

ClassSmart™

QuickStart 2006 Guide

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DataMax™

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Administration

ClassSmart provides you with a wealth of features to properly manage your data and help you run your school more efficiently. The **A/R**, **Payment** and **Accounts** lists work together to balance your cash drawer each day, and let you see who still owes your school money.

The **Duplicates** screen traps parents with similar names and addresses to preclude redundancies in your **Mailing Labels** and errors in your accounts.

The **NoClass** feature displays students who were once in your program, but have not returned to classes.

The optional **ClassGraph™** add-in module for ClassSmart presents critical statistics and metrics to help you business develop more effective marketing plans based upon the demographics of your customers.

ClassSmart™

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Welcome

Welcome to the DataMax ClassSmart database management system! This guide will enable you to quickly get started with your new ClassSmart software. For a comprehensive discussion of all aspects and capabilities of this product, please refer to the user's guide and the on-line Help File.

License Agreement

ClassSmart software use is authorized under specific terms and conditions outlined in the license agreement that you accepted when you installed the program on your computer. Any use of ClassSmart or the loading of ClassSmart on a computer constitutes full acceptance of the terms and conditions contained in the license agreement.

Transactions

Managing customer accounts is easy with ClassSmart. Just select "Classes | QuickAccount!" from the menu bar to open a dialog box that displays everything you would want to know about a particular account.

You can view class history/lesson charges, see current class charges, enter adjustments, record product sales and accept payments - all from the QuickAccount!™ screen.

You can also print customer statements and allocate payment to your profit centers.

The Payments screen is available to help you manage your accounts as well. The Payment screen is a full screen presentation, whereas QuickAccount! is a more compact display.

Both screens take advantage of ClassSmart's double ledger system to ensure accuracy in your transactions.

Enrolling Students (cont)

the student in the list. Click your mouse once to place the student in the class. Use the “P” combo box to assign an existing parent to a new student.

When the number of students in the class equals the value shown in the “#” column of the class viewer, subsequent enrollments will be automatically placed on a waiting list for that class. You can manually move a student into a class from the waiting list if you desire. The number displayed in the “#” field is the minimum of the class size fields for the Class Level and Class Type, as previously described.

Use the “Spec” button to schedule special lessons such as make up lessons or to record an absence.

There too many features on the registration screen to describe in this QuickStart Guide. Please refer to the ClassSmart user’s guide for complete details.

System Requirements

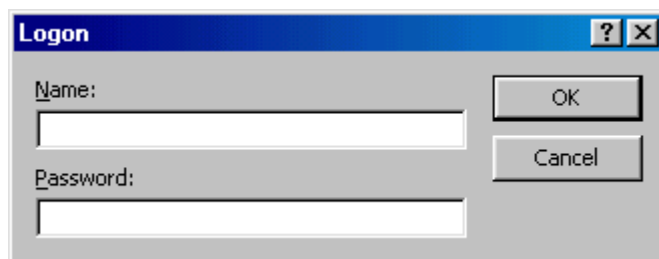
Before installing ClassSmart on your computer, please verify that your computer meets these minimum requirements:

- A personal computer with an Intel Pentium I or AMD A6 or higher processor operating at 133 MHz or higher.
- A hard disk with 60 MBytes of free space.
- A double speed or better CD-ROM drive.
- A Microsoft Mouse or compatible pointing device.
- A SVGA (800 pixel by 600 pixel) monitor display.
- 32 MBytes of RAM
- Microsoft® Windows® 95/98/2000 or Windows NT 4.0.
- Optional power and file backup devices
- Optional network equipment
- Optional Microsoft Word® Excel® and Outlook® software

Installation and Launch

To install ClassSmart, insert the CD into your CD-ROM drive. A dialog box should automatically be displayed. Click the ClassSmart button, and when prompted, please enter the custom installation code provided to you by DataMax. Follow the instructions on the screen to complete installation.

Following installation, double click the ClassSmart icon on your Windows' desktop and enter the account name and password provided to you by DataMax. The first time you open the program, you will be asked for a computer security password.



Enrolling Students

After creating your class schedule, you are ready to enroll students. Select “Classes | Registration” from the menu bar to begin.

The drop down boxes located at the top of the screen enable you to easily navigate to any class or groups of classes. You can also display classes based upon enrollment level. For example, you can show only classes that are not full.

To enroll a student, select the class of interest in the top spreadsheet on the Registration screen. The black arrow points to the selected class. Next, begin typing in the bottom spreadsheet. Specify student name, birthday, parent name and address, etc. The registration record is created for you as you type the information.

If the student was entered into ClassSmart from a previous enrollment, just use the “S” combo box to find

Creating Classes (cont)

create one or hundreds of classes with just a few key strokes.

Class Updates™ is used to fine tune the classes created by AutoClass or any set of classes shown on the classes screen. Class updates lets you change one or more class parameters, such as teacher, class level start time, session, etc.

As the name implies, **CopyClass™** replicates a group of existing classes. This makes it easy to create your Monday schedule using AutoClass, make adjustments to the parameters using Class Updates, and then copy the completed Monday schedule to Tuesday with CopyClass. You can copy a day, week, month even a year using CopyClass. You can also copy the students in the current classes to the new classes.

The Switchboard

When ClassSmart is opened, the first full screen displayed is the switchboard, which is the central navigational screen of the program. The switchboard is organized by category. There are four major divisions of features:

- Setup
- Classes
- Utilities
- Admin

Each category has a collection of features and capabilities associated with it. To access the various screens for each category, select the category of interest. The switchboard will keep the button depressed, even after you have released the mouse button. The buttons located on the right-hand portion of the switchboard will then be re-labeled in accordance with category button selected.

The Menu Bar

The ClassSmart menu bar, located at the top of each full size screen, duplicates the entries for each switchboard category. Several additional features are accessed via the menu bar, such as data file backup, user password changes and the ClassSmart Help file.

The menu bar is navigational aid to enable you to quickly move between ClassSmart screens.

Customizing ClassSmart

ClassSmart is a flexible program that easily adapts itself to your needs. There are a number of options and choices that you can make to tailor the program to your environment. Some of these settings must be made before beginning to use the program. These custom settings fall into four categories: global options, class attribute lists, class management settings and account setup.

Creating Classes

After completing the various setup and customization steps, you are ready to create classes and enroll students in those classes. Open the classes screen and specify an entry for each class attribute to manually create the class. The entries in each list correspond to the attribute list that you previously created, with the exception of the class times and dates.

Use the drop down boxes located in the blue banner area at the top of the classes screen to easily navigate to any class. The sorting criteria are identical to the class attributes.

ClassSmart can automatically create classes for you, using AutoClass™, Class Updates™ and CopyClass™. All of these capabilities are available on the Classes screen.

AutoClass™ creates a block of new, empty classes based upon input parameters that you specify. You can

Account Setup (cont)

The final aspects of ClassSmart setup are the adjustment types, retail item and payment method lists, all of which are available from the Accounts Setup screen in the Setup entry of the menu bar.

Enter your **Adjustment Types**, along with the default value of the adjustment. Examples of adjustment types might be credit, returned check fee, discounts, coupon and registration fee.

Enter your **Retail Products** and the unit price for the item. You can use the retail section of ClassSmart to record concession sales in addition to sports gear sales.

Enter your **Payment Methods**, examples of which are check, cash, credit card, gift certificates and refunds.

When you create a transaction record, you must specify an entry from one of these lists.

Global Options

The Options screen is used to set your school's name, address and other contact information. ClassSmart prints these fields on reports and billing statements.

The behavior of the automatic registration fee, the cost of special lessons, billing-by-the-class and automatic file backup features are all controlled by the Options screen.

Select "Setup | Options" from the menu bar to open the Options screen.

Class Attributes

After setting the global database options via the Options screen, it is time to create class attribute lists. When you create a class, one entry from each class attribute list will be needed to fully define and identify the class.

Each attribute list is accessed from the Setup category.

Class Attributes (cont)

Open the **Activities** screen and specify the programs offered by your school. Examples might be lessons, gymnastics, parties, aerobics music lessons and so forth. The Activities list must contain at least one entry in order to enable a class to be created.

Proceed to the **Sessions** screen and enter the program segments of your school. Examples might be Spring 2006, Summer 2006, 1Q06 or First Semester. If your school does not use sessions, then just enter one “dummy” session as a placeholder. Like the Activities list, the Sessions list must also contain at least one entry for a class to be created.

Open the **Facilities** screen to enter the locations where your lessons are administered. If lessons are taught at the same physical location as the corporate offices, then one entry in the facilities list will match the information on the Options screen.

Account Setup (cont)

Billing by the Lesson. If your classes are continuous, and do not have start and stop dates, then lesson billing might work best for you. To utilize lesson billing, leave the six class cost fields in the Class Levels list blank, and set the applicable lesson fee for each student. Each student in your database has their own set of custom lesson fee values.

When a student is enrolled in a class and you are billing by the lesson, ClassSmart will not immediately post a charge to the parent account (other than possibly the reg fee). Lesson billing records are created using the Lesson Billing screen, which is accessed from the Admin section of the menu bar.

Lesson billing takes holidays into account and also prorates the lesson charges based upon student entry and exit in your classes.

Account Setup (cont)

Billing by the Class. If your classes have definite start and stop dates, such that you re-enroll students in new classes each session, then class billing might work best for you. To utilize class billing, set the six class cost fields in the Class Levels list, and set the parent status field for each parent record. When a student is enrolled in a class, ClassSmart will lookup the class cost associated with the class type for the class, based upon the status field in the parent record.

When billing by the class, be sure to leave the student lesson fee fields blank. Class billing options are shown on the Options screen. You can elect to require full payment for the class, or bill monthly over a number of billing periods. Each student enrollment can have its own custom class billing plan, and you can change the settings in each registration record at any time.

Class Attributes (cont)

Class Levels are the major steps that a student takes while moving through your program. For example, Class Levels for a Tae Kwon Do school would be white, yellow, green, blue, red and black belt. The Class Level Size field is used by ClassSmart's automatic waiting list when the number of enrolled students reaches the smaller of this number and the commensurate field for a class on the Class Types screen.

Class Types describe how your school provides lessons, such as Weekly - 16, Twice per Week, or Private. The six cost fields are used in conjunction with the family status field to determine class cost when a student is enrolled in a class. If your school bills by the lesson, rather than by the class, leave these cost fields blank.

Class Attributes (cont)

The **Employees** screen creates a list of your teachers and office staff. You can also record notes and employment history for each employee. The teacher premium field adds the specified amount to the class cost when students are enrolled in classes. If your school bills by the lesson, rather than by the class, leave the teacher premium field blank.

Class Management and Reporting Settings

ClassSmart's class management and reporting options are accessed from the Setup entry of the menu bar. **Holidays** are used to calculate class and lesson charges. **Skills** enable you to track the incremental progression of students through your school. The **Removal Reasons**, **Referral Names** and parent **Occupations** lists provide you with a powerful marketing analysis toolset when used with **ClassGraph™**, the metric and graphical add-in module for ClassSmart.

Account Setup

ClassSmart enables you to bill your customers by the lesson or by the class, or even a combination of both. The money handling behavior of the database is controlled by the various account setup options. These settings are accessed from both the Options screen and the Accounts Setup screen.

The Options screen determines the charge for special lessons such as make-up lessons, fill-in lessons, evaluation lessons and class transfer fees. If you do not charge your customers for these situations, leave these fields blank. The operation of the annual registration fee is also programmed by the Options screen. You can automatically create the reg fee based upon the student anniversary date, or based upon the first class that they take for the calendar year. Payment due dates are specified by the Options screen as well.

The most important combination of settings in the entire database concerns class billing verses lesson billing.