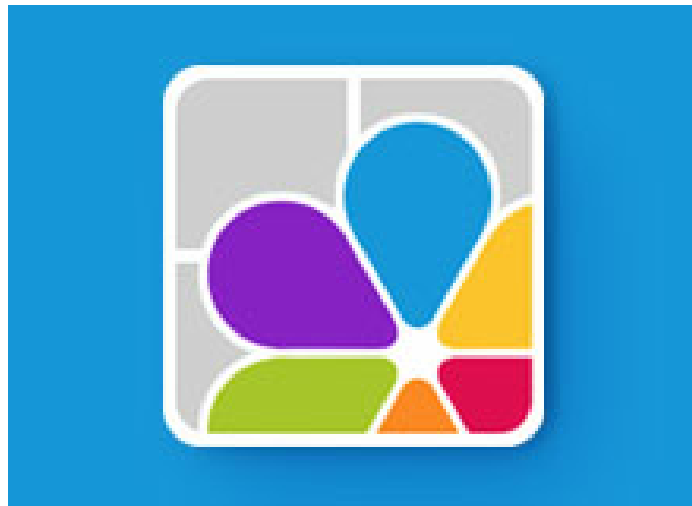


Childcare Manager Getting Started Guide

version 10.1.6483



Childcare Manager 10.1.6273

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Everything you need
in one central location.

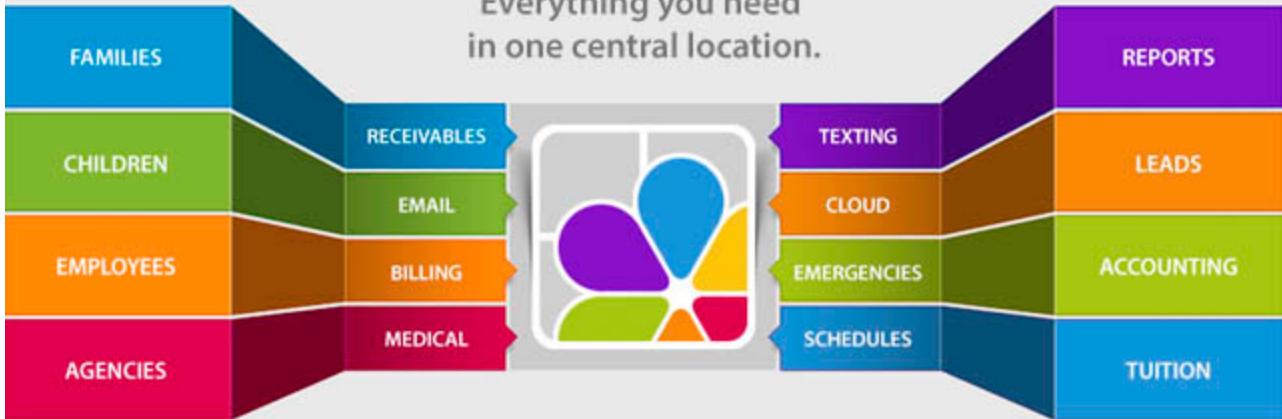


Table of Contents

Introduction	5
Part I Install and Register Childcare Manager	6
Part II Create a New Center	7
Part III Navigating Childcare Manager	8
Part IV Entering Information into Your Center	10
Part V Classroom and Program Lists	12
Part VI Schedules, Attendance and Timesheets	14
Part VII Billing and Receiving	19
Part VIII Report Center	27
Part IX Additional Features	30

Introduction

Welcome to Childcare Manager, the premier and easy to use program designed to help you manage your childcare facility. Childcare Manager simplifies the process of running your childcare facility by organizing all of your important information in one place. This guide will explain how to create and setup a new center and then use the basic functions you need to run your childcare facility.

If at any time you need a more in-depth explanation on something, or you just want to learn more about the program, you can visit the in-program help by pressing F1 or clicking the help button. We also offer a free support program for our first year customers, which includes phone and email support as well as scheduled phone training. All of our contact information and pricing for future support is available on our website Childcaremanager.com.

1 Install and Register Childcare Manager

Childcare Manager runs on the Microsoft Windows ® operating system and currently supports all editions of Windows Vista, Windows 7, Windows 8.1, and Windows 10.

After you purchase Childcare Manager, you should receive an e-mail from your salesperson. In the e-mail, you will find a serial number and link to a website.

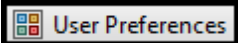
To install Childcare Manager:

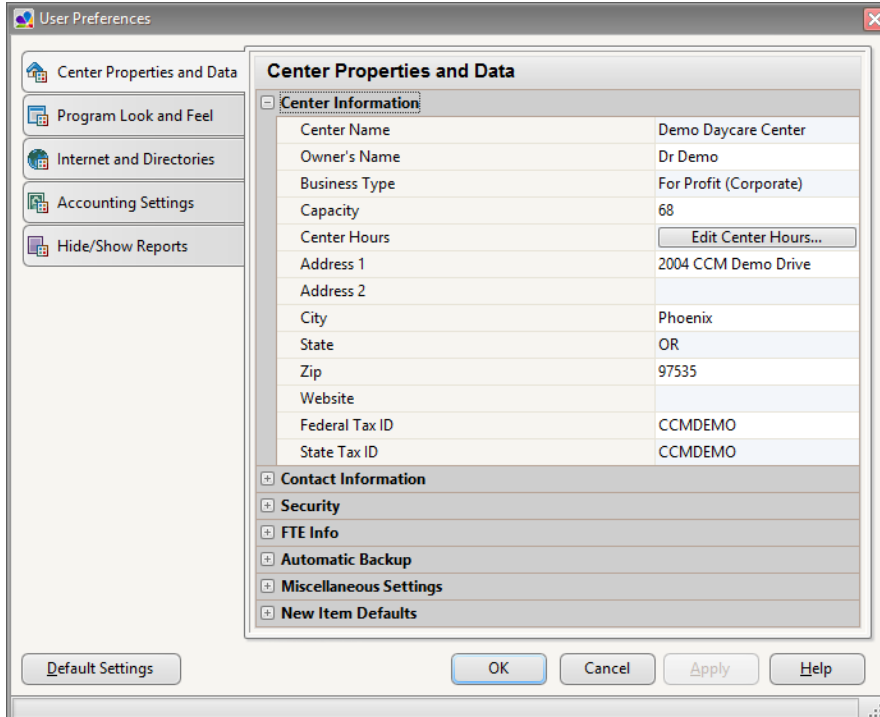
1. Open the e-mail and click the website link.
 - a. You can also visit Childcaremanager.com, hover over the **Support** menu and select **Downloads**.
2. Enter your serial number in the **Serial Number** box.
3. Download the latest version of Childcare Manager and **Run** the setup.
 - a. If you are missing any necessary software to run Childcare Manager, a window will appear asking if you want to download these updates. Click **OK**.
4. Follow the instructions in the Childcare Manager 10.1- Install Shield Wizard window.
5. After Childcare Manager is installed the Childcare Manager Registration window will open.
 - a. Choose either the **Preview** option or the **Purchased** option and click **Next**.
6. If you choose the **Preview** option you will be allowed to use the **Demo Daycare** account:
 - a. The **Demo Daycare** account is a great way to not only demo Childcare Manager, but also practice using many of the functions Childcare Manager offers.
 - b. The **Demo Daycare** account can be used for an unlimited amount of time, but each time you reopen the account the dates are reset.
7. If you choose the **Purchased** option you will open the User Account Control window:
 - a. The **Demo Daycare** account is also available in the **Purchased** option.
8. Click **Yes** and enter your serial number in the **Serial Number** box in order to register your copy of Childcare Manager.
9. Follow the remaining steps in the Childcare Manager Registration window and click **Finish**.
 - a. If you want to register your version of Childcare Manager at a later date, you can select the **Register** option in the **Help** menu.
10. Congratulations you have successfully installed Childcare Manager.

Please note that if you are installing a Multi-User version of Childcare Manager, the installation process is the same.

2 Create a New Center

Now that you have installed and registered Childcare Manager, it is time to create and setup your center.

1. Select **New Center** from the **File** menu.
2. In the Center Wizard window enter your information:
 - a. You only need to add a **Center Name** to create a new center.
3. Click the  button and select the **Center Properties and Data** tab.
4. Click the **Center Information** toggle:
 - a. This section includes more detailed information than the Center Wizard window. It is best to fill out as much information as possible in the beginning so you don't have to go back and do it later. Don't forget to add your tax ID numbers, so your parents have the information they need for year-end tax preparation.
5. For further customization fill out the information in the **Contact Information** toggle.
6. Finally, make sure to create a backup of your center on a USB drive or other external source.
 - a. Childcare Manager offers an online solution to make sure your data is safe and up to date. For more information on CCM Online Backup, you can contact our [customer service](#) or visit the [Childcare Manager Online](#) website.



The screenshot shows the 'User Preferences' dialog box with the 'Center Properties and Data' tab selected. The 'Center Information' section is expanded, showing the following fields:

Field	Value
Center Name	Demo Daycare Center
Owner's Name	Dr Demo
Business Type	For Profit (Corporate)
Capacity	68
Center Hours	<input type="button" value="Edit Center Hours..."/>
Address 1	2004 CCM Demo Drive
Address 2	
City	Phoenix
State	OR
Zip	97535
Website	
Federal Tax ID	CCMDEMO
State Tax ID	CCMDEMO

The following sections are collapsed:

- Contact Information
- Security
- FTE Info
- Automatic Backup
- Miscellaneous Settings
- New Item Defaults

Buttons at the bottom: Default Settings, OK, Cancel, Apply, Help.

3 Navigating Childcare Manager

Childcare Manager is divided into one general center called **My Center**, and seven specific centers. **My Center** gives you general information about your childcare facility, and it is also the start window for Childcare Manager. The seven other centers give you specific information about each aspect of your childcare facility. Each center follows a common format, which reduces the time to learn Childcare Manager and simplifies using the program.

The common features found in most centers are highlighted in the figure below.

The screenshot displays the Childcare Manager software interface. The window title is "Childcare Manager - Demo Daycare Center". The menu bar includes "File", "Options", "Lists", "Family", "Child", "Accounting", "Employee", "Other Payer", "Reports", "Leads", and "Help". The "Centers Bar" contains icons for "My Center", "Family Center", "Child Center", "Accounting", "Employee", "Other Payer", "Report Center", "Lead Center", "RapidTuition", and "Emergency". The "Names List" (7) is a table with columns for "Family" and "Balance". The "Tasks List" (8) includes "Parent Portal", "Notes", "Contacts", "RapidTuition Family Enroll...", "Contract Charges", "Batch Bill...", "Batch Email...", "Receive Payments...", "Make Deposits...", "Receivables", and "Send Group Text Message...". The "Reports List" (9) includes "Family Reports", "Accounting (Income)", "Family Information", and "Leads". The "Family QuickView" (4) shows details for "Anderson, Sandy" and "Anderson, Mike". The "Family Receivables" table (5) has columns for "User", "Date", "Comment", "Item", "Child", "Charged", "Paid", and "Balance". The "Quick Bar" (6) is at the bottom left, "Configure Buttons" (10) are in the bottom center, and the "Status Bar" (11) is at the bottom right.

1- Title Bar displays the name of your program and the name of the center that is open.

2- Menu Bar contains multiple drop-down menus that provide access to all of your program information, transactions, tasks and reports. Most items found in the **Menu Bar** are accessible through the centers. The primary exceptions are items in the **File** menu and the **Help** menu.

3- Centers Bar provides you with access to each center. The **Centers Bar** also includes an **Emergency** button that can be used to printout a roll-call sheet for fire drills and other emergencies.

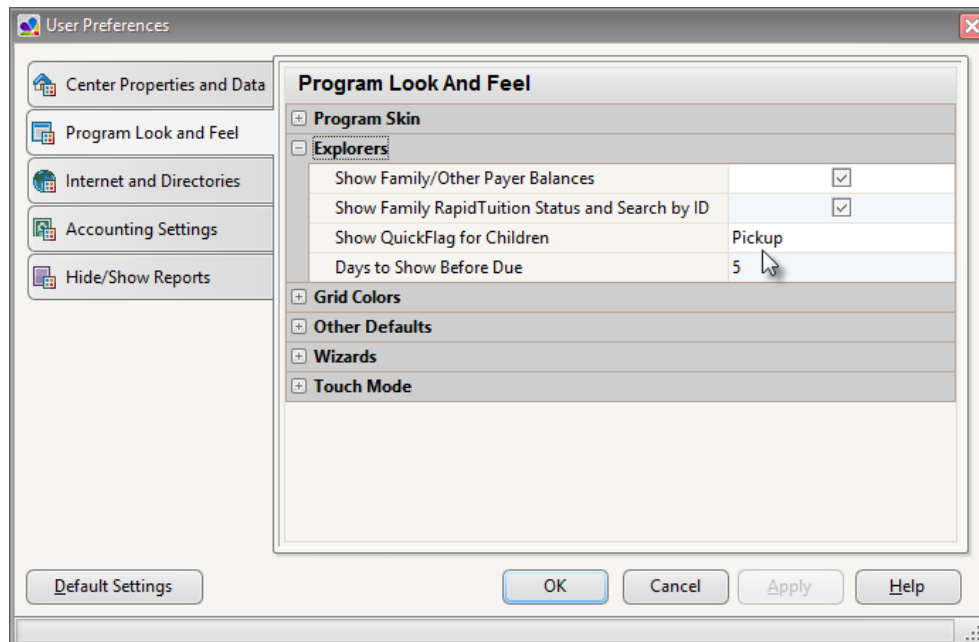
4- QuickView provides you with important information about the individual, agency or account highlighted in the **Names List**. More detailed information about the individual, agency or account is located in their data card.

- a. Data cards are accessed by double clicking on the name in the **Names List** or the name in the **QuickView**, or by clicking the edit button on the **QuickView** toolbar.

5- Work Area displays the accounting journals and several other working screens including contacts, notes, schedules, and attendance records.

6- Quick Bar lets you access the **Names List**, **Tasks List** and **Reports List**.

7- Names List is a list of all the families, children, accounts, employees and other payers for the open center. In addition, the family and other payer lists provide an account balance for each family and other payer listed. The child list provides an immunization icon for each child with an overdue shot. An option is available in User Preferences that allows you to remove this icon or to replace it with one of the other three **QuickFlag** icons (Allergies, Pickup or Medical).



8- Tasks List is a list of tasks for the open center.

9- Reports List is a list of report categories for the open center. When you click a category, a list of reports in that category are displayed under the **Names List**. To run a report, double click on it.

10- Configure Buttons is a pop-up menu that gives you the option to add or remove tasks from the **Tasks List** or reports from the **Reports List**. The **Reports List** is hidden by default.

11- Status Bar displays a variety of useful information within the program including:

- a help message on the far left that describes the function your mouse is hovering over.
- the initials of the logged in user in the **User** field . When no one is logged in the letters N/A (none available) are displayed.
- the date of your last backup in the **Last Backup** field.
- a display that tells whether or not the list you are viewing is filtered.
- a count of the names in the **Names Lists** of the open center.

4 Entering Information into Your Center

Childcare Manager makes it easy to enter important information about the people and the finances involved with your childcare facility. For the most part it is as simple as filling in a form.

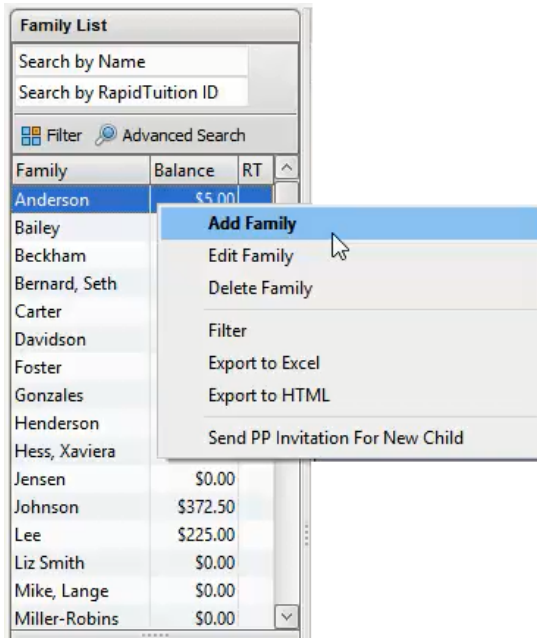
Above is a screen-shot of the Family Data window, which is where you enter information about a child's sponsors. The Family Data window is similar to the Child Data, Employee Data, Other Payer, Family Contacts and Lead Information windows. Each window contains important fields, where you fill out the necessary information about the individual. The more information the better, but in most cases you can add someone into your database with just a name and a status. Although entering information is often a simple process, the rest of this section will focus on some guidelines and tips that will help you along the way.

Guidelines and Tips:

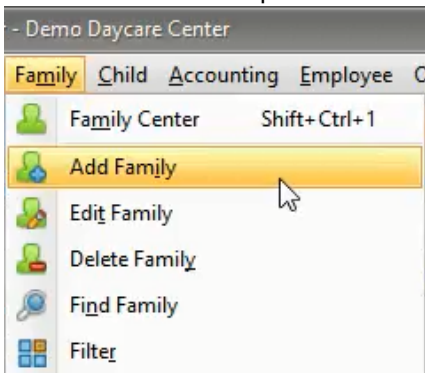
1. There are three simple ways to add someone into your database:
 - a. Click the **Add** button in the **QuickView**.

Child	Primary Classroom	Age	Allergies	Physical	Pickup	Shots	Status
Joyce Anderson	Butterflies	8 yrs 11 mos					Active
Michael Anderson	School Kids Club	15 yrs 1 mo					Active

- b. Go into the **Names List**, right click and choose the **Add** option.



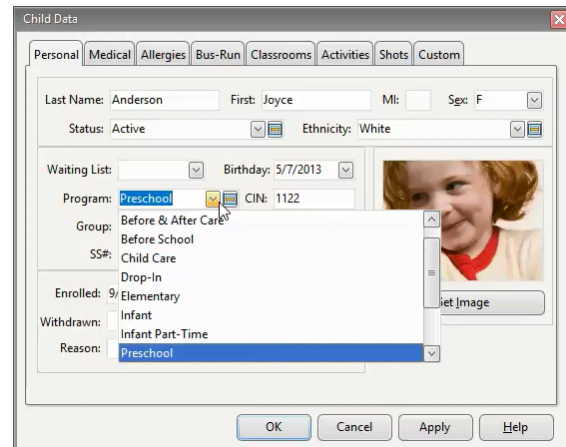
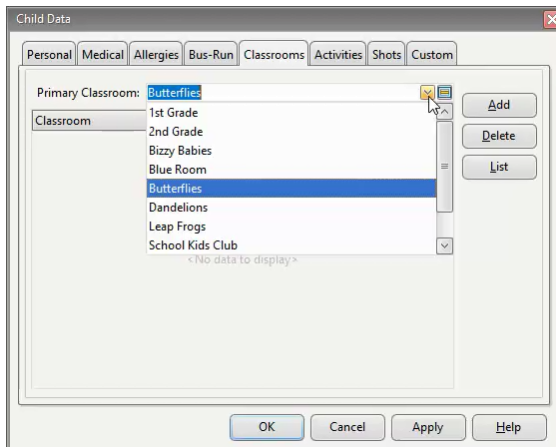
c. Select the **Add** option from the Center's **Menu Bar**.



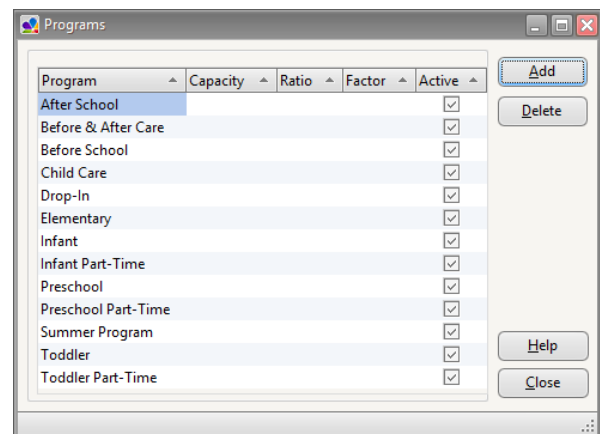
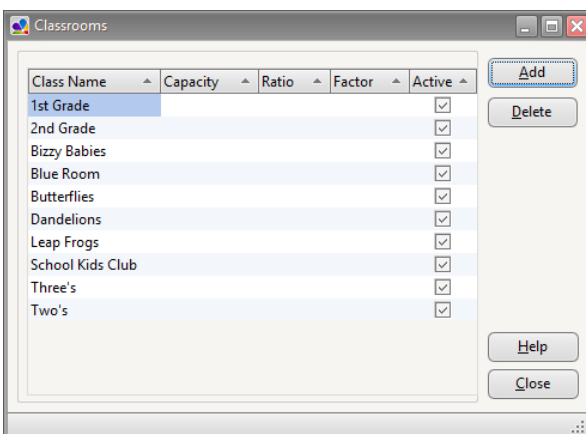
2. Once you have added someone into your database you can edit their information by highlighting their name in the **Names List** and selecting the **Edit** option.
 - a. The **Edit** options are available in the same places as the **Add** options.
3. In many of the information windows, you will find **Custom Field Buttons**. These buttons open a customize window where you can add your own fields to the existing drop down list.
 - a. Childcare Manager comes with numerous default fields for each drop down list.
4. Before you can **Add** a child into the **Child Center** you must **Add** their parent or **Primary Sponsor** into the **Family Center**.
5. When you are **Adding** or **Editing** information in the Information window, if you click **Apply** that saves the current information and lets you continue to **Add** or **Edit**. If you click **OK** that saves the information and closes the window.
6. If at any time you have question about the current Information window, click the **Help** button at the bottom right.

5 Classroom and Program Lists

When you add a child into your center, you will want to assign them to a specific class or program. This way you can run specialized reports as well as keep track of attendance, billing and so much more. Childcare Manager has numerous classrooms and programs set up by default, but you may want to change those lists in order to match the specific criteria and names of classrooms and programs in your school.



The **Classrooms Lists** and **Programs Lists** are set up the same way, so if you learn how to use one list, then you will be able to use the other.



To Add a Classroom/ Program:

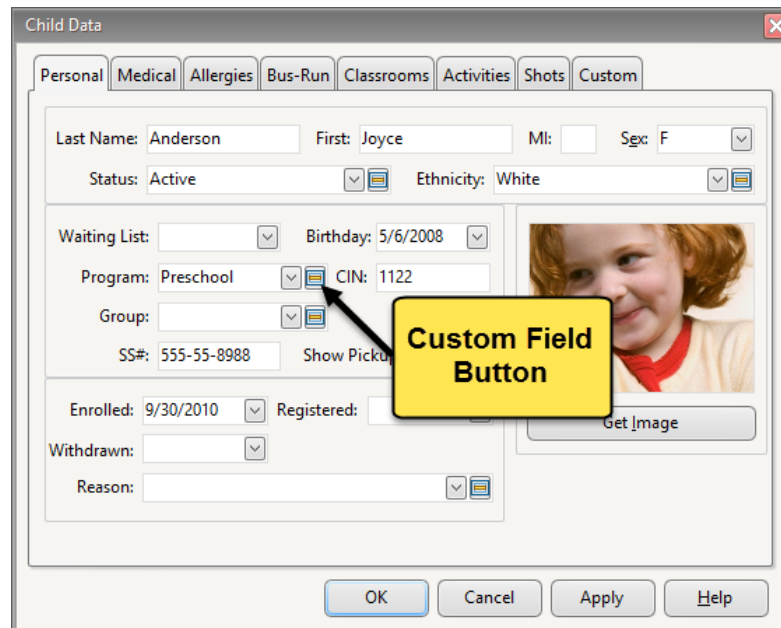
1. Click **Lists** in the **Menu Bar**.
2. Select **Classrooms/ Programs**.
3. Click **Add** and fill out the remaining columns:
 - a. **Class/ Program Name**: The name of the classroom or program.
 - b. **Capacity**: The maximum number of children allowed in a classroom or program.
 - c. **Ratio**: The maximum number of students per one teacher in that classroom or program.
 - d. **Factor**: Number used to determine the FTE of your childcare facility.

Only the **Class/ Program Name** must be filled out. All other fields are optional.

To Edit/ Delete a Classroom/ Program:

1. Click **Lists** in the **Menu Bar**.
 2. Select **Classrooms/ Programs**.
 3. Highlight the appropriate **Classroom/ Program**
 4. **Edit** the information in the necessary column
- OR**
5. Click **Delete** and then **OK** in the Delete window.

You can also access the Classrooms window and Programs window by pressing the **Custom Field** button next to the **Classroom** or **Program** drop down list in the Child Data window.



The screenshot shows the 'Child Data' window with several tabs: Personal, Medical, Allergies, Bus-Run, Classrooms, Activities, Shots, and Custom. The 'Personal' tab is active. The form contains the following fields:

- Last Name: Anderson
- First: Joyce
- MI: [empty]
- Sex: F
- Status: Active
- Ethnicity: White
- Waiting List: [empty]
- Birthdate: 5/6/2008
- Program: Preschool
- CIN: 1122
- Group: [empty]
- SS#: 555-55-8988
- Show Pickups: [empty]
- Enrolled: 9/30/2010
- Registered: [empty]
- Withdrawn: [empty]
- Reason: [empty]

A yellow callout box with the text 'Custom Field Button' and an arrow points to the small icon next to the 'Program' dropdown menu. A photo of a young child is visible on the right side of the form.

6 Schedules, Attendance and Timesheets

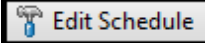
A crucial aspect of running a childcare facility is time management, and with Childcare Manager it is easy to keep track of schedules, attendance and timesheets.

Schedules

The **Schedules** task is found in the **Child, Employee** and **Lead Centers**. The organization of the task is the same for the **Child** and **Employee Centers**, but in the **Lead Center** the **Schedules** task is catered more for a lead.

Employee Schedules - Ashby, Gloria						
Previous Month Next Month Edit Schedule Help						
April 2017						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3 7:00a-11:00a 12:00p-4:00p	4 7:00a-11:00a 12:00p-4:00p	5 7:00a-11:00a 12:00p-4:00p	6 7:00a-11:00a 12:00p-4:00p	7 7:00a-11:00a 12:00p-4:00p	8
9	10 7:00a-11:00a 12:00p-4:00p	11 7:00a-11:00a 12:00p-4:00p	12 7:00a-11:00a 12:00p-4:00p	13 7:00a-11:00a 12:00p-4:00p	14 7:00a-11:00a 12:00p-4:00p	15
16	17 7:00a-11:00a 12:00p-4:00p	18 7:00a-11:00a 12:00p-4:00p	19 7:00a-11:00a 12:00p-4:00p	20 7:00a-11:00a 12:00p-4:00p	21 7:00a-11:00a 12:00p-4:00p	22
23	24 7:00a-11:00a 12:00p-4:00p	25 7:00a-11:00a 12:00p-4:00p	26 7:00a-11:00a 12:00p-4:00p	27 7:00a-11:00a 12:00p-4:00p	28 7:00a-11:00a 12:00p-4:00p	29
30						

To **Create/ Edit** a schedule in the **Child** and **Employee Centers**:

1. Open the **Child** or **Employee Center**.
2. Select the **Schedules** task from the **Tasks Bar**.
3. Highlight the child or employee whose schedule you want to create/ edit.
4. Click the  **Edit Schedule** button at the top of the **Work Area**.
5. Fill out the Weekly Schedule window:
 - a. Select the week from the drop down calendar.
 - b. Click **Create New Week**.
 - c. Either enter the week in manually or you can load a weekly schedule template:
 - i. To enter the week manually:
 1. Highlight the day
 2. then enter the time, or use the scroll wheel on your mouse.
 - a. With two separate **IN** and **OUT** fields, you can factor break time into your schedule.
 - ii. To load a weekly schedule template:
 1. Click the **Load Template** button.
 2. Highlight the appropriate template.

3. Click **OK**.

6. To save your new schedule click **OK**.

To Create/ Edit a Schedule Template:

1. Click **Lists** in the **Menu Bar**.

2. Select the **Schedule Templates** option.

3. To **Edit** a template highlight the template and click **Details**.

4. To **Add** a template click **Add**.

5. Fill out the Weekly Schedule window.

6. Click **OK**.

For more information on child and employee schedules, including how to add multiple schedules to one employee or child, please visit **Employee Tasks-Schedules** and **Child Tasks-Schedules** in the Help manual.

The schedule in the **Lead Center** is designed to set up individual events, instead of an ongoing weekly schedule. This helps you manage tours, phone calls and meetings with your various leads. The **Schedules** task in the **Lead Center** could also be used for your very own personal date book. You can set up reminders, add locations to the event and even add extra notes.

The screenshot displays the 'Lead Schedule' window. At the top, there is a toolbar with icons for 'View', 'New Event', 'Edit Event', 'Delete Event', 'Email Event', 'Schedule Tour', and 'Mark Tour'. Below the toolbar is a calendar grid for the week of May 1st to 5th, 2017. The grid is organized by day and time slots. Events are shown as colored blocks: a blue block for 'Phone Call' at 8:00 on Monday; a blue block for 'Parent-Teacher' at 10:00 on Monday; a green block for 'Tour for Brock, Francis (Here)' from 8:00 to 12:00 on Tuesday; a large blue block for 'Administration Meetings' from 8:00 to 12:00 on Wednesday; a green block for 'Tour for Bray, Charde (Here)' from 8:00 to 12:00 on Thursday; and a green block for 'Tour for Bray, Charde (Here)' from 10:00 to 12:00 on Friday. On the right side, there is a calendar navigation panel for May 2017, showing a grid of dates and a 'Task reminder' checkbox.

To create/ edit an event in the **Lead Center**:

1. Open the **Lead Center**.

2. Select the **Schedule** task in the **Tasks Bar**.

3. Highlight the lead whose event you want to create/ edit.

4. To schedule a new event click the **New Event** button at the top of the **Work Area**.

5. To edit an event click the event in the **Work Area** and then click the **Edit Event** button.

6. Fill out the Event window.
 - a. To create an ongoing event, click the **Recurrence** button.

For more information on lead schedules, including recurring events, please visit **Lead Tasks-Schedule** in the Help manual.

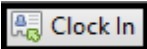
Attendance

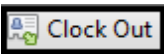
There are two ways to take attendance in Childcare Manager. You can take individual attendance or batch attendance for multiple children.

Child Attendance - Anderson, Joyce						
Previous Month Next Month Attendance Details Timesheet Clock In Clock Out						Help
April 2017						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3 09:00a - 05:00p	4	5 09:00a - 05:00p	6	7 08:00a - 04:00p	8
9	10 09:00a - 05:00p	11	12 10:00a - 05:00p	13	14 09:00a - 05:00p	15
16	17 08:00a - 05:00p	18	19 09:00a - 05:00p	20	21 09:00a - 05:00p	22
23	24 09:30a - 05:00p	25	26 07:00a - 03:00p	27	28 09:00a	29
30						

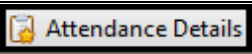
To take individual attendance:

1. Open the **Child Center**.
2. Select the **Attendance** task in the **Tasks Bar**.
3. Highlight the child for whom you want to take attendance.

4. When the child arrives, click the  button at the top of the **Work Area**.

5. When the child leaves, click the  button at the top of the **Work Area**.

To manually enter or edit the clock in or clock out time:

1. Click the  button.
2. To add a new attendance record click **Add**.

3. To edit an attendance record, highlight the record and click **Edit**.
4. Fill out the Time Entry window and click **OK**.

To take attendance for multiple children:

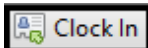
1. Open the **Child Center**.
2. Select the **Batch Attendance** task from the **Task Bar**.
3. Fill out the Batch Attendance window.
 - a. The **Filters** button opens the Child Filters window where you can filter the **Batch Attendance** list by status, program, classroom and many more.
4. Click **OK**.

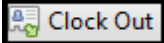
Timesheets

The **Timesheets** task for employees is very similar to the **Attendance** task for children. If you are confident using the **Attendance** task, then the **Timesheets** task should be no problem.


Employee Time Sheets - Ashby, Gloria							
Previous Month		Next Month		Time Card Details	Clock In	Clock Out	Help
April 2017							
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
						1	
2	3 09:00a - 05:00p	4 10:00a - 04:00p	5 09:00a - 05:00p	6 10:00a - 04:00p	7 10:00a - 02:00p	8	
9	10 09:00a - 05:00p	11 10:00a - 04:00p	12 09:00a - 05:00p	13 10:00a - 04:00p	14 10:00a - 02:00p	15	
16	17 09:00a - 05:00p	18 10:00a - 04:00p	19 09:00a - 05:00p	20 10:00a - 04:00p	21 10:00a - 02:00p	22	
23	24 09:00a - 05:00p	25 10:00a - 04:00p	26 09:00a - 05:00p	27 10:00a - 04:00p	28 10:00a	29	
30							

To use a timesheet:

1. Open the **Employee Center**.
2. Select the **Timesheets** task in the **Task Bar**.
3. Highlight the employee whose timesheet you want to edit.
4. When the employee arrives, click the  **Clock In** button at the top of the **Work Area**.

5. When the employee leaves, click the  button at the top of the **Work Area**.

To manually enter or edit the clock in or clock out time:

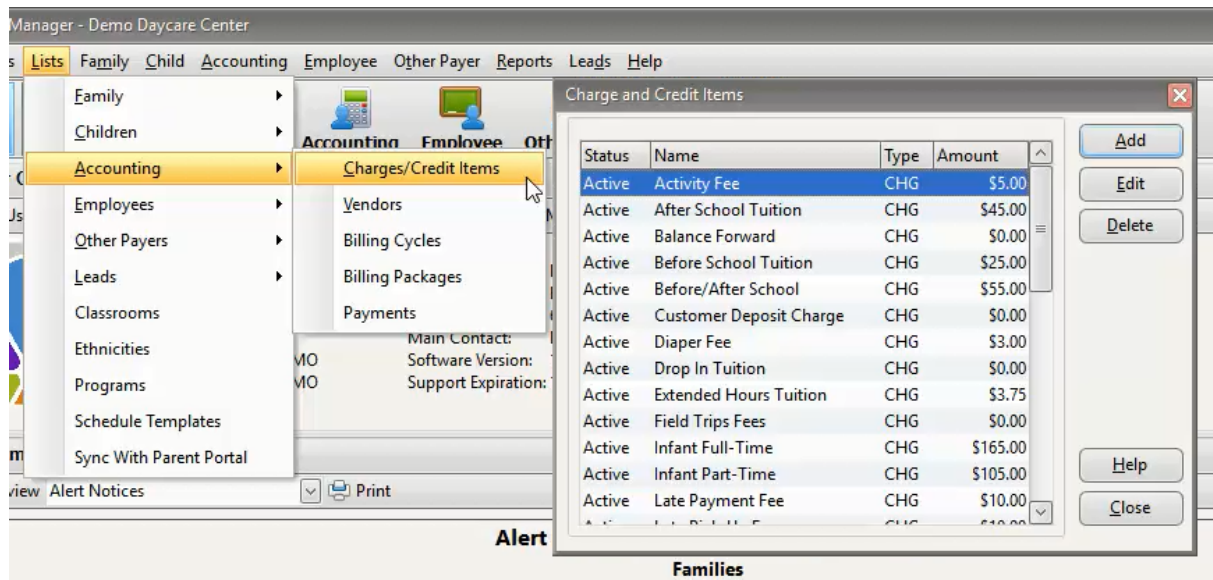
1. Click the  button.
2. To add a new timesheet record click **Add**.
3. To edit a timesheet record, highlight the record and click **Edit**.
4. Fill out the Time Entry window and click **OK**.

7 Billing and Receiving

Some of the most important aspects of a company are the finances. Childcare Manager's financial tools are designed to streamline your billing and receiving of payments, so you can spend your time doing more important things than book-keeping.

Billing

Before you can bill a customer you need to create a list of goods and services your childcare facility offers. Childcare Manager calls this the **Charge and Credit Items** list. The **Charge and Credit Items** list comes with a number of default goods and services that include tuition, food and activities. These items may or may not be useful to you, which is why they can be **Edited** or **Deleted**.



To open the **Charge and Credit Items** list:

1. Click **Lists** in the **Menu Bar**.
2. Hover over **Accounting**
3. Select **Charge/ Credit Items**.

To **Add** an item in the **Charge and Credit Items** lists:

1. Click **Add** to open the Item window.
2. Select the type of item from the **Type** drop down list:
 - a. A **Charge** is a good or service your customers buy from you.
 - b. A **Credit** is a discount or refund the customer receives from you.
3. Enter the name of the item.
4. Link the item to an account by selecting an account from the **Account** drop down list.
 - a. Childcare Manager comes with numerous default accounts. Accounts can be **Added, Edited** and **Deleted** from the Chart of Accounts in the **Accounting Center**.

For more information on **Chart of Accounts**, please visit the **Chart of Accounts** topic in the Help manual.

5. Enter the cost of the item in the **Default Amount** box.
 - a. This amount can be changed when you add the charge or credit to a family account.
6. Enter the **FTE** (Full Time Equivalent) if necessary.
7. Click the **Restrictions** check box to add minimum and maximum amounts to the item.
 - a. Click the **Allow Override with Password** check box to make it possible to input amounts outside the minimum and maximum amounts. The password is your **User Initials** and **User Password**.

For more information on how to set up **User Initials** and a **Password**, please visit the **Protecting Your Data-How to Utilize Users Manager** topic in the Help manual.

8. Make sure the account is **Active** and click **OK**.


To **Edit/ Delete** an item in **Charge and Credit Items** lists:

1. Highlight the item you want to **Edit** or **Delete**.
2. Click **Edit** to open the Item window.
 - a. Make the necessary changes.

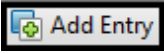

3. Click **Delete** and confirm you want to delete the item.
 - a. If the item still has journal activity, then you will not be able to delete it.

Now that you have an item list you can bill your customers. If you want to bill an individual for a one time item the best way to do so is with the **Enter Charge** button. If you want to bill your customer for a recurring charge like tuition, then you will want to use the **Contract Charges** task.

To Enter a Charge:

1. Open the **Family Center**.
2. Select the **Receivables** task from the **Tasks Bar**.
3. Highlight the family you want to charge in the **Family List**.
 1. Click the  button at the top of the **Work Area**.
 2. Fill out the Enter Charge Statement window and click **Post**.

OR

1. Click the  button at the top of the **Work Area**.
2. Fill out each column in the **Family Receivables** ledger and click .
 - a. You can **Edit** or **Void** charges from the **Family Receivables** ledger by clicking the charge and choosing the appropriate button from the top of the **Work Area**.

Family Receivables - Beckham

Add Entry
 Edit Entry
 Post Entry
 Void Entry
 Cancel Changes
 Receipt
 Statement
 Email Statement
 Enter Charge
 Rate Calculator
 2-Line
 Help

User	Date	Comment	Item	Child	Charged	Paid	Balance
Joe	2/17/2017		Toddler Full-Time Tuition	Devin	\$145.00	\$0.00	\$145.00
Joe	2/17/2017		Credit Card Payment		\$0.00	\$145.00	\$0.00
Joe	2/17/2017		Credit Card Payment		\$0.00	\$5.00	(\$5.00)
Joe	2/20/2017		Activity Fee	Devin	\$5.00	\$0.00	\$0.00
Joe	5/1/2017		Activity Fee	Devin	\$5.00	\$0.00	\$0.00

Activity Fee
 After School Tuition
 Balance Forward
 Before School Tuition
 Before/After School
 Customer Deposit Charge
 Diaper Fee

To enter a **Contract Charge**:

1. Open the **Family Center**.
2. Select the **Contract Charges** task from the **Tasks Bar**.
3. Highlight the family you want to charge in the **Family List**.
4. Click the **Add Item** button at the top of the **Work Area**.
5. Fill out the Edit Billing Item window and click **OK**.

Family Contract Charges - Beckham

Add Item
 Edit Item
 Delete Item
 Groups

Edit Billing Item

Contract Charge Type

Charge/Credit Item
 Billing Package Item

Payer: Beckham Cycle:

Item: Amount: Bi-Monthly
 Child: Daily
 Weekly
 Monthly
 Annual

Comment:

OK Cancel

The Edit Item Billing window:

The Edit Billing Item window is similar to the Enter Charge Statement window. The noticeable differences are the **Contract Charge Type** option and the **Cycle** drop down list.

1. **Contract Charge Type** option gives you two choices.
 - a. **Charge/ Credit Item** option lets you choose a charge or credit item from the item drop down list. **Charge/ Credit Items** have a fixed price.
 - b. **Billing Package Item** option lets you choose a billing package item from the item drop down list.


Billing Package Items have a variable price that changes based on the attendance hours of the child.

For more information on **Billing Packages**, please visit **Billing Customers-How to Setup Billing Packages** topic in the Help manual.

2. Cycle drop down list lets you choose the billing cycle of the **Charge/ Credit Item** or **Billing Package**. To add, edit or delete a billing cycle press the **Custom Field** button next to the **Cycle** drop down list.

Sometimes you may want to bill multiple customers at the same time. The easiest way to do this is by using the **Batch Bill** task.

To **Batch Bill**:

1. Open either the **Family Center** or the **Accounting Center**.
2. Select the **Batch Bill** task from the **Tasks Bar**.
3. Choose a **Bill by** option.
 - a. **Batch Billing** offers you many different ways to bill multiple customers at the same time. At the top of the **Batch Billing** window is a brief description of the **Bill by** option.
4. Fill out the **Batch Billing** window and click **Preview & Post**.
5. A Batch Billing Preview window will open showing you all of the customers that meet the criteria you specified in the Batch Billing window.
 - a. If there is an error with a customer, a **Red Flag** will appear next to their name. To view the error(s) click the  **Errors** button.
6. When you are satisfied with your batch bill click **Post**.

Receiving

After you bill your customers, you will need to be able to receive payments. Childcare Manager takes

care of the difficult accounting for you, so all you need to do is enter the payment. If you have a Rapid Tuition account, you will be able to process credit card payments, process check conversions and give your customers the option of signing up for autopay. You can still use all the major accounting functions of Childcare Manager without signing up for RapidTuition, but RapidTuition makes accounting much easier. For more information on all the features included in RapidTuition, please visit the RapidTuition section in the Help manual. To learn more about setting up a Rapid Tuition account, call Childcare Manager [customer service](#) today.

The first step when you activate your **Rapid Tuition** account is to enroll your customers so they can use the service.

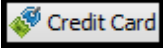
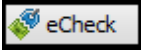
To enroll a customer:

1. Open the **Family Center**.
2. Highlight the family you want to enroll in the **Family List**.
3. Select the **Rapid Tuition Family Enrollment** task from the **Tasks Bar**.
4. Choose their **Payment Type** and enter their **Account Information**.
 - a. **RapidTuition Autopay Options** have default settings that can be changed. There is more information on the **Autopay Options** at the top of the RapidTuition Family Enrollment window, or in the Help manual in the section RapidTuition Family Enrollment.
 - b. The remaining fields are optional.
5. Review the information and click **OK**.

Now that you have a customer enrolled, you can receive their payments through **RapidTuition**. You can still access the **Receive Payments** task without **RapidTuition**, but it acts more as a book-keeping mechanism. With **RapidTuition** you be able to do receiving, making deposits and book-keeping all at the same time. For the purposes of this guide, the **Receive Payments** task will be explained as if you had **RapidTuition**. The only difference between the two is that those with **RapidTuition** will have more options.

To Receive Payments:

1. Open either the **Family Center** or the **Accounting Center**.
2. Select the **Receive Payments** task from the **Tasks Bar**.

3. Select a customer from the **Customer** drop down list.
4. Select a payment type from the **Payment** drop down list.
 - a. If you want to use a credit card stored through **Rapid Tuition**, enter the credit card information, or to swipe a credit card using [Rapid Swipe](#) press the  button.
 - b. If you want to process a check, press the  button and scan the check with the [Rapid Swipe](#) check reader.
5. Enter the payment amount in the **Amount** box.
6. Review the information and click **OK**.

If you want to receive more than one payment at a time, the only way to do this is with **RapidTuition Autopay**.

RapidTuition Autopay

Check the customers and set the amounts you would like to process in this autopay batch.

Run Date: 5/2/2017 ACH Deposit Date: 5/3/2017 CC Deposit Date: 5/3/2017

Batches with a Run Date of today submitted after 9pm ET are run the next bank day.

Memo:

Autopays are deposited in: Bank of America

	Type	Customer	Payer	Group	Max Payment	Balance	Payment
<input checked="" type="checkbox"/>	CC	Johnson	Primary		\$300.00	\$145.00	\$145.00
<input checked="" type="checkbox"/>	CC	Lee	Primary	Butterflies	\$200.00	\$210.00	\$200.00
<input checked="" type="checkbox"/>	CC	Lee	Secondary		\$5,000.00	\$210.00	\$10.00
<input checked="" type="checkbox"/>	CC	Ming	Primary		\$5,000.00	\$90.00	\$45.00
<input checked="" type="checkbox"/>	CC	Ming	Secondary		\$5,000.00	\$90.00	\$45.00
<input checked="" type="checkbox"/>	CC	Mitchell	Primary		\$5,000.00	\$470.00	\$235.00
<input checked="" type="checkbox"/>	CC	Mitchell	Secondary		\$5,000.00	\$470.00	\$235.00
<input checked="" type="checkbox"/>	CC	Reeder	Primary		\$5,000.00	\$952.50	\$952.50

\$1,867.50

Print Autopay report after post

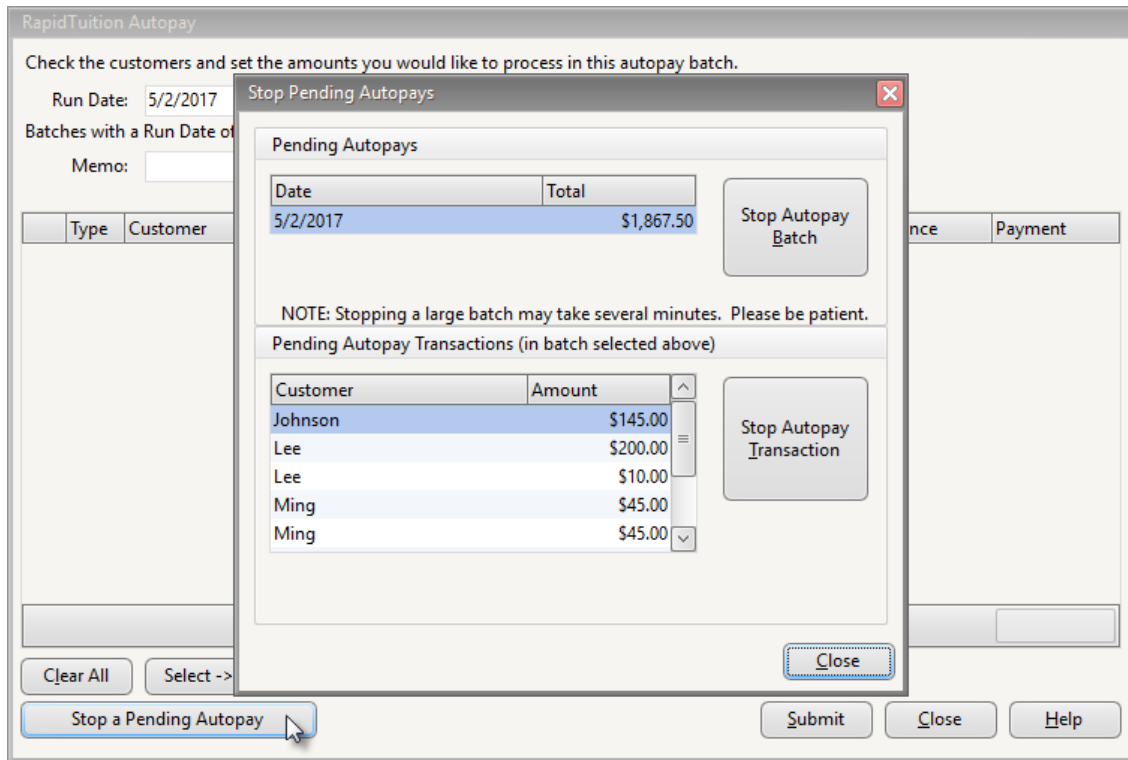
To enter an autopay batch:

1. Open the **Accounting Center**.
2. Select the **RapidTuition Autopay** task from the **Tasks Bar**.
3. Choose your **Run Date** and add a **Memo** if necessary.
4. Select the customers for the autopay batch:
 - a. You can manually un-check each customer you do not want to include in the batch.
 - OR**
 - b. You can click the **Select** button and filter the list by **Group** or **Transaction Type**.

5. Review the batch and click **Submit**.

Only customers enrolled in **RapidTuition** with an outstanding balance will show up in the RapidTuition Autopay window.

What if you make a mistake and run an autopay batch too soon, or include a customer that was not supposed to pay yet? You don't have to worry about these problems with **Rapid Tuition**, because they are too simple to fix.



To stop a pending batch or transaction in autopay:

1. Open the **Accounting Center**.
2. Select the **Rapid Tuition Autopay** task from the **Tasks Bar**.
3. Click **Stop a Pending Autopay**.
4. Select the batch or transaction you wish to stop, and click the **Stop Autopay Batch** or the **Stop Autopay Transaction** button.
 - a. Your autopay batches will be in the top box, and the individual transactions that make up the batch will be in the bottom box.
5. To confirm the stop payment click **Yes**.
6. You can continue to stop payments or click **Close** to exit the window.

You cannot stop payment once it has been deposited. The ACH and Credit Card deposit dates for a batch are listed at the top of the RapidTuition Autopay window.

8 Report Center

The **Report Center** is where you can find, modify and run all the reports found in Childcare Manager. Knowing how to navigate and utilize the **Report Center** is important to viewing various types of center information in an organized way.

The **Report Center** is divided into four sections.

The screenshot shows the Childcare Manager - Demo Daycare Center interface. The 'Report Center' tab is active. The interface is divided into four sections as indicated by callout boxes:

- 1- Report List:** A list of reports in the 'Child Information' category, including Activity List, Activity Summary, Age, Allergies, Birthdays, and Census Information.
- 2- Report Categories:** A list of categories on the left sidebar, including Accounting (Center Finances), Accounting (Expenses), Accounting (Income), Child Attendance, Child Information, Child Scheduling, Employee Information, Employee Scheduling & Time, Family Information, Forms, Letters, & Labels, Leads, Occupancy, FTE, & Staffing, and Other Payor Information.
- 3- Report QuickView:** A section showing the 'Report Description' for the selected report, including filters and sort fields.
- 4- Report Preview:** A section showing a preview of the first page of the report, including a table of census information.

Child's Name / DOB	Address	Parental Name	Ethnicity	Gender	Program	Primary Classroom
Anderson, Joyce 05/06/08, Age 9	525 Cherry Street Phoenix, OR 97535	Anderson, Sandy Anderson, Mike	White	F	Preschool	Butterflies
Anderson, Michael 03/27/02, Age 15	525 Cherry Street Phoenix, OR 97535	Anderson, Sandy Anderson, Mike	White	M	Before & After Care	School Kids Club
Bailey, Brianna 02/16/03, Age 14	1500 New Address Phoenix, OR 97535	Bailey, Laura Bailey, Jeff	White	F	Before & After Care	School Kids Club
Bailey, Cindy 12/04/03, Age 13	1500 New Address Phoenix, OR 97535	Bailey, Laura Bailey, Jeff	White	F	Before & After Care	School Kids Club
Bailey, Tawny 09/30/10, Age 6	1500 New Address Phoenix, OR 97535	Bailey, Laura Bailey, Jeff	White	F	Toddler	Two's
Bedham, Devin 01/28/15, Age 2	15 Merriweather Road Phoenix, OR 97535	Bedham, Claire Bedham, Allen	White	M	Infant	Blue Room
Bernard, Lilah 12/23/13, Age 3	1631 Alliquam St Brooklyn Park, ME 27781	Bernard, Seth		F		
Carter, Carney	725 Freeman	Carter, Suzanne	White	F	Preschool	Dandelions

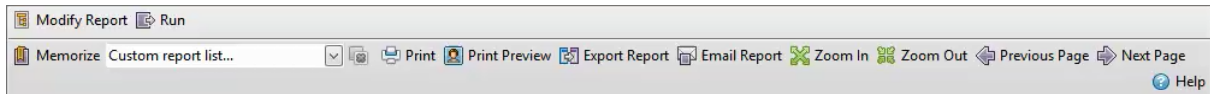
1- Report List is a list of all the specific reports found in the highlighted report category.

2- Report Categories group the specific reports based on similar information. For example, all of the reports in the **Child Attendance** category involve attendance information based on the children in your center.

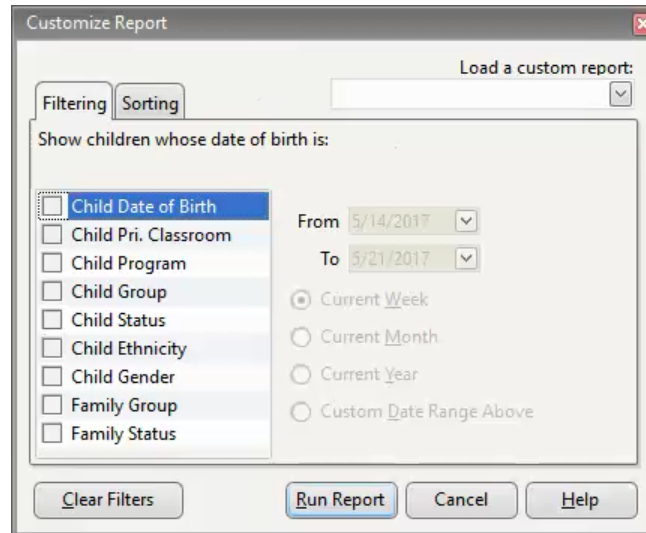
3- Report QuickView gives you a description of the exact information found within the report. The **Report QuickView** also provides you with a list of possible filters and sorting fields for that report.

4- Report Preview gives you a preview of the first page of the report. You can cycle to other pages of the report with the **Previous Page** button and the **Next Page** button.

The **Report QuickView** also contains a quick access toolbar tailored for reporting. Learning the different functions of each button helps you get the most out of the **Report Center**.

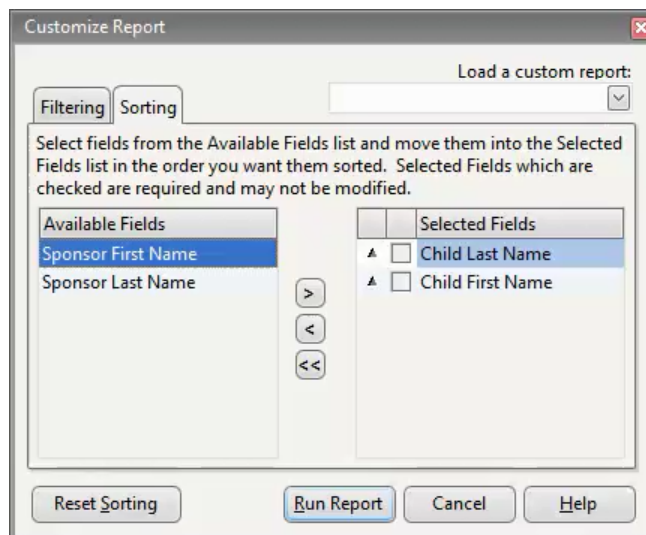


Modify Report opens the Customize Report window, where you can filter or sort the fields of the report highlighted in the **Report List**.



Filtering allows you to customize your report to display only the information you want. For example, you may want child attendance records for a specific class.

1. To use a filter:
 - a. Click the check-box next to the appropriate filter.
 - i. You can use as many filters as you want.
 - b. Fill out the necessary information specific to that filter.
 - i. This information will be found to the right of the filter choices.
 - c. Click **Run Report**.



Sorting allows you to customize your report to display the information in a certain sequence. For example, you may want child attendance records to be displayed by the sponsor's last name.

1. To sort your information:
 - a. Select the **Sorting** tab in the Customize Report window.
 - b. Highlight the appropriate sorting field from the **Available Fields** box.
 - c. Click the greater than sign (>) between the **Available Fields** box and the **Selected Fields** box.
 - i. The report will sort your information in the order the fields appear in the **Selected Fields** box. To change the order, you will need to remove all fields from the **Selected Fields** box, and replace them using the fields in the **Available Fields** box.
 1. To remove all the fields in the **Selected Fields** box at the same time, click the double less than sign (<<).
 2. To remove a single field from the **Selected Fields** box, highlight the field and click the less than sign (<).
 - d. When you finish selecting sorting fields, click **Run Report**.

Run opens the highlighted report in the **Report Preview** area.

Memorize opens the Memorize Report window, where you can save the filter and/ or sorting options from a specific report.

1. To memorize a report:
 - a. Click **memorize** in the quick access toolbar.
 - b. Enter a name in the **Name** field.
 - c. Click **OK**.

Custom report list is a list of memorized reports for the report highlighted in the **Report List**.

Print allows you to print the open report.

Print Preview allows you to view a copy of the open report before you print it.

Export Report allows you to save the open report to your computer.

Email Report allows you to email the open report.

Zoom In makes the report larger in the **Report Preview** area.

Zoom Out makes the report smaller in the **Report Preview** area.

Previous Page cycles to the previous page of the open report. If there is no previous page, then the **Previous Page** button will do nothing.

Next Page cycles to the next page of the open report. If there is no next page, then the **Next Page** button will do nothing.

Help opens the **Report Center** section of the Childcare Manager help manual.

9 Additional Features

Congratulations you can now run your childcare facility using Childcare Manager, but don't forget to check out all of these amazing additional features.

- The **Accounting Center**: Center where you keep track all your accounts payable and accounts receivable. Understanding the **Accounting Center** can be a little tricky so we have included some outside reading and viewing material you may find helpful.
 - Childcare Manager Help:
 - **Accounting Center**
 - **Accounting Basics**
 - **Chart of Accounts**
 - Outside Help:
 - [The Accounting Game](#) by Darrell Mullis and Judith Orloff
 - [Accounting Fundamentals](#) on [Lynda.com](#)
- The **Lead Center**: This new Center is a great marketing tool that lets you organize, contact and schedule events that involve your leads.
 - Childcare Manager Help:
 - **Lead Center:**
 - **Child Information**
 - **Lead Tasks**
- **Users Manager**: Option that lets you setup multiple user accounts where the administrator can restrict or allow a user's access to particular applications within your center.
 - Childcare Manager Help:
 - **Protecting Your Data**
 - **How to Utilize Users Manager**
- **Export to Quickbooks**: Function that lets you integrate your Childcare Manager data with Quickbooks.
 - Childcare Manager Help:
 - **Exporting to Quickbooks**
- **Rapid Tuition**: A payment processing solution that is integrated with you Childcare Manager software. **RapidTuition** lets you process ACH transaction, credit cards and checks. For more information please contact customer support at 800-553-2312.
 - Childcare Manager Help:
 - **RapidTuition**
- **CCM Online**: An group online tools that integrate with your Childcare Manager software. These tools provide greater communication with your parents, and increases the resources your childcare facility can use to be successful. For more information on **CCM Online**, please contact customer support at 800-553-2312 or visit the [Childcare Manager Online](#) website. Below is a list of **CCM Online** tools you can use with your Childcare Manager.
- The **Parent Portal**: Family Center task that helps you manage your online Parent Portal through Childcare Manager. Registering a **Parent Portal** for your childcare facility gives you an easier way to enroll children in your school, a stronger connection with your existing parents, and the parents will have access to their personal information so they can update and add to it when it changes. For more information please call customer support at 800-553-2312.
 - Childcare Manager Help:

- **Family Center**
 - **Family Tasks**
 - **Parent Portal**

- **Batch Email:** Family, Child, Employee and Lead Center task that lets you email multiple families or employees at the same time. Great way to communicate with your employees or the parents of a single classroom.
 - Childcare Manager Help:
 - **Batch Emailing**

- **Group Text Messaging:** Family, Child and Employee Center task that lets you send text messages to multiple families or employees at the same time. Another great communication tool.
 - Childcare Manager Help:
 - **Send Group Text Messages**

