

# Splash V6

Working with Family Data

---

Software Developed By: Computerize Limited

---

## Table of Contents

<b>Defining Family Details .....</b>	<b>1</b>
<i>Displaying the Family Home Screen .....</i>	1
The Family Record .....	1
Listing Family Records .....	4
<i>Displaying a List of Families (from Family Details) .....</i>	4
<i>Displaying a List of Families (from outside Family screen) .....</i>	4
Entering a New Family .....	5
<i>Adding a Student to the Family .....</i>	5
Finding a Family .....	7
Updating Family Details .....	7
Exiting a Family .....	8
Sending a SMS Message .....	9
Viewing a History of Payments .....	10
<i>Viewing or Reprinting a Receipt .....</i>	10
Generating Family Documents .....	12
<i>Adding an Attachment to an Email .....</i>	13
Creating a Family Statement .....	16
Deleting a Family Record .....	18
Sending a Broadcast SMS Message .....	19
Sending a Broadcast Email .....	20
Generating a Family Mail Merge .....	22
Importing Family Data .....	24
<i>Importing Records from Excel .....</i>	24
Exporting Family Data .....	26
<i>Exporting Records to Excel .....</i>	26
Printing Family Reports .....	28
<i>Printing a List of Families .....</i>	28
<i>Printing a Summary of Exits by Date .....</i>	30
<i>Printing a Summary of Referral Source .....</i>	31
<i>Printing a Summary of Exit Reasons .....</i>	33
<i>Printing a Summary of Postcodes .....</i>	34
Printing a Custom Report .....	35
<i>Displaying the Custom Report Dialog .....</i>	35
<i>Defining a Custom Report .....</i>	36
Printing a Chart .....	38
<i>Printing a Chart Showing Families by Referral Source .....</i>	38
<i>Printing a Chart Showing Families by Exit Reason .....</i>	39
<i>Printing a Chart Showing Families by Postcode .....</i>	40

## Defining Family Details

One record should exist in this module for every family attending the swim school. It includes a link to any children from the same household. Use this module to monitor family accounts and generate any family correspondence.

### Displaying the Family Home Screen

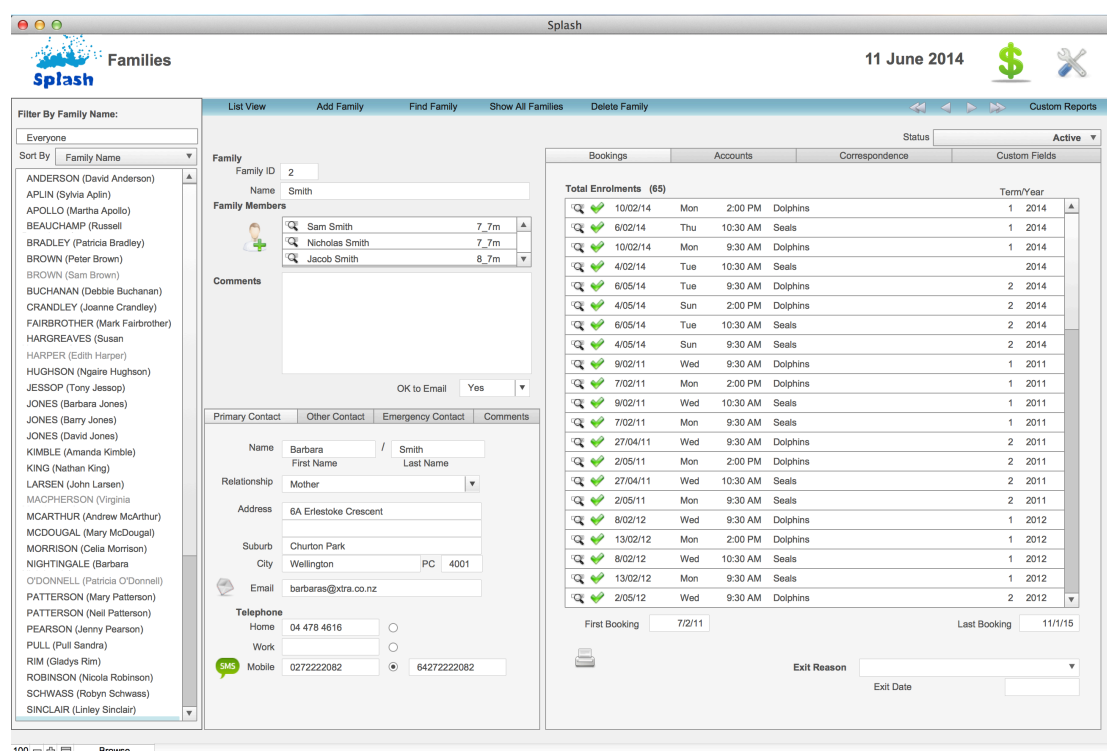
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families** icon



3. The Families data entry screen will be displayed

### The Family Record

The family record contains generic information about the family and members of the family. On the right of the screen you will see four tab cards; Bookings, Accounts, Correspondence, and Custom Fields.



**Families** 11 June 2014

Filter By Family Name: Everyone

Sort By: Family Name

Family ID: 2

Name: Smith

Family Members:

Name	Age
Sam Smith	7, 7m
Nicholas Smith	7, 7m
Jacob Smith	8, 7m

Comments:

OK to Email: Yes

Primary Contact: Barbara / Smith

Relationship: Mother

Address: 6A Erlestoke Crescent

Suburb: Churton Park

City: Wellington PC 4001

Email: barbaras@xtra.co.nz

Telephone:

Home	Work	Mobile
04 478 4616		0272222082

100 Browse

**Bookings**

Total Enrolments (65)

Date	Day	Time	Location	Term/Year
10/02/14	Mon	2:00 PM	Dolphins	1 2014
6/02/14	Thu	10:30 AM	Seals	1 2014
10/02/14	Mon	9:30 AM	Dolphins	1 2014
4/02/14	Tue	10:30 AM	Seals	2014
6/05/14	Tue	9:30 AM	Dolphins	2 2014
4/05/14	Sun	2:00 PM	Dolphins	2 2014
6/05/14	Tue	10:30 AM	Seals	2 2014
4/05/14	Sun	9:30 AM	Seals	2 2014
9/02/11	Wed	9:30 AM	Dolphins	1 2011
7/02/11	Mon	2:00 PM	Dolphins	1 2011
9/02/11	Wed	10:30 AM	Seals	1 2011
7/02/11	Mon	9:30 AM	Seals	1 2011
27/04/11	Wed	9:30 AM	Dolphins	2 2011
2/05/11	Mon	2:00 PM	Dolphins	2 2011
27/04/11	Wed	10:30 AM	Seals	2 2011
2/05/11	Mon	9:30 AM	Seals	2 2011
8/02/12	Wed	9:30 AM	Dolphins	1 2012
13/02/12	Mon	2:00 PM	Dolphins	1 2012
8/02/12	Wed	10:30 AM	Seals	1 2012
13/02/12	Mon	9:30 AM	Seals	1 2012
2/05/12	Wed	9:30 AM	Dolphins	2 2012

First Booking: 7/2/11 Last Booking: 11/1/15

Exit Reason: Exit Date

**NB:** Define the default telephone number by clicking the radio button to the right of the telephone number you would like to appear on all booking reports.

**NB:** Send a SMS directly to the selected family by clicking the SMS icon to the left of the Mobile telephone number.

**Family Bookings** – The Bookings tab card within the family file displays a list of all bookings made by the family. Each booking line displays the payment status, day, time, class name, and block. Catchups and exits are also displayed in the list, however they are colour coded to represent future catchups, current catchups, past catchups or exited bookings.

Navigate quickly to a selected booking by clicking the magnifier to the left of the required booking.

The screenshot shows the 'Splash Families' software interface. The top bar displays the date '11 June 2014' and a status 'Active'. The main window is divided into several sections:

- Filter By Family Name:** A dropdown menu set to 'Everyone' and a 'Sort By' dropdown set to 'Family Name'.
- Family List:** A list of families including ANDERSON (David Anderson), APLIN (Sylvia Aplin), APOLLO (Martha Apollo), BEAUCHAMP (Russell), BRADLEY (Patricia Bradley), BROWN (Peter Brown), BROWN (Sam Brown), BUCHANAN (Debbie Buchanan), CRANDLEY (Joanne Crandley), FAIRBROTHER (Mark Fairbrother), HARGREAVES (Susan), HARPER (Edith Harper), HUGHSON (Ngairie Hughson), JESSOP (Tony Jessop), JONES (Barbara Jones), JONES (Barry Jones), JONES (David Jones), KIMBLE (Amanda Kimble), KING (Nathan King), LARSEN (John Larsen), MACPHERSON (Virginia), MCARTHUR (Andrew McArthur), MCDUGAL (Mary McDougal), MORRISON (Celia Morrison), NIGHTINGALE (Barbara), O'DONNELL (Patricia O'Donnell), PATTERSON (Mary Patterson), PATTERSON (Neil Patterson), PEARSON (Jenny Pearson), PULL (Pull Sandra), RIM (Gladys Rim), ROBINSON (Nicola Robinson), SCHWASS (Robyn Schwass), and SINCLAIR (Linley Sinclair).
- Family Details:** A form for Family ID 2, Name Smith. It includes fields for Family Members (Sam Smith, Nicholas Smith, Jacob Smith), Comments, and contact information (Name, Relationship, Address, Suburb, City, Email, Telephone).
- Bookings Tab:** A table showing 'Total Enrolments (65)' with columns for Date, Time, Class, and Term/Year. The table lists various bookings for the Smith family, including enrolments for Dolphins and Seals classes.

**Family Accounts** – The Accounts tab card within the family file display a list of all payments made by the family for either bookings or products. Use this screen to review a history of payments or reprint a receipt.

The screenshot shows the 'Splash Families' software interface, specifically the 'Accounts' tab for Family ID 2 (Smith). The layout is similar to the previous screenshot, but the main area displays a list of payments instead of bookings.

- Filter By Family Name:** A dropdown menu set to 'Everyone' and a 'Sort By' dropdown set to 'Family Name'.
- Family List:** A list of families including ANDERSON (David Anderson), APLIN (Sylvia Aplin), APOLLO (Martha Apollo), BEAUCHAMP (Russell), BRADLEY (Patricia Bradley), BROWN (Peter Brown), BROWN (Sam Brown), BUCHANAN (Debbie Buchanan), CRANDLEY (Joanne Crandley), FAIRBROTHER (Mark Fairbrother), HARGREAVES (Susan), HARPER (Edith Harper), HUGHSON (Ngairie Hughson), JESSOP (Tony Jessop), JONES (Barbara Jones), JONES (Barry Jones), JONES (David Jones), KIMBLE (Amanda Kimble), KING (Nathan King), LARSEN (John Larsen), MACPHERSON (Virginia), MCARTHUR (Andrew McArthur), MCDUGAL (Mary McDougal), MORRISON (Celia Morrison), NIGHTINGALE (Barbara), O'DONNELL (Patricia O'Donnell), PATTERSON (Mary Patterson), PATTERSON (Neil Patterson), PEARSON (Jenny Pearson), PULL (Pull Sandra), RIM (Gladys Rim), ROBINSON (Nicola Robinson), SCHWASS (Robyn Schwass), and SINCLAIR (Linley Sinclair).
- Family Details:** A form for Family ID 2, Name Smith. It includes fields for Family Members (Sam Smith, Nicholas Smith, Jacob Smith), Comments, and contact information (Name, Relationship, Address, Suburb, City, Email, Telephone).
- Accounts Tab:** A table showing a list of payments with columns for Date, Inv ID, Description, and Amount. The table lists various payments for the Smith family, including payments for Dolphins and Seals classes.



**Family Correspondence** – The Correspondence tab card within the family file displays a list of all correspondence created for the selected family. To create a new item, simply click the Create Correspondence button.

The screenshot shows the Splash Families software interface. The top bar includes the Splash logo, the date '11 June 2014', and icons for currency and settings. The main window is divided into several sections:


- Filter By Family Name:** A dropdown menu set to 'Everyone' and a list of family names including Anderson, Aplin, Apollo, Beauchamp, Bradley, Brown, Buchanan, Crandley, Fairbrother, Hargreaves, Harper, Hughson, Jessop, Jones, Kimble, King, Larsen, Macpherson, McArthur, McDougal, Morrison, Nightingale, O'Donnell, Patterson, Pearson, Pull, Rim, Robinson, Schwass, and Sinclair.
- Family Information:**
  - Family ID: 2
  - Name: Smith
  - Family Members: A list with checkboxes for Sam Smith (7.7m), Nicholas Smith (7.7m), and Jacob Smith (8.7m).
  - Comments: A text area for notes.
  - Primary Contact: Barbara Smith, Mother, 6A Erlestoke Crescent, Churton Park, Wellington, PC 4001. Email: barbaras@xtra.co.nz.
  - Telephone: Home (04 478 4616), Work, and Mobile (0272222082).
- Correspondence Tab:** A list of correspondence items with columns for date, type, and name. Items include 'Happy Birthday' letters and emails, 'Email Receive - complaint', 'Booking', 'Swim School Multiple Booking Confirmation', 'Reminder', and 'Email' messages.
- Custom Fields Tab:** A section for storing additional family information, including five text fields (Custom One to Custom Five) and two date fields (Custom Date 1 and Custom Date 2).

**Family Custom Fields** – The Custom Fields tab card within the family file displays seven additional fields for storing information about the family. Five text fields and two date fields have been created for custom use. Define the labels for your custom fields in the Preferences area of the database.

This screenshot is identical to the one above, showing the same Splash Families software interface. It highlights the 'Custom Fields' tab, which contains five text input fields labeled 'Custom One' through 'Custom Five', and two date input fields labeled 'Custom Date 1' and 'Custom Date 2'. The rest of the interface, including the family list, family details for Barbara Smith, and the correspondence list, remains the same.

## Listing Family Records

Each record in your database can be displayed in either the entry screen or list view. List view will display all records in the found set – see the bottom left corner of the screen for the size of the current found set.



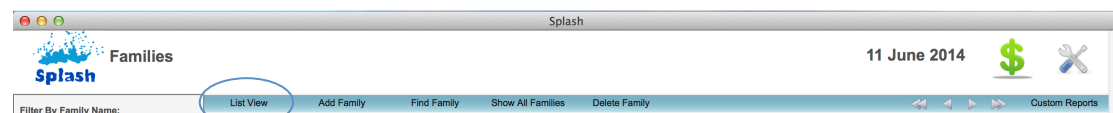
Families									
Find Family Named: Everyone 11 June 2014									
Sort By	Family Name	Contact Name	Address	Children	Discount	Telephone	Last Booking	Select for Merge	Custom Reports
ID	Family Name	Contact Name	Address	Children	Discount	Telephone	Last Booking	Select for Merge	
2	Smith	Barbara Smith	6A Erlestoke Crescent, Churton Park, Wellington 4001	Jacob, Sam, Nicholas	5%	0272222082	11/1/2015	<input checked="" type="checkbox"/>	
9	Smith	Daniel Smith	89 Roberta Road, Tawa 4008	Jason, Phillip, Jennifer,		0272222082	11/1/2015	<input checked="" type="checkbox"/>	
10	Brown	Sam Brown	345 Nowhere St, Brooklyn, Wellington 4009	Bobby, Celia, Amanda,		04 564 3212	11/1/2015	<input type="checkbox"/>	
11	Anderson	David Anderson	876 Somewhere Rd, Tawa, Wellington 4010	Jamie, Amelia, Sally		09 897 9845	11/1/2015	<input checked="" type="checkbox"/>	
14	zimmerman	Andy zimmerman	786 another road, Porirua, Wellington 4008	Zac, Amanda, JOSEPH		09 765 1445	6/5/2016	<input type="checkbox"/>	
15	Thomson	Anthony Thomson	25 Churton Drive, Churton Park, Wellington 4001	Caroline, Bobby, John,		027 2222082	9/1/2015	<input type="checkbox"/>	
16	King	Nathan King	46 Brooklyn Rd, Brooklyn, Wellington 4008	David, Craig		05 678 4564	11/1/2015	<input checked="" type="checkbox"/>	
33	Taylor	Martha Taylor	79 Main St, Tawa, Wellington 4010	Georgia, Bruce, Denise	.05	04 236 9137	11/1/2015	<input type="checkbox"/>	

Displaying all (Total of 48) Find Marked Unmark Found Set Mark Found Set

**NB:** Click magnifier to the left of the Family Name to display the data entry screen.

### Displaying a List of Families (from Family Details)

1. Click once the **List View** button displayed in the blue stripe at the top of your screen.



2. The Families List View screen will be displayed

### Displaying a List of Families (from outside Family screen)

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families List** icon



3. The Families List View screen will be displayed

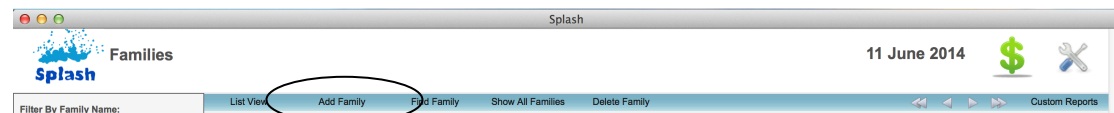
## Entering a New Family

A new family record must be created whenever a new family joins the school. A student cannot be booked in to a session unless the family has been registered within Splash.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families** icon



3. The Families data entry screen will be displayed



2. Click once on the **Add Family** button displayed in the blue stripe at the top of your screen.
3. The **Add New Family** dialog will be displayed.


A screenshot of the 'Add New Family' dialog box. The dialog has a title bar 'Add New Family' and a sub-header 'Enter New Family Details'. It contains several input fields: 'Family Name' (filled with 'Rim'), 'Primary Contact' section with 'Name' (split into 'First Name' 'Gladys' and 'Last Name' 'Rim'), 'Relationship' (dropdown set to 'Mother'), 'Address' (filled with '322 New Horizon Blvd'), 'Suburb' (filled with 'Johnsonville'), 'City' (filled with 'Wellington'), 'PC' (filled with '4008'), 'Email' (filled with 'gladys.rim@rim.org'), and 'Telephone' section with 'Home' (478 5674), 'Work', and 'Mobile' (027 543 2287) fields. There are also fields for 'Referred From', 'Referral Family (if applicable)', 'Discount Rate', 'Type', and 'Payment by Direct Debit' (set to 'No'). An 'Alert Message' field is at the bottom. At the very bottom are 'Cancel' and 'Done' buttons.

4. Complete as many details as possible within the dialog and click the **Done** button to save the details and return to the family entry screen.
5. Continue below to add family members

## Adding a Student to the Family

6. Ensure the correct family record is displayed on your screen.
7. Click the **Add Student** button to display the Add New Student dialog.
8. Complete as many details as possible within the dialog and click the **Done** button to save the student details and return to the family entry screen.
9. Repeat steps 6 & 7 above until all family members have been added.

Add New Student



Enter New Student Details

Name

George / Rim

First NameLast Name

Personal Details

Date of Birth6/2/2008Age6

Gender☐ Female☒ Male


MedicalGlasses

Comments

Discount RateType

Rollover BookingsYes

Preferred Client

 Family Details


Family NameRim


ContactGladys Rim

Address322 New Horizon Blvd,  
Johnsonville,  
Wellington 4008

Telephone027 543 2287

Emailgladys.rim@rim.org

 Cancel

Done

User Documentation – Splash V6.0

Page 6

## Finding a Family

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families Find** icon



3. The **Search for a Family** dialog box will be displayed on your screen.

4. Enter the criteria for your find by typing your request in the corresponding field/s.
5. Click the **Find Now** button.
6. If one record is located the record will be displayed on the Family entry screen. If multiple records are located the found set will be displayed in the list view.

**NB:** See *Advanced Find Techniques* within this guide for assistance with Constraining or Extending the found set.

## Updating Family Details

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. When the correct family screen is displayed simply overwrite any of the information to update the information that has been stored.

## Exiting a Family

When all members of a family have withdrawn from lessons it is important you record the reason why there will be no further bookings. Information entered for exited families can be monitored in exit summary reports.

1. Use the **Finding a Family** function to locate the family record you wish to exit.
2. When the correct family screen is displayed update the **Reason for Exit** field and enter the **Exit Date**.

The screenshot shows the 'Families' screen in the Splash software. On the left is a list of families to search. The main area shows the details for the 'Smith' family, including contact information and a list of family members. On the right, the 'Bookings' tab is selected, displaying a table of lessons. The 'Exit Reason' dropdown menu is open, showing options: Financial, Goals Met, Other, Other Commitments, Poor Service, and Discontinuation.

**NB:** Exit information may also be entered in the comments tab card in the centre of the family record screen

This screenshot shows the 'Comments' tab within the family record. It contains several input fields for recording exit information. Blue arrows point to the 'Exit Reason' and 'Exit Date' fields, highlighting where this information should be entered.

## Sending a SMS Message

SMS messages can be sent to individual recipients or all recipients in the found set. This command outlines the process for sending an SMS message to the current family. This command will only be successful if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. When the correct family screen is displayed simply click the SMS button displayed to the left of the Mobile telephone number.



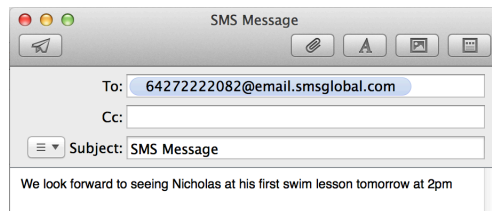
The screenshot shows the 'Families' application interface. On the left is a list of family names. The main area displays the details for the 'Smith' family (Family ID 2). Under 'Family Members', three members are listed: Sam Smith (7, 7m), Nicholas Smith (7, 7m), and Jacob Smith (8, 7m). Below this is a section for 'Primary Contact' with details for Barbara Smith, including her address, city, and email. To the right of the contact details is a table of 'Total Enrolments (65)' with columns for date, day, time, activity, and term/year. At the bottom of the contact details, there are fields for 'Home', 'Work', and 'Mobile' phone numbers. The 'SMS' button is circled next to the mobile number field.

3. The **Enter New SMS** dialog will be displayed on your screen.

The 'Enter New SMS' dialog box is shown. It has a title bar 'Create SMS' and a sub-header 'Enter New SMS'. Below the header is a text area for the message. The message text is: 'We look forward to seeing Nicholas at his first swim lesson tomorrow at 2pm'. Below the text area, it says 'Message Length : 75 Chars'. At the bottom are two buttons: 'Cancel' and 'Done'.

4. Enter the message you wish to send.
5. Click the **Done** button to send your message and return to the family entry screen.

**NB:** Each SMS message is sent via your email application as per the sample below.



## Viewing a History of Payments

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. Click once on the **Accounts** tab card displayed on the right of the screen.

The screenshot shows the 'Splash Families' software interface. The 'Accounts' tab is selected, displaying a list of payments. The left sidebar shows a list of families, and the top right shows the date '11 June 2014'.

Date	Inv ID	Description	Amt
3/05/14	146915	Vorgee Jnr \$21	\$21.00
3/05/14	146915	Sam Smith - Dolphins - 9:30 AM Wed (Term 4 2014)	\$76.50
3/05/14	146915	Lucas Smith - Dolphins - 2:00 PM Sun (Term 4 2014)	\$81.00
3/05/14	146915	Missile Goggles \$30	\$29.00
2/05/14	146899	Nicholas Smith - Dolphins - 9:30 AM Sun (Term 3 2014)	-\$9.00
2/05/14	146899	Sam Smith - Dolphins - 9:30 AM Wed (Term 4 2014)	\$76.50
2/05/14	146899	Boys Bathers	\$0.00
2/05/14	146899	Missile Goggles \$30	\$30.00
29/04/14	146855	Sam Smith - Dolphins - 9:30 AM Tue (Term 4 2014)	-\$15.00
29/04/14	146855	Lucas Smith - Dolphins - 2:00 PM Sun (Term 3 2014)	\$108.00
29/04/14	146863	Missile Goggles \$30	\$30.00
29/04/14	146863	Sam Smith - Dolphins - 9:30 AM Wed (Term 3 2014)	-\$30.00
29/04/14	146863	Nicholas Smith - Seals - 1:00 PM Wed (Term 3 2014)	\$108.00
29/04/14	146863	Nicholas Smith - Seals - 1:00 PM Wed (Term 4 2014)	\$81.00
28/04/14	146833	Sam Smith - Dolphins - 9:30 AM Wed (Term 3 2014)	\$102.00

## Viewing or Reprinting a Receipt

1. Use the **Finding a Family** function to locate the family record you wish to update.
2. Click once on the **Accounts** tab card displayed on the right of the screen.
3. Click once on the **magnifier** displayed to the left of the required payment.



4. A copy of the receipt will be displayed on your screen.



Invoice 146915

**YOUR SCHOOL NAME HERE**  
 Street Address, 2nd Line of Street Address, Suburb, CITY  
 Telephone: Fax:

**COMPUTER-  
IZE  
LIMITED**

GST: 123-456-789

**Invoice # : 146915 (POS 1)**  
 3/05/2014 12:40:55 pm

Barbara Smith  
 6A Eriestoke Crescent,  
 Churton Park,  
 Wellington 4001

Thank you for your payment for the following items:

Description	Qty	Unit \$	Total
Vorgee Jnr \$21	1	\$21.00	\$21.00
Sam Smith - Dolphins - 9:30 AM Wed (Term 4 2014)	1	\$76.50	\$76.50
Lucas Smith - Dolphins - 2:00 PM Sun (Term 4 2014)	1	\$81.00	\$81.00
Missile Goggles \$30	1	\$29.00	\$30.00
<b>Total Inc GST</b>			\$207.50
<b>GST Amt</b>			\$6.52
<b>Payment Method</b>			
E/tpos			\$188.50

Close Print

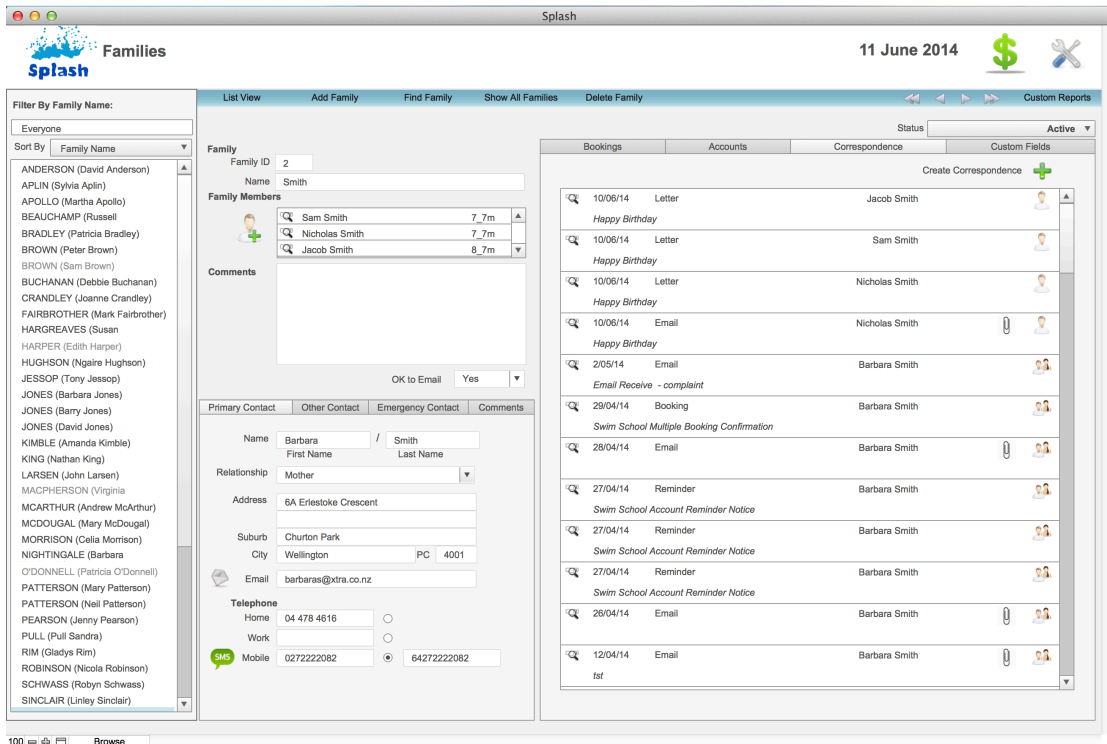
- Click the **Print** button to reprint the receipt or click **Close** to return to the family screen without printing the receipt.

## Generating Family Documents

The Correspondence tab card within the family file displays a list of all correspondence created for the selected family (with the exception of broadcast email or SMS messages).

Document records can be created as letters, emails, SMS messages, or file notes.

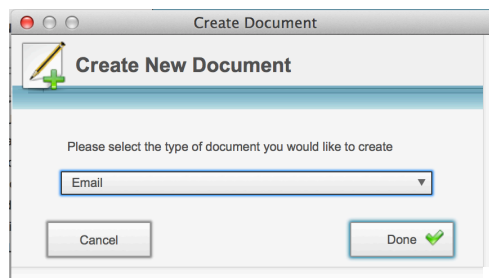
1. Use the **Finding a Family** function to locate the family record you wish to update.
2. Click once on the **Correspondence** tab card displayed on the right of the screen.



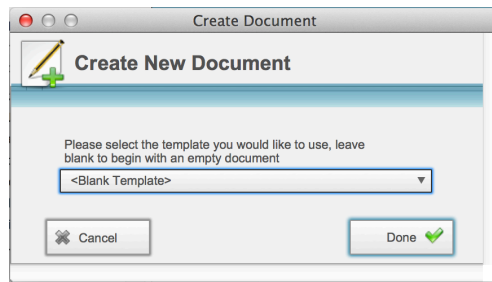
3. Click once on the **Add Correspondence** button to display the **Create Document** dialog box.



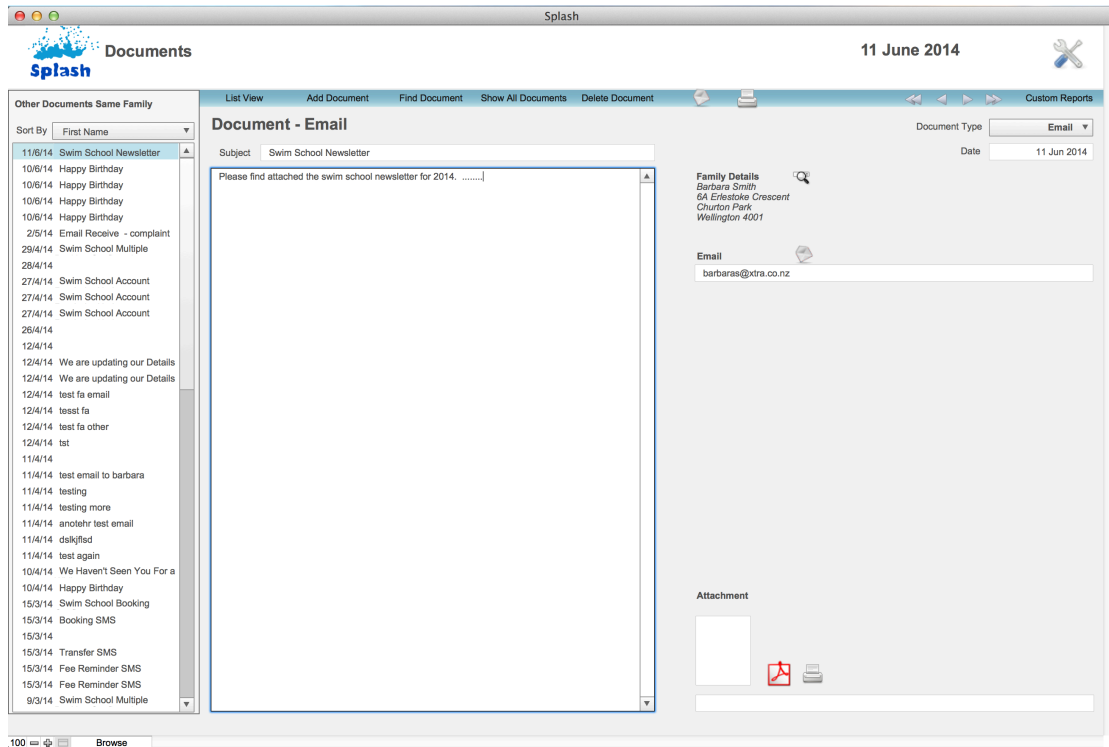
4. Choose the type of document you want to create and click the **Done** button.



5. The **Create Document** dialog box will be displayed on your screen. Select the document you wish to use or click Use Blank Document and click **Done**.

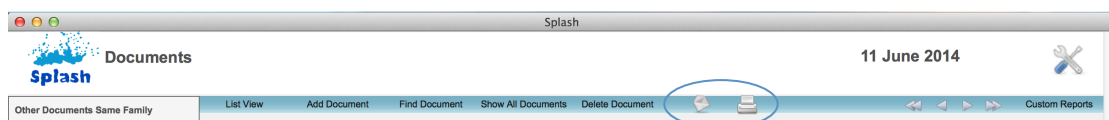


6. The selected document will be displayed on your screen.



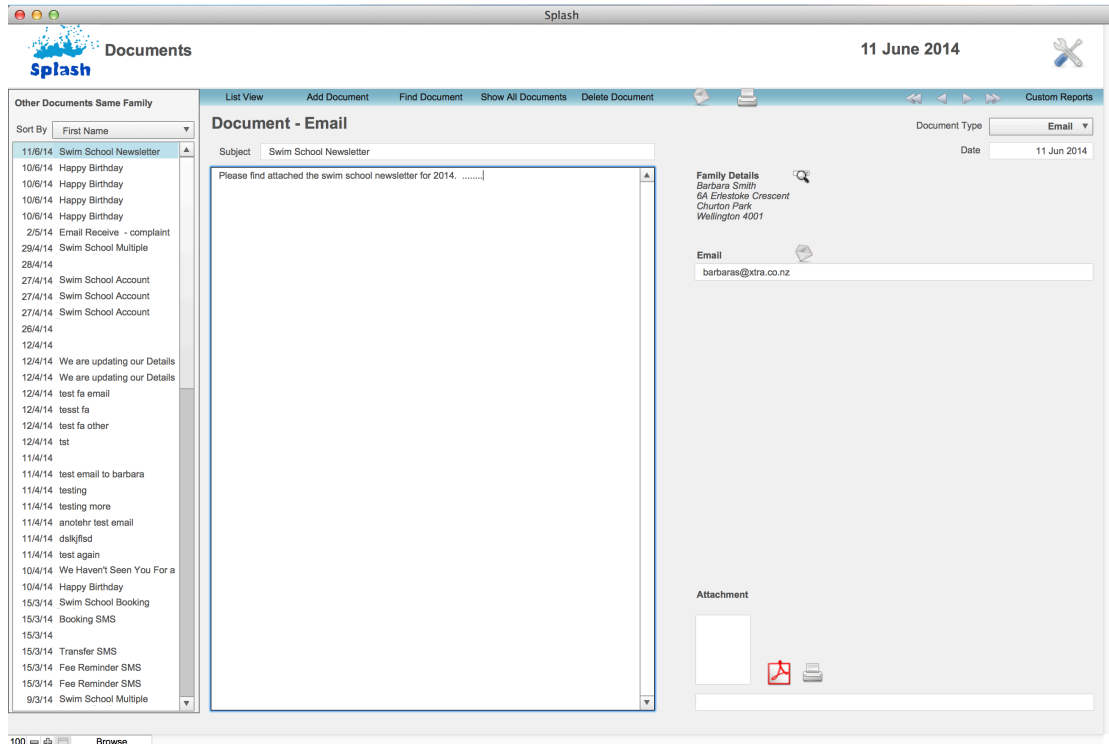
7. Edit the document as necessary.

8. Click the **Print** or **Email** button.



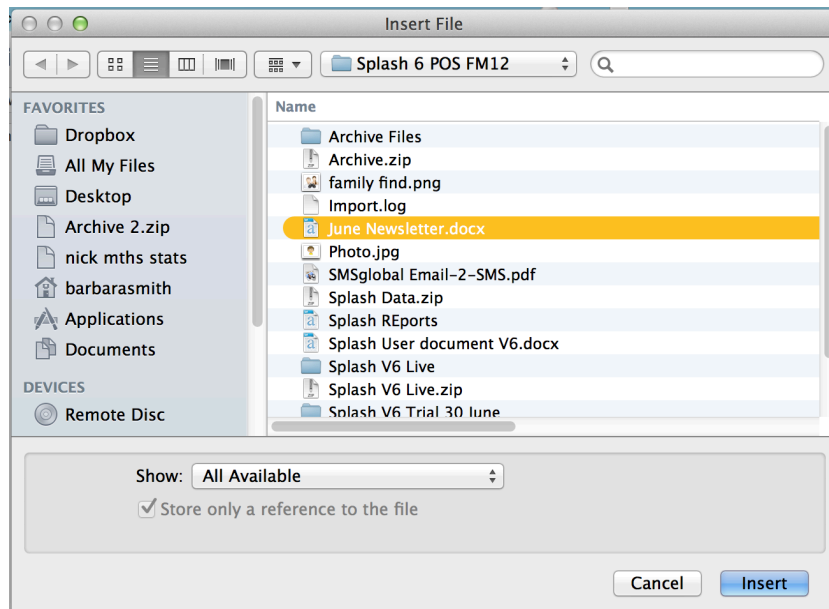
### *Adding an Attachment to an Email*

When an email is created you have the option of including an attachment with your message. Although the attachment icon is displayed as a pdf symbol any document type can be included.

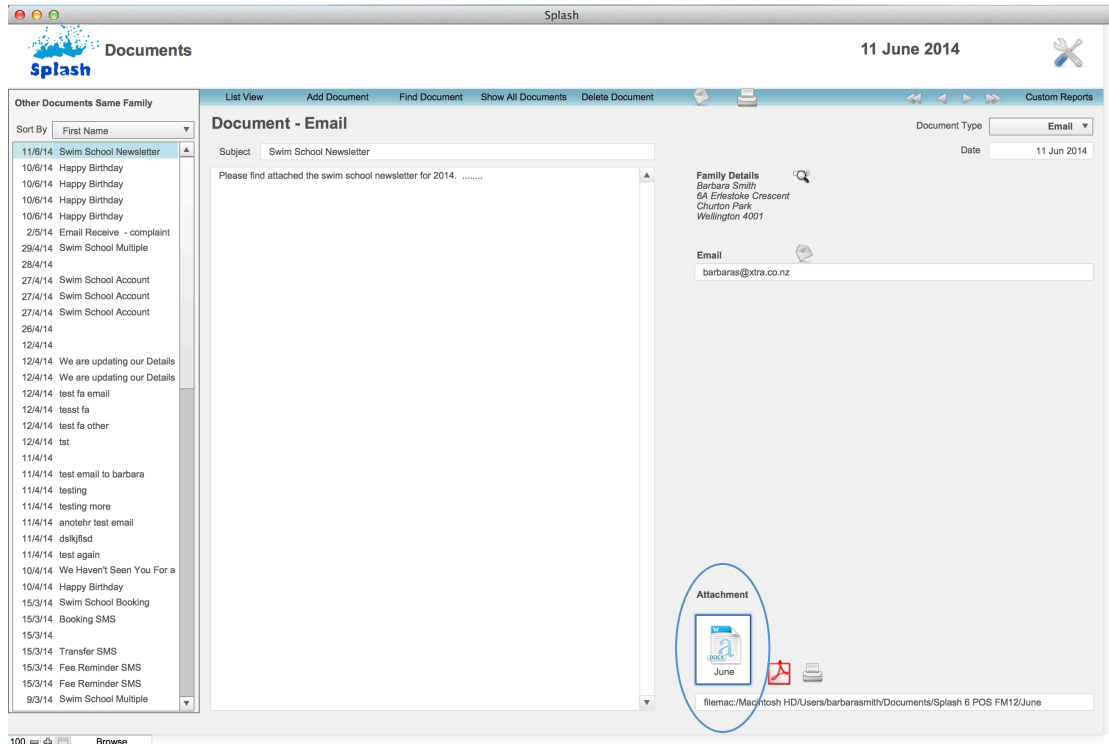


**NB:** The Attachment field and buttons are only on the screen for email document types.

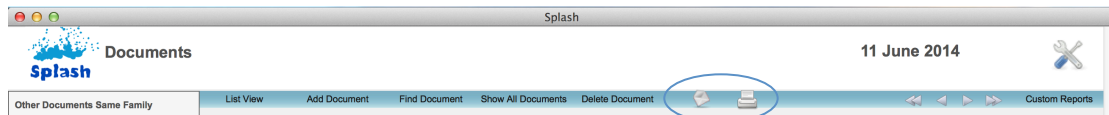
1. Ensure the correct email document is displayed on your screen.
2. Click once on the **Insert PDF** button.
3. The Insert File dialog will be displayed on your screen. Locate the file you wish to attach and click the Insert button.



4. The inserted document will appear in the Attachment field on the selected record.



5. Click the **Print** or **Email** button.



## Creating a Family Statement

A family statement contains a list of bookings for the selected family. The list can be filtered to show a selection of bookings or can include all bookings ever recorded for the family. The subsequent report can be printed or automatically emailed to the selected family.

1. Use the **Finding a Family** function to locate the family record you wish to produce.
2. When the correct family screen is displayed simply click the **Print Statement of Activity** button below the list of bookings.

The screenshot shows the 'Families' window in the Splash software. On the left, there is a 'Filter By Family Name' dropdown set to 'Everyone' and a list of family names. The main area displays the details for the 'Smith' family (Family ID 2). The 'Family Members' section lists Sam Smith (7.7m), Nicholas Smith (7.7m), and Jacob Smith (8.7m). The 'Primary Contact' section shows Barbara Smith, Mother, with contact details for address, phone, and email. On the right, the 'Bookings' tab is active, showing a list of 65 total enrolments. The list includes columns for date, day, time, activity, and term/year. A 'Print' button is circled below the bookings list. The status bar at the bottom indicates '100' and 'Browse'.

3. The **Specify Records for Reporting** dialog will be displayed on your screen.
4. Select one of the following;

**Balance** – to include bookings with an outstanding balance  
**Some** – to include bookings within a specified date range  
**All** – to include all bookings ever made for related family members

The dialog box titled 'Specify Records for Reporting' asks: 'Would you like to include ALL booking records or SOME bookings records or only bookings with a BALANCE in the activity report'. There are three buttons: 'Balance', 'Some', and 'All'. The 'All' button is highlighted with a blue border.

5. The report will be previewed on your screen.

Bookings - Current Balance of Booking						Cost	Paid	Balance
Balance as at 11/6/2014						(Less Discount/Credits)		
Smith (Barbara Smith)		0272222082		\$1,694.50			\$0.00	\$1,694.50
Jacob Smith	Seals	Mon	BS	Term: 1A	2014	\$70.00	\$0.00	\$70.00
Lucas Smith	Dolphins	Sun	BS	Term: 3	2014	\$108.00	\$0.00	\$108.00
Lucas Smith	Dolphins	Sun	BS	Term: 3	2014	\$108.00	\$0.00	\$108.00
Lucas Smith	Dolphins	Sun	BT	Term: 4	2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 4	2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BS	Term: 4	2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 4	2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 1	2015	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 1	2015	\$81.00	\$0.00	\$81.00
Nicholas Smith	Seals	Wed	BS	Term: 1	2015	\$81.00	\$0.00	\$81.00
Nicholas Smith	Seals	Wed	BS	Term: 1	2015	\$81.00	\$0.00	\$81.00
Sam Smith	Seals	Wed	BT	Term: 3	2014	\$72.00	\$0.00	\$72.00
Sam Smith	Seals	Wed	BS	Term: 4	2014	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 4	2014	\$76.50	\$0.00	\$76.50
Sam Smith	Seals	Wed	BS	Term: 4	2014	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 4	2014	\$76.50	\$0.00	\$76.50
Sam Smith	Seals	Wed	BS	Term: 4	2014	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Tue	BS	Term: 1	2015	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 1	2015	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 1	2015	\$76.50	\$0.00	\$76.50
Sam Smith	Seals	Wed	BS	Term: 1	2015	\$76.50	\$0.00	\$76.50

11/6/2014 : 09:10:52 AM

Page 1

- Press **Enter** or click the continue button to progress to the print or email options.
- Select whether you wish to **Email** or **Print** the selected report (or choose Cancel to return to the family file without printing or emailing).

Message

Do you want to PRINT or EMAIL the Summary of Family Activity?

Cancel

Email

Print

**NB:** If Email is selected the email will be displayed with the document attached.

Activity Report for Family

To: barbasas@extra.co.nz

Cc:

Subject: Activity Report for Family

Please find attached the latest record of activity for the Smith family.

Bookings - Current Balance of Booking

Balance as at 11/6/2014

						Cost	Paid	Balance
						(Less Discount/Credits)		
Smith (Barbara Smith)		0272222082		\$1,694.50			\$0.00	\$1,694.50
Jacob Smith	Seals	Mon	BS	Term: 1A	2014	\$70.00	\$0.00	\$70.00
Lucas Smith	Dolphins	Sun	BS	Term: 3	2014	\$108.00	\$0.00	\$108.00
Lucas Smith	Dolphins	Sun	BS	Term: 3	2014	\$108.00	\$0.00	\$108.00
Lucas Smith	Dolphins	Sun	BT	Term: 4	2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 4	2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BS	Term: 4	2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 4	2014	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 1	2015	\$81.00	\$0.00	\$81.00
Lucas Smith	Dolphins	Sun	BT	Term: 1	2015	\$81.00	\$0.00	\$81.00
Nicholas Smith	Seals	Wed	BS	Term: 1	2015	\$81.00	\$0.00	\$81.00
Nicholas Smith	Seals	Wed	BS	Term: 1	2015	\$81.00	\$0.00	\$81.00
Sam Smith	Seals	Wed	BT	Term: 3	2014	\$72.00	\$0.00	\$72.00
Sam Smith	Seals	Wed	BS	Term: 4	2014	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 4	2014	\$76.50	\$0.00	\$76.50
Sam Smith	Seals	Wed	BS	Term: 4	2014	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 4	2014	\$76.50	\$0.00	\$76.50
Sam Smith	Seals	Wed	BS	Term: 4	2014	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Tue	BS	Term: 1	2015	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 1	2015	\$76.50	\$0.00	\$76.50
Sam Smith	Dolphins	Wed	BT	Term: 1	2015	\$76.50	\$0.00	\$76.50
Sam Smith	Seals	Wed	BS	Term: 1	2015	\$76.50	\$0.00	\$76.50

## Deleting a Family Record

As a rule a record should only be deleted if it was made in error. To ensure data integrity a family record can only be deleted if there are no bookings or payments attached. Family records can be deleted from either the Family entry screen or the list view.

1. Use the **Finding a Family** function to locate the family record you wish to exit.
2. When you can see the correct family record on your screen.



6. Click once on the **Delete Family** button.
7. A dialog will be displayed asking you to confirm the family record should be deleted.



8. Click **OK** to delete the record or **Cancel** to return to the family screen without making a change.



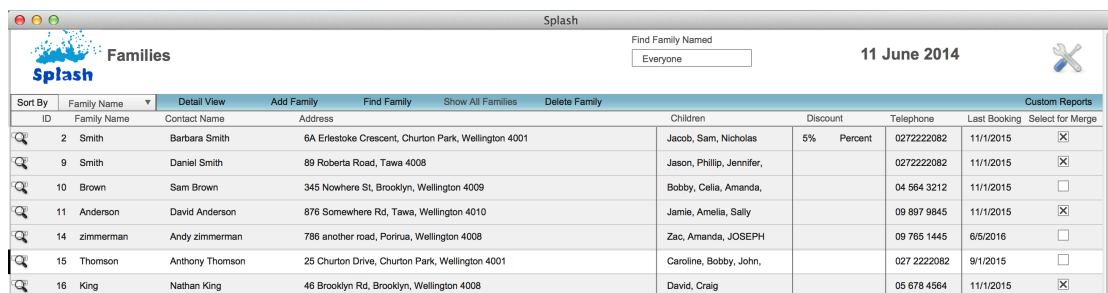
## Sending a Broadcast SMS Message

A broadcast SMS is a single message sent to multiple recipients. A SMS message sent in this way will not be recorded on the family file.

Group SMS messages are sent to all recipients in the found set that have a valid mobile telephone number stored on file.

This function will only be successful if you have configured your system defaults to send SMS messages and you have created an account with SMSGlobal.

1. Use the **Finding a Family** function to locate the group of records you wish to send a message to.
2. The found set of records will be displayed in a list on your screen (if the list is incorrect repeat step 1).



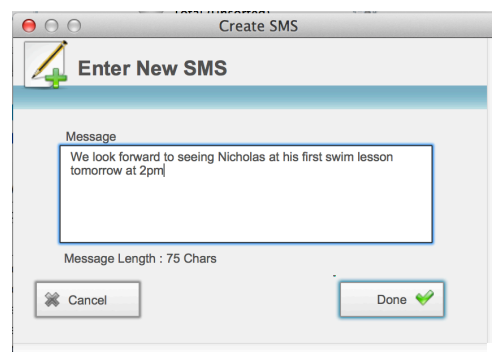
The screenshot shows the 'Families' window in the Splash application. At the top, there's a search bar for 'Find Family Named' with 'Everyone' entered, and a date '11 June 2014'. Below the search bar is a table with columns: ID, Family Name, Contact Name, Address, Children, Discount, Telephone, Last Booking, and Select for Merge. The table contains 16 rows of family data.

ID	Family Name	Contact Name	Address	Children	Discount	Telephone	Last Booking	Select for Merge
2	Smith	Barbara Smith	6A Eriestoke Crescent, Churton Park, Wellington 4001	Jacob, Sam, Nicholas	5%	0272222082	11/1/2015	<input checked="" type="checkbox"/>
9	Smith	Daniel Smith	89 Roberta Road, Tawa 4008	Jason, Phillip, Jennifer,		0272222082	11/1/2015	<input checked="" type="checkbox"/>
10	Brown	Sam Brown	345 Nowhere St, Brooklyn, Wellington 4009	Bobby, Celia, Amanda,		04 564 3212	11/1/2015	<input type="checkbox"/>
11	Anderson	David Anderson	876 Somewhere Rd, Tawa, Wellington 4010	Jamie, Amelia, Sally		09 897 9845	11/1/2015	<input checked="" type="checkbox"/>
14	zimmerman	Andy zimmerman	786 another road, Porirua, Wellington 4008	Zac, Amanda, JOSEPH		09 765 1445	6/5/2016	<input type="checkbox"/>
15	Thomson	Anthony Thomson	25 Churton Drive, Churton Park, Wellington 4001	Caroline, Bobby, John,		027 2222082	9/1/2015	<input type="checkbox"/>
16	King	Nathan King	46 Brooklyn Rd, Brooklyn, Wellington 4008	David, Craig		05 678 4564	11/1/2015	<input checked="" type="checkbox"/>

3. Select the **Scripts** menu... choose **Send SMS**...choose **Send SMS to Family [Found Set]**.
4. A dialog will be displayed on your screen warning that you are about to send multiple SMS messages. Click **OK** to continue or Cancel or exit the script.

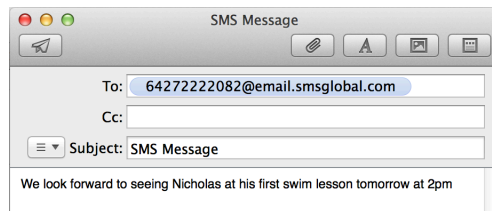


5. The **Enter New SMS** dialog will be displayed on your screen.



6. Enter the message you wish to send.
7. Click the **Done** button to send your message and return to the family entry screen.

**NB:** Each SMS message is sent via your email application as per the sample below. You can view the messages that have been sent if you look within the Sent Items folder of your email application.

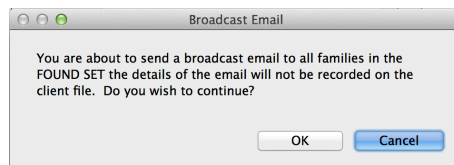


## Sending a Broadcast Email

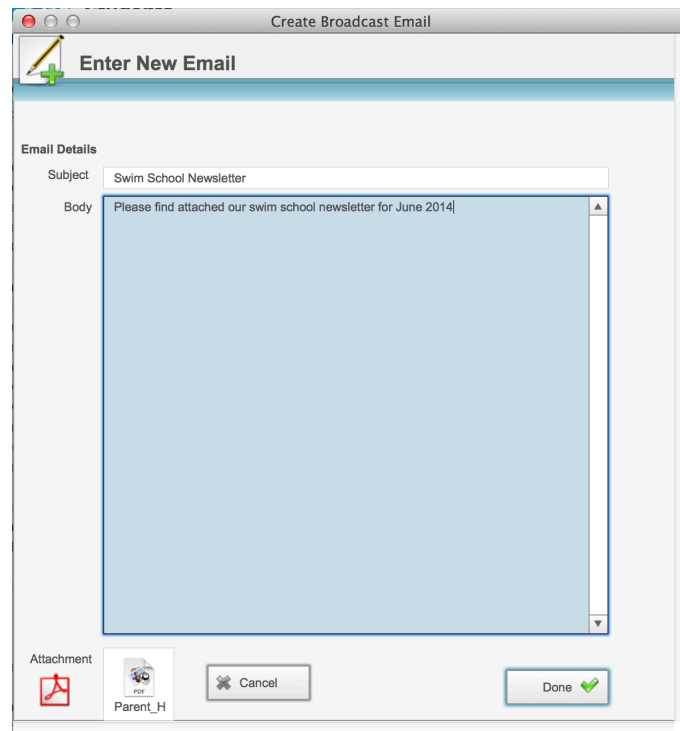
A broadcast email is a single email sent to multiple recipients. An email sent in this way will not be recorded on the family file.

Group email messages are sent to all recipients in the found set that have a valid email address stored on file.

1. Use the **Finding a Family** function to locate the group of records you wish to send a message to.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Send Broadcast Email** from the **Scripts** Menu.



4. A dialog will be displayed on your screen warning that you are about to send multiple email messages. Click **OK** to continue or Cancel or exit the script.
5. The **Enter Broadcast Email** dialog will be displayed on your screen.

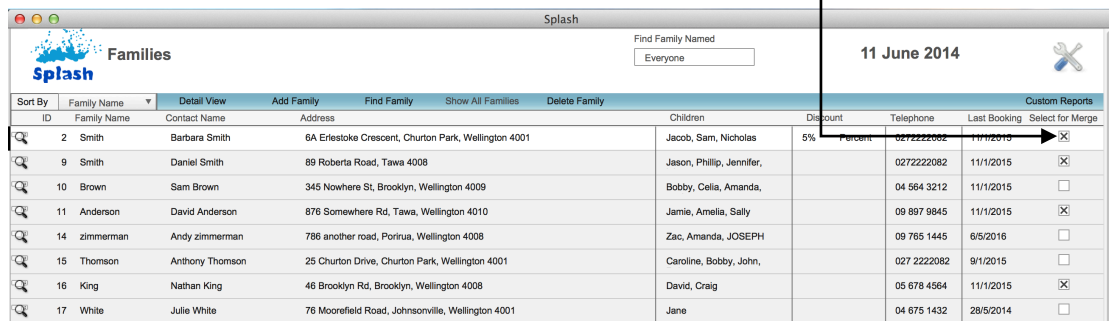


6. Enter the message you wish to sent and attach a document if required.
7. Click the **Send** button.

**NB:** To ensure the privacy of all clients the email address will automatically be placed in the BCC box. You can view the messages that have been sent if you look within the Sent Items folder of your email application.

## Generating a Family Mail Merge

The mail merge function within Splash operates using a marked record system. All marked records will be included in the mail merge. Marked families appear in the Family listing with a cross in the box on the far right of the screen.



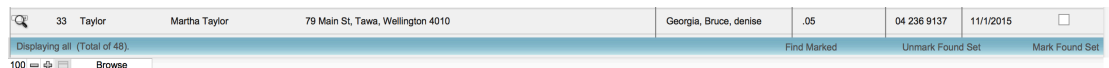
ID	Family Name	Contact Name	Address	Children	Discount	Telephone	Last Booking	Select for Merge
2	Smith	Barbara Smith	6A Erlestoke Crescent, Churton Park, Wellington 4001	Jacob, Sam, Nicholas	5%	0272222082	11/1/2015	<input checked="" type="checkbox"/>
9	Smith	Daniel Smith	89 Roberta Road, Tawa 4008	Jason, Phillip, Jennifer,		0272222082	11/1/2015	<input checked="" type="checkbox"/>
10	Brown	Sam Brown	345 Nowhere St, Brooklyn, Wellington 4009	Bobby, Celia, Amanda,		04 564 3212	11/1/2015	<input type="checkbox"/>
11	Anderson	David Anderson	876 Somewhere Rd, Tawa, Wellington 4010	Jamie, Amelia, Sally		09 897 9845	11/1/2015	<input checked="" type="checkbox"/>
14	zimmerman	Andy zimmerman	786 another road, Porirua, Wellington 4008	Zac, Amanda, JOSEPH		09 765 1445	6/5/2016	<input type="checkbox"/>
15	Thomson	Anthony Thomson	25 Churton Drive, Churton Park, Wellington 4001	Caroline, Bobby, John,		027 2222082	9/1/2015	<input type="checkbox"/>
16	King	Nathan King	46 Brooklyn Rd, Brooklyn, Wellington 4008	David, Craig		05 678 4564	11/1/2015	<input checked="" type="checkbox"/>
17	White	Julie White	76 Moorefield Road, Johnsonville, Wellington 4001	Jane		04 675 1432	28/5/2014	<input type="checkbox"/>

Creating a mail merge is a two step process; the first step involves identifying the families you wish to receive the merge document, the second step involved writing the document you wish to send.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families List** icon



3. The Families List View screen will be displayed.
4. Click once on the **Find Marked** button displayed at the bottom right of the screen. This command will display a list of all families that are currently marked.
5. Click once on the **Unmarked Found Set** button. This will clear all settings for previously marked records.

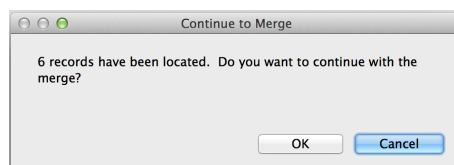


ID	Family Name	Contact Name	Address	Children	Discount	Telephone	Last Booking	Select for Merge
33	Taylor	Martha Taylor	79 Main St, Tawa, Wellington 4010	Georgia, Bruce, Denise	.05	04 236 9137	11/1/2015	<input type="checkbox"/>

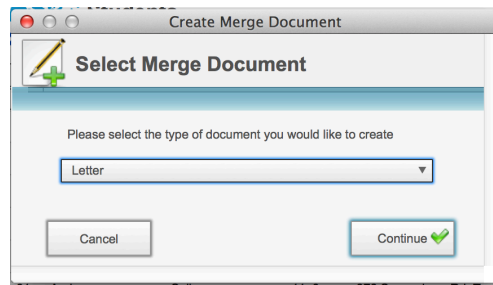
Displaying all (Total of 48)

Find Marked Unmark Found Set Mark Found Set

6. Use the **Finding a Family** function to locate the group of records you wish to send a message to.
7. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 4)
8. Click once on the **Mark Found Set** button to select the records for the mail merge. A cross should appear for each family in the Mark column on the right of the screen.
9. Repeat steps 4 to 6 above until all required families have been marked.
10. Select **Perform Mail Merge** from the Scripts menu.
11. A dialog will be displayed advising the number of records which have been selected for the mail merge. Click OK if this number is correct, or click Cancel to exit the script and begin again at step 1.



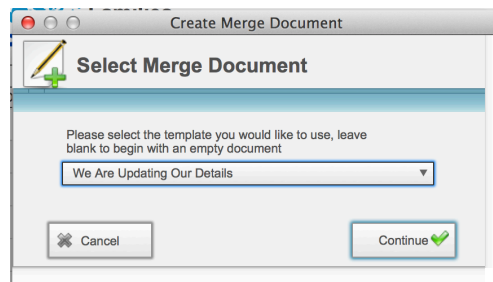
12. The **Create Merge Document** dialog will be displayed asking you to define the type of document you wish to create. Select the required type of document from the drop-down menu provided.



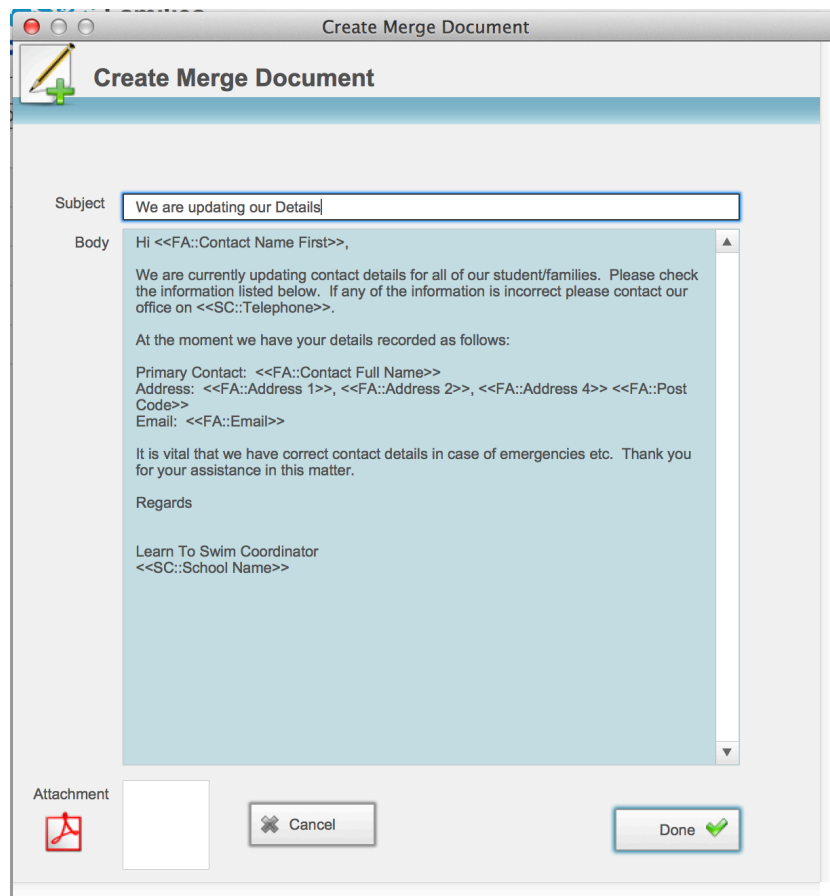
13. Click the **Continue** button.

14. The **Create Merge Document** dialog box will be displayed on your screen. Select the template you wish to use or click Use Blank Document

15. Click the **Continue** button.



16. The selected template will be displayed on your screen. Edit the content of the template as required.



17. Click the **Done** button to complete the merge or Cancel to exit the script with making a change.

**NB:** If Done was selected at step 17 a personalised document will be created for each family, it will automatically be printed or emailed. A copy of each document will be placed on the respective Family record.

## Importing Family Data

When you import data, you're bringing data from another file into Splash. When you import data into an existing FileMaker Pro file, you can:

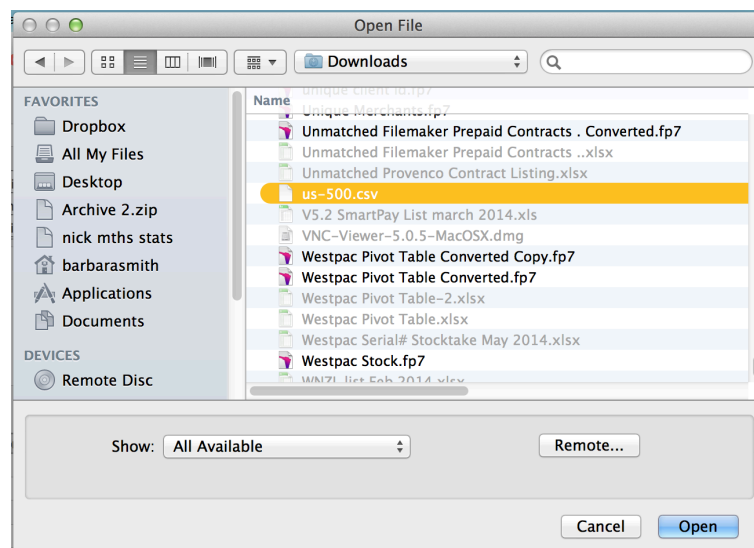
- add new records from the source file
- update records with information from the source file
- update matching records with information from the source file

### Importing Records from Excel

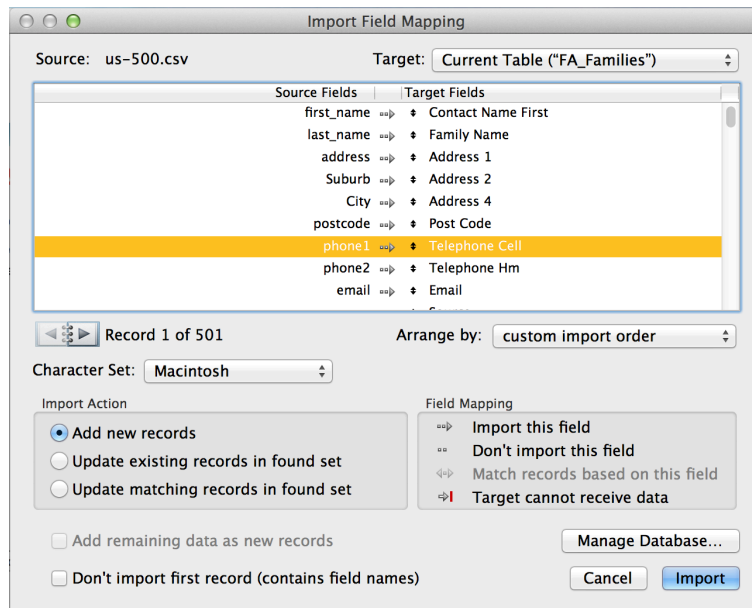
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families List** icon



3. The Families List View screen will be displayed.
4. Select **Import Family Data** from the **Scripts** menu.
5. The **Open File** dialog will be displayed on your screen.
6. Locate the file containing the data you wish to import and click the **Open** button.



7. The Import Field Mapping dialog will be displayed on your screen.



8. In the **Import Action** area, choose the type of import to perform.

To add new records to the end of the target file – select **Add New Records**



To update the found set of records in the target file with the records you're importing – select **Update existing records in found set**.

To update data in the target file with the data from matching records in the source – select **Update matching records in the found set**.

9. If the first record of the data you're importing contains field names (column headings) instead of data, select **Don't import first record (contains field names)**.

Selecting **Don't import first record (contains field names)** skips the first record during import.

10. Drag fields in the Target Field column to align with fields in the Source Field column to indicate where data will be imported or updated.

To align a field, move the pointer over the  icon next to a target field name in the list. When the pointer changes to a double arrow , drag the field to a new location.

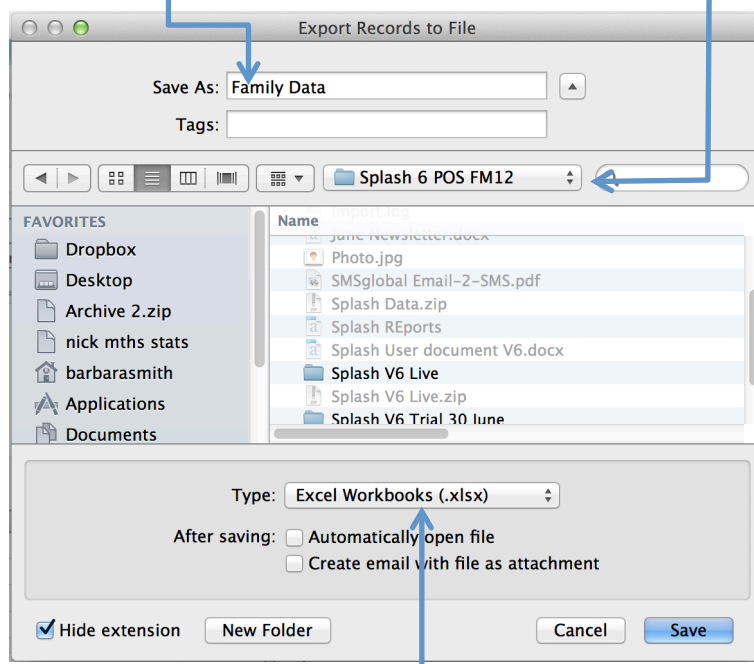
11. When all fields have been aligned correctly, click the **Import** button.

## Exporting Family Data

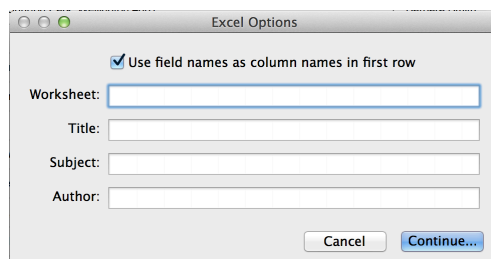
You can export Splash data to a new file and then open it in another application . For example, you can export Splash data as a spreadsheet for use in Microsoft Excel. Use the export function when you want to export records in the found set of records.

### Exporting Records to Excel

1. Use the **Finding a Family** function to locate the group of records you wish to export.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Export Family Data** from the **Scripts** menu.
4. The **Export Records to File** dialog will be displayed on your screen.
5. Enter the name you wish to call your file and choose a location to store the file.



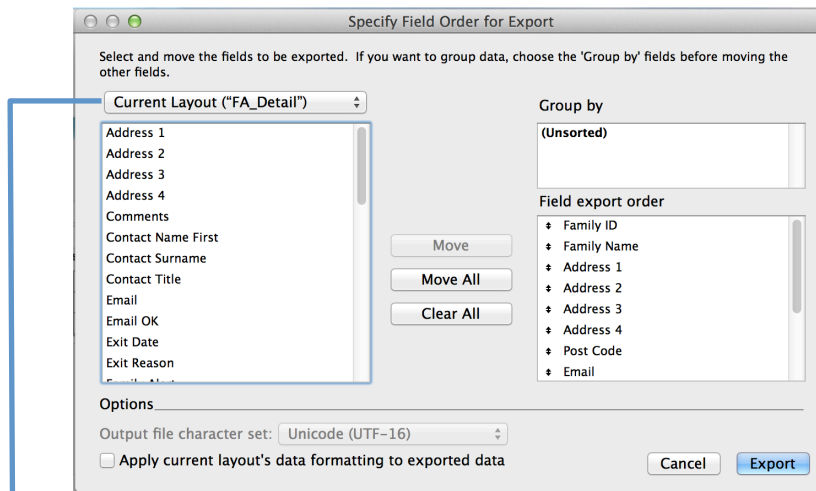
6. Choose a file type from the **Save as Type (Type)** field and click the **Save** button.
7. The Excel Options dialog box will be displayed on your screen. If you wish to name the worksheet the data is being exported to enter it in the Worksheet field. Click **Continue**.



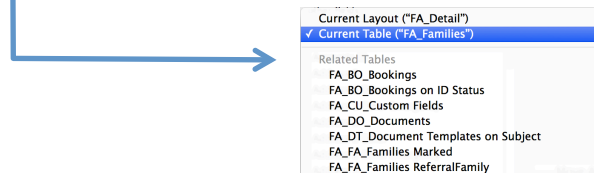
8. The **Specify Field Order for Export** dialog will be displayed on your screen. Use this dialog to indicate the order of the fields in which Splash will export the data.
9. All fields displayed in the **Field Export Order** list will be exported.



10.To move a field to the **Field Export Order** simply double-click the field name on the left of the screen.



11.To include a related field choose the name of the related table from the list in the upper left of the dialog, then double-click the required field.



12.When all the required fields are displayed in the Field Export Order list click the **Export** button.

13.The Excel file will be saved to your computer ready for use.

Family ID	Family Name	Address 1	Address 2	Address 3	Address 4	Post Code	Email	Telephone default	Contact
2	Smith	6A Eriestoke Crescent		Churton Park	Wellington	4001	barbaras@extra.co.nz	0272222082	Barbara
3	Smith	89 Roberta Road	Tawa		Wellington	4008	computerize@extra.co.nz	0272222082	Daniel
4	Anderson	876 Somewhere Rd	Tawa		Wellington	4010	computerize@extra.co.nz	09 897 5845	David
5	King	46 Brooklyn Rd	Brooklyn		Wellington	4008	computerize@extra.co.nz	05 678 4564	Nathan
6	McDougal	118 South St	Newlands		Wellington	4006	computerize@extra.co.nz	04 478 3156	Mary
7	Williams	171 Chapel St	Khandallah		Wellington	4005	computerize@extra.co.nz	04 477 8952	Malcolm

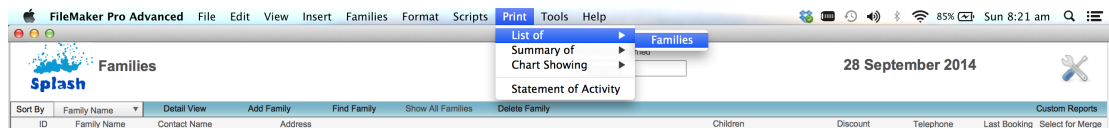
## Printing Family Reports

You must be in the Families module of Splash to generate the following reports. All reports are accessed from the Print menu.

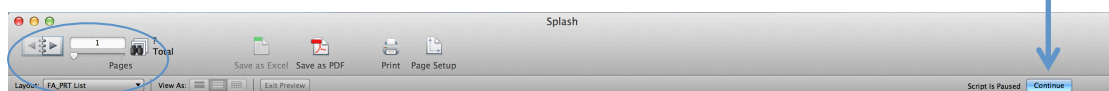
### Printing a List of Families

This report provides a listing of family ID, address and contact details, it should be printed and kept as a reference guide for making bookings.

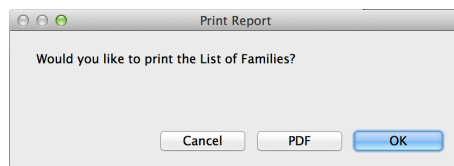
1. Use the **Finding a Family** function to locate the group of records you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **List of ...** from the Print menu and select **Families** from pop-out the menu displayed.



4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.



6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

## List of Families

Family Name and Contact

Students

ANDERSON	David	876 Somewhere Rd, Tawa, Wellington 4010	09 897 9845	3
APLIN	Sylvia	76 High St, Tawa, Wellington 4010	04 236 5981	3
APOLLO	Martha	78 Youngs Road, Tauranga 7902	756 7898	2
BEAUCHAMP	Russell			
BRADLEY	Patricia	943 Beach Parade, Tauranga 7902	765 4563	1
BROWN	Peter	234 any street, Wellington		1
BROWN	Sam	345 Nowhere St, Brooklyn, Wellington 4009	04 564 3212	4
BUCHANAN	Debbie	29 Victoria St, Khandallah, Wellington 4007	0272222082	2
CRANDLEY	Joanne	123 Any St, Wellington		1
FAIRBROTHER	Mark	56 Watt St, Tatahi Bay, Wellington 4012	04 789 4568	2
HARGREAVES	Susan	24 lane St, Wallaceville, Upper Hutt 5014	0272222082	2
HARPER	Edith	76 Colombo Road, Tawa, Wellington 4010	04 236 4567	2
HUGHSON	Ngaire	98 Barrett St, Ngaio, Wellington 4007	04 654 9524	2
JESSOP	Tony	180 Essex St, Ngaio, Wellington 4007	04 478 3215	3

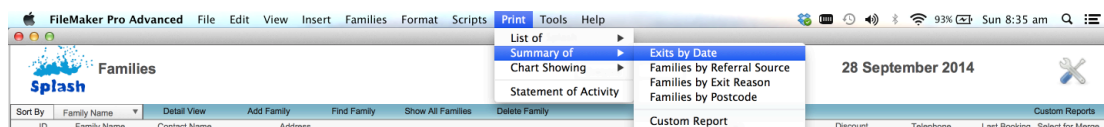
## Printing a Summary of Exits by Date

This report counts the number of families and the number of students who have exited the swim school.

1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families List** icon



3. The Families List View screen will be displayed.
4. Select **Summary of ...** from the Print menu and select **Exits by Date** from pop-out the menu displayed.



5. The Specify Date for Reporting dialog will be displayed on your screen. Enter the Start Date and End Date for the families to be included in your report.



Specify Dates for Reporting

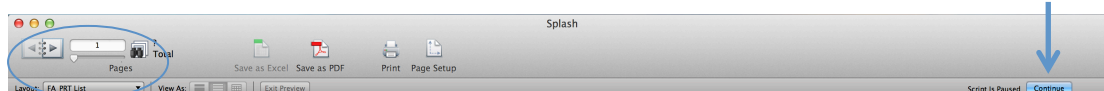
Please specify the start and end date for the reporting period.

Start Date  
1/1/2014

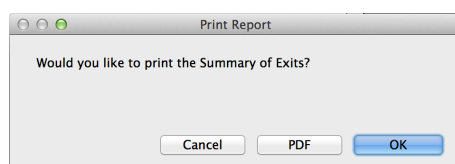
End Date  
30/6/14

Cancel OK

6. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



7. The **Print Report** dialog will be displayed on your screen.



Print Report

Would you like to print the Summary of Exits?

Cancel PDF OK

8. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Summary of Families		
Summary of Exits	Number of Families	Number of Students
Financial	1	3
Goals Met	2	2
Other Commitments	1	4

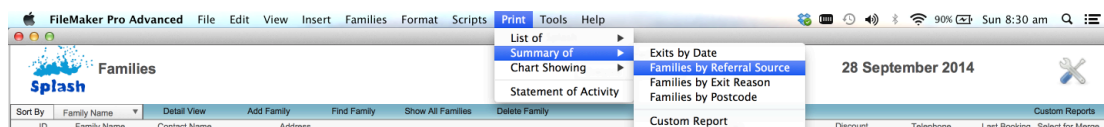
## Printing a Summary of Referral Source

This report counts the number of families and the number of students for each source of referral.

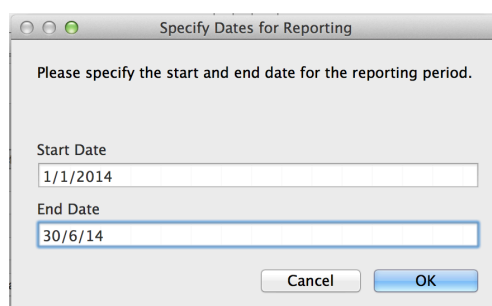
1. Click once on the **Splash** icon on the top left corner of your screen.
2. Select the **Families List** icon



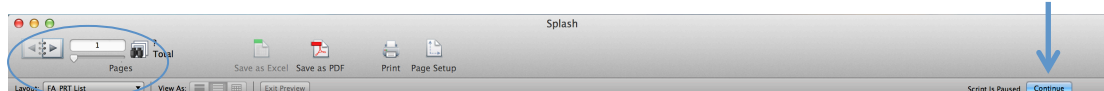
3. The Families List View screen will be displayed.
4. Select **Summary of ...** from the Print menu and select **Families by Referral Source** from pop-out the menu displayed.



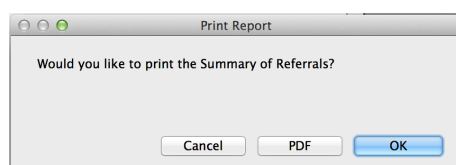
5. The Specify Date for Reporting dialog will be displayed on your screen. Enter the Start Date and End Date for the families to be included in your report.



6. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



7. The **Print Report** dialog will be displayed on your screen.



8. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

## Summary of Families

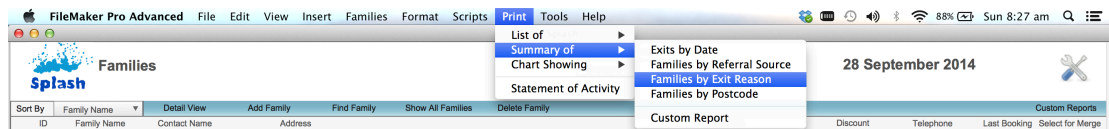
### Summary of Referrals

	Number of Families	Number of Students
Existing Client	7	13
Family	3	6
Local Newspaper	4	16
Preschool	2	4
School	9	22
Signage	12	26

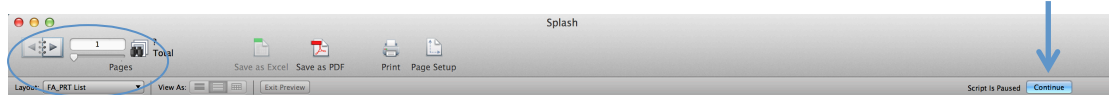
## Printing a Summary of Exit Reasons

This report counts the number of families and the number of students who have exited the swim school.

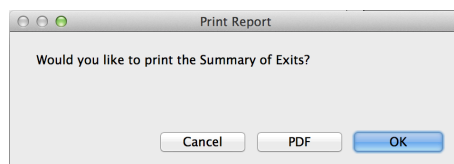
1. Use the **Finding a Family** function to locate the group of exited families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Families by Exit Reason** from pop-out the menu displayed.



4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.



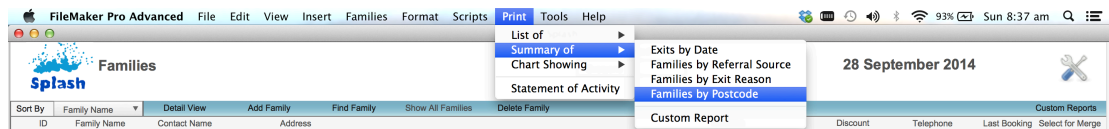
6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Summary of Families		
Summary of Exits	Number of Families	Number of Students
Financial	1	3
Goals Met	2	2
Other Commitments	1	4

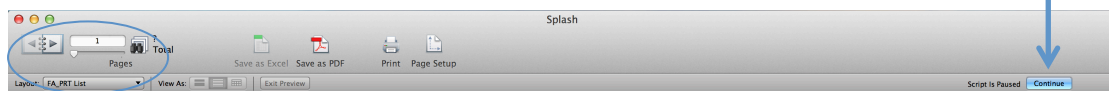
## Printing a Summary of Postcodes

This report counts the number of families and the number of students for each postcode.

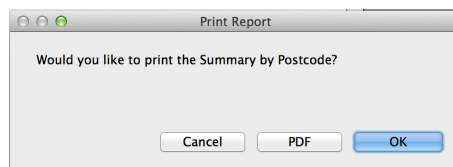
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Summary of ...** from the Print menu and select **Families by Postcode** from pop-out the menu displayed.



4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.



6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

Summary of Families		
Summary by Postcode		
	Number of Families	Number of Students
PC = :4000	1	1
PC = :4001	4	9
PC = :4002	1	3
PC = :4005	2	6
PC = :4006	1	3
PC = :4007	4	9
PC = :4008	6	16
PC = :4009	1	4
PC = :4010	7	17
PC = :4012	1	2
PC = :5014	1	2

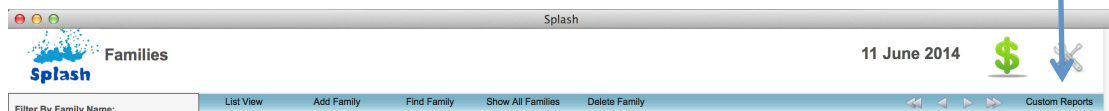


## Printing a Custom Report

In addition to the generic family reports, Splash provides custom report writing. Custom reports are specific reports layouts where you can change the grouping for summary totals.

### Displaying the Custom Report Dialog

1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Click once on the Custom Report button displayed in the blue stripe at the top of your screen.



1. The report writer will be displayed on your screen.

A screenshot of the 'Produce Summary Report' dialog box. The title bar says 'Produce Summary Report'. The main title is 'Specify Report Format'. The dialog is divided into four steps:  
**Step 1: Choose Existing Report Format**  
Report Name: Summary by Referral Source (dropdown menu)  
**Step 2: Choose/Update Report Summary Groups**  
Group 1: Summarize by Referred From (dropdown menu)  
Group 2: (dropdown menu)  
Group 3: (dropdown menu)  
Show Detail: ☒  
**Step 3: Enter Report Title**  
Report Title: Summary by Referral Source (text field)  
**Step 4: Produce Report**  
OK (button with green checkmark)  
Cancel (button with red X)

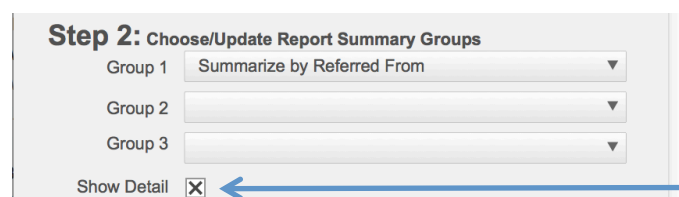
## Defining a Custom Report

The custom report dialog is divided into three steps. When you have completed each of the three sections you are ready to generate your report. Create your custom report by completing the steps outlined below:

1. Choose the Report Type
2. Choose the Reporting Groups.
3. Give your report a title.

The three fields displayed at **Step 2** are used to define how the information in your report will be structured. Summary totals will be displayed for each group you have defined at levels one, two and three.

If you wish to include detailed information about each family in your report, click the **Show Detail** button.



### Custom Report Sample (No Detail)

The sample report below demonstrates the use of summary levels. Show Detail was left blank when the report was created.

Summary of Families		
Summary by Referral Source		
	Number of Families	Number of Students
Existing Client	8	16
Family	4	7
Local Newspaper	4	16
Preschool	2	4
School	9	22
Signage	19	29
Television	1	1

### Custom Report Sample (Show Detail)

Information in the report below has been grouped by the same categories, however this time **Show Detail** has been selected.

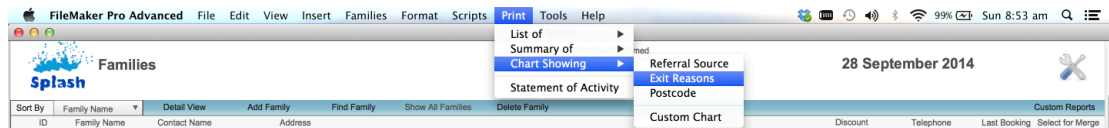
Summary of Families		
Summary by Referral Source		
	Number of Families	Number of Students
Existing Client	8	16
JESSOP	180 Essex St, Ngaio, Wellington 4007	04 478 3215
MCARTHUR	39 River Road, Kelson, Wellington 4008	04 566 7894
MORRISON	8 Victoria St, Redwood, Wellington 4010	04 237 8536
PEARSON	456 Any St, Wellington 4000	04 477 6543
RIM	322 New Horizon Blvd, Johnsonville, Wellington 4000	027 543 2287
SMITH	89 Roberta Road, Tawa 4008	0272222082



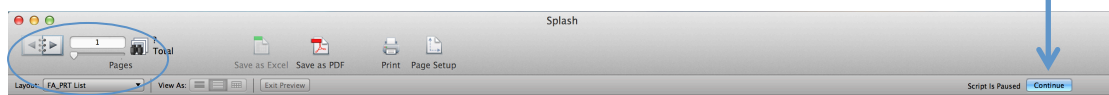
## Printing a Chart

### Printing a Chart Showing Families by Referral Source

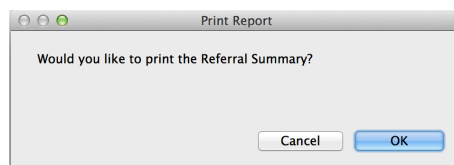
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Referral Source** from pop-out the menu displayed.



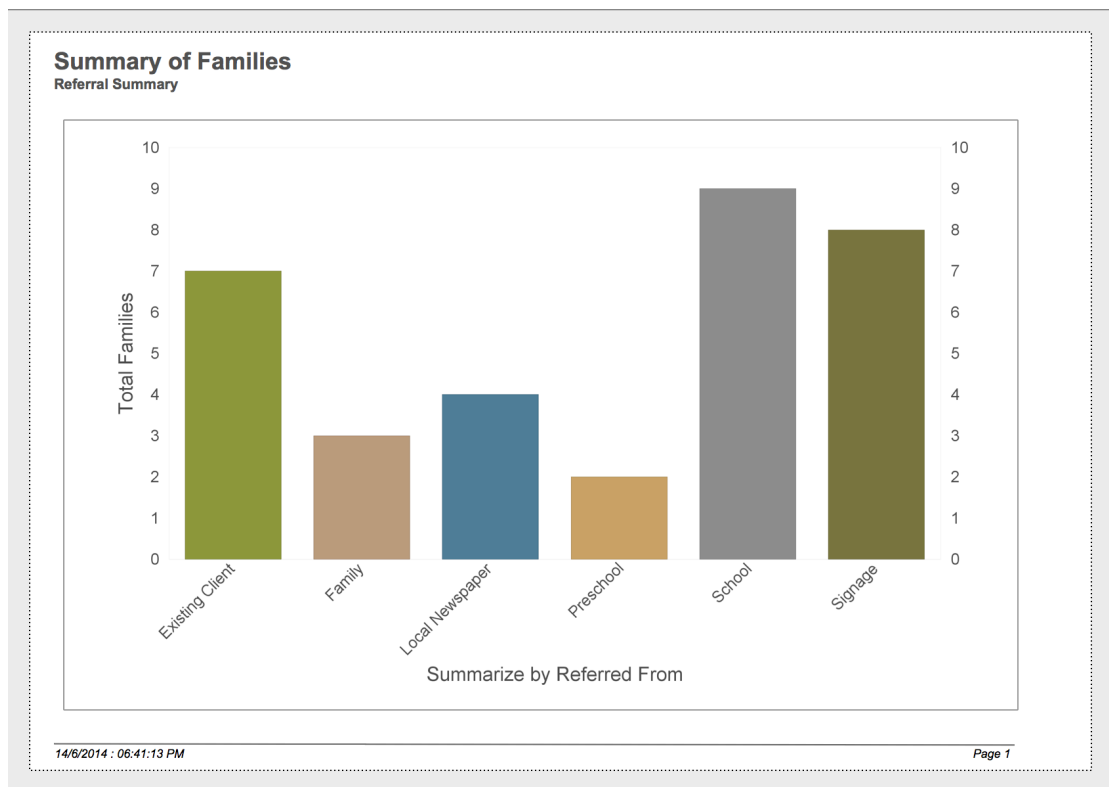
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.

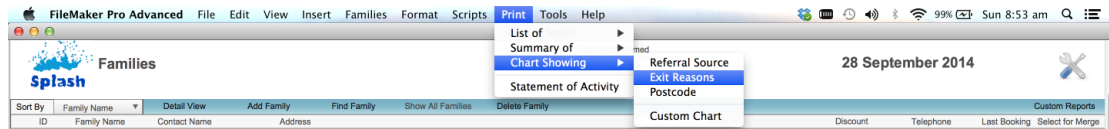


6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

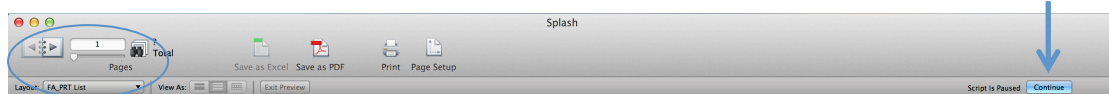


## Printing a Chart Showing Families by Exit Reason

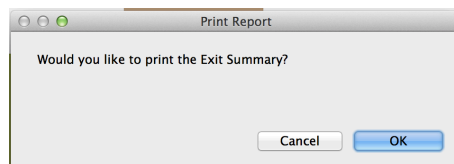
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Exit Reason** from pop-out the menu displayed.



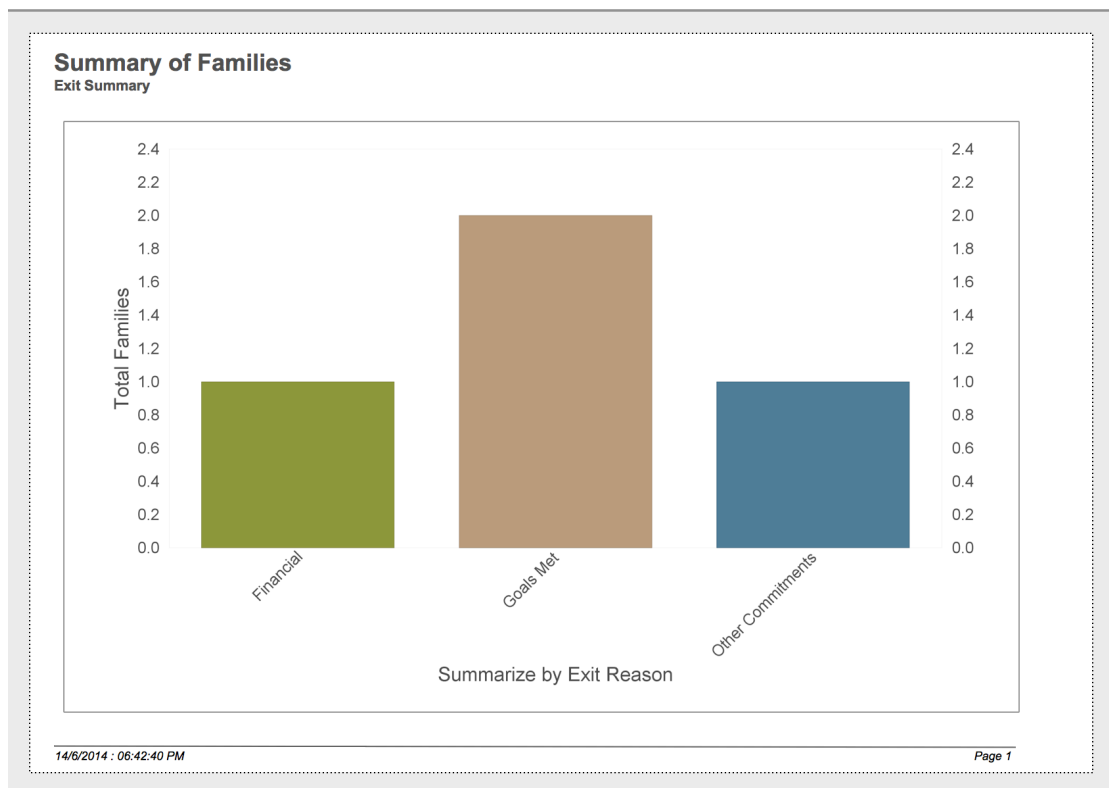
4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.

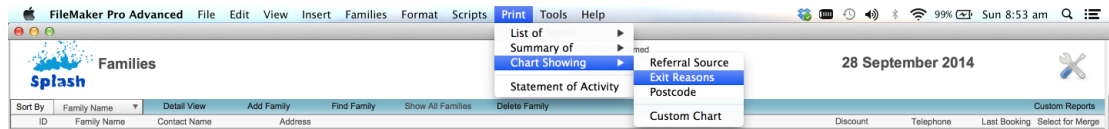


6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.

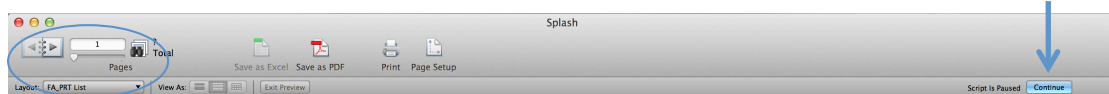


### Printing a Chart Showing Families by Postcode

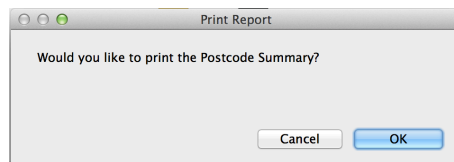
1. Use the **Finding a Family** function to locate the group of families you wish to include in your report.
2. The found set of records will be displayed in a list on your screen. (if the list is incorrect repeat step 1)
3. Select **Chart Showing ...** from the Print menu and select **Postcode** from pop-out the menu displayed.



4. The report will be previewed on your screen. The status panel (at the top of the screen) lets you view other pages. When you have finished viewing the report click the **Continue** button on the status panel (or press ENTER).



5. The **Print Report** dialog will be displayed on your screen.



6. Click **OK** to print the report, **PDF** to save the report as a PDF, or **Cancel** to return to your original screen without printing.