

Getting Started **With** **The Master's Organizer**

Thank you for trying The Master's Organizer demonstration program by Akada Software. This booklet will show you a few of the things that The Master's Organizer can do. You can get further information by looking in our Help files.

This is a full working version of The Master's Organizer with the exception that it will stop working 30 days after you first run the program.

It is easy to convert to The Master's Organizer, if you already are using an existing program. Join the hundreds of martial arts school owners who have made the switch to The Master's Organizer.

If you have any questions, please call us toll free 800-286-3471.

STARTING The Master's Organizer

To start The Master's Organizer, double-click on The Master's Organizer ICON.

When The Master's Organizer loads, it will display ADMIN as the username and AKADA as the password. Click on the OK button to begin using The Master's Organizer.

Once you have started The Master's Organizer, you will see the main menu screen. Take a moment to look at the screen and the menus.

Clicking once on a menu name at the top of the screen will display the list of choices for that menu. If you see a right facing triangle, that means that there is a sub-menu for that item, giving you additional choices if you click on that selection.

Click on the Account tab on the Main Screen to go to the first account. You can continue through this booklet to see an overview of The Master's Organizer program.

CLEARING DATA (to enter your own school information) –

The demonstration contains sample data, which will help you learn how the program works. We suggest that you work with the sample data for a few days to familiarize yourself with the program. You may then choose to clear this data and enter in your own school information.

If you choose not to enter your school information, please feel free to continue to add sample data of your own.

Once you enter in your own school information, your demonstration program can be converted to a full working program, without any loss of information, even if it is after your 30 day free trial.

The Clear Database Screen lets you delete information from your current database.

To begin the Clear Operation, please follow these directions:

- Select File from The Master's Organizer Main Menu
- Select Clear Database
- Click on Select All Tables
- Click on the "Clear Database" button
- Click on the "Main Menu" button to return to the Main Menu

THE MASTER'S ORGANIZER TUTORIAL

The Master's Organizer Tutorial will take you through the setup for your school. We will start with Setup System and then go through setting up staff, classes, accounts and students. Detailed information on how to setup your school can be found in the How Do I? Section of the manual.

Setup System

Choose Setup System from the Main Menu.

My School Enter your school information on the My School Info tab.

Enter your name as the Contact

Enter your e-mail address if you plan to send e-mail from The Master's Organizer

Enter a session name such as "2004-2005 School Year."

Enter notes that are printed on reports in The Master's Organizer.

- Statement Note - Account Statement
- Payment Note - Account Statement
- Confirmation Note - Account Confirmation
- Registration Note - Account Registration
- Receipt Note - Account Receipt
- Coupon Book Note - Account Coupon Book

Defaults The Defaults tab consists of four separate tabs, Account, School, Class and Student. Defaults can be preset to save time when entering your information.

Account Tab Enter the city, state, zip code and area code for the majority of your students

Also choose how you want telephone numbers to be formatted

Setup the account billing frequency table, this governs how tuition is multiplied and discounted for groups of accounts

School Tab Enter the registration amount for each student in the family

Enter the late charge method (percent or amount) and amount

Choose whether you want Balance Forward accounting or not

Choose whether you want to hide the number of accounts and students

Enter or edit entries in the Student Tuition Discount table

(each entry can specify the method (percent or amount) and the value)

Class Tab

Enter the most common values for class tuition; class length and class size

Choose whether you want The Master's Organizer to check for time and room conflicts when setting up classes

(this also applies to enrolling students in classes)

Setup the rooms that you will hold your classes in

You can update each student's current grade by clicking on the "Update Student Grade" button

Select the default class sort order by selecting on of the radio buttons

Student Tab

Setup entries in the Student Belts, Student School and Student Doctor tables. These are used on the student screen.

Tuition Choose the tuition calculation method that best fits the environment of your school. If you need to use more than one, select the one that fits the majority of your accounts since it is automatically set as the tuition calculation method for all new accounts. The tuition calculation method for a student is copied from their account record.

Class

Tuition is obtained from the class that the student is being enrolled in.

Table (Student)

Tuition is obtained from the Tuition Table, each student, in an account, starts at the beginning of the table. The first class tuition is in the field

<u>Table (Account)</u>	“Class 1”, the second class tuition is in the field “Class 2”, and so on. Tuition is obtained from the Tuition Table, the first student, in an account, starts at the beginning of the table and the next student starts where the first student ended.
<u>Time (Student)</u>	Tuition is obtained from the Tuition Time Table, by using the total class time that the student is enrolled in to find the correct table entry. The class tuition is the difference between the table’s tuition entry and the previous tuition total.
<u>Time (Account)</u>	Tuition is obtained from the Tuition Time Table, by using the total class time that all students in the account are enrolled in to find the correct table entry. The class tuition is the difference between the table’s tuition entry and the previous tuition total.
<u>Custom</u>	Tuition for each student and account is set manually on the student or account screen

Each student in an account can use a different tuition calculation method and individual class tuitions can be edited to meet any special circumstances.

Mail Codes Mail codes can be setup to group students or accounts together such as volunteers, student teachers, clubs etc. The mail codes can be used for printing mailing labels or envelopes, telephone lists or other reports and for entering charges to those groups.

Charge Codes Charge codes are used to enter charges on accounts. Pre-defined charge codes are setup for:

- Registration
- Tuition
- Late
- Belt
- Competition
- Uniform
- Miscellaneous

You can change the amounts and sales tax status for the pre-defined charges. You can also add additional charge codes as you need.

Sales tax can also be set on this page. Sales tax will be applied to a charge, after the charge has been entered.

Accounting Link The Masters Organizer can be linked to QuickBooks for income transfer. You should set up the control accounts to match the corresponding general ledger account numbers in QuickBooks. You’ll also need to set the path to the QuickBooks folder.

Color You can change the background color of The Master’s Organizer program to either a defined color or custom color.

Passwords You can edit or add usernames and passwords and define their access to The Master’s Organizer screens and features. Access to this tab is restricted to the ADMIN username.

Credit Card/

Printer This tab lets you setup information for the optional credit card processing and for the label and receipt printers.

Add Instructor

Start by selecting the Staff tab on the Main Menu.

Click on the "New Staff" button.

Enter the following information:

- Name
- Address
- Telephone Numbers

Once you have added the instructor you may fill in additional notes and qualifications.

The class tab on the instructor's screen will automatically fill with classes as you assign those classes to the instructor.

Add Setup

Next, select the Class tab from the Main Menu.

Click on the "New Class" button.

Enter the following information:

- Class Name
- Starting to Ending Rank
- Starting to Ending Age
- Room
- Day
- Start and End times (length of class will be automatically calculated)
- Tuition
- Maximum Number of Students
- Class Key (optional 5 character sort key)
- Class Description
- Instructor
- Assistants

Click on the "Add Class" button to add the class you just defined and repeat until all classes are defined.

The Master's Organizer verifies that each new class does not conflict with any other classes on the same day, in the same room and during the same time frame before adding the new class.

Note: If there is a conflict you can choose to add the new class anyway.

Add Account

Now, you will add your first account.

Select the Account tab.

Click on the "New Account" button.

Enter the account's First and Last Name, select the account type (active, inactive or prospect) and click on the "OK" button.

The Master's Organizer checks to see if that Account Name is already in the system.

If so you will be informed and required to change the new account name.

If it is not already in the system you will be taken to the Account Screen where you can enter

- the account address
- parents telephone numbers and place of employment
- emergency numbers

Now you can add students to the account by clicking on the "Add Student" button.

Add Student

Click on the "Add Student" button on the Account Screen.

Fill in Student's first and last names.

Click the radio button for either Male or Female.

Click on the OK button to add the student and return to the Account Screen.

Adding a student to an account will result in a Registration Charge being added to this account.

Click on the student's name to go to the Student Screen.

On the Student Screen you can fill in information regarding:

- | | |
|----------------|-----------------------|
| ➤ Birth date | ➤ Tuition Calculation |
| ➤ School | ➤ Medical Information |
| ➤ Grade | ➤ Notes |
| ➤ Year Started | ➤ Belt Level |
| ➤ Discount | ➤ Attendance |

Click on the Enroll Student button to bring up the Enroll Student in Class Window.

If you want this student to have a student discount, and you have not already specified this, click in the Student Discount box before you add them to their classes.

Point the mouse arrow to the left of the class, in the small gray box, and click to select. When a class is selected, the line defining the class will turn blue. If you want to choose more than one class, hold down the <Control> key and continue to select classes.

Click on the "OK" button to enroll the student in the selected classes.

You can also add a class by double clicking on the small gray box. The class will be added to the student class grid.

Click on the "Exit" button to return to the Student Screen. The classes will be listed by day and time in the Class Table.

The tuition defined for each class is copied back to the Student Screen.

If the Tuition is not correct, you can edit it on this screen. The change will affect this student only. To edit the Tuition Amount, click twice in the Tuition box of the Class Participation Table and type in the correct amount. Edited tuition amounts are displayed with an orange background. The student's total tuition will be recalculated immediately.

Continue the above procedure to enroll the student in the classes that they have selected.

Click on the "Go To Account" button to return to the Account screen or, click on the Main Menu button to return to the Main Menu screen.

Enter Charge for Tuition

Click on the "Tuition Charge" button on the Account Screen.

This displays the Input Charge window.

Fill in the following:

- Enter Date, if today's date is incorrect
- Enter Amount for partial month's tuition
- Click on the "OK" button to post the charge to the Account
- Click on the "Exit" button to return to the Account Screen

Now enter your payment for the registration and or tuition.

Enter Payment for Tuition

Click on the "Input Payment" button on the Account Screen.

This displays the Input payment window.

Fill in the following information:

- Payment Date
- Payment Type
- Check or Reference number
- Description
- Payment Amount
- Click on the "OK" button to post the payment to the Account

The Master's Organizer will open the Apply Payment to Open Charges window which displays the "open" (unpaid) charges for this account.

To apply the payment to a charge:

- Click on an Open Charge that you wish to pay with this payment.
- Click on the "Apply Payment" button.
- Continue until you have paid all Open Charges that you want to
- When the remaining balance amount is zero, click on the "Exit" button to close the Apply Payment to Open Charges

The Master's Organizer supports the following payment situations:

- Full payments
- Partial payments
- Multiple payments to a single charge
- A single payment closing multiple charges
- Overpayments (deposits)

To use the open balance on a later charge:

- From the Account Screen, Click on the "View Transactions" button
- Click on payment whose open balance that you want to use
- Click on the "Apply Payment" button at the bottom of the screen
- Click on an Open Charge that you wish to pay with this payment.
- Click on the "Apply Payment" button.
- Continue until you have paid all Open Charges that you want to
- When the remaining balance amount is zero, click on the "Exit" button to close the Apply Payment to Open Charges

You have now followed the basic steps to enter your classes and first account.