

OnlineDiscoveryPro.com

User Guide

- **www.OnlineDiscoveryPro.com** is web-based software hosted by America's Software Corporation.
- **Requirements:** This software can be accessed by any computer with internet access. Supported browsers are: Internet Explorer, Firefox, Google Chrome, Safari. There is no software to download or install. We host the application including your data and perform all backups and updates seamlessly. Onlinediscoverypro.com is a secure site. Login names/passwords are encrypted.
- **Data we have entered for you:** We have setup some login profiles initially. Admin, Timeclock, and Instructor. The time clock login opens the time clock with no other menu items visible. The Admin login has access to all menus and features and Instructor has access to all menus except setup and Admin. If you would like to change these login permissions or setup your own users please pick the menu item USER SETUP. To modify the menu access of the users please select SETUP then MENU ASSIGNMENT. We have also setup a default campus, a Program and sample services, classes and a default student profile. Please take a few minutes to view these items on the SETUP MENU before entering your student profiles: a) LIST VALUES (enrollment statuses), School Settings and Programs. Setup programs is where you enter the timeclock rules that will be used when the students clock in and out.

OnlineDiscoveryPro.com

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Setup School Settings

School Information

[Update School](#)

School Name:

Title:

Phone:

Contact:

Fax:

Address 1:

Address 2:

City:

State: Zip:

Email:

☐ Show social security numbers

Tax Rate: (Enter 0.075 for 7.5%)

License:

Fed. Tax ID:

Force Barcode: ☐ (Student Barcode / Timeclock ID needed to clock in)

Round to 1/4 Hour: ☒ (Daily hours round to .00, .25, .50 or .75)

Time Zone:

Use Server Time*: ☒

*Server time will be used for TimeClock.
Time zone adjusted server time: 6:29:44 PM

Use Webcam: ☒

Session Timeout: (Default 60 minutes)

Notes:

Register Password:

Auto Print Receipt ☒

Receipt Disclaimer:

Enter the school name and address. This info will print on report headings.

Mask SS # in Student Profile

Time Clock Settings
Use your webcam to take photos of students clocking in and out

Cash register password needed to modify POS transactions.

Logout After minutes of inactivity

Prints on your cash register receipt.

Sub Menu - IP Addresses are used to track the computer used to clock in and out. Setup valid IP addresses of the computers used for the timeclock.

Setup List Values

Setup Accounting Types, Payment Types and Enrollment Status

Please pick a type from the drop down list then add or edit an item you want to appear in the list.



Payment types are used in the cash register and enrollment statuses are used when setting up a student profile. Accounting types are used in the student accounting section of the software when recording tuition and payments.

Setup Campus

The software will keep each campus data separate. Make sure you assign your users to a campus in user setup.


School Campus Setup

Campus Name:

Notes:


Campus	Notes	Delete	Programs Offered
South Campus	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Cosmetology <input checked="" type="checkbox"/> Esthetician <input checked="" type="checkbox"/> Teacher Training-Cos <input checked="" type="checkbox"/> Teacher Training-Est
American Beauty College	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Cosmetology <input checked="" type="checkbox"/> Esthetician <input checked="" type="checkbox"/> Teacher Training-Cos <input checked="" type="checkbox"/> Teacher Training-Est


A campus that is assigned to students will not be deleted.

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VERIFIED & SECURED
VERIFY SECURITY



Enter the name of each campus and press ADD CAMPUS. Then pick the programs offered at each campus. To associate users to a specific campus go to USER SETUP menu.

Setup School Calendar

Start Date: 

End Date: 

Header:

Calendar Cell Background	Calendar Cell Text
CCFFCC  sample	CC0033  sample
























Sample Text













School Closure: ☐ Yes ☒ No

























Programs: ☐ Cosmetology ☐ Esthetician ☐ Teacher Training-Cos ☐ Teacher Training-Est




Target Users: ☐ Instructors ☐ Students

Description:

Font default  **Size** default           

Enter the date for the event or school closure in the start and end date fields. Then type a description. The description will appear on the calendar. If you are entering a school closure, enter the dates of the closure in the start and end date fields. Specify who should see the calendar entry in the **target users** section. If entering a closure, specify the programs affected by the closure.

Setup Programs - 1

Enter/Update Programs

Modify Existing Program:

Modify Selected Program
 Program Type:
 Program Name:
 Required Hours:

Program offered on these campuses:
☒ South Campus ☒ American Beauty College

Time Clock Rules Section 1. If all students in this program have the same schedule every day setup the timeclock rules here in section 1 only.

Max Daily Hours (8.5 = 8hr 30min)
 Tardy Time (hh:mm AM):
 Start Block Time (hh:mm AM):
 End Block Time (hh:mm AM):
 Early Time (hh:mm AM):
 Auto Clockout After: Hours (2.5 = 2hr 30min) Auto clockout only requires the student to clock in. The time clock will automatically clock them out at the time specified.

Time Clock Rules Section 2. If students in this program have different schedules on certain days of the week setup the timeclock rules here, in section 2 and NOT in section 1. If a student in this program has a completely different schedule then setup an individual schedule for the student under the SETUP MENU, Setup Student Schedule.

Weekday	Max Hours	Tardy Time	Block Start	Block End	Early Time	Auto Clockout
Sunday	<input type="text" value="0.000"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Monday	<input type="text" value="8.000"/>	<input type="text" value="08:15 AM"/>	<input type="text" value="08:20 AM"/>	<input type="text" value="12:00 PM"/>	<input type="text" value="08:00 AM"/>	<input type="text"/>
Tuesday	<input type="text" value="8.000"/>	<input type="text" value="08:15 AM"/>	<input type="text" value="08:20 AM"/>	<input type="text" value="12:00 PM"/>	<input type="text" value="08:00 AM"/>	<input type="text"/>

Enter the name of the program (COS AM, COS PM)

Pick the main type of program (Cosmetology, Manicure, Esthetician)

Specify the campus(s) the program is offered at.

Section 1 used when the same time clock rules apply for each day of the week.

Section 2 used when time clock rules change from day to day

Automatically clock out the student at this time.

To add a new program enter the program name and pick the program type. If the program type does not appear at the top press add/modify types to add them. Pick the campus(s) the program is offered at.

Setup Programs - 2

Hours offered is used on the SAP report.

Clock Hour levels are used to remind you when a student reaches these levels.

Breaks can be automatically deducted by the time clock.

Hours Offered

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
0.00	8.00	8.00	8.00	8.00	8.00	0.00

Clock Hour Levels

Level 1	Level 2	Level 3	Level 4
400	600	900	1200

[Update Program](#)

Break Adjustments

After hours deduct mins

[Add Break](#)

Hours	Deduct	
4	30	delete
6	60	delete

Note: If you enter deduct 15 minutes after 2 hours and the student has a total 7 hours then 45 minutes will be deducted. If two entries are entered one for deduct 15 minutes after 2 hours and another to deduct 30 minutes after 4 hours and student has a total of 7 hours then 1 hour and 15 minutes will be deducted from the total time.

[Add Type](#)

Program Type	In Use	
Cosmetology	YES	
Esthetician	YES	
Manicurist		remove

Program types are described in the previous slide.

Setup Competencies

Competencies

Program(s) Type: [\[copy comps\]](#)

☒ Cosmetology ☐ Esthetician ☐ Teacher Training-Cos ☐ Teacher Training-Est

[Add Comp](#)

Cosmetology ☐ Auto sort reports by name (N.C. State users should leave unchecked). [Update Records](#)

Task (Maximum characters: 500)	Required	Order	
<p>You have 485 characters left.</p> <p>Artificial Hair</p>	<p># Hours: 0.00</p> <p># Mannequin: 0.00</p> <p># Regular: 0.00</p> <p># Credit Hours: 0.00</p>	8	[delete]
<p>You have 480 characters left.</p> <p>Blowdry/Marcel Style</p>	<p># Hours: 0.00</p> <p># Mannequin: 0.00</p> <p># Regular: 0.00</p> <p># Credit Hours: 0.00</p>	5	[delete]
<p>You have 475 characters left.</p> <p>Blowdry/Marcel with Brush</p>	<p># Hours: 0.00</p> <p># Mannequin: 0.00</p> <p># Regular: 0.00</p> <p># Credit Hours: 0.00</p>	6	[delete]
<p>You have 470 characters left.</p> <p>Chemical Reform Permanent Wave</p>	<p># Hours: 0.00</p> <p># Mannequin: 15.00</p> <p># Regular: 20.00</p>	10	[delete]

You must setup programs before you setup competencies. Pick the program the competency is associated with then enter the name of the competency and pick ADD COMP. To modify existing competencies simply pick the program whose competencies you wish to modify, make your changes then pick UPDATE RECORDS

Setup Theory Grading

Theory Grade Types

Type:

[Add Type](#)

Type	Weight	
Chapter Test	0	[delete]
Chapter Test	0.25	[delete]
Final	0	[delete]
Final	0.25	[delete]
Home Work	0	[delete]
Homework	0.25	[delete]
Practical	0.25	[delete]
Quiz	0	[delete]

[Update Types](#) Weight Total: 1

[Add Class](#)

Program: Cosmetology

Copy	Class		
<input type="checkbox"/>	Esthetics	delete	assignments
<input type="checkbox"/>	Freshman	delete	assignments
<input type="checkbox"/>	Juniors	delete	assignments
<input type="checkbox"/>	Practical	delete	assignments
<input type="checkbox"/>	Seniors	delete	assignments
<input type="checkbox"/>	Sophomores	delete	assignments
<input type="checkbox"/>	Teachers	delete	assignments
<input type="checkbox"/>	Theory	delete	assignments

Copy To: [Copy Class](#)

[Update Classes](#)

Class: Esthetics

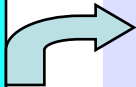
Theory Type	Assignment	Sort Order	Note	
Final	Final			[delete]
Chapter Test	Chapter Test			[delete]
Chapter Test	Chapter Test			[delete]
Homework	Homework			[delete]
Final	Final			[delete]
Practical	Practical			[delete]

[Update Requirements](#)

Setup theory grade types first (chapter test, final, homework) then setup classes (Milady) then assignments (Chapter 1, Chapter 2 etc. Each program can have it's own list of classes.

Setup Student Schedule

Pick the program then pick one or more students you wish to create a time clock schedule for.



Student Schedule

Only students with a campus assigned will be displayed.

Program:

Campus:

Student	Days	Dates and Times
<input type="checkbox"/> Adams, Paige Ellen view	<input type="checkbox"/> Sunday	Date Start: <input type="text"/> <input type="text"/> Date End: <input type="text"/> <input type="text"/> Early Before: <input type="text"/> Tardy After: <input type="text"/> *Start Time: <input type="text"/> *End Time: <input type="text"/> <small>*Start and End time required for appointments.</small>
<input type="checkbox"/> Airo, 805 Amanda Mae view	<input checked="" type="checkbox"/> Monday	Block Time Start: <input type="text"/> End Block Time: <input type="text"/> Max Hours: <input type="text"/> (Enter 8.5 for 8 hrs 30 mins)
<input type="checkbox"/> Ali, Maryam Sharif	<input checked="" type="checkbox"/> Tuesday	Add Schedule
<input type="checkbox"/> Allen, 868 Emily view	<input checked="" type="checkbox"/> Wednesday	Delete Selected
<input type="checkbox"/> Allred-Clapp, Shamekia Nicole	<input checked="" type="checkbox"/> Thursday	
<input type="checkbox"/> Alston, Chasity Nicole view	<input checked="" type="checkbox"/> Friday	
<input type="checkbox"/> Aminu, 938 Aminat view	<input type="checkbox"/> Saturday	
<input type="checkbox"/> Abimbola		
<input type="checkbox"/> Anderson, 817 Natasia Levette		
<input type="checkbox"/> Andersson, Dawn Gale view		
<input type="checkbox"/> Arruda, Catherine M. view		
<input type="checkbox"/> Asbury, Brooke Cottrell		
<input type="checkbox"/> Bacelli, 975 Lauren Michelle		
<input type="checkbox"/> Baker, Autumn Nicole		
<input type="checkbox"/> Barnette, Kasey R.		
<input type="checkbox"/> Bassett, 911 Meghan Sue		
<input type="checkbox"/> Beckwith, Ashley Nicole		
<input type="checkbox"/> Bennett, Jessica R.		
<input type="checkbox"/> Billie, 951 Candace Diara		
<input type="checkbox"/> Blackburn, 979 Amy Annette		

Campus: South Campus

Student	Start	End	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
view Adams, Paige E	01/01/2012	03/01/2012	-	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	-
view Airo, 805 Amanda M	01/01/2012	12/30/2012	-	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	-
view Allen, 868 Emily C	01/01/2012	12/30/2012	-	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	Tardy: 08:15 AM Max Hrs: 8.00	-

Only setup an individual student time clock schedule if the student has a schedule that is different from the other student's schedules in the program. If all students have the same schedule then setup the time clock rules under SETUP PROGRAM instead.

Setup Salon Services

Pick the program then enter the name of the service. Associate the service with a state board competency and enter the price.

Enter the duration of the service for the appointment scheduler and the color you want it to appear.

Client Services

Types

☒ Cosmetology ☐ Esthetician ☐ Manicurist ☐ Teacher Training-Cos ☐ Teacher Training-Est


Add New Service:

Modify Existing Service:

Competency:

Price: Taxable: ☐

Estimated Duration: (1.5 = 1hr 30 min)

Appointment Color:  Service Updated. Client Service: ☒

Salon/Client services are used by the cash register and the scheduler.

Setup Menu Assignment

Main Menu items appear across the top of the software when you login.

Manual Time Entry

Manage Menu Items

Main Menu Name: Setup

Visible to: ☐ Student ☒ Instructor ☒ Admin

☐ Time Clock ☐ Specialist I ☐ Specialist II

Sort Order: 1

[Update Menu Item](#)

These are sub-menu items and they appear when you click on a main menu item.

School Settings	<input type="checkbox"/> Student <input checked="" type="checkbox"/> Instructor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II	Read only to:	Sort Order 10
	<input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II		
School Campus	<input type="checkbox"/> Student <input checked="" type="checkbox"/> Instructor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II	Read only to:	Sort Order 20
	<input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II		
School Calendar	<input type="checkbox"/> Student <input checked="" type="checkbox"/> Instructor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II	Read only to:	Sort Order 20
	<input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II		
Programs	<input type="checkbox"/> Student <input checked="" type="checkbox"/> Instructor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II	Read only to:	Sort Order 30
	<input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II		
Clinical Competencies	<input type="checkbox"/> Student <input checked="" type="checkbox"/> Instructor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II	Read only to:	Sort Order 50
	<input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II		
Theory Types	<input type="checkbox"/> Student <input checked="" type="checkbox"/> Instructor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II	Read only to:	Sort Order 55
	<input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II		

Indicate which menu items are visible to each type of user. You can also specify read-only if you wish the user to be able to view but not make changes. Enter a sort order to specify the order in which the items should appear on the menu.

Setup Menus for Student Login

Main Menu: My Links Visible to: <input checked="" type="checkbox"/> Student <input type="checkbox"/> Instructor <input checked="" type="checkbox"/> Admin <input type="checkbox"/> Time Clock <input type="checkbox"/> Specialist I <input type="checkbox"/> Specialist II <input type="checkbox"/> Specialist III <input type="checkbox"/> Specialist IV <input type="checkbox"/> Specialist V Sort Order: <input type="text" value="32"/>	My Transcript <input checked="" type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin Read only to: <input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin
	Timeclock Detail <input type="checkbox"/> Student <input type="checkbox"/> Instructor <input checked="" type="checkbox"/> Admin Read only to: <input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin
	My Timeclock Detail <input checked="" type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin Read only to: <input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin
	My SAP Report <input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin Read only to: <input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin
	View School Document <input type="checkbox"/> Student <input type="checkbox"/> Instructor <input checked="" type="checkbox"/> Admin Read only to: <input type="checkbox"/> Student <input type="checkbox"/> Instructor <input type="checkbox"/> Admin

These menu items apply to students only: **My Transcript**, **MY SAP report**, **MY Timeclock Detail** and **View School Documents**. Students will be able to view a report of their own data. They cannot enter or change any information.

Student LOGIN setup – Give the student a login name and password in their student profile (upper right section of general profile tab).

User Setup

There are 5 types of users. To create a new user specify the type then type in the first and last name of the user. Then enter the user name (email) and password the user will use to login. FYI: You do not have to use an email address .

If the user is a cash register user specify the shift. You must specify the campus and the programs the user is associated with. Users can only see students from that campus and the programs selected.

Admin and Instructor Setup/Modify

Select User Type: ☒ Admin ☐ Instructor ☐ Time Clock ☐ Specialist I ☐ Specialist II

Select User:

Change User Type to: ☐ Admin ☐ Instructor ☐ Time Clock ☐ Specialist I ☐ Specialist II

First Name:

Middle Name:

Last Name:

Email:

Password:

Active: ☒ Yes ☐ No

Shift:

Reminders: ☐ Yes ☒ No

Assign Campus: ☒ South Campus ☒ American Beauty College

☒ Cosmetology

☒ Esthetician

Assign Program: ☒ Teacher Training-Cos

☒ Teacher Training-Est

To specify the menus you wish the user to be able to view, go to setup menu assignment. Please do not delete the Admin login we created. It is not necessary to assign any menus to the Time Clock user type. When you login as this user the software automatically opens the time clock.

Student List

Student List

☐ All Students
 ☒ Current
 ☐ Graduated
 ☐ Withdrawn

...: [add new student](#) :...

Display Students at a time.

...
 ame appears in **red**, the student is within 30 days of his/her scheduled graduation date.

	<u>Program</u>	<u>Last Name</u>	<u>Middle Name</u>	<u>First Name</u>	<u>Student ID</u>	<u>Timeclock ID</u>	<u>Email</u> <input type="button" value="Copy All Emails"/>	<u>Entry Date</u>	<u>Withdrawal Date</u>	<u>Scheduled Grad Date</u>	<u>Grad Date</u>	<u>Status</u>	<u>Current</u>	<u>Hours TD</u>	<u>Hours This Month</u>
select	COS Evening	Anderson	Michael	Todd	6789	6789	toddanderson@aol.com	7/1/2013		12/1/2014		Current	<input checked="" type="checkbox"/>	165.75	105.00
select	Cosmetology	Bolton	James	Michael	v1019	v1019	jamesbolton@aol.com	2/2/2013				Current	<input checked="" type="checkbox"/>	134.00	105.00
select	Cosmetology	Hontas	Jane	Poco	667788	667788	pocohontas@windstream.net	7/1/2013				First Year	<input checked="" type="checkbox"/>	114.00	105.00
select	Cosmetology	Wilhelm	Mitchell	Jeffrey	111122	112	jeff@cos	1/1/2011				Current	<input checked="" type="checkbox"/>	125.25	105.00
select	Esthetician	Doe		Jane	123123	123123	janedoe	10/1/2010		10/10/2011		Current	<input checked="" type="checkbox"/>	738.00	10.00
select	Esthetician	White		Walter	33441	9876543210	walterwhite@att.net	5/1/2013				First Year	<input checked="" type="checkbox"/>	121.50	105.00
select	Nail Tech	Michaels	Lee	Cindy	99009	9088990	poboy@aol.com	6/1/2013				Current	<input checked="" type="checkbox"/>	105.00	105.00

Students appear in a list format for easy viewing. To view additional student Details pick SELECT on the left. The student list can be sorted by clicking on any of The underlined column headings or by using the filter at the top of the form. To add A new student pick ADD NEW STUDENT at the top. Students appearing in **RED** are within 30 days of their graduation date.

Student Profile

Click on the dark blue tabs across the top of the student profile to access additional student information. Required fields are shown in red. The last date of attendance and Hrs to Date fields are read only.

Students are considered "active" if the CURRENT STUDENT check box is checked. If you enter a withdrawal date or graduation date the student is considered inactive.

Student Profile Data

Select Student: or Student ID:

[\[return to student list\]](#)

Personal Info | Financial Info | Previous Education | Emergency Info | Student Notes | Placement Info | Misc Info

Fields highlighted in RED are required.

Student ID: 7070	Program: Esthetician
First Name: Jane	Campus: Cherry St Campus
Middle Name:	Birthdate:
Last Name: Doe	Marital Status: Single
Address 1: 102 Park Avenue	Home Phone: (704) 662-8428
Address 2:	Cell Phone:
City: Charlotte	Current Student: <input checked="" type="checkbox"/>
State: North Carolina	Enrollment Time: <input checked="" type="radio"/> Full <input type="radio"/> Half
Zip: 28117	Schedule Appts: <input type="checkbox"/>
County: Iredell	Status: Current
Email Address: janedoe	Scheduled Grad Date: 10/10/2011
Login Password:	Hrs to Date: 1606.25
Gender: Female	Graduation Date:
Program Hrs: 0	Withdraw Date:
Entry Date: 10/1/2010	SSN: - - Invalid SSN
Last Attendance: 04/02/2012	Student Barcode: 123123
Withdraw Date:	Withdraw Reason:

If you do not wish for SSN field to appear in the student profile you can remove it under SETUP SHOOOL INFO.

Manual Attendance

Enter/Update Attendance

Add New Records: 1. Pick 1 or More Students below then go to step 2.

Pick Program:

☐ Check All

- ☐ Blow, Joe
- ☐ Bolton, Michael
- ☐ Doe, Jane
- ☐ Hontas, Poco
- ☐ Technician, Nail
- ☐ White, Walter
- ☐ Wilhelm, Jeffrey Mitchell

Add New Records. 2. Enter data for selected students from list on left

Date	Clock In	Clock Out	Hours	Notes
9/26/2012				

Notes: Clock in and Clock Out Fields Not Mandatory, FT = Field Trip

Modify Existing Records. 1. Pick a student and a date range below

Start Date	End Date	Program	Student
01/01/2012	9/26/2012	Cosmetology	--Select--

<< First
< Prev
1
2
3
4
5
Next >
Last >>

[Update Records](#)

Modify Existing Records 2. Make changes then press **UPDATE**

Icon Legend: ☀=Early ⚠=Tardy 🚗=Field Trip

Student: Bolton, Michael **ID:** v1019 **Hrs:** 13.50 **Program:** Cosmetology

[View March](#)
April
[View May](#)

Clock Date: 04/10/2012

IN	OUT	Hours	Clock In	Clock Out	Notes	☀	⚠	Manual	User	🗑	Delete
		4.00	08:00 AM	12:00 PM		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	I: O'Crivwell, Todd G O: O'Crivwell, Todd G	<input type="checkbox"/>	<input type="checkbox"/>

Total Hours: 4.00 ☐ Delete Entire Day ☐ Breaks Deducted

Clock Date: 04/08/2012

IN	OUT	Hours	Clock In	Clock Out	Notes	☀	⚠	Manual	User	🗑	Delete
		1.00	08:00 AM	09:00 AM		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	I: O'Crivwell, Todd G O: O'Crivwell, Todd G	<input type="checkbox"/>	<input type="checkbox"/>

Total Hours: 1.00 ☐ Delete Entire Day ☐ Breaks Deducted

Please refer to the numbered instructions on the page. When adding New records you can pick one of more students on the left. If you wish To modify a record you must enter a date range and pick the student in The modify existing record section. If you are using the web-cam feature an icon of a camera will appear in the IN and OUT fields on the left of the attendance record in section 2. Click on the icon to view the picture of the person who clocked in our out. If you saved a picture of the student in their profile it will show you that photo also for visual comparison to minimize buddy punching.

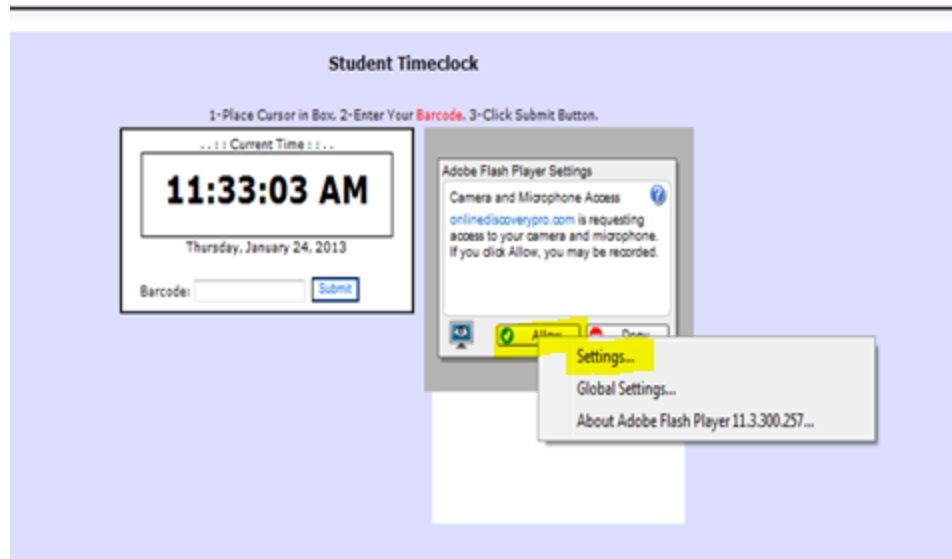
Student Time Clock

The screenshot displays the 'Student Timeclock' web interface. At the top, it provides instructions: '1-Place Cursor in Box. 2-Enter Your Barcode. 3-Click Submit Button.' Below this is a large digital clock showing '1:46:00 PM' and the date 'Saturday, September 28, 2013'. A 'Barcode:' input field and a 'Submit' button are present. A yellow message bar indicates the 'Last Action: Clock-Out at 9/28/2013 1:44 PM'. At the bottom, a table lists student information for Todd Michael Anderson.

Student Timeclock	
1-Place Cursor in Box. 2-Enter Your Barcode. 3-Click Submit Button.	
... : Current Time : ...	
1:46:00 PM	
Saturday, September 28, 2013	
Barcode:	<input type="text"/> <input type="button" value="Submit"/>
Last Action: Clock-Out at 9/28/2013 1:44 PM	
Student Name:	Anderson, Todd Michael
Current Status:	Clock-Out
Hours Today:	105.00
Hours to Date:	165.75
Current Time:	9/28/2013 1:44 PM

Before using the timeclock make sure you have setup your timeclock rules Rules under **SETUP PROGRAMS**. Scan the student barcode or enter the student's barcode ID number. If using a scanner the student will not need to press SUBMIT. The scanner will send the enter command. The student's name, hours to date and timeclock action (clock in or clock out) will appear on the screen for 5 seconds for privacy then disappear. If allowed, students can view their timeclock details by giving the student login access to the software. Your software comes with a built-in timeclock login that will open the timeclock only with no menu items.

Using the Web-Cam Feature



If you have activated the web-cam feature in **Setup School Settings** you must have a web-cam installed on the timeclock computer. The software activates your web-cam whenever the student clocks in or out and saves a photo image in their attendance record for comparisons to the photo you saved in the student profile to minimize buddy-punching. The first time you use the web-cam feature you will be prompted by **Adobe Flash Player**. Right click on **ALLOW** and pick **SETTINGS**. Then from settings pick **ALLOW** and **REMEMBER** so it doesn't prompt you on every clockin/clockout.

Setup System Messages

System Messages

Brief Header:

Live Date:

Expires After:

Visible To: ☐ Admins ☐ Instructors ☐ Students

[Save Changes](#) [Clear Form](#)

Description:

Message History









	Header	Go Live	Expires	
[select/edit]	Time Clock	3/27/2012	3/28/2012	[delete]

If you wish your users to see a message when they logon to the software, set the message up here. Specify the date to start displaying the message and the date to stop. Also indicate who the message should be seen by, admins, instructors and/or students.

Upload Documents

Manage Folders

9 of 20 folders defined.

Delete	Description	
	Admin Student Forms	[Rename]
	Admissions	[Rename]
	Certificates for Graduatio	[Rename]
	default	[Rename]
	Financial Aid	[Rename]
	Front desk	[Rename]
	Graduation Packet	[Rename]
	Student Forms	[Rename]

Manage Documents

Select a folder:

Select PDF to Upload:

Document Name:

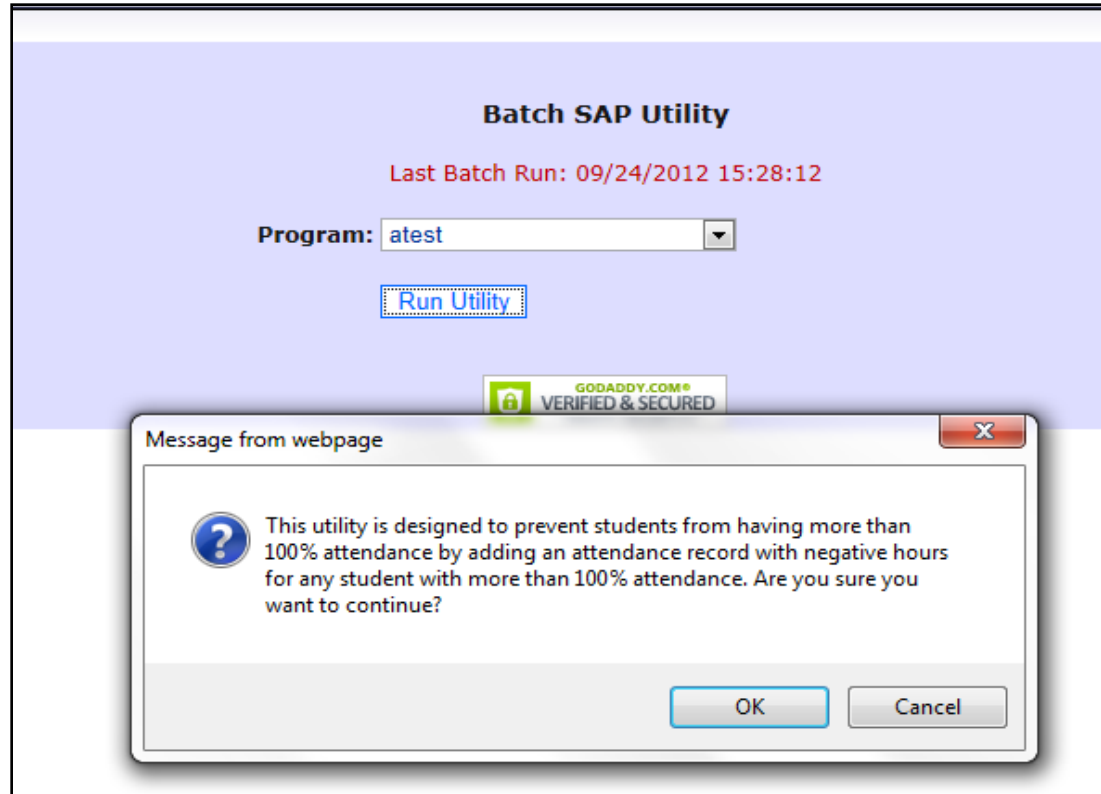
Select a Document Folder:

Visible To: ☐ Instructor ☐ Student

GODADDY.COM®
VIRIPIPTN & SFTI RFTN






If you have documents you want to make available to users, use the Manage document utility. You can create and name up to 20 folders. Browse on your computer to pick the document and then indicate which folder You want to store it in. Last, specify if instructors and/or students should be able To view the documents. FYI: Only pdf documents can be uploaded.

Batch SAP Utility



Running this utility will cause an attendance record to be added to any Student who has more than 100% attendance in an attempt to lower The attendance to 100%. Please use caution when using this utility. It cannot be reversed.

Theory Grades

Previous Grades.					
<u>Student</u>	<u>Class</u>	<u>Theory Type</u>	<u>Assignment</u>	<u>Grade Date</u>	<u>Grade</u>
Doe, Jane M	Milady	Chapter Test	Chapter 6	11/7/2011 	87.00
Doe, Jane M	COS 1101	Chapter Test	Test 1	8/28/2011 	70.00
Doe, Jane M	COS 1101	Chapter Test	Test 1	8/28/2011 	65.00
Doe, Jane M	COS 1101	Chapter Test	Test 1	8/24/2011 	70.00
Doe, Jane M	Milady	Chapter Test	Chapter 4	8/21/2011 	90.00
Update Grades					

Before using theory grades you must setup your class names, assignments and grade types under the SETUP menu.


Create your own Report


User Defined Student Data Report


Instructions: * Click on Column Header to sort the column in ascending or descending order.
* Select the Column Checkbox to include the column in the report.
* The report can show up to 15 Columns only.

Student Status: ▼

-OR-

Start Date: 

End Date: 

Date Filter: ▼ 




<u>Program</u>	<u>Campus</u>	<u>Student ID</u>	<u>First Name</u>	<u>Middle Name</u>	<u>Last Name</u>	<u>Gender</u>	<u>Birth Date</u>	<u>Marital Status</u>	<u>Address 1</u>	<u>Address 2</u>	<u>City</u>	<u>State</u>	<u>Zip Code</u>	<u>County</u>	<u>Home Phone</u>	<u>Cell Phone</u>	<u>Email Address</u>	<u>Program Hrs</u>	<u>Hrs To Date</u>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	South								1135 M.										

Select the type of report you would like and then select the fields you wish To appear on the report by clicking the check boxes under each column.

Reports – Attendance Summary

Attendance Summary Report								
08/01/2013 - 08/31/2013								
Program: Cosmetology								
	Student ID	Hours This Period	Hours This Period (Hrs:Min)	Hours Previous Period	Hours To Date	Status	Tardy	Field Trip Hours
er, Taylor	1289			0.00	155.50	Enrolled		
ina	1204	170.25	170:15	117.25	415.75	Enrolled		
Casey	1298			0.00	155.25	Enrolled		
e, Michelle	1278			0.00	154.50	Enrolled		
, April	1283			0.00	151.00	Enrolled		
Abigail	1246	144.25	144:15	133.75	428.00	Enrolled		
mber	1243			0.00	156.00	Enrolled		
Olivia	1281			0.00	147.25	Enrolled		
lecka	1133	115.50	115:30	765.50	991.50	Enrolled	2	
Megan	1092	114.25	114:15	1,222.25	1,407.75	Enrolled	1	
andace	1149	112.25	112:15	987.00	1,206.50	Enrolled	3	
Danielle	1194	153.50	153:30	726.75	1,028.25	Enrolled	1	
ctoria	1237	175.75	175:45	123.00	441.00	Enrolled		
Molly	1177	137.00	137:00	842.25	1,492.00	Enrolled	2	
Alisha	1114	71.25	71:15	1,304.75	1,434.75	Enrolled	3	
ristin	1248			0.00	151.25	Enrolled		
Mary	1258			0.00	144.00	Enrolled		
ara	1275			0.00	142.75	Enrolled		
Heather	1168	151.50	151:30	833.00	1,124.25	Enrolled		4.25
Carson	1188	134.50	134:30	514.50	798.00	Enrolled	8	
ts, Lauren	1196	143.25	143:15	554.75	832.50	Enrolled	3	
Heather	1141	180.00	180:00	1,137.25	1,452.50	Enrolled	1	3.00
e, Ariel	1252				70.00	LOA		
Morgan	1153	142.50	142:30	1,195.00	1,466.75	Enrolled	2	
Ashanti	1220	184.00	184:00	469.50	805.50	Enrolled	4	6.00
on, Megan	1137	155.50	155:30	891.25	1,188.00	Enrolled	3	3.75
onah	1212	161.50	161:30	443.00	744.00	Enrolled		

Reports – Attendance Detail

Student Attendance Detail Report						
Selected Student Date Range From: 08/01/2012 to 09/30/2013						
Program: COS PT	Hours	Clock In	Clock Out			 Manual
Student Name: Crystal						
9/28/2013	Net Hours:	4.75				X
IP in/out: 173.188.219.038 / 173.188.219.038	4.75	09:30 AM	02:12 PM			X
9/27/2013	Net Hours:	6.00				
IP in/out: 173.188.219.038 / 173.188.219.038	5.25	08:30 AM	01:44 PM			X
IP in/out: 173.188.219.038 / 173.188.219.038	0.75	01:45 PM	03:12 PM			
9/26/2013	Net Hours:	8.00				
IP in/out: 173.188.219.038 / 173.188.219.038	8.00	11:30 AM	08:00 PM			X
9/25/2013	Net Hours:	6.00				
IP in/out: 173.188.219.038 / 173.188.219.038	6.00	08:30 AM	04:04 PM			X

Product Inventory

Product Inventory

Find Products

Supplier: --Select--
UPC Code:
Campus: Salt Lake City

Manufacturer: --Select--
Product Name:

Product Type
☐ Professional ☐ Retail ☒ Both

Product Status
☒ Active ☐ Inactive ☐ Both

[+Add New Product+](#)

Legend: Product is at or below reorder level Product was discontinued or deleted

Delete	Product Name	Supplier	Supplier Phone	Manufacturer	Manufacturer Phone	Category	Retail Price	Cost	In Stock	On Order	Reorder Level	Product Type	UPC Code	
	I Got a Date To Knight	The Industry Source	(800) 362-6245	The Industry Source		OPI Nail Lacquer	\$0.00	\$0.00	4	0	2	Prof	0948631	barcodes
	(Orem) Essential - C Cleanser	Murad	(303) 868-7958	Murad	(303) 868-7958	Cleanser	\$0.00	\$0.00	0	0	0	Prof	767332700861	barcodes
	044600015781	Costco		COSTCO		Sanitation	\$0.00	\$0.00	4	0	2	Prof	044600015781	barcodes
	096619503292	Costco		COSTCO		Sanitation	\$0.00	\$0.00	1	0	2	Prof	096619503292	barcodes
	A Good Mandarin Is Hard To Find	The Industry Source	(800) 362-6245	The Industry Source		OPI Nail Lacquer	\$0.00	\$0.00	1	0	2	Prof	09410811	barcodes
	A Rose At Dawn Broke By Noon	The Industry Source	(800) 362-6245	The Industry Source		OPI Nail Lacquer	\$0.00	\$0.00	4	0	2	Prof	0943061	barcodes
	Age-Diffusing Serum	Murad	(303) 868-7958	Murad	(303) 868-7958	Serum	\$72.00	\$28.80	5	0	1	Prof	767332700977	barcodes
	AHA Active Exfoliator	GlymedPlus	(801) 836-8192	Glymed	(801) 798-0390	Peels	\$0.00	\$23.47	4	0	2	Prof	870904003014	barcodes
	AHA Rapid Exfoliator Regular Strength	Murad	(303) 868-7958	Murad	(303) 868-7958	Exfoliator	\$110.00	\$44.00	5	0	2	Prof	767332396132	barcodes

Products at or below their reorder level appear in orange. Click on a product name to view product details. Click ADD NEW PRODUCT to add a new product. To sort the product list click on any product column heading.

Add a New Product

To add a new product, pick PRODUCTS from the Inventory menu. Then pick the supplier, the category and the manufacturer of the product. (If you have not set these up yet, do so from the INVENTORY menu item. Next, enter the name of the product and the UPC code from the product's barcode. Last, enter the retail price and/or cost and indicate the reorder level and units in stock. Press ADD PRODUCT.

[+Add New](#)

Source

Supplier: Aveda (no contact)

Category: Personal Blends

Manufacturer: Aveda ()

Product

Name: Green Tea Shampoo

Qty per Unit: 0

UPC Code: 18790-084341

Product Type: ☒ Professional ☐ Retail

Discontinued: ☐

Last Sold Date: Total Sales:

Pricing

Retail Price: 12.95

Unit Cost: 0.00

Taxable: ☐

Stock

Last Inventory Date:

Units in Stock: 24

Units on Order: 0

Reorder Level: 12

[Add Product](#) [Delete Product](#) [<< Back To Product List](#)

Reports-Licensure Rates

Annual Completion, Placement and Licensure Survey								
Date Range: 01/01/2012 to 09/28/2013								
Program	Sched to Graduate	Graduated	Completion Rate	Grads Placed	Placement Rate	Exam		Licensure Rate
						Taken	Passed	
Esthetician	72	66	91.67%	13	19.70%	22	21	95.45%
	Graduated	Exam	Related Field	Employer				Placed

In order for this data to print you must have entered graduation dates, withdrawal dates, entry dates and information about exam and placement dates in the student profile.

Reports - Transcript

		Active:	Yes	Total Hours: 151.00	
		Full Time:	Yes		
Theory GPA:	90	Course:	Cosmetology	Entry Date:	
Performance GPA:	88	Course Hrs:	1,500	Drop Date:	
Combined GPA:	89	Total Hrs:	151.00	ReEnroll Date:	
		Transfer Hrs:	0.00	Grad Date:	
		Hrs Remaining:	1,349.00	Loan Ent Date:	
				LOA Start Date:	
				LOA End Date:	
THEORY					
Class	Assignment	Grade	Date	Type	Note
Freshman	Anatomy	100	09/12/2013	Chapter Test	
Freshman	Chapter 11	78	09/26/2013	Chapter Test	
Freshman	Chapter 4	90	09/12/2013	Chapter Test	
Freshman	Chapter 5	83	09/26/2013	Chapter Test	
Freshman	Chapters 1.2.3	100	09/12/2013	Chapter Test	
Freshman	Chemistry 1	90	09/26/2013	Chapter Test	
Freshman	Draping	95	09/26/2013	Chapter Test	
Freshman	Rules & Regs Test	100	09/12/2013	Chapter Test	
Freshman	Salon Business	75	09/26/2013	Chapter Test	
Theory GPA:		90			
CLINICAL					
Description	Grade	Total	Req	Rem	Hours
Hair Styling-sets,blow dry thermal press/flat iron,art	75	0	100	100	0.00

SAP Individual Report

Satisfactory Progress Report		
Student Name:	Hannan	Date:
Program:	Cosmetology	
Instructor:		
Start Date:	05/07/2013	Evaluation Period:
Scheduled Hours:	832.00	
Actual Hours:	744.00	
Attendance %:	89.42	
Projected Date to Complete:	02/10/2014	
Theory GPA:	95	
Practical GPA:	97	
Cumulative GPA:	96	
Student is making satisfactory progress: <input type="checkbox"/> Yes <input type="checkbox"/> No		

SAP Report Setup

School Closings

Start Date: 11/28/2013
End Date: 11/28/2013
Header: Thanksgiving Holiday

Calendar Cell Background: CCFFCC sample
Calendar Cell Text: CC0033 sample

School Closure: ☒ Yes ☐ No

Programs: ☒ COS Evening ☒ Cosmetology ☒ Cosmetology PM ☒ Esthetician ☒ Nail Tech

Target Users: ☒ Instructors ☒ Students

Description:

Hours Offered						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
0.00	8.00	8.00	5.00	8.00	8.00	0.00

The satisfactory progress report calculates the student's attendance % based on the following information:

1. The student's date of entry in the student profile.
2. The hours offered each day of the week for the program the student is in. (SETUP PROGRAMS)
3. School Closures. You should set these up in the SCHOOL CALENDAR. See screen shot above. If you are adding a closure to the calendar make sure you pick YES for School Closure and indicate the programs the closure affects. These dates will not be counted as absences when calculating the Attendance %.
4. Leave of absences and previous programs. Make sure you enter these dates in the student's profile using the PREVIOUS EDUCATION tab.

SAP Summary Report

Satisfactory Progress Report									
Student		Program	Entry Date	Scheduled Comp Date	Hours Offered	Hours Accum	Attendance Percentage	Projected Comp Date	
Taylor M	9396	Cosmetology	09/03/2013	07/03/2014	160.00	155.50	97.19	06/09/2014	
Anna Dawn	9020	Cosmetology	07/09/2013	05/09/2014	480.00	415.75	86.61	04/14/2014	
Kelly A	0527	Cosmetology	11/05/2013	09/05/2014	0.00		0.00	08/11/2014	
Casey M	1904	Cosmetology	09/03/2013	07/03/2014	160.00	155.25	97.03	06/09/2014	
Michelle B	2797	Cosmetology	09/03/2013	07/03/2014	160.00	154.50	96.56	06/09/2014	
April M	1615	Cosmetology	09/03/2013	07/03/2014	160.00	151.00	94.38	06/09/2014	
Abigail L	5813	Cosmetology	07/09/2013	05/09/2013	480.00	428.00	89.17	04/14/2014	

Track student progress including Offered Hours and Attendance Percentages.

Reports - Clinical

Student Competency Report							Report Date:	09/28/2013
01/01/2013 To 08/31/2013								
Cates, J								
Live			Mannequin					
Competency	Required	Completed	Remaining	Required	Completed	Remaining	Hours	Avg Grade
Scalp/Hair Treatments	10	4	6	0	0	0	0.00	
Fullhead Fingerwave/Style	0	0	0	5	5	0	0.00	
Fullhead Pincurl/Style	0	0	0	5	0	5	0.00	100.00
Hair Styling-sets,blow dry thermal	100	13	87	70	52	18	0.00	60.31
Haircuts	75	19	56	10	7	3	0.00	83.33
Chemical Reformation or	10	1	9	25	12	13	0.00	96.25
Temporary Color	2	0	2	0	0	0	0.00	
Color	30	5	25	10	11	0	0.00	100.00
Multidimensional color,low/high	15	3	12	10	3	7	0.00	49.00
Lash Brow Tinting	2	0	2	0	0	0	0.00	
Nail Care-manicures and	15	5	10	0	0	0	0.00	50.00
Artificial Nails	5	0	5	5	0	5	0.00	
Facials with masssage/makeup	10	0	10	0	0	0	0.00	
Hair removal	5	1	4	0	0	0	0.00	

Upload School Documents

Manage Folders












5 of 20 folders defined.

Delete	Description	
	Curriculum Documents	[Rename]
	Enrollment Application	[Rename]
	Financial Aid Documents	[Rename]
	Graduation Documents	[Rename]
		[Rename]

Add New Folder (Max. 20):

[Add New Folder](#)

Track Student Accounting

Transaction History								
	Date	Type	Pay Type	Payment For	Amount	Notes	1098-T	Delete
[edit]	11/6/2013	Charge		Supplies	\$400.00		<input checked="" type="checkbox"/>	
[edit]	9/28/2013	Payment	Cash	Tuition	(\$1,750.00)		<input checked="" type="checkbox"/>	
[edit]	9/28/2013	Payment	Check	Pell Grant	(\$500.00)		<input type="checkbox"/>	
[edit]	11/13/2012	Payment	Scholarship	Pell Grant	(\$900.00)		<input type="checkbox"/>	
[edit]	11/13/2011	Charge		Tuition	\$5,000.00		<input checked="" type="checkbox"/>	
[edit]	11/13/2011	Charge		Tuition	\$200.02		<input checked="" type="checkbox"/>	
[edit]	11/13/2011	Payment	Scholarship	Tuition	(\$300.00)		<input checked="" type="checkbox"/>	
[edit]	11/7/2011	Payment	Scholarship	Pell Grant	(\$500.00)		<input type="checkbox"/>	
[edit]	11/6/2011	Payment	Scholarship	Tuition	(\$1,400.00)		<input checked="" type="checkbox"/>	
[edit]	10/30/2011	Charge		Tuition	\$500.00		<input checked="" type="checkbox"/>	
[edit]	10/30/2011	Payment	Scholarship	Tuition	(\$250.00)		<input checked="" type="checkbox"/>	

Payment Type	Amount
Charge	\$6,100.02
Payment	(\$5,600.00)
Balance	\$500.02

Reports – Student Financial

Accounts Receivable Report						Schools/1/13/2014	
Transactions between: 01/06/2008 and 09/28/2013						Printed: 9/28/2013	
Student Name	ID Number	Status	Total Charges	Total Payments	Total Refund	Balance Due	Last Payment
AAA, 132 Beauty	132	Active Student	6,700.00	-4,245.00	0.00	2,455.00	11/01/2008
Abee,	525	Senior	6,700.00	-6,700.00	0.00	0.00	10/01/2009
Ackelsc	18	Sophomore	1,334.00	0.00	0.00	1,334.00	
Adams,	575	Senior	7,400.00	-10,050.00	-2,750.00	-5,400.00	03/16/2011
Adams,	577	Sophomore	7,300.00	-800.00	-5,200.00	1,300.00	09/27/2011
Adam,	100	Senior	7,325.00	-7,325.00	0.00	0.00	01/02/2013
Adkins,	474	Senior	6,706.67	-6,706.67	0.00	0.00	11/03/2009
Airo,	805	Senior	3,900.00	-3,900.00	0.00	0.00	01/12/2012
Aladwan,	171	Senior	3,465.00	-3,424.00	0.00	41.00	05/17/2010
Alcantara,	287	Senior	6,700.00	-6,700.00	0.00	0.00	11/28/2009
Ali,	597	Senior	6,600.00	-6,600.00	0.00	0.00	06/13/2011
Allen,	353	Sophomore	3,420.53	-3,325.00	0.00	95.53	09/11/2009
Allen,	773	Senior	7,300.00	-10,050.00	-2,750.00	-5,500.00	12/14/2011

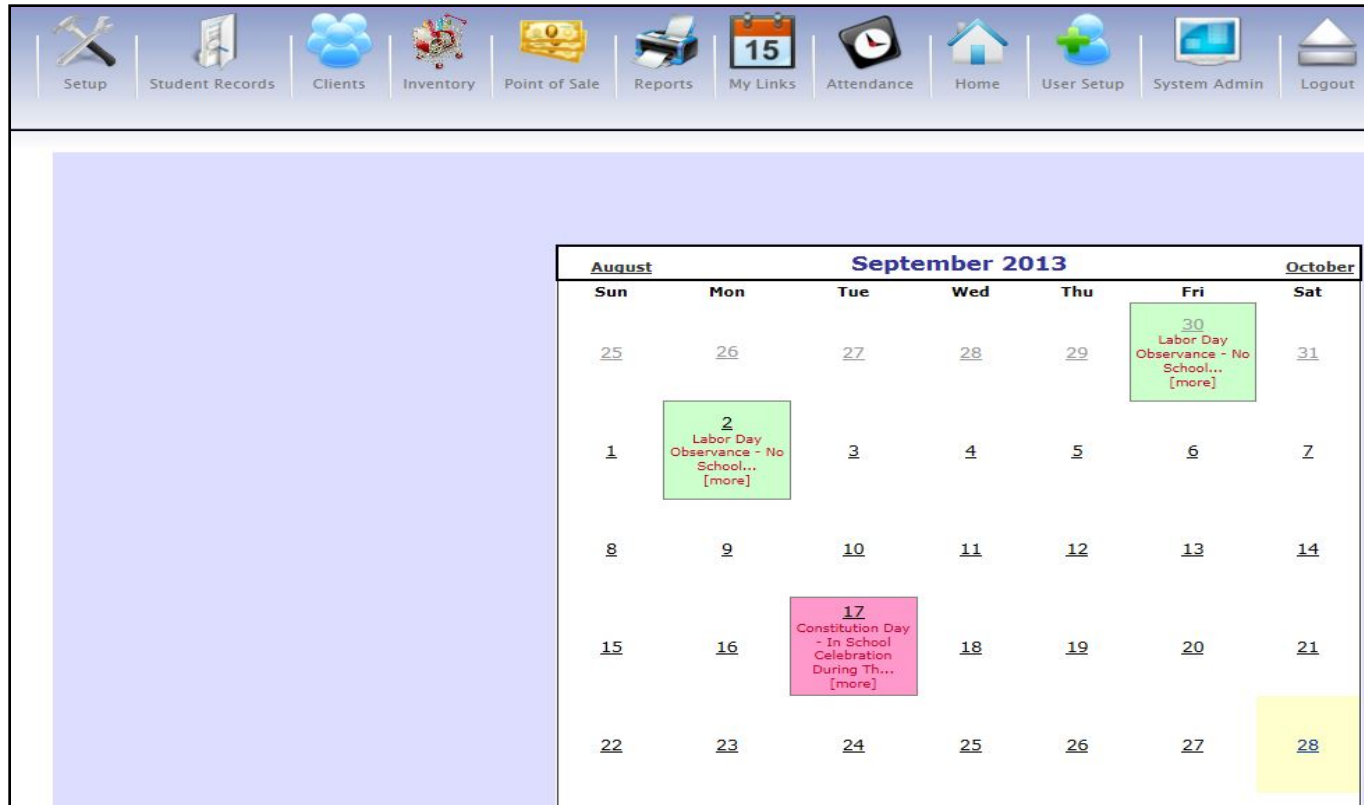
This report shows one line for each student and a school total at the end.

Reports – Student Financial

AR Student Ledger						
Student: Doe, Jane			Address: 102 Park Avenue Charlotte NC 28117			
ID #: 123123			Phone: (704) 662-8428		Status: Current	
Program: Cosmetology			Birthdate:			
Transactions between 10/30/2011 and 09/28/2013						Printed: 9/28/2013
Trans Date	Ledger Code	Description	Receipt/Check #	Debit	Credit	Balance
10/30/2011	Tuition	Charge		500.00	0.00	500.00
10/30/2011	Tuition	Payment		0.00	-250.00	250.00
11/06/2011	Tuition	Payment		0.00	-1,400.00	-1,150.00
11/07/2011	Pell Grant	Payment		0.00	-500.00	-1,650.00
11/13/2011	Tuition	Charge		5,000.00	0.00	3,350.00
11/13/2011	Tuition	Charge		200.02	0.00	3,550.02
11/13/2011	Tuition	Payment		0.00	-300.00	3,250.02
11/13/2012	Pell Grant	Payment		0.00	-900.00	2,350.02
09/28/2013	Tuition	Payment		0.00	-1,750.00	600.02
09/28/2013	Pell Grant	Payment		0.00	-500.00	100.02
				5,700.02	-5,600.00	100.02

This report shows one student's detail accounting history.

View School Calendar/Main Menu



To add events to the calendar, pick SYSTEM ADMIN then CALENDAR.

Inventory Report - Used

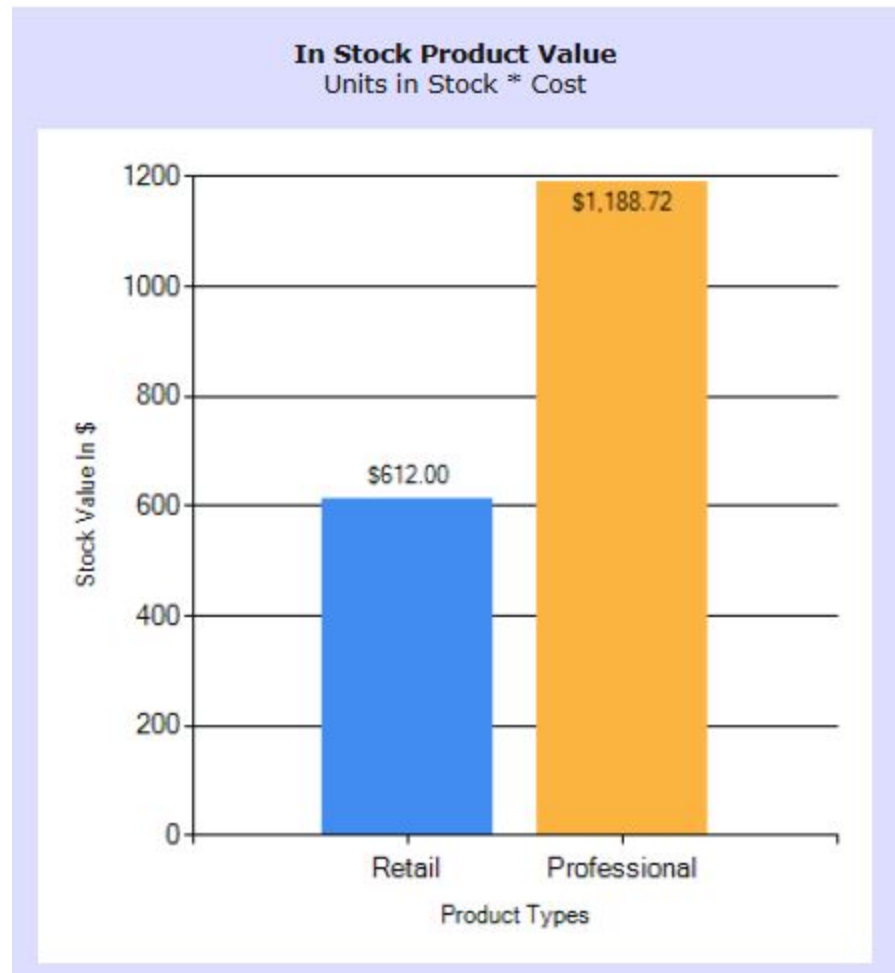
Professional Products Sales Summary			
Product Name	Qty Used	Total Cost	% of Used
Supplier: Cash & Carry Mfg: Reynolds Cat: Bulk Supplies Foil Sheets - 9in x 10 3/4in	1		
Subtotal:			
Supplier: CosmoProf Mfg: Iso Cat: Perm Supplies Option 1	1	\$18.60	1.25%
Subtotal:		\$18.60	
Supplier: CosmoProf Mfg: Iso Cat: Styling Product Daily Shape Working Spray	5		
Subtotal:			
Supplier: CosmoProf Mfg: Paul Mitchel Cat: Color Product 10 Volume Developer / 32oz	2	\$0.00	0.00%
20 Volume Developer / 32oz	21	\$0.00	0.00%
30 Volume Developer / 32oz	7	\$0.00	0.00%

To track received and/or used professional products, pick INVENTORY then INVENTORY TRANSACTIONS. You can scan The barcode on the product or enter the UPC code of the product. Then enter the amount used or received.

Inventory Report - Reorder

Product Name	Units In Stock	Reorder Level	Reorder Qty	Unit Cost	Qty * Cost	Qty / Unit	Order Amt
Supplier: Aesthetics Plus Advanced Training Center		Mfg: Janssen	Cat: Conditioner				
SS Optimal Tinted Complexion	0	1	0	\$40.00	\$0.00	1	
Supplier Total:					\$0.00		
Supplier: Aesthetics Plus Advanced Training Center		Mfg: Janssen	Cat: Special				
Opus Belle Travel Pack - 6 piece	0	1	0	\$20.00	\$0.00	6	
Supreme Secrets Travel Kit - 6 piece	0	1	0	\$20.00	\$0.00	6	
Mixed Secrets Travel Kit - 6 piece	0	1	0	\$20.00	\$0.00	6	
SA-O Golden Shimmer Face - 1.7oz	1	1	0	\$13.00	\$0.00	1	
Supplier Total:					\$0.00		
Supplier: Cash & Carry		Mfg: Reynolds	Cat: Bulk Supplies				
Foil Sheets - 9in x 10 3/4in	1	1	0	\$3.49	\$0.00	500	
Supplier Total:					\$0.00		

Products On Hand



Client Master Record

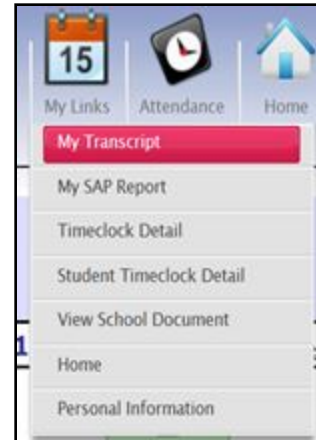
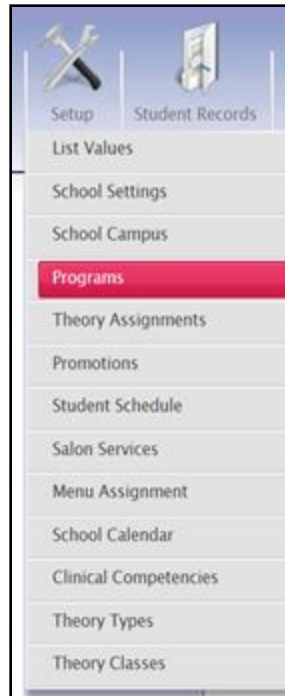
Client Master Record	
<div>DetailsNotesFormulasHistory</div>	
[return to client list]	
Wakefield, Louise	
Name and visit information	Address
First Name: <input type="text" value="Louise"/>	Address1: <input type="text" value="202 Park Lane"/>
Middle Name: <input type="text" value="Mary"/>	Address2: <input type="text"/>
Last Name: <input type="text" value="Parker"/>	City: <input type="text" value="Charlotte"/>
First In Date: <input type="text" value="02/06/2013"/>	State: <input type="text" value="North Carolina"/>
Last In Date: <input type="text" value="09/25/2013"/>	Zip: <input type="text" value="28117"/>
Number of Visits: <input type="text" value="36"/>	School Campus: <input type="text" value="Default Campus"/>
Total Services: <input type="text" value="\$257.00"/>	
Total Retail: <input type="text" value="\$0.00"/>	
Total Purchases: <input type="text" value="\$257.00"/>	
Fields in red text are view only fields.	
Contact Information	Info
Home: <input type="text" value="(509) 946-4585"/>	Gender: <input type="text" value="Female"/>
Cell: <input type="text" value="704-665-9999"/>	Birthday: <input type="text"/>
Work: <input type="text"/>	Occupation: <input type="text" value="Self Employed"/>
Email Address: <input type="text" value="louise@americassoftware.com"/>	Referral: <input type="checkbox"/>

Client History/Formulas

Client Master Record			
Details	Notes	Formulas	History
[return to client list]			
Wakefield, Louise			
Date	Item Description	Student	Price
09/25/2013	Haircut	Rodriguez Wendy	6.00
09/25/2013	Wet Set	Rodriguez Wendy	6.00
09/18/2013	Manicure	Rodriguez Wendy	10.00
09/18/2013	Wet Set	Rodriguez Wendy	6.00
09/11/2013	Wet Set	Gonzales Misty	6.00
09/04/2013	Wet Set	Gonzales Misty	6.00
08/21/2013	Manicure	Gonzales Misty	10.00
08/21/2013	Wet Set	Gonzales Misty	6.00
08/14/2013	Manicure	Gonzales Misty	10.00

To enter formulas, pick the FORMULA tab on the master client profile.

Menu Assignment Setup



Setup OnlineDiscoverypro to meet your needs using the SETUP menu. If desired, students can login to view their progress, school documents, calendar and more. Give them menu options to features under the MY LINK section of Menu Assignment.

Track Prospective Students

Prospective Students

Student Name:

[Add New](#) [Export](#) [Update](#) [Delete](#) [Make Active](#)

First Name: Program:

Middle Name: Campus:

Last Name:

Address 1:

Address 2:

City:

State: Zip:

Home Phone: Cell Phone:


Birth Date: Email:

Application Date: Lead Source:

Notes:

5/9/13 Email RR

4/30/13 VM SP



Setup Salon Services

Cash Register and Scheduler

Client Services

[Print All Services](#)

Types

☒ cosmetology ☐ esthetician ☐ manicuring ☐ teacher training esth ☐ teacher training-c

Add New Service: 10 Haircut

Modify Existing Service: 10 Haircut

Competency: Haircuts

Price: 11.00 Taxable: ☐

Estimated Duration: 0.50 (1.5 = 1hr 30 min)

Appointment Color: FFFF00 sample

Client Service: ☒

[Update Service](#) [Delete Service](#) [Clear Form](#)

- Setup Salon Services.
 - Services must be setup and the estimated duration time must be set so the scheduler knows how long to schedule the service for.
 - You can change the duration of the appointment after it's made by using your cursor to expand the appointment on the scheduler.
 - If you want the student to get credit in a particular state board competency group when they perform the service then associate the service with the state board competency by picking it in the Competency drop down list.
 - Each program has its own set of services.
 - You may determine the color of the service as it appears on the schedule in the Appt. Color field.

Cash Register - 1

View previous transactions here. To modify a transaction you must setup and enter a register password under **SETUP SCHOOL SETTINGS**

Current User: Admin, Admin [Current Transaction](#) [Previous Transactions Management](#)

1. Select Client

To search a Client or Student, type in the respective drop-down lists.

Pick a Client: [Quick Add](#)

2. Select Student then Add Services, Products, Gift Certificates to Cart

Student: UPC: [Add](#) Tip: [Add Tip](#)

Add	Services	Price
<input checked="" type="checkbox"/>	Electrical Facial	\$22.00
<input checked="" type="checkbox"/>	Facial	\$0.00
<input checked="" type="checkbox"/>	Haircut	\$0.00

No products offered.

Gift Certificate:

Cert No:

Amount:

Expires:

Notes:

Sold By: Admin, Admin [Add Certif](#)

3. Manage Shopping Cart

Delete	Product/Service	Quantity	Price	Promotion	Discount	Discount Amount	Tax	Total Amount	Sold By/Student
<input type="checkbox"/>	Electrical Facial	<input type="text" value="1"/>	\$ 22.00	--Select--	<input type="text" value="0"/>	\$0.00	\$0.00	\$22.00	Hill, Laurel - 94
<input type="checkbox"/>	Facial	<input type="text" value="1"/>	\$ 0.00	--Select--	<input type="text" value="0"/>	\$0.00	\$0.00	\$0.00	Hill, Laurel - 94
<input type="checkbox"/>	Haircut	<input type="text" value="1"/>	\$ 0.00	--Select--	<input type="text" value="0"/>	\$0.00	\$0.00	\$0.00	Hill, Laurel - 94

[Update Cart](#)

Pick a client then a student. Pick one or more services and then pick ADD. Pick a product and then pick ADD. Changes to prices can be made in the Manage shopping cart section. The next slide shows how to apply the payment.

Cash Register – 2

Apply Payments

4. Manage Payments and Checkout

Payments Made

	Payment Method	Amount
[delete]	VISA	\$41.94

Order ID #: 1-130928-002

Summary

Subtotal: \$44.25
Discount: (\$2.31)
Tax: \$0.00
Total: \$41.94
Payments: (\$41.94)
Balance: \$0.00
Change: \$0.00

Apply Payments

Payment Method: --Select--
Amount: 0.00
Apply Payment

Complete

Open Drawer

Receipt

Transaction Complete.

New Client >>

Pick the payment method and enter the amount tendered under APPLY PAYMENTS. Next pick **APPLY PAYMENT**. The payment will now appear under the SUMMARY section. If the SUMMARY is correct pick **COMPLETE** then Select **NEW CLIENT** to start a new ticket. Cash register reports, including End of Day reports are located on the **REPORTS** menu.

End of Day Sales Report

Sales Report			
Shift	ALL		Date: 09/28/2013
INCOME:			
+Services:	1,863.25		
+Products:	69.41		
+Tax Withheld:	4.68		
-Returns:	0.00		
+Tips Withheld:	0.00		
+Gifts Certs Purchased:	0.00		
+Gifts Certs Redeemed:			
Total:	1,912.85		
Petty Cash In:			
Petty Cash Out:			
Grand Total:			
Payment Type Totals:		# Tickets	
Cash	644.99	35	
Check	229.18	8	
Credit Card	1,085.59	38	
Change	-46.91		
Total	1,912.85	81	
Sales Statistics:			
Avg Ticket:		23.62	
Top Selling Service:	24 Perm Color Retouch	536.50	
Lowest Selling Service:	28 Temp Rinse	5.25	(Does not include services w
Top Selling Product:	Retail 1	50.45	
Lowest Selling Product:	Retail 2	18.96	(Does not include products w
Sales by Program:			
COS PT		578.10	
Cosmetology		1,323.56	
Esthetician		31.00	

Gift Certificates

- Add a new gift certificate Redeem a gift Certificate

Gift Certificates

Cert No:	<input type="text" value="101"/>
Amount:	<input type="text" value="50.00"/>
Expires:	<input type="text" value="1/17/2018"/>
Notes:	<input type="text"/>
Sold By:	<input type="text" value="admin, admin"/>
<input type="button" value="Add Certificate"/>	

Use Gift Certificate

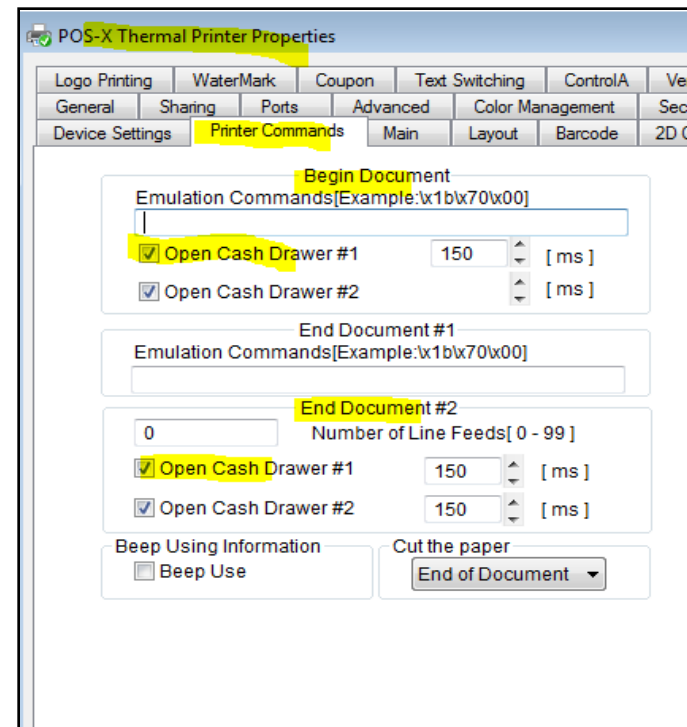
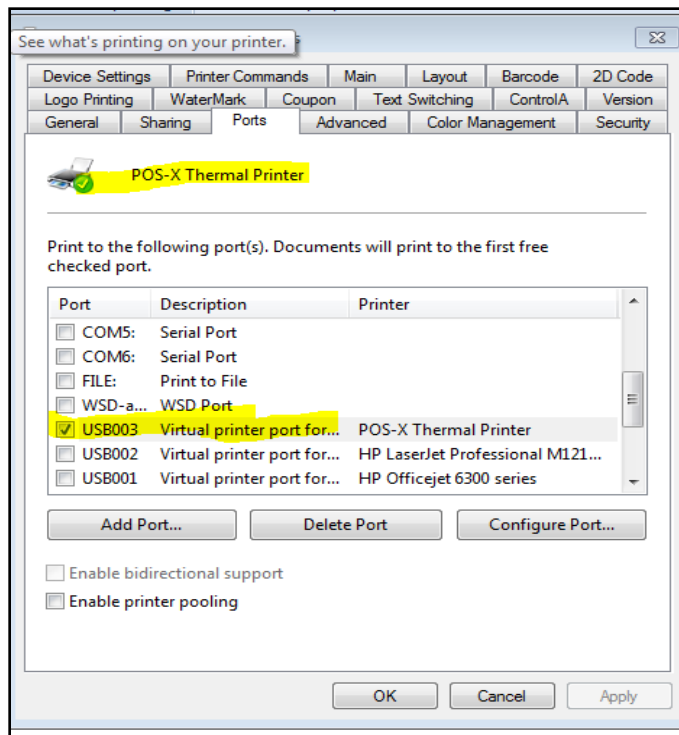
Certificate No:	<input type="text"/>	<input type="button" value="[search]"/>	<input type="button" value="Pay"/>
Amount Available:	<input type="text" value="(\$0.00)"/>		
Amount Used:	<input type="text"/>		
<input type="button" value="Apply Gift"/>			

To create a gift certificate on the cash register, pick a client then pick the student. On the far right of the cash register you will see the gift certificate section (screen shot 1). Complete the fields and pick ADD. This adds the amount of the gift certificate to the sales ticket similar to the way a service does. To redeem a gift certificate you enter the gift certificate number on the left in the payment section (screen shot 2). The amount available on the certificate will appear automatically. Then type in the amount they want to use and press APPLY GIFT. This will send this amount to amount tendered field. This info will print on EOD sales reports.

Cash Drawer/Receipt Printer

We support Evo receipt printers and MMF printer driven cash drawers for the web-based software.

1. Connect receipt printer to computer (USB) and cash drawer to the receipt printer (RJ11).
2. Install printer drivers from www.pos-x.com/drivers - Windows 7 driver or Windows 8, typically.
3. Go into Printer Settings and configure the printer for the port it is attached to (typically USB). Last, tell the printer when to open the cash drawer. (before the receipt, after or before and after)
4. Install receipt printer paper. There is a correct side and an incorrect side. If the receipt prints BLANK then you have the paper installed incorrectly. Flip it over to the thermal side.
5. The cash drawer automatically opens whenever a receipt is printed.



Appointment Scheduler

The screenshot shows a web-based setup form for an appointment scheduler. At the top, there is a blue button labeled "Update Campus" and a red message "Campus Saved". Below this, the form contains several input fields and checkboxes. The "Campus Name" is set to "Greensboro NC" via a dropdown menu. There are empty text boxes for "Address 1:", "Address 2:", "City:", "State:" (with a "--Select--" dropdown), and "Zip:". The "Tax Rate" is set to "0.00000" with a note "(Enter 0.075 for 7.5%)". The "License" field is empty. The "Time Zone" is set to "Eastern Standard Time (EST)" via a dropdown. The "Use Server Time*" checkbox is checked. Below this, a note states: "*Server time will be used for TimeClock. Time zone adjusted server time: 6:44:16 AM". The "Clinic Appointments Timespan:" is set to "15 Minutes" via a dropdown. The "Clinic Start Time:" is set to "7:00 AM" and the "Clinic End Time:" is set to "6:00 PM", both with clock icons for selection. The "Use Webcam:" checkbox is unchecked. The "Session Timeout:" is set to "600" with a note "(Default 60 minutes)". The "Register Password:" field is empty. The "Auto Print Receipt" checkbox is unchecked. There is a large text area for the "Receipt Disclaimer:". At the bottom, there is a green "GOBADBY" logo with the text "VERIFIED & SECURED" and "VERIFY SECURITY".

- The following are items that must be setup before you can use the appointment scheduler.
 - SETUP CAMPUS. ADVANCED SETTINGS. You must pick the time span an you desire for the appointments. i.e. 10 minutes, 15 minutes.
 - You must enter the clinic start and end time. Make sure you use AM and PM appropriately.
 - Make sure your timezone is selected.
 - If you are using the cash register with the scheduler you should setup a password that allows you to modify completed cash register transactions and customize a receipt disclaimer, if desired.

Schedule an Appointment

Program: **Cosmetology**

Show Students By

☒ Last-Name first (Smith J)

☐ First-Name first (John S)

« « Sep 2013 - Nov 2013 » »

September

S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

October

S	M	T	W	T	F	S
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

« today » Saturday, September 28, 2013

	Anthony A	Arlon E	Armstead E	Black J	Camp K	Carter 1
9:00am						
9:15am						
9:30am	WALK, IN 19					
9:45am	Weaving					
10:00am	WALK, IN 250 Facial			Parker, Jane 1 Shampoo Only		
10:15am						
10:30am		WALK, IN 1 Shampoo Only				
10:45am			Smith, Cassandra 1 Shampoo Only			
11:00am				Parker, Jane 2 Shampoo		
11:15am						
11:30am		WALK, IN 11 Clipper		Parker, Jane 3 Shampoo		Long, Karen 273 Make-Up applicatio
11:45am						
12:00pm		WALK, IN 16 Relaxer: Virgin	Smith, Cassandra 22 Frost	Parker, Jane 4 Shampoo, Blow Dry Short		
12:15pm						
12:30pm						
12:45pm						
1:00pm						
1:15pm						

- Schedule an appointment.
 - Double click in any cell. A popup will appear allowing you to pick a client and the services being scheduled. Once completed click OK and appointment will appear on the schedule.
 - You can view the schedule by PROGRAM on the left and change the student's name from last name, first to first name, last. To print appointment reports click REPORTS and to locate a client's appointments click FIND BY CLIENT.
 - To check in a client, right click and pick CHECKIN. It turns the bottom of the appointment red. To check out a client, right click and pick CHECKOUT. This causing the cash register to open and sends the schedule information to the register. Once checked out return to the schedule and bottom of appointment will turn green. You can also print a client ticket by right clicking and pick PRINT TICKET.
 - BLOCK cells. To block out a period of time, click in the cell, right click and pick BLOCK then scroll down.

Scheduler Reports

Clinic Appointments Reports

Select Report: Appointment Schedule (One Student per Page) ▼

Program: COS PT ▼

Student: ~Select~ ▼

Date Range: ☒ Today ☐ Yesterday ☐ This Week ☐ Last Week
☐ This Month ☐ Last Month ☐ This Quarter ☐ This Year

OR

From 10/17/2013 to 10/17/2013

Output: ☒ View in your browser ☐ PDF ☐ Excel ☐ Word

Submit Reset

- Print appointment reports. Pick REPORTS from the main schedule. Reports available are
 - Appointment schedule
 - Appointment confirmation report
 - Appointment no show report
 - Scheduled services
 - Print tickets by Date.