

Dashboard Overview

1. Menu

The menu focuses on your daily and monthly functionality where you can access your customers, accounting, bulk billing, bulk statements, attendees, bank imports, company expenses, reports, admin inbox & new account

2. Messages

Here we have additional functionality whereby you can set yourself reminders on the system or track all your email and sms's that have been sent from the system

3. Staff & Attendance

This section focuses on the setting up of your time slots in the "Calendar" for coaches or teachers and the allocation of children to the relevant slots. The section provides a "Staff" function whereby you can add your teachers or coaches onto the system for later allocation to slots. The option to take attendance is also available on the buttons "Attendance" and "Coach Class"

4. Company Overview

Here you get a quick general view on your number of family accounts, children, and total services taken by the children. We present active accounts, active attendees, active services, active accounts in debt, inactive accounts in debt & active attendee without services

5. Financial Overview

Here you have a quick general view of your current financial standings where we show you invoiced for year, revenue for year, expenses for year, other journal for year, active customer outstanding debt, active customer credit & inactive customer credit

6. Settings

This section offers you options to modify the behaviour of your system and what is presented. You have the option to change passwords, services, company details, schools/class/groups, competency level, venues & chart of accounts

1. Menu

- **Customers** – provides you mainly with the information of the parents who are liable for the accounts. You are provided with multiple options to edit the information, cancel or reactivate accounts or even export the list to excel
- **Accounting** – focuses on the financial functionality applicable to accounts, whereby you can charge, receipt and do financial corrections. Additional options to manage accounts individually are also present to send statements, invoices or receipts to account holders. Included is “Account Profile” in order to quickly view and amend details of a family account.
- **Bulk Billing** – services created can be linked to attendee’s which in turn are linked to the accounts. You can use this option to bill/invoice all or selected services and the system will charged those attendee’s linked to the service. Discounts set in the family accounts profile will be included in the bulk charging/invoicing and listed for your approval.
- **Bulk Statements** – again another time saver where you send out your statements in bulk on a specific date and set time, you can select to send statements to “All your Active accounts”, “Accounts that are in debt (Owe you money)” or even select accounts that are related to a specific service that a child has. Inactive accounts on your system are not included in the statement run and must be managed individually.
- **Attendees** – here you provided with a list of all your children/attendee’s (Persons linked to services) in your business, they are tagged to all there relevant information whereby you can use the filter to create your own list and export to excel or send a message. Messages can be sent out via sms or email and be personalised to include names, surname, account number or balances of account
- **Bank Import** – here you can import your downloaded CSV bank statements into your system and then allocate your parent payments and all other incomes and expenses. This can be used to replace individual or manual receipting parent accounts in accounting or capturing expenses through company expenses. This only applies to EFT transactions reflecting through your bank account.
- **Company Expenses** – here you individually manage your debits and credits for the companies expenses, salaries, rent, petrol, loans etc

- **Reports** – here you can export various reports at your leisure from class lists, attendance registers, journal entries, company totals and your trial balance plus more
- **Admin Inbox** – this is your personal assistant which notifies you of incoming registration forms completed indicating services of attendees selected, messages from parent or coaches, request for details changes on parents profile via their portal. From here a registration by a parent can be approved by you. This will automatically activate the account in which the child is in.

2. Messages

- **Reminders** – here you can set a reminder for yourself. The Admin Inbox will populate the message on the date you set it to appear
- **Emails Sent** – here you can trace all the emails that were sent from the AdminOnline system from statements, welcome and general communication emails. You can trace emails through the filters on address, dates, descriptions and monitor if they went out your system successfully
- **SMS Sent** – here you can track back all the sms's that were sent from the AdminOnline system, such as statements and general communication sms's. You can trace an sms by the mobile number, description or date it was sent, and monitor if they went out of your system successfully

3. Staff & Attendance

- **Calendar** – here you create your time slots for coaches/teachers, add children to those time slots, and the coach/teacher can take their attendance from any smart mobile device.
- **Coach Class** – this attendance register is designed to be used on a larger interface...laptop, desktop or tablet. This gives the user access to all time slots created on the system, irrelevant of whom the coach/teacher is.

- **Attendance** – this attendance register is designed to be used on a smaller interface, like a mobile phone or small tablet. Only the slots allocated to the user are presented.
- **Staff** – this is where you add the details of your teachers or coaches, this later will create a list inside your calendar slots for you to assign the teacher or coach to that specific time slot.

4. Company Overview

Here we created a quick view of the...

- Active family accounts currently in your business
- Active attendees currently in your business from those active accounts
- Active service links taken select for active attendees
- Active attendees that are not linked to a service
- Active accounts that are in debt
- Inactive accounts that are in debt

5. Financial Overview

Here we created a quick view showing...

- Invoiced for the year as from 1st Jan
- Revenue for the year as from 1st Jan
- Other journals for the year as from 1st Jan
- Expenses for the year
- Active customers outstanding debt
- Inactive customers outstanding debt
- Active customer credit
- Inactive customer credit

6. Settings

- **Change Password** – here the super user can change their login and password details. This only applies to the super user who is currently logged in
- **Services** – here you can create your reoccurring services in your business. The services created here will automatically be presented on the registration form for an attending member.
- **Company Details** – is where you fine tune your businesses information. Adding or changing emails of the system, customisation of auto text messages of emails and sms's, bank details, due dates, postal address and includes the customisation section for your registration form.
- **School/Class/Group** – this tagging feature can be used to ask a parent what school or place a child is from, or it could be used for you to allocate a child to a specific group or class
- **Competency Level** – you can add a list of competency levels applicable to your business. And then later tag a child to that competency level
- **Venues** – list of venues where you physically give the service, the venue is used only in the calendar to identify the venue of the slot. This is not presented on the registration form.
- **Chart of Accounts** – Group or list of your accounts which you can add or edit. The list in your chart of accounts factor into your Trial balance and General ledger which can be extracted from your Reports function