

# DanceONE

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# Getting Started

## C H A P T E R 1

### Introduction

---

Welcome to DanceONE! We hope DanceONE meets your expectations. It's designed to be powerful and flexible and still easy to use.

We love to hear from our customers. We especially appreciate hearing your ideas about improving DanceONE. Please feel free to contact us at any time.

### Installation

---

Please follow these steps to install DanceONE. If you have any questions or problems give us a call.

- 1 - Insert your DanceONE CD into the CD drive.
- 2 - If the installation program does not automatically start do the following.

Select the Start button on the Windows desktop.  
Select Run.  
Type **D**:setup (where **D** is the drive letter of your CD drive) and hit enter.

- 3 - Follow the instructions in the installation program to either install or upgrade your DanceONE program. Generally you can accept the default information on the installation windows.

Note: If you are upgrading from an earlier MS-DOS version of the DanceONE program and you want to convert your old data to be used with the new version, it is important that you **do not** install the new version

of DanceONE in the same directory/folder as your previous version. By default, the Windows version of DanceONE will install in the “c:\program files\ONE Software\DanceONE” folder. By default, the MS-DOS version of DanceONE installed in the “c:\DanceONE” folder.

You will need to know the location of your old DanceONE data in order to convert it to work with the new DanceONE. The process of converting your data is explained later in this chapter.

### Converting Your Data

---

If you are upgrading from an earlier version of DanceONE you will need to convert your data to work with the new version. Before upgrading, or converting the data it is probably a good idea to make sure you have a good backup of your existing DanceONE data. As was mentioned above, if you are upgrading from the MS-DOS version of DanceONE it is important that you not install the new version in the same place or on top of your old version.

After installing the upgrade, follow the conversion instructions that are included in your upgrade package. You will selected either the “Upgrade from Previous MS-DOS Version” or “Upgrade from Previous Windows Version” depending on the version of DanceONE you have been using.

## Backing Up Your Data

It is extremely important that you backup your DanceONE data files on a regular basis. How often you should back up is determined by how often you use DanceONE. If you use the program every day, it is a good idea to back up every day or two. If you use DanceONE once a week then a weekly backup would suffice.

The DanceONE information in your computer can become damaged for any number of reasons. If you have a recent back up you should be able to recover from this type of problem with a minimum of effort. If you don't have your files backed up it could take days or weeks of effort to recover.

### DanceONE Data Files

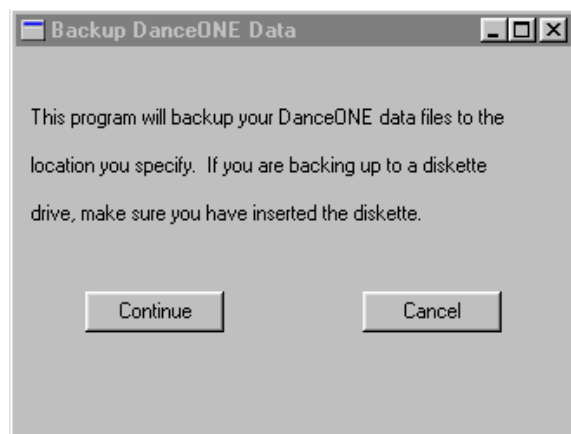
The following are the DanceONE data files that require backing up;

K1.D01  
K1.D02  
K1.D03  
K1.D04  
K1.D05  
K1.K01  
K1.K02

These files can be identified by the name **K1.???** where the question marks are wild card characters..

### Backing Up

To backup your DanceONE data follow these steps:



1-Make sure DanceONE is not currently running.

2 - From the Start menu select Programs then DanceONE. On the DanceONE menu select the Backup option.

2- The “Backup DanceONE Data” window will be displayed.

3-Select the Continue button and a file dialog window will be displayed. On the file dialog window you can specify the name of the backup file you wish to create and the location for the file.

Backup files can be put on your local hard disk, on a diskette, a writeable CD, a zip drive, or if you are connected to a network the backup file can be placed on a networked drive. It is important to remember the location in case it becomes necessary to restore the data from the backup file.

### Other Backup Methods

There are many good backup programs available for your computer that make the task of backing up all the important information on your computer much easier. If you are interested in one of these programs, a local computer or software store should be able to help you.

Be sure to have a few formatted floppy disks ready when you start your backup.

**Note:** If you are using diskettes, it is best to have multiple sets of backup disks that you alternate using to do the back up. For example, if you are backing up every day you could have a backup disk(s) for each day. By having multiple sets of disks, you will minimize the loss of information if one of your backup disks should go bad.

If you have questions about backing up or restoring DanceONE data please contact ONE Software technical support.

### Restoring Your Data

To restore your data, click on the start button and then Programs. DanceONE, Backup and Restore, Restore DanceONE data. Insert your backup disk and follow the same steps above to locate and restore from your backup file.

You will be asked to Insert the Last Disk of Your Backup Set. If you only have one disk, hit any key to continue. You will next see a message indicating that a file already exists and asking if you want to overwrite



the file. Enter “a” for all at this point and the restore will proceed.

If you have only one backup disk but get a message asking for a second disk, it means that your backup diskette is bad. If you are transferring data from another machine, you should get a new diskette and return to the other computer to backup the data again.

## Repairing Your Data

Under certain circumstances it is possible that your DanceONE database can be corrupted. The most common cause for this type of corruption is having more than one copy of the single user version of DanceONE running simultaneously. If the data has become corrupted, error messages indicating various database problems will be displayed as DanceONE is running. To repair these problems follow these steps:

1 - Make sure DanceONE is not running

2 - From the Start menu select Programs->DanceONE->Utilities->Fix It.

3 - When the Fix It program runs, it will display a variety of information on the screen. When it has finished, it will display a line that says “x number of errors encountered in x number of records/nodes” where “x” is the number of errors. If after running Fix It one time the number of errors is not 0 (zero) return to step 2 and run Fix It again. After running Fix It two times the message should indicate 0 (zero) errors. If it does not, please contact DanceONE technical support.

## Getting Help

If you have a question about using DanceONE that you are unable to answer by consulting the manual or the on screen help then please call our technical support line. The toll-free telephone number is **(800)574-3078**. The line is answered by technical support representatives between 9:00 A.M. and 2:00 P.M., Mountain Time, on Monday through Friday. If you need to call at some other time please leave a message on our answering machine and we will return your call.

When you call for technical support you may be asked for the DanceONE serial number. This number can be found on the packing list that came with your order. You may want to make a note of the serial number.

When you call for help it is a good idea to be at your computer if possible.



# Using DanceONE

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## C H A P T E R 2

### Starting DanceONE

---

To start DanceONE you will need to follow these steps:

When DanceONE is installed a program group and DanceONE icon is added to the Program Manager (Windows) or the Start Menu (Windows95). Selecting the DanceONE icon or Start Menu option will start the program. To start DanceONE from the Start Menu, click on the Start button then selected Programs then DanceONE then DanceONE again.

### What To Do Next

---

DanceONE is very flexible and provides a variety of ways to accomplish many of the tasks you will be doing. Listed below is a sequence of steps you may want to follow in order to familiarize yourself with the program and begin using it productively. These are just suggestions and you should feel free to diverge from this suggested sequence if you want to investigate other areas of the program.

You should probably read the rest of this chapter in the manual and at least glance through the remaining chapters. This chapter contains information about working with DanceONE that applies to all areas of the program and that will be very useful as you familiarize yourself with DanceONE.

One of the first things you will want to do after starting DanceONE is to complete the general option windows. For more details on these windows see the section in Chapter 3 titled General Information.

If you will be using DanceONE to automatically calculate charges, you may want at this time to read Chapter 7 on Billing and complete the general billing information windows. If you want you could easily wait until you are more familiar with DanceONE to complete this step but, it will need to be done before you use the program to compute charges.

If you have different locations where classes are taught or if the classes are taught by different instructors, now would be a good time to enter location and instructor information. See the sections in Chapter 3 title "Locations" and "Instructors".

After entering general information, the bulk of your work in DanceONE will probably be with students, families and classes. There is no required order for entering student, family and class information. For example, you could enter class information first and then when entering student information enroll students in classes on the student window. You can also enroll students in classes on the class window.

You may want to spend some time experimenting with DanceONE in order to find the approach that works best for you. The following suggestions may be helpful.

You may find it useful to enter class and family information before students. Then, as you enter your student information you can put the students in their families and enroll them in classes if you desire.

Reading the family, student and class sections in Chapter 3 should help you understand the relationship between the three in DanceONE.

oYou should now be familiar with the basics of DanceONE. Reading through the other sections of chapter 3 as well as chapter 4 on Processes, chapters 5 and 6 on reports and chapter 7 on billing will give you some ideas of ways DanceONE will be useful in your dance business.

### Keyboard Shortcuts

---

The following keyboard shortcuts may prove useful to you as you work with the DanceONE program.

Alt-F4	Close down the program
Ctrl-F4	Close the top-most window
Ctrl-Tab	Cycle through the currently open DanceONE windows

## Entering Names

---

Certain information is stored by DanceONE in alphabetical order. For example, students are stored in alphabetical order by their names. For this reason we highly recommend that the following names always be entered as last name first then a comma and a space then the first and middle names:

Student names,  
Family names,  
Instructor names.

Student John Robert Doe should be entered into DanceONE as Doe, John Robert. His parents John and Jane would be entered in the family window as Doe, John and Jane (or Jane and John).

If you enter a name on the student, family or instructor windows without a comma, DanceONE will give you a warning but will permit it.

DanceONE will reverse the name or select just the first name where necessary. For example, on billing statements printed for the parents, only the students first name will be printed.

## Entering Dates

---

Dates should be entered into DanceONE using numbers and dashes. The correct format is month-day-year. December 1, 1992 would be entered as **12-1-92** or **12-01-1992**.

## Entering Amounts

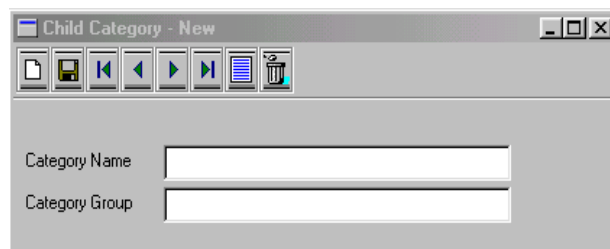
---

Dollars and cents should be entered into DanceONE with the decimal point. One dollar could be entered as **1** or **1.0** or **1.00**. A dollar and a quarter would be entered as **1.25**. Entering **125** would be one hundred and twenty-five dollars.

## Using Buttons and the Tool Bar

---


Located across the top of most DanceONE screens is what we call the "tool bar". The tool bar contains one or more "buttons" that when selected will perform an action. Notice the tool bar across the top of the child category window below.




The buttons on the toolbar can be selected using your mouse. Some of the more commonly used buttons may also be selected by using the following hot key combinations;

- Alt-N for New
- Alt-S to Save
- Alt-F for First
- Alt-P for Previous
- Alt-X for Next
- Alt-T for Last
- Alt-L to List
- Alt-D to Delete

The buttons you see on the window above are the standard buttons used on most DanceONE information windows. The purpose of each of the buttons is explained below.

 **New:** The new button is selected with the mouse or with the **Alt-N** hot key combination. When you select this button DanceONE will clear the screen so that you can enter a new information record. The title bar of the current window will indicate that you are entering new information.

 **Save:** The save button is selected with the mouse or with the **Alt-S** hot key combination. This is a very important button. Use it to tell DanceONE to save the information you have entered in the window. Simply typing the information onto the screen **does not** result in the information being saved in your computer. You must select the save button. The save button can be selected at any time while you are working with information in the window.

If you select the save button while working on a record that already exists in the computer, any changes you have made are saved and the record remains in the window. If you are entering a new record and select the save button, your new record is saved.

Most of the information you will work with in DanceONE is stored in a certain order. Typically the order is either alphabetically or in date order.

Information about students that you enter on the student window is stored alphabetically by the student's name. The following five buttons help you navigate through your information based on the order in which it is stored.



**First:** The first button is selected with the mouse or with the **Alt-F** hot key combination. Selecting this key will display the first information record in the window. In the student window, this would be the student record that is alphabetically first.



**Last:** The last button is selected with the mouse or with the **Alt-T** hot key combination. Selecting this button will display the last record in the window.



**Next:** The next button is selected with the mouse or with the **Alt-X** hot key combination and displays the next record.



**Previous:** The previous button is selected with the mouse or with the **Alt-P** hot key combination and displays the previous record.



**List:** The list button is selected with the mouse or with the **Alt-L** hot key combination. When selected, the list button will present you with an ordered list of all the records belonging to the window from which you can select a record. Working with lists is described in more detail in the section in this chapter titled "Using Pop-up Selection Lists".



**Delete:** The delete button is selected with the mouse or with the **Alt-D** hot key combination. Selecting this button allows you to delete the record currently displayed in the window. Before DanceONE deletes the record, you will be presented with a window asking you to confirm your intention to delete the record. Selecting the "Yes" button in this window will delete the record, selecting the "No" button returns you to the original window with the record not deleted.

## Using Radio Buttons

---

The class window shown below has examples of both radio buttons and check boxes (discussed in the next session).

On this class window radio buttons are used to specify both the gender of the class members; male, female or

both, and the level of the class; beginning, intermediate or advanced. Radio buttons get their name from the selection buttons used in car radios. The distinguishing feature of radio buttons is the fact that only one button of a group can be selected at a time. On the class window, only one choice for class gender and one choice for class level can be selected for each class.

To select a radio button, first move to the radio button box and then use the up and down arrow keys to select the correct button. Unlike most other window fields in DanceONE, you cannot leave a group of radio buttons (or check boxes) by pressing the **Enter** key. Instead, you must use the **Tab** key to move to the next window item.

## Using Check Boxes

---

Check boxes are similar to radio buttons but differ in two important ways. First, unlike a group of radio buttons in which only one button may be selected at a time, any or all or none of the check boxes in a group may be checked. For example, on the class window shown above, check boxes are used to indicate whether the class is being taught in the current session and whether the class will be taught in the next session. Either one, neither one or both of the boxes may be checked.

The second difference between check boxes and radio buttons is in the method used to check (or uncheck) the check box options. To work with check boxes on a window:

You can click on the checkbox with your mouse to check or un-check it, or do the following,

- 1- Move to the group of check boxes on the window,

- 2- Use the up and down arrow keys to highlight the check box you are interested in,

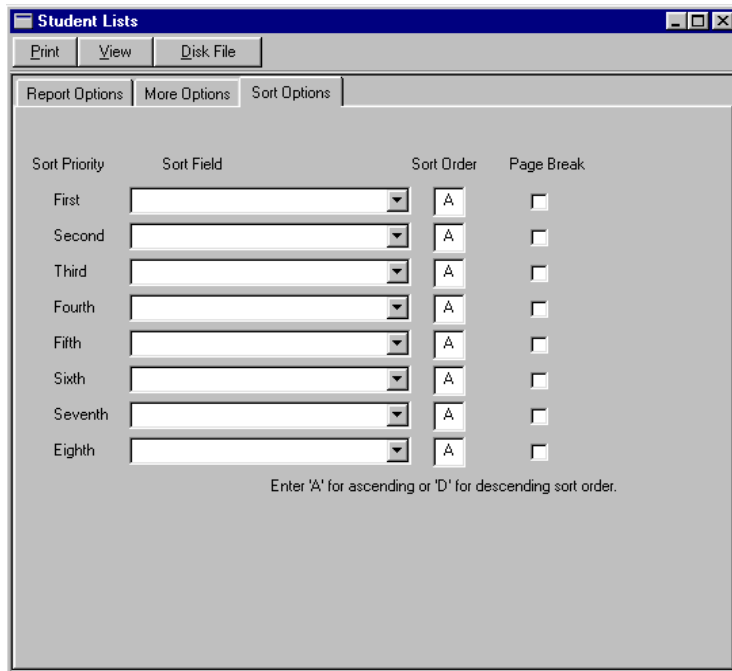
- 3- Use the **Enter** key or the **Space Bar** to toggle the check on or off.

## Using Combo-Boxes

---

The sort selection window shown below contains several combo-box fields. These fields are identified by the down arrow at the right end on the field. Clicking on the down arrow or pressing the **Enter** key

will display a list of the possible selections for the combo-box field. In the sort selection window below, the list of possible selections contains the fields from the student record that can be used for sorting the student records prior to printing a student report. Use the up and down arrow keys to highlight the selection you want and then press **Enter**. The selection list will disappear and the item you have selected will be



displayed in the combo-box field. Since pressing the **Enter** key will redisplay the selection list, you will need to use the **Tab** key to move to the next field.

## Getting Help

On-screen help is available for most windows in DanceONE. In most cases, the on-screen help will be the same information that you find in this manual.

**F1** is the help key. Hitting **F1** will bring up a window displaying help information related to the window you are currently working with. Use the up and down arrows and the **PgUp** and **PgDn** keys to move around in the help window.

## Using Pop-up Selection Lists

Pop-up selection lists or windows are used throughout DanceONE. A good understanding of how to use these lists will help you be more efficient in your use of DanceONE.

Selection lists display a list of records and allow you to select the one you are interested in. For instance, on virtually any data entry window, selecting the list option from the tool bar (**Alt-L**) will display a list of records previously entered in the window. Selecting the list option from the tool bar on the student window will display a list of all students currently entered into DanceONE.

Once the selection list is displayed you can either

- 1) close the list window to return without making a selection or
- 2) select one of the records on the list to work on. To select a record from the list, move the highlight bar until it highlights the record you want, then hit the **Enter** key or using the mouse simply double-click on the desired record.

Several keys can be used to move the highlight bar in the selection window. The up and down arrow keys will move the bar up or down one record respectively. **Page Up** or **Page Down** will move the highlight bar to the top or bottom of the current window. If the highlight bar is already at the top or bottom of the window when you hit **Page Up** or **Page Down** a new window full of records will be displayed. Using **Page Up** or **Page Down** you can "page" backwards and forwards through the entire list of records. Hitting **Page Up** at the top of the list or **Page Down** at the bottom of the list will have no effect.

Hitting the **Home** key will take you directly to the top of the list. The **End** key will take you directly to the bottom of the list.

Many record lists are kept in alphabetical order (students, classes, families, etc). **You can move through these lists by typing the first few letters of the name of the record you are interested in.** Start typing the name while the list is displayed. You will not see the letters you are typing but the list will be repositioned with each typed letter. For example, if you wanted to select John Smith's student record from a student selection list (assuming you had entered his

name like this: Smith, John) you would first type **S** (be sure to capitalize). The highlight bar would be positioned on the first child whose last name begins with S. Next you would type **m** and then as much of John's name as you like. Each letter you type brings you closer in the list to the name you are searching for. Usually however, it is only necessary to type two or three letters to get close to the name, then it may be more efficient to use the up and down arrow keys to highlight the name.

As you work with DanceONE you will notice the extensive use that is made of selection lists. As we mentioned above, on almost all data entry windows, the list option on the tool bar will display a selection list.

## Working With Notes

Using the notes capability of DanceONE you will be able to record any narrative type information you think will be useful. The notes you record can relate to students, families, or applicants. Your notes will be organized and easily accessible when you need them.

categories you can establish, no limit to the number of notes you can record for any student or family and practically no limit to the length of any single note.

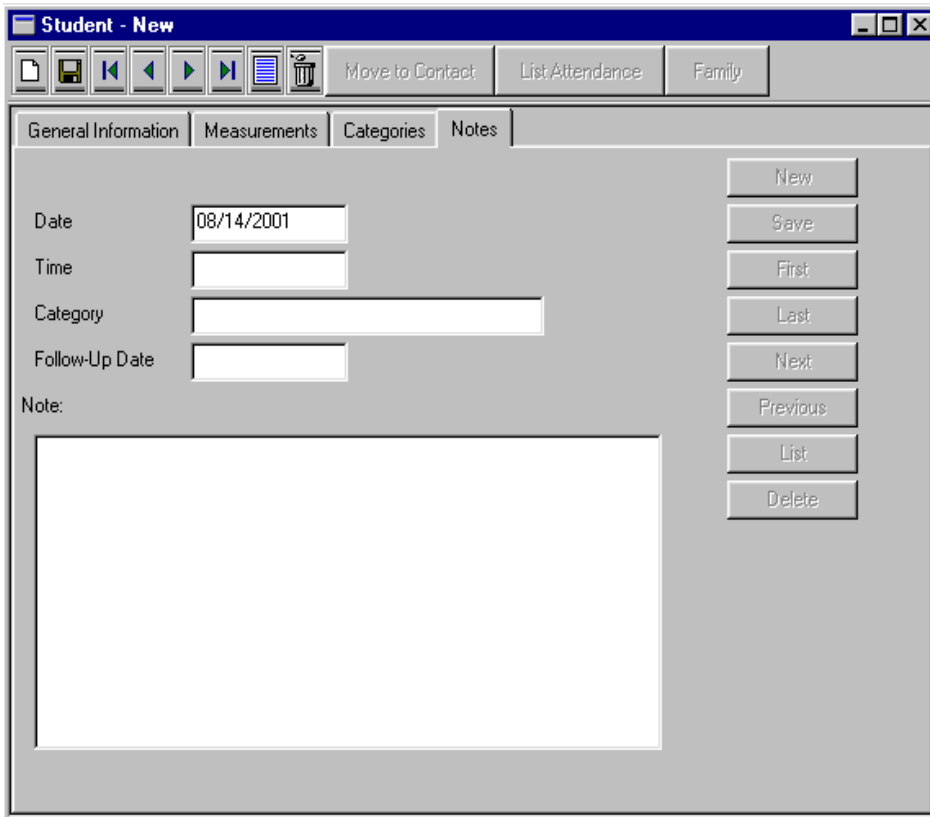
The student note windows will be used in the following explanation of how to use notes. The same procedures apply to family, employee and applicant notes.

To record a note about a student start with the student window shown above. Before notes can be recorded for a student the student's record must be saved. If a record has been saved the student's name will appear in the window title.

When the student's record is shown on the student window, select the "Notes" tab at the top of the student window.

The student notes window shown below will be displayed. If one or more notes have previously been recorded for this student, the note with the earliest date will be displayed. Otherwise the fields on the window will be blank and the status line in the upper right corner will show "New".

To record a note follow these steps:



1 - Select the **New** button on the Notes window to start entering a new note.

2 - **Date:** Enter the date of the note in the date field. Although the date is optional, because DanceONE organizes the student's notes by date, it is a good idea to use a date.

3 - **Time:** Enter a time for the note if appropriate. This field is optional. For additional information see the section in this chapter titled "Entering Times".

4 - **Category:** Note categories are a useful way to organize your notes in a way that makes sense for your business. Whatever your needs, you have complete freedom to establish as many different note categories as are required. For additional information on entering note categories see the following section.

You can establish your own categories for notes. There is no limit to the number of different note

## Chapter 2, Using DanceONE

To specify a category for your note, you must select the category from the category list. This list of available categories will be displayed any time you change the information in the "Category" field and hit **Enter** or **Tab**. For example, if the category field is blank and you want to select a category you have established called "Accidents", type in "A" in the Category field and hit **Enter**. A list of all the categories you have entered will be displayed. Highlight the category you need and hit **Enter**. The name of the category will now be displayed in the Category field.

To change the category shown in the Category field simply type part or all of the new category name in the field, hit **Enter**, and select the new category name from the list as described above.

**5 - Follow-Up Date:** You may optionally enter a date for following-up on this note. You may then print out reports covering any time frame showing notes that require a follow-up.

**6 - Note:** You should enter the text of your note in the text box below the follow-up date field. As you enter the note, the note text will automatically wrap around to the next line once a line is full. Hit the **Enter** key to move to the next line.

**7 - Save:** Click on the "Save" button with your mouse to save the note after entering the note information.

**Buttons on the Notes Window:** Along the right side of the notes window are the following buttons:

**New:** Select this button to blank the window and setup for entering a new note.

**Save:** Select this button to save a new note after you have entered it or to save an existing note after you have made changes to it.

**First:** Select this button to display the first note (in date order).

**Last:** Select this button to display the last note (in date order).

**Next:** Select this button to display the next note (in date order). If the last note is currently displayed, selecting this button will display the first note.

**Previous:** Select the button to display the previous note (in date order). If the first note is currently displayed, selecting this button will display the last note.

**List:** Select this button to display a list of all the notes for this student, or family, etc. You will be able to scroll through the list and select any note you are interested in viewing.

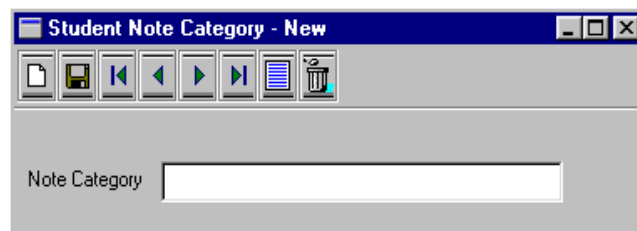
**Delete:** Select this button to delete the note that is currently displayed. You will be asked to confirm your intention to delete the note before it is actually deleted.

## Note Categories

In the previous section we described organizing your notes into note categories. Before you can put a note in a category, the category itself must be entered. The following instructions describe the process of entering note categories.

The note categories window is accessed from the same menu as it's related records. For instance, student note categories option is shown on the same menu as other "student" related records.

Selecting the "Note Categories" option on the menu displays the following window.



**Category Name:** The only information you need to enter on this window is the note category name. The name might be "Accidents" for notes relating to accidents.

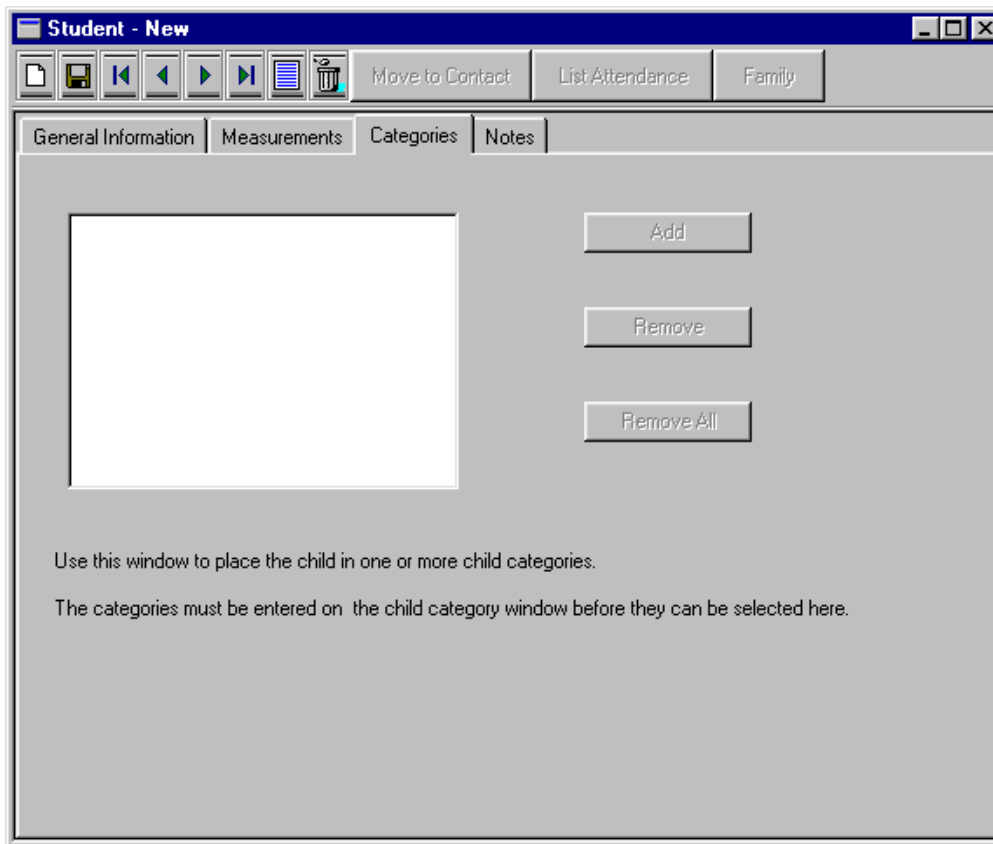
For additional information about the buttons across the top of the window, see the section "Using Buttons and the Tool Bar" in this chapter.



## Working With Categories

By using categories in DanceONE, you will have tremendous flexibility in customizing DanceONE to your business needs. You can establish an unlimited number of categories and category groups for the following types of records;

Students,  
Families,  
Child and Family Contacts/Applicants.



An example of the use of categories and category groups may help you understand how they are used. You might want to keep track of the number of siblings in each student's family. You could establish categories for "0 Siblings", "1 Sibling" and so on. As each student's record is entered into DanceONE, you could place the student in the appropriate category.

The student windows will be used in the following explanation of how to use categories. The same procedures apply to family, employee and applicant categories.

To place a student in a category start with the student window shown here. Before the student can be placed in categories, the student's record must be saved. If the student's record has been saved the student's name will be shown on the title bar at the top of the window.

With the student's record displayed on the student window, select the "Categories" tab near the top of the student window.

The student categories window will be displayed. If the student has previously been placed in one or more categories, the names of those categories will be shown.

Notice the three buttons to the right of the category list; Add, Remove and Remove All. The purpose and use of each of these buttons is explained below.

**Add:** To place the student in a category you have established select this button. When you select this button, a list of all student categories will be displayed. Highlight the category you want to use and hit the **Enter** key or double-click on the category name. The name of the category you have selected will now be displayed in the list box on the left side of the window. If the student is already in the selected category, the category name

will still only appear one time on the student's list of categories.

There are no limits to the number of categories a student may be placed in, or in the number of students that may be in any single category.

**Remove:** Use this button to remove a student from a category. First, highlight the category name in the student's category list box on the left side of the window. Then select the remove button. The highlighted category name will be removed from the student's list and the student will no longer be in that category.

## Chapter 2, Using DanceONE

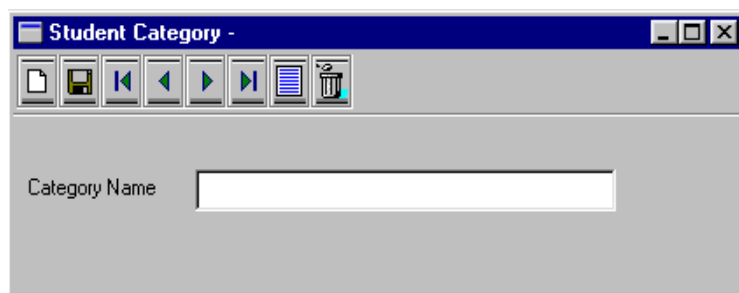
**Remove All:** Use this button to remove the student from all categories. Any categories that the student is currently in will be listed in the category list box on the left side of the window. Select the Remove All button with your mouse.

### Categories

In the previous section we described how to add students to and remove students from the different student categories you establish. In this section we will describe how to enter categories. This must be done before you will be able to place students in categories.

The category window is accessed on the same menu as the related records. For instance, in this case, on the same menu as the other student records.

Selecting the "Categories" option on the menu displays the following window.



**Category Name:** In this field enter a name for the category.

## Using Email

Before you can use the email capabilities of DanceONE you will need to specify information about your email account. This is done on the Email tab of the General Information window (see Chapter 3, General Information, Email Settings). In addition to entering the general email settings, you will need to enter email address for the families, students and instructors you wish to email. These addresses are entered on the respective family, student and instructor windows. Generally, the more email addresses you can enter into DanceONE, the more useful the email capabilities will be.

Using DanceONE, you can only send email. To receive email messages you will have to use your regular email program. DanceONE allows you to send email to an individual family, student or instructor, to send email to a selected subset of families, students or instructors or to email billing statements to families. In this section we will explain how to use the individual and group email capabilities. Sending billing statements via email is discussed in the Billing chapter of this manual.

### Individual Email

The family, student and instructor windows all have an email button on the toolbar. The family window is shown below.

The screenshot shows the 'Family - New' window. The toolbar includes buttons for Transactions, Move to Contact, and Email. The General Information tab is selected, displaying the following fields:

- Name: [ ] [ ]
- Address: [ ] [ ]
- Phone: [ ]
- City: [ ] State: [ ] Zip Code: [ ]
- Work Phones: [ ] Ext. 0 [ ] [ ] Ext. 0 [ ]
- First Names: Mother [ ] Father [ ]
- Emergency Contact: [ ] Phone: [ ]
- Email Address: [ ]

At the bottom, there is a text box containing 'No students in this family', a checkbox for 'Inactive Family', and two buttons: 'Add Child to this Family' and 'Remove Child from this Family'.

When the email button is selected, the email window is displayed with the From and To address fields already filled in. To send the email message, simply complete the subject and message fields and hit the Send button.

**File Attachments:** If you need to attach a file to your email message, select the Attach File button, locate and select the file you want to attach, then select the Send button.

The screenshot shows the 'Email' window. The fields are as follows:

- From: John Fellmeth <support@kidsonesoftware.com>
- To: jane@hotmail.com
- Subject: [ ]
- Message: [ ]

Buttons include Send, Cancel, Attach File, and Clear Attached File.

## Group Email

The Group Email option is selected from the File menu. When Group Email is selected, the following window is displayed.

would leave the Families and Students check boxes checked and select the name of the class in the class field. To select a class, type in the first few letters of the name of the class and hit Enter. Select the correct class name from the list of classes that pops up.

The screenshot shows the 'Group Email' dialog box. The 'From' field is populated with 'John Fellmeth <support@kidsonesoftware.com>'. The 'Send To' section has three checked options: 'Families', 'Students', and 'Instructors'. The 'Send to Families With' section has three checked options: 'Charge Balance', 'Credit Balance', and 'Zero Balance'. The 'Narrow your selection with the following:' section includes dropdown menus for 'Class', 'Class Category', 'Location', 'Instructor', 'Student Category', and 'Family Category'. To the right of these are checkboxes for 'Send Only to Students with Birthdays in this Date Range' (with 'First Date' and 'Last Date' fields), 'Send Only to Families with Enrolled Students', and 'Send to Inactive Families/Students'.

Using the birthday date ranges it is easy to select students to receive an email birthday notice.

**Report of Email Sent:** After the selected email messages have been sent, the report view window will display a list of all the email addresses to which the message was successfully sent. This list can be viewed or printed out.

To send a message, you should complete the Subject and Message fields, choose your selection options and select the Send button. Since many of the options on this window are self-explanatory, they are not all discussed here.

By sending a message with the default values on this window, your message will be sent to all active families, students and instructors who have an email address. As an example, this might be useful to send a reminder of an upcoming recital run-through.

The list of email recipients can be narrowed by changing the selection options. Some examples are given below.

Before charging a late charge, you may want to send a reminder email to families who haven't paid. You would un-select Students and Instructors. Un-select Credit Balance and Zero Balance and send the message.

Maybe you need to notify the members of a class about a change in the class schedule for this week. You

## Responding to Messages

When DanceONE needs to alert you about a potential problem or unexpected situation it will do so by emitting a short beep and displaying a message window. The message window will contain a short description of the problem and what may need to be done to correct it.

There will also be one or two buttons at the bottom of the message window. There will either be an Okay button or an Okay and a Cancel button. On most messages, where only the Okay button appears, simply hit **Enter** after reading the message to close the message window and return to where you left off.

If there is an Okay and a Cancel button on the messages window, selecting the Okay button tells DanceONE that you have read the warning message but want to proceed anyway with what you are doing. Selecting the cancel button tells DanceONE to cancel the operation you are doing.

## Leaving DanceONE

To exit the DanceONE program do one of the following;

- 1 - Click on the **X** in the upper right-hand corner of the main DanceONE window.
- 2 - Use the Alt-F4 key combination.
- 3 - Select the Exit option on the DanceONE File menu.



# Putting Information In

## C H A P T E R 3

### Introduction

Information about your dance business is entered into DanceONE in windows. You can open a window on your computer screen by selecting a window choice from the menu, by selecting an option from the toolbar or by using one of the hot key shortcuts discussed in the previous chapter.

This chapter shows and discusses the information windows that are available in DanceONE.

# Families

The family is the basic billing unit in DanceONE. In order to bill a student for dance instruction or any other product or service, the student must be a member of a family. There is no limit to the number of students that can be added to a family.

Adult students who are responsible for paying for their own instruction should be entered into DanceONE both as a student and as a family.

## General Information

The first family window (General Information) is shown below. For information about using the top row of buttons on the tool bar see Chapter 2 - Using Buttons and the Tool Bar.

person(s) responsible for paying the charges incurred by the students in the family.

If the students are adults, the student name and the name on this family screen will probably be the same.

**Student List:** Students in this family are listed on the bottom part of this window. To add a student to the family that is currently displayed do the following:

1 - If the family record is new and has not yet been saved, select the “Save” button on the tool bar. The family’s name should be shown on the title bar across the top of the family window.

2 - To add an existing student record to this family, click on the “Add Existing Student to this Family” button near the bottom of the window. A list of all the students that have been entered into DanceONE will be displayed. Select the student to be added to this family by highlighting the name and hitting Enter, or by double clicking on the correct name. If the student information has not been entered, select “Enter New Student for Family”. The new student window will be displayed.

3 - The selected student will now be listed as a member of this family.

Note - If a student is to be added to a family on this window, the students record should have been previously entered and saved on the student window. If the student’s information has not been entered, you can go to the student window and enter the information and link the student to his or her family on the student window.

To remove a student from the family, highlight the students name on the list of students in the family and click on the “Remove Student from this Family” button.

**Inactive Family:** Check this box if the family is inactive. Inactive families are not included in billing calculations.

When printing family reports, you will have the option to include or exclude inactive families in your report.

**Family Name:** The family name should be entered last name first followed by a comma and space then the first names. Ex. Doe, Jane and John. The name and address entered on this window should be of the



**Transactions:** This button can be used to jump directly to the transaction window with this family's transactions displayed.

**Move To Contact:** This button can be used to transfer this family's record from the active family file to the contacts and applicants file. This is typically done if the family no longer has children enrolled in any active classes but you want to maintain the family information on file for future mailings and reports.

**Email:** Use this button to bring up the email window to send an email to this family. You must have an email address entered for the family for this button to work.

### Billing/Other

The Billing/Other information window for families is shown below.

The screenshot shows the 'Family - New' window with the 'Billing/Other' tab selected. The window is divided into several sections:

- Balances:** A table with columns for 'Beginning' and 'Current' values.
 

	Beginning	Current
Tuition	0.00	0.00
Costume	0.00	0.00
Other	0.00	0.00
Total	0.00	0.00
- Alternate Billing Address:** Three empty text input fields.
- Use Alternate Billing Address:** A checkbox that is currently unchecked.
- Family Charges:** Three input fields for Tuition, Costume, and Other, each containing '0.00'. To the right of these fields is the text: 'Amounts entered in these fields, are charged to the family when you calculate and post charges, if, family billing is selected'.
- Family Charge Description:** An empty text input field.
- Family Discount Amount:** An input field containing '0.00'. Below it is the text: 'Will be credited whenever charges are calculated and posted.'
- Assess Late Charges:** A checked checkbox.
- Not Subject to Class Based Charges:** An unchecked checkbox.

**Beginning Balances** for tuition, costumes and other charges are entered on this window. Typically, the only time you would put amounts into these beginning balance fields is when you initially enter this family into DanceONE. For instance, if you were setting up

DanceONE to use in your fall session of dance instruction and a family still owed money from the last session you would enter the amounts owed as beginning balances on this window.

The current balances and total fields are automatically calculated by DanceONE and do not require an entry by you.

**Alternate Billing Address:** If you want to send the family's billing statement to an address other than the address entered on the first family window, enter the alternate address in these fields.

**Use Alternate Billing Address:** If you have entered an alternative billing address, this box must be checked if the address is to be used on the family's billing statement.

**Family Charges:** Enter amounts in these fields if you want to post charges to this family's account on a regular basis (as opposed to one time) and if the amount that should be posted is not automatically calculated and posted by a billing method other than the family charge method. For a complete discussion of different billing methods see Chapter 7, Billing.

Amounts you enter in these family charge fields will be posted to the family's account whenever you calculate and post billing transactions, if, you check the checkbox titled Family Window Charges.

As an example of using these charge fields, you may have families who are charged an amount different than you regular billing schedule. You might be using one of the other automatic billing methods for most of your families but have a few families with special circumstances that result in a charge amount different than that which would

be automatically calculated by the standard methods. In these cases, enter the family's charge amounts on this window and check the box at the bottom of the window that says "Not Subject to Class Based Charges".

**Family Charge Description:** Enter in this field the transaction description you want to use when the family charges entered in the charge fields described above are posted to the family's account. If there is not a description entered in this field when you post family window charges, a default description ("Family Charge") will be used on the posted charge transaction.

**Family Discount Amount:** Use this field to enter special discount amounts that are unique to this family. Any family discount amounts you enter on this family window will be posted to the family accounts when you check the "Family Window Discounts" checkbox on the calculate and post billing transactions window.

You might use this field in the case of a family that is entitled to an additional discount because the mother assists in costume design or the kids help as student teachers, or any other reason.

**Assess Late Charge:** This checkbox should be checked if you want to assess late charges for this family. To check (or uncheck) this box, first move to the box and then use the shift key or the **Enter** key to toggle the check mark on and off.

If you want DanceONE to automatically calculate late charges, in addition to checking this box you must complete the late charge information in the General Billing Information window.

**Not Subject to Class Based Charges:** Class based charges are those charges that are calculated and posted based on tuition, costume and other amounts entered on the class window or on amounts entered in the regular or hourly charge tables. If you will be calculating and posting charges using class based charges but, you do not wish a certain family or families to be subject to those charges, check this box.

As an example, you may have some of your own children enrolled in your program. You may want to enter you family into the program so that your children's names appear on class lists and other reports but check this box so that unnecessary charges are not calculated and posted.

Selecting the **Save** button on this window will save the family information you are working on and return you to the first family window.

## Family Direct Withdrawal

This window is displayed when you select the "Direct Withdrawal" tab on the first family window. Use this window to enter information necessary to process

direct withdrawals from the family's bank account of amounts owed to you.

You will need to work with the family to obtain their withdrawal authorization and the information required on this window. It may be a good idea to develop an authorization form for the parents to complete and sign. You can enter information for one or two bank accounts for each family.

**Direct Withdrawal Active:** Check this box if direct withdrawal is to be in effect for this family.

**Bank Account Number:** Enter the account number of the family's savings or checking account from which the withdrawal is to be made (up to 17 digits).

**Bank Transit Number:** Enter some or all of the transit number of the bank where the family's account is located. When you hit Enter the list of direct withdrawal banks you have entered will be displayed. Highlight the correct bank on the list and hit Enter again. The bank's transit number and name will be displayed. It is important that the direct withdrawal bank information be entered before this family direct withdrawal window is completed. To enter the bank

information select “General Billing Information” on the Billing menu and then “Direct Withdrawal Banks”.

**Bank Name:** The bank name will be automatically displayed from the direct withdrawal bank records you have already entered.

**Optional ID Number:** You may enter an ID number in this field to identify the family from which the withdrawal is made. Your bank may be able to suggest an appropriate number.

**Maximum Deduction:** Enter in this field the maximum amount to be withdrawn from the family’s account in each direct withdrawal transmittal. If an amount is not entered in this field then the current balance or amount charged on the family’s account determines the amount of the withdrawal.

**Type of Account:** Indicate checking or savings account for each account entered.

**Pre-notification:** Check here if you want this direct withdrawal to be processed as a pre-notification in the next direct withdrawal transmittal.

## Students

Student information is entered on the student window. After student information is entered, the student can be put in a family on the family window or enrolled, pre-registered or put on a class waiting list in the class windows. If the family information has already been entered, the student can be placed in a family on this window. Likewise, if the class information has been

of all the families you have entered will be displayed. Highlight this student's family and hit **Enter** or double click on the family name. The name of the family will now be displayed in the family field.

You should enter the **student's birth date** if at all possible. The birth date is used to determine whether the student fits the age range specified for classes the student is enrolled in. You will get a warning message on the enrollment screen if the student's age is outside the age range specified for the class.

**Student Discount Amount:** Use this field to enter special discount amounts that are unique to this student. Any student discount amounts you enter on this student window will be posted to the family accounts when you check the "Student Window Discounts" checkbox on the calculate and post billing transactions window.

You might use this field in the case of a student that is entitled to an additional discount because of help as a student teacher or for any other reason.

**Class Enrollment Date:** The class enrollment date will always show the current date. Before enrolling this student in a class you can optionally

entered into DanceONE, the student can be enrolled in any classes from this window.

change the enrollment date to the date that the student actually enrolled. DanceONE does not currently utilize the enrollment date for any purpose.

### General Information

The student general information window is shown above.

**Student Name:** The student name should be entered last name first followed by a comma and space then the first and middle name.

The **class list** on the student screen lists the classes the student is currently enrolled in. You can enroll or remove students from classes when you are in the class list box. To enroll the student in a class do the following: 1) make sure the student record has been saved, 2) click on the "Enroll in Class" button, 3) select the correct class from the class list that is displayed. The class will be shown in the class list box on the student window.

The **family name** on the student window is displayed if the student has been added to a family. To specify the family on this student window, you must select the family from the family list window. The family list window is displayed any time you change the information in the family field and then hit **Enter** or **Tab**. For example, if the family field is blank and you want to specify the student's family, type in the first letter or two of the family name and hit **Enter**. A list

In order to place students in class on this student window, the class records should have been entered and saved on the class window.

To remove a student from a class do the following: 1) highlight the class name in the "Classes" list (you can use the arrow keys or click with the mouse), 2) click on

the remove from class button. The class will be removed from the list of classes taken by this student.

**Inactive Student:** Check this box if the student is inactive. Inactive students are not included in billing calculations. When printing student reports, you will have the option to include or exclude inactive students in your report.

**Move to Contact:** This button can be used to transfer this student's record from the active student file into the contacts and applicants file. In this way, the records of former or inactive students can be kept on file for future mailings and reporting.

**List Attendance Button:** Select this button to display a list of the student's attendance records.

**Family Button:** Selecting this button will display the family window with the student's family information displayed.

**Email:** Use this button to bring up the email window to send an email to this student. You must have an email address entered for the student for this button to work.

## Student Measurements

When you select the "Measurements" tab on the student window, the following is displayed.

The screenshot shows a software window titled "Student - New". At the top, there is a toolbar with several icons and three buttons: "Move to Contact", "List Attendance", and "Family". Below the toolbar are four tabs: "General Information", "Measurements", "Categories", and "Notes". The "Measurements" tab is selected and active. The main area of the window contains a form titled "Student Measurements:" with the following fields and values:

Bust	0.0	Inseam	0.0	Skirt Length	0.0
Waist	0.0	Girth	0.0	Size	
Hips	0.0	Back (to Waist)	0.0		

**Student measurements** should be entered as inches and tenths. For example 27.5 for 27 and ½ inches. Student measurements can be used by DanceONE to automatically size costumes and prepare costume ordering information. See the Costume and Size Chart sections in this chapter.

**Email Address:** Enter the student's email address.

## Classes

Information about your classes is entered on five class windows. The first window contains general information about the class; the name of the class, who teaches it, when and where it is held, who should be enrolled, etc. The second window contains information about the cost of the class. The third window is the enrollment window. It shows who is currently enrolled and allows you enroll or remove students. The fourth window is the waiting list window. It shows who is currently on the waiting list for the class and allows you to add or remove students on the list. The fifth window is the pre-registration window. Use this window to pre-register students in the class.

### General Information

The first class window is shown below.

The **class name** can be up to 30 characters long. Although DanceONE will permit you to enter more than one class with exactly the same name, we recommend that you differentiate (if only slightly) the names you use for your classes. A warning message will be displayed if you enter a class name exactly like one already in the computer.

**Location:** Use of the location field is optional. If you plan to assign classes to locations you must first enter the locations you plan to use in the location window. To specify a location on the class window, you must select the location from the location list window. The location list window is displayed any time you change the information in the location field and then hit **Enter** or **Tab**. For example, if the location field is blank and you want to specify a location for the class, type in the first letter or two of the location name and hit **Enter**. A list of all the locations you have entered will be displayed. Highlight the location that this class should be assigned to and hit **Enter** or double click on the location name. The name of the location will now be displayed in the location field.

To change the location shown in the location field simply type part or all of the new location name in the field and select the new location from the list as described above.

**Instructor:** An instructor for a class is selected the same way that a location is selected as described above. Like a location, instructor information must be entered in the instructor window before the instructor can be assigned to a class. Assigning instructors to classes is optional in DanceONE.

To select an instructor for the class, move to the instructor name field on the class window, then follow the instructions above for selecting a location.

**Class Times:** Enter the beginning and ending times that the class is scheduled each week. DanceONE allows a great deal of flexibility when it comes to entering the times. To indicate AM or PM you should enter an **A** or a **P** (either

upper or lower case is fine) along with the time. The hours and minutes of the time can be separated by either a comma, a period or a colon. If you don't enter **A** or **P** to indicate AM or PM, DanceONE assumes military time.

For example, the following entries will all be interpreted as 10:15 in the morning: **a10.15 10:15 AM 10,15.**

The following entries will be interpreted as 6:45 in the evening: p6,45 18:45.

**Class Gender:** Use these buttons to indicate the gender of the students to be enrolled in this class. Your choices are female, male or both. If you attempt to enroll a student in a class who does not match the specified gender you will be given a warning message, but will be able to enroll the student.

**Age Range:** Enter here the age of the youngest and oldest students that should be enrolled in this class. If you attempt to enroll a student outside this range DanceONE will display a warning message but will permit the student to be enrolled.

**Maximum Enrollment:** Enter here the maximum number of students that should be enrolled in this class. If you attempt to enroll more than this number, DanceONE will display a warning message but will permit the enrollment.

**Category:** Use categories to group you classes in logical groups of your choosing. The category you enter on this class window must already have been enter into DanceONE on the Course Categories window. This is an optional field.

**Costume:** You may optionally attach costumes to the class on this class window. Before a costume can be added to a class, the costume record needs to be entered and saved on the costume window. To add a costume to the class, double-click in the costume box. A list of available costumes will be displayed from which you can choose the costume to add to the class. Any number of costumes/accessories can be added to each class. Adding costumes to the classes is a necessary step in preparing to DanceONE to automatically size and prepare order information for costumes. In addition you will need to enter measurements and/or sizes on the student window as well as entering costume and size chart information.

To delete a costume from a class, highlight the name of the costume in the costume box and hit the delete key on the keyboard.

## Billing Information

The billing information tab of the class window is shown here.

The screenshot shows the 'Classes - New' window with the 'Billing Information' tab selected. The window contains the following fields and controls:

- Tuition Amount: 0.00
- Costume Amount: 0.00
- Other Amount: 0.00
- Billing Method: Use Billing Parameters Default (dropdown menu)
- Student Discount Plan: (empty text box)
- Family Discount Plan: (empty text box)
- Don't Automatically Calculate Charges: (unchecked checkbox)

**Amounts:** The tuition, costume and other amounts you enter on this window will be used in automatically calculating and posting charges for the students currently enrolled in this class. Exactly how and when these charges will be posted to the family accounts is determined by the billing method or methods you select and by when you run the "Calculate and Post Billing Transactions" option on the billing menu. For a complete discussion of the different billing methods see Chapter 7, Billing.

**Billing Method:** You can select different billing methods for different classes and/or you can select a default billing method on the Billing Parameters window. You can use the default billing method for most of your classes but have some classes use different methods. The following options are available to you on the Billing Method combo-box:

- Use the Billing Parameters Default
- Period Based Billing
- Charge Based on Classes Held
- Charge Based on Classes Attended
- Use the Charge Table

Use the Hourly Charge Table

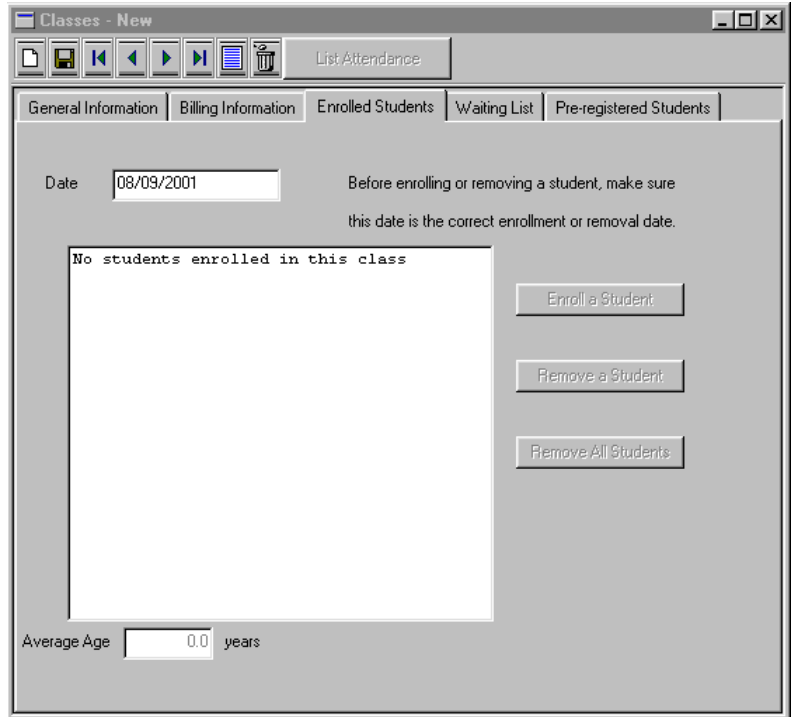
**Family Discount:** If a family discount plan is available for this class, enter the name of the plan in the family discount field. The name must be the name of a discount plan already entered. (see the Family Discount Plan section of this chapter)

**Don't Automatically Calculate Charges:** Check this box if you do not want charges calculated and posted for students enrolled in this class when the billing option to calculate and post charges is run.

## Class Enrollment Window

The enrolled students tab on the class window is shown below.

Use this window to enroll students in the class.



Shown at the top of the window is the name of the class, maximum enrollment, number of currently enrolled students and number of students on the waiting list.

To **enroll** a student do the following:

Enter the enrollment date in the date field.

Click on the “Enroll a Student” button. The list of students will be displayed. Locate and select the name of the student to be enrolled in the class. When the student list is displayed you can navigate to a particular student by starting to type the student’s name. As you type, the list will automatically move closer to the name you are typing. You can select the student name by highlighting it and hitting Enter or by simply double clicking on the name.

The students name will now be shown on the list of enrolled students.



When you are enrolling students in the class you will receive warning messages if the maximum enrollment for the class is being exceeded or if the student is the wrong gender or age for the class. These messages are just warnings and you can go ahead and enroll the student if you want.

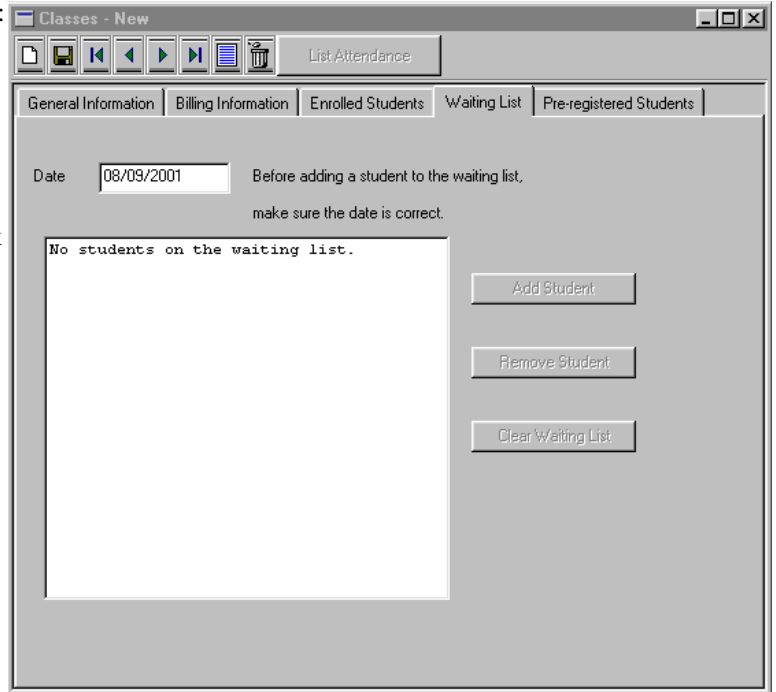
To **remove** a student from the class do the following:

Highlight the student's name on the class list and then click on the "Remove a Student" button. The student's name will be removed from the list of students enrolled in this class.

To remove all enrolled students from this class, click on the "Remove All Students" button.

## Class Waiting List Window

The class waiting list window is shown below.

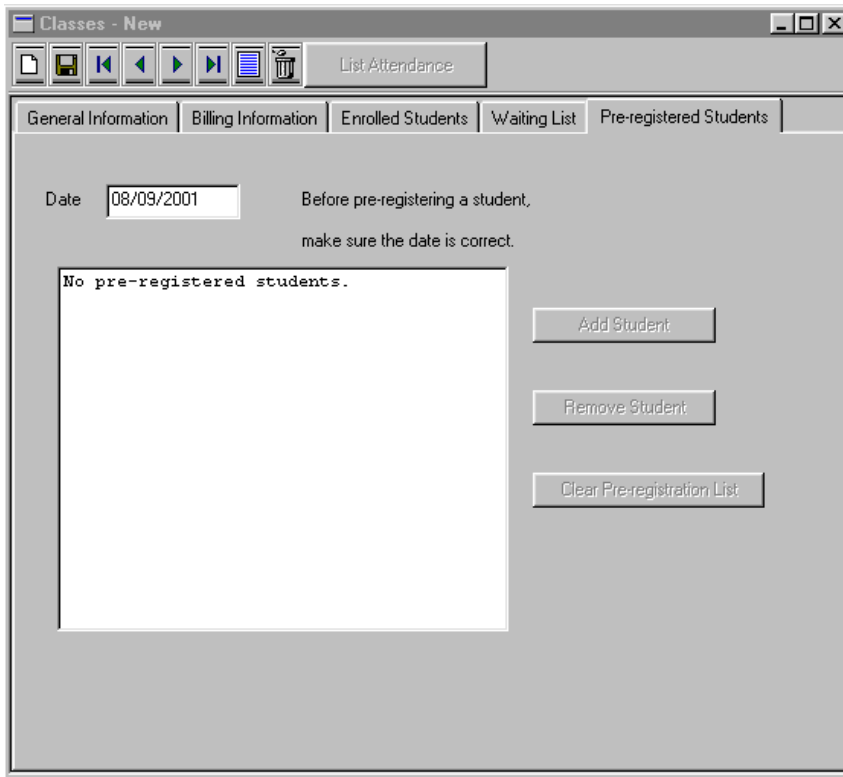


Use this window to place students on the waiting list for the class. Adding and removing students from the waiting list on this window works the same way as adding and removing enrolled students. See the previous section for more information on adding and removing students from the list.

## Class Pre-Registration Window

Use this window to pre-register students for the class. Typically you would use this window if you are registering students for next session while the current session is still in progress. After pre-registration is complete, you can use an option on the processes menu to transfer pre-registered students to enrolled status. If is possible it is usually easier and more straight-forward to enroll students directly in classes for the new session once the prior session is completed.

The steps for adding and removing students from the pre-registration list are the same as the steps for adding and removing students from lists on the previous two windows.



## Family Discount

Family discount plans are established in DanceONE when you want to offer a discount to families with more than one student currently enrolled in a class. The discount can be based on a percentage or dollars and cents reduction in the regular charge for a class. You can setup as many discounts plans as you like and a different plan (or no plan) can be associated with each class. Shown here is the family discount window.

The **discount plan name** is a short name given to the plan to identify it. It should be no longer than 10 characters. It is this name that is entered on the class window to associate the discount plan with the class.

Select either the Dollar or Percent radio buttons to indicate the **type of discount**. When entering percentages, keep in mind that 100% would be as 1.00. So, 25% would be entered as .25, etc.

Check the appropriate boxes in the **discount applies to** group to indicate whether the discount applies to tuition charges and/or costume charges and/or other charges. Any or all of these boxes may be checked.

Obviously, if none of the boxes are checked the discount plan will have no effect.

If you are setting up a **dollar based** discount plan, enter into the field next to the number of family members the dollars and cents amount of the discount. See the section below on the Apply Discount group for an explanation of how the discount will be applied.

If you are setting up a **percentage based** discount plan, enter into the field next to the number of family members, the percent of discount that will be applied to the family's charges.

Remember, after you have entered the family discount plans into DanceONE you will need to enter the discount plan names in the class window for any classes you want the discount to apply to.

The **Discount Based On** checkbox allows you to specify whether the discount is based on the number of students in the family or the total number of classes taken by family members. In either case, the count is based on students enrolled in classes that are currently being taught. All classes that family members are enrolled in are counted towards the total, even if some of the classes are not subject to this discount plan.

**Apply Discount:** Indicate here whether the discount applies to each charge posted in the billing process or whether the discount amount should be posted a single time each time the billing process is run.

As an example, assume a family in which the students are currently taking a total of 5 classes. In the Discount Based On box you have indicated that the discount should be based on the number of classes taken by the family. And you have indicate that the dollar amount of the discount for 5 classes is \$10.00.

If in the Apply Discount box you indicate that the discount should apply to each posted charge then the charge for each of the 5 classes taken by students in

this family will be discounted \$10.00 for a total discount of \$50.00.

If in the Apply Discount box you indicate that the discount should be applied once in each billing cycle then a single discount of \$10.00 will be posted.

If you have chosen a percentage discount, then your choice in the Apply Discount group will not make any difference. This is because the amount of a percentage discount will be the same whether it is applied to each posted charge or to the total posted charges.

**Calculate Discount Based On:** If you select “**Single Discount Amount or Percent**”, a single discount amount will be credited to the family’s account based on the number of students in the family or classes taken by students in the family. For example, let’s assume you set up a discount plan with a \$5 discount for the second class and a \$10 discount for the third class. If the students in a family are taking three classes then a single \$10 discount will be credited to their family’s account.

If you select “**Separate Discounts Starting with Highest Charge**”, the discount amounts at each level of the discount table will be credited to the family’s account. Let’s assume a 5% discount for the two classes and a 10% discount for three. Once again the students in the family are enrolled in three classes. The tuition for the three classes is \$50, \$40 and \$30. In this case the highest tuition class will not be discounted, the \$40 class will be discounted 5% and the \$30 class will be discounted 10%. Remember, if you choose this option, charges for each class or student will be sorted for highest to lowest and the discount amounts or percents will be applied in order.

**Notes:** Discount plans will not be used for charges calculated from the regular or hourly charge tables since discounts should already be built into your charge table.

Also, since discount plans are tied to classes, they will not be used when the charges entered on the family window are posted.

## Student Discount

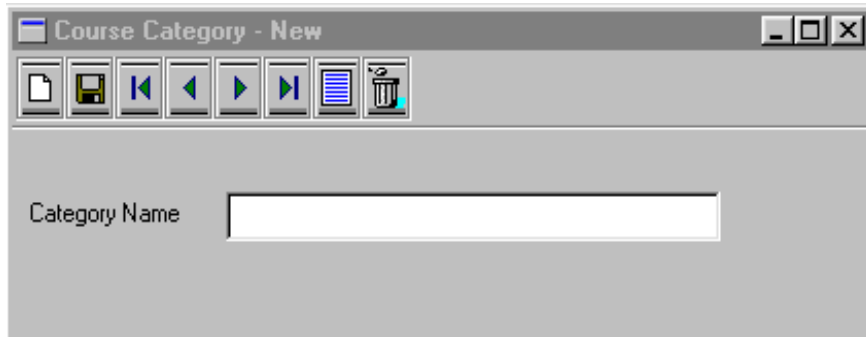
Student discount plans in DanceONE allow you to implement discount plans that are based on the number of classes taken by each individual student. Both a family discount plan and a student discount plan can be specified for a class. For additional information on how discount plans work, see the previous section on family discount plans. The student discount plan window is shown below.

Number of classes enrolled in.	Percent or Dollar Discount
2	0.00
3	0.00
4	0.00
5	0.00
6	0.00
7	0.00
8	0.00
9	0.00
10+	0.00

## Class Categories

---

Use this window to describe class categories into which you want to group your classes. An example might be "team" and "non-team". You can enter as many categories as you want. The categories that you set up on this window will then need to be entered on the first class window for each class you are placing in a group. Using class categories is optional in DanceONE.



# Transactions

Use the transaction window to add new billing transactions or modify existing transactions. In DanceONE, all transactions are posted to family accounts. There are four major categories of transactions; charges, payments, credits and late charges. When charges or late charges are posted to a family's account the family's account balance (the amount they owe you) increases. When payments or credits are posted to the family's account their balance due is reduced. By using transaction categories you have virtually unlimited flexibility in segregating and reporting on your billing transactions in ways that are useful to you.

Shown below is the transaction window.

The buttons on the tool bar perform different functions depending on whether you are 1) selecting a family whose account you want to work with, or 2) working with the transactions posted to the account of a family you have chosen.

If you are choosing a family's account to work with, the First, Last, Next, Previous and List buttons will help you locate the family you are looking for. For example, the First button will select the first family, the List button will display the list of families, etc.

If you have selected a family to work with, the same buttons will help you locate the specific transaction you want to work with. In other words, selecting the "First" button will display the first transaction posted to the family's account. Selecting the "New" button will clear the window in preparation for entering a new transaction to be posted to the selected family's account. The New, Save and Delete buttons are not selectable until after you have selected a family account to work with.

**Delete All for this Family:** Selecting this button will allow you to delete all transactions for the family you have selected. Be careful when selecting this option. If you are using DanceONE to print financial reports showing income, deleting all the transactions for a family may distort these reports, especially if there are payment transactions entered for the family.

**Use Student Name, Use Family Name:** Use these buttons to indicate whether you want to select the family to post transactions to by using the family name list or the student name list. Even though the transactions will be posted to families, it is often useful to select the family by using the student's name. As an example, you may have a cash payment with a note attached to it giving the student's name.

You may switch between using the family and student names at

any time.

**Duplicate:** Use this button to duplicate in the transaction fields the information from the last transaction you saved. This can be useful when posting a number of transactions where the date,

reference, description, type and amounts are entirely or mostly the same. Selecting the Duplicate button will fill in the fields with the information from the last transaction and you can make any necessary changes before saving the transaction. This can also be useful when entering a payment where you want to separate the Other amount into more than one category.

**Transaction History File** - you can use buttons on the transaction window to send the families transactions to or retrieve transactions from the transaction history file. Transactions in the history file are still viewable but they will not show up in the family's active account. When transactions are sent to the history file the family's beginning balances will be adjusted so that the current balance will remain the same.

**Family Name:** All billing transactions in DanceONE must be linked to a family. Hitting **Enter** in this field will display a selection list of family names from which you can choose a family. Typing the first few letters of the family name will pre-position the selection list on or near the family you want.

**Date:** Specify the transaction date. The date also determines the order that transactions appear on reports and selection lists.

**Reference:** This field is typically used for a document reference for the transaction you are entering. For example, the reference for a payment might be the check number or the word "cash". It is okay to leave the field blank.

**Description:** Use these fields to describe the transaction. For a payment the description might be the name of the payer.

**Type of Transaction:** Select the button for the appropriate type of transaction.

**Amounts:** You can enter an amount in any or all of the three amounts fields. A payment, for example, could be split three ways in a single transaction.

**Transaction Categories:** Through the use of transaction categories, DanceONE permits you to subdivide your transactions beyond the general tuition, costume and other categories. For example, charges and payments in the other category may be for recital or competition fees, for music or supply sales, for annual registration fees or a variety of

other categories. By setting up transaction categories for each of these items and then specifying the appropriate transaction category number when an amount is entered in the other field, you will be able to print reports summarizing your charges and payments by category.

Before selecting a transaction category in the transaction window you should enter your category numbers and descriptions in the transaction category window (see the following section of this chapter). Once the category is setup simply enter the category number in the category field on the transaction window. After you enter the category number and hit **Enter** the category description will automatically be displayed.

In many cases, the best approach for using transaction categories would be to use categories only for payment transactions. If you do this you will be able to print reports showing the amount you have received in any of your transaction categories during any period of time you specify. For example, you might want to keep track of the amount you receive each year for registration fees. If you setup a Registration Fee category and then enter the category number when entering payments for registration fees, you will be able to print reports covering any period you select summarizing these payments.

**Family Balances:** When you select Save (**Alt-S**) from the tool bar the current transaction is saved and the family balances at the bottom right of the screen will be updated.

**Printing Receipts:** DanceONE will automatically print receipts when payment transactions are entered if you instruct it to do so. For instructions on how to select this option see the section in this chapter titled "Printing Options". If the option to print receipts is selected, when you save a payment transaction a window will be displayed asking for confirmation that you want a receipt printed for the payment you are saving. If you select **Yes** from this window the receipt will be immediately printed. Selecting **Cancel** will bypass the receipt printing.

**Choose New Family Button:** After you have finished working with one family's account you can select this button to return to the top of the window and select a new family to work with.

## Transaction Spreadsheet

The transaction spreadsheet window is displayed when you select Transaction Spreadsheet from the Data Entry menu or when you click on the List Transactions button on either the student or family window.

Beginning Balance		Charges (1)		Payments (1)		Credits (0)		Current Balance	
0.00		47.50		(45.00)		0.00		2.50	
Separate Balances:		Tuition		Costume		Other			
		2.50		0.00		0.00			
(*) Date	Reference	Description (1)	Description (2)	Tuition	Catg	Costume	Catg	Other	
P 08/27/2004	Ck.# 1234	Doe Payment		(45.00)	0	0.00	0	0	
C 09/01/2004	Charge	September Tuition		47.50	0	0.00	0	0	

(\*) - Transaction Type is "P" for payment, "C" for charge, "R" for credit and "L" for late charge.

payment, C for charge, R for credit and L for late charge.

**Delete an Existing Transaction:** To delete an existing transaction, first highlight the row containing the transaction information. Click on the Delete button (or Alt-D) and then confirm you want to delete the selected transaction.

**Choose a Different Family:** Select this button to see a list of families from which you can select a new family to work with.

## Transaction Categories

For an explanation of the purpose of transaction categories, see the preceding section on transactions.

The only information necessary to establish a transaction category is the category number between 1 and 999 and a category description. The category number is the

Using this window you can view, change, add or delete charges, payments and other transactions in a family's account.

Near the top of the window a summary of the family's account is displayed showing beginning balance, total charges, payments, credits and the current balance.

**Changing Information:** To change information on this window;

Move to the row and column you want to change by using the cursor control keys (Page-Up, Page-Down, up, down, right, left arrows, etc) or by using your mouse.

Type in the correct information and hit Enter. You do not need to click on a Save button, but be careful. As soon as you make your change it will be saved.

**Add a New Transaction:** To add a new transaction click on the Add button on the toolbar or use Alt-A. A blank transaction will be added to the spreadsheet. You should enter the correct values for type, date, reference, description, amount, etc. For the first column, transaction type, use the following; P for

Transaction Category - New

Category Number: 0 (Between 1 and 999.)

Description: [Empty Field]

number that will be entered in the transaction window to select a category.



## Quick Transactions

The quick transaction windows will either use the family name or account number to select a family.

The screenshot shows a software window titled "Quick Transaction". At the top left, there are navigation buttons (back, forward, list) and a "List Transactions" button. The main area is divided into several sections:

- Family Name:** A text input field.
- Date:** A date input field containing "09/22/2006".
- Reference:** A text input field.
- Description:** A text input field.
- Transaction Type:** A group box containing four radio buttons: "Payment" (selected), "Charge", "Credit", and "Late Charge".
- Family Account Summary:** A table with the following data:
 

Beginning Balance	0.00
Charges	0.00
Payments	0.00
Credits	0.00
Current Balance	0.00
- Amount Fields:** Three rows for "Tuition", "Costume", and "Other". Each row has two input fields: one for the amount (all set to "0.00") and one for a unit (all set to "0").
- Save:** A button at the bottom center.

**Family Name:** As soon as you have typed enough of the family name to have the correct family displayed, hit Enter to select the family's account.

Enter date, reference, description and amount information.

**Save:** Hit Enter or click on the Save button to post the transaction to the selected family. After saving the transaction, the date, reference, description and amount information remain the same making it easy to post similar transactions to a number of family accounts.

## Locations

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The information in the location window describes the different locations where classes are taught. There is no limit to the number of locations you can enter into DanceONE. After locations are entered in the location window, a location can be specified for each class in the class window.

The screenshot shows a window titled "Location - New" with a standard toolbar. The form contains the following fields:

- Location/Studio
- Name:
- Address:
- City:  State:  Zip:
- Phone:

It is not necessary that locations be entered into DanceONE. If your dance business operates from a single location, you will probably not find it useful to enter that location and then specify the location for all your classes. Locations are primarily a tool to help you keep track of classes and students being taught in multiple locations.

See the instructions for the location field on the class window for information on specifying a location for a class.

# Instructors

See the instructions for the instructor name field on the class window for information on assigning an instructor to a class.

Use the instructor window to enter information about your instructors into DanceONE. There is no limit to the number of instructors that can be entered. After the instructor information is entered and saved in the instructor window, an instructor can be

The screenshot shows a window titled "Instructor - New" with a toolbar containing icons for file operations and an "Email" button. The main area is labeled "Instructor:" and contains the following fields:

- Name: [Text Field]
- Home Phone: [Text Field]
- Work Phone: [Text Field]
- Cell Phone: [Text Field]
- Address: [Text Field]
- City: [Text Field]
- State: [Text Field]
- Zip Code: [Text Field]
- Social Security #: [Text Field]
- Date of Birth: [Text Field]
- Hire Date: [Text Field]
- Pay Rate: [Text Field] (value: 0.00)
- Availability: Please enter 'A' for AM, 'P' for PM or 'D' for all day. [Su] [Mo] [Tu] [We] [Th] [Fr] [Sa] (checkboxes)
- Spouse Name: [Text Field]
- Phone: [Text Field]
- Emergency Contact Name: [Text Field]
- Phone: [Text Field]
- Email Address: [Text Field]

specified for each class in the class window.

Like locations, it is not necessary that instructor information be entered into DanceONE. If your business only has a few instructors it may not be useful to you to enter instructor information and specify which instructor is teaching which class. If you do set up instructors in DanceONE, you will be able to print class, student and student birthday lists for each instructor.

With the exception of the instructor's name, all the information on the instructor window is optional.

In the **availability** fields enter a single letter; "a", "p" or "d" for A.M., P.M. or all day availability respectively.

## Family Contacts/Applicants

Use these windows to record information about family contacts or applicants. Entering these records is optional in DanceONE. Use these windows if you have a need to keep track of families and/or students separately from the enrolled or active families and students. Family records can also be moved easily between this contact/applicant file and the active family file (see the section below describing the Move to Active button).

The family contact/applicant files are also useful for maintaining special purpose mailing lists that are different from the mailings you do from your active family file. For example, if you conduct a summer workshop and need to maintain a mailing list of past or potential participants, you could establish a family contact/applicant category for the workshop, enter the names and addresses and do mailings whenever needed.

This family contact/applicant window is similar to the regular active family window. For an explanation of the information available on this window see the section in this chapter dealing with families.

For a further explanation of the Categories and Notes tabs, see the sections in Chapter 2 titled “Working with Categories” and “Working with Notes”.

**Move to Active:** Select this button to move the family contact information to the regular family file. After the information is moved you will be asked if you would like to delete this family contact record. If you select “Yes”, the family information will be deleted from the family contact file and remain in the family file. If you select “No”, the family information will be in both the regular family file and the family contact file.

The screenshot shows a software window titled "Family Contact - New". At the top, there is a toolbar with several icons (file, save, back, forward, print, trash) and a button labeled "Move to Active". Below the toolbar are three tabs: "Basic Information", "Categories", and "Notes". The "Basic Information" tab is selected and contains the following fields:

- Parents or Guardians:**
  - Name: [text box]
  - Address: [text box]
  - Home Phone: [text box]
  - Mom's First Name: [text box]
  - Work Phone: [text box] 0
  - Dad's First Name: [text box]
  - Work Phone: [text box] 0
  - City: [text box]
  - State: [text box]
  - Zip: [text box]
- Emergency Contact:**
  - Emergency Contact: [text box]
  - Emergency Phone: [text box]
- Children in Family:**
  - No Children in this Family: [text box]
  - Add Child to Family: [button]
  - Remove Child from Family: [button]

## Student Contacts/Applicants

Use these windows to record information about student contacts or applicants. Entering these records is optional in DanceONE. Use these windows if you have a need to keep track of students separate from your enrolled or active students. Student records can be moved easily between this contact/applicant file and the active student file (see the section below describing the Move to Active button).

The student contact/applicant files are useful for maintaining special purpose mailing lists that are different from the mailings you do from your active student file.

The student contact/applicant window is similar to the regular student window. For an explanation of the information available on this window, see the section in this chapter that deals with students.

**Move to Active:** Select this button if you want to move the student contact record to the active student file. After the student record is moved, you will be asked if you would like to delete it from the student contact file.

**Categories and Notes:** For more information on working with categories and notes see Chapter 2.

**Student Contact - New**

Family Move to Active

Basic Information Categories Notes

Name  Age  Years

Family  Months

Birthdate  Application Date

Gender

Female

Male

## Attendance

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Use this window to record student attendance in classes. Attendance recording is optional in DanceONE unless you will be using the billing method that charges by the class attended (see the Billing chapter for a discussion of billing methods).

**Save:** Selecting Save (**Alt-S**) from the tool bar will save the attendance records you have entered and put you back in the date field.

**New:** Selecting the New option (**Alt-N**) from the tool bar will clear the class and student information from the window without saving the attendance information.

The screenshot shows a window titled "Attendance" with a blue title bar. Below the title bar is a toolbar with two buttons: "New" and "Save". The main area of the window is light gray and contains the following elements:

- A "Date" label followed by a text input field containing "05/25/2001".
- A "Class" label followed by an empty text input field.
- A label "Currently Enrolled Students" above a large, empty rectangular area intended for a list of students.

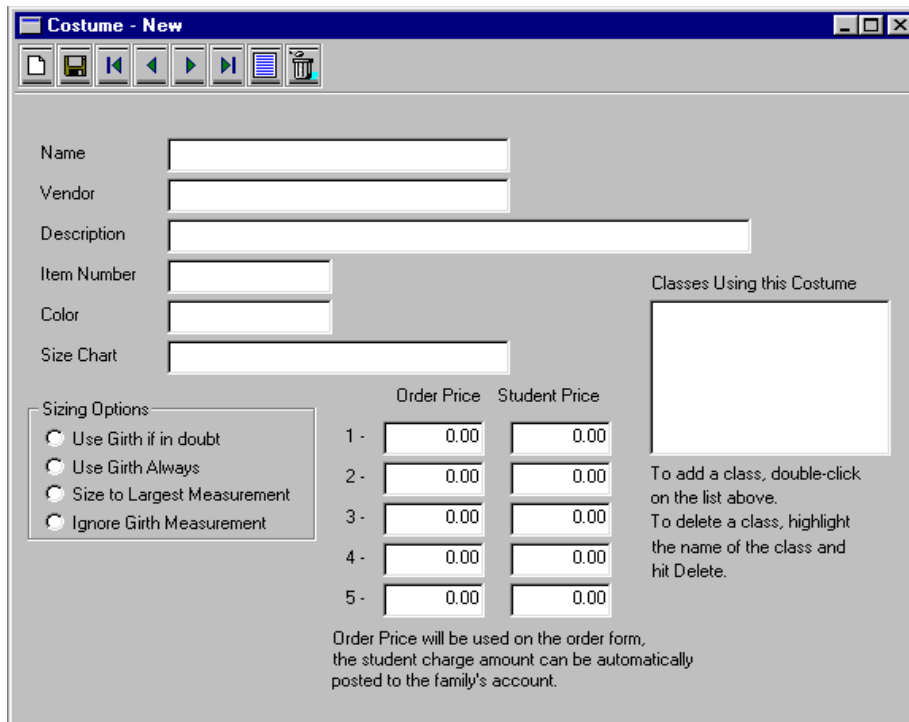
**Date:** Enter the date the class is held.

**Class:** Hitting the **Enter** key in the class field will display a selection list of classes for you to choose from. Type the first few characters of the class name to pre-position the selection list on or near the class you want.

**Student List:** After you select a class, the student list will contain the names of the students currently enrolled in the class. Each name will have a check box by the name. To mark the student in attendance, either click on the checkbox or do the following. Move the highlight bar to the student's name with the up and down arrow keys. When the name is highlighted you can use the space bar or the **Enter** key to toggle the check mark in the check box.

## Costumes

DanceONE's costume features can help ease the burden of costume sizing and ordering. After costume information is entered on the costume window, the name of the costume should be entered in the class window of the classes that will be using the costume. If you want DanceONE to select costume sizes for the students enrolled in these classes, be sure to setup a size chart and indicate the size chart name on this costume window (see the next section in this chapter for information about size charts).



**Costume - New**

Name: \_\_\_\_\_

Vendor: \_\_\_\_\_

Description: \_\_\_\_\_

Item Number: \_\_\_\_\_

Color: \_\_\_\_\_

Size Chart: \_\_\_\_\_

**Sizing Options:**

Use Girth if in doubt

Use Girth Always

Size to Largest Measurement

Ignore Girth Measurement

	Order Price	Student Price
1 -	0.00	0.00
2 -	0.00	0.00
3 -	0.00	0.00
4 -	0.00	0.00
5 -	0.00	0.00

Order Price will be used on the order form, the student charge amount can be automatically posted to the family's account.

**Classes Using this Costume**

To add a class, double-click on the list above.  
To delete a class, highlight the name of the class and hit Delete.

After costume and size chart records are entered into DanceONE, and student measurements entered in the student window, you will be able to display or print the costume sizing and ordering report from the reports menu.

**Name:** The costume name is a unique name assigned to the costume record and used to identify it in the class window.

**Vendor:** The costume vendor.

**Description, Item Number and Color** are typically needed to complete the costume order and are found in the vendor's costume catalog.

**Size Chart:** If you want DanceONE to calculate sizes for students using this costume, the size chart information will need to be entered in the size chart window (see next section) and the size chart name specified in this field on the costume window. To select a size chart on the costume window, the name of the size chart must be selected from the size chart list window. The size chart list window is displayed any time you change the information in the size chart field and hit **Enter** or **Tab**. For example, if the size chart field is blank and you want to specify a size chart for the costume, type in the first letter or two of the size chart name and hit **Enter**. A list of all the size charts you have entered will be displayed. Highlight the size chart name you want to select for this costume and hit **Enter** or double click on the size chart name. The name of the size chart will now be displayed in the size chart field.

**Sizing Options:** DanceONE provides three different methods for automatically sizing costumes. There are described below.

1-The default method is to used the girth measurement if in doubt. This means that if a size in the size chart can be found that matches the students bust, waist, hips and girth measurements that size will be selected. If the students measurements do not fit a

single line in the size chart, the girth measurement will be used, by itself, to select a size.

2-The second method is simply to select a size based on the student's girth measurement. The other measurements are ignored when this method is used.

3-The third option is to select the size based on the largest measurement. When this method is used, the size selected will be the smallest size that has measurement ranges specified for bust, waist, hips and girth that are greater than or equal to the students measurements. In other words, a size that makes sure that no measurement is less than the students measurement.

**Classes:** To add this costume to a class, double-click in the classes box. A list of classes will be displayed from which you can choose the class or classes that will be used this costume. To delete a class from the list of classes using the costume, highlight the name of the class in the classes box and hit the delete key on the keyboard.

**Order Price:** Up to five different prices can be entered for different costume size categories. These prices are the vendor's order prices that will be used to prepare the costume order. The category number, 1 - 5, is entered on the size chart to indicate which category each size is part of. Typically these categories are "child" and "adult" and are used to indicate child and adult sizes on the size chart when the child and adult costumes are priced differently. See the following section dealing with size charts for more information about the use of these category numbers.

**Student Charge:** Amounts entered in these fields can be automatically charge to student's accounts when the costume order is prepared. They can be the same or different than the vendor's order prices described above. See the section on costume ordering in the Reports chapter for more information.

## Size Charts

If you will be using DanceONE to help automate the costume sizing and ordering process, you should enter a size chart for each costume vendor you will be ordering from.

**Size Chart Name:** Each size chart you enter should be given a unique name. This name could be the name of the costume vendor. This name will be used to identify this size chart on the costume window for any costumes that will be sized with this chart.

**Size:** The size to be used when ordering. For instance, "small", "medium", "ch sm", etc. Be sure that the size lines are entered on the size chart in

Size	Bust		Waist		Hips		Girth		Inseam		1 - 5
	From	To	From	To	From	To	From	To	From	To	
	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0

order, from smallest size to largest size. Up to 12 size lines are available on a size chart.

**Measurements:** Bust, waist, hips and girth measurements are used by DanceONE to automatically select sizes based on the sizing method selected in the costume window. At the present time, inseam sizes are not used when sizing is done.

For best results in sizing, the lines on the size chart should cover the range of possible measurements with no gaps or overlaps. For example, the first line bust measurement range might be 17 to 20, the second line 21 to 23, the third line 24 to 26, etc. If the range overlaps (17 to 20 on the first line and 20 to 23 on the second), DanceONE may have a difficult time assigning accurate sizes. The same problem will exist if there are gaps in the size ranges, i.e., 17 to 20 on the first line and 22 to 26 on the second.



# Music

Using the music window you can catalog and organize your music collection. Using the music search window (discussed on the next page) you can easily and flexibly search your music record to find the music you are interested in.

The screenshot shows a window titled "Music - New" with a toolbar containing icons for file operations and a "Duplicate" button. The main area contains several input fields:

- Title
- Artist
- Album Name
- Description
- Type of Music
- Date Purchased
- Dance Category
- Date Last Used
- Type of Media
- Side
- Location
- Track
- Condition
- Counter
- Length

The fields on the music window are mostly self-explanatory and, all except for the Title, are optional. Keep in mind however, that the music search window (discussed below) will search the Title, Artist, Album Name, Description, Type of Music and Dance Category fields for the keywords you enter.

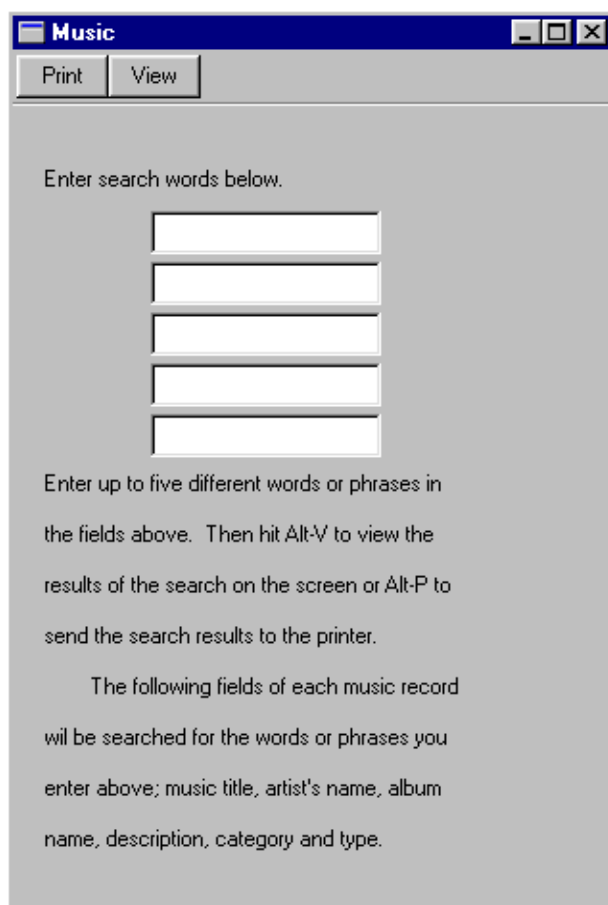
**Duplicate Button:** Selecting this button will fill in the fields on this window with the information from the last music record to have been displayed. This is useful when you are entering all of the music from an album and don't want to re-enter Artist, Album Name, etc. After entering and saving one piece, you would select *New* and then *Duplicate* before making the changes necessary for the next piece.

## Music Search Window

The music search window will let you view on the screen or print a report of the music records in the computer that have one or more of the keywords you specify in any of the following fields:

- Title
- Artist Name
- Album Name
- Description
- Type of Music
- Dance Category

The search is not selective in that if the key word is found in any one of the six fields listed above, the music record will be shown to you. This is a useful feature for times when you are unable to remember whether the title you are thinking of is the song or album title.



**View** will display the selected music records on the screen and **Print** will send the list to the printer.

# Recitals

The recital windows and reports are designed to help you plan and organize your recitals. You can keep the recital records in the computer for as long as needed. Even after student and family records are deleted from the computer the recital records remain intact.

field will be used as the default change time for all dances in this recital. You can however, enter a different time for each dance (see the following section).

**Recital Name:** Enter the recital name in this field.

**Recital Location:** Optionally enter the recital location in this field.

**Order Dances:** You can arrange the recital numbers in order either by scheduled time or by numerical sequence. Your selection here will affect how you enter information about each dance/number on the following window. For example, if you select “By Time” you will enter the scheduled time for each dance/number; 7:30 PM, 7:35 PM, etc. If you elect to order the dance/numbers numerically you will enter the number of each dance.

**Costume Change Time:** Use this field to enter a default costume change time if you want DanceONE to identify costume change conflicts. Enter the time in minutes and seconds. For example, 5:30 for 5 minutes and 30 seconds. The time you enter in this

## Recital Dances

This window is displayed when you select the Dances tab on the recital window described above.

The screenshot shows a software window titled "Recital - Spring Recital" with a "Dances" tab selected. The interface includes a toolbar with navigation and management icons, and a "Renumber Dances" button. Below the toolbar are buttons for "Add Class", "Add Student", "Remove Dancer", and "Remove All Dancers". The main area contains several input fields: "Dance/Number", "Date", "Starting Time/Dance Number", "Length" (with "min : sec" sub-labels), "Music", "Costume", "Costume Change Time" (with "min : sec" sub-labels), "Instructor/Choreographer", "Dance Category", "Average Age", "Oldest", "Youngest", and "# of Dancers" (with a value of "0"). A large empty rectangular area is present on the left side of the form.

**Dance/Number:** Enter the name of the dance or number in this field.

**Date:** Enter the date on which this dance is to be performed. Dances in a single recital can be scheduled on any number of different dates. If you specify the dates, DanceONE will be able to identify situations in which members of the same family are scheduled to dance on different dates.

**Starting Time/Dance Number:** Enter the scheduled starting time for the dance or the number of the dance in this field. DanceONE will use the starting time, the length of the dances and costume change times to identify costume change conflicts. If you are numbering the dances and need to change the dance sequence, you can use decimal points for the numbers. For example, if dance number five needs to be moved up to the third dance, change the Dance Number to 2.5.

**Length:** Enter the length of time the dance is scheduled to take in minutes and seconds.

**Music and Costume:** Use these fields to enter information about the dance music and costume. They may also be used to enter other information

about the dance that you want to appear on the recital list or program.

**Costume Change Time:** Enter the maximum time to change costumes for this dance in minutes and seconds. DanceONE uses this time to help identify costume change conflicts.

**Instructor/Choreographer:** This field can be used for instructor or choreographer information or for any other information you would like to have printed as part of the recital program.

**Dance Category:** This field can be used for dance category information or for any other information you would like to have printed as part of the recital program.

**Add Class:** Use this button to add all the students in a class to this dance. When you select this button a class list will be displayed. Highlight the class you want to be in this dance and hit

**Enter.** The names of all the students in the class will be listed as dancers in this dance.

**Add Student:** Use this button to add a single student to the dance list. When you select this button a student list will be displayed. Highlight the name of the student you want in this dance and hit **Enter.** The name of the student will be displayed as one of the dancers in this dance.

**Remove Dancer:** Use this button to remove a dancer from the dance. First highlight the dancers name on the list of dancers. Select the Remove Dancer button and the dancer will be deleted from this dance.

**Remove All Dancers:** Use this button to remove all dancers that are currently listed for this dance.

# Scheduling

There are two primary purposes for using the scheduling capabilities of DanceONE:

1) To automate the process of scheduling general and class related events and to make it easier to produce schedule reports for students, families and instructors,

2) To facilitate billing by the class, if this is the billing method you have chosen.

If you are not billing by the class, then using DanceONE's scheduling capabilities is optional and will depend on your need to schedule classes and events and produce schedule reports.

If you are billing by the class held (see the Billing chapter for an explanation of billing methods) then scheduling will be necessary in order to do automatic charge calculation and billing.

## General and Class Specific Events

DanceONE maintains a distinction between two types of events.

-General events that are not specific to any one class. Examples are shows, recitals, competitions, or parties that involve more than one class. (see the section below on Scheduling General Events)

-Class specific events are those events that are related to a specific class. The primary example of class specific events are the classes themselves. Other class specific events might be class parties, a class mothers meeting, etc.

General and class specific events are entered on different windows but are combined together to make the schedule. If, for example, you request a schedule report for a specific class for the period from January 1st through April 30th, the printed report will show all class specific events as well as any general events that fall in the specified time period.

## Billable and Non-Billable Events

Class specific events can either be billable events or non-billable events. Identifying an event as billable has no effect unless you select the "Bill by Class Held" billing method. (see the Billing chapter for a discussion of billing methods).

## Class Specific Events

Use this window to add new or modify existing class specific events.

Hitting **Enter** in the **Class** field will bring a selection list of classes from which you can choose. Type the first few letters of the class name to preposition the selection list on or near the class you want.

If there are any events scheduled for the class you have chosen, the first of these events will be displayed after you select the class. If there are no events for the class you can enter new events.

If you select the **List** option from the tool bar while you are in the class field, it will have no effect. Selecting List while in one of the other fields (after you have selected a class) will display only those events that are scheduled for the class you have selected.

The **date** field, along with the time, determine the order that scheduled events will be shown on the screen or printed on schedule reports.

For information about entering the time in the **time** field, please see the section on entering time in Chapter 2.

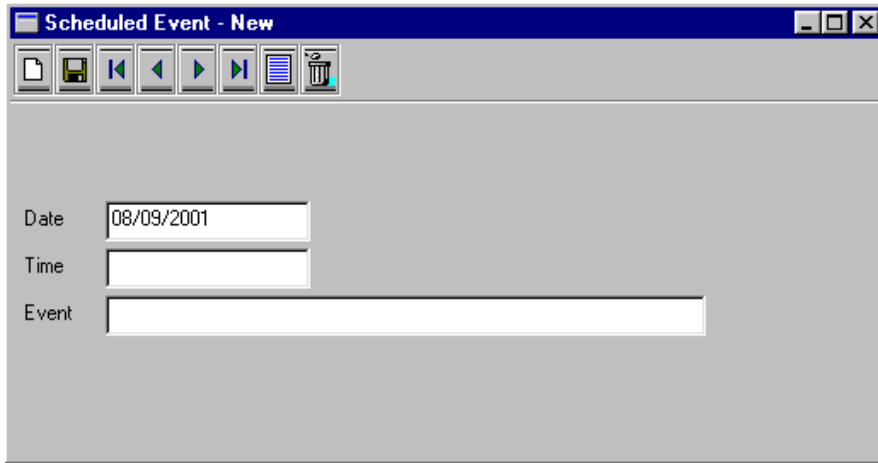
Enter a description of the scheduled event in the **Event** field. You can enter up to 80 characters of description in this field although the schedule reports will only print about 60 characters.

## Chapter 3, Putting Information In

Make sure the radio button for the **type of event** is set correctly before saving the event. See the discussion of billable and non-billable events above.

### General Scheduled Events

Use this window to add new or modify existing general scheduled events. See the discussion above for the difference between general and class specific events.



The screenshot shows a window titled "Scheduled Event - New". At the top is a toolbar with icons for file operations (New, Open, Save, Print, Copy, Paste, Undo, Redo) and a trash icon. Below the toolbar are three input fields: "Date" containing "08/09/2001", "Time", and "Event".

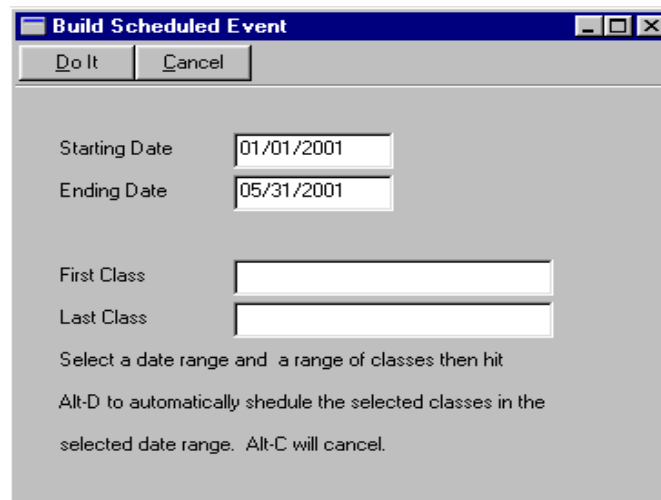
Selecting the **List** option from the tool bar in this window will display a selection list of all general scheduled events.

For a discussion of the fields on this window, see the section above dealing with the class specific event window.

### Building the Schedule

When you select the **Build the Schedule** option under Event Scheduling on the Processes menu, DanceONE will display the window shown here. Use this window to add classes to the schedule.

As an example, assume you have a class that is taught on Mondays and Thursdays at 3:00 PM.



The screenshot shows a window titled "Build Scheduled Event". At the top are "Do It" and "Cancel" buttons. Below are input fields for "Starting Date" (01/01/2001) and "Ending Date" (05/31/2001), followed by "First Class" and "Last Class" fields. Below these fields is instructional text: "Select a date range and a range of classes then hit Alt-D to automatically schedule the selected classes in the selected date range. Alt-C will cancel."

On the class window you have indicated these class times. On the schedule building window below you can specify a range of classes. This range could be just one class, several classes or all the classes. You can also specify a date range on the window. Once you have specified the class range and date range select the **Do-It** option (Alt-D). The class(es) you have selected will all be added to the schedule at their schedule days and times for the date range specified.

If the date range is January 1st through May 31st, then the class we mention above will be added to the schedule on every Monday and Thursday between January 1st and May 31st at 3:00 PM.

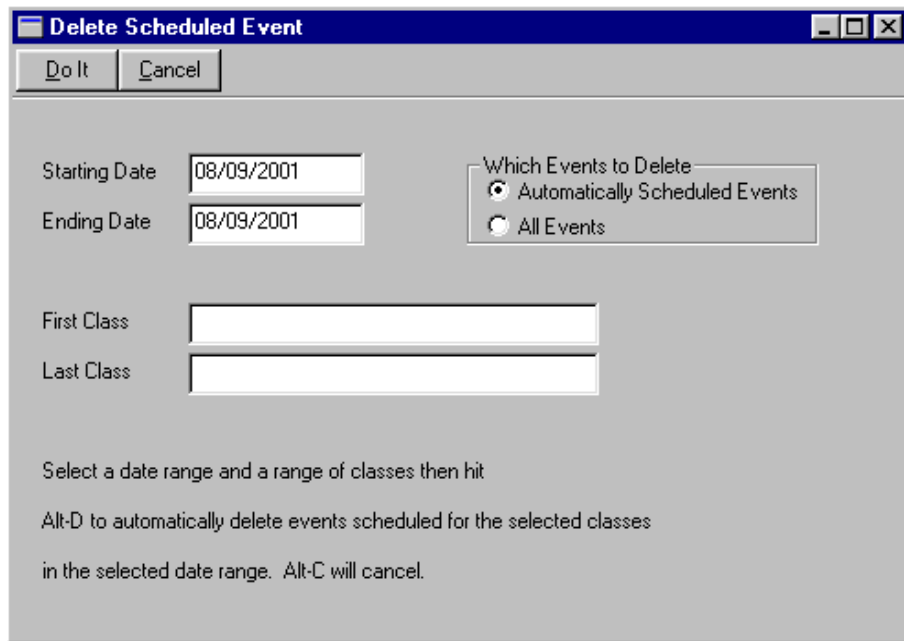
**Note:**Classes will **not** be added to the schedule on days that you have indicated are holidays. (see the section in this chapter on Holidays).

In order for a class to be added to the schedule, either the **Currently Being Taught** or the **To Be**

**Taught Next Session** check boxes must be checked on the class window.

## Deleting Scheduled Events

Scheduled events can be deleted one at a time in the Class Specific Event window or the General Event window. All events, or all automatically generated events can be deleted from the schedule for a specified range of dates using the window shown above.

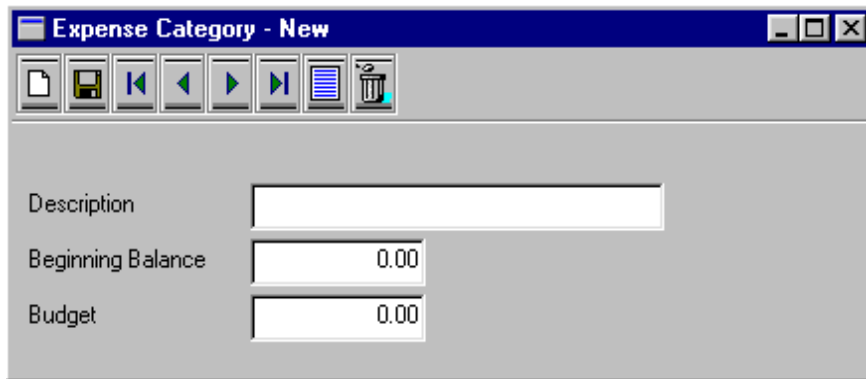


The screenshot shows a dialog box titled "Delete Scheduled Event" with a blue title bar and standard window controls. At the top left are "Do It" and "Cancel" buttons. Below are two date input fields: "Starting Date" and "Ending Date", both containing "08/09/2001". To the right is a group box "Which Events to Delete" containing two radio buttons: "Automatically Scheduled Events" (selected) and "All Events". Below these are two empty text input fields labeled "First Class" and "Last Class". At the bottom, there is instructional text: "Select a date range and a range of classes then hit Alt-D to automatically delete events scheduled for the selected classes in the selected date range. Alt-C will cancel."

## Expense Categories

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Using DanceONE you can setup a single entry accounting system for the your business expenses. Before entering the expense information, typically from your checkbook, you will need to enter expense categories in the window shown below.



Description	<input type="text"/>
Beginning Balance	<input type="text" value="0.00"/>
Budget	<input type="text" value="0.00"/>

The expense **description** describes this category of expense. For example, Studio Rent or Instructor Wages.

A **beginning balance** will need to be entered if you are not going to enter the expense records for the whole year and you know what the total amount of expenses in the category are at the point you begin entering the detail expense records. In most cases it is easier to simply enter the expense records (checks or receipts) into DanceONE than it is to calculate what the balances are at some date and then start entering expense records from that date forward.



## Expense Detail Information

---

Enter your expense information on this window. Typically this information comes from your checkbook, credit card statements or cash receipts.

The screenshot shows a window titled "Expense Transaction - New" with a toolbar containing icons for file operations and navigation. Below the toolbar are five input fields:

Date	08/10/2001
Reference	
Description	
Expense Category	
Amount	0.00

The **date** is the transaction date; the check date, credit card charge date, etc.

The **reference** is a 10 character field for a document reference. This could be your check number, a number on a cash receipt or a brief code for a credit card.

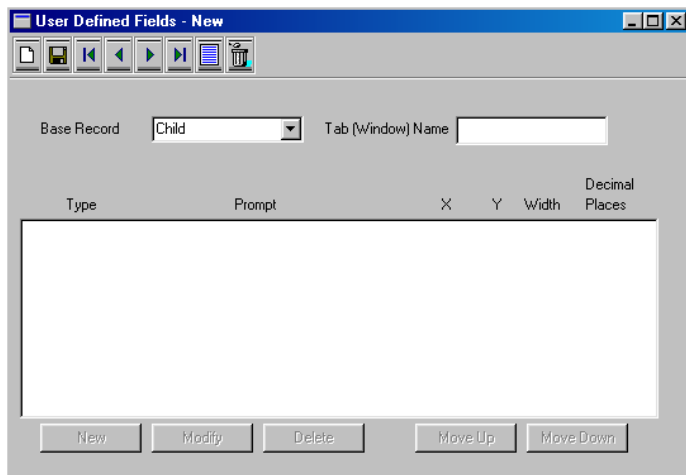
The **description** usually indicates the payee.

The **expense category** must be selected from the list of expense categories previously entered into DanceONE. Hitting the **Enter** key will display a list of categories for you to select from. Typing in the first character or two of the category name will preposition the list on or near the category you want.

## Database Customization

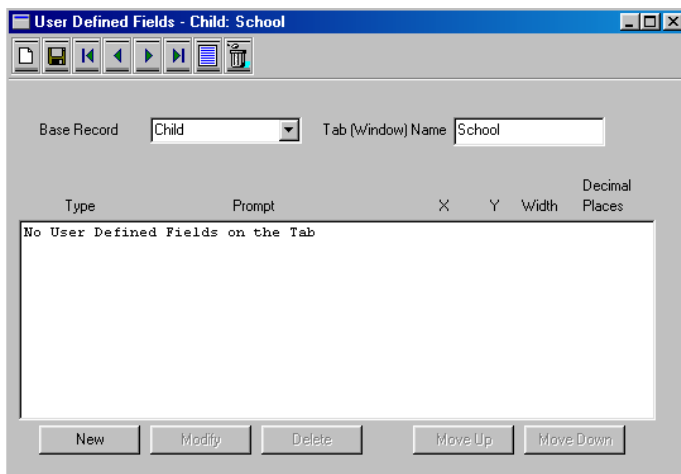
There may be times you need to keep track of information that is not part of the DanceONE database. By using DanceONE's database customization features, you can add data items to the student, family, class, student contact and family contact records.

When you select the Database Customization from the Data Entry menu the following window is displayed.



**Base Record:** Select one of the following options from this pull-down list: Student, Family, Class, Student Contact or Family Contact.

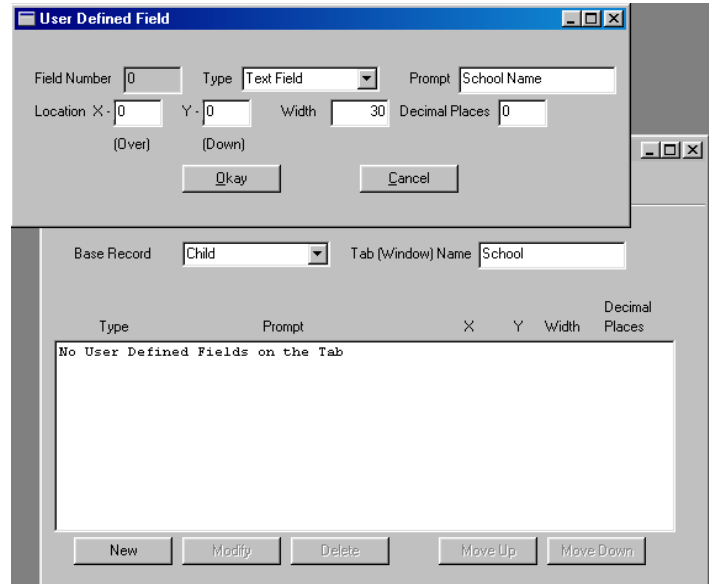
**Tab (Window) Name:** Enter in this field the name of the window tab that will be shown on the data entry window for the base record you have selected. For example, on the window shown below, a tab name of "School" is selected for the student record. This will result in a "School" window tab being displayed on



the student data entry window.

Notice that the buttons along the bottom of the window are not selectable until you have entered and saved a base record and tab (window) name.

Selecting the "New" button along the bottom of the window displays the following "User Defined Field" window.



Using this window you can specify the details of the field you want to add to the base record (in this case the student record).

**Type:** Select from this pull-down list the type of field you would like to add. Your choices are:

- **Text Field:** A alpha-numeric field up to 80 characters long.
- **Date:** A date field.
- **Number:** A numeric field - you specify the number of decimal places.
- **Dollars and Cents:** A numeric field - preformatted for 2 decimal places, dollars and cents entry and display.
- **Checkbox:** A checkbox item can be true or false, checked or not checked.

**Prompt:** A short (up to 20 character) description or prompt for the field. This description will be displayed on the data entry windows and printed on reports.

**Location X:** This number specifies the column to begin display of this field on the data entry window.

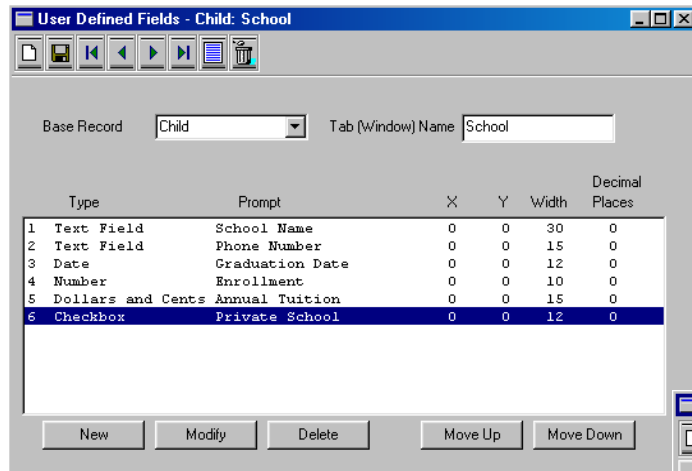
Column numbers start with 0 on the left-hand side of the window.

**Location Y:** This number specifies the row down from the top of the window to display the user defined prompt and field. Row numbers start with 0 at the top of the window.

**Important:** If you do not specify the Location X and/or the Location Y numbers, DanceONE will place the field on the next available row, starting in the first column. This may be adequate placement for many fields.

**Width:** This number indicates the width in column of the data entry field. For a text field this number also specifies the maximum number of characters that can be entered into the field.

**Decimal Places:** This number specifies the number of digits to the right of the decimal point in a number field. This number only affects “Number” fields.



As shown in the window above, you can enter several user-defined fields on a single window. You can also enter more than one window or tab for each base record. For example, you could have two or three additional user-defined windows for the child window, each with several user-defined fields.

The other buttons along the bottom of the “User Defined Fields” window are explained below.

**Modify:** Use this button to change the information you have entered about a user-defined field. First, using the mouse or the keyboard, select the user-defined field you want to modify. Then click on the “Modify” button. You can also select a user-defined field to modify by double-clicking with the mouse.

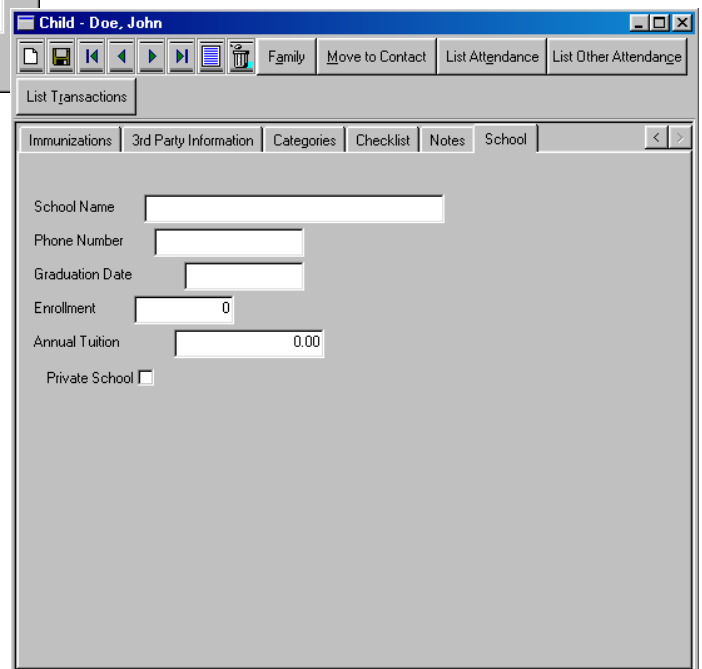
**Note:** Be careful when changing the type of a user-defined field. This is especially true if information has been entered into the field. Changing the type can lead to unexpected results. It is usually a better idea to delete the existing user-defined field and add a new field with the new type.

**Delete:** Use this button to delete a user-defined field. Select the field to be deleted by using the mouse or keyboard and then select the delete button. When you delete a user-defined field, all the data that has been entered into the field will also be deleted. For example, on the window shown above, if you have entered information into the “School Name” field for a number of children and then you decide to delete that field, all of the “School Name” data you have entered will also be deleted.

**Move Up/Move Down:** Use the “Move Up” and “Move Down” buttons to re-order the user-defined fields on a window. Select the field to be moved and then select “Move Up” to move the field up on the list. The “Move Down” button will move the field down on the list.

## Entering Data Into User-Defined Fields

The window below shows the user-defined window we have created on the child data entry window. After you have created a user-defined window and fields, it will automatically be



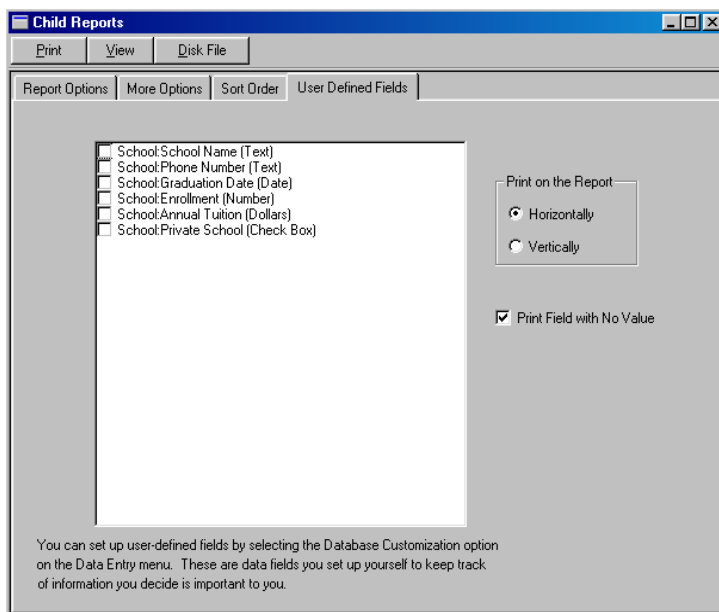
## Chapter 3, Putting Information In

displayed the next time you display the data entry window for the base record. As was mentioned above, you can create more than one user-defined window for any base record. The user-defined windows will show up in alphabetical order at the end of the other tabs on the data entry window. Once the user-defined fields are created, entering data into them is no different than any other data entry field in DanceONE.

not checked, fields with no data will not be printed on the report.

## Printing the User-Defined Fields

The data you enter into your user-defined fields can be printed on most reports in DanceONE. Shown



here is the User-Defined Fields tab on the Student Reports window.

All user-defined fields you have created will be displayed on the list. Select the field(s) you want on your report by checking the appropriate boxes.

**Print on the Report:** If you select the “Horizontally” button in this box, as many fields as will fit will be printed on a line with more fields on following lines until all the selected user-defined fields are printed. If you select “Vertically”, the selected fields will be printed one per line against the left-hand margin.

**Print Field with No Value:** If this box is checked, user-defined fields that have not had data entered into them will be printed with blanks. If this box is

## General Information

The general information windows contain information that typically you will not need to change very often. To save any changes you make on the general information windows select the “Save” button.

Typically you would enter information into these windows when you are initially setting up DanceONE for use in your dance business.

### Business Name and Address

The business name you enter on this window will be printed at the top of most report pages and the business name and address will be printed on your billing statements.

selection list will be displayed allowing you to easily selected the record to work with.

If you check the box to always start with a new record, instead of displaying the first record when the window is first opened, a blank window ready to enter a new record will be displayed.

**Autosave when leaving record on data entry window:** If this box is checked, any changes you make on data entry windows will be automatically saved when you move to a different record or close the window. If this box is not checked, changes will only be saved if you select the “Save” button.

**Don't automatically move to student window after saving new family:** by default, the new student window will be automatically displayed whenever you save a new family record. To disable this behavior, check this box.

**Disable same/today's date button on transaction window** - checking this option will disable the default date button on the transaction window. This button toggles the default date between today's date and the date of the last transaction displayed. After selecting the option you want on the transaction window you can check this box to ensure that it will not be accidentally changed.

**City, State and Zipcode Defaults:** Information entered in these fields will automatically appear in the corresponding fields when you are entering new families, instructors or family contacts.

1

**Miscellaneous Options:** These two options control the way data entry windows are initially displayed. The options are self-explanatory. If neither option is checked, data entry windows open with the first record displayed. For example, when the student window is first opened, the first student will be displayed.

If you check the box to automatically display the selection list, when the window is first opened, a

## Printing Options

Use this window to enter general information about printing in DanceONE.

The screenshot shows the 'General Information' window with the 'Printing Options' tab selected. The window has a 'Save' button at the top left. Below the title bar are tabs for 'Business Name/Address', 'Printing Options', 'Session Dates', 'Toolbar Buttons', 'Password Security', 'Email', and 'Letters'. The 'Printing Options' section is divided into several areas: 'Page Margins (Inches)' with input fields for Left (0.500), Top (0.500), Right (0.500), and Bottom (0.500); 'Label Printing Options' with a 'Label Type' list (One Wide, Two Wide, Three Wide (selected), Four Wide, Five Wide, Six Wide); 'Printing Font' with radio buttons for Courier New (selected), Default, Letter Gothic, and OCR A Extended; 'Font Size' with an input field set to 10; 'Orientation' with radio buttons for Portrait (selected) and Landscape; and 'Print Receipts' with radio buttons for Yes and No (selected). At the bottom right, 'Labels Per Page' is set to 30, and 'Page Margin for Labels (in inches)' has input fields for Top, Left, Right, and Bottom Margins, all set to 0.500.

**Save Button:** Use this button to save any changes you have made to the information on this window.

**Page Margins:** Enter in inches the page margins you need.

**Printing Font:** You should have the option to choose between 4 default fonts on this box. If the fonts shown above do not appear on your screen you can install the fonts from the DanceONE CD. Follow these instructions to install the fonts:

- 1 - Click **Start**, point to **Settings**, click **Control Panel**, and then double-click **Fonts**.
- 2 - On the **File** menu, click **Install New Font**.
- 3 - Click the drive containing your DanceONE CD, and then click the fonts folder that contains the fonts you want to add.
- 4 - Click the font(s) you want to add.
- 5 - You may have to restart your machine to make the fonts available.

**Print Receipts:** If you want to have the option of printing a receipt each time you enter a payment, select **Yes** in this box. If "Yes" is selected, each time you save a payment transaction on the transaction window, DanceONE will ask if you would like a

receipt printed. You will have the option of either printing or not printing the receipt.

If you select **No** in this box, receipts will not be printed when payment transactions are entered.

For more information about printing receipts, see the "Transactions" section earlier in this chapter.

**Labels:** If you will be printing mailing labels with DanceONE you should indicate

whether you will be using one wide, two wide or three wide label sheets. Typically one wide label sheets are used in dot matrix printers and two or three wide sheets are used in laser or ink jet printers.

**Labels Per Page:** Enter the total number of labels on each sheet. This number is ignored if you are using 1 wide tractor fed labels.

**Label Margins:** By changing the inches entered in these fields, you can adjust your label printing up and down and right and left on the page. Use these fields to fine tune the position of your information on the labels.

### Session Dates/Receipt Message

The beginning and ending dates of the current and next sessions should be changed each time you move

The screenshot shows a window titled "General Information" with a "Save" button and several tabs: "Business Name/Address", "Printing Options", "Dates/Receipt Message", "Toolbar Buttons", "Password Security", "Email", and "Letters". The "Dates/Receipt Message" tab is selected. It contains two columns: "Current Session" and "Next Session". Under "Current Session", there are two date fields: "Beginning Date" with the value "09/01/2006" and "Ending Date" with the value "06/30/2007". Under "Next Session", there are two date fields: "Beginning Date" with the value "09/01/2007" and "Ending Date" with the value "06/30/2008". Below these fields is a section titled "Message to be included on printed receipts." followed by five empty text input lines.

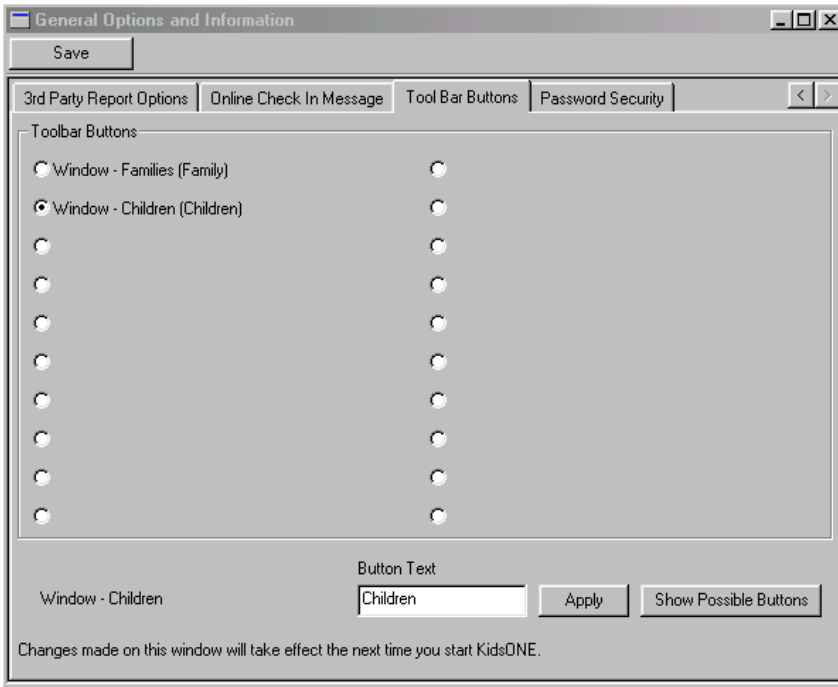
from one session to the next.

**Receipt Message:** The message you enter here will be printed on all payment receipts.

Transaction window, you could enter “Transactions” as the button text.

## Toolbar Buttons

4 - Click on the apply button to finalize the shortcut.



Note: Any changes you make on this window will not take effect until the next time you start the DanceONE program.

**To delete a shortcut** follow these steps:

1 - Click on the radio button for the shortcut you want to delete.

2 - Blank out the information in the “Button Text” field.

3 - Click on the “Apply” button the have the changes take effect.

On this window you can select up to 20 options (or shortcuts) that will be shown as buttons on your main DanceONE window. By clicking on the buttons, you can go straight to the selected option without navigating through the DanceONE menus. On the window shown above, we have selected the Family window and the Child window. Based on these selections, the main DanceONE window will look like this:

**To add a new button** to the shortcut toolbar, follow these steps:

1 - Click on one of the unused radio buttons on the Tool Bar Button window shown at left.

2 - Click on the “Show Possible Buttons” button at the bottom right of the window. A list of possible windows, reports, billing procedures and processes will be displayed. Use the arrow keys or the mouse to select the option you want to create a shortcut for. Hit the Enter key to select the option.

3 - In the “Button Text” field enter a brief description of the shortcut. This description will be shown on the shortcut button on the main DanceONE window. For example, if you are creating a shortcut button to take you directly to the

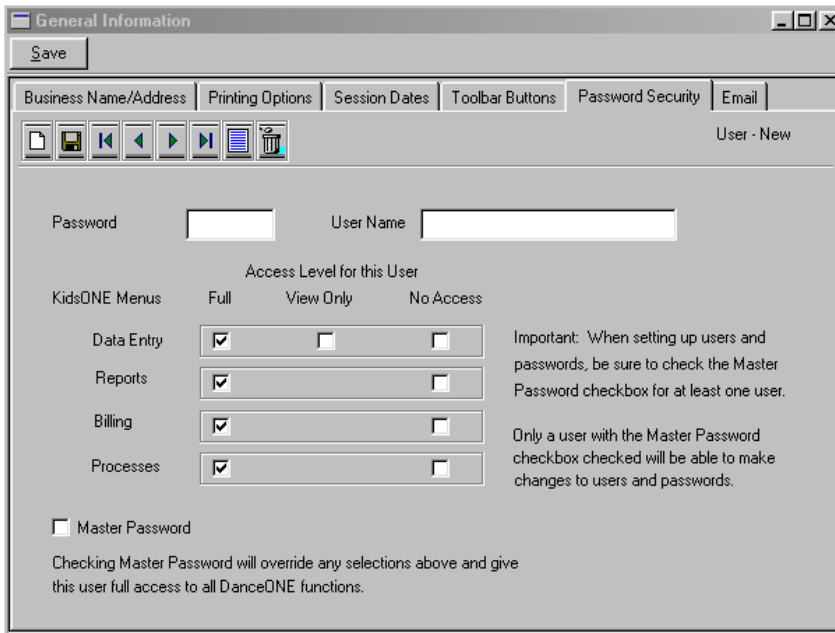


## Password Security

Using this window you are able to specify a password that can help make your DanceONE system more secure from unauthorized access. If you enter one or more password records in this window, then each time DanceONE is started, a window requesting a password will be displayed. In order to get into the program, the user will need to enter a legitimate password. If no password records are entered on this window, DanceONE will start without requiring a password.

enter that particular area of the program. If the user selects an option for which “No Access” has been specified, a message is displayed informing the user of this fact. This is also true if a user with “View Only” access attempts to save or delete a record.

**Master Password:** The master password box should be checked for at least one user. Only master password users are allowed to make changes on this password window. Master password users also have full access to all areas of the program.



General Information

Save

Business Name/Address | Printing Options | Session Dates | Toolbar Buttons | Password Security | Email

User - New

Password:  User Name:

Access Level for this User

KidsONE Menus	Full	View Only	No Access
Data Entry	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Processes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Master Password

Important: When setting up users and passwords, be sure to check the Master Password checkbox for at least one user.

Only a user with the Master Password checkbox checked will be able to make changes to users and passwords.

Checking Master Password will override any selections above and give this user full access to all DanceONE functions.

**Password:** A password can be up to 8 characters long. It can be any combination of letters, numbers or other keyboard symbols. As you type the password, or when a password record is displayed, the password will not be displayed on the screen. You should exercise care in typing the passwords so that they are entered correctly. Passwords are case sensitive. This means that “Big Boy” is a different password than “big boy”.

**User Name:** A user name is not required but can be entered.

**Access Level:** For each of the main DanceONE menus, select “Full” access, “View Only” access or “No Access”. Full access places no restrictions on what the user can do. “View Only” access generally means that information can be viewed but not modified. “No Access” does not permit the user to

## Email Settings

Use this window to enter the information that DanceONE needs to access your email account.

The screenshot shows a window titled "General Information" with a "Save" button. The window has several tabs: "Business Name/Address", "Printing Options", "Session Dates", "Toolbar Buttons", "Password Security", and "Email". The "Email" tab is selected. The form contains the following fields:

- "Outgoing Mail (SMTP) Server Name" with the text "mail.kidsonesoftware.com".
- "Your E-mail Address" with the text "support@kidsonesoftware.com".
- "Your Name (optional)" with the text "John Fellmeth".
- "Type of Connection" section with two radio buttons: "Dial-up Modem" (selected) and "Always On (DSL/Cable)".
- "Phone Book Entry (if Dial-up)" with a pull-down menu.

If you do not specify the information on this window, you will not be able to send email from DanceONE.

**Outgoing Mail (SMTP) Server Name:** Enter in this field the name of the SMTP server for your outgoing messages. You can generally get this information from your Internet service provider or LAN administrator.

**Your Email Address:** Enter your email address in this field. This is the email address with the “@” sign in it.

**Your Name:** Specify in this field the “friendly” name associated with your email address. When you send a message, this name appears in the **From** box of your outgoing message.

**Type of Connection:** Select the type of your connection to the Internet.

**Phone Book Entry:** If you have selected a “Dial-up” connection type, you should select from this pull-down list the phone book entry to use. You may only have one entry to select from this list.

### Registration Letters

Enter on this window the text you wish to have printed on your registration or pre-registration letters.

The screenshot shows a software window titled "General Information" with a "Save" button in the top-left corner. The window has several tabs: "Business Name/Address", "Printing Options", "Session Dates", "Toolbar Buttons", "Password Security", "Email", and "Letters". The "Letters" tab is currently selected. Under the "Letters" tab, there are two sections: "Registration Letter" and "Pre-registration Letter". Each section contains five horizontal text input fields for entering text.

## Holidays

---

Holidays are entered into DanceONE to enhance the automatic scheduling process (see the section in Chapter 4, entitled Scheduling). When you instruct DanceONE to automatically create class schedules, no classes will be scheduled on those dates you have specified as holidays. If you schedule make-up classes for the classes missed due to holidays, then you should manually add the make-up classes to the schedule (see the Scheduling section).

The use of holidays in DanceONE is optional and is only needed if you plan to use the automatic scheduling features.

For single day holidays, the **beginning date** and the **ending date** will be the same. Remember, classes will not be automatically scheduled on the beginning date or the ending date or any date between.

The image shows a screenshot of a software dialog box titled "Holiday - New". The dialog box has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a toolbar containing several icons: a document icon, a floppy disk icon, a left arrow, a right arrow, a list icon, and a trash can icon. The main area of the dialog box is light gray and contains three input fields. The first field is labeled "Beginning Date" and is empty. The second field is labeled "Ending Date" and is also empty. The third field is labeled "Description" and is a larger text area, currently empty.

# Processes

## C H A P T E R 4

DanceONE processes are functions that are neither information entry or reporting. Typically these functions will automate a task that otherwise would take a significant amount of time and effort. For example, blanking out all the student measurements or deleting all the attendance records prior to a certain date.

After you select any option from the processes menu, you will be shown a window that will allow you to cancel the option if you don't want to proceed. You may also need to enter some information in the window such as a date prior to which all records will be deleted.

It is always important to back up your DanceONE data files on a regular basis (see the section on Backing Up in Chapter 1). It is especially important that you have a current back up before running some of the options on the processes menu. Some of the options on the processes menu are explained below. Many of the processes are self-explanatory.

### Blank Student Measurements

Selecting this option will set all costume measurements on all student records to zero.

### Clear Waiting Lists

Selecting this option will clear the waiting list for all classes.

### Move Pre-Registered to Enrolled

Use this option to move pre-registered students to enrolled status.

### Copy Enrolled Students to Pre-Registered

This option will copy currently enrolled students to pre-registered status. Use this option if you are pre-registering and want to start with those currently enrolled as a basis for your pre-registration.

### Delete all Classes

Make sure this is what you want to do before running this process. All classes will be deleted along with associated records such as attendance records. You might select this option at the beginning of a new year but generally it would be easier to retain your class records, make any necessary changes to days and times taught, add any new classes that are being taught and delete any classes that are no longer being taught.

### Remove Costumes from All Classes

This option will remove all costumes that have been added to classes. The class and costume records will remain but the costumes will no longer be attached to any classes.

### Un-Enroll All Students

This option allows you to remove any students who are currently enrolled in a class. This is useful for starting over with enrolling students but make sure this is what you want to do before selecting this option.

### Copy Students from One Class to Another

Using this option you can automatically enroll in a class all the students that are currently enrolled in another class.

### Zero all Student Charges, Zero all Family Charges

Using these options will zero out all charge and discount amounts entered on either the student or family windows. Charges and discounts already posted to the families' accounts will not be affected.

### Make all Students or Families Active or Inactive

Using these options you can make all families or all students active or inactive with a single click. This might be useful if, as part of your enrollment process you want to make all students inactive and then activate them only as they re-enroll.

### Delete Unenrolled Students and/or Families

Using these options you can automatically delete all unenrolled students or all unenrolled students and their families. An unenrolled student is one not currently enrolled in a class. These options should be used carefully.

### Clear Attendance Records

Selecting this option will allow you to specify a date prior to which all attendance records will be deleted. It is a good idea to print attendance reports for the period prior to the deletion date.

### Build Schedule

This option enables you to automatically add schedule records for classes (based on the day and time the class is taught) for each time the class is taught. You can specify the date range to build the schedule.

### Delete Schedule

This option will delete schedule records for the date range that you specify. Used primarily for deleting last sessions schedule before starting a new schedule, or for cleaning up after mistakes in building the schedule.

### Delete Holidays

Use this option to delete all holiday records prior to a date you specify.

### Music Search

This option will allow you to search your music records for the music you need to find. For

additional information about this option see the section on Music in Chapter 3.

### Delete Expense Detail Records

Selecting this option will delete all expense detail records with a date earlier than the date you specify. Expense category records will be unaffected. It is a good idea to print a detailed expense ledger covering the period up to the deleting date. This option is usually run after you have closed out our financial year and printed any reports that are necessary.

It is not necessary to delete expense records. You can keep as many year's expense detail in the computer as you like.

### Zero Beginning Balances

This option will set all family beginning balances (tuition, costume and other) to zero.

### Transfer Billing Transactions to the History File

Use this option to transfer billing transactions (charges, payments, credits and late charges) to a history file and update the family beginning balances as of the date you specify. Again, it is important that you print a detail accounts receivable ledger that covers the dates to be transferred prior to running this process.

In addition to transferring the detail records to a history file, this process also updates the beginning balances on the family records to the date you specify. For example, if you entered beginning balances on your family records as of September 1st and then ran this process on December 31st, all the detail transactions prior to December 31st would be transferred to the history file and the beginning balances on the family records would be updated to December 31st.

Running this process is optional in DanceONE. Typically you would run this option sometime after the end of your calendar and dance years and probably specify December 31st of the previous year as the cut-off date. If you have questions about running this option, please call ONE Software technical support.

## Retrieve Billing Information from the History File

This option reverses the process of transferring billing information (charges and payments) from the active accounts to the history file. It removes transactions from the history file and puts them back into the families' active accounts. When you select this option you will be asked for a date range for the transactions to be retrieved. The families' beginning balances will be adjusted so that their current balances will be unchanged by the transfer. If the family record has been deleted, any transactions for the deleted family will remain in the history file.

## Empty the History File

This option allows you to empty the transaction history file. You will probably want to print a detailed ledger of historical transactions before emptying the file.

## Delete Transactions

Use this option to delete billing transactions for any time period you specify. You can select the type of transaction you want to delete. Specifying the same date for the first and last date of the date range to cover will result in transactions only being deleted for that day. This option is useful if you have made a mistake when you calculate charges in the billing module. Using this option you can delete the incorrect charges and start over.

## Database Functions

These functions allow you to correct certain types of problems that may arise in your DanceONE database. Typically you should only run these functions after contacting ONE Software technical support.

## Other Processes

A variety of other options are available on the processes menu. You may want to review this menu choice in the DanceONE program to familiarize yourself with these choices.





Using this window you can indicate the number of copies of your report, the page range to print and setup your printer options. Select **OK** to go ahead and print or view your report, select **Cancel** if you do not wish to view or print the report.

# Reports

## C H A P T E R 5

### Reports in General

DanceONE's reports are designed to give you the information you need, organized in a useful format.

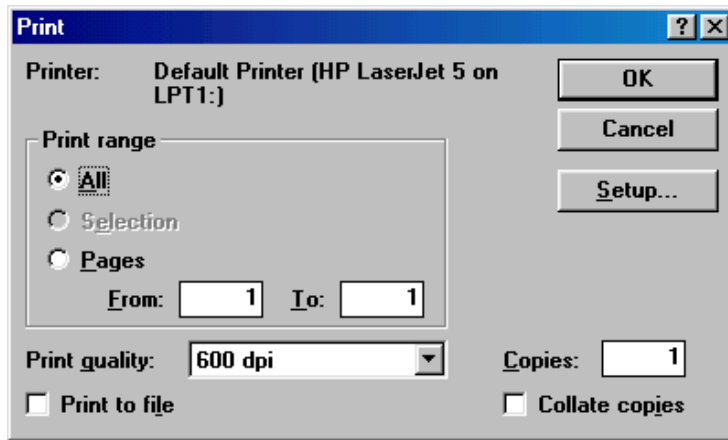
We are always looking for ways to improve the reporting capabilities of DanceONE. If you have ideas about changes in existing reports or entirely new reports you would like to see, please drop us a line or give us a call.

Most DanceONE windows have three selections available on the tool bar. These are; **Print**, **View** and **Disk File**.

Selecting the **Print** option will send the report directly to your printer. Before selecting this option always make sure your printer is turned on and on-line.

Selecting the **View** option will display your report on the screen.

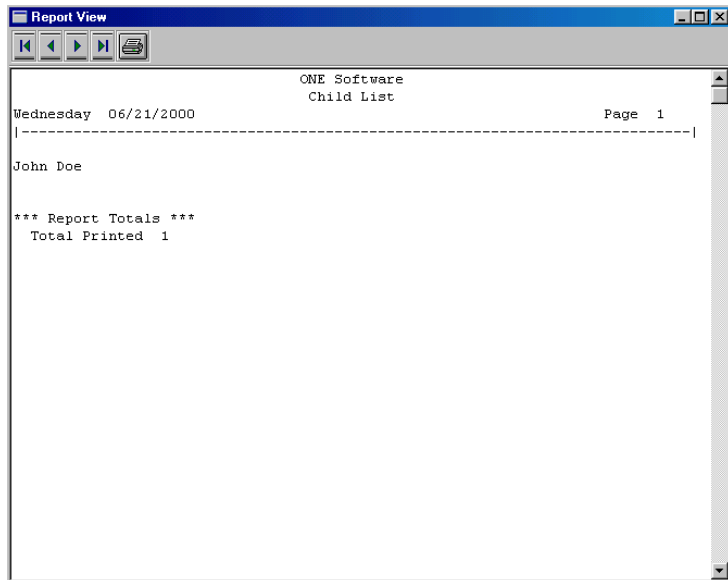
When you select the Print or View option this dialog



window is displayed.

## Viewing Reports

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Report View Window

Selecting the **View** option will display the report on the screen prior to printing it.

If you want to make changes to the report before printing it, make these changes in the report view window.

The buttons on the toolbar of the report view window allow you to view the first, previous, next and last pages of the report as well as send the report to the printer.

## Report Windows

---

A sample of the different types of report windows are discussed on the next few pages. All the possible windows are not shown since they all work in a similar manner.

### Optional Heading Lines

Most report windows have 2 fields for entering optional heading lines. Anything you type into these fields will print as additional heading information at the top of each page of your report.

### Selecting Records to Print

On many report windows you will be presented with a number of options for selecting the records you want to include in your report.

For an example, see the family report window in the section of this chapter titled "Family Reports". At the top of the window notice the fields for Family, Family Category, Class, Location and Instructor. When you type anything into one of these fields and hit **Enter** you will be presented with a selection list of families, family categories, etc. Highlight your choice and hit **Enter** to select it, or close the list window (Ctrl-F4) if you choose not to make a selection.

You may make a selection in more than one of the record selection fields. For example, you may want to print all families in a certain location that are in a specific family category. In this case you would select a location record for the location field and a family category record for the family category field.

In addition to the selection fields at the top of the report window, some reports have additional selection criteria. On the family window there are two, the selection dates and the account balances.

Many reports allow you to select records based on a beginning and ending date. Examples include detail billing statements, payment receipts, accounts receivable and aging ledgers. When a report window is first displayed, the first date is usually blank and the last date shows today's date. If you leave the dates as they are, your report will include all records from the beginning through today. If you want to narrow the date range to cover a specific period of time make the appropriate changes to the first and last dates.

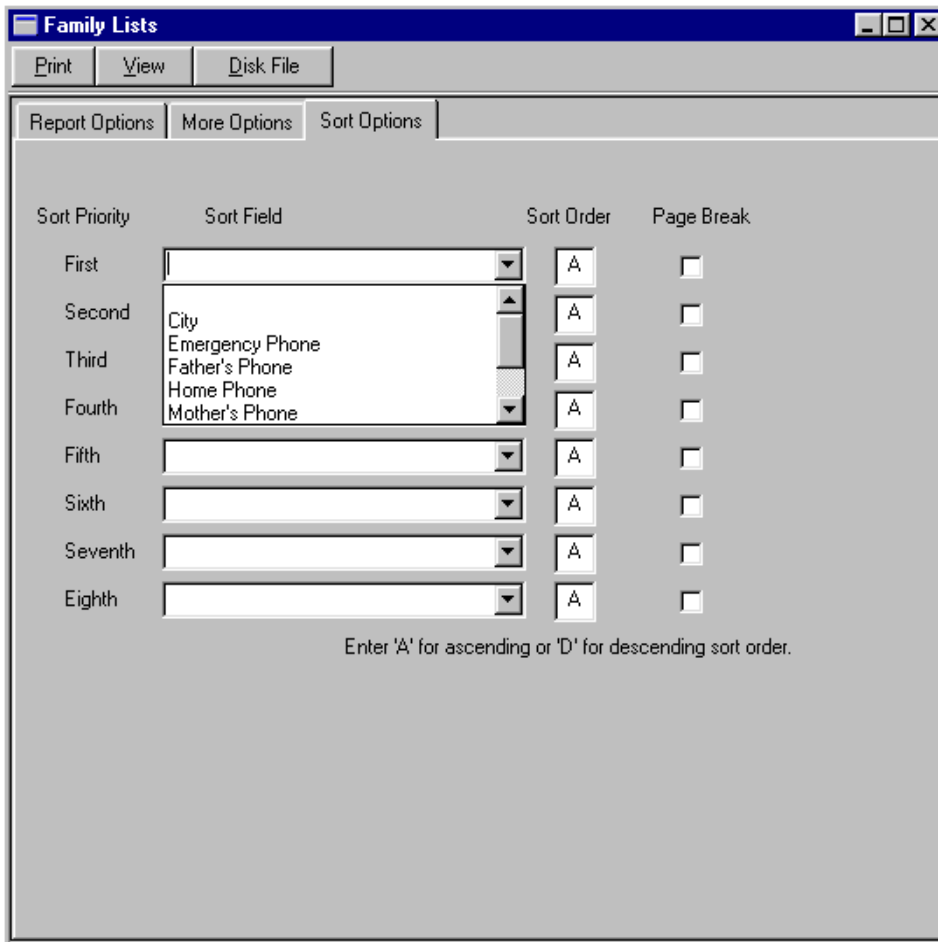
### Selecting Information to Include

Many report windows contain an Include group with check boxes to select exactly the information you wish to include in your report. Using these check boxes, you can design reports to meet the unique needs of your business. For example, you may want a family list that shows family name, telephone number, billing transaction detail and account aging for all families that have a current balance due. Using the Family List report you can select just the

families you want to see on the report and just the information you want to see for each family.

### Sorting Records for Your Report

This window is displayed when you select the Sort button from one of the report windows. It is used to specify the order in which you want the records sorted for your report.



priority sort field and the child name as the second priority sort field.

Sort fields you specify need not be fields that you are printing in the report. You could for example, sort the student records by family name but then not include the family name among the fields to be printed on the report.

**Sort Order:** Enter either **A** or **D** in this field to

indicate ascending or descending sort order respectively. If you are sorting in ascending order the smallest numbers, earliest dates or alphabetically earlier fields will be sorted first.

Descending of course, is the opposite. If you are sorting a child list by birth date, ascending order will list the oldest children first (the earlier birth dates) and descending will list the youngest children first. Ascending order is the default.

**Page Break:** Checking the page break checkbox for a sort field will result in the report starting at the top of a new page each time the sort field data changes. For example, if you are sorting a student list by class and want each new class to start on a new page then check the page break checkbox on the same line as the class name is selected for the sort field.

**Sort Field:** Hit **Enter** or click on the down arrow in any of the sort fields to see a list of fields available to be used for sorting. Use the mouse or enter key to select the information you would like to sort on.

Up to eight sort fields can be specified for a report. The sort fields should be specified in order of their sorting priority. The lower priority sort fields will be sorted before the higher priority sort fields. For example if you want a child list sorted by zip code and alphabetically by child name within the same zip code you would specify the zip code as the first

## Family Reports

This window will be displayed when you choose a report that is based on the family record. Examples include family list, registration and pre-registration letters, billing statements, receipts and mailing labels.

**Selecting Records:** You can use the Family, Family Category, Class, Location and Instructor fields to indicate which records you wish to include in your report. You may make a selection in some or all or none of these fields.

You may also select families for inclusion in your report based on their current account balance. Check the appropriate box or boxes for Charge Balance (they currently owe), Credit Balance, Zero Balance or Tuition, Costume or Other Balance. As an example, you may want to print billing statements only for those families that current have a tuition balance due. In this case check only the Tuition Balance Box.

Certain reports such as billing statements or payment receipts require a beginning and ending date to determine which billing transactions should be included in the report. Enter a date in the First and Last date fields to specify the date range for your report.

**Include:** The Include group is only active when you have selected Family List from the menu. Check any or all or none of the boxes in this group to specify the information you want printed on your family list. If none of the boxes are checked, the family list will show only the family names. Additional information about some of the items in the include group is presented below.

Balances due include all transactions posted to the family's account, in other words, you cannot print a balance due at a specified date with this item.

Transaction Detail will be printed and summarized based on the First and Last select dates entered on this window.

Classes/Locations will show information about the classes that each student in the family is currently enrolled in. The same is true for Student Measurements and Student Notes.

**Include Inactive:** If this checkbox is checked families with the Inactive checkbox checked will be included in your report. If you do not want to include these inactive families, un-check this box.

**New Page for Each Family:** Check this box if you want to start printing each family's information at the top of a new page.

## Student Reports

This window will be displayed when you choose a report that is based on the student records.

Examples include the student list, attendance reports by student and student mailing labels.

**Selecting Records:** You can use the Student, Family, Class, Location, Instructor, Student Category, Family Category and Class Category fields to indicate which records you wish to include in your report. You may use some or all or none of these fields to select students for your report. For more information on using these fields see the introduction to this chapter.

Certain reports, such as a report of attendance by student, require a beginning and ending date to determine which attendance records should be included in the report. Enter a date in the First and Last date fields to specify the date range for your report.

**Include:** The include group is only active when you are printing the student list. Check any or all or none of the boxes in the group to specify the information you want printed on your student list. If none of the boxes are checked, the student list will show only the student names.

**Include Inactive:** If this checkbox is checked, students with the Inactive checkbox checked will be included in your report. If you do not want to include these inactive students, un-check this box.

**New Page for Each Student:** Check this box if you want to start printing each student's information at the top of a new page.

### Additional Options for Student Reports

Selecting the "More Options" tab on the student report window will display the following additional information window.

Entering dates in the Earliest and Latest Birthday fields will select only students whose birthday falls in the date range for inclusion on the student

list. You can customize your birthday lists by using the selection fields on the first student report window. For example you may want to print separate birthday lists for each instructor that also

show addresses, telephone numbers and classes currently enrolled in.

## Class Reports

This window will be displayed when you choose a report that is based on the class records. Examples include class lists, student measurement worksheets, attendance rolls, attendance reports by class, schedule reports by class, billing statements and mailing labels.

**Selecting Records:** You can use the Class, Class Category, Location and Instructor fields to indicate which records you wish to include in your report. You may make a selection in some or all or none of these fields. For more information on using these fields, see the introduction to this chapter.

Certain reports such as billing statements or schedule reports require a beginning and ending date to determine the records to include in the report. Enter a date in the First and Last date fields to specify the date range for your report.

If you only want class that are currently being taught included in your report check the appropriate checkbox.

**Include:** The Include group is only active when you have select the Class List from the menu. Check any or all or none of the boxes in this group to specify the information you want printed on your class list. If none of the boxes are checked, the class list will show only the class names. Additional information about some of the items in the include group is presented below.

All the information from Parents Names on down in the include group will be printed for all Enrolled, Waiting or Pre-Registered students if, you have checked the Enrolled, Waiting or Pre-Registered box above. In other words, checking the Parents Names and Address boxes will not result in any parents names or address being printed on your report unless one of the Enrolled, Waiting or Pre-Registered boxes is check above.

Balances Due include all transactions posted to the family's account and are not affected by any First or Last select date you may have entered.

**New Page for Each Class:** Check this box if you want to start printing each new classes information at the top of the page.

### Additional Options for Class

### Reports

If you select the "More Options" tab on the class reports window, this window is displayed.

By checking the appropriate box(es) on this window you

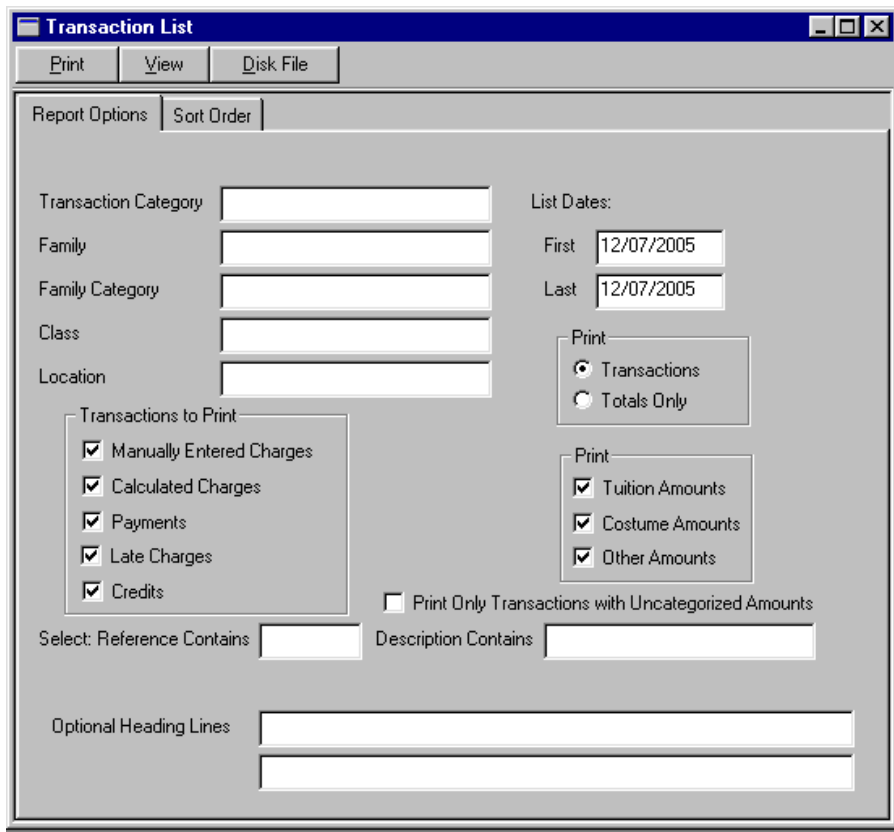
can select classes to include in your report that are taught on the days indicated. For instance if you want attendance rolls printed only for classes taught on Friday, you would un-check all boxes except Friday. Be sure to select the **OK** button to return to the first class reports window.

# Transaction Reports

This window allows you to print financial transaction reports using a variety of selection and sorting options.

in the report. To specify a single day use the same first and last date.

**Types of Transactions to Print:** By checking the appropriate check boxes you can select any combination of the following types of transactions for your report:



- Manually Entered Charge Transactions
- Calculated Charge Transactions
- Payment Transactions
- Late Charge Transactions
- Credit Transactions

**Print Transaction Detail or Totals Only:** If you want the individual transactions as well as totals listed on your report, select the "Transactions" button. If you want totals only on your report, select the "Totals Only" button.

**Print Tuition, Costume or Other Amounts:** By default all three boxes are checked and tuition, costume and other amounts will all be printed on your transaction list. If for example, you wanted only tuition amounts to print on your report you would un-check the other two check boxes.

**Optional Heading Lines:** Information you enter in these fields will be printed as part of the page headings in your report. Additional information in the report headings can make it easier for individuals using the report to understand the report's purpose.

For more information about the buttons on the tool bar see the introductory sections of this chapter.

**Selecting Financial Transactions:** You can use the Transaction Category, Family and Family Category fields to select the financial transaction records you wish to include in your reports. You may make a selection in one or more of these fields. The financial transactions must meet all the criteria you specify to be included in your report.

For more information about selecting records for inclusion in your report see the earlier section in this chapter; Selecting Record to Print.

You can also select transactions to include in your report that have specified words or numbers in the reference or description fields. This can be useful to search for a payment by check number or name.

**Selection Dates:** The first and last dates indicate the time period to be covered by your report. Only transactions dated in this date range will be included



## Family Contact/Applicant Reports

This window will be displayed when you choose a report that is based on the family contact or applicant record. Examples include the family contact list and mailing labels.

The screenshot shows a window titled "Family Contact Reports" with a menu bar containing "Print", "View", and "Disk File". Below the menu bar are three tabs: "Report Options", "More Options", and "Sort Options". The "Report Options" tab is selected. The main area contains three text input fields for "Family Name", "Category", and "Note Category". To the right of these fields is an "Include" group box with four checkboxes: "Addresses", "Telephone Numbers", "Categories", and "Notes". Below the input fields are two more text input fields labeled "Optional Heading Lines". At the bottom of the dialog is a checkbox labeled "New Page for Each Student Contact".

**Selecting Records:** You can use the Family Contact Name, or Category to indicate which records you wish to include in your report. You may make a selection in either or both of these fields.

**Include:** The Include group is only active when you have selected Family Contact List from the menu. Check any or all or none of the boxes in this group to specify the information you want printed on your family contact list. If none of the boxes are selected, the family contact list will show only family names.

**New Page for Each Family Contact:** Check this box if you want to start printing each families' information at the top of a new page.

## Student Contact/Applicant Reports

---

This window will be displayed when you choose a report that is based on the student contact or applicant record. Examples include student contact list or mailing labels.

The screenshot shows a window titled "Student Contact Reports" with a menu bar containing "Print", "View", and "Disk File". Below the menu bar are three tabs: "Report Options", "More Options", and "Sort Options". The "Report Options" tab is active. It contains several input fields: "Student", "Family", "Category", and "Note Category", each with a text box. To the right of these fields is an "Include" group box containing five checkboxes: "Parents' Names", "Addresses", "Telephone Numbers", "Categories", and "Notes". Below the input fields is a section labeled "Optional Heading Lines" with two empty text boxes. At the bottom of the window is a checkbox labeled "New Page for Each Student Contact".

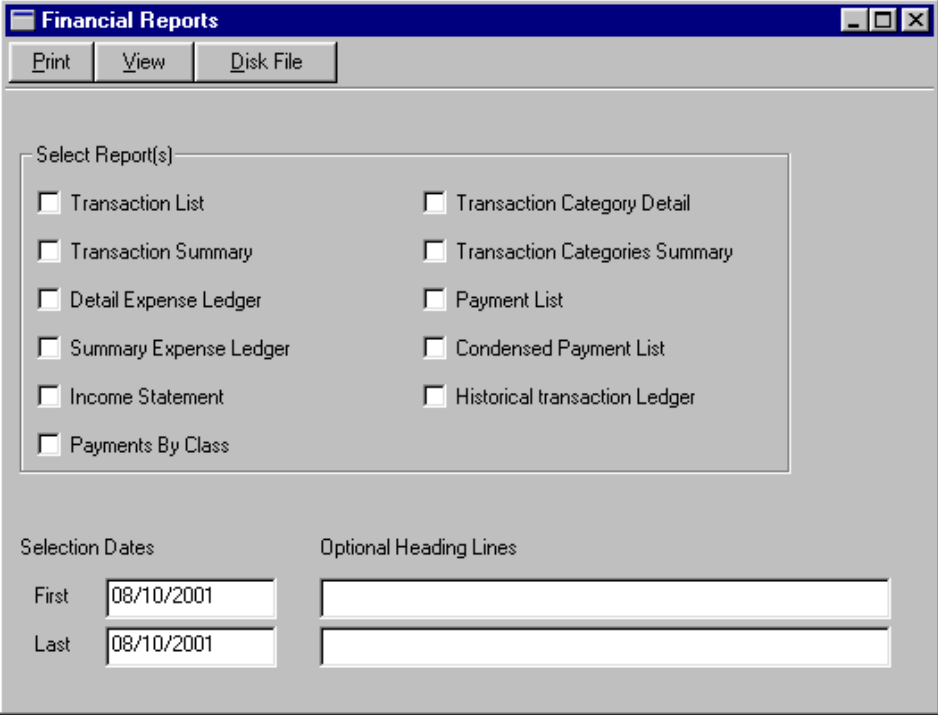
**Selecting Records:** You can use the Student, Family and Student Category fields to indicate which records you wish to include in your report. You may make a selection in some or all or none of these fields.

**Include:** The Include group is only active when you have selected Student Contact List from the menu. Check any or all or none of the boxes in this group to specify the information you want printed on your student contact list. If none of the boxes are checked, the student list will show only the student names.

**New Page for Each Student Contact:** Check this box if you want to start printing each student's information at the top of a new page.

# Financial Reports

The window will be displayed when you select Financial Reports from the menu. You may select as many of these reports as you want to print at one time by checking the boxes next to each report.



All of the financial reports require a beginning and ending date to select the financial transactions that are to be included in the report. Be sure and enter a First and Last Selection date to indicate the date range you want to be covered by your report.

## Other Reports

---

This window is displayed when you select Other Reports from the menu. You may print as many of these reports as you want to at one time by checking the boxes next the reports you want.

The screenshot shows a window titled "Miscellaneous Reports" with a menu bar containing "Print", "View", and "Disk File". Below the menu bar is a section titled "Select Report(s)" containing a list of categories with checkboxes:

- Music List
- Billing Problems
- Students
- Not Enrolled Students
- Families
- Schedule List
- Classes
- Holidays List
- Transactions
- Expense Categories
- Student Contacts
- Instructors
- Family Contacts

Below the list is a section titled "Selection Dates" with two input fields: "First" (empty) and "Last" (containing "08/01/2001").

At the bottom is a section titled "Optional Heading Lines" with two empty text input fields.

The Schedule List and Holiday List reports require a beginning and ending date. For these reports be sure to enter a First and Last Selection date to indicate the date range you want to be covered by your report.

## Costume Ordering

This window is displayed when you select the option on the Reports menu to prepare the costume order form. Preparation of the costume order information involves measurements from the student windows, costume and enrollment information from the class records, costume sizing and pricing information from the costume records and the sizing information from size charts. As part of preparing the order information you can optionally post student costume charge amounts to the families' accounts.

**Post Costume Charges:** If you check this box, any student charge amounts on the costume records will be automatically charged to the families accounts when the costume ordering information is printed. Usually you will want to view or print the order information without the box being checked in order to check the order for accuracy before printing the order form with the box being checked.

**Costume Sizing and Ordering Report**

Print View Disk File

Report Options More Options Sort Options

Class

Class Category

Location

Instructor

Select Dates

First:

Last:

Post Costume Charges

Optional Heading Lines

New Page for Each Class

Include:

- Location
- Instructor
- Days/Times Taught
- Billing Information
- Classs Categories
- Costume
- Student Information:
- Enrolled Students
- Waiting Students
- Pre-Registered Students
- Parents Names
- Address
- Telephone Numbers
- Emergency Information
- Measurements
- Balance Due

## Printing Labels

Prior to printing labels, you will need to select the label printing options on the general information window. To get to this window, go to Data Entry, General Information and Printing Options.

The screenshot shows a window titled "General Information" with a "Save" button in the top left. The "Printing Options" tab is selected. The window is divided into several sections:

- Page Margins (Inches):** Left (0.500), Right (0.500), Top (0.250), Bottom (0.500).
- Label Printing Options:** Label Type (One Wide - 1" x 3.5" selected, Two Wide - 1" x 4", Three Wide - 1" x 2.5).
- Printing Font:** Courier New (selected), Default, Letter Gothic, OCR A Extended.
- Font Size:** 10.
- Labels Per Page:** 1.
- Start Printing from Top (Inches):** 0.500.
- Start Printing from Left (Inches):** 0.500.
- Orientation:** Portrait (selected), Landscape.
- Print Receipts:** Yes, No (selected).

**Label Type:** Select one wide, two wide or three wide labels based on the type of labels you are using. The most common labels sheets are three wide (three columns and ten rows).

**Labels Per Page:** Enter the number of labels per page (most commonly 30).

**Start Printing from Top:** Decrease or increase this value if the printing needs to be moved up or down to correctly fit the labels. Generally the default value of .500 inches will work.

**Start Printing from Left:** Increase or decrease this value to move the printing right or left on the labels.

**Font Size:** If the printing is too large to fit totally on the labels, reduce this value.

After making any changes on this window, be sure and click on Save to save the changes.

# Report Writer

## C H A P T E R 6

### Introduction

DanceONE's report writer lets you design your own reports, labels, forms, etc., using the information you have entered into DanceONE. For example, if you want to print a certain size of student label containing the child's name, age, address, emergency phone and emergency contact, it can be done, to your specifications, using the report writer.

You can also specify the heading for your report and the sorted order of the information appearing in the report.

### Basic Information

Use this report writer window to enter general information about your report and as a jumping off point, via the buttons along the bottom of the window, to the other report writer screens. The information on this window will need to be completed and saved before the other report windows can be accessed.

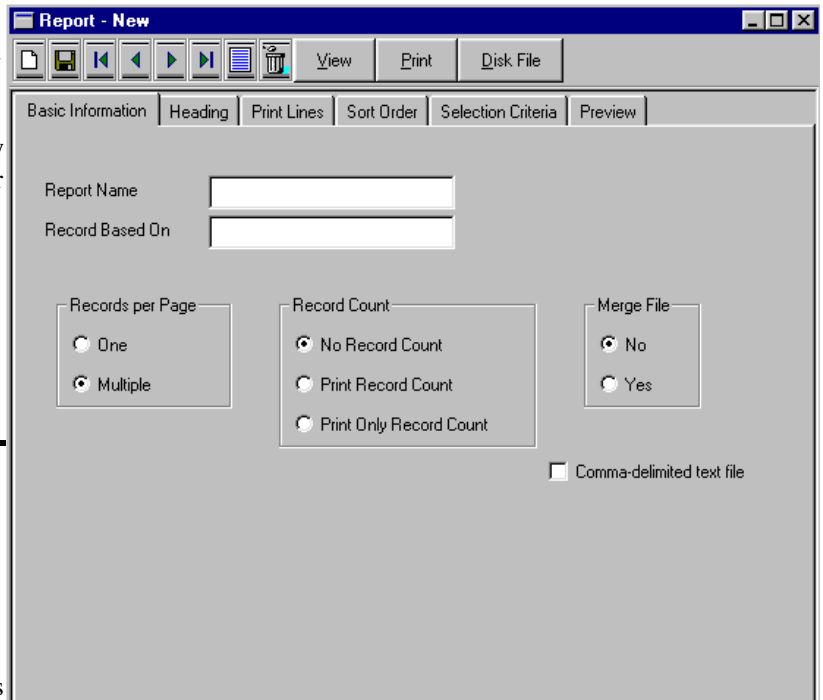
**Report Name:** Each report you design should be given a unique name. This name should usually be descriptive of what the report is.

**Record Based On:** The report must be based on a record in the DanceONE database. For example, the child, or class or transaction record. To select the record to base the report on simply hit **Enter** in the Record Based On field and DanceONE will display a list of available record types. Highlight the record you would like to use and hit **Enter** to select it.

**Records per Page:** Indicate in this box whether you want just one record printed on each page of the report or if as many records as will fit should be printed on each page. For instance, if you are printing child labels on 2 inch by 3 inch label stock, you will probably indicate that just one child record should be printed on each page. If however you are printing a child phone directory on letter size paper, you would want to indicate that multiple records be printed on each page.

**Record Count:** Use these buttons to indicate whether or not a count of the records printed should be printed at the end of your report.

**Merge File:** A merge file is typically a list of names and addresses and possibly other information that you want to merge into another document (a newsletter for example) using your word processing program. If you select yes in this box, WordPerfect mail merge codes will be appended to the end of each line and record of your report.



**Comma delimited text file** - Check this box to generate a comma delimited text file when sending the report to a disk file. If this box is not checked and the report is sent to a disk file the report information will be formatted as you indicate on the "Print Lines" tab. Comma delimited text files are generally easier to import into other programs such as spreadsheet and database programs.

## Chapter 6, Report Writer

**Note:** Unless you are using a report that has already been saved, the following tabs cannot be selected. In other words, as long as the window is titled "Report - New", these tabs will not work.

**Heading:** Selecting this tab will display a window in which you can layout the heading that will be printed at the top of each report page. It is not necessary that a heading be described for a report (mailing labels, for example, probably would not have a heading printed on each label). See the following section on "The Report Heading" for a more detailed description of how to setup the heading.

**Print Lines:** Selecting this tab will display a window in which you enter the fields to be printed as part of this report. The section below titled "Selecting Fields to Print in the Report" describes this process.

**Sort Order:** Selecting this tab will display the sorting order window. You can use this window to indicate the fields that will be used to sort the records prior to printing the report. For example, you may want to indicate that your child labels are sorted by child name or by zip code. The section below titled "Selecting the Sort Order for the Report" gives more information about this task.

**Selection Criteria:** Use this tab to indicate which records you want to include in your report.

**Preview:** Selecting this tab displays a window showing the current layout of your report. The heading is shown as well as any print fields you have selected. This window will let you quickly evaluate the layout of your report without having to print or view it.

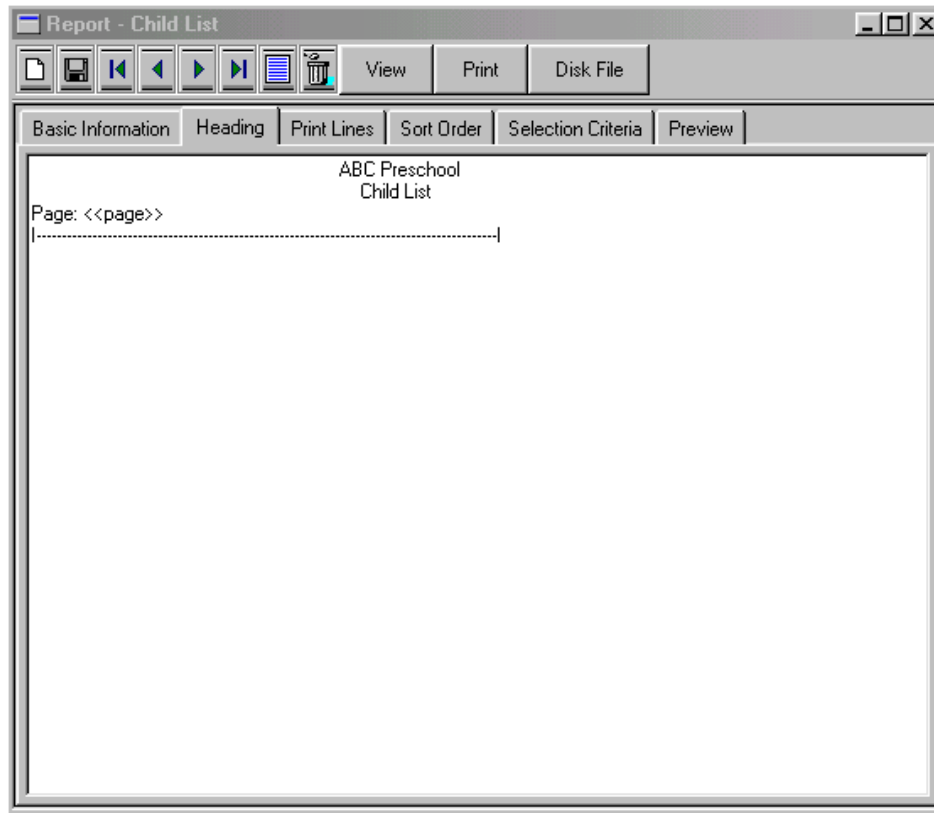
**View, Print or Disk File:** These buttons work the same way on this report writer window as they do on other report windows. See the introductory section of Chapter 5, Reports for more information on using these buttons.



## The Report Heading

Use this window to format the heading that will appear at the top of each page of your report. Since some of the reports you may want to print do not require a heading (mailing labels for instance), entering a heading is optional.

In each place the report writer encounters <<page>> or <<date>> in your heading text, it will substitute the current page number or the current date when the report is printed.

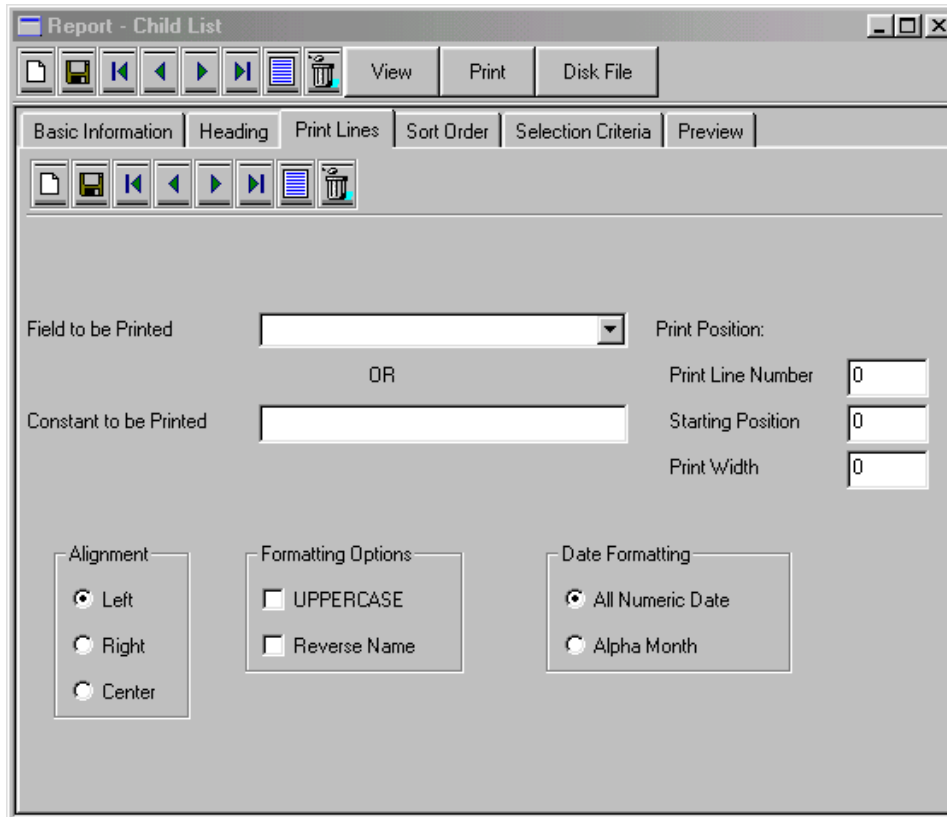


For the most part, setting up the report heading is simply a matter of typing it in on this screen the way you want it to appear on your report. What you enter on this heading window will be printed as the heading on each page of your report.

There are two keywords that you can enter in this heading window that will result in a page number or the current date being printed as part of the heading when the report is printed. These two keywords are the **page** and **date**. So that DanceONE will know that you want the page number or date printed and not just the word "page" or "date" the keyword should be bracketed by two pairs of angle brackets (<<page>> or <<date>>). It doesn't matter whether the word within the brackets is upper or lower case.

## Selecting Fields to Print in the Report

Use this window to select the fields you want to be printed as part of your report and where and how they are to be printed. A report field record should be entered on this window for every field you want to print on your report.



**Field to be Printed:** Hit **Enter** or **click on the down arrow** in this field to see a list of the fields that are available for printing as part of your report. Highlight the field you want and press **Enter** or **click** to select it. After selecting a field, hit **Tab** to move on to the next field.

**Constant to be Printed:** Enter in this field any constant information or labels you want printed as part of your report. For example, you may want the words "Birth Date" to precede the child's birth date on your report.

**Note:** The information on this window needs to be completed for every data field and constant that you want printed on your report. For the example

mentioned above you would need to complete the information on this window for the constant "Birth Date" and for the birth date field from the child record (you couldn't describe both the label and the data at the same time).

**Print Line Number:** The information relating to each record to be printed as part of your report can be printed on as many lines as you want. As an example, if you are printing a child information label, you may want the student's name on line 1, birth date and sex on line 2, emergency contact on line 3 and emergency phone number on line 4. You could then skip to line 7 and print the family name and address on lines 8, 9 and 10.

A valid line number should be 1 or greater.

**Starting Position:** Enter in this field the horizontal print column in which printing of the field you selected above should begin. Selection of this number should be done in view of the print width number and alignment option discussed below.

**Example:** You want to print only the child's name on the print line. The print line is 80 columns wide with a 10

column left and 10 column right margin, leaving 60 printable positions. The most straightforward way of centering the child's name on the print line would be to enter a starting position of 1, print width of 60 and center as the alignment option.

**Print Width:** Enter in this field the width or number of print columns in which the field should be printed. This print width can be greater or less than the width of the data that will be printed. You could, for example, enter a print width of 2 for the child's name. In this case, only the first two letters of the child's name would be printed. If the print width you enter is greater than the width of the data to be printed, spaces will be added to fill out the print width.

**Alignment:** The alignment options determine where, within the print area delineated by the starting position and print width, the data will be positioned for printing. The alignment options are centered, left justified or right justified.

**Formatting Options:** At the present time there are only two general formatting options available; uppercase formatting and name reversing.

If you check the **UPPERCASE** option all lowercase letters in your data will be converted to uppercase before printing.

If you check **Reverse Name** and the field being printed is a name field entered as Last name, First name, the first name will be placed first for printing.

**Date Formatting:** If the field being printed is a date field, you have three options for formatting the field for printing.

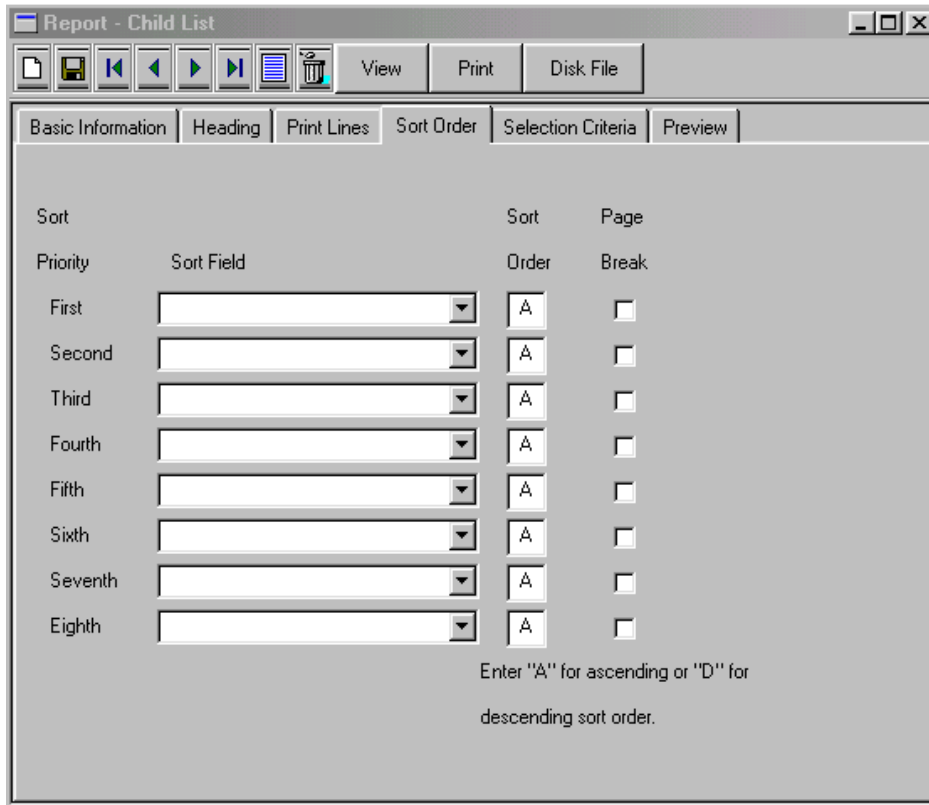
All numeric date	01-01-1993
Alpha month	January 1, 1993
Date and Weekday	Friday Jan. 1, 1993

## Sort Order

Use this window to indicate which fields, if any, should be used to sort your records before they are printed. Up to eight different fields can be selected as sort fields for each report.

**Sort Field:** Hit **Enter** or **click the down arrow** in any of the sort fields to see a list of fields available to be used for sorting. Highlight the field you would

**Sort Order:** Enter either **A** or **D** in this field to indicate ascending or descending sort order respectively. If you are sorting in ascending order the smallest numbers, earliest dates or alphabetically earlier fields will be sorted first. Descending of course, is the opposite. If you are sorting a child list by birth date, ascending order will list the oldest children first (the earlier birth dates) and descending will list the youngest children first. Ascending order is the default.



Sort Priority	Sort Field	Sort Order	Page Break
First		A	<input type="checkbox"/>
Second		A	<input type="checkbox"/>
Third		A	<input type="checkbox"/>
Fourth		A	<input type="checkbox"/>
Fifth		A	<input type="checkbox"/>
Sixth		A	<input type="checkbox"/>
Seventh		A	<input type="checkbox"/>
Eighth		A	<input type="checkbox"/>

Enter "A" for ascending or "D" for descending sort order.

like to select and hit **Enter** or **click to select**. Use the **Tab** key to move to the next field.

Up to eight sort fields can be specified for a report. The sort fields should be specified in order of their sorting priority. The lower priority sort fields will be sorted before the higher priority sort fields. For example if you want a child list sorted by zip code and alphabetically by child name within the same zip code you would specify the zip code as the first priority sort field and the child name as the second priority sort field.

Sort fields you specify need not be fields that you are printing in the report. You could, for example, sort the child records by family name but then not include the family name among the fields to be printed on the report.

# Billing

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## C H A P T E R 7

### Introduction

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By using the billing functions in DanceONE you can automate what is probably one of the most time consuming and error prone activities you do as the owner of a dance business. The billing functions in DanceONE are designed to be flexible enough to accommodate the wide variety of billing procedures commonly used by dance teachers.

DanceONE is designed around a double-entry accounts receivable or billing system. This means that in your family accounts both charge and payment (or credit) transactions should be entered. At any time, the amount owed to you by a family is the beginning balance entered on the family window, plus all charge transactions posted to the family's account, less any payment or credit transactions posted to their account.

DanceONE provides a variety of billing methods that are designed to automate the calculation and posting of charges and discounts to the families' accounts. Typically you will enter payments and other credits on the transaction window (see Transactions in Chapter 3).

**Billing Methods:** DanceONE supports a number of different billing methods. You may select a default billing method that applies to all classes/students in your program. This method is selected on the General Billing Information window discussed in this chapter.

In addition to the default billing method you may specify different billing methods for different classes (see the section on Classes in Chapter 3).

The typical billing cycle used in DanceONE is as follows:

1 - Select the "Calculate and Post Charges" option on the billing menu to have DanceONE automatically calculate and post charges for tuition, costumes and other. There is no set time of the month for this to be done and your selection of a date to calculate charges will be determined by not only when you want the charges to be posted to the families balances but also by the billing method you have chosen.

When you select the option to calculate and post charges you will be given a variety of options for selecting just the charges or discounts you want to calculate and post. You have complete freedom to run this option whenever you need to accommodate any different billing cycles (weekly, monthly, quarterly, etc) that you use in your business.

For more information on this option see the section in this chapter titled Calculate and Post Billing Transactions.

2 - Enter payments, credits and manually entered charges as necessary during the billing period.

3 - If you have decided to have DanceONE calculate late charges, run the late charge calculation option before printing statements.

4 - Print billing statements.

# General Billing Information

once per period (weekly, monthly, etc) to automatically calculate and post the charges.

**Bill by Class Held:** The amounts entered on the class window will be charged to the families for each time this class is held. Before DanceONE can automatically calculate charges using this billing method, the class schedule will need to be built (see the Scheduling section in Chapter 3).

When you select this billing method, the Calculate and Post Charges option on the billing menu can be run as often as you wish. If your classes are typically scheduled once per week, you could calculate and post charges once per week or less frequently.

**Bill by Class Attended:** The amounts entered on the class window will be charged to the families of enrolled students each time the student attends the class.

In order to bill by this method, student attendance has to be kept using the attendance functions (see the Attendance section in Chapter 3).

Like the Bill by Class Held method discussed above, when you choose to bill by class attended you are able to calculate and post charges as often (or as infrequently) as you wish. DanceONE will keep track of the last charge calculation date and will automatically charge for all classes attended between that date and the new billing date you specify.

**Bill from the Regular or Hourly Charge Table:** Using this option you can enter amounts in the charge table that will be charged to every student enrolled in a class that is currently being taught. Charge table amounts are charged as tuition charges. The amount that each student is charged is dependent on the number of currently taught classes that the student is enrolled in or the total time of the classes the student is currently enrolled in.

Selecting the first option on the Billing Menu will display the General Billing Options window shown above. Use this window to indicate your billing and late charge methods before you use any of the other DanceONE billing functions.

**Billing Method:** You may select a default billing method in this box. This billing method will be used for class based billing if you do not select a specify method for a class. In other words, you can specify a billing method here that applies to most of your class and then specify a different method on the class window for some of your classes.

**Periodic Billing:** The tuition, costume and other amounts you have entered on the class window will be charged to the families of all students currently enrolled in the class each time you Calculate and Post Billing Transactions and select Periodic Class Window Charges to post. The charge calculation and posting option on the billing menu should be run

**Late Charge Options:** DanceONE will automatically calculate late charges based on the information you provide in this window. If you do not want DanceONE to calculate late charges, be sure that the "None" button in the Late Charge Method box is selected. If you select "None", all other late charge information on this window will be ignored by DanceONE.

Keep in mind that a late charge will be calculated for a family only if the Assess Late Charge check box is checked on the second family window.

**Fixed Dollar Amount:** Choose this option if you want DanceONE to charge a fixed amount when a family's account is past due. If you select this option be sure and enter an amount in the Late Charge Amount field on this window.

**Percent of Late Amount:** Choose this option if you want DanceONE to calculate a late charge based on a percent of the amount past due. If you choose this option, be sure and enter a percent in the Late Charge Percent field on this window. Also if you select this method you may want to specify an amount in the Minimum Late Charge Amount field.

**Late Charge On:** Indicate by checking the boxes by Tuition, Costume and Other which balances you want to be subject to a late charge. If none of the boxes are checked, DanceONE will not automatically calculate late charges.

**Late Charge Amount:** Enter an amount in this field if you selected the Fixed Dollar Amount as a late charge method. If you selected the percent method, any amount in this field will be ignored.

**Late Charge Percent:** Enter a percent in this field if you selected the Percent of Late Amount as the late charge method.

**Number of Days till Late:** Enter the number of days after which an unpaid charge will be considered late for purposes of automatically calculating a late charge. For example, if you bill by the month and calculate and post your monthly charges on the 1st, and consider any unpaid balance late after the 15th, you would enter 15 in this field. A typical number in this field might be 15 or 30 or 60 days.

**Minimum Late Charge Amount:** Any amount you enter in this field is used only if you select the Percent of Late Amount method for calculating late

charges. Enter an amount in this field that will be charged for the late charge is the percent calculation arrives at a number smaller than the amount entered here. You might want to enter \$.50 or \$1.00 or some other amount as a minimum.

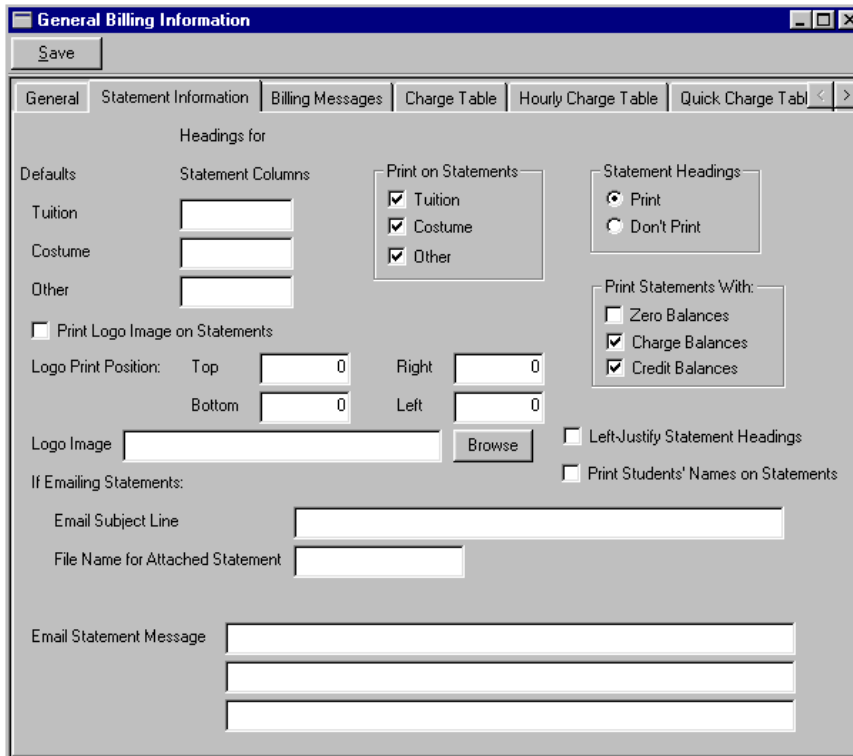
**Minimum Balance for Late Charge:** Indicate here the minimum past due amount that should exist before a late charge is posted to the account. For example, you may not want to post a late charge to accounts that have a \$5.00 or less past due amount.

**Print Only Statements With a Late Charge:** Check this box if you only want statements printed if they have a late charge posted to them in the date range you specify to be included when you print the statements.

**Maximum Charge Amounts:** Specifying a maximum family or student charge will limit any single family's or student's total charges to no more than that amount for each billing period.

# Statement Printing Options

**Statement Printing Options:** Using this window you may customize your billing statement printing. In addition, you will have the option to further customize the printing process at the time you print the statements (see Chapter 5, Reports).



print a logo you would select the “Don’t Print” button in the Statement Headings checkbox.

**Top, Bottom, Right, Left:** These fields let you specify the position on the page for the logo to print. You should start counting at 0,0 in the upper left hand corner of your page. The numbers represent pixels or dots on your printer. Most printers will print at 300 or 600 dpi (dots per inch). If your printer is set to print at 600 dpi and you want the

upper left corner of your logo to print an inch down from the top of the page and an inch in from the left hand margin you would enter 600 in the top and left fields. You should also locate the bottom and right side of your logo starting at 0,0 at the upper left corner.

**Logo Image:** Type in the location of your logo image file or browse to find it.

**Left-Justify Statement Headings:** If this box is checked the statement heading (your business name and address) is printed at the left margin of the paper. This is useful if you have envelopes with a window for your address.

**Print Students’ Names on Statements:** If this box is checked, the students’ names will print on the billing statements to the right of the parent’s names and address.

**Headings for Statement Columns:** The default column headings for billing statements are “Tuition”, “Costume” and “Other”. You can override the default headings by entering your headings in these fields.

**Statement Headings:** If you select Print statement headings, you business name and address will be printed at the top of each statement page.

Typically you would select Don’t Print statement headings if you are printing statements on pre-printed letterhead.

**Print Logo Image on Statements:** Check this box if you have a logo that you want to have DanceONE print a logo on your billing statements. The logo would need to be in a standard image file format such as .jpg, .tif, .gif, etc. Usually if you want to

**Print on Statements:** Use these check boxes to indicate which columns (tuition, costume, and/or other) you wish to have printed on your statements. By default, all three boxes are checked. You could use these check boxes to print statements showing just costume amounts or to print tuition and other amounts but not costume amounts..

**Print Statements With:** Select the type of statement balances you want printed by checking the appropriate boxes in this group. If you want all statements printed you should check all three boxes.

**Email Information:** If you plan on sending statements via email, you should complete these fields.



**Email Subject Line:** Enter here the email subject line for the statement email. For example, “Dance Studio Billing for September”.

**File Name for Attached Statement:** The email statement that is sent to you families contains the amount due and a brief message (see below). The printable statement is attached to the email message as a text file. You can specify in this field the name of the attached text file. For example, “August Bill”.

**Email Statement Message:** Enter in these fields a brief message that will be included in your email statement.

## Billing Statement Messages

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Any **Statement Message** you enter on this window will be printed at the bottom of your billing statements.

The **Late Charge Message** will be printed on any billing statements covering a billing period during which the family was assessed a late charge.

Use of the messages on this window is optional. The messages can be changed or removed at any time.

The screenshot shows a software window titled "General Billing Information" with a "Save" button. Below the title bar is a tabbed interface with tabs for "Billing Messages", "Charge Table", "Hourly Charge Table", "Direct Withdrawal", and "D/W Banks". The "Billing Messages" tab is active. It contains two sections: "Statement Message" and "Late Charge Message". Each section has five horizontal text input fields for entering messages.

## Billing Charge Table

**Charge Amounts:** Enter the total charge for the specified number of classes. The charge table can handle a class count of up to 20 classes.

This charge table window and the hourly charge table window described in the next section allow you to charge a tuition fee based on the number of classes or number of hours taken by each student or by all the students in each family.

**General Billing Information**

Save

General | Statement Information | Billing Messages | **Charge Table** | Hourly Charge Table | Quick Charge Table

Billing Based On:

# of classes taken by a student

# of classes taken by all students in a family

Family Discount Plan:

Student Discount Plan:

Number of Classes	Charge Amount	Number of Classes	Charge Amount
1	0.00	11	0.00
2	0.00	12	0.00
3	0.00	13	0.00
4	0.00	14	0.00
5	0.00	15	0.00
6	0.00	16	0.00
7	0.00	17	0.00
8	0.00	18	0.00
9	0.00	19	0.00
10	0.00	20	0.00

See the Calculate and Post Billing Transactions section below for information about posting charges based on the charge tables.

**Billing Based On:** The class count used to select a charge amount from the charge table can be based on either 1) the number of classes taken by each individual student or 2) the number of classes taken by all the students in each family.

**Family and Student Discount Plans:** In addition to the discounts built into the charge table rates, you may also specify a student or family discount plan to further customize your billing.

## Hourly Charge Table

This hourly charge table window allows you to charge a tuition fee based on the number of hours taken by each student or by all the students in each family. Hours are calculated by start and end times entered on the class window.

amount up to 1 hour, then charge increasing amounts for each 15 minute interval from 1 hour to 4 hours and then a flat charge for anything above 4 hours.

**Charge Amount:** Enter the total charge for the specified number of hours:minutes.

Total Time	Charge Amount	Total Time	Charge Amount	Total Time	Charge Amount	Total Time	Charge Amount
0:30	0.00	5:30	0.00	10:30	0.00	15:30	0.00
1:00	0.00	6:00	0.00	11:00	0.00	16:00	0.00
1:30	0.00	6:30	0.00	11:30	0.00	16:30	0.00
2:00	0.00	7:00	0.00	12:00	0.00	17:00	0.00
2:30	0.00	7:30	0.00	12:30	0.00	17:30	0.00
3:00	0.00	8:00	0.00	13:00	0.00	18:00	0.00
3:30	0.00	8:30	0.00	13:30	0.00	18:30	0.00
4:00	0.00	9:00	0.00	14:00	0.00	19:00	0.00
4:30	0.00	9:30	0.00	14:30	0.00	19:30	0.00
5:00	0.00	10:00	0.00	15:00	0.00	20:00	0.00

See the Calculate and Post Billing Transactions section below for information about posting charges based on the charge tables.

**Billing Based On:** The total hours used to select a charge amount from the charge table can be based on 1) the number of hours taken by each individual student or 2) the total hours taken by all students in each family.

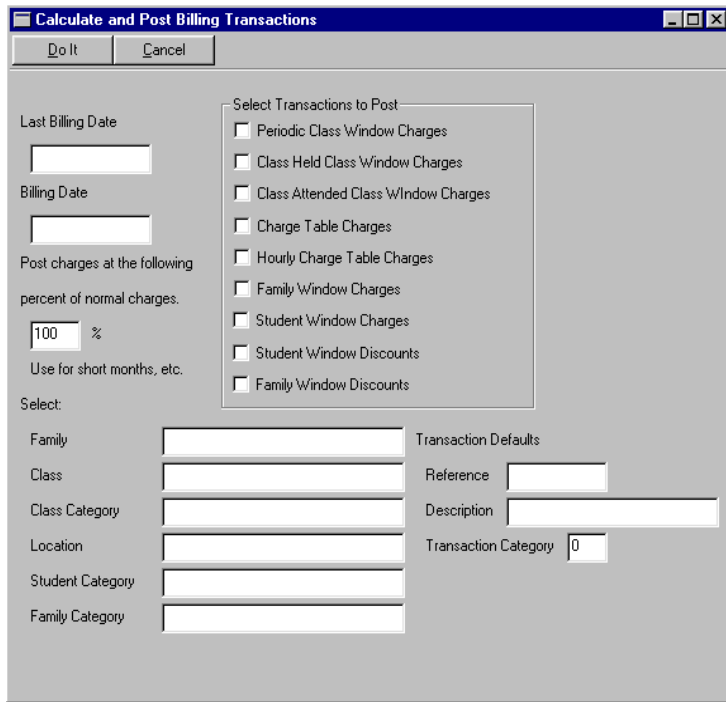
**Family and Student Discount Plans:** In addition to the discounts built into the charge table rates, you may also specify a student or family discount plan to further customize your billing.

**Total Time:** Enter in this field the hours:minutes up through which the amounts in the charge field should be charged to the family's account. The intervals between each charge level do not need to be the same. For example, you could charge a certain

# Calculate and Post Billing Transactions

Use this window to calculate and post billing transactions (charges and discount credits) to your family accounts.

See the section on Billing Methods above to determine how often you need to calculate charges.



**Last Billing Date:** This field will show the last date you calculated charges. The only exception is the first time you use this function, in which case, this field will contain the current date. If this is the first time, ignore the last billing date and specify the correct current billing date.

**Billing Date:** The purpose of the date you specify in this field differs depending on the billing method you have selected.

If you have selected **periodic billing**, this date will be the date of the charge transactions for the period. This could be the 1st if you charge for classes as of the first of the month, the last day of the month or any other day. It is a good idea to be consistent in your choice of a date from period to period.

If you are having DanceONE automatically calculate late charges, keep in mind that the date you specify in this field will affect the late charge calculations.

If you have chosen to bill by **class held or attended**, the date you specify in this field will not be used for the charge date. The date the class was held or attended will be used. With these billing methods, the last billing date and the current billing date indicate a range of dates within which all scheduled or attended classes are to be charged for.

**Note:** When billing by the class attended, be sure that all attendance records are entered for the billing period before the charges are calculated. Attendance records for the billing period that are entered after charges are calculated for the period will not be charged for.

**Percent of Normal Charges:** The percentage entered in this field will be applied to all charges posted in the current billing calculations. This can be useful during holiday months or other billing periods when all charges need to be reduced to a certain percentage (75% or 50% for example) of the normal monthly charges.

**Select Transactions to Post:** Check these boxes to indicate which types of charges and/or discounts you want to calculate and post this time through. You may select any or all of the boxes. The charges that actually get calculated and posted are determined by the default billing method selected on the General Billing Information window (see this chapter), by any billing methods selected for individual classes (see Classes in chapter 3) and by any charges or discounts entered for individual families and students (see Families and Students in chapter 3).

**Select:** You can further customize the billing process by using the Family, Class, Class Category, Location, Student Category and Family Category fields. You may make a selection in none or all or some of these fields. For example, you might want to calculate and post charges just to families in a certain family category in a certain location.

**Transaction Defaults:** You can enter into these fields a transaction reference, description or category that will be used with all transactions posted in the current billing calculations. For example, you may want a default transaction description of “January Tuition” to be used when doing your January billing.

**Do It:** Select the Do It button (**Alt-D**) to start calculating charges for the specified billing period.

## Group Transactions (One-Time Charges)

Use this window to post group transactions or one-time charges. These might be registration or recital or costume fees or any other charge that is not posted in your regular billing cycle.

For additional explanation of the Type, Date, Reference, Description, Amounts and Categories fields see the section on Transactions in Chapter 3.

**Create Transactions For:** Select a single option from this group to indicate how the transaction is to be posted.

**Families with Students:** Select this option if the transaction is to be posted a single time to any family that has students.

**Families with Enrolled Students:** Same as the option above except at least one of the students in the family must be enrolled in a class.

**Students:** The transaction will be posted once for every student. If there are 3 students in a family, the transaction will be posted to the family's account three times.

**Enrolled Students:** Same as the option above except the transaction will only be posted to the family's account for each student currently enrolled in a class.

**Students (1 per class):** The transaction will be posted to the family's account one time for each class a member of the family is currently enrolled in. If three students in the family are taking seven classes between them, the transaction will be posted seven times to the family's account.

**Select:** You can further customize the group transaction process by using the Class, Class Category, Location, Student Category and Family Category fields. You may make a selection in some or all or none of these fields. For example, you may have a family category for your team members and you would like to charge all team families at a specific location an upcoming competition fee. You would simply specify the location and the family category.

# Quick Charges

Use this window to quickly calculate and post charges that are not easily accommodated by other billing methods or that are different each billing period and thus not easily accommodated by student or family window charges.

the child is not attached to a family record, the family name will show "Student is not part of a family" and no charge can be posted.

**Charge Information:** Enter in these fields the Date, Reference and Description information for the charge to be posted. For additional information about these fields see the section in Chapter 3, titled "Transactions".

**Charge Table Number:** If you want to calculate and post a charge based on the information you have entered in the charge table, enter the charge table number to the left of the description and charge amount you wish to use. This will be a number between 1 and 16.

**Quantity:** Enter the quantity of charge table items in this field.

The charge amount from the charge table and the quantity will be multiplied together to calculate the amount of the charge that will be posted to the family's account.

**Amount:** If you do not want to use the charge table you can simply enter the transaction amount in this field and post the charge.

**Charge Table:** If you have a number of standard charges that you will be using, you can enter each charge description and charge amount on the charge table.

The charge table number (1 - 16) to the left of each charge description will be used along with a quantity to calculate the charge to be posted.

If you will be using the same charge table amounts many times, enter the charge table as explained in the next section and then use the **Select a Charge Table** button on this window to retrieve the charge table descriptions and amounts.

**Student and Family Names:** The child and family name to which the charge is to be posted is displayed. To select a different child use the tool bar buttons for First, Last, Next, Previous and List. If

**Post Charge Button:** Select this button to calculate and post the charge once the charge information is completely entered. The charge will be posted to the family whose name is displayed.

**Select a Charge Table:** Select this button to display a list of charge tables you have entered (see the next section). To select a charge table, highlight the name of the table and hit **Enter**. The information from the charge table will be displayed in the description and charge fields.

**Blank Charge Table:** Select this button to erase all the charge table description and charge amount fields.

**"Transactions" button:** Select this button to display the transaction window and enter a payment for the

family currently selected on the quick charge window.

## Charge Tables for Quick Charges

Use this window to enter charge tables for use with the Quick Charge window described in the previous section. This window is found by selecting “General Billing Information” on the Billing menu.

Charge Table Name

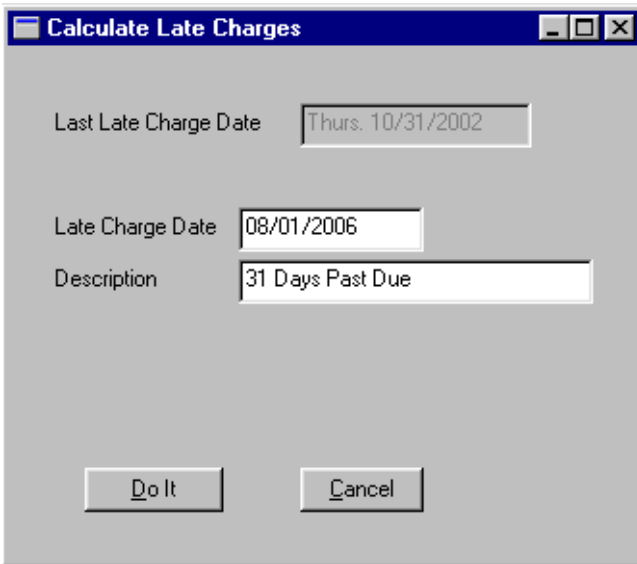
No.	Description	Charge	No.	Description	Charge
(1)	<input type="text"/>	0.00	(9)	<input type="text"/>	0.00
(2)	<input type="text"/>	0.00	(10)	<input type="text"/>	0.00
(3)	<input type="text"/>	0.00	(11)	<input type="text"/>	0.00
(4)	<input type="text"/>	0.00	(12)	<input type="text"/>	0.00
(5)	<input type="text"/>	0.00	(13)	<input type="text"/>	0.00
(6)	<input type="text"/>	0.00	(14)	<input type="text"/>	0.00
(7)	<input type="text"/>	0.00	(15)	<input type="text"/>	0.00
(8)	<input type="text"/>	0.00	(16)	<input type="text"/>	0.00

**Charge Table Name:** Enter a descriptive name for the charge table in this field.

**Descriptions and Charges:** Enter the descriptions and charge amounts for the different charges in the charge table. For more information about how the descriptions and amounts are used see the previous section on Quick Charges.

## Calculating Late Charges

Use this window to have DanceONE automatically calculate late charges. Naturally, it is important that you enter all payments received before calculating late charges.



The screenshot shows a dialog box titled "Calculate Late Charges". It has a standard Windows-style title bar with minimize, maximize, and close buttons. The dialog contains three text input fields. The first is labeled "Last Late Charge Date" and contains the text "Thurs. 10/31/2002". The second is labeled "Late Charge Date" and contains "08/01/2006". The third is labeled "Description" and contains "31 Days Past Due". At the bottom of the dialog, there are two buttons: "Do It" and "Cancel".

Late charges will not be calculated for a family if the Assess Late Charge check box is not checked on the second family window.

**Late Charge Date:** The date you enter in this field indicates the cut-off date for the late charge calculation (payments and charges dated later than this date will not be considered). This date is also used as the transaction date for the late charges.

**Description:** Enter a description for the late charge transactions that will be posted.

**Do It:** Select Do It after entering the late charge date and DanceONE will calculate late charges.



## Printing Statements

Use this window to print either Billing Statements with Detail Transactions included or Billing Statements with Balances only. DanceONE does not do any updating of the family or transaction records when the statements are printed. This means that you can print statements as often as you want and whenever you want. If you notice a problem on the billing statements (for example a payment that is not in the computer) simply fix the problem and then print the statement(s) again.

**Beginning and Ending Dates:** If you are printing statements with balances only, the beginning date will be ignored and the statements will show any balances due as of the ending date.

If you are printing statements with detail transactions, the statement will show balances as of the beginning date, any transactions between the beginning and ending date, and balances as of the ending date.

**Selecting Records:** You can use the Family, Family Category, Class, Location and Instructor fields to indicate which families statements you wish to print. You may make a selection in some or all or none of

these fields. Leaving all the fields blank will select all families.

You may also select statements to print based on the families' current account balance. Check the appropriate box or boxes for Charge Balance (they currently owe), Credit Balance, Zero Balance or Tuition, Costume or Other Balance. As an example, you may want to print billing statements only for those families that current have a tuition balance due. In this case check only the Tuition Balance Box.

**Printing:** Billing statements, like other DanceONE reports, can be viewed on the screen, sent to a disk file or sent directly to the printer by selecting the appropriate option from the window tool bar.

**Email Statements:** In addition to printing billing statements, they can also be sent via email. Before sending email statements, you should complete the information on the General Billing Information window relating to email statements (see Statement Options in this chapter). To email statements select the Email button on the tool bar.

Email statements will be sent to families for whom an email address has been entered. After the statements have sent, the report view window will display a report showing the families who were sent an email statement as well as the families who were not. This report can be viewed or printed out.

To print statements for families who do not have an email address, check the "Print Only Families with No Email Address" check box on the More Options tab.

# Direct Withdrawal from Family Accounts

DanceONE provides you the capability to create a direct withdrawal file that can be electronically transmitted to your bank and entered into the Automated Clearing House (ACH) system. This will result in the withdrawal of amounts owed to you directly from your client or family bank accounts. Typically you will need to work closely with your clients to obtain their authorization and with your bank to set up the direct withdrawal procedures.

## General Direct Withdrawal Information

The screenshot shows a software window titled "General Billing Information" with a "Save" button. The "Direct Withdrawal" tab is selected. The window is divided into three sections:

- File Header Record:** Includes fields for "Sender's (Your) Name", "Sender's (Your) ID #", "Receiving Bank Name", and "Receiving Bank Transit #".
- Company/Batch Header Record:** Includes fields for "Your Company Name", "Optional Data Field", "Entry Description", and "Originating (Your) Bank ID #".
- Offsetting Entry to your Bank Account:** Includes fields for "Your Bank's Transit/ABA #" and "Bank Account #".

Use this window to enter the general information that will be necessary to create your transmittal files. You may need to work closely with your bank to obtain some of this information. There are three main types of information to be entered on this window; 1) your name and ID and your banks name and transit number to create the transmittal file header record, 2) information for the batch header record and 3) your bank's transit number and the number of the account into which the funds are to be deposited.

### File Header Record:

**Sender's (Your) Name:** Enter your company name (up to 23 characters).

**Sender's (Your) ID:** This field should contain the number "1" followed by your federal tax ID number. Enter this information without spaces or dashes.

**Receiving Bank Name:** Enter in this field the name of the bank which will be receiving the transmittal file. This will typically be your bank (up to 23 characters).

**Receiving Bank Transit Number:** Enter the transit routing number of the bank which will be receiving the transmittal file. You can get this number from the bank.

### Company/Batch Header Record

**Your Company Name:** The name of your company (up to 16 characters).

**Optional Data Field:** You may optionally enter up to 20 characters of identification information in this field. You may want to consult with your bank to determine what might be appropriate.

**Entry Description:** Describes the purpose for the entries in this batch (10 characters). If you leave this field blank, "DIRECT W/D" will be used.

**Origination (Your) Bank ID Number:** Enter in this field the first 8 digits of the transit routing number of the financial institution to which you will be sending your

transmittal file. The transit routing number consists of 9 digits. The last digit is a check digit which is not included in this field.

### Offsetting Entry to Your Bank Account

**Your Bank's Transit/ABA Number:** Enter the transit routing number of the bank at which you maintain your account into which the withdrawal amounts are to be deposited (9 digits).

**Bank Account Number:** Enter your bank account number (17 digits).

## Direct Withdrawal Bank Information

Enter on this window information about your clients/families' bank accounts from which the amounts owed to you are to be withdrawn.

General Billing Information

Save

Billing Messages | Charge Table | Hourly Charge Table | Direct Withdrawal | D/W Banks

Bank - First Bank

Bank Name: First Bank

Bank's Transit/ABA Number:

**Bank Name:** Enter the name of the bank. This name will appear on the family direct withdrawal window once the bank is selected.

**Bank's Transit/ABA Number:** Enter the 9 digit transit routing number of the bank.

## Prepare Direct Withdrawal Transmittal File

By running this option you can create the transmittal file containing the direct withdrawal information and optionally;

- print a direct withdrawal report, and
- post the withdrawal amounts as payments to your family accounts.

**Effective Date:** The date on which you want entries in this transmittal file to be settled. You may wish to consult with your bank about the amount of time required between the day you send your transmittal file and the day the entries can be settled.

**Withdrawal Amount:** Indicate whether the amount to be withdrawn is the current balance due from the family or the total charges incurred during the specified date range. If you select the “Charges Posted in Date Range” be sure and enter a valid starting and ending date.

**Print Report:** Check this box if you want to print the direct withdrawal report. The default is to print the report.

**Post Withdrawal Amounts to Family Accounts:** Check this box if you want the withdrawal amounts to be automatically posted to the family accounts as payments. The withdrawal amounts will be posted as payments dated on the effective date.

**Pre-notification Batch:** Check this box if you want to create a pre-notification batch that only includes pre-notification records. A pre-notification batch will have all zero amounts.

**Transmittal File Name:** Enter in this field the name of the transmittal file. The default name is “DIRECT”. This file will be created in your DanceONE directory. Your bank will provide you with instructions for transmitting the file to them.

**Selection Options:** Use these selection fields to select a single family or family category for processing.



