

Splash V7

User Documentation

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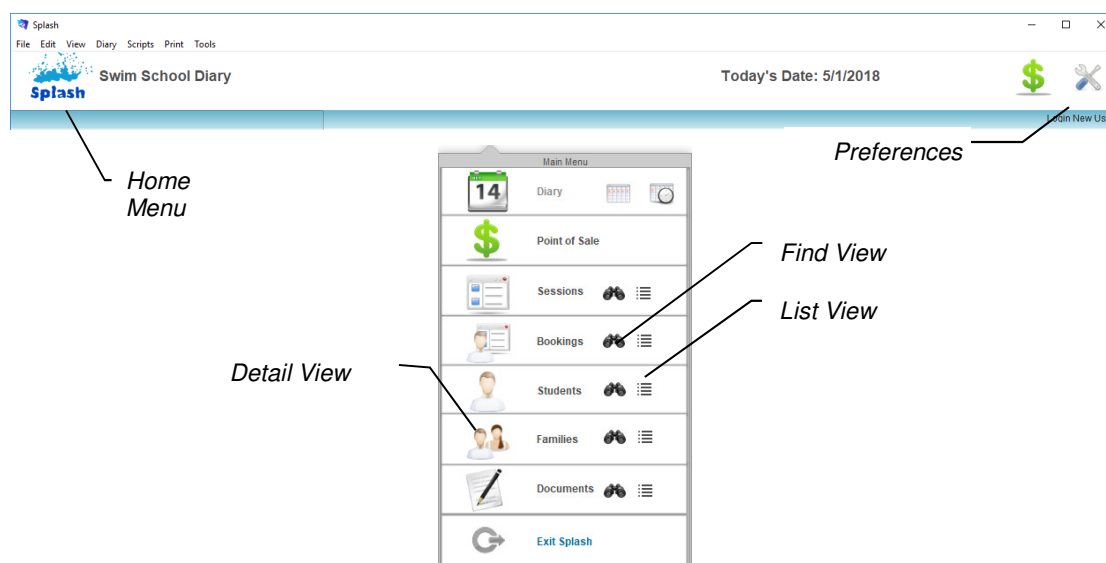
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The Splash Database

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



Diary

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

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

Point of Sale (POS)

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

Sessions

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

Bookings

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

Students

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

Families

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

Documents

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

Preferences

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

This module is divided into the following sections:

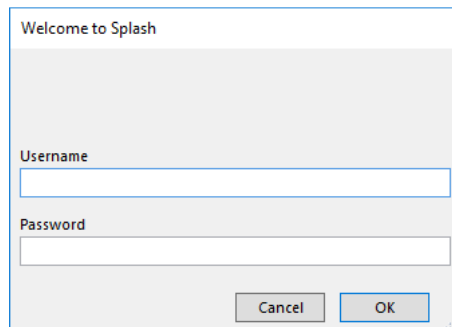
1. Class Levels
2. Classes,
3. Instructors
4. Document Templates,
5. School Details
6. System Defaults
7. Users.

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

Logging On

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

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

A screenshot of the 'Welcome to Splash' login window. It features a title bar with the text 'Welcome to Splash'. Below the title bar, there are two text input fields: the first is labeled 'Username' and the second is labeled 'Password'. At the bottom right of the window, there are two buttons: 'Cancel' and 'OK'.

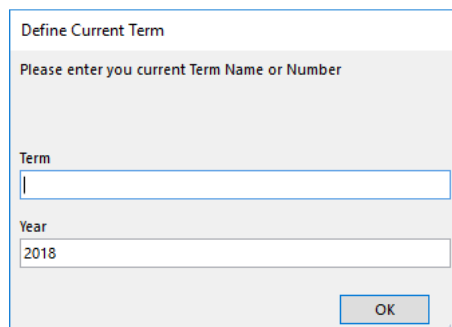
4. When you have successfully logged on the diary will be displayed on your screen.

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

Optional Login Parameters

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

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

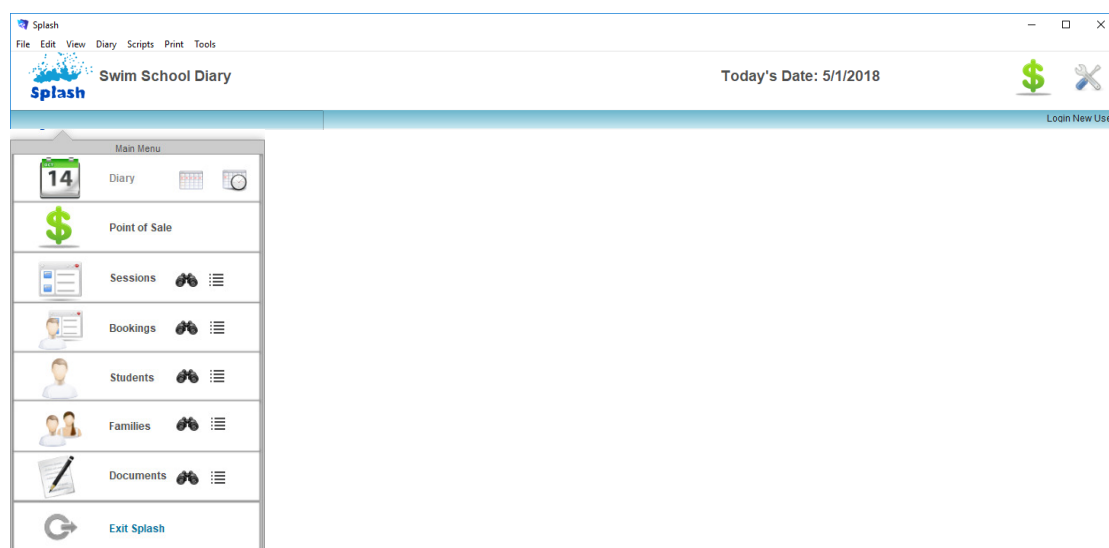
A screenshot of the 'Define Current Term' dialog box. It has a title bar with the text 'Define Current Term'. Below the title bar, there is a prompt: 'Please enter your current Term Name or Number'. There are two text input fields: the first is labeled 'Term' and is currently empty; the second is labeled 'Year' and contains the text '2018'. At the bottom right of the dialog box, there is an 'OK' button.

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

Database Navigation and Data Entry

Database Navigation

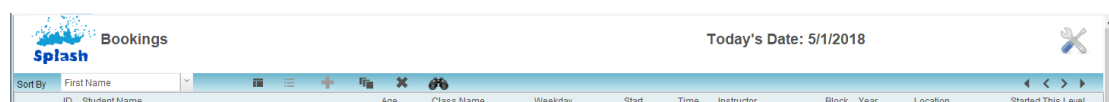
Navigating in Splash is performed via menu commands, keyboard commands, and onscreen button commands.



The Home Menu

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

Title Bar Buttons



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

Show All Records

View Previous Record

View Next Record



Find Record/s

The Magnifier

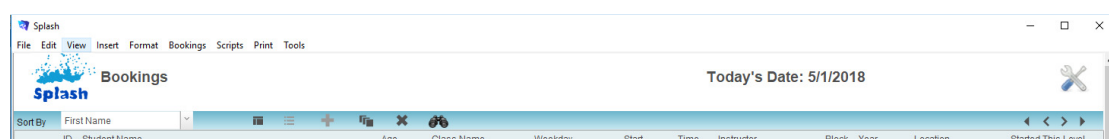


Click magnifier icon to display more detail about the selected line e.g. clicking the magnifier beside a student will display detailed student information.

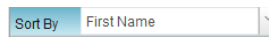
NB: Holding down the SHIFT or CONTROL key while clicking the magnifier can produce different results.

List View Buttons

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



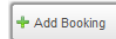
Sorting in List View



Displayed on the top left of all list view screens, the Sort By field provides the ability to perform either a custom sort, or a predefined sort of the current set of records. Click the **Sort By** button to perform a custom sort or select a predefined sort order from the drop-down menu provided.

Function Buttons

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



Moving From One Field to the Next

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

Entering Information

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

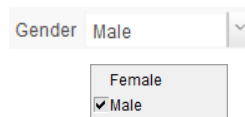
1. Text

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



2. Menu

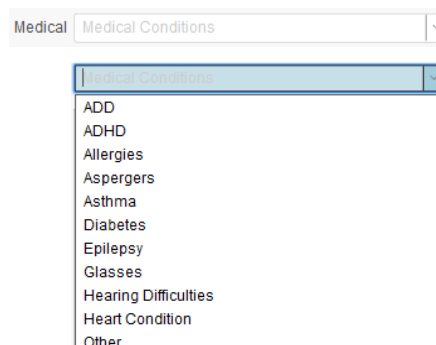
A menu will automatically be displayed when you tab into (or click in) a field. To choose from the list, click on the menu choice you require. When a menu is displayed you can only select from the list provided.



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

3. Drop-down List

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



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

4. Radio Button

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

Telephone	
Home	Home Telephone <input type="radio"/>
Work	Work Telephone <input type="radio"/>
Mobile	0272222082 <input checked="" type="radio"/>

5. Calendar

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

January 2018						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

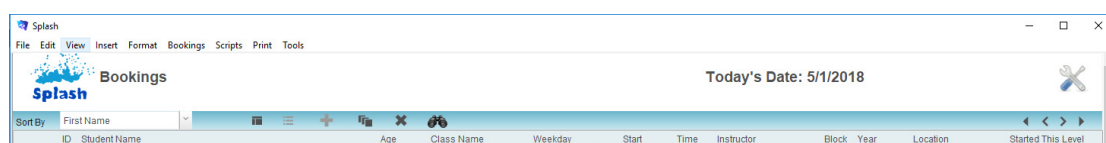
Today: 5/01/2018

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

Sorting a Group of Records

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

Sorting Records in List View

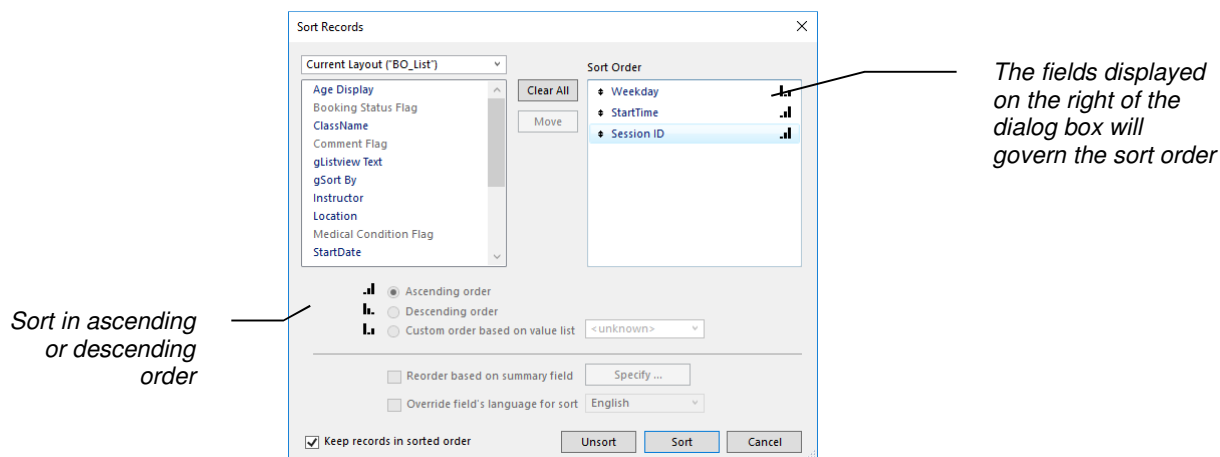


1. Quick sort options have been predefined within each module. Access the quick sort options for the selected screen by clicking once on the drop-down menu to the right of the Sort By button.

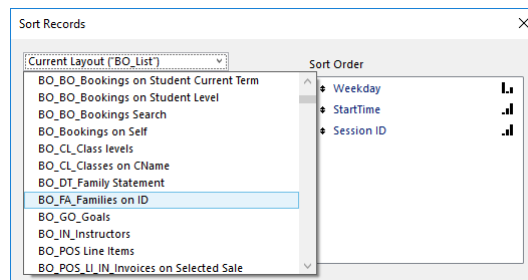
Sorting Records in Form View

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

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



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



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

Using Search Portals

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

Bookings Portal

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

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

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

Sessions Portal

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

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

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

Students Portal

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

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

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

Splash Bookings

Filter By Student Name:

Everyone

Jan

2018

Display Last Name

ANDERSON Sally	SHR	Th
APOLLO Anthony	TUR	Th
APOLLO Peter	SHR	Th
BUCHANAN Gareth	JEL	Tu
FAIRBROTHER Paul	SEA	Th
HARGREAVES Gregory	STA	Tu
HARPER Robert	TUR	Th
HUGHSON Hayden	TUR	W
JESSOP William	TUR	Th
JONES Billy	TUR	Mo
JONES Joanne	TUR	Mo
JONES Joanne	TUR	Th
KIMBLE Janet	STA	Tu
KING Craig	SEA	Th
KING David	PEN	Fri
LARSEN Nicholas	JEL	Tu
MCARTHUR Jack	SEA	Th
MCDUGAL Hamish	SEA	Th
NIGHTINGALE Sarah	SHR	Th
PATTERSON debra	JEL	Th
PEARSON stuart	PEN	Fri
SCHWASS Paula	TUR	Mo
SINCLAIR Jessica	SHR	Th
SMITH Jacob (Jake)	PEN	Th
SMITH Jacob (Jake)	PEN	W
SMITH Jennifer	JEL	Th
SMITH Lucas	PEN	Mo

Splash Sessions

Filter By:

All

All

Jan

2018

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

3:30PM	Turtles	Mo	BR
3:30PM	Jellyfish	Mo	DS
4:00PM	Turtles	Mo	BR
4:00PM	Penguin	Mo	BS
4:30PM	Seals	Mo	TB
4:30PM	Turtles	Mo	BR
4:30PM	Jellyfish	Mo	DS
4:30PM	Penguin	Mo	BS
5:00PM	Turtles	Mo	BR
5:00PM	Jellyfish	Mo	DS
5:00PM	Penguin	Mo	BS
5:15PM	Seals	Mo	TB
5:30PM	Turtles	Mo	BR
5:30PM	Jellyfish	Mo	DS
5:30PM	Penguin	Mo	BS
3:30PM	Jellyfish	Tue	HS
4:00PM	Jellyfish	Tue	HS
4:30PM	Jellyfish	Tue	HS
5:00PM	Starfish	Tue	HS
9:00AM	Turtles	We	BR
9:30AM	Turtles	We	BR
10:00A	Turtles	We	BR
10:30A	Turtles	We	BR
3:30PM	Penguin	We	L

Splash Students

Filter By Student Name: Remove Filter

Everyone

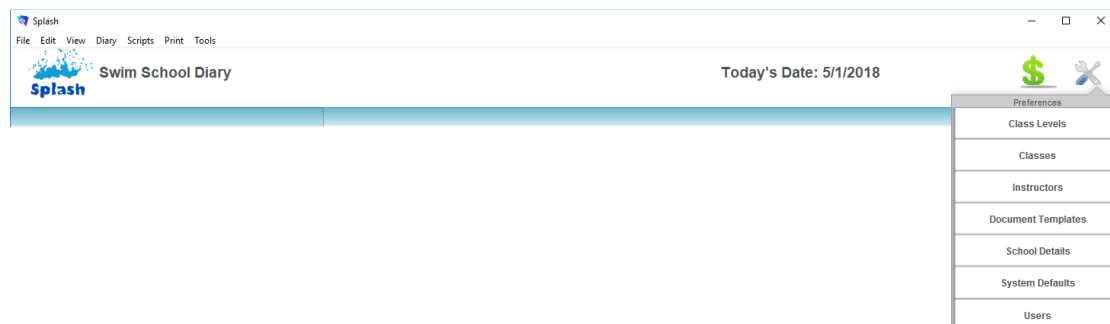
Display First Name

Amanda Brown	3_10m
Amanda zimmerman	2_3m
Amelia Anderson	2_7m
Amelia Harper	1_5m
Andy O'Donnell	5_10m
Ann Patterson	1_5m
Anthony Apollo	5_0m
Anthony Beauchamp	7_8m
Barry Robinson	3_11m
Benjamin Nightingale	2_2m
Benjamin Williams	4_3m
Billy Jones	5_8m
Bobby Brown	4_10m
Bobby Thomson	5_10m
brenda thomas	2_7m
Brendon Nightingale	4_2m
Bridgette Robinson	5_8m
Bruce Taylor	3_1m
Cameron McDougal	2_0m
Caroline Thomson	2_9m
Celia Brown	5_1m
Corey Morrison	4_1m
Craig King	9_5m
David King	3_10m
debra Patterson	8_5m
denise taylor	1_10m
Frederick Buchanan	3_1m
Gareth Buchanan	7_0m
Gaylene Patterson	5_7m

Defining Preference Settings

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

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



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

Class Levels

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

Classes

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

Instructors

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

Document Templates

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

School Details

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

System Defaults

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

Documents

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

Bookings

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

Student

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

Lists

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

Shifts

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

Public Holidays

Record upcoming public holidays so they are automatically assigned to attendance dates in each session as the sessions are created.

Custom Reports

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

Users

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

Defining Class Levels

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

Displaying Class Levels

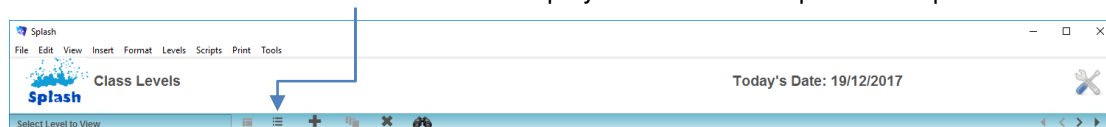
1. Click the **Preference** tools on the top right of your.
2. Select **Class Levels**.
3. The Class Level details will be displayed on your screen.

ID	Description	Abbrev Code
1	100m Freestyle	100 Fr
2	100m Backstroke	100 Bk
3	50m Breaststroke	50 br
4	Butterfly Arms	BF Arms

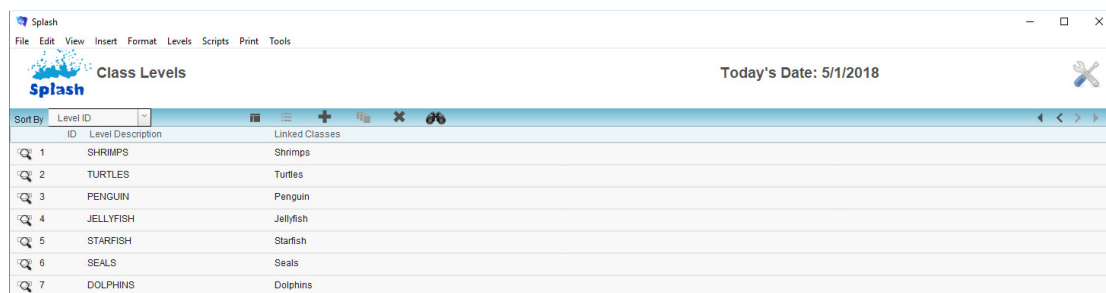
NB: Levels entered on this screen will be displayed in the level drop-down menu on the class entry screen. Assign the appropriate level to each class to ensure the correct goals are carried through to relevant bookings.

Displaying a List of Levels

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



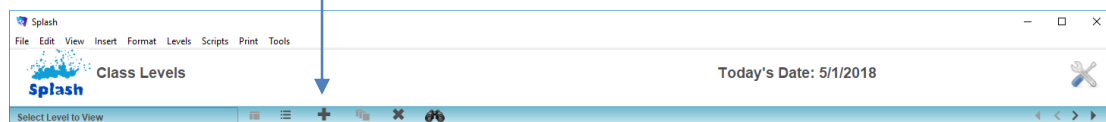
4. A list of class levels will be displayed on your screen.



NB: Return to the detail screen by clicking the magnifying glass to the left of the level ID.

Creating a New Class Level

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



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

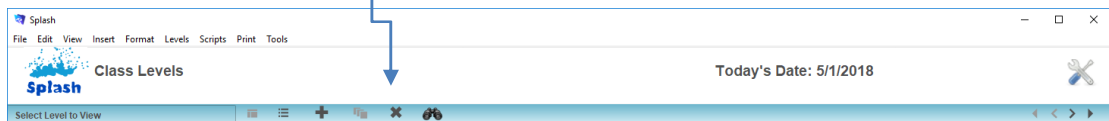
ID	Description	Abbrev Code
1	50m Freestyle	50Free
2	50m Backstroke	50Back
3		

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

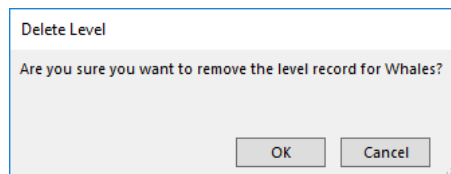
NB: Decimal numbers may be entered as level IDs.

Deleting a Class Level

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



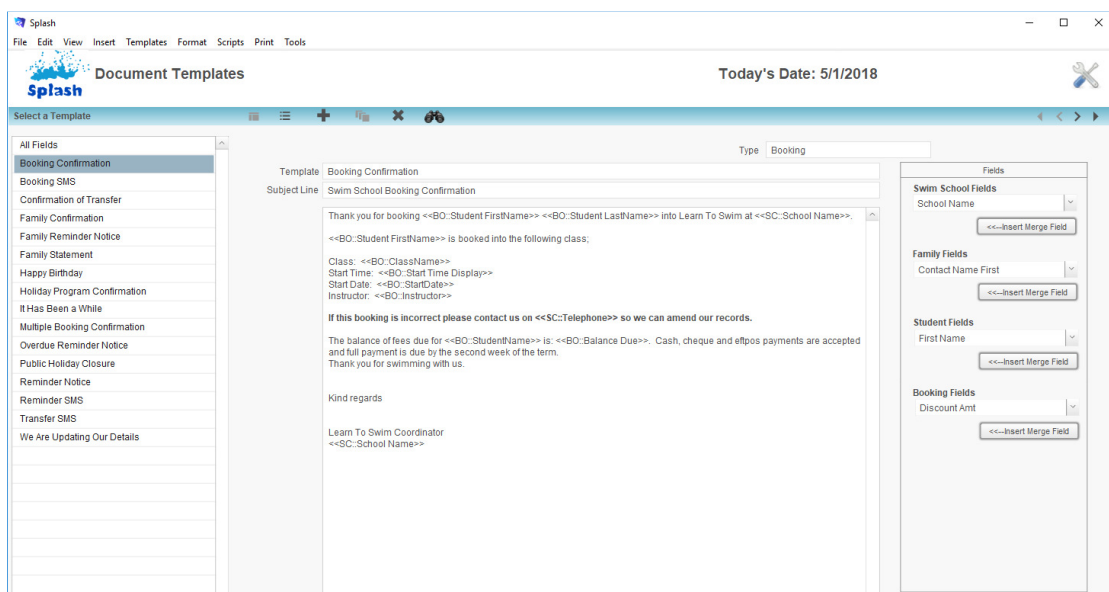
5. A dialog will be displayed asking you to confirm the selected level is to be deleted.



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

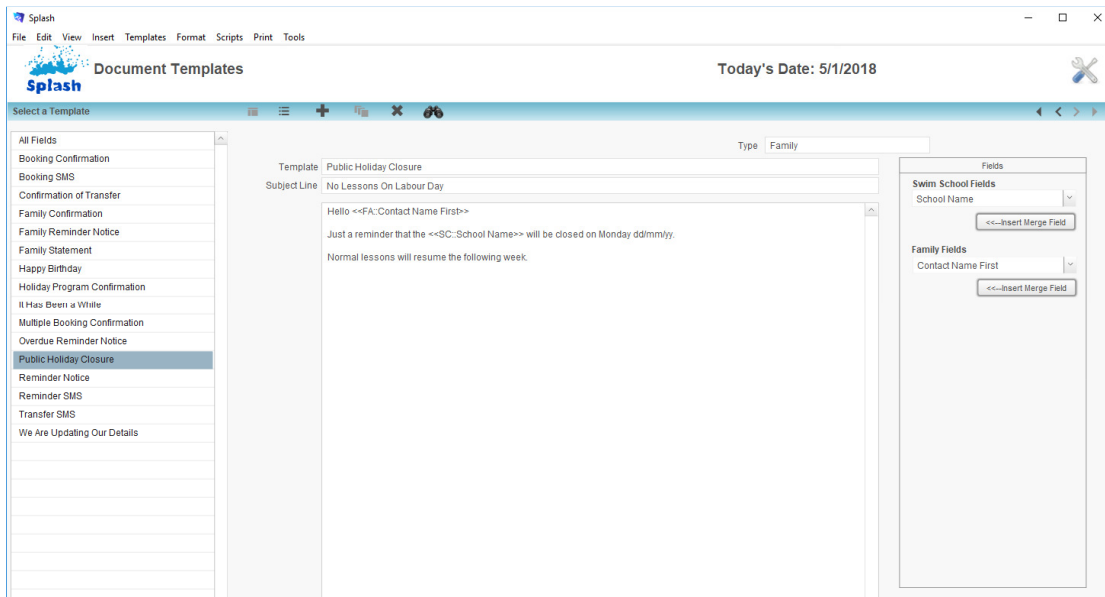
Defining Document Templates

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



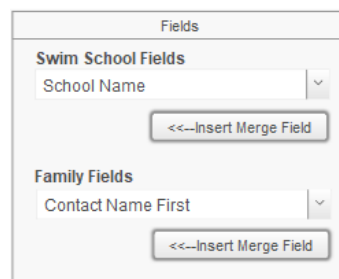
Creating a New Document Template

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



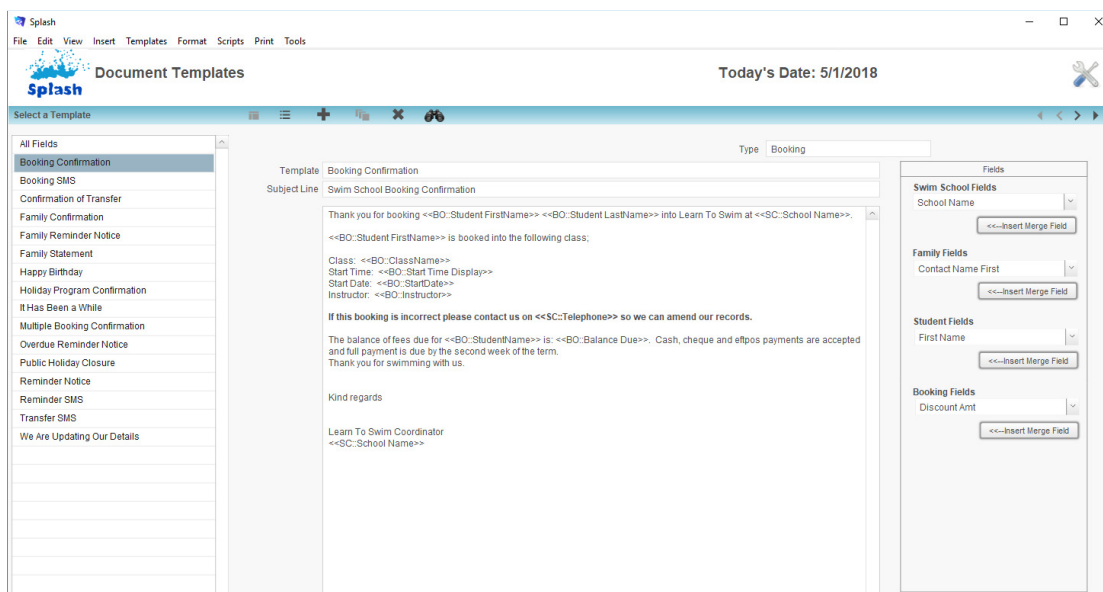
4. Enter a Template Name as well as the subject line and body text for your template.
5. Use the Type menu to define how the document should be personalised. Select Student if you wish to include personal information about the student, or family if you wish to include personal information about the family.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

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



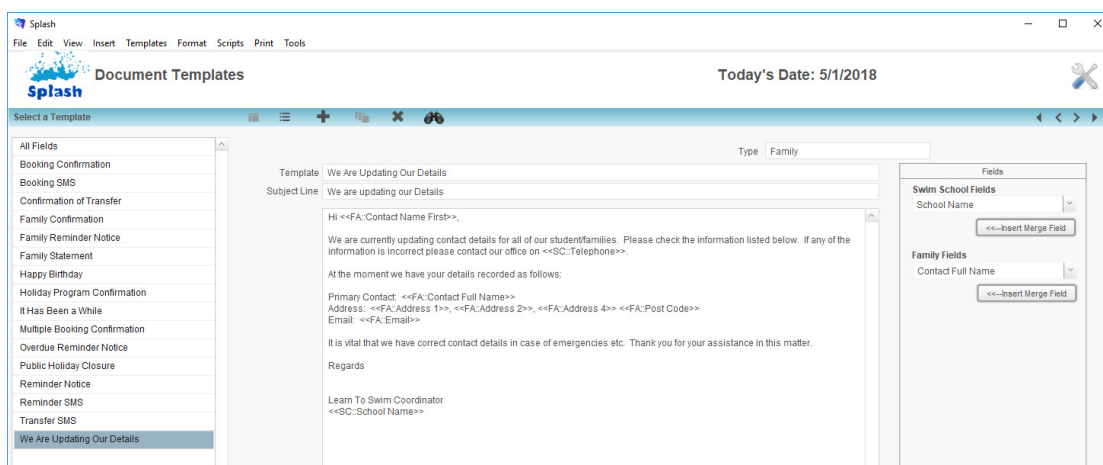
Editing a Document Template

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



Deleting a Document Template

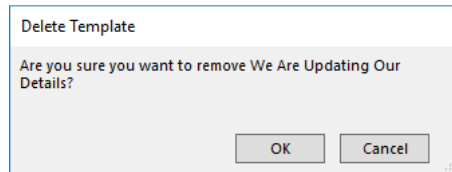
1. Click the **Preferences** tools on the top right of your screen.
2. Select **Document Templates**.
3. Using the portal on the left of the screen, click once on Template you wish to delete.
4. The portal row will be highlighted to indicate the active record. The information for the active template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



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



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



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

School Details

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

Updating School Details

- Click the **Preferences** tools on the top right of your screen.
- Select **School Details**.
- Enter your School Name and Address information.
- Click the **Contacts**, **Shifts** and **Document Default** tab cards to define additional information.

The screenshot shows the 'School Details' form with the following fields and sections:

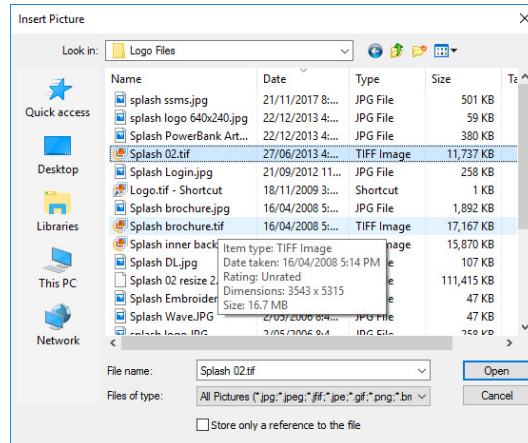
- School Name:** Your Swim School Name Here
- Street Address:** Line 1, Line 2, Suburb, City (Wellington), Country (61), Post Code
- Postal Address:** Line 1, Line 2, Suburb, City (Wellington), Country (61), Post Code
- Website:** [Empty field]
- Logo:** Click Arrow to Insert Logo (with a logo image)
- Contacts:** Contact Details (Full Name, Telephone, Mobile, Email)
- Accounts Contact:** Full Name, Telephone, Mobile, Email
- ABN:** [Empty field]
- Accepted Credit Cards:** ☒ Visa, ☒ Mastercard, ☐ Diners, ☐ AMEX
- Direct Debit Processing:** Account Name, Account Password, API Phrase
- Test Mode (Select if Yes):** ☒

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

Importing Your School Logo

Splash supports standard image types e.g. jpg, bmp. Images may be added to the screen using either copy and paste or they can be imported into the Splash using the Import Picture command.

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



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

Displaying Your School Details on Correspondence or Reports

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

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

The screenshot shows the 'Splash' application window titled 'School Details'. The top menu bar includes 'File', 'Edit', 'View', 'Insert', 'Format', and 'Tools'. The top right corner displays 'Today's Date: 5/1/2018' and a preferences icon. The main window is divided into three sections. On the left, there is a preview area showing a 'Splash' logo and fields for 'Your Swim School Name Here', 'Wellington', 'Telephone:', 'Email:', and 'Website:'. The middle section contains form fields for 'School Name' (with a placeholder 'Your Swim School Name Here'), 'Street Address' (with sub-fields for Line 1, Line 2, Suburb, City, Country, and Post Code), 'Postal Address' (with similar sub-fields), and a 'Logo' field with a 'Click Arrow to Insert Logo' button. The right section is titled 'Document Defaults' and contains three settings: 'Display Address on Correspondence' (Yes/No), 'Display Logo on Correspondence Header' (Yes/No), and 'Display Logo on Report Header' (Yes/No). All three settings are currently set to 'Yes'.

Defining System Defaults

System Defaults are divided into seven main categories; Documents, Bookings, Students, Lists, Shifts and Custom Reports. Each of these categories allows you to customise the operation of Splash for your swim school. Here you will define default paper sizes, auto print options, and the content of value lists in specific menus.

The screenshot shows the 'System Defaults' window in the Splash application. The 'Documents' tab is selected, and a blue oval highlights the tab bar. The left sidebar contains settings for 'Swim School Default Settings', including 'Default City For All New Records', 'Default Paper Size' (A4 selected), 'Allow Catchup Bookings' (Yes selected), 'Set Automatic Rollover of Bookings' (Yes selected), 'Automatically Print Receipts' (Ask selected), 'Email Method' (Default Email Application selected), 'Enable SMS via SMS Global' (Yes selected), and 'Enable Connections via FileMaker Pro' (2). The main area shows settings for the 'Documents' tab, including 'Default Paper Size' (A4 selected), 'Confirmation and Reminders' (A4 selected), 'Receipts' (A5 selected), 'Display Address on Correspondence' (Yes selected), 'Display Logo on Correspondence Header' (Yes selected), 'Display Logo on Report Header' (Yes selected), 'Automatically Print Receipt' (Ask selected), 'Automatically Generate Confirmation' (Yes selected), 'Email Confirmation' (Yes selected), 'Email Reminder Notice' (Yes selected), 'Email Method' (Default Email Application selected), and 'Enable SMS via SMS Global' (Yes selected). A right sidebar contains the 'COMPUTERIZE LIMITED' logo and 'Helpdesk Support' contact information.

Documents

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

Bookings

Define whether catch-up or make-up lessons are permitted, what your attendance codes will be, and the default date for payment of bookings within this area of Splash.

Student

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

Lists

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

Shifts

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

Public Holidays

An optional area in Splash, you may elect to predefine future public holidays. Classes scheduled on these days will automatically be treated as non-teaching days.

Custom Reports

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

Updating Document Defaults

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

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

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

The screenshot shows the 'System Defaults' window in the 'Splash' application. The 'Documents' tab is selected. On the left, there's a sidebar with 'Swim School Default Settings' including options for default city, paper size (A4 selected), catchup bookings, rollover of bookings, print receipts (Ask), email method (Default Email Application selected), SMS via SMS Global (Yes selected), and connections via FileMaker Pro (2). The main area has tabs for Documents, Bookings, Student, Lists, Shifts, Public Holidays, and Custom Reports. Under the 'Documents' tab, settings include: Default Paper Size (A4 selected), Confirmation and Reminders (A4 selected), Receipts (A5 selected), Display Address on Correspondence (Yes selected), Display Logo on Correspondence Header (Yes selected), Display Logo on Report Header (Yes selected), Automatically Print Receipt (Ask selected), Automatically Generate Confirmation (No selected), Email Confirmation (Yes selected), Email Reminder Notice (Yes selected), Email Method (Default Email Application selected), and Enable SMS via SMS Global (Yes selected). A 'COMPUTERIZE LIMITED' logo is overlaid on the right side of the window.

7. Define your default email method. Set to **Default Email Application** if you are using Windows Mail, Outlook, or another email application installed on your computer. Select **SMTP Server** if you are accessing your mail via a browser and are not using a local email application. Additional information is required if you select SMTP Server.

This is a close-up of the 'Email Method' section. It shows two radio buttons: 'Default Email Application' and 'SMTP Server'. The 'SMTP Server' radio button is selected. Below this, there's a section titled 'SMTP Settings' which contains two input fields: 'Outgoing SMTP' and 'Port'.

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

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

Updating Booking Defaults

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

Updating the Payment Required by Field

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

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

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

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

The screenshot shows the 'Splash' application window with the 'System Defaults' tab selected. The 'Bookings' tab is active within the 'System Defaults' section. The interface includes a sidebar on the left with various settings like 'Default City', 'Paper Size', and 'Email Method'. The main area contains settings for 'Allow Makeup Bookings', 'Payment Required by Date', 'Days Before Start Date', 'Set Automatic Rollover of Bookings', 'Include Booking Comments with Rollover', 'Include Payment Information with Rollover', 'Automatically Generate Confirmation', 'Email Confirmation', 'Email Reminder Notice', 'Direct Debit Default Payment', 'Record Attendance With', and 'Record Notified Absence With'. A 'Helpdesk Support' sidebar is visible on the right.

Setting Automatic Rollover as a Student Default

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

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

This close-up shows the 'Set Automatic Rollover of Bookings' field with the 'Yes' radio button selected. Below it are the 'Include Booking Comments with Rollover' and 'Include Payment Information with Rollover' fields, both with the 'No' radio button selected.

Setting Defaults for Confirmation and Reminder Letters

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

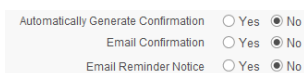
Understanding Automatic Settings

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

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

Email Reminder Notice – this script is only triggered when you manually choose to generate a reminder notice. If selected as yes a reminder notice will be sent if there is an email address on file.

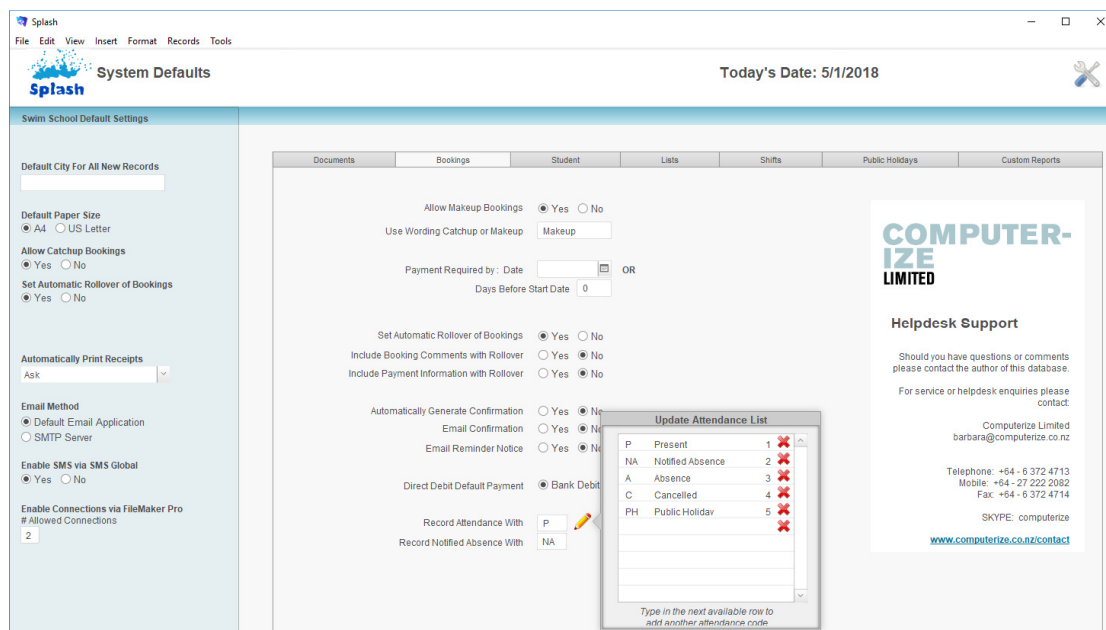
1. Click the **Preferences** tools on the top right of your screen.
2. Select **System Defaults**.
3. Ensure **Bookings** is selected within the set of tab cards across the top of your screen.
4. Define your Auto Print options for Confirmation Letters and Reminders by selecting the appropriate boxes.



Updating the Attendance Code Menu

The attendance menu is displayed in both the diary and the booking. Marking attendance gives you the ability to monitor sickness, makeups, public holidays as well as attendance. Reports can be generated which summarize the actual attendance (or non-attendance) across all bookings.

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

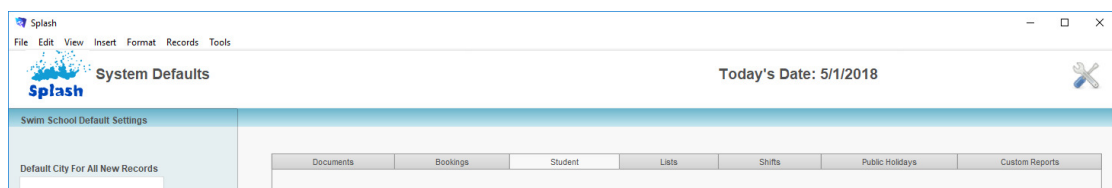


NB: Delete an existing attendance code by clicking the red cross to the right of the attendance code. When deleting a record you will always be asked to confirm the record needs to be deleted.

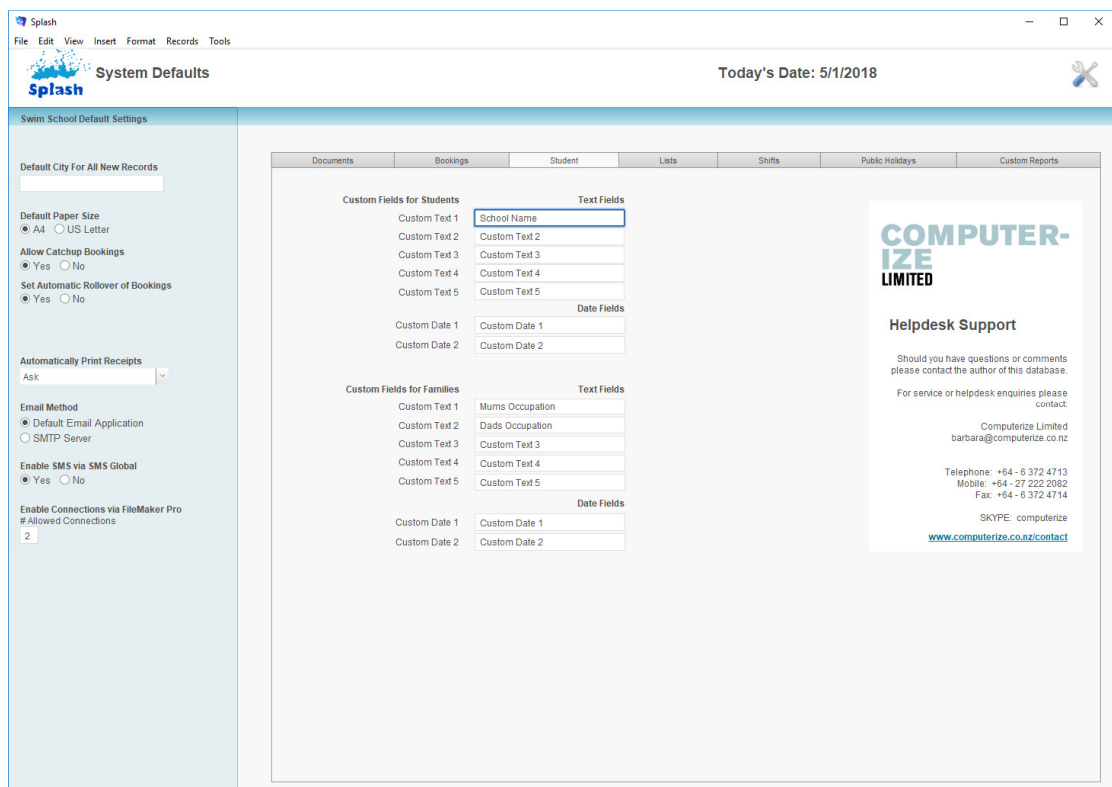
Defining Custom Student & Family Field Titles

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

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



4. Overtyping the Custom Text field contents with the label you would like to appear within the student screen.
5. Overtyping the Custom Text field contents with the label you would like to appear within the family screen.



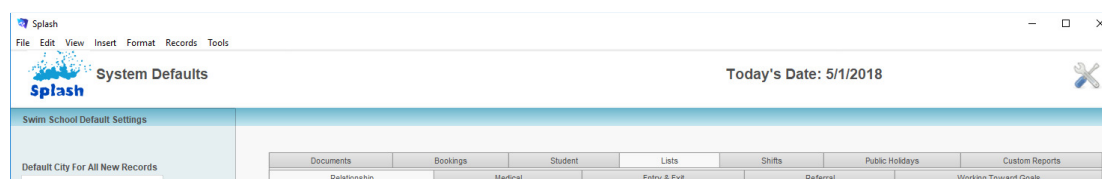
Defining List Values

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

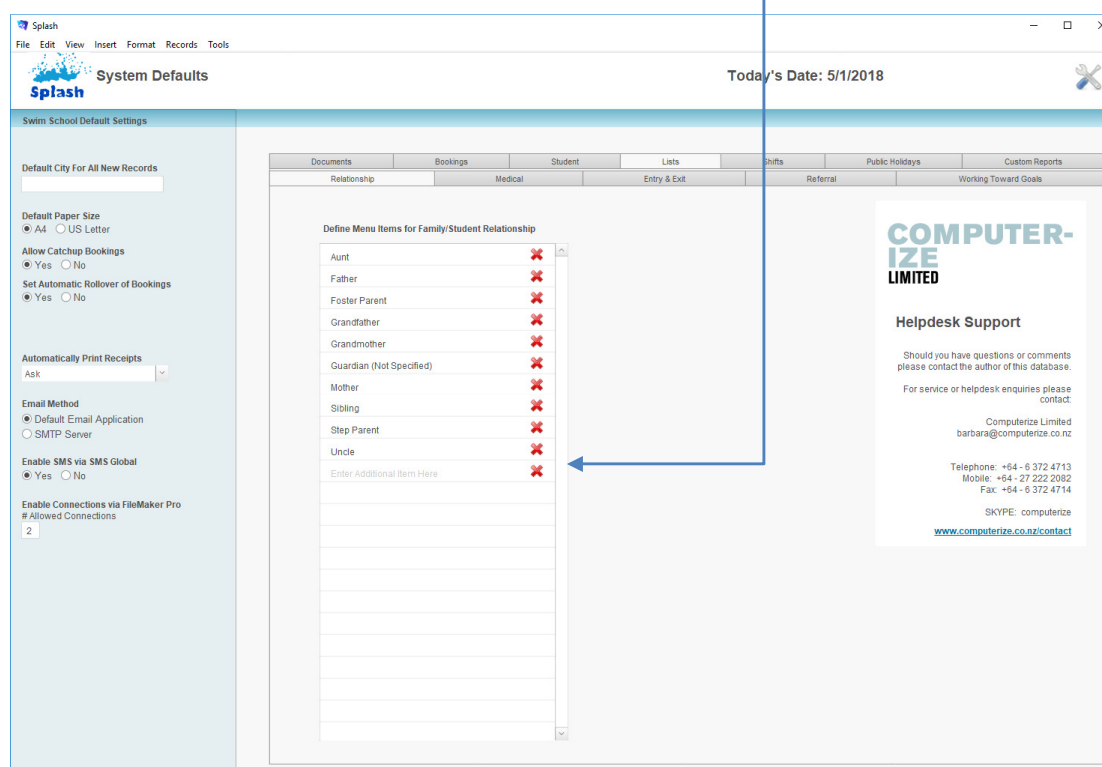
Defining Menu Items for Relationships

Items listed in this list will be displayed on the Relationship drop-down menu in the family file.

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



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

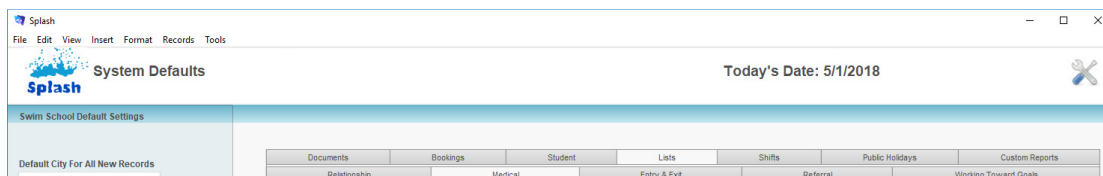


NB: Delete an existing relationship code by clicking the red cross to the right of the relevant code.

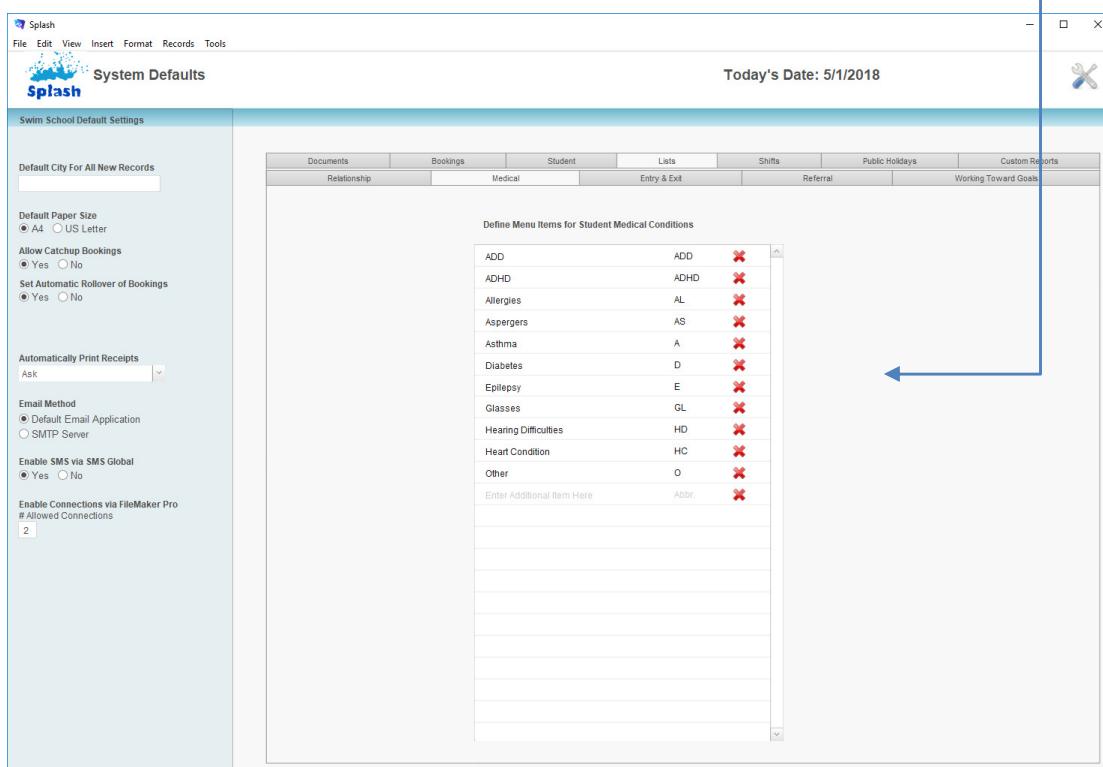
Defining Menu Items for Medical Conditions

When you first start using Splash a generic list of medical conditions will exist on the medical condition drop-down menu. This module provides the ability for you to further customise the list. Items displayed in this list will appear in the drop-down menu for medical conditions within the student record.

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



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

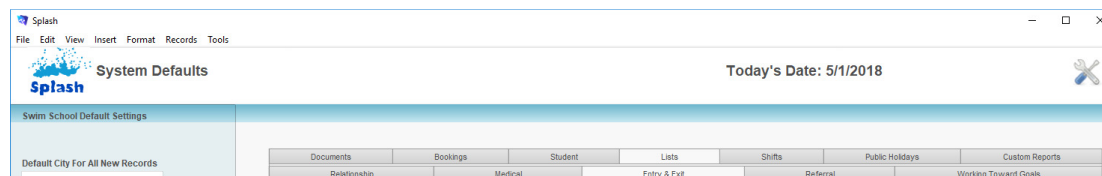


NB: Delete an existing medical code by clicking the red cross to the right of the relevant code.

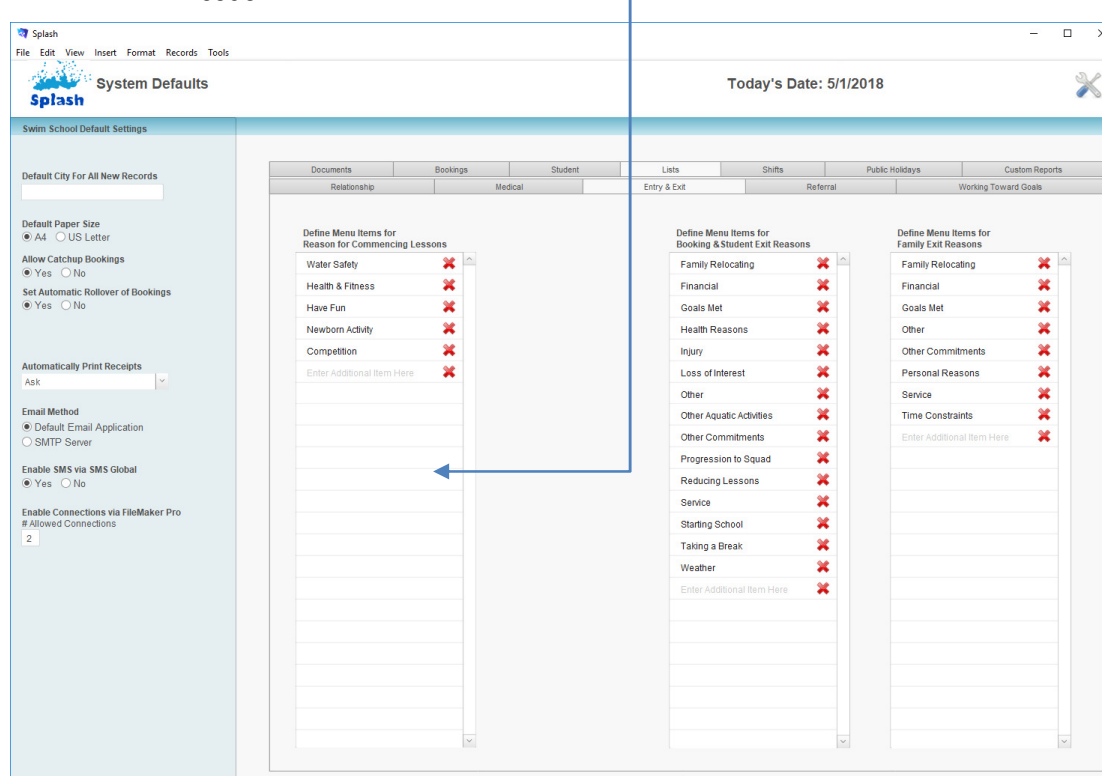
Defining Menu Items for Reason for Commencing Lessons

This tab card contains three lists; the first on the left of the screen is reason for commencing lessons, the second and third being booking/student exit reason and the family exit reason. Items displayed in the Reason for Commencing Lessons list will appear in the drop-down menu for reason for lessons within the file.

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



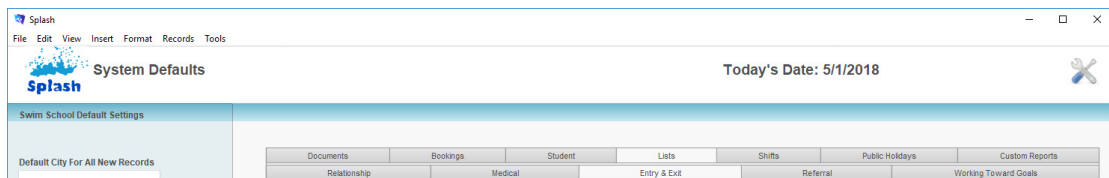
4. Select the **Entry & Exit** tab card.
5. Simply edit an existing code, or click in the next available line to add a new code.



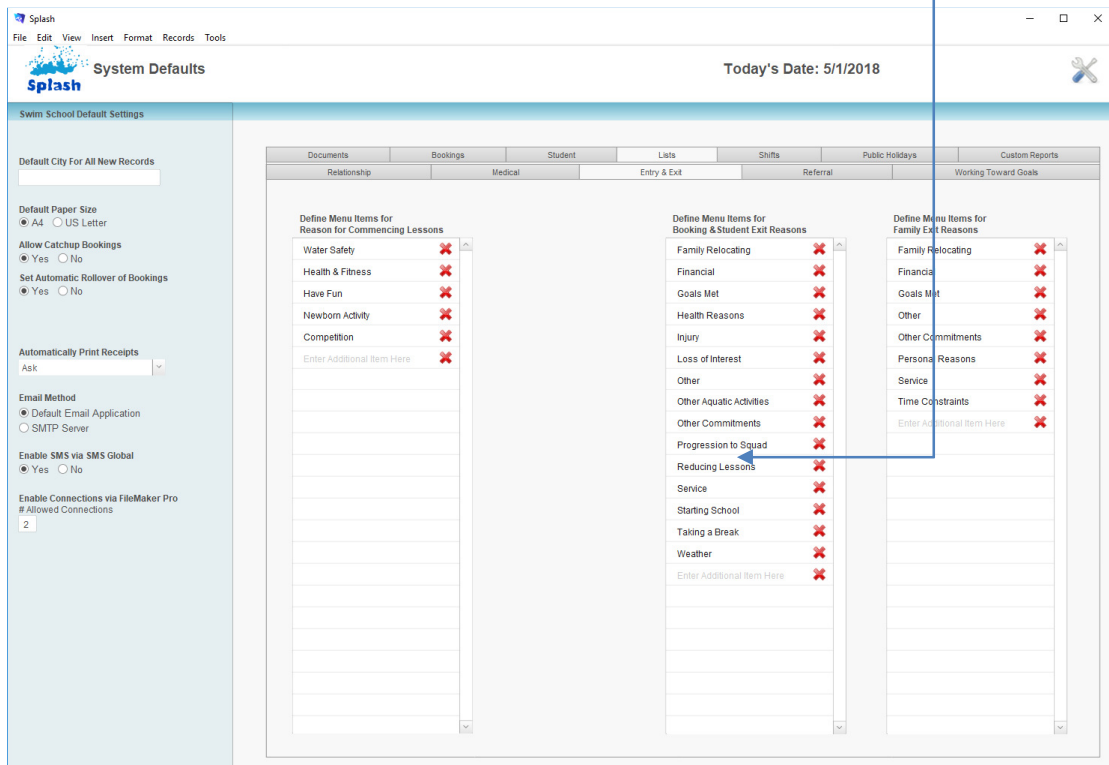
Defining Menu Items for the Exit Reason

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

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



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

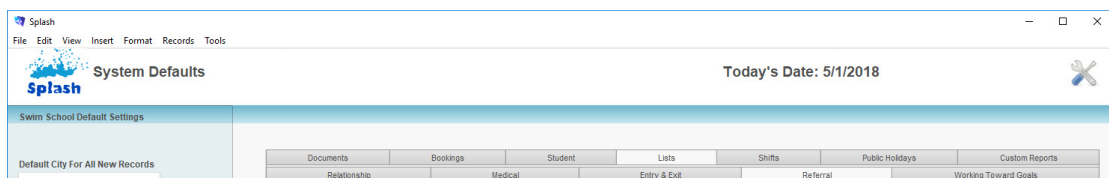


NB: Delete an existing exit code by clicking the red cross to the right of the relevant code.

Defining Menu Items for the Source of Referral

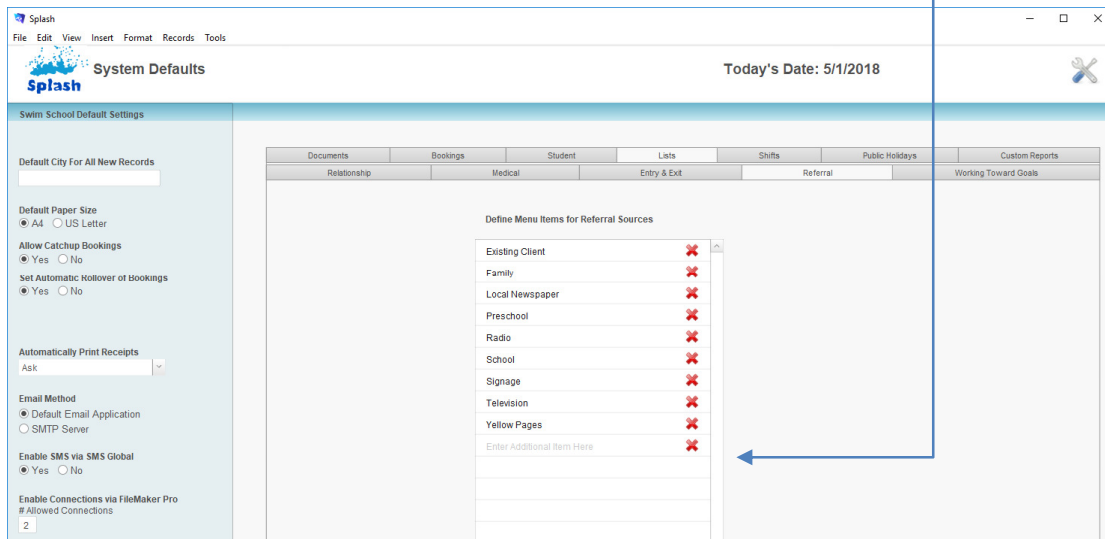
Items displayed in this list will be displayed in the drop-down menu for source of referral within the family record.

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



4. Select the **Referral** tab card.

- Simply edit an existing code, or click in the next available line to add a new code.

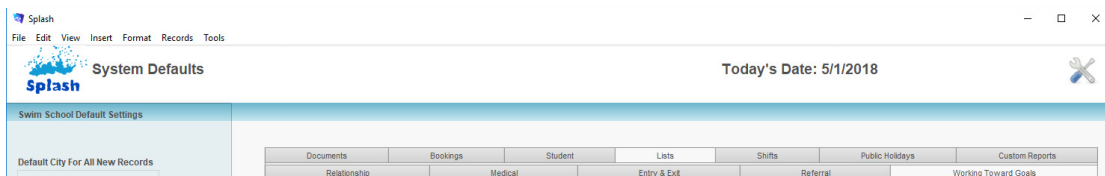


NB: Delete an existing referral code by clicking the red cross to the right of the relevant code.

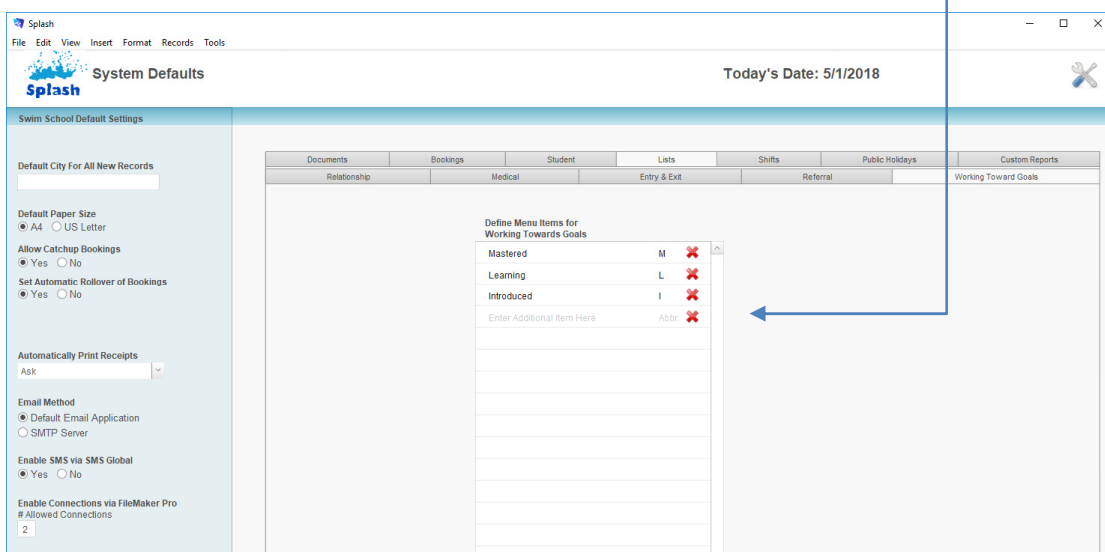
Defining Menu Items for Working Towards Goals

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

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



- Select the **Working Toward Goals** tab card.
- Simply edit an existing code, or click in the next available line to add a new code.



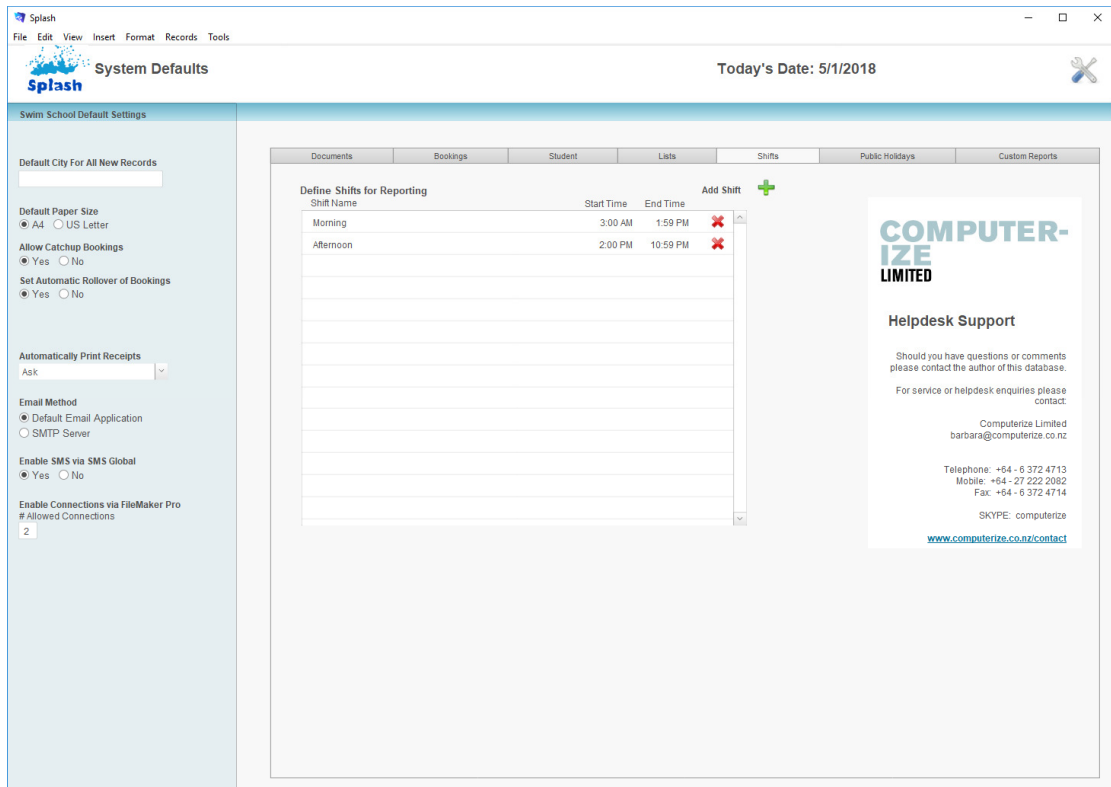
NB: Delete an existing goal status code by clicking the red cross to the right of the relevant code.

Defining Shift Times

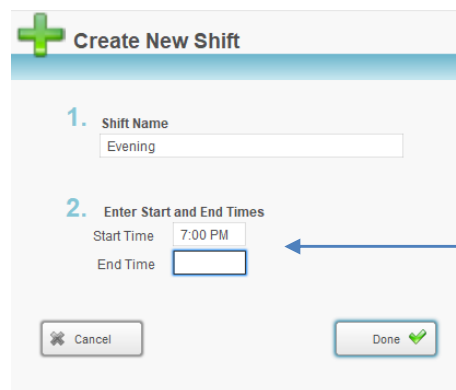
Forget searching for sessions or bookings based on the start time. Simply define shifts by start and end time and the shift name will be displayed in both the session and the bookings file. Shift information is updated at the time a session created. If you change the times or names for a shift, the change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

Creating a New Shift

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



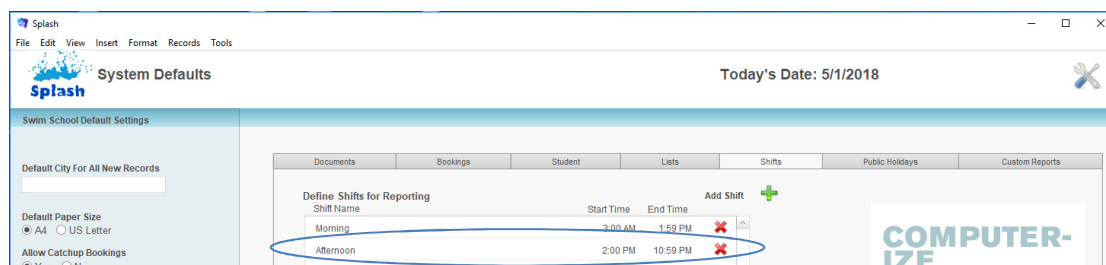
4. Click once on the **Add Shift** button to display the **Create New Shift** dialog.
5. Enter a Shift Name as well as the Start and End Time for the shift you are creating.
6. Click **Done** to save the shift details and close the dialog.



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

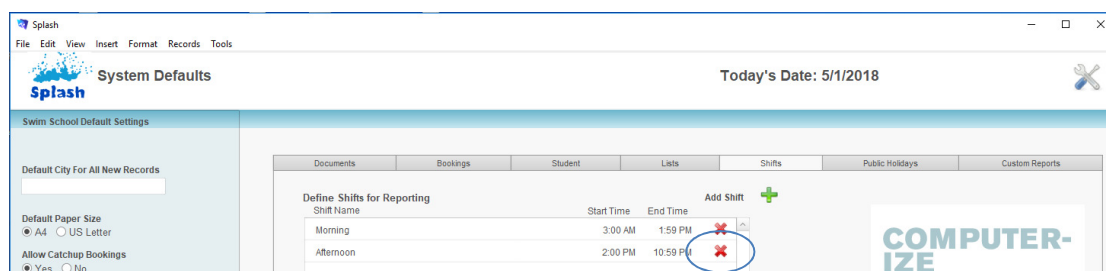
Editing an Existing Shift

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



Deleting an Existing Shift

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



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

Updating an Shift Information on Existing Sessions

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

See User Guide : *Updating a Session*

Defining Public Holidays

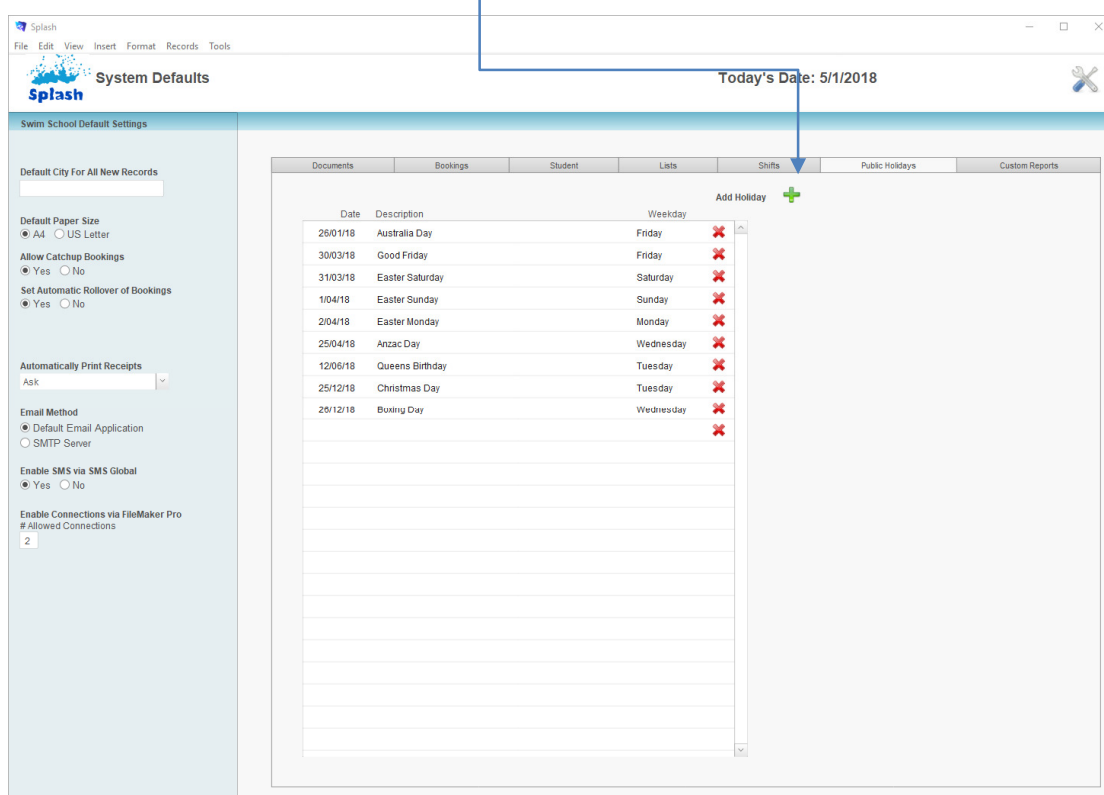
Statutory holidays differ across all locations, this area of Splash allows you to record upcoming public holidays or dates you venue may be closed. These dates are used to calculate the number lessons within the block it falls.

NB: Statutory holidays may also be defined at the time of rollover.

Recording a Public Holiday

Statutory holidays may be entered via preferences or via the sessions file at the time a rollover is completed. These instructions support recording a public holiday within the preferences file.

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



5. Enter the statutory holiday name and the date it occurs.

The dialog box is titled 'Create New Public Holiday' with a green plus icon. It contains two numbered steps: 1. 'Holiday Name' with a text input field containing 'Labuor Day'. 2. 'Enter the date of the holiday' with a date input field. At the bottom are 'Cancel' and 'Done' buttons. The 'Done' button has a green checkmark.

6. Click the **Done** button to save the information and return to the list of public holidays.

Defining a Custom Report

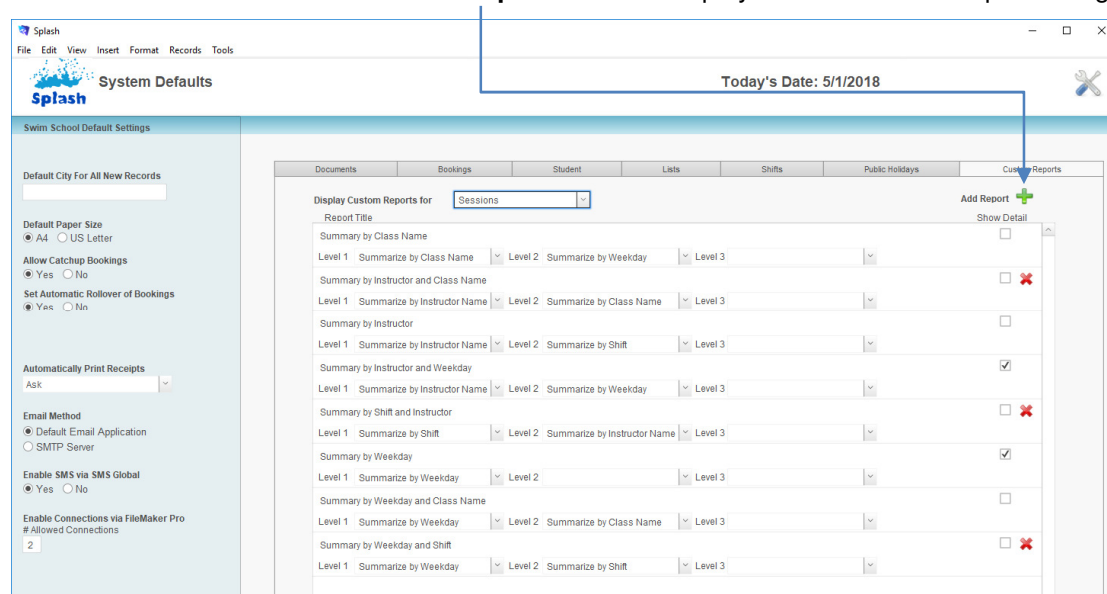
Custom reports are available within the Bookings, Families, Sessions and Student modules. In addition to the standard reports you have the ability to define an array of additional reports. When defined as a custom report; it will be displayed in the drop-down menu in the Custom Reports dialog within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

There are two types of custom reports:

- Reports – columns of data
- Graphs

Creating a Template for Custom Reporting

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



5. **Step 1** : Use the drop-down menu provided to define the module your custom report will appear in.

A screenshot of the 'Create New Report' dialog box. It has a title bar with a green plus icon and the text 'Create New Report'. The dialog is divided into sections. Section 1, 'Base Table', has a dropdown menu currently set to 'Sessions'. Section 2, 'Report Name', has a text input field containing 'Summary by Instructor and Program'. Section 3, 'Specify Summary Breakdown', has three rows for Level 1, Level 2, and Level 3. Level 1 is set to 'Summarize by Instructor Name', Level 2 is set to 'Summarize by Program' (highlighted with a blue border), and Level 3 is empty. At the bottom, there are 'Cancel' and 'Done' buttons with a green checkmark.

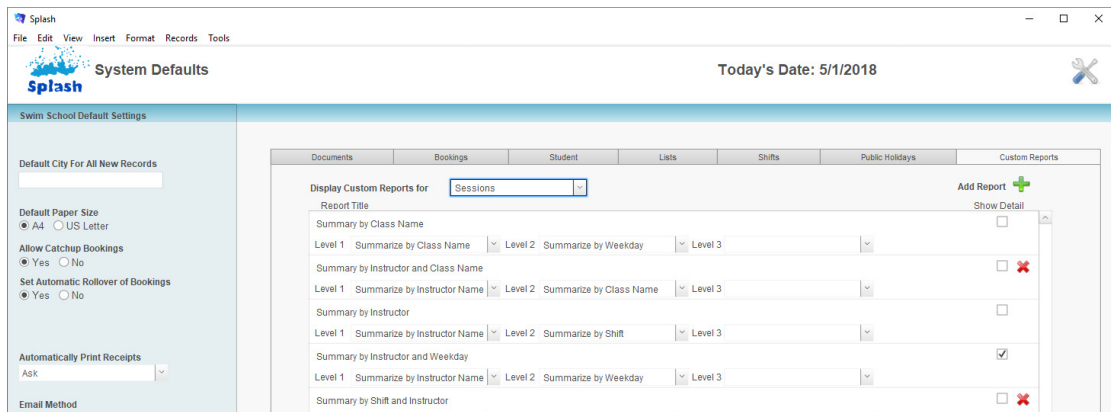
6. **Step 2** : Enter the name you will use to identify this report when it is displayed in the custom report menu.

7. **Step 3** : Select the summary groups which determine how the data will be grouped and displayed within your report.
8. Click Done to save the changes you have made and close the dialog.
9. Your new report is ready to be used; it will be displayed in the Custom Report portal on your screen.

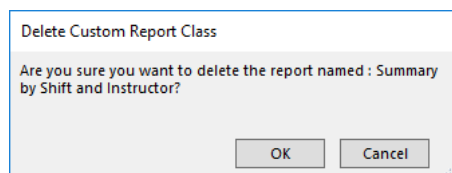
Deleting a Custom Report Template

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

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



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

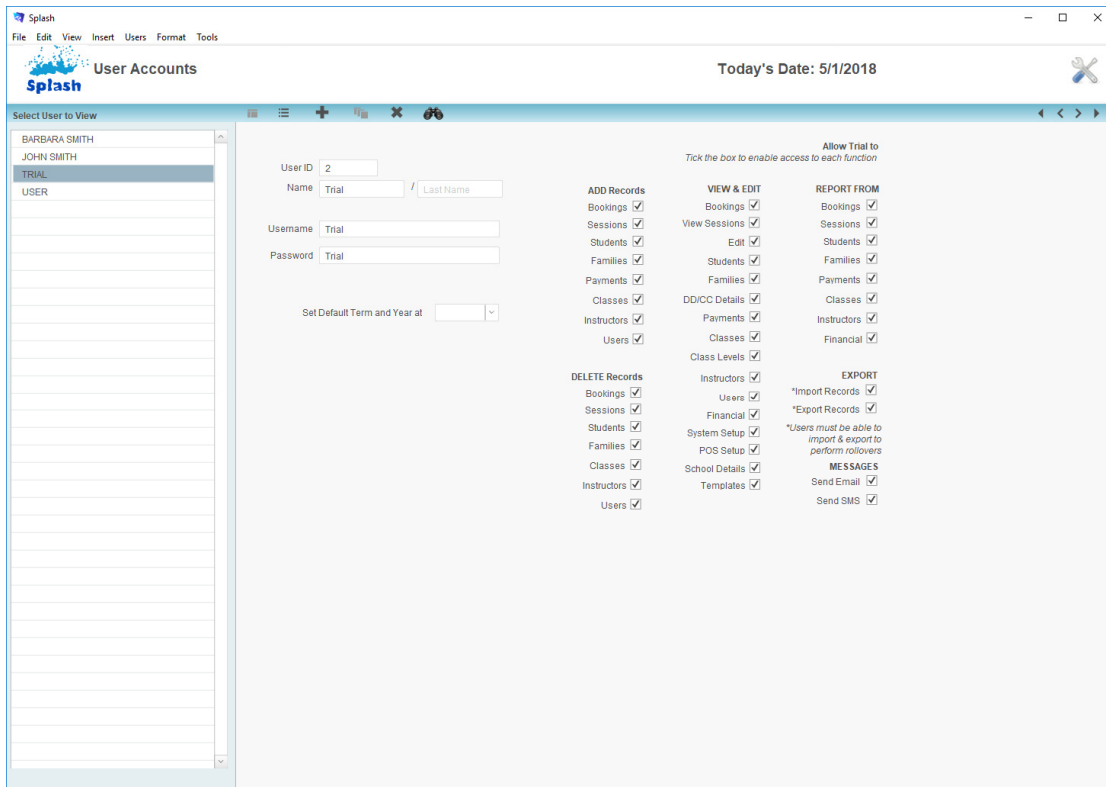


Defining User Access

A person (or role) should be defined as a user before they begin using Splash. Access privileges define the operations that are available for each login. The user module contains the access privilege settings for all Splash logins.

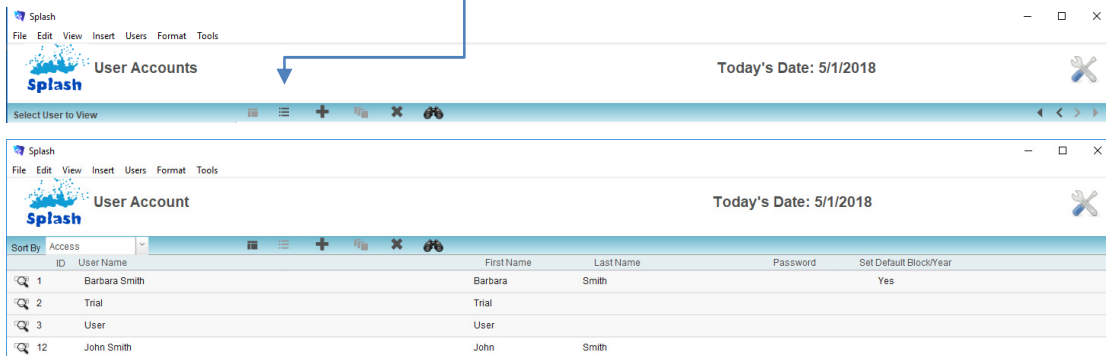
Access is divided into six categories; Add, Delete, View, Report, Export, and Messages.

When creating a user account, a tick in the box represents access to the selected function. Leave the box empty if the user should not have access.



Displaying a List of Users

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



Creating a New User

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



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

Enter New User Account

Name: John / Smith

User: John Smith

Password: Pa\$\$wörd

Set Default Term and Year at Startup: [Dropdown]

Allow John to
Cross the box to enable access to the function

ADD Records	VIEW	REPORT FROM
Bookings <input checked="" type="checkbox"/>	Bookings <input checked="" type="checkbox"/>	Bookings <input checked="" type="checkbox"/>
Sessions <input checked="" type="checkbox"/>	View Sessions <input checked="" type="checkbox"/>	Sessions <input checked="" type="checkbox"/>
Students <input checked="" type="checkbox"/>	Edit Sessions <input checked="" type="checkbox"/>	Students <input checked="" type="checkbox"/>
Families <input checked="" type="checkbox"/>	Students <input checked="" type="checkbox"/>	Families <input checked="" type="checkbox"/>
Payments <input checked="" type="checkbox"/>	Families <input checked="" type="checkbox"/>	Payments <input checked="" type="checkbox"/>
Classes <input type="checkbox"/>	DD/CC Details <input type="checkbox"/>	Classes <input type="checkbox"/>
Instructors <input type="checkbox"/>	Payments <input checked="" type="checkbox"/>	Instructors <input type="checkbox"/>
Users <input type="checkbox"/>	Classes <input type="checkbox"/>	Financial <input type="checkbox"/>
	Class Levels <input type="checkbox"/>	
	Instructors <input type="checkbox"/>	
	Users <input type="checkbox"/>	
	Financial <input type="checkbox"/>	
	System Setup <input type="checkbox"/>	
	POS Setup <input type="checkbox"/>	
	Templates <input checked="" type="checkbox"/>	
	School Details <input type="checkbox"/>	

EXPORT

*Import Records ☐

*Export Records ☐

**Users must be able to import & export to perform rollovers*

MESSAGES

Send Email ☒

Send SMS ☒

Buttons: Cancel, Done

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

Enter New User Account

Select User to View: BARBARA SMITH, JOHN SMITH, TRIAL, USER

User ID: 12

Name: John / Smith

Username: John Smith

Password: P@\$\$wörd

Set Default Term and Year at: [Dropdown]

Allow John to
Tick the box to enable access to each function

ADD Records	VIEW & EDIT	REPORT FROM
Bookings <input checked="" type="checkbox"/>	Bookings <input checked="" type="checkbox"/>	Bookings <input checked="" type="checkbox"/>
Sessions <input checked="" type="checkbox"/>	View Sessions <input checked="" type="checkbox"/>	Sessions <input checked="" type="checkbox"/>
Students <input checked="" type="checkbox"/>	Edit <input checked="" type="checkbox"/>	Students <input checked="" type="checkbox"/>
Families <input checked="" type="checkbox"/>	Students <input checked="" type="checkbox"/>	Families <input checked="" type="checkbox"/>
Payments <input checked="" type="checkbox"/>	Families <input checked="" type="checkbox"/>	Payments <input checked="" type="checkbox"/>
Classes <input type="checkbox"/>	DD/CC Details <input checked="" type="checkbox"/>	Classes <input type="checkbox"/>
Instructors <input type="checkbox"/>	Payments <input checked="" type="checkbox"/>	Instructors <input type="checkbox"/>
Users <input type="checkbox"/>	Classes <input type="checkbox"/>	Financial <input type="checkbox"/>
	Class Levels <input type="checkbox"/>	

Buttons: Cancel, Done

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

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

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

Deleting a User

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

The screenshot shows the 'Splash User Accounts' window. On the left, a list of users is displayed with 'JOHN SMITH' selected. The main area shows details for John Smith, including User ID (12), Name (John / Smith), Username (John Smith), and Password (P@\$\$w0rd). On the right, there are three columns of checkboxes for permissions: 'ADD RECORDS', 'VIEW & EDIT', and 'REPORT FROM'. The 'Allow John to' section is also visible, with a note to 'Tick the box to enable access to each function'.

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

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

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

Defining Instructor/Teacher Details

All instructors you wish to assign sessions to must be recorded in the instructor module. A session cannot be assigned to an instructor/teacher unless the instructor/teacher has been recorded and the appropriate class added to his/her list of Approved Classes.

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

The screenshot shows the 'Instructors/Teachers' window in the Splash application. The interface includes a menu bar (File, Edit, View, Insert, Format, Instructors, Scripts, Print, Tools), a toolbar, and a status bar showing 'Today's Date: 4/1/2018'. On the left, there is a filter section with 'Filter By Instructor Name:' and a list of instructors: Barbara Smith, Lisa Wilson, David Smith, Brian Roberts, and Harry Sims. The main area is divided into two tabs: 'Instructor' and 'Contact Details'. The 'Instructor' tab is active, showing fields for Instructor ID, Name (Barbara / Smith), Date of Birth, Age, Gender (Female), and Medical. The 'Contact Details' tab is also visible, showing fields for Address, Suburb, City, PC, Email (barbara@computerize.co.nz), Home, Mobile (027 2222082), and In Case of Emergency (Name, Telephone). To the right of the form, there is a section titled 'Approved for Classes' which lists classes that Barbara has been authorized to take: Assessment, DOL (Dolphins), JEL (Jellyfish), PEN (Penguin), SEA (Seals), SHR (Shrimps), STA (Starfish), and TUR (Turtles). Each class has a red 'X' icon next to it. Below this list, there is an 'Employment' section with 'Start Date' (26/9/17) and 'End Date' fields.

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

Each instructor record contains two tab cards:

- Approved for Classes
- Qualifications

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

Splash

File
Edit
View
Insert
Format
Instructors
Scripts
Print
Tools

Instructors/Teachers

Today's Date: 4/1/2018

Filter By Instructor Name:

Everyone

☐ Active

Sort By: Full Name

To Be Advised

Barbara Smith

Lisa Wilson

David Smith

Brian Roberts

Harry Sims

Instructor

Instructor ID: BS

Status: Active

Name: Barbara / Smith

Date of Birth:

Age:

Gender: Female

Medical:

Contact Details

Address

Suburb

City

PC

Contact Details

Email

barbara@computerize.co.nz

Home

027 2222082

Mobile

In Case of Emergency

Name

Telephone

Comments

Approved for Classes

Qualifications

Barbara has been authorised to take the following classes:

Q

ASS

Assessment

Q

DOL

Dolphins

Q

JEL

Jellyfish

Q

PEN

Penguin

Q

SEA

Seals

Q

SHR

Shrimps

Q

STA

Starfish

Q

TUR

Turtles

Employment

Start Date

26/9/17

End Date

Qualifications –this tabcard is used to record specific instructor/teacher qualifications and their respective expiration date. First aid qualifications or teaching accreditations can be recorded in this area of Splash.

[illegible]

Displaying the Instructor/Teacher Form View

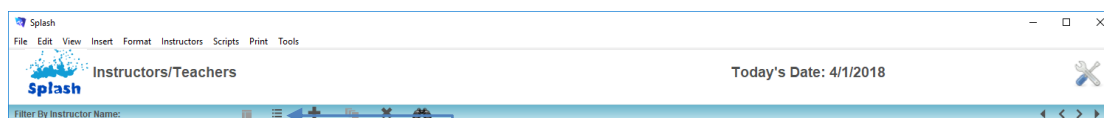
The instructor/teacher home screen displays as a list of all instructors registered to teach in your school.

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

Listing Instructor/Teacher Records

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

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



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

Splash

File

Edit

View

Insert

Format

Records

Scripts

Tools

Window

Help

Splash

Instructors/Teachers

Today's Date: 4/1/2018

Sort By

Full Name

ID

Last Name

First Name

Address

Email

Telephone

Status

Q

TBA

Advised

To Be

email@test.co.nz

027 2222082

Active

Q

BS

Smith

Barbara

barbara@computerize.co.nz

Active

Q

LW

Wilson

Lisa

Active

Q

DS

Smith

David

mail@computerize.co.nz

027 27314897

Active

Q

BR

Roberts

Brian

Active

Q

HS

Sims

Harry

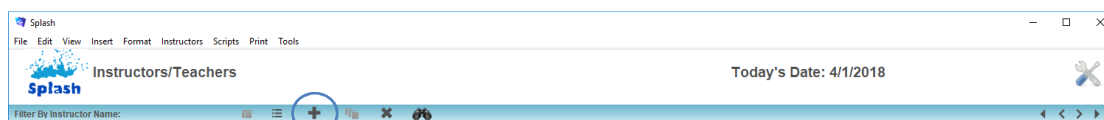
Active

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

Creating a New Instructor/Teacher

An instructor cannot be assigned to a session unless they have been registered in the Instructor module, therefore new record should be created whenever the school employs a new instructor/teacher.

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



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

Enter New Instructor

Instructor ID: JS

Name: John Smith

Address: Street Address 1

Suburb: Suburb

City: City Postcode:

Contact Details

Email:

Telephone: ☐ ☒

Mobile: ☐ ☒

Emergency Contact

Name:

Telephone:

Comments:

Start Date: 4/1/2018

Cancel Done

5. Complete as many details as possible on the Personal screen. **An instructor record must contain an Instructor ID. The Instructor ID must be a unique identifier**; we recommend using instructor/teacher initials as the ID.
6. Click the **Done** button when all relevant details have been entered.
7. The Instructor/teacher details screen will be displayed.
8. The final stage in creating an instructor is defining the classes he/she is qualified to teach.

Splash

File Edit View Insert Format Instructors Scripts Print Tools

Instructors/Teachers

Today's Date: 4/1/2018

Filter By Instructor Name: Everyone ☐ Active

Sort By: Full Name

To Be Advised

Barbara Smith

Lisa Wilson

David Smith

Brian Roberts

Harry Sims

John Smith

Instructor

Instructor ID: JS Status: Active

Name: John / Smith

Date of Birth: Age:

Gender: Medical:

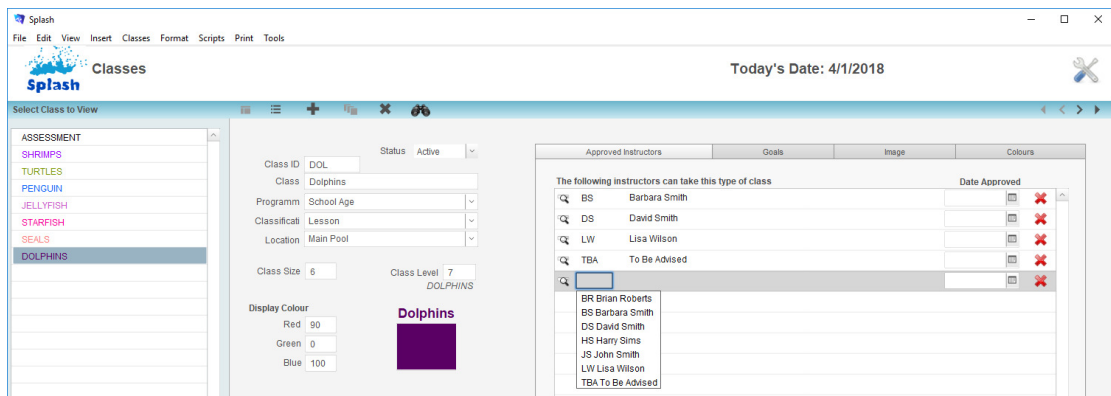
Approved for Classes

John has been authorised to take the following classes:

Defining Approved Classes for an Instructor/Teacher

Use the classes file in Splash to define which classes an instructor/teacher is qualified to teach.

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



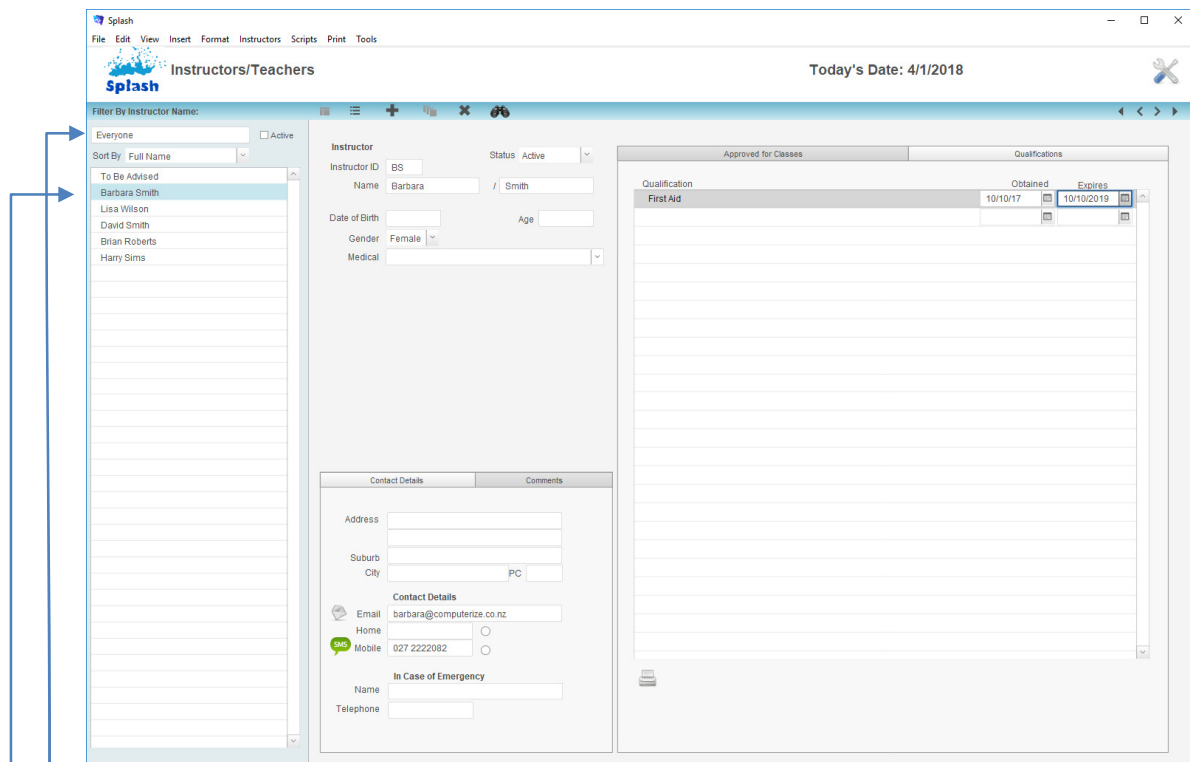
5. Use the portal on the right of the screen to define the instructors approved to take the class.
6. Enter each instructor on the next available line in the portal.
7. The information will be saved as soon as you select another class or exit this screen.

NB: The red cross is used to remove any instructor from the list.

Finding an Instructor/Teacher

Using the Find Portal

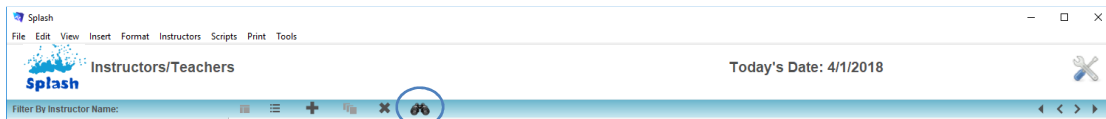
1. Click the **Preferences** tools on the top right of your screen.
2. Select **Instructors**.
3. The Instructor/teacher details screen will be displayed.



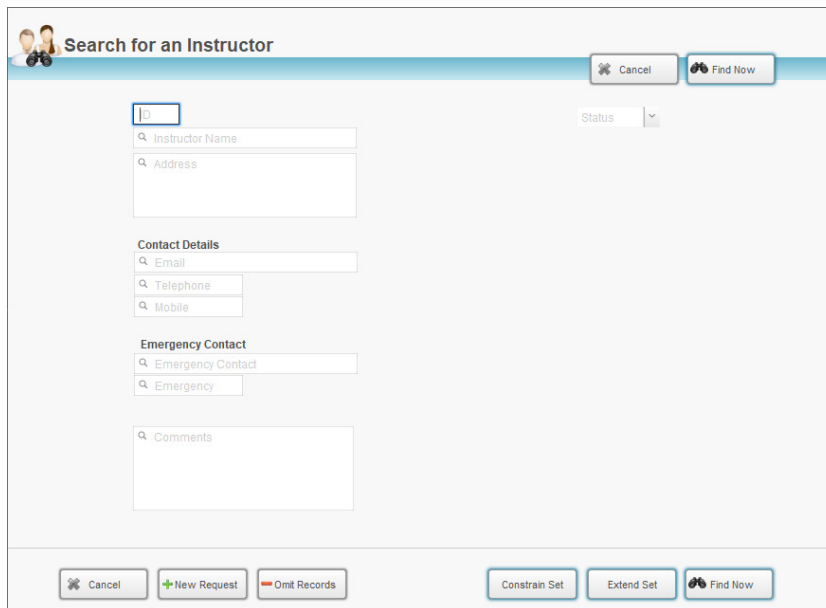
4. Enter the instructor first name or last name in the portal filter displayed on the left of the screen.
5. Using the portal on the left of the screen, click once on Instructor you wish to display.

Using the Find Command

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



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



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

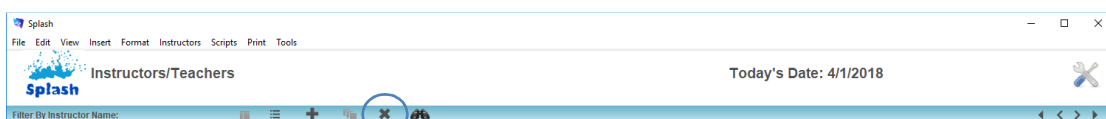
Updating Instructor/Teacher Details

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

Deleting an Instructor/Teacher Record

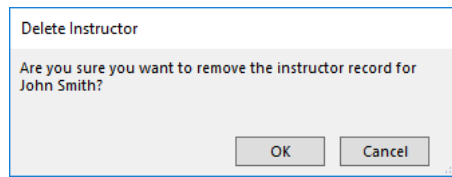
Records in Splash only need to be deleted if they were created in error. Retaining historic information can be beneficial for reporting at a later date. If you need to delete an instructor record you can do so from either the Instructor form view or the list view.

Deleting an Instructor from List View



1. Use the **Finding an Instructor** function to locate the instructor/teacher record you wish to delete.
2. When the correct instructor screen is displayed click once on the row containing the instructor you wish to delete.

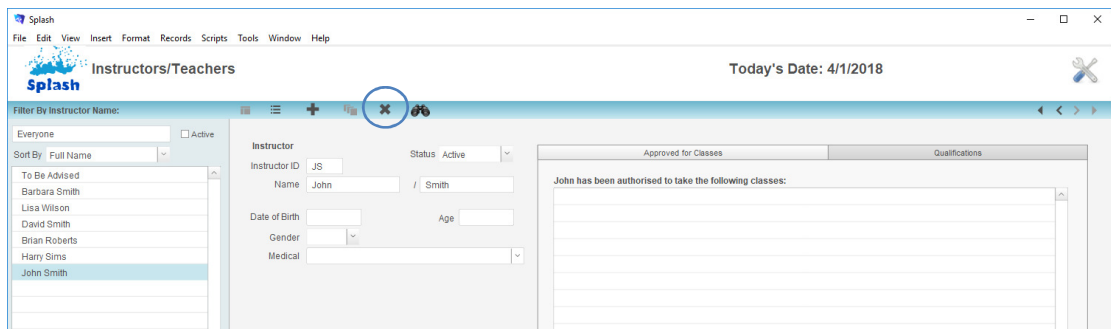
3. Click once on the **Delete Instructor** button.
4. You will be asked to confirm you wish to delete the selected Instructor.



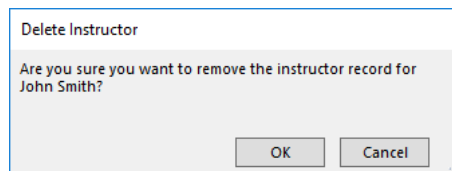
5. Click **OK** to delete the selected instructor or **Cancel** to return to the instructor screen without making a change.

Deleting an Instructor from the Instructor/Teacher Form View

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



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

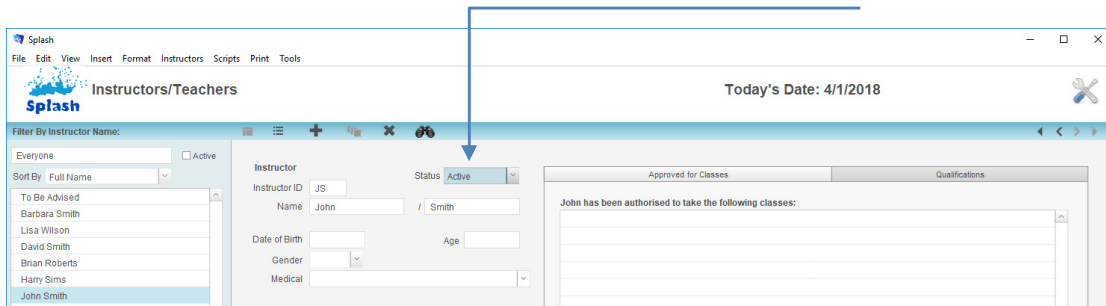


6. You will be asked to confirm the instructor that is to be deleted.
7. Click the **OK** button to delete the selected instructor or Cancel to return to the Instructor/teacher screen without making a change.

Changing an Instructor/Teacher to Inactive

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

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



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

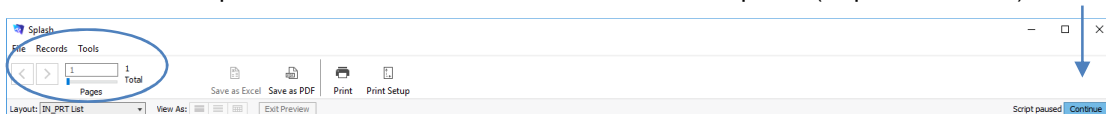
Printing Instructor/Teacher Reports

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

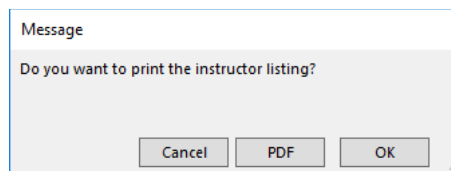
Printing a List of Instructors

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

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



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



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

List of Instructors/Teachers		
Instructor Name & Address	Telephone	Mobile
TBA To Be Advised		027 2222084
BS Barbara Smith 123 Any St, Suburb, Wellington 4001		027 2222082
LW Lisa Wilson 54 Wightson Rd, Tawa, Wellington 4051	04 237 8545	
DS David Smith		027 27314897

Defining Class Details

The Class Record

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

Approved Instructors – Use this area of the screen to maintain a record of which instructors are qualified to take the selected class. Simply select the Instructor ID from the drop-down menu provided in the next available row.

Class Goals – Displayed in the second tab card on the right of the screen; here you can view a list of goals that students are aiming to achieve while they are in this class. The goals displayed here relate to the class level you have selected on the left of the screen.

The screenshot shows the 'Splash' application window with the 'Classes' tab selected. The 'Select Class to View' sidebar on the left lists various animal classes, with 'DOLPHINS' highlighted. The main content area displays the details for the 'DOLPHINS' class. The 'Class ID' is 'DOL' and the 'Status' is 'Active'. The 'Class' is 'Dolphins', 'Program' is 'School Age', 'Classification' is 'Lesson', and 'Location' is 'Main Pool'. The 'Class Size' is '6' and the 'Class Level' is '7'. The 'Display Colour' is set to 'Dolphins' with RGB values of Red: 90, Green: 0, and Blue: 100. The 'Cost of Session' is set to 'Cost Per Session' with a 'Default Cost' of '\$20.00' and a 'DD Cost' of '\$20.50'. There is a 'Comments' text area. On the right, the 'Approved Instructors' tab is active, showing a table of instructors: BS (Barbara Smith), DS (David Smith), LW (Lisa Wilson), and TBA (To Be Advised). Each row has a 'Date Approved' column with a red 'X' icon.

Class Colours – Displayed in the third tab card on the right of the screen; the colours portal links to a colour wheel. It allows to you easily locate the RGB settings for any colour of your choice. When defined on a class record, the colour is used to represent the class in the diary or session listings.

This screenshot shows the same 'Splash' application window, but with the 'Colours' tab selected on the right. The 'ColorPicker' tool is displayed, showing a color wheel and a color selection area. The selected color is '#5A0064'. The RGB values are displayed as H: 294, S: 100, B: 39, R: 90, G: 0, and B: 100. The 'Add to My Co' button is visible. The 'Generate Color Scheme' section at the bottom offers options like 'COMPLEMENTARY', 'TRISOMIC', 'TETRADIC', 'ANALOGIC', and 'MONO'. The 'Spread the Word - Quick Tips - CSS Examples - Feedback' link is also present.

Displaying the Class Form View

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

The screenshot shows the 'Classes' form view in the Splash application. The left sidebar lists various class types: ASSESSMENT, SHRIMPS, TURTLES, PENGUIN, JELLYFISH, STARFISH, SEALS, and DOLPHINS (selected). The main form area displays details for the 'DOLPHINS' class, including Class ID (DOL), Class (Dolphins), Programme (School Age), Classification (Lesson), Location (Main Pool), Class Size (6), Class Level (7), Display Colour (Dolphins), Cost Method (Cost Per Session), Default Cost (\$20.00), and DD Cost (\$20.50). A 'Comments' text area is at the bottom. On the right, a table lists approved instructors: BS (Barbara Smith), DS (David Smith), LW (Lisa Wilson), and TBA (To Be Advised), each with a 'Date Approved' column and a red 'X' icon.

Listing Class 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.

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

This screenshot shows the same 'Classes' form view as before, but with the 'List View' button highlighted in the blue stripe at the top of the screen.

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

Sort By	ID	Class Name	Level	Programme	Classification	Size	Colour	Cost Method	\$	DD \$
	Q DOL	Dolphins	7	School Age	Lesson	6		Cost Per Session	\$20.00	\$20.50
	Q JEL	Jellyfish	4	School Age	Lesson	6		Cost Per Session	\$20.00	\$20.50
	Q PEN	Penguin	3	Preschool	Lesson	6		Cost Per Session	\$20.00	\$20.50
	Q SEA	Seals	6	School Age	Lesson	4		Cost Per Session	\$20.00	\$20.50
	Q SHR	Shrimps	1	Parent & Child	Lesson	8		Cost Per Session	\$15.00	\$15.00
	Q STA	Starfish	5	School Age	Lesson	4		Cost Per Session	\$20.00	\$20.50
	Q TUR	Turtles	2	Parent & Child	Lesson	8		Cost Per Session	\$15.00	\$15.00
	Q ASS	Assessment	0	Assessment	Lesson	99		Cost Per Session	\$0.00	\$0.00

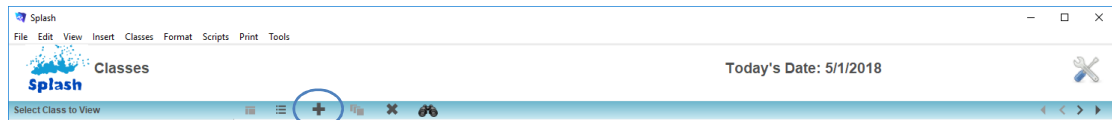
NB: Click the magnifier beside the Class ID to display the corresponding data entry screen.

Creating a New Class

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

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

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



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

The screenshot shows the 'Enter New Class' form. It has a title bar with a green plus icon and the text 'Enter New Class'. The form contains several input fields: 'Class ID' (with 'SH' entered), 'Class Name' (with 'SHARKS' entered), 'Programme' (a dropdown menu), 'Classification' (a dropdown menu), 'Location' (a dropdown menu), 'Class Size' (a text box), and 'Class Level' (a text box). There's a 'Display Colour' section with 'Red', 'Green', and 'Blue' options, each with a '0' in a text box. To the right of these is a black square. Below that is a 'Cost of Session' section with 'Cost Method' (a dropdown menu), 'Default Cost' (a text box), and 'DD Cost' (a text box). At the bottom is a 'Comments' text box. There are two buttons at the bottom: 'Cancel' and 'Done' (with a green checkmark).

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

The screenshot shows the 'Enter New Class' form with the 'Class Level' dropdown menu open. The dropdown menu lists the following options: 1 SHRIMPS, 2 TURTLES, 3 PENGUIN, 4 JELLYFISH, 5 STARFISH, 6 SEALS, 7 DOLPHINS, and 8 SHARKS. The 'SHARKS' option is highlighted. The form also shows the 'Class Size' text box, the 'Display Colour' section with 'Red', 'Green', and 'Blue' options, each with a '0' in a text box, and a black square.

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

Understanding Class Costs

Class costs can be defined in one of two ways;

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

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

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

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

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

Understanding How Costs Affect Rollover

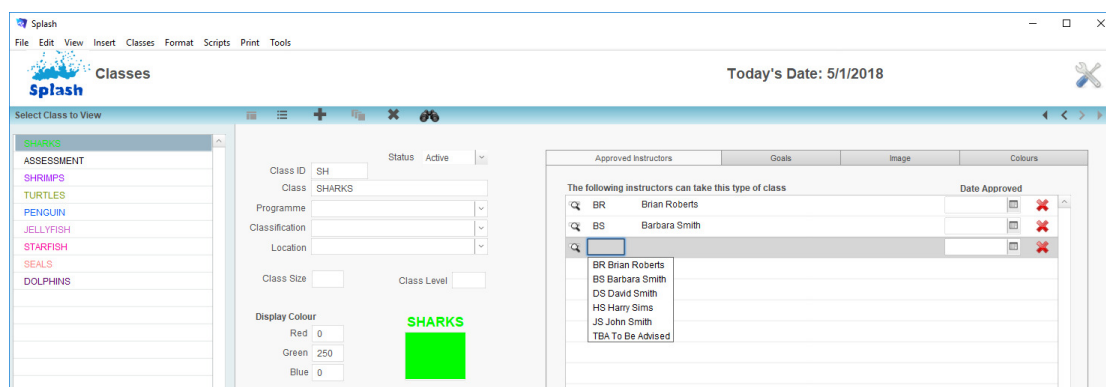
All costs are copied to a session at the time the session record is created. When you perform the rollover the cost for the new term is defined by the value displayed in the class file at the time the rollover is performed.

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

Defining Approved Instructors

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

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



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

Defining Goals for the Class

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

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

The screenshot shows the 'Splash Classes' application window. On the left, a 'Select Class to View' portal lists various classes, with 'DOLPHINS' highlighted. The main area displays details for the 'DOLPHINS' class, including Class ID (DOL), Class (Dolphins), Programme (School Age), Classification (Lesson), Location (Main Pool), Class Size (6), Class Level (7), Display Colour (Dolphins), and Cost of Session (Default Cost: \$20.00, DO Cost: \$20.50). On the right, the 'Goals' tab is active, showing a list of goals for Class Level 7: 1 100m Freestyle, 2 100m Backstroke, 3 50m Breaststroke, and 4 Butterfly Arms.

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

This close-up shows the 'Class Level' dropdown menu. The 'Class Size' is set to 6. The 'Display Colour' is set to 'Dolphins'. The dropdown menu is open, showing a list of class levels from 1 to 8, with '7 DOLPHINS' selected.

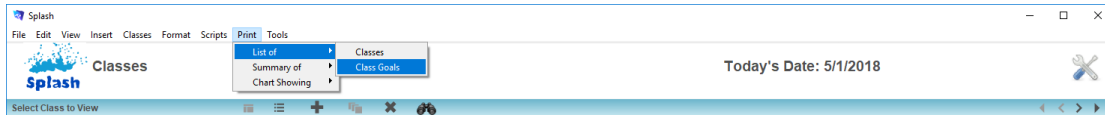
7. Goals for this class will automatically appear when the class level is selected.
8. The information will be saved as soon as you select another class or exit this screen.

Printing a List of Class Goals

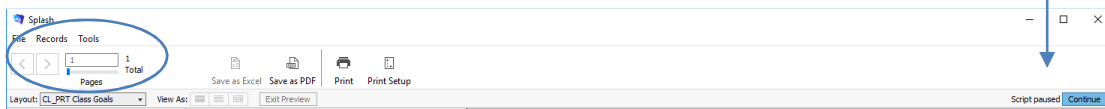
This report displays a list of the goals linked to the selected class. Access to this report is restricted to those who have access to report class information.

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

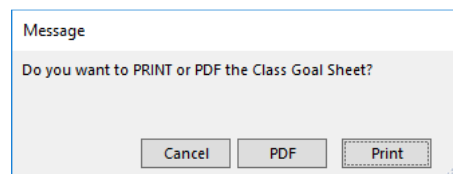
5. Select **List of ...** from the Print menu and select **Class Goals** from the pop-out menu displayed.



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



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



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

Class Information for Dolphins (DOL)		
Program : School Age		
Classification : Lesson		
Level : DOLPHINS		
Size : 6		
1	100m Freestyle	100 Fr
2	100m Backstroke	100 Bk
3	50m Breaststroke	50 br
4	Butterfly Arms	BF Arms

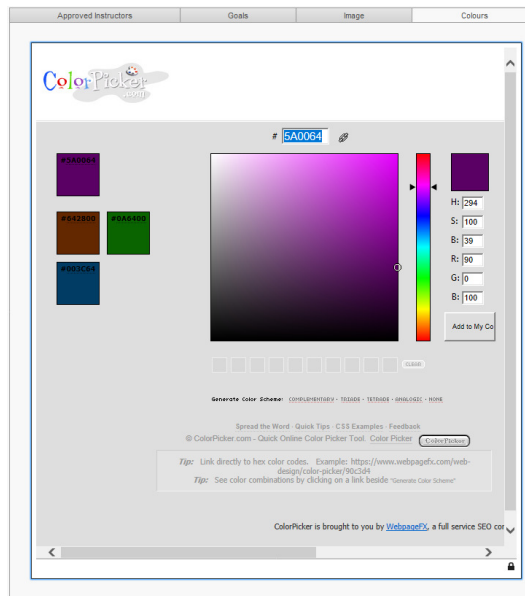
Defining the Colour of a Class

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

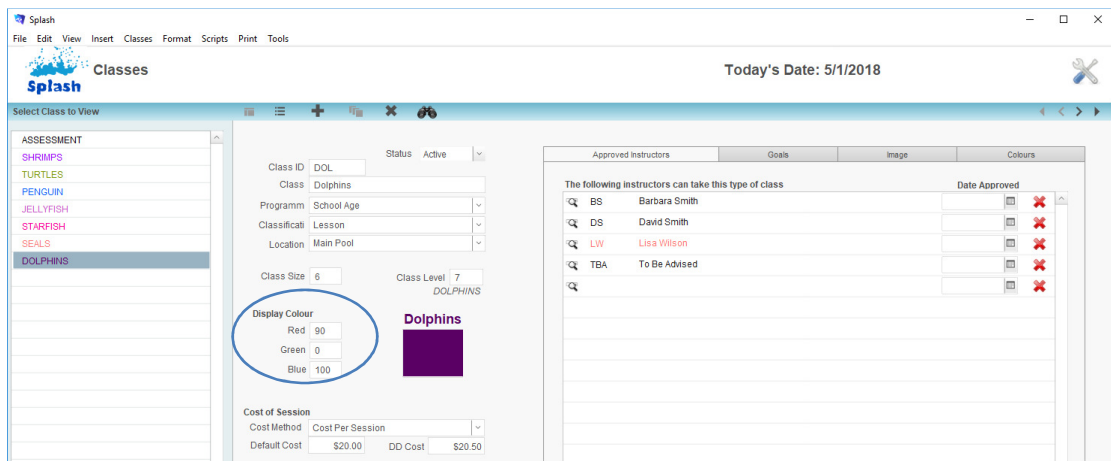
Colours are determined using the RGB colour palette. This means you need to enter 3 numbers one red value, one green value, and one blue value in order to display a colour. RGB values are any number between 0 and 255.

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

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



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

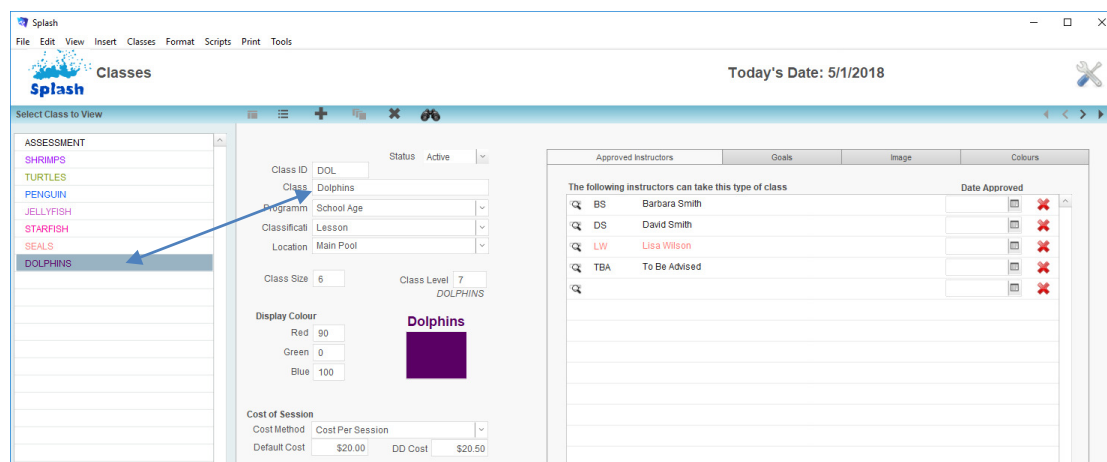


5. Simply enter the R G B numbers in the fields provided on your screen.
6. The colour sample will change to reflect the numbers you have entered.
7. The information will be saved as soon as you select another class or exit this screen.

Finding a Class

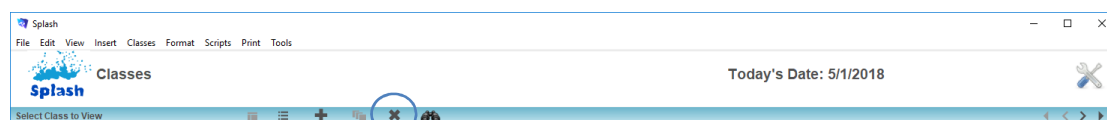
Using the Find Portal

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



Using the Find Command

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



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

The 'Search for a Class' dialog box is shown. It contains the following fields and buttons:

- Class ID
- Class Name
- Program
- Classification
- Location
- Size
- Cost of Session
 - Cost Method
 - Cost
 - DD Cost
- Comments
- Buttons: Cancel, Find Now, New Request, Omit Records, Constrain Set, Extend Set, Find Now

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

Updating Class Details

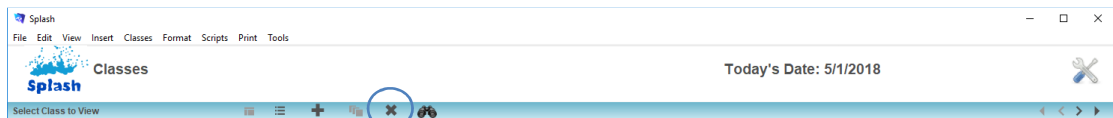
1. Use the **Finding a Class** button to locate the class record you wish to update.
2. If one record is located the record will be displayed on the Class form view.
3. Update any details as required.

Deleting a Class Record

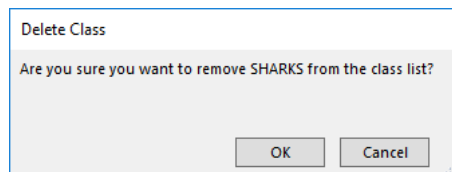
Class records can be deleted from either the Class form view or the list view.

Deleting a Class from List View

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

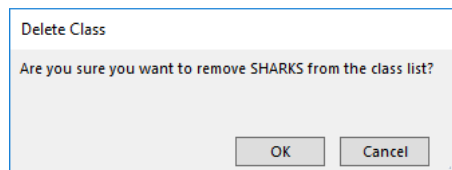


4. You will be asked to confirm you wish to delete the selected class.



Deleting a Class from the Class Entry Screen

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



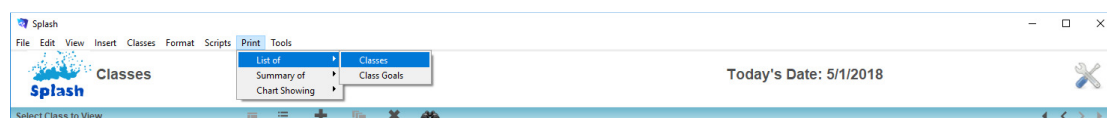
Printing Class Reports

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

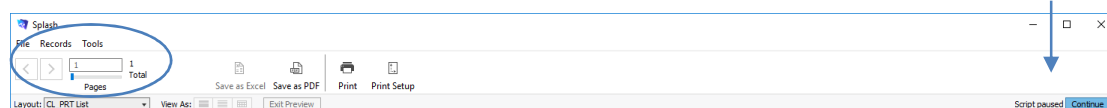
Printing a List of Classes

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

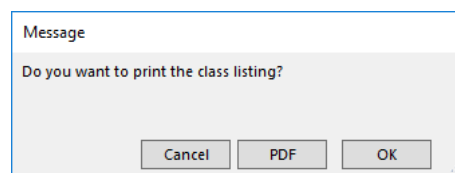
1. Use the **Finding a Class** function to locate the class record you wish to delete.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Classes** from the pop-out menu displayed.



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



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



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

List of Classes

Class ID		Max Size	Cost	DD Cost	Level	Status
DOL	Dolphins	6	\$20.00	\$20.50	7 DOLPHINS	Active
JEL	Jellyfish	6	\$20.00	\$20.50	4 JELLYFISH	Active
PEN	Penguin	6	\$20.00	\$20.50	3 PENGUIN	Active
SEA	Seals	4	\$20.00	\$20.50	6 SEALS	Active
SHR	Shrimps	8	\$15.00	\$15.00	1 SHRIMPS	Active
STA	Starfish	4	\$20.00	\$20.50	5 STARFISH	Active
TUR	Turtles	8	\$15.00	\$15.00	2 TURTLES	Active
ASS	Assessment	99	\$0.00	\$0.00	0	Active
SH	SHARKS				8 SHARKS	Active

Defining Session Details

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

The Session Record

Each session record contains the following two sections:

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

The screenshot shows the 'Splash Sessions' application interface. The top menu bar includes File, Edit, View, Insert, Sessions, Format, Scripts, Print, and Tools. The main window is titled 'Sessions' and displays 'Today's Date: 5/1/2018'. On the left, there is a 'Filter By:' section with dropdowns for 'All' and 'All', and a list of days (Monday through Sunday) with checkboxes. Below this is a list of sessions with columns for time, class name, and instructor. The main area is divided into two sections: 'Sessions Details' and 'Bookings'. The 'Sessions Details' section includes fields for Class ID (TUR), Session ID (3449), Class Name (Turtles), Class Level (2), Maximum Size (8), Programme (Parent & Child), and Classification (Lesson). It also shows 'Cost of Session' with 'Cost Per Session' set to \$15.00, 'Default Cost' at \$60.00, and 'DD Cost' at \$15.00. The 'Bookings' section displays a table with columns for 'All Bookings', 'Makeup', 'Waiting List', 'Goals', 'Comments', and 'Lesson Dates'. The table shows two bookings: Joanne Jones (2_9m) and Peter Williamson (3_11m), both with 'BR' status. At the bottom, there are summary statistics: Maximum Size 8, Current Bookings 2, Active Makeup 0, and Current Spaces 6.

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

Green = Lesson in Current Week

Orange = Future Lesson

Red = Past Lesson

This screenshot shows the same 'Splash Sessions' application interface as the previous one, but with the 'Bookings' section displaying color-coded bookings. The 'Sessions Details' section remains the same. The 'Bookings' table now shows two bookings: Peter Williamson (3_11m) with a green status and Jason Smith (6_4m) with an orange status. The 'Lesson Dates' column shows dates 15/01/18 and 02/01/18 respectively. The summary statistics at the bottom are: Maximum Size 8, Current Bookings 2, Active Makeup 0, and Current Spaces 6.

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

The screenshot shows the 'Waiting List' tab selected. The interface includes a sidebar with a filter by date and time, a main area with session details and a table of waitlisted students, and a right-hand panel with session details and instructor information.

Filter By:

- All
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Sessions Details:

- Class ID: TUR
- Session ID: 3449
- Class Name: Turtles
- Class Level: 2
- Maximum Size: 8
- Programme: Parent & Child
- Classification: Lesson
- Cost of Session: \$15.00
- Cost Per Session: \$15.00
- Default Cost: \$60.00
- DD Cost: \$15.00
- Default Total: \$60.00
- DD Total: \$60.00

Instructor Details:

- Instructor: BR Brian Roberts
- Telephone: [Empty]

Waiting List Table:

All Bookings	Makeup	Waiting List	Goals	Comments	Lesson Dates
5/01/18	JOSEPH Zimmerman	0272222082	Andy		
5/01/18	Robert Harper	0272222082	Edith Harper		

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

The screenshot shows the 'Comments' tab selected. The interface includes a sidebar with a filter by date and time, a main area with session details and a text input field for comments, and a right-hand panel with session details and instructor information.

Filter By:

- All
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Sessions Details:

- Class ID: TUR
- Session ID: 3449
- Class Name: Turtles
- Class Level: 2
- Maximum Size: 8
- Programme: Parent & Child
- Classification: Lesson
- Cost of Session: \$15.00
- Cost Per Session: \$15.00
- Default Cost: \$60.00
- DD Cost: \$15.00
- Default Total: \$60.00
- DD Total: \$60.00

Instructor Details:

- Instructor: BR Brian Roberts
- Telephone: [Empty]

Comments Table:

All Bookings	Makeup	Waiting List	Goals	Comments	Lesson Dates
Add a comment about the lesson here...					

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

The screenshot shows the 'Goals' tab selected. The interface includes a sidebar with a filter by date and time, a main area with session details and a list of goals, and a right-hand panel with session details and instructor information.

Filter By:

- All
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Sessions Details:

- Class ID: TUR
- Session ID: 3449
- Class Name: Turtles
- Class Level: 2
- Maximum Size: 8
- Programme: Parent & Child
- Classification: Lesson
- Cost of Session: \$15.00
- Cost Per Session: \$15.00
- Default Cost: \$60.00
- DD Cost: \$15.00
- Default Total: \$60.00
- DD Total: \$60.00

Instructor Details:

- Instructor: BR Brian Roberts
- Telephone: [Empty]

Goals Table:

All Bookings	Makeup	Waiting List	Goals	Comments	Lesson Dates
1	Happy in the water		HIW		
2	Blowing bubbles and eyes under		BB Eyes		
3	Front star float		FFloat		
4	Torpedo		Torp		

Lesson Dates – located in the fifth tab card on the screen. Lesson dates allow you to define default attendance codes which will automatically transferred to a booking when a new booking is made e.g. a public holiday.

The screenshot shows the 'Lesson Dates' tab in the Splash Sessions application. The interface includes a sidebar with filters for days of the week and months. The main content area has a text box for adding comments and a 'Sessions Details' section with fields for Class ID, Session ID, Class Name, Class Level, Programme, Classification, Cost of Session, Cost Method, Default Cost, DD Cost, and Default Total. There are also buttons for 'Add Booking', 'Add Makeup', 'Add Waitlist', and 'Print WL'. A table at the bottom shows 'All Bookings' with columns for Date, Spaces, and a dropdown menu.

Listing Session Records

Each session record can be displayed in either form view or list view. List view displays all records in the found set – see the bottom left corner of the screen for the size of the current found set.

Splash

File Edit View Insert Sessions Format Scripts Print Tools

Sessions

Today's Date: 5/1/2018

Sort By Instructor

ID	Class ID & Name	Weekday	Start Date	Time	Instructor	Size	Booked Spaces	Block	Year	Location
3444	SEA Seals	Thursday	11/1/18	3:45PM	TBA To Be Advised	4	4	0	Jan 2018	Main Pool
3445	SEA Seals	Monday	8/1/18	4:30PM	TBA To Be Advised	4	0	4	Jan 2018	Main Pool
3446	SEA Seals	Monday	8/1/18	5:15PM	TBA To Be Advised	4	1	3	Jan 2018	Main Pool
3447	TUR Turtles	Monday	8/1/18	3:30PM	BR Brian Roberts	8	1	7	Jan 2018	Learners Pool
3448	TUR Turtles	Monday	8/1/18	4:00PM	BR Brian Roberts	8	1	7	Jan 2018	Learners Pool
3449	TUR Turtles	Monday	8/1/18	4:30PM	BR Brian Roberts	8	2	4	Jan 2018	Learners Pool
3450	TUR Turtles	Monday	8/1/18	5:00PM	BR Brian Roberts	8	0	8	Jan 2018	Learners Pool
3468	PEN Penguin	Wednesday	10/1/18	5:00PM	LW Lisa Wilson	6	0	6	Jan 2018	Main Pool
3469	PEN Penguin	Wednesday	10/1/18	5:30PM	LW Lisa Wilson	6	0	6	Jan 2018	Main Pool

Displaying found set (68 out of 1156)

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

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

Splash

File Edit View Insert Sessions Format Scripts Print Tools

Sessions

Today's Date: 5/1/2018

Sort By

Instructor

ID

Class ID & Name

Weekday

Start Date

Time

Instructor

Size

Booked Spaces

Block

Year

Location

3444

SEA Seals

Thursday

11/1/18

3:45PM

TBA To Be Advised

4

4

0

Jan

2018

Main Pool

3445

SEA Seals

Monday

8/1/18

4:30PM

TBA To Be Advised

4

Craig King (9.5m)

Hamish McDougall (8.10m)

Jack McArthur (8.5m)

Paul Fairbrother (8.7m)

18

Main Pool

3446

SEA Seals

Monday

8/1/18

5:15PM

TBA To Be Advised

4

1

3

Jan

2018

Main Pool

3447

TUR Turtles

Monday

8/1/18

3:30PM

BR Brian Roberts

8

1

7

Jan

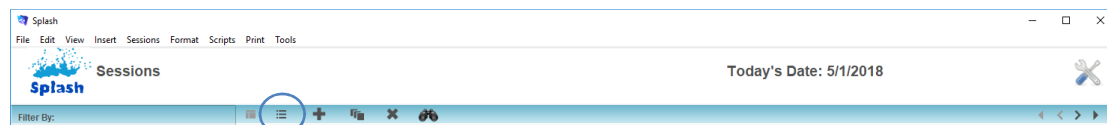
2018

Learners Pool

Displaying found set (68 out of 1156)

Displaying a List of Sessions

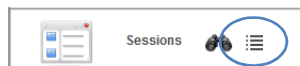
1. Click once on the **List View** button displayed in the blue stripe at the top of your screen.



2. The Session List View screen will be displayed.

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

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

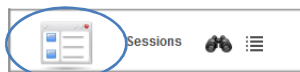


3. The Session List View screen will be displayed

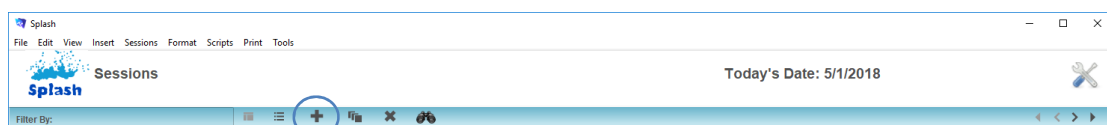
Creating a New Session

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

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



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



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

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

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

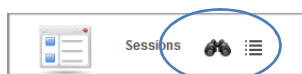
Defining Comments for Display in the Daily Diary

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

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

Finding a Session

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



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

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

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

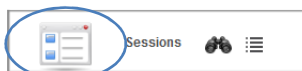
Updating Session Details

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

Adding a Student Booking

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

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

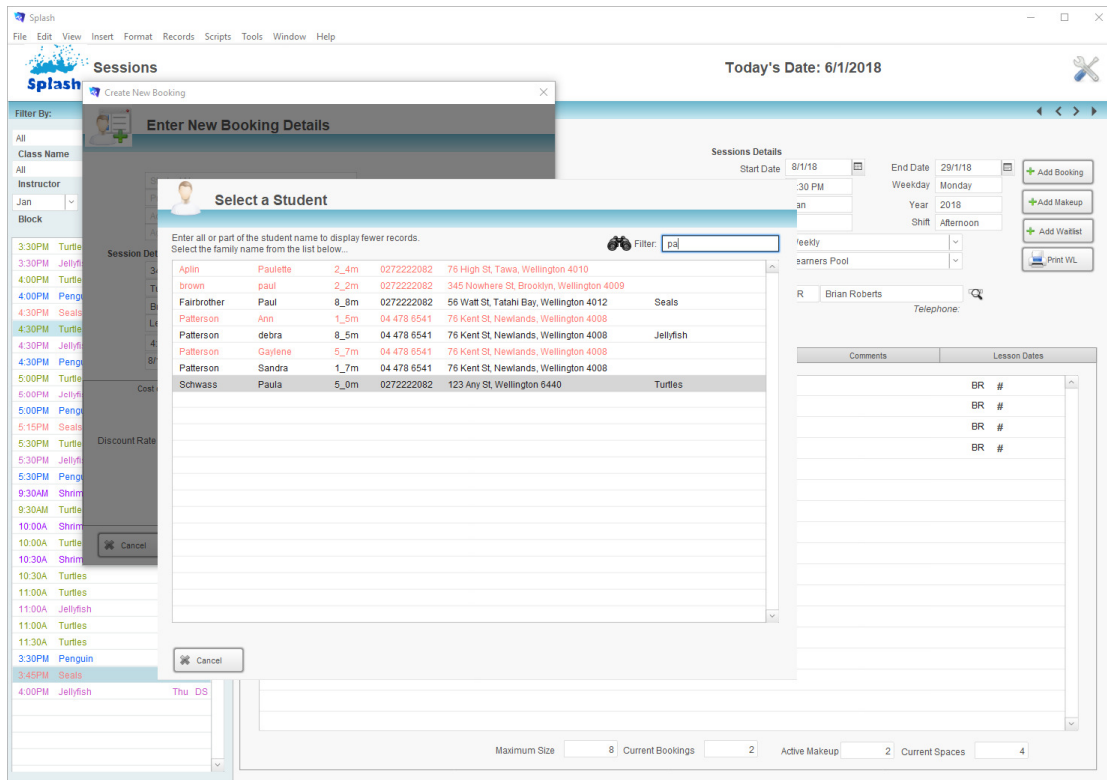


3. The Session data entry screen will be displayed, enter the criteria for the session you wish to review in the filter fields at the top of the portal list on the left of your screen. →
4. Select the portal row that contains the class you wish to book your student in to.
5. The portal row will be highlighted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

Class ID	Class Name	Start Date	End Date
TUR	Turtles	8/1/18	29/1/18

Student Name	Current Bookings	Active Makeup	Current Spaces
Joanne Jones	2_9m		
Peter Williamson	3_11m		
Jason Smith	6_4m		
Peter Williamson	3_11m		

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



8. Your cursor will be placed in the filter field; begin typing the students first name or last name. As you type list of all students matching the characters entered will be displayed on your screen.
9. To select a student for your booking, simply click once on the line displaying the correct student name.
10. The Enter New Booking dialog will be displayed.

Create New Booking

Enter New Booking Details

Paula Schwass

0272222082

123 Any St, Wellington 6440

5_0m

Female

Bookings This Block 2

Session Details

3449

TUR

Jan

2018

Turtles

Brian Roberts

Learners Pool

4:30 PM

No. of Lessons 4

8/1/18

Monday

29/1/18

Cost of Lessons	Direct Debit	Comments
<div>Cost Per Session</div> <div>Discount Rate 10</div> <div>Discount Type Percent</div> <div>Payment Due By 8/1/2018</div> <div>Payment by Direct Debit Yes</div> <div>Update Direct Debit Details</div>	<div>@ \$15.00</div> <div>Discount Applied \$6.00</div> <div>Credit Applied</div> <div>Value of Free Lessons \$0.00</div> <div>Balance Due \$54.00</div>	<div>Initial Cost \$60.00</div>

Cancel

Done

- 11.If the student is not starting on the first day of block, update the start date and the number of session.
- 12.Add a discount rate or credit value if required and click the **Done** button.
- 13.The information will be saved and you will be returned to the Session details screen.
- 14.The students name will appear in the list of bookings on the right of your screen. Your system defaults will determine whether a confirmation letter is sent automatically.

Deleting a Session Record

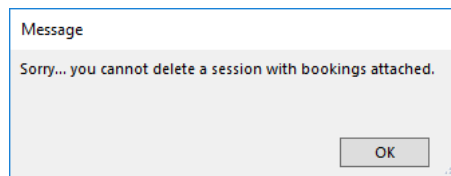
Session records can be deleted from either the Session form or the list view. A session that contains either bookings or waitlisted students cannot be deleted.

Deleting a Session from List View

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

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

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



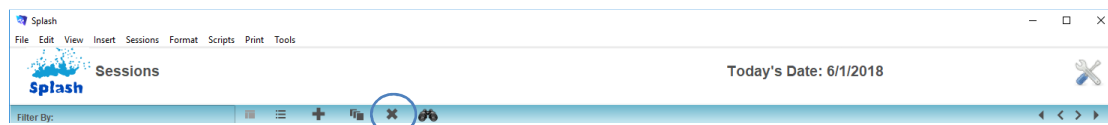
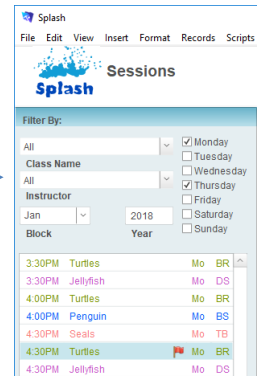
NB: You cannot delete a session with bookings or waitlisted students attached.

Deleting a Session from the Session Form View

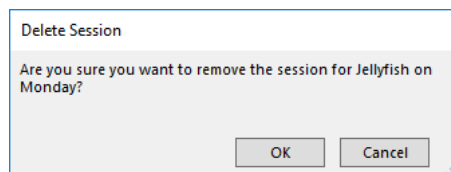
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Session** icon



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



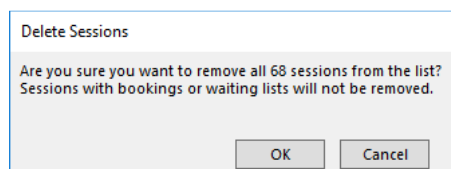
7. You will be asked to confirm the selected session is to be deleted.



Deleting a Group of Sessions

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

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



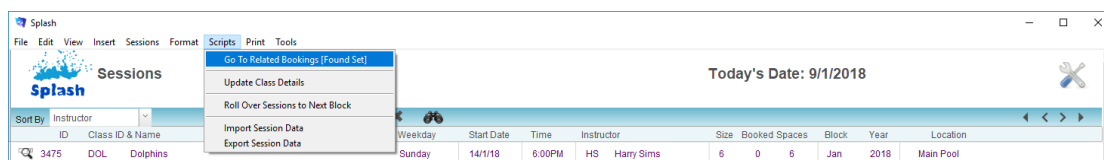
NB: Sessions with bookings attached will not be deleted, however all remaining sessions in the found set will be removed.

Go to Related Bookings [Found Set]

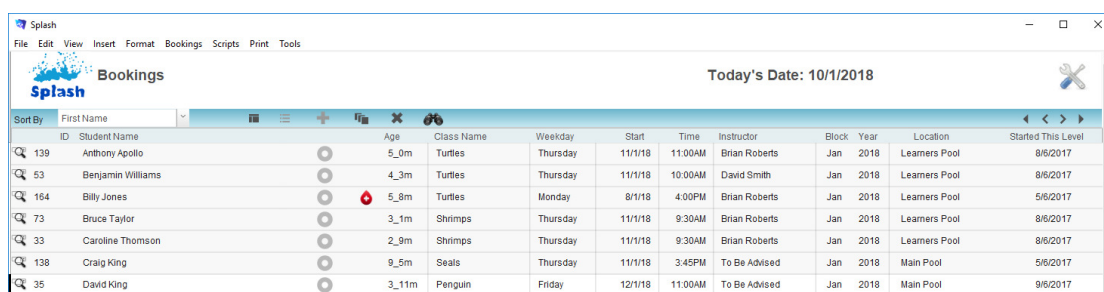
There will be times when you need to locate all the students in the found set of sessions. This command locates all the bookings for the found sessions and displays them in a list within the bookings module.

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

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



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



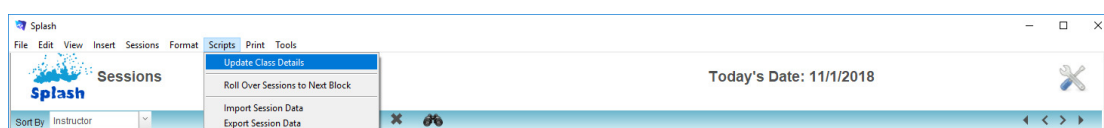
Update Class Details

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

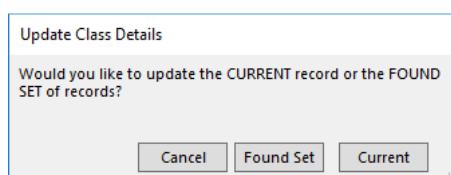
Class details can be updated for a single session or for all sessions in the found set.

Updating Class Details

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



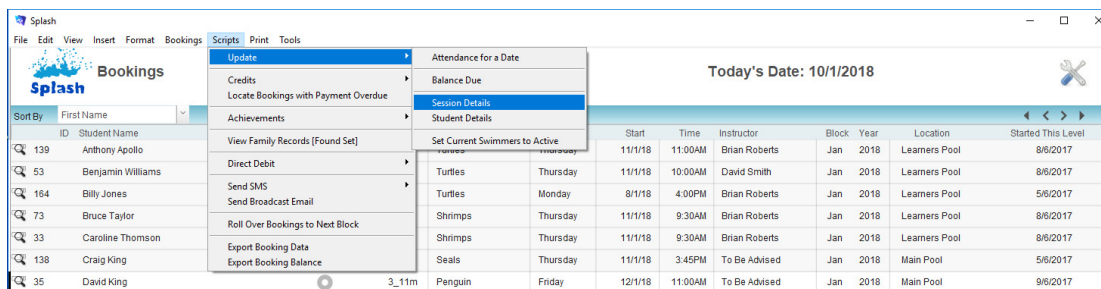
3. The Update Class Details dialog will be displayed on your screen. Click once on either the **Found Set** button or the **Current Record** button.



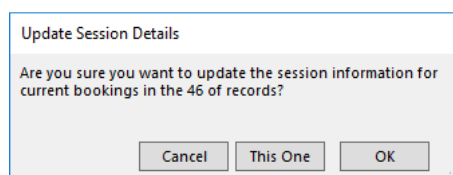
NB: If there are bookings attached to the selected sessions also perform the following:

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

- When the correct bookings are displayed on your screen choose **Update...Session Details** from the **Scripts** menu.



- The Update Session Details dialog will be displayed on your screen. Click once on the OK button.
- Click the OK button to update all the found records.



Rolling Over Sessions

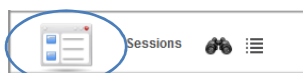
This command enables you to copy your existing timetable to the next term. **If you are unsure about this process please make a backup of your Splash Data file before you begin.**

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

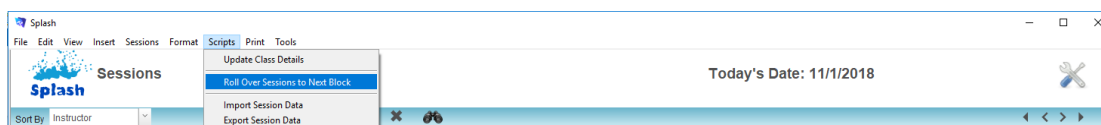
Rollover Sessions to Make a New Block

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

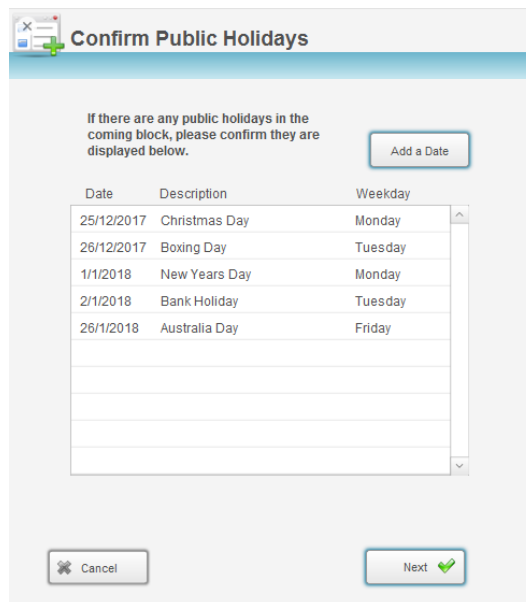
- Click once on the **Splash** icon on the top left corner of your screen.
- Select the **Session** icon



- Go to the **Scripts** menu to select **Rollover Sessions to Next Block**.



- The **Confirm Public Holidays** dialog box will be displayed on your screen.

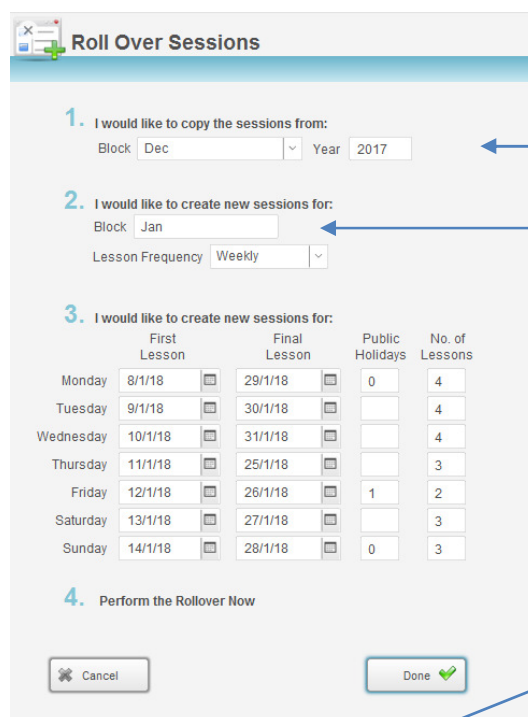


Confirm Public Holidays

If there are any public holidays in the coming block, please confirm they are displayed below.

Date	Description	Weekday
25/12/2017	Christmas Day	Monday
26/12/2017	Boxing Day	Tuesday
1/1/2018	New Years Day	Monday
2/1/2018	Bank Holiday	Tuesday
26/1/2018	Australia Day	Friday

5. Confirm all public holidays for the coming term are displayed. Click the **Add a Date** button to enter any missing statutory holidays.
6. Click the **Next** button to progress to the next stage of the rollover.
7. The **Rollover Sessions** dialog box will be displayed on your screen.
8. At Step 1 of the dialog you are required to enter the Term/Block and Year you wish to rollover (your current term).



Rollover Sessions

1. I would like to copy the sessions from:
 Block Year

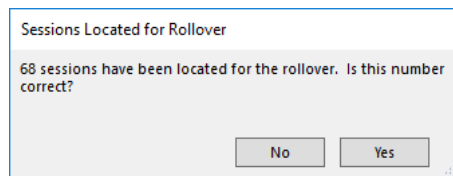
2. I would like to create new sessions for:
 Block
 Lesson Frequency

3. I would like to create new sessions for:

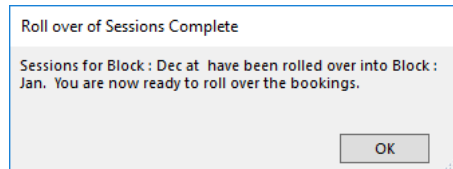
	First Lesson		Final Lesson		Public Holidays	No. of Lessons
Monday	<input type="text" value="8/1/18"/>	<input type="checkbox"/>	<input type="text" value="29/1/18"/>	<input type="checkbox"/>	0	4
Tuesday	<input type="text" value="9/1/18"/>	<input type="checkbox"/>	<input type="text" value="30/1/18"/>	<input type="checkbox"/>		4
Wednesday	<input type="text" value="10/1/18"/>	<input type="checkbox"/>	<input type="text" value="31/1/18"/>	<input type="checkbox"/>		4
Thursday	<input type="text" value="11/1/18"/>	<input type="checkbox"/>	<input type="text" value="25/1/18"/>	<input type="checkbox"/>		3
Friday	<input type="text" value="12/1/18"/>	<input type="checkbox"/>	<input type="text" value="26/1/18"/>	<input type="checkbox"/>	1	2
Saturday	<input type="text" value="13/1/18"/>	<input type="checkbox"/>	<input type="text" value="27/1/18"/>	<input type="checkbox"/>		3
Sunday	<input type="text" value="14/1/18"/>	<input type="checkbox"/>	<input type="text" value="28/1/18"/>	<input type="checkbox"/>	0	3

4. Perform the Rollover Now

9. At Step 2 enter the name of the Term/Block that you would like to create.
10. Enter the start date and end dates for each weekday of the new block. After entering the Monday dates Splash will automatically fill the remaining dates. Amend any date which is not displayed correctly.
11. Splash will automatically calculate the number of sessions that will be conducted on each weekday.
12. Click the **Done** button.
13. Splash will display a dialog confirming the number of sessions that have been located for the rollover. Click **Yes** to continue, or **No** to exit the rollover.



14. Splash will now copy the selected timetable into the next block. When the process is complete the new timetable will be displayed on your screen. Each record will contain with the same weekday, time, and instructor as the copied block. The start date and term/year fields will be updated to display the details of the coming term.



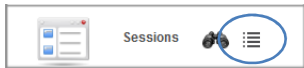
You have now successfully rolled over from one term to the next. If you wish to copy your bookings as well please see the instructions for “Rolling Over Bookings to Next Term”.

Importing Session Data

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

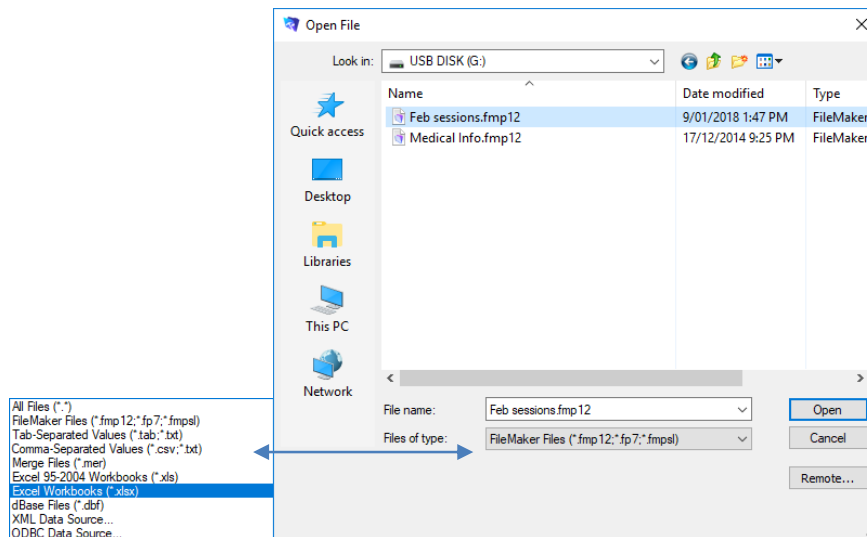
- add new records from the source file
- update existing records with information from the source file
- update matching records with information from the source file

Importing Records from Excel

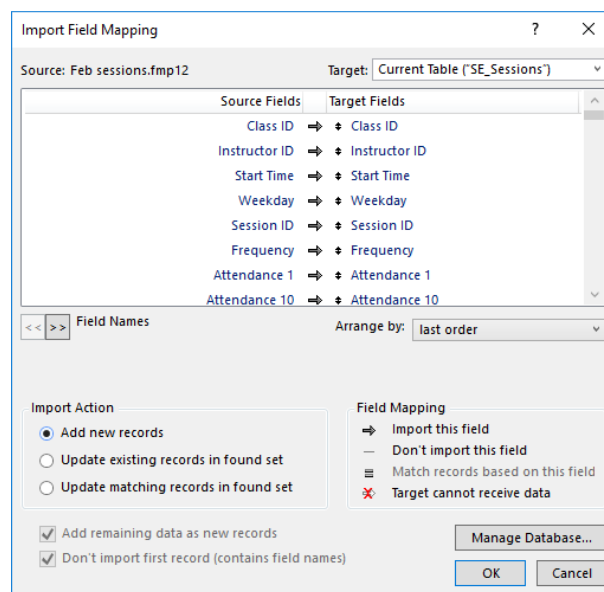
1. Click once on the **Splash** icon on the top left corner of your screen.
 2. Select the **Session List** icon
- 
3. The Session List View screen will be displayed.
 4. Select **Import Session Data** from the **Scripts** menu.



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



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



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

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



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

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

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

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

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

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

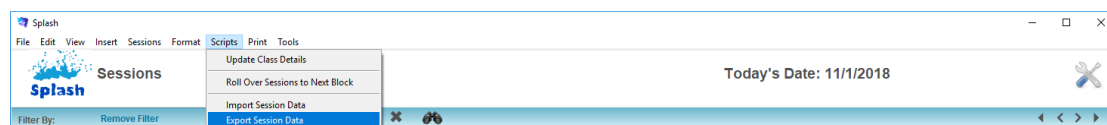
11. When all fields have been aligned correctly, click the **Import** button.

Exporting Session Data

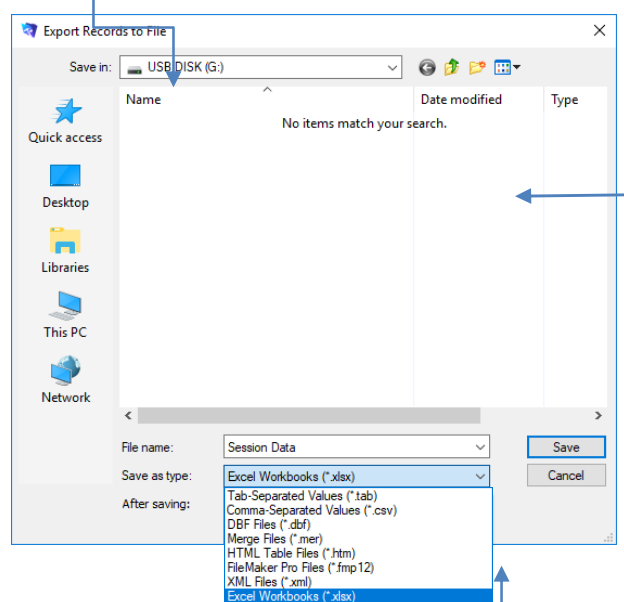
You can export Splash data to a new file and then open it in another application. For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

Exporting Records to Excel

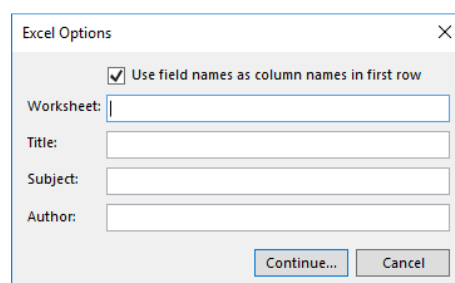
1. Use the **Finding a Session** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Session Data** from the **Scripts** menu.



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

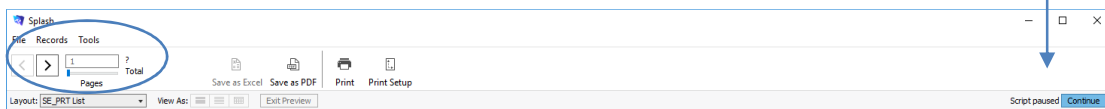


6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.

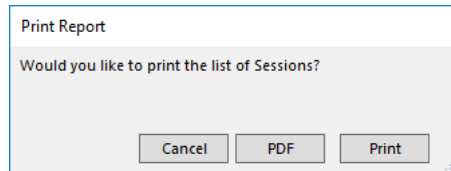


8. The **Specify Field Order for Export** dialog will be displayed on your screen. Use this dialog to indicate the order of the fields in which Splash will export the data.
9. All fields displayed in the **Field Export Order** list will be exported.

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



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



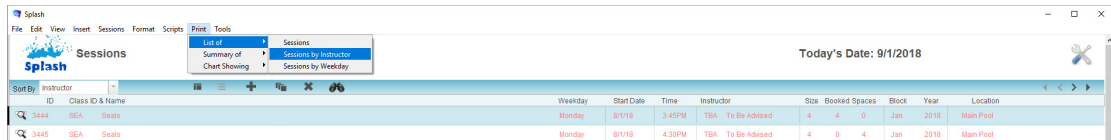
- Click **Print** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Weekday	Time	Session	Class Name	Instructor	Class Size	Bookings	Spaces
Monday	3:45 PM	3444	Seals	To Be Advised	4	4	0
Monday	4:30 PM	3445	Seals	To Be Advised	4	0	4
Monday	5:15 PM	3446	Seals	To Be Advised	4	1	3
Monday	3:30 PM	3447	Turtles	Brian Roberts	8	1	7
Monday	4:00 PM	3448	Turtles	Brian Roberts	8	1	7
Monday	4:30 PM	3449	Turtles	Brian Roberts	8	3	4
Monday	5:00 PM	3450	Turtles	Brian Roberts	8	0	8
Monday	5:30 PM	3451	Turtles	Brian Roberts	8	0	8
Wednesday	9:00 AM	3452	Turtles	Brian Roberts	8	2	6
Wednesday	9:30 AM	3453	Turtles	Brian Roberts	8	0	8
Wednesday	10:00 AM	3454	Turtles	Brian Roberts	8	0	8
Wednesday	10:30 AM	3455	Turtles	Brian Roberts	8	0	8
Thursday	9:30 AM	3456	Shrimps	Brian Roberts	8	3	5
Thursday	10:00 AM	3457	Shrimps	Brian Roberts	8	3	5
Thursday	10:30 AM	3458	Shrimps	Brian Roberts	8	0	8
Thursday	11:00 AM	3459	Turtles	Brian Roberts	8	2	6

Printing a List of Sessions by Instructor

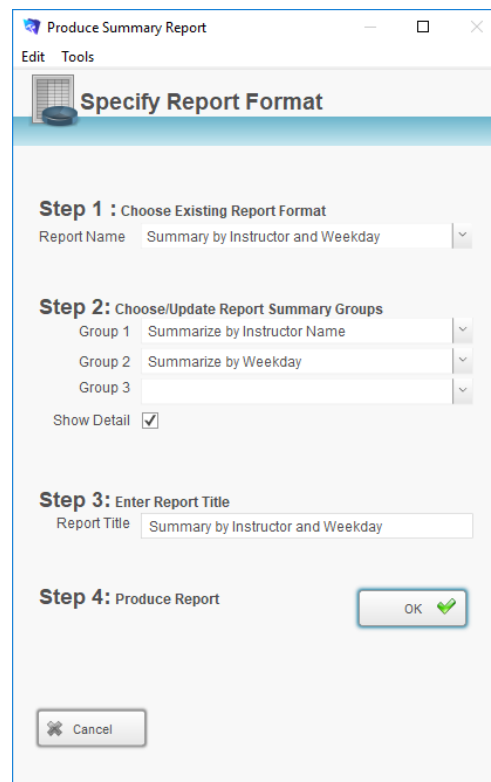
This report displays the occupancy rates and total number of bookings received for each session for a selected day. The information in this report is grouped by Instructor and Weekday.

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



ID	Class ID & Name	Weekday	Start Date	Time	Instructor	Size	Booked Spaces	Block	Year	Location
3444	SEA Seals	Monday	9/1/18	3:45PM	TBA To Be Assigned	4	4	0	Jan 2018	Main Pool
3445	SEA Seals	Monday	9/1/18	4:30PM	TBA To Be Assigned	4	0	4	Jan 2018	Main Pool

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



Produce Summary Report

Edit Tools

Specify Report Format

Step 1 : Choose Existing Report Format
Report Name Summary by Instructor and Weekday

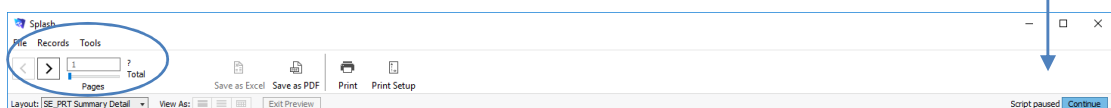
Step 2: Choose/Update Report Summary Groups
Group 1 Summarize by Instructor Name
Group 2 Summarize by Weekday
Group 3
Show Detail ☒

Step 3: Enter Report Title
Report Title Summary by Instructor and Weekday

Step 4: Produce Report
OK

Cancel

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



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

Print Report

Would you like to print the selected report?

Cancel

PDF

Print

- Click **Print** to print the report or Cancel to return to your original screen without printing.

Print Report by Instructor (Show Detail)

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

Summary of Sessions						
Summary by Instructor and Weekday						
			# of Sessions	Bookings	Current Catchups	% Full
Barbara Smith			11	6	0	72
Monday			5	6	0	24
3:30 PM	Mon	Penguin	BS	3		3
4:00 PM	Mon	Penguin	BS	2		4
4:30 PM	Mon	Penguin	BS	1		5
5:00 PM	Mon	Penguin	BS	0		6
5:30 PM	Mon	Penguin	BS	0		6
Sunday			6			48
9:00 AM	Sun	Turtles	BS	0		8
9:30 AM	Sun	Turtles	BS	0		8
10:00 AM	Sun	Turtles	BS	0		8
10:30 AM	Sun	Turtles	BS	0		8
11:00 AM	Sun	Turtles	BS	0		8
11:30 AM	Sun	Turtles	BS	0		8

Print Report by Instructor (No Detail)

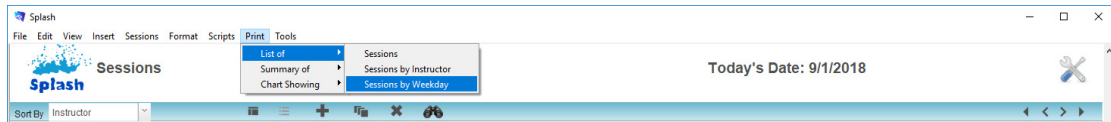
When the Summary Report dialog is displayed on your screen you have the choice to include or exclude detail in the report. The sample below shows the report when Show Detail is NOT selected.

Summary of Sessions						
Summary by Instructor and Weekday						
			# of Sessions	Bookings	Current Catchups	% Full
Barbara Smith			11	6	0	72
Monday			5	6	0	24
Sunday			6			48
Brian Roberts			14	18	1	95
Monday			5	7	1	34
Wednesday			4	2	0	30
Thursday			5	9	0	31

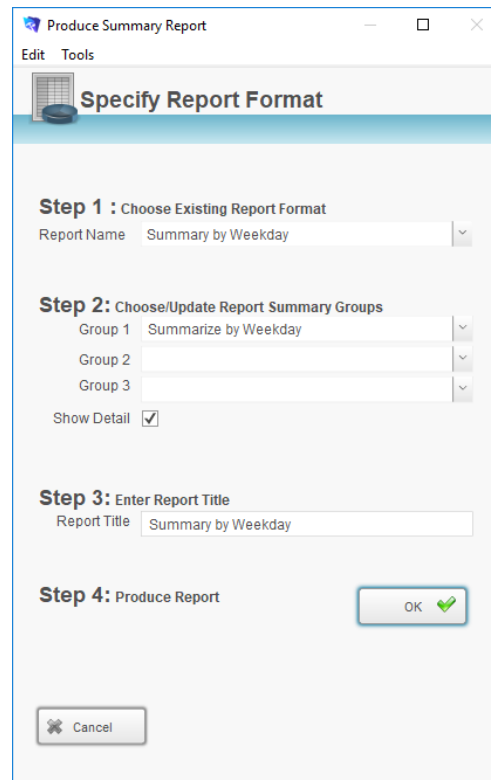
Printing a List of Sessions by Weekday

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

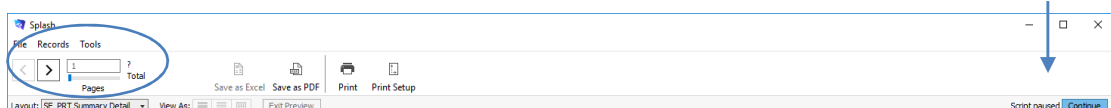
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Sessions by Weekday** from the pop-out menu displayed.



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



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



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

Print Report

Would you like to print the selected report?

Cancel

PDF

Print

- Click **Print** to print the report or Cancel to return to your original screen without printing.

Print Report by Weekday (Show Detail)

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

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Weekday									
Monday				18	21	1	92	1.1	19%
3:45 PM	Mon	Seals	TBA	4	0		4		
4:30 PM	Mon	Seals	TBA	0			4		
5:15 PM	Mon	Seals	TBA	1			3		
3:30 PM	Mon	Turtles	BR	1			7		
4:00 PM	Mon	Turtles	BR	1			7		
4:30 PM	Mon	Turtles	BR	3			4		
5:00 PM	Mon	Turtles	BR	0			8		
5:30 PM	Mon	Turtles	BR	0			8		
3:30 PM	Mon	Jellyfish	DS	0			6		
4:00 PM	Mon	Jellyfish	DS	3			3		
4:30 PM	Mon	Jellyfish	DS	0			6		
5:00 PM	Mon	Jellyfish	DS	0			6		

Print Report by Weekday (No Detail)

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

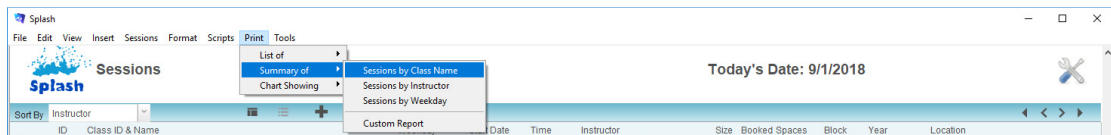
Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Weekday									
Monday				18	21	1	92	1.1	19%
Tuesday				4	6	0	16	1.5	33%
Wednesday				9	3	0	59	0.3	5%
Thursday				10	14	0	66	1.4	18%
Friday				11	2	0	64	0.2	3%
Sunday				16			116	0.0	0%
Total Reported				68	46	1	413	0.6	11%

Printing a Summary of Sessions by Class Name

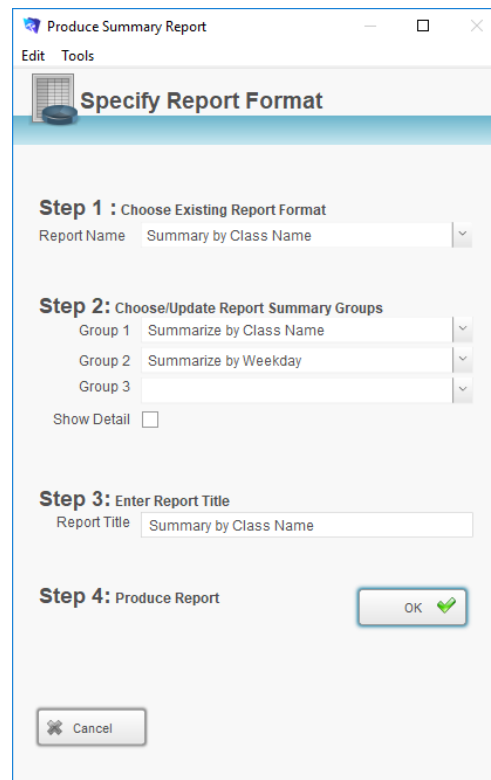
This report displays the average class size, total number of bookings, and spaces remaining for each class type on a selected day.

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

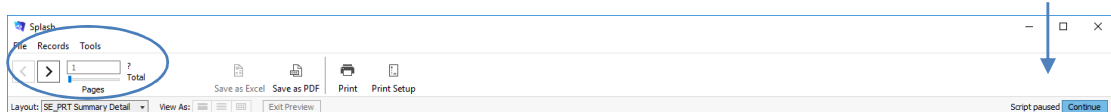
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Sessions by Class Name** from the pop-out menu displayed.



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



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



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

Print Report

Would you like to print the selected report?

Cancel
PDF
Print

- Click **Print** to print the report or Cancel to return to your original screen without printing.

Print Report by Class Name (Show Detail)

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

Summary of Sessions						
Summary by Class Name						
			# of Sessions	Bookings	Current Catchups	% Full
Jellyfish			9	5	0	49
Monday			5	3	0	27
3:30 PM	Mon	Jellyfish	DS	0		6
4:00 PM	Mon	Jellyfish	DS	3		3
4:30 PM	Mon	Jellyfish	DS	0		6
5:00 PM	Mon	Jellyfish	DS	0		6
5:30 PM	Mon	Jellyfish	DS	0		6
Tuesday			3	2	0	16
3:30 PM	Tue	Jellyfish	HS	0		6
4:00 PM	Tue	Jellyfish	HS	2		4
4:30 PM	Tue	Jellyfish	HS	0		6

Print Report by Class Name (No Detail)

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

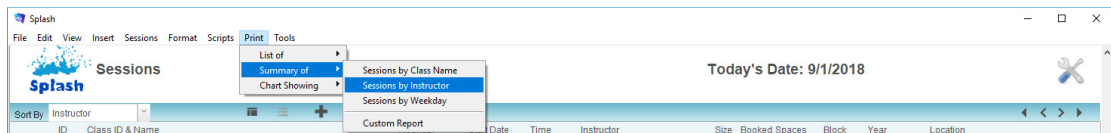
Summary of Sessions						
Summary by Class Name						
			# of Sessions	Bookings	Current Catchups	% Full
Dolphins			1			6
Sunday			1			6
Jellyfish			9	5	0	49
Monday			5	3	0	27
Tuesday			3	2	0	16
Friday			1			6
Penguin			19	9	0	105
Monday			5	6	0	24
Wednesday			5	1	0	29
Friday			4	2	0	22
Sunday			5			30

Printing a Summary of Sessions by Instructor

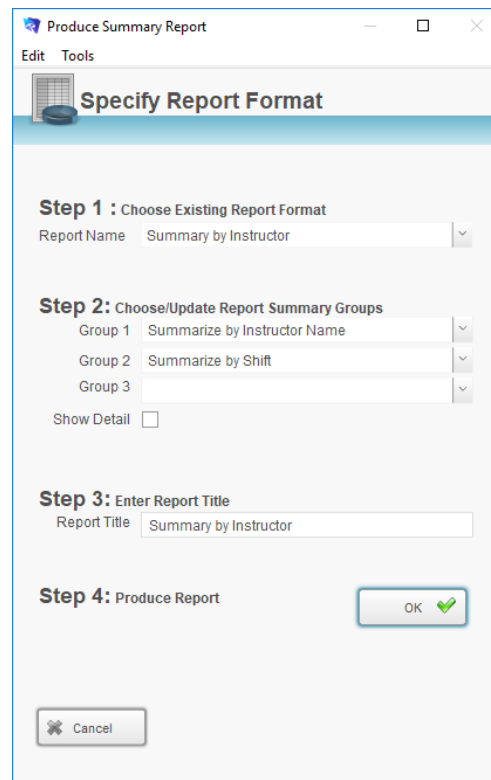
This report displays the average class size, total number of bookings, and spaces remaining for each class on a selected day.

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

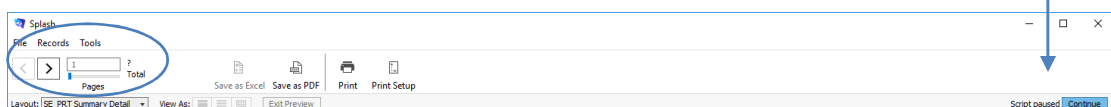
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Sessions by Instructor** from the pop-out menu displayed.



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



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



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

Print Report

Would you like to print the selected report?

Cancel

PDF

Print

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

Print Report by Instructor (Show Detail)

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

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Instructor									
Barbara Smith				11	6	0	72	0.5	9%
Afternoon				5	6	0	24	1.2	20%
3:30 PM	Mon	Penguin	BS	3			3		
4:00 PM	Mon	Penguin	BS	2			4		
4:30 PM	Mon	Penguin	BS	1			5		
5:00 PM	Mon	Penguin	BS	0			6		
5:30 PM	Mon	Penguin	BS	0			6		
Morning				6			48	0.0	0%
9:00 AM	Sun	Turtles	BS	0			8		
9:30 AM	Sun	Turtles	BS	0			8		
10:00 AM	Sun	Turtles	BS	0			8		

Print Report by Instructor (No Detail)

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

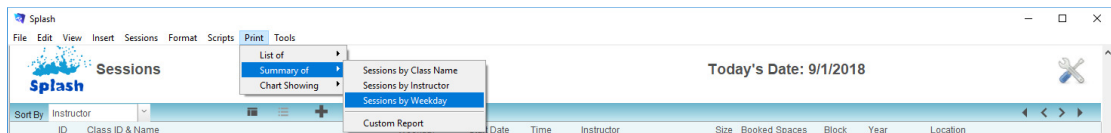
Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Instructor									
Barbara Smith				11	6	0	72	0.5	9%
Afternoon				5	6	0	24	1.2	20%
Morning				6			48	0.0	0%
Brian Roberts				14	18	1	95	1.1	14%
Afternoon				5	7	1	34	1.0	13%
Morning				9	11	0	61	1.2	15%
David Smith				14	8	0	94	0.6	8%
Afternoon				9	3	0	59	0.3	6%
Morning				5	5	0	35	1.0	13%
Harry Sims				10	6	0	52	0.6	13%
Afternoon				10	6	0	52	0.6	13%

Printing a Summary of Sessions by Weekday

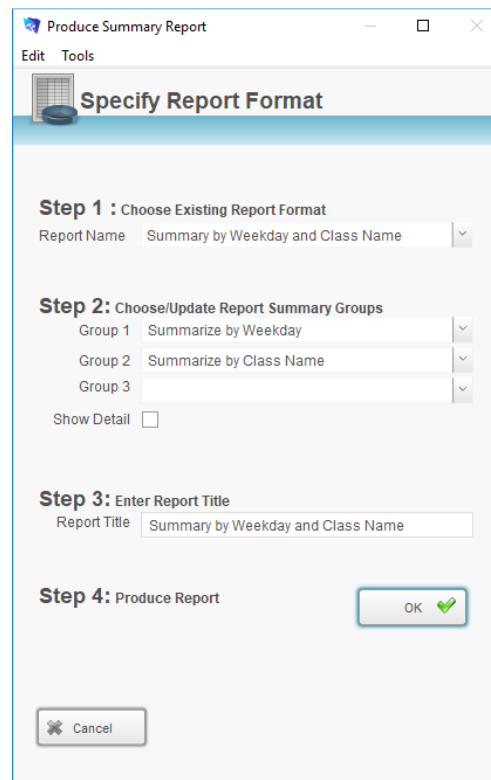
This report displays the average class size, total number of bookings, and spaces remaining for each class on a selected day.

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

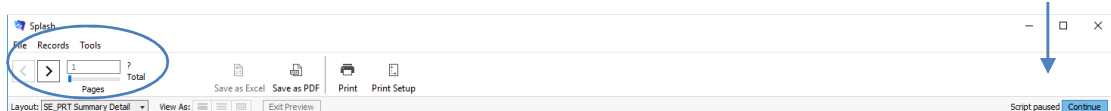
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Sessions by Weekday** from the pop-out menu displayed.



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



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



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

Print Report

Would you like to print the selected report?

Cancel
PDF
Print

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

Print Report by Weekday (Show Detail)

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

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Weekday and Class Name									
Monday				18	21	1	92	1.1	19%
Jellyfish				5	3	0	27	0.6	10%
3:30 PM	Mon	Jellyfish	DS	0			6		
4:00 PM	Mon	Jellyfish	DS	3			3		
4:30 PM	Mon	Jellyfish	DS	0			6		
5:00 PM	Mon	Jellyfish	DS	0			6		
5:30 PM	Mon	Jellyfish	DS	0			6		
Penguin				5	6	0	24	1.2	20%
3:30 PM	Mon	Penguin	BS	3			3		
4:00 PM	Mon	Penguin	BS	2			4		
4:30 PM	Mon	Penguin	BS	1			5		
5:00 PM	Mon	Penguin	BS	0			6		

Print Report by Weekday (No Detail)

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

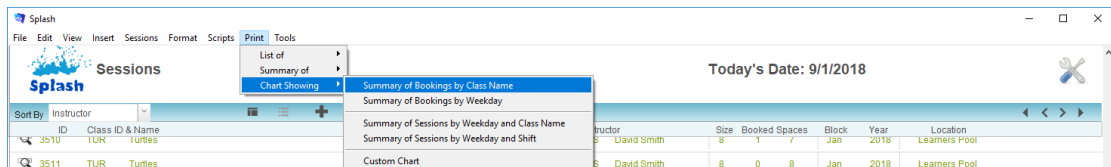
Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Weekday and Class Name									
Monday				18	21	1	92	1.1	19%
Jellyfish				5	3	0	27	0.6	10%
Penguin				5	6	0	24	1.2	20%
Seals				3	5	0	7	1.7	42%
Turtles				5	7	1	34	1.0	13%
Tuesday				4	6	0	16	1.5	33%
Jellyfish				3	2	0	16	0.7	11%
Starfish				1	4	0	0	4.0	100%
Wednesday				9	3	0	59	0.3	5%
Penguin				5	1	0	29	0.2	3%

Print Chart Showing Summary of Bookings by Class Name

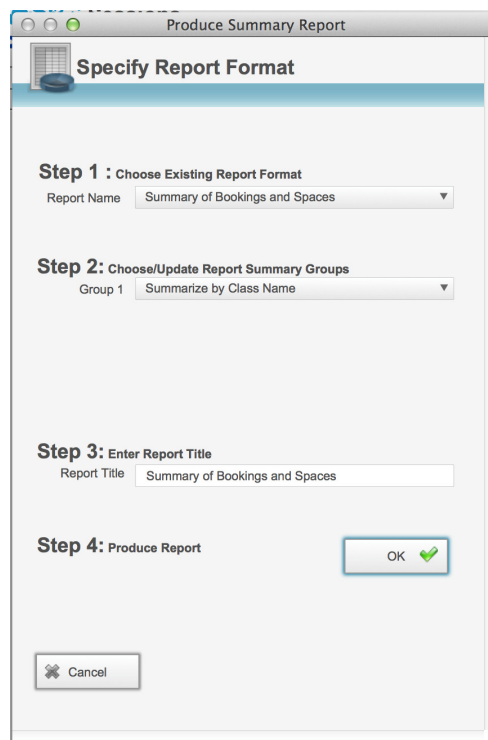
This report displays as a graph; it shows the number of bookings and the number of spaces remaining across each class type for the found set of records. The report can be customised to include exits.

The information in this report is grouped by Class Name.

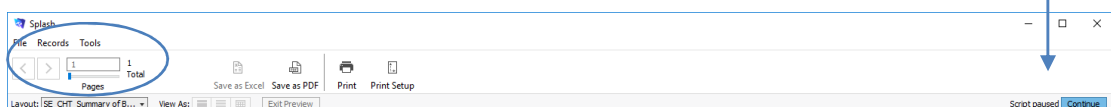
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Summary of Bookings by Class Name** from the pop-out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

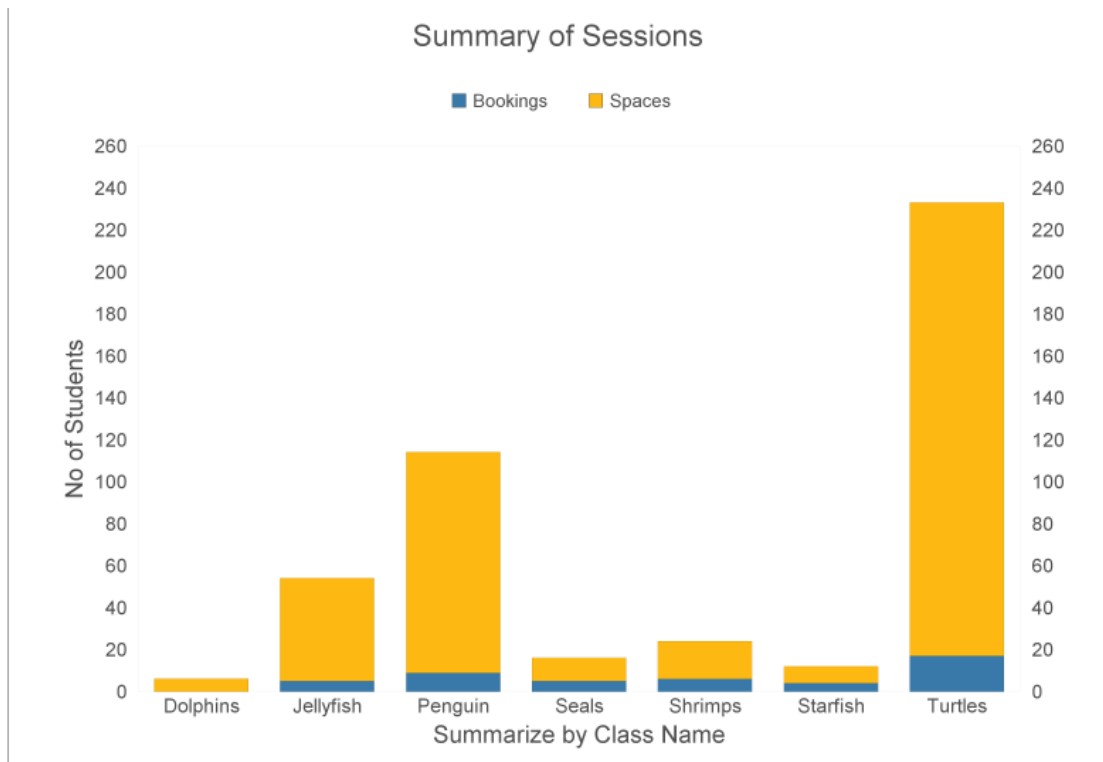


4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary of Bookings and Spaces
Step 2 = Group 1 set to Summarize by Class Name
Step 3 = Report Name set to Summary of Bookings and Spaces
6. Amend the grouping options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

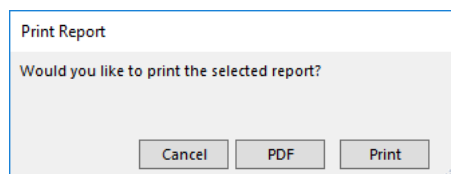


7. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).





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



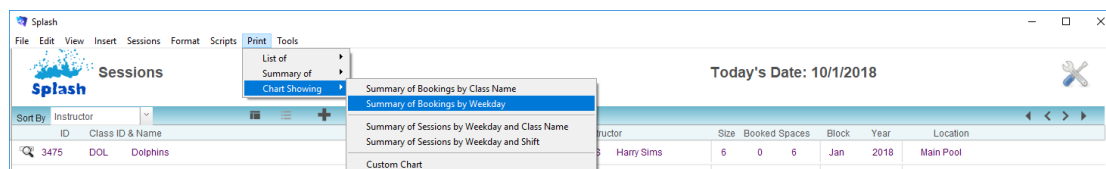
- Click **Print** to print the report or Cancel to return to your original screen without printing.

Print Chart Showing Summary of Bookings by Weekday

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

The information in this report is grouped by Weekday.

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



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

Produce Summary Report

Edit Tools

Specify Report Format

Step 1 : Choose Existing Report Format
 Report Name: Summary of Bookings and Spaces

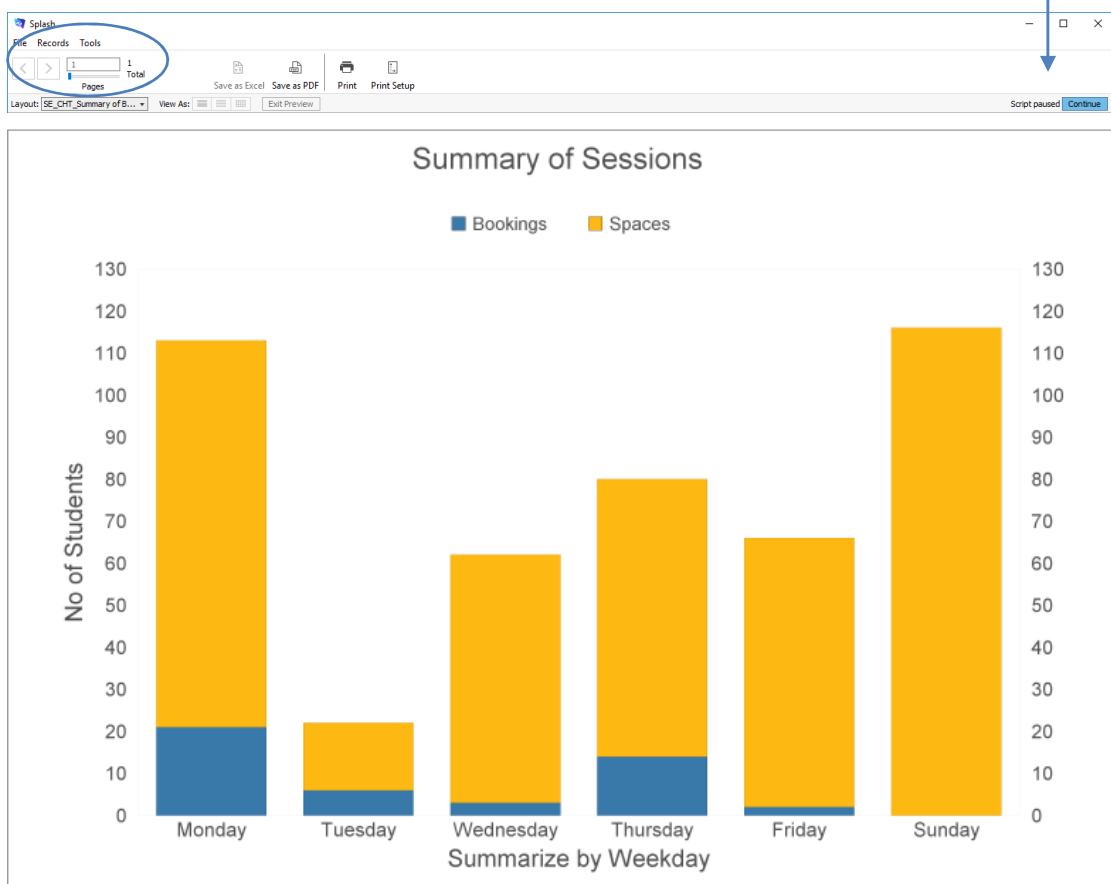
Step 2: Choose/Update Report Summary Groups
 Group 1: Summarize by Weekday

Step 3: Enter Report Title
 Report Title: Summary of Bookings and Spaces

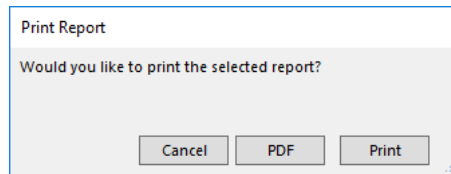
Step 4: Produce Report
 OK ☒

Cancel

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



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



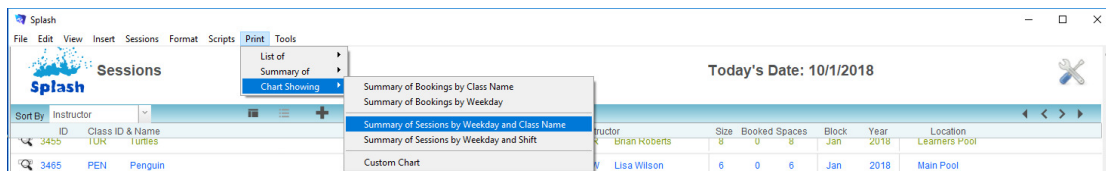
9. Click **Print** to print the report or Cancel to return to your original screen without printing.

Print Chart Showing Summary of Bookings by Weekday and Class Name

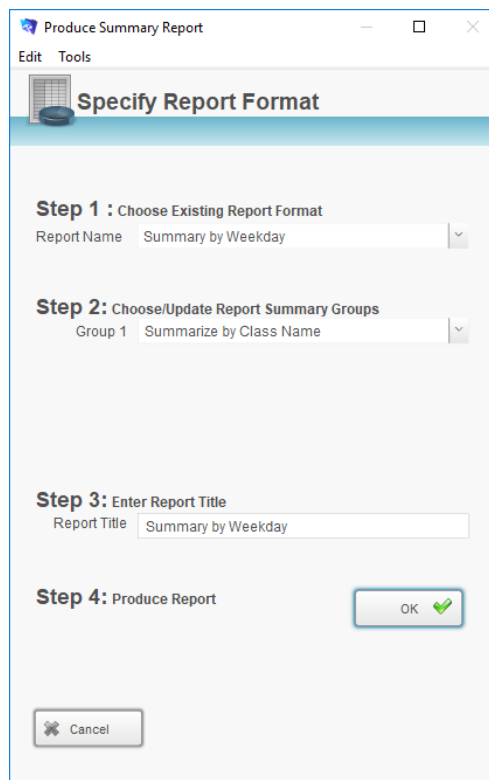
This report displays as a graph; it shows the number of bookings for each weekday within each class for the found set of records.

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

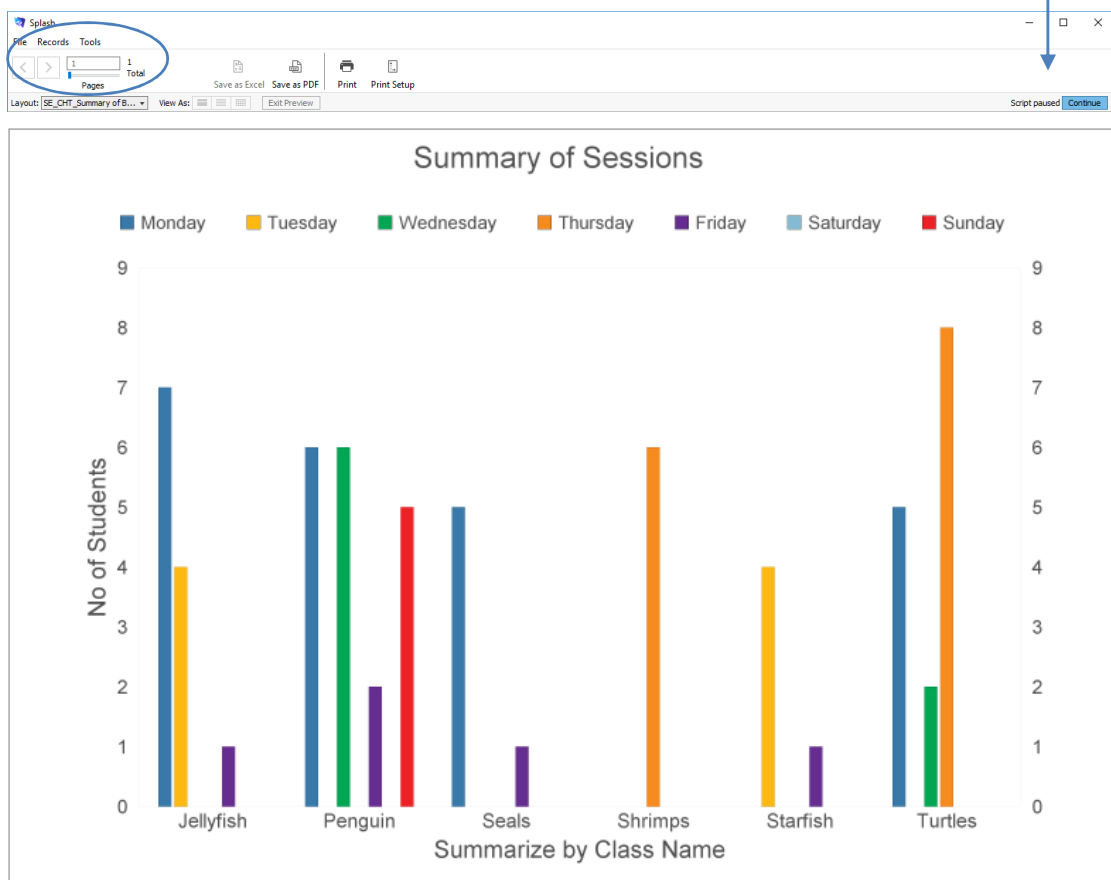
1. Use the **Finding a Session** function to locate the required sessions.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Sessions by Weekday and Class Name** from the pop-out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



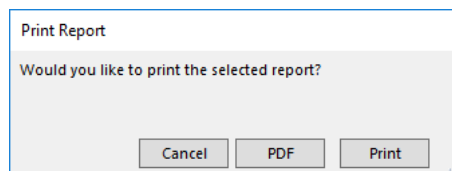
4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
 Step 1 = Summary by Weekday
 Step 2 = Group 1 set to Summarize by Class Name
 Step 3 = Report Name set to Summary by Weekday
6. Amend the grouping options at Step 2 if required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



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



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



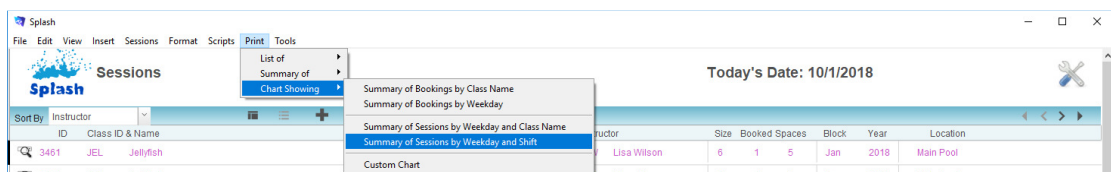
- Click **Print** to print the report or Cancel to return to your original screen without printing.

Print Chart Showing Summary of Bookings by Weekday and Shift

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

The information in this report is grouped by Weekday.

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



- 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.

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 Shift

Step 3: Enter Report Title
Report Title Summary by Weekday

Step 4: Produce Report
OK

Cancel

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

Splash

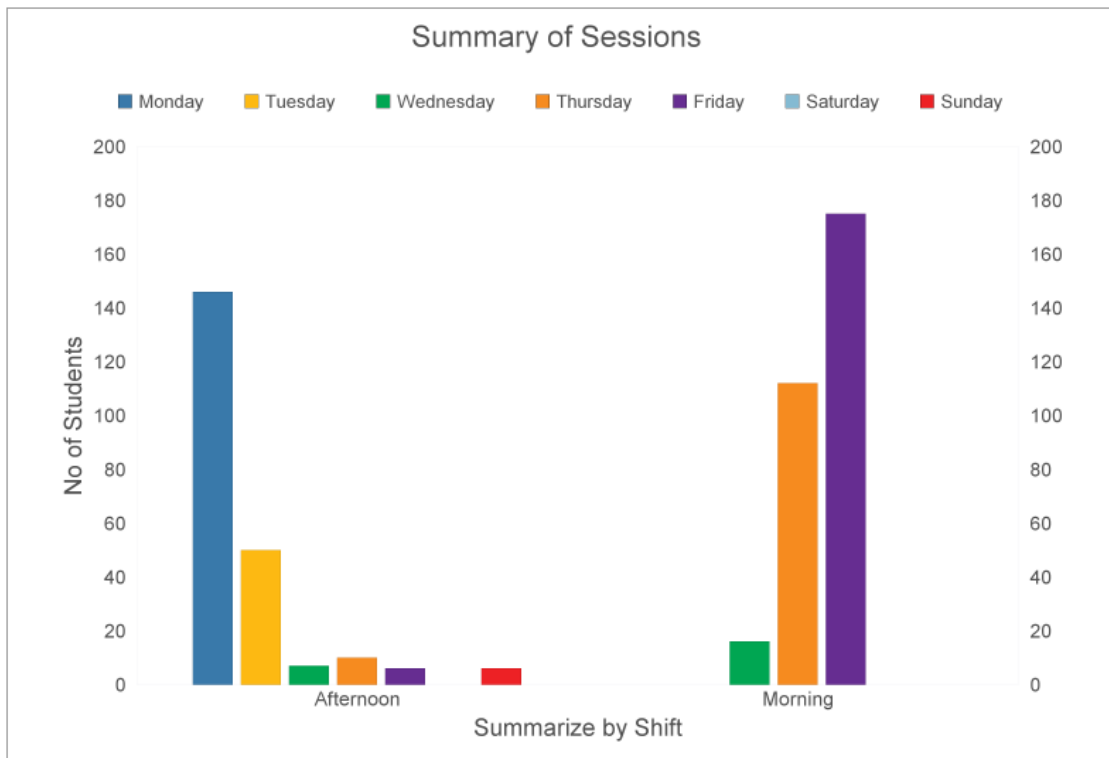
File Records Tools

Pages 1 Total 1

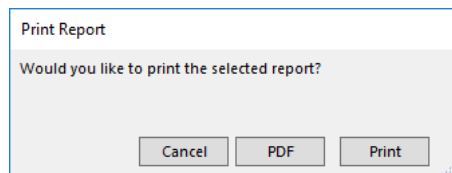
Save as Excel Save as PDF Print Print Setup

Layout: SE_CHT_Summary of S... View As: Exit Preview

Script paused Continue



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



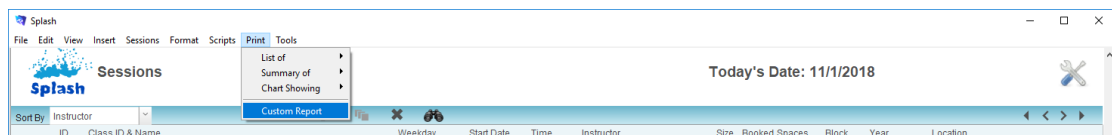
9. Click **Print** to print the report or Cancel to return to your original screen without printing.

Printing a Custom Report

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

Displaying the Custom Report Dialog

1. Use the **Finding a Session** function to locate the group of students you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Custom Report ...** from the Print menu.



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

Produce Summary Report

Edit Tools

Specify Report Format

Step 1 : Choose Existing Report Format
Report Name: Summary by Instructor and Class Name

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

Step 3: Enter Report Title
Report Title: Summary by Instructor and Class Name

Step 4: Produce Report
OK

Defining a Custom Report

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

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

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

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

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

Defining a Summary Report (Show Detail)

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

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Instructor and Class Name									
Barbara Smith				11	6	0	72	0.5	9%
Penguin				5	6	0	24	1.2	20%
3:30 PM	Mon	Penguin	BS		3		3		
4:00 PM	Mon	Penguin	BS		2		4		
4:30 PM	Mon	Penguin	BS		1		5		
5:00 PM	Mon	Penguin	BS		0		6		
5:30 PM	Mon	Penguin	BS		0		6		
Turtles				6			48	0.0	0%
9:00 AM	Sun	Turtles	BS		0		8		
9:30 AM	Sun	Turtles	BS		0		8		
10:00 AM	Sun	Turtles	BS		0		8		
10:30 AM	Sun	Turtles	BS		0		8		
11:00 AM	Sun	Turtles	BS		0		8		
11:30 AM	Sun	Turtles	BS		0		8		

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

Defining a Summary Report (No Detail)

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

Summary of Sessions				# of Sessions	Bookings	Current Catchups	Spaces	Avg Class Size	% Full
Summary by Instructor and Class Name									
Barbara Smith				11	6	0	72	0.5	9%
Penguin				5	6	0	24	1.2	20%
Turtles				6			48	0.0	0%
Brian Roberts				14	18	1	95	1.1	14%
Shrimps				3	6	0	18	2.0	25%
Turtles				11	12	1	77	0.9	11%
David Smith				14	12	0	90	0.9	13%
Jellyfish				5	7	0	23	1.4	23%
Turtles				9	5	0	67	0.6	7%
Harry Sims				10	14	0	44	1.4	27%
Dolphins				1	1	0	5	1.0	17%
Jellyfish				3	4	0	14	1.3	22%
Penguin				5	5	0	25	1.0	17%
Starfish				1	4	0	0	4.0	100%

Defining Student Details

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

The Student Record

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

The screenshot shows the 'Students' module in the Splash software. The interface includes a menu bar (File, Edit, View, Insert, Format, Students, Scripts, Print, Tools) and a toolbar. The main area displays the student record for Jacob (Jake) Smith, Student ID 13. The record includes fields for Name, Preferred Name, Date of Birth, Age, Gender, Medical Conditions, and a photo. A list of family members is shown on the right, including Lucas Smith, Sam Smith, and Nicholas Smith. At the bottom, there are tabs for Bookings, Catchups, Waiting List, Achievements, Correspondence, and Comments/Custom. The Bookings tab is active, showing a table of enrolments.

Total Enrolments (11)						Block/Year	
11/01/18	Thu	3:30 PM	Jacob (Jake) Smith	Penguin	Jan	2018	
10/01/18	Wed	4:00 PM	Jacob (Jake) Smith	Penguin	Jan	2018	
6/12/17	Wed	4:00 PM	Jacob (Jake) Smith	Penguin	Dec	2017	
4/12/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Dec	2017	
6/11/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Nov	2017	
6/11/17	Mon	4:00 PM	Jacob (Jake) Smith	Penguin	Nov	2017	
2/10/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Oct	2017	
4/09/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Sep	2017	

Reason for Lessons: First Swim 5/6/17, Age First Swim 4.9. Exit Reason: Exit Date, Last Swim 31/1/18, Age Last Swim 5.5.

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

The screenshot shows the 'Primary Contact' tab in the Splash software. It displays the contact information for Martha Taylor, Mother. The contact information includes Name, Relationship, Email, Default Telephone, and Mobile. There is an SMS icon next to the Mobile number. The 'Other Contact' section is also visible, with fields for Name and Mobile.

Primary Contact

Name: Martha Taylor

Relationship: Mother

Email: computerize@xtra.co.nz

Default Telephone: 0272222082

Mobile: 0272222082

Other Contact

Name: Other Contact Name

Mobile: Mobile Telephone

NB: Send a SMS directly to the selected family by clicking the SMS icon to the left of the Mobile telephone number. The SMS button will only be displayed if the client has a mobile number recorded.

Student Bookings – The Bookings tab card within the student file displays a list of all bookings made for the selected student. Each booking line displays the payment status, day, time, class name, and block. Exited bookings are also displayed in the list, however they are colour coded for easy identification. Navigate quickly to a selected booking by clicking the magnifier to the left of the required booking.

The screenshot shows the 'Students' window in the Splash application. The 'Bookings' tab is selected, displaying a list of bookings for Student ID 13. A blue box highlights the magnifier icon next to a booking on 11/01/18. The interface includes a sidebar with a list of students, a central form for student details, and a right-hand panel for contact information and family members.

Bookings	Catchups	Waiting List	Achievements	Correspondence	Comments/Custom
Total Enrolments (11)					
11/01/18	Thu	3:30 PM	Jacob (Jake) Smith	Penguin	Jan 2018
10/01/18	Wed	4:00 PM	Jacob (Jake) Smith	Penguin	Jan 2018
8/12/17	Wed	4:00 PM	Jacob (Jake) Smith	Penguin	Dec 2017
4/12/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Dec 2017
6/11/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Nov 2017
6/11/17	Mon	4:00 PM	Jacob (Jake) Smith	Penguin	Nov 2017
2/10/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Oct 2017
4/09/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Sep 2017

Catchup and Makeup Lessons – Displayed in the second tab card; this card displays past, current, and future makeup lessons. Each lesson is colour coded for easy identification of status.

The screenshot shows the 'Students' window in the Splash application. The 'Catchups' tab is selected, displaying a list of catchup lessons for Student ID 13. The interface includes a sidebar with a list of students, a central form for student details, and a right-hand panel for contact information and family members.

Bookings	Catchups	Waiting List	Achievements	Correspondence	Comments/Custom
19/01/18	Fri	10:30 AM	Jacob (Jake) Smith	Penguin	Jan 2018
12/01/18	Fri	8:30 AM	Jacob (Jake) Smith	Penguin	Jan 2018

Waiting List – Displayed in the third tab card; Waiting List displays a list of all sessions the student is currently waitlisted on. Remove the student from a waiting list by clicking the red cross on the right of the row you wish to remove

The screenshot shows the 'Waiting List' tab selected. The left sidebar lists students filtered by 'jac', with 'Jacob (Jake) Smith' selected. The main area displays student details for Jacob Smith (ID 13), including name, preferred name, date of birth, age, gender, medical conditions, and a photo. The bottom section shows a table of waiting list sessions.

Weekday	Class	Block	Year
11/01/18 Fri 11:00 AM	Penguin	To Be Advised	Jan 2018
Can only swim Fridays from January 2018			

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

The screenshot shows the 'Achievements' tab selected. The left sidebar lists students filtered by 't', with 'Bobby Thomson' selected. The main area displays student details for Bobby Thomson (ID 13). The bottom section shows a table of achievements.

Weekday	Class	Block	Year
PENGUIN	1 Blowing Bubbles Eyes Under		
PENGUIN	2 Freestyle kick with board		
PENGUIN	3 A torpedo		
PENGUIN	4 4 circle arms		
PENGUIN	5 Back Kick		

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

The screenshot shows the 'Correspondence' tab selected. The left sidebar lists students, with 'Jacob (Jake) Smith' selected. The main area displays student details: Name (Jacob Smith), Preferred (Jake), Date of Birth (22/7/2012), Age (5.5m), Gender (Male), and Medical Conditions. A 'Comments' text area is present. On the right, a 'Contact People' list shows family members: Lucas Smith (5.7m, Penguin), Sam Smith (6.3m), and Nicholas Smith (6.3m, Turtles). The bottom section shows a list of correspondence items:

Date	Type	From	To	Subject
11/01/18	Letter	Jacob Smith		Happy Birthday
11/01/18	Booking	Barbara Smith		Swim School Multiple Booking Confirmation

A 'Create Correspondence' button is visible in the top right of the correspondence list.


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

The screenshot shows the 'Comments/Custom' tab selected. The left sidebar is the same. The main area displays student details. The bottom section shows a 'Comments' text area and a list of custom fields:

- Mums Occupation
- Dads Occupation: Electrician
- Custom Text 3
- Custom Text 4
- Custom Text 5
- Custom Date 1
- Custom Date 2

Listing Student 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.



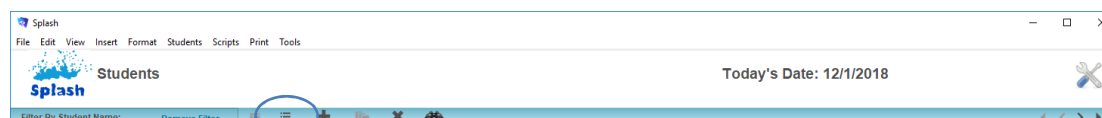
ID	Last Name	First Name	Age	Address	Contact	Discount	Telephone	Last Swim (Date / Class)
13	Smith	Jacob	5_5m	6A Erlestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	10%	Percent	0272222082 31/1/18 Penguin
15	Smith	Sam	6_3m	6A Erlestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	1.5%	Percent	0272222082
17	Smith	Nicholas	6_3m	6A Erlestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	1%	Percent	0272222082 25/1/18 Turtles
19	Smith	Jason	6_4m	89 Roberta Road, Tawa 4008	Daniel Smith	10%	Percent	0272222082 8/1/18 Turtles
21	Brown	Bobby	4_11m	345 Nowhere St, Brooklyn, Wellington 4009	Sam Brown	10%	Percent	0272222082
23	Anderson	Jamie	3_6m	876 Somewhere Rd, Tawa, Wellington 4010	David Anderson	10%	Percent	0272222082 29/1/18 Jellyfish
25	Anderson	Amelia	2_7m	876 Somewhere Rd, Tawa, Wellington 4010	David Anderson	10%	Percent	0272222082
27	zimmerman	Zac	10_0m	786 another road, Porirua, Wellington 4008	Andy zimmerman	10%	Percent	0272222082 29/1/18 Seals
29	zimmerman	Amanda	2_3m	786 another road, Porirua, Wellington 4008	Andy zimmerman	10%	Percent	0272222082
31	Anderson	Sally	3_0m	876 Somewhere Rd, Tawa, Wellington 4010	David Anderson	10%	Percent	0272222082 25/1/18 Shrimps
33	Thomson	Caroline	2_9m	25 Churton Drive, Churton Park, Wellington 4001	Anthony Thomson	10%	Percent	0272222082 25/1/18 Shrimps
35	King	David	3_11m	46 Brooklyn Rd, Brooklyn, Wellington 4008	Nathan King	10%	Percent	0272222082 26/1/18 Penguin
37	Brown	Celia	5_1m	345 Nowhere St, Brooklyn, Wellington 4009	Sam Brown	10%	Percent	0272222082
39	White	Jane	7_1m	76 Moorefield Road, Johnsonville, Wellington 4001	Julie White	10%	Percent	0272222082 30/1/18 Starfish
41	Smith	Phillip	6_1m	89 Roberta Road, Tawa 4008	Daniel Smith	10%	Percent	0272222082 29/1/18 Penguin
65	Jessop	William	4_9m	180 Essex St, Ngalo, Wellington 4007	Tony Jessop	10%	Percent	04 478 3215 25/1/18 Turtles
67	Robinson	Barry	3_11m	46 Hillcrest Road, Johnsonville, Wellington 4007	Nicola Robinson	10%	Percent	0272222082 31/1/18 Penguin

Displaying all (Total of 97)

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

Displaying a List of Students (from Student Details)

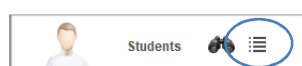
1. Click once on the **List View** button displayed in the blue stripe at the top of your screen.



2. The Student List View screen will be displayed.

Displaying a List of Student (from outside Student screen)

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

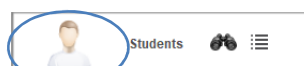


3. The Student List View screen will be displayed

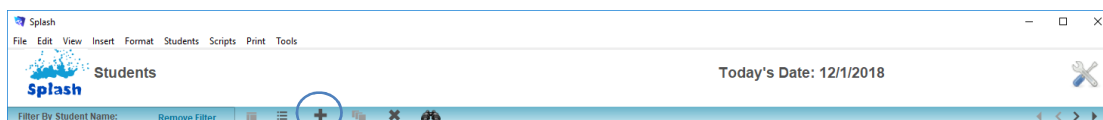
Adding a New Student to an Existing Family

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

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



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



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

6. Enter the Students' First Name and Surname along with any other personal details you may have.
7. Click the Family icon to select the family the student should be linked to.
8. The **Select a Family** dialog will be displayed on your screen. The student surname will automatically be copied to the filter field and all existing families with a matching surname will be displayed.

9. If the family you require is listed, simply click the line displaying the required family name.

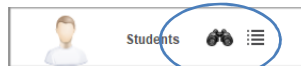
If the required family is not displayed, click the Cancel button and go to the family file to create a new family file.

10. After selecting a family you will be returned to the Add New Student dialog, complete the remaining student details and click **Done**.
11. The information will be saved and you will be returned to the Student detail screen.

The screenshot shows the 'Students' application window. On the left, there is a 'Filter By Student Name' search bar with 'smith' entered and a list of students including Jacob (Jake) Smith, Jason Smith, Jennifer Smith, John Smith, Lucas Smith, Nicholas Smith, Phillip Smith, Sam Smith, and William Smith. The main area displays the details for Student ID 39304, Benjamin Taylor, born 5/8/2014, age 3.5m, male. It includes fields for Name, Preferred Name, Date of Birth, Age, Gender, Medical Conditions, and a photo. On the right, there is a 'Contact People' section with 'Primary Contact' Martha Taylor (Mother) and 'Other Contact' fields. At the bottom, there are tabs for Bookings, Makeup, Waiting List, Achievements, Correspondence, and Comments/Custom. The 'Bookings' tab is active, showing a table for 'Total Enrolments' with columns for Block/Year and a section for 'Reason for Lessons' and 'Exit Reason'.

Finding a Student

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



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

The screenshot shows the 'Search for a Student' dialog box. It has a 'Cancel' button and a 'Find Now' button. The search criteria include: Student ID, Student Name, Address, Family Email, Family Contact Name, Family Telephone, Mobile Telephone, Family Alert, Medical Condition, Status, Gender, Allow Photo, Student Birthday (Date of Birth, Age, Month, Day of Month), Automatically Rollover Booking, Discount Rate, Discount Type, Credits Owing, Payment Authority Held, Comments, First Swim Date, Last Swim Date, Total Family Bookings, Highest Booking Level, Reason for Lessons, Exit Date, and Exit Reason. At the bottom, there are buttons for 'Cancel', 'New Request', 'Omit Records', 'Constrain Set', 'Extend Set', and 'Find Now'.

4. Enter the criteria for your find by typing your request in the corresponding field/s.

5. Click the **Find Now** button.
6. If one record is located the record will be displayed on the Student entry screen. If multiple records are located the found set will be displayed in the list view.

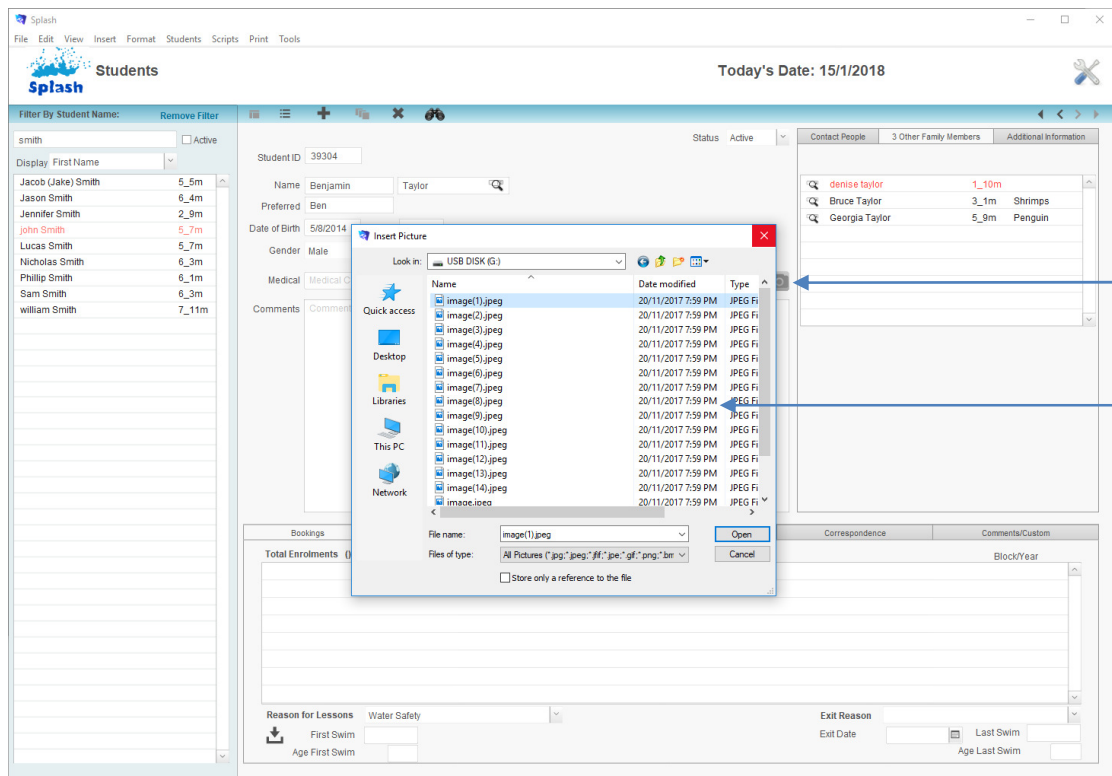
NB: See *Advanced Find Techniques* within this guide for assistance with Constraining or Extending the found set.

Updating Student Details

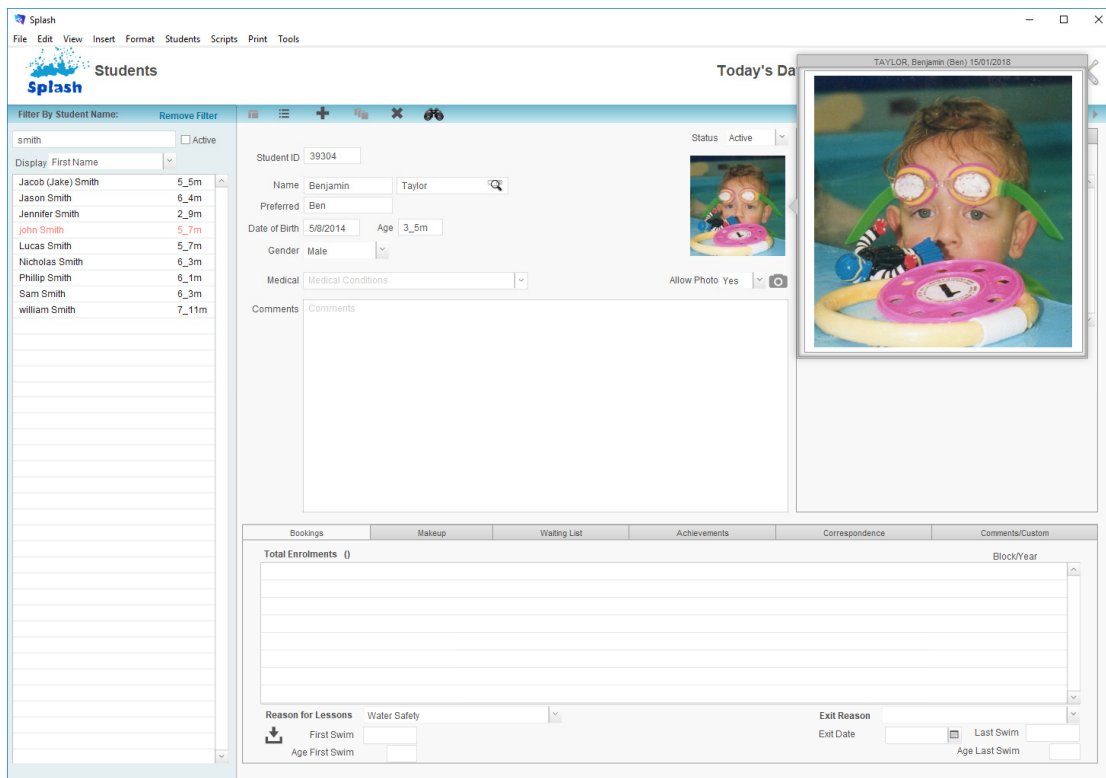
1. Use the **Finding a Student** function to locate the student record you wish to update.
2. When the correct student screen is displayed simply overtype any of the information to update the information that has been stored.

Inserting a Photograph

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



3. Click once inside the large photo field.
4. Select **Picture** from the **Insert** menu.
5. Locate and select the student photograph.
6. Click **Insert** to place the photograph on the student file.



Removing a Student Photograph

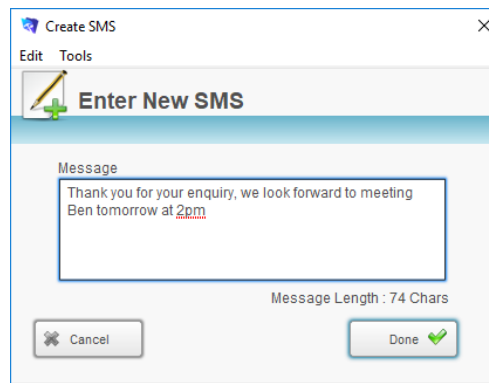
1. Use the **Finding a Student** function to locate the student record you wish to update.
2. When the correct student screen is displayed click once in the Photo field.
3. Click once inside the large photo field.
4. Press the **Delete** key on your keyboard.

Sending a SMS Message

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

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

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



Create SMS

Edit Tools

Enter New SMS

Message

Thank you for your enquiry, we look forward to meeting Ben tomorrow at 2pm

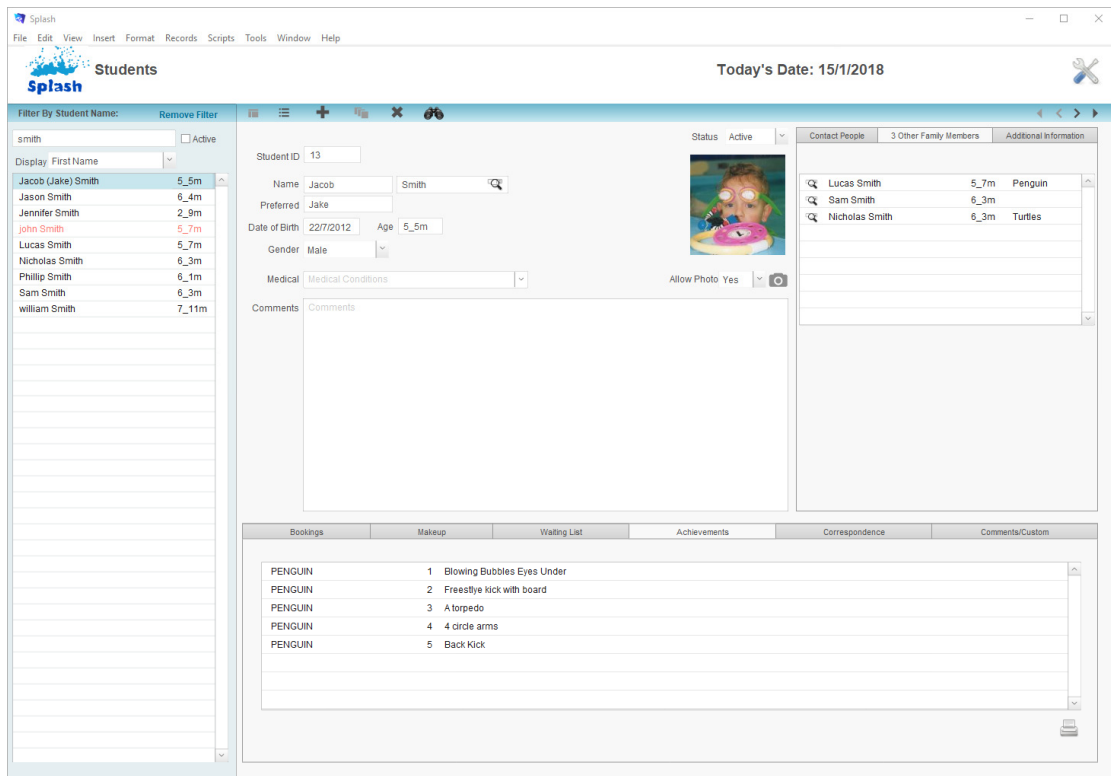
Message Length : 74 Chars

Cancel Done

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

Creating a Record of Achievement

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



Splash Students Today's Date: 15/1/2018

Filter By Student Name: Remove Filter

smith ☐ Active

Display First Name

Jacob (Jake) Smith	5_5m
Jason Smith	6_4m
Jennifer Smith	2_9m
John Smith	5_7m
Lucas Smith	5_7m
Nicholas Smith	6_3m
Phillip Smith	6_1m
Sam Smith	6_3m
William Smith	7_11m

Student ID: 13

Name: Jacob Smith

Preferred: Jake

Date of Birth: 22/7/2012 Age: 5_5m

Gender: Male

Medical: Medical Conditions

Comments: Comments

Allow Photo: Yes


Contact People: 3 Other Family Members

Lucas Smith	5_7m	Penguin
Sam Smith	6_3m	
Nicholas Smith	6_3m	Turtles

Bookings: Makeup: Waiting List: Achievements: Correspondence: Comments/Custom:

PENGUIN	1	Blowing Bubbles Eyes Under
PENGUIN	2	Freestyle kick with board
PENGUIN	3	A torpedo
PENGUIN	4	4 circle arms
PENGUIN	5	Back Kick

3. 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).



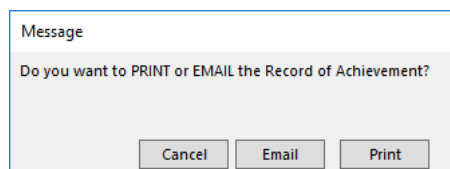
Record of Achievement

Pages: 1 Total

Save as Excel Save as PDF Print Print Setup

Layout: AC_PRT Achievements View As: Exit Preview Script paused **Continue**

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




Message

Do you want to PRINT or EMAIL the Record of Achievement?


Cancel Email Print

- Click **OK** to print the report, **PDF** to save the report as a PDF, 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

2 Freestyle kick with board

3 A torpedo

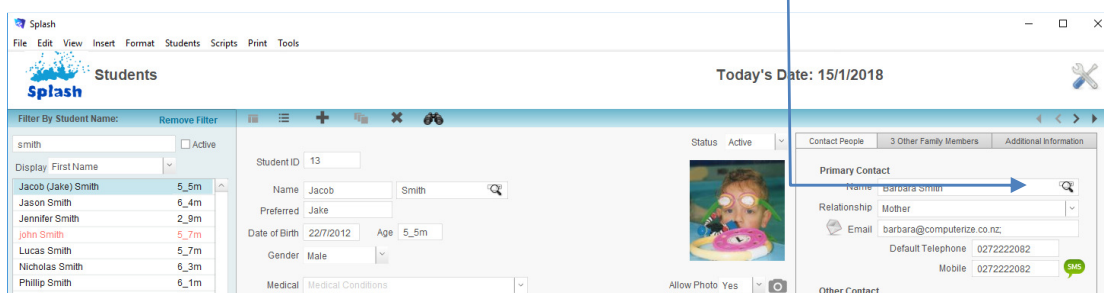
4 4 circle arms

5 Back Kick


Moving a Student from One Family to Another

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

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




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



Select a Family

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

 Filter:

Smith	Unknown	0272222082		
Smith	Barbara	0272222082	6A Erlestoke Crescent, Churton Park,	Jacob, Sam, Nicholas, Lucas
Smith	Daniel	0272222082	89 Roberta Road, Tawa 4008	Jason, Phillip, Jennifer, John
Smith	Bridget	0272222082	1243 Any Street, Wellington	

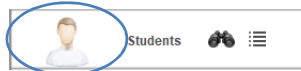
5. The student surname will automatically be copied the filter field and all existing families with a matching surname will be displayed.
6. Simply click family you wish to move the child to.

Deleting a Student Record

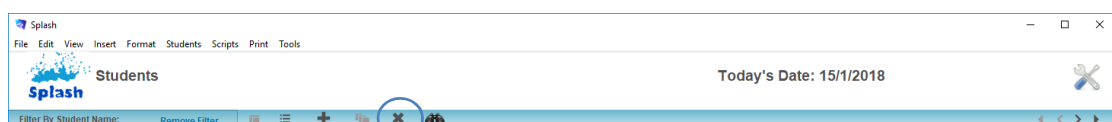
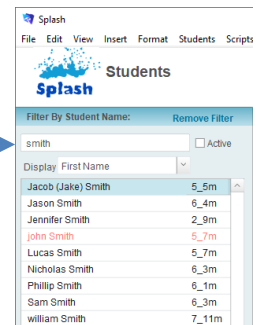
As a rule a record should only be deleted if it was made in error. To ensure data integrity a student record can only be deleted if there are no bookings. Student records can be deleted from either the Student entry screen or the list view.

Deleting a Student

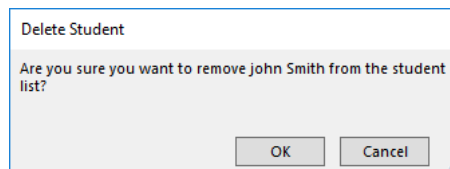
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Student** icon



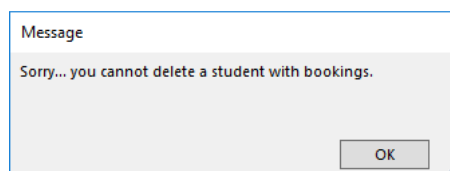
3. The Student data entry screen will be displayed, enter the name of the student you wish to remove in the filter field at the top of the portal list on the left of your screen.
4. Using the portal on the left of the screen, click once on student you wish to delete.
5. The portal row will be highlighted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



7. You will be asked to confirm the selected student is to be deleted.
8. A dialog will be displayed asking you to confirm the student record should be deleted.



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



NB: You cannot delete a student with bookings attached.


Generating Student Documents

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

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

The screenshot shows the 'Students' window in the Splash application. On the left, a list of students is displayed, with 'Jacob (Jake) Smith' selected. The main area shows details for this student, including a photo and various fields for personal and medical information. The 'Correspondence' tab is active, showing a table of correspondence items. The table has columns for Date, Type, Name, and Description. Two items are listed: a letter dated 11/01/18 from Jacob Smith with the description 'Happy Birthday', and a booking dated 11/01/18 from Barbara Smith with the description 'Swim School Multiple Booking Confirmation'.

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

Create Correspondence 

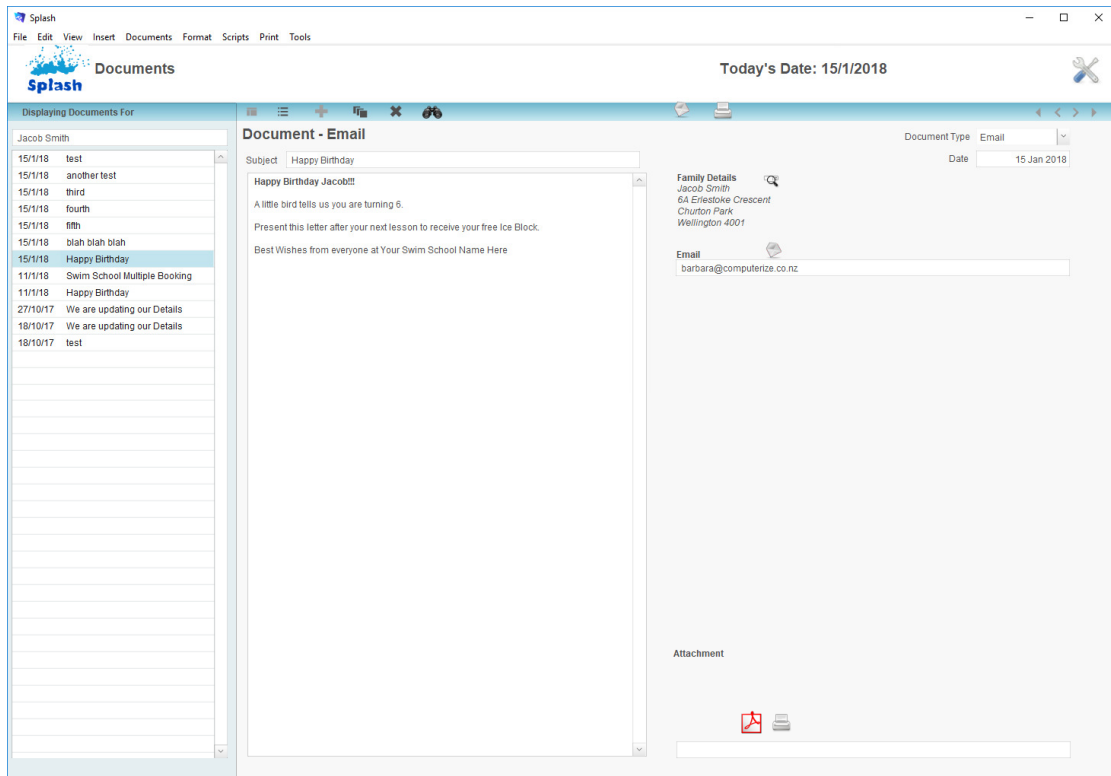
4. Choose the type of document you want to create and click the **Done** button.

The 'Create Document' dialog box is shown. It prompts the user to select the type of document to create. The dropdown menu is set to 'Email'. The 'Done' button is highlighted with a green checkmark.

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

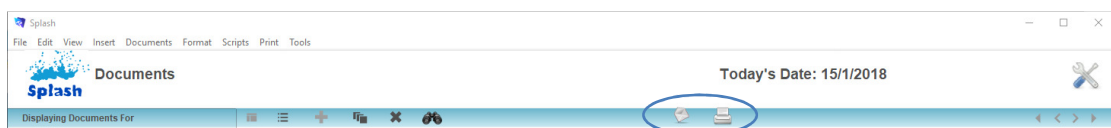
The 'Create Document' dialog box is shown. It prompts the user to select the template to use. The dropdown menu is set to 'Happy Birthday'. The 'Done' button is highlighted with a green checkmark.

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



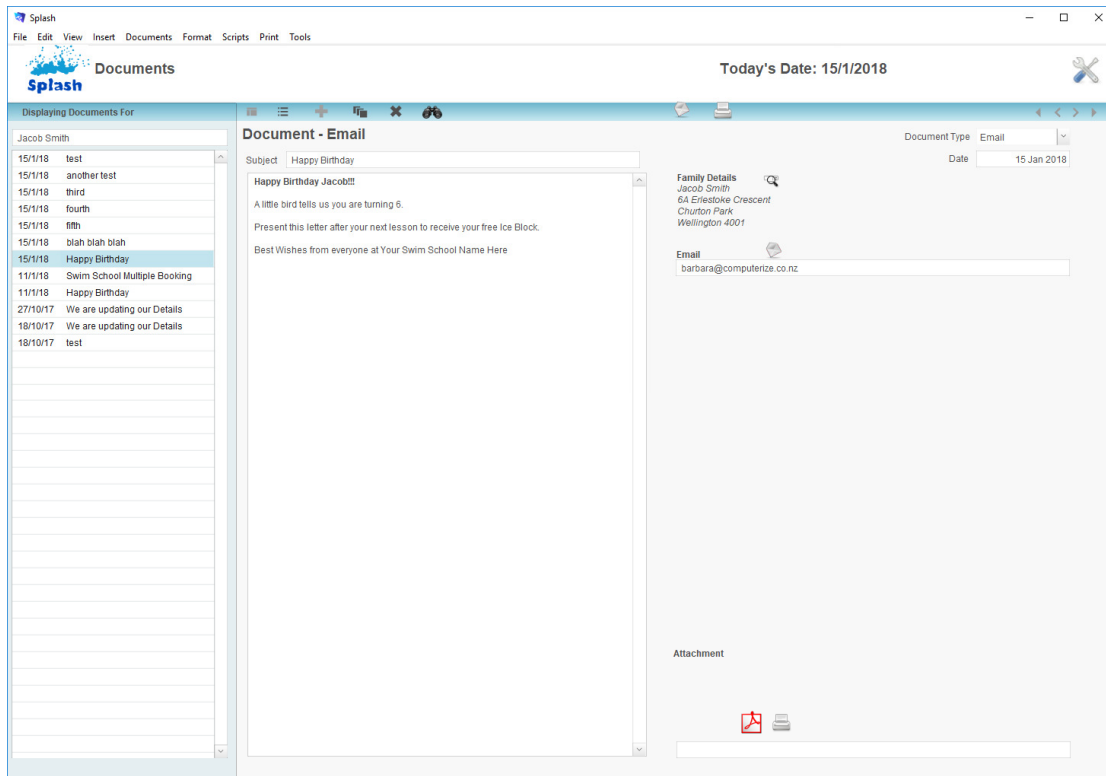
7. Edit the document as necessary.

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



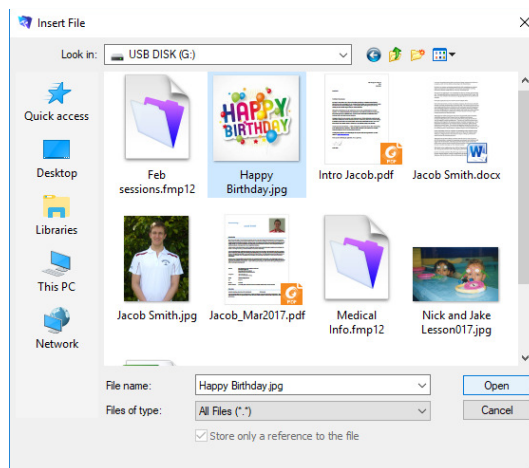
Adding an Attachment to an Email

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

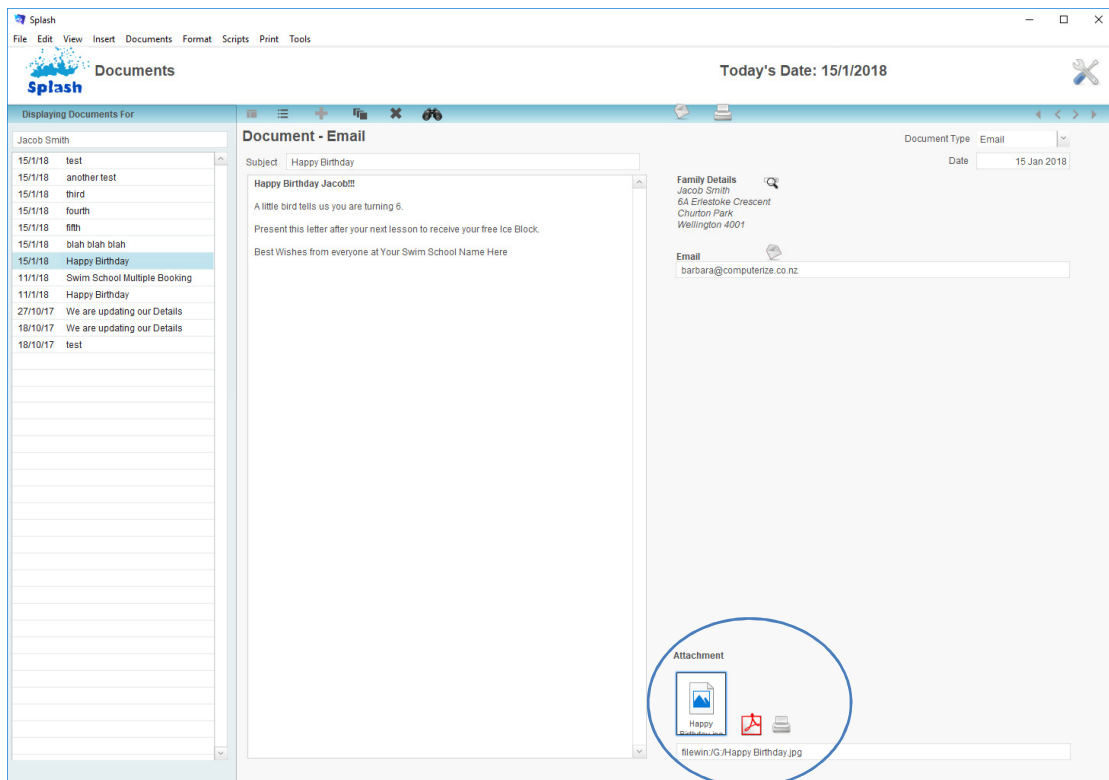


NB: The Attachment field and buttons are only displayed on screen for email documents.

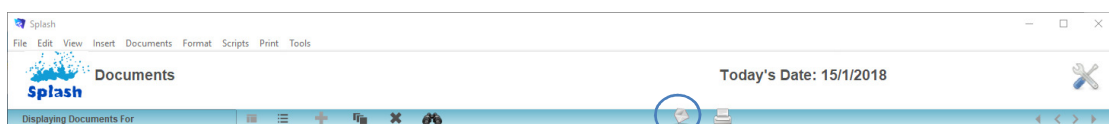
1. Ensure the correct email document is displayed on your screen.
2. Click once on the **Insert PDF** button.
3. The Insert File dialog will be displayed on your screen. Locate the file you wish to attach and click the Insert button.



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



5. Click the **Email** button.



NB: If you want to print the attachment double click the document icon to open it then choose print from the application it is displayed in.

Changing the Status of a Student

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

Changing a Group of Students to Active

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

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



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

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

Changing a Group of Students to Inactive

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

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



3. Select **Set Students without Bookings to Active** from the Scripts menu.
4. The Locate Current Students dialog will be displayed on your screen. Simply enter the start date and end date of the term and click the OK button.
5. Splash will hide all of the students with a booking within the specified dates and set the remaining records to status “Active”.

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

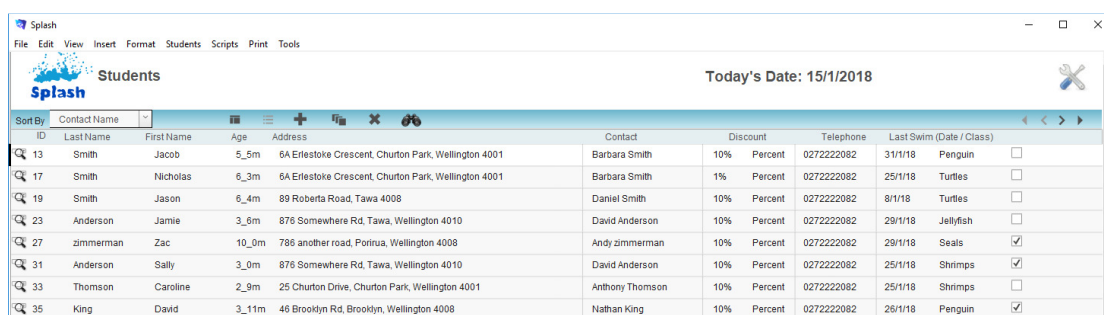
Sending a Broadcast SMS Message

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

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

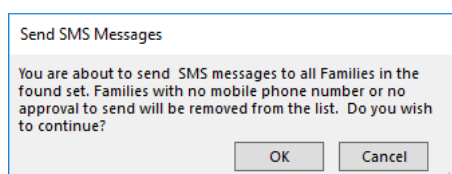
You can only send SMS messages if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

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

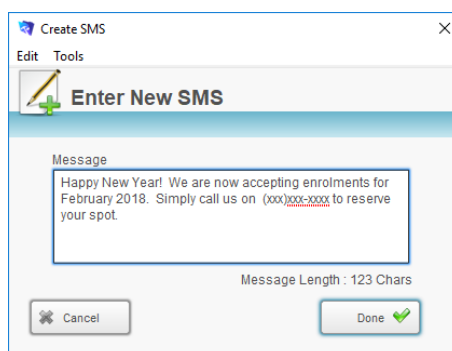


ID	Last Name	First Name	Age	Address	Contact	Discount	Telephone	Last Swim (Date / Class)
13	Smith	Jacob	5_5m	6A Erlestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	10% Percent	0272222082	31/1/18 Penguin <input type="checkbox"/>
17	Smith	Nicholas	6_3m	6A Erlestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	1% Percent	0272222082	25/1/18 Turtles <input type="checkbox"/>
19	Smith	Jason	6_4m	89 Roberts Road, Tawa 4008	Daniel Smith	10% Percent	0272222082	8/1/18 Turtles <input type="checkbox"/>
23	Anderson	Jamie	3_6m	876 Somewhere Rd, Tawa, Wellington 4010	David Anderson	10% Percent	0272222082	29/1/18 Jellyfish <input type="checkbox"/>
27	zimmerman	Zac	10_0m	786 another road, Porirua, Wellington 4008	Andy zimmerman	10% Percent	0272222082	29/1/18 Seals <input checked="" type="checkbox"/>
31	Anderson	Sally	3_0m	876 Somewhere Rd, Tawa, Wellington 4010	David Anderson	10% Percent	0272222082	25/1/18 Shrimps <input checked="" type="checkbox"/>
33	Thomson	Caroline	2_9m	25 Churton Drive, Churton Park, Wellington 4001	Anthony Thomson	10% Percent	0272222082	25/1/18 Shrimps <input type="checkbox"/>
35	King	David	3_11m	46 Brooklyn Rd, Brooklyn, Wellington 4008	Nathan King	10% Percent	0272222082	26/1/18 Penguin <input checked="" type="checkbox"/>

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



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



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

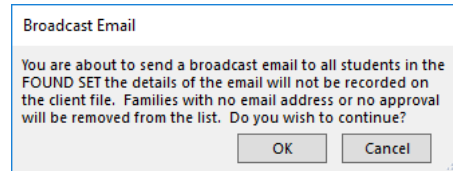
NB: Each SMS message is sent via your default email application.

Sending a Broadcast Email

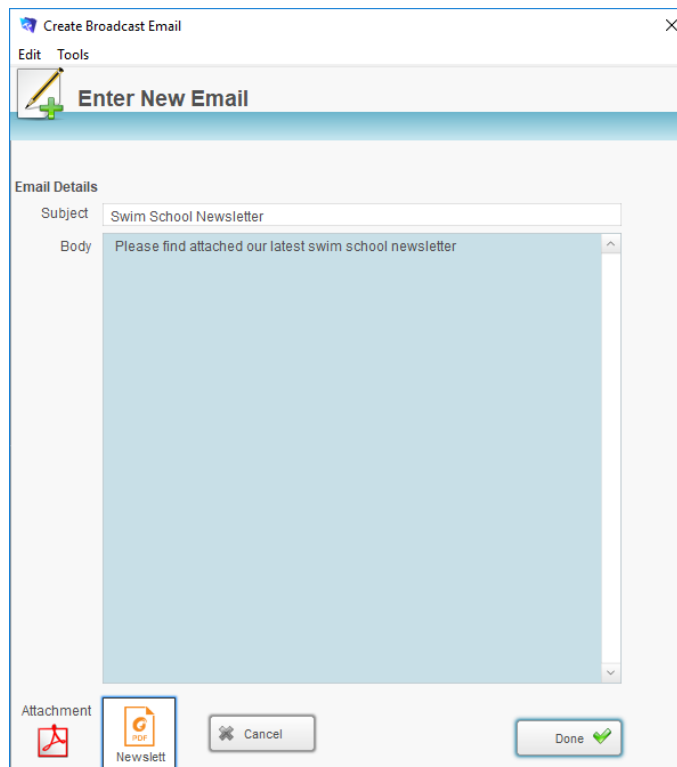
A broadcast email is a single email sent to multiple recipients. An email sent in this way will not be recorded on the family file.

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

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



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

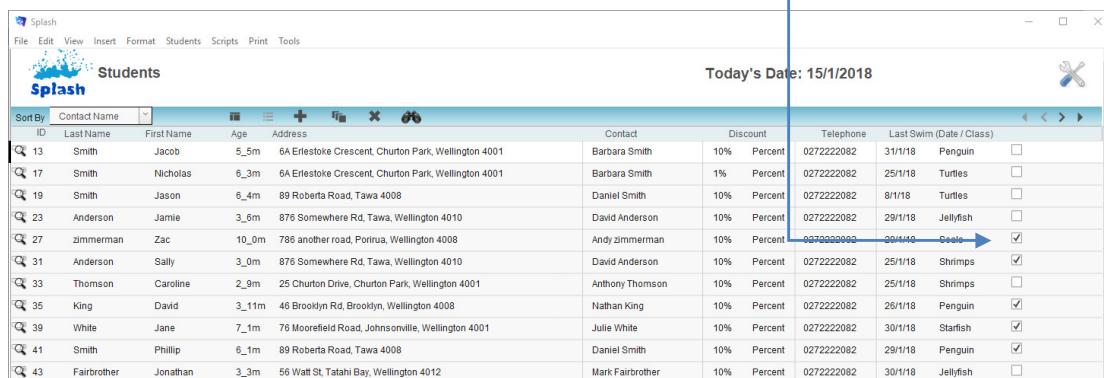


6. Enter the message you wish to send and attach a document if required.
7. Click the **Done** button.

NB: To ensure the privacy of all clients each email address will be placed in the BCC box. You can view the messages that have been sent by looking in the Sent Items folder of your default email application.

Generating a Student Mail Merge

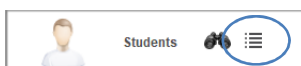
The mail merge function in Splash operates using a marked record system. All marked records will be included in the mail merge. Marked students appear in the Student listing with a tick in the box on the far right of the screen.



ID	Last Name	First Name	Age	Address	Contact	Discount	Telephone	Last Swim (Date / Class)	Marked
13	Smith	Jacob	5_5m	6A Erlestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	10% Percent	0272222082	31/1/18 Penguin	<input type="checkbox"/>
17	Smith	Nicholas	6_3m	6A Erlestoke Crescent, Churton Park, Wellington 4001	Barbara Smith	1% Percent	0272222082	25/1/18 Turtles	<input type="checkbox"/>
19	Smith	Jason	6_4m	89 Roberta Road, Tawa 4008	Daniel Smith	10% Percent	0272222082	8/1/18 Turtles	<input type="checkbox"/>
23	Anderson	Jamie	3_6m	878 Somewhere Rd, Tawa, Wellington 4010	David Anderson	10% Percent	0272222082	29/1/18 Jellyfish	<input type="checkbox"/>
27	zimmerman	Zac	10_0m	786 another road, Porirua, Wellington 4008	Andy zimmerman	10% Percent	0272222082	29/1/18 Penguins	<input checked="" type="checkbox"/>
31	Anderson	Sally	3_0m	878 Somewhere Rd, Tawa, Wellington 4010	David Anderson	10% Percent	0272222082	25/1/18 Shrimps	<input checked="" type="checkbox"/>
33	Thomson	Caroline	2_9m	25 Churton Drive, Churton Park, Wellington 4001	Anthony Thomson	10% Percent	0272222082	25/1/18 Shrimps	<input type="checkbox"/>
35	King	David	3_11m	46 Brooklyn Rd, Brooklyn, Wellington 4008	Nathan King	10% Percent	0272222082	26/1/18 Penguin	<input checked="" type="checkbox"/>
39	White	Jane	7_1m	76 Moorefield Road, Johnsonville, Wellington 4001	Julie White	10% Percent	0272222082	30/1/18 Starfish	<input checked="" type="checkbox"/>
41	Smith	Phillip	6_1m	89 Roberta Road, Tawa 4008	Daniel Smith	10% Percent	0272222082	29/1/18 Penguin	<input checked="" type="checkbox"/>
43	Fairbrother	Jonathan	3_3m	56 Watt St, Tātahi Bay, Wellington 4012	Mark Fairbrother	10% Percent	0272222082	30/1/18 Jellyfish	<input type="checkbox"/>

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

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

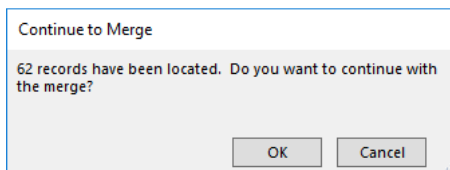


3. The Student List View screen will be displayed.
4. Click once on the **Find Marked** button displayed at the bottom right of the screen. This command will display a list of all students that are currently marked.
5. Click once on the **Unmarked Found Set** button. This will clear all settings for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

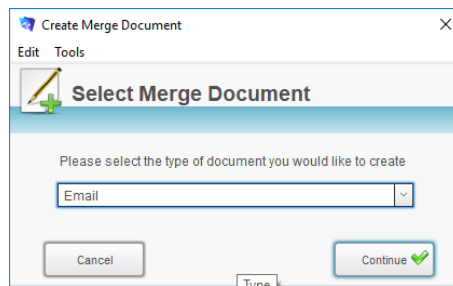


Displaying found set (62 out of 98)	Find Marked	Unmark Found Set	Mark Found Set
-------------------------------------	-------------	------------------	----------------

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



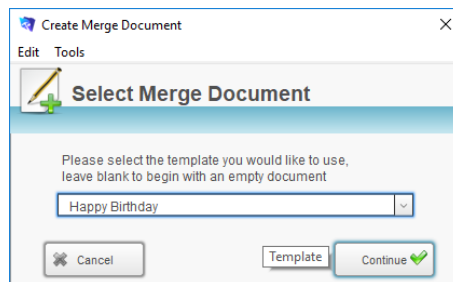
12. The **Create Merge Document** dialog will be displayed asking you to define the type of document you wish to create. Select the required type of document from the drop-down menu provided.



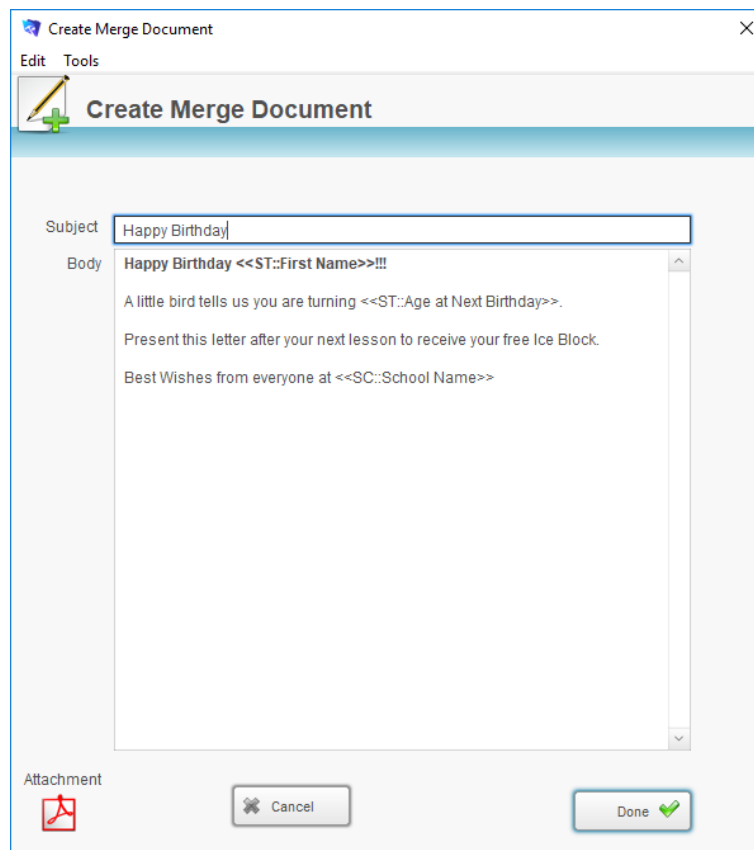
13. Click the **Continue** button.

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

15. Click the **Continue** button.



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



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

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

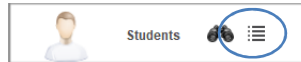
Importing Student Data

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

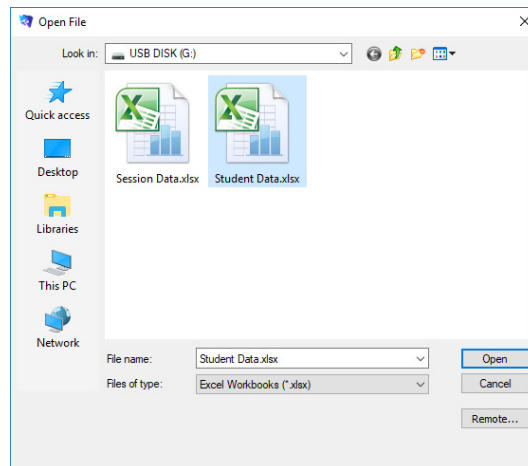
- add new records from the source file
- update records with information from the source file
- update matching records with information from the source file

Importing Records from Excel

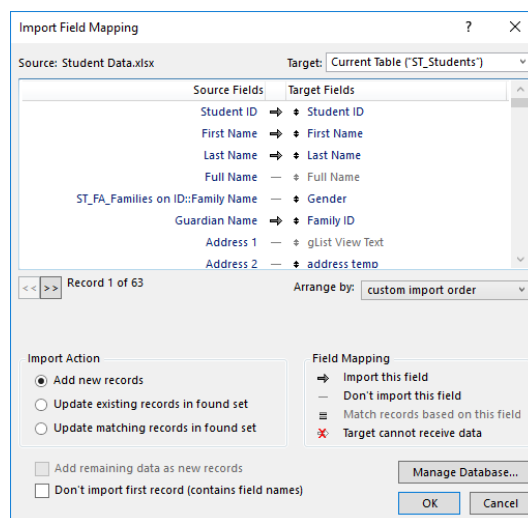
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Students List** icon



3. The Student List View screen will be displayed.
4. Select **Import Student Data** from the **Scripts** menu.
5. The **Open File** dialog will be displayed on your screen.
6. Locate the file containing the data you wish to import and click the **Open** button.



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





8. In the **Import Action** area, choose the type of import to perform.
To add new records to the end of the target file – select **Add New Records**
To update the found set of records in the target file with the records you're importing – select **Update existing records in found set**.

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

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

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

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

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

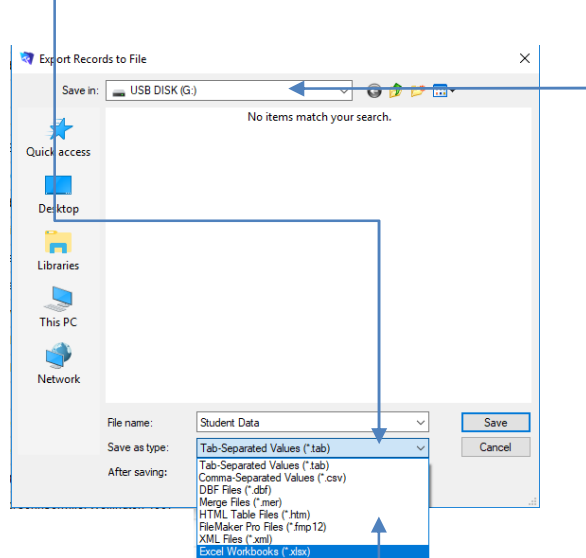
11. When all fields have been aligned correctly, click the **Import** button.

Exporting Student Data

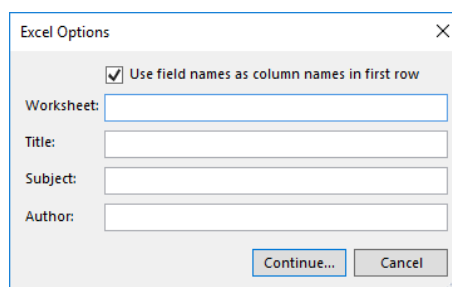
You can export Splash data to a new file and then open it in another application. For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

Exporting Records to Excel

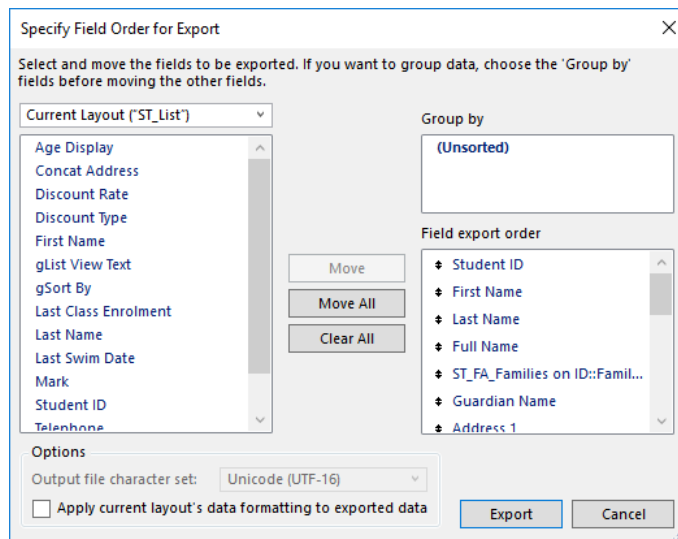
1. Use the **Finding a Student** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Student Data** from the **Scripts** menu.
4. The **Export Records to File**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



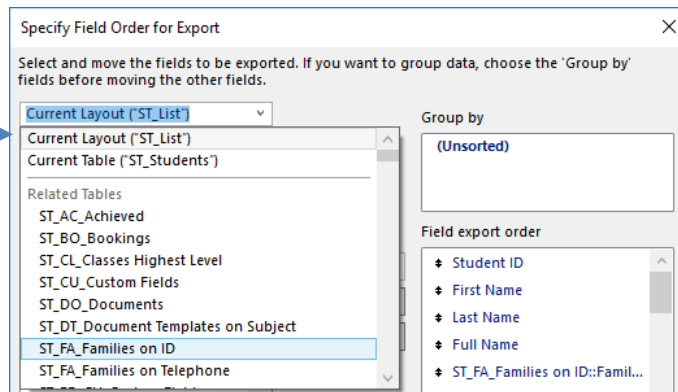
6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



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



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



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

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

Student Data.xlsx - Microsoft Excel non-commercial use										
	A	B	C	D	E	F	G	H	I	J
	Student ID	First Name	Last Name	Full Name	FA_Families on ID::Family No	Guardian Name	Address 1	Address 2	Address 3	Ac
1	13	Jacob	Smith	Jacob (Jake) Smith	Smith	Barbara Smith	6A Erlestoke Crescent		Churton Park	Wellington
2	17	Nicholas	Smith	Nicholas Smith	Smith	Barbara Smith	6A Erlestoke Crescent		Churton Park	Wellington
3	19	Jason	Smith	Jason Smith	Smith	Daniel Smith	89 Roberta Road	Tawa		Wellington
4	23	Jamie	Anderson	Jamie Anderson	Anderson	David Anderson	876 Somewhere Rd	Tawa		Wellington
5	27	Zac	zimmerman	Zac zimmerman	zimmerman	Andy zimmerman	786 another road	Porirua		Wellington
6	31	Sally	Anderson	Sally Anderson	Anderson	David Anderson	876 Somewhere Rd	Tawa		Wellington
7	33	Caroline	Thomson	Caroline Thomson	Thomson	Anthony Thomson	25 Churton Drive	Churton Park		Wellington
8	35	David	King	David King	King	Nathan King	46 Brooklyn Rd	Brooklyn		Wellington
9	39	Jane	White	Jane White	White	Julie White	76 Moorefield Road	Johnsonville		Wellington
10	41	Phillip	Smith	Phillip Smith	Smith	Daniel Smith	89 Roberta Road	Tawa		Wellington
11	43	Jonathan	Fairbrother	Jonathan Fairbrother	Fairbrother	Mark Fairbrother	56 Watt St	Tatahi Bay		Wellington
12	45	Stephanie	Hughson	Stephanie Hughson	Hughson	Ngairie Hughson	98 Barrett St	Ngalo		Wellington

Printing Student Reports

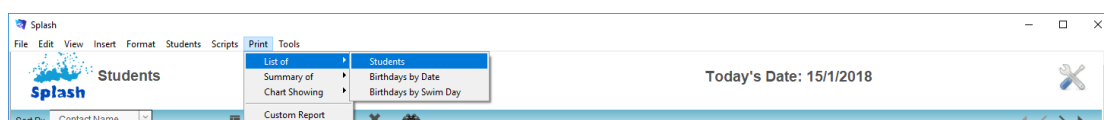
You must be in the Student module of Splash to generate the following reports: All reports are displayed in the Print menu.

Printing a List of Students

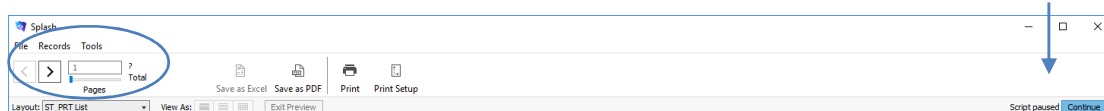
This report provides a listing of student ID, address and contact details, it should be printed and kept as a reference guide and backup of your system.

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

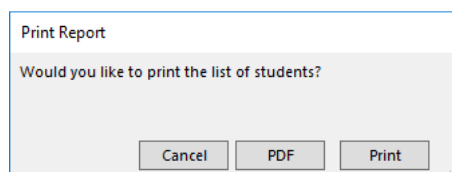
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Students** from the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



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



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



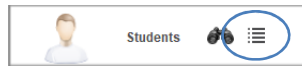
6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

List of Students			Last Swim	Last Class	Total Number of Bookings
Amanda Brown	345 Nowhere St, Brooklyn, Wellington 4009	0272222082	28/1/18	Penguin	1
Anthony Apollo	78 Youngs Road, Tauranga 7902	0272222082	25/1/18	Turtles	8
Barry Robinson	46 Hillcrest Road, Johnsonville, Wellington 4007	0272222082	31/1/18	Penguin	1
Benjamin Nightingale	15 Albert St, Redwood, Wellington 4010	0272222082	31/1/18	Penguin	1
Benjamin Williams	171 Chapel St, Khandallah, Wellington 4005	0272222082	25/1/18	Turtles	8
Billy Jones	123 Any St, Wellington	0272222082	29/1/18	Turtles	12
Bobby Thomson	25 Churton Drive, Churton Park, Wellington 4001	0272222082	28/1/18	Starfish	1
brenda thomas	123 any st	0272222082	28/1/18	Penguin	1
Bridgette Robinson	46 Hillcrest Road, Johnsonville, Wellington 4007	0272222082	28/1/18	Seals	1
Bruce Taylor	79 Main St, Tawa, Wellington 4010	0272222082	25/1/18	Shrimps	8
Caroline Thomson	25 Churton Drive, Churton Park, Wellington 4001	0272222082	25/1/18	Shrimps	8
Corey Morrison	8 Victoria St, Redwood, Wellington 4010	0272222082	29/1/18	Jellyfish	1
Craig King	46 Brooklyn Rd, Brooklyn, Wellington 4008	0272222082	25/1/18	Seals	8
David King	46 Brooklyn Rd, Brooklyn, Wellington 4008	0272222082	28/1/18	Penguin	8

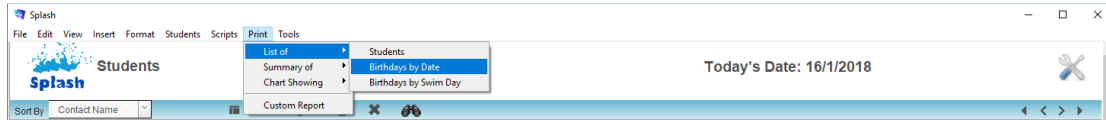
Printing a Birthday List by Date

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

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



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



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

Locate Birthdays

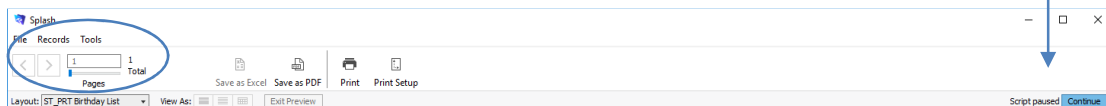
Please enter the date range you wish to locate.

Month Name

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

Age (enter < to specify a range)

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



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

Print Report

Would you like to print the list of student birthdays?

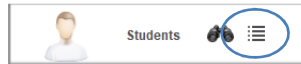
9. Click OK to print the report or Cancel to return to your original screen without printing.

List of Student Birthdays				
May				
1 st	Anthony Beauchamp	is turning	8	Mon @ 5:15 PM Seals
1 st	Billy Jones	is turning	6	Mon @ 4:00 PM Turtles
1 st	Paul Fairbrother	is turning	9	Thu @ 3:45 PM Seals
7 th	Robert Harper	is turning	6	Thu @ 10:00 AM Turtles
22 nd	Melanie McArthur	is turning	3	Wed @ 3:30 PM Penguin

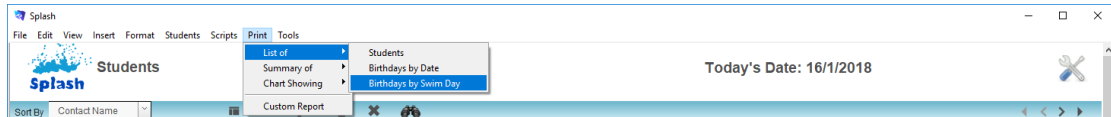
Printing a Birthday List by Swim Day

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

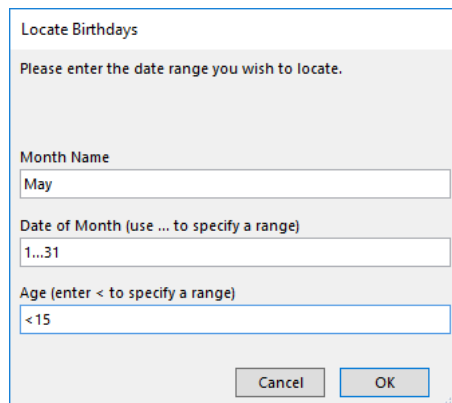
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Students List** icon



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



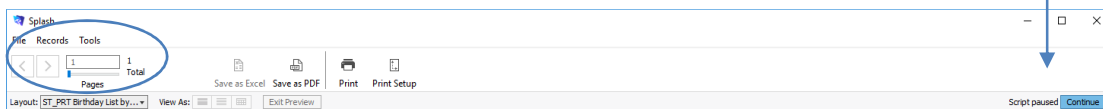
5. The Locate Birthdays dialog will be displayed on your screen. Enter the Month Name, Date (days) of the month, and age criteria for who should be included in the report..

A screenshot of the 'Locate Birthdays' dialog box. It contains the following fields and controls:

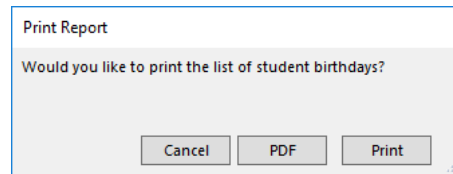
- Text: 'Please enter the date range you wish to locate.'
- Text field: 'Month Name' with the value 'May'.
- Text field: 'Date of Month (use ... to specify a range)' with the value '1...31'.
- Text field: 'Age (enter < to specify a range)' with the value '<15'.
- Buttons: 'Cancel' and 'OK'.

6. Click OK to locate the swimmers with birthdays and preview the report.

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



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



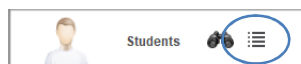
- Click OK to print the report or Cancel to return to your original screen without printing.

List of Student Birthdays				
May				
Swims on Monday				
1 st	Billy Jones	is turning	6	4:00 PM Turtles with BR
1 st	Anthony Beauchamp	is turning	8	5:15 PM Seals with TBA
Swims on Wednesday				
22 nd	Melanie McArthur	is turning	3	3:30 PM Penguin with LW
Swims on Thursday				
7 th	Robert Harper	is turning	6	10:00 AM Turtles with DS
1 st	Paul Fairbrother	is turning	9	3:45 PM Seals with TBA

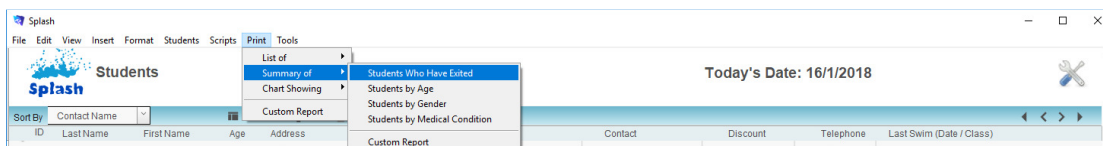
Printing a Summary of Students Who Have Exited

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

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



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



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

Specify Dates for Reporting

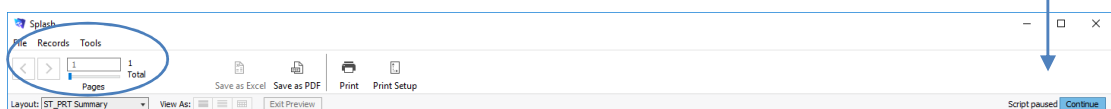
Please specify the start and end date for the reporting period.

Start Date
1/12/17

End Date
31/12/17

Cancel OK

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



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

Print Report

Would you like to print the Summary of Exits?

Cancel PDF OK

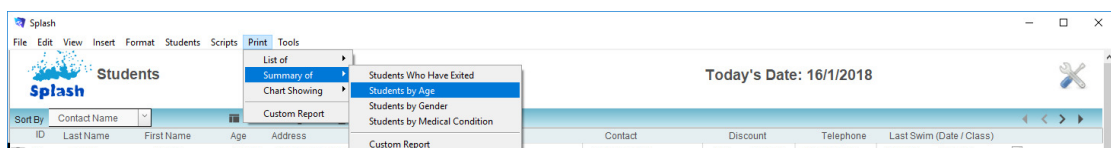
- Click OK to print the report or Cancel to return to your original screen without printing.

Summary of Students		
Summary of Exits		
	Number of Students	Number of Bookings
Friday	1	6
Penguin	1	6
Monday	1	1
Seals	1	1
Total Reported	2	7

Printing a Summary of Students by Age

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

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



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

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

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

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

Summary of Students		
Summary by Age		
	Number of Students	Number of Bookings
2 Years	12	58
3 Years	14	49
4 Years	7	28
5 Years	12	102
6 Years	6	41
7 Years	4	32
8 Years	5	40
9 Years	1	8
Total Reported	61	358

NB: To include a list of student names, click Show Detail at Step 2.

Step 2: Choose/Update Report Summary Groups

Group 1 Summarize by Age

Group 2

Group 3

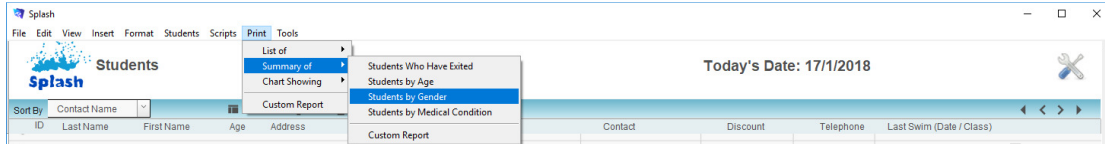
Show Detail ☐

Summary of Students			
Summary by Age			
		Number of Students	Number of Bookings
2 Years		12	1
Benjamin Nightingale	15 Albert St, Redwood, Wellington 4010	0272222082	1
brenda thomas	123 any st	0272222082	1
Caroline Thomson	25 Churton Drive, Churton Park, Wellington 4001	0272222082	8
james gill			1
Jennifer Smith	89 Roberta Road, Tawa 4008	0272222082	8
Jessica Sinclair	3 Main St, Tawa, Wellington 4010	0272222082	8
Joanne Jones	123 Any St, Wellington	0272222082	12
Melanie McArthur	39 River Road, Kelson, Wellington 4008	04 566 7894	1
Nathan Soloman	67 Watkins Rd, Churton Park, Wellington 4001	0272222082	1
Peter Apollo	78 Youngs Road, Tauranga 7902	0272222082	8
sam jones	123 Any St, Wellington	0272222082	1
stuart pearson	456 Any St, Wellington 4000	0272222082	8

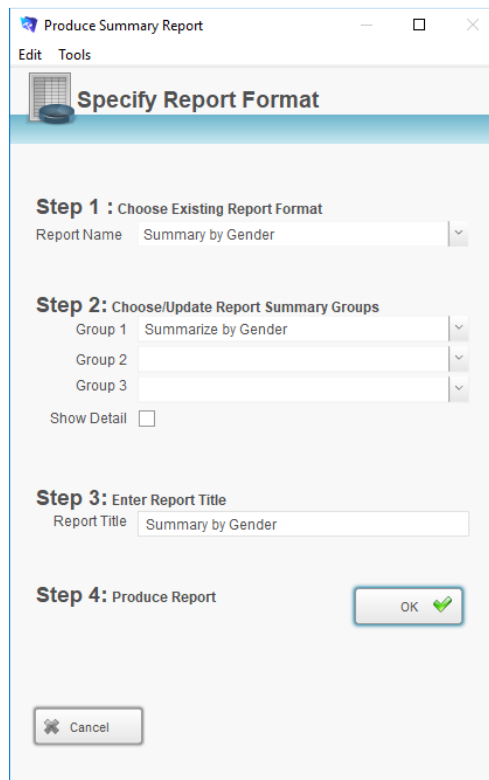
Printing a Summary of Students by Gender

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

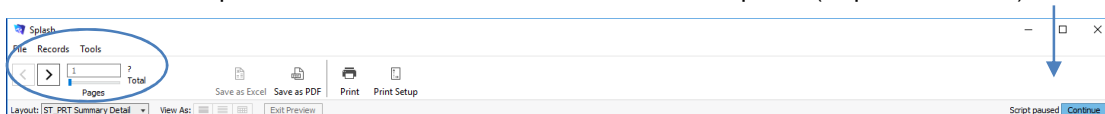
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Students by Gender**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



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



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



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

Print Report

Would you like to print the selected report?

Cancel
PDF
Print

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

Summary of Students		
Summary by Gender		
	Number of Students	Number of Bookings
Female	15	95
Male	30	166
Total Reported	45	261

NB: To include a list of student names, click Show Detail at Step 2.

Step 2: Choose/Update Report Summary Groups

Group 1 Summarize by Gender
Group 2
Group 3

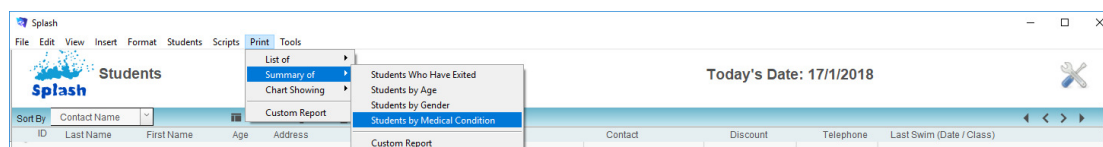
Show Detail ☒

Summary of Students		
Summary by Gender		
	Number of Students	Number of Bookings
Female	15	1
Bridgette Robinson	46 Hillcrest Road, Johnsonville, Wellington 4007	0272222082 1
Caroline Thomson	25 Churton Drive, Churton Park, Wellington 4001	0272222082 8
Georgia Taylor	79 Main St, Tawa, Wellington 4010	0272222082 20
Jamie Anderson	876 Somewhere Rd, Tawa, Wellington 4010	0272222082 1
Jane White	76 Moorefield Road, Johnsonville, Wellington	0272222082 8
Jennifer Smith	89 Roberta Road, Tawa 4008	0272222082 8
Jessica Hargreaves	24 lane St, Wallaceville, Upper Hutt 5014	0272222082 1
Jessica Sinclair	3 Main St, Tawa, Wellington 4010	0272222082 8
Joanne Jones	123 Any St, Wellington	0272222082 12

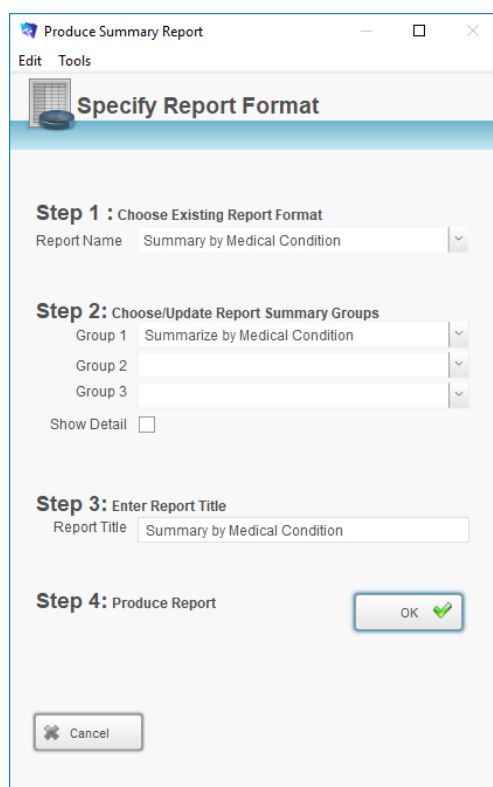
Printing a Summary of Students by Medical Condition

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

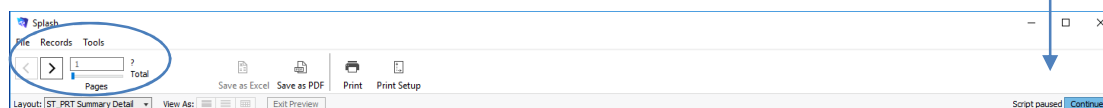
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report. Place an asterisk (*) in the medical condition field if you are looking for everyone with a medical condition.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Students by Medical Condition** from the pop-out menu displayed.



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



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



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

Print Report

Would you like to print the selected report?

Cancel
PDF
Print

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

Summary of Students		
Summary by Medical Condition		
	Number of Students	Number of Bookings
ADHD	1	1
Asthma	6	47
disorder	1	1
Glasses	1	8
Impaired Hearing	1	8
Wears Glasses	1	8
Total Reported	11	73

NB: To include a list of student names, click Show Detail at Step 2.

Step 2: Choose/Update Report Summary Groups

Group 1 Summarize by Medical Condition
Group 2
Group 3

Show Detail ☒

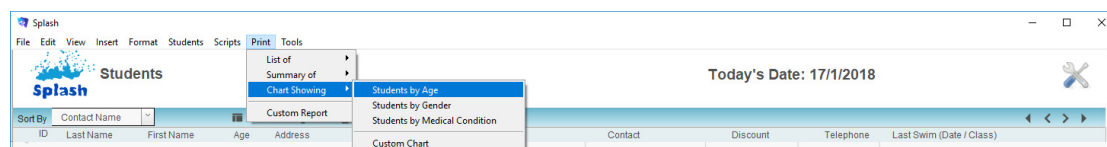
Summary of Students			
Summary by Medical Condition			
		Number of Students	Number of Bookings
ADHD		1	1
	Jamie Anderson 876 Somewhere Rd, Tawa, Wellington 4010	0272222082	1
Asthma		6	20
	Georgia Taylor 79 Main St, Tawa, Wellington 4010	0272222082	20
	Jason Smith 89 Roberta Road, Tawa 4008	0272222082	1
	Jonathan Fairbrother 56 Watt St, Tatahi Bay, Wellington 4012	0272222082	1
	Paul Fairbrother 56 Watt St, Tatahi Bay, Wellington 4012	0272222082	8
	Paula Schwass 123 Any St, Wellington 6440	0272222082	9
	william Smith 123 Any St, Wellington	0272222082	8

Printing Student Charts

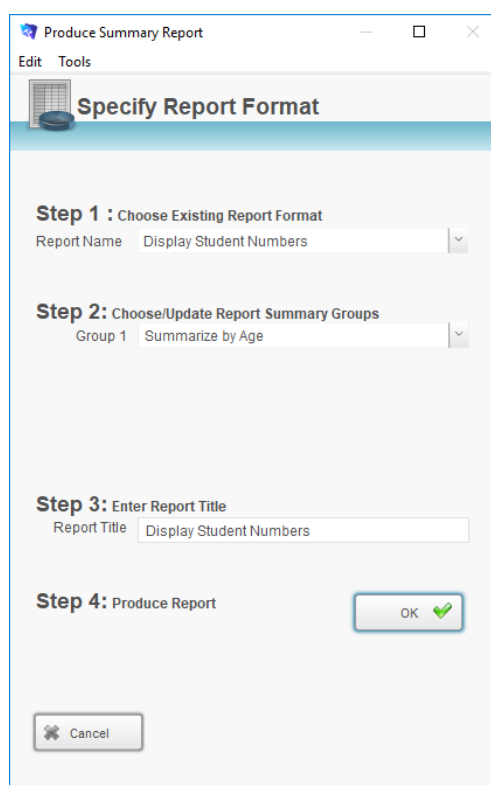
Printing a Chart Showing Students by Age

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

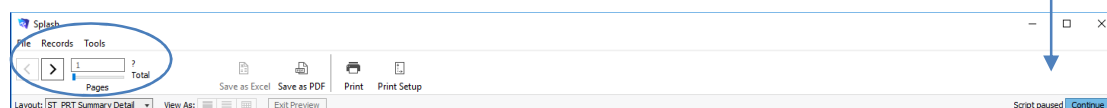
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Students by Age**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



4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Display Student Numbers
Step 2 = Group 1 set to Summarize by Age
Step 3 = Report Name set to Display Student Numbers
6. Amend the grouping options at step 2 or change the report title.
7. Click the OK button.



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



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

Print Report

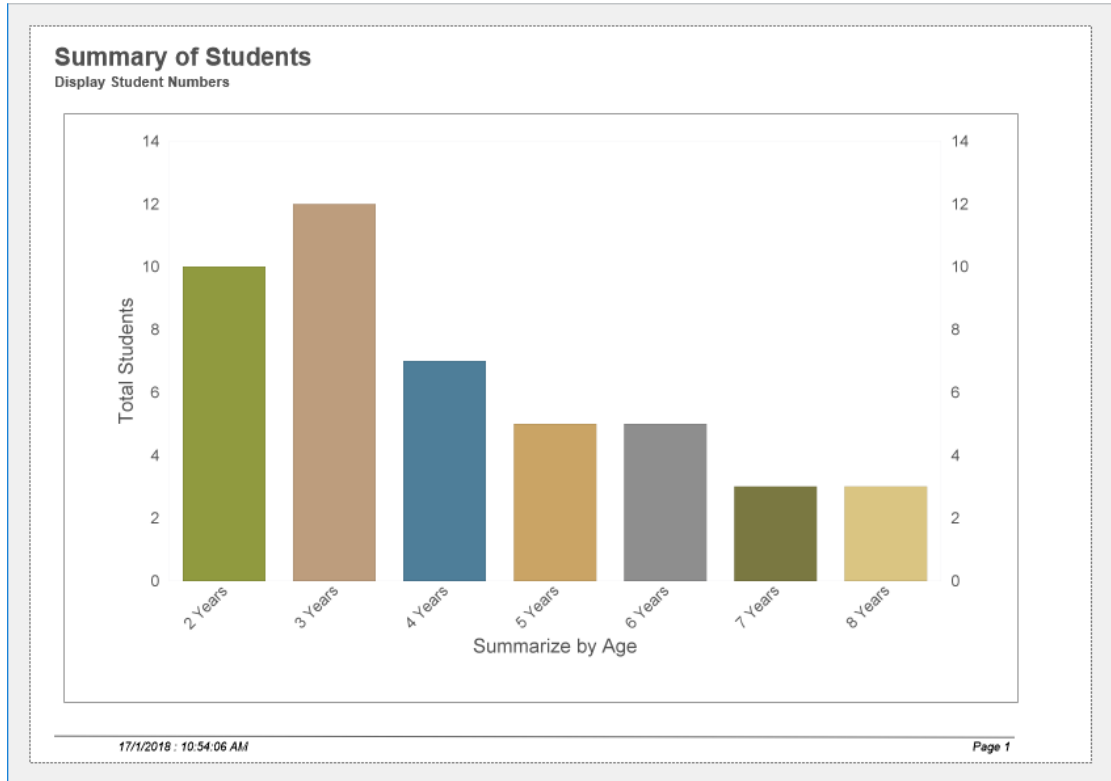
Would you like to print the selected report?

Cancel

PDF

Print

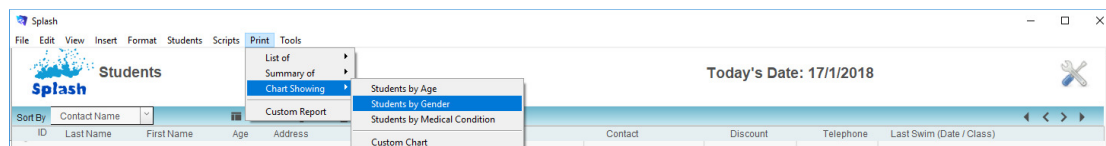
10. Click OK to print the report or Cancel to return to your original screen without printing.



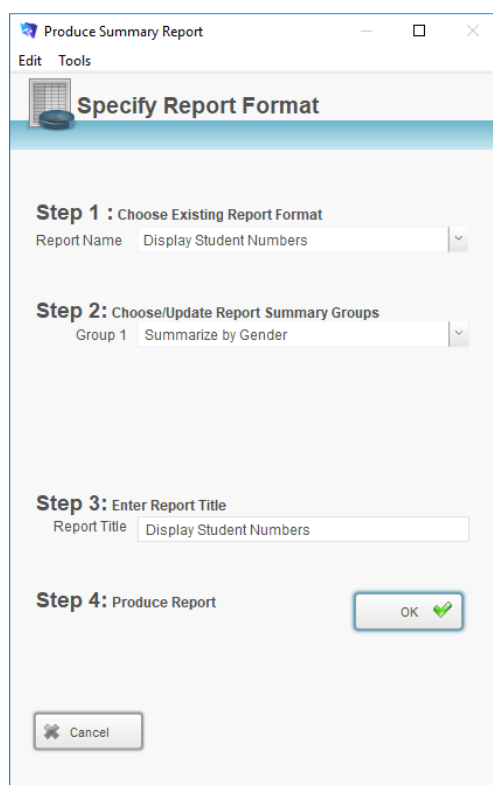
Printing a Chart Showing Students by Gender

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

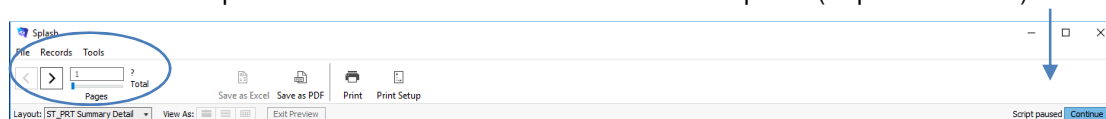
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Students by Gender**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



4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Display Student Numbers
Step 2 = Group 1 set to Summarize by Gender
Step 3 = Report Name set to Display Student Numbers
6. Amend the grouping options at step 2 or change the report title.
7. Click the OK button.



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



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

Print Report

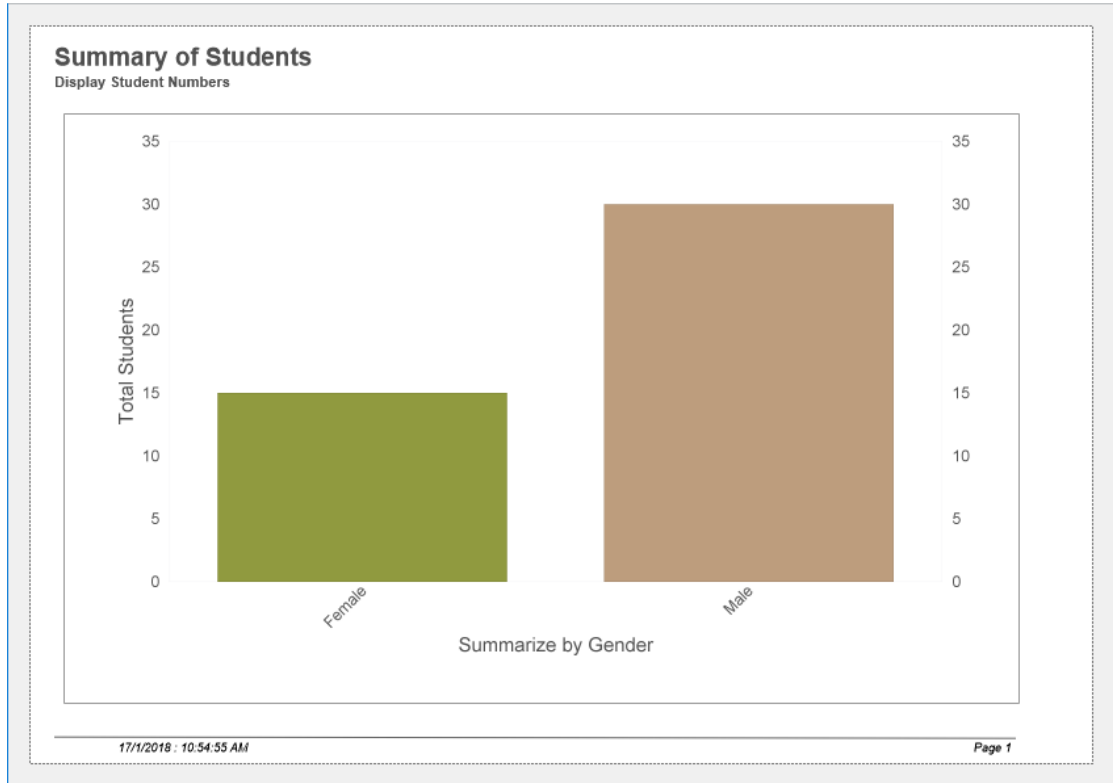
Would you like to print the selected report?

Cancel

PDF

Print

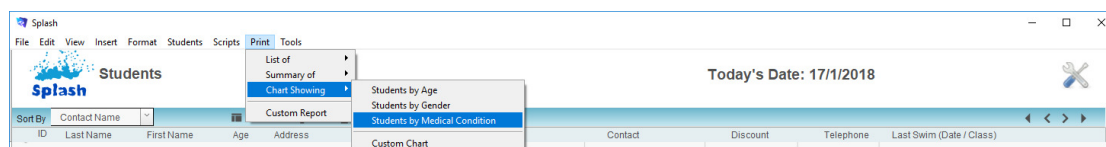
10. Click OK to print the report or Cancel to return to your original screen without printing.



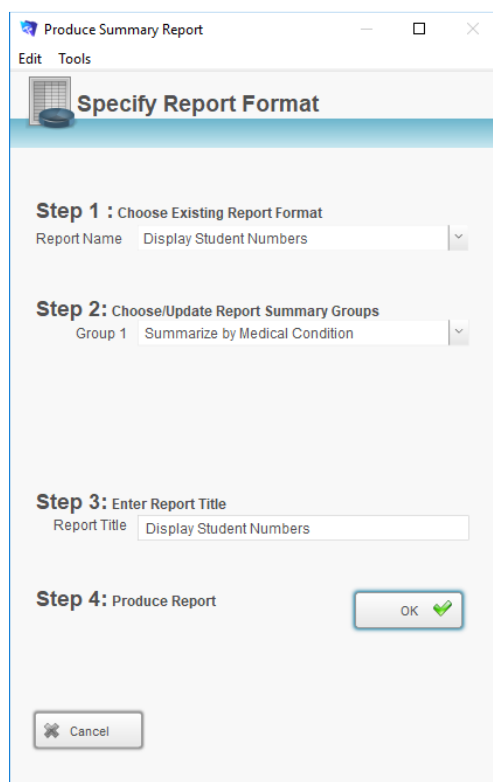
Printing a Chart Showing Students by Medical Condition

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

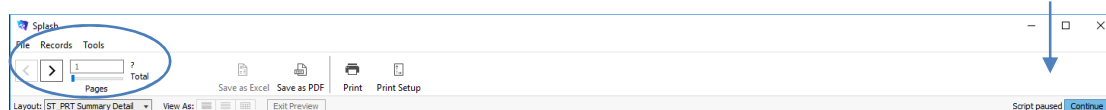
1. Use the **Finding a Student** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1). Please an asterisk (*) in the medical condition field if you want to locate all students with a medical condition.
3. Select **Chart Showing ...** from the Print menu and select **Students by Gender** from the pop-out menu displayed.



4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Display Student Numbers
Step 2 = Group 1 set to Summarize by Gender
Step 3 = Report Name set to Display Student Numbers
6. Amend the grouping options at step 2 or change the report title.
7. Click the OK button.



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



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

Print Report

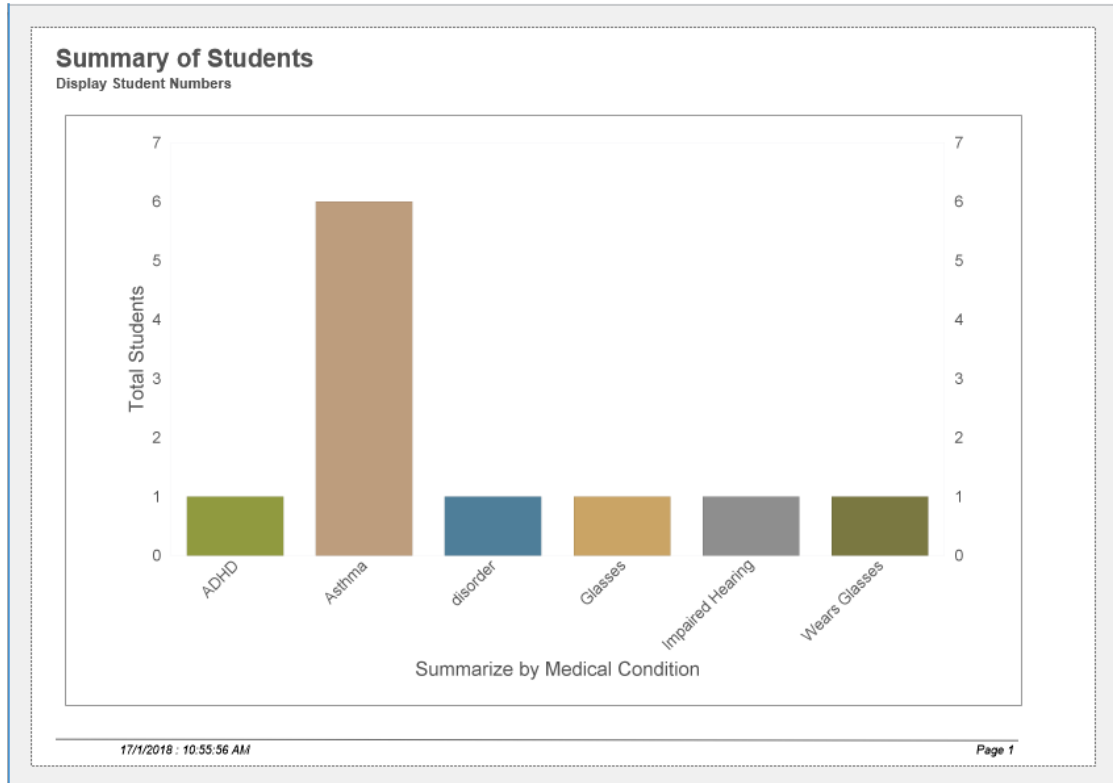
Would you like to print the selected report?

Cancel

PDF

Print

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

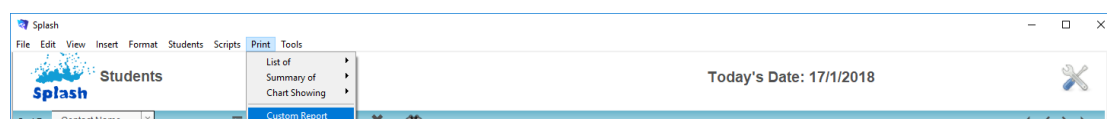


Printing a Custom Report

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

Displaying the Custom Report Dialog

1. Use the **Finding a Student** function to locate the group of students you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. 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. It has a title bar with a close button. Inside, there's a menu bar with 'Edit' and 'Tools'. The main area is titled 'Specify Report Format'. It contains four steps: Step 1: Choose Existing Report Format, with a dropdown menu showing 'Summary by Gender and Age'; Step 2: Choose/Update Report Summary Groups, with three dropdown menus for Group 1 (Summarize by Gender), Group 2 (Summarize by Age), and Group 3; a 'Show Detail' checkbox; Step 3: Enter Report Title, with a text field containing 'Summary by Gender and Age'; and Step 4: Produce Report, with an 'OK' button and a 'Cancel' button at the bottom left.

Defining a Custom Report

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

5. Choose the Report Type
6. Choose the Reporting Groups.
7. Give your report a title.

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

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

Step 2: Choose/Update Report Summary Groups

Group 1 Summarize by Gender

Group 2 Summarize by Age

Group 3

Show Detail ☒

Custom Report Sample (No Detail)

The sample report below demonstrates the use of summary levels. Show Detail was left blank when the report was created.

Summary of Students		
Summary by Gender and Age		
	Number of Students	Number of Bookings
Female	15	95
2 Years	5	37
3 Years	5	19
4 Years	1	1
5 Years	3	30
7 Years	1	8
Male	30	166
2 Years	5	19
3 Years	7	28
4 Years	6	27
5 Years	2	19
6 Years	5	33

Custom Report Sample (Show Detail)

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

Summary of Students		
Summary by Gender and Age		
	Number of Students	Number of Bookings
Female	15	8
2 Years	5	8
Caroline Thomson	25 Churton Drive, Churton Park, Wellington 4001	0272222082
Jennifer Smith	89 Roberta Road, Tawa 4008	0272222082
Jessica Sinclair	3 Main St, Tawa, Wellington 4010	0272222082
Joanne Jones	123 Any St, Wellington	0272222082
Melanie McArthur	39 River Road, Kelson, Wellington 4008	04 566 7894
3 Years	5	1
Jamie Anderson	876 Somewhere Rd, Tawa, Wellington 4010	0272222082
Sally Anderson	876 Somewhere Rd, Tawa, Wellington 4010	0272222082
Sarah Nightingale	15 Albert St, Redwood, Wellington 4010	0272222082
Stephanie Hughson	98 Barrett St, Ngaio, Wellington 4007	0272222082
Tracey O'Donnell	87 Alfredton Rd, Kelburn, Wellington 4002	0272222082

Defining Family Details

One record should exist in this module for every family attending the swim school. It includes a link to any children from the same household. Use this module to monitor family accounts and generate any family correspondence.

Displaying the Family Home Screen

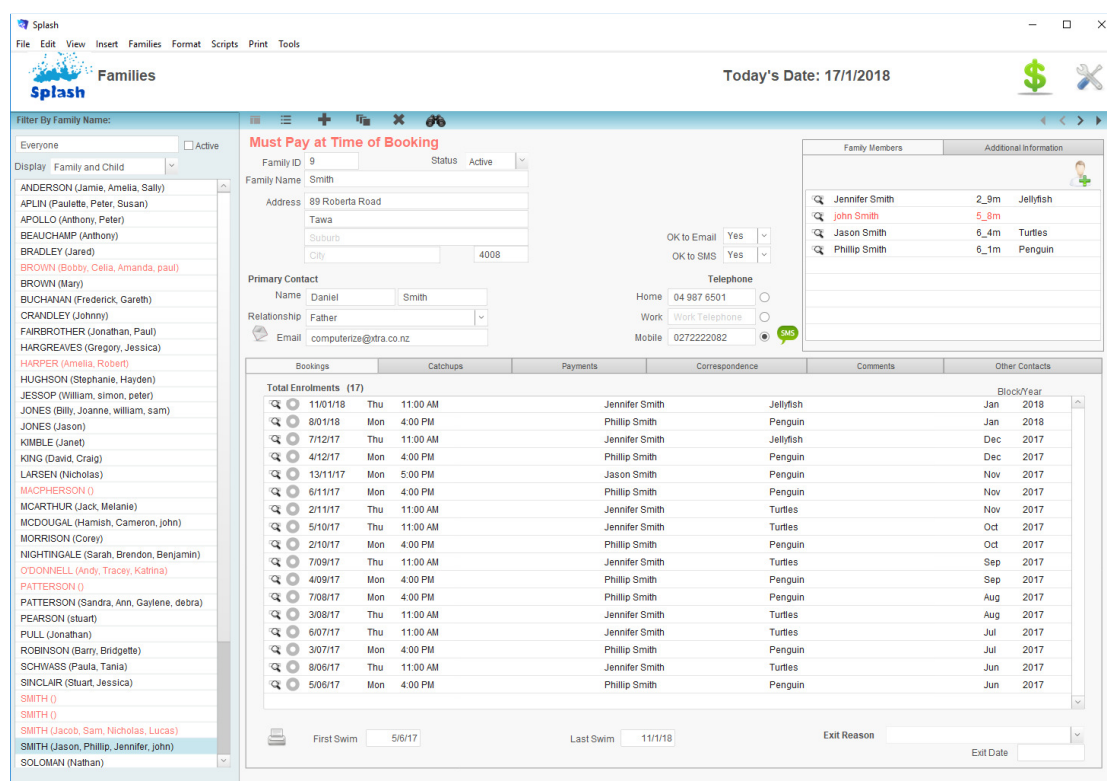
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families** icon



3. The Families data entry screen will be displayed

The Family Record

The family record contains generic information about the family and members of the family. On the right of the screen you will see four tab cards; Bookings, Accounts, Correspondence, and Custom Fields.



Must Pay at Time of Booking

Family ID: 9 Status: Active

Family Name: Smith

Address: 89 Roberta Road, Tawa, Suburb: , City: 4008

Primary Contact: Name: Daniel Smith, Relationship: Father, Email: computerize@tra.co.nz

Telephone: Home: 04 987 6501, Work: Work Telephone, Mobile: 0272222082

Family Members:

Family Member	Age	Species
Jennifer Smith	2_9m	Jellyfish
John Smith	5_8m	Turtles
Jason Smith	6_4m	Turtles
Phillip Smith	6_1m	Penguin

Bookings:

Date	Time	Family Member	Species
11/01/18	Thu 11:00 AM	Jennifer Smith	Jellyfish
8/01/18	Mon 4:00 PM	Phillip Smith	Penguin
7/12/17	Thu 11:00 AM	Jennifer Smith	Jellyfish
4/12/17	Mon 4:00 PM	Phillip Smith	Penguin
13/11/17	Mon 5:00 PM	Jason Smith	Penguin
6/11/17	Mon 4:00 PM	Phillip Smith	Penguin
2/11/17	Thu 11:00 AM	Jennifer Smith	Turtles
5/10/17	Thu 11:00 AM	Jennifer Smith	Turtles
2/10/17	Mon 4:00 PM	Phillip Smith	Penguin
7/09/17	Thu 11:00 AM	Jennifer Smith	Turtles
4/09/17	Mon 4:00 PM	Phillip Smith	Penguin
7/08/17	Mon 4:00 PM	Phillip Smith	Penguin
3/08/17	Thu 11:00 AM	Jennifer Smith	Turtles
6/07/17	Thu 11:00 AM	Jennifer Smith	Turtles
3/07/17	Mon 4:00 PM	Phillip Smith	Penguin
8/06/17	Thu 11:00 AM	Jennifer Smith	Turtles
5/06/17	Mon 4:00 PM	Phillip Smith	Penguin

First Swim: 5/6/17 Last Swim: 11/1/18 Exit Reason: Exit Date:

NB: Define the default telephone number by clicking the radio button to the right of the telephone number you would like to appear on all booking reports.

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

Family Bookings –The Bookings tab card within the family file displays a list of all bookings made by the family. Each booking line displays the payment status, day, time, class name, and block. Catchup/makeup lessons and exits are also displayed in the same list, however they are colour coded for easy identification.

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

Splash Families Today's Date: 17/1/2018

Filter By Family Name: Everyone ☐ Active

Display: Family and Child

Family ID 9 Status: Active

Family Name: Smith

Address: 89 Roberta Road
Tawa
Suburb:
City: 4008

Primary Contact: Name: Daniel Smith
Relationship: Father
Email: computerize@idra.co.nz

OK to Email: Yes ☐
OK to SMS: Yes ☐

Telephone: Home: 04 987 5501 ☐
Work: Work Telephone ☐
Mobile: 0272222082 ☒

Family Members

Family Member	Age	Class
Jennifer Smith	2_9m	Jellyfish
John Smith	5_8m	
Jason Smith	6_4m	Turtles
Phillip Smith	6_1m	Penguin

Bookings

Booking	Day	Time	Family Member	Class	Block/Year
11/01/18	Thu	11:00 AM	Jennifer Smith	Jellyfish	Jan 2018
8/01/18	Mon	4:00 PM	Phillip Smith	Penguin	Jan 2018
7/12/17	Thu	11:00 AM	Jennifer Smith	Jellyfish	Dec 2017
4/12/17	Mon	4:00 PM	Phillip Smith	Penguin	Dec 2017
13/11/17	Mon	5:00 PM	Jason Smith	Penguin	Nov 2017
6/11/17	Mon	4:00 PM	Phillip Smith	Penguin	Nov 2017
2/11/17	Thu	11:00 AM	Jennifer Smith	Turtles	Nov 2017
5/10/17	Thu	11:00 AM	Jennifer Smith	Turtles	Oct 2017
2/10/17	Mon	4:00 PM	Phillip Smith	Penguin	Oct 2017
7/09/17	Thu	11:00 AM	Jennifer Smith	Turtles	Sep 2017
4/09/17	Mon	4:00 PM	Phillip Smith	Penguin	Sep 2017
7/08/17	Mon	4:00 PM	Phillip Smith	Penguin	Aug 2017
3/08/17	Thu	11:00 AM	Jennifer Smith	Turtles	Aug 2017
6/07/17	Thu	11:00 AM	Jennifer Smith	Turtles	Jul 2017
3/07/17	Mon	4:00 PM	Phillip Smith	Penguin	Jul 2017
8/06/17	Thu	11:00 AM	Jennifer Smith	Turtles	Jun 2017
5/06/17	Mon	4:00 PM	Phillip Smith	Penguin	Jun 2017

First Swim: 5/6/17 Last Swim: 11/1/18 Exit Reason: Exit Date:

Family Catchups –The catchups/makeups tab card within the family file displays a list of all catchup lessons booked by the family.

Splash Families Today's Date: 17/1/2018

Filter By Family Name: Remove Filter

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: No ☐

Telephone: Home: 063724713 ☐
Work: Work Telephone ☐
Mobile: 0272222082 ☒

Family Members

Family Member	Age	Class
Jacob (Jake) Smith	5_5m	Penguin
Lucas Smith	5_7m	Penguin
Sam Smith	6_3m	
Nicholas Smith	6_3m	Turtles

Catchups

Catchup	Day	Time	Family Member	Class	Block/Year
19/01/18	Fri	10:30 AM	Jacob (Jake) Smith	Penguin	Jan 2018
12/01/18	Fri	8:30 AM	Jacob (Jake) Smith	Penguin	Jan 2018

Family Payments – The Payments tab card within the family file display a list of all payments made by the family for either bookings or products. Use this screen to review a history of payments or reprint a receipt.

Splash Families Today's Date: 17/1/2018

Filter By Family Name: ☐ 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

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

Family Members:

Family Member	Age	Species
Jacob (Jake) Smith	5_5m	Penguin
Lucas Smith	5_7m	Penguin
Sam Smith	6_3m	Penguin
Nicholas Smith	6_3m	Turtles

Payments:

Date	Inv ID	Description	Amt
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
9/11/17	147278	Jake Smith - Penguin - 4:00 PM Mon (Block Nov 2017)	\$1.00
9/11/17	147285	Jake Smith - Penguin - 3:30 PM Mon (Block Nov 2017)	\$1.00
9/11/17	147286	Jake Smith - Penguin - 3:30 PM Mon (Block Nov 2017)	\$2.00
9/11/17	147288	Jake Smith - Penguin - 3:30 PM Mon (Block Nov 2017)	\$2.00
9/11/17	147298	Jake Smith - Penguin - 3:30 PM Mon (Block Nov 2017)	\$3.30
9/11/17	147299	Lucas Smith - Penguin - 4:30 PM Mon (Block Nov 2017)	\$3.30
9/11/17	147301	Nicholas Smith - Turtles - 11:00 AM Thu (Block Nov 2017)	\$3.30
9/11/17	147302	Jake Smith - Penguin - 4:00 PM Mon (Block Nov 2017)	\$3.30
12/10/17	147243	Jake Smith - Penguin - 3:30 PM Mon (Term Jun 2017)	\$0.00
12/10/17	147243	Lucas Smith - Penguin - 4:30 PM Mon (Term Jun 2017)	\$0.00
12/10/17	147261	Jake Smith - Penguin - 3:30 PM Mon (Term Jun 2017)	\$54.00
12/10/17	147261	Lucas Smith - Penguin - 4:30 PM Mon (Term Jun 2017)	\$54.00

Discount Rate: 5% Type: Percent

Payment Authority Held: Yes

Withdraw funds using Bank Debit

Account Number: #####

Family Correspondence – The Correspondence tab card within the family file displays a list of all correspondence created for the selected family. To create a new item, simply click the Create Correspondence button.

Splash Families Today's Date: 17/1/2018

Filter By Family Name: ☐ 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

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

Family Members:

Family Member	Age	Species
Jacob (Jake) Smith	5_5m	Penguin
Lucas Smith	5_7m	Penguin
Sam Smith	6_3m	Penguin
Nicholas Smith	6_3m	Turtles

Correspondence:

Date	Type	Family Member	Details
15/01/18	Email	Jacob Smith	Happy Birthday
11/01/18	Letter	Jacob Smith	Happy Birthday
11/01/18	Booking	Barbara Smith	Swim School Multiple Booking Confirmation
27/10/17	Email	Barbara Smith	We are updating our Details
18/10/17	Letter	Barbara Smith	We are updating our Details

Create Correspondence +

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

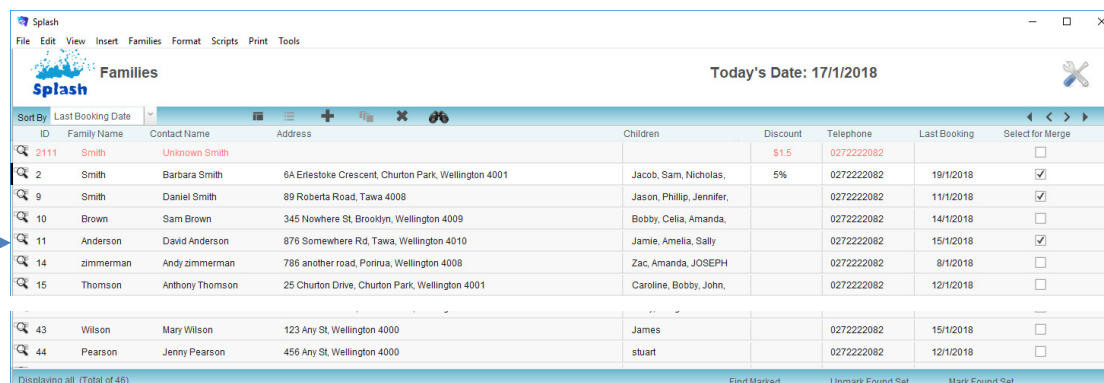
The screenshot shows the 'Comments' tab for Family ID 2 (Smith). The interface includes a menu bar (File, Edit, View, Insert, Families, Format, Scripts, Print, Tools) and a toolbar. The sidebar on the left shows a list of families, with 'SMITH (Jacob, Sam, Nicholas, Lucas)' selected. The main area displays family details: Family ID 2, Status Active, Family Name Smith, Address 6A Erlestoke Crescent, Churton Park, Wellington 4001. The 'Primary Contact' is Barbara Smith, Relationship Mother, Email barbara@computerize.co.nz. The 'Comments' field is a large text area. The 'Family Members' table shows: Jacob (Jake) Smith (5_5m, Penguin), Lucas Smith (5_7m, Penguin), Sam Smith (6_3m, Penguin), and Nicholas Smith (6_3m, Turtles). The 'Additional Information' section includes fields for Mum's Occupation, Dad's Occupation, Custom Text 3, Custom Text 4, Custom Text 5, Custom Date 1, and Custom Date 2.

Family Other Contacts – The Other Contacts tab card contains fields for recording one additional contact and one emergency contact.

The screenshot shows the 'Other Contacts' tab for Family ID 2 (Smith). The interface includes a menu bar (File, Edit, View, Insert, Families, Format, Scripts, Print, Tools) and a toolbar. The sidebar on the left shows a list of families, with 'SMITH (Jacob, Sam, Nicholas, Lucas)' selected. The main area displays family details: Family ID 2, Status Active, Family Name Smith, Address 6A Erlestoke Crescent, Churton Park, Wellington 4001. The 'Primary Contact' is Barbara Smith, Relationship Mother, Email barbara@computerize.co.nz. The 'Other Contact Person' section includes fields for Name (David Smith), Relationship, Address (6A Erlestoke Crescent, Churton Park, Wellington), Email (barbara1@computerize.co.nz), and Telephone (Home, Work, Mobile). The 'Emergency Contact Person' section includes fields for Name (First Name, Surname), Relationship, Address (6A Erlestoke Crescent, Churton Park, Wellington), Email (cartertonswimracesecretary@gmail.com), and Telephone (Home, Work, Mobile).

Listing Family 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.



ID	Family Name	Contact Name	Address	Children	Discount	Telephone	Last Booking	Select for Merge
2111	Smith	Unknown Smith			\$1.5	0272222082		<input type="checkbox"/>
2	Smith	Barbara Smith	6A Eriestoke Crescent, Churton Park, Wellington 4001	Jacob, Sam, Nicholas,	5%	0272222082	19/1/2018	<input checked="" type="checkbox"/>
9	Smith	Daniel Smith	89 Roberta Road, Tawa 4008	Jason, Phillip, Jennifer,		0272222082	11/1/2018	<input checked="" type="checkbox"/>
10	Brown	Sam Brown	345 Nowhere St Brooklyn, Wellington 4009	Bobby, Celia, Amanda,		0272222082	14/1/2018	<input type="checkbox"/>
11	Anderson	David Anderson	876 Somewhere Rd, Tawa, Wellington 4010	Jamie, Amelia, Sally		0272222082	15/1/2018	<input checked="" type="checkbox"/>
14	zimmerman	Andy zimmerman	786 another road, Porirua, Wellington 4008	Zac, Amanda, JOSEPH		0272222082	8/1/2018	<input type="checkbox"/>
15	Thomson	Anthony Thomson	25 Churton Drive, Churton Park, Wellington 4001	Caroline, Bobby, John,		0272222082	12/1/2018	<input type="checkbox"/>
43	Wilson	Mary Wilson	123 Any St, Wellington 4000	James		0272222082	15/1/2018	<input type="checkbox"/>
44	Pearson	Jenny Pearson	456 Any St, Wellington 4000	stuart		0272222082	12/1/2018	<input type="checkbox"/>

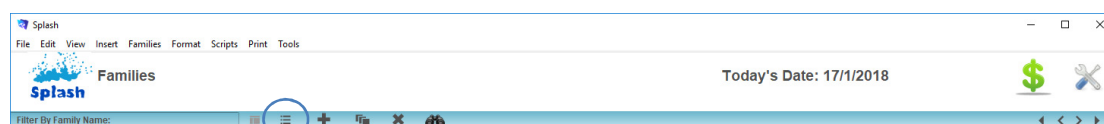
Displaying all (Total of 46)

Find Marked Unmark Found Set Mark Found Set

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

Displaying a List of Families (from Family Details)

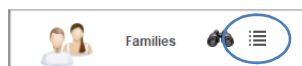
1. Click once the **List View** button displayed in the blue stripe at the top of your screen.



2. The Families List View screen will be displayed

Displaying a List of Families (from outside Family screen)

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



3. The Families List View screen will be displayed

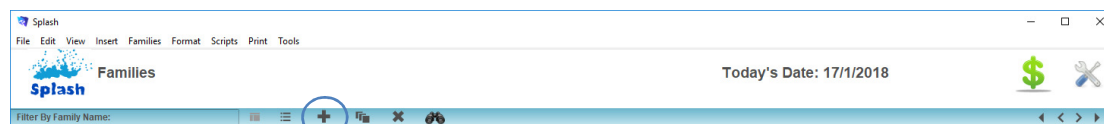
Creating a New Family

A new family record must be created whenever a new family joins the school. A student should be booked in to a session unless the family has been recorded in Splash.

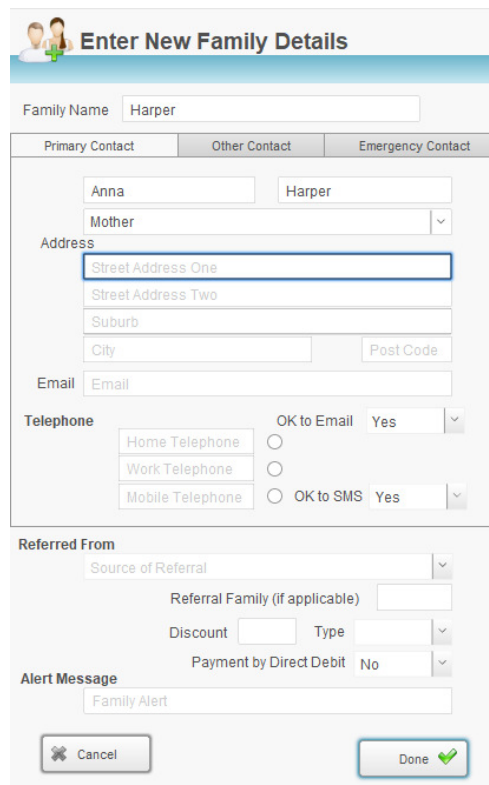
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families** icon



3. The Families data entry screen will be displayed



2. Click once on the **Add Family** button displayed in the blue stripe at the top of your screen.
3. The **Add New Family** dialog will be displayed.



Enter New Family Details

Family Name

Primary Contact Other Contact Emergency Contact

Mother

Address

Email

Telephone

Home Telephone ☐ OK to Email ☐ Yes ☐

Work Telephone ☐ OK to SMS ☐ Yes ☐

Mobile Telephone ☐

Referred From

Source of Referral

Referral Family (if applicable)

Discount Type

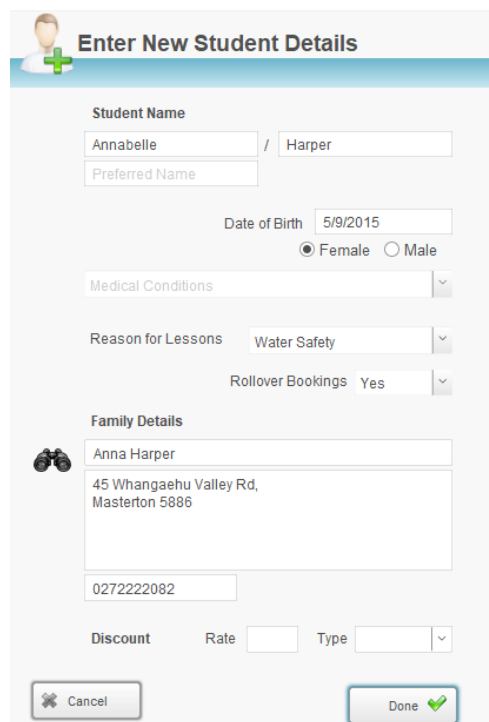
Payment by Direct Debit

Alert Message

4. Complete as many details as possible within the dialog and click the **Done** button to save the details and return to the family entry screen.
5. Continue below to add family members

Adding a Student to the Family

6. Ensure the correct family record is displayed on your screen.
7. Click the **Add Student** button to display the Add New Student dialog.
8. Complete as many details as possible within the dialog and click the **Done** button to save the student details and return to the family entry screen.
9. Repeat steps 6 & 7 above until all family members have been added.



Enter New Student Details

Student Name

/

Preferred Name

Date of Birth

☒ Female ☐ Male

Medical Conditions

Reason for Lessons

Rollover Bookings

Family Details

Discount Rate Type

Finding a Family

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



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

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

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

Updating Family Details

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

Exiting a Family

When all members of a family have withdrawn from lessons it is important you record the reason why there will be no further bookings. Information entered for exited families can be monitored in exit summary reports.

1. Use the **Finding a Family** function to locate the family record you wish to exit.
2. When the correct family screen is displayed update the **Exit Reason** field and enter the **Exit Date**.

The screenshot shows the 'Splash Families' software interface. At the top, there's a menu bar with options like File, Edit, View, Insert, Families, Format, Scripts, Print, and Tools. Below the menu, the 'Splash Families' logo is on the left, and 'Today's Date: 17/1/2018' is on the right. A search bar is also present. The main area is divided into several sections. On the left, there's a 'Filter By Family Name:' section with a list of family names. The central part of the screen displays the details for a family named 'Harper'. This includes fields for Family ID (39123), Status (Active), Family Name (Harper), Address (45 Whangapehu Valley Rd), Suburb (Masterton), and Postcode (5886). There are also fields for Primary Contact (Name: Anna, Relationship: Mother, Email: barbara@computerize.co.nz) and Telephone (Home, Work, Mobile). A list of family members is shown on the right, including Annabelle Harper (2_4m). At the bottom, there are tabs for Bookings, Catchups, Payments, Correspondence, Comments, and Other Contacts. The 'Additional Information' tab is highlighted, showing fields for Discount Rate, Type, Referred From (Signage), Referral Family (if applicable), Exit Reason, Exit Date, and Alert Message. A green 'SMS' button is visible next to the Mobile telephone number.

NB: Exit information may also be entered in the Additional Information tab card in the centre of the family record screen

This screenshot shows the 'Additional Information' tab within the family record screen. It contains several input fields: 'Discount Rate' (a text box), 'Type' (a dropdown menu), 'Referred From' (a text box with 'Signage' entered), 'Referral Family (if applicable)' (a text box), 'Exit Reason' (a dropdown menu), 'Exit Date' (a text box), and 'Alert Message' (a large text area). A blue arrow points from the text above to the 'Additional Information' tab header.

Sending a SMS Message

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

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. When the correct family screen is displayed simply click the SMS button displayed to the left of the Mobile telephone number.



Splash Families Today's Date: 17/1/2018

Filter by Family Name: Everyone ☐ Active

Display: Family and Child

Family ID: 2 Status: Active

Family Name: Smith

Address: 6A Enfestoke 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 Additional Information Discount Rate: 5% Type: Percent Referred From: School Referral Family (if applicable): Exit Reason: Poor Service Exit Date: 19/3/2014 Alert Message:

Bookings	Catchups	Payments	Correspondence	Comments	Other Contacts
Total Enrolments (27)					
11/01/18	Thu 3:30 PM		Jacob (Jake) Smith	Penguin	Block/Year Jan 2018
11/01/18	Thu 11:00 AM		Nicholas Smith	Turtles	Jan 2018
10/01/18	Wed 4:00 PM		Jacob (Jake) Smith	Penguin	Jan 2018
8/01/18	Mon 4:30 PM		Lucas Smith	Penguin	Jan 2018
7/12/17	Thu 11:00 AM		Nicholas Smith	Turtles	Dec 2017
6/12/17	Wed 4:00 PM		Jacob (Jake) Smith	Penguin	Dec 2017
4/12/17	Mon 3:30 PM		Jacob (Jake) Smith	Penguin	Dec 2017
4/12/17	Mon 4:30 PM		Lucas Smith	Penguin	Dec 2017
6/11/17	Mon 3:30 PM		Jacob (Jake) Smith	Penguin	Nov 2017
6/11/17	Mon 4:30 PM		Lucas Smith	Penguin	Nov 2017
6/11/17	Mon 4:00 PM		Jacob (Jake) Smith	Penguin	Nov 2017
2/11/17	Thu 11:00 AM		Nicholas Smith	Turtles	Nov 2017
5/10/17	Thu 11:00 AM		Nicholas Smith	Turtles	Oct 2017
2/10/17	Mon 3:30 PM		Jacob (Jake) Smith	Penguin	Oct 2017
2/10/17	Mon 4:30 PM		Lucas Smith	Penguin	Oct 2017
7/09/17	Thu 11:00 AM		Nicholas Smith	Turtles	Sep 2017
4/09/17	Mon 3:30 PM		Jacob (Jake) Smith	Penguin	Sep 2017
4/09/17	Mon 4:30 PM		Lucas Smith	Penguin	Sep 2017

First Swim: 5/6/17 Last Swim: 19/1/18 Exit Reason: Poor Service Exit Date: 19/3/2014

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

Create SMS

Edit Tools

Enter New SMS

Message

Thank you for your enquiry, we look forward to meeting Sam tomorrow for his assessment

Message Length : 86 Chars

Cancel Done

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

NB: Each SMS message is sent via your email application

Processing a Payment

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. Click once on the **Dollar Symbol** displayed on the top right of the screen.

Splash Families

Today's Date: 17/1/2018

Filter By Family Name:

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_5m	Penguin
Lucas Smith	5_7m	Penguin
Sam Smith	6_3m	
Nicholas Smith	6_3m	Turtles

Bookings:

Enrolment	Block/Year
11/01/18 Thu 3:30 PM Jacob (Jake) Smith Penguin	Jan 2018
11/01/18 Thu 11:00 AM Nicholas Smith Turtles	Jan 2018
10/01/18 Wed 4:00 PM Jacob (Jake) Smith Penguin	Jan 2018
8/01/18 Mon 4:30 PM Lucas Smith Penguin	Jan 2018
7/12/17 Thu 11:00 AM Nicholas Smith Turtles	Dec 2017
6/12/17 Wed 4:00 PM Jacob (Jake) Smith Penguin	Dec 2017
4/12/17 Mon 3:30 PM Jacob (Jake) Smith Penguin	Dec 2017
4/12/17 Mon 4:30 PM Lucas Smith Penguin	Dec 2017
6/11/17 Mon 3:30 PM Jacob (Jake) Smith Penguin	Nov 2017
6/11/17 Mon 4:30 PM Lucas Smith Penguin	Nov 2017
6/11/17 Mon 4:00 PM Jacob (Jake) Smith Penguin	Nov 2017
2/11/17 Thu 11:00 AM Nicholas Smith Turtles	Nov 2017
5/10/17 Thu 11:00 AM Nicholas Smith Turtles	Oct 2017
2/10/17 Mon 3:30 PM Jacob (Jake) Smith Penguin	Oct 2017
2/10/17 Mon 4:30 PM Lucas Smith Penguin	Oct 2017
7/09/17 Thu 11:00 AM Nicholas Smith Turtles	Sep 2017
4/09/17 Mon 3:30 PM Jacob (Jake) Smith Penguin	Sep 2017
4/09/17 Mon 4:30 PM Lucas Smith Penguin	Sep 2017

First Swim: 5/6/17 Last Swim: 19/1/18 Exit Reason: Poor Service Exit Date: 19/3/2014

- The POS Sales Entry screen will be displayed. The selected family details will be entered with all outstanding bookings displayed on the right of the screen.

Splash POS

POS Tools

Invoice # 147319 POS 1 Shift: 2842 Date: 17/01/2018 Time: 11:35:35 AM Barbara Smith

Family ID: 2 SMITH (Barbara Smith)

With Balance Zero Balance

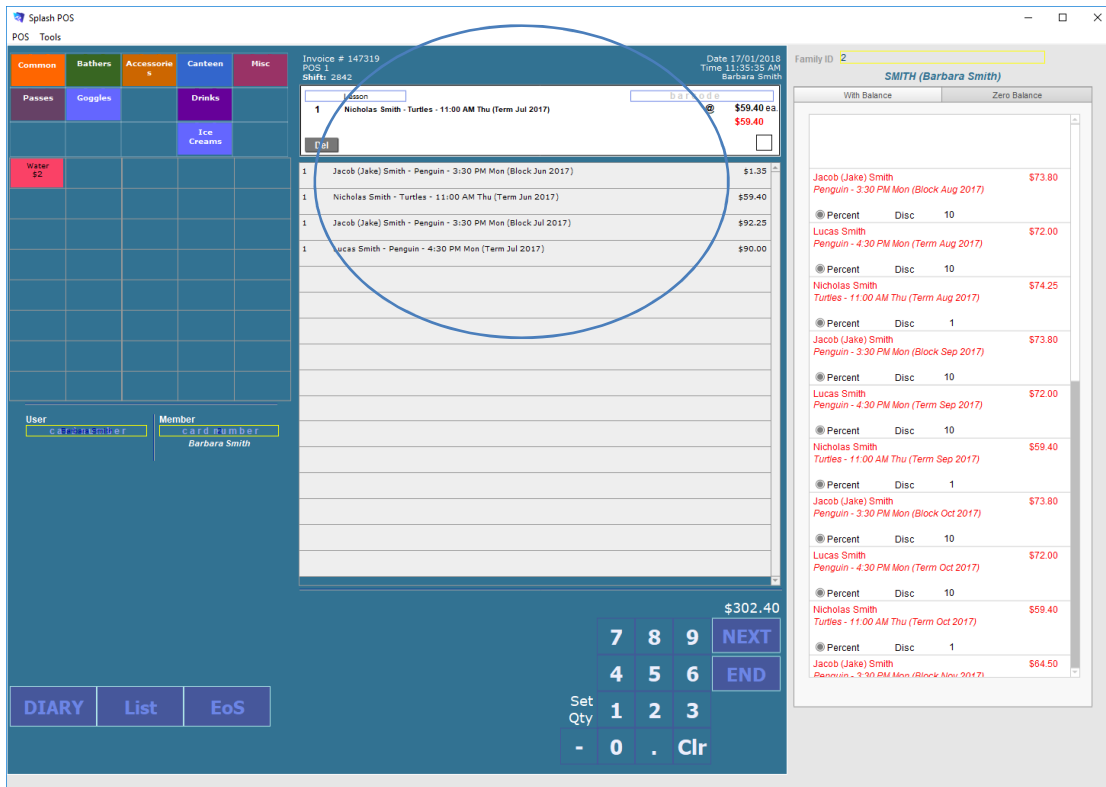
Item	Amount
Jacob (Jake) Smith Penguin - 3:30 PM Mon (Block Jun 2017)	\$1.35
Nicholas Smith Turtles - 11:00 AM Thu (Term Jun 2017)	\$59.40
Jacob (Jake) Smith Penguin - 3:30 PM Mon (Block Jul 2017)	\$92.25
Lucas Smith Penguin - 4:30 PM Mon (Term Jul 2017)	\$90.00
Nicholas Smith Turtles - 11:00 AM Thu (Term Jul 2017)	\$59.40
Jacob (Jake) Smith Penguin - 3:30 PM Mon (Block Aug 2017)	\$73.80
Lucas Smith Penguin - 4:30 PM Mon (Term Aug 2017)	\$72.00
Nicholas Smith Turtles - 11:00 AM Thu (Term Aug 2017)	\$74.25
Jacob (Jake) Smith Penguin - 3:30 PM Mon (Block Sep 2017)	\$73.80
Lucas Smith Penguin - 4:30 PM Mon (Term Sep 2017)	\$72.00
Nicholas Smith Turtles - 11:00 AM Thu (Term Sep 2017)	\$59.40

User: Barbara Smith Member: 2 Barbara Smith

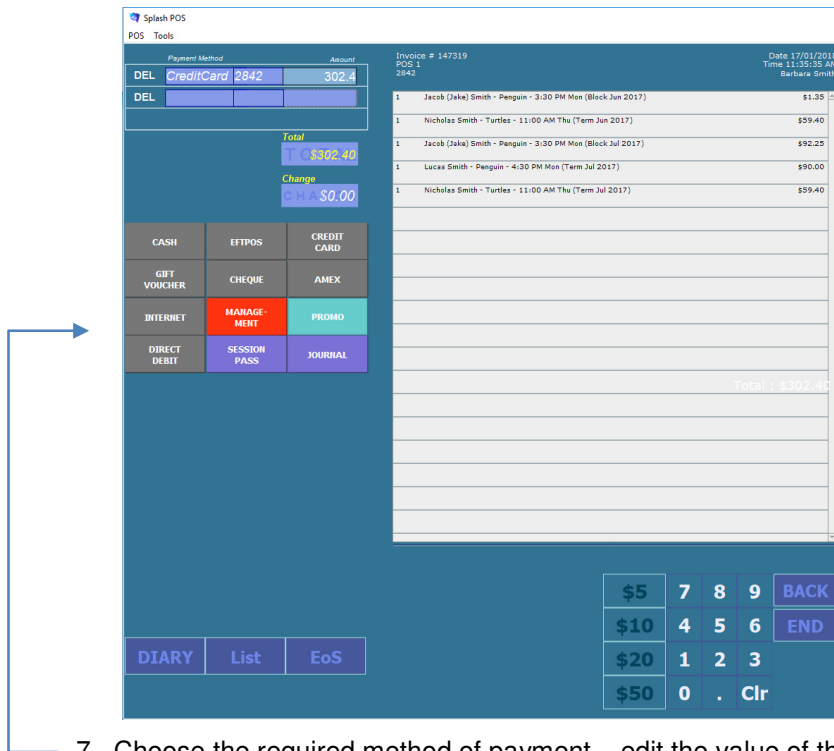
DIARY List EoS

Set Qty: 7 8 9 NEXT 4 5 6 END 1 2 3 - 0 . Clr

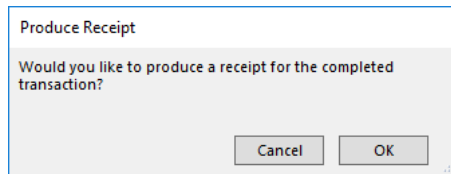
- Select the booking/s you would like to pay for by clicking once on each booking on the right of the screen.



5. When all the bookings you wish to process are displayed in the centre of the screen, click the END button (if paying by Cash or Eftpos) or click NEXT to specify alternative payment methods.
6. If NEXT is clicked the End Sale screen will be displayed.



7. Choose the required method of payment – edit the value of the payment and select and select additional payment types for the same sale if required.
8. Click the END button to complete the sale.
9. If your receipt preferences are set to **Ask** the produce receipt dialog will be displayed.



10. Click the DIARY button to exit the Sale Entry screen.

NB: To amend the content of the sale, click the BACK button to return to the Sale Entry screen.

Viewing a History of Payments

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. Click once on the **Accounts** tab card displayed on the right of the screen.

The screenshot shows the "Splash Families" software interface. The "Accounts" tab is selected, displaying a list of payments. The left sidebar shows a list of family members, and the right sidebar shows family details. The main area displays a table of payments with columns for Date, Inv ID, Description, and Amount.

Date	Inv ID	Description	Amount
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
9/11/17	147278	Jake Smith - Penguin - 4:00 PM Mon (Block Nov 2017)	\$1.00
9/11/17	147285	Jake Smith - Penguin - 3:30 PM Mon (Block Nov 2017)	\$1.00
9/11/17	147286	Jake Smith - Penguin - 3:30 PM Mon (Block Nov 2017)	\$2.00
9/11/17	147288	Jake Smith - Penguin - 3:30 PM Mon (Block Nov 2017)	\$2.00
9/11/17	147298	Jake Smith - Penguin - 3:30 PM Mon (Block Nov 2017)	\$3.30
9/11/17	147299	Lucas Smith - Penguin - 4:30 PM Mon (Block Nov 2017)	\$3.30
9/11/17	147301	Nicholas Smith - Turtles - 11:00 AM Thu (Block Nov 2017)	\$3.30
9/11/17	147302	Jake Smith - Penguin - 4:00 PM Mon (Block Nov 2017)	\$3.30
12/10/17	147243	Jake Smith - Penguin - 3:30 PM Mon (Term Jun 2017)	\$0.00

Viewing or Reprinting a Receipt

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. Click once on the **Accounts** tab card displayed on the right of the screen.
3. Click once on the **magnifier** displayed to the left of the required payment.

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

4. A copy of the receipt will be displayed on your screen.

Invoice 147319

YOUR SWIM SCHOOL NAME HERE
Wellington
Telephone:

ABN: Invoice # : 147319 (POS 1)
17 Jan 2018 11:35:35 AM

Barbara Smith
6A Erlestoke Crescent,
Churton Park,
Wellington 4001

Thank you for your payment for the following items:

Description	Qty	Unit \$	Total
48128 - Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block Jun 2017)	1	\$1.35	\$1.35
Nicholas Smith - Turtles - 11:00 AM Thu (Term Jun 2017)	1	\$59.40	\$59.40
Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block Jul 2017)	1	\$92.25	\$92.25
Lucas Smith - Penguin - 4:30 PM Mon (Term Jul 2017)	1	\$90.00	\$90.00
Nicholas Smith - Turtles - 11:00 AM Thu (Term Jul 2017)	1	\$59.40	\$59.40
Total Inc GST			\$302.40
GST Amt			\$0.00
Payment Method			
CreditCard			\$302.40

Close Print

- Click the **Print** button to reprint the receipt or click **Close** to return to the family screen without printing the receipt.

Generating Family Documents

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

Document records can be created as letters, emails, SMS messages, or file notes.

- Use the **Finding a Family** function to locate the family record you wish to update.
- Click once on the **Correspondence** tab card displayed on the right of the screen.

Splash

File Edit View Insert Families Format Scripts Print Tools

Families Today's Date: 17/1/2018

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

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

Family Members: Jacob (Jake) Smith 5_5m Penguin Lucas Smith 5_7m Penguin Sam Smith 6_3m Turtles Nicholas Smith 6_3m Turtles

Bookings Catchups Payments Correspondence Comments Other Contacts

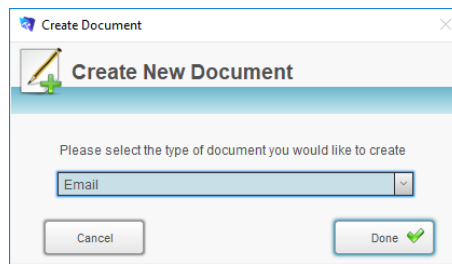
Create Correspondence

Date	Type	Subject	Details
15/01/18	Email	Jacob Smith	Happy Birthday
11/01/18	Letter	Jacob Smith	Happy Birthday
11/01/18	Booking	Barbara Smith	Swim School Multiple Booking Confirmation
27/10/17	Email	Barbara Smith	We are updating our Details
18/10/17	Letter	Barbara Smith	We are updating our Details

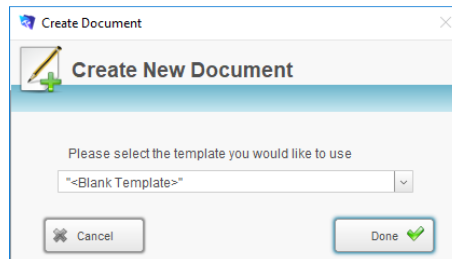
- Click once on the **Add Correspondence** button to display the **Create Document** dialog box.

Create Correspondence 

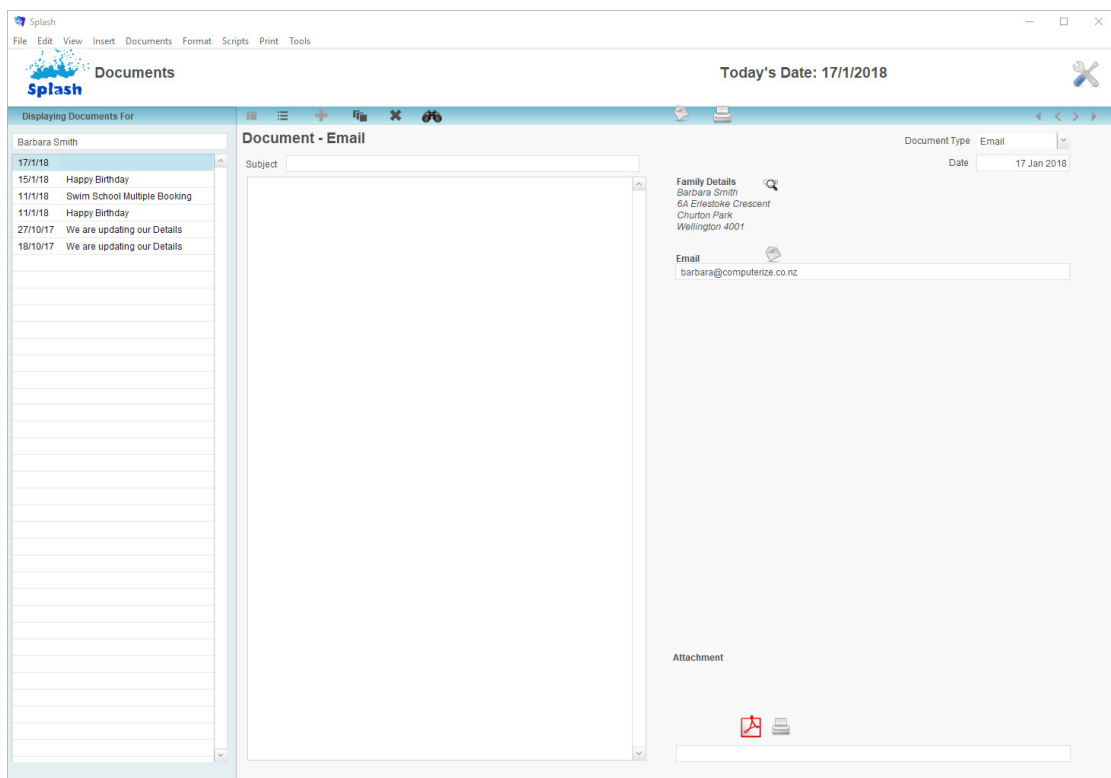
- Choose the type of document you want to create and click the **Done** button.



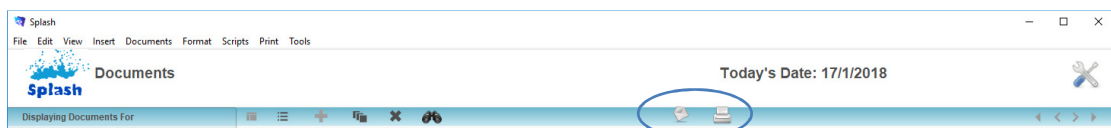
5. The **Create Document** dialog box will be displayed on your screen. Select the document you wish to use or click Use Blank Document and click **Done**.



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

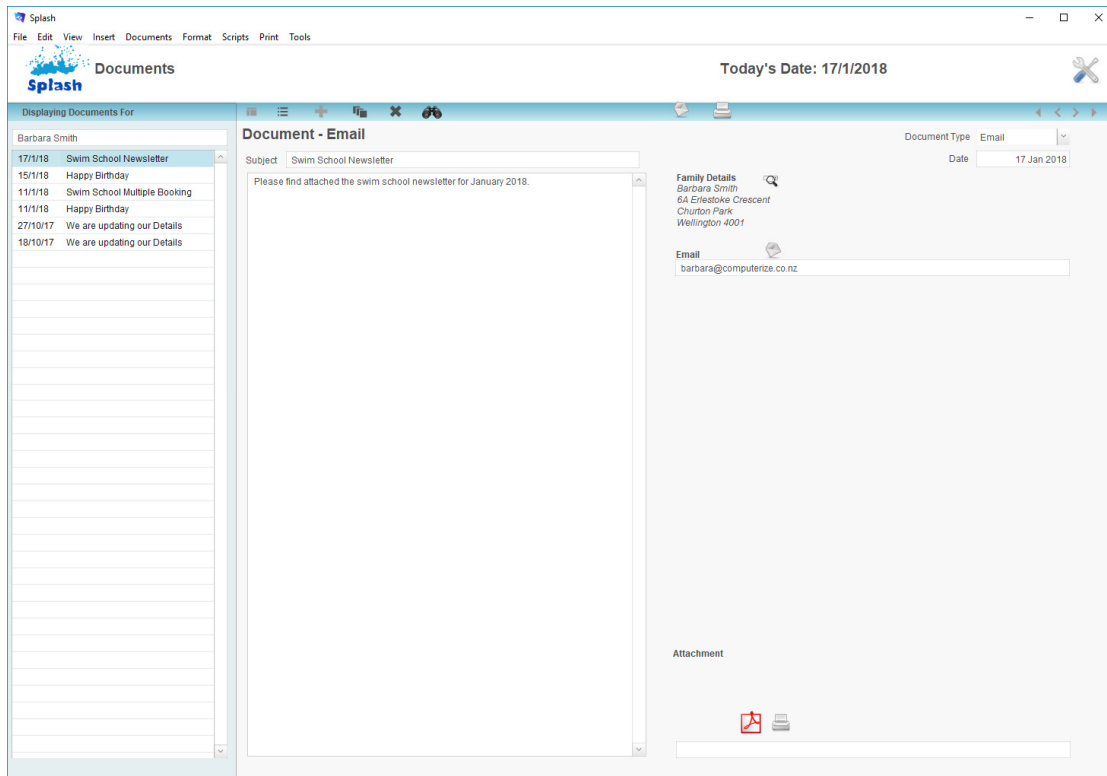


7. Edit the document as necessary.
8. Click the **Print** or **Email** button.



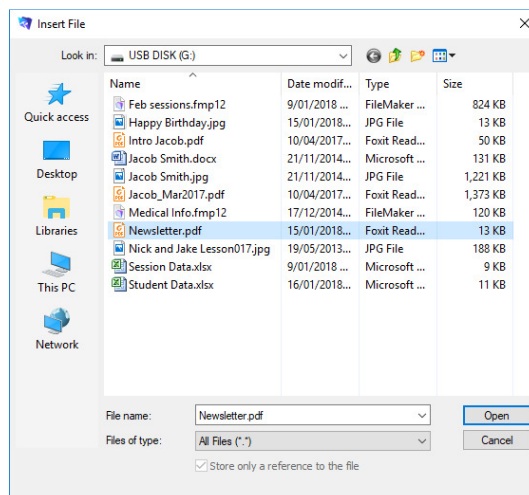
Adding an Attachment to an Email

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

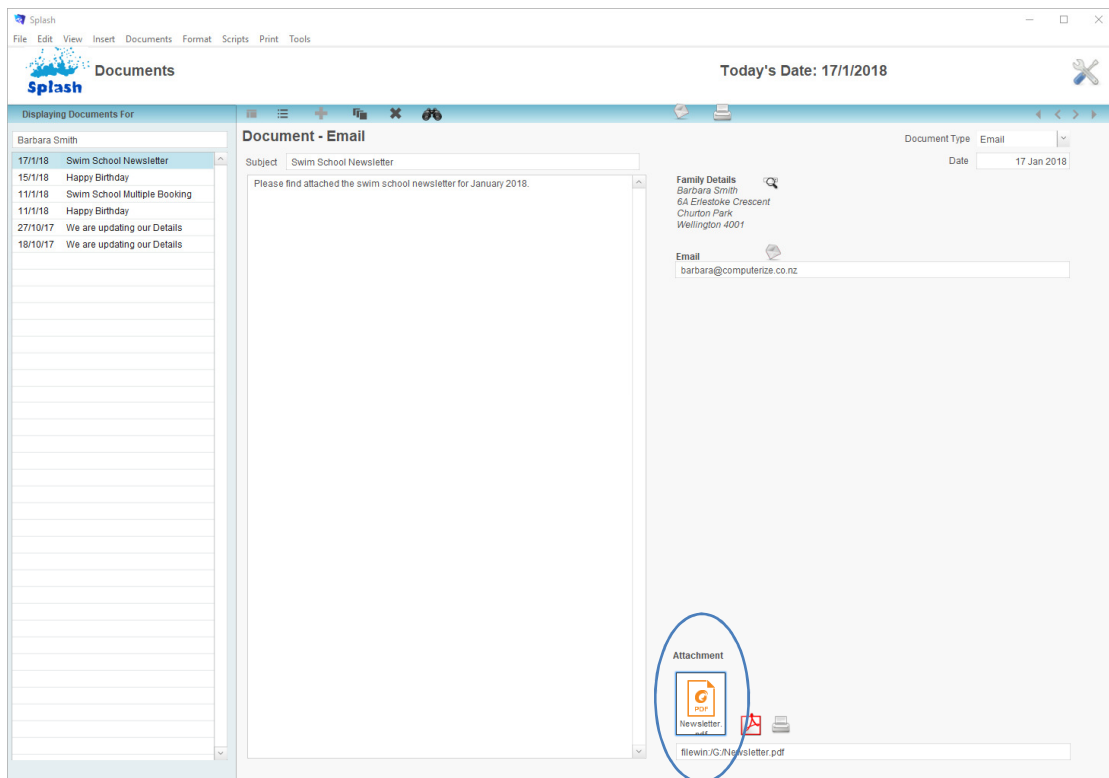


NB: The Attachment field and buttons are only on the screen for email document types.

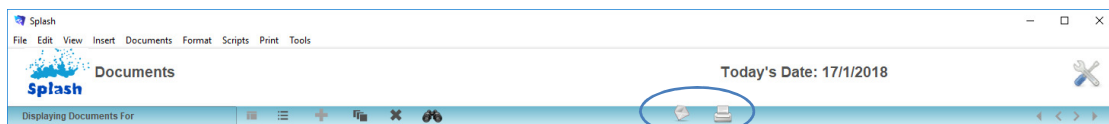
6. Ensure the correct email document is displayed on your screen.
7. Click once on the **Insert PDF** button.
8. The Insert File dialog will be displayed on your screen. Locate the file you wish to attach and click the Insert button.



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



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



NB: If you want to print the attachment double click the document icon to open it then choose print from the application it is displayed in.

Creating a Family Statement

A family statement contains a list of bookings for the selected family. The list can be filtered to show a selection of bookings or can include all bookings ever recorded for the family. The subsequent report can be printed or automatically emailed to the selected family.

1. Use the **Finding a Family** function to locate the family record you wish to produce.
2. When the correct family screen is displayed simply click the **Print Statement of Activity** button below the list of bookings.

Splash Families Today's Date: 17/1/2018

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: 027222082

Family Members

Family Member	Age	Species
Jacob (Jake) Smith	5_5m	Penguin
Lucas Smith	5_7m	Penguin
Sam Smith	6_3m	Penguin
Nicholas Smith	6_3m	Turtles

Bookings

Booking	Date	Time	Family Member	Species	Block/Year
Total Enrolments (27)					
11/01/18	Thu	3:30 PM	Jacob (Jake) Smith	Penguin	Jan 2018
11/01/18	Thu	11:00 AM	Nicholas Smith	Turtles	Jan 2018
10/01/18	Wed	4:00 PM	Jacob (Jake) Smith	Penguin	Jan 2018
8/01/18	Mon	4:30 PM	Lucas Smith	Penguin	Jan 2018
7/12/17	Thu	11:00 AM	Nicholas Smith	Turtles	Dec 2017
6/12/17	Wed	4:00 PM	Jacob (Jake) Smith	Penguin	Dec 2017
4/12/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Dec 2017
4/12/17	Mon	4:30 PM	Lucas Smith	Penguin	Dec 2017
6/11/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Nov 2017
6/11/17	Mon	4:30 PM	Lucas Smith	Penguin	Nov 2017
6/11/17	Mon	4:00 PM	Jacob (Jake) Smith	Penguin	Nov 2017
2/11/17	Thu	11:00 AM	Nicholas Smith	Turtles	Nov 2017
5/10/17	Thu	11:00 AM	Nicholas Smith	Turtles	Oct 2017
2/10/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Oct 2017
2/10/17	Mon	4:30 PM	Lucas Smith	Penguin	Oct 2017
7/09/17	Thu	11:00 AM	Nicholas Smith	Turtles	Sep 2017
4/09/17	Mon	3:30 PM	Jacob (Jake) Smith	Penguin	Sep 2017
4/09/17	Mon	4:30 PM	Lucas Smith	Penguin	Sep 2017

First Swim: 5/6/17 Last Swim: 19/1/18

Exit Reason: Poor Service Exit Date: 19/3/2014

Print Account Statement

3. The **Specify Records for Reporting** dialog will be displayed on your screen.

4. Select one of the following;

Balance – to include bookings with an outstanding balance

Some – to include bookings within a specified date range

All – to include all bookings ever made for related family members

Specify Records for Reporting

Would you like to include ALL booking records or SOME bookingsrecords or only bookings with a BALANCE in the activity report

Balance Some All

5. The report will be previewed on your screen.

Bookings - Current Balance of Booking									
Balance as at 17/1/2018									
					Cost (Less Discount/Credits)		Paid		Balance
Smith (Barbara Smith)					0272222082	\$1,384.20	\$22.20		\$1,362.00
SMITH Jacob (Jake)	Penguin	Mon	BS	Block: Aug 2017	\$73.80		\$0.00		\$73.80
SMITH Jacob (Jake)	Penguin	Mon	BS	Block: Sep 2017	\$73.80		\$0.00		\$73.80
SMITH Jacob (Jake)	Penguin	Mon	BS	Block: Oct 2017	\$73.80		\$0.00		\$73.80
SMITH Jacob (Jake)	Penguin	Mon	BS	Block: Nov 2017	\$73.80		\$9.30		\$64.50
SMITH Jacob (Jake)	Penguin	Mon	BS	Block: Nov 2017	\$73.80		\$4.30		\$69.50
SMITH Jacob (Jake)	Penguin	Mon	BS	Block: Dec 2017	\$55.35		\$0.00		\$55.35
SMITH Jacob (Jake)	Penguin	We	LW	Block: Dec 2017	\$55.35		\$0.00		\$55.35
SMITH Jacob (Jake)	Penguin	We	LW	Block: Jan 2018	\$73.80		\$0.00		\$73.80
SMITH Jacob (Jake)	Penguin	Thu	BS	Block: Jan 2018	\$55.35		\$0.00		\$55.35
SMITH Lucas	Penguin	Mon	BS	Block: Aug 2017	\$72.00		\$0.00		\$72.00
SMITH Lucas	Penguin	Mon	BS	Block: Sep 2017	\$72.00		\$0.00		\$72.00
SMITH Lucas	Penguin	Mon	BS	Block: Oct 2017	\$72.00		\$0.00		\$72.00
SMITH Lucas	Penguin	Mon	BS	Block: Nov 2017	\$73.80		\$4.30		\$69.50
SMITH Lucas	Penguin	Mon	BS	Block: Dec 2017	\$55.35		\$0.00		\$55.35
SMITH Lucas	Penguin	Mon	BS	Block: Jan 2018	\$73.80		\$0.00		\$73.80
SMITH Nicholas	Turtles	Thu	DS	Block: Aug 2017	\$74.25		\$0.00		\$74.25
SMITH Nicholas	Turtles	Thu	DS	Block: Sep 2017	\$59.40		\$0.00		\$59.40
SMITH Nicholas	Turtles	Thu	DS	Block: Oct 2017	\$59.40		\$0.00		\$59.40
SMITH Nicholas	Turtles	Thu	DS	Block: Nov 2017	\$74.25		\$4.30		\$69.95
SMITH Nicholas	Turtles	Thu	DS	Block: Dec 2017	\$44.55		\$0.00		\$44.55
SMITH Nicholas	Turtles	Thu	DS	Block: Jan 2018	\$44.55		\$0.00		\$44.55

17/1/2018 : 02:01:30 PM

Page 1

6. Press **Enter** or click the continue button to progress to the print or email options.
7. Select whether you wish to **Email** or **Print** the selected report (or choose Cancel to return to the family file without printing or emailing).

Message

Do you want to PRINT or EMAIL the Summary of Family Activity?

NB: If Email is selected the email will be displayed with the document attached. Edit the email and click the Send button.

Activity Report for Family

File Message Insert Options

Clipboard Font Paragraph Plain text

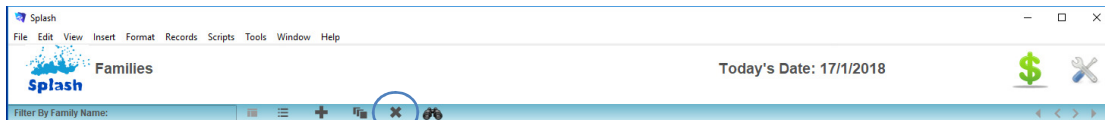
To... barbara@computerize.co.nz From barbara@computerize.co.nz
 Cc...
 Bcc...
 Subject Activity Report for Family [Hide Cc & Bcc](#)
 @ Family Activity Report.pdf (68.4 KB)

Please find attached the latest record of activity for the Smith family.

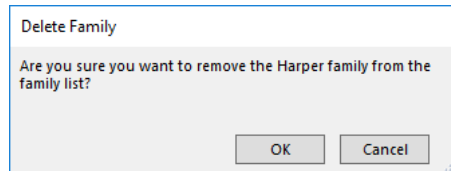
Deleting a Family Record

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

1. Use the **Finding a Family** function to locate the family record you wish to exit.
2. When the correct family record is displayed on your screen.



3. Click once on the **Delete Family** button.
4. A dialog will be displayed asking you to confirm the family record should be deleted.



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

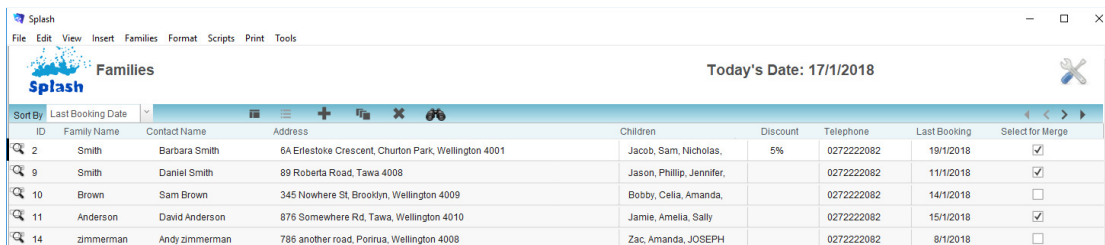
Sending a Broadcast SMS Message

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

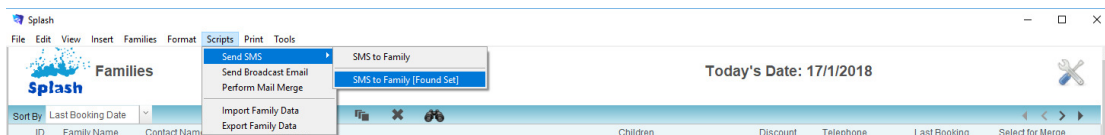
Group SMS messages are sent to all recipients in the found set that have a valid mobile telephone number stored on file.

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

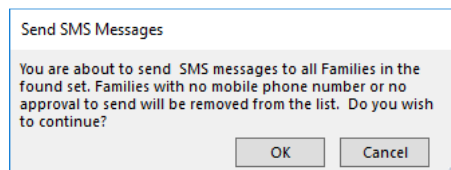
1. Use the **Finding a Family** function to locate the group of records you wish to send a message to. Locate only families with a mobile telephone number by placing an asterisk (*) in the mobile field along with any other find criteria.
2. The found set of records will be displayed in a list on your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



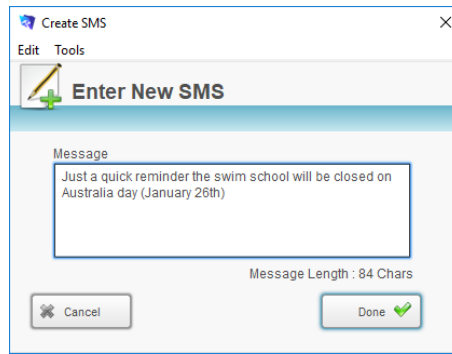
3. Select the **Scripts** menu... choose **Send SMS**...choose **Send SMS to Family [Found Set]**.



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



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



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

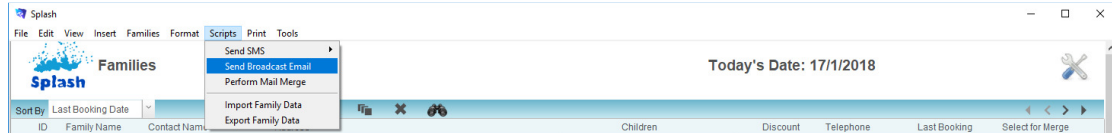
NB: Each SMS message is sent via your default email application.

Sending a Broadcast Email

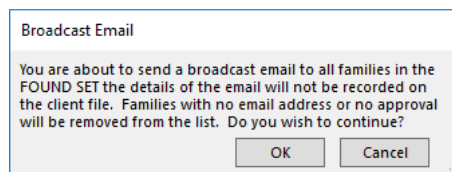
A broadcast email is a single email sent to multiple recipients. An email sent in this way will not be recorded on the family file.

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

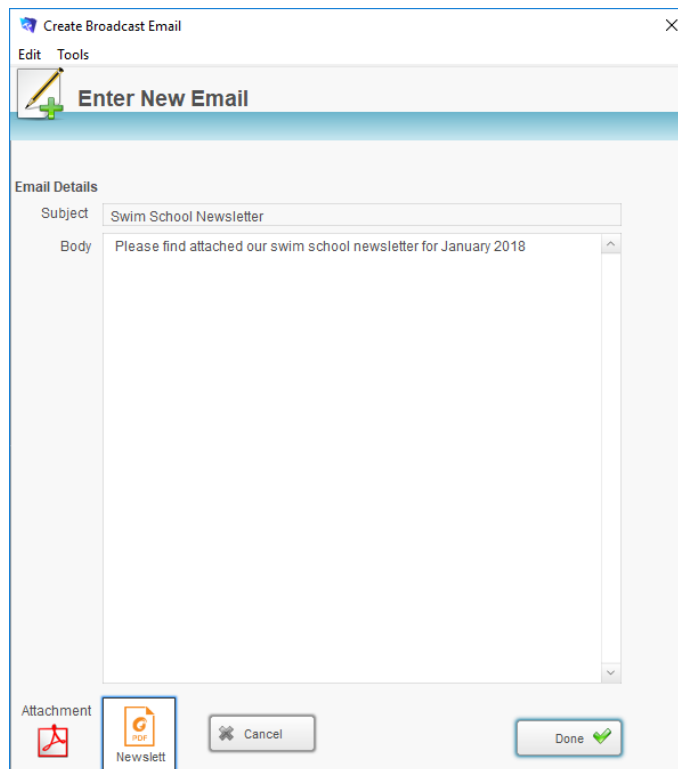
1. Use the **Finding a Family** function to locate the group of records you wish to send a message to. Locate only families with an email address by placing an asterisk (*) in the email field along with any other find criteria.
2. The found set of records will be displayed in a list on your screen. (if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



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



5. The **Enter Broadcast Email** dialog will be displayed on your screen.



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

NB: To ensure the privacy of all clients the email address will automatically be placed in the BCC box. Look in the Sent Items folder of your email application to review the documents which have been sent.

Generating a Family Mail Merge

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

ID	Family Name	Contact Name	Address	Children	Discount	Telephone	Last Booking	Select for Merge
2	Smith	Barbara Smith	6A Eriestoke Crescent, Churton Park, Wellington 4001	Jacob, Sam, Nicholas,	5%	0272222082	19/12/2018	<input checked="" type="checkbox"/>
9	Smith	Daniel Smith	89 Roberta Road, Tawa 4008	Jason, Phillip, Jennifer,		0272222082	11/1/2018	<input checked="" type="checkbox"/>
10	Brown	Sam Brown	345 Nowhere St, Brooklyn, Wellington 4009	Bobby, Celia, Amanda,		0272222082	14/1/2018	<input checked="" type="checkbox"/>
11	Anderson	David Anderson	876 Somewhere Rd, Tawa, Wellington 4010	Jamie, Amelia, Sally		0272222082	15/1/2018	<input checked="" type="checkbox"/>
14	zimmerman	Andy zimmerman	786 another road, Porirua, Wellington 4008	Zac, Amanda, JOSEPH		0272222082	8/1/2018	<input checked="" type="checkbox"/>
15	Thomson	Anthony Thomson	25 Churton Drive, Churton Park, Wellington 4001	Caroline, Bobby, John,		0272222082	12/1/2018	<input checked="" type="checkbox"/>
16	King	Nathan King	46 Brooklyn Rd, Brooklyn, Wellington 4008	David, Craig		0272222082	12/1/2018	<input checked="" type="checkbox"/>
17	White	Julie White	76 Moorefield Road, Johnsonville, Wellington 4001	Jane		0272222082	9/1/2018	<input checked="" type="checkbox"/>
18	Fairbrother	Mark Fairbrother	56 Watt St, Tahiti Bay, Wellington 4012	Jonathan, Paul		0272222082	16/1/2018	<input checked="" type="checkbox"/>

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

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

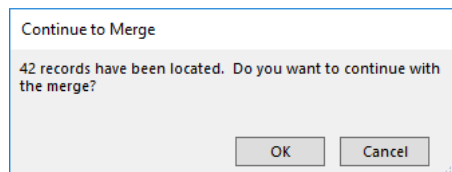


3. The Families List View screen will be displayed.
4. Click once on the **Find Marked** button displayed at the bottom right of the screen. This command will display a list of all families that are currently marked.

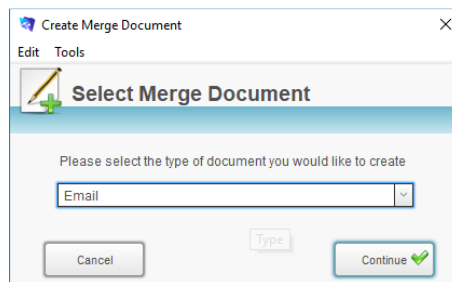
5. Click once on the **Unmarked Found Set** button. This will clear all previously marked records.

2112	Williamson	John Williamson	987 Essex St, Masterford 5886	Peter	0272222082	15/12/2018	<input checked="" type="checkbox"/>
Displaying found set (42 out of 47)				Find Marked	Unmark Found Set	Mark Found Set	

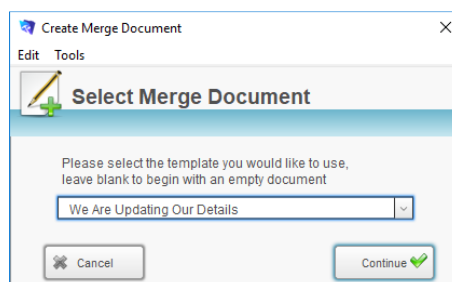
6. Use the **Finding a Family** function to locate the group of records you wish to send a message to.
7. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 4)
8. When the list is correct click once on the **Mark Found Set** button. A tick should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



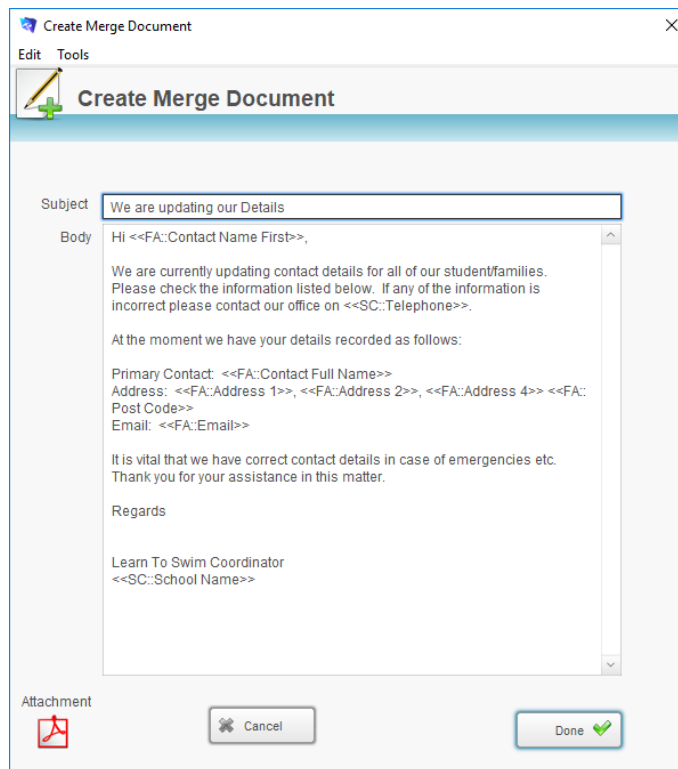
12. The **Create Merge Document** dialog will be displayed asking you to define the type of document you wish to create. Select the required type of document from the drop-down menu provided.



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



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



17. Click the **Done** button to complete the merge or **Cancel** to exit the script without completing the merge.

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

Importing Family Data

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

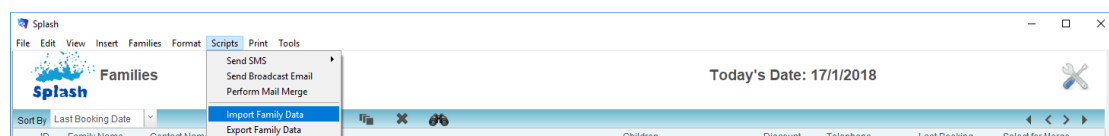
- add new records from the source file
- update records with information from the source file
- update matching records with information from the source file

Importing Records from Excel

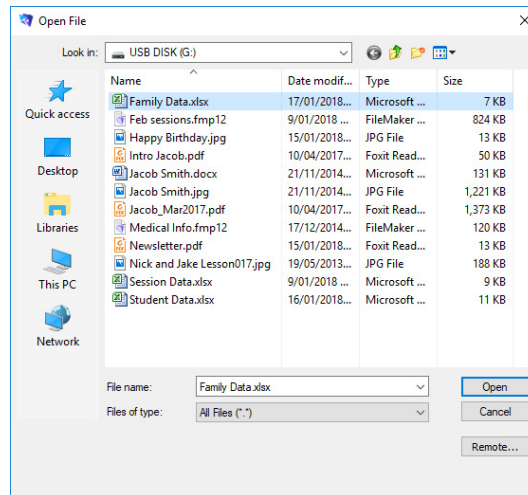
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families List** icon



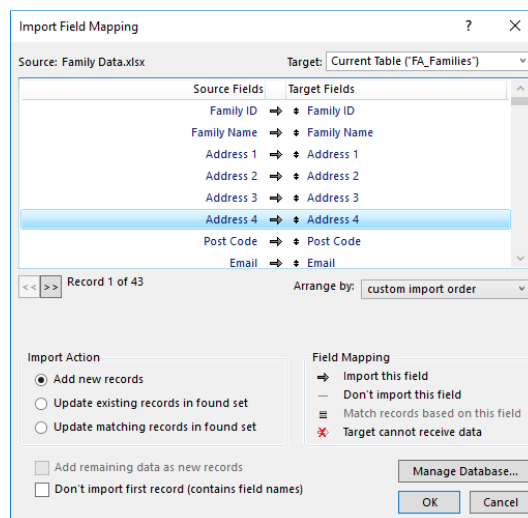
3. The Families List View screen will be displayed.
4. Select **Import Family Data** from the **Scripts** menu.



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



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



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

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



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

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

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

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

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

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

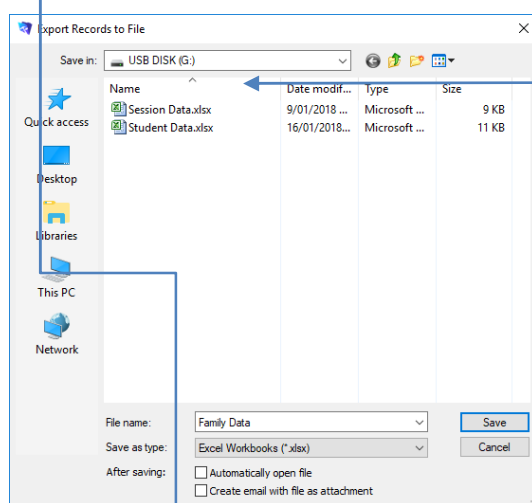
11. When all fields have been aligned correctly, click the **Import** button.

Exporting Family Data

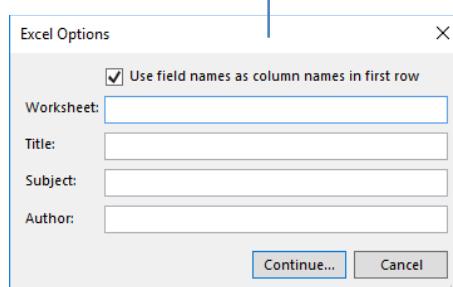
You can export Splash data to a new file and then open it in another application . For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

Exporting Records to Excel

1. Use the **Finding a Family** 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 Family Data** from the **Scripts** menu.
4. The **Export Records to File** dialog will be displayed on your screen.
5. Enter the name you wish to call your file and choose a location to store the file.



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



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

Specify Field Order for Export

Select and move the fields to be exported. If you want to group data, choose the 'Group by' fields before moving the other fields.

Current Layout ("FA_List")

- Children
- Concat Address
- Contact Full Name
- Discount Rate
- Family ID
- Family Name
- gList View Text
- gSort By
- Last Swim Date
- Mark
- Telephone default

Group by: (Unsorted)

Field export order

- Family ID
- Family Name
- Address 1
- Address 2
- Address 3
- Address 4
- Post Code

Options

Output file character set: Unicode (UTF-16)

☐ Apply current layout's data formatting to exported data

Export Cancel

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.

Current Layout ("FA_List")

Current Table ("FA_Families")

Related Tables

- FA_BO_Bookings
- FA_BO_Bookings on ID Status
- FA_CC_Credit Card
- FA_CU_Custom Fields
- FA_DO_Documents
- FA_DT_Document Templates on Subject
- FA_FA_Families Marked
- FA_FA_Families ReferralFamily

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.

Family Data.xlsx - Microsoft Excel non-commercial use

	A	B	C	D	E	F	G	H	I	J
	Family ID	Family Name	Address 1	Address 2	Address 3	Address 4	Post Code	Email	Telephone default	Contact
1		2 Smith	6A Eriestoke Crescent	Tawa	Churton Park	Wellington		4001 barbara@computerize.co.nz	0272222082	Barbara
2		9 Smith	89 Roberta Road	Tawa		Wellington		4008 computerize@xtra.co.nz	0272222082	Daniel
3		10 Brown	345 Nowhere St	Brooklyn		Wellington		4009 computerize@xtra.co.nz	0272222082	Sam
4		11 Anderson	876 Somewhere Rd	Tawa		Wellington		4010 computerize@xtra.co.nz	0272222082	David
5		14 Zimmerman	786 another road	Porirua		Wellington		4008 computerize@xtra.co.nz	0272222082	Andy
6		15 Thomson	25 Churton Drive	Churton Park		Wellington		4001 computerize@xtra.co.nz	0272222082	Anthony
7		16 King	46 Brooklyn Rd	Brooklyn		Wellington		4008 computerize@xtra.co.nz	0272222082	Nathan
8		17 White	76 Moorefield Road	Johnsonville		Wellington		4001 computerize@xtra.co.nz	0272222082	Julie
9		18 Fairbrother	56 Watt St	Tatari Bay		Wellington		4012 computerize@xtra.co.nz	0272222082	Mark
10		19 Hughson	98 Barrett St	Ngao		Wellington		4007 computerize@xtra.co.nz	0272222082	Ngairi
11		20 McDougal	118 South St	Newlands		Wellington		4006 computerize@xtra.co.nz	0272222082	Mary

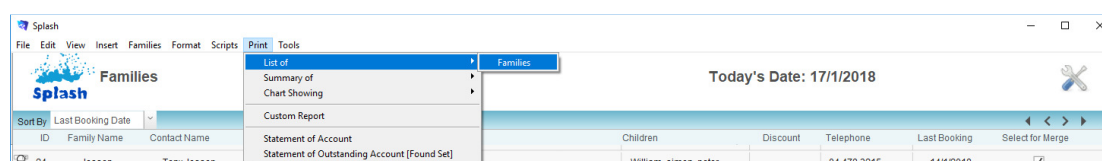
Printing Family Reports

You must be in the Families module of Splash to generate the following reports. All reports are accessed from the Print menu.

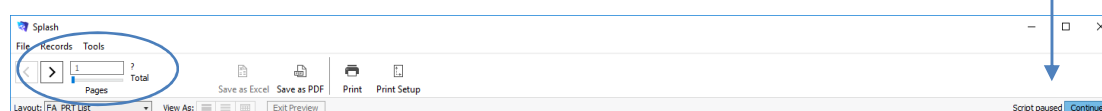
Printing a List of Families

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

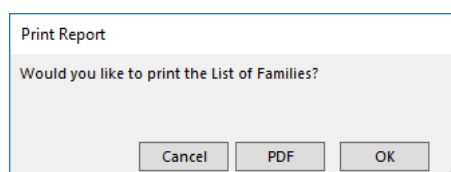
1. Use the **Finding a Family** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Families** from the pop-out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



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



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



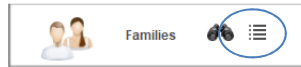
6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

List of Families				Students
Family Name and Contact				
ANDERSON	David	876 Somewhere Rd, Tawa, Wellington 4010	0272222082	3
APLIN	Sylvia	76 High St, Tawa, Wellington 4010	0272222082	3
APOLLO	Martha	78 Youngs Road, Tauranga 7902	0272222082	2
BEAUCHAMP	Russell		0272222082	1
BRADLEY	Patricia	943 Beach Parade, Tauranga 7902	0272222082	1
BROWN	Peter	234 any street, Wellington	0272222082	1
BROWN	Sam	345 Nowhere St, Brooklyn, Wellington 4009	0272222082	4
BUCHANAN	Debbie	29 Victoria St, Khandallah, Wellington 4007	0272222082	2
CRANDLEY	Joanne	123 Any St, Wellington	0272222082	1
FAIRBROTHER	Mark	56 Watt St, Tatahi Bay, Wellington 4012	0272222082	2
HARGREAVES	Susan	24 lane St, Wallaceville, Upper Hutt 5014	0272222082	2
HARPER	Anna	45 Whangaehu Valley Rd, Masterton 5886	0272222082	1
HARPER	Edith	76 Colombo Road, Tawa, Wellington 4010	0272222082	2

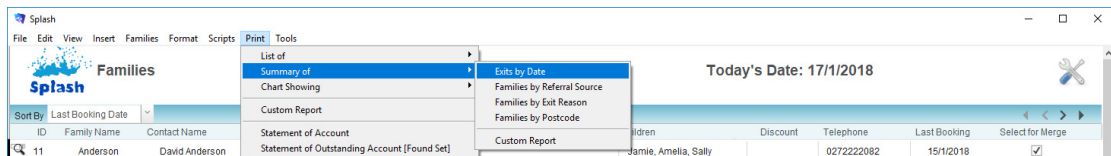
Printing a Summary of Exits by Date

This report counts the number of families and the number of students who have exited the swim school.

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



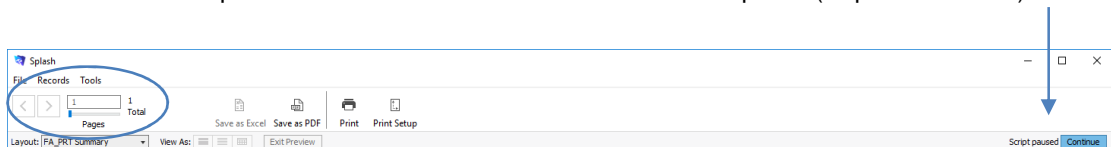
3. The Families List View screen will be displayed.
4. Select **Summary of ...** from the Print menu and select **Exits by Date** from the pop-out menu displayed.



5. The Specify Date for Reporting dialog will be displayed on your screen. Enter the Start Date and End Date for the families to be included in your report.

A screenshot of the 'Specify Dates for Reporting' dialog box. It contains the text 'Please specify the start and end date for the reporting period.' Below this, there are two input fields: 'Start Date' with the value '1/12/17' and 'End Date' with the value '31/12/17'. At the bottom right, there are 'Cancel' and 'OK' buttons.

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



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

A screenshot of the 'Print Report' dialog box. It contains the text 'Would you like to print the Summary of Exits?'. At the bottom, there are three buttons: 'Cancel', 'PDF', and 'OK'.

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

A screenshot of the 'Summary of Families' report. The report is titled 'Summary of Families' and 'Summary of Exits'. It contains a table with three columns: 'Summary of Exits', 'Number of Families', and 'Number of Students'. The data is as follows:

Summary of Exits	Number of Families	Number of Students
Financial	1	3
Goals Met	2	2
Other Commitments	1	4
Poor Service	1	4

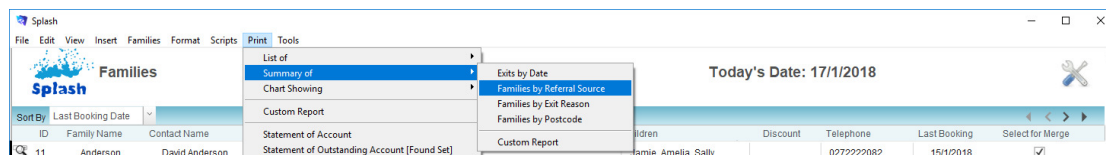
Printing a Summary of Referral Source

This report counts the number of families and the number of students for each source of referral.

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



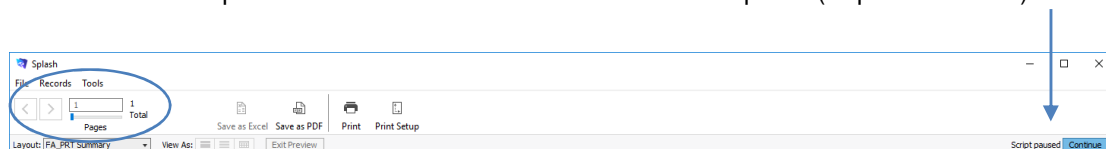
3. The Families List View screen will be displayed.
4. Select **Summary of ...** from the Print menu and select **Families by Referral Source** from the pop-out menu displayed.



5. The Specify Date for Reporting dialog will be displayed on your screen. Enter the Start Date and End Date for the families to be included in your report.

A dialog box titled 'Specify Dates for Reporting'. It contains the text 'Please specify the start and end date for the reporting period.' Below this are two text input fields: 'Start Date' with the value '1/12/17' and 'End Date' with the value '31/12/17'. At the bottom are 'Cancel' and 'OK' buttons.

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



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

A dialog box titled 'Print Report'. It contains the text 'Would you like to print the Summary of Referrals?'. At the bottom are three buttons: 'Cancel', 'PDF', and 'OK'.

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

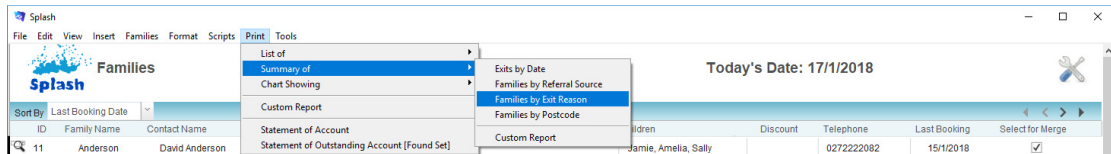
A screenshot of a report titled 'Summary of Families Summary of Referrals'. It shows a table with three columns: 'Number of Families', 'Number of Students', and 'Existing Client'. The data is as follows:

	Number of Families	Number of Students
Existing Client	34	80
School	2	5
Total Reported	1	4
	37	89

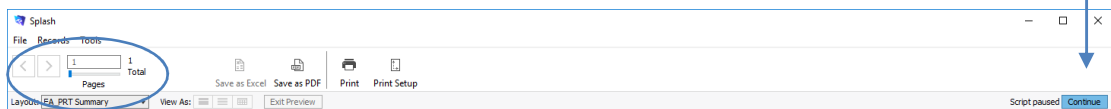
Printing a Summary of Exit Reasons

This report counts the number of families and the number of students who have exited the swim school.

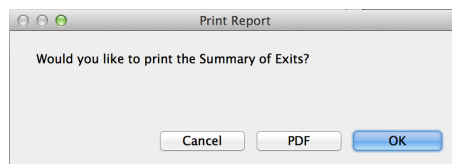
1. Use the **Finding a Family** function to locate the group of exited families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Families by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



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



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



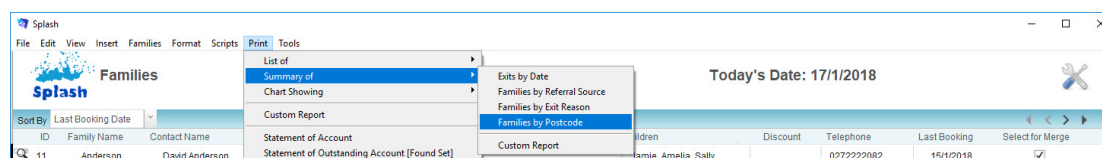
6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Summary of Families		
Summary of Exits		
	Number of Families	Number of Students
Financial	1	3
Goals Met	2	2
Other Commitments	1	4

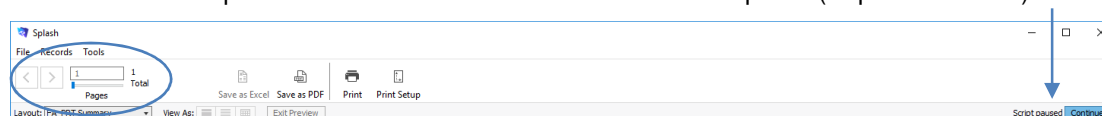
Printing a Summary of Postcodes

This report counts the number of families and the number of students for each postcode.

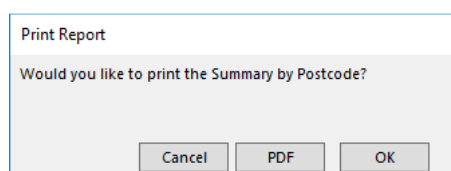
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Families by Postcode**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



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



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



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

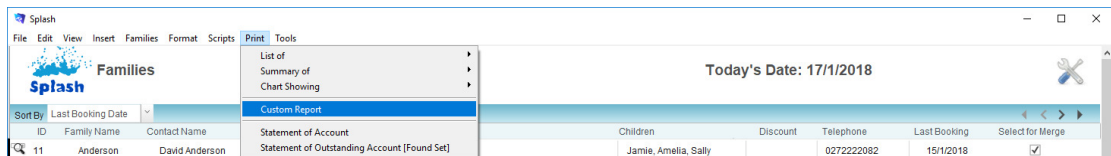
Summary of Families Summary by Postcode		
	Number of Families	Number of Students
PC = :4000	2	2
PC = :4001	4	10
PC = :4002	1	3
PC = :4005	2	6
PC = :4006	1	3
PC = :4007	4	9
PC = :4008	6	16
PC = :4009	1	4
PC = :4010	7	18
PC = :4012	1	2
PC = :5886	1	1
PC = :6007	1	
Total Reported	31	74

Printing a Custom Report

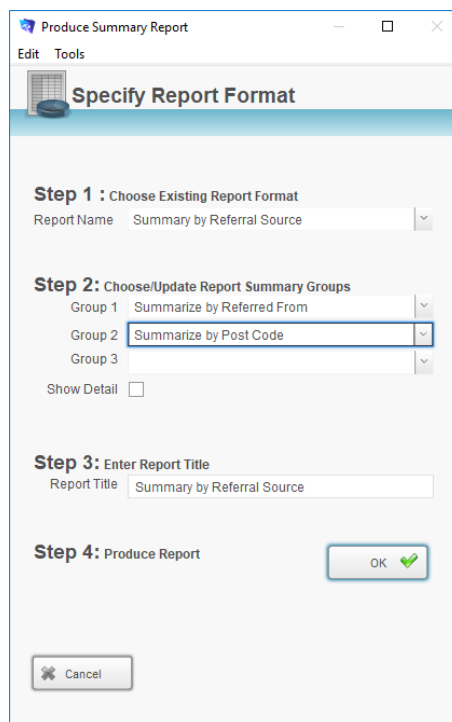
In addition to the generic family reports, Splash provides custom report writing. Custom reports are specific reports layouts where you can change the grouping for summary totals.

Displaying the Custom Report Dialog

1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Custom Report ...** from the Print menu.



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



Defining a Custom Report

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

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

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

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

Step 2: Choose/Update Report Summary Groups

Group 1 Summarize by Referred From

Group 2 Summarize by Post Code

Group 3

Show Detail ☒

Custom Report Sample (No Detail)

The sample report below demonstrates the use of summary levels. Show Detail was left blank when the report was created.

Summary of Families		
Summary by Referral Source		
	Number of Families	Number of Students
Existing Client	3	5
School	1	4
Signage	1	1
Television	1	
Total Reported	6	10

Custom Report Sample (Show Detail)

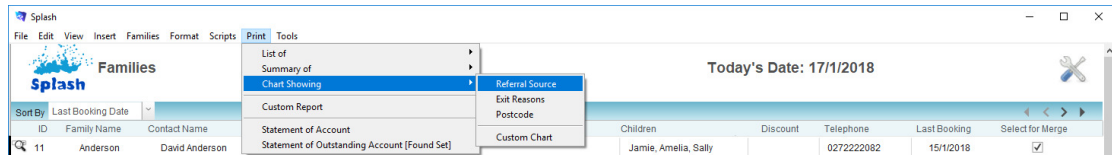
Information in the report below has been grouped by the same categories, however this time **Show Detail** has been selected.

Summary of Families		
Summary by Referral Source		
	Number of Families	Number of Students
Existing Client	3	5
Smith		0272222082
Smith		89 Roberta Road, Tawa 4008 0272222082
Williamson		987 Essex St, Masterton 5886 0272222082
School	1	4
Smith		6A Eriestoke Crescent, Churton Park, Wellington 0272222082
Signage	1	1
Harper		45 Whangaehu Valley Rd, Masterton 5886 0272222082
Television	1	
Smith		1243 Any Street, Wellington 0272222082
Total Reported	6	10

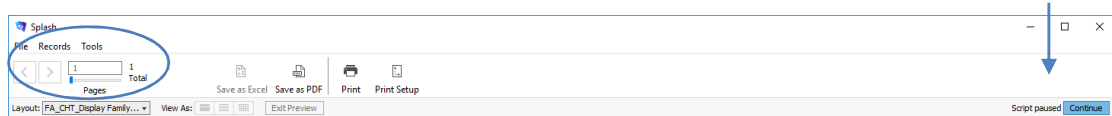
Printing a Chart

Printing a Chart Showing Families by Referral Source

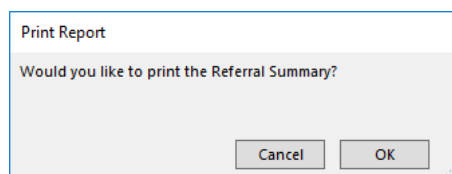
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Referral Source**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



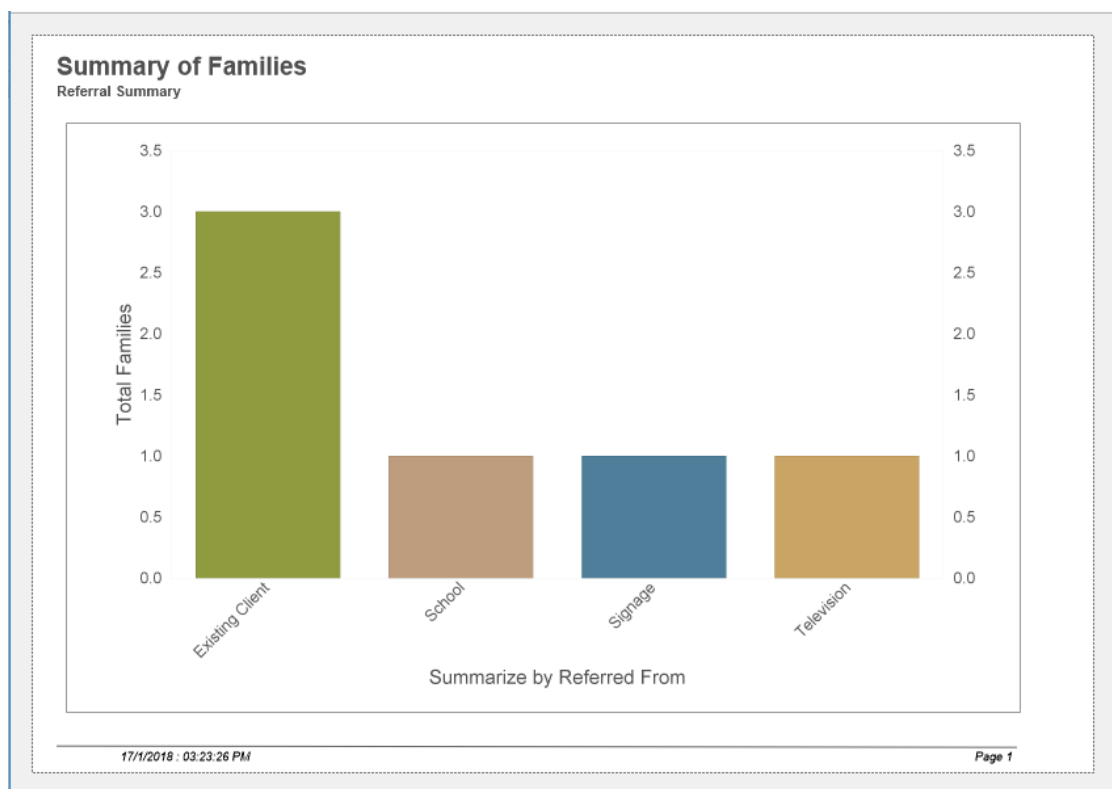
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



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

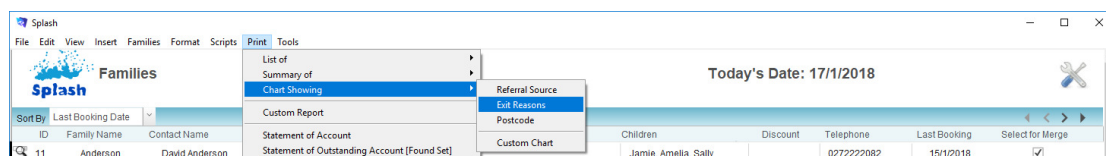


6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

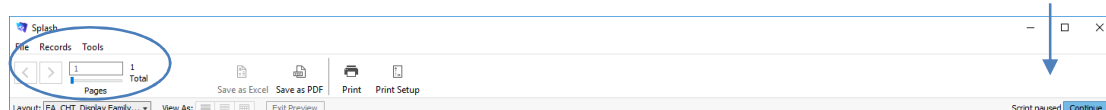


Printing a Chart Showing Families by Exit Reason

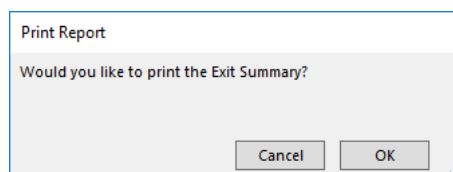
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Exit Reason**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



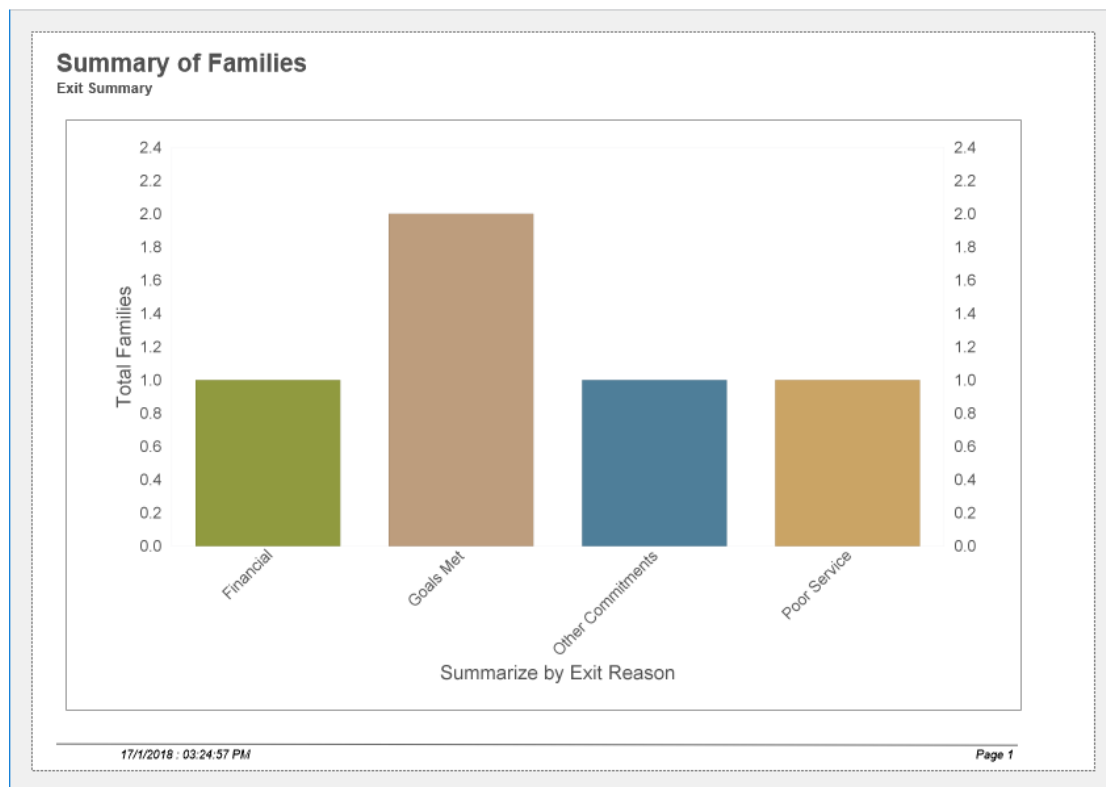
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



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

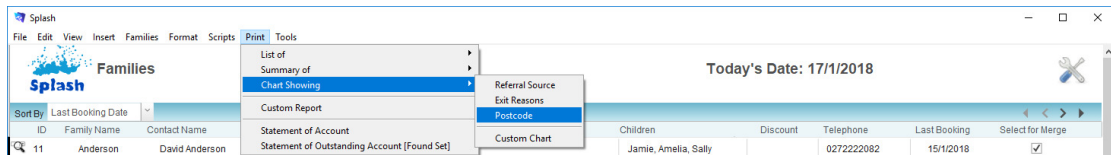


6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

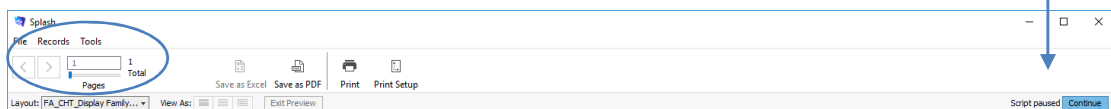


Printing a Chart Showing Families by Postcode

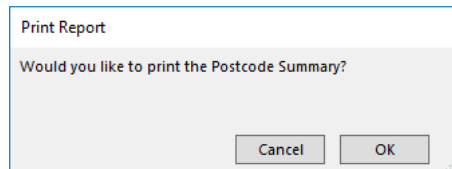
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Postcode** from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



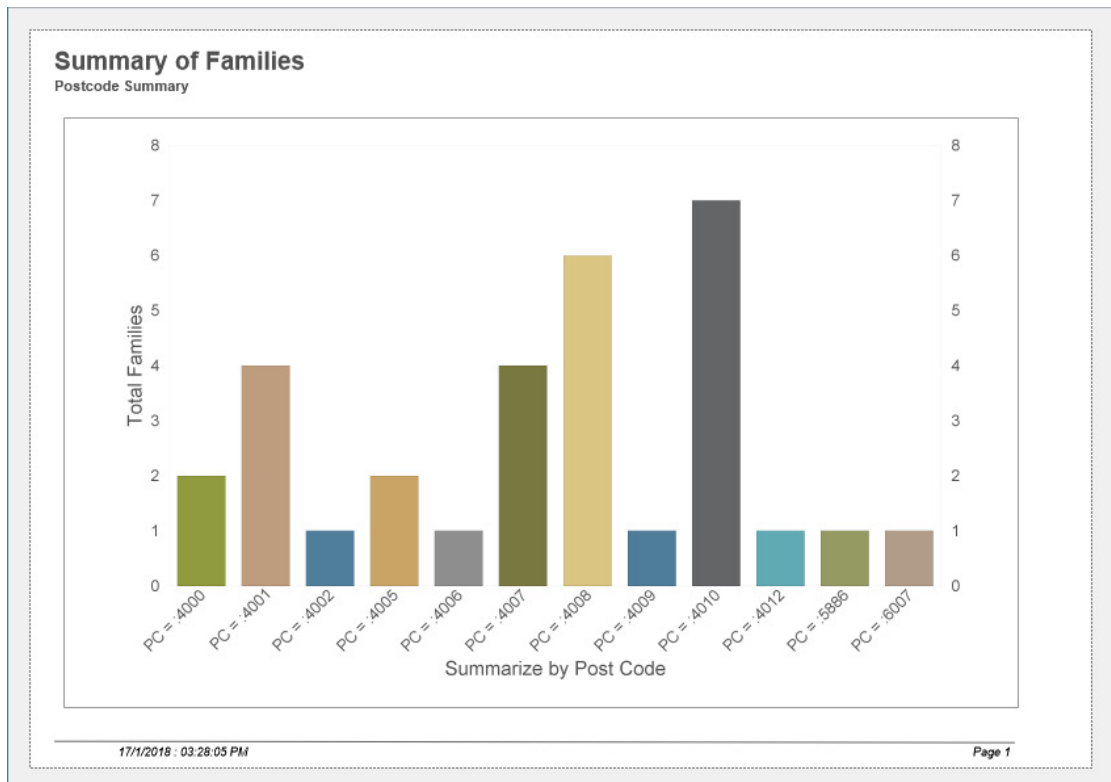
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



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



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



Defining Booking Details

This module contains a record of each permanent or catchup booking. Attached to each booking record is a progress report containing the goals each student is aiming to achieve. Use this module to print a selection of booking related documents and reports e.g. confirmation letters, instructor lists, attendance summaries, assessment lists and student certificates. An automated rollover function enables you to carry all current bookings forward to the subsequent term.

The Booking Record

In the centre of the screen you will see generic student information along with a photograph of the child. Along with student information there are three central tab cards that contain information about the Session, Booking Info, and Primary Contact information.

Each booking record also contains the following three tab cards on the right of the screen:

Attendance and Payments – displays attendance for all dates within the block along with information about how the booking cost was defined. The cost of booking includes the initial cost, less any discount, credits, or free lessons. In addition to these values which reduce the value of a booking; you can also add a late payment fee. All payments made towards the booking will be displayed at the base of the screen.

The screenshot shows the 'Splash Bookings' software interface. The top menu bar includes 'File', 'Edit', 'View', 'Insert', 'Format', 'Bookings', 'Scripts', 'Print', and 'Tools'. The main window is titled 'Bookings' and displays 'Today's Date: 19/1/2018'. On the left, there is a 'Filter By Student Name' section with a dropdown menu set to 'Everyone' and a list of students. The central area shows student information for 'Jacob (Jake) Smith', including a photo, gender (Male), age (5_5m), contact person (Barbara Smith), and telephone (0272222082). To the right, there is a 'DD List' section with tabs for 'Session', 'Contact Person', and 'Booking Info'. The 'Session' tab is active, showing details for 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', and Block 'Jan'. Below this, there is a 'Cost of Booking' section with a table showing 'Initial Cost' of \$61.50, 'Discount Applied' of \$6.15, 'Credit Applied' of \$0.00, 'Value of Free Lessons' of \$0.00, 'Exit Value Written Off' of \$0.00, 'Late Payment Fee' of \$0.00, and 'Payments Received' of \$0.00. The 'Balance Due' is \$55.35. At the bottom, there is a 'Take Payment by Bank Debit' button and a 'Next Payment Due' field.

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 search bar with 'Jacob' entered and a dropdown for '2018'.
- Student List:** A list of students with columns for Name, Class, and Day. '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 a 'Comments' text area and a 'Student Exited' checkbox.
- DD List:** A table showing booking details:

Session	Contact Person	Booking Info
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
- Achievements Table:** A table with columns for Student Level (3), Goal Status, Date Achieved, and Last Goal Achieved. It lists four goals:

Student Level	Goal Status	Date Achieved	Last Goal Achieved
1 Blowing Bubbles Eyes Under			
2 Freestyle kick with board			
3 A torpedo			
4 4 circle arms			
- Payments, Attendance, Comments:** Tabs for additional information.

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.

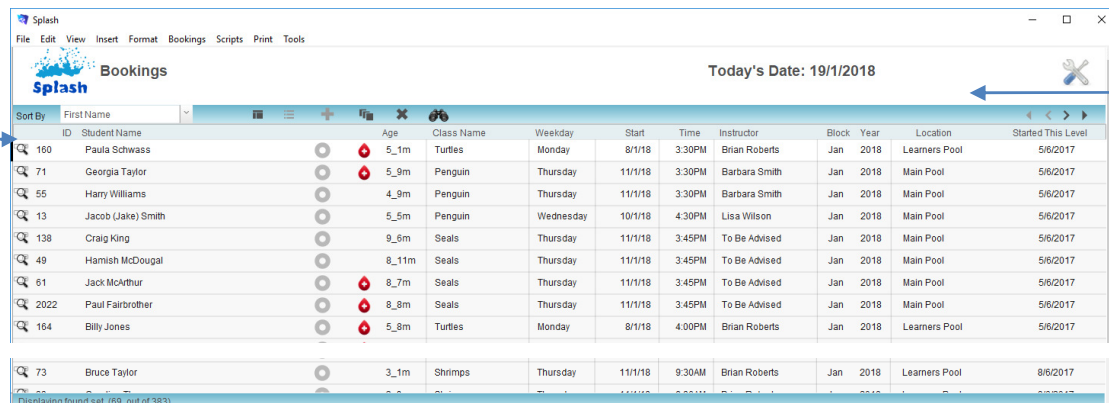
The screenshot shows the 'Comments' tab in the Splash Bookings software. The interface is similar to the 'Achievements' tab but with different data:

- Filter By Student Name:** A search bar with 'Jacob' entered and a dropdown for '2018'.
- Student List:** A list of students with columns for Name, Class, and Day. '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 a 'Comments' text area and a 'Student Exited' checkbox.
- DD List:** A table showing booking details:

Session	Contact Person	Booking Info
Class ID: PEN	Session ID: 3494	
Class Name: Penguin		
Class Level: 3	Student Level: 3	
Programme: Preschool		
Instructor: To Be Advised	No. of Lessons: 4	
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
- Comments Section:** A large text area for 'Comments' and a 'Transfer Notes' section. The 'Transfer Notes' section contains 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

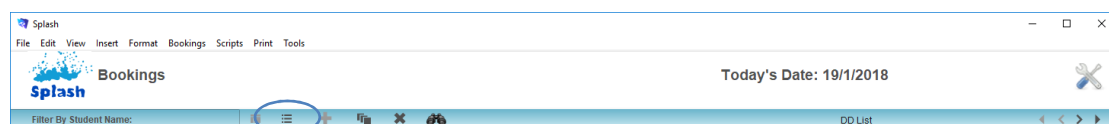
ID	Student Name	Age	Class Name	Weekday	Start	Time	Instructor	Block	Year	Location	Started This Level
160	Paula Schwass	5_1m	Turtles	Monday	8/1/18	3:30PM	Brian Roberts	Jan	2018	Learners Pool	5/6/2017
71	Georgia Taylor	5_9m	Penguin	Thursday	11/1/18	3:30PM	Barbara Smith	Jan	2018	Main Pool	5/6/2017
55	Harry 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.

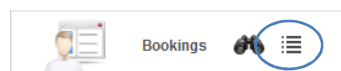
Displaying a List of Bookings

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

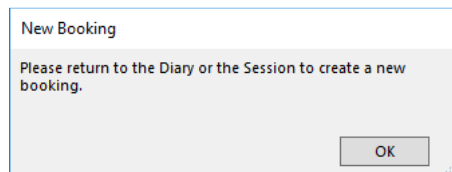


3. The Booking List View screen will be displayed

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.

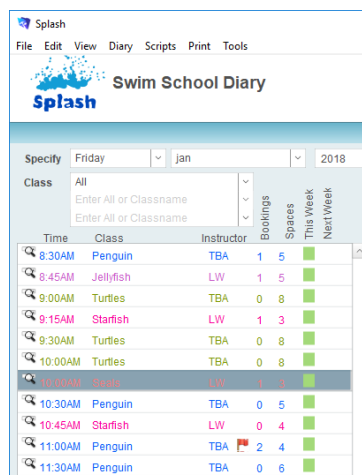
Bookings can only be created from either the Diary or the Session screen. If you attempt to create a booking within the Bookings module the following dialog will be displayed.



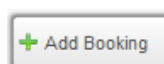
Creating a New Booking in the Diary

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.

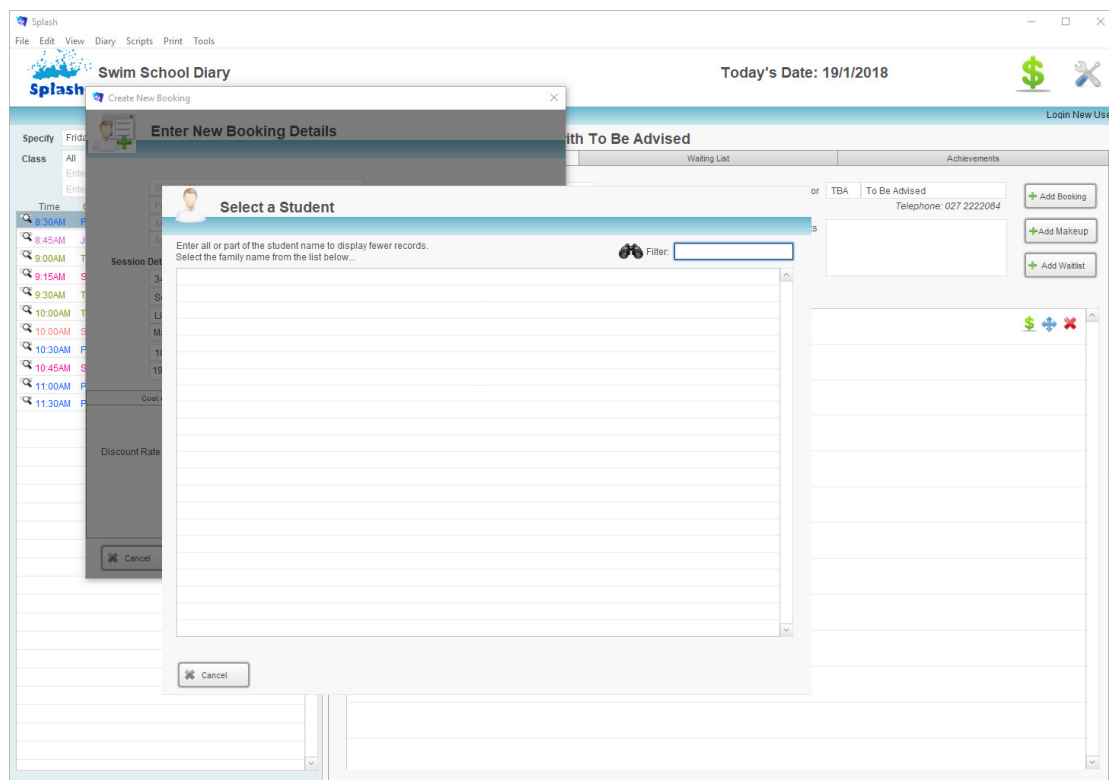
1. Select the required Day, Term and Year at the top of the diary screen to locate the session you wish to book the student in to.
2. Within the left pane, click once on the session you wish to book the student in to.



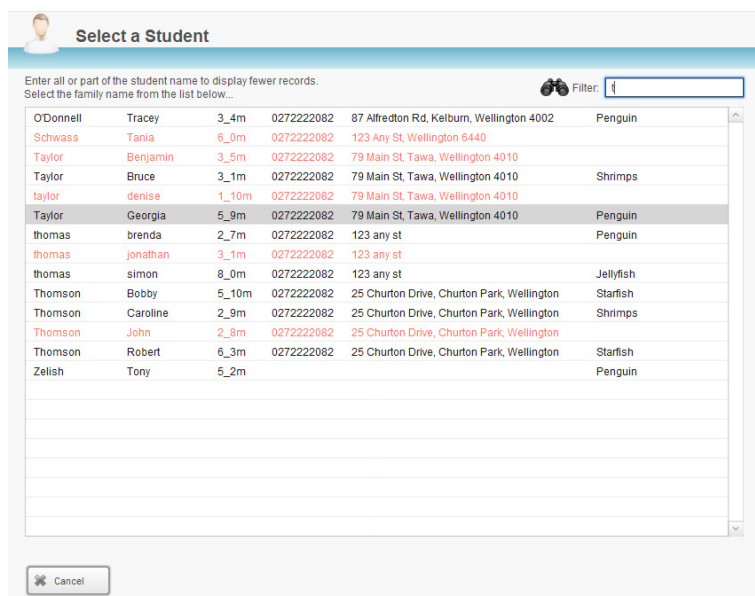
3. Current bookings for the selected session will be displayed on the right of your screen.



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 'Bookings' window in the Splash application. 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'. Below this is a list of students with columns for Name, Class, and Day. 'Jacob (Jake) Smith' is highlighted in blue.
- Student Details:** Fields for Student ID (13), Name (Jacob (Jake) Smith), Gender (Male), Age (5_5m), Medical, Contact (Barbara Smith), and Telephone (0272222082). There is a 'Comments' text area and a 'Student Exited' checkbox.
- DD List:** A table with columns for Session, Contact Person, and Booking Info. It shows details for 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, and Makeup No.
- Payments, Attendance, Achievements, and Comments:** A section with tabs for these categories. The 'Attendance' tab is active, showing a table with columns for Student, Date, and Attendance. The 'Payments' tab shows a table with columns for Cost Method, Cost Per Session, Cost Unit, Initial Cost, Discount Rate, Type, Discount Applied, Credit Applied, Value of Free Lessons, Exit Value Written Off, Late Payment Fee, Payments Received, Balance Due, and Next Payment Due.

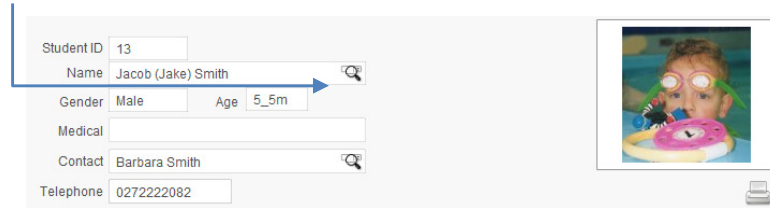
Navigating to the Student Details

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

This close-up view shows the 'Student Details' section. 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

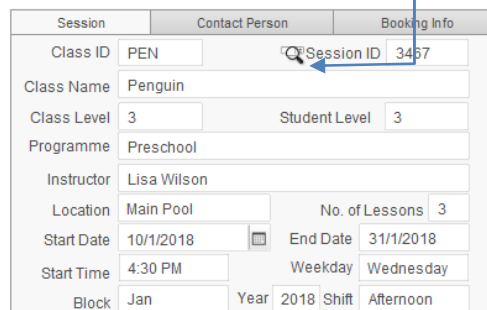


Student ID: 13
Name: Jacob (Jake) Smith
Gender: Male Age: 5_5m
Medical:
Contact: Barbara Smith
Telephone: 0272222082

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.

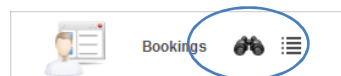
Transfer the Child to Another Session

Hold down the SHIFT key while you click the magnifier to the left of the Session ID

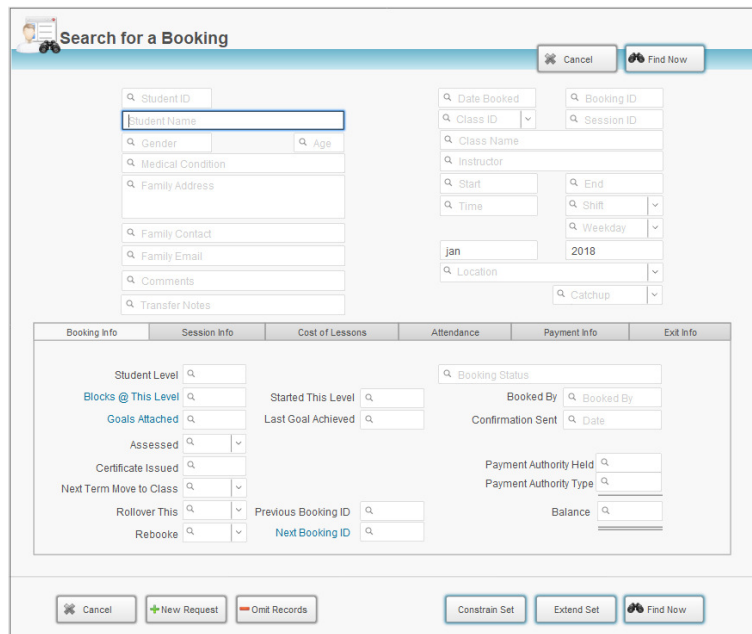
Session		Contact Person		Booking Info	
Class ID	PEN			Session ID	3467
Class Name	Penguin				
Class Level	3	Student Level	3		
Programme	Preschool				
Instructor	Lisa Wilson				
Location	Main Pool	No. of Lessons	3		
Start Date	10/1/2018	End Date	31/1/2018		
Start Time	4:30 PM	Weekday	Wednesday		
Block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

Finding a Booking

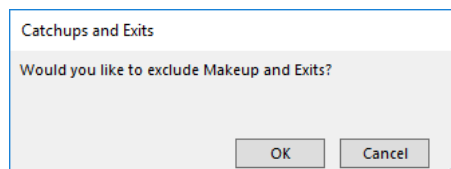
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking Find** icon



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



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.



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

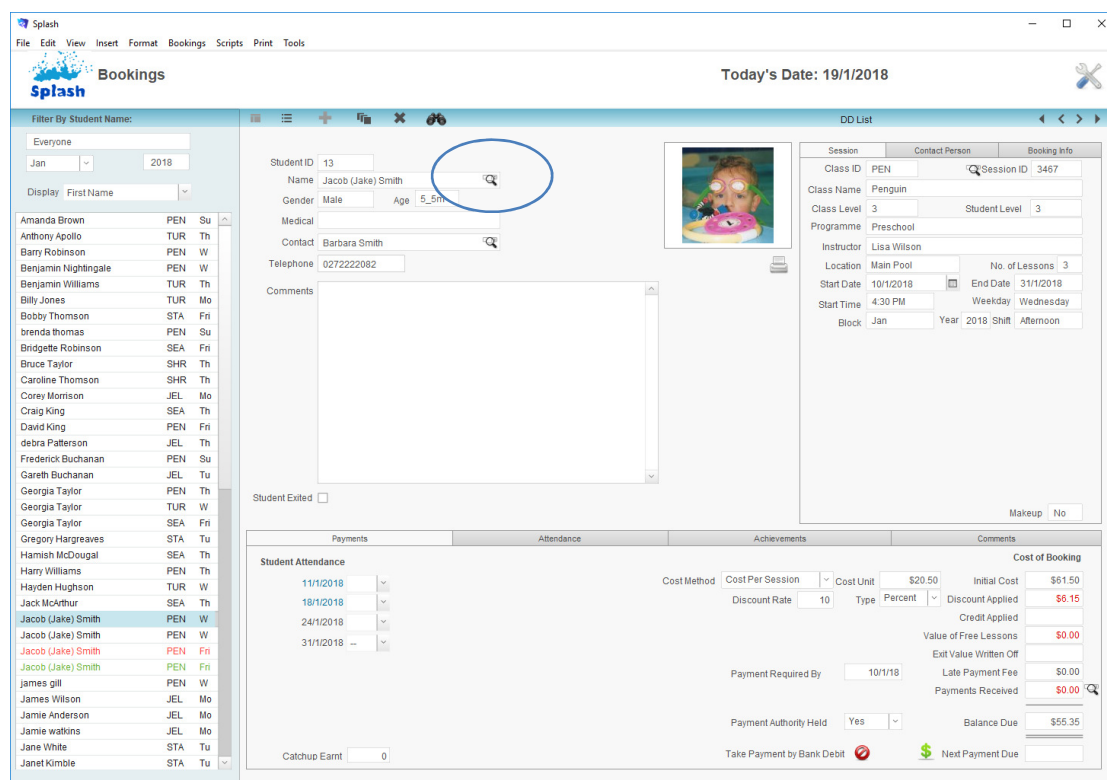
ID	Student Name	Age	Class Name	Weekday	Start	Time	Instructor	Block	Year	Location	Started This Level
160	Paula Schwass	5_1m	Turtles	Monday	8/1/18	3:30PM	Brian Roberts	Jan	2018	Learners Pool	5/6/2017
71	Georgia Taylor	5_9m	Penguin	Thursday	11/1/18	3:30PM	Barbara Smith	Jan	2018	Main Pool	5/6/2017
55	Harry 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.

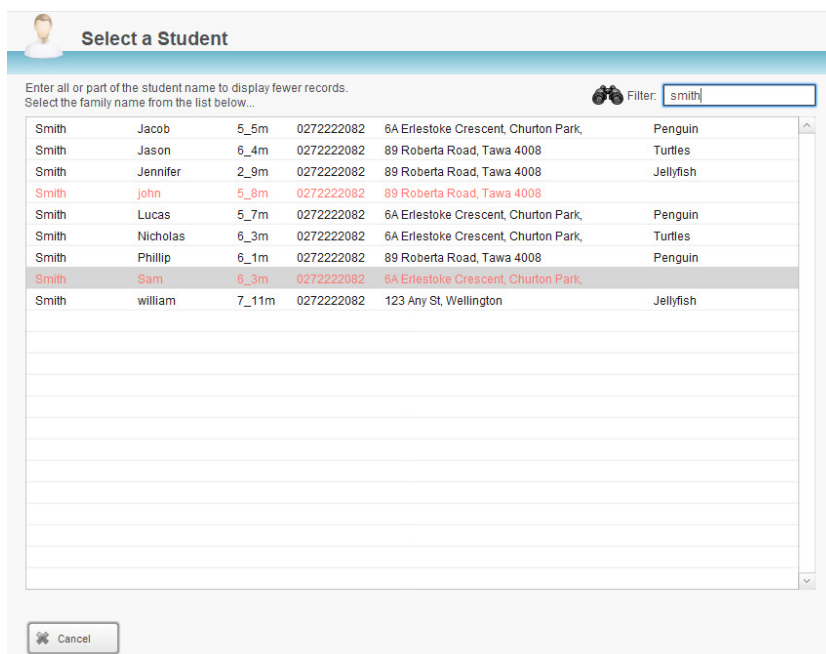
Transfer the Booking To Another Student

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.



4. Your cursor will be placed in the filter field; begin typing the student first name or last name. As you type list of all students matching the name entered will be displayed on your screen.

- To select a student for your booking, simply click once on the student's name, age, or address.

The screenshot shows the 'Splash Bookings' application window. The top menu bar includes File, Edit, View, Insert, Format, Bookings, Scripts, Print, and Tools. The title bar says 'Splash Bookings'. 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 table of students:

Display	First Name	DOL	Su
sam Jones			
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 large text area for Comments.
- Session/Booking Info:** A tabbed section showing Session (Class ID: PEN, Class Name: Penguin, Class Level: 3, Programme: Preschool, Instructor: Lisa Wilson, Location: Main Pool, Start Date: 10/1/2018, Start Time: 4:30 PM, Block: Jan), Contact Person, and Booking Info (Session ID: 3457, Student Level: 3, No. of Lessons: 3, End Date: 31/1/2018, Weekday: Wednesday, Year: 2018, Shift: Afternoon).
- Cost of Booking:** A section with various cost-related fields:

Cost Method	Cost Per Session	Cost Unit	Initial Cost
Discount Rate	10	Type Percent	\$61.50
			\$6.15
			\$0.00
			\$0.00
			\$0.00
			\$0.00
			\$0.00
			\$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 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.

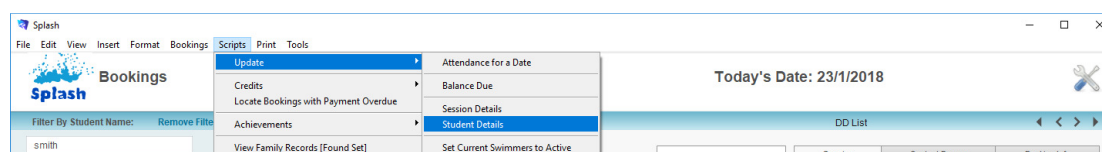
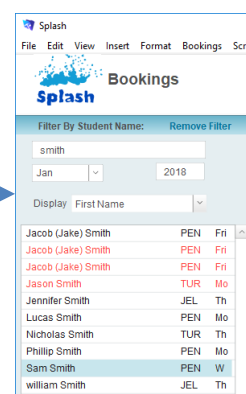
Student details can be updated for a single student or for all students in the found set.

Updating Student Details for the Current Record

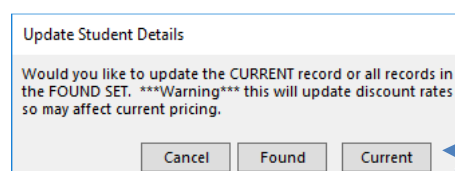
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



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**.



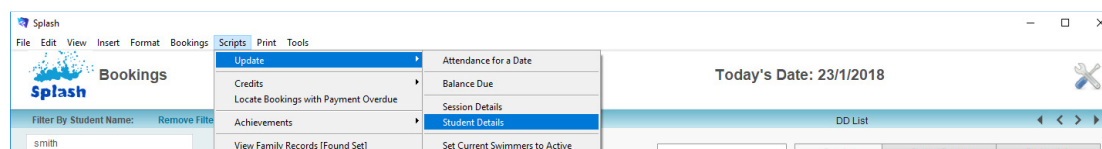
7. The Update Student Details dialog will be displayed on your screen. Click once on the **Current** button.



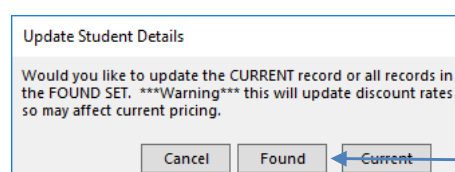
NB: Hold down the CONTROL key while you click the student icon to update a single record.

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.



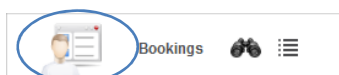
Updating Session Details

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.

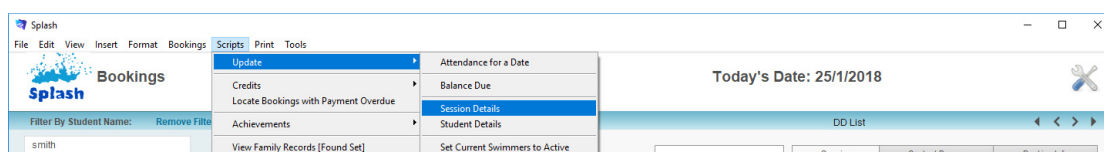
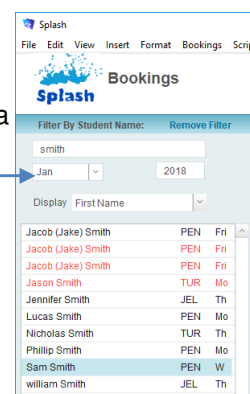
Class details can be updated for a single session or for all sessions in the found set.

Updating Session Details for the Current Record

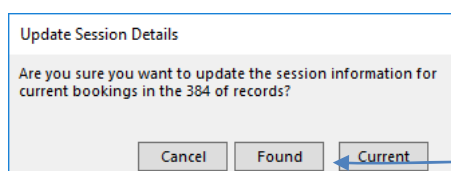
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



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**.

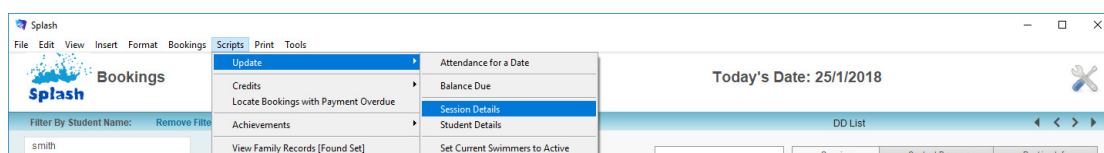


7. The Update Session Details dialog will be displayed on your screen. Click once on the **Found** button.

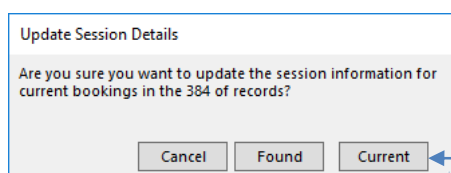


Updating Session Details for the Found Set

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, 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 information, and a photo. On the right, there's a 'DD List' section showing session details like Class ID, Class Name (Penguin), Class Level (3), and Start Date. At the bottom, the 'Achievements' tab is active, showing a list of goals for Student Level 3, such as 'Blowing Bubbles Eyes Under', 'Freestyle kick with board', 'A torpedo', and '4 circle arms'. Each goal has a 'Goal Status' dropdown and a 'Date Achieved' field.

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 is an annotated version of the 'Achievements' tab from the previous screenshot. Blue arrows point to specific elements: one arrow points to the 'Student Level' dropdown menu (currently set to 3), and another arrow points to the 'Add Achievements' button (a green plus sign) located at the bottom left of the goals list.

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.

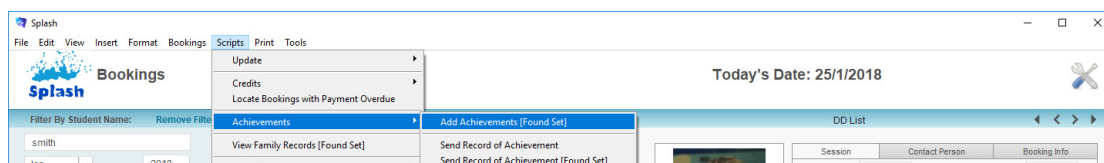
Importing Achievements for the Found Set of Bookings

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).

The screenshot shows the 'Search for a Booking' interface. It has a top bar with 'Cancel' and 'Find Now' buttons. Below are search filters for 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, Location, and Catchup. At the bottom, there are buttons for 'Cancel', 'New Request', 'Omit Records', 'Constrain Set', 'Extend Set', and 'Find Now'.

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 26/1/2018

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

2 Freestyle kick with board Goal Status Date Achieved

3 A torpedo Goal Status Date Achieved

4 4 circle arms Goal Status Date Achieved

Assessed Certificate Issued Rollover This Booking Rebooked Next Block 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

2 Freestyle kick with board Goal Status Date Achieved

3 A torpedo Goal Status Date Achieved

4 4 circle arms Goal Status Date Achieved

Assessed Certificate Issued Rollover This Booking Rebooked Next Block 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: X
2	Freestyle Kick with board	Progress / Comments	Goal Status	Date Achieved	X
3	A torpedo	Progress / Comments	Goal Status	Date Achieved	X
4	circle arms	Progress / Comments	Goal Status	Date Achieved	X

Assessed: Certificate Issued: ☐ Rollover This Booking: Yes ☐ Rebooked Next Block: 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 list of students. The main area displays details for Jacob (Jake) Smith, including his photo, contact information, and a list of goals. The 'Goals' tab is active at the bottom. A blue arrow points from the printer icon 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 includes navigation buttons, page numbers (1 of 1), and options to 'Save as Excel', 'Save as PDF', 'Print', or 'Print Setup'. A blue arrow points from the 'Continue' button at the bottom right 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

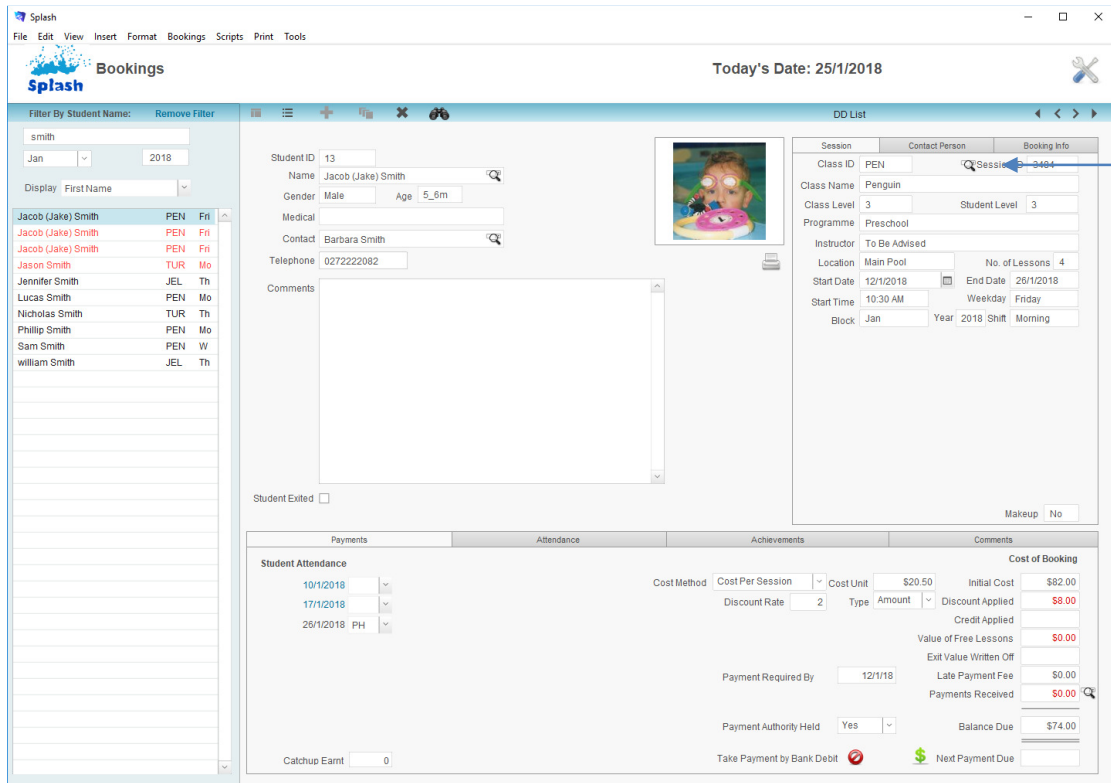
3 A torpedo

4 4 circle arms

5 Back Kick

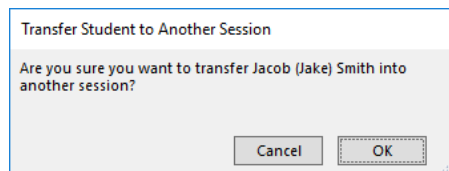
Transferring a Student to Another Session

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

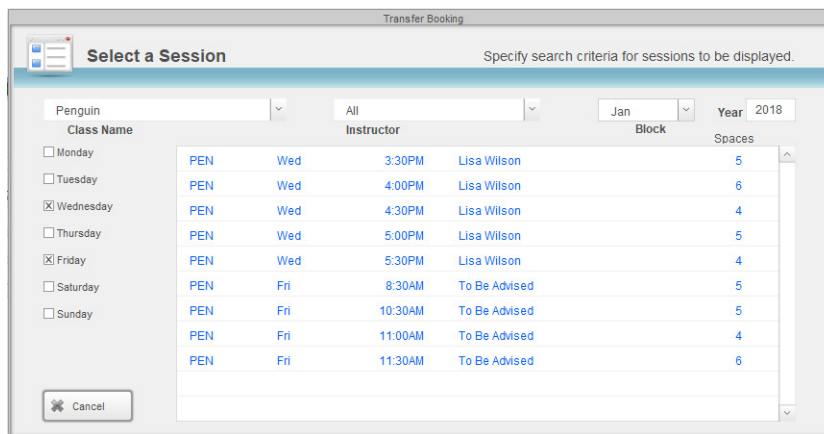


The screenshot shows the 'Splash' software interface. On the left, there's a sidebar with a search filter set to 'smith' and a list of students. The main area displays details for 'Jacob (Jake) Smith', including his ID, name, gender, age, medical history, contact information, and a photo. On the right, there's a 'DD List' panel with tabs for 'Session', 'Contact Person', and 'Booking Info'. The 'Session' tab is selected, showing details for a 'Penguin' class, level 3, at the 'Main Pool'. A blue line points from the 'Session' icon in the top right of the main area to the 'Session' tab in the right-hand panel.

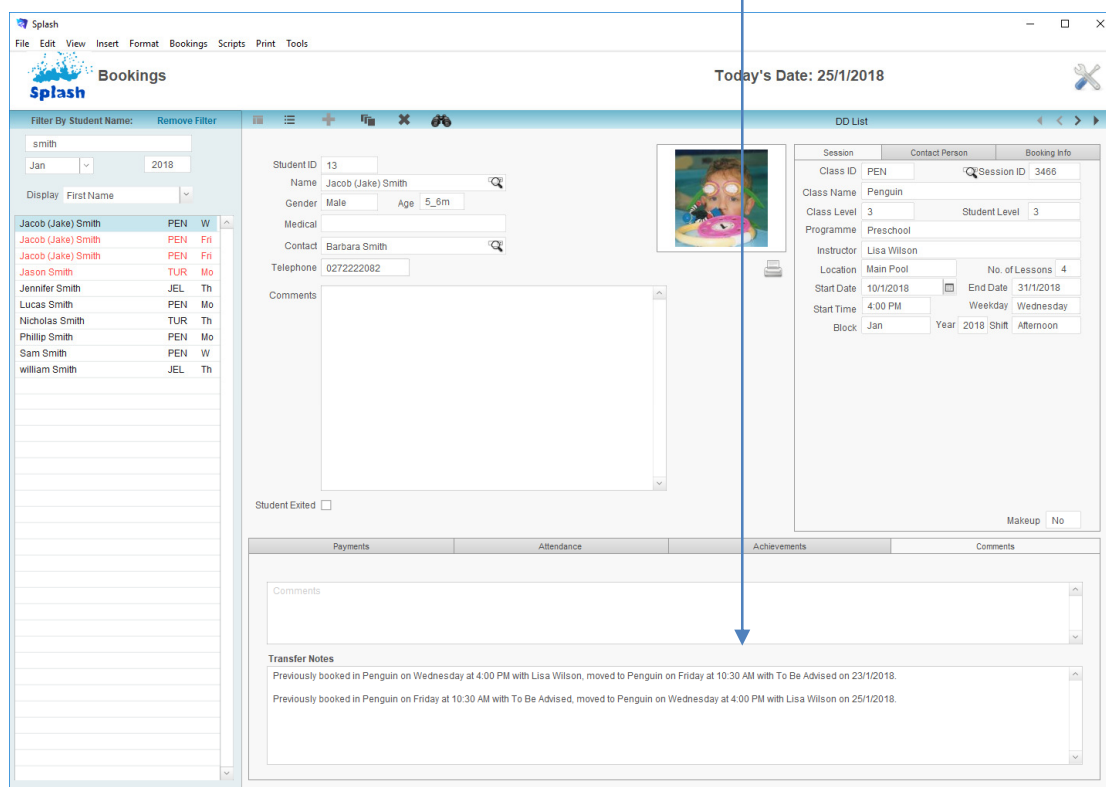
2. Hold down the **SHIFT** key on your keyboard and click once on the Session icon.
3. You will be asked to confirm whether you wish to transfer the child to another session.



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.



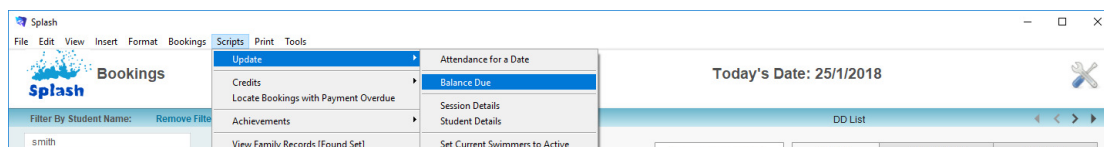
6. A list of all sessions matching the criteria you have entered will be displayed on your screen.
7. Click once on the line, which contains the session you wish to move the student into.
NB: Place your cursor over the desired line (without clicking) to view a list of students currently booked into the 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.

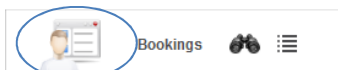


3. Splash will step through all of the records in the found set. It will calculate payments received and update the balance due on all bookings in the found set.

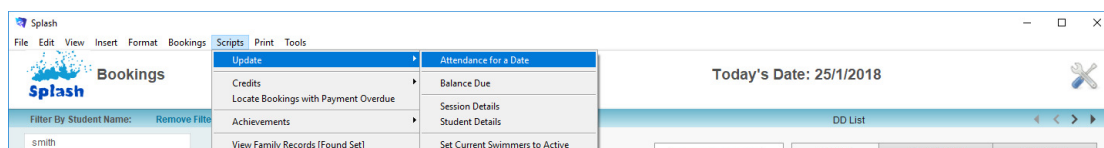
Updating Attendance for Multiple Bookings

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. It contains the following text and fields:

Locate Bookings to Update

Please specify the details below to locate bookings to update.

Weekday
Wednesday

Term
Jan

Year
2018

Cancel OK

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

Attendance Value (A C NA P PH)

- Click OK to update the selected records.

The screenshot shows the 'Splash Bookings' application interface. The 'Attendance' tab is selected, and the 'Student Attendance' table is visible. The table shows the following data:

Date	Attendance Code	Catchup Earned
10/1/2018	P	
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.

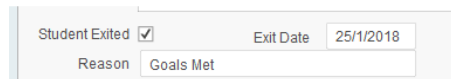
1. Use the **Finding a Booking** function to locate the record you wish to update.
2. Click on the **Student Exited** field to display the exit dialog for the required student.

The screenshot shows the 'Splash Bookings' software interface. On the left, there's a 'Filter By Student Name' section with a search bar and a list of students. The main area displays student details for 'Jacob (Jake) Smith', including name, gender, age, contact information, and a photo. A 'DD List' on the right shows session details like 'Class ID', 'Class Name', 'Instructor', and 'Start Date'. Overlaid on this is the 'Exit Booking' dialog box, which prompts the user to 'Enter Exit Reason' and provides fields for 'Name', 'Reason for Exit', and 'Exit Date'. The dialog has 'Cancel' and 'Done' buttons.

3. Update the **Reason for Exit** and confirm the **Exit Date** fields then click the **Continue** button. A booking is not considered exited unless a reason has been entered.

This is a close-up of the 'Enter Exit Reason' dropdown menu from the 'Exit Booking' dialog. The menu lists various reasons for exit, with 'Goals Met' currently selected and highlighted in blue. The reasons listed are: Family Relocating, Financial, Goals Met, 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.

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.



Student Exited	<input checked="" type="checkbox"/>	Exit Date	25/1/2018
Reason	Goals Met		

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

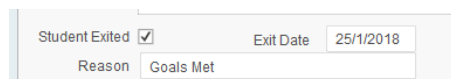
NB: An exited booking is not included in the rollover; the rollover booking field will be set to No.

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.

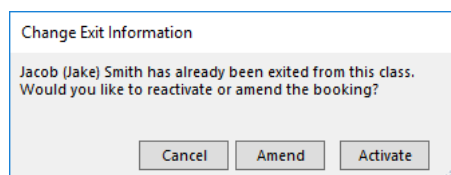
Reactivating an Exited Booking

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.



Student Exited	<input checked="" type="checkbox"/>	Exit Date	25/1/2018
Reason	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.



Change Exit Information

Jacob (Jake) Smith has already been exited from this class.
Would you like to reactivate or amend the booking?

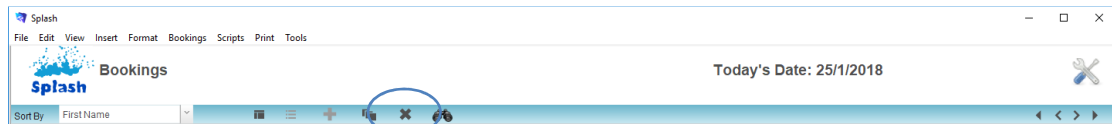
NB: Any funds written off during the exit process will be reapplied to the booking. The rollover booking field will be reset to match the student default.

Deleting a Booking Record

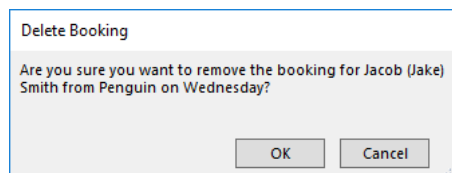
Booking records can be deleted from the Booking details screen, the Booking list view or the diary.

Deleting a Booking from List View

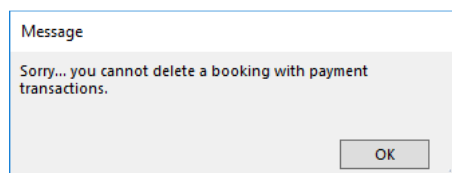
1. Ensure the appropriate Booking record is displayed within the list on your screen.



2. Click once on the row containing the booking you wish to delete.
3. Click once on the **Delete Booking** button.
4. You will be asked to confirm you wish to delete the selected booking.

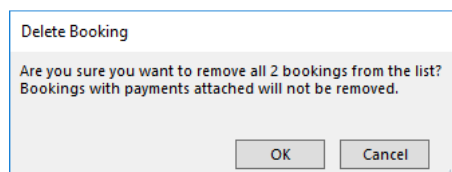


NB: You cannot delete a booking which has received payments.

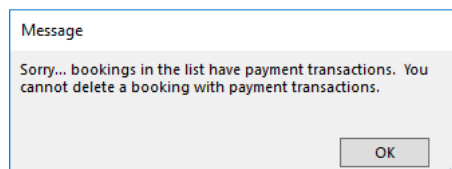


Deleting a Group of Bookings

1. Use the **Find Booking** button to locate the booking records you wish to delete.
2. A list of bookings will be displayed on your screen.
3. Select **Delete All Found Bookings** from the Bookings menu.
4. You will be asked to confirm you wish to delete the selected bookings.



NB: You cannot delete the found set of bookings if the current selection contains ANY bookings with payments attached.

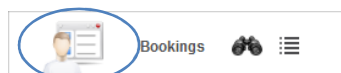


Defining Current Term Swimmers as Active

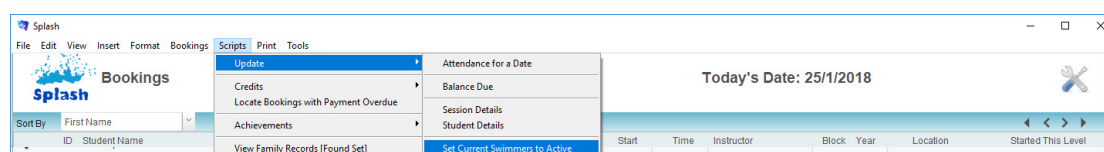
All student and family files can be defined as either active or inactive. During normal operation Splash will attempt to maintain the status of each record and will automatically set the status to Active whenever a booking is made. Splash however has difficulty changing the status of a record to inactive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

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

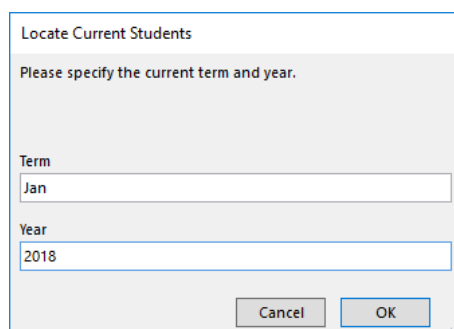
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



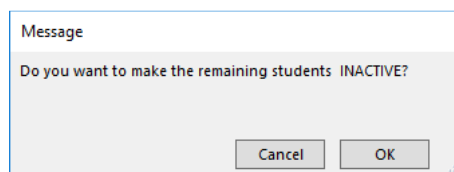
3. Select **Update...Set Current Term Swimmers to Active** from the Scripts menu.



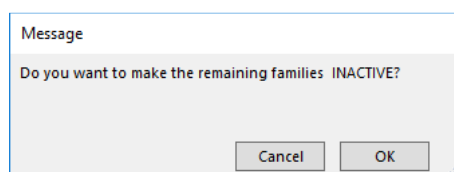
4. The **Locate Current Students** dialog will be displayed on your screen.
5. Enter the current Term and Year and click OK. Students with a booking in the selected term and year will be set to active.

A screenshot of the 'Locate Current Students' dialog box. It contains a text prompt '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.

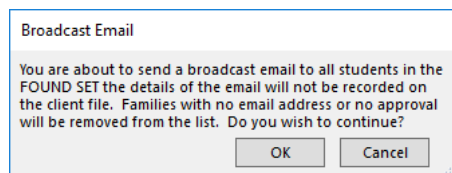
A screenshot of a 'Message' dialog box. It contains the text 'Do you want to make the remaining families INACTIVE?'. At the bottom are 'Cancel' and 'OK' buttons.

Sending a Broadcast Email

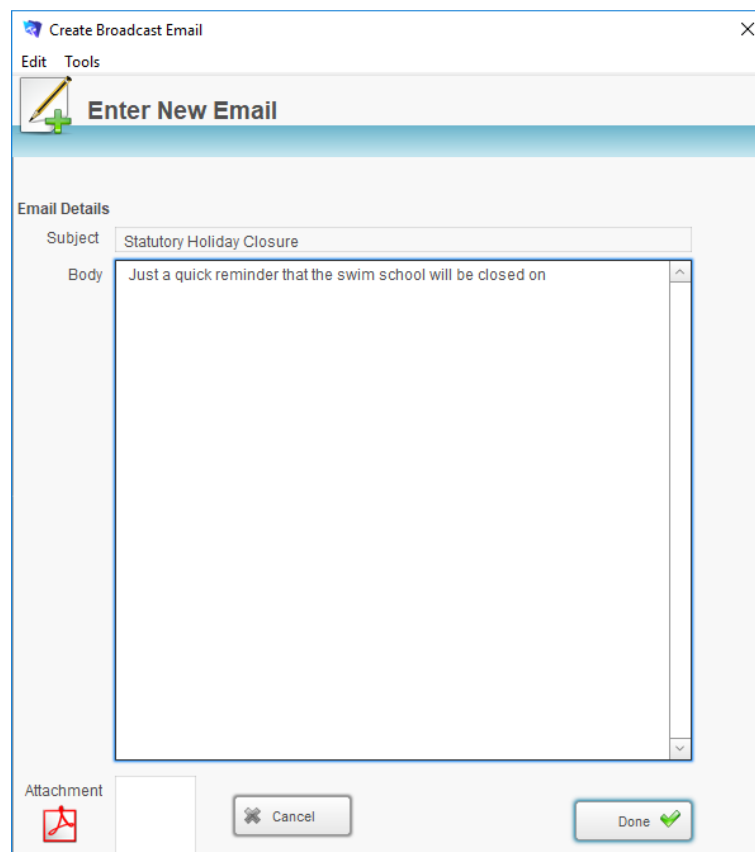
A broadcast email is a single email sent to multiple addresses. An email sent in this way will not be recorded on the family file.

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.



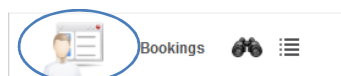
6. Enter the message you wish to send and attach a document if required.
7. Click the **Done** button.
8. The message will be sent as soon as you click Done.

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

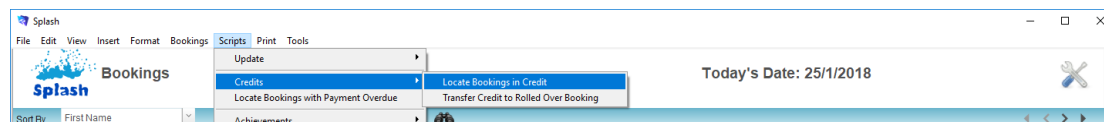
Locate Bookings in Credit

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

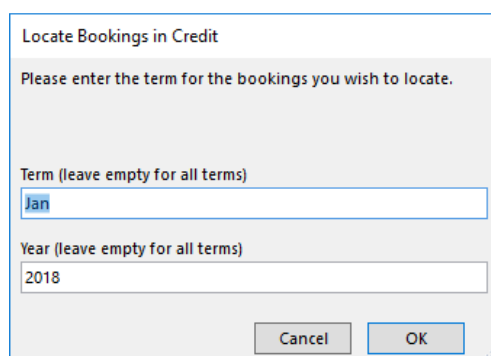
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



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



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



Locate Bookings in Credit

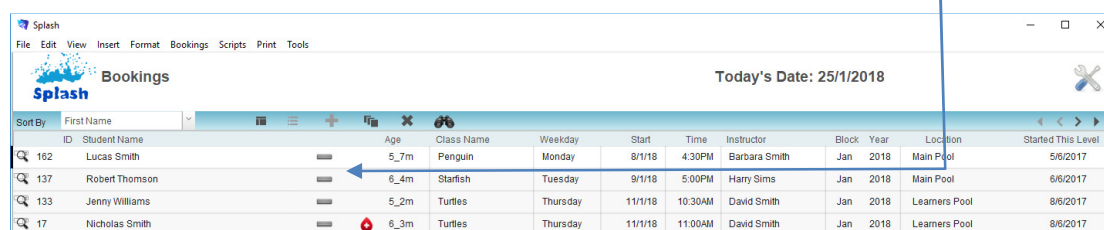
Please enter the term for the bookings you wish to locate.

Term (leave empty for all terms)
Jan

Year (leave empty for all terms)
2018

Cancel OK

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	Leamers Pool	8/6/2017
17	Nicholas Smith	6_3m	Turtles	Thursday	11/1/18	11:00AM	David Smith	Jan	2018	Leamers Pool	8/6/2017

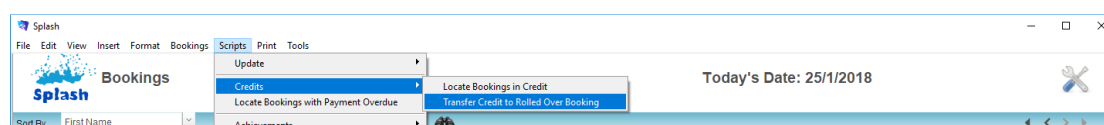
Transfer Credits to Rolled Over Bookings

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

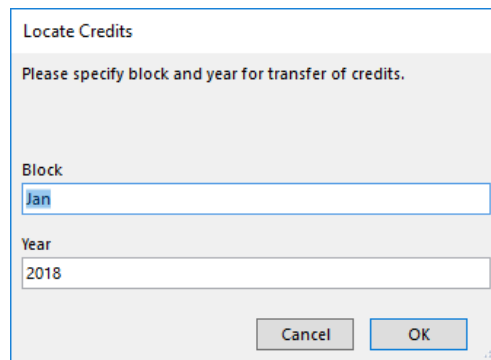
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



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

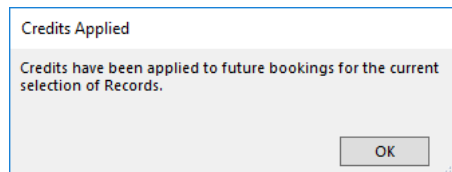
Year

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. The first is labeled "Block" and contains the text "Jan". The second is labeled "Year" and 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

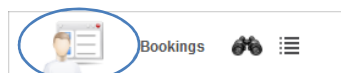
Credits have been applied to future bookings for the current selection of Records.

OK

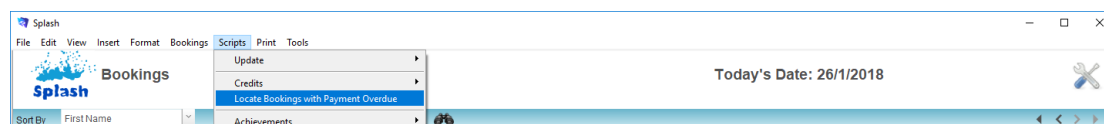
This dialog box is titled "Credits Applied". It contains a message "Credits have been applied to future bookings for the current selection of Records." At the bottom right of the dialog is a single button labeled "OK".

Locate Bookings with Payment Overdue

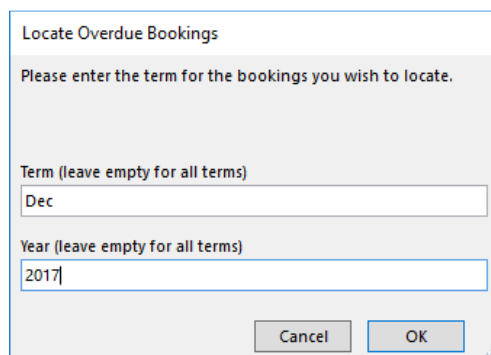
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



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 a text input field for 'Term (leave empty for all terms)' with 'Dec' entered, and another text input field for 'Year (leave empty for all terms)' with '2017' entered. There are 'Cancel' and 'OK' buttons at the bottom right.

Locate Overdue Bookings

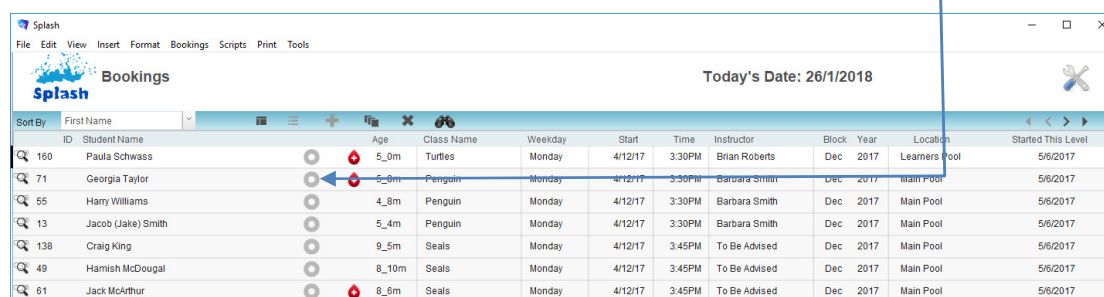
Please enter the term for the bookings you wish to locate.

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 application window showing a list of bookings. The 'Bookings' menu is open. The list displays columns for ID, Student Name, Age, Class Name, Weekday, Start, Time, Instructor, Block, Year, Location, and Started This Level. A blue arrow points to the 'Payment Status' column, which shows a red circle icon for unpaid bookings and a red cross icon for part-paid bookings.

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	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 McDougall	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.

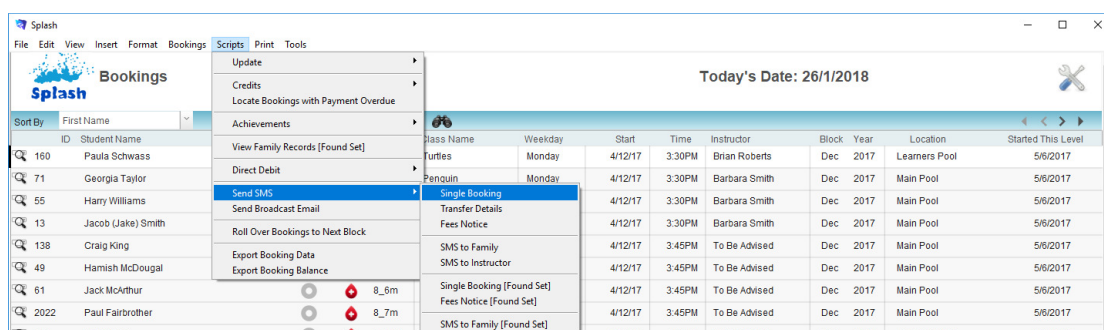
All of the Send SMS commands described below are available on either the Print or the Scripts menu.

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.

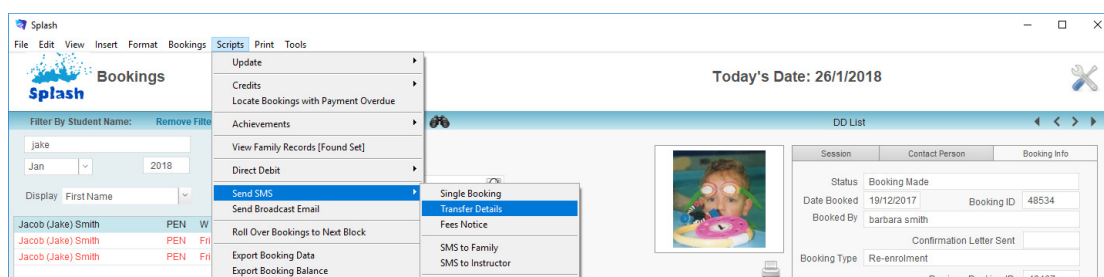


4. The Booking SMS will be generated and sent, a copy will be placed on the clients file.

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.



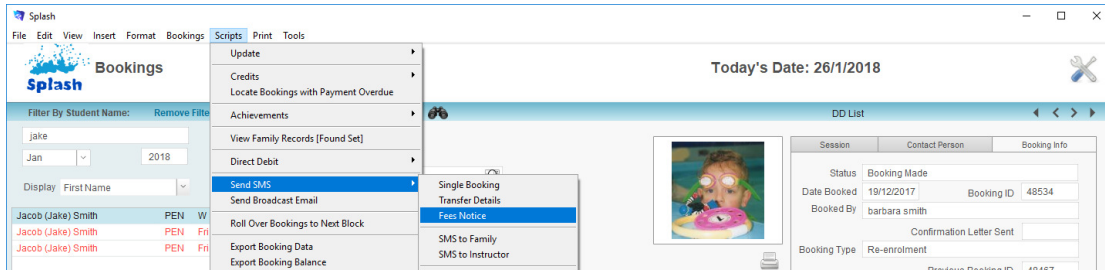
3. The Transfer SMS will be generated and sent, a copy will be placed on the clients file.

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.

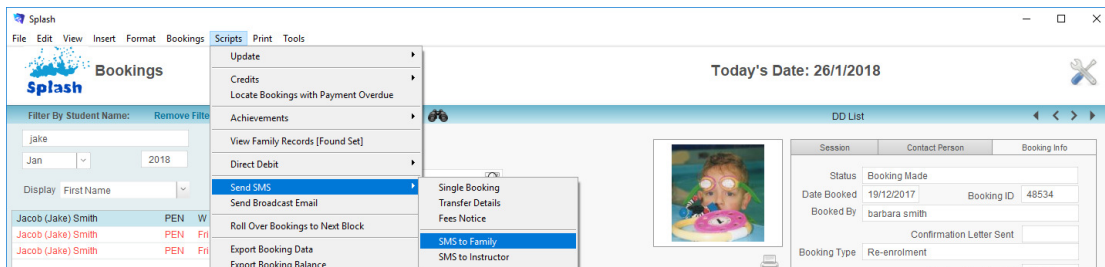


3. The Fee Notice SMS will be generated and sent, a copy will be placed on the clients file.

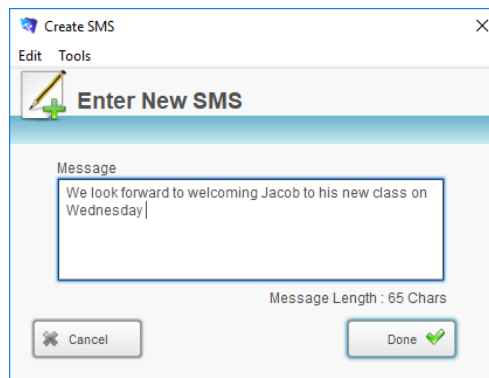
Sending a SMS to the Family (from Menu)

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.



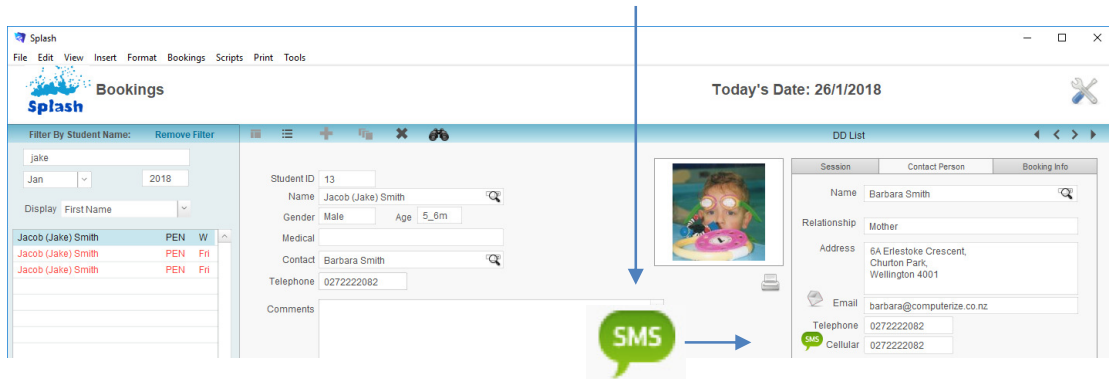
3. The **Enter New SMS** dialog will be displayed on your screen.



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)

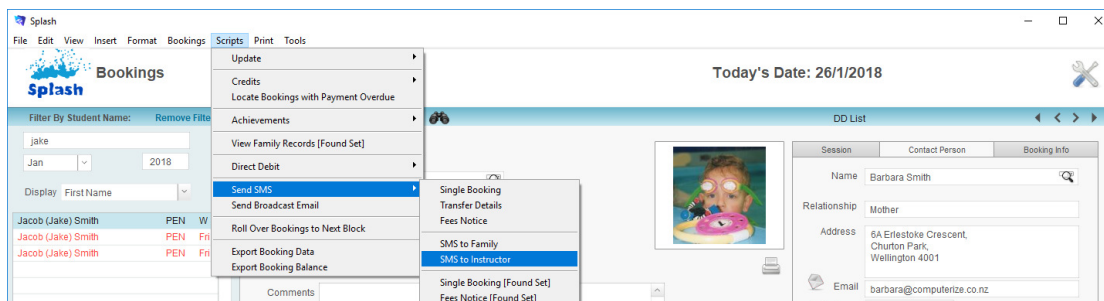
An alternative to sending a SMS to the family as described above is to initiate the message from a desktop icon rather than a menu. Simply locate a booking for the required family and click once on the Contact person tab card. Then simply click once on the SMS button displayed to the left of the Primary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



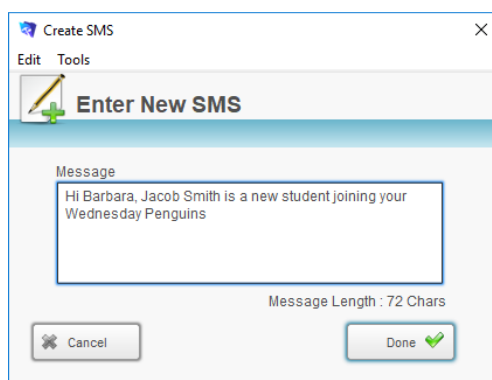
Sending a SMS to the Instructor (from Menu)

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.



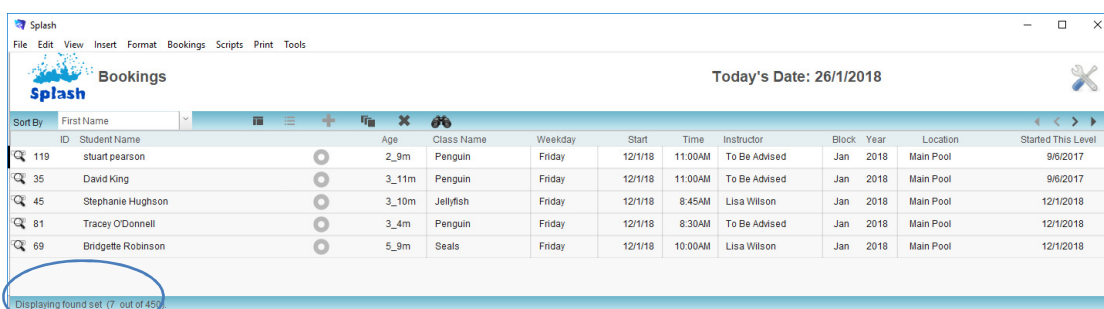
3. The **Enter New SMS** dialog will be displayed on your screen.



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.

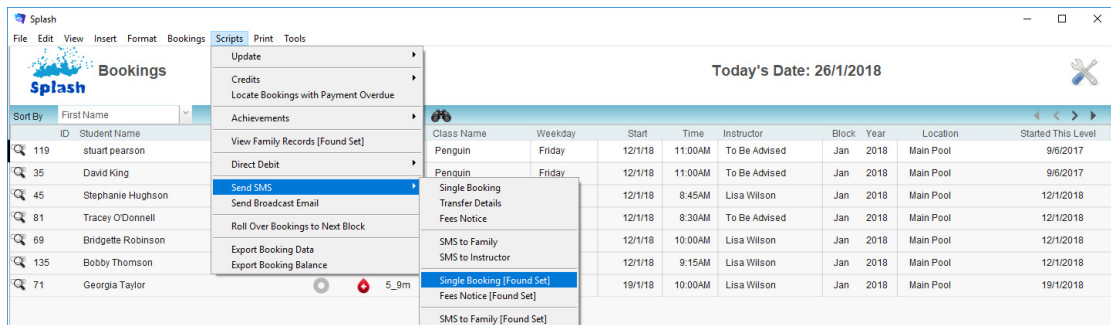
This command will only be successful if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

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.

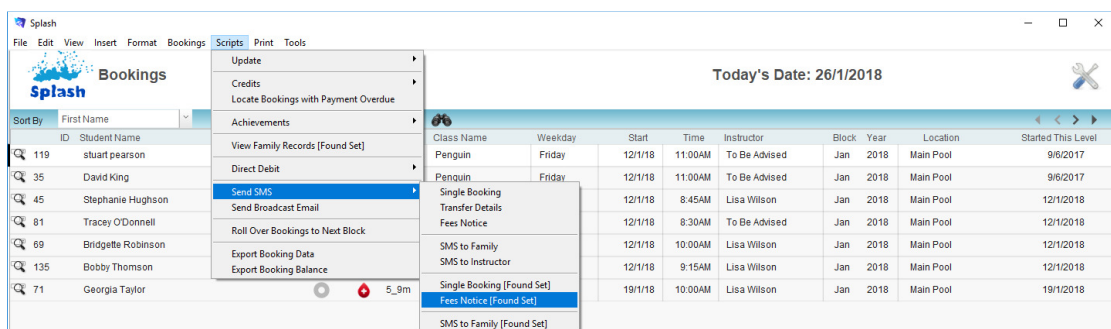


4. Each Booking SMS messages will be generated and sent, a copy will be placed on the clients file.

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.

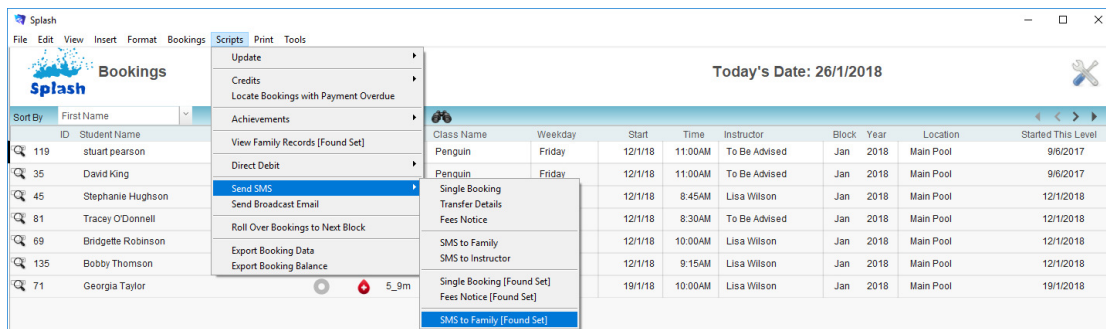


3. The Fee Notice SMS will be generated and sent, a copy will be placed on the clients file.

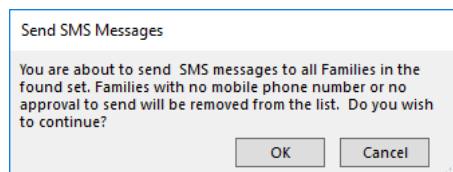
Sending a SMS to the Family (from Menu)

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

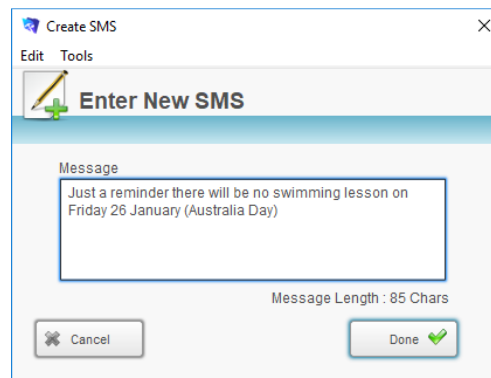
1. Follow step 1 described above to locate bookings for the required families.
2. Select **Send SMS** from the Scripts menu. Choose **SMS to Family [Found Set]** from the pop-out menu displayed.



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.

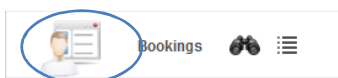
This command enables you to quickly rebook all or some of your existing students into the same session for the coming block. This function will only be successful if you have rolled over the corresponding sessions (see Rollover Sessions – Sessions Module).

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.

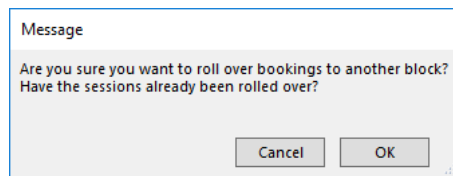
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Booking** icon



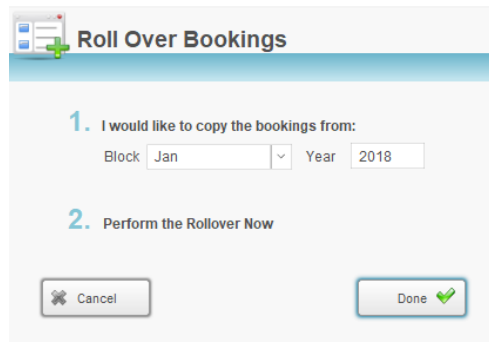
3. Go to the **Scripts** menu to select **Rollover Bookings to Next Block**.

ID	Student Name	Class Name	Weekday	Start	Time	Instructor	Block	Year	Location	Started This Level
119	stuart pearson	Penguin	Friday	12/1/18	11:00AM	To Be Advised	Jan	2018	Main Pool	9/6/2017
35	David King	Penguin	Friday	12/1/18	11:00AM	To Be Advised	Jan	2018	Main Pool	9/6/2017
45	Stephanie Hughson	Jellyfish	Friday	12/1/18	8:45AM	Lisa Wilson	Jan	2018	Main Pool	12/1/2018
81	Tracey O'Donnell	Penguin	Friday	12/1/18	8:30AM	To Be Advised	Jan	2018	Main Pool	12/1/2018
69	Bridgette Robinson	Seals	Friday	12/1/18	10:00AM	Lisa Wilson	Jan	2018	Main Pool	12/1/2018
135	Bobby Thomson	Starfish	Friday	12/1/18	9:15AM	Lisa Wilson	Jan	2018	Main Pool	12/1/2018
71	Georgia Taylor	Seals	Friday	19/1/18	10:00AM	Lisa Wilson	Jan	2018	Main Pool	19/1/2018

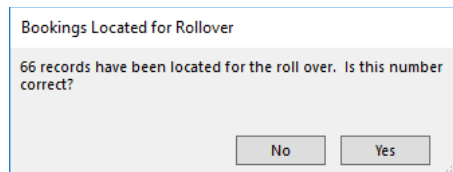
4. A message dialog will be displayed on your screen. You will be asked to confirm that the sessions have been rolled over – remember this process will fail if you have not rolled over the corresponding sessions.



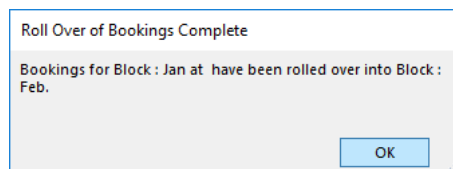
5. Click OK if the sessions have been created, or Cancel to exit the rollover process.
6. If you clicked OK (above) the **Rollover Bookings** dialog box will be displayed on your screen.
7. You are now required to define the term/block and year of the bookings you want to be copied. Click once in the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



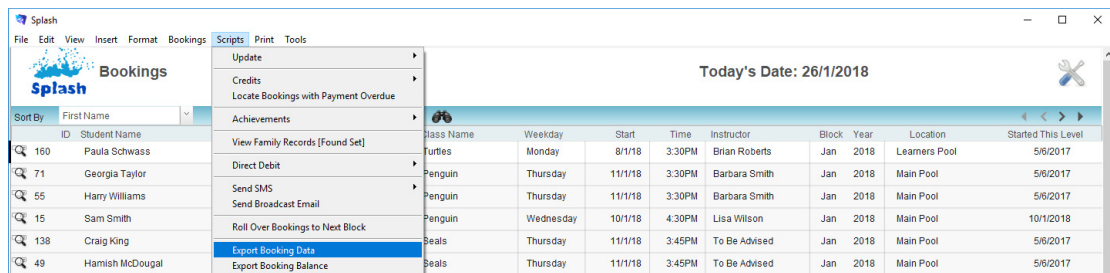
NB: After completing the rollover use the transfer a booking button to move any students who need to change class time or level. When all amendments have been made simply email a confirmation letter to each family.

Exporting Booking Data

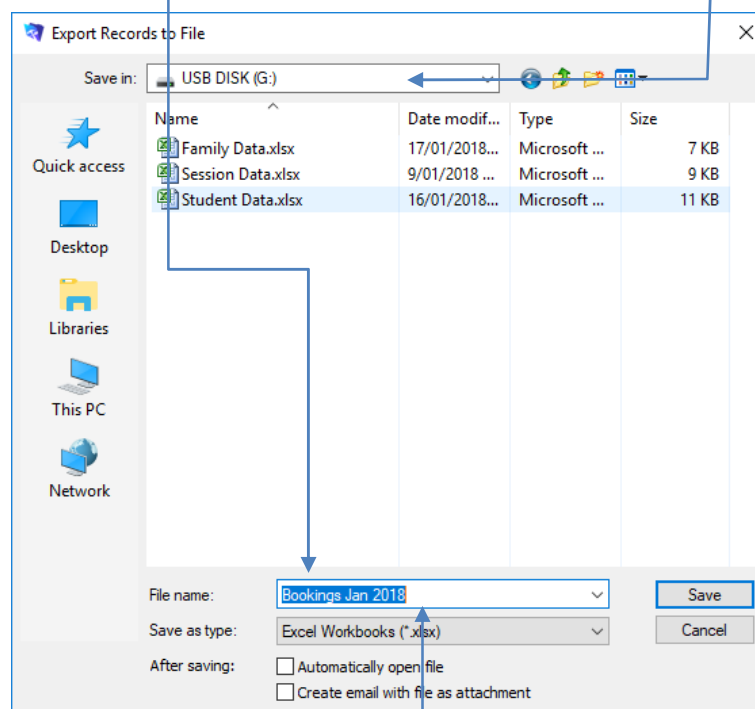
You can export Splash data to a new file and then open it in another application. For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

Exporting Records to Excel

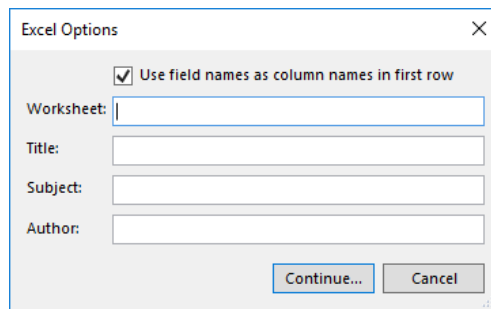
1. Use the **Finding a Booking** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Booking Data** from the **Scripts** menu.



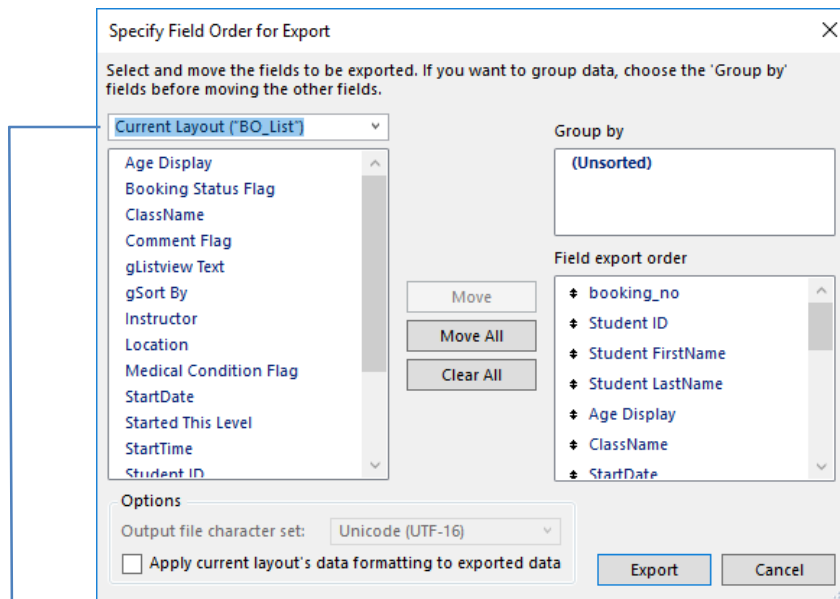
4. The **Export Records to File** dialog will be displayed on your screen.
5. Enter the name you wish to call your file and choose a location to store the file.



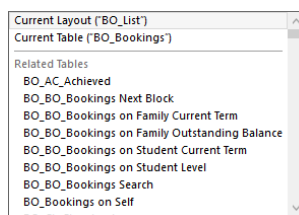
6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



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.

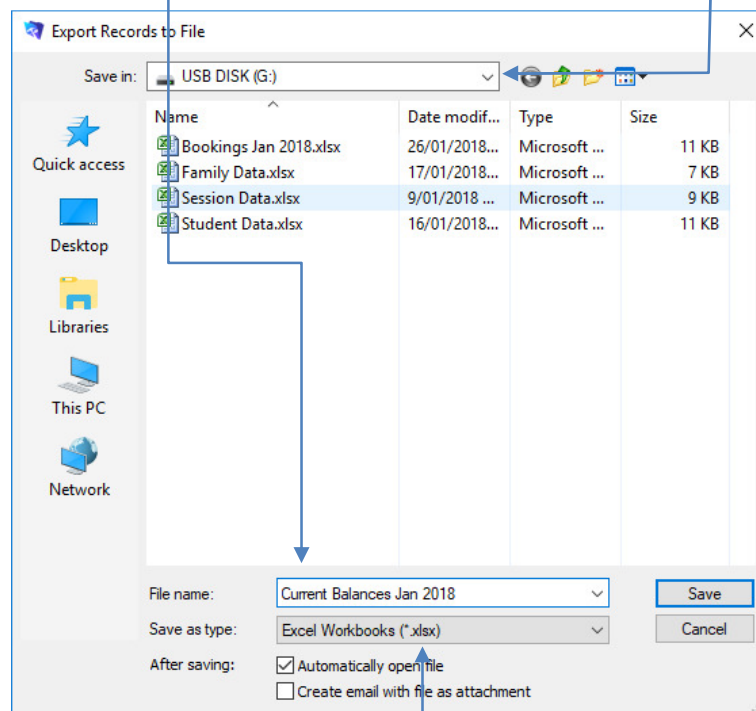


12. When all the required fields are displayed in the Field Export Order list click the **Export** button.
13. The Excel file will be saved to your computer ready for use.

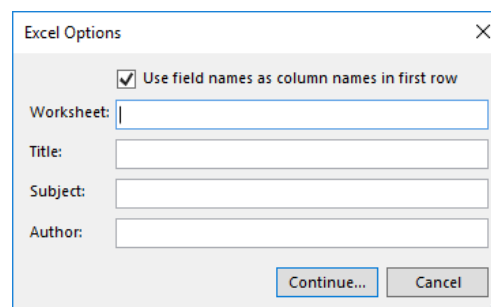
	A	B	C	D	E	F	G	H	I	J	K
	booking_no	Student ID	Student FirstName	Student LastName	Age Display	ClassName	StartDate	StartTime	Term	Year	Instructor
1	48508	160 Paula	Schwass	5_1m	Turtles	08/01/2018	15:30:00 Jan			2018	Brian Roberts
2	48509	71 Georgia	Taylor	5_2m	Penguin	11/01/2018	15:30:00 Jan			2018	Barbara Smith
3	48510	55 Harry	Williams	4_9m	Penguin	11/01/2018	15:30:00 Jan			2018	Barbara Smith
4	48511	15 Sam	Smith	6_3m	Penguin	10/01/2018	16:30:00 Jan			2018	Lisa Wilson
5	48512	138 Craig	King	9_6m	Seals	11/01/2018	15:45:00 Jan			2018	To Be Advised
6	48513	49 Hemsch	McDougal	6_11m	Seals	11/01/2018	15:45:00 Jan			2018	To Be Advised
7	48514	61 Jack	McArthur	8_7m	Seals	11/01/2018	15:45:00 Jan			2018	To Be Advised
8	48515	2022 Paul	Fairbrother	8_8m	Seals	11/01/2018	15:45:00 Jan			2018	To Be Advised
9	48516	164 Billy	Jones	9_8m	Turtles	08/01/2018	16:00:00 Jan			2018	Brian Roberts
10	48517	166 William	Smith	7_11m	Jellyfish	11/01/2018	16:00:00 Jan			2018	David Smith
11	48518	158 Simon	Thomas	8_0m	Jellyfish	11/01/2018	16:00:00 Jan			2018	David Smith

Export Bookings with the Account Balance

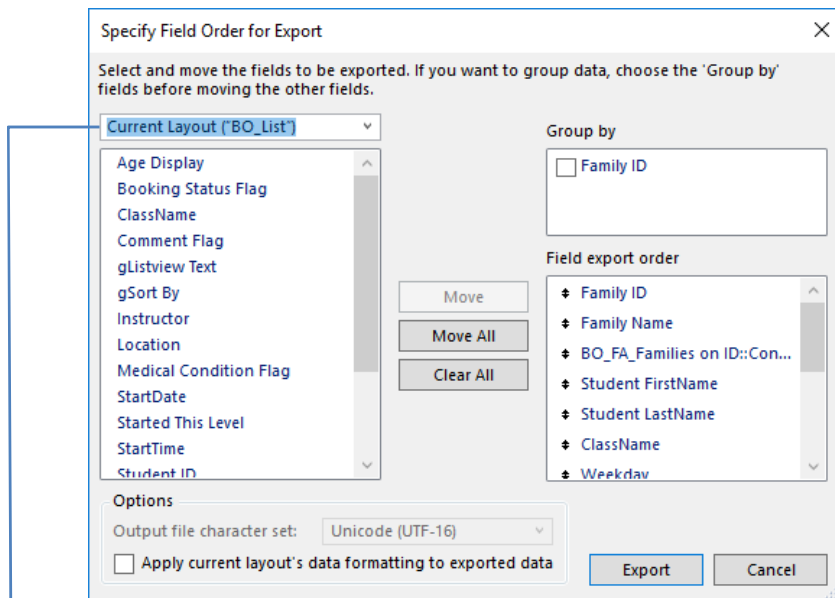
1. Use the **Finding a Booking** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Booking Data** from the **Scripts** menu.
4. The **Export Records to File**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



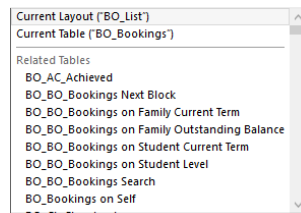
6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



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 First Name	Student Last Name	ClassName	Weekday	StartTime	Booking Status	BO_FA_Families on ID::Email	Families on ID::Teleph
1											
2		Watkins	Barbara Smith	Sam	Watkins	Jellyfish	Monday	16:30:00	Booking Made	barbara@computerize.co.nz	063724713
3		2 Smith	Barbara Smith	Lucas	Smith	Penguin	Monday	16:30:00	Paid in Full	barbara@computerize.co.nz	063724713
4		2 Smith	Barbara Smith	Jacob	Smith	Penguin	Wednesday	16:00:00	Booking Made	barbara@computerize.co.nz	063724713
5		2 Smith	Barbara Smith	Nicholas	Smith	Turtles	Thursday	11:00:00	Paid in Full	barbara@computerize.co.nz	063724713
6		9 Smith	Daniel Smith	Phillip	Smith	Penguin	Monday	16:00:00	Booking Made	computerize@extra.co.nz	04 987 6501
7		9 Smith	Daniel Smith	Jennifer	Smith	Jellyfish	Thursday	11:00:00	Booking Made	computerize@extra.co.nz	04 987 6501
8		10 Brown	Sam Brown	Amanda	Brown	Penguin	Sunday	15:30:00	Booking Made	computerize@extra.co.nz	04 564 5212
9		11 Anderson	David Anderson	Sally	Anderson	Shrimps	Thursday	10:00:00	Booking Made	computerize@extra.co.nz	09 897 9845
10		11 Anderson	David Anderson	Jamie	Anderson	Jellyfish	Monday	17:00:00	Booking Made	computerize@extra.co.nz	09 897 9845
11		14 Zimmerman	Andy Zimmerman	Zac	Zimmerman	Seals	Monday	17:15:00	Booking Made	computerize@extra.co.nz	09 765 1445
12		15 Thomson	Anthony Thomson	Robert	Thomson	Starfish	Tuesday	17:00:00	Paid in Full	computerize@extra.co.nz	04 567 8576
13		15 Thomson	Anthony Thomson	Caroline	Thomson	Shrimps	Thursday	09:30:00	Booking Made	computerize@extra.co.nz	04 567 8576
14											


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

Barbara Smith
6A Erlestoke Crescent
Churton Park
WELLINGTON 4001

26 January 2018

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?

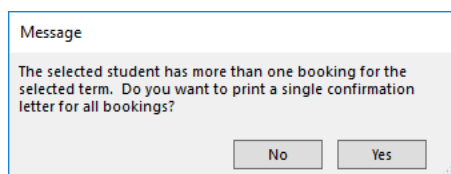
Cancel

Print

Email


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
26 January 2018

Martha Taylor
79 Main St
Tawa
WELLINGTON 4010

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.

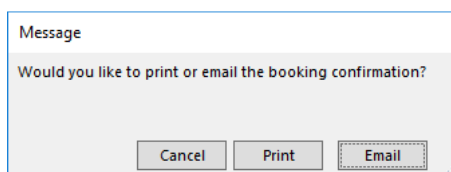
Thank you for swimming with us.

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

Barbara Smith
6A Erlestoke Crescent
Churton Park
WELLINGTON 4001


26 January 2018

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?

Cancel Print Email

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.

OK

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.

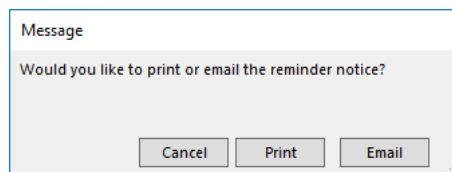
If you wish to continue swimming please forward payment or contact our office on to discuss payment options.

Thank you for swimming with us.

Kind regards

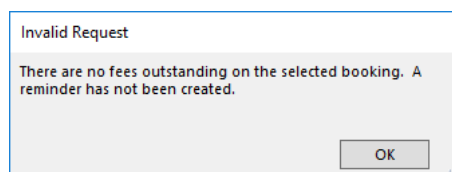
Learn To Swim Coordinator
Your Swim School Name Here

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

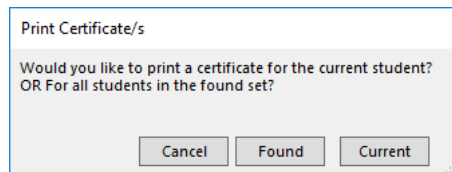
Would you like to print or email the booking confirmation?

Printing Certificates and Records of Achievement

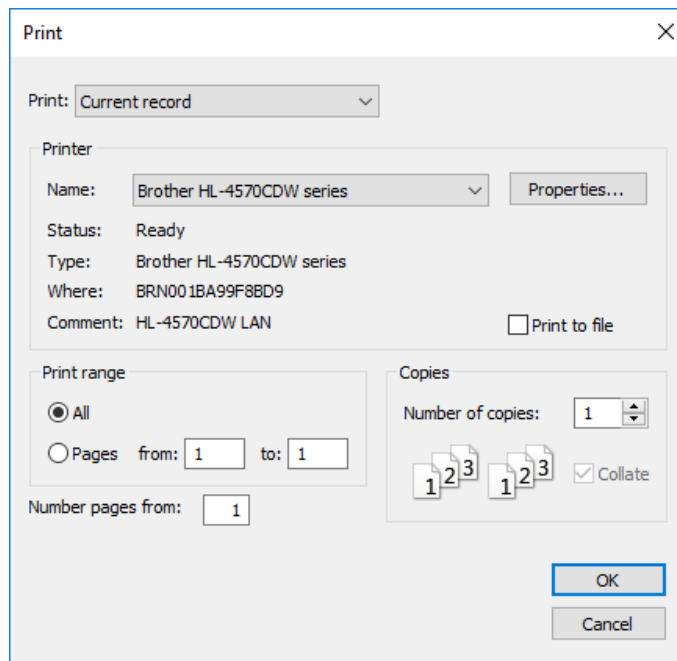
Printing Certificates

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

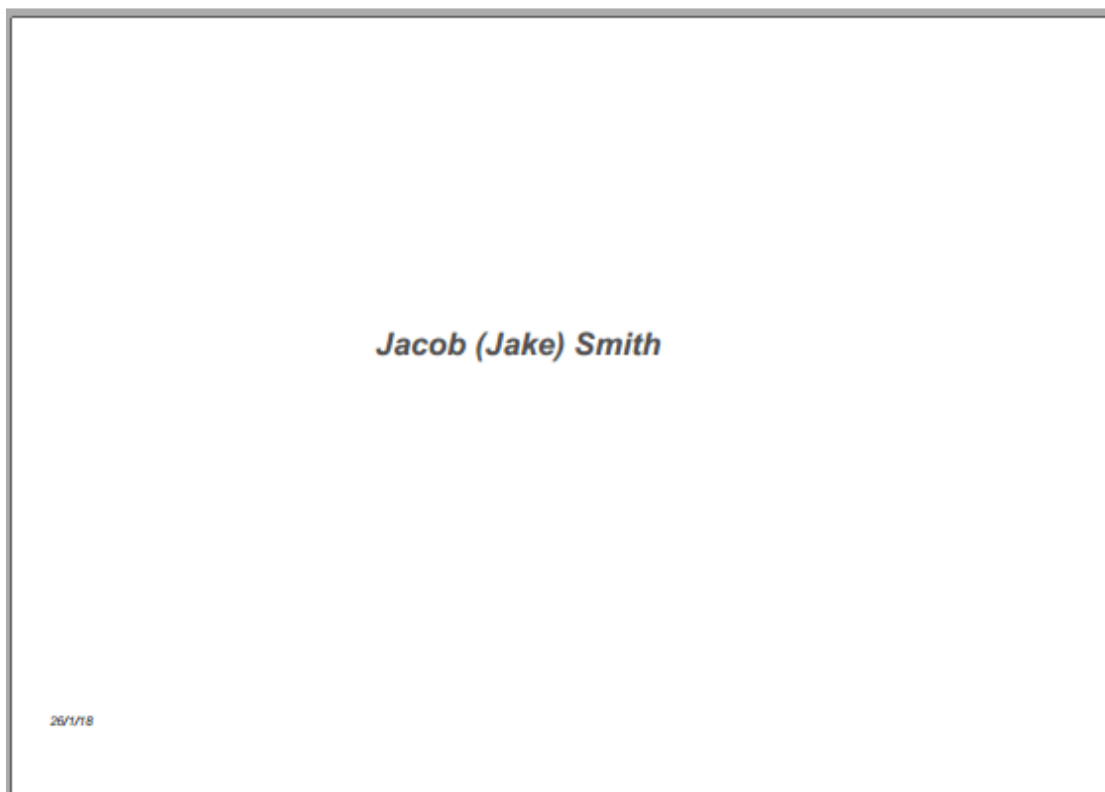
Copies

Number of copies: 1

☒ Collate

OK

Cancel



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

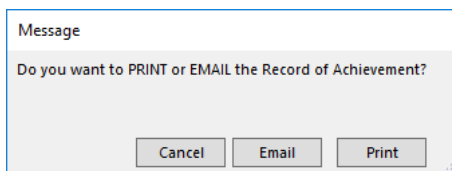
Printing a Record of Achievement

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

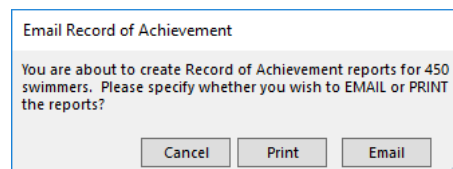
5

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.



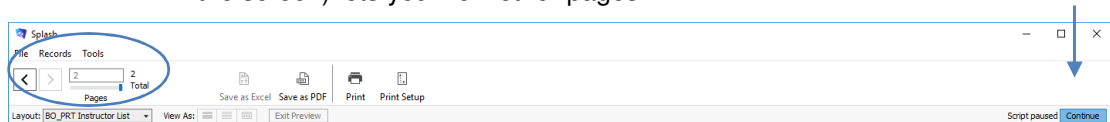
5. Click **Print** to print the report, **Email** to save the report as a PDF and email to each client, or **Cancel** to return to your original screen without printing or emailing.

Printing Booking Reports

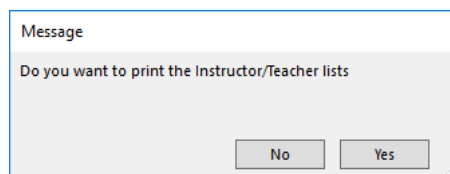
Printing a Student List for the Instructor

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.



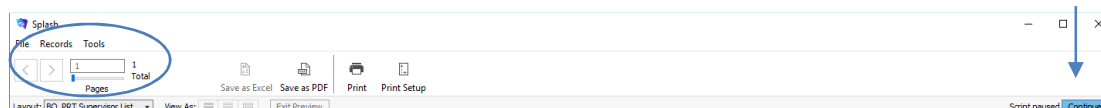
6. Click **OK** to print the report or Cancel to return to your original screen without printing.

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 bks
<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 bks
<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)											
				10/1	17/1	24/1	31/1				8 bks
<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 bks
<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 bks
<input type="radio"/>	Barry Robinson	4_0m	Nicola Robinso	P							2
<input type="radio"/>	james gill	2_5m		P							2

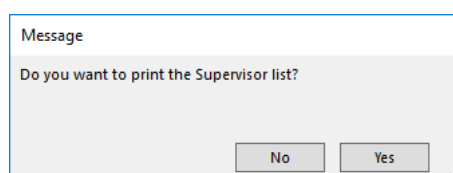
Printing a List of Students for the Pool Deck Supervisor

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.



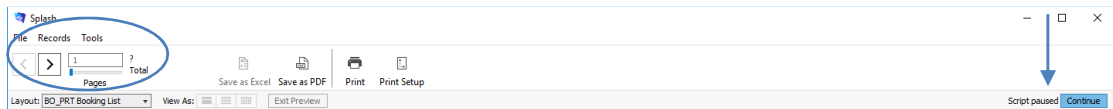
6. Click **OK** to print the report or Cancel to return to your original screen without printing.

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 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 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 type="radio"/>	Peter Aplin	3_0m	Sylvia Aplin	P	-	-	-	-	-	-	2

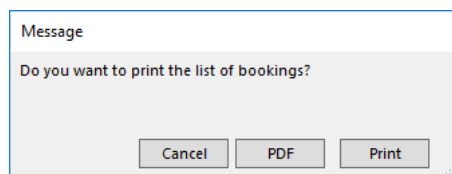
Printing a List of Bookings

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.

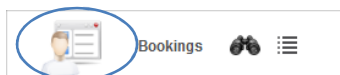
List of Bookings									
Student ID / Name	Class Name	Start Date / Time	Block / Year					Rebooked	Next Block
2032	sam jones	Dolphins	14/1/18	8:00 PM	Jan	2018	Booking Made	Yes	
115	Jennifer Smith	Jellyfish	11/1/18	11:00 AM	Jan	2018	Booking Made	Yes	
158	simon thomas	Jellyfish	11/1/18	4:00 PM	Jan	2018	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

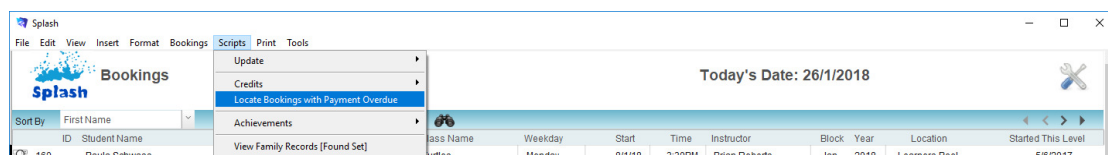
Information displayed in this report is defined by the found set of records. Prior to generating this report you must perform a find to locate the group of records you wish to include in your report.

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

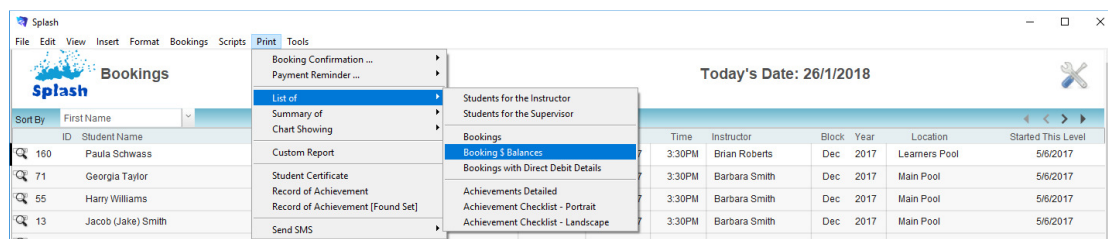
Year (leave empty for all terms)
2017

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

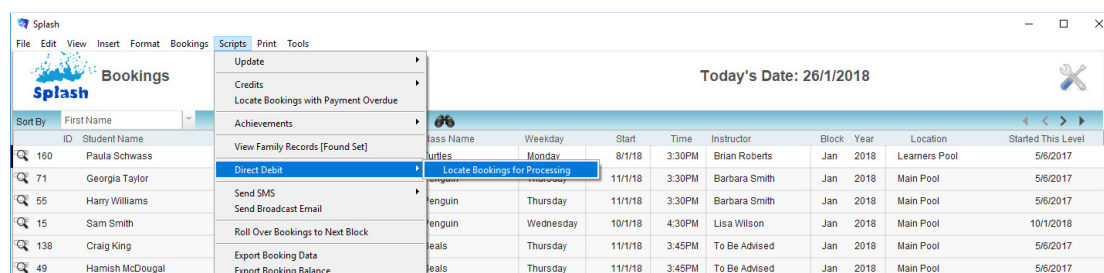
8. Click **OK** to print the report or Cancel to return to your original screen without printing.

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

The 'Locate Payments' dialog box is shown. It contains the text 'Enter find criteria for payment processing.' Below this, there are two input fields: 'Block' with the value 'Jan' and 'Year' with the value '2018'. At the bottom right, there are 'Cancel' and 'OK' buttons.

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

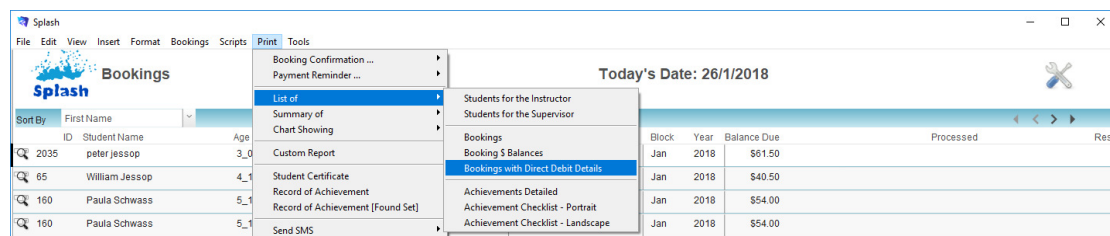
The 'Specify Debit Type' dialog box is shown. It contains the text 'Are you requesting funds from Bank Accounts or Credit Cards?'. At the bottom, there are three buttons: 'Cancel', 'CC', and 'Bank'.

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

The screenshot shows the 'Splash' application window with the 'Bookings' menu open. The 'Scripts' option is selected, and a submenu is displayed with 'Direct Debit' highlighted. Within the 'Direct Debit' submenu, 'Locate Bookings for Processing' is the selected option. The background shows a list of bookings with columns for 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

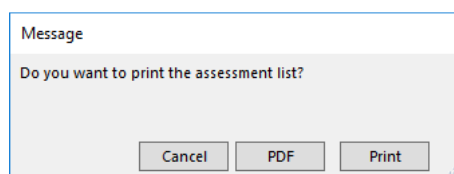
- Click **Print** to print the report, PDF to save a copy of the report, or Cancel to return to your original screen without printing.

Bookings - Direct Debit Payment Summary		
Schedule as at 26/1/2018		
	Amount	Balance
jessop (Tony Jessop)		
<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
Schwass (Robyn Schwass)		
<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
Total Due as at 26/1/2018	\$61.00	

Printing an Achievement List (Detailed)

The detailed assessment list provides a list of the found set of students and the goals they are working towards. The result of any previous assessment within the same level is also displayed on the report. Prior to generating this report you must perform a find to locate the group of records you wish to include in your report.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ... Achievements Detailed** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.



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

Assessment List for 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	Fves	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"/>	11
3:30 PM - Jellyfish (Main Pool) David Smith (1 Students)										
			Fr	Kirk	Blk	Kirk	K	Thun	10fr	10blk
<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"/>	2
3:30 PM - Penguin (Main Pool) Barbara Smith (2 Students)										
			BB	Fves	Bd	Kirk	Torp	4	Arms	Blk
<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"/>	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"/>	0
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"/>	0
<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"/>	0
<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"/>	0
<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"/>	0

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	Faaa	FFloa	Torp													Blocks
	Paula Schwass	5_1m																		11

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

			Fr	Krk	Bk	Krk	K	Due	10f	10bk										Blocks
	James Wilson	4_1m																		2

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

			BB	Faaa	Bd	Krk	Torp	4	Arma	Bk	Krk										Blocks
	Georgia Taylor	5_9m		L		M		M		I											14
	Harry Williams	4_9m																			9

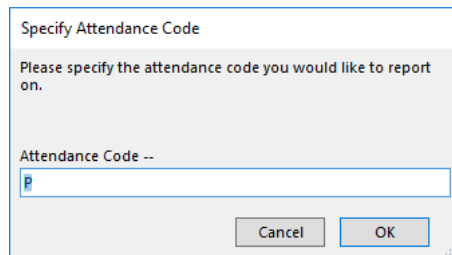
3:45 PM - Seals (Main Pool) To Be Advised (4 Students)

			Bf	Krk	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

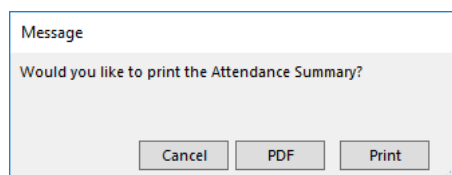
Please specify the attendance code you would like to report on.

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

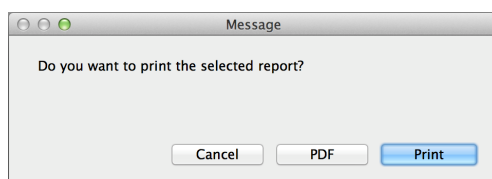
6. Click **OK** to print the report or Cancel to return to your original screen without printing the report.

Summary of Attendance Attendance Code : P														
Block Jan - 2018														
Monday	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
Tuesday	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
Wednesday	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
Thursday	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
Friday	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.

Summary of Bookings			
Summary by Class Name			
	Number of Bookings	Number of Exits	Number of Catchups
Term: 2 2014	36	1	6
Dolphins	17	0	1
<i>Friday</i>	1	0	0
<i>Saturday</i>	2	0	0
<i>Sunday</i>	9	0	1
<i>Tuesday</i>	3	0	0
<i>Wednesday</i>	2	0	0
Seals	11	1	0
<i>Friday</i>	2	0	0
<i>Sunday</i>	7	1	0
<i>Tuesday</i>	1	0	0
<i>Wednesday</i>	1	0	0

Printing a Summary of Bookings by Week Day

This report displays the total number of students booked in each type of class for each day of the week. Information displayed in this report is defined by the found set of records.

1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of... Bookings by Weekday** from the Print menu.
4. The report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** button on the status panel (or Press ENTER). A message will be displayed asking if you wish to print the selected report.

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.

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 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
Dolphins	\$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
Jellyfish	\$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
Penguin	\$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
Seals	\$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
Shrimps	\$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
Starfish	\$360.00	\$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
Monday	\$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
Tuesday	\$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
Wednesday	\$663.50	\$66.15		\$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
Thursday	\$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
Friday	\$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
Afternoon	\$3,027.00	\$251.25		\$0.00	\$0.00	\$0.00	\$145.80	\$2,829.95
Monday	\$942.00	\$88.20		\$0.00	\$0.00	\$0.00	\$73.80	\$780.00
Tuesday	\$840.00	\$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
Morning	\$1,045.00	\$95.95		\$0.00	\$0.00	\$0.00	\$85.05	\$864.00
Wednesday	\$120.00	\$12.00		\$0.00	\$0.00	\$0.00	\$0.00	\$108.00
Thursday	\$845.00	\$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
Total Reported	\$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?

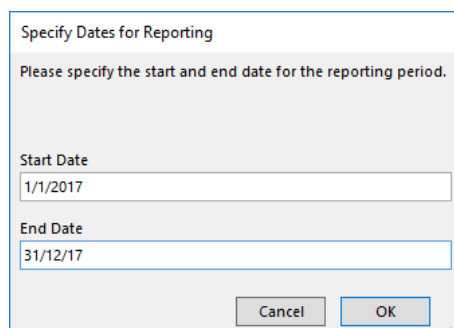
5. Click **OK** to print the report or Cancel to return to your original screen without printing.

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.



Specify Dates for Reporting

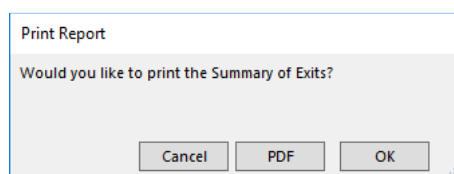
Please specify the start and end date for the reporting period.

Start Date
1/1/2017

End Date
31/12/17

Cancel 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.



Print Report

Would you like to print the Summary of Exits?

Cancel PDF 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

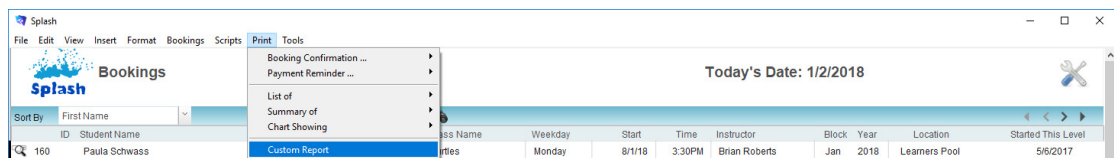
NB: Catchup/Makeup lessons are NOT included in exit reporting.

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. It has a title bar with 'Produce Summary Report' and standard window controls. Below the title bar is a menu with 'Edit' and 'Tools'. The main area is titled 'Specify Report Format' and contains 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
At the bottom right is an 'OK' button with a green checkmark. At the bottom left is a 'Cancel' button with a red X icon.

Defining a 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 ☒

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 ☐

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.

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
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
Morning	23	0	2
Brian Roberts	11	0	0
David Smith	5	0	0
Lisa Wilson	4	0	0
To Be Advised	3	0	2
Total Reported	66	0	4

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.

Produce Summary Report

Edit Tools

Specify Report Format

Step 1 : Choose Existing Report Format
Report Name Summary of Bookings

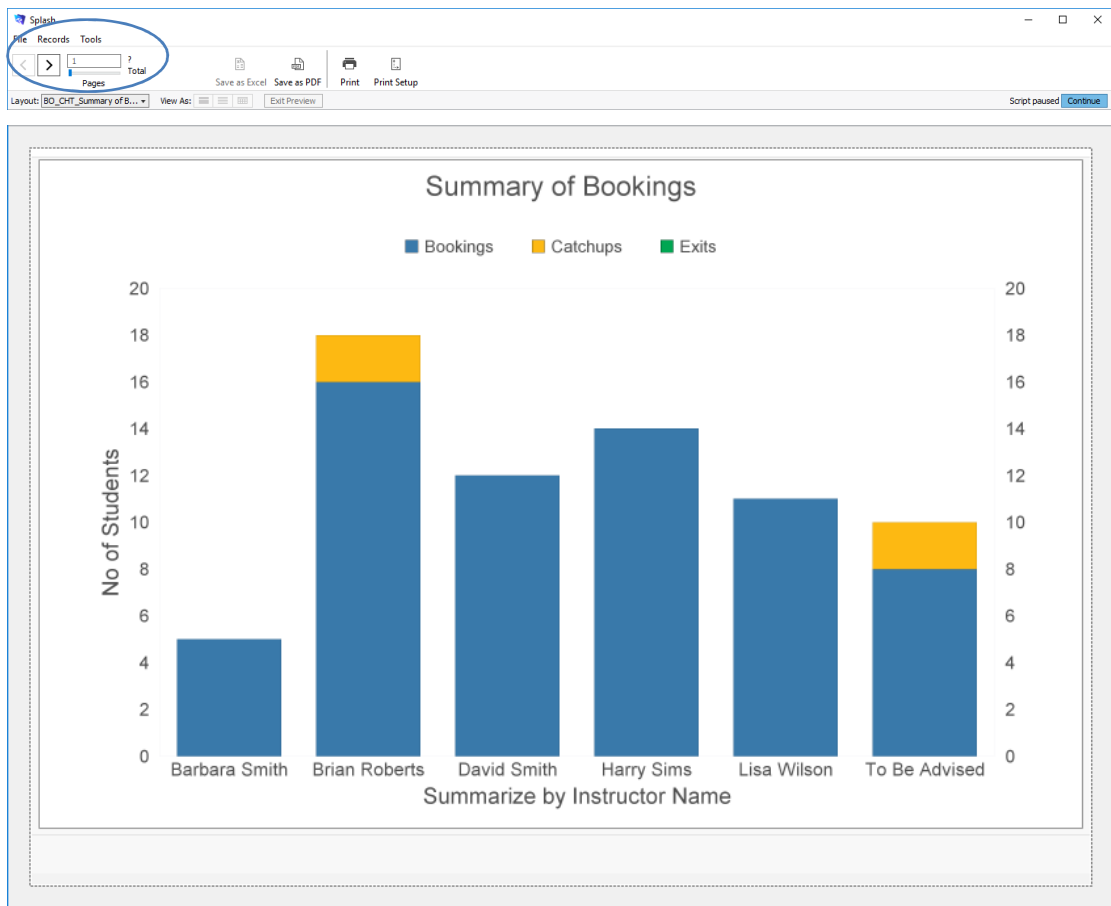
Step 2: Choose/Update Report Summary Groups
Group 1 Summarize by Instructor Name

Step 3: Enter Report Title
Report Title Summary of Bookings

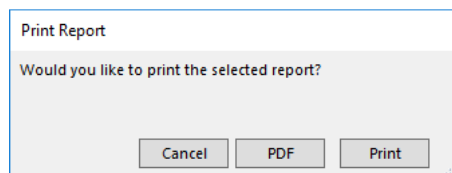
Step 4: Produce Report
OK

Cancel

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

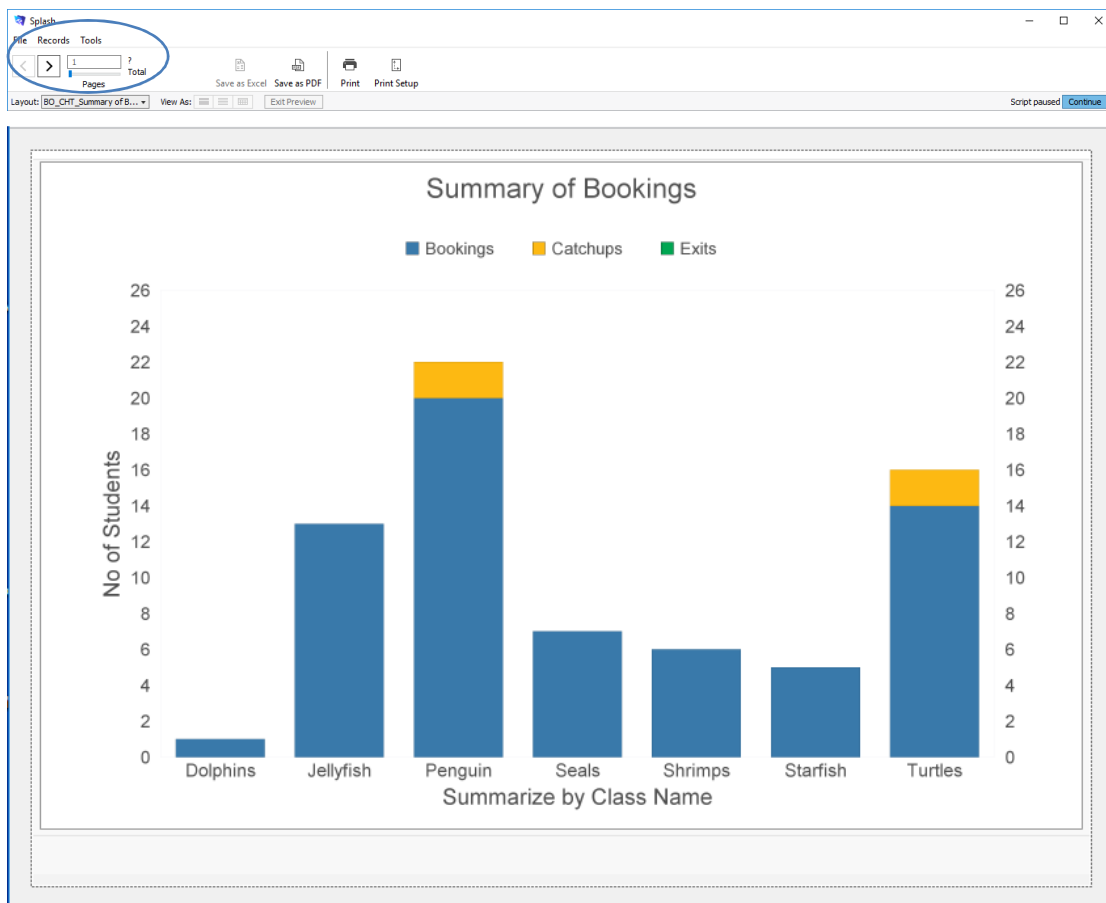
Step 1 : Choose Existing Report Format

Report Name

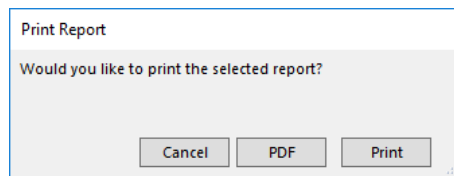
Step 2: Choose/Update Report Summary Groups

Group 1

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.



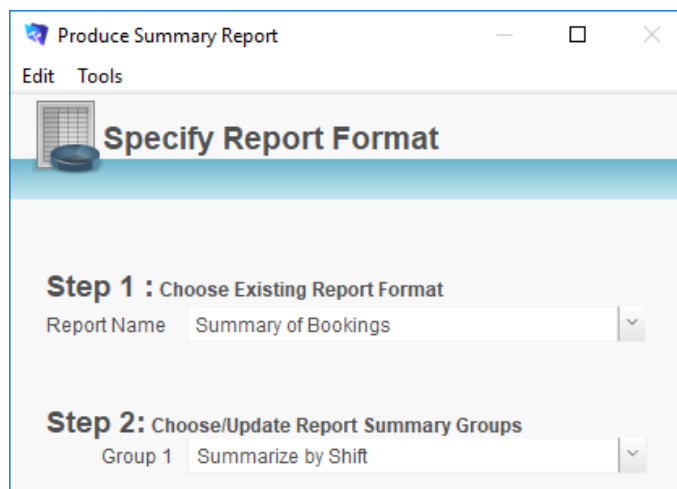
8. The **Print Report** dialog will be displayed on your screen.



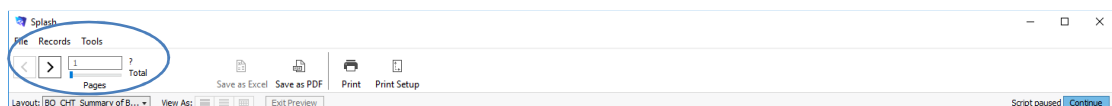
Printing a Chart Showing Bookings by Shift

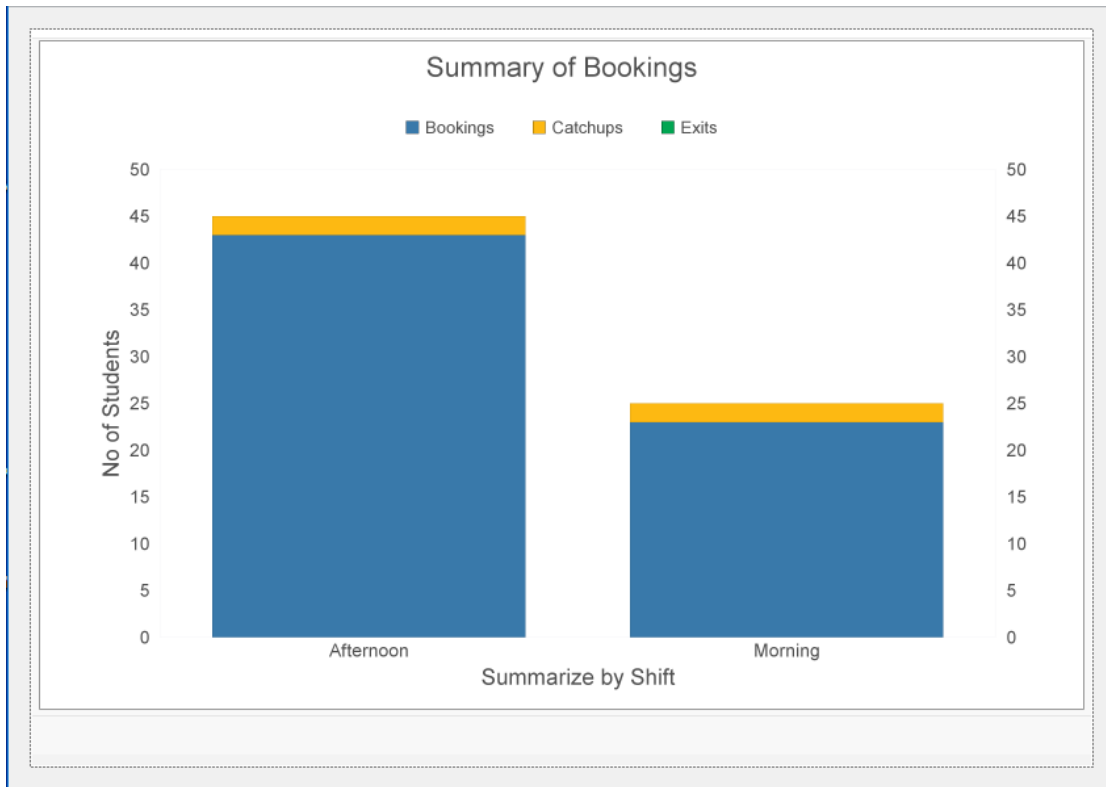
This report displays as a graph; it shows the number of bookings for each shift within the found set of records.

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.

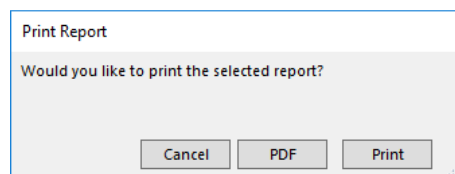


4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
Step 1 = Summary of Bookings
Step 2 = Group 1 set to Summarize by Shift
Step 3 = Report Name set to Summary by Shift.
6. Amend the grouping options at Step 2 if required and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





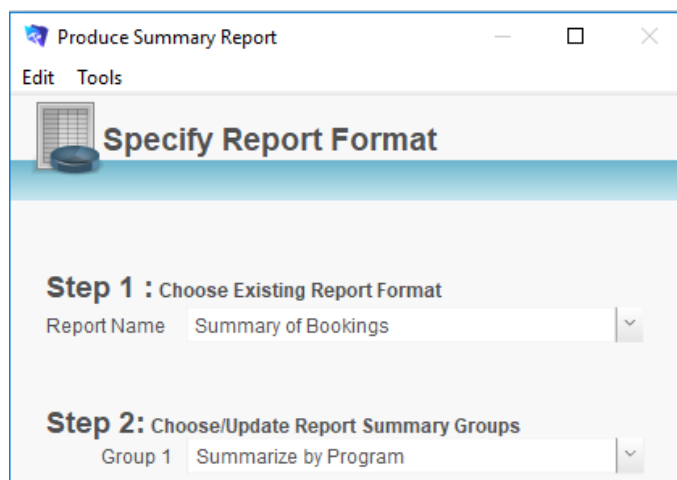
8. The **Print Report** dialog will be displayed on your screen.



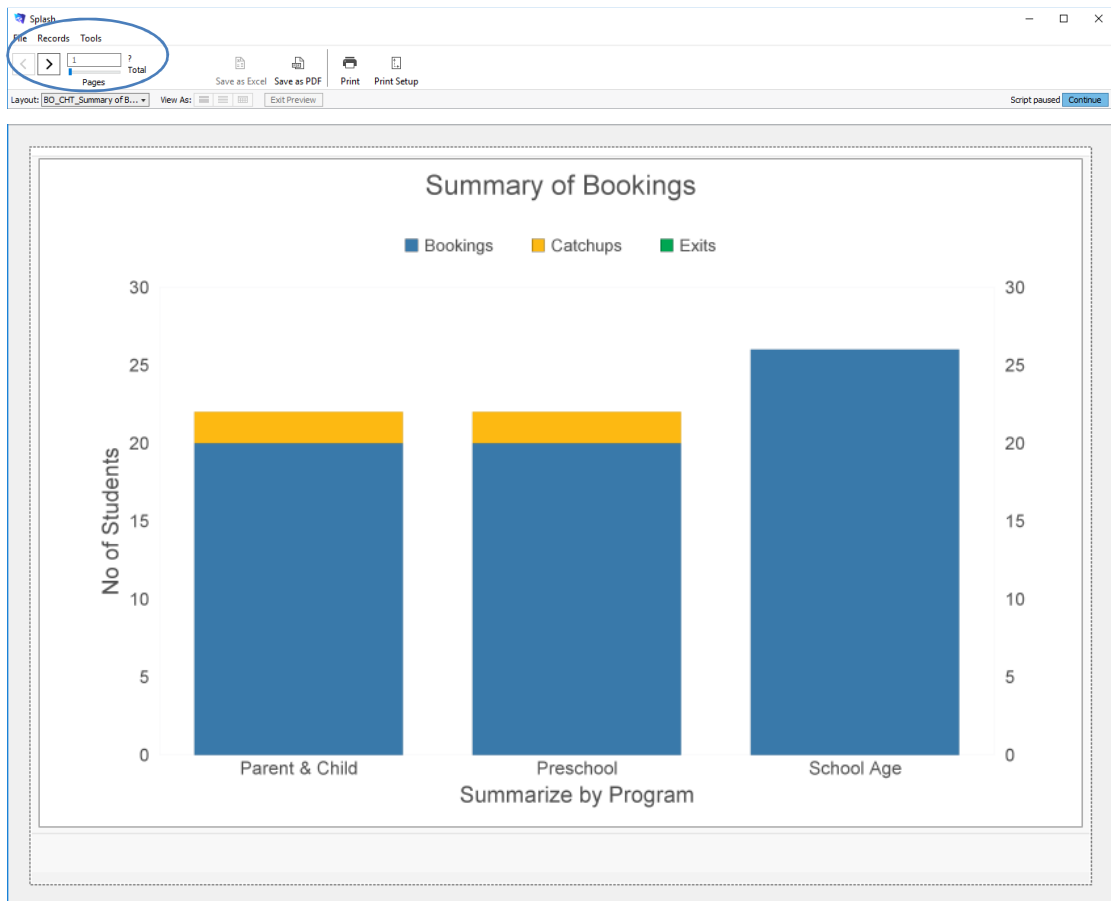
Printing a Chart Showing Bookings by Program

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

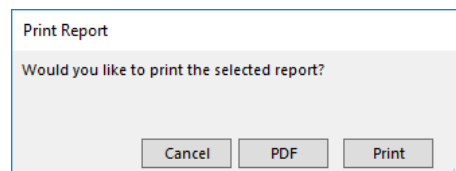
1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Summary of Bookings by Program** from the Print menu.



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

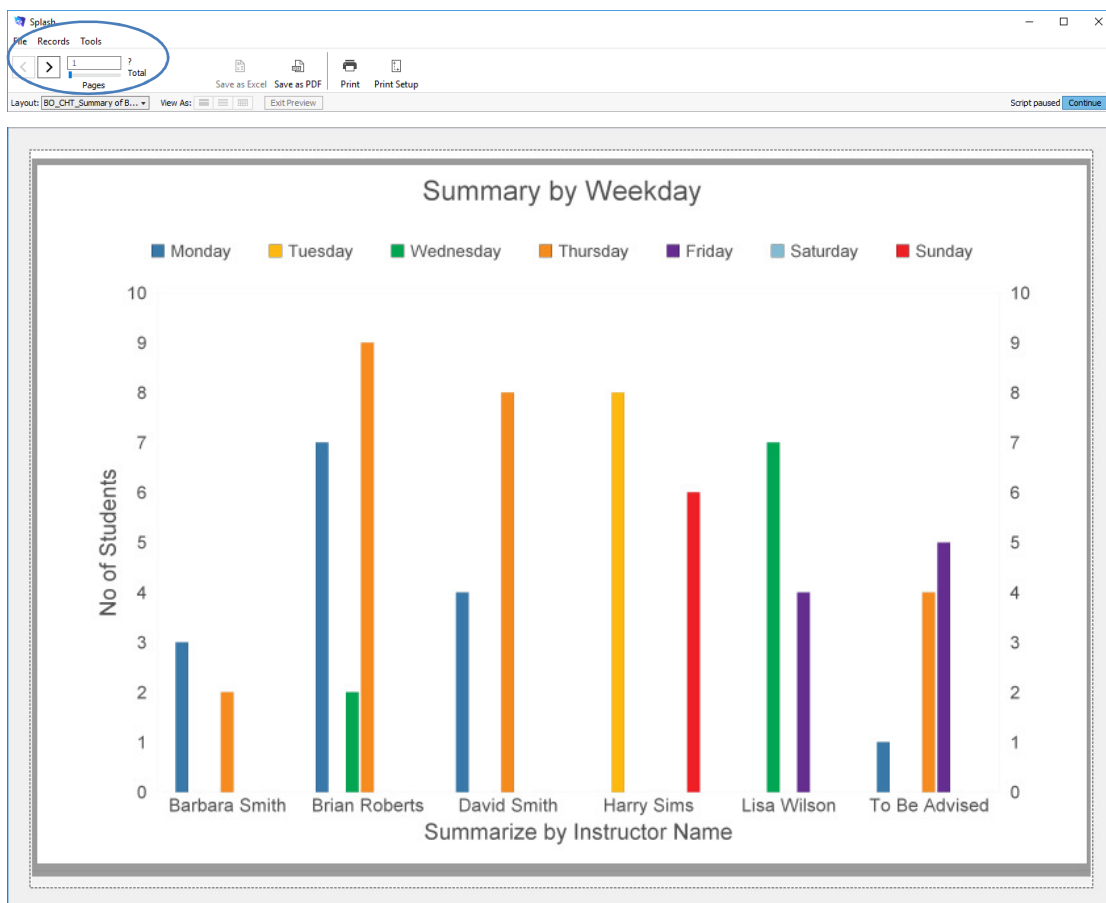
Edit Tools

Specify Report Format

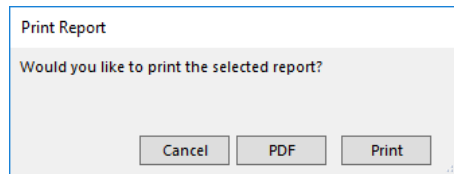
Step 1 : Choose Existing Report Format
 Report Name: Summary by Weekday

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.



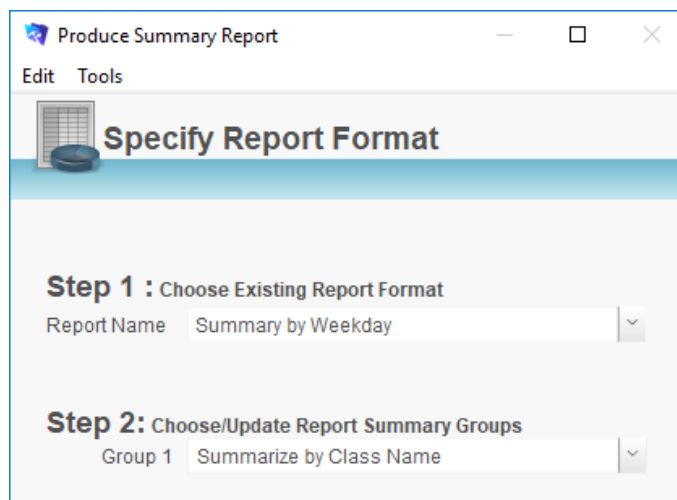
8. The **Print Report** dialog will be displayed on your screen.



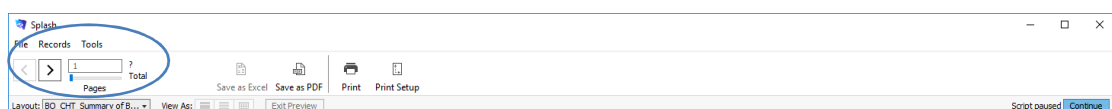
Printing a Chart Showing Bookings by Weekday and Class Name

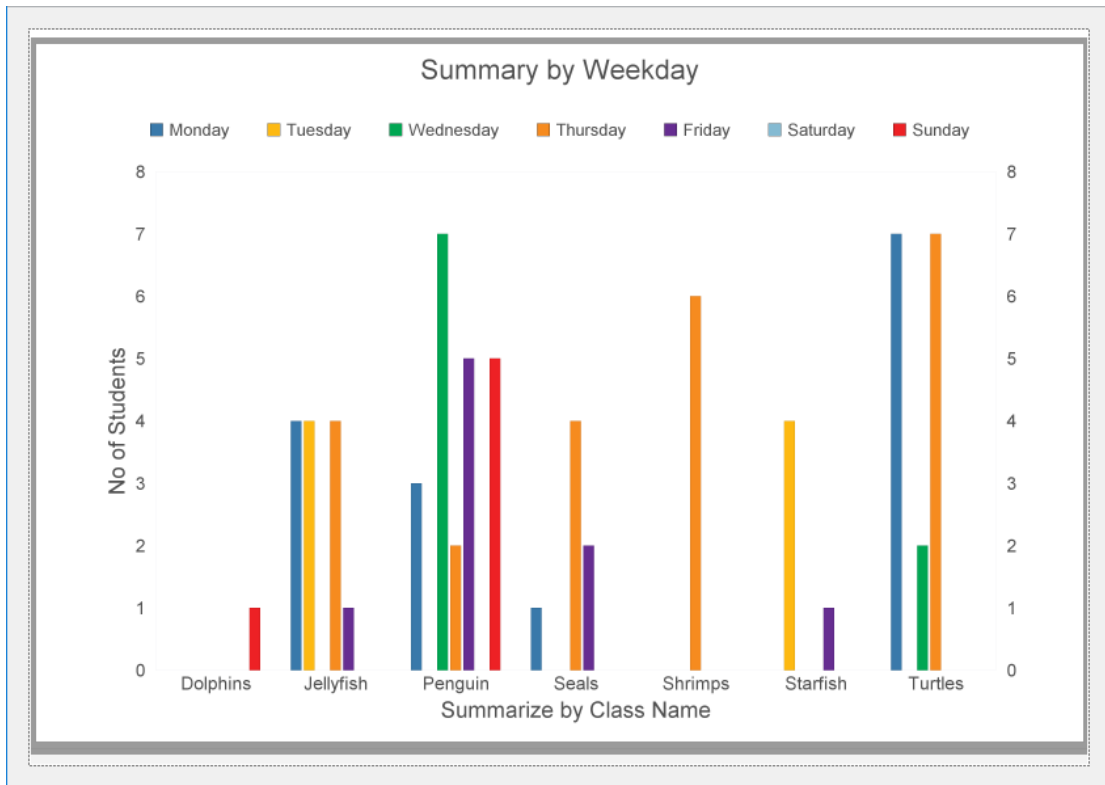
This report displays as a graph; it shows the number of bookings for each class name within each weekday for the found set of records.

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.

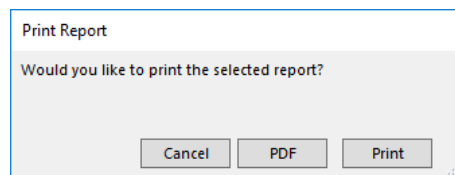


4. The Produce Summary Report dialog will be displayed on your screen.
5. Default data will be set at each of the three steps.
 Step 1 = Summary by Weekday
 Step 2 = Group 1 set to Summarize by Class Name
 Step 3 = Report Name set to Summary by Weekday.
6. Amend the grouping options at Step 2 if required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





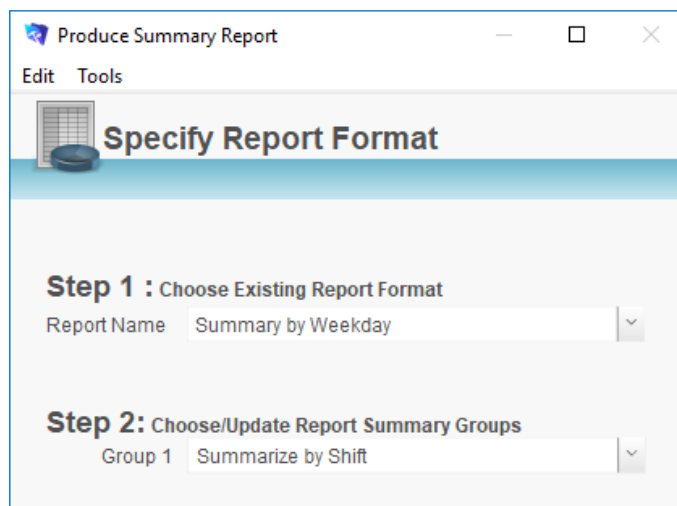
8. The **Print Report** dialog will be displayed on your screen.



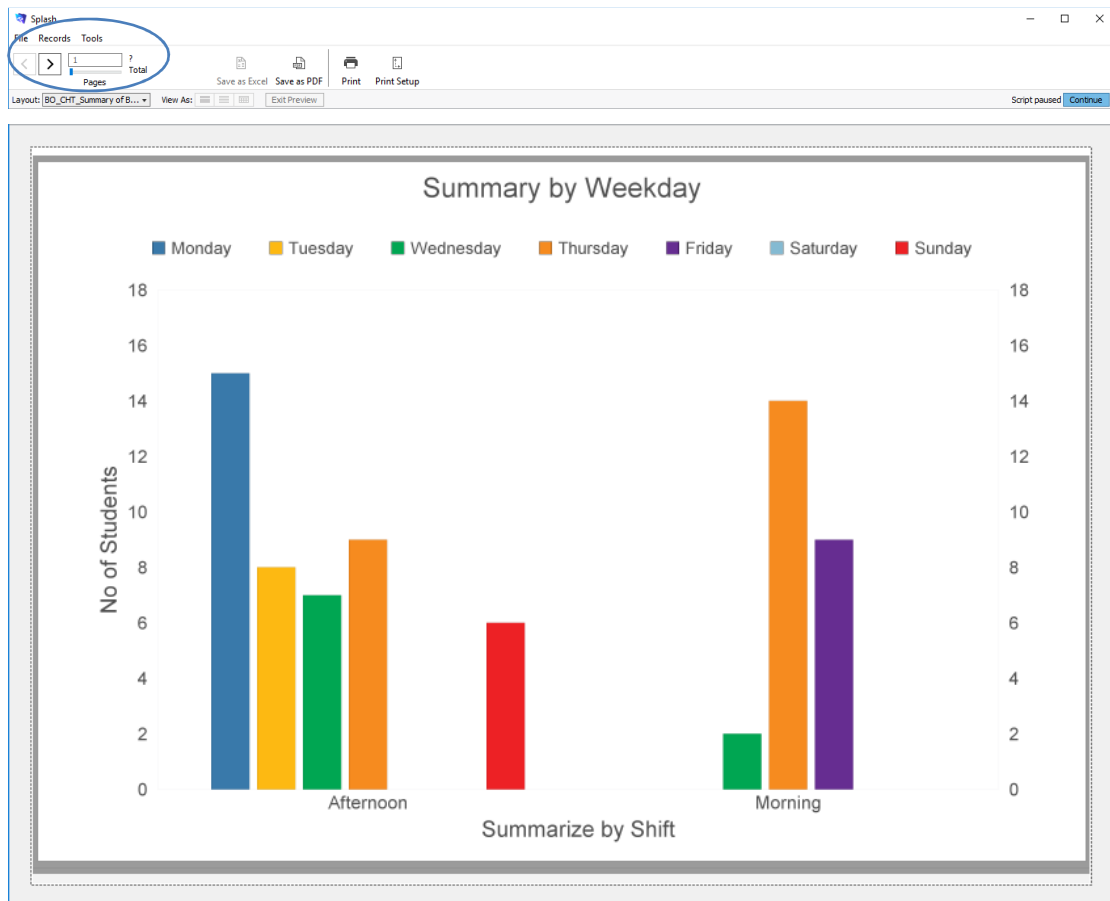
Printing a Chart Showing Bookings by Weekday and Shift

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

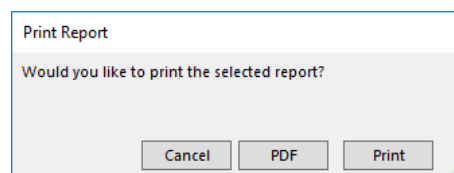
1. Use the **Finding a Booking** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing... Summary of Bookings by Weekday and Shift** from the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

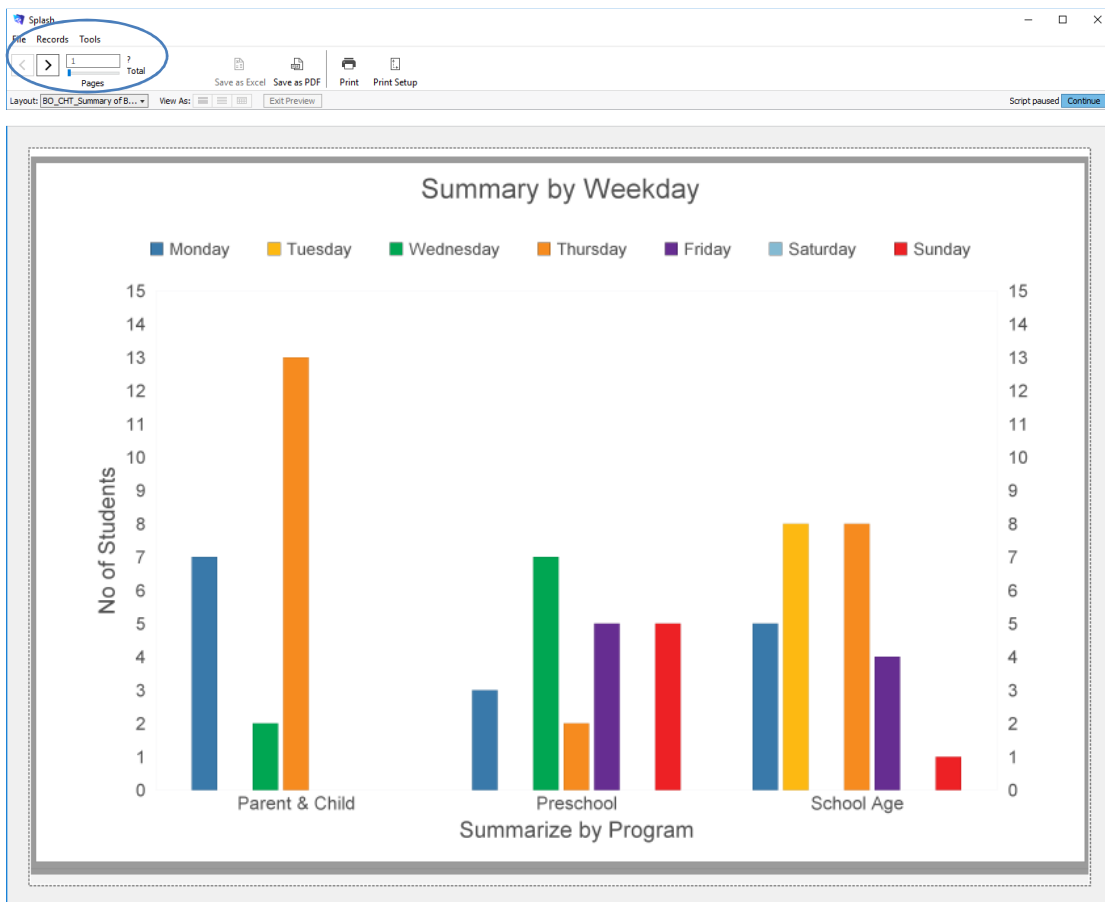
Edit Tools

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.

Print Report

Would you like to print the selected report?

Cancel

PDF

Print

Processing Direct Debit Payments

Splash direct debit payments are processed through the clearing house Merchant Warrior. In order to process payments you must first set up an account with Merchant Warrior. Go to www.merchantwarrior.com to create your account.

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'), Country (pre-filled with '61'), and Post Code.
- Postal Address:** Fields for Line 1, Line 2, Suburb, City (pre-filled with 'Wellington'), Country (pre-filled with '61'), and Post Code.
- Website:** A text field.
- Logo:** A field with a 'Click Arrow to Insert Logo' button and a placeholder image.
- Merchant Warrior Account Details:** A section with tabs for 'Contacts', 'Shifts', and 'Document Defaults'. It includes fields for 'Contact Details' (Full Name, Telephone, Mobile, Email), 'Accounts Contact' (Full Name, Telephone, Mobile, Email), 'ABN', 'Accepted Credit Cards' (checkboxes for Visa, Mastercard, Diners, AMEX), 'Direct Debit Processing' (Account Name, Account Password, API Phrase), and a 'Test Mode (Select if Yes)' checkbox which is circled in red.

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

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_8m	Penguin
Lucas Smith	5_8m	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

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

Block: 3 Year: 2014

Sort By: First Name

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

Session: DOL 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

Student Attendance:

Date	Attendance
9/2/2014	
16/2/2014	
23/2/2014	
2/3/2014	

Payments by Direct Debit: Yes

Next Payment Due: \$10.00

Cost of Booking:

Item	Amount
Initial Cost	\$100.00
Discount Applied	-\$10.00
Value of Free Lessons	
Exit Value Written Off	
Late Payment Fee	
Payments Received	-\$90.00
Balance Due	\$180.00

Payments Received:

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

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
File Edit View Insert Families Format Scripts Print Tools

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_8m	Penguin
Sam Smith	6_3m	Penguin
Nicholas Smith	6_3m	Turtles

Bookings

Date	Invt ID	Amt
25/01/18	147324	
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	
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	
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: ####-####-####

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

Withdraw funds using Bank Debit

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

BSB Missing

Payment Authority Held

Withdraw funds using Credit Card

Name: B G Smith
XXXX-1234
Exp: 0617

Card Expired 0617

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

Address

Email

OK to Email OK to SMS

Contact Details

Primary Contact Name

Other Contact Name

Emergency Contact Name

Phone (Hm) Phone (Mobile) Phone (Default)

Payment Details

Discount Rate

Discount Type

Payment Authority Held

Payment Type

Credit Card Expiry Date

Payment Details Missing

Referral & Exit

Custom Fields

First Swim Date

Last Swim Date

Total Family Bookings

Outstanding Balance

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

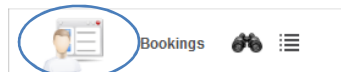
Take Payment by Credit Card Next Payment Due

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

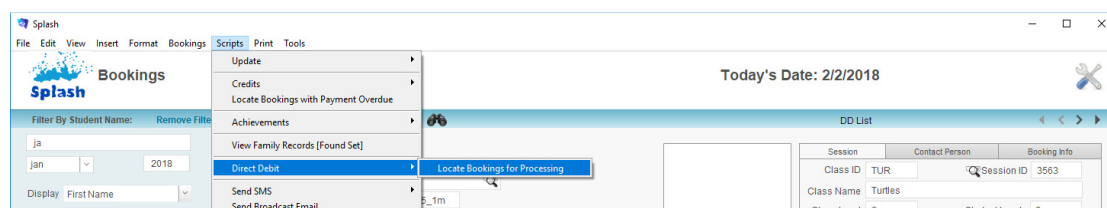
Locating Payments for Direct Debit Processing

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.

Locate Payments

Enter find criteria for payment processing.

Block
Feb

Year
2018

Cancel OK

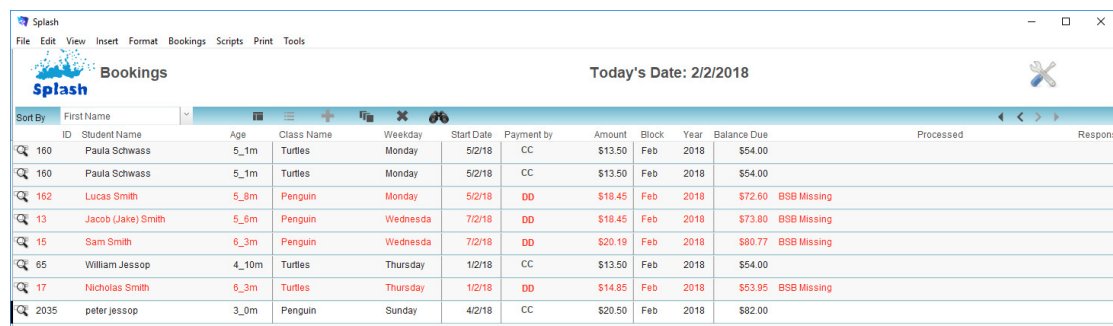
6. The Specify Debit Type dialog will be displayed on your screen. Select either CC or Bank.

Specify Debit Type

Are you requesting funds from Bank Accounts or Credit Cards?

Cancel CC 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.



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	\$72.50 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 peter jessop

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

Today's Date: 2/2/2018

Start Date

Payment by

Amount

Block

Year

Balance Due

Processed

Response

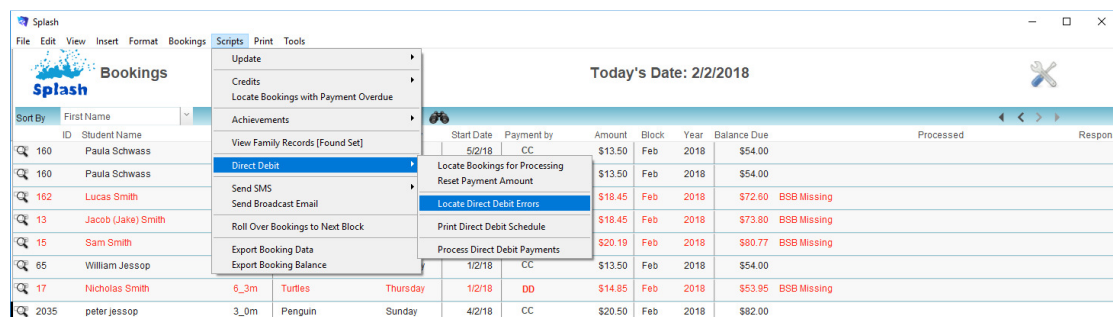
5/2/18	CC	\$13.50	Feb	2018	\$54.00		
		\$13.50	Feb	2018	\$54.00		
		\$18.45	Feb	2018	\$72.60	BSB Missing	
		\$18.45	Feb	2018	\$73.80	BSB Missing	
		\$20.19	Feb	2018	\$80.77	BSB Missing	
1/2/18	CC	\$13.50	Feb	2018	\$54.00		
1/2/18	DD	\$14.85	Feb	2018	\$53.95	BSB Missing	
4/2/18	CC	\$20.50	Feb	2018	\$82.00		

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.

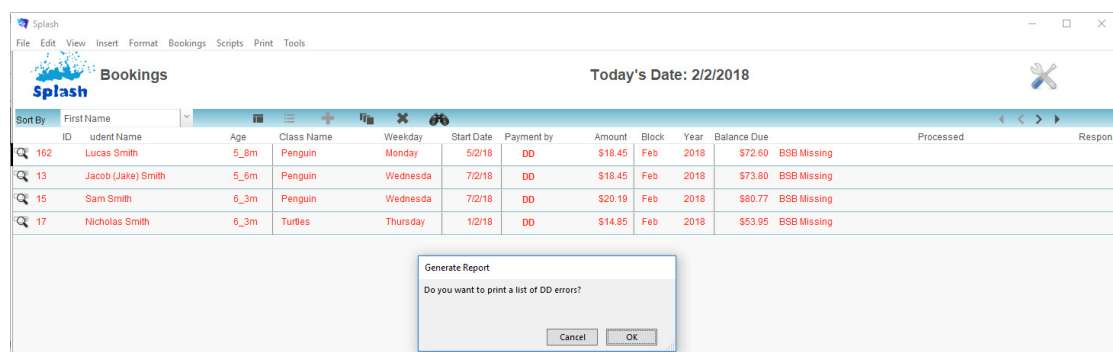
1. Ensure the Direct Debit list is displayed on your screen.
2. Choose **Direct Debit... Locate Direct Debit Errors** from the scripts menu.



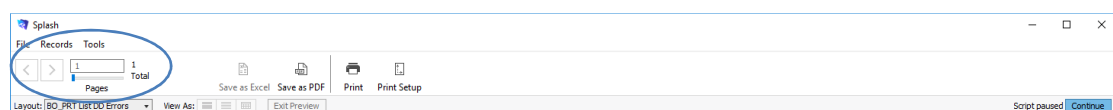
3. The Locate Payments dialog will be displayed on your screen. Enter the term and year for processing. Click the OK button.

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

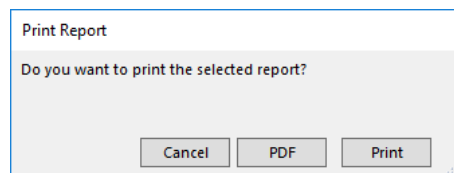


5. Click OK to preview the report or Cancel to return to the list of bookings.
6. If you have selected OK (above) the report will be previewed on your screen. The status panel (on the top of the screen) will enable you to view additional pages. When you have finished viewing the report click the **Continue** 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		\$72.60 BSB Missing
Nicholas Smith	Turtles	\$14.85		\$53.95 BSB Missing
Sam Smith	Penguin	\$20.19		\$80.77 BSB Missing
Total Due as at 2/2/2018		\$71.94		

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



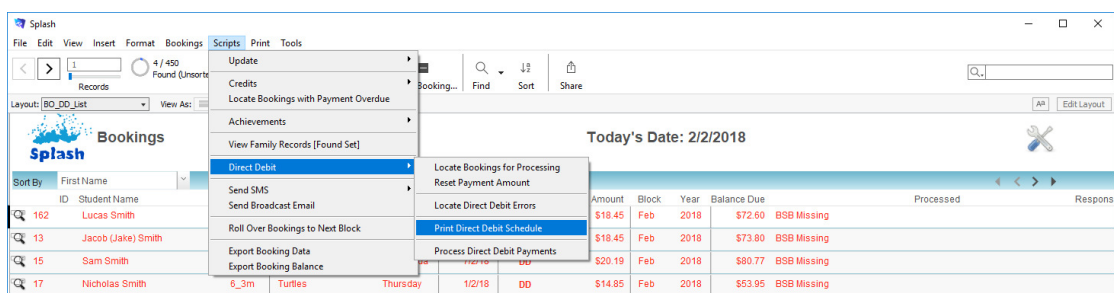
Printing the Direct Debit Schedule

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.

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



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



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

	Amount	Balance
Smith (Barbara Smith)		
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
Total Due as at 2/2/2018	\$71.94	

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

Print Report

Do you want to print the selected report?

Cancel PDF Print

Processing Your Direct Debit Payments

When all payments have been checked and errors removed you are ready to process your direct debit payments.

- 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... 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		

- 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' software interface. The top menu bar includes File, Edit, View, Insert, Format, Bookings, Scripts, Print, and Tools. The main window is titled 'Bookings' and displays 'Today's Date: 2/2/2018'. On the left, there is a 'Filter By Student Name' section with a search bar containing 'ja' and a list of students. The central area shows the details for a student named Paula Schwass, including her name, gender (Female), age (5_1m), medical history (Asthma), contact information (Robyn Schwass), and telephone number (0272222082). On the right, the 'DD List' (Direct Debit List) is displayed, showing session details for 'Turtles' class, including the instructor (Brian Roberts), location (Learners Pool), start date (5/2/2018), and end date (26/2/2018). At the bottom, the 'Cost of Booking' section shows the initial cost (\$60.00), discount applied (\$6.00), and the next payment due (\$13.50). A blue arrow points from the green dollar sign icon next to the 'Next Payment Due' field to the 'Take Payment by Credit Card' button.

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

Cost Method	Cost Per Session	Cost Unit	Initial Cost	Discount Applied	Balance Due
Cost Method	Cost Per Session	Cost Unit	\$15.00		\$60.00
Discount Rate	10	Type	Percent		\$6.00
Payment Required By	5/2/18				\$54.00
Payment Authority Held	Yes				\$13.50

Understanding the Diary

The Swim School Diary provides access to most features required in the day-to-day operation of the Splash system. It enables you to display the sessions for a selected block along with the related bookings. Inside the diary you have the ability to update attendance, update achievements, receive payments, and transfer students from one session to another.

Swim School Diary

This format provides the flexibility of being able to display all sessions for a defined weekday within a block in a specified year. You may also refine the list by selecting up to three class types.

The screenshot shows the 'Swim School Diary' window. On the left, a list of sessions is displayed for Monday, February 2018. The sessions include various classes like Turtles, Penguin, Jellyfish, and Seals, each with an instructor and a number of bookings. The main panel shows a detailed view for the 'Jellyfish @ 4:00 PM on Monday with David Smith' session. This panel includes fields for Session ID (3504), Class ID (JEL), Instructor (DS), Class Name (Jellyfish), Class Level (4), Max Size (6), Location (Main Pool), Start Date (5/2/2018), End Date (26/2/2018), and Shift (Afternoon). It also shows a list of students booked into the session, including debra Patterson, simon thomas, and william Smith, with their respective contact information and achievement icons.

Daily Grid

Unlike the Swim School Diary, the grid displays classes for all days of the week in one view. Display a list of who is booked into a class by hovering your cursor above the class name or by clicking directly on the required class. This view is not available for printing.

The screenshot shows the 'Swim School Diary - Class Grid' window. It displays a weekly overview of sessions for the year 2018. The grid shows sessions for Monday through Sunday, with columns for Start Time, Interval, Block, and Year. The sessions are color-coded by class type: Jellyfish (blue), Penguin (green), Turtles (yellow), Seals (orange), and Starfish (red). The grid allows users to view sessions for all days of the week in one view.

Class Grid

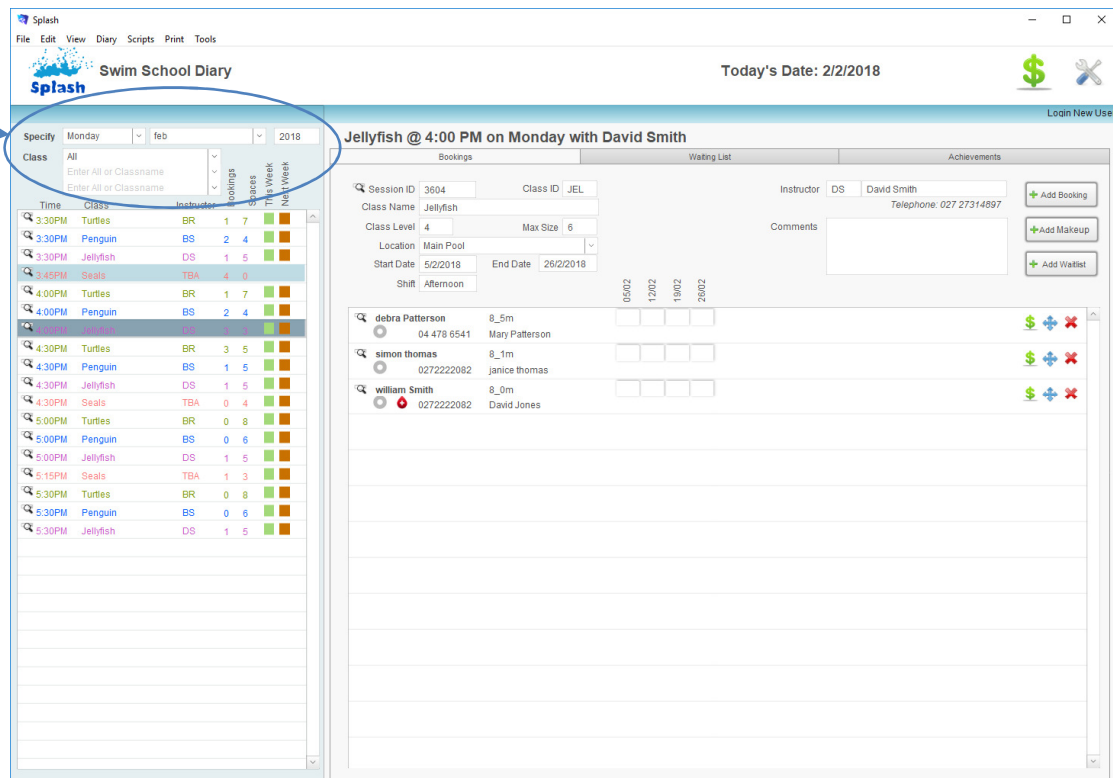
Unlike the other two options for display, the class grid displays all classes for a selected day and shift. This view shows the students booked into each session. Click once on the session display icon to display more detail for the selected class.

The screenshot shows the 'Splash Swim School Diary - Daily Grid' application. The main window displays a grid of classes for Monday, February 2, 2018. The classes are organized by time slots and pool. A modal window is open for the 'Turtles at 4:30 PM on Monday with Brian Roberts' class, showing a list of students, their attendance, and achievements.

Student	Attendance	Achievements	Waitlist
Joanne Jones	2_10m	0272222082	David Jones
Paula Schwass	5_1m	0272222082	Robyn Schwass
Peter Williamson	4_0m	0272222082	John Williamson

Working in the Swim School Diary

The content of Swim School Diary is based on three key fields; the day of the week, the block, and the year. In addition to these three fields you may also filter by Class.

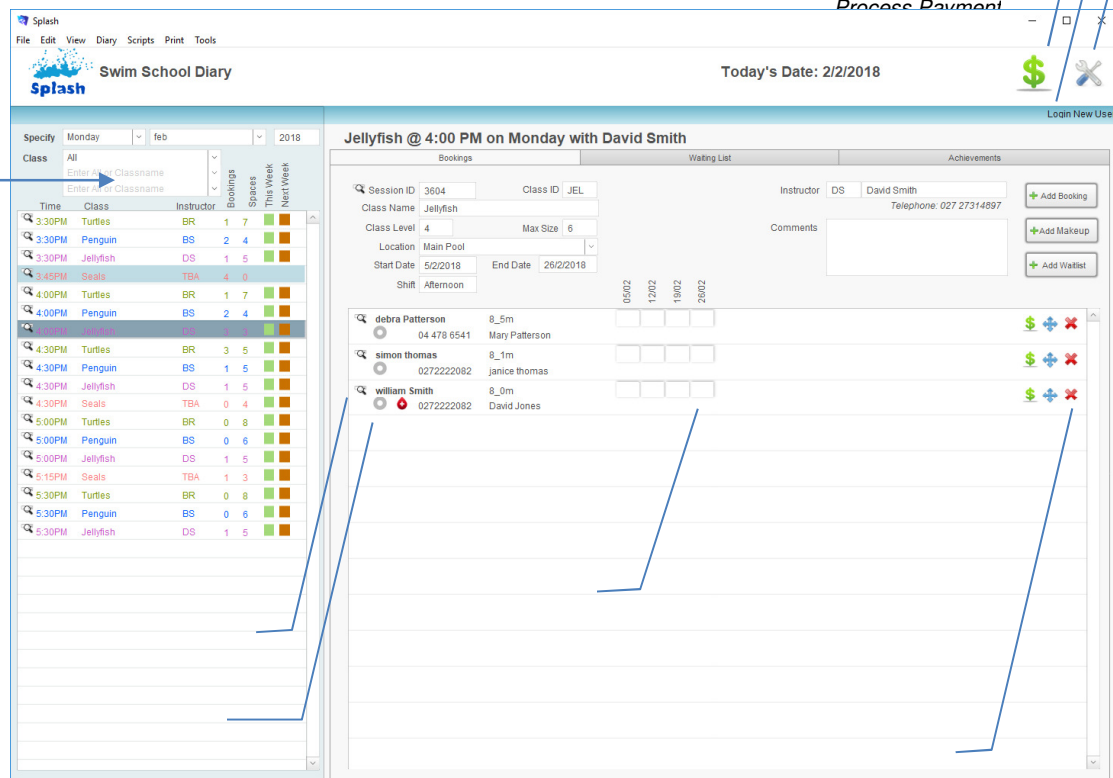


1. Select the **Weekday** you wish to view.
2. Select the **Block** you wish to view.
3. Select the **Year** you wish to view.
4. Select the specific Class(es) you wish to view (optional).

Login as a New User

View Preferences

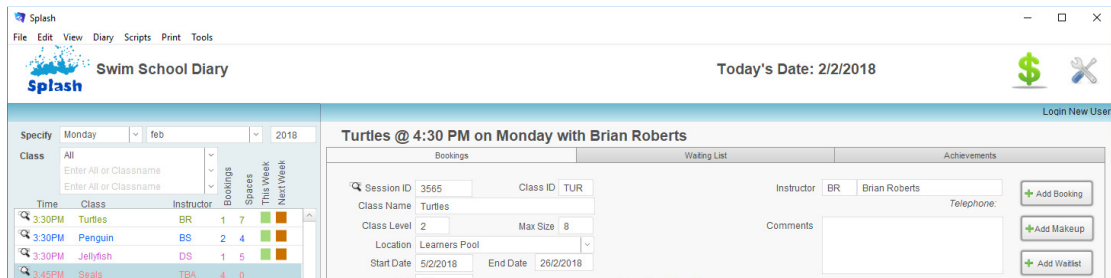
Process Payment



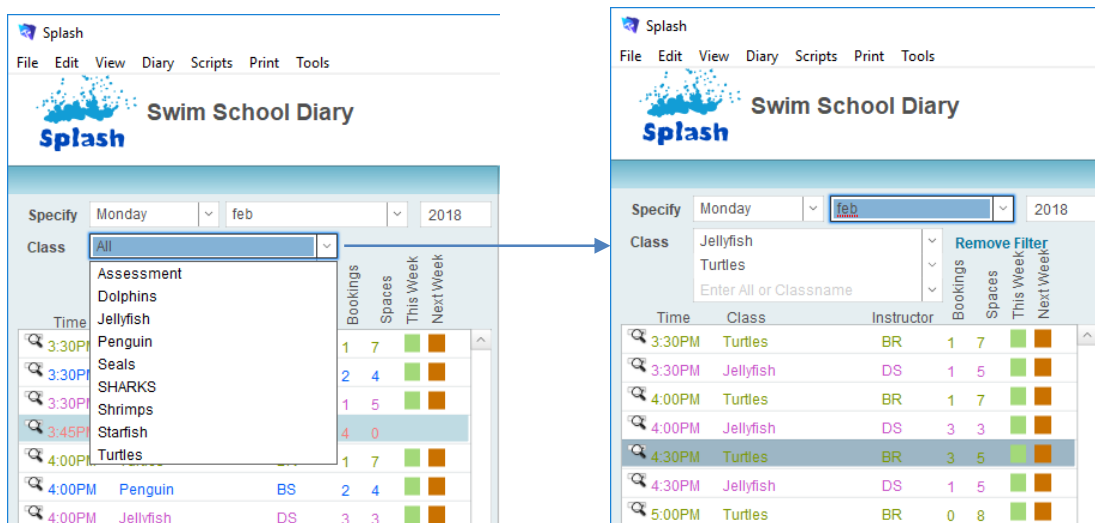
Filtering the Diary for Specific Classes

Rather than display the entire list of sessions you may elect to display sessions for a selected class type or multiple class types.

1. Ensure the Swim School Diary is displayed on your screen.
2. Select the required Day, Block and Year at the top of the diary screen.



3. Select the class you wish to display from the drop-down list provided.
4. Repeat step 3 until all the required classes are displayed.



Updating Session Details

Elements of the session can be updated within the diary. Updating session information here will automatically update the original session record and any active bookings.

Your ability to edit session information is dependent upon your access privileges. The Edit Session checkbox must be selected in your user account if you wish to update session information.

Viewing Bookings for a Session

1. Ensure the correct day, block and year are displayed at the top left of your screen.
2. Use the list on the left of your screen to click the class name for session you wish to display.
3. All bookings for the selected session will be displayed within the panel on the right of the screen.

The screenshot shows the 'Swim School Diary' application window. At the top, it says 'Today's Date: 2/2/2018'. On the left, there's a sidebar with a calendar view for Monday, February 2018. A list of classes is shown, including 'Seals' at 3:45 PM. The main panel displays the details for the 'Seals @ 3:45 PM on Monday with To Be Advised' session. It includes fields for Session ID (3560), Class ID (SEA), Instructor (TBA), and To Be Advised (027 2222084). There are also buttons for 'Add Booking', 'Add Makeup', and 'Add Waitlist'. A list of bookings is shown below, including names like Craig King, Hamish McDougal, Jack McArthur, and Paul Fairbrother, along with their contact information and booking status.

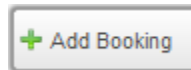
Creating a New Booking in the Diary

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, Block and Year at the top of the diary screen to locate the session you wish to book the student in to.
2. Use the list on the left of your screen to click the class name for the session you wish to book the student in to.

This screenshot shows the 'Swim School Diary' application window with the class selection process. The 'Specify' section shows 'Monday', 'feb', and '2018'. The 'Class' dropdown is set to 'All'. Below, a list of classes is displayed, including 'Seals' at 3:45 PM. The 'Seals' class is highlighted, indicating it is the selected session for booking.

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



4. Click once on the **Add Booking** button to display the **Select a Student** dialog. Your cursor will be flashing in the filter field.

A screenshot of the "Select a Student" dialog box. It has a title bar with a user icon and the text "Select a Student". Below the title bar, there is a text input field with the placeholder "Enter all or part of the student name to display fewer records. Select the family name from the list below...". To the right of the input field is a "Filter:" label and a search icon. The main area contains a table with student information. The table has columns for first name, last name, age, phone number, address, and animal. The row for "Williams Sam" is highlighted in red. At the bottom left is a "Cancel" button.

First Name	Last Name	Age	Phone	Address	Animal
Jessop	William	4_10m	04 478 3215	180 Essex St, Ngaio, Wellington 4007	Turtles
Smith	william	8_0m	0272222082	123 Any St, Wellington	Jellyfish
watkins	Jamie	4_10m			Jellyfish
White	Jane	7_2m	0272222082	76 Moorefield Road, Johnsonville, Wellington	Starfish
Williams	Benjamin	4_4m	0272222082	171 Chapel St, Khandallah, Wellington 4005	Turtles
Williams	Harry	4_9m	0272222082	171 Chapel St, Khandallah, Wellington 4005	Penguin
Williams	Jenny	5_2m	0272222082	171 Chapel St, Khandallah, Wellington 4005	Turtles
Williams	Sam	2_8m	0272222082	171 Chapel St, Khandallah, Wellington 4005	
Williams	Sarah	1_5m	0272222082	171 Chapel St, Khandallah, Wellington 4005	
Williamson	Peter	4_0m	0272222082	987 Essex St, Masterton 5886	Turtles
Wilson	James	4_1m	0272222082	123 Any St, Wellington 4000	Jellyfish

5. Begin typing either the student first name or last name (or part thereof) in the **Filter** box to display a list of all students who match the text entered. The list of students will be revised as you type.

A screenshot of the "Select a Student" dialog box, similar to the previous one, but with the "Filter:" box containing the letter "w". The table below shows only the students whose names start with "w": Jessop, Smith, watkins, White, Williams, and Wilson. The row for "Williams Sam" is still highlighted in red.

First Name	Last Name	Age	Phone	Address	Animal
Jessop	William	4_10m	04 478 3215	180 Essex St, Ngaio, Wellington 4007	Turtles
Smith	william	8_0m	0272222082	123 Any St, Wellington	Jellyfish
watkins	Jamie	4_10m			Jellyfish
White	Jane	7_2m	0272222082	76 Moorefield Road, Johnsonville, Wellington	Starfish
Williams	Benjamin	4_4m	0272222082	171 Chapel St, Khandallah, Wellington 4005	Turtles
Williams	Harry	4_9m	0272222082	171 Chapel St, Khandallah, Wellington 4005	Penguin
Williams	Jenny	5_2m	0272222082	171 Chapel St, Khandallah, Wellington 4005	Turtles
Williams	Sam	2_8m	0272222082	171 Chapel St, Khandallah, Wellington 4005	
Williams	Sarah	1_5m	0272222082	171 Chapel St, Khandallah, Wellington 4005	
Williamson	Peter	4_0m	0272222082	987 Essex St, Masterton 5886	Turtles
Wilson	James	4_1m	0272222082	123 Any St, Wellington 4000	Jellyfish

6. Click once on the line that contains the name, age and address of the student you wish to add to the class.
7. The Enter New Booking dialog will be displayed on your screen. The student and session details will be completed for you.

2. Use the list on the left of your screen to select the session you wish to update.

The screenshot shows the Splash Swim School Diary interface. On the left, a list of sessions is displayed, with 'Seals' selected. The right panel shows the details for the 'Seals @ 3:45 PM on Monday with To Be Advised' session. The session details include Session ID 3444, Class ID SEA, Class Name Seals, Class Level 6, Max Size 4, Location Main Pool, Start Date 8/1/2018, End Date 29/1/2018, and Shift Afternoon. The instructor is TBA. The right panel also shows a list of bookings with columns for Session ID, Class Name, Class Level, Location, Start Date, End Date, Shift, and a grid of attendance codes (P, NA, A, C, PH) for different dates.

3. All bookings for the selected session will be displayed in the panel on the right of the screen.

This screenshot is identical to the one above, showing the same interface and session details.

4. Update attendance by choosing the appropriate attendance code from the drop-down menu displayed for the required date.

NB: See the Bookings User Guide for instructions on updating attendance in bulk.

Booking a Catchup/Makeup Lesson

Catchup lessons can only be created from the diary. Bookings can only be made in a session that has vacancies. If the class has future catchups scheduled (which makes the class full on those dates) you may be unable to enter additional bookings.

1. Select the required Day, Block and Year at the top of the diary screen to display the session you want to book the student in.
2. Use the panel on the left of your screen to select the session you would like to book a catchup lesson for.
3. All bookings for the selected session will be displayed in the panel on the right of your screen.

Splash Swim School Diary Today's Date: 2/2/2018

Specify: Monday Feb 2018

Class: All

Time	Class	Instructor	Bookings	Spaces	This Week	Next Week
3:30PM	Turtles	BR	1	7		
3:30PM	Penguin	BS	2	4		
3:30PM	Jellyfish	DS	1	5		
3:45PM	Seals	TBA	4	0		
4:00PM	Turtles	BR	1	7		
4:00PM	Penguin	BS	2	4		
4:00PM	Jellyfish	DS	3	3		
4:30PM	Turtles	BR	3	5		
4:30PM	Penguin	BS	1	5		
4:30PM	Jellyfish	DS	1	5		
4:30PM	Seals	TBA	0	4		
5:00PM	Turtles	BR	0	8		
5:00PM	Penguin	BS	0	6		
5:00PM	Jellyfish	DS	1	5		
5:15PM	Seals	TBA	1	3		
5:30PM	Turtles	BR	0	8		
5:30PM	Penguin	BS	0	6		
5:30PM	Jellyfish	DS	1	5		

Turtles @ 4:30 PM on Monday with Brian Roberts

Session ID: 3565 Class ID: TUR Instructor: BR Brian Roberts

Class Name: Turtles Class Level: 2 Max Size: 8

Location: Learners Pool Start Date: 5/2/2018 End Date: 26/2/2018 Shift: Afternoon

Comments:

Waiting List:

Achievements:

Joanne Jones 0272222082 2_10m David Jones

Paula Schwass 0272222082 5_1m Robyn Schwass

Peter Williamson 0272222082 4_0m John Williamson

Buttons: Add Booking, Add Makeup, Add Waitlist

- Click once on the **Add Catchup/Makeup** button to display the **Select a Student** dialog.

Select a Student

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

Filter:

Smith	Jacob	5_6m	0272222082	6A Erlestoke Crescent, Churton Park,	Penguin
Smith	Jason	6_5m	0272222082	89 Roberta Road, Tawa 4008	Turtles
Smith	Jennifer	2_9m	0272222082	89 Roberta Road, Tawa 4008	Turtles
Smith	John	5_8m	0272222082	89 Roberta Road, Tawa 4008	
Smith	Lucas	5_8m	0272222082	6A Erlestoke Crescent, Churton Park,	Penguin
Smith	Nicholas	6_3m	0272222082	6A Erlestoke Crescent, Churton Park,	Turtles
Smith	Phillip	6_2m	0272222082	89 Roberta Road, Tawa 4008	Penguin
Smith	Sam	6_3m	0272222082	6A Erlestoke Crescent, Churton Park,	Penguin
Smith	William	8_0m	0272222082	123 Any St, Wellington	Jellyfish

Buttons: Cancel

- Begin typing either the student first name or last name to display a list of all students with a matching name. The list will be revised as you type.
- Click once on the line, which contains the student name, age, and address you wish to book the catchup for.
- The Enter New Catchup Details dialog will be displayed on your screen. The student and session details will be completed for you.

Create New Booking

Enter New Catchup Details

Must Pay at Time of Booking

Jason Smith
 89 Roberta Road, Tawa 4008
 Telephone: 0272222082

Age: 6_5m Gender: Male

Has been booked in to **Turtles** lessons on **Monday** at **4:30 PM** with **Brian Roberts**

Start Date

Comment

8. Update the **Start Date** to display the date the catchup lesson is being taken.

9. Click the **Done** button to save the booking and return to the diary screen.

NB: An “Active” catchup lesson will appear in green text. A catchup is regarded as active if the date of the catchup is within 7 days of the current date. Students entered for catchup lessons will automatically appear on printed listings while they are active. The status of a catchup lesson will revert to “Exited” when outside the active timeframe. A past catchup is displayed in red text, while a future catchup is displayed in orange text.

Identifying Upcoming Spaces for Catchups/Makeups

Upcoming spaces for either this week or next week are represented as green and oranges boxes in the diary. Simply click the box to create a catchup/makeup lesson.

- A green box represents a space this week,
- An orange box represents a space next week.

Splash

File Edit View Diary Scripts Print Tools

Swim School Diary Today's Date: 2/2/2018

Specify Monday Feb 2018

Class All

Enter All or Classname

Enter All or Classname

Time	Class	Instructor	Bookings	Spares	This Week	Next Week
3:30PM	Turtles	BR	1	7		
3:30PM	Penguin	BS	2	4		
3:30PM	Jellyfish	DS	1	5		
3:45PM	Seals	TBA	4			
4:00PM	Turtles	BR	1	7		
4:00PM	Penguin	BS	2	4		
4:00PM	Jellyfish	DS	3	3		

Turtles @ 4:30 PM on Monday with Brian Roberts

Bookings Waiting List Achievements

Session ID 3555 Class ID TUR

Class Name Turtles

Instructor BR Brian Roberts Telephone:

Class Level 2 Max Size 8

Location Learners Pool

Start Date 5/2/2018 End Date 26/2/2018

Shift Afternoon

Comments

Joanne Jones *2_10m

0272222082 David Jones

Updating Student Achievements

Student achievements can be updated from either the diary, the booking record or from the iPad. Each row in the achievement portal contains four fields:

The Goal – displays a description of the goal a student is working towards.

Progress Status – contains a drop-down list of possible stages in respect to the swimmers progress towards the selected goal. The menu may be changed within your preferences.

Comments – a free text field that enables you to enter any comments about the students' progress towards the selected goal.

Date of Completion – the date of completion should be completed when a child has successfully demonstrated the assigned task.

1. Select the required Day, Block and Year at the top of the diary screen.
2. Use the list on the left of your screen to select the session you wish to update.
3. Click the achievement tabcard.

The screenshot shows the 'Splash Swim School Diary' application. The top header includes the 'Splash' logo, a menu bar (File, Edit, View, Diary, Scripts, Print, Tools), and 'Today's Date: 2/2/2018'. The left sidebar contains a 'Specify' section with dropdowns for 'Monday', 'Feb', and '2018', followed by a 'Class' dropdown set to 'All'. Below this is a list of classes with columns for Time, Class, Instructor, Bookings, Spaces, This Week, and Next Week. The main content area has three tabs: 'Bookings', 'Waiting List', and 'Achievements'. The 'Achievements' tab is selected, and a blue arrow points to it from the 'Achievements' tab label. The 'Current Bookings' table lists students: Joanne Jones (2_10m), Paula Schwass (5_1m), Peter Williamson (4_0m), and Jason Smith (6_5m), all with Level: TURTLES. Below this, the 'Displaying Goals for: Joanne Jones (Last Goal Achieved)' section shows four goals: 1. Happy in the water (Mastered), 2. Blowing bubbles and eyes under (Learning), 3. Front star float (Introduced), and 4. Torpedo (Goal Status). Each goal has a progress bar and a 'Date Achieved' field.

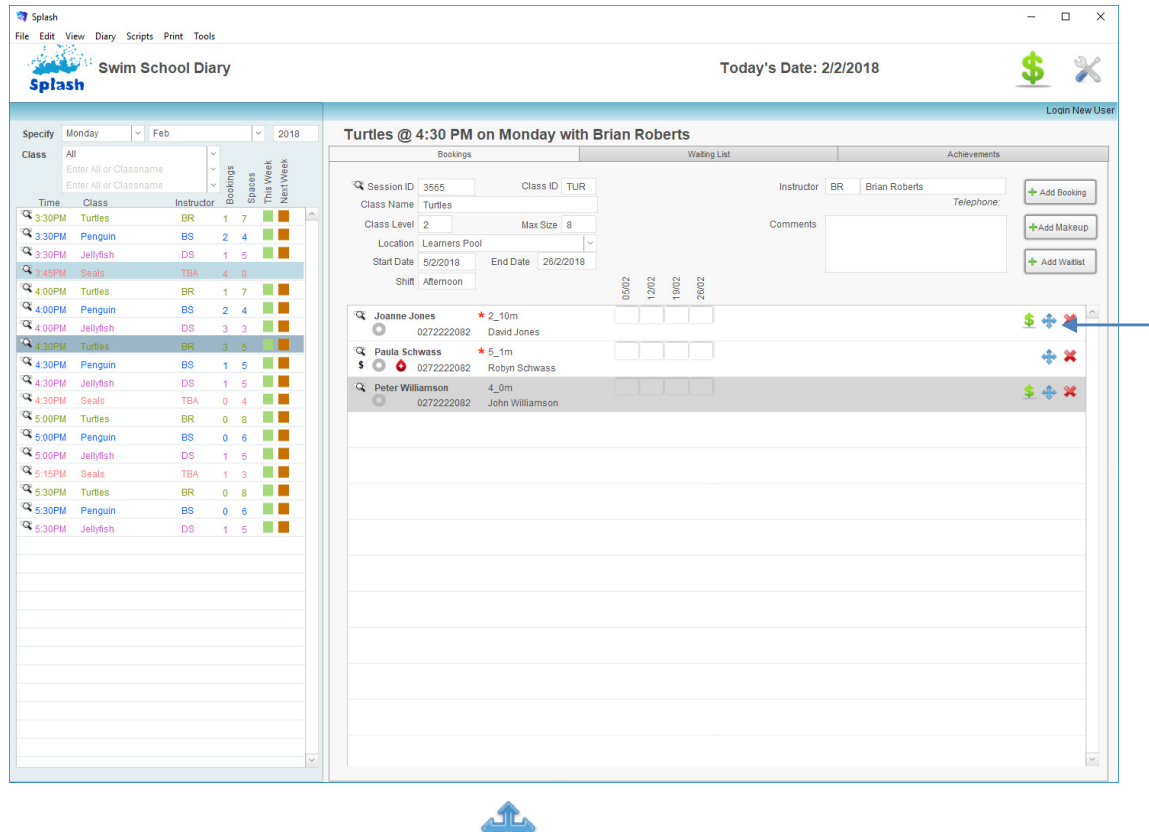
4. A list of all students in the selected session will be displayed on the top right of your screen.
5. Click once on each student name to display their progress towards goals..
6. Update assessment details for each goal as required.

This close-up screenshot focuses on the 'Achievements' tab. It shows the 'Current Bookings' table with the same student list as the previous screenshot. Below it, the 'Displaying Goals for: Joanne Jones (Last Goal Achieved)' section is visible. A blue arrow points from the 'Joanne Jones' name in the bookings table to the goal list, indicating the action of clicking a student name to view their progress.

Transferring the Student to Another Session

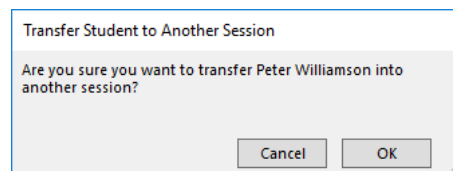
Use the transfer command to move a student from one session to another, this command should be used when you do not need to keep a record of the original booking. If you wish to keep a record of the original booking, use the Exit process and rebook the child in a new session.

1. Select the required Day, Block and Year at the top of the diary screen.
2. Use the list on the left of your screen to select the session you wish to update.
3. Locate the booking you wish to move.

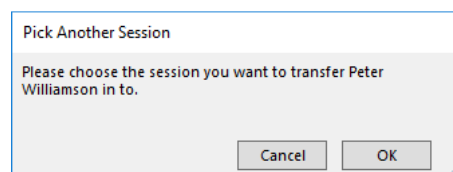


Click the  button to move the student to another class

4. Click once on the transfer button displayed to the right of the booking record.
5. You will be asked to confirm your request to move the selected student to another class.



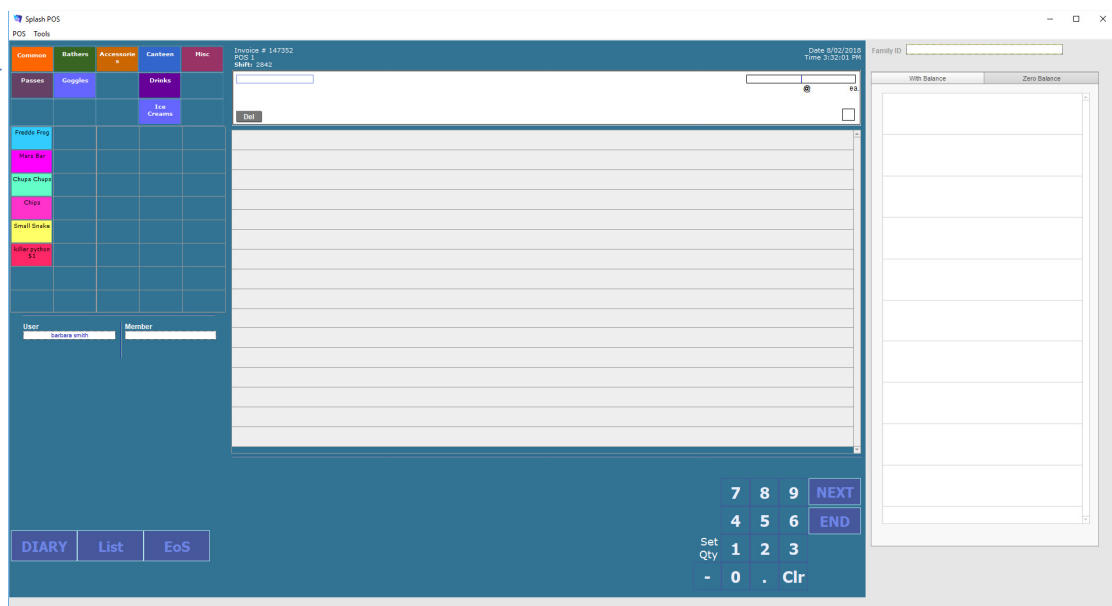
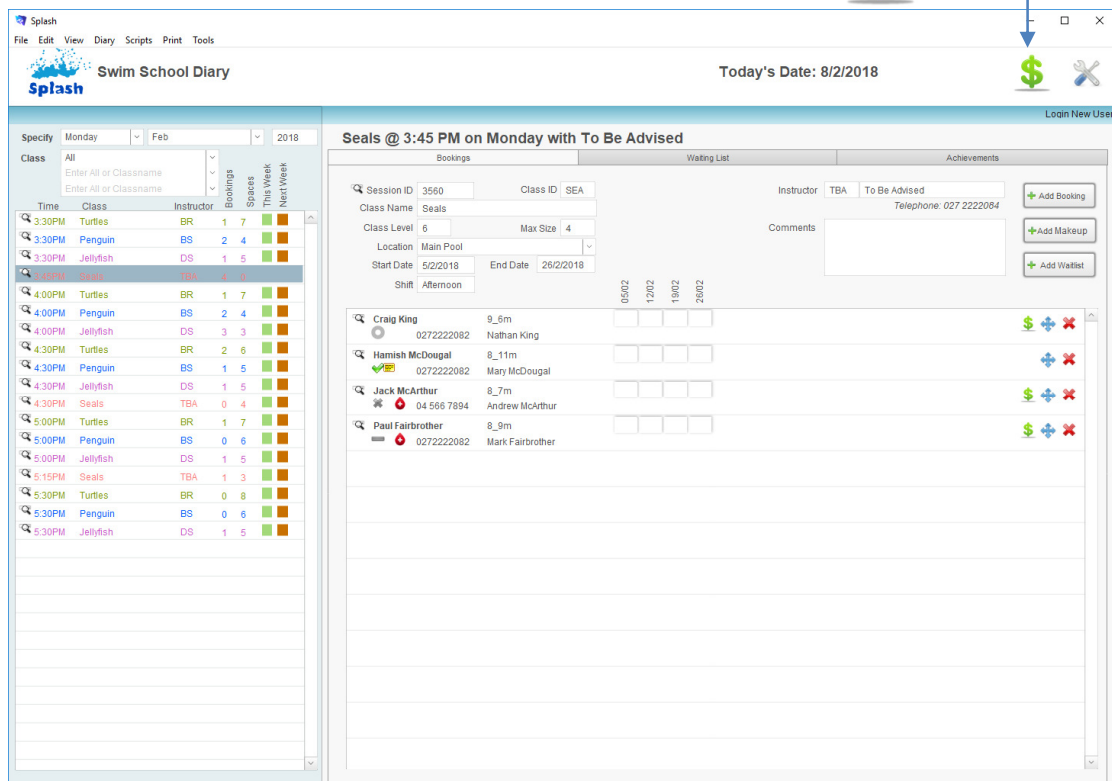
6. You will be prompted to select the session you would like to move the student into.



7. Display the new session details on your screen by updating the Day, Block and Year settings at the top of the diary screen.
8. Click once on the session you wish to move the student in to.

Processing a Payment

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the window.



3. The POS interface will be displayed on your screen.
4. Use the panel on the top left of the screen to select the category which contains the button for the item being sold.

Common	Bathers	Accessories	Canteen	Misc
Passes	Goggles		Drinks	
			Ice Creams	

5. Click once on the product you wish to include in your sale.

Freddo Frog				
Mars Bar				
Chupa Chups				
Chips				
Small Snake				
killer python \$1				

6. The item you have selected will move across to the Sale Item box

Splash POS
POS Tools

Invoice # 147352
POS 1
Shift: 2842
Date 8/02/2018
Time 3:32:01 PM
Family ID

Common Bathing Accessories Canteen Misc
Passes Goggles Drinks Ice Creams

Freddo Frog
Mars Bar
Chupa Chups
Chips
Small Snake
killer python \$1

1 Snakes Alive @ \$0.10 ea
\$0.10

Del

User: barbara smith Member

DIARY List EoS

Set Qty: 7 8 9 NEXT
4 5 6 END
1 2 3
- 0 . Clr

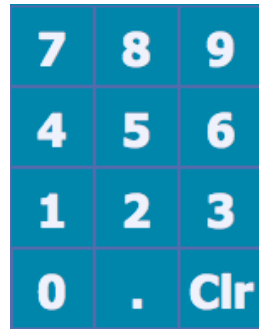
With Balance Zero Balance

Invoice # 147352
POS 1
Shift: 2842
Date 8/02/2018
Time 3:32:01 PM

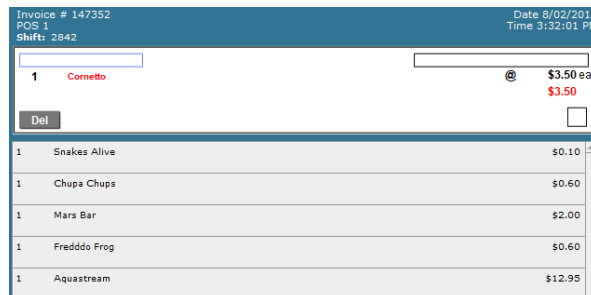
1 Snakes Alive @ \$0.10 ea
\$0.10

Del

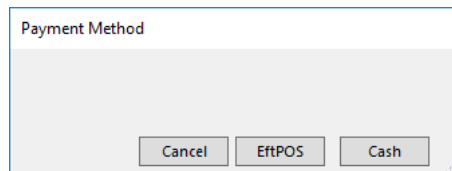
7. If you are selling multiple items of the same product click the **Clr** button, then select the actual quantity being sold.



8. Repeat steps 4 through 7 until all products have been define for the sale.
9. As you enter additional items they will move further down the scree within the sale items area of the screen.



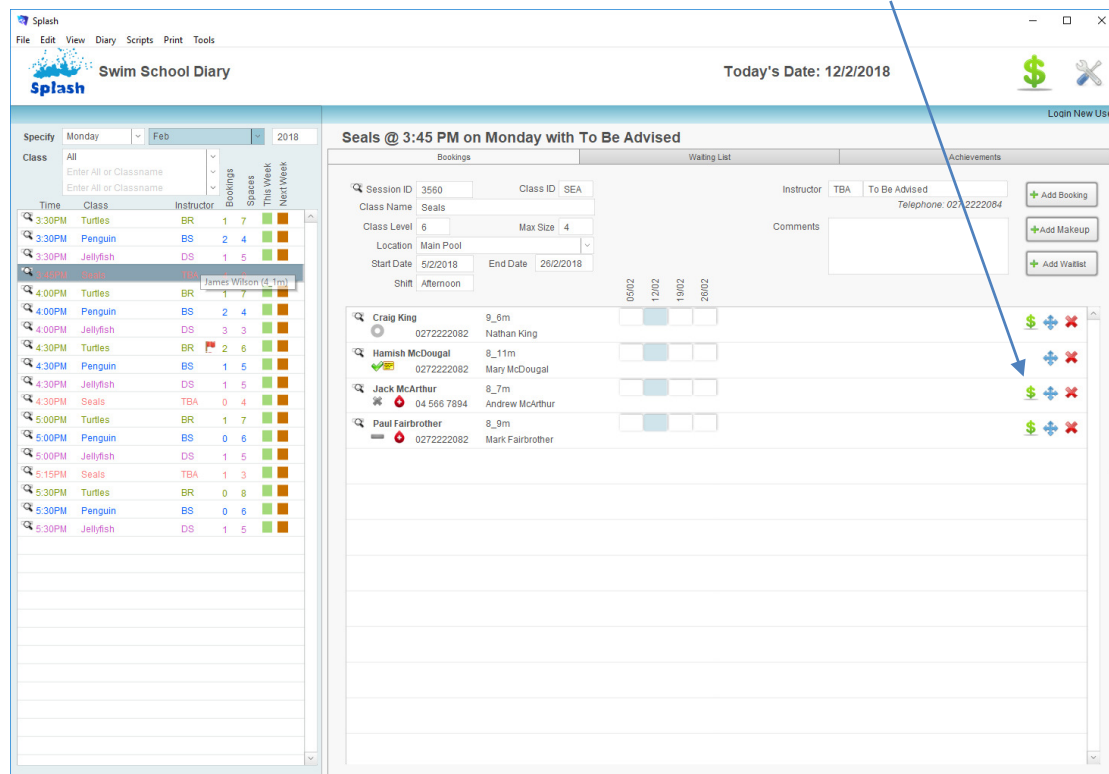
10. When all items have been defined, click the **END** button.
11. You will be asked to define the payment method for the selected sale. Choose EftPOS or Cash to complete the sale and return to the POS screen. Click Cancel to export the dialog box without completing the sale.



Entering a Quick Sale for a Booking

Clicking the green dollar symbol displayed within the booking line triggers a quick sale for the selected booking. After selecting the dollar sign a sale will be created, the family will be selected and the selected booking information will be added to the sale.

1. Ensure the Diary is displayed on your screen.
2. Click the \$ displayed in the row for the booking you wish to pay.



3. The POS interface will be displayed on your screen.
4. The selected booking will be moved to the sale item portal and all bookings for the selected family will be displayed in the panel on the right of the screen.

Splash POS
POS Tools

Common Bathing Accessories Canteen Misc
Passes Goggles Drinks Ice Creams

Invoice # 147371
POS 1
Shift: 2842
Date: 12/02/2018
Time: 11:30:11 PM
Andrew McArthur

Family ID: 23
MCARTHUR (Andrew McArthur)

With Balance Zero Balance

Jack McArthur
Seals - 3:45 PM Mon (Term Jun 2017) \$54.00

Jack McArthur
Seals - 3:45 PM Mon (Term Jul 2017) \$90.00

Jack McArthur
Seals - 3:45 PM Mon (Term Aug 2017) \$72.00

Jack McArthur
Seals - 3:45 PM Mon (Term Sep 2017) \$72.00

Jack McArthur
Seals - 3:45 PM Mon (Term Oct 2017) \$72.00

Jack McArthur
Seals - 3:45 PM Mon (Term Nov 2017) \$72.00

Jack McArthur
Seals - 3:45 PM Mon (Block Dec 2017) \$54.00

Jack McArthur
Seals - 3:45 PM Mon (Block Jan 2018) \$54.00

Melanie McArthur
Penguin - 3:30 PM Wed (Block Jan 2018) \$72.00

Melanie McArthur
Penguin - 3:30 PM Wed (Block Feb 2018) \$72.00

Percent Disc 10

\$22.00 ea
\$22.00

Del

User: barbara smith Member: 23 Andrew McArthur

DIARY List EoS

7 8 9 NEXT
4 5 6 END
Set Qty 1 2 3
- 0 . Clr

5. Select additional bookings or amend the payment amount of the existing item.
6. When all items for the sale have been selected, click the END or NEXT button to complete the sale.



Defining Alternative Payment Methods

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the window.



Splash POS
POS Tools

Common Bathing Accessories Canteen Misc
Passes Goggles Drinks Ice Creams

Invoice # 147352
POS 1
Shift: 2842
Date: 8/02/2018
Time: 3:32:01 PM

Family ID:
MCARTHUR (Andrew McArthur)

With Balance Zero Balance

Snakes Alive

\$0.10 ea
\$0.10

Del

User: barbara smith Member:
Andrew McArthur

DIARY List EoS

7 8 9 NEXT
4 5 6 END
Set Qty 1 2 3
- 0 . Clr

3. The POS interface will be displayed on your screen.

- Click once in the Family ID field on the right of the screen.
- The Select Family dialog will be displayed on your screen. Enter the family name (or part thereof) in the filter field. The content of the list will be revised as you type.

Select a Family

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

Filter:

Smith	Unknown	0272222082		
Smith	Bridget	0272222082	1243 Any Street, Wellington	
Smith	Barbara	0272222082	6A Erlestoke Crescent, Churton Park, Wellington 4001	Jacob, Sam, Nicholas, Lucas
Smith	Daniel	0272222082	89 Roberta Road, Tawa 4008	Jason, Philip, Jennifer, John

- When you have identified the correct family simply click anywhere within the required row.
- You will be returned to the POS screen, all existing bookings for the selected family will be displayed in the panel on the right of the screen. This area is displayed in two cards ; with balance and zero balance.

Splash POS
POS Tools

Common Bathers Accessories Canteen Misc
Passes Goggles Drinks
Freddie Frog
Mara Bar
Chupa Chups
Chips
Small Snake
killer python \$1

User:
Member:
Barbara Smith

Invoice # 147353
POS 1
Shift: 2842
Date: 8/02/2018
Time: 3:39:53 PM
Barbara Smith

Family ID:
SMITH (Barbara Smith)

With Balance Zero Balance

Lesson	Barcode	Price
1 Nicholas Smith - Turtles - 11:00 AM Thu (Term Sep 2017)		\$59.40 ea \$59.40
1 Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block Aug 2017)		\$73.80
1 Lucas Smith - Penguin - 4:30 PM Mon (Term Aug 2017)		\$72.00
1 Nicholas Smith - Turtles - 11:00 AM Thu (Term Aug 2017)		\$74.25
1 Lucas Smith - Penguin - 4:30 PM Mon (Term Sep 2017)		\$72.00

Set Qty: 1 2 3
- 0 . Clr

DIARY List EoS

\$351.45

NEXT

END

NEXT

- Click once on the booking you wish to process a payment for. The booking details will be copied to the sale item area of the screen.
- Repeat step 8 until all bookings have been defined for the sale.
- When all bookings and products have been defined for the sale, click the **Next** button to define the method of payment.
- The End Sale dialog will be displayed on your screen.

Splash POS

Payment Method Amount Invoice # 147177 Date 3/02/2015
POS 1 2842 Time 1:31:44 PM
Sam Brown

DEL	CreditCard	2842	259.5
DEL			

Total: \$259.50
Change: \$0.00

CASH	EFTPOS	CREDIT CARD
GIFT VOUCHER	CHEQUE	AMEX
INTERNET	MANAGEMENT	PROMO
DIRECT DEBIT	SESSION PASS	JOURNAL

1	Missile Goggles	\$30.00
1	Celia Brown - Turtles - 9:30 AM Tue (Term 1 2014)	\$135.00
1	Celia Brown - Turtles - 9:00 AM Sun (Term 2 2014)	\$94.50

Total : \$259.50

\$5	7	8	9	BACK
\$10	4	5	6	END
\$20	1	2	3	
\$50	0	.	Clr	

DIARY List EoS

12. Choose the payment method by clicking the appropriate payment buttons on the left of your screen.

CASH	EFTPOS	CREDIT CARD
GIFT VOUCHER	CHEQUE	AMEX
INTERNET	MANAGEMENT	PROMO
DIRECT DEBIT	SESSION PASS	JOURNAL

13. Payments may be split across multiple payment types. Simply select the required method of payment and update the amount being paid for each selection.

DEL	CreditCard	2842	\$200.00
DEL	Cash	2842	151.45
DEL			

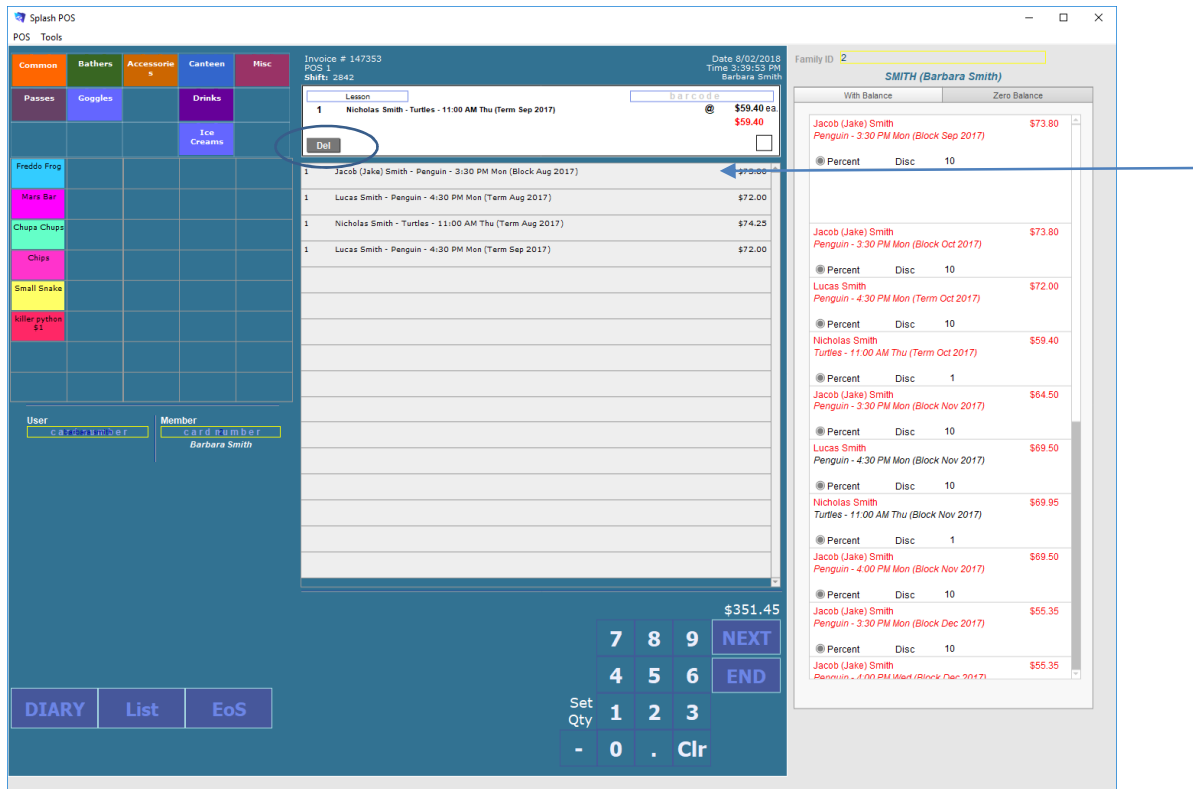
END

14. To complete the sale, click the **End** button.

15. Complete the sale by clicking the **End** or **Next** button.

Removing an Item from the Sale

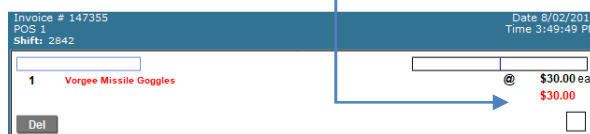
An item may be deleted from the sale while it is displayed at the top of the sale item screen. If the item you wish to remove is not displayed at the top of the list, simply click on it to return it to the top. An item cannot be removed from the sale after the sale has been completed.



1. Ensure the item you wish to remove is displayed in the sale item area at the top of the screen.
2. If the item is not displayed at the top of the list, simply click the required item.
3. Click the **Del** button
4. Complete your sale by clicking the End or Next button.

Discounting a Sale Item

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the screen.
3. The POS interface will be displayed on your screen.
4. Select the product you wish to sell.
5. A discount can be applied to an item while it is displayed at the top of the sale item list.
6. Click the Discount box at the right of the sale item screen to display the Staff Discount screen.



Thursday, 8 February 2018 3:51pm User

Invoice Number: 147355

STAFF DISCOUNT

STAFF DISCOUNT

VIP

MANAGEMENT

\$1 OFF

POS 1

Item Name
Vorgee Missile Goggles

Quantity
1

Item Price/Payment Amount
\$30.00

Admend Price
\$29.00

Amount Applied (per item)
\$1.00

Cancel Commit

7. Either click an existing discount button or enter the amended price on the right of the screen.
8. Click Commit to return to your sale screen.
9. A cross will be displayed in the discount box when an item has been discounted.

1	Vorgee Missile Goggles	Barcode	@	\$29.00 ea
Del				\$29.00

10. Complete your sale by clicking the **End** or **Next** button.

NB: A history of all discounts is recorded in the Discounts area of Splash POS.

Applying a Part Payment to a Booking

Part payments are only available for bookings. Products must be paid in full at the time of purchase.



1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the screen.
3. The POS interface will be displayed on your screen.
4. Select the booking you wish to process a payment for.
5. A part payment can only be defined while the booking appears in the sale item area at the top of the list.
6. Click the unit price written in black.



7. The Part Payment of Booking dialog will be displayed on your screen.
8. Enter the amount of the payment you would like to apply and click OK.

9. The booking will be displayed with a revised unit price..



10. Repeat steps 4 through 9 until all relevant bookings have been selected.
11. Complete your sale by clicking the **End** or **Next** button.

NB: The above command does not reduce the price of the initial booking, it simply applies a part payment to the outstanding balance.

Managing the Waiting List

Adding a Student to a Waiting List

1. Select the required Day, Block and Year at the top of the diary screen.
2. Use the list on the left of your screen to select the session you wish to update.
3. Click the **Waiting List** tabcard. All students wait listed for the selected session will be displayed on the lower right corner of your screen.

The screenshot shows the 'Splash Swim School Diary' interface. On the left, a list of sessions is displayed for Friday, February 2018. The 'Starfish @ 9:15 AM' session is selected. The main area shows the session details for 'Starfish @ 9:15 AM on Friday with Lisa Wilson'. The 'Waiting List' tab is active, showing a list of students waiting for the session. The 'Add Waitlist' button is visible in the bottom right corner of the waiting list section.

4. Add a new student to the waiting list by clicking the **Add Waitlist** button.

The screenshot shows a close-up of the 'Waiting List' dialog box. The 'Add Waitlist' button is highlighted, and a blue arrow points to it from the previous step.

5. The Select a Student dialog will be displayed on your screen. Your cursor will be flashing in the Filter field.
6. Begin typing either the first name or the surname of the swimmer you wish to waitlist. The list will be revised as you type.
7. Click once on the line containing the name of the student you wish to add to the waiting list.

The screenshot shows the 'Select a Student' dialog box. It contains a search filter field with the text 'h' and a list of students. The list is filtered to show students whose names start with 'h'.

Name	Age	Phone	Address	Class
Hargreaves Gregory	6_7m	0272222082	24 lane St, Wallaceville, Upper Hutt 5014	Starfish
Hargreaves Jessica	4_9m	0272222082	24 lane St, Wallaceville, Upper Hutt 5014	Jellyfish
Harper Amelia	1_6m	0272222082	76 Colombo Road, Tawa, Wellington 4010	
Harper Annabelle	2_5m	0272222082	45 Whangaehu Valley Rd, Masterton 5886	
Harper Robert	5_9m	0272222082	76 Colombo Road, Tawa, Wellington 4010	Turtles
Hughson Hayden	6_0m	0272222082	98 Barrett St, Ngaio, Wellington 4007	Turtles
Hughson Stephanie	3_10m	0272222082	98 Barrett St, Ngaio, Wellington 4007	Jellyfish
McDougal Hamish	8_11m	0272222082	118 South St, Newlands, Wellington 4006	Seals
Williams Harry	4_9m	0272222082	171 Chapel St, Khandallah, Wellington 4005	Penguin

8. The **Enter New Wait List** dialog will be displayed on your screen.

Create New Wait List

Enter New Waitlist

Name: Gregory Hargreaves
 Telephone: 0272222082
 Address: 24 lane St, Wallaceville, Upper Hutt 5014
 Age: 6_7m Gender: Male

Class ID: STA Session ID: 3578
 Class Name: Starfish
 Instructor: Lisa Wilson

Start Time: 9:15 AM Block: Feb
 Weekday: Friday Year: 2018

Notes:

Current Booking: Currently booked in Starfish on Tuesday at 5:00 PM with Harry Sims

Cancel Done

9. Enter any additional comments and click the **Done** button to return to the diary.

Transferring a Student from the Waiting List to the Session

1. Select the required Day, Block and Year at the top of the diary screen.
2. Select the session containing the waitlist by clicking on the waiting list icon in the left panel on your screen.

Specify: Friday Feb 2018

Class: All
 Enter All or Classname
 Enter All or Classname

Time	Class	Instructor	Bookings	Spaces	This Week	Next Week
8:30AM	Penguin	TBA	1	5		
8:45AM	Jellyfish	LW	1	5		
9:00AM	Turtles	TBA	0	8		
9:15AM	Starfish	LW	1	3		
9:30AM	Turtles	TBA	0	8		
10:00AM	Turtles	TBA	0	8		
10:00AM	Seals	LW	2	2		
10:30AM	Penguin	TBA	0	6		
10:45AM	Starfish	LW	0	4		
11:00AM	Penguin	TBA	2	4		
11:30AM	Penguin	TBA	0	6		

3. You will be taken to the waitlist screen. All students wait listed for the selected session will be displayed on the lower right corner of your screen.
4. Click the four directional arrow to the right of the student name in the wait list.

Splash Swim School Diary

Today's Date: 9/2/2018

Specify: Friday, Feb, 2018

Class: All

Time Class Instructor Bookings Spaces This Week Next Week

Time	Class	Instructor	Bookings	Spaces	This Week	Next Week
8:30AM	Penguin	TBA	1	5		
8:45AM	Jellyfish	LW	1	5		
9:00AM	Turtles	TBA	0	8		
9:15AM	Starfish	LW	1	2		
9:30AM	Turtles	TBA	0	8		
10:00AM	Turtles	TBA	0	8		
10:00AM	Seals	LW	2	2		
10:30AM	Penguin	TBA	0	6		
10:45AM	Starfish	LW	0	4		
11:00AM	Penguin	TBA	2	4		
11:30AM	Penguin	TBA	0	6		

Starfish @ 9:15 AM on Friday with Lisa Wilson

Bookings Waiting List Achievements

Session ID: 3578 Class ID: STA

Class Name: Starfish

Class Level: 5

Programme: School Age

Sessions Details

Start Date: 2/2/2018 End Date: 23/2/2018

Start Time: 9:15 AM Weekday: Friday

Block: Feb Year: 2018

No. of Lessons: 4

Frequency: Weekly

Location: Main Pool

Cost of Session

Cost Method: Cost Per Session

Default Cost: \$20.00 DD Cost: \$20.50

Default Total: \$80.00 DD Total: \$82.00

Instructor Details

Instructor: LW Lisa Wilson

Telephone:

Comments:

Waiting List

9/2/18 Jane White

Add Waitlist

- A message will be displayed asking if you wish to transfer the student from the waiting list into the selected session.

Transfer Student to Session

Are you sure you want to transfer Jane White into the Starfish class at 9:15AM?

Cancel OK

- Click **OK** to continue.

Create New Booking

Edit Tools

Enter New Booking Details

Jane White # Bookings This Block 2

76 Moorefield Road, Johnsonville, Wellington 4001
Telephone: 0272222082

Age: 7_2m Gender: Female

Has been booked in to Starfish lessons on Friday at 9:15 AM with Lisa Wilson

Start Date: 2/2/18

End Date: 23/2/18

No. of Lessons: 4

Cost of Lessons	Direct Debit	Comments
Cost Per Session	@ \$20.00	Initial Cost \$80.00
Discount Rate 10	Discount Type Percent	Discount Applied \$8.00
Payment Due By 2/2/2018		Credit Applied
Payment by Direct Debit		Value of Free Lessons \$0.00
		Balance Due \$72.00

Cancel Done

7. The **Enter New Booking** dialog box will be displayed on your screen.
8. Update the booking details to include the correct start date, number of sessions and cost.
9. Click **Done** to continue and return to the diary.

Removing a Student from the Waiting List

1. Ensure the Swim School Diary is displayed on your screen.
2. Select the required Day, Block and Year at the top of the diary screen.
3. Use the list on the left of your screen to select the session you wish to update.

Time	Class	Instructor	Bookings	Spaces	This Week	Next Week
8:30AM	Penguin	TBA	1	5		
8:45AM	Jellyfish	LW	1	5		
9:00AM	Turtles	TBA	0	8		
9:15AM	Starfish	LW	1	3		
9:30AM	Turtles	TBA	0	8		
10:00AM	Turtles	TBA	0	8		
10:00AM	Seals	LW	2	2		
10:30AM	Penguin	TBA	0	6		
10:45AM	Starfish	LW	0	4		
11:00AM	Penguin	TBA	2	4		
11:30AM	Penguin	TBA	0	6		

4. Click the **Waiting List** tabcard or the red flag in the left panel for the required session. All students wait listed for the selected session will be displayed on the lower right corner of your screen.
5. Click the **Delete** button to the right of the student name in the waiting list.

Waiting List	
9:02/18	Gregory Hargreaves

6. A message will be displayed asking if you wish to remove the student from the waiting list. Click OK to delete the waitlist entry or Cancel to close the dialog without making a change.

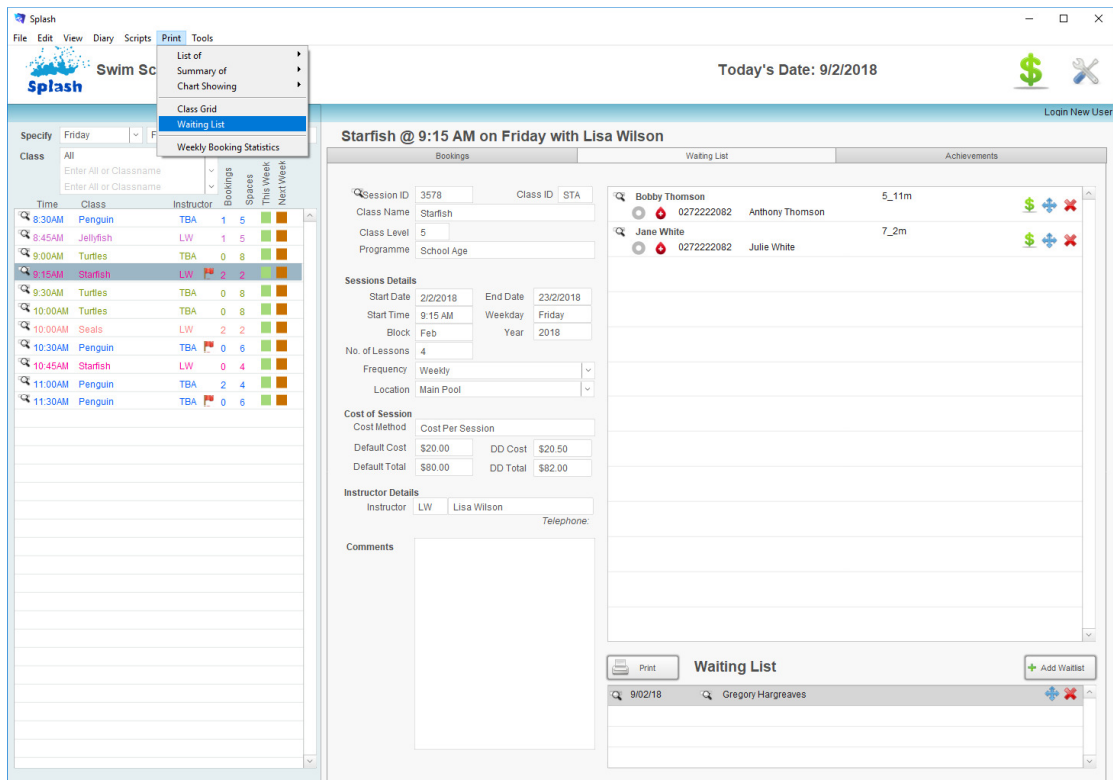
Delete Waitlist Record

Are you sure you want to remove the waitlist record for Gregory Hargreaves?

OK Cancel

Printing the Waiting List

1. Ensure the Swim School Diary is displayed on your screen.
2. Select **Waiting List** from the Print menu.



3. The Locate Waiting List Records dialog will be displayed on your screen. Enter the Block and Year for the waitlist records you wish to display and click OK.

Locate Waiting List Records

Please specify the term and year.

Block

Year

Cancel OK

4. The second Locate Waiting List Records dialog will be displayed on your screen. Enter the Classname and/or student name if you wish to print a specific list, otherwise **leave blank for all waitlist records** in the selected Block and Year and click OK.

Locate Waiting List Records

Please specify the class and/or student.

Classname

Student Name

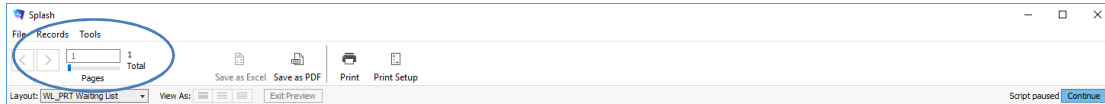
Cancel OK

Specify Sort Order

Would you like the report sorted by Class Name or Student Name

Student Class

- 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).



-

Penguin						
peter jessop	04 478 3215	10:30 AM	Fri	TBA	9/2/18	
stuart pearson	0272222082	11:30 AM	Fri	TBA	9/2/18	
Barry Robinson	0272222082	3:30 PM	Wed	LW	9/2/18	
brenda thomas	0272222082	3:30 PM	Wed	LW	9/2/18	
Starfish						
Gregory Hargreaves	0272222082	9:15 AM	Fri	LW	9/2/18	
Turtles						
Georgia Taylor	0272222082	10:00 AM	Wed	BR	9/2/18	
Georgia Taylor	0272222082	10:30 AM	Wed	BR	9/2/18	

9/2/2018 : 12:41:41 PM Page 1

- The **Message** dialog will be displayed on your screen.

Print Report

Would you like to print the waiting list report?

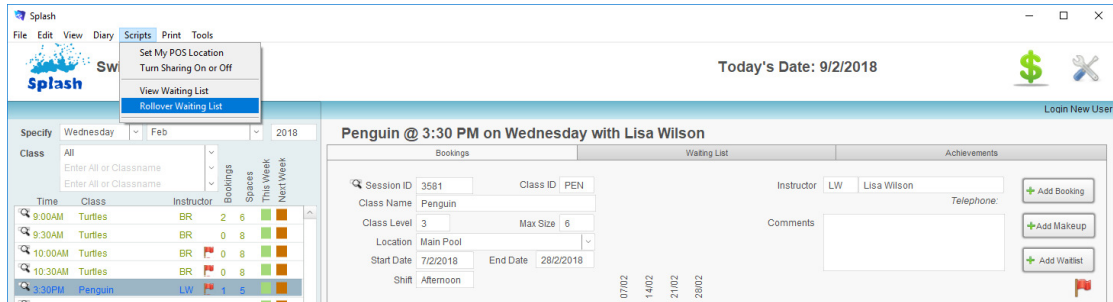
Cancel OK

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

Transferring the Waiting List to the Next Block

At the end of each term you will create your schedule for the coming block. Splash provides the ability to automatically rollover both the sessions and the bookings to assist you with recreating the bookings. In addition to the rollover of bookings and you can also transfer your waiting list entries from one block to the next. This command is only successful after you have rolled over the session details.

1. Ensure the diary is displayed on your screen.



2. Select **Rollover Waiting List** from the Scripts menu.
3. The Locate Waiting List Records dialog will be displayed on your screen. Enter the name of the Block and Year for the records you wish to rollover.

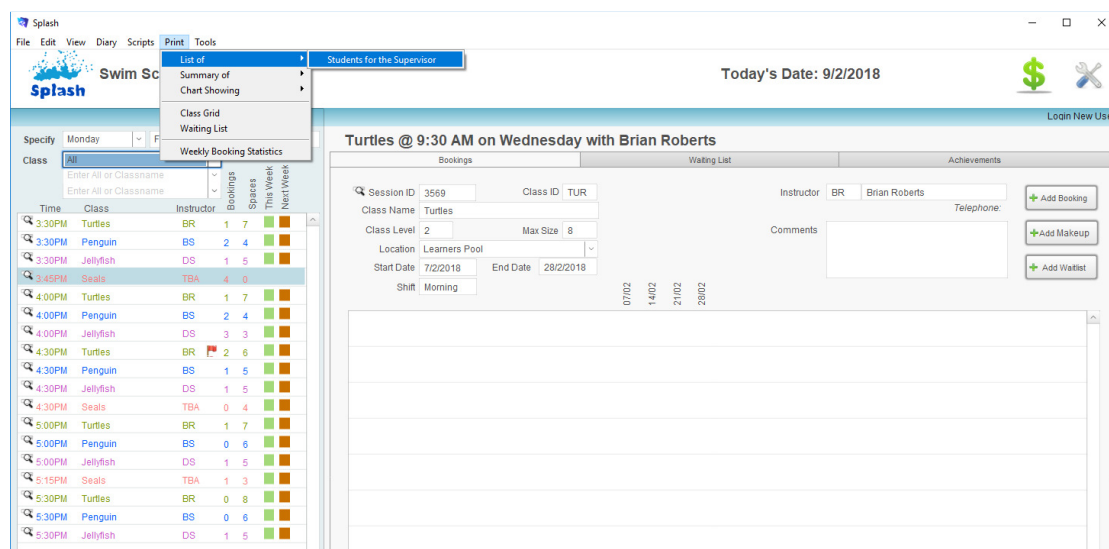
The dialog box is titled 'Locate Waiting List Records'. It contains the instruction 'Please specify the block and year to be rolled over.' Below this, there are two text input fields: 'Block' with the value 'Jan' and 'Year' with the value '2018'. At the bottom right, there are 'Cancel' and 'OK' buttons.

4. The rollover will be performed, any flags displayed in the original block will now be displayed on the next block.

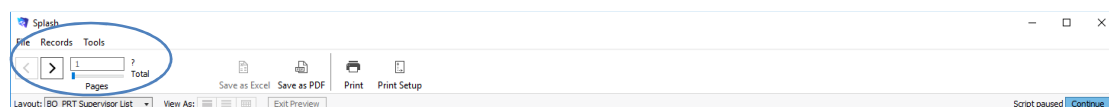
Printing Reports

Printing a List of Students for the Supervisor

1. Ensure the Swim School Diary is displayed on your screen.
2. Select the required Day, Block and Year at the top of the diary screen.
3. Select **List of ... Students for the Supervisor** from the Print menu.

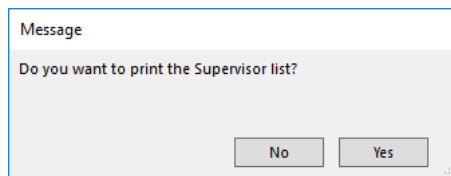


4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



Attendance List									
Supervisor Listing for Monday									
3:30 PM - Turtles (Learners Pool) Brian Roberts (1 Students)									
Brian Roberts		5/2	12/2	19/2	26/2				
\$	Paula Schwass	5_1m	Robyn Schwass	-	-	-	-	-	11
3:30 PM - Jellyfish (Main Pool) David Smith (1 Students)									
David Smith		5/2	12/2	19/2	26/2				
	James Wilson	4_1m	Mary Wilson	-	-	-	-	-	2
3:30 PM - Penguin (Main Pool) Barbara Smith (2 Students)									
Barbara Smith		5/2	12/2	19/2	26/2				
	Georgia Taylor	5_10m	Martha Taylor	-	-	-	-	-	14
	Harry Williams	4_9m	Malcolm Willia	-	-	-	-	-	0
3:45 PM - Seals (Main Pool) To Be Advised (4 Students)									
To Be Advised		5/2	12/2	19/2	26/2				
	Craig King	9_6m	Nathan King	-	-	-	-	-	0
	Hamish McDougal	8_11m	Mary McDougal	-	-	-	-	-	0
	Jack McArthur	8_7m	Andrew McArthur	-	-	-	-	-	0
	Paul Fairbrother	8_9m	Mark Fairbroth	-	-	-	-	-	0

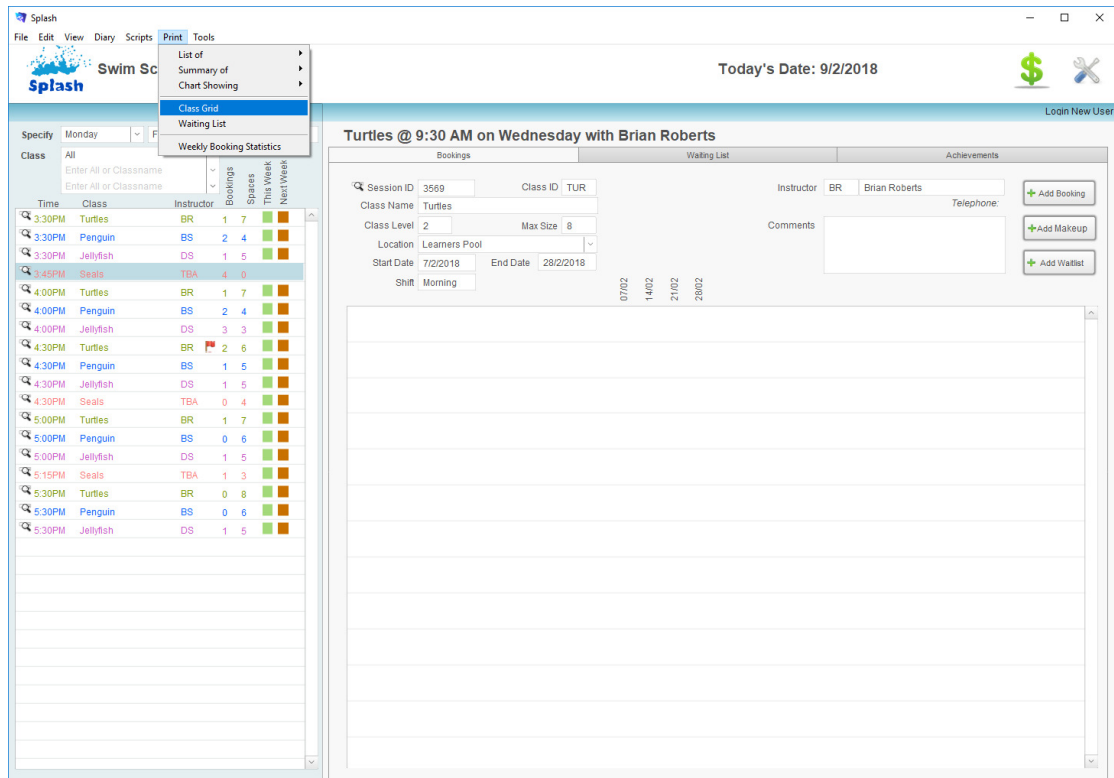
5. The **Message** dialog will be displayed on your screen.



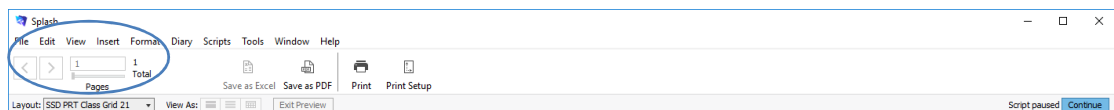
- Click **Yes** to print the report or **No** to return to your original screen without printing or emailing.

Printing the Class Grid

- Ensure the Swim School Diary is displayed on your screen.
- Select the required Day, Block and Year at the top of the diary screen.
- Select **Class Grid** from the Print menu.



- 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).



Monday Afternoon - Block Feb - 2018											
3:30pm Turtles Paula Schwass (5_1m)	1 7	3:30pm Jellyfish James Wilson (4_1m)	1 5	3:30pm Penguin Georgia Taylor (5_9m) Harry Williams (4_9m)	2 4	3:45pm Seals Craig King (9_6m) Hamish McDougal (8_11m) Jack McArthur (8_7m) Paul Fairbrother (8_8m)	4 0	4:00pm Turtles Billy Jones (5_8m)	1 7	4:00pm Jellyfish William Smith (7_11m) Simon Thomas (8_0m) Debra Patterson (8_5m)	3 3
BR	Learners Pool	DS	Main Pool	BS	Main Pool	TBA	Main Pool	BR	Learners Pool	DS	Main Pool
4:30pm Turtles Joanne Jones (2_10m) Paula Schwass (5_1m) Jason Smith (6_5m) *	2 6	4:30pm Seals No Bookings	0 4	4:30pm Jellyfish Jamie Watkins (4_10m)	1 5	4:30pm Penguin Lucas Smith (5_7m)	1 5	5:00pm Turtles Peter Williamson (4_0m)	1 7	5:00pm Jellyfish Jamie Anderson (3_6m)	1 5
BR	Learners Pool	TBA	Main Pool	DS	Main Pool	BS	Main Pool	BR	Learners Pool	DS	Main Pool
5:15pm Seals Zac Zimmerman (10_1m)	1 3	5:30pm Turtles No Bookings	0 8	5:30pm Jellyfish Corey Morrison (4_2m)	1 5	5:30pm Penguin No Bookings	0 6				
TBA	Main Pool	BR	Learners Pool	DS	Main Pool	BS	Main Pool				

Printed 9/2/18 at 12:48 PM

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

Print Report

Would you like to print the selected report?

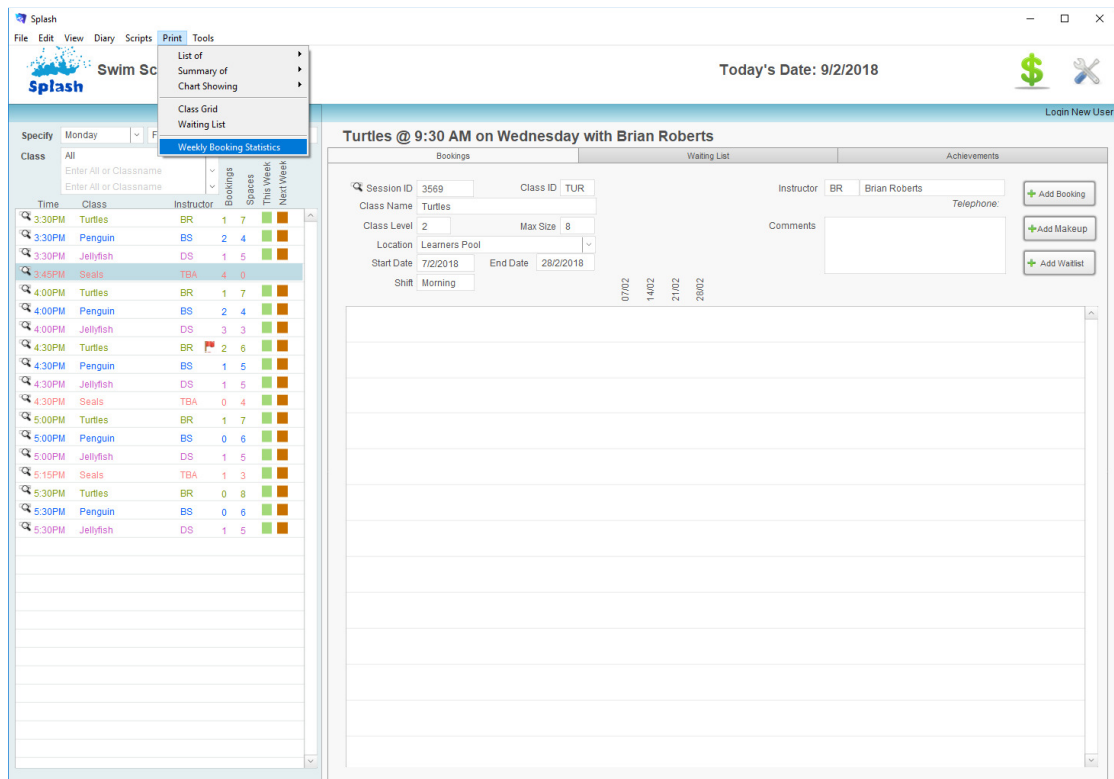
Cancel
OK

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

Printing Weekly Booking Statistics

Weekly booking statistics are a series of six pre written reports. Simply enter a start and an end date and Splash will locate the relevant records and produce the following six reports.

1. Ensure the Swim School Diary is displayed on your screen.
2. Select **Weekly Booking Statistics** from the Print menu.



3. The Specify Start and End Dates for Reporting dialog will be displayed on your screen.
4. Enter the date range for reporting. Dates should be entered as dd/mm/yy. Splash will use this date range (including the two specified) to locate data for each report. Click OK.

Specify Start and End Dates for Reporting

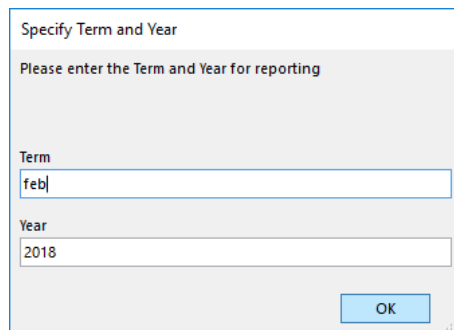
Please enter the start date and the end date for the week you wish to report.

Week Start
3/2/18

Week End
9/2/18

OK

5. The Specify Term and Year dialog will be displayed on your screen.
6. Enter the Term/Block and Year to be included in your reporting and click OK.



Specify Term and Year

Please enter the Term and Year for reporting

Term
feb

Year
2018

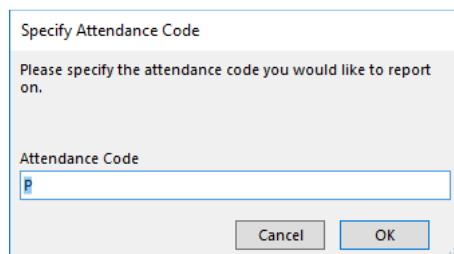
OK

7. Splash will now locate the relevant records for reporting. The following six reports will be displayed on your screen.

Report 1 – Summary of Attendance

This report displays the total number of swimmers with a specified attendance code who were active at the time specified for your report.

9. The Specify Attendance Code dialog will be displayed on your screen.
10. Enter the attendance code you wish to have counted.



Specify Attendance Code

Please specify the attendance code you would like to report on.

Attendance Code
P

Cancel OK

10. In the example below P has been used to define a student as present for a lesson. The summary report shows a count of how many P's were entered for each date.
11. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).

Summary of Attendance													
Attendance Code : P													
Block Feb - 2018													
Monday	22	5/02	12/02	19/02	26/02	0	0	0	0	0	0	0	0
Jellyfish		0	0	0	0	0	0	0	0	0	0	0	0
Penguin		0	0	0	0	0	0	0	0	0	0	0	0
Seals		0	0	0	0	0	0	0	0	0	0	0	0
Turtles		0	0	0	0	0	0	0	0	0	0	0	0
Tuesday	8	6/02	13/02	20/02	27/02	0	0	0	0	0	0	0	0
Jellyfish		0	0	0	0	0	0	0	0	0	0	0	0
Starfish		0	0	0	0	0	0	0	0	0	0	0	0
Wednesday	9	7/02	14/02	21/02	28/02	0	0	0	0	0	0	0	0
Penguin		0	0	0	0	0	0	0	0	0	0	0	0
Turtles		0	0	0	0	0	0	0	0	0	0	0	0
Thursday	14	1/02	8/02	15/02	22/02	0	0	0	0	0	0	0	0
Shrimps		0	0	0	0	0	0	0	0	0	0	0	0
Turtles		0	0	0	0	0	0	0	0	0	0	0	0
Friday	7	2/02	9/02	16/02	23/02	0	0	0	0	0	0	0	0
Jellyfish		0	0	0	0	0	0	0	0	0	0	0	0
Penguin		0	0	0	0	0	0	0	0	0	0	0	0
Seals		0	0	0	0	0	0	0	0	0	0	0	0
Starfish		0	0	0	0	0	0	0	0	0	0	0	0

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

Message

Would you like to print the Attendance Summary?

Cancel

PDF

Print

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

Report 2 – Summary of Bookings

This report displays a count of the number of bookings, exits and catchups which

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

Summary of Bookings			
Summary by Weekday			
	Number of Bookings	Number of Exits	Number of Catchups
Term: Feb 2018	66	0	0
Monday	22	0	0
<i>Jellyfish</i>	7	0	0
<i>Penguin</i>	5	0	0
<i>Seals</i>	5	0	0
<i>Turtles</i>	5	0	0
Tuesday	8	0	0
<i>Jellyfish</i>	4	0	0
<i>Starfish</i>	4	0	0
Wednesday	9	0	0
<i>Penguin</i>	7	0	0
<i>Turtles</i>	2	0	0
Thursday	14	0	0
<i>Shrimps</i>	6	0	0
<i>Turtles</i>	8	0	0
Friday	7	0	0
<i>Jellyfish</i>	1	0	0
<i>Penguin</i>	3	0	0
<i>Seals</i>	2	0	0
<i>Starfish</i>	1	0	0
Sunday	6	0	0
<i>Dolphins</i>	1	0	0
<i>Penguin</i>	5	0	0
Total Reported	66	0	0

9/2/2018 : 12:53:32 PM

Page

15. The **Message** dialog will be displayed on your screen.

Message

Do you want to print the selected report?

Cancel

PDF

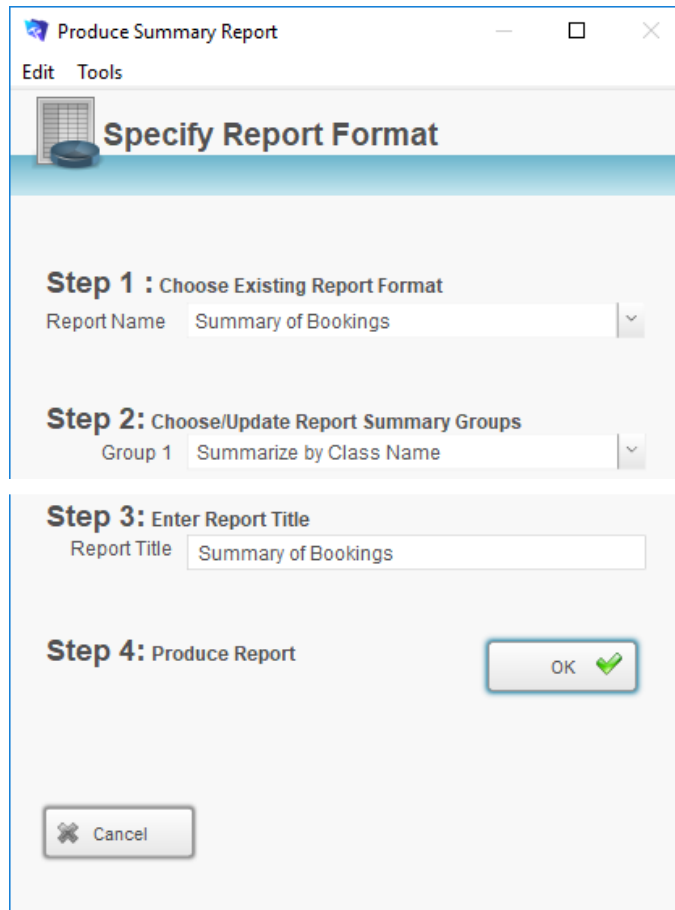
Print

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

Report 3 – Chart Showing Summary of Bookings

This report shows the same information as displayed in report 2, however it is represented as a chart.

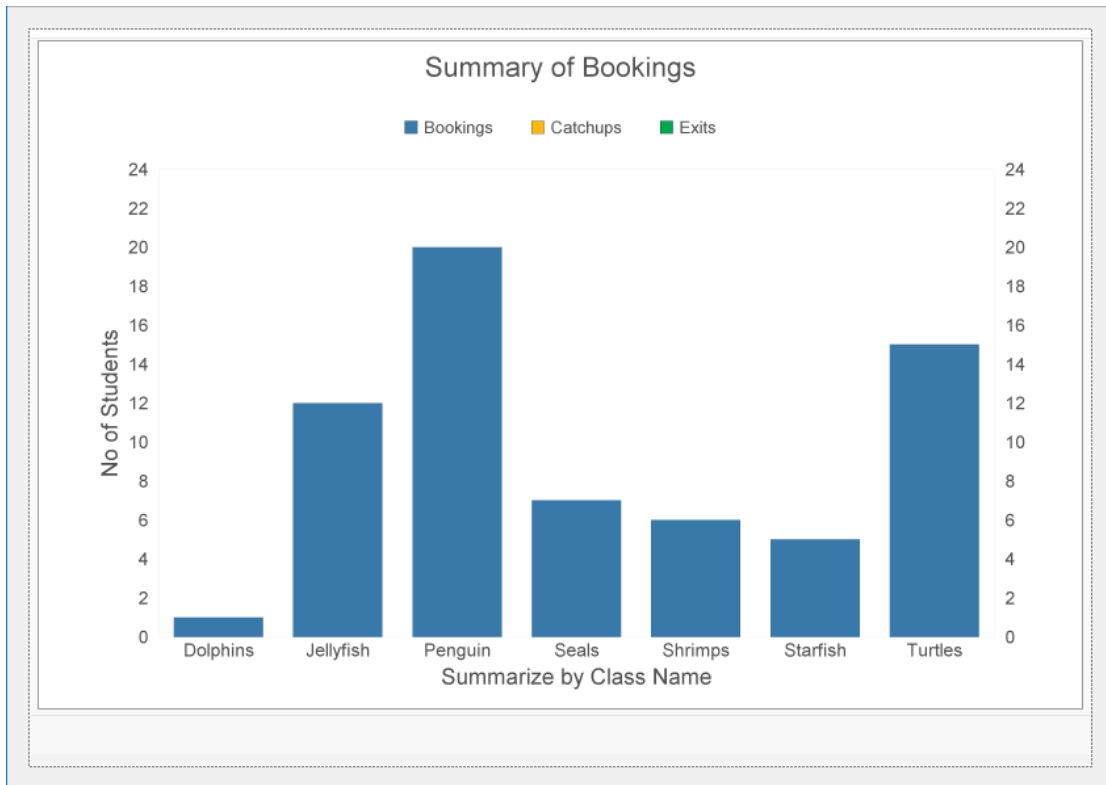
16. The Produce Summary Report dialog will be displayed on your screen.
17. You may elect to leave this dialog exactly as displayed and simply click the OK button. OR you may change the format of the report by amending the selections at Step 1 and Step 2.



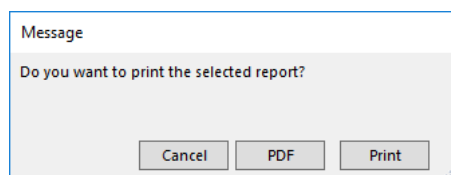
The image shows a software dialog box titled "Produce Summary Report". It has a menu bar with "Edit" and "Tools". Below the menu bar is a header area with a grid icon and the text "Specify Report Format". The dialog is divided into four steps:

- Step 1 : Choose Existing Report Format**
Report Name: Summary of Bookings (dropdown menu)
- Step 2: Choose/Update Report Summary Groups**
Group 1: Summarize by Class Name (dropdown menu)
- Step 3: Enter Report Title**
Report Title: Summary of Bookings (text input field)
- Step 4: Produce Report**
Contains an "OK" button with a green checkmark icon and a "Cancel" button with a red X icon.

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



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



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

Report 4 – List of Outstanding Balances

This report displays a list of all outstanding accounts for the selected block and year.

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

Bookings - Current Balance of Booking		
Balance as at 9/2/2018		
		Balance
Anderson (David Anderson)	0272222082	\$126.00
<i>Jamie : Jellyfish 5:00 PM Mon block Feb 2018 (\$72.00)</i>		
<i>Sally : Shrimps 10:00 AM Thu block Feb 2018 (\$54.00)</i>		
Aplin (Sylvia Aplin)	0272222082	\$72.00
<i>Peter : Penguin 5:00 PM Wed block Feb 2018 (\$72.00)</i>		
Apollo (Martha Apollo)	0272222082	\$108.00
<i>Anthony : Turtles 11:00 AM Thu block Feb 2018 (\$54.00)</i>		
<i>Peter : Shrimps 10:00 AM Thu block Feb 2018 (\$54.00)</i>		
Brown (Sam Brown)	0272222082	\$72.00
<i>Amanda : Penguin 3:30 PM Sun block Feb 2018 (\$72.00)</i>		
Buchanan (Debbie Buchanan)	0272222082	\$144.00
<i>Frederick : Penguin 5:30 PM Sun block Feb 2018 (\$72.00)</i>		
<i>Gareth : Jellyfish 4:00 PM Tue block Feb 2018 (\$72.00)</i>		
Fairbrother (Mark Fairbrother)	0272222082	\$72.00
<i>Jonathan : Jellyfish 3:30 PM Tue block Feb 2018 (\$72.00)</i>		
Hargreaves (Susan Hargreaves)	0272222082	\$160.00
<i>Gregory : Starfish 5:00 PM Tue block Feb 2018 (\$80.00)</i>		
<i>Jessica : Jellyfish 4:30 PM Tue block Feb 2018 (\$80.00)</i>		
Harper (Edith Harper)	0272222082	\$60.00
<i>Robert : Turtles 10:00 AM Thu block Feb 2018 (\$60.00)</i>		
Hughson (Ngaire Hughson)	0272222082	\$126.00
<i>Hayden : Turtles 9:00 AM Wed block Feb 2018 (\$54.00)</i>		
<i>Stephanie : Jellyfish 8:45 AM Fri block Feb 2018 (\$72.00)</i>		
jessop (Tony Jessop)	04 478 3215	\$136.00
<i>peter : Penguin 5:00 PM Sun block Feb 2018 (\$82.00)</i>		
<i>William : Turtles 10:30 AM Thu block Feb 2018 (\$54.00)</i>		
Jones (David Jones)	0272222082	\$320.80
<i>Billy : Turtles 4:00 PM Mon block Feb 2018 (\$54.00)</i>		
<i>Joanne : Turtles 11:00 AM Thu block Feb 2018 (\$54.00)</i>		
<i>Joanne : Turtles 4:30 PM Mon block Feb 2018 (\$54.00)</i>		
<i>sam : Dolphins 6:00 PM Sun block Feb 2018 (\$80.00)</i>		
<i>william : Jellyfish 4:00 PM Mon block Feb 2018 (\$78.80)</i>		
Kimble (Amanda Kimble)	0272222082	\$72.00
<i>Janet : Starfish 5:00 PM Tue block Feb 2018 (\$72.00)</i>		
King (Nathan King)	0272222082	\$144.00
<i>Craig : Seals 3:45 PM Mon block Feb 2018 (\$72.00)</i>		
<i>David : Penguin 11:00 AM Fri block Feb 2018 (\$72.00)</i>		
9/2/2018 : 12:58:36 PM		Page 1

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

Message

Do you want to print the selected report?

Cancel

PDF

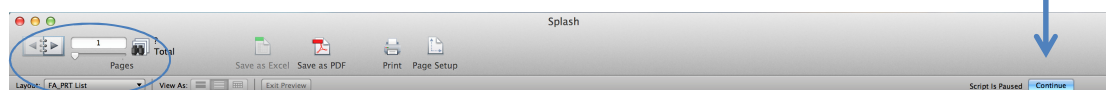
Print

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

Report 5 – Summary of New Bookings

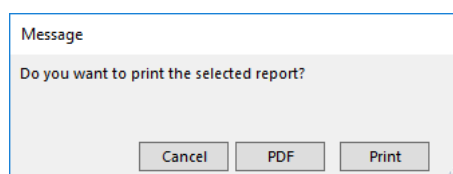
This report shows a summary of new bookings that have been received in the date range specified.

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



Summary of Bookings Summary of New Bookings			
	Number of Bookings	Number of Exits	Number of Catchups
Term: Feb 2018	1	0	0
Friday	1	0	0
Starfish	1	0	0
Total Reported	1	0	0

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



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

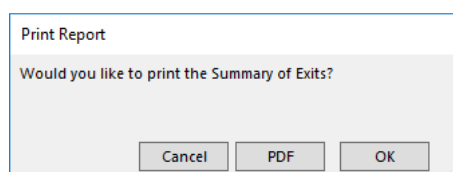
Report 6– Summary of Exits

This report shows a summary of any bookings that have been terminated within the specified timeframe.

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

Summary of Bookings Summary of Exits			
	Number of Bookings	Number of Exits	Number of Catchups
Financial	1	1	0
Other Commitments	1	1	0
Total Reported	2	2	0

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

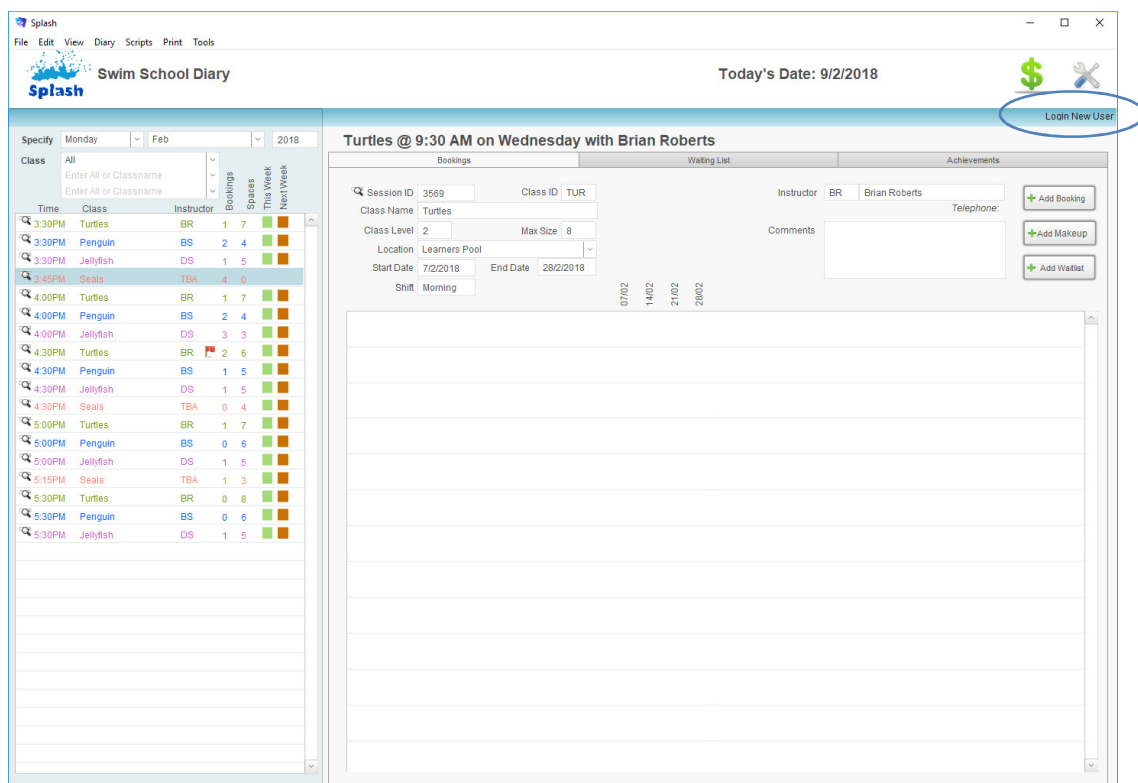


29. Click **Print** to print the report, **PDF** to save the report as a PDF or **Cancel** to return to your original screen without printing or saving.

Logging in as a New User

Each user account contains a personalised set of access privileges. At times you may not have the level of access needed to perform a selected function. If this occurs you can get another user to login using an alternative account. You do NOT need to exit the Splash program in order to switch user accounts.

1. Ensure the Swim School Diary is displayed on your screen.
2. Click once on the **Login New User** button displayed on the right of the blue stripe.
3. You will be asked to enter your username and password.
4. Enter the required details and click OK



Welcome to Splash

Username

Password

Cancel OK

Using Splash Point of Sale

The first section of this guide addresses setting up each area of POS so it is ready for use.

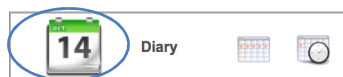
Payment processing is accessed using the green dollar symbol on the top right corner of your screen. The full point of sale system, however is accessed via the Splash menu on the top left of your screen. Your user access privileges will define whether you can process a payment, run reports, enter new products, or order stock. If you have insufficient access to complete any task, please refer to your system administrator.

Defining Your Point of Sale Location

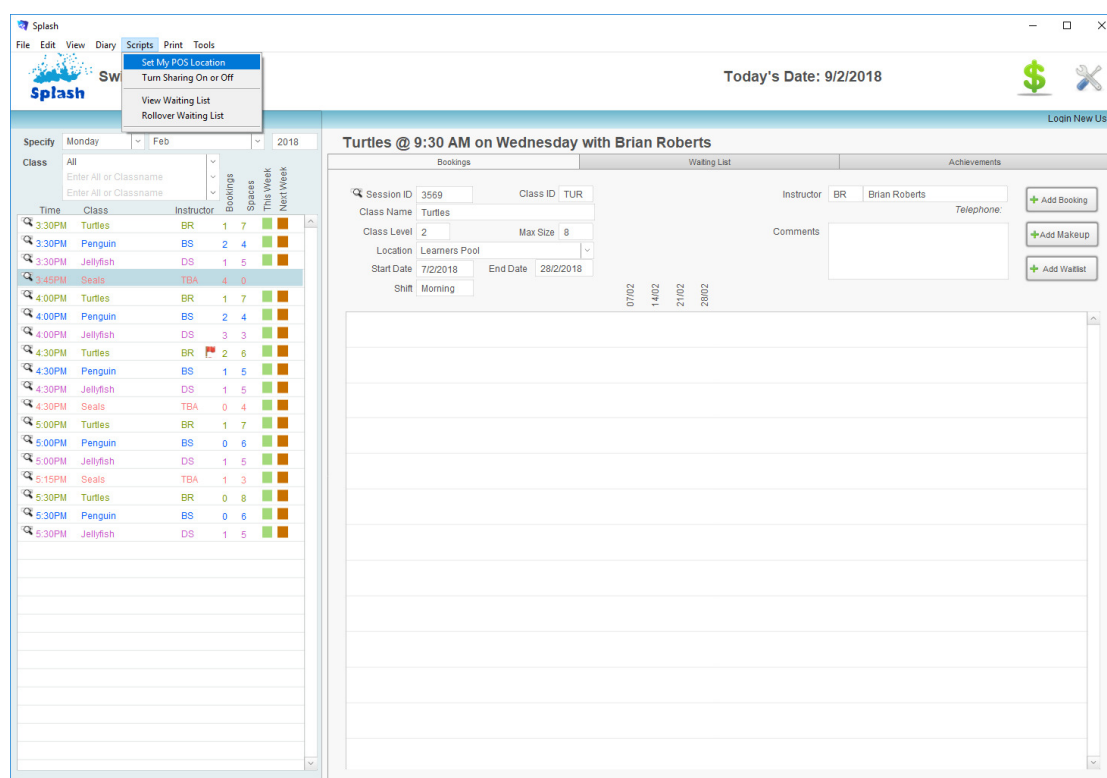
Your point of sale location determines the interface that will be displayed when you access the sale entry screen. Splash provides the flexibility to customise the user interface for multiple locations. The default location when you first begin using Splash is "POS 1".

Before you can begin using Splash Point of Sale (POS) system you must define your POS Location.

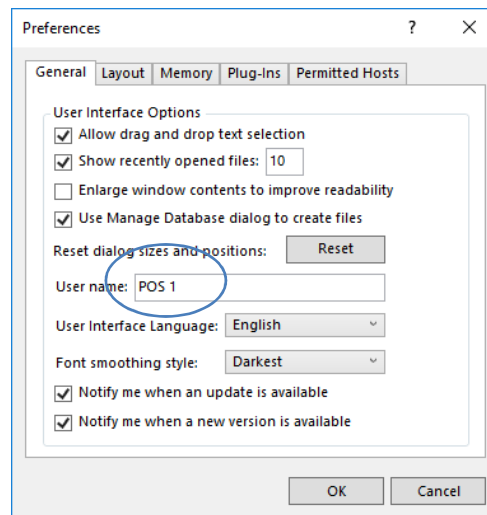
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Daily Diary** icon



3. Select **Set My POS Location** from the Scripts menu.



4. The Preferences dialog will be displayed on your screen.



5. If this is your first time accessing POS enter the default POS location of **“POS 1”** in the Other box.
6. Click OK to save the changes you have made.

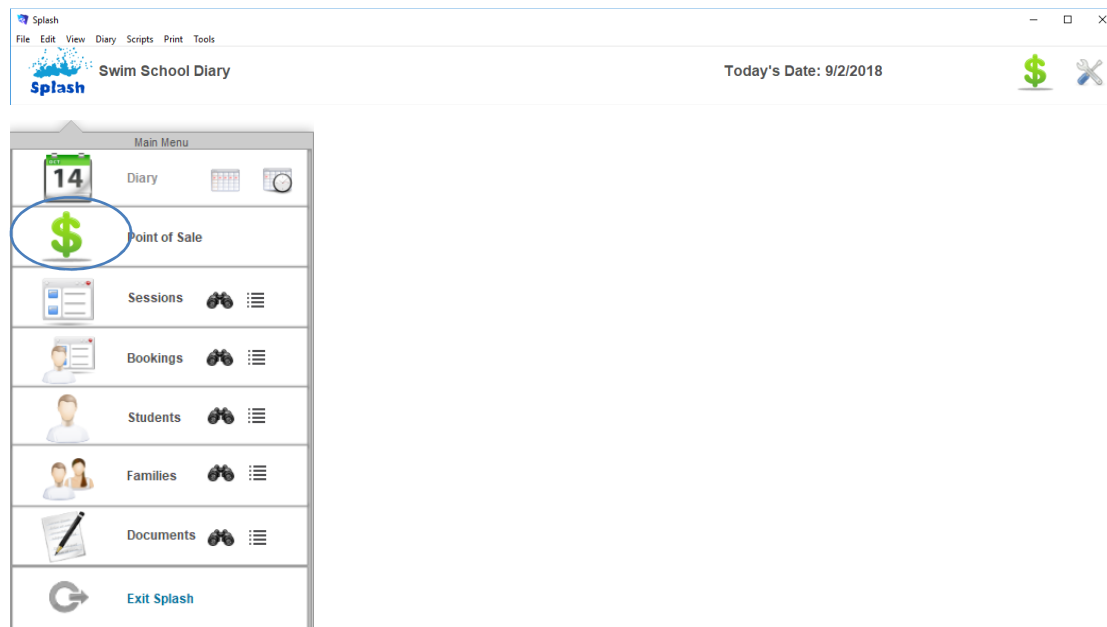
NB: If you have created multiple display options in the POS system, the above name should match the name of the interface you have defined. To define additional interface screens see “Defining Your Point of Sale Location” in this guide.

Administering Point of Sale (POS)

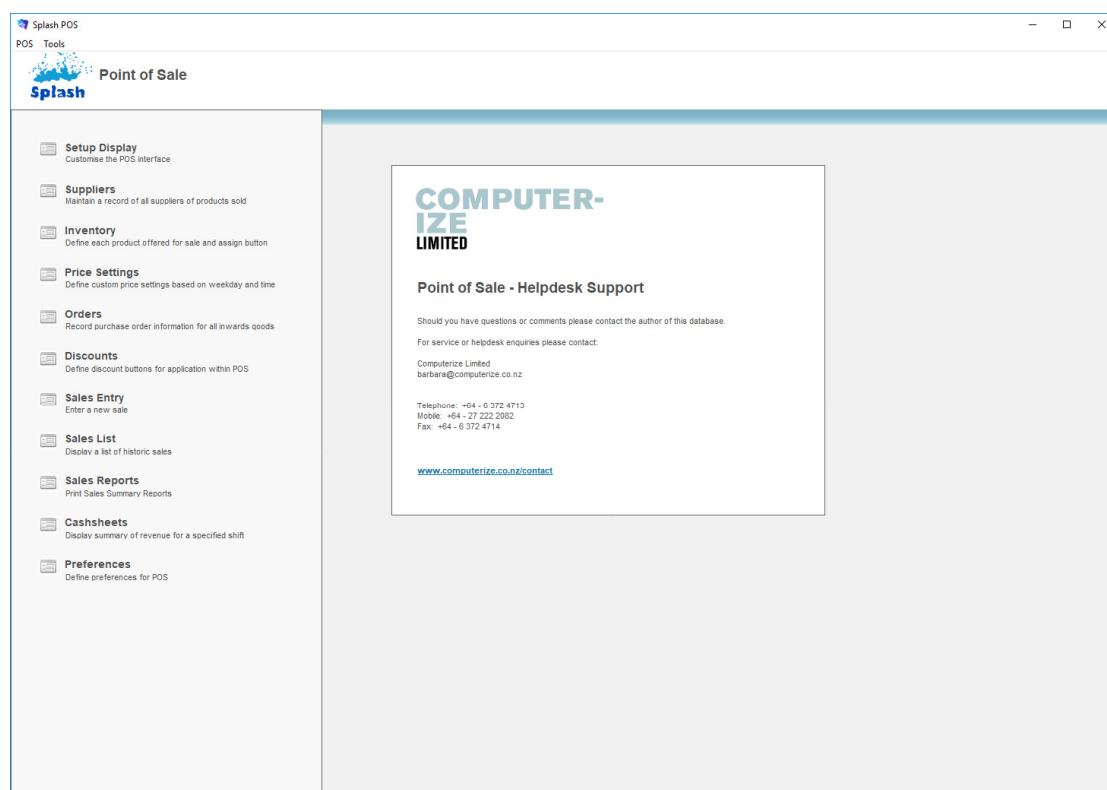
In order to use the Point of Sale system you will need to define the interface you wish to display and the products you wish to sell.

This section of the manual guides you through configuring POS to meet your needs.

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



3. The POS administration screen will be displayed.

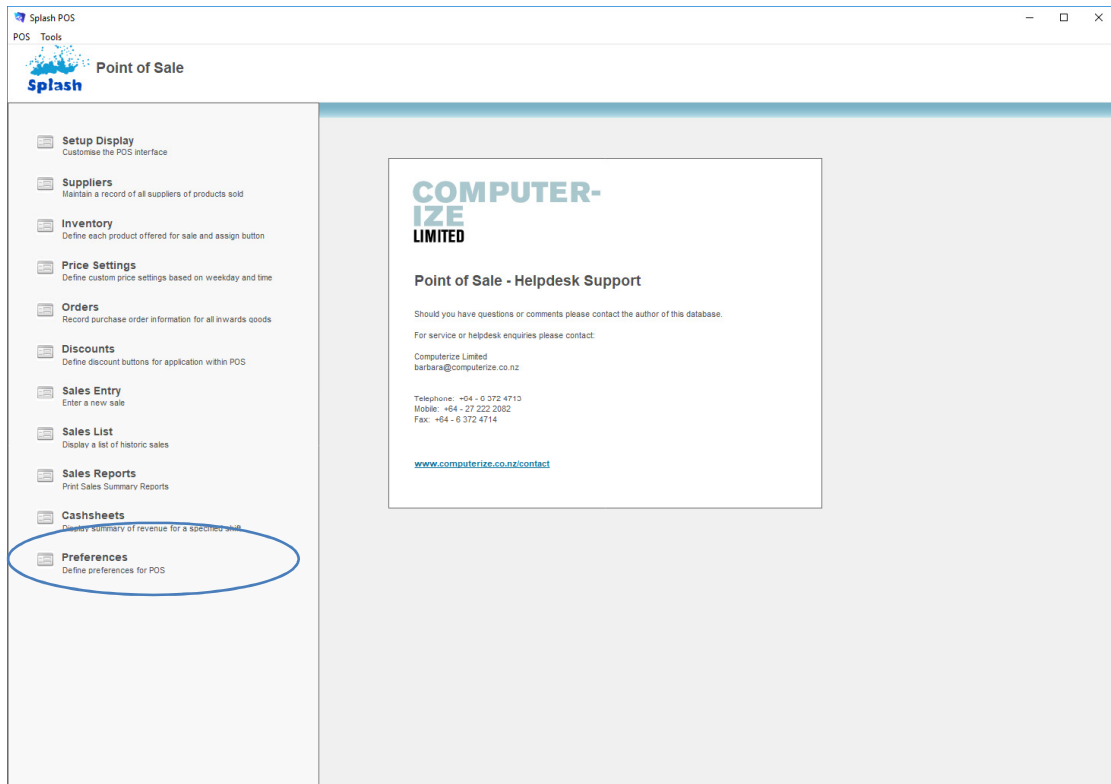


Updating Swim School Information

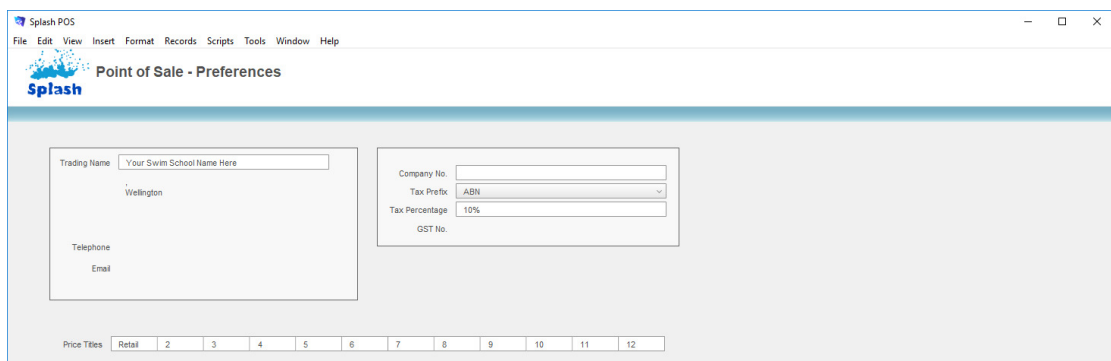
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Point of Sale** icon



3. Click once on the icon beside the word Preferences on the left of your screen.



4. The Point of Sale Preferences will be displayed on your screen
5. Complete your school trading name (it will be displayed on receipts) and your tax information.
6. Additional information about your Swim School can be updated in the Splash Preferences for School Details.



7. Complete as many fields as possible then click the Splash Menu button to return to the POS home screen. Your information is saved as you type.

NB: Remember to define your Tax Prefix (ABN – Australia ; GST – New Zealand) along with the current tax rate for your location.

The tax rate entered here will only be applied to nominated products, it will not be applied to all products.

Defining Point of Sale Locations

Locations are used to identify alternative interfaces for different workstations. Multiple workstations can share the same interface however in some instances you may wish to display a different interface for a different area of the business (a kiosk may use a different button configuration to the front desk).

When creating a Location you need to

- Define the Location name.
- Define the POS interface (button configuration).

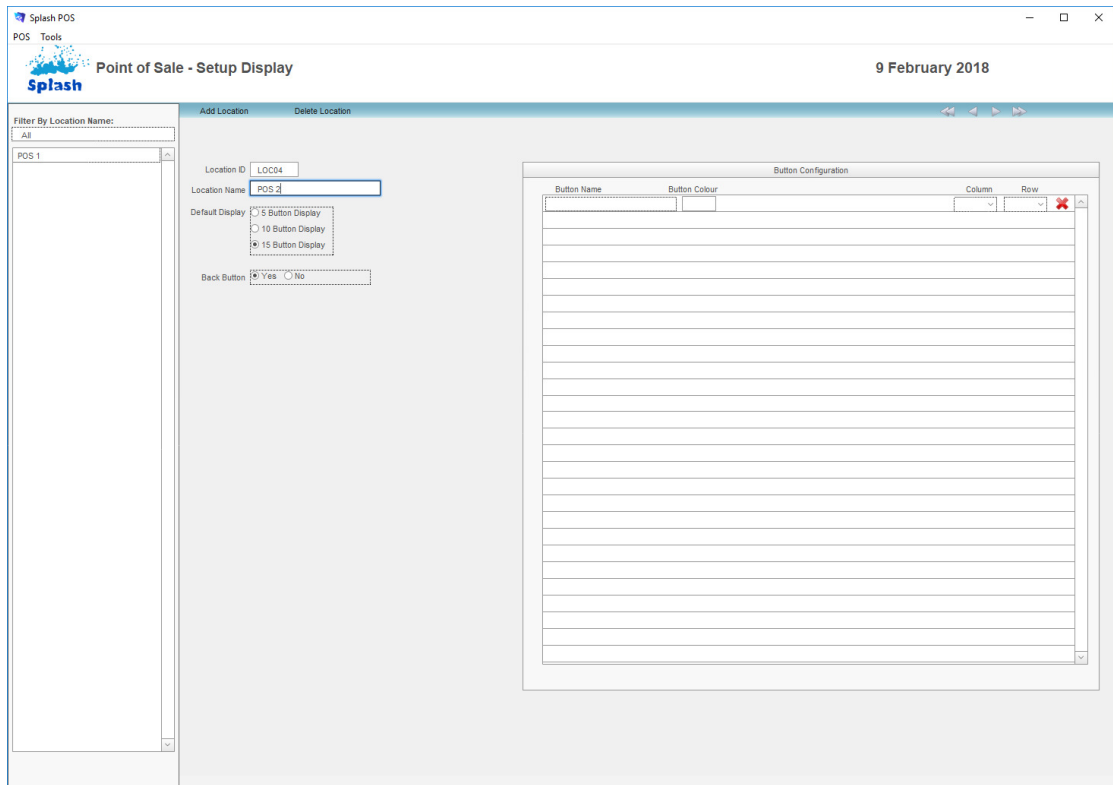
Creating a New Location

It may be easier to consider a location an interface design. Changing information in this screen will determine;

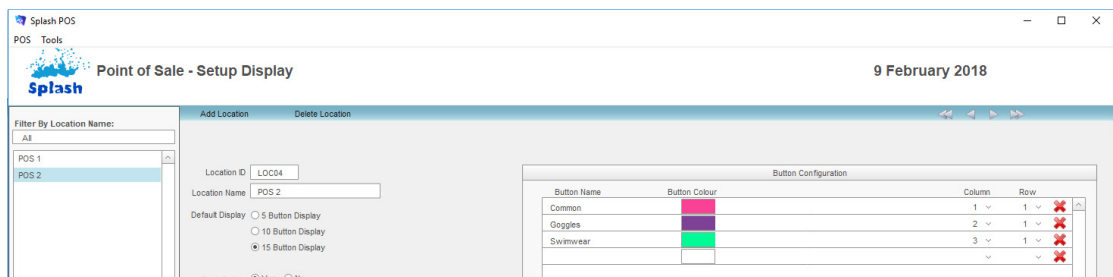
- which buttons are displayed when you process a payment,
 - where the buttons will be positioned, and
 - how each button will appear on the top left of the sales entry screen.
1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
 2. Click once on the icon beside the word **Setup Display** on the left of your screen to display the Point of Sale Setup Display screen.

Button Name	Button Colour	Column	Row
Common	Orange	1	1
Passes	Dark Green	1	2
Bathers	Dark Green	2	1
Goggles	Blue	2	2
Accessories	Orange	3	1
Canteen	Blue	4	1
Drinks	Purple	4	2
Ice Creams	Purple	4	3
Misc	Purple	5	1

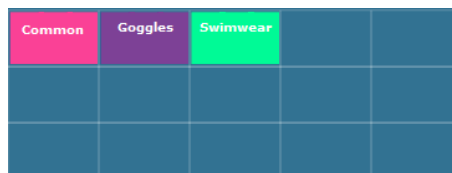
3. Click the **Add Location** button displayed in the blue stripe at the top of your screen to display a blank Location form.



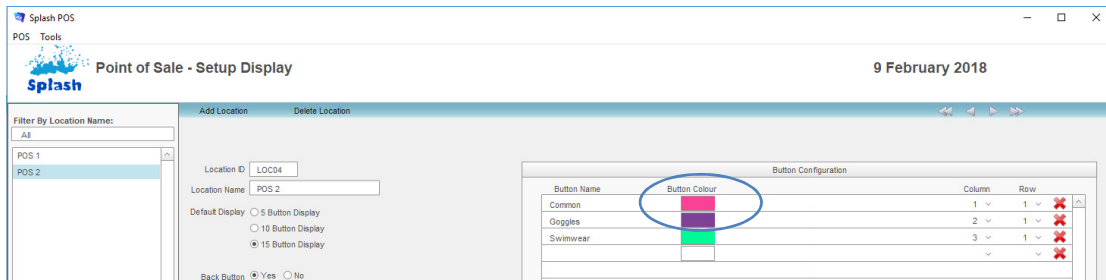
4. Define a Name for the required interface.
5. After entering the location defaults you now need to define the Button Configuration. The button configuration determines which buttons are displayed on the top left of your screen and their appearance.
6. The category buttons sit in a grid consisting of columns and rows. This screen gives you the ability to define each category button, its colour and the location it will sit within the grid.
7. Enter the names for each category button in the POS Interface fields at the right of the screen. Remember to define both the column and row where the button should reside.



The above configuration would be displayed as follows;



8. Define the colour of each POS button by clicking the sample Button Colour.



9. Colours are defined using RGB settings. Enter numbers between 1 and 255 in the fields for Red (R), Green (G) and Blue (B). Click OK.

10. The colour representing the numbers you have entered will be displayed in the button configuration list.
 11. Repeat steps 7 through 9 until the required buttons have been defined.
 12. When you have finished click the Splash Menu button to return to the POS home screen. Your information is saved as you type.
- NB:** For a comprehensive list of colours see the RGB Colour Palette (page 392).

Displaying a Location

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Setup Display** on the left of your screen to display the Point of Sale Setup Display screen.

3. Use the list on the left of your screen to click once on the location you wish to display.

Updating Location Details

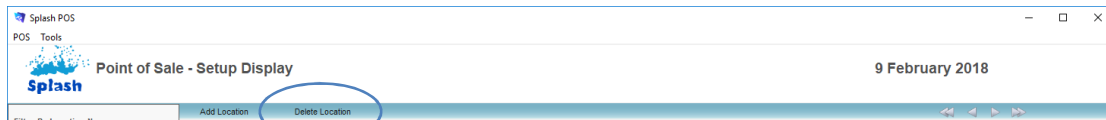
1. Use the **Displaying a Location** command to ensure the correct location is displayed on your screen.
2. Update any details as required.

Button Configuration			
Button Name	Button Colour	Column	Row
Common		1	1
Passes		1	2
Batters		2	1
Goggles		2	2
Accessories		3	1
Canteen		4	1
Drinks		4	2
Ice Creams		4	3
Misc		5	1

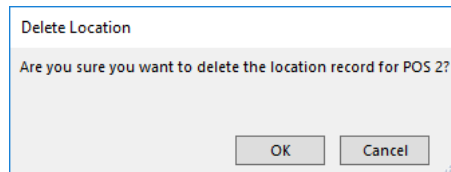
Deleting a Location Record

Location records can only be deleted in Setup Display. Deleting a Location will remove all POS interface settings for the selected Location.

1. Use the **Displaying a Location** command to ensure the correct location is displayed on your screen.
2. Click once on the **Delete Location** button displayed in the blue stripe at the top of your screen.



3. You will be asked to confirm you wish to delete the selected Location record.



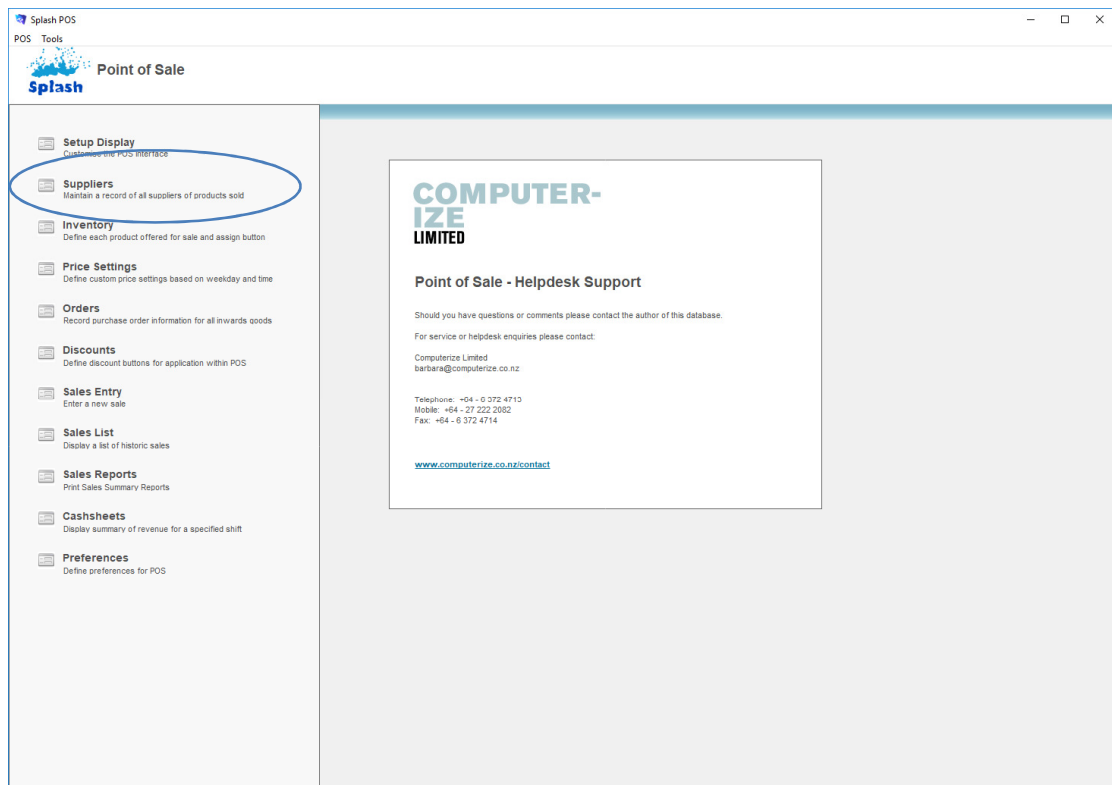
4. Click OK to delete the record, or Cancel to return to the form without making any changes.

Entering Supplier Information

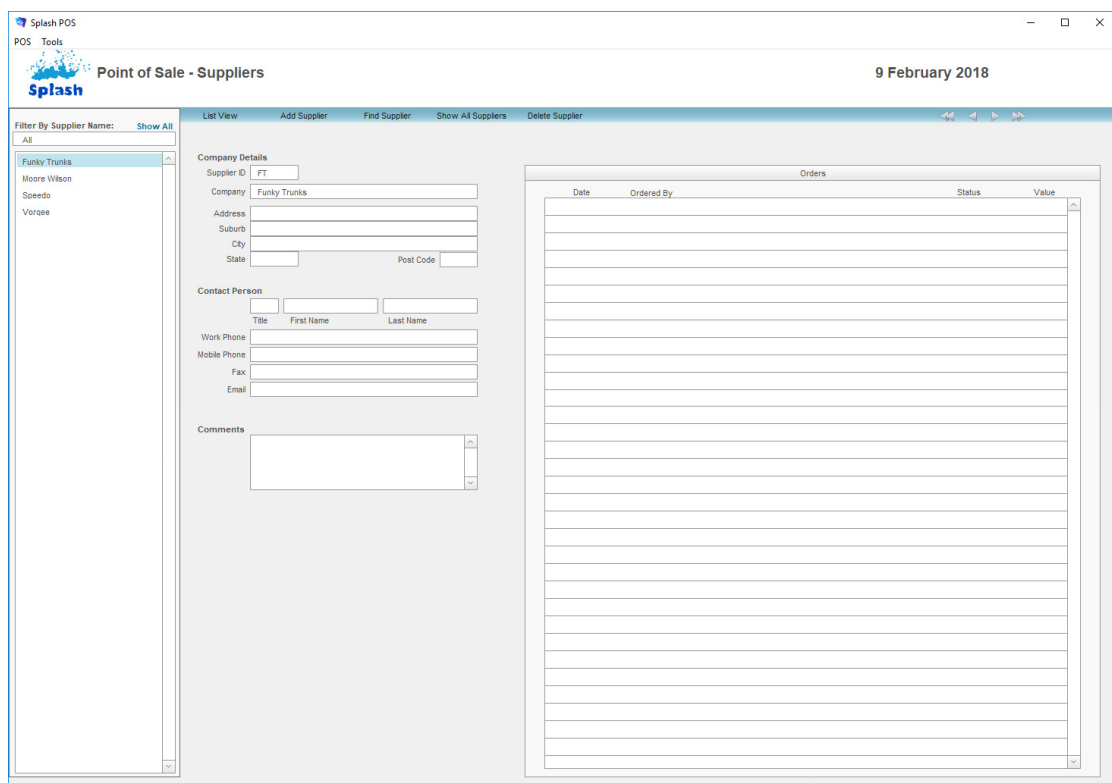
Although it is not essential for successful operation, it is recommended you create a supplier record for each company you will be purchasing stock from.

Creating a New Supplier

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Suppliers** on the left of your screen.



3. The Point of Sale – Suppliers screen will be displayed.



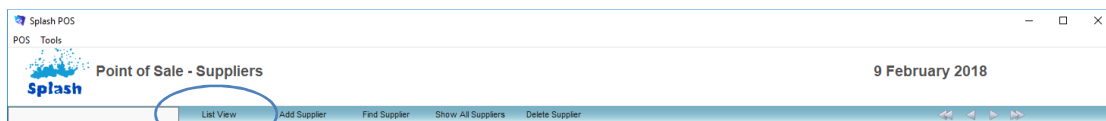
4. Click the **Add Supplier** button displayed in the blue stripe at the top of your screen to display a blank Supplier form.
5. Complete as many details as possible for the selected supplier.
6. When you have finished in the Supplier module, click the Splash Menu button to return to the POS home screen. Your information is saved as you type or when you exit the screen.

NB: Each supplier must be created with a unique ID

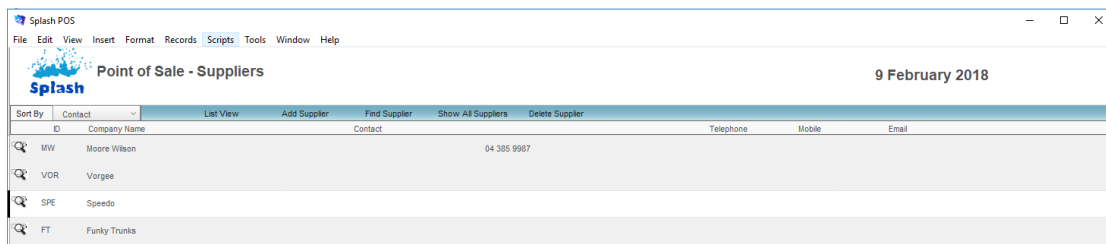
Displaying a List of Suppliers

Each record in your supplier module can be displayed in either a form view or as part of a list. List view displays all records in the found set.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Suppliers** on the left of your screen.
3. Click once on the **List View** button displayed in the blue stripe at the top of your screen.



4. All records in the found set will be displayed in the list.

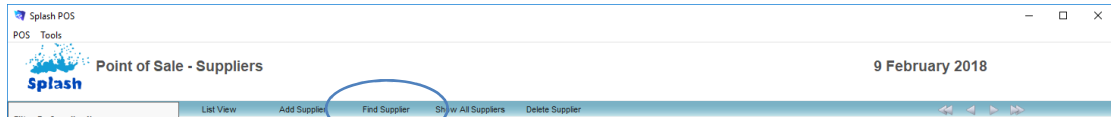


NB: Display the detail of a selected supplier by clicking the magnifying glass displayed to the left of the Supplier ID.

NB: Sort the list in ascending order by selecting the sort order from the Sort By field.

Finding a Supplier

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Suppliers** on the left of your screen.
3. Click once on the **Find Supplier** button displayed in the blue stripe at the top of your screen.



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

A screenshot of the 'Search for a Supplier' dialog box. The dialog has a title bar with a magnifying glass icon and the text 'Search for a Supplier'. Below the title bar is a search form with the following fields: 'Supplier ID' (with a blue border), 'Company', 'Contact Person', 'Address', 'Suburb', 'City', 'State', 'Post Code', 'Telephone', 'Mobile', and 'Email'. Each field has a magnifying glass icon inside it. At the bottom of the dialog are six buttons: 'Cancel' (with a close icon), 'New Request' (with a plus icon), 'Omit Records' (with a minus icon), 'Constrain Set', 'Extend Set', and 'Find Now' (with a magnifying glass icon).

5. Enter the criteria for your find in the appropriate field/s.
6. Press ENTER or click the **Find Now** button to complete the find.
7. If one record is located the record will be displayed on the Supplier form. If multiple records are located the found set will be displayed in the list view.

Updating Supplier Details

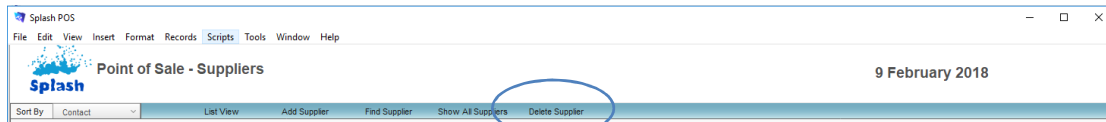
1. Use the **Finding a Supplier** command to ensure the correct supplier record is displayed on your screen.
2. Update any details as required.

NB: A supplier ID should not be changed after stock has been entered and orders have been placed. Changing the Supplier ID will remove all links to previous orders.

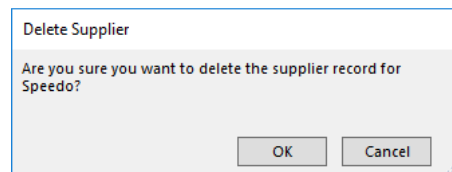
Deleting a Supplier Record

Supplier records can be deleted from within either the Supplier entry form or list view.

1. Use the **Finding a Supplier** command to ensure the correct supplier record is displayed on your screen.
2. If working in List View, click the goggles to display the relevant Supplier entry form.
3. Click once on the **Delete Supplier** button displayed in the blue stripe at the top of your screen.



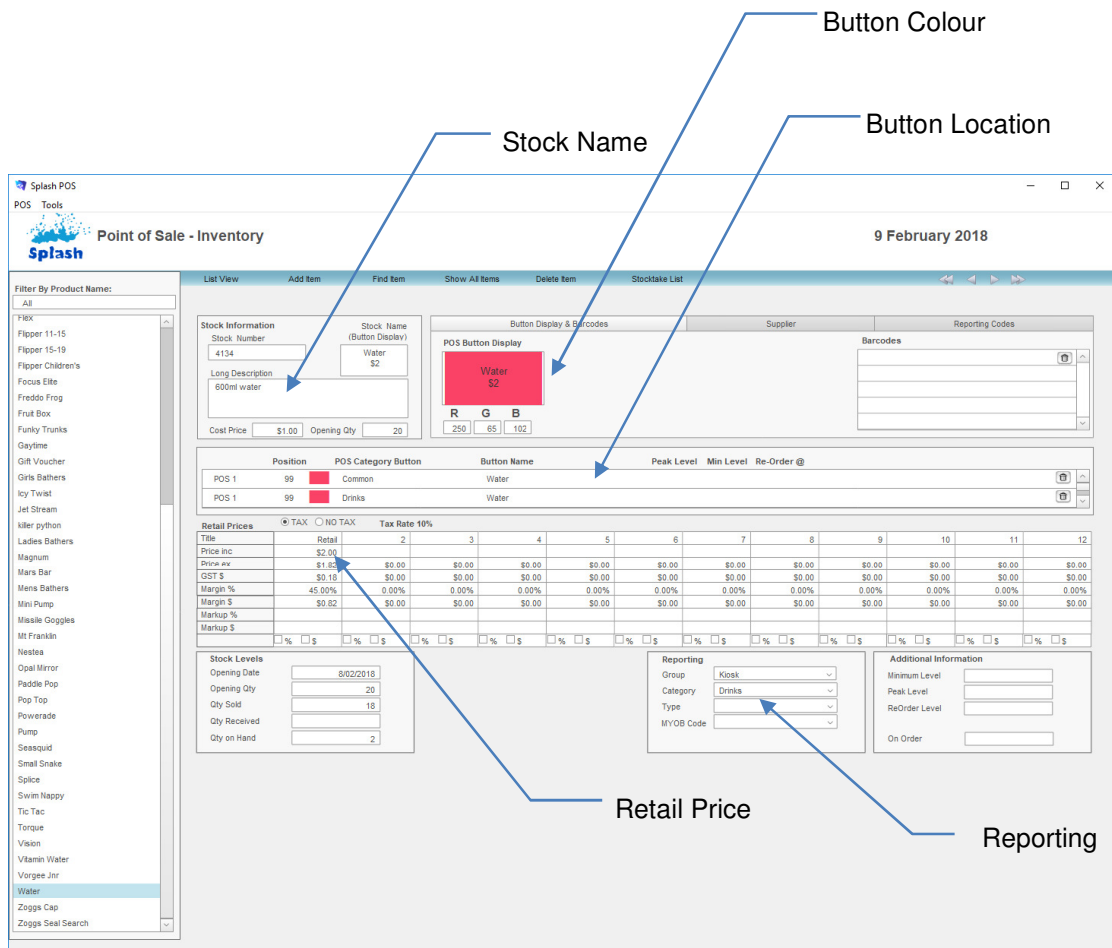
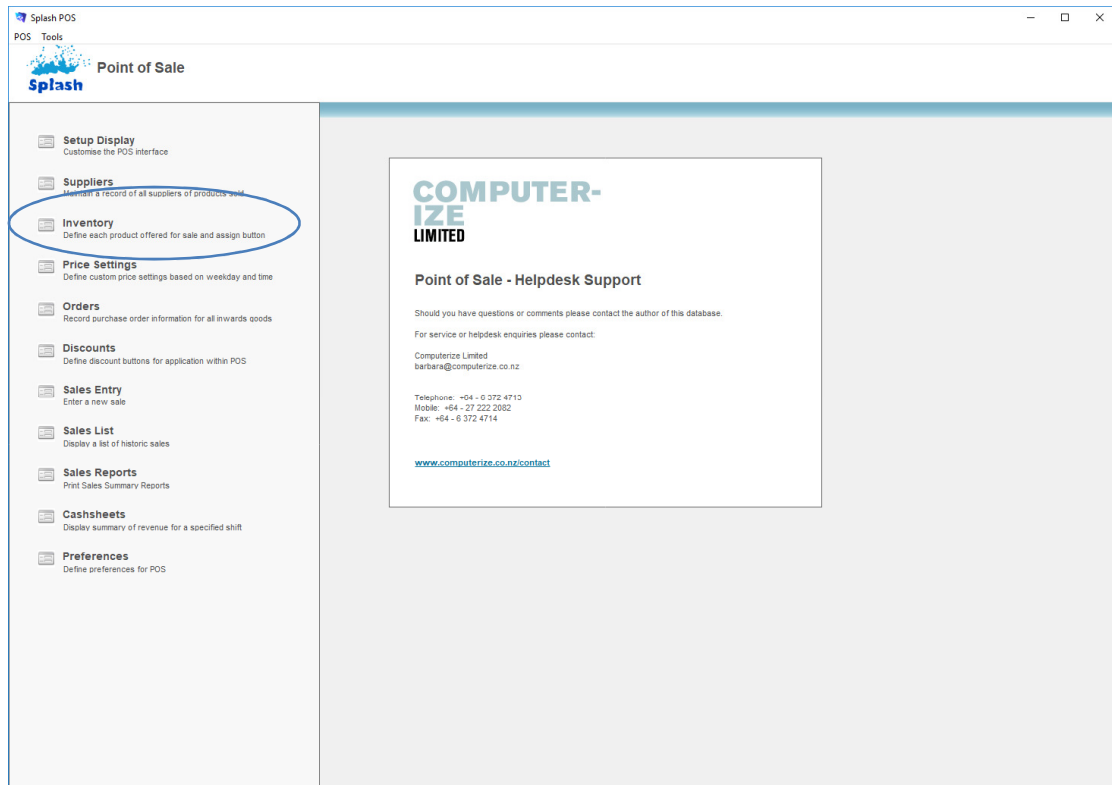
4. You will be asked to confirm you wish to delete the selected Supplier record.



5. Click OK to delete the record, or Cancel to return to the supplier form without making any changes.

Managing Inventory

Splash POS recognises all bookings as products within a sale. In addition to bookings you may need to process products for sale through the POS system. This section of the manual guides you through entering the products you wish to sell.



Creating an Inventory Item

Entering a new stock item is a five-step process. All five steps should be completed when a new item is created.

1. Define the stock item name
2. Define the button colour
3. Define the location for the POS button
4. Define the price of the product
5. Define the classifications for reporting

Each of the above steps is completed within the Point of Sale – Inventory screen. When you have completed all of the above steps the stock item will be available for use in the sale entry screen.

Title	Retail	2	3	4	5	6	7	8	9	10	11	12
Price inc	\$2.00											
Price excl	\$1.02	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
GST %	\$0.18	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Margin %	45.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Markup %	\$0.82	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Markup \$												
Markup %												

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



1. Defining a New Stock Item

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Inventory** on the left of your screen.

- Click the **Add Item** button displayed in the blue stripe at the top of your screen to display a blank Inventory form.

The screenshot shows the 'Point of Sale - Inventory' window. The top blue stripe contains buttons: 'List View', 'Add Item' (circled), 'Find Item', 'Show All Items', 'Delete Item', and 'Stocktake List'. Below this is a 'Filter By Product Name' dropdown set to 'All'. The main area is divided into sections: 'Stock Information' (with fields for Stock Number, Long Description, Cost Price, and Opening Qty), 'POS Button Display' (a black rectangle with 'R G B' labels and input fields for 39, 65, and 102), 'Button Display & Barcodes', 'Supplier', and 'Reporting Codes'. A 'Retail Prices' table is also visible, showing columns for Title, Retail, and various tax/margin percentages. A 'Stock Levels' section on the left includes fields for Opening Date, Opening Qty, Qty Sold, Qty Received, and Qty on Hand. A 'Reporting' section on the right includes fields for Group, Category, Type, MYOB Code, Minimum Level, Peak Level, ReOrder Level, and On Order.

- Enter the Stock Name and Long description for the item you wish to sell.

2. Defining the Button Colour

- Click once on the grey button displayed on your screen to display the Colouring Buttons dialog.

The 'POS Button Display' dialog shows a black rectangle representing the button. Below it are three input fields labeled 'R', 'G', and 'B' with values 39, 65, and 102 respectively. The 'Colouring Buttons' dialog is open, displaying the text 'Please Enter a number between 1 to 255'. It has three input fields: 'Red' with the value 39, 'Green' with the value 65, and 'Blue' with the value 102. At the bottom are 'Cancel' and 'OK' buttons.

- Enter numbers between 1 and 255 within the fields for Red (R), Green (G) and Blue (B). See the RGB colour palette (page 392) of this document for a selection of colours. Click OK.

- The button will be displayed as it will appear in the sale entry screen.

NB: Add the price to the button name if you would like to have the price displayed without selecting the item.

3. Defining the POS Button Location

Position	POS Category Button	Button Name	Peak Level	Min Level	Re-Order @
POS 1	99	Common	Water		
POS 1	99	Drinks	Water		

- Select the POS Location (interface) the button should appear in using the drop-down menu provided. Repeat this step for as many locations as required.

- Choose the category the button will appear within by selecting it from the POS button drop-down menu.

4. Defining the Price of the Product

- Click the Tax Rate button to define whether the item attracts GST or not.
- Define the retail price (price inc) of the selected product.

Retail Prices		Tax Rate 10%											
Title	<div><input checked="" type="radio"/> TAX <input type="radio"/> NO TAX</div>	2	3	4	5	6	7	8	9	10	11	12	
Price inc	Retail \$2.00												
Price ex	\$1.82	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
GST \$	\$0.18	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Margin %	45.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Margin \$	\$0.82	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Markup %													
Markup \$													
	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	<div><input type="checkbox"/> % <input type="checkbox"/> €</div>	

- This screen is vital to successful calculation of GST and for monitoring stock levels.

5. Defining Reporting Options

- When you first create a product remember to enter the current number of items held in stock. If you are about to place your first order, enter zero in the opening quantity field.

- The Group, Category, and Type fields are used for reporting purposes only. All sales can be summarised by each of the three classifications.

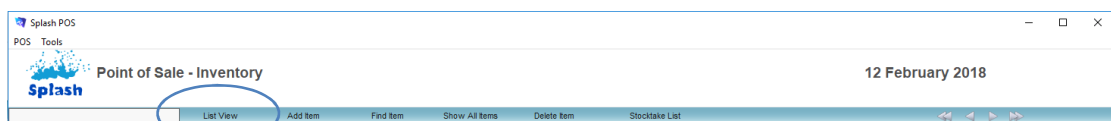
Displaying a List of Inventory items

Each item of inventory can be displayed in either a form view or as part of a list. List view displays all records in the found set. Two list options have been provided within the POS system; Standard List and Stocktake List

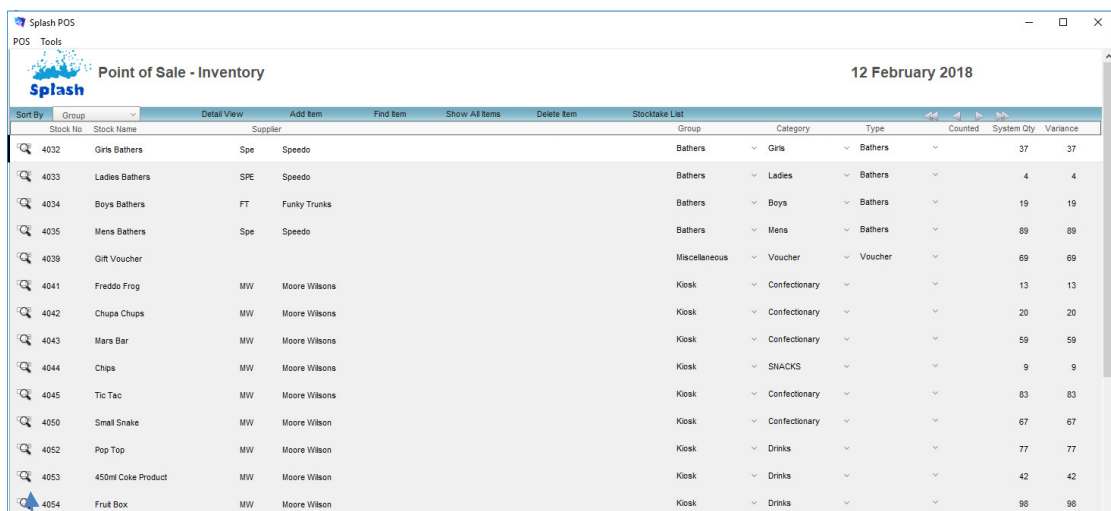
Listing Stock Items

This list contains a list of each inventory item along with the reporting classifications for each product. It also displays the current stock levels and the last counted value.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Inventory** on the left of your screen.
3. Click once on the **List View** button displayed in the blue stripe at the top of your screen.



4. All records in the found set will be displayed in the list.



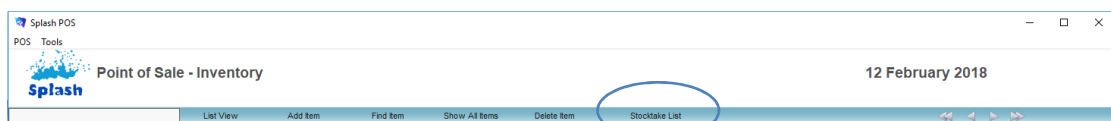
Sort By	Group	Stock No	Stock Name	Supplier	Detail View	Add Item	Find Item	Show All Items	Delete Item	Stocktake List	Group	Category	Type	Counted	System Qty	Variance
		4032	Girls Bathers	Spe	Speedo						Bathers	Girls	Bathers	37	37	
		4033	Ladies Bathers	SPE	Speedo						Bathers	Ladies	Bathers	4	4	
		4034	Boys Bathers	FT	Funky Trunks						Bathers	Boys	Bathers	19	19	
		4035	Mens Bathers	Spe	Speedo						Bathers	Mens	Bathers	88	88	
		4039	Gift Voucher								Miscellaneous	Voucher	Voucher	69	69	
		4041	Freddo Frog	MW	Moore Wilsons						Kiosk	Confectionary		13	13	
		4042	Chupa Chups	MW	Moore Wilsons						Kiosk	Confectionary		20	20	
		4043	Mars Bar	MW	Moore Wilsons						Kiosk	Confectionary		58	58	
		4044	Chips	MW	Moore Wilsons						Kiosk	SNACKS		9	9	
		4045	Tic Tac	MW	Moore Wilsons						Kiosk	Confectionary		83	83	
		4050	Small Snake	MW	Moore Wilson						Kiosk	Confectionary		67	67	
		4052	Pop Top	MW	Moore Wilson						Kiosk	Drinks		77	77	
		4053	450ml Coke Product	MW	Moore Wilson						Kiosk	Drinks		42	42	
		4054	Fruit Box	MW	Moore Wilson						Kiosk	Drinks		98	98	

NB: Display the detail for a selected item by clicking the magnifying glass displayed to the left of the Stock No.

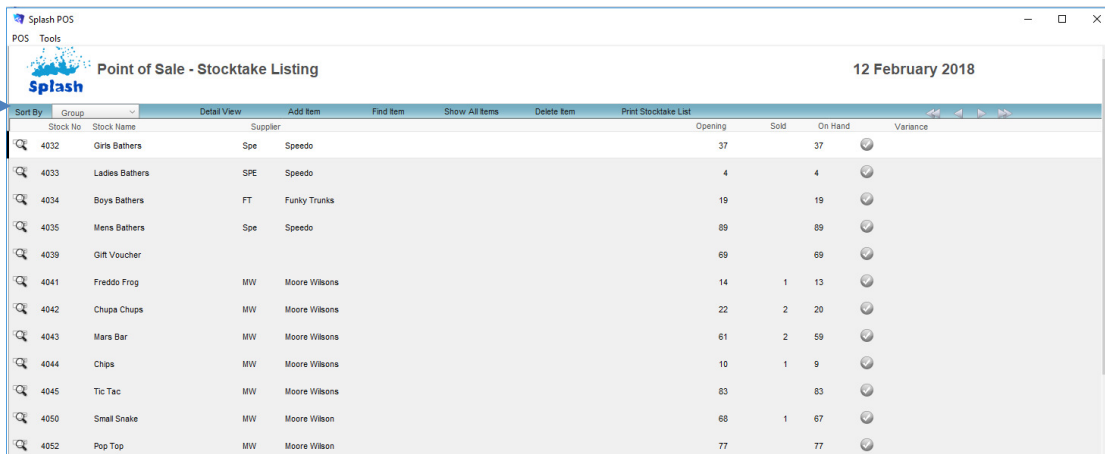
Listing Stocktake Results

This list contains a list of products including the current stock level and the most recent stocktake count. It also contains the variance between on hand and counted values.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Inventory** on the left of your screen.
3. Click once on the **Stocktake List** button displayed in the blue stripe at the top of your screen.



4. All records in the found set will be displayed in the list.

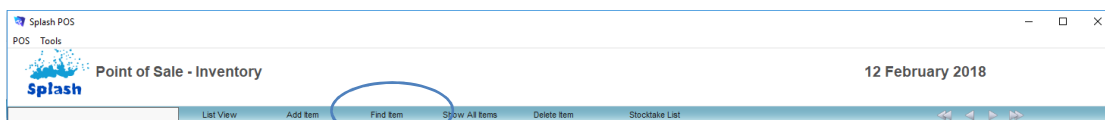


Sort By	Group	Detail View	Add Item	Find Item	Show All Items	Delete Item	Print Stocktake List	Opening	Sold	On Hand	Variance
4032	Girls Bathers	Spe	Speedo					37		37	
4033	Ladies Bathers	SPE	Speedo					4		4	
4034	Boys Bathers	FT	Funky Trunks					19		19	
4035	Mens Bathers	Spe	Speedo					89		89	
4039	Gift Voucher							69		69	
4041	Freddo Frog	MW	Moore Wilsons					14	1	13	
4042	Chupa Chups	MW	Moore Wilsons					22	2	20	
4043	Mars Bar	MW	Moore Wilsons					61	2	59	
4044	Chips	MW	Moore Wilsons					10	1	9	
4045	Tic Tac	MW	Moore Wilsons					83		83	
4050	Small Snake	MW	Moore Wilson					68	1	67	
4052	Pop Top	MW	Moore Wilson					77		77	

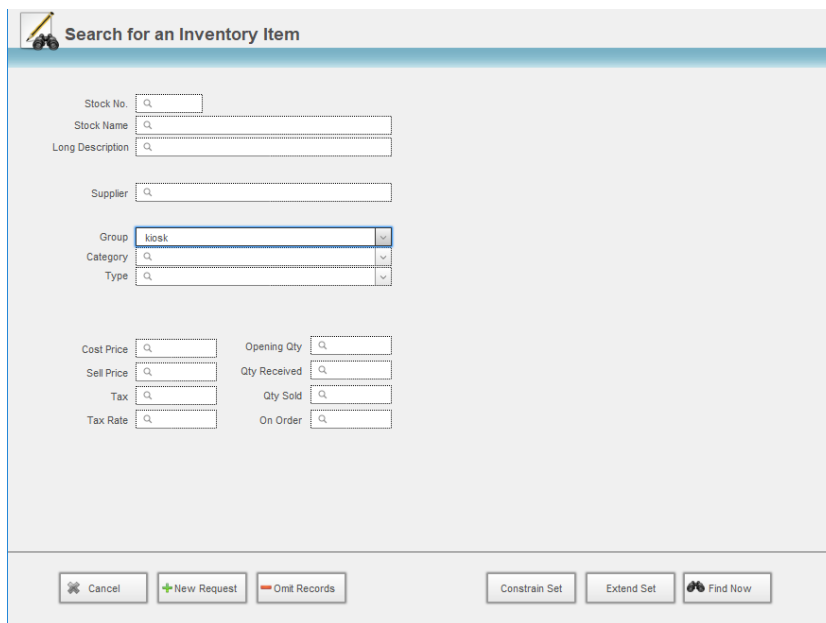
NB: Sort the list in ascending order by clicking the drop-down menu in the top left corner of your screen.

Finding Inventory Items

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Inventory** on the left of your screen.
3. Click once on the **Find** button displayed in the blue stripe at the top of your screen.



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



Search for an Inventory Item

Stock No.

Stock Name

Long Description

Supplier

Group

Category

Type

Cost Price Opening Qty

Selling Price Qty Received

Tax Qty Sold

Tax Rate On Order

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

Displaying Inventory items in the Portal

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Inventory** on the left of your screen.
3. The Inventory data entry screen will be displayed, enter the name (or part thereof) of the product you wish to display in the filter field at the top of the portal list on the left of your screen.
4. Click once on the product item you wish to update.
5. The portal row will be highlighted to indicate the active record. The details of the selected inventory item will be displayed on the right of your screen.

Point of Sale - Inventory 9 February 2018

Filter By Product Name:

Product List (Left):

- Flipper 11-15
- Flipper 15-19
- Flipper Children's
- Focus Elite
- Freddo Frog
- Fruit Box
- Funky Trunks
- Gaytime
- Gift Voucher
- Girls Bathers
- Icy Twist
- Jet Stream
- Killer Python
- Ladies Bathers
- Magnum
- Mars Bar
- Mens Bathers
- Mini Pump
- Missile Goggles
- Mt Franklin
- Nestea
- Opal Mirror
- Paddle Pop
- Pop Top
- Powerade
- Pump
- Seasquid
- Small Snake
- Spice
- Swim Nappy
- Tic Tac
- Torque
- Vision
- Vitamin Water
- Vorjee Jnr
- Water**
- Zoggs Cap
- Zoggs Seal Search

Stock Information:

Stock Number: 4134 Stock Name (Button Display): Water \$2

Long Description: 600ml water

Cost Price: \$1.00 Opening Qty: 20

Button Display & Barcodes:

POS Button Display: Water \$2

Supplier: Reporting Codes:

POS Category Button:

Position	POS Category Button	Button Name	Peak Level	Min Level	Re-Order @
POS 1	99	Common	Water		
POS 1	99	Drinks	Water		

Retail Prices:

Title	2	3	4	5	6	7	8	9	10	11	12
Price Inc	\$2.00										
Price exc	\$1.80	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
GST \$	\$0.18	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Margin %	45.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Margin \$	\$0.82	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Markup %											
Markup \$											

Stock Levels:

Opening Date: 8/02/2018

Opening Qty: 20

Qty Sold: 18

Qty Received:

Qty on Hand: 2

Reporting:

Group: Kiosk

Category: Drinks

Type:

MYOB Code:

Additional Information:

Minimum Level:

Peak Level:

ReOrder Level:

On Order:

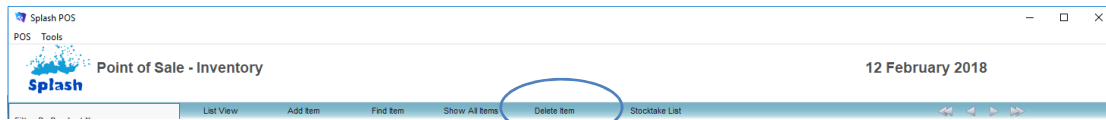
Updating Inventory Details

1. Use the **Finding Inventory items** instructions (or select the item in the portal) to locate the record you wish to update.
2. The Inventory entry form should be displayed on your screen.
3. Update any details as required.

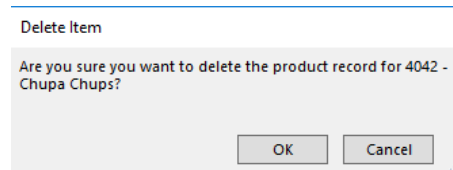
Deleting an Inventory Item

Inventory items can be deleted from within either the Inventory entry form or list view. Anyone who has access to POS administration has the ability to remove an inventory item.

1. Use the **Finding Inventory Items** instructions (or select the item in the portal) to locate the record you wish to delete.
2. Click once on the **Delete Item** button displayed in the blue stripe at the top of your screen.



3. You will be asked to confirm you wish to delete the selected Inventory item.



4. Click **OK** to delete the record, or **Cancel** to return to the inventory item form without making any changes.

Price settings provide the ability to customise the price for each inventory item based on the location, the weekday and time it is sold e.g. you may elect to reduce the price of a specific product at peak times. Price Settings in Splash POS will ensure the correct price is applied to an item when a sale is made. When creating a new price level you need to

- ### Creating a New Price Level

-  Point of Sale

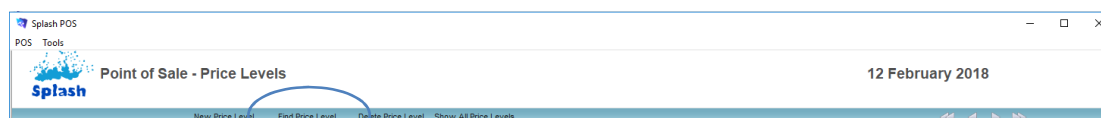
-

-
- Splash POS
- POS Tools
- ## Point of Sale - Price Levels
- 12 February 2018
- New Price Level Find Price Level Delete Price Level Show All Price Levels
- | Location | Price Level | Start Time | End Time | Week Day |
|----------|-------------|------------|----------|-----------|
| POS 1 | 1 | 12:00 AM | 12:00 AM | Wednesday |
- | Location | Price Level | Start Time | End Time | Week Day |
|----------|-------------|------------|----------|----------|
| POS 1 | 2 | 8:00 AM | 9:00 AM | Monday |
- | Location | Price Level | Start Time | End Time | Week Day |
|----------|-------------|------------|----------|----------|
| POS 1 | 2 | 8:00 AM | 10:00 AM | Saturday |

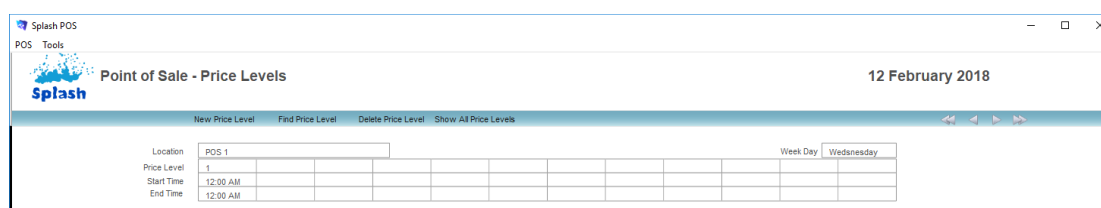
- [illegible]

Finding a Price Level Entry

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Price Settings** on the left of your screen.
3. Click the **Find Price Level** button displayed in the blue stripe at the top of your screen to display a blank Location form.



4. The Point of Sale – Price Levels screen will change to find mode (small magnifying glasses will be displayed in each field).



Location	POS 1	Week Day	Wednesday
Price Level	1		
Start Time	12:00 AM		
End Time	12:00 AM		

5. Enter the criteria for your find in the appropriate field/s.
6. Press ENTER to complete the find.

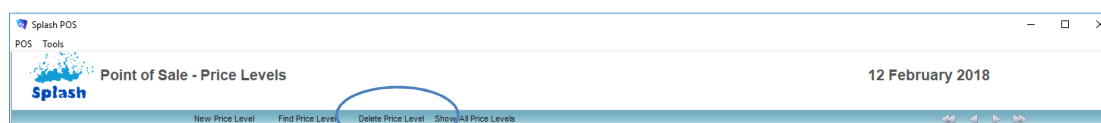
Updating Price Level Details

1. Use the **Finding a Price Level Entry** command to locate the record you wish to update.
2. The Price Level entry form should be displayed on your screen.
3. Update any details as required.

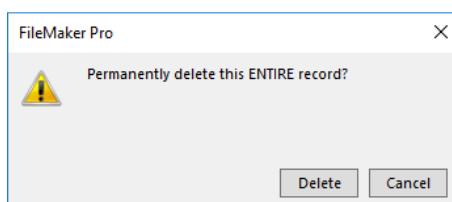
Deleting a Price Level Record

Price Setting records can be deleted from the Price Level entry form. Deleting a Price Level will prevent Splash from applying a special price when a sale is made.

1. Ensure the appropriate Price Level record is displayed on your screen.
2. Click once on the **Delete Price Level** button displayed in the blue stripe at the top of your screen.



3. You will be asked to confirm you wish to delete the selected Price Level record.



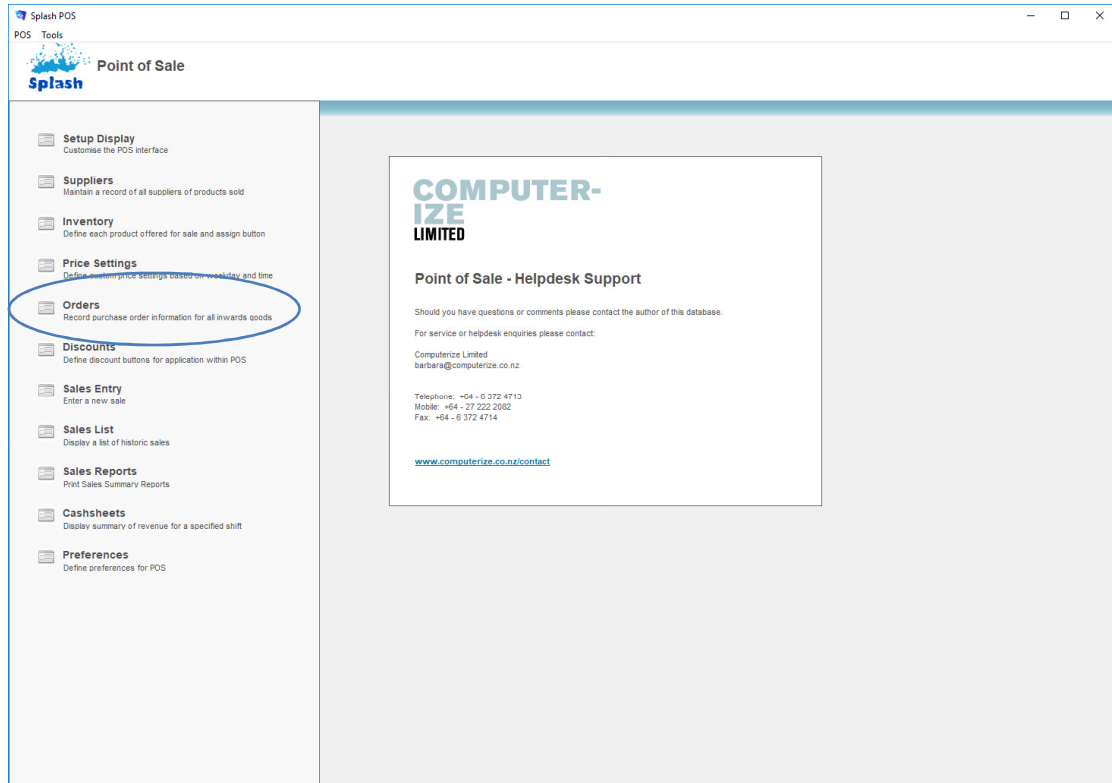
4. Click Delete to remove the record, or Cancel to return to the Price Level form without making any changes.

Ordering New Stock

To ensure correct inventory levels are maintained within Splash POS all new stock should be receipted into your POS system. This involves generating a purchase order whenever new stock is either ordered or received. Correct use of Inventory and Orders allows you to correctly monitor your stock levels.

Creating a New Order

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Orders** on the left of your screen.



3. Click the **Add Order** button displayed in the blue stripe at the top of your screen to display a blank Order form.

Splash POS
POS Tools

Point of Sale - Orders 12 February 2018

Filter By Supplier Name: All

12/02/18 OPEN

Order Date: 12/02/2018 Order Number: 46 Status: OPEN

Supplier Code: MW Moore Wilson

Location: POS 1 Ordered By:

Stock Number	Stock Name	Carton Size	Order Units	Units Ordered	Received	UnitEx \$	TotalEx \$
4041	Freddo Frog						
4042	Chupa Chups	1					
4050	Small Snake	20					
4060	Nestea						

Delivery Instructions

Subtotal
Freight
Tax \$0.00 10%
Total \$0.00

- Define which supplier the order is being placed with by selecting the supplier ID from the drop-down menu provided.
- Use the Location drop-down menu to define the location the stock items will be added to.
- The Stock Number field will display a list of items sold by the selected supplier. Select the item/s you wish to order by choosing each item from the drop-down menu provided.

Splash POS
POS Tools

Point of Sale - Orders 12 February 2018

Filter By Supplier Name: All

12/02/18 OPEN

Order Date: 12/02/2018 Order Number: 46 Status: OPEN

Supplier Code: MW Moore Wilson

Location: POS 1 Ordered By:

Stock Number	Stock Name	Carton Size	Order Units	Units Ordered	Received	UnitEx \$	TotalEx \$
4041	Freddo Frog						
4042	Chupa Chups	1					
4050	Small Snake	20					
4060	Nestea						

Delivery Instructions

Subtotal
Freight
Tax \$0.00 10%
Total \$0.00

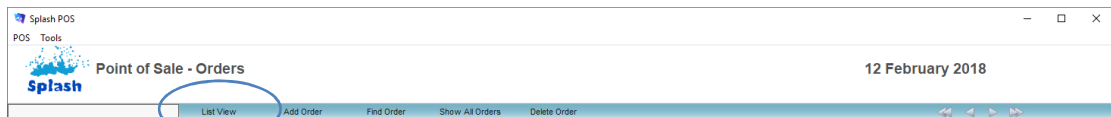
- Enter the required number of items in the Units Ordered column.

- Click the POS Menu button to complete the entry and return to the POS home screen.

Displaying a List of Orders

Each record in the Purchase Order module can be displayed in either the form view or as part of a list. List view displays all records in the found set.

- Ensure the POS Administration options are displayed on your screen.
- Click once on the icon beside the word **Orders** on the left of your screen.
- The Order entry screen will be displayed.
- Click once on the **List** button displayed in the blue stripe at the top of your screen.



- All records in the found set will be displayed on your screen.

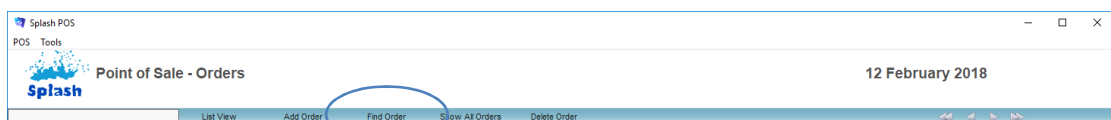
Sort By	Date	Order No	Supplier	Status	Supplier Inv	Order Total	Ordered By
	12/2/2018	46	Moore Wilson	OPEN		\$0.00	
	1/2/2018	47	Funky Trunks	Closed		\$0.00	
	12/1/2018	48	Speedo	Closed		\$0.00	

NB: Display the detail of a selected order by clicking the magnifying glass displayed to the left of the Order Date.

NB: Sort the list in ascending order by selecting the sort by drop-down menu on the top left corner of your screen.

Finding a Purchase Order

- Ensure the POS Administration screen is displayed (see Administering Point of Sale).
- Click the icon to the left of the word **Orders** on the left of your screen.
- Click once on the **Find Order** button displayed in the blue stripe at the top of your screen.



- The Search for an Order dialog box will be displayed on your screen.

Search for an Order

Supplier ID:

Supplier:

Order Date: Order No:

Ordered By:

Status:

Order Items

Stock No:

Stock Name:

Qty Ordered:

Qty Received:

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

5. Enter the criteria for your find in the appropriate field/s.
6. Press ENTER or click the **Find Now** button to complete the find.
7. If one record is located the record will be displayed on the Order form. If multiple records are located the found set will be displayed in the list view.

Updating an Existing Order

1. Use the **Finding a Purchase Order** command to locate the Purchase Order you wish to update.
2. The Order entry form should be displayed on your screen.
3. Update any details as required.

NB: There are some restrictions on what can be updated after an order has been closed.

Receiving Items Into Stock

1. Use the **Finding a Purchase Order** command to locate the Purchase Order you wish to update.
2. The Order entry form should be displayed on your screen.

Splash Point of Sale - Orders 12 February 2018

Filter By Supplier Name:

All

12/02/18 OPEN

01/02/18 Closed

12/01/18 Closed

List View Add Order Find Order Show All Orders Delete Order
Status: OPEN

Order Date: 12/02/2018

Supplier Code: MW Moore Wilson

Location: POS 1

Order Number: 46

Ordered By:

Stock Number	Stock Name	Carton Size	Order Units	Units Ordered	Received	UnitEx \$	TotalEx \$
4041	Freddo Frog	20	1	20	20	\$0.00	\$0.00
4042	Chupa Chups	60	1	60	60	\$0.00	\$0.00
4050	Small Snake	20	1	20	20	\$0.00	\$0.00
4060	Nestea	16	1	16	16	\$0.00	\$0.00

Delivery Instructions

Subtotal: \$0.00

Freight:

Tax: \$0.00 10%

Total: \$0.00

3. Enter the quantity received for each stock item
4. Click the Splash Menu button or select another order to update the entry and return to the POS home screen.

Splash POS
POS Tools
Point of Sale - Inventory
12 February 2018

Filter By Product Name: Show All
ch
Chips
Chupa Chups
Flipper Children's

Stock Information
Stock Number: 4042
Long Description: Chupa Chups
Cost Price: Opening Qty: 22

Stock Name (Button Display): Chupa Chups

Button Display & Barcodes
POS Button Display: Chupa Chups
R: 100 G: 255 B: 200

Supplier: Reporting Codes:

Position: POS 1 99 Canteen Chupa Chups
POS 1 99 Common Chupa Chups

Retail Prices
TAX: NO TAX Tax Rate 10%

Title	Retail	2	3	4	5	6	7	8	9	10	11	12
Price inc	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Price net	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
GST \$	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Margin %	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Margin \$	\$0.55	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Markup %												
Markup \$												

Stock Levels
Opening Date: 22/09/2013
Opening Qty: 22
Qty Sold: 2
Qty Received: 60
Qty on Hand: 80

Reporting
Group: Kiosk
Category: Confectionary
Type: MYOB Code

Additional Information
Minimum Level: Peak Level: ReOrder Level: On Order: 0

NB: The Qty Received field in the Inventory item record will be updated when new stock is received as per the above instructions.

Deleting a Purchase Order

Purchase order records can be deleted from within either the Order entry form or list view. They can only be deleted if the stock has not been received.

1. Use the **Finding a Purchase Order** command to locate the Purchase Order you wish to update.
2. The Order entry form should be displayed on your screen.
3. If working in List View, click the magnifying glass to display the Order entry form.
4. Click once on the **Delete Order** button displayed in the blue stripe at the top of your screen.

Splash POS
POS Tools
Point of Sale - Orders
12 February 2018

List View Add Order Find Order Show All Orders Delete Order

5. You will be asked to confirm you wish to delete the selected Purchase Order record.

Delete Order

Are you sure you want to delete the cancelled order for Funky Trunks?

OK Cancel

6. Click OK to delete the record, or Cancel to return to the Order form without making any changes.

NB: You cannot delete an order if items have already been received into stock.

Invalid Request

Stock has been received on this order. You cannot delete an order with stock received.

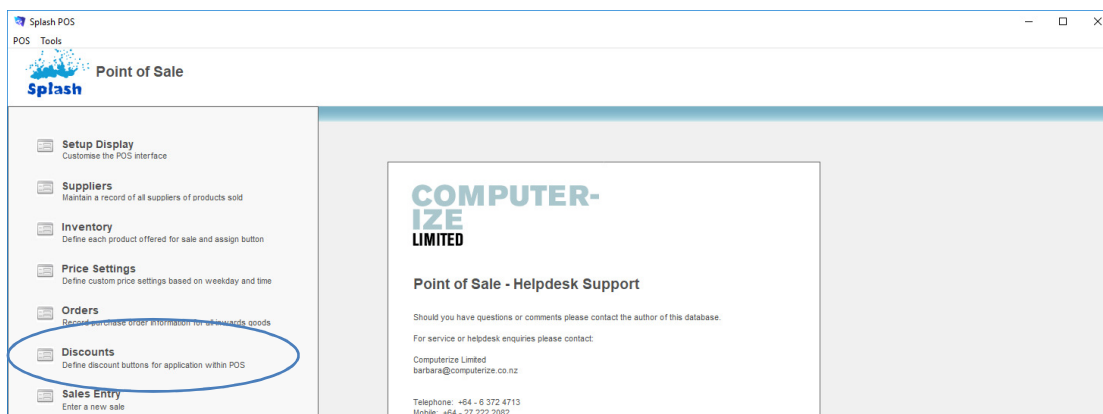
OK

Creating Discount Buttons

Discount buttons can be used to apply preset discounts as either amounts or percentages to products during the sale process. Discount buttons can only be used with the sale of products. See the bookings guide for applying a lesson discount.

Defining a Discount Button

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Discounts** on the left of your screen.



3. Click the **Add Discount** button displayed in the blue stripe at the top of your screen to display a blank Discount form.

[illegible]

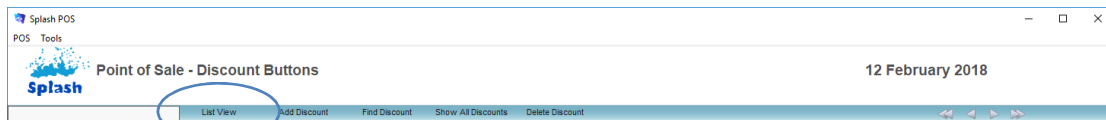
4. The Discount ID will be automatically assigned. Enter a Button Name which will appear within the sale screen to represent the selected discount.
5. Define the Location the button should appear on e.g. POS 1.
6. Define the discount amount as either a percentage or dollar value.
7. Enter RGB settings to define the colour of your new discount button.
8. Define a date to begin and end the promotion. If the discount is ongoing, enter 31/12/99 in the Date Ends field.

- Click the Splash Menu button to complete the entry and return to the POS home screen.

Displaying a List of Discount Buttons

Each record in your Discount module can be displayed in either the form view or as part of a list. List view displays all records in the found set.

- Ensure the POS Administration screen is displayed (see Administering Point of Sale).
- Click once on the icon beside the word **Discounts** on the left of your screen.
- Click once on the **List View** button displayed in the blue stripe at the top of your screen.



- All records in the found set will be displayed in the list.

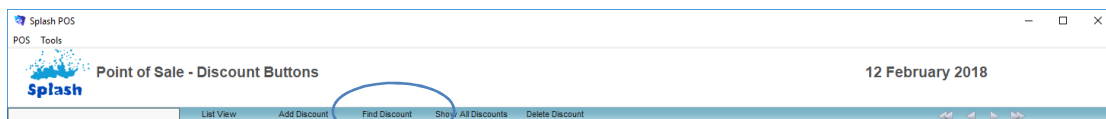
 A screenshot of the 'Point of Sale - Discount Buttons' window showing a list of discount buttons. The window title bar shows 'Splash POS' and 'POS Tools'. The main header area displays the 'Splash' logo, the title 'Point of Sale - Discount Buttons', and the date '12 February 2018'. Below the header is a blue stripe containing several buttons: 'Detail View', 'Add Discount', 'Find Discount', 'Show All Discounts', and 'Delete Discount'. Below the stripe is a table with the following columns: ID, Button Name, Location, Category, Type, \$ Disc, % Disc, Begins, and Ends. The table contains four rows of data.

ID	Button Name	Location	Category	Type	\$ Disc	% Disc	Begins	Ends
PM0143	\$1 Off	POS 1	Special	Dollar	\$1.00		01/01/07	31/12/99
PM0141	Management	POS 1	Management	Percentage		100.00%	01/01/07	31/12/99
PM0126	Staff Discount	POS 1	Staff Discount	Percentage		15.00%	01/01/07	31/12/99
PM0140	VP	POS 1	Valued Customer	Percentage		10.00%	01/01/07	31/12/99

NB: Display the detail of a selected discount button by clicking the magnifying glass displayed to the left of the record ID.

Finding a Discount Button

- Ensure the POS Administration screen is displayed (see Administering Point of Sale).
- Click once on the icon beside the word **Discounts** on the left of your screen.
- Click once on the **Find Discount** button displayed in the blue stripe at the top of your screen.



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

Search for a Discount Button

Promo ID

Button Name

Location

Category

Discount Type

Percent Off

Dollar Off

Date Begins

Date Ends

Requested By

Authorised By

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

5. Enter the criteria for your find in the appropriate field/s.
6. Press ENTER or click the **Find Now** button to complete the find.

Updating Discount Button Details

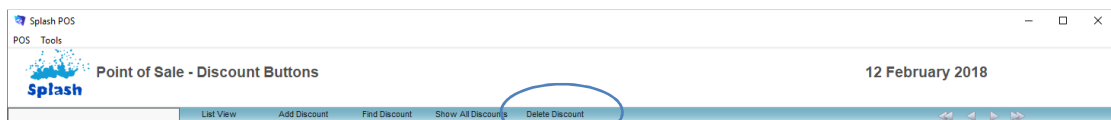
1. Use the **Finding a Discount Button** instructions to locate the record you wish to update.
2. The Discount Button entry form should be displayed on your screen.
3. Update any details as required.

NB: Amending an existing discount button will only affect future use of the button. All existing transactions will not be affected.

Deleting a Discount Button

Discount Button records can be deleted from within either the entry form or list view.

1. Use the **Finding a Discount Button** instructions to locate the record you wish to delete.
2. Ensure the appropriate Discount Button record is displayed on your screen.
3. If working in List View, click the magnifying glass to display the Discount Button entry form.
4. Click once on the **Delete Discount** button displayed in the blue stripe at the top of your screen.



5. You will be asked to confirm you wish to delete the selected record.

Delete Discount

Are you sure you want to delete the discount button for Staff Discount?

Buttons: OK, Cancel

6. Click OK to delete the record, or Cancel to return to the Discount form without making any changes.

Reviewing Discounted Sale Items

Splash POS maintains a history of all discounted items. This section of the manual describes how you can review the discounts which have been applied.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Discounts** on the left of your screen.
3. Use the **Finding a Discount** instructions to locate the record you wish to review.
4. All instances where the discount button has been used will be displayed within the portal on the right of the screen.

Splash POS
POS Tools

Point of Sale - Discount Buttons 12 February 2018

Filter By Discount Name: All

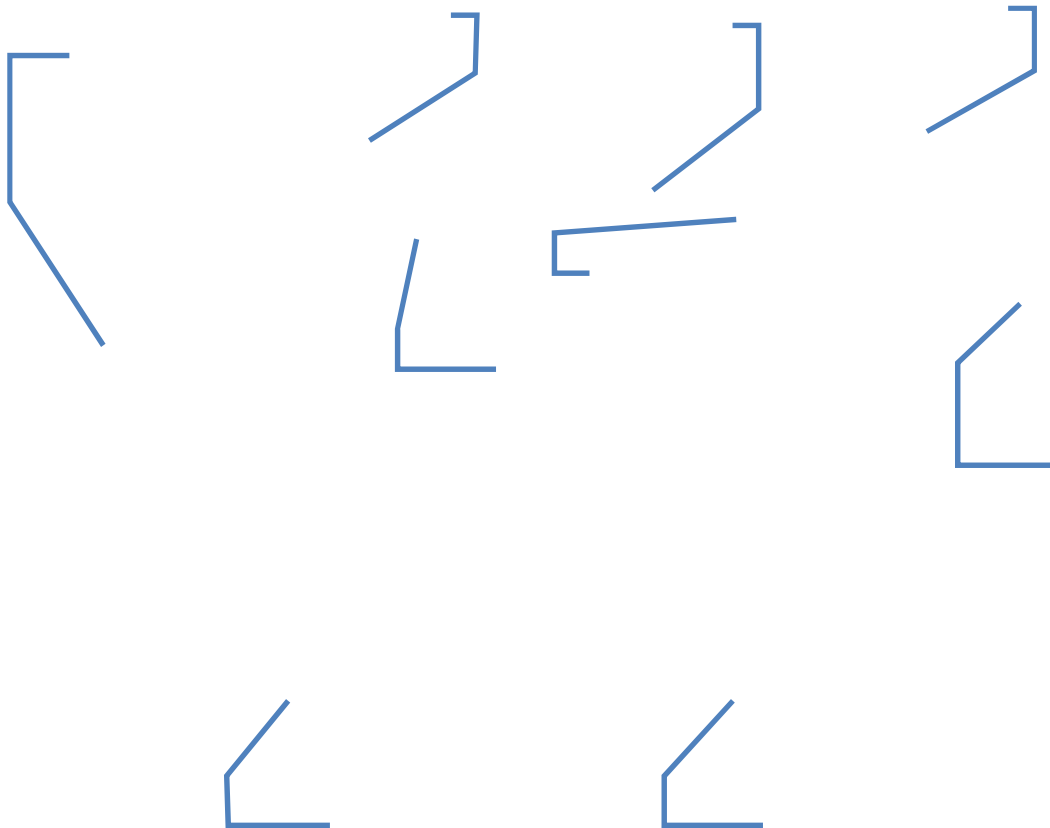
Discount ID: PMD128
Button Name: Staff Discount
Location: POS 1
Category: Staff Discount
Discount Type: Percentage
Percent Off: 15%
Date Begins: 1/1/2007
Date Ends: 31/12/2099
Requested By:
Authorised By:
Button Colour:
R: 15 G: 155 B: 155

Discounts Applied

Date	Sale ID	Inventory Item	Amt Applied
3/02/15	14717	Maske Goggles	\$4.50
27/06/14	14694	Meteor	\$2.84
27/06/14	14694	Meteor	\$2.84
20/04/14	14675	Nestle	\$0.53
9/04/14	14668	450ml Coke Product	
22/09/13	14654	Pop Top	-\$0.50
22/09/13	14656	Small Snake	-\$3.90

Entering Sales and Processing Payments

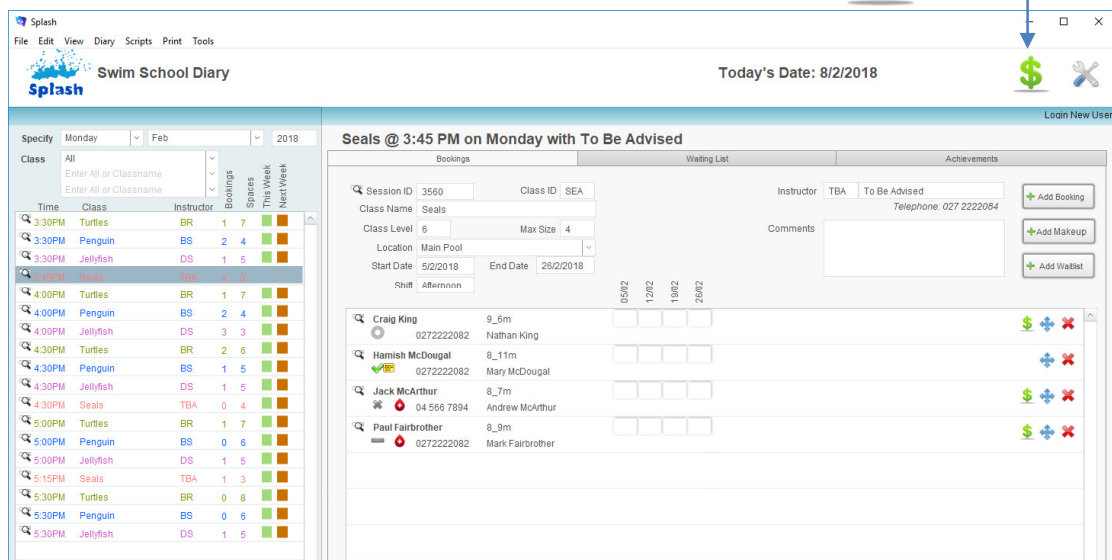
Parts of the POS Window

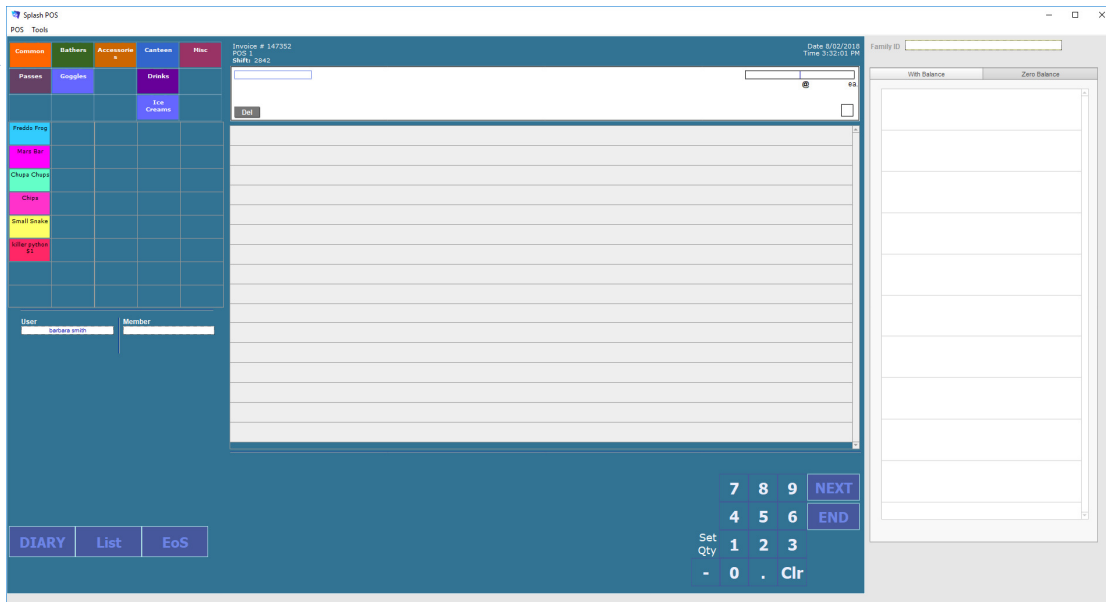


Processing a Sale

Entering a Quick Sale for Products

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the window.

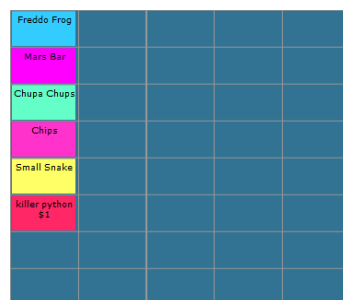




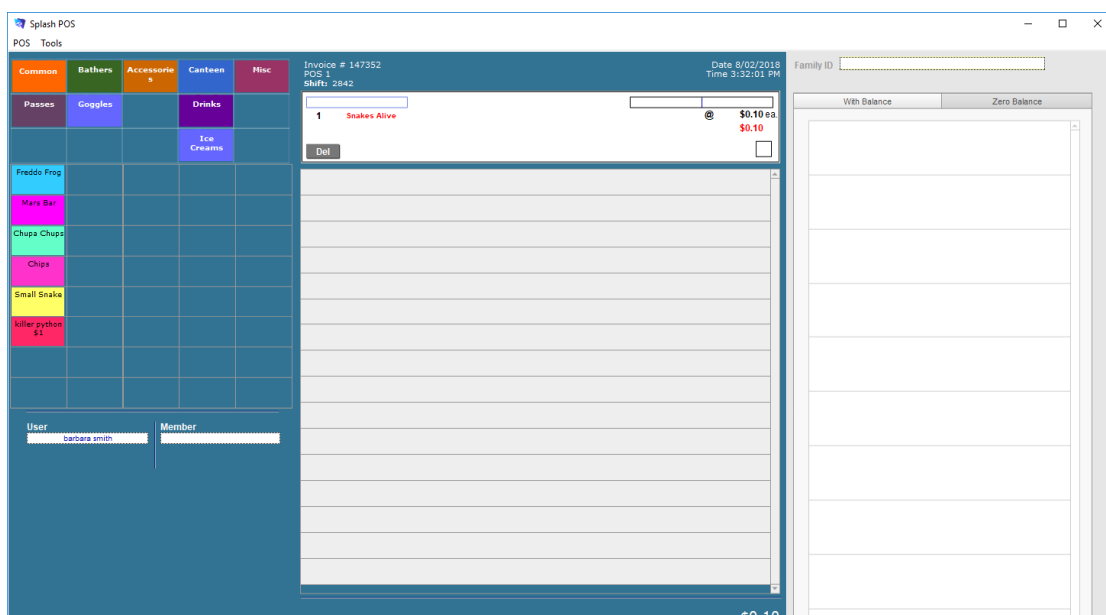
3. The POS interface will be displayed on your screen.
4. Use the panel on the top left of the screen to select the category which contains the button for the item being sold.



5. Click once on the product you wish to include in your sale.



6. The item you have selected will move across to the Sale Item box



Invoice # 147352
POS 1
Shift: 2842
Date: 8/02/2018
Time: 3:32:01 PM

1 Snakes Alive @ \$0.10 ea
\$0.10

Del

7. If you are selling multiple items of the same product click the **Clr** button, then select the actual quantity being sold.

7	8	9
4	5	6
1	2	3
0	.	Clr

8. Repeat steps 4 through 7 until all products have been define for the sale.
9. As you enter additional items they will move further down the scree within the sale items area of the screen.

Invoice # 147352
POS 1
Shift: 2842
Date: 8/02/2018
Time: 3:32:01 PM

1 Cornetto @ \$3.50 ea
\$3.50

Del

1	Snakes Alive	\$0.10
1	Chupa Chups	\$0.60
1	Mars Bar	\$2.00
1	Freddo Frog	\$0.60
1	Aquastream	\$12.95

10. When all items have been defined, click the **END** button.

END

11. You will be asked to define the payment method for the selected sale. Choose EftPOS or Cash to complete the sale and return to the POS screen. Click Cancel to export the dialog box without completing the sale.

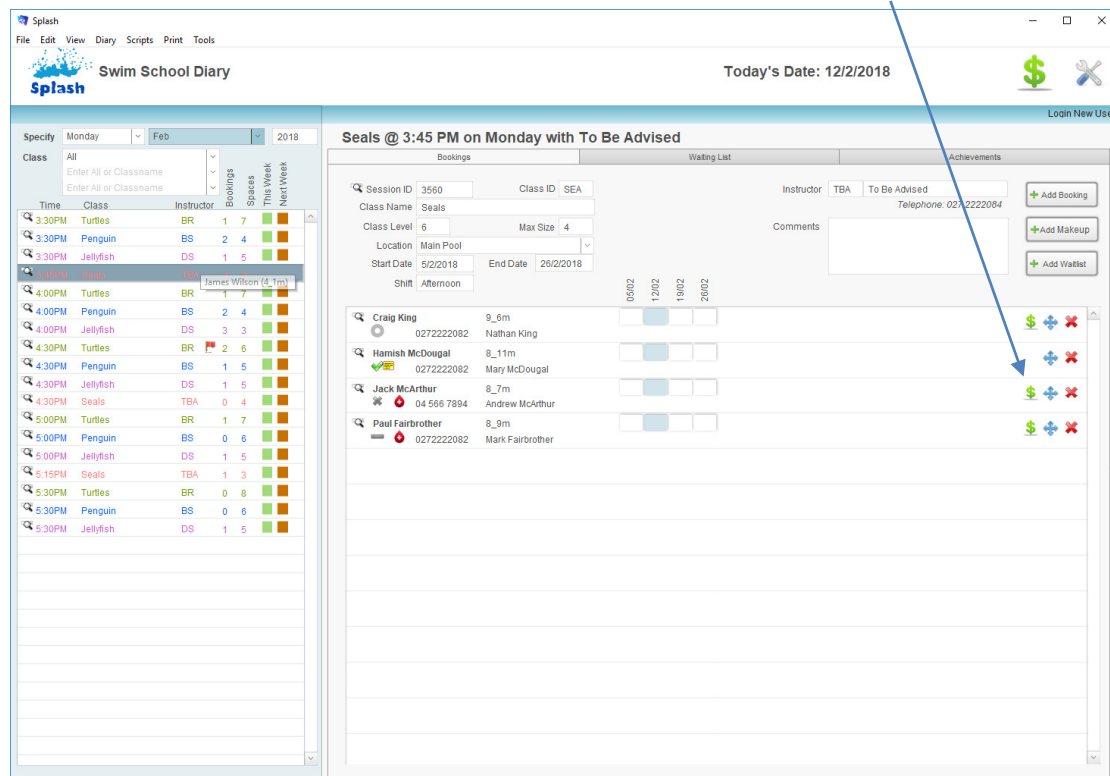
Payment Method

Cancel EftPOS Cash

Entering a Quick Sale for a Booking

Clicking the green dollar symbol displayed within the booking line triggers a quick sale for the selected booking. After selecting the dollar sign a sale will be created, the family will be selected and the selected booking information will be added to the sale.

7. Ensure the Diary is displayed on your screen.
8. Click the \$ displayed in the row for the booking you wish to pay.



9. The POS interface will be displayed on your screen.
10. The selected booking will be moved to the sale item portal and all bookings for the selected family will be displayed in the panel on the right of the screen.

Splash POS
POS Tools

Invoice # 147371
POS 1
Shift: 2842
Date: 12/02/2018
Time: 11:30:11 PM
Andrew McArthur

Family ID: 23
MCARTHUR (Andrew McArthur)

With Balance: \$22.00 ea.
Zero Balance: \$22.00

1 Jack McArthur - Seals - 3:45 PM Mon (Block Feb 2018)

Del

Set Qty: 1 2 3
- 0 . Clr

DIARY List EoS

7 8 9 NEXT
4 5 6 END
1 2 3
- 0 . Clr

With Balance: \$54.00
Zero Balance: \$54.00

Jack McArthur
Seals - 3:45 PM Mon (Term Jun 2017)

Percent Disc 10 \$90.00

Jack McArthur
Seals - 3:45 PM Mon (Term Jul 2017)

Percent Disc 10 \$72.00

Jack McArthur
Seals - 3:45 PM Mon (Term Aug 2017)

Percent Disc 10 \$72.00

Jack McArthur
Seals - 3:45 PM Mon (Term Sep 2017)

Percent Disc 10 \$72.00

Jack McArthur
Seals - 3:45 PM Mon (Term Oct 2017)

Percent Disc 10 \$72.00

Jack McArthur
Seals - 3:45 PM Mon (Block Nov 2017)

Percent Disc 10 \$72.00

Jack McArthur
Seals - 3:45 PM Mon (Block Dec 2017)

Percent Disc 10 \$54.00

Jack McArthur
Seals - 3:45 PM Mon (Block Jan 2018)

Percent Disc 10 \$54.00

Melanie McArthur
Penguin - 3:30 PM Wed (Block Jan 2018)

Percent Disc 10 \$72.00

Melanie McArthur
Penguin - 3:30 PM Wed (Block Feb 2018)

Percent Disc 10 \$72.00

11. Select additional bookings or amend the payment amount of the existing item.

12. When all items for the sale have been selected, click the END or NEXT button to complete the sale.

END

Entering a Sale for a Combination of Bookings and Products

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the window.



Splash POS
POS Tools

Invoice # 147352
POS 1
Shift: 2842
Date: 8/02/2018
Time: 3:32:01 PM

Family ID:

With Balance: \$0.10 ea.
Zero Balance: \$0.10

1 Snakes Alive

Del

Set Qty: 1 2 3
- 0 . Clr

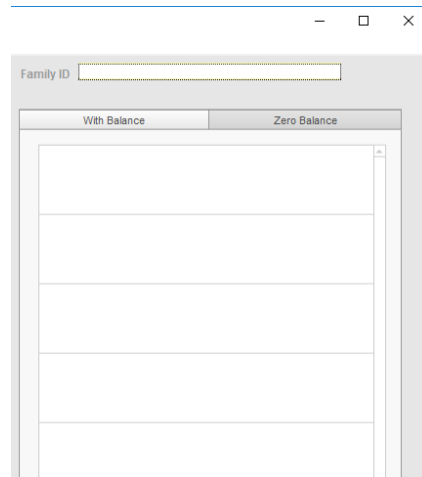
DIARY List EoS

7 8 9 NEXT
4 5 6 END
1 2 3
- 0 . Clr

With Balance: \$0.10
Zero Balance: \$0.10

3. The POS interface will be displayed on your screen.

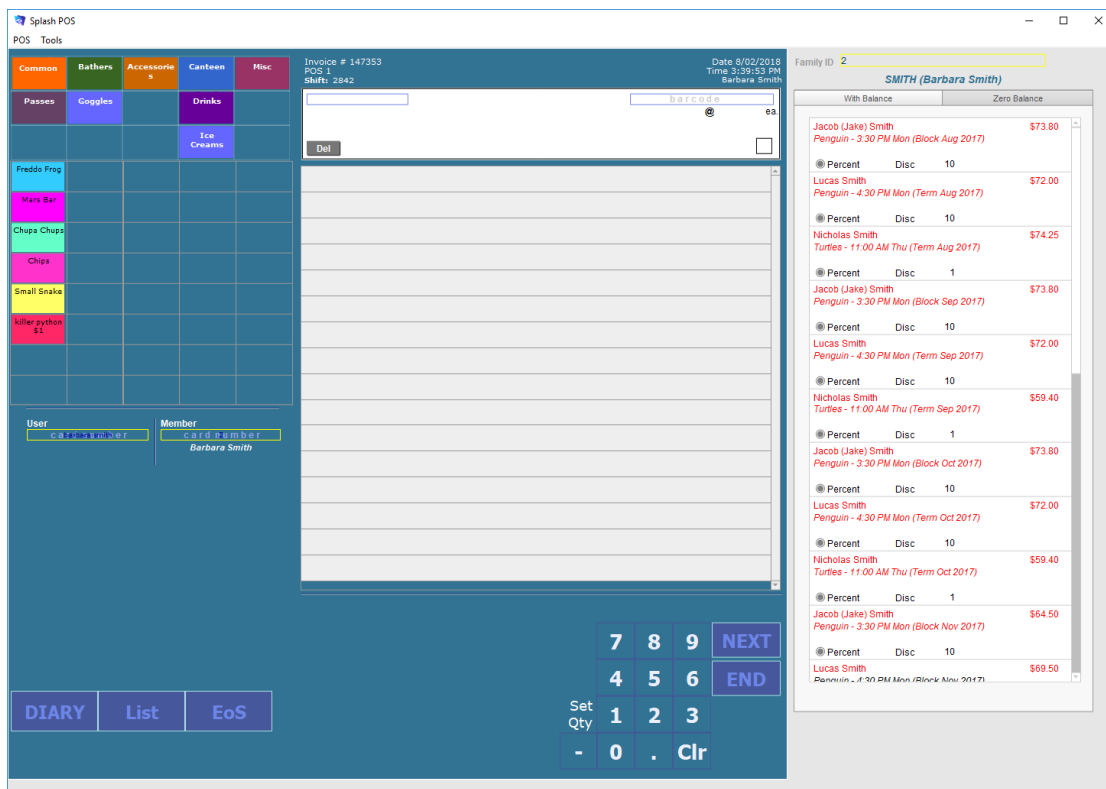
- Click once within the Family ID field on the right of the screen.



- The Select Family dialog will be displayed on your screen. Enter the family name (or part thereof) in the filter field. The content of the list will be revised as you type.



- When you have identified the correct family simply click anywhere within the required row.
- You will be returned to the POS screen, all existing bookings for the selected family will be displayed in the panel on the right of the screen.



- Click once on the booking you wish to enter a payment for. The booking details will be copied to the sale item area of the screen.

Invoice # 147353 Date 8/02/2018
 POS 1 Time 3:39:53 PM
 Shift: 2842 Barbara Smith

Lesson	barcode	
1 Nicholas Smith - Turtles - 11:00 AM Thu (Term Sep 2017)	@	\$59.40 ea. \$59.40

Del ☐

9. Repeat step 9 until all bookings have been defined for the sale.

Invoice # 147353 Date 8/02/2018
 POS 1 Time 3:39:53 PM
 Shift: 2842 Barbara Smith

Lesson	barcode	
1 Nicholas Smith - Turtles - 11:00 AM Thu (Term Sep 2017)	@	\$59.40 ea. \$59.40
1 Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block Aug 2017)		\$73.80
1 Lucas Smith - Penguin - 4:30 PM Mon (Term Aug 2017)		\$72.00
1 Nicholas Smith - Turtles - 11:00 AM Thu (Term Aug 2017)		\$74.25
1 Lucas Smith - Penguin - 4:30 PM Mon (Term Sep 2017)		\$72.00

Del ☐

10. When all bookings have been added, use the left panel of the screen to select the products which need to be added.

11. You are now ready to add products to your sale. Select the Product Category which contains the button for the item being sold.

Common	Bathers	Accessories	Canteen	Misc
Passes	Goggles		Drinks	
			Ice Creams	

12. Click once on the product you wish to include in your sale.

Pop Top	Powerade			
450ml Coke Product	375ml Milk			
Fruit Box	500ml milk			
Mt Franklin	Coffee \$4			
Pump	Water \$2			
Mini Pump				
Vitamin Water				
Nestle				

13. The item you have selected will move across to the top of the Sale Item box

1	600ml water	@	\$2.00 ea. \$2.00
---	-------------	---	----------------------

Del ☐

14. Repeat steps 10 through 12 until all products have been defined for the sale.

15. When all items have been selected, click the END button.

16. You will be asked to define the payment method for the selected sale. Choose EftPOS or Cash to complete the sale and return to the POS screen or click Cancel to return to the sale without processing the payment.

END

Defining Alternative Payment Methods

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the window.



3. The POS interface will be displayed on your screen.
4. Click once in the Family ID field on the right of the screen.
5. The Select Family dialog will be displayed on your screen. Enter the family name (or part thereof) in the filter field. The content of the list will be revised as you type.

Smith	Unknown	0272222082		
Smith	Bridget	0272222082	1243 Any Street, Wellington	
Smith	Barbara	0272222082	6A Eriestoke Crescent, Churton Park, Wellington 4001	Jacob, Sam, Nicholas, Lucas
Smith	Daniel	0272222082	89 Roberta Road, Tawa 4008	Jason, Phillip, Jennifer, John

6. When you have identified the correct family simply click anywhere within the required row.
7. You will be returned to the POS screen, all existing bookings for the selected family will be displayed in the panel on the right of the screen. This area is displayed in two cards ; with balance and zero balance.

8. Click once on the booking you wish to process a payment for. The booking details will be copied to the sale item area of the screen.
9. Repeat step 8 until all bookings have been defined for the sale.
15. When all bookings and products have been defined for the sale, click the **Next** button to define the method of payment.
16. The End Sale dialog will be displayed on your screen.



17. Choose the payment method by clicking the appropriate payment buttons on the left of your screen.

CASH	EFTPOS	CREDIT CARD
GIFT VOUCHER	CHEQUE	AMEX
INTERNET	MANAGEMENT	PROMO
DIRECT DEBIT	SESSION PASS	JOURNAL

18. Payments may be split across multiple payment types. Simply select the required method of payment and update the amount being paid for each selection.

DEL	CreditCard	2842	\$200.00
DEL	Cash	2842	151.45
DEL			

19. To complete the sale, click the **End** button.

END

Removing an Item from the Sale

An item may be deleted from the sale while it is displayed at the top of the sale item screen. If the item you wish to remove is not displayed at the top of the list, simply click on it to return it to the top. An item cannot be removed from the sale after the sale has been completed.

The screenshot shows the Splash POS interface. On the left is a menu with categories like Common, Bathing, Accessories, Canteen, and Misc. The main area displays an invoice for 'Nicholas Smith - Turtles' with a total of \$59.40. Below this is a list of items, including 'Jacob (Jake) Smith - Penguin' and 'Lucas Smith - Penguin'. The 'Del' button is highlighted on the first item. On the right, a summary window shows the total sale amount of \$351.45 and a list of items with their respective prices and discounts.

1. Ensure the item you wish to remove is displayed in the sale item area at the top of the screen.
2. If the item is not displayed at the top of the list, simply click the required item.
3. Click the **Del** button
4. Complete your sale by clicking the End or Next button.

Discounting a Sale Item



1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the screen.
3. The POS interface will be displayed on your screen.
4. Select the product you wish to sell.
5. A discount can be applied to an item while it is displayed at the top of the sale item list.
6. Click the Discount box at the right of the sale item screen to display the Staff Discount screen.

Invoice # 147355
POS 1
Shift: 2842
Date: 8/02/2018
Time: 3:49:49 PM

1 Vorgee Missile Goggles @ \$30.00 ea
\$30.00

Del

Thursday, 8 February 2018 3:51pm User

Invoice Number: 147355

STAFF DISCOUNT

STAFF DISCOUNT
VIP
MANAGEMENT
\$1 OFF

POS 1

Item Name
Vorgee Missile Goggles

Quantity
1

Item Price/Payment Amount
\$30.00

Amend Price
\$29.00

Amount Applied (per item)
\$1.00

Cancel Commit

7. Either click an existing discount button or enter the amended price on the right of the screen.
8. Click Commit to return to your sale screen.
9. A cross will be displayed in the discount box when an item has been discounted.

1 Vorgee Missile Goggles @ \$29.00 ea
\$29.00

Del

10. Complete your sale by clicking the **End** or **Next** button.

NB: A history of all discounts is recorded in the Discounts area of Splash POS.

Applying a Part Payment to a Booking

Part payments are only available for bookings. Products must be paid in full at the time of purchase.



1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the screen.
3. The POS interface will be displayed on your screen.
4. Select the booking you wish to process a payment for.
5. A part payment can only be defined while the booking appears in the sale item area at the top of the list.
6. Click the unit price written in black.



7. The Part Payment of Booking dialog will be displayed on your screen.
8. Enter the amount of the payment you would like to apply and click OK.

9. The booking will be displayed with a revised unit price..



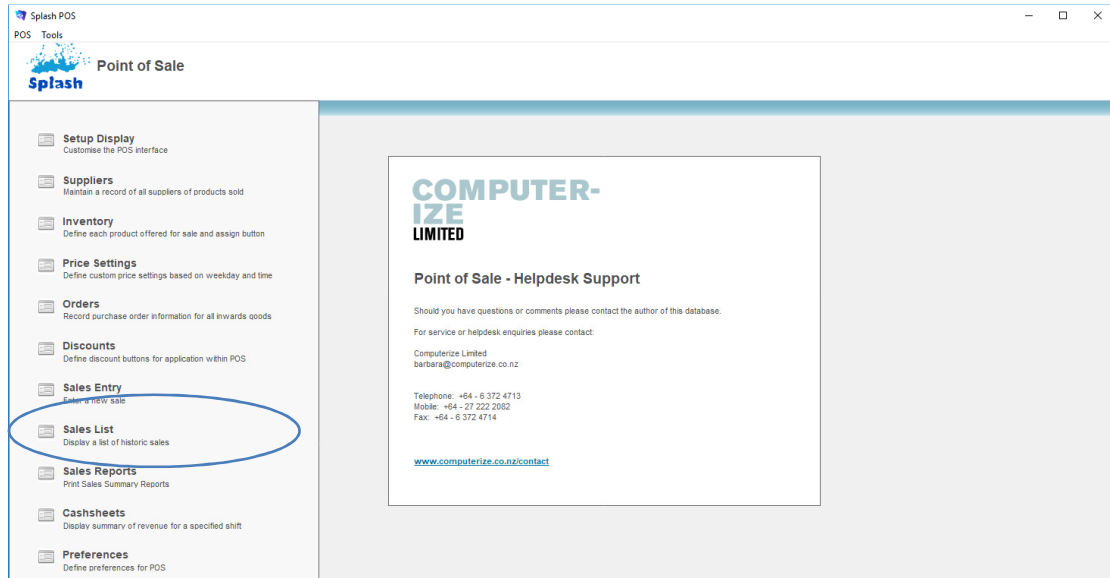
10. Repeat steps 4 through 9 until all relevant bookings have been selected.
11. Complete your sale by clicking the **End** or **Next** button.

NB: The above command does not reduce the price of the initial booking, it simply applies a part payment to the outstanding balance.

Viewing a List of Sales

Each record in your Sales module can be displayed as part of a list. List view displays all records in the found set.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon to the left of **Sales List** on the left of your screen.



3. A list of sales will be displayed on your screen.

The screenshot displays the 'Point of Sale - Sales List' screen for the date 12 February 2018. It features a table with the following columns: Date, Sale ID, Family ID, Family, Item Total, Sale Total, Tax, Receipt, Amt Paid, Payment Type, Shift, Location, and Ended. The table contains 15 rows of sales data. Two blue arrows point from the 'View Receipt' and 'Print Receipt' labels to the magnifying glass and printer icons in the 'Receipt' column, respectively.

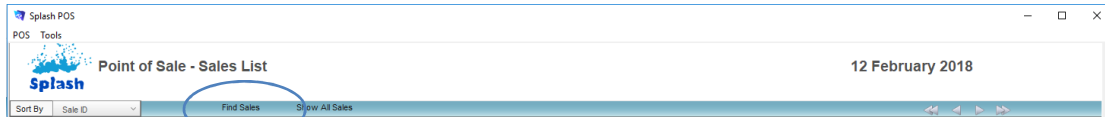
Sort By	Sale ID	Find Sales	Show All Sales	Item Total	Sale Total	Tax	Receipt	Amt Paid	Payment Type	Shift	Location	Ended
25/01/2018	4:01 PM	147323	15	THOMSON (Anthony Thomson)	\$85.00	\$85.00	\$0.00	\$85.00	Cash	2842	POS 1	X
25/01/2018	4:02 PM	147324	2	SMITH (Barbara Smith)	\$125.00	\$125.00	\$0.00	\$125.00	Eftpos	2842	POS 1	X
25/01/2018	4:03 PM	147325	21	WILLIAMS (Malcolm Williams)	\$75.00	\$75.00	\$0.00	\$75.00	Eftpos	2842	POS 1	X
25/01/2018	4:03 PM	147326			\$0.00	\$0.00	\$0.00	\$0.00		2842	POS 1	
25/01/2018	4:10 PM	147327	2	SMITH (Barbara Smith)	\$0.00	\$0.00	\$0.00	\$0.00	Journal	2842	POS 1	X
25/01/2018	4:10 PM	147328	15	THOMSON (Anthony Thomson)	\$0.00	\$0.00	\$0.00	\$0.00	Journal	2842	POS 1	X
25/01/2018	4:10 PM	147329	21	WILLIAMS (Malcolm Williams)	\$0.00	\$0.00	\$0.00	\$0.00	Journal	2842	POS 1	X
25/01/2018	4:10 PM	147330	2	SMITH (Barbara Smith)	\$0.00	\$0.00	\$0.00	\$0.00	Journal	2842	POS 1	X
02/02/2018	4:03 PM	147331	20	MCDUGAL (Mary McDougal)	\$72.00	\$72.00	\$0.00	\$72.00	Cash	2842	POS 1	X
02/02/2018	4:03 PM	147332			\$0.00	\$0.00	\$0.00	\$0.00		2842	POS 1	
02/02/2018	4:04 PM	147333	23	MCARTHUR (Andrew McArthur)	\$50.00	\$50.00	\$0.00	\$50.00	Cash	2842	POS 1	X
02/02/2018	4:04 PM	147334			\$0.00	\$0.00	\$0.00	\$0.00		2842	POS 1	
02/02/2018	4:04 PM	147335	18	FAIRBROTHER (Mark Fairbrother)	\$100.00	\$100.00	\$0.00	\$100.00	Cash	2842	POS 1	X

View Receipt

Print Receipt

Finding a Transaction

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon to the left of **Sales List** on the left of your screen.
3. Click once on the **Find Sales** button displayed in the blue stripe at the top of your screen.



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

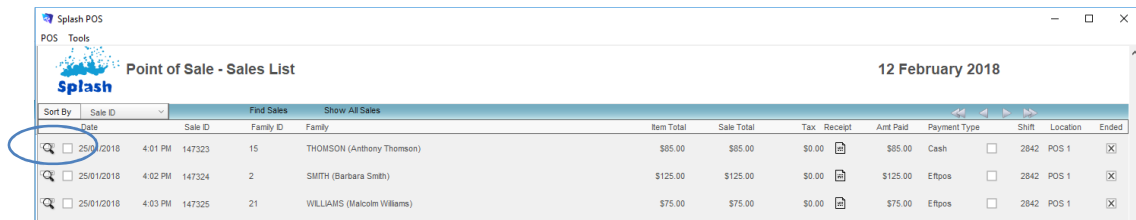
A screenshot of the 'Search for a Sale' dialog box. The dialog has a title bar with a magnifying glass icon and the text 'Search for a Sale'. The main area contains several search criteria fields: 'Location', 'Date', 'Family ID', 'Contact Name', 'Sale ID', and 'Entered By', each with a search icon. There are also checkboxes for 'End Clicked', 'Payment Variation', and 'Payment Date Variation'. At the bottom, there are five buttons: 'Cancel', 'New Request' (with a green plus icon), 'Omit Records' (with a red minus icon), 'Constrain Set', and 'Find Now' (with a magnifying glass icon).

5. Enter the criteria for your find in the appropriate fields.
6. Click the **Find Now** button.
7. The result of your find will be displayed in the list view.

NB: The New Request button can be used to define additional find criteria (e.g. Date = 10/4/05 **AND** Date = 3/4/05).

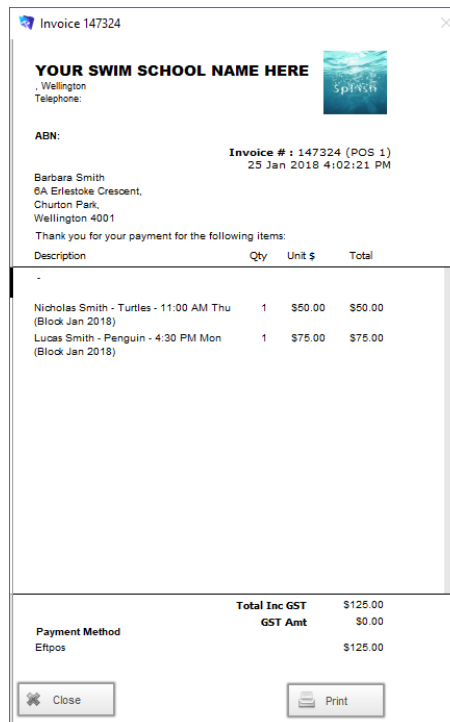
Viewing the Content of a Previous Sale

1. Use the **Finding a Transaction** function to locate the sale record you wish to view.



Sort By	Sale ID	Find Sales	Show All Sales									
Date	Sale ID	Family ID	Family	Item Total	Sale Total	Tax	Receipt	Amt Paid	Payment Type	Shift	Location	Ended
25/01/2018	4:01 PM	147323	15	THOMSON (Anthony Thomson)	\$85.00	\$85.00	\$0.00	\$85.00	Cash	2842	POS 1	X
25/01/2018	4:02 PM	147324	2	SMITH (Barbara Smith)	\$125.00	\$125.00	\$0.00	\$125.00	Eftpos	2842	POS 1	X
25/01/2018	4:03 PM	147325	21	WILLIAMS (Malcolm Williams)	\$75.00	\$75.00	\$0.00	\$75.00	Eftpos	2842	POS 1	X

2. Click the magnifying glass to the left of the transaction you wish to view.



Invoice 147324

YOUR SWIM SCHOOL NAME HERE
Wellington
Telephone:

ABN: Invoice # : 147324 (POS 1)
25 Jan 2018 4:02:21 PM

Barbara Smith
6A Erlestoke Crescent,
Churton Park,
Wellington 4001

Thank you for your payment for the following items:

Description	Qty	Unit \$	Total
Nicholas Smith - Turtles - 11:00 AM Thu (Block Jan 2018)	1	\$50.00	\$50.00
Lucas Smith - Penguin - 4:30 PM Mon (Block Jan 2018)	1	\$75.00	\$75.00

Total Inc GST \$125.00
GST Amt \$0.00

Payment Method
Eftpos \$125.00

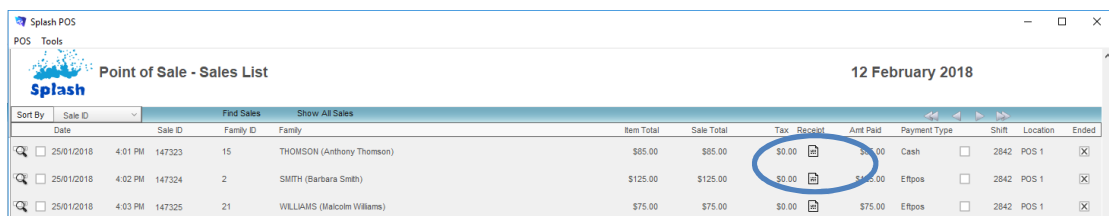
Close Print

3. The selected transaction will be displayed on your screen.
4. Click the Close button to close the dialog without printing, or click the Print button to print a copy of the receipt.

NB: Receipts may also be viewed and reprinted from the Accounts tab card in the family file.

Reprinting a Receipt

1. Use the **Finding a Transaction** function to locate the sale record you wish to reprint.



Sort By	Sale ID	Find Sales	Show All Sales									
Date	Sale ID	Family ID	Family	Item Total	Sale Total	Tax	Receipt	Amt Paid	Payment Type	Shift	Location	Ended
25/01/2018	4:01 PM	147323	15	THOMSON (Anthony Thomson)	\$85.00	\$85.00	\$0.00	\$85.00	Cash	2842	POS 1	X
25/01/2018	4:02 PM	147324	2	SMITH (Barbara Smith)	\$125.00	\$125.00	\$0.00	\$125.00	Eftpos	2842	POS 1	X
25/01/2018	4:03 PM	147325	21	WILLIAMS (Malcolm Williams)	\$75.00	\$75.00	\$0.00	\$75.00	Eftpos	2842	POS 1	X

2. Click the receipt button to the right of the invoice total for the required transaction.

YOUR SWIM SCHOOL NAME HERE
 , Wellington
 Telephone:

ABN:

Invoice # : 147324 (POS 1)
 25 Jan 2018 4:02:21 PM

Barbara Smith
 6A Erlestoke Crescent,
 Churton Park,
 Wellington 4001

Thank you for your payment for the following items:

Description	Qty	Unit \$	Total
Nicholas Smith - Turtles - 11:00 AM Thu (Block Jan 2018)	1	\$50.00	\$50.00
Lucas Smith - Penguin - 4:30 PM Mon (Block Jan 2018)	1	\$75.00	\$75.00
Total Inc GST			\$125.00
GST Amt			\$0.00
Payment Method			
Eftpos			\$125.00

Message

Do you want to PRINT or EMAIL the client receipt?

Cancel Email Print

NB: Receipts may also be viewed and reprinted from the Accounts tab card in the family file.

Changing Receipt Paper Size

The default format for your receipts can be defined as either A5 or 80mm (standard eftpos receipt). Define the format you require by selecting it within the System Defaults.

Splash
 File Edit View Insert Format Records Tools

System Defaults Today's Date: 12/2/2018

Swim School Default Settings

Default City For All New Records

Default Paper Size
☒ A4 ☐ US Letter

Allow Catchup Bookings
☒ Yes ☐ No

Set Automatic Rollover of Bookings
☒ Yes ☐ No

Automatically Print Receipts
 Ask

Documents Bookings Student Lists Shifts Public Holidays Custom Reports

Default Paper Size ☒ A4 ☐ US Letter
 Confirmation and Reminders ☒ A4 ☐ US Letter
 Receipts ☐ A5 ☒ Custom

Display Address on Correspondence ☒ Yes ☐ No
 Display Logo on Correspondence Header ☒ Yes ☐ No
 Display Logo on Report Header ☒ Yes ☐ No

COMPUTER-IZE LIMITED
 Helpdesk Support

NB: Set at Custom for 80mm.

Deleting a Transaction

Splash POS Payment records cannot be deleted. If you have processed a payment in error, you should reverse the payment rather than attempt to delete it.

Reversing a Transaction

A reversal is created by creating an identical transaction, however, enter either the amount or the quantity as a negative rather than a positive value.

1. Ensure the Diary is displayed on your screen.
2. Click the \$ button displayed on the top right of the window.
3. Define the amount of the payment to be reversed by selecting the appropriate products or bookings.
4. If you are returning items to stock, create the reversal by selecting the stock item and entering a negative number in the **Qty** field.
5. If you are not returning items to stock but wish to credit an amount for either a product or a booking simply enter the value of the item as a negative value.
6. To complete the sale, click the **Sale** or **Next** button.



NB: Make sure you select the correct payment method – if you are giving cash back to the client select cash as the payment type.

Printing Point of Sale Reports

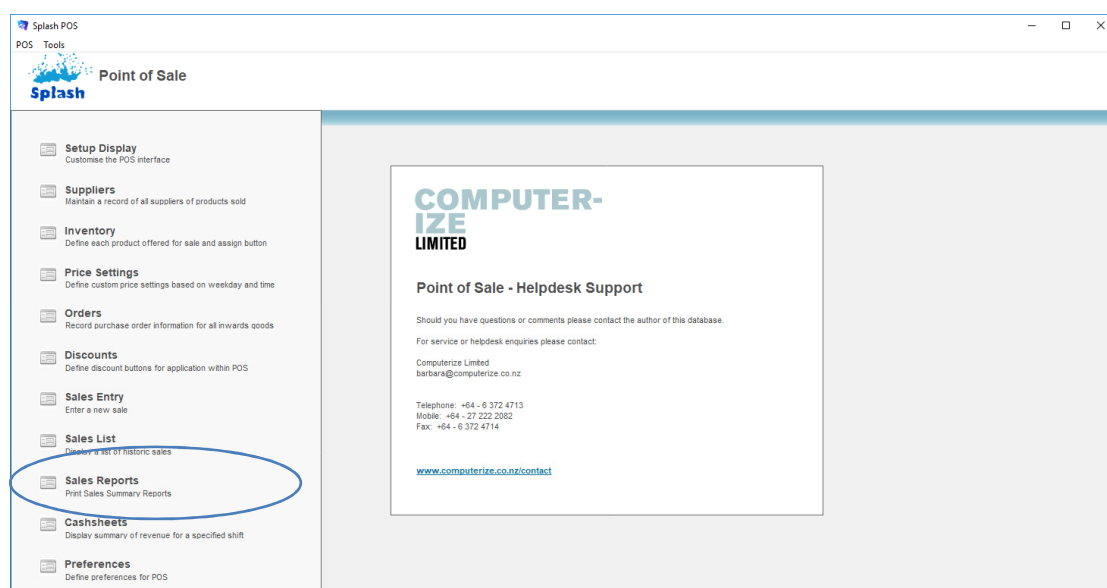
Access to this area of the database is restricted to those with POS setup access. Use this area of the POS system to generate reports which contain summaries of either products sold or monies received.

All reports follow the same four step process.

1. Locate the Data for Reporting
2. Choose Report Format
3. Enter Report Title
4. Produce Report

Generating a Report

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the words **Sales Reports** on the left of your screen.

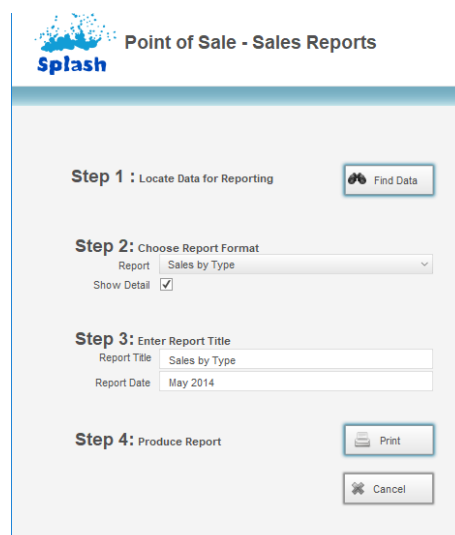


3. The Point of Sale – Sales Reports Screen will be displayed.

1. Locating Report Data

Step one involved locating the data you wish to include in your report. This function operates the same way as all other find commands in Splash.

4. Click the Find Data button to display the Sale Reports Find Screen



5. Enter the search criteria for the data you wish to include in your report (remember you can enter a date range ... symbols, or specify an entire month by entering only the month and year in the following format mm/yyyy)

6. Click the Find button to complete the find.

2. Choose Report Format

After completing the find you will be returned to the Sales Reports dialog where you now need to select the type of report you wish to generate.

7. Select the Report Type from the drop-down menu supplied at step 2.

8. Define whether you wish to show detail in your report. When clicked **Show Detail** will ensure each individual transaction is displayed along with totals rather than a summary totals for the found items.

3. Enter Report Title

9. Enter the Title you wish to appear on the top of the report.

10. Enter a report date to appear on the report (optional).

Point of Sale - Sales Reports

Step 1 : Locate Data for Reporting Find Data

Step 2: Choose Report Format
Report: Sales by Type
Show Detail ☐

Step 3: Enter Report Title
Report Title: Sales by Type
Report Date: Year to Date 2018

Step 4: Produce Report Print Cancel

11. Click the **Print** button.

12. The report will be displayed on your screen, click the Continue button or press ENTER to display the print dialog.

Splash POS

File Edit View Insert Format Records Scripts Tools Window Help

Pages: 1 Total

Layout: Sales by Type View As: [Icons] Exit Preview

Script paused Continue

13. The print dialog will be displayed on your screen. The appearance of the dialog will differ for each printer type. Ensure Records Being Browsed is selected in the dialog before choosing to print.

Print

Print: Records being browsed

Printer
Name: Brother HL-4570CDW series
Status: Ready
Type: Brother HL-4570CDW series
Where: BRN001BA99F8BD9
Comment: HL-4570CDW LAN

Print range
☒ All
☐ Pages from: 1 to: 1

Copies
Number of copies: 1
☐ Collate

Number pages from: 1

Print to file ☐

OK Cancel

14. Click the Print button to produce the report, or Cancel to return to the Sales Report screen without printing.

Sample Reports

Individual Sales by Payment Type

This report displays a list of all transactions for a specified date along with totals for each method of payment. When selecting this report type you will be asked to define the date for reporting.

Without Detail

Summary by Payment Type - Year to Date 2018										
	Account	Cash	Cheque	CreditCard	Eftpos	Internet	Mgment	Promo	Voucher	Other
POS 1	\$0.00	\$801.35	\$0.00	\$502.40	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
17/01/2018	\$0.00	\$0.00	\$0.00	\$302.40	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
25/01/2018	\$0.00	\$85.00	\$0.00	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2/02/2018	\$0.00	\$222.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8/02/2018	\$0.00	\$258.70	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9/02/2018	\$0.00	\$17.90	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
12/02/2018	\$0.00	\$217.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Totals	\$0.00	\$801.35	\$0.00	\$502.40	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

With Detail

Summary by Payment Type - Year to Date 2018										
	Account	Cash	Cheque	CreditCard	Eftpos	Internet	Mgment	Promo	Voucher	Other
POS 1	\$0.00	\$716.35	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2/02/2018	\$0.00	\$222.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14733 Mary McDougal	\$0.00	\$72.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14733 Andrew McArthur	\$0.00	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14733 Mark Fairbrother	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8/02/2018	\$0.00	\$258.70	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14735 Cash Sale	\$0.00	\$4.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14735 Cash Sale	\$0.00	\$19.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14735 Barbara Smith	\$0.00	\$151.45	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14735 Daniel Smith	\$0.00	\$83.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9/02/2018	\$0.00	\$17.90	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14735 Cash Sale	\$0.00	\$2.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14735 Cash Sale	\$0.00	\$2.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14736 Cash Sale	\$0.00	\$2.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14736 Cash Sale	\$0.00	\$4.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14736 Cash Sale	\$0.00	\$3.80	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14736 Cash Sale	\$0.00	\$3.60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
12/02/2018	\$0.00	\$217.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14737 Barbara Smith	\$0.00	\$217.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Totals	\$0.00	\$716.35	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Pg. Printed at 15U12 on Wednesday, 14 February 2018

Summary of Transactions

This report displays a list of all sale items grouped by date of payment.

Without Detail

Summary of Transactions				
		Payments Received	Items Paid For	Invoice Total
17 January 2018				
POS 1		\$302.40	\$302.40	\$302.40
Transaction Balanced		\$302.40	\$302.40	\$302.40
Cashsheet Total		\$302.40	\$302.40	\$302.40

With Detail

Summary of Transactions				
		Payments Received	Items Paid For	Invoice Total
08 February 2018				
POS 1		\$458.70	\$458.70	\$458.70
Transaction Balanced		\$458.70	\$458.70	\$458.70
8/2/2018 2:54 PM	147338	Cash Sale	\$0.00	\$0.00
8/2/2018 2:56 PM	147339	Cash Sale	\$0.00	\$0.00
8/2/2018 2:58 PM	147340	Cash Sale	\$0.00	\$0.00
8/2/2018 2:58 PM	147341	Cash Sale	\$0.00	\$0.00
8/2/2018 2:58 PM	147342	Cash Sale	\$0.00	\$0.00
8/2/2018 2:59 PM	147343	Cash Sale	\$0.00	\$0.00
8/2/2018 3:00 PM	147344	Cash Sale	\$0.00	\$0.00
8/2/2018 3:00 PM	147345	Cash Sale	\$0.00	\$0.00
8/2/2018 3:01 PM	147346	Cash Sale	\$0.00	\$0.00
8/2/2018 3:03 PM	147347	Cash Sale	\$0.00	\$0.00
8/2/2018 3:03 PM	147348	Cash Sale	\$0.00	\$0.00
8/2/2018 3:23 PM	147349	Cash Sale	\$0.00	\$0.00
8/2/2018 3:29 PM	147350	Cash Sale	\$4.50	\$4.50
8/2/2018 3:29 PM	147351	Cash Sale	\$0.00	\$0.00
8/2/2018 3:39 PM	147352	Cash Sale	\$19.75	\$19.75
8/2/2018 3:49 PM	147353	Barbara Smith	\$351.45	\$351.45
8/2/2018 3:49 PM	147354	Cash Sale	\$0.00	\$0.00
8/2/2018 3:57 PM	147355	Daniel Smith	\$83.00	\$83.00
9/2/2018 11:15 AM	147356	Cash Sale	\$0.00	\$0.00
Cashsheet Total		\$458.70	\$458.70	\$458.70

Individual Sales by Payment Type

This report displays a list of all transactions for a specified date along with totals for each method of payment. When selecting this report type you will be asked to define the date for reporting.

Without Detail

Individual Sales by Payment Type	
Wednesday, 14 February 2018	\$592.85
CASH	\$201.65
CREDITCARD	\$167.90
EFTPOS	\$223.30
TOTAL PAYMENTS REPORTED	\$592.85

With Detail

Individual Sales by Payment Type	
Wednesday, 14 February 2018	\$592.85
CASH	\$201.65
3:16 PM 147375 Anthony Thomson	\$159.95
3:16 PM 147376 Cash Sale	\$41.70
CREDITCARD	\$167.90
3:15 PM 147373 Robyn Schwass	\$167.90
EFTPOS	\$223.30
3:16 PM 147374 Malcolm Williams	\$168.30
3:17 PM 147378 Cash Sale	\$55.00
TOTAL PAYMENTS REPORTED	\$592.85

Totals by Day

This report displays the total sales grouped by date of payment.

Without Detail

Totals By Day			
	QTY	TOTAL INC	TOTAL GST
Pos 1		\$2,096.60	\$19.63
Wednesday, 17 January 2018		\$302.40	
Thursday, 25 January 2018		\$285.00	
Friday, 02 February 2018		\$222.00	
Thursday, 08 February 2018		\$458.70	\$4.83
Friday, 09 February 2018		\$17.90	\$1.63
Monday, 12 February 2018		\$217.75	\$0.18
Wednesday, 14 February 2018		\$592.85	\$12.99
Total Included in Report		\$2,096.60	\$19.63

With Detail

Totals By Day				
	QTY	TOTAL INC	TOTAL GST	TOTAL EX
Pos 1		\$2,096.60	\$19.63	\$2,076.97
Wednesday, 17 January 2018		\$302.40		\$302.40
Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block	1	\$92.25		\$92.25
Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block	1	\$1.35		\$1.35
Lucas Smith - Penguin - 4:30 PM Mon (Term Jul	1	\$90.00		\$90.00
Nicholas Smith - Turtles - 11:00 AM Thu (Term Jul	1	\$59.40		\$59.40
Nicholas Smith - Turtles - 11:00 AM Thu (Term Jun	1	\$59.40		\$59.40
Thursday, 25 January 2018		\$285.00		\$285.00
Jenny Williams - Turtles - 10:30 AM Thu (Block Feb	1	\$34.50		\$34.50
Jenny Williams - Turtles - 10:30 AM Thu (Block Jan	2	\$40.50		\$40.50
Lucas Smith - Penguin - 4:30 PM Mon (Block Feb	1	\$1.20		\$1.20
Lucas Smith - Penguin - 4:30 PM Mon (Block Jan	2	\$73.80		\$73.80
Nicholas Smith - Turtles - 11:00 AM Thu (Block Feb	1	\$5.45		\$5.45
Nicholas Smith - Turtles - 11:00 AM Thu (Block Jan	2	\$44.55		\$44.55
Robert Thomson - Starfish - 5:00 PM Tue (Block Feb	1	\$13.00		\$13.00
Robert Thomson - Starfish - 5:00 PM Tue (Block Jan	2	\$72.00		\$72.00
Friday, 02 February 2018		\$222.00		\$222.00
Hamish McDougal - Seals - 3:45 PM Mon (Block Feb	1	\$72.00		\$72.00
Jack McArthur - Seals - 3:45 PM Mon (Block Feb	1	\$50.00		\$50.00
Paul Fairbrother - Seals - 3:45 PM Mon (Block Feb	1	\$100.00		\$100.00
Thursday, 08 February 2018		\$458.70	\$4.83	\$453.87
Aquastream	1	\$12.95	\$1.18	\$11.77
Chips	1	\$1.90	\$0.17	\$1.73
Chupa Chups	2	\$1.20	\$0.10	\$1.10
Cometto	1	\$3.50	\$0.32	\$3.18
Freddo Frog	1	\$0.60	\$0.05	\$0.55
Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block	1	\$73.80		\$73.80
Lucas Smith - Penguin - 4:30 PM Mon (Term Aug	1	\$72.00		\$72.00

Printed on Wednesday, 14 February 2018

Page 1

Totals by Week

This report displays the total sales grouped by date of payment.

Without Detail

Totals By Week				
	QTY	TOTAL INC	TOTAL GST	TOTAL EX
Pos 1		\$2,098.80	\$19.83	\$2,078.97
Week 3		\$302.40		\$302.40
Week 4		\$285.00		\$285.00
Week 5		\$222.00		\$222.00
Week 6		\$478.80	\$8.46	\$470.14
Week 7		\$810.80	\$13.17	\$797.43
Total Included in Report		\$2,098.80	\$19.83	\$2,078.97

With Detail

Totals By Week				
	QTY	TOTAL INC	TOTAL GST	TOTAL EX
Pos 1		\$2,098.80	\$19.83	\$2,078.97
Week 3		\$302.40		\$302.40
Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block	1	\$92.25		\$92.25
Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block	1	\$1.35		\$1.35
Lucas Smith - Penguin - 4:30 PM Mon (Term Jul	1	\$90.00		\$90.00
Nicholas Smith - Turtles - 11:00 AM Thu (Term Jul	1	\$59.40		\$59.40
Nicholas Smith - Turtles - 11:00 AM Thu (Term Jun	1	\$59.40		\$59.40
Week 4		\$285.00		\$285.00
Jenny Williams - Turtles - 10:30 AM Thu (Block Feb	1	\$34.50		\$34.50
Jenny Williams - Turtles - 10:30 AM Thu (Block Jan	2	\$40.50		\$40.50
Lucas Smith - Penguin - 4:30 PM Mon (Block Feb	1	\$1.20		\$1.20
Lucas Smith - Penguin - 4:30 PM Mon (Block Jan	2	\$73.80		\$73.80
Nicholas Smith - Turtles - 11:00 AM Thu (Block Feb	1	\$5.45		\$5.45
Nicholas Smith - Turtles - 11:00 AM Thu (Block Jan	2	\$44.55		\$44.55
Robert Thomson - Starfish - 5:00 PM Tue (Block Feb	1	\$13.00		\$13.00
Robert Thomson - Starfish - 5:00 PM Tue (Block Jan	2	\$72.00		\$72.00
Week 5		\$222.00		\$222.00
Hamish McDougal - Seals - 3:45 PM Mon (Block Feb	1	\$72.00		\$72.00
Jack McArthur - Seals - 3:45 PM Mon (Block Feb	1	\$50.00		\$50.00
Paul Fairbrother - Seals - 3:45 PM Mon (Block Feb	1	\$100.00		\$100.00
Week 6		\$478.80	\$8.46	\$470.14
600ml water	2	\$4.00	\$0.36	\$3.64
Aquastream	1	\$12.95	\$1.18	\$11.77
Chips	1	\$1.90	\$0.17	\$1.73
Chupa Chups	2	\$1.20	\$0.10	\$1.10
Coffee	1	\$4.00	\$0.36	\$3.64
Cornetto	1	\$3.50	\$0.32	\$3.18
Fredddo Frog	1	\$0.60	\$0.05	\$0.55
Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block	1	\$73.80		\$73.80

Printed on Wednesday, 14 February 2018

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Totals by Month

This report displays the total sales grouped by date of payment.

Without Detail

Totals By Month				
	QTY	TOTAL INC	TOTAL GST	TOTAL EX
Pos 1		\$2,098.80	\$19.83	\$2,078.97
January		\$587.40		\$587.40
February		\$1,509.20	\$19.83	\$1,489.57
Total Included in Report		\$2,098.80	\$19.83	\$2,078.97

With Detail

Totals By Month				
	QTY	TOTAL INC	TOTAL GST	TOTAL EX
Pos 1		\$2,098.80	\$19.83	\$2,078.97
January		\$587.40		\$587.40
Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block	1	\$92.25		\$92.25
Jacob (Jake) Smith - Penguin - 3:30 PM Mon (Block	1	\$1.35		\$1.35
Jenny Williams - Turtles - 10:30 AM Thu (Block Feb	1	\$34.50		\$34.50
Jenny Williams - Turtles - 10:30 AM Thu (Block Jan	2	\$40.50		\$40.50
Lucas Smith - Penguin - 4:30 PM Mon (Block Feb	1	\$1.20		\$1.20
Lucas Smith - Penguin - 4:30 PM Mon (Block Jan	2	\$73.80		\$73.80
Lucas Smith - Penguin - 4:30 PM Mon (Term Jul	1	\$90.00		\$90.00
Nicholas Smith - Turtles - 11:00 AM Thu (Block Feb	1	\$5.45		\$5.45
Nicholas Smith - Turtles - 11:00 AM Thu (Block Jan	2	\$44.55		\$44.55
Nicholas Smith - Turtles - 11:00 AM Thu (Term Jul	1	\$59.40		\$59.40
Nicholas Smith - Turtles - 11:00 AM Thu (Term Jun	1	\$59.40		\$59.40
Robert Thomson - Starfish - 5:00 PM Tue (Block Feb	1	\$13.00		\$13.00
Robert Thomson - Starfish - 5:00 PM Tue (Block Jan	2	\$72.00		\$72.00
February		\$1,509.20	\$19.83	\$1,489.57
600ml water	3	\$6.00	\$0.54	\$5.46
Aquastream	2	\$25.90	\$2.36	\$23.54
Benjamin Williams - Turtles - 10:00 AM Thu (Term Jun	1	\$54.00		\$54.00
Caroline Thomson - Shrimps - 9:30 AM Thu (Term Jun	1	\$54.00		\$54.00
Chips	1	\$1.90	\$0.17	\$1.73
Chupa Chups	2	\$1.20	\$0.10	\$1.10
Coffee	2	\$8.00	\$0.72	\$7.28
Cornetto	1	\$3.50	\$0.32	\$3.18
Flex	1	\$19.95	\$1.81	\$18.14
Fredddo Frog	1	\$0.60	\$0.05	\$0.55
Fruit Box	1	\$1.90	\$0.17	\$1.73
Hamish McDougal - Seals - 3:45 PM Mon (Block Feb	1	\$72.00		\$72.00
Printed on Wednesday, 14 February 2018				
Page 1				

Totals by Year

This report displays the total sales grouped by date of payment.

Without Detail

Totals By Year				
	QTY	TOTAL INC	TOTAL GST	TOTAL EX
Pos 1		\$2,371.40	\$22.51	\$2,348.89
2017		\$274.80	\$2.88	\$271.92
2018		\$2,096.60	\$19.63	\$2,076.97
Total Included in Report		\$2,371.40	\$22.51	\$2,348.89

With Detail

Totals By Year				
	QTY	TOTAL INC	TOTAL GST	TOTAL EX
Pos 1		\$2,371.40	\$22.51	\$2,348.89
2017		\$274.80	\$2.88	\$271.92
600ml water	4	\$8.00	\$0.72	\$7.28
Jake Smith - Penguin - 3:30 PM Mon (Block Nov	4	\$8.30		\$8.30
Jake Smith - Penguin - 3:30 PM Mon (Term Jun 2017)	2	\$54.00		\$54.00
Jake Smith - Penguin - 4:00 PM Mon (Block Nov	1	\$3.30		\$3.30
Jessica Sinclair - Shrimps - 10:00 AM Thu (Term Jul	1	\$54.00		\$54.00
Jessica Sinclair - Shrimps - 10:00 AM Thu (Term Jun	1	\$54.00		\$54.00
Lucas Smith - Penguin - 4:30 PM Mon (Block Nov	1	\$3.30		\$3.30
Lucas Smith - Penguin - 4:30 PM Mon (Term Jul	1			
Lucas Smith - Penguin - 4:30 PM Mon (Term Jun	1	\$54.00		\$54.00
Nicholas Smith - Turtles - 11:00 AM Thu (Block Nov	1	\$3.30		\$3.30
Paula Schwass - Turtles - 3:30 PM Mon (Term Nov	1	\$3.30		\$3.30
Water	12	\$24.00	\$2.16	\$21.84
William Jessop - Turtles - 10:30 AM Thu (Term Nov	3	\$5.30		\$5.30
2018		\$2,096.60	\$19.63	\$2,076.97
600ml water	3	\$6.00	\$0.54	\$5.46
Aquastream	2	\$25.90	\$2.36	\$23.54
Benjamin Williams - Turtles - 10:00 AM Thu (Term Jun	1	\$54.00		\$54.00
Caroline Thomson - Shrimps - 9:30 AM Thu (Term Jun	1	\$54.00		\$54.00
Chips	1	\$1.90	\$0.17	\$1.73
Chupa Chups	2	\$1.20	\$0.10	\$1.10
Coffee	2	\$8.00	\$0.72	\$7.28
Cometto	1	\$3.50	\$0.32	\$3.18
Flex	1	\$19.95	\$1.81	\$18.14
Freddo Frog	1	\$0.60	\$0.05	\$0.55
Fruit Box	1	\$1.90	\$0.17	\$1.73
Hamish McDougal - Seals - 3:45 PM Mon (Block Feb	1	\$72.00		\$72.00
Printed on Wednesday, 14 February 2018				
Page 1				

Totals by Location

This report displays the total sales grouped by the location the payment was processed.

Sales By Location - Year To Date 2018					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
POS 1	79	\$1,778.55	\$1,769.03	\$9.52	99.77%
POS 2	4	\$4.00	\$4.00		0.23%
Total Sales	83	\$1,782.55	\$1,773.03	\$9.52	

With Detail

Sales By Location - Year To Date 2018					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
POS 1	79	\$1,778.55	\$1,769.03	\$9.52	99.77%
600ml water	7	\$14.00	\$12.74	\$1.26	
Aquastream	1	\$12.95	\$11.77	\$1.18	
Chips	1	\$1.90	\$1.73	\$0.17	
Chupa Chups	2	\$1.20	\$1.10	\$0.10	
Coffee	1	\$4.00	\$3.64	\$0.36	
Cornetto	1	\$3.50	\$3.18	\$0.32	
Fredddo Frog	1	\$0.60	\$0.55	\$0.05	
Hamish McDougal - Seals - 3:45 PM	1	\$72.00	\$72.00		
Jack McArthur - Seals - 3:45 PM Mon	1	\$50.00	\$50.00		
Jacob (Jake) Smith - Penguin - 3:30 PM	1	\$73.80	\$73.80		
Jacob (Jake) Smith - Penguin - 3:30 PM	1	\$92.25	\$92.25		
Jacob (Jake) Smith - Penguin - 3:30 PM	1	\$1.35	\$1.35		
Jacob (Jake) Smith - Penguin - 3:30 PM	1	\$73.80	\$73.80		
Jake Smith - Penguin - 3:30 PM Mon	4	\$8.30	\$8.30		
Jake Smith - Penguin - 3:30 PM Mon	2	\$54.00	\$54.00		
Jake Smith - Penguin - 4:00 PM Mon	1	\$3.30	\$3.30		
Jenny Williams - Turtles - 10:30 AM Thu	1	\$34.50	\$34.50		
Jenny Williams - Turtles - 10:30 AM Thu	2	\$40.50	\$40.50		
Jessica Sinclair - Shrimps - 10:00 AM	1	\$54.00	\$54.00		
Jessica Sinclair - Shrimps - 10:00 AM	1	\$54.00	\$54.00		
Lucas Smith - Penguin - 4:30 PM Mon	1	\$1.20	\$1.20		

Pg. 1 Printed at 4:30 PM on Monday, 12 February 2018

Sales by Group

This report displays a summary of sale items summarised by product group.

Sales By Group - Year To Date 2018					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Goggles	3	\$95.95	\$92.13	\$3.82	5.20%
Kiosk	31	\$63.20	\$57.50	\$5.70	3.24%
Not Defined	5	\$384.00	\$384.00		21.66%
Parent & Child	22	\$458.00	\$458.00		25.83%
Preschool	21	\$696.40	\$696.40		39.28%
School Age	1	\$85.00	\$85.00		4.79%
Total Sales	83	\$1,782.55	\$1,773.03	\$9.52	

With Detail

Sales By Group - Year To Date 2018					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Goggles	3	\$95.95	\$92.13	\$3.82	5.20%
Aquastream	1	\$12.95	\$11.77	\$1.18	
Phillip Smith - Penguin - 4:00 PM Mon	1	\$54.00	\$54.00		
Vorgee Missile Goggles	1	\$29.00	\$26.36	\$2.64	
Kiosk	31	\$63.20	\$57.50	\$5.70	3.24%
600ml water	7	\$14.00	\$12.74	\$1.26	
Chips	1	\$1.90	\$1.73	\$0.17	
Chupa Chups	2	\$1.20	\$1.10	\$0.10	
Coffee	1	\$4.00	\$3.64	\$0.36	
Cornetto	1	\$3.50	\$3.18	\$0.32	
Fredddo Frog	1	\$0.60	\$0.55	\$0.05	
Mars Bar	2	\$4.00	\$3.64	\$0.36	
Nippys 375ml Milk	1	\$2.50	\$2.27	\$0.23	
Powerade	1	\$3.80	\$3.45	\$0.35	
Pump Water	1	\$3.60	\$3.27	\$0.33	
Snakes Alive	1	\$0.10	\$0.09	\$0.01	
Water	12	\$24.00	\$21.84	\$2.16	
Not Defined	5	\$384.00	\$384.00		21.66%
Hamish McDougal - Seals - 3:45 PM	1	\$72.00	\$72.00		
Jack McArthur - Seals - 3:45 PM Mon	1	\$50.00	\$50.00		
Lucas Smith - Penguin - 4:30 PM Mon	1	\$90.00	\$90.00		
Lucas Smith - Penguin - 4:30 PM Mon	1	\$72.00	\$72.00		

Sales by Type

This report displays a summary of sale items grouped by product type.

Sales By Type - Year To Date 2018					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Goggles	2	\$41.95	\$38.13	\$3.82	2.15%
Hot Drinks	1	\$4.00	\$3.64	\$0.36	0.21%
Kiosk	30	\$59.20	\$53.86	\$5.34	3.04%
Lesson	50	\$1,677.40	\$1,677.40		94.61%
Total Sales	83	\$1,782.55	\$1,773.03	\$9.52	

With Detail

Sales By Type - Year To Date 2018					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Goggles	2	\$41.95	\$38.13	\$3.82	2.15%
Aquastream	1	\$12.95	\$11.77	\$1.18	
Vorgee Missile Goggles	1	\$29.00	\$26.36	\$2.64	
Hot Drinks	1	\$4.00	\$3.64	\$0.36	0.21%
Coffee	1	\$4.00	\$3.64	\$0.36	
Kiosk	30	\$59.20	\$53.86	\$5.34	3.04%
600ml water	7	\$14.00	\$12.74	\$1.26	
Chips	1	\$1.90	\$1.73	\$0.17	
Chupa Chups	2	\$1.20	\$1.10	\$0.10	
Cornetto	1	\$3.50	\$3.18	\$0.32	
Freddo Frog	1	\$0.60	\$0.55	\$0.05	
Mars Bar	2	\$4.00	\$3.64	\$0.36	
Nippys 375ml Milk	1	\$2.50	\$2.27	\$0.23	
Powerade	1	\$3.80	\$3.45	\$0.35	
Pump Water	1	\$3.60	\$3.27	\$0.33	
Snakes Alive	1	\$0.10	\$0.09	\$0.01	
Water	12	\$24.00	\$21.84	\$2.16	
Lesson	50	\$1,677.40	\$1,677.40		94.61%
Hamish McDougal - Seals - 3:45 PM	1	\$72.00	\$72.00		
Jack McArthur - Seals - 3:45 PM Mon	1	\$50.00	\$50.00		
Jacob (Jake) Smith - Penguin - 3:30 PM	1	\$73.80	\$73.80		

Sales by Category

This report displays a summary of sale items summarised by product category.

Sales By Category - Year To Date 2018					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Confectionary	6	\$5.90	\$5.38	\$0.52	0.30%
Drinks	23	\$51.90	\$47.21	\$4.69	2.66%
Frozen	1	\$3.50	\$3.18	\$0.32	0.18%
Googles	1	\$12.95	\$11.77	\$1.18	0.66%
Lesson	50	\$1,677.40	\$1,677.40		94.61%
SNACKS	1	\$1.90	\$1.73	\$0.17	0.10%
Vorgee	1	\$29.00	\$26.36	\$2.64	1.49%
Total Sales	83	\$1,782.55	\$1,773.03	\$9.52	

With Detail

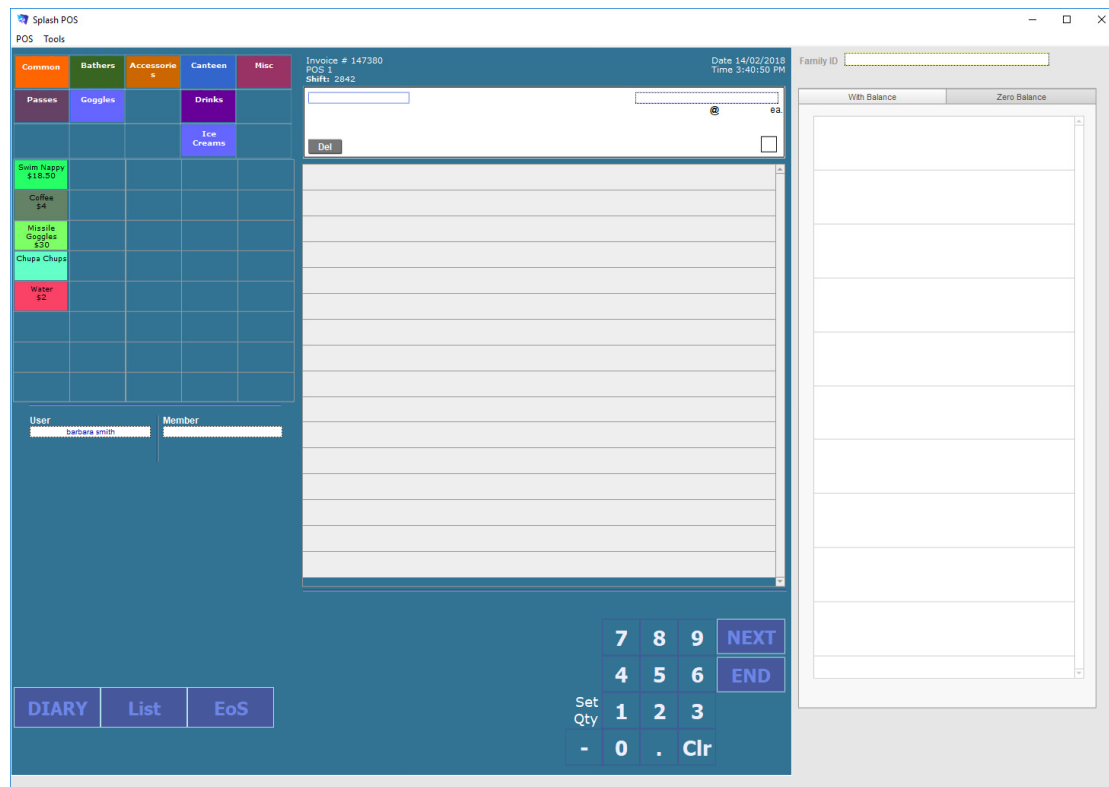
Sales By Category - Year To Date 2018					
	Number Sold	Total Sales Inc GST	Total Sales Ex GST	Total GST	% Total Sales
Confectionary	6	\$5.90	\$5.38	\$0.52	0.30%
Chupa Chups	2	\$1.20	\$1.10	\$0.10	
Freddo Frog	1	\$0.60	\$0.55	\$0.05	
Mars Bar	2	\$4.00	\$3.64	\$0.36	
Snakes Alive	1	\$0.10	\$0.09	\$0.01	
Drinks	23	\$51.90	\$47.21	\$4.69	2.66%
600ml water	7	\$14.00	\$12.74	\$1.26	
Coffee	1	\$4.00	\$3.64	\$0.36	
Nippys 375ml Milk	1	\$2.50	\$2.27	\$0.23	
Powerade	1	\$3.80	\$3.45	\$0.35	
Pump Water	1	\$3.60	\$3.27	\$0.33	
Water	12	\$24.00	\$21.84	\$2.16	
Frozen	1	\$3.50	\$3.18	\$0.32	0.18%
Cornetto	1	\$3.50	\$3.18	\$0.32	
Googles	1	\$12.95	\$11.77	\$1.18	0.66%
Aquastream	1	\$12.95	\$11.77	\$1.18	
Lesson	50	\$1,677.40	\$1,677.40		94.61%
Hamish McDougal - Seals - 3:45 PM	1	\$72.00	\$72.00		
Jack McArthur - Seals - 3:45 PM Mon	1	\$50.00	\$50.00		
Jacob (Jake) Smith - Penguin - 3:30 PM	1	\$73.80	\$73.80		
Jacob (Jake) Smith - Penguin - 3:30 PM	1	\$92.25	\$92.25		

End of Day Procedures

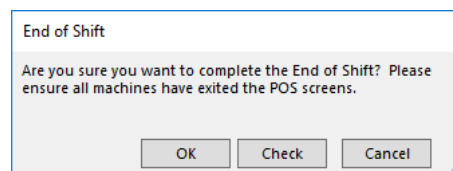
At the end of each business day you should reconcile the takings in your till drawer with transactions entered in the Splash POS system. End of day procedures begin in the sale entry screen.

Recording an End of Shift

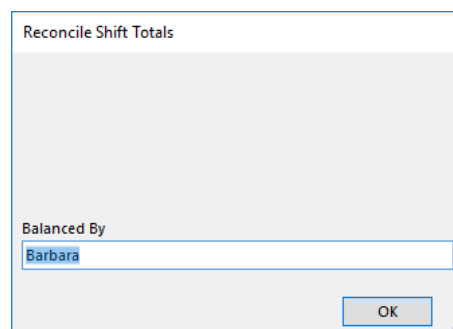
1. Click the POS \$ on the top right corner of the diary to ensure the POS Sale Entry screen is displayed.



2. Click once on the **EoS** (End of Shift) button displayed on the lower left of your screen.



3. You will be asked whether you want to end the shift or simply check the takings for the current shift.



4. You will be prompted to enter your name.

Reconcile Shift Totals

POS Tools

Reconcile Shift Totals

Overview	Actual Cash	Transactions																					
<p>ACTUAL Coins</p> <table border="1"> <tr><td>5's</td><td>2</td><td>\$0.10</td></tr> <tr><td>10's</td><td>15</td><td>\$1.50</td></tr> <tr><td>20's</td><td>27</td><td>\$5.40</td></tr> <tr><td>50's</td><td>8</td><td>\$4.00</td></tr> <tr><td>\$1's</td><td>12</td><td>\$12.00</td></tr> <tr><td>\$2's</td><td>10</td><td>\$20.00</td></tr> <tr><td colspan="2">Coin Value</td><td>\$43.00</td></tr> </table>			5's	2	\$0.10	10's	15	\$1.50	20's	27	\$5.40	50's	8	\$4.00	\$1's	12	\$12.00	\$2's	10	\$20.00	Coin Value		\$43.00
5's	2	\$0.10																					
10's	15	\$1.50																					
20's	27	\$5.40																					
50's	8	\$4.00																					
\$1's	12	\$12.00																					
\$2's	10	\$20.00																					
Coin Value		\$43.00																					
<p>ACTUAL Notes</p> <table border="1"> <tr><td>\$5's</td><td>22</td><td>\$110.00</td></tr> <tr><td>\$10's</td><td>30</td><td>\$300.00</td></tr> <tr><td>\$20's</td><td>24</td><td>\$480.00</td></tr> <tr><td>\$50's</td><td>4</td><td>\$200.00</td></tr> <tr><td>\$100's</td><td></td><td>\$0.00</td></tr> <tr><td colspan="2">Notes Value</td><td>\$1,090.00</td></tr> </table>			\$5's	22	\$110.00	\$10's	30	\$300.00	\$20's	24	\$480.00	\$50's	4	\$200.00	\$100's		\$0.00	Notes Value		\$1,090.00			
\$5's	22	\$110.00																					
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<p>System Totals</p> <table border="1"> <tr><td>Total Cash Counted</td><td>\$1,133.00</td></tr> <tr><td>EFTPOS Receipts</td><td>\$535.30</td></tr> <tr><td>Credit Card Receipts</td><td>\$680.90</td></tr> <tr><td>Cheques</td><td></td></tr> <tr><td>Amex Receipts</td><td></td></tr> <tr><td>Counted Total Cash / Receipts</td><td>\$2,349.20</td></tr> <tr><td>System Total Cash / Receipts</td><td>\$2,349.20</td></tr> <tr><td>Variance</td><td>\$0.00</td></tr> </table>			Total Cash Counted	\$1,133.00	EFTPOS Receipts	\$535.30	Credit Card Receipts	\$680.90	Cheques		Amex Receipts		Counted Total Cash / Receipts	\$2,349.20	System Total Cash / Receipts	\$2,349.20	Variance	\$0.00					
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Counted Total Cash / Receipts	\$2,349.20																						
System Total Cash / Receipts	\$2,349.20																						
Variance	\$0.00																						
<p>NOTES:</p> <p>Middy balance for staff change over.</p>																							
<p>Done</p>																							

- The Reconcile End of Shift dialog will be displayed on your screen. You will need to enter your takings in the fields provided on this dialog.
- Enter a breakdown of the cash you have counted from your till drawer. Enter the eftpos totals that have been printed from your eftpos machine.
- The figures you enter will be reconciled against the transactions you have processed. Any discrepancy between your takings and Splash will be displayed in the Variance field.

Reconcile Shift Totals

POS Tools

Reconcile Shift Totals

Overview	Actual Cash	Transactions																								
<p>Other Payments</p> <table border="1"> <tr><td>Accounts</td><td></td></tr> <tr><td>Direct Debit</td><td>\$22.20</td></tr> <tr><td>Internet</td><td></td></tr> <tr><td>Journal</td><td></td></tr> <tr><td>Promotion</td><td></td></tr> <tr><td>Redeemed Gift_Vouchers</td><td></td></tr> <tr><td>Management</td><td></td></tr> <tr><td>Other</td><td></td></tr> <tr><td>Session Pass</td><td></td></tr> <tr><td>Total Other Payments</td><td>\$22.20</td></tr> <tr><td>Theoretical Cash / EFTPOS</td><td>\$2,349.20</td></tr> <tr><td>Total Invoices / Sales</td><td>\$2,371.40</td></tr> </table>			Accounts		Direct Debit	\$22.20	Internet		Journal		Promotion		Redeemed Gift_Vouchers		Management		Other		Session Pass		Total Other Payments	\$22.20	Theoretical Cash / EFTPOS	\$2,349.20	Total Invoices / Sales	\$2,371.40
Accounts																										
Direct Debit	\$22.20																									
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<p>System Totals in POS / Actual Cash</p> <table border="1"> <tr><td>Cash</td><td>\$1,133.00</td><td>\$1,133.00</td></tr> <tr><td>EFTPOS</td><td>\$535.30</td><td>\$535.30</td></tr> <tr><td>Credit Cards</td><td>\$680.90</td><td>\$680.90</td></tr> <tr><td>Cheques</td><td></td><td></td></tr> <tr><td>Amex</td><td></td><td></td></tr> <tr><td>Total Cash / EFTPOS</td><td>\$2,349.20</td><td>\$2,349.20</td></tr> <tr><td>Variance</td><td>\$0.00</td><td></td></tr> </table>			Cash	\$1,133.00	\$1,133.00	EFTPOS	\$535.30	\$535.30	Credit Cards	\$680.90	\$680.90	Cheques			Amex			Total Cash / EFTPOS	\$2,349.20	\$2,349.20	Variance	\$0.00				
Cash	\$1,133.00	\$1,133.00																								
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Variance	\$0.00																									
<p>NOTES:</p> <p>Middy balance for staff change over.</p>																										
<p>Done</p>																										

- If there is a variance between the system figures and your counted receipts enter a reason within the Notes field. You cannot proceed without entering a Note when a variance occurs
- Click the Done button to save the information and return to the POS Sale Entry screen.
- The cashsheet will be printed when you click the Done button.

Cashsheet for 9/02/2018

Shift : 2842

Closed:

Balanced by: Barbara

	POS Totals	Actual Cash on Hand	
Cash	\$1133.00	\$1133.00	
EFTPOS	\$535.30	\$535.30	
CreditCards	\$680.90	\$680.90	
Cheques			
SubTotalB	<u>\$2349.20</u>	<u>\$2349.20</u>	
Additional Payments		Till Variance	\$0.00
		Midday balance for staff change over.	
Accounts			
Internet			
Journal			
Promotion			
Redeemed Gift Vouchers			
Management			
Other			
SubTotalA	<u>\$22.20</u>		
Total Invoices / Sales			
	<u>\$2371.40</u>		

ACTUAL Coins		ACTUAL Notes	
5's	<input type="text" value="2"/> \$0.10	\$5's	<input type="text" value="22"/> \$110.00
10's	<input type="text" value="15"/> \$1.50	\$10's	<input type="text" value="30"/> \$300.00
20's	<input type="text" value="27"/> \$5.40	\$20's	<input type="text" value="24"/> \$480.00
50's	<input type="text" value="8"/> \$4.00	\$50's	<input type="text" value="4"/> \$200.00
\$1's	<input type="text" value="12"/> \$12.00	\$100's	<input type="text"/> \$0.00
\$2's	<input type="text" value="10"/> \$20.00		
	\$43.00		\$1,090.00
		Total Cash Counted	\$1,133.00
		Total Cheques	
		Total	\$1,133.00

Understanding Cashesheets

Each cashsheet contains a breakdown of transactions and takings for a specified shift. A shift can be any duration – you may have a single shift each day or multiple shifts within each day.

Each cashsheet compares the actual transactions with your counted takings for the day.

The screenshot shows the 'Point of Sale - Cashesheet' window for 14 February 2018. The 'Overview' tab is active, displaying a comparison between system totals and actual cash. The 'Other Payments' section lists various payment methods with their respective amounts. The 'System Totals in POS / Actual Cash' table compares system totals with actual cash for different payment methods. The 'Total Cash / EFTPOS' is \$2,349.20, and the 'Total Invoices / Sales' is \$2,371.40. The variance is \$0.00.

Other Payments	
Accounts	
Direct Debit	\$22.20
Internet	
Journal	
Promotion	
Redeemed Gift Vouchers	
Management	
Other	
Session Pass	
Total Other Payments	\$22.20
Theoretical Cash / EFTPOS	\$2,349.20
Total Invoices / Sales	\$2,371.40

System Totals in POS / Actual Cash	
Cash	\$1,133.00 / \$1,133.00
EFTPOS	\$535.30 / \$535.30
Credit Cards	\$680.90 / \$680.90
Cheques	
Amex	
Total Cash / EFTPOS	\$2,349.20 / \$2,349.20

NOTES: Midday balance for staff change over.

The cashsheet overview displays the totals of all money received by payment method. It also displays the total transactions keyed and a comparison between what was processed and your physical cash on hand.

The screenshot shows the 'Actual Cash' tab in the 'Point of Sale - Cashesheet' window for 14 February 2018. This tab displays a record of the actual cash counted at the end of the shift, categorized by coin and note values. The 'Coin Value' is \$43.00, and the 'Notes Value' is \$1,090.00. The 'Total Cash Counted' is \$1,133.00.

ACTUAL Coins	
5%	2 \$0.10
10%	15 \$1.50
20%	27 \$5.40
50%	8 \$4.00
\$1's	12 \$12.00
\$2's	10 \$20.00
Coin Value	\$43.00

ACTUAL Notes	
\$5's	22 \$110.00
\$10's	30 \$300.00
\$20's	24 \$480.00
\$50's	4 \$200.00
\$100's	\$0.00
Notes Value	\$1,090.00

Total Cash Counted \$1,133.00

The second tab card in the cashsheet displays a record of the actual cash which was counted at the end of the shift. These numbers can be viewed but not changed after the End of Shift is processed.

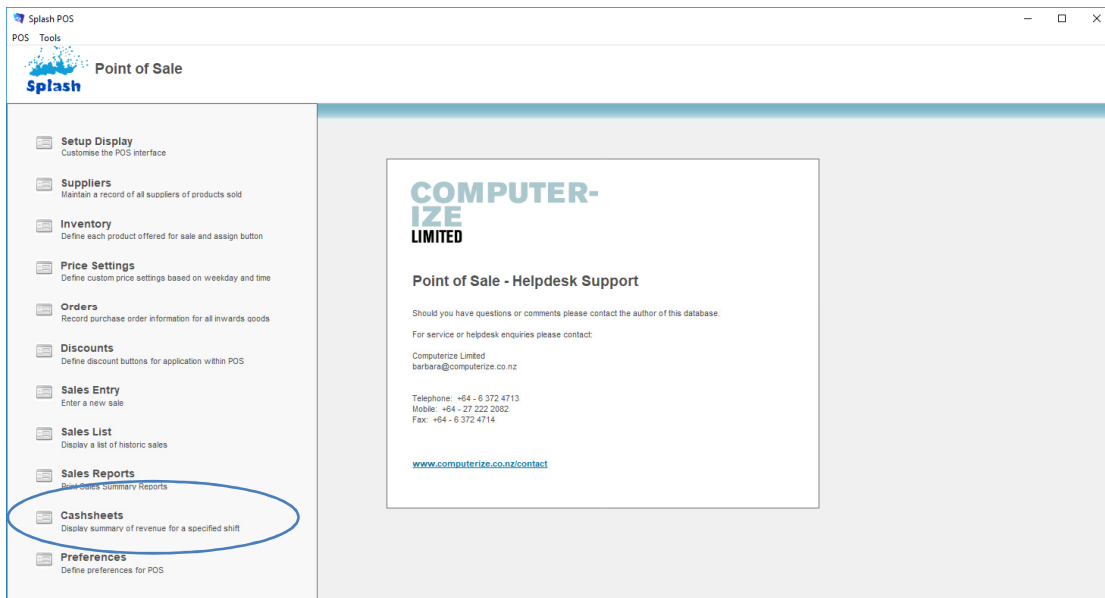
Date	Time	Sale ID	Family ID	Family	Invoice Total	Payment Type
8/02/18	3:17 PM	147349			\$0.00	Cash Sale
8/02/18	3:29 PM	147350			\$4.50	Cash Sale
8/02/18	3:29 PM	147351				Cash Sale
8/02/18	3:32 PM	147352			\$19.75	Cash Sale
8/02/18	3:39 PM	147353	2	SMITH (Barbara Smith)	\$351.45	Barbara Smith
8/02/18	3:49 PM	147354				Cash Sale
8/02/18	3:49 PM	147355	9	SMITH (Daniel Smith)	\$83.00	Daniel Smith
8/02/18	3:57 PM	147356				Cash Sale
9/02/18	11:13 AM	147357			\$2.50	Cash Sale
9/02/18	11:14 AM	147358			\$2.00	Cash Sale
9/02/18	11:14 AM	147359			\$0.00	Cash Sale
9/02/18	11:15 AM	147360			\$2.00	Cash Sale
9/02/18	11:15 AM	147361			\$0.00	Cash Sale
9/02/18	11:15 AM	147362				Cash Sale
9/02/18	11:18 AM	147363			\$4.00	Cash Sale
9/02/18	11:18 AM	147364			\$3.80	Cash Sale
9/02/18	11:19 AM	147365			\$3.60	Cash Sale
9/02/18	11:19 AM	147366			\$0.00	Cash Sale
9/02/18	1:13 PM	147367			\$0.00	Cash Sale
9/02/18	1:14 PM	147368			\$0.00	Cash Sale
12/02/18	1:23 PM	147369				Cash Sale
12/02/18	1:24 PM	147370				Cash Sale
12/02/18	1:30 PM	147371	2	SMITH (Barbara Smith)	\$217.75	Barbara Smith
12/02/18	1:38 PM	147372				Cash Sale
14/02/18	3:15 PM	147373	72	SCHWASS (Robyn Schwass)	\$167.90	Robyn Schwass
14/02/18	3:15 PM	147374	21	WILLIAMS (Malcolm Williams)	\$168.30	Malcolm Williams
14/02/18	3:16 PM	147375	15	THOMSON (Anthony Thomson)	\$159.95	Anthony
14/02/18	3:16 PM	147376			\$41.70	Cash Sale
14/02/18	3:16 PM	147377			\$0.00	Cash Sale
14/02/18	3:16 PM	147378			\$55.00	Cash Sale
14/02/18	3:17 PM	147379				Cash Sale

The final tabcard in the cashsheet displays a list of all transactions entered during the shift.

Displaying a List of Cashesheets

Each record in your Cashesheet module can be displayed in either a form view or as part of a list. List view displays all records in the found set.

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Cashesheet** on the left of your screen.



3. The Point of Sale – Cashesheet Screen will be displayed.
4. Click once on the **List View** button displayed in the blue stripe at the top of your screen.



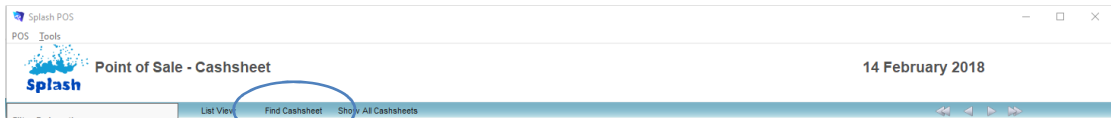
5. All records in the found set will be displayed in the list.

Sort By	Date	Shift	Location	Detail View	Find Cashsheet	Show All Cashsheets	Shift Total	Other Prots	Cash	Etpos	Credit Card	Amex	Cheque	POS Cash/Etpos	Actual Cash/Etpos	Variance
	27/04/14	2841	POS 1				\$6550.62	\$333.00	\$4183.07	\$1549.10	\$485.45			\$6217.62	\$6216.85	-\$0.77
	09/02/18	2842	POS 1				\$2371.40	\$22.20	\$1133.00	\$535.30	\$680.90			\$2349.20	\$2349.20	\$0.00
	14/02/18	2843	POS 1											\$0.00	\$0.00	\$0.00

NB: Display the detail of a selected cashsheet by clicking the goggles displayed to the left of the date.

Finding a Cashsheet

1. Ensure the POS Administration screen is displayed (see Administering Point of Sale).
2. Click once on the icon beside the word **Cashsheet** on the left of your screen.
3. Click once on the **Find Cashsheet** button displayed in the blue stripe at the top of your screen.



4. A blank Cashsheet will be displayed on your screen.
5. Enter the criteria for your find in the appropriate field/s.
6. Press ENTER or click the **Continue** button to complete the find.

Viewing Cashsheet Details

1. Use the **Finding a Cashsheet** function to locate the record you wish to view.
2. The Cashsheet entry form should be displayed on your screen.
3. Update any details as required.

Displaying a list of Daily Transactions

In addition to displaying system totals, the cashsheet record also contains a list of all transactions processed on the selected date.

1. Use the **Finding a Cashsheet** function to locate the record you wish to view.
2. The Cashsheet entry form should be displayed on your screen.
3. Click once on the Transactions tab card located on the right of your screen.



Splash POS
POS Tools

Point of Sale - Cashsheet

14 February 2018

List View Find Cashsheet Show All Cashsheets

Filter By Location:
All

Wed, 14 Feb 2018
Fri, 09 Feb 2018
Sun, 27 Apr 2014

Shift 2842 Date 9/2/18 Location POS 1

Last Balanced at 14/2/18 3:48:01 PM
Balanced By Barbara

Overview				Actual Cash		Transactions	
Date	Time	Sale ID	Family ID	Family	Invoice Total	Payment Type	
8/02/18	3:17 PM	147349					\$0.00 Cash Sale
8/02/18	3:29 PM	147350					\$4.50 Cash Sale
8/02/18	3:29 PM	147351					Cash Sale
8/02/18	3:32 PM	147352					\$19.75 Cash Sale
8/02/18	3:39 PM	147353	2	SMITH (Barbara Smith)			\$351.45 Barbara Smith
8/02/18	3:49 PM	147354					Cash Sale
8/02/18	3:49 PM	147355	9	SMITH (Daniel Smith)			\$83.00 Daniel Smith
8/02/18	3:57 PM	147356					Cash Sale
9/02/18	11:13 AM	147357					\$2.50 Cash Sale
9/02/18	11:14 AM	147358					\$2.00 Cash Sale
9/02/18	11:14 AM	147359					\$0.00 Cash Sale
9/02/18	11:15 AM	147360					\$2.00 Cash Sale
9/02/18	11:15 AM	147361					\$0.00 Cash Sale
9/02/18	11:15 AM	147362					Cash Sale
9/02/18	11:18 AM	147363					\$4.00 Cash Sale
9/02/18	11:18 AM	147364					\$3.80 Cash Sale
9/02/18	11:19 AM	147365					\$3.60 Cash Sale
9/02/18	11:19 AM	147366					\$0.00 Cash Sale
9/02/18	1:13 PM	147367					\$0.00 Cash Sale
9/02/18	1:14 PM	147368					\$0.00 Cash Sale
12/02/18	1:23 PM	147369					Cash Sale
12/02/18	1:24 PM	147370					Cash Sale
12/02/18	1:30 PM	147371	2	SMITH (Barbara Smith)			\$217.75 Barbara Smith
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14/02/18	3:16 PM	147376					\$41.70 Cash Sale
14/02/18	3:16 PM	147377					\$0.00 Cash Sale
14/02/18	3:16 PM	147378					\$55.00 Cash Sale
14/02/18	3:17 PM	147379					Cash Sale

4. This screen displays a single line for each transaction, it does not display the method of payment or the content of each transaction.

Deleting a Cashsheet Record

Cashsheet records cannot be deleted.

Printing a Cashesheet

Although the cashsheet is always printed at the time the End of Shift is performed there are times when you may need to reprint a historic report. This report displays the system total and actual receipts for a selected date.

1. Use the **Finding a Cashesheet** function to locate the cashsheet you wish to print.
2. Click the **Print** button displayed in the centre of your screen.

The screenshot shows the 'Point of Sale - Cashesheet' window for the date 14 February 2018. The interface includes a sidebar with a date filter, a main area with tabs for 'Overview', 'Actual Cash', and 'Transactions', and a bottom section for 'System Totals in POS / Actual Cash'.

System Totals in POS / Actual Cash

	POS	Actual Cash
Cash	\$1,133.00	\$1,133.00
EFTPOS	\$535.30	\$535.30
Credit Cards	\$680.90	\$680.90
Cheques		
Amex		
Total Cash / EFTPOS	\$2,349.20	\$2,349.20

Other Payments

Accounts	
Direct Debit	\$22.20
Internet	
Journal	
Promotion	
Redeemed Gift Vouchers	
Management	
Other	
Session Pass	
Total Other Payments	\$22.20
Theoretical Cash / EFTPOS	\$2,349.20
Total Invoices / Sales	\$2,371.40

Get Figures
Print

NOTES:
Midday balance for staff change over.

Variance: \$0.00

3. The cashsheet report will be sent directly to the printer..

Cashsheet for 9/02/2018

Shift : 2842

Closed:

Balanced by: Barbara

	POS Totals	Actual Cash on Hand
Cash	\$1133.00	\$1133.00
EFTPOS	\$535.30	\$535.30
CreditCards	\$680.90	\$680.90
Cheques		
SubTotalB	<u>\$2349.20</u>	<u>\$2349.20</u>

Additional Payments

Till Variance \$0.00

Midday balance for staff change over.

Accounts	
Internet	
Journal	
Promotion	
Redeemed Gift Vouchers	
Management	
Other	
SubTotalA	<u>\$22.20</u>
Total Invoices / Sales	<u>\$2371.40</u>

ACTUAL Coins			ACTUAL Notes		
5's	<input type="text" value="2"/>	\$0.10	\$5's	<input type="text" value="22"/>	\$110.00
10's	<input type="text" value="15"/>	\$1.50	\$10's	<input type="text" value="30"/>	\$300.00
20's	<input type="text" value="27"/>	\$5.40	\$20's	<input type="text" value="24"/>	\$480.00
50's	<input type="text" value="8"/>	\$4.00	\$50's	<input type="text" value="4"/>	\$200.00
\$1's	<input type="text" value="12"/>	\$12.00	\$100's	<input type="text"/>	\$0.00
\$2's	<input type="text" value="10"/>	\$20.00			
		\$43.00			\$1,090.00
			Total Cash Counted		\$1,133.00
			Total Cheques		
			Total		\$1,133.00

RGB Colour Palette

255, 255, 255	255,255,204	255,255,153	255,255,102	255,255,51	255,255,0
255,204,255	255,204,204	255,204,153	255,204,102	255,204,51	255,204,0
255,153,255	255,153,204	255,153,153	255,153,102	255,153,51	255,153,0
255,102,255	255,102,204	255,102,153	255,102,102	255,102,51	255,102,0
255,51,255	255,51,204	255,51,153	255,51,102	255,51,51	255,51,0
255,0,255	255,0,204	255,0,153	255,0,102	255,0,51	255,0,0
204,255,255	204,255,204	204,255,153	204,255,102	204,255,51	204,255,0
204,204,255	204,204,204	204,204,153	204,204,102	204,204,51	204,204,0
204,153,255	204,153,204	204,153,153	204,153,102	204,153,51	204,153,0
204,102,255	204,102,204	204,102,153	204,102,102	204,102,51	204,102,0
204,51,255	204,51,204	204,51,153	204,51,102	204,51,51	204,51,0
204,0,255	204,0,204	204,0,153	204,0,102	204,0,51	204,0,0
153,255,255	153,255,204	153,255,153	153,255,102	153,255,51	153,255,0
153,204,255	153,204,204	153,204,153	153,204,102	153,204,51	153,204,0
153,153,255	153,153,204	153,153,153	153,153,102	153,153,51	153,153,0
153,102,255	153,102,204	153,102,153	153,102,102	153,102,51	153,102,0
153,51,255	153,51,204	153,51,153	153,51,102	153,51,51	153,51,0
153,0,255	153,0,204	153,0,153	153,0,102	153,0,51	153,0,0

102,255,255	102,255,204	102,255,153	102,255,102	102,255,51	102,255,0
102,204,255	102,204,204	102,204,153	102,204,102	102,204,51	102,204,0
102,153,255	102,153,204	102,153,153	102,153,102	102,153,51	102,153,0
102,102,255	102,102,204	102,102,153	102,102,102	102,102,51	102,102,0
102,51,255	102,51,204	102,51,153	102,51,102	102,51,51	102,51,0
102,0,255	102,0,204	102,0,153	102,0,102	102,0,51	102,0,0
51,255,255	51,255,204	51,255,153	51,255,102	51,255,51	51,255,0
51,204,255	51,204,204	51,204,153	51,204,102	51,204,51	51,204,0
51,153,255	51,153,204	51,153,153	51,153,102	51,153,51	51,153,0
51,102,255	51,102,204	51,102,153	51,102,102	51,102,51	51,102,0
51,51,255	51,51,204	51,51,153	51,51,102	51,51,51	51,51,0
51,0,255	51,0,204	51,0,153	51,0,102	51,0,51	51,0,0
0,255,255	0,255,204	0,255,153	0,255,102	0,255,51	0,255,0
0,204,255	0,204,204	0,204,153	0,204,102	0,204,51	0,204,0
0,153,255	0,153,204	0,153,153	0,153,102	0,153,51	0,153,0
0,102,255	0,102,204	0,102,153	0,102,102	0,102,51	0,102,0
0,51,255	0,51,204	0,51,153	0,51,102	0,51,51	0,51,0