Welcome to the SuperFox Quick Start Tutorial

This tutorial will help you become accustomed to SuperFox within a 3 hour training workshop. It will make it easy for you to get started with SuperFox and work with mini-guides that come with SuperFox later at your own pace.

This Tutorial is split into five sections:

Section 1 An introduction to SuperFox and a quick tour of the program, where to find help.

Section 2 We will be entering family details.

Section 3 Using the calendars and setting up your services.

Section 4 We will be entering some bookings, payments received and invoicing.

Section 5 Free Entitlements and Management Reports.

CONTENTS

“Quick Start” Section 1
INTRODUCTION TO SUPERFOX

SuperFox is a simple back-office administration program for childcare providers. To get a feel for SuperFox, we are going to start up SuperFox on your computer and take you through some sections of the program and look at some of the printed reports that SuperFox can produce.

1. Sequence that Information Goes In

When we set up SuperFox we will start by entering primary data about the setting, families, our staff and the services that we provide.

You will need to do this for your setting in this order too:

- Open the program and enter passwords.
- Enter setting details
- Enter staff details
- Enter family details
- Set up the services that we provide (care required).

2. Lets Start!

Go > Desktop > locate the SuperFox Program > double click

The SuperFox Login screen will appear.

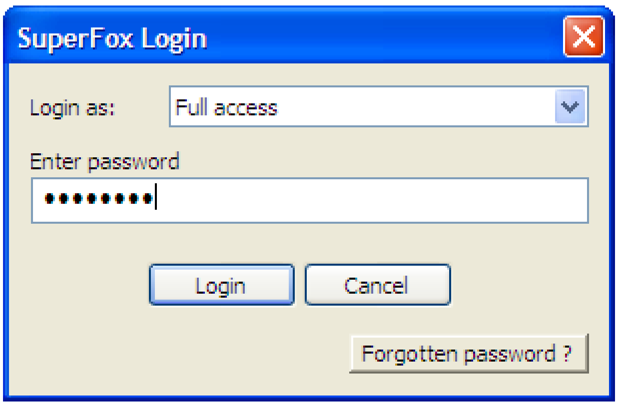
SuperFox uses two levels of Security: **Assistant Access** and **Full Access**. **Full Access** allows access to sensitive data such as management reports and pay information. **Assistant Access** gives access only to non-sensitive parts of the program that most staff might use for routine data entry or children’s reports.

First time you open the database default passwords will be set. These are as follows:

“quickfox” (all lower case) for **Assistant Access**

“superfox” (all lower case) for **Full Access**

Once you start to use SuperFox with real data you will need to change these passwords to retain the security of your sensitive information. We will do this in one of the next steps.



Click on drop down box beside Assistant Access > Choose “Full Access > Enter correct password > Login

For details on this and more about security see Passwords Mini Guide.

3. Throughout the tutorial you will see instructions that start:

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.

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.

Many references are made throughout this tutorial to the Help files. This will assist you get used to using HELP and/or the mini guides on an everyday basis for problem solving and to find out what else the program can do for you.

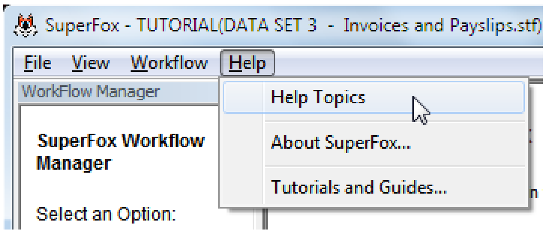
4. Where to find Help

There is a lot of very good help available with SuperFox.

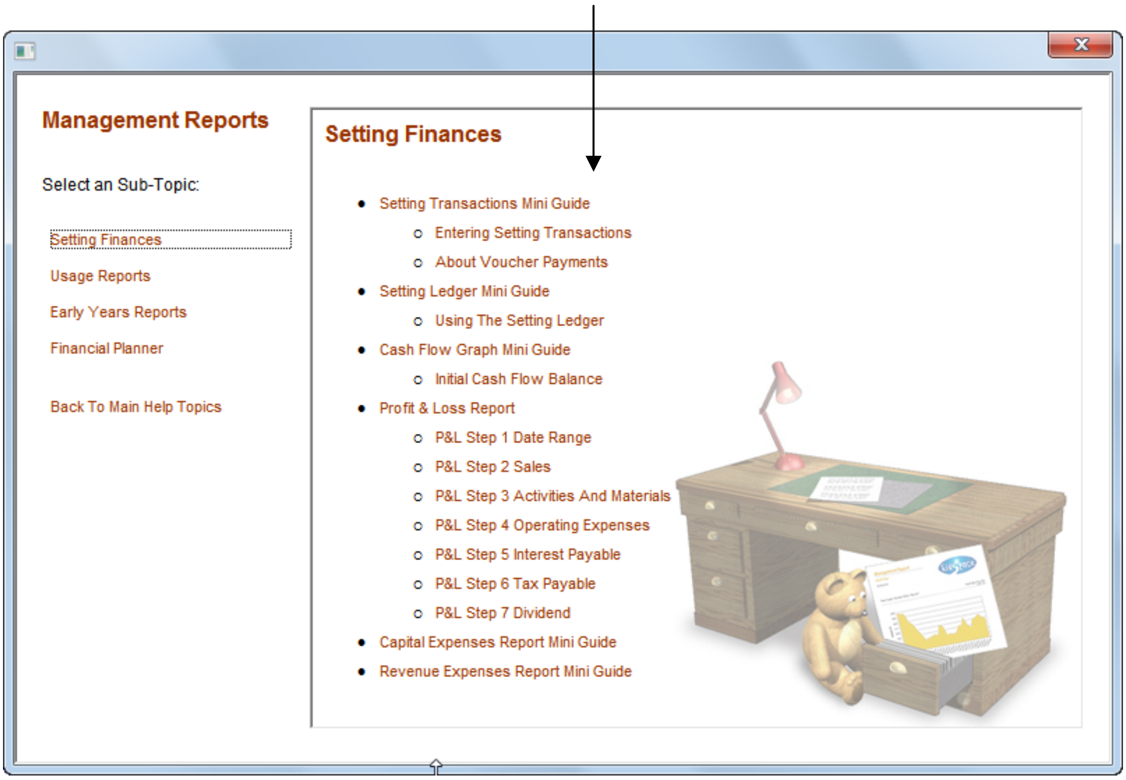
1) On-Screen Program Help.

   Nearly every form used by SuperFox also has a Help button. If you press a Help button it will take you straight to the help information that you need to use that form. The help is displayed in PDF format as this allows us to use nicely labelled diagrams and screen shots to explain how to use the different forms.

   You can browse all of the help topics from the drop-down menu at the top of the SuperFox window.



   This launches the Help browser. Click on a help topic on the left side of the browser to see the available help documents on the right hand side, here.



2) The Quickstart Tutorial

The Quickstart Tutorial is a good place to go for a basic reminder of how to use the program and to check the right order to set up the program.

3) Mini Guides

All major topics have their own manuals called mini guides. ***You can find the mini guides and a copy of this tutorial from any part of SuperFox in a section called***

Tutorials & Guides >

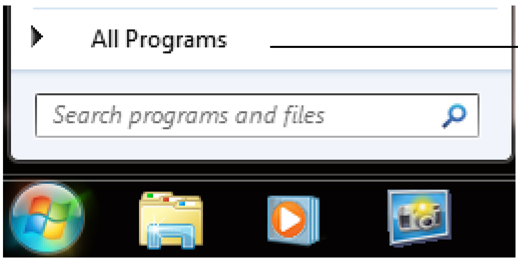
The guides give a more in-depth explanation about a wide variety of topics than is possible in the Tutorials, and they often contain worked examples. The guides in the ***MUST READ*** column are a must before starting work!

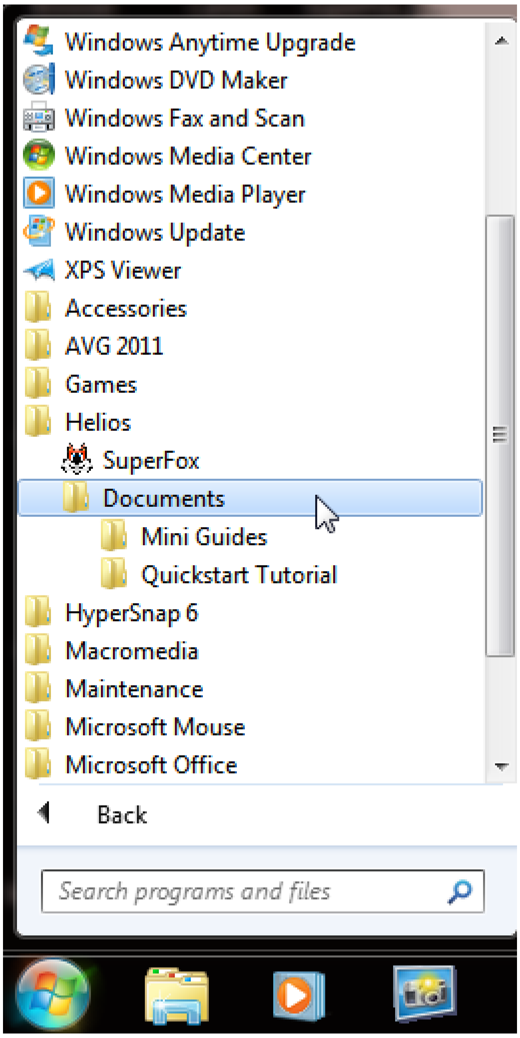
The Mini Guides and this tutorial do not assume that you are a computer expert! They always start with basic step-by-step instructions for each function in the program. If you are confident with a computer you can just skim through the more basic instructions.

4) Copies Of The Quickstart Tutorial And Mini Guides - The Windows Start Menu

The PDF help documents that are launched from help buttons and the Tutorials & Guides section of the program can be printed. They change occasionally and it is good to print as little as possible.

You can find also copies of the Tutorial and Mini Guides from the Windows Start menu. You will need a PDF reader such as Adobe's free Acrobat Reader installed on your computer to use these PDF documents. They are easy to find.





From the Windows Start menu at the lower right corner of your screen choose All Programs.

From the start menu go to:

All Programs > Helios > Documents >

You will see two folders that contain the Mini Guides and the Quickstart Tutorial. The documents are listed in these folders and will launch when clicked.

5. The SuperFox Main Controls

Now you have opened SuperFox have a look at the screen and find the following features:

a. **The Menu Bar**, and the following words on it

(1) **File** – allows you to exit the program (though clicking on the red X will do the same)

(2) **View** :

- will show/hide the Workflow Manager (the Workflow manager is the left hand window with brown words that allows you to access parts of SuperFox)
- will show hidden Child, Adult or Staff records that have been chosen to be hidden (removed from sight, rather than deleted.

(3) **Workflow** – clicking here will access all of the input Screens that SuperFox uses. It may be a little quicker to use this than the Workflow Manager screen.

(4) **Help** – your on screen help, divided into all the main sections that SuperFox covers. Remember - nearly all input screens have a "Help" button.

b. Within the **Workflow Manager** locate the Back/Fwd/Home buttons.

(1) To Hide the Workflow Manager: ***Menu Bar > View > Workflow Manager***

(2) To Show the Workflow Manager: ***Menu Bar > View > Workflow Manager***

(3) To get Back to the Welcome to SuperFox Screen: ***Click "Home" (bottom left of screen)***

(4) To Navigate around the SuperFox options in the Workflow manager:

- Click on the brown links (family details etc)
- or click on the Back or Fwd buttons
- or click on "Workflow" in the menu bar

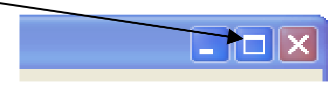
6. TIP – Find the HOME button and Use It

Click on the "HOME" button if you get lost. It will always take you back to the start menu. All the processes in bold and italics in these notes start with the "Home" button. I.e. ***Home > etc***

This will take you to the start screen shown above.

7. TIP – MAXIMISE!!

Make your on work area as big as possible. Click on the maximise button. It may make your screen bigger. If not don't worry, it's already as big as it will go.



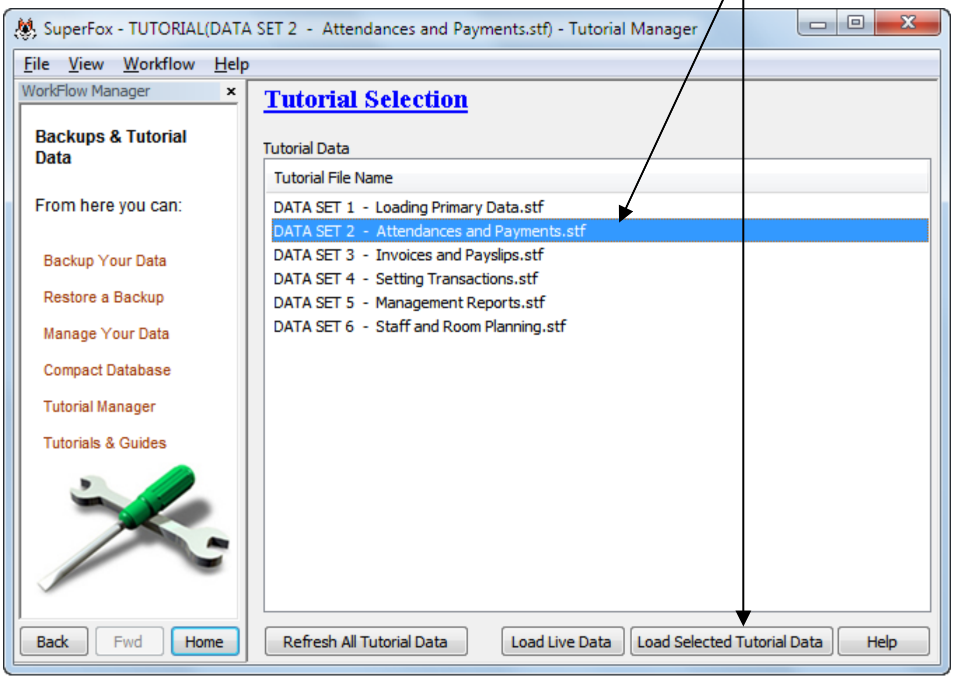
8. TIP – Drag The Corners To Make Small Screens Bigger

Many of the pop-up dialogs have quite a small size to work with very small screens. If you have room on your screen click and drag the bottom right corner to make the dialog bigger. In this case bigger is better!

9. Loading Tutorial Dataset 2

In order to prepare this tutorial you will need to load the correct dataset. Follow these instructions very carefully:

Home > Backups & Tutorial Data > Tutorial Manager > click on DATA SET 2 (so that it is highlighted - see the screen below) > click "Load Selected Tutorial Data"



When Dataset 2 is loaded the window title will change as shown above. Now you are ready to roll with Session 1. We will start by having a look to see how things appear in use.

(This tutorial uses Tutorial Datasets 2, 3 and 5. They all load in the same way. If you need to return to the live data just come back here and press the Load Live Data button.)

10. Using the Change Date Control

Many entries require the setting of a date, for example:

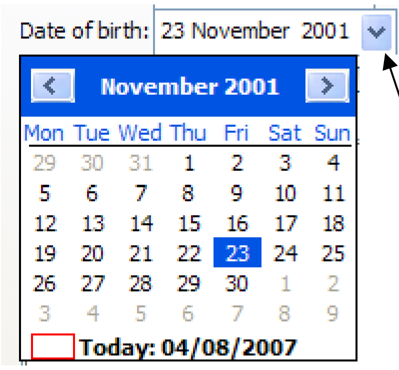
Home > Family Details > Children > click on a child's name and locate the control "Date of Birth"

There are several ways to use the date control:

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.

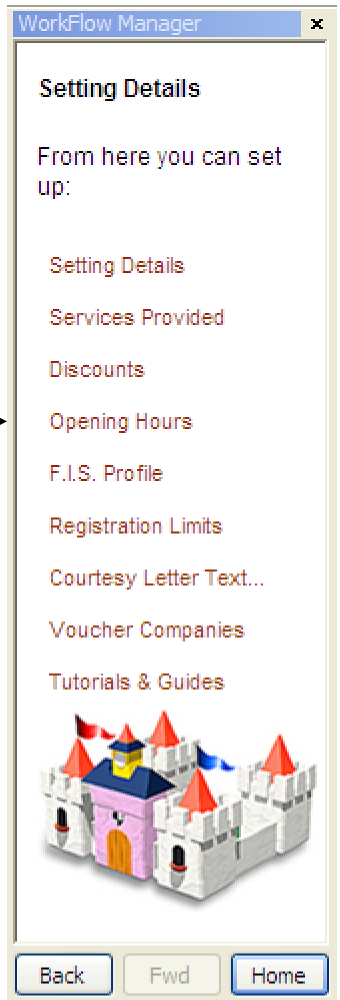
EXERCISES:

1. **Change the date just using the keyboard arrow keys.**
2. **Change the date by typing in numbers.**
3. **Change the date by using the drop down calendar.**

It is worth practicing with dates as you will be using them quite a lot.

11. Adding Setting Details

The first thing that you will want to do when setting up SuperFox is to enter some basic details about your setting. These details are all managed from the **Setting Details** part of the Workflow Manager, which looks like this:



Home > Setting Details >

This is where we will be setting up key information about our setting, services and discounts, our opening hours, Families Information Service information, our setting registration limits, some text we can use to customise invoices, reminders and payslips and contact details for any voucher companies that we use.

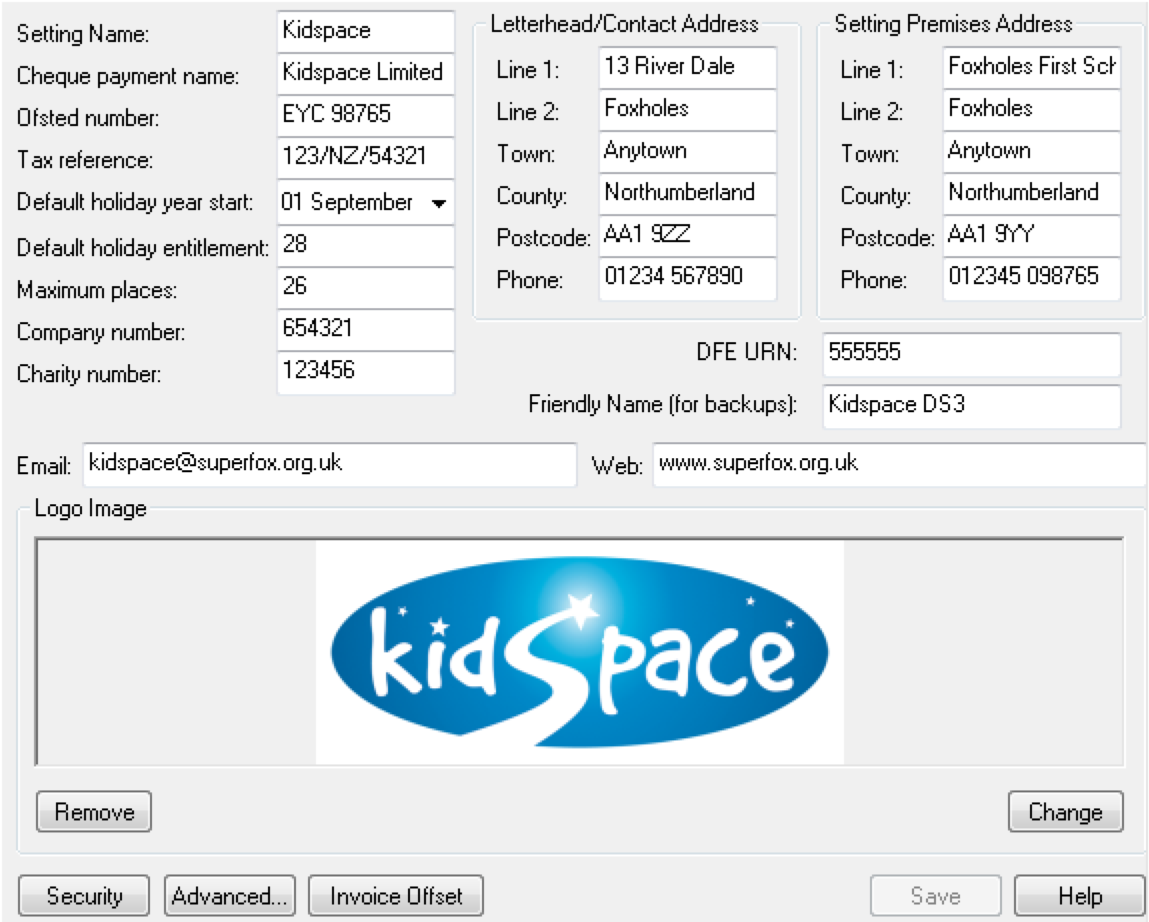
This information is already filled for our fictitious setting in Dataset 2.

Home > Setting Details > Setting Details >

We will have a quick look at this section.

You would use the Setting Details section of SuperFox to enter your setting name, some key reference numbers and the setting contact information and a friendly name four your setting's database file.

Remember to press ***Save*** to save your work.



You can optionally use the ***Change*** button to choose a logo for your letterhead. This is a nice touch and is easy to do. It is described in detail in the Mini Guide 'Creating a Logo File'.

The ***Security*** button is used to set new passwords. (See the Passwords Mini Guide.)

The ***Invoice Offset*** button is used to set an initial invoice number. (See the Invoicing Mini Guide.)

The ***Advanced…*** button is used to set up an advanced invoicing option and is not needed for most settings. (It is described in the Invoicing Mini Guide.)

Speed Tip – Use the Tab key to move around forms

- The quickest way to move to the next field on a form is to press the keyboard Tab key.
- The quickest way to move to the previous field on a form is to hold down the keyboard Shift key whilst pressing the keyboard Tab key.
- This is usually much faster than using the mouse and if you get into the habit of using the Tab key it can save you a lot of time when entering children's details.

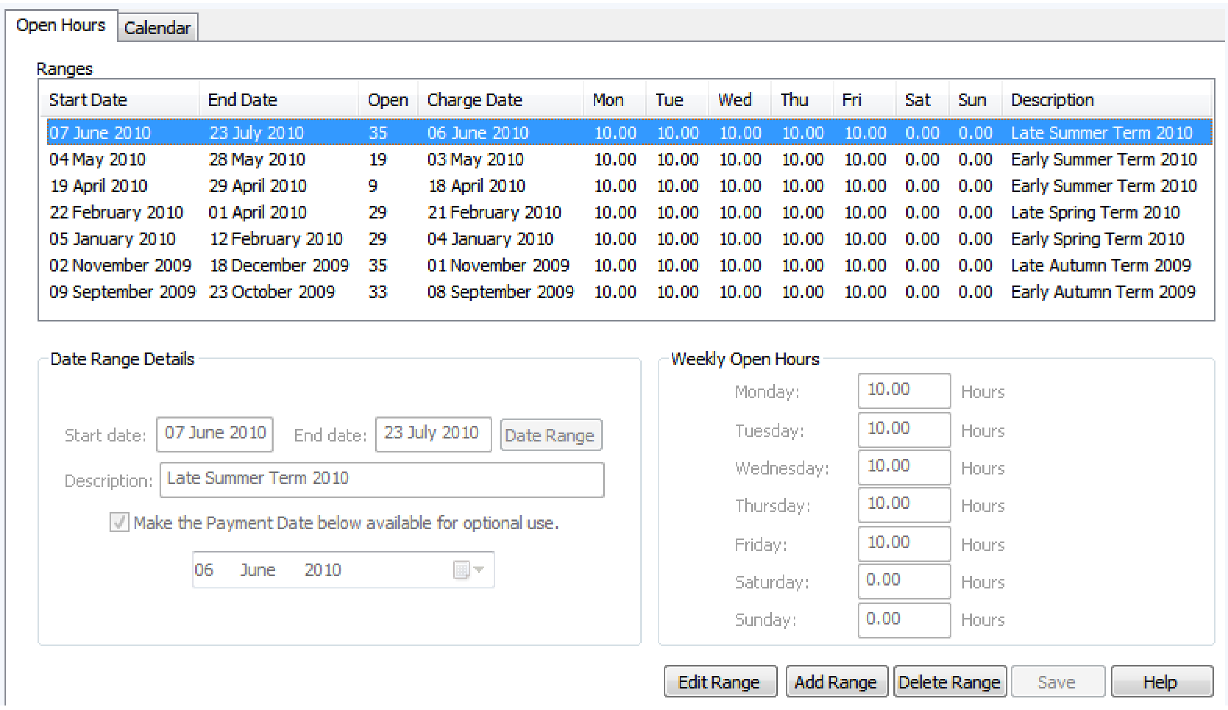
12. Setting Opening Hours

SuperFox needs to know about the days on which your setting is open. It uses this information to enter children's bookings and to prepare some management reports.

Home > Setting Details > Opening Hours >

This will take you to a tabbed form where our fictitious setting opening hours are set up for the year from September 2009 to July 2010. This is quite a big form and, if you have not already done so, this would be a good time to maximize the program.

The ***Open Hours tab*** is used to set up continuous date ranges that your setting is open. The ***View Calendar tab*** allows you to easily see the open days.



Start Date	End Date	Open	Charge Date	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Description
07 June 2010	23 July 2010	35	06 June 2010	10.00	10.00	10.00	10.00	10.00	0.00	0.00	Late Summer Term 2010
04 May 2010	28 May 2010	19	03 May 2010	10.00	10.00	10.00	10.00	10.00	0.00	0.00	Early Summer Term 2010
19 April 2010	29 April 2010	9	18 April 2010	10.00	10.00	10.00	10.00	10.00	0.00	0.00	Early Summer Term 2010
22 February 2010	01 April 2010	29	21 February 2010	10.00	10.00	10.00	10.00	10.00	0.00	0.00	Late Spring Term 2010
05 January 2010	12 February 2010	29	04 January 2010	10.00	10.00	10.00	10.00	10.00	0.00	0.00	Early Spring Term 2010
02 November 2009	18 December 2009	35	01 November 2009	10.00	10.00	10.00	10.00	10.00	0.00	0.00	Late Autumn Term 2009
09 September 2009	23 October 2009	33	08 September 2009	10.00	10.00	10.00	10.00	10.00	0.00	0.00	Early Autumn Term 2009

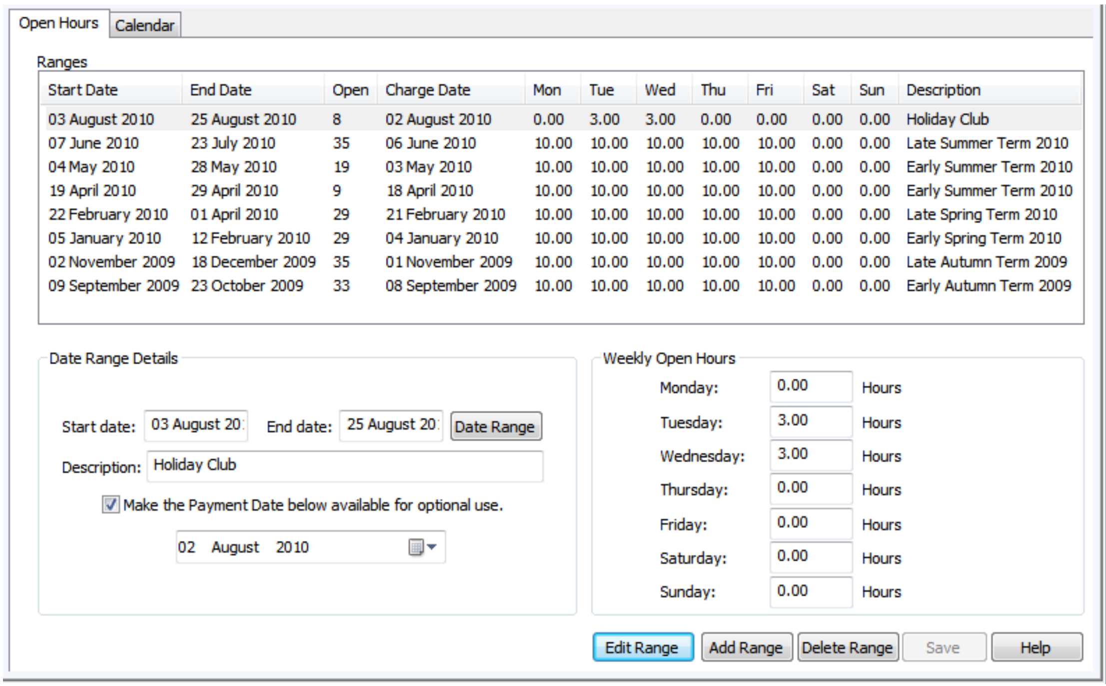
Each range is added as follows:

- Click the ***Add Range*** button.
- Click the ***Date Range*** button to specify the first and last dates in the range.
- Give the date range a meaningful description.
- Enter the number of hours that the setting will be open on each day of the week.
- For now ignore the 'Make Payment Date…' part, it is used for Termly / Half Termly advance charging, more details can be found in the Opening Hours Mini Guide.

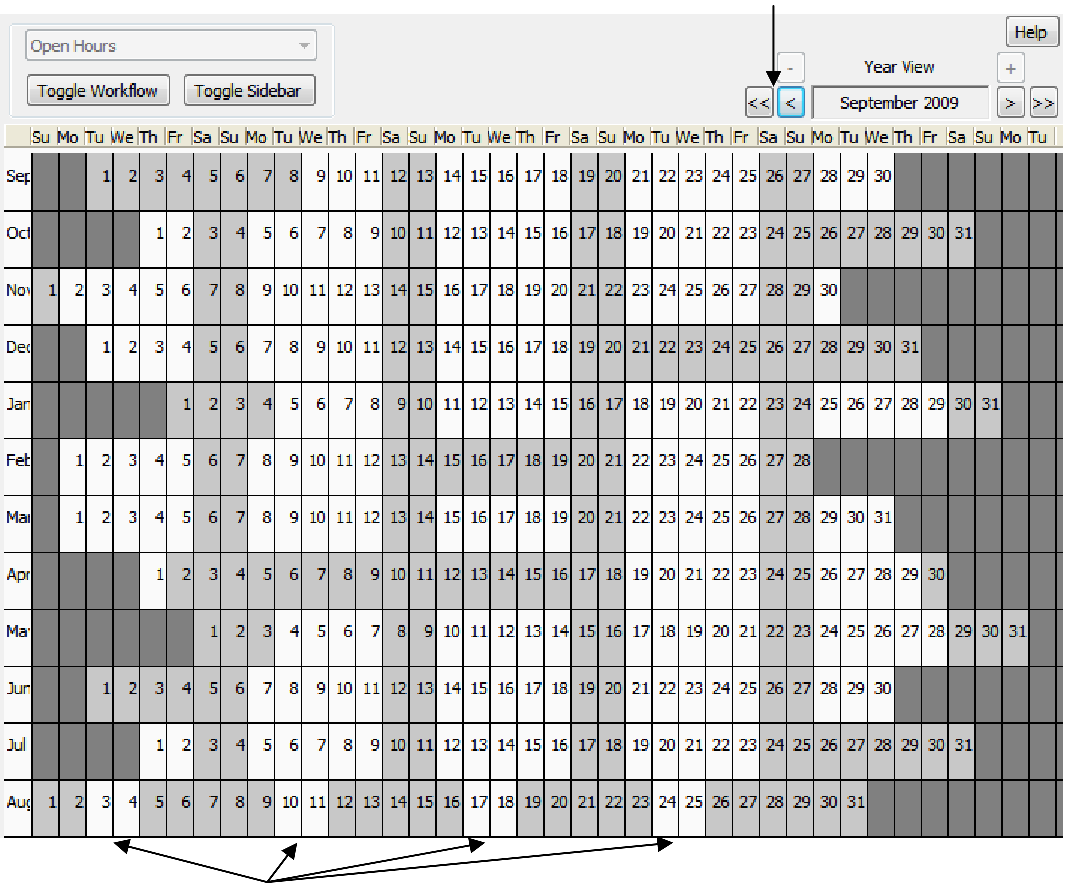
Exercise

Add a 'Holiday Club' date range running from 03-Aug-2010 to 25-Aug-2010. We will be open for just 3 hours on Tuesday and Wednesdays only. Press the ***Save*** button to save your work.

When you have finished the exercise the new date range should look like the picture on the next page.



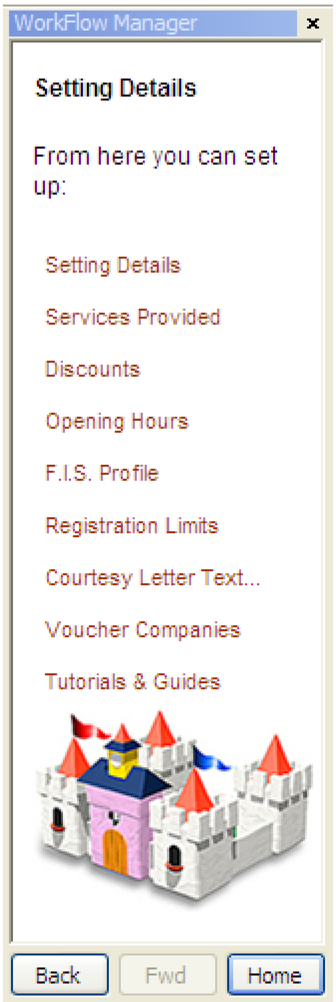
We can get a good view of the open days using the ***View Calendar*** tab and use the ***arrow buttons*** to roll the calendar forwards and backwards until it looks like this.



You can see the open days for our new holiday club here in August. (You can use the sidebar to show individual date ranges on the calendar.)

Note: When you have a closed day in the middle of a date range (e.g. a mid-range bank holiday you will need to define two date ranges either side of the closed date. For most setting that are aligned with school term dates this only usually happens around Easter.

In practice, setting up your opening hours is a small job that you will only need to do once a year.



The remaining setting details that we would add at this stage are very simple to set up and they are described in their own mini guides:

- **F.I.S. Profile**

  A summary of the setting information that can be sent to the Families Information Service and included in your welcome pack.

- **Registration limits**

  You can enter the overall number of children and any age specific number limits imposed by your Ofsted registration. This information will be used to check that bookings do not exceed the registration limits.

- **Courtesy Letter Text**

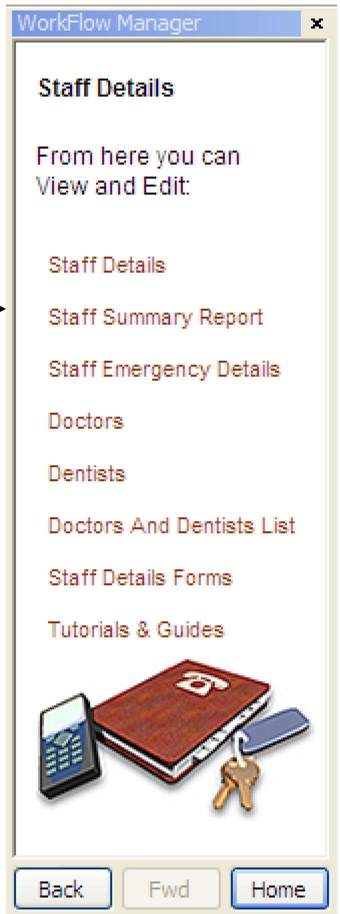
  You can set up optional text to appear at the top and bottom of your invoices, reminders and payslips.

- **Voucher Companies**

  The names and contact details of any voucher companies that you use. SuperFox will use these names to prepare summaries of vouchers received.

Services Provided and **Discounts** are covered later in this tutorial.

ENTERING STAFF DETAILS



13. Staff Details

SuperFox manages staff details from the staff details menu. →

Home > Staff Details >

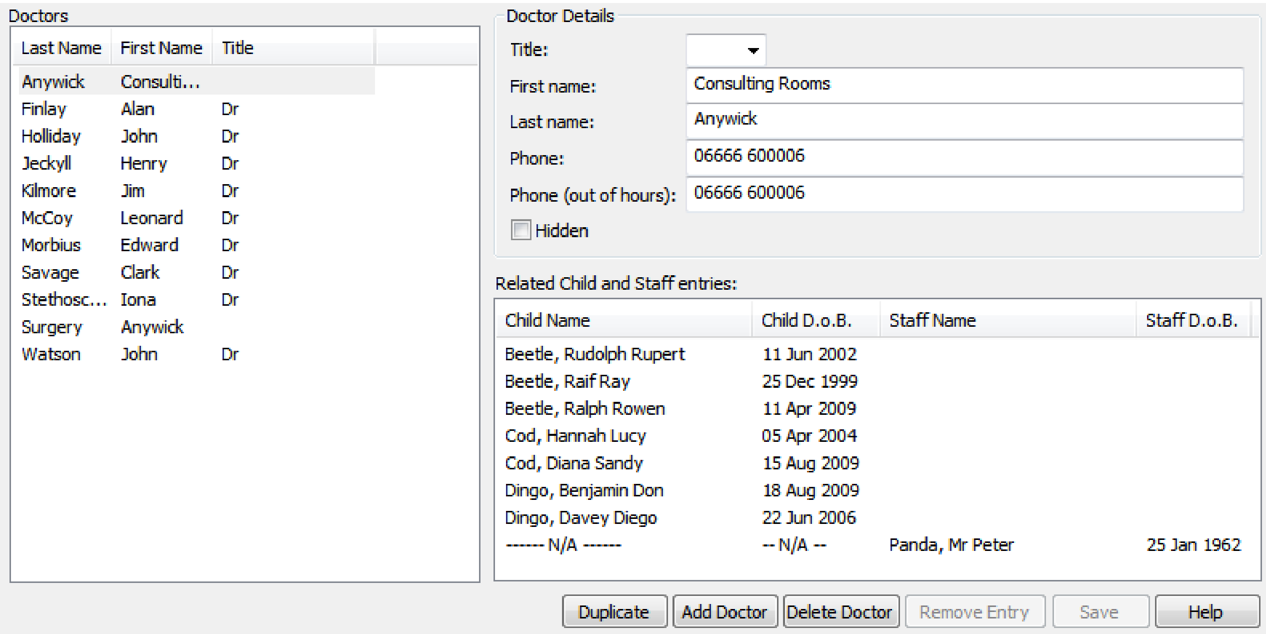
- **Staff Details**
  A large tabbed form that holds staff & volunteer details
- **Staff Summary Report**
  A report that summarises staff details
- **Staff Emergency Details**
  A summary of staff medical conditions & emergency contacts
- **Doctors** Doctor contact details
- **Dentists** Dentist contact details
- **Doctors & Dentists List**
  A report summarizing doctor and dentist contact details.
- **Staff Details Form**
  A printable blank form for new starters.

14. Add a Doctor and a Dentist

Whilst it may seem unusual to be dealing with Doctors and Dentists so early on, they are the simplest people in SuperFox and it will be good practice for adding staff and families shortly.

Home > Family Details > Doctors >

You will see the screen below with a list of Doctors on the left hand side and their details on the right hand side. (Many forms in SuperFox look similar.)

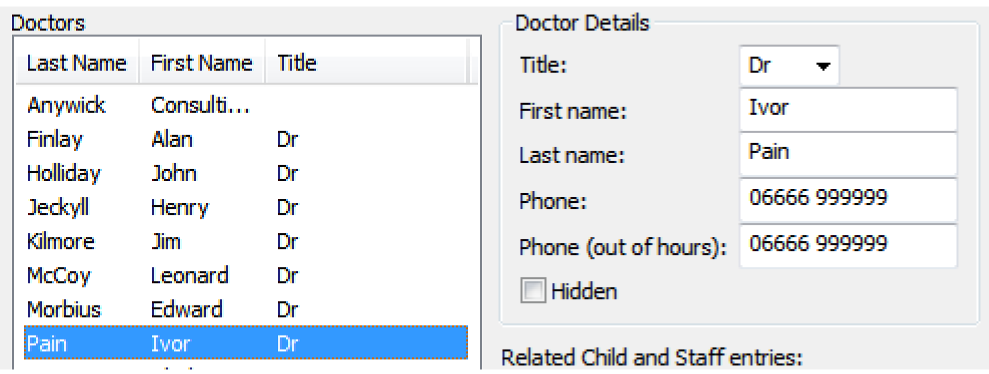


Exercise:

Add a doctor by pressing the ***Add Doctor*** button.

Our new doctor is Dr Ivor Pain and both of his telephone numbers are 06666 999999. Remember to press the ***Save*** button when you have finished. (You will need to delete <New Doctor> to enter the doctor's last name.)

When you have added Ivor's detail press the ***Save*** button and you should see:



Exercise:

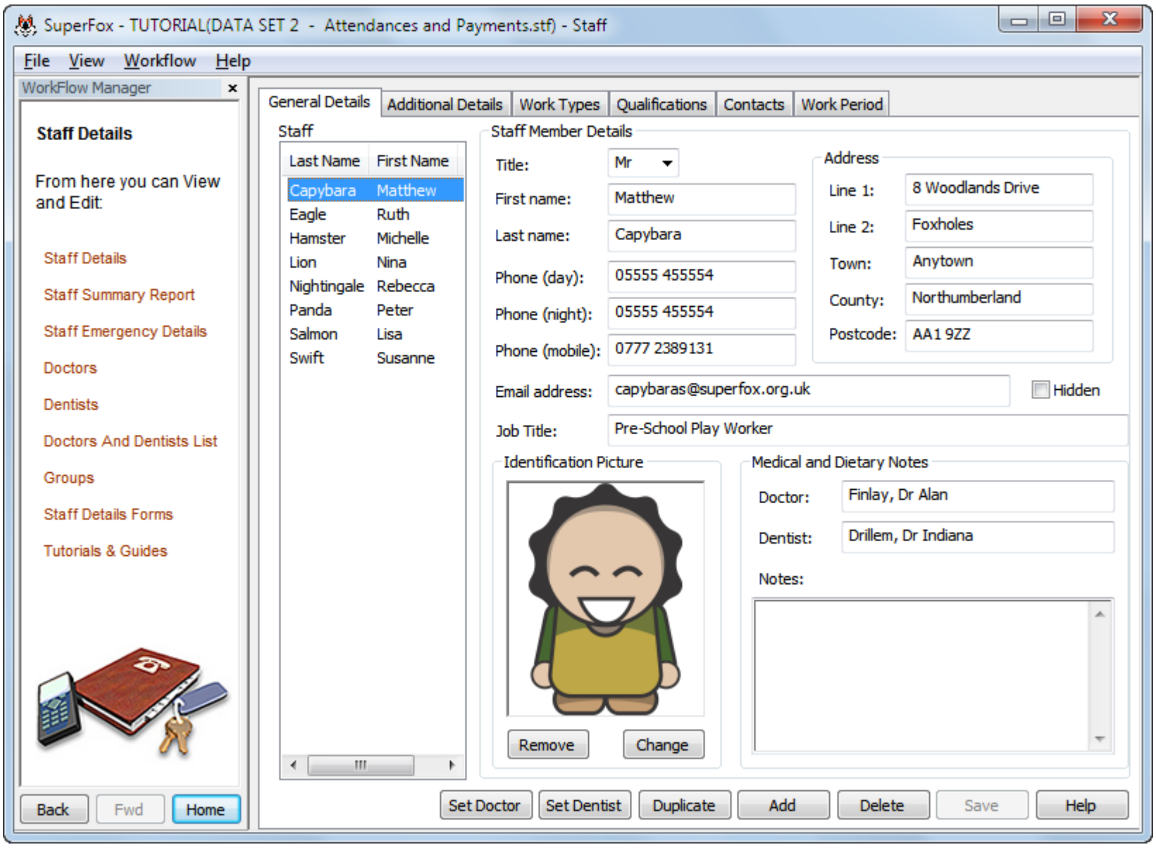
Add a dentist from ***Home > Family Details > Dentists > Add Dentist button***

Our new dentist is Dr Phil Ing and both of his telephone numbers are 0888 999999. Remember to press the ***Save*** button when you have finished.

15. Adding Staff Members

Staff and volunteer details are stored in a large tabbed form.

Home > Staff Details > Staff Details >



The information stored is used for administration and for safety reasons. Select Matthew Capybara from the Staff list.The tabs store 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 status, holiday year and allowance.
- **Work types** – The pay rates, if any, to be used for this person.
- **Qualifications** – Qualifications, courses and baby experience.
- **Contacts** – Emergency contact details.
- **Work Period** – planning pay rates and any contracted hours.

Adding a new staff member is very much like adding a doctor or dentist. You would simply press the ***Add*** button and fill in the new staff member's details on each of the tabs.

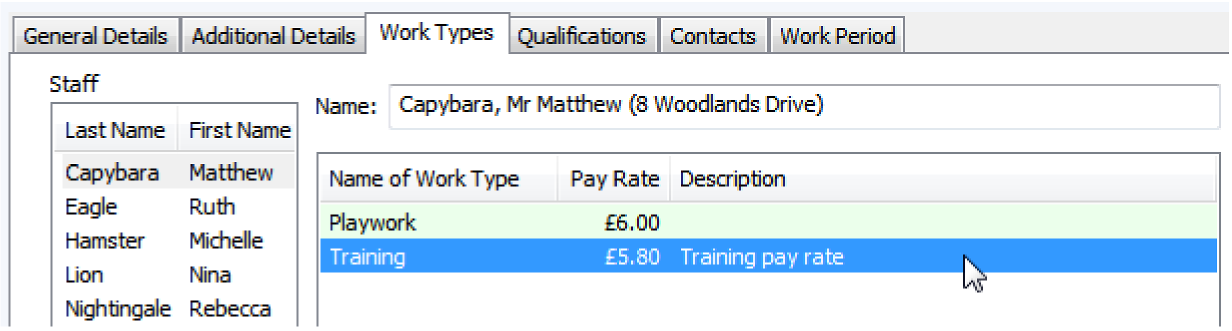
Volunteers

Please remember to enter details for volunteers. If a volunteer is unpaid you should tick the ***Volunteer*** box on the Additional Details tab and this will exclude them from the payslip runs.

16. Work Types

With Matthew Capybara still selected, click on his ‘Work Types’ tab.

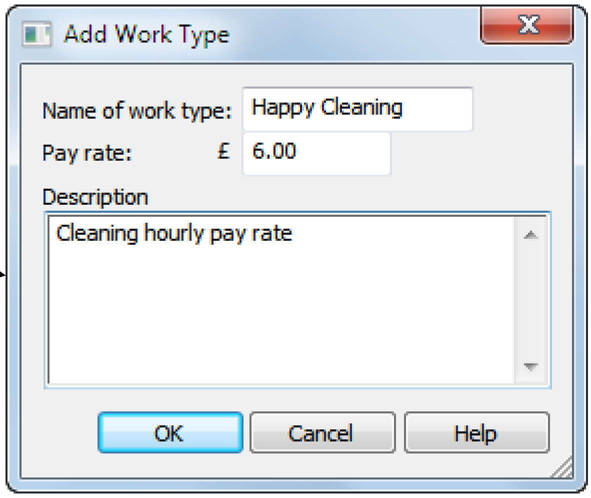
You can see that Matthew has two work types set up, ‘Playwork’ and ‘Training’ which are paid at different rates.



Exercise:

Add a new Happy Cleaning pay rate.

Press the Add button at the bottom of the Work Types tab and enter the details shown here.

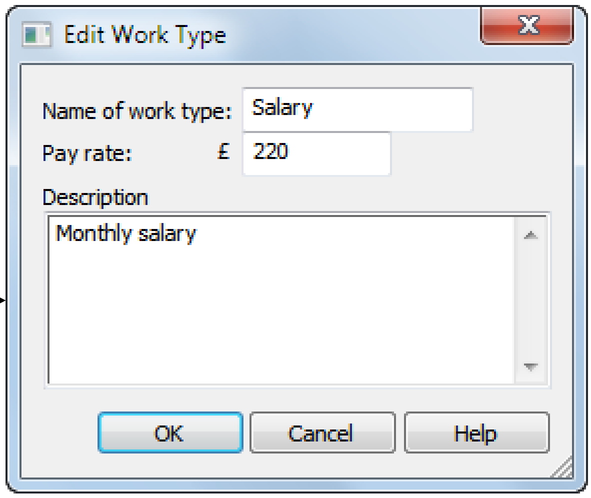


When you press ‘OK’ Happy Cleaning should appear in the list of Matthew’s work types.

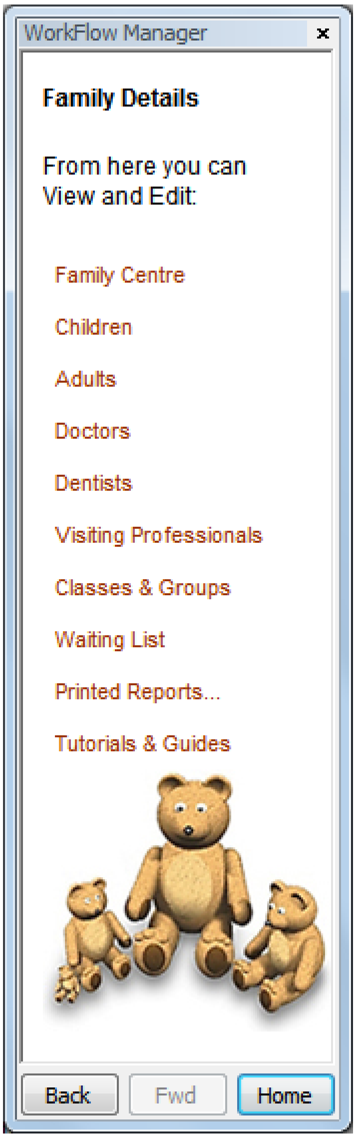
Because each staff member has their own work types you have the option of setting their pay rates to reflect their experience and responsibility.

In SuperFox a Work Type is simply an amount of money that is paid to a member of staff for a unit of work. It could be an hourly rate, a day rate or a salary or even a one off payment.

A monthly salary might look like this.



The description that you choose will appear on payslips.

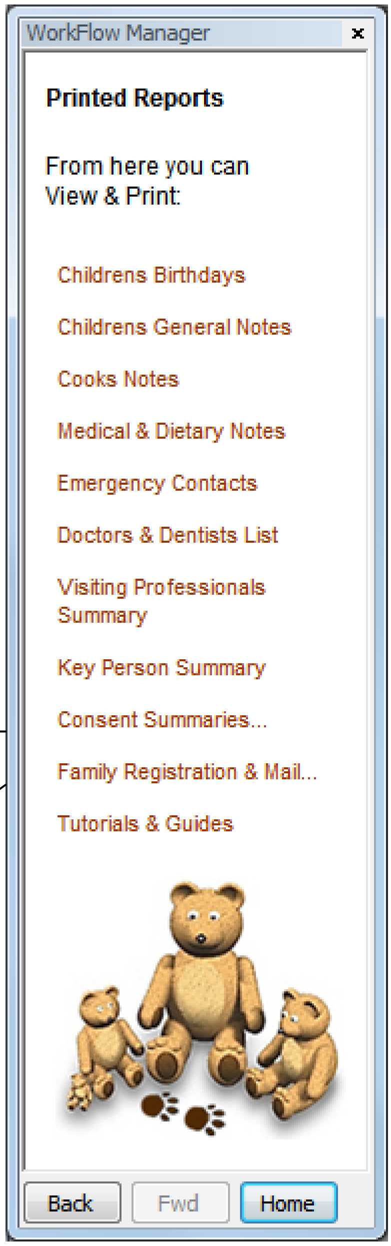


17. Family Details

SuperFox manages family details from the Family Details menu.
Home > Family Details >

The options available are:

- **Family Centre** – set up and work with your families
- **Children** – work directly with children’s details
- **Adults** – work directly with adults’ details
- **Doctors, Dentists** – doctor and dentist contact details
- **Visiting professionals** – contact details for visiting professionals (health visitors, dieticians, etc.)
- **Classes & Groups** – put the children into classes and groups
- **Waiting List** – enquiry management system
- **Printed Reports** – sub-menu…



The menu of children’s printed reports is very comprehensive.

The children’s reports can all be filtered to include children in a given class or group. For example, you can produce reports just for a Mini-Bus pickup group or for a Nursery Class.

There are two more report menus under the Printed Reports menu:

Consent Summaries
Summaries showing children with and without consents for Face Painting, First Aid, Outings, Photography or Sun Screen use.

Family Registration & Mail
A selection of family registration forms (blank or completed for verification) and useful mail merge data sources

18. Exercise - Entering a New Family

We are going to enter a new family now and the easiest way to do this is to leave Tutorial Dataset 2 loaded and to work through the ‘Entering Family Details’ mini guide.

We will return to this tutorial when you have successfully added the Snail family!

19. Using the Family Details Printed Reports

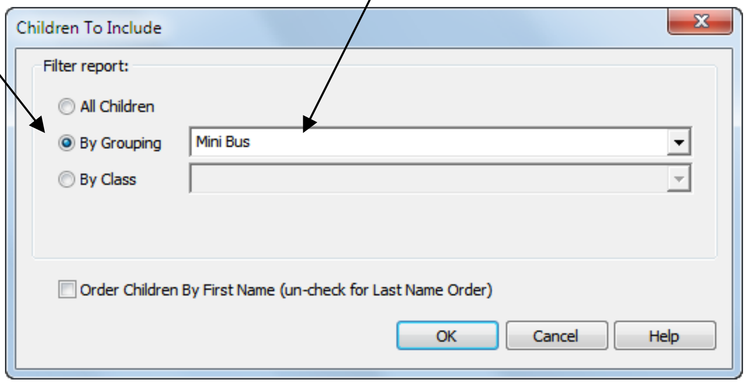
Hopefully Gary Snail is now happily registered with your setting!

Producing the children’s printed reports is very simple, let’s have a look at an example.

Let’s assume that our setting runs a mini bus and we collect and deliver some children locally. It would be good to take some emergency information with us when we leave the setting. This might include a summary of the children’s emergency contacts, just in case.

Home > Family Details > Printed Reports > Emergency Contacts >

The following form will pop up and ask you which children to include in the report.
Click the ***By Grouping*** button and choose ***Mini Bus*** from the drop down menu.



When you have chosen the group click ***OK*** and SuperFox will prepare a report looking like this:

Childrens Emergency Contacts

Kidspace

Mini Bus

>> *Childrens legal names are shown in italics if different.*

PR denotes persons with Parental Responsibility.

Report date: 28 June 2011

LW - Lives with: **Y** = Yes
S = Sometimes

Page 1 of 2

PR/Priority			Day Phone	Night Phone	Mobile Phone	Relationship	LW
Bear, Melanie							
PR	1	Mrs Susan Bear	04444 777777	05555 121212	07777 676767	Parent	(Y)
PR	2	Mr Peter Bear	05555 121212	05555 121212		Parent	(Y)
	3	Mr Raymond Bear	05555 121212	05555 121212		Brother	(Y)
	4	Mrs June Jackaroo	05555 121212	05555 121212		Grandparent	(Y)

Doctor: Dr Alan Finlay **Dentist:** Miss Ringo Confidence **Pass:** Agean Sea

You can print or save these reports in a large variety of formats including PDF. There is a good description of how to use the printed reports in the ***Using Reports*** Mini Guide.

20. Children's Calendar / Timelines

There are a number of useful interactive calendars in SuperFox. These all work in a similar fashion. The Children's Calendar / Timelines display gives very good visibility of children's bookings.

If you are in a Workshop your tutor will demonstrate the Children's Calendar / Timelines. If you are working independently this is a good time to work through the Children's Calendar / Timelines Mini Guide.

21. Entering Services

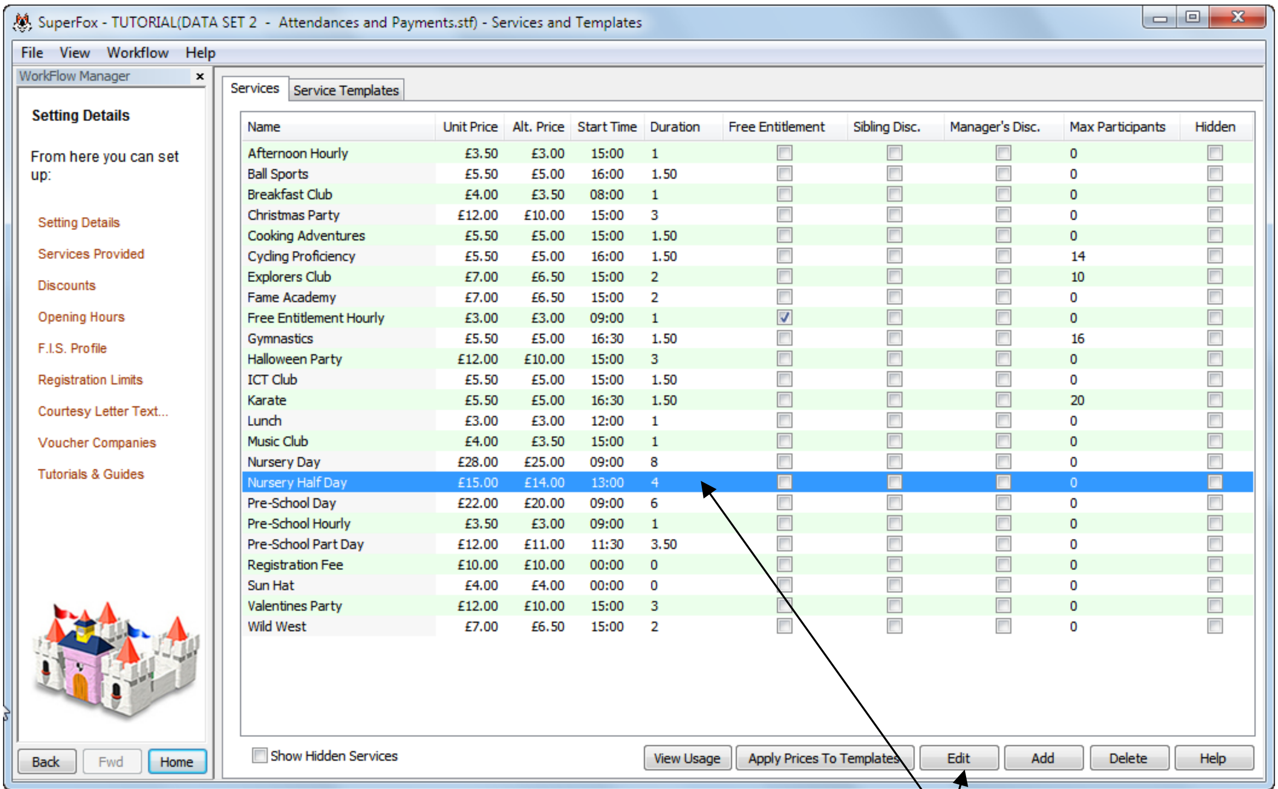
SuperFox needs to know about the type of services that your setting offers in order to produce register pages, invoices, management reports, milk claims and Free Entitlement returns.

The services are fully flexible and can be set up for hourly rates or session based care. They can also be used for childcare services or for purely financial transactions like T-shirts or registration fees.

It is vitally important that the services are entered correctly so we will look at an example from Tutorial Dataset 2.

***Home* > *Setting Details* > *Services Provided* >**

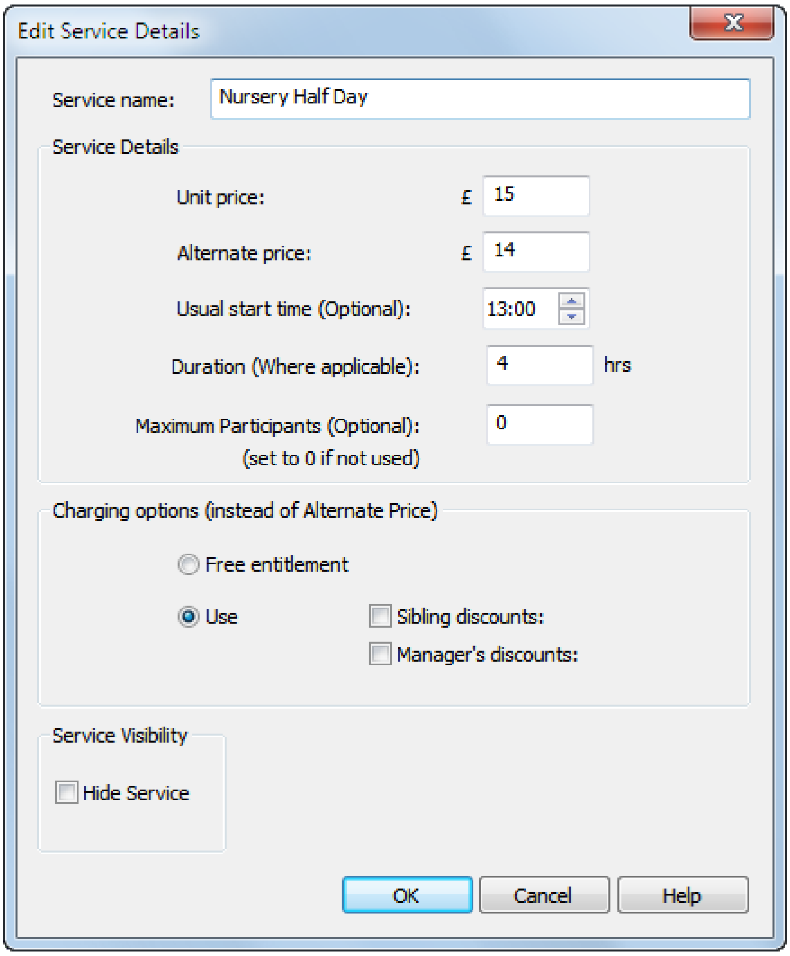
You will see a long list of the example services available at our setting…



Name	Unit Price	Alt. Price	Start Time	Duration	Free Entitlement	Sibling Disc.	Manager's Disc.	Max Participants	Hidden
Afternoon Hourly	£3.50	£3.00	15:00	1	☐	☐	☐	0	☐
Ball Sports	£5.50	£5.00	16:00	1.50	☐	☐	☐	0	☐
Breakfast Club	£4.00	£3.50	08:00	1	☐	☐	☐	0	☐
Christmas Party	£12.00	£10.00	15:00	3	☐	☐	☐	0	☐
Cooking Adventures	£5.50	£5.00	15:00	1.50	☐	☐	☐	0	☐
Cycling Proficiency	£5.50	£5.00	16:00	1.50	☐	☐	☐	14	☐
Explorers Club	£7.00	£6.50	15:00	2	☐	☐	☐	10	☐
Fame Academy	£7.00	£6.50	15:00	2	☐	☐	☐	0	☐
Free Entitlement Hourly	£3.00	£3.00	09:00	1	☑	☐	☐	0	☐
Gymnastics	£5.50	£5.00	16:30	1.50	☐	☐	☐	16	☐
Halloween Party	£12.00	£10.00	15:00	3	☐	☐	☐	0	☐
ICT Club	£5.50	£5.00	15:00	1.50	☐	☐	☐	0	☐
Karate	£5.50	£5.00	16:30	1.50	☐	☐	☐	20	☐
Lunch	£3.00	£3.00	12:00	1	☐	☐	☐	0	☐
Music Club	£4.00	£3.50	15:00	1	☐	☐	☐	0	☐
Nursery Day	£28.00	£25.00	09:00	8	☐	☐	☐	0	☐
Nursery Half Day	£15.00	£14.00	13:00	4	☐	☐	☐	0	☐
Pre-School Day	£22.00	£20.00	09:00	6	☐	☐	☐	0	☐
Pre-School Hourly	£3.50	£3.00	09:00	1	☐	☐	☐	0	☐
Pre-School Part Day	£12.00	£11.00	11:30	3.50	☐	☐	☐	0	☐
Registration Fee	£10.00	£10.00	00:00	0	☐	☐	☐	0	☐
Sun Hat	£4.00	£4.00	00:00	0	☐	☐	☐	0	☐
Valentines Party	£12.00	£10.00	15:00	3	☐	☐	☐	0	☐
Wild West	£7.00	£6.50	15:00	2	☐	☐	☐	0	☐

Now look at the Nursery Half day service by clicking on it in the list of services provided and then pressing the ***Edit*** button.

The properties of a service are:



- **Service name**

  SuperFox has predictive typing on many forms so they will be easier to use if you choose short names.

- **Unit Price**

  The normal price you would charge for this service. The service will only appear on an invoice if a price is set.

- **Alternate Price**

  An optional alternative price for this service.

- **Usual Start Time**

  If your service is not purely financial you should set the usual start time. You can easily change the start time as you book the service.

- **Duration**

  The duration (if any) of the service in hours. Services without durations (like T-shirts) will not appear on register pages.

- **Maximum Participants**

  Some services may be number limited, leave this number set to zero if there is no limit.

- **Charging Options**

  - ***Free Entitlement***

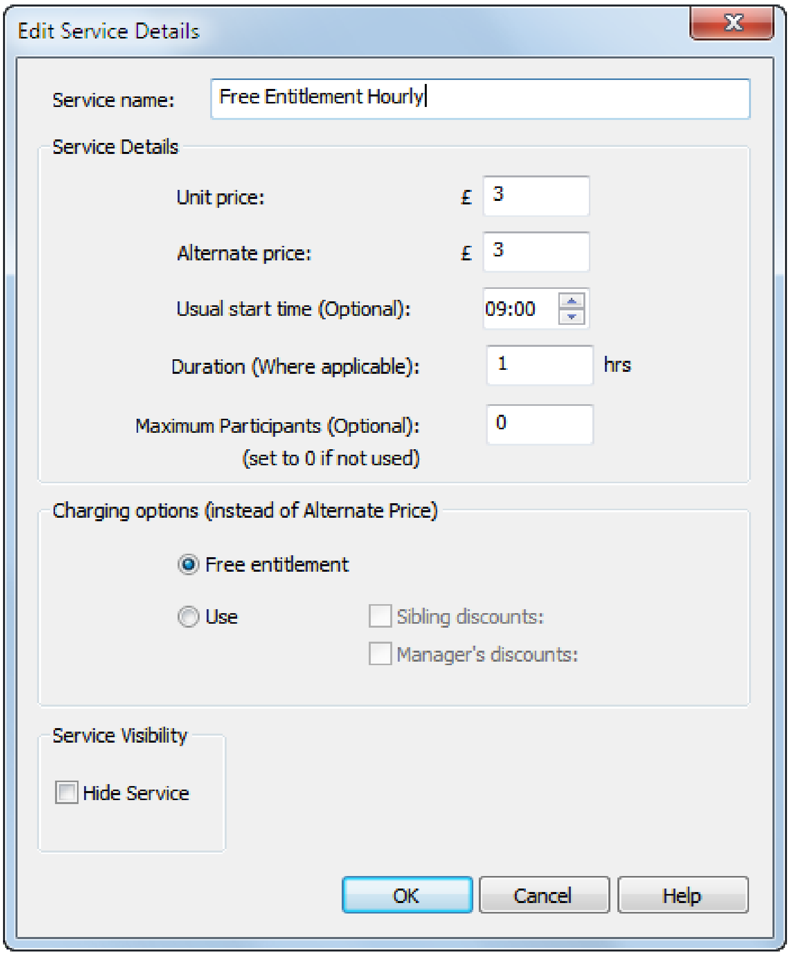
    Select this option if the service is Free Entitlement. You should enter the reimbursement value of the Free Entitlement as the Unit Price as this is used by several financial reports. Free Entitlement services will always appear as zero priced on family invoices.

  - ***Use Sibling Discounts***

    Select this option if this service is eligible for sibling discounts. (See Discounts mini guide.)

  - ***Use Manager's Discounts***

    Select this option if the service is eligible for management discounts. These can be granted to an account holder at the manager's discretion. (See Discounts mini guide.)



Free Entitlements

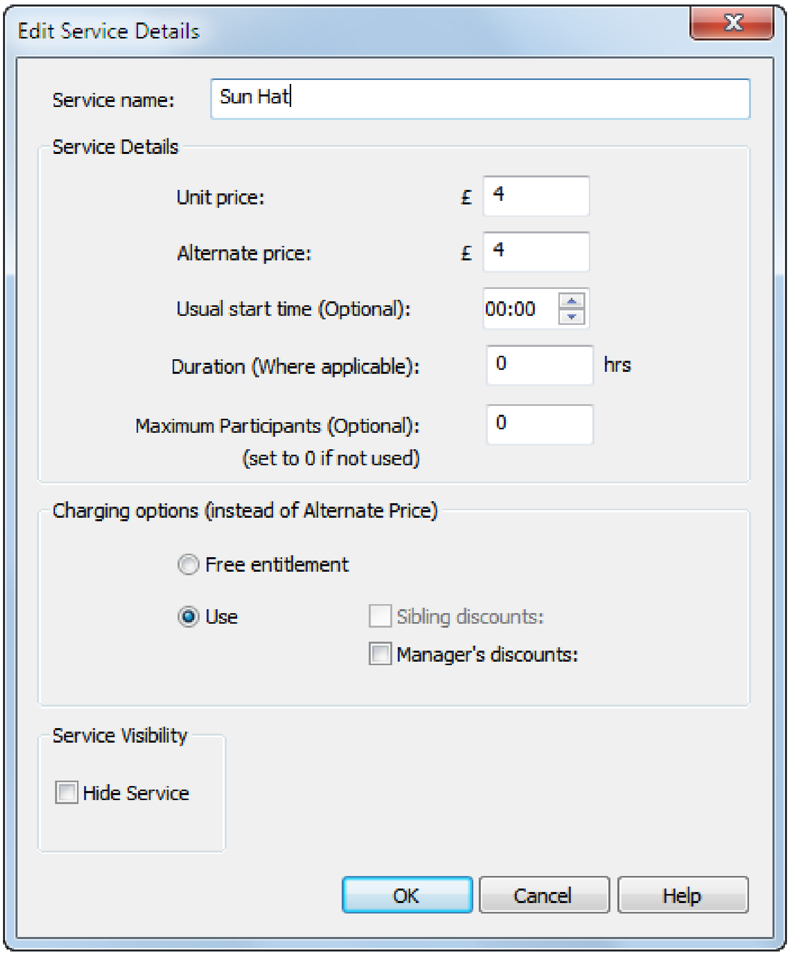
A correctly entered hourly Free Entitlement service look like this:

- The Free Entitlement button is selected.
- The reimbursement value of the hour is £3.00
- A usual start time of 09:00 is set. This can be changed at booking time.
- Duration of 1 hour is entered as we have set this up as an hourly service.
- We have not set a maximum number of concurrent participants.

Financial Services

A correctly set up service which is purely financial, a sun hat sale, would look like this:

- We are selling sun hats for £4.00
- They have a price so they will appear on the family invoices.
- There is no duration so they will not appear on register pages.
- Because there is no duration, there is no need to set a usual start time. (This is because services without durations will not be included in a concurrent-use check that is made when bookings are entered.)



It is very important to understand the distinction between these types of service and how they are set up correctly. You can find more information in the Services mini guide.

Exercise

Use the Services Provided ***Add*** button to add a new service called 'Happy Cleaning Club' with:

- Unit price = £5.50
- Discount price = £5
- Usual Start Time = 16:00 (4pm)
- Duration = 1.5 hours
- Maximum participants = 18
- The service is not a free entitlement and it is not eligible for sibling or manager's discounts.

(You can find the Happy Cleaning Club service in Tutorial Dataset 3 if you want to check your work.)

"Quick Start" Section 4
BOOKINGS AND INVOICES

22. Recording Attendances

There are two ways to enter children's attendances in SuperFox:

a) The Timesheet / Register Form

This is a simple form that has tabs that allow you to enter attendances in register format or a timesheet format. This is a great place to enter small numbers of bookings, attendances, or one-off sales like sun-hats.

The Timesheet / Register form is found in:

Family Accounts > Booking Centre > Register tab & Timesheet tab >

b) Quick Bookings

This is an interactive calendar that allows you to put bookings in for one or more children, groups or classes, services and dates in a few key strokes. Quick Bookings are verified for concurrent bookings, setting registration limits, room plans and optional service limits.

Quick bookings can be used for individual families from*:*

Family Details > Family Centre > Calendar tab > Bookings option >

Quick bookings can be used for individuals, groups and classes of children from:

Family Accounts > Booking Centre > Calendar tab > Quick Bookings option >

We are going to start by putting in a couple of bookings with the Timesheet / Register form to explain how the program handles bookings.

23. The Timesheet / Register Forms

With Tutorial Dataset 2 still loaded go to the Timesheet / Register form:

Home > Family Accounts > Booking Centre > Register tab >

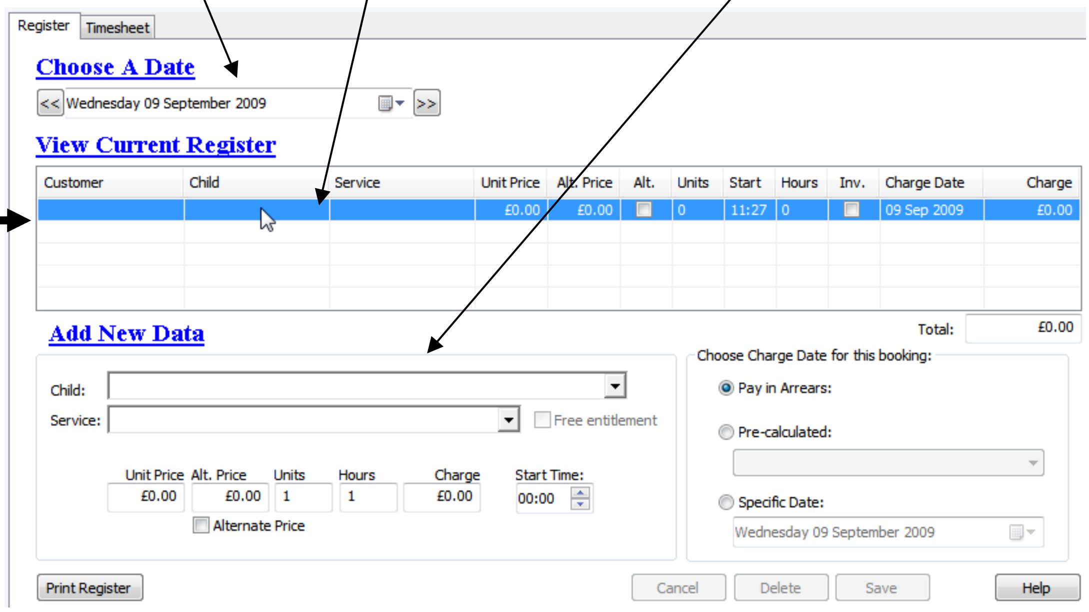
Let's start by looking at the Register tab. This has three main areas.

1 – The Register Date

2 - Attendances entered already

3 - A place to enter / edit attendances

Next blank line



Exercise

Let's book in Cameron Porpoise for Pre-School on 9th September 2009.

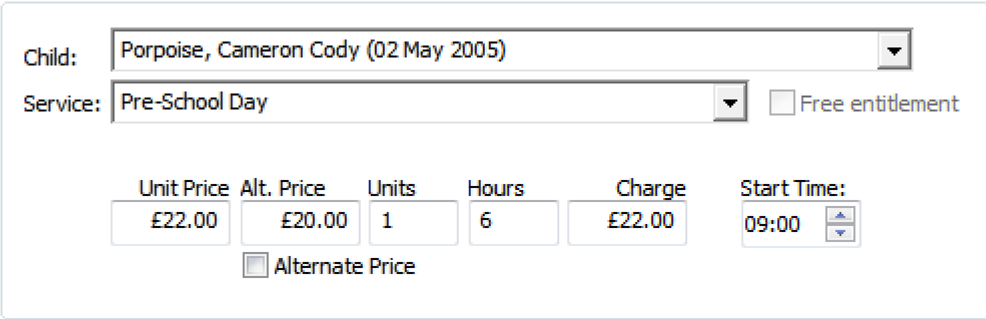
a. Start by setting the date to 09 September 2009

b. Now click on the next blank line (arrowed above)

c. Press the tab key to take you to the Child field. This is a drop down list with predictive typing. We're going to book in Cameron Porpoise, so start by typing 'P', and soon as Cameron's name will appear.

d. Press tab to take you down to the Service field. We are going to book Cameron in for Pre-School Day, so start by typing 'P' and Pre-School Day will soon appear.

e. Press the tab key again and the default service attributes will appear.

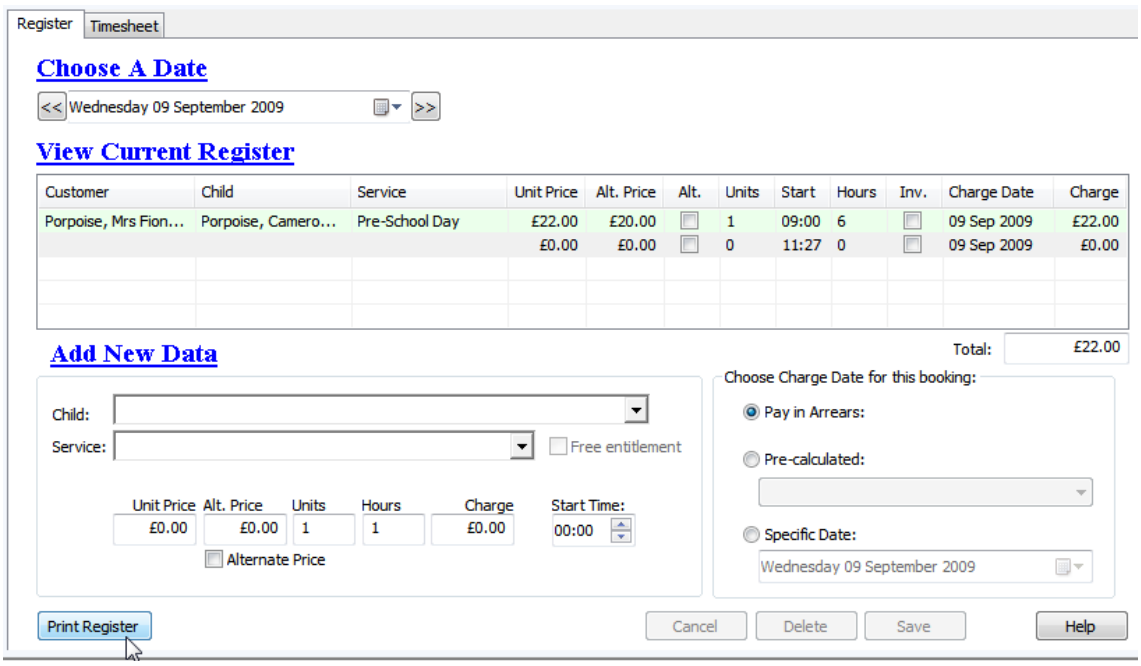


f. You could at this stage change the content of any of the white boxes and you could apply an alternate price by ticking the Alternate Price box. We won't do that yet.

(Sibling Discounts and Manager's Discounts are managed from the *Family Accounts > Discounts >* form, see the Discounts mini guide for more details.)

g. We won't do that, just press the ***Save*** button and the new attendance will appear in the 'View Current Register' list. Job done!

(You would just press Tab to continue entering register entries.)

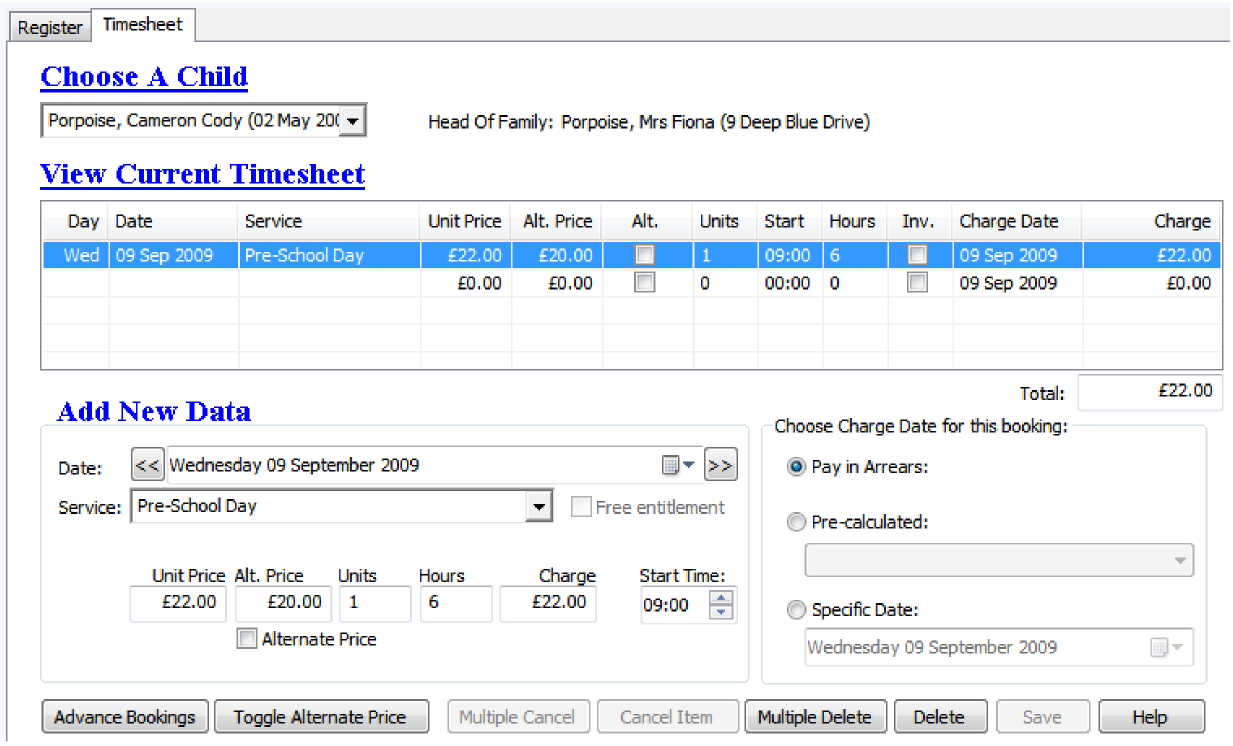


The ***Register tab*** is the right place to enter small numbers of services charged in arrears, for example extra or stay-late attendances transcribed from the setting register at the end of the day.

The ***Print Register button*** is one of the places that you can print the day's register pages. We will have a look at an example register page from Tutorial Dataset 3 shortly.

Higher volume bookings can be entered from the ***Timesheet Tab*** or by using ***Quick Bookings***.

Let's have a look at Cameron Porpoise's timesheet, click on the ***Timesheet Tab***. This works in much the same as the Register Tab but here the context is the child's name rather than the date.



The Timesheet tab has several extra functions that are better used when looking at all of the child's bookings:

- **Advance Bookings** – one of the methods of adding repetitive bookings in quantity. The Quick Bookings function has largely superseded the Advanced Bookings button.
- **Multiple Delete button** – deletes large numbers of this child's un-invoiced bookings.
- **Multiple Cancel button** – cancels large numbers of this child's invoiced bookings.
- **Toggle Alternate Price button** – quickly change whether or not to use alternate prices.
- **Choose charge date for this booking** – allows you to set a date on which the service will become payable. Useful for pay in advance bookings.

The timesheet is a good place to cancel a small number of unused bookings for an individual child. Bookings can also be cancelled from the Family Centre and Booking Centre Calendars, which are better suited to large numbers of cancellations e.g. on snow closure days. See the 'Cancellations, Credits & Refunds' Mini Guide for more details.

Note:

To keep the timesheet list short the child's bookings are removed from view on the timesheet when they have been invoiced and used. You can always see them on the register tab, the calendars and from the View A Family's Account form in Family Accounts and in the Family Centre.

Flipping Between Timesheet and Register View

You can flip in between the current timesheet view and the current register view, and vice versa, just by clicking on the tabs at the top of the form.

If you ***hold down the 'Ctrl' key while you click*** between the two views you will maintain the context you are working in:

- **Register to Timesheet** - will go to the timesheet of the child in the current highlighted register entry.
- **Timesheet to Register** - will go to the date of the attendance that is highlighted in the child's timesheet.

Remember you will then need to click in the 'Current View' window to see the current timesheet or register entries.

DELIVERY DATES AND CHARGE DATES

Each service that you provide has two dates associated with it. You can see these listed on the Register and the Timesheet tabs.

The **Delivery date** is the date on which the service will actually be used.

The **Charge date** is the date on which you will ask for payment for the service you have provided.

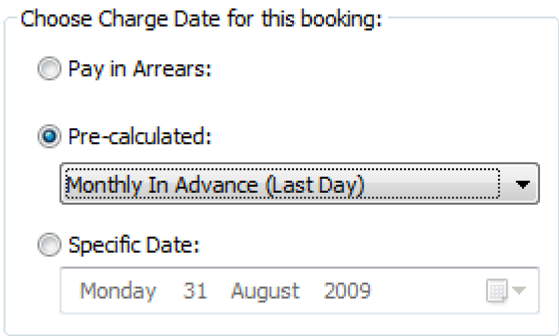
The charge date must be set when you make the booking if you intend to invoice in advance.

If you do not set the charge date SuperFox will set it to be the same as the delivery date, it is a pay in arrears option. The bookings will become payable as they are used.

To charge in advance you will need to choose a charge date.

It is easy to set a charge date for a booking using the ‘Choose a Charge Date for this booking’ box on the timesheet or register forms.

When entering the booking. You can then choose from the following options:



- Choose **‘Pay in Arrears’** (the default option) the services will be payable as they are used.
- Choose **‘Pre-calculated Date’** to apply a common pre-payment scheme.
- Choose **‘Specific Date’** to set a specific date on which the booking will be payable.

The pre-calculated charge dates that you can choose from the drop-down menu are:

Termly / Half Termly in Advance

If you have set up charge dates for the Opening Hours date ranges then you can choose to use these as the booking charge dates for the register date.

Weekly in Advance (Last Day)

This will set the charge date to be the Sunday before the booking day.

Weekly in Advance (Specific Day)

As above, but choose a day of the week to use as a charge date.

Monthly in Advance (Last Day)

This will set the charge date to be the last day of the previous month. (This is a good choice for monthly advance bookings.)

Monthly in Advance (Last Open Day)

This will set the charge date to be the last open day of the previous month. If the previous month does not have a last open day the program will use the last day of the month.

Monthly in Advance (Specific Day)

As Monthly in Advance but choose a day of the month to use as a charge date. The day can only be chosen from the range 1 to 28 to avoid causing a problem with February.

You can enter bookings with more unusual charge date schemes using Quick Bookings. Any user defined schemes will appear at the end of the Pre-Calculated charge date list.

24. Tutor Demonstration - Quick Bookings

The easiest way to enter higher volume bookings is to use the Quick Bookings function.

This is a clickable interactive calendar that allows you to enter childrens bookings very quickly.

The quick bookings function can handle:

- Individual children, groups or classes.
- Individual services, daily or weekly service templates.
- The advance charging schemes listed above.
- User-defined charging schemes, e.g. fortnightly in advance.

If you are in a SuperFox Workshop your tutor will now demonstrate the Quick Bookings function.

If you are not in a workshop please pause here go through the Quick Bookings Mini Guide.

25. Printing a Register Page

We are going have a look at one of the printed register pages that can be produced by SuperFox.

Start by loading Tutorial Dataset 3:

Home > Backups & Tutorial Data > Tutorial Manager > Select Dataset 3 > click Load Selected Tutorial Data button >

You can print register pages from two places in SuperFox:

1) From *Family Accounts > Booking Centre > Register Tab >*

Simply click on the 'Print Register' at the bottom of the register tab.

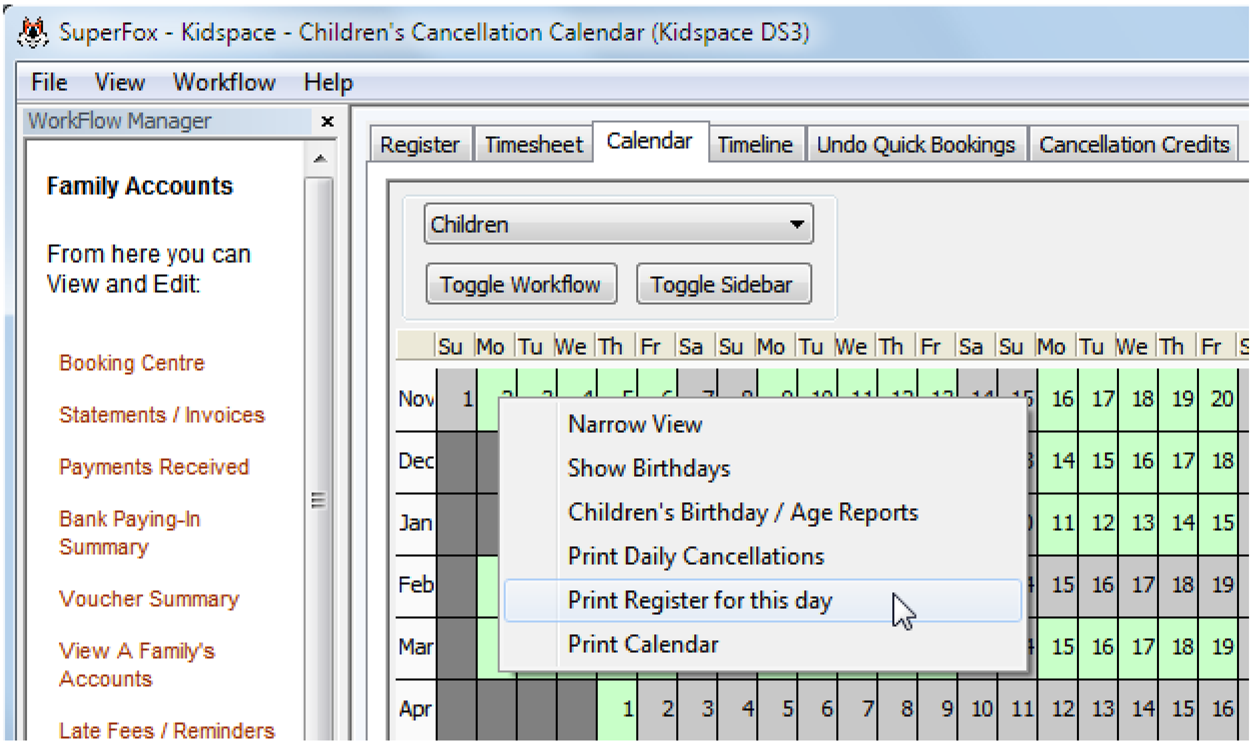
2) From the right click menu on the 'Children' calendar in:

Family Accounts > Booking Centre > Calendar tab > (Choose Children view) >

Family Details > Family Centre > Calendar tab > (Choose Children view) >

Exercise:

Go to: Home > Family Accounts > Booking Centre > Calendar tab > Children view >



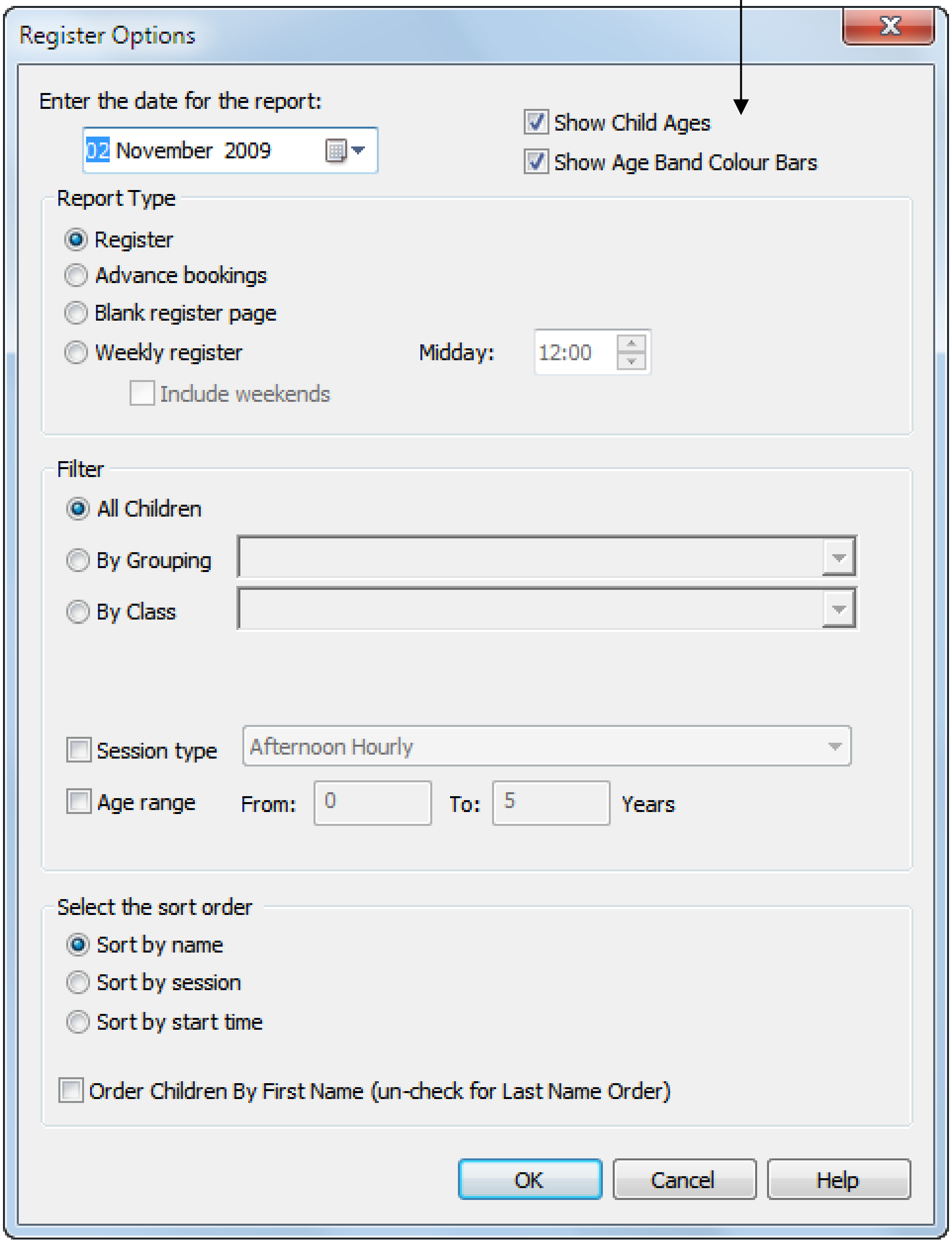
Use the right mouse button to click on Monday 2nd November 2009. (You may need to scroll the calendar using the arrow buttons to get this date on the calendar.)

Now choose the Print Register for this day option from the pop-up menu.

This register options form will appear, use this form to choose the style of register page you would like.

You can optionally include the children's ages or colour code their register entries to indicate their Ofsted age band. (If you choose to use them the colour coding corresponds with the colours used on the children's timelines.)

Now choose the options shown below:



You could choose to print (or save) several types of register page:

- **Register** – arrival & departure times
- **Advance bookings** – a detailed list of the sessions attended.
- **Blank register page** – useful for drop-in attendances.
- **Weekly register** – a simple summary of AM and PM attendances for a week.

You can also filter the register reports to include only the children who are:

- **In a given group or class**
- **Attending a specific session**
- **In a given age range**

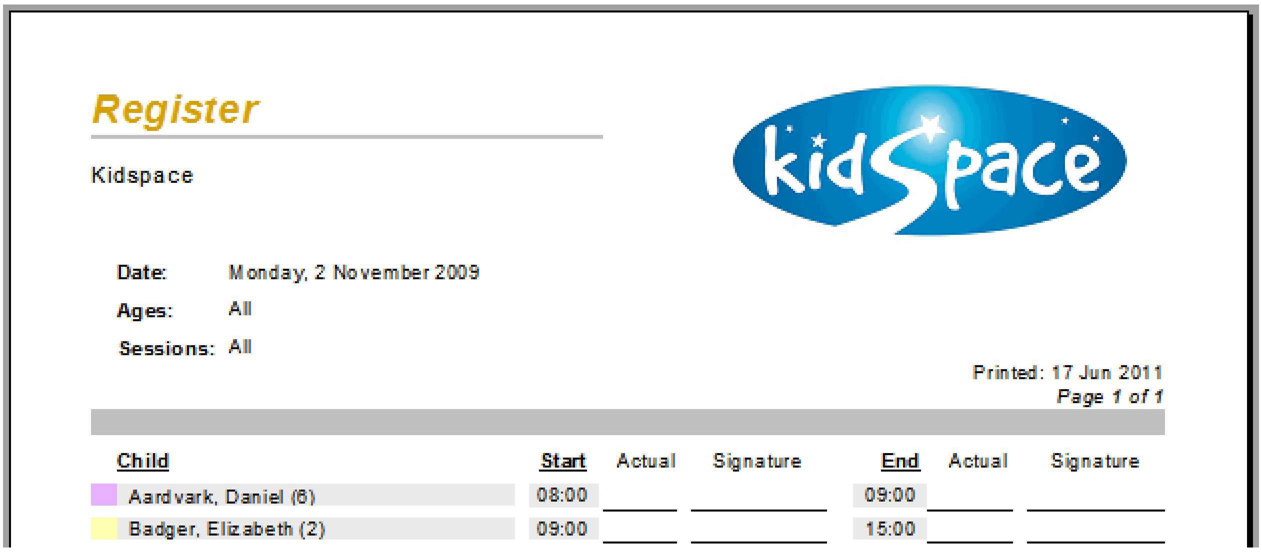
You can also choose the sort order that the children will appear on the printed register and advance booking reports by name, session or start time.

You can also tick the last box to choose to use produce register pages ordered using the children's first names rather than their last names.

The different types of register page are described in more detail below. For the start and end time to be correctly calculated you will need to specify start times when booking the children into the setting.

Classes and groups are managed from the ***Family Details > Classes and Groups >*** option.

The first type of printed register is the most commonly used option and is a list showing children's arrival and departure times at the setting. Any filtering applied is shown at the top of the register page. (Name and start time filters are useful for this report.)



Register

Kidspace

Date: Monday, 2 November 2009

Ages: All

Sessions: All

Printed: 17 Jun 2011
Page 1 of 1

Child	Start	Actual	Signature	End	Actual	Signature
Aardvark, Daniel (6)	08:00			09:00		
Badger, Elizabeth (2)	09:00			15:00		

The columns printed are:

- Child's name and optional age with colour coded Ofsted age band.
- Expected start time with a space to the right for actual start time if different and a signature
- Expected end time with a space to the right for actual end time if different and a signature
- If you need to distinguish between two children with the same name you can set nicknames for one or both of the children in the ***Family Details > Family Centre > Children's Details tab >***

See the Register Pages mini guide for more details about the printed register pages.

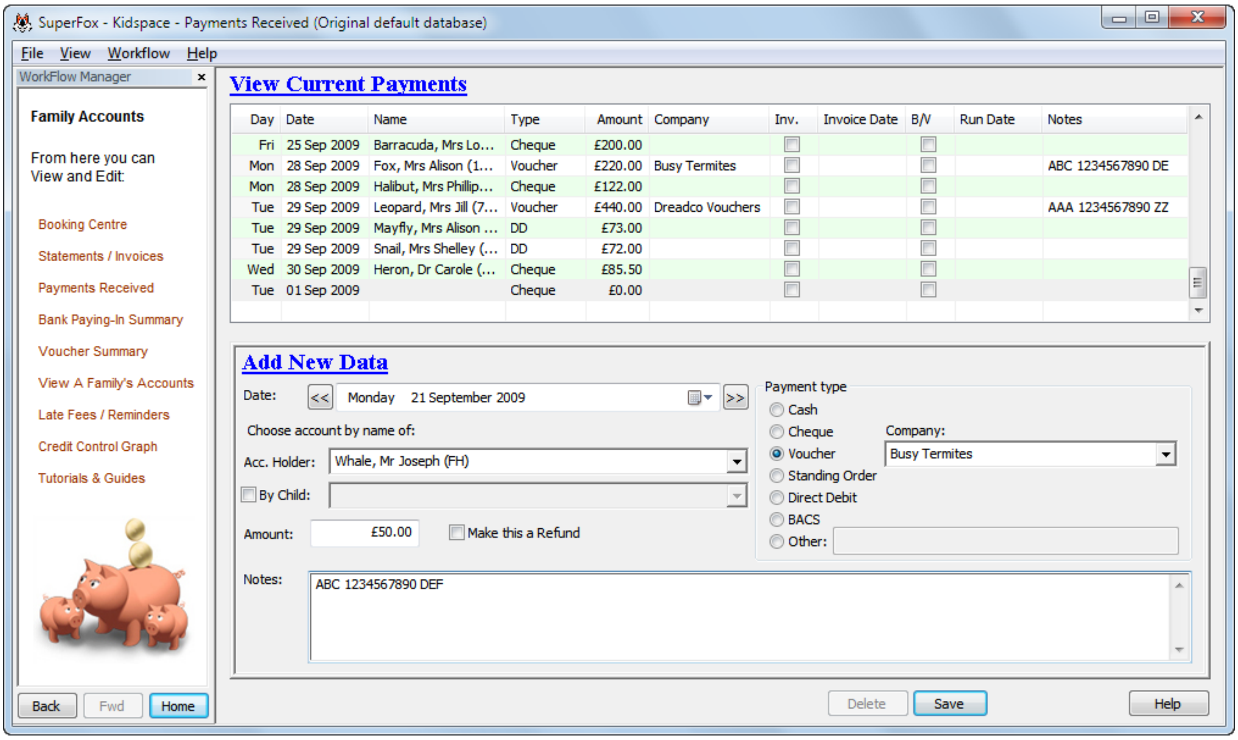
26. Recording Payments Received From Parents:

Payments received can include vouchers, standing orders direct debits and BACS transfers.

Still using Tutorial Dataset 3:

Home > Family Accounts > Payment Received >

Click latest entry under "View Current Payments" (with a date but no name) (entry becomes a blue line)…



… > under "Add New Data" in lower window find Date > select day that you want entered > enter details against name (easy entry – just start typing surname) – enter amount, payment type and notes > click Save

Tutorial – add a £50 Voucher Payment from the Whale family on 21 September 2009.

Any 'Notes' that you enter along with a Payment Received will appear in other reports, so please only type things that you don't mind other people seeing! ☺

You can select a family either by choosing the name of the 'Head of Family' or by choosing the name of any child who is in the family (the payment still relates to the family account, it is not allocated to the specific child).

This is also the right place to enter a refund from your bank account to a parent in the same way as a payment received, but tick the 'Make this a refund' box. See the Cancellations, Credits and Refunds Mini Guide for more details.

Cash, Cheque and Bank Payments Received Directly From Parents

SuperFox treats this income as it were all cash received from parents. Here is how you should process these payments:

- Record the amount received, payment method and family name on paper in the setting as usual.
- Before producing the next invoice run enter the payments received into SuperFox.
- Produce a bank run summary.
- Bank the cash and cheques.
- Reconcile the DD, SO and BACS items on the summary against your bank account.

Please read the Cancellations, Credits and Refunds mini guide to find out how to make account credits and refund payments using SuperFox.

Indirect Payments Including Vouchers or Salary Sacrifice Schemes

Voucher and Salary Sacrifice income is treated differently to fees received directly from parents. This is because the payment comes from a third party. Typically for vouchers either:

- You will need to reclaim the voucher payments from the voucher company (or salary sacrifice scheme), or
- A deposit will be credited automatically to your bank account which you will need to reconcile with your records.
- The reimbursement may occasionally be incorrect or significantly late.

SuperFox helps you deal with both of these scenarios.

- Set up the names of the Voucher Companies (or salary sacrifice schemes) in the Setting Details > Voucher Companies > section of SuperFox.
- Enter vouchers received, or notified payments, under Family Accounts > Payments Received >
- Produce a Voucher Run Summary.

When you actually receive a payment from a voucher company or salary sacrifice scheme you should enter it as 'Income (non-P&L)' - more of this later!

Free Entitlement Income

The Free Entitlement is free at the point of delivery and is paid for by a grant which you will need to claim from your local authority.

When your free entitlement funding or voucher reimbursement money is paid...

Enter it as an 'Income (non-P&L)' item in the Setting Details > Setting Transactions > form - more of this later!

27. Creating Invoices

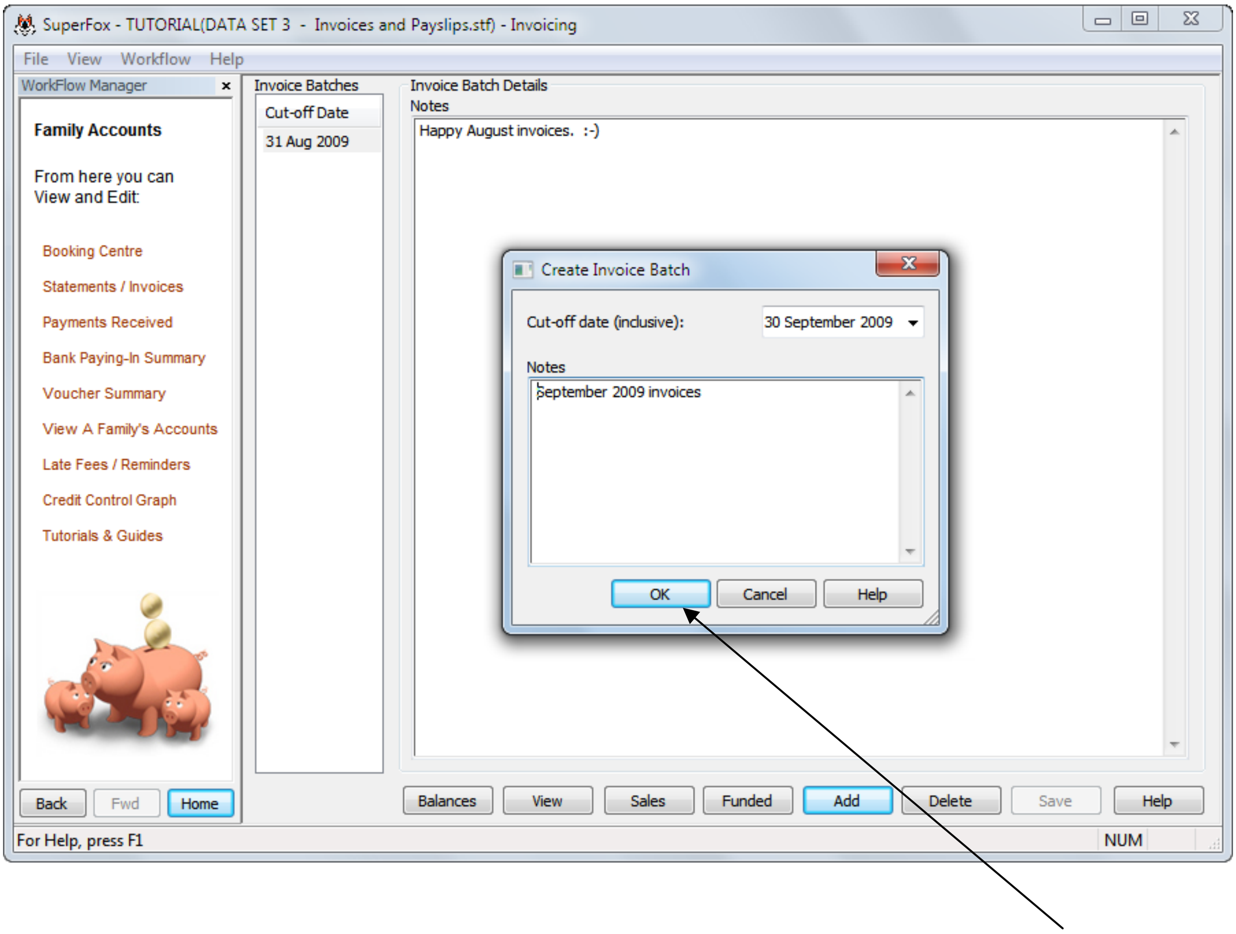
SuperFox can provide comprehensive, automatic invoicing for your whole setting with just five clicks of a mouse button!

First the children's attendances and the payments received must be up to date.

Let's create an invoice batch. Check that Tutorial Dataset 3 is loaded and then go to:

Home > Family Accounts > Statements / Invoices >

Click on the Add button and enter a cut-off date of 30 September 2009, like this.



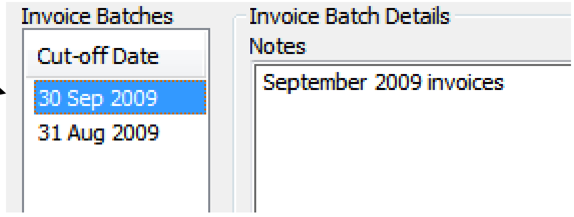
If you feel it would be helpful you can add some notes about the invoice run. When you are done press the 'OK' button and SuperFox will generate the invoices.

IMPORTANT – YOU NEED TO UNDERSTAND THIS…

Account line items will be included in this invoice run if they have not yet appeared on an invoice and they have a charge date up to and including the cut-off date.

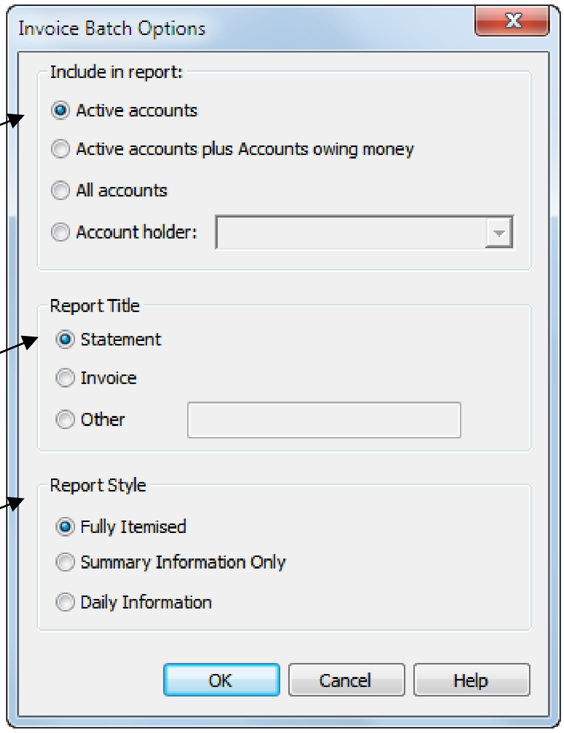
Payments received will be included in this invoice run if they have not yet appeared on an invoice and they have a received date up to and including the cut-off date.

When the invoice batch has been prepared it will appear in the list to the left of the form.



Viewing / Printing An Invoice Batch

When you have created the new invoice batch use the 'View' button to display the invoices on screen. A small form will pop up.



You can choose to produce invoices for active accounts only, active accounts plus accounts owing money, all accounts or for an individual account holder. (An account holder is a Family Head or any other adult with account line items held in their names.)

You can title the report as 'Statement', 'Invoice' or with a few words of your choice (e.g. 'Your Bill'.)

You can also choose which style of invoice to produce.

There are three styles of invoice that show different levels of detail.

1) **Fully Itemized**

   This option shows each line item used by each child. It gives parent the most information about their childcare and uses the most paper to print.

2) **Summary Information Only**

   This option shows the least detailed information about a child's setting use. It shows simple totals for the paid items, free entitlement and other items for each child for the entire invoice period. This option uses the least paper to print.

3) **Daily Information**

   This option shows daily information about a child's setting use. It shows totals for the paid items, free entitlement and other items for each day that a child is in the setting. This is worth considering instead of the fully itemized option if child are using multiple services each day.

You can print all or some of the invoices in the batch at any time. You can also save the invoices in a variety of useful formats.

TIP!

Before printing anything skim through the on-screen invoices and check for gross errors. If necessary delete the invoice batch, correct the errors and start again.

Remember - an easy way to do this is to use the gold tree control on the report toolbar.

Detailed instructions for saving, printing and skimming through reports are given in the **Using Reports** mini guide.

There will be at least one page per active family during the period of the report. View the pages of the report using the navigation buttons on the report toolbar.

The report toolbar looks like this

Invoices are designed to be used with standard window envelopes. A fully itemized invoice looks like this:

Window Envelope Address

Invoice Date and Number

Setting Letterhead & Statutory Information

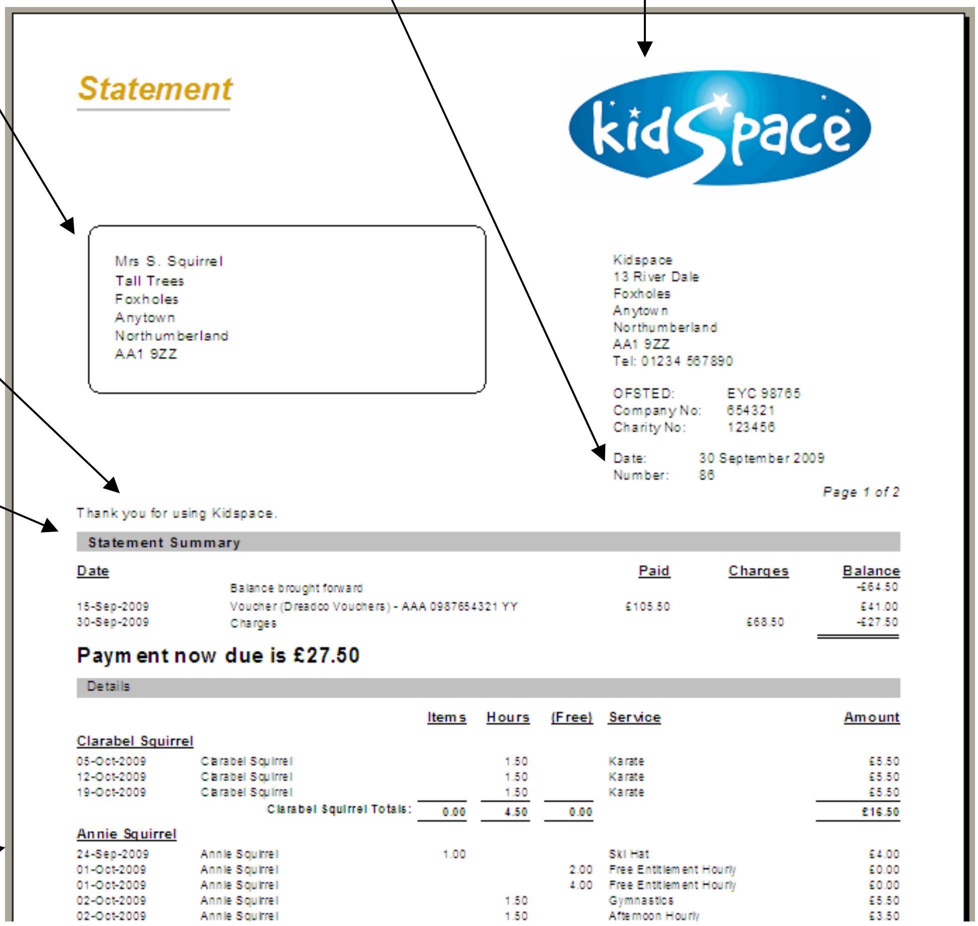
Customizable Text:

- Top (something like thank you)
- Bottom (what to do next, how to pay)

Statement summary

Itemized usage for each child:

- Paid Hours
- Free Entitlement Hours
- Items that don't have durations – like hats and fines.



Statement

Mrs S. Squirrel
Tall Trees
Foxholes
Anytown
Northumberland
AA1 9ZZ

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

OFSTED: EYC 98765
Company No: 654321
Charity No: 123456

Date: 30 September 2009
Number: 86

Page 1 of 2

Thank you for using Kidspace.

Statement Summary

Date		Paid	Charges	Balance
	Balance brought forward			-£64.50
15-Sep-2009	Voucher (Dreadco Vouchers) - AAA 0987654321 YY	£105.50		£41.00
30-Sep-2009	Charges		£68.50	-£27.50

Payment now due is £27.50

Details

		Items	Hours	(Free)	Service	Amount
Clarabel Squirrel						
05-Oct-2009	Clarabel Squirrel		1.50		Karate	£5.50
12-Oct-2009	Clarabel Squirrel		1.50		Karate	£5.50
19-Oct-2009	Clarabel Squirrel		1.50		Karate	£5.50
	Clarabel Squirrel Totals:	0.00	4.50	0.00		£16.50
Annie Squirrel						
24-Sep-2009	Annie Squirrel	1.00			Ski Hat	£4.00
01-Oct-2009	Annie Squirrel			2.00	Free Entitlement Hourly	£0.00
01-Oct-2009	Annie Squirrel			4.00	Free Entitlement Hourly	£0.00
02-Oct-2009	Annie Squirrel		1.50		Gymnastics	£5.50
02-Oct-2009	Annie Squirrel		1.50		Afternoon Hourly	£3.50

The letterhead information is set up in setting details:

Home > Setting Details > Setting Details >

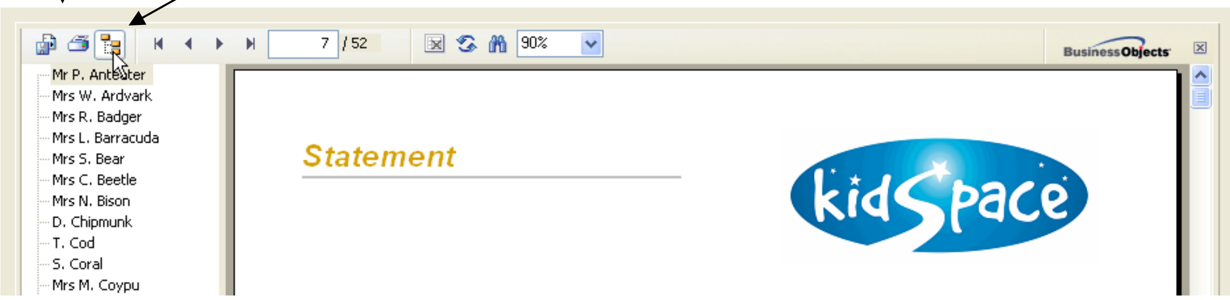
The first invoice number can be set up in setting details:

Home > Setting Details > Setting Details > Invoice Number button >

The custom text can be set up in:

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

To view one invoice click on the gold group button in the report toolbar and click on the family name in the list to the left side of the report.



EXERCISE

Look through the 30 September 2009 invoices (fully itemized) and answer these questions:

> **What are the dates spanned in this run of invoices?**
>
> **How much the does the Porpoise family owe?**
>
> **Do the Doormouse family owe any money?**
>
> **Which voucher company have the Whales been using?**
>
> **How did the Goose family choose to pay?**

Try viewing the invoices as ‘Summary Information Only’ and as ‘Daily Information’.

Finally delete the Invoice run using the delete button.

Invoice Batch Reports

The ‘Balance’, 'Sales' and 'Funded' buttons produce plain formatted summaries that accompany the invoice batch. These are suitable for use in spreadsheets.

If You Do Not Collect Any Fees

If you do not collect your own fees you may want to use the Setting Details > Setting Details > Advanced Button option to disable account balances

‘Disable balance accrual’ will zero the outstanding balances for all family accounts in the database.

The statements will not show a balance brought forward, just the fees payable this period.

Because the account balances will be wiped out permanently always make a backup before using this option.

28. Bank Runs - Paying In Money

SuperFox will help you prepare for a Bank Run (the “Bank Paying-In Summary”), keeping track of what has been paid in to the bank and facilitate a Bank Reconciliation.

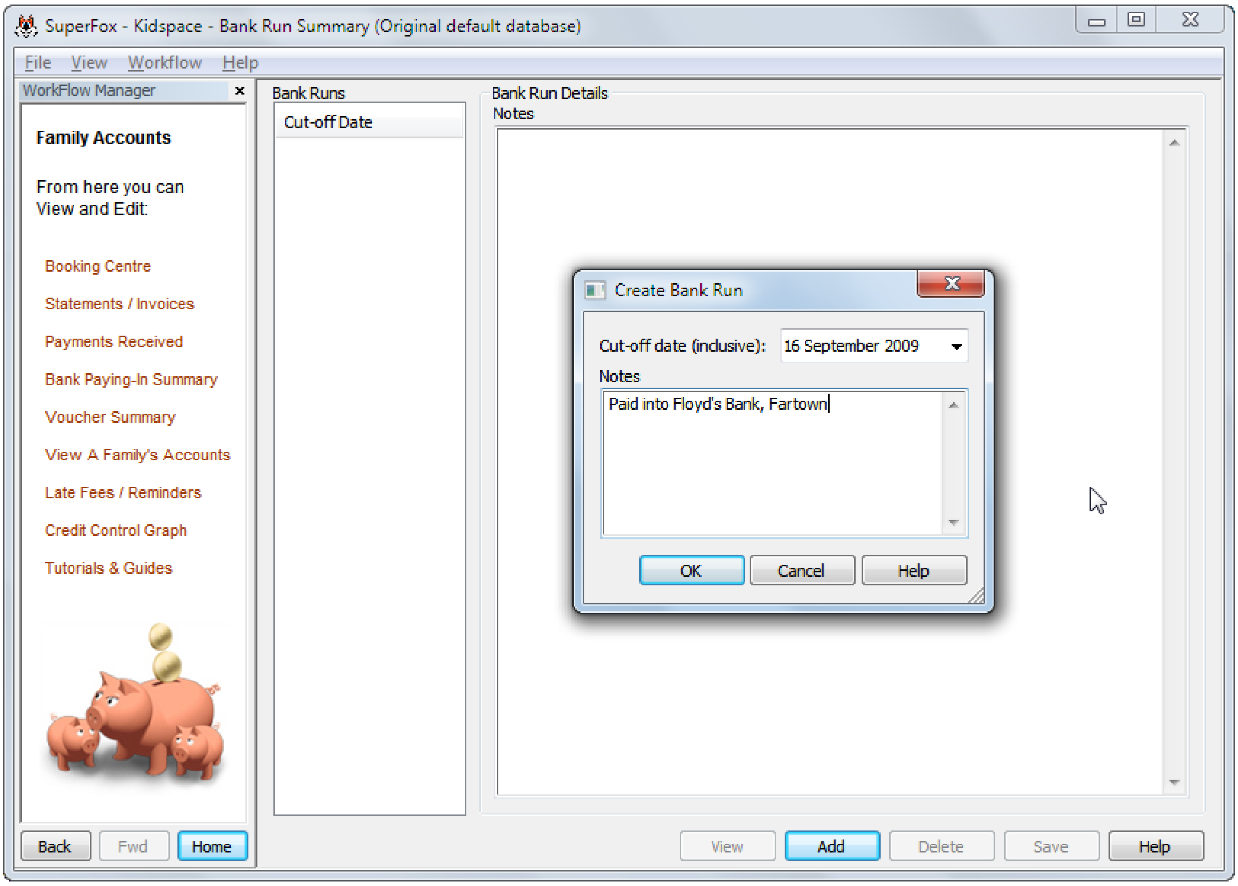
Details for the Bank Run are taken from the Payments Received records. These must be kept up to date regularly otherwise details will be missing in the Bank Paying-In Summary and from parent’s invoices and statements. (Vouchers are not included in the Bank Paying-In summary as you have to reclaim these separately.)

EXERCISE

Using Tutorial Dataset 3:

Home > Family Accounts > Bank Paying-In Summary > Add > enter Cut-off-date & Notes…

Enter 16 September 2009 > OK > View the report



The Bank Paying-In summary has three sections. The first two are designed to help with the ‘I filled in the paying-in slip wrong again’ blues. The third section summarises other payments received direct (standing orders, direct debits, BACS, etc.) from parents and is useful for bank statement reconciliation.

- A summary of cash payments received.
- A summary of cheques received.
- A summary of other types of payments received from parents (excluding vouchers).

29. Processing Vouchers (Optional: If Time Available)

SuperFox will collate Vouchers received and provide a summary of the voucher payments to reclaim or reconcile from each voucher company. This is a handy summary to use when reclaiming your vouchers received by whichever method you have agreed with the voucher provider.

The receipt of Vouchers must be recorded along with other cash / cheques etc in the "Payments Received" screen otherwise details will be missing in the Voucher Summary.

You generate the voucher runs in exactly the same way as you did for the Bank Paying-In Summary.

EXERCISE

Using Tutorial Dataset 3.

Home > Family Accounts > Voucher Summary > Add > enter Cut-off date and Notes > OK >

Tutorial: Produce a Voucher Summary with a cut-off date of 30 September 2009. Which voucher companies are we expecting to pay us?

Voucher Run Report

Busy Termites
The Penthouse
Termite Hill
Welly Garden City
Northamptonshire
AA1 9ZZ

Telephone: 01111 234567

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

OFSTED: EYC 98765
Charity No: 123456
Company No: 654321

Date: 30 September 2009

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Date	Name	Description	Amount
03-Sep-2009	Mr J. Whale (The Old Spooky Cottage)	ABC 12344556789 DE	£220.00
28-Sep-2009	Mrs A. Fox (16 Hillside)	ABC 1234567890 DE	£220.00
		Total:	£440.00

The program produces a separate summary for each company that has an active Voucher claim against its name during the run. Click the yellow tree button to select a given voucher company.

If you typed in the voucher number as the description when you used the 'Payments Received' screen, the voucher number will be listed in the 'Description' column of the Voucher Summary.

This is a pretty handy summary that will at least take some of the work out of reclaiming or reconciling your voucher payments.

30. Early Years Reports

SuperFox has several Early Years reports in:

Management Reports > Early Years Reports >

These include a milk claim report, a couple of Free Entitlement headcount returns and the pupil level data required for the Early Years Census.

Free Entitlements

Headcount Summary

Kidspace

Birth date range. From: 1 January 2003 To: 31 December 2004
Usage date range. From: 15 January 2007 To: 21 January 2007

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

Report date: 10 February 2011

Page 1 of 2

Surname	Forename	Midname	Date of Birth	M/F	SEN	Eth	Funded Hours / By Day		Total Hrs	Address	Town of Birth / Other Providers
Badger	Elizabeth	Blanca	19 Oct 2003	F	N	BCRB	7.50	M 0.00 Tu 0.00 W 2.50 Th 2.50 F 2.50	18.00	1 River Dale Foxholes Anytown Northumberland AA1 9ZZ	Anytown Happy Hippos
Barracuda	Kelly	Vanessa	10 Sep 2003	F	N	MWBC	12.50	M 2.50 Tu 2.50 W 2.50 Th 2.50 F 2.50	12.50	54 Deep Blue Drive Foxholes Anytown Northumberland AA1 9ZZ	Anytown
Beetle	Ralph	Rowen	11 Apr 2004	M	N	WBRI	7.50	M 2.50 Tu 2.50 W 2.50 Th 0.00 F 0.00	18.00	8 Woodside Foxholes Anytown Northumberland AA1 9ZZ	Fartown
Cod	Diana	Sandy	15 Aug 2004	F	N	MWBA	12.50	M 2.50 Tu 2.50 W 2.50 Th 2.50 F 2.50	12.50	109 Main Street Foxholes Anytown Northumberland AA1 9ZZ	Anytown Happy Hippos Dippy Ducks Clever Cats
Dingo	Benjamin	Don	18 Aug 2004	M	N	WBRI	12.50	M 2.50 Tu 2.50 W 2.50 Th 2.50 F 2.50	12.50	Old Kennel East Woods Anytown Northumberland AA1 9ZZ	Anytown

(Continued)

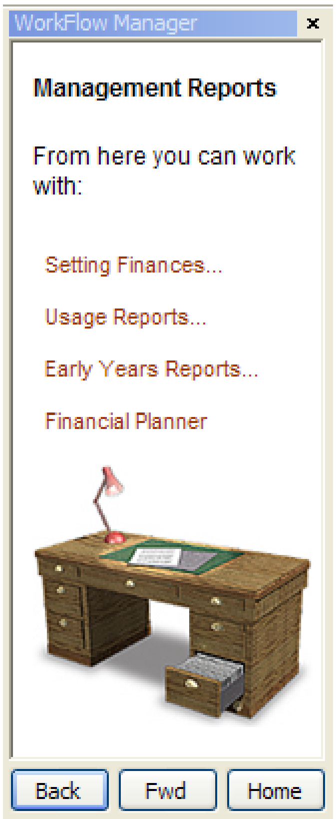
If you are in a workshop your tutor will demonstrate the Headcount Return. If you are working independently you might like to work through the ‘Headcount Returns’ Mini Guide.

31. Management Reports (Optional, if time is available)

SuperFox management reports can give you a good picture of who is using your setting and what is happening with the money. They are good tools for planning the development of the setting and can be very useful when applying for funding.

Where possible the SuperFox management reports use graphs that are easy to understand at a glance. The main management reports available in SuperFox include (there are others):

Setting Finances



This section includes a cash book type form to enter rent, staff costs and other setting income and expenditure which enables you to produce some basic financial statements (they do not replace your treasurer or accountant):

- **CASH FLOW GRAPH**

  Showing the change in a setting's cash and where it was made and spent over a date range.

- **PROFIT AND LOSS**

  A small wizard guided report showing key financial measures.

- **CAPITAL EXPENSES**

  Showing the setting's capital expenses and when they occurred over a date range.

- **REVENUE EXPENSES**

  Showing the setting's revenue expenses and when they occurred over a date range.

Usage Reports

- **USAGE BAR CHARTS**

  Showing attendances for a given date range in terms if fees and childcare hours provided.

- **USAGE PIE CHARTS**

  Showing setting use by service type, family, gender and age.

- **FULL TIME EQUIVALENT BAR CHARTS**

  Showing attendances in terms of FTE and the percentage of places occupied.

Early Years Reports

Milk claims, funded usage summaries for estimates & reclaims and the Early Years Census.

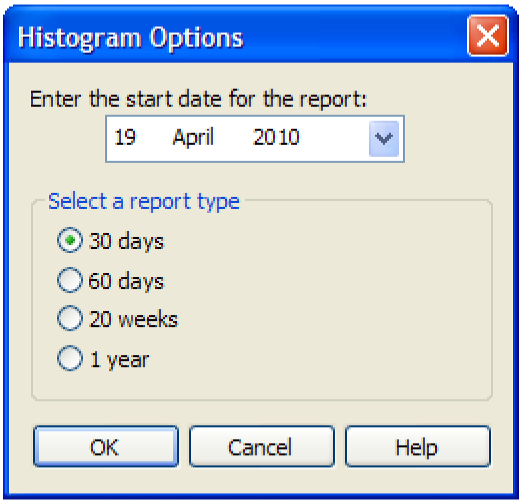
32. Example: Usage Bar And Pie Charts

We are going to start by taking look at just one of the many charts in SuperFox; the Usage Bar Chart.

Load Tutorial Dataset 3. (This has one year of attendances from September 2009.)

Home > Management Reports > Usage Reports > click on 'Usage Bar Chart' >

The Histogram Options form will pop up and ask you to select the start date and the date range that you would like to use for your Bar Chart.

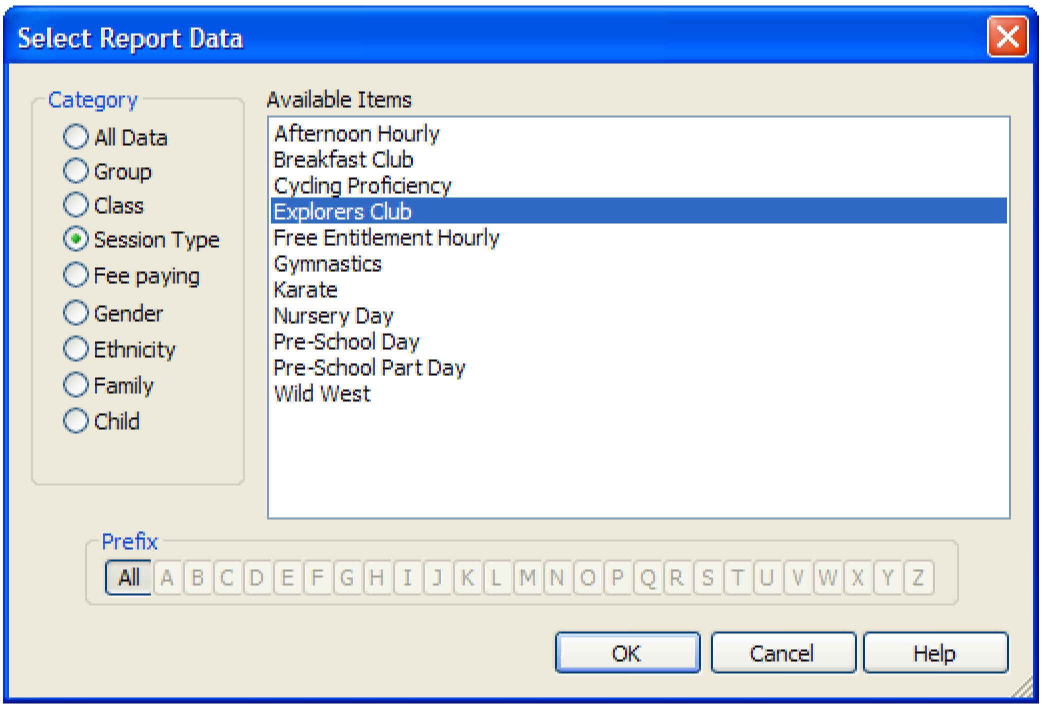


The date control works in the usual way. The date ranges that you can choose to plot are:

- 30 Days (Useful to show one month)
- 60 Days (Useful to show a half term)
- 20 Weeks (Useful to show a term)
- 1 Year (Useful to show annual usage trends)

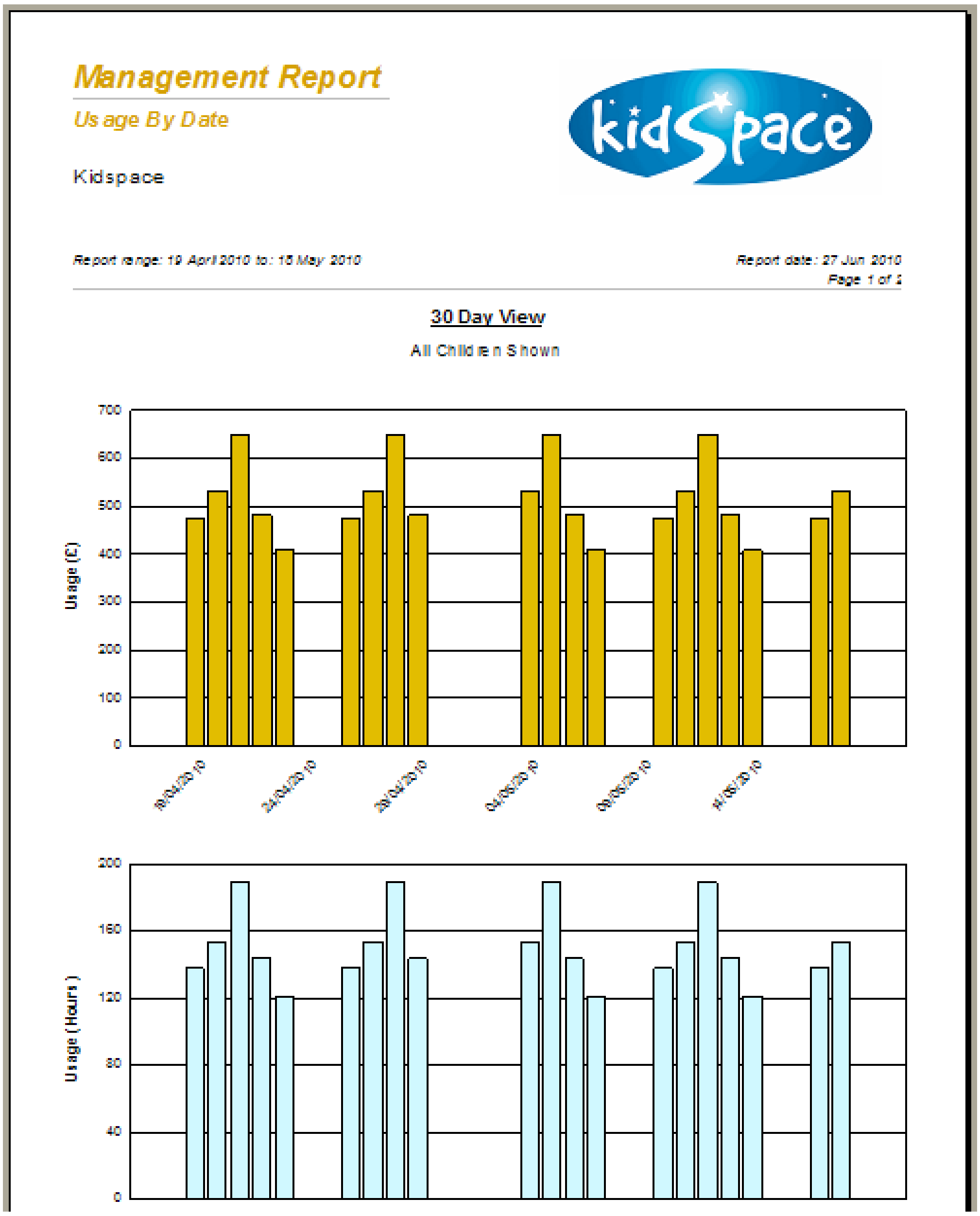
Choose 19th April 2010, a 30 day date range and click on the 'OK' button to continue.

The 'Select Report Data' form will now be displayed. Use the radio buttons to select the data to plot. (The example below would produce a report based on attendances at the 'Explorer's Club'.)



Choose 'All Data' and press the 'OK' button

SuperFox will then generate the Usage Bar Chart that looks like this:



The top bar chart shows usage in terms of fees charged. These figures are taken from the invoiced sessions and include the reimbursement value of the Free Entitlements. (Although you are not charging families for the Free Entitlement the setting is still earning money for providing the service.)

The bottom bar chart shows usage in terms of hours of childcare provided, they are not necessarily the same, especially if sessions have a range of hourly costs or if discounts are used.

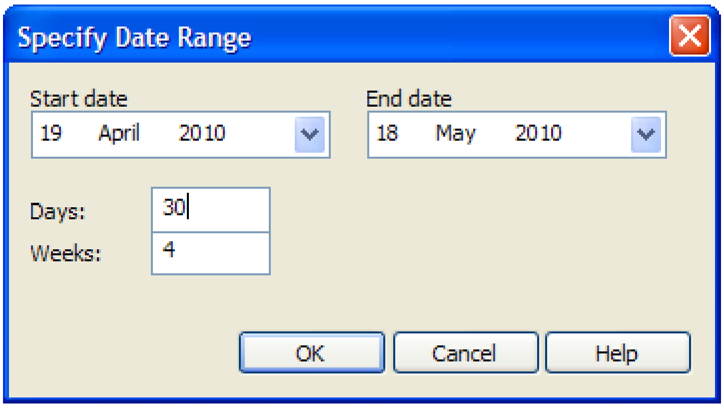
You can see that there is a difference in the amount of childcare and income generated between days of the week. (You can also see the May Bank holiday in the middle of the date range.)

A table showing the numeric value of each bar is given on the second page of this report.

Now that we have had a look at the amount of daily usage, it would be helpful to know just how the setting is being used during this period.

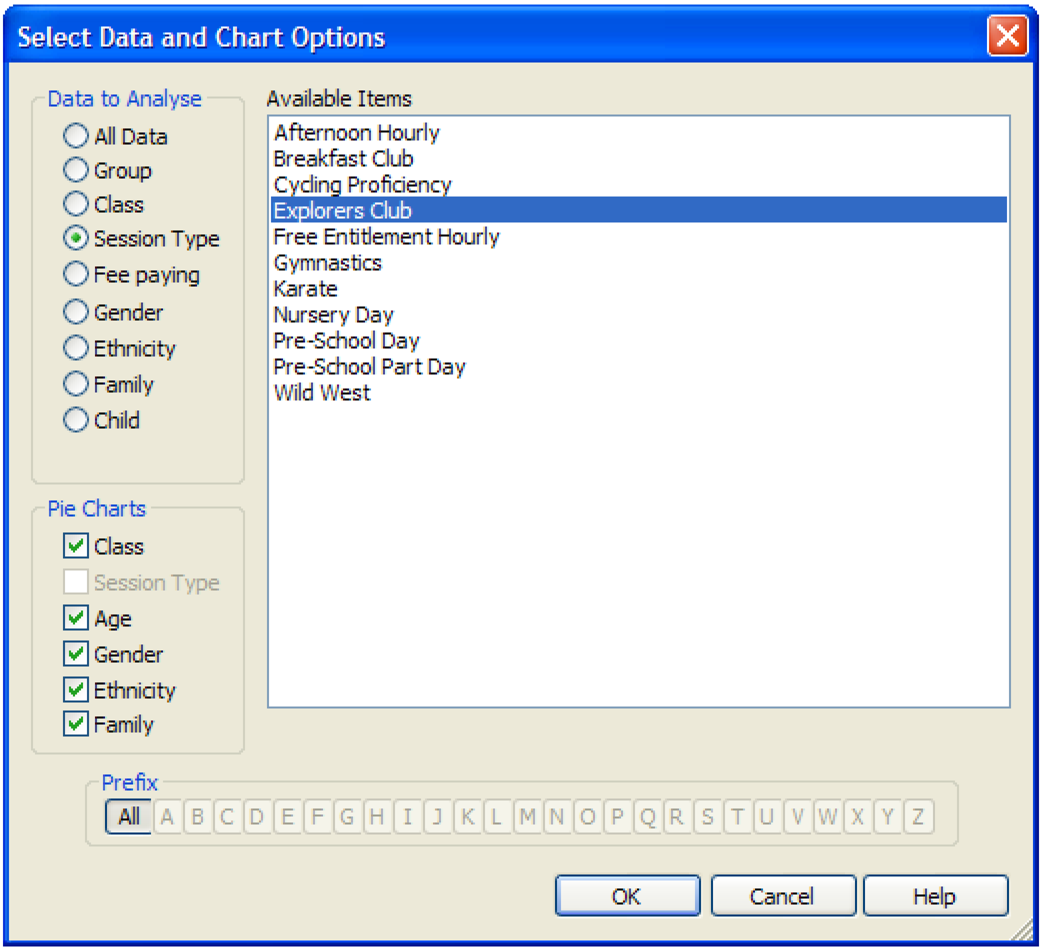
Home > Management Reports > Usage Reports > click on 'Usage Pie Chart' >

Choose the same 30 day date range from 19 April 2010 to 18 May 2010.



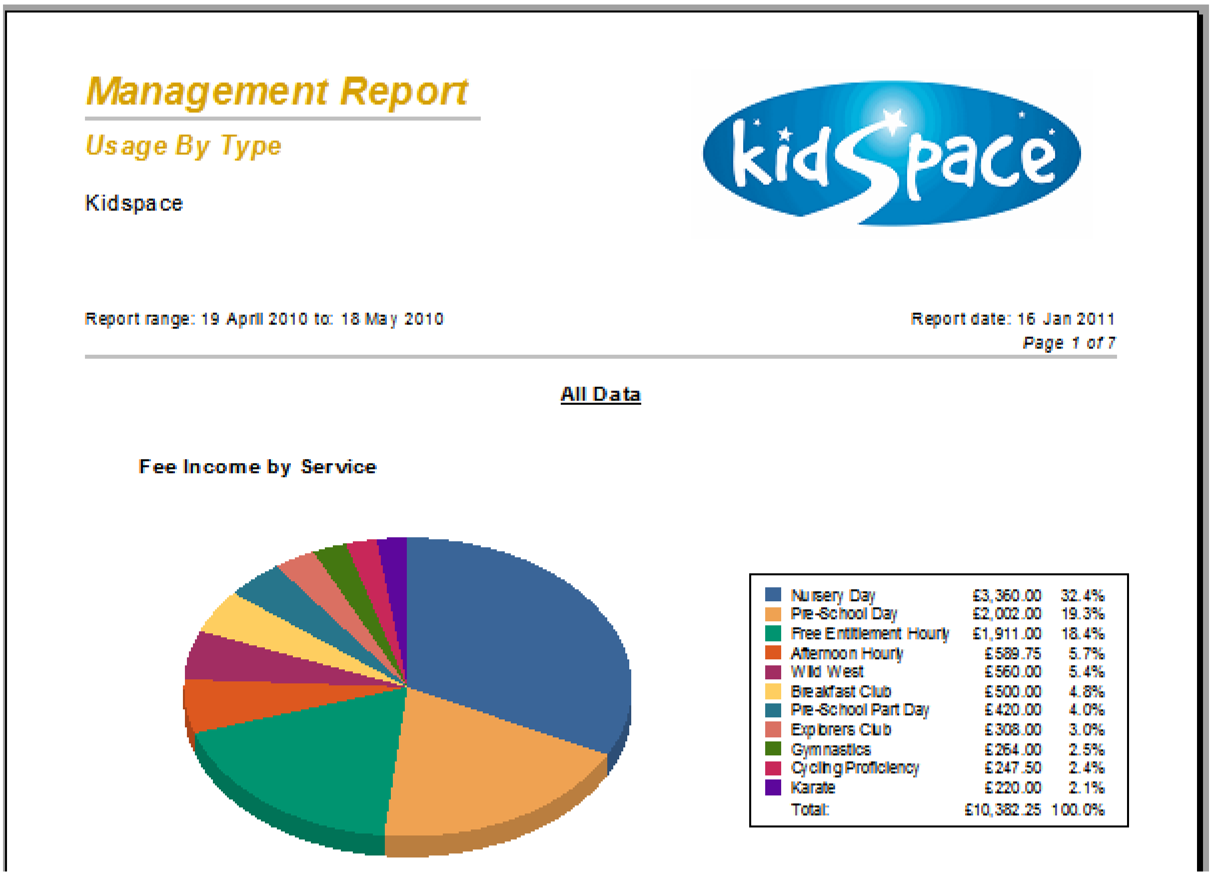
The 'Select Data and Chart Options' form will now be displayed. Use the radio buttons to select the data to plot. (The example below would produce a report based on attendances at the 'Explorer's Club'.)

You can also use the ticked check boxes to choose which pie charts that you would like to produce (Options that would always produce undivided pie charts are greyed out.)



Choose 'All Data' and press the 'OK' button

SuperFox will then generate the Usage By Type pie charts that look like this:


Management Report

Usage By Type

Kidspace

Report range: 19 April 2010 to: 18 May 2010

Report date: 16 Jan 2011

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All Data

Fee Income by Service

Nursery Day	£3,360.00	32.4%
Pre-School Day	£2,002.00	19.3%
Free Entitlement Hourly	£1,911.00	18.4%
Afternoon Hourly	£589.75	5.7%
Wild West	£560.00	5.4%
Breakfast Club	£500.00	4.8%
Pre-School Part Day	£420.00	4.0%
Explorers Club	£308.00	3.0%
Gymnastics	£264.00	2.5%
Cycling Proficiency	£247.50	2.4%
Karate	£220.00	2.1%
Total:	£10,382.25	100.0%

The report contains two sets of pie charts:

- Set 1: Fee Income by…
- Set 2: Hours by…

This is the same idea as used in the Usage Bar Charts. The first set of pie charts tells you about how the setting income was generated. And the second set tells you about the hours of childcare delivered.

If you have produced the pie charts showing usage by ethnicity then the last page of the report will summarize the ethnicity codes that appeared in the report.

The bar and pie charts are good communication tools that are well suited for use in management meetings attended the setting treasurer and senior childcare staff.

It is easy to see the connection between what is happening in the setting and the setting's financial performance and to use this information to guide the setting's development plans.

33. Backup Your Data Frequently!

Every time you have entered any data that you would miss (like the month's attendances) keep your work safe by making a backup.

You should also make a backup if you are about to upgrade SuperFox or try out a new function for the first time

The backup files are not big and individual files can easily be deleted when you are sure they are no longer needed.

Important Tip - Take Backups Off Of Your Computer

Sometimes bad things happen to good computers!

It is surprisingly easy to kill a computer. They sometimes catch viruses or simply stop working. We have even filled one with coffee.

Do not rely on backups stored on the computer. We recommend that when you make a backup you move the file off of your computer, for example using a USB flash drive.

Important Tip – Keeping Backups Off Site Is Good

Sometimes bad things happen to good settings!

If you are unlucky your computer could be damaged or stolen. Every year a small number of settings flood, catch fire or are burgled.

If you do not have a fire and flood-proof safe it would be best to keep a copy of your backup files at a different secure location.

Notes

We do not currently recommend using an on-line file store for storing your backups unless you are completely confident about the service's security and availability.

In order to make a backup you will need to be using SuperFox from a user account with Windows Administrator privilege.

Remember to set the SuperFox passwords for the each database to help keep the backed up data safe.

SuperFox will offer to make backups before performing some operations and before you exit the program. It is also easy to make a backup whenever you like.

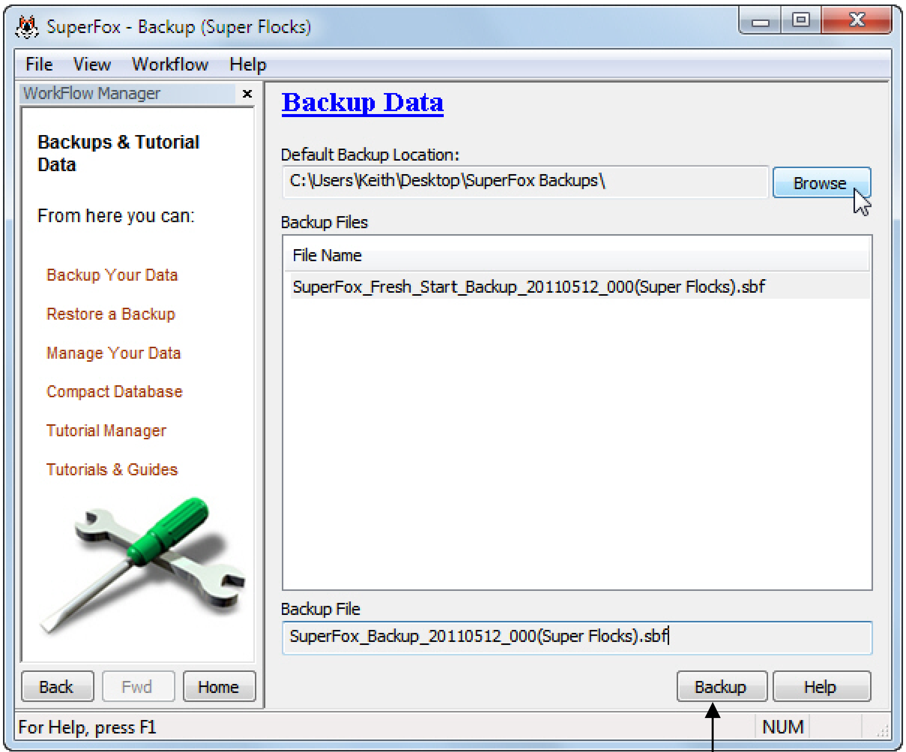
Go to the Backups & Tutorial Data Section and select the 'Backup Your Data' option.

Home > Backups & Tutorial Data > Backup Your Data >

Use the 'Browse' button to find or make a folder on your computer to use for the backup.

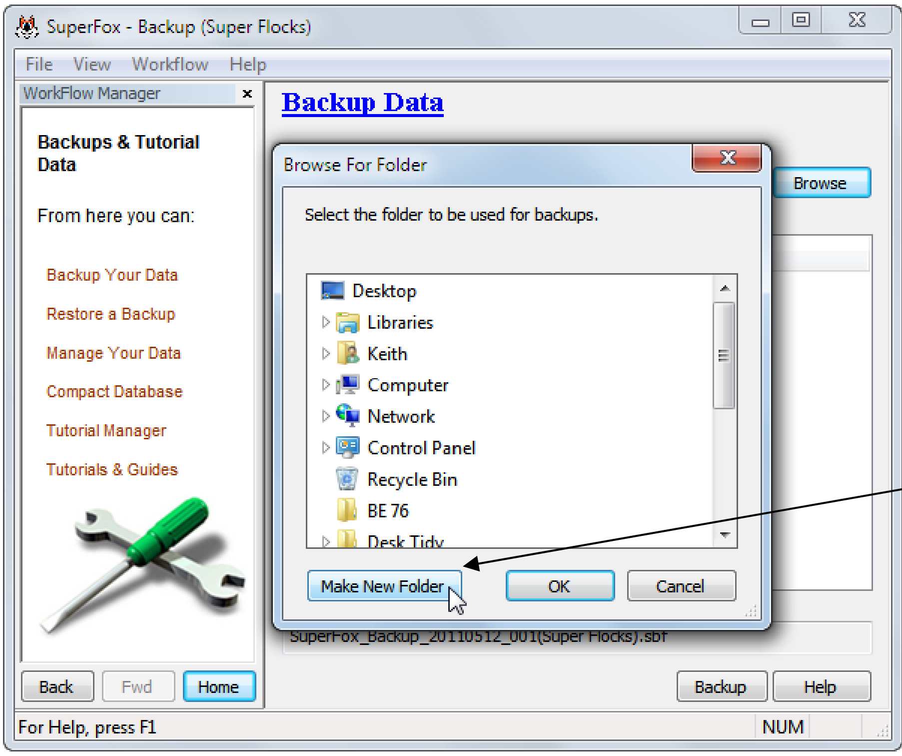
SuperFox will remember the folder that you choose or make and it will continue to use it for backups until you specify a different folder using 'Browse'.

You can include a 'friendly name' to include in your backup file name which is very useful if you deal with more than one setting.



When you have chosen a folder go ahead and click on the 'Backup' button at the bottom of the screen. SuperFox will create your backup file and confirm that the backup was made successfully.

If you wish to put the backup file in a new folder simply use the 'Make New Folder' button while you are browsing as shown below.



Backup File Names

SuperFox backups now all contain a Date, Number and a Name to help you to find the backup that you need to restore in the event of a problem.

e.g SuperFox_Backup_*Date_Number(Name)*.sbf

Date

This is the date that the backup was made. The date is written ‘backwards’ with the year followed by the month followed by the day.

The date as: yyyymmdd e.g. 20110621 is 21st June 2011

This ensures that more recent backups will appear at the top of folder lists if you have many backup files with similar sounding names.

Number

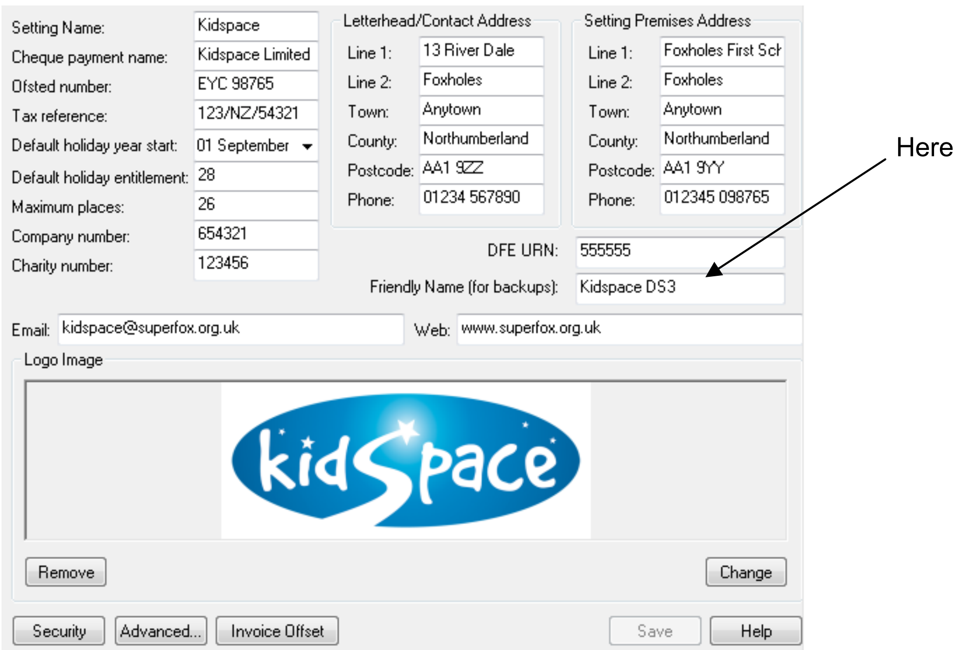
It is important to be able to see which backups came first or last if you make several backups that have the same name in the same folder on the same day. SuperFox uses a number from 000 to 999 to show the order in which the backup files were created.

e.g.	SuperFox_Backup_*date*_000(*name*).sbf	first
	SuperFox_Backup_*date*_001(*name*).sbf	second
	SuperFox_Backup_*date*_002(*name*).sbf	third

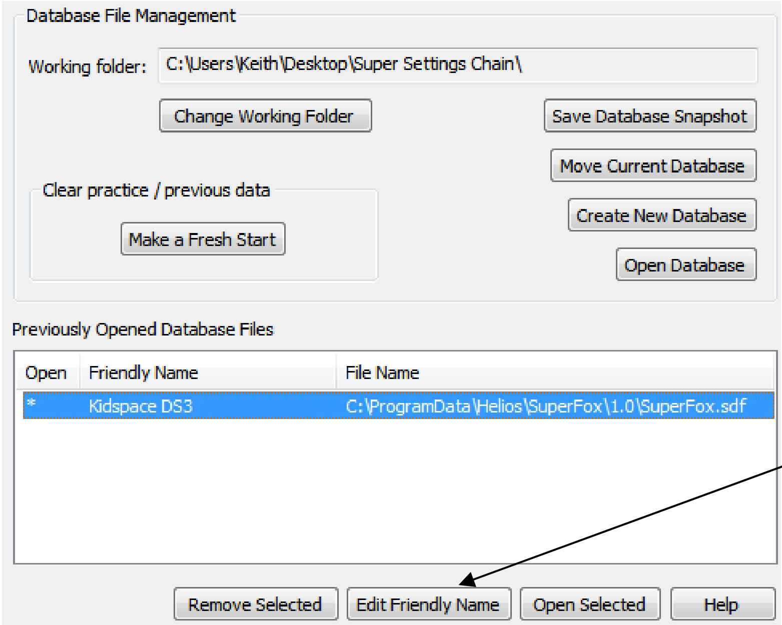
Name

This is a friendly name that you can give to the database which can be set up in either of two places the program (both places do the same thing):

1) *Setting Details* > *Setting Details* >



2) *Backups & Tutorial Data > Manage Your Data >*



Here

We highly recommend setting up setting friendly names to use with the setting's files. Friendly names are useful to everyone, and especially useful for users with multiple settings.

Please read the Data Backups mini guide for more information about making and restoring backups.

34. Compacting the Database for Speed

It is a worthwhile exercise to occasionally compact the database. This can improve the speed of operation and keep the database file to a reasonably small size. It is something that you should do about once every year, or if you notice the program starting to slow down a bit for example when you are entering bookings.

Important - You should always take a backup prior to compressing the database!

To compact the database:

1. Home > Backups & Tutorial Data > Backup Your Live Data > make a backup

2. then still in Backups & Tutorials > Compact Database >

When SuperFox has finished compacting the database it will display a small message to confirm that the compact operation is completed.

Note:

You will need to run SuperFox from an account with Windows Administrator privilege to compact the database.

35. What To Do Next?

During this tutorial we have looked at some of SuperFox's main features including:

- How to find your way around the program.
- Where to find help.
- How to enter family details.
- How to work with bookings and invoices.
- How to prepare Free Entitlement returns and some management reports.

There are many other functions in the program and these include:

- Flexible room planning, capacity planning and staff scheduling.
- Setting manager and staff diaries.
- Staff holiday, sickness and absence tracking.
- Gross pay statements
- A financial planner

If you like the look of the software and might want to use all or part of it in your setting please spend some time practising with the Tutorials and Mini Guides before working with your setting's live data. Good places to start are:

1) Use the Quickstart Tutorial and Mini Guides that are included with SuperFox.

The Quickstart Tutorial is a slightly longer tutorial that covers more of the program functions. The Mini Guides cover major functions in more detail than the tutorials. They include step-by-step instructions and worked examples for important topics. Remember that you can read and print the Tutorial Mini Guides from the Tutorials & Mini Guides section of the program or from the Windows Start menu.

2) Try running in parallel with your existing system.

It is a good idea to run SuperFox in parallel with your existing administration system for a while to help you to become confident in it's correct use. If you have been running in parallel with an existing system you can wipe out your practice financial information, still leaving the family, staff and service data intact using

Backups & Tutorial Data > Manage Your Data > Fresh Start button >

And of course, remember to take frequent backups!

THIS IS THE END OF THE "Quick Start" TUTORIAL