



## Getting started:

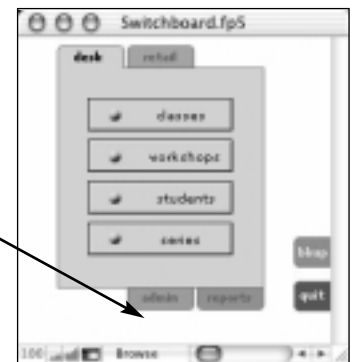
Octo-assist is designed to avoid double entry of key pieces of information, with automatic data entry in specific places to avoid improper data entry. It requires initial entry of data but this enables the data to be recalled automatically later on in the process, saving both time and money.

## Configuring Octo-assist:

1. For Filemaker versions, open the file called *Switchboard*. For stand alone versions, open the file called *Octo-Assist*.

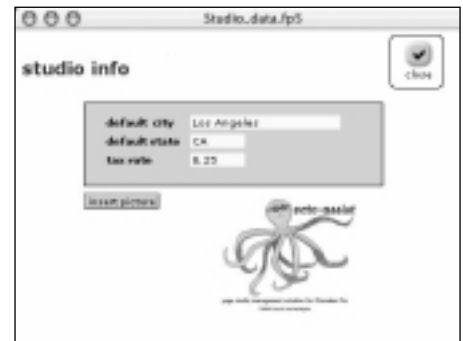
This is located in the main *octo-assist* folder and is how you access the entire *Octo-assist* program. You can make an alias (or a shortcut) of the *switchboard* (*Octo-Assist* for standalone versions) file on your desktop for easy access. The switchboard has four tabs: 'desk', 'retail', 'admin', and 'reports'.

The first tab you need to configure is 'admin'. On the switchboard click on the green tab that says 'admin' in the bottom left corner. The five sections within 'admin' are 'schedule', 'teachers', 'class prices', 'series types' and 'studio data'.



2. Click on 'studio data' from the switchboard.

These default fields are to make data entry easier later on, and may be left blank if necessary. Enter in the information. The tax rate will be used in calculating sales tax in the retail section. Click on the 'insert picture' button if you'd like to see your logo on the reports. You will be prompted to locate your logo on your hard drive.



3. Return to the switchboard and click on 'teachers' from the switchboard. You will see the teachers info file.

The 'teachers' file has two views, info and view. Navigate between these two views using the green buttons at the top of the screen.

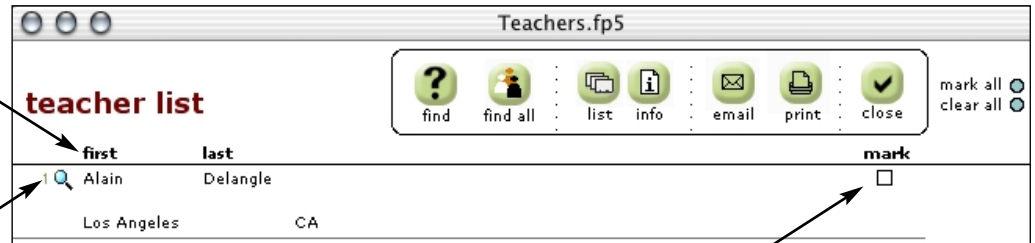
Info view: To create a new teacher make sure you are on info view and click on the 'new' button. Once all the information is filled out you can either close the window using the close button or add more teachers to your roster. Pay rate is the amount the teacher gets paid to teach a class. If your teacher gets a bonus for every extra student over a certain amount of students, enter the bonus rate and the base number of students. Pay rate (sub) is the amount the teacher gets paid as a substitute, and cancel rate is the amount the teacher gets paid if the class is cancelled. If these amounts are the same, you should enter the same number in the pay rate, pay rate (sub) and cancel rate fields.





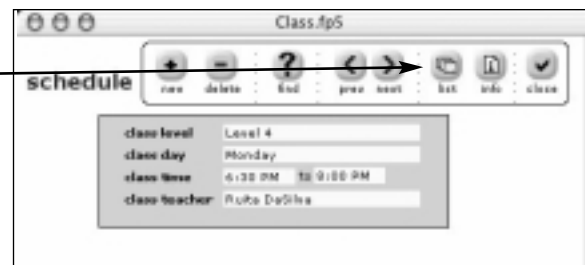
Teachers List view: This view shows all teachers in a printable list form.

You can sort by first or last name, email address or whether they are marked or not by clicking on the category headers above the names. For easy viewing, you can click on the magnifying glass icon to the left of each name to switch to the Info view. To send an email, mark the record by clicking on the mark checkbox in the right side of each record. To mark all, use the 'mark all' button to the right of the green navigation buttons at the top of the screen. Click on email to get to the email form, enter your subject and message and click on 'send email' to launch your email application and proceed as if you were sending a regular email.



4. Return to the switchboard and click on 'schedule' from the switchboard. You will see the schedule file.

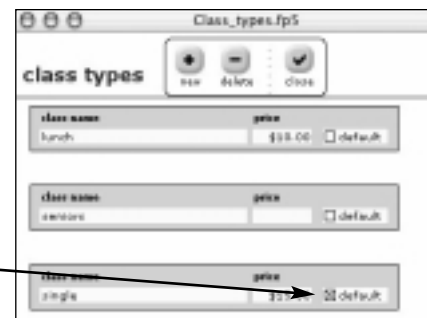
The 'class' file has two views, info and view. Navigate between these two views using the green buttons at the top of the screen. The list view allows you to see all the classes at a glance and sort according to day, time and teacher.



The schedule is your class schedule for classes that happen on a regular basis. To add a class you click on the 'new' button at the top of the screen, then enter the name/level of the class in the 'class level' field. The 'class day' field is a pull-down list of the days of the week. The 'class time' fields are for entering the beginning class time and the ending class time. The 'class teacher' field is another pull-down list based on all the teachers you have entered in the 'teachers' section. Only teachers that have been added to the 'teachers' roster will be available. Continue configuring your schedule by adding new classes with the new button or close the screen with the close button when you are done.

5. Return to the switchboard and click on 'class types' from the switchboard. You will see the class types file.

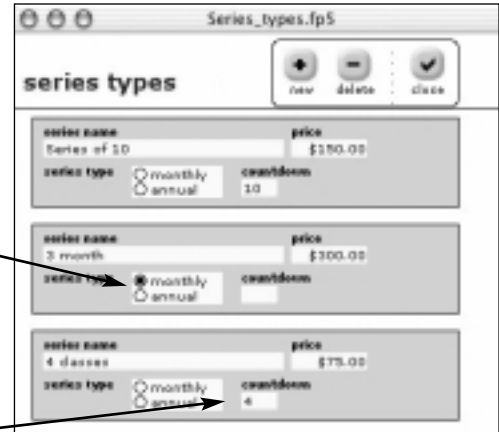
The class types area is where you set up different types of classes your studio offers and the appropriate charge. For instance, your studio offers a regular class for \$14.00 and a community class for \$7.00. In this section you click on the new button to add a regular class and in the "class name" field you enter "Single Class" and in the price field you enter "14" (the currency format will happen automatically). If this class is the most common type of class taken, you can click on the default checkbox so that the "Single Class" type will be entered by default when you check in students. Similarly, this is helpful if you only offer one type of class. Then click on the "new" button again and in the blank record enter "Community Class" in the "class name" field and "7" in the "price" field. If these are all the types of classes your studio offers then you are finished, otherwise you can continue the same process entering in the class name and price for each different class you offer until you have covered all your class types. When you are finished you can close the window with the "close" button at the top of the screen.





6. Return to the switchboard and click on 'Series types' from the switchboard. You will see the series types file.

The series types area is very similar to the class types area, it is where you enter the different series your studio offers. You create a new record for each type of series then name it and set the price. For monthly and annual unlimited series, you need to set the type of series (i.e. monthly or annual) and leave the countdown blank. If your studio offers other unlimited series (for example 2 months, 6 months etc.) check the "monthly" radio button and leave the countdown blank. You will need to manually adjust the expiration date of these series when you sell the series. (Note: we will be addressing this issue in the next version of Octo-Assist) For countdown type series enter the starting number in the countdown field. For example, if you offer a series of ten classes, you would create a new record and enter "Series of 10" in the class name field, then the appropriate price in the "price" field, leave the series type radio buttons unchecked and enter "10" into the countdown field.



7. Return to the switchboard and click on the grey tab that says 'retail'. The two sections within 'retail' are 'purchase' and 'product prices'. Click on 'product prices' to set up your retail section.



The product prices area is where you configure your retail inventory. The 'products' file has three views, history, list, and info. Navigate between these three views using the green buttons at the top of the screen. There will already be one record present, for a gift certificate. If you do not plan to use gift certificates, you can delete this record.

Info view: To create a new product make sure you are on info view and click on the 'new' button. 'Product identification number' is your internal id system, this field must be unique. Continue entering in the price you are selling at ('sales price') and the price you buy

at ('wholesale price'). Click on the 'no tax' checkbox if you do not want to charge tax for this product. Vendor info is entered on this screen as well, click on the envelope icon next to email and it will open your email application and prepare to send your vendor an email.

List view: This view shows all products in a list, for easy viewing. You can click on the magnifying glass icon to the left of each product to switch to the Info view. You can click on the categories above the records to sort by ID # and Product name.

History view: This view shows each product's sales history and keeps track of inventory. To set up inventory, enter the date of inventory and the quantity on hand. Click on the clock button to calculate the quantity remaining.



## Entering student data:

On the switchboard click on the grey tab that says 'desk' in the top left corner. The four sections within 'desk' are 'classes', 'workshops', 'students', 'series'.

1. Click on 'students' from the switchboard. You will see the students info file.

The 'students' file has three views, history, list and info.

Info view: All fields within 'students' should be self-explanatory. Enter a universal discount percentage for a student to receive this discount on ALL classes AND series. Do not enter a number here unless you want the student to receive this discount ALL THE TIME.

List view: Similar to the list view in the 'teachers' file, this shows all students in a printable list view, with the same email capability.

first	last	zip	series start	series end	countdown	mark	email
1 Q barb	grever		5/15/03	6/15/03		<input checked="" type="checkbox"/>	bg@yahoo.com
2 Q panda	bear		5/15/03	11/15/03		<input type="checkbox"/>	
3 Q mr	head					<input type="checkbox"/>	

You can click on the categories above the records to sort by first name, last name, zip code, series start date, series end date, countdown, marked records and email address.

History view:

This view shows the history of the student, including his/her status if they are on a series. Click on the clear status button to clear the student's current series status. If there has been a discrepancy with the countdown in the number of classes taken off of a series, you can enter in the correct number in the countdown field. To the left of each class is a magnifying glass that will take you to the detail of that transaction.

date	class	activity	payment	total
5/25/2002	level 1 with Nancy Sandcock	Single class	corp	



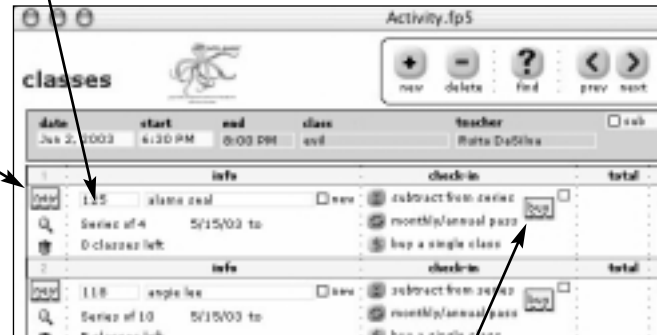
## Entering a class:

1. Click on 'classes' from the switchboard.

You will see the 'classes' file. Click on the 'new' button to create a new class. Select the date and starting time of the class. The end time, class name and teacher should automatically fill in from the schedule information you entered. If a sub is teaching, click on the sub check box and then select the sub name from the pull down menu. If the class is cancelled, click on the cancelled check box.

Begin entering students by clicking on the first rectangle under the info section of the class roster.

Type in the first letter of the students first name and the pop up list will jump to that section of the alphabet. If the student is not in the list, click on the 'new' card icon and the 'students' file will open and allow you to enter the personal info for that student.



The next section checks the student into the class. If the student is subtracting from a series, click on the 'subtract from series' button. If the student is on a monthly or annual pass, click on the 'monthly/annual pass' button. If the student would like to purchase a series, click on the 'buy' icon.

See the Buying a Series section below to continue with buying the series. If the student would like to pay for a single class, click on the 'buy a single class' button and the activity detail file will open so that the details of the transaction may be entered.

Click on the 'type of class' field to select which type of class it is.

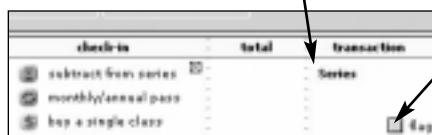
Select the payment method, enter gift certificate number if appropriate (the gift certificate \$ amount will automatically be entered).

Add a one-time only discount here. This discount applies only to this transaction.

Finally, hit the 'get total' button in order to check the student in and calculate the correct total. If you do not hit the 'get total' button this transaction will not show up in your reports!

Click on the 'flag' checkbox to flag this as a problem transaction. Enter the problem/details in the box below.

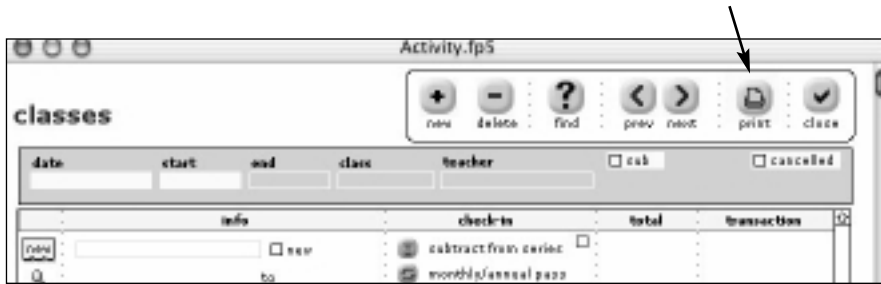
Return to the class file and you will see a blue word under the transaction section signifying that the student is successfully checked into the class.



An alternative way to flag the transaction is to click on the orange flag button in the bottom corner. Once a transaction is flagged, the red checkbox will be checked.



To print out the class report for this class only, hit the print button at the top of the page.

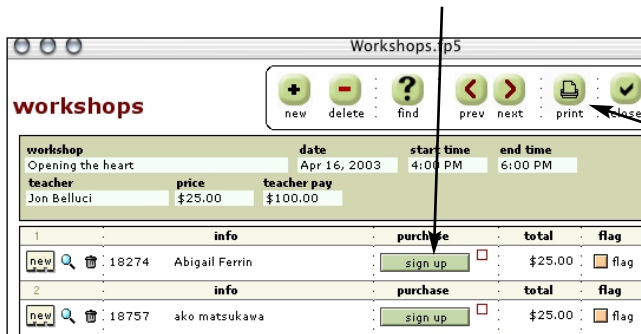


As with ALL reports, you will not see all records for the report until you actually print out the report, or go to preview mode. Go to preview mode by changing the tab from browse to preview at the bottom of the window.



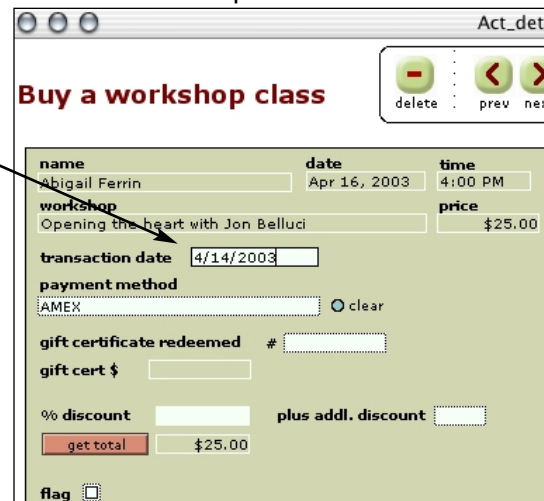
### Entering a workshop:

1. Click on 'workshops' from the switchboard. Workshops are for activities and classes that do not happen on a regular basis. Entering for workshops is similar to entering for classes. Enter the student and click on the 'sign up' button to access the workshop transaction screen.



To print out the students in this workshop, click on the print button. To view a report on transactions from workshops over multiple days, please see the 'workshop report' section below.

The workshop transaction screen works exactly like the classes except you must enter the date of transaction. This allows your books to stay balanced, since you want the money entered to go with the day of transaction, rather than the date which the workshop occurs.





## Buying a series:

1. Click on 'series' from the switchboard. You will see the 'series' file.

Click on the name field and select the name of the student. If the student is not in the list, click on the 'new' card icon to enter a new student.

Click on 'type of series' to choose which series the student wants to buy.

Select the payment method and enter the gift certificate number if necessary (the gift certificate \$ amount will automatically be entered).

Add a one-time only discount here.

Click on the clock icon to start the series. If necessary, modify the start and end dates.

Finally, click on 'get total' to finalize the transaction.

## Selling a retail product:

1. Return to the switchboard and click on the blue tab that says 'retail'. Click on 'purchase'. You will see the 'retail' file.

Click on the name field to select the student's name. The invoice number is generated automatically on the right hand side of the screen.

Click on the rectangle next to product to select from your list of products. The amount will enter automatically. Enter the quantity and the discount, if necessary. Hit the 'get total' to finalize the transaction. The totals are adjusted below.

Click 'print' to print the student a receipt.



To sell gift certificates, select gift certificate from the product list, enter in a unique serial number and then the amount the certificate is for.

When redeeming a certificate, enter this serial number of the certificate and the amount will automatically fill in.

### Reports:

**NOTE:** When producing reports, you will not see all records for the report until you actually print out the report, or go to preview mode. Go to preview mode by changing the tab from browse to preview at the bottom of the window.



Return to the switchboard and click on the red tab that says 'reports'. There are seven reports available: daily totals, series report, teacher pay, class report, student report, retail report and workshop report.

1. Daily total: The daily total is a summary of one or more days cash flow. It gives you total by payment method, including gift certificates so that your cash register is balanced at the end of the day. For reports that cover more than one day, enter ... between the starting date and the end date in your find. For example, if you want to know the totals between 7-1-2002 and 7-31-2002, enter 7-1-2002...7-31-2002 when you are prompted for the date.

class/workshop total	
total students	2 new 0
cash	\$8.00
check	\$8.00
VISA	\$8.00
MC	\$8.00
AMEX	\$8.00
other	\$8.00
comp	\$8.00
gc	\$8.00
class total	\$8.00

series total	
total series sold	1
cash	\$8.00
check	\$8.00
VISA	\$188.00
MC	\$8.00
AMEX	\$8.00
other	\$8.00
comp	\$8.00
gc	\$8.00
series total	\$188.00

retail total	
cash	\$8.00
check	\$8.00
VISA	\$8.00
MC	\$8.00
AMEX	\$8.00
other	\$8.00
comp	\$8.00
gc	\$8.00
total for retail	\$8.00

grand total	
cash	\$8.00
check	\$8.00
VISA	\$188.00
MC	\$8.00
AMEX	\$8.00
other	\$8.00
comp	\$8.00
gc	\$8.00
TOTAL	\$188.00



2. Series report: Series report tallies up all the series sold for the time period and provides a summary of all the different types of series sold.

Act\_detail.fp5

### series report

May 15, 2002

	type of series	payment	gc discount	revenue
hoho jo 8/15/02 - 9/15/02	3 month	check		\$250.00
barb greaser 5/15/02 - 6/15/02	3 month	check		\$250.00
<b>series summary</b> 3 month		<b>count</b> 2		
alano deal 8/15/02 -	4 classes	cash		\$75.00
<b>series summary</b> 4 classes		<b>count</b> 1		
panda bear 5/15/02 - 11/15/02	half year	MC		\$500.00
<b>series summary</b> half year		<b>count</b> 1		
happy macmellow 8/15/02 - 6/15/03	monthly	cash		\$130.00
devid wether 5/15/02 - 6/15/02	monthly	cash		\$130.00
moopy border 8/15/02 - 6/15/03	monthly	AMEX		\$130.00
binger lee 5/15/02 - 6/15/02	monthly	MC		\$130.00
<b>series summary</b> monthly		<b>count</b> 4		
najo jojo 8/15/02 - 6/15/03	series of 10	check		\$150.00
angle lee 5/15/02 -	series of 10	VISA		\$150.00

3. Teacher pay: Teacher pay tallies up all the info for paying the teacher, including a breakdown of classes and the number of students.

### teacher salary report

Army Zone	\$ / class	students	classes	gross pay
May 21, 2002 6:00 PM - 7:30 PM <input type="checkbox"/> cancelled <input type="checkbox"/> sub		3		
<b>total for Army Zone</b>		3	1	\$
<b>Carmen Tolivar</b>	\$ / class	students	classes	gross pay
May 21, 2002 4:30 PM - 5:30 PM <input type="checkbox"/> cancelled <input type="checkbox"/> sub		1		
<b>total for Carmen Tolivar</b>		1	1	\$
<b>Kirk Stricker</b>	\$ / class	students	classes	gross pay
May 21, 2002 12:00 PM - 1:15 PM <input type="checkbox"/> cancelled <input checked="" type="checkbox"/> sub (Aida Amirkhanian)			1	\$
<b>total for Kirk Stricker</b>			1	\$
<b>Nancy Sanderecock</b>	\$ / class	students	classes	gross pay
May 21, 2002 7:30 AM - 9:00 AM <input type="checkbox"/> cancelled <input type="checkbox"/> sub		1		
9:00 AM - 10:30 AM <input type="checkbox"/> cancelled				



4. Class report: This is a like the individual class report, just over a period of time.

Act\_detail.fp5

### class report

April 13, 2003

Joe Strummer      Level 1/2      2:00 PM - 3:30 PM  
sub

			payment	total	gc
Katherine Harouni	<input type="checkbox"/> new	-	Series		
Women's series		1 classes left			
Royale Boubbey	<input type="checkbox"/> new	-	Community	\$8.00	
			cash		
Pat Strode	<input type="checkbox"/> new	-	Series		
Community		4 classes left			
Etta Craig	<input type="checkbox"/> new	-	Series		
Community		1 classes left			
Lori Chee	<input type="checkbox"/> new	-	Community	\$8.00	
			cash		
Angie Lee	<input type="checkbox"/> new	-	Community	\$0.00	
			cash		

class total

total students  new

total revenue

transactions

cash	check	VISA	MC	AMEX	other	comp	gc
\$16.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

5. Student report: This report gives a tally of all students and their status, sorted by how many classes they have taken for the dates entered.

Act\_detail.fp5

### students report

Angie Lee	<input type="checkbox"/> new	-	# classes	<input type="text" value="2"/>
Adam Hidalgo	<input type="checkbox"/> new	-	# classes	<input type="text" value="1"/>



6. Retail report: Retail report tallies up all the retail sold for the time period.

Workshop report: This report gives a report of all workshops. The records will be sorted by transaction date. To print out a list of all students in one workshop see 'Entering a Workshop' section above.

### Closing up:

When you are done using Octo-Assist, you can go back to the switchboard and select the 'bkup' button to save a copy or 'quit' to quit Filemaker.

If you click on 'bkup' Octo-assist automatically makes a backup of your files to the folder called 'octo\_assist\_bkup'. We strongly advise saving a copy of this backup folder on an external zip or cd or other media in case of hard drive failure. The backup files have the word "copy" added to their name. When restoring from a backup, make sure to remove the word "copy" from all files and restore the original file and folder structure:

- octo\_assist
- switchboard.fp5
- octo\_assist data
- octo\_assist\_bkup