Welcome to the SuperFox Quick Start Tutorial

This tutorial will help you become accustomed to the basics of using SuperFox. This Tutorial is split into eleven short sections that you can use at your own pace. You should use the sections in this order as some refer back to previous sections

Section 1 Introduction to SuperFox, a quick tour of the program, where to find help.

Section 2 Entering Setting Details.

Section 3 Entering Family Details.

Section 4 Setting Up Opening Hours and Services Provided.

Section 5 Making Bookings.

Section 6 Using Registers, Calendars and Timelines.

Section 7 Running Family Accounts and invoicing.

Section 8 Free Entitlement returns.

Section 9 Some other useful SuperFox functions.

Section 10 Staff and Volunteers.

Section 11 Getting started, program updates.

Assumed Knowledge

A basic familiarity with computers would be useful, but you do not need a black belt in accounts to use this tutorial. The family accounts and invoicing are simple to understand and the tutorial has been kept free of jargon.

CONTENTS

1.   Using This Tutorial

This Quick Start tutorial will show you how to load up your setting and family and how to make bookings, register pages and invoices.

The program includes an example setting that is a pre-school with a breakfast club for older children.

SuperFox works just as well with nurseries and out of school clubs and the examples are just as valid for these settings too.

2.   Lets Start!

If you have not already done so please start by installing the program on your computer, you should do this from a computer user's account that has Administrator privileges.

Now

Go to the computer desktop > locate the SuperFox Program and double click it to start the program.

The very first time you run SuperFox the program will tell you that it cannot find a database file and that it will create one.

Now Let's Login

The SuperFox Login screen will now appear.

For this tutorial choose **'Full Access'** so that you can enter all sections of the program.

Now enter the initial password for Full Access

The default passwords are: **"superfox"** (lower case) for **Full Access**

"quickfox" (lower case) for **Assistant Access**

'**Assistant Access'**. This gives access to fewer areas of the program and is suitable for working with family details, bookings, registers and invoices. The initial password is:

3.   Finding Your Way Around SuperFox

Now that you have logged into SuperFox you can see the **Home Page**. Please click on the maximise button to make the program as big as possible.
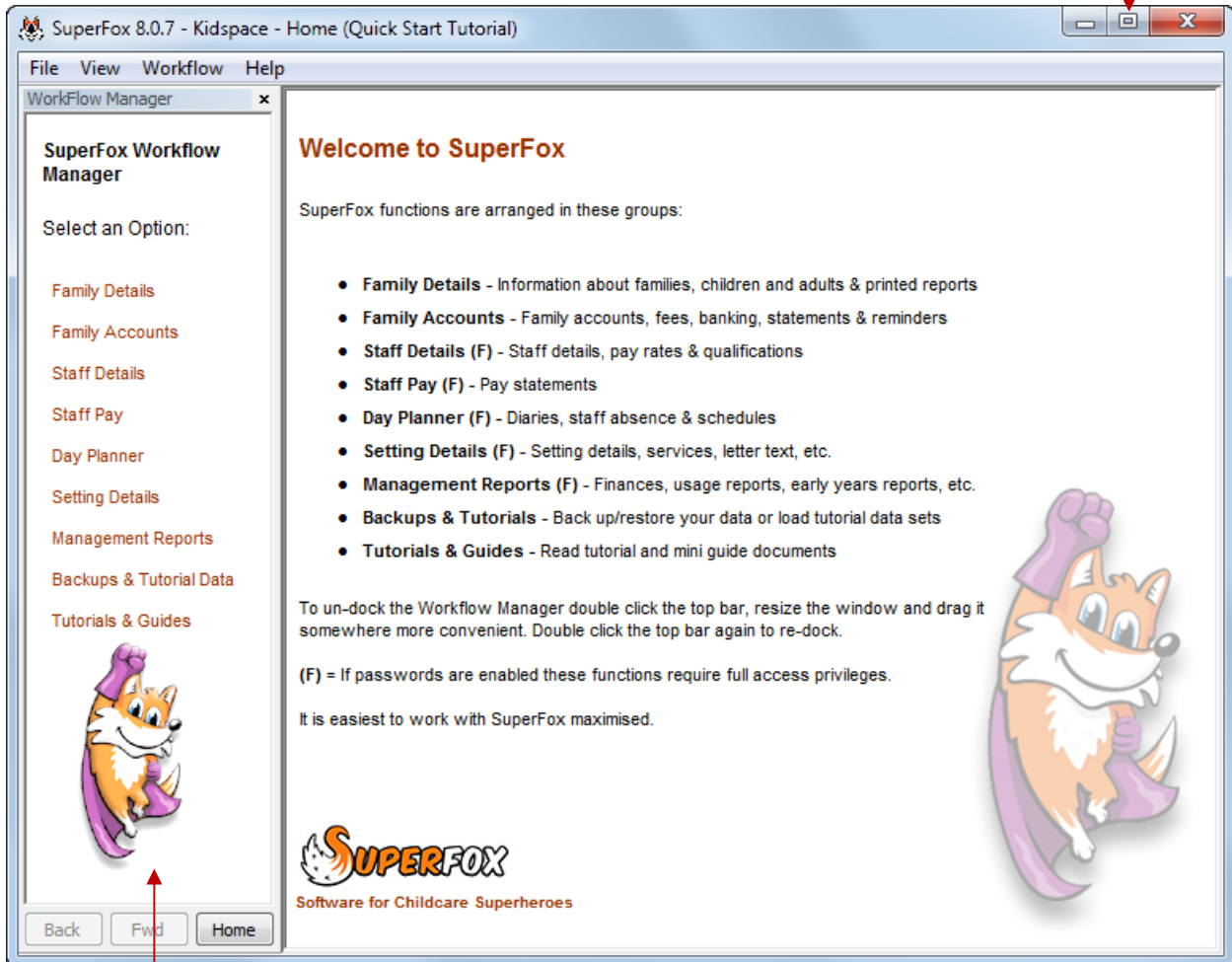
There are clickable links at the left hand side of the Home Page that to take you to the different sections of the program. The sections are:

- Family Details   -   Information and printed reports about the children.
- Family Accounts   -   Invoicing and credit control
- Staff Details   -   Information and printed reports about staff
- Staff Pay   -   Gross pay statements
- Day Planner   -   Staff schedules and diaries
- Setting Details   -   Setting details, registration limits and services provided
- Management Reports -   Financial, usage and free entitlement reports, milk claims
- Backups &
      Tutorial Data   -   Make backups and load example data.
- Tutorials & Guides   -   A copy of this tutorial and in-depth mini guides for key topics.
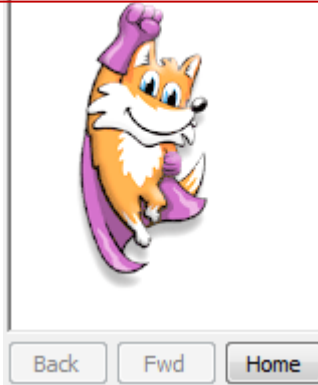
 Wherever you are in the program you can always get back to the Home Page by clicking on the **Home button**.

4.   Where To Find Help

There are three great places to find help in SuperFox.

A) Tutorials & Guides

Every section of the program has a menu link to the Tutorials and Guides page.

Click on Tutorials and Guides to go to the Tutorials and Guides page.

The page contains a copy of this tutorial and mini guides to all of the key topics in SuperFox. Simply click on a topic in the main part of the page to launch the help document.

When you have finished looking at the Tutorials & Guides page click on the Home button to return to the Home Page.

B) Help Buttons

Many of the forms and screens in SuperFox have help buttons. If in doubt, or if using a form for the first time press the Help button to find out all about the form.
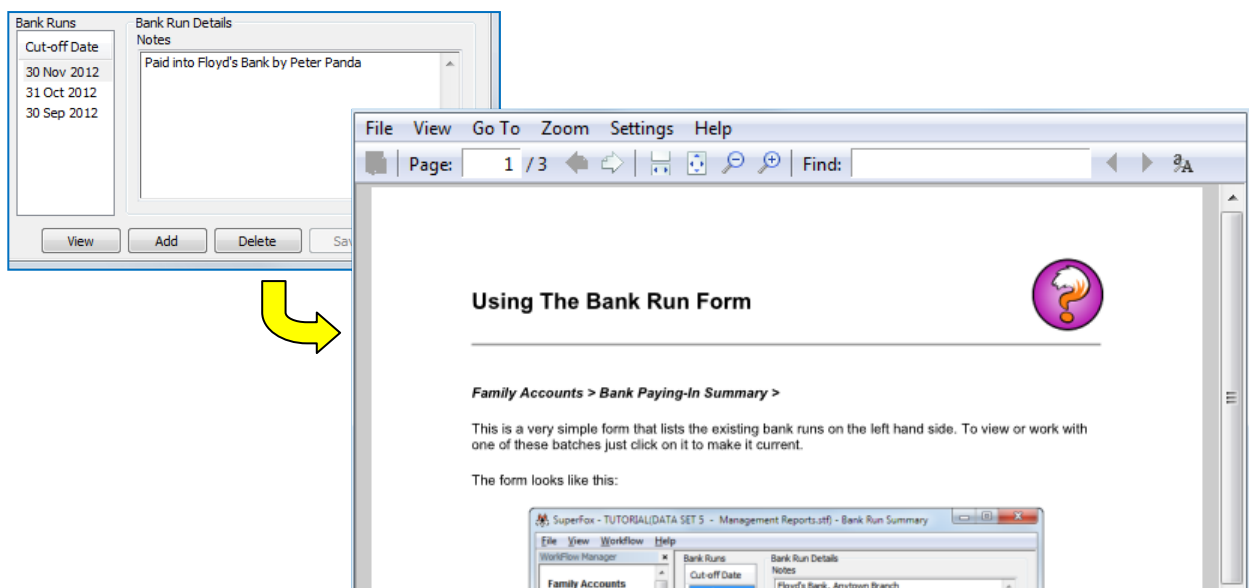
C) The Help Topics Browser

The traditional menu at the top of the program has a 'Help Topics' menu option. This launches the pop-up help topic browser.

The Help Topic browser lets you look through all the mini guides and the button help in the same place.

Software for Childcare Superheroes. © Helios Computing Ltd.
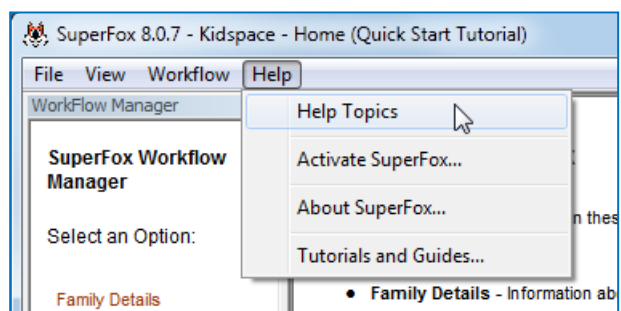
5.   About The Tutorial

A) We Will Cover The Following Topics

    a) Make a backup folder and take a first backup.

    b) Entering your setting details and registration limits.

    c) Entering family details.

    d) Using printed reports.

    e) Entering your opening hours and the services you will provide.

    f) Making and viewing bookings, producing register pages.

    g) Handling payments received.

    h) Creating invoices and using the credit control functions.

    i) Making returns for children accessing the nursery Free Entitlement.

This is the same order that you will use to enter the details for your own setting.

## B) Instructions For Mouse Clicks and Key Strokes

Throughout the tutorial exercises you will see instructions that look like this:

    Go > Home > etc

It's not an invitation to look for your coat and car keys. Instead this is the start of a set of keystrokes that will always work, no matter where you are in the program.

(In this case it means start by going to the Home Page.)

During the tutorial you may be able to skip the initial keystrokes because you are already close to the function. You decide! Also, if you see the words *IMPORTANT* it means that you must pay careful attention to the instructions that follow otherwise your data will not be entered correctly.
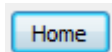
Click on the "Home" button if you get lost. It will always take you back to the home page.

C) Tip! Drag The Corners Of Small Windows To Make Them Bigger

We have put some useful time-saving tips throughout this tutorial - here is the first one!
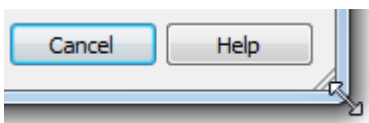
The first time you run the program some of the pop-up windows may be quite small.

Many of these pop-ups have drag handles in the bottom right hand corner.

To make the form bigger simply click on the corner and use the mouse drag it out to make the pop-up bigger. Your computer will remember the size you choose for future use.

6.   Start By Making A Backup

Making backups is an essential skill to keep your data safe, so we will start by making one.
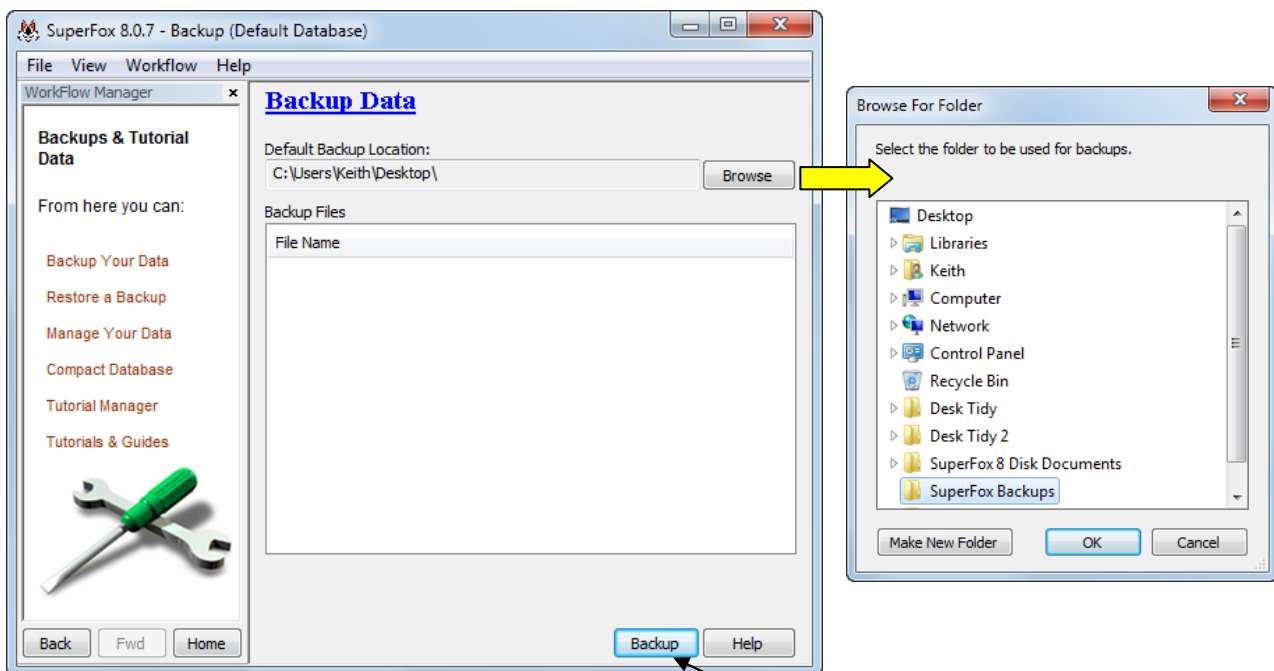
i) Make a backup folder

Start by making a new folder to keep our backups, somewhere you can easily find it again, like on your computers desktop. Give the folder a sensible name of your choice, for example 'SuperFox Backups'.
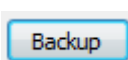
When we have made a backup to the new folder SuperFox will remember it and send future backups to the same folder. (Otherwise they will go to the desktop and that gets untidy quite quickly.)

ii) Now let's make our first backup

From the Home Page click on the **Backups & Tutorial Data** link, this will take you to the Backups & Tutorial Data section. Now choose the Backup Your Data option.

Click on the Browse button and find your new backup folder as shown below. Click on your backup folder in the pop-up 'Browse For Folder' window and press the 'OK' button.

You will be returned to the main Backup Data form. Now press the 'Backup' button to make your first backup. You will see the new backup file appear in the list of backup files.

You should make a backup whenever you have just done a lot of work in SuperFox or if you are about to use a new function for the first time. If in doubt take a backup. You can always go to your backup folder and delete the oldest backups when you are confident that they are no longer needed.

You can find out more about backups in the 'Data Backups' mini guide on the Tutorials and Guides section of the program.

7. Load The Quick Start Tutorial Data

We are now going to use the tutorial data to show how you would set up your copy of SuperFox for the first time.

We will start by loading the Quick Start tutorial data.

You may already be in the Backups & Tutorial Data section of the program, but if not please click the '**Backups & Tutorial Data**' link on the home page to come here.

Now click on the Tutorial Manager option as shown below.
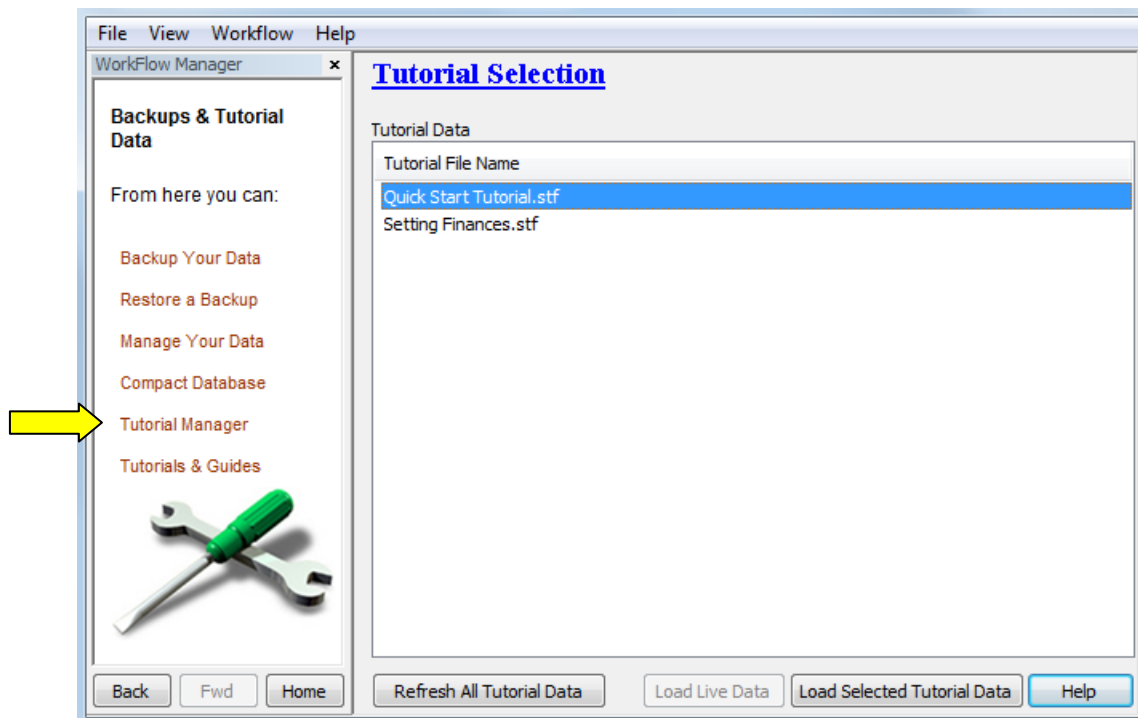
The first time you come to the Tutorial Manager the list of tutorial data sets will be blank. Click on the 'Refresh All Tutorial Data' button to refresh the list.

You can use the refresh button any time that you want to restart a tutorial and return to the original data.

Now click on the Quick Start Tutorial data set as shown above and load it by pressing the 'Load Selected Tutorial Data' button.

SuperFox will remind you not to put your live data into the tutorial data - it is just for practice. When the Quick Start tutorial data is correctly loaded you will see the title at the top of the SuperFox window has changed to show the tutorial title, check that you can see this:
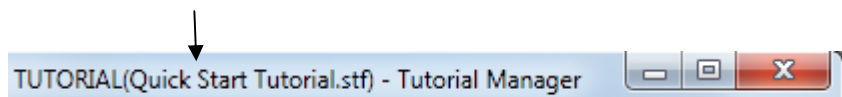
(You can return to using your live data at any time you like. Simply come back to the Tutorial Manager and click on the 'Load Live Data' button.)

8.   Entering Setting Details

The first job you will want to do when setting up you copy of SuperFox is to enter your Setting Details. From the

Go > Home > Setting Details > Setting Details >

Have a look around the screen.

This is where you will enter your setting's premises and contact addresses together with your Ofsted number and any other reference numbers that are applicable to your setting. You would simply type in your setting information and press 'Save' to save your changes.

You can set a friendly name to be included in your backup files, this is especially useful for people with multiple settings. 'Permanent Reconcile' is an advanced financial function that we will return to later.

If you have a logo you can load it into the program here to appear on your letterhead. This is very simple and there is a mini guide all about preparing a logo file.
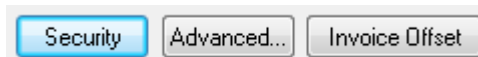
There are three buttons at the bottom of the screen

The security button allows you to change the Full and Assistant Access passwords. The Invoice Offset button allows you to choose a start number for your invoices to match your current system. The 'Advanced...' button is an advanced option for people who never collect any fees.

Tip! Use The Tab Key

You can save a lot of time by using the Tab key on your keyboard to move around the forms in the program instead of using the mouse. Try it now. To go backwards hold down the shift key while pressing Tab.

9. Entering Registration Limits

The next thing you will need to do it to enter your setting's registration limits. This is done from the Registration Limits option in the Setting Details section.

Go > Home > Setting Details > Registration Limits >

Use the top part of the form to enter the total number of children you are allowed on your registration.

Use the lower part of the form to enter any age related limits that are included in your registration.

Here our example setting is registered for 26 children in total, with a maximum of 12 children under the age of 2 years old. (Take a moment to look, the limit is set up as 12 children aged 1 and under 1 year old.)

It is important to set up your registration limits correctly as they are included in booking checks later.

FAMILY DETAILS

10. Family Details Stored By SuperFox

SuperFox stores quite a few details about the children and the related adults that make up the families. Before going on to add a family we will have a look at the stored adult and child details.

You do not have to collect and store all of these details although as a minimum children's names and dates of birth and adult's contact details are required.

The details stored are used to manage family accounts, produce register pages and other printed reports such as Free Entitlement returns and children's emergency reports. You can find many printed reports with children's details in the Family Details printed reports menu:

Go > Home > Family Details > Printed Reports >

Reminder - ICO Registration

When we keep family records on paper or on a computer it is a legal requirement that we must be registered with the Information Commissioner's Office. If you haven't already registered with the ICO, now would be a good time. A web search for 'ICO' gets you straight to the website (www.ico.gov.uk).

A) Looking At Adult Details

The adult details stored in SuperFox are basic and include contact details and any relationships to children.

Go > Home > Family Details > Adults > Choose Melissa Ant >

Melissa has two children, Adam and Peter.

Although this is not the place that you would come to a add a new family it is the right place to come to update adult details or print out a summary of an adult's details.

You an optionally store a picture of the adult. If you wish to do so use the 'Change' button to browse for the picture on your computer. SuperFox will automatically resize the picture when it is stored.

The 'Duplicate' button is a handy way to make a copy of the adult. it is a very handy way to add a spouse at the same address, all you would need to do is change the spouse's name and probably their phone numbers.

The relationship information that is stored for the related children is as follows:

- FH   - Is this adult a Family Head for the listed child.
- FH Name   - Name of any other families for which this adult is a trusted adult.
- PR   - Does this adult have Parental responsibility for the listed child.
- Relationship   - Relationship (if any) to the listed child.
- Lives With   - Does this adult live with the listed child. (Yes, No or Sometimes.)
- Alt Bill   - Is this adult an alternate bill payer for the listed child (more about this later).

B) Looking At Child Details

There is quite a lot of information that we are required to keep about the children.

Go > Home > Family Details > Children > Choose Adam Ant >

You can see that we store the child's preferred and legal names and an optional nickname to be agreed with that the child's family to distinguish between children with similar names on the register.

We also store the child's:

- Date and town of birth, gender.
- Some standard consents.
- Their doctor, dentist and any visiting professionals that work with the child, set using these buttons.
- An optional pass phrase for use over the phone.
- An optional photo (useful for at risk children and for children with serious medical conditions).
- The child's ethnicity and any Special Educational Need status.
- Medical & Dietary notes and Cooks notes.
- (Fee Exempt is intended for optional use with staff members children, if ticked the child will not be charged for their bookings. Do not confuse this with the Free Entitlement.)
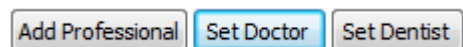
As with the adults, this is not the place that we would come to add a new family's children but it is a good place to come and change their details.

You can also print out a copy of a child's details. This is useful for new starters, children at risk, children with serious medical conditions and children moving to new rooms.

The second **Child Additional Details** tab is used to store information about:

- The child's Key Person staff member if they are in the Foundation Stage.
    (You will need to enter your staff details before selecting a Key person.)

- The child's start and leaving date.

- General notes about the child.

- Optional Custom Consents that you can define. (Home > Setting Details > Custom Consent Manager >)

- Extra information used in some Free Entitlement returns.

The General Notes field is a good place to keep Foundation Stage evidence. The parents of course have a right to see this information so the notes should confine themselves to the child's preferences and welfare.

If you are using a third party system such as PRAMS to keep the Foundation Stage notes you may be able to transfer the children's basic information to the other system by using the 'Export Children' button on the previous 'Child Details' tab.

Now that we have had a good look at the information that is stored for the adults and children in SuperFox let's go and add a new family.

11. Adding A New Family To SuperFox

* **IMPORTANT** * In SuperFox a family is a collection of adults and children:

- A Family Head   -   A trusted adult with parental responsibility, who is our main contact.
- Family Children -   Every family must have at least one child.
- Trusted Adults   -   Trusted friends and family members who might be contacted in an emergency or who might collect the children from the setting.

The Family Heads are always referred to as 'Main Contact / Person with Parental responsibility' on customer facing documents. Family Head is just a concise term that fits easily on computer screens!

The families are entered using the Family Centre option so lets go there now:

Go > Home > Family Details > Family Centre >

The first tab of the Family Centre is laid out with the same structure as our families in SuperFox. You can see a list of Family Heads, and when you click on a Family Head you can see the associated children and the trusted adults for that family.

Click on the Ant family in the list of Family Heads.

Here you can see that Melissa's family has two children, Adam and Peter.

You can also see that they have a trusted family friend, Jessica Haddock.

The relationship information for the Trusted Adults is clearly shown. There is a new item that we have not seen before, which is 'Priority'. if set this indicates which adult to contact first, second and so on, in the event of an emergency.

* IMPORTANT* When we add a new family we will always use the following sequence:

- Step 1 - Add The New Family Head
- Step 2 - Add The Family Children
- Step 3 - Add The Trusted Adults
- Step 4 - Set Up The Relationships

It is a simple process and you will soon become familiar with the steps.

Step 1 - Add The New Family Head

To add a new Family head find the 'New Family' button at the bottom of the Family Centre > Families tab > and click on it.

Halibut	Phillipa	Mrs	Captain's Lodge
Hammerhead	Julie	Mrs	10 Deep Blue Driv
Hedgehog	Harriet	Mrs	87 Leafy Lane
Heron	Carole	Dr	Keepers Lodge
Kangaroo	Katherine	Ms	Outback Cottage
Kingfisher	Calvin	Mr	4 Riverside
Leopard	Jill	Mrs	7 Prarie Drive

Back   Fwd   Home   New Family

Choose or Add a New Head of Family

Last Name	First Name	Title	Address
Anywick College			College Street
Barracuda	Barry	Mr	54 Deep Blue Drive
Bass	Bertie	Mr	32 Deep Blue Drive
Bass	Beth	Mrs	
Bass	Betty	Mrs	32 Deep Blue Drive
Bass	Bonnie	Mrs	Fish Farm
Bear	Peter	Mr	15 River Dale
Bear	Raymond	Mr	15 River Dale
Beetle	Neil	Mr	8 Woodside

Selected adult:

New Adult   OK   Cancel   Help

A pop-up will appear with a list of adults who are not currently Family Heads.

Ours is a brand new starter and is not in this list (not imported or enrolled from the waiting list) so click on the 'New Adult' button.

Now enter our new Family Head's details as shown here...
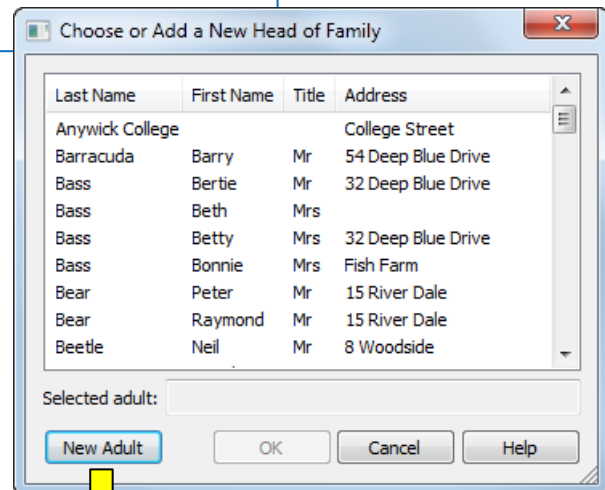
(There's no need to add the whole lot just for this exercise, one line of the address will do.)

New Adult Details

Title: Mrs
First name: Shelley
Last name: Snail
Phone (day):   01111 222222
Phone (night): 03333 444444
Phone (mobile): 07777 888888
Email address: snails@superfox.org.uk

Address
Line 1:   22 Leafy Lane
Line 2:   Foxholes
Town: Anytown
County: Northumberland
Postcode: AA1 9YY

OK   Cancel   Help
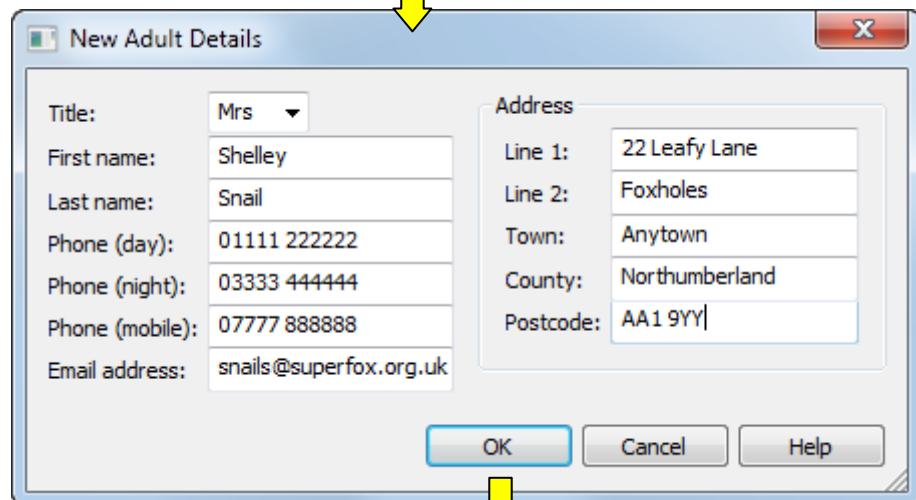
When you have added her details click on the 'OK' button and Shelley will be added to the list of adults that we could choose for our new family head.

Click on her name and then click on the 'OK' button.
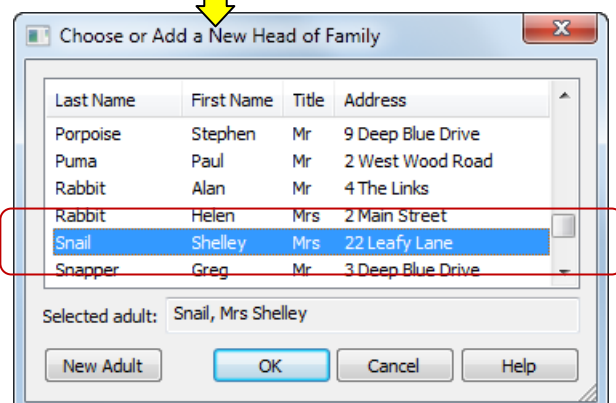
Choose or Add a New Head of Family

Last Name	First Name	Title	Address
Porpoise	Stephen	Mr	9 Deep Blue Drive
Puma	Paul	Mr	2 West Wood Road
Rabbit	Alan	Mr	4 The Links
Rabbit	Helen	Mrs	2 Main Street
Snail	Shelley	Mrs	22 Leafy Lane
Snapper	Greg	Mr	3 Deep Blue Drive

Selected adult: Snail, Mrs Shelley

New Adult   OK   Cancel   Help

You will now see that Shelley has been added to the list of Family heads.

Without leaving the Family Centre move on to Step 2. (If you leave here without adding the children needed to make a family Shelley will disappear from this list, but her details are saved as a normal adult.)

Step 2 - Add The Children

Shelley doesn't have any children yet, so we are going to add a child to her family

With Shelley selected in the list of Family Heads as shown above click on the Child Details tab at the top of the form.

Now find and click on the 'Edit Children Group' button at the bottom of the Child Details tab.

The Group Family Children form will pop-up as shown below.

This form is simple to use. You just choose a child on the left hand side and use the arrow buttons in the middle to move them right into the family, or left again out of the family.

In our example Shelley's child is a brand new starter and is not yet in the list. To add them to the list click on the 'New Child' button at the bottom of the pop-up form.

A small **'Add Child'** form will appear.

Add Gary's details as shown here.

(Gary does not have a middle name, so leave that blank.)

When you have entered Gary's details click on the 'OK' button and Gary will be added to the list of children who could join our family.

Now click on 'Snail, Gary' in the list and then click on the **>> button** to move him into the Family Children list.

When you click 'OK' Gary will have been successfully added to the children in the family.

All that now remains is to add the rest of Gary's details as shown on the next page.

Tip! Rearranging Families

You will eventually need to rearrange a family or two as parents separate or come together to form new families. SuperFox handles this very well. All you need to do is come here and use the **Edit Children Group** function to move children in and out or the families as required. It is very simple.

Use the **'Set Doctor'** and **'Set Dentist'** buttons to select the doctor and dentist. Use the **'Add Professional'** to add the dietician.

To add an identification picture just click the **'Change'** button and browse for their picture on your computer.
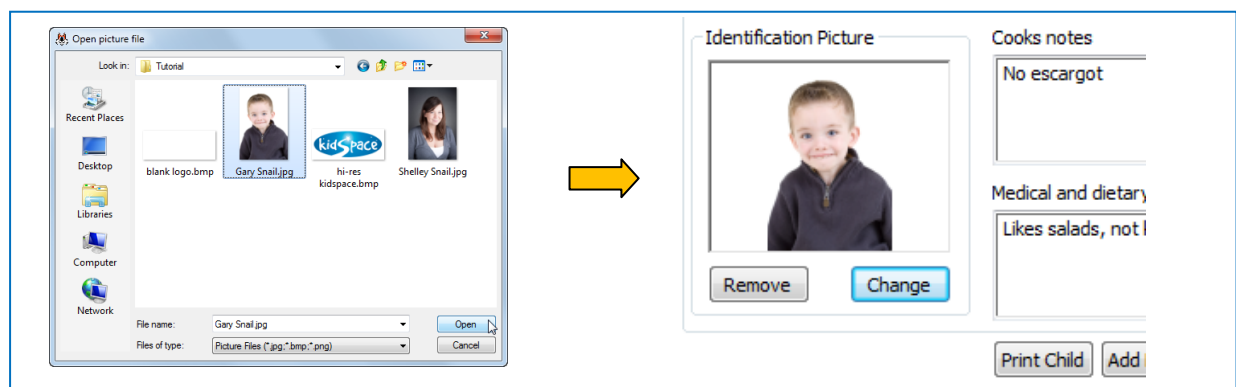
You may also wish to add **General Notes** or **Free Entitlement information** to the 'Child Additional Details tab.

Finally remember to click on the **'Save'** button to save your work.

Step 3 - Add The Trusted Adults

All we now need to do to complete this family is to set up the Trusted Adults. We do this back on the Families tab.

Trusted Friends / Family Members							
FH	Last Name	First Name	Title	PR	Priority	Relationship	Lives With	Address
*	Snail	Shelley	Mrs	N			N	22 Leafy Lane

To add an extra trusted adult, click the **'Edit Friend Group'** button under the Trusted Friends / Family Members list.

Adding trusted adults to a family is a very similar process to adding the children.

Set Relationship | Edit Friend Group | Set Head of Family | Help

Choose the adults who will be our friends in the left hand list and use the **>> button** to move them to the right list.

Group Family Friends

Head of family: Snail, Mrs Shelley

Choose adult
Bison, Mrs Felicity (7 Prarie Lane)
Bison, Mrs Vera (13 Woody Road)
Chipmunk, Mr Dale (22 Prarie Drive)
Chipmunk, Mrs Shirley (23 Prarie Drive)
Coral, Dr Sandra (Rocky Bottom)
Coral, Miss Jean (Rocky Bottom)
Coral, Mr George (Rocky Bottom)
Coral, Mr Michael
Cougar, Miss Catherine (30 The Links)

Trusted friends / famliy members
Cod, Mrs Tracey (109 Main Street)

New Adult | OK | Help

If they are no longer our friends (moved away perhaps) then we can remove them from our friends group by using the **<< button** to move them back to the left hand list.

When you have finished adjusting the trusted adults click on OK and the list of Trusted Adults will be updated to match your choice.

Trusted Friends / Family Members							
FH	Last Name	First Name	Title	PR	Priority	Relationship	Lives With	Address
	Cod	Tracey	Mrs	N			N	109 Main Str...
*	Snail	Shelley	Mrs	N			N	22 Leafy Lane

Notice that the family head always appears in the list of trusted adults. Shelley has a husband called Brian, you could add him too if you would like some more practice.

Tip! Adding A Spouse Quickly

The quickest way to add a spouse to the data is to use the **'Duplicate'** button on the *Family Details > Adults >* form. See page 11 for a reminder about how this works.

Many other SuperFox forms that handle people also have Duplicate buttons - children, staff, doctors, dentists, etc.

Step 4 - Set Up Relationships

With a trusted adult selected click on the 'Set Relationship' button to set up the adult's relationship to the children. Here is how we would enter Shelley's relationship to her child Gary.

Set Relationship, Priority and Responsibility

Adult name: Snail, Mrs Shelley

Relationship: Parent
- Parent
- Grandparent
- Uncle
- Aunt
- Brother
- Sister
- Childminder
- Carer

Contact Priority: 1

Person has Parental Responsibility: ☑

Lives With: Yes (Normally)

[OK] [Cancel] [Help]

Shelley is Gary's parent, she is the first person we will contact in the event of an emergency, contact priority 1 (leave as 0 if you do not wish to set a contact priority). She also has parental responsibility and she normally lives with Gary.

Many relationships are not shown in the pre-defined list, for example 'Step Parent'. You can simply type in these extra relationship names into the Relationship field.

You might also choose to do so if you have a very young child who knows an adult by a pet name. For example, if a child knows Grandma as 'Boo Boo' you could type in the relationship

'Grandma (Boo Boo)'

You could then tell the child that Grandma is picking them up in words they will understand.

If no relationship is entered we can assume that the adult is simply a family friend. (There is no need to enter 'Friend' as a relationship.)

Congratulations! That's all there is to adding a new family, and with a very little practice it can be quite quick.

Tip! You Can Import Child And Adult Details

The activity that takes the majority of the time when entering families is typing in the adult details. There are typically more adults than children and they all have addresses and phone numbers! There are other ways to get the adult and child information into a family that require less typing.

If you already have your setting's child and adult information in spreadsheets you can save some time by importing them into SuperFox.

This requires some care but can be well worthwhile as all you would then have to do is assemble the adults and children into families and add any missing details. If you intend to do this please read the '**Data Import**' mini guide carefully before getting started.

Tip! You Can Enrol Families Directly From The Waiting List

If you are using the Waiting List in the Family Details section you can enrol and entire family, or you can add a sibling to an existing family from the waiting list with just a couple of mouse clicks. See the **Waiting List** mini guide for more details.

12.   Classes And Groups

In SuperFox you can put the children together into two types of collection, called classes and groups.

These collections can be used to filter the content of register pages, printed reports, calendars and to make Quick Bookings for these children all together.

Groups

A group is a non-exclusive collection of children who so something together. Children can belong to more than one group.

Groups are a good way identify with children who use the mini-bus, take part in a particular activity, or stay for lunch.

Classes

A class is an exclusive collection of children, children can only belong to one class at a time.

* **IMPORTANT** * If your setting has age segregated rooms then the class is just the child's normal room.

Classes are the same as a class in a school and, if you want, they can be used more flexibly than simple child-to-room assignments.

You may choose to combine children who are normally in two rooms into one room at a quiet time of day. SuperFox can combine the two classes and perform ratio calculations, produce register pages and emergency reports for the combined classes.

For now just think about classes as being rooms. You can automatically move children to their next class on either their birthday or a specific date. You can also set up variations, like taster sessions in a different class. Because the children in a class change you need to specify the date to use when you filter by class.

You can set up and manage groups and classes from: *Go > Home > Family Details > Classes & Groups >*

13.   Children's Printed Reports

There are many printed reports that you can run for all children, classes or groups of children. Some are grab-and-go emergency reports that you should take with you, along with the register, for fire drills or off-site outings.

Go > Family Details > Printed Reports >

Children's ages, General notes, Cooks notes, Medical & Dietary notes, Emergency Contacts, Doctors & Dentists, Visiting Professionals and Key Persons summaries.

Go > Family Details > Printed Reports > Consent Summaries >

Children with and without Face Painting, First Aid, Outing, Photography and Sun Screen and Custom consents.

Go > Family Details > Printed Reports > Family Registration And Mail >

Mail merge address and e-mail data sources, a list of children's manes for your own use, and some very handy family registration and re-registration forms. The re-registration forms are part populated and make it easy for parents to check and correct their details.

The reports can be printed or saved in PDF and Office formats. See the Using Reports mini guide for details.

14. Entering Your Opening Hours

Before making any bookings we will need to enter the setting's open hours. You will only need to do this once a year and it doesn't take very long.

> *Go > Home > Setting Details > Opening Hours >*

SuperFox stores date ranges when the setting is open. Typically these are term time dates, but just enter the date ranges that suit your setting.

To add a new date range just follows these simple steps:

1. Click on the **Add Range** button to add a new date range.

2. Click on the **Date Range** button to set the first and last dates in the date range.

3. Type in a suitable **description** for the date range.

4. Enter the number of hours that you will be open on each weekday in the date range.
   (If it is zero the setting is closed, you will not be able to make bookings for closed days.)

5. If you intend to charge termly / half termly in advance tick the **Payment Date** and enter the day before the start of the term or half term.
   (Other advance charging schemes like monthly or weekly in advance are handled automatically.)

6. Press **Save** to save the date range.

* IMPORTANT* If a date range contains a bank holiday or a other inset day when the setting closes you should set up a date range either side of the closed day to avoid booking on the closed days.

Tip! If Your Setting Is Open All Year

You may still find it convenient to set up different date ranges for different times of year if your setting offers different services at these times. (E.g. term time and holiday club provision.)

Tip! Using Date Controls Quickly

There are many date controls in SuperFox. They are used to book in the children, set key dates and to filter many of the printed reports. There are several different ways that you can use them:
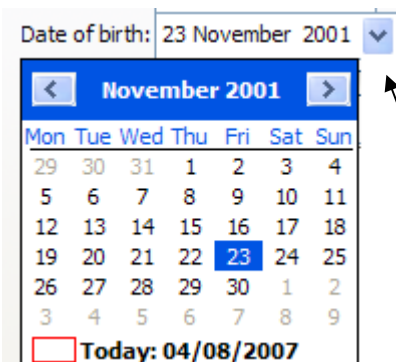
EASIEST
Set a date by clicking on the day, the month or the year and use the UP or DOWN arrows on your keyboard to make changes. You can move between day month and year using your LEFT and RIGHT arrow keys.

FASTEST
Instead of using the UP or DOWN arrows you can also set the date by typing in:

- Day number
- Month number (e.g. July would be 7)
- Year number

Alternatively, if you want to set the date using a calendar, click on the downward pointing arrow in the date box. Note that you can change the year in this date selector by clicking on the year and a control opens up beside it to scroll up or down the years.

Checking The Opening Hours On The Calendar Tab

Click on the 'calendar' tab to show the open hours date ranges. The days where the setting is closed appear in light grey. You will see this pattern on all of the other calendars in the program.

You can select an individual date range to check by turning on the sidebar. if the calendar looks cramped you can free up some space by toggling the workflow manager off. (Toggle it back on when you have finished!)
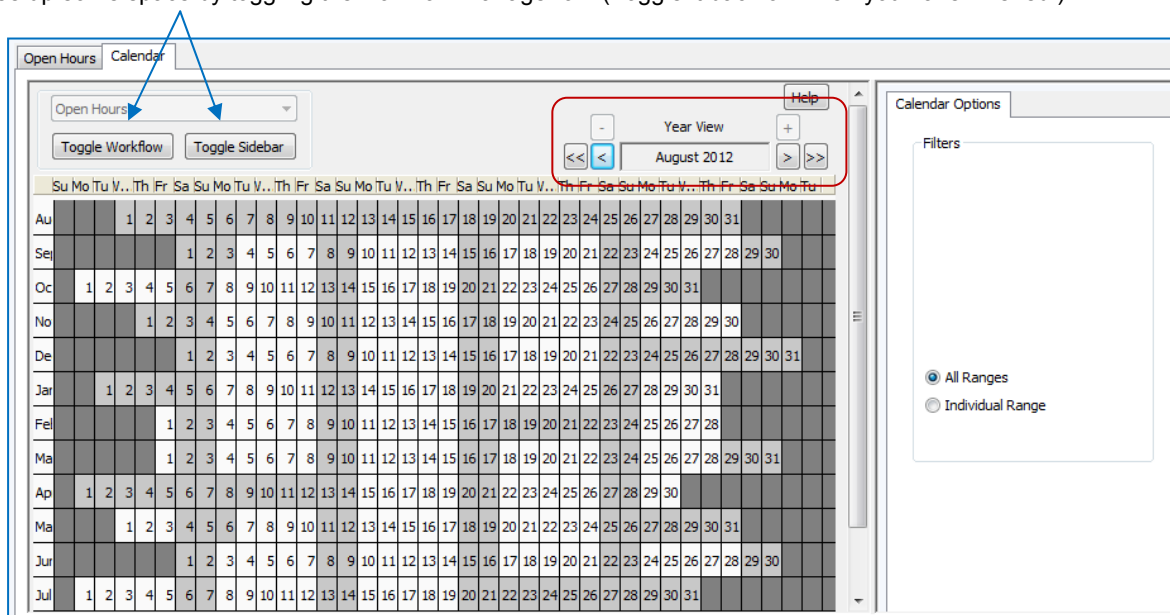
You can move the calendar backwards and forwards using the arrow buttons at the top of the calendar or by using your mouse wheel if you have one.

15. Entering Your Services

To see how services are entered go to: *Go > **Home** > **Setting Details** > **Services Provided** >*

You will see a list of services that our example setting provides.

Name	Unit Price	Alt. Price	Start Time	Duration	Free Entitlement	Sibling Disc.	Manager's Disc.	Max Participants	Hidden
Breakfast Club	£4.00	£4.00	08:00	1	☐	☐	☐	0	☐
Free Entitlement	£3.50	£3.50	09:00	1	☑	☐	☐	0	☐
Late Lunch	£2.00	£2.00	12:30	0	☐	☐	☐	0	☐
Lunch	£2.00	£2.00	12:00	0	☐	☐	☐	0	☐
Nursery Afternoon	£12.00	£12.00	12:00	3	☐	☐	☐	0	☐
Nursery Day	£24.00	£24.00	09:00	6	☐	☐	☐	0	☐
Nursery Morning	£12.00	£12.00	09:00	3	☐	☐	☐	0	☐
Pre-School Hourly	£3.50	£3.50	12:00	1	☐	☐	☐	0	☐
Sun Hat	£5.00	£5.00	00:00	0	☐	☐	☐	0	☐

There are **three types for service** that we can provide for the children and it is important to understand them:

- A. Normal paid attendances.
- B. Free Entitlement attendances.
- C. Sundry items (like Lunches or Sun Hats).

A) Normal Paid Attendances

Click on the 'Nursery Morning' service and click the 'Edit' button at the bottom of the screen. This is a service where the family pays for the child to attend. This service has:

Name
(ideally short and unique in the early characters)

Unit price

Usual start time (this can be changed at any time as the booking is made.)

Duration (e.g. 3.5 hours, an hourly service would have duration 1 hour)

It is not a Free Entitlement

We are not discounting it

The alternate price can be ignored, it is a disused discounting method.

You can set a maximum number of simultaneous participants for a service - e.g. for an optional coached activity at an after school club.

Click **'Cancel'** to leave the pop-up.

B) Free Entitlement Attendances

Click on the 'Free Entitlement' service and click the 'Edit' button at the bottom of the screen. This is a Free Entitlement attendance.

The name should mention the Free Entitlement, it will appear on invoices

If you know the reimbursement value use it for the unit price. If not, leave it as zero.

The usual start time. (Can be changed at any time as the booking is made.)

A duration (this service is hourly, so the unit duration is 1 hour.)

* IMPORTANT * Free Entitlement is selected

(This means that it is always presented as zero price on invoices, and it is sent to Free Entitlement returns.)

As it is a Free Entitlement we cannot discount the service.

Click **'Cancel'** to leave the pop-up.

C) Sundry Items - Like Lunches

Click on the 'Lunch' service and click the 'Edit' button at the bottom of the screen.

The difference from a paid attendance is that Lunch has a start time but no duration.

* IMPORTANT *

Services with a price (and all Free Entitlements) will appear on invoices.

Services with a duration will appear on normal printed register pages.

Services with no duration will only appear on Sundry Items registers. (Like children having lunch, etc.)

Click **'Cancel'** to leave the pop-up.

Tip! Sundry Items

You can use Sundry Items to book lunches or snacks for the children, they will appear on invoices and you can list them on sundry register pages for any day. If the sundry item is time dependant (e.g. lunch, snacks, mini-bus) remember to enter the time as it will make it easier to filter the sundry register pages. If there is no relevant time (e.g. sun hats) just leave the start time as midnight.

Sundry items are intended for items provided for children, and not for charges made against adults (e.g. late payment fines or opening balances). There is a separate means of making account holder charges and credits.

Tip! Service Names

SuperFox uses predictive typing for many of the data entry forms so try to keep service names short and ideally unique in the earlier characters.

BOOKINGS

16.   Making Templates For Regular Bookings

If your children have regular booking patterns, either as a group or individually, we can put together service templates to speed up the booking process.

A template is simply a list of the child's bookings for each day of the week. Here is an example.

Go > Home > Family Details > Family Centre > click on the Halibut family >

 go to the Regular Bookings tab > click on Jason Halibut > click on Jason's winter bookings template >

You can see immediately that this template only has regular bookings on Mondays and Wednesdays.

- Free Entitlement from 9am to 2pm.
- Followed by an hour of normal paid-for pre-school until 3pm.
- The day also includes Late Lunch at 12:30 as a Sundry Item (it has no duration).

Tip! Click On Column Headers To Sort Lists

Many of the lists shown in SuperFox can be sorted into a different order by clicking on the column headers. Try it!

Making a New Template - Example

Making or editing a template is very simple. While we are here let's make a second template for Jason.
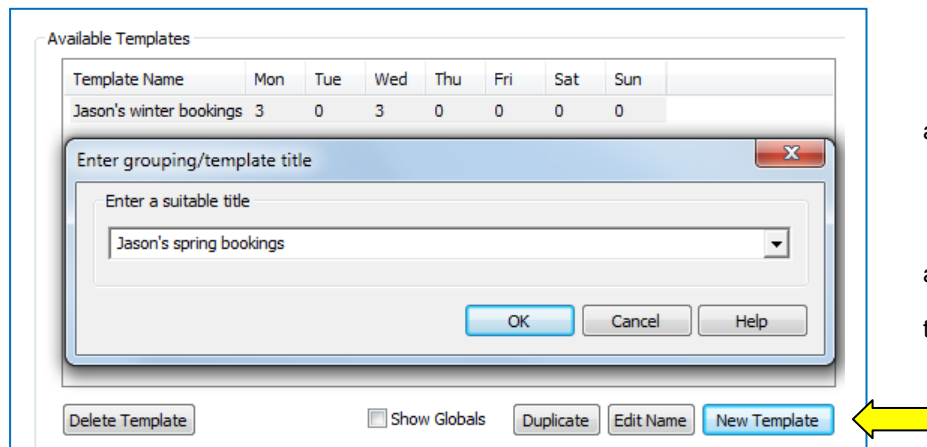
Click on the New Template button and give the new template the title

'Jason's spring bookings'

and click OK. The new template will be added to the list of available templates

Now click on the new 'Jason's spring bookings' template in the list of available templates to start adding services to the template.
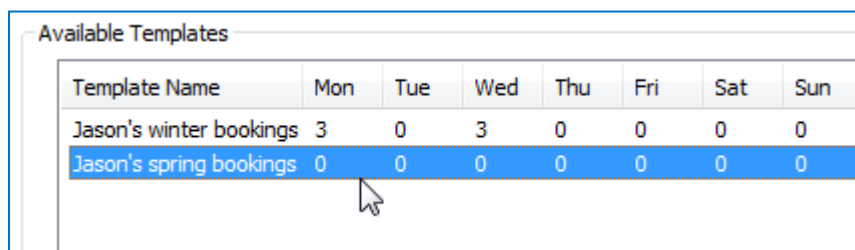
There are two ways to add services to the template:

- To add services to a single day choose the tab for the day and click the **'Add Item To Day'** button.
- To add services to multiple days just click on the **'Add Item To Week'** button.

Choose the Add Item To Week button for this example.

A pop-up form will ask you to choose the service, how many units to book and a start time. Either use the drop down list of services or begin typing the service name, SuperFox will find a match as you type.
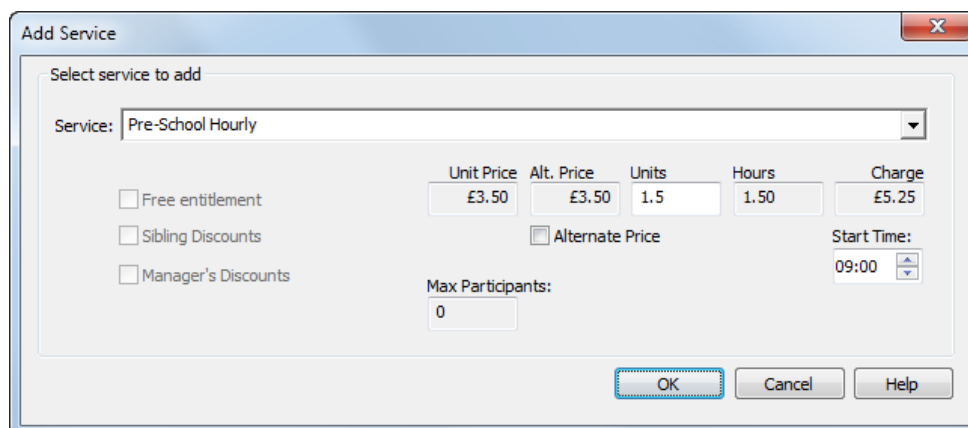
In this example choose the Pre-School hourly service, for 1.5 units starting at 9am, and then click 'OK'.
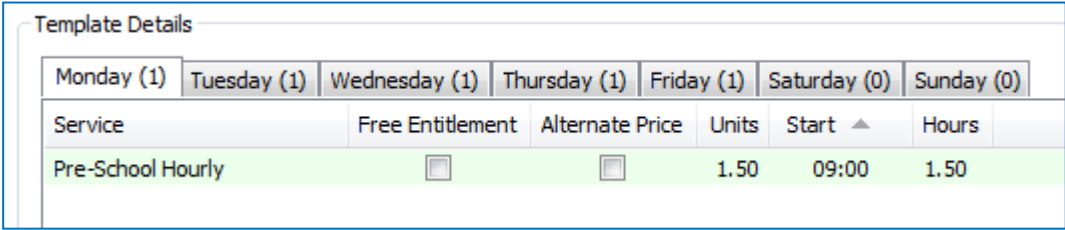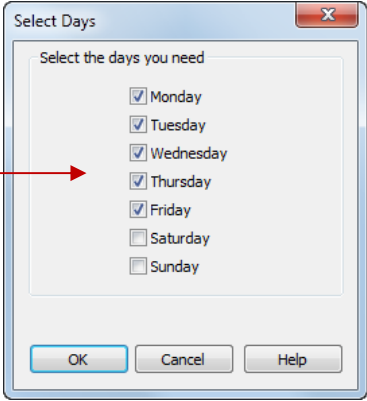
* IMPORTANT * This is an example of booking an hourly charged service. The duration of the service was set up in Services Provided as is 1 hour, and we have booked 1.5 units, i.e. 1.5 hours.

We chose the 'Add Item To Week' option so SuperFox will now ask us to choose which days to use the service.

Just tick or un-tick the days as required.

For this example tick Monday to Friday inclusive.

When you click OK the service will be added to the days that you ticked as shown below.

Child Templates

The template that we just made is specific to a particular child, Jason Halibut. A child can have as many templates as needed, we choose which one to use when we make the bookings.

If your customers have individual booking patterns then child templates are very helpful.

Global Templates

If your setting has a more standardised service where many children share the same usage pattern you may find it more useful to use Global Templates. Global Templates are set up in exactly the same way as Child Templates but they are not specific to any child.

Global templates are managed from:

Go > Home > Setting Details > Services Provided > Service Templates tab >

This form gives a good view of all of the Child and Global Templates. It is described in the Services mini guide.

Service Price Changes

You do not need to edit all of your templates if you change your service prices. Click on the service that you have changed and the **Apply Prices To Templates** button on the Services Provided form will do this for you.

Go > Home > Setting Details > Services Provided > Services tab >

This button only updates the template prices and will not make any unwanted changes to the prices of any bookings already made. The form also has a **View Usage** button that will show you which templates use a given service.

You can also apply the currently selected service prices to **un-invoiced** bookings using the **Apply Prices To Bookings** button. You will be asked for the first date to use the new prices, all subsequent un-invoiced bookings for the selected service will also have their prices updated.)

17.   Bookings

There are two ways to make bookings for the children in SuperFox and most settings will find both methods useful.

A.   The Quick Bookings Calendar

This is the fastest way of entering regular bookings. Just choose a child, choose a template and click the calendar days that you wish to book.

The Monday template items are booked onto the selected Mondays, the Tuesdays items on Tuesdays, etc.

B.   Timesheet / Register Forms

This is good for last minute attendances, or if you have any drop-in services that are not booked in advance.

18.   The Quick Bookings Calendar

The quickest way to learn about the Quick Bookings Calendar is to make a booking.

Go > Home > Family Details > Family Centre > Choose the Coypu family > go to the Calendar tab >

Now find the drop down calendar view control and select the Quick Booking calendar.

Now turn on the sidebar by clicking on the Toggle Sidebar button. If the calendar looks cramped switch off the Workflow Manager using the Toggle Workflow button.

Use the arrow buttons to bring January, February and March 2013 into view. The grey squares show days when the setting is closed. Green squares show days with a Coypu family booking.

We are going to work our way down the sidebar to make the bookings.

1. Click on 'Add Children' and choose Rose Coypu.

2. Click on 'Select Service Template' and choose 'Rose's Free Entitlement'

3. There is no need to click on the Select Date Range button. Instead:

- Click on 7th January 2013 on the calendar.
- Hold down your keyboard SHIFT key and click on 28th March 2013.
- The selected squares turn purple. (54 days selected)

4. Click on the Validate Quick Booking button to validate the bookings.

You must pass validation before you can apply the booking. It checks for booking clashes and for the setting being overbooked.

5. Choose the payment scheme that you want to use for these bookings.

(In Arrears, Monthly, Weekly or Termly in advance, etc.)

Use Monthly In Advance (Last Day) for this example.

The calendar should now look something like this:

Press the **'Apply Quick Bookings'** button. The bookings will be applied and the booked days will turn green. (Rose's template just contained services on Thursdays and Fridays.)

That was quick and easy. We will have a look at some of the Quick Booking steps in more detail.

Selecting Calendar Days

There are several ways to select days on the calendar

A. Just click on a day to select or deselect that day.

B. Select a date range using the Click then Shift Click method that we just used.

C. Double click on the Jan, Feb, etc labels at the beginning of a row to select or deselect that month. (A good way to select a month very quickly.)

D. Double click on the Mon, Tue, etc. column titles to select or deselect the days down the calendar.

Charging Schemes

SuperFox has several pre-programmed charging schemes to help us invoice in advance or in arrears.

Your choices are:

- In Arrears
- Termly / Half Termly in Advance
- Weekly In Advance (various)
- Monthly In Advance (various)
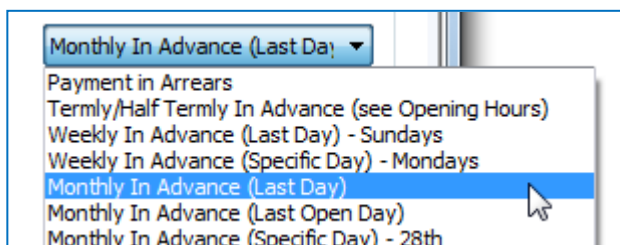
Charge Dates and Invoices

* **IMPORTANT** * There are two dates associated with each service that we book:

1) **Delivery Date** - This is the date the child will arrive and use the setting.

2) **Charge Date** - This the date that the booking becomes chargeable.

When you prepare your invoices SuperFox will ask you to choose an invoice date.

The invoices produced will use the charge date to decide whether to include a booking on the invoice.

If a booking has a charge date after the invoice date it will not be included, otherwise it will appear on the invoice.

The charge date is set automatically when you choose the payment scheme as you make the booking. It is easy to see how this works in practice.

Charging In Arrears

If you book a service to be paid in arrears then the charge date will be automatically set to be the same as the delivery date. This means that the booking will always appear on the next invoice that is produced after the booking is used.

Charging in arrears is good choice for entering extras you may sell and any unexpected late stays. They will always appear on the very next invoice after they were booked.

Charging In Advance

> *** VERY IMPORTANT ***
>
> A good choice for the charge date is **the day before** the start of the booking period.
>
> If you then prepare invoices for the same charge date it will include all of the advance charges for the period to come, and the arrears charges for the period just gone.

For example, if you charge monthly in advance a good choice for the charge date would be the last day of the previous month.

The advance charging options you can choose in SuperFox are:

Monthly In Advance

- Last Day   -   Last day of previous month, the normal choice.
- Specific Day   -   Choose an alternative day of the month between 1st and 28th instead of the last day.
- Last Open Day -   Choose the last day the setting is open instead of the last day of the month.
                       (This could be handy if you close for the summer before the end of July.)

Weekly In Advance

- Last Day   -   Last day of previous week (Sunday)
- Specific Day   -   Choose an alternative last day of week instead of Sunday

Termly / Half Termly In Advance

> If you choose this option the bookings will use the optional dates that you set up when you entered the setting opening hours (page 22). All date ranges need to have the optional payment date set before you can use this option. This prevents the booking from being made on a date with no associated charge date.

Undoing Quick Bookings

If there has been a simple mistake with the Quick bookings (put them on the wrong month, etc) you can undo them:

Go > Home > Family Accounts > Booking Centre > Undo Quick Bookings Tab >

- If the bookings are not yet on an invoice then the Undo process will delete them from the database.
- If the bookings have been invoiced the Undo process will cancel them instead

> *** IMPORTANT ***
>
> Cancelled bookings remain in the database but they will not appear on register pages or Free Entitlement returns. They will still appear as chargeable items in the invoices too. You can raise credits against the cancelled bookings from the Booking Centre > Cancellation Credits tab >.

Tip!   The quickest and easiest way to remove the unwanted Quick Bookings that have appeared on an invoice is to delete the invoice batch and then use the Undo Quick Bookings function. This will delete the booking rather than cancelling it, saving you the job of raising cancellation credits.

19. The Timesheet / Register Forms

If you need to make a small number of bookings or add an unplanned late attendance then the Timesheet and Register forms allow you to do this without making up a booking template.

Go > Home > Family Accounts > Booking Centre > Timesheet tab >

The timesheet form works in the same was as a child's timesheet. Just work your way down from the top to the bottom.

1. Choose the child for the booking.

2. Click on the blank line at the bottom of the current timesheet list (the blue line below).

3. Now choose the booking date (this is the delivery date).

4. And choose the service the child will use. (Either use the drop-down list or start typing.)

5. Choose the number of units of the service to book (One nursery afternoon session shown here.)

6. Now choose the charge date (this one is shown in arrears).

7. If it all looks okay then press save to save the booking.

The Register form works in the same way except that you would choose the day the top of the form instead of a child.

The Timesheet form is a good place to come to delete or cancel unwanted bookings. Un-invoiced bookings can be deleted, but invoiced bookings can only be cancelled. See the Cancellations, Credits and Refunds mini-guide.

The **Advanced Bookings button** is left-over from an earlier version of SuperFox, some people still use it but it does not check the bookings that you make for errors. Please ignore it.

20. Printing Register Pages

You can print register pages from the register tab, or the calendar tab in the Booking Centre, lets see how.

Go > Home > Family Accounts > Booking Centre > go to the Register tab >
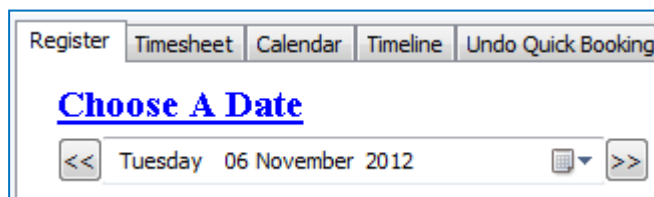
Choose a day with some bookings...

6 November 2012

Now click the Print Register button.

The Register Options pop-up will now appear. This gives you a wide choice of styles and filters to apply to your register page.

1.   The Date section allows you to print the register for a single day or the registers for a range of days.

   You can opt to show the children's ages and a small coloured mark relating indicating their Ofsted age band.

2.   You can choose different styles of register.

3.   You can filter the children to be included to match the group or class that you will be supervising.

4.   You can choose the register sort order to suit your own setting.

* IMPORTANT *

Registers can be produced for normal attendances, and also for sundry items like lunches.

• If a booked service has a duration it will appear on a normal register.

• If a booked service has no duration it will appear on sundry item registers

Click the **'OK' button** to see the register.
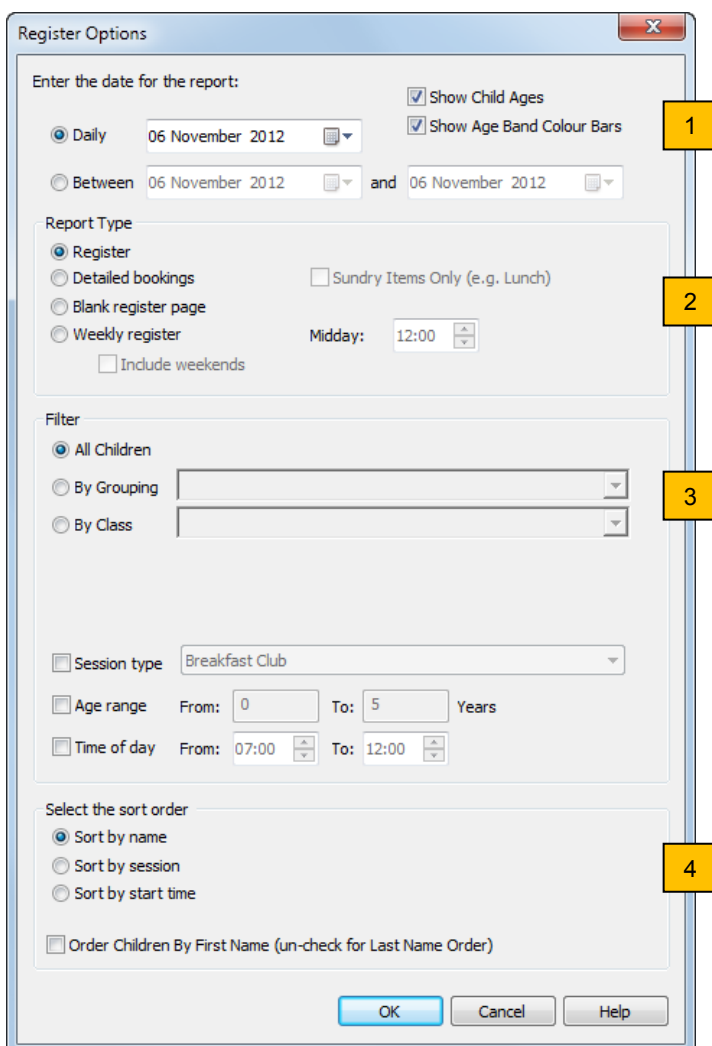
21. Register Types

Register

The default register type that we have just produced is an arrival and departure register.

This joins up the children's bookings to show their start and end times.

The register uses:

- The children's names, optional age and optional age band colour square.
  (Blue = Under 2's, Yellow = 2 year olds, Purple = 3-7 year olds, Green = 8+ years old.)

- Their expected arrival and departure times.

- Spaces to record actual arrival and departure times.

- Spaces to record an adult's signature if they are dropping off or picking up.

- Space to record the staff present.

If the child has a nickname set up in their details this will be shown on the register, e.g. 'Anteater, Anita **~ Annie**'. (Nicknames are agreed with parents and are used to distinguish between children with similar names.)

Detailed Bookings

The Detailed Bookings register type has similar content. There is one row per booking, so a child may have more than row for a single attendance. (E.g. free entitlement + nursery afternoon.)

There is a single column at the end of the row - for ticking if you needed.

Detailed Bookings - Sundry Items Option

If you select the Sundry Items Only option you can produce a register that only includes services without a duration.

This is well suited to showing children who will be having lunch or tea.

The sundry items only option is also available for the weekly register to see lunches (etc) for the week ahead.

Blank Register Pages

These are blank arrival and departure register pages with spaces to record children's names, start and end times and signatures from adults who drop off or pick up.

Weekly Register Pages

SuperFox includes a simple Weekly Register that shows if children are attending in the morning and afternoon.

You can set a time for Midday to suit he time that mornings end and afternoons start in your setting. You can also choose whether to include weekend days in the register.

The Weekly Register does not include the children's ages, but you can use the Sundry Items option to produce a weekly register of lunches. etc.

Weekly Sundry Items

Kidspace

Week Starting

Child

Barracuda, Jaquelin
Beetle, Ralph
Cod, Diana

Weekly Register

Kidspace

Week Starting: Monday, 5 November, 2012

Printed on: 16 Jul 2012
Page 1 of 3

Child	MON A	MON P	TUE A	TUE P	WED A	WED P	THU A	THU P	FRI A	FRI P	TOTALS am	TOTALS pm	TOTALS all
Ant, Adam									1		1	0	1
Ant, Peter									1		1	0	1
Anteater, Anita ~ Annie									1		1	0	1

The last page of the Weekly Register has two summary tables showing the attendances by age and the attendances by age band. (Under 2's, 2 year olds, 3 - 7 year olds, children aged 8+.)

Children Attending by Age

AGE	MON am	MON pm	TUE am	TUE pm	WED am	WED pm	THU am	THU pm	FRI am	FRI pm	TOTALS am	TOTALS pm	TOTALS all
0	3	2	4	3	3	5	2	4	1	1	13	15	28
1	5	3	4	2									
2	0	3	1	4									
3	5	10	2	7									
4	5	0	8	3									
5	0	0	0	0									
6	0	0	0	0									
7	0	0	0	0									
8+	0	0	0	0									

Children Attending by Age Range

AGES	MON am	MON pm	TUE am	TUE pm	WED am	WED pm	THU am	THU pm	FRI am	FRI pm	TOTALS am	TOTALS pm	TOTALS all
Under 2	8	5	8	5	6	8	6	8	5	4	33	30	63
2	0	3	1	4	3	1	3	1	2	0	9	9	18
3 to 7	10	10	10	10	16	11	14	9	9	8	59	48	107
8+	0	0	0	0	7	0	7	0	0	0	14	0	14
All	18	18	19	19	32	20	30	18	16	12	115	87	202

Register Filters

You can filter the register pages so that the children shown exactly match the children you are supervising.

This can be:

- All of the children
- A specific classroom
- An activity group
- A morning session

...and so on.

If you choose the **'Time of day'** filter the register will include children who are present during the selected time. The register pages will show the actual start and end times, which will not be truncated to match the selected times.

The filters that you have chosen will be displayed at the top of the register pages that are produced so there is no confusion about which children are included.

Register Sort Order

Remember that you can choose how the children's names are displayed on the register, beginning with their first name or their last name. (**'Ant, Adam'** or **'Adam Ant'**)

You can also choose whether to order the register by the child's name, booked session name or their start time. The exact sorting options available depend on the filters that are selected.

22. Calendars And Timelines

SuperFox has two calendars that provide a clear view of the children's bookings.

You can find these in the Family Centre and in the Booking Centre. Both work the same way except that the Family Centre calendar displays the bookings for a single family, the Booking Centre calendar shows all Families.

We will look at the Booking Centre: ***Go > Home > Family Accounts > Booking Centre > Calendar tab >***

There are 5 calendar views:
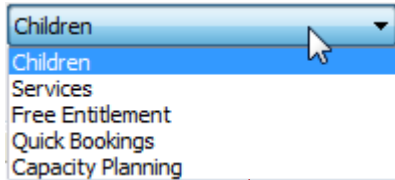
We can roll the calendar backwards and forwards with the arrow buttons

(A mouse wheel will also scroll it.)

The - / + buttons zoom in and out

Toggle Workflow hides the Workflow Manager to free up some screen space.

Toggle Sidebar brings the calendar sidebar into view (These are view specific)

The setting is closed on grey coloured days.

The calendar squares can be selected by clicking on them with a mouse in the same way that we practiced with the Quick Bookings earlier.

The days can be 'right-clicked' with a mouse to pop-up a menu to zoom in / out and run relevant reports.

Children Option

This shows the days that have children's bookings. If you use the sidebar you can show the bookings for all children or an individual child.

You can right-click on a day to zoom in or out around the day, and to print the register and age reports for the day.

Cancelling Children's Bookings

If you select one or more days the right click menu will have more options. One is to cancel the bookings. The bookings that are displayed are the ones that get cancelled and deleted:

- If you have all children shown you will cancel the entire day (snow closure, etc.).

- If you have one child shown you will only cancel their bookings.

* IMPORTANT * Read the Cancellations, credits and refunds mini guide before making any cancellations.

Services Option

This shows the days that services when have been booked. If you use the sidebar you can show the bookings for all services or an individual service.

Cancelling Service Bookings

You can select days in the same way as the Children option and you will be able to use the right-click menu to cancel bookings.

- If you have all services shown you will cancel the entire day (snow closure, etc.).

- If you have one service shown you will only cancel the bookings for that service. (Gym coach's broken leg.)

Free Entitlement Option

This shows the days where the Free Entitlement is in use.

The most useful view is monthly where the days show the number of hours used. If you use the sidebar t select an individual child you can instantly see the hours a child has used during the month.

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
October 1	2 5.00	3	4 5.00	5	6 / 7
8	9 5.00	10	11 5.00	12	13 / 14

Quick Bookings Option   We have already looked at Quick bookings in detail.

Capacity Planning Option

This view looks like the Children option. You can select a range of days and right-click to see if you have space to accept a booking for a child of a given age or in a given class.

Children's Timelines
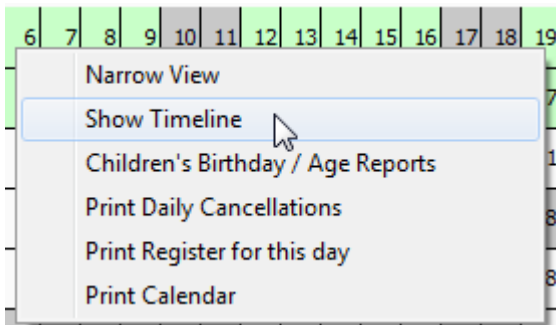
The timeline is a horizontal bar chart that clearly shows what the children are doing during the day.

The quickest way to display a day's timeline is to:

- Right-click on the day in the Children's calendar
- Choose 'Show Timeline' from the pop-up menu.

You will be taken to the nearest Timeline tab for that day.
(Here we chose 6th November 2012.)

The **top** part of the timeline display has time bars that show the children's attendances through the day. If you roll your mouse pointer over the bars the booing details will pop into view in a small box.

The **bottom** of the timeline display has five rows showing the total children attending at different times of day by age band. The top section will scroll if it becomes too long to keep the lower totals section in view.

You can move backwards and forwards using the arrows

>> = 1 week
> = 1 day

You can filter by class

(Toggle the Workflow Manager off to save space.)

You can display the Timeline sidebar for display options and to switch on staff and capacity.
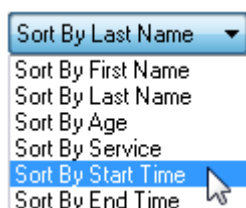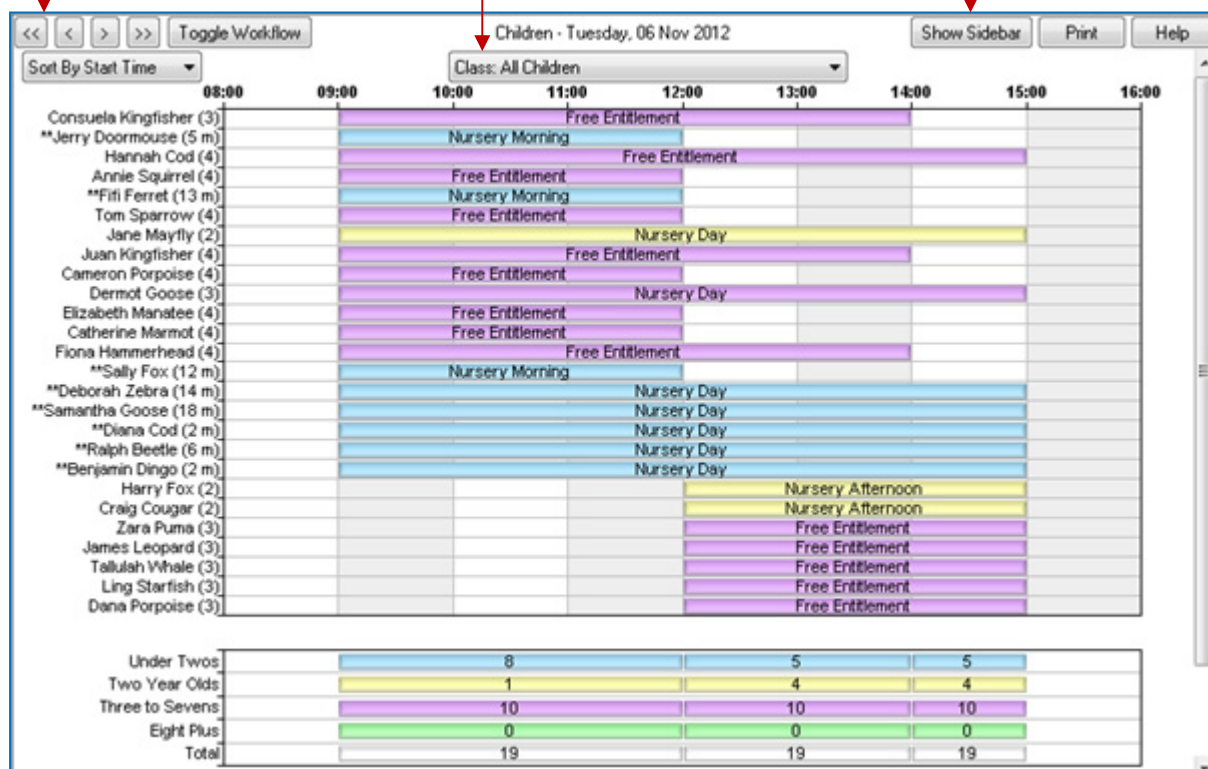
The drop-down list near the top left corner allows you to sort the bars in the top section.

- If you are using the timeline to compliment a colour coded register page choose the same name order that you used on the register pages.

- If you are using the timeline to help with room planning use a time, age or service order. This will make the step changes in occupancy very obvious.

Children's names are displayed in months up to 24 months of age, and in years for older children. Children with ages in months are highlighted with a double asterisk**

**Ralph Beetle (6 m)	
**Diana Cod (2 m)	
Hannah Cod (4)	
Craig Cougar (2)	

The colours used show the children's ages as shown below. These colours match the optional coloured squares on the register pages.

Under Twos	8	5	5
Two Year Olds	1	4	4
Three to Sevens	10	10	10
Eight Plus	0	0	0
Total	19	19	19

The children's timeline sidebar has two tabs. The first tab allows you to choose the times covered by the display.

Timeline Options	Ratios / Capacity

Select timeline options:

View Style: Entire Width

Timeline Range

Start Time: 09:00   End Time: 15:00

Reset (8am - 6pm)

Staff Ratio Options:

☑ Show Staff Ratios
☐ Show Capacity Spaces

◉ Simple Ratios
◯ Cascading Ratios
◯ Decimal Ratios

Staff to Child Ratio (3 to 7s)
◉ 1 : 8   ◯ 1 : 13

The second tab can add staff number and capacity guidance to the timeline. You can display results for simple age segregated rooms and mixed rooms calculated with either the cascading or decimal (points) scheme.

Staff Required are indicated in (brackets)

Under Twos	8 (3)	5 (2)	5 (2)
Two Year Olds	1	4 (1)	4 (1)
Three to Sevens	10 (2)	10 (2)	10 (2)
Eight Plus	0	0	0
Total	19 (5)	19 (5)	19 (5)

Spare Capacity is shown after the number of children booked in, i.e. Booked + spare in this age band

Under Twos	8 + 1	5 + 2	5 + 2
Two Year Olds	1 + 2	4 + 3	4 + 3
Three to Sevens	10 + 6	10 + 7	10 + 7
Eight Plus	0 + 7	0 + 7	0 + 7
Total	19	19	19

* IMPORTANT * Staff and capacity numbers are only provided for guidance. You should always check the results.

23. Recording Payments Received From Families

We need to record the payments received from families before invoicing.

Go > Home > Family Accounts > Payments Received >

(If you charge for your services but don't collect the money yourselves you can produce invoices but with the balances carried forward disabled. See the Invoicing mini guide to find out more.)

To enter a payment received:

- Click on the next blank 'Current Payments' row.
- Enter the details of the payment in the Add New data section below.
- Click 'Save' to save the payment received.

If you want to record a refund (giving money to the family, rather than a making a credit) tick **'Make this a Refund'**. Enter the refund as a normal positive amount, the program will add the '-' sign.

Ignore the **Reconcile and Transfer** button for now. You should read the 'Setting Finances Tutorial before clicking this button, it is used to reconcile the payments received and transfer them to the management accounts.

The View Current Payments List

Current payments only appear in the displayed list until they have appeared on an invoice. This keeps the list short and relevant to the payments still being processed. When a payment has appeared on an invoice, bank summary or voucher summary you will not be able to edit it. You can still see all of the payments received using:

Home > Family Accounts > View A Family's Accounts >

Bank Paying-In Summary

You can produce a summary of the payments received to help with your trip to the bank. When you need to fill in the paying-in slip run this report:

Go > Home > Family Accounts >
Bank Paying In Summary >

Click on the Add button and enter your bank run date together with a short description. This finds all of the payments received that have not yet been on a paying-in report up to and including your chosen date.

This is a handy way to check the payments received agree with the money going to the bank. There is a section below this that has a summary of other payments received (BACS, etc) for to help with bank reconciliation.

(Vouchers are not included here, they have their own report.)

Bank Run Report

Kidspace

Paid into Floyd's bank by Peter Panda

Report date: 18 June 2012 14:01:04

Bank Run Date: 21 December 2012   Page 1 of 1

Cash

Date	Name	Description	Amount
07-Dec-2012	Dr S. Coral (Rocky Bottom)		£8.00
12-Dec-2012	Mrs S. Bear (15 River Dale)		£32.00
12-Dec-2012	Mrs D. Dingo (Old Kennel)		£8.00
12-Dec-2012	Mrs C. Dolphin (99 Seaview Lane)		£8.00
		Subtotal:	£56.00

Cheques

Date	Name	Description	Amount
06-Dec-2012	Miss M. Ant (1 The Hill)		£48.00
17-Dec-2012	Mr P. Anteater (4 Hillside Drive)		£48.00
19-Dec-2012	Mrs T. Cod (109 Main Street)		£282.00
		Subtotal:	£378.00
		Total Cash and Cheques:	£434.00
		Total Number of Cheques:	3

Voucher Summary

You can produce a similar summary of vouchers received to help you reconcile them to your bank statement.

Home > Family Accounts > Voucher Summary >

24. Invoices

Invoices are always created in the Family Accounts section of the program:

Go > Home > Family Accounts > Statements / Invoices >

This form shows a list of invoice batches already created together with a short description of each batch.

Creating Invoice Batches

When you create an invoice batch you will be asked to provide a cut-off date for the invoice.

If you are charging in advance for any services you should usually make the cut-off date the same as the charge date used for the advance bookings.

* IMPORTANT * The new invoice will include all currently un-invoiced bookings that have charge dates up to and including the cut-off date.

Example:

1. Click on the **Add button** to add a new invoice batch

2. Choose a cut-off date of **30th November 2012**.

3. You can add a description for your reference if that is useful.

4. Click the OK button to create the new batch and add it to the Invoice Batches list.

   (This takes a few seconds and a green progress bar will be displayed while the program is busy.)
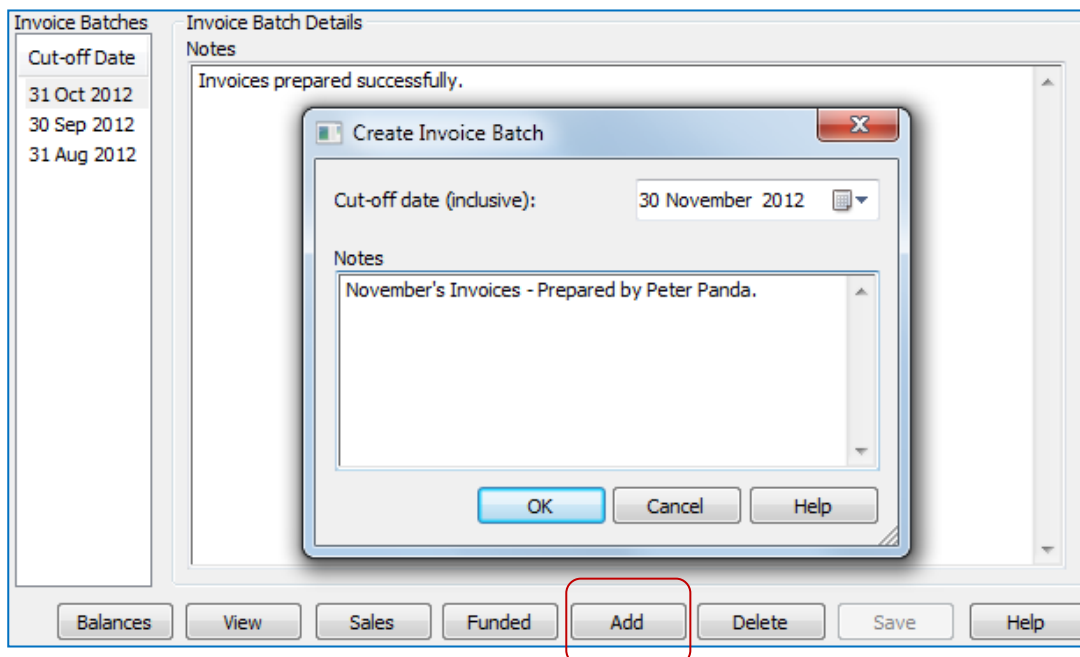
In this example the bookings were made using 'Monthly In Advance (Last day)' pre-calculated charge dates.

This means that our end of November invoice batch will include the advance bookings for December 2012, and any arrears charges for 30th November 2012 or earlier that have not yet been invoiced.

Viewing The Invoices

Each invoice batch contains invoices for all of the account holders. With our new 30th November 2012 invoice batch selected click on the '**View**' button.

The Invoice Batch Options form will pop-up allowing you to choose:

1. Which accounts to view.

   (An active account is one where there is some booking or payment activity.)

2. A title to appear at the top of the reports.

   (Statement, Invoice, Your Bill, etc.)

3. The Report Style.

The three report styles show different levels of detail.

All three styles have itemized charges showing:

- Paid bookings
- Free Entitlement use
- Sundry Items

(Summary By Service is the most compact.)

Choose the default options shown above and click the '**OK**' button. The invoices will now be displayed.

When the invoices appear find and click the Group Tree button at the top of the report. This displays a list of the invoice recipients

Click on Miss M Ant and use the arrow keys on your keyboard to move up and down the invoices in the batch. Stop at the Barracuda family.

Tip! It is always a good idea to quickly check all of the invoices in this way before printing.

How Invoices Are Laid Out

A typical invoice looks like this fully itemized invoice for the Barracuda family.

Title

Statement

Window Envelope Format Letterhead

Mrs L. Barracuda
54 Deep Blue Drive
Foxholes
Anytown
Northumberland
AA1 9ZZ

Kidspace
13 River Dale
Foxholes
Anytown
Northumberland
AA1 9ZZ
Tel: 01234 567890

OFSTED:	DEMO - NOT FOR USE
Company No:	DEMO - NOT FOR USE
Charity No:	DEMO - NOT FOR USE
Prepared to:	30 November 2012
Number:	138

Page 1 of 1

Introduction Custom Text

Thank you for using Kidspace.

Your account summary

Date		Paid	Charges	Balance
	Balance brought forward			£106.00
19-Nov-2012	BACS	£102.00		£4.00
30-Nov-2012	New charges		£78.00	£82.00
	New account balance			£82.00

Account Summary

Payment due is £82.00

Here is how we calculated the new charges   (If shown, C> = Subsequently Cancelled)

		Items	Hours	(Free)	Service	Amount
Jaqueline Barracuda						
Mon 03-Dec-2012	Jaqueline Barracuda	1.00			Late Lunch	£2.00
Mon 03-Dec-2012	Jaqueline Barracuda			6.00	Free Entitlement	£0.00
Mon 10-Dec-2012	Jaqueline Barracuda	1.00			Late Lunch	£2.00
Mon 10-Dec-2012	Jaqueline Barracuda			6.00	Free Entitlement	£0.00
Mon 17-Dec-2012	Jaqueline Barracuda	1.00			Late Lunch	£2.00
Mon 17-Dec-2012	Jaqueline Barracuda			6.00	Free Entitlement	£0.00
	Jaqueline Barracuda Totals:	3.00	0.00	18.00		£6.00
Kelly Barracuda						
Wed 05-Dec-2012	Kelly Barracuda		3.00		Nursery Morning	£12.00
Thu 06-Dec-2012	Kelly Barracuda		3.00		Nursery Morning	£12.00
Wed 12-Dec-2012	Kelly Barracuda		3.00		Nursery Morning	£12.00
Thu 13-Dec-2012	Kelly Barracuda		3.00		Nursery Morning	£12.00
Wed 19-Dec-2012	Kelly Barracuda		3.00		Nursery Morning	£12.00
Thu 20-Dec-2012	Kelly Barracuda		3.00		Nursery Morning	£12.00
	Kelly Barracuda Totals:	0.00	18.00	0.00		£72.00
	Totals:	3.00	18.00	18.00	Total new charges:	£78.00

Charges itemized by sundry items, paid hours and free entitlement hours

If you have any questions about this statement please call us on: 01234 567890.
Please make any cheques payable to: 'Kidspace Limited'.

End Note Custom Text

Custom Text

The Introductory text and End Note text can be changed to meet your own need in:

Home > Setting Details > Courtesy Letter Text > Statements / Invoices >

By default the introductory text is intended to say something like 'Thank you for using us.'

The End Note text should tell the account holder what to do next. You could even type in a dotted line and the text to make a small tear-off slip.

The Account Summary

The top of the invoice shows how much the account holder owes, here is the summary for the Ferret family.

Your account summary				
Date		**Paid**	**Charges**	**Balance**
	Balance brought forward			£126.00
07-Nov-2012	Cheque - Cheque from Mr Filmore Ferret	£98.00		£28.00
30-Nov-2012	New charges		£84.00	£112.00
	New account balance			£112.00

Payment due is £112.00

Note that the payments received description appears here, so be careful what you type!

If no payment is due, or the account is in credit the text at the end of the account summary will say so.

Report Styles

The three report styles differ only in the presentation of the charge section of the invoice. Choose the most detailed style that will fit on a single side of paper for your setting.

Fully Itemized

This is the most detailed option. This style has one line for each service booked on each day. (See the Barracuda family invoice on the previous page for an example.)

Summary By Service

This is the shortest invoice format and is the best choice for people invoicing over longer periods of time.

This style is still itemized, but just has a one line for each type of service used by a child over the period. Here are the Barracuda family charges in this style.

Here is how we calculated the new charges						
Quantity / Service		**Items**	**Hours**	**(Free)**		**Amount**
Jaqueline Barracuda						
18.00	Free Entitlement	0.00	0.00	18.00		£0.00
3.00	Late Lunch	3.00	0.00	0.00		£6.00
	Jaqueline Barracuda Totals:	3.00	0.00	18.00		£6.00
Kelly Barracuda						
6.00	Nursery Morning	0.00	18.00	0.00		£72.00
	Kelly Barracuda Totals:	0.00	18.00	0.00		£72.00
	Totals:	3.00	18.00	18.00	Total new charges:	£78.00

Daily Information

This is a mid-sized format. This report style looks like the Fully Itemized style, but there is just one line per day for per child. The child's total Free Entitlement hours, paid hours and sundry items are all shown for the day.

Free Entitlements

The invoice report always displays booked free entitlements as zero price in the invoice 'Amount' column.

Items	Hours	(Free)	Service	Amount
1.00			Late Lunch	£2.00
		6.00	Free Entitlement	£0.00
1.00			Late Lunch	£2.00
		6.00	Free Entitlement	£0.00
1.00			Late Lunch	£2.00
		6.00	Free Entitlement	£0.00
3.00	0.00	18.00		£6.00

The total number of entitlement hours booked is also shown on the invoice so the families are clear about how much free entitlement they have used during the invoice period.

Invoiced Payments Received and Bookings Are Locked

Bookings and payments received that have been included in the invoice batch can no longer be edited. This prevents the invoices given to parents from getting out of step with the family accounts in SuperFox.

Tip! If you find an error in a payment received or a booking on a new invoice batch the quickest way to correct it is usually to delete the invoice batch, edit the payment received and then re-create the invoice batch.

Payments received may also be locked because they appear on a Bank Paying-In Summary or a Voucher Summary. (This is shown in the B/V column of the Payments Received form.)

Quiz!

Now that we have had a look at the 30th November 2012 invoices let's answer a few short questions to check our understanding.

Q1. How much does the Barracuda family owe?

Q2. How much does the Porpoise Family owe and why?

Q3. How many hours of Free Entitlement did Rose Coypu use?

Q4. How much does the Leopard family owe?

Q5. How much does the Squirrel family owe?

Q6. Which voucher company has the Wombat family been using?

Q7. What did we charge Mrs. Doormouse for late payment?

Q8. How did the Goose family pay us last time?

A1.   The Barracuda family owes £82.00

A2.   The Porpoise family owes £5 for Cameron's Sun Hat

A3.   Rose Coypu used 30 hours of Free Entitlement

A4.   Nothing. The Leopard family started with a zero balance and only used the Free Entitlement.

A5.   Nothing. The Squirrels are £30 in credit.

A6.   The Wombat family has been using Busy Termites vouchers.

A7.   We made a £5.00 charge against the account holder (we will learn how on pages 54 & 55).

A8.   Gold bullion, just to show we can! (This was entered with payment method 'Other'.)

Invoice Summary Reports

You can run three additional reports for each invoice batch that you create. Instead of using the View button.

- Balances   -   This shows all of the account balances in the invoice batch.
- Sales   -   This shows all of the new charges to accounts in the invoice batch.
- Funded   -   This shows the value of free entitlement bookings if you were able to give these services a price when you set them up in Setting Details

These report are all plainly formatted, which makes them suitable to save in a spreadsheet format for your own use.

Invoice Numbers

You can optionally set up the invoice numbers to continue from your existing system. To do this:

Go > Home > Setting Details > Setting Details >
Invoice Offset button >
You can:

- Start the SuperFox invoices from 1, or
- Match the first or most SuperFox to an number form your existing system

25. Credit Control And Reminders

SuperFox can produce a simple graph that gives you a clear view of the amount of outstanding invoiced customer debt.

The report displays the debt by age to identify the accounts that are becoming late. You can choose the age columns to suit your own setting's payment policy.

The first column shows current invoice debt, which is of no real concern, but if money is owed in the subsequent columns then these debts may need to be chased if a payment plan has not already been agreed.

Family Accounts
Credit Control Report
Kidspace

Report for 30 Nov 2012

Thirty Day Split on 30, 60 and 90 Days

Printed on 19 Jun 2012
Page 1 of 2

Outstanding Invoiced Debt

Details

Customer Name	Age<=30	30<Age<=60	60<Age<=90	Age>90	Total
Mrs A. Mayfly (8 Bankside)	£239.00	£317.00	£312.00	£312.00	£1,180.00
Mrs A. Doormouse (150 Main Street)	£110.00	£145.00	£140.00	£151.00	£546.00
Mrs H. Hedgehog (87 Leafy Lane)	£72.00	£96.00	£96.00	£96.00	£360.00
Mrs R. Goose (The Pond)	£468.00	£104.00	£0.00	£0.00	£572.00
etc...					
Dr S. Coral (Rocky Bottom)	£6.00	£0.00	£0.00	£0.00	£6.00
Mrs F. Porpoise (9 Deep Blue Drive)	£5.00	£0.00	£0.00	£0.00	£5.00
	£3,811.50	£1,034.00	£548.00	£559.00	£5,952.50

The report uses **all payments received**, and **invoiced charges only** up to the report date. (30 Nov 2012 here).

* IMPORTANT *   This is not an Aged Debtors report. SuperFox does not associate payments received with specific invoices. The debt age is calculated and it is a very good guide for internal use.
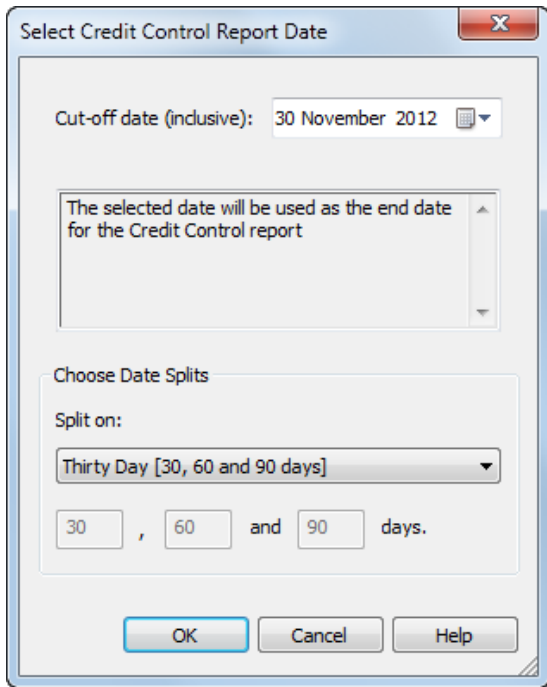
To produce a credit control graph:

Go > Home > Family Accounts > Credit Control Graph >

Enter the date to use for the report, your invoicing dates are generally a good choice. (Here we chose 30-Nov-2012)

Next choose an option for the date splits to use for the graph columns:

- Thirty Day   30, 60, 90 days
- Weekly   7, 14, 21 days
- Weekly Doubling   7, 14, 28 days
- Custom   Enter your own days

Tip! If you normally use 30 day splits you might want to consider using a custom split around February which always has less than 30 days.

Reminders

If you have identified anyone who should receive a reminder SuperFox can generate a concise reminder:

Go > Home > Family Accounts > Late Fees / Reminders > click on the Add Button

A pop up will appear - like the one above - asking you to select a reminder date. (We used 30 Nov 2012 again.)

Choose your usual date split and when you click 'OK' the age columns will appear on the Reminder Selection form.

Name	Age<=30	30<Age<=60	60<Age<=90	Age>=90	Total
Mayfly, Mrs Alison (8 Bankside)	£239.00	£317.00	£312.00	£312.00	£1,180.00
Doormouse, Mrs Amanda (150 ...	£110.00	£145.00	£140.00	£151.00	£546.00
Hedgehog, Mrs Harriet (87 Leaf...	£72.00	£96.00	£96.00	£96.00	£360.00
Goose, Mrs Rebecca (The Pond)	£468.00	£104.00	£0.00	£0.00	£572.00
Dingo, Mrs Dee (Old Kennel)	£306.00	£76.00	£0.00	£0.00	£382.00
Cod, Mrs Tracey (109 Main Street)	£396.00	£52.00	£0.00	£0.00	£448.00
Zebra, Miss Nikki (19 Green Lane)	£312.00	£52.00	£0.00	£0.00	£364.00
Fox, Mrs Alison (16 Hillside)	£144.00	£48.00	£0.00	£0.00	£192.00
Wombat, Miss Wendy (27 Banks...	£234.00	£46.00	£0.00	£0.00	£280.00
Ferret, Mrs Fiona (92 Leafy Lane)	£84.00	£28.00	£0.00	£0.00	£112.00
Cougar, Miss Catherine (30 The...	£306.00	£24.00	£0.00	£0.00	£330.00
Halibut, Mrs Phillipa (Captain's L...	£66.00	£22.00	£0.00	£0.00	£88.00
Tapir, Mrs Tamsin (25 Leafy Lane)	£24.00	£20.00	£0.00	£0.00	£44.00
Barracuda, Mrs Louise (54 Deep...	£78.00	£4.00	£0.00	£0.00	£82.00
Beetle, Mrs Alice (8 Woodside)	£258.00	£0.00	£0.00	£0.00	£258.00

Select the names to receive reminders in the usual way with the mouse and the Shift or Ctrl keys on your keyboard.

When you choose the people to receive reminders omit the following:

- People with current debt only (first column only).
- People who have already agreed a payment plan.
- Discretionary exceptions, for example families with recent bereavements.

When you have made your selection and pressed 'OK' a reminder batch will be created, just like an invoice batch. Keep the batches as you will need to use the reminders if you have to pursue payment in court.

A typical reminder is shown below. It looks deliberately impersonal and simply states the entire amount due. The amount is made up of all of the **invoiced** charges, less all payments received up to and including the reminder date.

The reminder text can be customized in: *Go > Setting Details > Courtesy Letter Text > Reminders >*

The default text simply asks for payment of the full balance. You should change this to match your payment policy, e.g. it might invite the customer to arrange a payment plan.

The End Note text says how to get in touch and to disregard if a payment has been sent in the last seven days. (People will sometimes send a cheque on receipt of the reminder and this helps them to save face.)

26. Viewing A Family's Accounts

Go > Home > Family Accounts > View A Family's Accounts >

This is the best place to get a complete view of a family's account and the first place to come to deal with account queries. (There is a version of this form in the Family Centre > Family Account tab.)

The form is very simple to use:

1.   Start by setting a date range. (We chose 01-Aug-2012 to 31-Jul-2013.)

2.   Now click on the account holder to view in the Account Holders List.

3.   You can sort the listed transactions by clicking on the column headers as usual.

4.   If you select one or more rows the total selected payments received and charges will appear under the list

The buttons below are:

Manage Account Items	-	Make credits or charges to an **account holder** rather than a child. (e.g. **Opening Balances**, late payment fines)
Account Balance	-	Find account balances on any day using booking charge dates or delivery dates (e.g. for payment plans: what would be invoiced, what has actually been used)
Account Receipts	-	Print out payments received evidence.
Account Usage	-	Print out childcare usage (e.g. for working tax credits evidence).
View Children	-	Flips the form into 'child' view, listing out children's usage as shown below. (Children are not account holders, only the Account Usage report is active.)

Opening Balances, Account Holder Charges And Credits

Opening account balances are entered from View A family's Accounts.

Manage Account Items   Enter an appropriate date range at the top of the form and click the Manage Account Items button. A small pop-up form will appear:

To apply a charge or opening balance where the account holder owes us money, click the 'Apply Charge' button.

To apply a credit or opening balance where we owe the account holder money, click the 'Apply Credit' button.

In either case supply a meaningful description of the charge or credit, a date on which it should appear in the account and an amount to charge or credit.

The account holder credits and charges appear on invoices as itemised arrears items in their own section called **'Account Holder Charges'**. They are displayed using the description that you entered, so be polite!

28. Free Entitlement Returns

SuperFox can produce four Free Entitlement reports that can help you make your Free Entitlement returns. They can be run from the Free Entitlement Calendar sidebar or from *Management Reports > Early Years Reports >*.

- **Free Entitlement Headcount** - Standard headcount return
- **Free Entitlement Check** - Long period use check (stretched entitlement)
- **Free Entitlement Usage Summary** - Number of children by hours used.
- **Early Years Census Pupil Data** - Pupil level data for the Early Years Census (Plain format to use or copy / paste into a spreadsheet)
- **Headcount Export (CSV)** - Exports a data file to return the Headcount electronically (Only available in some local authority areas)

Headcount Return

Let's produce a headcount return as an example:

>   *Go > Home > Management Reports > Early Years Reports >* (Milk Claims are here too.)

The headcount return asks for the birth date range of the eligible children and the period on which you wish to report..

The report adds up the Free Entitlement used by the children in the specified age range, in the same way that you would for your normal return. (You could use the birth date range to report separately on any two year old funding.)

(The program looks for the Free Entitlement tick in the booked services to identify Free Entitlement, so it is vitally important to have those services set up correctly before making the bookings.)

Local Authorities often have different methods for administering the funding, but most ask for an estimate at the beginning of a period and make a part payment of the estimated funding, followed by an accurate return and the balance of the funding due.

The data required for the return varies between local authorities.

(It is possible that your local authority will need less information.)

Free Entitlements
Headcount Summary

Kidspace

Birth date range. From: 1 January 2000 To: 20 June 2020
Usage date range. From: 20 June 2000 To: 20 June 2020

Legal Names Used *(Known-As Names are shown in italics if different)*

Report date: 20 June 2012
Page 1 of 4

Surname	Forename	Midname	Date of Birth	M/F	SEN	Eth	Funded Hours / By Day		Total Hrs	Address	Town of Birth / Other Providers
Ant	Adam		15 Aug 2007	M	N	WBRI	45.00	M 0.00 Tu 0.00 W 0.00 Th 0.00 F 45.00	45.00	1 The Hill West Wood Anytown Northumberland AA1 9ZZ	Anytown Happy Hippos

For each child included the return lists their legal name and any 'known-as' name in italics.

Surname	Forename	Midname
Pangolin	Anita	Rita
Anteater	*Anita*	*Rita*

Next we have the child's date of birth, gender, any Special Educational Needs status and their ethnicity code.

Date of Birth	M/F	SEN	Eth
15 Aug 2007	M	N	WBRI

Finally the return shows the children's total funded hours with a breakdown by weekday, their total hours, address, town or birth and the names of any other providers from their parental declaration.

Funded Hours / By Day		Total Hrs	Address	Town of Birth / Other Providers
45.00	M 0.00 Tu 0.00 W 0.00 Th 0.00 F 45.00	45.00	1 The Hill West Wood Anytown Northumberland AA1 9ZZ	Anytown Happy Hippos

If you choose the option to include children who did not use the Free Entitlement the report will include all children in the eligible age range.

0.00	M 0.00 Tu 0.00 W 0.00 Th 0.00 F 0.00	45.00	4 Hillside Drive Foxholes Anytown Northumberland AA1 9ZZ	Anytown

The white space below the printed totals is intended for you to enter your estimates if you would like to use the report as a working document to prepare the initial estimate.

Free Entitlement Check

The Free Entitlement Check allows you to report on the free entitlement used by the children over a longer timescale. You may find this helpful if you are using the stretched delivery.

(Children using the stretched delivery are labeled   *STR>*   in the report. There are two options.

Summary Only

You can produce a simple summary of the hours used between two dates with one row for each child. If you choose this option the report will include the hours used for the exact date range that you specify.

STR> = Stretched User							>> Childrens legal names are shown in italics if differe.
Summary Details							
Child	**Hours**	**Days**	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**
Adam Ant	24.00	8	0.00	0.00	0.00	0.00	24.00
etc.							
Tallulah Willow Whale	117.00	39	21.00	24.00	24.00	24.00	24.00
Total Funded Hours In This Report:	**2,005.00**						

Weekly Totals

You can also produce a week-by-week summary for each child. If you choose this option the report will report on the complete weeks that include the date range you specify.

James Leo Leopard	Total used: 117.00						
James Leo Leopard	09-Sep-2012	12.00	4		3.00	3.00	3.00	3.00
James Leo Leopard	16-Sep-2012	15.00	5	3.00	3.00	3.00	3.00	3.00
James Leo Leopard	23-Sep-2012	15.00	5	3.00	3.00	3.00	3.00	3.00
James Leo Leopard	30-Sep-2012	15.00	5	3.00	3.00	3.00	3.00	3.00
James Leo Leopard	07-Oct-2012	15.00	5	3.00	3.00	3.00	3.00	3.00
James Leo Leopard	14-Oct-2012	15.00	5	3.00	3.00	3.00	3.00	3.00
James Leo Leopard	21-Oct-2012	15.00	5	3.00	3.00	3.00	3.00	3.00
James Leo Leopard	28-Oct-2012	15.00	5	3.00	3.00	3.00	3.00	3.00
		117.00	39	21.00	24.00	24.00	24.00	24.00

Headcount Export (CSV)

This option will only be active if your local authority is using this type of return. You will be asked to specify the birth date range and usage date ranges as for the headcount return. You will also need to enter the name of the setting and the person making the return.

SuperFox will check the return data and pop up a list of warnings and errors.

Please check the list carefully. Some warnings may be okay (e.g. not all houses have house numbers) but some are not (e.g. no parental declaration seen).
If you find any errors correct them and run the export again.

29. Staff Details

Staff and volunteer details are stored in a large tabbed form: *Go > Home > Staff Details > Staff Details >*

The Staff Details section of the program is fully described in the Staff Details mini guide.

This form stores the following information:

General tab	-	Contact details, doctor, dentist and any medical notes.
Additional Details	-	Job title, key dates, HMRC information, CRB and Paediatric First Aid, Holiday year and allowance, carry forward / lieu days.
Work types	-	Pay rates, if any, to be used for this person.
Qualifications	-	Qualifications, Development courses, Baby experience.
Contacts	-	Emergency contact details.
Work Period	-	A note of any contracted hours and the associated pay amount.

This information allows you to produce a useful staff summary, staff emergency details, staff schedules and payslips and assign staff to be a key people for the children.

* IMPORTANT * You should also include information about your volunteers in this section.

30. Other Useful Parts Of The Program

Usage Reports

The management reports section has a collection of bar charts and pie charts that are very useful for management and marketing purposes.

Bar Charts

The Bar charts show the daily setting attendances for 30 days, 60 days, 20 weeks or a year.

- The bar charts show your bookings in terms of fees and in terms of hours of childcare provided.
- These will help you monitor the success of your services and they clearly highlight any developing trends.

The figures that produced the bars are also provided and can be saved to a spreadsheet.

Pie Charts

The pie charts show who is using the setting and what they are doing. This is a very good way to demonstrate the effectiveness of your equal opportunities policy, and it is essential marketing information.

FTE Bar Charts

This is similar to the standard bar chart option except that the two charts shown are:

- Full Time Equivalent attendance.
- Percentage Occupancy

These numbers are calculated using the registered places and the specified number of open hours on each day.

Staff Management

In addition to the staff details, SuperFox can also help you to track staff holidays, lieu days sickness, absence and appointments and track them in staff diaries and calendars.

You can also schedule the staff and produce gross pay statements.

Setting Finances

SuperFox has good management accounting functions and an advance financial planner.

You can produce easy-to-understand Cash Flow, Income and Expenditure, Profit and Loss, Capital and Revenue expense statements using your live or planning data.

Manage Your Data

If you can load different live databases from the Manage Your Data option in the Backup & Tutorial Data section.

You can move your files around here too. You may find this useful if you need to use data from a chain of settings.

31. Making A Start

The best way to get started with the program is to use it. When you have run through this tutorial you should consider shadowing your existing system for several families through a couple of invoicing cycles.
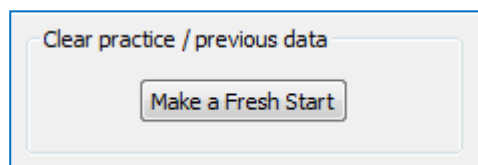
When you are confident that your bookings, invoices and returns are correct you can enter the remaining families and make a fresh start.

There is a Fresh Start option:

> **Go > Home > Backups & Tutorial Data > Manage Your Data > Make a Fresh Start button >**

Take a backup first!

Clear practice / previous data
Make a Fresh Start

This option will leave family details in place and it will erase all of your practice financial information. You can choose to keep or erase your services.

(You can make a mistake while you are learning without paying the price with your parents.)

If you are doing something for the first time take plenty of backups, especially if you are making cancellations. It is always easier to restore a backup than to undo your changes.

32. Program Updates

SuperFox is occasionally updated and you can download the updates from the web at: www.superfox.org.uk

You will find a link to the download in the 'Announcements' column on the home page.

* IMPORTANT *   Each update has an instruction note that you can read or download at the same time that you get the update. Please take the time to read the note before installing the update.

The computer running SuperFox does not need to have internet access, the download can be made from any other computer and then copied onto the SuperFox computer to be updated.

THIS IS THE END OF THE QUICK START TUTORIAL