Quick Tour for Online River Software 12.x

Overview from Main Menu

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1. Enter customer information in both the Customers* and Customer Info* screens
2. Set up retail and administrative products in Products screen.
3. Set up activities, classes, memberships or packages in Activities* screen, and then click the Sign-up (Registrar) button in Customer* screen to register.
4. Set up your program preferences and letterhead in Customize screen.
5. Click Schedules button to create appointments and/or reservations.
6. Click POS button from Main Menu to sell items to non-account holders
7. Click Account button in customer screen to create an invoice in an account.
8. Check-in, or Check-out customers, or take attendance, using Check-in* button.
9. Create a form letter or an email text from Documents.
10. Set up staff information in Staff, with or without user-passwords.
11. Enter vendor information in Phonebook, and link to Products.

Depending on specific software title:
Customers button may also be named Members, Students, Clients, etc.
Activities button may also be named Classes button.
Check-in button may also be named Attendance.

1. Customize

From Main Menu, click the Customize button to set up your program preferences. Click the Set Letterhead Preferences button to enter your company information for printing on invoices, receipts, documents and emails. Click the Set Billing Preferences to enter your local tax rate(s) and bank information (if using EFT for recurring transactions). Click Set Schedule Settings to change schedule titles, time increments, and to create "groups" of schedules.

2. Products

From Main Menu, click the Products button and set up both inventory items, and administrative products (click the no-count checkbox). Use the Category field to indicate financial categories to generate a Category Report to analyze your sales numbers. To set up a product being sold or invoiced from Schedules, click the Preset button. If inventory item, enter Quantity on hand, a low quantity at which point you may need to reorder, and a reorder number so you can restock. The program will track your inventory. Print an Inventory Summary Report from Products List to get updates, along with a Reorder Report. *Note: UPC bar codes can be scanned into the Product ID field. You can also create your own Product ID, and print your own bar code labels.*

3. Activities (memberships, classes, treatments, sessions, service packages)

From Main Menu, click the Activities button (or Classes), and select from the dialog options to set up memberships, classes, packages, treatments, etc. If needed, set up this activity as a Recurring Charge with a number of payments (or with continuous billing), or you can base the billing on a number of visits (countdown), with or without, specifying a duration.

4. Customers (members, students, clients, etc.)

From Customer* screen, click the New button to create a new customer. Enter contact information. Click the Customer Info screen at the top to set up Start and Expiration date if required. Click the Account button to set up a Billing Contact or set Self (customer pays for themselves). Click the Account button again and choose to invoice this customer for one or more items, and then go their Account. Click Transaction Complete after creating an invoice.

5. Registering, or Signing Up for Activities (memberships, classes, packages, etc.)

From Customer screen, click the Registrar button (also named Sign-Up) at the top left, and follow prompts to sign up the customer for the activity. Once you select the activity, click the Continue button to create an invoice. You can add multiple registrations to this one invoice. Click Transaction Complete when ready to bill the account. Once in the Account, click the Enter Payment button to enter the payment. *Note that if this is a Recurring Charge you can click the Payment Plan button at the top left of the screen to see it has been automatically set up for the account. You can adjust the Billing Date.*

6. Customers List (members, students, clients, etc.)

In the Customer screen, click the List button on the top right to view a list of customers. At the bottom of this screen there are buttons to find Active customers, Inactive

customers, etc. Check the Mark checkbox, and click the Find Marked button to gather records together. Click the "X" on the far right of each record to omit that record from the list. Click the column header-buttons to sort your data. Click the Documents button to print or email a document as a PDF (requires FileMaker 11 license). *Or you can click the Export button to use email addresses with a service like www.constantcontact.com.*

7. Accounts

In the customer's account, click either the New Purchase, or Enter Payment button to enter a transaction. Both purchases and payments display in the two small lists in the center of the screen. In the account, you can issue a Refund, a Credit, a Late Fee (automatically or manually), and prepare a Billing Statement (automatically or manually). Click the EFT button to set up a recurring use of a checking account or credit card for recurring use in batches (requires a bank or billing service to process). Click the Get Card button to sell a Gift Card, or set up a Loyalty Card and track and redeem points earned towards a discount on purchases made in an account.

8. Accounts List

Click the List button in the Account, or from Main Menu click the Accounts button to go to the Accounts List. Click the Past Due Accounts button at the top to instantly view past due accounts. Click the Summary button at the bottom to summarize accounts receivables and balance owed. Click the Transactions button in the yellow bar to process EFT transactions. Click the Reports button in the yellow bar to generate financial reports by date or date range in summary or detail.

9. Schedules

From Main Menu click the Schedules button to enter a reservation or appointment. Click on a time slot to enter the appointment. Use color codes and adjust the duration of the appointment. You can repeat the appointment, and link names from your database to the appointment. Use the Code field to indicate staff initials or the number of customers associated with the appointment. Preset appointments are set up from the Products area of the screen and can be invoiced to the customer's account from this screen by clicking the Account button. From the Schedules screen, you can click List for a different view. You can add additional schedule columns (optional) and create groups of schedules to partition the total number of columns. *Note: If you check the Events checkbox at the top, you can now access this event from the Events button on Main Menu (from most software titles).*

10. Check-in, Attendance

From Main Menu, click the Check-in (Attendance) button. You can scan an ID card or key tag with a bar code (eight digits) to check-in, or check-out customers. Click the Add "customer" button at the top to check-in or check-out a customer manually. Click the Check-out button on the left side to check-out the customer. Click the Unattended Check-In button on the left for Unattended Check-in and Unattended Check-out screens, where you may use a touch-screen for self check-in and check-out. Countdowns (both General and Specific) will display along with other alerts and messages. Click the Reports button to generate Attendance Reports including a Total Time Report. *Note: Set up an Activity called "Employee Time Clock" and you can track employee time. Note staff will need to set up as "Customer*" to use the check-in, check-out features.*

11. Rosters

If you have registered or signed-up customers for an activity or class, you can print a list (roster) of who is scheduled to attend with date-sensitive Rosters. Adjust settings in Customize to vary information included on the printed Roster. Use the date button in the Roster screen to review number of individuals on each roster day by day. Hold the Shift Key down to scroll week by week.

12. Point of Sale (POS)

Use the POS screen for retail sales when a customer does not have an account, or is not a regular customer, or if you have a retail store. Purchases and payments will be indicated as POS transactions in your financial reports. Click Account button if you would like to put a transaction on an existing account. *Note: Click the Get Card button to redeem existing Gift Card amounts towards a purchase.*

13. Staff

From Main Menu, click the Staff button. If you are the only user, a staff log-in and password do need not be created. Only if you would like to limit access of one or more staff should you create a log-in and password also for yourself (owner/administrator). In that case, click the Permissions button in Staff, and set up your own permissions with all checkboxes checked (one staff must have all permissions checked). Then create a second staff member and uncheck the permissions which you do not want them to have access to. Assign a log-in name and password for each staff member using the program.

14. Documents

Create a form letter or email text by clicking the Documents button from Main Menu. Then from the Customer* record, click the Documents button in the yellow bar to send an existing form letter or you can create a new one for this customer. From the

"customer" List, click the Documents button to review existing documents sent to all customers displayed, or to send a document to all records on the displayed list.

15. Phonebook

Use the Phonebook to set up your vendors' information. Link a vendor to a specific product set up in Products, by clicking the Link Product button at the top of the screen (you need to first initiate from Products).

One-Time Visual Setting

Depending on the size of your monitor, the outside program window may expand out to the right and down, creating a white border.

If you would like to adjust this, simply grab the bottom right corner of the screen and drag it up and to the left so it now lines up "flush" with the right and bottom borders of the blue border of the Main Menu screen.

Note: If you then exit and reopen the program, it will memorize this new setting.

To <u>View Online Video Tutorials</u> at www.YouTube.com, enter the following URL in your browser:

http://www.youtube.com/user/OnlineRiverLLC?ob=0&feature=results_main