

# SCHOOL MANAGER PRO

# Instruction Manual





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## Installing the Program

From the internet:

Open your web browser and go to [www.schoolmanagerpro.com](http://www.schoolmanagerpro.com).






Click on Downloads.

A screenshot of the School Manager Pro website homepage. The logo features a colorful ribbon forming a square. The text reads "School Manager Pro" in large bold letters, followed by "4741 Central Street • Suite 331 • Kansas City • Missouri • 64112" and "Sales (816) 510-5126 • Support (816) 510-2503". A navigation menu on the left lists: Home, Downloads (with a mouse cursor over it), Training, Online Store, Message Board, Order Form, Email Us, Privacy, and Webmail. The main content area states: "School Manager Pro is the most powerful, easy to use management software for your ATA school or club! Print Testing Forms, Membership Agreements, Mailing Labels, Barcode Labels, and much more. No need to use multiple applications or perform manual calculations... Perfect forms are printed with all the appropriate data right from School Manager Pro!". A box on the right says "Free Demo Available! Request Download Link". At the bottom left are Windows and Internet Explorer icons.

This will pull up a prompt window with a login screen.

You will need a user name and password for this screen. Please call 1-800-510-6546 or email [sales@schoolmanagerpro](mailto:sales@schoolmanagerpro) to get this information.





When you are on the Index screen, click the newest folder marked with a number (not the parent directory). In this example you would chose 20060522/.

| <u>Name</u>  | <u>Last modified</u> |
|--|----------------------|
|  <a href="#">Parent Directory</a> | 17-May-2006 12:44    |
|  <a href="#">20051114/</a>        | 17-May-2006 12:44    |
|  <a href="#">20060522/</a>        | 22-May-2006 19:20    |

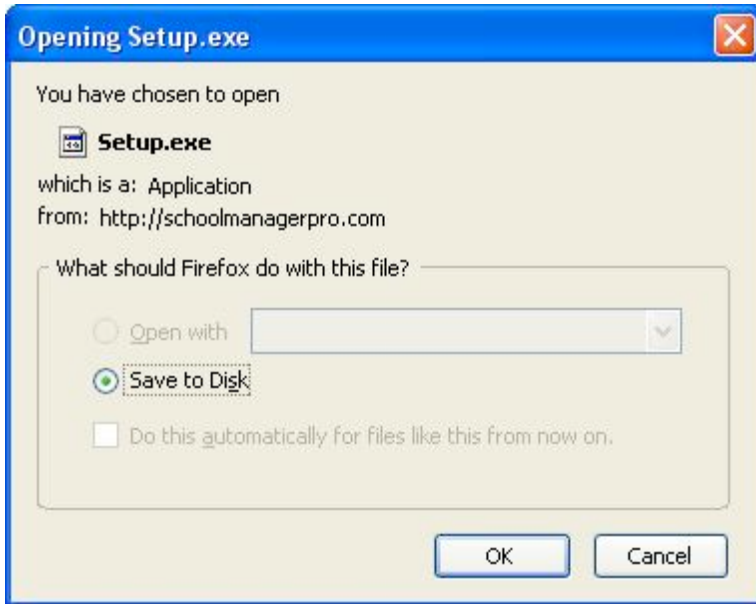
Next choose the operating system you have. For this example we will install the windows version. Download the full if you do not already have School Manager Pro. Chose upgrade if you do have it.

| <u>Name</u>  | <u>Last modified</u> |
|--|----------------------|
|  <a href="#">Parent Directory</a> | 22-May-2006 19:20    |
|  <a href="#">changes.html</a>     | 14-Nov-2005 14:31    |
|  <a href="#">mac full/</a>        | 17-May-2006 12:44    |
|  <a href="#">mac upgrade/</a>     | 17-May-2006 12:44    |
|  <a href="#">win full/</a>       | 17-May-2006 12:44    |
|  <a href="#">win upgrade/</a>   | 14-Nov-2005 14:31    |

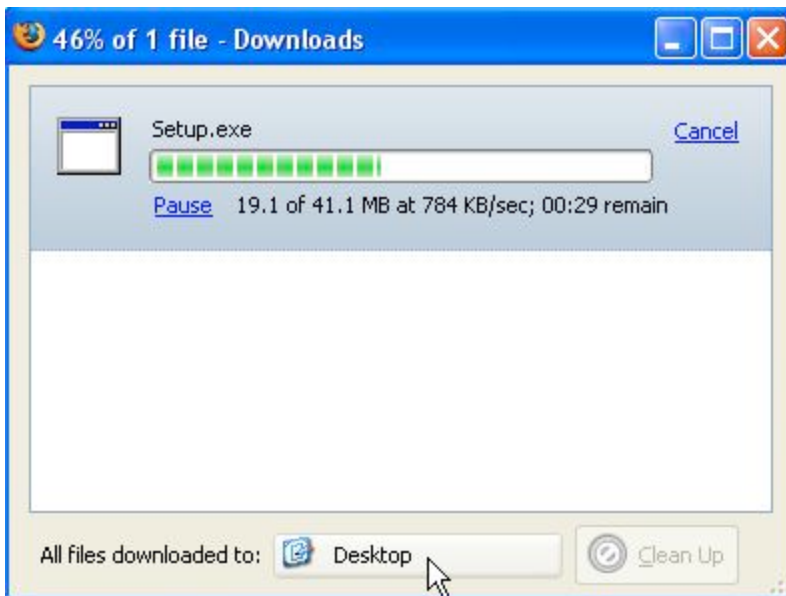
Download the Setup.exe file.

| <u>Name</u>  | <u>Last modified</u> |
|--|----------------------|
|  <a href="#">Parent Directory</a> | 17-May-2006 12:44    |
|  <a href="#">Setup.exe</a>        | 14-Nov-2005 14:31    |
|  <a href="#">changes.html</a>     | 14-Nov-2005 14:31    |
|  <a href="#">read first.html</a>  | 14-Nov-2005 14:31    |

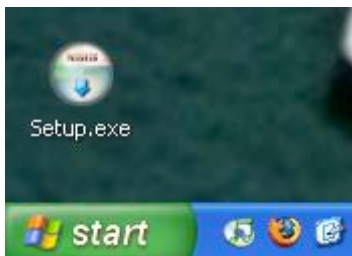
This will pull up a prompt window. Select "Save to disk". Save it to your desktop.



Wait for it to download. This may take a few minutes depending on your Internet speed.



When the download is finished, find this icon on your desktop.

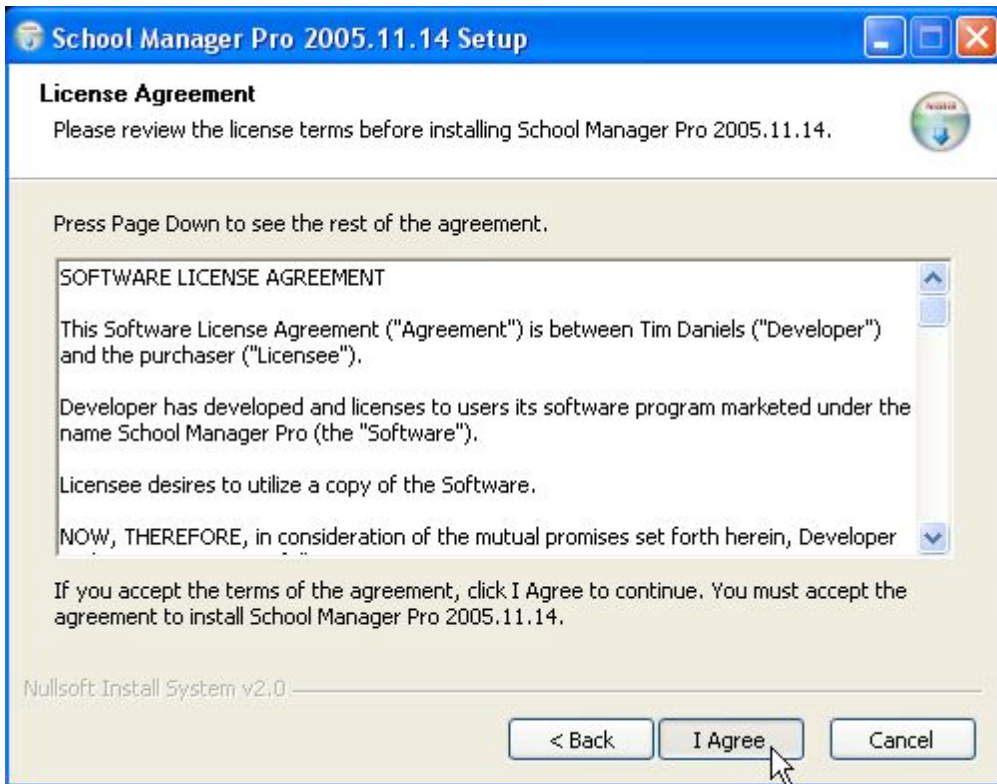


You may need “administrator privileges” to install software on your computer. If you do not know the password, check with the person who set up your computer.

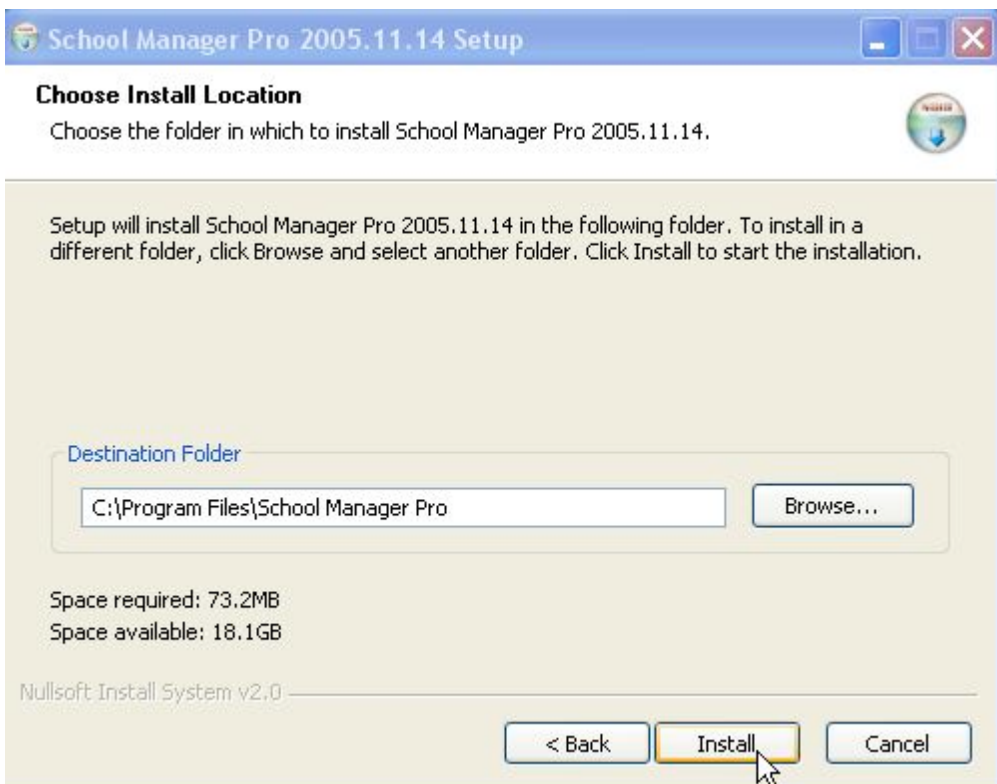
The setup wizard will start.



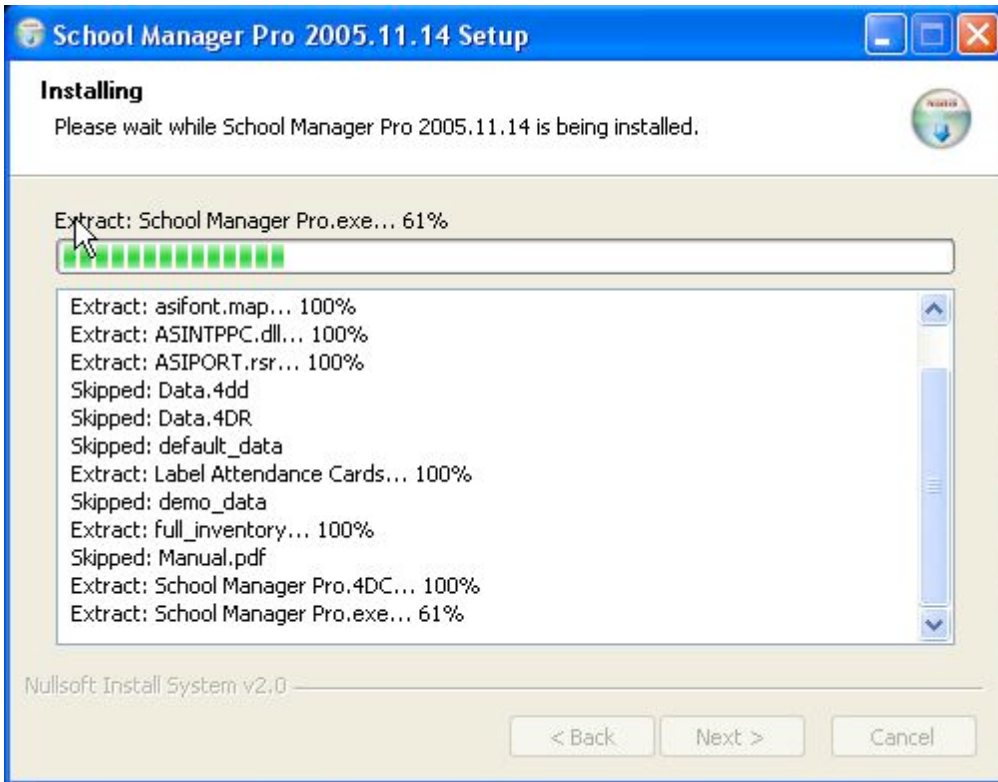
The License Agreement will pop up. When you are done reading this (or if you don't want to read it), simply click "I agree".



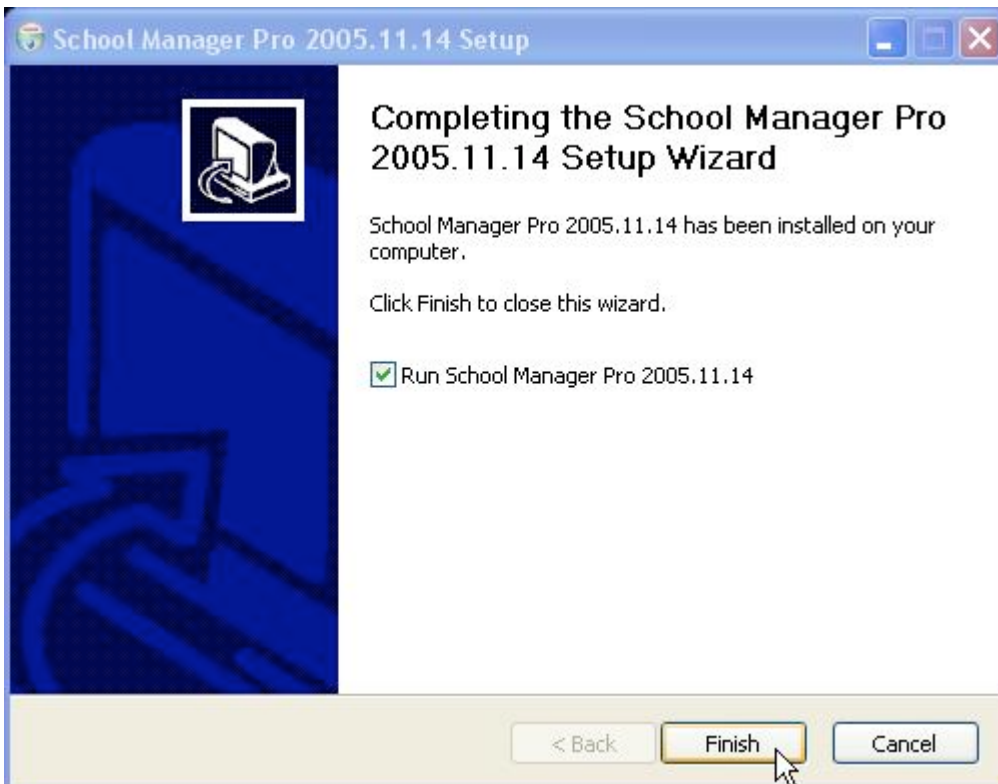
Do not change the "Destination Folder". Click Install.



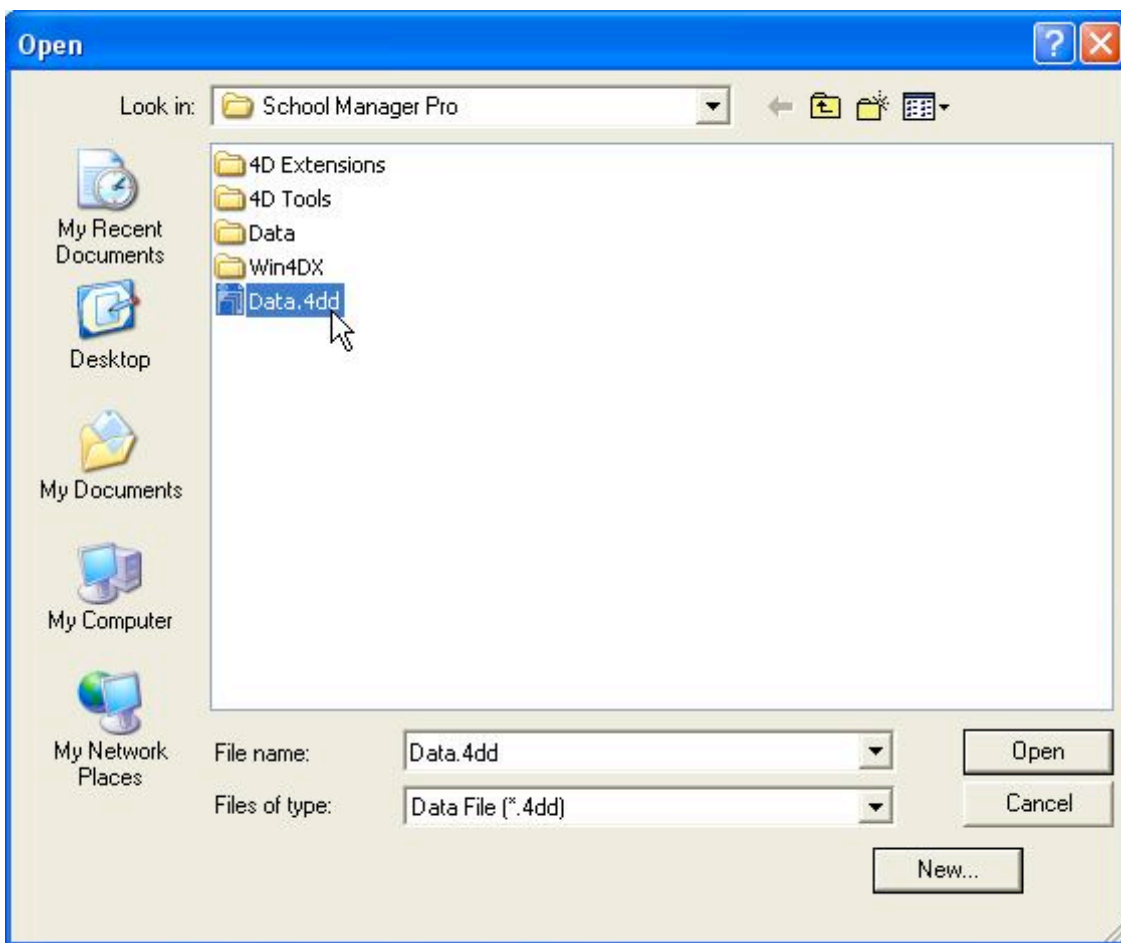
Wait for the program to install on your computer.



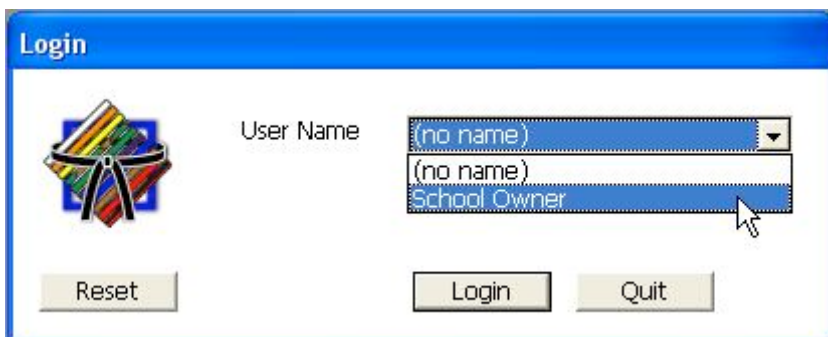
Click on the "Finish" button.



The program will start up. Let it run. The next window that appears asks you to open the data file. Click only on Data.4dd. If you do not see this file make sure the folder you are looking in is "School Manager Pro". Double click the file.



Now you can login. There are two ways to log in. One is with no name. This allows the program to run but will not allow the person using it to delete students or sales, access confidential information or change important school set-up information. This method does not require a password. If you need to have access to these things, use the drop down arrow to select "School Owner". The password is mailed to the school owner with the disk and manual. If you downloaded this manual, the school owner should call us at 1-800-510-6546 or email [sales@schoolsmanagerpro.com](mailto:sales@schoolsmanagerpro.com) to get the password.



The program will open in the demo mode. This is a 30 day trial of the School Manager Pro software. Feel free to do anything you want with this sample data. We suggest going through the operations

part of this manual and learning to make leads, students, orders, memberships, testings, and all of the other features of School Manager Pro. It is especially helpful to go through the testing portion from setting it up to updating results with this sample data. This will enable you to learn how to use the program without changing any actual data for your students. You can add your own data; however, ALL DATA WILL BE LOST WHEN YOU EXIT THE DEMO MODE. It is very important that you exit the demo mode before adding your real permanent student data!

**Before entering any real data into School Manager Pro make sure you Exit Demo Mode. Data will be lost if you enter it into Demo Mode.**

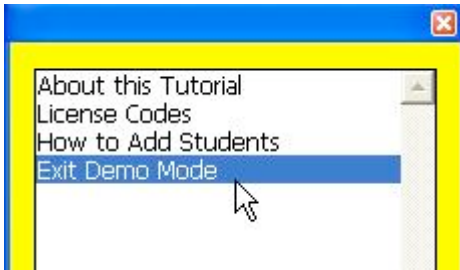


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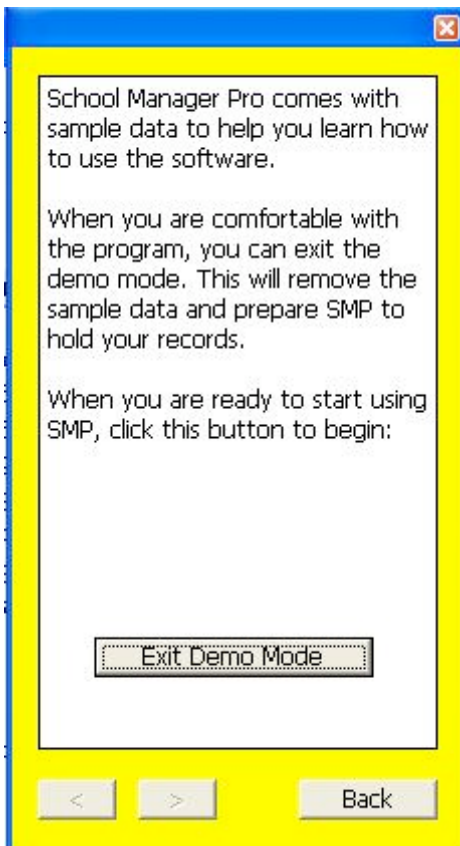
## Setup, Entering Real Data

**Before entering any real data into School Manager Pro make sure you Exit Demo Mode. Data will be lost if you enter it into Demo Mode.**

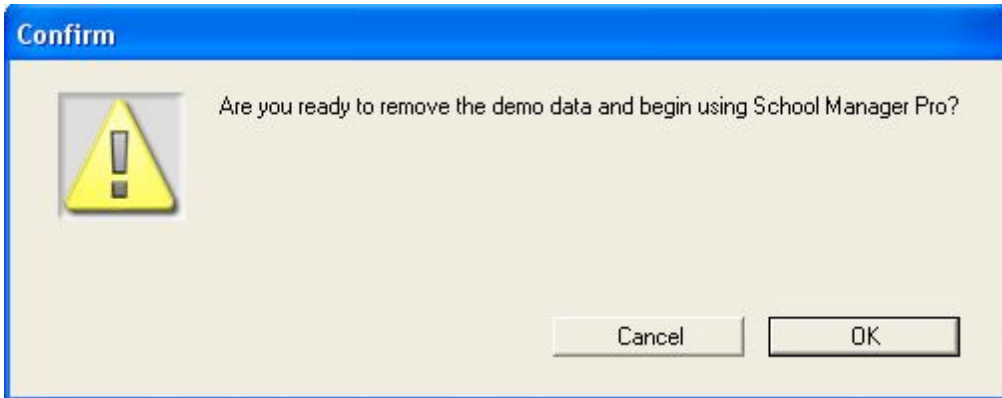
First, close all windows except the yellow status window.



Exit Demo Mode.



Confirm exit.



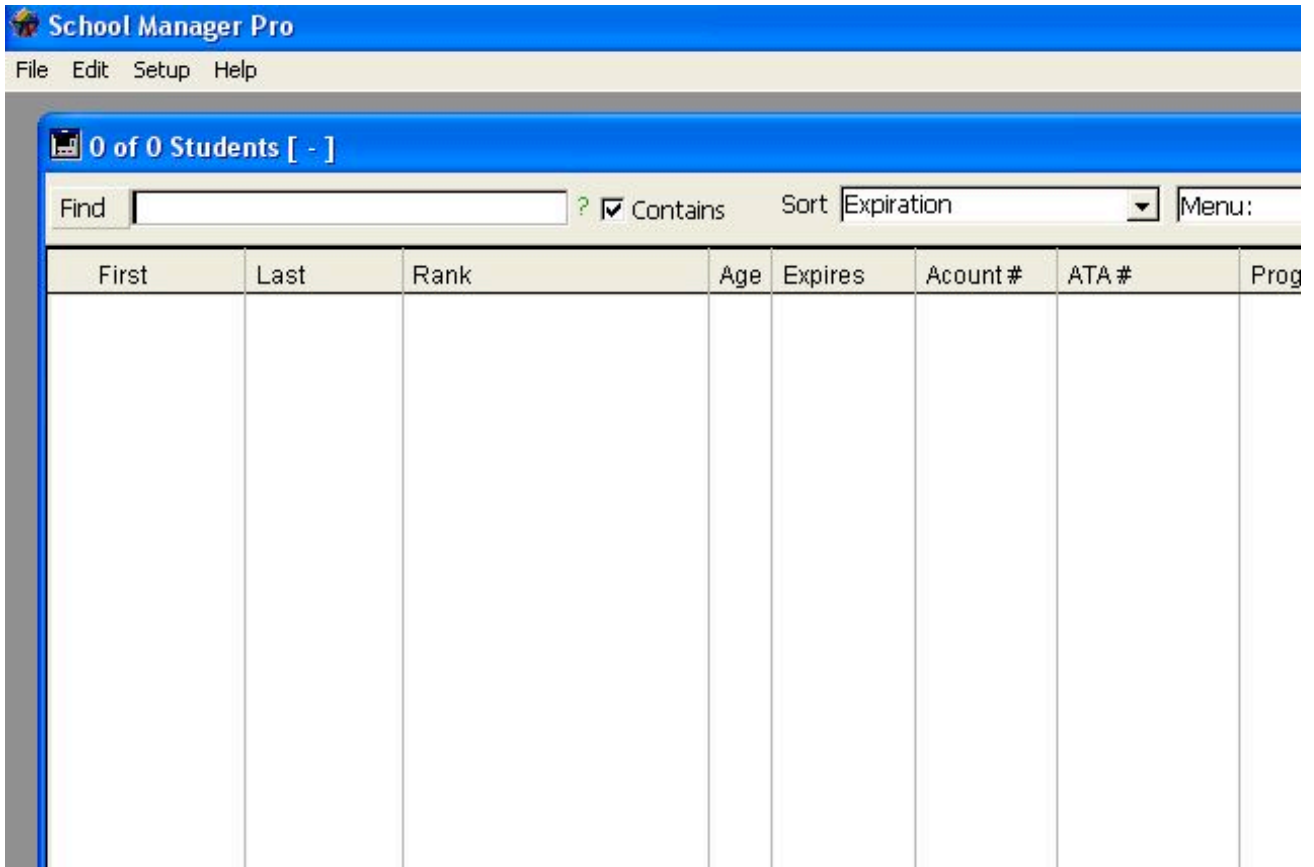
School Manager Pro may now ask you to login again as the school owner.

User Name: **School Owner**

Password: **(Refer to letter that came with your program, e-mail us at sales@schoolmanagerpro.com or call 1-800-510-6546 or 816-510-2272)**



School Manager Pro is now open with no student information entered.



Before entering student data, we need to verify that the exit was successful. To do this, go to the “Setup” menu and select “Ranks”. This screen should be filled in with the ranks. If not, please call SMP before entering any information.

You have now exited demo mode and are ready to set up Preferences for your school. Make sure you set up these fields before entering any leads or students.





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## Setup, Preferences

Click on Setup.

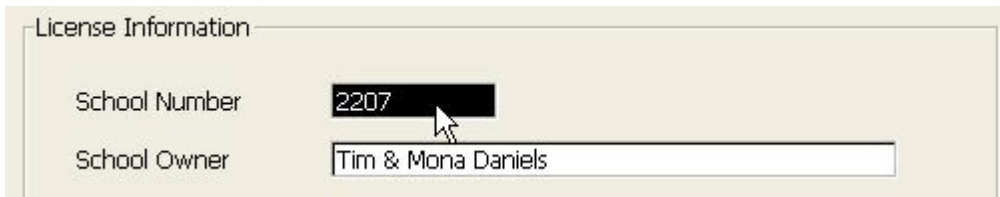


Select Preferences.

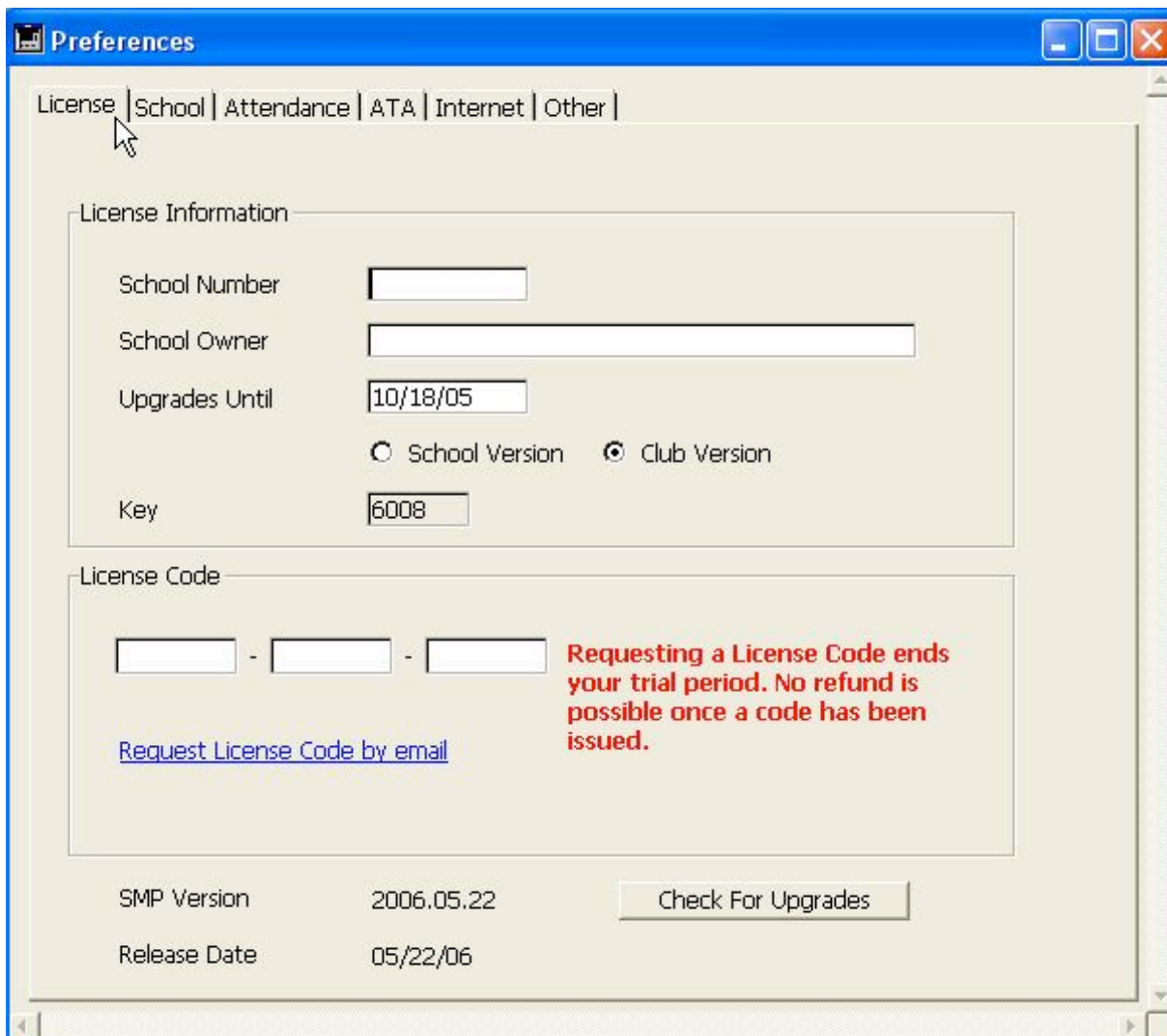


School Number – enter your ATA School Number. This number is required, and cannot be changed.

School Owner – This is the name of the person or entity that owns the school, and should agree with your ATA-registered information.



Next change the “Upgrades Until” date to 1 year from the day you purchased School Manager Pro. To obtain your license code, click “request license code by e-mail” or call us at 1-800-510-6546. Please note, once a license code has been issued, we cannot give refunds.



Next set up the School tab. [These elements will appear on certain forms that are printed, such as invoices, etc.]

The screenshot shows a 'Preferences' window with a blue title bar. Below the title bar is a navigation bar with tabs: 'License', 'School', 'Attendance', 'ATA', 'Internet', and 'Other'. The 'School' tab is selected. The form contains the following fields:

|                |   |    |       |
|----------------|---|----|-------|
| School Name    | ATA Black Belt Academy<br>& Karate for Kids |    |       |
| Address        | 9000 E. 350 Highway                         |    |       |
| City/State/Zip | Raytown                                     | MO | 64133 |
| Phone          | 816-356-9905                                |    |       |
| Region         | 115   |    |       |
| Sales Tax Rate | 6.975%                                      |    |       |

School Name – Your “d/b/a” or Trade/Marketing name.

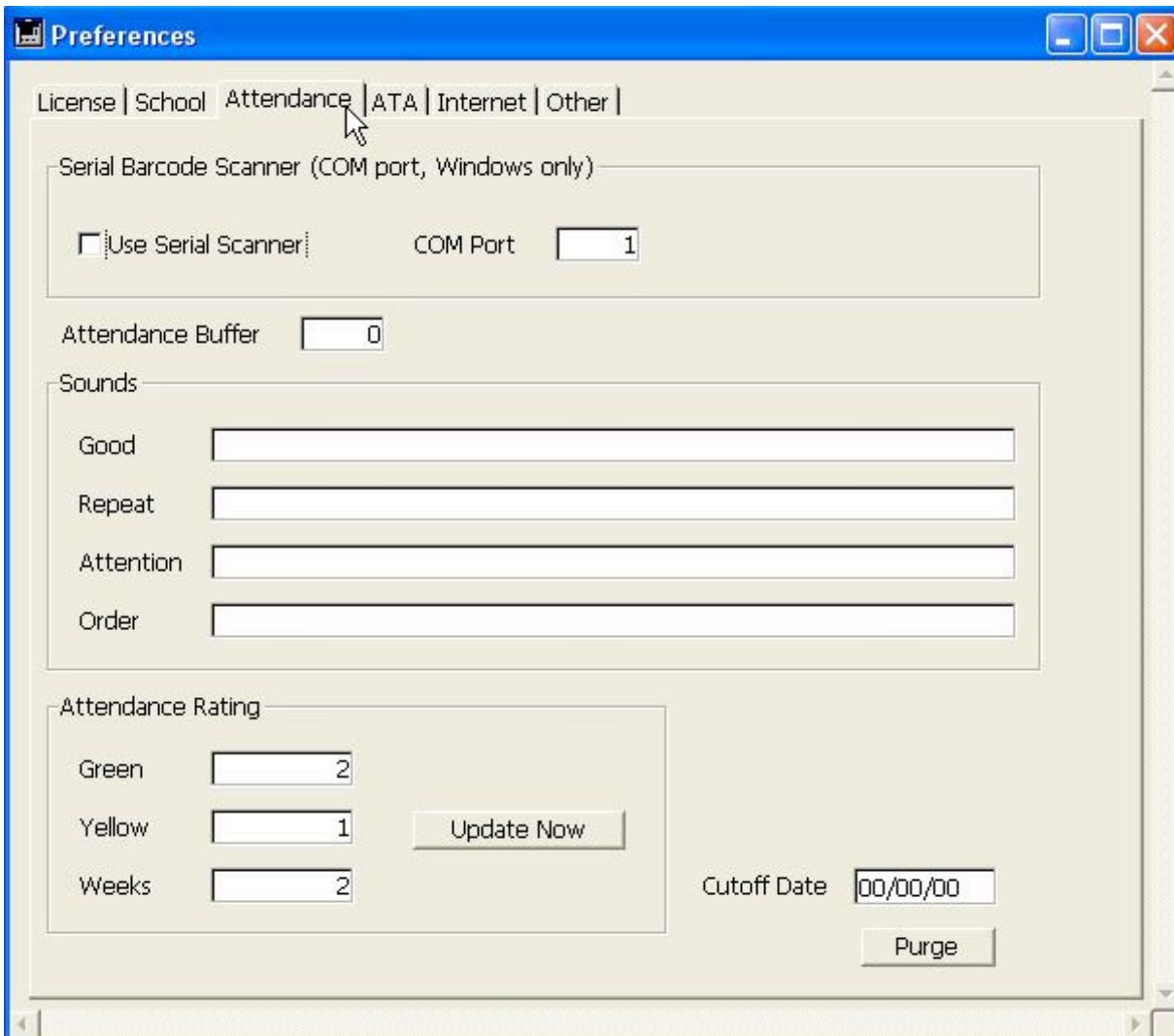
Address – Enter the physical address of your school.

Region – Enter the ATA region for your school.

Sales Tax Rate – Enter the sales tax rate that will be added to your sales. If, for example, your sales tax rate is 6.25%, enter “6.25” into this field.

Logo – You can put your school or business logo, in the form of an image file by following these steps: Click “Load” then browse to the image file that you wish to use (“logo.jpg”, for example). Now Click “Open”. The picture will be loaded, and will appear in the box. This can be changed at any time to a different image file by repeating steps above. Note: You can also copy and paste a picture into this field.

Now set up the Attendance tab.



If you have a Serial Scanner on a Windows machine, check the “use serial scanner” box and enter the COM Port number. If you are not using this combination, just leave this blank.

Sounds – You can enter this information so that SMP can play sounds that you specify. Sounds used by SMP must first be stored somewhere on your computer in the form of a [.wav]. You can record the sounds yourself (if your PC is set up with sound-recording capabilities), copy them from another source, etc.

To locate the sound you wish SMP to use for each of the below scenarios, copy and paste the path, or type the path to the sound file

Good –This is the sound that SMP will play through your computer’s speaker(s) when a “good” code is scanned.

A “good” code is a barcode that has been associated with a particular student, and is therefore recognized by SMP for recording their attendance. (REF: See Students Setup section).

SMP will play the sound you load here when the code is scanned, no matter what else is going on in

the program at the time.

Example: “Thanks! Have a great workout!”

Repeat – This is the sound that SMP will play if a code is scanned that has already been scanned within the number of minutes you specified in “Attendance”. Again, you can load any [.wav] file that is on your computer.

Example: “Thanks again!”

Attention – This is the sound that SMP will play if a student’s card is scanned whose membership is expired. SMP checks each scan to associate it with the student, and then checks that student’s contract expiration date (REF: Students) and plays this sound if their contract is expired.

Example: “Attention! Please see the Front Desk.”

Order - This is the sound that SMP will play if a student’s card is scanned who has an order that has arrived [REF: Orders]

The Attendance Buffer is the time between scanning the same card twice. The number in the box is the number of minutes between scans of the same barcode (student’s ID card) that SMP should ignore the subsequent scans as “repeat” scans. If a student scans his/her card when arriving for class, then forgets that they did so and scans it again when leaving, SMP can ignore the second scan as long as it is within the number of minutes you specify here. The default of 120 means that a student who scans their card within 2 hours of a previous scan will only have one class recorded in his/her attendance. If that student, however, scans more than 2 hours later, a second class attendance will be recorded for that day. If left blank, SMP will record each scan of the card as a class attendance.

Attendance Rating. This field is the setting that determines what color of dot will show next to the students’ name in a list.

Green – The number in this field is the number of classes per week a student is expected to attend to be marked as “Green”, representing regular (“good”) attendance.

Example: Enter “2” in this box if a student who attends AT LEAST 2 classes per week is considered to have “good” attendance (no problems).

Yellow - The number in this field is the number of classes per week a student is expected to attend to be marked as “Yellow”, representing low but somewhat regular (“ok”) attendance.

Example: Enter “1” in this box if a student who attends AT LEAST 1 class per week (but fewer than the “Green” number) is considered to have “ok” attendance (possible attendance problems).

Any student attending an average LESS than the number entered in the “Yellow” field will be marked as Red in the Student List view, indicating at a glance that the student is attending few or no classes.

NOTE: You can enter any number in these two fields, including decimals, such as “1.5”, “2.9”, etc.

Weeks – Enter the number of weeks that you want SMP to count back from today in calculating average number of classes attended for a student (example: “8” in this box will evaluate each student’s attendance record for the previous 8 weeks, and display the appropriate colored light indicating that student’s attendance for that period).

In the following example, School Manager Pro averages the number of classes over a 2-week period. Students with an average of 2 or more classes per week will have a green dot, students with an average of 1-2 classes per week get a yellow dot, and if they average less than 1 class per week they get a red dot.

Attendance Rating

Green

Yellow

Weeks

The color dots are seen on the student list.

|  |                          |                                |
|--|--------------------------|--------------------------------|
| <span style="color: red;">●</span> <a href="#">Lindsey</a> | <a href="#">Fotovich</a> | <input type="text"/>           |
| <span style="color: red;">●</span> <a href="#">Luke</a>    | <a href="#">Doan</a>     | <input type="text"/>           |
| <span style="color: green;">●</span> Tim                   | Johnson                  | <input type="text"/>           |
| <span style="color: green;">●</span> Kendall               | McNary                   | <input type="text" value="2"/> |
| <span style="color: yellow;">●</span> Skyler               | Bailey                   | <input type="text"/>           |
| <span style="color: green;">●</span> Aliyah                | Cahill                   | <input type="text" value="1"/> |
| <span style="color: green;">●</span> Kenneth               | Green                    | <input type="text" value="1"/> |
| <span style="color: green;">●</span> Garan                 | Taylor                   | <input type="text" value="2"/> |
| <span style="color: green;">●</span> Dominique             | Rasmussen                | <input type="text" value="2"/> |
| <span style="color: green;">●</span> Levi                  | Denton                   | <input type="text" value="2"/> |
| <span style="color: green;">●</span> Cameron               | Johnson                  | <input type="text" value="1"/> |
| <span style="color: green;">●</span> Claudia               | Bergmann                 | <input type="text" value="1"/> |
| <span style="color: red;">●</span> Tyeree                  | Byers                    | <input type="text"/>           |
| <span style="color: green;">●</span> Trenton               | DeJesus                  | <input type="text" value="1"/> |
| <span style="color: green;">●</span> Trent                 | DeJesus                  | <input type="text" value="1"/> |
| <span style="color: yellow;">●</span> Stacy                | Becker                   | <input type="text" value="2"/> |
| <span style="color: yellow;">●</span> Trevor               | Ross                     | <input type="text" value="3"/> |

The next tab is the ATA tab. This tab is where you change the amount you charge for ATA memberships and the amount you send to ATA headquarters. This is important for School Manager Pro to know so that it can figure your testing financial correctly. In the “charge” column, enter the amount you charge your students for ATA Memberships. In the “cost” column, enter the amount Headquarters charges you for each of these memberships (This data should already be defaulted in, just double check it to make sure it is accurate. Customers in Canada or other countries should enter their amount.)

The ATA Advance Renew will check ATA Membership expiration dates for the specified number of days from testings. In the following example, SMP will check each student and anyone whose ATA membership will expire in less than 60 days, will be charged a renewal fee with this testing.

ATA Advance Renew

The “Testing” field on this tab sets the amount you want to charge for 3rd (or more) family members testing and mid-termining. You can also set the your cost for the these. If you are licensed with

headquarters to use the K4K program, you should enter the per student charge headquarters charges you with each testing.

| Testing      | Charge                            | Cost                              |
|--------------|-----------------------------------|-----------------------------------|
| Testing 3rd+ | <input type="text" value="5.00"/> |                                   |
| Midterm 3rd+ | <input type="text" value="5.00"/> |                                   |
| K4K          |                                   | <input type="text" value="1.00"/> |

The next tab is the Internet tab. The fields labeled “mail server”, “user name” and “password” are all for information regarding your email service provider: their address, your user name with them and your password with them. You can get this information by viewing the account configurations in your email client (i.e., Outlook, etc.), or by contacting your ISP/Email provider. The “From Address” field is what you want to show as the address the emails are sent from.

License | School | Attendance | ATA | Internet | Other

Email

Mail Server:

User Name:

From Address:

Password:

Top 10

Check standings via the Internet

Publish School Standings to Web Site

Web Site Home Page:   
http://www.k4k.biz

Last World Update:

Last World Update:

Email To:

IMPORTANT!! IF YOU DO NOT HAVE INTERNET OR HAVE DIAL UP INTERNET, MAKE SURE THAT THE "TOP 10" BOXES ARE UNCHECKED.

If you do have an Internet connection check mark next to "Check standings via the Internet". If you have a web site, also make sure you check the box next to "Publish School Standings to a Web Site". You will also need to enter your web site home page.

Top 10

Check standings via the Internet

Publish School Standings to Web Site

Now School Manager Pro will automatically check the ATA website for each of your leadership students for both state and top 10 standings.

| Name & Rank                                     | Black Belt Top Ten Current Standing |          |           | State Champion Current Standing |          |          |
|---|-------------------------------------|----------|-----------|---------------------------------|----------|----------|
|   | Forms                               | Sparring | Weapons   | Forms                           | Sparring | Weapons  |
| Dave Doan 🌐 🇺🇸<br>3rd Degree Black Belt         | 1st<br>🏆                            |          |           | 1st<br>🏆                        | 2nd<br>🏆 | 2nd<br>🏆 |
| Tim Daniels 🌐 🇺🇸<br>3rd Degree Black Belt       | 7th<br>🏆                            | 8th<br>🏆 | 1st<br>🏆  | 2nd<br>🏆                        | 1st<br>🏆 | 1st<br>🏆 |
| Mona Daniels 🌐 🇺🇸<br>2nd Degree Black Belt      |                                     |          |           | 1st<br>🏆                        | 1st<br>🏆 | 1st<br>🏆 |
| Amy Daniels 🌐 🇺🇸<br>2nd Degree Black Belt       |                                     |          |           | 4th<br>🏆                        | 5th<br>🏆 | 3rd<br>🏆 |
| Kyle Nikolaisen 🌐 🇺🇸<br>2nd Degree Black Belt-R |                                     |          |           | 7th<br>🏆                        |          | 5th<br>🏆 |
| Christina Doan 🌐 🇺🇸<br>2nd Degree Black Belt-R  |                                     |          |           | 1st<br>🏆                        | 3rd<br>🏆 | 1st<br>🏆 |
| Stephen Daniels 🌐 🇺🇸                            | 3rd<br>🏆                            |          | 10th<br>🏆 | 1st<br>🏆                        | 3rd<br>🏆 | 2nd<br>🏆 |

The last field on the Internet tab has the last time the ATA updated its top ten pages. The program will update this field automatically. If you add e-mail addresses to the "Email To" field, SMP will also send an e-mail each time ATA updates top ten.

|                   |  |
|-------------------|--|
| Last World Update | <input type="text" value="05/17/06"/>                                      |
| Last World Update | <input type="text" value="05/17/06"/>                                      |
| Email To          | <input type="text" value="tim@timdaniels.com, doan@schoolmanagerpro.com"/> |

Other Tab.

License | School | Attendance | ATA | Internet | **Other**

Next Testing  I am a Distributor

Small font when printing My Distributor Is

Delay Search Distributor Password

Search Student Notes

Use Different Tiger Belts

Custom Field Names (Student Screen)

Friend Of  Custom 3

Custom 2  Custom 4

*Leave a field name blank to hide that field on the student screen.*

Automatic Backup

Startup  Quit  Internet Backup

Daily at

Last Backup:

Next Testing – This is the date of your next scheduled testing. The scheduling screen to estimate class size for future schedules uses this.

Small font when printing – Checking this box will reduce the font size on the printed membership form. You should check this box if you see that the text on your membership forms is being cut off.

Delay Search – Later in this manual, the “Find” box for the main Student list will be described. The “Find” box provides a powerful search function that continuously and simultaneously searches multiple fields of data for matches as each character is typed. This search function is extremely useful, but can cause performance problems on slower computers, and/or if you have a very large

number of students in your database. This might create an unacceptable delay while typing text in the “Find” box. If you find this to be the case, you can come back to Preferences and check the Delay Search box. This will cause the search to update only when you have finished typing the search name and leave the “Find” box (by hitting the tab key).

Search Student Notes – If you check this box, SMP will not only search names, addresses and phone numbers, but will also search the student and family notes. Example: If you have this box checked and type the word “friend” in the “find” box; you will get a list of every student who has the word “friend” in his or her notes. You may only want to turn this on when you want to do a search of student notes, as it will slow down the “find” feature.

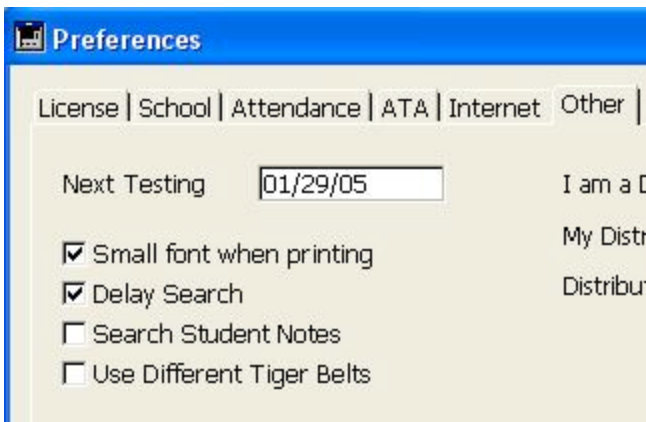
Use Different Tiger Belts – Check this box if you use different belts for tigers than you use for everyone else.

Distributor fields – These fields are for multiple schools and owners who have one central location to get their merchandise. (Not WMA).

Custom Field Names (Student Screen) – There are four fields on the student information screen that you can rename and use for any data that you want to track. For instance, you may want to record what academic school your students attend. The custom fields remain hidden until you name them. You could enter “School” for Custom 1 and then you will have a field called “School” on your student screen that you can use. If you leave a field name blank, it will not appear on the student screen. (Note: removing the name for a custom field does not remove any data already stored. The field will simply not appear. If you enter a name for that field again, the field will re-appear and the data will still be there for any students that you entered information.)

Automatic Backup -- SMP creates a backup of your entire data file every day at midnight (if the program is running at that time). You can also check the Startup and Quit boxes to have SMP create a backup each time you open or quit the program. Turning on Internet Backup will provide an additional layer of data protection by sending your backup data file automatically to the SMP developer’s server via the Internet. In the event of total loss of your computer system (i.e., catastrophic weather event, complete hard drive failure, etc.), your last backup data file can be recovered for you by the SMP developer.

Last Backup: -- This field displays the last date that your data was successfully backed up.



Automatic Backup. This is one of the most important features in School Manager Pro. Automatic Backup -- SMP creates a backup of your entire data file every day at the time entered into the “Daily at” box (if the program is running at that time). You can also check the Startup and Quit boxes to

have SMP create a backup each time you open or quit the program. Turning on Internet Backup will provide an additional layer of data protection by sending your backup data file automatically to the SMP developer's server via the Internet. In the event of total loss of your computer system (i.e., catastrophic weather event, complete hard drive failure, etc.), your last backup data file can be recovered for you by the SMP developer. This has saved several schools from losing more than a day's worth of data. Make sure this box is checked.



Cutoff date is for the purge button. Some people have been using SMP for 15 years and decide to purge old attendance data because they have over 100,000 attendance records. Just put a date and click purge and all attendance records before that date will be deleted.

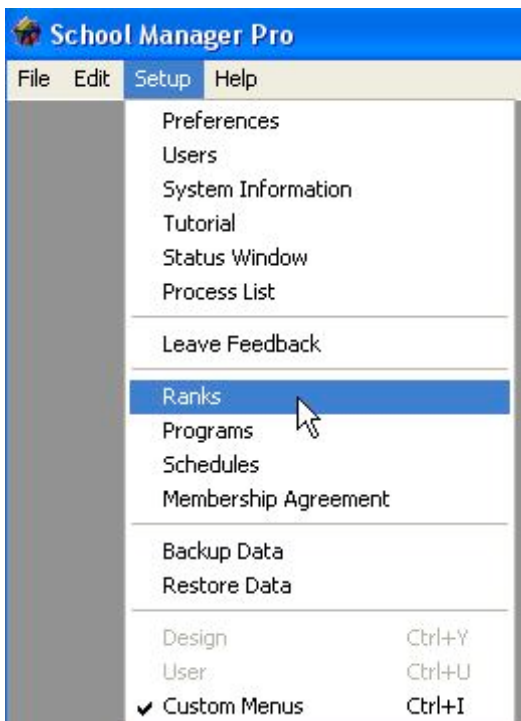
Now that your Preferences are setup, move on to Setup, Ranks.

















---

## Setup, Ranks

Click on the Setup menu. Select Ranks.



The Ranks preferences window will appear.

| Ranks |            |       |        |   |         |       |               |             |               |
|-------|------------|-------|--------|---|---------|-------|---------------|-------------|---------------|
| ID    | Name       | Short | Color  | Picture   | Promote | Block | Tiger Promote | Tiger Block | Minium Classe |
| 1     | 9 White    | 9D    | White  |  | 2       | 1     | 1             | 1           | 12            |
| 2     | 8 Orange R | 8R    | Orange |  | 3       | 1     | 1             | 1           | 14            |
| 3     | 8 Orange D | 8D    | Orange |  | 2       | 1     | 1             | 1           | 14            |
| 4     | 7 Yellow R | 7R    | Yellow |  | 3       | 1     | 1             | 1           | 14            |
| 5     | 7 Yellow D | 7D    | Yellow |  | 2       | 1     | 1             | 1           | 14            |
| 6     | 6 Camo R   | 6R    | Camo   |  | 3       | 1     | 1             | 2           | 14            |
| 7     | 6 Camo D   | 6D    | Camo   |  | 2       | 1     | 1             | 2           | 14            |
| 8     | 5 Green R  | 5R    | Green  |  | 3       | 1     | 1             | 2           | 14            |
| 9     | 5 Green D  | 5D    | Green  |  | 2       | 1     | 1             | 2           | 14            |
| 10    | 4 Purple R | 4R    | Purple |  | 2       | 1     | 1             | 2           | 14            |
| 11    | 4 Purple D | 4D    | Purple |  | 1       | 1     | 1             | 2           | 14            |
| 12    | 3 Blue R   | 3R    | Blue   |  | 1       | 1     | 1             | 2           | 11            |
| 13    | 3 Blue D   | 3D    | Blue   |  | 1       | 1     | 1             | 2           | 14            |
| 14    | 2 Brown R  | 2R    | Brown  |  | 1       | 1     | 1             | 2           | 14            |

All fields are set up with default data. Unless you are using non-ATA belt systems, “promote” is the first field you may want to change. This field lets you set up what would be the default progression for a student testing from each rank. In this example, at the White belt level the Promote is 2. This means the default rank that the computer will promote the student at testing is 2 levels, an 8 Orange D. (This can be changed manually if the student doesn't promote to that level. See Testings section of this manual.) Notice that at 8 Orange R, the Promote is set to 3, promoting the student to 7 Yellow D. Also, look at the Purple and Blue belts. These are set to Promote 1 level at a time. You can change any of these Promote levels to fit the Promotion/Testing in your school.

The Tigers have a separate Promote field. This is to allow Tigers to move at a different rate than the rest of your students. Customize these fields to suit your Tiger levels.

Block is the next field. This column allows you to set the Block in which this rank will train. This information is used to help sort your testing orders. For instance, if your Block System puts White, Orange, and Yellow in the same block and camo, green and purple in another; you would enter a “1” in the “Block” column next to all White, Orange, and Yellow ranks, a 2 next to all camo, green and purple ranks, etc. As with the “promote” field, there is a separate field for blocks for Tigers.

The next field is for how many classes each rank is expect to attend in order to be eligible to test.

The other fields are for testing fees. Here you can set your testing fees and the amount you send to ATA headquarters. This will set up your testing financials. (Note: 3rd family member discounts are set up under preferences. Look under "Setup, Preferences" in this manual.) Please note: As in the picture below, unless you are logged on as “school owner” the Testing and Midterm cost will remain hidden. To view this information, log on as the school owner.

| Testing Fee | Testing Cost | Midterm Fee | Midterm Cost |
|-------------|--------------|-------------|--------------|
| 45.00       |              | 0.00        |              |
| 45.00       |              | 0.00        |              |
| 45.00       |              | 0.00        |              |
| 45.00       |              | 0.00        |              |
| 45.00       |              | 0.00        |              |
| 45.00       |              | 0.00        |              |
| 45.00       |              | 0.00        |              |

Export – This will export (or save) a copy of your current rank structure. You may want to do this, for example, before making wholesale changes to your Rank structure, in case you decide to revert back to the previous structure. Click “Export”, type a name for the file, and save it in the desired location (your computer’s hard drive, a floppy disk, etc.). You can also use this feature to share your Rank structure with another school owner, or for use in another school that you own where you are also using SMP.

Import – Use this to import a Rank structure that has been exported previously (either from your own SMP, or another school, etc.). When you click “Import”, SMP will warn you that you are importing new ranks, as this will replace your entire existing Rank structure. Click “Import Ranks”. SMP will then verify that you are performing this action on purpose, and not by mistake, by asking you to type the word “replace” in the window. Once you type the word replace, and click “OK”, SMP will allow you to browse for the file to be used for your Rank structure. Browse to the desired file, and then click “Open”. Your Rank structure has now been replaced.

Ranks are now setup for your school.

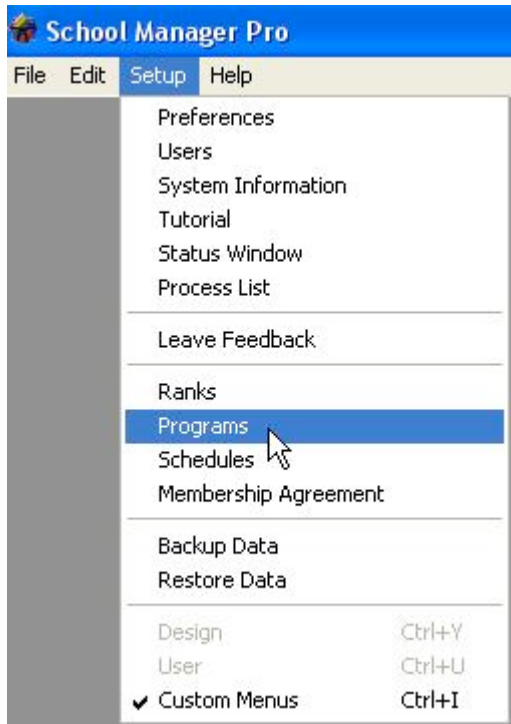




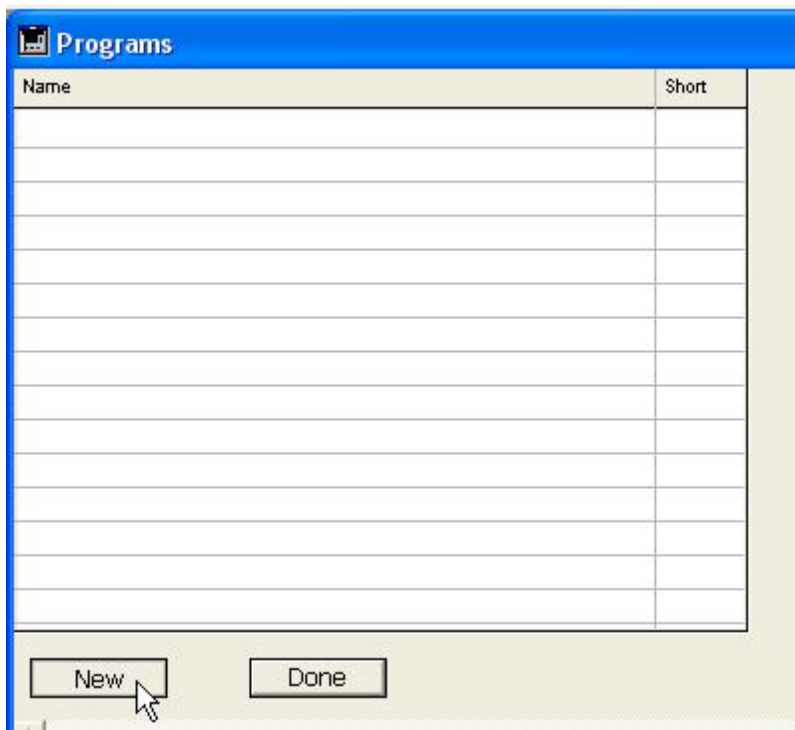
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## Setup, Programs

Click on Setup and select Programs.

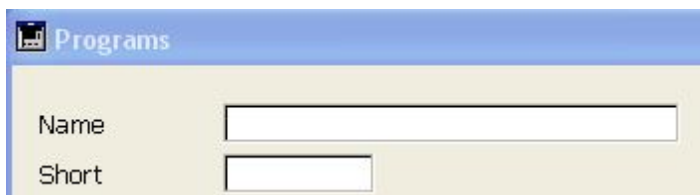


This is a list of your programs you have set up. Students can be in an unlimited number of programs, therefore, we recommend that you create a program for each division you have based on material in your school. For example, let's say that you teach ATA Xtreme in your school and anyone can join this class, you should create a program for them. In addition, everyone should be in a program like Basic, BBC, Tiger, Tiger BBC or Leadership. To create a program, click new.

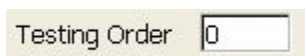


Type in the full name of the program and a short name. The short name will be used for searches and to display on the student list what program(s) the student is in.

(Example: Black Belt Club: BBC)



Testing Order is the order in which the judging sheets for testing will print. If you want Leadership to be listed first then you would give it a testing order of 1. Number each program different to get the best results.



If you want members in a program to have a discount on the items they buy, enter the percentage amount in the “discount” field. Each time an order is created for a student in this program, SMP will automatically give them this discount unless it is an item that is not discounted (example: testings do not get a discount). We will cover preventing certain items from being discounted in the “inventory” section.

Discount :  %

If you give out a new belt at testing for those students that move from recommended rank to decided rank then you need to choose at what rank you start giving those belts.

New Belt for Decided  Clear

Belt Priority

Tiger

Leadership

- 9 White
- 8 Orange R
- 8 Orange D
- 7 Yellow R
- 7 Yellow D
- 6 Camo R
- 6 Camo D
- 5 Green R

If this is a Tiger program or a Leadership program then you need to designate that here.

Tiger

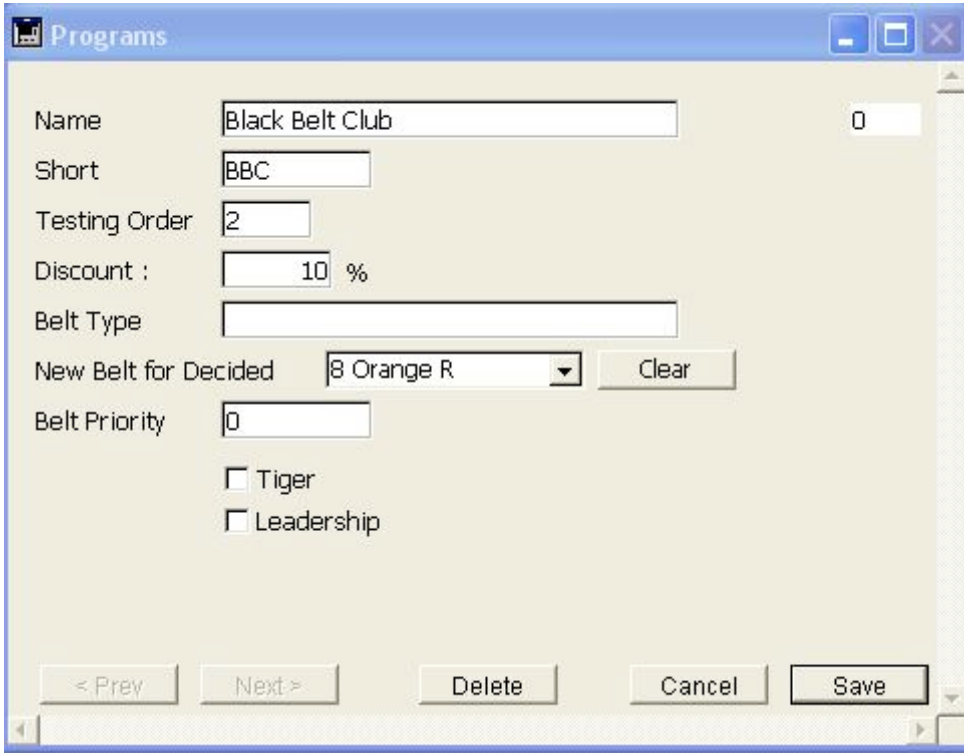
Leadership

If you use a different type belt (Black or Gold stripe) for this program then type in what type of belt you use.

Belt Type

Belt priority has to do with setting up your programs so that SMP will know which belt to order at testing. In our case, for example, we use black stripe belts for BBC and gold stripe for MC and Leadership. When we upgrade someone to MC, we add them to that program, so SMP knows they get the gold belt. If there is ever a conflict (like a student is in two programs that both have a different belt style like BBC and MC), SMP uses the belt style with the highest priority. In our case, that would be MC, so it has a 3 while BBC has a 2 in belt priority. This way you don't have to change the belt type for each student, just set it up in programs and it "just works".

Once the program is filled out correctly press save.



Programs

Name: Black Belt Club 0

Short: BBC

Testing Order: 2

Discount : 10 %

Belt Type:

New Belt for Decided: 8 Orange R Clear

Belt Priority: 0

Tiger

Leadership

< Prev Next > Delete Cancel Save

This will bring you back to the list of programs you have saved. Repeat this process until you have each program set up for your school.

You can delete a program with no problem. SMP will ask if you want to move the students to a different program as part of the deletion process. One benefit of the multiple Programs feature is that you can set up things like "Demo Team", "XMA", "Yoga" or whatever and add students to additional categories to track things besides just their primary TKD program. This different approach might take some getting used to, but proves to be very powerful and flexible once you have it down.

This finishes setting up the Setup, Programs section.



### Schedules

Set up class schedules including days, times, location, ranks attending, and programs attending. This area will also display how many students would attend the class based upon your current student roster and the settings you specify here, both now and after a scheduled testing. This is an excellent tool to determine the projected size of a class.

To set up a new Schedule, click “New”.

Day, Start Time, End Time, and Location – specify the times and days of the week the class will occur, and the location for the class (i.e., if your school has multiple workout floors/rooms).

Start Date and End Date – The day, month, and year that the class will begin and end (i.e., schedule this class to run through one testing cycle by beginning it on the day after one testing and ending the day of the next scheduled testing).

Active – Check this box to make this class active now.

Ranks and Programs – Specify which ranks will be allowed to attend this class, and which program members.

Click “Choose”, then Ctrl-click to select multiple ranks (Command-Click on Macintosh), Shift-click to select ranges of ranks, or Ctrl-A (Command-A) to select all ranks.

Count – Click “Count” to cause SMP to count how many students in your current database meet the criteria for attending this class schedule.

To edit an existing Schedule, double-click the desired Schedule in the list. Edit the desired information.

Previous/Next – Use these buttons to navigate through existing Schedules in your list without having to leave the editing window.

Copy – Use this button to create a duplicate copy of this Schedule. If you want to add a new Schedule that is similar to an existing one, copying the existing Schedule and then editing it for the new item will save steps.

Delete – Use this button to delete a Schedule.

Save – When you have finished editing a Schedule, click “Save” to save the information.

Count – Click the Count button in the Schedules list window to cause SMP to count how many students in your current database meet the criteria for attending this class schedule. The number is displayed in the “Students” column.

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## Setup, Membership Agreements

The only reason you would need to do anything here is if you want to change the default membership agreement. When you select this option a window will open. On the left hand will be the current text from the box that is highlighted on the right side of the window. You may type any changes you choose to make here. To choose a different paragraph, simply click it on the right side of the window. When you have made your desired changes, simply exit this window. NOTE: clicking “reset” will put the default wording back. It is also important to remember that you choose “Use Custom Form” when you start printing memberships for your students. (This will be covered in the section on students.)

**Packages:** The last thing you should set up at the beginning is the Packages you wish to offer. This can be changed and updated at any time. Good examples of packages to set up include: sparring gear, lettered uniforms, clinics that will include weapons, etc. It is also a good idea to set up any kind of new student program in which they are given a uniform. This will make sure that your inventory stays accurate.

To begin, go to the “File” menu in the upper left corner of the window. Select “Packages”, this will open a window with a list of your existing packages. (These packages can be deleted by double clicking on the package and clicking the “delete package” button at the bottom of the resulting window.) Click the “add” button at the bottom of this window. Type the name of the package in the first box on the new window. Make sure it is distinguishable from any other package. Let’s say we want to create a package with everything that someone just joining black belt club will need. We might name this package “BBC gear.” Once we have named the package, we need to let SMP know what components will go into the package. Double click on the first blank line in the “Package component” field; this will open a new window. Type a simple, easily recognizable name for the first item, like Headgear. The default in the “quantity” box is one. This can be changed to whatever you need. (Example: If master club students need two ssahng jeol bongos, change the number to “2” This will automatically sell them two.) Then click the “find” button. Doing this will open a window with a list of all inventory. You will want to narrow this down to what you are looking for. So in the “find” field, type “headgear.” If your BBC students should have a certain color of gear, you can also type that color. So in this example we would type “headgear black”. This will result in a list of all available black headgear. In this example the only things that comes up is each size of exactly what I am looking for, so we click “add all” at the bottom of the screen. But you may only want certain items from the resulting list. You can do this by double clicking on each item that you want to add as an option. When you have everything listed that is an option, simply close the window. Repeat this process until you have every component of the package on the list. By setting this up carefully, you can insure that no one buys the wrong kind or color of anything. This also makes it very easy for someone who is working the front desk but doesn’t know the details of what each program needs to make the sale and get it right.

Once you have chosen each component for the package, decide what you want to do about a price. If you don’t want a discount on this package, you are finished. If you do, you can either fill in the box next to selling price for the price you want, or you can select one of the other options from the drop down box and fill in the box next to your choice. The other choices are: Discount amount, which allows you to deduct a certain dollar amount or discount percentage.

You now have everything ready to use School Manager Pro!



## STATUS WINDOW

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The status window is the window that will open every time you open the program. This window will be just to the right of your student window. It has three white boxes: Reminders, Attendance and Windows.

**Reminders** – This is a list of things that need to be done for you school. Double-clicking on any of these items will open the window that you need to use to take care of that item. This box will show you how many students have red attendance, lead reminders that are overdue, items to order, sales with a balance due and expired students.

**Attendance** – This will simply list the students' names with recent recorded attendance. The clear button will clear the box; however, it will not delete the recorded attendance from the student record.

**Windows** – This will show you all windows that you have open in School Manager Pro. You can easily navigate between these windows using this box by double-clicking on the name of the window you want to go to.

At the top of the status window are two icons, one looks like a little man and the other is a box with boxes inside.

The box with the man allows you to send us suggestions or to report bugs. When you click on this icon a window will open. Fill in the information and hit send. We will take suggestions under consideration and will work on fixing any bugs.

The second icon is a calendar. Double-clicking on this will open a calendar that shows all of your lead and student reminders. We will cover how to set those up in the student and lead section of this manual.



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# Using the Leads Section

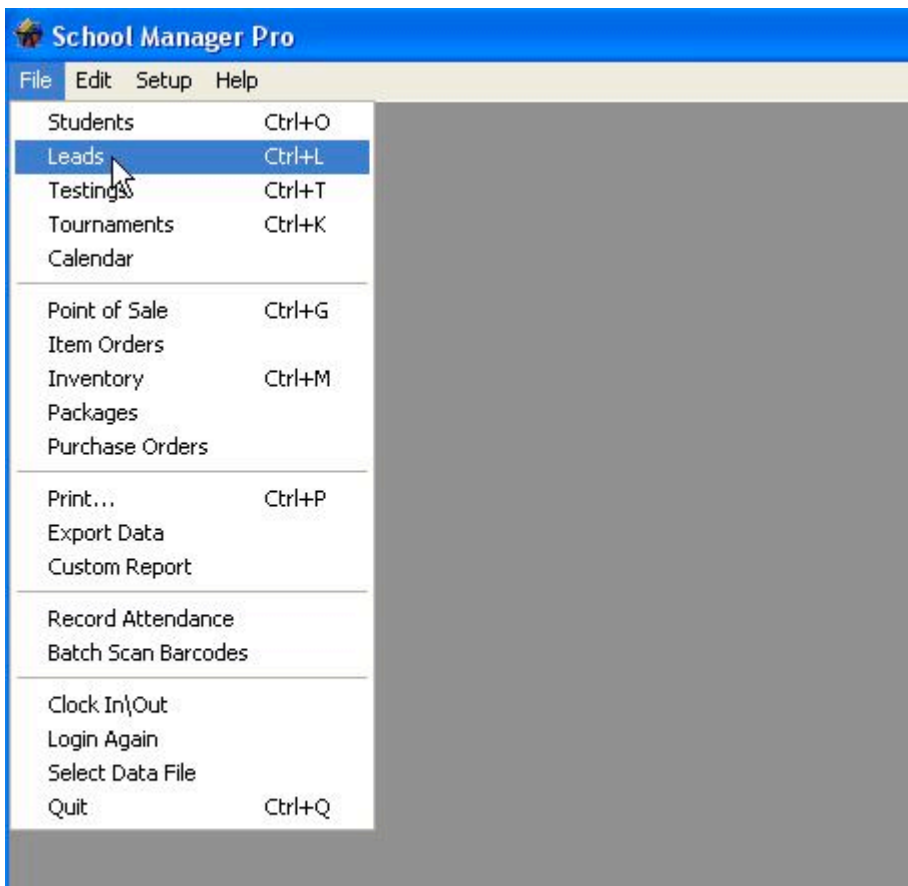
## Creating a Lead

We recommend that you always begin here to enter a student or a lead. After all, a student is always a lead before they are a student. There are several reasons for doing this that will be covered later in this manual.

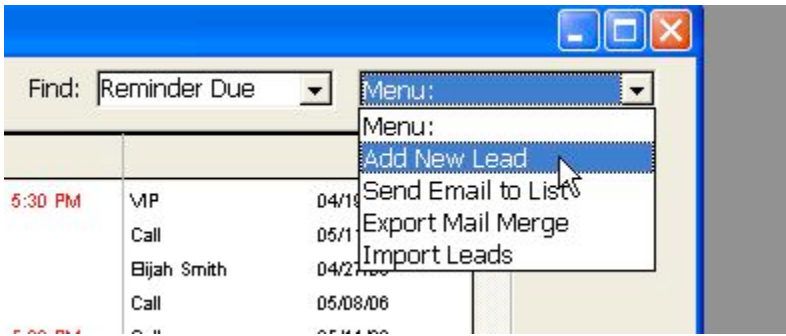
It is also a good idea to always put every lead into the program! Our instructors use “call sheets” and are required to immediately put all information in – even if it is just a name and phone number. Putting the lead into the computer will insure that you never lose this extremely valuable information.

The more detailed information you enter for a lead, the easier it will be to convert that individual to a student when they enroll. We recommend that you make it a habit for yourself and policy for your associates always to enter information on anyone who contacts your school. This data can be utilized by SMP to convert that lead to a student, and also to help you analyze and evaluate your lead-generating sources (i.e., marketing efforts such as fliers, mailers, yellow page ads, coupons, etc., as well as walk-ins, callers, friends/family of students, etc.).

To begin, click on File. Select Leads.



On the right side of the screen there is a drop down menu. Click on the arrow and select Add New Lead.



Fill in all available information.

**David Doan & Christina Fotovich**

Father: First [David] Last [Doan] Work Phone [816-510-2503]  Joined

Mother: First [Christina] Last [Fotovich]  Cold

Family Name [Doan]

Home Phone [816-356-9905] Email [Doan@schoolmanagerpro.com]

Address: [11835 W 88th Terr] Source [Walk in]

[Kansas City] [MO] [64115]

Student Name(s) +

| First   | Last     | DOB        | Age | Girl                                | Joined                   |
|---------|----------|------------|-----|-------------------------------------|--------------------------|
| Luke    | Doan     | 05/16/1997 | 9   | <input type="checkbox"/>            | <input type="checkbox"/> |
| Lindsey | Fotovich | 01/06/2002 | 4   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
|         |          |            |     |                                     |                          |

Notes: 5/18/06 - TD - walked in at 6:30. First class will be on 5/19/06. Remind her tomorrow.

Reminders | Memberships

+ -

| Date       | Action    | Time    | Done                     | Note  |
|------------|-----------|---------|--------------------------|---|
| 05/19/2006 | 1st Class | 7:15 PM | <input type="checkbox"/> | Luke's First Class                                  |
| 05/19/2006 | 1st Class | 5:30 PM | <input type="checkbox"/> | Lindsey's first class                               |
| 05/19/2006 | Call      | 3:00 PM | <input type="checkbox"/> | Remind Christina to bring Luke and Lindsey to class |

General/Family information -- “Father”/”Mother” can be thought of as head of a household/family, and could be the same as the (prospective) Student Name, or different. Enter all information you have available in the appropriate fields.

Student Name: This is where you can list the names of (prospective) students associated with this family.

To add a student, click on the Student Name(s) list area, and then click the plus sign above the box. Fill in the (prospective) student’s first name, last name, date of birth, and age, and check the box next to “Girl” if the student is female. Add each member of the family that may be joining – even in the future. Source – Click in this box and select the source that generated this lead. You should set up a “source” for all advertising you utilize, buddy passes, friends/family, etc., then track which source brought in this prospect (“lead”). You will then be able to track the effectiveness of all marketing/advertising strategies.

To select an existing Source, click on it in the list and then click “OK”.

To add a Source to the list, click “Modify”, and then click “Insert” to add a source.

Click “Delete” to delete a source that was entered by error. You should not delete a source that is valid, as you will want to be able to use all sources (past and present) for your analysis of leads per source, even if that source is expired.

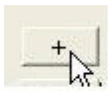
To select an existing Source, click on it in the list and then click “OK”. To add a Source to the list, click “Modify”, and then click “Insert” to add a source.

Click “Delete” to delete a source that was entered by error. You should not delete a source that is valid, as you will want to be able to use all sources (past and present) for your analysis of leads per source, even if that source is expired.

Use the Notes box to enter any additional information you wish to keep for this lead. When/If any student listed under this lead is “Joined” (see below), the notes in this field will appear in the Family Notes section of that student file. An example would be any physical limitations the parent tells you about, or any kind of special offer that you have made that you or someone else working the front desk might need to be reminded about.

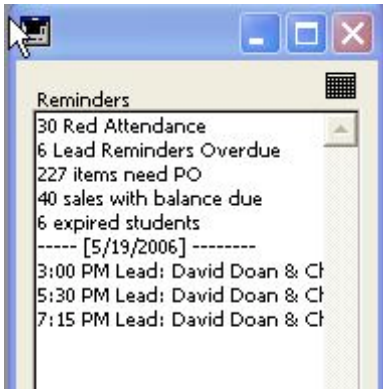
## Using Lead Reminders

Notice that you can add reminders to your leads using the Plus Button in the reminders section.



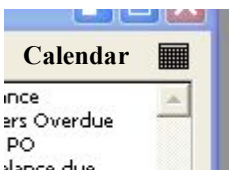
Use this area to note and schedule reminders for follow up actions that you want to take with this prospect. For example, Joey can't do Karate until he finishes soccer in September. You can enter September 1 for the date, call for the action, the time you were called (it is a good bet that the parent would be able to talk to you at this time, since it is when they called you) and in the notes field enter something like "soccer over, start Karate." This way, whoever handles this reminder will know what it was about. It is also a good idea to enter a reminder for an intro class to call the day before and day of. Be sure and click "done" when the action has taken place. You will be able to filter your view of prospects to show you all prospects you need to follow up on, all prospects for which you have an action scheduled for today only (appointments), as well as advanced search/filter features.

In addition, Reminders will show up in your status window to the right showing all of the current day's and the next day's appointments. If you double click any appointment, it will open that lead.



This box will appear on the upper right side of your screen anytime SMP is open, unless you close it.

Setting reminders also puts an appointment on your Calendar. This button opens a month's view for all appointments. This Calendar lets you choose to look at a month's view, a week's view, or a 2-week view. All reminders will show up on this Calendar. Notice on the 19th there are 3 appointments for this Lead.



Notice on the 19th there are 3 appointments for this Lead.

|    |  |         |
|----|--|---------|
|    |  |         |
| 18 | 19   | 20      |
|    | 3:00 PM Lead: David Do<br>5:30 PM Lead: David Do<br>7:15 PM Lead: David Do | Lead: L |
| 25 | 26   | 27      |

When an appointment is met or a call is finished check the “Done” box. This removes the time and date from your Reminders and the Calendar. To leave a reminder open just leave the box unchecked.

| Reminders   Memberships |           |         |                                     |                          |
|-------------------------|-----------|---------|-------------------------------------|--------------------------|
| + -                     |           |         |                                     |                          |
| Date                    | Action    | Time    | Done                                | Note                     |
| 05/19/2006              | 1st Class | 7:15 PM | <input checked="" type="checkbox"/> | Luke's First Class       |
| 05/19/2006              | 1st Class | 5:30 PM | <input checked="" type="checkbox"/> | Lindsey's first class    |
| 05/19/2006              | Call      | 3:00 PM | <input checked="" type="checkbox"/> | Remind Christina to brin |
|                         |           |         |                                     |                          |

Your lead saves automatically and you can now close out of this lead by pressing the X in the top right corner of the lead.

### Searching Leads

Find – The “Find” box is a powerful search tool that searches multiple data fields simultaneously as text is typed into the box.

Preference – Delay Search.

If “Delay Search” is NOT selected in the Setup Preferences, the lead list will change as each letter/number is typed in the “Find” box, continuously narrowing the list to match what has been typed in the “Find” box.

If “Delay Search” is ON in the Setup Preferences, the lead list will remain unchanged until you are finished typing the desired text and press Tab on your keyboard. At that time, the search items will be activated and the lead list will be reduced to include only the leads that match the criteria.

When a lead has been marked “joined” or “cold”, they will no longer appear in the Lead list. However, you can still find these leads by typing a plus sign (+) in the find box before the name or number.

You can use the minus sign (-) to exclude certain text. Example: to generate a list of leads that did not come in on a buddy pass, type -buddy pass in the find box.

You can combine these symbols to do a very specific list. Example: You need to find a lead named Smith that you know was marked “cold”. You also remember that he did not live in Raytown. (Most of our leads in the demo data are from Raytown). You would type “+Smith –Raytown”.

### Profiting from the Leads section

You can email leads by selecting “Send email to List” from the “Menu” drop down list in the upper right corner of the Leads window. To send to all leads with an email address, select “All” from the drop down “Find” menu in the top center, then “Send email to List”. (This will not send an email to leads marked “Joined” or “Cold”). To send an email to a certain group of leads, type the word(s) in the “Find” box that will narrow the list to who you want to send the email to, then “Send email to List.”

You can print address labels for the leads. We recommend that once a month you send a postcard, letter or newsletter to all of the leads. You can do this by opening your leads window from the “File” menu. Then select “Print” from the “File” menu. Select “Mailing Labels” and click on the “Print” button. You will then be asked if you want to exclude certain groups of people. If you want to send to these people, uncheck them from the list. Then click “okay”. The labels are formatted for the Avery 5160 address labels.

To get a list of all the leads so that you can call them, open the “Leads” window, then select “Print” from the “File” menu and select “Lead List” from the resulting window. Then click “Print”. This will result in a list of the leads that are currently displayed in the “Lead” window. This list will include phone numbers and reminders.

### PRINTING FROM THE LEADS LIST

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Select “Leads” from the “File” menu. Select who you want included in the list or labels by clicking on the drop down “find” box in the upper center of the screen. You can choose “all”, “reminders due” or “reminders set”. Then select “Print” from the “File” menu. You will have the following options:

**Lead List** – This will print a list of the leads that are currently listed in the lead window. The printed list will have the same information that shows in the lead window: name, phone number, date and time to follow-up, what to do and the date the reminder was set up. To print this, click on “lead list” and then click “print.”

**Mailing Labels** – This will print mailing labels for your leads. These labels will be formatted for the Avery 5160 labels. To do this, click on “mailing labels” then click “print”. A window will open asking you if you want to exclude “joined leads”, “cold leads” or “leads without a mailing address.” The default will have all of these boxes checked. If for some reason you want to print labels for one of these groups, simply click on the box to uncheck it. The bottom of the box will tell you how many lead labels will be printed. Click “OK.”





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## Converting a Lead to a Student

Open Leads by clicking on File and selecting Leads.



Find the lead you want to make a student by typing the name or part the name in the “Find” box.



Open the lead by double clicking on the selection in list.

**David Doan & Christina Fotovich**

Father: First  Last  Work Phone   Joined

Mother:     Cold

Family Name

Home Phone  Email

Address

Source

Student Name(s)

| First   | Last     | DOB        | Age | Girl                                | Joined                   |
|---------|----------|------------|-----|-------------------------------------|--------------------------|
| Luke    | Doan     | 05/16/1997 | 9   | <input type="checkbox"/>            | <input type="checkbox"/> |
| Lindsey | Fotovich | 01/06/2002 | 4   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
|         |          |            |     |                                     |                          |

Notes  
5/18/06 - TD - walked \$20. First class will b remind her tomorrow.

Reminders | Memberships

| Date       | Action    | Time    | Done                     | Note  |
|------------|-----------|---------|--------------------------|---|
| 05/19/2006 | 1st Class | 7:15 PM | <input type="checkbox"/> | Luke's First Class                                  |
| 05/19/2006 | 1st Class | 5:30 PM | <input type="checkbox"/> | Lindsey's first class                               |
| 05/19/2006 | Call      | 3:00 PM | <input type="checkbox"/> | Remind Christina to bring Luke and Lindesy to class |
|            |           |         |                          |   |

Click the Memberships tab above the Reminders section.



The following screen will open:

1. Select all students that are joining now:

| First   | Last     | DOB        | Age | Girl                                    | Joining                      |
|---------|----------|------------|-----|---|------------------------------|
| Luke    | Doan     | 05/16/1997 | 9   | <input type="checkbox"/> Yes            | <input type="checkbox"/> Yes |
| Lindsey | Fotovich | 01/06/2002 | 4   | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> Yes |
|         |          |            |     |   |                              |
|         |          |            |     |   |                              |
|         |          |            |     |   |                              |

2. Enter the start date, end date, and rank:

Start Date:  End Date:  Rank:

3. Then click the Join button:

Reminders | Memberships

+

| Date | Begins | Ends | Persons | Description |
|------|--------|------|---------|-------------|
|      |        |      |         |             |
|      |        |      |         |             |

Select the students that are joining by checking the Yes box.

1. Select all students that are joining now:

| DOB        | Age | Girl                                    | Joining                                 |
|------------|-----|---|---|
| 05/16/1997 | 9   | <input type="checkbox"/> Yes            | <input checked="" type="checkbox"/> Yes |
| 01/06/2002 | 4   | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> Yes            |

Enter the Start Date and End Date for the membership the student is joining. This can be left blank if you will be creating a contract for them to sign immediately.

2. Enter the start date, end date, and rank:

Start Date:  End Date:  Rank:

(This is an example of our 2-week trial course.)

Choose the rank the student will be when starting. This will default to white, as this is the rank for most students. You can change it for students transferring into your school.

Then click the Join button.



Note: The above steps assume that the Start/End Date and the Rank for each Student in the list are to be the same. If any of this information is different for multiple students, do NOT check the “Joined” (“Yes”) box for the Student whose information is to be different. Instead, check only the box(es) for the Student(s) to which the current information (dates and rank) applies. Then click the “Join” button. The selected Student(s) will be “Joined” using that set of information. This will take you back to the “Prospects” detail window. Now, click “Join” again. The “Select students to join” window will now list only the remaining Students who were not “joined” in the previous steps. Repeat the process for the next Student(s). Repeat this process until all Students from this Lead record have been “joined”.

Your lead is now a student, and you can now close out of this lead by pressing the X in the top right corner of the lead. You should open the student and enter his/her programs and uniform and belt size. As well as any money received. The Programs are on the main student screen; sizes and money received are under the “Order” tab. These tabs are covered more fully in the “Using the Student Section” portion of this manual.



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## Using the Student Section

The Student Section is the window that will automatically open whenever you open SMP.

Find Button (this is followed by an empty box that you can use instead of the button for basic searches. We will cover how to do this later.) – This will find a group of students. Clicking on this will open a new box. Select the appropriate search criteria:

All – This will list all students. Select it by clicking once, then click find.

By Name – This will give you a box to search for a student by a particular name. Select it by clicking once, then click find. (Note: This is easier to do by typing in the name in the “Find” box on the student menu. If you are looking for an expired student, simply type a “+” sign before their name.)

Expired – This will give you a list of all expired students. Select it by clicking once, then click find.

Inactive Only – This will give you a list of all inactive students. Select it by clicking once, then click find.

Attendance – This is a very versatile search. Use the following steps:

1. Select it by clicking once, then click find.
2. Enter the number of days you want to know if they have or have not attended.
3. Chose “Have” or “Have Not” attended.

Example 1: You want to know if you have any students who have not attended class in the last two weeks. Enter 14 in the days box, and then click on the “have not” button. The resulting list will be the students who have not been to class in the last 14 days.

Example 2: You need to know who has been to class this past week. Enter 7 in the days box then click the “have” button.

By Attendance New –You can search for students who attended in a certain month. You will first be prompted to enter a year, then month (this should be done as a number, i.e. June would be 6)

By Program – Select and click find.

Chose the appropriate button on the right - “and” (Find students participating in all the selected programs) or “or”(Find students who participate in Any of the selected programs).

Select the appropriate program from the list on the left by clicking it once, and then click the arrow on top that points toward the empty box. Continue doing this until you have all the programs that you need to find in the box on the right. To remove one program from the find list, simply click on it once and click the lower button (the arrows pointing to the left.)

Click “find”. This will produce the list of the requested information.

By Rank - Select and click find. The new window will have several options.

- a. You can choose “color belts” or “Black Belts” and these ranges will automatically go into the boxes below.
  - b. You can manually select a range of ranks using the arrows on the “from” and “to” boxes. After making your selection, click “find.”
  - c. Use the “Specific” tab to choose individual ranks. Select the rank you want to exclude and click the top arrow ( > ). This will move only that rank to the “exclude” box. By clicking the arrow below, all ranks below the one you have selected will be moved to the “exclude” box. If you wanted to find yellow and red belts, it would be easiest to do that by clicking on “(no rank)”, the first on the list and then clicking the second arrow. This will move all ranks to the “exclude” box. Then click on “7 yellow R” and click the third button ( < ). This will move your yellow recommends to the “include” box. Do the same for yellow decideds, red recommendeds, and red decideds.
4. By Classes since testing – Select and click find. You will now have a new box.
    - a. Click the appropriate box – have or do not have.
    - b. You may click the box next to “enough classes to test” OR you can enter a number into the “at least \_\_ Classes”.
    - c. Estimate future classes - You may click the box and then enter the testing date and it will estimate who will have the number of classes that you chose in number 2. Clicking Search will give you a list based on your criteria.
  5. Tiny Tigers – This will give you a list of all your tiny tigers. (You may also do this search by typing “tiger” in the “find” box on the student screen. If you are looking for an expired tiger, you can type in a “+” sign and then the word “tiger”)
  6. With Balance Due – This will give you a list of all students showing an outstanding balance.
  7. With Pictures – This will give you a list of all students that you have pictures for.
  8. Without Pictures – This will give you a list of all students who do not have a picture associated with their record.
  9. Other – this allows you to create a search. Our example will be that you want to find all of your 8 year olds in a particular zip code. Select age by clicking on it once, then click “is equal to” and type “8” in the value box at the bottom. Then click the “And” button at the bottom of the box. Now click “add line” and select “zip”, click “is equal to” and enter the zip in the value box at the bottom.

Finally, click “query” in the lower right corner of the window. This will generate a list matching your criteria. You can add as many criteria as you wish. Note: if a thing you want to search for is not in the box on the left, select “All Tables” from the “Available Fields” drop down box. Then open the correct table to make your selection. In the example above, the “Age” would be under “Students” and the “Zip” would be under “Families”. Remember, the Student record only keeps track of what applies uniquely to an individual student. His address, etc, applies to his entire family and would therefore be part of his “family” record.

- b. “Find” followed by an empty box. Type in any part of the student’s or parents first or last name to find a student. You can also find by anything in the student record, including programs, zip codes, etc.
  - i. Note: to find inactive students, type a “+” sign before the name. The SMP default will only find active students.
  - ii. Type a “-“ minus sign will search for all records that do not include this. Example: Typing “yellow –tiger” will find all yellow belts that are not Tigers. Note: Make sure not to type a space after the minus sign. If you do, you will get a list with nothing on it because all records will have a space in them somewhere.
- c. Contains – if this box is checked, the find box will find anything that contains what you type allowing you to type a partial name. If it is unchecked, you will need to type the entire name, etc.
- d. Sort – this will determine the order the students will appear. The default is the students’ expiration date.
  - i. Expiration -This is NOT their expiration with headquarters. This is the date their membership with you expires.
    - 1. Names appearing in Red have reached or passed their expiration date.
    - 2. Names appearing in Blue expire within the next 7 days.
    - 3. Names appearing in Black have expiration dates more than 7 days from today.
  - ii. Name – This will produce an alphabetical list by last name.
  - iii. Rank – Sorts by rank, highest to lowest.
  - iv. Program – Sorts by program.
  - v. Newest First – This will put them in the order they joined, starting with the newest student first and the oldest student last.
  - vi. Red, Yellow, and Green –This is one of the most useful sorting tools and should be used at least once a week. This will put the students who haven’t been coming regularly (red) at the top, the semi-regular students (yellow) in the middle and the student with good attendance (green) at the bottom. Each of the students will have the appropriate color dot before their name. These are the preferences that you set up. (Directions for setting up these ratings are in this manual under Setup
  - vii. Attendance - ?
  - viii. Other – This will allow you to chose your own criteria for sorting. Select a field by clicking on it once, then click the green arrow to move it to the

“ordered by fields” box. You can continue to add things that you want sorted by until you have each category that you need, then click “order by” and it will sort by those orders. Example: If you want a list of students by age, then alphabetical; Choose “Age” and click the green arrow. Then select “last” and click the green arrow button. Then click “order by”. The resulting list will have the students listed – youngest to oldest- and then alphabetical – within that.

e. Menu:

- i. Add New Student – This should rarely be used. It is always best to join a student from the leads. However, if you click on this it will give you a blank student record allowing you to fill in all the information.
- ii. Send Email to List – This will allow you to send an email to all listed students whose email address is in the database. (Provided you have internet). When you select this, a new window will appear.
  1. Drag any email addresses for students that you do not wish to send an email to the Exclude box.
    - a. From – type in the email address to which the students should reply.
  2. Subject and Message – Type your subject and Message here.
  3. Attachments – Use this if you wish to send any attachments. Clicking the plus button will open a window for you to select the file or document you wish to attach. Choose it, then click OK.
  4. “Send with SMP” – If you Click this button the program will automatically send the email as long as you have sent this up in the preferences section.
  5. “Send Manual” will send the document to your email program so that you can send it from there. Note: Some email programs are not able to receive data this way and may scramble it. If this happens to you, send the email using SMP.
- iii. Manage Barcodes – This will allow you to print barcode labels for your students. (All labels will be formatted to standard Avery 5160 labels.) When you select this, a new window will open with three tabs.
  1. The first tab is “automatic”.
    - a. You can choose an alphabetic prefix for the barcode (Many schools use this to keep track of when the bar codes were created.)
    - b. Selecting “Create barcodes for these students” will create barcodes for the students who are currently listed in your student window.
    - c. “Create this many unassigned barcodes” will allow you to create and print barcodes that have not been assigned to any students. These can be attached to a new student as they join. The first time these barcodes are scanned, the computer will ask which student the barcode is to be associated with. You will then be able to select the correct student and it will be permanently attached to that student and you will not need to do anything further.
    - d. You can then click “Create and print” to print the barcodes and, if you have chosen to do so, assign them to specific students.

2. The second tab is “Manual”. This is not usually the recommend way to create barcodes. It is used the same as “automatic”, however, you would chose the numbers that are created.
3. The third tab is “Existing Barcodes”. By entering a prefix or suffix, if you use them, you can locate a certain group of barcodes to either reprint or delete. If you do not use the prefix or suffix, it will reprint or delete all barcodes. Caution: This will delete these barcodes from the students’ records and they will no longer be valid for attendance.

Export Mail Merge – this will allow you to export all addresses to a Word Processing program in order to do a mail merge letter.

You will first be asked if you want to export the names and addresses that are currently shown to a mail merge file. Click yes.

You will then be asked if you want to do one letter per family or student. Click the appropriate button.

Now you will be asked to name the file and show where you would like to save it. After naming it, save it

Follow your Word Processing programs procedures for Mail Merge, using the file you have just created for names and address.

Export Birthdays – this will allow you to get a list of Student birthdays for any given month. When you select this:

- a. A new window will appear asking you to enter the month (1-12) for which you want the birthdays. After entering that number, click OK.
  - b. It will then ask if you want to include inactive students (Sending these guys a birthday card or special Birthday offer is a great way to stay in touch). Click no or yes.
  - c. A new window will appear that will ask you for the name you want to save this document under. Example: May birthdays. If you do not wish to save this list, click cancel. Otherwise Choose where you want it saved, name the file and click Save.
  - d. If you did not save this list, your student list will now show each student who has a birthday that month.
  - e. If you saved the list, a window will open asking if you want to print address labels for this student. From here you can print address labels to put on birthday cards for each student.
  - f. The saved list will show each student’s name and birthday.
  - g. Your student list will now show each student who has a birthday in the requested month.
- iii. Add to Testing – This is the best way to begin a new testing, but it can also be used to add one or several students to a testing. We will cover the best

way to add individual or even several students to a testing in the testing module.

1. Before Choosing this, Find the student or students that you wish to test, by typing either a students name or name of program you wish to test in the Find box in the upper left corner. Example: “Joe Smith” or “Adults”. You can use the “Select” feature to choose a large number of people. This will be covered in the next section.
2. A list of these people or the person will appear. Then select Add to Testing from the Menu list.
3. A Window will appear asking if you want to schedule these # of students to test. Answer OK or cancel. If you click OK,
4. A new window will appear giving you two options,
  - a. Add to Existing Testing – Click on the down arrow and a list of all existing testings will appear. Click the correct one and then click OK.
  - b. Schedule a New Testing – Only do this if there is not already a testing scheduled you wish to add these students to.
    - i. Date – This is the date when the actual testing will happen.
    - ii. Description – This is a name that you will recognize for this testing. Example: Adults, Tigers, All, etc.
    - iii. Submit Date – This is the date on which you will send your results to headquarters. Example: You will test your tigers on the 19<sup>th</sup>, Kids and Adults on the 20<sup>th</sup> and Black Belts on the 21<sup>st</sup>, with a make-up testing on the 22<sup>nd</sup>. If you enter a submit date of the 23<sup>rd</sup> on each of these testings, SMP will automatically combine all testings for the reports for Headquarters, including calculating family discounts – even though Mom tested the 20<sup>th</sup>, Junior tested on the 19<sup>th</sup> and Dad tested with the Black Belts on the 21<sup>st</sup>.
    - iv. Click New

Add to Tournament – This will add all students shown to a tournament.

You will first be asked to select a tournament. If the tournament has not already been setup, choose “New”.

A window will open for you to fill in all information about the tournament. When you have done this, close the window and the student list will be scheduled for the tournament. You will be able to find this tournament, print registration, etc by going to the “File” menu and selecting “Tournaments”.

- iv. Record Attendance for Student – this will allow you to record attendance for the selected student easily – This is great to record attendance of one or two students.
  1. Type the name of the student in the Find Box. (If this person is the parent of another student, both names will appear. You need to highlight this student by clicking on their name one time.)
  2. Then Select Record Attendance for Student.

3. A window will open asking if you wish to record attendance for this student.
  4. Click OK and the attendance will be recorded. If this is the wrong student, click Cancel.
- v. New Sale – This is a great way to put in a new sale.
1. Find the student making the purchase by either typing their name into the find box or by highlighting their name by clicking it once from the student list.
  2. Select New Sale from the Menu.
  3. A new window will open up – This is the Sale window. Enter the new sale in this window. How to do this will be covered more fully in the Merchandise section.

“Select” box – This will enable you to choose certain students for testings, tournaments, etc. To use this feature, click on the box.

A new bar will open across the top of your student list. ALWAYS BE SURE TO CLICK “UNCHECK ALL STUDENTS” BUTTON BEFORE STARTING ANY NEW SEARCH! If you do not do this, the students previously selected from other searches will remain on this search – even if you do not see them in the current student list. This feature is designed to let you chose multiple students from multiple lists, therefore, once students have been selected, they will remain selected until you click the “uncheck all students” button.

You may now go down the list and check each student that you want to appear on the final list. After you have done this, click the “Show Only Checked Students” button. This will give you a list of all students you have selected. You may now add them to testing, tournament, etc using the menu button.

This is one of the best ways to create a testing and is covered more fully in the “testing section” of this manual. It is a very powerful way to create a specific list. Here is an example: I want to send a “You did awesome” postcard or a letter encouraging students to upgrade to Black Belt Club. At the end of my tiger basic class, I go use the “select” feature. After clicking the “uncheck all students” button, I type “tiger basic” in the “find” box. All of my students in that group are now listed. I can check the names of each student I want to send the letter to. Now after my kids basic class, I type “kid basic” into the box and have a list of those students – I do not click the “uncheck all students” button this time because these students are still part of the previous list. I can now check each of the students from my kid’s basic class that I want the letter to go to. Now I click the “Show Only Checked Students”. I now have a list I want to send the letter to. By choosing “Print” from the “File” menu, I am now able to print address labels for these students.

- f. Displayed information – Along the top of your student list, the categories of information displayed is shown.
- i. Red, Yellow and Green dots – This category is not listed at the top. This shows you quickly if that student’s attendance has been bad (red), marginal (yellow) or good (green).
  - ii. First and Last Name – Certain colors and underlining in this field can tell you a great deal of information at a glance.
    1. Red – This student’s membership with you (not headquarters) is expired. They need to be renewed or upgraded ASAP. The goal is to never have any red students.
    2. Blue – This student’s membership with you will expire in 7 days or less. Time to renew or upgrade, before they turn red!

- 3. Black – This student will not expire for more than 7 days.
- 4. Underlined – This student has not yet reached the day they are eligible to begin classes; i.e., they signed up to begin on Jan 10 and today is Jan 9.
- iii. Rank – Shows you a picture of their belt.
- iv. Age
- v. Expires – This tells you when their membership with you will expire. This is not the ATA membership expiration.
- vi. Account number – This shows you their account number with whatever billing company or system you use.
- vii. ATA number
- viii. Program – This will list all programs that student is currently in.

### PRINTING FROM THE STUDENT LIST

Open the Student List by selecting “Students” from the file menu. Use the “find”, “select” and “menu” features to generate a list of students that should be in this print job. (How to do this is covered in another section of the manual.) Once you have the list of desired students showing in the “Student List”, go to the “file” menu and select “print”. A window will open showing the things available for printing. To print, click the desired item and click print.

Student List – This will simply print the list that is currently showing in the Student List. (It will not print the picture of the belt.)

Mailing Labels – These labels will be formatted to fit on the Avery 5160 labels. You can choose if you want to print a label for each student or one for each family.

Attendance Summary – This will give you a list of students who attended classes for a certain period of time. You will be asked if you want for all students or for the selected students. After you choose one of these, a new window will open so that you can enter the dates you want the report to cover. Once these dates have been entered, click “print.”

Attendance Charts – This will enable you to print a variety of charts. When you select it, a window will open. First fill in the dates you want to chart. Then use the drop down arrow to select if you want to chart by the day, week or month. Checking the “unique students” will chart the actual students who came to class, if it is not checked, the chart will reflect actual class attendance. To better explain: Joey came to 10 classes during the time you want to chart. If you click “Unique Students”, Joey will only be counted once – giving you the actual number of students who came to class for that time period. However, if you do not click “Unique Students”, each of Joey’s 10 classes will be charted. (Of course, the results would be multiplied by all students and their classes.) Click “chart” and the chart will be generated in the large box to the right. To print this chart, click “print”.

Attendance Rating Report – This is one of the most important reports and we recommend that you use it at least once a week. Selecting this will generate a list of students by their attendance. The report will have all of the “red” students at the beginning. The list will show the student’s name, parent’s name, phone number and the date of their last class. This makes it easy to call students who haven’t been to class and so are in danger of dropping out.

Attendance Cards – You will be asked if you want to print attendance cards for each of the students appearing in the student window and will tell you how many there are. Then you will be asked if you

want the student's rank on the card. When printing, you will need to select the "landscape" option. Three cards will print on each sheet. Some people use card stock, cut them and use just like that. Others chose to laminate the cards.

Statements – You will be asked if you want to print statements for the family or for the individuals. This will then print statements for anyone with an outstanding balance.

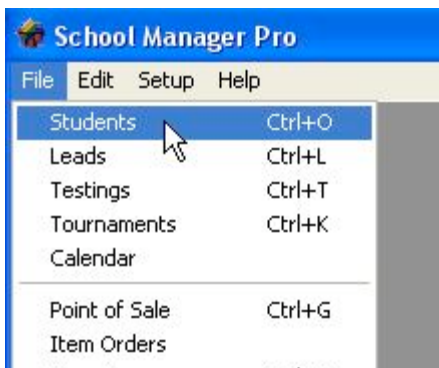
Statement Summary – This is the same as above; however, if a student or family has more than one outstanding invoice, SMP will consolidate them into one statement with a total balance due.

Family Class Schedule – If you have kept the "schedule" section in your "setup" file, you can print out a schedule showing when each member of the family will have classes.

Demographics Report – You can generate a demographic report for all students showing in your student window, or for all students including inactive ones.

## ACCESSING A STUDENT RECORD

Click File and select Students from the drop down menu.



A search box will appear.



Type the name of the person you are looking for. (In this example we will search on the students we entered from "Making a Lead a Student". You will notice that it finds both Luke Doan and Lindsey Fotovich. Lindsey's father has the last name Doan, so it pulls her up as being associated with that search criteria.)

2 of 128 Students [Tim & Mona Daniels - 2207]

Find  ?  Contains Sort

| First                                | Last            | Rank                 | Age | Expires         | Account |
|--------------------------------------|-----------------|----------------------|-----|-----------------|---------|
| <input type="radio"/> <u>Lindsey</u> | <u>Fotovich</u> | <input type="text"/> | 4   | <u>06/02/06</u> |         |
| <input type="radio"/> <u>Luke</u>    | <u>Doan</u>     | <input type="text"/> | 9   | <u>06/02/06</u> |         |

Double click the desired student's name.

First  Last   Female Rank

Birthday  Age  ATA #  ATA Exp.

Membership Start  Expires   Inactive

Account #

Family **407**

|           | First  | Last                                  | Work Pho                                 |
|-----------|--|---------------------------------------|--|
| Father    | <input type="text" value="David"/>             | <input type="text" value="Doan"/>     | <input type="text" value="816-510-"/>    |
| Mother    | <input type="text" value="Christina"/>         | <input type="text" value="Fotovich"/> |  |
| Home Pho  | <input type="text" value="816-356-9905"/>      |                                       | Email <input type="text" value="Doan@"/> |
| Address   | <input type="text" value="11835 W 88th Terr"/> |                                       |  |
| City/St/Z | <input type="text" value="Kansas City"/>       | <input type="text" value="MO"/>       | <input type="text" value="64115"/>       |
| Account # | <input type="text"/>                           |                                       |  |

Notes (Student)  Notes (Family)

All of the information that we entered as a lead is transferred to the student's record for the entire family. On the left side of the screen is all the information pertaining to that student, such as Name, Birthday, Age, ATA Number and Expiration date. Also, the Membership Start and End Date that we entered when we joined them as a lead will show. Changing any information on this side of the Student record only changes it for the name listed at the top.

- Date of Rank – This date will automatically be filled in each time they test for a new rank.
- Inactive – Check this box if the student is no longer coming.
- Email (on the left side of the screen) – this is the student's email address

Programs – This is the list of programs in which the student is currently enrolled. Double click in the programs box.

The screenshot shows a software interface for a student profile. At the top, a blue header bar reads "Student: Lindsey Fotovich". Below this are "Prev" and "Next" buttons. A navigation menu includes "Main", "Orders", "Attendance", and "Membr". The form contains several input fields: "First" (Lindsey), "Last" (Fotovich), "Birthday" (01/06/2002), "Age" (4), "ATA #" (empty), and "ATA Exp." (00/00/00). To the right of these fields are labels for "Men", "Sta", and "Exp". Below the form is an "Email" field and a "Programs" section with an empty list box and a mouse cursor pointing to it.

A list of the saved programs will appear. Double click on the first one you wish to add to this student.

This screenshot shows the "Programs" section of the student profile form. It features a list box titled "Select a Program:" containing two entries: "Black Belt Club" and "Tiny Tigers". A mouse cursor is positioned over the "Black Belt Club" entry, indicating it is ready to be selected.

In this example we will add the Tiny Tiger designation.

The screenshot shows a software interface for a student profile. At the top, a blue header bar reads "Student: Lindsey Fotovich". Below this are "Prev" and "Next" buttons. A navigation menu includes "Main", "Orders", "Attendance", and "Mer". The form contains several input fields: "First" (Lindsey), "Last" (Fotovich), "Birthday" (01/06/2002), "Age" (4), "ATA #" (empty), "ATA Exp." (00/00/00), and "Email" (empty). On the right side, there are partially visible labels "Me", "S", and "E". At the bottom, a "Programs" section contains a list box with "Tiny Tigers" selected, and a mouse cursor is hovering over it.

Now we can add another program if needed. This Tiny Tiger is in Black Belt Club, so I will also add BBC to their programs.

The screenshot shows a "Select a Program:" window for a student named Luke Doan. It features a list box with two items: "Black Belt Club" and "Tiny Tigers". The "Black Belt Club" item is highlighted in blue, and a mouse cursor is pointing at it.

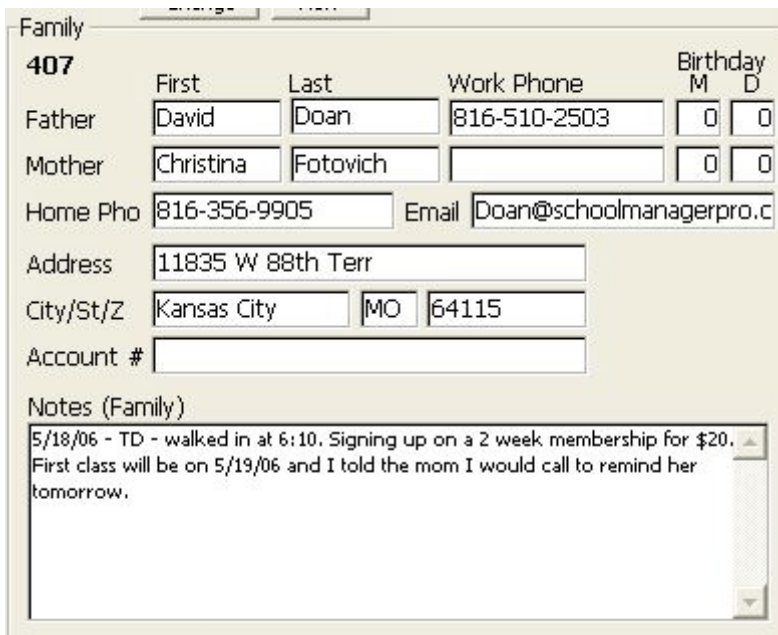
Now the student is in both BBC and Tiny Tiger. You can do the same for Kid and Adult programs. Then add Basic, Leadership, Master Club, BBC Elite, Kickboxing and/or XMA to each student.

To remove a student from a program, double click on that program in the Program box. A new window will appear, if it says the right things, click OK.

- d. Photo – You can add a photo of the student.
- i. Use a digital camera to take the picture and load it your computer according to the camera/computer instructions.

- ii. Click Load on the student's information page, select the picture and then click open.
- iii. Notes (Student) – This is for notes that are specific to this student. They will not appear on the family record.

On the right side of the screen is all family information shared between the members of the family, such as parents, address, etc. Changing any information on this side of the student record WILL change it for ALL students in this family.



Family  
407

|        | First     | Last     | Work Phone   | Birthday |   |
|--------|-----------|----------|--------------|----------|---|
|        |           |          |              | M        | D |
| Father | David     | Doan     | 816-510-2503 | 0        | 0 |
| Mother | Christina | Fotovich |              | 0        | 0 |

Home Pho: 816-356-9905      Email: Doan@schoolmanagerpro.c

Address: 11835 W 88th Terr

City/St/Z: Kansas City    MO    64115

Account #:

Notes (Family)

5/18/06 - TD - walked in at 6:10. Signing up on a 2 week membership for \$20. First class will be on 5/19/06 and I told the mom I would call to remind her tomorrow.

**Birthday** – Some schools like to keep track of the parents' birthdays and send them cards. Enter only the month and day of their birthdays.

**Account #** - This is their account number for whatever billing company or system you chose.

**Notes (Family)** – Anything typed here will appear in this box on each member of the family. Example: Millers will be on vacation until June 12. By typing this in the family notes section it will appear on each of the Millers' records.

The Family Number, as shown below, is what connects the family members together. It is vitally important that all family members with the same Family Number. This is how School Manager Pro keeps track of three or more family members for discounts on testings, ATA memberships, and tournaments. This number is automatically assigned by SMP when joining the students from a lead. If you join each family member individually, you will have to click "change" and put in the family id number for that family. If this student is for some reason no longer a part of that family, you can click "new" to assign him a new family number. (Example: Joey moved away from home and is now paying for his own classes.)



Notice that there are two places to put an email. The one on the right is for the Student's email address and the one on the left is for the family/parent email address.

Since data is transferred over when you convert from a lead, the only information that should be blank is the "ATA #" "programs" and "account number." Of course you will not have the ATA or account numbers for a brand new student at this time, so we will just fill in the "programs".

---

## Menu Drop Down Box

This is the last feature on the individual "Student Record". From this menu, you can choose to email the student, email the family, show available schedules or delete the student.

Both the "Email Student" and "Email Family" choices will produce the same window. The upper left section will list all email address available. If you do not want to send to any of these addresses, select it and drag it to the upper right section labeled "Exclude". Enter your email address in the "From" section and fill out the "subject" and "message" fields. You can send attachments on your email by clicking on the plus "+" button next to the attachments field. You can then choose to send the email using SMP or you can send it through your email program by choosing "Send Manual".

"Show Available Schedules" will show what classes are available for this student, if you have kept the schedule current in the "Setup", "Schedules" section.

"Delete Student" is a feature we strongly recommend you NEVER use. Instead of deleting the student, mark them "inactive" on the "Main" tab of the student record. You never know when the student may return. Only a school owner can delete a student.

That is an overview of the "Main" tab of the Student Record. Next is the Orders tab.



## Orders

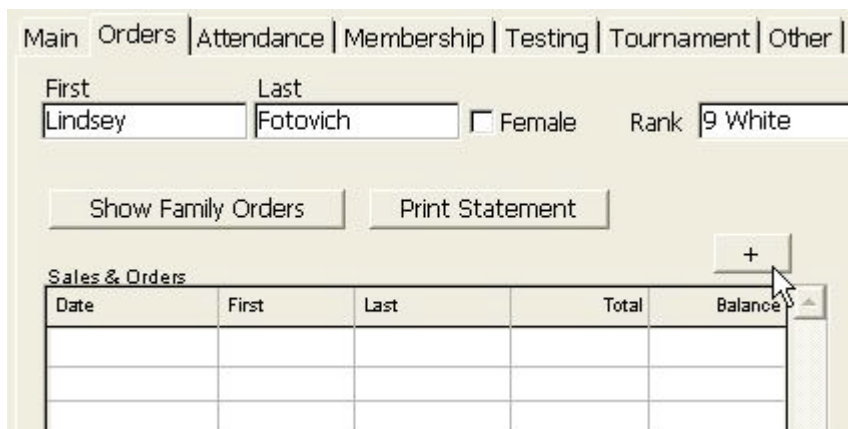
We will continue using our example from the previous section “Student Info” for this section.

From the student record, click on the “Orders” tab.



You will see a window for that student’s orders. This will include a list of previous orders, options to see orders for the whole family or print a statement. It will also include Student and Family discounts. You can fill this in to automatically give either this student or his family a discount on all orders. Also on this page, is a place to enter known sizes. Be sure to put in the belt size, as that will be needed to generate a belt order when you create a testing.

To add a new order, press the + button.

A screenshot of the 'Orders' page in a web application. At the top, there is a navigation bar with tabs: 'Main', 'Orders', 'Attendance', 'Membership', 'Testing', 'Tournament', and 'Other'. Below the navigation bar, there are input fields for 'First' (Lindsey) and 'Last' (Fotovich). There is a checkbox for 'Female' which is unchecked, and a 'Rank' field with the value '9 White'. Below these fields are two buttons: 'Show Family Orders' and 'Print Statement'. At the bottom right, there is a '+' button. Below the '+' button is a table titled 'Sales & Orders'. The table has five columns: 'Date', 'First', 'Last', 'Total', and 'Balance'. The table is currently empty.

| Date | First | Last | Total | Balance |
|------|-------|------|-------|---------|
|      |       |      |       |         |
|      |       |      |       |         |
|      |       |      |       |         |

This pulls up a blank order. If this student is in a program that gives a discount on merchandise, the discount will be displayed next to the word “discount”. If for some reason you do not want them to have this discount on ANY part of the order, you can delete it manually. (We will cover items that should not have a discount in the inventory section.) If you want to give a discount (sale, etc.) you can put that percentage in manually.

**Sale: Lindsey Fotovich 1448**

Date:   Complete Discount:  %

**Lindsey Fotovich**

+ - Find

Items | Payments |

| Code | Description | Order | Coming | Arrived | Qty | Price | Extend |
|------|-------------|-------|--------|---------|-----|-------|--------|
|      |             |       |        |         |     |       |        |
|      |             |       |        |         |     |       |        |
|      |             |       |        |         |     |       |        |
|      |             |       |        |         |     |       |        |
|      |             |       |        |         |     |       |        |
|      |             |       |        |         |     |       |        |
|      |             |       |        |         |     |       |        |
|      |             |       |        |         |     |       |        |

Notes (print on receipt) Non-Printing Notes 427

Subtotal 0.00  
6.975% Tax 0.00  
Total   
Payments 0.00  
Balance Due

< > Delete Print  Receipt Printer

You may want to sell the student an item or a package. We covered putting together a package in the “setup” portion of this manual.

To add an order for a package, click the “find” button and then the “package” tab on the resulting window. This will give you a list of all the packages you offer. Select the one you need. The new window will show a list of “package components”. Clicking on each one will generate a list of all items offered for this component – an example would be a list of each size of headgear. Click on the one you want for this student. By going through this list in order, you can make sure that you don’t forget to include something the student needs. As you select each item, it will appear on the list on the right side of the window. Once you have selected each item that you need, click the “sell” button

on the bottom of the screen. This will automatically fill in the invoice with each item at the price set up for that package. Be sure to mark the “order” box next to any item that you don’t have in stock.

There are four ways to enter an item. You can scan the barcode for the item if you use them. (Using barcodes for sales is covered in the inventory section of this manual.)

If you are not using a barcode, click the + sign. If you know the part number, you can add it that way. Enter the part number in the “code” column and then use your “tab” key on your keyboard. SMP will fill in everything else. (Note: these part numbers are the numbers used by WMA or Century. This is convenient if someone is ordering from one of these categories. It is also a good way to double check that you are ordering the exact item you want from the vendor.)

Alternatively, tab to the “description” field and type a few words, such as “dragon tiger ssahng”. SMP will search the inventory. If there is only one item that has all of these words, it will automatically fill in the line with that item. If there are more than one, a new window will open that will list each of these. Double click on the one you need. (Note: if you don’t get any results, check spelling and/or broaden your search – “dragon tiger”.)

Don’t forget to click the “order” box if you don’t have this item in stock.

|        |         |                                 |                    |                          |       |
|--------|---------|---------------------------------|--------------------|--------------------------|-------|
| 316065 | Weapons | Protech Dragon Ssahng Jeol Bong | Blue Tiny Tiger 9" | <input type="checkbox"/> | 25.00 |
|--------|---------|---------------------------------|--------------------|--------------------------|-------|

If this doesn’t work or you don’t know how to spell the item you need, click the find button.



This will pull up a search screen.

Inventory | Packages |

Find   Contains

| Code   | Category    | Name                            | Description |
|--------|-------------|---------------------------------|-------------|
| METPC2 |             | Metrologic Barcode Scanner (PC, | Black       |
| 043301 | Action Wear | Action Wear Jacket              | Small       |
| 043302 | Action Wear | Action Wear Jacket              | Medium      |
| 043304 | Action Wear | Action Wear Jacket              | XLarge      |
| 043305 | Action Wear | Action Wear Jacket              | XXLarge     |
| 043303 | Action Wear | Action Wear Jacket              | Large       |
| 043505 | Action Wear | Athletic Pants                  | XXLarge     |
| 043501 | Action Wear | Athletic Pants                  | Small       |
| 043504 | Action Wear | Athletic Pants                  | XLarge      |
| 043502 | Action Wear | Athletic Pants                  | Medium      |
| 043503 | Action Wear | Athletic Pants                  | Large       |
| 043101 | Action Wear | Athletic Shirt (Mesh shirt)     | XXLarge     |
| 043104 | Action Wear | Athletic Shirt (Mesh shirt)     | XLarge      |
| 043103 | Action Wear | Athletic Shirt (Mesh shirt)     | Large       |
| 043102 | Action Wear | Athletic Shirt (Mesh shirt)     | Medium      |
| 043101 | Action Wear | Athletic Shirt (Mesh shirt)     | Small       |
| 042404 | Action Wear | Athletic Tank Top               | XLarge      |
| 042403 | Action Wear | Athletic Tank Top               | Large       |
| 042402 | Action Wear | Athletic Tank Top               | Medium      |
| 042401 | Action Wear | Athletic Tank Top               | Small       |
| 042524 | Action Wear | Crew Neck Tee Black             | XLarge      |
| 042523 | Action Wear | Crew Neck Tee Black             | Large       |
| 042522 | Action Wear | Crew Neck Tee Black             | Medium      |

Find

Sort

For our example, we will search for Ssahng Jeol Bong.

| Code   | Category  | Name                            | Description         |
|--------|-----------|---------------------------------|---------------------|
| 31509  | Reference | Double Ssahng Jeol Bong \vdeo   | Form                |
| 31521  | Reference | Student Ssahng Jeol Bong \vdeo  |                     |
| 31210  | Reference | SSahng Jeol Bong Manual         |                     |
| 31608  | Weapons   | Protech Ssahng Jeol Bong        | Karate Kids 9"      |
| 31607  | Weapons   | Protech Ssahng Jeol Bong        | Tiny Tiger 8"       |
| 31606  | Weapons   | Protech Ssahng Jeol Bong        | Adult 12"           |
| 316066 | Weapons   | Protech Dragon Ssahng Jeol Bong | Red Tiny Tiger 9"   |
| 316065 | Weapons   | Protech Dragon Ssahng Jeol Bong | Blue Tiny Tiger 9"  |
| 316064 | Weapons   | Protech Dragon Ssahng Jeol Bong | Red Karate Kid 10"  |
| 316063 | Weapons   | Protech Dragon Ssahng Jeol Bong | Blue Karate Kid 10" |
| 316062 | Weapons   | Protech Dragon Ssahng Jeol Bong | Red Adult 12"       |
| 316061 | Weapons   | Protech Dragon Ssahng Jeol Bong | Blue Adult 12"      |
| 31507  | Reference | SSahng Jeol Bong \vdeo          | L1 Inst             |
| 31508  | Reference | SSahng Jeol Bong \vdeo          | L2 Inst             |

If you want to narrow your search criteria, add a minus “-“ symbol to a key word. The example below shows taking out the videos when searching for Ssahng Jeol Bong.

| Code   | Category  | Name                            | Description         |
|--------|-----------|---------------------------------|---------------------|
| 31210  | Reference | SSahng Jeol Bong Manual         |                     |
| 31608  | Weapons   | Protech Ssahng Jeol Bong        | Karate Kids 9"      |
| 31607  | Weapons   | Protech Ssahng Jeol Bong        | Tiny Tiger 8"       |
| 31606  | Weapons   | Protech Ssahng Jeol Bong        | Adult 12"           |
| 316066 | Weapons   | Protech Dragon Ssahng Jeol Bong | Red Tiny Tiger 9"   |
| 316065 | Weapons   | Protech Dragon Ssahng Jeol Bong | Blue Tiny Tiger 9"  |
| 316064 | Weapons   | Protech Dragon Ssahng Jeol Bong | Red Karate Kid 10"  |
| 316063 | Weapons   | Protech Dragon Ssahng Jeol Bong | Blue Karate Kid 10" |
| 316062 | Weapons   | Protech Dragon Ssahng Jeol Bong | Red Adult 12"       |
| 316061 | Weapons   | Protech Dragon Ssahng Jeol Bong | Blue Adult 12"      |

If you compare the two searches, the second one is missing the items that have the word "video" in their Name or Description.

To narrow your search or to make it easier –lets face it, very few people know how to spell Ssahng Jeol Bong- you can select a category from the drop down window on the right side of the screen. For our example we would select weapons. Then scroll down the list until you find the weapon you need and double click on it.

To select, double click the item. This adds it to the order.

**Sale: Lindsey Fotovich 1448**

Date:   Complete Discount:  %

**Lindsey Fotovich**

+ - Find

Items | Payments

| Code   | Description                                  | Order                    | Coming                   | Arrived                  | Qty | Price | Extend |
|--------|--|--------------------------|--------------------------|--------------------------|-----|-------|--------|
| 316062 | Protech Dragon Ssahng Jeol Bon Red Adult 12" | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1   | 25.00 | 25.00  |
|        |  |                          |                          |                          |     |       |        |
|        |  |                          |                          |                          |     |       |        |
|        |  |                          |                          |                          |     |       |        |
|        |  |                          |                          |                          |     |       |        |
|        |  |                          |                          |                          |     |       |        |

Notes (print on receipt) Non-Printing Notes 427

|  |  |                    |                |
|--|--|--------------------|----------------|
|  |  | Subtotal           | 25.00          |
|  |  | 6.975% Tax         | 1.74           |
|  |  | <b>Total</b>       | <b>\$26.74</b> |
|  |  | Payments           | 0.00           |
|  |  | <b>Balance Due</b> | <b>\$26.74</b> |

< > Delete Print  Receipt Printer

If it is an item that needs to be ordered, then you need to check the box marked Order.

| Code | Description   | Order                               | Coming                   | Arrived                  | Qty |
|------|---------------|-------------------------------------|--------------------------|--------------------------|-----|
| Bon  | Red Adult 12" | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1   |

This will add it to a PO that we will later print off to send to the vendor of your choice.

At the bottom right of the sale is the total with tax.

|             |                |
|-------------|----------------|
| Subtotal    | 25.00          |
| 6.975% Tax  | 1.74           |
| Total       | <b>\$26.74</b> |
| Payments    | 0.00           |
| Balance Due | <b>\$26.74</b> |

To receive a payment, press the Payment tab at the top center of the order.

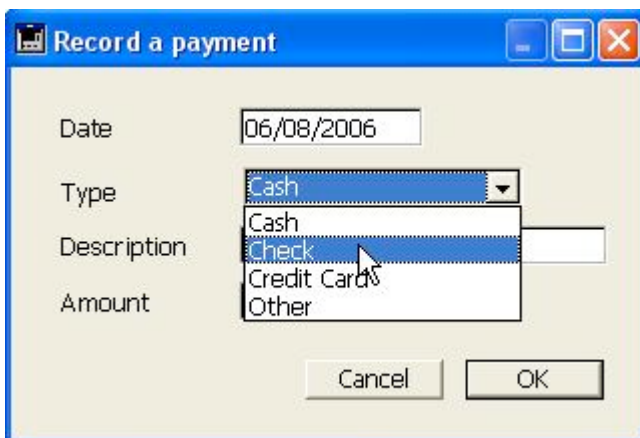


Press the “plus” button.

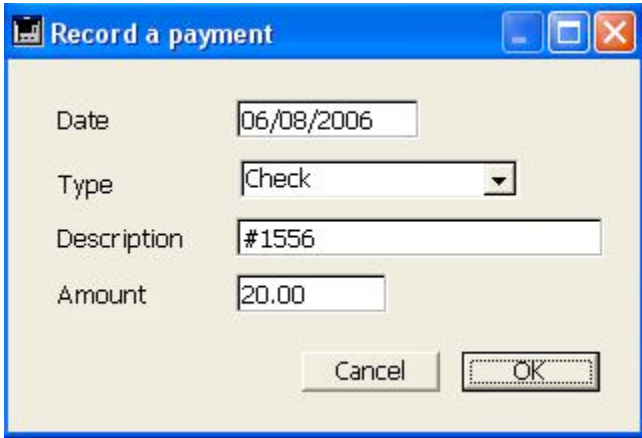


The date will default to the date the order was created; if the payment was made on another day, manually change it. The “type” field has a drop down box. The description can be anything you want. Note: anytime we use “other” as a type, we enter what it was in this box. Example: credit for overpayment, gift certificate, etc.

In the following example, we are going to receive two payments. The first will be a check for \$20.00.

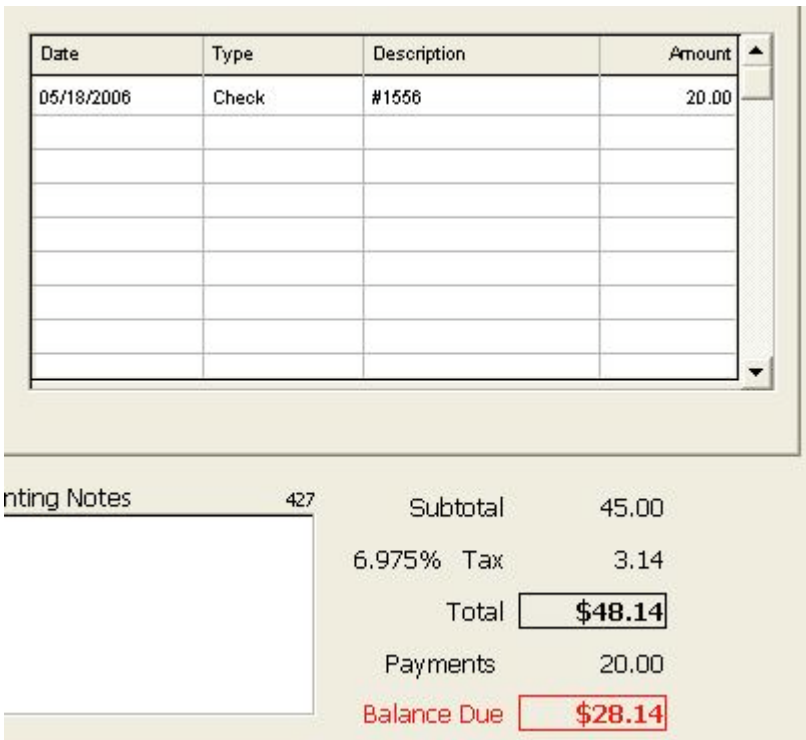


Check #1556 for \$20.00



A dialog box titled "Record a payment" with a blue title bar and standard window controls. It contains four input fields: "Date" with the value "06/08/2006", "Type" with a dropdown menu showing "Check", "Description" with the value "#1556", and "Amount" with the value "20.00". At the bottom are "Cancel" and "OK" buttons.

Notice that the balance due at the bottom has changed.



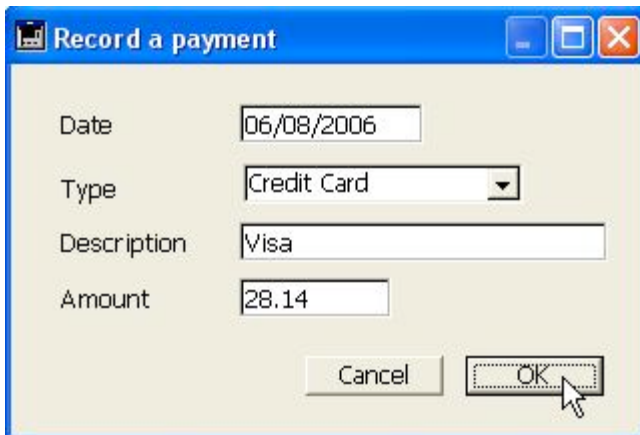
A summary screen showing a table of transactions and a calculation of the balance due. The table has columns for Date, Type, Description, and Amount. Below the table is a section for "Printing Notes" with a text area and the number "427". To the right of the notes is a summary of payments and taxes.

| Date       | Type  | Description | Amount |
|------------|-------|-------------|--------|
| 05/18/2006 | Check | #1556       | 20.00  |
|            |       |             |        |
|            |       |             |        |
|            |       |             |        |
|            |       |             |        |
|            |       |             |        |
|            |       |             |        |

Printing Notes 427

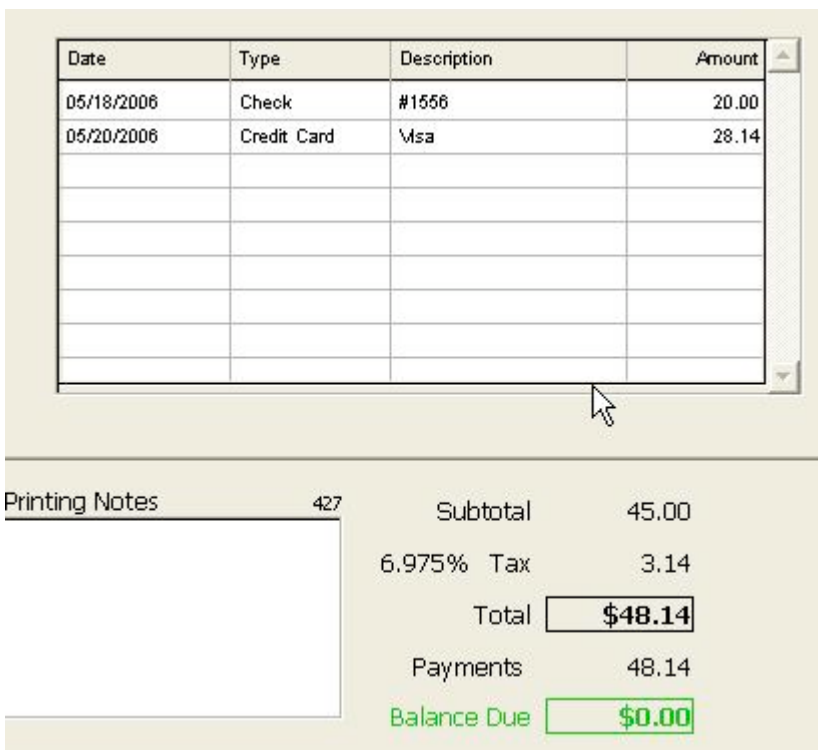
|                    |                |
|--------------------|----------------|
| Subtotal           | 45.00          |
| 6.975% Tax         | 3.14           |
| <b>Total</b>       | <b>\$48.14</b> |
| Payments           | 20.00          |
| <b>Balance Due</b> | <b>\$28.14</b> |

Next we add a Visa for the balance when the item comes in on the 20th. Notice when this example was created, they forgot to change the date, so it still shows the date the order was created.



A dialog box titled "Record a payment" with a blue title bar. It contains the following fields: "Date" with the value "06/08/2006", "Type" with a dropdown menu showing "Credit Card", "Description" with the text "Visa", and "Amount" with the value "28.14". At the bottom, there are "Cancel" and "OK" buttons. A mouse cursor is pointing at the "OK" button.

The balance will now show \$0.00



A summary screen showing a table of payments and a calculation of the balance due. The table has four columns: Date, Type, Description, and Amount. It lists two payments: a check for \$20.00 on 05/18/2006 and a Visa credit card payment for \$28.14 on 05/20/2006. Below the table, a "Printing Notes" field is on the left, and a summary of payments and the balance due is on the right. The "Total" is \$48.14 and the "Balance Due" is \$0.00.

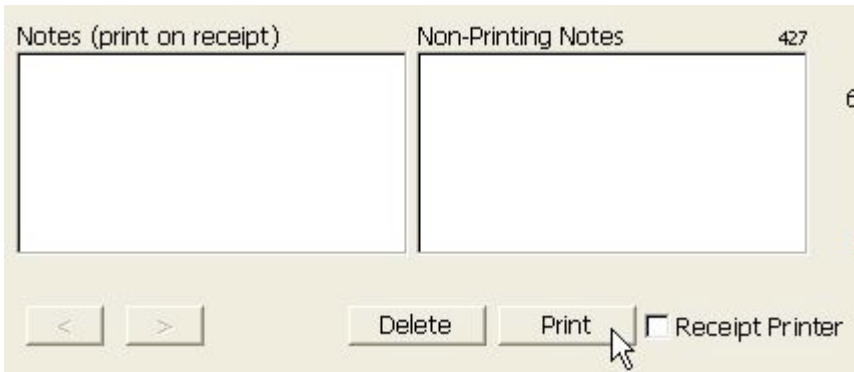
| Date       | Type        | Description | Amount |
|------------|-------------|-------------|--------|
| 05/18/2006 | Check       | #1556       | 20.00  |
| 05/20/2006 | Credit Card | Visa        | 28.14  |
|            |             |             |        |
|            |             |             |        |
|            |             |             |        |
|            |             |             |        |
|            |             |             |        |

Printing Notes 427

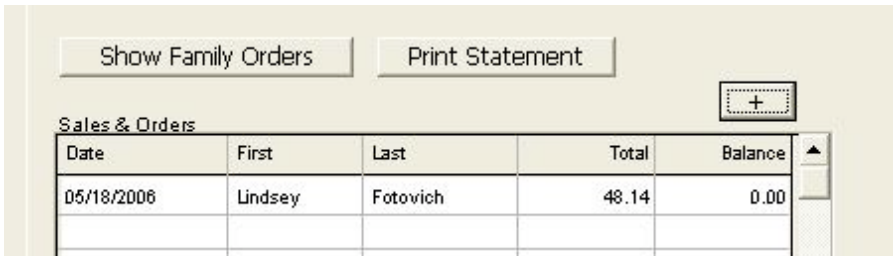
Subtotal 45.00  
6.975% Tax 3.14  
Total **\$48.14**  
Payments 48.14  
Balance Due **\$0.00**

You can type notes that will either print or not print on the invoice. An example of a note that you may want to type in the left box to print on the invoice could be: “Thank you for your order” or “Sorry your order was delayed. Use this receipt as a coupon for 5% off your next order. An example of what you may want to print on the right side to not print on the receipt would be: “Don’t let Bobby pick up this order without getting full payment from parents.” Or “This is a present for Bobby’s dad. Don’t give it to anyone except Bobby’s mom.”

The print button will print a professional invoice that you can hand to your customer. If you have a receipt printer, check the “receipt printer” box.



The student record will now list this order.



| Date       | First   | Last     | Total | Balance |
|------------|---------|----------|-------|---------|
| 05/18/2006 | Lindsey | Fotovich | 48.14 | 0.00    |

That is an overview of the Orders Record.



---

## Student Attendance

There are several ways to record attendance for your students. The easiest and fastest way is with a bar code scanner. The recommended scanner for School Manager Pro is available on our website at <http://www.schoolmanagerpro.com/store/scanner.html> However, if you have a barcode scanner already. You can use it.

There are two ways to use a scanner to record attendance. First, you can have the students scan their card as they arrive at class or you can collect the cards in class and scan them all at once. To do this, select “batch scan barcodes” from the file menu. Scan the barcodes and click done when you are finished. If you do not click done, the information may not be saved. The recorded attendance from these cards will be listed under the Attendance section of the status window located on the main screen.



If you do not have a scanner you can still record attendance.

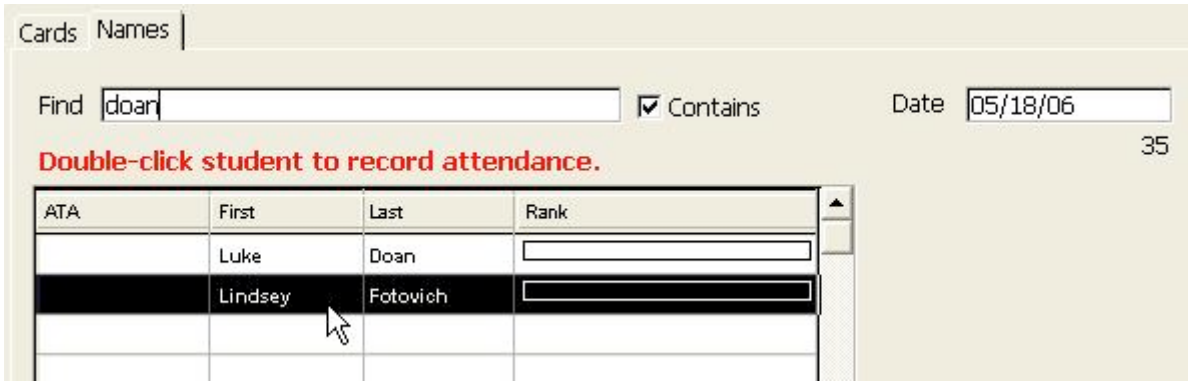
Click File and select Record Attendance.



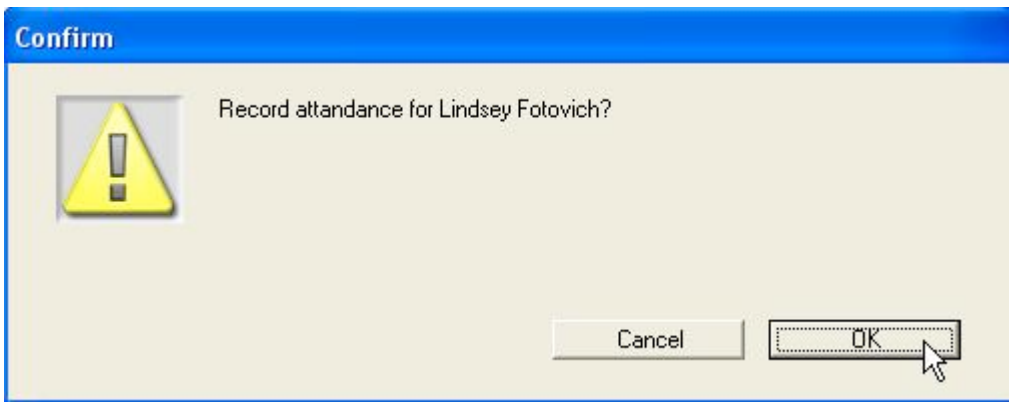
Click on the Names tab.



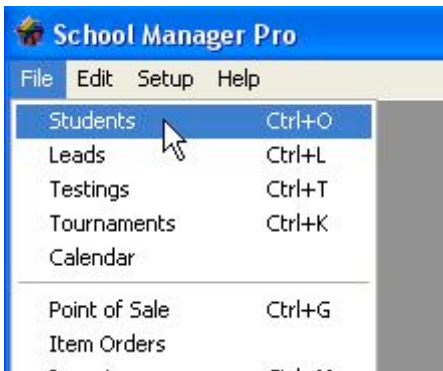
Type the name or part of the name of the person. (If you have “delay search” selected in your preferences, you will need to use the tab key on your keyboard to start the search.) SMP will return a list of students matching what you typed. Double click the student you want to record.



Click ok to confirm that you have the right student. Continue this process until all students are recorded.



To view a student's attendance record, click File and select Students from the drop down menu.



Type the name of the name of the person in the box next to the word “find”. (In this example we will look up the attendance record for “Luke Doan”)

2 of 128 Students [Tim & Mona Daniels - 2207]

Find  ?  Contains Sort

| First          | Last            | Rank                 | Age | Expires         | Account |
|----------------|-----------------|----------------------|-----|-----------------|---------|
| <u>Lindsey</u> | <u>Fotovich</u> | <input type="text"/> | 4   | <u>06/02/06</u> |         |
| <u>Luke</u>    | <u>Doan</u>     | <input type="text"/> | 9   | <u>06/02/06</u> |         |

Double click the student record.

Student: Luke Doan

Prev Next

Main | Orders | Attendance | Membership | Testing | Tournament | Other |

First  Last   Female Rank

Birthday  Age  ATA #  ATA Exp.

Membership Start  Expires   Inactive

Account #

Family **407**

|           | First  | Last                                  | Work Ph                                 |
|-----------|--|---------------------------------------|---|
| Father    | <input type="text" value="David"/>             | <input type="text" value="Doan"/>     | <input type="text" value="816-510"/>    |
| Mother    | <input type="text" value="Christina"/>         | <input type="text" value="Fotovich"/> | <input type="text"/>                    |
| Home Pho  | <input type="text" value="816-356-9905"/>      |                                       | Email <input type="text" value="Doan"/> |
| Address   | <input type="text" value="11835 W 88th Terr"/> |                                       |   |
| City/St/Z | <input type="text" value="Kansas City"/>       | <input type="text" value="MO"/>       | <input type="text" value="64115"/>      |
| Account # | <input type="text"/>                           |                                       |   |

Notes (Student)

Notes (Family)

5/18/06 - TD - walked in at 6:10. Signing up on a 2 week First class will be on 5/19/06 and I told the mom I would tomorrow.

Click the Attendance tab.

Main | Orders | Attendance | M

First Last

This will show a list of every time this student's attendance was recorded.

Main | Orders | Attendance | Membership | Testing | Tournament

First  Last   Female Rank | Date | Time | Card Code |
| --- | --- | --- |
| 08/10/2004 | 8:07 PM | B0010 |
| 08/12/2004 | 8:33 PM | B0010 |
| 08/16/2004 | 8:50 PM | B0010 |
| 08/17/2004 | 8:53 PM | B0010 |
| 08/19/2004 | 1:06 PM |  |
| 08/23/2004 | 9:09 AM | B0010 |
| 08/24/2004 | 8:57 PM | B0010 |
| 08/26/2004 | 9:05 PM | B0010 |
| 09/27/2004 | 2:08 PM | B0010 |
| 09/29/2004 | 2:29 PM | B0010 |
| 10/02/2004 | 1:06 PM |  |
| 10/04/2004 | 12:40 PM | B0010 |
| 10/05/2004 | 9:00 AM | B0010 |
| 10/07/2004 | 8:40 PM | B0010 |
| 10/25/2004 | 4:33 PM | B0010 |
| 10/26/2004 | 8:43 PM | B0010 |
| 11/16/2004 | 4:46 PM | B0010 |
| 11/17/2004 | 10:59 AM | B0010 |
| 11/22/2004 | 9:26 PM | B0010 |
| 11/23/2004 | 9:01 PM | B0010 |

It will also show how many classes he has averaged over a month, since joining, and the total amount of classes since the last testing.

Ave. Classes Per Week

In the past month:

Since joining:

Classes Since Last Testing:

In the lower right hand corner is a list of all the barcode numbers associated with this student. You don't need to do anything with this. It is for informational purposes only. (You do have the option of adding a barcode for this student here; however, this is not the best place to do that. Barcode assignments will be dealt with in another section of this manual.







## Memberships

**NOTE: SMP STRONGLY ADVISES THAT YOU USE MEMBERSHIP AGREEMENT EVEN IF THE STUDENT IS DOING A PAID IN FULL. THE WORDING IN THE AGREEMENT CAN PROTECT YOU IN THE EVENT OF A LAWSUIT IF SIGNED BY THE PARENT/STUDENT.**

You can create as many quotes as you would like for a student. For example, if we have a family coming in and we think Billy will join leadership, but Sue will do BBC; we will prepare a quote for that before they even come in. But of course we really want Sue to join leadership as well so we will also create a quote for if she decides to do that. You can even print these agreements before your appointment with them and they can sign the appropriate one without having to wait on the printer. You would then only have to select the appropriate membership agreement and click “signed”.

To create a membership for a student, click File and select Students from the drop down menu.

Type the name of the student. Double click the student record.



2 of 128 Students [Tim & Mona Daniels - 2207]

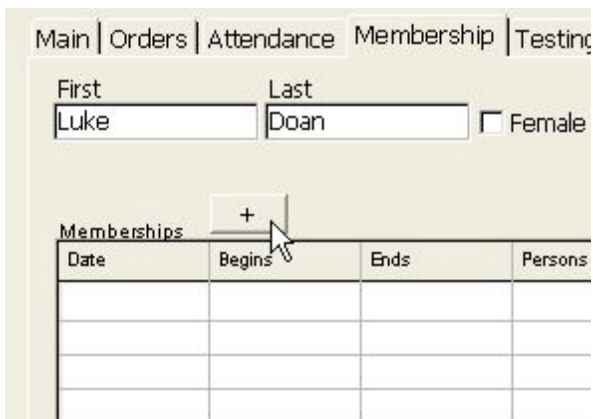
Find  ?  Contains Sort

| First   | Last                     | Rank                 | Age | Expires                  | Account |
|---|--------------------------|----------------------|-----|--------------------------|---------|
| <input type="radio"/> <a href="#">Lindsey</a> | <a href="#">Fotovich</a> | <input type="text"/> | 4   | <a href="#">06/02/06</a> |         |
| <input type="radio"/> <a href="#">Luke</a>    | <a href="#">Doan</a>     | <input type="text"/> | 9   | <a href="#">06/02/06</a> |         |

This will open the student record. Click the Membership tab, which is the tab at the top center of the student record.



Click on the + button.



Main | Orders | Attendance | Membership | Testing

First  Last   Female

Memberships

| Date | Begins | Ends | Persons |
|------|--------|------|---------|
|      |        |      |         |
|      |        |      |         |
|      |        |      |         |

This will open the screen with the membership information that will need to be filled out in order to generate a contract/membership agreement. In the “Description” field, enter a description that will

remind you later what this membership does. This is the information that will show up in the list of memberships. The example below says, "basic". If you are doing what we mentioned earlier and preparing multiple options before an appointment, name them something like "Bob Leadership, Sue BBC" or "Leadership". This way you can choose the appropriate agreement from the list. This information DOES NOT appear anywhere on the membership agreement.

The screenshot shows a window titled "New Membership" with a standard Windows interface. The window contains a form with the following fields and values:

- Membership | EFT / Coupons | 328
- Description: Basic
- Today's Date: 05/18/2006
- Membership Begins: 06/03/2006
- Membership Ends: 12/03/2006
- Length (months): 6
- Membership Cost: 1028
- First Payment Due: 06/03/2006
- Down Payment: 200
- Last Payment Due: 11/03/2006
- Amount Financed: 828
- Payment Day: 3rd
- Number of Payments: 6
- Payment Amount: 138.00
- Rate Calculation: 79, 59
- Students Included: Luke Doan, Lindsey Fotovich

At the bottom of the window, there are several buttons and a checkbox:

- Print
- Print Blank
- Use Custom Form
- ASF
- Delete

Enter the date the membership begins. The date that will default into this box is the date the student's current membership ends.

Membership Begins: 06/03/2006


Next, enter the number of months this membership is to last.

Length (months): 6

SMP will automatically calculate and fill in the “ends” date.

|            |   |   |
|------------|---|---|
| Membership | Begins                                  | Ends                                    |
|            | <input type="text" value="06/03/2006"/> | <input type="text" value="12/03/2006"/> |

There are two methods for entering the cost information. The first we will go over is if you have a program that has a specific price for the entire program. For example: A six-month basic program costs \$515.00. The second is if you have a monthly cost instead. Example \$79/month for the first student and \$59/month for the second.

From here to the diamond is for the first method. If you are using the second method, skip to the following diamond. 

Enter the total cost of the program. Include any down payments in the total.

|                 |                                  |
|-----------------|----------------------------------|
| Membership Cost | <input type="text" value="515"/> |
|-----------------|----------------------------------|

Next fill in the field marked Down Payment. (If this is a paid in full, enter the entire program cost in this box.)

|              |                                  |
|--------------|----------------------------------|
| Down Payment | <input type="text" value="200"/> |
|--------------|----------------------------------|

Then enter the Number of Payments. (If this is a paid in full, enter “0”.)

|                    |                                |
|--------------------|--------------------------------|
| Number of Payments | <input type="text" value="6"/> |
|--------------------|--------------------------------|

Monthly Payment Amount will calculate automatically.

|                |                                     |
|----------------|-------------------------------------|
| Payment Amount | <input type="text" value="138.00"/> |
|----------------|-------------------------------------|

Skip to the second diamond  in this section.



Now we will discuss the second method of entering billing information.

New Membership 328

Membership | EFT / Coupons |

Description: Basic  Signed  Quote

Today's Date: 05/18/2006

Membership Begins: 06/03/2006 Ends: 12/03/2006

Length (months): 6

Membership Cost: 1028 First Payment Due: 06/03/2006

Down Payment: 200 Last Payment Due: 11/03/2006

Amount Financed: 828 Payment Day: 3rd

Number of Payments: 6

Payment Amount: 138.00 Rate Calculation: 79, 59

Students Included: Luke Doan, Lindsey Fotovich

Print Print Blank  Use Custom Form ASF Delete

Leave membership cost blank. If there is a down payment in addition to the monthly fee enter it in the “down payment” field. Enter the Number of Payments. (If this is a paid in full, enter “0”.)

Number of Payments: 6

In the field labeled “rate calculation” enter the monthly amounts to be paid for each student. Above the first student is \$79 and the second is \$59 per month. You can add as many as you need. Once you have entered this information, use the “tab” key on your computer keyboard. The program will automatically calculate the payment amount and total amount due.



Make sure that the date in the “first payment due” field is accurate. It will default to the day the membership begins. However, this date is usually for a different date; i.e., Two weeks or one month from that date.

The last box to be filled out on this screen is the “students included” box. SMP will assume all members of this family are included in this membership. If this is not the case, enter the names of the students who will be covered by this membership and delete any that will not be.

Now you are ready to print. Choose the “print” button to generate a contract with all the information filled in. Remember that if you have changed the wording of your membership agreement in the setup menu, you will need to make sure that the “Use Custom Form” box is checked.

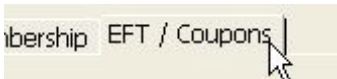


The default membership is similar to SCS's Membership. If you use ASF as your billing company that membership can also be printed. This will print on legal size paper.



### Entering EFT information

At the top of the Membership window is a tab labeled "EFT/Coupons". This tab allows you to fill in EFT and print coupons for your student based on the information you filled out in the membership. You can fill out the requested information to generate an EFT form that is already filled out and ready for a signature.



Example:

The screenshot shows a software window titled "Membership" with a sub-tab "EFT / Coupons". The form contains the following fields and options:

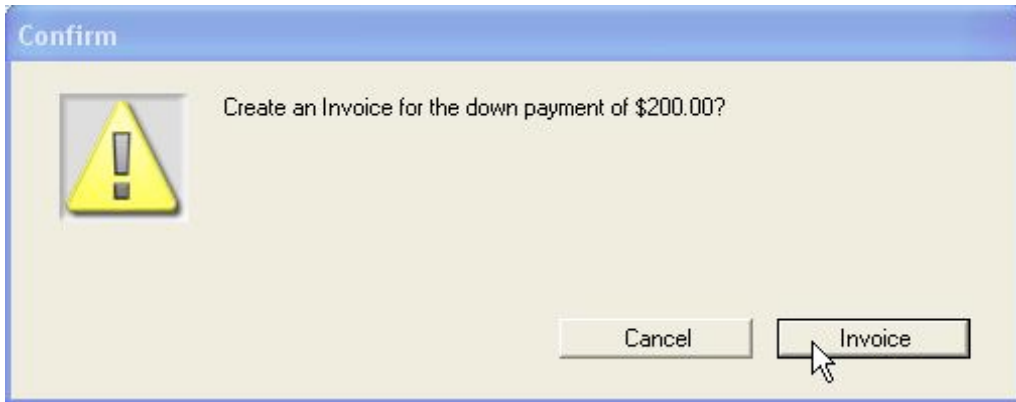
- Checking  Savings
- Bank Name: [Text Box]
- Routing Number: [Text Box]
- Account Number: [Text Box]
- Visa  Mastercard  Amex  Other... [Text Box]
- Card Number: [Text Box]
- Security Digits: [Text Box] Expiration Date: [Text Box]
- First Payment: [06/03/2006] Number of Payments: [6] Payment Amount: [138.00] Payment Day: [3rd]
- Account Holder: [David Doan] Address: [11835 W 88th Terr, Kansas City, MO 64115] Phone: [816-356-9905]
- Additional Notes: [Text Area]

At the bottom of the window are four buttons: "Print EFT", "Print Coupons", "Preferences", and "Delete".

When the member signs the contract it is no longer a quote and you should click on the "Signed" button.

A close-up of the radio button controls. The "Signed" option is selected, indicated by a mouse cursor pointing to it.

You will get a pop up window asking if you would like to create an invoice for the down payment of this membership.



If you click on “Invoice” SMP will generate an invoice in the Student record under the “orders” tab that looks like the one below. You can receive payments, or add to this invoice by following the instructions in the “Orders” section of his manual.

**Sale: Luke Doan 1449**

Date: 05/18/2006  Complete Discount: 0 %

**Luke Doan**

+ - Find

Items | Payments |

| Code | Description        | Order                    | Coming                   | Arrived                  | Qty | Price  | Extend | Tax                      |
|------|--------------------|--------------------------|--------------------------|--------------------------|-----|--------|--------|--------------------------|
|      | Basic Down Payment | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1   | 200.00 | 200.00 | <input type="checkbox"/> |
|      |                    |                          |                          |                          |     |        |        |                          |
|      |                    |                          |                          |                          |     |        |        |                          |
|      |                    |                          |                          |                          |     |        |        |                          |
|      |                    |                          |                          |                          |     |        |        |                          |
|      |                    |                          |                          |                          |     |        |        |                          |
|      |                    |                          |                          |                          |     |        |        |                          |
|      |                    |                          |                          |                          |     |        |        |                          |
|      |                    |                          |                          |                          |     |        |        |                          |
|      |                    |                          |                          |                          |     |        |        |                          |

Notes (print on receipt): \$828.00 balance financed

Non-Printing Notes: 426

Subtotal: 200.00  
 6.975% Tax: 0.00  
**Total: \$200.00**  
 Payments: 0.00  
**Balance Due: \$200.00**

< > Delete Print  Receipt Printer

After doing this, go to the student(s) records that this membership is for. On the main tab, change the “expires” date under “membership” to the correct date. Also, you may need to add or change programs if this was an upgrade.



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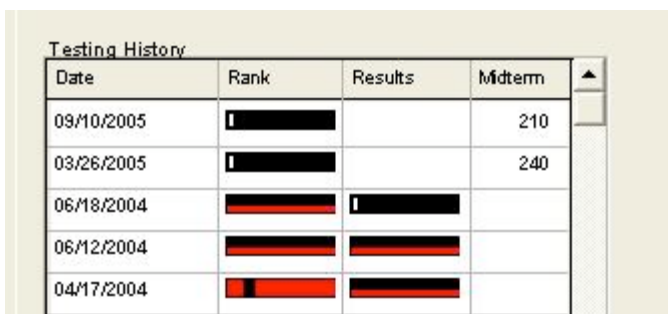
## Testing History

To view a student's testing history, click File and select Students from the dropdown menu. Type the name of the student in the "Find" box. Double click the student's name on the resulting list. (To see pictures of this process, refer to the section of this manual called "Student Info")

Click the "Testing" tab on the resulting Student Record.



The resulting screen will show the student's testing and midterm history.



| Date       | Rank       | Results    | Midterm |
|------------|------------|------------|---------|
| 09/10/2005 | [REDACTED] |            | 210     |
| 03/26/2005 | [REDACTED] |            | 240     |
| 06/18/2004 | [REDACTED] | [REDACTED] |         |
| 06/12/2004 | [REDACTED] | [REDACTED] |         |
| 04/17/2004 | [REDACTED] | [REDACTED] |         |

To learn how to use School Manager Pro to make testings easier, refer to the "Creating a Testing" section later in this manual.





## Tournament History & Information

To view a student's tournament history and other tournament information, click File and select Students from the dropdown menu. Type the name of the student in the "Find" box. Double click the student's name on the resulting list. (To see pictures of this process, refer to the section of this manual called "Student Info")

Click the "Tournament" tab on the resulting Student Record.



It is important that this page be filled out accurately so that SMP can track State and Top 10 points with the ATA and also to ensure tournament registration slips are accurate.



First: Aaron, Last: Daniels, Female, Rank: 1 Black D, Clear, Date: 06/

Competition Rank: [dropdown], Clear

Special Abilities

Height (Inches): 66

Competition Age: 14 on 12/31/05

Leadership: Junior Trainee (R/W/B), Clear

Judging Level: 0

Weapons Judging Level: 0

Tournament Division: Boys, 1st Degree, Ages 14-16

Tournament Year: 2005-2006

[State Champion Standings](#)

Form Sparring Weapons

[World Champion Standings](#)

Form **8** Sparring Weapons **2**

The "Competition Rank" field will default to the student's current rank. If a student is competing up a rank, be sure and enter the rank at which they are competing. Example: A 1<sup>st</sup> Degree will be testing in August for his 2<sup>nd</sup> Degree so has opted to compete in the 2<sup>nd</sup> Degree ring; choose "2<sup>nd</sup> Degree" from the menu.



Competition Rank: [dropdown menu open with options: 2 Black R, 2nd Degree, 3rd Degree]

Special Abilities

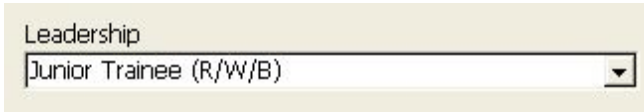
Height (Inches): [input field]

If a student competes in the "Special Abilities Division", check the "Special Abilities" box.

You can also choose to put the student's height in inches into the "Height" field. You only need to do this if your region asks for it on competitor registration forms.

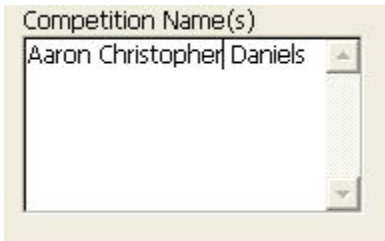
SMP will automatically calculate the student's "competition age", using the student's birthday and the rules for competition age in the current "ATA Tournament Rules".

If this student is in leadership, select the collar they wear.



A screenshot of a web form showing a dropdown menu. The title above the menu is "Leadership". The selected option is "Junior Trainee (R/W/B)".

If their name is spelled different on the ATA website or their middle name is listed, then you need to put that name in the "Competition Name(s)" field



A screenshot of a text input field titled "Competition Name(s)". The text "Aaron Christopher Daniels" is entered into the field.

If you are connected to the internet, SMP will now search and display their World/State standings in this window. In addition, you can click the blue link to each standing and you will be taken to this student's division on ATA's web site, enabling you to see how many points they have. If you have dial-up access, you can click the "check" button while connected to the internet and it will check standings at that time.



A screenshot of a web form section for checking standings. At the top, "Tournament Year" is set to "2005-2006". Below this are two blue links: "State Champion Standings" and "World Champion Standings". A "Check" button is to the right. Under the "World Champion Standings" link, there are three columns: "Form" with a radio button selected, "Sparring", and "Weapons" with a radio button selected.

If this student has judging chevrons, enter the level into the "Judging Level" and "Weapons Judging Level" fields.

If you wish to automatically email the student when standing have been updated, click the box in the "Email Notification of Point Updates" field.

You can also print tournament competitor registration forms from this page. Later we will discuss printing these forms for more than one person at a time. To print for just this student, click the "Print Registration" button. This will open a window asking if you want to print forms for "Traditional (Forms and Sparring), Traditional (Weapons), ATA Xtreme Forms or ATA Xtreme Weapons. Select the one you want to print and click okay. The form will be filled out by SMP with a few exceptions. You will need to mark a box for "Sparring" and/or "Forms", Choose a weapon, mark if this is the 3<sup>rd</sup> or higher family member and, if the student is a tiger, choose which form, how much of it and if the student needs help. After filling in this information, click print in the upper left hand corner.



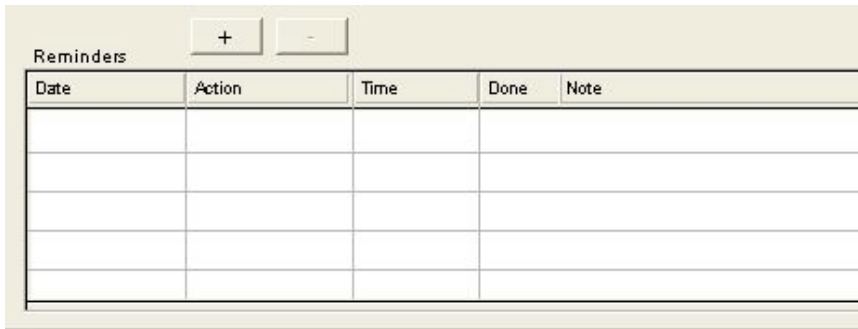


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## Other Tab

There are two purposes for the “Other” tab on the student record. The first is to display custom fields. (Refer to “Setup” “Preferences” “Other” in this manual to do this). The second purpose is to set up reminders for this student.

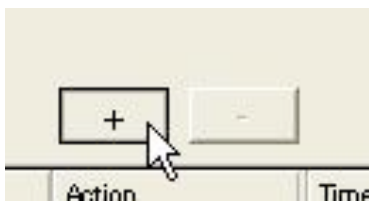
Reminders work for students like the Lead appointments work for leads.



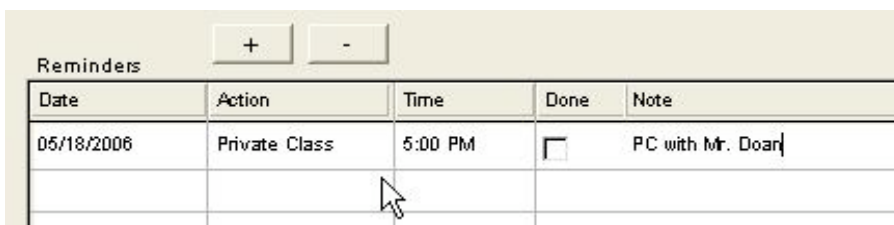
Reminders

| Date | Action | Time | Done | Note |
|------|--------|------|------|------|
|      |        |      |      |      |
|      |        |      |      |      |
|      |        |      |      |      |
|      |        |      |      |      |

To add a student reminder, press the + button.



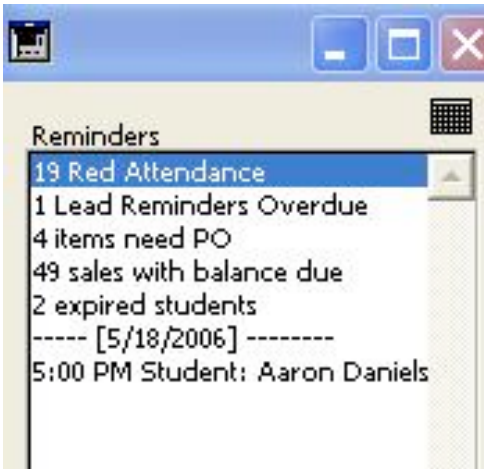
Enter the date, what to action the reminder is for, time of appointment (or time to deal with this reminder) and any notes.



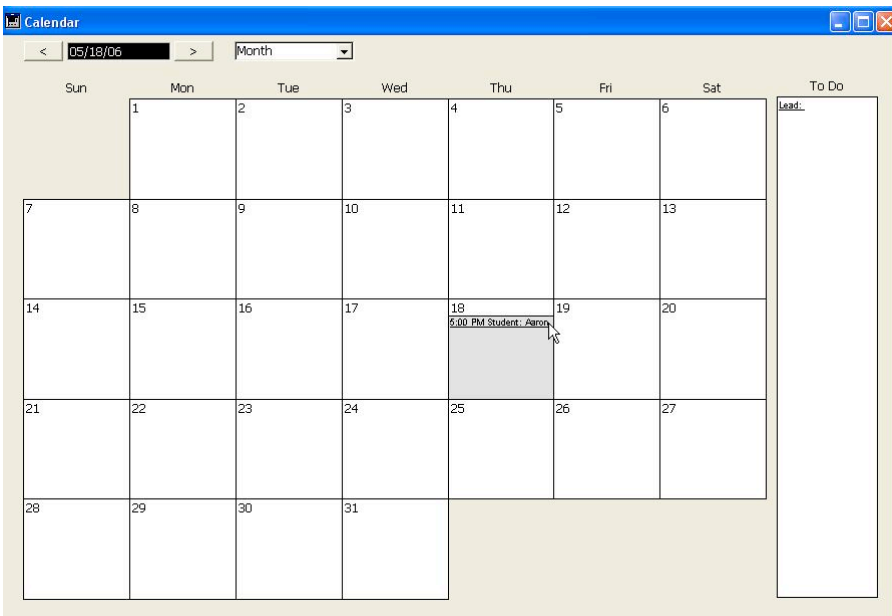
Reminders

| Date       | Action        | Time    | Done                     | Note             |
|------------|---------------|---------|--------------------------|------------------|
| 05/18/2006 | Private Class | 5:00 PM | <input type="checkbox"/> | PC with Mr. Doan |
|            |               |         |                          |                  |

This appointment will now be displayed in your status window (upper right corner of program) the day before the appointment.



It will also show as an appointment on your calendar.



You can now close the Calendar and the Student window by clicking the X in the top right corner of each of those windows.



After the appointment, be sure to click the “done” box in the reminder so that it will not be displayed as an overdue appointment.

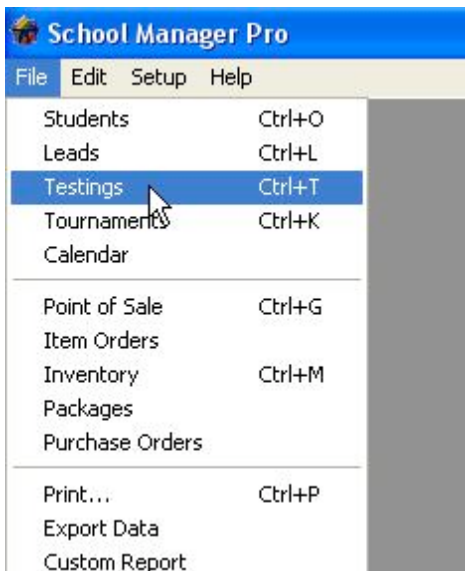


# Testings

## Setting up a Testing

First, decide how you will do the testing. If you are going to have one testing for all of your students, things are simple, just follow the instructions below, ignoring the “multiple testing” instructions. If, however, you are going to have multiple testings – Tigers on Thursday, Kids on Friday and adults on Saturday – things are still simple. Follow the instructions including the “multiple testing” instructions.

Click on File, and then select Testings.

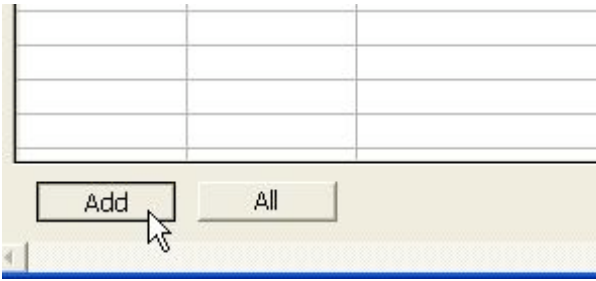


A testing list will appear. This is a list of all the testings you have in your school.

A screenshot of the 'Testings' window in the application. It displays a table with the following columns: Testing Date, Submit Date, Description, City, State, and Closed. The table contains ten rows of testing records.

| Testing Date | Submit Date | Description    | City    | State | Closed                              |
|--------------|-------------|----------------|---------|-------|-------------------------------------|
| 11/12/2005   | 11/15/2005  | Tigers         |         |       | <input type="checkbox"/>            |
| 09/10/2005   | 09/15/2005  | 2005 September |         |       | <input checked="" type="checkbox"/> |
| 07/16/2005   | 07/20/2005  | 2005 July      |         |       | <input checked="" type="checkbox"/> |
| 05/21/2005   | 05/25/2005  | 2005 May       |         |       | <input checked="" type="checkbox"/> |
| 03/26/2005   | 04/06/2005  | 2005 March     | Raytown | MO    | <input checked="" type="checkbox"/> |
| 01/29/2005   | 02/07/2005  | 2005 January   | Raytown | MO    | <input checked="" type="checkbox"/> |
| 12/04/2004   | 12/10/2004  | 2004 December  |         |       | <input checked="" type="checkbox"/> |
| 10/02/2004   | 10/06/2004  | 2004 October   |         |       | <input checked="" type="checkbox"/> |
| 08/07/2004   | 08/18/2004  | 2004 August    |         |       | <input checked="" type="checkbox"/> |

At the bottom of the screen, click “Add” to create a new testing.



The Testing Window will open to the “Info” tab. Fill out each field on this screen. Testing date is the date you will have testing. “Description” enables you to name this testing. Be sure to give it a name that will distinguish it from other testings, such as “Tigers May Testing”. The “Submit Date” is crucial. This is the date you expect to send the results to headquarters. It doesn’t matter if you actually send it on this date, but this date will tie multiple testings together. Example: If the Tigers are testing on 5/22, Kids on 5/23 and Adults on 5/24, you could enter a “Submit Date” of 5/25 in EACH of these three testings. Doing this tells SMP that even though these testings are all on different dates, they are actually the same testing. School Manager Pro can now calculate financial information such as third family discounts, etc.

A screenshot of the "Info" tab for a testing entry. It contains several input fields: "Testing Date" (05/22/2006), "Description" (May Testing), "City" (Raytown), "State" (MO), "Country" (USA), and "Ceremony Date" (05/30/2006). There is also a "Closed" checkbox which is currently unchecked.

Next, add the judges you will have for testing by pressing “Add”.

A screenshot of the "Judges" table. The table has columns for "Number", "Name", "Rank", and "Address". One row is visible with the number 5844, name David Doan, rank 3B, and address Raytown, MO. Above the table are buttons for "Add", "Delete", and "Check". A mouse cursor is pointing at the "Add" button.

| Number | Name       | Rank | Address     |
|--------|------------|------|-------------|
| 5844   | David Doan | 3B   | Raytown, MO |

Now you have two options. You can use the drop down box to pre-fill the information for a judge who has been at your testing before or you can enter the information in the boxes for a new judge. The “number” requested is the Instructor number for this judge.

Add each judge, continuing the process until all judges have been added.

| Judges |              |      |             |
|--------|--------------|------|-------------|
| Number | Name         | Rank | Address     |
| 5844   | David Doan   | 3B   | Raytown, MO |
| 2719   | Tim Daniels  | 3B   | Raytown, MO |
| 5995   | Mona Daniels | 2BD  | Raytown, MO |
|        |              |      |             |
|        |              |      |             |
|        |              |      |             |

Judges Needed: Two 3rd Degrees

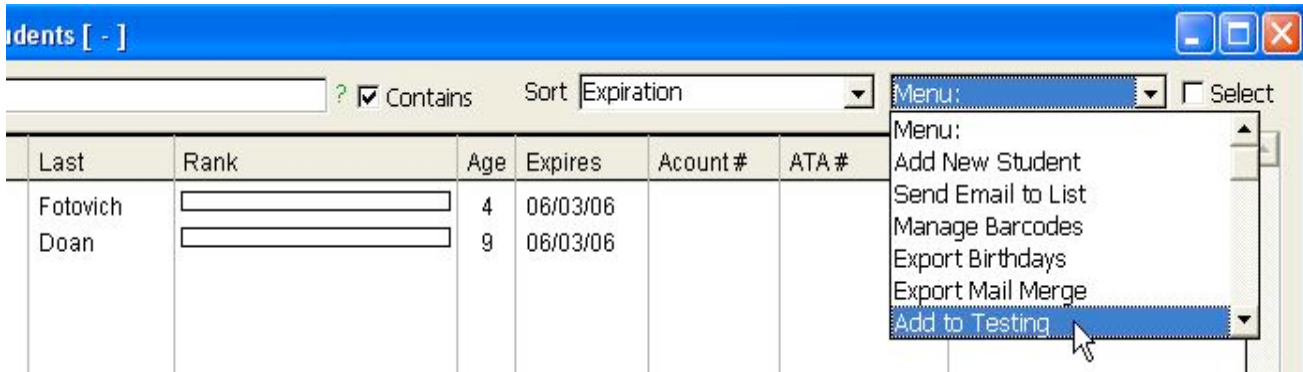
Underneath this box, School Manager Pro will tell you what rank of judges you need to attend this testing based on the ranks of students who will be testing. Obviously, at this point, we have not yet entered any students, so the information would be inaccurate until you have entered the students. Once you have done this, you can reference back to this “info” tab to make sure you have enough of the proper rank judges.

Judges Needed: Two 3rd Degrees

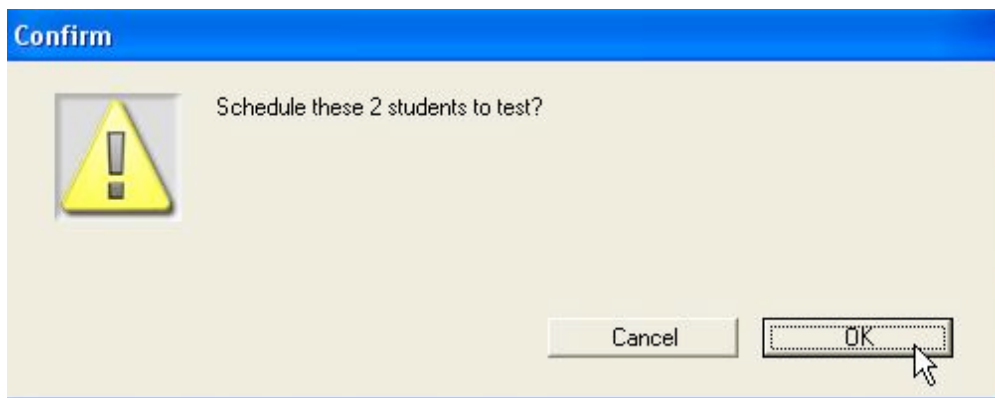
Repeat the above steps for each group testing at different times, i.e. Tigers, Color Belts, Black Belts, etc.

Next schedule your students to test. There are several ways to do this, but the fastest and easiest way is thru your student menu. Go to the “File” menu and select students. If you are creating multiple testing times for students, type a key word in the “Find” box on the upper left corner (example: “tigers” if this is a Tiger testing, Adults, BBC, etc.) Depending on your settings, you may need to push the “Tab” key on your keyboard. You should now have a list of all students in the category you entered. On the upper right hand corner of you student list window is a box with the word “select” next to it. Click this box. Some buttons will now be visible across the top of the window. It is very important that you click the button labeled “Uncheck All Students.” If you do not do this, students who have been checked in the past, even ones who are not on this screen, will be added to your testing. You now have two options based on the number of students in this group who will be testing. If you just have a few, click the box on the far right side of the screen on the same line as their names. If most of them are testing, click the “Check These Students” button, near the top center of the screen. This will automatically select everyone who is listed. You can then go through and uncheck the ones who will not be testing.

Then click on the “Menu” arrow on the upper right of the window and select “Add to Testing”.



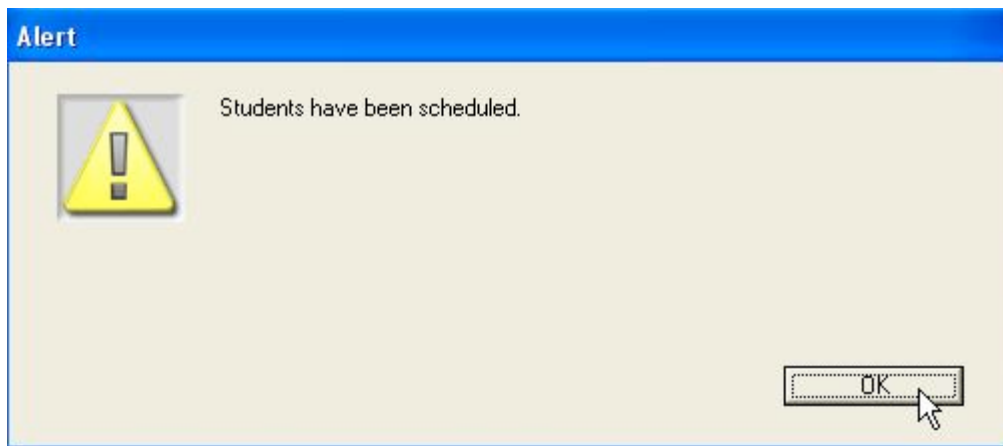
A window will ask you to confirm that you want to add these listed students to a testing. Click “OK”.



Select the testing you want to add them to using the drop down arrow. Then press “OK”.



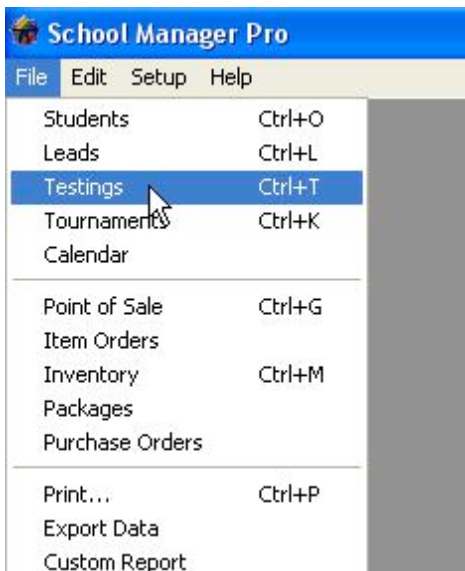
A pop window will let you know that you have scheduled these students to test. Click “OK”.



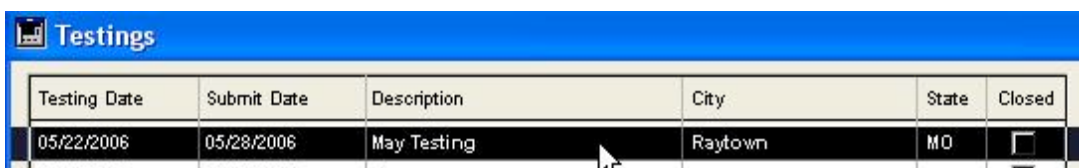
Editing your testing:

Please note that there will be a “Delete” button on almost all tabs. This button will delete a student from the testing. However, IT IS ALWAYS BEST TO DELETE A STUDENT FROM THE TESTING USING THE “FINANCIAL” TAB. This will delete them from all areas of the testing, no matter the status of the student. Depending on if the student has been invoiced or paid, needs to renew his ATA membership, etc; the student may not be delete from all sections of the testing if you use a different tab.

To add more students, delete students or change anything else about this testing, select “Testings” from the “File” menu.



Double click the testing you need to view or edit.



To add an additional student to the testing you can use the Add Student tab.



Simply type in the name of the student you wish to add and select them from the list by double clicking their name. This will add them to your testing.

Info | Add Students | New Members | Renewal | Testing | Mid

Find Student   Contains

Double-click to add a student to this testing

| ATA        | First    | Last    | Rank |
|------------|----------|---------|------|
| 1054-24388 | D'Angelo | Daniels | III  |
| 6964-35499 | Raleigha | Daniels | II   |
| 5673-31089 | Aaliyah  | Daniels | II   |
| 2410-17016 | Aaron    | Daniels | I    |
| 875-31693  | Andrew   | Daniels |      |

The “New Members” tab contains all testing students that do not have an ATA number entered.

Info | Add Students | New Members | Renewal | Testing | Mid Term | Financial

New Members: 2

| ATA_Number | First   | Last     | Old Rank | New Rank | ATA: New                            |
|------------|---------|----------|----------|----------|-------------------------------------|
|            | Luke    | Doan     |          | II       | <input checked="" type="checkbox"/> |
|            | Lindsey | Fotovich |          | II       | <input checked="" type="checkbox"/> |

The “Renewal” tab lists testing students whose ATA membership has expired or will expire before the number of days you have entered into the “ATA Advance Renew” field on the Setup menu. This will enable you to collect their ATA membership dues with their testing fees, rather than them getting a letter from headquarters to renew. The field called “renew” will default to “1”. This is the number of years for the renewal. If a student will be doing a five year renewal, change this number to a “5”. And if this student is actually not going to renew, change the number to a “0”. (Note: When you enter a zero, the field will go blank and the student will still be on this list until you change screens. If you want to double check that it is correct, click on another tab and then back to the “Renewal” tab. The student should no longer be listed.) The “New Exp.” field will show a date of “00/00/00”. Leave this blank until you get your testing results back from Headquarters. You can then put in these dates.

Info | Add Students | New Members | Renewal | Testing | Mid Term | Financial

Renewals: 1

| ATA_Number | First | Last    | Old Rank | ATA: New Renew                      | New Exp. |
|------------|-------|---------|----------|-------------------------------------|----------|
| 2410-17016 | Aaron | Daniels | II       | <input checked="" type="checkbox"/> | 00/00/00 |

The “Testing” tab will show you a list of all the students that are testing in the selected testing. If you want to see everyone that is testing for this “Submit Date”, in other words, all students from any category, go to the “Display” box in the upper left corner and select “All.” Most information on this screen is also displayed and more easily dealt with on other screens. This is mostly for “overview” purposes. However, there are a few exceptions. One is the “transfer” field. If this student has transferred from another ATA School and has not yet tested at your school, check this box. Also on

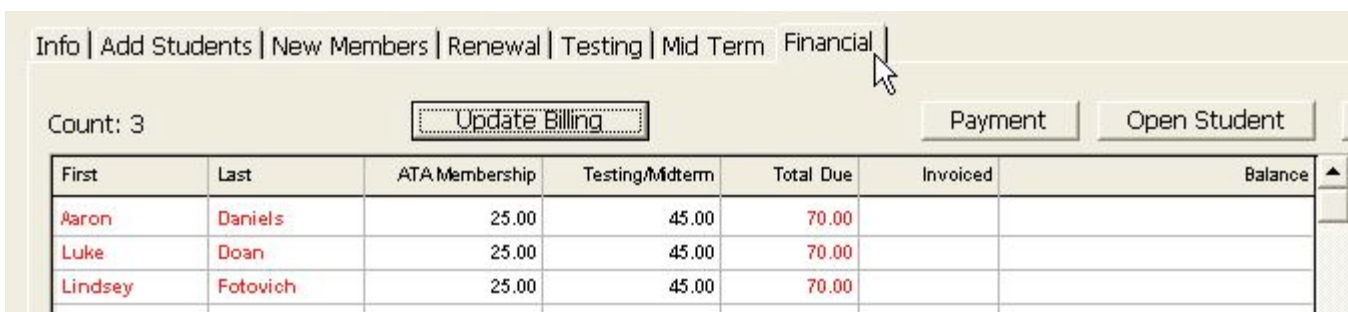
this screen is the “Prev NC” field. If the student had a previous no change for this rank, SMP will automatically check this box. The only time you should manually enter anything into the “Tested” field, is if a student does a pre-testing, or has tested with another group so they are still part of this testing, but will not need to appear on the judging sheets. You may delete a student from the testing on this screen by clicking on the student’s name and then clicking the “Delete” button in the upper right corner; however, it is usually better to delete them from the “Financial” tab. You can also open a student’s record by clicking on the student’s name and then clicking the “Open Student” tab in the upper right corner. If the student is marked to do a testing, but actually needs to do a mid-term, simply click the “mid-term” box on the line with their name. This will move them to the “mid term” tab.

The next tab is the “Mid Term” tab.

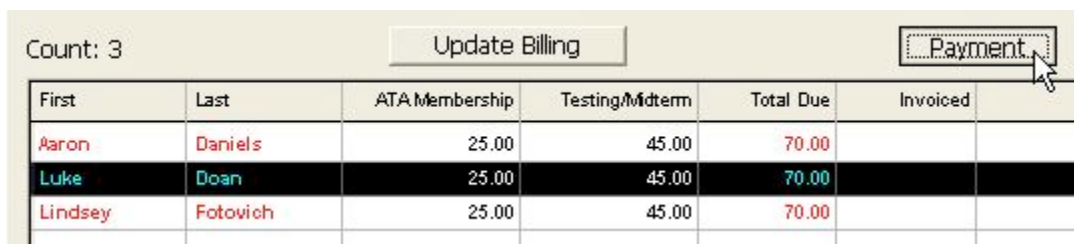


You can change the status of their testing from Midterm to Rank testing by checking the Test box. The next time you open this tab, the student will no longer appear. You can also review the student’s testing/midterm history by clicking on the student’s name, click on “Open Student” and then go to the “Testing” tab.

The “Financial” tab will display a list of all students and their financial information for this testing. This is also the ideal place to receive payments for testing. (As we get close to testing, I just leave this screen open at my school so that anyone at the front counter can accept a payment quickly.)



Select the student who will be paying and press the “Payment” button.



Notice that the resulting window shows all testing family members and the total for all of them. You have two options for payments. If you have a student who will only be making a partial payment or who will also be purchasing or paying for something else in addition to the testing, click the “Invoice” button.

| First   | Last     | ATA Membership | Testing/Midterm | Total Due | Invoiced | Balance      |
|---------|----------|----------------|-----------------|-----------|----------|--------------|
| Luke    | Doan     | 25.00          | 45.00           | 70.00     | 70.00    | Billed 40.00 |
| Lindsey | Fotovich | 25.00          | 45.00           | 70.00     | 70.00    | Billed 40.00 |
|         |          |                |                 |           |          |              |
|         |          |                |                 |           |          |              |
|         |          |                |                 |           |          |              |
|         |          |                |                 |           |          |              |

140.00    0.00

This will create and display an invoice that you can add other things to or put in notes. You would then receive the payment as you would normally from the “Student Record”. A permanent record of this payment and order will be in the student record.

**Sale: Luke Doan 1450**

Date:   Complete    Discount:  %

**Luke Doan**

Items | Payments |

| Code | Description           |                  | Order                    | Coming                   | Arrived                  | Qty | Price | Extend | Tax                      |
|------|-----------------------|------------------|--------------------------|--------------------------|--------------------------|-----|-------|--------|--------------------------|
|      | Testing Fee 5/22/2006 | Lindsey Fotovich | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1   | 70.00 | 70.00  | <input type="checkbox"/> |
|      | Testing Fee 5/22/2006 | Luke Doan        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1   | 70.00 | 70.00  | <input type="checkbox"/> |
|      |                       |                  |                          |                          |                          |     |       |        |                          |
|      |                       |                  |                          |                          |                          |     |       |        |                          |
|      |                       |                  |                          |                          |                          |     |       |        |                          |
|      |                       |                  |                          |                          |                          |     |       |        |                          |

Notes (print on receipt)

Non-Printing Notes  426

Subtotal 140.00

6.975% Tax 0.00

**Total \$140.00**

Payments 100.00

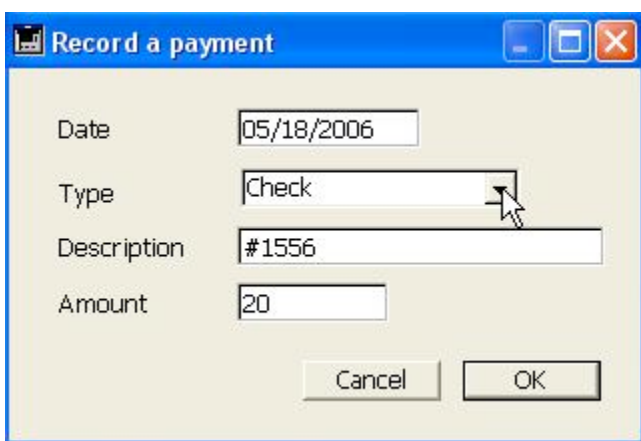
**Balance Due \$40.00**

Usually you will just be receiving a payment for the actual cost of testing. If this is the case, press the “Receive Payment” button.

| First   | Last     | ATA Membership | Testing/Midterm | Total Due | Invoiced |
|---------|----------|----------------|-----------------|-----------|----------|
| Luke    | Doan     | 25.00          | 45.00           | 70.00     |          |
| Lindsey | Fotovich | 25.00          | 45.00           | 70.00     |          |
|         |          |                |                 |           |          |
|         |          |                |                 |           |          |
|         |          |                |                 |           |          |
|         |          |                |                 |           |          |

Receive Payment Invoice 140.00 0.00

This will bring up the payment method window. Enter the information requested and click “OK”.



Record a payment

Date: 05/18/2006

Type: Check

Description: #1556

Amount: 20

Cancel OK

The “Financial” tab is the best place to delete a student from the testing. First, make sure they haven’t paid for or been invoiced for testing. This is easy to do. Just check the column called “Total Due”. If the number in this field is black, the student has either paid or been invoiced for this testing. If they have been invoiced, there will be a red number in the “Balance” column; you can delete the invoice from their “Student Record”. To delete the student from the testing, click on that student’s name and press the delete button found on the top right of the page.



You will almost never need the “Menu” drop down box in the upper right hand corner until after testing. We will cover this box in that section. The only things you MAY want to do is “Delete Testing” or “Create Invoices”. The only time that you might want to delete a testing is if you realize that it has been set up completely wrong and it would be easier to start over from the beginning. If you decide to start over from the beginning, make sure to delete this one first or else, students will be listed twice. The other option is “Create Invoices”. Only do this if you are sure that everyone on this

list WILL be testing. Once they are invoiced, the invoice remains in their record, even if you delete the student from the testing.

## Preparing for Testing

Once your testing is set up, you will want to print several things for testing. Anything to be printed will begin with the following steps:

Select “Testings” from the “File” menu. Then double-click the testing you need. Note: if you want to print a belt order for all of this week’s testings, you can select any one of these testings and be able to create an order for all.

Then go back to the “File” menu and select “Print”. A window will open showing all the printing options. Select the one you want and click on the “Print” button on the bottom of this window.

### Judging Sheets:

The window you will see has a field called “Testings to Print” this will list all the testings that are associated with this testing. Any group that you do not want on this testing should be removed by clicking on its name and dragging it to the field on the right called “Testings to exclude”. This will give you the ability to print judging sheets for the Tigers tonight and a different judging sheet for the kids tomorrow.

You can then choose the order you want the students to appear on the judging sheet by using the “Sort” drop down box. The first option is by “Name”. This will put the students in alphabetical order. The second option is by rank. This will list the students by order of rank, starting with the lowest rank first. The third option by “Block/Age” is perhaps the most useful. This will list the students using the blocks that you have set up, using “Block 1” first and continuing. Within each block, it will also sort the students by age. This is really convenient because it eliminates the scenario of going down the list trying to find the right size kid to do one-steps with little Joey. Here’s an example: If you have White-Yellow belts as one block, a 5 year old white belt would be followed by a 5 year old yellow belt, a 6 year old white belt and a 6 year old yellow belt. Later on the list would be your adults. So when you call up the students in the order listed on the judging sheet they are almost always with someone their own size. Next is “Program/Block/Age” and last is “Block/Program/Age”. Both of these will sort by the first word listed, then the second and last by age.

You can now choose to print pictures. This is nice for guest judges or even any judge who doesn’t teach this group very often. They can always identify the student. This makes the guests look good at the end of testing because if they want to say something to an individual student, they can pick him out of the crowd. Choosing “Print Pictures” will also print on the judging sheets if the student has not yet paid for testing.

The last thing to choose is who you want to include from this group. The primary purpose of this option is to print judging sheets that don’t include people who may have already tested for some reason.

After making your selections, click the “Print” button.

Cover Sheet – This is the sheet that you will need to print if you are going to mail or fax your testing results to headquarters.

Testing Results and Mid Term Results – You won't print this until after testing. It will print out the results from all of the testings with the same "Submit Date". These will be done in order of rank.

ATA Memberships – This will print out the ATA membership forms.

Financial Report – This is another form that you won't need until after testing. It will break down all the money that you will need to pay headquarters with this testing. This uses the same form that headquarters uses for mailing or faxing results.

Belt Order Summary – This will give you a list of the belts that are needed for this testing in a way that is easy to use to order these belts.

Belt Order Details – This is a list of each belt and who it belongs to.

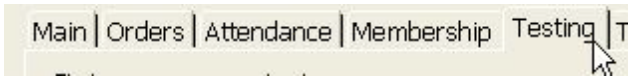
Belt Labels – This will print out labels that you can put on each belt, showing the name of the student, the rank, and size of the belt.

## After Testing

Open this testing by selecting “Testings” from the “File” menu and double clicking on the current testing.

The first step to easily posting the new Ranks, ATA Numbers and expiration dates and Midterm results is to combine the testings. Go to the “Menu” box in the upper right corner. Select “Combine Testings”. This will produce a window with all testings with the same “Submit Date” in the white space on the left. If for any reason you do not want to include one of these testings, drag it to the “Testings NOT Changed” field on the right. Name the combined testing in the “Description” field. Then click “Combine”. Now you are ready to update your information.

Go to the “Testing” tab to view the default ranks.

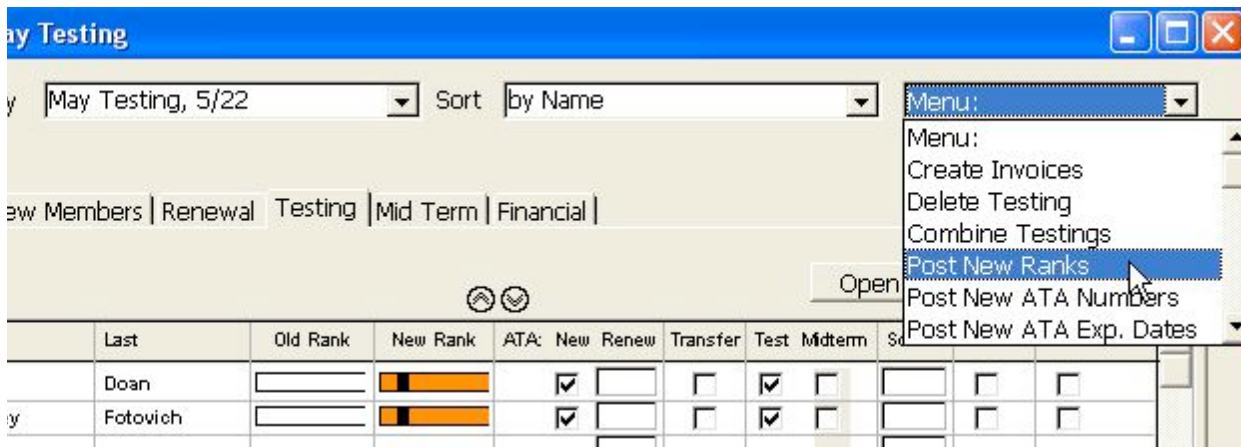


Check to make sure that everyone’s actual testing results match the default ranks. If a student had a no change or was promoted more than normal, click on that student’s name. Then press the Up or Down key to change the rank they will be receiving.



Also, make sure that the mid term scores have been entered for each student by clicking on the “mid term” tab and entering the score in the box.

To post the new ranks to the Student Records, go to the “Menu” box in the upper right corner. Then press the drop down arrow. Select “Post New Ranks”.



Once you have your results from headquarters, you can enter the ATA numbers for new students. The easiest way to do this is to go to the “New Members Tab”.

| ATA_Number | First   | Last     | Old Rank | New Rank | ATA: New                            |
|------------|---------|----------|----------|----------|-------------------------------------|
|            | Luke    | Doan     |          |          | <input checked="" type="checkbox"/> |
|            | Lindsey | Fotovich |          |          | <input checked="" type="checkbox"/> |

Type in each student’s ATA number.

| ATA_Number | First   |
|------------|---------|
| 0605-23758 | Luke    |
| 0605-      | Lindsey |

Then go to the “Menu” box in the upper right corner. Then press the drop down arrow. Select “Post New ATA Numbers”. You will be asked to enter a “Default Expiration Date.” Since the students all got their ATA numbers at the same time, it should be the same date for all. Simply enter the expiration date you received from Headquarters.

You can also enter all of the new ATA expiration dates by going to the “Renewal” tab.

| ATA_Number | First | Last    | Old Rank | ATA: New Renew             | New Exp. |
|------------|-------|---------|----------|----------------------------|----------|
| 2410-17016 | Aaron | Daniels |          | <input type="checkbox"/> 1 | 00/00/00 |

Enter the new expiration date for each student's ATA membership.

| First | Last    | Old Rank   | ATA: New Renew             | New Exp. | Transfe                  |
|-------|---------|------------|----------------------------|----------|--------------------------|
| Aaron | Daniels | ██████████ | <input type="checkbox"/> 1 | 06/01/07 | <input type="checkbox"/> |
|       |         |            |                            |          |                          |

To post the new dates to the Student Records, go to the "Menu" box in the upper right corner. Then press the drop down arrow. If you have a lot of students with the same expiration date, you can leave them blank for now. Select "Post New ATA Exp. Dates".

You will be asked to enter a "Default Expiration Date." This date will be put in as the expiration date for any students who do not already have something entered into the "New Exp." field. If you have already entered a date for a student, SMP will enter the date that you manually entered instead of the default date into the student record.

The Testing is now complete and can be "closed". This is done by going to the "Info" tab and clicking the box labeled "Closed" next to the "Testing Date" at the top.



## Inventory and purchase orders

Under the “file” menu is a group of options related to the point of sale feature. These are Point of sale, Item Orders, Inventory, Packages and Purchase Orders. This section of the manual will cover the use of these features.

The first is Point of Sale. Selecting this will give you a list of any sales that are not complete for some reason; usually they have a balance due. The main thing to do from this is to print invoices and reports on your sales. Once you have opened Point of Sale, select print from the “File” menu. You will be given a list of things to print:

These invoices – selecting this will print an invoice for each of the open sales showing in the Point of Sale window.

Receipts reports – This will enable you to see your totals for a certain period of time. When you chose this, a window will open that will ask you the start and end date you want to see. So you could type in today’s date for both to see what was brought in today, or any other time period.

Statements and Statement Summary – These are very similar. The only difference is that the Statements option will print individual statements and Statement Summary will combine all statements for the student or family. You will be asked if you want to print statements for inactive students, then you will be asked if you want to print a combined statement for the family.

## ITEM ORDERS

This is under the “file” menu. Clicking on it will open a window showing the status of each item that has been ordered.

The first things it will list are the items to be ordered. You can export these to email or fax by choosing “need to order” from the first drop down box at the bottom of the screen. This will only show what you need to order. You can then click the “export” button. You will be asked to name it and choose a location to save it to. The default is the school manager pro file. It is usually easier to find if you save it to the desktop. Once you have done this, you will be asked if you want these items marked as coming. The assumption is that you are ordering them now so you would usually choose “okay”.

When you get your box from WMA (or whoever your vendor is) you can open this window again and go down the list marking each item as “arrived” as you make sure it is in the box. You can also double click on the student; this will take you to the invoice for that order. We usually print this and put it with the item(s) so that we know who gets what and that everything has been paid for. When the student picks up these items, uncheck the “arrived” box. This can be done either through this window or in the students order.

## INVENTORY

Most of the items offered by WMA are listed with the WMA part number, cost, what we sell it for at our school, picture of the item and what we sell it for at our school. Newer items may not be listed. Many Century items are also listed. You can edit any of these fields by double clicking on the item. On the right side of the Inventory list is a column called “goal” and one called “count”. You can set the goal for each item to be how many of these you want to have in stock. Count is for the actual

number you have on hand. These numbers will be used to generate purchase orders. These will be covered later in this section.

Adding new items. You can do this using the drop down menu on the right side of the screen. When you choose this option a new item box will open. After you have filled in these boxes, you can either chose save or duplicate. If you are adding something that comes in multiple sizes, you can chose duplicate and just change the sizes on the created records. You will need to be logged in as the school owner in order to put in your cost.

The last item on this drop down menu is “Reset inventory.” If you chose this, all inventories will be set to zero.

You can also print several things related to inventory:

Barcode labels – You will only need this when you first get started. You can print future barcode labels when you receive purchase orders. Open the inventory list from the “File” menu. Check to make sure that the inventory is correct. Then select “print” from the “File” menu. Choose barcode labels from the resulting window. When you click on the “print” button, you will be told how many pages of labels you will need. These are formatted for Avery 5160 labels.

Inventory report – This will give a list of what you have in stock.

Price list – This will give you a list of items and their prices.

Catalog – Use this to make a catalog of the items you sell. This will include the price you charge and a picture of the items.

Item sales report – This will give you a list of what you have sold, who bought it, the cost, the sales price and the markup.

## PURCHASE ORDERS

To create a purchase order, open “inventory” from the file menu. The resulting window has a drop down box on the upper right corner. Use this to select “generate purchase order.” Then add any other items you need by clicking the “+” sign and typing them in. This can be used to put in the “need to be ordered” items from the “item orders” field. Edit quantities of existing items by changing the number in the order field. Once you have the order the way you want it, you can print it and fax to your vendor. Once you have placed the order, click the “ordered” box. This will fill in the date you placed the order.

To receive an order, open “purchase orders” from the file menu. Select the this order and click the “receive” tab. Go down the list entering the quantities of each item that you have received. Once you have finished, click the “receive” button. You will then be asked if you want to print barcodes. After you have done this and all items have been received, click closed.

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## Installing Upgrades

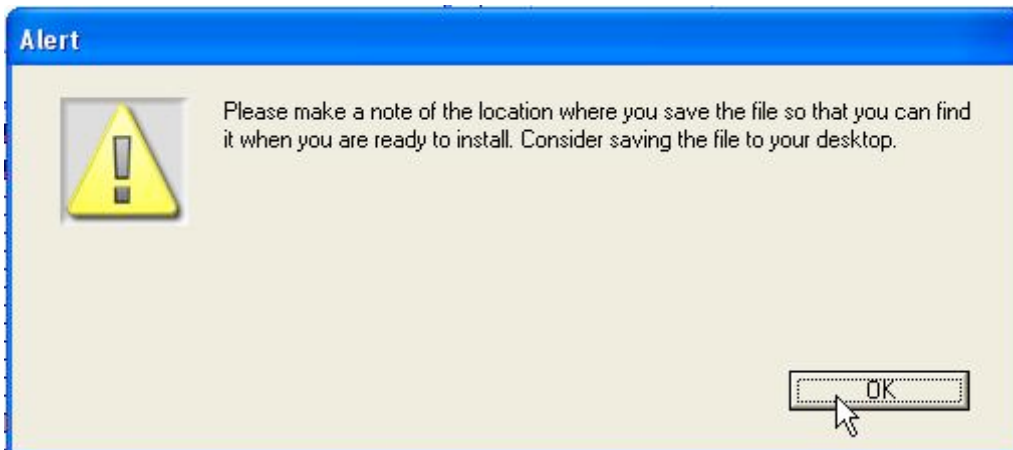
If you have Internet access , you will see the following window whenever an upgrade is available.



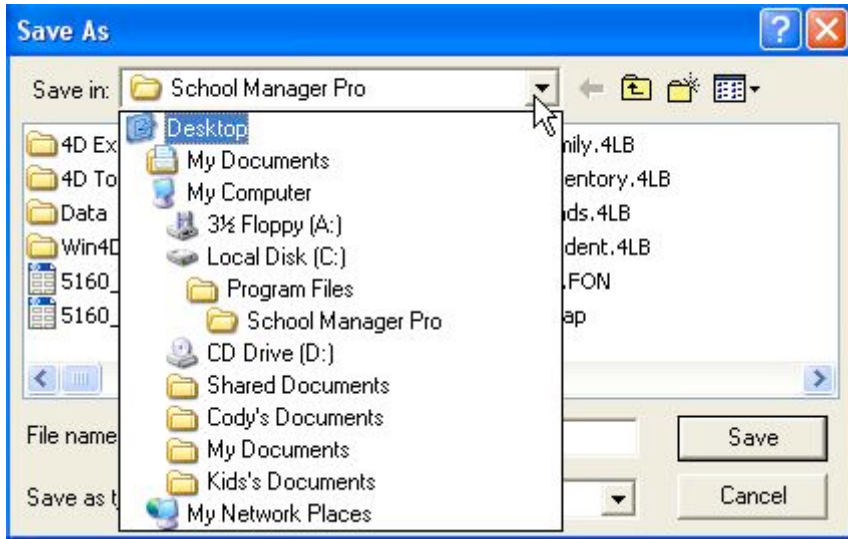
To see what is different about this upgrade you can click on the blue link “What’s New in This Upgrade?”

When you are ready to download the upgrade, we strongly recommend that you backup your SMP data. (This process is covered the “setup” section of this manual.) After doing this, click on “Download” to get the latest version of School Manager Pro.

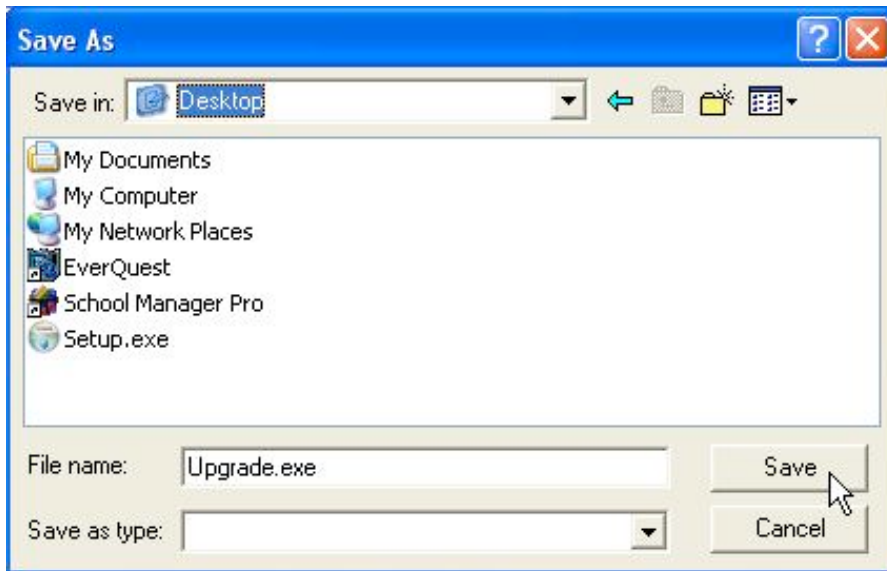
You will be prompted to make a note of where you save the file. We recommend that you save the download to your desktop.



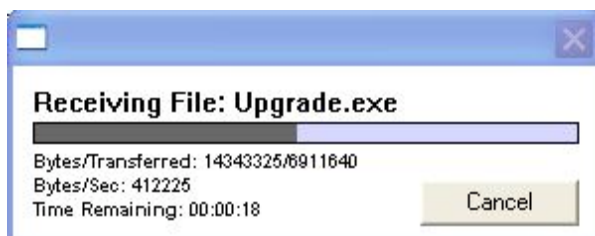
Change the file location to Desktop.



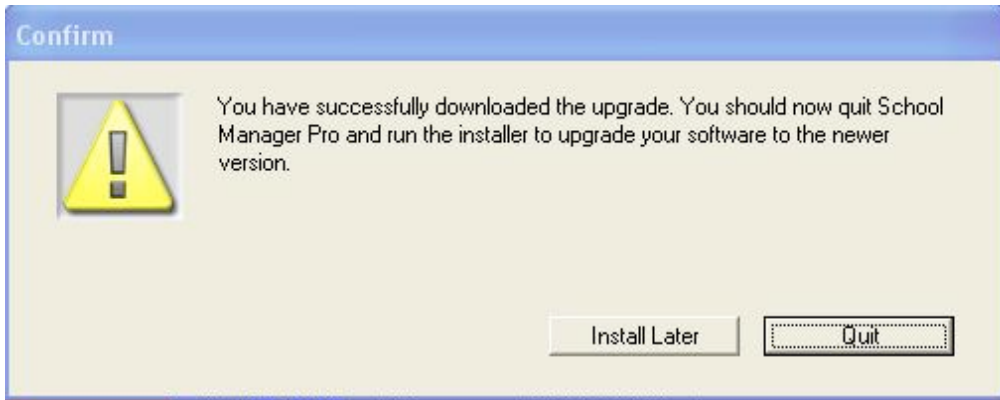
Click Save.



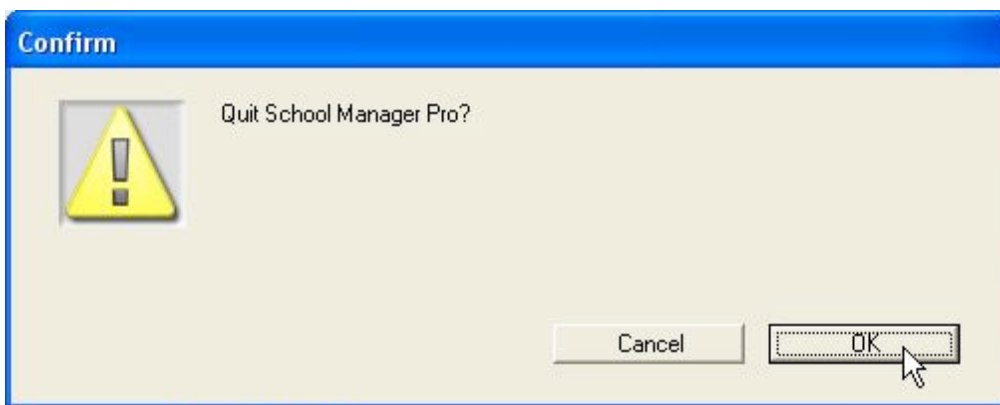
Wait for the computer to receive the file. Once the bar has reached the end, give it another minute or so to insure that the entire thing has been downloaded.



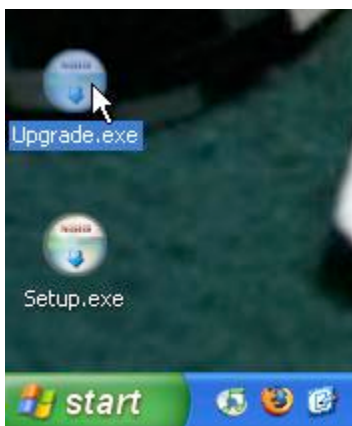
You will now be prompted to quit the program to install the upgrade.



Confirm that you want to quit the program to install the upgrade.



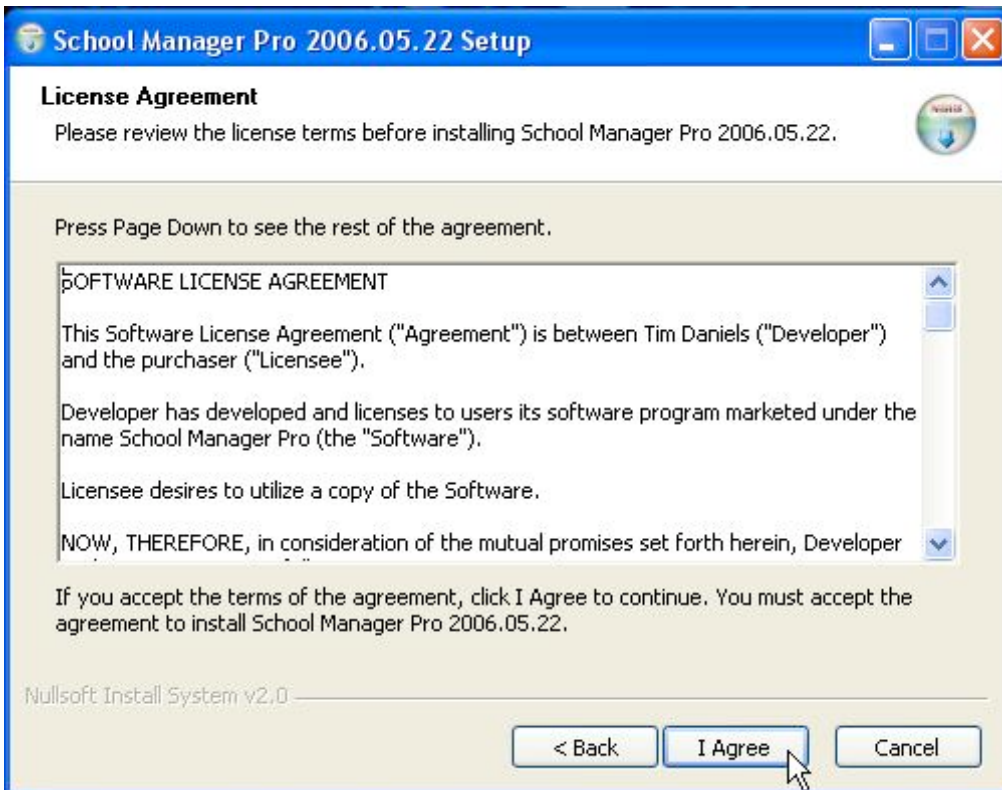
You will find the Upgrade.exe icon on your desktop.



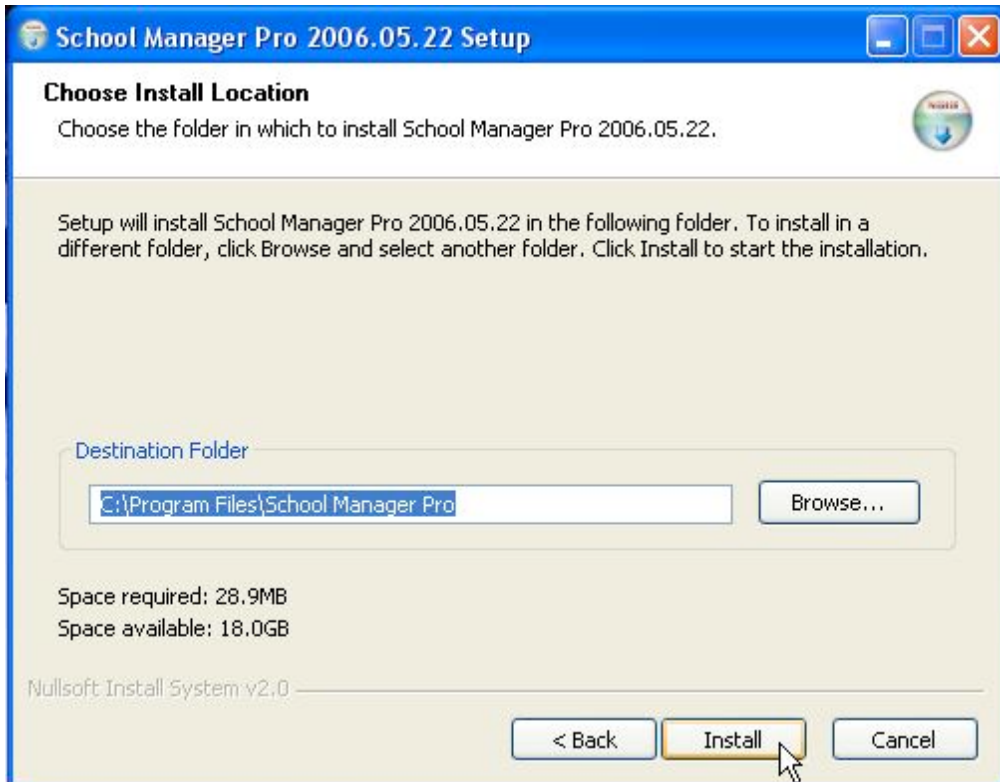
The set up wizard will pop up. Simply follow the steps.



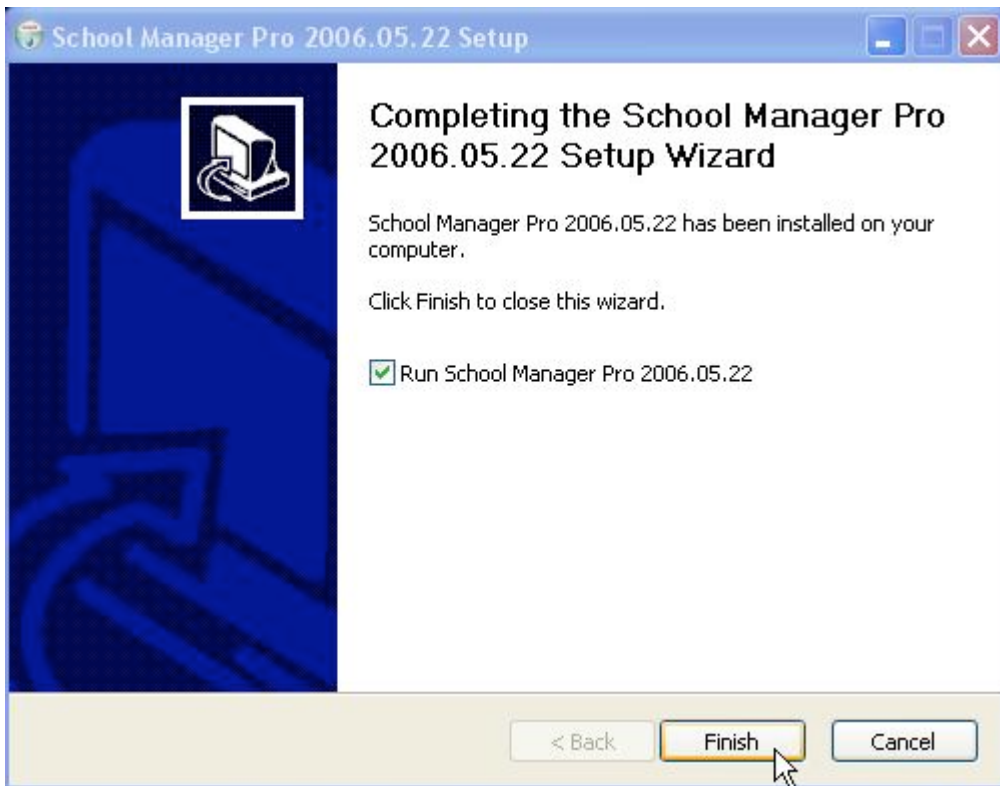
Select "I Agree"



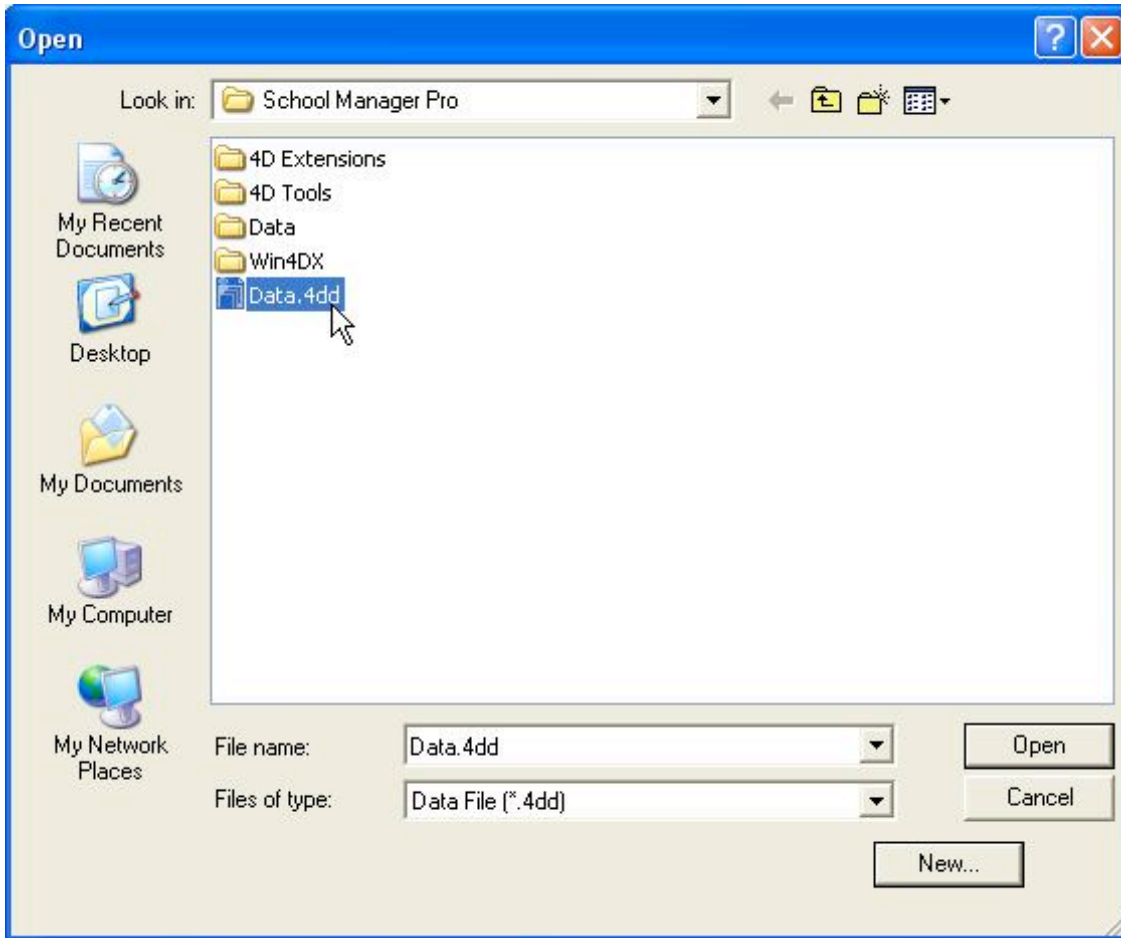
On the next set up screen, DO NOT change the Destination Folder. Press Install.



Press Finish.



Select the Data.4dd file.



Now you will be prompted to login again.

This completes the Upgrade install.



---

## Backup/Restore Data

This option is under the “Setup” menu.

**Backup** – Select Backup Data to make a backup copy of your entire data file as it is at that particular moment.

**Full** – Click “Full” to create a backup of your entire SMP data structure.

**Partial** – Click “Partial” to back up only selected data. You will almost never need to do a partial backup. This feature is available for certain unlikely scenarios in which the Developer may wish to have you back up only part of your data.

Click “Use Default” to have SMP automatically name the backup file for you (as shown next to “Default name:”), and save that file in the default location on your computer [(in the SMP program directory)]

Click “Let Me Choose” to specify your own file name and location where it will be saved.

If you selected “Partial” as your backup operation, SMP will then display a series of confirmation boxes asking you if you want to back up that particular area of data. On each window, select “OK” to include that data in your backup, or select “Cancel” to exclude that data from your backup. When all confirmation boxes have been displayed and you have made your selection in each, SMP will create a customized backup file with only the data you have.

**Restore** – Select Restore Data to restore your data file from a previous backup. – NOTE: Restoring from a previous data file will completely replace all current data in SMP with the data from the backup file. Therefore:

It is recommended that you first make a backup of your current data, either making a note of the unique default name given to that file (if you select “Use Default” in the backup process) or naming the file with a unique and identifiable name that will tell you which backup it is (if you select “Let me choose” in the backup process).

When performing the Restore Data command, make sure to select the correct data file to restore from. Be very sure this is what you want to do before executing the command, as it CANNOT be reversed.

If you’re sure, you will need to type the word “restore” in the box when prompted, insuring that this action is never executed accidentally.

If you have the Internet Backup option selected in your Preferences, SMP will create an internet backup of your current data before restoring from the backup you have selected. Once the internet backup is complete, SMP will display a window allowing you to browse to your desired backup file from which you wish to restore your data.

## FAQ

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Q. I don't see any of the students who are inactive, is their information gone?

A. In order to see inactive students, type a + sign before the student's name in the find box. Make sure you don't put a space between the plus sign and the name. Example: +joe. You can do the same thing in the "find" box in the lead section to find cold or joined leads.

Q. When entering data and you have to click several students down the column (i.e.: when running a testing to mark them as "tested")- is there a way to automatically click on all of them (or have them show up as automatically clicked)?

A. To check a batch of students all at one time, click the "select" button at the top of the window, click then click the "Uncheck all Students" button that you will see in the new row of buttons that appears above the student names. Now click "Check these Students". When we set up a testing, we do a quick search to bring up the students that are most likely to test, then check them all, uncheck manually any we know are not ready, then schedule them to test.

Q. Bar code scanning. I can't seem to get the scanner to work correctly.

When I scan a barcode, SMP doesn't recognize it as the student's barcode, though I had it generate the barcodes and printed a page to use as a test. Ideas?

A. Does your barcode scanner beep when you scan a card? If you have a serial scanner (plugged in to a com port with a 9-pin connector), just check the serial scanner box and tell SMP which COM port it is plugged in to on the "Attendance" tab. This can be found under the "Setup" menu, then "Preferences."

Q. The scroll bars disappeared on the student window as well as the ability to have selection boxes. Any idea on how to resize the window to be able to see that?

A. To fix your student window and get your scroll bars, etc. back you will need to hold down control-period on your keyboard which will close the student window. Then, hold down the shift key on your keyboard while opening Students from the file menu. This triggers resetting the window to default size and location and that should fix it. Also, you don't want to "maximize" the window as that can cause this kind of resizing issue.

Q. Some of my students' belt picture doesn't show. When I use the drop down box in those student records to select a belt they are all blank.

A. They are probably tigers and you have the "different tiger belts" checkbox marked in preferences. This can be changed by choosing "Preferences" from the "Setup" menu. Then select the "Other" tab. Uncheck the "different tiger belts" box.

Q. I am using a Mac and when I try to log out of SMP, I get a message that says, "File not found". What should I do?

A. There is a bug in the Mac version. You need to right-click on the program icon (the program itself, not the icon in the dock) then select "show package contents" from the menu that pops up. This will open a folder. From there, open the "Contents" folder, then "MacOSClassic". From the File menu, create a new folder there and rename it "Preferences". This should fix the problem.

Q. A tiger was accidentally scheduled for the kids testing. How can I move a student from one testing to another?

A. To move the student from one testing to another: Go to the "testing" tab and double click that student's name. It will open a window with a lot of information about this student and this testing. At the upper left corner is a drop down arrow next to the testing the student is currently scheduled to test in. Use the arrow to select the correct testing for this student.

Q. We have a new computer and I had to install SMP from the original disk. Do I need a new license code?

A. No, just make sure that you follow the section of this manual about exiting the demo mode; make sure that all the ranks are still listed after exiting demo mode. Then follow the directions explaining how to reinstall from a backup. Your license code is in your data and does not need to be changed.

Q. We cannot find a student on the testing. SMP says, "already imported to testing" but he is not showing up on either list.

A. Check the "financial" tab and delete the student from here. If the student was previously on the testing, paid or was billed for it, then deleted on the "testing" tab. They will still be listed as having paid for the testing on the financial tab. They will need to be deleted from the "financial" tab. Also, if you created a testing with the same dates and then created a second one without deleting the first one, SMP assumes you plan to combine these testings in the future and so believes that the student is already scheduled to test. Make sure you delete the testing that you are not using.

Q. When using a purchase order, we entered the items in as "received" but they are not showing up in inventory. What should we do?

A. After entering all the items into the "received" column, you need to click the "receive" button just above the list. You will then be asked if you want to print labels. After you answer this question, inventory will be updated.

Q. Is it possible to pull a report of all merchandise we have in stock? This way I can go back and audit our inventory as well as generating a report for my accountant at years end.

A. If you pull up your inventory list and then select "print" from the file menu, one of the choices is "Inventory Report". I believe this is what you are looking for. We give this report to our accountant.

Q. Is it possible to print mailing labels with family names on it instead of students? This way if I have a family of 5 they will only get one label for the whole family.

A. When you print mailing labels for your students, it will first ask if you want one label per student or one per family. If you choose family, it will print labels addressed to the family instead of the student, and will only print one label per family.

Q. We have a family of three and the system isn't giving them their 3rd person discount for testings. I hit update billing in testings but it didn't work. I also looked at their family tag to make sure they all have the same number. Got any suggestions?

A. If the family number is the same for all three members then it "should" be giving them the third member discount for testing. Is it possible that one of them was doing a midterm? The discount only applies if they are all testing.

Another possibility is that the 3rd family member discount under the ATA tab on testings has the wrong amount. For instance, if that figure was set to the same amount as the testing fee then it would look like no discount is being given. The ATA tab can be found by going to the "setup" menu and selecting "Preferences".

Q. My scanner I bought from you is not working, and there is a communication error when I open the program. What is wrong?

A. The communication error is because the program is not finding the barcode scanner. Check under preferences and change the COM port for the scanner.

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