

# Splash V7

User Documentation - Bookings

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## 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 menu bar includes File, Edit, View, Insert, Format, Bookings, Scripts, Print, and Tools. The main interface is divided into several sections:

- Filter By Student Name:** A search bar with 'Everyone' selected, and a list of students including Amanda Brown, Anthony Apollo, Barry Robinson, Benjamin Nightingale, Benjamin Williams, Billy Jones, Bobby Thomson, Brenda Thomas, Bridgette Robinson, Bruce Taylor, Caroline Thomson, Corey Morrison, Craig King, David King, Debra Patterson, Frederick Buchanan, Gareth Buchanan, Georgia Taylor, Gregory Hargreaves, Hamish McDougal, Harry Williams, Hayden Hugheson, Jack McArthur, Jacob (Jake) Smith (highlighted), James Gill, James Wilson, Jamie Anderson, Jamie Watson, Jane White, Janet Kimble, and Jason Smith.
- Student Information:** Fields for Student ID (13), Name (Jacob (Jake) Smith), Gender (Male), Age (5.5m), Medical, Contact (Barbara Smith), and Telephone (0272222082). There is also a photo of the student and a 'Student Exited' checkbox.
- Session Details:** A tab card showing Class ID (PEN), Class Name (Penguin), Class Level (3), Student Level (3), Programme (Preschool), Instructor (Barbara Smith), Location (Main Pool), Start Date (11/1/2018), End Date (25/1/2018), Start Time (3:30 PM), Weekday (Thursday), Block (Jan), Year (2018), Shift (Afternoon), and No. of Lessons (3).
- Cost of Booking:** A section showing the cost breakdown: Initial Cost (\$61.50), Discount Applied (\$6.15), Credit Applied (\$0.00), Value of Free Lessons (\$0.00), Exit Value Written Off (\$0.00), Late Payment Fee (\$0.00), Payments Received (\$0.00), and Balance Due (\$55.35). There is also a 'Payment Required By' date of 11/1/18 and a 'Take Payment by Bank Debit' button.

**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

**Achievements** – 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 'Achievements' tab in the Splash Bookings software. The interface includes a menu bar (File, Edit, View, Insert, Format, Bookings, Scripts, Print, Tools) and a toolbar. The main area is divided into several sections:

- Filter By Student Name:** A dropdown menu set to 'Everyone' and a date selector for 'Jan 2018'.
- Student List:** A list of students with columns for Name, Class, and Status. 'Jacob (Jake) Smith' is highlighted in blue.
- Student Details:** A form for 'Jacob (Jake) Smith' with fields for Name, Gender (Male), Age (5\_5m), Medical, Contact (Barbara Smith), and Telephone (0272222082). There is also a 'Comments' text area and a 'Student Exited' checkbox.
- Session Details:** A form showing 'Class ID: PEN', 'Session ID: 3498', 'Class Name: Penguin', 'Class Level: 3', 'Student Level: 3', 'Programme: Preschool', 'Instructor: Barbara Smith', 'Location: Main Pool', 'No. of Lessons: 3', 'Start Date: 11/1/2018', 'End Date: 25/1/2018', 'Start Time: 3:30 PM', 'Weekday: Thursday', and 'Block: Jan'. There is a 'Makeup' checkbox set to 'No'.
- Achievements Table:** A table with columns for 'Student Level' (set to 3), 'Goal Status', 'Date Achieved', and 'Last Goal Achieved'. It lists four goals:
  - 1 Blowing Bubbles Eyes Under
  - 2 Freestyle kick with board
  - 3 A torpedo
  - 4 4 circle arms
- Assessment Section:** Fields for 'Assessed', 'Certificate Issued', 'Rollover This Booking' (Yes/No), and 'Rebooked Next Block' (No).

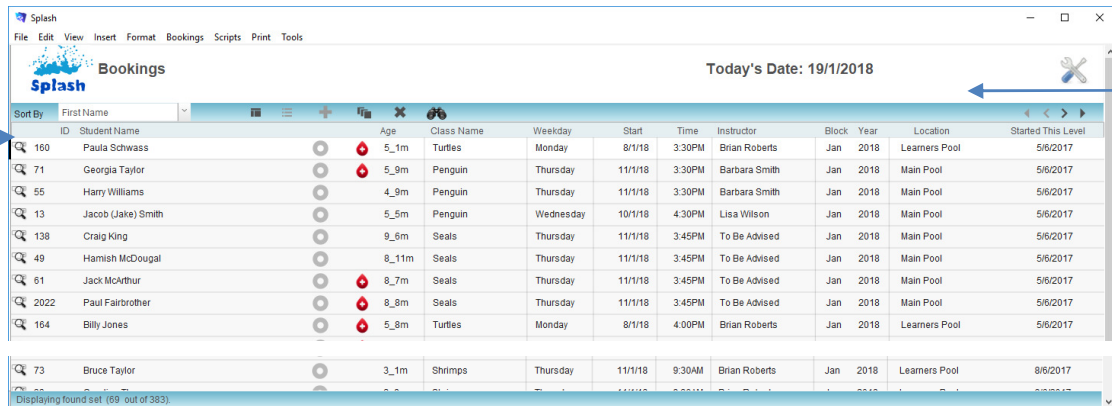
**Comments**– displays two types of comments; Booking Comments and Transfer Notes. Transfer notes can be edited manually, however are updated by Splash whenever a student booking is changed from one session to another. Transfer notes will show the details of the previous booking held.

The screenshot shows the 'Comments' tab in the Splash Bookings software. The interface is similar to the 'Achievements' tab but with different data:

- Filter By Student Name:** A dropdown menu set to 'Remove Filter' and a date selector for 'Jan 2018'.
- Student List:** A list of students with columns for Name, Class, and Status. 'Jacob (Jake) Smith' is highlighted in blue.
- Student Details:** A form for 'Jacob (Jake) Smith' with fields for Name, Gender (Male), Age (5\_6m), Medical, Contact (Barbara Smith), and Telephone (0272222082). There is also a 'Comments' text area and a 'Student Exited' checkbox.
- Session Details:** A form showing 'Class ID: PEN', 'Session ID: 3484', 'Class Name: Penguin', 'Class Level: 3', 'Student Level: 3', 'Programme: Preschool', 'Instructor: To Be Advised', 'Location: Main Pool', 'No. of Lessons: 4', 'Start Date: 12/1/2018', 'End Date: 26/1/2018', 'Start Time: 10:30 AM', 'Weekday: Friday', and 'Block: Jan'. There is a 'Makeup' checkbox set to 'No'.
- Comments Section:** A large text area for 'Comments' and a section for 'Transfer Notes' containing the text: 'Previously booked in Penguin on Wednesday at 4:00 PM with Lisa Wilson, moved to Penguin on Friday at 10:30 AM with To Be Advised on 23/1/2018.'

## Listing Booking Records

Each record in your database can be displayed in either form view 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 Bookings Today's Date: 19/1/2018

Sort By: First Name

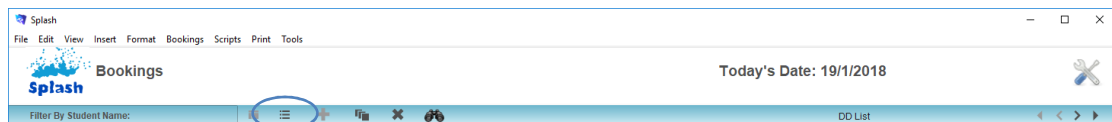
ID	Student Name	Age	Class Name	Weekday	Start	Time	Instructor	Block	Year	Location	Started This Level
160	Paula Schwass	5_1m	Turtles	Monday	8/1/18	3:30PM	Brian Roberts	Jan	2018	Learners Pool	5/6/2017
71	Georgia Taylor	5_9m	Penguin	Thursday	11/1/18	3:30PM	Barbara Smith	Jan	2018	Main Pool	5/6/2017
55	Harry Williams	4_9m	Penguin	Thursday	11/1/18	3:30PM	Barbara Smith	Jan	2018	Main Pool	5/6/2017
13	Jacob (Jake) Smith	5_5m	Penguin	Wednesday	10/1/18	4:30PM	Lisa Wilson	Jan	2018	Main Pool	5/6/2017
138	Craig King	9_6m	Seals	Thursday	11/1/18	3:45PM	To Be Advised	Jan	2018	Main Pool	5/6/2017
49	Hamish McDougal	8_11m	Seals	Thursday	11/1/18	3:45PM	To Be Advised	Jan	2018	Main Pool	5/6/2017
61	Jack McArthur	8_7m	Seals	Thursday	11/1/18	3:45PM	To Be Advised	Jan	2018	Main Pool	5/6/2017
2022	Paul Fairbrother	8_8m	Seals	Thursday	11/1/18	3:45PM	To Be Advised	Jan	2018	Main Pool	5/6/2017
164	Billy Jones	5_8m	Turtles	Monday	8/1/18	4:00PM	Brian Roberts	Jan	2018	Learners Pool	5/6/2017
73	Bruce Taylor	3_1m	Shrimps	Thursday	11/1/18	9:30AM	Brian Roberts	Jan	2018	Learners Pool	8/6/2017

Displaying found set (69 out of 383).

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

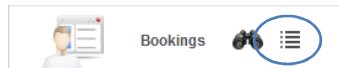
### Displaying a List of Bookings

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

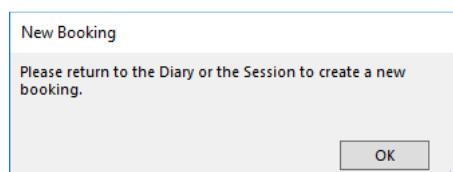


3. The Booking List View screen will be displayed

## Creating 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.

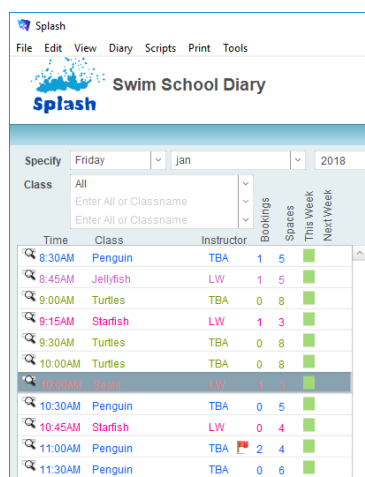
Bookings can only be created from either the Diary or the Session screen. If you attempt to create a booking within the Bookings module the following dialog will be displayed.



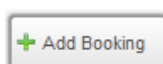
### Creating a New Booking in the Diary

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.

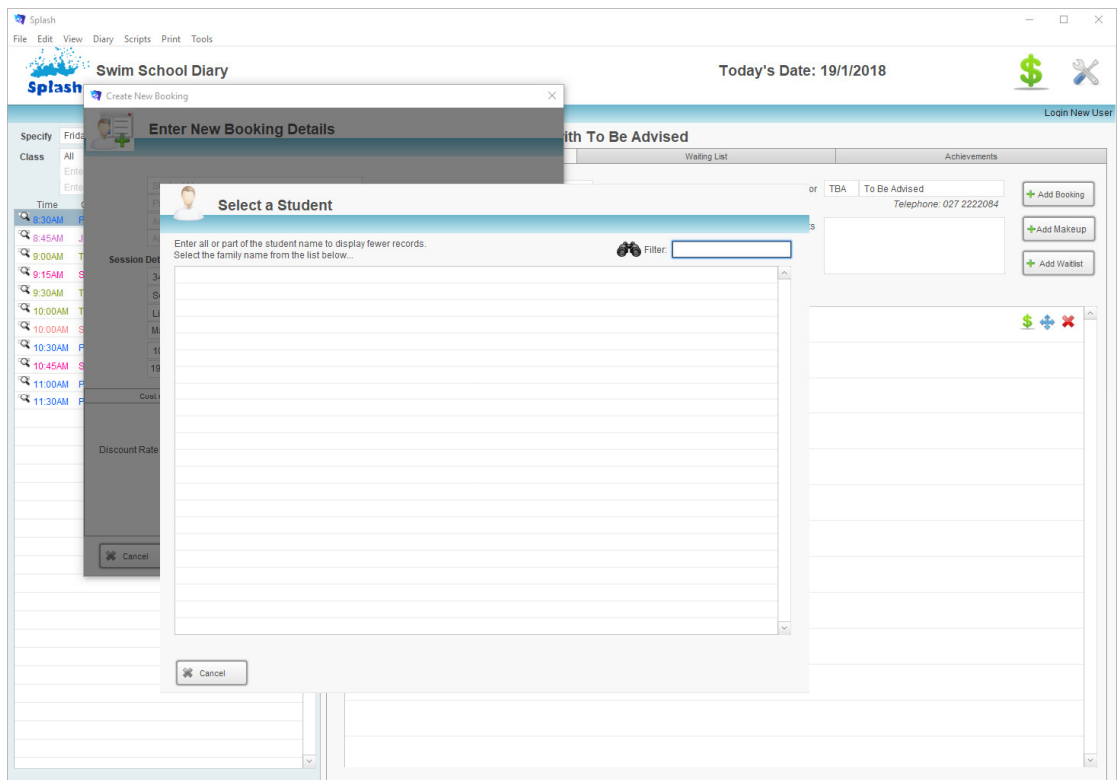
1. Select the required Day, Term and Year at the top of the diary screen to locate the session you wish to book the student in to.
2. Within the left pane, click once on the session you wish to book the student in to.



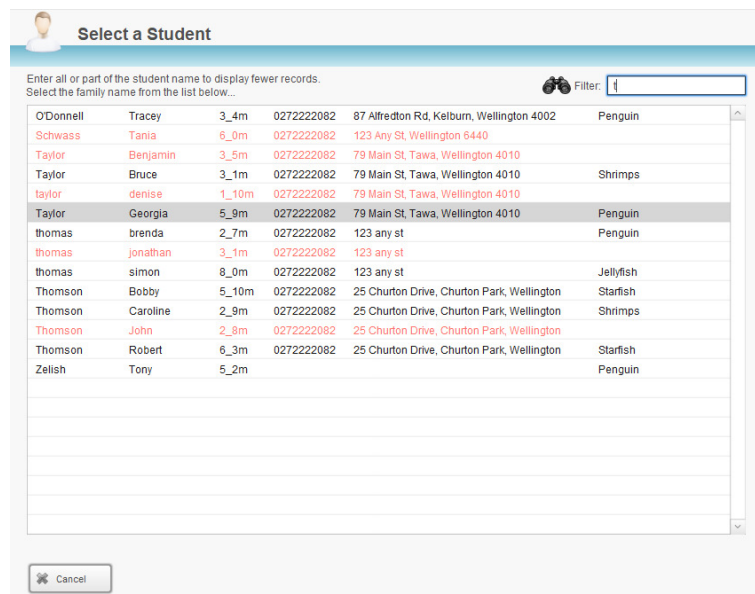
3. Current bookings for the selected session will be displayed on the right of your screen.



4. Click once on the **Add Booking** button to display the **Select a Student** dialog.



5. Enter either the student first name or last name (or part thereof) in the **Filter** box to display a list of all students matching the name entered.



6. Click on the name, age or 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

Georgia Taylor

0272222082

79 Main St, Tawa, Wellington 4010

5\_9m

Female

# Bookings This Block 3

Session Details

3463

SEA

Jan

2018

Seals

Lisa Wilson

Main Pool

10:00 AM

No. of Lessons 2

19/1/18

Friday

26/1/18

Cost of Lessons

Direct Debit

Comments

Cost Per Session

@

\$20.00

Initial Cost

\$40.00

Discount Rate

10

Discount Type

Percent

Discount Applied

\$4.00

Payment Due By

19/1/2018

Value of Free Lessons

\$0.00

Payment by Direct Debit

Balance Due

\$36.00

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.



## 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 'Splash Bookings' interface. On the left is a list of students with columns for Name, Class, and Day. 'Jacob (Jake) Smith' is selected. The main area displays student details: Student ID 13, Name Jacob (Jake) Smith, Gender Male, Age 5\_5m, Contact Barbara Smith, and Telephone 0272222082. A photo of the student is shown. To the right, session details are listed: Class ID PEN, Session ID 3498, Class Name Penguin, Class Level 3, Student Level 3, Programme Preschool, Instructor Barbara Smith, Location Main Pool, No. of Lessons 3, Start Date 11/1/2018, End Date 25/1/2018, Start Time 3:30 PM, Weekday Thursday, Block Jan, Year 2018, Shift Afternoon. At the bottom, there are tabs for Payments, Attendance, Achievements, and Comments. The Payments tab shows a cost of \$51.50, a discount of \$6.15, and a balance due of \$55.35. The Attendance tab shows a list of dates and a 'Student Attendance' section.

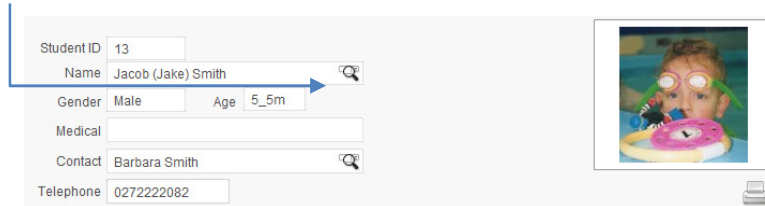
## Navigating to the Student Details

Click the magnifier to the right of the student's name

This is a close-up of the student details form. It includes fields for Student ID (13), Name (Jacob (Jake) Smith), Gender (Male), Age (5\_5m), Medical, Contact (Barbara Smith), and Telephone (0272222082). A magnifying glass icon is positioned to the right of the Name field, indicating where to click to view more details.

### Transferring a Booking to Another Student

Hold down the Shift Key while you click the magnifier to the right of the student's name



Student ID 13  
Name Jacob (Jake) Smith  
Gender Male Age 5\_5m  
Medical  
Contact Barbara Smith  
Telephone 0272222082

A magnifier icon is located to the right of the Name field. A blue arrow points from the text above to this magnifier icon.

### Navigating to the Family Details

Click the magnifier to the right of the contact's name

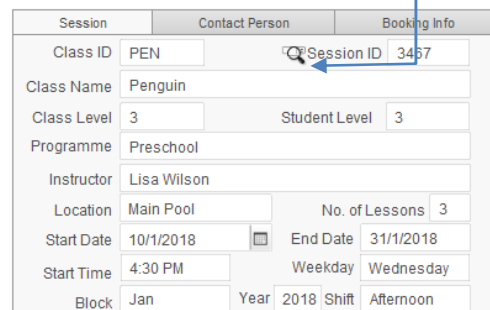


Student ID 13  
Name Jacob (Jake) Smith  
Gender Male Age 5\_5m  
Medical  
Contact Barbara Smith  
Telephone 0272222082

A magnifier icon is located to the right of the Contact field. A blue arrow points from the text above to this magnifier icon.

### Navigating to the Session Details

Click the magnifier to the left of the Session ID

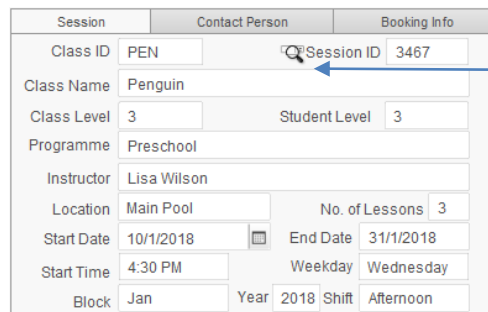



Session	Contact Person	Booking Info
Class ID	PEN	Session ID 3457
Class Name	Penguin	
Class Level	3	Student Level 3
Programme	Preschool	
Instructor	Lisa Wilson	
Location	Main Pool	No. of Lessons 3
Start Date	10/1/2018	End Date 31/1/2018
Start Time	4:30 PM	Weekday Wednesday
Block	Jan	Year 2018 Shift Afternoon

A magnifier icon is located to the left 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 left of the Session ID



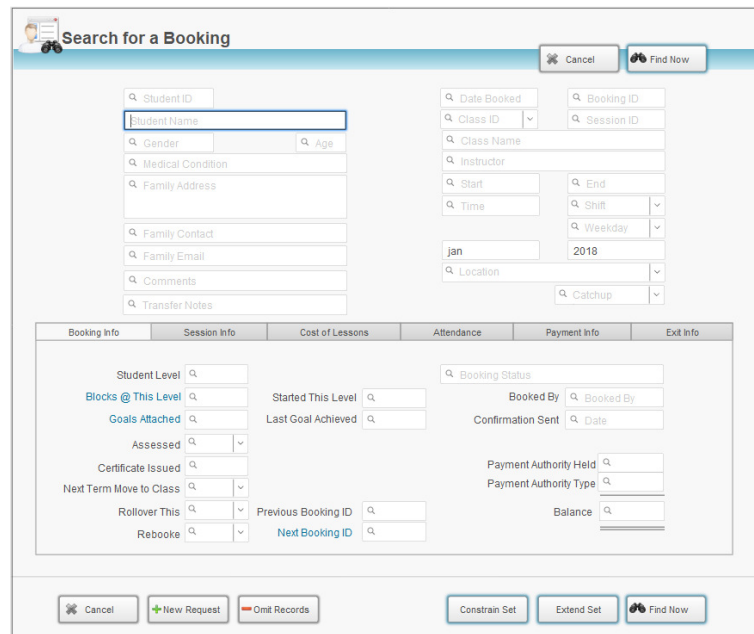
Session		Contact Person	Booking Info	
Class ID	PEN			Session ID 3467
Class Name	Penguin			
Class Level	3	Student Level	3	
Programme	Preschool			
Instructor	Lisa Wilson			
Location	Main Pool	No. of Lessons	3	
Start Date	10/1/2018	End Date	31/1/2018	
Start Time	4:30 PM	Weekday	Wednesday	
Block	Jan	Year	2018	Shift Afternoon

## 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.



**Search for a Booking**

Cancel Find Now

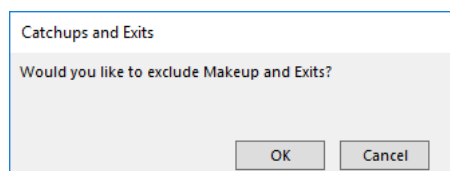
Student ID:   
Student Name:   
Gender:  Age:   
Medical Condition:   
Family Address:   
Family Contact:   
Family Email:   
Comments:   
Transfer Notes:

Date Booked:  Booking ID:   
Class ID:  Session ID:   
Class Name:   
Instructor:   
Start:  End:   
Time:  Shift:   
Weekday:   
jan 2018  
Location:   
Catchup:

Booking Info	Session Info	Cost of Lessons	Attendance	Payment Info	Exit Info
Student Level: <input type="text"/> Blocks @ This Level: <input type="text"/> Goals Attached: <input type="text"/> Assessed: <input type="text"/> Certificate Issued: <input type="text"/> Next Term Move to Class: <input type="text"/> Rollover This: <input type="text"/> Rebook: <input type="text"/>	Started This Level: <input type="text"/> Last Goal Achieved: <input type="text"/> Previous Booking ID: <input type="text"/> Next Booking ID: <input type="text"/>	Booking Status: <input type="text"/> Booked By: <input type="text"/> Confirmation Sent: <input type="text"/> Payment Authority Held: <input type="text"/> Payment Authority Type: <input type="text"/> Balance: <input type="text"/>			

Cancel New Request Omit Records Constrain Set Extend Set 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. You will be asked whether you want to include Makeup and Exits in the found set of records. Click OK or Cancel to continue.



**Catchups and Exits**

Would you like to exclude Makeup and Exits?

OK Cancel

7. 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.

Splash

File Edit View Insert Format Bookings Scripts Print Tools

**Bookings** Today's Date: 19/1/2018

Sort By: First Name

ID	Student Name	Age	Class Name	Weekday	Start	Time	Instructor	Block	Year	Location	Started This Level
160	Paula Schwass	5_1m	Turtles	Monday	8/1/18	3:30PM	Brian Roberts	Jan	2018	Learners Pool	5/6/2017
71	Georgia Taylor	5_9m	Penguin	Thursday	11/1/18	3:30PM	Barbara Smith	Jan	2018	Main Pool	5/6/2017
55	Harry Williams	4_9m	Penguin	Thursday	11/1/18	3:30PM	Barbara Smith	Jan	2018	Main Pool	5/6/2017
13	Jacob (Jake) Smith	5_5m	Penguin	Wednesday	10/1/18	4:30PM	Lisa Wilson	Jan	2018	Main Pool	5/6/2017

**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.

3. The Select a Student dialog box will be displayed on your screen.

Student Name	Age	Gender	Telephone	Address	Class Name
Smith Jacob	5_5m		0272222082	6A Erlestoke Crescent, Churton Park,	Penguin
Smith Jason	6_4m		0272222082	89 Roberta Road, Tawa 4008	Turtles
Smith Jennifer	2_9m		0272222082	89 Roberta Road, Tawa 4008	Jellyfish
Smith John	5_8m		0272222082	89 Roberta Road, Tawa 4008	
Smith Lucas	5_7m		0272222082	6A Erlestoke Crescent, Churton Park,	Penguin
Smith Nicholas	6_3m		0272222082	6A Erlestoke Crescent, Churton Park,	Turtles
Smith Phillip	6_1m		0272222082	89 Roberta Road, Tawa 4008	Penguin
Smith Sam	6_3m		0272222082	6A Erlestoke Crescent, Churton Park,	
Smith William	7_11m		0272222082	123 Any St, Wellington	Jellyfish

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 displays the 'Splash Bookings' application window. The top menu bar includes File, Edit, View, Insert, Format, Bookings, Scripts, Print, and Tools. The title bar shows 'Splash' and standard window controls. The main interface is divided into several sections:

- Filter By Student Name:** A search bar with 'sam' entered, a dropdown for 'Jan', and a year selector for '2018'. Below this is a 'Display First Name' dropdown and a list of students: 'sam jones' (DOL, Su) and 'Sam Smith' (PEN, W).
- Student Information:** Fields for Student ID (15), Name (Sam Smith), Gender (Male), Age (6\_3m), Medical (Asthma), Contact (Barbara Smith), and Telephone (0272222082). There is also a 'Comments' text area and a 'Student Exited' checkbox.
- Session Details:** A 'DD List' tab showing session information: Class ID (PEN), Session ID (3467), Class Name (Penguin), Class Level (3), Student Level (3), Programme (Preschool), Instructor (Lisa Wilson), Location (Main Pool), No. of Lessons (3), Start Date (10/1/2018), End Date (31/1/2018), Start Time (4:30 PM), Weekday (Wednesday), Block (Jan), Year (2018), Shift (Afternoon), and Makeup (No).
- Cost of Booking:** A section with tabs for Payments, Attendance, Achievements, and Comments. It includes a 'Student Attendance' table with dates (11/1/2018, 18/1/2018, 24/1/2018, 31/1/2018) and a 'Cost of Booking' summary:
 

Item	Value
Initial Cost	\$61.50
Discount Applied	\$6.15
Credit Applied	
Value of Free Lessons	\$0.00
Exit Value Written Off	
Late Payment Fee	\$0.00
Payments Received	\$0.00
Balance Due	\$55.35

- The selected student information will be displayed in the booking.

**NB:** If the replacement student has a permanent discount on file the price of the current booking may change.

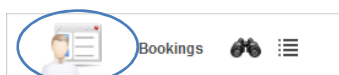
## Updating Student Booking Details

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. The steps below enable you to update student information; it should be used if you have created a booking and later changed any information in the student file.

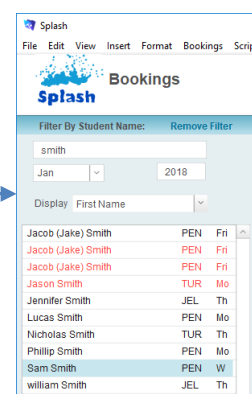
Student details can be updated for a single student or for all students in the found set.

### Updating Student Details for the Current Record

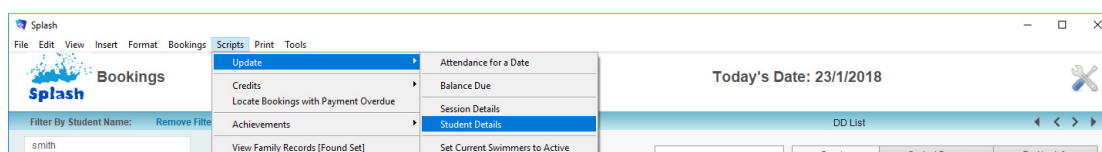
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



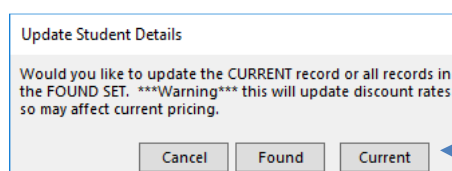
3. The Booking data entry screen will be displayed, enter the criteria for the record you wish to update in the filter fields at the top of the portal list on the left of your screen.
4. Using the portal on the left of the screen, click once on booking you wish to update.
5. The portal row will be highlighted 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**.



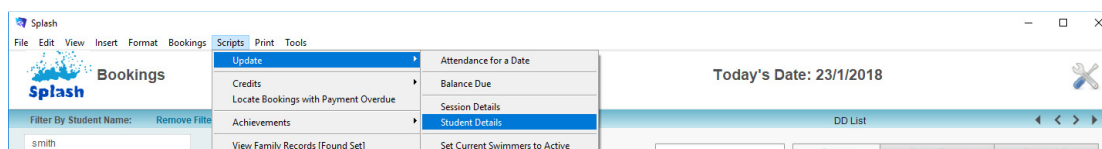
7. The Update Student Details dialog will be displayed on your screen. Click once on the **Current** button.



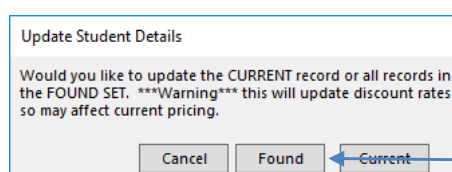
**NB:** Hold down the CONTROL key while you click the student icon to update a single record.

### 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 at a later date changed instructor, level or location information.

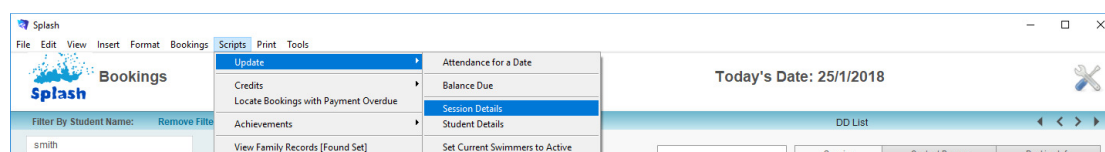
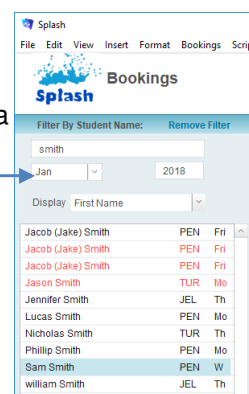
Class details can be updated for a single session or for all sessions in the found set.

### Updating Session Details for the Current Record

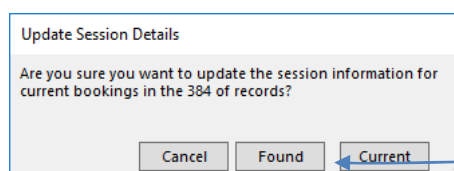
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



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**.

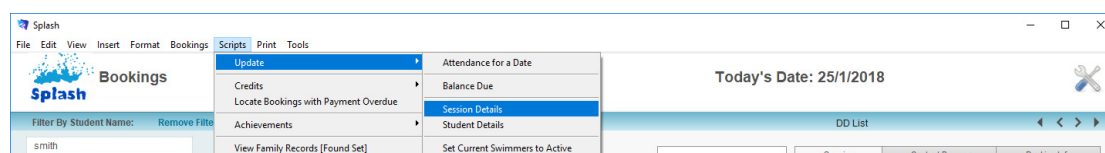


7. The Update Session Details dialog will be displayed on your screen. Click once on the **Found** button.

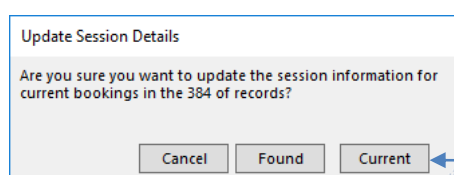


### Updating Session Details for the Found Set

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 **Current** button.





## Updating Student Achievements

Achievements (or goals) 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' software interface. On the left, there's a 'Filter By Student Name' section with a search bar containing 'smith' and a list of students including Jacob (Jake) Smith, Jason Smith, Jennifer Smith, Lucas Smith, Nicholas Smith, Phillip Smith, Sam Smith, and William Smith. The main area displays student details for Jacob (Jake) Smith, including his name, gender (Male), age (5\_6m), contact person (Barbara Smith), and telephone (0272222082). There's a photo of a child. On the right, a 'Booking Info' section shows session details like Class ID, Class Name (Penguin), Class Level (3), Student Level (3), Programme (Preschool), Instructor (To Be Advised), Location (Main Pool), Start Date (12/1/2018), End Date (26/1/2018), Start Time (10:30 AM), Weekday (Friday), Block (Jan), Year (2018), Shift (Morning), and No. of Lessons (4). Below this, there's a 'Goals' section with a table of achievements. The table has columns for Goal Status, Date Achieved, and Last Goal Achieved. The goals listed are: 1. Blowing Bubbles Eyes Under (Needs to work on...), 2. Freestyle kick with board, 3. A torpedo, and 4. 4 circle arms. At the bottom, there are buttons for 'Assessed', 'Certificate Issued', 'Rollover This Booking', and 'Rebooked Next Block'.

### Adding or Amending Achievements 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 a zoomed-in view of the 'Goals' tab from the previous image. It shows the 'Student Level' dropdown menu set to '3'. A blue arrow points to the 'Student Level' dropdown. Another blue arrow points to the 'Add Achievements' button (a green plus sign) at the bottom of the goals list. The goals list is the same as in the previous image.

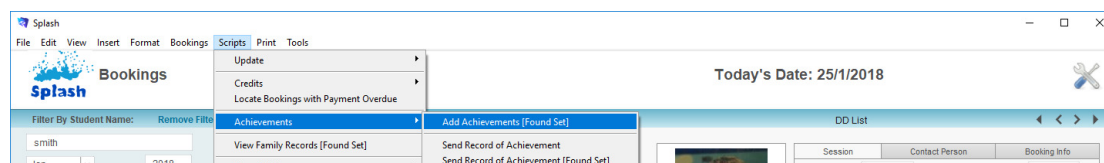
4. Click once on the **Add Achievements** button displayed in the Goals tab card.
5. The selected level goals will be displayed on your screen.

## Importing Achievements 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).

3. When the correct bookings are displayed on your screen select **Add Goals [Found Set]** from the Scripts menu.



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 Achievements

Progression towards goals can be updated in 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 Achievements tab card displayed at the base of your screen.

Splash Bookings Today's Date: 25/1/2018

Filter By Student Name: Remove Filter

smith

Jan 2018

Display First Name

Jacob (Jake) Smith	PEN	Fri
Jacob (Jake) Smith	PEN	Fri
Jacob (Jake) Smith	PEN	Fri
Jason Smith	TUR	Mo
Jennifer Smith	JEL	Th
Lucas Smith	PEN	Mo
Nicholas Smith	TUR	Th
Phillip Smith	PEN	Mo
Sam Smith	PEN	W
William Smith	JEL	Th

Student ID: 13

Name: Jacob (Jake) Smith

Gender: Male Age: 5\_6m

Medical:

Contact: Barbara Smith

Telephone: 0272222082

Comments:

Student Exited: ☐

Session: Class ID: PEN Session ID: 3484

Class Name: Penguin

Class Level: 3 Student Level: 3

Programme: Preschool

Instructor: To Be Advised

Location: Main Pool No. of Lessons: 4

Start Date: 12/1/2018 End Date: 25/1/2018

Start Time: 10:30 AM Weekday: Friday

Block: Jan Year: 2018 Shift: Morning

Makeup: No

Payments Attendance Achievements Comments

Student Level: 3

1 Blowing Bubbles Eyes Under Goal Status: Needs to work on... Date Achieved: Last Goal Achieved: ☐

2 Freestyle kick with board Goal Status: Progress / Comments Date Achieved: ☐

3 A torpedo Goal Status: Progress / Comments Date Achieved: ☐

4 4 circle arms Goal Status: Progress / Comments Date Achieved: ☐

Assessed: Certificate Issued: Rollover This Booking: Yes Rebooked Next Block: No Next Block Move to Class:

3. There are up to three fields to be updated within each goal.

Payments Attendance Achievements Comments

Student Level: 3

1 Blowing Bubbles Eyes Under Goal Status: Needs to work on... Date Achieved: Last Goal Achieved: ☐

2 Freestyle kick with board Goal Status: Progress / Comments Date Achieved: ☐

3 A torpedo Goal Status: Progress / Comments Date Achieved: ☐

4 4 circle arms Goal Status: Progress / Comments Date Achieved: ☐

Assessed: Certificate Issued: Rollover This Booking: Yes Rebooked Next Block: No Next Block Move to Class:

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 the within the date 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 a swimmer's progress.

Student Level	3				
1	Blowing Bubbles Eyes Under	Needs to work on	Goal Status	Date Achieved	Last Goal Achieved:
2	Freestyle kick with board	Progress / Comments	Goal Status	Date Achieved	
3	A torpedo	Progress / Comments	Goal Status	Date Achieved	
4	circle arms	Progress / Comments	Goal Status	Date Achieved	

Assessed:  Certificate Issued:

Rollover This Booking: Yes ☐ No ☐ Rebooked Next Block: Yes ☐ No ☐ Next Block Move to Class:

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 Date

This field is used to reflect the last date a swimmer was assessed. You should manually enter the date of any assessment. Using this field correctly will enable you to locate any student that was absent during an assessment day.

### Updating Next Block Class

This field should only be used if a child has completed all achievements and is ready to progress to the next level. After assessing a student 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 a session in the next block. When set to Yes the booking will be included in the rollover. If after assessment the swimmer needs to move to a higher level class remember to move the child after the rollover. 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. Set this field to NB if you know the student will not be rebooking for the next block Using this field correctly may make it easier to monitor student retention.

## 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 Bookings' application window. On the left is a sidebar with a 'Filter By Student Name' field and a list of students. The main area is divided into several sections: 'Student ID' and 'Name' fields, a 'Gender' and 'Age' section, a 'Medical' section, a 'Contact' section, and a 'Comments' text area. On the right, there's a 'Session' and 'Booking Info' section with fields for 'Class ID', 'Class Name', 'Class Level', 'Student Level', 'Programme', 'Instructor', 'Location', 'Start Date', 'End Date', 'Start Time', 'Weekday', 'Block', 'Year', and 'Shift'. At the bottom, there's a 'Goals' section with a table of activities and their status. A blue arrow points from the 'Print Record of Achievement' button at the bottom right of the Goals section 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. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).

The screenshot shows the 'Record of Achievement' preview window. It has a header with navigation arrows, a page count '1 Total', and buttons for 'Save as Excel', 'Save as PDF', 'Print', and 'Print Setup'. At the bottom, there's a 'Layout' dropdown, a 'View As' section, an 'Exit Preview' button, and a 'Script paused' status with 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?'. It has 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.



**YOUR SWIM SCHOOL NAME HERE**

. Wellington  
Telephone:



## Record of Achievement for Jake Smith

### Level 3 - Penguin

---

**1**    Blowing Bubbles Eyes Under

Needs to work on ....

---

**2**    Freestyle kick with board

---

**3**    A torpedo

---

**4**    4 circle arms

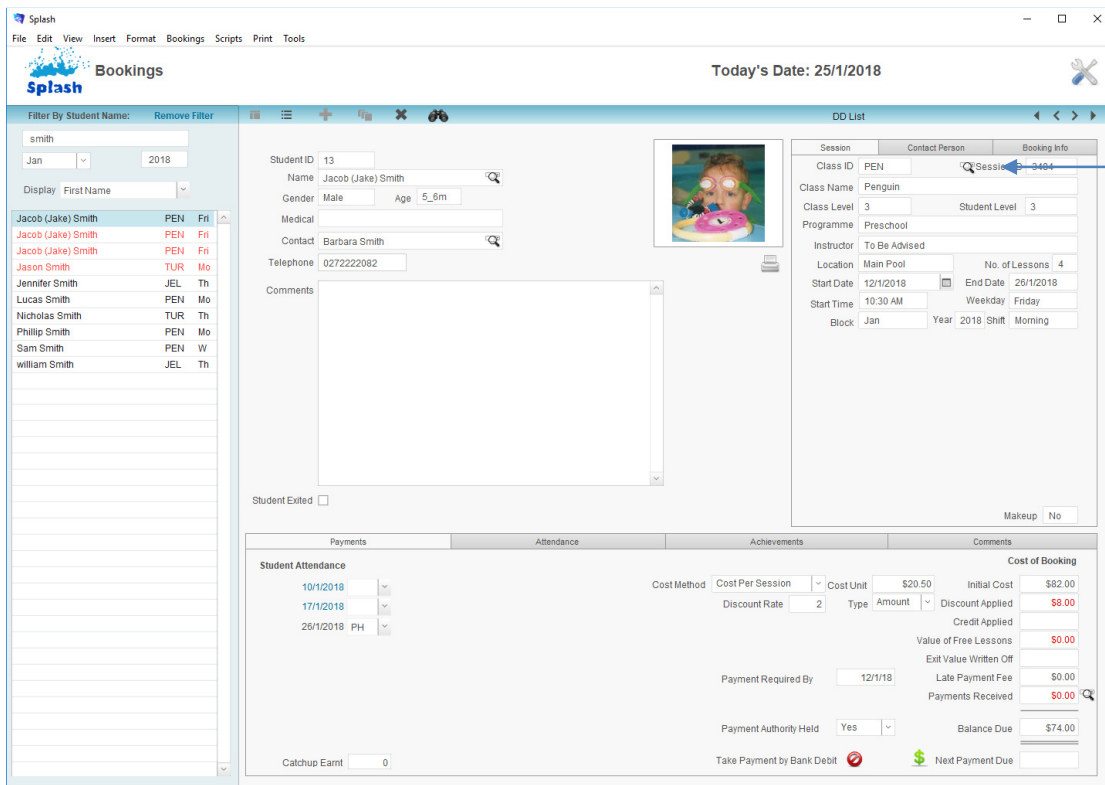
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**5**    Back Kick

---

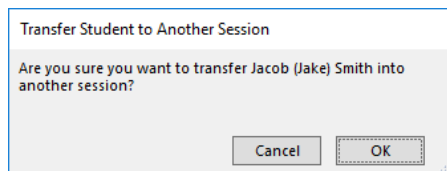
## Transferring a Student to Another Session

1. Use the **Finding a Booking** function to locate the record you wish to update

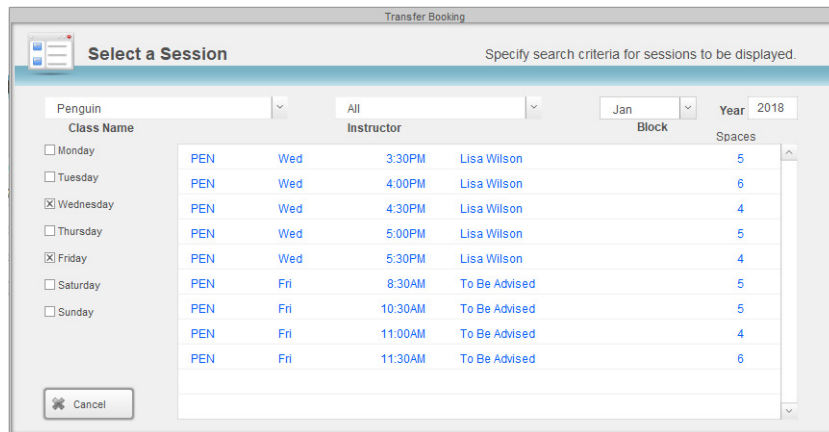


The screenshot shows the 'Bookings' window in the Splash software. The 'DD List' (Data Dictionary) is open, showing session details for Class ID PEN, Class Name Penguin, Class Level 3, and Student Level 3. A blue line points from the 'Session' tab in the 'DD List' to the 'Session' tab in the 'Bookings' window.

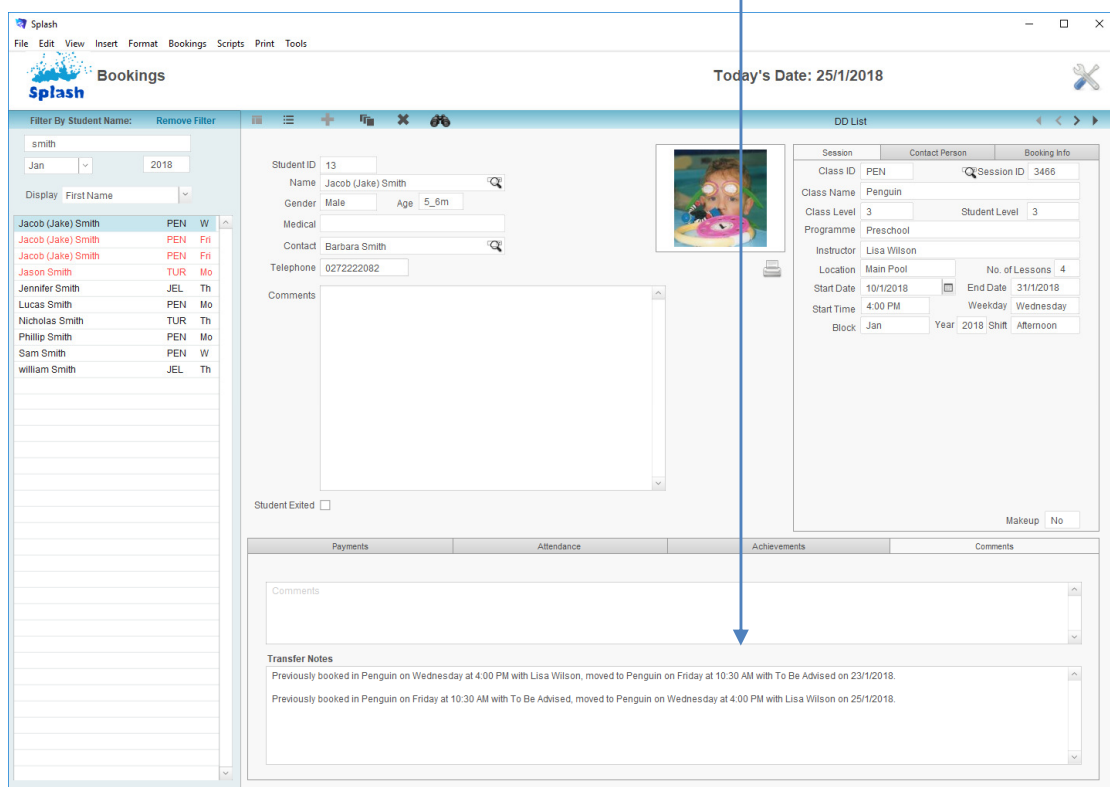
2. Hold down the **SHIFT** key on your keyboard and click once on the Session Icon.
3. You will be asked to confirm whether you wish to transfer the child to another session.



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.



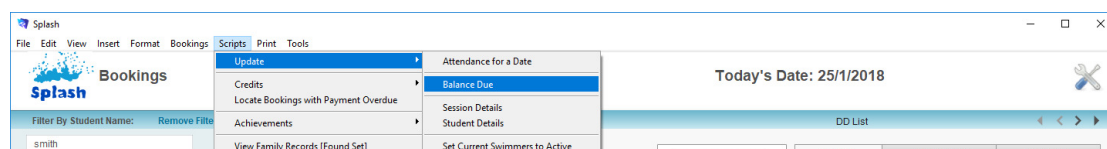
6. A list of all sessions matching the criteria you have entered will be displayed on your screen.
  7. Click once on the line, which contains the session you wish to move the student into.
- NB:** Place your cursor over the desired line (without clicking) to view a list of students currently booked into the session.
8. After clicking on the required Session you will be returned to the Booking Details screen.
  9. The transfer notes will be updated to show the session the student's previous booking information.



## 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.

1. Use the **Finding a Booking** function to locate the records you wish to reconcile.
2. Select **Update...Balance Due** from the Scripts menu.

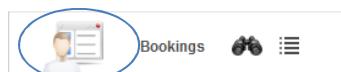


3. Splash will step through all of the records in the found set. It will calculate payments received and update the balance due on all bookings in the found set.

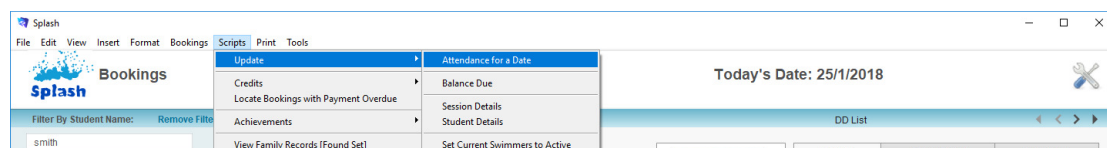
## Updating Attendance for Multiple Bookings

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.

A screenshot of the 'Locate Bookings to Update' dialog box. The dialog box has a title bar 'Locate Bookings to Update' and a message 'Please specify the details below to locate bookings to update.' Below the message are three input fields: 'Weekday' with 'Wednesday' entered, 'Term' with 'Jan' entered, and 'Year' with '2018' entered. At the bottom are 'Cancel' and 'OK' buttons.

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.



- 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.

Update Attendance

Globally update attendance for a specified date. Please specify the date and attendance type to continue.

Attendance Date

10/1/18

Attendance Value (A C NA P PH)

P

Cancel

OK

- Click OK to update the selected records.

The screenshot shows the 'Splash Bookings' application. The 'Update Attendance' dialog box is open, displaying the date '10/1/18' and the attendance value 'P'. A blue arrow points from the 'OK' button in the dialog to the 'Student Attendance' table in the background. The background interface includes a menu bar, a filter section, a student list, a student details panel, and a booking details panel.

Student Name	Class	Day
Jacob (Jake) Smith	PEN	W
Jacob (Jake) Smith	PEN	Fri
Jacob (Jake) Smith	PEN	Fri
Jason Smith	TUR	Mo
Jennifer Smith	JEL	Th
Lucas Smith	PEN	Mo
Nicholas Smith	TUR	Th
Phillip Smith	PEN	Mo
Sam Smith	PEN	W
William Smith	JEL	Th

Student ID	Name	Gender	Age	Medical	Contact	Telephone
13	Jacob (Jake) Smith	Male	5_6m		Barbara Smith	0272222082

Session	Contact Person	Booking Info
Class ID: PEN	Class Name: Penguin	Session ID: 3486
Class Level: 3	Programme: Preschool	Student Level: 3
Instructor: Lisa Wilson	Location: Main Pool	No. of Lessons: 4
Start Date: 10/1/2018	End Date: 31/1/2018	
Start Time: 4:00 PM	Weekday: Wednesday	
Block: Jan	Year: 2018	Shift: Afternoon

Student Attendance	Catchup Earn
10/1/2018 P	0
17/1/2018	
24/1/2018 PH	
31/1/2018	

- 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 will release the space so another student can be booked into the 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.

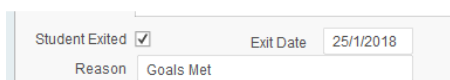
1. Use the **Finding a Booking** function to locate the record you wish to update.
2. Click on the **Student Exited** field to display the exit dialog for the required student.

The screenshot shows the 'Splash Bookings' software interface. On the left, there's a 'Filter By Student Name' section with a search bar containing 'smith' and a list of students including Jacob (Jake) Smith, Jennifer Smith, Lucas Smith, Nicholas Smith, Phillip Smith, Sam Smith, and William Smith. The main area displays the details for Jacob (Jake) Smith, including his name, gender (Male), age (5\_6m), contact information, and a photo. A 'Student Exited' checkbox is visible. Overlaid on this is the 'Exit Booking' dialog box, which has a title bar 'Exit Booking' and a subtitle 'Enter Exit Reason'. It contains fields for 'Name' (Jacob (Jake) Smith), 'Reason for Exit' (a dropdown menu), and 'Exit Date' (a date picker). There are 'Cancel' and 'Done' buttons at the bottom of the dialog. The background shows various booking details like 'Class ID', 'Class Name', 'Class Level', 'Programme', 'Instructor', 'Location', 'Start Date', 'End Date', 'Start Time', 'Block', 'No. of Lessons', 'Weekday', 'Year', 'Shift', 'Makeup', 'Cost of Booking', 'Discount Rate', 'Type', 'Amount', 'Credit Applied', 'Value of Free Lessons', 'Exit Value Written Off', 'Late Payment Fee', 'Payments Received', 'Balance Due', 'Payment Required By', 'Payment Authority Held', 'Take Payment by Bank Debit', and 'Next Payment Due'.

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 reasons: Family Relocating, Financial, Goals Met (highlighted in blue), Health Reasons, Injury, Loss of Interest, Other, Other Aquatic Activities, Other Commitments, Progression to Squad, Reducing Lessons, Service, Starting School, Taking a Break, and Weather. The 'Exit Date' field is also visible, showing a date picker.

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.



A screenshot of a form titled 'Student Exit'. It contains a checkbox labeled 'Student Exited' which is checked. To its right is a date field labeled 'Exit Date' with the value '25/1/2018'. Below these is a text field labeled 'Reason' with the value 'Goals Met'.

**NB:** An additional dialog box will be displayed during the exit process if money is still due on the selected booking.

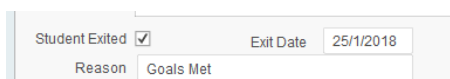
**NB:** An exited booking is not included in the rollover; the rollover booking field will be set to No.

**NB:** Exited bookings will remain on the student's 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.

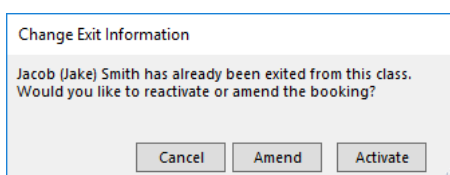
### **Reactivating an Exited Booking**

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.



A screenshot of a form titled 'Student Exit'. It contains a checkbox labeled 'Student Exited' which is checked. To its right is a date field labeled 'Exit Date' with the value '25/1/2018'. Below these is a text field labeled 'Reason' with the value 'Goals Met'.

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.



A screenshot of a dialog box titled 'Change Exit Information'. The text inside reads: 'Jacob (Jake) Smith has already been exited from this class. Would you like to reactivate or amend the booking?'. At the bottom are three buttons: 'Cancel', 'Amend', and 'Activate'.

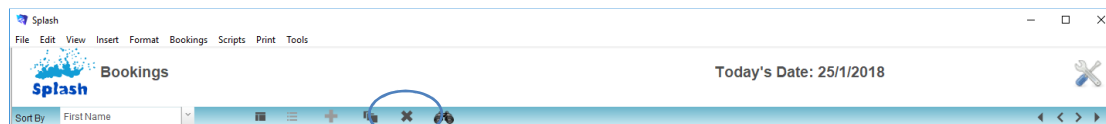
**NB:** Any funds written off during the exit process will be reapplied to the booking. The rollover booking field will be reset to match the student default.

## Deleting a Booking Record

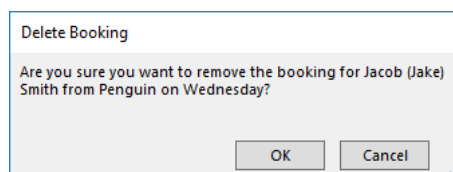
Booking records can be deleted from the Booking details screen, the Booking list view or the diary.

### Deleting a Booking from List View

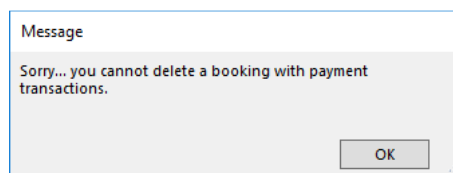
1. Ensure the appropriate Booking record is displayed within the list on your screen.



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.

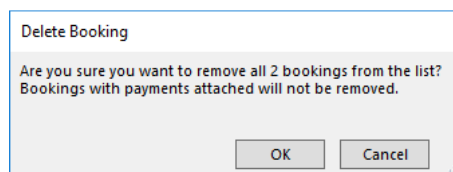


**NB:** You cannot delete a booking which has received payments.

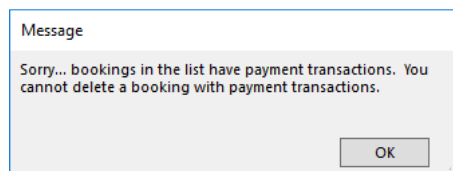


### Deleting a Group of Bookings

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.

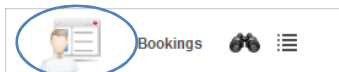


## Defining Current Term Swimmers as Active

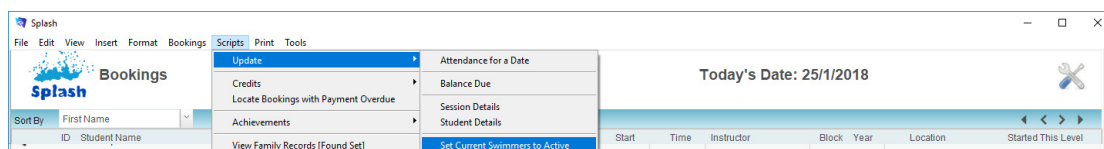
All student and family files can be defined as either active or inactive. During normal operation Splash will attempt to maintain the status of each record and will automatically set the status to Active whenever a booking is made. Splash however has difficulty changing the status of a record to inactive in some situations.

Use this command to update the status of all student and family files for anyone booked in a specified term/block.

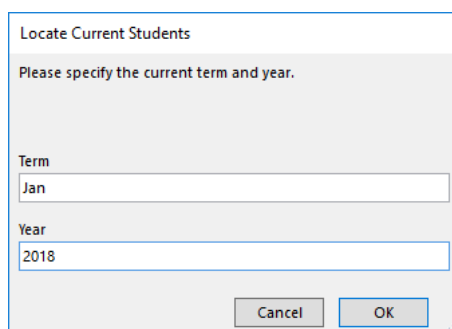
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



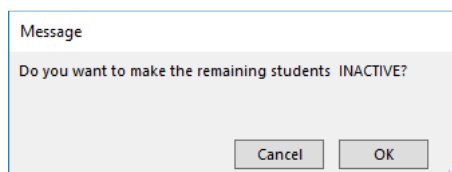
3. Select **Update...Set Current Term Swimmers to Active** from the Scripts menu.



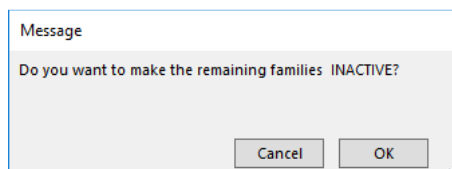
4. The **Locate Current Students** dialog will be displayed on your screen.
5. Enter the current Term and Year and click OK. Students with a booking in the selected term and year will be set to active.

A screenshot of the 'Locate Current Students' dialog box. It contains the text 'Please specify the current term and year.' Below this are two input fields: 'Term' with 'Jan' entered and 'Year' with '2018' entered. At the bottom 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. It contains the text 'Do you want to make the remaining students INACTIVE?'. At the bottom 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.

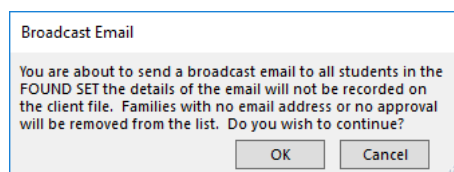
A screenshot of a 'Message' dialog box. It contains the text 'Do you want to make the remaining families INACTIVE?'. At the bottom are 'Cancel' and 'OK' buttons.

## Sending a Broadcast Email

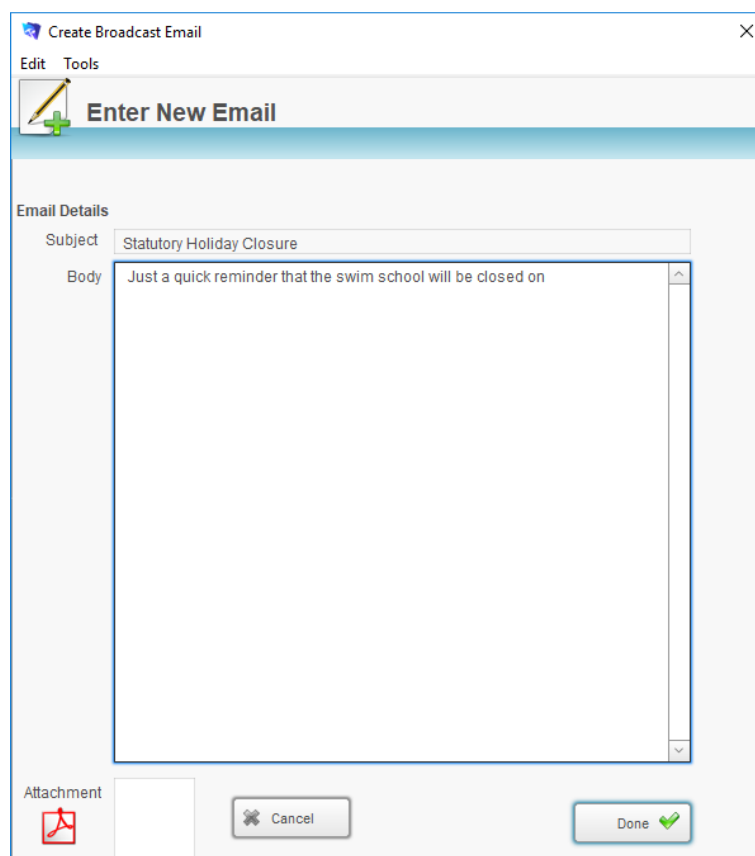
A broadcast email is a single email sent to multiple addresses. An email sent in this way will not be recorded on the family file.

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.



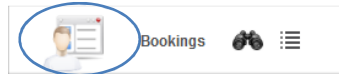
6. Enter the message you wish to send and attach a document if required.
7. Click the **Done** button.
8. The message will be sent as soon as you click Done.

**NB:** You can view the messages that have been sent by looking in the Sent Items folder of your email application.

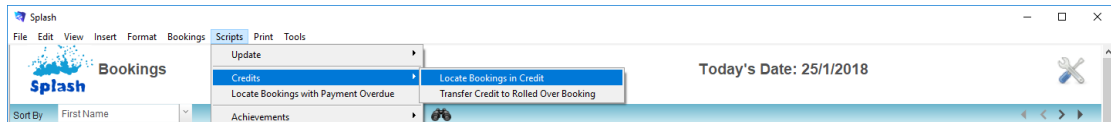
## Locate Bookings in Credit

Use this command to find any bookings that have been over paid. Credits can then be applied to another booking if they are located.

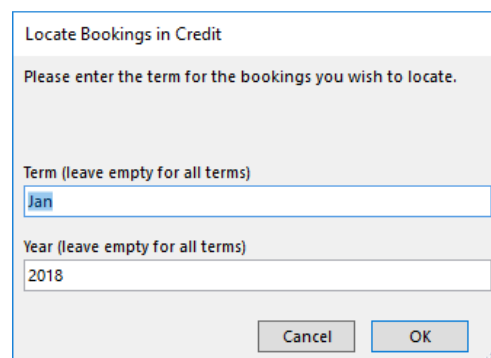
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



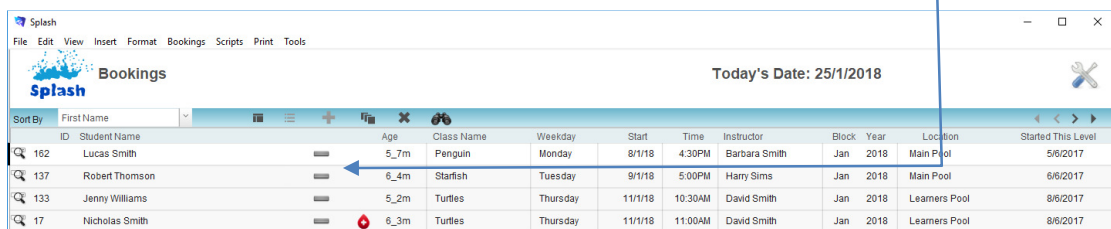
3. Select **Credits...Locate Bookings in Credit** from the Scripts menu.



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.



ID	Student Name	Age	Class Name	Weekday	Start	Time	Instructor	Block	Year	Location	Started This Level
162	Lucas Smith	5_7m	Penguin	Monday	8/1/18	4:30PM	Barbara Smith	Jan	2018	Main Pool	5/6/2017
137	Robert Thomson	6_4m	Starfish	Tuesday	9/1/18	5:00PM	Harry Sims	Jan	2018	Main Pool	6/6/2017
133	Jenny Williams	5_2m	Turtles	Thursday	11/1/18	10:30AM	David Smith	Jan	2018	Learners Pool	8/6/2017
17	Nicholas Smith	6_3m	Turtles	Thursday	11/1/18	11:00AM	David Smith	Jan	2018	Learners Pool	8/6/2017

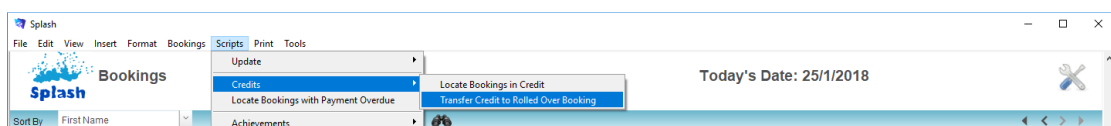
## Transfer Credits to Rolled Over Bookings

Use this command to find any bookings that have been over paid. Credits can then be applied to another booking if they are located.

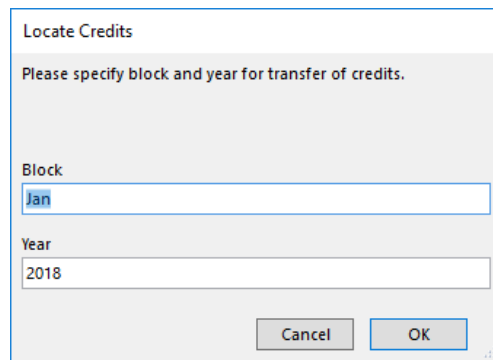
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



3. Select **Credits... Transfer Credit to Rolled Over Booking** from the Scripts menu.



4. The Locate Bookings in Credit dialog will be displayed on your screen.



Locate Credits

Please specify block and year for transfer of credits.

Block

Jan

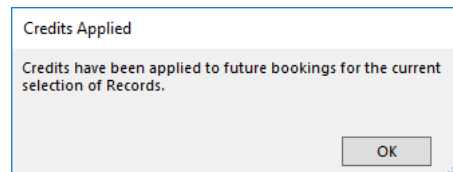
Year

2018

Cancel OK

This dialog box is titled "Locate Credits". It contains a message "Please specify block and year for transfer of credits." Below the message are two input fields: "Block" and "Year". The "Block" field contains the text "Jan" and the "Year" field contains the text "2018". At the bottom right of the dialog are two buttons: "Cancel" and "OK".

5. Enter the required term and year and click OK.
6. Splash will locate all bookings in credit and move the funds to the swimmers next booking.



Credits Applied

Credits have been applied to future bookings for the current selection of Records.

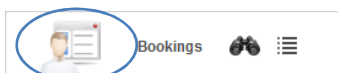
OK

This dialog box is titled "Credits Applied". It contains a message "Credits have been applied to future bookings for the current selection of Records." At the bottom right of the dialog is a single button: "OK".

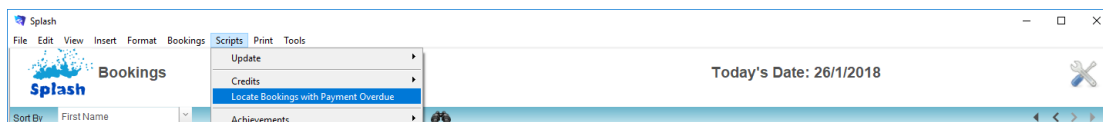


## Locate Bookings with Payment Overdue

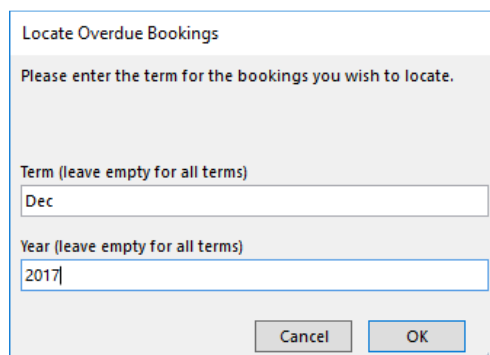
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



3. Select **Locate Bookings with Payment Overdue** from the Scripts menu.



4. The Locate Overdue Bookings dialog will be displayed on your screen.

A screenshot of the 'Locate Overdue Bookings' dialog box. It contains two text input fields: 'Term (leave empty for all terms)' with 'Dec' entered, and 'Year (leave empty for all terms)' with '2017' entered. There are 'Cancel' and 'OK' buttons at the bottom right.

Locate Overdue Bookings

Please enter the term for the bookings you wish to locate.

Term (leave empty for all terms)

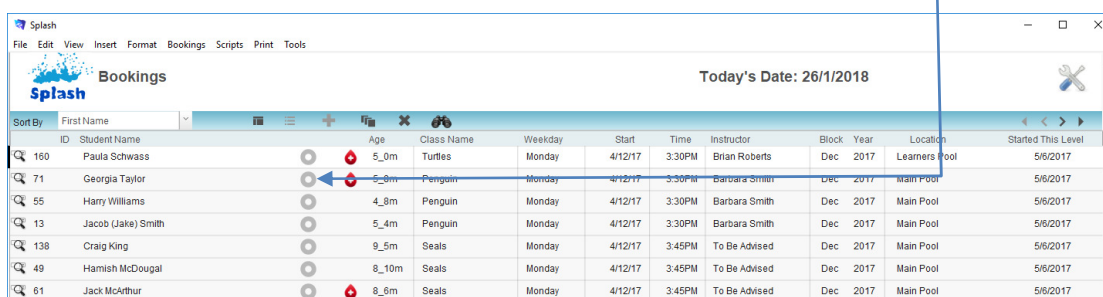
Dec

Year (leave empty for all terms)

2017

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.

A screenshot of the Splash software interface showing a list of unpaid bookings. The 'Bookings' menu is open, and the 'Locate Bookings with Payment Overdue' option is selected. The list shows columns for ID, Student Name, Age, Class Name, Weekday, Start, Time, Instructor, Block, Year, Location, and Started This Level. A blue line highlights the row for Paula Schwass.

ID	Student Name	Age	Class Name	Weekday	Start	Time	Instructor	Block	Year	Location	Started This Level
160	Paula Schwass	5_0m	Turtles	Monday	4/12/17	3:30PM	Brian Roberts	Dec	2017	Learners Pool	5/6/2017
71	Georgla Taylor	5_8m	Penguin	Monday	4/12/17	3:30PM	Barbara Smith	Dec	2017	Main Pool	5/6/2017
55	Harry Williams	4_8m	Penguin	Monday	4/12/17	3:30PM	Barbara Smith	Dec	2017	Main Pool	5/6/2017
13	Jacob (Jake) Smith	5_4m	Penguin	Monday	4/12/17	3:30PM	Barbara Smith	Dec	2017	Main Pool	5/6/2017
138	Craig King	9_5m	Seals	Monday	4/12/17	3:45PM	To Be Advised	Dec	2017	Main Pool	5/6/2017
49	Hamish McDougal	8_10m	Seals	Monday	4/12/17	3:45PM	To Be Advised	Dec	2017	Main Pool	5/6/2017
61	Jack McArthur	8_6m	Seals	Monday	4/12/17	3:45PM	To Be Advised	Dec	2017	Main Pool	5/6/2017

**NB:** You can now use this list to send reminder notices via email or sms.

## Sending SMS Messages from Bookings

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.

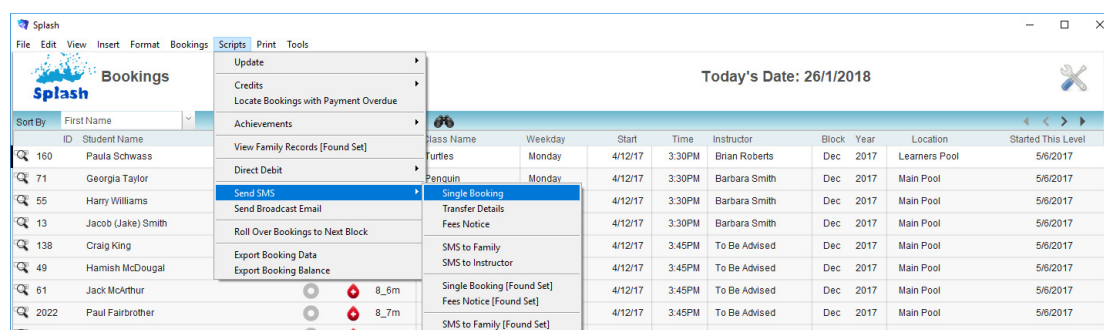
**All of the Send SMS commands described below are available on either the Print or the Scripts menu.**

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 for.
3. Select **Send SMS** from the Scripts menu. Choose **Single Booking** from the pop-out menu displayed.

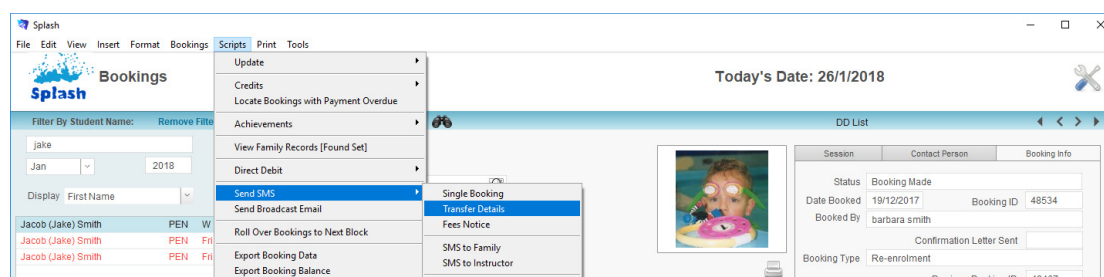


4. The Booking SMS will be generated and sent, a copy will be placed on the clients file.

### *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 Scripts menu. Choose **Transfer Details** from the pop-out menu displayed.



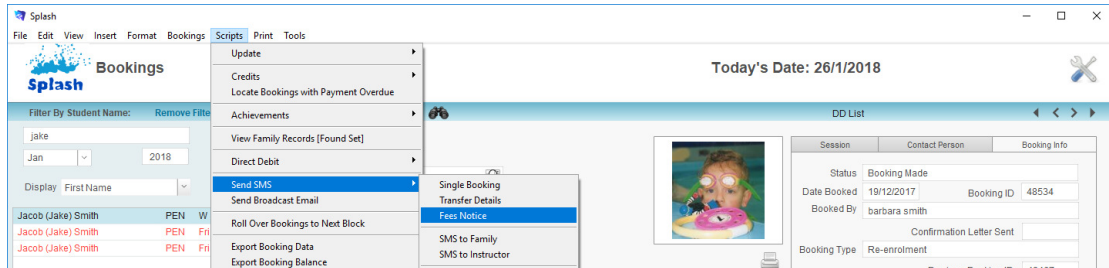
3. The Transfer SMS will be generated and sent, a copy will be placed on the clients file.

### *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 the reminder for.

2. Select **Send SMS** from the Scripts menu. Choose **Fees Notice** from the pop-out menu displayed.

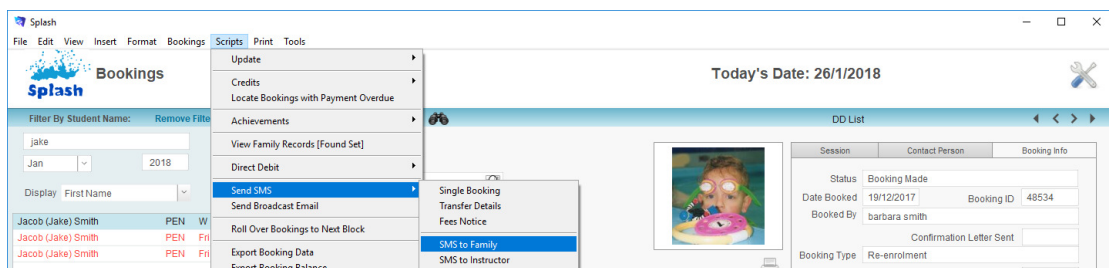


3. The Fee Notice SMS will be generated and sent, a copy will be placed on the clients file.

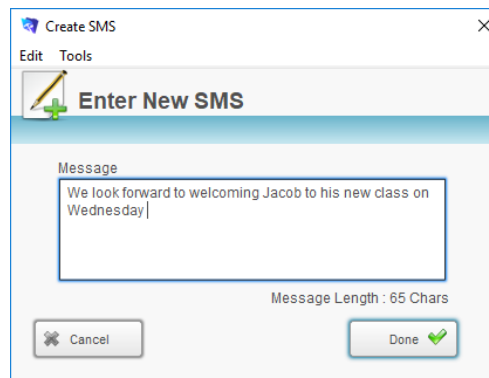
### ***Sending a SMS to the Family (from Menu)***

Use this command to send a personal 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 Scripts menu. Choose **SMS to Family** from the pop-out menu displayed.



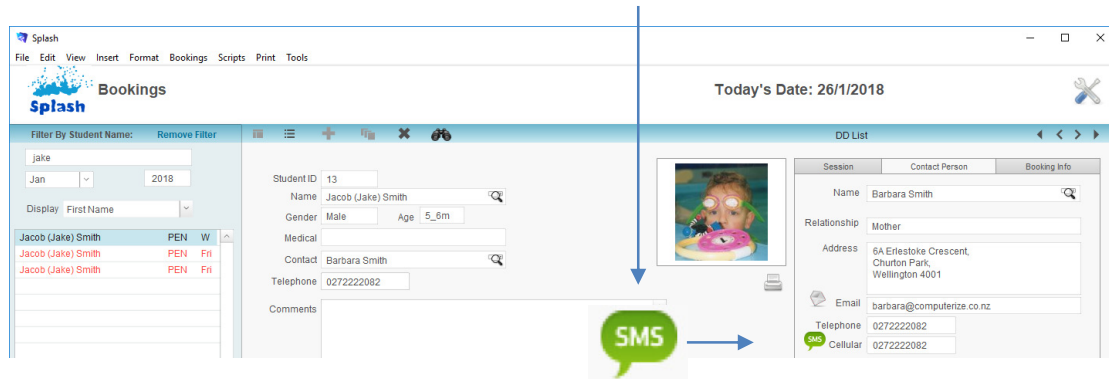
3. The **Enter New SMS** dialog will be displayed on your screen.



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)***

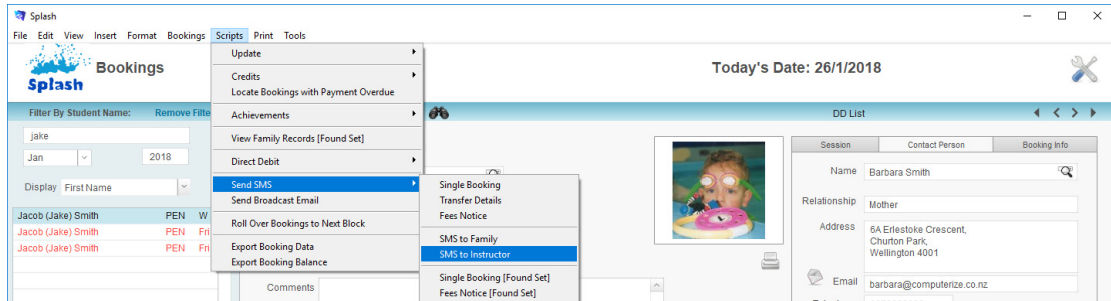
An alternative to sending a SMS to the family as described above is to initiate the message from a desktop icon rather than a menu. Simply locate a booking for the required family and click once on the Contact person tab card. Then simply click once on the SMS button displayed to the left of the Primary Contact cellular number.



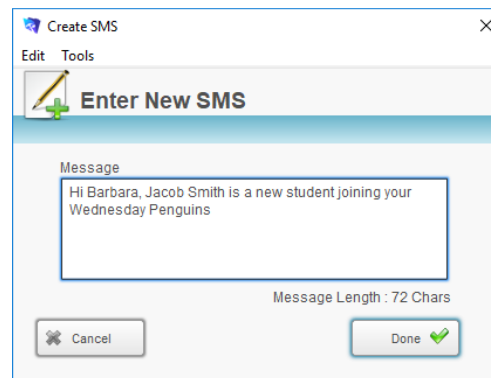
### ***Sending a SMS to the Instructor (from Menu)***

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 Scripts menu. Choose **SMS to Instructor** from the pop-out menu displayed.



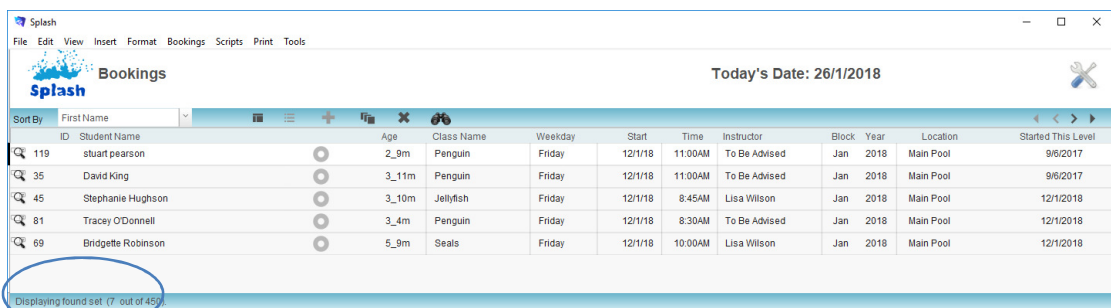
3. The **Enter New SMS** dialog will be displayed on your screen.



4. Enter the message you wish to send.
5. Click the **Done** button to send your message and return to the booking screen.

### ***Sending SMS Messages for the Found Set of 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.**

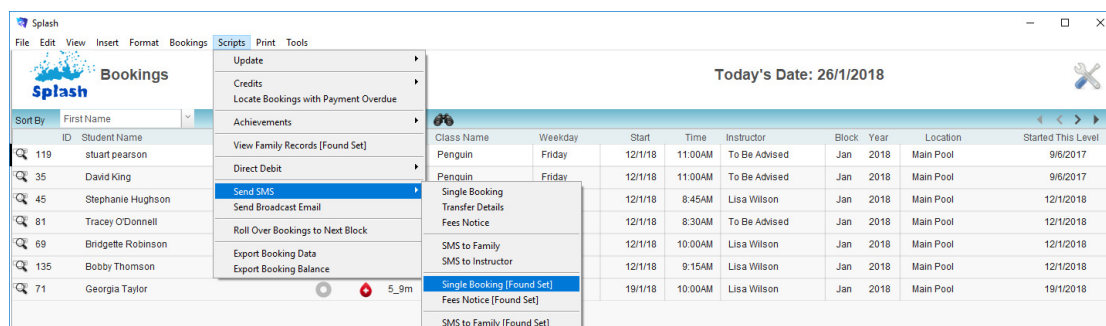
This command will only be successful if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

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 Scripts menu. Choose **Single Booking [Found Set]** from the pop-out menu displayed.

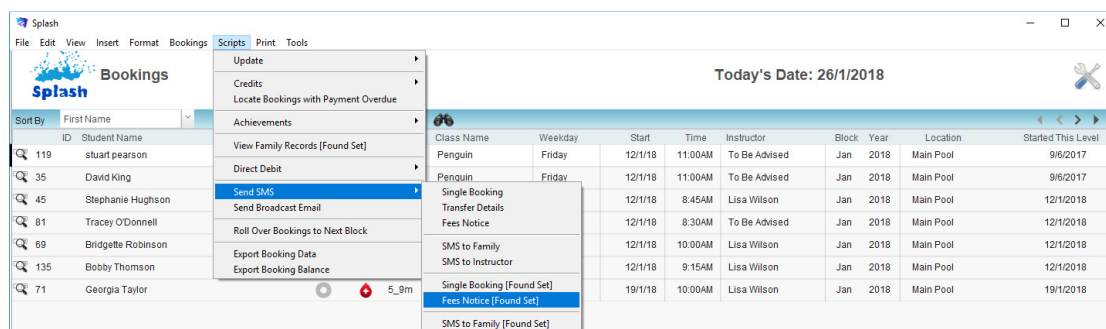


4. Each Booking SMS messages will be generated and sent, a copy will be placed on the clients file.

### *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 Scripts menu. Choose **Fees Notice [Found Set]** from the pop-out menu displayed.

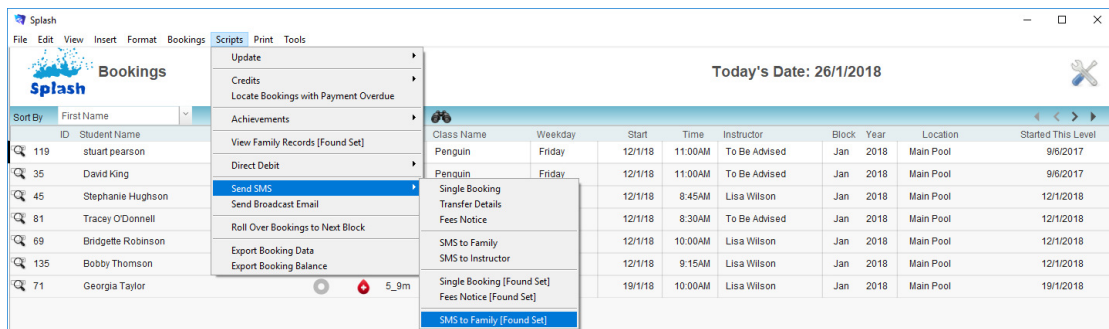


3. The Fee Notice SMS will be generated and sent, a copy will be placed on the clients file.

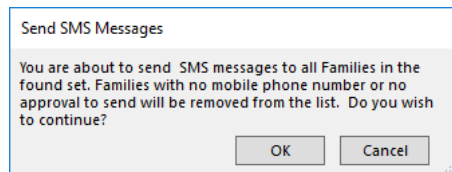
### *Sending a SMS to the Family (from Menu)*

Use this command to send a single SMS message to each families within the found set of bookings.

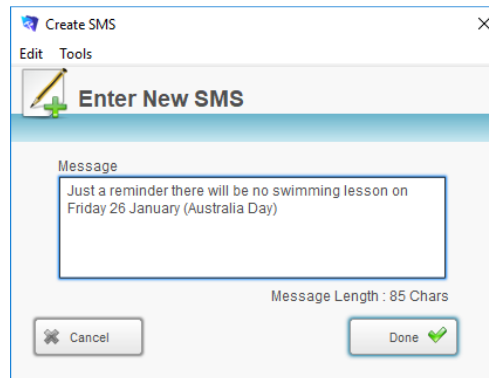
1. Follow step 1 described above to locate bookings for the required families.
2. Select **Send SMS** from the Scripts menu. Choose **SMS to Family [Found Set]** from the pop-out menu displayed.



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.



## Copying Bookings to the Next Block (Rollover)

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).

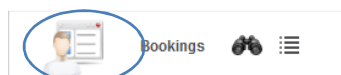
The screenshot shows the 'Bookings' module in the Splash application. On the left, a list of students is filtered by 'jake' and '2018'. The main area displays details for 'Jacob (Jake) Smith', including his name, gender, age, contact information, and a photo. On the right, the 'Session' details are shown for 'Penguin' class, 'Main Pool', starting on 10/1/2018. At the bottom, the 'Rollover This Booking' field is set to 'Yes', and the 'Next Block Move to Class' field is also set to 'Yes'. A blue arrow points from the text 'Bookings will only be transferred if Rollover Booking in the booking record is set to Yes' to the 'Rollover This Booking' field.

Bookings will only be transferred 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

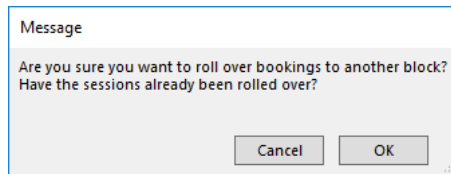


3. Go to the **Scripts** menu to select **Rollover Bookings to Next Block**.

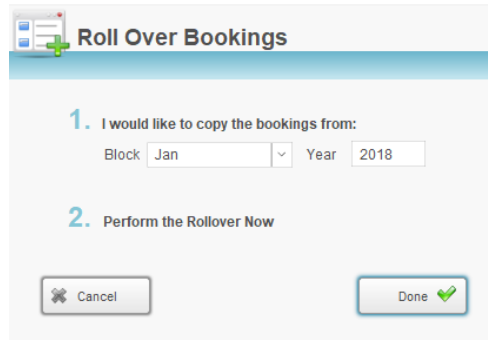
The screenshot shows the 'Scripts' menu in the Splash application. The 'Rollover Bookings to Next Block' option is highlighted in blue. The background shows a list of bookings for the 'Penguin' class, including details like student name, start time, and instructor.

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.

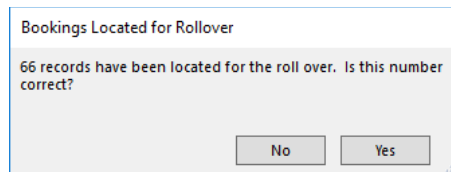




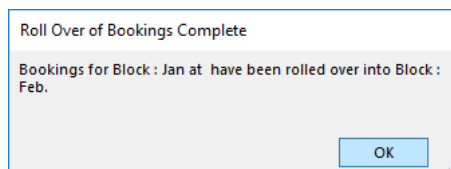
5. Click OK if the sessions have been created, or Cancel to exit the rollover process.
6. If you clicked OK (above) the **Rollover Bookings** dialog box will be displayed on your screen.
7. You are now required to define the term/block and year of the bookings you want to be copied. Click once in the 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.



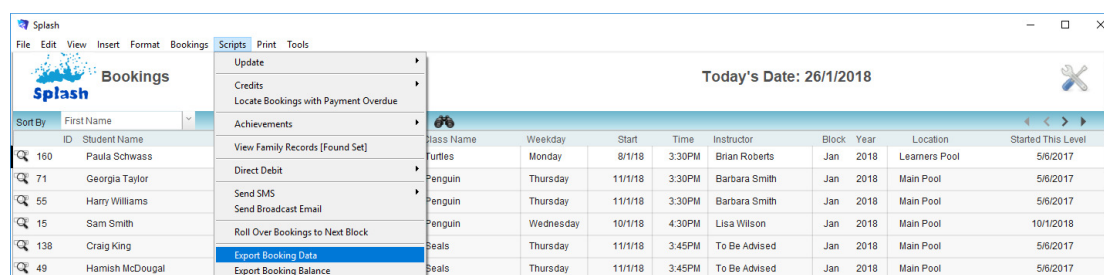
**NB:** After completing the rollover use the transfer a booking button to move any students who need to change class time or level. When all amendments have been made simply email a confirmation letter to each family.

## Exporting Booking Data

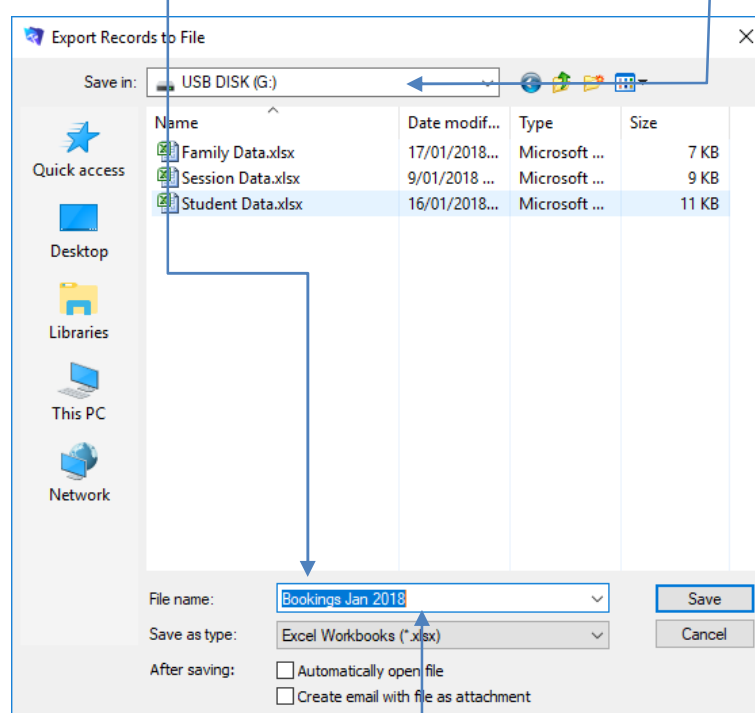
You can export Splash data to a new file and then open it in another application. For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

### Exporting Records to Excel

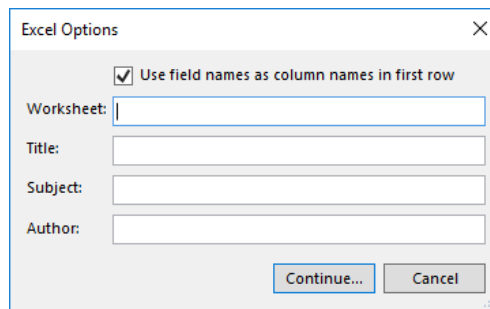
1. Use the **Finding a Booking** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Booking Data** from the **Scripts** menu.



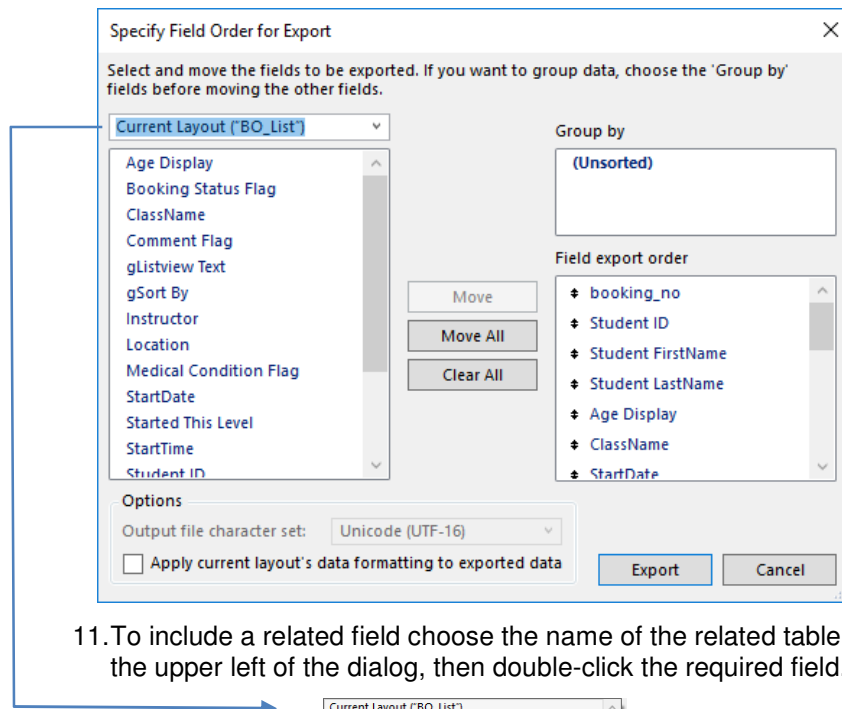
4. The **Export Records to File** dialog will be displayed on your screen.
5. Enter the name you wish to call your file and choose a location to store the file.



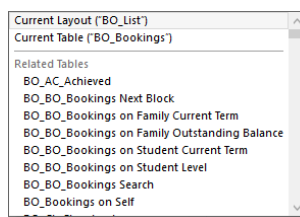
6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



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.

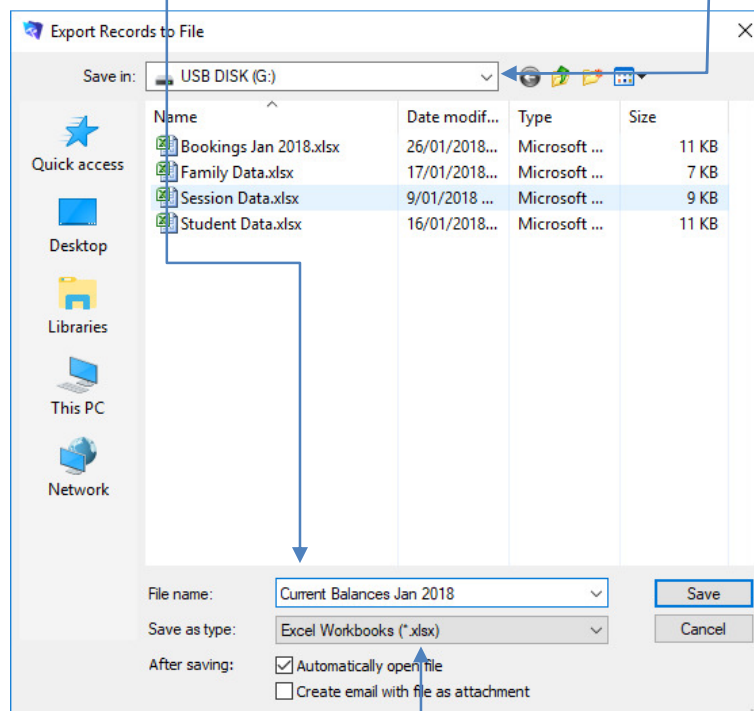


12. When all the required fields are displayed in the Field Export Order list click the **Export** button.
13. The Excel file will be saved to your computer ready for use.

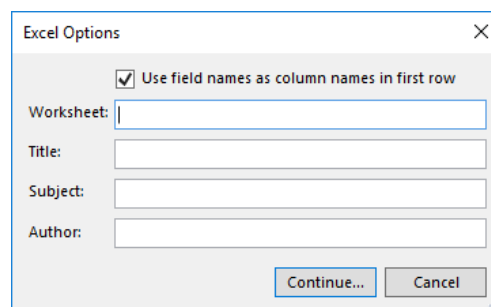
	A	B	C	D	E	F	G	H	I	J	K
	booking_no	Student ID	Student FirstName	Student LastName	Age Display	ClassName	StartDate	StartTime	Term	Year	Instructor
2	48508	160 Paula	Schwass	5_1m	Turtles	08/01/2018	15:30:00 Jan			2018	Brian Roberts
3	48509	71 Georgia	Taylor	5_9m	Penguin	11/01/2018	15:30:00 Jan			2018	Barbara Smith
4	48510	55 Harry	Williams	4_9m	Penguin	11/01/2018	15:30:00 Jan			2018	Barbara Smith
5	48511	15 Sam	Smith	6_3m	Penguin	10/01/2018	16:30:00 Jan			2018	Lisa Wilson
6	48512	138 Craig	King	9_0m	Seals	11/01/2018	15:45:00 Jan			2018	To Be Advised
7	48513	49 Hannah	McDougal	8_11m	Seals	11/01/2018	15:45:00 Jan			2018	To Be Advised
8	48514	61 Jack	McArthur	8_7m	Seals	11/01/2018	15:45:00 Jan			2018	To Be Advised
9	48515	2022 Paul	Fairbrother	8_8m	Seals	11/01/2018	15:45:00 Jan			2018	To Be Advised
10	48516	164 Billy	Jones	5_8m	Turtles	08/01/2018	16:00:00 Jan			2018	Brian Roberts
11	48517	166 William	Smith	7_11m	Jellyfish	11/01/2018	16:00:00 Jan			2018	David Smith
12	48518	158 Simon	thomas	8_0m	Jellyfish	11/01/2018	16:00:00 Jan			2018	David Smith

### Export Bookings with the Account Balance

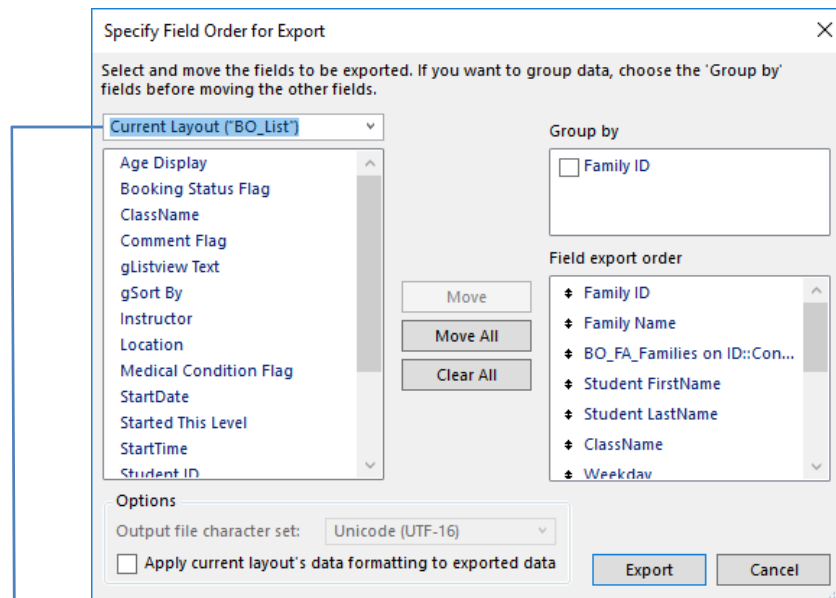
1. Use the **Finding a Booking** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Booking Data** from the **Scripts** menu.
4. The **Export Records to File**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



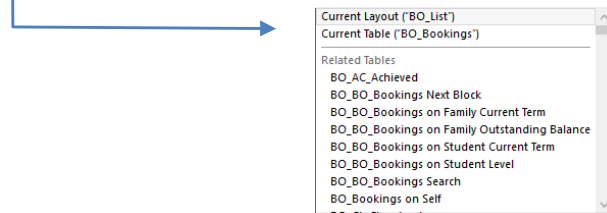
6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



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.

Current Balances Jan 2018.xlsx - Microsoft Excel non-commercial use

	A	B	C	D	E	F	G	H	I	J	K
	Family ID	Family Name	Families on ID::Contact Full	Student FirstName	Student LastName	ClassName	Weekday	StartTime	Booking Status	BO_FA_Families on ID::Email A_Families on ID::Teleph	
1	Watkins	Barbara Smith	Sam	Jamie	Jellyfish	Monday	16:30:00	Booking Made	barbara@computerize.co.nz	063724713	
2	2 Smith	Barbara Smith	Lucas	Smith	Penguin	Monday	16:30:00	Paid in Full	barbara@computerize.co.nz	063724713	
3	2 Smith	Barbara Smith	Jacob	Smith	Penguin	Wednesday	16:00:00	Booking Made	barbara@computerize.co.nz	063724713	
4	2 Smith	Barbara Smith	Nicholas	Smith	Turtles	Thursday	11:00:00	Paid in Full	barbara@computerize.co.nz	063724713	
5	9 Smith	Daniel Smith	Phillip	Smith	Penguin	Monday	16:00:00	Booking Made	computerize@xtra.co.nz	04 987 6501	
6	9 Smith	Daniel Smith	Jennifer	Smith	Jellyfish	Thursday	11:00:00	Booking Made	computerize@xtra.co.nz	04 987 6501	
7	10 Brown	Sam Brown	Amanda	Brown	Penguin	Sunday	15:30:00	Booking Made	computerize@xtra.co.nz	04 564 5212	
8	11 Anderson	David Anderson	Sally	Anderson	Shrimps	Thursday	10:00:00	Booking Made	computerize@xtra.co.nz	09 897 9845	
9	11 Anderson	David Anderson	Jamie	Anderson	Jellyfish	Monday	17:00:00	Booking Made	computerize@xtra.co.nz	09 897 9845	
10	14 Zimmerman	Andy Zimmerman	Zac	Zimmerman	Seals	Monday	17:15:00	Booking Made	computerize@xtra.co.nz	09 765 1445	
11	15 Thomson	Anthony Thomson	Robert	Thomson	Starfish	Tuesday	17:00:00	Paid in Full	computerize@xtra.co.nz	04 567 8576	
12	15 Thomson	Anthony Thomson	Caroline	Thomson	Shrimps	Thursday	09:30:00	Booking Made	computerize@xtra.co.nz	04 567 8576	


## Generating Booking Letters

The following set of letters are generated within the Bookings module using your predefined 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 **Booking Confirmation...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 SWIM SCHOOL NAME HERE**  
Wellington  
Telephone:



**BOOKING CONFIRMATION**  
  
28 January 2018

Barbara Smith  
6A Erlestoke Crescent  
Churton Park  
WELLINGTON 4001

Thank you for booking Jacob Smith into Learn To Swim at Your Swim School Name Here.

Jacob is booked into the following class;

Class: Penguin  
Start Time: 4:00 PM  
Start Date: 10/01/2018  
Instructor: Lisa Wilson

If this booking is incorrect please contact us on so we can amend our records.

The balance of fees due for Jacob (Jake) Smith is: \$74.00. 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 Swim School Name Here

**NB:** Select **Single Booking [Found Set]** to print confirmation letters for all records currently showing in list view.

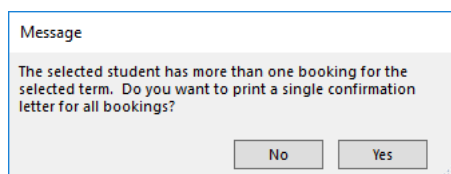
**NB:** If the selected student has an email address recorded the following dialog box will be displayed.

Message

Would you like to print or email the booking confirmation?

### Printing a Confirmation Letter for a Student with Multiple Bookings

1. Locate the student you wish to print a confirmation letter for.
2. Select **Booking Confirmation... Student With Multiple Bookings** 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 SWIM SCHOOL NAME HERE**  
Wellington  
Telephone:

**BOOKING CONFIRMATION**

Martha Taylor  
79 Main St  
Tawa  
WELLINGTON 4010

26 January 2018

Thank you for booking Georgia Taylor into Learn To Swim at Your Swim School Name Here.

Georgia's bookings are as follows:

Class: Turtles with Brian Roberts starting on Wednesday 10 January 2018 at 9:00 AM

Class: Penguin with Barbara Smith starting on Thursday 11 January 2018 at 3:30 PM

Class: Seals with Lisa Wilson starting on Friday 19 January 2018 at 10:00 AM

The balance of fees due for Georgia are: \$144.00. Cash, cheque and eftpos payments are accepted and full payment is due by the second week of the term.

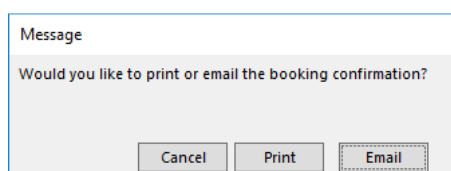
Thank you for swimming with us.

Kind regards

Learn To Swim Coordinator  
Your Swim School Name Here

**NB:** Select **Students With Multi Bookings [Found Set]** to print confirmation letters for all records currently displayed in 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 **Booking Confirmation...Family With Multiple Bookings** 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 SWIM SCHOOL NAME HERE**  
Wellington  
Telephone:

**BOOKING CONFIRMATION**

26 January 2018

Barbara Smith  
6A Erlestoke Crescent  
Churton Park  
WELLINGTON 4001

Thank you for your booking with Your Swim School Name Here.

Your family members have been scheduled to attend the following lessons:

Lucas is booked in Penguin with Barbara Smith starting on Monday 8 January 2018 at 4:30 PM

Sam is booked in Penguin with Lisa Wilson starting on Wednesday 10 January 2018 at 4:30 PM

Jacob is booked in Penguin with Lisa Wilson starting on Wednesday 10 January 2018 at 4:00 PM

Nicholas is booked in Turtles with David Smith starting on Thursday 11 January 2018 at 11:00 AM


If these lessons are incorrect or you need to change your lesson time please call .

The balance owing on your family account is \$129.35 (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 Swim School Name Here



**NB:** Select **Families With Multi Bookings (Found Set)** to print confirmation letters for all bookings currently in list view.

**NB:** If the selected student has an email address recorded the following dialog box will be displayed.

Message

Would you like to print or email the booking confirmation?




### 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 SWIM SCHOOL NAME HERE**  
Wellington  
Telephone:

**REMINDER NOTICE**



26 January 2018

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 4/12/2017.  
There is currently an outstanding amount of \$55.35.

Thank you for swimming with us.

Kind regards

Learn To Swim Coordinator  
Your Swim School Name Here

**NB:** If the selected student has an email address recorded the following dialog box will be displayed.

Message

Would you like to print or email the reminder notice?

**NB:** Select **Payment Reminder... Gentle Reminder (Found Set)** to print reminder notices for all records currently displayed in the list view.

Invalid Request

There are no fees outstanding on the selected booking. A reminder has not been created.

### 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 SWIM SCHOOL NAME HERE

, Wellington  
Telephone:

### REMINDER NOTICE



26 January 2018

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 \$55.35 which was due for payment on 4/12/2017.

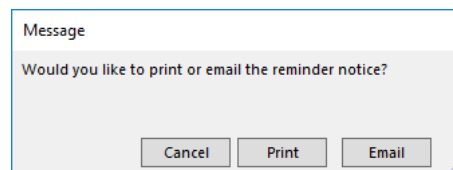
If you wish to continue swimming please forward payment or contact our office on to discuss payment options.

Thank you for swimming with us.

Kind regards

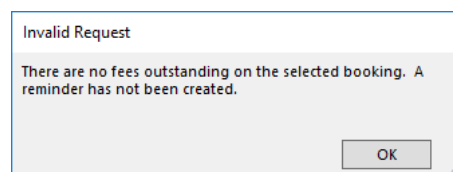
Learn To Swim Coordinator  
Your Swim School Name Here

**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 SWIM SCHOOL NAME HERE**  
Wellington  
Telephone:



**CONFIRMATION OF TRANSFER**

26 January 2018

Barbara Smith  
6A Erlestoke Crescent  
Churton Park  
WELLINGTON 4001

Thank you for booking Jacob Smith into Learn To Swim at Your Swim School Name Here.

Jacob has been transferred into the following class;

Class: Penguin  
Start Time: 4:00 PM  
Weekday: Wednesday  
Instructor: Lisa Wilson

If this booking is incorrect please contact us on so we can amend our records.

The balance of fees due for Jacob (Jake) Smith is: \$74.00. 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 Swim School Name Here

**NB:** If the selected student has an email address recorded the following dialog box will be displayed.

Message

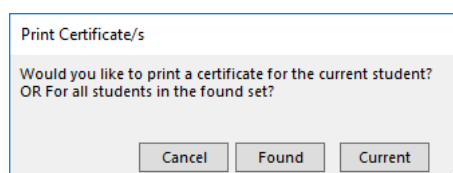
Would you like to print or email the booking confirmation?

## Printing Certificates and Records of Achievement

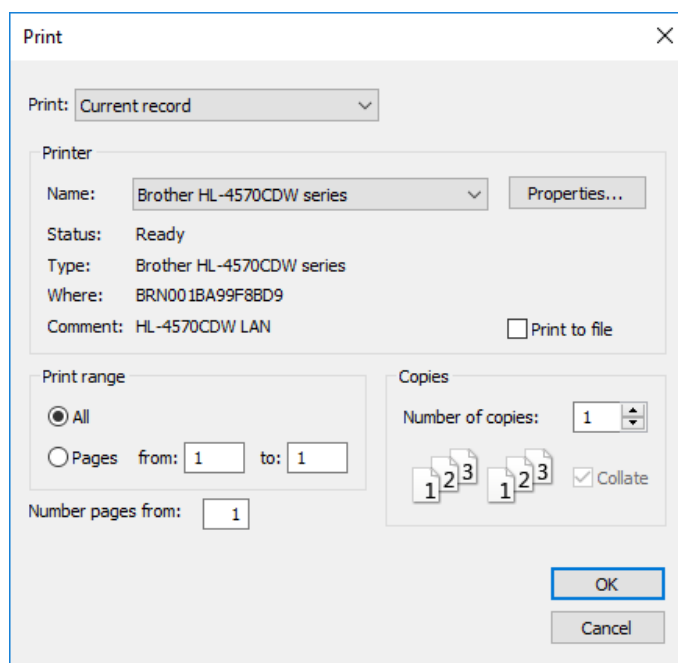
### Printing Certificates

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.

Print

Print: Current record

Printer

Name: Brother HL-4570CDW series Properties...

Status: Ready

Type: Brother HL-4570CDW series

Where: BRN001BA99F8BD9

Comment: HL-4570CDW LAN ☐ Print to file

Print range

☒ All

☐ Pages from: 1 to: 1

Number pages from: 1

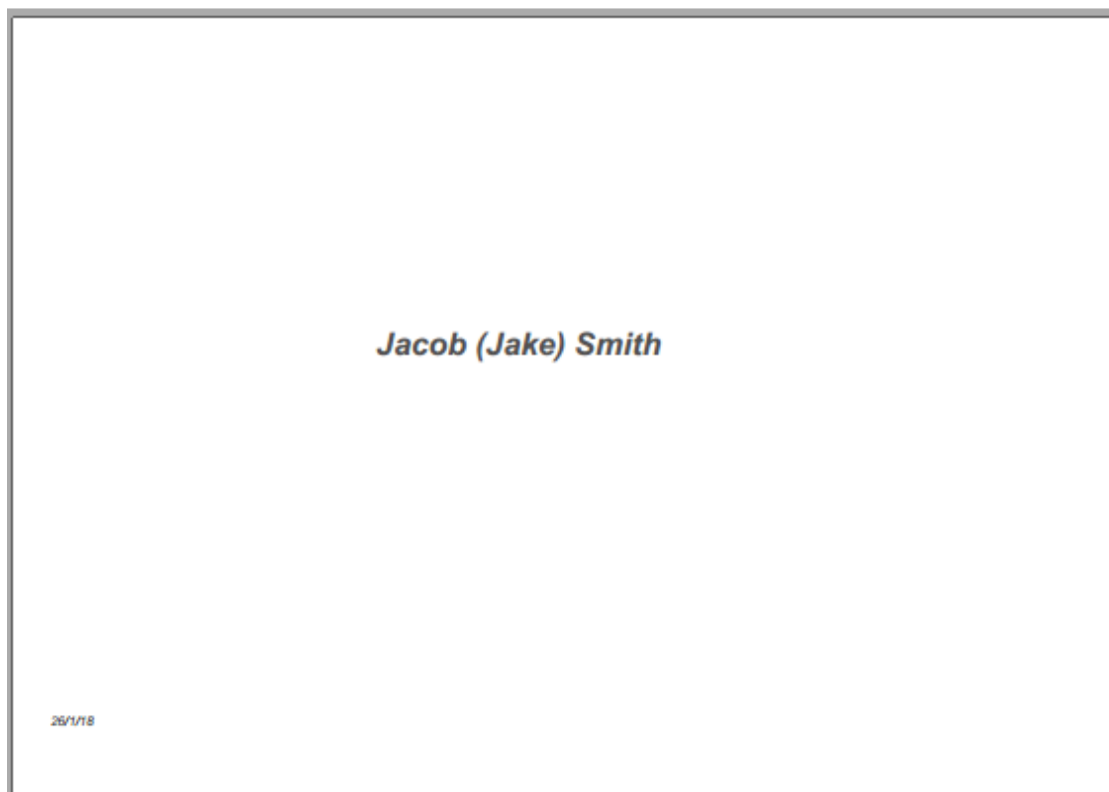
Copies

Number of copies: 1

☒ Collate

OK

Cancel

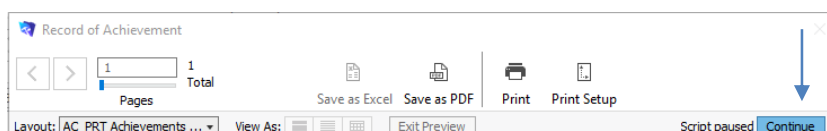


The certificate will be date stamped on the bottom left corner.

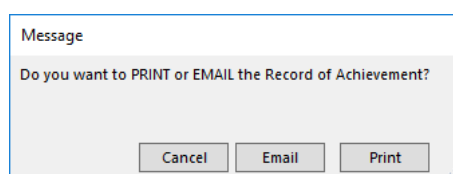
## Printing a Record of Achievement

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.



**YOUR SWIM SCHOOL NAME HERE**  
Wellington  
Telephone:



**Record of Achievement for Jake Smith**

**Level 3 - Penguin**

1

Blowing Bubbles Eyes Under

Needs to work on ....

2

Freestyle kick with board

3

A torpedo

4

4 circle arms

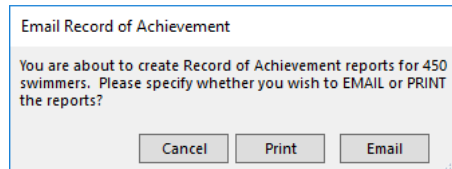
5

Back Kick

### ***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 **Record of Achievement** dialog will be displayed on your screen.



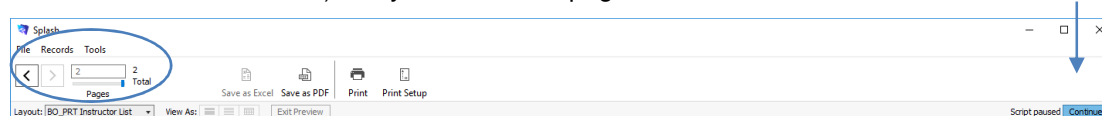
5. Click **Print** to print the report, **Email** to save the report as a PDF and email to each client, or **Cancel** to return to your original screen without printing or emailing.

## Printing Booking Reports

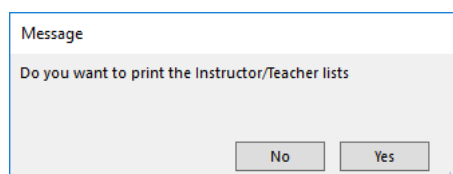
### Printing a Student List for the Instructor

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.

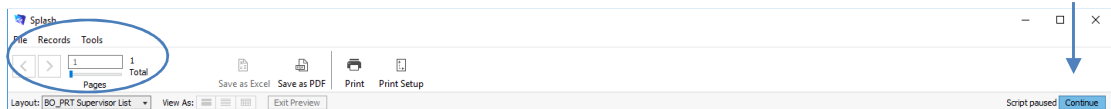
Attendance List											
Instructor Listing for Lisa Wilson											
Wednesday											
3:30 PM - Penguin (Main Pool) Lisa Wilson (1 Students)											
				10/1	17/1	24/1	31/1				8 books
<input type="radio"/>	Melanie McArthur	2_8m	Andrew McArthur	P							2
4:00 PM - Penguin (Main Pool) Lisa Wilson (1 Students)											
				10/1	17/1	24/1	31/1				8 books
<input checked="" type="radio"/>	Jacob (Jake) Smith	5_8m	Barbara Smith	-	-	0	0	0	0	-	11
4:30 PM - Penguin (Main Pool) Lisa Wilson (2 Students)											
				10/1	17/1	24/1	31/1				8 books
<input type="radio"/>	Benjamin	2_3m	Barbara Nighti	P							2
<input checked="" type="radio"/>	Sam Smith	6_3m	Barbara Smith	P							2
5:00 PM - Penguin (Main Pool) Lisa Wilson (1 Students)											
				10/1	17/1	24/1	31/1				8 books
<input type="radio"/>	Peter Aplin	3_0m	Sylvia Aplin	P							2
5:30 PM - Penguin (Main Pool) Lisa Wilson (2 Students)											
				10/1	17/1	24/1	31/1				8 books
<input type="radio"/>	Barry Robinson	4_0m	Nicola Robinso	P							2
<input type="radio"/>	james gill	2_5m		P							2



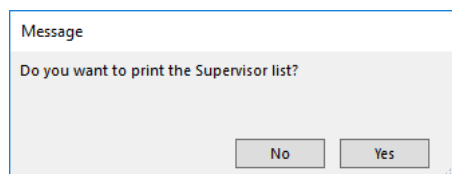
## Printing a List of Students for the Pool Deck Supervisor

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.



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.



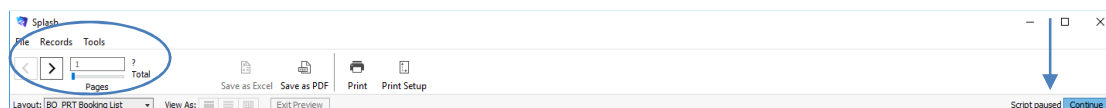
6. Click **OK** to print the report or Cancel to return to your original screen without printing.

Attendance List											
Supervisor Listing for Wednesday											
9:00 AM - Turtles (Learners Pool) Brian Roberts (2 Students)											
Brian Roberts				10/1	17/1	24/1	31/1				
<input checked="" type="radio"/>	Georgia Taylor	5_9m	Martha Taylor	P							8
<input checked="" type="radio"/>	Hayden Hughson	6_0m	Ngaire Hughson	P							8
3:30 PM - Penguin (Main Pool) Lisa Wilson (1 Students)											
Lisa Wilson				10/1	17/1	24/1	31/1				
<input checked="" type="radio"/>	Melanie McArthur	2_8m	Andrew McArthur	P							2
4:00 PM - Penguin (Main Pool) Lisa Wilson (1 Students)											
Lisa Wilson				10/1	17/1	24/1	31/1				
<input checked="" type="radio"/>	Jacob (Jake) Smith	5_6m	Barbara Smith			0	0	0	0		11
4:30 PM - Penguin (Main Pool) Lisa Wilson (2 Students)											
Lisa Wilson				10/1	17/1	24/1	31/1				
<input checked="" type="radio"/>	Benjamin	2_3m	Barbara Nighti	P							2
<input checked="" type="radio"/>	Sam Smith	6_3m	Barbara Smith	P							2
5:00 PM - Penguin (Main Pool) Lisa Wilson (1 Students)											
Lisa Wilson				10/1	17/1	24/1	31/1				
<input checked="" type="radio"/>	Peter Aplin	3_0m	Sylvia Aplin	P							2

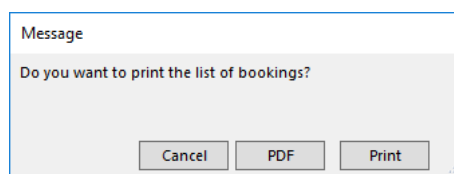
## Printing a List of Bookings

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.

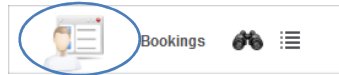
Student ID / Name	Class Name	Start Date / Time	Block / Year	Rebooked	Next Block
2032 sam jones	Dolphins	14/1/18 6:00 PM	Jan 2018 Booking Made	Yes	
115 Jennifer Smith	Jellyfish	11/1/18 11:00 AM	Jan 2018 Booking Made	Yes	
158 simon thomas	Jellyfish	11/1/18 4:00 PM	Jan 2018 Booking Made	Yes	
2037 debra Patterson	Jellyfish	11/1/18 4:00 PM	Jan 2018 Booking Made	Yes	
23 Jamie Anderson	Jellyfish	15/1/18 5:00 PM	Jan 2018 Booking Made	Yes	
166 william Smith	Jellyfish	11/1/18 4:00 PM	Jan 2018 Booking Made	Yes	
111 James Wilson	Jellyfish	15/1/18 3:30 PM	Jan 2018 Booking Made	Yes	
123 Jamie watkins	Jellyfish	15/1/18 4:30 PM	Jan 2018 Booking Made	Yes	
85 Corey Morrison	Jellyfish	15/1/18 5:30 PM	Jan 2018 Booking Made	Yes	
2042 Jessica Hargreaves	Jellyfish	16/1/18 4:30 PM	Jan 2018 Booking Made	Yes	
59 Nicholas Larsen	Jellyfish	9/1/18 4:00 PM	Jan 2018 Booking Made	Yes	
103 Gareth Buchanan	Jellyfish	9/1/18 4:00 PM	Jan 2018 Booking Made	Yes	
43 Jonathan Fairbrother	Jellyfish	16/1/18 3:30 PM	Jan 2018 Booking Made	Yes	
45 Stephanie Hughson	Jellyfish	12/1/18 8:45 AM	Jan 2018 Booking Made	Yes	
159 Tony Zelish	Penguin	8/1/18 4:00 PM	Jan 2018 Booking Made	Yes	
162 Lucas Smith	Penguin	8/1/18 4:30 PM	Jan 2018 Paid in Full	Yes	

## Printing a Report with Overdue Balances

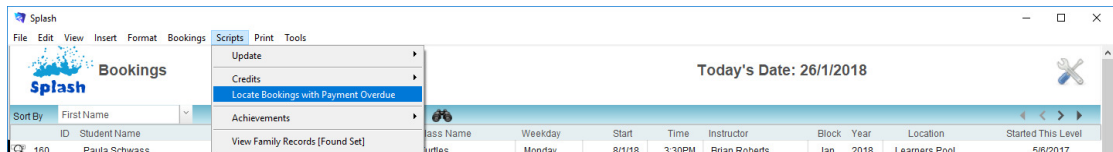
Information displayed in this report is defined by the found set of records. Prior to generating this report you must perform a find to locate the group of records you wish to include in your report.

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).

Locate Overdue Bookings

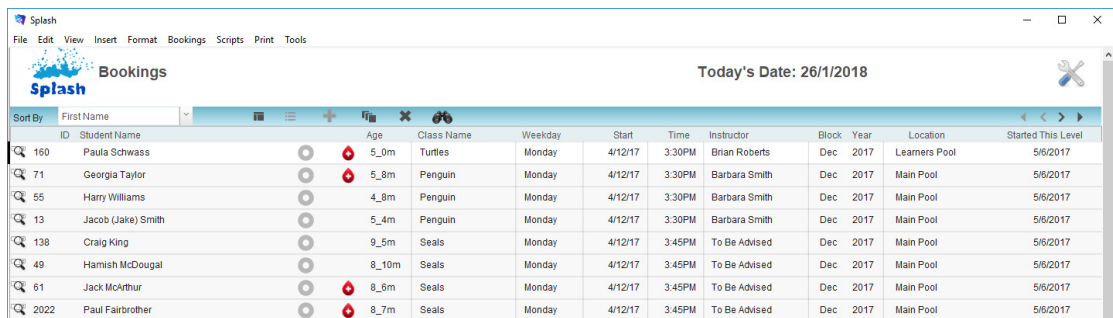
Please enter the term for the bookings you wish to locate.

Term (leave empty for all terms)  
Dec

Year (leave empty for all terms)  
2017

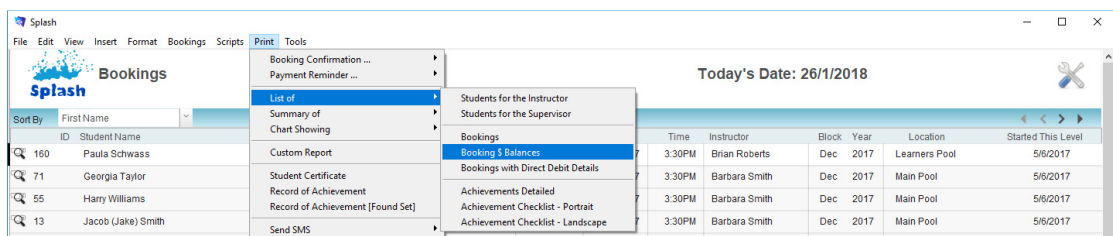
Cancel OK

5. Click the **OK** button to locate bookings which are overdue for payment.



ID	Student Name	Age	Class Name	Weekday	Start	Time	Instructor	Block	Year	Location	Started This Level
160	Paula Schwass	5_0m	Turtles	Monday	4/12/17	3:30PM	Brian Roberts	Dec	2017	Leamers Pool	5/6/2017
71	Georgia Taylor	5_8m	Penguin	Monday	4/12/17	3:30PM	Barbara Smith	Dec	2017	Main Pool	5/6/2017
55	Harry Williams	4_8m	Penguin	Monday	4/12/17	3:30PM	Barbara Smith	Dec	2017	Main Pool	5/6/2017
13	Jacob (Jake) Smith	5_4m	Penguin	Monday	4/12/17	3:30PM	Barbara Smith	Dec	2017	Main Pool	5/6/2017
138	Craig King	9_5m	Seals	Monday	4/12/17	3:45PM	To Be Advised	Dec	2017	Main Pool	5/6/2017
49	Hamish McDougal	8_10m	Seals	Monday	4/12/17	3:45PM	To Be Advised	Dec	2017	Main Pool	5/6/2017
61	Jack McArthur	8_6m	Seals	Monday	4/12/17	3:45PM	To Be Advised	Dec	2017	Main Pool	5/6/2017
2022	Paul Fairbrother	8_7m	Seals	Monday	4/12/17	3:45PM	To Be Advised	Dec	2017	Main Pool	5/6/2017

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.

Print Report

Do you want to print the selected report?

Cancel PDF Print

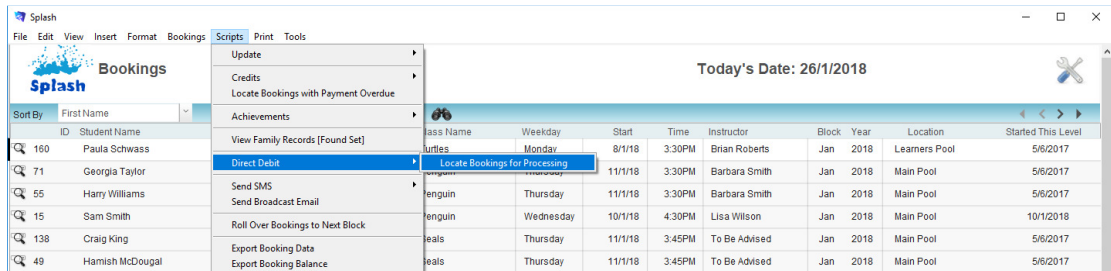
8. Click **OK** to print the report or Cancel to return to your original screen without printing.

<b>Bookings - Current Balance of Booking</b>		
Balance as at 26/1/2018		
		Balance
<b>Anderson (David Anderson)</b>	<b>0272222082</b>	<b>\$40.50</b>
<i>Sally : Shrimps 10:00 AM Thu block Dec 2017 (\$40.50)</i>		
<b>Apollo (Martha Apollo)</b>	<b>0272222082</b>	<b>\$81.00</b>
<i>Anthony : Turtles 11:00 AM Thu block Dec 2017 (\$40.50)</i>		
<i>Peter : Shrimps 10:00 AM Thu block Dec 2017 (\$40.50)</i>		
<b>Buchanan (Debbie Buchanan)</b>	<b>0272222082</b>	<b>\$54.00</b>
<i>Gareth : Jellyfish 4:00 PM Tue block Dec 2017 (\$54.00)</i>		
<b>Fairbrother (Mark Fairbrother)</b>	<b>0272222082</b>	<b>\$60.00</b>
<i>Paul : Seals 3:45 PM Mon block Dec 2017 (\$60.00)</i>		
<b>Hargreaves (Susan Hargreaves)</b>	<b>0272222082</b>	<b>\$60.00</b>
<i>Gregory : Starfish 5:00 PM Tue block Dec 2017 (\$60.00)</i>		
<b>Harper (Edith Harper)</b>	<b>0272222082</b>	<b>\$45.00</b>
<i>Robert : Turtles 10:00 AM Thu block Dec 2017 (\$45.00)</i>		
<b>Hughson (Ngaire Hughson)</b>	<b>0272222082</b>	<b>\$40.50</b>
<i>Hayden : Turtles 9:00 AM Wed block Dec 2017 (\$40.50)</i>		
<b>Jessop (Tony Jessop)</b>	<b>04 478 3215</b>	<b>\$40.50</b>
<i>William : Turtles 10:30 AM Thu block Dec 2017 (\$40.50)</i>		
<b>Jones (David Jones)</b>	<b>0272222082</b>	<b>\$180.60</b>
<i>Billy : Turtles 4:00 PM Mon block Dec 2017 (\$40.50)</i>		
<i>Joanne : Turtles 4:30 PM Mon block Dec 2017 (\$40.50)</i>		
<i>Joanne : Turtles 11:00 AM Thu block Dec 2017 (\$40.50)</i>		
<i>william : Jellyfish 4:00 PM Mon block Dec 2017 (\$59.10)</i>		

## Printing a List of Booking with Authority to Direct Debit

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. Select **Direct Debit... Locate Bookings for Processing** from the Scripts menu..



2. The locate payments dialog will be displayed on your screen. You will be asked to confirm the Block and Year for bookings to be processed

Locate Payments

Enter find criteria for payment processing.

Block  
Jan

Year  
2018

Cancel OK

3. You will be asked to specify the direct debit type.

Specify Debit Type

Are you requesting funds from Bank Accounts or Credit Cards?

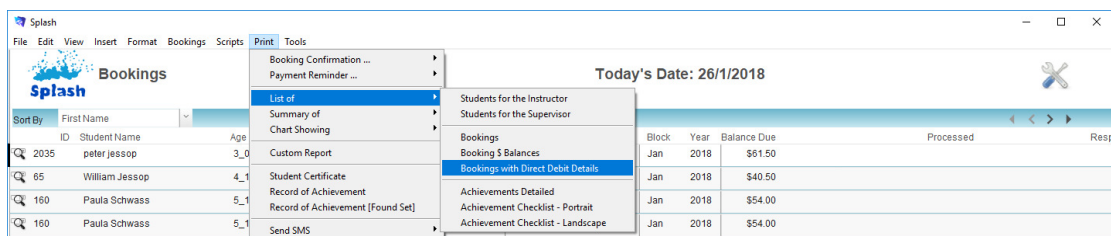
Cancel CC Bank

4. The bookings for processing will be displayed on your screen.

The screenshot shows the 'Splash Bookings' application window with the 'List of... Bookings with Direct Debit Details' report displayed. The report shows a list of bookings with columns: ID, Student Name, Age, Class Name, Weekday, Start Date, Payment by, Amount, Block, Year, Balance Due, Processed, and Resp.

ID	Student Name	Age	Class Name	Weekday	Start Date	Payment by	Amount	Block	Year	Balance Due	Processed	Resp
160	Paula Schwass	5_1m	Turtles	Monday	8/1/18	CC	\$13.50	Jan	2018	\$54.00		
65	William Jessop	4_10m	Turtles	Thursday	11/1/18	CC	\$13.50	Jan	2018	\$40.50		
160	Paula Schwass	5_1m	Turtles	Monday	8/1/18	CC	\$13.50	Jan	2018	\$54.00		
2035	peter jessop	3_0m	Penguin	Sunday	14/1/18	CC	\$20.50	Jan	2018	\$61.50		

5. Select **List of... Bookings with Direct Debit Details** from the Print menu.



6. 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.

Print Report

Do you want to print the selected report?

Cancel

PDF

Print

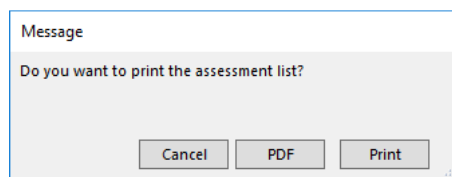
- Click **Print** to print the report, PDF to save a copy of the report, or Cancel to return to your original screen without printing.

Bookings - Direct Debit Payment Summary		
Schedule as at 26/1/2018		
	Amount	Balance
<b>jessop (Tony Jessop)</b>		
<i>peter : Penguin 5:00 PM Sun block Jan 2018</i>	\$20.50	\$81.50
<i>William : Turtles 10:30 AM Thu block Jan 2018</i>	\$13.50	\$40.50
<b>Schwass (Robyn Schwass)</b>		
<i>Paula : Turtles 3:30 PM Mon block Jan 2018</i>	\$13.50	\$54.00
<i>Paula : Turtles 4:30 PM Mon block Jan 2018</i>	\$13.50	\$54.00
<b>Total Due as at 26/1/2018</b>	<b>\$61.00</b>	

### 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 Monday			
3:30 PM	Jellyfish (David Smith)		
James Wilson	4_1m	Attempts:	
1	Freestyle kick		
2	Backstroke kick		
4	Kneeling dive		
5	10 m freestyle and 10m backstroke		
6	10m Backstroke		
3:30 PM	Penguin (Barbara Smith)		
Georgia Taylor	5_9m	Attempts:	
1	Blowing Bubbles Eyes Under		Learning
2	Freestyle kick with board		Mastered 12/10/2017
3	A torpedo		Mastered 15/10/2017
4	4 circle arms		Introduced
5	Back Kick		

### 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.

Message

Do you want to print the assessment listing?

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

#### Assessment Listing for Monday

**3:30 PM - Turtles (Learners Pool) Brian Roberts (1 Students)**

		HW	BB	Fues	FFloa	Torp				Blocks
<input checked="" type="radio"/> Paula Schwass	5_1m	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11

**3:30 PM - Jellyfish (Main Pool) David Smith (1 Students)**

		Fr	Kirk	Blk	Kirk	K	Fhus	10fr	10blk	Blocks
<input type="radio"/> James Wilson	4_1m	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2

**3:30 PM - Penguin (Main Pool) Barbara Smith (2 Students)**

		BB	Fues	Bd	Kirk	Torp	4	Arms	Blk	Kirk	Blocks
<input checked="" type="radio"/> Georgia Taylor	5_9m	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14
<input type="radio"/> Harry Williams	4_9m	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9

**3:45 PM - Seals (Main Pool) To Be Advised (4 Students)**

		Bf	Kirk	50fr	50blk	25br				Blocks
<input type="radio"/> Craig King	9_8m	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9
<input type="radio"/> Hamish McDougal	8_11m	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9
<input checked="" type="radio"/> Jack McArthur	8_7m	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9
<input checked="" type="radio"/> Paul Fairbrother	8_9m	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9

**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 Monday

### 3:30 PM - Turtles (Learners Pool) Brian Roberts (1 Students)

			HW	BB	FF	Torp												Blocks
	Paula Schwass	5_1m																11

### 3:30 PM - Jellyfish (Main Pool) David Smith (1 Students)

			Fr	Kirk	Bk	K	Dave	10f	10bk									Blocks
	James Wilson	4_1m																2

### 3:30 PM - Penguin (Main Pool) Barbara Smith (2 Students)

			BB	Funa	Bd	Kirk	Torp	4	Arme	Bk	Kirk							Blocks
	Georgia Taylor	5_9m	L		M		M		I									14
	Harry Williams	4_9m																9

### 3:45 PM - Seals (Main Pool) To Be Advised (4 Students)

			BF	Kirk	50f	50bk	25br											Blocks
	Craig King	9_8m																9
	Hamish McDougal	8_11m																9
	Jack McArthur	8_7m																9
	Paul Fairbrother	8_9m																9

## 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.

<b>Summary of Attendance</b>														
Attendance Code : P														
<b>Block Jan - 2018</b>														
<b>Monday</b>	8/01	15/01	22/01	29/01										
	13	10	14	13	15	0	0	0	0	0	0	0	0	0
Jellyfish		0	4	4	4	0	0	0	0	0	0	0	0	0
Penguin		3	3	3	3	0	0	0	0	0	0	0	0	0
Seals		1	1	1	1	0	0	0	0	0	0	0	0	0
Turtles		6	6	5	7	0	0	0	0	0	0	0	0	0
<b>Tuesday</b>	9/01	16/01	23/01	30/01										
	8	8	8	8	0	0	0	0	0	0	0	0	0	0
Jellyfish		4	4	4	0	0	0	0	0	0	0	0	0	0
Starfish		4	4	4	0	0	0	0	0	0	0	0	0	0
<b>Wednesday</b>	10/01	17/01	24/01	31/01	31/01									
	9	9	9	9	0	0	0	0	0	0	0	0	0	0
Penguin		7	7	7	0	0	0	0	0	0	0	0	0	0
Turtles		2	2	2	0	0	0	0	0	0	0	0	0	0
<b>Thursday</b>	11/01	18/01	25/01											
	23	23	23	23	0	0	0	0	0	0	0	0	0	0
Jellyfish		4	4	4	0	0	0	0	0	0	0	0	0	0
Penguin		2	2	2	0	0	0	0	0	0	0	0	0	0
Seals		4	4	4	0	0	0	0	0	0	0	0	0	0
Shrimps		6	6	6	0	0	0	0	0	0	0	0	0	0
Turtles		7	7	7	0	0	0	0	0	0	0	0	0	0
<b>Friday</b>	12/01	19/01	26/01											
	7	7	7	7	0	0	0	0	0	0	0	0	0	0
Jellyfish		1	1	1	0	0	0	0	0	0	0	0	0	0

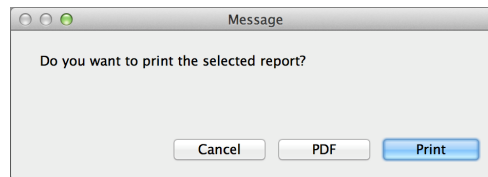
1/2/2018 : 09:51:02 AM

Page 1

### 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.

<b>Summary of Bookings</b>			
Summary by Class Name			
	Number of Bookings	Number of Exits	Number of Catchups
<b>Term: 2 2014</b>	36	1	6
<b>Dolphins</b>	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
<b>Seals</b>	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.

Message

Do you want 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 Class Name			
	Number of Bookings	Number of Exits	Number of Catchups
Term: Jan 2018	66	0	4
Dolphins	1	0	0
Sunday	1	0	0
Jellyfish	13	0	0
Monday	4	0	0
Tuesday	4	0	0
Thursday	4	0	0
Friday	1	0	0
Penguin	20	0	2
Monday	3	0	0
Wednesday	7	0	0
Thursday	2	0	0
Friday	3	0	2
Sunday	5	0	0
Seals	7	0	0
Monday	1	0	0
Thursday	4	0	0
Friday	2	0	0
Shrimps	6	0	0
Thursday	6	0	0
Starfish	5	0	0
Tuesday	4	0	0
Friday	1	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.

Message

Do you want to print the selected report?

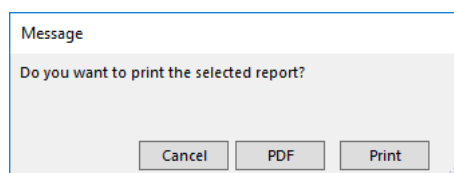
5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Summary of Bookings			
Summary by Weekday			
	Number of Bookings	Number of Exits	Number of Catchups
Term: Jan 2018	66	0	4
Monday	13	0	2
Jellyfish	4	0	0
Penguin	3	0	0
Seals	1	0	0
Turtles	5	0	2
Tuesday	8	0	0
Jellyfish	4	0	0
Starfish	4	0	0
Wednesday	9	0	0
Penguin	7	0	0
Turtles	2	0	0
Thursday	23	0	0
Jellyfish	4	0	0
Penguin	2	0	0
Seals	4	0	0
Shrimps	6	0	0
Turtles	7	0	0
Friday	7	0	2
Jellyfish	1	0	0
Penguin	3	0	2
Seals	2	0	0
Starfish	1	0	0

### 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: Jan 2018	66	0	4
Parent & Child	20	0	2
Shrimps	6	0	0
Turtles	14	0	2
Preschool	20	0	2
Penguin	20	0	2
School Age	26	0	0
Dolphins	1	0	0
Jellyfish	13	0	0
Seals	7	0	0
Starfish	5	0	0
Total Reported	66	0	4

### 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.

Message

Do you want 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 1/2/2018								
	Total Cost	Total Discount	Value Credits	Value Free Lessons	Plus Late Payment	Value Exits	Total Paid	Total Outstanding
<b>Dolphins</b>	\$80.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$80.00
Sunday	\$80.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$80.00
<b>Jellyfish</b>	\$820.00	\$72.90		\$0.00	\$0.00	\$0.00	\$0.00	\$847.10
Monday	\$320.00	\$32.00		\$0.00	\$0.00	\$0.00	\$0.00	\$288.00
Tuesday	\$320.00	\$24.00		\$0.00	\$0.00	\$0.00	\$0.00	\$296.00
Thursday	\$240.00	\$12.90		\$0.00	\$0.00	\$0.00	\$0.00	\$227.10
Friday	\$40.00	\$4.00		\$0.00	\$0.00	\$0.00	\$0.00	\$36.00
<b>Penguin</b>	\$1,327.00	\$126.35		\$0.00	\$0.00	\$0.00	\$73.80	\$1,126.85
Monday	\$242.00	\$24.20		\$0.00	\$0.00	\$0.00	\$73.80	\$144.00
Wednesday	\$543.50	\$54.15		\$0.00	\$0.00	\$0.00	\$0.00	\$489.35
Thursday	\$120.00	\$12.00		\$0.00	\$0.00	\$0.00	\$0.00	\$108.00
Friday	\$120.00	\$12.00		\$0.00	\$0.00	\$0.00	\$0.00	\$108.00
Sunday	\$301.50	\$24.00		\$0.00	\$0.00	\$0.00	\$0.00	\$277.50
<b>Seals</b>	\$400.00	\$34.00		\$0.00	\$0.00	\$0.00	\$0.00	\$366.00
Monday	\$80.00	\$8.00		\$0.00	\$0.00	\$0.00	\$0.00	\$72.00
Thursday	\$240.00	\$18.00		\$0.00	\$0.00	\$0.00	\$0.00	\$222.00
Friday	\$80.00	\$8.00		\$0.00	\$0.00	\$0.00	\$0.00	\$72.00
<b>Shrimps</b>	\$270.00	\$27.00		\$0.00	\$0.00	\$0.00	\$0.00	\$243.00
Thursday	\$270.00	\$27.00		\$0.00	\$0.00	\$0.00	\$0.00	\$243.00
<b>Starfish</b>	\$380.00	\$28.00		\$0.00	\$0.00	\$0.00	\$72.00	\$280.00

10:12:04 AM

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### 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.

Message

Do you want 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 1/2/2018								
	Total Cost	Total Discount	Value Credits	Value Free Lessons	Plus Late Payment	Value Exits	Total Paid	Total Outstanding
<b>Monday</b>	\$942.00	\$88.20		\$0.00	\$0.00	\$0.00	\$73.80	\$780.00
Jellyfish	\$320.00	\$32.00		\$0.00	\$0.00	\$0.00	\$0.00	\$288.00
Penguin	\$242.00	\$24.20		\$0.00	\$0.00	\$0.00	\$73.80	\$144.00
Seals	\$80.00	\$8.00		\$0.00	\$0.00	\$0.00	\$0.00	\$72.00
Turtles	\$300.00	\$24.00		\$0.00	\$0.00	\$0.00	\$0.00	\$276.00
<b>Tuesday</b>	\$640.00	\$48.00		\$0.00	\$0.00	\$0.00	\$72.00	\$520.00
Jellyfish	\$320.00	\$24.00		\$0.00	\$0.00	\$0.00	\$0.00	\$296.00
Starfish	\$320.00	\$24.00		\$0.00	\$0.00	\$0.00	\$72.00	\$224.00
<b>Wednesday</b>	\$683.50	\$68.15		\$0.00	\$0.00	\$0.00	\$0.00	\$597.35
Penguin	\$543.50	\$54.15		\$0.00	\$0.00	\$0.00	\$0.00	\$489.35
Turtles	\$120.00	\$12.00		\$0.00	\$0.00	\$0.00	\$0.00	\$108.00
<b>Thursday</b>	\$1,185.00	\$92.85		\$0.00	\$0.00	\$0.00	\$85.05	\$1,007.10
Jellyfish	\$240.00	\$12.90		\$0.00	\$0.00	\$0.00	\$0.00	\$227.10
Penguin	\$120.00	\$12.00		\$0.00	\$0.00	\$0.00	\$0.00	\$108.00
Seals	\$240.00	\$18.00		\$0.00	\$0.00	\$0.00	\$0.00	\$222.00
Shrimps	\$270.00	\$27.00		\$0.00	\$0.00	\$0.00	\$0.00	\$243.00
Turtles	\$315.00	\$22.95		\$0.00	\$0.00	\$0.00	\$85.05	\$207.00
<b>Friday</b>	\$280.00	\$28.00		\$0.00	\$0.00	\$0.00	\$0.00	\$252.00
Jellyfish	\$40.00	\$4.00		\$0.00	\$0.00	\$0.00	\$0.00	\$36.00
Penguin	\$120.00	\$12.00		\$0.00	\$0.00	\$0.00	\$0.00	\$108.00

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### 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.

Message

Do you want 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 1/2/2018								
	Total Cost	Total Discount	Value Credits	Value Free Lessons	Plus Late Payment	Value Exits	Total Paid	Total Outstanding
<b>Afternoon</b>	\$3,027.00	\$251.25		\$0.00	\$0.00	\$0.00	\$145.80	\$2,629.95
Monday	\$942.00	\$88.20		\$0.00	\$0.00	\$0.00	\$73.80	\$780.00
Tuesday	\$640.00	\$48.00		\$0.00	\$0.00	\$0.00	\$72.00	\$520.00
Wednesday	\$543.50	\$54.15		\$0.00	\$0.00	\$0.00	\$0.00	\$489.35
Thursday	\$540.00	\$36.90		\$0.00	\$0.00	\$0.00	\$0.00	\$503.10
Sunday	\$361.50	\$24.00		\$0.00	\$0.00	\$0.00	\$0.00	\$337.50
<b>Morning</b>	\$1,045.00	\$95.95		\$0.00	\$0.00	\$0.00	\$85.05	\$884.00
Wednesday	\$120.00	\$12.00		\$0.00	\$0.00	\$0.00	\$0.00	\$108.00
Thursday	\$645.00	\$55.95		\$0.00	\$0.00	\$0.00	\$85.05	\$504.00
Friday	\$280.00	\$28.00		\$0.00	\$0.00	\$0.00	\$0.00	\$252.00
<b>Total Reported</b>	\$4,072.00	\$347.20		\$0.00	\$0.00	\$0.00	\$230.85	\$3,493.95

### 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.

Message

Do you want to print the selected report?

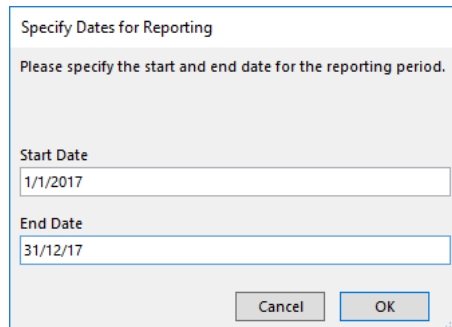
5. Click **OK** to print the report or Cancel to return to your original screen without printing.

Summary of Booking Revenue as at 1/2/2018								
	Total Cost	Total Discount	Value Credits	Value Free Lessons	Plus Late Payment	Value Exits	Total Paid	Total Outstanding
Parent & Child	\$1,005.00	\$85.95		\$0.00	\$0.00	\$0.00	\$85.05	\$834.00
Shrimps	\$270.00	\$27.00		\$0.00	\$0.00	\$0.00	\$0.00	\$243.00
Turtles	\$735.00	\$58.95		\$0.00	\$0.00	\$0.00	\$85.05	\$591.00
Preschool	\$1,327.00	\$126.35		\$0.00	\$0.00	\$0.00	\$73.80	\$1,126.85
Penguin	\$1,327.00	\$126.35		\$0.00	\$0.00	\$0.00	\$73.80	\$1,126.85
School Age	\$1,740.00	\$134.90		\$0.00	\$0.00	\$0.00	\$72.00	\$1,533.10
Dolphins	\$60.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$60.00
Jellyfish	\$920.00	\$72.90		\$0.00	\$0.00	\$0.00	\$0.00	\$847.10
Seals	\$400.00	\$34.00		\$0.00	\$0.00	\$0.00	\$0.00	\$366.00
Starfish	\$360.00	\$28.00		\$0.00	\$0.00	\$0.00	\$72.00	\$280.00
Total Reported	\$4,072.00	\$347.20		\$0.00	\$0.00	\$0.00	\$230.85	\$3,493.95

### Printing a Summary of Exits by Date

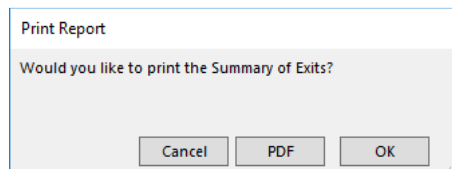
This report displays the total payments received, discounts, credits given, and expected revenue for the found set of records.

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 instruction "Please specify the start and end date for the reporting period." Below this, there are two text input fields. The first is labeled "Start Date" and contains the text "1/1/2017". The second is labeled "End Date" and contains the text "31/12/17". At the bottom right of the dialog are two buttons: "Cancel" and "OK".

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 question "Would you like to print the Summary of Exits?". At the bottom of the dialog are three buttons: "Cancel", "PDF", and "OK".

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
Other Commitments	1	1	0
Total Reported	2	2	0

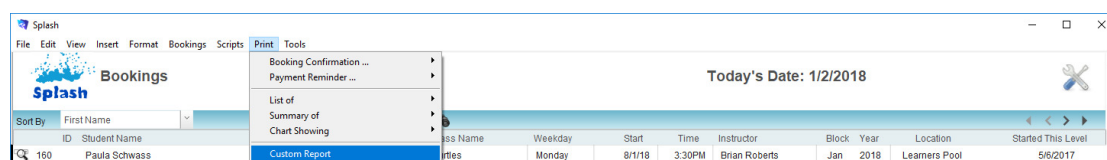
**NB:** Catchup/Makeup lessons are NOT included in exit reporting.

## 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. Select **Custom Report** from the Print menu.



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 'Produce Summary Report' and buttons for 'Edit' and 'Tools'. Below the title bar is a section 'Specify Report Format' with a printer icon. The dialog is divided into four steps:  
**Step 1 : Choose Existing Report Format**  
Report Name: A dropdown menu showing 'Summary by Shift and Instructor'.  
**Step 2: Choose/Update Report Summary Groups**  
Group 1: A dropdown menu showing 'Summarize by Shift'.  
Group 2: A dropdown menu showing 'Summarize by Instructor Name'.  
Group 3: An empty dropdown menu.  
Show Detail: An unchecked checkbox.  
**Step 3: Enter Report Title**  
Report Title: A text field containing 'Summary by Shift and Instructor'.  
**Step 4: Produce Report**  
An 'OK' button with a green checkmark icon.  
A 'Cancel' button with a red X icon.

### 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	Summarize by Shift	▼
Group 2	Summarize by Instructor Name	▼
Group 3		▼
Show Detail <input checked="" type="checkbox"/>		

#### *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	Summarize by Shift	▼
Group 2	Summarize by Instructor Name	▼
Group 3		▼
Show Detail <input type="checkbox"/>		

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	43	0	2
Barbara Smith	5	0	0
Georgia Taylor	79 Main St, Tawa, Wellington 4010	0272222082	
Harry Williams	171 Chapel St, Khandallah, Wellington 4005	0272222082	
Lucas Smith	6A Erlestoke Crescent, Churton Park, Wellington	0272222082	
Phillip Smith	89 Roberta Road, Tawa 4008	0272222082	
Tony Zelish			
Brian Roberts	5	0	2
Billy Jones	123 Any St, Wellington	0272222082	
Jason Smith	89 Roberta Road, Tawa 4008	0272222082	
Joanne Jones	123 Any St, Wellington	0272222082	
Paula Schwass	123 Any St, Wellington 6440	0272222082	
Paula Schwass	123 Any St, Wellington 6440	0272222082	
Peter Williamson	987 Essex St, Masterton 5886	0272222082	
Peter Williamson	987 Essex St, Masterton 5886	0272222082	
David Smith	7	0	0
Corey Morrison	8 Victoria St, Redwood, Wellington 4010	0272222082	
debra Patterson	76 Kent St, Newlands, Wellington 4008	04 478 6541	
James Wilson	123 Any St, Wellington 4000	0272222082	

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.

<b>Summary of Bookings</b>			
Summary by Shift and Instructor			
	Number of Bookings	Number of Exits	Number of Catchups
<b>Afternoon</b>	<b>43</b>	<b>0</b>	<b>2</b>
Barbara Smith	5	0	0
Brian Roberts	5	0	2
David Smith	7	0	0
Harry Sims	14	0	0
Lisa Wilson	7	0	0
To Be Advised	5	0	0
<b>Morning</b>	<b>23</b>	<b>0</b>	<b>2</b>
Brian Roberts	11	0	0
David Smith	5	0	0
Lisa Wilson	4	0	0
To Be Advised	3	0	2
<b>Total Reported</b>	<b>66</b>	<b>0</b>	<b>4</b>

## Printing a Chart

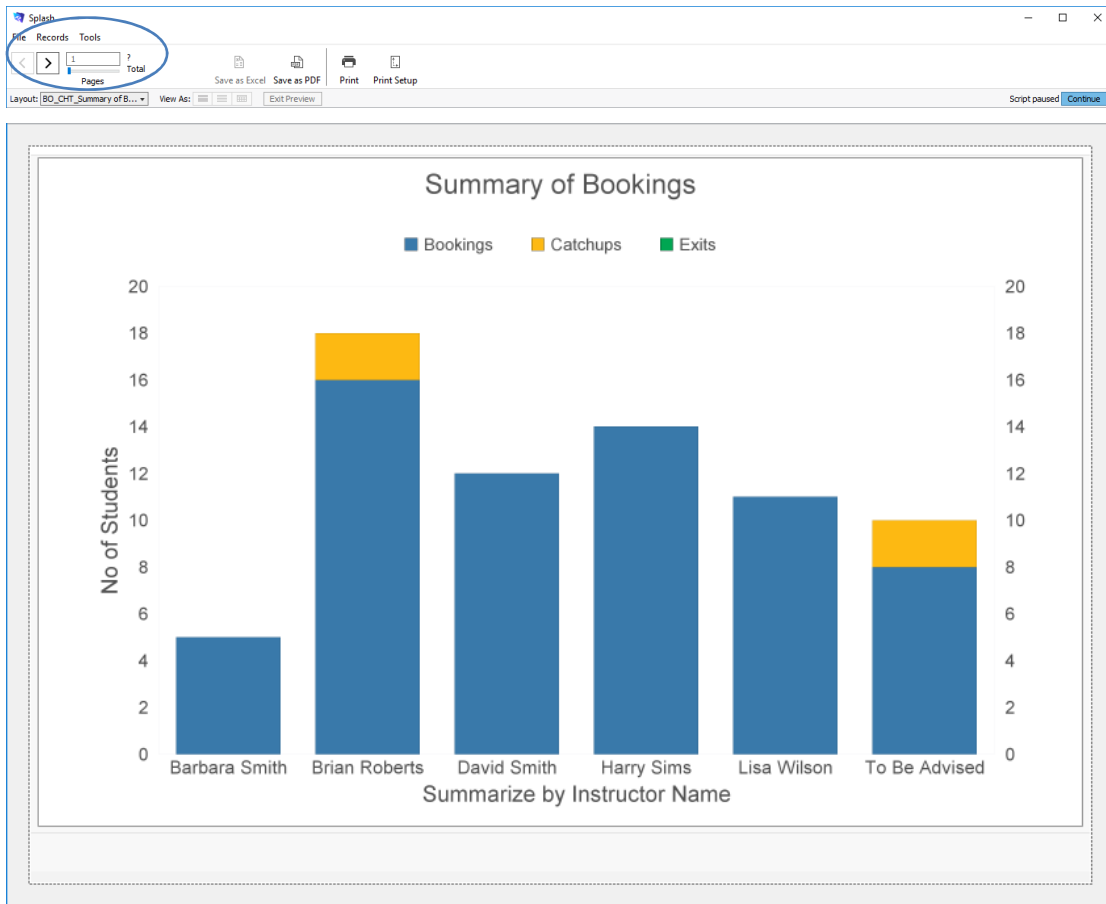
### Printing a Chart Showing Bookings by Instructor

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

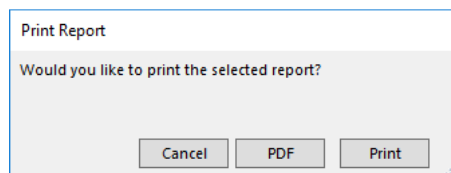
1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Summary Bookings by Instructor** from the Print menu.

The screenshot shows a software window titled "Produce Summary Report". Inside, there's a "Specify Report Format" section. It guides the user through four steps: Step 1 involves selecting a report format (currently "Summary of Bookings"); Step 2 involves choosing summary groups (currently "Summarize by Instructor Name"); Step 3 involves entering a report title (currently "Summary of Bookings"); and Step 4 is the "Produce Report" step, which includes "OK" and "Cancel" buttons.

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.



**Produce Summary Report**

Edit Tools

**Specify Report Format**

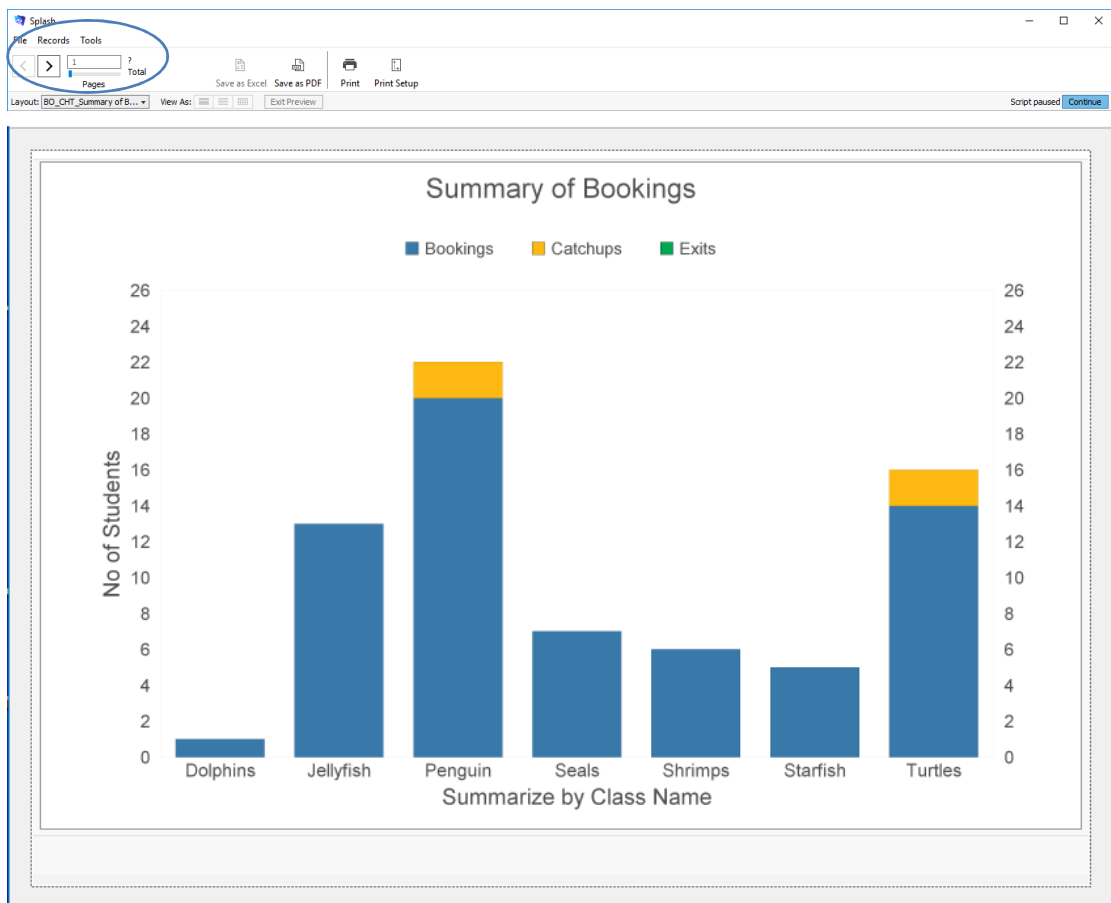
**Step 1 : Choose Existing Report Format**

Report Name Summary of Bookings

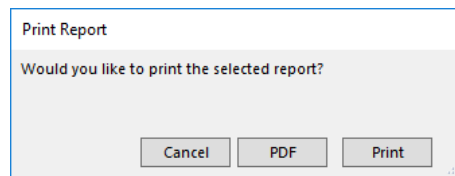
**Step 2: Choose/Update Report Summary Groups**

Group 1 Summarize by 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 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.



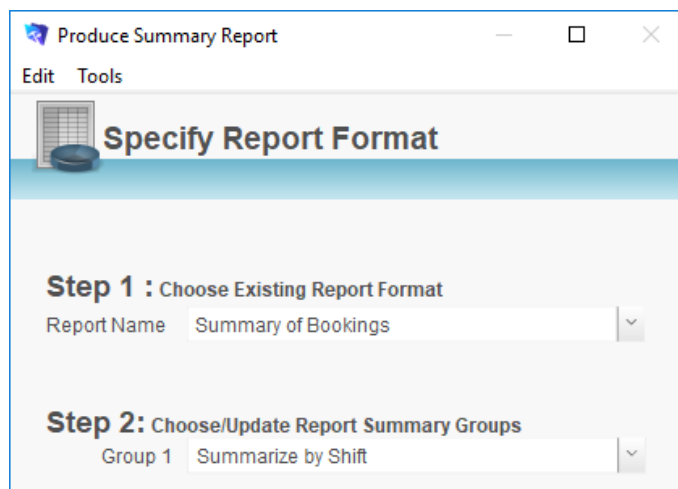
8. The **Print Report** dialog will be displayed on your screen.



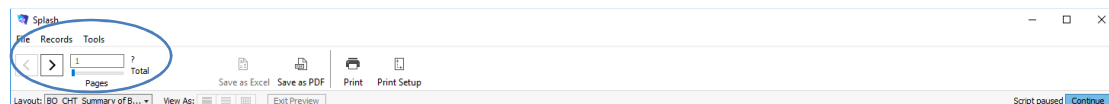
### ***Printing a Chart Showing Bookings by Shift***

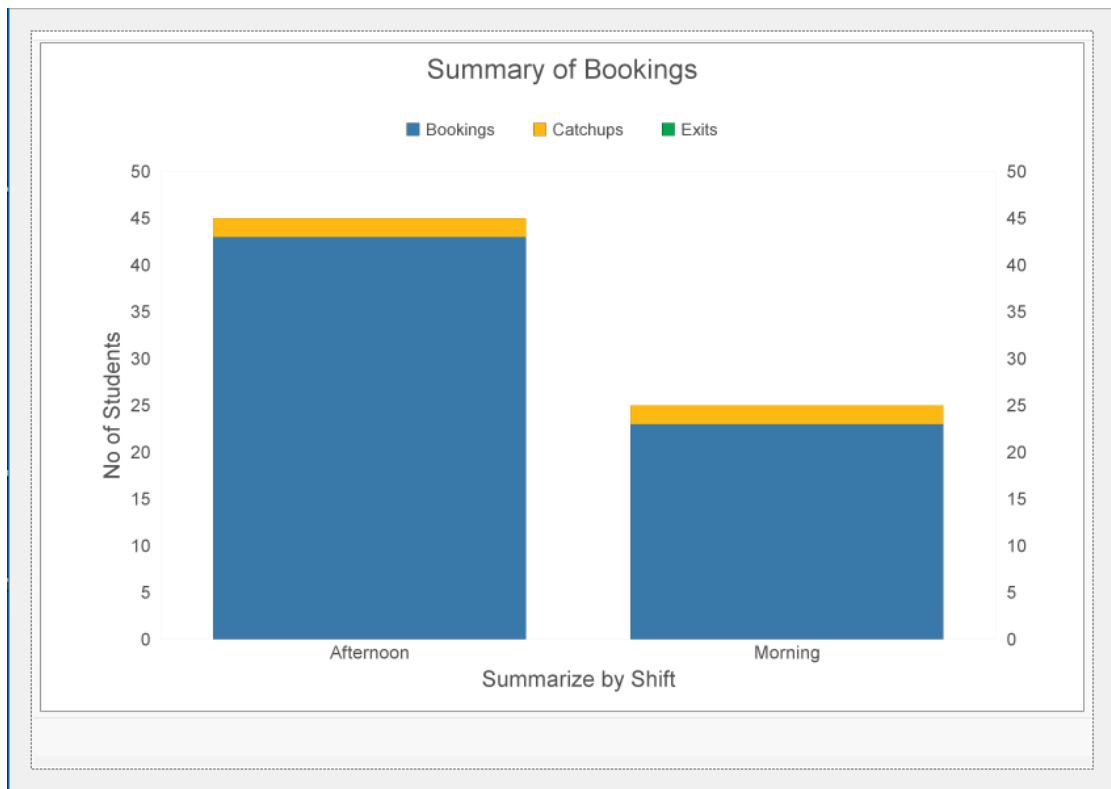
This report displays as a graph; it shows the number of bookings for each shift within the found set of records.

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... Summary of Bookings by Shift** from the Print menu.

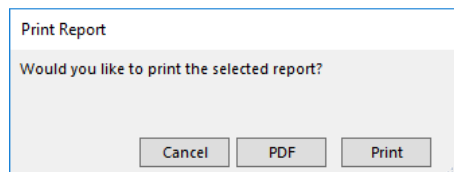


4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.  
Step 1 = Summary of Bookings  
Step 2 = Group 1 set to Summarize by Shift  
Step 3 = Report Name set to Summary by Shift.
6. Amend the grouping options at Step 2 if required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





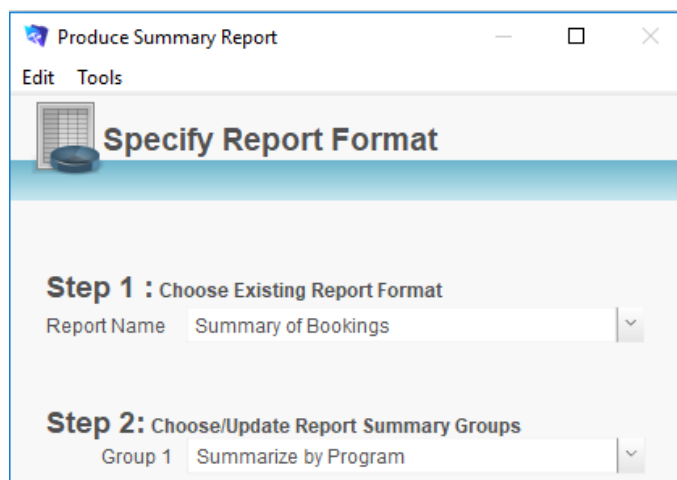
8. The **Print Report** dialog will be displayed on your screen.



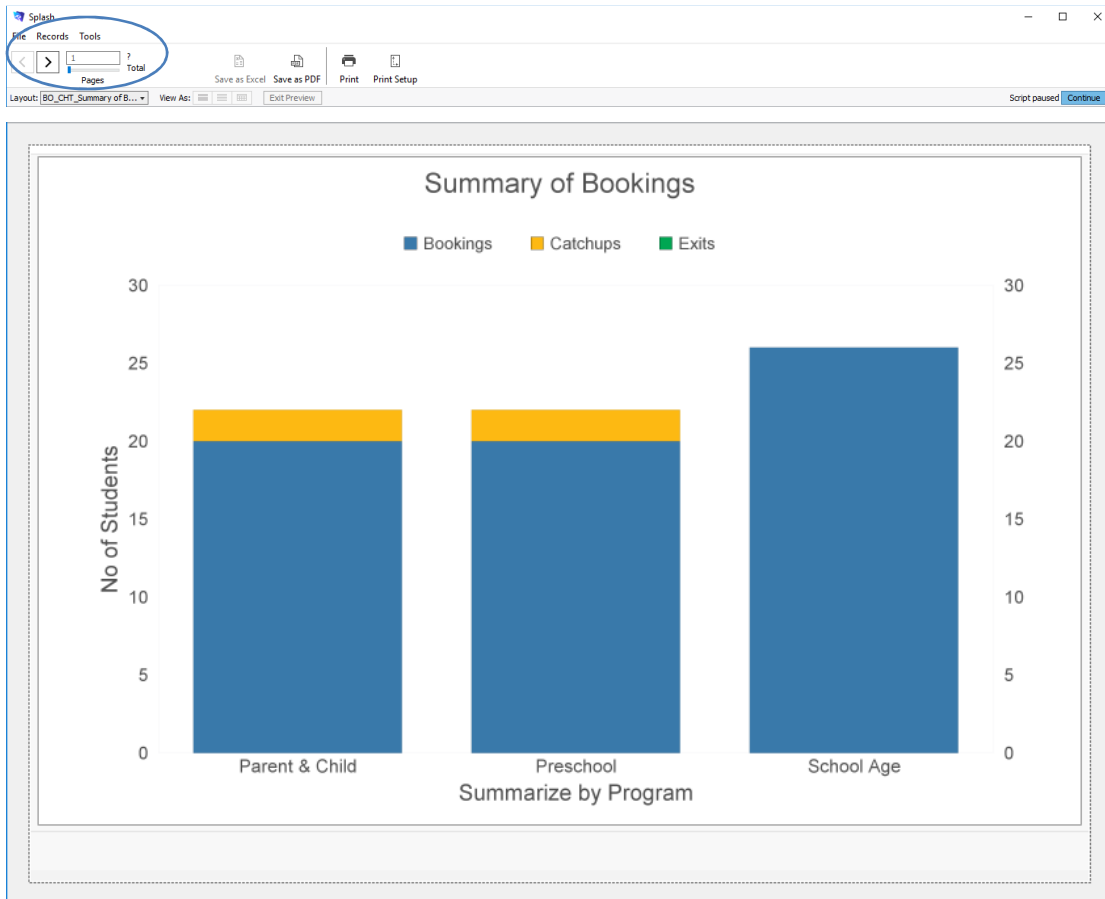
### **Printing a Chart Showing Bookings by Program**

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

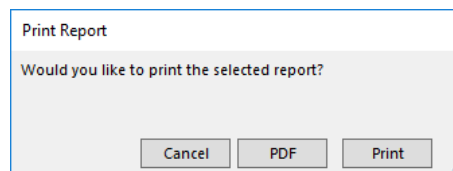
1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Summary of Bookings by Program** from the Print menu.



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... Summary of Bookings by Weekday and Instructor** from the Print menu.

**Produce Summary Report**

Edit Tools

**Specify Report Format**

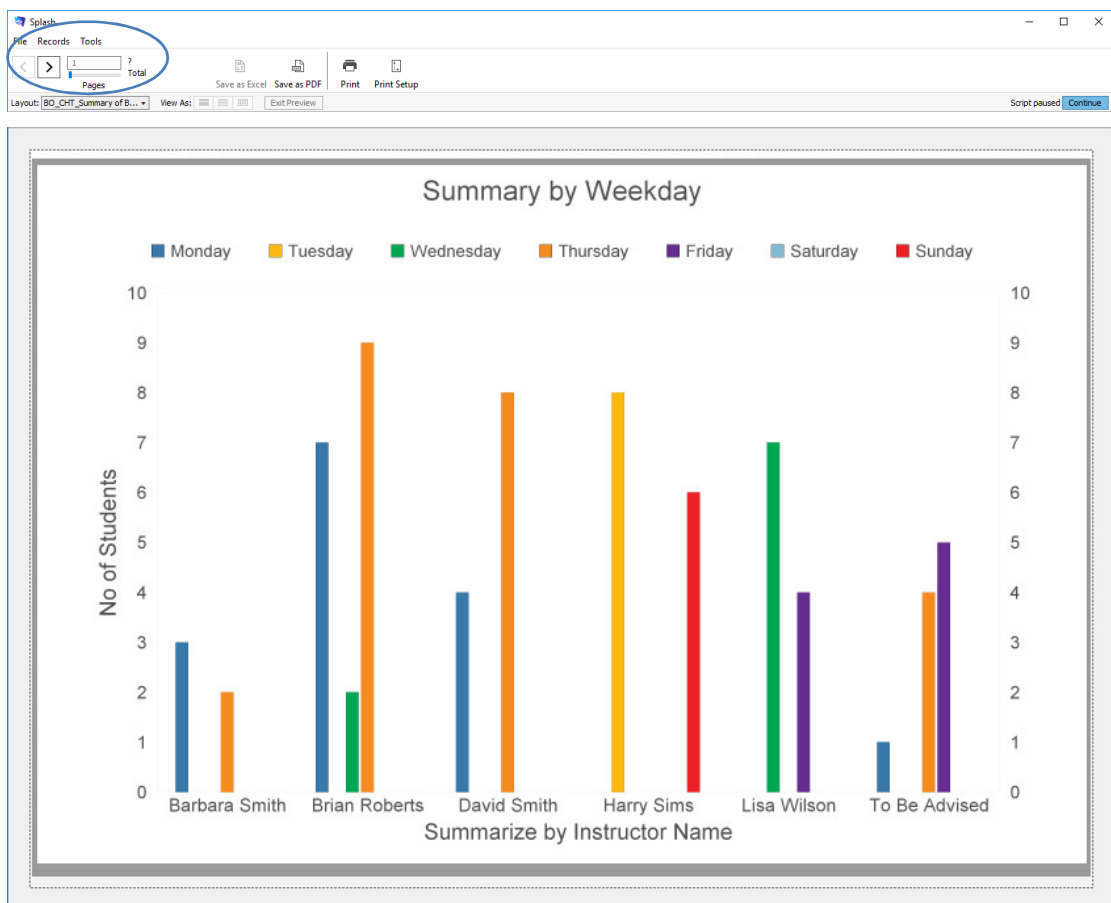
**Step 1 : Choose Existing Report Format**

Report Name Summary by Weekday

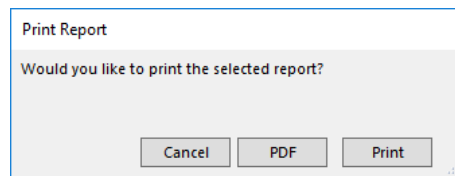
**Step 2: Choose/Update Report Summary Groups**

Group 1 Summarize by Instructor 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 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.



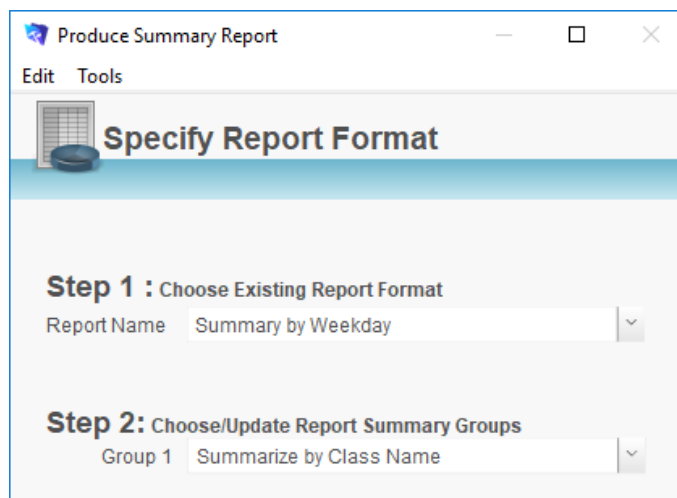
8. The **Print Report** dialog will be displayed on your screen.



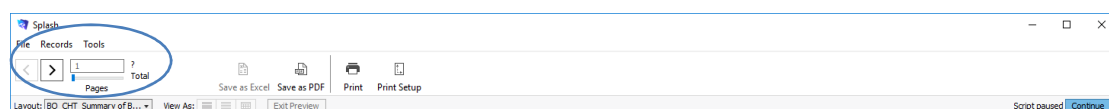
### ***Printing a Chart Showing Bookings by Weekday and Class Name***

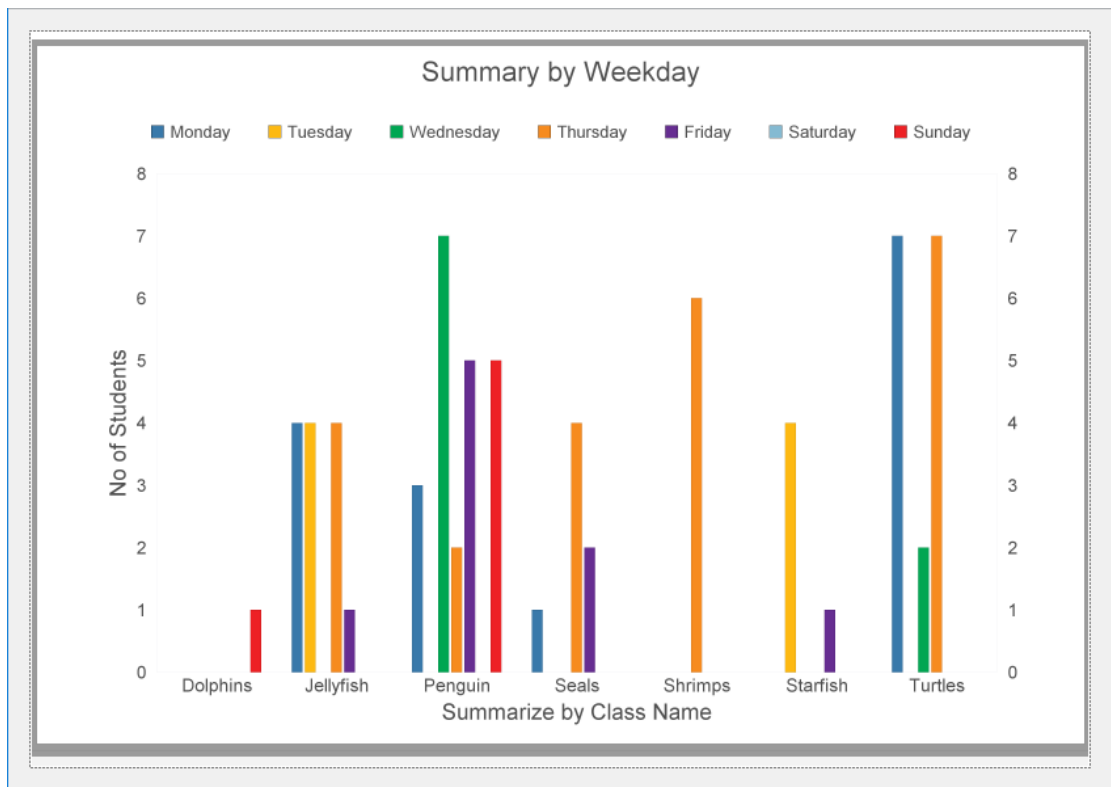
This report displays as a graph; it shows the number of bookings for each class name within each weekday for the found set of records.

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... Summary of Bookings by Weekday and Class Name** from the Print menu.

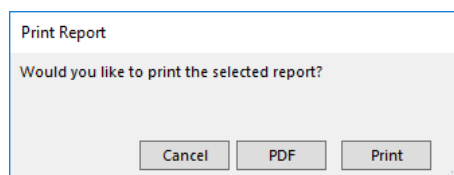


4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.  
Step 1 = Summary by Weekday  
Step 2 = Group 1 set to Summarize by Class Name  
Step 3 = Report Name set to Summary by Weekday.
6. Amend the grouping options at Step 2 if required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





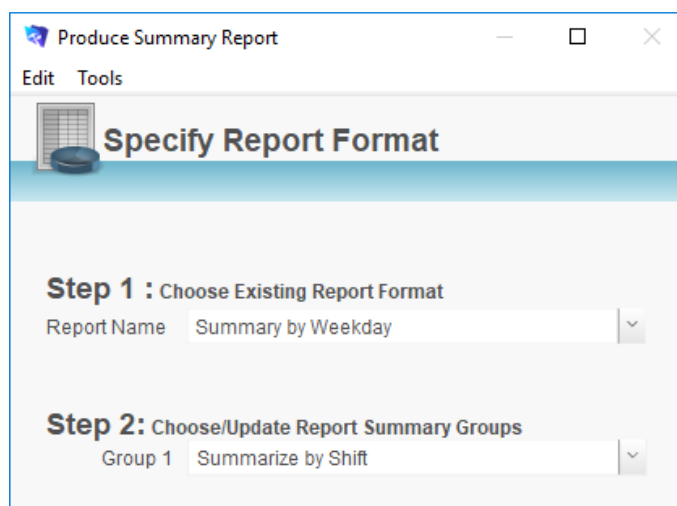
8. The **Print Report** dialog will be displayed on your screen.



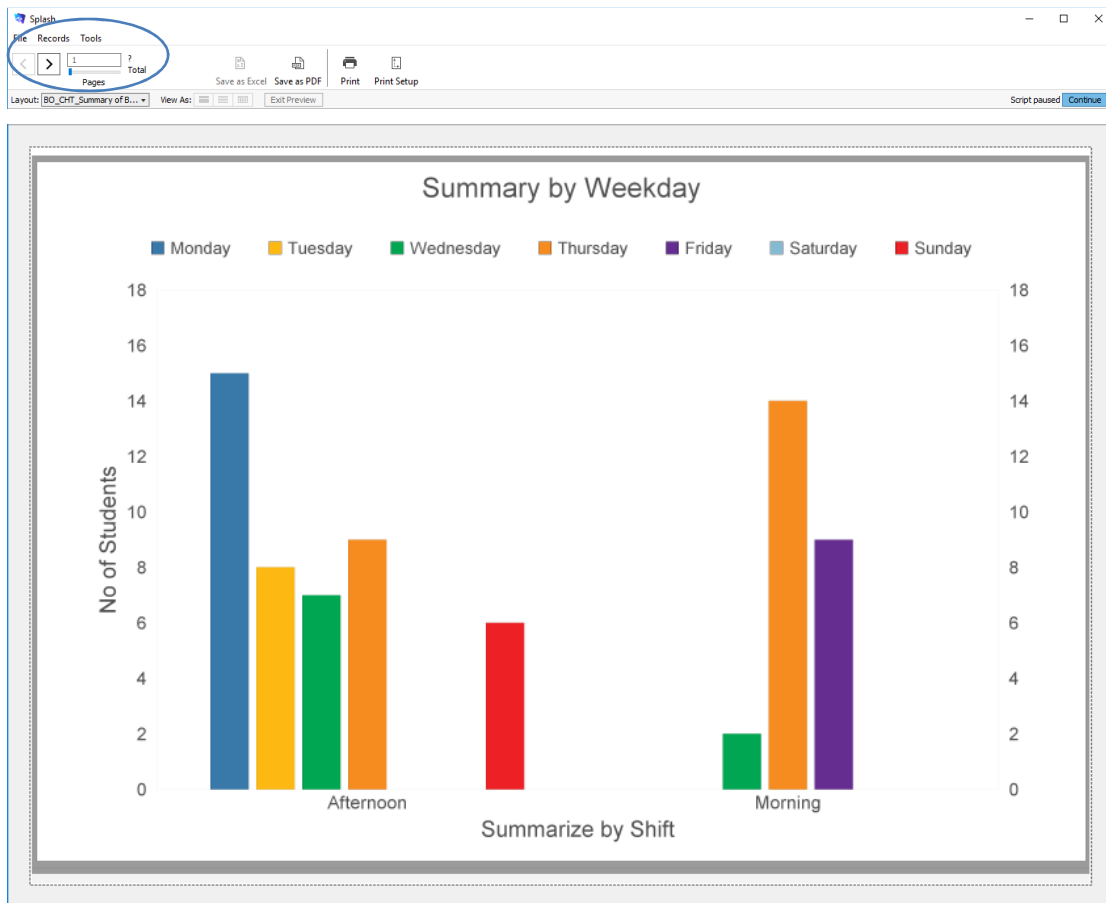
### *Printing a Chart Showing Bookings by Weekday and Shift*

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

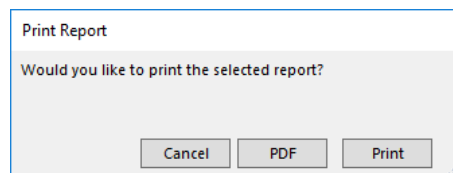
1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Summary of Bookings by Weekday and Shift** from the 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... Summary of Bookings by Weekday and Program** from the Print menu.



**Produce Summary Report**

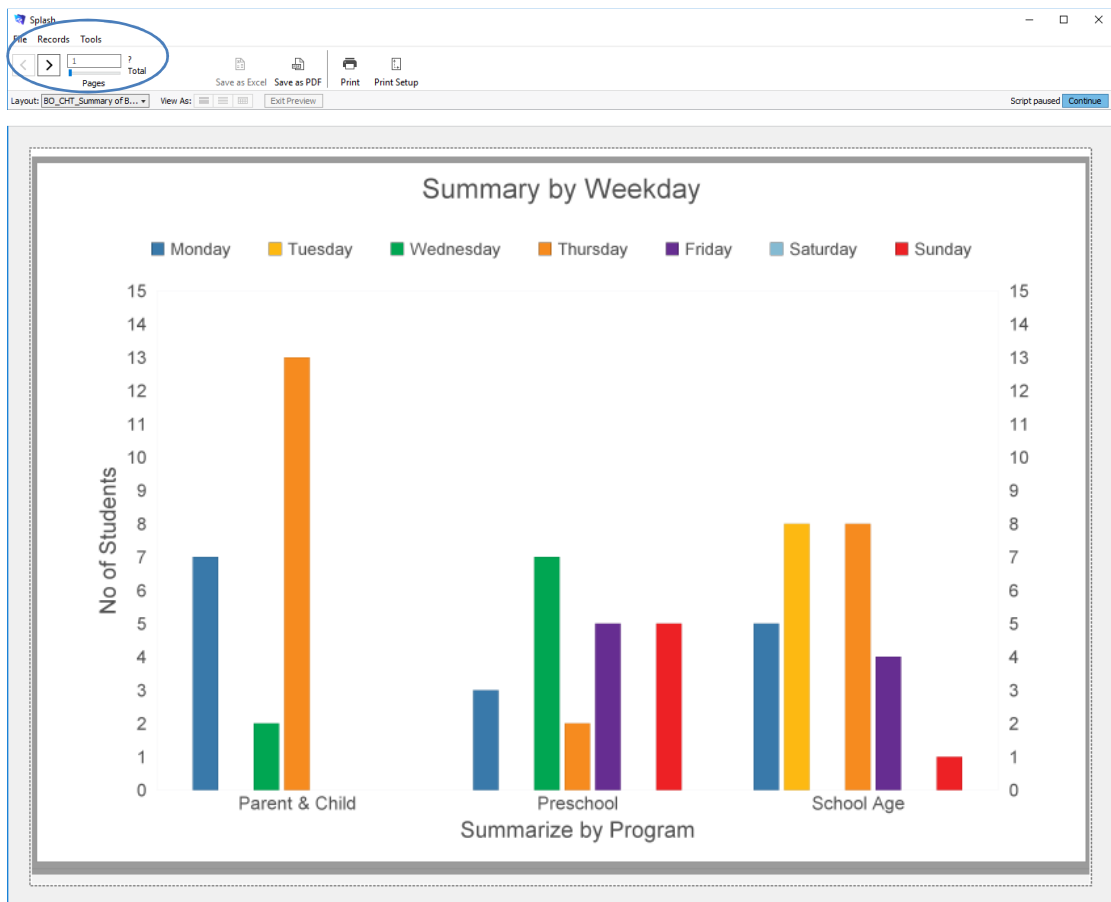
Edit Tools

**Specify Report Format**

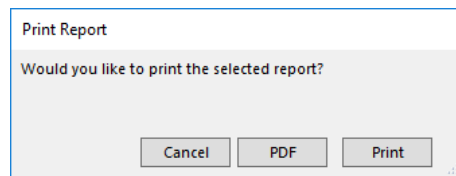
**Step 1 : Choose Existing Report Format**  
 Report Name Summary by Weekday

**Step 2: Choose/Update Report Summary Groups**  
 Group 1 Summarize by Program

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](http://www.merchantwarrior.com) to create your account.

After setting up your Merchant Warrior account you will be provided with account details. These details must be entered on the School Details page within Splash. Your account details provide login access to the merchant warrior system where your account details are held.

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 form is divided into several sections:

- School Name:** A text field with the placeholder 'Your Swim School Name Here'.
- Street Address:** Fields for Line 1, Line 2, Suburb, City (pre-filled with 'Wellington'), and Country (pre-filled with '61').
- Postal Address:** Fields for Line 1, Line 2, Suburb, City (pre-filled with 'Wellington'), and Country (pre-filled with '61').
- Website:** A text field.
- Logo:** A section with a 'Click Arrow to Insert Logo' button and a placeholder image.
- Contacts:** A tabbed section with 'Contact Details' and 'Accounts Contact' sub-sections. Each sub-section has fields for Full Name, Telephone, Mobile, and Email.
- Accepted Credit Cards:** Checkboxes for Visa, Mastercard, Diners, and AMEX. The 'Test Mode' checkbox is circled in red.
- Direct Debit Processing:** Fields for Account Name, Account Password, and API Phrase.

Arrows indicate the flow of information from the School Name and Address fields to the Direct Debit Processing section.

**NB:** Direct debit payments will not be processed while the system is in test mode.

**Family File** – In order to process either bank or credit card payments you must record the client's payment details on their family file in Splash Bookings you wish to process by direct debit must have "Yes" specified in the direct debit field. This information is copied from the family file at the time each booking is made. If you hold a payment authority for any family you must record the details. After setting the Payment Authority Held field to yes you will be asked to confirm the payment details. For privacy reasons full payment information is not displayed on screen.

**Splash Families** Today's Date: 2/2/2018

Filter By Family Name: Everyone ☐ Active

Display Family and Child

Family ID: 2 Status: Active

Family Name: Smith

Address: 6A Erlestoke Crescent

Churton Park Wellington 4001

Primary Contact: Name: Barbara Smith Relationship: Mother Email: barbara@computerize.co.nz

OK to Email: No OK to SMS: Yes

Telephone: Home: 063724713 Work: Work Telephone Mobile: 0272222082

Family Members:

Family Member	Age	Species
Jacob (Jake) Smith	5_6m	Penguin
Lucas Smith	5_6m	Penguin
Sam Smith	6_3m	Penguin
Nicholas Smith	6_3m	Turtles

Bookings:

Date	Invt ID	Amount
25/01/18	147324	Nicholas Smith - Turtles - 11:00 AM Thu (Block Jan 2018) \$50.00
25/01/18	147324	Lucas Smith - Penguin - 4:30 PM Mon (Block Jan 2018) \$75.00
25/01/18	147327	Lucas Smith - Penguin - 4:30 PM Mon (Block Jan 2018) -\$1.20
25/01/18	147327	Lucas Smith - Penguin - 4:30 PM Mon (Block Feb 2018) \$1.20
25/01/18	147330	Nicholas Smith - Turtles - 11:00 AM Thu (Block Jan 2018) -\$5.45
25/01/18	147330	Nicholas Smith - Turtles - 11:00 AM Thu (Block Feb 2018) \$5.45
17/01/18	147319	Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block Jun 2017) \$1.35
17/01/18	147319	Nicholas Smith - Turtles - 11:00 AM Thu (Term Jun 2017) \$59.40
17/01/18	147319	Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block Jul 2017) \$92.25
17/01/18	147319	Lucas Smith - Penguin - 4:30 PM Mon (Term Jul 2017) \$90.00
17/01/18	147319	Nicholas Smith - Turtles - 11:00 AM Thu (Term Jul 2017) \$59.40
9/11/17	147275	Jake Smith - Penguin - 3:30 PM Mon (Block Nov 2017) \$1.00
9/11/17	147276	Lucas Smith - Penguin - 4:30 PM Mon (Block Nov 2017) \$1.00
9/11/17	147277	Nicholas Smith - Turtles - 11:00 AM Thu (Block Nov 2017) \$1.00

Discount Rate: 5% Type: Percent

Payment Authority Held: Yes

Withdraw funds using Bank Debit

Account Number: #####

**Booking Record** – Payment by Direct Debit must be set to Yes, for a payment to be processed the booking balance must be greater than zero and the Next Payment Due amount must be defined.

**Splash Bookings** 28 January 2015

Filter By Student Name: Everyone ☐ Active

Block: 3 Year: 2014

Sort By: First Name

Student ID: 35 Name: David King Gender: M Age: 11\_10m Telephone: 05 678 4564

Medical:

Comments:

Catchup: No

Session: Booking Info Primary Contact

Class ID: DOL Class Name: Dolphins Class Level: 4 Programme: School Age Instructor: Brian Thomson Location: Main Pool Start Date: 9/2/2014 End Date: 23/4/2014 Start Time: 2:00 PM Weekday: Sunday Block: 1 Shift: Afternoon

Cost of Session: Cost Method: Cost Per Session: Cost Unit: \$10.00 No. of Sessions: 10 Total Cost: \$100.00 Payment Required By: 9/2/2014

Attendance and Payments:

Student Attendance:

Date	Amount
9/2/2014	
16/2/2014	
23/2/2014	
2/3/2014	
9/3/2014	
16/3/2014	
23/3/2014	
30/3/2014	
6/4/2014	
13/4/2014	
20/4/2014	

Payments by Direct Debit: ☒ Yes

Next Payment Due: \$

Payments Received:

Date	Amount
26/04/14	146776 Lesson -\$90.00

Cost of Booking:

Initial Cost: \$100.00

Discount Rate: 10% Type: Percent Discount Applied: \$10.00

Credit Due: Credit Taken:

Value of Free Lessons:

Exit Value Written Off:

Late Payment Fee:

Payments Received: -\$90.00

Balance Due: \$180.00

Locate Family's Bookings with a Balance

Additional documentation is available to support direct debit processing; it includes processes for 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 payments tab card.

Splash Families Today's Date: 2/2/2018

Filter By Family Name: Everyone ☐ Active

Display Family and Child

Family ID: 2 Status: Active

Family Name: Smith

Address: 6A Eriestoke Crescent  
Churton Park  
Wellington 4001

Primary Contact: Name: Barbara Smith Relationship: Mother Email: barbara@computerize.co.nz

Telephone: Home: 063724713 Work: Work Telephone Mobile: 0272222082

Family Members:

Family Member	Age	Species
Jacob (Jake) Smith	5_6m	Penguin
Lucas Smith	5_6m	Penguin
Sam Smith	6_3m	Penguin
Nicholas Smith	6_3m	Turtles

Bookings:

Date	Inv ID	Amount
25/01/18	147324	Nicholas Smith - Turtles - 11:00 AM Thu (Block Jan 2018) \$50.00
25/01/18	147324	Lucas Smith - Penguin - 4:30 PM Mon (Block Jan 2018) \$75.00
25/01/18	147327	Lucas Smith - Penguin - 4:30 PM Mon (Block Jan 2018) -\$1.20
25/01/18	147327	Lucas Smith - Penguin - 4:30 PM Mon (Block Feb 2018) \$1.20
25/01/18	147330	Nicholas Smith - Turtles - 11:00 AM Thu (Block Jan 2018) -\$5.45
25/01/18	147330	Nicholas Smith - Turtles - 11:00 AM Thu (Block Feb 2018) \$5.45
17/01/18	147319	Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block Jun 2017) \$1.35
17/01/18	147319	Nicholas Smith - Turtles - 11:00 AM Thu (Term Jun 2017) \$59.40
17/01/18	147319	Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block Jul 2017) \$92.25
17/01/18	147319	Lucas Smith - Penguin - 4:30 PM Mon (Term Jul 2017) \$90.00
17/01/18	147319	Nicholas Smith - Turtles - 11:00 AM Thu (Term Jul 2017) \$59.40
9/11/17	147275	Jake Smith - Penguin - 3:30 PM Mon (Block Nov 2017) \$1.00
9/11/17	147276	Lucas Smith - Penguin - 4:30 PM Mon (Block Nov 2017) \$1.00
9/11/17	147277	Nicholas Smith - Turtles - 11:00 AM Thu (Block Nov 2017) \$1.00

Payment Authority Held: Yes

Withdraw funds using Bank Debit

Account Number: ###-###-#####

3. Change Payment Authority Held field to Yes.
4. You will be asked to define the payment method for the selected family. Choose Credit Card or Bank Debit.

Specify Payment Type

Will you be making the deduction directly from the clients BANK or from the clients CREDIT CARD?

Cancel Credit Card Bank Debit

5. The next dialog to be displayed is dependent upon your previous choice. Either the Enter Bank Details dialog box or the Enter Credit Card Details dialog box will be displayed on your screen. You must complete all fields in the dialog displayed. Follow the onscreen prompt for the number of characters in each field.

Enter Bank Details

Enter Bank Details

BSB (6 characters)

123-456

Account Number (min 4 and max 9 characters)

123456789

Cancel OK

Enter Credit Card Details

Enter Credit Card Details

Name on Card

B G Smith

Card Number (16 char)

1234123412341234

Expiry (MMYY)

0618

Cancel OK

6. Click OK to save the bank details and return to the family file.
7. When entered sample debit information will be displayed.

Payment Authority Held: Yes

Withdraw funds using Bank Debit

Account Number: ###-###-#####

Payment Authority Held: Yes

Withdraw funds using Credit Card

Name: B G Smith

XXXX-1234

Exp: 0618

## 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.

Payment Authority Held <input type="button" value="Yes"/>	Payment Authority Held <input type="button" value="Yes"/>
Withdraw funds using Bank Debit	Withdraw funds using Credit Card
Account Number ### ##	Name: B G Smith
	XXX-1234
	Exp: 0617
<b>BSB Missing</b>	<b>Card Expired 0617</b>

1. Use the **Finding a Family** function to display the Search for a Family dialog.
2. When the Search for a Family dialog is displayed simply enter \* in the Payment Details Missing field.
3. Click the Find Now button

**Search for a Family**

Family ID:  Status:

Family Name:  Family Alert Message:

Address:

Email:  OK to Email:  OK to SMS:

**Contact Details**

Primary Contact Name:  Phone (Hm):  Phone (Mobile):  Phone (Default):

Other Contact Name:

Emergency Contact Name:

Payment Details	Referral & Exit	Custom Fields
Discount Rate: <input type="text"/>		First Swim Date: <input type="text"/>
Discount Type: <input type="text"/>		Last Swim Date: <input type="text"/>
Payment Authority Held: <input type="text"/>		Total Family Bookings: <input type="text"/>
Payment Type: <input type="text"/>		Outstanding Balance: <input type="text"/>
Credit Card Expiry Date: <input type="text"/>		
Payment Details Missing: *		

Buttons: Cancel, New Request, Omit Records, Constrain Set, Extend Set, Find Now

## 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 the direct debit and a payment cannot 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 entered on the family file

Take Payment by Credit Card   Next Payment Due

**NB:** Place your cursor over the warning symbol to see a description of the error.

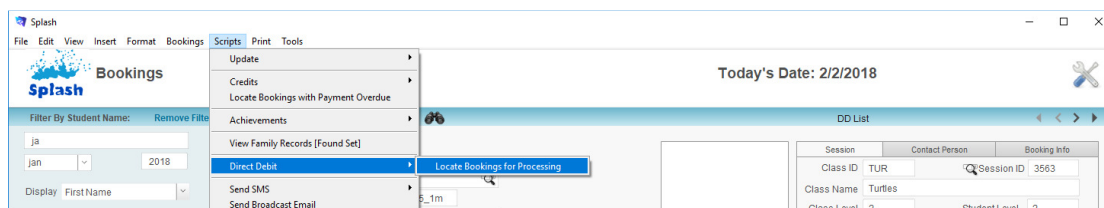
## Locating Payments for Direct Debit Processing

Payments for bank debit are processed separately to payments by credit card. You will be asked to specify the payment type during this process.

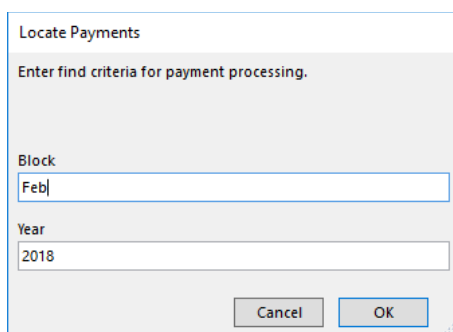
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



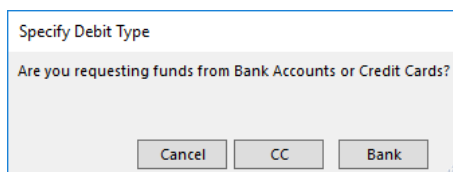
3. The Booking data entry screen will be displayed.
4. Choose **Direct Debit... Locate Bookings for Processing** from the scripts menu.



5. The Locate Payments dialog will be displayed on your screen. Enter the term and year for processing. Click the OK button.



6. The Specify Debit Type dialog will be displayed on your screen. Select either CC or Bank.



7. Splash will locate all bookings for the selected payment type within the nominated term. Only bookings which have an outstanding balance will be displayed on your screen.

Splash

File Edit View Insert Format Bookings Scripts Print Tools

Splash

Bookings

Today's Date: 2/2/2018

Sort By

First Name

ID	Student Name	Age	Class Name	Weekday	Start Date	Payment by	Amount	Block	Year	Balance Due	Processed	Response
160	Paula Schwass	5_1m	Turtles	Monday	5/2/18	CC	\$13.50	Feb	2018	\$54.00		
160	Paula Schwass	5_1m	Turtles	Monday	5/2/18	CC	\$13.50	Feb	2018	\$54.00		
162	Lucas Smith	5_8m	Penguin	Monday	5/2/18	DD	\$18.45	Feb	2018	\$72.60	BSB Missing	
13	Jacob (Jake) Smith	5_6m	Penguin	Wednesda	7/2/18	DD	\$18.45	Feb	2018	\$73.80	BSB Missing	
15	Sam Smith	6_3m	Penguin	Wednesda	7/2/18	DD	\$20.19	Feb	2018	\$80.77	BSB Missing	
65	William Jessop	4_10m	Turtles	Thursday	1/2/18	CC	\$13.50	Feb	2018	\$54.00		
17	Nicholas Smith	6_3m	Turtles	Thursday	1/2/18	DD	\$14.85	Feb	2018	\$53.95	BSB Missing	
2035	peter jessop	3_0m	Penguin	Sunday	4/2/18	CC	\$20.50	Feb	2018	\$82.00		

## Resetting the Next Payment Amount

Default payments are defined in your preferences file as either the lesson cost or the block cost. This command resets all payment amounts to the default amount.

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.
2. When the list of bookings for processing is displayed on your screen choose **Direct Debit... Reset Payment Amount** from the scripts menu.

Splash

File

Edit

View

Insert

Format

Bookings

Scripts

Print

Tools

Splash

Bookings

Sort By

First Name

ID

Student Name

160

Paula Schwass

160

Paula Schwass

162

Lucas Smith

13

Jacob (Jake) Smith

15

Sam Smith

65

William Jessop

17

Nicholas Smith

2035

peterjessop

Update

Credits

Locate Bookings with Payment Overdue

Achievements

View Family Records (Found Set)

Direct Debit

Send SMS

Send Broadcast Email

Roll Over Bookings to Next Block

Export Booking Data

Export Booking Balance

Start Date

Payment by

Amount

Block

Year

Balance Due

5/2/18

CC

\$13.50

Feb

2018

\$54.00

Locate Bookings for Processing

Reset Payment Amount

Locate Direct Debit Errors

Print Direct Debit Schedule

Process Direct Debit Payments

\$13.50

Feb

2018

\$54.00

\$18.45

Feb

2018

\$72.60 BSB Missing

\$18.45

Feb

2018

\$73.80 BSB Missing

\$20.19

Feb

2018

\$80.77 BSB Missing

1/2/18

CC

\$13.50

Feb

2018

\$54.00

6\_3m

Turtles

Thursday

1/2/18

DD

\$14.85

Feb

2018

\$53.95 BSB Missing

3\_0m

Penguin

Sunday

4/2/18

CC

\$20.50

Feb

2018

\$82.00

Today's Date: 2/2/2018

Processed

Response

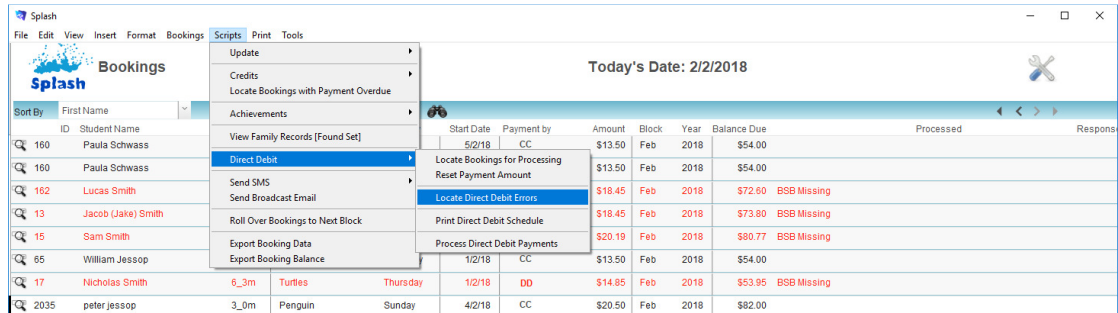
3. Splash will now process your request.



## Locate Bookings With Direct Debit Errors

Perform this function in order to locate any bookings which contain direct debit errors.

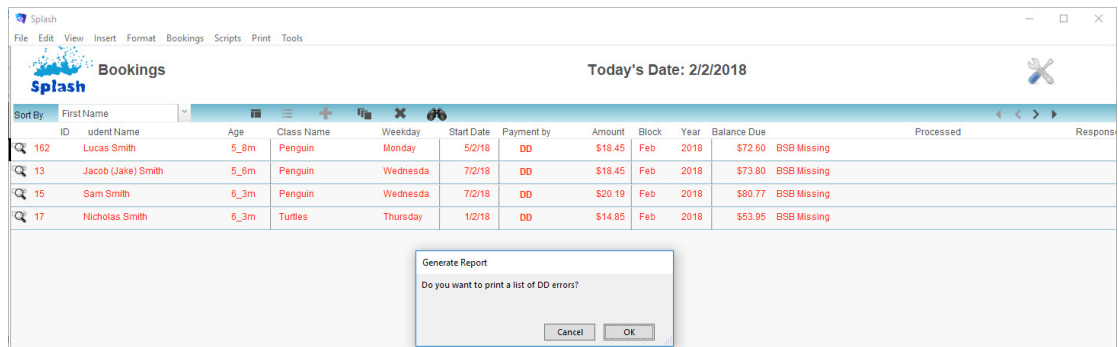
1. Ensure the Direct Debit list is displayed on your screen.
2. Choose **Direct Debit... Locate Direct Debit Errors** from the scripts menu.



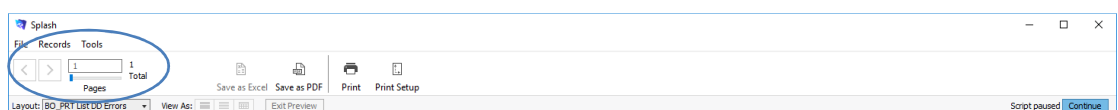
3. The Locate Payments dialog will be displayed on your screen. Enter the term and year for processing. Click the OK button.

The 'Locate Payments' dialog box is shown. It has a title bar 'Locate Payments' and a subtitle 'Enter find criteria for payment processing.' Below this, there are two input fields: 'Term' with 'Feb' entered and 'Year' with '2018' entered. At the bottom, there are 'Cancel' and 'OK' buttons.

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.

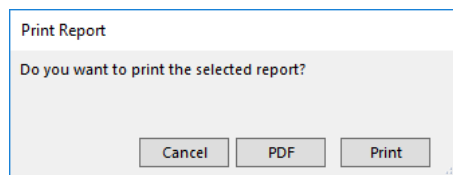


5. Click OK to preview the report or Cancel to return to the list of bookings.
6. If you have selected OK (above) the report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** 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 2/2/2018				
		DD Amt	Balance	
Smith (Barbara Smith)				
Jacob (Jake) Smith	Penguin	\$18.45	\$73.80	BSB Missing
Lucas Smith	Penguin	\$18.45	\$72.80	BSB Missing
Nicholas Smith	Turtles	\$14.85	\$53.95	BSB Missing
Sam Smith	Penguin	\$20.19	\$80.77	BSB Missing
<b>Total Due as at 2/2/2018</b>		<b>\$71.94</b>		

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



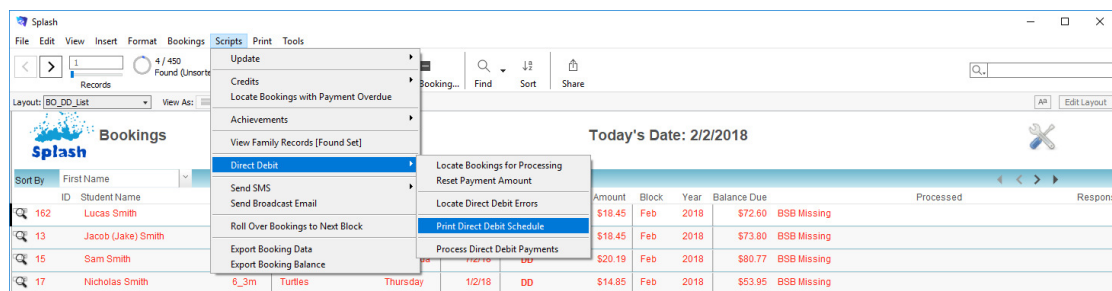
## Printing the Direct Debit Schedule

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.

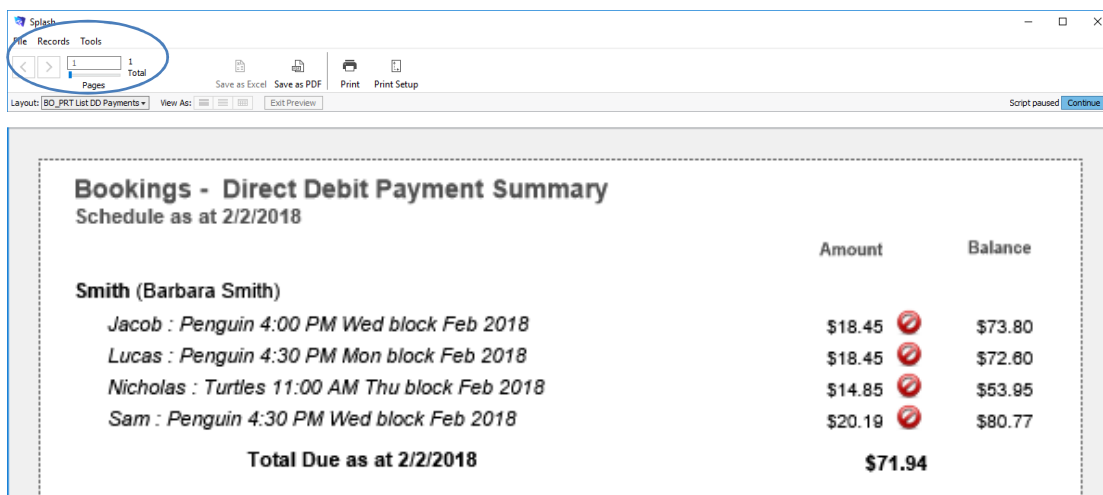
- Click once on the Splash icon on the top left corner of your screen.
- Select the Booking icon



- The Booking data entry screen will be displayed.
- Choose **Direct Debit... Locate Bookings for Processing** from the scripts menu.
- The Locate Payments dialog will be displayed on your screen. Enter the term and year for processing. Click the OK button.
- The list of bookings for processing will be displayed on your screen.
- Choose **Direct Debit... Print Direct Debit Schedule** from the scripts menu.

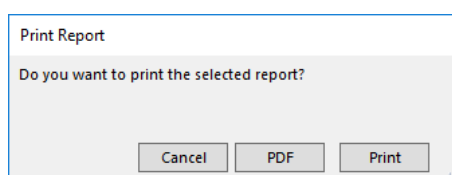


- The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



	Amount	Balance
<b>Smith (Barbara Smith)</b>		
Jacob : Penguin 4:00 PM Wed block Feb 2018	\$18.45	\$73.80
Lucas : Penguin 4:30 PM Mon block Feb 2018	\$18.45	\$72.60
Nicholas : Turtles 11:00 AM Thu block Feb 2018	\$14.85	\$53.95
Sam : Penguin 4:30 PM Wed block Feb 2018	\$20.19	\$80.77
<b>Total Due as at 2/2/2018</b>	<b>\$71.94</b>	

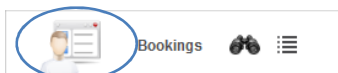
9. The **Print Report** dialog will be displayed on your screen.



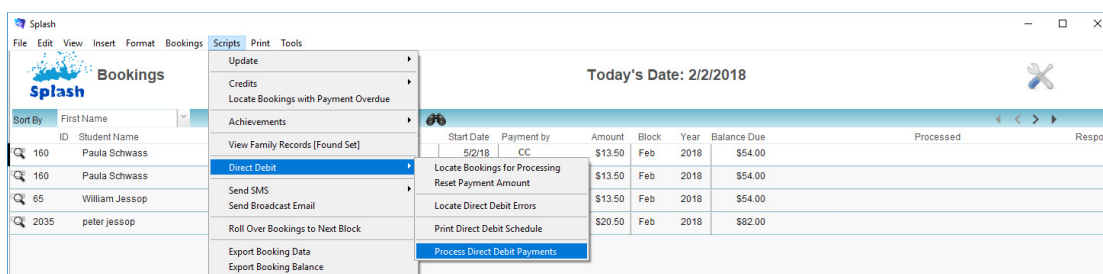
## Processing Your Direct Debit Payments

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.



Start Date	Payment by	Amount	Block	Year	Balance Due	Processed	Response
5/2/18	CC	\$13.50	Feb	2018	\$54.00		
		\$13.50	Feb	2018	\$54.00		
		\$13.50	Feb	2018	\$54.00		
		\$20.50	Feb	2018	\$82.00		

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 Next Payment Amount.

The screenshot shows the 'Splash Bookings' application window. The top menu bar includes File, Edit, View, Insert, Format, Bookings, Scripts, Print, and Tools. The main window is divided into several sections:

- Filter By Student Name:** A search bar with 'ja' entered and a dropdown menu showing 'Feb' and '2018'. Below this is a list of students with columns for Name, Initials, and Status.
- Student Information:** Fields for Student ID (160), Name (Paula Schwass), Gender (Female), Age (5\_1m), Medical (Asthma), Contact (Robyn Schwass), and Telephone (0272222082). There is also a 'Comments' text area.
- DD List (Direct Debit List):** A table showing session details:
 

Session	Contact Person	Booking Info
Class ID: TUR	Session ID: 3563	
Class Name: Turtles		
Class Level: 2	Student Level: 2	
Programme: Parent & Child		
Instructor: Brian Roberts		
Location: Learners Pool	No. of Lessons: 4	
Start Date: 5/2/2018	End Date: 26/2/2018	
Start Time: 3:30 PM	Weekday: Monday	
Block: Feb	Year: 2018	Shift: Afternoon
- Payments and Cost of Booking Summary:**
  - Student Attendance:** A table with dates (5/2/2018, 12/2/2018, 19/2/2018, 26/2/2018) and dropdown menus.
  - Cost of Booking:**

Item	Amount
Initial Cost	\$60.00
Discount Applied	\$6.00
Credit Applied	
Value of Free Lessons	\$0.00
Exit Value Written Off	
Late Payment Fee	\$0.00
Payments Received	\$0.00
Balance Due	\$54.00
Next Payment Due	\$13.50

A blue arrow points to the green dollar sign icon next to the 'Next Payment Due' amount of \$13.50.