

Managing APT - Webinar #1



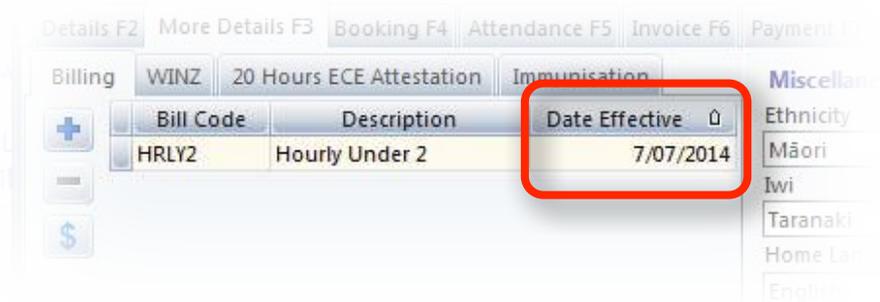
Questions & Answers

Rachel - Would it be a good idea to get our IT guy to help us to restore?

Absolutely! As I mentioned last night, a restore is not without its risk. You can do it yourself safely by doing it on a different computer, but if not, having your IT guy there is a great idea.

Kate - Re: Changing billing codes. Can they be effective part way through a week? e.g. if a child turns 2 and the rates change?

Yes. The billing code will take effect on the exact date set in the Date Effective column. If no date is set (ie. just one billing code is selected) then the billing code will be effective from the join date of the child.



Rachel - If you change the billing code to zero would it record if you put a new start date in e.g a new line?

If a billing code is changed in the way I showed in the recording last night (ie. changed from one code to another, then back again) I am not aware of any reports or logs where we would see the actual change in the code itself. We would spot the change in the family's account (ie. the effect of the change in billing codes) if we monitor the correct reports, but not the changing of the codes.

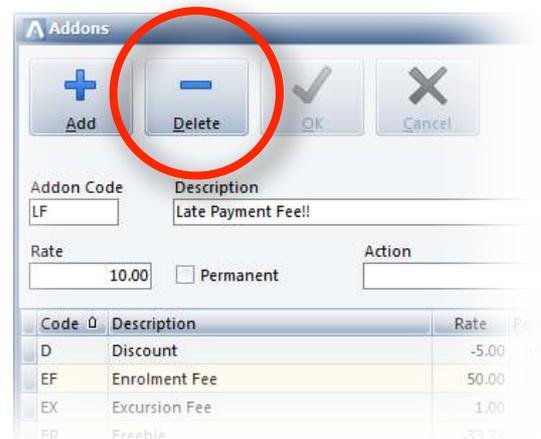
Chamila - If we change the charges in the invoice using MOD how it will affect to the billing code?

Using the MOD tick box does not affect the billing code. That will remain the same - but of course the family's account would be changed for that week. The ticks will remain once they are placed there, so after the rollover, if we go back (using the date selection in the invoice tab) we would see the ticks and the changes. But the key is, we would have to go back on that child's invoice tab to see it. And unless we were alerted in some way, we would have little reason to do so.

Chamila - I have some add-ons we used last year. They are not valid anymore. Is there any possibility for me to get rid of those add-ons?

You can only delete an addon if it has never been used. Select the Change/Add Addon Codes button, and if you are able to delete the code the Delete button will be available.

If you have old addons that are getting in the way day-to-day, change their codes to starting with a 'Z' so they fall to the bottom of your list.



Lara - Can you password protect discount applications?

The only passwords available in APT were the ones we saw last night. Sorry!

Rachel - Can you see the backup log when you are using the cloud?

I am not completely familiar with the cloud interface, but I would expect you could see the backup log, but it won't have any information in it as the backups are done away from that computer. Once APT allows backing up from a local computer (when on the cloud), and you do additional backups on your computer, then there will be information in the log.

Chamila - Weekly I enter the payments according to the bank statements. Sometimes we have payments without reference. Can we manage unallocated payments in APT? At the moment I put a note in the bank statement.

Interesting question. There is no simple way to hold unallocated payments in APT - and putting a note on the bank statement is probably the simplest solution. It is possible to set up a 'fake' child and use that to hold the payments (some centres use this technique for bond payments from caregivers). You would post all the unknown payments to that fake child account, and adjust them out one at a time when you have a child to put them to. A bit messy but it may work for you.

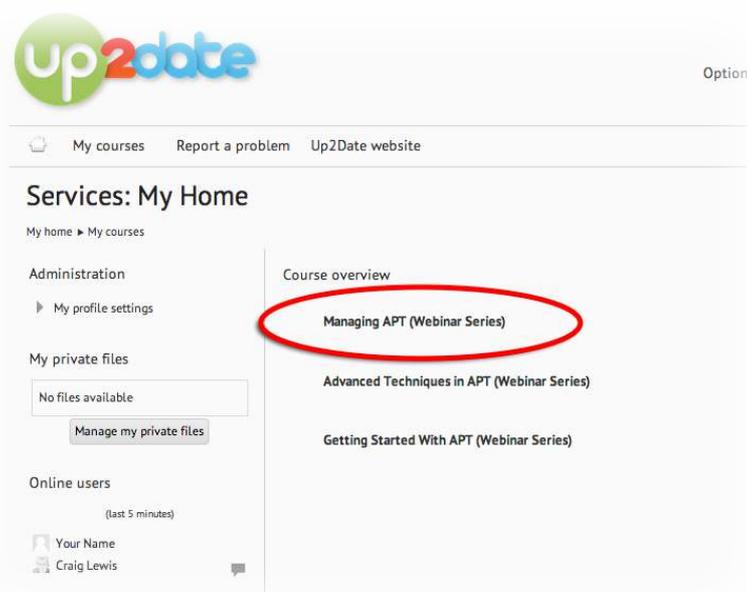
Rachel - Just to clarify the cloud updates automatically doesn't it?

Yes it does. That's one job you can forget about when using the cloud service.

Thanks for your questions everyone.

Craig Lewis

PS. If you are new to our webinars, you should have received your login details this morning by email. To access the recordings from last night, go to our website (www.up2date.org.nz) and log in in the top right hand corner. Enter your username and password (all in lowercase), and once logged in, click on Managing APT (Webinar Series) in the righthand panel.



Last night's webinar is then listed in the left hand panel, and the recordings in the right. Please let me know if you have any difficulties.