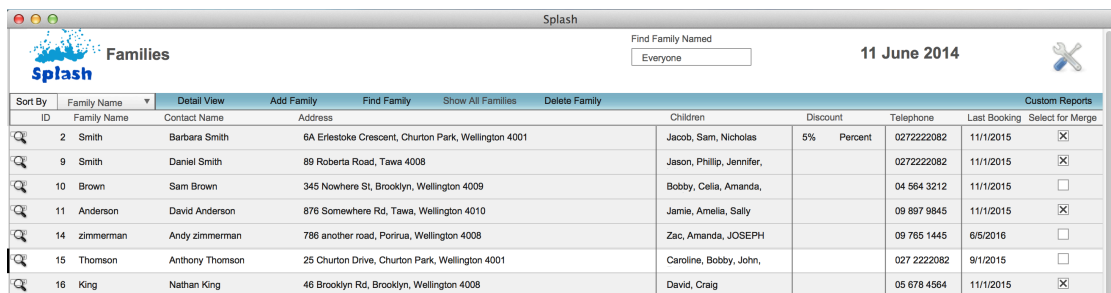
Sending a Broadcast SMS Message

A broadcast SMS is a single message sent to multiple recipients. A SMS message sent in this way will not be recorded on the family file.

Group SMS messages are sent to all recipients in the found set that have a valid mobile telephone number stored on file.

This function will only be successful if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

8. Use the **Finding a Family** function to locate the group of records you wish to send a message to. Locate only families with a mobile telephone number by placing an asterisk (*) in the mobile field along with any other find criteria.
9. The found set of records will be displayed in a list on your screen (if the list is incorrect repeat step 1).



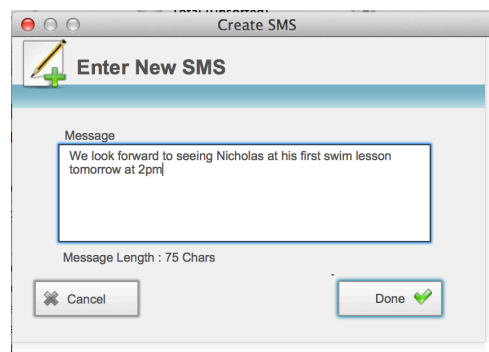
ID	Family Name	Contact Name	Address	Children	Discount	Telephone	Last Booking	Select for Merge
2	Smith	Barbara Smith	6A Eriestoke Crescent, Churton Park, Wellington 4001	Jacob, Sam, Nicholas	5% Percent	0272222082	11/1/2015	<input checked="" type="checkbox"/>
9	Smith	Daniel Smith	89 Roberta Road, Tawa 4008	Jason, Phillip, Jennifer,		0272222082	11/1/2015	<input checked="" type="checkbox"/>
10	Brown	Sam Brown	345 Nowhere St, Brooklyn, Wellington 4009	Bobby, Celia, Amanda,		04 564 3212	11/1/2015	<input type="checkbox"/>
11	Anderson	David Anderson	878 Somewhere Rd, Tawa, Wellington 4010	Jamie, Amelia, Sally		09 897 9845	11/1/2015	<input checked="" type="checkbox"/>
14	zimmerman	Andy zimmerman	786 another road, Porirua, Wellington 4008	Zac, Amanda, JOSEPH		09 765 1445	6/5/2016	<input type="checkbox"/>
15	Thomson	Anthony Thomson	25 Churton Drive, Churton Park, Wellington 4001	Caroline, Bobby, John,		027 2222082	9/1/2015	<input type="checkbox"/>
16	King	Nathan King	46 Brooklyn Rd, Brooklyn, Wellington 4008	David, Craig		05 678 4564	11/1/2015	<input checked="" type="checkbox"/>

10. Select the **Scripts** menu... choose **Send SMS...** choose **Send SMS to Family [Found Set]**.

11. A dialog will be displayed on your screen warning that you are about to send multiple SMS messages. Click **OK** to continue or Cancel or exit the script.



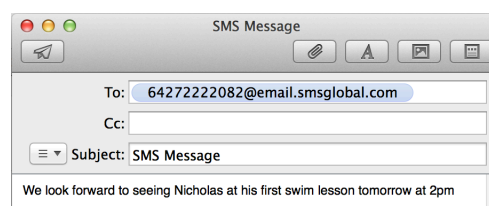
12. The **Enter New SMS** dialog will be displayed on your screen.



13. Enter the message you wish to send.

14. Click the **Done** button to send your message and return to the family entry screen.

NB: Each SMS message is sent via your email application as per the sample below.

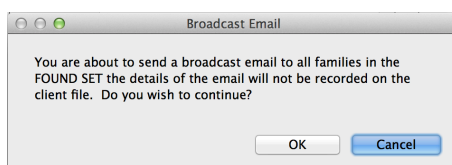


Sending a Broadcast Email

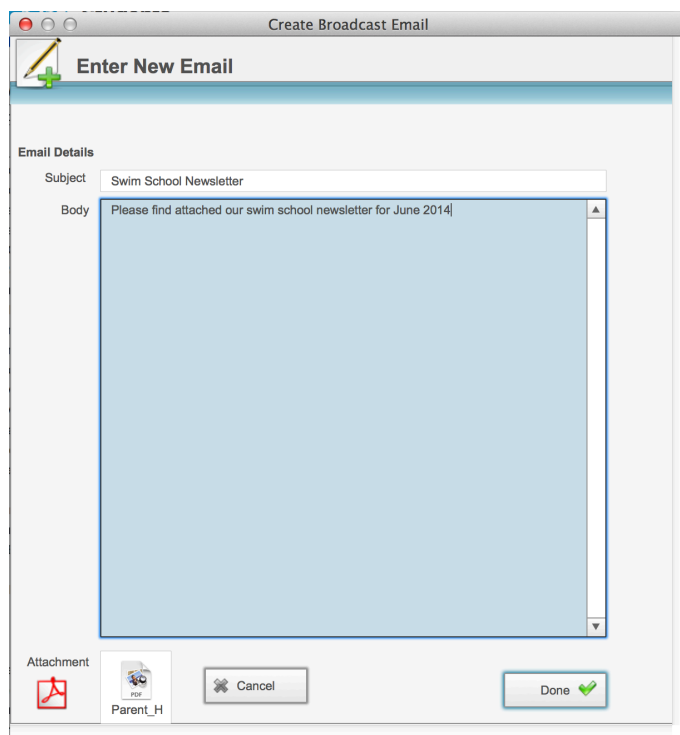
A broadcast email is a single email sent to multiple recipients. An email sent in this way will not be recorded on the family file.

Group email messages are sent to all recipients in the found set that have a valid email address stored on file.

8. Use the **Finding a Family** function to locate the group of records you wish to send a message to. Locate only families with an email address by placing an asterisk (*) in the email field along with any other find criteria.
9. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
10. Select **Send Broadcast Email** from the **Scripts** Menu.



11. A dialog will be displayed on your screen warning that you are about to send multiple email messages. Click **OK** to continue or Cancel or exit the script.
12. The **Enter Broadcast Email** dialog will be displayed on your screen.



13. Enter the message you wish to sent and attach a document if required.
14. Click the **Send** button.

NB: To ensure the privacy of all clients the email address will automatically be placed in the BCC box. You can view the messages that have been sent if you look within the Sent Items folder of your email application.

Generating a Family Mail Merge

The mail merge function within Splash operates using a marked record system. All marked records will be included in the mail merge. Marked families appear in the Family listing with a cross in the box on the far right of the screen.

Splash

Families

Find Family Named

Everyone

11 June 2014

Sort By	Family Name	Detail View	Add Family	Find Family	Show All Families	Delete Family	Custom Reports			
ID	Family Name	Contact Name	Address	Children	Discount	Telephone	Last Booking	Select for Merge		
	2	Smith	Barbara Smith	6A Erlestoke Crescent, Churton Park, Wellington 4001	Jacob, Sam, Nicholas	5%	0272222062	11/1/2015		
	9	Smith	Daniel Smith	89 Roberta Road, Tawa 4008	Jason, Phillip, Jennifer,		0272222082	11/1/2015	<input checked="" type="checkbox"/>	
	10	Brown	Sam Brown	345 Nowhere St, Brooklyn, Wellington 4009	Bobby, Celia, Amanda,		04 564 3212	11/1/2015	<input type="checkbox"/>	
	11	Anderson	David Anderson	878 Somewhere Rd, Tawa, Wellington 4010	Jamie, Amelia, Sally		09 897 9845	11/1/2015	<input checked="" type="checkbox"/>	
	14	zimmerman	Andy zimmerman	786 another road, Porirua, Wellington 4008	Zac, Amanda, JOSEPH		09 765 1445	6/5/2016	<input type="checkbox"/>	
	15	Thomson	Anthony Thomson	25 Churton Drive, Churton Park, Wellington 4001	Caroline, Bobby, John,		027 2222082	9/1/2015	<input type="checkbox"/>	
	16	King	Nathan King	46 Brooklyn Rd, Brooklyn, Wellington 4008	David, Craig		05 678 4564	11/1/2015	<input checked="" type="checkbox"/>	
	17	White	Julie White	76 Moorefield Road, Johnsonville, Wellington 4001	Jane		04 675 1432	28/5/2014	<input type="checkbox"/>	

Creating a mail merge is a two step process; the first step involves identifying the families you wish to receive the merge document, the second step involved writing the document you wish to send.

18. Click once on the **Splash** icon on the top left corner of your screen.

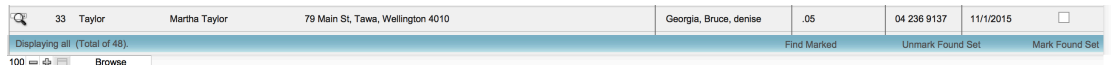
19. Select the **Families List** icon



20. The Families List View screen will be displayed.

21. Click once on the **Find Marked** button displayed at the bottom right of the screen. This command will display a list of all families that are currently marked.

22. Click once on the **Unmarked Found Set** button. This will clear all settings for previously marked records.



33	Taylor	Martha Taylor	79 Main St, Tawa, Wellington 4010	Georgia, Bruce, denise	.05	04 236 9137	11/1/2015	<input type="checkbox"/>
Displaying all (Total of 48)								
					Find Marked	Unmark Found Set	Mark Found Set	

23. Use the **Finding a Family** function to locate the group of records you wish to send a message to.

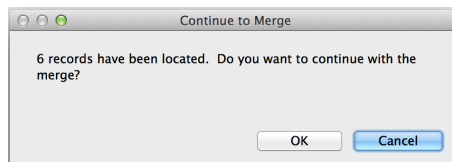
24. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 4)

25. Click once on the **Mark Found Set** button to select the records for the mail merge. A cross should appear for each family in the Mark column on the right of the screen.

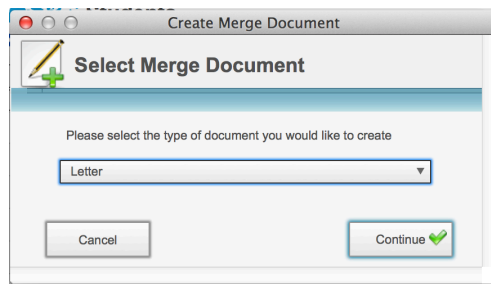
26. Repeat steps 4 to 6 above until all required families have been marked.

27. Select **Perform Mail Merge** from the Scripts menu.

28. A dialog will be displayed advising the number of records which have been selected for the mail merge. Click OK if this number is correct, or click Cancel to exit the script and begin again at step 1.



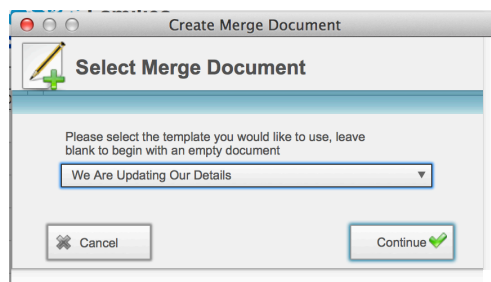
29. The **Create Merge Document** dialog will be displayed asking you to define the type of document you wish to create. Select the required type of document from the drop-down menu provided.



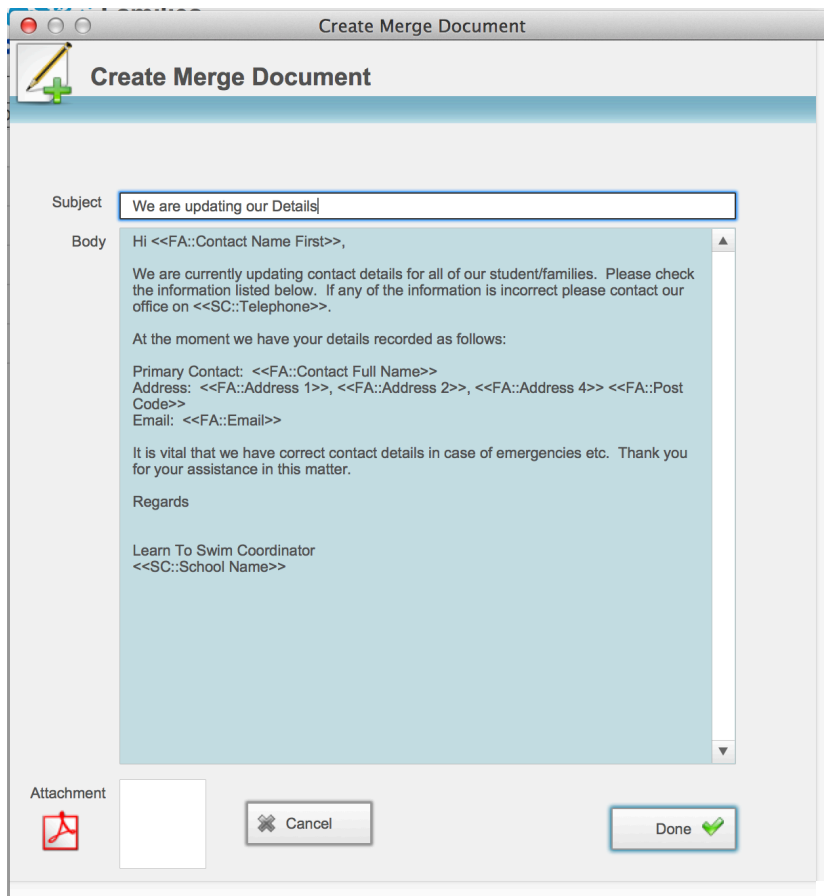
30. Click the **Continue** button.

31. The **Create Merge Document** dialog box will be displayed on your screen. Select the template you wish to use or click Use Blank Document

32. Click the **Continue** button.



33. The selected template will be displayed on your screen. Edit the content of the template as required.



34. Click the **Done** button to complete the merge or Cancel to exit the script with making a change.

NB: If Done was selected at step 17 a personalised document will be created for each family, it will automatically be printed or emailed. A copy of each document will be placed on the respective Family record.

Importing Family Data

When you import data, you're bringing data from another file into Splash. When you import data into an existing FileMaker Pro file, you can:

- add new records from the source file
- update records with information from the source file
- update matching records with information from the source file

Importing Records from Excel

17. Click once on the **Splash** icon on the top left corner of your screen.

18. Select the **Families List** icon

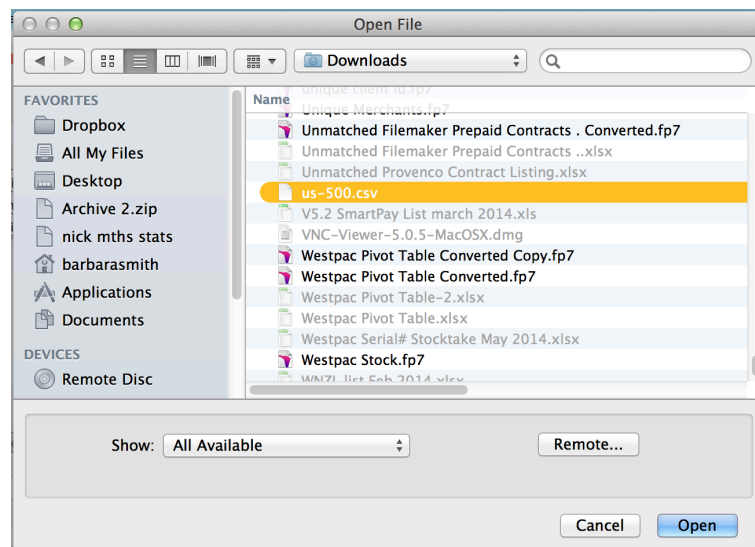


19. The Families List View screen will be displayed.

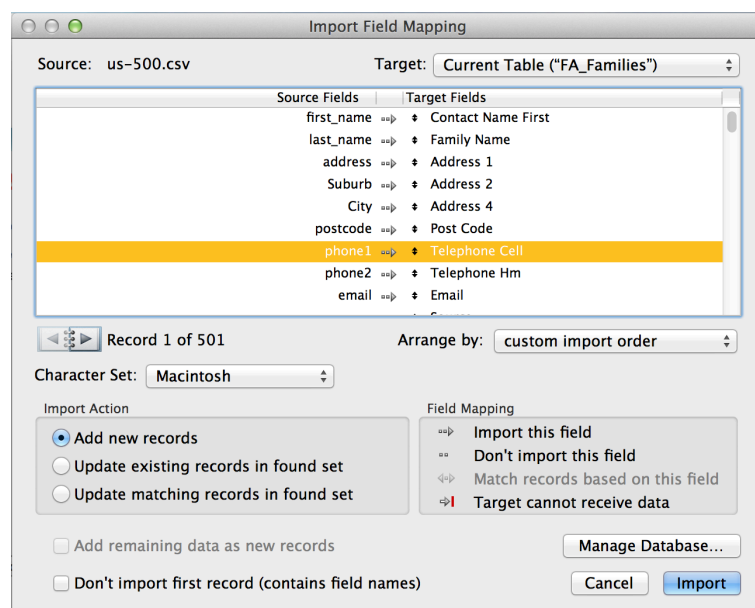
20. Select **Import Family Data** from the **Scripts** menu.

21. The **Open File** dialog will be displayed on your screen.

22. Locate the file containing the data you wish to import and click the **Open** button.



23. The Import Field Mapping dialog will be displayed on your screen.



24. In the **Import Action** area, choose the type of import to perform.

To add new records to the end of the target file – select **Add New Records**



To update the found set of records in the target file with the records you're importing – select **Update existing records in found set.**

To update data in the target file with the data from matching records in the source – select **Update matching records in the found set.**

15. If the first record of the data you're importing contains field names (column headings) instead of data, select **Don't import first record (contains field names)**.

Selecting **Don't import first record (contains field names)** skips the first record during import.

16. Drag fields in the Target Field column to align with fields in the Source Field column to indicate where data will be imported or updated.

To align a field, move the pointer over the  icon next to a target field name in the list. When the pointer changes to a double arrow , drag the field to a new location.

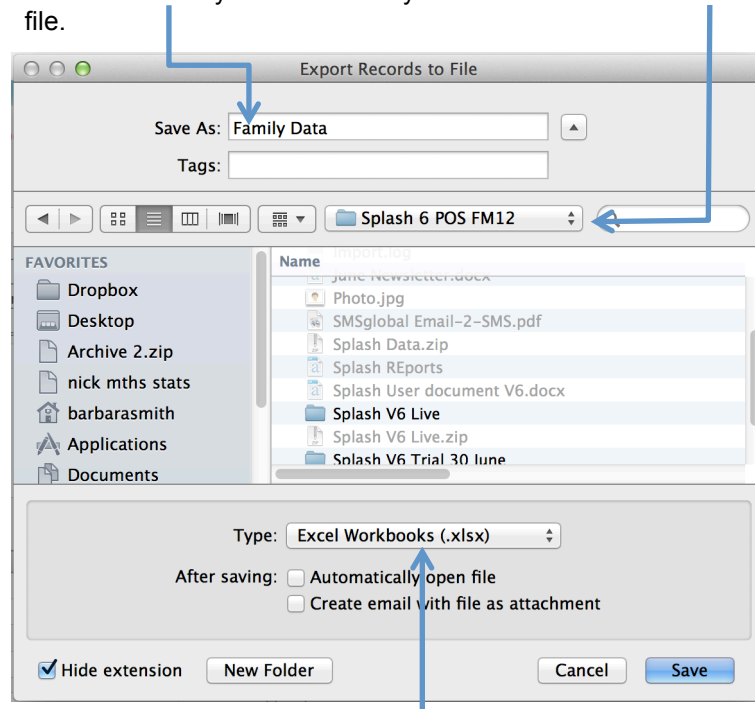
17. When all fields have been aligned correctly, click the **Import** button.

Exporting Family Data

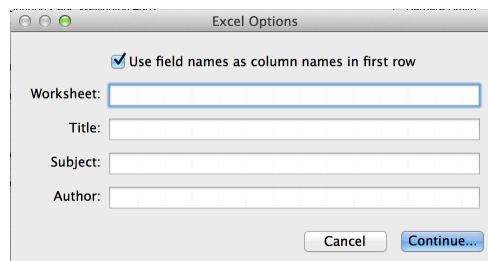
You can export Splash data to a new file and then open it in another application . For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

Exporting Records to Excel

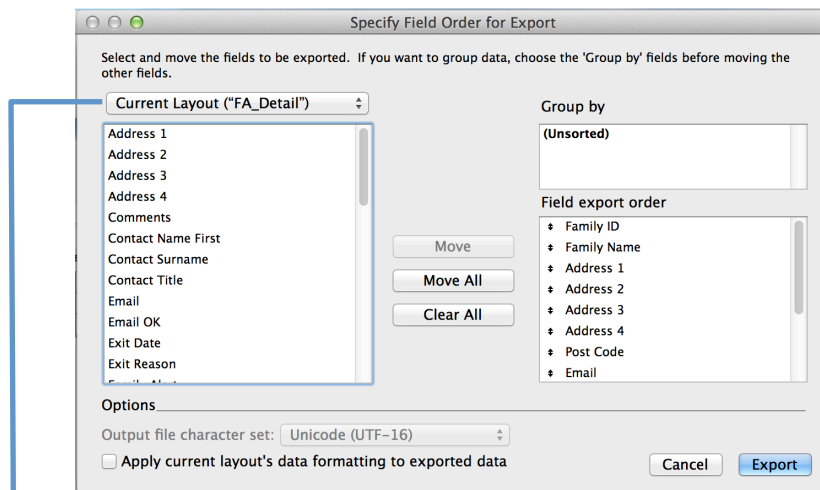
27. Use the **Finding a Family** function to locate the group of records you wish to export.
28. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
29. Select **Export Family Data** from the **Scripts** menu.
30. The **Export Records to File** dialog will be displayed on your screen.
31. Enter the name you wish to call your file and choose a location to store the file.



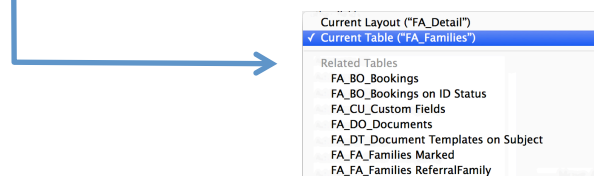
32. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
33. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



34. The **Specify Field Order for Export** dialog will be displayed on your screen. Use this dialog to indicate the order of the fields in which Splash will export the data.
35. All fields displayed in the **Field Export Order** list will be exported.
36. To move a field to the **Field Export Order** simply double-click the field name on the left of the screen.



37. To include a related field choose the name of the related table from the list in the upper left of the dialog, then double-click the required field.



38. When all the required fields are displayed in the Field Export Order list click the **Export** button.

39. The Excel file will be saved to your computer ready for use.

Family ID	Family Name	Address 1	Address 2	Address 3	Address 4	Post Code	Email	Telephone default	Contact
2	Smith	6A Ernestole Crescent	Tawa	Churton Park	Wellington	4001	barbaras@extra.co.nz	0772222082	Barbara
3	Smith	89 Roberts Road	Tawa			4008	computerize@extra.co.nz	0772222082	David
4	Anderson	876 Somewhere Rd	Tawa		Wellington	4010	computerize@extra.co.nz	09 897 9845	David
5	King	46 Brooklyn Rd	Brooklyn		Wellington	4008	computerize@extra.co.nz	05 678 4564	Nathan
6	McDougal	118 South St	Newlands		Wellington	4006	computerize@extra.co.nz	04 478 3156	Mary
7	Williams	171 Chapel St	Rhandallah		Wellington	4005	computerize@extra.co.nz	04 477 8952	Malcolm

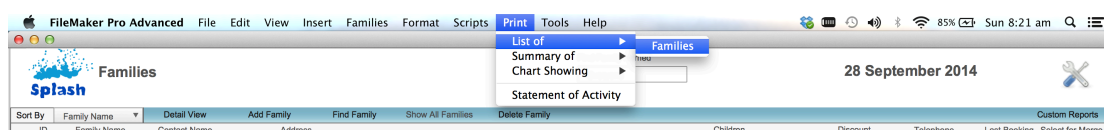
Printing Family Reports

You must be in the Families module of Splash to generate the following reports. All reports are accessed from the Print menu.

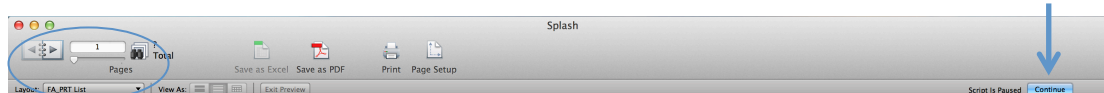
Printing a List of Families

This report provides a listing of family ID, address and contact details, it should be printed and kept as a reference guide for making bookings.

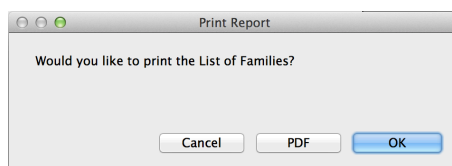
15. Use the **Finding a Family** function to locate the group of records you wish to include in your report.
16. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
17. Select **List of ...** from the Print menu and select **Families** from the pop-out menu displayed.



18. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



19. The **Print Report** dialog will be displayed on your screen.



20. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

List of Families

Family Name and Contact

Students

ANDERSON	David	876 Somewhere Rd, Tawa, Wellington 4010	09 897 9845	3
APLIN	Sylvia	76 High St, Tawa, Wellington 4010	04 236 5981	3
APOLLO	Martha	78 Youngs Road, Tauranga 7902	756 7898	2
BEAUCHAMP	Russell			
BRADLEY	Patricia	943 Beach Parade, Tauranga 7902	765 4563	1
BROWN	Peter	234 any street, Wellington		1
BROWN	Sam	345 Nowhere St, Brooklyn, Wellington 4009	04 564 3212	4
BUCHANAN	Debbie	29 Victoria St, Khandallah, Wellington 4007	0272222082	2
CRANDLEY	Joanne	123 Any St, Wellington		1
FAIRBROTHER	Mark	56 Watt St, Tatahi Bay, Wellington 4012	04 789 4568	2
HARGREAVES	Susan	24 lane St, Wallaceville, Upper Hutt 5014	0272222082	2
HARPER	Edith	76 Colombo Road, Tawa, Wellington 4010	04 236 4567	2
HUGHSON	Ngaire	98 Barrett St, Ngaio, Wellington 4007	04 654 9524	2
JESSOP	Tony	180 Essex St, Ngaio, Wellington 4007	04 478 3215	3

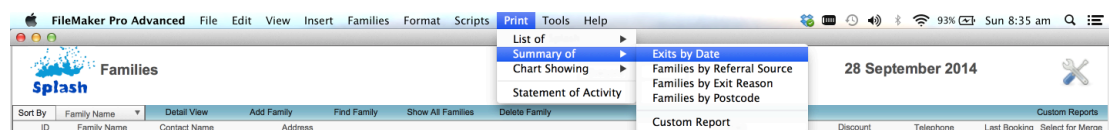
Printing a Summary of Exits by Date

This report counts the number of families and the number of students who have exited the swim school.

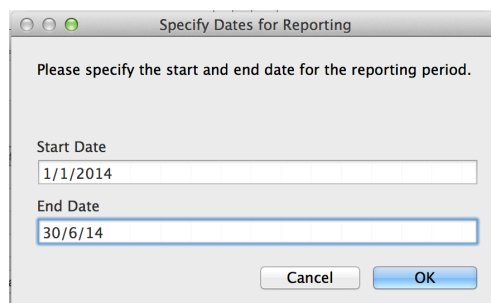
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families List** icon



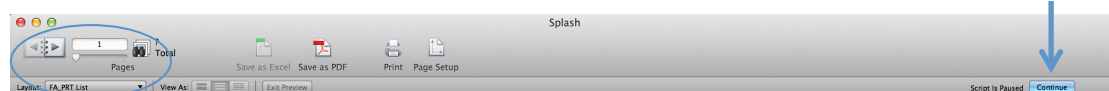
3. The Families List View screen will be displayed.
4. Select **Summary of ...** from the Print menu and select **Exits by Date** from the pop-out menu displayed.



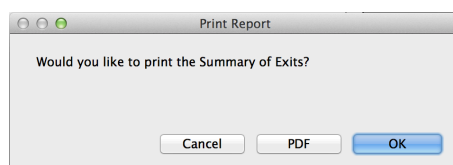
5. The Specify Date for Reporting dialog will be displayed on your screen. Enter the Start Date and End Date for the families to be included in your report.



6. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



7. The **Print Report** dialog will be displayed on your screen.



8. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Summary of Families		
Summary of Exits	Number of Families	Number of Students
Financial	1	3
Goals Met	2	2
Other Commitments	1	4

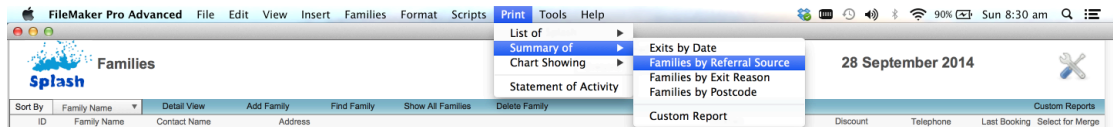
Printing a Summary of Referral Source

This report counts the number of families and the number of students for each source of referral.

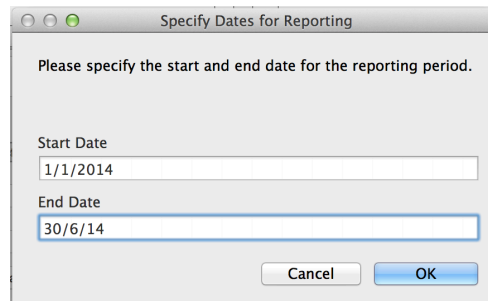
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families List** icon



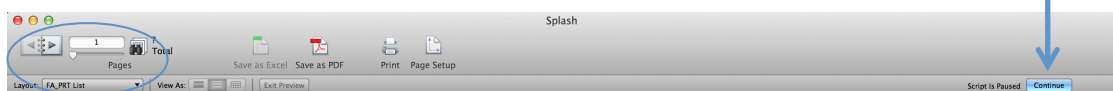
3. The Families List View screen will be displayed.
4. Select **Summary of ...** from the Print menu and select **Families by Referral Source** from the pop-out menu displayed.



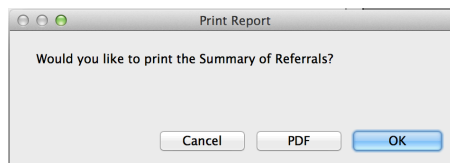
5. The Specify Date for Reporting dialog will be displayed on your screen. Enter the Start Date and End Date for the families to be included in your report.



6. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



7. The **Print Report** dialog will be displayed on your screen.



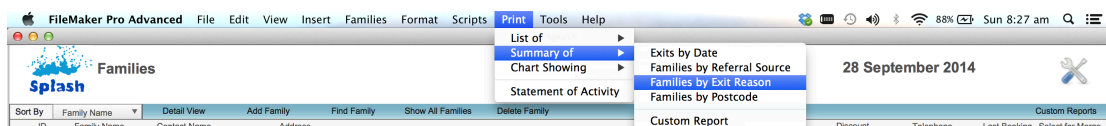
8. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Summary of Families		
Summary of Referrals		
	Number of Families	Number of Students
Existing Client	7	13
Family	3	6
Local Newspaper	4	16
Preschool	2	4
School	9	22
Signage	12	26

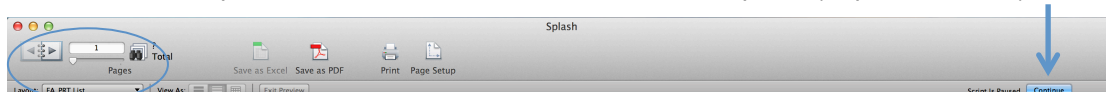
Printing a Summary of Exit Reasons

This report counts the number of families and the number of students who have exited the swim school.

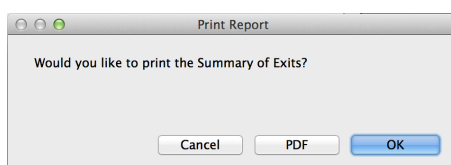
1. Use the **Finding a Family** function to locate the group of exited families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Families by Exit Reason** from the pop-out menu displayed.



4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.



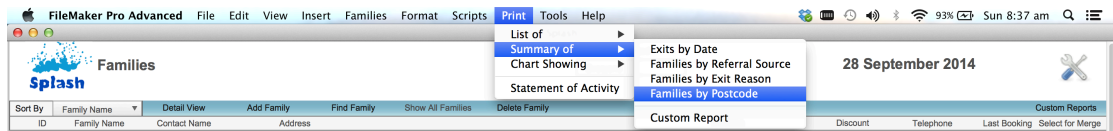
6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Summary of Families		
Summary of Exits	Number of Families	Number of Students
Financial	1	3
Goals Met	2	2
Other Commitments	1	4

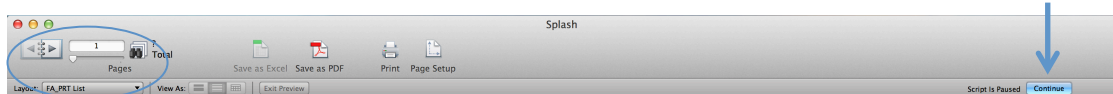
Printing a Summary of Postcodes

This report counts the number of families and the number of students for each postcode.

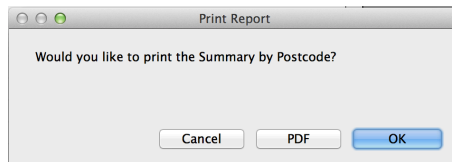
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Families by Postcode** from the pop-out menu displayed.



4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.



6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Summary of Families		
Summary by Postcode		
	Number of Families	Number of Students
PC = :4000	1	1
PC = :4001	4	9
PC = :4002	1	3
PC = :4005	2	6
PC = :4006	1	3
PC = :4007	4	9
PC = :4008	6	16
PC = :4009	1	4
PC = :4010	7	17
PC = :4012	1	2
PC = :5014	1	2

Printing a Custom Report

In addition to the generic family reports, Splash provides custom report writing. Custom reports are specific reports layouts where you can change the grouping for summary totals.

Displaying the Custom Report Dialog

7. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
8. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
9. Click once on the Custom Report button displayed in the blue stripe at the top of your screen.



2. The report writer will be displayed on your screen.

A screenshot of a dialog box titled 'Produce Summary Report'. Inside, there's a section titled 'Specify Report Format' with a blue header and a computer icon. Below this, there are four steps:
Step 1: Choose Existing Report Format
Report Name: Summary by Referral Source (dropdown menu)
Step 2: Choose/Update Report Summary Groups
Group 1: Summarize by Referred From (dropdown menu)
Group 2: (empty dropdown menu)
Group 3: (empty dropdown menu)
Show Detail: ☒
Step 3: Enter Report Title
Report Title: Summary by Referral Source (text field)
Step 4: Produce Report
At the bottom right is an 'OK' button with a green checkmark. At the bottom left is a 'Cancel' button with a red X icon.

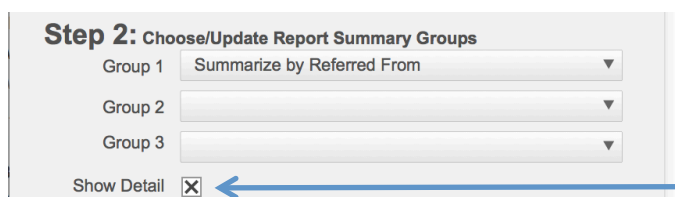
Defining a Custom Report

The custom report dialog is divided into three steps. When you have completed each of the three sections you are ready to generate your report. Create your custom report by completing the steps outlined below:

7. Choose the Report Type
8. Choose the Reporting Groups.
9. Give your report a title.

The three fields displayed at **Step 2** are used to define how the information in your report will be structured. Summary totals will be displayed for each group you have defined at levels one, two and three.

If you wish to include detailed information about each family in your report, click the **Show Detail** button.



Step 2: Choose/Update Report Summary Groups

Group 1

Group 2

Group 3

Show Detail ☒

Custom Report Sample (No Detail)

The sample report below demonstrates the use of summary levels. Show Detail was left blank when the report was created.

Summary of Families		
Summary by Referral Source	Number of Families	Number of Students
Existing Client	8	16
Family	4	7
Local Newspaper	4	16
Preschool	2	4
School	9	22
Signage	19	29
Television	1	1

Custom Report Sample (Show Detail)

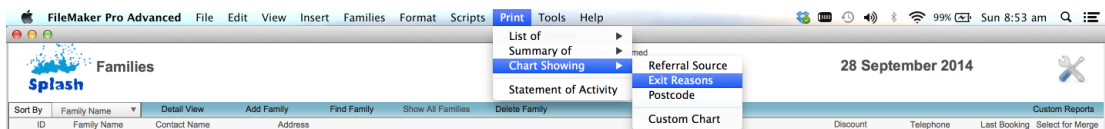
Information in the report below has been grouped by the same categories, however this time **Show Detail** has been selected.

Summary of Families		
Summary by Referral Source	Number of Families	Number of Students
Existing Client	8	16
JESSOP	180 Essex St, Ngaio, Wellington 4007	04 478 3215
MCARTHUR	39 River Road, Kelson, Wellington 4008	04 566 7894
MORRISON	8 Victoria St, Redwood, Wellington 4010	04 237 8536
PEARSON	456 Any St, Wellington 4000	04 477 6543
RIM	322 New Horizon Blvd, Johnsonville, Wellington 4000	027 543 2287
SMITH	89 Roberta Road, Tawa 4008	0272222082

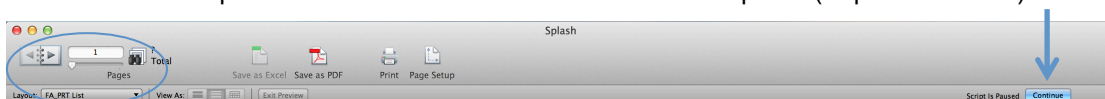
Printing a Chart

Printing a Chart Showing Families by Referral Source

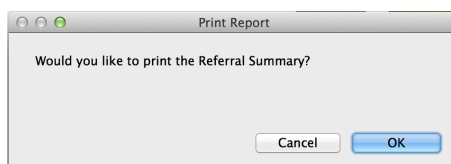
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Referral Source** from the pop-out menu displayed.



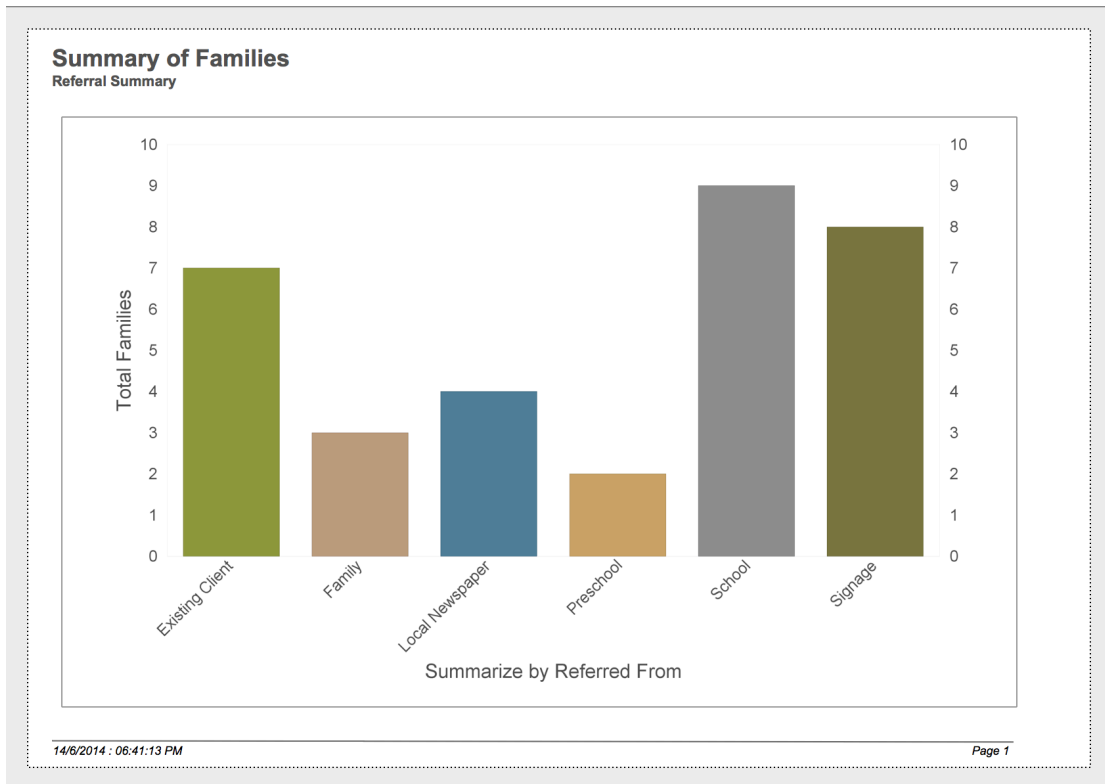
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.

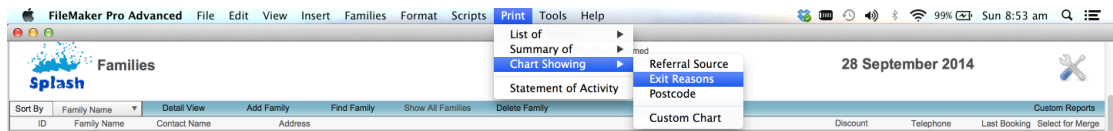


6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

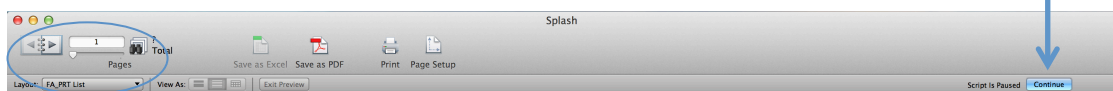


Printing a Chart Showing Families by Exit Reason

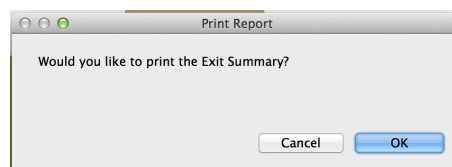
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Exit Reason** from the pop-out menu displayed.



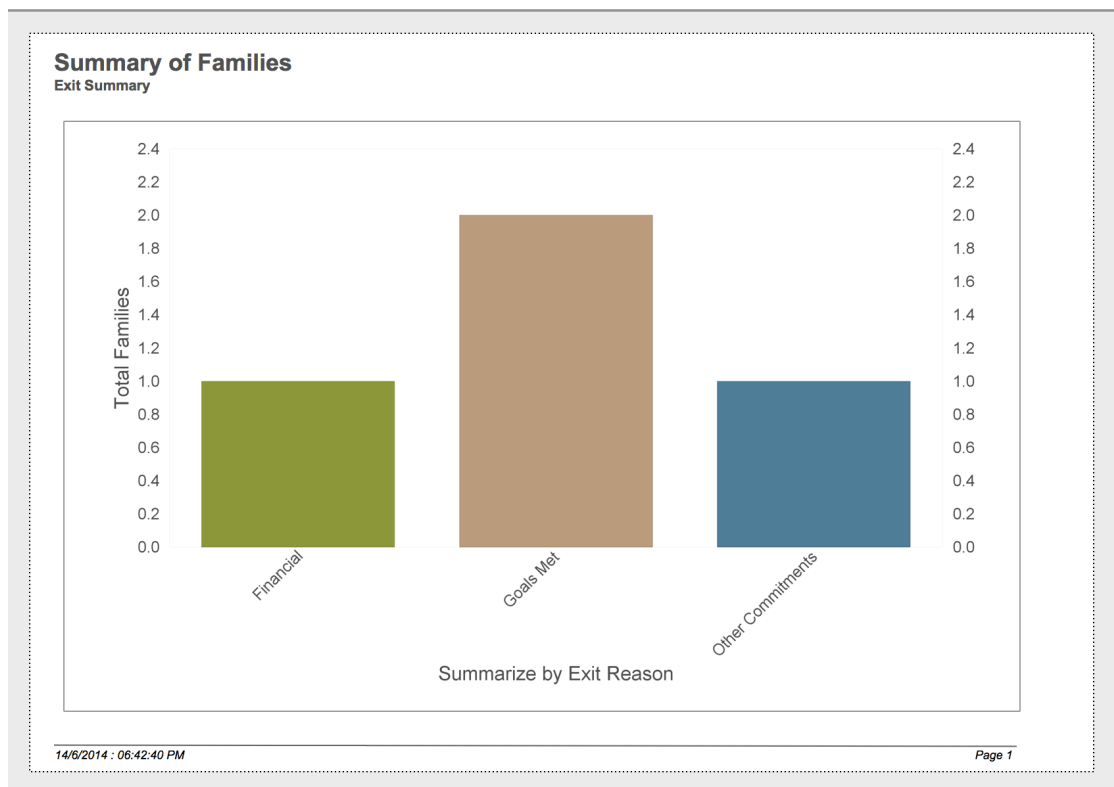
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.

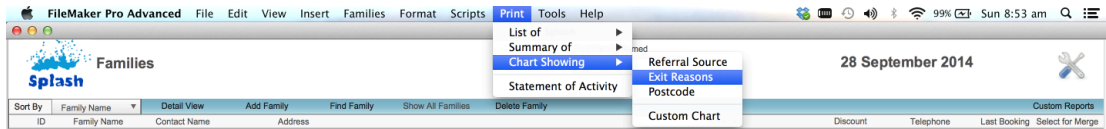


6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

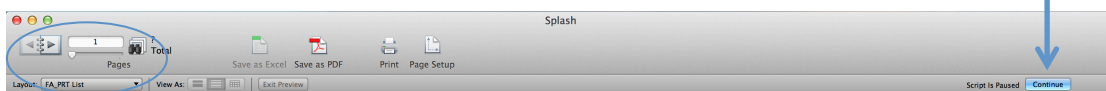


Printing a Chart Showing Families by Postcode

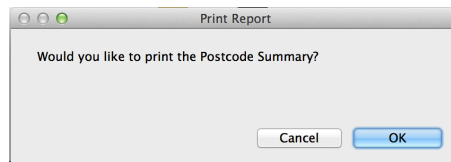
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Postcode** from the pop-out menu displayed.



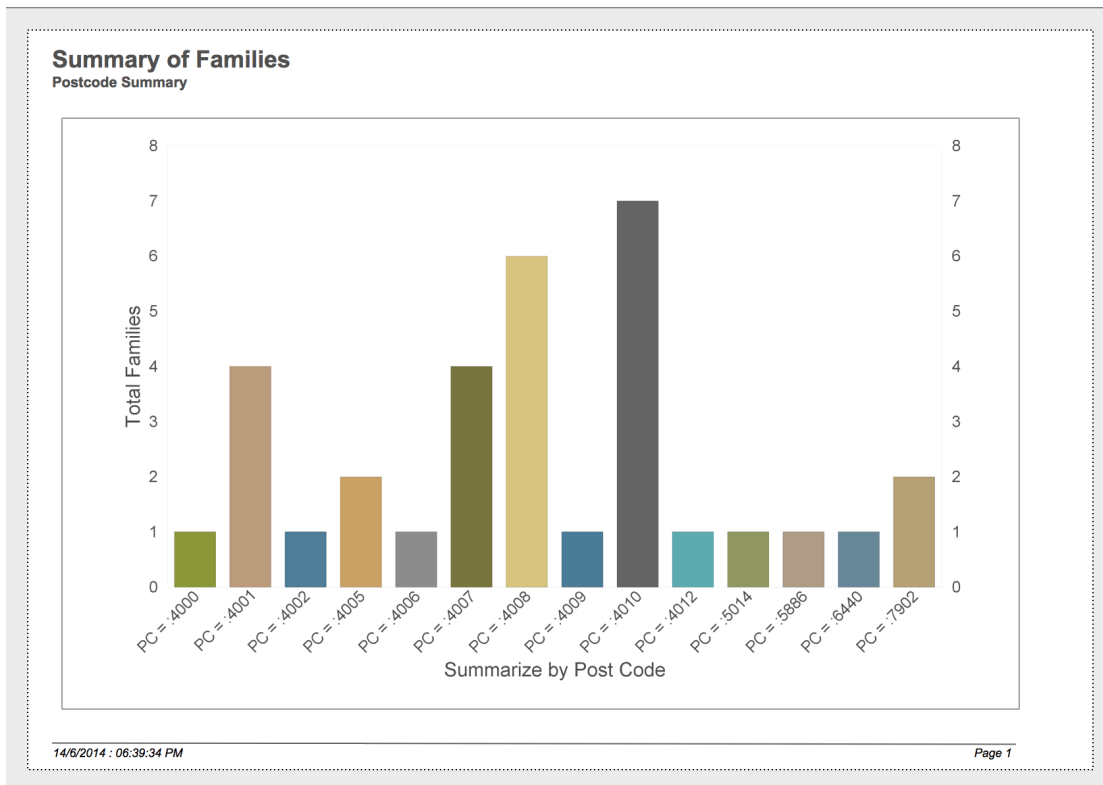
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.



6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.



Defining Booking Details

This module contains a record of each permanent or catchup booking. Attached to each booking record is a progress report containing the goals each student is aiming to achieve. Use this module to print a selection of booking related documents and reports e.g. confirmation letters, instructor lists, attendance summaries, assessment lists and student certificates. An automated rollover function enables you to carry all current bookings forward to the subsequent term.

The Booking Record

In the centre of the screen you will see generic student information along with a photograph of the child. Along with student information there are three central tab cards that contain information about the Session, Booking Info, and Primary Contact information.

Each booking record also contains the following three tab cards on the right of the screen:

Attendance and Payments – displays attendance for all dates within the block along with information about how the booking cost was defined. The cost of booking includes the initial cost, less any discount, credits, or free lessons. In addition to these values which reduce the value of a booking; you can also add a late payment fee. All payments made towards the booking will be displayed at the base of the screen.

The screenshot shows the 'Splash Bookings' application window. The top bar includes the 'Splash' logo, the title 'Bookings', the date '14 June 2014', and a settings icon. Below the top bar is a navigation menu with options: 'List View', 'Add Booking', 'Find Booking', 'Show All Bookings', 'Delete Booking', and 'Custom Reports'. The main interface is divided into several sections:

- Filter By Student Name:** A dropdown menu set to 'Everyone' and a 'Term' dropdown set to '2014'. Below this is a 'Sort By' dropdown set to 'First Name'.
- Student List:** A list of students with columns for Name, Day, and Week. 'Gareth Buchanan' is selected.
- Student Details:** A form for 'Gareth Buchanan' with fields for Name, Gender (M), Age (10_2m), Telephone (0272222082), and Medical. A 'Catchup' checkbox is set to 'No'.
- Session Details:** A form for 'Session ID 1844' with fields for Class ID (dol), Class Name (Dolphins), Class Level (5), Programme, Instructor (Brian Thomson), Location (Main Pool), Start Date (4/5/2014), End Date (5/7/2014), Start Time (9:30 AM), Weekday (Sunday), Term (2), and Shift (Morning).
- Cost of Session:** A form with 'Cost Method' (Cost Per Session), 'Cost Unit', 'No. of Sessions' (9), and 'Total Cost' (\$0.00). 'Payment Required By' is 4/5/2014.
- Attendance and Payments:** A section with 'Student Attendance' (a grid of dates from 4/5/2014 to 22/6/2014), 'Cost of Booking' (Initial Cost \$0.00, Discount Applied \$0.00, Credit Applied, Value of Free Lessons, Exit Value Written Off, Late Payment Fee, Payments Received \$0.00, Balance Due \$0.00), and 'Payments Received' (a table with columns for Date, Amount, and Description).

NB: If the session details are updated after the booking has been made, use the **Update Session Details** command within the Scripts menu.

Enter a Credit Value to reduce the cost of a session

Goals– displays the goals and progress towards completion of all goals associated with the current booking. Assessment information is transferred from one booking to another when a student is rebooked at the same level for another term. The Student Level defines the goals that are displayed. By default the Student Level is set at the same value as the class level. You have the ability to override the default and choose another level for this booking.

The screenshot shows the 'Goals' tab for a student booking. The interface includes a sidebar with a student list, a central student profile area, and a main goals table.

Student Profile:

- Student ID: 103
- Name: Gareth Buchanan
- Gender: M, Age: 10_2m
- Telephone: 0272222082
- Medical:
- Comments:
- Catchup: No

Session Details:

- Class ID: dol, Session ID: 1844
- Class Name: Dolphins
- Class Level: 5
- Programme:
- Instructor: Brian Thomson
- Location: Main Pool
- Start Date: 4/5/2014, End Date: 5/7/2014
- Start Time: 9:30 AM, Weekday: Sunday
- Term: 2, Shift: Morning
- Cost of Session: Cost Method: Cost Per Session, Cost Unit: \$0.00, No. of Sessions: 9, Total Cost: \$0.00, Payment Required By: 4/5/2014

Goals Table:

Goal	Level	Date Achieved	Status
Bubble and breathe 10 metres	Mastered	4/04/14	✗
Kick on Back 10 metres	Mastered	4/04/14	✗
Breaststroke Kick 5 metres	Learning	28/04/14	✗
Butterfly Arms 5 metres	Learning	28/04/14	✗
Testing a Level with 5 Goals	Mastered	1/05/14	✗
Testing a Level with 6 Goals	Mastered	28/04/14	✗
Testing a Level with 7 Goals	Introduced		✗
Testing a Level with 8 Goals	Mastered	3/05/14	✗

Additional Information:

- Certificate Issued:
- Assessed:
- Next Term Move to Class:
- Rollover This Booking: Yes
- Rebooked Next Term: Yes

Comments– displays two types of comments; Booking Comments and Transfer Notes. Transfer notes can be edited manually, however are updated by Splash whenever a student booking is changed from one session to another. Transfer notes will show the details of the previous booking held.

The screenshot shows the 'Comments' tab for the same student booking. The interface is similar to the 'Goals' tab, but the main area displays transfer notes.

Student Profile:

- Student ID: 103
- Name: Gareth Buchanan
- Gender: M, Age: 10_2m
- Telephone: 0272222082
- Medical:
- Comments:
- Catchup: No

Session Details:

- Class ID: dol, Session ID: 1843
- Class Name: Dolphins
- Class Level: 5
- Programme:
- Instructor: Brian Thomson
- Location: Main Pool
- Start Date: 4/5/2014, End Date: 5/7/2014
- Start Time: 2:00 PM, Weekday: Sunday
- Term: 2, Shift: Afternoon
- Cost of Session: Cost Method: Cost Per Session, Cost Unit: \$10.00, No. of Sessions: 9, Total Cost: \$90.00, Payment Required By: 4/5/2014

Transfer Notes:

Previously booked in Dolphins on Sunday at 9:30 AM with Brian Thomson, moved on 14/6/2014.

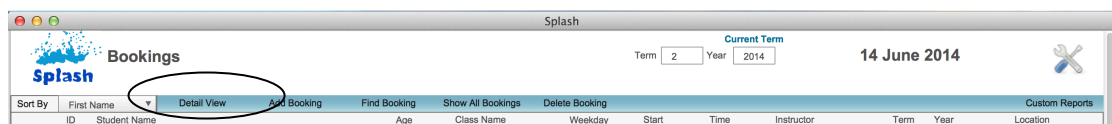
Listing Booking Records

Each record in your database can be displayed in either the entry screen or list view. List view will display all records in the found set – see the bottom left corner of the screen for the size of the current found set.

NB: Click the magnifier to the left of the Family ID to display the data entry screen.

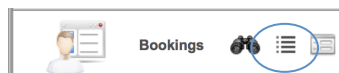
Displaying a List of Bookings

1. Click once on the **List View** button displayed in the blue stripe at the top of your screen.



Displaying a List of Bookings (from outside the Booking Screen)

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking List** icon

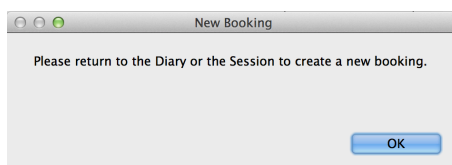


3. The Booking List View screen will be displayed

Entering a New Booking

A new booking record must be created whenever a student registers to attend a session. The student will not appear in the class unless a booking has been generated.

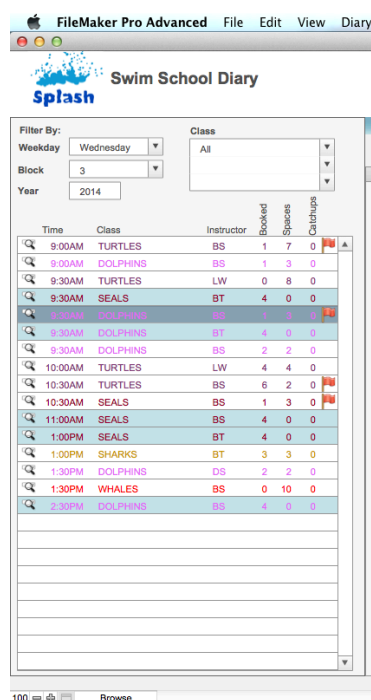
Bookings can only be created from either the Diary or the Session screen. If you attempt to create a booking within the Bookings module the following dialog will be displayed.



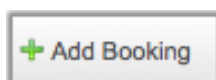
Entering a New Booking in the Diary

Bookings may be made within the diary or within the Sessions module. The diary provides a more efficient method of booking a student into a session.

1. Select the required Day, Term and Year at the top of the diary screen to locate the session you wish to book the student in to.
2. Within the left pane, click once on the session you wish to book the student in to.



3. Current bookings for the selected session will be displayed on the right of your screen.



4. Click once on the **Add Booking** button to display the **Select a Student** dialog.

Create New Booking

Enter New Booking Details

Must Pay at Time of Booking

Name: John Smith
 Telephone: 0272222082
 Address: 89 Roberta Road, Tawa 4008
 Age: 7_4m Gender: # Bookings This Block: 2

Session Details

Session ID: 7456 Class ID: DOL Block: 3
 Class Name: Dolphins Year: 2014
 Instructor: Barbara Smith Payment Required By: 26/10/2014
 Location: Main Pool
 Start Time: 09:30:00 No. of Sessions: 12
 Start Date: 26/10/2014 End Date: 2/12/2014 Weekday: Sunday

Cost of Lessons	Direct Debit	Comments
Cost Method: Cost Per Session @ \$10.00 Initial Cost: \$120.00		
Discount Rate: 10% Discount Type: Percent		Discount Applied: \$12.00
Credit Due: <input type="text"/> Credit Taken: <input type="text"/>		Credit Applied: <input type="text"/>
Payment by Direct Debit: <input type="text"/>		Value of Free Lessons: \$0.00
		Balance Due: \$108.00

8. Confirm the **Start Date** and number of sessions for the new booking.
9. Customise any pricing if necessary and click the **Done** button to save the booking and return to the diary screen.

Working in the Booking Screen

The Booking screen displays all information relevant to the selected booking. It will contain:

- The name of the student
 - The name of the Class
 - Details of the session
 - The booking payment information
 - Attendance information...
- and much more

Use this screen to either review information about the current booking or use it to navigate to other areas of Splash.

The screenshot shows the 'Bookings' screen in the Splash application. The top navigation bar includes 'List View', 'Add Booking', 'Find Booking', 'Show All Bookings', and 'Delete Booking'. The date '14 June 2014' is displayed in the top right corner. The main content area is divided into several sections:

- Filter By Student Name:** A dropdown menu set to 'Everyone' and a 'Term' dropdown set to '2' for the year '2014'. A 'Sort By' dropdown is set to 'First Name'.
- Student List:** A list of students with columns for Name, Class, and Session. 'Gareth Buchanan' is selected, showing 'DOL Sun'.
- Student Details:** Fields for Student ID (103), Name (Gareth Buchanan), Gender (M), Age (10_2m), Telephone (0272222082), Medical, and Comments. A 'Catchup' checkbox is set to 'No'.
- Session Details:** Fields for Class ID (dol), Class Name (Dolphins), Class Level (5), Programme, Instructor (Brian Thomson), Location (Main Pool), Start Date (4/5/2014), End Date (5/7/2014), Start Time (9:30 AM), Weekday (Sunday), Term (2), Year (2014), and Shift (Morning).
- Cost of Session:** Fields for Cost Method, Cost Per Session, Cost Unit, No. of Sessions (9), Total Cost (\$0.00), and Payment Required By (4/5/2014).
- Attendance and Payments:** A table for 'Student Attendance' with columns for Date, Time, and Status. Dates shown are 4/5/2014, 1/6/2014, 29/6/2014, 11/5/2014, 8/6/2014, 18/5/2014, 15/6/2014, and 25/5/2014, 22/6/2014.
- Cost of Booking:** Fields for Initial Cost (\$0.00), Discount Rate (10%), Type (Percent), Discount Applied (\$0.00), Credit Due, Credit Taken, Credit Applied, Value of Free Lessons, Exit Value Written Off, Late Payment Fee, Payments Received (\$0.00), and Balance Due (\$0.00).
- Payments by Direct Debit:** A checkbox.
- Payments Received:** A table with columns for Date, Amount, and Description.
- Locate Family's Bookings with a Balance:** A button.

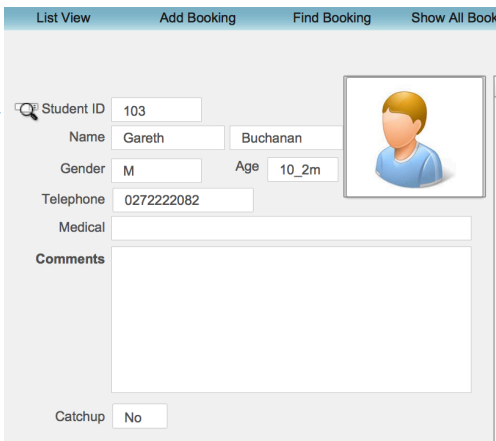
Navigating to the Student Details

Click the magnifier to the left of the Student ID

This close-up view shows the 'Student ID' field with the value '103'. To the left of the field is a magnifying glass icon. A blue arrow points from the text 'Click the magnifier to the left of the Student ID' to this icon. The surrounding fields for Name, Gender, Age, Telephone, Medical, and Comments are also visible.

Transferring a Booking to Another Student

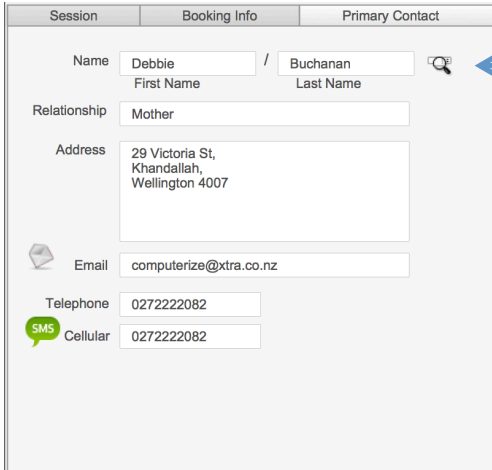
Hold down the Shift Key while you click the magnifier to the left of the Student ID



The screenshot shows a form with tabs: List View, Add Booking, Find Booking, and Show All Bookings. The Student ID field contains '103'. To its left is a magnifier icon. A blue arrow points from the text above to this magnifier icon. Other fields include Name (Gareth Buchanan), Gender (M), Age (10_2m), Telephone (0272222082), Medical, Comments, and a Catchup checkbox (No). A student profile picture is shown on the right.

Navigating to the Family Details

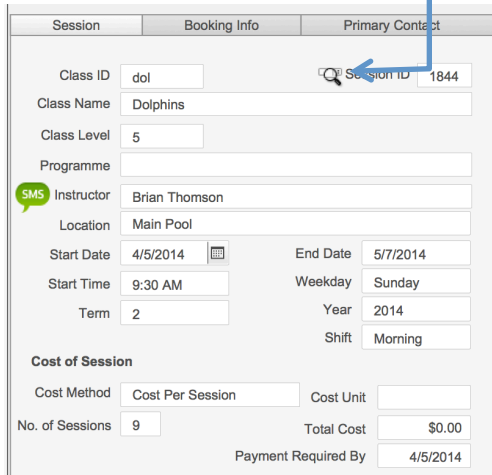
Click the magnifier to the right of the Primary Contact Last Name



The screenshot shows a form with tabs: Session, Booking Info, and Primary Contact. The Primary Contact section includes Name (Debbie Buchanan), Relationship (Mother), Address (29 Victoria St, Khandallah, Wellington 4007), Email (computerize@xtra.co.nz), Telephone (0272222082), and Cellular (0272222082). A magnifier icon is to the right of the Primary Contact Last Name field. A blue arrow points from the text above to this magnifier icon.

Navigating to the Session Details

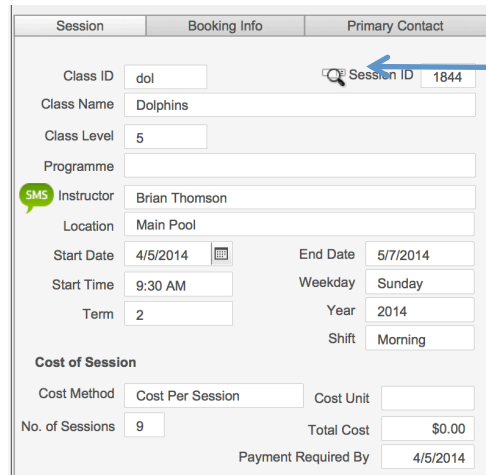
Click the magnifier to the right of the Session ID



The screenshot shows a form with tabs: Session, Booking Info, and Primary Contact. The Session section includes Class ID (dol), Class Name (Dolphins), Class Level (5), Programme, Instructor (Brian Thomson), Location (Main Pool), Start Date (4/5/2014), End Date (5/7/2014), Start Time (9:30 AM), Weekday (Sunday), Term (2), Year (2014), Shift (Morning), Cost of Session (Cost Method: Cost Per Session, Cost Unit, No. of Sessions: 9, Total Cost: \$0.00), and Payment Required By (4/5/2014). A magnifier icon is to the right of the Session ID field. A blue arrow points from the text above to this magnifier icon.

Transfer the Child to Another Session

Hold down the SHIFT key while you click the magnifier to the right of the Session ID



The screenshot shows the 'Booking Info' tab of a session management interface. At the top, there are three tabs: 'Session', 'Booking Info', and 'Primary Contact'. The 'Booking Info' tab is active. The form contains the following fields:

- Class ID: dol
- Class Name: Dolphins
- Class Level: 5
- Programme: (empty)
- Instructor: Brian Thomson (with a green SMS icon to the left)
- Location: Main Pool
- Start Date: 4/5/2014
- End Date: 5/7/2014
- Start Time: 9:30 AM
- Weekday: Sunday
- Term: 2
- Year: 2014
- Shift: Morning

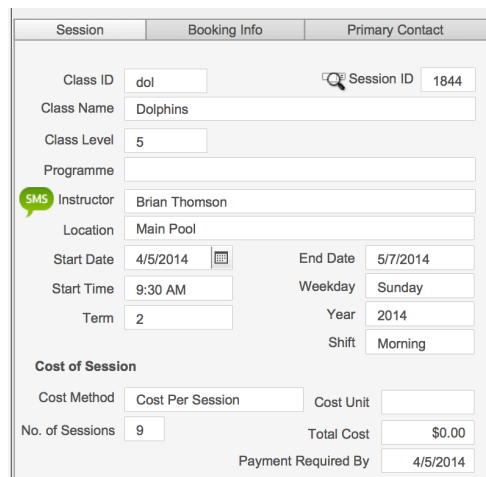
Below these fields is the 'Cost of Session' section:

- Cost Method: Cost Per Session
- Cost Unit: (empty)
- No. of Sessions: 9
- Total Cost: \$0.00
- Payment Required By: 4/5/2014

An arrow points from the text above to the magnifier icon next to the Session ID field, which contains the value 1844.

Sending an SMS to the Instructor

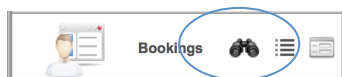
Click the SMS icon to the left of the Instructor Name



This screenshot is identical to the one above, showing the 'Booking Info' tab. An arrow points from the text above to the green SMS icon located to the left of the Instructor's name, Brian Thomson.

Finding a Booking

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking Find** icon



3. The **Search for a Booking** dialog box will be displayed on your screen.

A screenshot of the 'Search for a Booking' dialog box. The dialog has a title bar 'Search for a Booking' and a 'Splash' icon. It contains two main sections of search criteria. The left section includes fields for Student ID, Name, Gender, Medical, Address, Contact, Email, Comments, and Transfer Notes. The right section includes fields for Booking ID, Date Booked, Booking Status, Class Name, Instructor, Weekday, Shift, Term, Year, and Catchup Lesson. Below these are two summary fields: 'Number of Student Bookings in the Term' and 'Number of Family Bookings in the Term'. At the bottom, there are tabs for Session Info, Booking Info, Cost of Lessons, Attendance, Payment Info, and Exit Info. The Session Info tab is active, showing fields for Class ID, Class Name, Instructor, Start Date, End Date, Start Time, Weekday, Frequency, Location, Programme, Classification, No. of Sessions, Class Level, Student Level, and Previous Session ID. At the bottom of the dialog are buttons for 'Cancel', 'New Request', 'Omit Records', 'Constrain Set', 'Extend Set', and 'Find Now'. A status bar at the very bottom shows '100' and a 'Find' button.

4. Enter the criteria for your find by typing your request in the corresponding field/s.
5. Click the **Find Now** button.
6. If one record is located the record will be displayed on the Booking entry screen. If multiple records are located the found set will be displayed in the list view.

A screenshot of the Booking entry screen. It features a tabbed interface with tabs for Session Info, Booking Info, Cost of Lessons, Attendance, Payment Info, and Exit Info. The Payment Info tab is active, displaying a grid of fields for financial data: Cost Method, Discount Rate, Credit Due, Credit Taken, Initial Cost, Discount Applied, Credit Applied, Value of Free Lessons, Exit Value Written Off, Late Payment Fee, Payments Received, and Balance Due. There is also a field for 'Payment Required By'.


NB: Access additional find criteria by clicking the tab cards at the base of the dialog box.

NB: See *Advanced Find Techniques* within this guide for assistance with Constraining or Extending the found set.


Transfer the Booking To Another Student

This command enables you to transfer the selected booking to an alternative student. Given a booking with payment attached cannot be deleted; you may need this function if you have accidentally booked and processed a payment for an incorrect child.

1. Use the **Finding a Booking** function to locate the record you wish to update.
2. When the correct booking screen is displayed simply hold down the Shift key while you click the Student icon displayed to the left of the student's name.



Bookings

14 June 2014


List View Add Booking Find Booking Show All Bookings Delete Booking
Custom Reports

Filter By Student Name:

Everyone

Term 2 Year 2014

Sort By First Name

Amelia Harper	TUR	Wed
Anthony Apollo	DOL	Sun
Billy Jones	SEA	Sun
Bridgette	TUR	Wed
Bruce Taylor	DOL	Sun
Caroline	SEA	Fri
Celia Brown	TUR	Sun
Corey Morrison	SEA	Sun
Craig King	TUR	Sun
Craig King	DOL	Sun
David King	DOL	Fri
denise Taylor	TUR	Wed
Gareth Buchanan	DOL	Sun
Gaylene	DOL	Wed
Georgia Taylor	DOL	Sun
Harry Williams	SEA	Sun
Jack McArthur	DOL	Wed
Jacob Smith	SEA	Sun
Jacob Smith	SEA	Tue
Jacob Smith	SEA	Tue
Jamie watkins	DOL	Sun
Jane White	TUR	Wed
Jennifer Smith	TUR	Wed
Jenny Williams	DOL	Tue
Jessica	TUR	Wed
Jessica Sinclair	DOL	Sat
Jessica Sinclair	DOL	Sat
Joanne Jones	SEA	Sun
Lucas Smith	DOL	Sun

Student ID 15

Name David **King**

Gender Male **Age** 11_11m

Telephone 05 678 4564

Medical

Comments

Catchup No

Session **Booking Info** **Primary Contact**

Class ID dol **Session ID** 1848

Class Name Dolphins

Class Level 5

Programme

Instructor Brian Thomson

Location Main Pool

Start Date 4/5/2014 **End Date** 5/7/2014

Start Time 1:30 PM **Weekday** Sunday

Term 2 **Year** 2014

Shift Morning

Cost of Session

Cost Method Cost Per Session **Cost Unit** \$10.00

No. of Sessions 12 **Total Cost** \$120.00

Payment Required By 4/5/2014

Attendance and Payments **Goals** **Comments**

Student Attendance

4/5/2014	1/8/2014	29/6/2014
11/5/2014	8/6/2014	
18/5/2014	15/6/2014	
25/5/2014	22/6/2014	

Cost of Booking

Initial Cost \$120.00

Discount Rate 10% **Type** Percent **Discount Applied** \$12.00

Credit Due **Credit Taken** **Credit Applied**

Value of Free Lessons \$0.00

Exit Value Written Off

Late Payment Fee \$0.00

Payments Received \$108.00

Balance Due \$0.00

Payments by Direct Debit

Payments Received

24/04/14	146762	Lesson	\$108.00
----------	--------	--------	----------

100

3. The Select a Student dialog box will be displayed on your screen.

[illegible]

4. Your cursor will be placed in the filter field; begin typing the student first name or last name. As you type list of all students matching the name entered will be displayed on your screen.

- To select a student for your booking, simply click once on the student's name, age, or address.

The screenshot shows the 'Splash Bookings' software interface. On the left, a list of students is displayed with columns for Name, Day, and Week. 'Craig King' is selected. The main area shows the student's details: Name (Craig King), Age (5_10m), Telephone (05 678 4564), and a 'Catching up' checkbox. Below this, the 'Session' tab is active, showing booking information for Class ID 'dol', Class Name 'Dolphins', Class Level '5', and Instructor 'Brian Thomson'. The 'Cost of Session' section shows a cost of \$10.00 per session for 12 sessions, totaling \$120.00. On the right, the 'Attendance and Payments' section shows a grid for tracking attendance from 4/5/2014 to 22/6/2014. Below this, the 'Cost of Booking' section shows an initial cost of \$120.00, a discount of \$12.00, and a balance due of \$0.00. A 'Payments Received' table shows a payment of \$108.00 on 24/04/14. A button labeled 'Locate Family's Bookings with a Balance' is visible.

- The selected student information will be displayed in the booking.

NB: If the new student has a permanent discount on file the price of the current booking may change.

Updating Student Details

When you first create a booking, information is copied from the student file into the booking. Class name, session dates, maximum size, cost, level, programme and classification are also all copied to the session you are creating. This command will update student information; it should be used if you have created a booking and later changed any information in the student file.

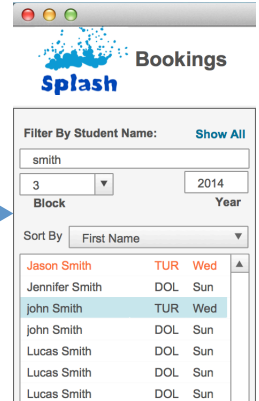
Student details can be updated for a single student or for all students in the found set.

Updating Student Details for the Current Record

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



3. The Booking data entry screen will be displayed, enter the criteria for the record you wish to update in the filter fields at the top of the portal list on the left of your screen.



Filter By Student Name: [Show All](#)

smith

3 2014

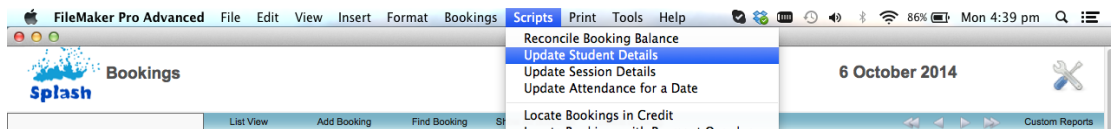
Block Year

Sort By First Name

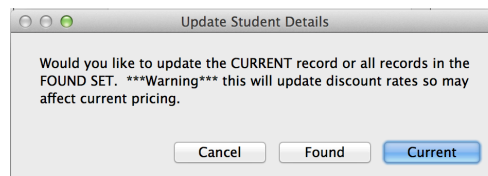
Jason Smith	TUR	Wed
Jennifer Smith	DOL	Sun
John Smith	TUR	Wed
John Smith	DOL	Sun
Lucas Smith	DOL	Sun
Lucas Smith	DOL	Sun
Lucas Smith	DOL	Sun

4. Using the portal on the left of the screen, click once on booking you wish to update.
5. The portal row will be highlighted to indicate the active record. The details of the selected booking will be displayed on the right of your screen.

6. Go to the Scripts menu, select **Update Student Details**.



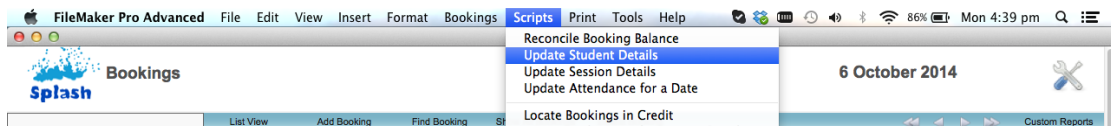
7. The Update Student Details dialog will be displayed on your screen. Click once on the **Current** button.



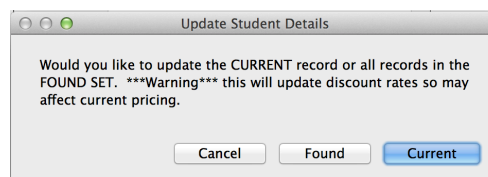
NB: Hold down the CONTROL key while you click the student icon to update a single record.

Updating Student Details for the Found Set

1. Use the **Finding a Booking** function to locate the required records.
2. When the correct bookings are displayed on your screen select **Update Student Details** from the Scripts menu.



3. The Update Student Details dialog will be displayed on your screen. Click once on the **Found** button.



Updating Session Details

When you first create a booking, information is copied from the session file into the booking. Class name, session dates, maximum size, cost, level, programme and classification are all copied to the session you are creating. This command will rewrite all session information; it should be used if you have created a new booking/s and subsequently changed instructor, level or location information.

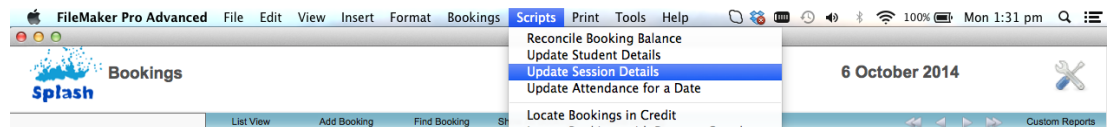
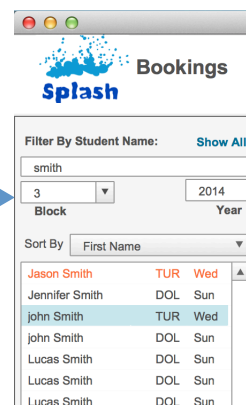
Class details can be updated for a single session or for all sessions in the found set.

Updating Session Details for the Current Record

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



3. The Booking data entry screen will be displayed, enter the criteria for the record you wish to update in the filter fields at the top of the portal list on the left of your screen.
4. Using the portal on the left of the screen, click once on booking you wish to update.
5. The portal row will be highlighted to indicate the active record. The details of the selected booking will be displayed on the right of your screen.
6. Go to the Scripts menu, select **Update Session Details**.

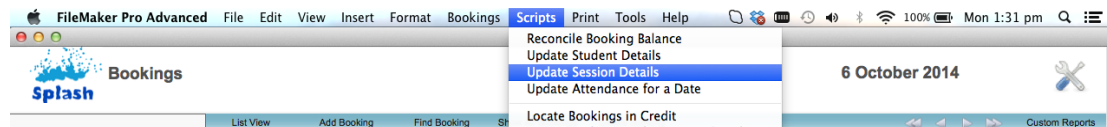


7. The Update Session Details dialog will be displayed on your screen. Click once on the **This One** button.



Updating Session Details for the Found Set

1. Use the **Finding a Booking** function to locate the required records.
2. When the correct bookings are displayed on your screen select **Update Session Details** from the Scripts menu.



3. The Update Session Details dialog will be displayed on your screen. Click once on the **OK** button.



Updating Student Goals

Goals (or progressions) will automatically be attached to each booking when a booking is made. The goals that are imported are those attached to a matching Class Level within your Preferences.

The screenshot shows the 'Splash Bookings' interface. On the left, a list of students is displayed, with 'Gareth Buchanan' selected. The main area shows the booking details for Student ID 103, Name Gareth Buchanan, Gender M, Age 10_2m, Telephone 0272222082. The booking is for Class ID dol, Class Name Dolphins, Class Level 5, Programme, Instructor Brian Thomson, Location Main Pool, Start Date 4/5/2014, End Date 5/7/2014, Start Time 2:00 PM, Weekday Sunday, Term 2, Shift Afternoon. The cost of the session is \$10.00. The right panel shows the 'Goals' tab for this booking. The student level is set to 4. The goals listed are: 'Bubble and breathe 10 metres' (Mastered, 4/04/14), 'Kick on Back 10 metres' (Mastered, 4/04/14), 'Breaststroke Kick 5 metres' (Learning, 28/04/14), 'Butterfly Arms 5 metres' (Learning, 28/04/14), 'Testing a Level with 5 Goals' (Mastered, 1/05/14), 'Testing a Level with 6 Goals' (Mastered, 28/04/14), 'Testing a Level with 7 Goals' (Introduced, 28/04/14), and 'Testing a Level with 8 Goals' (Mastered, 3/05/14). The 'Needs to work on' goal is highlighted.

Adding or Amending Goals for a Single Booking

Although goals will automatically be assigned to a booking, this will not occur if the student is working towards goals at a level which is different to default class level. This command allows you to attach an alternative set of goals to an existing booking.

1. Use the **Finding a Booking** function to locate the record you wish to update
2. Click once on the Goals tab card displayed on the right of your screen.
3. Ensure the correct Student Level is displayed, if it is not - select an alternative level from the drop-down menu provided.

This screenshot is similar to the previous one, but with a blue arrow pointing to the 'Student Level' dropdown menu, which is currently set to 4. The arrow highlights the dropdown menu, indicating that the user should click on it to select a different level if needed.

The screenshot shows the 'Splash Bookings' interface. On the left is a list of students. The main area is divided into tabs: 'List View', 'Add Booking', 'Find Booking', 'Show All Bookings', 'Delete Booking', and 'Custom Reports'. The 'Goals' tab is active, displaying a list of goals for a student. A blue arrow points to the 'Add Goals' button at the bottom right of the Goals tab.

4. Click once on the **Add Goals** button displayed in the Goals tab card.
5. The selected level goals will be displayed on your screen.

Importing Goals for the Found Set of Bookings

This command should be used when a group of bookings have been created without a corresponding set of goals (or if you have amended the student level within a number of bookings).

1. Use the **Finding a Booking** function to locate the records you wish to update.
2. Locate bookings without goals attached by placing a 0 in the Goals Attached field on the Booking Info tab card within the Find screen. Define additional criteria if required (ie. Term and Year).

The screenshot shows the 'Find' screen in the 'Splash Bookings' software. The 'Goals Attached' field is set to 0. A blue arrow points to the 'Add Goals' button in the Scripts menu.

3. When the correct bookings are displayed on your screen select **Add Goals [Found Set]** from the Scripts menu.

The screenshot shows the 'Scripts' menu in the 'Splash Bookings' software. The 'Add Goals [Found Set]' option is highlighted.

4. Splash will loop through each booking in the found set and add goals to any booking where goals are not currently defined.

NB: Goals will be carried forward from one booking to the next when a student is rebooked in a class of the same level.

Updating Progress Towards Goals

Progression towards goals can be updated in either the Diary, the Bookings file or an iPad. These instructions provide guidance for updating goals via the bookings file.

1. Use the **Finding a Booking** function to locate the records you wish to update
2. Click once on the Goals tab card displayed on the right of your screen.

The screenshot shows the 'Splash Bookings' software interface. On the left, there's a 'Filter By Student Name' list with 'Gareth Buchanan' selected. The main area is divided into three tabs: 'Attendance and Payments', 'Goals', and 'Comments'. The 'Goals' tab is active, showing a list of goals for Student Level 4. The goals are: 'Bubble and breathe 10 metres' (Mastered, 4/04/14), 'Kick on Back 10 metres' (Mastered, 4/04/14), 'Breaststroke Kick 5 metres' (Learning, 28/04/14), 'Butterfly Arms 5 metres' (Learning, 28/04/14), 'Testing a Level with 5 Goals' (Mastered, 1/05/14), 'Testing a Level with 6 Goals' (Mastered, 28/04/14), 'Testing a Level with 7 Goals' (Introduced, Date Achieved), and 'Testing a Level with 8 Goals' (Mastered, 3/05/14). The 'Breaststroke Kick 5 metres' goal is highlighted with a blue bar and the text 'Needs to work on'. Below the goals, there are fields for 'Certificate Issued', 'Assessed', 'Next Term Move to Class', 'Rollover This Booking', and 'Rebooked Next Term'.

3. There are up to three fields to be updated within each goal.

This is a close-up of the 'Goals' tab from the previous screenshot. It shows the 'Breaststroke Kick 5 metres' goal selected. The progress is set to 'Learning' with a date achieved of 28/04/14. Below the goal list, there are fields for 'Certificate Issued', 'Assessed', 'Next Term Move to Class', 'Rollover This Booking', and 'Rebooked Next Term'. The 'Breaststroke Kick 5 metres' goal is highlighted with a blue bar and the text 'Needs to work on'.

4. Select the current progress towards a goal from the drop-down menu (customise the content of the menu in your Preferences)
5. Add a **Comment** and if the goal has been achieved, click once on the **Date Achieved** field to enter today's date.

NB: Hold down the Ctrl Key while you click the date field to edit within the field.

Updating Booking Status Fields

Displayed on the goals tab card in the booking file are several additional fields which relate to the on-going status of the booking.

The screenshot shows a software interface for managing bookings. On the left, a list of students is displayed with their names and booking details (Day, Time, Day of Week). The main area contains several input fields and buttons for updating booking information. Key fields include 'Start Date', 'Start Time', 'Term', 'Weekday', 'Year', 'Shift', 'Cost of Session', 'Cost Method', 'Cost Per Session', 'Cost Unit', 'No. of Sessions', 'Total Cost', and 'Payment Required By'. On the right, there are fields for 'Testing a Level with 8 Goals', 'Date Achieved', 'Assessed', 'Next Term Move to Class', 'Rollover This Booking', and 'Rebooked Next Term'. A 'Browse' button is visible at the bottom left.

These fields determine whether the child has been assessed, whether the booking should be rolled over, whether the child should be promoted to the next level and lastly whether the booking has been rolled over to the next term. Updating these fields gives you the ability to accurately monitor who needs to be assessed, whether a booking will rollover, and whether a child is progressing to another level. Likewise you have the ability to locate students who are not rebooking.

Updating the Assessed Status

After assessing a student it is important this field is updated. Using this field correctly will enable you to locate any student that was absent during the assessment and may need to be assessed at a later date.

Updating Next Class Details

After assessing a student it will be evident which class the student needs to be booked into for the next term. In some cases the student will be progressing to the next level. If the student is progressing to another level, use this field to define which class the student should be booked into for the next term. If the child is not progressing to a higher level, leave this field blank.

Updating the Rollover Status

The rollover status is used to define which students will be automatically rebooked into the same session in the next term. When set to Yes the booking will be included in the rollover. If after assessing a student it is evident the student will be moving to another level the rollover may be set to No. This gives you the ability to locate any student who has not rolled over so a manual booking can be made. If a child exits the program mid-term, the Rollover Status will automatically be set to No.

Updating the Rebooked Status

The default setting on this field is No, however if the booking is included in the rollover this will automatically be updated to Yes after the rollover has been performed. If a student is not included in the rollover it is important you manually update this field to display Yes after you have rebooked the student into another session. Another option available on this field is NB (Not Booking). Using this field correctly will enable you to easily monitor student retention rates.

Printing a Record of Achievement

1. Use the **Finding a Booking** function to locate the required booking record.
2. Click once on the Goals tab card displayed on the right of your screen.

The screenshot shows the 'Splash' software interface. On the left is a list of students. The center pane shows details for student Gareth Buchanan, including his session information (Class ID: dol, Class Name: Dolphins, Class Level: 5, Instructor: Brian Thomson). The right pane shows the 'Goals' tab for Student Level 4, listing various swimming goals and their achievement status. A blue arrow points from the 'Print Record of Achievement' button at the bottom of the Goals tab to step 3.

3. Click once on the Print Record of Achievement button displayed at the base of the screen.
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).

The screenshot shows the report preview screen. At the top, there's a status panel with navigation icons. At the bottom right, there's a 'Continue' button. A blue arrow points from the 'Continue' button to step 5.

5. The **Print Report** dialog will be displayed on your screen.

The screenshot shows a 'Message' dialog box with the text 'Do you want to PRINT or EMAIL the Record of Achievement?'. There are three buttons: 'Cancel', 'Email', and 'Print'.

6. Click **Print** to print the report, **Email** to save the report as a PDF and email to the client, or **Cancel** to return to your original screen without printing.

The screenshot shows the 'Record of Achievement for Gareth Buchanan' report. It is titled 'Level 4 - Dolphins'. The report lists three goals:

Goal Number	Goal Description	Status	Date Achieved
1	Bubble and breathe 10 metres	Mastered	4/4/2014
2	Kick on Back 10 metres	Mastered	4/4/2014
3	Breaststroke Kick 5 metres	Learning	

Transferring a Student to Another Session

1. Use the **Finding a Booking** function to locate the record you wish to update

The screenshot shows the 'Bookings' software interface. On the left, a sidebar lists students with their names, class names, and terms. The central area displays the details for a selected student, Gareth Buchanan, including his personal information, class details (DOL, Dolphins), and session information. The right-hand panel shows attendance and payment details. A blue arrow points to the 'Session' icon in the 'Primary Contact' section, which is used to transfer the student to another session.

2. Hold down the **SHIFT** key on your keyboard and click once on the Session Icon.
3. You will be asked to confirm whether you wish to transfer the child to another session.

The dialog box is titled 'Transfer Student to Another Session'. It contains the text: 'Are you sure you want to transfer Gareth Buchanan into another session?'. There are two buttons at the bottom: 'Cancel' and 'OK'.

4. The **Select a Session** dialog will be displayed on your screen.
5. Choose a class name, term and year from the drop down menus provided and select the preferred weekdays.

The 'Select a Session' dialog box is shown. It has a title bar 'Transfer Booking' and a subtitle 'Specify search criteria for sessions to be displayed.' Below the subtitle, there are several dropdown menus and checkboxes for search criteria: 'Class Name' (DOL), 'Instructor' (All), 'Term' (2), 'Year' (2014), and checkboxes for 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Sunday' (which is checked). Below these criteria, there is a table of sessions:

Class Name	Day	Time	Instructor	Spaces
DOL	Sun	9:00AM	Barbara Smith	4
DOL	Sun	9:30AM	Brian Thomson	1
DOL	Sun	9:30AM	Barbara Smith	3
DOL	Sun	1:30PM	Brian Thomson	3
DOL	Sun	2:00PM	Brian Thomson	3

At the bottom left of the dialog box, there is a 'Cancel' button.

6. A list of all sessions matching the criteria you have entered will be displayed on your screen.
7. Click once on the line, which contains the session you wish to move the student into.

NB: Place your cursor over the desired line (without clicking) to view a list of students currently booked into the session.

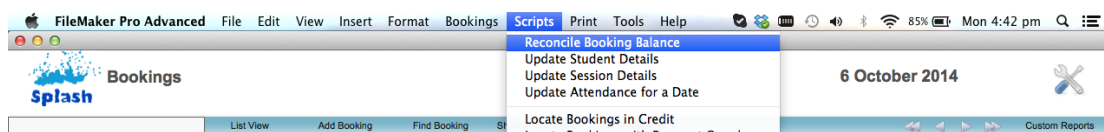
- After clicking on the required Session you will be returned to the Booking Details screen.
- The transfer notes will be updated to show the session the student's previous booking information.

The screenshot displays the 'Splash Bookings' application. On the left, there's a 'Filter By Student Name' section with a list of students. The main area shows the profile for 'Gareth Buchanan' (Student ID 103). To the right, the 'Booking Info' section shows details for a 'dol' session (Class ID 1843), including the instructor 'Brian Thomson', location 'Main Pool', and dates '4/5/2014' to '5/7/2014'. The 'Transfer Notes' section at the bottom right contains the text: 'Previously booked in Dolphins on Sunday at 9:30 AM with Brian Thomson, moved on 14/6/2014.' A blue arrow points from this text to the 'Transfer Notes' section header.

Reconcile the Balance Due on Bookings

If you are unsure about the accuracy of the financial reporting this script can be run. Reconcile Balance Due forces Splash to relook for any payments made towards the found set of bookings. During the script Splash will reconcile all payments to ensure the funds have been allocated to each booking correctly.

- Use the **Finding a Booking** function to locate the records you wish to reconcile.
- Select **Reconcile Booking Balance** from the Scripts menu.

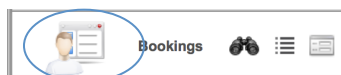


- Splash will step through all of the records in the found set. It will calculate payments received and update the balance due on all bookings in the found set.

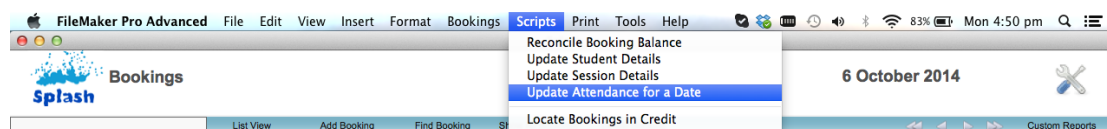
Updating Attendance for Multiple Bookings

This command can be used to update attendance fields for all bookings on a specified date. It is commonly used to define a selected date as a Public Holiday however can be used on a daily basis to update the attendance for all students. Many schools enter non-attendance throughout the day and then use this function at the end of the day to mark all other students as attended:

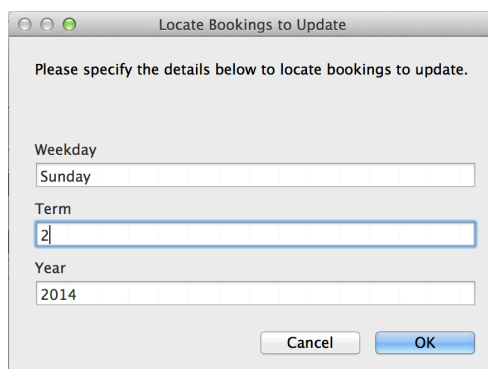
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



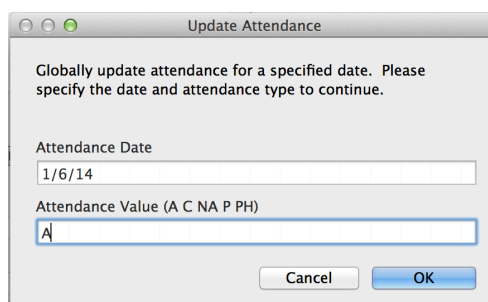
3. Select **Update Attendance for a Date** from the Scripts menu.



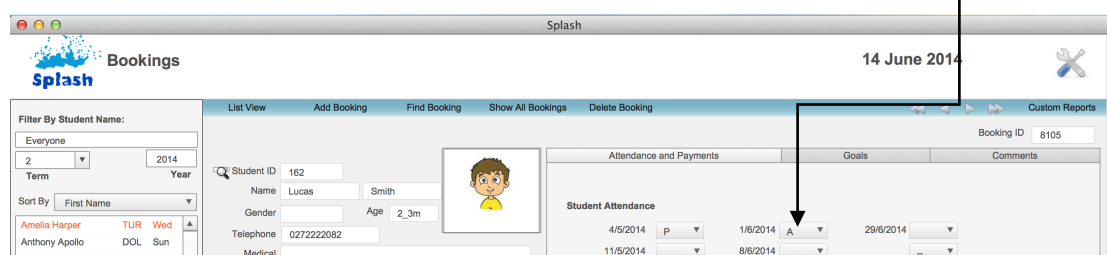
4. The **Locate Bookings to Update** dialog will be displayed on your screen. You will be requested to confirm the Weekday, Term, and Year for the bookings to be updated.



5. Enter the required day, term and year and click OK. Splash uses this information to locate the bookings to be updated. If no bookings are located the script will stop here.
6. If bookings are located the **Update Attendance** dialog box will be displayed on your screen. Enter the date you wish to update and define the attendance code you wish to enter for the selected date.



7. Click OK to update the selected records.



8. Splash will now step through all records in the found set. If it finds a booking with the specified date displayed in the attendance screen, it will determine whether or not the attendance field needs to be updated. The field will only be updated in the record if the corresponding attendance field is currently empty.

Exiting a Student from the Session

Exiting a student booking releases a space in the class so another student can be booked into the same class. If a child ceases swimming mid term you have two options available for removing the child from the session. You can either delete the booking or exit the student from the class. You can however, only delete a booking if no payment has been made towards the booking. We recommend exiting a child if they have entered the water at any time during the selected term.

An exit should be used when you wish to keep a record of the selected booking on the student file but remove the child from the class.

1. Use the **Finding a Booking** function to locate the record you wish to update.
2. Click on the **Student Exited From Class** field to display the exit dialog for the required student.

The screenshot shows the 'Splash Bookings' software interface. On the left is a list of students with columns for Name, Session, and Day. The main area displays details for a student named Lucas Smith, including their ID, name, age, and contact information. A 'Student Attendance' table shows dates from 4/5/2014 to 22/6/2014. Below this is a 'Cost of Booking' section with fields for Initial Cost, Discount Rate, and Payments Received. A modal dialog box titled 'Enter Exit Reason' is open in the foreground, showing the student's name 'Lucas Smith' and a dropdown menu for 'Reason for Exit'. The dialog also has an 'Exit Date' field and 'Cancel' and 'Done' buttons.

3. Update the **Reason for Exit** and confirm the **Exit Date** fields then click the **Continue** button. A booking is not considered exited unless a reason has been entered.

This is a close-up of the 'Enter Exit Reason' dialog box. The 'Reason for Exit' dropdown menu is open, showing a list of options: Financial, Goals Met, Illness, Injury, Loss of Interest, Other, and Other Commitments. The 'Exit Date' field is visible below the dropdown. The 'Done' button is highlighted with a green checkmark.

4. If the exit date has passed a cross will appear in the Exit box. If the exit date is the current or a future date the cross will not appear until after the date has passed.

NB: An additional dialog box will be displayed during the exit process if money is still due on the selected booking.

NB: An exited booking is not included in the rollover; the rollover booking field will be set to No.

NB: Exited bookings will remain on the student file, however, they will appear dimmed on the screen. They will not print on an instructor report or appear on the iPad view.

NB: Update the list of exit options in the Preferences module of Splash.

Reactivating an Exited Booking

1. Use the **Finding a Booking** function to locate the booking you wish to reactivate.
2. The Booking Info tab card will show a cross in the Student Exited from Class field.

3. Click on the cross in the **Student Exited From Class** field.
4. You will be asked whether you want to reactivate the current booking.

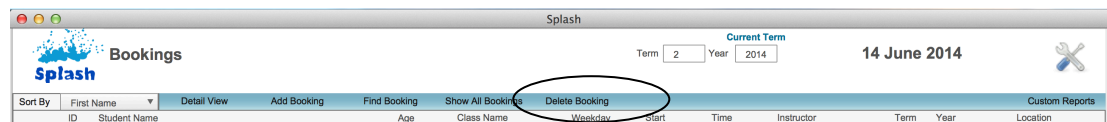
NB: Any funds written off during the exit process will be reapplied to the booking. The rollover booking field will be reset to match the student default.

Deleting a Booking Record

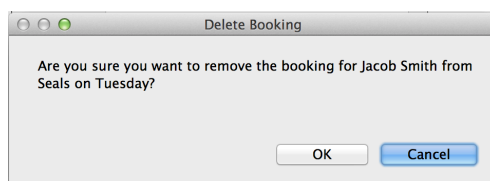
Booking records can be deleted from the Booking details screen, the Booking list view or the diary.

Deleting a Booking from List View

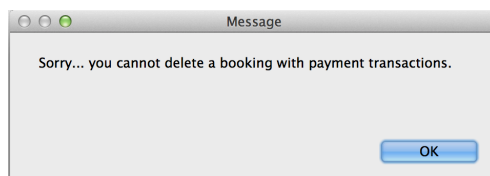
1. Ensure the appropriate Booking record is displayed within the list on your screen.



2. Click once on the row containing the booking you wish to delete.
3. Click once on the **Delete Booking** button.
4. You will be asked to confirm you wish to delete the selected booking.

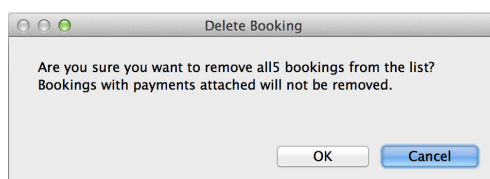


NB: You cannot delete a booking which has received payments.

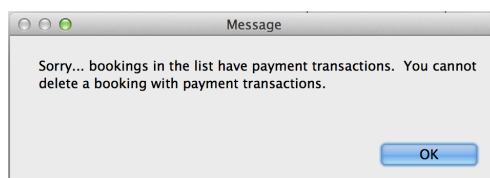


Deleting a Group of Bookings

1. Use the **Find Booking** button to locate the booking records you wish to delete.
2. A list of bookings will be displayed on your screen.
3. Select **Delete All Found Bookings** from the Bookings menu.
4. You will be asked to confirm you wish to delete the selected bookings.



NB: You cannot delete the found set of bookings if the current selection contains ANY bookings with payments attached.



Defining Current Term Swimmers as Active

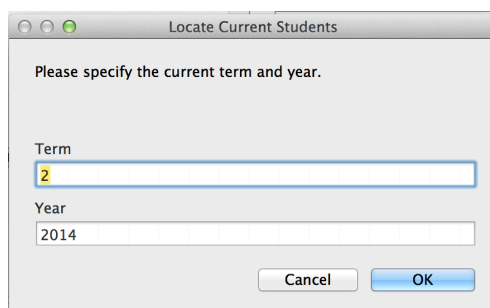
All student and family files can be defined as either active or inactive. During normal operation Splash will attempt to maintain the status of each record and will automatically set the status to Active whenever a booking is made. Splash however has difficulty changing the status of a record to inactive in some situations.

Use this command to update the status of all student and family files for anyone booked in a specified term/block.

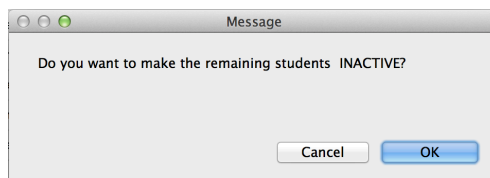
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



3. Select **Set Current Term Swimmers to Active** from the Scripts menu.
4. The **Locate Current Students** dialog will be displayed on your screen.
5. Enter the current Term and Year and click OK. Students with a booking in the selected term and year will be set to active.

A screenshot of the 'Locate Current Students' dialog box. The title bar says 'Locate Current Students'. The main text says 'Please specify the current term and year.' There are two input fields: 'Term' with the value '2' and 'Year' with the value '2014'. At the bottom right are 'Cancel' and 'OK' buttons.

6. You will be asked whether the remaining students should be set to inactive.

A screenshot of a 'Message' dialog box. The title bar says 'Message'. The main text says 'Do you want to make the remaining students INACTIVE?'. At the bottom right are 'Cancel' and 'OK' buttons.

7. Splash will now attempt to do the same with the family record for each active student. A dialog will be displayed asking if you wish to set the remaining families to Inactive. If you select OK, Splash will locate all the families for the active students set them to active and then set the remaining families to inactive.

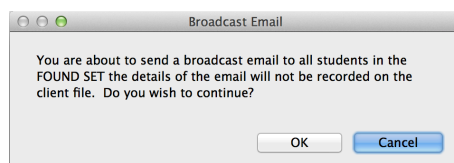
A screenshot of a 'Message' dialog box. The title bar says 'Message'. The main text says 'Do you want to make the remaining families INACTIVE?'. At the bottom right are 'Cancel' and 'OK' buttons.

Sending a Broadcast Email

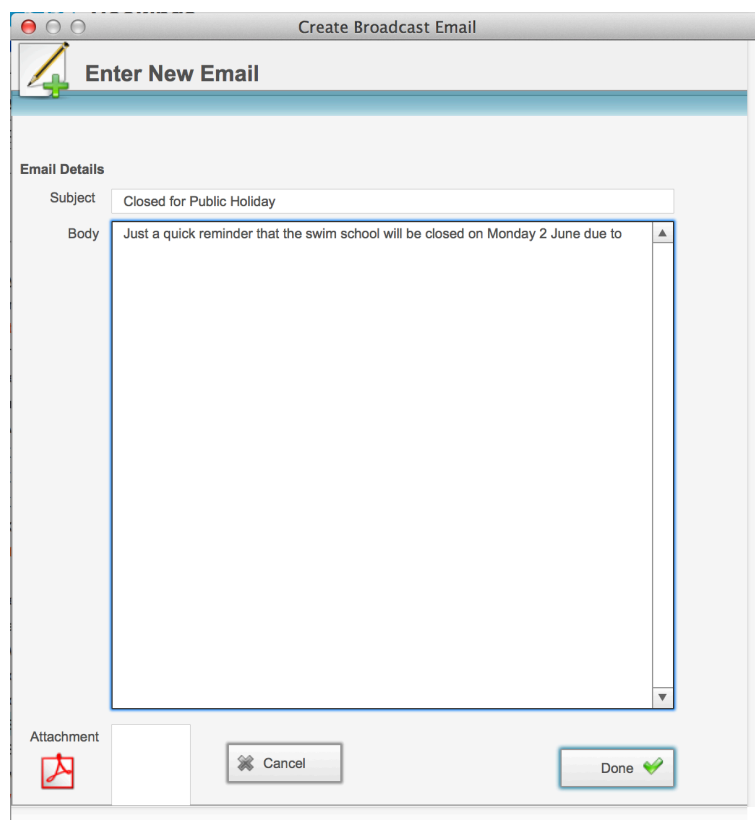
A broadcast email is a single email sent to multiple addresses. An email sent in this way will not be recorded on the family file.

This feature works in conjunction with the email application installed on your computer or messages can be sent directly to a nominated smtp server.

1. Use the **Finding a Booking** function to locate the families you wish to send a message to. Locate only families with an email address by placing an asterisk (*) in the email field along with any other find criteria.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Send Broadcast Email** from the Scripts Menu.
4. A dialog will be displayed on your screen warning that you are about to send multiple email messages. Click **OK** to continue or Cancel to exit the script without sending a message.



5. The **Enter Broadcast Email** dialog will be displayed on your screen.



6. Enter the message you wish to send and attach a document if required.
7. Click the **Done** button.
8. The message will be sent as soon as you click Done.

NB: You can view the messages that have been sent by looking in the Sent Items folder of your email application.

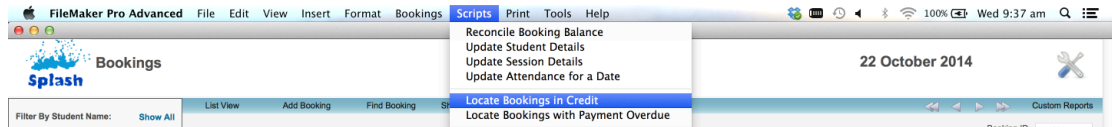
Locate Bookings in Credit

Use this command to find any bookings that have been over paid. Credits can then be applied to another booking if they are located.

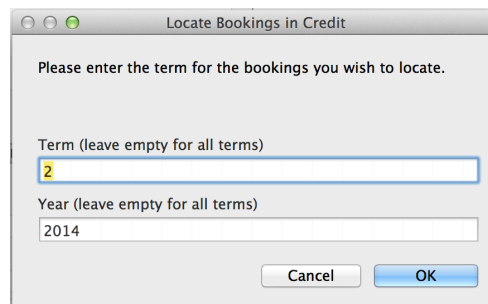
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



3. Select **Locate Bookings in Credit** from the Scripts menu.



4. The Locate Bookings in Credit dialog will be displayed on your screen.



5. Enter the required term and year (or leave blank for all credits) and click OK.
6. A list of bookings in credit will be displayed on your screen. Each booking will be displayed with a negative symbol in the payment status column.

Splash

Bookings

Block

3

Year

2014

Current Block

16 October 2014

Sort By

First Name

Detail View

Add Booking

Find Booking

Show All Bookings

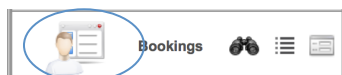
Delete Booking

Custom Reports

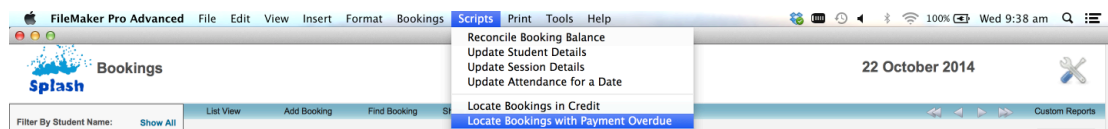
ID	Student Name	Age	Class Name	Weekday	Start	Time	Instructor	Block	Year	Location
160	Paula Schwass	8_5m	Dolphins	Tuesday	8/7/2014	2:00PM	Barbara Smith	3	2014	Main Pool
109	JOSEPH zimmerman	14_5m	Seals	Monday	9/7/2014	10:30AM	Barbara Smith	3	2014	Main Pool
69	Bridgette Robinson	14_0m	Turtles	Wednesday	9/7/2014	10:30AM	Barbara Smith	3	2014	Learners Pool
71	Georgia Taylor	9_2m	Seals	Wednesday	9/7/2014	10:30AM	Barbara Smith	3	2014	Main Pool

Locate Bookings with Payment Overdue

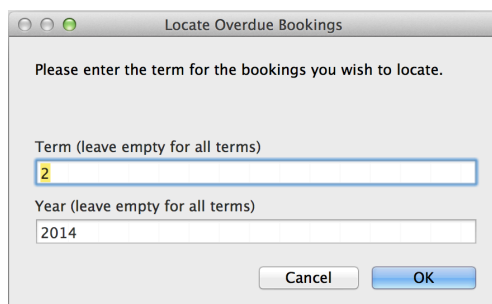
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



3. Select **Locate Bookings with Payment Overdue** from the Scripts menu.



4. The Locate Overdue Bookings dialog will be displayed on your screen.




Please enter the term for the bookings you wish to locate.

Term (leave empty for all terms)
2

Year (leave empty for all terms)
2014

Cancel OK

5. Enter the required term and year (or leave blank for all outstanding accounts) and click OK.
6. A list of all unpaid bookings will be displayed on your screen. The payment status icon will signify part-paid or unpaid bookings. Part-paid bookings are displayed with a cross; bookings with no payment processed will be displayed with a circle.



Bookings

Splash

Term


2





















Year

2014

Current Term

14 June 2014



Sort By	First Name	Detail View	Add Booking	Find Booking	Show All Bookings	Delete Booking	Custom Reports					
ID	Student Name	Age	Class Name	Weekday	Start	Time	Instructor	Term	Year	Location		
 85	Corey Morrison	 12_2m			Seals	Sunday	4/5/2014	1:00PM	Brian Thomson	2	2014	Main Pool
 2036	Peter Williamson	 0_4m			Seals	Wednesday	7/5/2014	9:30AM	Barbara Smith	2	2014	Main Pool
 115	Jennifer Smith	 4_1m			Turtles	Wednesday	4/6/2014	9:00AM	Lynda Wightman	2	2014	Learners Pool
 2042	Jessica Hargreaves	 12_9m			Turtles	Wednesday	30/4/2014	9:00AM	Lynda Wightman	2	2014	Learners Pool
 97	Gaylene Patterson	 13_8m			Dolphins	Wednesday	11/6/2014	2:00PM	Brian Thomson	2	2014	Main Pool

NB: You can now use this list to send reminder notices via email or sms.

Sending Booking Related SMS Messages

SMS messages can be sent to individual families or all families in the found set. This command will only be successful if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

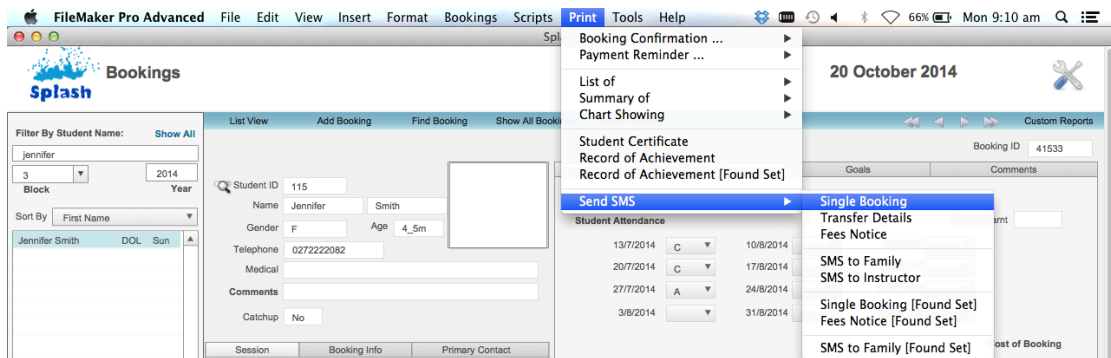
All of the Send SMS commands described below are available on either the Print or the Scripts menu.

1. Use the **Finding a Booking** function to locate the booking record you wish to send a message for.

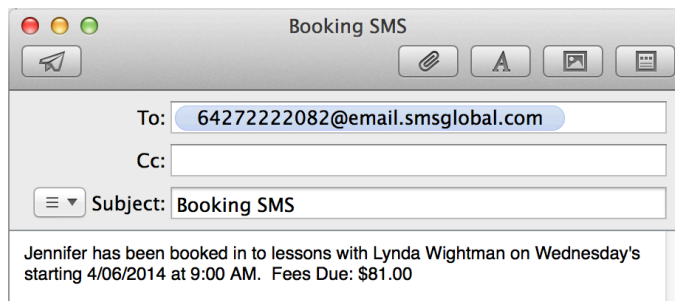
Sending a Single Booking SMS

Use the command to send a brief booking confirmation to the family. The content of this message will be customised to display details of the selected booking. Customise the content of the message using the Document Template module within Preferences.

2. Follow step 1 described above to locate the booking you wish to send a message about.
3. Select **Send SMS** from the Print menu. Choose Single Booking from the pop-out menu displayed.



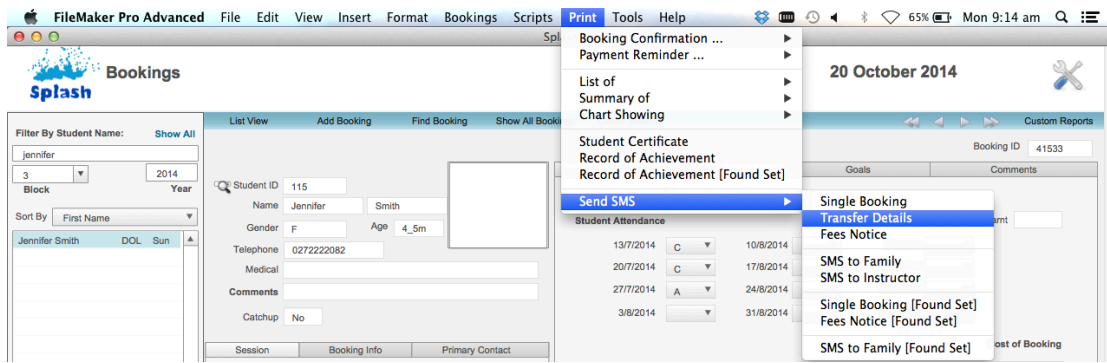
4. The Booking SMS will be generated and sent.



Sending a Transfer Notice SMS

Use the command to send a brief transfer confirmation to the family. The content of this message will be customised to display details of the selected booking. Customise the content of the message using the Document Template module within Preferences.

1. Follow step 1 described above to locate the booking you wish to send a message about.
2. Select **Send SMS** from the Print menu. Choose Transfer Details from the pop-out menu displayed.

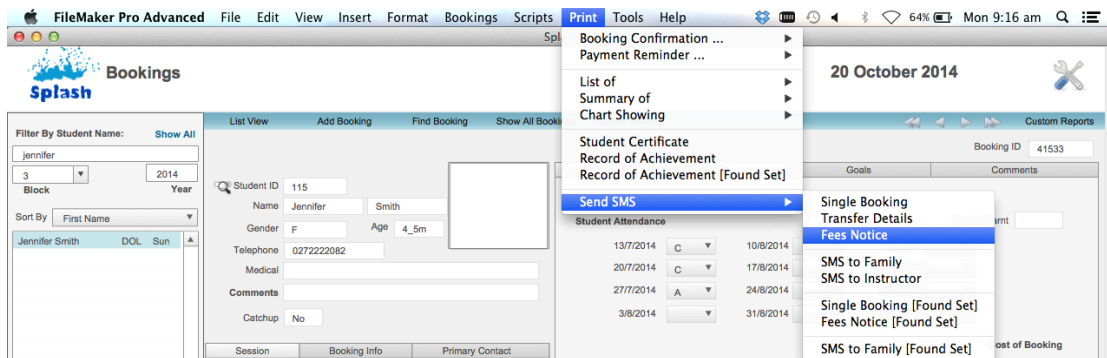


3. The Transfer SMS will be generated and sent.

Sending a Fees Notice SMS

Use the command to send a brief reminder of fees due. The content of this message will be customised to display the detail of the selected booking. Customise the content of the message using the Document Template module within Preferences.

1. Follow step 1 described above to locate the booking you wish to send a message about.
2. Select **Send SMS** from the Print menu. Choose Fees Notice from the pop-out menu displayed.

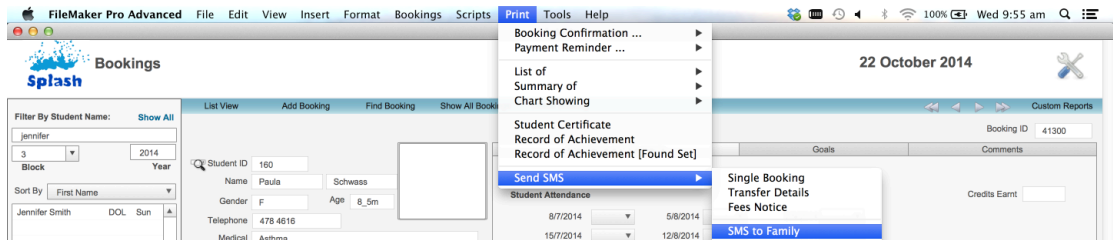


3. The Fee Notice SMS will be generated and sent.

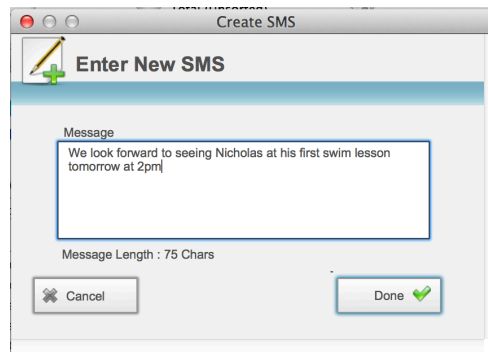
Sending a SMS to the Family (from Menu)

Use this command to send a single SMS message to the family of the selected booking.

1. Follow step 1 described above to locate a booking for the required family.
2. Select **Send SMS** from the Print menu. Choose **SMS to Family** from the pop-out menu displayed.



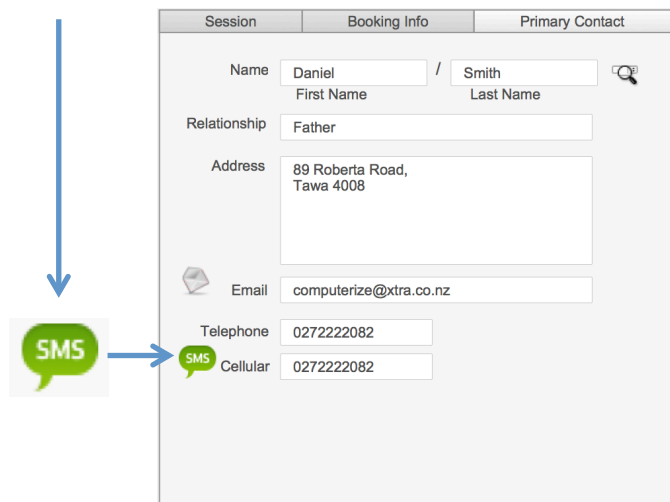
3. The **Enter New SMS** dialog will be displayed on your screen.



4. Enter the message you wish to send.
5. Click the **Done** button to send your message and return to the family entry screen.

Sending a SMS to the Family (from Icon)

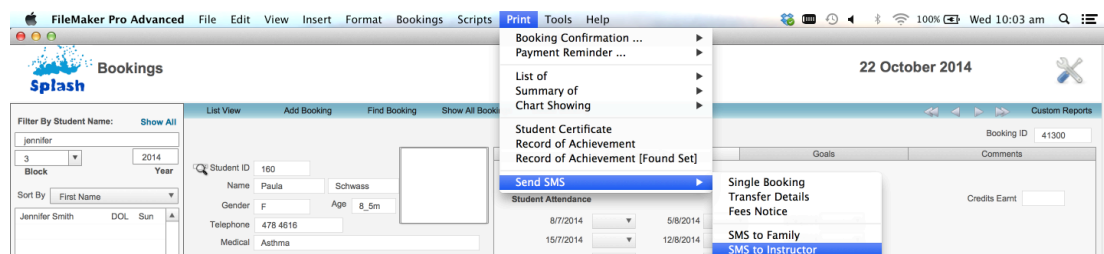
An alternative to sending a SMS to the family as described above is to initiate the message from a desktop icon rather than the menu system. Simply locate a booking for the required family and click once on the SMS button displayed to the left of the Primary Contact telephone number.



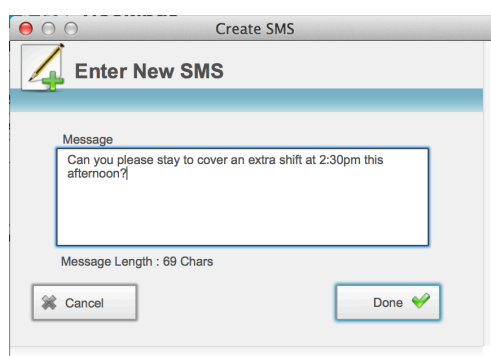
Sending a SMS to the Instructor (from Menu)

Use this command to send a single SMS message to the instructor assigned to the selected booking.

1. Follow step 1 described above to locate a booking for the selected instructor.
2. Select **Send SMS** from the Print menu. Choose **SMS to Instructor** from the pop-out menu displayed.



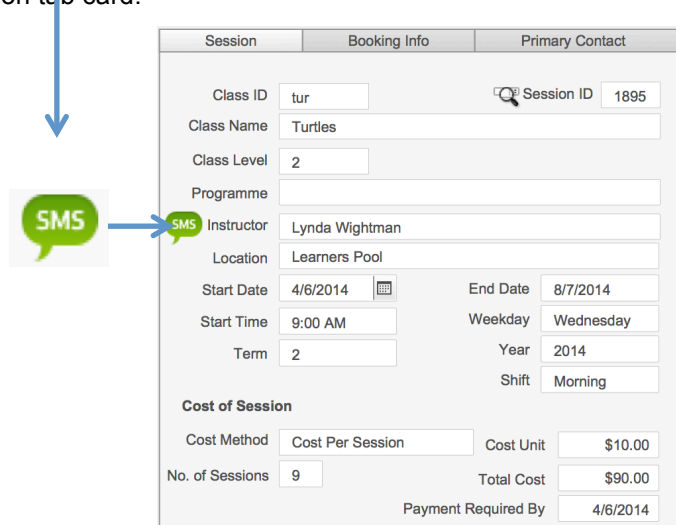
3. The **Enter New SMS** dialog will be displayed on your screen.



4. Enter the message you wish to send.
5. Click the **Done** button to send your message and return to the booking screen.

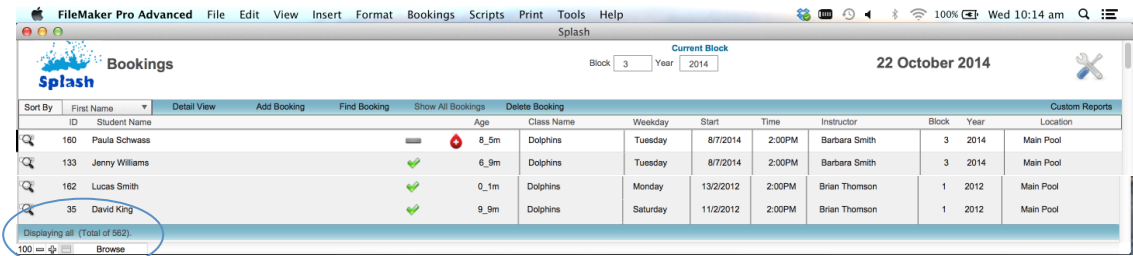
Sending a SMS to the Instructor (from Icon)

An alternative to sending a SMS to the instructor as described above is to initiate it from a desktop icon rather than the menu system. Simply locate any booking for the required instructor, and then click once on the SMS button displayed to the left of the Instructor name in the session tab card.



Sending SMS Messages for Found Records

As mentioned above, SMS messages can be sent to individual families or alternatively to all families in the found set of records. This command outlines the process for sending SMS messages to every record in the found set.



The size of the found set is displayed on the lower left corner of the list view screen.

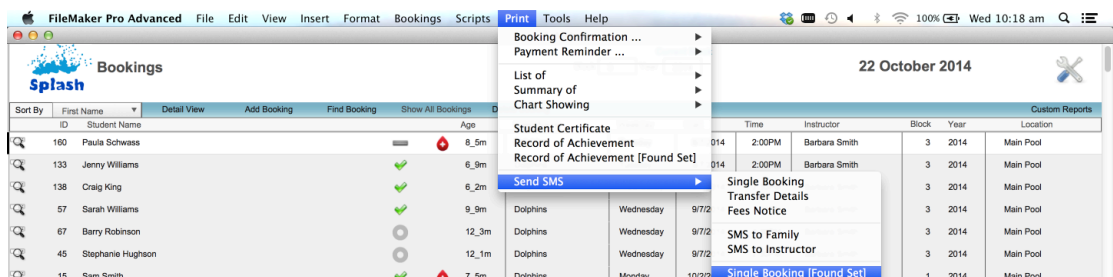
This command will only be successful if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

1. Use the **Finding a Booking** function to locate the booking records you wish to send messages for.

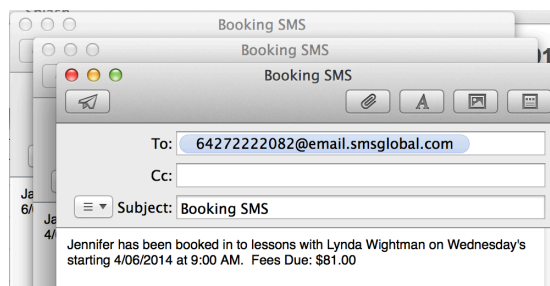
Sending a Booking SMS to the Found Set of Bookings

Use this command to send a brief booking confirmation for all bookings in the found set. The content of this message will be customised to display details of each booking. Customise the content of the message using the Document Template module within Preferences.

2. Follow step 1 described above to locate the bookings you wish to send a message about.
3. Select **Send SMS** from the Print menu. Choose **Single Booking [Found Set]** from the pop-out menu displayed.



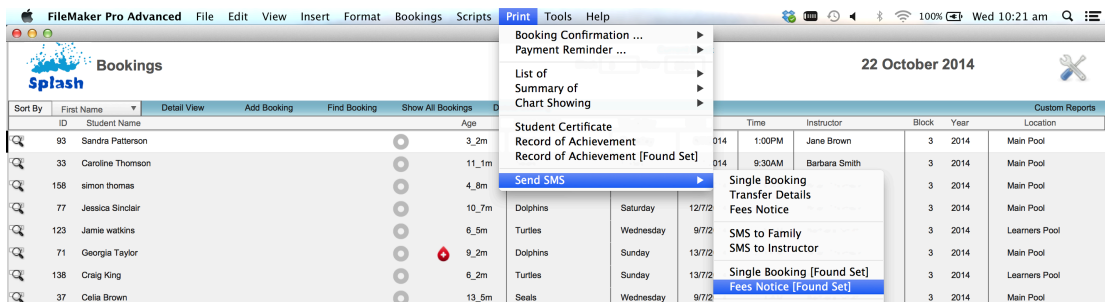
4. Each Booking SMS messages will be generated and sent.



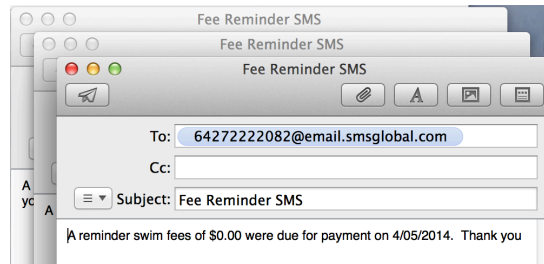
Sending a Fees Notice SMS to the Found Set of Bookings

Use this command to send a brief reminder of fees due for all bookings in the found set. The content of this message will be customised to display the detail of each booking. Customise the content of the message using the Document Template module within Preferences.

1. Follow step 1 described above to locate the booking you wish to send a message about.
2. Select **Send SMS** from the Print menu. Choose **Fees Notice [Found Set]** from the pop-out menu displayed.



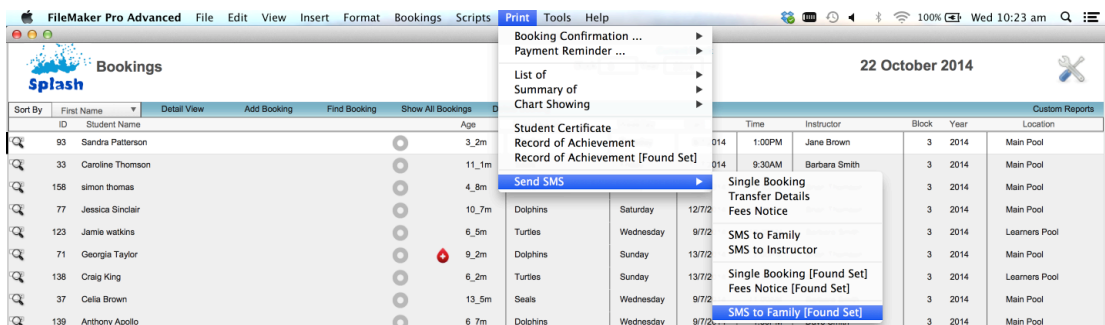
3. The Fee Notice SMS will be generated and sent.



Sending a SMS to the Family (from Menu)

Use this command to send a single SMS message to all families within the found set of bookings.

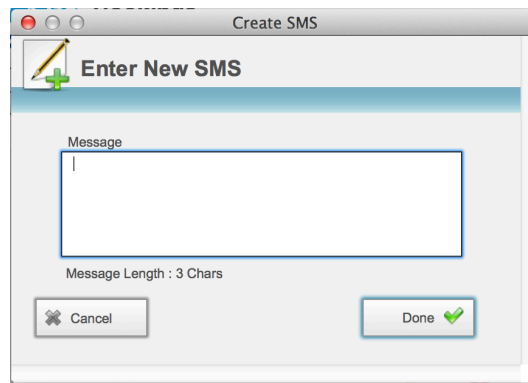
1. Follow step 1 described above to locate a booking for the selected family.
2. Select **Send SMS** from the Print menu. Choose **SMS to Family [Found Set]** from the pop-out menu displayed.



3. The **Send SMS Message** dialog will be displayed on your screen. You will be asked to confirm all families in the found set of bookings should receive a message. Click OK to continue or Cancel to exit without sending any messages.



4. The **Enter New SMS** dialog will be displayed on your screen.



5. Enter the message you wish to send.
6. Click the **Done** button to send your messages and return to the booking screen.

Rollover Current Term Bookings

Performing a rollover of bookings will create new bookings duplicating the bookings of a selected term. Splash will identify all the bookings in the selected term and make a copy of them in a future term.

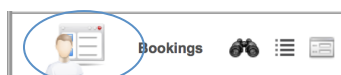
This command enables you to quickly rebook all or some of your existing students into the same session for the coming block. This function will only be successful if you have rolled over the corresponding sessions (see Rollover Sessions – Sessions Module).

Bookings will only be rolled over if Rollover Booking in the booking record is set to **Yes**

NB: Confirm how many bookings are going to rollover by performing a find which contains the original term/block name and year, also enter **Yes** in the Rollover Booking field.

NB: Check which bookings will not be included in the rollover by performing a find which contains the original term/block name and year, along with **No** in the Rollover Booking field.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon

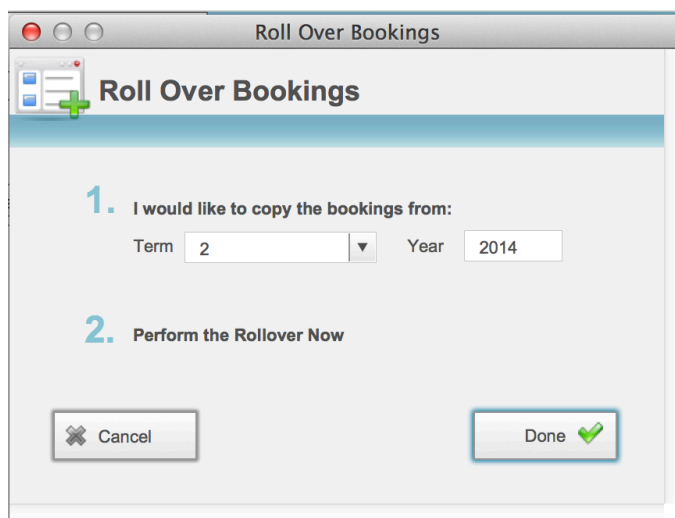


3. Go to the **Scripts** menu to select **Rollover Bookings to Next Term**.

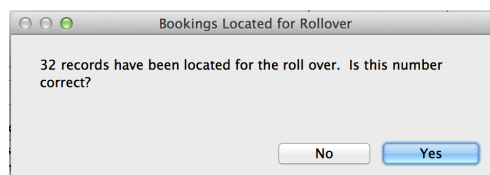
4. A message dialog will be displayed on your screen. You will be asked to confirm that the sessions have been rolled over – remember this process will fail if you have not rolled over the corresponding sessions.



5. Click OK if the sessions have been created, or Cancel to exit the rollover process.
6. If you clicked OK (above) the **Rollover Bookings** dialog box will be displayed on your screen.
7. You are now required to define the term/block and year of the bookings you want to be copied. Click once in the Term field to display a list of available terms/blocks. Enter the year number and click **Done**.

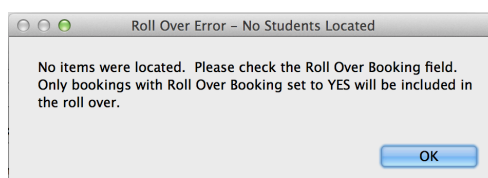


5. Splash will display a dialog that contains the number of records it has located for the rollover. Click Yes if this number matches the number of bookings you expect to rollover.



6. If you clicked Yes (above) the new bookings will be displayed on your screen.

NB: If no bookings are located for the rollover, the following message will be displayed and the script will end.



NB: After completing the rollover use the transfer a booking button to move any students who may be progressing to a higher level. When all amendments have been made simply forward a confirmation letter to all families which contains the booking information along with the cost of the fees due for the future term.

Locate All Families Bookings with a Balance

Use this command to locate all the outstanding accounts for a selected family.

1. Use the **Finding a Booking** function to locate the any booking for the required family.
2. Click once on the **Locate Family's Bookings with a Balance** button displayed on the lower right corner of your screen.

The screenshot shows the 'Find Booking' screen in the Splash Bookings software. The interface is divided into several sections:

- Filter By Student Name:** A dropdown menu set to 'Everyone' and a 'Term' dropdown set to '2' for the year '2014'.
- Sort By:** A dropdown menu set to 'First Name'.
- Student List:** A list of students with their names, initials, and days. The student 'Sam Smith' is highlighted.
- Booking Details:** A form for entering booking information, including Name (Sam Smith), Gender (M), Age (7_7m), Telephone (0272222082), Medical (Asthma), and Comments.
- Session Information:** A section for entering session details, including Class ID (sea), Class Name (Seals), Class Level (3), Programme (School Age), Instructor (Brian Thomson), Location (Main Pool), Start Date (9/7/2014), End Date (28/9/2014), Start Time (1:00 PM), Weekday (Wednesday), Term (3), Year (2014), Shift (Morning), Cost of Session, Cost Method, Cost Per Session (\$7.50), No. of Sessions (12), Total Cost (\$90.00), and Payment Required By (9/7/2014).
- Attendance and Payments:** A section for tracking attendance and payments, including a table for Student Attendance, a Cost of Booking summary, and a Payments Received table.
- Locate Family's Bookings with a Balance:** A button in the bottom right corner of the right-hand panel, highlighted by a blue arrow.

3. All bookings with an outstanding balance for the selected family will be displayed on your screen.

ID	Student Name	Age	Class Name	Weekday	Start	Time	Instructor	Term	Year	Location
15	Sam Smith	7_7m	Seals	Wednesday	9/7/2014	1:00PM	Brian Thomson	3	2014	Main Pool
15	Sam Smith	7_7m	Seals	Wednesday	15/10/201	1:00PM	Barbara Smith	4	2014	Main Pool
162	Lucas Smith	2_3m	Dolphins	Sunday	19/10/201	2:00PM	Brian Thomson	4	2014	Main Pool
15	Sam Smith	7_7m	Dolphins	Tuesday	6/1/2015	9:30AM	Barbara Smith	1	2015	Main Pool
15	Sam Smith	7_7m	Dolphins	Wednesday	7/1/2015	9:30AM	Brian Thomson	1	2015	Main Pool
15	Sam Smith	7_7m	Dolphins	Wednesday	7/1/2015	9:30AM	Brian Thomson	1	2015	Main Pool
17	Nicholas Smith	7_7m	Seals	Wednesday	7/1/2015	1:00PM	Barbara Smith	1	2015	Main Pool
17	Nicholas Smith	7_7m	Seals	Wednesday	7/1/2015	1:00PM	Barbara Smith	1	2015	Main Pool

NB: While the list is displayed on your screen, create a PDF to email the selected family by choosing **List of ... Bookings \$ Balances** from the **Print Menu**.

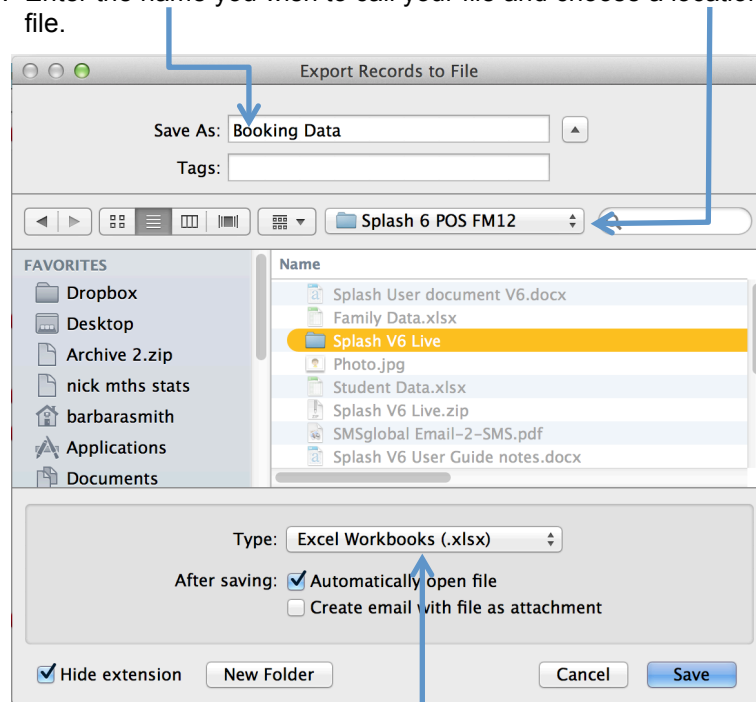
Bookings - Current Balance of Booking						Balance
Balance as at 22/10/2014						
Smith (Barbara Smith)					0272222082	\$367.00
Jacob Smith	Seals	Mon	BS	Block: 1A	2014	\$70.00
Jacob Smith	Seals	Tue	BS	Block: 2	2014	\$81.00
Lucas Smith	Dolphins	Sun	BS	Block: 3	2014	\$108.00
Lucas Smith	Dolphins	Sun	BS	Block: 3	2014	\$108.00
Total Due as at 22/10/2014						\$367.00

Exporting Booking Data

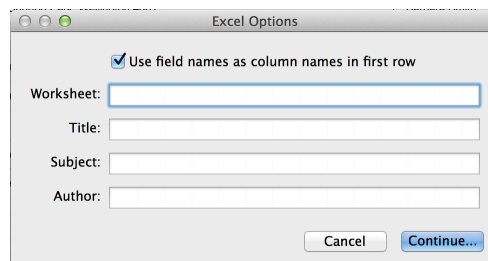
You can export Splash data to a new file and then open it in another application. For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

Exporting Records to Excel

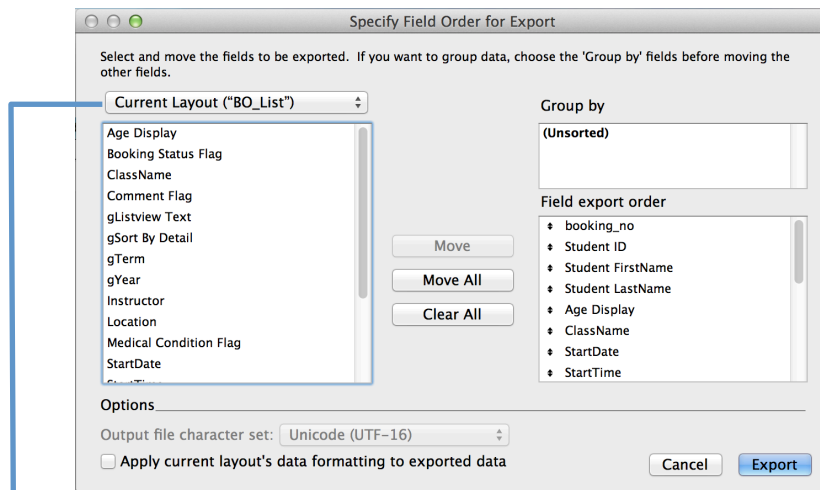
1. Use the **Finding a Booking** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Booking Data** from the **Scripts** menu.
4. The **Export Records to File** dialog will be displayed on your screen.
5. Enter the name you wish to call your file and choose a location to store the file.



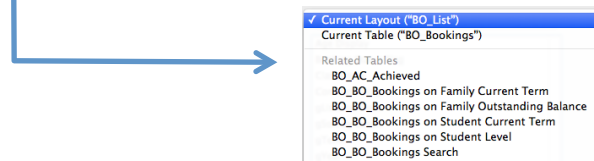
6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



8. The **Specify Field Order for Export** dialog will be displayed on your screen. A default set of export fields will be displayed on the right of the dialog. Use this dialog to indicate any additional fields and their order.
9. All fields displayed in the **Field Export Order** list will be exported.
10. To move a field to the **Field Export Order** simply double-click the field name on the left of the screen.



11. To include a related field choose the name of the related table from the list in the upper left of the dialog, then double-click the required field.



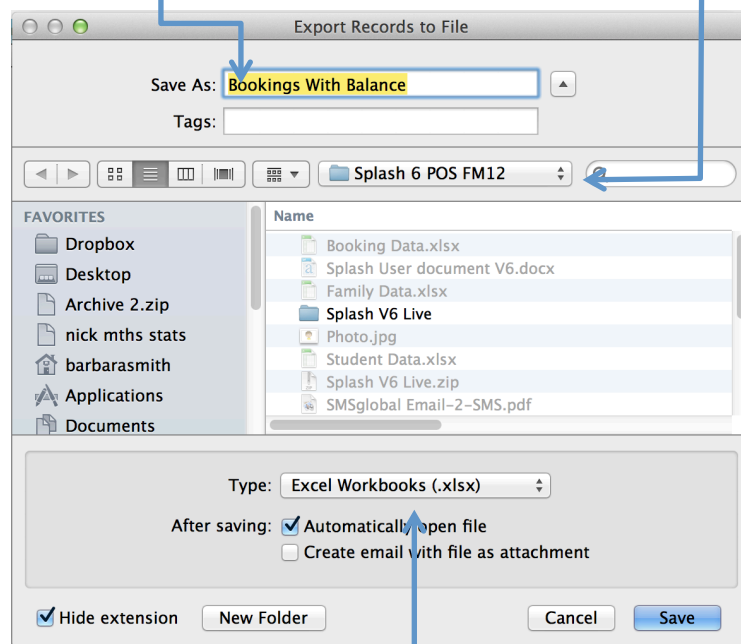
12. When all the required fields are displayed in the Field Export Order list click the **Export** button.

13. The Excel file will be saved to your computer ready for use.

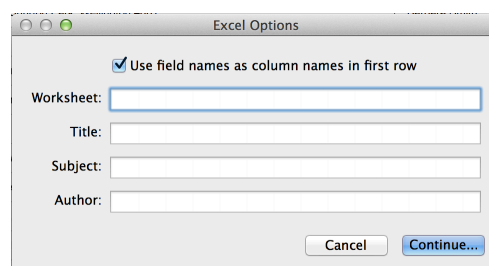
booking_no	Student ID	Student FirstName	Student LastName	Age Display	ClassName	StartDate	StartTime	Term
8089	166	William	Smith	4, 4m	Dolphins	04/05/2014	09:30:00	
8090	65	William	Jessop	12, 10m	Seals	04/05/2014	11:00:00	
8091	159	Tony	Zelish	8, 3m	Turtles	04/05/2014	09:30:00	
8092	158	simon	thomas	4, 5m	Seals	09/05/2014	10:30:00	
8094	93	Sandra	Patterson	2, 11m	Sharks	06/05/2014	13:00:00	
8095	15	Sam	Smith	7, 7m	Dolphins	06/05/2014	09:30:00	
8098	31	Sally	Anderson	11, 0m	Turtles	04/05/2014	09:00:00	
8101	160	Paula	Schwass	8, 2m	Dolphins	06/05/2014	14:00:00	
8104	151	Mary	Brown	4, 5m	Seals	04/05/2014	09:30:00	

Export Booking Balance

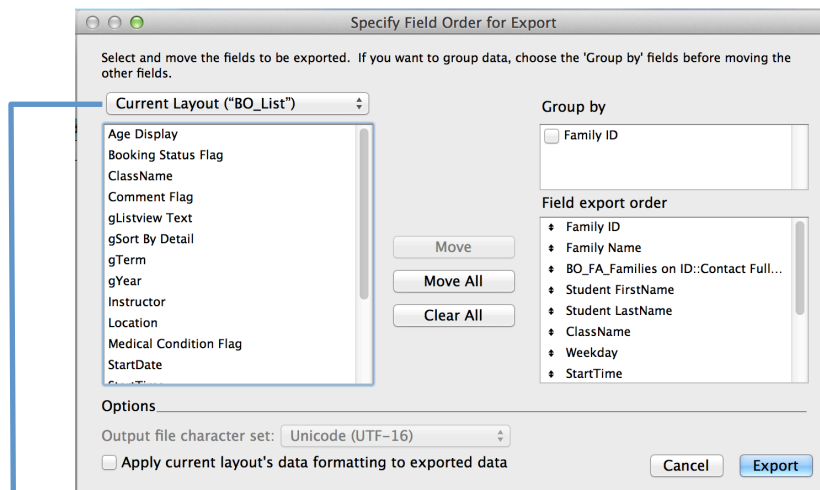
1. Use the **Finding a Booking** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Booking Data** from the **Scripts** menu.
4. The **Export Records to File** dialog will be displayed on your screen.
5. Enter the name you wish to call your file and choose a location to store the file.



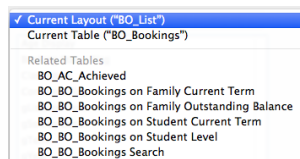
6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



8. The **Specify Field Order for Export** dialog will be displayed on your screen. A default set of export fields will be displayed on the right of the dialog. Use this dialog to indicate any additional fields and their order.
9. All fields displayed in the **Field Export Order** list will be exported.
10. To move a field to the **Field Export Order** simply double-click the field name on the left of the screen.



11.To include a related field choose the name of the related table from the list in the upper left of the dialog, then double-click the required field.



12.When all the required fields are displayed in the Field Export Order list click the **Export** button.

13.The Excel file will be saved to your computer ready for use.

	A	B	C	D	E	F	G	H	I	J
	Family ID	Family Name	A_Families on ID::Contact Full...	Student FirstName	Student LastName	ClassName	Weekday	StartTime	Booking Status	BO_FA_Families on ID::Contact Full...
1	2	Smith	Barbara Smith	Sam	Smith	Seals	Wednesday	13:00:00	Booking Made	barbaras@xt
2	2	Smith	Barbara Smith	Sam	Smith	Seals	Wednesday	13:00:00	Booking Made	barbaras@xt
3	2	Smith	Barbara Smith	Lucas	Smith	Dolphins	Sunday	14:00:00	Booking Made	barbaras@xt
4	2	Smith	Barbara Smith	Jacob	Smith	Seals	Monday	09:00:00	Booking Made	barbaras@xt
5	2	Smith	Barbara Smith	Sam	Smith	Dolphins	Wednesday	09:30:00	Booking Made	barbaras@xt
6	2	Smith	Barbara Smith	Sam	Smith	Seals	Wednesday	13:00:00	Booking Made	barbaras@xt
7	2	Smith	Barbara Smith	Lucas	Smith	Dolphins	Sunday	14:00:00	Booking Made	barbaras@xt
8	2	Smith	Barbara Smith	Lucas	Smith	Dolphins	Sunday	09:00:00	Booking Made	barbaras@xt
9	2	Smith	Barbara Smith	Sam	Smith	Dolphins	Wednesday	09:30:00	Booking Made	barbaras@xt
10	2	Smith	Barbara Smith	Sam	Smith	Seals	Wednesday	13:00:00	Booking Made	barbaras@xt
11	2	Smith	Barbara Smith	Lucas	Smith	Dolphins	Sunday	09:00:00	Booking Made	barbaras@xt
12	2	Smith	Barbara Smith	Lucas	Smith	Dolphins	Sunday	14:00:00	Booking Made	barbaras@xt
13	2	Smith	Barbara Smith	Lucas	Smith	Dolphins	Sunday	14:00:00	Booking Made	barbaras@xt

Printing Booking Letters

The following set of letters are generated within the Bookings module using a document template. Each document will be personalised to contain the specific details of each booking.

Printing a Confirmation Letter

1. Locate the booking you wish to print a confirmation letter for.
2. Select **Confirmation Letter...Single Booking** from the Print menu.
3. A confirmation letter will be generated for the active record only. It will be sent directly to the printer or email application (it will not be previewed on your screen).

YOUR SCHOOL NAME HERE
Street Address, 2nd Line of Street Address, Suburb, CITY
Telephone: Fax:

BOOKING CONFIRMATION

Bridget Smith
6A Erlestoke Crescent
Churton Park
WELLINGTON 4001

Thank you for booking Lucas Smith into Learn To Swim at Your School Name Here.

Lucas is booked into the following class;

Class: Dolphins
Start Time: 2:00 PM
Start Date: 4/05/2014
Instructor: Brian Thomson

If this booking is incorrect please contact us on so we can amend our records.

The balance of fees due for Lucas Smith is: \$81.00. Cash, cheque and eftpos payments are accepted and full payment is due by the second week of the term.
Thank you for swimming with us.

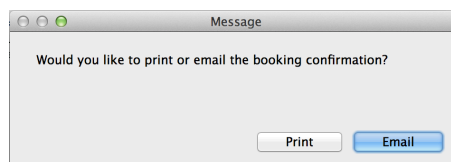
Kind regards

Learn To Swim Coordinator
Your School Name Here

15 June 2014

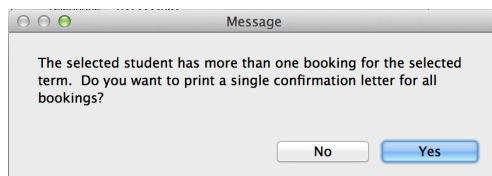
NB: Select **Print Confirmation Letter (Found Set)** to print confirmation letters for all records in the list view.

NB: If the selected student has an email address recorded the following dialog box will be displayed.



Printing a Confirmation Letter for a Student with Multiple Bookings

1. Locate the student you wish to print a confirmation letter for.
2. Select **Print Confirmation... Student Confirmation Letter** from the Print menu.
3. If the student has more than one booking for the selected term the following dialog box will be displayed



4. A confirmation letter will be generated for the active record only. It will be sent directly to the printer or email application (it will not be previewed on your screen).

YOUR SCHOOL NAME HERE

Street Address, 2nd Line of Street Address, Suburb, CITY
Telephone: Fax:

BOOKING CONFIRMATION

15 June 2014

Barbara Smith
6A Erlestoke Crescent
Churton Park
WELLINGTON 4001

Thank you for booking Jacob Smith into Learn To Swim at Your School Name Here.

Jacob's bookings are as follows;

Class: Seals with Barbara Smith starting on Tuesday 6 May 2014 at 10:30 AM

Class: Seals with Barbara Smith starting on Sunday 4 May 2014 at 9:30 AM

The balance of fees due for Jacob are: \$162.00. Cash, cheque and eftpos payments are accepted and full payment is due by the second week of the term.

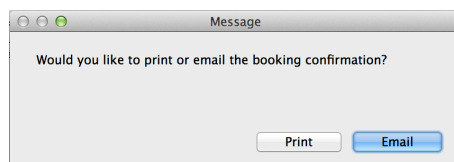
Thank you for swimming with us.

Kind regards

Learn To Swim Coordinator
Your School Name Here

NB: Select **Print Confirmations for Students with Multi Bookings (Found Set)** to print confirmation letters for all records in the list view.

NB: If the selected student has an email address recorded the following dialog box will be displayed.



Printing a Confirmation Letter for a Family with Multiple Bookings

1. Locate a booking (in the required term) for the family you wish to print a confirmation letter for.
2. Select **Confirmation Letter...Family Confirmation Letter** from the Print menu.
3. A confirmation letter will be generated for the active record only. It will be sent directly to the printer or email application (it will not be previewed on your screen).

YOUR SCHOOL NAME HERE

Street Address, 2nd Line of Street Address, Suburb, CITY
Telephone: Fax:

BOOKING CONFIRMATION

15 June 2014

Barbara Smith
6A Erlestoke Crescent
Churton Park
WELLINGTON 4001

Thank you for your booking with Your School Name Here.

Your family members have been scheduled to attend the following lessons:

Sam is booked in Dolphins with Barbara Smith starting on Tuesday 6 May 2014 at 9:30 AM

Jacob is booked in Seals with Barbara Smith starting on Tuesday 6 May 2014 at 10:30 AM

Lucas is booked in Dolphins with Brian Thomson starting on Sunday 4 May 2014 at 2:00 PM

Jacob is booked in Seals with Barbara Smith starting on Sunday 4 May 2014 at 9:30 AM

If these lessons are incorrect or you need to change your lesson time please call .

The balance owing on your family account is \$243.00 (incl GST). Please ensure payment is made by week 2 of the term.

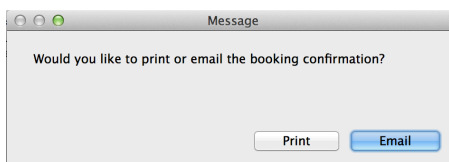
Thank you for swimming with us.

Kind regards

Learn To Swim Coordinator
Your School Name Here

NB: Select **Print Confirmations for Families with Multi Bookings (Found Set)** to print confirmation letters for all records in the list view.


NB: If the selected student has an email address recorded the following dialog box will be displayed.



Remittance Form

A remittance form will be displayed at the base of all **printed** booking confirmation letters and reminder notices. The remittance form displayed is defined to display credit card details **ONLY** if credit cards have been defined in the Preferences within the School Details.

Remittance for Cash or Cheque

 Return to:
YOUR SCHOOL NAME HERE
PO Box 2086
Kuripuni
MASTERTON 5842

Please find enclosed payment of \$243.00 for the above lessons.

I wish to pay by:

Cash ☐ Eftpos ☐
Cheque ☐

Family ID: 2 (Smith)
Term: 2 2014

Payment is due by 4 May 2014

Remittance for Credit Card

Return to:
YOUR SCHOOL NAME HERE
PO Box 2086
Kuripuni
MASTERTON 5842

Please find enclosed payment of \$243.00 for the above lessons.

I wish to pay by:

Cash	<input type="checkbox"/>	Eftpos	<input type="checkbox"/>
Cheque	<input type="checkbox"/>	Credit Card	<input type="checkbox"/>

Family ID: 2 (Smith)
Term: 2 2014

Visa / Mastercard

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Payment is due by 4 May 2014

Expiry Date:

		/		
--	--	---	--	--

Card Name _____

For Office Use

--	--	--

Authorised Signature _____

Printing a Reminder Notice

1. Locate the booking you wish to print a Reminder Notice for.
2. Select **Payment Reminder... Gentle Reminder** from the Print menu.
3. A Reminder Notice will be generated for the active record only. Your system preferences will determine whether the document will be sent directly to the printer or email application.

YOUR SCHOOL NAME HERE
Street Address, 2nd Line of Street Address, Suburb, CITY
Telephone: Fax:

REMINDER NOTICE

Barbara Smith
6A Erlestoke Crescent
Churton Park
WELLINGTON 4001

It seems you have overlooked the payment for Jacob's lessons which were due for payment on 6/05/2014.
There is currently an outstanding amount of \$81.00.

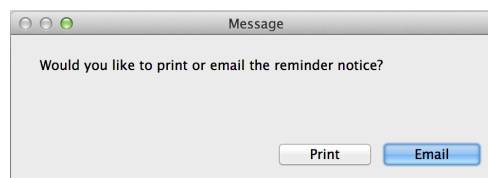
Thank you for swimming with us.

Kind regards

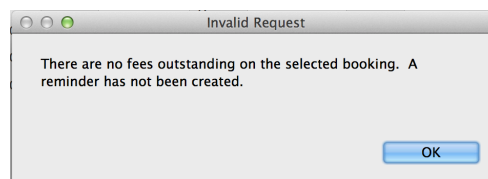
Learn To Swim Coordinator
Your School Name Here

15 June 2014

NB: If the selected student has an email address recorded the following dialog box will be displayed.



NB: Select **Payment Reminder... Gentle Reminder (Found Set)** to print reminder notices for all records currently displayed in the list view.



Printing an Overdue Reminder Notice

1. Locate the booking you wish to print a Reminder Notice for.
2. Select **Payment Reminder... Followup Reminder** from the Print menu.
3. A Reminder Notice will be generated for the active record only. Your system preferences will determine whether the document will be sent directly to the printer or email application.

YOUR SCHOOL NAME HERE

Street Address, 2nd Line of Street Address, Suburb, CITY
Telephone: Fax:

REMINDER NOTICE

15 June 2014

Barbara Smith
6A Erlestoke Crescent
Churton Park
WELLINGTON 4001

Our records show that Jacob's booking is overdue for payment. There is currently an outstanding amount of \$81.00 which was due for payment on 6/05/2014.

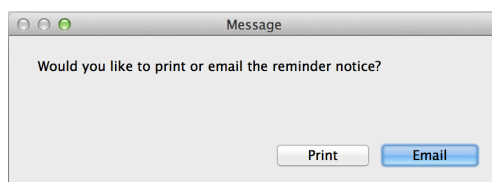
If you wish to continue swimming please forward payment or contact our office on to discuss payment options.

Thank you for swimming with us.

Kind regards

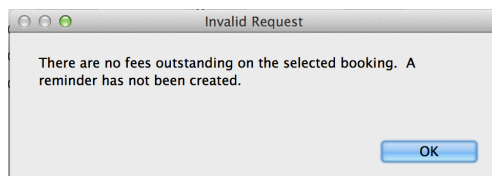
Learn To Swim Coordinator
Your School Name Here

NB: If the selected student has an email address recorded the following dialog box will be displayed.



NB: Select **Payment Reminder... Followup Reminder (Found Set)** to print reminder notices for all records currently displayed in the list view.

NB: If the selected booking does not have fees owing the Invalid Request dialog will be displayed.



Printing a Transfer Notice

1. Locate the booking you wish to print a Transfer Notice for.
2. Select **Booking Confirmation... Transfer Details** from the Print menu.
3. A Transfer notice will be generated for the active record only. Your system preferences will determine whether the document will be sent directly to the printer or email application.

YOUR SCHOOL NAME HERE
Street Address, 2nd Line of Street Address, Suburb, CITY
Telephone: Fax:

CONFIRMATION OF TRANSFER

15 June 2014

Barbara Smith
6A Erlestoke Crescent
Churton Park
WELLINGTON 4001

Thank you for booking Jacob Smith into Learn To Swim at Your School Name Here.

Jacob has been transferred into the following class;

Class: Seals
Start Time: 9:30 AM
Weekday: Sunday
Instructor: Barbara Smith

If this booking is incorrect please contact us on so we can amend our records.

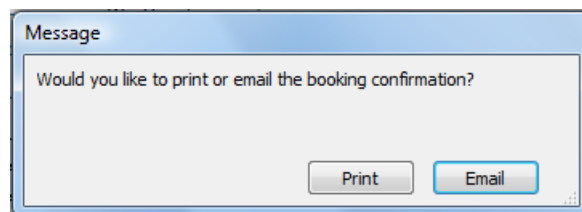
The balance of fees due for Jacob Smith is: \$81.00. Cash, cheque and eftpos payments are accepted and full payment is due by the second week of the term.

Thank you for swimming with us.

Kind regards

Learn To Swim Coordinator
Your School Name Here

NB: If the selected student has an email address recorded the following dialog box will be displayed.

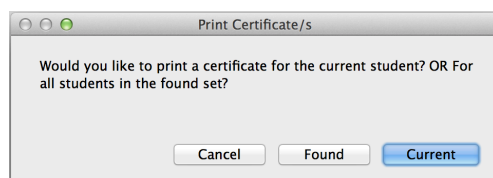


Printing Certificates and Records of Achievement

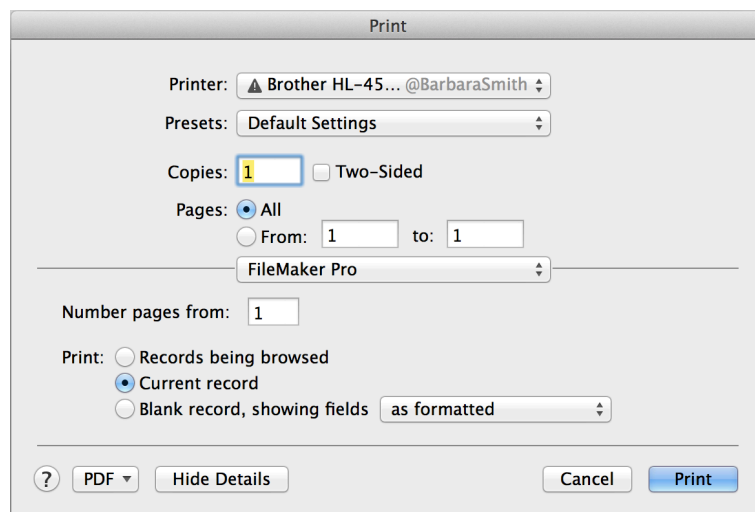
Printing Certificates

Certificates have been designed to print on A4 paper. Contact the developer to customise the position of the student name.

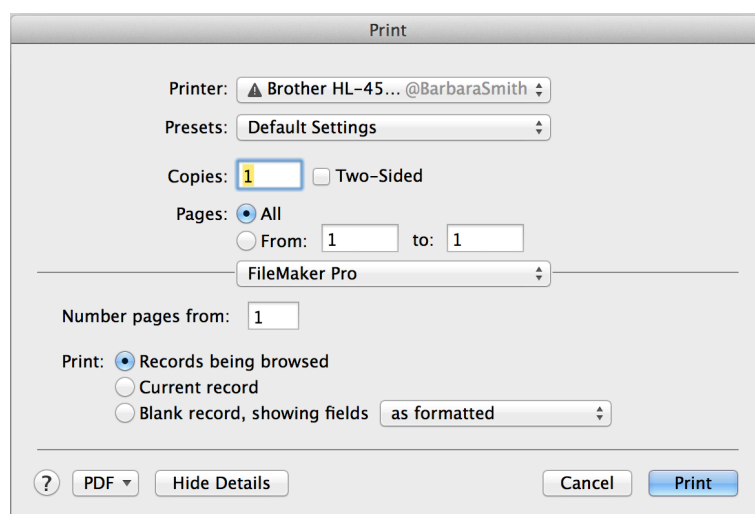
1. Locate the booking/s you wish to print certificates for.
2. Select **Student Certificate** from the Print menu.
3. A sample certificate for the current record will be displayed on your screen. You will be asked whether you wish to print a certificate for the Current record or the Found set of records.



NB: When Current is selected in the dialog, the same will be selected in the Print dialog box.



NB: When Found is selected in the dialog, Records Being Browsed will be selected in the Print dialog box.



30/04/06

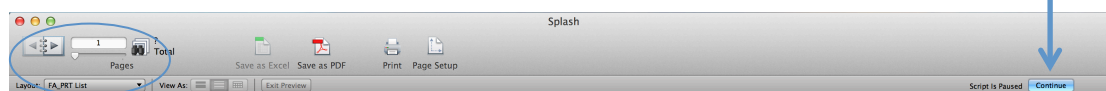
Sam Williams

The certificate will be date stamped on the bottom left corner.

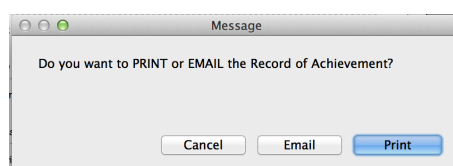
Printing a Record of Achievement

Use this command to produce a progress report displaying a student's current set of goals and progress towards completion. In many schools this list is printed on the reverse side of the certificate. A record of achievement can however be sent in isolation.

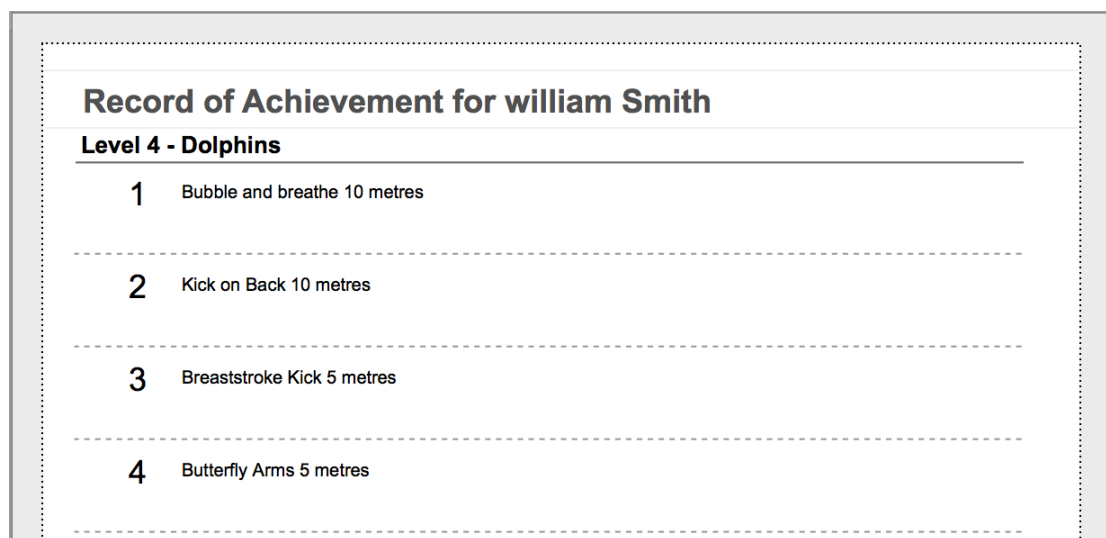
1. Use the **Finding a Booking** function to locate the record you wish to produce a Record of Achievement for.
2. The found record will be displayed in a list on your screen. (if the record is incorrect repeat step 1)
3. Select **Record of Achievement** from the Print menu.
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.



6. Click **Print** to print the report, **Email** to save the report as a PDF and email to the client, or **Cancel** to return to your original screen without printing.

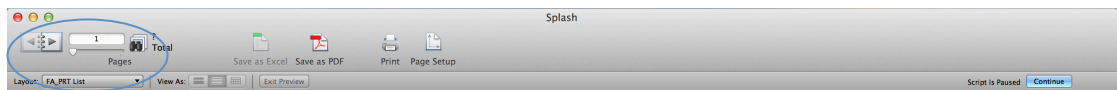


Printing a Record of Achievement for the Found Set of Records

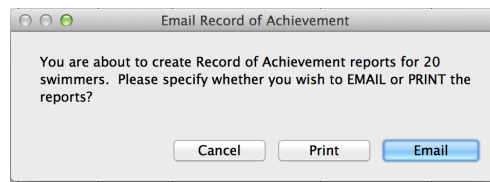
Use this command to produce progress reports displaying each student's current set of goals and progress towards completion. This command will produce a progress report for all students in the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to produce Record of Achievements for.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Record of Achievement [Found Set]** from the Print menu.
4. The first report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).





5. The **Record of Achievement** dialog will be displayed on your screen.



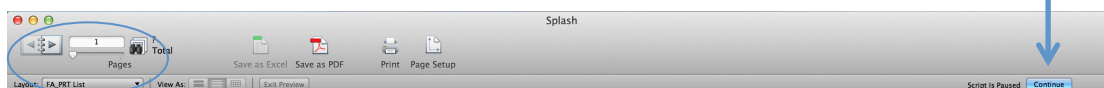
6. Click **Print** to print the report, **Email** to save the report as a PDF and email to each client, or **Cancel** to return to your original screen without printing or emailing.

Printing Booking Reports

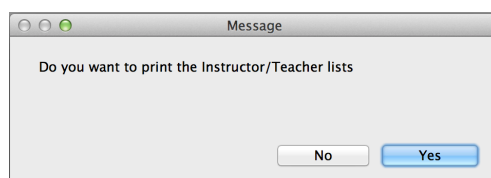
Printing a Student List for the Instructor

This report provides instructors with a list of students expected for each session.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of... Students for the Instructor** from the Print menu.
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages.



5. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



6. Click **OK** to print the report or Cancel to return to your original screen without printing.

Attendance List

Instructor Listing for Barbara Smith

Wednesday

9:00 AM - Turtles (Learners Pool)

Barbara Smith (1 Students)

				9/7	16/7	23/7	30/7	6/8	13/8	20/8	27/8	3/9	10/9	17/9	24/9	# Attempts
<input type="radio"/>	William Jessop	12_10m	Tony Jessop													5

10:30 AM - Turtles (Learners Pool)

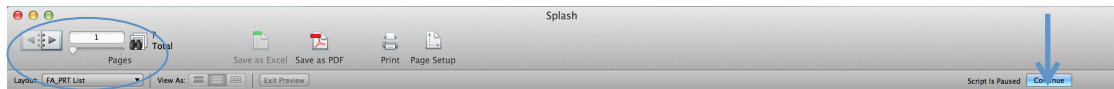
Barbara Smith (6 Students)

				9/7	16/7	23/7	30/7	6/8	13/8	20/8	27/8	3/9	10/9	17/9	24/9	# Attempts
<input checked="" type="checkbox"/>	Bridgette	13_9m	Nicola Robinso	P												2
<input checked="" type="checkbox"/>	Jack McArthur	11_8m	Andrew McArthu	P	A	A										7
<input type="radio"/>	Jamie watkins	6_2m		P												2
<input checked="" type="checkbox"/>	Janet Kimble	3_8m	Amanda Kimble													8
<input checked="" type="checkbox"/>	Sam Williams	4_0m	Malcolm Willia													7
<input checked="" type="checkbox"/>	Susan Aplin	3_0m	Sylvia Aplin													5

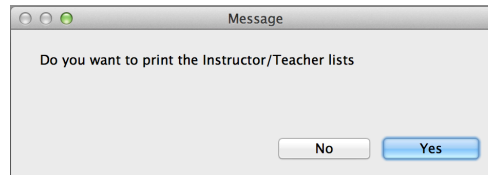
Printing a List of Students for the Pool Deck Supervisor

This report provides a summary of attendance for each student booked in the selected sessions. This report can be used by the pool supervisor to record attendance for all sessions operating at a selected time.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of... Students for the Supervisor** from the Print menu.
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages.



- When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



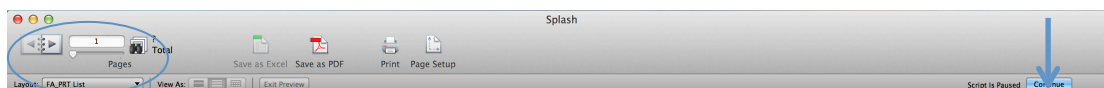
6. Click **OK** to print the report or **Cancel** to return to your original screen without printing.

[illegible]

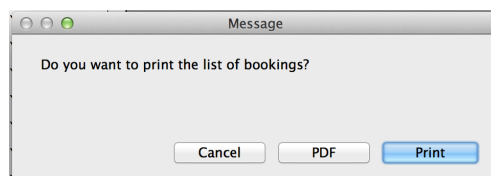
Printing a List of Bookings

Information displayed in this report is defined by the found set of records (what is displayed in your List View). Prior to generating this report you must perform a find to locate the group of records you wish to report on.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of... Bookings** from the Print menu.
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages.



5. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



6. Click **OK** to print the report or Cancel to return to your original screen without printing.

List of Bookings								
Student ID / Name	Class Name	Start Date / Time	Term / Year		Rebooked		Next Term	
35	David King	Dolphins	9/5/14	2:00 PM	2	2014	Paid in Full	Yes
77	Jessica Sinclair	Dolphins	10/5/14	9:30 AM	2	2014	Paid in Full	Yes
77	Jessica Sinclair	Dolphins	10/5/14	2:00 PM	2	2014	Paid in Full	Yes
166	William Smith	Dolphins	4/5/14	9:30 AM	2	2014	Credit	Yes
162	Lucas Smith	Dolphins	4/5/14	2:00 PM	2	2014	Booking Made	No
123	Jamie Watkins	Dolphins	4/5/14	9:00 AM	2	2014	Paid in Full	Yes
71	Georgia Taylor	Dolphins	4/5/14	9:00 AM	2	2014	Paid in Full	Yes
103	Gareth Buchanan	Dolphins	4/5/14	2:00 PM	2	2014	Paid in Full	Yes

Printing a Report of Account Balances

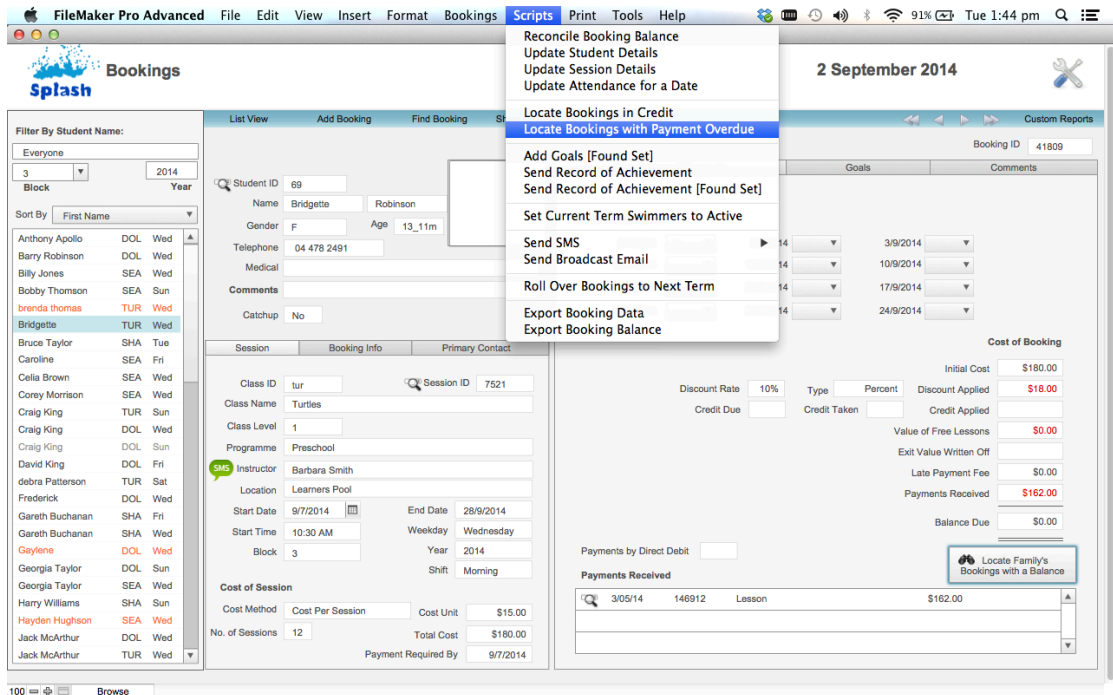
Information displayed in this report is defined by the found set of records. Prior to generating this report you must perform a find to locate the group of records you wish to include in your report.

A script has been added to the bookings file that will help you locate all bookings with monies outstanding.

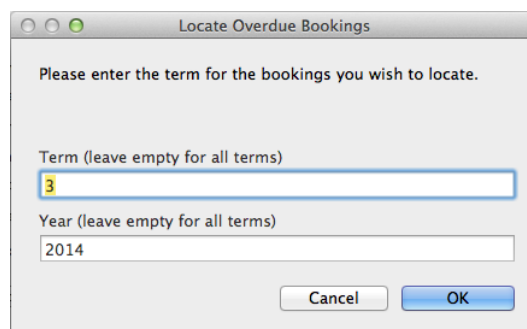
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



3. Go to the **Scripts** menu to select **Locate Bookings with Payment Overdue**.




4. You will be requested to define the term and year for overdue accounts (leave blank for all outstanding accounts).



5. Click the **OK** button to locate bookings which are overdue for payment.

Splash



Bookings


Block













3

Year

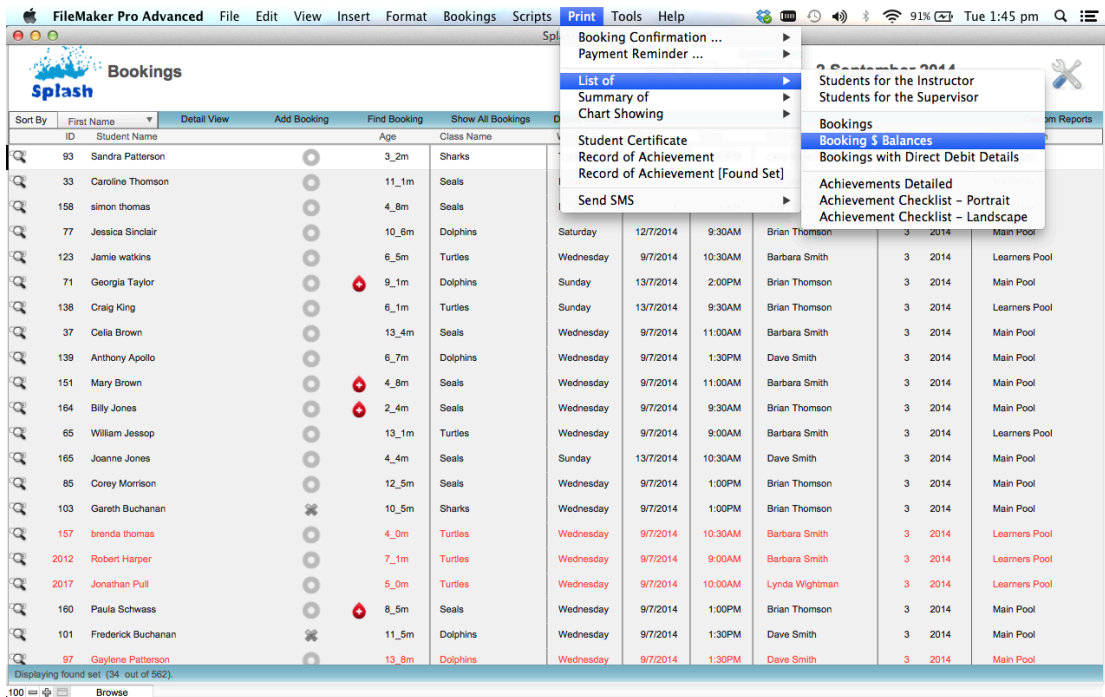
2014

2 September 2014

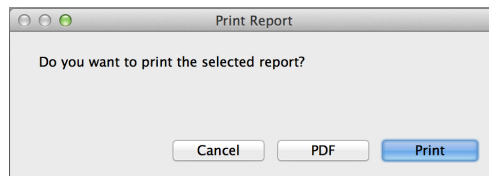


Sort By	<div>First Name</div>	Detail View	Add Booking	Find Booking	Show All Bookings	Delete Booking	Custom Reports					
	ID	Student Name		Age	Class Name	Weekday	Start	Time	Instructor	Block	Year	Location
	93	Sandra Patterson		3_2m	Sharks	Tuesday	8/7/2014	1:00PM	Jane Brown	3	2014	Main Pool
	33	Caroline Thomson		11_1m	Seals	Friday	11/7/2014	9:30AM	Barbara Smith	3	2014	Main Pool
	158	simon thomas		4_8m	Seals	Friday	11/7/2014	10:30AM	Brian Thomson	3	2014	Main Pool
	77	Jessica Sinclair		10_6m	Dolphins	Saturday	12/7/2014	9:30AM	Brian Thomson	3	2014	Main Pool
	123	Jamie watkins		6_5m	Turtles	Wednesday	9/7/2014	10:30AM	Barbara Smith	3	2014	Learners Pool
	71	Georgia Taylor		9_1m	Dolphins	Sunday	13/7/2014	2:00PM	Brian Thomson	3	2014	Main Pool

6. Select **List of... Bookings \$ Balances** from the Print menu.



7. The report will be previewed on your screen. Use the status panel at the top of the screen to view subsequent pages. When you have finished viewing the report click the **Continue** button (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



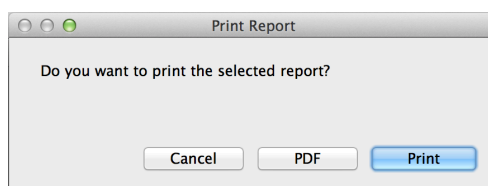
8. Click **OK** to print the report or Cancel to return to your original screen without printing.

Bookings - Current Balance of Booking						
Balance as at 15/6/2014						
						Balance
Anderson (David Anderson)				09 897 9845		\$364.50
Sally Anderson	Turtles	Wed	LW	Term: 4	2014	\$121.50
Sally Anderson	Turtles	Sun	BS	Term: 4	2014	\$121.50
Sally Anderson	Turtles	Sun	BT	Term: 4	2014	\$121.50
Aplin (Sylvia Aplin)				04 236 5981		\$364.50
Susan Aplin	Turtles	Wed	LW	Term: 4	2014	\$121.50
Susan Aplin	Turtles	Wed	LW	Term: 4	2014	\$121.50
Susan Aplin	Turtles	Wed	LW	Term: 4	2014	\$121.50
Apollo (Martha Apollo)				756 7898		\$432.00
Anthony Apollo	Dolphins	Wed	DS	Term: 3	2014	\$108.00
Anthony Apollo	Dolphins	Wed	DS	Term: 4	2014	\$81.00
Anthony Apollo	Dolphins	Wed	DS	Term: 4	2014	\$81.00
Anthony Apollo	Dolphins	Sun	BT	Term: 4	2014	\$81.00
Anthony Apollo	Dolphins	Sun	BT	Term: 4	2014	\$81.00

Printing a List of Direct Debit Payments

Information displayed in this report is defined by the found set of records. Prior to generating this report you must perform a find to locate the group of records you wish to report on.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report. To locate all records with outstanding money due and also paying by direct debit enter ">0" in the amount field and Yes in the Direct Debit field.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of... Bookings with Direct Debit Details** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



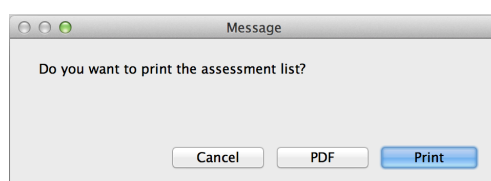
5. Click **Print** to print the report, **PDF** to save a copy of the report, or **Cancel** to return to your original screen without printing.

Bookings - Direct Debit Payment Summary							Amount	Balance
Schedule as at 27/1/2015								
Apollo (Martha Apollo)								
Anthony Apollo	Dolphins	Wed	Block: 3	2014			\$9.00	\$81.00
Brown (Sam Brown)								
Celia Brown	Seals	Wed	Block: 3	2014			\$9.00	\$81.00
Brown (Peter Brown)								
Mary Brown	Seals	Wed	Block: 3	2014			\$9.00	\$81.00
Buchanan (Debbie Buchanan)								
Frederick Buchanan	Dolphins	Fri	Block: 3	2014			\$9.00	\$79.00
Hughson (Ngaire Hughson)								
Stephanie Hughson	Dolphins	Wed	Block: 3	2014			\$9.00	\$81.00
Jessop (Tony Jessop)								
William Jessop	Turtles	Wed	Block: 3	2014			\$13.50	\$121.50
Jones (David Jones)								
Billy Jones	Seals	Wed	Block: 3	2014			\$9.00	\$81.00
Joanne Jones	Seals	Sun	Block: 3	2014			\$9.00	\$81.00
King (Nathan King)								
Craig King	Turtles	Sun	Block: 3	2014			\$13.50	\$121.50
McArthur (Andrew McArthur)								
Jack McArthur	Turtles	Wed	Block: 3	2014			\$13.50	\$40.50
Jack McArthur	Sharks	Wed	Block: 3	2014			\$9.00	\$81.00

Printing an Achievement List (Detailed)

The detailed assessment list provides a list of the found set of students and the goals they are working towards. The result of any previous assessment within the same level is also displayed on the report. Prior to generating this report you must perform a find to locate the group of records you wish to include in your report.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ... Achievements Detailed** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



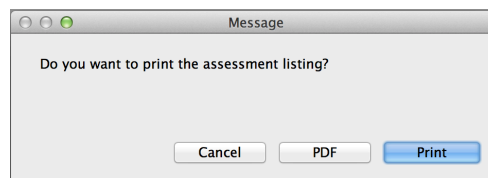
5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Assessment List for Sunday			
9:00 AM	Dolphins (Barbara Smith)		
Gareth Buchanan	10_2m	Attempts:	
1	Bubble and breathe 10 metres		Mastered 4/4/2014
2	Kick on Back 10 metres		Mastered 4/4/2014
3	Breaststroke Kick 5 metres <i>Needs to work on</i>		Learning 28/4/2014
4	Butterfly Arms 5 metres <i>add a comment</i>		Learning 28/4/2014
5	Testing a Level with 5 Goals		Mastered 1/5/2014
6	Testing a Level with 6 Goals		Mastered 28/4/2014
7	Testing a Level with 7 Goals <i>sjd kdj kjds kjfhds</i>		Introduced

Printing an Achievement List (Checkboxes Only)

The assessment checkbox list provides a list of all students and single checkbox for each goal. The result of their last assessment is displayed in each checkbox on the report. Students displayed in this report are defined by the found set of records. Prior to generating this report you must perform a find to locate the group of records you wish to include in your report.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of... Achievement Checklist** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Assessment Listing for Wednesday											
1:00 PM - Sharks (Main Pool) Brian Thomson (3 Students)											
			BB10	KB10	BKick	FArms	G5	G6	G7	G7	# Attempts
	william Smith	4_4m									12
	Gareth Buchanan	10_2m	M	M	L	L	M	M	I	M	22
	Jack McArthur	11_8m									9
1:30 PM - Dolphins (Main Pool) Dave Smith (3 Students)											
			BB10	KB10	BKick	FArms	G5	G6	G7	G7	# Attempts
	Jack McArthur	11_8m	M	M	L	M	M	M	I		15
	Anthony Apollo	6_4m									8

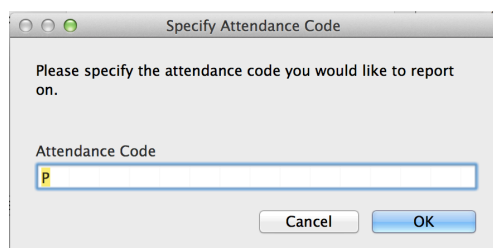
NB: Select the landscape format if you have greater than 8 goals to display. Splash supports a maximum of 17 goals in this view

Assessment Listing for Wednesday											
1:00 PM - Sharks (Main Pool) Brian Thomson (3 Students)											
			BB10	KB10	BKick	FArms	G5	G6	G7	G7	# Attempts
	william Smith	4_4m									12
	Gareth Buchanan	10_2m	M	M	L	L	M	M	I	M	22
	Jack McArthur	11_8m									9
1:30 PM - Dolphins (Main Pool) Dave Smith (3 Students)											
			BB10	KB10	BKick	FArms	G5	G6	G7	G7	# Attempts
	Jack McArthur	11_8m	M	M	L	M	M	M	I		15
	Anthony Apollo	6_4m									8
	Frederick	11_2m									7
2:30 PM - Dolphins (Main Pool) Barbara Smith (4 Students)											
			BB10	KB10	BKick	FArms	G5	G6	G7	G7	# Attempts
	Craig King	5_10m	I								20

Printing an Attendance Summary by Week Day

This report displays the total number of students who have attended sessions in the selected term. Information displayed in this report is defined by the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of... Attendance by Weekday** from the Print menu.
4. A dialog will be displayed asking which attendance code you wish to analyse. Enter the attendance code you require and click OK.



Specify Attendance Code

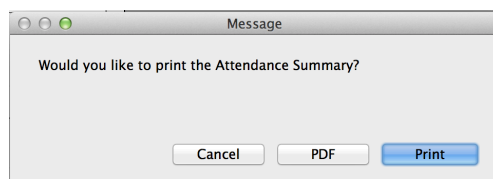
Please specify the attendance code you would like to report on.

Attendance Code

P

Cancel OK

5. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



Message

Would you like to print the Attendance Summary?

Cancel PDF Print

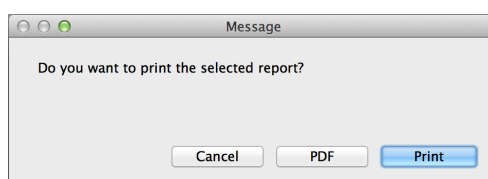
6. Click **OK** to print the report or Cancel to return to your original screen without printing the report.

Summary of Attendance														
Attendance Code : P														
Term 2 - 2014														
	5	6/05	13/05	20/05	27/05	3/06	10/06	17/06	24/06	1/07				
Tuesday		5	3	5	5	1	0	0	0	0	0	0	0	0
Dolphins		3	2	3	3	1	0	0	0	0	0	0	0	0
Seals		1	0	1	1	0	0	0	0	0	0	0	0	0
Sharks		1	1	1	1	0	0	0	0	0	0	0	0	0
	5	7/05	14/05	21/05	28/05	4/06	11/06	18/06	25/06	2/07				
Wednesday		5	2	5	5	4	0	0	0	0	0	0	0	0
Dolphins		2	1	2	2	2	0	0	0	0	0	0	0	0
Seals		1	1	1	1	1	0	0	0	0	0	0	0	0
Turtles		2	0	2	2	1	0	0	0	0	0	0	0	0
	3	9/05	16/05	23/05	30/05	6/06	13/06	20/06	27/06	4/07				
Friday		3	3	3	3	2	0	0	0	0	0	0	0	0
Dolphins		1	1	1	1	1	0	0	0	0	0	0	0	0
Seals		2	2	2	2	1	0	0	0	0	0	0	0	0

Printing a Summary of Bookings by Class Name

This report displays the total number of students booked in each type of class for each day of the week. Information displayed in this report is defined by the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of... Bookings by Class Name** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



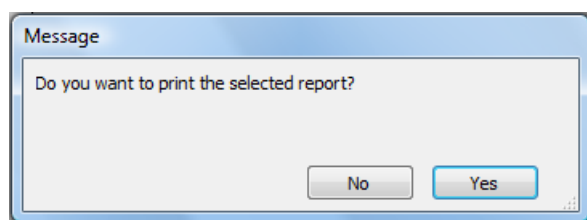
5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Summary of Bookings			
Summary by Class Name			
	Number of Bookings	Number of Exits	Number of Catchups
Term: 2 2014	36	1	6
Dolphins	17	0	1
<i>Friday</i>	1	0	0
<i>Saturday</i>	2	0	0
<i>Sunday</i>	9	0	1
<i>Tuesday</i>	3	0	0
<i>Wednesday</i>	2	0	0
Seals	11	1	0
<i>Friday</i>	2	0	0
<i>Sunday</i>	7	1	0
<i>Tuesday</i>	1	0	0
<i>Wednesday</i>	1	0	0

Printing a Summary of Bookings by Week Day

This report displays the total number of students booked in each type of class for each day of the week. Information displayed in this report is defined by the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of... Bookings by Weekday** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



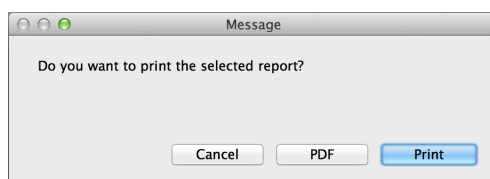
5. Click **OK** to print the report or Cancel to return to your original screen without printing the report.

Summary of Bookings			
Summary by Weekday			
	Number of Bookings	Number of Exits	Number of Catchups
Term: 2 2014	36	1	6
Friday	3	0	0
<i>Dolphins</i>	1	0	0
<i>Seals</i>	2	0	0
Saturday	2	0	0
<i>Dolphins</i>	2	0	0
Sunday	21	1	1
<i>Dolphins</i>	9	0	1
<i>Seals</i>	7	1	0
<i>Sharks</i>	1	0	0
<i>Turtles</i>	4	0	0

Printing a Summary of Bookings by Shift

This report displays the total number of students booked in each type of class within each shift. Information displayed in this report is defined by the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of... Bookings by Shift** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



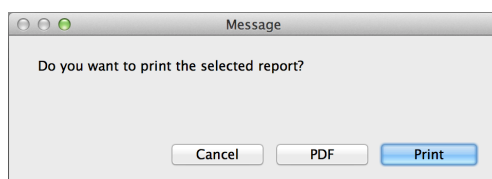
5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Summary of Bookings			
Summary by Shift			
	Number of Bookings	Number of Exits	Number of Catchups
Term: 2 2014	36	1	6
Afternoon	7	0	0
<i>Dolphins</i>	7	0	0
Morning	29	1	6
<i>Dolphins</i>	10	0	1
<i>Seals</i>	11	1	0
<i>Sharks</i>	2	0	0
<i>Turtles</i>	6	0	5

Printing a Summary of Bookings by Program

This report displays the total number of students booked in each class within each program. Information displayed in this report is defined by the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of... Bookings by Program** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



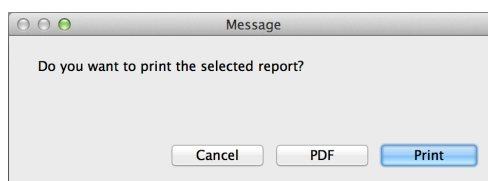
5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Summary of Bookings			
Summary by Program			
	Number of Bookings	Number of Exits	Number of Catchups
Term: 2 2014	36	1	6
Preschool	6	0	5
<i>Turtles</i>	6	0	5
School Age	30	1	1
<i>Dolphins</i>	17	0	1
<i>Seals</i>	11	1	0
<i>Sharks</i>	2	0	0

Printing a Summary of Revenue by Class

This report displays the total revenue for the found set of records. It includes a breakdown of payments received, discounts, credits given, and expected revenue for the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of... Revenue by Class Name** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



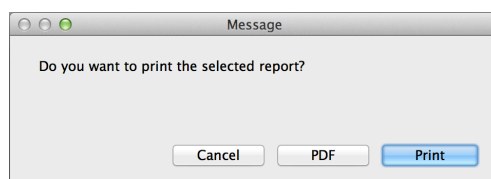
5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Summary of Booking Revenue								
as at 15/6/2014								
	Total Cost	Total Discount	Value Credits	Value Free Lessons	Plus Late Payment	Value Exits	Total Paid	Total Outstanding
Dolphins	\$750.00	\$88.50	\$2.00	\$3.00	\$0.00	\$0.00	\$544.00	\$112.50
Friday	\$0.00	\$0.00				\$0.00	\$0.00	\$0.00
Saturday	\$120.00	\$12.00		\$0.00	\$0.00	\$0.00	\$108.00	\$0.00
Sunday	\$400.00	\$53.50	\$2.00	\$3.00	\$0.00	\$0.00	\$274.00	\$67.50
Tuesday	\$90.00	\$9.00		\$0.00	\$0.00	\$0.00	\$81.00	\$0.00
Wednesday	\$140.00	\$14.00		\$0.00	\$0.00	\$0.00	\$81.00	\$45.00
Seals	\$550.00	\$45.00		\$0.00	\$0.00	\$0.00	\$162.00	\$343.00
Friday	\$0.00	\$0.00				\$0.00	\$0.00	\$0.00
Sunday	\$360.00	\$36.00		\$0.00	\$0.00	\$0.00	\$162.00	\$162.00
Tuesday	\$90.00	\$9.00				\$0.00	\$0.00	\$81.00

Printing a Summary of Revenue by Weekday

This report displays the total revenue for the found set of records. It includes a breakdown of payments received, discounts, credits given, and expected revenue for the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of... Revenue by Weekday** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



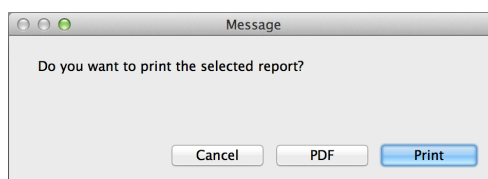
5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Summary of Booking Revenue								
as at 15/6/2014								
	Total Cost	Total Discount	Value Credits	Value Free Lessons	Plus Late Payment	Value Exits	Total Paid	Total Outstanding
Friday	\$0.00	\$0.00				\$0.00	\$0.00	\$0.00
Dolphins	\$0.00	\$0.00				\$0.00	\$0.00	\$0.00
Seals	\$0.00	\$0.00				\$0.00	\$0.00	\$0.00
Saturday	\$120.00	\$12.00		\$0.00	\$0.00	\$0.00	\$108.00	\$0.00
Dolphins	\$120.00	\$12.00		\$0.00	\$0.00	\$0.00	\$108.00	\$0.00
Sunday	\$850.00	\$98.50	\$2.00	\$3.00	\$0.00	\$0.00	\$436.00	\$310.50
Dolphins	\$400.00	\$53.50	\$2.00	\$3.00	\$0.00	\$0.00	\$274.00	\$67.50
Seals	\$360.00	\$36.00		\$0.00	\$0.00	\$0.00	\$162.00	\$162.00
Sharks	\$90.00	\$9.00				\$0.00	\$0.00	\$81.00
Turtles	\$0.00	\$0.00				\$0.00	\$0.00	\$0.00

Printing a Summary of Revenue by Shift

This report displays the total revenue for the found set of records. It includes a breakdown of payments received, discounts, credits given, and expected revenue for the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of... Revenue by Shift** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



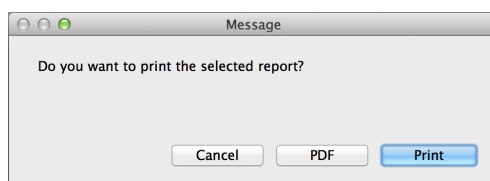
5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Summary of Booking Revenue								
as at 15/6/2014								
	Total Cost	Total Discount	Value Credits	Value Free Lessons	Plus Late Payment	Value Exits	Total Paid	Total Outstanding
Afternoon	\$440.00	\$44.00	\$2.00	\$3.00	\$0.00	\$0.00	\$265.00	\$126.00
Friday	\$0.00	\$0.00				\$0.00	\$0.00	\$0.00
Saturday	\$120.00	\$12.00		\$0.00	\$0.00	\$0.00	\$108.00	\$0.00
Sunday	\$180.00	\$18.00	\$2.00	\$3.00		\$0.00	\$76.00	\$81.00
Tuesday	\$90.00	\$9.00		\$0.00	\$0.00	\$0.00	\$81.00	\$0.00
Wednesday	\$50.00	\$5.00		\$0.00	\$0.00	\$0.00	\$0.00	\$45.00
Morning	\$1,130.00	\$107.50		\$0.00	\$0.00	\$0.00	\$441.00	\$581.50
Friday	\$0.00	\$0.00				\$0.00	\$0.00	\$0.00
Saturday	\$0.00	\$0.00				\$0.00	\$0.00	\$0.00
Sunday	\$670.00	\$80.50		\$0.00	\$0.00	\$0.00	\$360.00	\$229.50

Printing a Summary of Revenue by Program

This report displays the total revenue for the found set of records. It includes a breakdown of payments received, discounts, credits given, and expected revenue for the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of... Revenue by Program** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



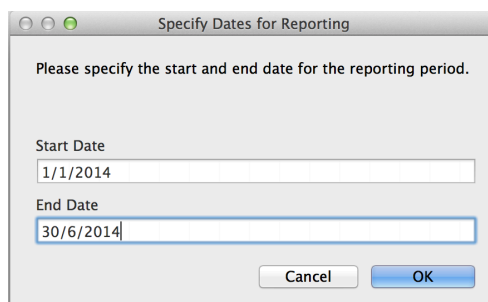
5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Summary of Booking Revenue								
as at 15/6/2014								
	Total Cost	Total Discount	Value Credits	Value Free Lessons	Plus Late Payment	Value Exits	Total Paid	Total Outstanding
Preschool	\$180.00	\$9.00		\$0.00	\$0.00	\$0.00	\$0.00	\$171.00
Turtles	\$180.00	\$9.00		\$0.00	\$0.00	\$0.00	\$0.00	\$171.00
School Age	\$1,390.00	\$142.50	\$2.00	\$3.00	\$0.00	\$0.00	\$706.00	\$536.50
Dolphins	\$750.00	\$88.50	\$2.00	\$3.00	\$0.00	\$0.00	\$544.00	\$112.50
Seals	\$550.00	\$45.00		\$0.00	\$0.00	\$0.00	\$162.00	\$343.00
Sharks	\$90.00	\$9.00				\$0.00	\$0.00	\$81.00
Total Reported	\$1,670.00	\$151.50	\$2.00	\$3.00	\$0.00	\$0.00	\$706.00	\$707.50

Printing a Summary of Exits by Date

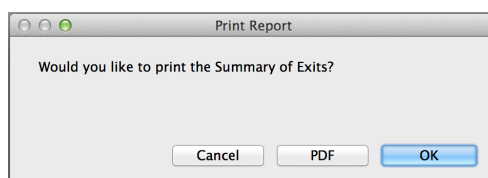
This report displays the total payments received, discounts, credits given, and expected revenue for the found set of records.

1. Select **Summary of... Exits by Date** from the Print menu.
2. The Specify Date for Reporting dialog will be displayed on your screen. Enter the Start Date and the End Date for the period you would like the report to cover. Click OK.



A dialog box titled "Specify Dates for Reporting" with a light gray background. It contains the text "Please specify the start and end date for the reporting period." Below this are two date input fields. The "Start Date" field contains "1/1/2014" and the "End Date" field contains "30/6/2014". At the bottom right are "Cancel" and "OK" buttons.

3. Splash will locate any booking where the exit date falls between the two dates you have specified.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



A dialog box titled "Print Report" with a light gray background. It contains the text "Would you like to print the Summary of Exits?". At the bottom are "Cancel", "PDF", and "OK" buttons.

5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Summary of Bookings			
Summary of Exits	Number of Bookings	Number of Exits	Number of Catchups
Financial	1	1	0
Goals Met	12	12	0
Illness	1	1	0
Injury/Illness	1	1	0
Loss of Interest	2	2	0
Other	1	1	0
other Commitments	2	2	0

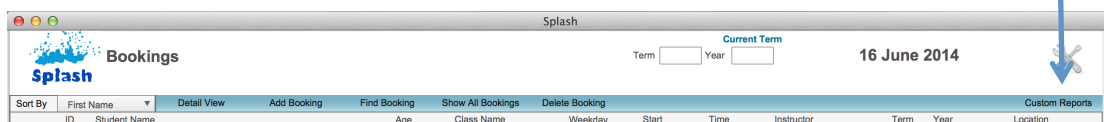
NB: Catchup lessons are NOT included in exit reporting.

Printing a Custom Report

In addition to the generic bookings reports, Splash provides custom report writing by way of the custom report screen.

Displaying the Custom Report Writer

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Click once on the Custom Report button displayed in the blue stripe at the top of your screen.



4. The report writer will be displayed on your screen.

A screenshot of a 'Produce Summary Report' dialog box. The title bar says 'Produce Summary Report'. Inside, there's a section titled 'Specify Report Format' with a grid icon. It contains four steps: Step 1: 'Choose Existing Report Format' with a dropdown menu showing 'Summary by Shift and Instructor'; Step 2: 'Choose/Update Report Summary Groups' with three dropdown menus for Group 1 ('Summarize by Shift'), Group 2 ('Summarize by Instructor Name'), and Group 3 (empty); a 'Show Detail' checkbox is below; Step 3: 'Enter Report Title' with a text field containing 'Summary by Shift and Instructor'; Step 4: 'Produce Report' with an 'OK' button (checked) and a 'Cancel' button at the bottom left.

Defining a Summary Report

The custom report writer is divided into three areas. Upon completion of the three sections you are ready to generate your custom report. Create your custom report by completing the steps outlined below:

1. Select the items to include in the report
2. Choose the information to be included in your report.
3. Give your report a title.

The three fields displayed at **Step 2** are used to define how the information in your report will be structured. Summary totals will be displayed for each category you have defined at levels one, two and three.

If you wish to include detailed information about each family in your report, click the **Show Detail in Report** button.

Step 2: Choose/Update Report Summary Groups

Group 1

Group 2

Group 3

Show Detail ☒

Defining a Summary Report (No Detail)

The sample report below demonstrates the use of summary levels. Drop-down menus have been provided to assist you in structuring your report.

Step 2: Choose/Update Report Summary Groups

Group 1

Group 2

Group 3

Show Detail ☐

Information in the report below has been grouped by the categories as defined above.

Defining a Summary Report (Show Detail)

Information in the report below has been grouped by the categories defined above, however this time **Show Detail in Report** has been selected.

Summary of Bookings			
Summary by Shift and Instructor	Number of Bookings	Number of Exits	Number of Catchups
Afternoon	10	0	0
Barbara Smith	6	0	0
Brian Thomson	4	0	0
Morning	53	2	9
Barbara Smith	21	2	5
Brian Thomson	21	0	1
Dave Smith	4	0	1
Jane Brown	2	0	0
Lynda Wightman	5	0	2

If you wish to include detailed information about each session in your report, click the **Show Detail in Report** button.

Defining a Summary Report (No Detail)

The sample report below demonstrates the use of the summary levels. Drop-down menus have been provided to assist you in structuring your report.

Summary of Bookings			
Summary by Shift and Instructor		Number of Bookings	Number of Exits
Afternoon		10	0
Barbara Smith		6	0
Barry Robinson	46 Hillcrest Road, Johnsonville, Wellington 4007		04 478 2491
Craig King	46 Brooklyn Rd, Brooklyn, Wellington 4008		05 678 4564
Jenny Williams	171 Chapel St, Khandallah, Wellington 4005		04 477 8952
Paula Schwass	123 Any St, Wellington 6440		478 4616
Sarah Williams	171 Chapel St, Khandallah, Wellington 4005		04 477 8952
Stephanie Hughson	98 Barrett St, Ngaio, Wellington 4007		04 654 9524

Printing a Chart

Printing a Chart Showing Bookings by Instructor

This report displays as a graph; it shows the number of bookings for each instructor within the found set of records.

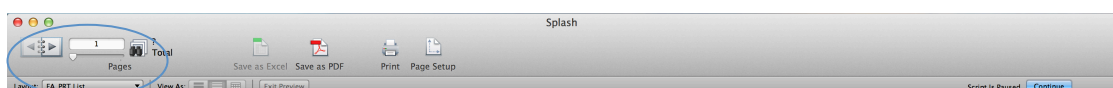
1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Bookings by Instructor** from the Print menu.

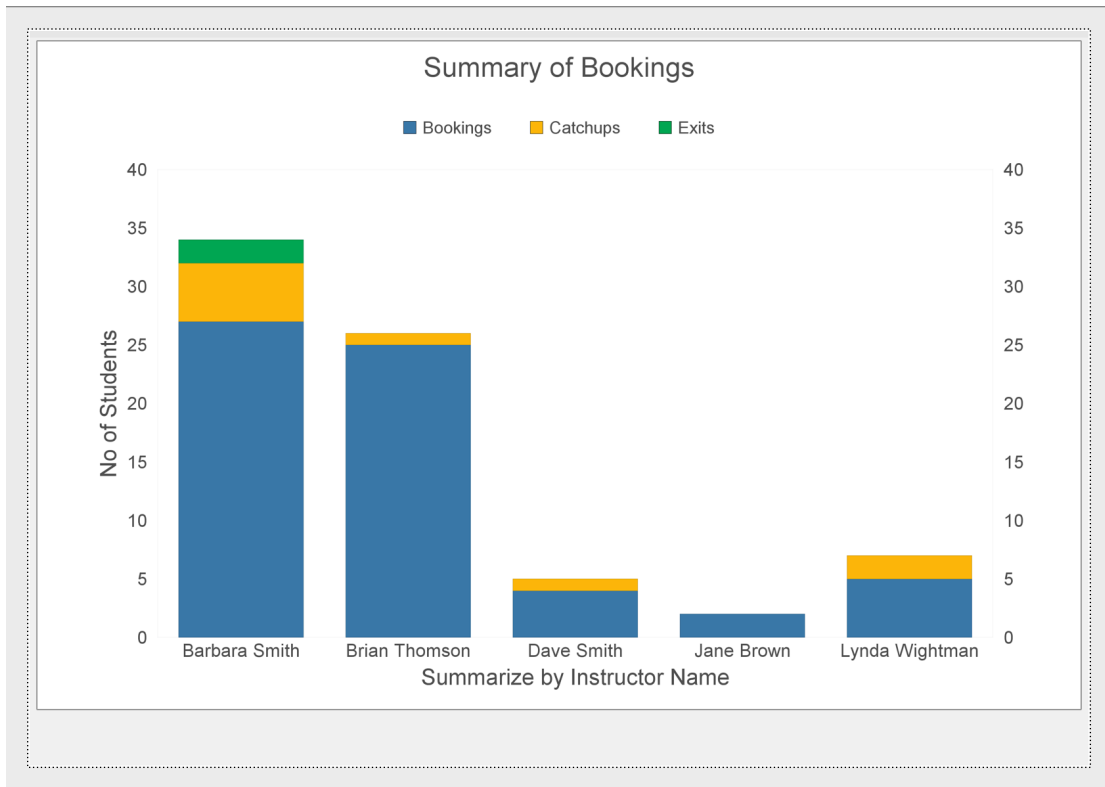
The screenshot shows a dialog box titled "Produce Summary Report" with a sub-header "Specify Report Format". It contains four steps:

- Step 1 : Choose Existing Report Format**
Report Name: Summary of Bookings
- Step 2: Choose/Update Report Summary Groups**
Group 1: Summarize by Instructor Name
- Step 3: Enter Report Title**
Report Title: Summary of Bookings
- Step 4: Produce Report**
OK button (highlighted with a green checkmark)

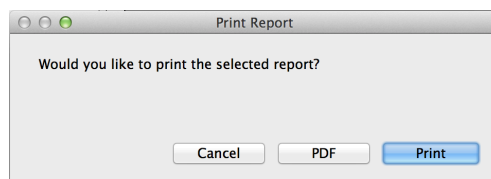
At the bottom left is a Cancel button.

4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
 - Step 1 = Summary of Bookings
 - Step 2 = Group 1 set to Summarize by Instructor
 - Step 3 = Report Name set to Summary by Instructor.
6. Amend the grouping options at Step 2 if required and click the **OK** button.
7. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.





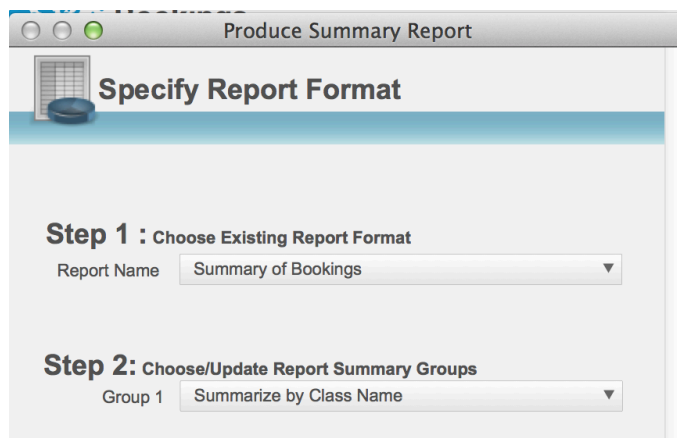
8. The **Print Report** dialog will be displayed on your screen.



Printing a Chart Showing Bookings by Class Name

This report displays as a graph; it shows the number of bookings for each Class Name within the found set of records.

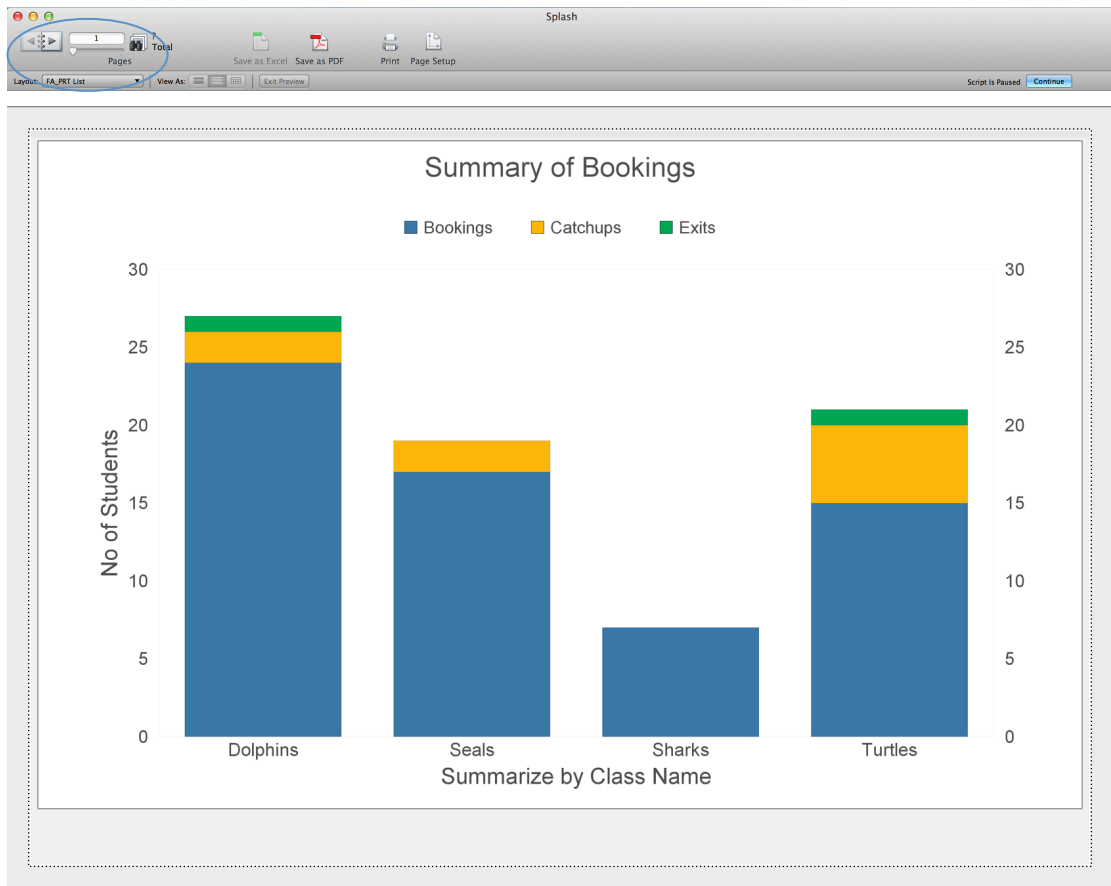
1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Bookings by Class Name** from the Print menu.



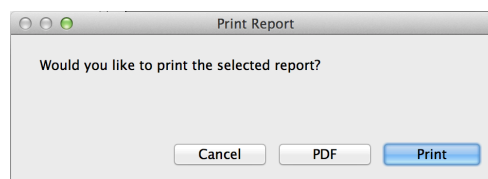
4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary of Bookings

Step 2 = Group 1 set to Summarize by Class Name
 Step 3 = Report Name set to Summary by Class Name.

6. Amend the grouping options at Step 2 if required and click the **OK** button.
7. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



8. The **Print Report** dialog will be displayed on your screen.



Printing a Chart Showing Bookings by Shift

This report displays as a graph; it shows the number of bookings for each shift within the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Bookings by Shift** from the Print menu.

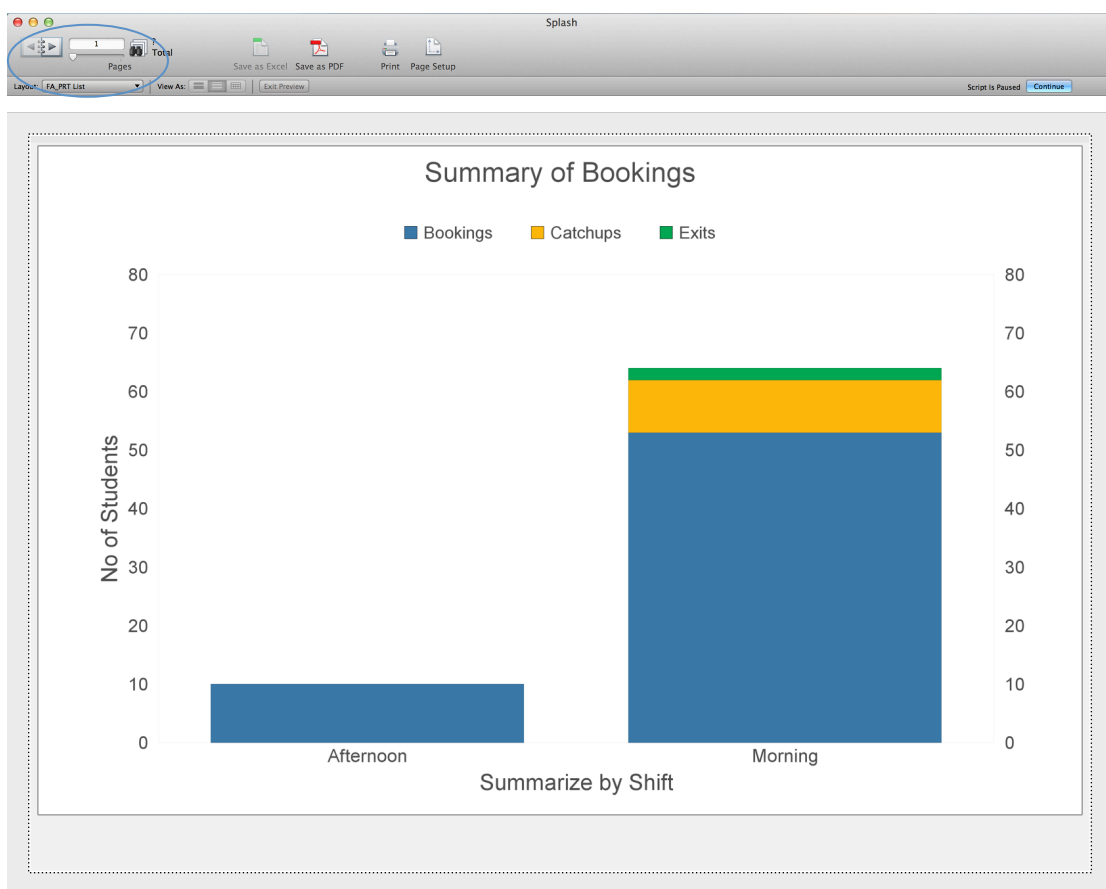
Produce Summary Report

Specify Report Format

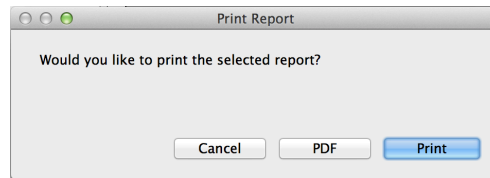
Step 1 : Choose Existing Report Format
 Report Name: Summary of Bookings

Step 2: Choose/Update Report Summary Groups
 Group 1: Summarize by Shift

4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
 Step 1 = Summary of Bookings
 Step 2 = Group 1 set to Summarize by Shift
 Step 3 = Report Name set to Summary by Shift.
6. Amend the grouping options at Step 2 if required and click the **OK** button.
7. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



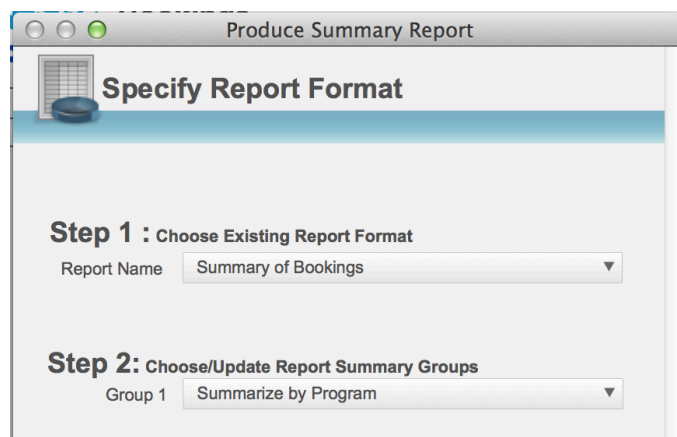
8. The **Print Report** dialog will be displayed on your screen.



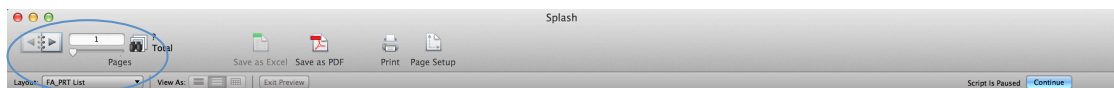
Printing a Chart Showing Bookings by Program

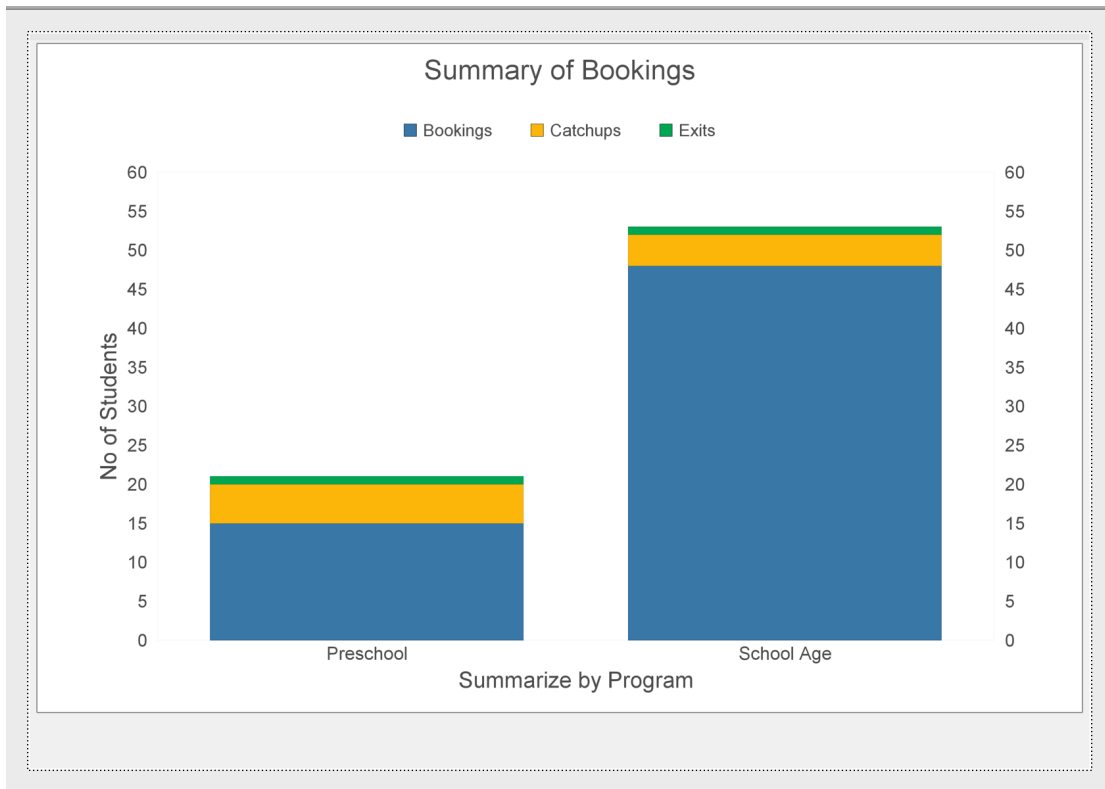
This report displays as a graph; it shows the number of bookings for each program within the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Bookings by Program** from the Print menu.

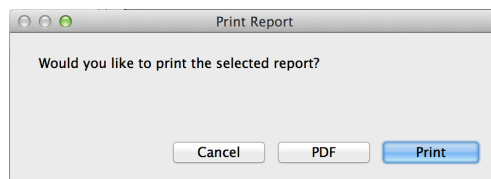


4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary of Bookings
Step 2 = Group 1 set to Summarize by Shift
Step 3 = Report Name set to Summary by Shift.
6. Amend the grouping options at Step 2 if required and click the **OK** button.
7. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.





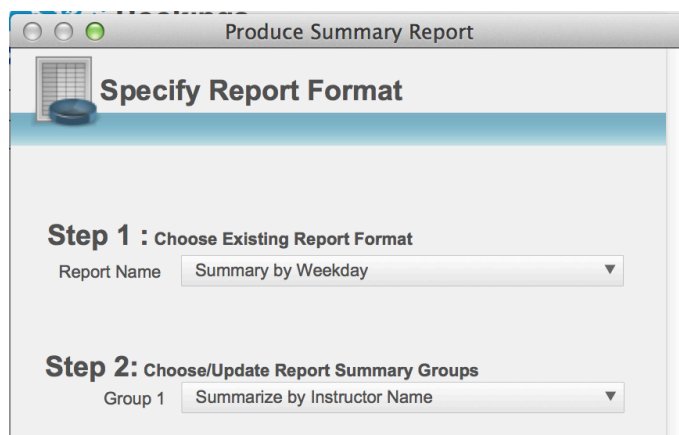
8. The **Print Report** dialog will be displayed on your screen.



Printing a Chart Showing Bookings by Weekday and Instructor

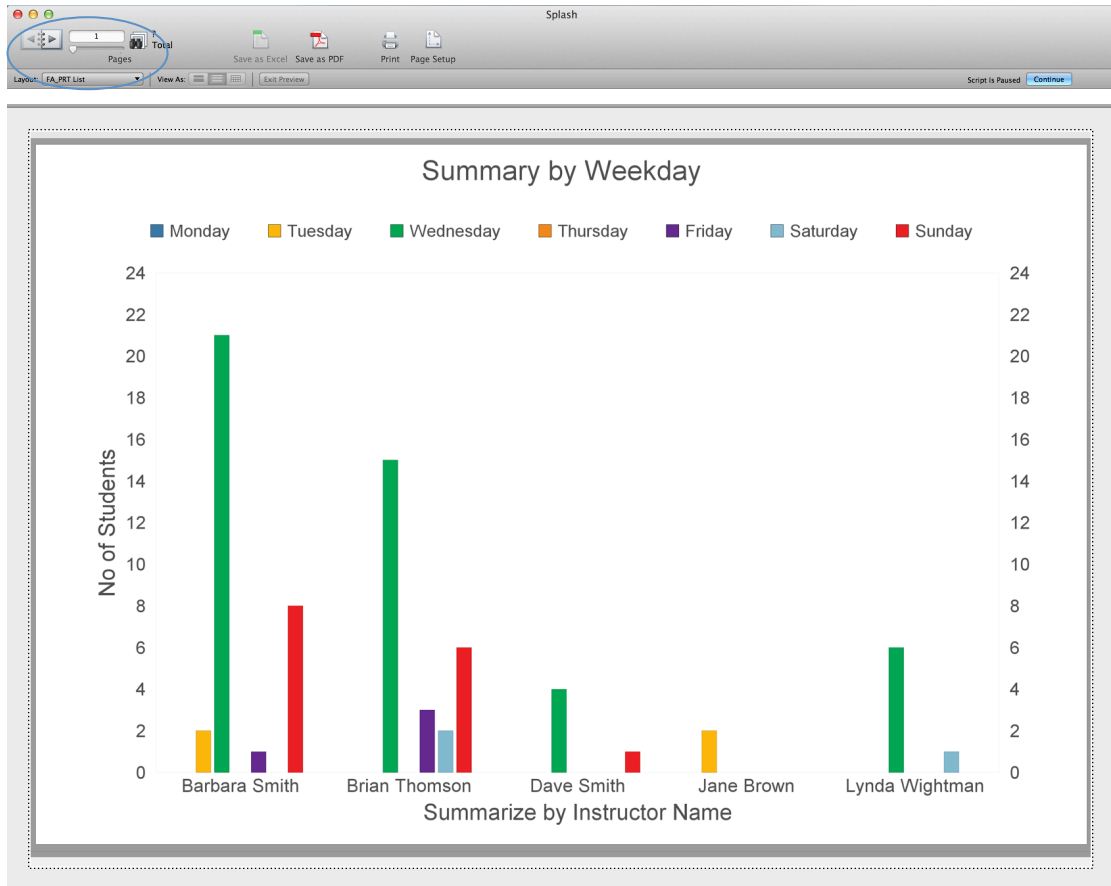
This report displays as a graph; it shows the number of bookings for each instructor within each weekday for the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Bookings by Weekday and Instructor** from the Print menu.

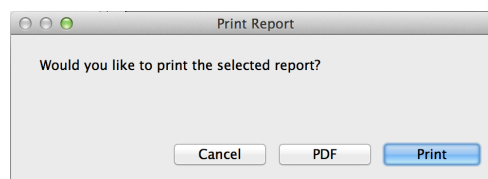


4. The Produce Summary Report dialog will be displayed on your screen.

5. Default data will be set at each of the three steps.
 Step 1 = Summary by Weekday
 Step 2 = Group 1 set to Summarize by Instructor Name
 Step 3 = Report Name set to Summary by Weekday.
6. Amend the grouping options at Step 2 if required and click the **OK** button.
7. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



8. The **Print Report** dialog will be displayed on your screen.



Printing a Chart Showing Bookings by Weekday and Class Name

This report displays as a graph; it shows the number of bookings for each class name within each weekday for the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Bookings by Weekday and Class Name** from the Print menu.

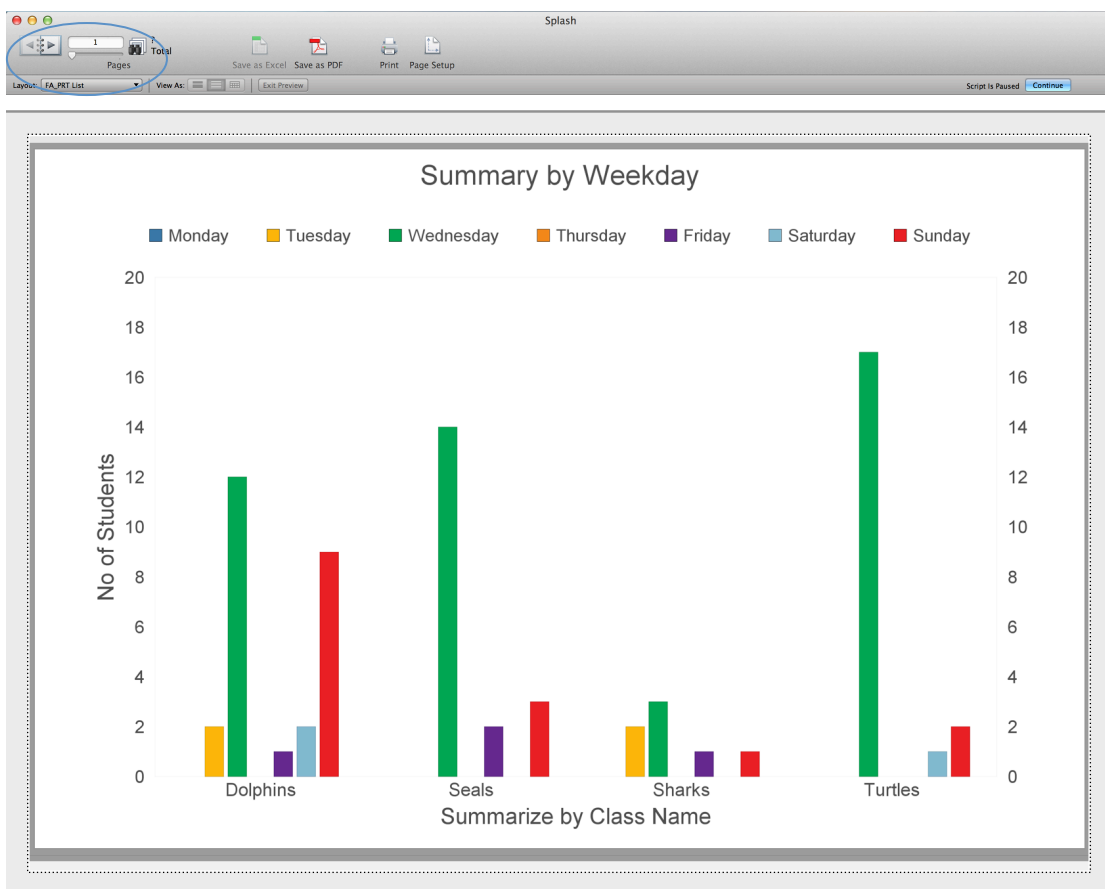
Produce Summary Report

Specify Report Format

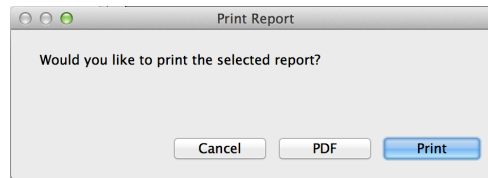
Step 1 : Choose Existing Report Format
 Report Name: Summary by Weekday

Step 2: Choose/Update Report Summary Groups
 Group 1: Summarize by Class Name

4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
 Step 1 = Summary by Weekday
 Step 2 = Group 1 set to Summarize by Class Name
 Step 3 = Report Name set to Summary by Weekday.
6. Amend the grouping options at Step 2 if required and click the **OK** button.
7. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



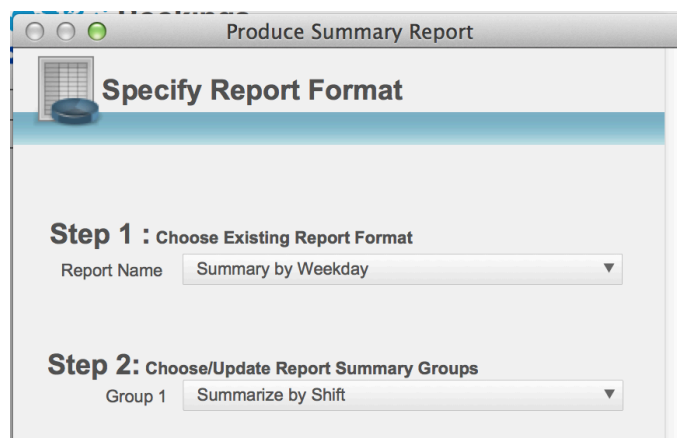
8. The **Print Report** dialog will be displayed on your screen.



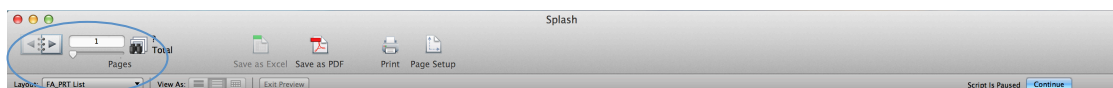
Printing a Chart Showing Bookings by Weekday and Shift

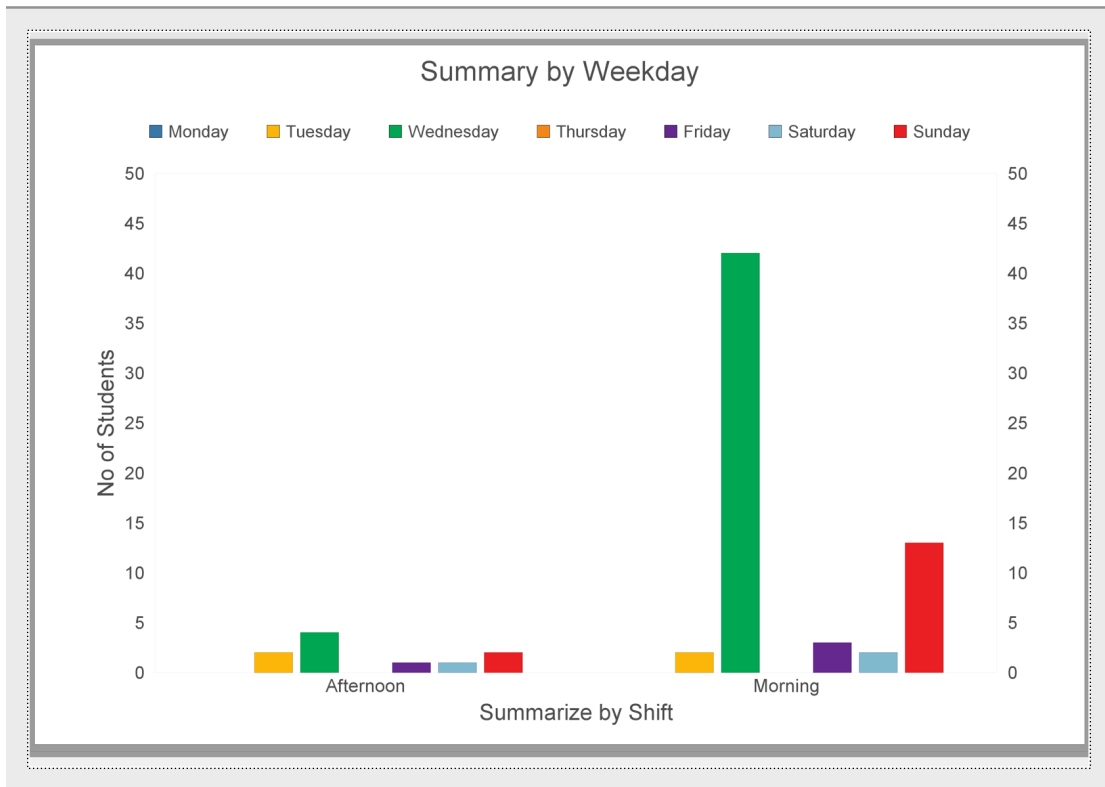
This report displays as a graph; it shows the number of bookings for each shift within each weekday for the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Bookings by Weekday and Shift** from the Print menu.

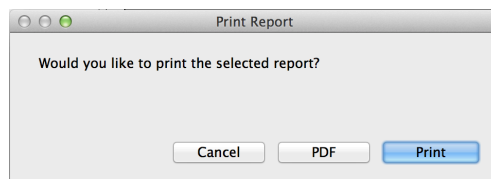


4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary by Weekday
Step 2 = Group 1 set to Summarize by Shift
Step 3 = Report Name set to Summary by Weekday.
6. Amend the grouping options at Step 2 if required and click the **OK** button.
7. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.





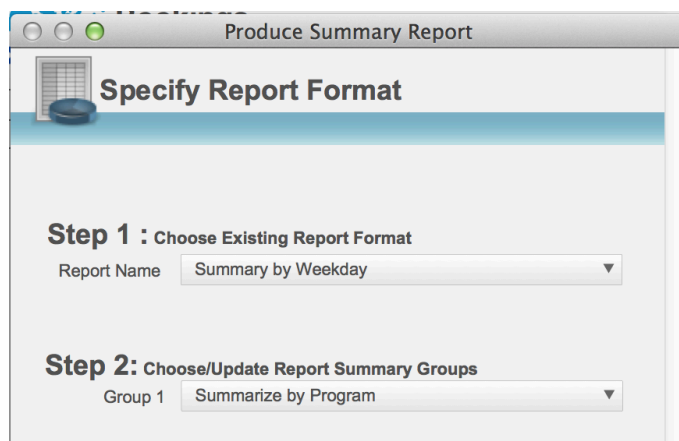
8. The **Print Report** dialog will be displayed on your screen.



Printing a Chart Showing Bookings by Weekday and Program

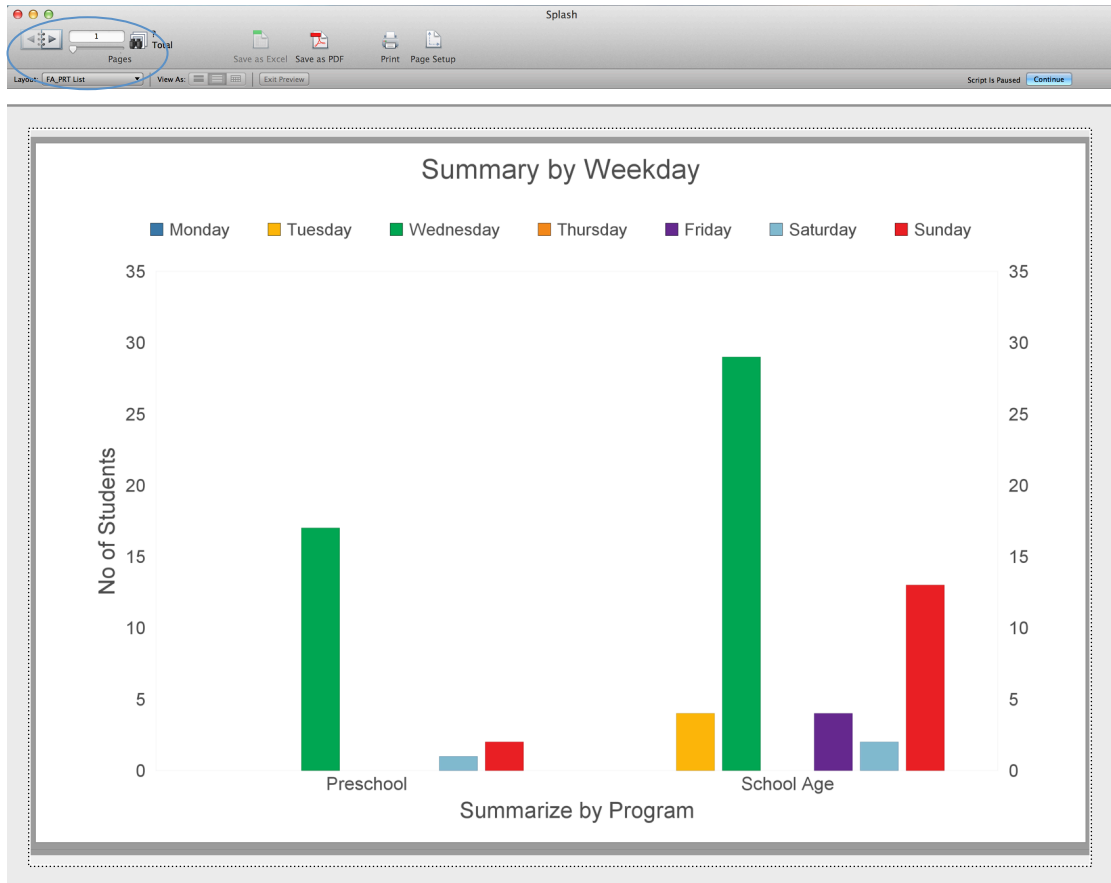
This report displays as a graph; it shows the number of bookings for each program within each weekday for the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Bookings by Weekday and Program** from the Print menu.

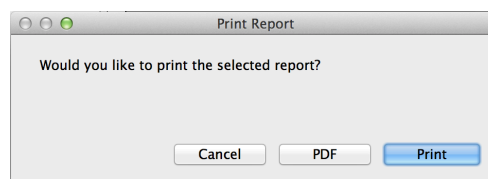


4. The Produce Summary Report dialog will be displayed on your screen.

5. Default data will be set at each of the three steps.
 Step 1 = Summary by Weekday
 Step 2 = Group 1 set to Summarize by Program
 Step 3 = Report Name set to Summary by Weekday.
6. Amend the grouping options at Step 2 if required and click the **OK** button.
7. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



8. The **Print Report** dialog will be displayed on your screen.



Processing Direct Debit Payments

Splash direct debit payments are processed through the clearing house Merchant Warrior. In order to process payments you must first set up an account with Merchant Warrior. Go to www.merchantwarrior.com to create your account.

Following setup of your Merchant Warrior account you must record the client's bank account details in Splash for any family you wish to include in your DD schedule. The bookings you wish to process by direct debit must have "Yes" specified in the direct debit field.

Direct debit processing is a precise operation that requires specific information exists in a number of locations as outlined below:

School Details - Enter your Merchant Warrior account details

The screenshot shows the 'School Details' form in the Splash application. The 'Accounts Contact' section is highlighted with a blue arrow pointing to the 'Test Mode (Select if Yes)' checkbox, which is circled in red. The form includes fields for School Name, Street Address, Post Address, Contact Details, and Accounts Contact. The 'Test Mode' checkbox is currently checked.

NB: Direct debit payments cannot be processed while the system is in test mode.

Family File - Enter bank details on the family file, set Payment by Direct Debit to Yes. You must also complete the family contact name and address details (including postcode).

The screenshot shows the 'Family File' form. The 'Payment by Direct Debit' field is set to 'Yes'. The 'Bank Account Number' field is masked with '#' symbols. The form includes fields for Referred From, Exit Reason, Alert Message, Preferred Client, Discount Rate, Type, and Bank Account Number.

Once entered the bank account will be represented by # symbols

Booking Record – Payment by Direct Debit must be set to Yes, Next Payment Due amount must be defined.

The screenshot shows the 'Bookings' window in the Splash software. On the left is a list of students. The main area displays details for a booking for David King, Student ID 35. The 'Attendance and Payments' tab is active, showing a calendar of attendance from 9/2/2014 to 6/4/2014. Below the calendar, the 'Payments by Direct Debit' checkbox is checked, and the 'Next Payment Due' field is highlighted with a blue arrow. The 'Cost of Booking' section shows an initial cost of \$100.00 and a discount applied of \$10.00, resulting in a balance due of \$90.00. The 'Payments Received' section shows a payment of \$90.00 on 26/04/14.

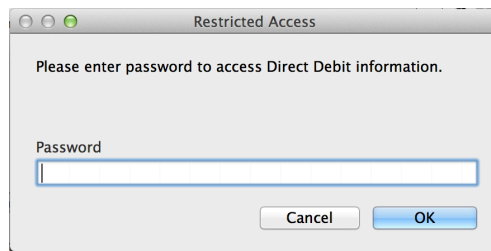
Additional documentation is available to support direct debit processing. The additional documentation guides you through monitoring the success (or otherwise) of each payment.

Defining a Family for Direct Debit

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. When the correct family screen click once on the comments tab card.

The screenshot shows the 'Families' window in the Splash software. On the left is a list of families. The main area displays details for the Smith family, Family ID 2. The 'Comments' tab is selected, showing a list of family members: Sam Smith (8.2m), Nicholas Smith (8.2m), and Jacob Smith (9.2m). The 'Primary Contact' section shows 'Referred From' as 'School' and 'Exit Reason' as 'Referral Family (if applicable)'. The 'Alert Message' field is empty. The 'Bank Account Number' is masked with asterisks. The 'Total Enrolments' section shows a list of bookings for the family members, including dates, times, and locations.

3. Change Payment by Direct Debit to Yes.
4. The Restricted Access dialog will be displayed on your screen. Re-enter your login password and click OK to continue.



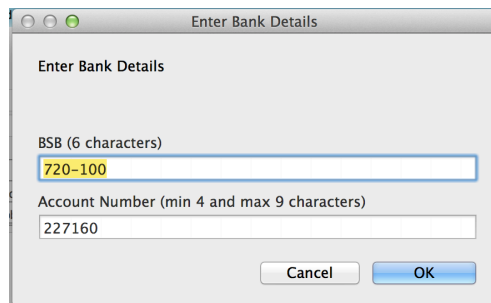
Restricted Access

Please enter password to access Direct Debit information.

Password

Cancel OK

- The Enter Bank Details dialog box will be displayed on your screen. You must enter both the BSB and the Account Number in the dialog box that is displayed. Follow the onscreen prompt for the number of characters in each field.



Enter Bank Details

BSB (6 characters)

720-100

Account Number (min 4 and max 9 characters)

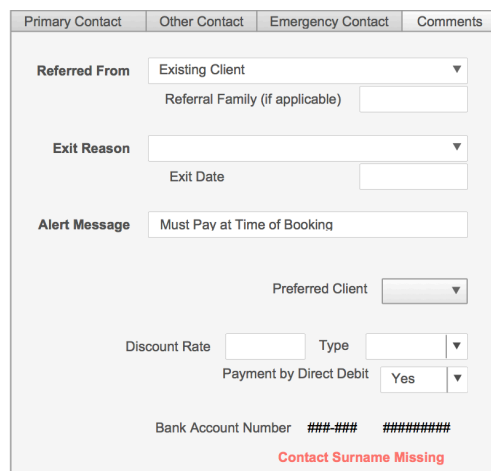
227160

Cancel OK

- Click OK to save the bank details and return to the family file.

Locating Family Direct Debit Errors

When defining a family for direct debit key pieces of information must exist on the family file. The file must contain the full name of the contact, address details (incl. postcode), and a valid bank account number. If any of the above information is missing an error message will be displayed on the family file.



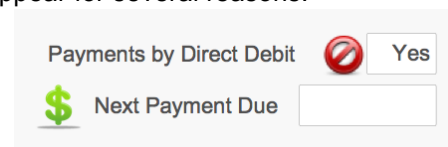
Primary Contact	Other Contact	Emergency Contact	Comments
<p>Referred From Existing Client</p> <p>Referral Family (if applicable)</p> <p>Exit Reason</p> <p>Exit Date</p> <p>Alert Message Must Pay at Time of Booking</p> <p>Preferred Client</p> <p>Discount Rate Type</p> <p>Payment by Direct Debit Yes</p> <p>Bank Account Number ###-###-#####</p> <p>Contact Surname Missing</p>			

Defining a Booking for Direct Debit

Direct debit information for a booking is copied from the family file. Whether a booking will be included in a direct debit schedule is based simply on whether the Direct Debit field contains "Yes".

If insufficient information has been entered to enable the direct debit to be processed a warning symbol will appear on the page. This symbol may appear for several reasons.

- Next payment amount is empty
- Next payment amount exceeds the amount due
- Incomplete details on the family record



Payments by Direct Debit Yes

Next Payment Due

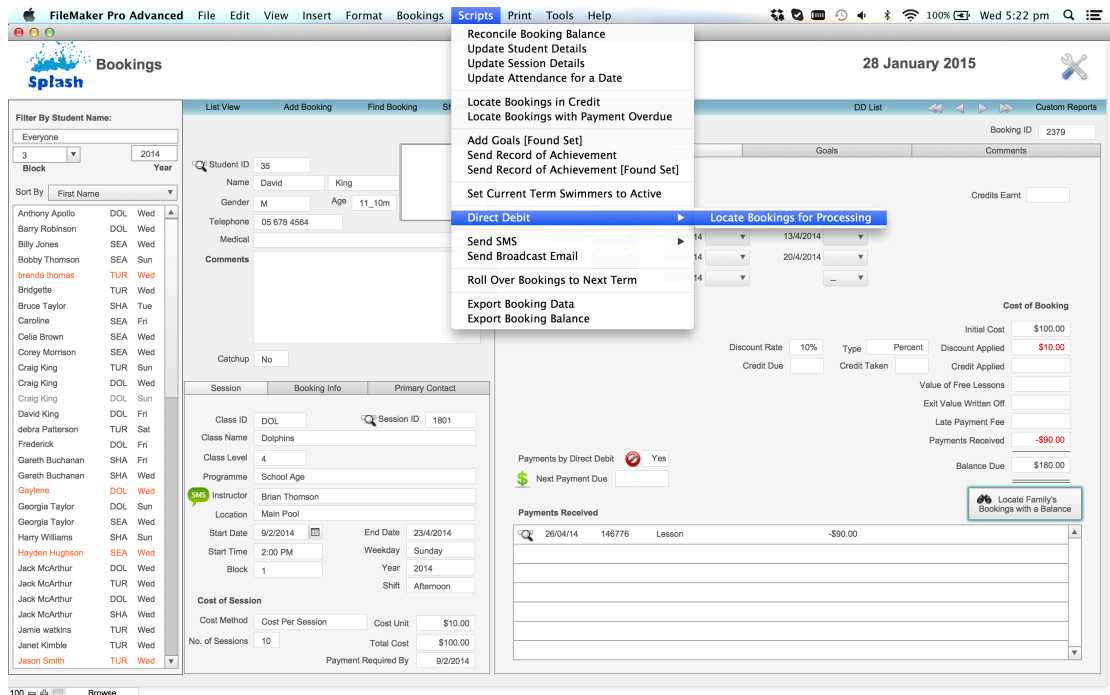
NB: Place your cursor over the warning symbol to see source of the error.

Locating Payments for Direct Debit Processing

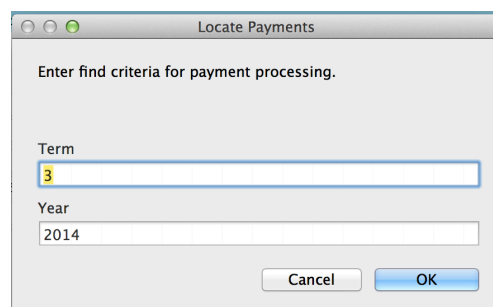
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



3. The Booking data entry screen will be displayed.
4. Choose **Direct Debit... Locate Bookings for Processing** from the scripts menu.



5. The Locate Payments dialog will be displayed on your screen. Enter the term and year for processing. Click the OK button.



6. Splash will locate all bookings for the selected term which have an outstanding balance and are eligible for processing. The list will be displayed on your screen.

ID	Student Name	Age	Class Name	Weekday	Start	Payment by DD	DD Amount	Block	Year	Balance Due	DD Processed	DD Resp
93	Sandra Patterson	3_2m	Sharks	Tuesday	8/7/2014	Yes	\$9.00	3	2014	\$27.00	29/10/2014 5:25:3.00pm	Transaction Success
33	Caroline Thomson	11_1m	Seals	Friday	11/7/2014	Yes	\$9.00	3	2014	\$72.00	29/10/2014 5:25:3.00pm	Transaction Success
158	simon thomas	4_8m	Seals	Friday	11/7/2014	Yes	\$9.00	3	2014	\$72.00	Contact Surname Missing	Transaction Success
77	Jessica Sinclair	10_7m	Dolphins	Saturday	12/7/2014	Yes	\$10.00	3	2014	\$81.00	City Missing	MWE Validation em
71	Georgia Taylor	9_2m	Dolphins	Sunday	13/7/2014	Yes	\$9.00	3	2014	\$54.00	29/10/2014 5:25:9.00pm	Transaction Success
138	Craig King	6_2m	Turtles	Sunday	13/7/2014	Yes	\$13.50	3	2014	\$121.50	29/10/2014 12:00:0.00am	Transaction Success
37	Celia Brown	13_5m	Seals	Wednesday	9/7/2014	Yes	\$9.00	3	2014	\$81.00	29/10/2014 12:00:0.00am	Transaction Success
139	Anthony Apollo	6_7m	Dolphins	Wednesday	9/7/2014	Yes	\$9.00	3	2014	\$81.00	29/10/2014 12:00:0.00am	Transaction Success
151	Mary Brown	4_8m	Seals	Wednesday	9/7/2014	Yes	\$9.00	3	2014	\$81.00	29/10/2014 12:00:0.00am	Transaction Success
164	Billy Jones	2_4m	Seals	Wednesday	9/7/2014	Yes	\$9.00	3	2014	\$81.00	29/10/2014 12:00:0.00am	Transaction Success
65	William Jessop	13_1m	Turtles	Wednesday	9/7/2014	Yes	\$13.50	3	2014	\$121.50	29/10/2014 12:00:0.00am	Transaction Success
165	Joanne Jones	4_5m	Seals	Sunday	13/7/2014	Yes	\$9.00	3	2014	\$81.00	29/10/2014 12:00:0.00am	Transaction Success

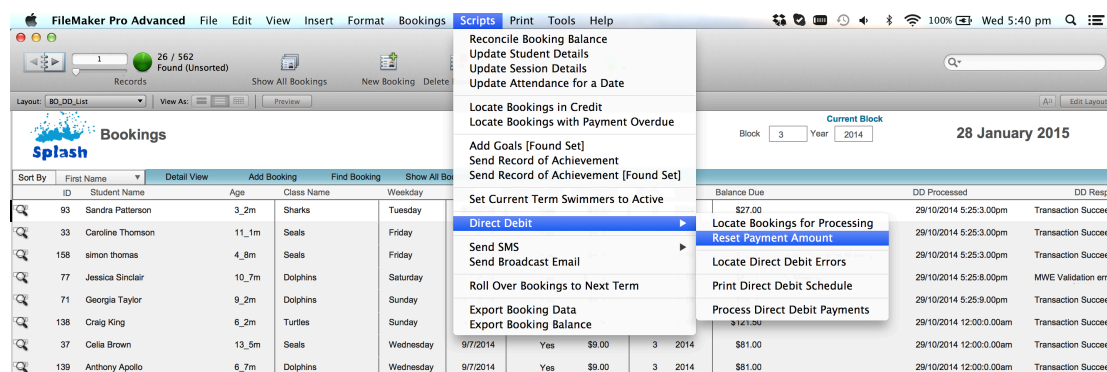
Resetting the Next Payment Amount

The default payment amount should be displayed for each of the bookings you have located. If however you want to confirm/update the amount to be processed simply run this command.

This command forces Splash to review each payment amount to ensure it does not exceed either your default amount or the total amount due on the booking.

It is recommended you run this script after locating bookings for processing and before actually processing the payments.

1. Ensure the Direct Debit list is displayed on your screen (described above Locating Payments for Direct Debit Processing).
2. The list of bookings for processing will be displayed on your screen.
3. Choose **Direct Debit... Reset Payment Amount** from the scripts menu.

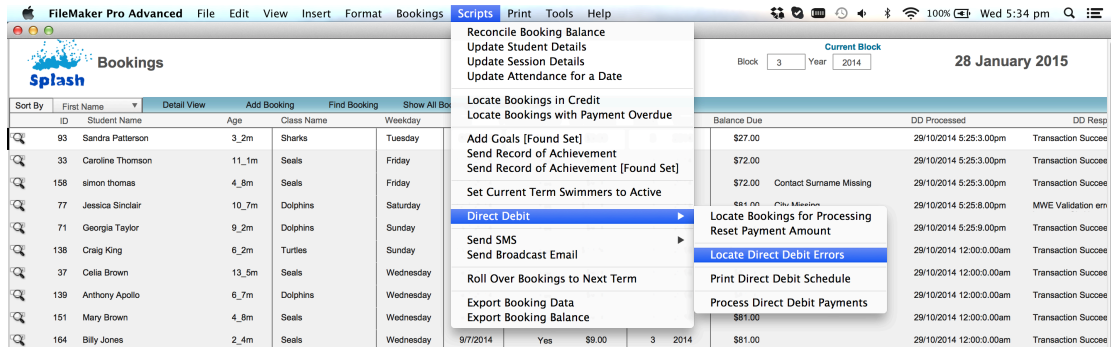


4. Splash will now process your request.

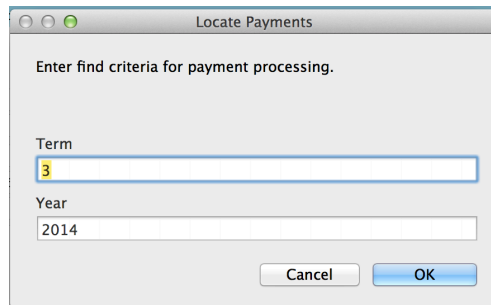
Locate Bookings With Direct Debit Errors

Perform this function in order to locate any bookings eligible for direct debit processing which are known to contain errors.

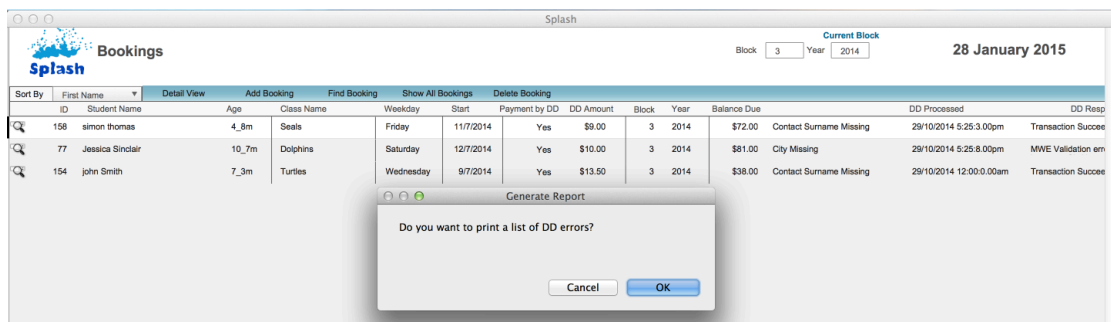
1. Ensure the Direct Debit list is displayed on your screen (described above Locating Payments for Direct Debit Processing).
2. Choose **Direct Debit... Locate Direct Debit Errors** from the scripts menu.



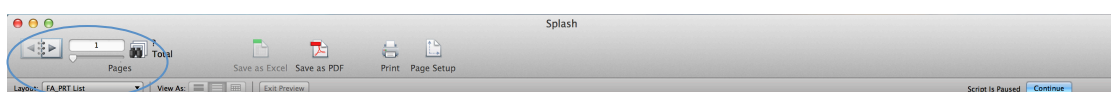
3. The Locate Payments dialog will be displayed on your screen. Enter the term and year for processing. Click the OK button.



4. The list of bookings with errors will be displayed on your screen. You will be asked whether you would like to print a list of direct debit errors.

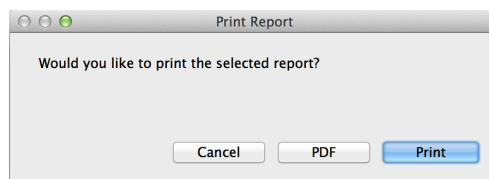


5. Click OK to preview the report or Cancel to return to the list of bookings.
6. If you have selected OK (above) the report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



Bookings - Direct Debit Payment Summary				
Schedule as at 28/1/2015				
		DD Amt	Balance	
Sinclair (Linley Sinclair)				
Jessica Sinclair	Dolphins	\$10.00	\$81.00	City Missing
Smith (Daniel)				
john Smith	Turtles	\$13.50	\$38.00	Contact Surname Missing
thomas (janice)				
simon thomas	Seals	\$9.00	\$72.00	Contact Surname Missing
Total Due as at 28/1/2015		\$32.50		

- The **Print Report** dialog will be displayed on your screen.



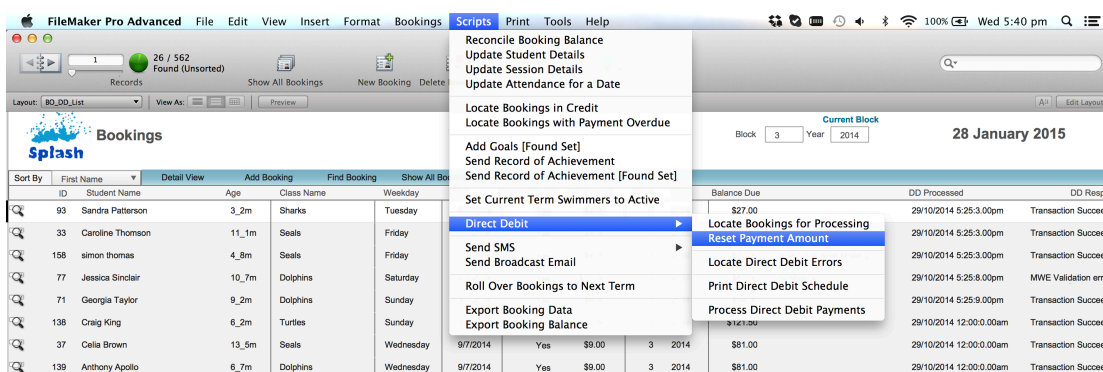
Resetting the Next Payment Amount

The default payment amount should have already been set for each of the bookings you have located. If however you want to confirm the amount to be processed simply run this command.

This command forces Splash to review each payment amount to ensure it does not exceed your default amount or exceed the total amount due on the booking.

It is recommended you run this script after locating bookings for processing and before actually processing the payments.

- Ensure the Direct Debit list is displayed on your screen (described above Locating Payments for Direct Debit Processing).
- The list of bookings for processing will be displayed on your screen.
- Choose **Direct Debit... Reset Payment Amount** from the scripts menu.



- Splash will now process your request.

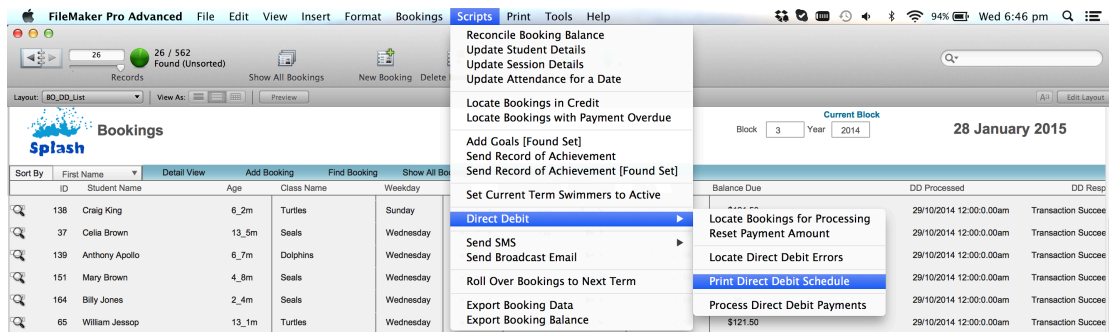
Printing the Direct Debit Schedule

When all payments have been finalised you may wish to print a list of the payments about to be processed. The list can be either printed or saved as a PDF.

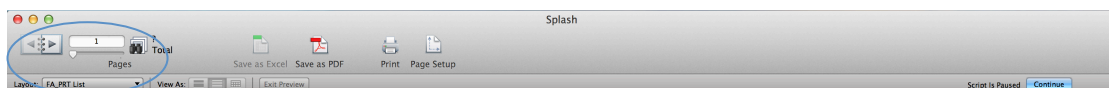
1. Click once on the Splash icon on the top left corner of your screen.
2. Select the Booking icon



3. The Booking data entry screen will be displayed.
4. Choose **Direct Debit... Locate Bookings for Processing** from the scripts menu.
5. The Locate Payments dialog will be displayed on your screen. Enter the term and year for processing. Click the OK button.
6. The list of bookings for processing will be displayed on your screen.
7. Choose **Direct Debit... Print Direct Debit Schedule** from the scripts menu.



8. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.

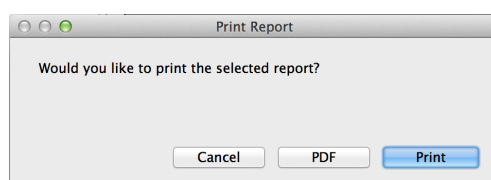


Bookings - Direct Debit Payment Summary

Schedule as at 28/1/2015

						Amount	Balance
Apollo (Martha Apollo)							
Anthony Apollo	Dolphins	Wed	Block: 3	2014		\$9.00	\$81.00
Brown (Sam Brown)							
Celia Brown	Seals	Wed	Block: 3	2014		\$9.00	\$81.00
Brown (Peter Brown)							
Mary Brown	Seals	Wed	Block: 3	2014		\$9.00	\$81.00
Buchanan (Debbie Buchanan)							
Frederick Buchanan	Dolphins	Fri	Block: 3	2014		\$9.00	\$79.00
Hughson (Ngairé Hughson)							
Stephanie Hughson	Dolphins	Wed	Block: 3	2014		\$9.00	\$81.00
Jessop (Tony Jessop)							
William Jessop	Turtles	Wed	Block: 3	2014		\$13.50	\$121.50
Jones (David Jones)							
Billy Jones	Seals	Wed	Block: 3	2014		\$9.00	\$81.00
Joanne Jones	Seals	Sun	Block: 3	2014		\$9.00	\$81.00

9. The **Print Report** dialog will be displayed on your screen.



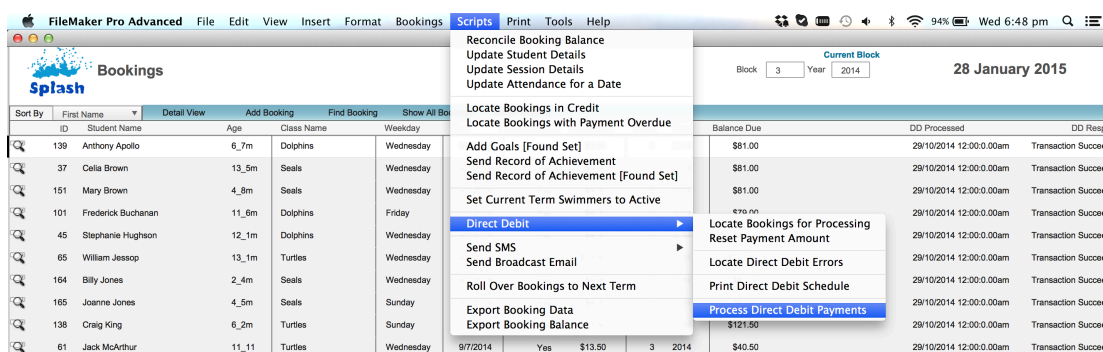
Processing Your Direct Debit Payments

When all payments have been checked and errors removed you are ready to process your direct debit payments.

1. Click once on the Splash icon on the top left corner of your screen.
2. Select the Booking icon



3. The Booking data entry screen will be displayed.
4. Choose **Direct Debit... Locate Bookings for Processing** from the scripts menu.
5. The Locate Payments dialog will be displayed on your screen. Enter the term and year for processing. Click the OK button.
6. The list of bookings for processing will be displayed on your screen.
7. Choose **Direct Debit... Process Direct Debit Payments** from the scripts menu.



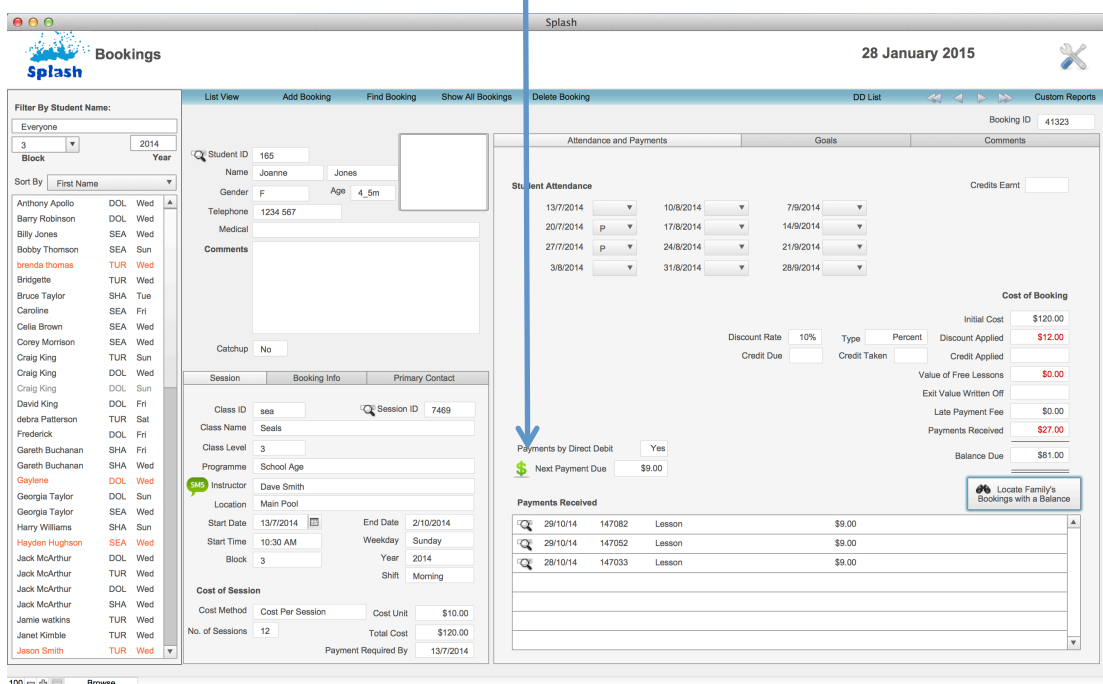
8. Payments will be processed for all bookings listed. Payments will be listed within the payment detail portal for each individual booking. All direct debits can be reviewed in the POS system.

NB: Remember to remove the DD test mode selection before initiating this command.

Processing a Single Direct Debit Payment

Use this command to process a single direct debit payment. It may be required because a single payment has failed, or may be required because you missed a family in the original direct debit run.

1. Use the **Finding a Booking** function to locate the booking record you wish to process.
2. When the correct family screen click green dollar sign to the left of the direct debit details.



Understanding the Diary

The Swim School Diary provides access to most features required in the day-to-day operation of the Splash system. It enables you to display the sessions for a selected block along with the related bookings. Inside the diary you have the ability to update attendance, update achievements, receive payments, and transfer students from one session to another.

Swim School Diary

This format provides the flexibility of being able to display all sessions for a defined weekday within a block in a specified year. You may also refine the list by selecting up to three class types.

The screenshot shows the 'Swim School Diary' application window. The top bar displays the date '29 January 2015' and a 'Login New User' button. The left sidebar contains filters for 'Weekday' (Sunday), 'Block' (3), and 'Year' (2014). The main area is titled 'Turtles @ 9:30 AM on Sunday with Brian Thomson'. It features a 'Bookings' tab with a list of students and their details, including 'Craig King' and 'Sally Anderson'. The 'Waiting List' tab is also visible. The bottom of the window has buttons for 'Add Booking', 'Add Catchup', and 'Add Waitlist'.

Daily Grid

Unlike the Swim School Diary, the grid displays classes for all days of the week in one view. Display a list of who is booked into a class by hovering your cursor above the class name or by clicking directly on the required class. This view is not available for printing.

The screenshot shows the 'Swim School Diary - Class Grid' application window. The top bar displays the date '2 February 2015' and a 'Login New User' button. The left sidebar contains filters for 'Start Time' (9:00 AM), 'Interval' (30 Mins), 'Block' (3), and 'Year' (2014). The main area is a grid showing sessions for all days of the week. A tooltip is visible over the 'Dolphins' session on Thursday, listing students: 'Sam Smith (7_5m)', 'Katharine O'Donnell (12_7m)', 'Jack MacArthur (11_5m)', and 'Tracey O'Donnell (11_4m)'. The bottom of the window has a 'Browse' button.

Class Grid

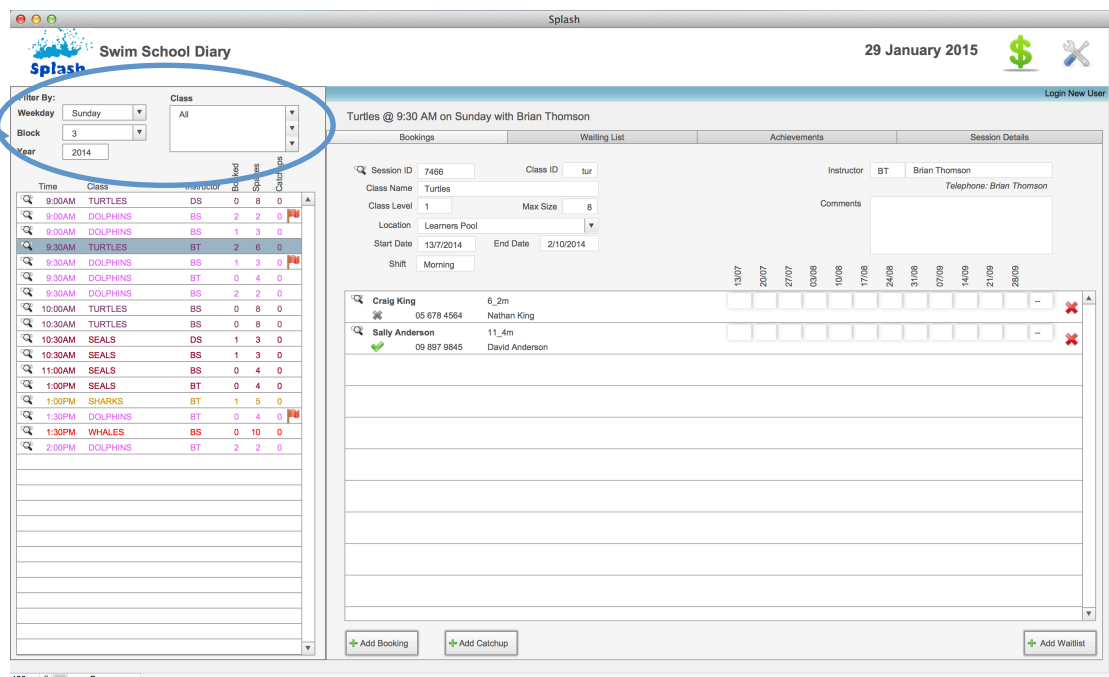
Unlike the other two options for display, the class grid displays all classes for a selected day and shift. This view shows the students booked into each session. Click once on the session display icon to display more detail for the selected class.

The screenshot displays the 'Splash Swim School Diary - Daily Grid' application. The main window shows a grid of sessions for Wednesday, 2 February 2015. The grid is organized by time slots (9:00AM, 9:30AM, 10:00AM, 1:30PM) and includes session details such as the instructor (e.g., Barbara Smith, Lynda Wightman), the pool (e.g., Learners Pool, Main Pool), and the number of students (e.g., 2, 4, 10). A 'Session Information' pop-up window is open, showing details for the 'Seals at 11:00 AM on Wednesday with Barbara Smith' session. This pop-up includes a table with columns for Student, Attendance, Achievements, and Waitlist. The table lists three students: Celia Brown, Mary Brown, and Nathan Solomon, along with their attendance status and achievements. The background grid shows other sessions for various animal-themed groups like Turtles, Dolphins, and Seals.

Student	Attendance	Achievements	Waitlist
Celia Brown	13_5m	04 564 3212 Sam Brown	
Mary Brown	4_8m	Peter Brown	
Nathan Solomon	1_7m	04 566 7865 Matthew Solomon	
William Jessop	13_1m	04 478 3215 Tony Jessop	

Working in the Swim School Diary

The content of Swim School Diary is based on three key fields; the day of the week, the block, and the year. In addition to these three fields you may also filter by Class.



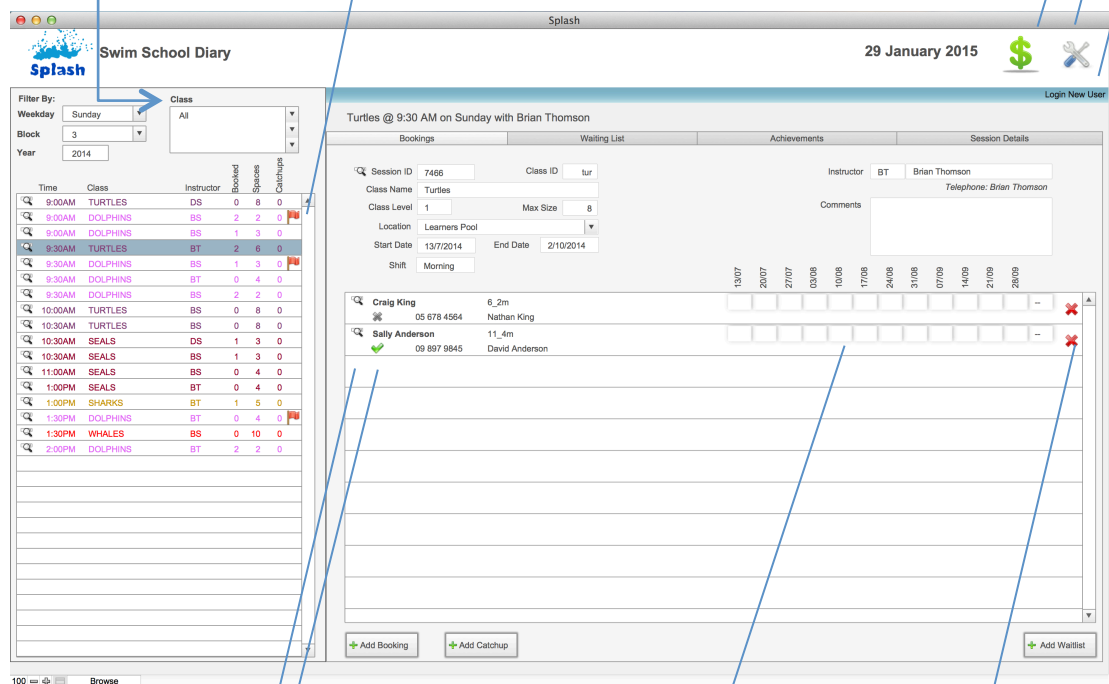
1. Select the **Weekday** you wish to view.
2. Select the **Block** you wish to view.
3. Select the **Year** you wish to view.
4. Select the Class(es) you wish to view (optional).

Login as a New User

View Preferences

Process Payment

Waitlist Flag



View Booking

Payment Status

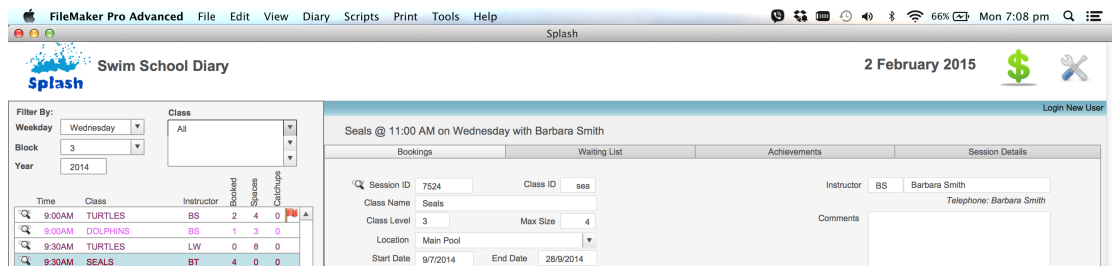
Record Attendance

Delete Booking

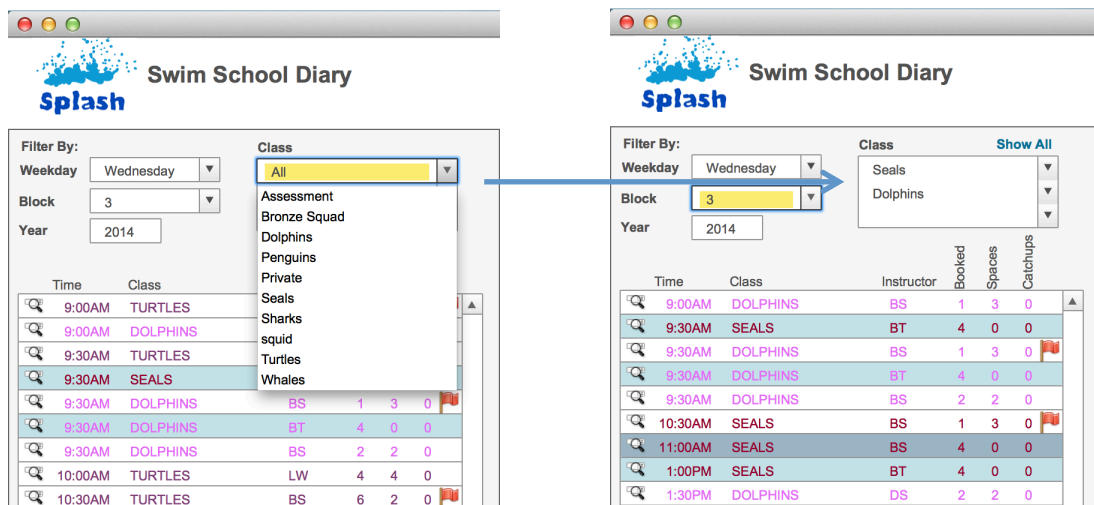
Filtering the Diary for Specific Classes

Rather than display the entire list of sessions you may elect to display sessions for a selected class type or multiple class types.

1. Ensure the Swim School Diary is displayed on your screen.
2. Select the required Day, Block and Year at the top of the diary screen.



3. Select the class you wish to display from the drop-down list provided.
4. Repeat step 3 until all the required classes are displayed.



Updating Session Details

Elements of the session can be updated within the diary. Updating session information here will automatically update the original session record and any active bookings.

Your ability to edit session information is dependant upon your access privileges. The Edit Session checkbox must be selected if you wish to update session information.

Viewing Bookings for a Session

1. Ensure the correct day, block and year are displayed at the top left of your screen.
2. Use the list on the left of your screen to click the class name for session you wish to display.
3. All bookings for the selected session will be displayed within the panel on the right of the screen.

The screenshot shows the 'Swim School Diary' application. On the left, under 'Filter By:', 'Weekday' is set to 'Sunday', 'Block' to '3', and 'Year' to '2014'. Below this is a list of classes. The class '9:30AM TURTLES' is selected, highlighted in blue. The right panel displays the session details for 'Turtles @ 9:30 AM on Sunday with Brian Thomson'. It includes fields for Session ID (7466), Class ID (tur), Instructor (BT), and Class Name (Turtles). Below these are tabs for 'Bookings', 'Waiting List', 'Achievements', and 'Session Details'. The 'Bookings' tab is active, showing a list of students and their booking status. The list includes 'Craig King' (6, 2m) and 'Sally Anderson' (11, 4m). At the bottom of the right panel are buttons for 'Add Booking', 'Add Catchup', and 'Add Waitlist'.

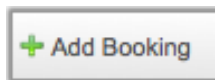
Entering a New Booking in the Diary

Bookings may be made within the diary or within the Sessions module. The diary provides a more efficient method of booking a student into a session.

1. Select the required Day, Block and Year at the top of the diary screen to locate the session you wish to book the student in to.
2. Use the list on the left of your screen to click the class name for the session you wish to book the student in to.

The screenshot shows the 'Swim School Diary' application. On the left, under 'Filter By:', 'Weekday' is set to 'Wednesday', 'Block' to '3', and 'Year' to '2014'. Below this is a list of classes. The class '9:30AM TURTLES' is selected, highlighted in blue. The right panel displays the session details for 'Turtles @ 9:30 AM on Wednesday with Brian Thomson'. It includes fields for Session ID (7466), Class ID (tur), Instructor (BT), and Class Name (Turtles). Below these are tabs for 'Bookings', 'Waiting List', 'Achievements', and 'Session Details'. The 'Bookings' tab is active, showing a list of students and their booking status. The list includes 'Craig King' (6, 2m) and 'Sally Anderson' (11, 4m). At the bottom of the right panel are buttons for 'Add Booking', 'Add Catchup', and 'Add Waitlist'.

3. All bookings for the selected session will be displayed on the right of your screen.



4. Click once on the **Add Booking** button to display the **Select a Student** dialog. Your cursor will be flashing in the filter field.

 A screenshot of a web application window titled "Select a Student". The window has a header bar with a user profile icon and the title "Select a Student". Below the header, there is a text input field with a magnifying glass icon and the label "Filter:". The main area of the window is a large, empty table with many rows and columns. At the bottom left, there is a "Cancel" button.

5. Begin typing either the student first name or last name (or part thereof) in the **Filter** box to display a list of all students who match the text entered. The list of students will be revised as you type.

 A screenshot of the "Select a Student" dialog box with the filter field containing the text "smi". The table below the filter field is populated with student records. The records are as follows:

Smith	Jacob	8_11m	0272222082	6A Erlestoke Crescent, Churton Park, Wellington	Seals
Smith	Jason	14_9m	0272222082	89 Roberta Road, Tawa 4008	Turtles
Smith	Jennifer	4_5m	0272222082	89 Roberta Road, Tawa 4008	Dolphins
Smith	John	7_4m	0272222082	89 Roberta Road, Tawa 4008	Turtles
Smith	Lucas	2_7m	478 4616	1243 Any Street, Wellington	Dolphins
Smith	Nicholas	7_11m	0272222082	6A Erlestoke Crescent, Churton Park, Wellington	Dolphins
Smith	Philip	2_10m	0272222082	89 Roberta Road, Tawa 4008	Turtles
Smith	Sam	7_11m	0272222082	6A Erlestoke Crescent, Churton Park, Wellington	Dolphins
Smith	William	4_8m	1234 567	123 Any St, Wellington	Sharks

6. Click once on the line that contains the name, age and address of the student you wish to add to the class.
7. The Enter New Booking dialog will be displayed on your screen. The student and session details will be completed for you.

Create New Booking

Enter New Booking Details

Must Pay at Time of Booking

Name: John Smith
 Telephone: 0272222082
 Address: 89 Roberta Road, Tawa 4008
 Age: 7_4m Gender: # Bookings This Block: 2

Session Details

Session ID: 7456 Class ID: DOL Block: 3
 Class Name: Dolphins Year: 2014
 Instructor: Barbara Smith Payment Required By: 26/10/2014
 Location: Main Pool
 Start Time: 09:30:00 No. of Sessions: 12
 Start Date: 26/10/2014 End Date: 2/12/2014 Weekday: Sunday

Cost of Lessons	Direct Debit	Comments
Cost Method: Cost Per Session @ \$10.00 Initial Cost: \$120.00		
Discount Rate: 10% Discount Type: Percent		Discount Applied: \$12.00
Credit Due: Credit Taken:		Credit Applied:
		Value of Free Lessons: \$0.00
Payment by Direct Debit:		Balance Due: \$108.00

Cancel Done

8. Confirm the **Start Date** and number of sessions for the new booking.
9. Customise any pricing if necessary and click the **Done** button to save the booking and return to the diary screen.

Understanding the Payment Status Icons

1. Select the required Day, Block and Year at the top of the diary screen.
2. Use the list on the left to click once on the session you wish to display.

Types of Booking Status Icons

When displayed in the diary, each student booking is preceded by a payment status icon. The icon has four states of display: Unpaid, Part Paid, Fully Paid, Credit.

1. Hover your cursor over the status icon to display the current balance of the booking.



Circle Status Icon – No payment received

[illegible]

Crossed Status Icon – Part payment received

	Jack McArthur	11_11	P	A	A							-	
	04 566 7894	Andrew McArthur											
	Ji Current Balance: \$40.5	6_5m	P									-	



Ticked Status Icon – Full payment received

	Janet Kimble	4_0m									
	04 4781646	Amanda Kimble									
	S... 1485511-0000 Current Balance: \$0	4_3m								--	
	04 911 6952	Malcolm Williams									



Negative Status Icon – Booking in credit

	Bridgette Robinson	14_0m	P						-	
	04 478 2491	Nicola Robinson								
	J... .. Current Balance: \$-2	11_11	P	A	A				-	
	04 000 7034	Andrew McArthur								

Viewing Booking Comments

Comments may be entered on any booking record. Comments are initially copied from the student file, however additional comments may be added. When comments are entered a small yellow note icon will appear below the students' name in the diary.

Displaying the Student Comments

When displayed in the diary, a student booking which contains comments is displayed with a yellow note icon.

1. Hover your cursor over the note to display the comments that have been entered.

[illegible]

Viewing Student Medical Conditions

Each student booking which contains a notified medical condition is displayed with the health symbol in the diary.



1. Hover your cursor over the health symbol to display a message containing the notified medical condition.

	Jack McArthur	11_11	P	A	A					-	
	04 566 7894	Andrew McArthur									
	Jamie Impaired Hearing	6_5m	P							-	

Viewing Other Bookings for a Student who has Multiple Bookings

Each student with multiple bookings in the current block will be displayed with an asterisk to the left of the student name when it is viewed in the diary. *

1. Hover your cursor over the asterisk to display a message containing a list of the other bookings for the selected student.

	* Sam Smith	7_10m							--	
	0272222082	Barbara Smith								
	Wed 9:30 AM nnell	11_8m							--	
	Wed 1:00 PM 4 478 5239	Patricia O'Donnell								


Updating Student Attendance (One Booking at a Time)

Student attendance can be updated from either the diary or within the booking record. When updating attendance manually the diary is the most efficient place to work. The following default attendance settings have been defined in Splash (go to Preferences to amend the list if required):

P = Present
A = Absent
NA = Notified Absence
C – Cancelled (by Swim School)
PH = Public Holiday

NB: Attendance reporting by default uses **P** to indicate a student was **Present** at a session. If you wish to use another code, simply update the preferences to reflect your choice.



1. Select the required Day, Block and Year at the top of the diary screen.
2. Use the list on the left of your screen to select the session you wish to update.



Swim School Diary

Splash

29 January 2015

Filter By:

Weekday Wednesday ▼

Block 3 ▼

Year 2014 ▼

Class

All ▼

Dolphins @ 9:30 AM on Wednesday with Brian Thomson

Bookings	Waiting List	Achievements	Session Details																																																																	
<p>Search ID 7514 Class ID dol</p> <p>Class Name Dolphins</p> <p>Instructor BT Brian Thomson</p> <p>Class Level 4 Max Size 4</p> <p>Location Main Pool Telephone: Brian Thomson</p> <p>Date Range: Start Date 9/7/2014 End Date 28/9/2014</p> <p>Shift Morning</p> <p>Comments <div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div></p>																																																																				
<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th>09/07</th> <th>16/07</th> <th>23/07</th> <th>30/07</th> <th>06/08</th> <th>13/08</th> <th>20/08</th> <th>27/08</th> <th>03/09</th> <th>10/09</th> <th>17/09</th> <th>24/09</th> </tr> </thead> <tbody> <tr> <td>Jack McArthur 📞 04 568 7894 Andrew McArthur</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>--</td><td>✖</td> </tr> <tr> <td>Katrina O'Donnell 📞 04 478 5239 Patricia O'Donnell</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>--</td><td>✖</td> </tr> <tr> <td>Sam Smith 📞 0272222082 Barbara Smith</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>--</td><td>✖</td> </tr> <tr> <td>Tracey O'Donnell 📞 04 428 6330 Suzette O'Donnell</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>--</td><td>✖</td> </tr> </tbody> </table>					09/07	16/07	23/07	30/07	06/08	13/08	20/08	27/08	03/09	10/09	17/09	24/09	Jack McArthur 📞 04 568 7894 Andrew McArthur											--	✖	Katrina O'Donnell 📞 04 478 5239 Patricia O'Donnell											--	✖	Sam Smith 📞 0272222082 Barbara Smith											--	✖	Tracey O'Donnell 📞 04 428 6330 Suzette O'Donnell											--	✖
	09/07	16/07	23/07	30/07	06/08	13/08	20/08	27/08	03/09	10/09	17/09	24/09																																																								
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Tracey O'Donnell 📞 04 428 6330 Suzette O'Donnell											--	✖																																																								

3. All bookings for the selected session will be displayed in the panel on the right of the screen.

Splash

Swim School Diary

29 January 2015

Filter By:

Weekday: Wednesday ▼
 Block: 3 ▼
 Year: 2014

Class: All ▼

Time	Class	Instructor	Bored	Spares	Cancellations
9:00AM	TURTLES	BS	1	5	0
9:00AM	DOLPHINS	BS	1	3	0
9:30AM	TURTLES	LW	0	8	0
9:30AM	SEALS	BT	4	0	0
9:30AM	DOLPHINS	BS	1	3	0
9:30AM	SEA SHARKS	DT	2	2	0
9:30AM	DOLPHINS	BS	2	2	0
10:00AM	TURTLES	LW	4	4	0
10:30AM	TURTLES	BS	6	2	0
10:30AM	SEALS	BS	1	3	0
11:00AM	SEALS	BS	4	0	0
1:00PM	SEALS	BT	4	0	0
1:00PM	SHARKS	BT	3	3	0
1:30PM	DOLPHINS	DS	2	2	0

Dolphins @ 9:30 AM on Wednesday with Brian Thomson

Bookings	Waiting List	Achievements	Session Details
Search ID 7514 Class ID dol			
Class Name Dolphins		Instructor BT Brian Thomson	
		Telephone: Brian Thomson	
Class Level 4 Max Size 4		Comments	
Location Main Pool ▼			
Start Date 9/7/2014 End Date 28/9/2014			
Shift Morning			

	09/07	16/07	23/07	30/07	06/08	13/08	20/08	27/08	03/09	10/09	17/09	24/09
Jack McArthur 	A	A								-		X
Katrine O'Donnell 			A	A						--		X
Sam Smith 			A	A						--		X
Tracy O'Donnell 			C	A						--		X

4. Update attendance by choosing the appropriate attendance code from the drop-down menu displayed for the required date.

NB: See the Bookings User Guide for instructions on updating attendance in bulk.

Booking a Catchup Lesson

Catchup lessons can only be created from the diary. Bookings can only be made in a session that has vacancies. If the class has future catchups scheduled (which makes the class full on those dates) you may be unable to enter additional bookings.

1. Select the required Day, Block and Year at the top of the diary screen to display the session you want to book the student in.
2. Use the panel on the left of your screen to select the session you would like to book a catchup lesson for.
3. All bookings for the selected session will be displayed in the panel on the right of your screen.

The screenshot shows the 'Swim School Diary' application. On the left, a filter panel allows selecting 'Wednesday', 'Block 3', and 'Year 2014'. A table lists sessions with columns for Time, Class, Instructor, Booked, Spaces, and Catchups. The 'Turtles @ 10:00 AM on Wednesday with Lynda Wightman' session is selected. The right panel shows details for this session, including Session ID (7520), Class ID (tur), Instructor (LW Lynda Wightman), and a list of students with their booking status for various dates. At the bottom, there are buttons for 'Add Booking', 'Add Catchup', and 'Add Waitlist'.

4. Click once on the **Add Catchup** button to display the **Select a Student** dialog.

The 'Select a Student' dialog box is shown. It has a search filter set to 'smith'. Below the filter, a table lists students with columns for Name, Address, and Class. The students listed are Jacob, Jason, Jennifer, John, Lucas, Nicholas, Phillip, Sam, and William, all with the 'Smith' surname. At the bottom, there is a 'Cancel' button.

5. Begin typing either the student first name or last name to display a list of all students with a matching name. The list will be revised as you type.

6. Click once on the line, which contains the student name, age, and address you wish to book the catchup for.
7. The Enter New Catchup Details dialog will be displayed on your screen. The student and session details will be completed for you.

The screenshot shows a software window titled "Create New Booking" containing a sub-dialog titled "Enter New Catchup Details". The dialog features a header with a user icon and a plus sign. Below the header, there are several input fields organized into sections. The first section contains personal details: Name (Jacob Smith), Telephone (0272222082), Address (6A Erlestoke Crescent, Churton Park, Wellington 4001), Age (8_10m), and Gender (Male). The second section, titled "Session Details", includes Session ID (7520), Class ID (tur), Block (3), Class Name (Turtles), Instructor (Lynda Wightman), Location (Learners Pool), Start Time (10:00:00), Start Date (24/9/2014), and Weekday (Wednesday). A "Comments" text area is located below these fields. At the bottom of the dialog are two buttons: "Cancel" and "Done".

8. Update the **Start Date** to display the date the catchup lesson is being taken.
9. Click the **Done** button to save the booking and return to the diary screen.

NB: An "Active" catchup lesson will appear in green text. A catchup is regarded as active if the date of the catchup is within 7 days of the current date. Students entered for catchup lessons will automatically appear on printed listings while they are active. The status of a catchup lesson will revert to "Exited" when outside the active timeframe. A past catchup is displayed in red text, while a future catchup is displayed in orange text.

Updating Student Achievements

Student achievements can be updated from either the diary, the booking record or from the iPad. Each row in the achievement portal contains four fields:

The Goal – displays a description of the goal a student is working towards.

Progress Status – contains a drop-down list of possible stages in respect to the swimmers progress towards the selected goal. The menu may be changed within your preferences.

Comments – a free text field that enables you to enter any comments about the students' progress towards the selected goal.

Date of Completion – the date of completion should be completed when a child has successfully demonstrated the assigned task.

1. Select the required Day, Block and Year at the top of the diary screen.
2. Use the list on the left of your screen to select the session you wish to update.
3. Click the achievement tabcard.

The screenshot shows the 'Splash Swim School Diary' interface. On the left, there's a sidebar with filters for 'Filter By: Weekday' (Wednesday), 'Block' (3), and 'Year' (2014). The main area displays 'Dolphins @ 9:30 AM on Sunday with Barbara Smith'. Below this, there's a table of 'Current Bookings' with columns for Name, Time, ID, and Level. The 'Achievements' tab is selected, showing a list of goals for Sarah Nightingale. The goals are: 1. Bubble and breathe 10 metres, 2. Kick on Back 10 metres, 3. Breaststroke Kick 5 metres, 4. Butterfly Arms 5 metres, and 5. Each goal has a 'Date Achieved' field and a red 'X' icon.

4. A list of all students in the selected session will be displayed on the top right of your screen.
5. Click once on each student name to display their progress towards goals..
6. Update assessment details for each goal as required.

This screenshot provides a closer look at the 'Achievements' tab. It shows the 'Current Bookings' table with three students: Lucas Smith, Sarah Nightingale, and Nicholas Smith. Below this, the 'Displaying Goals for: Sarah Nightingale' section shows a list of goals. The first goal, 'Bubble and breathe 10 metres', has a dropdown menu set to 'Learning'. The second goal, 'Kick on Back 10 metres', has a dropdown menu set to 'Mastered'. The third goal, 'Breaststroke Kick 5 metres', has a dropdown menu set to 'Learning'. Each goal has a 'Date Achieved' field and a red 'X' icon. A blue arrow points to the dropdown menu for the third goal.

Transferring the Student to Another Session

Use the transfer command to move a student from one session to another, this command should be used when you do not need to keep a record of the original booking. If you wish to keep a record of the original booking, use the Exit process and rebook the child in a new session.

1. Select the required Day, Block and Year at the top of the diary screen.
2. Use the list on the left of your screen to select the session you wish to update.
3. Locate the booking you wish to move.

The screenshot shows the 'Swim School Diary' application. On the left, there's a sidebar with filters for Weekday (Wednesday), Block (3), and Year (2014). Below this is a list of sessions with columns for Time, Class, Instructor, Booked, Spaces, and Catchups. The main area displays details for the 'Dolphins @ 9:30 AM on Sunday with Barbara Smith' session. It includes fields for Session ID (7527), Class ID (DOL), Instructor (BS Barbara Smith), Class Name (Dolphins), Class Level (4), Location (Main Pool), Start Date (13/7/2014), End Date (2/10/2014), and Shift (Morning). Below these fields is a calendar grid showing dates from 09/07 to 24/09. A student's booking record is visible, showing 'Sarah Nightingale' with a transfer button (a blue cross icon) next to it. A blue arrow points to this button.

Click the  button to move the student to another class

4. Click once on the transfer button displayed to the right of the booking record.
5. You will be asked to confirm your request to move the selected student to another class.

The dialog box asks: 'Are you sure you want to transfer Sarah Nightingale into another session?'. It has 'Cancel' and 'OK' buttons.

6. You will be prompted to select the session you would like to move the student into.

The dialog box asks: 'Please choose the session you want to transfer Sarah Nightingale in to.' It has 'Cancel' and 'OK' buttons.

7. Display the new session details on your screen by updating the Day, Block and Year settings at the top of the diary screen.
8. Click once on the session you wish to move the student in to.

Processing a Payment

1. Ensure the Diary is displayed on your screen.

2. Click the \$ button displayed on the top right of the window.



3. The POS interface will be displayed on your screen.

4. Use the panel on the top left of the screen to select the category which contains the button for the item being sold.

Common	Bathers	Accessories	Canteen	Misc
Passes	Goggles		Drinks	
			Ice Creams	

- Click once on the product you wish to include in your sale.

Lightly Sparkling				
Swim Nappy \$18.50				
Coffee \$4				
Missile Goggles \$30				
Chupa Chups				

- The item you have selected will move across to the Sale Item box

Invoice # 147177
POS 1
Shift: 2842

Date 3/02/2015
Time 1:31:44 PM

1

Missile Goggles
\$30

@

\$30.00 ea.
\$30.00

Del

Splash POS

Invoice # 147177
POS 1
Shift: 2842

Date 3/02/2015
Time 1:31:44 PM

Family ID

Common Bathers Accessories Canteen Misc

Passes Goggles Drinks Ice Creams

Lightly Sparkling

Swim Nappy \$18.50

Coffee \$4

Missile Goggles \$30

Chupa Chups

User card number

Member card number

Barcode

@

ea.

Del

7 8 9 NEXT

4 5 6 END

Set Qty 1 2 3

- 0 . Clr HOLD

DIARY List EoS

With Balance

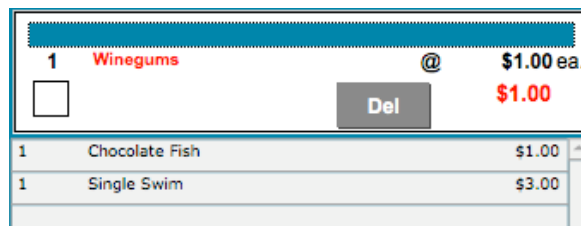
Zero Balance

100 = Browse

7. If you are selling multiple items of the same product click the **Clr** button, then select the actual quantity being sold.



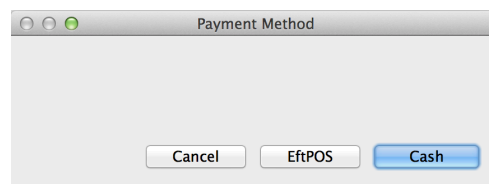
8. Repeat steps 4 through 7 until all products have been define for the sale.
9. As you enter additional items they will move further down the scree within the sale items area of the screen.



10. When all items have been defined, click the **END** button.



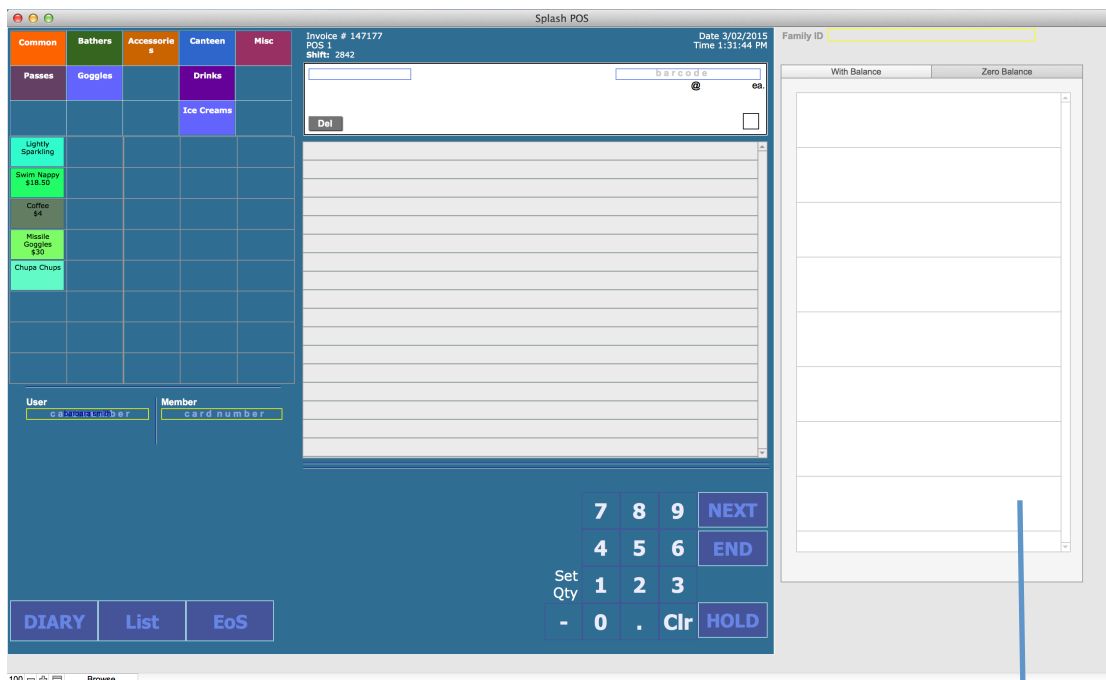
11. You will be asked to define the payment method for the selected sale. Choose EftPOS or Cash to complete the sale and return to the POS screen. Click Cancel to export the dialog box without completing the sale.



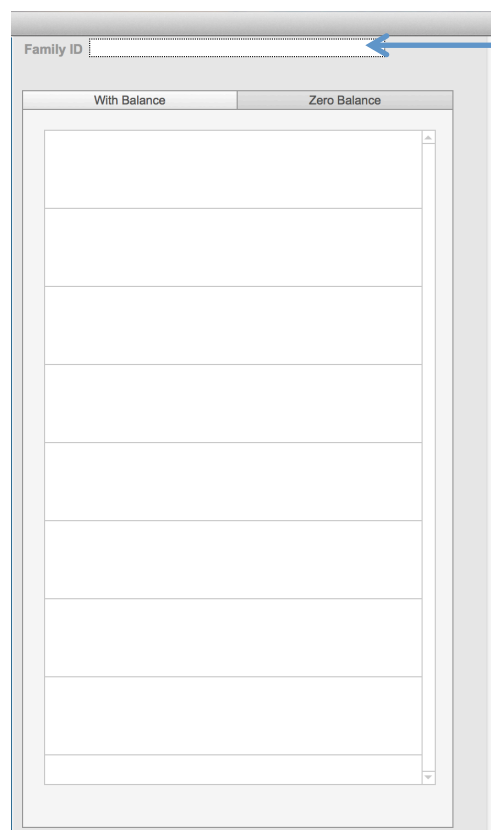
Entering a Quick Sale for a Booking

1. Ensure the Diary is displayed on your screen.

2. Click the \$ button displayed on the top right of the window.



3. The POS interface will be displayed on your screen.
4. Click once within the Family ID field on the right of the screen.



5. The Select Family dialog will be displayed on your screen. Enter the family name (or part thereof) in the filter field. The content of the list will be revised as you type.

Select a Family

Enter all or part of the family name to display fewer records.
Select the family name from the list below...

Filter:

Brown	Peter	234 any street, Wellington 4568	Mary
Brown	Sam	04 564 3212 345 Nowhere St, Brooklyn, Wellington 4009	Bobby, Celia, Amanda, paul

6. When you have identified the correct family simply click anywhere within the required row.

7. You will be returned to the POS screen, all existing bookings for the selected family will be displayed in the panel on the right of the screen.

Splash POS

Invoice # 147177
POS 1
Shift: 2842
Date: 3/02/2015
Time: 1:31:44 PM
Sam Brown

Family ID: 10
BROWN (Sam Brown)

With Balance Zero Balance

Celia Brown	Turtles - 9:30 AM Tue (Term 1 2014)	\$135.00
Amount	Percent	Disc 10%
Celia Brown	Turtles - 9:00 AM Sun (Term 2 2014)	\$94.50
Amount	Percent	Disc 10%
Celia Brown	Seals - 9:30 AM Mon (Term 1 2011)	\$90.00
Amount	Percent	Disc 10%
Celia Brown	Seals - 9:30 AM Mon (Term 1 2011)	\$90.00
Amount	Percent	Disc 10%
Celia Brown	Seals - 9:30 AM Mon (Term 2 2011)	\$90.00
Amount	Percent	Disc 10%
Celia Brown	Seals - 9:30 AM Mon (Term 2 2011)	\$90.00
Amount	Percent	Disc 10%
Celia Brown	Seals - 9:30 AM Mon (Term 2 2012)	\$90.00
Amount	Percent	Disc 10%
Celia Brown	Seals - 9:30 AM Mon (Term 2 2012)	\$90.00
Amount	Percent	Disc 10%
Celia Brown	Seals - 9:30 AM Mon (Term 3 2013)	\$90.00
Amount	Percent	Disc 10%

User: Member:

Missile Goggles \$30.00

7 8 9 NEXT
4 5 6 END
Set Qty 1 2 3
- 0 . Clr HOLD

DIARY List EoS

8. Click once on the booking you wish to enter a payment for. The booking details will be copied to the sale item area of the screen.

Splash POS

Invoice # 147177
POS 1
Shift: 2842
Date: 3/02/2015
Time: 1:31:44 PM
Sam Brown

Lesson

1 Celia Brown - Turtles - 9:30 AM Tue (Term 1 2014) @ \$135.00 ea. \$135.00

Del

9. Repeat step 9 until all bookings have been defined for the sale.

Splash POS

Invoice # 147177
POS 1
Shift: 2842
Date: 3/02/2015
Time: 1:31:44 PM
Sam Brown

Lesson

1 Celia Brown - Turtles - 9:00 AM Sun (Term 2 2014) @ \$94.50 ea. \$94.50

Del

1	Missile Goggles	\$30.00
1	Celia Brown - Turtles - 9:30 AM Tue (Term 1 2014)	\$135.00

10. When all items have been selected, click the Sale button.

11. You will be asked to define the payment method for the selected sale. Choose EftPOS or Cash to complete the sale and return to the POS screen.



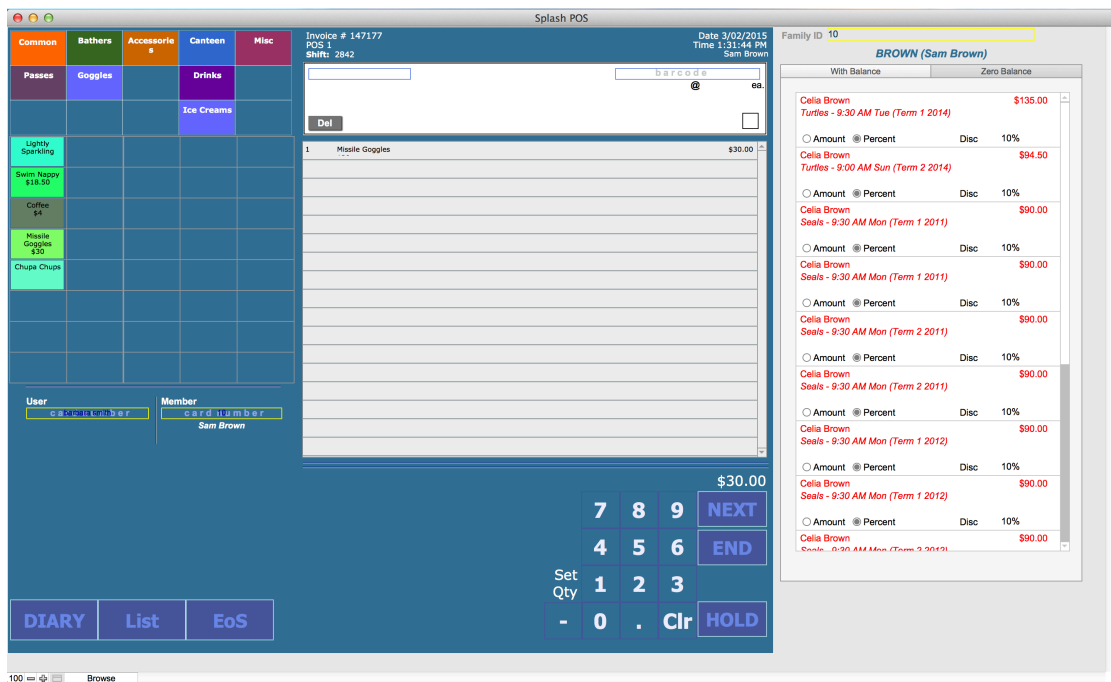
Defining Alternative Payment Methods

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the window.

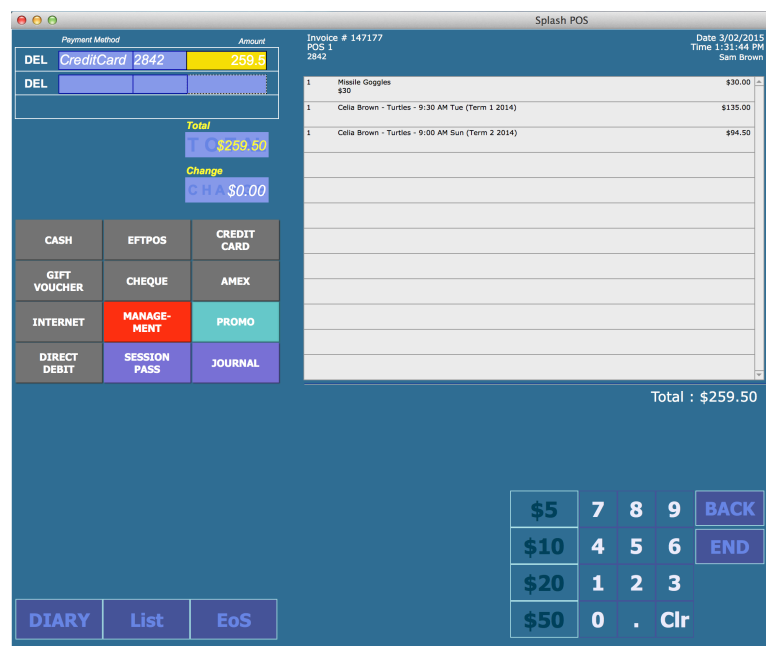


3. The POS interface will be displayed on your screen.
4. Click once in the Family ID field on the right of the screen.
5. The Select Family dialog will be displayed on your screen. Enter the family name (or part thereof) in the filter field. The content of the list will be revised as you type.

6. When you have identified the correct family simply click anywhere within the required row.
7. You will be returned to the POS screen, all existing bookings for the selected family will be displayed in the panel on the right of the screen. This area is displayed in two cards ; with balance and zero balance.



8. Click once on the booking you wish to process a payment for. The booking details will be copied to the sale item area of the screen.
9. Repeat step 8 until all bookings have been defined for the sale.
10. When all bookings and products have been defined for the sale, click the **Next** button to define the method of payment.
11. The End Sale dialog will be displayed on your screen.



12. Choose the payment method by clicking the appropriate payment buttons on the left of your screen.

CASH	EFTPOS	CREDIT CARD
GIFT VOUCHER	CHEQUE	AMEX
INTERNET	MANAGEMENT	PROMO
DIRECT DEBIT	SESSION PASS	JOURNAL

13. Payments may be split across multiple payment types. Simply select the required method of payment and update the amount being paid for each selection.

DEL	CreditCard	2842	\$200.00
DEL	Cash	2842	59.5
DEL			

END

14. To complete the sale, click the **End** button.

15. Complete the sale by clicking the **End** or **Next** button.

Removing an Item from the Sale

An item may be deleted from the sale while it is displayed at the top of the sale item screen. If the item you wish to remove is not displayed at the top of the list, simply click on it to return it to the top. An item cannot be removed from the sale after the sale has been completed.

The screenshot shows the Splash POS interface. On the left is a menu with categories: Common, Bathers, Accessories, Canteen, Misc, Passes, Goggles, and Drinks. The main area displays a list of items for sale, including 'Celia Brown - Turtles - 9:30 AM Tue (Term 1 2014)' and 'Missile Goggles'. A blue arrow points to the 'Del' button next to the first item. On the right, a payment summary shows the total amount of \$259.50. At the bottom, there is a numeric keypad with buttons for 'NEXT', 'END', 'HOLD', and 'DIARY', 'List', 'EoS'.

1. Ensure the item you wish to remove is displayed in the sale item area at the top of the screen.
2. If the items is not displayed at the top of the list, simply click the required item.
3. Click the Del button
4. Complete your sale by clicking the End or Next button.

Applying a Discount to a Sale Item



1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the screen.
3. The POS interface will be displayed on your screen.
4. Select the product you wish to sell.
5. A discount can be applied to an item while it is displayed at the top of the sale item list.
6. Click the Discount box at the right of the sale item screen to display the Staff Discount screen.

1 Missile Goggles \$30
Del

barcode @ \$30.00 ea.
\$30.00

Tuesday, 3 February 2015 3:22pm User

Invoice Number: 147177

STAFF DISCOUNT

STAFF DISCOUNT
VIP
MANAGEMENT
\$1 OFF

POS 1

Item Name
Missile Goggles

Quantity
1

Item Price/Payment Amount
\$30.00

Admend Price
\$25.50

Amount Applied (per item)
\$4.50

Cancel Commit

7. Either click an existing discount button or enter the amended price on the right of the screen.
8. Click Commit to return to your sale screen.
9. A cross will be displayed in the discount box when an item has been discounted.

1 Missile Goggles \$30
Del

barcode @ \$25.50 ea.
\$25.50

10. Complete your sale by clicking the **End** or **Next** button.

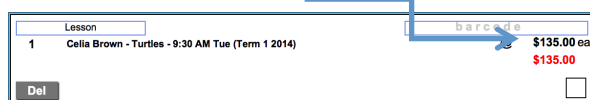
NB: A history of all discounts is recorded in the Discounts area of Splash POS.

Applying a Part Payment to a Booking

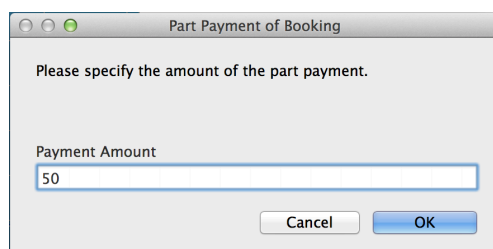
Part payments are only available for bookings. Products must be paid in full at the time of purchase.



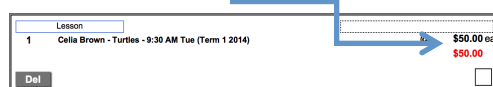
1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the screen.
3. The POS interface will be displayed on your screen.
4. Select the booking you wish to process a payment for.
5. A part payment can only be defined while the booking appears in the sale item area at the top of the list.
6. Click the unit price written in black.



7. The Part Payment of Booking dialog will be displayed on your screen.
8. Enter the amount of the payment you would like to apply and click OK.



9. The booking will be displayed with a revised unit price..



10. Repeat steps 4 through 9 until all relevant bookings have been selected.
11. Complete your sale by clicking the **End** or **Next** button.

NB: The above command does not reduce the price of the initial booking, it simply applies a part payment to the outstanding balance.

Managing the Waiting List

Adding a Student to a Waiting List

1. Select the required Day, Block and Year at the top of the diary screen.
2. Use the list on the left of your screen to select the session you wish to update.
3. Click the **Waiting List** tabcard. All students wait listed for the selected session will be displayed on the lower right corner of your screen.

The screenshot shows the 'Splash Swim School Diary' interface. On the left is a filter panel with 'Weekday' set to 'Wednesday', 'Block' set to '3', and 'Year' set to '2014'. The main area displays a list of sessions on the left and a detailed view of the selected session on the right. The session is 'Turtles @ 9:00 AM on Wednesday with Barbara Smith'. The 'Waiting List' tab is active, showing a list of students waiting for the session. The 'Add Waitlist' button is visible in the bottom right corner of the session details panel.

Time	Class	Instructor	Booked	Spots	Waitlist
9:00AM	TURTLES	BS	1	3	0
9:00AM	DOLPHINS	BS	1	3	0
9:30AM	TURTLES	LW	0	8	0
9:30AM	SEALS	BT	4	0	0
9:30AM	DOLPHINS	BS	1	3	0
9:30AM	DOLPHINS	BT	4	0	0
9:30AM	DOLPHINS	BS	2	2	0
10:00AM	TURTLES	LW	4	4	0
10:30AM	TURTLES	BS	6	2	0
10:30AM	SEALS	BS	1	3	0
11:00AM	SEALS	BS	4	0	0
1:00PM	SEALS	BT	4	0	0
1:00PM	SHARKS	BT	3	3	0
1:30PM	DOLPHINS	DS	2	2	0
1:30PM	WHALES	BS	0	10	0
2:30PM	DOLPHINS	BS	4	0	0

4. Add a new student to the waiting list by clicking the **Add Waitlist** button.

This screenshot shows the same interface as the previous one, but with the 'Add Waitlist' button highlighted by a blue dashed line and an arrow, indicating the next step in the process.

5. The Select a Student dialog will be displayed on your screen. Your cursor will be flashing in the Filter field.
6. Begin typing either the first name or the surname of the swimmer you wish to waitlist. The list will be revised as you type.
7. Click once on the line containing the name of the student you wish to add to the waiting list.

The 'Select a Student' dialog box is displayed. It has a search filter field with the text 'patt' entered. Below the filter is a list of students with their details. The first student, Patterson Ann, is highlighted.

Name	Class	Phone	Address	Class
Patterson Ann	10_1m	027 2222082	76 Kent St, Newlands, Wellington 4008	Turtles
Patterson debra	5_5m	027 2222082	76 Kent St, Newlands, Wellington 4008	Turtles
Patterson Gaylene	14_3m	027 2222082	76 Kent St, Newlands, Wellington 4008	Dolphins
Patterson Sandra	3_7m	027 2222082	76 Kent St, Newlands, Wellington 4008	Sharks

8. The **Enter New Wait List** dialog will be displayed on your screen.

Create New Wait List

Enter New Waitlist

Name

Telephone

Address

Age Gender

Class ID Session ID

Class Name

Instructor

Start Time Block

Weekday Year

Notes

Current Booking

9. Enter any additional comments and click the **Done** button to return to the diary.

Transferring a Student from the Waiting List to the Session

1. Select the required Day, Block and Year at the top of the diary screen.
2. Select the session containing the waitlist by clicking on the waiting list icon in the left panel on your screen.

Filter By:

Weekday Block Year

Class

Time	Class	Instructor	Booked	Spaces	Catchups
9:00AM	TURTLES	BS	1	5	0
9:00AM	DOLPHINS	BS	1	3	0
9:30AM	TURTLES	LW	0	8	0
9:30AM	SEALS	BT	4	0	0
9:30AM	DOLPHINS	BS	1	3	0
9:30AM	DOLPHINS	BT	4	0	0
9:30AM	DOLPHINS	BS	2	2	0
10:00AM	TURTLES	LW	4	4	0
10:30AM	TURTLES	BS	6	2	0
10:30AM	SEALS	BS	1	3	0
11:00AM	SEALS	BS	4	0	0
1:00PM	SEALS	BT	4	0	0
1:00PM	SHARKS	BT	3	3	0
1:30PM	DOLPHINS	DS	2	2	0
1:30PM	WHALES	BS	0	10	0
2:30PM	DOLPHINS	BS	4	0	0

3. You will be taken to the waitlist screen. All students wait listed for the selected session will be displayed on the lower right corner of your screen.
4. Click the four directional arrow to the right of the student name in the wait list.

Splash Swim School Diary 29 January 2015

Filter By: Weekday Wednesday Block 3 Year 2014 Class All

Time	Class	Instructor	Booked	Spots	Calculus
9:00AM	TURTLES	BS	1	3	0
9:30AM	DOLPHINS	BS	1	3	0
9:30AM	TURTLES	LW	0	8	0
9:30AM	SEALS	BT	4	0	0
9:30AM	DOLPHINS	BS	1	3	0
9:30AM	DOLPHINS	BT	2	0	0
10:00AM	TURTLES	LW	4	4	0
10:30AM	TURTLES	BS	6	2	0
10:30AM	SEALS	BS	1	3	0
11:00AM	SEALS	BS	4	0	0
1:00PM	SEALS	BT	4	0	0
1:00PM	SHARKS	BT	3	3	0
1:30PM	DOLPHINS	DS	2	2	0
1:30PM	WHALES	BS	0	10	0
2:30PM	DOLPHINS	BS	4	0	0

Turtles @ 9:00 AM on Wednesday with Barbara Smith

Bookings Waiting List Achievements Session Details

Session ID 7512 Class ID tur

Class Name Turtles Class Level 1 Programme Preschool

Sessions Details Start Date 9/7/2014 End Date 28/9/2014 Start Time 9:00 AM Weekday Wednesday Block 3 Year 2014 No. of Sessions 12 Frequency Weekly Location Learners Pool

Cost of Session Cost Method Cost Per Session Default Cost \$15.00 DD Cost \$15.00 Default Total \$180.00 DD Total \$180.00

Instructor Details Instructor BS Barbara Smith Telephone: Barbara Smith

Comments

Print Add Waitlist

28/04/14 Sam Smith 9/06/14 Jonathan Fairbrother 9/06/14 Jack McArthur 29/01/15 Gaylene Patterson

Click to transfer the student

- A message will be displayed asking if you wish to transfer the student from the waiting list into the selected session.

Transfer Student to Session

Are you sure you want to transfer Jonathan Fairbrother into the Turtles class at 9:00AM?

Cancel OK

- Click **OK** to continue.
- The **Enter New Booking** dialog box will be displayed on your screen.

Create New Booking

Enter New Booking Details

Name Jonathan Fairbrother Telephone 04 789 4568 Address 56 Watt St, Tatahi Bay, Wellington 4012 Age 9_5m Gender Male # Bookings This Block 1

Session Details Session ID 7512 Class ID tur Block 3 Class Name Turtles Year 2014 Instructor Barbara Smith Location Learners Pool Payment Required By 9/7/2014 Start Time 09:00:00 No. of Sessions 12 Start Date 9/7/2014 End Date 28/9/2014 Weekday Wednesday

Cost of Lessons Direct Debit Comments

Cost Method Cost Per Session @ \$15.00 Initial Cost \$180.00 Discount Rate 10% Discount Type Percent Discount Applied \$18.00 Credit Due Credit Taken Credit Applied Value of Free Lessons \$0.00 Payment by Direct Debit Yes Balance Due \$162.00

Cancel Done

8. Update the booking details to include the correct start date, number of sessions and cost.
9. Click **Done** to continue and return to the diary.

Removing a Student from the Waiting List

1. Ensure the Swim School Diary is displayed on your screen.
2. Select the required Day, Block and Year at the top of the diary screen.
3. Use the list on the left of your screen to select the session you wish to update.

Filter By: Weekday: Wednesday, Block: 3, Year: 2014, Class: All

Time	Class	Instructor	Booked	Spaces	Catchups
9:00AM	TURTLES	BS	2	4	0
9:00AM	DOLPHINS	BS	1	3	0
9:30AM	TURTLES	LW	0	8	0
9:30AM	SEALS	BT	4	0	0
9:30AM	DOLPHINS	BS	1	3	0
9:30AM	DOLPHINS	BT	4	0	0
9:30AM	DOLPHINS	BS	2	2	0
10:00AM	TURTLES	LW	4	4	0
10:30AM	TURTLES	BS	6	2	0
10:30AM	SEALS	BS	1	3	0
11:00AM	SEALS	BS	4	0	0
1:00PM	SEALS	BT	4	0	0
1:00PM	SHARKS	BT	3	3	0
1:30PM	DOLPHINS	DS	2	2	0
1:30PM	WHALES	BS	0	10	0
2:30PM	DOLPHINS	BS	4	0	0

4. Click the **Waiting List** tabcard or the red flag in the left panel for the required session. All students wait listed for the selected session will be displayed on the lower right corner of your screen.
5. Click the **Delete** button to the right of the student name in the waiting list.

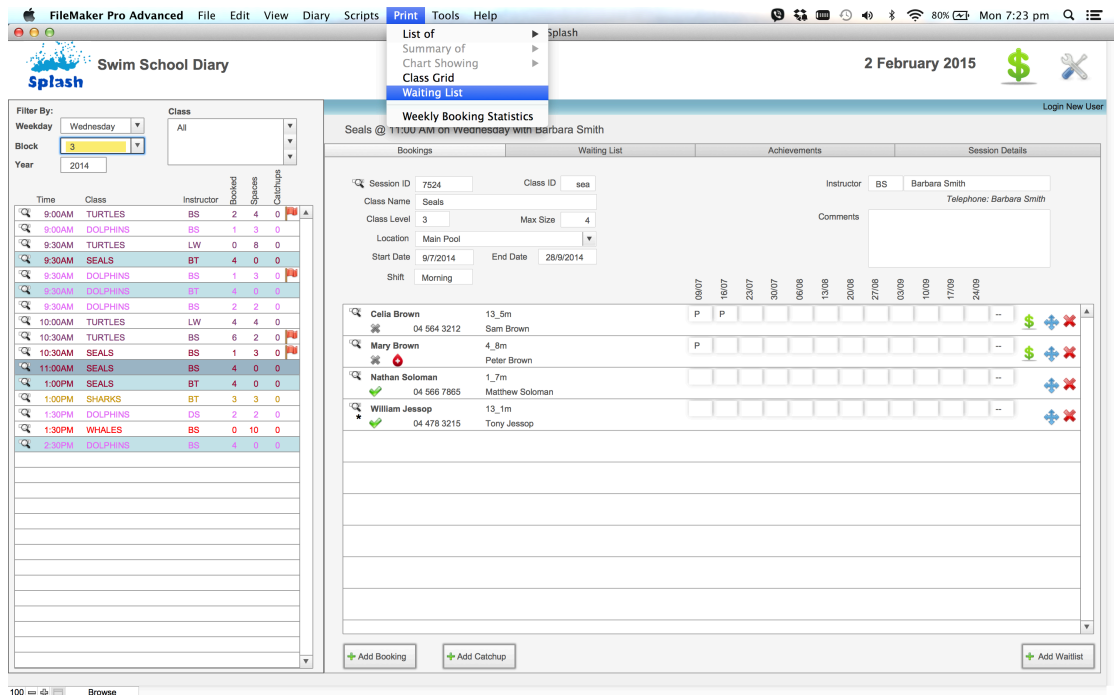
28/04/14	Sam Smith	✕
9/06/14	Jack McArthur	✕
29/01/15	Gaylene Patterson	✕

6. A message will be displayed asking if you wish to remove the student from the waiting list. Click OK to delete the waitlist entry or Cancel to close the dialog without making a change.



Printing the Waiting List

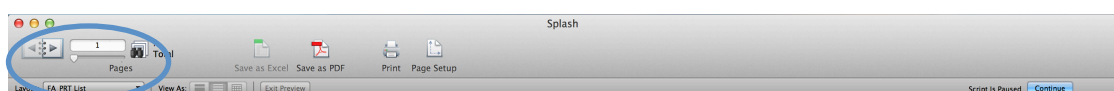
1. Ensure the Swim School Diary is displayed on your screen.
2. Select **Waiting List** from the Print menu.



3. The Locate Waiting List Records dialog will be displayed on your screen. Enter the Block and Year for the waitlist records you wish to display and click OK.

4. The second Locate Waiting List Records dialog will be displayed on your screen. Enter the Classname and/or student name if you wish to print a specific list, otherwise **leave blank for all waitlist records** in the selected Block and Year and click OK.

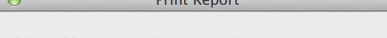
5. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



List of Waitlisted Students				
Student ID / Name	Class Name	Block / Year		
Dolphins	Sunday	9:30 AM	Barbara Smith	
Nicholas Smith	0272222082	10/6/14		
Dolphins	Sunday	9:00 AM	Barbara Smith	
Nicholas Larsen	04 479 5648	28/1/14	Currently booked in Monday at 9am	
Dolphins	Sunday	1:30 PM	Brian Thomson	
Jonathan Fairbrother	04 789 4568	11/1/14	notes re waitlist here	
Seals	Saturday	10:30 AM	Barbara Smith	
john mcdougal	04 478 3156	4/1/14	jji i jlk i jji lkj i j i j i jlk i j	
john mcdougal	04 478 3156	11/1/14		
Nicholas Smith	0272222082	15/7/14		
Sharks	Friday	1:00 PM	Brian Thomson	
Nicholas Larsen	04 479 5648	17/3/14		
Dolphins	Tuesday	9:30 AM	Barbara Smith	
Sam Williams	04 477 8952	12/1/14		
Harry Williams	04 477 8952	12/1/14		
James Jones		12/1/14		

2/2/2015 : 07:24:25 PM

Page 1



Print Report

Would you like to print the waiting list report?

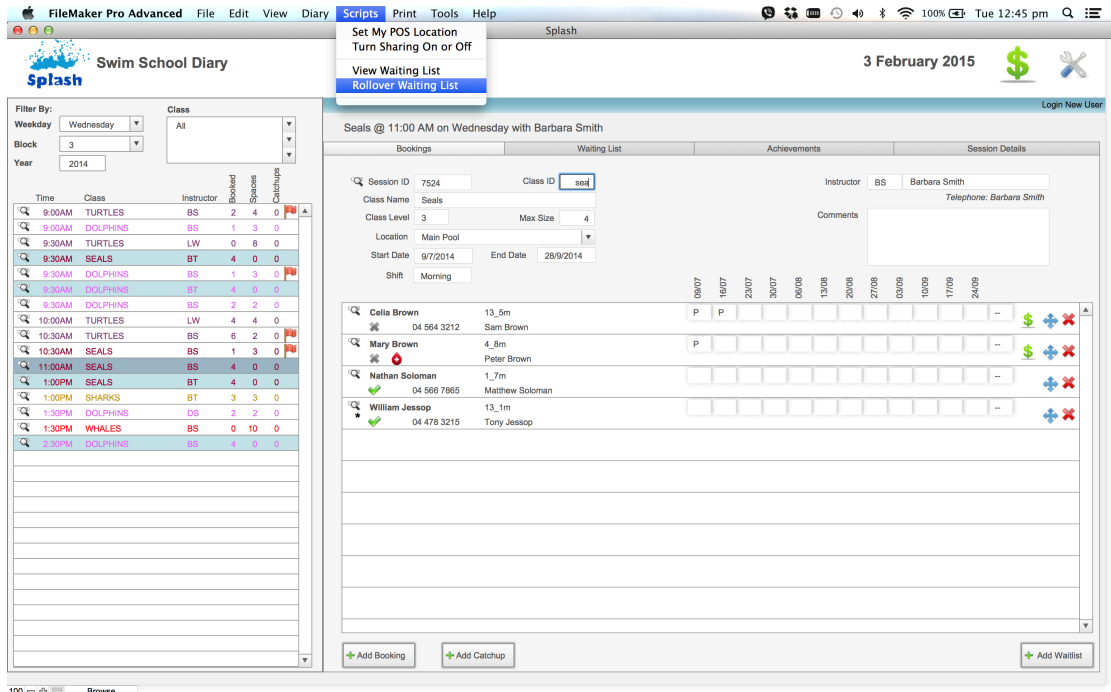
Cancel OK

Page 306

Transferring the Waiting List to the Next Block

At the end of each term you will create your schedule for the coming block. Splash provides the ability to automatically rollover both the sessions and the bookings to assist you with recreating the bookings. In addition to the rollover of bookings and you can also transfer your waiting list entries from one block to the next. This command is only successful after you have rolled over the session details.

1. Ensure the diary is displayed on your screen.



2. Select **Rollover Waiting List** from the Scripts menu.
3. The Locate Waiting List Records dialog will be displayed on your screen. Enter the name of the Block and Year for the records you wish to rollover.

Please specify the term and year to be rolled over.

Block

Year

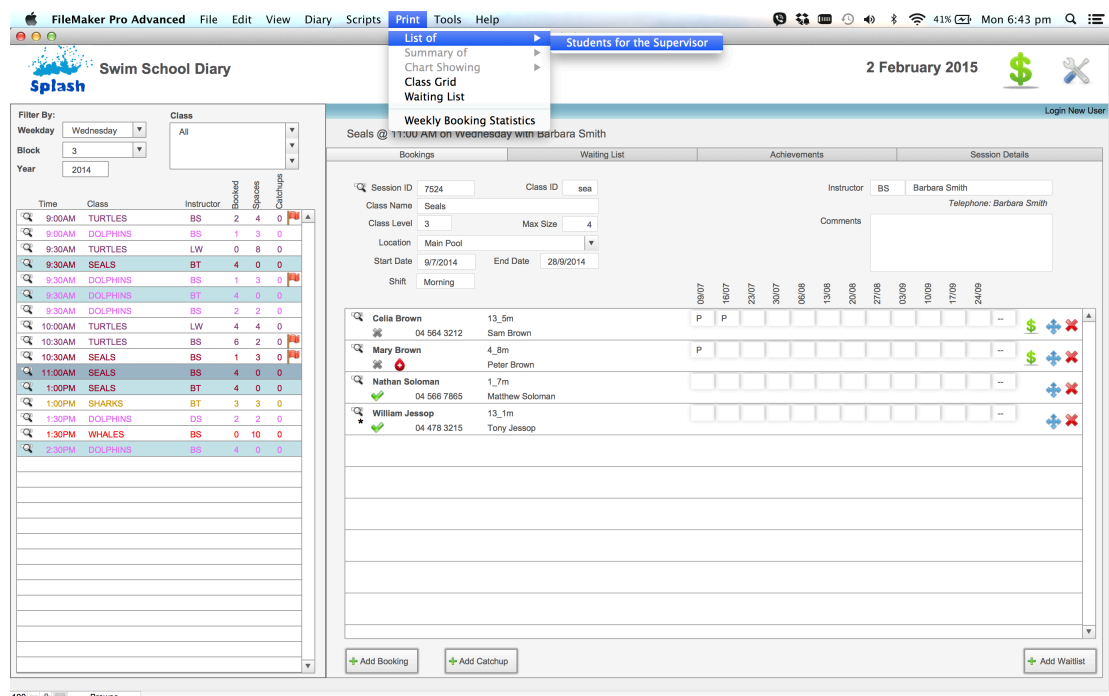
Cancel OK

4. The rollover will be performed, any flags displayed in the original block will now be displayed on the next block.

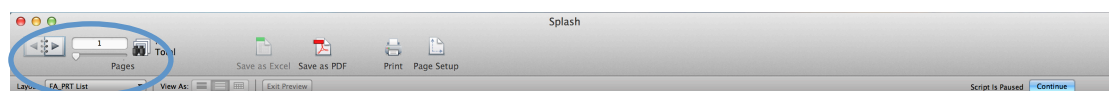
Printing Reports

Printing a List of Students for the Supervisor

1. Ensure the Swim School Diary is displayed on your screen.
2. Select the required Day, Block and Year at the top of the diary screen.
3. Select **List of ... Students for the Supervisor** from the Print menu.

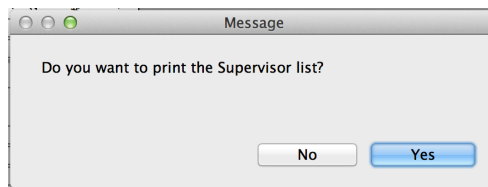


4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



Attendance List														
Supervisor Listing for Wednesday														
9:00 AM - Turtles (Learners Pool) Barbara Smith (2 Students)														
Barbara Smith				9/7	16/7	23/7	30/7	6/8	13/8	20/8	27/8	3/9	10/9	# Attempts
\$	Jonathan	9_5m	Mark Fairbroth											2
\$	William Jessop	13_1m	Tony Jessop											1
9:30 AM - Dolphins (Main Pool) Brian Thomson (4 Students)														
Brian Thomson				9/7	16/7	23/7	30/7	6/8	13/8	20/8	27/8	3/9	10/9	# Attempts
\$	Jack McArthur	11_11m	Andrew McArthur	A	A									5
\$	Katrina O'Donnell	13_11m	Patricia O'Don	A	A									1
\$	Sam Smith	7_10m	Barbara Smith	A	A									2
\$	Tracey O'Donnell	11_8m	Patricia O'Don	C	A									1
9:30 AM - Seals (Main Pool) Brian Thomson (4 Students)														
Brian Thomson				9/7	16/7	23/7	30/7	6/8	13/8	20/8	27/8	3/9	10/9	# Attempts
\$	Billy Jones	2_4m	David Jones	P	P									1
\$	John Thomson	8_9m	Anthony Thomso	A										1

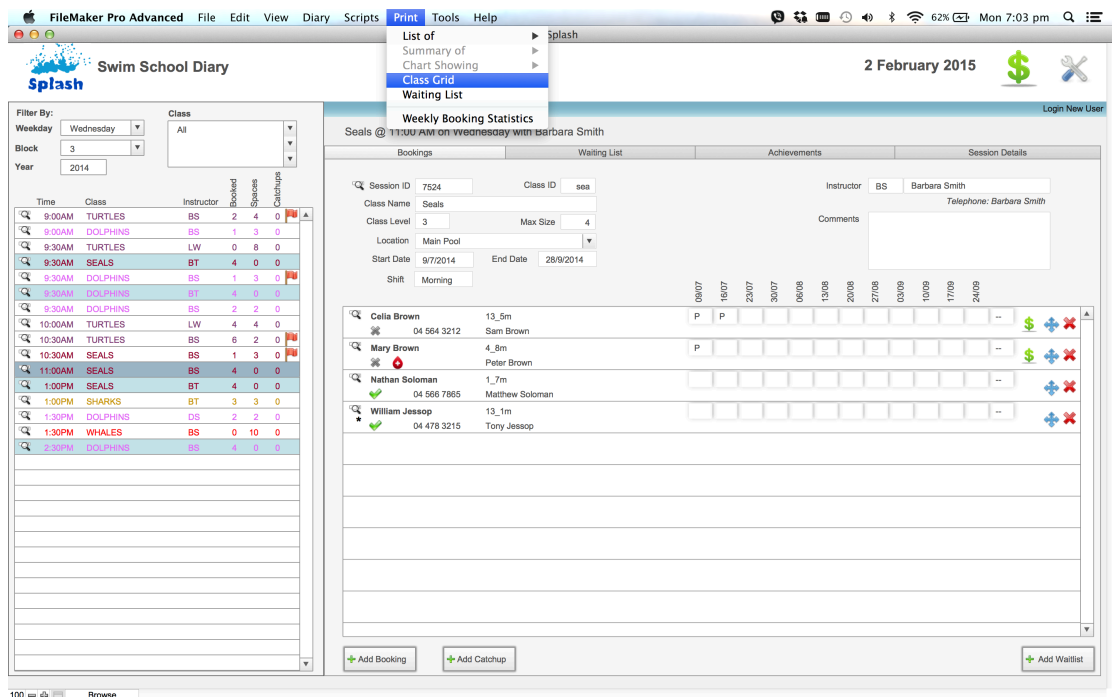
5. The **Message** dialog will be displayed on your screen.



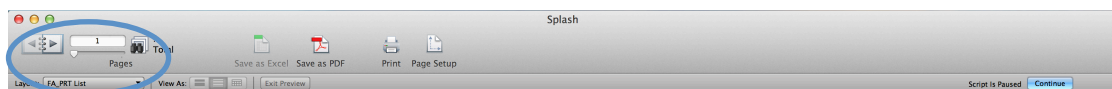
6. Click **Yes** to print the report or **No** to return to your original screen without printing or emailing.

Printing the Class Grid

1. Ensure the Swim School Diary is displayed on your screen.
2. Select the required Day, Block and Year at the top of the diary screen.
3. Select **Class Grid** from the Print menu.



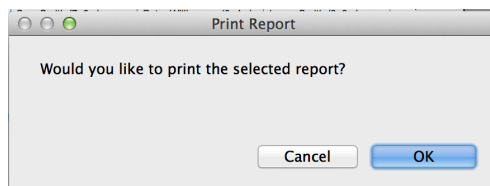
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



Wednesday Morning - Block 3 - 2014							
9:00am 2 4 Turtles William Jessop (12_9m) Jonathan Fairbrother (9_5m)	9:00am 1 3 Dolphins Lucas Smith (2_3m)	9:30am 0 8 Turtles No Bookings	9:30am 1 3 Dolphins Joanne Jones (4_1m)	9:30am 4 0 Dolphins Sam Smith (7_6m) Katrina O'Donnell (13_7m) Jack McArthur (11_8m) Tracey O'Donnell (11_4m)	9:30am 4 0 Seals Peter Williamson (0_4m) Billy Jones (2_0m) John Thomson (8_6m) William Smith (4_3m)	9:30am 2 2 Dolphins Lucas Smith (2_3m) Sarah Nightingale (12_0m)	
BS Learners Pool	BS Main Pool	LW Learners Pool	BS Main Pool	BT Main Pool	BT Main Pool	BS Main Pool	
10:00am 4 4 Turtles Tony Zelish (8_7m) Robert Thomson (9_8m) Stuart Sinclair (7_3m) John Smith (7_3m)	10:30am 6 2 Turtles Jamie Watkins (6_1m) Jack McArthur (11_8m) Janet Kimble (3_8m) Sam Williams (3_11m) Susan Aplin (2_11m) Bridgette Robinson (13_8m)	10:30am 1 3 Seals Georgia Taylor (8_10m)	11:00am 4 0 Seals Celia Brown (13_1m) Mary Brown (4_4m) Nathan Solomon (1_3m) William Jessop (12_9m)	1:00pm 4 0 Seals Corey Morrison (12_2m) Nicholas Smith (7_7m) Paula Schwass (8_2m) Sam Smith (7_6m)	1:00pm 3 3 Sharks William Smith (4_3m) Gareth Buchanan (10_2m) Jack McArthur (11_8m)	1:30pm 0 10 Whales No Bookings	
LW Learners Pool	BS Learners Pool	BS Main Pool	BS Main Pool	BT Main Pool	BT Main Pool	BS Main Pool	
1:30pm 2 2 Dolphins Jack McArthur (11_8m) Anthony Apollo (6_3m)							
DS Main Pool							

Printed 2/2/15 at 7:03 PM

- The **Print Report** dialog will be displayed on your screen.

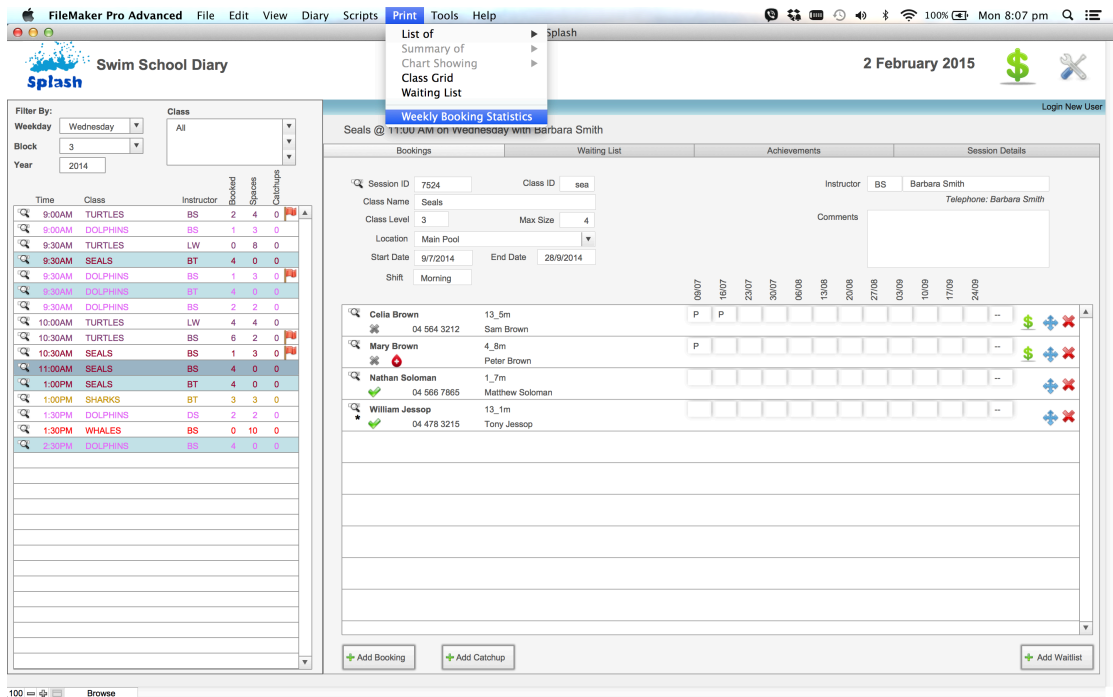


- Click **OK** to print the report or **Cancel** to return to your original screen without printing.

Printing Weekly Booking Statistics

Weekly booking statistics are a series of six pre written reports. Simply enter a start and an end date and Splash will locate the relevant records and produce the following six reports.

1. Ensure the Swim School Diary is displayed on your screen.
2. Select **Weekly Booking Statistics** from the Print menu.



3. The Specify Start and End Dates for Reporting dialog will be displayed on your screen.
4. Enter the date range for reporting. Dates should be entered as dd/mm/yy. Splash will use this date range (including the two specified) to locate data for each report. Click OK.

Specify Start and End Dates for Reporting

Please enter the start date and the end date for the week you wish to report.

Week Start
1/5/2014

Week End
7/5/2014

OK

5. The Specify Term and Year dialog will be displayed on your screen.
6. Enter the Term/Block and Year to be included in your reporting and click OK.

Specify Term and Year

Please enter the Term and Year for reporting

Term
2

Year
2014

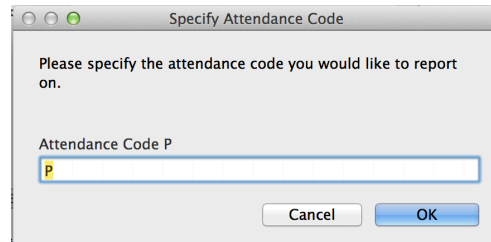
OK

- Splash will now locate the relevant records for reporting. The following six reports will be displayed on your screen.

Report 1 – Summary of Attendance

This report displays the total number of swimmers with a specified attendance code who were active at the time specified for your report.

- The Specify Attendance Code dialog will be displayed on your screen.
- Enter the attendance code you wish to have counted.



Specify Attendance Code

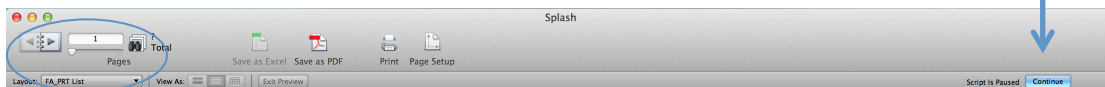
Please specify the attendance code you would like to report on.

Attendance Code P

P

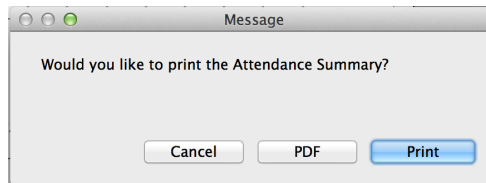
Cancel OK

- In the example below P has been used to define a student as present for a lesson. The summary report shows a count of how many P's were entered for each date.
- The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



Summary of Attendance														
Attendance Code : P														
Block 2 - 2014														
Tuesday		8	6/05	13/05	20/05	27/05	3/06	10/06	17/06	24/06	1/07			
Dolphins			3	2	3	3	1	0	0	0	0	0	0	0
Seals			1	0	1	1	0	0	0	0	0	0	0	0
Sharks			1	1	1	1	0	0	0	0	0	0	0	0
Turtles			0	0	0	0	0	0	0	0	0	0	0	0
Wednesday		3	7/05	14/05	21/05	28/05	4/06	11/06	18/06	25/06	2/07			
Dolphins			2	1	2	2	2	0	0	0	0	0	0	0
Seals			1	1	1	1	1	0	0	0	0	0	0	0
Friday		9	9/05	16/05	23/05	30/05	6/06	13/06	20/06	27/06	4/07			
Dolphins			1	1	1	1	1	0	0	0	0	0	0	0
Seals			2	2	2	2	1	0	0	0	0	0	0	0
Saturday		4	10/05	17/05	24/05	31/05	7/06	14/06	21/06	28/06	5/07			
Dolphins			2	0	2	2	0	0	0	0	0	0	0	0
Seals			0	0	0	0	0	0	0	0	0	0	0	0
Sunday		23	4/05	11/05	18/05	25/05	1/06	8/06	15/06	22/06	29/06			
Dolphins			20	14	20	20	16	0	0	0	0	0	0	0
Seals			9	8	9	9	7	0	0	0	0	0	0	0
			6	1	6	6	5	0	0	0	0	0	0	0

- The **Print Report** dialog will be displayed on your screen.

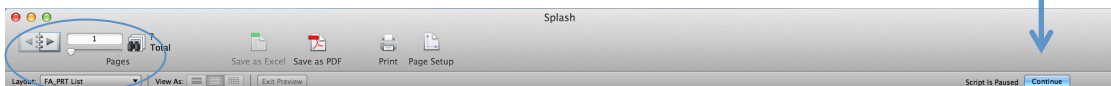


13. Click **Print** to print the report, **PDF** to save the report as a PDF or **Cancel** to return to your original screen without printing or saving.

Report 2 – Summary of Bookings

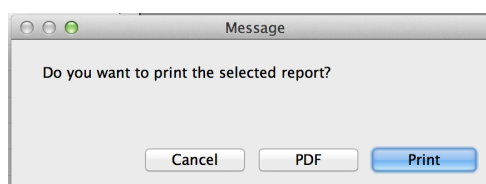
This report displays a count of the number of bookings, exits and catchups which

14. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



Summary of Bookings			
Summary by Weekday			
	Number of Bookings	Number of Exits	Number of Catchups
Term: 2 2014	48	1	0
Friday	9	0	0
<i>Dolphins</i>	5	0	0
<i>Seals</i>	4	0	0
Saturday	4	0	0
<i>Dolphins</i>	3	0	0
<i>Seals</i>	1	0	0
Sunday	23	0	0
<i>Dolphins</i>	11	0	0
<i>Seals</i>	6	0	0
<i>Sharks</i>	1	0	0
<i>Turtles</i>	5	0	0
Tuesday	8	0	0
<i>Dolphins</i>	5	0	0
<i>Seals</i>	1	0	0
<i>Sharks</i>	1	0	0
<i>Turtles</i>	1	0	0
Wednesday	4	1	0
<i>Dolphins</i>	2	0	0
<i>Seals</i>	2	1	0

15. The **Message** dialog will be displayed on your screen.

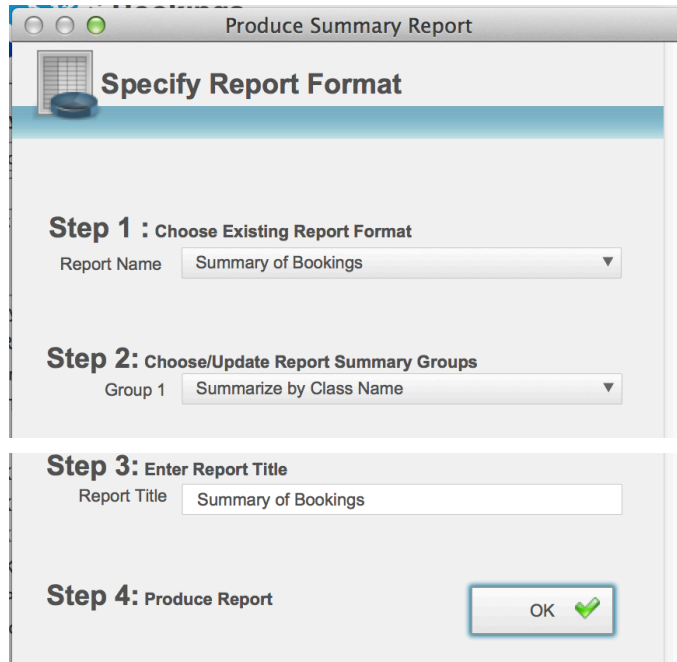


16. Click **Print** to print the report, **PDF** to save the report as a PDF or **Cancel** to return to your original screen without printing or saving.

Report 3 – Chart Showing Summary of Bookings

This report shows the same information as displayed in report 2, however it is represented as a chart.

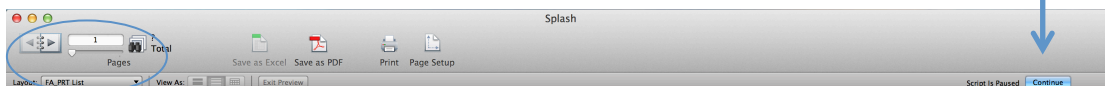
16. The Produce Summary Report dialog will be displayed on your screen.
17. You may elect to leave this dialog exactly as displayed and simply click the OK button. OR you may change the format of the report by amending the selections at Step 1 and Step 2.

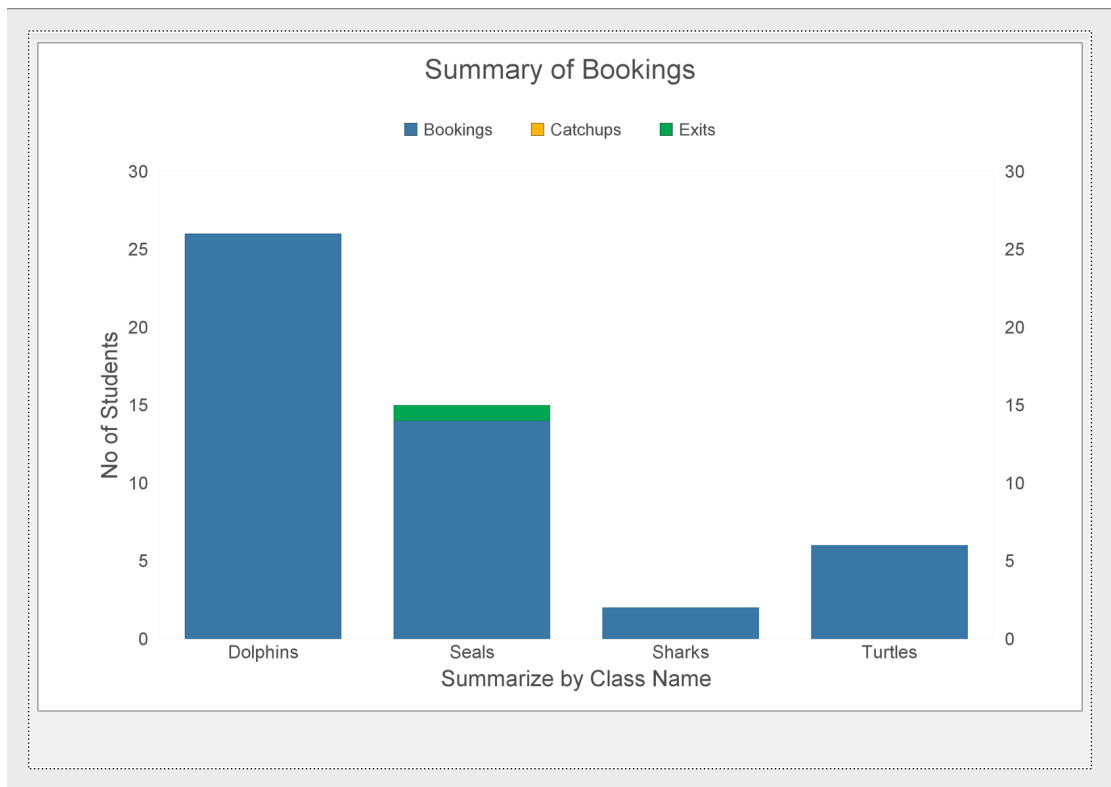


The image shows a dialog box titled "Produce Summary Report". Inside, there is a section titled "Specify Report Format" with a small icon of a document and a blue bar. Below this, there are four steps:

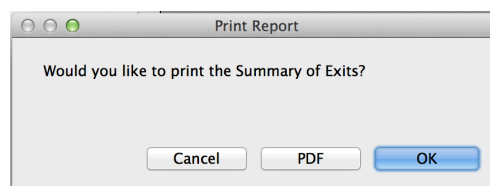
- Step 1 : Choose Existing Report Format**
Report Name: Summary of Bookings (dropdown menu)
- Step 2: Choose/Update Report Summary Groups**
Group 1: Summarize by Class Name (dropdown menu)
- Step 3: Enter Report Title**
Report Title: Summary of Bookings (text field)
- Step 4: Produce Report**
OK button with a green checkmark icon

18. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).





19. The **Print Report** dialog will be displayed on your screen.

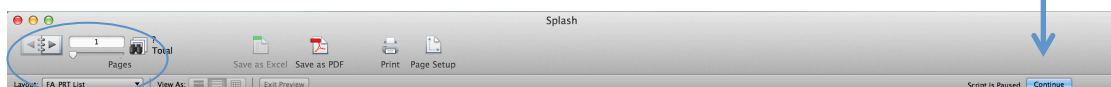


20. Click **Print** to print the report, **PDF** to save the report as a PDF or **Cancel** to return to your original screen without printing or saving.

Report 4 – List of Outstanding Balances

This report displays a list of all outstanding accounts for the selected block and year.

21. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).

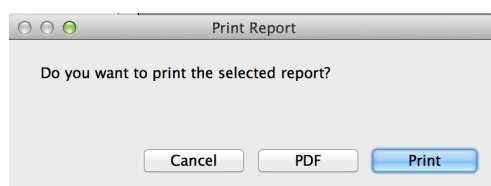


Bookings - Current Balance of Booking

Balance as at 2/2/2015

						Balance
Anderson (David Anderson)					09 897 9845	\$94.50
Sally Anderson	Turtles	Sun	BS	Block: 2	2014	\$94.50
Apollo (Martha Apollo)					756 7898	\$63.00
Anthony Apollo	Dolphins	Sun	BT	Block: 2	2014	\$63.00
Brown (Sam Brown)					04 564 3212	\$94.50
Celia Brown	Turtles	Sun	BS	Block: 2	2014	\$94.50
Buchanan (Debbie Buchanan)					0272222082	\$53.00
Frederick Buchanan	Dolphins	Sun	BS	Block: 2	2014	\$53.00
Jessop (Tony Jessop)					04 478 3215	\$54.00
William Jessop	Seals	Sun	BS	Block: 2	2014	\$54.00
Jones (David Jones)					1234 567	\$127.50
Billy Jones	Seals	Sun	BS	Block: 2	2014	\$63.00
william Smith	Dolphins	Sun	BT	Block: 2	2014	\$64.50
King (Nathan King)					05 678 4564	\$157.50
Craig King	Turtles	Sun	BS	Block: 2	2014	\$94.50
David King	Dolphins	Fri	BT	Block: 2	2014	\$63.00
Morrison (Celia Morrison)					04 237 8536	\$63.00
Corey Morrison	Seals	Sun	BT	Block: 2	2014	\$63.00
Patterson (Mary Patterson)					027 2222082	\$63.00
Sandra Patterson	Sharks	Tue	BT	Block: 2	2014	\$63.00
Schwass (Robyn Schwass)					478 4616	\$63.00
Paula Schwass	Dolphins	Tue	BT	Block: 2	2014	\$63.00
Sinclair (Linley Sinclair)					04 236 4679	\$81.00
Jessica Sinclair	Dolphins	Sat	BT	Block: 2	2014	\$81.00

22. The **Print Report** dialog will be displayed on your screen.

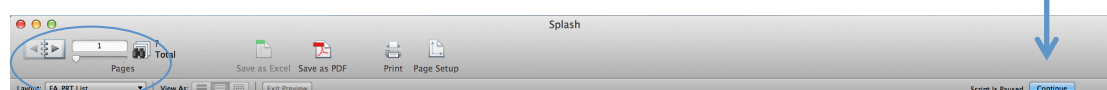


23. Click **Print** to print the report, **PDF** to save the report as a PDF or **Cancel** to return to your original screen without printing or saving..

Report 5 – Summary of New Bookings

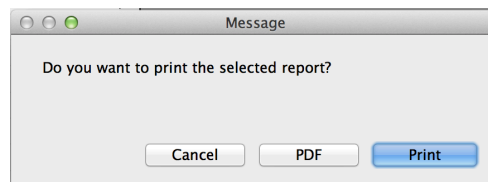
This report shows a summary of new bookings that have been received in the date range specified.

24. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



Summary of Bookings			
Summary of New Bookings	Number of Bookings	Number of Exits	Number of Catchups
Term: 1A 2014	1	0	0
Monday	1	0	0
<i>Seals</i>	1	0	0
Term: 2 2014	8	0	0
Friday	4	0	0
<i>Dolphins</i>	3	0	0
<i>Seals</i>	1	0	0
Sunday	1	0	0
<i>Turtles</i>	1	0	0
Tuesday	1	0	0
<i>Dolphins</i>	1	0	0
Wednesday	2	0	0
<i>Dolphins</i>	1	0	0
<i>Seals</i>	1	0	0
Term: 3 2014	12	0	0
Saturday	1	0	0
<i>Turtles</i>	1	0	0
Sunday	4	0	0

25. The **Print Report** dialog will be displayed on your screen.

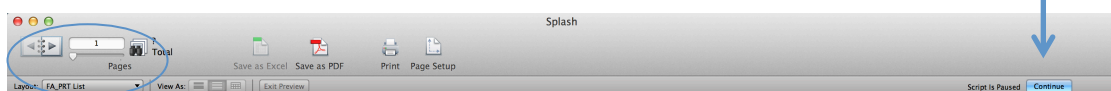


26. Click **Print** to print the report, **PDF** to save the report as a PDF or **Cancel** to return to your original screen without printing or saving.

Report 6– Summary of Exits

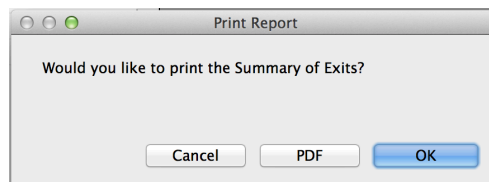
This report shows a summary of any bookings that have been terminated within the specified timeframe.

27. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



Summary of Bookings			
Summary of Exits	Number of Bookings	Number of Exits	Number of Catchups
Financial	1	1	0
Loss of Interest	1	1	0
Other	1	1	0
Other Commitments	1	1	0

28. The **Print Report** dialog will be displayed on your screen.

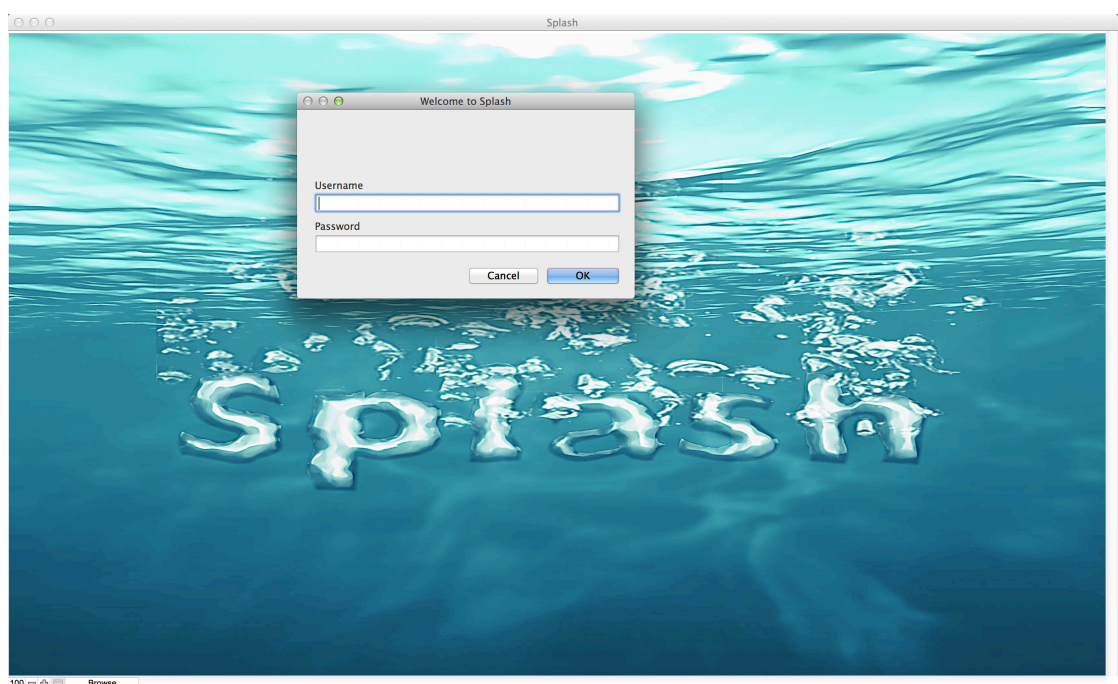
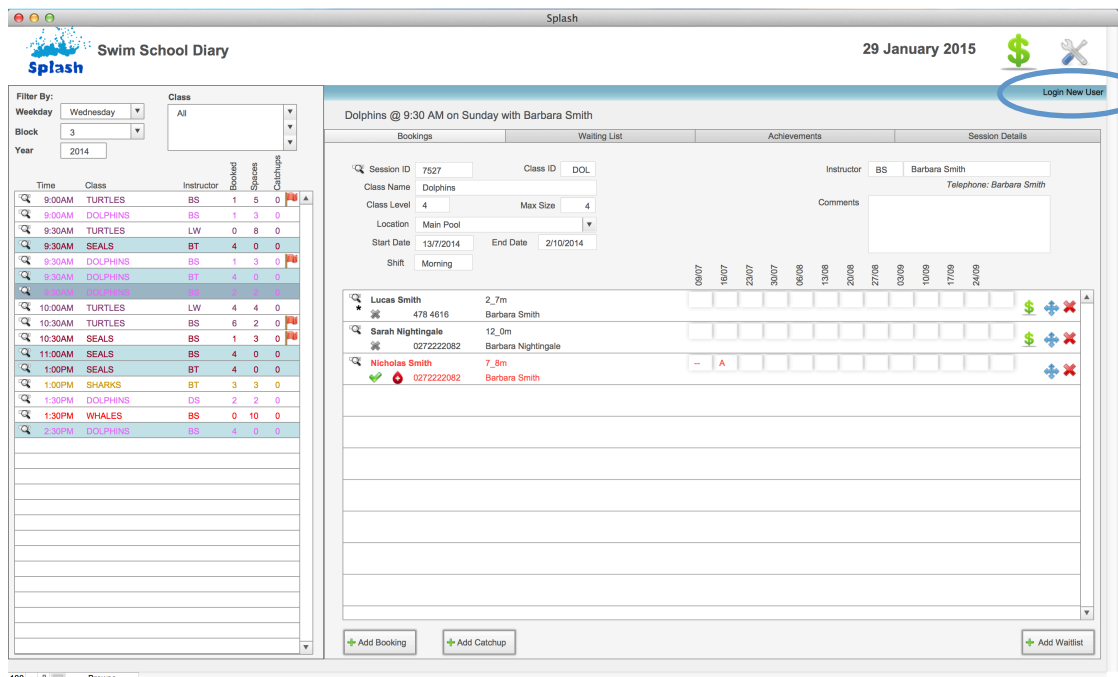


29. Click **Print** to print the report, **PDF** to save the report as a PDF or **Cancel** to return to your original screen without printing or saving.

Logging in as a New User

Each user account contains a personalised set of access privileges. At times you may not have the level of access needed to perform a selected function. If this occurs you can get another user to login using an alternative account. You do NOT need to exit the Splash program in order to switch user accounts.

1. Ensure the Swim School Diary is displayed on your screen.
2. Click once on the **Login New User** button displayed on the right of the blue stripe.
3. You will be asked to enter your username and password.
4. Enter the required details and click OK



Using Splash Point of Sale

The first section of this guide addresses setting up each area of POS so it is ready for use.

Payment processing is accessed using the green dollar symbol on the top right corner of your screen. The full point of sale system, however is accessed via the Splash menu on the top left of your screen. Your user access privileges will define whether you can process a payment, run reports, enter new products, or order stock. If you have insufficient access to complete any task, please refer to your system administrator.

Defining Your Point of Sale Location

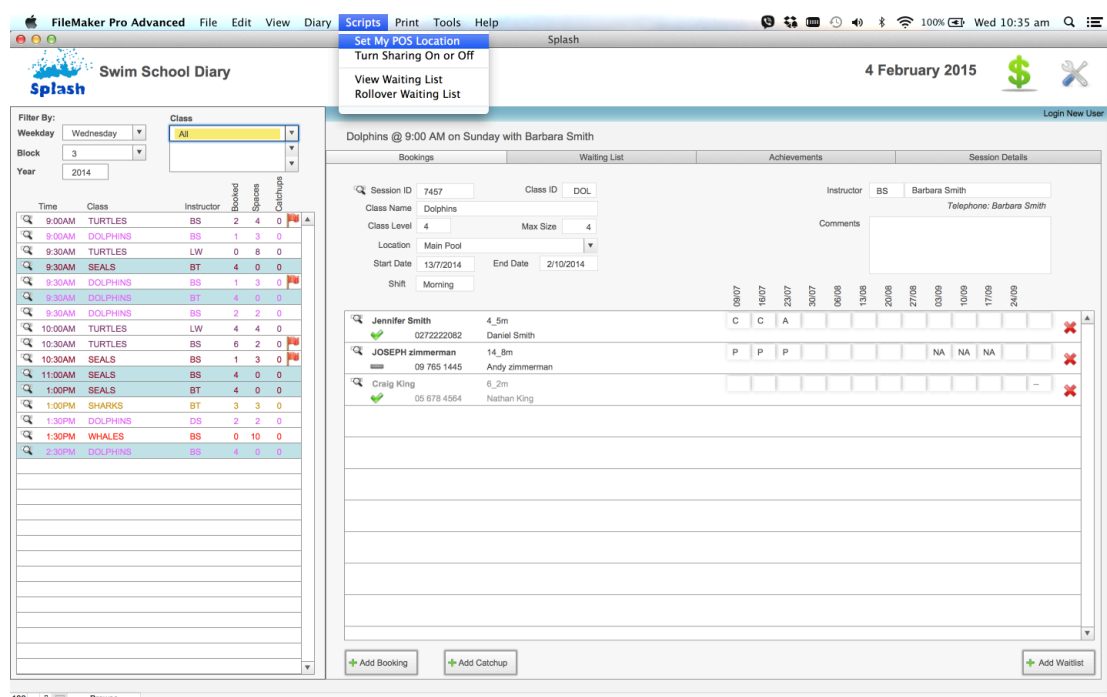
Your point of sale location determines the interface that will be displayed when you access the sale entry screen. Splash provides the flexibility to customise the user interface for multiple locations. The default location when you first begin using Splash is "POS 1".

Before you can begin using Splash Point of Sale (POS) system you must define your POS Location.

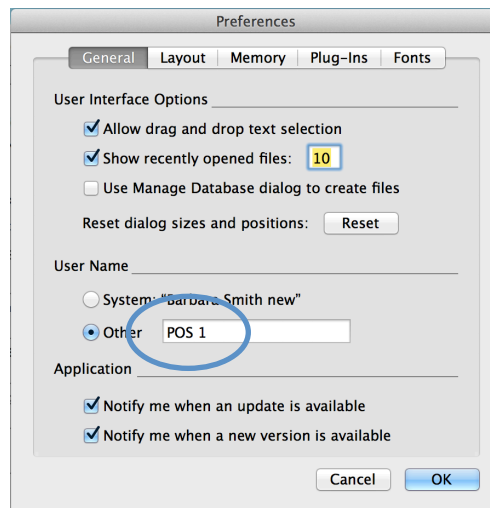
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Daily Diary** icon



3. Select **Set My POS Location** from the Scripts menu.



4. The Preferences dialog will be displayed on your screen.



5. If this is your first time accessing POS enter the default POS location of **“POS 1”** in the Other box.

6. Click OK to save the changes you have made.

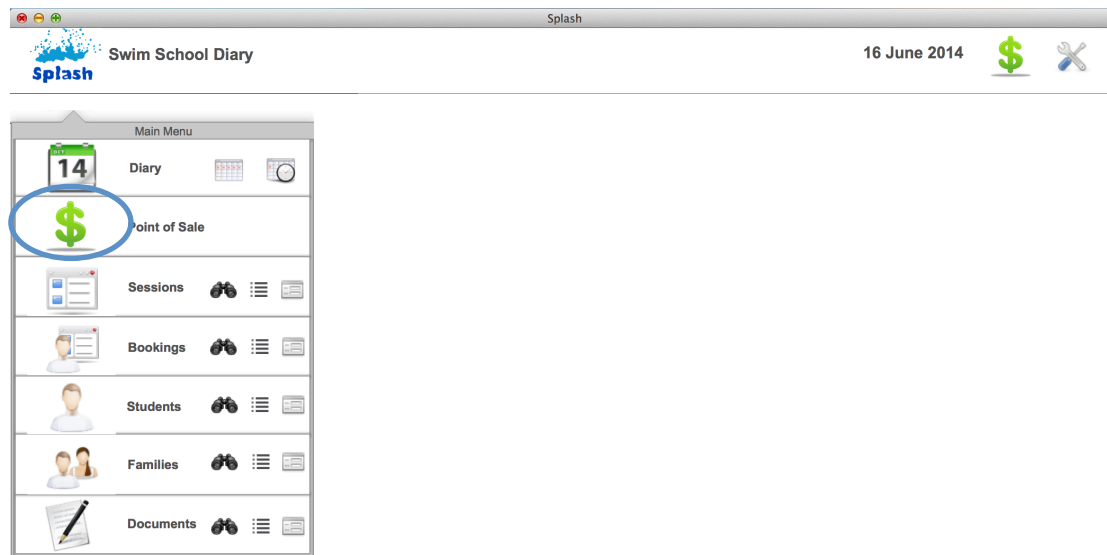
NB: If you have created multiple display options in the POS system, the above name should match the name of the interface you have defined. To define additional interface screens see “Defining Your Point of Sale Location” in this guide.

Administering Point of Sale (POS)

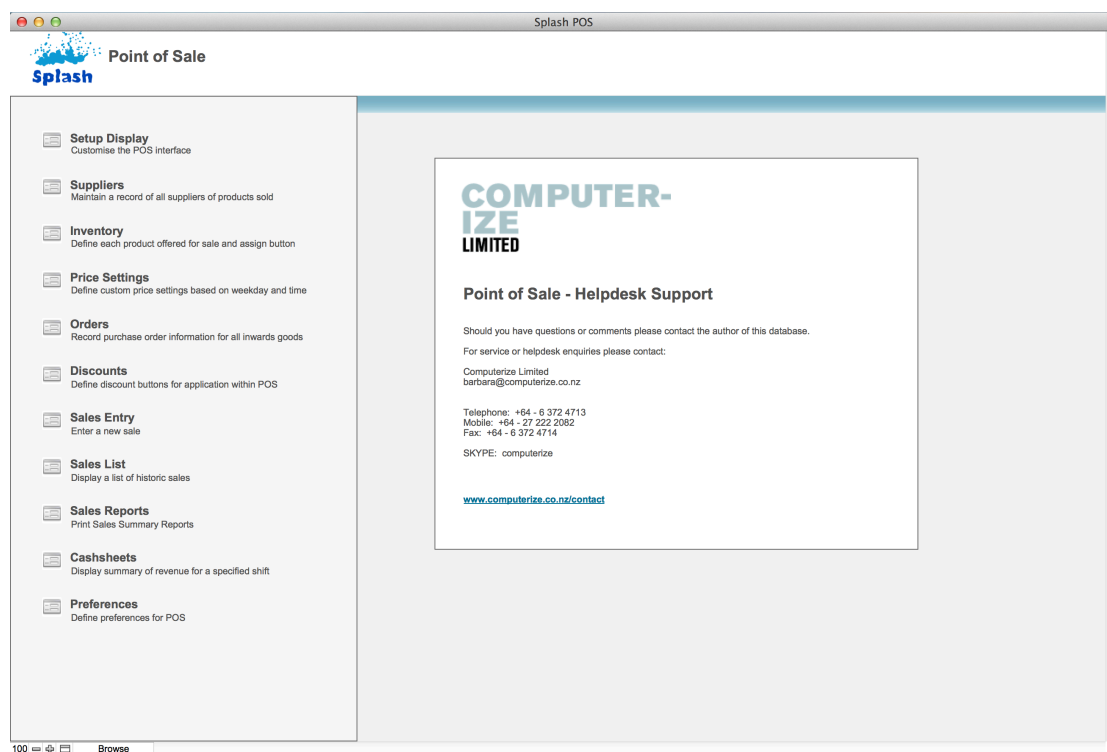
In order to use the Point of Sale system you will need to define the interface you wish to display and the products you wish to sell.

This section of the manual guides you through configuring POS to meet your needs.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Point of Sale** icon



3. The POS administration screen will be displayed.

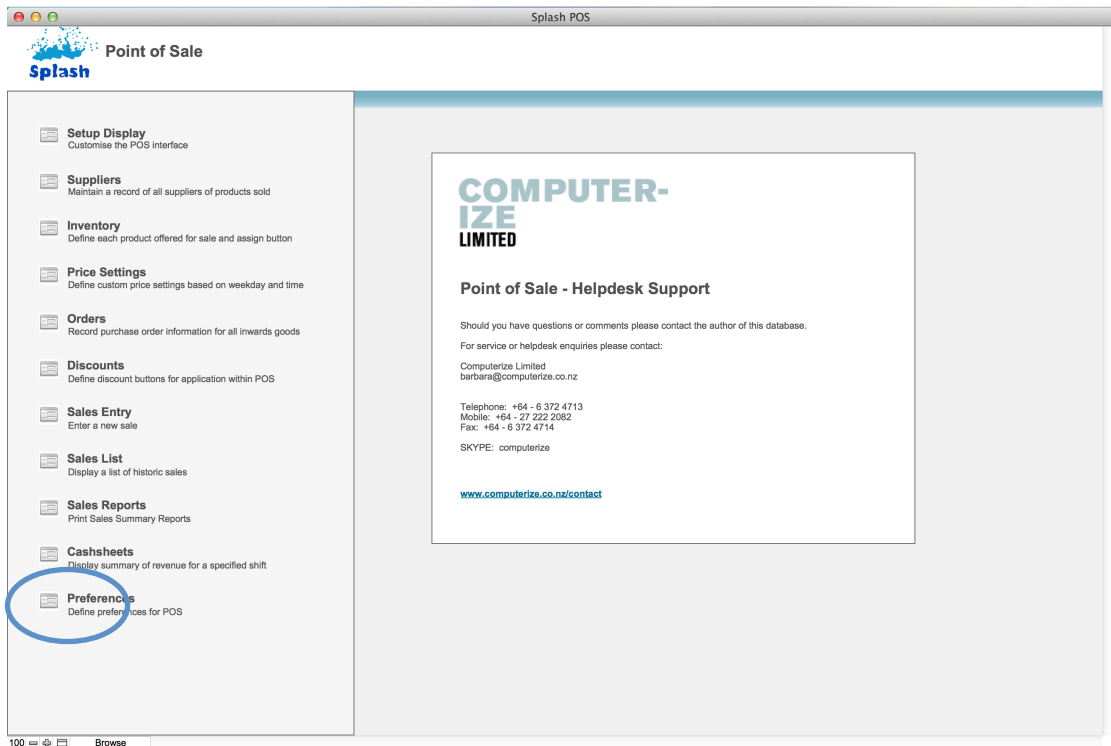


Updating Swim School Information

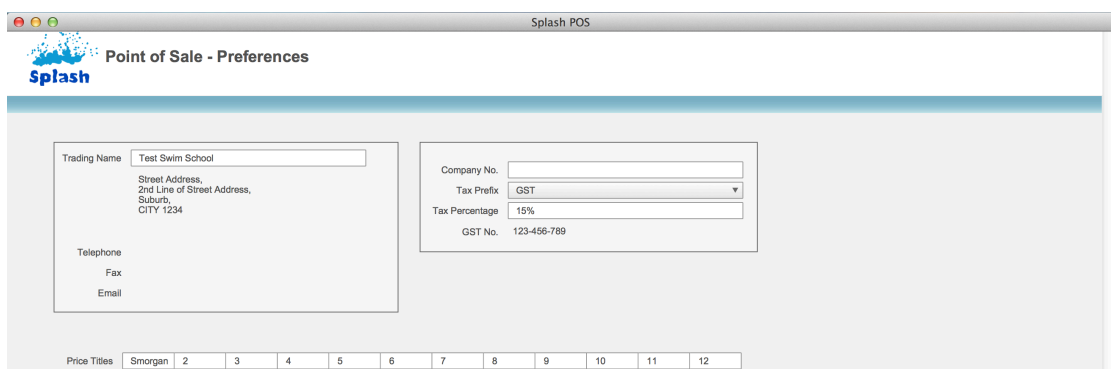
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Point of Sale** icon



3. Click once on the icon beside the word Preferences on the left of your screen.



4. The Point of Sale Preferences will be displayed on your screen
5. Complete your school trading name (it will be displayed on receipts) and your tax information.
6. Additional information about your Swim School can be updated in the Splash Preferences for School Details.



7. Complete as many fields as possible then click the Splash Menu button to return to the POS home screen. Your information is saved as you type.

NB: Remember to define your Tax Prefix (ABN – Australia ; GST – New Zealand) along with the current tax rate for your location.

The tax rate entered here will only be applied to nominated products, it will not be applied to all products.

Defining Point of Sale Locations

Locations are used to identify alternative interfaces for different workstations. Multiple workstations can share the same interface however in some instances you may wish to display a different interface for a different area of the business (a kiosk may use a different button configuration to the front desk).

When entering a Location you need to

- Define the Location name.
- Define the POS interface (button configuration).

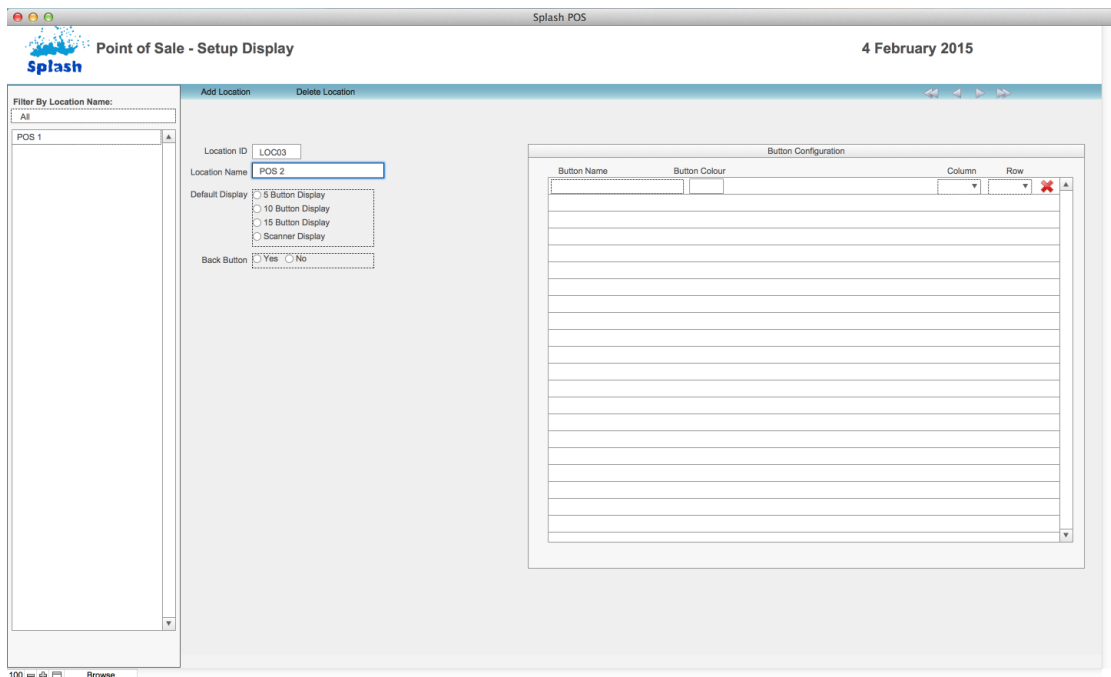
Entering a New Location

It may be easier to consider a location an interface design. Changing information in this screen will determine;

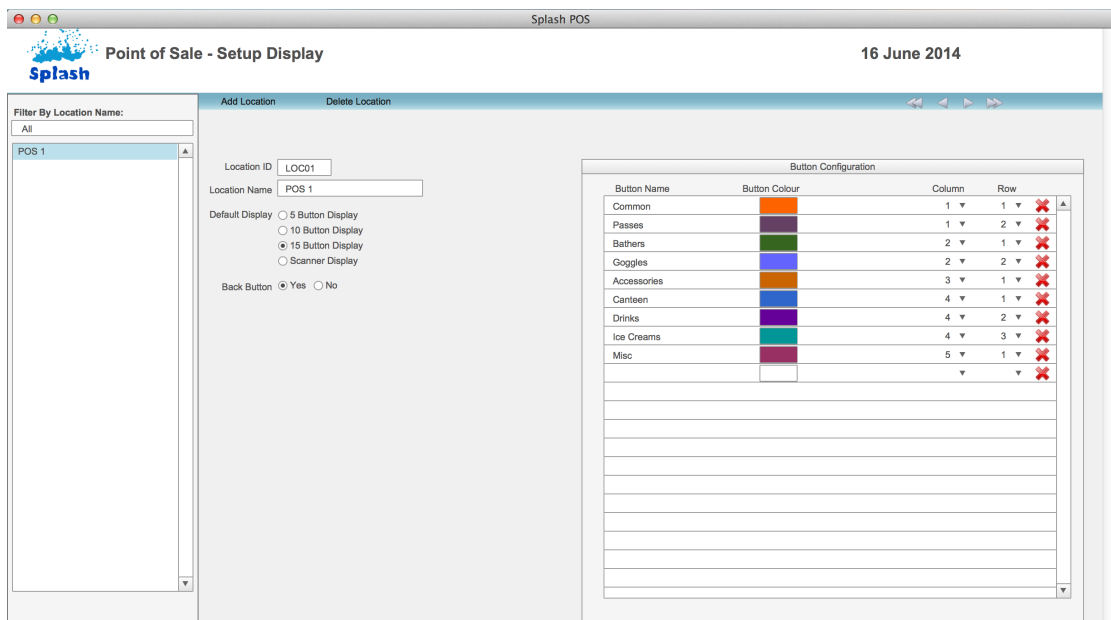
- which buttons are displayed when you process a payment,
- where the buttons will be positioned, and
- how each button will appear on the top left of the sales entry screen.
 1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
 2. Click once on the icon beside the word **Setup Display** on the left of your screen to display the Point of Sale Setup Display screen.

[illegible]

3. Click the **Add Location** button displayed in the blue stripe at the top of your screen to display a blank Location form.



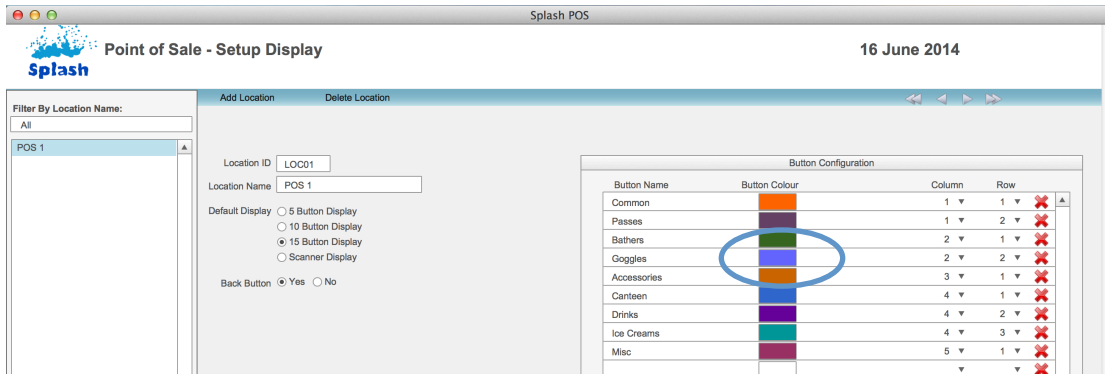
4. Define a Name for the required interface.
5. After entering the location defaults you now need to define the Button Configuration. The button configuration determines which buttons are displayed on the top left of your screen and their appearance.
6. The category buttons sit in a grid consisting of columns and rows. This screen gives you the ability to define each category button, its colour and the location it will sit within the grid.
7. Enter the names for each category button in the POS Interface fields at the right of the screen. Remember to define both the column and row where the button should reside.



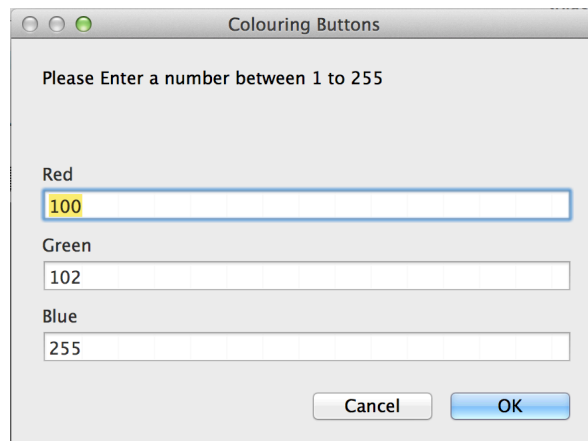
The above configuration would be displayed as follows;

Common	Bathers	Accessories	Canteen	Misc
Passes	Goggles		Drinks	
			Ice Creams	

8. Define the colour of each POS button by clicking the sample Button Colour.



9. Colours are defined using RGB settings. Enter numbers between 1 and 255 in the fields for Red (R), Green (G) and Blue (B). Click OK.



10. The colour representing the numbers you have entered will be displayed in the button configuration list.

11. Repeat steps 7 through 9 until the required buttons have been defined.

12. When you have finished click the Splash Menu button to return to the POS home screen. Your information is saved as you type.

NB: For a comprehensive list of colours see the RGB Colour Palette (page 392).

Displaying a Location

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Setup Display** on the left of your screen to display the Point of Sale Setup Display screen.

Point of Sale - Setup Display

16 June 2014

Filter By Location Name:

All

POS 1

Location ID: LOC01

Location Name: POS 1

Default Display: ☐ 5 Button Display ☐ 10 Button Display ☒ 15 Button Display ☐ Scanner Display

Back Button: ☒ Yes ☐ No

Button Name	Button Colour	Column	Row
Common		1	1
Passes		1	2
Bathers		2	1
Goggles		2	2
Accessories		3	1
Canteen		4	1
Drinks		4	2
Ice Creams		4	3
Misc		5	1

3. Use the list on the left of your screen to click once on the location you wish to display.

Filter By Location Name:

All

POS 1

Updating Location Details

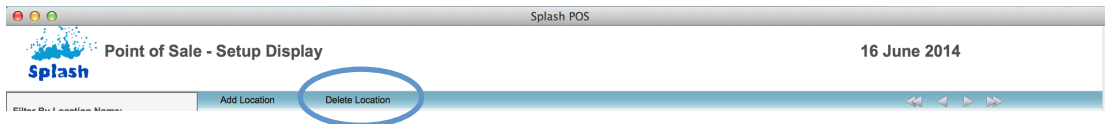
1. Use the **Displaying a Location** command to ensure the correct location is displayed on your screen.
2. Update any details as required.

Button Name	Button Colour	Column	Row
Common		1	1
Passes		1	2
Bathers		2	1
Goggles		2	2
Accessories		3	1
Canteen		4	1

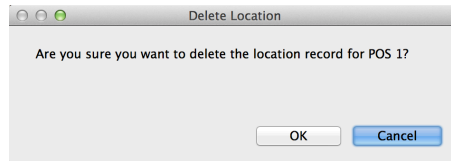
Deleting a Location Record

Location records can only be deleted in Setup Display. Deleting a Location will remove all POS interface settings for the selected Location.

1. Use the **Displaying a Location** command to ensure the correct location is displayed on your screen.
2. Click once on the **Delete Location** button displayed in the blue stripe at the top of your screen.



3. You will be asked to confirm you wish to delete the selected Location record.



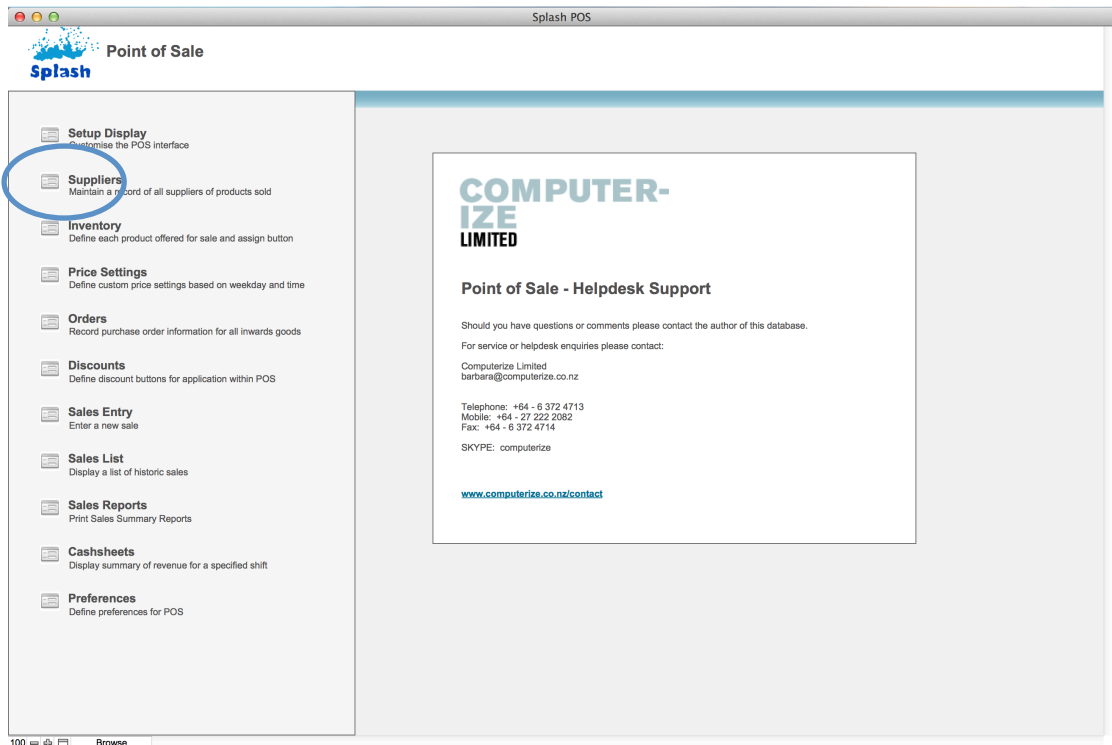
4. Click OK to delete the record, or Cancel to return to the form without making any changes.

Entering Supplier Information

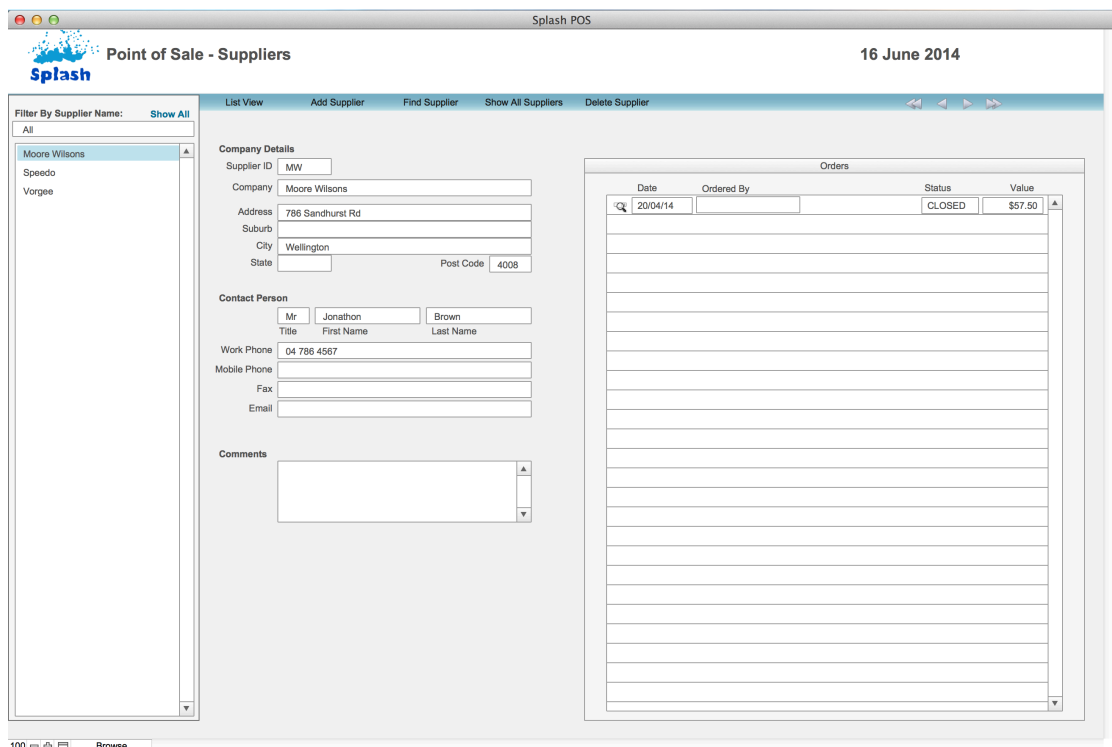
Although it is not essential for successful operation, it is recommended you create a supplier record for each company you will be purchasing stock from.

Entering a New Supplier

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Suppliers** on the left of your screen.



3. The Point of Sale – Suppliers screen will be displayed.



4. Click the **Add Supplier** button displayed in the blue stripe at the top of your screen to display a blank Supplier form.

5. Complete as many details as possible for the selected supplier.
6. When you have finished in the Supplier module, click the Splash Menu button to return to the POS home screen. Your information is saved as you type or when you exit the screen.

NB: Each supplier must be created with a unique ID

Displaying a List of Suppliers

Each record in your supplier module can be displayed in either a form view or as part of a list. List view displays all records in the found set.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Suppliers** on the left of your screen.
3. Click once on the **List View** button displayed in the blue stripe at the top of your screen.



4. All records in the found set will be displayed in the list.

Sort By	Contact	ID	Company Name	Contact	Telephone	Mobile	Email
MW	Moore Wilsons			Jonathon Brown	04 786 4567		
Spe	Speedo						
VOR	Vorgee						

NB: Display the detail of a selected supplier by clicking the magnifying glass displayed to the left of the Supplier ID.

NB: Sort the list in ascending order by selecting the sort order from the Sort By field.

Finding a Supplier

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Suppliers** on the left of your screen.
3. Click once on the **Find Supplier** button displayed in the blue stripe at the top of your screen.



4. The Search for a Supplier dialog box will be displayed on your screen.

A screenshot of the 'Search for a Supplier' dialog box. The dialog has a title bar with 'Splash POS' and a search icon. It contains several input fields: 'Supplier ID', 'Company', 'Contact Person', 'Address', 'Suburb', 'City', 'State', 'Post Code', 'Telephone', 'Mobile', and 'Email'. Each field has a magnifying glass icon next to it. At the bottom of the dialog are six buttons: 'Cancel', 'New Request', 'Omit Records', 'Constrain Set', 'Extend Set', and 'Find Now'.

5. Enter the criteria for your find in the appropriate field/s.
6. Press ENTER or click the **Find Now** button to complete the find.
7. If one record is located the record will be displayed on the Supplier form. If multiple records are located the found set will be displayed in the list view.

Updating Supplier Details

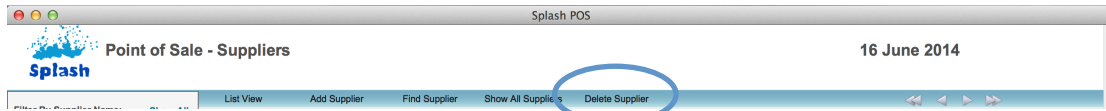
1. Use the **Finding a Supplier** command to ensure the correct supplier record is displayed on your screen.
2. Update any details as required.

NB: A supplier ID should not be changed after stock has been entered and orders have been placed. Changing the Supplier ID will remove all links to previous orders.

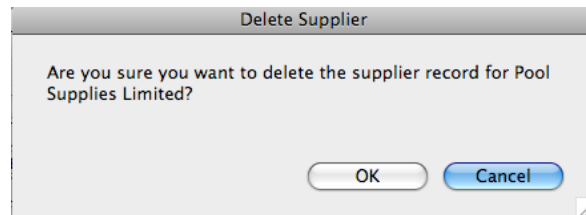
Deleting a Supplier Record

Supplier records can be deleted from within either the Supplier entry form or list view.

1. Use the **Finding a Supplier** command to ensure the correct supplier record is displayed on your screen.
2. If working in List View, click the goggles to display the relevant Supplier entry form.
3. Click once on the **Delete Supplier** button displayed in the blue stripe at the top of your screen.



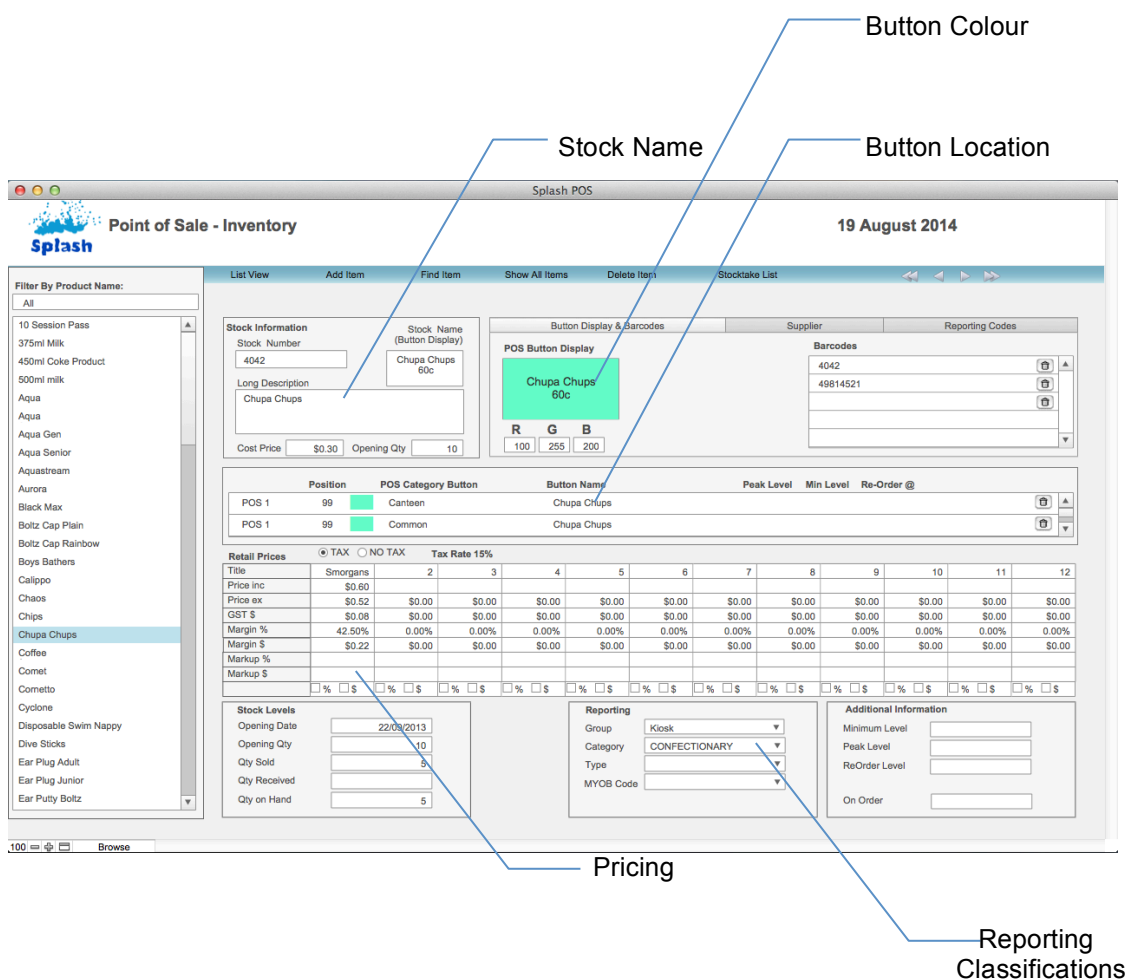
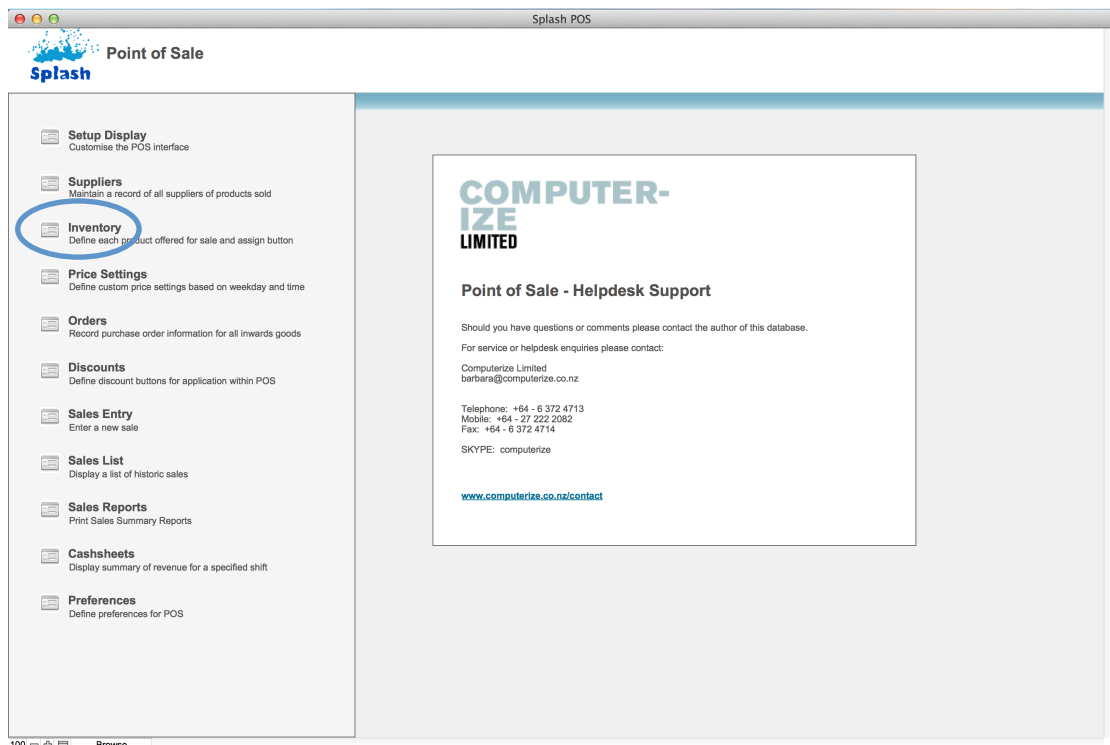
4. You will be asked to confirm you wish to delete the selected Supplier record.



5. Click OK to delete the record, or Cancel to return to the supplier form without making any changes.

Managing Inventory

Splash POS recognises all bookings as products within a sale. In addition to bookings you may need to process products for sale through the POS system. This section of the manual guides you through entering the products you wish to sell.



Entering an Inventory Item

Entering a new stock item is a five-step process. All five steps should be completed when a new item is created.

1. Define the stock item name
2. Define the button colour
3. Define the location for the POS button
4. Define the price of the product
5. Define the classifications for reporting

Each of the above steps is completed within the Point of Sale – Inventory screen. When you have completed all of the above steps the stock item will be available for use in the sale entry screen.

The screenshot shows the 'Point of Sale - Inventory' screen in the Splash POS application. The interface includes a sidebar with a product list, a main area for item details, and a bottom section for reporting and stock levels. The 'Chupa Chups' item is selected, showing its stock number, cost price, and opening quantity. The 'POS Button Display' section shows the button name and color. The 'Retail Prices' table lists various items and their prices. The 'Stock Levels' section shows the opening date, opening quantity, and quantity sold. The 'Reporting' section shows the group, category, type, and MYOB code. The 'Additional Information' section shows the minimum level, peak level, re-order level, and on-order quantity.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **POS** icon

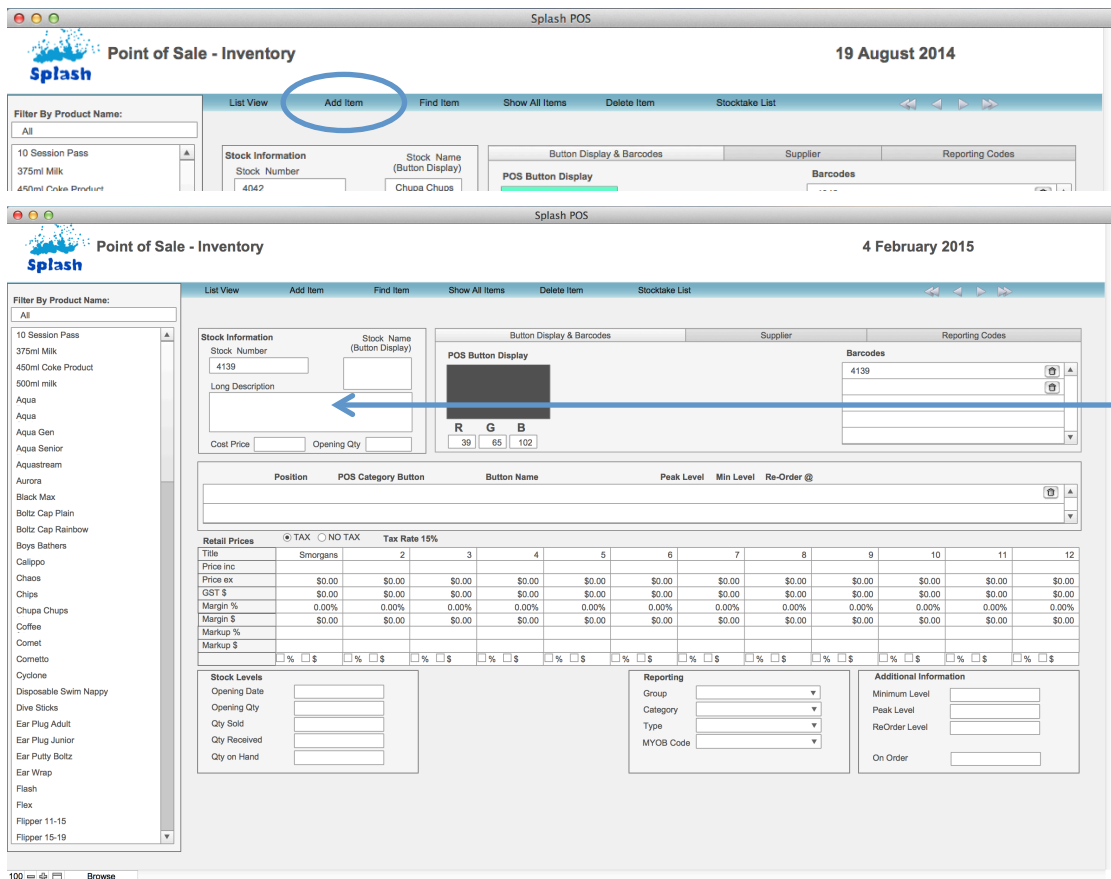


1. Defining a New Stock Item

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Inventory** on the left of your screen.

The screenshot shows the 'Point of Sale' screen in the Splash POS application. The sidebar on the left contains navigation icons for 'Setup Display', 'Suppliers', 'Inventory', 'Price Settings', and 'Orders'. The 'Inventory' icon is circled in red. The main area displays the 'COMPUTERIZE LIMITED' logo and the 'Point of Sale - Helpdesk Support' text.

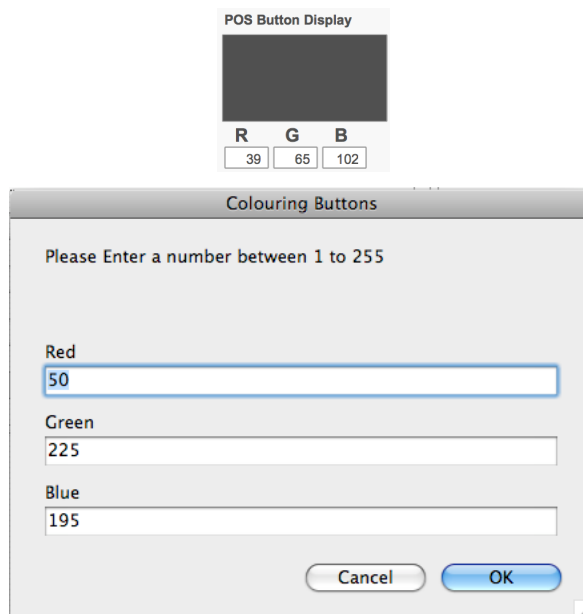
3. Click the **Add Item** button displayed in the blue stripe at the top of your screen to display a blank Inventory form.



4. Enter the Stock Name and Long description for the item you wish to sell.

2. Defining the Button Colour

5. Click once on the grey button displayed on your screen to display the Colouring Buttons dialog.



6. Enter numbers between 1 and 255 within the fields for Red (R), Green (G) and Blue (B). See the RGB colour palette (page 392) of this document for a selection of colours. Click OK.
7. The button will be displayed as it will appear in the sale entry screen.

Button Display & Barcodes	Supplier	Reporting Codes
<div>POS Button Display</div> <div>Chupa Chups 60c</div> <div>R 100 G 255 B 200</div>		
<div>Barcodes</div> <div>4042</div> <div>49814521</div>		

NB: Add the price to the button name if you would like to have the price displayed without selecting the item.

3. Defining the POS Button Location

Position	POS Category Button	Button Name	Peak Level	Min Level	Re-Order @
POS 1	99	Canteen	Chupa Chups		
POS 1	99	Common	Chupa Chups		

1. Select the POS Location (interface) the button should appear in using the drop-down menu provided. Repeat this step for as many locations as required.

Position	POS Category Button	Button Name	Peak Level	Min Level	Re-Order @
POS 1	99	Canteen	Chupa Chups		
POS 1	99	Common	Chupa Chups		

2. Choose the category the button will appear within by selecting it from the POS button drop-down menu.

Position	POS Category Button	Button Name	Peak Level	Min Level	Re-Order @
POS 1	99	Canteen	Chupa Chups		
POS 1	99	Common	Chupa Chups		

Position	POS Category Button	Button Name	Peak Level	Min Level	Re-Order @
POS 1	99	Canteen	Chupa Chups		
POS 1	99	Common	Chupa Chups		

4. Defining the Price of the Product

1. Click the Tax Rate button to define whether the item attracts GST or not.
2. Define the retail price (price inc) of the selected product.

Retail Prices	TAX	NO TAX	Tax Rate 15%												
Title	Smorgans	2	3	4	5	6	7	8	9	10	11	12			
Price inc	\$0.60														
Price ex	\$0.52	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
GST \$	\$0.08	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
Margin %	42.50%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%			
Margin \$	\$0.22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
Markup %															
Markup \$															

3. This screen is vital to successful calculation of GST and for monitoring stock levels.

5. Defining Reporting Options

4. When you first create a product remember to enter the current number of items held in stock. If you are about to place your first order, enter zero in the opening quantity field.

Stock Levels Opening Date: 22/09/2013 Opening Qty: 10 Qty Sold: 5 Qty Received: Qty on Hand: 5	Reporting Group: Kiosk Category: CONFECTIONARY Type: MYOB Code:	Additional Information Minimum Level: Peak Level: ReOrder Level: On Order:
--	--	---

5. The Group, Category, and Type fields are used for reporting purposes only. All sales can be summarised by each of the three classifications.

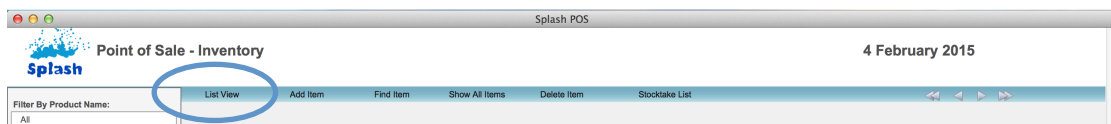
Displaying a List of Inventory items

Each item of inventory can be displayed in either a form view or as part of a list. List view displays all records in the found set. Two list options have been provided within the POS system; Standard List and Stocktake List

Listing Stock Items

This list contains a list of each inventory item along with the reporting classifications for each product. It also displays the current stock levels and the last counted value.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Inventory** on the left of your screen.
3. Click once on the **List View** button displayed in the blue stripe at the top of your screen.



4. All records in the found set will be displayed in the list.

A screenshot of the 'Stocktake List' table in the Splash POS system. The table has columns for Stock No, Stock Name, Supplier, Group, Category, Type, Counted, System Qty, and Variance. The data is as follows:

Stock No	Stock Name	Supplier	Group	Category	Type	Counted	System Qty	Variance
2979	Lap Swim		Lap Swim	Lap Swim	Pass	-3	-3	
4024	Lap Swim Senior		Lap Swim	Lap Swim	Pass			
4025	Lap Swim U15		Lap Swim	Lap Swim	Pass	-2	-2	
4026	Lap Pass		Lap Swim	Lap Swim	Pass	-1	-1	
4027	Sen Lap Pass		Lap Swim	Lap Swim	Pass			
4028	Aqua Gen		Aqua	Aqua	Pass			
4029	Aqua Senior		Aqua	Aqua	Pass			
4030	Aqua Pass		Aqua	Aqua	Pass			
4031	Aqua Senior Pass		Aqua	Aqua	Pass	-2	-2	
4032	Girls Bathers	Spe	Speedo	Bathers	Girls	-4	-4	
4033	Ladies Bathers	Spe	Speedo	Bathers	Ladies	10	10	

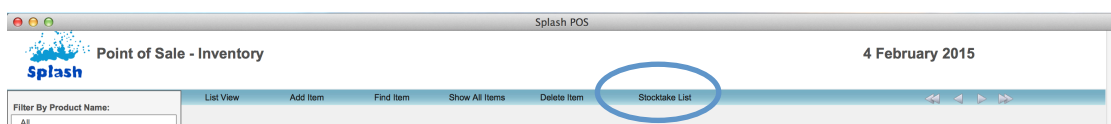


NB: Display the detail for a selected item by clicking the magnifying glass displayed to the left of the Stock No.

Listing Stocktake Results

This list contains a list of products including the current stock level and the most recent stocktake count. It also contains the variance between on hand and counted values.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Inventory** on the left of your screen.
3. Click once on the **Stocktake List** button displayed in the blue stripe at the top of your screen.



4. All records in the found set will be displayed in the list.

Splash POS

Point of Sale - Stocktake Listing

4 February 2015

Sort By: Group

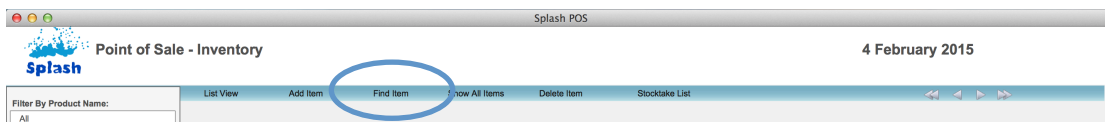
Detail View Add Item Find Item Show All Items Delete Item Print Stocktake List

Stock No	Stock Name	Supplier	Opening	Sold	On Hand	Variance
2979	Lap Swim			3	-3	
4025	Lap Swim			2	-2	
4026	Lap Pass			1	-1	
4031	Aqua Senior			2	-2	
4032	Girls Bathers	Spe Speedo		4	-4	
4033	Ladies Bathers	Spe Speedo			10	
4034	Boys Bathers	Spe Speedo		1	-1	
4035	Mens Bathers	Spe Speedo			0	
4041	Freddo Frog	MW Moore Wilsons		1	-1	
4042	Chupa Chups	MW Moore Wilsons	10	5	5	

NB: Sort the list in ascending order by clicking the drop-down menu in the top left corner of your screen.

Finding Inventory Items

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Inventory** on the left of your screen.
3. Click once on the **Find** button displayed in the blue stripe at the top of your screen.



4. The **Search for an Inventory Item** dialog box will be displayed on your screen.

Search for an Inventory Item

Stock No.

Stock Name

Long Description

Supplier

Group

Category

Type

Cost Price Opening Qty

Sell Price Qty Received

Tax Qty Sold

Tax Rate On Order

Cancel New Request Omit Records Constrain Set Extend Set Find Now

5. Enter the criteria for your find by typing your request in the corresponding field/s.
6. Click the **Find Now** button.

7. If one record is located the record will be displayed on the Inventory detail screen. If multiple records are located the found set will be displayed in the list view.

Displaying Inventory items in the Portal

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Inventory** on the left of your screen.
3. The Inventory data entry screen will be displayed, enter the name (or part thereof) of the product you wish to display in the filter field at the top of the portal list on the left of your screen.
4. Click once on the product item you wish to update.
5. The portal row will be highlighted to indicate the active record. The details of the selected inventory item will be displayed on the right of your screen.

Point of Sale - Inventory 9 February 2015

Filter By Product Name: All

10 Session Pass
375ml Milk
450ml Coke Product
500ml milk
Aqua
Aqua Gen
Aqua Senior
AquaStream
Aurora
Black Max
Boltz Cap Plain
Boltz Cap Rainbow
Boys Bathers
Callippo
Chaos
Chips
Chupa Chups
Coffee
Comet
Cometto
Cyclone
Disposable Swim Nappy
Dive Sticks
Ear Plug Adult
Ear Plug Junior
Ear Putty Boltz

Stock Information
Stock Number: 4074
Stock Name (Button Display): Boltz Cap Plain
Long Description: Boltz Silicone Cap
Cost Price: Opening Qty:

Button Display & Barcodes
POS Button Display: Boltz Cap Plain
R: 0 G: 204 B: 255
Barcodes: 4074

Supplier
Reporting Codes

Position POS 1 **POS Category** Accessories **Button Name** Boltz Cap Plain **Peak Level** **Min Level** **Re-Order @**

Retail Prices TAX: NO TAX Tax Rate 15%

Title	Smorgans	2	3	4	5	6	7	8	9	10	11	12
Price inc	\$9.95											
Price ex	\$8.65	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
GST \$	\$1.30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Margin %	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Margin \$	\$8.65	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Markup %												
Markup \$												

Stock Levels
Opening Date: 22/09/2013
Opening Qty:
Qty Sold:
Qty Received:
Qty on Hand:

Reporting
Group:
Category:
Type:
MYOB Code:

Additional Information
Minimum Level:
Peak Level:
ReOrder Level:
On Order:

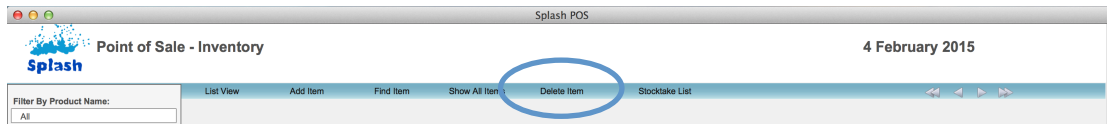
Updating Inventory Details

1. Use the **Finding Inventory items** instructions (or select the item in the portal) to locate the record you wish to update.
2. The Inventory entry form should be displayed on your screen.
3. Update any details as required.

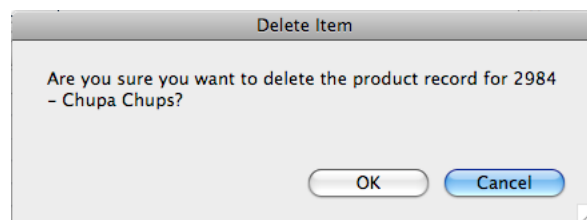
Deleting an Inventory Item

Inventory items can be deleted from within either the Inventory entry form or list view. Anyone who has access to POS administration has the ability to remove an inventory item.

1. Use the **Finding Inventory Items** instructions (or select the item in the portal) to locate the record you wish to delete.
2. Click once on the **Delete Item** button displayed in the blue stripe at the top of your screen.



3. You will be asked to confirm you wish to delete the selected Inventory item.



4. Click **OK** to delete the record, or **Cancel** to return to the inventory item form without making any changes.

Defining Price Levels

Price settings provide the ability to customise the price for each inventory item based on the location, the weekday and time it is sold e.g. you may elect to reduce the price of a specific product at peak times. Price Settings in Splash POS will ensure the correct price is applied to an item when a sale is made. When creating a new price level you need to

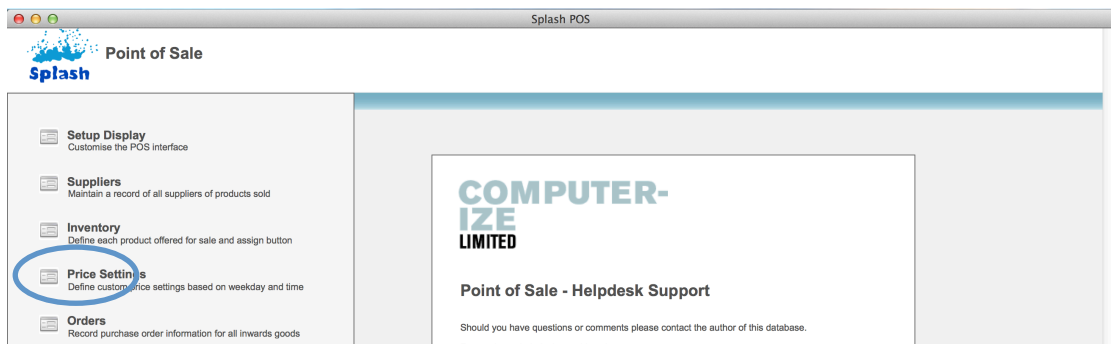
- Define the location the price level applies to.
- Define the weekday and timeframe when the price should be applied.
- Update the inventory item to ensure there is a price displayed in the related Price Level column.

Entering a New Price Level

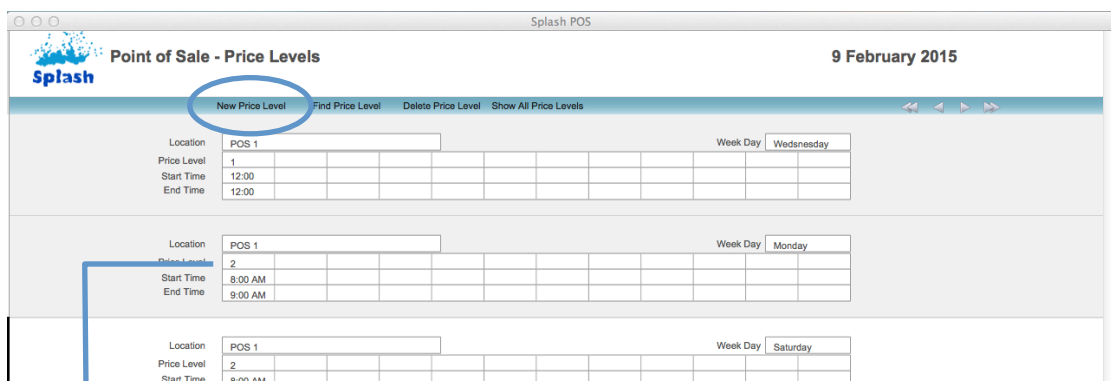
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **POS** icon



3. POS administration options will be displayed on your screen.



4. Click once on the **Price Settings** button to display the Price Settings entry form.
5. Click the **New Price Level** button displayed in the blue stripe at the top of your screen to display a blank Location form.

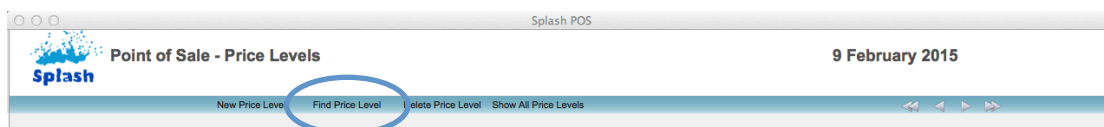


6. Describe where and when the special pricing should be applied by entering the Location, Weekday and Start-End times for the specified price level.
7. Exit the price level screen and return to inventory to ensure a price has been entered for the selected Price Level.

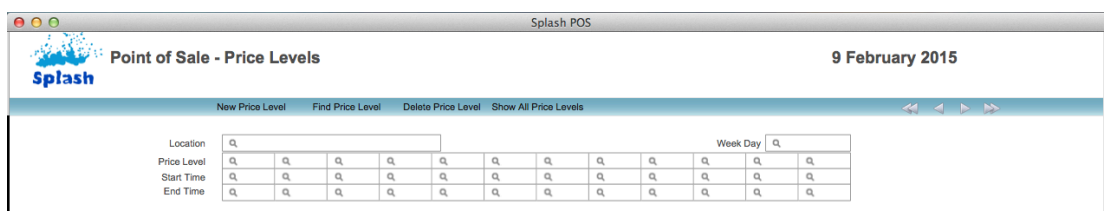
Retail Prices		TAX		Tax Rate 15%													
Title		Emergence	2	3	4	5	6	7	8	9	10	11	12				
Price inc	\$4.00	\$3.00															
Price ex	\$3.48	\$3.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00				
GST \$	\$0.52	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00				
Margin %	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%				
Margin \$	\$3.48	\$3.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00				
Markup %																	
Markup \$																	

Finding a Price Level Entry

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Price Settings** on the left of your screen.
3. Click the **Find Price Level** button displayed in the blue stripe at the top of your screen to display a blank Location form.



4. The Point of Sale – Price Levels screen will change to find mode (small magnifying glasses will be displayed in each field).



5. Enter the criteria for your find in the appropriate field/s.
6. Press ENTER to complete the find.

Updating Price Level Details

1. Use the **Finding a Price Level Entry** command to locate the record you wish to update.
2. The Price Level entry form should be displayed on your screen.
3. Update any details as required.

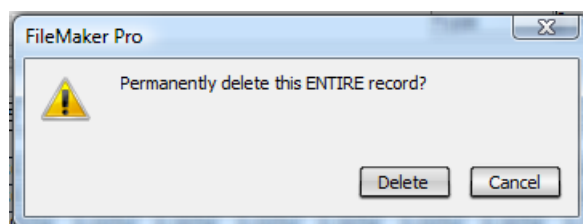
Deleting a Price Level Record

Price Setting records can be deleted from the Price Level entry form. Deleting a Price Level will prevent Splash from applying a special price when a sale is made.

1. Ensure the appropriate Price Level record is displayed on your screen.
2. Click once on the **Delete Price Level** button displayed in the blue stripe at the top of your screen.



3. You will be asked to confirm you wish to delete the selected Price Level record.



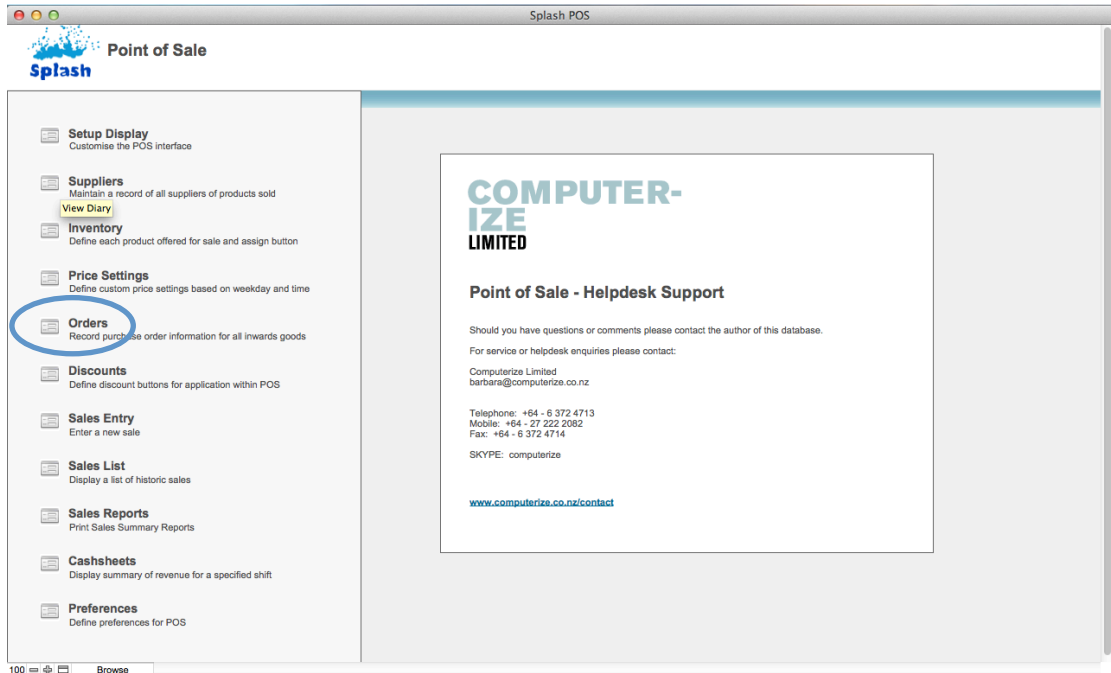
4. Click Delete to remove the record, or Cancel to return to the Price Level form without making any changes.

Ordering New Stock

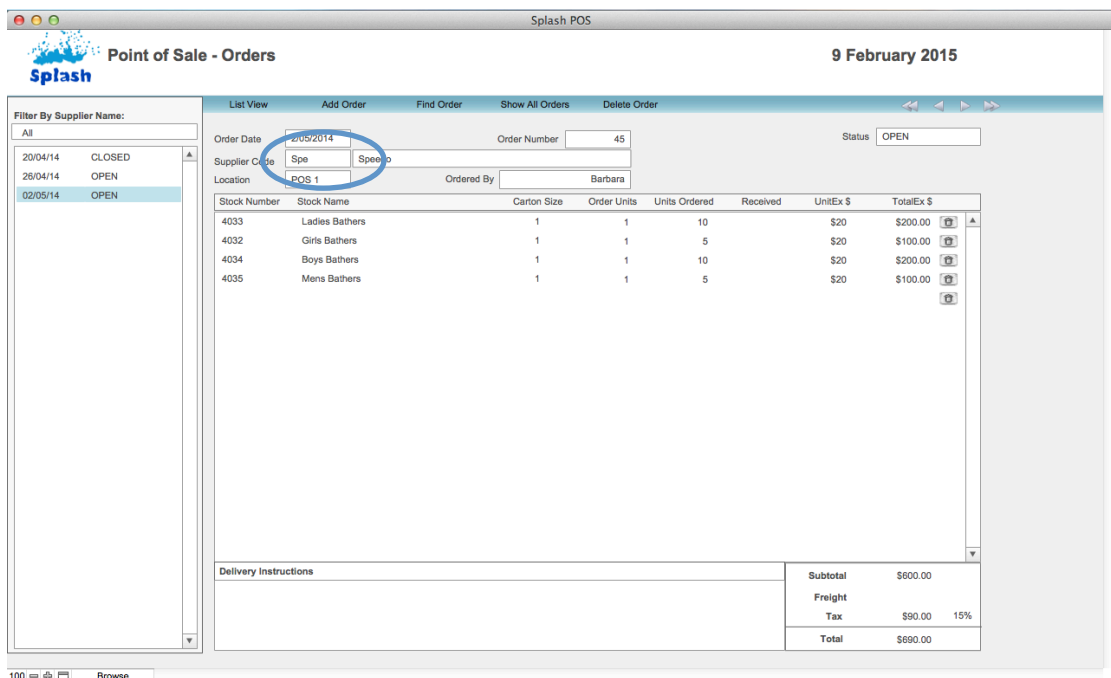
To ensure correct inventory levels are maintained within Splash POS all new stock should be receipted into your POS system. This involves generating a purchase order whenever new stock is either ordered or received. Correct use of Inventory and Orders allows you to correctly monitor your stock levels.

Creating a New Order

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Orders** on the left of your screen.



3. Click the **Add Order** button displayed in the blue stripe at the top of your screen to display a blank Order form.



4. Define which supplier the order is being placed with by selecting the supplier ID from the drop-down menu provided.

5. Use the Location drop-down menu to define the location the stock items will be added to.
6. The Stock Number field will display a list of items sold by the selected supplier. Select the item/s you wish to order by choosing each item from the drop-down menu provided.

7. Enter the required number of items in the Units Ordered column.
8. Click the POS Menu button to complete the entry and return to the POS home screen.

Displaying a List of Orders

Each record in the Purchase Order module can be displayed in either the form view or as part of a list. List view displays all records in the found set.

1. Ensure the POS Administration options are displayed on your screen.
2. Click once on the icon beside the word **Orders** on the left of your screen.
3. The Order entry screen will be displayed.
4. Click once on the **List** button displayed in the blue stripe at the top of your screen.

5. All records in the found set will be displayed on your screen.

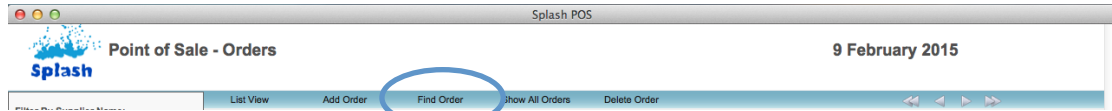
Sort By	Date	Order No.	Supplier	Status	Supplier Inv	Order Total	Ordered By
	20/4/2014	43	Moore Wilsons	CLOSED		\$57.50	
	26/4/2014	44	Speedo	OPEN		\$0.00	
	2/5/2014	45	Speedo	OPEN		\$690.00	Barbara

NB: Display the detail of a selected order by clicking the magnifying glass displayed to the left of the Order Date.

NB: Sort the list in ascending order by selecting the sort by drop-down menu on the top left corner of your screen.

Finding a Purchase Order

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click the icon to the left of the word **Orders** on the left of your screen.
3. Click once on the **Find Order** button displayed in the blue stripe at the top of your screen.



4. The Search for an Order dialog box will be displayed on your screen.

A screenshot of the 'Search for an Order' dialog box. The title bar says 'Search for an Order' with a magnifying glass icon. The dialog contains several search criteria fields, each with a magnifying glass icon: 'Supplier ID' (with a dropdown arrow), 'Supplier' (with a dropdown arrow), 'Order Date' (with a dropdown arrow), 'Order No.' (with a dropdown arrow), 'Ordered By' (with a dropdown arrow), and 'Status' (with a dropdown arrow). Below these fields is a section titled 'Order Items' which contains four fields: 'Stock No' (with a dropdown arrow), 'Stock Name' (with a dropdown arrow), 'Qty Ordered' (with a dropdown arrow), and 'Qty Received' (with a dropdown arrow). At the bottom of the dialog, there are several buttons: 'Cancel', 'New Request', 'Omit Records', 'Constrain Set', 'Extend Set', and 'Find Now' (with a magnifying glass icon).

5. Enter the criteria for your find in the appropriate field/s.
6. Press ENTER or click the **Find Now** button to complete the find.
7. If one record is located the record will be displayed on the Order form. If multiple records are located the found set will be displayed in the list view.

Updating an Existing Order

1. Use the **Finding a Purchase Order** command to locate the Purchase Order you wish to update.
2. The Order entry form should be displayed on your screen.
3. Update any details as required.

NB: There are some restrictions on what can be updated after an order has been closed.

Receiving Items Into Stock

1. Use the **Finding a Purchase Order** command to locate the Purchase Order you wish to update.
2. The Order entry form should be displayed on your screen.

Point of Sale - Orders 9 February 2015

Filter By Supplier Name: All

Order Date: 2/05/2014 Order Number: 45 Status: OPEN

Supplier Code: Spe Location: POS 1 Ordered By: Barbara

Stock Number	Stock Name	Carton Size	Order Units	Units Ordered	Received	UnitEx \$	TotalEx \$
4033	Ladies Bathers	1	1	10	10	\$20	\$200.00
4032	Girls Bathers	1	1	5	5	\$20	\$100.00
4034	Boys Bathers	1	1	10	10	\$20	\$200.00
4035	Mens Bathers	1	1	5	5	\$20	\$100.00

Subtotal: \$600.00
 Freight: \$90.00
 Tax: 15%
 Total: \$690.00

3. Enter the quantity received for each stock item
4. Click the Splash Menu button or select another order to update the entry and return to the POS home screen.

Point of Sale - Inventory 9 February 2015

Filter By Product Name: All

Stock Information: Stock Number 4033 Stock Name (Button Display) Ladies Bathers

Long Description: Ladies Bathers

Cost Price: Opening Qty:

POS Button Display: Ladies Bathers

Supplier: 4033

Reporting Codes:

Position	POS Category Button	Button Name	Peak Level	Min Level	Re-Order @
POS 1	99	Bathers	Ladies Bathers		

Retail Prices: TAX NO TAX Tax Rate 15%

Title	Smorgans	2	3	4	5	6	7	8	9	10	11	12
Price Inc												
Price ex	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
GST \$	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Margin %	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Margin \$	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Markup %												
Markup \$												

Stock Levels: Opening Date: 21/09/2013 Opening Qty: Qty Sold: Qty Received: 10 Qty on Hand: 10

Reporting: Group: Bathers Category: Ladies Type: Bathers MYOB Code:

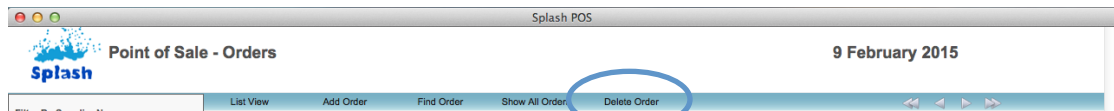
Additional Information: Minimum Level: Peak Level: ReOrder Level: On Order: 0

NB: The Qty Received field in the Inventory item record will be updated when new stock is received as per the above instructions.

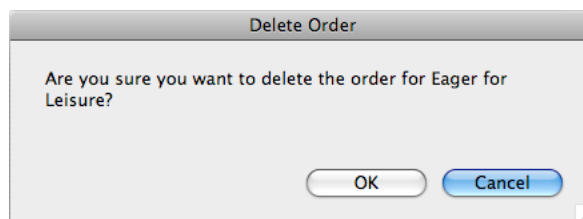
Deleting a Purchase Order

Purchase order records can be deleted from within either the Order entry form or list view. They can only be deleted if the stock has not been received.

1. Use the **Finding a Purchase Order** command to locate the Purchase Order you wish to update.
2. The Order entry form should be displayed on your screen.
3. If working in List View, click the magnifying glass to display the Order entry form.
4. Click once on the **Delete Order** button displayed in the blue stripe at the top of your screen.



5. You will be asked to confirm you wish to delete the selected Purchase Order record.



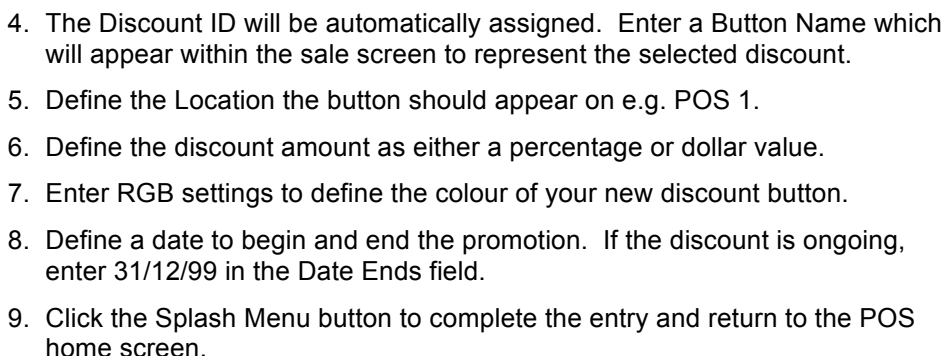
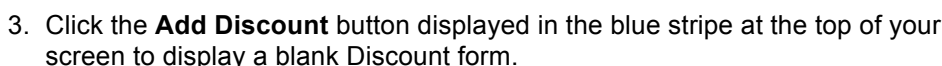
6. Click OK to delete the record, or Cancel to return to the Order form without making any changes.

NB: You cannot delete an order if items have already been received into stock.



Discount buttons can be used to apply preset discounts as either amounts or percentages to products during the sale process. Discount buttons can only be used with the sale of products. See the bookings guide for applying a lesson discount.

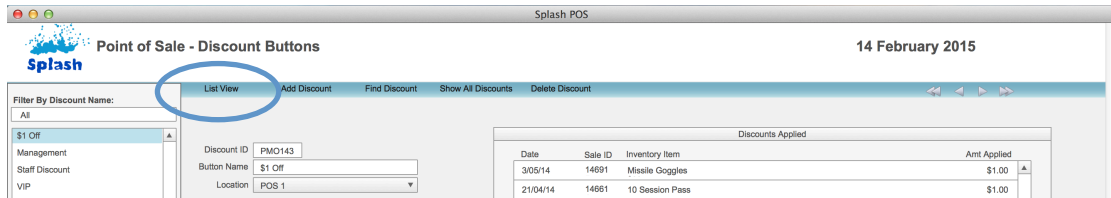
1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Discounts** on the left of your screen.



Displaying a List of Discount Buttons

Each record in your Discount module can be displayed in either the form view or as part of a list. List view displays all records in the found set.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Discounts** on the left of your screen.
3. Click once on the **List View** button displayed in the blue stripe at the top of your screen.



4. All records in the found set will be displayed in the list.

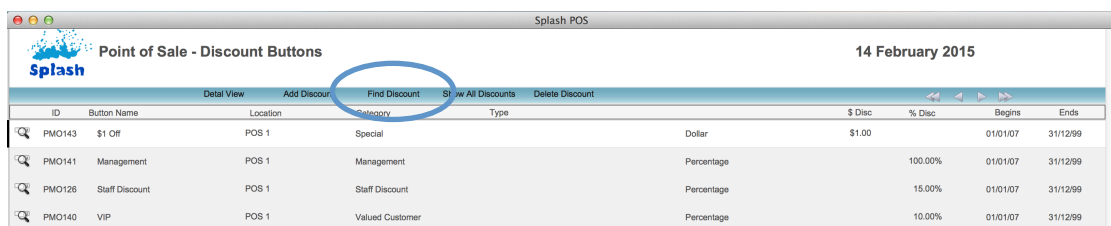
The screenshot shows the 'Point of Sale - Discount Buttons' window with the 'List View' button selected. The main area displays a table of discount buttons. The table has columns: ID, Button Name, Location, Category, Type, \$ Disc, % Disc, Begins, and Ends.

ID	Button Name	Location	Category	Type	\$ Disc	% Disc	Begins	Ends
PMO143	\$1 Off	POS 1	Special	Dollar	\$1.00		01/01/07	31/12/99
PMO141	Management	POS 1	Management	Percentage		100.00%	01/01/07	31/12/99
PMO128	Staff Discount	POS 1	Staff Discount	Percentage		15.00%	01/01/07	31/12/99
PMO140	VIP	POS 1	Valued Customer	Percentage		10.00%	01/01/07	31/12/99

NB: Display the detail of a selected discount button by clicking the magnifying glass displayed to the left of the record ID.

Finding a Discount Button

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Discounts** on the left of your screen.
3. Click once on the **Find Discount** button displayed in the blue stripe at the top of your screen.



4. The **Search for a Discount Button** dialog box will be displayed on your screen.

Search for a Discount Button

Promo ID

Button Name

Location

Category

Discount Type

Percent Off

Dollar Off

Date Begins

Date Ends

Requested By

Authorised By

Buttons: Cancel, New Request, Omit Records, Constrain Set, Extend Set, Find Now

5. Enter the criteria for your find in the appropriate field/s.
6. Press ENTER or click the **Find Now** button to complete the find.

Updating Discount Button Details

1. Use the **Finding a Discount Button** instructions to locate the record you wish to update.
2. The Discount Button entry form should be displayed on your screen.
3. Update any details as required.

NB: Amending an existing discount button will only affect future use of the button. All existing transactions will not be affected.

Deleting a Discount Button

Discount Button records can be deleted from within either the entry form or list view.

1. Use the **Finding a Discount Button** instructions to locate the record you wish to delete.
2. Ensure the appropriate Discount Button record is displayed on your screen.
3. If working in List View, click the magnifying glass to display the Discount Button entry form.
4. Click once on the **Delete Discount** button displayed in the blue stripe at the top of your screen.

Point of Sale - Discount Buttons 14 February 2015

Filter By Discount Name: All

Discount ID: PMO143

Button Name: \$1 Off

Location: POS 1

Date	Sale ID	Inventory Item	Amt Applied
3/05/14	14691	Missile Goggles	\$1.00
21/04/14	14661	10 Session Pass	\$1.00

5. You will be asked to confirm you wish to delete the selected record.

Delete Discount

Are you sure you want to delete the discount button for Staff Discount?

Buttons: OK, Cancel

6. Click OK to delete the record, or Cancel to return to the Discount form without making any changes.

Reviewing Discounted Sale Items

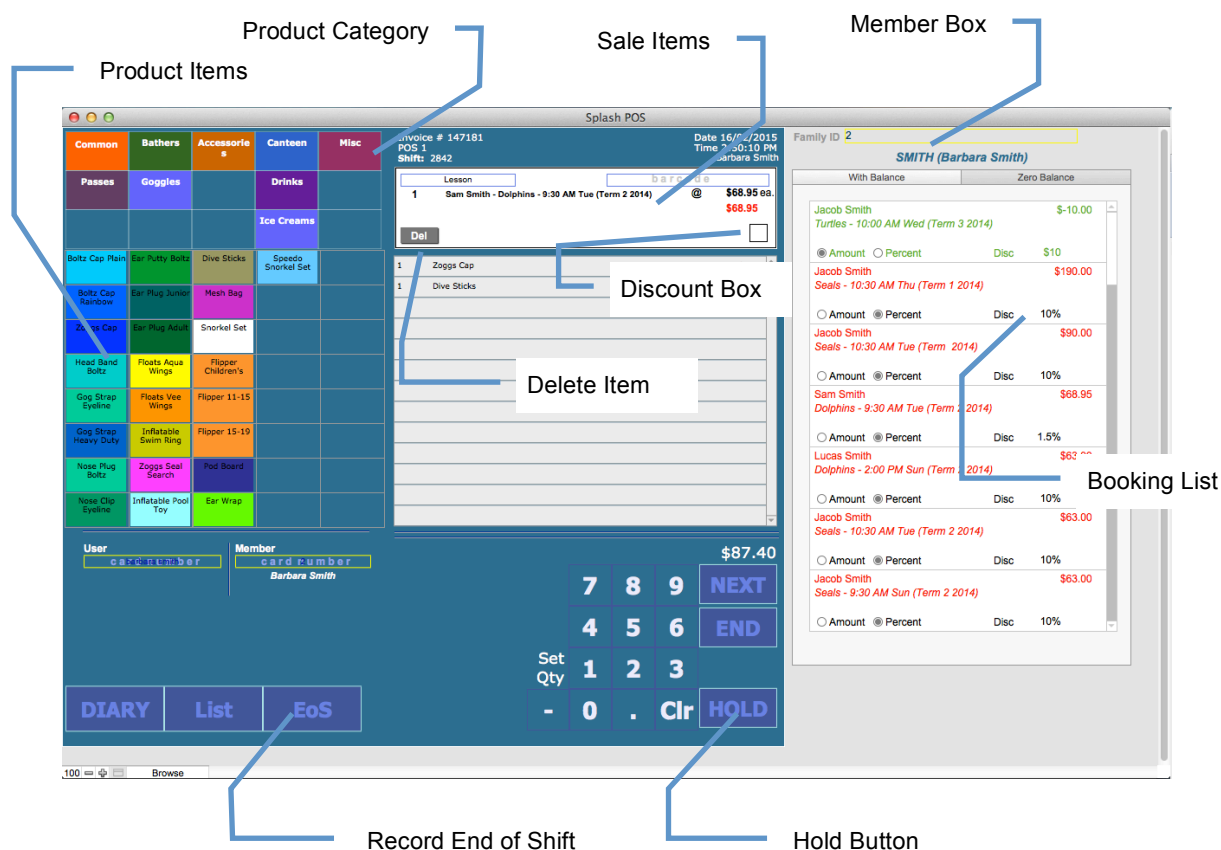
Splash POS maintains a history of all discounted items. This section of the manual describes how you can review the discounts which have been applied.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Discounts** on the left of your screen.
3. Use the **Finding a Discount** instructions to locate the record you wish to review.
4. All instances where the discount button has been used will be displayed within the portal on the right of the screen.

[illegible]

Entering Sales and Processing Payments

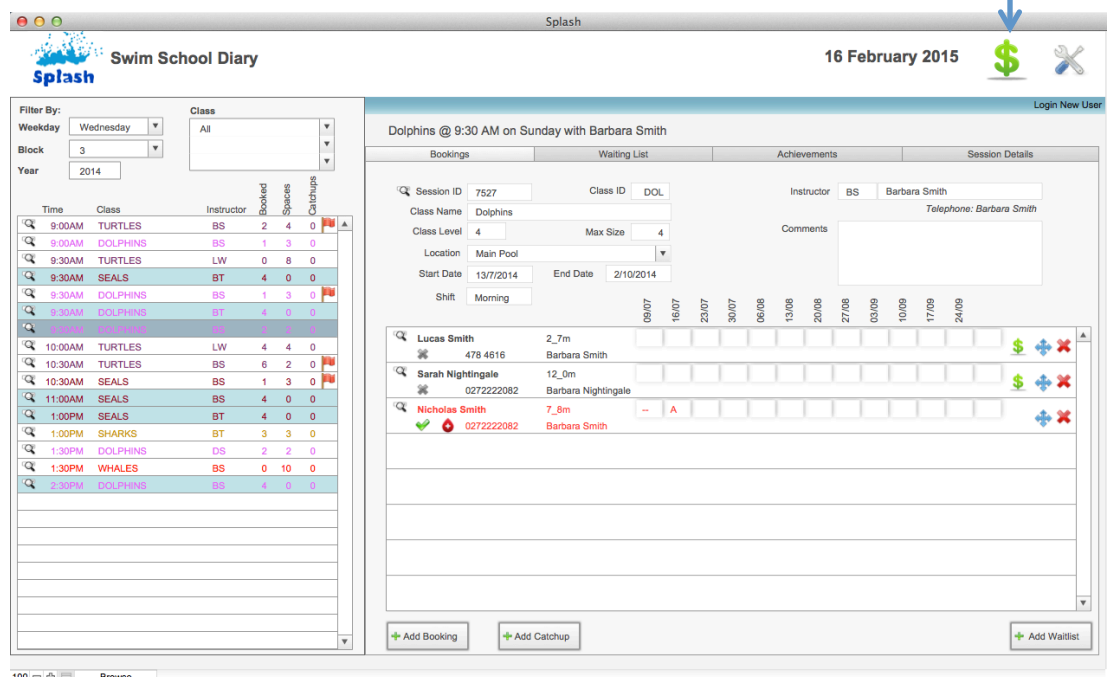
Parts of the POS Window



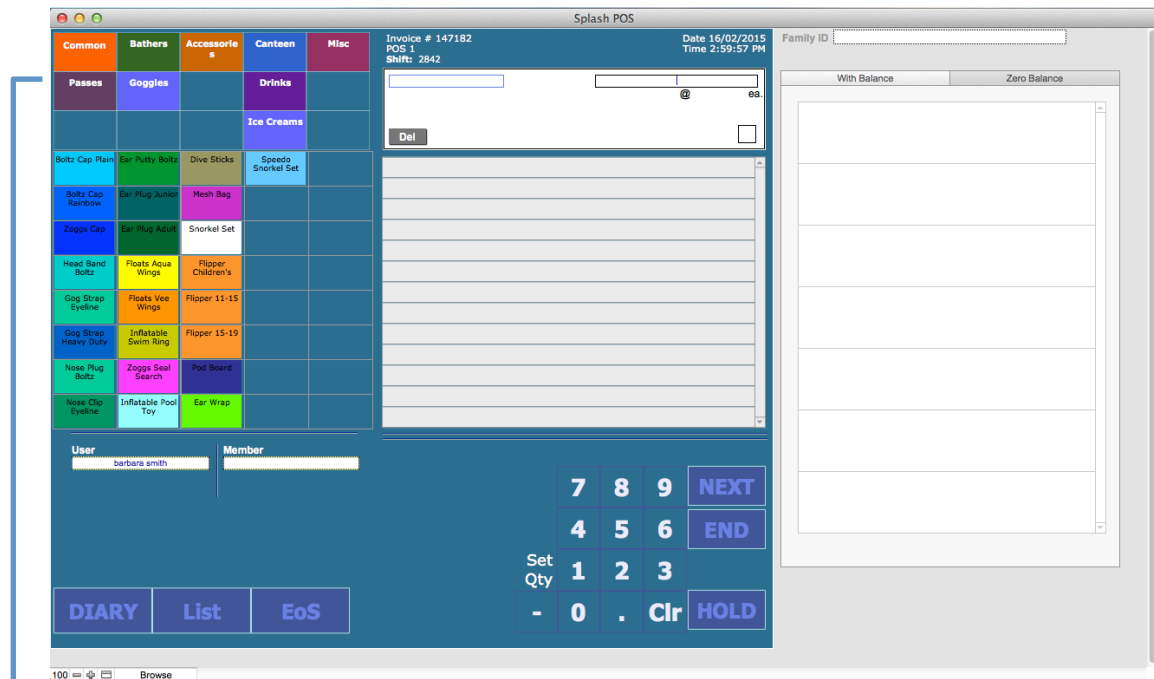
Processing a Sale

Entering a Quick Sale for Products

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the diary window.



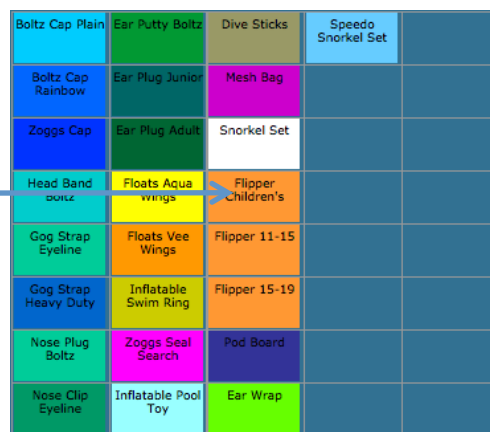
3. The POS interface will be displayed on your screen.



4. Select the Product Category which contains the button for the item being sold.



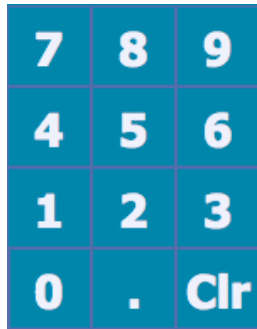
5. Click once on the product you wish to include in your sale.



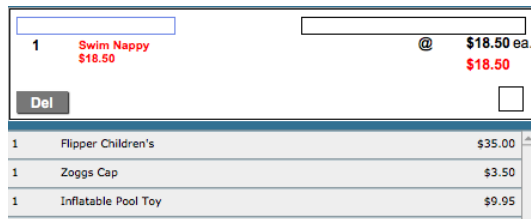
6. The item you have selected will move across to the top of the Sale Item box



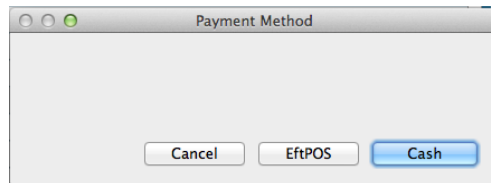
7. If you are selling multiple items of the same product click the **Clr** button, then select the actual quantity being sold.



8. Repeat steps 4 through 7 until all products have been define for the sale.
9. As you enter additional items they will move down the sale items area of the screen.



10. When all items have been defined, click the **END** button.
11. You will be asked to define the payment method for the selected sale. Choose EftPOS or Cash to complete the sale and return to the POS screen, or click Cancel to return to the sale without processing the payment.



Entering a Quick Sale for a Booking

Clicking the green dollar symbol displayed within the booking line triggers a quick sale for the selected booking. After selecting the dollar sign a sale will be created, the family will be selected and the selected booking information will be added to the sale.

1. Ensure the Diary is displayed on your screen.
2. Click the \$ displayed in the row for the booking you wish to pay.

The screenshot shows the 'Swim School Diary' interface. On the left, there's a filter section and a table of bookings. The right side shows the details for a selected booking: 'Dolphins @ 9:30 AM on Sunday with Barbara Smith'. A blue arrow points from the green dollar sign icon in the booking list to the details panel.

3. The POS interface will be displayed on your screen.
4. The selected booking will be moved to the sale item portal and all bookings for the selected family will be displayed in the panel on the right of the screen.

The screenshot shows the 'Splash POS' interface. The left panel is a menu with categories like Common, Bathers, Accessories, Canteen, and Misc. The right panel shows the 'SMITH (Barbara Smith)' family's sale items, including 'Lucas Smith - Dolphins - 9:30 AM Sun (Term 3 2014)' and 'Jacob Smith - Turtles - 10:00 AM Wed (Term 3 2014)'. The bottom panel shows a numeric keypad and buttons for 'DIARY', 'List', 'EoS', 'NEXT', and 'END'.

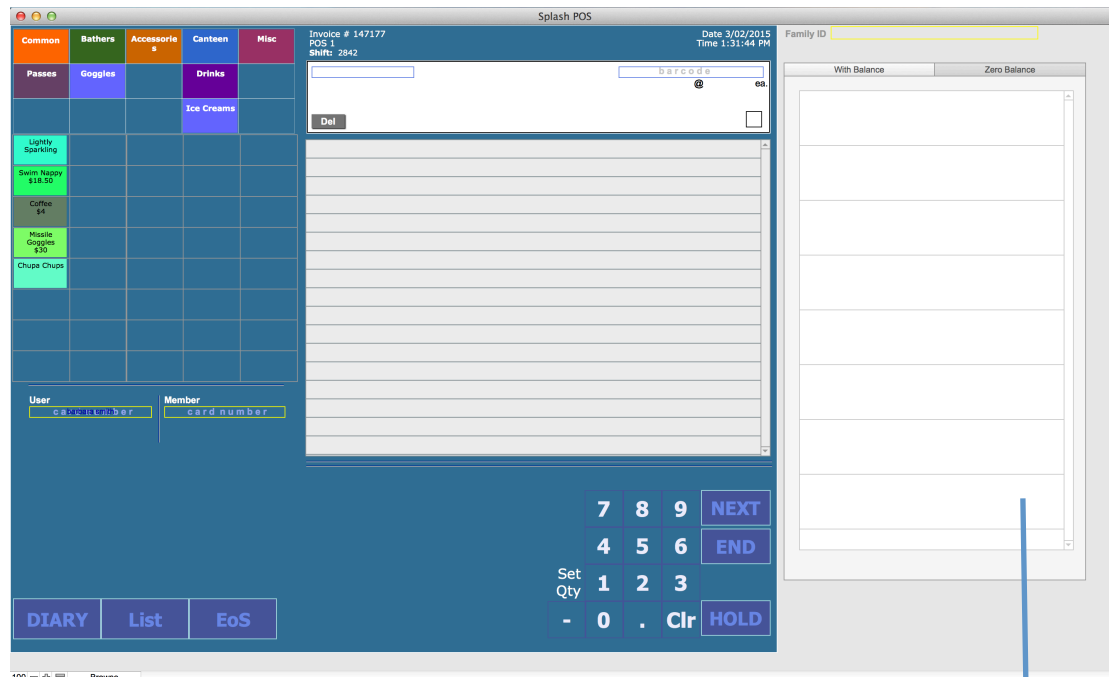
5. Select additional bookings or amend the payment amount of the existing item.
6. When all items for the sale have been selected, click the END or NEXT button to complete the sale.

END

Entering a Sale for a Combination of Bookings and Products

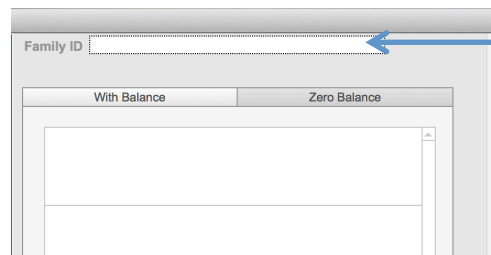
12.Ensure the Diary is displayed on your screen.

13.Click the \$ button displayed on the top right of the window.

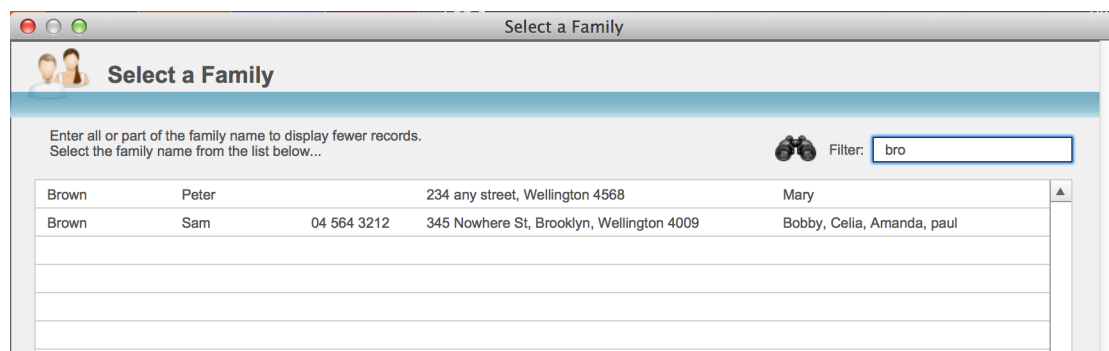


14.The POS interface will be displayed on your screen.

15.Click once within the Family ID field on the right of the screen.

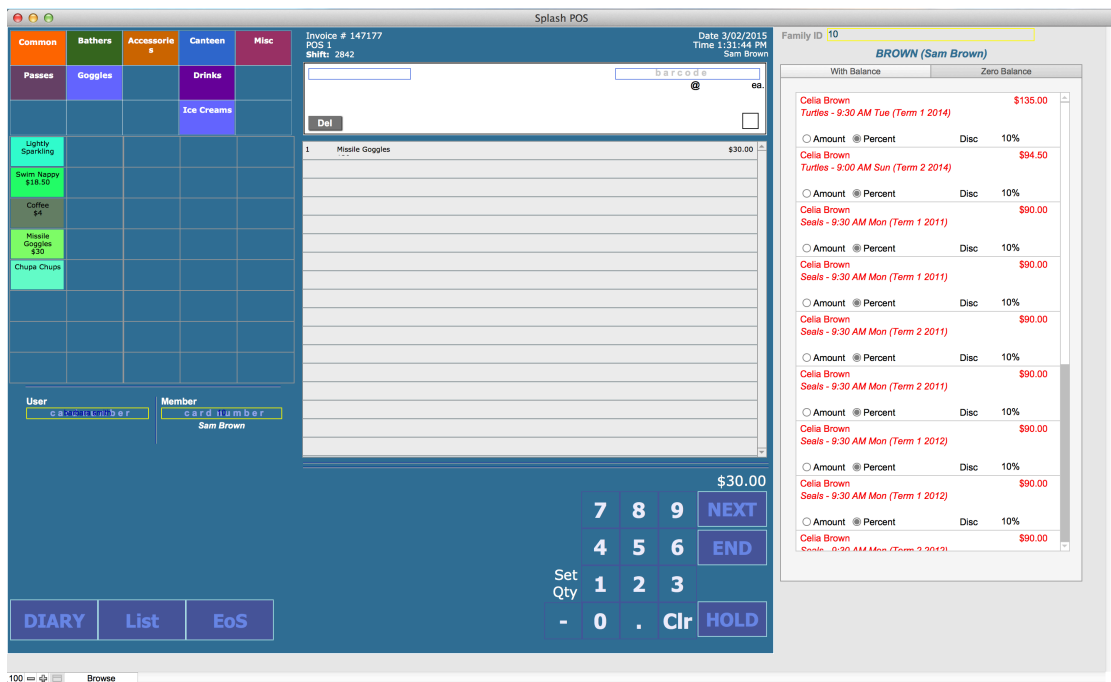


16.The Select a Family dialog will be displayed on your screen. Begin typing the family name (or part thereof) in the filter field. The content of the list will be revised as you type.

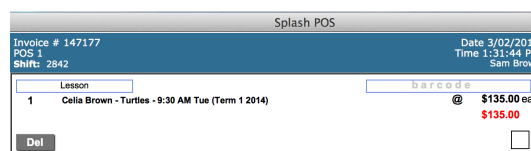


17.When you have identified the correct family simply click anywhere within the required row.

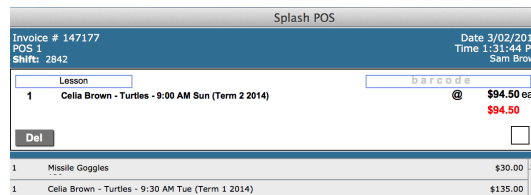
18.You will be returned to the POS screen, all existing bookings for the selected family will be displayed in the panel on the right of the screen.



19. Click once on the booking you wish to enter a payment for. The booking details will be copied to the sale item area of the screen.



20. Repeat step 9 until all bookings have been defined for the sale.



21. You are now ready to add products to your sale. Select the Product Category which contains the button for the item being sold.



22. Click once on the product you wish to include in your sale.



23. The item you have selected will move across to the top of the Sale Item box

1	Flipper Children's	@	\$35.00 ea.
			\$35.00
<input type="button" value="Del"/>		<input type="checkbox"/>	

24. Repeat steps 10 through 12 until all products have been defined for the sale.

25. When all items have been selected, click the END button.

26. You will be asked to define the payment method for the selected sale. Choose EftPOS or Cash to complete the sale and return to the POS screen or click Cancel to return to the sale without processing the payment.



Defining Alternative Payment Methods

10. Ensure the Diary is displayed on your screen.

11. Click the \$ button displayed on the top right of the window.



12. The POS interface will be displayed on your screen.

13. Click once in the Family ID field on the right of the screen.

14. The Select a Family dialog will be displayed on your screen. Enter the family name (or part thereof) in the filter field. The content of the list will be revised as you type.

Family Name	Individuals	Address
Brown Peter	234 any street, Wellington 4568	Mary
Brown Sam	04 564 3212 345 Nowhere St, Brooklyn, Wellington 4009	Bobby, Celia, Amanda, paul

15. When you have identified the correct family simply click anywhere within the required row.

16. You will be returned to the POS screen, all existing bookings for the selected family will be displayed in the panel on the right of the screen. This area is displayed in two cards ; with balance and zero balance.

Splash POS

Invoice # 147177
POS 1
Shift: 2842

Date: 3/02/2015
Time: 1:31:44 PM
Sam Brown

Family ID: 10
BROWN (Sam Brown)

With Balance Zero Balance

Amount	Percent	Disc	10%
Celia Brown			
Turtles - 9:30 AM Tue (Term 1 2014)			\$135.00
Celia Brown			
Turtles - 9:00 AM Sun (Term 2 2014)			\$94.50
Celia Brown			
Seals - 9:30 AM Mon (Term 1 2011)			\$90.00
Celia Brown			
Seals - 9:30 AM Mon (Term 2 2011)			\$90.00
Celia Brown			
Seals - 9:30 AM Mon (Term 1 2012)			\$90.00
Celia Brown			
Seals - 9:30 AM Mon (Term 2 2012)			\$90.00
Celia Brown			
Seals - 9:30 AM Mon (Term 1 2013)			\$90.00
Celia Brown			
Seals - 9:30 AM Mon (Term 2 2013)			\$90.00

1 Missile Goggles \$30.00

Set Qty: 7 8 9
4 5 6
1 2 3
- 0 . Clr

\$30.00

NEXT **END** **HOLD**

DIARY **List** **EoS**

17. Select any bookings and products that need to be included in the sale.

18. Repeat step 8 until all items have been defined for the sale.

15. When all bookings and products have been defined for the sale, click the **Next** button to define each method of payment.



16. The End Sale screen will be displayed.

Splash POS

Invoice # 147177
POS 1
Shift: 2842

Date: 3/02/2015
Time: 1:31:44 PM
Sam Brown

Payment Method Amount

DEL CreditCard 2842 259.5

DEL

Total: **\$259.50**

Change: **\$0.00**

CASH	EFTPOS	CREDIT CARD
GIFT VOUCHER	CHEQUE	AMEX
INTERNET	MANAGEMENT	PROMO
DIRECT DEBIT	SESSION PASS	JOURNAL

1 Missile Goggles \$30.00

1 Celia Brown - Turtles - 9:30 AM Tue (Term 1 2014) \$135.00

1 Celia Brown - Turtles - 9:00 AM Sun (Term 2 2014) \$94.50

Total: **\$259.50**

\$5 **\$10** **\$20** **\$50** 7 8 9
4 5 6
1 2 3
0 . Clr

BACK **END** **Clr**

DIARY **List** **EoS**

17. Choose the payment method by clicking the appropriate payment buttons on the left of your screen.

CASH	EFTPOS	CREDIT CARD
GIFT VOUCHER	CHEQUE	AMEX
INTERNET	MANAGEMENT	PROMO
DIRECT DEBIT	SESSION PASS	JOURNAL

18. Payments may be split across multiple methods. Simply select the required method of payment and update the amount being paid for each method.

DEL	CreditCard	2842	\$200.00
DEL	Cash	2842	59.5
DEL			

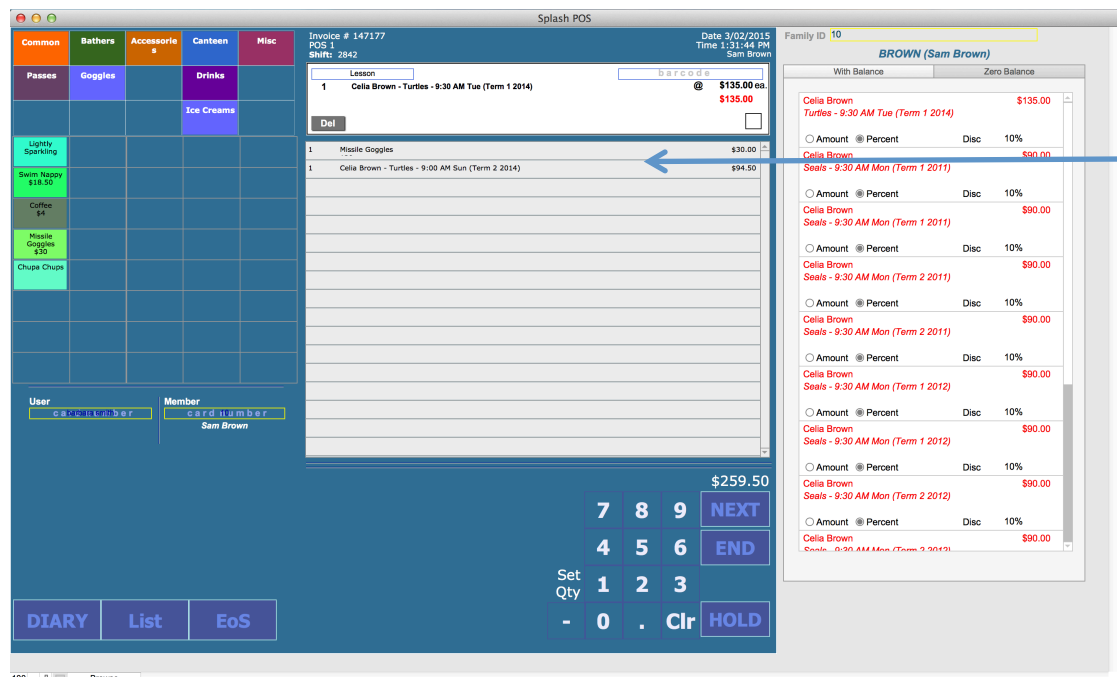
19. To complete the sale, click the **End** button.



Removing an Item from the Sale

An item may be deleted from the sale at any time before the transaction has been finalised. A transaction is considered finalised when you have successfully ended a transaction. In order to remove an item from the transaction it must be displayed at the top of the sale item list.

If the item you wish to remove is not displayed at the top of the list, simply click on the item to return it to the top.



5. Ensure the item you wish to remove is displayed in the sale item area at the top of the screen.
6. If the item is not displayed at the top of the list, simply click the required item and it will move to the top of the list.
7. Click the **Del** button
8. Complete your sale by clicking the End or Next button.

Applying a Discount to a Sale Item



11. Ensure the Diary is displayed on your screen.
12. Click the \$ button displayed on the top right of the screen.
13. The POS interface will be displayed on your screen.
14. Select the product/s you wish to sell.
15. A discount can be applied to a product while it is displayed at the top of the sale item list.
16. Click the Discount box at the right of the sale item screen to display the Staff Discount screen.

1 Missile Goggles \$30
Del

barcode @ \$30.00 ea.
\$30.00

Tuesday, 3 February 2015 3:22pm User

Invoice Number: 147177

STAFF DISCOUNT

STAFF DISCOUNT
VIP
MANAGEMENT
\$1 OFF

POS 1

Item Name
Missile Goggles

Quantity
1

Item Price/Payment Amount
\$30.00

Admend Price
\$25.50

Amount Applied (per item)
\$4.50

Cancel Commit

17. Either click an existing discount button or enter the amended price on the right of the screen.
18. Click Commit to return to your sale screen.
19. A cross will be displayed in the discount box when an item has been discounted.

1 Missile Goggles \$30
Del

barcode @ \$25.50 ea.
\$25.50

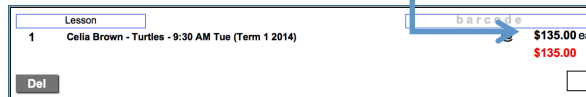
20. Complete your sale by clicking the **End** or **Next** button.

Applying a Part Payment to a Booking

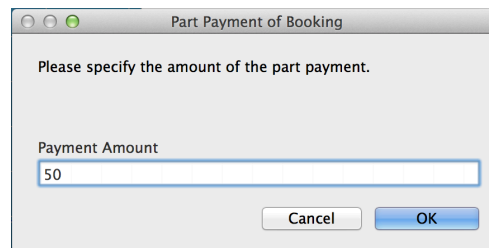
Part payments are only available for bookings. Products must be paid in full at the time the sale is made.



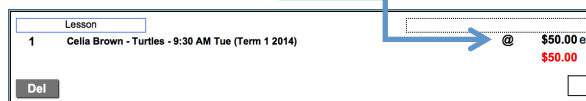
12. Ensure the Diary is displayed on your screen.
13. Click the \$ button displayed on the top right of the screen.
14. The POS interface will be displayed on your screen.
15. Select the booking you wish to process a payment for.
16. A part payment can only be defined while the booking appears in the sale item area at the top of the list.
17. Click the unit price written in black.



18. The Part Payment of Booking dialog will be displayed on your screen.
19. Enter the amount of the payment you would like to apply and click OK.



20. The sale item will show the booking with the revised unit price.



21. Repeat steps 4 through 9 until all relevant bookings have been selected and updated.
22. Complete your sale by clicking the **End** or **Next** button.

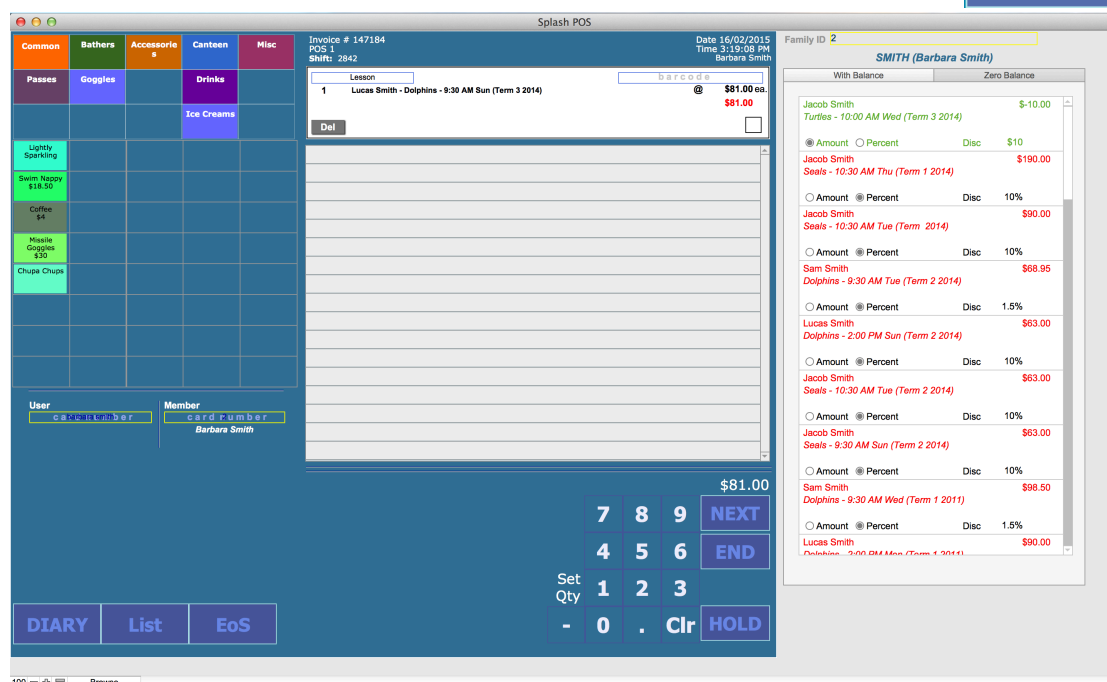
NB: The above command does not reduce the price of the initial booking; it simply applies a part payment to the outstanding balance.

Working with Held Sales

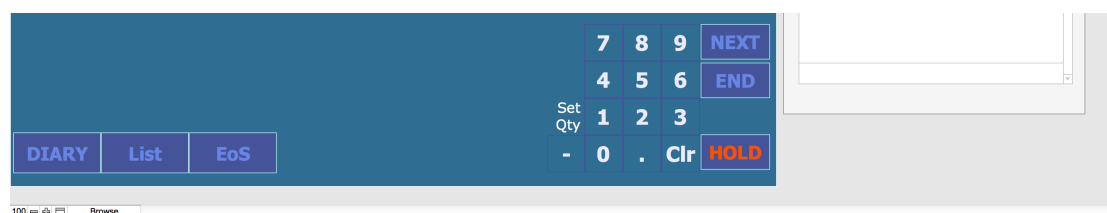
Placing a Sale on Hold

There may be instances where you are unable to complete the current transaction, however need to begin another. Placing a transaction on hold provides the ability to park the current transaction before it is finalised. You can then continue processing other transactions and simply recall the held transaction at a later time to complete it.

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the screen.
3. The POS interface will be displayed on your screen.
4. Select the bookings and products you wish to process a payment for.
5. Click the **HOLD** button.



6. The selected sale will disappear from your screen and the HOLD button will be highlighted to show there is a held sale.



7. You can now continue processing other sales.

Retrieving a Held Sale

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the screen.
3. The POS interface will be displayed on your screen, The hold button will be highlighted to indicate there is a held sale.
4. Display the held sale by clicking the **Hold** button.
5. The held sale will appear on your screen.



Splash POS

Invoice # 147184
POS 1
Shift: 2842

Date: 16/02/2015
Time: 3:19:08 PM
Barbara Smith

Family ID 2

SMITH (Barbara Smith)

Common	Bathers	Accessories	Canteen	Misc
Passes	Goggles		Drinks	
			Ice Creams	
Lightly Sparkling				
Swim Nappy \$18.50				
Coffee \$4				
Missile Goggles \$30				
Chupa Chups				

User: Member:

1 Lucas Smith - Dolphins - 9:30 AM Sun (Term 3 2014) \$81.00 ea. \$81.00

Del

7 8 9 NEXT
4 5 6 END
Set Qty 1 2 3
- 0 . Clr HOLD

\$81.00

DIARY List EoS

100 = Browse

With Balance	Zero Balance
Jacob Smith Turtles - 10:00 AM Wed (Term 3 2014)	\$-10.00
Amount Percent Disc	\$10
Jacob Smith Seals - 10:30 AM Thu (Term 1 2014)	\$190.00
Amount Percent Disc	10%
Jacob Smith Seals - 10:30 AM Tue (Term 2014)	\$90.00
Amount Percent Disc	10%
Sam Smith Dolphins - 9:30 AM Tue (Term 2 2014)	\$68.95
Amount Percent Disc	1.5%
Lucas Smith Dolphins - 2:00 PM Sun (Term 2 2014)	\$63.00
Amount Percent Disc	10%
Jacob Smith Seals - 10:30 AM Tue (Term 2 2014)	\$63.00
Amount Percent Disc	10%
Jacob Smith Seals - 9:30 AM Sun (Term 2 2014)	\$63.00
Amount Percent Disc	10%
Sam Smith Dolphins - 9:30 AM Wed (Term 1 2011)	\$98.50
Amount Percent Disc	1.5%
Lucas Smith Dolphins - 3:00 PM Mon (Term 1 2014)	\$90.00

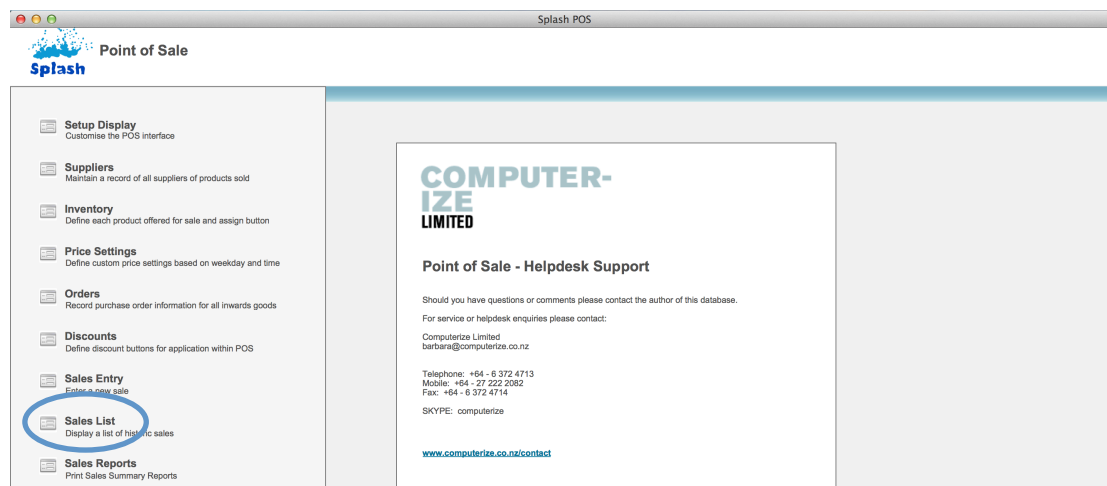
6. Complete the sale by clicking the END or NEXT button.

NB: The End of Shift cannot be processed while you have a held sale.

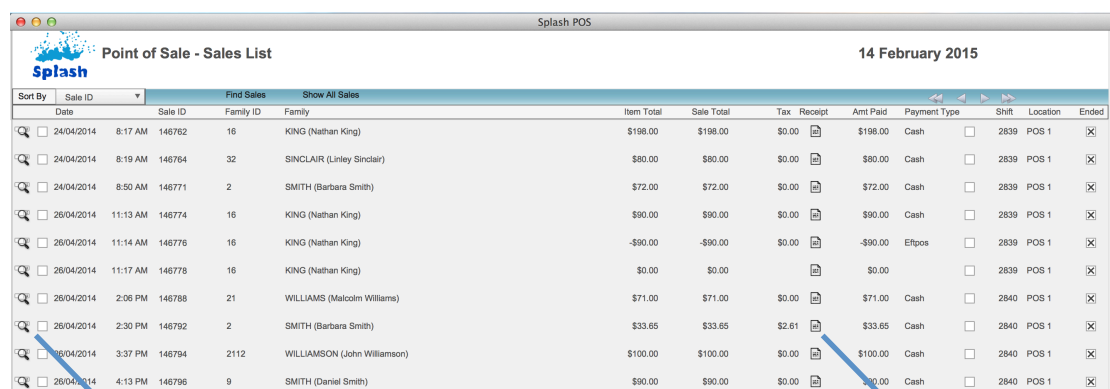
Viewing a List of Sales

Each record in your Sales module can be displayed as part of a list. List view displays all records in the found set.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon to the left of **Sales List** on the left of your screen.



3. A list of sales will be displayed on your screen.



Sort By	Sale ID	Find Sales	Show All Sales									
Date	Sale ID	Family ID	Family	Item Total	Sale Total	Tax	Receipt	Amt Paid	Payment Type	Shift	Location	Ended
24/04/2014 8:17 AM	146762	16	KING (Nathan King)	\$198.00	\$198.00	\$0.00		\$198.00	Cash	2839	POS 1	
24/04/2014 8:19 AM	146764	32	SINCLAIR (Linley Sinclair)	\$80.00	\$80.00	\$0.00		\$80.00	Cash	2839	POS 1	
24/04/2014 8:50 AM	146771	2	SMITH (Barbara Smith)	\$72.00	\$72.00	\$0.00		\$72.00	Cash	2839	POS 1	
26/04/2014 11:13 AM	146774	16	KING (Nathan King)	\$90.00	\$90.00	\$0.00		\$90.00	Cash	2839	POS 1	
26/04/2014 11:14 AM	146776	16	KING (Nathan King)	-\$90.00	-\$90.00	\$0.00		-\$90.00	Eftpos	2839	POS 1	
26/04/2014 11:17 AM	146778	16	KING (Nathan King)	\$0.00	\$0.00	\$0.00		\$0.00		2839	POS 1	
26/04/2014 2:06 PM	146788	21	WILLIAMS (Malcolm Williams)	\$71.00	\$71.00	\$0.00		\$71.00	Cash	2840	POS 1	
26/04/2014 2:30 PM	146792	2	SMITH (Barbara Smith)	\$33.65	\$33.65	\$2.61		\$33.65	Cash	2840	POS 1	
26/04/2014 3:37 PM	146794	2112	WILLIAMSON (John Williamson)	\$100.00	\$100.00	\$0.00		\$100.00	Cash	2840	POS 1	
26/04/2014 4:13 PM	146796	9	SMITH (Daniel Smith)	\$90.00	\$90.00	\$0.00		\$90.00	Cash	2840	POS 1	

View Receipt

Print Receipt

Finding a Transaction

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon to the left of **Sales List** on the left of your screen.
3. Click once on the **Find Sales** button displayed in the blue stripe at the top of your screen.

Splash POS

Splash

Point of Sale - Sales List

14 February 2015

Sort By

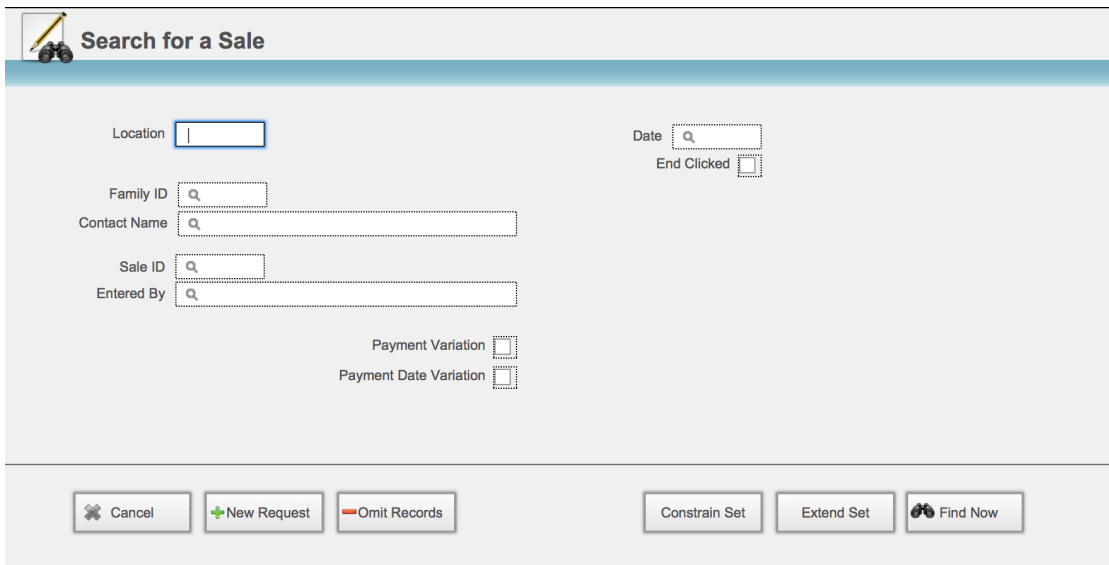
Sale ID

Find Sales

Show All Sales

Date	Sale ID	Family ID	Family	Item Total	Sale Total	Tax	Receipt	Amt Paid	Payment Type	Shift	Location	Ended		
<input type="checkbox"/>	24/04/2014	8:17 AM	146762	16	KING (Nathan King)	\$198.00	\$198.00	\$0.00		\$198.00	Cash	<input type="checkbox"/>	2839 POS 1	
<input type="checkbox"/>	24/04/2014	8:19 AM	146764	32	SINCLAIR (Linley Sinclair)	\$80.00	\$80.00	\$0.00		\$80.00	Cash	<input type="checkbox"/>	2839 POS 1	
<input type="checkbox"/>	24/04/2014	8:50 AM	146771	2	SMITH (Barbara Smith)	\$72.00	\$72.00	\$0.00		\$72.00	Cash	<input type="checkbox"/>	2839 POS 1	
<input type="checkbox"/>	26/04/2014	11:13 AM	146774	16	KING (Nathan King)	\$90.00	\$90.00	\$0.00		\$90.00	Cash	<input type="checkbox"/>	2839 POS 1	
<input type="checkbox"/>	26/04/2014	11:14 AM	146776	16	KING (Nathan King)	-\$90.00	-\$90.00	\$0.00		-\$90.00	Eltpos	<input type="checkbox"/>	2839 POS 1	
<input type="checkbox"/>	26/04/2014	11:17 AM	146778	16	KING (Nathan King)	\$0.00	\$0.00			\$0.00		<input type="checkbox"/>	2839 POS 1	
<input type="checkbox"/>	26/04/2014	2:06 PM	146788	21	WILLIAMS (Malcolm Williams)	\$71.00	\$71.00	\$0.00		\$71.00	Cash	<input type="checkbox"/>	2840 POS 1	
<input type="checkbox"/>	26/04/2014	2:30 PM	146792	2	SMITH (Barbara Smith)	\$33.65	\$33.65	\$2.61		\$33.65	Cash	<input type="checkbox"/>	2840 POS 1	
<input type="checkbox"/>	26/04/2014	3:37 PM	146794	2112	WILLIAMSON (John Williamson)	\$100.00	\$100.00	\$0.00		\$100.00	Cash	<input type="checkbox"/>	2840 POS 1	
<input type="checkbox"/>	26/04/2014	4:13 PM	146795	9	SMITH (Daniel Smith)	\$90.00	\$90.00	\$0.00		\$90.00	Cash	<input type="checkbox"/>	2840 POS 1	

4. The **Search for a Sale** dialog box will be displayed on your screen.



Search for a Sale

Location

Date

End Clicked ☐

Family ID

Contact Name

Sale ID

Entered By

Payment Variation ☐

Payment Date Variation ☐

Cancel

New Request

Omit Records

Constrain Set

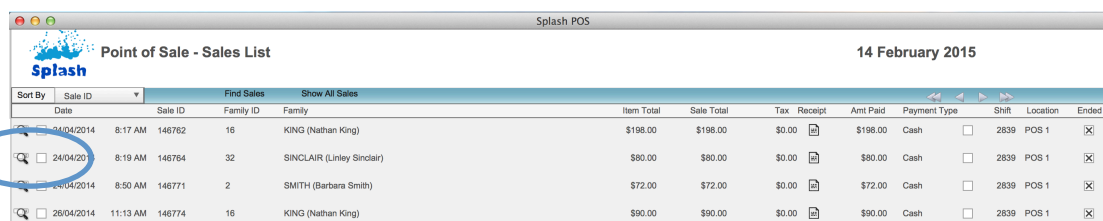
Extend Set

Find Now

5. Enter the criteria for your find in the appropriate fields.
 6. Click the **Find Now** button.
 7. The result of your find will be displayed in the list view.
- NB:** The New Request button can be used to define additional find criteria (e.g. Date = 10/4/05 **AND** Date = 3/4/05).

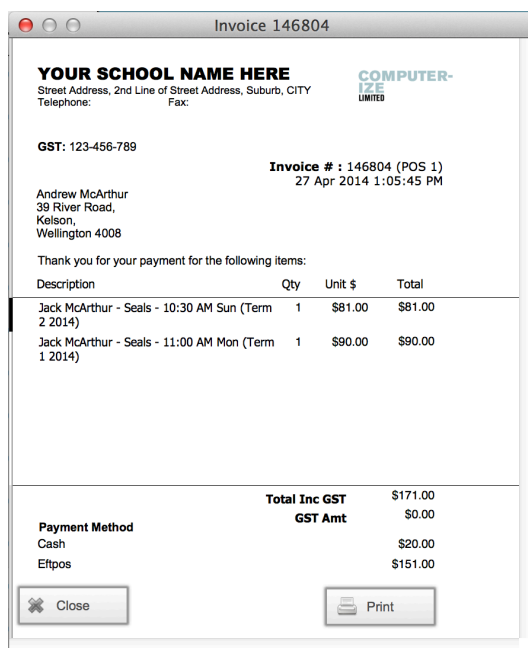
Viewing the Content of a Previous Sale

1. Use the **Finding a Transaction** function to locate the sale record you wish to view.



Sort By	Sale ID	Date	Sale ID	Family ID	Family	Item Total	Sale Total	Tax	Receipt	Amt Paid	Payment Type	Shift	Location	Ended
	24/04/2014	8:17 AM	146762	16	KING (Nathan King)	\$198.00	\$198.00	\$0.00		\$198.00	Cash	2839	POS 1	
	24/04/2014	8:19 AM	146764	32	SINCLAIR (Linley Sinclair)	\$80.00	\$80.00	\$0.00		\$80.00	Cash	2839	POS 1	
	24/04/2014	8:50 AM	146771	2	SMITH (Barbara Smith)	\$72.00	\$72.00	\$0.00		\$72.00	Cash	2839	POS 1	
	26/04/2014	11:13 AM	146774	16	KING (Nathan King)	\$90.00	\$90.00	\$0.00		\$90.00	Cash	2839	POS 1	

2. Click the magnifying glass to the left of the transaction you wish to view.



Invoice 146804

YOUR SCHOOL NAME HERE
 Street Address, 2nd Line of Street Address, Suburb, CITY
 Telephone: Fax:

COMPUTER-IZE LIMITED

GST: 123-456-789

Invoice # : 146804 (POS 1)
 27 Apr 2014 1:05:45 PM

Andrew McArthur
 39 River Road,
 Kelson,
 Wellington 4008

Thank you for your payment for the following items:

Description	Qty	Unit \$	Total
Jack McArthur - Seals - 10:30 AM Sun (Term 2 2014)	1	\$81.00	\$81.00
Jack McArthur - Seals - 11:00 AM Mon (Term 1 2014)	1	\$90.00	\$90.00

Total Inc GST \$171.00
GST Amt \$0.00

Payment Method
 Cash \$20.00
 Eftpos \$151.00

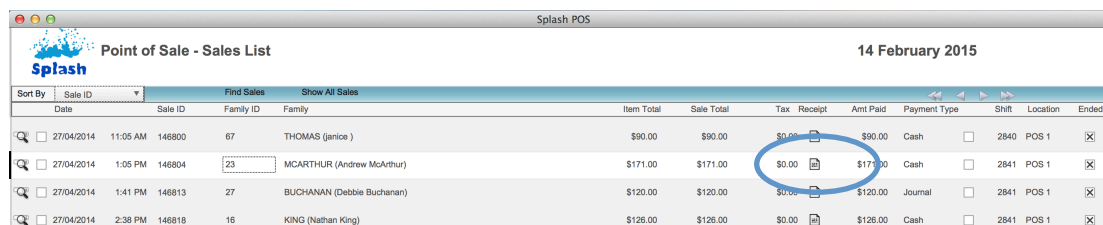
Close Print

3. The selected transaction will be displayed on your screen.
4. Click the Close button to close the dialog without printing, or click the Print button to print a copy of the receipt.

NB: Receipts may also be viewed and reprinted from the Accounts tab card in the family file.

Reprinting a Receipt

1. Use the **Finding a Transaction** function to locate the sale record you wish to reprint.



Sort By	Sale ID	Date	Sale ID	Family ID	Family	Item Total	Sale Total	Tax	Receipt	Amt Paid	Payment Type	Shift	Location	Ended
	27/04/2014	11:05 AM	146800	67	THOMAS (Janice)	\$90.00	\$90.00	\$0.00		\$90.00	Cash	2840	POS 1	
	27/04/2014	1:05 PM	146804	23	MCARTHUR (Andrew McArthur)	\$171.00	\$171.00	\$0.00		\$171.00	Cash	2841	POS 1	
	27/04/2014	1:41 PM	146813	27	BUCHANAN (Debbie Buchanan)	\$120.00	\$120.00	\$0.00		\$120.00	Journal	2841	POS 1	
	27/04/2014	2:38 PM	146818	16	KING (Nathan King)	\$126.00	\$126.00	\$0.00		\$126.00	Cash	2841	POS 1	

2. Click the receipt button to the right of the invoice total for the required transaction.

TEST SWIM SCHOOL

Street Address, 2nd Line of Street Address,
Suburb, CITY
Telephone: Fax:

GST: 123-456-789

Sun, 27 Apr 2014 1:05:45 PM

TAX INVOICE 146804

Qty	Description	Total
1	Jack McArthur - Seals -	\$81.00
	@	\$81.00
1	Jack McArthur - Seals -	\$90.00
	@	\$90.00
CASH		\$20.00
EFTPOS		\$151.00
Total Inc GST		\$171.00
GST Amt		\$0.00
Change		\$0.00

NB: Receipts may also be viewed and reprinted from the Accounts tab card in the family file.

Changing Receipt Paper Size

The default format for your receipts can be defined as either A5 or 80mm (standard eftpos receipt). Define the format you require by selecting it within the System Defaults.

The screenshot shows the 'System Defaults' window in the Splash software. The 'Default Paper Size' is set to 'A4'. The 'Confirmation and Reminders' section has 'Receipts' set to 'A5' and 'Custom' (circled in blue). The 'Automatically Print Receipt' dropdown is set to 'Never'. The 'Automatically Print Confirmation' and 'Automatically Email Confirmation' are both set to 'Yes'. The 'Automatically Email Reminder Notice' is set to 'Yes'. The 'Email Method' is set to 'Never'. The 'Computerize Limited' logo and 'Helpdesk Support' information are visible on the right side of the window.

NB: Set at Custom for 80mm.

Deleting a Transaction

Splash POS Payment records cannot be deleted. If you have processed a payment in error, you should reverse the payment rather than attempt to delete it.

Reversing a Transaction

A reversal is created by creating an identical transaction, however, enter either the amount or the quantity as a negative rather than a positive value.

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the window.
3. Define the amount of the payment to be reversed by selecting the appropriate products or bookings.
4. If you are returning items to stock, create the reversal by selecting the stock item and entering a negative number in the **Qty** field.
5. If you are not returning items to stock but wish to credit an amount for either a product or a booking simply enter the value of the item as a negative value.
6. To complete the sale, click the **Sale** or **Next** button.



NB: Make sure you select the correct payment method – if you are giving cash back to the client select cash as the payment type.

Printing Point of Sale Reports

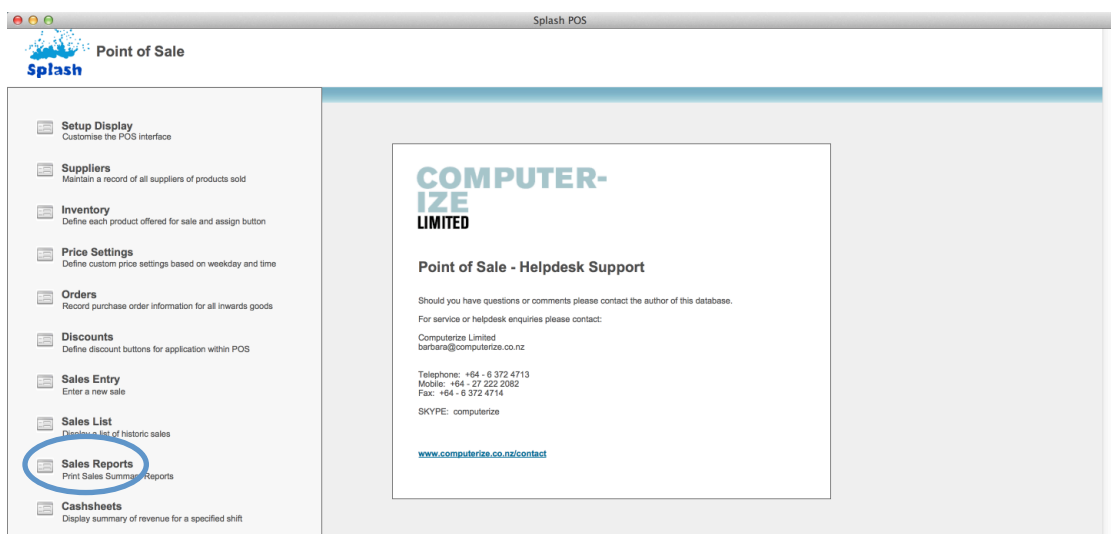
Access to this area of the database is restricted to those with POS setup access. Use this area of the POS system to generate reports which contain summaries of either products sold or monies received.

All reports follow the same four step process.

1. Locate the Data for Reporting
2. Choose Report Format
3. Enter Report Title
4. Produce Report

Generating a Report

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the words **Sales Reports** on the left of your screen.

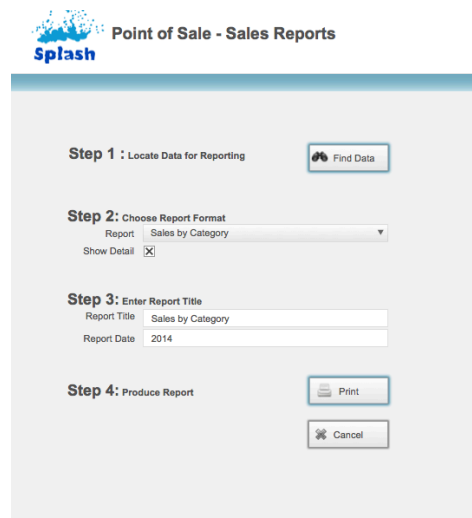


3. The Point of Sale – Sales Reports Screen will be displayed.

1. Locating Report Data

Step one involved locating the data you wish to include in your report. This function operates the same way as all other find commands in Splash.

4. Click the Find Data button to display the Sale Reports Find Screen



5. Enter the search criteria for the data you wish to include in your report (remember you can enter a date range ... symbols, or specify an entire month by entering only the month and year in the following format mm/yyyy)

6. Click the Find button to complete the find.

2. Choose Report Format

After completing the find you will be returned to the Sales Reports dialog where you now need to select the type of report you wish to generate.

7. Select the Report Type from the drop-down menu supplied at step 2.

8. Define whether you wish to show detail in your report. When clicked **Show Detail** will ensure each individual transaction is displayed along with totals rather than a summary totals for the found items.

3. Enter Report Title

9. Enter the Title you wish to appear on the top of the report.
10. Enter a report date to appear on the report (optional).

The screenshot shows the 'Point of Sale - Sales Reports' window with the following steps:

- Step 1: Locate Data for Reporting** - Includes a 'Find Data' button.
- Step 2: Choose Report Format** - Includes a 'Report' dropdown menu set to 'Sales by Category' and a 'Show Detail' checkbox.
- Step 3: Enter Report Title** - Includes a 'Report Title' text field set to 'Sales by Category' and a 'Report Date' text field set to 'May 2014'.
- Step 4: Produce Report** - Includes 'Print' and 'Cancel' buttons.

11. Click the **Print** button.

12. The report will be displayed on your screen, click the Continue button or press ENTER to display the print dialog.

The screenshot shows the 'Summary by Payment Type - YTD 2015' report. The table has the following columns: POS 1, Account, Cash, Cheque, CreditCard, Eftpos, Internet, Mgment, Promo, Voucher, and Other. The data is as follows:

POS 1	Account	Cash	Cheque	CreditCard	Eftpos	Internet	Mgment	Promo	Voucher	Other
	\$0.00	\$36.95	\$0.00	\$0.00	\$81.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3/02/2015	\$0.00	-\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
16/02/2015	\$0.00	\$66.95	\$0.00	\$0.00	\$81.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

13. The print dialog will be displayed on your screen. The appearance of the dialog will differ for each printer type. Ensure Records Being Browsed is selected in the dialog before choosing to print.

The screenshot shows the 'Print' dialog box with the following settings:

- Printer: Brother HL-4570CDW series
- Presets: Default Settings
- Copies: 1
- Pages: All
- FileMaker Pro
- Number pages from: 1
- Print: ☒ Records being browsed
- Blank record, showing fields: as formatted

14. Click the Print button to produce the report, or Cancel to return to the Sales Report screen without printing.

Sample Reports

Individual Sales by Payment Type

This report displays a list of all transactions for a specified date along with totals for each method of payment. When selecting this report type you will be asked to define the date for reporting.

Without Detail

Summary by Payment Type - May 2014										
	Account	Cash	Cheque	CreditCard	Eftpos	Internet	Mgment	Promo	Voucher	Other
POS 1	\$0.00	\$1728.70	\$0.00	\$283.50	\$988.10	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00
1/05/2014	\$0.00	\$204.50	\$0.00	\$0.00	\$243.00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00
2/05/2014	\$0.00	\$301.00	\$0.00	\$0.00	\$97.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3/05/2014	\$0.00	\$1223.20	\$0.00	\$283.50	\$647.60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Totals	\$0.00	\$1728.70	\$0.00	\$283.50	\$988.10	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00

With Detail

Summary by Payment Type - YTD 2015										
	Account	Cash	Cheque	CreditCard	Eftpos	Internet	Mgment	Promo	Voucher	Other
POS 1	\$0.00	\$1728.70	\$0.00	\$283.50	\$988.10	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00
1/05/2014	\$0.00	\$204.50	\$0.00	\$0.00	\$243.00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00
14688 Martha Taylor	\$0.00	\$108.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14688 David Jones	\$0.00	\$6.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14688 Linley Sinclair	\$0.00	\$0.00	\$0.00	\$0.00	\$243.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14689 Andy zimmerman	\$0.00	\$54.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14689 Debbie Buchanan	\$0.00	\$36.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14690 Cash Sale	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00
2/05/2014	\$0.00	\$301.00	\$0.00	\$0.00	\$97.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14689 Anthony Thomson	\$0.00	\$189.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14689 Barbara Smith	\$0.00	\$0.00	\$0.00	\$0.00	\$97.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14690 Cash Sale	\$0.00	\$4.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14690 Daniel	\$0.00	\$108.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3/05/2014	\$0.00	\$1223.20	\$0.00	\$283.50	\$647.60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14691 Patricia O'Donnell	\$0.00	\$108.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14691 Nicola Robinson	\$0.00	\$345.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14691 Cash Sale	\$0.00	\$18.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14691 Barbara Smith	\$0.00	-\$1.00	\$0.00	\$0.00	\$188.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14691 Anthony Thomson	\$0.00	\$475.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14692 David Anderson	\$0.00	\$0.00	\$0.00	\$283.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14692 Cash Sale	\$0.00	\$19.20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Pg. Printed at 13024 on Wednesday, 18 February 2015

Summary of Transactions

This report displays a list of all sale items grouped by date of payment.

Without Detail

Summary of Transactions				
		Payments Received	Items Paid For	Invoice Total
01 May 2014				
POS 1		\$447.50	\$447.50	\$447.50
Transaction Balanced		\$447.50	\$447.50	\$447.50
Cashsheet Total		\$447.50	\$447.50	\$447.50

With Detail

Summary of Transactions				
		Payments Received	Items Paid For	Invoice Total
01 May 2014				
POS 1		\$447.50	\$447.50	\$447.50
Transaction Balanced		\$447.50	\$447.50	\$447.50
1/5/2014 11:15 AM	146880	Martha Taylor	\$108.00	\$108.00
1/5/2014 11:15 AM	146881	Cash Sale	\$0.00	\$0.00
1/5/2014 11:25 AM	146882	Andrew McArthur	\$0.00	\$0.00
1/5/2014 11:26 AM	146883	David Jones	\$6.50	\$6.50
1/5/2014 11:26 AM	146884	Cash Sale	\$0.00	\$0.00
1/5/2014 11:27 AM	146885	Cash Sale	\$0.00	\$0.00
1/5/2014 12:40 PM	146886	Cash Sale	\$0.00	\$0.00
1/5/2014 5:03 PM	146887	Martha Apollo	\$0.00	\$0.00
1/5/2014 5:03 PM	146888	Linley Sinclair	\$243.00	\$243.00
1/5/2014 5:56 PM	146889	Cash Sale	\$0.00	\$0.00
1/5/2014 6:43 PM	146890	Andy zimmerman	\$54.00	\$54.00
1/5/2014 6:40 PM	146891	Debbie Buchanan	\$36.00	\$36.00
1/5/2014 6:40 PM	146892	Cash Sale	\$0.00	\$0.00
1/5/2014 6:42 PM	146893	Cash Sale	\$0.00	\$0.00
1/5/2014 6:42 PM	146894	Cash Sale	\$0.00	\$0.00
1/5/2014 6:43 PM	146895	Cash Sale	\$0.00	\$0.00
1/5/2014 8:54 PM	146896	Cash Sale	\$0.00	\$0.00
Cashsheet Total		\$447.50	\$447.50	\$447.50

Individual Sales by Payment Type

This report displays a list of all transactions for a specified date along with totals for each method of payment. When selecting this report type you will be asked to define the date for reporting.

Without Detail

Individual Sales by Payment Type	
Thursday, 01 May 2014	\$477.50
CASH	\$204.50
EFTPOS	\$243.00
INTERNET	\$30.00

With Detail

Individual Sales by Payment Type			
Thursday, 01 May 2014			\$477.50
CASH			\$204.50
11:15 AM	146880	Martha Taylor	\$108.00
11:26 AM	146883	David Jones	\$6.50
6:43 PM	146890	Andy zimmerman	\$54.00
6:40 PM	146891	Debbie Buchanan	\$36.00
EFTPOS			\$243.00
5:03 PM	146888	Linley Sinclair	\$243.00
INTERNET			\$30.00
5:51 PM	146908	Cash Sale	\$30.00

Totals by Day

This report displays the total sales grouped by date of payment.

Without Detail

Totals By Day			
	QTY	TOTAL INC	TOTAL GST
Pos 1		\$3,050.30	\$41.49
Thursday, 01 May 2014		\$477.50	\$3.91
Friday, 02 May 2014		\$398.50	\$4.43
Saturday, 03 May 2014		\$2,174.30	\$33.15
Total Included in Report		\$3,050.30	\$41.49

With Detail

Totals By Day				
	QTY	TOTAL INC	TOTAL GST	TOTAL EX
Pos 1		\$3,050.30	\$41.49	\$3,008.81
Thursday, 01 May 2014		\$477.50	\$3.91	\$473.59
Lesson	11	\$447.50		\$447.50
Missile Goggles	1	\$30.00	\$3.91	\$26.09
Friday, 02 May 2014		\$398.50	\$4.43	\$394.07
Boys Bathers	1			
Lap Pass	1			
Lap Swim	2	\$4.00	\$0.52	\$3.48
Lesson	5	\$364.50		\$364.50
Missile Goggles	1	\$30.00	\$3.91	\$26.09
Saturday, 03 May 2014		\$2,174.30	\$33.15	\$2,141.15
Aqua Senior	1			
Coffee	1	\$4.00	\$0.52	\$3.48
Freddo Frog	1	\$0.60	\$0.08	\$0.52
Lap Swim	1	\$4.00	\$0.52	\$3.48
Lesson	25	\$1,920.00		\$1,920.00
Missile Goggles	5	\$149.00	\$19.42	\$129.58
Strobe	1	\$15.20	\$1.98	\$13.22
Swim Nappy	1	\$18.50	\$2.41	\$16.09
Vorgee Jnr	3	\$63.00	\$8.22	\$54.78
Total Included in Report		\$3,050.30	\$41.49	\$3,008.81

Totals by Week

This report displays the total sales grouped by date of payment.

Without Detail

Totals By Week				
	QTY	TOTAL INC	TOTAL GST	TOTAL Ex
Pos 1		\$11,356.65	\$123.45	\$11,233.20
Week 9		\$312.78		\$312.78
Week 12		\$1,040.60	\$0.86	\$1,039.74
Week 13		\$135.00		\$135.00
Week 14		\$180.00		\$180.00
Week 16		\$17.80	\$2.34	\$15.46
Week 17		\$835.15	\$30.74	\$804.41
Week 18		\$6,428.80	\$67.24	\$6,361.56
Week 24		\$294.15	\$16.31	\$277.84
Week 26		\$45.67	\$5.96	\$39.71
Week 27		\$82.00		\$82.00
Week 42		\$202.00		\$202.00
Week 43		\$140.00		\$140.00
Week 44		\$1,642.70		\$1,642.70
Total Included in Report		\$11,356.65	\$123.45	\$11,233.20

With Detail

Totals By Week					
		QTY	TOTAL INC	TOTAL GST	TOTAL EX
Pos 1			\$11,356.65	\$123.45	\$11,233.20
Week 9			\$312.78		\$312.78
	Lap Swim	1			
	Lesson	4	\$312.78		\$312.78
Week 12			\$1,040.60	\$0.86	\$1,039.74
	Gaytime	1	\$3.00	\$0.39	\$2.61
	Girls Bathers	3			
	Lesson	13	\$1,034.00		\$1,034.00
	Magnum	1	\$3.60	\$0.47	\$3.13
Week 13			\$135.00		\$135.00
	450ml Coke Product	1			
	Lesson	3	\$135.00		\$135.00
Week 14			\$180.00		\$180.00
	Lesson	2	\$180.00		\$180.00
Week 16			\$17.80	\$2.34	\$15.46
	-	2			
	Nestea	4	\$14.00	\$1.84	\$12.16
	Powerade	1	\$3.80	\$0.50	\$3.30
Week 17			\$835.15	\$30.74	\$804.41
	10 Session Pass	1	\$165.25	\$21.55	\$143.70
	Fruit Box	1	\$2.50	\$0.33	\$2.17
	Funky Trunks	2	\$40.00	\$5.22	\$34.78
	Lap Swim	1	\$4.00	\$0.52	\$3.48
	Lesson	20	\$599.50		\$599.50
	Nestea	1	\$3.50	\$0.46	\$3.04
	Pop Top	1	\$1.90	\$0.25	\$1.65
	Swim Nappy	1	\$18.50	\$2.41	\$16.09
Week 18			\$6,428.80	\$67.24	\$6,361.56

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Page 1

Totals by Month

This report displays the total sales grouped by date of payment.

Without Detail

Totals By Month				
	Qty	TOTAL INC	TOTAL GST	TOTAL EX
Pos 1		\$11,356.65	\$123.45	\$11,233.20
March		\$1,488.38	\$0.86	\$1,487.52
April		\$4,411.45	\$58.83	\$4,352.62
May		\$3,050.30	\$41.49	\$3,008.81
June		\$339.82	\$22.27	\$317.55
July		\$82.00		\$82.00
October		\$1,984.70		\$1,984.70
Total Included in Report		\$11,356.65	\$123.45	\$11,233.20

With Detail

Totals By Month					
		QTY	TOTAL INC	TOTAL GST	TOTAL EX
Pos 1			\$11,356.65	\$123.45	\$11,233.20
March			\$1,488.38	\$0.86	\$1,487.52
	450ml Coke Product	1			
	Gaytime	1	\$3.00	\$0.39	\$2.61
	Girls Bathers	3			
	Lap Swim	1			
	Lesson	20	\$1,481.78		\$1,481.78
	Magnum	1	\$3.60	\$0.47	\$3.13
April			\$4,411.45	\$58.83	\$4,352.62
	-	2			
	10 Session Pass	1	\$165.25	\$21.55	\$143.70
	Chupa Chups	5	\$3.00	\$0.39	\$2.61
	Coffee	1	\$4.00	\$0.52	\$3.48
	Fruit Box	1	\$2.50	\$0.33	\$2.17
	Funky Trunks	2	\$40.00	\$5.22	\$34.78
	Girls Bathers	1			
	killer python	1	\$1.00	\$0.13	\$0.87
	Lap Swim	1	\$4.00	\$0.52	\$3.48
	Lesson	64	\$3,960.50		\$3,960.50
	Meteor	1	\$18.95	\$2.47	\$16.48
	Missile Goggles	3	\$90.00	\$11.73	\$78.27
	Nestea	5	\$17.50	\$2.30	\$15.20
	Pop Top	1	\$1.90	\$0.25	\$1.65
	Powerade	1	\$3.80	\$0.50	\$3.30
	Small Snake	1	\$0.10	\$0.01	\$0.09
	Sunday Mail	1	\$2.50	\$0.33	\$2.17
	Super Stream	1	\$12.95	\$1.69	\$11.26
	Swim Nappy	1	\$18.50	\$2.41	\$16.09
	Vorgee Jnr	3	\$63.00	\$8.22	\$54.78

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Page 1

Totals by Year

This report displays the total sales grouped by date of payment.

Without Detail

Totals By Year			
	Qty	TOTAL INC	TOTAL GST
Pos 1			TOTAL EX
2013		\$11,674.60	\$135.52
2014		\$11,356.65	\$123.45
2015		\$317.95	\$12.07
Total Included in Report		\$11,674.60	\$135.52
			\$11,539.08

With Detail

Totals By Year			
	Qty	TOTAL INC	TOTAL GST
Pos 1			TOTAL EX
2013		\$11,674.60	\$135.52
2014		\$11,356.65	\$123.45
2015		\$317.95	\$12.07
Total Included in Report		\$11,674.60	\$135.52
			\$11,539.08

2013				
	Aqua Senior	1		
2014			\$11,356.65	\$123.45
	-	9		
	10 Session Pass	1	\$165.25	\$21.55
	450ml Coke Product	1		\$143.70
	Anthony Apollo - Dolphins - 1:30 PM Wed (Term 3	3	\$27.00	\$27.00
	Anthony Apollo - Dolphins - 9:30 AM Sun (Term 2	2	\$18.00	\$18.00
	Aqua Senior	1		
	Aurora	2	\$30.40	\$3.96
	Barry Robinson - Dolphins - 2:30 PM Wed (Term 3	3	\$27.00	\$27.00
	Billy Jones - Seals - 9:30 AM Sun (Term 2 2014)	2	\$18.00	\$18.00
	Billy Jones - Seals - 9:30 AM Wed (Term 3 2014)	3	\$27.00	\$27.00
	Boys Bathers	1		
	Brendon Nightingale - Seals - 1:00 PM Wed (Term 2	2	\$9.00	\$9.00
	Bridgette Robinson - Turtles - 9:00 AM Wed (Term 2	2	\$13.50	\$13.50
	Bruce Taylor - Dolphins - 9:00 AM Sun (Term 2 2014)	2	\$18.00	\$18.00
	Caroline Thomson - Seals - 9:30 AM Fri (Term 2 2014)	2	\$18.00	\$18.00
	Caroline Thomson - Seals - 9:30 AM Fri (Term 3 2014)	4	\$36.00	\$36.00
	Celia Brown - Seals - 11:00 AM Wed (Term 3 2014)	3	\$27.00	\$27.00
	Celia Brown - Turtles - 9:00 AM Sun (Term 2 2014)	2	\$27.00	\$27.00
	Chupa Chups	5	\$3.00	\$0.39
	Coffee	2	\$8.00	\$1.04
	Corey Morrison - Seals - 1:00 PM Sun (Term 2 2014)	2	\$18.00	\$18.00
	Corey Morrison - Seals - 1:00 PM Wed (Term 3 2014)	3	\$27.00	\$27.00
	Craig King - Turtles - 9:00 AM Sun (Term 2 2014)	2	\$27.00	\$27.00
	Craig King - Turtles - 9:30 AM Sun (Term 3 2014)	3	\$40.50	\$40.50
	David King - Dolphins - 2:00 PM Fri (Term 2 2014)	2	\$18.00	\$18.00

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Totals by Location

This report displays the total sales grouped by the location the payment was processed.

Sales By Location - Ytd 2015					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
POS 1	61	\$3,050.30	\$3,008.81	\$41.49	100.00%
Total Sales	61	\$3,050.30	\$3,008.81	\$41.49	

With Detail

Sales By Location - Ytd 2015					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
POS 1	61	\$3,050.30	\$3,008.81	\$41.49	100.00%
Aqua Senior	1				
Boys Bathers	1				
Coffee	1	\$4.00	\$3.48	\$0.52	
Freddo Frog	1	\$0.60	\$0.52	\$0.08	
Lap Pass	1				
Lap Swim	3	\$8.00	\$6.96	\$1.04	
Lesson	41	\$2,732.00	\$2,732.00		
Missile Goggles	7	\$209.00	\$181.76	\$27.24	
Strobe	1	\$15.20	\$13.22	\$1.98	
Swim Nappy	1	\$18.50	\$16.09	\$2.41	
Vorgee Jnr	3	\$63.00	\$54.78	\$8.22	
Total Sales	61	\$3,050.30	\$3,008.81	\$41.49	

Sales by Group

This report displays a summary of sale items summarised by product group.

Sales By Group - May 2014					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Aqua	1				
Bathers	1				
Goggles	10	\$272.00	\$236.54	\$35.46	7.86%
Kiosk	1	\$4.00	\$3.48	\$0.52	0.12%
Lap Swim	4	\$8.00	\$6.96	\$1.04	0.23%
Lesson	41	\$2,732.00	\$2,732.00		90.80%
Not Defined	3	\$34.30	\$29.83	\$4.47	0.99%
Total Sales	61	\$3,050.30	\$3,008.81	\$41.49	

With Detail

Sales By Group - Ytd 2015					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Aqua	1				
Aqua Senior	1				
Bathers	1				
Boys Bathers	1				
Goggles	10	\$272.00	\$236.54	\$35.46	7.86%
Missile Goggles	7	\$209.00	\$181.76	\$27.24	
Vorgee Jnr	3	\$63.00	\$54.78	\$8.22	
Kiosk	1	\$4.00	\$3.48	\$0.52	0.12%
Coffee	1	\$4.00	\$3.48	\$0.52	
Lap Swim	4	\$8.00	\$6.96	\$1.04	0.23%
Lap Pass	1				
Lap Swim	3	\$8.00	\$6.96	\$1.04	
Lesson	41	\$2,732.00	\$2,732.00		90.80%
Lesson	41	\$2,732.00	\$2,732.00		
Not Defined	3	\$34.30	\$29.83	\$4.47	0.99%
Freddo Frog	1	\$0.60	\$0.52	\$0.08	
Strobe	1	\$15.20	\$13.22	\$1.98	
Swim Nappy	1	\$18.50	\$16.09	\$2.41	
Total Sales	61	\$3,050.30	\$3,008.81	\$41.49	

Sales by Type

This report displays a summary of sale items grouped by product type.

Sales By Type - May 2014					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Bathers	1				
Hot Drinks	1	\$4.00	\$3.48	\$0.52	0.12%
Lesson	37	\$2,792.00	\$2,792.00		92.79%
Not Defined	17	\$246.30	\$206.37	\$39.93	6.86%
Pass	5	\$8.00	\$6.96	\$1.04	0.23%
Total Sales	61	\$3,050.30	\$3,008.81	\$41.49	

With Detail

Sales By Type - Ytd 2015					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Bathers	1				
Boys Bathers	1				
Hot Drinks	1	\$4.00	\$3.48	\$0.52	0.12%
Coffee	1	\$4.00	\$3.48	\$0.52	
Lesson	37	\$2,792.00	\$2,792.00		92.79%
Lesson	37	\$2,792.00	\$2,792.00		
Not Defined	17	\$246.30	\$206.37	\$39.93	6.86%
Freddo Frog	1	\$0.60	\$0.52	\$0.08	
Lesson	4	-\$60.00	-\$60.00		
Missile Goggles	7	\$209.00	\$181.76	\$27.24	
Strobe	1	\$15.20	\$13.22	\$1.98	
Swim Nappy	1	\$18.50	\$16.09	\$2.41	
Vorjee Jnr	3	\$63.00	\$54.78	\$8.22	
Pass	5	\$8.00	\$6.96	\$1.04	0.23%
Aqua Senior	1				
Lap Pass	1				
Lap Swim	3	\$8.00	\$6.96	\$1.04	
Total Sales	61	\$3,050.30	\$3,008.81	\$41.49	

Sales by Category

This report displays a summary of sale items summarised by product category.

Sales By Category - May 2014					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Aqua	1				
Boys	1				
Drinks	1	\$4.00	\$3.48	\$0.52	0.12%
Lap Swim	4	\$8.00	\$6.96	\$1.04	0.23%
Lesson	41	\$2,732.00	\$2,732.00		90.80%
Not Defined	3	\$34.30	\$29.83	\$4.47	0.99%
Vorgee	10	\$272.00	\$236.54	\$35.46	7.86%
Total Sales	61	\$3,050.30	\$3,008.81	\$41.49	

With Detail

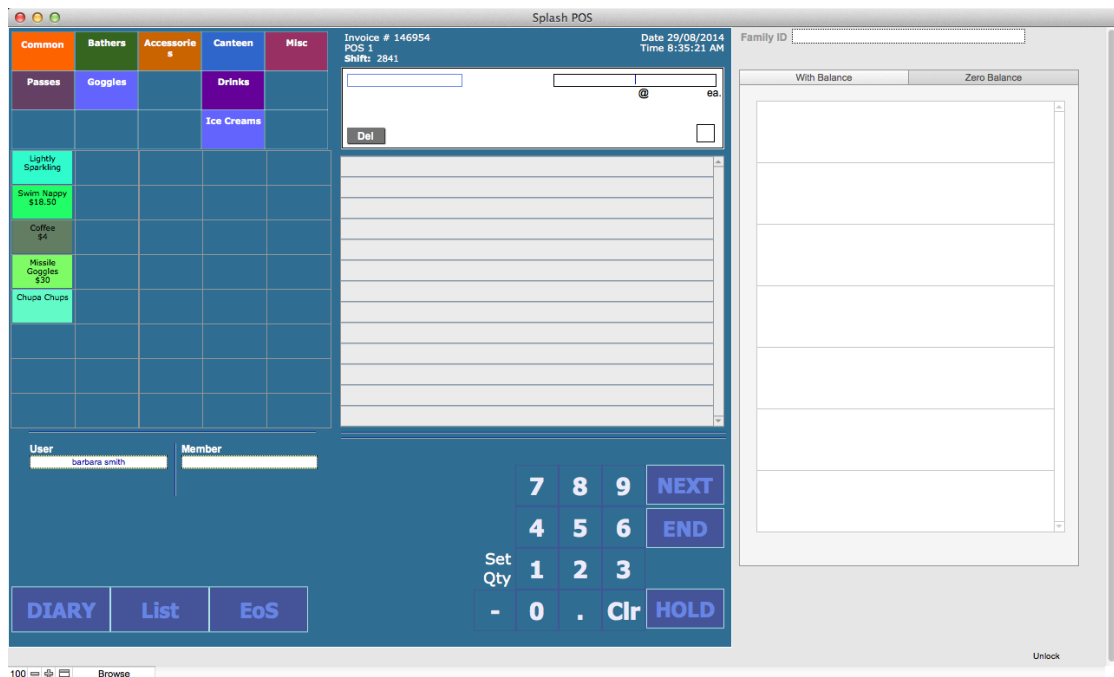
Sales By Category - Ytd 2015					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Aqua	1				
Aqua Senior	1				
Boys	1				
Boys Bathers	1				
Drinks	1	\$4.00	\$3.48	\$0.52	0.12%
Coffee	1	\$4.00	\$3.48	\$0.52	
Lap Swim	4	\$8.00	\$6.96	\$1.04	0.23%
Lap Pass	1				
Lap Swim	3	\$8.00	\$6.96	\$1.04	
Lesson	41	\$2,732.00	\$2,732.00		90.80%
Lesson	41	\$2,732.00	\$2,732.00		
Not Defined	3	\$34.30	\$29.83	\$4.47	0.99%
Freddo Frog	1	\$0.60	\$0.52	\$0.08	
Strobe	1	\$15.20	\$13.22	\$1.98	
Swim Nappy	1	\$18.50	\$16.09	\$2.41	
Vorgee	10	\$272.00	\$236.54	\$35.46	7.86%
Missile Goggles	7	\$209.00	\$181.76	\$27.24	
Vorgee Jnr	3	\$63.00	\$54.78	\$8.22	
Total Sales	61	\$3,050.30	\$3,008.81	\$41.49	

End of Day Procedures

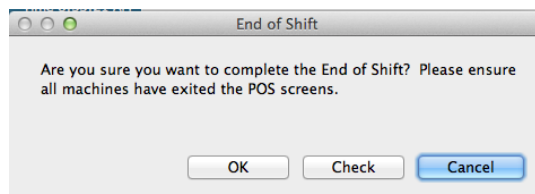
At the end of each business day you should reconcile the takings in your till drawer with transactions entered in the Splash POS system. End of day procedures begin in the sale entry screen.

Recording an End of Shift

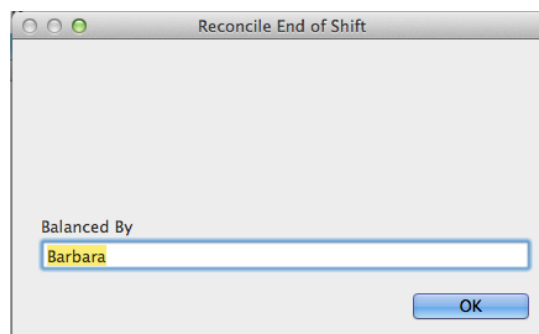
1. Click the POS \$ on the top right corner of the diary to ensure the POS Sale Entry screen is displayed.



2. Click once on the **EoS** (End of Shift) button displayed on the lower left of your screen.



3. You will be asked whether you want to end the shift or simply check the takings for the current shift.



4. You will be prompted to enter your name.

Reconcile End of Shift

Overview

Actual Cash

Transactions

ACTUAL Coins

5's	40	\$2.00
10's	23	\$2.30
20's	15	\$3.00
50's	34	\$17.00
\$1's	50	\$50.00
\$2's	34	\$68.00
Coin Value		\$142.30

ACTUAL Notes

\$5's	18	\$90.00
\$10's	125	\$1,250.00
\$20's	135	\$2,700.00
\$50's		\$0.00
\$100's		\$0.00
Notes Value		\$4,040.00

System Totals in POS / Actual Cash

Total Cash Counted	\$4,182.30
EFTPOS Receipts	\$1,549.10
Credit Card Receipts	\$485.45
Cheques	
Amex Receipts	
Counted Total Cash / Receipts	\$6,216.85
System Total Cash / Receipts	\$6,217.62

Variance -\$0.77

NOTES:

Unknown Variance

Done

- The Reconcile End of Shift dialog will be displayed on your screen. You will need to enter your takings in the fields provided on this dialog.
- Enter a breakdown of the cash you have counted from your till drawer. Enter the eftpos totals that have been printed from your eftpos machine.
- The figures you enter will be reconciled against the transactions you have processed. Any discrepancy between your takings and Splash will be displayed in the Variance field.

Reconcile End of Shift

Overview

Actual Cash

Transactions

Other Payments

Accounts	
Direct Debit	\$162.00
Internet	\$51.00
Journal	\$120.00
Promotion	
Redeemed Gift_Vouchers	
Management	
Other	
Session Pass	
Total Other Payments	\$333.00
Theoretical Cash / EFTPOS	\$6,217.62
Total Invoices / Sales	\$6,550.62

System Totals in POS / Actual Cash

Cash	\$4,183.07	\$4,182.30
EFTPOS	\$1,549.10	\$1,549.10
Credit Cards	\$485.45	\$485.45
Cheques		
Amex		
Total Cash / EFTPOS	\$6,217.62	\$6,216.85

Variance -\$0.77

NOTES:

Unknown Variance

Done

8. If there is a variance between the system figures and your counted receipts enter a reason within the Notes field. You cannot proceed without entering a Note when a variance occurs
9. Click the Done button to save the information and return to the POS Sale Entry screen.
10. The cashsheet will be printed when you click the Done button.

Cashsheet for 27/04/2014

Shift : 2841

Closed: 29/08/2014 8:39:13 AM

Balanced by: Barbara

	POS Totals	Actual Cash on Hand
Cash	\$4183.07	\$4182.30
EFTPOS	\$1549.10	\$1549.10
CreditCards	\$485.45	\$485.45
Cheques		
SubTotalB	<u>\$6217.62</u>	<u>\$6216.85</u>
Additional Payments		Till Variance - \$0.77
		Unknown Variance
Accounts		
Internet	\$51.00	
Journal	\$120.00	
Promotion		
Redeemed Gift Vouchers		
Management		
Other		
SubTotalA	<u>\$333.00</u>	
Total Invoices / Sales	<u>\$6550.62</u>	

ACTUAL Coins			ACTUAL Notes		
5's	<input type="text" value="40"/>	\$2.00	\$5's	<input type="text" value="18"/>	\$90.00
10's	<input type="text" value="23"/>	\$2.30	\$10's	<input type="text" value="125"/>	\$1,250.00
20's	<input type="text" value="15"/>	\$3.00	\$20's	<input type="text" value="135"/>	\$2,700.00
50's	<input type="text" value="34"/>	\$17.00	\$50's	<input type="text"/>	\$0.00
\$1's	<input type="text" value="50"/>	\$50.00	\$100's	<input type="text"/>	\$0.00
\$2's	<input type="text" value="34"/>	\$68.00			
		\$142.30			\$4,040.00
			Total Cash Counted		\$4,182.30
			Total Cheques		
			Total		<u>\$4,182.30</u>

Understanding Cashesheets

Each cashsheet contains a breakdown of transactions and takings for a specified shift. A shift can be any duration – you may have a single shift each day or multiple shifts within each day.

Each cashsheet compares the actual transactions with your counted takings for the day.

The screenshot shows the 'Point of Sale - Cashesheet' window for 18 February 2015. The 'Overview' tab is active, displaying a summary of payments and cash totals. The left sidebar shows a list of dates from September 2013 to April 2014, with 'Sun, 27 Apr 2014' selected. The main area shows the following data:

Other Payments	
Accounts	
Direct Debit	\$162.00
Internet	\$51.00
Journal	\$120.00
Promotion	
Redeemed Gift Vouchers	
Management	
Other	
Session Pass	
Total Other Payments	\$333.00
Theoretical Cash / EFTPOS	\$6,217.62
Total Invoices / Sales	\$6,550.62

System Totals in POS / Actual Cash	
Cash	\$4,183.07 / \$4,182.30
EFTPOS	\$1,549.10 / \$1,549.10
Credit Cards	\$485.45 / \$485.45
Cheques	
Amex	
Total Cash / EFTPOS	\$6,217.62 / \$6,216.85

Below the totals, there is a 'NOTES' section with a text area containing 'Unknown Variance' and a 'Variance' field showing '-\$0.77'.

The cashsheet overview displays the totals of all money received by payment method. It also displays the total transactions keyed and a comparison between what was processed and your physical cash on hand.

The screenshot shows the 'Actual Cash' tab of the cashsheet. It displays a record of the actual cash counted at the end of the shift. The left sidebar is the same as the previous screenshot. The main area shows the following data:

ACTUAL Coins	
5's	40
10's	23
20's	15
50's	34
1's	50
2's	34
Coin Value	\$142.30

ACTUAL Notes	
5's	18
10's	125
20's	135
50's	
100's	
Notes Value	\$4,040.00

The total cash counted is displayed as \$4,182.30.

The second tab card in the cashsheet displays a record of the actual cash which was counted at the end of the shift. These numbers can be viewed but not changed after the End of Shift is processed.

The screenshot shows the 'Transactions' tab of the cashsheet. It displays a list of all transactions entered during the shift. The left sidebar is the same as the previous screenshots. The main area shows a table with the following columns: Date, Time, Sale ID, Family ID, Family, Invoice Total, and Payment Type.

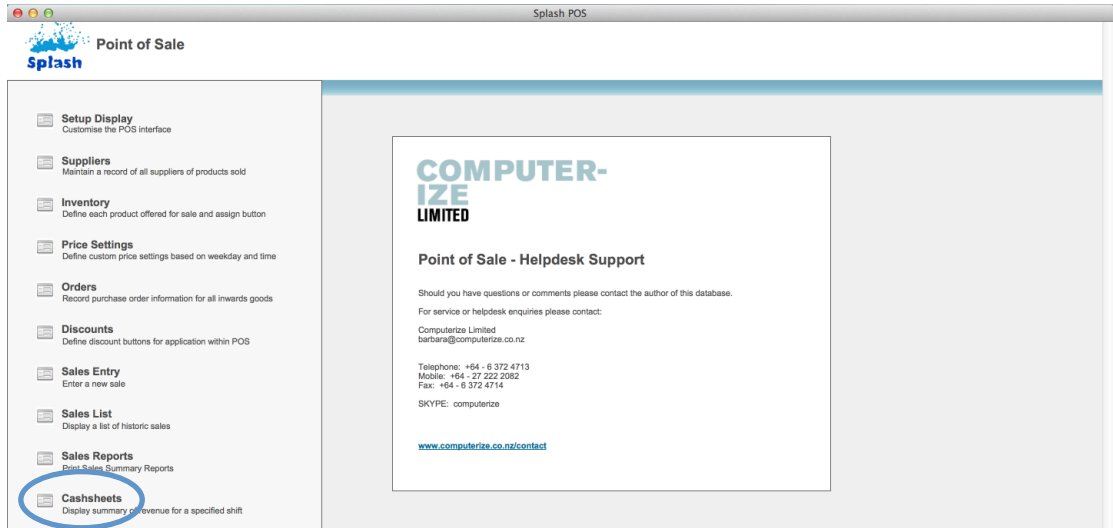
Date	Time	Sale ID	Family ID	Family	Invoice Total	Payment Type
27/04/14	5:36 PM	146827	16	KING (Nathan King)	\$108.00	Nathan King
27/04/14	5:36 PM	146828			\$0.00	Cash Sale
28/04/14	11:46 AM	146829	14	ZIMMERMAN (Andy zimmerman)	\$108.00	Andy zimmerman
28/04/14	11:47 AM	146830			\$0.00	Cash Sale
28/04/14	11:49 AM	146831	23	MCARTHUR (Andrew McArthur)	\$162.00	Andrew McArthur
28/04/14	11:50 AM	146832			\$0.00	Cash Sale
28/04/14	12:43 PM	146833	2	SMITH (Barbara Smith)	\$102.00	Barbara Smith
28/04/14	12:43 PM	146834			\$0.00	Cash Sale
28/04/14	12:48 PM	146835			\$21.00	Cash Sale
28/04/14	12:48 PM	146836			\$21.00	Cash Sale
28/04/14	12:49 PM	146837	2	SMITH (Barbara Smith)	\$27.00	Barbara Smith
28/04/14	12:51 PM	146838			\$0.00	Cash Sale
28/04/14	2:57 PM	146839	2	SMITH (Barbara Smith)	\$100.00	Barbara Smith
28/04/14	2:58 PM	146840			\$0.00	Cash Sale
28/04/14	3:01 PM	146841	15	THOMSON (Anthony Thomson)	\$180.00	Anthony
28/04/14	3:02 PM	146842			\$0.00	Cash Sale
28/04/14	3:31 PM	146843			\$0.00	Cash Sale
28/04/14	4:09 PM	146844			\$0.00	Cash Sale
28/04/14	4:09 PM	146845				Cash Sale
28/04/14	4:09 PM	146846				Cash Sale
29/04/14	12:46 PM	146847	21	WILLIAMS (Malcolm Williams)	\$108.00	Malcolm Williams
29/04/14	12:47 PM	146848			\$0.00	Cash Sale
29/04/14	12:47 PM	146849	46	SOLOMAN (Matthew Solomon)	\$108.00	Matthew
29/04/14	12:48 PM	146850			\$0.00	Cash Sale

The final tabcard in the cashsheet displays a list of all transactions entered during the shift.

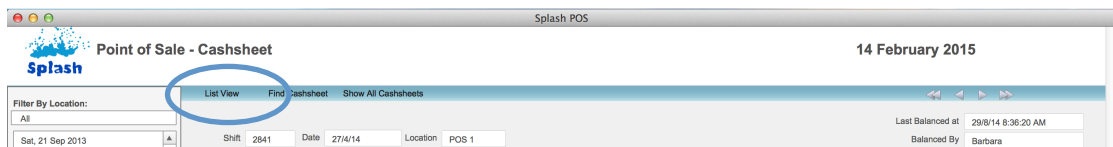
Displaying a List of Cashesheets

Each record in your Cashesheet module can be displayed in either a form view or as part of a list. List view displays all records in the found set.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Cashesheet** on the left of your screen.



3. The Point of Sale – Cashesheet Screen will be displayed.
4. Click once on the **List View** button displayed in the blue stripe at the top of your screen.



5. All records in the found set will be displayed in the list.

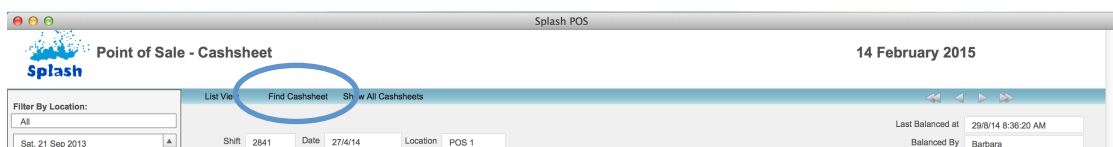
The screenshot shows the 'Point of Sale - Cashesheets' screen with a list of cashsheet records. The table has columns for Date, Shift, Location, Shift Total, Other Pmts, Cash, Eftpos, Credit Card, Amex, Cheque, POS Cash/Eftpos, Actual Cash/Eftpos, and Variance.

Sort By	Date	Shift	Location	Shift Total	Other Pmts	Cash	Eftpos	Credit Card	Amex	Cheque	POS Cash/Eftpos	Actual Cash/Eftpos	Variance
	20/04/14	2838	POS 1	\$1689.70		\$879.50	\$730.00	\$80.20			\$1689.70	\$1615.05	-\$74.65
	21/04/14	2839	POS 1	\$378.40		\$484.40	-\$86.00				\$378.40	\$9.05	-\$369.35
	26/04/14	2840	POS 1	\$511.15		\$487.50	\$23.65				\$511.15	\$0.00	-\$511.15
	27/04/14	2841	POS 1	\$6550.62	\$333.00	\$4183.07	\$1549.10	\$485.45			\$6217.62	\$6216.85	-\$0.77

NB: Display the detail of a selected cashsheet by clicking the goggles displayed to the left of the date.

Finding a Cashesheet

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Cashesheet** on the left of your screen.
3. Click once on the **Find Cashesheet** button displayed in the blue stripe at the top of your screen.



4. A blank Cashesheet will be displayed on your screen.
5. Enter the criteria for your find in the appropriate field/s.

6. Press ENTER or click the **Continue** button to complete the find.

Viewing Cashesheet Details

1. Use the **Finding a Cashesheet** function to locate the record you wish to view.
2. The Cashesheet entry form should be displayed on your screen.
3. Update any details as required.

Displaying a list of Daily Transactions

In addition to displaying system totals, the cashsheet record also contains a list of all transactions processed on the selected date.

1. Use the **Finding a Cashesheet** function to locate the record you wish to view.
2. The Cashesheet entry form should be displayed on your screen.
3. Click once on the Transactions tab card located on the right of your screen.

Point of Sale - Cashesheet 14 February 2015

Filter By Location: All

Shift: 2841 Date: 27/4/14 Location: POS 1

Last Balanced at: 29/8/14 8:36:20 AM
Balanced By: Barbara

Date	Time	Sale ID	Family ID	Family	Invoice Total	Payment Type	
1/05/14	11:13 AM	146880	33	TAYLOR (Martha Taylor)	\$108.00	Martha Taylor	
1/05/14	11:15 AM	146881			\$0.00	Cash Sale	
1/05/14	11:15 AM	146882	23	MCARTHUR (Andrew McArthur)	\$0.00	Andrew McArthur	
1/05/14	11:25 AM	146883	73	JONES (David Jones)	\$6.50	David Jones	
1/05/14	11:26 AM	146884			\$0.00	Cash Sale	
1/05/14	11:27 AM	146885			\$0.00	Cash Sale	
1/05/14	11:28 AM	146886			\$0.00	Cash Sale	
1/05/14	12:40 PM	146887	51	APOLLO (Martha Apollo)	\$0.00	Martha Apollo	
1/05/14	5:03 PM	146888	32	SINCLAIR (Linley Sinclair)	\$243.00	Linley Sinclair	
1/05/14	5:03 PM	146889			\$0.00	Cash Sale	
1/05/14	6:30 PM	146890	14	ZIMMERMAN (Andy zimmerman)	\$54.00	Andy zimmerman	
1/05/14	6:39 PM	146891	27	BUCHANAN (Debbie Buchanan)	\$36.00	Debbie	
1/05/14	6:40 PM	146892				Cash Sale	
1/05/14	6:42 PM	146893				Cash Sale	
1/05/14	6:42 PM	146894				Cash Sale	
1/05/14	6:42 PM	146895				Cash Sale	
1/05/14	6:43 PM	146896				Cash Sale	
2/05/14	12:08 PM	146897	15	THOMSON (Anthony Thomson)	\$189.00	Anthony	
2/05/14	12:10 PM	146898			\$0.00	Cash Sale	
2/05/14	12:30 PM	146899	2	SMITH (Barbara Smith)	\$97.50	Barbara Smith	
2/05/14	12:31 PM	146900			\$0.00	Cash Sale	
2/05/14	2:58 PM	146901			\$4.00	Cash Sale	
2/05/14	3:00 PM	146902			\$0.00	Cash Sale	
2/05/14	4:12 PM	146903	?		\$0.00		
2/05/14	4:12 PM	146904	9	SMITH (Daniel Smith)	\$108.00	Daniel	

4. This screen displays a single line for each transaction, it does not display the method of payment or the content of each transaction.

Deleting a Cashesheet Record

Cashesheet records cannot be deleted.

Printing a Cashesheet

Although the cashsheet is always printed at the time the End of Shift is performed there are times when you may need to reprint a historic report. This report displays the system total and actual receipts for a selected date.

1. Use the **Finding a Cashesheet** function to locate the cashsheet you wish to print.
2. Click the **Print** button displayed in the centre of your screen.

3. The cashsheet report will be sent directly to the printer..

Cashesheet for 27/04/2014

Shift : 2841

Closed: 29/08/2014 8:39:13 AM

Balanced by: Barbara

	POS Totals	Actual Cash on Hand
Cash	\$4183.07	\$4182.30
EFTPOS	\$1549.10	\$1549.10
CreditCards	\$485.45	\$485.45
Cheques		
SubTotalB	\$6217.62	\$6216.85

Till Variance -\$0.77

Unknown Variance

Additional Payments

Accounts	
Internet	\$51.00
Journal	\$120.00
Promotion	
Redeemed Gift Vouchers	
Management	
Other	
SubTotalA	\$333.00
Total Invoices / Sales	\$6550.62

ACTUAL Coins		ACTUAL Notes	
5's	40	\$5's	18
10's	23	\$10's	125
	\$2.00		\$90.00
	\$2.30		\$1,250.00

RGB Colour Palette

255, 255, 255	255,255,204	255,255,153	255,255,102	255,255,51	255,255,0
255,204,255	255,204,204	255,204,153	255,204,102	255,204,51	255,204,0
255,153,255	255,153,204	255,153,153	255,153,102	255,153,51	255,153,0
255,102,255	255,102,204	255,102,153	255,102,102	255,102,51	255,102,0
255,51,255	255,51,204	255,51,153	255,51,102	255,51,51	255,51,0
255,0,255	255,0,204	255,0,153	255,0,102	255,0,51	255,0,0
204,255,255	204,255,204	204,255,153	204,255,102	204,255,51	204,255,0
204,204,255	204,204,204	204,204,153	204,204,102	204,204,51	204,204,0
204,153,255	204,153,204	204,153,153	204,153,102	204,153,51	204,153,0
204,102,255	204,102,204	204,102,153	204,102,102	204,102,51	204,102,0
204,51,255	204,51,204	204,51,153	204,51,102	204,51,51	204,51,0
204,0,255	204,0,204	204,0,153	204,0,102	204,0,51	204,0,0
153,255,255	153,255,204	153,255,153	153,255,102	153,255,51	153,255,0
153,204,255	153,204,204	153,204,153	153,204,102	153,204,51	153,204,0
153,153,255	153,153,204	153,153,153	153,153,102	153,153,51	153,153,0
153,102,255	153,102,204	153,102,153	153,102,102	153,102,51	153,102,0
153,51,255	153,51,204	153,51,153	153,51,102	153,51,51	153,51,0
153,0,255	153,0,204	153,0,153	153,0,102	153,0,51	153,0,0

102,255,255	102,255,204	102,255,153	102,255,102	102,255,51	102,255,0
102,204,255	102,204,204	102,204,153	102,204,102	102,204,51	102,204,0
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102,0,255	102,0,204	102,0,153	102,0,102	102,0,51	102,0,0
51,255,255	51,255,204	51,255,153	51,255,102	51,255,51	51,255,0
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51,51,255	51,51,204	51,51,153	51,51,102	51,51,51	51,51,0
51,0,255	51,0,204	51,0,153	51,0,102	51,0,51	51,0,0
0,255,255	0,255,204	0,255,153	0,255,102	0,255,51	0,255,0
0,204,255	0,204,204	0,204,153	0,204,102	0,204,51	0,204,0
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0,102,255	0,102,204	0,102,153	0,102,102	0,102,51	0,102,0
0,51,255	0,51,204	0,51,153	0,51,102	0,51,51	0,51,0