



## ClassSmart 2008 New Features

December 2007

DataMax is pleased to announce the release of ClassSmart 2008. All of the new capabilities in this upgrade are a direct result of feedback from the ClassSmart user community. Here is a summary of the new features found in this update.

### **Automated Credit Card Processing**

ClassSmart 2007 introduced credit card integration with X-Charge from CAM solutions ([www.x-charge.com](http://www.x-charge.com)) using the QuickAccount screen. ClassSmart 2008 expands this capability with the new add-in module **ClassCharge**. This powerful utility program pulls all customer accounts into one screen, including credit card information and account balances. You can then step through each account, verifying the data you have on file, or updating the information as required. ClassCharge creates a virtual stack of charges that you process from one easy to use screen, where as the Credit Card capability on the ClassSmart QuickAccount screen requires you to move to each account individually and swipe the customer's credit card or manually enter the card information each time you want to process a charge. ClassCharge employs a special "Super User" security level not available in ClassSmart to protect your information. ClassCharge automatically creates a payment record that you can see in QuickAccount. A batch credit card report is also available.

### **Expanded Email Capability**

ClassSmart 2006 introduced automation with MS Outlook 2003 to send emails directly from the Mailing Labels screen, the Registration screen and QuickAccount, including attachments. ClassSmart 2007 expanded this capability to the Birthdays screen. ClassSmart 2008 extends this power feature to the Parent Accounts Summary screen. A new sorting criteria for Parents who do not

have any students in class has also been added, so you can now send a broadcast email to all parents you have on file who are not currently in your program. The email screen has been given a “memory” so that it remembers your previous settings, such as “Read Receipt” and “Statement.” The individual email screen can be invoked from QuickAccount.

### **The SS Daily Lessons Report**

The SS Report, one of several Daily Lessons reports, has been modified to permit the printing of specific instructors by means of a dialog box similar to those used on the Registration screen.

### **QuickAccount Changes**

ClassSmart 2008 gives you the ability to open QuickAccount from the Enter History screen, the Parent Details screen, the Mailing Labels screen and the Transfer and Removal dialog box, with QuickAccount pre-loaded to the parent shown on those screens. Two combo boxes have been added to the QuickAccount screen itself, so that you can search for a customer account by Parent Last Name (as with other versions of ClassSmart), Student Last Name (new for ClassSmart 2008) and Student First Name (also new).

### **Data Entry Updates**

A second email field has been added to the Enter History screen. Account balances are now shown on the Mailing Labels screen.

### **Attendance Recording**

Attendance can be recorded using the ClassCard add-in module or directly from the Registration screen. These attendance records can be used to bill customers for lessons taken during a specified time period. ClassSmart 2008 simplifies the attendance recording process by allowing you to check-in all students in a specified class at once, rather than selecting each student individually and clicking the ‘record’ button on the Record Attendance dialog box.

### **Take a Holiday**

ClassSmart expands the use of the Holidays list to Lesson Billing. You can individually enable or disable each holiday in your list and use this for ProRate calculations (Session Billing via the QuickBill screen on the Registration screen) and for determining the number of lessons between a specified time period for Lesson Billing.

### **Using the User**

The “user” information, meaning the person logged onto ClassSmart, is now carried to History files, the Registration screen and on all four tabs of QuickAccount.

### **Graphing the User**

A new graph has been added to the ClassGraph add-in module, showing Salesperson as a function of regular class enrollments for active classes. You can use this information to identify your most persuasive office staff member.

### **Do you Card?**

The ClassCard add-in module is used to record attendance electronically. A report has been added to ClassCard for 2008 that a customer can print after check in that can then be provided to the teacher to gain access to the class. This can be helpful in situations where a customer account balance needs to be paid before the student can enter the class.

### **Someone is Watching...**

The ClassCam add-in module traps changes made to any ClassSmart transaction record. If a transaction record is edited or deleted, if even the transaction date is changed, ClassCam records the event in the background for review by a person with “Super User” security permissions. ClassCam 2008 widens the types of events that are added to the ClassCam ledger to include class archival and mass deletion activities.

### **The HTML Report**

The HTML Report, one of several AllClasses reports, has been modified to permit the printing of class Teachers' names in a variety of ways for posting on your website. You can print:

- first name only
- first name and 1<sup>st</sup> letter of the last name
- first and last name
- exclude the teacher name completely

### **Some Things Never Change**

ClassSmart's screens and reports still have the intuitive look and feel that you and your staff have grown accustomed to. There will not be much of a learning curve, if any at all, associated with ClassSmart 2008 if you are already familiar with earlier editions of ClassSmart.

### **Reserve Your Place Now!**

Upgrading to ClassSmart 2008 from ClassSmart 2007 or ClassSmart 2006 does not require a conversion of your existing files. Older editions of ClassSmart will require a file conversion. Please contact DataMax at **817-368-0105** now to reserve your file conversion window, or email us at **support@classsmart.com**.

