

# Splash V7

User Documentation - Families

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## 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

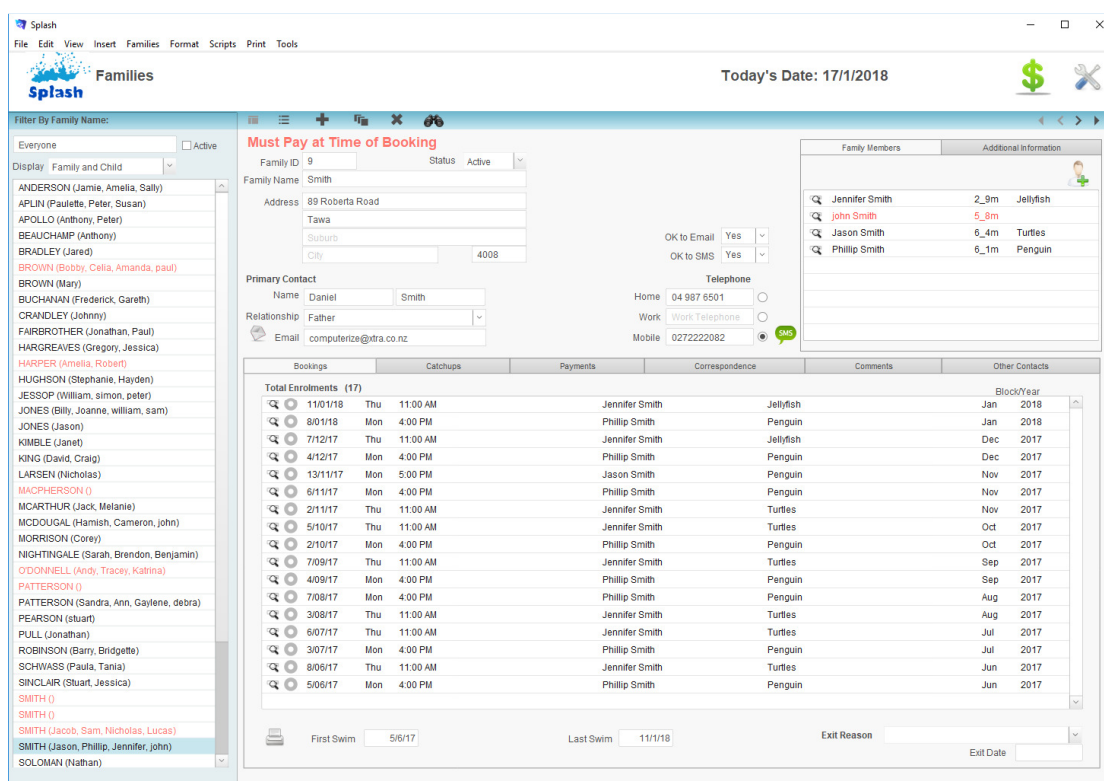
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families** icon



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, Relationship: Father, Email: computerize@xtra.co.nz

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

Family Members:

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

Bookings:

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

The screenshot shows the 'Bookings' tab for Family ID 9, 'Smith'. The interface includes a sidebar with a list of families, a central panel with family details and a list of bookings, and a right panel with family members and additional information.

**Family Details:**

- Family ID: 9
- Family Name: Smith
- Address: 89 Roberta Road
- Suburb: Tawa
- City: 4008
- Primary Contact: Daniel Smith (Father)
- Email: computerize@tra.co.nz
- Telephone: Home 04 987 5501, Work, Mobile 027222082

**Bookings List:**

Booking ID	Date	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	

**Family Members:**

- Jennifer Smith (2\_9m) Jellyfish
- John Smith (5\_8m)
- Jason Smith (6\_4m) Turtles
- Phillip Smith (6\_1m) Penguin

**Family Catchups** –The catchups/makeups tab card within the family file displays a list of all catchup lessons booked by the family.

The screenshot shows the 'Catchups' tab for Family ID 2, 'Smith'. The interface includes a sidebar with a list of families, a central panel with family details and a list of catchups, and a right panel with family members and additional information.

**Family Details:**

- Family ID: 2
- Family Name: Smith
- Address: 6A Erlestoke Crescent
- Suburb: Churton Park
- City: Wellington 4001
- Primary Contact: Barbara Smith (Mother)
- Email: barbara@computerize.co.nz
- Telephone: Home 063724713, Work, Mobile 027222082

**Catchups List:**

Catchup ID	Date	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 Members:**

- Jacob (Jake) Smith (5\_5m) Penguin
- Lucas Smith (5\_7m) Penguin
- Sam Smith (6\_3m)
- Nicholas Smith (6\_3m) Turtles

**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.

The screenshot shows the 'Payments' tab selected in the 'Family Payments' section. The interface includes a sidebar with a family list, a top navigation bar with 'File', 'Edit', 'View', 'Insert', 'Families', 'Format', 'Scripts', and 'Print Tools'. The main area displays family details for the Smith family (Family ID 2, Status Active) and a list of payments. The payments table has columns for Date, Inv ID, Description, and Amount.

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

**Family Correspondence** – The Correspondence tab card within the family file displays a list of all correspondence created for the selected family. To create a new item, simply click the Create Correspondence button.

The screenshot shows the 'Correspondence' tab selected in the 'Family Payments' section. The interface is similar to the previous one, but the main area displays a list of correspondence items. The correspondence table has columns for Date, Type, To, and Message.

Date	Type	To	Message
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

**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.

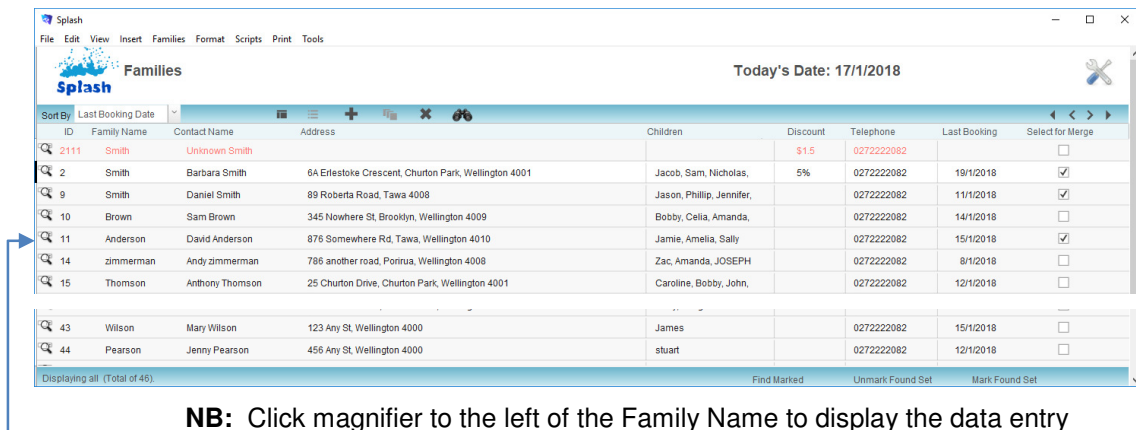
The screenshot shows the 'Comments' tab for Family ID 2 (Smith). The interface includes a menu bar (File, Edit, View, Insert, Families, Format, Scripts, Print, Tools), a toolbar, and a sidebar with a filter by family name. The main area displays family details, contact information, and a large text area for comments. The 'Additional Information' section on the right contains fields for Mums Occupation, Dads 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), a toolbar, and a sidebar with a filter by family name. The main area displays family details, contact information, and a large text area for comments. The 'Additional Information' section on the right contains fields for Mums Occupation, Dads Occupation, Custom Text 3, Custom Text 4, Custom Text 5, Custom Date 1, and Custom Date 2.

## Listing Family Records

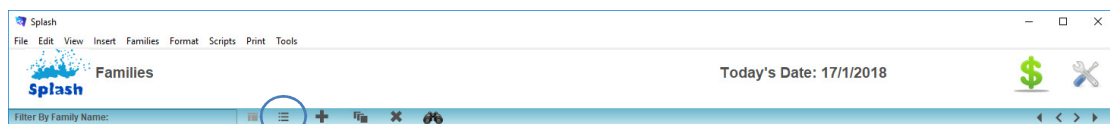
Each record in your database can be displayed in either form view or list view. List view will display all records in the found set – see the bottom left corner of the screen for the size of the current found set.



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

### Displaying a List of Families (from Family Details)

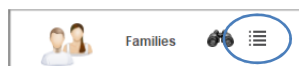
1. Click once the **List View** button displayed in the blue stripe at the top of your screen.



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

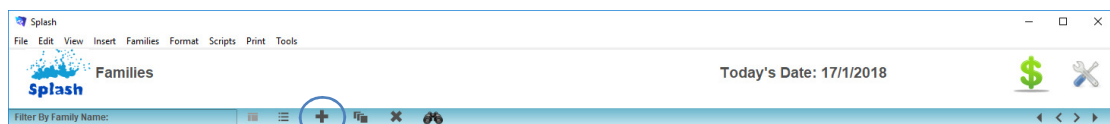
## Creating a New Family

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.

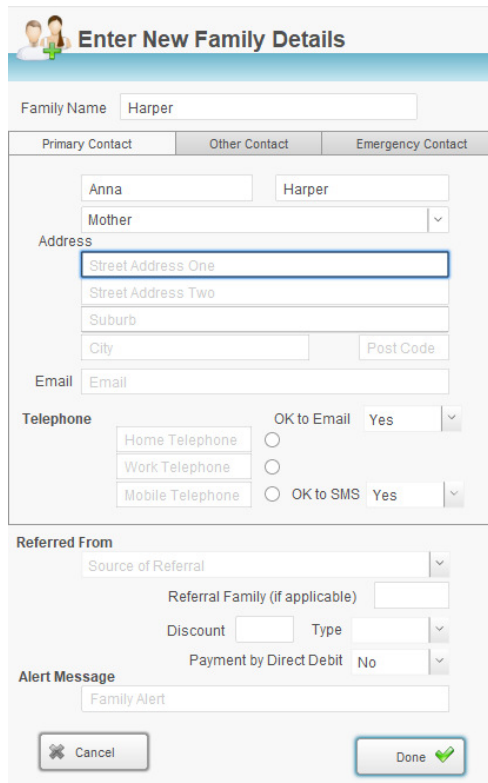
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families** icon



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:  ☐ OK to Email:   
 ☐  
 ☐ OK to SMS:

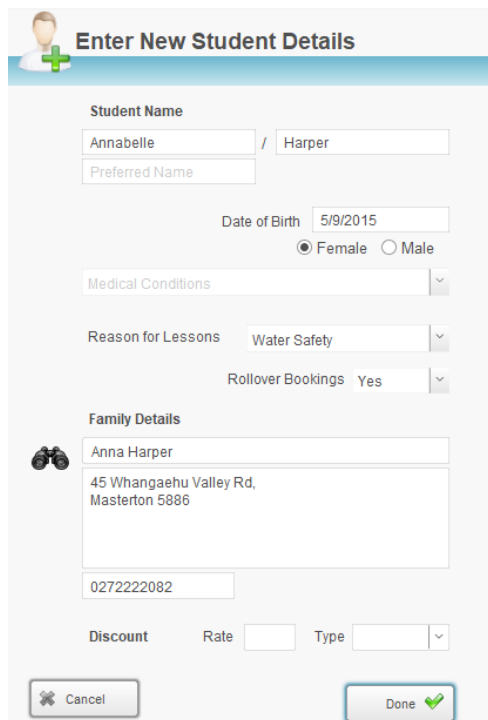
Referred From:   
Referral Family (if applicable):   
Discount:  Type:   
Payment by Direct Debit:

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.

**Search for a Family**

Cancel Find Now

Family ID Family Name Family Alert Message Status

Address Email OK to Email OK to SMS

**Contact Details**

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

Other Contact Name

Emergency Contact Name

**Payment Details** **Referral & Exit** **Custom Fields**

Discount Rate Discount Type Payment Authority Held Payment Type Credit Card Expiry Date Payment Details Missing

First Swim Date Last Swim Date Total Family Bookings Outstanding Balance

Cancel New Request Omit Records Constrain Set Extend Set Find Now

4. Enter the criteria for your find by typing your request in the corresponding field/s.
5. Click the **Find Now** button.
6. 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**.



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

Filter By Family Name: Everyone ☐ Active

Display: Family and Child

Family ID: 39123 Status: Active

Family Name: Harper

Address: 45 Whangaehu Valley Rd

Suburb: Masterton 5886

Primary Contact: Name: Anna Harper Relationship: Mother Email: barbara@computerize.co.nz

OK to Email: Yes OK to SMS: Yes

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

Family Members: Annabelle Harper 2\_4m

Additional Information:

- Family Relocating
- Financial
- Goals Met
- Other
- Other Commitments
- Personal Reasons
- Service
- Time Constraints

Exit Reason: Exit Date:

**NB:** Exit information may also be entered in the Additional Information tab card in the centre of the family record screen

Family Members Additional Information

Discount Rate: Type:

Referred From: Signage

Referral Family (if applicable):

Exit Reason: Exit Date:

Alert Message:

## 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 Ernestoke 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 [SMS]

Family Members: 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: Everyone ☐ Active

Display: Family and Child

Family ID: 2 Status: Active

Family Name: Smith

Address: 6A Efstokke 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 Members	Additional Information
Jacob (Jake) Smith	5_5m Penguin
Lucas Smith	5_7m Penguin
Sam Smith	6_3m
Nicholas Smith	6_3m Turtles

Bookings: Total Enrolments (27)

Bookings	Catchups	Payments	Correspondence	Comments	Other Contacts
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 11

Shift: 2842

Date: 17/01/2018

Time: 11:35:35 AM

Family ID: 2

SMITH (Barbara Smith)

With Balance: Zero Balance

With Balance	Zero Balance
Jacob (Jake) Smith	\$1.35
Penguin - 3:30 PM Mon (Block Jun 2017)	
Nicholas Smith	\$59.40
Turtles - 11:00 AM Thu (Term Jun 2017)	
Jacob (Jake) Smith	\$92.25
Penguin - 3:30 PM Mon (Block Jul 2017)	
Lucas Smith	\$90.00
Penguin - 4:30 PM Mon (Term Jul 2017)	
Nicholas Smith	\$59.40
Turtles - 11:00 AM Thu (Term Jul 2017)	
Jacob (Jake) Smith	\$73.80
Penguin - 3:30 PM Mon (Block Aug 2017)	
Lucas Smith	\$72.00
Penguin - 4:30 PM Mon (Term Aug 2017)	
Nicholas Smith	\$74.25
Turtles - 11:00 AM Thu (Term Aug 2017)	
Jacob (Jake) Smith	\$73.80
Penguin - 3:30 PM Mon (Block Sep 2017)	
Lucas Smith	\$72.00
Penguin - 4:30 PM Mon (Term Sep 2017)	
Nicholas Smith	\$59.40
Turtles - 11:00 AM Thu (Term Sep 2017)	

User: Barbara Smith Member: 2 Barbara Smith

DIARY List EoS

7 8 9 NEXT

4 5 6 END

Set Qty 1 2 3

- 0 . Clr

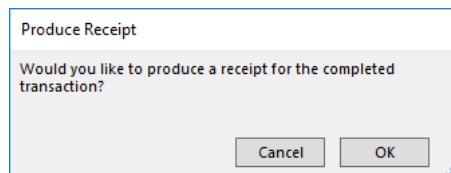
- Select the booking/s you would like to pay for by clicking once on each booking on the right of the screen.

The screenshot shows the Splash POS interface. On the left is a grid of items categorized by Common, Bathing, Accessories, Canteen, and Misc. The center displays a list of transactions with details like item name, quantity, and price. The right side shows a payment summary with a total of \$302.40. At the bottom right, there are buttons for 'END' and 'NEXT', which are circled in blue.

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.

The screenshot shows the End Sale screen in the Splash POS interface. It features a grid of payment methods including CASH, EFTPOS, CREDIT CARD, GIFT VOUCHER, CHEQUE, AMEX, INTERNET, MANAGEMENT, PROMO, DIRECT DEBIT, SESSION PASS, and JOURNAL. A numeric keypad is visible at the bottom right. A blue arrow points from the 'END' button in the previous screenshot to the 'END' button in this screenshot.

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

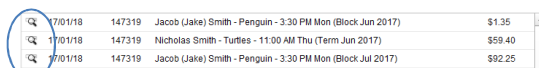
1. Use the **Finding a Family** function to locate the family record you wish to update.
2. Click once on the **Accounts** tab card displayed on the right of the screen.

The screenshot shows the "Splash Families" software interface. The "Accounts" tab is selected on the right. The main window displays a list of payments for the family "Smith". The left sidebar shows a list of families, with "SMITH (Jacob, Sam, Nicholas, Lucas)" selected. The top right shows "Today's Date: 17/1/2018".

Date	Inv ID	Family Name	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.



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
<b>Total Inc GST</b>			<b>\$302.40</b>
<b>Payment Method</b>			<b>GST Amt</b>
CreditCard			\$0.00
			\$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 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: 0272222082

Family Members:

Family Member	Age	Swim Style
Jacob (Jake) Smith	5_5m	Penguin
Lucas Smith	5_7m	Penguin
Sam Smith	6_3m	
Nicholas Smith	6_3m	Turtles

Bookings Catchups Payments Correspondence Comments Other Contacts

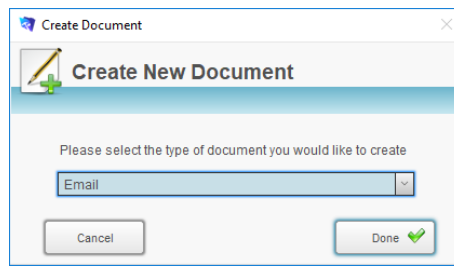
Create Correspondence

Date	Type	Family Member	Subject
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

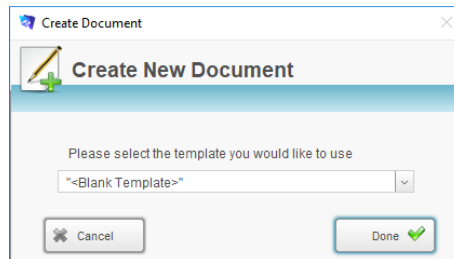
- Click once on the **Add Correspondence** button to display the **Create Document** dialog box.

Create Correspondence 

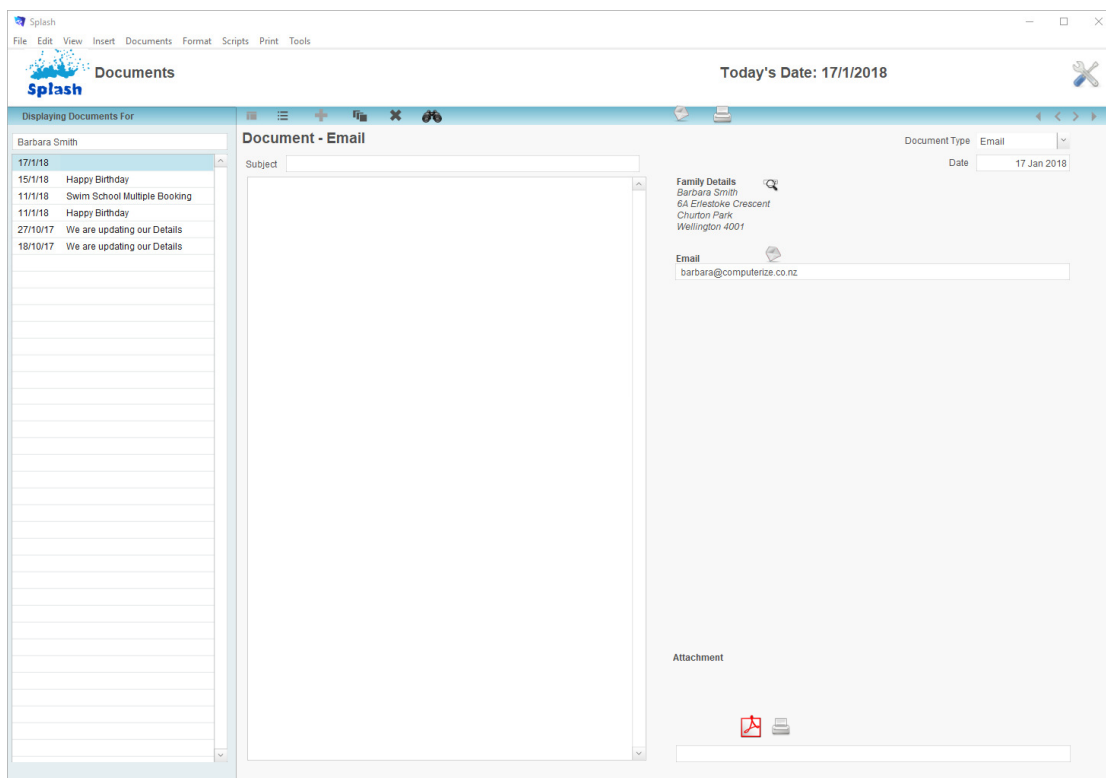
- Choose the type of document you want to create and click the **Done** button.



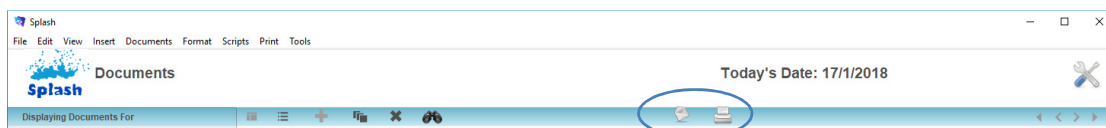
5. The **Create Document** dialog box will be displayed on your screen. Select the document you wish to use or click Use Blank Document and click **Done**.



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

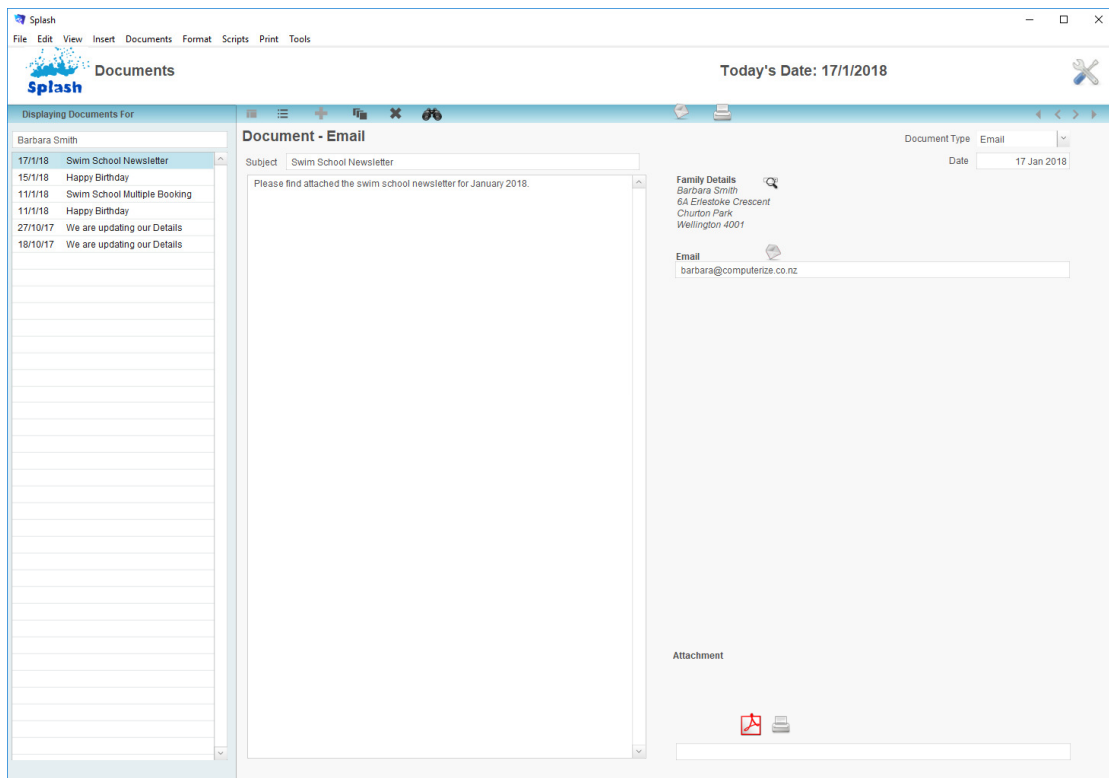


7. Edit the document as necessary.
8. Click the **Print** or **Email** button.



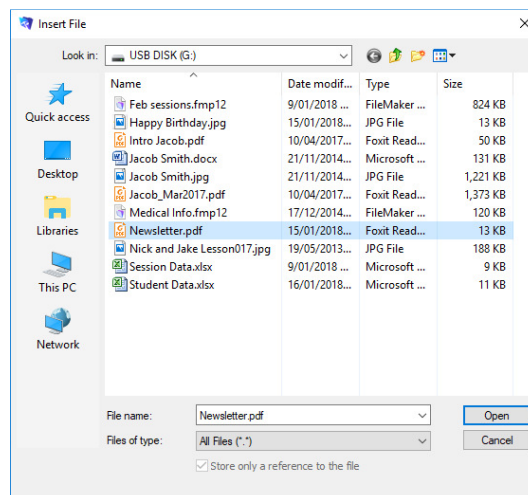
### **Adding an Attachment to an Email**

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.

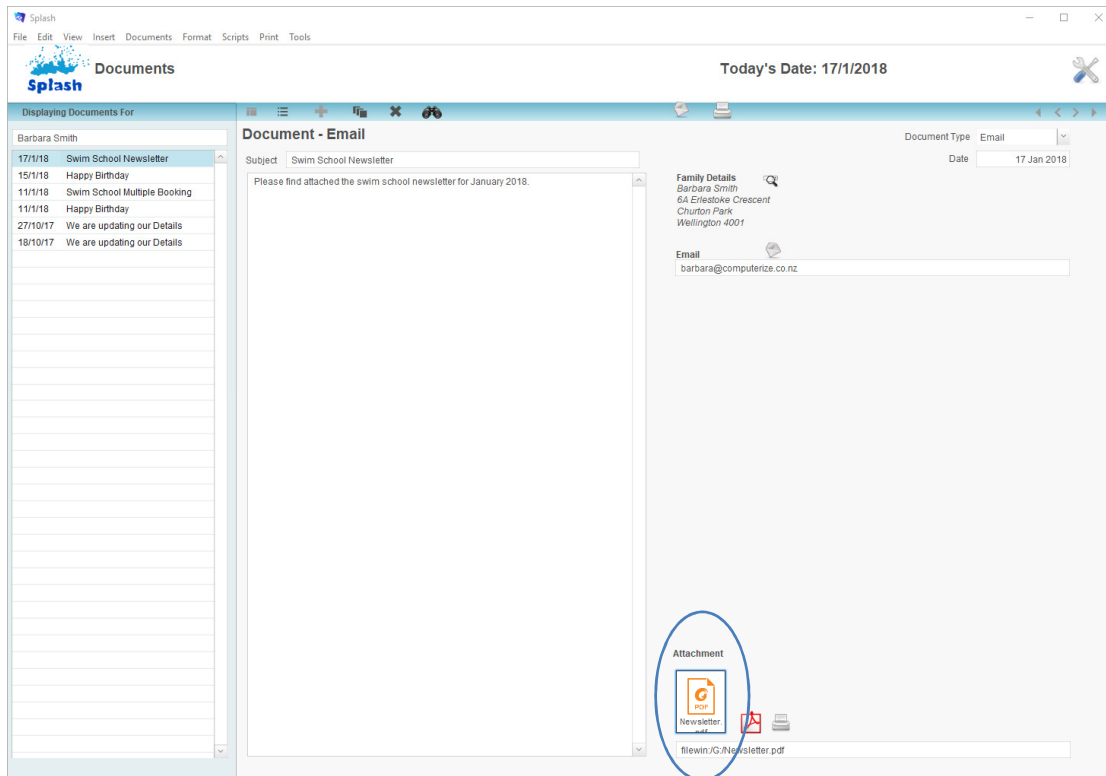


**NB:** The Attachment field and buttons are only on the screen for email document types.

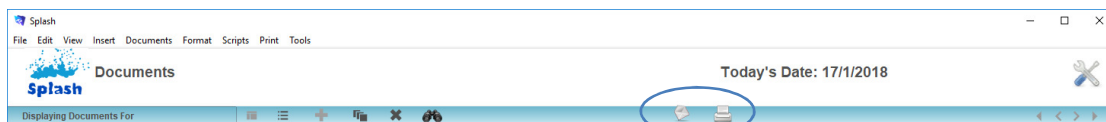
1. Ensure the correct email document is displayed on your screen.
2. Click once on the **Insert PDF** button.
3. The Insert File dialog will be displayed on your screen. Locate the file you wish to attach and click the Insert button.



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



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



**NB:** 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 0272222082

Family Members

Family Member	Age	Animal
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

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 bookings records 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		Paid		Balance	
				(Less Discount/Credits)					
<b>Smith (Barbara Smith)</b>				<b>0272222082</b>	<b>\$1,384.20</b>	<b>\$22.20</b>	<b>\$1,362.00</b>		
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 Insert Contacts Delivery Editing

To... barbara@computerize.co.nz From barbara@computerize.co.nz

Cc...

Bcc...

Subject Activity Report for Family Hide Cc & Bcc

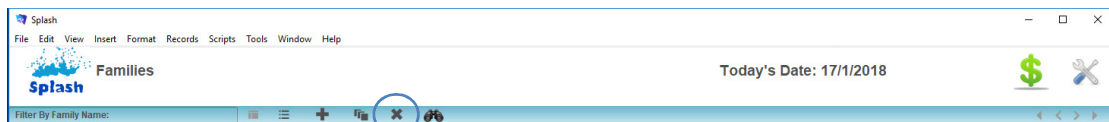
@ Family Activity Report.pdf (68.4 KB)

Please find attached the latest record of activity for the Smith family.

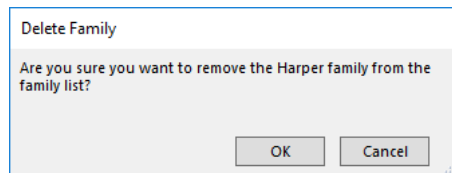
## Deleting a Family Record

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.

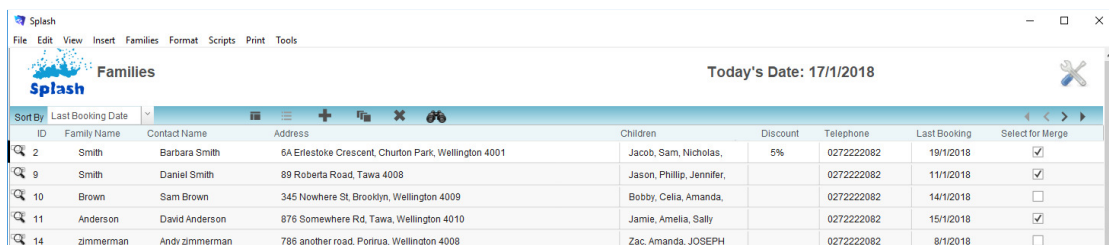
## Sending a Broadcast SMS Message

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.

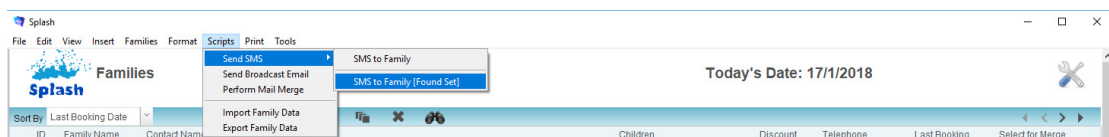
Group SMS messages are sent to all recipients in the found set that have a valid mobile telephone number stored on file.

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.

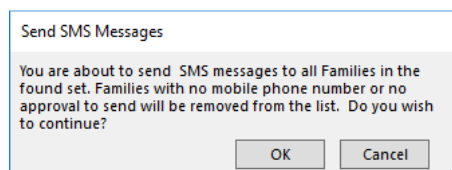
1. Use the **Finding a Family** function to locate the group of records you wish to send a message to. Locate only families with a mobile telephone number by placing an asterisk (\*) in the mobile field along with any other find criteria.
2. The found set of records will be displayed in a list on your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



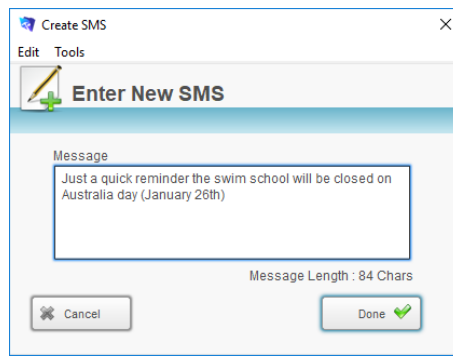
3. Select the **Scripts** menu... choose **Send SMS**...choose **Send SMS to Family [Found Set]**.



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.

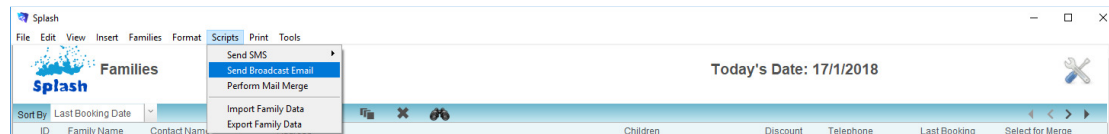
**NB:** Each SMS message is sent via your default email application.

## Sending a Broadcast Email

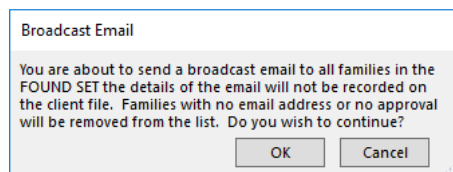
A broadcast email is a single email sent to multiple recipients. An email sent in this way will not be recorded on the family file.

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

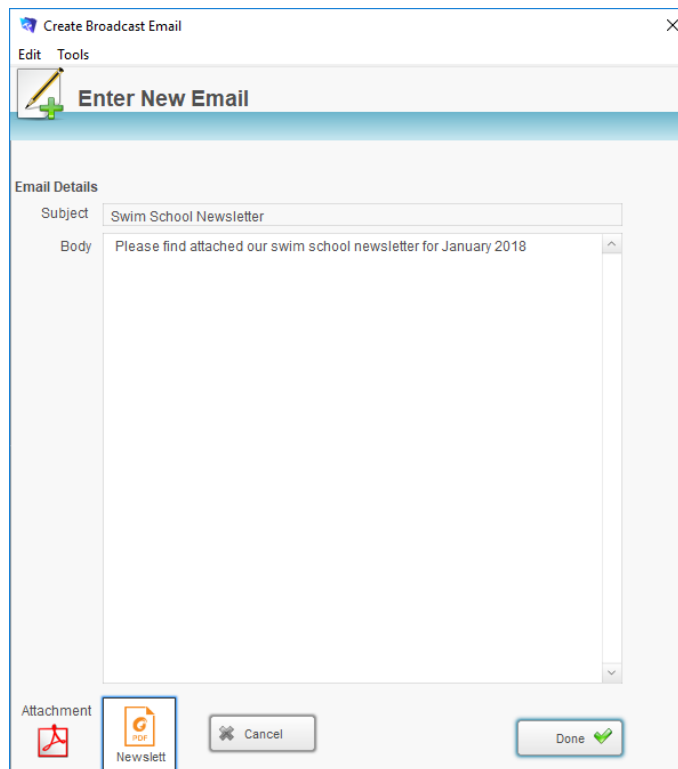
1. Use the **Finding a Family** function to locate the group of records you wish to send a message to. Locate only families with an email address by placing an asterisk (\*) in the email field along with any other find criteria.
2. The found set of records will be displayed in a list on your screen. (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.

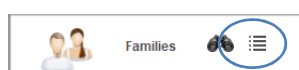
## Generating a Family Mail Merge

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	19/1/2018	<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 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, Tātahi 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

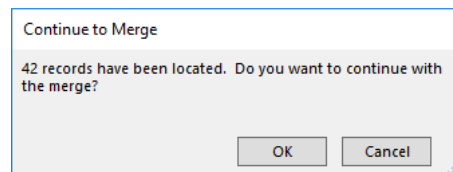


3. The Families List View screen will be displayed.
4. Click once on the **Find Marked** button displayed at the bottom right of the screen. This command will display a list of all families that are currently marked.

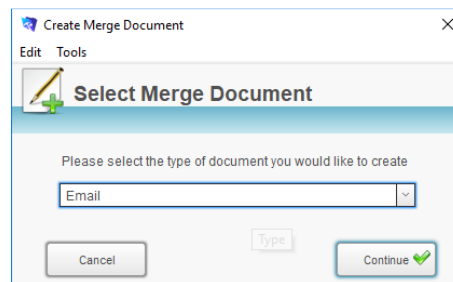
- Click once on the **Unmarked Found Set** button. This will clear all previously marked records.

2112	Williamson	John Williamson	987 Essex St. Masterton 5886	Peter	0272222062	15/1/2018	<input checked="" type="checkbox"/>
Displaying found set (42 out of 47)				Find Marked	Unmark Found Set	Mark Found Set	

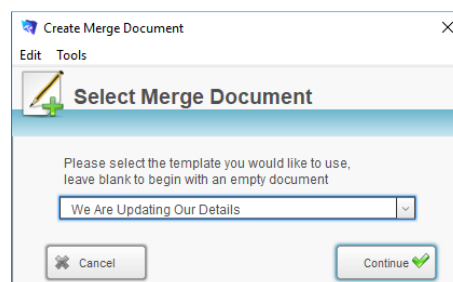
- Use the **Finding a Family** function to locate the group of records you wish to send a message to.
- The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 4)
- When the list is correct click once on the **Mark Found Set** button. A tick should appear for each family in the Mark column on the right of the screen.
- Repeat steps 4 to 6 above until all required families have been marked.
- Select **Perform Mail Merge** from the Scripts menu.
- 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.



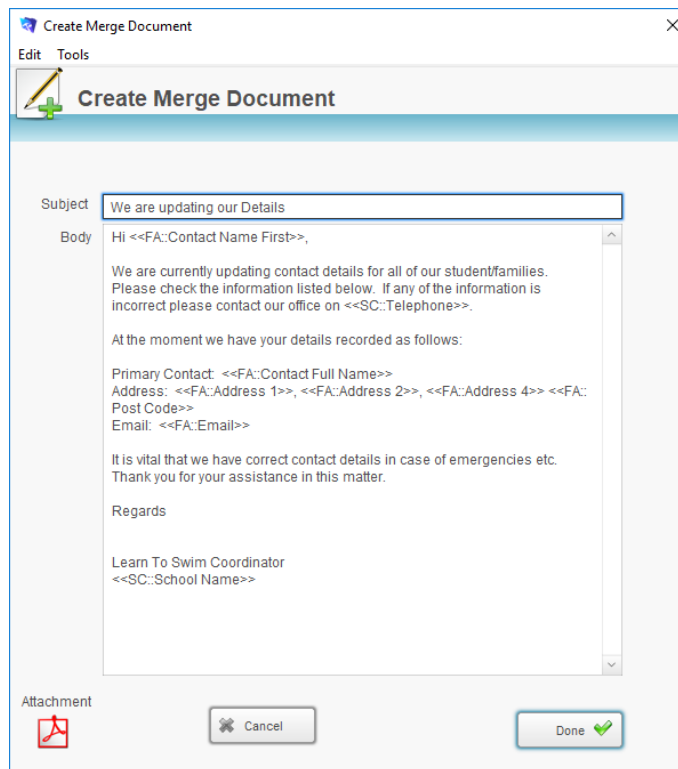
- The **Create Merge Document** dialog will be displayed asking you to define the type of document you wish to create. Select the required type of document from the drop-down menu provided.



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



- 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:

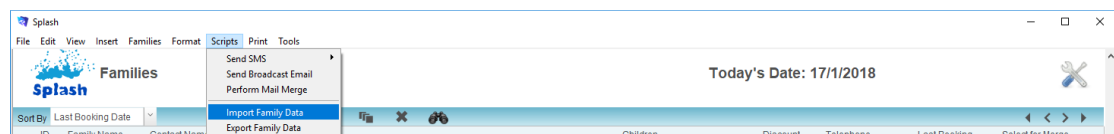
- add new records from the source file
- update records with information from the source file
- update matching records with information from the source file

### Importing Records from Excel

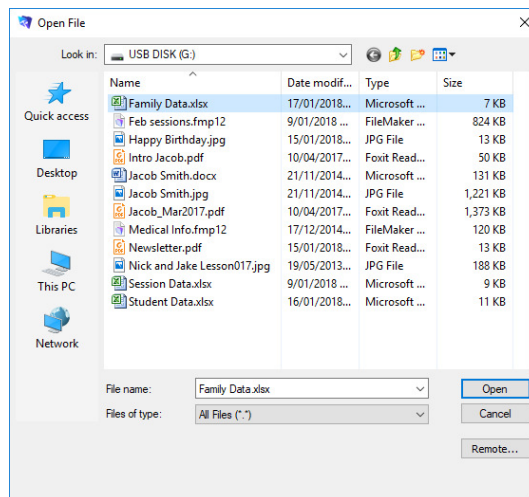
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families List** icon



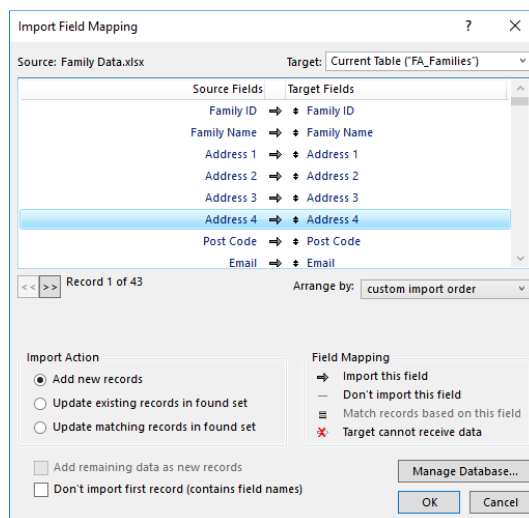
3. The Families List View screen will be displayed.
4. Select **Import Family Data** from the **Scripts** menu.





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.

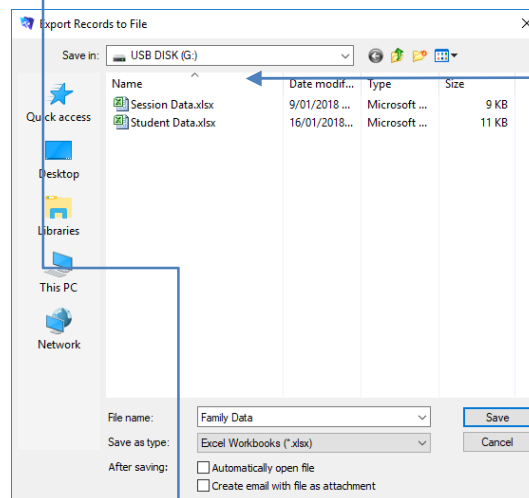


## Exporting Family Data

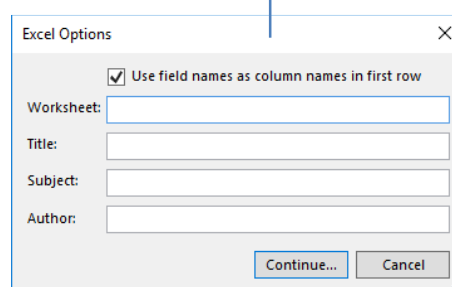
You can export Splash data to a new file and then open it in another application . For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

### Exporting Records to Excel

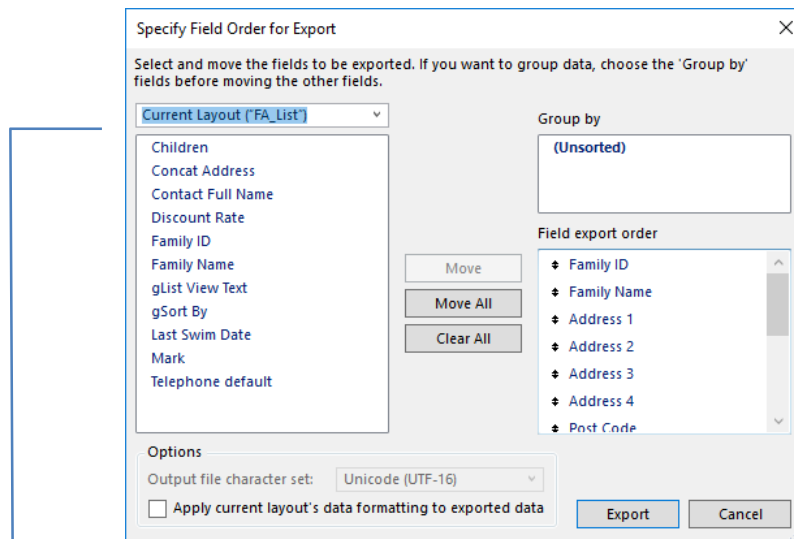
1. Use the **Finding a Family** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Family Data** from the **Scripts** menu.
4. The **Export Records to File** dialog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



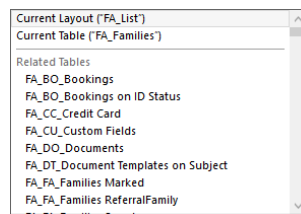
6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



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.



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.

Family Data.xlsx - Microsoft Excel non-commercial use									
Family ID									
	A	B	C	D	E	F	G	H	I
	Family ID	Family Name	Address 1	Address 2	Address 3	Address 4	Post Code	Email	Telephone default
1									
2		2 Smith	6A Eriestoke Crescent		Churton Park	Wellington		4001 barbara@computerize.co.nz	0272222082
3		9 Smith	89 Roberta Road	Tawa				4008 computerize@xtra.co.nz	0272222082
4		10 Brown	345 Nowhere St	Brooklyn		Wellington		4009 computerize@xtra.co.nz	0272222082
5		11 Anderson	876 Somewhere Rd	Tawa		Wellington		4010 computerize@xtra.co.nz	0272222082
6		14 Zimmerman	786 another road	Porirua		Wellington		4008 computerize@xtra.co.nz	0272222082
7		15 Thomson	25 Churton Drive	Churton Park		Wellington		4001 computerize@xtra.co.nz	0272222082
8		16 King	46 Brooklyn Rd	Brooklyn		Wellington		4008 computerize@xtra.co.nz	0272222082
9		17 White	76 Moorefield Road	Johnsonville		Wellington		4001 computerize@xtra.co.nz	0272222082
10		18 Fairbrother	56 West St	Tahiti Bay		Wellington		4012 computerize@xtra.co.nz	0272222082
11		19 Hughson	98 Barrett St	Ngaio		Wellington		4007 computerize@xtra.co.nz	0272222082
12		20 McDougal	118 South St	Newlands		Wellington		4006 computerize@xtra.co.nz	0272222082

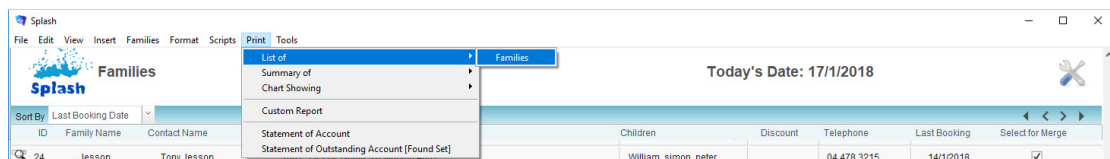
## Printing Family Reports

You must be in the Families module of Splash to generate the following reports. All reports are accessed from the Print menu.

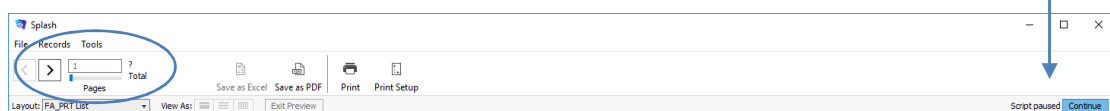
### Printing a List of Families

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.

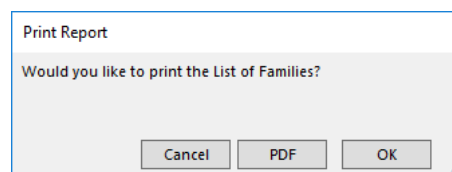
1. Use the **Finding a Family** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Families** from the pop-out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



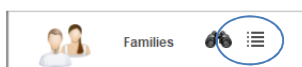
6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

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

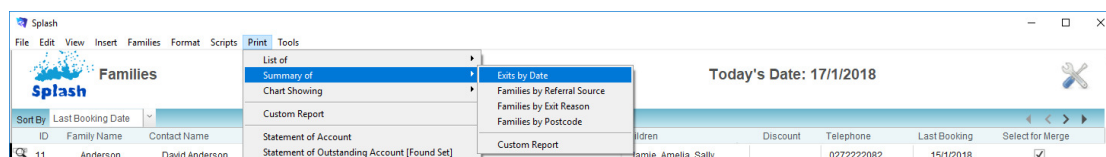
## Printing a Summary of Exits by Date

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



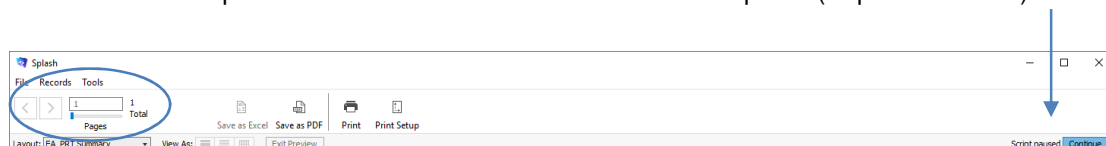
3. The Families List View screen will be displayed.
4. Select **Summary of ...** from the Print menu and select **Exits by Date** from the pop-out menu displayed.



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 a title bar, a message 'Please specify the start and end date for the reporting period.', and 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 screenshot of the 'Print Report' dialog box. It contains a title bar, a message 'Would you like to print the Summary of Exits?', and 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.

Summary of Families Summary of Exits		
	Number of Families	Number of Students
Financial	1	3
Goals Met	2	2
Other Commitments	1	4
Poor Service	1	4

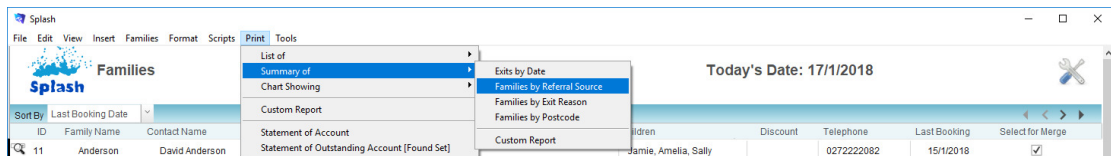
## Printing a Summary of Referral Source

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



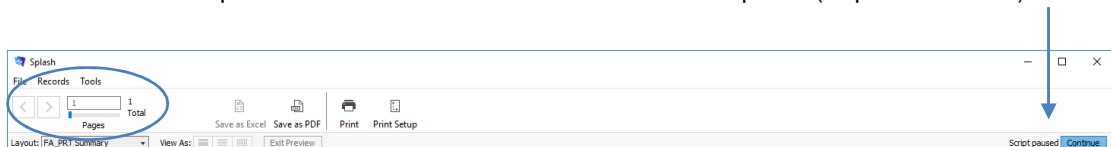
3. The Families List View screen will be displayed.
4. Select **Summary of ...** from the Print menu and select **Families by Referral Source** from the pop-out menu displayed.



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, 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 dialog box titled 'Print Report'. It contains the text 'Would you like to print the Summary of Referrals?'. At the bottom, there are three buttons: 'Cancel', 'PDF', and 'OK'.

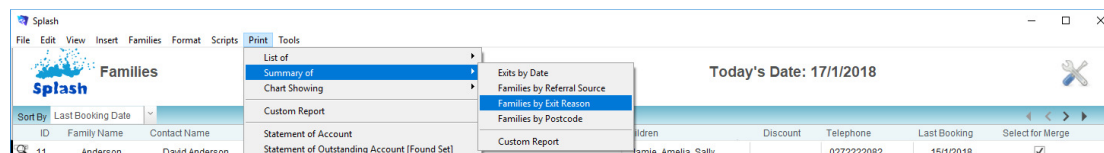
8. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Summary of Families		
Summary of Referrals		
	Number of Families	Number of Students
	34	80
Existing Client	2	5
School	1	4
Total Reported	37	89

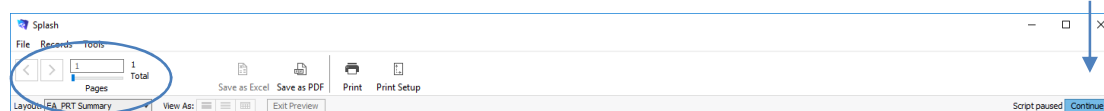
## Printing a Summary of Exit Reasons

This report counts the number of families and the number of students who have exited the swim school.

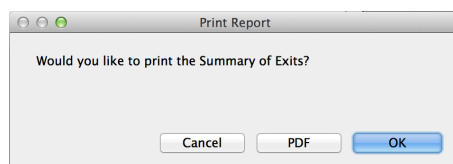
1. Use the **Finding a Family** function to locate the group of exited families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Families by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



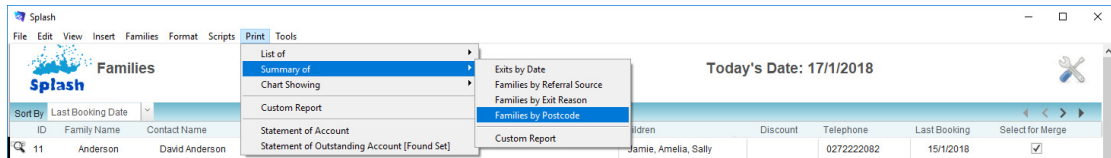
6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Summary of Families		
Summary of Exits		
	Number of Families	Number of Students
Financial	1	3
Goals Met	2	2
Other Commitments	1	4

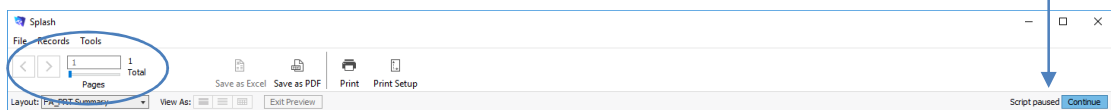
## Printing a Summary of Postcodes

This report counts the number of families and the number of students for each postcode.

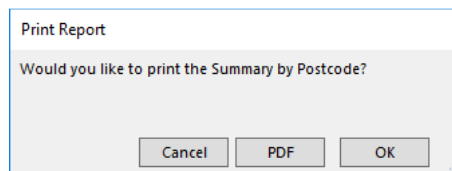
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Families by Postcode**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

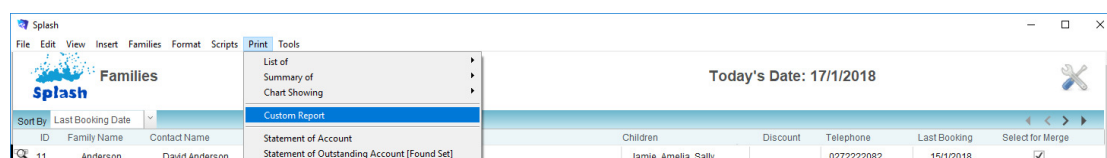
Summary of Families Summary by Postcode		
	Number of Families	Number of Students
PC = :4000	2	2
PC = :4001	4	10
PC = :4002	1	3
PC = :4005	2	6
PC = :4006	1	3
PC = :4007	4	9
PC = :4008	6	16
PC = :4009	1	4
PC = :4010	7	18
PC = :4012	1	2
PC = :5886	1	1
PC = :6007	1	
Total Reported	31	74

## Printing a Custom Report

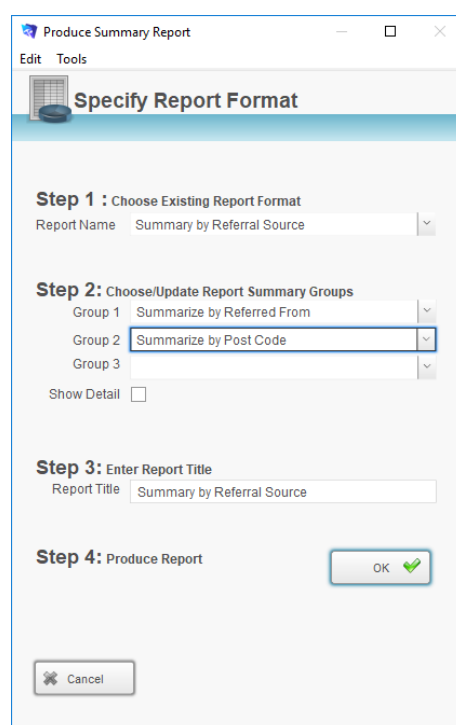
In addition to the generic family reports, Splash provides custom report writing. Custom reports are specific reports layouts where you can change the grouping for summary totals.

### 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.



1. 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)

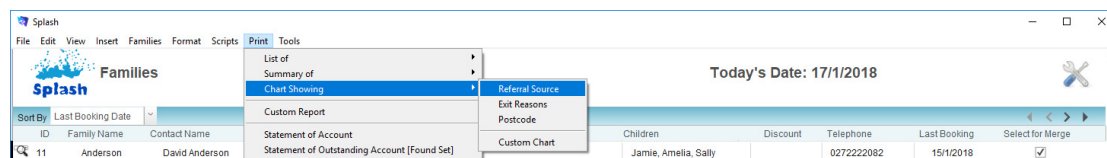
Information in the report below has been grouped by the same categories, however this time **Show Detail** has been selected.

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 Whangaeahu Valley Rd, Masterton 5886 0272222082
Television	1	
Smith		1243 Any Street, Wellington 0272222082
Total Reported	6	10

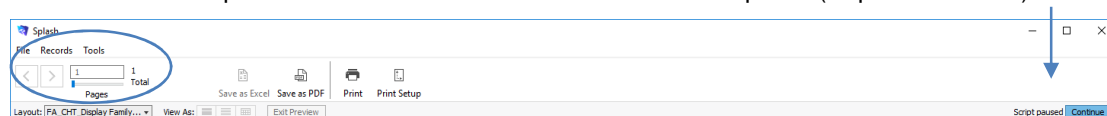
## Printing a Chart

### Printing a Chart Showing Families by Referral Source

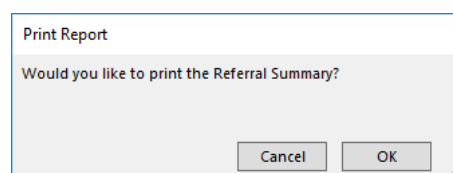
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Referral Source**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



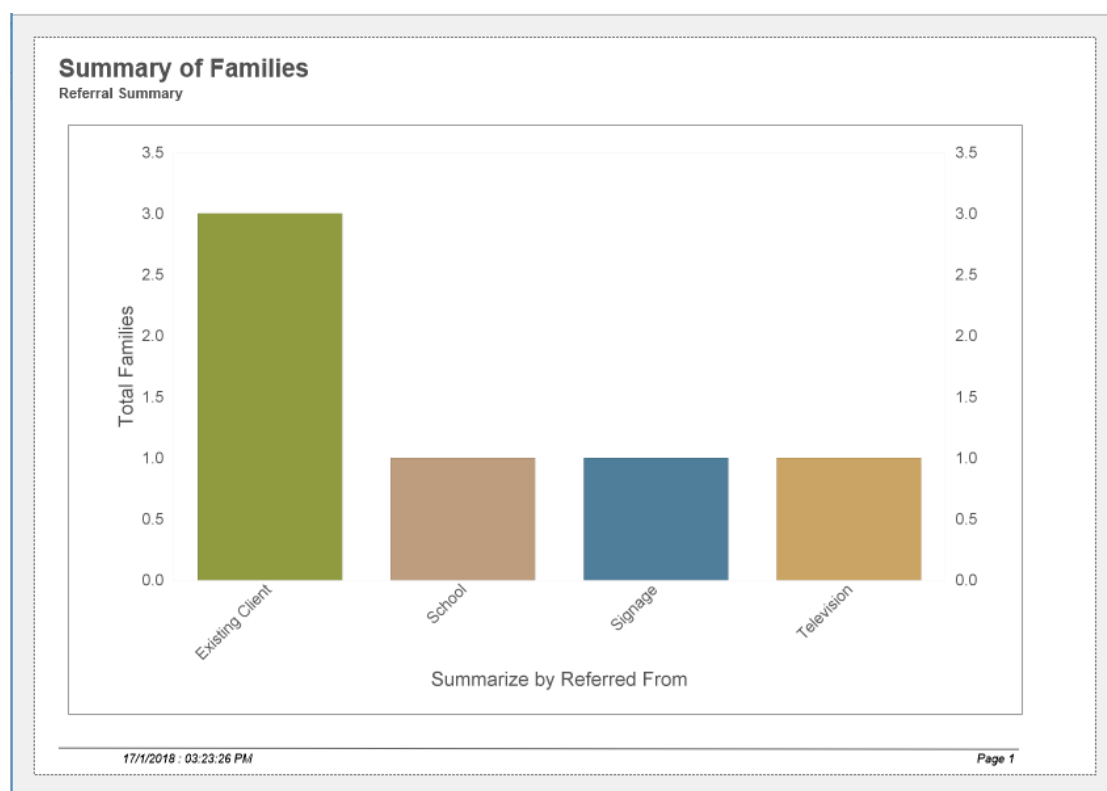
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



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

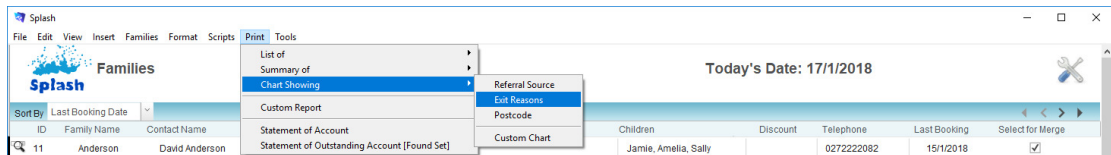


6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

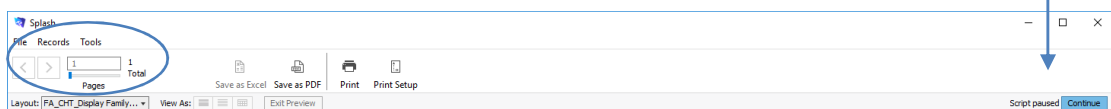


## Printing a Chart Showing Families by Exit Reason

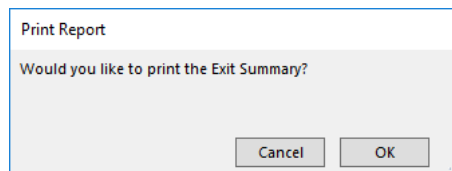
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Exit Reason**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



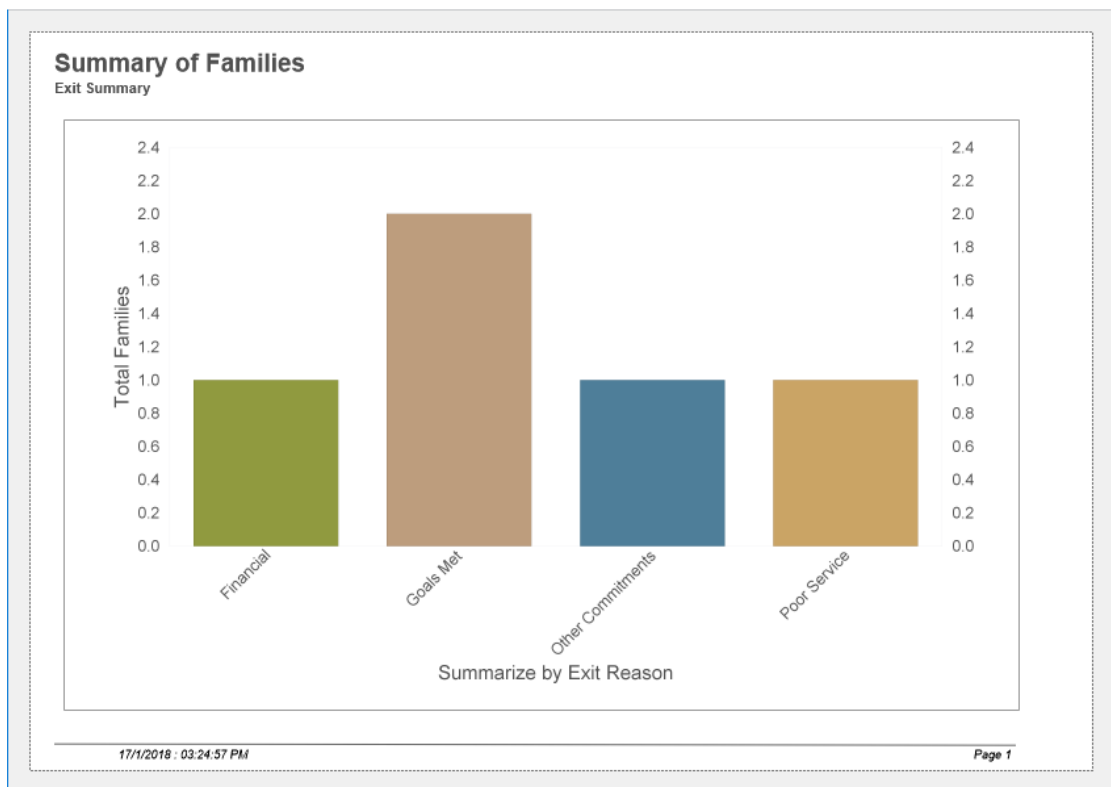
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



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

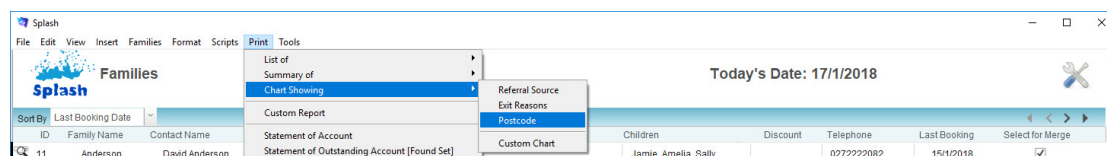


6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

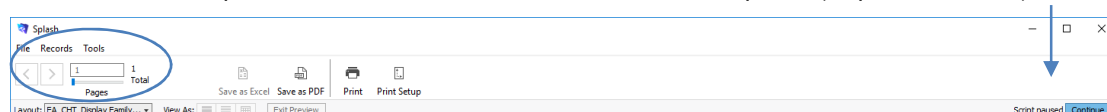


## Printing a Chart Showing Families by Postcode

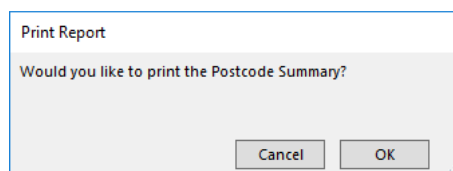
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Postcode** from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

