THM

The House Manager

SUMMIT TECHNOLOGIES, INC.

# The House Manager

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# Table of Contents

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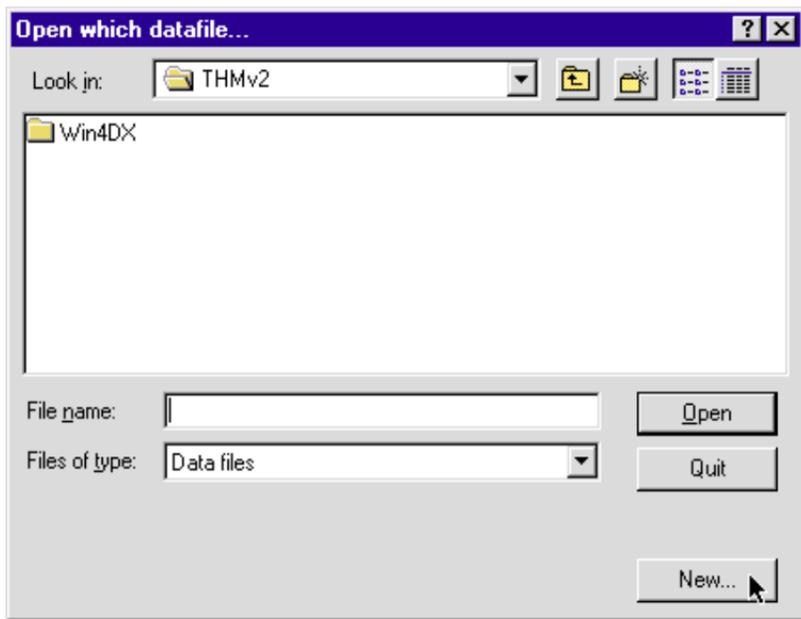
Click on New to open a new database of chapter information.

## 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.
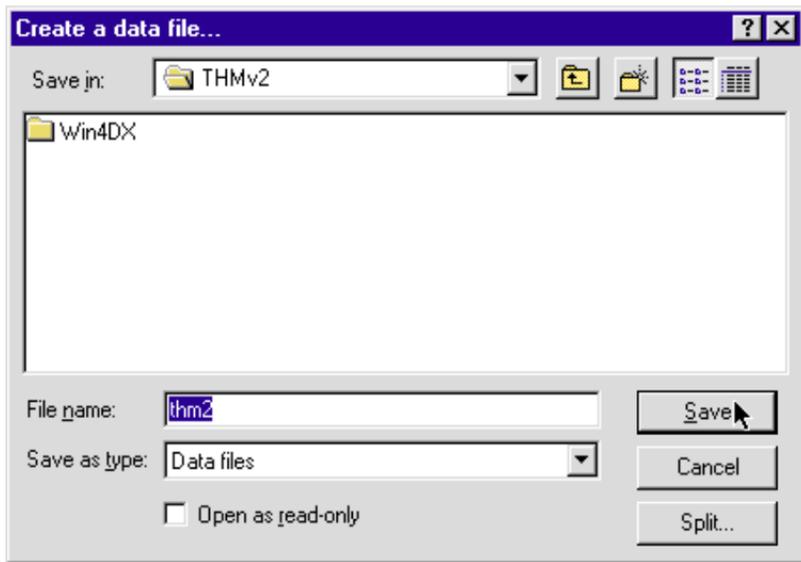
## The First Login

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: [                    ]

Quit    Login

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

[ Continue ]

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 | Alpha Omicron Pi

Chapter | Beta Tau

Organization Type
- ⊙ Fraternity
- ○ Sorority

Quit    License

# 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.

## Modify Beta Tau Chapter

### Chapter Information...

Organization Name
Alpha Omicron Pi

Chapter Name
Beta Tau

Chapter Address
625 S Shields

Chapter City
Fort Collins

State
CO

Chapter Zip
80521

Chapter Country
USA

Chapter Phone
(970) 224-0180

Chapter University
Colorado State U

Chapter Advisor
Mike Codd

Advisor Phone #
(970) 493-5261

Pledges are called
Pledge

Meeting Day
Monday ▼

Term Type
Quarter ▼

Weeks in Term
9

Make Checks Payable To
Alpha Omicron Pi Beta Tau

Late Fee Amount
$25.00

Amt Due Chapter
$26,956.00

Officer Info

☒ Chapter is Active

Organization Type
⦿ Fraternity
○ Sorority

Primary Gender
⦿ Male
○ Female

☒ 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.

| Chapter Advisor | Advisor Phone # | Pledges are called |
|---|---|---|
| Mike Codd | (970) 493-5261 | Pledge |

| Meeting Day | Term Type | Weeks in Term |
|---|---|---|
| Sunday ▼ | Semester ▼ | 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.*
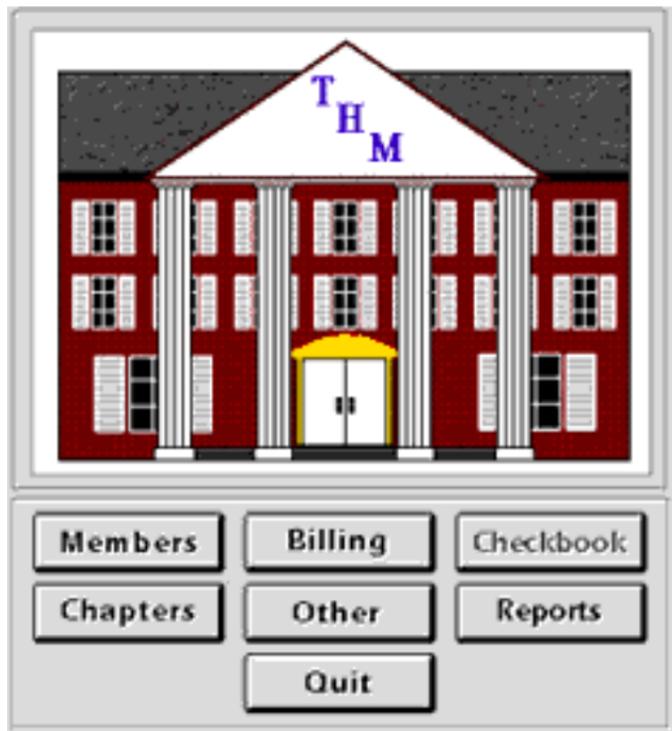
Adding Member Information

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:

| Active | Chapter Name | University | Chapter Phone | Chapter Advisor | Advisor Phone | # Mems | Receivables |
|--------|--------------|------------|---------------|-----------------|---------------|--------|-------------|
| ☒ | Beta Tau | Colorado State U | (970) 224-0180 | Mike Codd | (970) 493-5261 | 62 | 26,956.00 |

Search | Sort | Subset | Show All | Print | Qk Rpt | Delete | Labels | Close

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.

## Modify Beta Tau Chapter

## Chapter Information...

Organization Name
Alpha Omicron Pi

Chapter Name
Beta Tau

Chapter Address
625 S Shields

Chapter City
Fort Collins

State
CO

Chapter Zip
80521

Chapter Country
USA

Chapter Phone
(970) 224-0180

Chapter University
Colorado State U

Chapter Advisor
Mike Codd

Advisor Phone #
(970) 493-5261

Pledges are called
Pledge

Meeting Day
Monday ▼

Term Type
Quarter ▼

Weeks in Term
9

Make Checks Payable To
Alpha Omicron Pi Beta Tau

Late Fee Amount
$25.00

Amt Due Chapter
$26,956.00

[Officer Info]

Organization Type
⊙ Fraternity
○ Sorority

Primary Gender
⊙ Male
○ Female

⊠ Chapter is Active

⊠ 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.



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:



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.



**Select a member by clicking on record.**

| Member Name | Chapter | Class Of |
|---|---|---|
| Smith, Adam | Beta Tau | 1999 |
| Smith, Sean | Beta Tau | 1999 |
| Smith, Tom | Beta Tau | 1999 |
| Smith, William | Beta Tau | 1998 |
| Smithson, Steven | Beta Tau | 2000 |

Add New Member
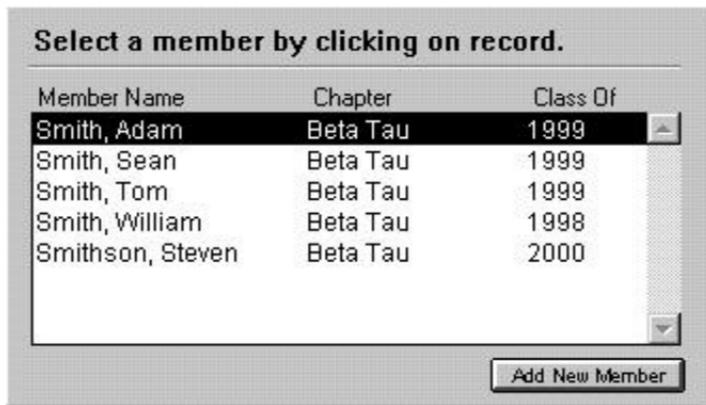
**Note**: *Here the user typed "smi" into the last name field. The House Manager searched for everything* **beginning** *with "smi". Entering part*

*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** ✕

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

Father's Information

First Name            Last Name
Laurence              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

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

**Email Addresses** [ Add ] [ Delete ]

| E-Mail Address |
| --- |
| smithson@webstar.com |

**Offices Held** [ Add ] [ Delete ]

| Office Title | Start Date | End Date |
| --- | --- | --- |
| | | |

**Courses Taken** [ Add ] [ Delete ]

| Course ID | Course Name | Credits |
| --- | --- | --- |
| | | |

**Main Email Address** [ Select ] [ Delete ]

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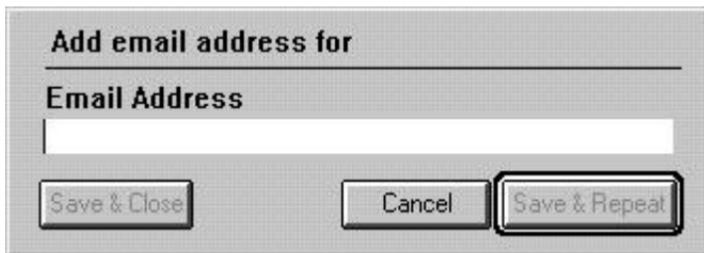
Here, you can type in an email address for this member. Once you have added the address, you can click on Save and Repeat to add another email address, Save to save the address and close the dialog box, or Cancel to close the dialog box without saving the new email address.

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:

This will permanently delete the selected
E-mail Address record for Steven Seagal.

Are you sure?
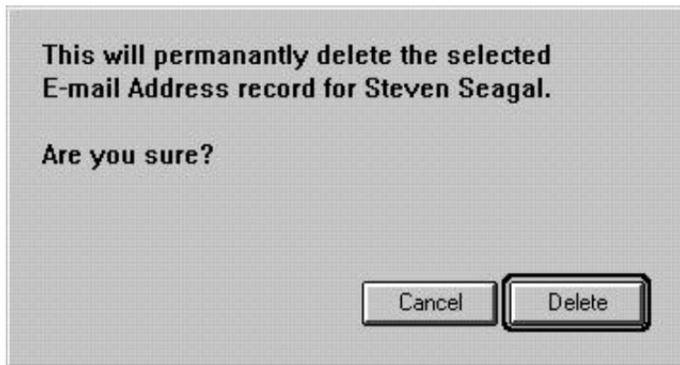
Cancel     Delete

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 Add 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:

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.

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

| 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 | 08/04/97 | Dues | $413.00 | | For Fall 1997 |
| Fall 1997 | 06/15/97 | Payment | -$295.00 | Check | |

Print Statement

Show All Trnsactns

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:

**Add New Charges**

**Find member to enter new item for...**

Last Name

First Name

Chapter

Class Of

Balance

Charge Amt

0.00

Charge Date

08/04/97

Charge Type

Charge Notes

Save & Close

Cancel

Save & Repeat

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:

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:
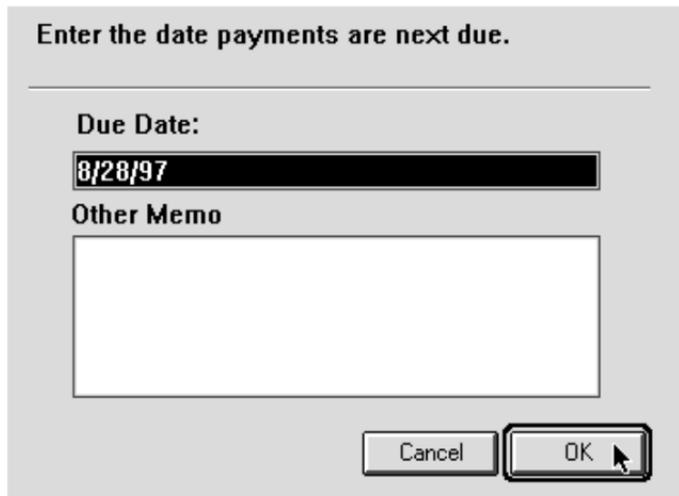
Enter the date payments are next due.

**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.

   **Click here to see a sample statement.**

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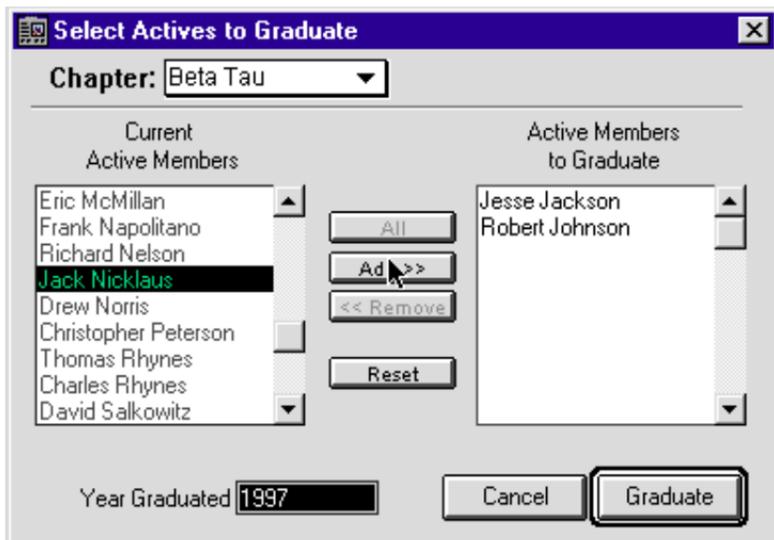
The rest of the dialog box is divided into two halves. The left half shows all current active members. The right half shows all the members that you have selected to graduate. You can move members from one side to the other by using the Add and Remove buttons found between

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:

**Select Pledges to Activate**

**Chapter:** Beta Tau

Current Pledges

| Darrell Pederson |
| Christopher Peltz |
| Jeffrey Pequette |
| Bob Peters |
| Thomas Richards |
| Brian Robb |
| Steven Smithson |
| John Vasconcellos |
| Kenneth Woods |

All

Add >>

<< Remove

Reset

Pledges to Activate

| William Clinton |
| David Fordham |
| William Smith |

Date Activated 08/14/1997

Cancel    Activate

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:

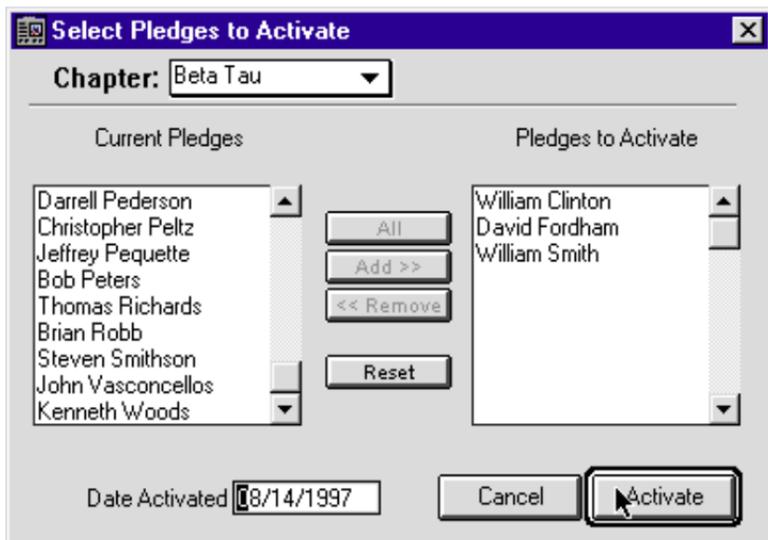1. Scroll through the list of members in the left-hand pane of the dialog box.

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** ☒

Chapter Name: **Beta Tau**

| Term | In House % | Bad Debt % | In House | Out of House | Pledges |
|---|---|---|---|---|---|
| | 85 % | 3 % | Members: 33 | 10 | 19 |

**Fixed Expenses**

Add Item | Del Item       House Expenses

Sort by...
Item

Tot House
$0

Add Item | Del Item       General Expenses

Sort by...
Item

Tot Gen
$0

Total Fixed Exp:     $0

**Variable Expenses**

Add Item | Del Item

| Item | Qty | Cost | Total |
|---|---|---|---|

Total Variable Exp:     $0

**Expense Breakdown**

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

**Revenues**

☒ Use Suggested Amounts

| | 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 |

Other Revenues:    $ 0.00
Fee Revenues:    $ 0.00
Total Expenses:    $ 0.00

Budget Surplus    $ 0.00

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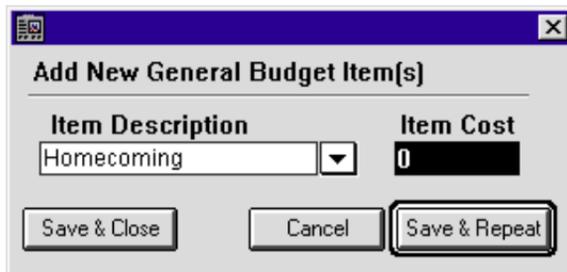
Type in the description of your item, and press Tab. If the item has not been entered before, you will be asked if you would like to add it. Added items are remembered in a pop-up list for you to use the next time you enter that item — your budget for next term, for example.

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 my 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:

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.

| Closed | Budget Term | Chapter Name | In House | Out of House | Pledge Fee | Total Exp | Bad Debt |
|--------|-------------|--------------|----------|--------------|------------|-----------|----------|
| ☐ | Fall 1997 | Beta Tau | $963 | $412 | $412 | $56,428 | 3 % |

Search   Sort   Subset   Show All   Print   Qk Rpt   Delete   Close

# 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:*

Select the budget you wish to use to create
statements for Beta Tau

**Select Budget:**

Spring 1998 ▾

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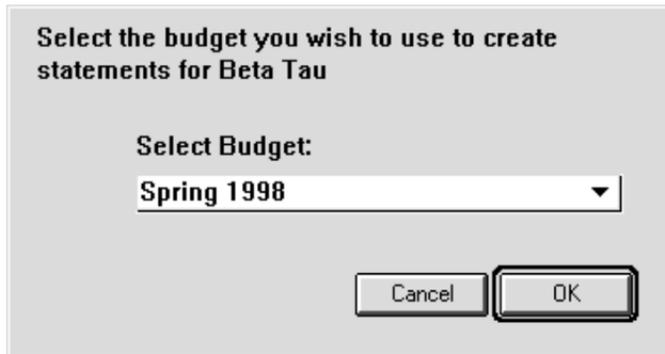
Use the pull-down list to choose which budget will be the basis for your statements and then click OK.

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

**Statements Created!**

**Would you like to view the list of members
that have just had their statements created?**

No   View

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**                                                                    ⊠

| Beta Tau ▼ |

### Billing Statement for Scott Johnson

Becker, Roy - Active
Bordenkirchen, Scott - Active
Bowen, Crispen - Active
Bronchochio, David - Active

All Member Transactions

| Add Charge | Add Payment |        Balance from Previous Terms        0.00

Checcini, Vincent - Active
Ferris, Michael - Active

| 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 | |

Gates, William - 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
Kurth, Drew - Active

| Print Statement |          Charges from Fall 1997          118.00

| Show Cur Transctns |              Current Balance              118.00

| All Members Owing Money ▼ |

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

| Done |

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Enter a Charge for a Selected Member

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

## Enter New Charge

**Enter new item for Scott Johnson**

Last Name
Johnson

First Name
Scott

Chapter
Beta Tau

Class Of
1996

Balance
118.00

Charge Amt
0

Charge Date
08/04/97

Charge Type

Charge Notes

Save & Repeat    Cancel    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:

## Enter New Payment

**Enter payment for Scott Johnson**

| Last Name | First Name |
|---|---|
| Johnson | Scott |

| Chapter | Class Of | Balance |
|---|---|---|
| Beta Tau | 1996 | 118.00 |

| Payment Amt | Payment Date | Payment Form |
|---|---|---|
| 0 | 08/04/97 | ▼ |

Check or Card Number

[                    ]

[Save & Repeat]    [ Cancel ]   [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.

**Click here to view a sample statement printout.**

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

**Find member to enter new payment for...**

Last Name | First Name

Chapter | Class Of | Balance

Payment Amt | Payment Date | Payment Form
0.00 | 08/04/97 |

Check or Card Number

Save & Close | Cancel | Save & Repeat

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** ▣ ✕

Beta Tau ▼    **First National Checking for the Beta Tau chapter.**

[New Acct] [Close Acct]

First National Checking ▲

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

| DATE | NUMBER | DESCRIPTION | | PAYMENT | √ | DEPOSIT |
|------|--------|-------------|--|---------|---|---------|
| | | **MEMO** | **CATEGORY** | | | |
| 6/22 | 14 | Alpha Omicron Pi Beta Tau House Corp | | 5,000.00 | ☐ | 0.00 |
| 1997 | | | Mortgage | | | |
| 6/22 | Deposit | Deposit Funds | | 0.00 | ☐ | 2,682.00 |
| 1997 | | | Deposit | | | |
| 6/22 | Deposit | Deposit Funds | | 0.00 | ☐ | 6,562.00 |
| 1997 | | | Deposit | | | |
| 6/15 | Deposit | Deposit Funds | | 0.00 | ☐ | 75.00 |
| 1997 | | | Deposit | | | |
| 6/15 | 12 | David Fordham | | 500.00 | ☐ | 0.00 |
| 1997 | | | Homecoming | | | |
| 6/15 | Deposit | Deposit Funds | | 0.00 | ☐ | 295.00 |
| 1997 | | | Deposit | | | |
| 6/15 | Deposit | Deposit Funds | | 0.00 | ☐ | 818.00 |
| 1997 | | | Deposit | | | |
| 6/15 | Deposit | Deposit Funds | | 0.00 | ☐ | 295.00 |
| 1997 | | | Deposit | | | |
| 6/15 | Deposit | Deposit Funds | | 0.00 | ☐ | 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.

**Enter New Check**

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

CHECK #15

DATE 08/17/97

The University of

$ 0.00

PAY TO THE ORDER OF

DOLLARS

MEMO

Chrg to Account          Term
                         Fall 1997          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 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:

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.

> **Are you sure you wish to void the selected transaction?**
>
> [ Cancel ]   [ Void ]
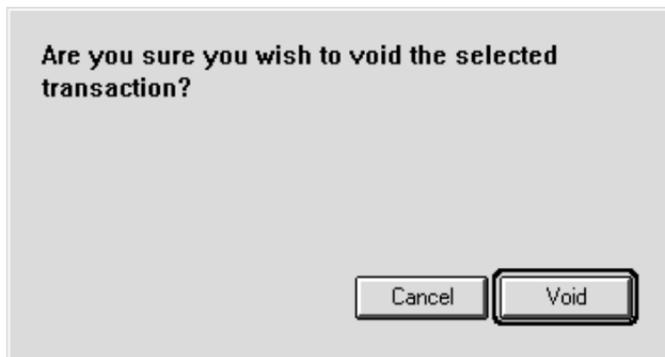
**Note:**   *Once you have voided a check, you will no longer be able to edit it.*

# 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

| √ | Date | Chk Num | Description | Memo | Amount |
|---|------|---------|-------------|------|--------|
| ☐ | 06/14/97 | | Opening Balance | | 2,415.66 |
| ☐ | 06/15/97 | Deposit | Deposit Funds | | 818.00 |
| ☐ | 06/15/97 | Deposit | Deposit Funds | | 295.00 |
| ☐ | 06/15/97 | Deposit | Deposit Funds | | 75.00 |

### Checks & Other Payments

| √ | Date | Chk Num | Description | Memo | Amount |
|---|------|---------|-------------|------|--------|
| ☐ | 06/15/97 | 11 | Alpha Omicron Pi Housing Corp | | 5,000.00 |
| ☐ | 06/15/97 | 12 | David Fordham | | 500.00 |
| ☐ | 06/15/97 | 9 | David Fordham | | 500.00 |
| ☐ | 06/15/97 | 10 | The Candleshop | | 25.71 |
| ☐ | 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*
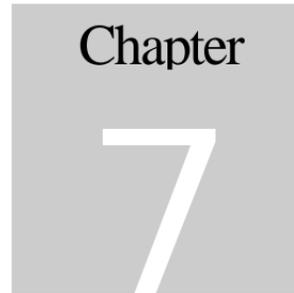
The House Manager has powerful searching and reporting capabilities that allow you to generate all kinds of reports. This chapter guides you through the steps you'll need to create just about any report you can imagine. The examples we are using here are taken from the Members file. Chances are good 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:

| Member Name | Address | Phone Number | In House | Member Type | Chapter Name | Class of |
|---|---|---|---|---|---|---|
| Roy Becker | 211 West Hill Road | (970) 282-7467 | ☐ | Active | Beta Tau | 1996 |
| Scott Bordenkirchen | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1996 |
| Crispen Bowen | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1996 |
| David Bronchochio | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1998 |
| Vincent Checcini | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1997 |
| Michael Ferris | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1997 |
| William Gates | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1997 |
| Andrew Grabacki | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1996 |
| Geoff Hamilton | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1996 |
| William Hearst | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1999 |
| Frank Hill | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1996 |
| Jeff Holt | 211 Meldrum St | (970) 493-3451 | ☐ | Active | Beta Tau | 1996 |
| Nelson Howe | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1997 |
| Andrew Insinga | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1997 |
| Jesse Jackson | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1996 |
| Gary Jaycox | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1997 |
| Floyd Jefferson | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1997 |
| Scott Johnson | 211 Medrum St | (970) 493-3451 | ☐ | Active | Beta Tau | 1996 |
| Jonathon Johnson | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1998 |
| George Johnson | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1996 |
| Robert Johnson | 2435 S Shields | (970) 224-5400 | ☒ | Active | Beta Tau | 1998 |
| Donald Kuchy | 2435 S Shields | (970) 224-5400 | ☒ | 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.
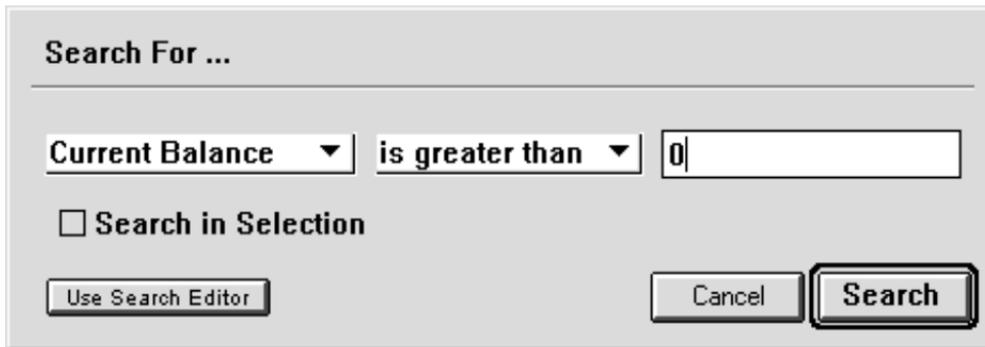


**Note:** *The Search For.. layout is available only from the Members window. On the Budget and Chapters windows the Search button will bring up the Search Editor, which is described in detail directly below.*

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**

| FirstName | is equal to |
| MiddleName | is not equal to |
| **LastName** | is greater than |
| | is greater than or equal to |

○ And
○ Or
○ Except

**Value**

☐ Search in selection

| Save... | Load... | Cancel | OK |

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@ |
|-----------|-------------|-------|

← →

FirstName
MiddleName
**LastName**

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

○ And
○ Or
○ Except

**Value**  Stev@

☐ Sea_rch in selection

| _S_ave... | _L_oad... | _C_ancel | 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 | | ○ And |
|---|---|---|---|---|
| FirstName | | is not equal to | | ○ Or |
| MiddleName | | is greater than | | ○ Except |
| **LastName** | | is greater than or equal to | | |

**Value**

☐ Search in selection

| Save... | Load... | Cancel | OK |
|---|---|---|---|

## 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.
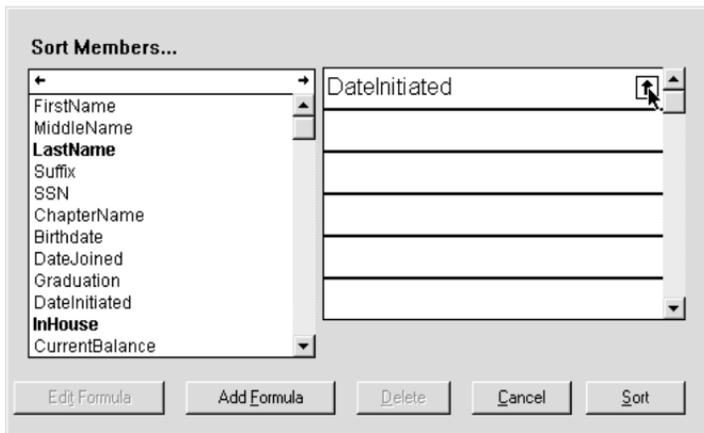
Here are instructions for a simple sort:

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.

**Sort Members...**

| ← | → | DateJoined | ⬇ |
|---|---|---|---|
| FirstName | | | |
| MiddleName | | | |
| **LastName** | | | |
| Suffix | | | |
| SSN | | | |
| ChapterName | | | |
| Birthdate | | | |
| DateJoined | | | |
| Graduation | | | |
| DateInitiated | | | |
| **InHouse** | | | |
| CurrentBalance | | | |

| Edit Formula | Add Formula | Delete | Cancel | Sort |
|---|---|---|---|---|
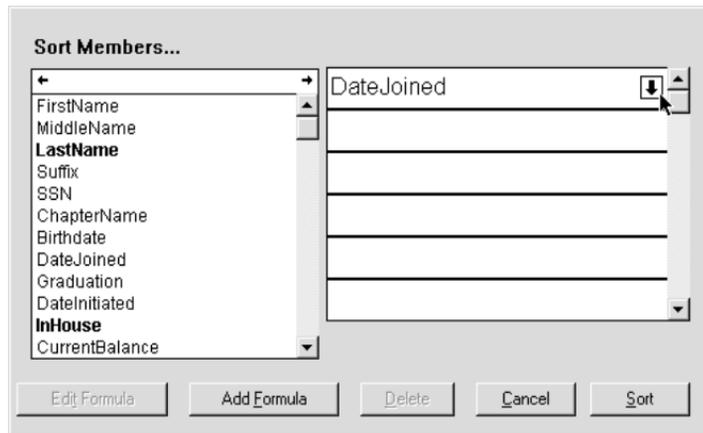
Many Sort Criteria:

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:



Select the report you wish to print

⊙ List of Chapters
○ Chapter Detail Info

Cancel    OK
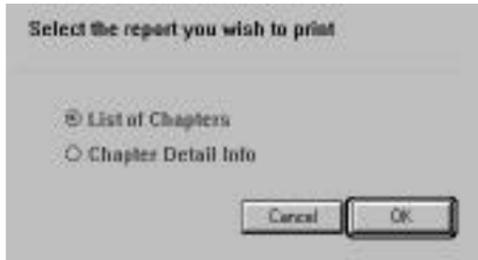
3. Select the type of printout you would like.

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.
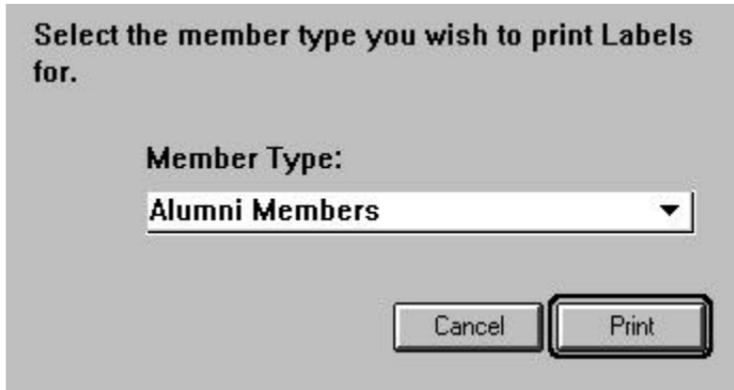
> **Select the member type you wish to print Labels for.**
>
> **Member Type:**
>
> Alumni Members ▼
>
> Cancel   Print

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.

   **Click here to view an sample label printout.**

**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 | Charge Date | Charge Type |
|---|---|---|
| 50.00 | 11/02/97 | 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.
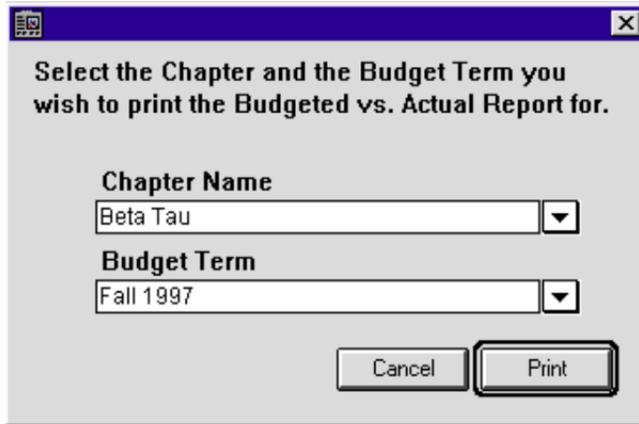


3.  Click on Print to open the print menu.

    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:

Select the member type you wish to print Labels
for.

Member Type:

Active Members  ▼

Cancel  Print
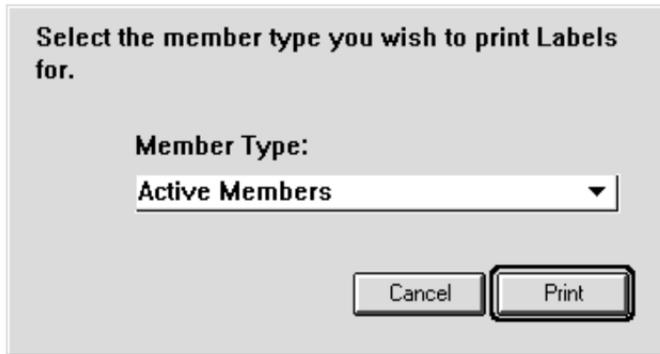
3. Select the type of address you want printed from the window that opens next and
   then click OK.

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.

**Click here to view an example of a printout of labels.**

# Quick Report Editor

While The House Manager has many types of reports that accomomdate 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.

**Quick Report Editor**
☑ Report with frame

OrgName
ChapterName
ChapterAddr
ChapterCity
ChapterState
ChapterCntry
ChapterZip
ChapterPhone
ChapterUniv
MakeChksTo
ChapterMeeting
OrgType
PrimaryGender

| | OrgName | ChapterName | |
|---|---|---|---|
| H | OrgName | ChapterName | |
| D | | | |
| I | | | |

Sort
<<Add Sort>>

☐ Sum    ☐ Average    ☐ Min
☐ Max    ☐ Count
☑ Auto column width    ☐ Repeated values

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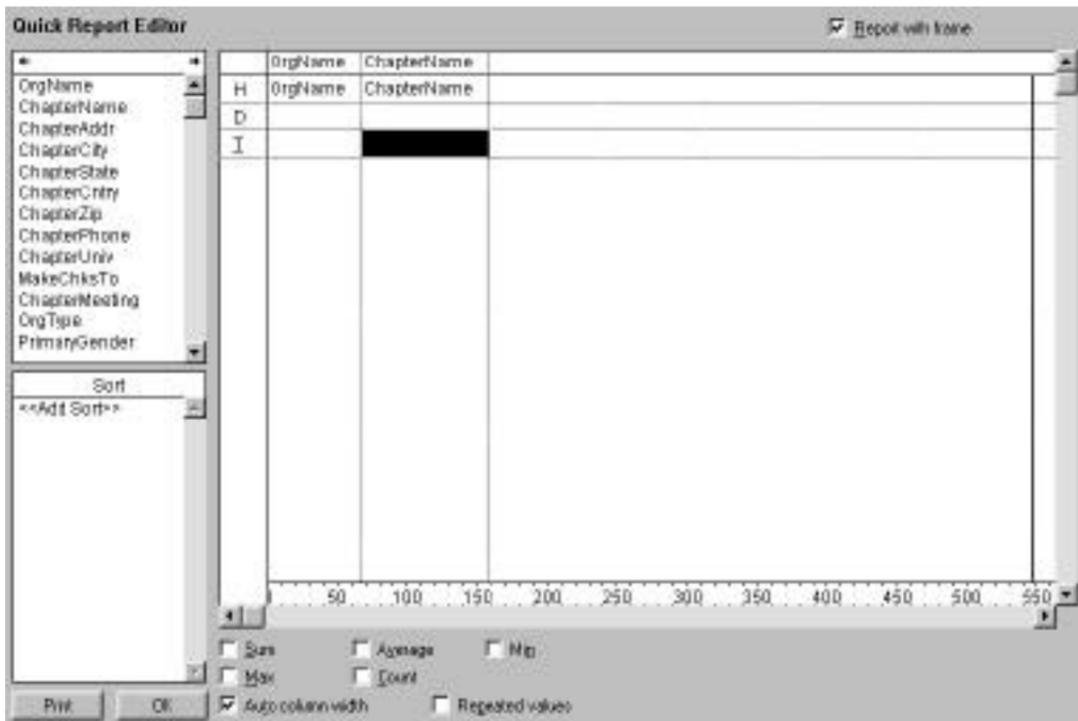
You may want to edit your columns after you have dragged the fields into the report.

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.

## 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

*Administrating 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.
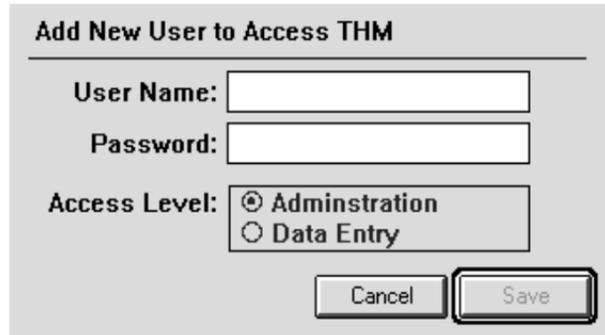
```
Add New User to Access THM
─────────────────────────────────

     User Name: [                    ]

      Password: [                    ]

  Access Level: ⦿ Administration
                ○ Data Entry

                      [ Cancel ] [ 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

*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:

**Modify Rushee Scott Bowen**

| Last Name | First Name | Middle Name | Chapter Rushing |
|---|---|---|---|
| Bowen | Scott | M | Delta Theta |

Local Address
1235 South Shiels St

Rush Term
Spring 98

| Local City | State | Country | Zip |
|---|---|---|---|
| Fort Collins | CO | USA | 80524 |

Gender

⦿ Male
○ Female

email Address
bowen@holly.colostate.edu

Phone Number
(970) 491-2256

| Birthdate | Social Sec # | Major | GPA | HS GPA |
|---|---|---|---|---|
| 12/22/80 | 222-22-2222 | Business | 3.50 | 0.00 |

| Dad's Name | | Mom's Name | |
|---|---|---|---|
| Tomas | Bowen | Sherry | Bowen |

☒ Is Legacy

| School Dad Attended | School Mom Attended |
|---|---|
| Colorado State University | University of Colorado |

Year in School

⦿ Freshman

| Dad Greek Affil | Mom Greek Affil |
|---|---|
| Sigma Nu | Chi Omega |

○ Sophomore
○ Junior

| Dad Occupation | Mom Occupation |
|---|---|
| CPA | Pediatrician |

○ Senior
○ Other

Notes

Legacy Info

Grad Year
2001

Save & Close    |◄ ◄ ► ►|    Cancel    Save & Close

Enter the appropriate data and your free to spend your time elsewhere!

# View/Edit Rushee List

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

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.
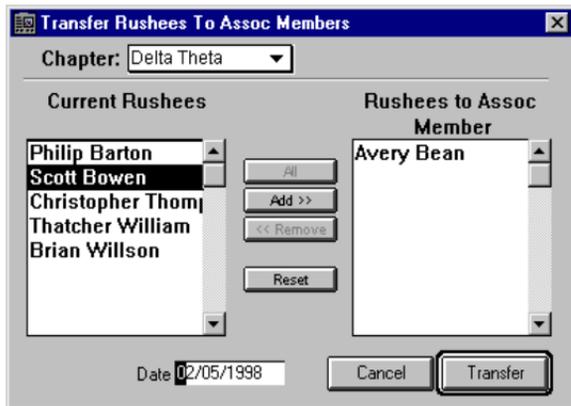


The rest of the dialog box is divided into two halves. The left half shows all current rushees. The right half shows all the persons that you have selected to move to pledge status. You can

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

**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

**Meeting Date**
02/05/98

**Meeting Type**
▼

**For Chapter**
Delta Theta

**Attendees**

▲
▼

Click on the members you wish to add    [ Add All ]

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

[ Return ]

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:

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**

Becker, Roy - Active
Bordenkirchen, Scott - Active
Bowen, Crispen - Active
Bronchochio, David - Active
Checcini, 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 ▼

All Member Transactions

| Add Charge | Add Payment | Edit | Delete | | 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 |

| Print Statement | Charges from Fall 1998 |

| Show Cur Transctns | Current Balance |

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

Done

**217**

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 (%):  6.00 %

Minimum Finance Charge: 0

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

Info on Fin Chrgs      Cancel    Continue

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 *.15 / 365 * 45 or $6.47. Therefore, the new balance would be $356.47

Return

The House Manager     1994 - 1998 Summit Technologies, Inc.

## 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.

```
Select format you wish to export budget to.

    ⊙ Excel / Text
    ○ HTML
    ○ Both Excel and HTML

                              Cancel        OK
```

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

Once you press OK, the following dialog will open.

> **Budget successfully exported in Excel/Text format.**
>
> **Export files placed in Exported_Budgets folder in the THMv2 folder.**
>
> OK

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**.

| Category Name | | | | |
|---|---|---|---|---|
| Office Exp | | | | |

| | Check To | Amount | Check # | Date |
|---|---|---|---|---|
| | 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 |
| | Amount Budgeted | Amount Spent | Difference | % of Budget |
| Office Exp | $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**

| Member Information | Parent & H.S. Information | Other Infomation | Account Information |
|---|---|---|---|

Email Addresses  [ Add ] [ Delete ]

| Email Address |
|---|
| |

Offices Held  [ Add ] [ Delete ]

| Office Title | Start Date | End Date |
|---|---|---|
| | | |

Committes

| Commiteee | Term |
|---|---|
| | |

Courses Taken  [ Add ] [ Delete ]

| Course ID | Course Name | Credits |
|---|---|---|
| | | |

Main Email Address  [ Select ] [ Delete ]

☒ Make Temporarily Inactive

[ Save & Close ]  [ 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.

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

### 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.



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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