

The House Manager

SUMMIT TECHNOLOGIES, INC.

The House Manager

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Getting Started

Installing and Running The House Manager

What You Need

To properly install, configure, and operate The House Manager, you need to have the following equipment:

Minimum Requirements for a PC System:

- 486/50 processor
- 8 Mb of RAM
- 8 Mb free hard drive space

- Microsoft Windows 95 operating system

Recommended Hardware with Windows 95:

- Pentium 90 Mhz or faster
- 16 Mb of RAM or more
- 10 Mb of free hard drive space

Recommended Hardware with Windows NT:

- Pentium 133 MHz or faster
- 24 Mb of RAM
- 10 Mb of free hard drive space

Minimum requirements for a MacOS system:

- 68030 Mac, Mac IIfx or higher
- 4 Mb of RAM
- 8 Mb of free hard drive space
- System 7.0 or higher

Recommended MacOS hardware and operating system:

- PowerPC Macintosh
- 12 Mb of RAM
- 10 Mb free hard drive space
- System 7.5 or higher

or...

- PowerPC processor
- 12 Mb of RAM
- 10 Mb free hard drive space
- System 7.5 or higher

Note: *The minimum hardware requirements will allow The House Manager to function at low performance levels. We strongly recommend that you use The House Manager on a computer that meets or exceeds the recommended CPU speed.*

Installing The House Manager

The House Manager is shipped on a standard CD-ROM disk.

Note: *For information on other media formats for The House Manager, please call Summit Technologies, Inc. at (970) 495-9790.*

The enclosed CD-ROM comes with an automated setup utility. This program asks you questions, copies files to your hard drive, and configures your computer for The House Manager.

Use the following steps to install The House Manager:

Windows 95 and Windows NT:

Insert The House Manager CD into your CD-ROM drive.

1. The CD will auto-start the setup program. Simply follow the directions.

Macintosh:

1. Insert The House Manager CD into your CD-ROM drive.
2. Double-click on The House Manager installer icon, and follow the instructions.

Starting The House Manager (Windows)



The House
Manager v2

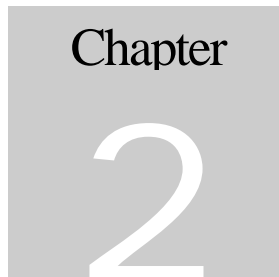
When you re-start Windows, you will see a new icon for The House Manager. Simply double-click the icon to launch the program.

Starting The House Manager (Macintosh)

When the installer has quit, you will see the House Manager icon. Simply double-click the icon to launch the program.

Setup

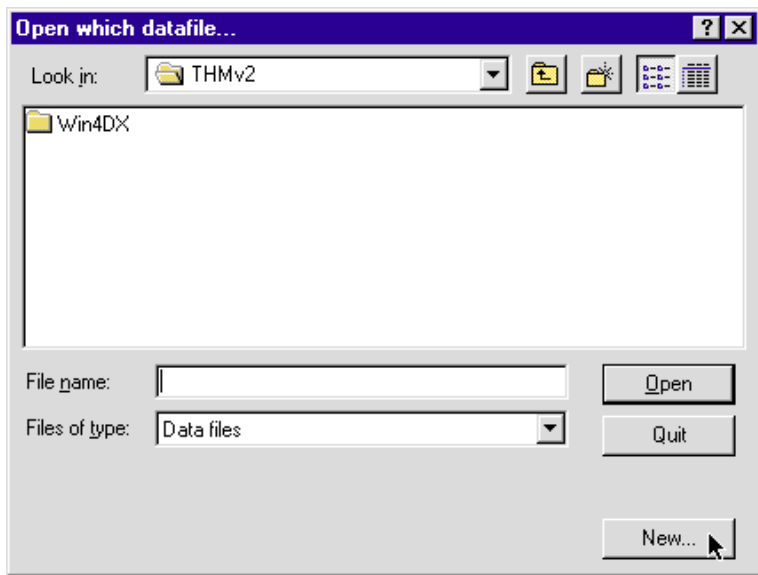
Getting The House Manager Set Up with Your Chapter's Information



You begin using The House Manager by entering some information about your chapter. The House Manager will guide you through this process when you first open a new data file.

Creating Your Chapter's Data File

When you first run The House Manager, the following dialog box will open:

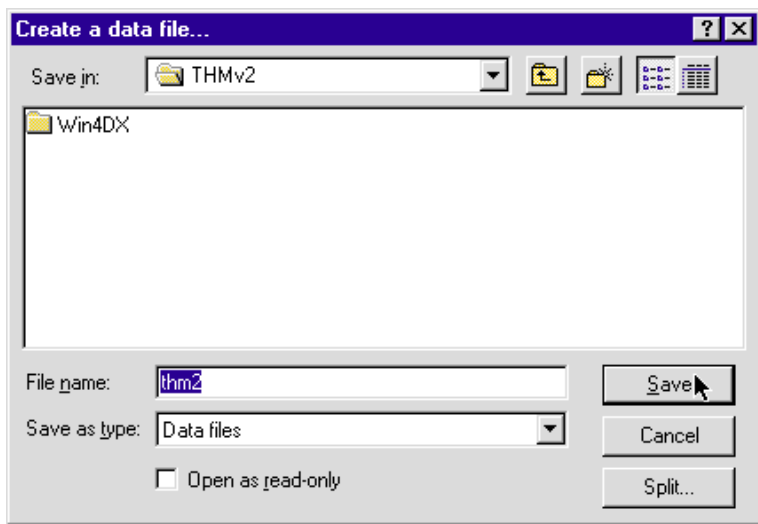


Click on New to open a new database of chapter information.

Create a New Data File

Now you will create a file for your chapter's particular data. A window entitled "Create a data file" will open with a suggested file name of "THM2". The suggested location is with The House Manager database.

Unless you have a reason to do otherwise, it's recommended that you accept the location and the name suggested here by clicking on the `Save` button.



The First Login

After you have opened a new data file, you will be shown the login screen:

Enter login information to access THM 2.0

User Name:

Password:

The House Manager requires a login user name and password to prevent unauthorized people from modifying your data. Since The House Manager contains financial information regarding your chapter, this is very important.

Changing Your Password

When you receive The House Manager, a user name and password have been set up for you, but you should change that very soon. (The chapter on Administration will show you how.) Because anyone who sees this manual will know the administrator's pre-set password, it's important to change that password so that this feature can protect your data.

To log in:

1. Type “**admin**” for your user name.
2. Press TAB to move to the password field.
3. Type “**admin**” for your password.
4. Click on Login.

Entering the Serial Key

When you login for the first time, you will see this message:

This is a full functioning DEMO version of The House Manager.

As a DEMO version, you may freely distribute this copy of The House Manager to anyone and you may have as many copies as needed on your computer.

To obtain the Serial Key for this copy of The House Manager, please contact Summit Technologies, Inc at 970-495-9790.

Serial Key:

841019

1. While you have the program running, call Summit Technologies at the number on the screen to obtain your serial key.
2. Enter that number into the serial key field.

If you are using The House Manager on a trial basis, click Continue.

Note: *The House Manager will function as a demonstration version for a limited number of uses or a limited amount of time. Thereafter it will stop functioning. For more information, please refer to the Software License Agreement or contact Summit Technologies, Inc. at (888) 883-7360.*

Personalizing Your Copy of The House Manager

Now you'll need to personalize The House Manager by typing in your organization and chapter name. Click on **License** to continue or **Quit** to exit.

Please enter the following information to personalize your copy of The House Manager.

Organization Name

Chapter

Organization Type Fraternity
 Sorority

The Chapter Information Screen

The next screen that will appear is the Chapter Information window. Your organization and chapter name have been entered for you. Now you need to type in the rest of your chapter's primary information.

Moving from Field to Field

The blank boxes that you need to complete are called "fields". When you are entering information into several separate fields, you can jump from field to field by using the Tab key. Also, you can move to the previous field by pressing Shift+Tab.

The country and the pledge name is filled in for you, but you are free to change it if you like.

Chapter Information...			
Organization Name	Chapter Name		
Alpha Omicron Pi	Beta Tau		
Chapter Address			
625 S Shields			
Chapter City	State	Chapter Zip	Chapter Country
Fort Collins	CO	80521	USA
Chapter Phone	Chapter University		
(970) 224-0180	Colorado State U		
Chapter Advisor	Advisor Phone #	Pledges are called	
Mike Codd	(970) 493-5261	Pledge	
Meeting Day	Term Type	Weeks in Term	
Monday	Quarter	9	
Make Checks Payable To			
Alpha Omicron Pi Beta Tau			
	Late Fee Amount	Amt Due Chapter	
<input type="button" value="Officer Info"/>	\$25.00	\$26,956.00	
	Organization Type	Primary Gender	
<input checked="" type="checkbox"/> Chapter is Active	<input checked="" type="radio"/> Fraternity <input type="radio"/> Sorority	<input checked="" type="radio"/> Male <input type="radio"/> Female	<input checked="" type="checkbox"/> Chapter has House

Enter your chapter's information in each field. Be sure to include the following information:

Term Type	Select the type of term you are in (semester, for example)
Weeks in Term	How many weeks the current term will last
Pledge Name	The name you give your pledges
Checks Payable	This will be displayed on all invoices

Some of these fields have pull-down menus associated with them. By clicking on these menus, a drop-down list will be shown. Just click on the appropriate item to select it.

Officer Info

If you would like to enter information about your officers, select the [Officer Info](#) button. You will see a list of the names and titles of all the officers in the chapter.

When the list of officer information is displayed, the `Officer Info` button will change to `Return`, and two new buttons will appear above the menu: `Add/Edit`, and `Delete`. If an officer is selected, the `Add` button will change to `Edit`. From here you can change the selected officer's name and title.

Chap: [] Adviser: [] Adviser Phone #: [(970) 493-5261] Pledge(s) also called: [Pledge]

Meeting Day: [Sunday] Term Type: [Semester] Weeks in Term: [15]

Make Checks Payable To: [Sigma Chi Beta Tau]

Officers: [Edit] [Delete]

[Return]

Officer Title	Officer Name
Consul	Nelson Howe
Pro Consul	Donald Kuchy
Queastor	
Steward	
Tribune	
Kustos	

Saving Changes to your Chapter Information

Once you have entered all of your chapter's details, the **Save** button will store them permanently.

Now that you've entered the essential information about your chapter, you can proceed to put in your member information.

If you need to modify your chapter's information, please refer to Chapter 3.

If you do not wish to save the changes you have made to this screen, simply press **Cancel**, and the screen will close without saving the edits you have made.

The Launching Station

Now that you've exited the Chapter Information window, you will see the launching station. Using the launching station to launch a function is easy. For example, if you wanted to add a new member,

1. Click and hold your mouse on the `Members` button. A list of functions related to members pops up.
2. Select "Enter New Member" from the list of choices.

It's that simple!

You might want to take a moment now to explore the lists of commands available from each button.

Tip: Can't see the launching station? It could be hidden. Try closing some windows.

Note: *This manual will be referring to the buttons on the launching station rather than the headings on the menu bar.*



Adding Member Information

The next step in setting up your house information in The House Manager is to enter your members. Please refer to the “Members” chapter for detailed instructions.

Adding a New Budget

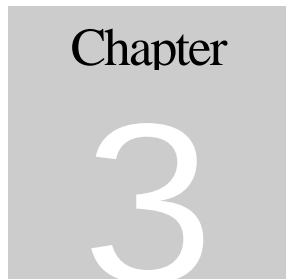
Once your member information is entered, you will need to create a budget for the year. These instructions are available in the “Adding a Budget” section in the “Billing” chapter.

Adding Account Information

The last step is setting up your banking. See the “Checkbook” chapter for instructions for entering your house’s checkbook information.

Chapters

Modifying and Printing Your Chapter Information



At some point you may want to change the data you entered for your chapter. Here are the steps to review your chapter information:

List Chapters

1. Click on the **Chapters** button on the launching station and select “List Chapters”. This window will open up:

Chapters: 1 of 1 records							
Active	Chapter Name	University	Chapter Phone	Chapter Advisor	Advisor Phone	# Mem	Receivables
<input checked="" type="checkbox"/>	Beta Tau	Colorado State U	(970) 224-0180	Mike Codd	(970) 493-5261	62	26,956.00

2. Now double-click on your chapter. The next screen that will appear is the Chapter Information window:

This screen contains the main information for your chapter. You can click in any text box to enter or to edit information. Use the TAB key to move from one field to the next.

Some of these fields have pull-down menus associated with them. By clicking on these menus, a drop-down list will be shown. Click on the appropriate item to select it.

Chapter Information...			
Organization Name	Chapter Name		
Alpha Omicron Pi	Beta Tau		
Chapter Address			
625 S Shields			
Chapter City	State	Chapter Zip	Chapter Country
Fort Collins	CO	80521	USA
Chapter Phone	Chapter University		
(970) 224-0180	Colorado State U		
Chapter Advisor	Advisor Phone #	Pledges are called	
Mike Codd	(970) 493-5261	Pledge	
Meeting Day	Term Type	Weeks in Term	
Monday	Quarter	9	
Make Checks Payable To			
Alpha Omicron Pi Beta Tau			
Officer Info	Late Fee Amount	Amt Due Chapter	
	\$25.00	\$26,956.00	
<input checked="" type="checkbox"/> Chapter is Active	Organization Type <input checked="" type="radio"/> Fraternity <input type="radio"/> Sorority	Primary Gender <input checked="" type="radio"/> Male <input type="radio"/> Female	<input checked="" type="checkbox"/> Chapter has House

Officer Info

If you would like to enter information about your officers, select the Officer Info button. You will see a list of the names and titles of all the officers in the chapter.

The screenshot shows a web application interface for managing officer information. At the top, there are several input fields: "Name" (filled with "Mike Codd"), "Phone" (filled with "(870) 493-6261"), "Pledge" (filled with "Pledge"), "Meeting Day" (filled with "Sunday"), "Term Type" (filled with "Semester"), and "Weeks in Term" (filled with "15"). Below these fields is a "Name Checks Payable To" field filled with "Sigma Chi Beta Tau".

Below the input fields, there is a "Return" button on the left. Above a table, there are "Add/Edit" and "Delete" buttons. The table has two columns: "Officer Title" and "Officer Name".

Officer Title	Officer Name
Consort	Nelson Howe
Pro Consul	Donald Kachy
Overseer	
Insard	
Tribane	
Excor	

When the list of officer information is displayed, the Officer Info button will change to Return, and two new buttons will appear above the menu: Add/Edit, and Delete. If an officer is selected,

the **Add** button will change to **Edit**. From here you can change the selected officer's name and title.

Saving Changes to your Chapter Information

Once you have entered all of your chapter's details, the **Save** button will store them permanently. If you do not wish to save the changes you have made to this screen, simply press **Cancel**, and the screen will close without saving the edits you have made.

Printing Your Chapter Information

It may be handy to have a print-out of the information you have entered into the Chapter file. It's a snap to get the information on your screen onto paper.

1. Click on the **Chapters** button on the launching station and select "List Chapters". A window will open that displays your chapter information in abbreviated form.
2. Click once on your chapter's line to select it. The line will change color.
3. Click on the **Print** button on the menu bar at the bottom of the window.
4. The House Manager will ask you whether you want to print all the records in the list or only the highlighted ones. Click on the radio button beside "Highlighted Records Only" and click OK.
5. Now you have a choice of which report to print. Click on the radio button beside "Chapter Detail Info" and click OK.

6. The next window will be your printing window. This window will vary according to the model of your printer. If you need assistance with these options, please refer to the manual that came with your printer.

Print List of Chapters

If you have a multiple chapter license for The House Manager, you can print a list of your chapters using these instructions:

1. Click on the **Chapters** button on the launching station and select “List Chapters”. A window will open that displays your chapter information in abbreviated form.
2. Click once on your chapter’s line to select it. The line will change color.
3. Click on the **Print** button on the menu bar at the bottom of the window.
4. The House Manager will ask you whether you want to print all the records in the list or only the highlighted ones. Click on the radio button beside “Highlighted Records Only” and click **OK**.
5. Now you have a choice of which report to print. Click on the radio button beside “List of Chapters” and click **OK**.

6. The next window will be your printing window. This window will vary according to the model of your printer. If you need assistance with these options, please refer to the manual that came with your printer.

Exiting the Chapters Window

To exit the Chapters window, click on the `Close` button in the bottom right of the window or click in the window's close box. This will return you to the launching station.

Members

Finding, Entering, and Modifying Member Information

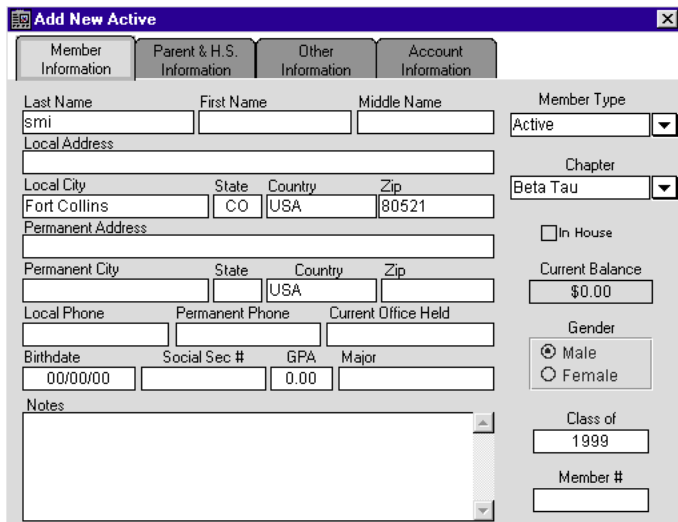
Find or Enter a Member

Let's say that you wanted to work with a particular member's information. You might want to enter a new member or you might want to edit an existing member's record.

The House Manager has one window to find and enter member information. This feature prevents you from creating two records for the same member by accident. As you can imagine, duplicate records can wreak havoc on your book-keeping.

Follow these simple steps every time you want to gain access to member information:

1. Choose **Enter New Member** from the **Members** button on the launching station. This window will open:

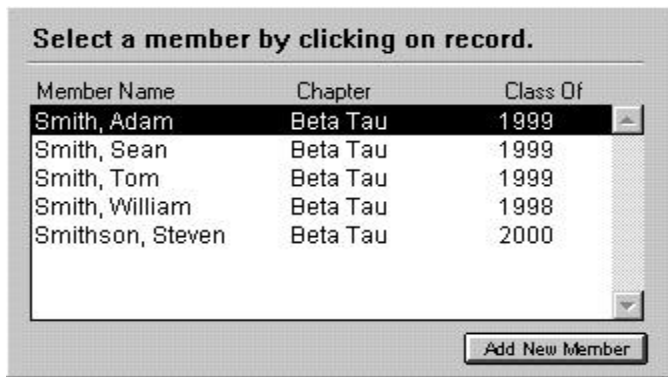


The screenshot shows a software window titled "Add New Active" with a purple header bar. Below the header are four tabs: "Member Information", "Parent & H.S. Information", "Other Information", and "Account Information". The "Member Information" tab is selected. The form contains the following fields and controls:

- Last Name: smi
- First Name: [empty]
- Middle Name: [empty]
- Member Type: Active (dropdown)
- Local Address: [empty]
- Chapter: Beta Tau (dropdown)
- Local City: Fort Collins
- State: CO
- Country: USA
- Zip: 80521
- Permanent Address: [empty]
- In House
- Permanent City: [empty]
- State: [empty]
- Country: USA
- Zip: [empty]
- Current Balance: \$0.00
- Local Phone: [empty]
- Permanent Phone: [empty]
- Current Office Held: [empty]
- Gender: Male, Female
- Birthdate: 00/00/00
- Social Sec #: [empty]
- GPA: 0.00
- Major: [empty]
- Class of: 1999
- Member #: [empty]
- Notes: [empty text area]

2. Type the member's last name into the Last Name field and press the TAB key.

The House Manager automatically searches for all the members with that last name and displays the results in a small window.



Note: *Here the user typed "smi" into the last name field. The House Manager searched for everything **beginning** with "smi". Entering part of a name is a feature that is helpful if you aren't sure of the exact spelling.*

3. If you see the member listed, click once on the member's name to display the record.

or...

If you don't see the member's name listed, click on the Add New Member button.

The Member Information Page

Using the Tabbed Member Screen

There are four pages of information about each member. You can flip from page to page by clicking on one of the four tabs at the top of the window. The first page is called

Member Information. This page displays personal information for the selected member.

Enter the member's information in each field. You can move from field to field by pressing the TAB key and return to a previous field by pressing Shift+TAB. You may also click on any field to enter information directly.

The information to be added for each member is self-explanatory, with these few exceptions:

Local and Permanent Addresses

Each member record has a section for a local address and a permanent address, since students often move around a lot. The local address would be the current dwelling of the student, while the permanent address would be the student's home.

In House Address

There is a check box on the right-hand side of the screen labeled **In House**. Click on this button if the member lives in the fraternity or sorority house. The house address will automatically fill in the local address fields.

Member Type

On the right side of the dialog box, there is a drop-down box for member type. Clicking on this box will display a list of defined member types. Simply click on the appropriate type to select it for the member you are entering.

Chapter

On the right side of the dialog box there is a drop-down box for Chapter. Clicking on this will display a choose-list of defined chapter names. Simply click on the appropriate name to select it for this member.

Current Balance

This amount is calculated automatically by The House Manager so that you can instantly see if this member's payments are up to date.

Parent and High School Information

The House Manager can store information about each member's parents, their addresses, and the member's high school information.

The second tab will select the **Parent and High School Information** page. Fill in the information suggested by each field. You may leave a field blank, if you wish.

Copying Father Information to Mother

If the father's information is the same as the mother's you may simply enter the father's information and click on *Copy to Mother*. All relevant fields will be copied and moved over to the mother's side of the dialog box.

Modify Steven Smithson [X]

Member Information Parent & H.S. Information Other Information Account Information

Father's Information

First Name: Laurence Last Name: Smithson

Address Info: Copy to Mother

USA

College Name

Greek Organization

Occupation

Mother's Information

First Name: Last Name:

Address Info

College Name

Greek Organization

Occupation

High School Information

High School Name

GPA: 0.00

Other HS Notes

Other Information

The House Manager stores a variety of information about each member that is helpful in fraternity administration. The Other Information tab on the member information dialog box handles all of this.

The third tab selects the Other Information dialog box:

Modify Steven Smithson [X]

Member Information Parent & H.S. Information Other Information Account Information

Email Addresses

E-Mail Address
smithson@webstar.com

Offices Held

Office Title	Start Date	End Date

Courses Taken

Course ID	Course Name	Credits

Main Email Address

Entering the Member's Email Information

The left half of the dialog box contains information about the member's Email accounts. Since a member may have more than one Email account, there is a scrollable list of all email accounts for this member. Below that, there is a window containing the member's main email address.

Add Email Address

If you click on the Add Email button, the following dialog box will open:

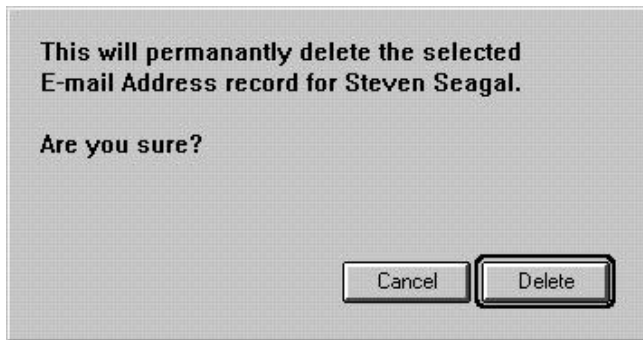


The image shows a dialog box titled "Add email address for". Below the title is a horizontal line, followed by the label "Email Address" and a text input field. At the bottom of the dialog box, there are three buttons: "Save & Close", "Cancel", and "Save & Repeat".

Here, you can type in an email address for this member. Once you have added the address, you can click on **Save and Repeat** to add another email address, **Save** to save the address and close the dialog box, or **Cancel** to close the dialog box without saving the new email address.

Delete Email Address

If you have selected an email address from the list box, you may press the **Delete** button to remove it from the list. This dialog will appear:



Press **Delete** on this dialog to carry out the operation and delete the address, or **Cancel** if you change your mind.

Modifying Email Information

If you have an email address selected (select an address by clicking on it in the list box), the **Ad** button will change to **Edit**. Clicking the **Edit** button will allow you to change the information for this email address.

Main Email Address

There is a box on the lower left corner of the main dialog labeled **Main Email Address**. Above that are two buttons labeled **Select** and **Delete**. If you have highlighted an email address in the list box above, clicking on **Select** will make that address the main email address. Clicking on **Delete** will clear the main email address field.

Entering Office Held Information

Each member may hold several offices within the fraternity. The upper right corner of the Other Information dialog box contains this information. The list box in this corner will display the office title and the start and ending dates of the office held.

Add Office

If you click on the Add button above the offices held list, this dialog box will pop up:

Add Office Held for

Office Title	Term Elected	Start Date	End Date
<input type="text"/>	<input type="text"/>	00/00/00	00/00/00

The first two fields in the dialog box are drop-down lists. By clicking on the button to the left of the field, you can drop down a list of all defined Office Titles or Terms. Click on the desired office or term to select it.

Adding Dates

When adding an office held, you must enter the start date and end date for the office. When entering dates, use the format MMDDYY. For example, 042375 would be April 23, 1975. You do not need to enter slashes, spaces or any other punctuation.

Saving Office Information

After you have finished filling in the fields on the dialog box, you can click on *Save and Close* to return to the main dialog box, *Save and Repeat* to save the Office and start another blank entry field (for entering multiple offices), or *Cancel* to exit without saving changes to the member's office list.

Deleting Office Information

If you have selected an office for the member, you can click on the **Delete** button to remove it. An alert box will pop up asking you to verify the deletion. If you wish to continue, click on **Delete**. Otherwise, click **Cancel**.

Adding Course Information

The bottom right portion of the **Other Information** dialog box contains a list-box displaying information about courses taken by the member. If you click on **Add** above the course list, a dialog box will be displayed.

The first field of the dialog box is a drop-down list of terms you have previously defined in **The House Manager**. The next field is the course ID, followed by the course name and the number of credits. Click on each field to select it, or use the **TAB** key to move from one field to the next.

Add Course for

<input type="checkbox"/>	Term	Course ID	Course Name	Credits
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>
Instructor		Room	Scheduled	
<input type="text"/>		<input type="text"/>	<input type="text"/>	
Member Comments				
<input type="text"/>				
Save & Close		Cancel	Save & Repeat	

On the next line, there are fields for Instructor, Room where the course is held, and the time scheduled for each course.

Finally, there is a Member Comments text box. If you select it, you may type in any number of comments.

Saving Course Information

After you have finished filling in the fields on the dialog box, you can click on **Save and Close** to return to the main dialog box, **Save and Repeat** to save the Course Information and start another blank entry field (for entering multiple courses), or **Cancel** to exit without saving changes to the member's course list.

Entering Account Information

Each member of your fraternity has an account stored in The House Manager. This account will track all charges to the member, all payments, and schedules for payments.

If you click on the fourth tab, the `Account Information` dialog will be selected, as shown below.

This screen contains financial information pertaining to the selected member. The main list-box in the middle of the screen shows the current member's credits and debits for the current term as well as descriptions of all charges and payments. The dialog box also has a field showing the member's current balance for the term, and any outstanding balances from previous terms.

Modify Steven Smithson [X]

Member Information Parent & H.S. Information Other Information Account Information

Member Transactions for Fall 1997 Only

Balance from Previous Terms 0.00

Term	Date	Reason	Amount	Pay Form	Notes
Fall 1997	08/04/97	Dues	\$413.00		For Fall 1997
Fall 1997	06/15/97	Payment	-\$295.00	Check	

Charges from Fall 1997 118.00

Current Balance 118.00

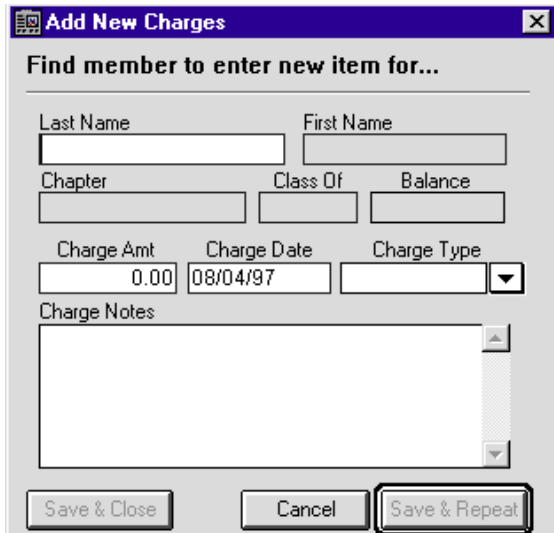
Sched Payments	Payments Recvd	Payments Remaining	Remaining Pymnt Amt
1	1	1	118.00

There is a payment information box below the main list showing the number of payments set up for this member, how many have been made, and how many are outstanding. The first field in the box is an editable field labeled *Sched Payments*. You may click on this field to change the number of scheduled payments for this member. The other fields in the box are generated fields that will show you the number of payments received, the number of payments remaining, and the total amount remaining. When you add a new payment (see below), these fields will be automatically updated.

The *Show All Transactns* button allows you to toggle the main list between transactions for the current term only, or for all transactions. When you click on this button, the red title at the top of the dialog will change from *Member Transactions For Current Term Only* to *All Member Transactions*, and the button text will change to *Show Cur Transactns*.

Adding Charges for a Member

If you click on the Add Charge button on this screen, the following window will open:



The screenshot shows a dialog box titled "Add New Charges" with a close button (X) in the top right corner. The dialog box contains the following fields and controls:

- Find member to enter new item for...** (Section header)
- Last Name:
- First Name:
- Chapter:
- Class Of:
- Balance:
- Charge Amt:
- Charge Date:
- Charge Type:
- Charge Notes:
- Buttons:

There are four editable fields on this menu: Charge Amount, Charge Date, Charge Type, and Charge Notes. Enter the information requested. You may leave a field blank, if you wish.

To enter a charge:

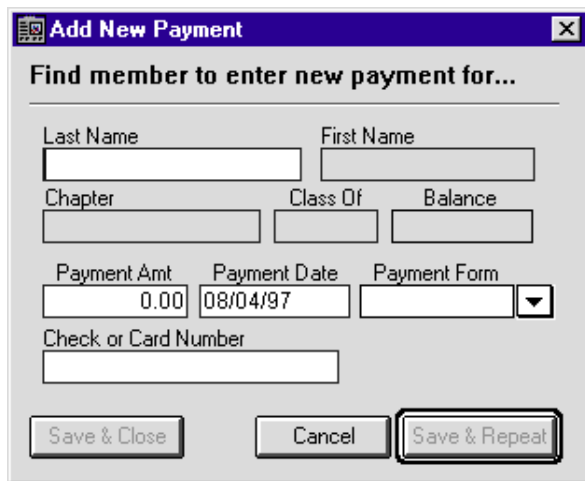
1. Click on the Charge Amount field and enter the dollar value of the charge.
2. Click on the Charge Date field and enter the date in MMDDYY format.
3. Click on the Charge Type field, and enter a charge type. This field also has a drop-down list of pre-defined charge types. You can click on the drop-down selector, then click on one of the pre-defined types.
4. Enter any additional information about this charge in the Charge Notes field. Doing so is optional and the information will be displayed for reference purposes only.
5. Click on the Save and Close button to return to the member's account screen, or Save and Repeat to save this charge and enter another. If you wish to abort the entry process, click on Cancel.

Note: *You can move from field to field by using the TAB key, and move to the previous field by pressing Shift+Tab.*

Note: *If you need to add the same charge to many members, use the Add Fee button to add them all at one. This feature is documented in Chapter 7.*

Adding Payments for a Member

If you want to add a payment for a member, click on the Add Payments button. The following window will open:



The screenshot shows a dialog box titled "Add New Payment" with a close button (X) in the top right corner. The main heading inside the dialog is "Find member to enter new payment for...". Below this heading are several input fields:

- Last Name:
- First Name:
- Chapter:
- Class Of:
- Balance:
- Payment Amt:
- Payment Date:
- Payment Form:
- Check or Card Number:

At the bottom of the dialog, there are three buttons: "Save & Close", "Cancel", and "Save & Repeat".

There are four editable fields on this menu: Payment Amt, Payment Date, Payment Form, and Check or Card Number. Enter your information in these fields.

To enter a payment :

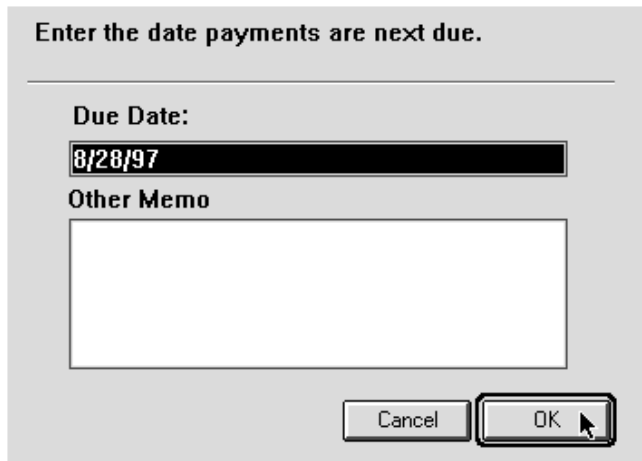
1. Click on the Payment Amt field and enter the dollar value of the payment.
2. Click on the Payment Date field and enter the date in **MMDDYY** format.
3. Click on the Payment Form field, and enter a Payment Form. This field also has a drop-down list of pre-defined payment forms. If you like, you can click on the drop-down selector and click on one of the pre-defined forms.
4. If the payment is by check, enter the check number in the Check or Card Number field. If the payment is by credit card, enter the card number here.
5. Click on the Save and Close button to return to the member's account screen, or Save and Repeat to save this payment and enter another. If you wish to abort the entry process, click on Cancel.

Note: *You can move from field to field by using the TAB key, and move to the previous field by pressing Shift+Tab.*

Print Statements for Members

The Print Statement button will allow you to print a statement for the currently selected member.

1. Click on the Print Statement button. This window will open:



Enter the date payments are next due.

Due Date:
8/28/97

Other Memo

Cancel OK

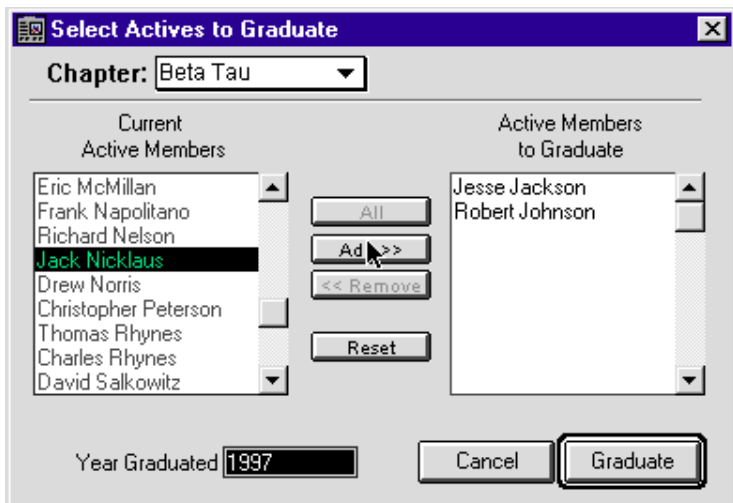
2. Enter the due date of the payment in MMDDYY format.
3. The Other Memo box provides an place for you to enter a note to this member on this statement. You can also enter a general note to appear on everyone's statement. Filling in this box is optional.
4. Now click OK, and you will see a standard printer dialog box from which you can send a statement to your system's printer.

Graduate Actives

When a current member graduates, you will want to move him from active status to alumni status. You do that with the Graduate Actives function.

Select Graduate Actives from the Members menu. The window shown below will open up on your screen.

At the top of this window is a drop-down list showing all of the chapters available (if you have multi-chapter support). Clicking on this will drop down a list of all chapters. You can click on one to select it.



The rest of the dialog box is divided into two halves. The left half shows all current active members. The right half shows all the members that you have selected to graduate. You can move members from one side to the other by using the Add and Remove buttons found between

the two panes. The All button will move all members from one side to the other, and the Reset button will move them back again.

Once you selected all the members you wish, enter the year of graduation in the field on the lower left of the dialog (it will default to the current year), and then click Graduate.

If you wish to abort this procedure, click Cancel at any time.

To Graduate a Member:

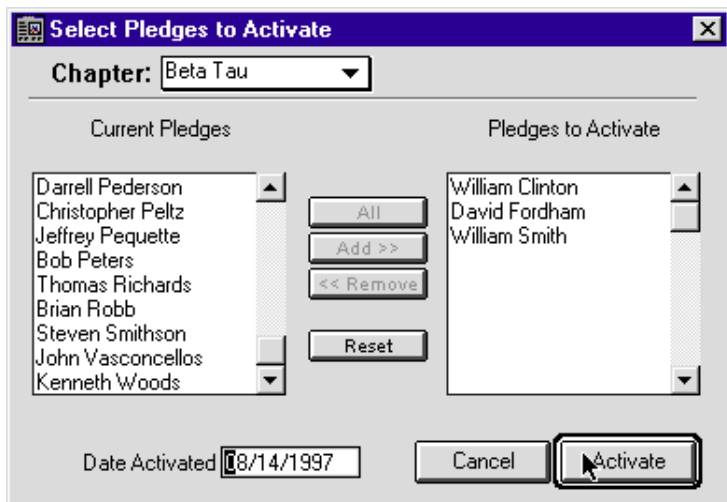
1. Scroll through the list of members in the left-hand pane of the dialog box.
2. Click on the member to highlight the member.
3. Click on Add to move the member to the right-hand pane.
4. Repeat with each member that you wish to graduate, or click on All to select all members.

5. Click on the date field and enter the year of graduation (or use the default).
6. Click on `Graduate` to complete the process.

Activate Pledges

When members have gone through the pledge process, you will want to activate them to active member status. You do this through the `Activate Pledges` menu option.

When you click on `Activate Pledges` the following window will be displayed:



At the top of this dialog box is a drop-down list showing all of the chapters available (if you have multi-chapter support). Clicking on this will drop down a list of all chapters. You can click on one to select it.

The rest of the dialog box is divided into two halves. The left half shows all current pledges. The right half shows all the pledges that you have selected to activate. You can move pledges from one side to the other by using the `Add` and `Remove` buttons found between the two panes. The `All` button will move all pledges from one side to the other, and the `Reset` button will move them back again.

Once you selected all the pledges you wish, enter the date of activation in the field on the lower left of the dialog (it will default to the current date), and then click `Activate`.

If you wish to abort this procedure, click `Cancel` at any time.

To Activate a Pledge:

1. Scroll through the list of members in the left-hand pane of the dialog box.
2. Click on the pledge to highlight the pledge.
3. Click on **Add** to move the pledge to the right hand pane.
4. Repeat with each pledge you wish to activate, or click on **All** to select all pledges.
5. Click on the date field and enter the date of activation (or use the default).
6. Click on **Activate** to complete the process.

Billing

Creating Your Chapter Budgets and Statements

Once you have entered your chapter and member information, you need to create a budget. Your budget will help you manage your chapter's income and expenses effectively. The House Manager makes budgeting a snap.

Creating a Budget

From the launching station, click on the **Billing** button and select **Add Budget**. (You may also choose **Add New Budget** from the **Startup** menu, or **Add New Budget** from the **Billing** menu.) This window will open:

Add New Budget
X

Chapter Name: **Beta Tau**

Term: In House %: Bad Debt %: Members: In House: Out of House: Pledges:

Fixed Expenses

House Expenses

	Sort by...
	Item

Tot House \$0

General Expenses

	Sort by...
	Item

Tot Gen \$0

Total Fixed Exp: \$0

Variable Expenses

Item	Qty	Cost	Total

Total Variable Exp: \$0

Expense Breakdown

Fixed Exp : \$0 { House Exp: \$0
 Var Exp : \$0 { Gen Exp: \$0
 Bad Debt : \$0 = Bad Debt % × (Fixed + Var)
 Total : \$0

Use Suggested Amounts

Revenues

	Members	Term Fees	Revenue
In House	33	\$0	\$0
Out of House	10	\$0	\$0
Pledges	19	\$0	\$0
Total	62	Total	\$0

Fee Breakdown

In House	Gen Mem.	Out of
\$0	\$0	\$0
<input right;"="" text-align:="" type="button" value="Other Revenues:</td> <td style="/> \$ 0.00		
Fee Revenues:		\$ 0.00
Total Expenses:		\$ 0.00
Budget Surplus		\$ 0.00

Here you enter expenses for your house and your chapter. The House Manager calculates your revenue based on your membership information and then displays the surplus or shortfall for your budget.

The House Manager fills in your chapter's name automatically. The House Manager also fills in the information for **In House %**, **Members in House**, **Out of House** and **Pledges** from the **Members** information. You may edit those numbers, if you wish, by entering new values over the values shown.

Bad Debt

The Bad Debt % is the percentage of revenue that has typically gone uncollected in the past. By default the percentage is set to 3; however, you may change it if you wish.

Term

Enter the term for this budget. For example "Fall 1997." This will be the name of your budget.

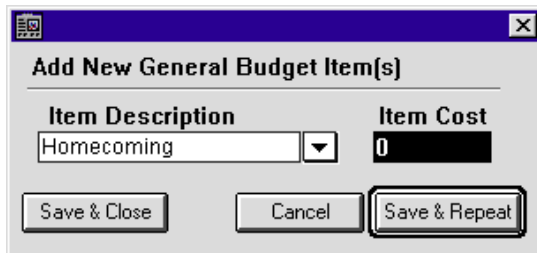
Expenses

Fixed Expenses (House and General) are expenses that your organization incurs regardless of membership numbers. Civic taxes on a house would be an example.

Variable Expenses are expenses that increase and decrease according to the number of members. An example would be the cost of mailouts.

Add an Expense

To add an expense, click on the Add Item button directly above the appropriate list of expenses. The window below will open.



The image shows a dialog box titled "Add New General Budget Item(s)". It has a standard Windows-style title bar with a minimize button, a maximize button, and a close button. The dialog box contains two input fields: "Item Description" and "Item Cost". The "Item Description" field is a dropdown menu with "Homecoming" selected. The "Item Cost" field is a text box containing the number "0". At the bottom of the dialog box, there are three buttons: "Save & Close", "Cancel", and "Save & Repeat". The "Save & Repeat" button is highlighted with a thick border.

Type in the description of your item, and press **Tab**. If the item has not been entered before, you will be asked if you would like to add it. Added items are remembered in a pop-up list for you to use the next time you enter that item — your budget for next term, for example.

In the future, you may choose from the list you have made by clicking on the down-arrow button on the right. Clicking the arrow brings up a list. Clicking on any item in the list enters it onto your budget page.

The **Save & Close** button closes the **Add New Item** window after adding the new item to the list.

If you are entering a list of expenses, use the **Save & Repeat** button. Clicking this button leaves the **Add New Item** window open after adding the new item to the list so that you may enter another directly.

Click **Cancel** to leave the expenses unchanged and close the window.

Each time you add or modify an expense, The House Manager updates the totals for the expense area you have modified, the total expenses, and the budget surplus.

Delete an Expense

Select any item to be deleted, and click on the **Delete Item** button. Totals for the expense area you have deleted, the total expenses, and the budget surplus are all updated automatically.

Sort Expenses

Your lists of expenses may be sorted by item, or by cost. Simply click on the **Sort By** button to change the sort order.

Expense Breakdown

Expenses are summarized in the **Expense Breakdown** area. Amounts are updated automatically as expenses are added.

Revenues

Use Suggested Amounts

Click in the **Use Suggested Amounts** checkbox to have The House Manager automatically calculate what your house needs to charge its members in order to balance the budget.

If you leave the **Use Suggested Amounts** checkbox unchecked, you may enter fees manually, and The House Manager will determine the budget surplus (or shortfall) based on member and expense information already entered.

Other Revenue

Click on the **Other Revenues** button to enter sources of revenue other than fees, such as a car wash. Clicking the button brings up this screen:

Add/Edit Other Revenue Items

Other Revenue Budget Items

Revenue Type	Amount
Car Wash	\$250.00

Shinorama 3000

Add Update Delete Close

Enter the item name in the bottom left, use the TAB key to move to the next field where you can enter the expected revenue amount, then click the Add button.

Update or Modify Other Revenue Items

To update an item:

1. Click on the item to select it
2. Modify the information for that revenue item.
3. Click on the Update button.

Delete an Other Revenue Item

To delete an item

1. Click on it to select it
2. Click on the Delete button.

When you click on the `Close` button, the other revenues are tallied and included in the budget surplus calculation.

Print

Click this button to print out your budget for the term.

List Budgets

Selecting `List Budgets` from the `Budgets` menu allows you to examine budgets that have been saved. When you select this item, you will get a screen like the picture on the following page

This window is useful for searching and generating reports. For more information on these functions, please refer to Chapter 7.

Budgets: 1 of 1 records

Closed	Budget Term	Chapter Name	In House	Out of House	Pledge Fee	Total Exp	Bad Debt
<input type="checkbox"/>	Fall 1997	Beta Tau	\$963	\$412	\$412	\$56,428	3 %

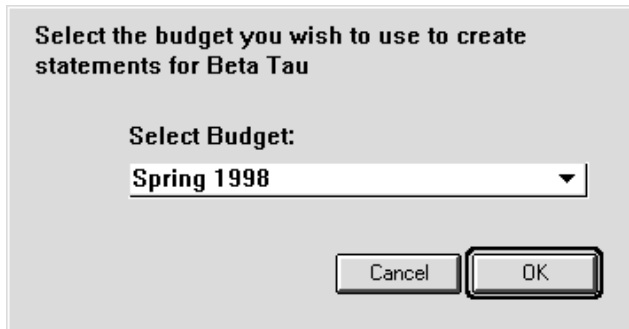
Create Statements

The House Manager can generate account statements for your members quickly, easily and reliably.

Create Statements For Your Membership:

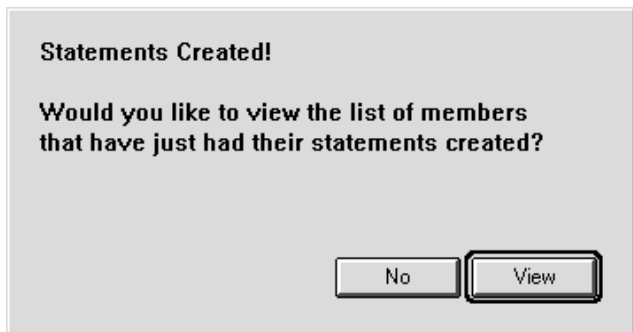
Select Create Statements from the Billing button on the launching station.

Note: *The House Manager bases your statements on budget information. You will not be able to generate statements if you haven't created a budget for your chapter. If there is one budget, The House Manager will automatically choose that budget. If there are several budgets, The House Manager will ask you to choose one:*



Use the pull-down list to choose which budget will be the basis for your statements and then click OK.

It will take a few moments to process all the member statements. When The House Manager is done, it will ask you this question:



Click **No** if you would like to view or print the member statements at another time and return to the launching station, or click **View** if you would like to view or print the member statements immediately.

Viewing and Printing Member Statements

If you have multi-chapter support, you may change the chapter by clicking on the pull-down menu in the upper left.

The pull-down menu below the list of members permits you to choose which group of members' statements you wish to view.

Click on a member from the scrolling window on the left to view that member's statement. Note that the title has changed to indicate whose statement is being displayed.

When a member has been selected from the scrolling list on the left, the Add Charge button and the Add Payment button become active

Member Statements X

Beta Tau ▼

Billing Statement for Scott Johnson

All Member Transactions

Balance from Previous Terms 0.00

Term	Date	Reason	Amount	Pay Form	Notes
Fall 1997	08/04/97	Dues	\$413		For Fall 1997
Fall 1997	06/08/97	Payment	-\$295	Check	

Charges from Fall 1997 118.00

Current Balance 118.00

Sched Payments	Payments Recvd	Payments Remaining	Remaining Pymnt Amt
3	1	2	59.00

Enter a Charge for a Selected Member

1. Click on the **Add Charge** button. This window will open:

The screenshot shows a dialog box titled "Enter New Charge" with a close button (X) in the top right corner. The main heading inside the dialog is "Enter new item for Scott Johnson".

The form contains the following fields:

- Last Name: Johnson
- First Name: Scott
- Chapter: Beta Tau
- Class Of: 1996
- Balance: 118.00
- Charge Amt: 0 (highlighted in black)
- Charge Date: 08/04/97
- Charge Type: (empty dropdown menu)
- Charge Notes: (empty text area)

At the bottom of the dialog are three buttons: "Save & Repeat", "Cancel", and "Save & Close".

2. The House Manager has already filled in the selected member's information, so you only have to enter the charge amount in the space for it, in dollars and cents.

3. Enter the type of charge from the pull-down menu on the right.

Note: *If the reason is not in the list, go to Fixed Expense Items (in the previous screen) and click on the Add button.*

4. Enter the item in the Name field.
5. Click the Save & Repeat button if you have several items to enter, or click the Save & Close button to add this item alone.

After you add a new item to the list, the Save & Close button closes the Add Charge window, but the Save & Repeat button leaves the Add Charge window open to add new items to the list. Click Cancel to leave the new charges unchanged, and close the window.

Add a Payment for the Selected Member

To add a payment, click the Add Payment button. This window will open:

The screenshot shows a dialog box titled "Enter New Payment" with a close button (X) in the top right corner. The main heading is "Enter payment for Scott Johnson". The form contains the following fields:

Last Name	Johnson	First Name	Scott		
Chapter	Beta Tau	Class Of	1996	Balance	118.00
Payment Amt	0	Payment Date	08/04/97	Payment Form	[Pull-down menu]
Check or Card Number					
[Empty text box]					

At the bottom of the dialog box are three buttons: "Save & Repeat", "Cancel", and "Save & Close".

Information for this member has already been entered. Enter the payment amount in the space for it, in dollars and cents. Enter the type of payment (check, cash, credit-card) from the pull-down menu on the right.

The **Save & Close** button closes the Add Payment window after adding the new payment to the list. the **Save & Repeat** button leaves the Add Payment window open after adding the new item to the list.

Click **Cancel** to leave the new payments unchanged, and close the window.

Print Member Statements

To print a statement for this member:

1. Click on the **Print Statement** button.
2. Enter the payment due-date in MMDDYY format.
3. Click **OK** to print the statement.

Show Cur Trnsactns Button

If you click on the Show Cur Trnsactns button to change the display of transactions from “all” to “current”. You can click on this same button to switch back to showing all transactions.

Sched Payments Field

Your organization can choose to have fees paid by installments. To do so, enter the number of installments in the Sched Payments field. The House Manager automatically calculates the payment amounts, and keeps track of how many payments have been made.

Done Button

Click on Done to close the statements window.

Receive Payment

When you have a stack of payments to enter, use the Receive Payment function to enter them all quickly and accurately.

1. Select Receive Payments from the Billing button on the launching station. The window displayed below will open.
2. Type in the member's last name and press the TAB key. The House Manager will search for all members with that last name, and display the results.
3. Select the member by clicking on the appropriate entry. The House Manager fills that member's information into the payment window automatically.

Add New Payment [X]

Find member to enter new payment for...

Last Name First Name

Chapter Class Of Balance

Payment Amt Payment Date Payment Form

Check or Card Number

4. As with many other windows in The House Manager, there are three ways to close this window: you can **Cancel**, losing all changes, **Save and Repeat**, which saves the check and leaves the dialog open to write another, or **Save and Close**, which saves the information and returns to the launching station.

Add New Fee / Charge

You can use the Add New Fee / Charge function to enter billing information quickly for your membership.

1. Click on the **Billing** button on the launching station and select **Add New Fee / Charge**.
2. Type in the member's last name and press the **TAB** key. The House Manager will search for all members with that last name, and display the results.
3. Select the member by clicking on the appropriate entry.

The House Manager fills that member's information into the payment window automatically.

4. As with many other windows in The House Manager, there are three ways to close this window: you can **Cancel**, losing all changes, **Save and Repeat**, which saves the check and leaves the dialog open to write another, or **Save and Close**, which saves the information and returns to the launching station.

Checkbook

Managing Your Chapter's Checkbook with The House Manager

The House Manager's Checkbook functions will allow you to manage all accounts related to your chapter. This has several advantages for you:

- The House Manager will never make a math error,
- The House Manager will keep all your transactions in chronological order
- All transactions will have a category, making it easy to track income and expenses.
- If you change a transaction later on, your balances will be updated automatically.

Open Check Register

The check register is The House Manager's record of your checking account. When you record a check that you have written by clicking on the **Write Check** button, it will be recorded in the check register.

Choose **Open Check Register** from the **Checkbook** button on the launching station. The following window will open:

Check Register [X]

Beta Tau [v]
 First National Checking for the Beta Tau chapter.

New Acct [b] Close Acct [b]

First National Checking [v]

Delete [b] Edit [b] Void [b] Write Check [b] Make Deposit [b]

DATE	NUMBER	DESCRIPTION	PAYMENT	✓	DEPOSIT
		MEMO			
					CATEGORY
6/22	14	Alpha Omicron Pi Beta Tau House Corp	5,000.00	<input type="checkbox"/>	0.00
1997		Mortgage			
6/22	Deposit	Deposit Funds	0.00	<input type="checkbox"/>	2,682.00
1997		Deposit			
6/22	Deposit	Deposit Funds	0.00	<input type="checkbox"/>	6,562.00
1997		Deposit			
6/15	Deposit	Deposit Funds	0.00	<input type="checkbox"/>	75.00
1997		Deposit			
6/15	12	David Fordham	500.00	<input type="checkbox"/>	0.00
1997		Homecoming			
6/15	Deposit	Deposit Funds	0.00	<input type="checkbox"/>	295.00
1997		Deposit			
6/15	Deposit	Deposit Funds	0.00	<input type="checkbox"/>	818.00
1997		Deposit			
6/15	Deposit	Deposit Funds	0.00	<input type="checkbox"/>	295.00
1997		Deposit			
6/15	Deposit	Deposit Funds	0.00	<input type="checkbox"/>	295.00
1997		Deposit			

Account Balance \$6,939.95

The main checkbook register has the following fields:

Date

This is the date that the transaction was entered into The House Manager

Number

The check number for this transaction. If the transaction is a deposit, the word Deposit will be displayed here instead.

Description

The description is broken into two parts: memo and category.

Memo

The contents of the TO line on your check, or the FROM line in the deposit.

Category

A defined category for the transaction, selected from the category drop-down list either on the check or in the deposit window.

Payment

The amount of the check, or blank if the transaction is a deposit.

Checkmark

The checkmark will be displayed when this transaction has been reconciled.

Deposit

The amount of the deposit, or blank if the transaction is a check.

Adding New Accounts

The House Manager will allow you to maintain multiple checking accounts.

If your chapter has more than one account, select the `New Acct` button. The window below will be displayed:

Enter New Bank Account Information

Chapter	Account Number
Beta Tau	
Account Name	
Date Opened	Opening Balance
07/14/97	0.00
Account Notes	

Cancel Save

Choose the chapter from the pull-down list, and fill in your account number and name. There is also space for your opening balance, and any notes you may wish to add (such as the type of account).

Writing Checks

To write a check, click on the Write Check button.

This window looks much like a normal paper check that you might write.

The House Manager will automatically fill in the check number and date for you.

At the bottom right of the check are two mandatory fields: Charge to Account and Term. Charge to Account is a drop-down list that will show all of the accounts that you have defined. By selecting one of these, you can make sure that each expense gets recorded to the proper category. The Term button works the same way and makes sure that the expenses for the term are recorded properly.

As with many other windows in The House Manager, there are three ways to close this window: you can Cancel, losing all changes, Save and Repeat, which saves the check and leaves the dialog open to write another, or Save and Close, which saves the information and returns to the launching station.

Alpha Omicron Pi Beta Tau
625 S Shields
Fort Collins, CO 80521

CHECK # 15
DATE 08/17/97

The University of
PAY TO THE ORDER OF

\$ 0.00

DOLLARS

MEMO

Chrg to Account Term

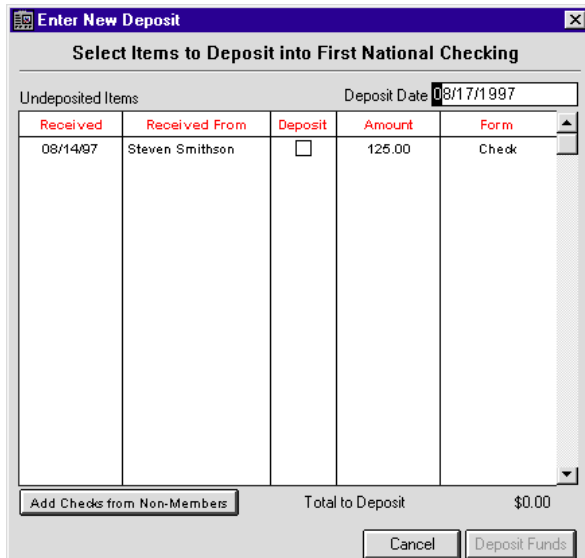
Save & Close Cancel Save & Repeat

1. Type in the name of the person to whom the check is payable.
2. Press TAB to move to the Amount field, and enter the amount.

3. Press **TAB** again. The amount will automatically be written on the line below.
4. Enter the particulars of the check in the **Memo** field.
5. Click on the **Charge to Account** drop-down list and choose an account.
6. The **term** field will automatically be filled with the current term. However, you may use the **Term** drop-down list to select a different term.
7. Press **Save and Close** to save your check and return to the previous menu, **Save and Repeat** to save your check and write another, or **Cancel** to abandon all changes and return to the previous screen.

Making Deposits

Click on the Make Deposit button, and the following window will open:



The screenshot shows a software window titled "Enter New Deposit" with a close button (X) in the top right corner. Below the title bar is a subtitle "Select Items to Deposit into First National Checking". The window contains a "Deposit Date" field with the value "08/17/1997". Below this is a table with the header "Undeposited Items". The table has five columns: "Received", "Received From", "Deposit", "Amount", and "Form". There is one row of data with the following values: "08/14/97" in the "Received" column, "Steven Smithson" in the "Received From" column, an unchecked checkbox in the "Deposit" column, "125.00" in the "Amount" column, and "Check" in the "Form" column. At the bottom of the window, there is a button labeled "Add Checks from Non-Members", a label "Total to Deposit" with the value "\$0.00", and two buttons labeled "Cancel" and "Deposit Funds".

Received	Received From	Deposit	Amount	Form
08/14/97	Steven Smithson	<input type="checkbox"/>	125.00	Check

Total to Deposit \$0.00

Buttons: Add Checks from Non-Members, Cancel, Deposit Funds

The main display on this dialog box will show all payment from members (added using the Add Payment button from the previous screen). If you have payments from non-members, click on the Add Checks from Non-Members button.

Deposit a Payment from a Non-Member

If you have a check written to your Chapter by a non-member, follow these steps to add it to your deposit:

1. Click on the Add Check from Non-Member Button. You will see the following window:

Enter new payment from non-member

Non-Member Name
Garth Brooks

Payment Amt Payment Date Payment Form
500.00 08/17/97 Check

Check or Card Number For Account
011 Alumni Donation

Memo

Save & Close Cancel Save & Repeat

You can click on any field to enter information, or use the TAB key to jump from field to field in order. There are two drop-down lists on this window: Payment Form and For Account. Payment Form is a drop-down list of various payment types (VISA, Check, etc). For Account is a drop-down list of all your account categories. It is necessary to choose an account category so The House Manager can properly track your finances.

1. Click on the Non-Member Name field. Type in the name of the person making the payment
2. Tab to the Payment Amount field and enter the dollar value of the payment.
3. Tab to the Payment Date field and enter the date (The House Manager will automatically fill in today's date – just tab past this field if you don't wish to change it.)
4. Click on the arrow beside the Payment Form drop-down list to see a list of all payment forms. Click on the correct one.
5. Click on the Check or Card Number field, and enter the correct value.
6. Click on the arrow beside the For Account drop-down list to see list of all defined accounts. Click on the correct one.
7. Click on the Memo field and enter any extra information you would like to store with this transaction.

8. Press **Save and Close** to save your check and return to the previous menu, **Save and Repeat** to save your check and write another, or **Cancel** to abandon all changes and return to the previous screen.

Review Your Deposit Items

The main deposit window should now show all payments from members and non-members. If you have payments from members that are not listed in this window, you need to enter them using the **Receive Payment** menu option . Click on **Cancel**, then select the **Receive Payment** menu option under the **Billing** menu.

Deposit the Funds

Once you have entered all of your undeposited items from **Non-Members**, you are ready to make a deposit. Click on the **Deposit Funds** button, and the payments will all be marked as deposited.

Edit a Check

If you need to edit a check register entry, follow these instructions:

1. Select a check register item by clicking on it once.
2. Click on Edit. You will see this window:

DATE	NUMBER	DESCRIPTION		PAYMENT	<input checked="" type="checkbox"/>	DEPOSIT
		MEMO	CATEGORY			
6/22 1997	14	Alpha Omicron Pi Housing Corporation	Mortgage	5,000.00	<input type="checkbox"/>	0.00

Memo	Category	Amount
	Mortgage	5,000.00

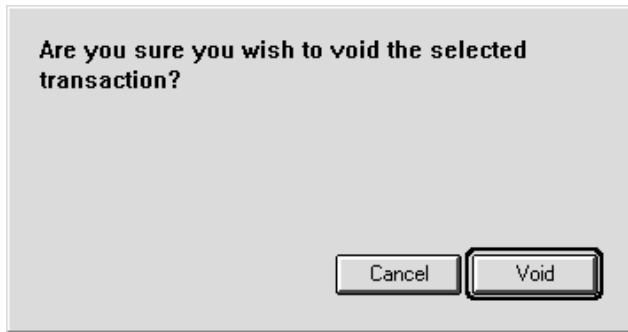
Buttons: Add Item, Del Item, Cancel, Save

3. Click in the field that wants correction and type in the new information.
4. When you have finished editing the check, click on **Save** to save the changes and close the window or click on **Cancel** to close the window without saving the changes.

Note: *Changes made here in the check registry will not be reflected in the member's statement.*

Voiding Checks

If you wish to void a check, click on the **Void** button on the check register. The House Manager will ask you to confirm your choice. If you continue, the checkmark box will be marked with an X indicating that the check has been voided.



Note: *Once you have voided a check, you will no longer be able to edit it.*

Reconcile Bank Account

When your bank statement arrives, you can reconcile it with your checkbook register in The House Manager.

Reconciling your account is simply a process that verifies that your records and the bank's records show the same amount of money in your account for a specific period.

Click on Reconcile from the Checkbook button on the launching station, and the following window will open:

Reconcile Bank Accounts

Account to Reconcile: **First National Checking** Opening Balance: **0**
Ending Balance: **0.00**

Service Charge: **0.00** Date: **08/17/97** Account: **Bank Service Chrg**
Interest Earned: **0.00** Date: **08/17/97** Account: **Interest Income**

Deposits & Other Credits

<input checked="" type="checkbox"/>	Date	Chk Num	Description	Memo	Amount
<input type="checkbox"/>	06/14/97		Opening Balance		2,415.66
<input type="checkbox"/>	06/15/97	Deposit	Deposit Funds		818.00
<input type="checkbox"/>	06/15/97	Deposit	Deposit Funds		295.00
<input type="checkbox"/>	06/15/97	Deposit	Deposit Funds		75.00

Checks & Other Payments

<input checked="" type="checkbox"/>	Date	Chk Num	Description	Memo	Amount
<input type="checkbox"/>	06/15/97	11	Alpha Omicron Pi Housing Corp		5,000.00
<input type="checkbox"/>	06/15/97	12	David Fordham		500.00
<input type="checkbox"/>	06/15/97	9	David Fordham		500.00
<input type="checkbox"/>	06/15/97	10	The Candleshop		25.71
<input type="checkbox"/>	06/22/97	14	Alpha Omicron Pi Housing Corp		5,000.00

0 Deposits and Other Credits 0.00 Ending Balance 0.00
0 Checks and Payments 0.00 Cleared Balance 0.00
Difference 0.00

Cancel **Done**

The first field is **Account To Reconcile**. If you have multiple bank accounts, click on the arrow beside the choose box and choose the correct account from the pop-up menu.

Now we're ready to start reconciling our bank account. Follow these steps:

1. From your bank statement, enter your opening and ending balance by clicking on those fields.
2. Enter any service charges or interest earned in the appropriate fields. The House Manager will fill in today's date and the suggested account for each item. You may change them if you wish.
3. Deposits and checks that have not been reconciled automatically appear in the two scrollable windows on the screen. Check off every item that has cleared your account by clicking in the box under the checkmark for that item.
4. Once you have done this, look at the **Ending Balance** and **Cleared Balance** fields. The **Ending Balance** is the balance shown on your bank statement, and the **Cleared Balance** is the sum of all reconciled checks and deposits. The difference between the two is shown below them, and should be zero. If it isn't, you are missing some

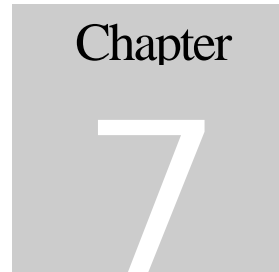
transactions.

Hint: The most common reconciliation error is to miss bank charges or accrued interest.

5. When you are finished, Click on Done. An alert box will pop up verifying that you have reconciled correctly and wish to continue. If your Difference balance is not zero, you should not continue because once you do you can not go back and edit reconciled items. Make sure that all items are correct before you lose the ability to edit them!

Searching

Working with Your Records



The House Manager has powerful searching and reporting capabilities that allow you to generate all kinds of reports. This chapter guides you through the steps you'll need to create just about any report you can imagine. The examples we are using here are taken from the Members file. Chances are good that you will be doing most of your reporting from the Members file, too; nevertheless, these techniques work exactly the same in the Budgets and Chapters files.

List Members

The List window lets you do several things:

- Find a record or records.
- Modify record information.
- Generate reports.
- Print labels.
- Delete records.

Click on the List Members button, and the following window will open:

Members: 71 of 71 records							
Member Name	Address	Phone Number	In House	Member Type	Chapter Name	Class of	
Roy Becker	211 West Hill Road	(970) 282-7467	<input type="checkbox"/>	Active	Beta Tau	1996	
Scott Bordenkirchen	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1996	
Crispen Bowen	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1996	
David Bronchochio	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1998	
Vincent Checchini	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1997	
Michael Ferris	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1997	
William Gates	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1997	
Andrew Grabacki	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1996	
Geoff Hamilton	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1996	
William Hearst	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1999	
Frank Hill	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1996	
Jeff Holt	211 Meldrum St	(970) 493-3451	<input type="checkbox"/>	Active	Beta Tau	1996	
Nelson Howe	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1997	
Andrew Insinga	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1997	
Jesse Jackson	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1996	
Gary Jaycox	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1997	
Floyd Jefferson	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1997	
Scott Johnson	211 Medrum St	(970) 493-3451	<input type="checkbox"/>	Active	Beta Tau	1996	
Jonathon Johnson	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1998	
George Johnson	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1996	
Robert Johnson	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1998	
Donald Kuchy	2435 S Shields	(970) 224-5400	<input checked="" type="checkbox"/>	Active	Beta Tau	1996	

Find... Search Sort Subset Show All Print Qk Rpt Delete Labels Add Fee Close

Record Selection

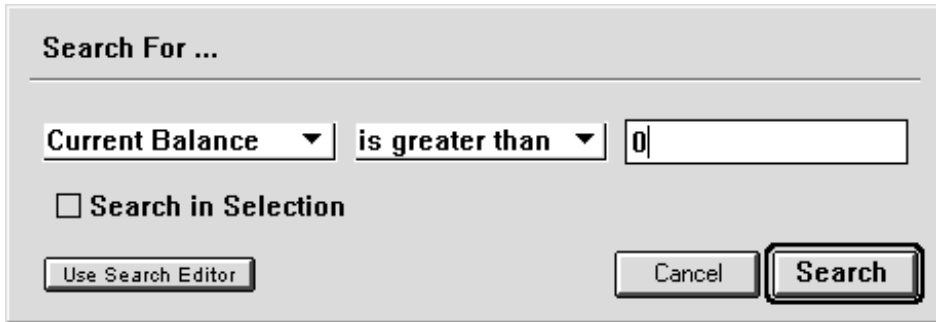
A “record selection” means the records that appear in the list window. While there may be a hundred records available, you may only have six listed. In that case your record selection would be six records. If all one hundred records were listed, your record selection would be one hundred records. When you first open the List Members window, all the records will be listed.

There may be times when you will want to limit your record selection. For example, if you were to print some labels, the labels would only be generated for every record in your selection, not every record in the file. The same principle applies to the Quick Reports: it will report only on the records in your selection.

One way to limit your selection is to search for the records you want.

Search Button

Clicking on the Search button in the bottom left-hand corner will open the Search For... layout.



Search For ...

Current Balance ▼ **is greater than** ▼ 0

Search in Selection

Use Search Editor **Cancel** **Search**

Note: *The Search For.. layout is available only from the Members window. On the Budget and Chapters windows the Search button will bring up the Search Editor, which is described in detail directly below.*

Let's say you wanted to search for all the members with an outstanding balance. You would follow these simple steps:

1. Select the **type** of member information you are searching from the pop-up list on the far left. In this example, you would choose Current Balance.
2. Select the **logical operator** for the search from the middle pop-up list. In this case, it's "is greater than".
3. Enter the **value** in the far right box.
4. Click on the Search button. The records that meet your search criteria will appear in the Members window.

Search Editor

If you are searching for Budget records or Chapter records, you will be using the Search Editor. There is also a Search Editor button on the Search For... layout for more complicated searches for member.

Opening the Search Editor

From the Budget or Chapter window, click on the Search button to bring up the Search Editor.

or....

If you are in the Members window, click on the Search button to bring up the Search For... layout, and there click on the Search Editor button.

Search Editor

[Redacted search criteria]

<p>← →</p> <p>FirstName</p> <p>MiddleName</p> <p>LastName</p>	<p>is equal to</p> <p>is not equal to</p> <p>is greater than</p> <p>is greater than or equal to</p>	<p><input type="radio"/> And</p> <p><input type="radio"/> Or</p> <p><input type="radio"/> Except</p>
---	---	--

Value | [Empty field]

Search in selection

Building a Search Argument

You need to tell The House Manager what you're searching for. This is called the **search argument**

To create your search argument:

1. Select the **field**. There is a list of fields in the lower left-hand corner. Click once on the field to select it, and it will appear in the search equation above.
2. Select an **operator**. The middle scroll box contains the operators.
3. Type in a **value** in the Value field.

Note: *the search engine is not case sensitive*

4. Click on the OK button to execute your search or click on the Cancel button to cancel your search and leave your selection of records as is.

Made a Mistake?

To edit a part of your search argument, click on the part and edit the value, or select the correct field, operator or conjunction.

To delete an entire line, select a part of the line, and choose `Cut` from the `Edit` menu.

To delete all the lines, select `Clear` from the `Edit` menu.

The Wildcard:

As an example, let's say you wanted to search for all the members with the first name 'Steve'. If you use the "contains" operator, you will get the members with that name, and you'll also get the members with that name as part of their name ('Steven', for instance.) Instead, you could use a wildcard in the search argument to specify that you only want the names that start with those letters.

The wildcard character, "@", tells the search engine to ignore everything that comes afterward.

Search Editor

FirstName is equal to Stev@

← →

← →

is equal to
is not equal to
is greater than
is greater than or equal to

And
 Or
 Except

Value Stev@

Search in selection

Save... Load... Cancel OK

Complex Search Argument

This example is a search argument with only one search criterion, but sometimes you may need several criteria. For example, if you wanted to find all the members in Colorado named “Steve”, that would require a complex search argument. To create a complex search argument:

1. Generate the first search argument using steps 1, 2 and 3 above. (Choose a **field** and an **operator**. Type in a **value**.)
2. Select a conjunction from the box on the far right.
3. Generate the next search argument using the same three steps.
4. If there will be another search argument, you will need to add another conjunction.
5. Click on OK to execute your search.

Search Editor

	State	is equal to	CO
And	FirstName	is equal to	Steve

← →

←	→	is equal to	▲
FirstName	▲	is not equal to	■
MiddleName	■	is greater than	▼
LastName	▼	is greater than or equal to	

And
 Or
 Except

Value

Search in selection

Saving and Loading Searches

If you have a complex search argument that you use frequently, you might save time by saving the search argument to file and then loading it when you need it.

To save a search argument:

Once you have built the argument, click on the `Save` button, and select a location for the new file.

To load a search argument:

When you bring up the Search Editor by clicking on the `Search` button, click on the `Load` button next and open your saved search argument.

Search in Selection

Every time you search, the search engine looks through all the records for that file. In most cases, that's exactly what you want to do. However, there may be a time when your search

result gives you too many records. To narrow down that selection without performing the same search again, click on the Search in Selection checkbox, and the search engine will only search the records you have listed.

Show Highlighted Records Only, or the Subset Button

Another way to limit your record selection is to use the Subset button or the Show Highlighted Records Only command from the Function menu. This function will make the records you have highlighted the only records in your selection.

1. To highlight more than one record at once, hold down the control/command key while you click on each record.

or

If there is a group of records that you would like to highlight, click on the first record, then hold down the shift key while you click on the last record.

2. Now click on the Subset button. or Select Show Highlighted Records Only from the Functions menu.

Now the records you have highlighted will be the only records in your selection.

Show All

After reducing your selection, you may want to have all the records in your selection again. If so, click on the **Show All** button or select **Show All Records** from the **Function** menu.

Modifying a Record

You can modify a listed record by double-clicking on it or by clicking once on it and selecting **Modify Record** from the **Functions** menu.

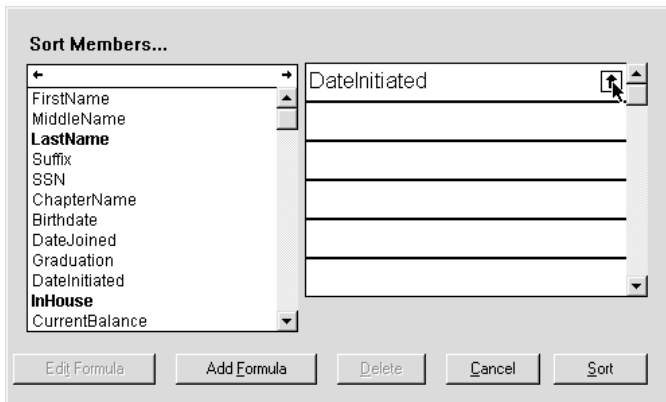
Deleting a Record

Note: *Once a record is deleted, it cannot be restored. Be cautious with the Delete command, and make sure you back up your data regularly.*

1. Click once on the record to highlight it.
2. Click on the Delete button, or select Delete Records from the Function menu. An alert will appear asking you if you're certain you want to delete the record.
3. Click the Delete button if you want to proceed, or click the Cancel button if you do not want to proceed.

Sort

You may want to put your selection of records in a certain order. To do this, click on the Sort button or select Sort from the Functions menu.



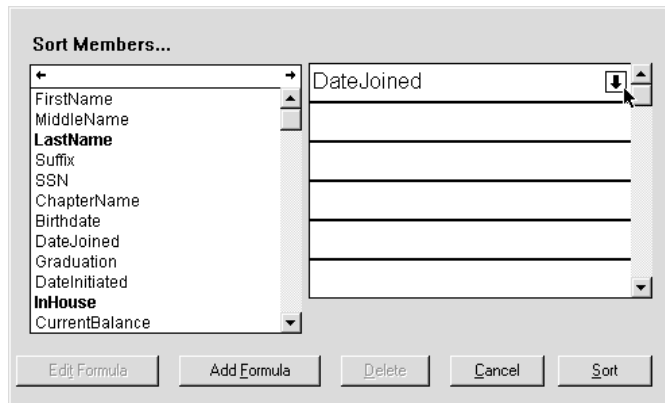
Here are instructions for a simple sort:

1. Click on the field by which you want to sort. That field will appear in the sort column.
2. Click on **OK**.

Your selection of records will be sorted in ascending order (i.e. from the smallest to the largest) by that field.

Descending Order:

You can have your records sorted in descending order by clicking on the arrow beside the sort field.



Many Sort Criteria:

If you have a large number of records that have the same value as your first sort criterion, you may want to add more sort criteria. For example, if you were to sort the members by their last name, you may have several Smiths. You could add FirstName to the sort criteria, and have all the Smiths sorted by their first names as well. Simply click on the second field and it will be added to the column.

Deleting a Sort Criterion

If you have added a sort field that you no longer want:

1. Click once on the field.
2. Click on the Delete button.

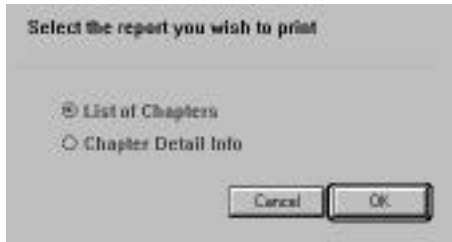
Add Formula and Edit Formula

These two buttons are for highly sophisticated sorting.

Print

You can print out your record selection by clicking on the Print button. It will give you a choice of printing the list (similar to what you see on the screen) or detailed information.

1. Generate your selection of records that you want printed using the method explained above.
2. Click on the Print button. The following dialog appears:



3. Select the type of printout you would like.

4. Click OK.

The next window will be your print menu, which will vary according to the type of printer you have. If you need help with this window, please consult your printer manual.

Samples of Printouts Available from the Print Button

Below is a list of the printouts that are available from the `Print` button. Click on the printout that interests you to view it.

Chapter Window:

List

Detail

Budget Window:

List

Detail

Member Window:

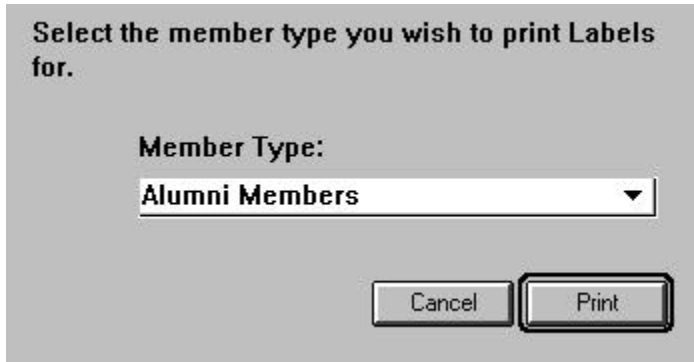
List

Individual Statement

Labels

You can print labels for your members quickly and easily with the Labels button.

1. Click on the Labels button.



Select the member type you wish to print Labels for.

Member Type:

Alumni Members ▼

Cancel Print

The image shows a grey dialog box with the text "Select the member type you wish to print Labels for." at the top. Below this is a label "Member Type:" followed by a white pull-down menu box containing the text "Alumni Members" and a small downward-pointing triangle. At the bottom of the dialog box are two buttons: "Cancel" on the left and "Print" on the right. The "Print" button has a double-line border, while the "Cancel" button has a single-line border.

2. From the pull-down list under Member Type, select the part of the membership for which you would like labels printed

3. Click OK.

The next window will be your print menu, which will vary according to the type of printer you have. If you need help with this window, please consult your printer manual.

Note: *This button is available only for the Members records.*

Find...

If you want to generate a selection of a certain type of members, save time by using the Find... button.

1. Press and hold the mouse button on the Find... pop-up.
2. Select the membership type you would like.
3. Release the mouse.

The House Manager will display all the members who belong to that type.

Note: *The Find button is available only for the Members records.*

Add Fee

When you have a fee that needs to be applied to several members, use the `Add Fee` button. It allows you to add the same fee to a group of selected members.

1. Select the members to whom you would like to add this fee. For Windows users, hold down the `control` key while clicking each member's record. Macintosh users hold down the `shift` key while clicking each member's record.
2. Click on the `Add Fee` button.
3. Enter the amount, type and description for the fee.
4. Click on `Apply` to apply the fee to each selected member record.
or
Click on `Cancel` to abandon this procedure.

You can view the successfully added fee in each member's account information.

Enter new item to charge to group...

Charge Amt: 50.00 Charge Date: 11/02/97 Charge Type: Adjustment ▼

Charge Notes:
 To Repair Damage To the House Caused By
 A Recent Storm.

Cancel Apply

Member Information		Parent & H.S. Information		Other Information		Account Information	
Member Transactions for Fall 1997 Only							
Add Charge		Add Payment		Balance from Previous Terms		0.00	
Term	Date	Reason	Amount	Pay Form	Notes		
Fall 1997	11/02/97	Adjustment	\$50.00		Repair Damage		
Fall 1997	06/22/97	Payment	-\$800.00	Check			
Fall 1997	06/01/97	In House Dues	\$1,046.00		For Fall 1997		

Reporting

*Generating Reports for Your Chapter
Using Ready-Made Reports or by
Building Your Own Custom Report*



Ready-Made Reports

There are several commonly-used reports that are available to you from the Reports button on the launching pad. Below are the simple instructions for generating these reports as well as examples of what is produced.

Phone List

To print a phone list for your chapter, select Phone List from the Reports pop-up menu on the launching station.

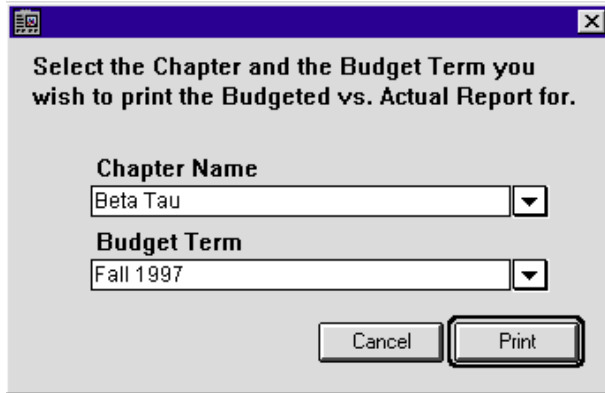
[Click here to view an example phone list.](#)

Budgeted vs. Actual Report

You can view how close your chapter is to its budget using this report.

1. Select Budgeted vs. Actual from the Reports pop-up menu.

2. Select the appropriate chapter and budget from the window shown below.



Select the Chapter and the Budget Term you wish to print the Budgeted vs. Actual Report for.

Chapter Name
Beta Tau

Budget Term
Fall 1997

Cancel Print

3. Click on Print to open the print menu.

The next window will be your print menu, which will vary according to the type of printer you have. If you need help with this window, please consult your printer manual.

Receivables Report

You can get a detailed report on what your chapter can expect to collect by generating a receivables report.

1. Select the type of receivables report you would like from the Report button on the launching station.
2. If you are printing an alumni or a current receivables report, The House Manager will ask you if you would like to include members with a zero dollar balance. Click on the Yes or No button according to your preference.
3. The next window will be your print menu, which will vary according to the type of printer you have. If you need help with this window, please consult your printer manual.

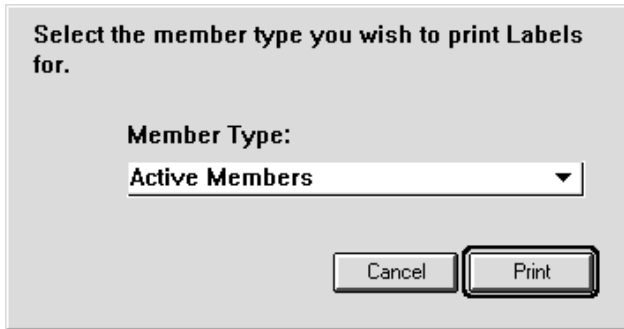
Actives, Alumni and Pledges Lists

You may want to have a list of certain portions of your membership. Simply select the membership list of your choice from the Reports button on the launching station.

Labels

For the times that you would like to send mailings to your membership, The House Manager will automatically generate labels for you. You can even choose which portion of your membership as well as the type of address. For example, you may want to send a mailing to the active membership at their permanent addresses during the summer months. Here's how:

1. Select Labels from the Reports button on the launching station.
2. Select the type of membership for which you want labels printed from the window displayed below and then click OK:



3. Select the type of address you want printed from the window that opens next and then click OK.
4. The next window will be your print menu, which will vary according to the type of printer you have. If you need help with this window, please consult your printer manual.

Quick Report Editor

While The House Manager has many types of reports that accomodate practically all of your needs, you might have a specific reporting need. The Quick Report Editor helps you build all kinds of custom reports.

Generate your selection of records.

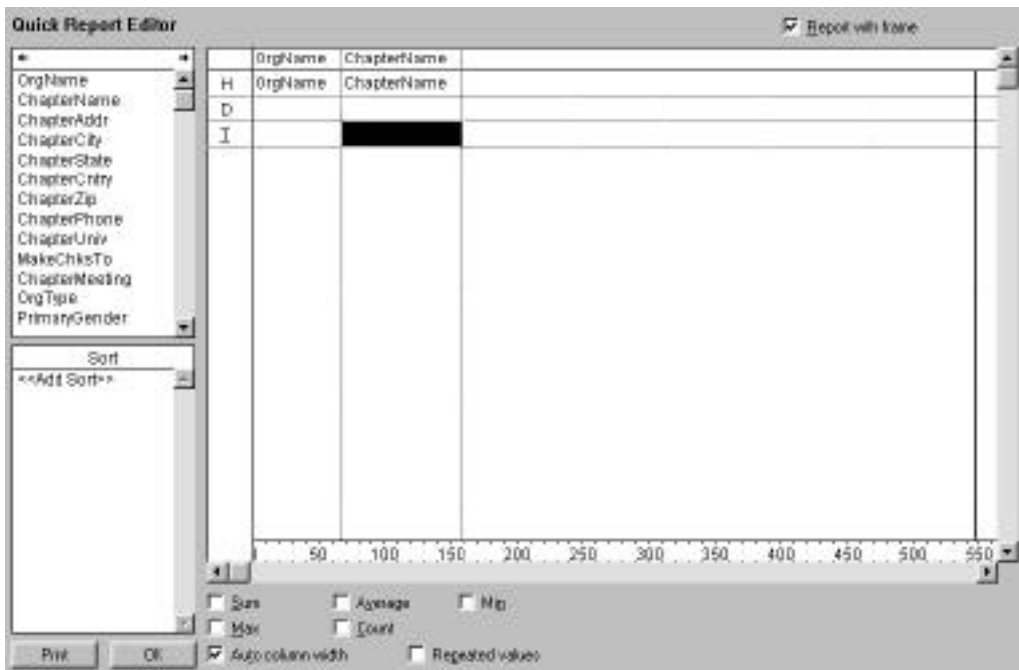
The report you are about to create will use the records that you currently have in your selection. Use the methods described in Chapter 7 to generate the selection you want.

Shortcut

If you simply highlight the records you'd like and click on Qk Rpt, The House Manager will create the new selection for you.

Creating a Simple Quick Report

1. To bring up the Quick Report Editor, click on the Qk Rpt button or select Quick Report from the Function menu.
2. Drag the fields you want displayed in your report into the top line of the report area.
3. Click on Print to send the report to the printer, or Click on OK to return to the list window.



You may want to edit your columns after you have dragged the fields into the report.

To Insert a column:

1. Click to the right of where you want the column.
2. Select Insert Column from the Edit menu.
3. Drag the field into the new column.

To Delete a column:

1. Click on the column to be deleted.
2. Select Delete Column from the Edit menu.

Adding Headers and Footers:

You can give clarity to your report by adding header and footer information. You enter header and footer information from the second page of the Page Setup window. To find it follow these two steps:

1. Select Page Setup... from the File menu. The first window will have page setup information for your printer.
2. Click on OK to move to the header and footer information.

Options:

You can enter whatever information you want in each of the six areas of the page.

- You can also adjust the header and footer size in pixels, inches or centimeters.
- To display the current date on your report, type **#D** in one of the footer or header boxes.

- To display the page number on your report, type **#P** in one of the footer or header boxes.
- You can change the font type, size and style of your header and footer information by using the **Font** and **Style** menus.

The image shows a dialog box for configuring report headers and footers. It is organized into three columns: Left header, Center header, and Right header. Each column has a text input field. Below the input fields, there are controls for 'Header size' and 'Footer size', both set to '25'. The 'Header size' section includes three radio buttons: 'Points' (selected), 'Inches', and 'Cm'. In the center of the dialog is a large empty rectangular box. On the right side, there are two buttons: 'Cancel' and 'OK'. At the bottom, there are three more text input fields labeled 'Left footer', 'Center footer', and 'Right footer'.

Frames or No Frames?

If you would like your report to be framed with borders, leave the Report with Frames box **checked**.

If you do not want a framed report, click in the Report with Frames box so that it is **unchecked**.

Sorting your records

You can sort your records before you print your report using the sort editor as described above, or you can sort your records using the Quick Report Editor.

Drag the <<Add Sort>> phrase on top of the column to be sorted.
The field name of that column will appear in the sort column on the left.

Sorting Options from the Quick Report Editor:

- You can click on the arrow beside the field name to change the sort order from ascending to descending and vice versa.
- You can sort more than one column; simply drag the <<Add Sort>> phrase onto another column.
- You can modify a sort by dragging the sort field name onto the column you want.
- You can delete a sort by selecting Delete Last Sort from the Other menu.

Formatting the Font and the Headings:

When you add a field to a column, the Quick Report Editor automatically inserts the field name as the heading for the column. However, you can change the headings to whatever you'd like.

1. Double-click on the heading of the column.
2. Edit the text.

You can also change the font type, style and size of your report. The report has headings (H), detail (D) and totals (T). It's possible modify each part of the report separately.

1. Select the line you'd like to modify. (H, D or T)
2. Use the **Font** and **Style** menus to modify the font.

Column Width:

The Quick Report Editor assumes that you would like it to calculate the width of your columns. If you leave the `Auto Column Width` box checked, the Quick Report Editor will find the widest entry and make that the column width. Sometimes, though, you might need to have a different column width. To set it:

1. Select the column for which you want to have manual column width control.
2. Uncheck the **Auto Column Width** box.
3. Move the cursor up to the very top of the column, then move it to the right or left border of the column. When it's right over the border, the cursor will change to a double-headed arrow.
4. When the cursor looks like a double-headed arrow, hold down the mouse button and drag the border to where you want it.

Note: *The bold vertical line on your report represents the edge of your page.*

Repeated Values:

The Quick Report Editor assumes that you do not want the same values repeated. This feature can make your report easier to read. You may prefer to use it when, for example, you are listing the cities for your members, and most of them live in the same city. If you want to print out all the values, repeated or not:

1. Select the column for which you want the values repeated.
2. Click in the Repeated Values box.

Print to...

From the Quick Report Editor you are able to print to a file. This enables you to edit your Quick Report information in a word-processing or spreadsheet application.

1. Select Print to... from the File menu. The following window will open:
2. Select Disk file.
3. Click OK.
4. When you are ready to print, select Print from the File menu.
5. Select a location to save your file.
6. Open your other application and import the file.

Note: *The fields will be separated by a tab, and the records will be separated by a carriage return.*

Save Your Report:

If you have created a sophisticated report, and there's a chance that you'll use it again, you can save yourself time by saving it to disk.

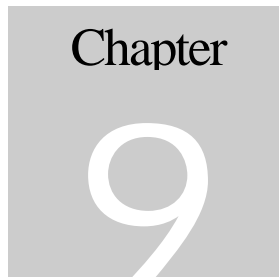
1. Select *Save As...* from the File menu
2. Select an appropriate location
3. Give the report a descriptive name
4. Click on *Save*

To recall your saved report:

1. Open the *Quick Report Editor* (click the *Qk Rpt* button or select *Quick Report* from the *Functions* menu).
2. Select *Open* from the File menu.
3. Find the file and click on *Open*.

Administration

Administering Your User Accounts, Passwords and Software Licenses



There are some house-keeping utilities in The House Manager to take care of user accounts, passwords and licensing.

User Accounts

When you first receive your copy of The House Manager, there are two accounts set up for you. The admin account has Administration access level. Administration accounts have access to all functions in the The House Manager.

The other user account is called Data, and it has Data Entry level access. Data Entry users have the ability to enter member information, but nothing else.

In light of the fact that there are only two levels of access, these two accounts are quite likely all you'll need. Nevertheless, if you would like more user accounts created, what follows are the instructions:

Create User Account

1. Click on the Other button on the launching station and select Setup Users. You will see this window:

Edit Users and Access Levels

Add

Delete

User Name	Access Level
Admin	Administration
Data	Data Entry

Done

2. Click on the **Add** button. A new window will open.



The image shows a dialog box titled "Add New User to Access THM". It contains three input fields: "User Name:", "Password:", and "Access Level:". The "Access Level:" field has two radio buttons: "Administration" (which is selected) and "Data Entry". At the bottom right of the dialog box are two buttons: "Cancel" and "Save".

3. Type in the user name and password.
4. Select a level of access by clicking on the appropriate radio button.
5. Click on **Save** to create this new user, or click on **Cancel** to abandon it.

Delete User Account

1. Click on the **Other** button on the launching station and select **Setup Users**. The **Edit Users and Access Levels** window will open, listing all users.
2. Click once on the user account to be deleted.
3. Click on the **Delete** button.
4. The **House Manager** will ask you if you're sure you want to permanently delete this user. Click **Delete** to proceed with the deletion, or click **Cancel** if you've changed your mind.

Change Password

If you want to change a user's password, use these steps:

1. Click on the **Other** button on the launching station and select **Change Password**.

2. Type in the user's name.
3. Type in the user's current password and press the TAB key.
4. Type in the user's new password and click on Enter.
5. Type in your new password again to confirm it.
6. Click OK.

The House Manager will confirm that the password has been changed.

Login as a New User

If you would like to change the user without quitting out of The House Manager

1. Click on the Other button and select Login as New User. This will log you out of The House Manager, and the login window will open.
2. Type in the new user name and press TAB
3. Type in the new user's password and press Enter.

Register The House Manager

If you have been using The House Manager on trial basis and now want to purchase a license for it, contact Summit Technologies Inc. by e-mail (sales@summittech.com) or by telephone at (970) 495-9790. Once you have received your serial key, follow these simple instructions to register your copy of The House Manager.

1. Select Register THM from the Other button on the launching station. The window below will open.

This is a full functioning DEMO version of The House Manager.

As a DEMO version, you may freely distribute this copy of The House Manager to anyone and you may have as many copies as needed on your computer.

To obtain the Serial Key for this copy of The House Manager, please contact Summit Technologies, Inc at 970-495-9790.

Serial Key:

841019

Continue

2. Type in the serial key that was given to you by Summit Technologies, Inc. when you bought your license.
3. Click on Continue.

Note: *The House Manager will function as a demonstration version for a limited number of uses or a limited amount of time. Thereafter it will stop functioning. For more information, please refer to the Software License Agreement or contact Summit Technologies, Inc. at (970) 495-9790.*

Add Multi-Chapter Support

To enable the multi-chapter features, you must have a multi-chapter license. To find out more about obtaining multi-chapter support, please contact Summit Technologies, Inc. at (970) 495-9790.

The House Manager 1994 - 1998 Summit Technologies, Inc.

Rushees ----- **200**

Minutes ----- **207**

Budget ----- **215**

Rushees

Entering and Modifying Rushee Information

Enter a Rushee

Let's say that you wanted to track potential rushees information. You will want to enter a Rushee and later transfer the information to a member screen if they join your chapter. The House Manager makes tracking rushees a breeze!

The House Manager has one screen to enter all rushee information. This screen keeps pertinent rushee information to one concise page.

Simply choose **Enter New Rushee** from the **Members** button on the launching station. This window will open:

View/Edit Rushee List

You can also view a list of rushees by selecting **List Rushees** from the **Members** button on the launching station.

Rushees: 6 of 6 records							
Rushee Name	Legacy	Phone #	Date of Birth	Yr in School	Dad Greek Affil	Mom Greek Affil	Rushing
Philip Barton	<input type="checkbox"/>	(970) 491-2256	00/00/00	Freshman		Chi Omega	Spring 98
Avery Bean	<input type="checkbox"/>	(970) 495-1263	00/00/00	Freshman			Spring 98
Scott Bowen	<input checked="" type="checkbox"/>	(970) 491-2256	12/22/80	Freshman	Sigma Nu	Chi Omega	Spring 98
Christopher Thompson	<input type="checkbox"/>	(970) 495-6598	00/00/00	Freshman		Pi Phi	Spring 98
Thatcher William	<input type="checkbox"/>	(970) 493-2598	00/00/00	Freshman	Farmhouse		Spring 98
Brian Willson	<input type="checkbox"/>	(970) 493-3652	00/00/00	Freshman	Kappa Sigma	Sigma Kappa	Spring 98

Search Sort Subset Show All Print Qk Rpt Delete Labels Close

To view/edit rushee information, simply double click on the record you want to work with from the above screen.

Buttons at the bottom of the List Rushee window. The buttons at the bottom of the **List Rushee** window can be very useful when you want to search for a specific rushee or contents of the rushee file, sort rushees using different parameters, print a list of rushees, create a custom Quick Report of rushee information, produce labels, or even delete a rushee.

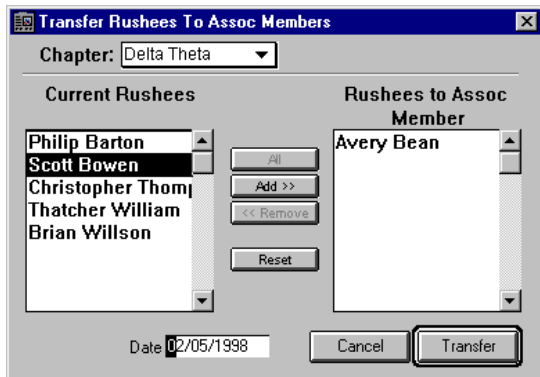
A complete explanation of these features can be found in the index under their specified title (i.e. Quick Report, etc).

Make a Rushee a Pledge

When a current rushee moves to pledge status, you will want to move him from rushee to pledge status in The House Manager program. You do this with the **Make Rushee a Pledge** function.

Select **Make Rushee a Pledge** from the **Members** menu. The window shown below will open up on your screen.

At the top of this window is a drop-down list showing all of the chapters available (if you have multi-chapter support). Clicking on this will drop down a list of all chapters.



The rest of the dialog box is divided into two halves. The left half shows all current rushees. The right half shows all the persons that you have selected to move to pledge status. You can

move persons from one side to the other by using the `Add` and `Remove` buttons found between the two panes. The `All` button will move all persons from one side to the other, and the `Reset` button will move them back again.

Once you selected all the persons you wish, enter the date they became pledges in the field on the lower left of the dialog (it will default to the current year), and then click `Transfer`.

If you wish to abort this procedure, click `Cancel` at any time.

To Move Rushee to Pledge

1. Scroll through the list of persons in the left-hand pane of the dialog box.
2. Click on the person to highlight them.
3. Click on `Add` to move the person to the right-hand pane.
4. Repeat with each person that you wish to transfer, or click on `All` to select all persons.
5. Click on the date field and enter the year of the transfer (or use the default).

6. Click on `Transfer` to complete the process.

Minutes

Entering and Modifying Minute Information

Entering Minutes

From the launching station, click on the **Chapters** button and select **Enter New Minutes**. The following screen will appear:

Add New Meeting Minutes [X]

Meeting Date: 02/05/98 Meeting Type: [] For Chapter: Delta Theta

Attendees: [Add Members] []

Minutes: []

[Save & Close] [] [] [] [] [Cancel] [Save & Repeat]

Meeting Type

Select a meeting type from the list provided in the pull down menu of **Meeting Type** or type in your own meeting type and press the **TAB** key. If the meeting type you specify is not on the list, THM will notify you and ask if you would like to add the new meeting type. Click on **Add** or **No** to continue.

Add Members

To add members to the attendees box press the **Add Members** button on the upper left hand corner of the **Add New Meeting Minutes page**. All of the members will appear in the lower of the two boxes, as shown below.

Add New Meeting Minutes [X]

Meeting Date: 02/05/98 Meeting Type: [v] For Chapter: Delta Theta

Attendees:

[Empty list box with scroll arrows]

Click on the members you wish to add

Roy Becker
Scott Bordenkirchen
Crispen Bowen
David Bronchochio
Vincent Checcini
Michael Ferris
Andrew Grabacki
Geoff Hamilton
William Hearst
Frank Hill
Jeff Holt
Nelson Howe
Andrew Insinga
Jesse Jackson
Gary Jaycox

[Empty list box with scroll arrows]

Clicking on a member will place them in the **Attendees** box. To eliminate confusion, THM only allows a member to be entered once. Clicking on the **AddAll** button will transfer all of the members to the **Attendees** box.

Once you have added all members in attendance, click on the **Return** key to return to the **Minutes** enterable area.

Entering The Minutes

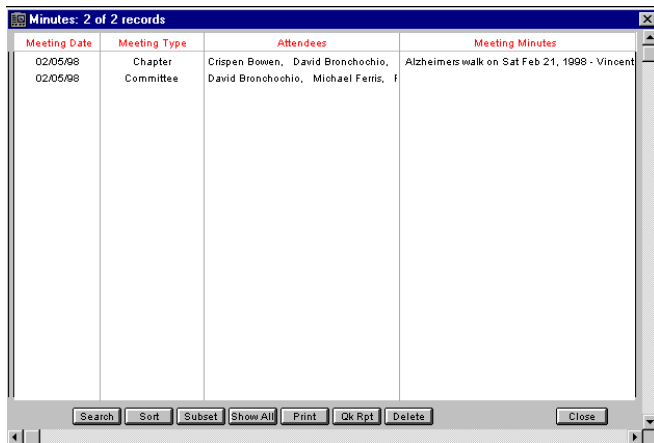
To enter the minutes simply type them in the **Minutes** box. When you are done press **Save & Close**.

Enter Minutes:

1. Enter the date of the meeting or use the default date.
2. Choose the Chapter (if you have multi-chapter support).
3. Enter the meeting type.
4. Select **Add Members** and click on attendees.
5. Select **Return** to enter minutes.
6. Enter minutes in the **Minutes** box.
7. Click on the **Save & Close** button.

List/Edit Minutes

From the launching station, click on the **Chapters** button and select **List Minutes**. The following screen will appear:



Meeting Date	Meeting Type	Attendees	Meeting Minutes
02/05/98 02/05/98	Chapter Committee	Crispen Bowen, David Bronchochio, David Bronchochio, Michael Ferris, f	Alzheimers walk on Sat Feb 21, 1998 - Vincent

Search Sort Subset Show All Print Ok Rpt Delete Close

From this screen double click on the minutes you would like to view/edit.

Buttons at the bottom of the List Chapter Minutes window. The buttons at the bottom of the **List Chapter Minutes** window can be very useful when you want to search for material in the minutes, sort the minutes using different parameters, create a custom Quick Report of minute information, print the minutes, or even delete a minutes report.

A complete explanation of these features can be found in the index under their specified title (i.e. Quick Report, etc).

Note: If you are going to use the Quick Report to print out the attendees in one or more meetings, deselect the box called Auto column width. This will allow all of the names to be printed without cutting off any names.

Billing Addendum

*Billing Statement Entrees
& Finance Charges*

Edit a Billing Statement

Let's say that you added a fee or charge to a member. Just after you clicked on Save, you realize it is the wrong member or the wrong amount. In most accounting software programs you would have to enter an adjustment amount to fix the mistake. This helps in preventing

any unethical money transfers and potential problems with the IRS. We received many requests to add editing functionality to this portion of THM. So, we decided to allow a small window of time (2days) to correct these sort of errors.

From the **Billing** button on the launching station, click on **Create Statements** or **View/Edit Statements**. The following screen will appear:

Member Statements

Delta Theta

Billing Statement for Andrew Grabacki

All Member Transactions

Balance Forward

Term	Date	Reason	Amount	Pay Form	Notes
Fall 1998	02/20/98	Late Fee	\$300.00		Missed 8/5/97 pa
Fall 1998	01/20/98	In House Dues	\$1,367.00		For Fall 1998
Spring 1998	08/08/97	In House Dues	\$1,244.00		For Spring 1998
Fall 1997	08/08/97	In House Dues	\$1,100.00		For Fall 1997

Charges from Fall 1998

 Current Balance

Sched Payments	Payments Recvd	Payments Remaining	Remaining Pymnt Amt
1	0	1	4,011.00

Becker, Roy - Active
 Bordenkirchen, Scott - Active
 Bowen, Crispin - Active
 Bronchochio, David - Active
 Checconi, Vincent - Active
 Ferris, Michael - Active
Grabacki, Andrew - Active
 Hamilton, Geoff - Active
 Hearst, William - Active
 Hill, Frank - Active
 Holt, Jeff - Active
 Howe, Nelson - Active
 Insinga, Andrew - Active
 Jackson, Jesse - Active
 Jaycox, Gary - Active
 Jefferson, Floyd - Active
 Johnson, Scott - Active
 Johnson, Jonathon - Active
 Johnson, George - Active
 Johnson, Robert - Active
 Kuchy, Donald - Active

All Members Owing Money

On the screen shot above, there is a fine of \$300 that was added to the account on 2/20/98. Lets say we realized that we should have added a \$50 fine instead of a \$300 fine.

If you catch it within 2 days*:

1. Highlight the entry to be changed.
2. Press the **Edit** button (If it is grayed you have missed the 2 day window).
3. A new window will appear for you to make changes.

***Note: 2 days is measured by days and not hours. This means if you make an entry at 11:45 PM on March 3rd, you will be able to change it for the remaining 5 minutes of March 3rd and all day on March 4th (until 11:59 PM). At 12:00 AM on March 5th the entry will be locked and you will need to make an adjustment.**

If you realize it after 2 days: If it has been two days since the entry has been made the **Edit** and **Delete** button will be inaccessible when you highlight an entry. In order to correct the mistakes, you will need to make an Adjustment.

Adjustments

To subtract a dollar amount from the already posted entry:

1. Click on **Add Payment**.
2. Enter the dollar amount to be subtracted in the **Payment Amt** box.
3. Select **Adjustment** in the **Payment Form** drop down menu.
4. Fill in any other relevant information and Save.

To add a dollar amount from the already posted entry:

1. Click on **Add Charge**.
2. Enter the dollar amount to be added in the **Payment Amt** box.
3. Select **Adjustment** in the **Payment Form** drop down menu
4. Fill in any other relevant information and Save.

Adding Finance Charges

When you print statements, the following screen will allow you to add finance charges.

Finance Charge Preferences...

Annual Interest Rate (%):

Minimum Finance Charge:

Assess finance charges on overdue finance charges
- illegal in some states !!

The following screen tells a little about finance charges and can be accessed from the **Info on Fin Chrgs** button (shown on previous screen).

How Finance Charges are Calculated...

Assume one had a balance of \$600 on the his/her last statement of 45 days ago and your annual interest rate is 15%. He/she paid \$250 since the last statement and now owes \$350. The finance charges would be $\$350 \times .15 / 365 \times 45$ or \$6.47. Therefore, the new balance would be \$356.47

Return

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Export Budget

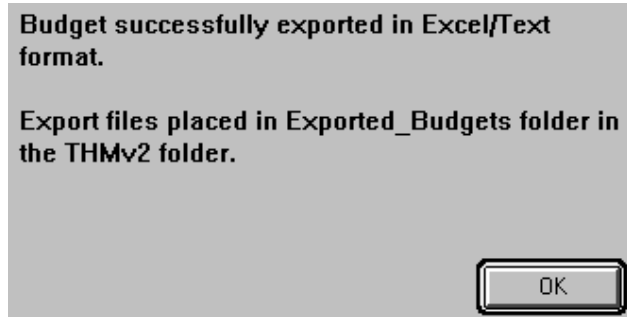
Exporting your budget allows for a simple way to send information to headquarters via an email enclosure. This gives added ability to export a budget in either Microsoft Excel text format or HTML format. If exported in Microsoft Excel text format, it can be opened by the Microsoft Excel software program. If exported in HTML format, it can be opened in any web browser (Netscape, Internet Explorer, AOL, etc.).

Click on the **Export** button, located in the lower left hand corner of each budget page, and the following screen will appear.



From here, choose either Excel/Text, HTML, or both.

Once you press OK, the following dialog will open.



THMv2 is the default folder for all exports and is found on the C: drive for the pc and the root level of the start up drive for the Mac(the drive where the system folder resides). If you are unable to find this folder or have changed the default pathway, perform a search for “Exported_Budgets”.

Promissory Notes

Each promissory note will detail the member's name, account status, number of payments remaining, and legal remedies should the member default. There is also an area for the member and his/her parent(s) or guardian(s) to sign.

When you print statements, you will notice a box next to **Promissory Notes**, as shown in the following screen shot.

Click on the empty box and a 'x' will appear, meaning that all promissory notes will print following the statements. When the box is empty, no promissory notes will print.

Enter the date payments are next due.

Due Date:

6/29/98

Other Memo

Reminder - all bills must be payed before formal!

Print Promissory Note(s)

Cancel OK

Budget vs Actual Detailed Expense Report

This report gives you the added ability to view all checks that have been written for each term in their appropriate budgeted category. The report records the **Amount Budgeted, Amount Spent, Difference, % of Budget**, just as in the **Standard Budget vs Actual Report**. The difference comes in with the addition of **Check To, Amount, Check #, and Date** for all checks written in each category. The following snapshot is an example of the “Office Exp” portion of the **Budgeted vs Actual - Expense Detail Report**.

<u>Category Name</u>				
<i>Office Exp</i>				
	<u>Check To</u>	<u>Amount</u>	<u>Check #</u>	<u>Date</u>
	Kinkos	2.40	6512	01/19/98
	Safeway	6.40	6515	01/21/98
	Kinkos	5.08	6530	02/02/98
	Kinkos	3.75	6529	02/02/98
	<u>Amount Budgeted</u>	<u>Amount Spent</u>	<u>Difference</u>	<u>% of Budget</u>
<i>Office Exp</i>	\$100.00	\$17.63	\$82.37	17.63 %

To print out either of the **Budgeted vs Actual** reports, go to **Reports** on the Launching Station and select **Budgeted vs Actual Report**. Then chose either **Standard** or **Expense Detail**.

Temporarily Inactive Member

This feature is particularly helpful if a member takes a leave of absence and is planning on returning. During the inactive time period the member will not be billed from the budget, but will remain on the books as an “Active” member. You are still able to add fees to their account and add their revenue to the budget (see following page entry entitled “Inactive Member Considerations”).

To access this feature, click on the **Members** button on the launching station and **select List Members**. Once in the member folder, click on the **Other Information** tab. Click on the box next to **Make Temporarily Inactive** as shown in the lower right hand corner on the following screen shot.

Modify Dave Aldworth [X]

Member Information Parent & H.S. Information Other Information Account Information

Email Addresses Add Delete

Email Address

Offices Held Add Delete

Office Title	Start Date	End Date

Committees

Committee	Term

Courses Taken Add Delete

Course ID	Course Name	Credits

Main Email Address Select Delete

Make Temporarily Inactive

Save & Close [Navigation Icons] Cancel Save & Close

Inactive Member Considerations

- To add a fee to an inactive members, click on the **Add Fee** button on the **List Members** window.
- To budget inactive member fees, go to the **Other Revenues** area on the appropriate budget and add the sum of the inactive members fees.
- To list inactive members, click on the **Sort** button at the bottom of the **List Members** window. Scroll down and click on **TempInactive**. Click on the arrow for descending or ascending order, make any other sorting needs and click on the **Sort** button. The list will now be in the order you specified and you can select and **Subset** button to perform other tasks.

Individual Member Login

This feature allows members to view their own account information without changing any sensitive information in their file (i.e. financial information, GPA, etc.). It also prohibits access to other areas of THM.

To Login

When starting up THM your are always prompted by a User Name and Password screen. Type “account” in the Password box and click on Login. The following screen will appear.

Enter Member Info ...

Last Name: smith

Soc Sec #: *****

Cancel Find

Each member must type in their last name and social security number and click Find.

If you are using a different number in the **Social Sec #** box located on the **Member Information** page, type in that number.

Committee

The Committee feature allows for better tracking of activities within the chapter. This feature records all members involved in the committees, each member's position, term, chapter, and amount budgeted.

Add a Committee

To add a new committee, click on **Chapter** from the launching station and select **Enter New Committee**. The following window will open.

Add New Committee [X]

Enter New Committee Record...

Chapter: Beta Tau Term: []

Committee: [] Budget: \$0.00

Notes: []

Members: [Add] [Delete]

Position	First Name	Last Name

[Save & Close] [Print] [Cancel] [Save & Repeat]

Term

The first thing you must do upon entering the **Add New Committee** window is to select the **Term**. The term list is generated from the budget, so if you have yet to create your budget you will have to enter the correct term manually. However, if you have not created a budget for the selected term, the program can not display a dollar amount budgeted. The only way to display a dollar amount is to have the committee listed on the budget.

If you enter the term manually, the program will verify that you want to add this to your list. If you want to add the term to your list, select the **Add** button. If you do not want to add it to your list, select the **No** button.

Note: The term must be selected FIRST (before committee and members) in order for the budget dollar amount to appear.

Budget

The dollar amount in the **Budget** box is generated from the budget report corresponding to the selected term. The only way to enter a dollar amount is to go to the prevalent budget and make changes.

To assure that the dollar amount appears, you must first select a **Term** and then the committee name.

Add Members

Click on the **Add** button and type in the first couple letters of the members last name, then press the **tab** key (located on your key board). Select the member you would like to add. Add their committee position and save.

Edit Members

To edit a member highlight the member with your mouse and click on the **Edit** button. Make the appropriate changes and click on the **Save** button.

Delete Members

To delete a member highlight the member with your mouse and click on the **Delete** button. A warning message will appear to verify that you want to permanently delete the member from the committee file. If you are sure you want to permanently delete this member click on the **Delete** button. Otherwise, click on the **Cancel** button.

Committee

Select a **Committee** from the drop down menu. If the committee name does not appear in the list, simply type it in and hit the **tab** key. In order for the budgeted dollar amount to appear, this committee must be listed on the budget of the term specified.

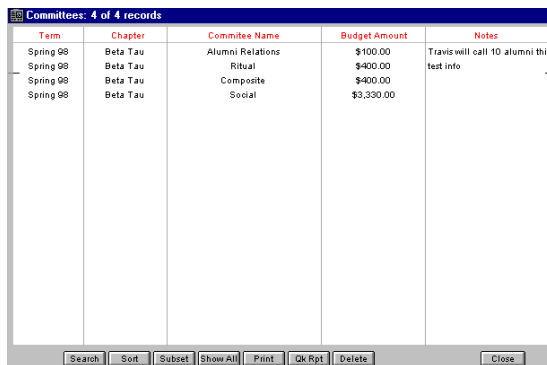
If you enter the committee name manually, the program will verify that you want to add this to your list. If you want to add the committee name, select the **Add** button. If you do not want to add it to your list, select the **No** button.

Notes

Notes on members, committee plans, etc. can easily be entered in this designated area.

List/Edit Committees

To list or edit a committee, click on **Chapter** from the launching station and select **List Committees**. The following window will open.



The screenshot shows a software window titled "Committees: 4 of 4 records". The window contains a table with the following data:

Term	Chapter	Committee Name	Budget Amount	Notes
Spring 98	Beta Tau	Alumni Relations	\$100.00	Travis will call 10 alumni this
Spring 98	Beta Tau	Ritual	\$400.00	test info
Spring 98	Beta Tau	Composite	\$400.00	
Spring 98	Beta Tau	Social	\$3,390.00	

At the bottom of the window, there is a toolbar with the following buttons: Search, Sort, Subset, Show All, Print, Qk Rpt, Delete, and Close.

From this screen double-click on the minutes you would like to view/edit. Make your changes and click on the **Save** button.

Buttons at the bottom of the List Committees window. The buttons at the bottom of the **List Committees** window can be very useful when you want to search for information recorded in the committees, sort the committees using different parameters, create a custom Quick Report of committee information, print a list of committees, or even delete a committee report.

A complete explanation of these features can be found in the index under their specified title (i.e. Quick Report, etc).

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