

Setting up your Company Details

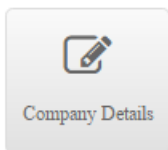
This section is completed to give your company a full identity. This section also deals with various customisations of messaging, registration forms, and registration fees

Quick Guide...

- Go to your AdminOnline dashboard under the *Settings* section
- Click on the “Company Details” button
- There are 4 sections here
 - Company details
 - Company financial details
 - Company member details
 - Company member field rules

Step by step in detail...

- Go to your AdminOnline Dashboard
- Click on your “Company Details” button under the *Settings* section



There are 4 sections

1. Company Details

Company Name : AdminOnline	1	Contact Number : 0849839933	2
Email : raymond@jjalia.co.za			
Fax Number :			
<input type="checkbox"/> Is your postal address the same as the street address?			
Street Address Line1 : 58 Die Uitsig Street	3	Postal Address Line1 : 58 Die Uitsig Street	3
Line2 :		Line2 :	
Suburb : Eldoraign		Suburb : Eldoraign	
City/Town : Centurion		City/Town : Centurion	
Code : 0157		Code : 0157	

1. Complete your company name which will be used by the system when sending statements and welcome emails
The email you enter here will be the *From* email address from which your parents receive their statements, invoices, receipts and messaging
2. Your cell phone number will be used as a platform to send the statement, receipt, invoices and messages to parents if they selected communication via sms. Your number does not display on their cell phones
3. Your statement which parents receive will have your address on it.

2. Company Finance Details

Company's Financial Details

1 No Due Date

Payment Due Date :

2 Company Registration Number :

3 VAT Registered

4 Enable Pro Finances

1. If you want a date to appear on your statement next the words “Payment Due”. Then leave the box uncheck, Checking the box will remove the date and only leave the words “Payment Due”
2. If you have a Company Registration number, you can complete it here and it will show on your statements and invoices
3. If you are VAT registered and charge VAT, check the box.
4. Enable Pro Finances when checked sets the system in strict Accounting mode. If Pro Finances is unchecked, you can remove incorrect transactions with ease instead of doing a counter transaction as with Pro Finances switched on.

3. Company Member Details

Company's Member Details

① Delete Bank Recon Done Days :

② No. of Statement Months Shown :

③ Charge registration fee per account

④ Allow the selection of multiple services during registration

⑤ Member Registration Fee :

⑥ Send Registration Welcome Email From Outside Registration Form

1. When you import your bank statement into the “Bank Recon”, you allocate those transactions to the relevant parent account or Income/Expense accounts then approve it, after the amount of days set here all and ONLY Approved transactions will be removed from the list. It does not remove the transaction in the account you approved it to, merely just take it off the Bank Recon list because it’s done.
2. Here you set the amount of month’s back, of transactions from the date you send the statement. Above 6, means the last 6 months of transactions will be presented on the statement to the parent
3. If you check this box, the system will charge the registration fee set in #5 only once for every family account. If you charge per child, then leave the box unchecked.
4. If a child is able to take more than 1 service in your business, then check the box so the registration form question “Services” allows for multiple selections.
5. Enter amount here which will charge the registration fee per child. Registration fee are activated via the registration form per child, or if you later add a child to an existing account
6. There is a customisable Welcome email which can be set to go out automatically or not. By having a check mark in the box, the Welcome email will be sent to a person who is newly registered, only if the Outside Registration form was used. Big green button (New Registration)

Member Payment Instructions :	ADD YOUR BANKING DETAILS HERE ①
Member Terms & Conditions :	ADD YOUR TERMS AND CONDITIONS HERE ②

1. Add your banking details in here, they will be presented on all your statements and invoices
2. Add your Terms & Conditions in here. We like to assist you on this as we code it a little to make it look good and legible

Registration Email Message :	<p>Dear Mr/Mrs %s Welcome to %s. You are now successfully registered on our AdminOnline system. Your new account number is: %s IMPORTANT: Please use this number in all your EFTs and correspondence.</p> <p>Please note that our fees will be charged at month end. We always charge for the coming month in advance. On this date, you will receive a statement from us showing all account history and amount outstanding.</p> <p>We will be loading registration fees and pro-rata fees if applicable before month end.</p> <p>You can login to our AdminOnline system from this URL: http://gilbert.adminonline.co.za Use this email address and the password supplied during registration to log in. If you don't know your password, use the forget password button and form to retrieve it.</p> <p>From this login you will be able to: - View your latest statement</p> ①
Send Statement Email Text :	<p>Account Number %s Dear Mr/Ms %s</p> <p>Please find attached your latest statement that reflects the amount outstanding (or in credit) on your account. Please note that payment is due on the first of each month.</p> <p>Kind Regards</p> ②

1. This message is automatically sent to a parent after completing the registration form. The %s is coding to go fetch parent's details and automatically add into the message for that personal touch. Example Dear Mr/Ms Raymond Purdon
2. This message accompanies your statements on email, including their account number and addressing them on their name and surname

Send Statement SMS Text :	%s Statement: Dear %s, your account %s balance with us is %s. Kind Regards	1
Send Invoice Email Text :	Account Number %s Dear Mr/Ms %s Please find attached your latest invoice. Please note that payment is due on the first of each month. Kind Regards	2
Send Invoice SMS Text :	%s Invoice: Dear %s, an invoice on your account %s of %s has been issued. Kind Regards	3
Send Receipt Email Text :	Account Number %s Dear Mr/Ms %s Please find attached your receipt. Thank you for the payment! Kind Regards	4
Send Receipt SMS Text :	%s Receipt: Dear %s, I have received your payment on account %s of %s. Thank You	5

1. Send Statement via sms will read as *“Company name” statement. Dear Raymond Purdon, your account 12345 balance with us is R250,00. Kind Regards*
2. Send Invoice via email will read as...
Account number 12345
Dear Mr/Ms Raymond Purdon...and you can configure the rest of the words
3. Send Invoice via sms will read as *“Company name” Invoice : Dear Raymond Purdon, an invoice on your account 12345 of R250,00 has been issued. Kind Regards*
4. Send Receipt via email will read as...
Account number 12345
Dear Raymond Purdon...and the rest you can configure
5. Send Receipt via sms will read as *“Company Name” Receipt. Dear Raymond Purdon, I have received your payment on account 12345 of R250,00. Thank you*

4. Company Member Field Rules

Question 1 to 17 – Field Label can't be edited, but you can set the field status

Field Description ^	Field Label	Field State
01 Parent/Adult Birthday	Not Configured	Hidden
02 Parent/Adult Gender	Not Configured	Hidden
03 Parent/Adult ID/Passport	ID Number of Person	Optional
04 Parent/Adult Home Telephone Number	Not Configured	Hidden
05 Parent/Adult Work Telephone Number	Not Configured	Hidden
06 Parent/Adult Address	Not Configured	Hidden
07 Child/Attendee Birthday	Not Configured	Mandatory
08 Child/Attendee Gender	Not Configured	Mandatory
09 Child/Attendee ID Number/Passport	ID Number of member	Optional
10 Child/Attendee School Grade	Schooling Grade	Mandatory
11 Child/Attendee Group/School/Class Name	Class or Schools	Mandatory
12 Child/Attendee Medical Notes	Not Configured	Mandatory
13 Child/Attendee Left/Right Handed	Not Configured	Hidden
14 Child/Attendee Transport Needed	Not Configured	Hidden
15 Account/Family Doctor	Give me the Doctor	Hidden
16 Account/Family Medical Aid	Not Configured	Optional
17 Account/Family Payment Terms	Not Configured	Hidden

Question 18 to 32 – Questions are placed on the **Parents** part of registration form

You can edit the Field Label and set the Field Status (Customisable)

Question 18 to 22 – Questions features a drop down list for your answers

Question 23 to 32 – Questions features an open text box to type in answers

18 Account/Family Custom Question 1	Not Configured	Hidden
19 Account/Family Custom Question 2	Not Configured	Hidden
20 Account/Family Custom Question 3	Not Configured	Hidden
21 Account/Family Custom Question 4	Not Configured	Hidden
22 Account/Family Custom Question 5	Not Configured	Hidden
23 Account/Family Custom Question 6	Next of Kin : Name	Optional
24 Account/Family Custom Question 7	Next of Kin : Cellphone	Optional
25 Account/Family Custom Question 8	Not Configured	Hidden
26 Account/Family Custom Question 9	Not Configured	Hidden
27 Account/Family Custom Question 10	Not Configured	Hidden
28 Account/Family Custom Question 11	Not Configured	Hidden
29 Account/Family Custom Question 12	Not Configured	Hidden
30 Account/Family Custom Question 13	Not Configured	Hidden
31 Account/Family Custom Question 14	Not Configured	Hidden
32 Account/Family Custom Question 15	Not Configured	Hidden

Question 33 to 47– Questions are placed on the **Childs** part of registration form

You can edit the Field Label and set the Field Status (Customisable)

Question 33 to 37 – Questions features a drop down list for your answers

Question 38 to 47 – Questions features an open text box to type in answers

33 Child/Attendee Custom Question 1	Not Configured	Optional
34 Child/Attendee Custom Question 2	Not Configured	Hidden
35 Child/Attendee Custom Question 3	Not Configured	Hidden
36 Child/Attendee Custom Question 4	Not Configured	Hidden
37 Child/Attendee Custom Question 5	Not Configured	Hidden
38 Child/Attendee Custom Question 6	Not Configured	Hidden
39 Child/Attendee Custom Question 7	Not Configured	Hidden
40 Child/Attendee Custom Question 8	Not Configured	Hidden
41 Child/Attendee Custom Question 9	Not Configured	Hidden
42 Child/Attendee Custom Question 10	Not Configured	Optional
43 Child/Attendee Custom Question 11	Not Configured	Hidden
44 Child/Attendee Custom Question 12	Not Configured	Hidden
45 Child/Attendee Custom Question 13	Not Configured	Hidden
46 Child/Attendee Custom Question 14	Not Configured	Hidden
47 Child/Attendee Custom Question 15	Not Configured	Hidden

Once you have completed setups of your Services, Schools/Class/Groups and your Company details, you are ready to start adding children to your AdminOnline system