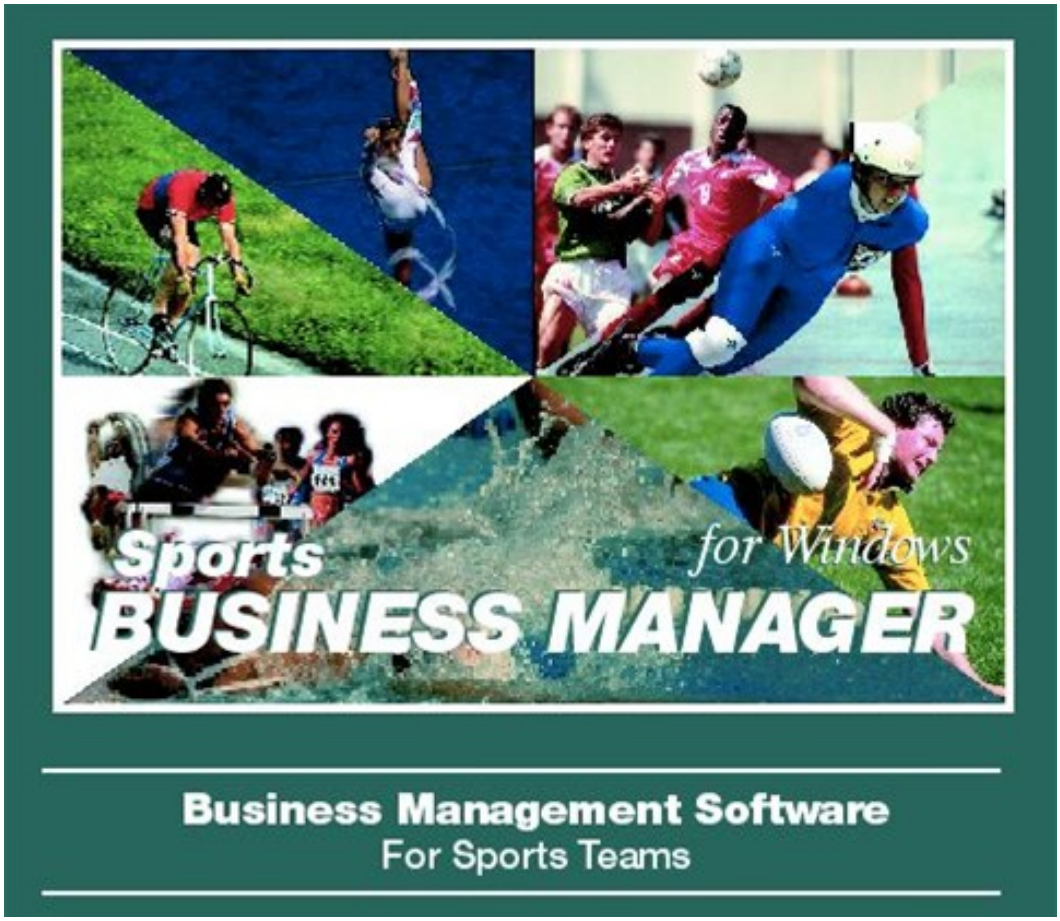
Sports BUSINESS MANAGER

by

HY-TEK LTD
Sports Software

- User Guide -



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Introduction

HY-TEK Sports Software

part of active NETWORK

Welcome to HY-TEK's **Sports BUSINESS MANAGER** ***for Windows*** (**SportsBM**) - the finest in sports finance management software. **SportsBM** has been designed to provide the very highest level of functionality for coaches, parents, boards of directors, bookkeepers, secretaries, and volunteers. But the #1 goal of the design team was to make **SportsBM** easy to use and **Very INTUITIVE**!

What To Do First

After you have installed **SportsBM**, click How to Get Started**,** including how to **convert** your **DOS-BM** Database over to the new **SportsBM** format. Click Here for information on how to convert your **DOS-BUSINESS MANAGER** Database to the new **SportsBM** format.

Hardware Required to Run SportsBM

SportsBM is designed to run on any PC compatible computer with a minimum speed of 300 MHz and at least 64 MB of RAM. HY-TEK recommends using a **1 GHz PC or faster** with **128 MB of RAM** or more.

Software Required to Run SportsBM

SportsBM is a true Windows 32 bit application and runs on any of the following Operating Systems - Microsoft's Windows 98, Windows NT, Windows 2000, Windows ME, Windows XP, or Vista.

How To Get Help

There are a number of ways you can get answers to your questions and/or problems.

SportsBM Product Help

The fastest and easiest way to get answers to your questions is to use the **SportsBM** Help included with your product. The Help section provides simple to follow instructions on "How to" accomplish specific tasks that you will be performing as you use **Sports BUSINESS MANAGER** to manage your team's financial management tasks. Click on **Help** from the **SportsBM** Main Menu Bar as shown below.

When you click on **Help**, there will be a number of choices. Click on **Contents** to display the Help Introduction screen. You can "**minimize**" this screen so that it will always be available on the your Windows Task bar and you can "**resize**" and "**position**" it on your desktop as you wish.

Now click on **Index** and enter a **key word** or **part of a key word**. For example, suppose you wish to find out specific information about entering an athlete into your Database. Just enter "**Athlete Browser**" as the key word, and the **SportsBM** Help will display the topic "Add an Athlete to an Existing Account". Click on that topic, and the **SportsBM** Help will display the particular help screen that discusses that topic.

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Tech Support

Please click Here for information on how to contact Tech Support.

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License Agreement

Copyright

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Copyright Information

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License, Copy, and Use Restrictions

The licensed name is printed at the top left of all reports, is shown when you click on **Help** then **About**, and is displayed at the bottom left of the Main Screen.

HY-TEK Sports Software offers one type of product License for **Sports BUSINESS MANAGER** ***for Windows.***

1. **Team, or Club, License**
   SportsBM is licensed to a "**Sports Team or Club**", **not** to individuals or organizations. **SportsBM** may be used for administrative and performance tasks associated with that team and on any computer that is used by and for that team.

HY-TEK Sports Software licenses (not sells) this single user software to the Sports Team or Sports Organization that is printed on the top left of all reports and displayed on the product Logo/Introduction Screen for use on multiple computers for which the software was designed. This means **HY-TEK Sports Software** allows you to use the software on multiple computers at the same site for the same sports team. **This software can only be used by the sports team to whom it is licensed.**

Specific Restrictions: The single user software may NOT be distributed to teams or schools within a league or sports organization. If the software is licensed to a High School or College, it may NOT be used by the age group team unless the age group team name is included in the License Name. If the software is licensed to an age group team, it may NOT be used by the High School or College team unless the High School or College team name is included in the License Name. The License Name is printed on the top left of all reports and displayed on the SPORTSBM Main Menu logo screen.

If the software is licensed to a **League** or **Sports Organization**, that software may only be used by one person on one computer to maintain all of the league transactions.

You may make no more than one (1) additional copy of the original CD that the software is delivered on for back-up purposes and you may install the software on a hard disk on your authorized computers as a working copy.

You may not make any changes or modifications to the software, or delete any of the files contained in the software, and you may not decompile, disassemble, or otherwise reverse engineer the software. This software is not for sale, and you may not sublicense, rent, lease, donate, sell, loan, pledge, transfer, or distribute on a temporary or permanent basis the original copy or back-up copies of the software or the documentation to another user or company.

LIMITED WARRANTY

This product is warranted that the magnetic media that the software is recorded on and the documentation provided with it are free from defects in materials and workmanship under normal use. The software is warranted that the software itself will perform substantially in accordance with the specifications set forth in this User Guide provided that the data itself is either **keyed in** using this

product's data entry screens, or **imported from any other HY-TEK Sports Software product database**.

HY-TEK Sports Software will replace the installation CD that proves defective in materials or workmanship, without additional charge, on an exchange basis within 30 days of having shipped the CD. If a CD media problem is reported after this 30 day period, **HY-TEK Sports Software** will replace the CD according to its standard Disk Replacement policy in which you would remit to **HY-TEK Sports Software** the CD replacement costs of $10.00 plus the S&H costs. In the case of an error in the documentation, **HY-TEK Sports Software** will correct errors in the Help section of the product without charge and provide updates as required that reflect these Help section changes.

HY-TEK Sports Software will either replace or repair without additional charge any software that does not perform in substantial accordance with the specifications of the documentation. This will be done by your downloading the current update from the **HY-TEK Sports Software** web site at www.hy-tekltd.com, assuming you're on the current released version of the software. If you are not on the current released version of the software, you may receive a corrected version by remitting the standard **HY-TEK Sports Software** product update fee.

HY-TEK Sports Software does not warrant that the functions contained in the software will meet your particular requirements or that the operation of the software will be uninterrupted or error free. The warranty does not cover any media or documentation that has been subjected to damage or abuse by you. The software warranty does not cover any copy of the software that has been altered or changed in any way by you or others. **HY-TEK Sports Software** is not responsible for problems caused by changes in the operating characteristics of the computer hardware or operating system which are made after the delivery of the software.

Except as specifically provided herein, **HY-TEK Sports Software** makes no express or implied warranties whatsoever and expressly disclaims the implied warranties of merchantability and fitness for a particular purpose. These warranties shall be in effect two years from the time the original software or product update is delivered.

Your Obligations Under the Warranties:

During the warranty period, you must contact **HY-TEK Sports Software** customer service department for an authorization to return any defective item to **HY-TEK Sports Software**. If **HY-TEK Sports Software's** customer service representative is unable to correct your problem, you will be provided a return authorization number and an address for returning the defective item for warranty service or replacement. You must insure any defective item being returned since **HY-TEK Sports Software** does not assume the risk of loss or damage while in transit.

LIMITATION OF LIABILITY

HY-TEK Sports Software shall not, in any event, be liable for special incidental, consequential, indirect, or other similar damages, even if **HY-TEK Sports Software** or its distributor has been advised of the possibility of such damages. In no event shall **HY-TEK Sports Software's** liability exceed the licensee fees paid for the right to use the licensed software or $200.00, whichever is less.

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Install Sports BUSINESS MANAGER

There are two ways to install **Sports BUSINESS MANAGER**. You can install using a HY-TEK CD that you receive in the mail or you can install electronically from the HY-TEK Sports Software web site using HY-TEK's web delivery system. Select the appropriate topic below for complete information about installing Sports BUSINESS MANAGER.

Installing Sports BUSINESS MANAGER from a CD
Installing Sports BUSINESS MANAGER using Web Delivery
How to Re-Install Sports BUSINESS MANAGER
How to Setup a Desktop Icon or Shortcut
How to Uninstall Sports BUSINESS MANAGER
Installing Users Under Administrator in XP SP2

Installing Sports BUSINESS MANAGER from a CD

Installing Sports BUSINESS MANAGER using the HY-TEK CD

You install **Sports BUSINESS MANAGER** just as you would any Windows product using Windows Installer. From your Windows desktop, click on **Start** and then **Run** and key in the CD drive letter followed by **:Setup**. For example if your CD is Disk Drive D, enter **D:Setup**.

NOTE: If you have the Windows AutoRun turned on, Windows will automatically read the CD and begin the installation process and you will not have to type in D:Setup.

The HY-TEK Sports BUSINESS MANAGER Installation software will guide you through the installation process. When asked for a directory/folder name to use, HY-TEK recommends that you use the default installation folder/directory name of "**Hy-Sport\SportsBM**".

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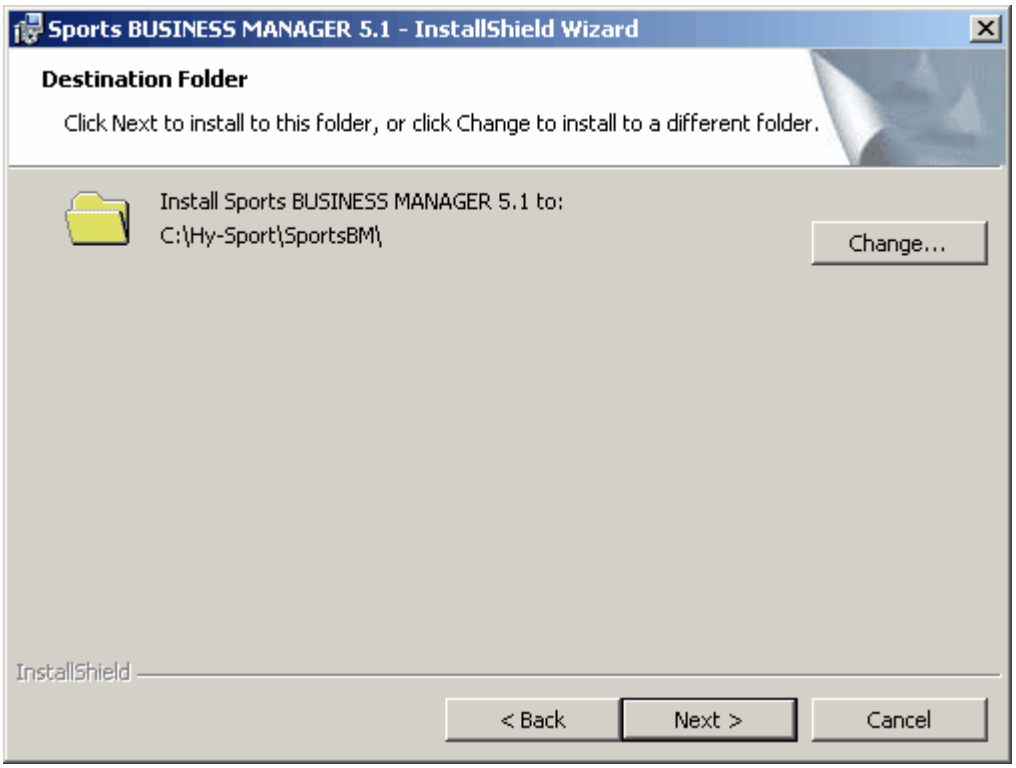

After the Installation process is complete, you may be asked to restart Windows in order to register some Windows System files. DO NOT remove the CD. Now click **OK** to restart Windows.

Read the License File From the CD

After Windows has completed its restart, re-insert the CD (if you have removed it) and cancel at the first opportunity if it starts to install again. Click on the **Sports BUSINESS MANAGER** icon on your Windows desktop. The first thing that **Sports BUSINESS MANAGER** will do the very first time it is started is to read the License file from the CD. Once this is completed, the Main Menu will be displayed. Open an initial database by clicking **File / Open / New**, type in a database name and click **Open**. You may remove the CD and you will not need it again unless you need to re-install for some reason.

Installing Sports BUSINESS MANAGER using Web Delivery

When ordering **HY-TEK's Sports BUSINESS MANAGER**, you can elect to have **Web Delivery** of the software. What this means is that you will download the setup.exe for installing Sports BUSINESS MANAGER from the **HY-TEK Sports Software web site**. This is the same setup.exe that you would receive on a HY-TEK CD. You will receive an Email that details the steps to accomplish the installation.

If your license name was Dolphin Swim Team for example, you would recieve an Email delineating the steps for the Web Delivery.

The Email would have a **link** that said click **Here** to download the required setup.exe. Then you would do the following:

1. Upon clicking the link, you **Save** the exe to your DeskTop or other location where you can find it. **Note:** Should you have trouble downloading the setup.exe, you can type the following into your browser: http://www.hy-tekltd.com/WebDelivery/BM5/setup.exe

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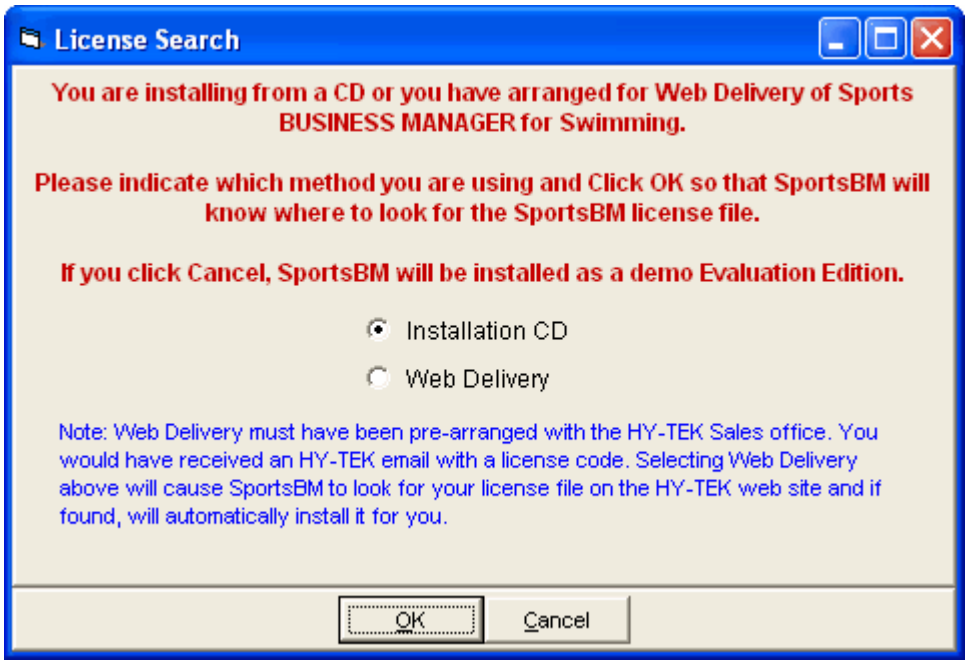
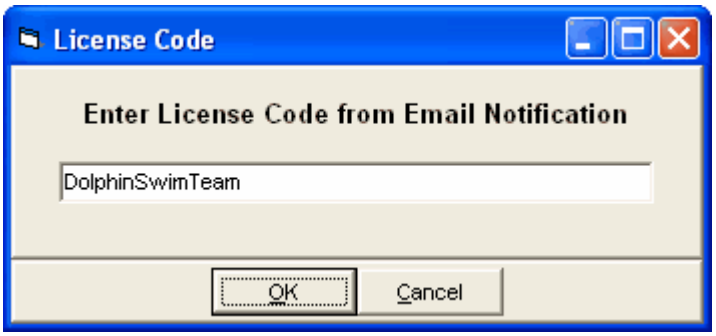
2. After the setup.exe is downloaded, you **Open** the downloaded exe or double click the exe to start installation.
3. After the program is installed, you start Sports BUSINESS MANAGER and the program will bring up a window asking whether you are installing by CD or Web Delivery.



4. Select Web Delivery and another window will apprear asking for a code.



5. In this example, the Email would tell you to enter this code: **DolphinSwimTeam**, and click OK.

The HY-TEK web site would be searched for your license and if found will download and install it. At this point you would be ready to use Sports BUSINESS MANAGER.

Note: Should you have trouble connecting to the HY-TEK web site, you may need to turn off your firewall.

After installation is complete, you can click **Help / About** at the top of the Main Menu to verify your license and options.

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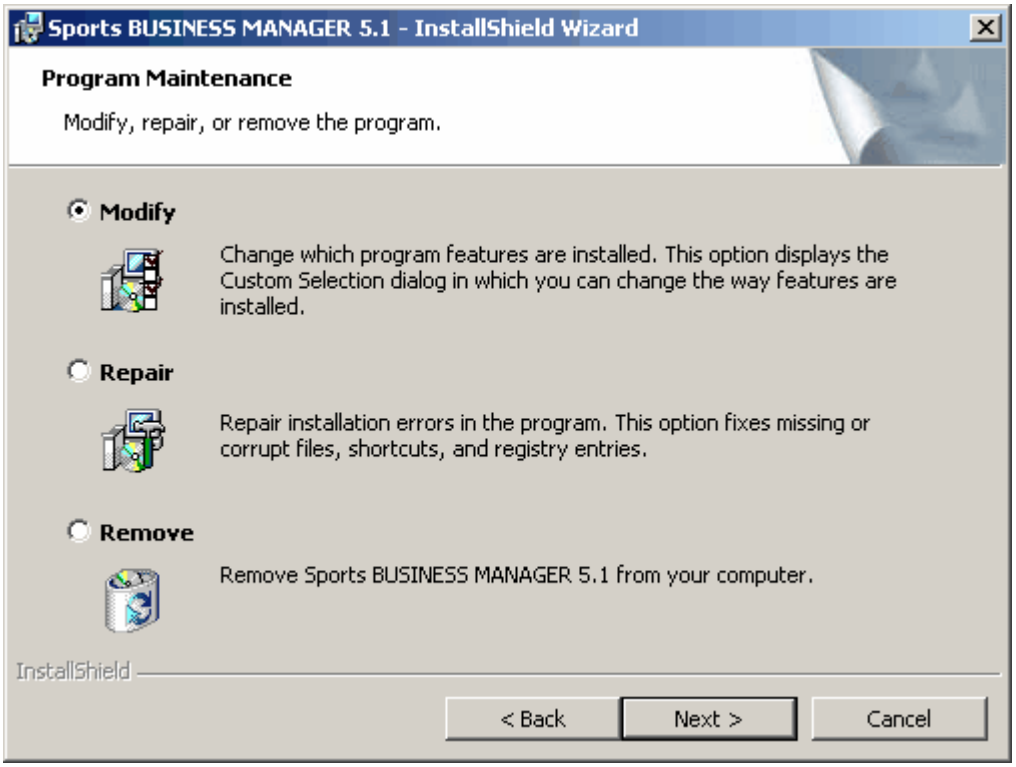
How to Re-Install Sports BUSINESS MANAGER

How to Re-Install Sports BUSINESS MANAGER

If you receive a new CD from HY-TEK or wish to re-install Sports BUSINESS MANAGER from your original CD, you would proceed just as if you were installing it for the first time. From your Windows desktop, click on Start and then Run and key in the CD drive letter followed by **:Setup**. For example, if your CD is Disk Drive D, enter D:Setup. Windows Installer will check to see if Sports BUSINESS MANAGER is already installed on your computer. If it is, the following screen will be displayed.



HY-TEK recommends you accept the defaults on this screen as well as the next Custom Setup screen to re-install SportsBM from your CD.

How to Setup a Desktop Icon or Shortcut

How to Setup a Desktop Icon or Shortcut

When you install Sports BUSINESS MANAGER, the installation process automatically sets up a SportsBM icon on your desktop as a shortcut. But if the installation process fails to set up an icon due to various Windows settings, you may want to set up a desktop icon shortcut yourself. To set up a SportsBM icon on your desktop, start **Windows Explorer**, pick the installation directory (the default is c:\Hy-Sport\SportsBM), find the **SportsBM.exe** file and right mouse click on it and choose **Send To** and **Desktop (Create Shortcut)** as shown below. Then you can right mouse click on the desktop icon just created and choose **Rename** to name the shortcut anything you wish.

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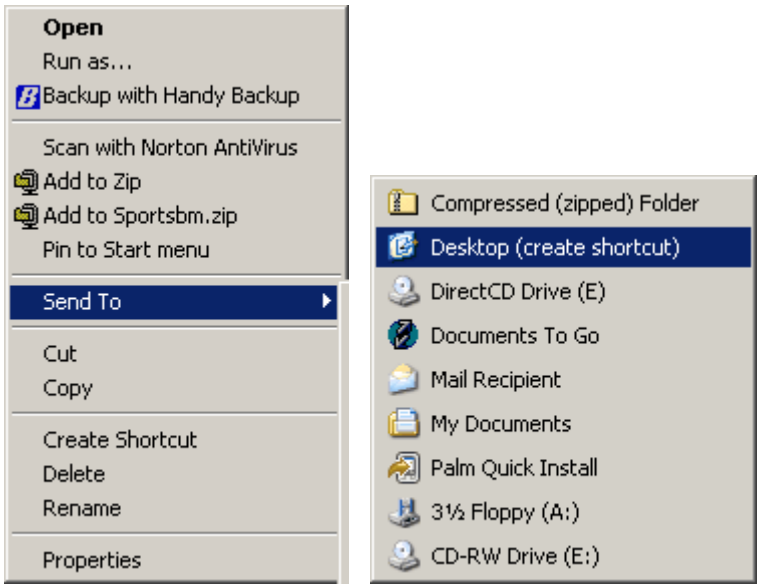

How to Uninstall Sports BUSINESS MANAGER

How to Uninstall Sports BUSINESS MANAGER

To **Uninstall** Sports BUSINESS MANAGER, please use the standard Windows **Add or Remove Programs** feature included with your Microsoft Windows product. For most Windows releases, click on **Start**, **Control Panel**, and then click on **Add or Remove Programs**. Select Sports BUSINESS MANAGER from the list and click **Remove**.

How to Give Permissions to Users

If you are the Administrator installing Users in XP SP2, you must give users permissions to use certain folders on the hard drive, otherwise the users will log-in and get permission denied errors when trying to run SportsBM. Log-in as Administrator and using Windows Explorer or My Computer, right click on each folder listed below, click Security and give full control of the folder to any user on the users list.

MM requires access to the following folders:

- hy-sport\sportsbm (this is where MM is normally installed)
- sportsbmdata (and any other folder used for the database)

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System Requirements

Computer Hardware:

Minimum: Any 300 MHz Pentium, Celeron, or AMD class computer or faster with 64 MB RAM.

Recommended: Any 1 GHz Pentium, Celeron, or AMD class computer or faster with 128 MB RAM.

Any Macintosh computer that will run Microsoft's Windows 98, Windows NT, Windows 2000, Windows XP, or Windows Vista using **Hardware** or **Software Emulation**. Click on Running HY-TEK on Your Mac for detail information.

Note: If you are running the **Pro Option** with the Network feature, then you will need a Network card in each computer as well as appropriate Fast Ethernet cabling among the computers being used. Or, you can setup a wireless router with the appropriate wireless card in each computer being used. HY-TEK recommends using the fastest computer for the computer that contains the SportsBM Database.

Software: Microsoft's Windows 98, Windows NT, Windows 2000, Windows ME, Windows XP, or Vista.

Printer: Any Windows supported printer. Dot-matrix printers are not recommended for reports.

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Evaluation Edition

The **Evaluation** or **Demo** copy of **SportsBM** contains all the Standard Options as well as all of the functionality of the Production version, but has the following limitations:

- Only 10 accounts
- Only 20 athletes
- Only 20 checkbook transactions
- Emailing Invoices to the first 3 accounts

Click Here to find out how to contact the Sales Office to order a Production copy of **SportsBM.**

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SportsBM Product Options

Sports BUSINESS MANAGER *for Windows* (SportsBM) is available in a Start-Up version with no options. You may add up to 4 options. The **options** may be ordered to support the different needs of your sports programs. To find out what options are included in your **SportsBM** release, click on **Help**, then **About**, and **SportsBM** will display the options that were shipped with your product.

- **QuickBilling Option** - once your fee structure is set-up, monthly billing of several hundred athletes becomes incredibly quick and easy.
- **Checkbook Option -** balances your checkbook and allows you to categorize all payments and deposits for easy to read business reports, including payroll reports.
- **Email Invoices** - Save money and time by Emailing your invoices directly to your Accounts.
- **Pro Network -** allows several computers to simultaneously share one common Database.

If you need any of these options, click Here for information on how to contact the HY-TEK Sales Office.

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Getting Started - Overview

Sports BUSINESS MANAGER ***for Windows*** (**SportsBM**) has been designed to enable coaches, boards of directors, sports team owners, administrators, secretaries, and bookkeepers to effectively and easily manage the financial affairs of a sports team. Although the software employs sophisticated database concepts, **Sports BUSINESS MANAGER** is designed for the non-user of computers.

The major feature of **SportsBM** is its ability to send your members one invoice which keeps five separate accounts for each family: dues, entry fees, travel fund, taxable sales, and non-taxable sales. Your members write one check! You need only one checking account instead of three! Additionally, the system gives you the ability to establish an escrow amount (a credit balance amount) for each family's entry fee account and to hold in escrow any credit balances in any of the other four accounts, such as in the travel fund account.

Printing and mailing invoices is a major task for most teams, but **SportsBM** can make this task simple and fast. The specially designed invoice contains the mailing address and return address so that you can fold it and place it in a double window envelope for mailing. No need for labels, pre-printed envelopes, or pre-printed invoice forms. **SportsBM** does, however, have an excellent mailing label printing utility.
Sports BUSINESS MANAGER is designed to handle any size team, whether operating from one facility or several facilities. In fact, if your team participates at 10 different locations, **SportsBM** gives you the capability to keep the 10 or more locations separate for billing purposes, address lists, attendance lists, and all other reports. You may enter an unlimited number of accounts/families and athletes as well as an unlimited number of transactions into the system. **SportsBM** will let you change or look up your data quicker than you ever believed possible. In addition, for Swimming and Track & Field teams, you can easily move data between all HY-TEK products, such as MEET MANAGERS and TEAM MANAGERS.

One optional feature of **Sports BUSINESS MANAGER** is its **QuickBilling** capability. Once your fee structure is set-up, monthly billing of several hundred athletes becomes incredibly quick and easy. Another optional feature is the **Checkbook Option**, which balances your checkbook and allows you to categorize all payments and deposits for easy to read business reports, including payroll reports. And the **Email Invoices** option is a real money-saver - no more stamps and envelops.

If you are the owner or manager of the team, keeping up with the day-to-day financial progress is very important. **Sports BUSINESS MANAGER** has a special feature that enables you to easily monitor the daily operations. At any time, **SportsBM** can print a report of the day's activities, which includes the following:

- Alphabetical list of all financial transactions posted for the day
- Bank deposit summary which includes the amount charged and credited in each of five categories
- Dues
- Entry fees
- Travel funds
- Taxable sales
- Non-taxable sales

By reviewing the daily report at the end of each day, you can quickly "**see**" what is happening with the club.

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About Icons

Icons are symbols that are one click time-savers. These six are the most commonly used icons.

The icons in order are Add, Edit, Delete, Find, Print, Exit Menu. The Function keys **F3** correspond with Add, **F4** with Edit, **F7** with Delete, and **Esc** with Exit Menu.

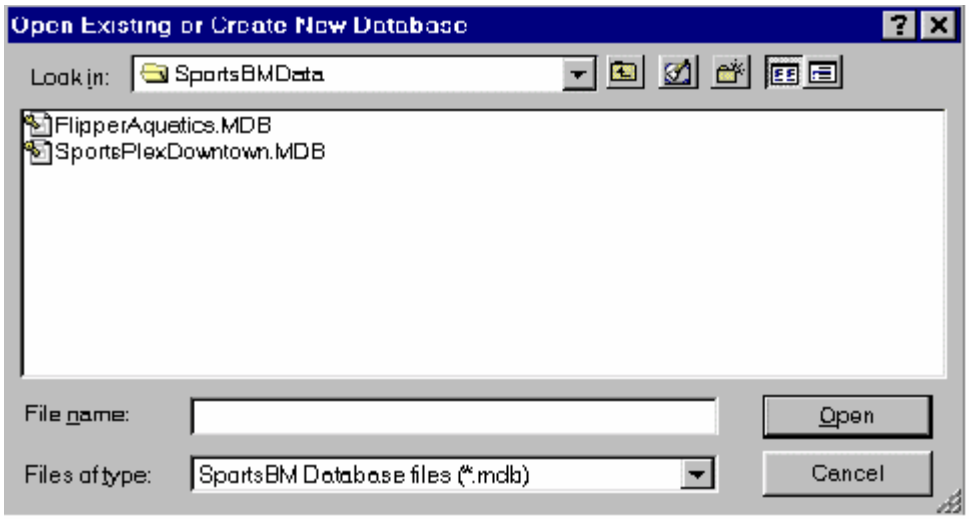
Clicking the dollar icon means display/edit Account Balances.

Starting from Scratch

It's easy and fast to Get Started using the **SportsBM** Set-Up and Customization features. Here is a basic **step-by-step** procedure for getting started, assuming **you do not have a Database** set up yet for your organization.

Step 1: Open and Customize your Database Set-Up

Click on **File** then **Open/New** and type in the desired name of your new Database in the **File Name area**, and click on **Open**.



After you Open a **New** Database, **SportsBM** will automatically route you to the **System Preferences** screen so that you may customize a number of parameters that will be used by **SportsBM** in setting up your Database.

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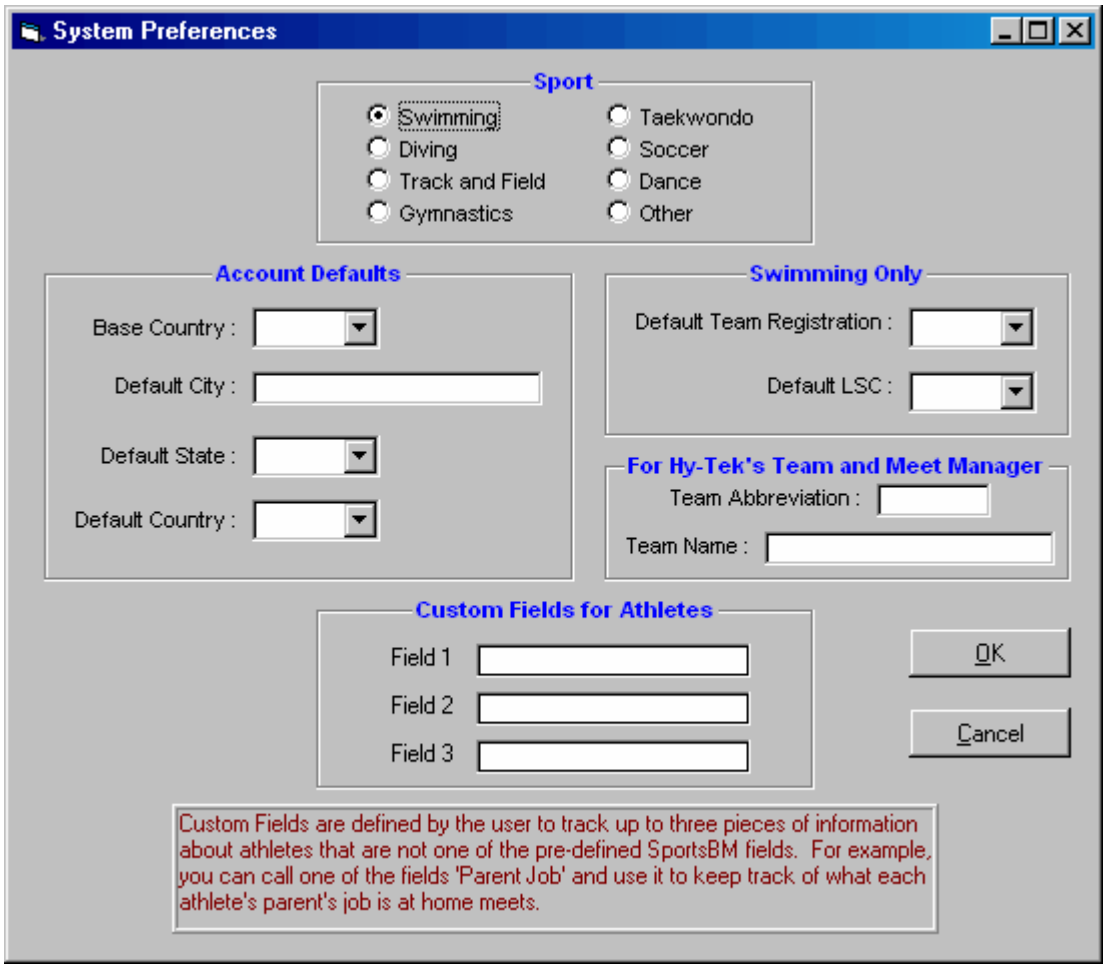

The Default Team Registration, Base Country, Team Abbreviation, and Team Name are required. If your Default Team Registration is USS, the Default LSC is also required.

Step 2: Facility and Invoice Setup

From the Main Menu Bar, click on **Setup / Facility and Invoice Setup.**

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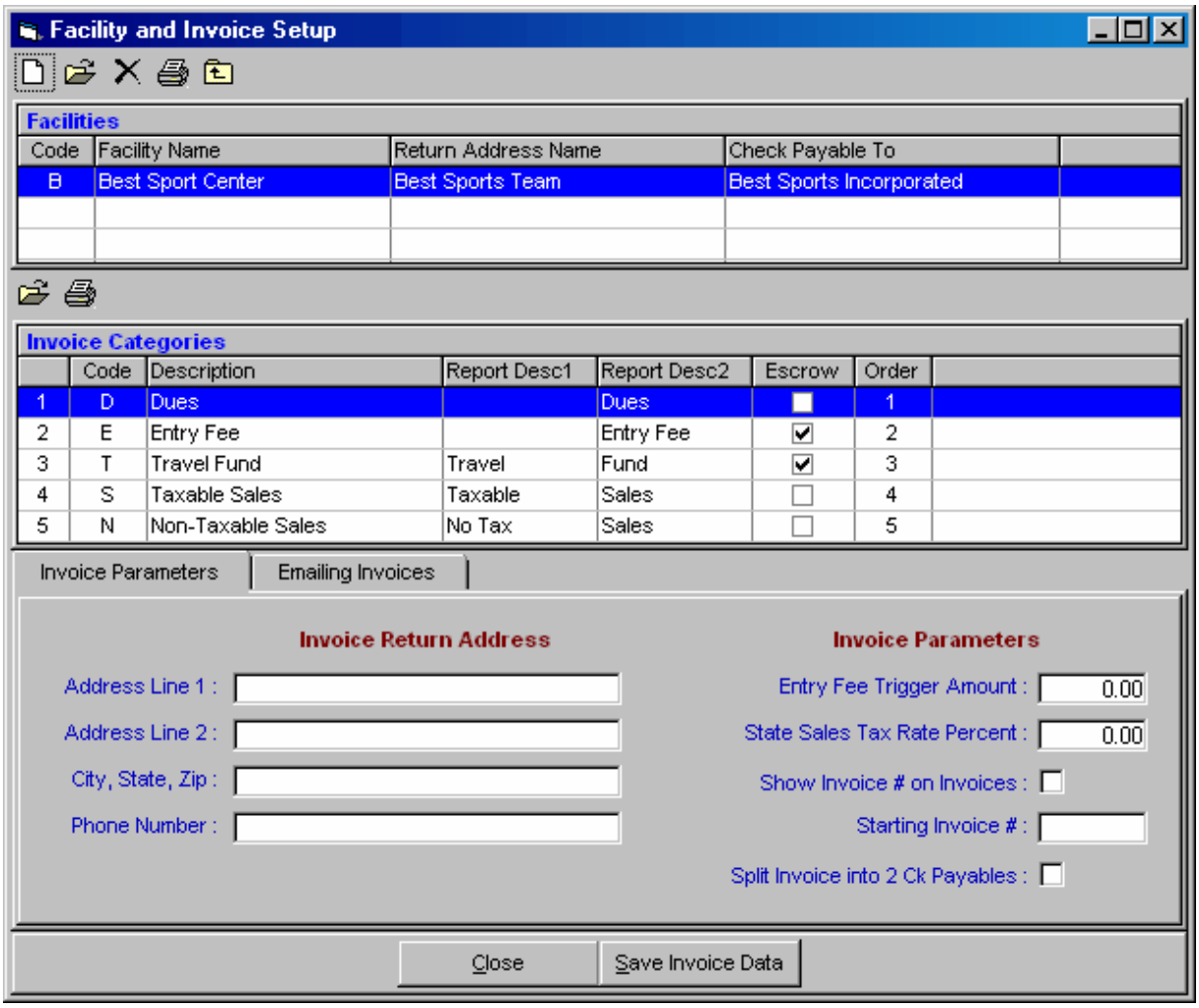
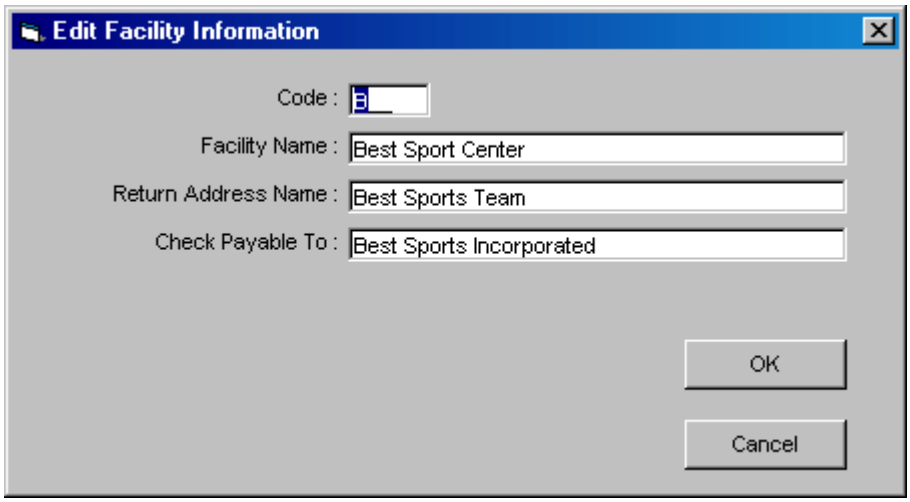


Click on the **Edit** Facility icon, and the following screen will appear.



Change the text fields to match your team. All fields are mandatory. The Code can be up to 3 characters. The Facility Name can be up to 23 characters while the Return Address and the

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Check Payable lines both take up to 30 characters. To add more facilities, click the Add Facility icon.

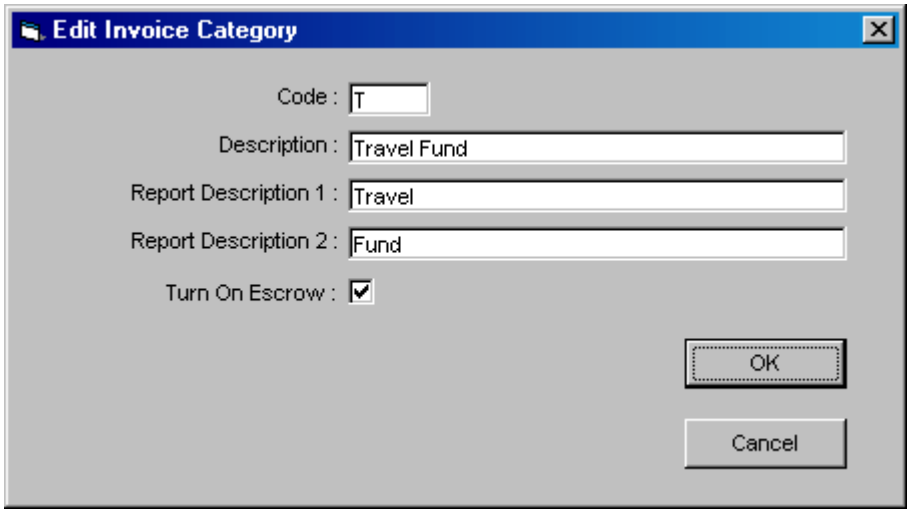
Invoice Categories

The invoice categories default to the choices shown on the screen below.

Invoice Categories

	Code	Description	Report Desc1	Report Desc2	Escrow	Order
1	D	Dues		Dues	☐	1
2	E	Entry Fee		Entry Fee	☑	2
3	T	Travel Fund	Travel	Fund	☑	3
4	S	Taxable Sales	Taxable	Sales	☐	4
5	N	Non-Taxable Sales	No Tax	Sales	☐	5

To edit any of the Invoice Categories above, click on the **Edit** icon or double click one of the rows. Before making any changes to these categories, think through what your major categories should be. **Note: You cannot change the order, and you cannot add more invoice categories.**



The Report Descriptions are for column headers. To understand how Entry Fee Escrow works, go to Add or Edit Accounts/Athletes.

Step 3: Report Preferences

From the Main Menu Bar, click on **Setup / Preferences / Report Preferences**. Type in Report Headers and punctuation choices. Select your printer for reports and labels.

Step 4: Groups and Subgroups

From the Main Menu Bar, click on **Setup / Groups and Subgroups**. Names for Groups and Subgroups are used for various reports and **QuickBilling**. Click Here for more information on Groups and Subgroups.

Step 5: Accounts

From the Main Menu Bar, click on **Accounts**.

- Add Accounts
- Add Athletes to each account.

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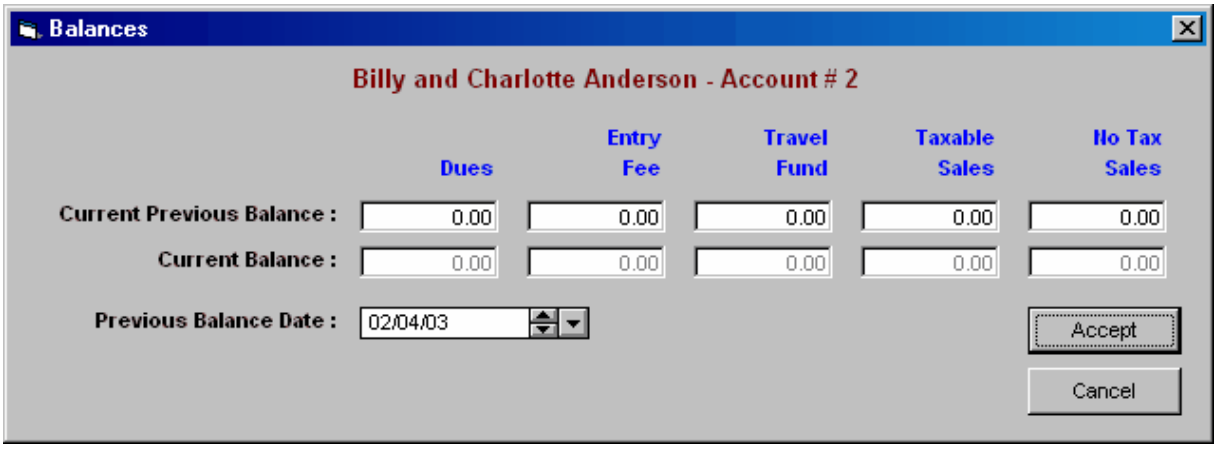
Step 6: Enter Start-up Previous Balances

If there are any Start-up Previous Balances, go to **Accounts** and click **Transactions** at the top. Select any account and then click the **Dollar Sign** icon. When you start using SportsBM, many of the accounts that you enter will already have a current balance due. In order to transfer accounts from your previous accounting system to SportsBM, you will need to enter the account balances and the effective date of those account balances for each account. A minus amount means it is a credit balance.



Step 7: QuickBilling Standard Fees

If you have the QuickBilling option, you will need to setup your group billing matrix which requires that you have already setup your athlete groups. Click Accounts / Quickbilling / Standard Fees and edit any group to enter the amounts to be charged for the 1st through 5th athlete within the same account. For more information, refer to the Quickbilling section.

Step 8: Emailing Invoices

If you have the Emailing Invoices option, go to How to Email Invoices.

Step 9: Checkbook

If you have the Checkbook option, go to the Checkbook Menu.

Convert a DOS-BM to SportsBM

If you were a prior user of DOS Business Manager, then you can convert your DOS BM database to the new **SportsBM** format very easily. From the main **SportsBM** screen, click **File / Convert DOS Business Manager Database**. SportsBM will then display a conversion screen such as the one below.

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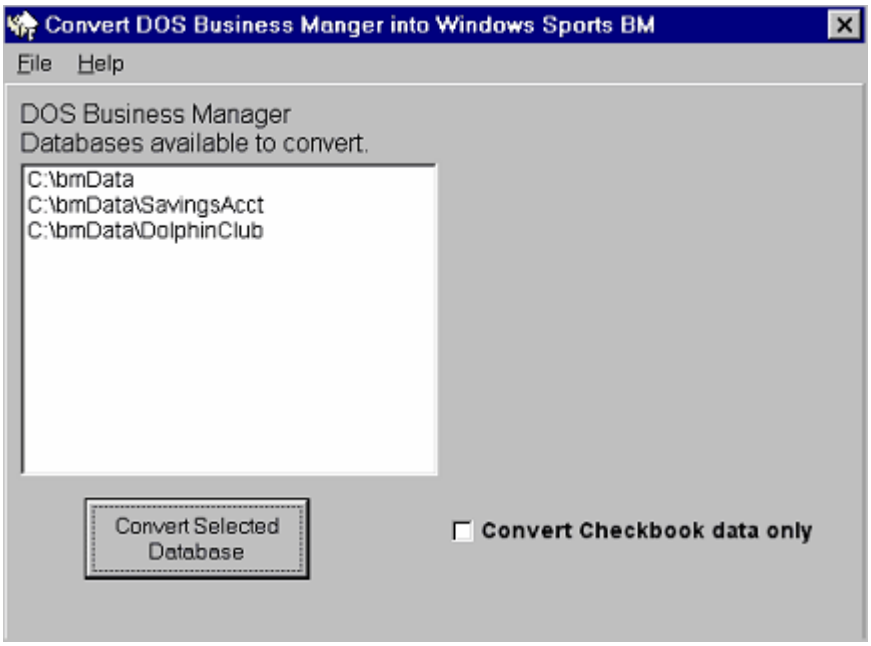
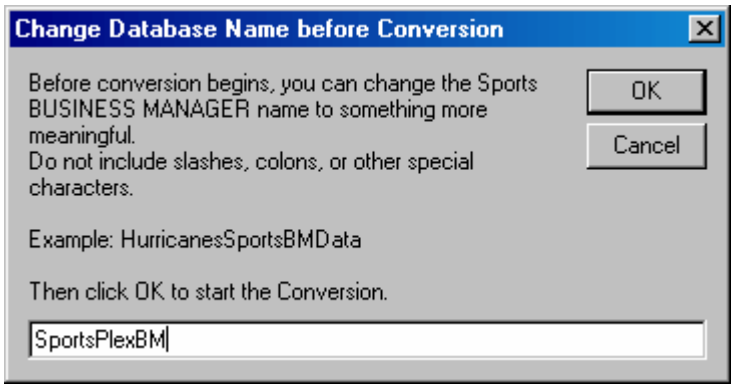


Initially, **SportsBM** will search c:\bmdata for DOS BM databases and list all of them in the window. Normally you would only have one database, but in the example above, it found 3 databases. Using your cursor, highlight the desired DOS BM database, click the **Convert Selected Database** button and SportsBM will display a screen enabling you to change the name of the database.



After changing the database name, click OK and the DOS BM database will be converted in a matter of seconds into a **NEW** database. If there was a currently open database, it is not over-written. Once the entire conversion has been completed, **SportsBM** will give you an **OK** button and will then take you to the System Preferences screen where you must verify some basic information such as Base Country and Team Registration Type. Upon completing the System Preferences screen, you are taken back to the main screen where the newly converted database will be open. You can click Accounts to quickly verify the account and athlete information.

NOTE: If you have **Archived Transactions** in your DOS BM database and if you want that history data to be included in the conversion, you must use DOS BM to import and merge those archived files back into your DOS BM database before converting to SportsBM. To do that, start DOS BM, go to Transactions and select number 7 for Archive Menu and then select number 2 for Import Archived File.

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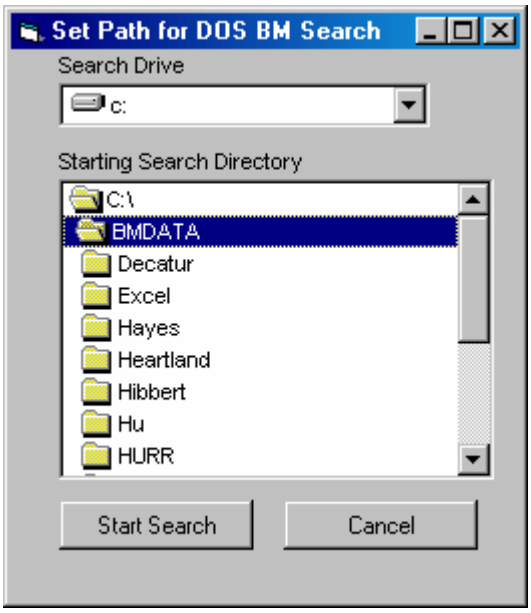
Your DOS BM Database Is Not in C:\BMDATA

If the Convert DOS Business Manager window is blank, it means **no** DOS BM databases were found in c:\bmdata and your DOS BM database must be in a different folder or must be on a different computer.

If you wish to request that **SportsBM** look on a different folder or different Hard Drive for DOS BM Databases, from the main screen, click **File** / **Convert DOS Business Manager Database** and then click on **File** from within that windows. Now click **Search for DOS Business Manager**.

You can pick a different directory or even a different hard drive.



If you wish **SportsBM** to search your entire hard drive, double click the **C:** root drive and then click **Start Search**. To search a different Drive letter, select a different drive from the **Search Drive** drop down combo box. Searching an entire hard drive will take several minutes, so it is better if you know in what directory your DOS BM database is located and simply search that one directory (which will also search all of its sub-directories).

After the search is completed, pick from the list of DOS BM Databases that are displayed and then click on the Convert Selected Database button.

SportsBM and DOS BM Database are on Different Computers

If your DOS BM Database is located on a computer other than the one where **SportsBM** is installed, run DOS BM on the other computer, go to the Maintenance Menu and select #4 to Rebuild Lists. Then select #1 to Backup the database to a floppy diskette. Take this diskette to the SportsBM computer.

With the backup diskette in Drive A of the **SportsBM** computer, and from the main screen of **SportsBM**, click on **File** / **Convert DOS Business Manager Database**. From there, click **File** and

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then click **Convert DOS Business Manager Backup.**

Select the A drive and double click on the backup file named hybackup.zip. SportsBM will then restore your DOS BM backup to a temporary directory and then proceed with the Database conversion as described in the previous sections.

Convert Checkbook Only

Note that you can convert the Checkbook data independently of the account, athletes and invoice transactions. To do this, check the **Convert Checkbook data only** check box before clicking Convert Selected Database. You have to have a database already open to convert the checkbook data because this conversion is a "merge" rather than a create new database. Therefore, the Checkbook Only conversion, deletes the checkbook data in the currently open database and then converts the DOS BM checkbook portion and merges it into the currently open database. This is useful in a case where you have already started you regular SportsBM process and then decide later to re-convert the checkbook portion to start over. Or maybe the checkbook portion is in a different DOS BM database.

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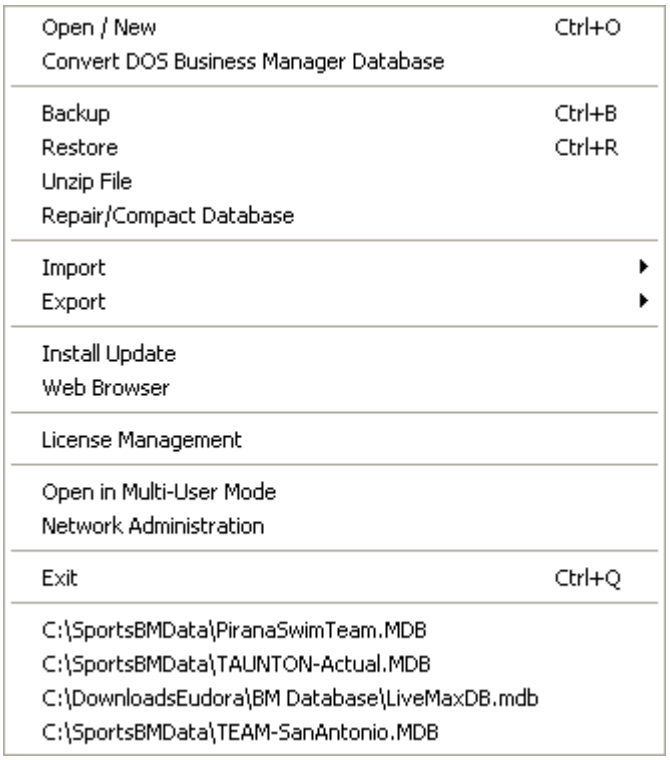
File Menu

At the top of the Main screen for Sports BUSINESS MANAGER, you have the Main Menu bar:

From the **SportsBM** Main Menu Bar, click on **File** to get a list of **SportsBM**'s file management and utility features. Each of these functions is important in managing the database and making use of various utility features that will make your job easier.



Open/New

Open a NEW Database

Immediately after installing **SportsBM** for the first time, no data is open and no database has been created. You must start a new database using the "Starting a New Database" instructions below.

Starting a New Database: If you wish to create a New Database, click **File/Open/New** and type a new Database name in the text box for **File name**, and **SportsBM** will create a database with that name and will take you through the initial Set-Up for System Preferences. For readability, use upper and lower case and give meaning to the database file name such as "Dolphins **SportsBM** Database". There is a limit of 50 characters for the database name.

When you start **SportsBM** from your Windows desktop, **SportsBM** will automatically Open the last database that you used. But if you click on **File** from the Main Menu Bar, **SportsBM** will display, just below the word Exit, a list of the 10 most recent Databases that have been opened. As a shortcut, just

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click on the one that you want, and **SportsBM** will Open it for you.

If you do not see the Database that you want to open on **SportsBM**'s "most recent" list, click on **Open/New,** and **SportsBM** will display the standard Windows file directory lookup screen. **SportsBM** will default to the **SportsBMData** directory/folder and list any Databases that it recognizes. If you still do not see the one you are looking for, pick another disk drive and directory/folder, and **SportsBM** will display the list of databases that it finds in that particular directory/folder.

Open a Database That Was Previously Created

Click on **File** and at the bottom of the File pull-down menu window, SportsBM will show a list of the **last 10 SportsBM databases** that have been opened. Just click on the one you wish to open, and SportsBM will do the rest. If you wish to open a database that is not on the most recent list, click on **Open/New**, and SportsBM will display a standard Windows directory screen. SportsBM will default to the directory name **SportsBMData** - we suggest that you keep all of your SportsBM Databases in this directory.

SportsBM will display a list of the SportsBM Databases that have been previously created. Pick the one you wish to open and then click on the **Open** button. SportsBM will open that Database and return to the SportsBM Main Menu.

Convert Database to SportsBM

Click Here for detail information on Converting a DOS BM database to the SportsBM format.

Backup a Database

Backing up a database means making a copy of the database in zipped format on a diskette, zip drive, CD, or your hard drive. **Note**: If you are using a CD-RW for Backup, the CD must first be formatted using your CD-RW software. Backing up your database **is extremely important** because it protects you from the loss of your data from accidental cause or from the malfunction of your hardware. Backing up **only copies data** and does not copy anything that relates to the program itself.

> **For example, if your hard disk goes bad, the only way you can recover your database is from a copy of it made on a disk - specifically made by doing a backup.**

It's easy to backup your database, and it only takes a minute or so. Click on **File** from the Main Menu Bar and then **Backup**, and specify a disk drive and directory where you want the data copied. Directions are listed for the different types of backups, diskettes, and CD-RW, and Zip drives. You may also enter "comments" about your backup to be displayed when the database is restored. For example, you might want to enter the comment:

"***This Backup is for the board and contains current financial information as of May 28, 2003.***"

If and when this backup is restored, any message created during the backup process will be displayed BEFORE the backup is restored.

NOTE: HY-TEK recommends that you perform the important backup function at the end of each day that you enter or change data. If you are using floppy diskettes for backups, three sets of backups should be maintained and alternated - label them Backup A, Backup B, and Backup C. Also, make a backup before each close-out of invoices and store it in a different location from your computer.

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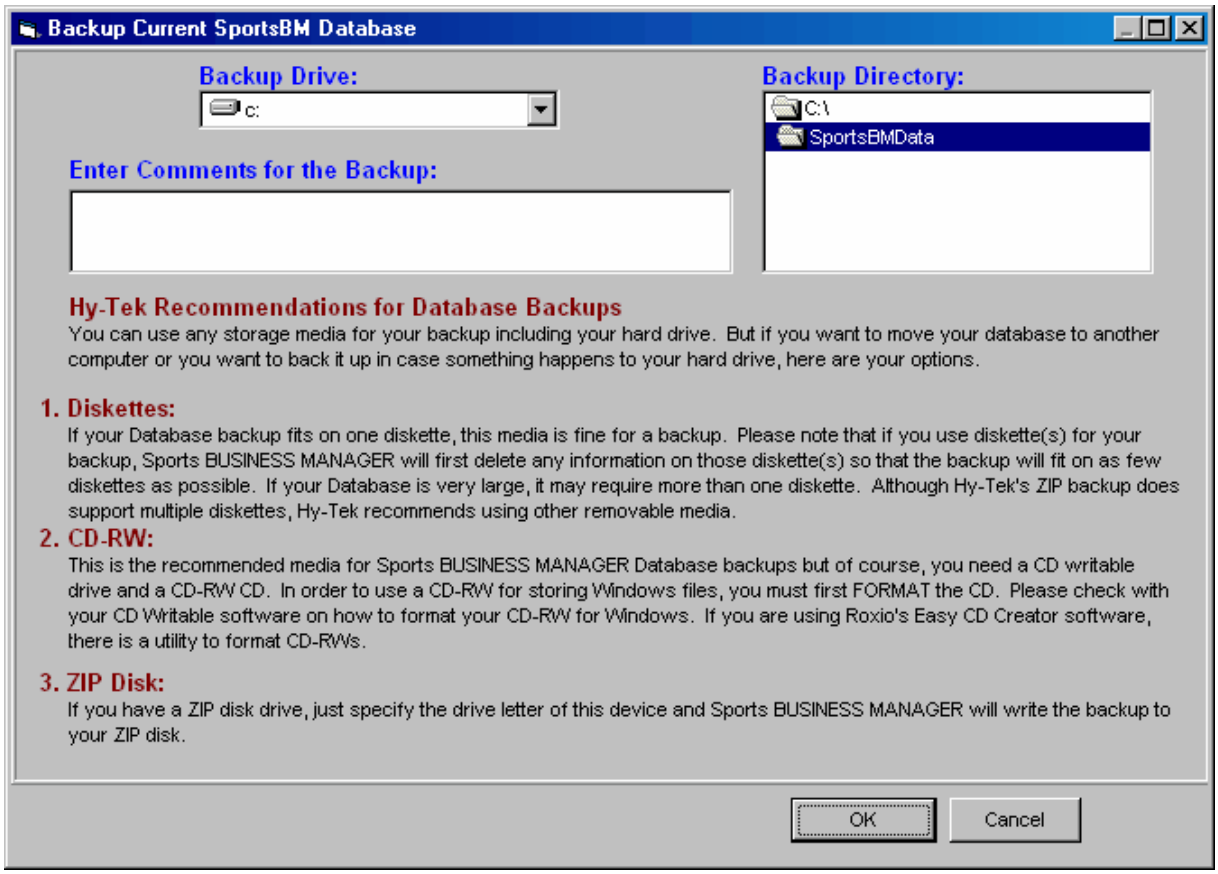

NOTE: If your backup requires more than one 3½ inch diskette, HY-TEK strongly recommends using a ZIP disk or a CD.

Restore a Database

Restoring a database means to copy the database information from a backup disk(s) onto your hard drive. If you wish to Restore a SportsBM database, you **always have to use a set of Backup disk(s)** created from a SportsBM backup process. Please click Here for information on **How to Backup Your Database**.

You may want to restore your database from a previously created backup because:

- You want to set up your database on another computer.
- Your hard drive was bad and you sent it out to be repaired. When it was returned to you, the hard drive did not contain your SportsBM database and now you want to put back your database to continue your work.
- You entered incorrect information into your database and want to go back to a previous point. Rather then deleting the incorrect information, you may want to "restore" your database back to where it was before you entered the incorrect information.

Click on **File** from the Main Menu bar and then **Restore**.

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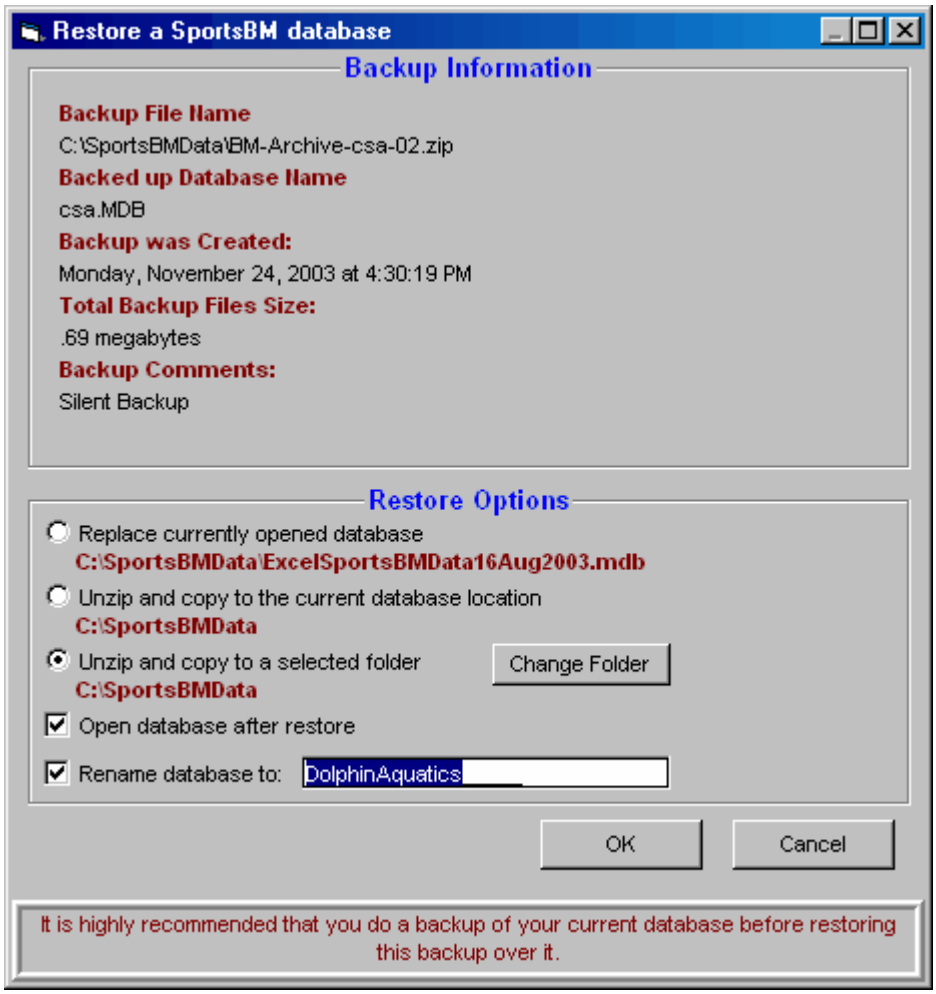

Select your disk drive and if the backup is on disk, put that disk into that drive. **SportsBM** will offer you three options:

1. Replace currently opened Database - default selection.
2. Unzip and copy to currently opened folder.
3. Unzip and copy to a selected folder. This choice is designed for you to restore your backup into another directory/folder so that if **it's the wrong backup or is damaged, you will not wipe out your currently opened database**.

   Warning: If you choose option 1, the information in the database that you have currently opened WILL BE OVERLAID with the information in the Database that is being restored.

If you have selected options 2 or 3, you can automatically open the restored database by clicking on the **Open Database after Restore** check box and you can rename the database if you check the **Rename database to** check box. If you select option 3, SportsBM will ask you to specify a folder (directory) to which to copy the Database.

NOTE: If you receive Dynazip errors during the Restore, it is probably because you are using multiple 3 1/2 inch diskettes that have media errors. You might want to reformat new diskettes and try the backup/restore again. HY-TEK recommends using a ZIP disk or a CD if your database backup does not fit on one 3 1/2 inch diskette.

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Move a Database

Suppose you have setup and entered all the financial account information for your club on your home computer (A) and you wish to take the Database and put it on the computer (B) at your sports facility. Here's how you do it:

1. **Backup** up the Database on Computer A
   Click Here for instructions for Backing up your Database.

2. **Install SportsBM** on your Computer B
   Click Here for instructions for Installing **SportsBM**.

3. **Restore** Your Backup That You Created in Step 1
   Click Here for instructions for Restoring your Database. Note that if the second computer (B) does not have a database open yet, only the 3rd restore option is available (unzip and copy to a selected folder).

After the Restore has been completed, the computer at the facility now has exactly the same Database as you have on your home computer.

Unzip a File

The Unzip File utility can be used to unzip **any** zip file. To use **SportsBM**'s built in unzip utility, click **File** from the **SportsBM** Main Menu Bar and then **Unzip File**. Select the directory where the zip file is located and **SportsBM** will unzip that file to **C:\ziptemp**. Please note that all files in C:\ziptemp will be deleted before unzipping your selected zip file. After unzipping, you can examine the extracted files(s) and possibly import one of them into your **SportsBM** Database.

NOTE: When importing Account/Athlete files or Entry Fee files that have been sent to you as a Zip file, do not unzip the files. SportsBM will automatically unzip them for you.

Repair or Compact a Database

There may be situations in which your **SportsBM** Database gets damaged because of a hardware problem or power outage. In those cases, you could Restore your latest backup. The problem here is that you will lose any changes or additions you have made since the last time you backed up your Database. You still may have to resort to this, but first try HY-TEK's Repair Database utility.

Click on **File** from the Main Menu Bar, and then **Repair/Compact Database**. **SportsBM** will ask for confirmation and then check to make sure you have enough temporary disk space on your Hard Drive to perform the repair operation. Then **SportsBM** will go through the actions for repairing your Database, as much as possible. This process will also optimize and compact your database to remove deleted records.

After **SportsBM** has completed the repair, go back and check the integrity of the Database: check your Accounts and run a few reports. If there are still problems, use the Restore feature to replace your current faulty Database with one of your backups.

HY-TEK recommends that you backup your SportsBM Database **BEFORE** you use this feature. Please click Here for information on **How to Backup Your Database**.

Import

SportsBM offers several import choices to help minimize your data entry tasks.

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The **Accounts/Athletes** feature allows you to move new or updated **administrative information** from one **SportsBM** Database to another or to move parents and athletes' administrative data between HY-TEK's **SportsBM** and HY-TEK's **TEAM MANAGER**.

The import of Entry Fees from HY-TEK's **MEET MANAGER** or **TEAM MANAGER** is a great time saver; this feature is only available for Swimming and Track & Field.

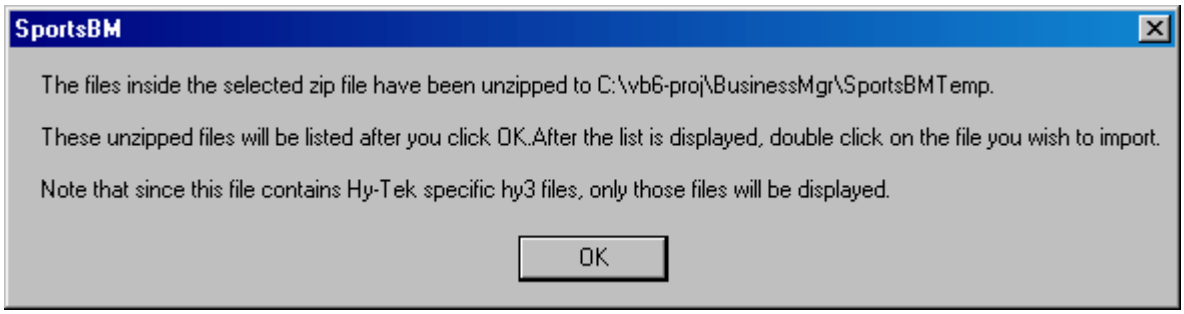
The **Team Registration Online** feature allows you to collect your parent and athlete member information and athlete registration information for USA Swimming. Currently this feature is only available for Swimming.

Import Accounts/Athletes

The normal procedure for teams that use **SportsBM** and HY-TEK's **TEAM MANAGER** is to enter family and athlete data into **SportsBM** first, and then export the data to **TEAM MANAGER**. However, if your team started with **TEAM MANAGER** first, and then added **SportsBM** later, you can save time at start-up by importing Accounts/Athletes from **TEAM MANAGER**. When exporting from **TM**, select **File / Export / Athletes / Teams** and be sure to check the box to "Include Contact & Group Information".

From **Sports BM**'s Main Menu Bar, click on **File / Import / Accounts/Athletes**. **SportsBM** will first ask you to select the Drive, Directory, and File Name of the file you wish to Import. If the Accounts/Athletes file is on a diskette, put the diskette into your Drive A and select **A** from the Windows Open dialog box. **SportsBM** will select all the files with the following file extensions - **HY3** from a **TEAM MANAGER** Database or Sports Business Manager Database**,** and **ZIP** files containing the HY3 files. Pick the one you wish to import and click on **OK.**

If you selected a ZIP file, **SportsBM** will unzip that file into a temporary directory named **SportsBMTemp** and then ask you to choose the Hy3 file that was extracted.



Check the Data

After you have selected the file you wish to Import, **SportsBM** will read the file and make various **integrity checks** to insure the file has good data and is in proper form. At the conclusion of the data integrity checks, **SportsBM** will display information about the file that was selected including who created the file and when it was created. You can proceed or cancel the import. Next the file is scanned and will display all teams in the file. You select the team you prefer. Most of the time there will be only one team.

Import Options

You have three options when importing.

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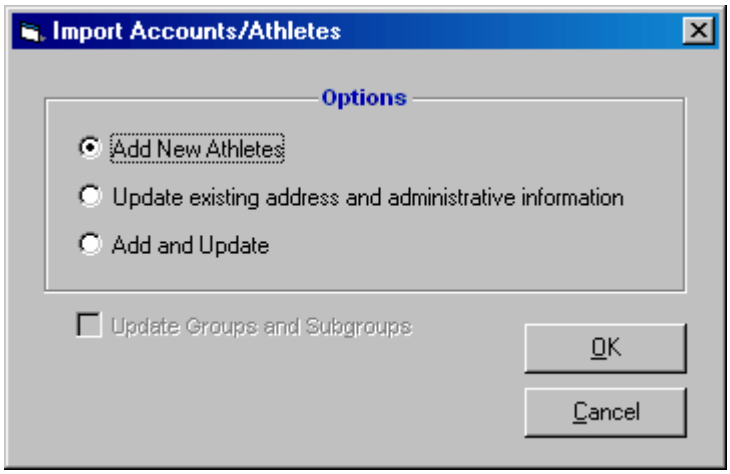

If you select the first choice to **Add New Athletes**, any athletes already found in the database will be skipped and their administrative information will not be updated.

NOTE: If you select the first choice, the "Update Groups and Subgroups" check box is not available. If you select the second choice, **Update existing address and administrative information**, new athletes and their parent account information will **NOT** be added. Only existing athletes and their parent account information will be updated. This second choice is a good way to update address information only. If you select the third choice, **Add and Update**, new athletes and their information will be added as well as address and administrative information updated.

How SportsBM Matches Accounts/Athletes

When you import Accounts/Athletes, **SportsBM** goes through a specific process to find a match for each Athlete being imported into your Database. **SportsBM** first looks for an exact match on the athlete ID. If the ID matches, then it checks the last name and gender to verify. If there is no match on the ID, then **SportsBM** looks for a match of Last Name, First name, Initial, and Gender. If all of these match, then **SportsBM** imports the data for that athlete. If there is no match, and you have indicated that you want to add new athletes, then a screen such as the following one appears and allows you to verify the account and either add the account or select from an existing account for which to attach the athlete.

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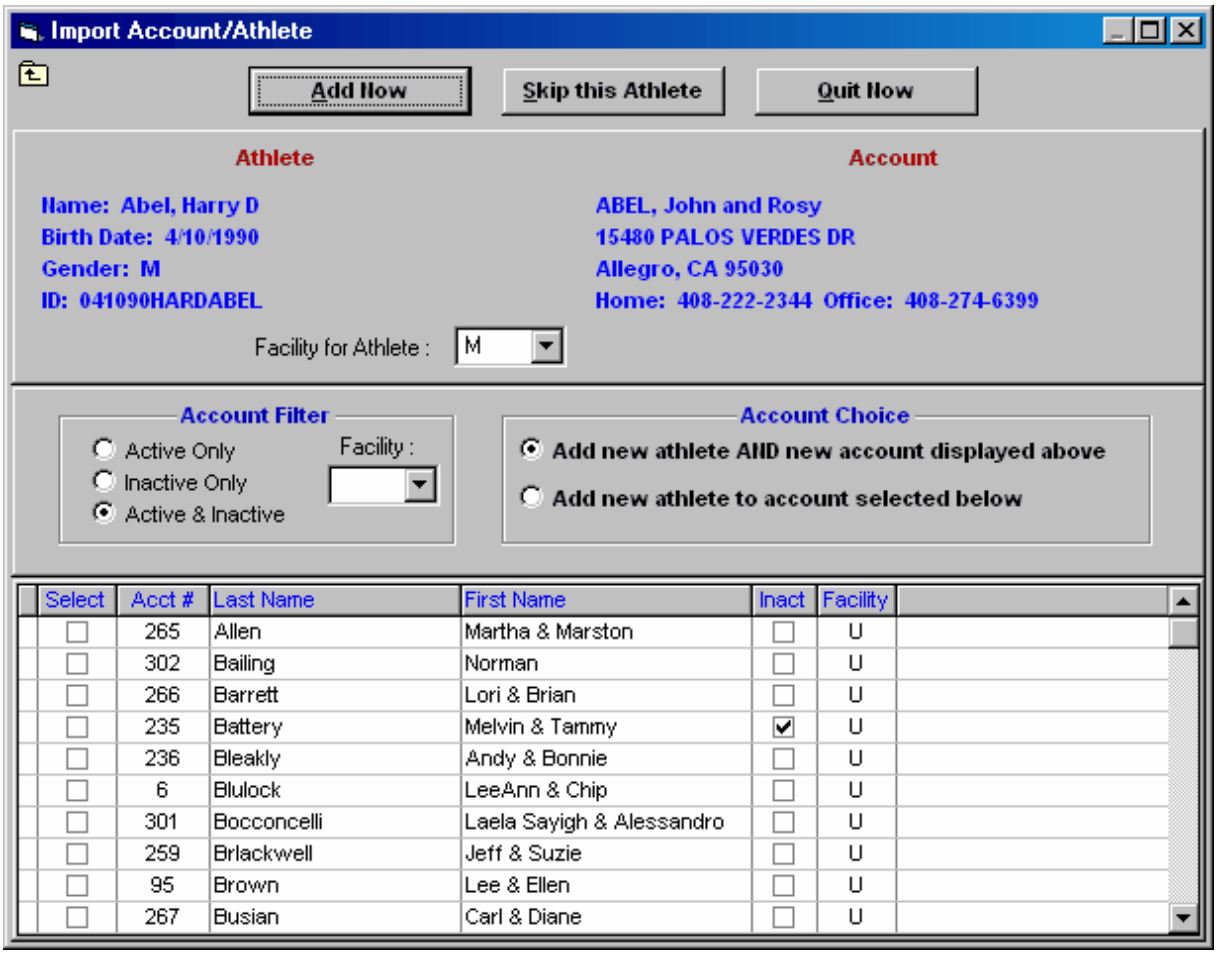

To add the athlete and new account as is, click the Add Now button. To skip adding this athlete, click the Skip this Athlete button. To attach the athlete to an existing account, select one of the accounts listed by checking the left side check box, change the Account Choice to "Add new athlete to account selected below", and then click Add Now. It is important that you select an existing account in the case of brothers and sisters when one of the brothers or sisters is already in the database.

Upon completing the import, you will have the option to create a report detailing who was and was not imported. A typical message is displayed below.

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Import Meet Entry Fees

Entry fees by athlete can be imported from HY-TEK's **MEET MANAGER** or HY-TEK's **TEAM MANAGER.** This is currently only available for two sports: Swimming & Track & Field. In order to do this import, it is very important to make sure that the meet host has provided you with the correct file or else you will not be able to import the results into your **SportsBM** Database.

Examples of Files you can Import

CFILE01.CL2	Meet Results from WIN-MM 1.4 in Swimming
NAC-MeetEntries-001.hy3	Meet Entries from TM 4 for Swimming
NAC-MeetResults-001.hy3	Meet Results from MM 2.0 in Swimming
PLY-IN-Entries001.zip	Meet Entries from TM 4 for Swimming
TCL01-01.tcl	Track & Field MM or TM

From the **SportsBM** Main Menu Bar, click on **File / Import / Meet Entry Fees**. **SportsBM** will first ask you to select the Drive, Directory, and File Name of the file you wish to Import. If the file is on a diskette, put the diskette into your Drive A, and select **A** from the Windows Open dialog box. **SportsBM** will select all the files with the following file extensions - **HY3**, **CL2**, and **ZIP** if Swimming and **TCL** and **ZIP** if Track & Field. Pick the one you wish to import, and click on **OK**.

If you selected a ZIP file, **SportsBM** will unzip that file into a temporary directory named **SportsBMTemp** and then ask you to choose from the list of files that were extracted (usually there will only be one file to choose).

NOTE: You can only import 1 team's entry fees at a time.

A screen will appear with the charges as set up in TEAM MANAGER or MEET MANAGER. You can modify them or add to them from this screen.

Check the Data

After you have selected the file you wish to Import, **SportsBM** will read the file and make various **integrity checks**. These checks are important because you do not want to import "**bad data**". **SportsBM** will also display information about the file that was selected including who created the file and when. Because the import file may have more than one team's entries, you now be prompted to select a team for importing entry fees (select only 1 team).

If the import file is from MEET MANAGER, you have several choices as shown in the screen below:

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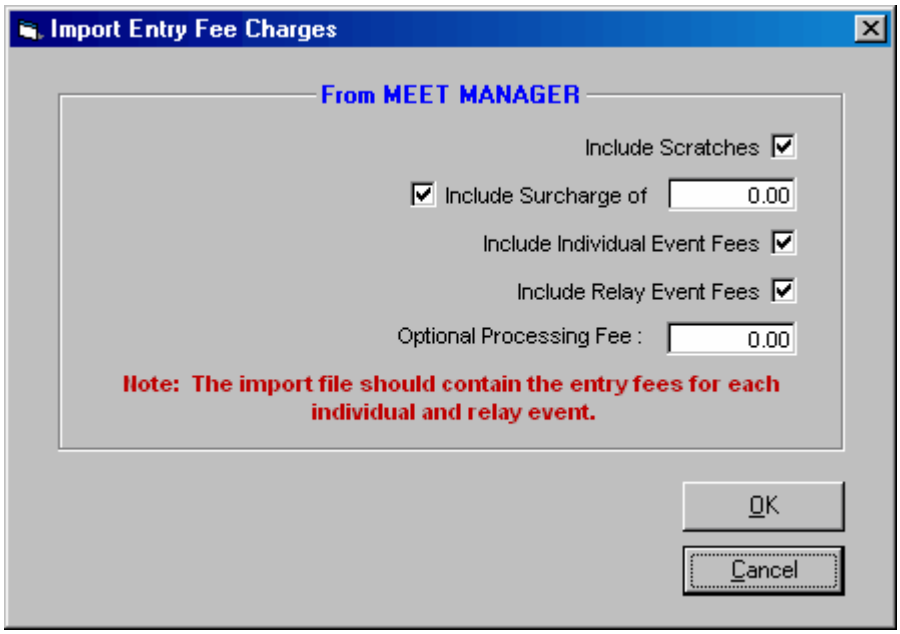
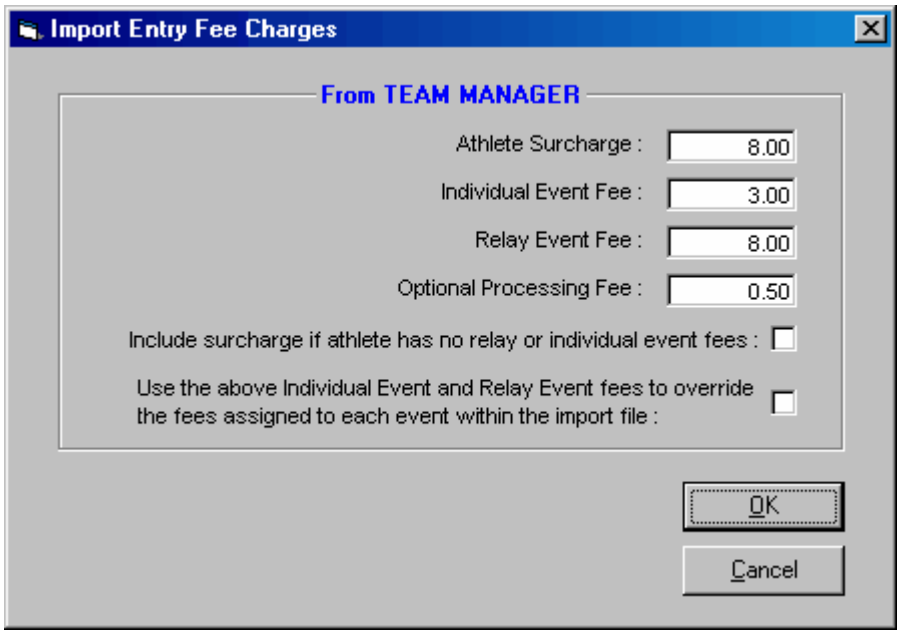


If the import file is from TEAM MANAGER, you will see a screen that looks like the following:



Click **OK** to start the Importing process. A screen like the one below will appear that shows the fees being imported. If you want to change the Individual Event fee and/or the Relay Event fee, check the 2nd check box above and alter the fee. Otherwise the fees within the import file will be used and it is possible that fees vary from one event to another. If an Account Number has a **?**, it means the athlete name was not found in the database, maybe because it is misspelled. If you know the account number, click on the ? mark and enter the account number. **SportsBM** will not import any fees for athletes that do not have a **valid** account number.

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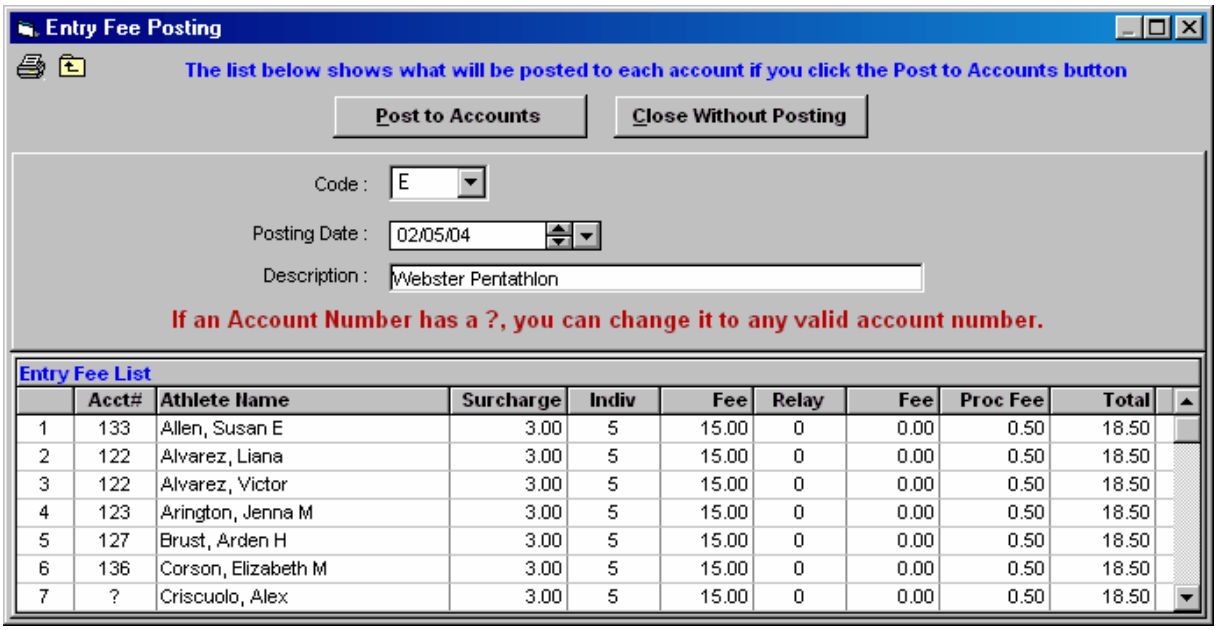


	Acct#	Athlete Name	Surcharge	Indiv	Fee	Relay	Fee	Proc Fee	Total
1	133	Allen, Susan E	3.00	5	15.00	0	0.00	0.50	18.50
2	122	Alvarez, Liana	3.00	5	15.00	0	0.00	0.50	18.50
3	122	Alvarez, Victor	3.00	5	15.00	0	0.00	0.50	18.50
4	123	Arington, Jenna M	3.00	5	15.00	0	0.00	0.50	18.50
5	127	Brust, Arden H	3.00	5	15.00	0	0.00	0.50	18.50
6	136	Corson, Elizabeth M	3.00	5	15.00	0	0.00	0.50	18.50
7	?	Criscuolo, Alex	3.00	5	15.00	0	0.00	0.50	18.50

If you wish to post the fees as shown, click on **Post to Accounts**; if you wish to exit without posting the fees as shown, click on **Close Without Posting**.

Note that charges will only be posted for athletes that have an account number listed in the Acct # column.

Click the Printer Icon at the top left to create a report of what will be posted.

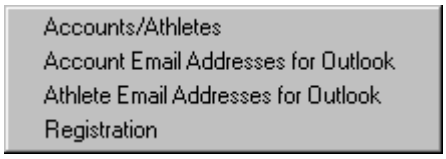
Team Registration Online

This option is only available when **SportsBM** is setup with **Swimming** as the Sport within System Preferences.

Team Registration Online

Export

Click on **File** / **Export** and pick from the following list.



Export Accounts/Athletes

Choose your Export Drive and Directory, and then make Export Filter selections, such as Gender, Active/Inactive status, and Groups/Subgroups. From the SportsBM Main Menu Bar, click on **File**, then **Export**, then **Accounts/Athletes**.

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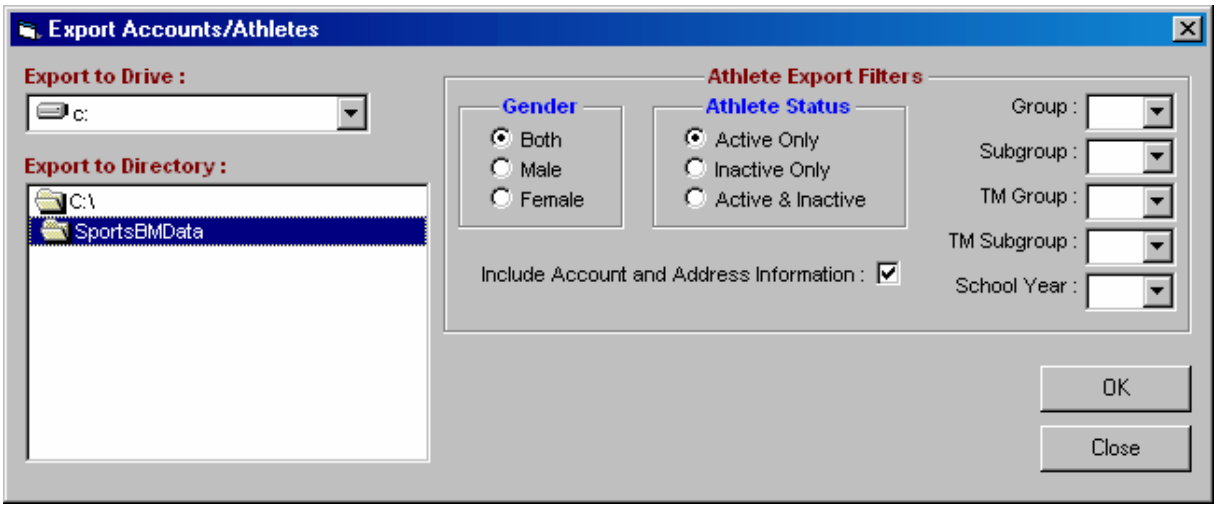
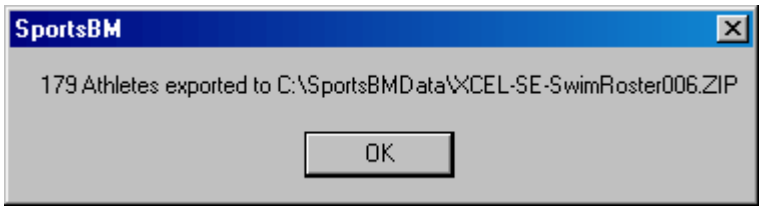


If you plan on mailing or taking this information to another computer, specify Drive A as your Export Drive. If you want to e-mail the information, specify any directory on your hard drive as the Export Drive/Directory.

After the export is completed a screen will appear telling you what has been exported and where the export is located.



As seen above, the export data is located on the C drive in the **SportsBM**Data folder, and the name of the file is FLSC-VA-SwimRoster002.ZIP.

Email Data

If you would like to **email this data** to another person, just use your standard email software and attach the ZIP file. When the meet hosts receive that file, they will import your data.

Account Email Addresses for Outlook

If you want to create an email list of Account Emails for use by Outlook Express, click **Export / Account Email Addresses for Outlook**.

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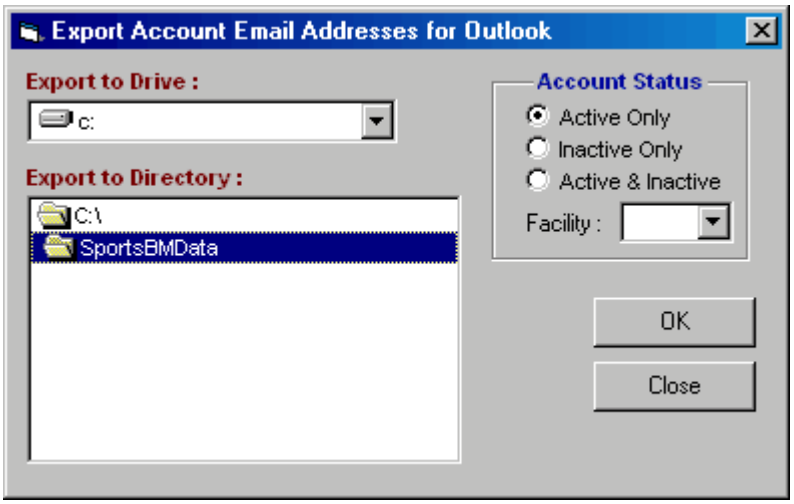
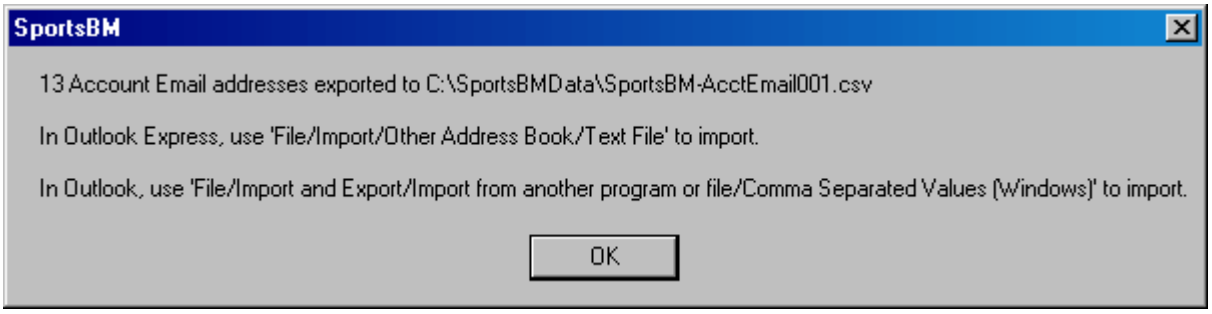
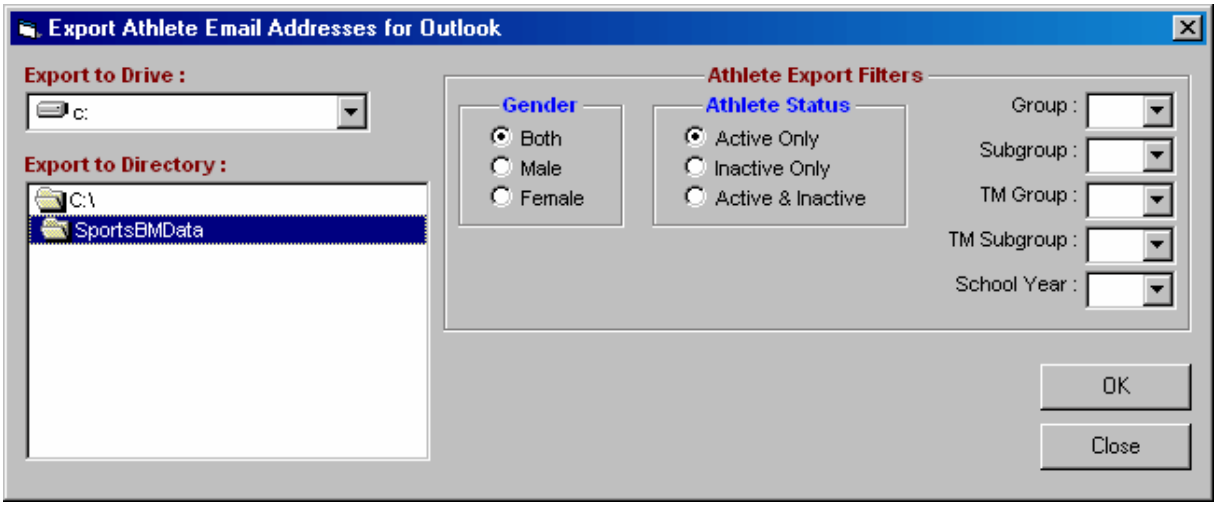


Select a facility if you wish, an activity status, and the Directory for the comma separated file to be exported to. After the export a message such as the following indicates how to import the comma separated file into Outlook Express or Outlook.



AthleteEmail Addresses for Outlook

If you want to create an email list of Athlete Emails for use by Outlook Express, click **Export / Athlete Email Addresses for Outlook**.



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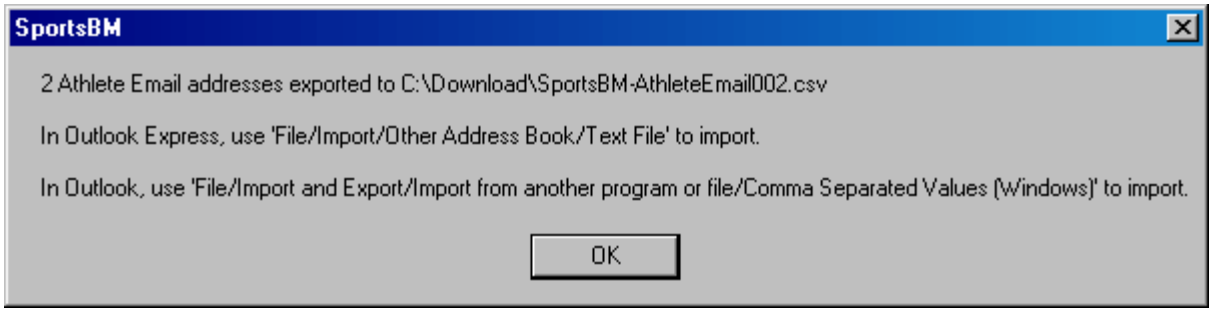
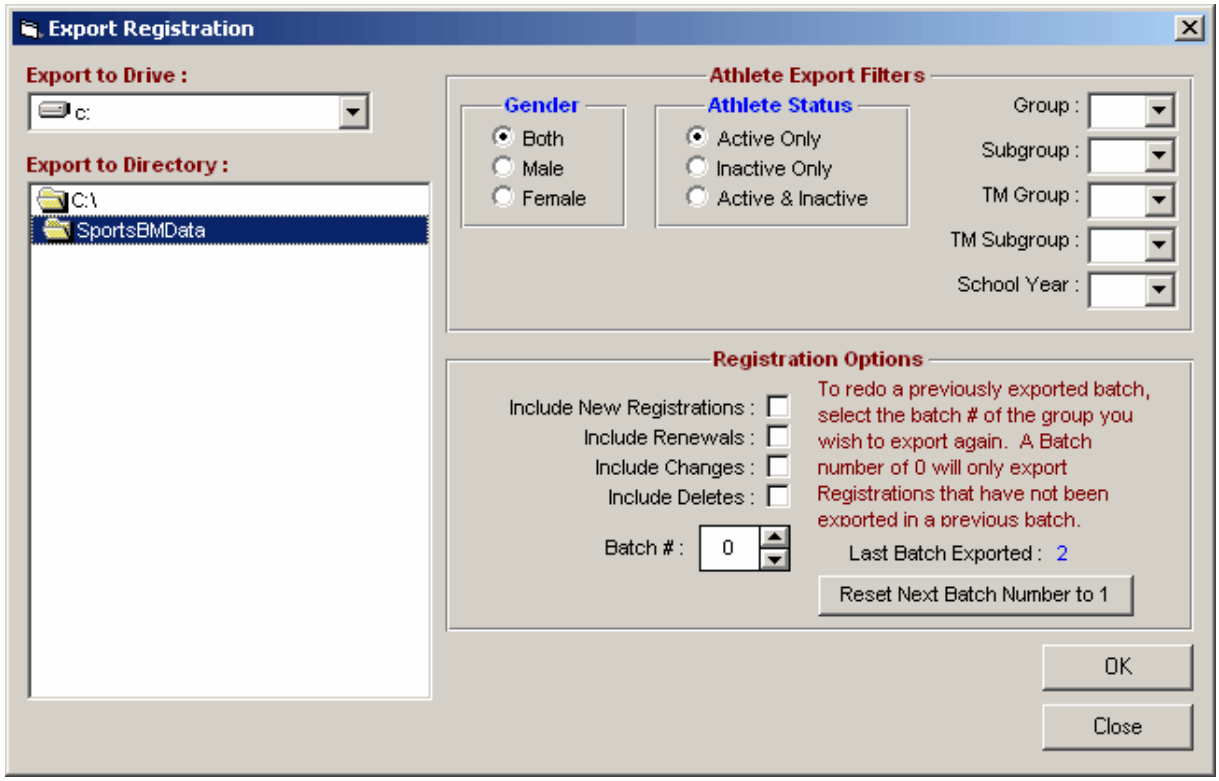
Select from groups, athlete status, gender, and the Directory for the comma separated file to be exported to. After the export a message such as the following indicates how to import the comma separated file into Outlook Express or Outlook.



Export Registration

This feature is available **ONLY for Swimming and only if the Team Registration Type is USS**. From the SportsBM Main Menu Bar, click on **File**, then **Export**, then **Registration**. If you plan on mailing or taking this information to another computer, specify Drive A as your Export Drive. If you want to Email the information, specify any directory on your hard drive as the Export Drive/Directory.



A swim organization may want to set up a process to periodically register athletes. This registration may take place at the team level so that each team would export the registration information for the athletes to a central Registration Database. The Export Registration feature allows a team to mail or e-mail a registration file that contains specific registration information about each athlete. The particular Athlete registration setup and export in **SportsBM** is specifically designed to accommodate **USA**

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Swimming's National Registration process.

From the **SportsBM** Main Menu Bar, click on **File / Export** / **Registration**. Athletes who do not have primary address information for address, city, state, zip, and home phone number will not be exported. Only **Active** athletes are exported. If you plan on mailing or taking this information to another computer, specify Drive A as your Export Drive. If you want to e-mail the information, specify any directory on your hard drive as the Export Drive/Directory.

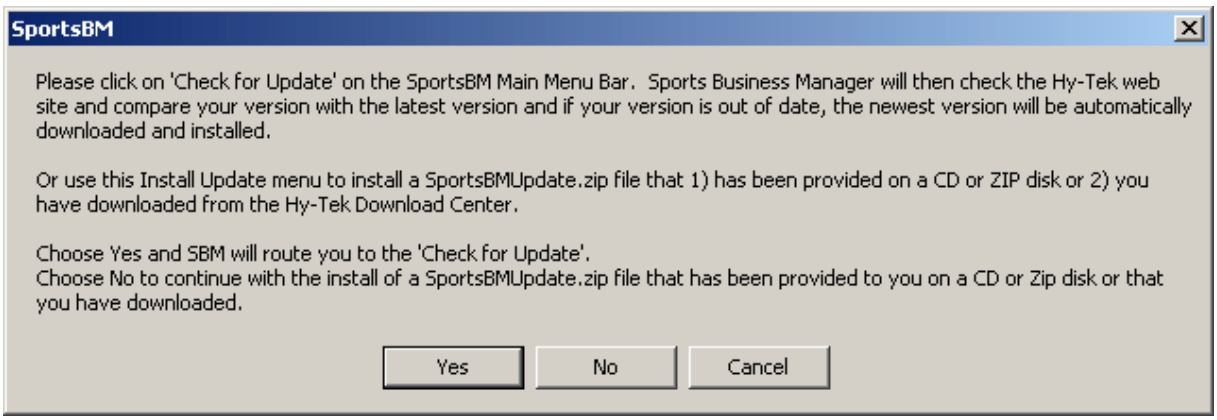
Each export gets a unique batch number assigned to it. If the batch number gets large over the years, you can reset it to 1, but this will mean all history of previous batches will be lost.

Email Registration Information

If you would like to **email the registration information** to another person, just use your standard Email software and attach the ZIP file created by this export. When the meet host receives that file, they will import your registration information.

Install Update

Periodically, HY-TEK provides what are called **Service Pack Updates** that contain corrections to reported problems. These Service Pack Updates are FREE if they are for the same "major release" of SportsBM and are always provided on HY-TEK's web site at **www.hy-tekltd.com**. If you select **File / Install Update**, you will receive this message.



As stated in the above message, the preferred method for updating is to use the Check for Updates selection from the main menu bar.

Alternative Method for Installing a Service Pack Update

Besides the preferred Check for Updates method, there are two other ways to Download and Install a Service Pack Update.

1. The easiest way is to use the **Web Browser** which is reached by clicking **File / Web Browser**. For more on the Web Browser, click here for details.
2. Or, go to the HY-TEK web site using your internet browser and download and then install the update yourself. Connect to the HY-TEK web site at **www.hy-tekltd.com** using your Internet browser. Then click on the **Download Center**, and select the **Sports BUSINESS MANAGER Update**. If your browser gives you the choice to "Open" or "Save to Disk", you must choose "Save to Disk". After the "Save to Disk" is selected, your Browser asks you where to save the Service Pack Download File (the name of the file is **SportsBMUpdate.zip**). Specify any directory or folder on the Hard Drive such as C:\Hy-Sport. **DO NOT** save the download to a floppy diskette drive because the file will not fit on one diskette. When the download has been completed, open MM and click on **File** then **Install Update** as described above and select the same directory/folder you

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chose for the download (such as C:\Hy-sport) and double click on the downloaded file and SportsBM will install the Service Pack Update and start the new version.

After the update has been installed, the version number shown on the Main screen at the bottom left should be the new version. If it is not, the update did not succeed and you will need to try installing the update again. This time wait several seconds before clicking any OK buttons that the install update provides.

Installing The Update On Other Computers

If you do not have access to the Internet, then you have two ways of updating your computer with the latest MM software from Hy-Tek.

1. Obtain a copy of the SportsBMUpdate.zip file you have downloaded and copy that file to a ZIP disk or a writeable CD and take that ZIP disk or CD to your computer that does not have Internet access. Now start **SportsBM** and click on **File** / **Install Update**, answer No to the first question and pick your ZIP disk or CD. Note: On a SportsBM computer that has Internet access and where you used the Check for Updates option, you will find the last SportsBMUpdate.zip file that was downloaded in a directory named Download in the installation directory - typically c:\hy-sport\SportsBM\Download.

2. Order a replacement CD from the HY-TEK Sales Office. When you receive the new SportsBM Installation CD, follow the normal instructions for installing SportsBM. Click Here for information about how to do that.

Web Browser

Click on **File / Web Browser** and SportsBM will automatically route you to the HY-TEK web site. The Web Browser offers the standard Back, Forward, Stop, Reload, and Print web page functions as well as the following Menu selections.

At this point you can browse the Internet and go to any site. If you want to store a list of Favorite web sites, click **Favorites**.

Favorites

Once the Web Browser is connected to the Internet and you have a web page that you commonly access, you can click the Favorites icon, and you have the option to add the currently opened site to your Favorites list. Just click **Add**. Additionally, once you are in the Favorite Web Sites screen, you can **Edit** or **Delete** a Favorite web site from the list. This is a great feature for keeping track of swimming web sites that you frequently access such as your own club's web site.

To select a site from your list, simply click on one of the names and then click **Close**.

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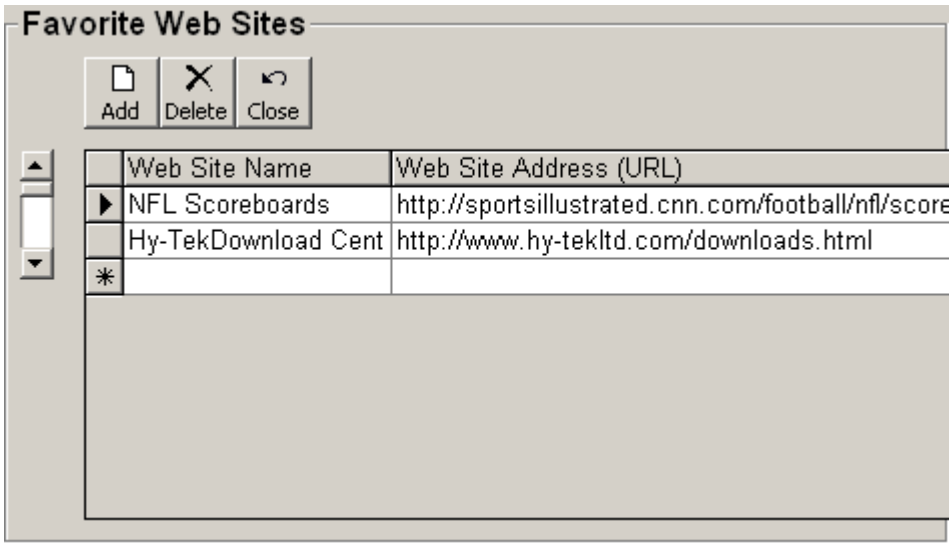

SportsBM Update

The preferred method to install SportsBM updates is to click "Check for Updates" from the Main Menu Bar of SportsBM. If you have a firewall that prevents the "Check for Updates" from working, then you can update SportsBM from the HY-TEK web site by clicking on the **Download Center** from the HY-TEK Home page, and select the **Sports BUSINESS MANAGER Update**. If the browser gives you the choice to "Open" or "Save to Disk", you must choose "Save to Disk". After the "Save to Disk" is selected, your Browser asks you where to save the Service Pack Download File (the name of the file is **SportsBMUpdate.zip**). Specify any directory or folder on the Hard Drive such as C:\Hy-Sport. **DO NOT** save the download to a floppy diskette drive because the file will not fit on one diskette.

When the download has been completed, close the Web Browser and upon exit, the SportsBM Web Browser will ask if you want to update your SportsBM software. Click on the **Yes** button, and SportsBM will install the new update for you and then automatically start up your new SportsBM product.

License Management

This feature is designed specifically for Customers who have arranged with HY-TEK Sales to receive an updated license via Web Delivery. This allows you to update your license immediately rather than wait for a CD to be shipped. The license to be updated must be the Active License.

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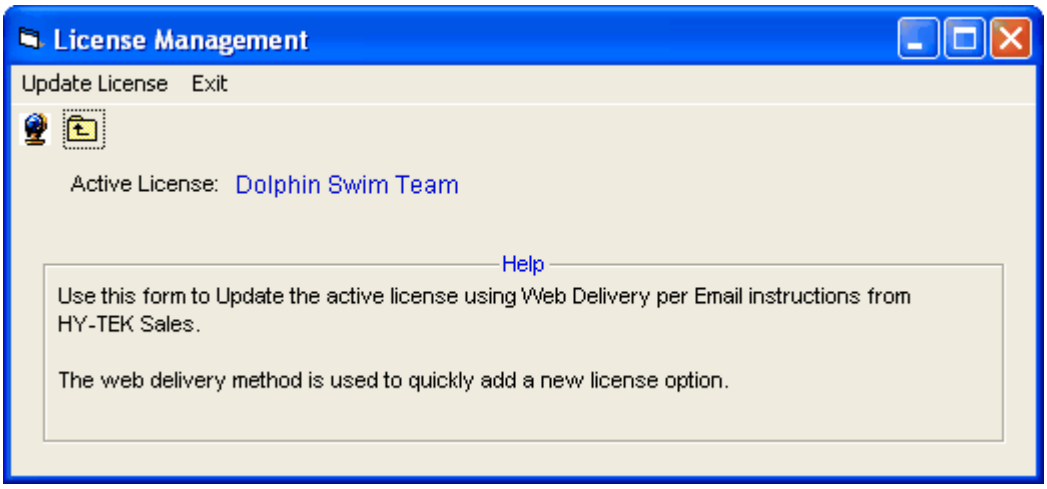
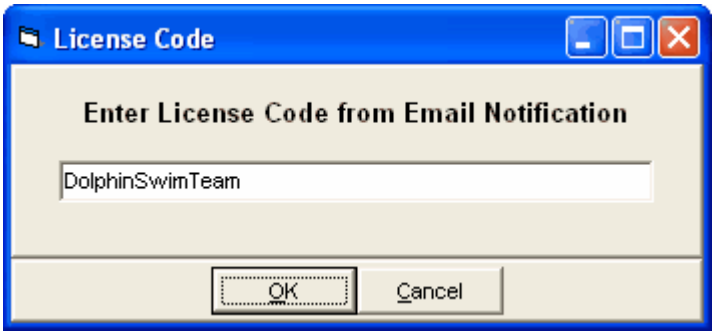


You would receive an Email from HY-TEK Sales with a **License Code** which you enter into the following window which appears after clicking **Update License**. In this example, the License Code is DolphinSwimTeam which matches the Active License in the example above.



After you click OK, SportswBM will search the HY-TEK web site for your license and will download and replace the Active License with the downloaded license. After the license is replaced, you can go to Help / About to verify the new license. You would do this to add an option.

Open in Multi-User Mode

The **Open in Multi-User** or **Single User Mode** toggle selection applies to the Network feature available ONLY in the **SportsBM** with the **Pro** option. Please click Here for information on the **SportsBM Pro** optional feature.

Network Administration

This File menu selection is available ONLY in the **SportsBM** with the **Pro** option. Make this selection, and **SportsBM** will display a list of the nine User Names with the name of the computer associated with each logged-on User Name. Please click Here for information on the **SportsBM Pro** optional feature.

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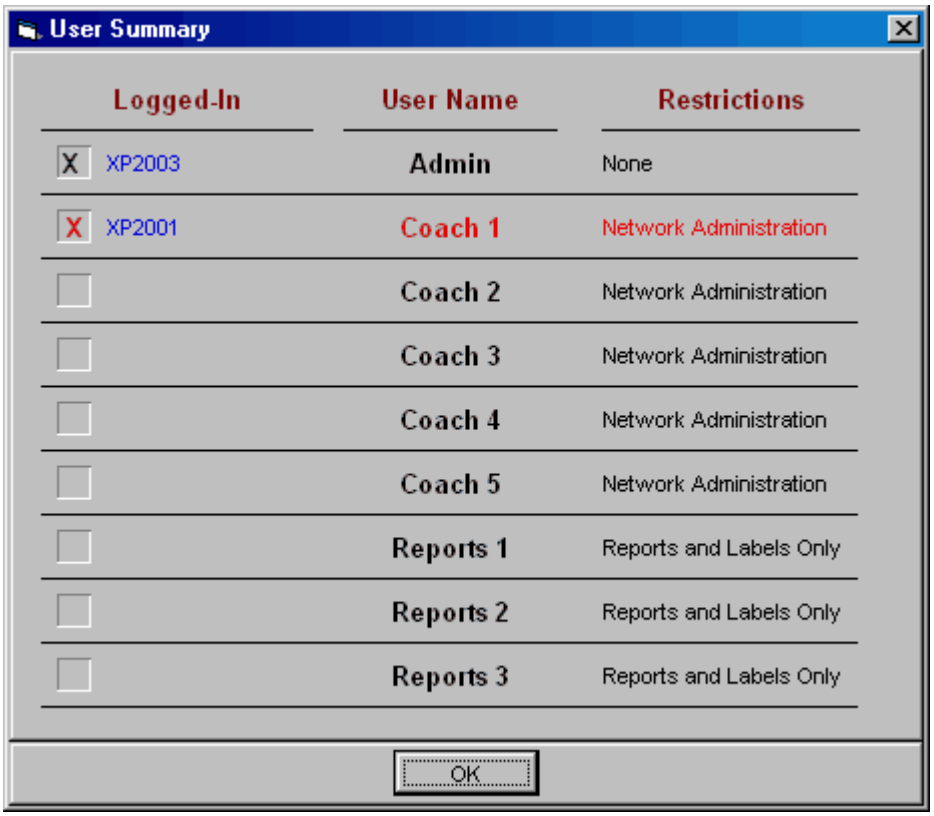

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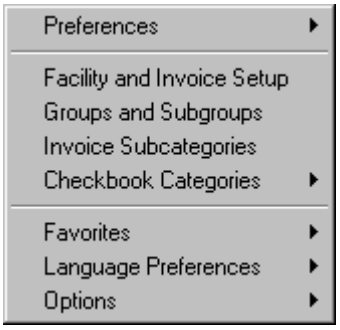
Set-up Menu

Preferences
Facility and Invoice Set-up
Groups and Subgroups
Invoice Subcategories
Checkbook Categories
Favorites
Language Preferences
Options

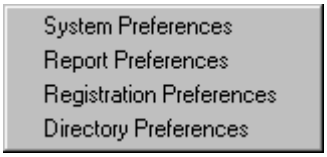
Sports BUSINESS MANAGER has an extensive offering of set-up options found under the **Set-up** tab at the Main Menu.



Preferences

System Preferences
Report Preferences
Registration Preferences
Directory Preferences

Click on **Set-up** then **Preferences** and SportsBM will offer the following choices.



System Preferences

Depending on the sport chosen, there are several of the System Preference items that are required. Base Country is required for all sports. These "System Preferences" can be changed at any time.

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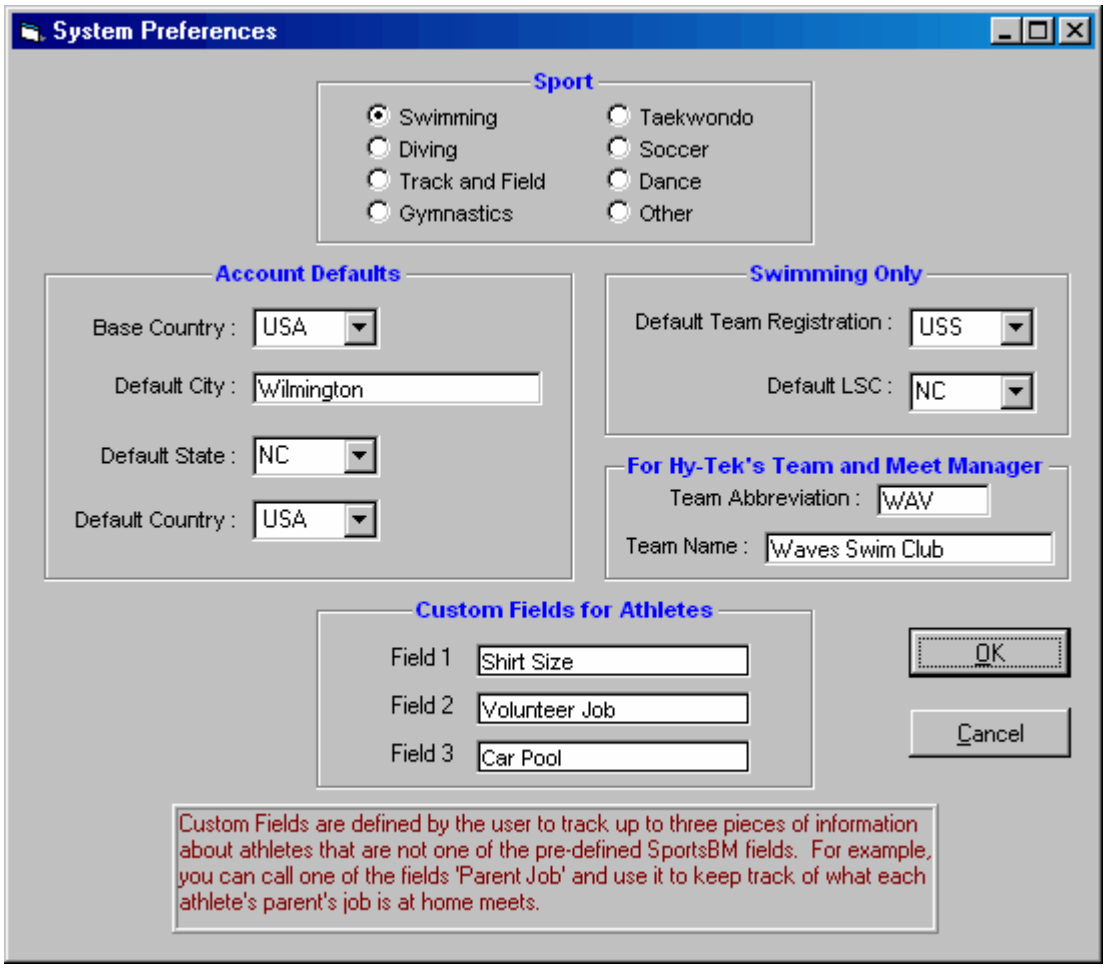
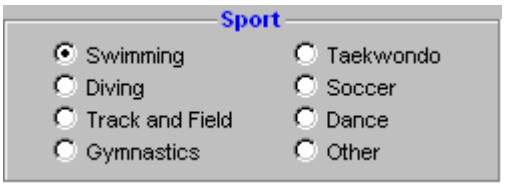


Sport Designation

Click from the list below to select the appropriate sport:



Account Defaults

As illustrated in the sample menu below, you can set up defaults to save yourself time when entering information. **SportsBM** will use these values whenever that information is required in the Accounts Menu. Choose your base country from the combo box, then optionally type in the name of the most common city. The selections for default state will vary depending upon the Base Country chosen.

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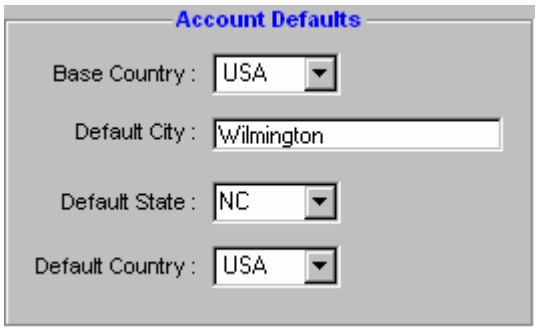
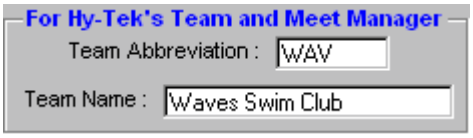


Swimming Defaults

Select a Default Team Registration and a Default LSC. **SportsBM** will use these values whenever that information is required in the Athlete or Set-up.



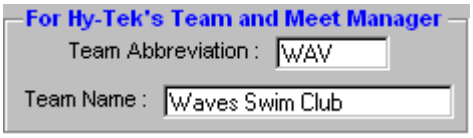
SportsBM will use the Team Registration choice to format the Athlete's registration ID.

Swimming Team Registration

AUST for Australian Swimming
NZSF for New Zealand Swim Federation
OTH for Other or No Registration
SSA for Swimming South Africa
UK for the United Kingdom
USS for USA Swimming

HY-TEK's TEAM MANAGER and MEET MANAGER Defaults

If you are using **SportsBM** to exchange data with any **of HY-TEK's TEAM MANAGER** or **MEET MANAGER** software programs in Swimming or Track & Field, the Default Team Abbreviation and Default Team Name are required. This abbreviation is 4 characters for all sports except swimming where it is 5 characters. In Swimming, the Abbreviation and Team Name are also used for USA Swimming registration.



Athlete Custom Fields

SportsBM can store information for up to three Custom Fields for each Athlete. The custom fields may be named, and then information can be entered for each field for any athlete. For example, you might want to keep track of athlete uniform sizes, parent volunteer information about each athlete - who has volunteered to time, to run the snack stand, to setup prior to a meet, etc., or car pool data.

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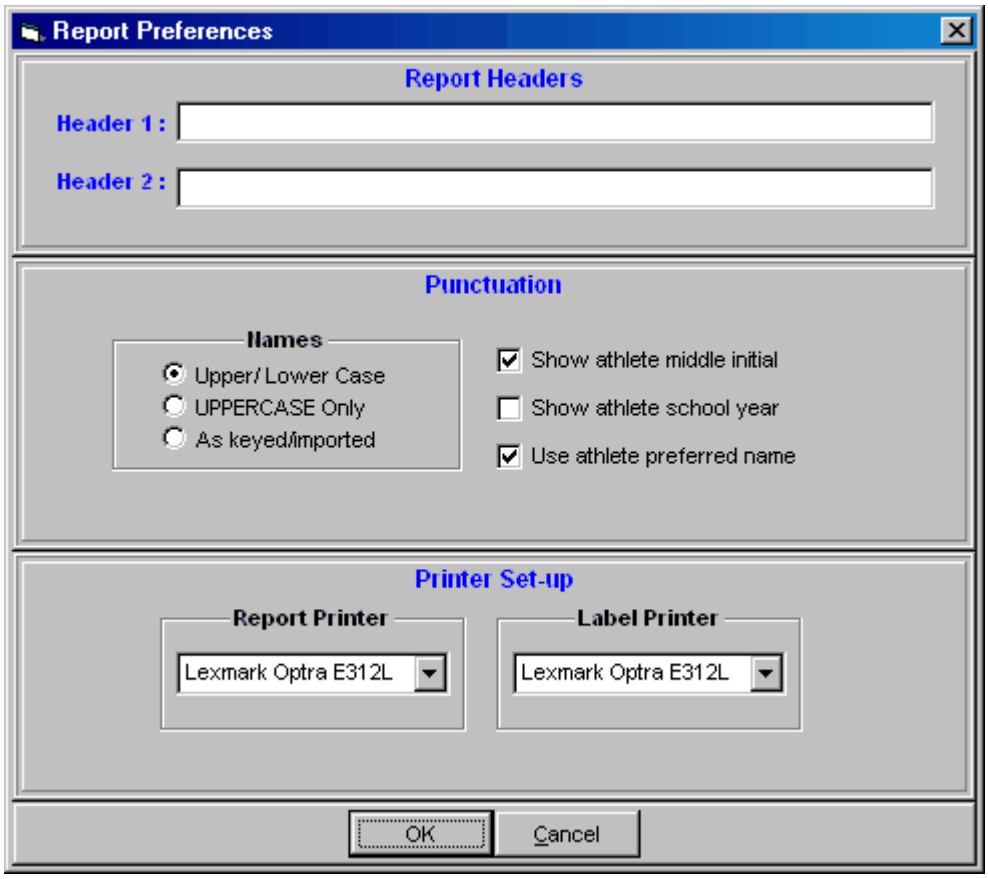
Report Preferences

Click on **Set-up** / **Preferences** / **Report Preferences**.



Report Headers

You may enter a one line or two line header that will be centered and printed at the top of every report.

Punctuation

- You have the option of showing an athlete's middle initial.
- You have the option of showing an athlete's school year.
- Athletes' names can be displayed in the following formats:
- Upper/Lower case
- UPPERCASE Only
- As keyed/imported

Printer Set-up

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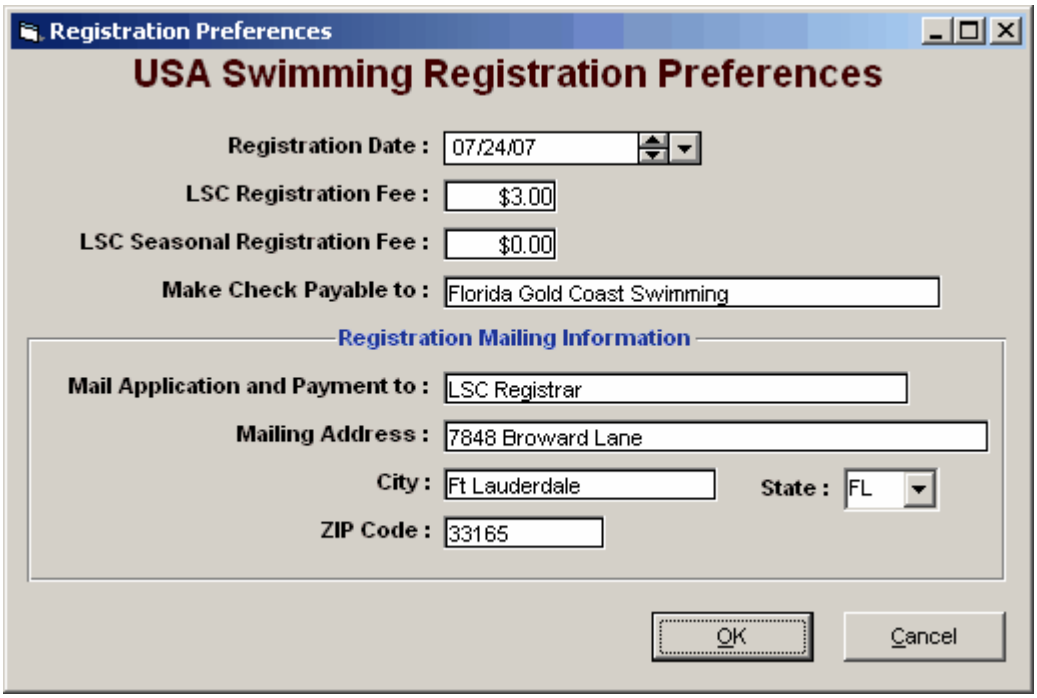
Select the Printer you wish to use for reports and labels from the list of Windows installed Printers.

Registration Preferences

Information entered on the Registration Preferences screen will appear on the Individual Athlete Registration Application. To create the application, go to the **Main Menu**, click on **Athletes** / **Registration**, and then check the box **Print Form**.



Default Registration Date

When you click on **Registration** from the Athlete Browser, this is the default date that **SportsBM** will use for an athlete's NEW registration. If you are editing a previous registration, then **SportsBM** will display the date that was last used for registration.

Directory Preferences

Click on **Set-up**, then **Preferences**, then **Directory Preferences**. This feature offers the option to specify a default directory that you want **SportsBM** to use for:

- Imports
- Exports
- Backup/Restore

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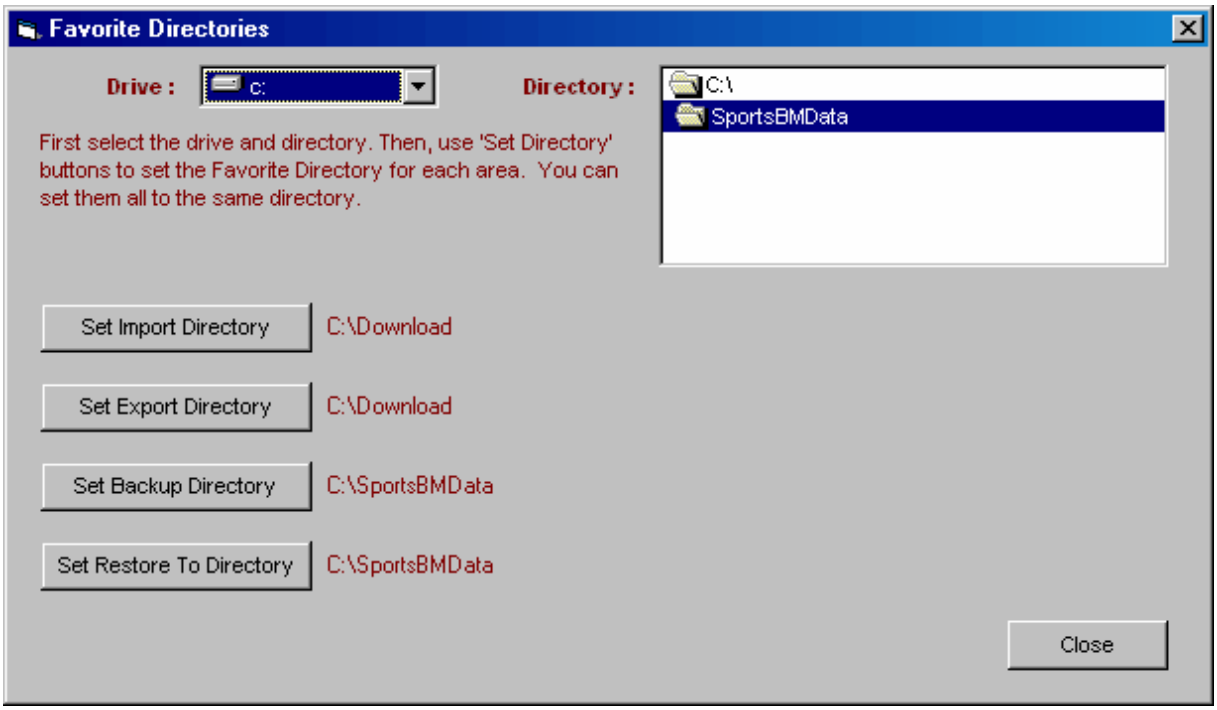

Choose a directory from the displayed list to associate it with any of the three functions listed above. Then, in the example above, whenever you export a file, **SportsBM** will automatically use the directory C:**SportsBM**Data that was specified.

Facility and Invoice Set-up

Add or Edit Facilities
Edit Invoice Categories
Invoice Parameters
Emailing Setup

SportsBM gives you the ability to manage multiple facility locations in one system, yet keeps them separate for reports and billing. The Invoice Return Address will be the same for all facilities, but the Return Address Name can be unique. The return address name for invoices is pulled from the return address name for each facility. In addition, the "Check Payable To" name for each facility can be different, if desired.

From the Main Menu, click on **Set-up / Facility and Invoice Set-up**, and the Facility and Invoice Setup screen will appear.

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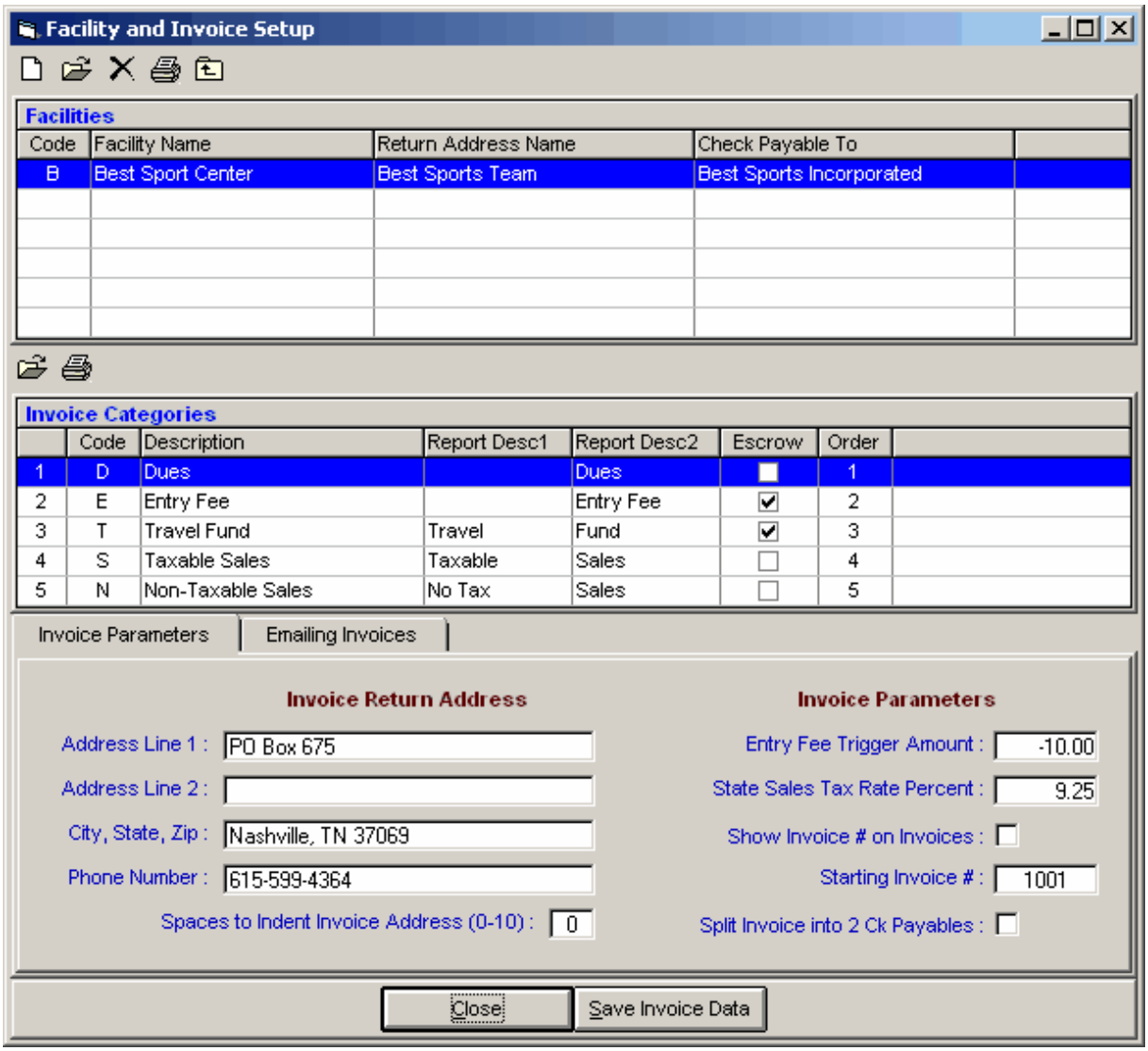

If you make any changes to the above screen, click on the button **Save Invoice Data**. If you make changes and try to exit, you will be prompted to save changes or not.

Add or Edit Facilities

To add or edit Facilities, from the Main Menu, click on **Set-up / Facility and Invoice Set-up**.

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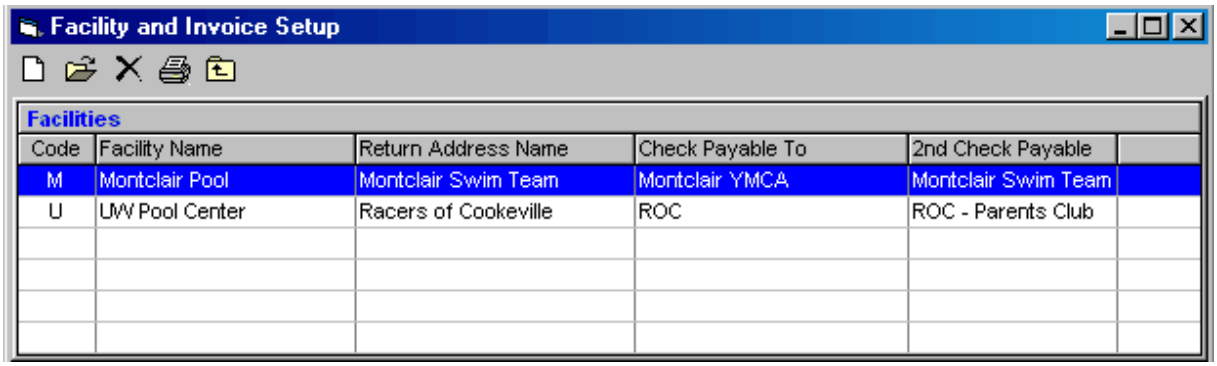
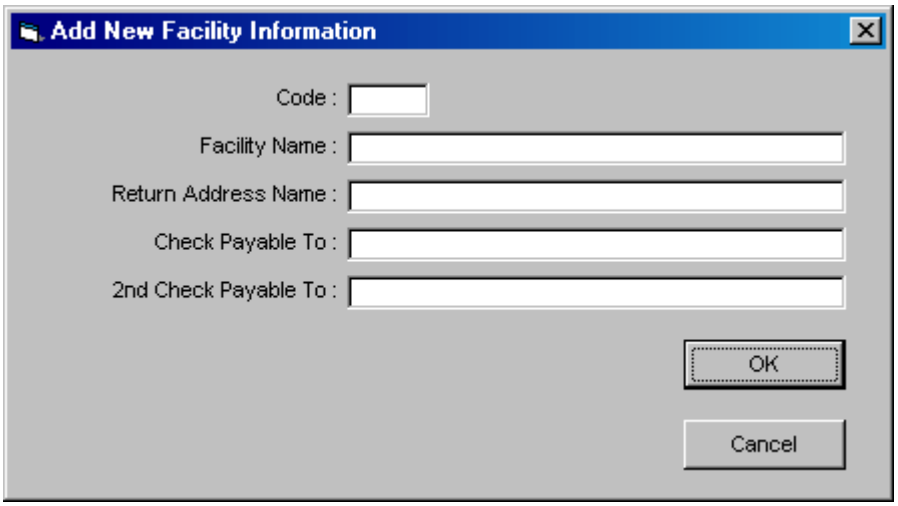


Code	Facility Name	Return Address Name	Check Payable To	2nd Check Payable
M	Montclair Pool	Montclair Swim Team	Montclair YMCA	Montclair Swim Team
U	UW Pool Center	Racers of Cookeville	ROC	ROC - Parents Club

Click on the **Add** or **Edit** Icon and a screen will appear that asks for the following data to enter or edit:



The four fields above must be filled in. The fifth is required if you have indicated that you want two check payables. All fields are mandatory. The Code can be up to 3 characters. The Facility Name can be up to 23 characters while the Return Address and the Check Payable lines both take up to 30 characters.

NOTE: If there is only one facility in the setup, that facility is always selected when accessing any menu.

Edit Invoice Categories

Invoice Subcategories

To edit Invoice Categories, from the Main Menu, click on **Set-up / Facility and Invoice Set-up**.

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Invoice Categories

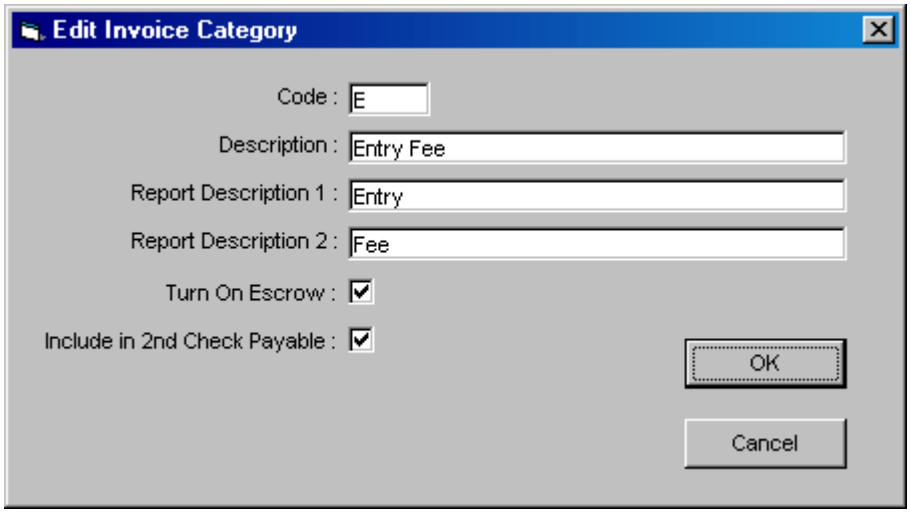
	Code	Description	Report Desc1	Report Desc2	Escrow	Order
1	D	Dues		Dues	☐	1
2	E	Entry Fee		Entry Fee	☑	2
3	T	Travel Fund	Travel	Fund	☑	3
4	S	Taxable Sales	Taxable	Sales	☐	4
5	N	Non-Taxable Sales	No Tax	Sales	☐	5

The above category names and codes are the default settings when SportsBM is initially setup.

Important Notes:

- You cannot change the order, and you cannot add more invoice categories.
- The second category in the 2nd row is the only category that works with the "Add to Escrow" feature on invoices.

To change any one of these, click on the **Edit** Icon or double click a row and a screen will appear for editing:



You will be able to change the code, the description, the headings for reports (Report Description 1 and 2). You can also turn on or off the escrow behavior for any of the 5 categories. If you have two check payables to, then a checked box means add this category to the 2nd check payable to.

Invoice Parameters

To setup your Invoice Parameters, from the Main Menu, click on **Set-up / Facility and Invoice Set-up**.

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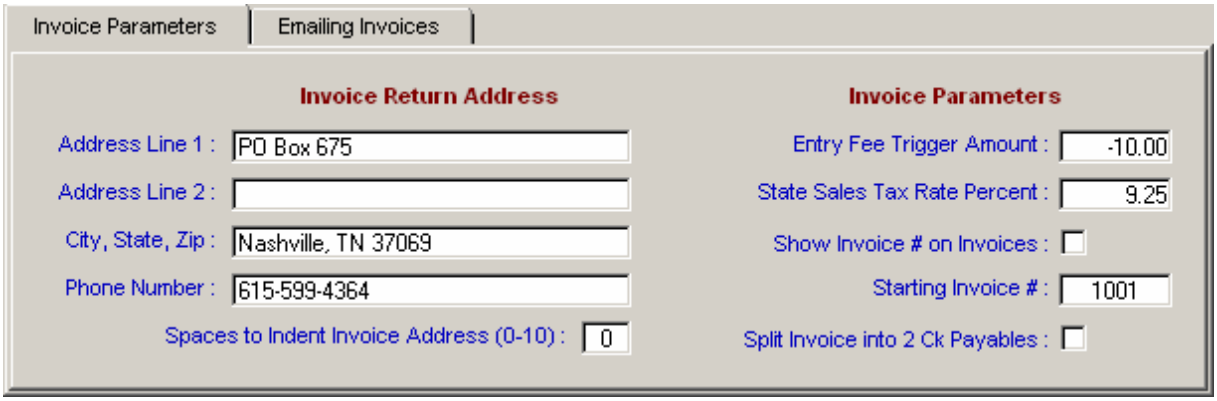

Invoice Return Address

- Fill in your Invoice Return Address which will be the same for all invoices for all facilities. However, the Return Address Name for a given invoice will be the Return Address Name for the facility that the account is assigned to. See Add or Edit Facilities for how to change the Return Address Name.
- When printing invoices, you have the option to move the return address, the return phone, and the return address of the account up to 10 spaces to the right so as to custom fit envelopes with see through address windows.

Invoice Parameters

- **Entry Fee Trigger Amount:** Enter an Entry Fee Trigger Amount to have the escrow account automatically charged. The Entry Fee Trigger Amount only applies to the **2nd Invoice category**, regardless of its description. Enter an amount from -99.99 to -0.01, and this trigger amount will be used to determine when an additional amount will be charged to a particular account. If an account's Entry Fee Escrow Amount is $100.00 as set up in the Accounts Menu, and the Entry Fee balance is a $5.00 credit and the trigger amount is a $10 credit (-10.00), then $95.00 will be added to the invoice and labeled as "Add to Escrow". In this example, if the account has $10 or more Entry Fee credit balance, then nothing extra will be added to the invoice. If the trigger amount is set to zero, then the trigger amount will NOT be used and the "Add to Escrow" feature will not be used.
- **Sales Tax:** Include your state's Sales Tax for taxable items. Click Here for Sales Tax information.
- **Show Invoice # on invoices:** If you want to have unique invoice numbers on each invoice, check the box for Show Invoice # on invoices. Also enter the invoice # you wish to start with.
- **Split Invoice into 2 Ck Payables:** If you need to have two "Check Payable To" names on invoices, check the box under Invoice Parameters that says Split Invoice into 2 Ck Payables. This allows you to have one check payable for dues to say the YMCA and another check payable to for the other four invoice categories payable to the Club. You can divide the categories in any combination between the two check payable to names. An extra column will appear in the invoice categories grid to enable you to mark which categories apply to the "2nd check payable to name." Plus a second column will appear in the Facilities grid to allow you to enter the name for the 2nd Payable To.

Emailing Invoices Setup

How to Email Invoices

SportsBM gives you the ability to Email invoices rather than mailing them. In order to do this, you must setup the Email account within SportsBM. From the Main Menu, click on **Set-up / Facility and Invoice Set-up**, and then click the Emailing Invoices tab at the bottom.

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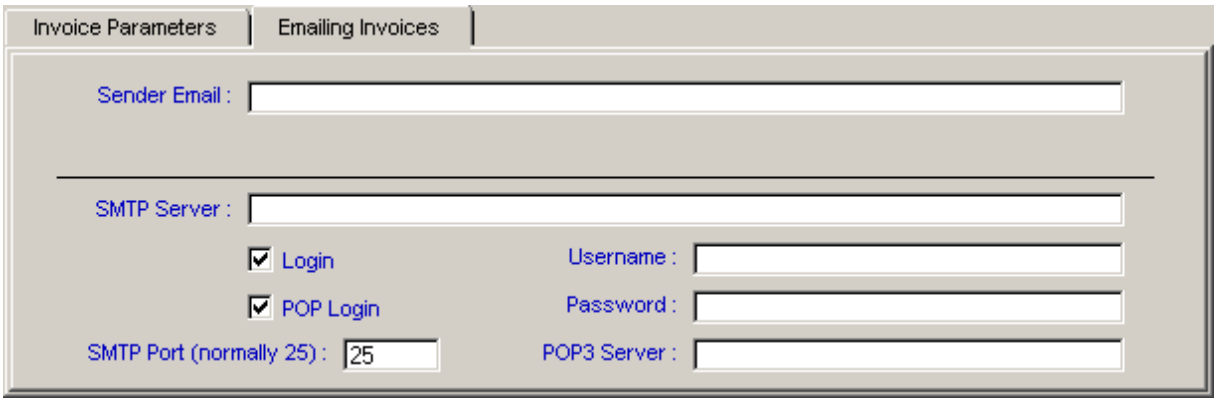

You need your **Username** and **Password**, and the names of your outgoing (SMTP) and incoming (POP3) Email servers. Note that some servers do not require a POP3. The above screen allows you to setup these emailing parameters.

- To enter the Username and Password, you must click the Login check box.
- To enter the **POP3 Server**, you must click the POP Login check box.
- The **Sender Email** is required and **must match** your valid Internet Email account address on the SMTP server you are connected to. If your members reply to the invoice, this Sender Email address will be used along with a return address name that will be the Return Address Name of the facility to which the account belongs.
- The SMTP Port is normally 25. For AOL and Earthlink, the SMTP Port may need to be 587.
- Your ISP account needs to be one which allows the "relaying of emails". Free email accounts normally do not permit this and if you have a free email account, you most likely will need to upgrade your account.

How to Find Your Email Server Names

- **Outlook Express:** Click Tools / Accounts. Select the mail account and click Properties. Then click Servers and all the information you need is on this Servers page. Note that Username is what Outlook calls Account Name.
- **Eudora:** Click Tools / Options. Click Sending Mail to see your SMTP Server name. Click Receiving Mail to see your POP3 Server name under what Eudora calls Mail Server. Your Username is under what Eudora calls Login Name.
- **AOL:** If you are using an AOL account, do not check the POP Login and do not enter a POP3 Server name.

Groups and Subgroups

Within **SportsBM**, you can assign each athlete to a group and optionally to a subgroup. These groups are used for athlete reports, such as an attendance report, and are used for the QuickBilling system. You can have an unlimited number of groups and subgroups, and it is recommended that you create easily identifiable names such as Green, Orange, Gold, Sharks, Minnows, etc. These groups usually refer to the training group for each athlete. Within a group, you could further categorize an athlete with a subgroup, such as Novice or Advanced.

SportsBM also stores a second set of groups to maintain compatibility with HY-TEK's **TEAM MANAGER** ***for Swimming*** or HY-TEK's **TEAM MANAGER** ***for Track & Field*** when exchanging athlete rosters.

From the Main Menu, click on **Set-up / Groups and Subgroups**. Click on the **Add**, **Edit**, or **Delete** buttons at the top of the page to make any changes to the groups / subgroups. A "**Code**" can be any **three alpha-numeric characters** and includes a Code Description as well as a designation as to what **type** of code that it represents.

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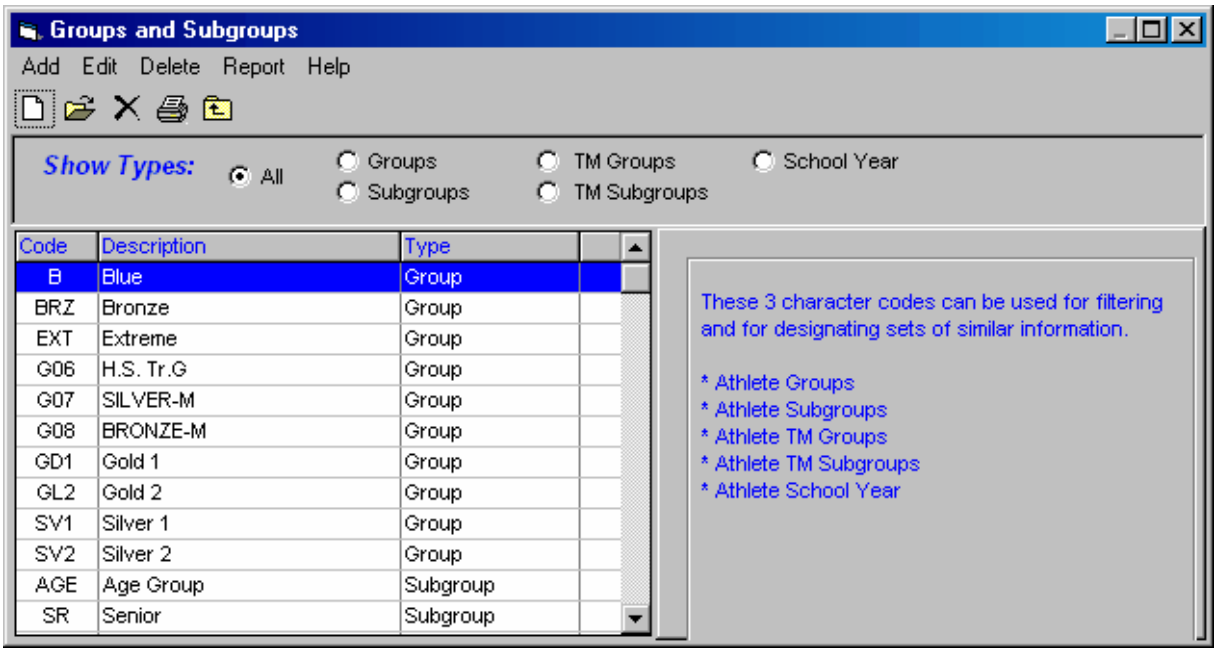

Groups and Subgroups

For example, you might want to designate **groups** of athletes based on the amount of dues they pay for their training. Or you might want to set up Groups based on the facility that they train at and then use **subgroups** to designate elite, novice, college or master athletes with corresponding dues charges.

You might want to use the **School Year** designation so that when you enter athletes, you can put them into a specific School Year code. Then you could filter Reports and Browsers based on a particular School Year. These are the default School Year codes:

Code	Description	Type	
FR	Freshman	School Year	
JR	Junior	School Year	
SO	Sophomore	School Year	
SR	Senior	School Year	

If you wish to change the School Year designations to numbers such as 9, 10, 11, or 12, just click on Edit or the Edit icon and type in a new code and a new description to make the desired changes.

Invoice Subcategories

If you need more detailed information about a particular invoice category, you can use invoice subcategories. For example, within the Dues category, you may want to know how much was for registration fees. Thus you could receive a check for $100.00 and apply it to the Dues category and then divide it into subcategories of $60 for Training Fees and $40 for Registration Fees.

You can add any desired subcategories and optionally provide a full description. From the Main Menu, click on **Set-up / Invoice Subcategories**. **SportsBM** opens to the following category defaults. Click on the **Add**, **Edit**, or **Delete** commands or Icons to personalize the program for your needs. Click on **Report** for a printout of your Invoice Subcategories.

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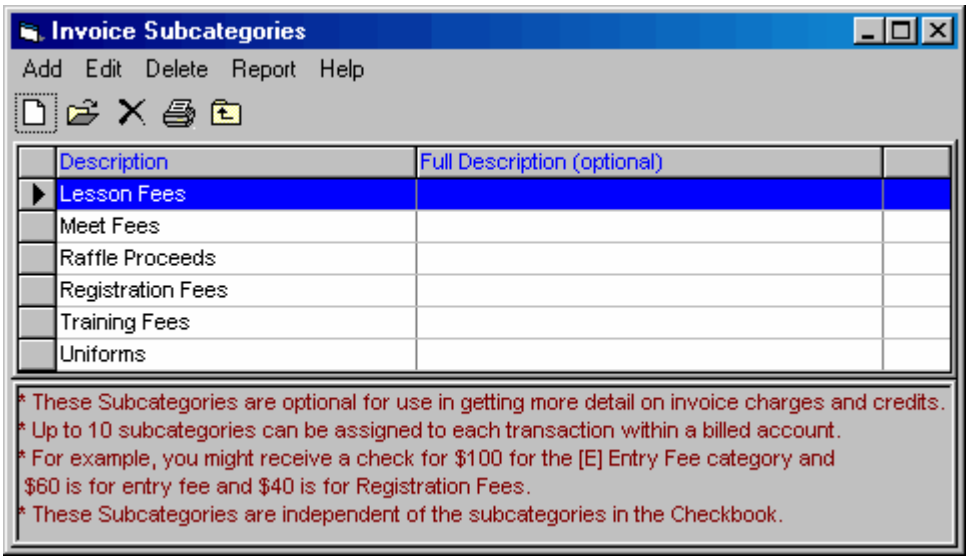

These subcategories will only appear on the Transactions Summaries Report if you click on the radio button "Subcategory" under **Transaction Sort**. The subcategories are used to keep track of different aspects of the larger categories. For instance, under the Travel Fund category, you might have subcategories such as Swim-a-thon, Wrapping Paper Sales, Bingo, etc.

Favorites

Favorite Filters
Invoice Messages
Invoice Email Messages

Favorites are used in Reports and Menus to pre-select such things as the preferred athlete group or the preferred Invoice Message.

Favorite Filters

Many of the **SportsBM** Menus have group filters, and you may have a favorite set that you want to default to.

In order to set up a group of "Favorite Filters" to tell **SportsBM** what to select for me each time I run a Report or look at a Browser, click on **Set-up** from the Main Menu Bar then **Favorite Filters**. From the Main Menu, click on **Set-up / Favorites / Favorite Filter**. Click on the **Add** selection or **Add icon** and name your Favorite Filter and select the settings you wish to associate with that **favorite name**.

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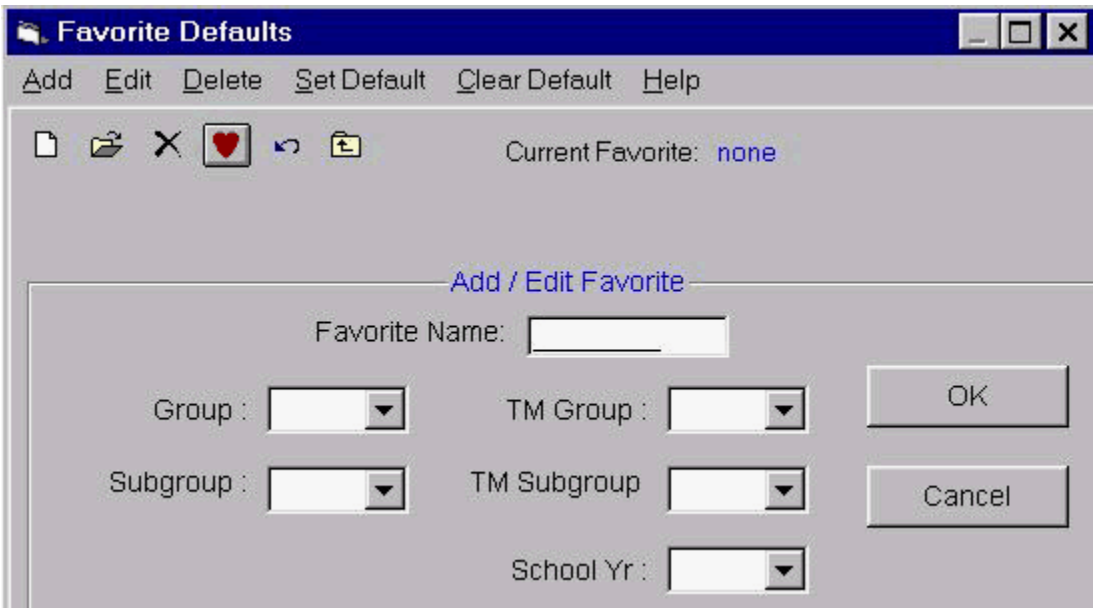

You can enter as many Favorite Filters as you wish. After you have set up a number of Filter Names, highlight one of them and click on **Set Default** or on the **Set Favorite Filter Default** icon (the heart) to set that Favorite Filter as the Default to use. Then, as you choose various reports, browsers, and data entry screens, SportsBM will automatically "fill in" the filters that you have selected using your current Default Favorite Filter. Click on **Clear Default** to remove the current Favorite Filter Default.

You can **Edit** or **Delete** any of the filters in the list to make appropriate changes or just to permanently remove.

Invoice Messages

In order to set up a group of "Invoice Messages" to appear on invoices, from the Main Menu Bar click on **Set-up / Favorite Filters / Invoice Messages**. Click on the **Add** selection or **Add icon** and enter your messages.

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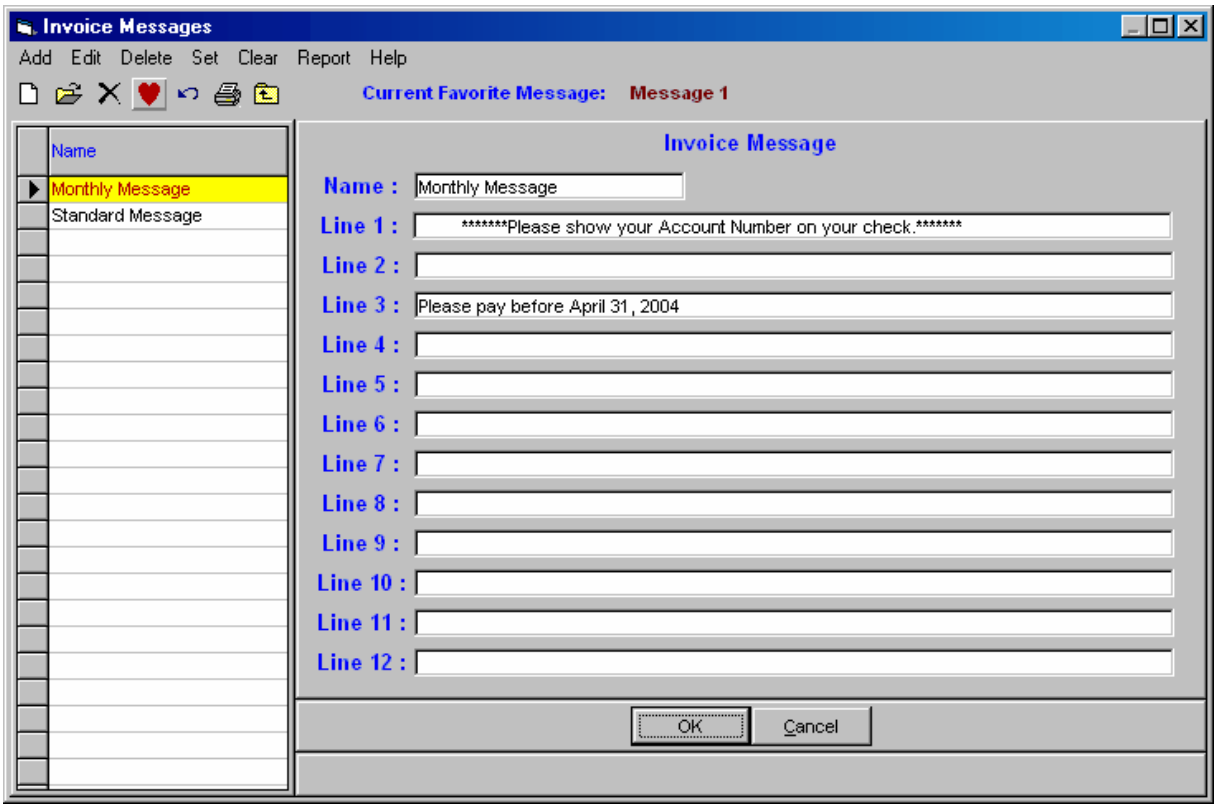

Each message lets you enter up to 12 lines of information. This feature can save you time if you have certain messages that you send at certain times of the year. You can enter an unlimited number of messages; just highlight the desired message on the left and click the Edit icon to make any changes. Click **Set** or the **Heart** icon to select your favorite message to be used on invoices.

Invoice Email Messages

An Invoice Email Message is the text that will appear in the opening paragraph of an emailed invoice. You can create multiple sets of these introductory paragraphs for various sets of invoice emails, From the Main Menu Bar click on **Set-up / Favorite Filters / Invoice Email Messages**. Click on the **Add** selection or **Add icon** and enter your messages.

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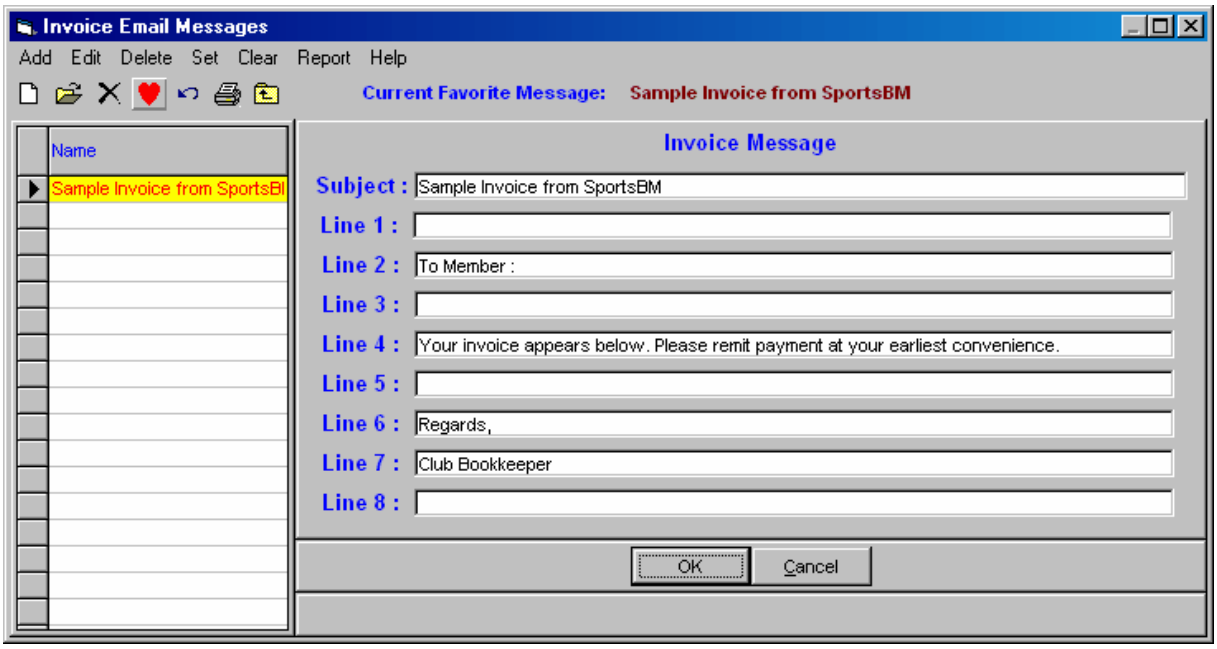

Each email message lets you enter up to 8 lines of information. The subject will be the subject of the invoice with the account number of the account appended to the end of the subject. This feature can save you time if you have special messages that you send at certain times of the year. You can enter an unlimited number of messages; just highlight the desired message on the left and click the Edit icon to make any changes. Click **Set** or click the **Heart** icon to select your favorite message to be used on the current set of invoices to be emailed. In order to send emails with invoices, **it is required that a message be set as the favorite**.

Language Preferences

Sports BUSINESS MANAGER ***for Windows*** gives you the flexibility to "translate" nearly every word on every report. This feature can be used as a language translation from English to any language or as a way to change the word "Attendance List" to just "Attendance". Click on **Set-up** from the Main Menu Bar, and then **Language Preferences**, and then click on **Keywords** or **Phrases**.

You may change any of the English phrases or words to the language of your choice. English, Spanish, French, and German key words and phrases are planned to be an automatic selection, but may not be available in your version. If not, then you can still edit each word or phrase as you wish. To change any word or phrase, click on the word in the second column and edit the word. Because there are space limitations on many of the reports, each word or phrase has a limit on the number of characters it can be. This character limit is listed to the right of each word in the Language Browser.

The language changes you make are saved in the directory where **SportsBM** is installed. Please note that this revised "language set" **is not included** in the backup of the database if you are transferring the database to another computer.

Options

Click on **Set-up**, then **Options**, and SportsBM will display additional ways for you to further customize your settings.

Import Picture

The **Import Background Picture** option allows you to choose any Bitmap Picture that you want to use

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for a Background Picture. A Bitmap Picture file has the file extension BMP. Once you click on **Set-up**, **Options**, and then **Import Background Picture**, SportsBM will ask you to choose the Drive and Directory where the Picture file is located. Click on **OK,** and SportsBM will import that file and use it as the background for your SportsBM Desktop. If the imported picture causes an error, use Windows Explorer to delete the file named SportsBM.bmp from the directory where SportsBM is installed (usually C:\hy-sport\SportsBM), and then start SportsBM again.

Sales Tax

Include your state's **Sales Tax** for taxable items. This will only be used for the 4th invoice category which is initially named Taxable Sales. When a charge transaction is entered using the 4th invoice category, the taxable amount is internally calculated and stored. When adding a transaction to an account, you enter the full amount of the transaction including the sales tax.

Total amounts posted to **taxable sales** should include the sales tax amount in the figure. **SportsBM** will "back out" the sales tax amount from the total when doing the monthly sales tax report (part of the Financial Summaries Report). The Sales Tax Report assumes that the amounts posted for each taxable sale include the sales tax amount. In addition, the sales tax is calculated from the amount charged, not the amount collected.

To set-up your state's sales tax, from the Main Menu, click on **Set-up / Facility and Invoice Set-up**. Now go to the bottom right of the screen under **Invoice Parameters** and enter the state sales tax percent.

Click **Save Invoice Data** to save your work.

Date Formats

SportsBM will use the Date Format that you have set up through Windows. To check on or change your Windows Date Format, first exit from SportsBM and then go to **Start** and then **Control Panel** and then **Regional Settings** and then click on the **Date tab**.

If you change the Date Format, Windows will ask you to Restart Windows before the new date format takes affect.

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Team Registration Online

This option is only available when **SportsBM** is setup with **Swimming** as the Sport within System Preferences.

No more filling out paper sign up and registration forms each year to sign up or register your swimmers! Just complete our easy to use Team Registration menu from your computer and submit it with your registration payment ONLINE! Then your team administrator can download that information directly into **SportsBM** - no keying, no misspellings - just a couple mouse clicks to import your team's registration sign ups into your **SportsBM** database.

The Active Network, the parent company of **HY-TEK Sports Software** and the leader in internet based team registration, offers the most robust and complete swim team registration and payment processing platform available. Use **Team Registration Online (TRO)** to collect your team member registrations and information, and simplify your team management process.

NOTE: You must be connected to the Internet before continuing with this process.

Demo

Download and install the current **SportsBM 5.1** and click on **Team Registration Online** at the top of the Main Menu and then click on the **Download Demo Swimmers** button to download the information for swimmers that have been previously entered into the registration sign up process. If you wish to demo how you would customize your web page (called the back end) of the **Team Registration Online** process, contact the Active Network by emailing Shannon.Turner@activenetwork.com or visit us at www.activeendurance.com.

How to Use Team Registration Online

How to Use Team Registration Online

Registered Users

Before importing the information from **Team Registration Online**, please make sure you have received the User Name and Password from Active. Then click on **Team Registration Online** at the top of the Main Menu or click on **File / Import / Team Registration Online**. After you have entered a date range to check for new sign ups, click on the **Download Team Registration** button and **SportsBM** will connect with the Active web site and download the registered groups and registration sign ups that you previously set up with Active. If you have more than one set of registered groups defined, then **SportsBM** will ask you to select the groups you wish to import such as shown below.

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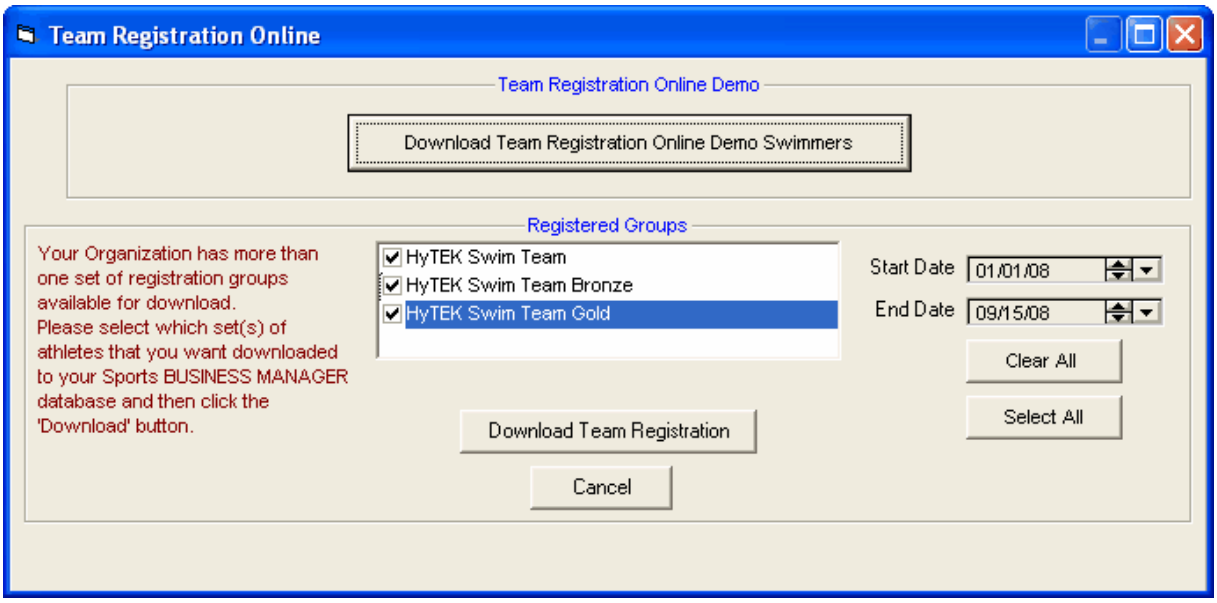

In the sample above, there are three Registered Groups. You may use the Clear All button to remove all the check marks if there are many in the list and then check the ones you want to download. After making your selections, click the Download Team Registration button and **SportsBM** will download and display the new sign up/registrations that have taken place based on the Start and End dates you specified (see the screen shot below).

The **End Date** defaults to Today and the **Start Date** defaults to 30 days before Today. The Start Date is the **key filter** you would use to exclude registration sign ups that you have previously downloaded.

NOTE: Just because **Team Registration Online** indicates a swimmer already exists in your database does not mean that some of his/her information has not been changed online. In general, it would make sense to import the swimmers that are in the **Team Registration Online** import whether they already exist in your database or not in order to update the existing swimmer information with "new" information that may have been entered online.

CAUTION: If you import the **Team Registration Online** swimmers and later edit their information using **SportsBM** and then subsequently import the same information again, **SportsBM** will overlay the existing information about that swimmer with the information that was in the **Team Registration Online** import. For example, if you change a swimmer's telephone number because the Mom sent you an email, the swimmer's "old" telephone number in the online data would replace the one you just manually updated.

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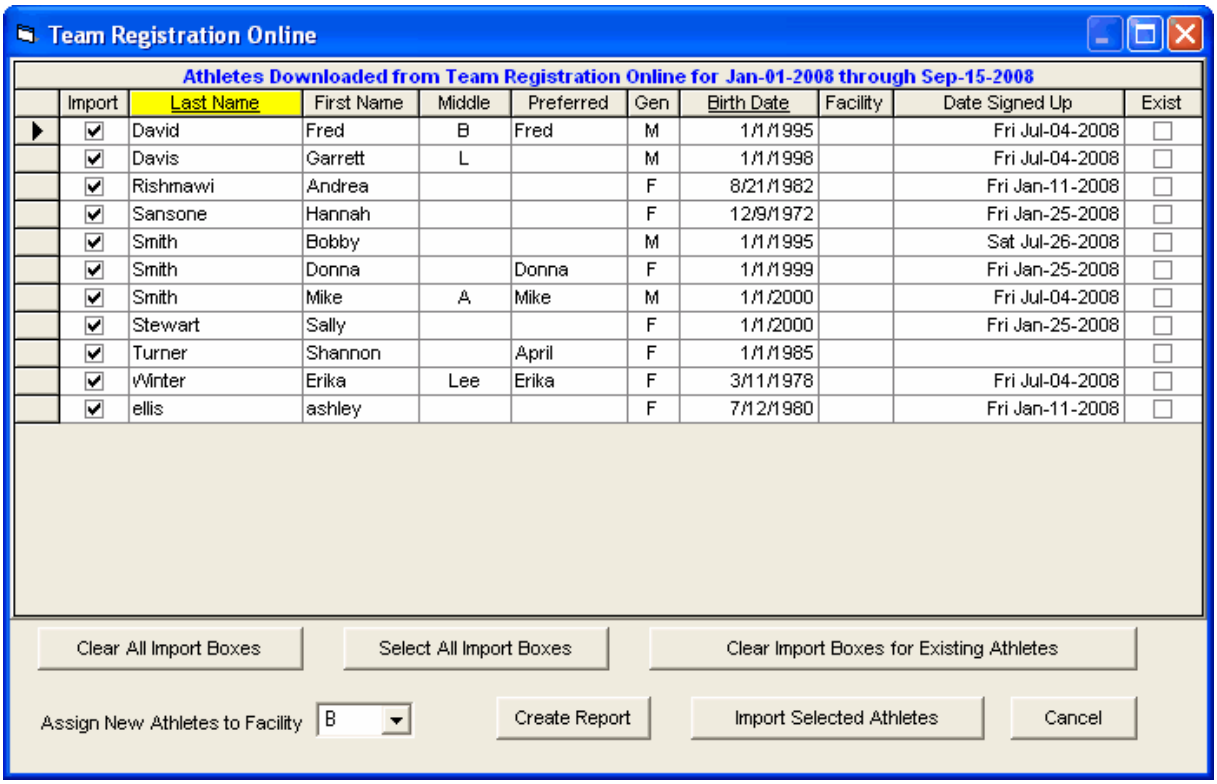

Import	Last Name	First Name	Middle	Preferred	Gen	Birth Date	Facility	Date Signed Up	Exist
☑	David	Fred	B	Fred	M	1/1/1995		Fri Jul-04-2008	☐
☑	Davis	Garrett	L		M	1/1/1998		Fri Jul-04-2008	☐
☑	Rishmawi	Andrea			F	8/21/1982		Fri Jan-11-2008	☐
☑	Sansone	Hannah			F	12/9/1972		Fri Jan-25-2008	☐
☑	Smith	Bobby			M	1/1/1995		Sat Jul-26-2008	☐
☑	Smith	Donna		Donna	F	1/1/1999		Fri Jan-25-2008	☐
☑	Smith	Mike	A	Mike	M	1/1/2000		Fri Jul-04-2008	☐
☑	Stewart	Sally			F	1/1/2000		Fri Jan-25-2008	☐
☑	Turner	Shannon		April	F	1/1/1985			☐
☑	Winter	Erika	Lee	Erika	F	3/11/1978		Fri Jul-04-2008	☐
☑	ellis	ashley			F	7/12/1980		Fri Jan-11-2008	☐

You can **sort** the list you downloaded either by **Last Name** or **Birth Date**. You may choose which ones you wish to import into your **SportsBM** Database or click on the **Select All Import Boxes** button. Note the Facility column in the list. If the facility is blank, then the **Assign New Athletes to Facility** combo box choice will be used to assign the Athlete and Family to a facility. **SportsBM** will also let you know if any of these swimmers already exist and give you the choice of updating their information already in your **SportsBM** Database. Click on the **Create Report** button to create a report of the basic athlete and address information that has been downloaded from **Team Registration Online**. This gives you a preview of what is available to be imported. Make your selections of what swimmers you want to import using the check boxes to the far left and then click on the **Import Selected Swimmers** button. **SportsBM** will then add any new swimmers and families to your **SportsBM** Database and edit swimmer and family information that already exists for the selected swimmers.

NOTE: **SportsBM** decides that a swimmer exists based on a match of ***Last Name, First Name, Middle Initial (if not blank)*** **and** ***Gender***.
SportsBM decides that a family exists for this swimmer based on a match of either the ***Primary Last Name*** **and** ***Primary First Name of parent 1*** or a match of the ***Primary Last Name*** **and** ***Primary First Name of parent 2***.

After the import is completed, a message box appears with the statistics of how many swimmers were added and edited. This message box gives you the option to create a report that describes which swimmers were added, which swimmers were edited, and which swimmers were not imported due to insufficient information. It is highly recommended that you create and print this summary report.

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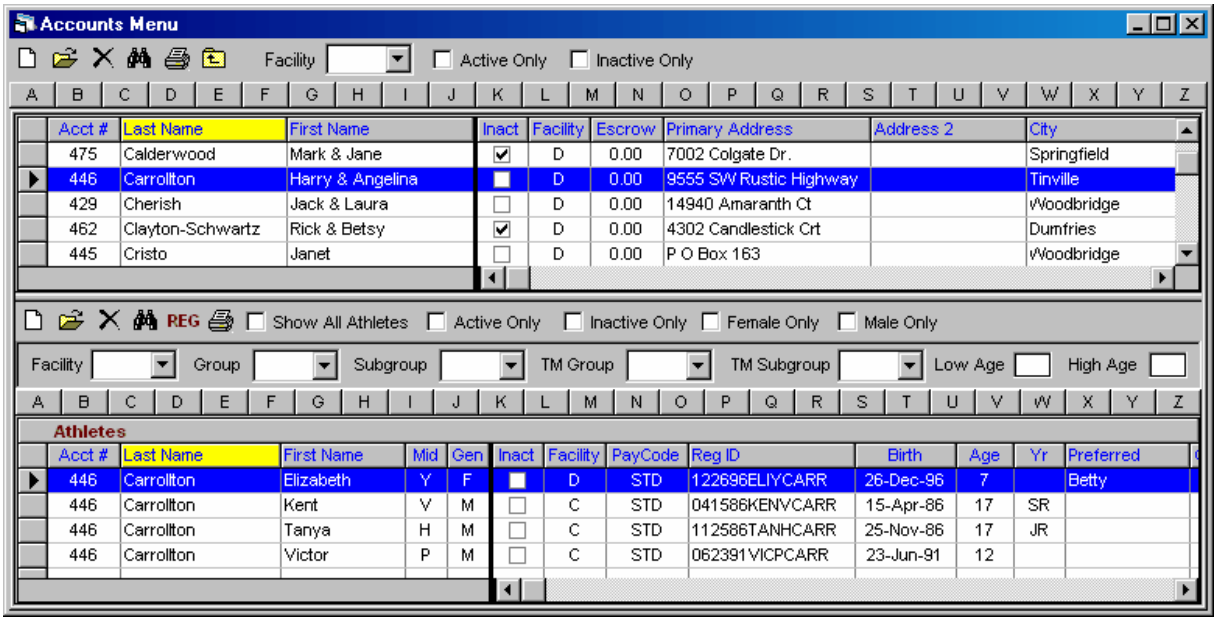
Accounts Menu/Browser

Click on **Accounts** from the Main Menu Bar, and **SportsBM** will display the Account Browser with athletes at the bottom.



The Account Browser is a scrolling grid listing accounts and provides a quick way to view accounts and basic information about them. You can use the Account Browser to quickly locate information about a particular account by scrolling down the list of accounts. Or, instead of scrolling down the list, you can **locate** a specific account quickly by clicking on the top alphabet row. For example, click on the **T**, and **SportsBM** will jump to the first account whose last name begins with a **T**. To edit account information directly from the Browser or "grid", just double click on the account. Or, use the Binoculars icon to "find an account" – just type in the first few letters of an account and **SportsBM** will find the first matching account.

To select from various Administrative and Financial reports, click on **Reports** on the Menu Bar. To go directly to Administrative reports, click the Printer Icon for Accounts or Athletes. If transactions are showing in the lower grid, clicking the printer icon creates an invoice for the selected account. If history transactions are showing in the lower grid, clicking the printer icon creates an transaction history report for the selected account. Please click Here for detailed information on Reports and report formats.

When an account is selected, only athletes "attached" to that account are displayed. **To show All Athletes**, click the "Show All Athletes" check box.

NOTE: You can **resize** the split window by clicking on the bar between the upper and lower screens and moving it up and down.

Filtering Information

You can reduce the number of accounts that are included in the upper grid list by "filtering" the information by:

- Facility
- Active Status Only
- Inactive Status Only

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For example, if you wish to show ONLY Active accounts at one facility in the browser, select the Facility from the facility combo box at the top and check the Active Only box, and **SportsBM** will show only those accounts that meet this filtering criteria.

If athletes are displayed in the lower grid and you have checked **Show All Athletes**, you can filter the athlete list with the following choices:

- Facility
- Active Only
- Inactive Only
- Female Only
- Male Only
- Group / Subgroup
- TM Group / TM Subgroup
- Low / High Age

Browser Sort Options

The Account Browser is initially sorted alphabetically by Last Name. But you may **sort** the scrolling list by other criteria by clicking on **any** column title. For example, to **sort** by **Account Number**, just click on the column heading labeled **Acct #**. The same goes for the Athlete Browser. You can click on any column title (except Acct #) and sort on that column.

Active and Inactive

The Account Browser defaults to include both Active and Inactive Accounts. The activity status is displayed in the column titled "Inact". If an account's "Inact" box is checked, the account is inactive. If you click the box in the column, the activity status will switch. This is the easiest way to change the activity status, rather than clicking Edit and then changing the activity status.

Click on any topic for more information.

Athletes
Transactions
History
Daily
QuickBilling
Invoices
Reports
Labels
View

All accounts can be filter by Facility (drop down menu), **Active Only** check box, or **Inactive Only** check box.

The Accounts Menu has a split screen with the top portion dedicated to the Account/Family. From left to right, the screen displays **Account #**, **Last Name**, **First Name**, **Inactive**, **Facility**, **Escrow**, **Primary Address**, **Address 2**, **City**, **State**, **Postal Code**, **Country**, **E-mail**, **Home Phone**, **Office Phone, Cell Phone**, **Fax Phone**.

The bottom half of the screen changes according to your selection of subject area.

Click Here to **Add / Edit New Account**

Click Here **to Delete an Account**

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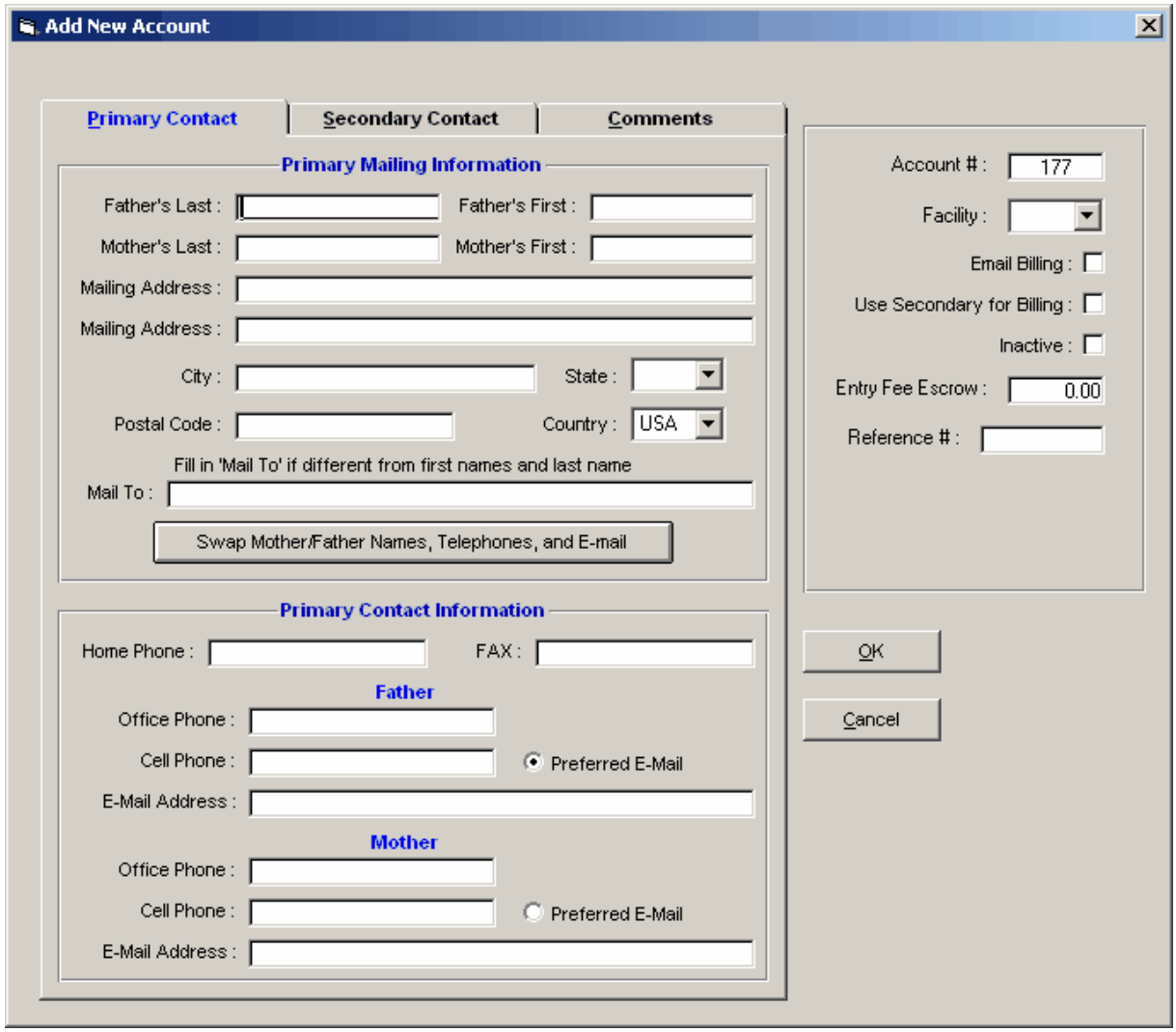
Add or Edit Accounts/Families

There are two ways to enter accounts/athletes in your database:

- Manually, by keying in the information
- By Importing Accounts/Athletes

To key-in account information into your Database, go to the top of the screen and click on the **Add** icon.



NOTE: You must first enter an account **before** adding an athlete.

It is helpful to fill in all Account information, but the only required fields are the Primary Last Name and Facility Code; all other Account information is optional.

- Two sets of **Mailing** and **Contact** Information, Primary and Secondary, are available. Click on the appropriate tab to enter the information. Under the **Primary Contact** tab, enter the basic information. Only enter a "Mail To" if it is different from the first and last name. If you do not enter a "Mail To" name, the program will default to using the Primary Father's Last Name, Primary Father's First Name, Mother's Last Name if different, and Mother's First Name when a

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"Mail To" is required. For example, the "Mail To" might be Tom & Mary Jones or Tom Jones & Mary Leavitt if the last names are different.

- **Comments -** Click on the **Comments** tab and type in any information you wish to note about an Account. **NOTE**: this information cannot be printed in any report and is limited to 240 characters.
- If you have the **Email Invoices Option**, check the **Email Billing** check box for those accounts that are to receive their invoices via Email. You can designate either the father's or the mother's email to be used for emailing invoices.
- Check the **Use Secondary for Billing** box if you wish to use **Secondary Contact Information** for billing purposes (click on the Secondary Contact tab and enter the data).
- Check the **Inactive Box** if you wish to make the account inactive. This action will not remove any data.

NOTE: SportsBM automatically assigns an account number. You may edit this account number as long as it does not duplicate one already being used.

Entry Fee Escrow

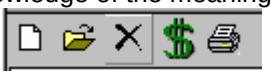
Enter a specific Entry Fee Escrow amount here if desired.

Edit an Account

To edit an account's information, select the Account you wish to edit. Then either double click on the Account or click **Edit** or click the **Edit icon**. Then make the changes as you wish, and click on the **OK** button to save those changes.

Account Icons

Knowledge of the meaning of the following icons is central to effective use of **SportsBM**.



- The first icon, the folded sheet of paper, means "To Add".
- The second icon, the open folder, means "To Edit".
- The third icon, the big X, means "To Delete".
- The fourth icon, the dollar sign, means "To Display/Edit Balances".
- The fifth icon, the printer, means "To Print" or create a report.

Entry Fee Escrow

When you add or edit an account, you can enter an **Entry Fee Escrow** amount which is used on the invoice to automatically collect advance funds for entry fees.

Many teams pay their team's entry fees in advance of the meet and then bill their members. The escrow amount will enable you to collect money from your members as an advance deposit on fees that you will deduct from their accounts later. The amount you put here will be used when printing invoices to re-establish the escrow balance when the balance in the entry fee account goes below the trigger amount. The amount you place can be different for every account and should be proportional to the number of athletes in the account and the number of meets which they attend. For example, if the trigger amount is -10.00 and the escrow amount is $40.00 for a particular account and the entry fee balance is a $4.50 credit (which is less than the -$10.00 escrow trigger), then $35.50 would be added to the balance due on the invoice to bring the escrow back to $40.00. If the balance was a $10.01 credit, then nothing additional would be added to the invoice because it is greater than the trigger amount by one cent.

Enter your own internal **Reference #** here. A cross-reference number is available for each account for referencing other internal accounting systems within your organization and only shows up on invoices.

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Use of the reference # is optional.

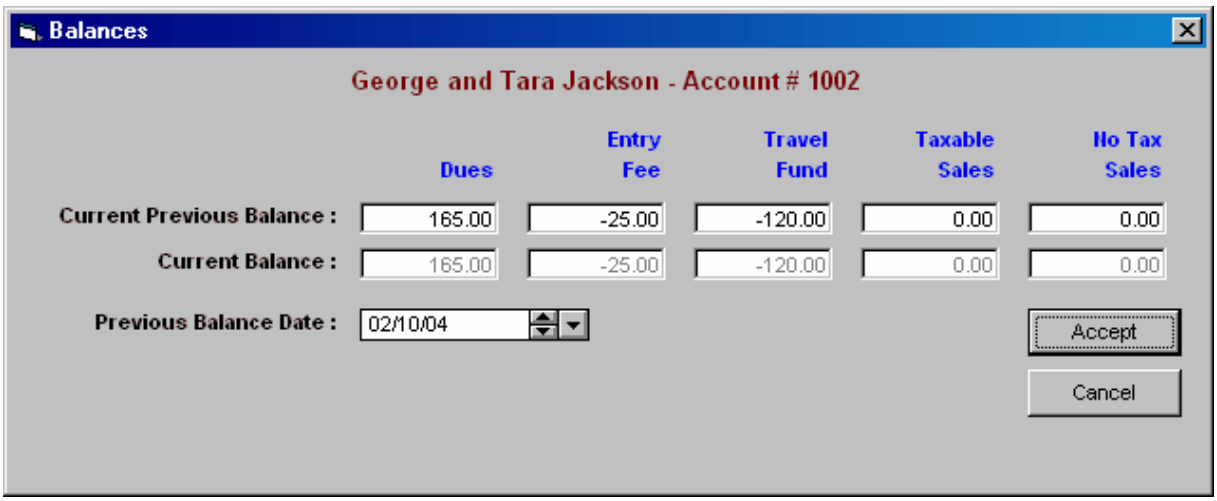
Click on the **OK** button to save the information that you have entered for a given account.

Delete an Account/Family

To delete an Account / Family, click on **Accounts** from the SportsBM Main Menu Bar, highlight the correct Account / Family. Now click on the **Delete icon**. SportsBM will prompt you to make sure you wish to make the deletion. **If you delete an account, all athletes and transactions associated with the account will also be deleted**. If you do, just click on the **Yes** button to finalize the deletion in your SportsBM Database. This also deletes All current and history transactions associated with the account. Please note this action is not reversible. The normal procedure is to just make the Account "Inactive" by checking the Inactive check box.

New Account Balance

When entering a new account, you can enter the previous balance from a prior accounting system, if any, for each of the five invoice categories. This also updates the Day 1 previous balance for a new account. A minus amount means it is a credit balance.



To enter previous balances, from the Main Menu, click on Accounts / Transactions. Then click the dollar sign icon (mid screen) to display an account's Balances. Enter the accounts balances from the prior accounting system into the Current Previous Balance row. To edit the Day 1 balance, click on History at the top of the Account Menu and then click on the dollar sign icon. If there are no history transactions, the Day 1 Balance and the Current Previous Balance are the same.

Add an Athlete to an Existing Account

Click on **Accounts** from the Main Menu Bar and then click on **Athletes** at the top left to view the Athlete Browser at the bottom of the page. Go to the middle of the screen for athletes and click on the **Add** icon to add an athlete. From this screen, you can use icons to Add, Edit, Delete, Find (binoculars), REG (USS Swimming registration only), and Print. To search the entire athlete database using the Find icon, you must first click the "Show All Athletes" box. You can filter all Athlete information by using the Active/Inactive and Gender check boxes as well as filtering by Facility, Group, Subgroup, TM Group, TM Subgroup and Low and High Age Ranges.

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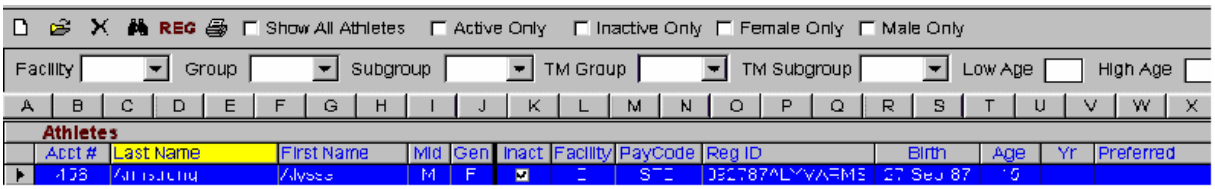
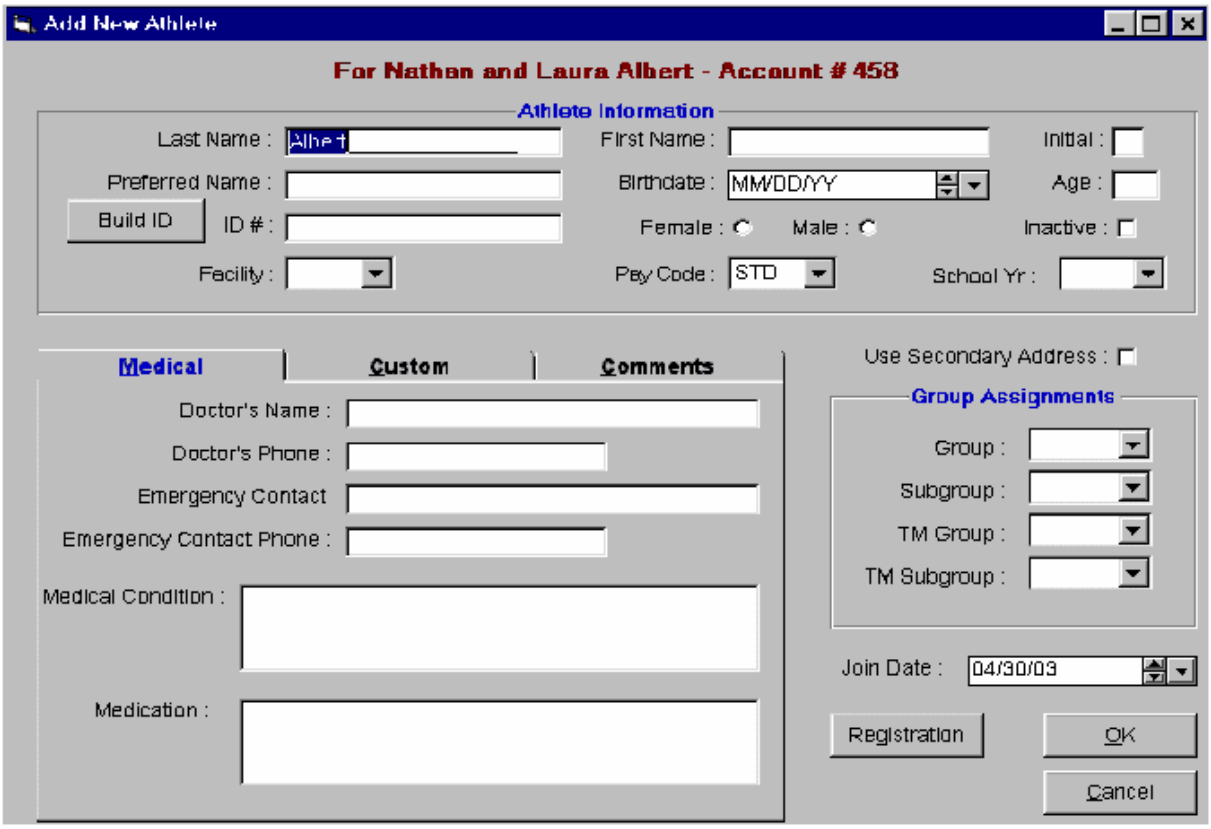


NOTE: You must first enter the athlete's parent account before adding an athlete's personal information. All Mailing and Contact information is entered when you add or edit an account.



You must provide the basic administrative information about the athlete: last and first names, gender, and facility.

If you are entering **age group** athletes, it is important to enter the athlete's **birth date**. **SportsBM** will calculate the athlete's **age** based on today's date and will continually update that age.

The Build ID feature is only available for Swimming with a Team Registration Type of **USS** for USA Swimming, **AUST** for Australian Swimming, **NZSF** for New Zealand Swim Federation, or **SSA** for Swimming South Africa.

Pay Code

From the Pay Code combo box, select a Pay Code. The pay code is used for the **QuickBilling** system. The basic concept of the system is to charge each athlete according to a four letter **Pay Code**. When you first add an athlete to the database, he or she is automatically given the **STD** (Standard) pay code. This standard pay code tells **SportsBM** to refer to the fees assigned to the athlete's group / subgroup combination. Each group may have a separate fee for the first, second,

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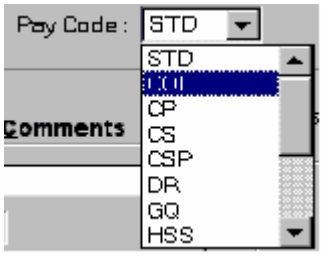
third, fourth, and fifth athlete in any given account. If you do not have QuickBilling, then this entry will be of little use. However, the four character default code **STD** (standard) is placed here regardless. **SKP** (skip) means do not charge and do not post anything when using **QuickBilling**.



Medical Information

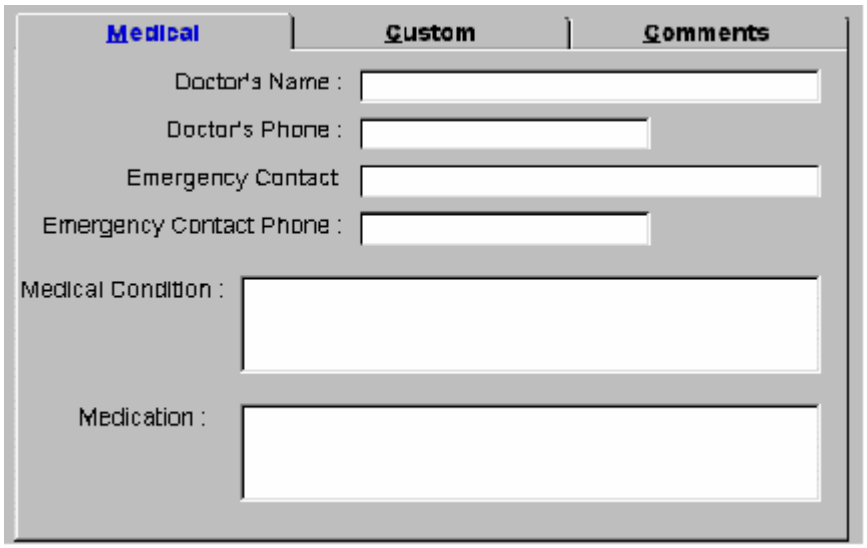
Click on the **Medical** tab and enter medical information specific to the athlete.

Custom Information

Click on the **Custom** tab and enter information for up to 3 Custom Field names. To set up your Custom Athlete Field names, click on **Set-up / Preferences / Set-up Preferences**.

Comments

Click on the **Comments** tab and type in any information you wish to note about an athlete. Note: this information cannot be printed in any report.



High School or College Team

If you are entering High School or College athletes, be sure to enter their **School Year**. You can customize how you describe a School Year by adding a School Year Code (For example, you may want to enter School Year Codes of FR, SO, JR, and SR or 9, 10, 11, and 12) - for more information on how to add Codes, see Groups and Subgroups.

Additional Optional Information

Click on the **Inactive** box to declare an athlete as "inactive.

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Group Assignments

Click on the desired combo boxes and assign the athlete to any of the four types of groups. It is very useful to at least assign all athletes to a Group. The Subgroup and TM Group / Subgroup are optional.

- Group
- Subgroup
- TM Group
- TM Subgroup

Join Date

Type in the date or use the calendar menu to select the athlete's joining date.

Registration Button

Click the Registration button, and the USS Registration form will appear.

Click on the **OK** button to save the information that you have entered about a given athlete that you are adding or editing.

To Edit or Delete an Athlete

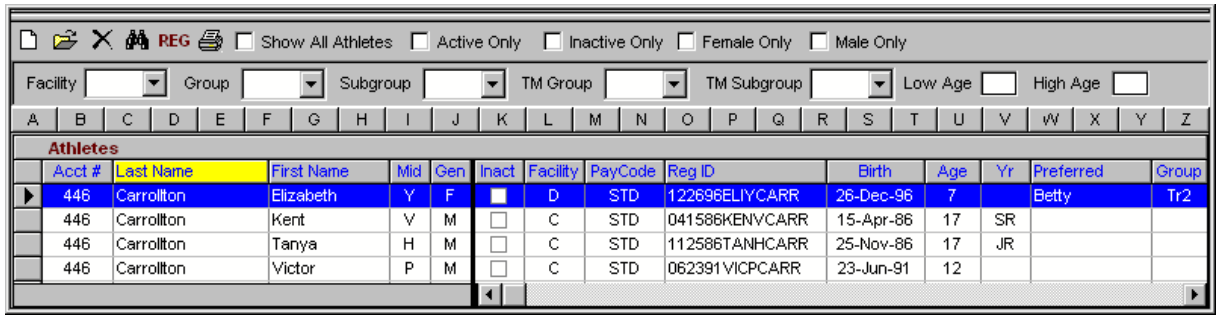
To edit an athlete's information, click on **Accounts** from the **SportsBM** Main Menu Bar, highlight the correct account, and then highlight the athlete in the Athlete Browser at the bottom of the page. Now either double click on the athlete's name or click on **Edit** or the **Edit icon**. To delete an athlete, highlight the athlete in the Athlete Browser at the lower half of the screen, and then click on **Delete** or the **Delete** icon. **SportsBM** will ask for confirmation. Normally you would just make the athlete "Inactive", rather than deleting him/her.

Athlete Browser

From the Main Menu, click on **Accounts**, and then click on the Add command or Add icon <u>at the bottom half of the screen</u> to view the Athlete Browser.

The top part of the Athlete screen includes the standard icons for Adding, Editing, Deleting, and Finding; if you wish to create a USA Swimming Registration card for the highlighted Athlete, click on **REG**.

You can filter Athletes by the check boxes: **Show All Athletes** will show all athletes in the database, not just the ones associated with the current account. You can also filter by **Active/Inactive** Status, Gender Facility, Group, Subgroup, TM Group, TM Subgroup, and a Low Age to High Age range..



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Edit or Delete an Athlete

Edit an Athlete

To edit an athlete's information, click on **Accounts** from the **SportsBM** Main Menu Bar, highlight the correct account, and then highlight the athlete in the Athlete Browser at the bottom of the page. Now either double click on the athlete's name or click on **Edit** or the **Edit icon**.

Delete an Athlete

To delete an athlete, highlight the athlete in the Athlete Browser at the lower half of the screen, and then click on **Delete** or the **Delete** icon. **SportsBM** will ask for confirmation. Normally you would just make the athlete "Inactive", rather than deleting him/her.

Registration

If you are a USA Swimming team, click on **REG** next to the printer icon in the Athlete Browser when you want to enter Registration information according to the USA Swimming National Registration Guidelines. You can later Export your club's registration information to your LSC for subsequent integration into the National Database. Please click Here for more information about **Exporting Registration**, and Here for information on **Registration Preferences**, and Here for information about the **Registration Report**.

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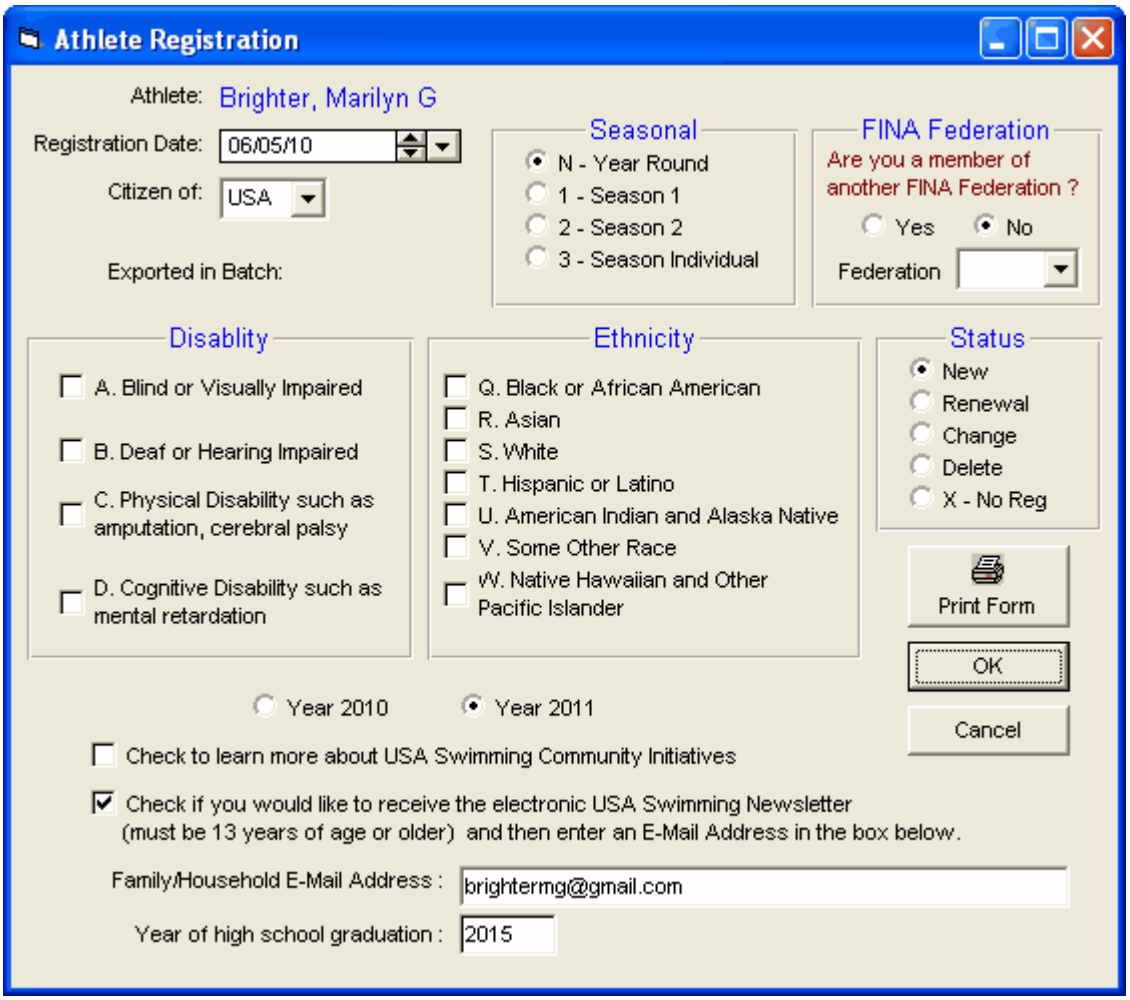
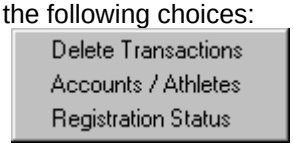


Global

There are several global utilities designed to save you time. Click on **Accounts** from the Main Menu Bar and then click on Global to display the following choices:



Global Delete Transactions

Delete Transactions allows you to delete a set of transactions that may have been posted in error. For example, you may have accidentally run **QuickBilling** a second time and thus billed all athletes twice for the same month's dues. From the global delete, you could select the transactions to delete and remove them all with one mouse click.

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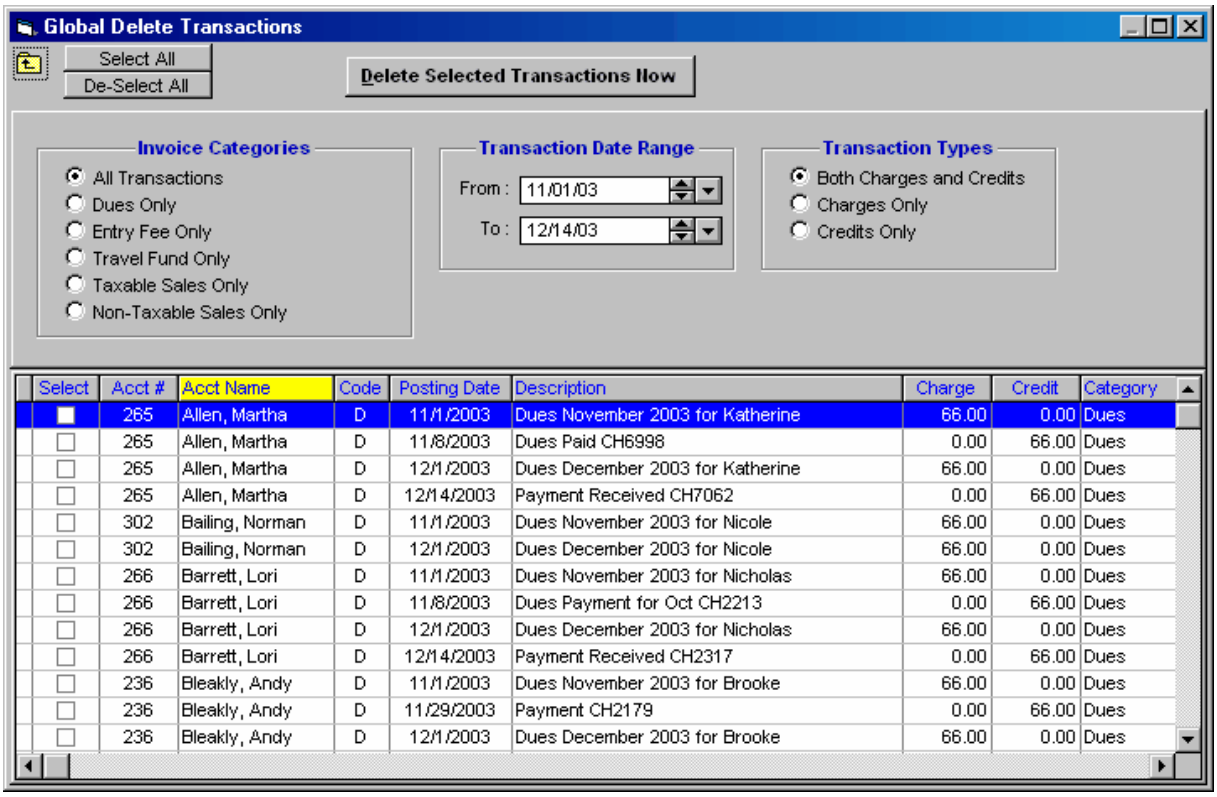

Select	Acct #	Acct Name	Code	Posting Date	Description	Charge	Credit	Category
☐	265	Allen, Martha	D	11/1/2003	Dues November 2003 for Katherine	66.00	0.00	Dues
☐	265	Allen, Martha	D	11/8/2003	Dues Paid CH6998	0.00	66.00	Dues
☐	265	Allen, Martha	D	12/1/2003	Dues December 2003 for Katherine	66.00	0.00	Dues
☐	265	Allen, Martha	D	12/14/2003	Payment Received CH7062	0.00	66.00	Dues
☐	302	Bailing, Norman	D	11/1/2003	Dues November 2003 for Nicole	66.00	0.00	Dues
☐	302	Bailing, Norman	D	12/1/2003	Dues December 2003 for Nicole	66.00	0.00	Dues
☐	266	Barrett, Lori	D	11/1/2003	Dues November 2003 for Nicholas	66.00	0.00	Dues
☐	266	Barrett, Lori	D	11/8/2003	Dues Payment for Oct CH2213	0.00	66.00	Dues
☐	266	Barrett, Lori	D	12/1/2003	Dues December 2003 for Nicholas	66.00	0.00	Dues
☐	266	Barrett, Lori	D	12/14/2003	Payment Received CH2317	0.00	66.00	Dues
☐	236	Bleakly, Andy	D	11/1/2003	Dues November 2003 for Brooke	66.00	0.00	Dues
☐	236	Bleakly, Andy	D	11/29/2003	Payment CH2179	0.00	66.00	Dues
☐	236	Bleakly, Andy	D	12/1/2003	Dues December 2003 for Brooke	66.00	0.00	Dues

To filter your transaction list, pick a date range, an invoice category, and a Transaction Type. Click the **Select** check box for each transaction you wish to delete and then click **Delete Selected Transactions Now**.

Global Accounts / Athlete

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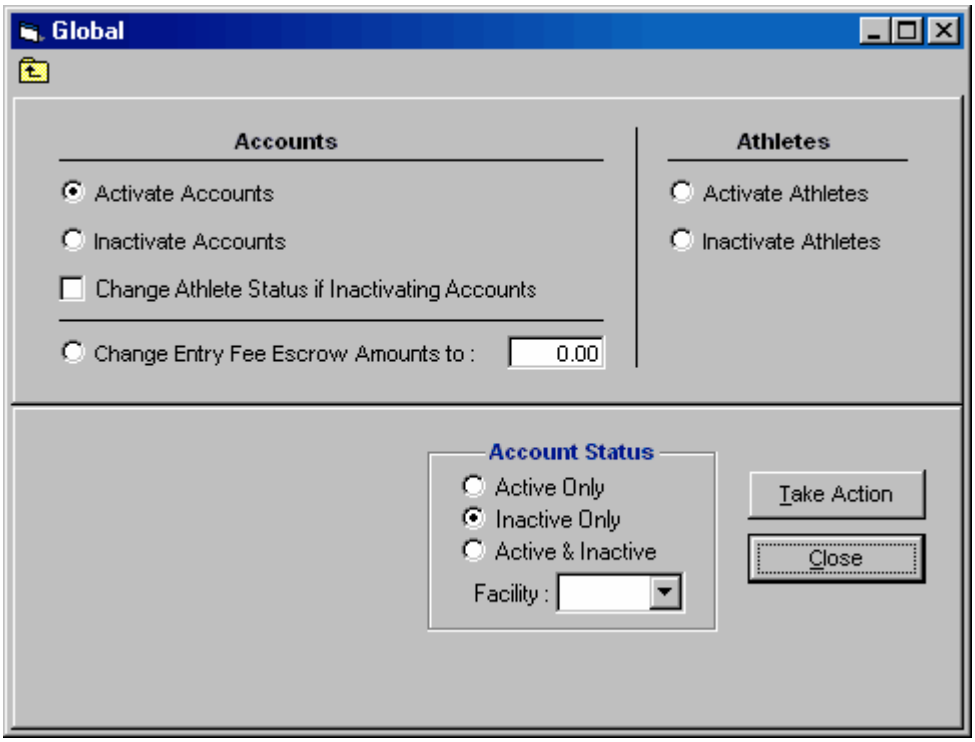

The **Accounts / Athletes** global allows you to quickly activate or inactivate a set of accounts, activate or inactivate a set of athletes, or to update the **Entry Fee Escrow** Amounts for multiple accounts.

When you start a new season, you might want to Inactivate a set of accounts and if so, you have the option to also Inactivate the athletes attached to those accounts at the same time if you check the **Change Athlete Status if Inactivating Accounts** check box.

To change all accounts to a $100.00 escrow balance, click **Change Entry Fee Escrow Amounts**, click **Active Only**, leave the **Facility** blank to mean all facilities, and then click **Take Action**.

Global Registration Status Update

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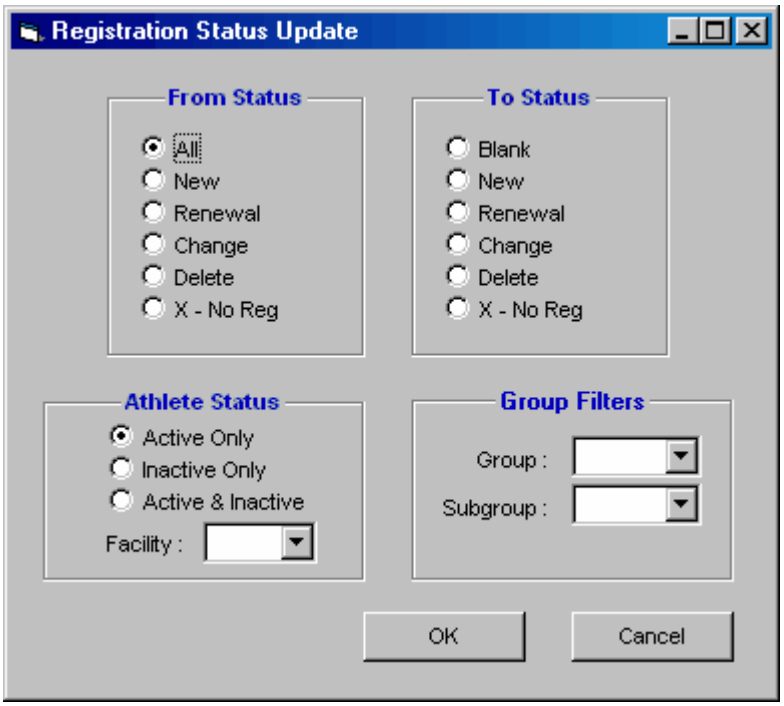

Registration Status global allows you to change the registration status of any set of athletes. For example, at the beginning of the season, you might want to change the registration status of all active athletes to Renewal. After doing this, if you run the Registration report, all the active athletes will be on the report and if your database is setup for USA Swimming, all active athletes will be included in an Export if you export Registrations.

View

From the Main Menu, click on **Accounts / View**. By clicking on **View**, the following choices appear:

- **Last Account Entered First** - checking this item will switch the order of accounts; for example, the last account will appear at the top of the accounts list. Note: Account numbers will not change. When SportsBM is restarted, the original account order will appear.

- **Last Athlete Entered First** - checking this item will switch the order of athletes; for example, the last entered athlete will appear at the top of the athletes list. When SportsBM is restarted, the original account order will appear.

- **Show Athlete Age** - check this item for an "Age" column to appear in the Athlete menu.

- **Show Athlete Birth Date** - check this item for a "Birth" (birth date) column to appear in the Athlete menu.

- **Show Athlete School Year** - check this item for a "Yr" (School Year) column to appear in the Athlete menu.

- **Show Registration ID** - check this item for a "Reg ID" column to appear in the Athlete menu.

- **Show Preferred Name** - check this item for a "Preferred" (Preferred Name) column to appear in the Athlete menu.

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NOTE: Unchecking any item will remove the column related to the item.

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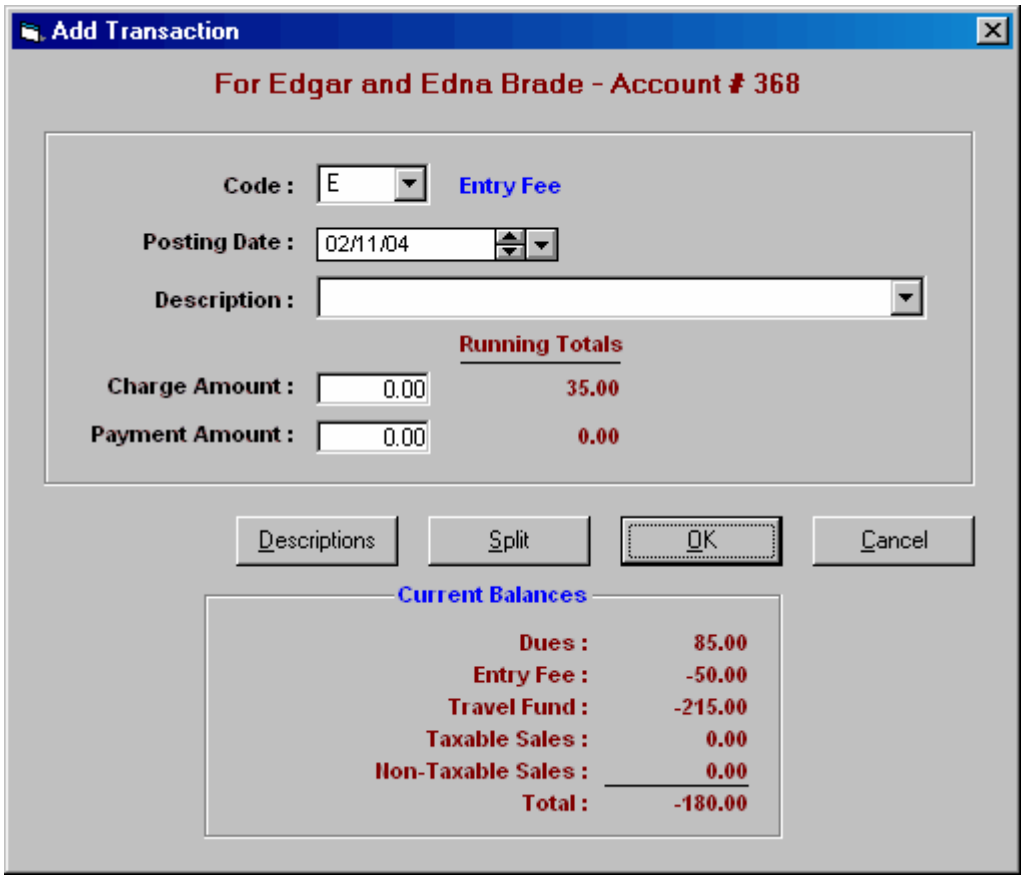
Transactions Menu

The Transaction section is where you post charges and credits to accounts so that you can bill them for balances due. This Section includes information on how to Enter and Edit **Transactions**; how to view the **History** file; how to adjust **Previous Balances**; how to print the **Daily Report**; and how to use the **SpeedAdd** feature.

Transactions

The Transaction section is where you post charges and credits to accounts so that you can bill them for balances due. This section includes information on how to Enter and Edit **Transactions**; how to view the **History** file; how to adjust **Previous Balances**; how to print the **Daily Report**; and how to use the **SpeedAdd** feature.

From the Main Menu, click on **Accounts**. There will be two grids shown with an account list in the top grid and an athlete list in the bottom grid. Click **Transactions** at the top to have the athlete list replaced by the transaction list**.** To enter a new transaction, **first** select the desired Account from the top list of accounts. Then click the **Add** icon just above the list of transactions in the lower grid. To edit an existing transaction, click the **Edit** icon or double click the transaction.



NOTE: As you add Transactions, the Account Balances at the bottom of the Add screen are updated. In addition, Running Totals are displayed when you are adding multiple transactions to the same account. In the above example, a 35.00 charge has already been added.

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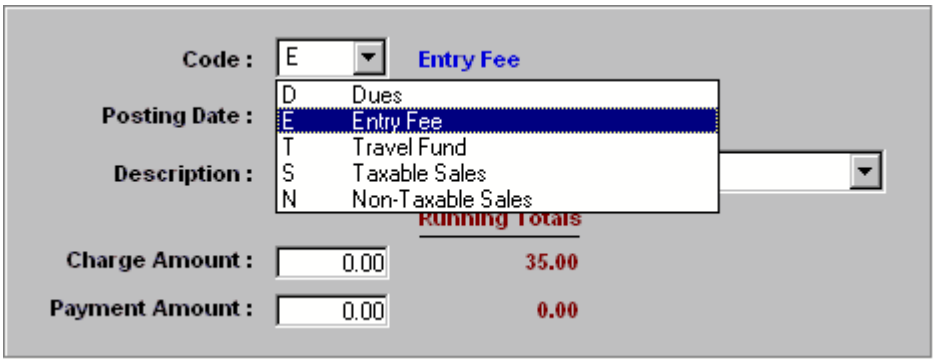
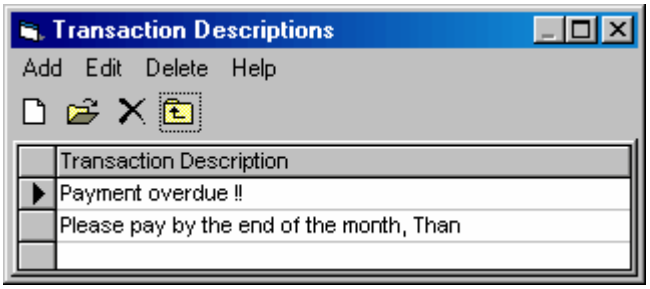
Select your Code from the combo box. This is the invoice category.



Be certain that the posting date is correct. You must add a description. You can type in a description or click the down arrow at the end of the description text box and select from your set of **Memorized Descriptions**. If you select from the memorized descriptions, you can still edit that description after you select it. To add to the memorized list, click the **Descriptions button** in the Add Transactions window and that takes you to the memorized descriptions list. From this list, as shown below, you can add new memorized descriptions and edit or delete existing ones.



After entering the transaction description, enter the **Charge Amount** (debit) and/or the **Payment Amount** (credit). You can enter both a charge and a payment on the same line and the amounts can be negative. For example, suppose you had charged an account $70 for the coming month's dues and you received a $60 dues check and your policy was that if it was received on time, you offered a $10 discount. You could enter 60.00 for payment and -10.00 for charges to indicate that you were "reversing the dues charge by $10."

If you need more category detail on what a charge or payment is applied to, you can use **Invoice Subcategories** to provide that detail for your own reports. These invoice subcategories do not show on invoices. Click on the **Split** button in the Add Transactions window.

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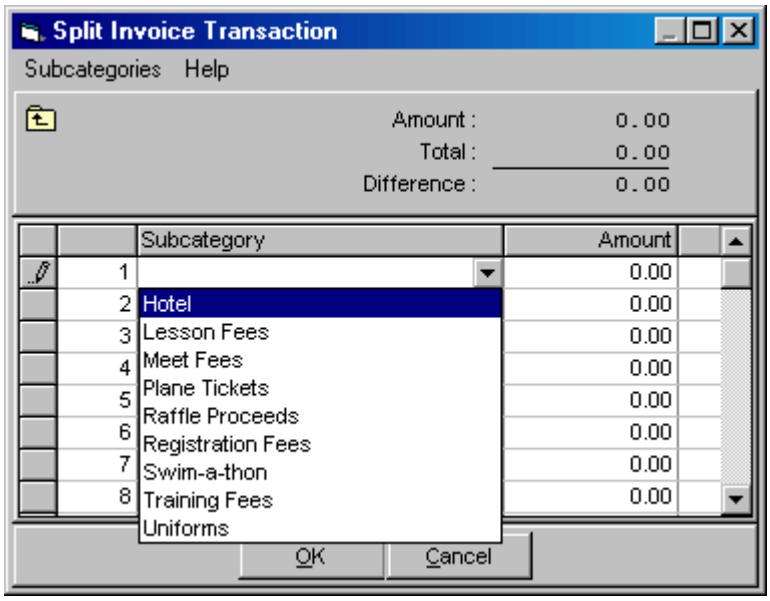
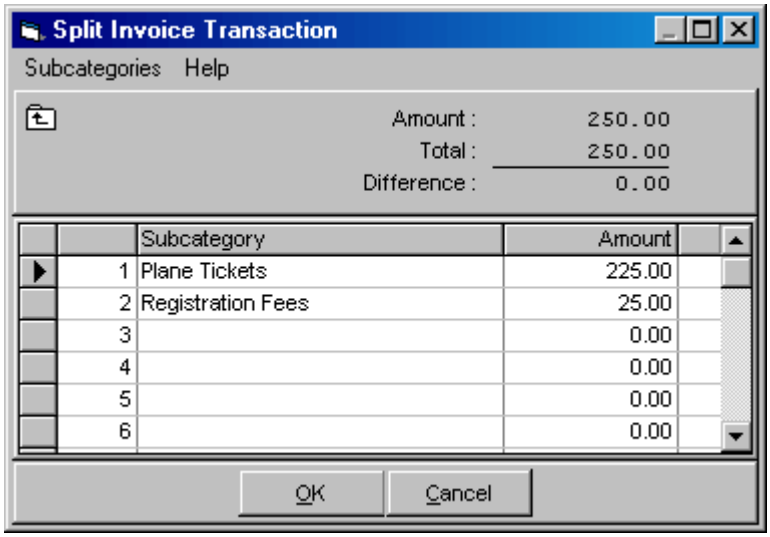


To add invoice subcategories, click directly into the Subcategory cell and then you can select from the subcategory list previously established in the Set-up Menu. As you enter the Splits, the difference between the total of the splits and the transaction amount is displayed. Normally you would want the difference to be zero.



After a transaction is added or edited, you return to the Account/Transaction screen. The Transaction screen below shows a sample set of transactions. Note that the account **Balances** in each of the five Invoice Categories is displayed above the Transactions. These balances are updated whenever a transaction is added or edited. You can sort the transaction list by clicking any of the column headers (except category). Initially the sort is by Invoice Code.

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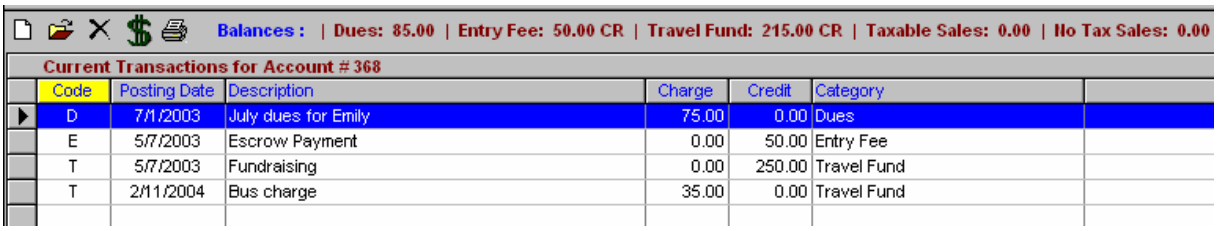


Code	Posting Date	Description	Charge	Credit	Category
D	7/1/2003	July dues for Emily	75.00	0.00	Dues
E	5/7/2003	Escrow Payment	0.00	50.00	Entry Fee
T	5/7/2003	Fundraising	0.00	250.00	Travel Fund
T	2/11/2004	Bus charge	35.00	0.00	Travel Fund

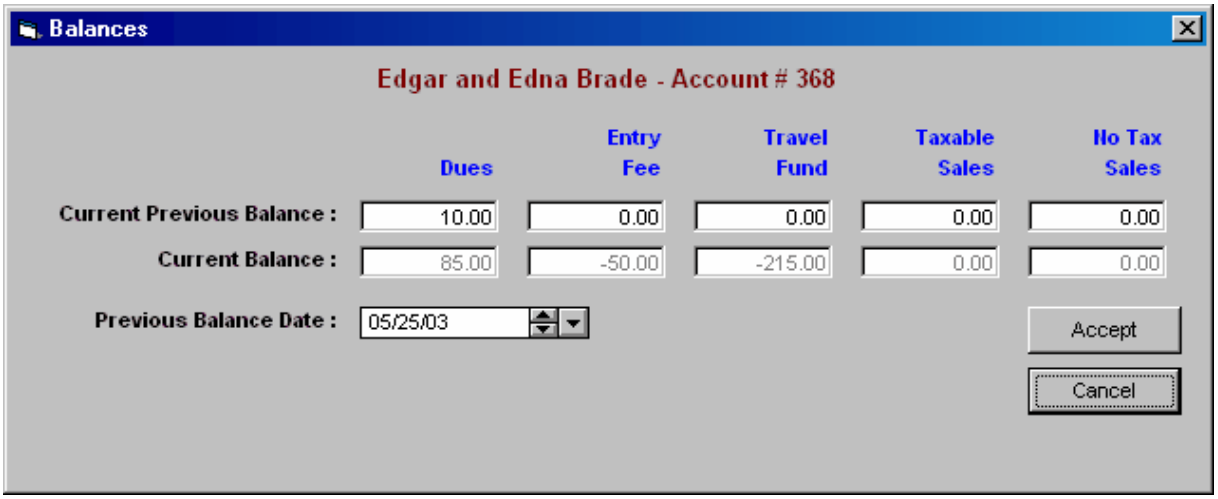
Print an Invoice

To print or view an invoice for the current account, just click on the Print Icon as shown above. This is a quick way to create and print an invoice for just one account. Whether a message prints with the invoice depends on the setting in the Invoices Menu. To change the message, you click **Invoices** at the top of the Accounts menu bar. From there you can select from your various sets of saved invoice messages. You can also select whether you want athlete information listed at the top of the invoice or not. And you can choose the sort order for the transactions on the invoice to be either

- by invoice code and by posting date within an invoice code
  or
- by posting date.

Previous Balances

In addition to the usual Add, Edit, Delete, and Print icons, there is a **dollar sign icon** that appears whenever transactions or history transactions are displayed in the Accounts screen. Clicking the dollar sign when Transactions are shown will display a menu with Current Previous Balances as well as the Current Balances in each of the five invoice categories. Normally, the only time you would adjust a previous current balance is right after you have entered a new account into the database.



In order to transfer account balances from your previous accounting system to **SportsBM**, you will need to enter the account balances and the effective date of those account balances for each new account. The current balances of the old system thus become the current and previous balances of the new **SportsBM** system. If there is a credit balance for any category, then place **a minus sign** in front of the amount.

History

After you have printed invoices and mailed them, you perform a **Close-Out** of current transactions to move them to the History Transaction file. Click Here for information on how to close-out invoices. If you do not close-out the transactions, the next invoice will contain the same transactions from the previous invoice plus any new transactions. This will be confusing to your members and so it is

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recommended that a close-out be performed after each invoice mailing.

To view the History files, from the Main Menu click on **Accounts** and then click **History** at the top of the menu bar. Select an account and that account's list of history transactions will be displayed. You cannot edit a History transaction. If you find there is an error in a History transaction, such as Mary being charged $60 for dues, then enter a new transaction to Transactions with something like "Reverse July dues for Mary" and put in -60.00 in the charges column. If you were to edit a History transaction, there would be no way for the account person to know you changed it.

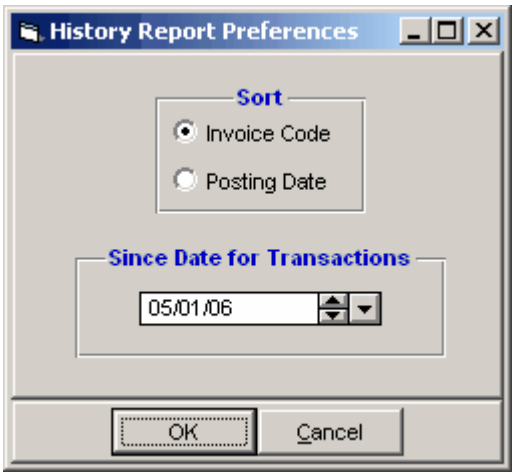
Balances : | Dues: 1.00 CR | Entry Fee: 3.01 CR | Travel Fund: 2.00 CR | Taxable Sales: 12.00 CR | No Tax Sales: 2.12 CR

History Transactions for Account # 2

Code	Posting Date	Description	Charge	Credit	Category
E	11/21/2003	entry fees	0.00	22.00	
E	12/3/2003	Paducah Swimfest 04 for: Ava	40.50	0.00	
E	12/3/2003	Pentathlon Sprint 03 for: Ava	26.00	0.00	
E	12/16/2003	entry fees	0.00	66.50	
E	2/13/2004	Surcharge for Great Times for Ava	5.00	0.00	
E	3/18/2004	entry fee	0.00	1.00	
E	4/7/2004	Small Club Championships entry fees for: Ava	17.00	0.00	
E	4/16/2004	entry fee	0.00	5.00	
E	5/3/2004	Pentathlon surcharge for Ava	5.00	0.00	Entry Fee
E	7/16/2004	entry fee	0.00	21.00	Entry Fee
E	8/10/2004	Long Course Championship for:	29.50	0.00	Entry Fee
E	10/18/2004	Entry fee	0.00	29.50	Entry Fee
E	10/28/2004	Carbondale 500 for Ava	21.00	0.00	Entry Fee
E	11/22/2004	entry fee	0.00	21.00	Entry Fee
E	12/20/2004	PADUCAH SWIMFEST 05 for Ava	36.50	0.00	Entry Fee
E	1/19/2005	entry fee	0.00	36.50	Entry Fee
E	11/1/2005	Meet Entries for Carbondale 500 for Ava	21.00	0.00	Entry Fee
E	11/17/2005	Meet Entries	0.00	21.00	Entry Fee

Print History

To print or view a list of History transactions for the current account, just click on the Print Icon as shown in the previous screen. This is a quick way to review the transaction history for just one account. This summary will sort by invoice category and provide sub totals for charges and for payments for each invoice category. Plus there will be a grand total. If there was a Day 1 balance for any invoice category, that balance will be included. The report below is sorted by Category and then by Posting Date. To sort by Posting Date or to limit the transactions list to those Since a certain Date, click the Heart icon shown above and you get the History Preferences as follows:



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History Transactions

Account: # 328

Myron & Farrah Farolona
5300 Stockton Crt.
Winston, VA 22193
Facility: Andrews Facility
Active Status: Inactive

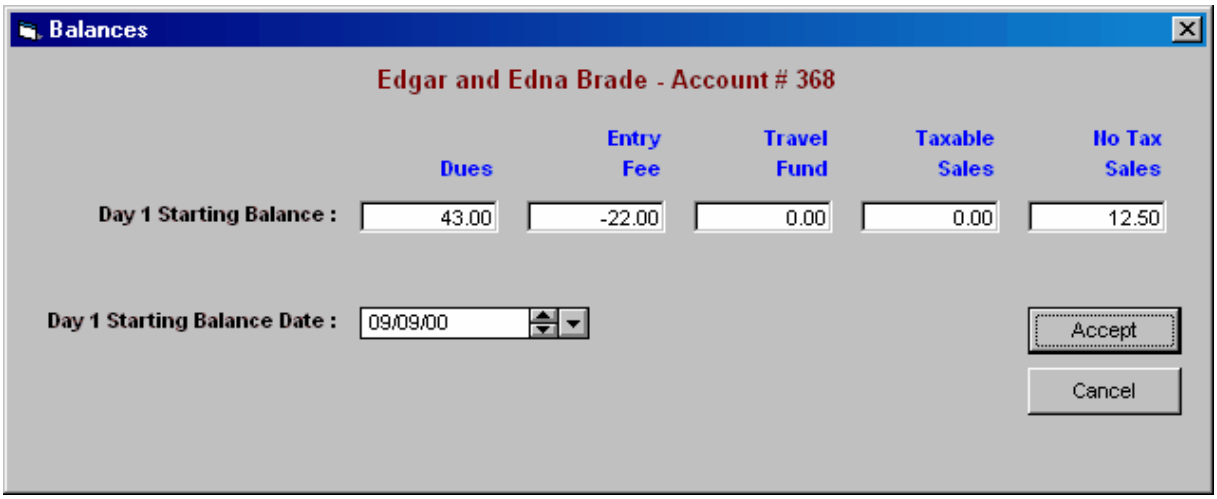
Home: 626-448-2224
Office: 200-764-1873
Last Invoice: 9/14/2001

D - Dues

Posting Date	Description	Charges	Credits
2/19/2000	dues for Ali and Tayeeb 2/15 - 3/15	100.00	100.00
3/17/2000	Ali 3/15 - 4/15	50.00	
3/17/2000	Tayeeb 3/15-4/15	50.00	
3/26/2000	ck 2337		100.00
4/24/2000	ck 2348 dues for boys 4/15 - 5/15	100.00	100.00
5/11/2000	Ali	50.00	
5/22/2000	ck 2367		50.00
10/18/2000	Sadiyah 12 sessions for minnows	40.00	40.00
10/18/2000	part annual dues bal next payment $184.50	140.00	140.00
10/18/2000	final paymt	184.50	
11/16/2000	ck2469		184.50
2/19/2001	Sadiyah	20.00	
3/1/2001	CASH, Sadiyah to 4/9		20.00

Day 1 Starting Balance

There is a **dollar sign icon** that appears whenever History transactions are displayed in the Accounts screen. Clicking the dollar sign will display a menu with the **Day 1 Starting Balances** in each of the five invoice categories. Normally, the only time you would adjust a Day 1 starting balance would be if you forgot to enter this balance when first adding the account to the database.



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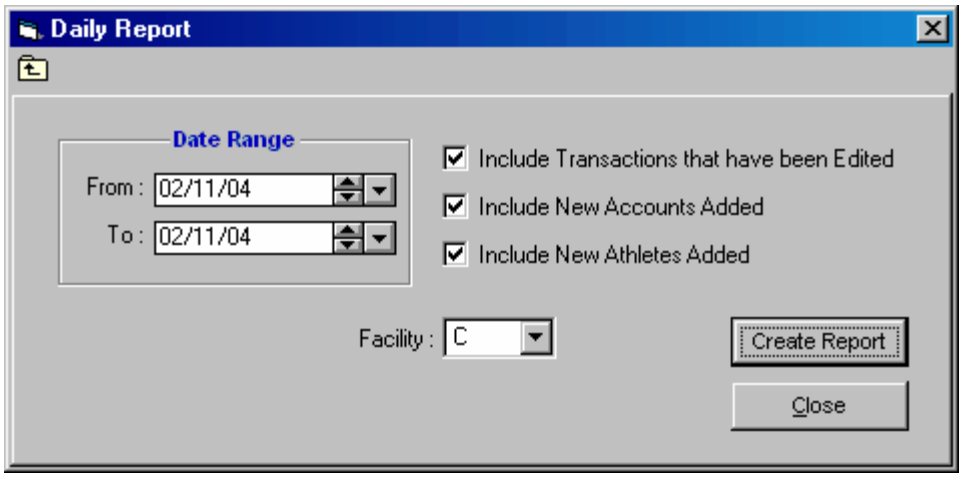
Daily Report

More than likely, the most useful report that **SportsBM** has to offer is the Daily Report. It summarizes the day's activities. To access the Daily Report from the Main Menu, click on **Accounts** and then click on **Daily** at the top of the menu bar.

- Whoever is responsible for the bank deposits and the computer data entry will rely on the Daily Report to check the day's work and to verify the accuracy of the bank deposit.
- Whoever is responsible for the books for recording income for the tax return will rely on the Daily Report for the breakdown of the income into the five account categories.
- Whoever owns the organization will rely on the Daily Report to be kept abreast of the organization's progress and to check the accuracy of the data that is going into the computer.

First, click on **Daily** at the top of the Accounts screen, and the following box will appear.



Choose the Date Range by either typing in the numbers or using the drop down calendars. Normally the date range would be for one day. You have choice to include Edited Transactions, New Accounts, and/or New Athletes.

The Daily Report has Five Parts

1. The first part is an alphabetical account list of all charges and credits entered for the day. It includes a grand total for the charges and a grand total for the credits.

2. The second part of the daily report is a breakdown of the total amount charged and credited to each of the five account categories. In addition, the total balance due for each category from all facilities is listed along with the escrow amounts owed to accounts for each of the five categories. **Note**: If you have the Checkbook Option, click on Auto Deposit for details on how to automatically post the deposit amount to the Checkbook Register.

3. The third part of the daily report includes a listing of corrections that were made to the transactions previously entered.

4. The fourth part is a list of all new accounts added during the date range selected.

5. The fifth part is a list of all new athletes added during the date range selected.

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Daily Report - 6/5/2003 to 6/5/2003

Date Printed - 6/5/2003 3:32:20 PM

Acct#	Name	Date	Category	Description	Charges	Credits
458	Albert, Norman & Laura	5/5/2003	Travel Fund	Fundraiser	0.00	388.00
458	Albert, Norman & Laura	6/1/2003	Taxable Sales	Girls suit and goggles	72.75	0.00
458	Albert, Norman & Laura	6/5/2003	Entry Fee	Summer Long Course Splash	28.00	0.00
458	Albert, Norman & Laura	6/5/2003	Travel Fund	Las Vegas Trip	550.00	0.00
458	Albert, Norman & Laura	6/15/2003	No Tax Sales	Spaghetti dinner	15.00	0.00
					665.75	388.00

Charges	Credits	Category	Balance Due	Escrow
0.00	0.00	Dues	1694.65	-160.75
28.00	0.00	Entry Fee	658.00	-45.00
550.00	388.00	Travel Fund	557.00	-420.00
72.75	0.00	Taxable Sales	392.70	-1.88
15.00	0.00	No Tax Sales	244.00	0.00
665.75	388.00		3546.55	-647.63

Modified Transactions

	Acct#	Name	Date		Description	Charges	Credits	Edit Date
Old	412	Anderson, Doug & Lisa	5/2/2003	T	swim-a-thon	0.00	120.00	6/5/2003
New	412	Anderson, Doug & Lisa	5/2/2003	T	swim-a-thon	0.00	120.00	6/5/2003
Old	458	Albert, Norman & Laura	6/15/2003	N	Spaghetti dinner	1500.00	0.00	6/5/2003
New	458	Albert, Norman & Laura	6/15/2003	N	Spaghetti dinner	15.00	0.00	6/5/2003

> No accounts added during the period selected.

Reverse Charges

When entering transactions, there will be special situations in which it will not be obvious what to do. This situation could arise when an account has been overcharged or charged in error and you need to "reverse charges" to rectify the error. The obvious way to handle this is to go to Accounts / Transactions and double click the entry and edit the charges. But you cannot edit the transaction if the transaction has already been "closed out". Now you must enter a new transaction that states "reverse charges" or "credit for overcharge" and enter an amount in the credits column. But the bank deposit will not balance with the Daily Report because there was no "check" for the credit. **The way around this is to post the "credit" in the charges column with a minus sign in front of it**. Then it really does meet the definition of "reverse charges" and will not affect the bank deposit calculation on the Daily Report.

Late Payments

If you charge a late fee for overdue charges, add the late fee to the monthly dues charge beforehand, and subtract the late fee if the payment is on time by using the Reverse Charges method.

Speed Add

This routine is designed primarily for posting entry fee charges or monthly dues charges and is used effectively in conjunction with the Athlete Posting Reports available from the Reports Menu.

Write down the amounts on the Athlete Posting Reports and then use those sheets to quickly enter your **SpeedAdd** transactions.

SpeedAdding Similar Transactions

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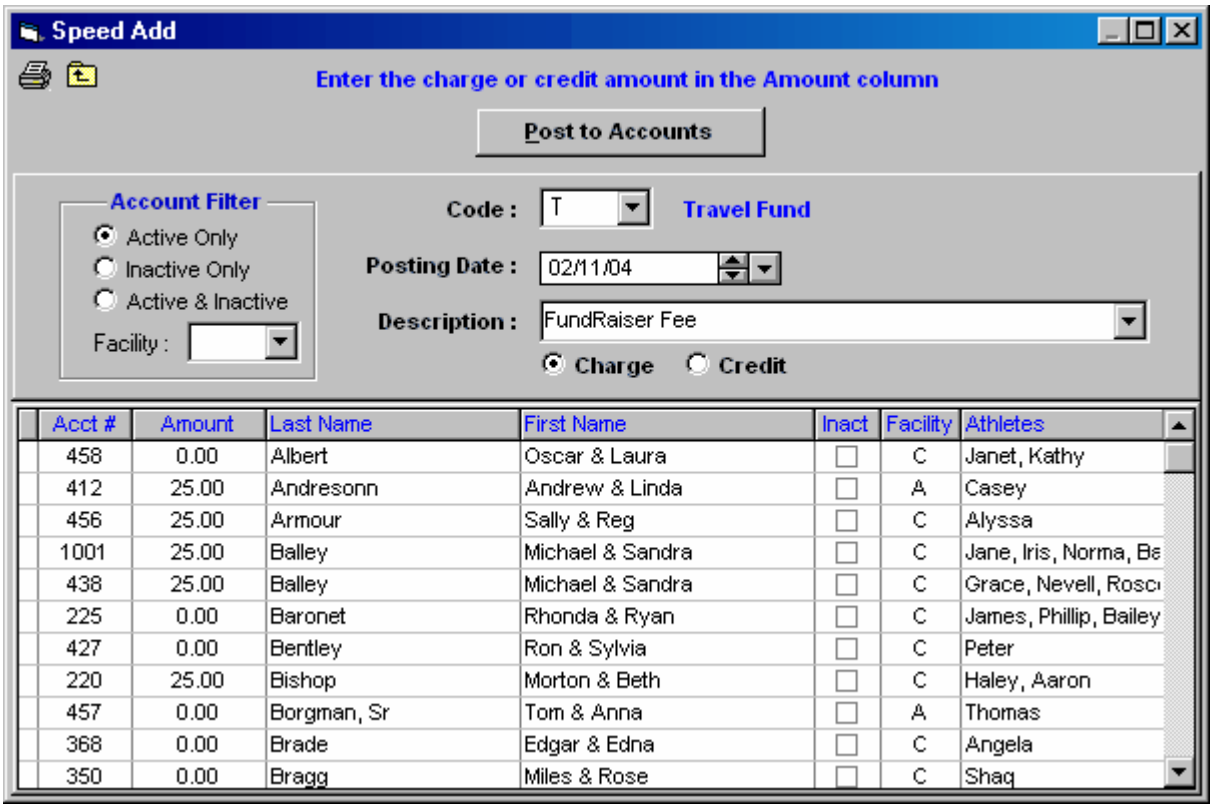
To create a **SpeedAdd** Transaction, from the Main Menu, click on **Accounts / SpeedAdd**.



1. Select a **Code** by using the combo box.
2. Select a **Date** by using the calendar menu.
3. Type in a description of the transaction (ex: Memorial Day Meet Fees)
4. Select either **Charge** or **Credit**.
5. Use the account filter to reduce the account list to one facility and/or active only, inactive only, or both active and inactive.

Now, for each account to be charged, enter the amount in the Amount column. Skip over the accounts that do not need to be charged. For example, when posting entry fee charges for a particular meet, the date, the name of the meet, and the account category remain the same for all accounts entered in the meet. The speed adding routine allows you to enter just the amount of the entry fee charge in the column next to the correct account. **SportsBM** will then post the date, the transaction description, and the category for you. The posting of monthly dues could also be done this way. For example, assuming the description in 'May dues", the date is "07/01/03", and the category is "D", you would merely post the amount for each account. At any time, you can click the printer icon to see what the entire posting will look like. After you have entered the charge or credit amounts, click the button **Post to Accounts**. A screen will appear with the following message: "Begin posting? You can create a report before posting by clicking the printer icon." This message reminds you to create a report in case you have not done so.

After the program has completed posting the amounts, a message will pop up to tell you how many transactions were posted. Click OK, and you will return to the Accounts Menu. All **SpeedAdd** transactions can be printed in the Daily Report or in the Transactions Report.

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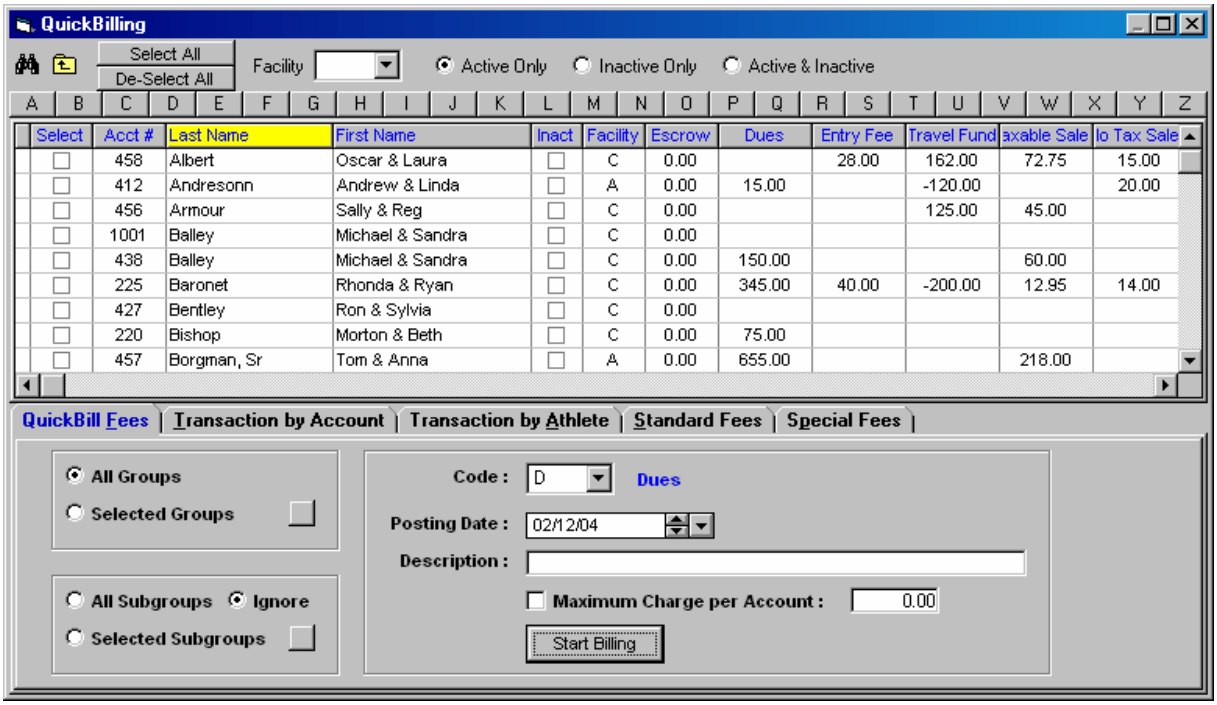
QuickBilling

This section describes how to post charges or credits to many accounts very quickly. There are three parts to QuickBilling:

- **QuickBill Fees** - This feature can charge every athlete their monthly dues fee in a matter of seconds.
- **Transaction by Account** - This feature can charge or credit a group of selected accounts the same fee simultaneously.
- **Transaction by Athlete** - This feature allows you to select a group of athletes and charge or credit their parent account the same fee simultaneously.

NOTE: QuickBilling is an **additional option that may be purchased** in addition to the basic **SportsBM** program. To see if you have this option, from the Main Menu of **SportsBM**, click **Help / About**. Click Here for information on ordering any additional options.

To display the QuickBilling Menu, from the Main Menu, click on **Accounts / QuickBilling**.



QuickBill Fees Concept

It is very likely that more than half of your organization pays the same amount every month for training fees (sometimes called "dues" or "tuition"). It is also probable that your organization has some sort of annual fee like "annual registration" or "annual contribution to the travel fund". The QuickBilling option is designed to minimize the effort to handle these repetitive charges.

QuickBill Fees is one of the features of QuickBilling and it is designed to charge each athlete according to a one to four character "Pay Code" which is assigned to the athlete. When you first add an athlete, the "Pay Code" defaults to **STD**, the standard charge code. This **STD** pay code tells **SportsBM** to refer to the fees assigned to an athlete's group / subgroup. Each group and/or group / subgroup combination may have a separate fee for the first, second, third, fourth, and fifth athlete in a given account. To assign the fees for each group / subgroup combination, refer to the **Standard Fees**

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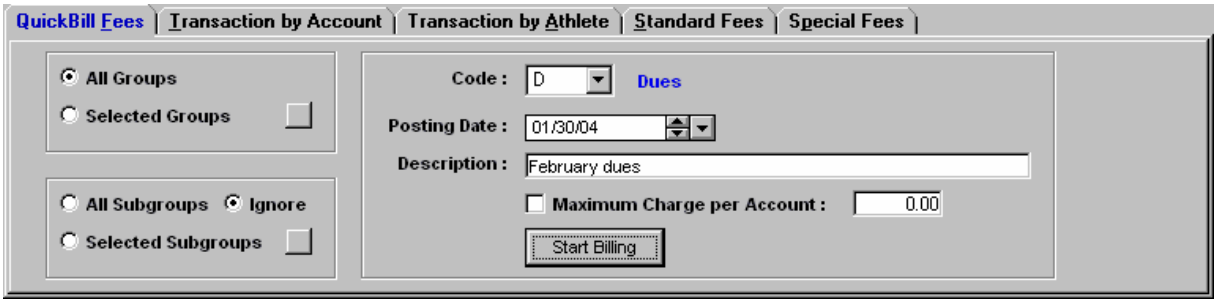
and **Special Fees** sections below. If an athlete is NOT to be charged the standard fee for the group / subgroup he or she is placed in, then use the Special Fee Codes. You can create any number of 1 to 4 character Special Fee Codes. For example, you could create one named HALF and have that mean the athlete gets a one half dues rate. When **QuickBill Fees** is run, it looks at all athletes in a given account and gathers what the first athlete rate is for each of the athletes in the account. The most expensive fee is then charged to the athlete with the highest first athlete rate. Then remaining athletes are scanned for their second athlete rate and the one with the highest second athlete rate is charged. This process continues through the fifth athlete within an account and if there are more than five athletes in one account, the remainder are all charged the fifth athlete rate. If the policy is for the fourth athlete and beyond to be free, then the charge codes fees for the fourth and fifth athlete should be zero.

QuickBill Fees

First, select the accounts from the top. You can filter by **Facility** or **Account Activity**. To select all accounts, click on **Select All** or individually select accounts by checking in the **Select** column. Use the **Groups** and **Subgroups** filters at the bottom of the screen to further filter. If you wish to use **Selected Groups** or **Selected Subgroups**, click the appropriate radio button and then click on the box to the right of your choice. Your groups or subgroups will appear in a pop up box, and you can select your choices from that box and click OK.

From the bottom of the QuickBilling screen, click on the **QuickBill Fees** tab to charge monthly fees according to the Standard Group Fees and the Special Charge Code Fees assigned to each **active** athlete.



When you run **QuickBill Fees**, you simply enter the Code, such as D for "Dues", a description of the charge, such as "February dues", and the date for posting, which can be different than the current date. Maybe you want to have the posting date be the first of the month and you want to complete this task on the 28th. If you wish to put a limit on the maximum fee that can be charged to a single account, click the **Maximum Charge per Account** check box and type in the maximum amount. For example, you may have a cap of $150 for a given account and this account might have 4 athletes that total $200 in dues charges. The check box would revise the charge to $150 and the Posting List would indicate that the $200 was adjusted to $50. You have the option to select all groups or a selected set of groups for billing. If your fees are based simply on groups and not on groups in combination with subgroups, then use the **Ignore** button for subgroups. If you use selected groups, a screen such as the one below will appear for you to select the particular groups. Just check the **Sel** check box for those groups to include. Selected subgroups work the same way. *Note that **inactive** athletes are never included in the QuickBilling routines.*

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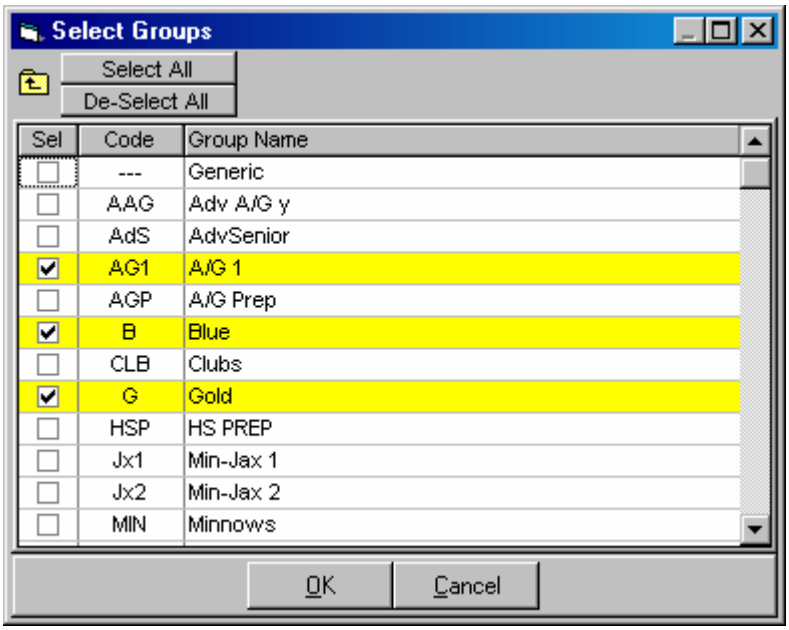
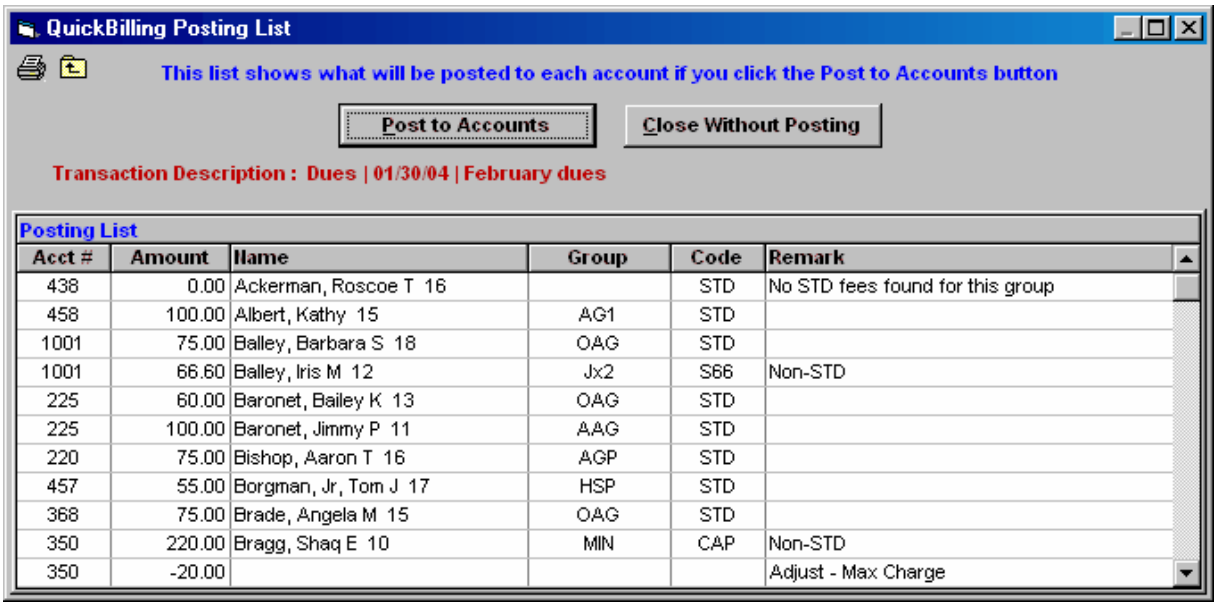


After you have entered your choices, click the **Start Billing** button and a Posting List will appear such as the one below.



Acct #	Amount	Name	Group	Code	Remark
438	0.00	Ackerman, Roscoe T 16		STD	No STD fees found for this group
458	100.00	Albert, Kathy 15	AG1	STD	
1001	75.00	Balley, Barbara S 18	OAG	STD	
1001	66.60	Balley, Iris M 12	Jx2	S66	Non-STD
225	60.00	Baronet, Bailey K 13	OAG	STD	
225	100.00	Baronet, Jimmy P 11	AAG	STD	
220	75.00	Bishop, Aaron T 16	AGP	STD	
457	55.00	Borgman, Jr, Tom J 17	HSP	STD	
368	75.00	Brade, Angela M 15	OAG	STD	
350	220.00	Bragg, Shaq E 10	MIN	CAP	Non-STD
350	-20.00				Adjust - Max Charge

From the **QuickBilling Posting List**, you can click the printer icon to create a report of the list. If you see anything that is incorrect, click the **Close Without Posting** button, make your corrections to the pay codes or activity of athletes and then perform the **QuickBill Fees** function again. Notice in the example above the adjustment to account #350 which exceeded the maximum charge. The actual charge to the account will be the $200 and will not show the $20 reduction.

Once you are satisfied that the posting list is correct, click the **Post To Accounts** button and all accounts on the list will be charged in a matter of seconds. To verify the charges, you can select an account in the Accounts Menu and look at the transactions or create some invoices. In addition, you could create a Daily report to see a full list or go to **Reports / Account Financials / Transaction**

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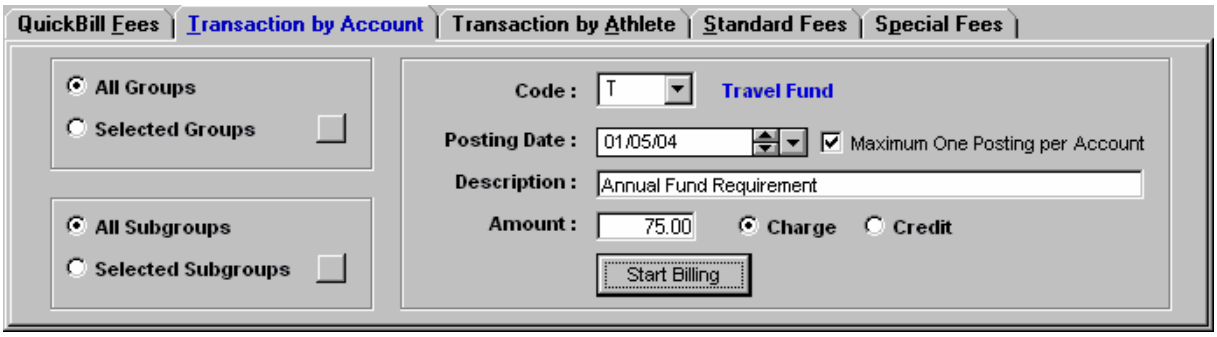
Summaries.

Transactions by Account

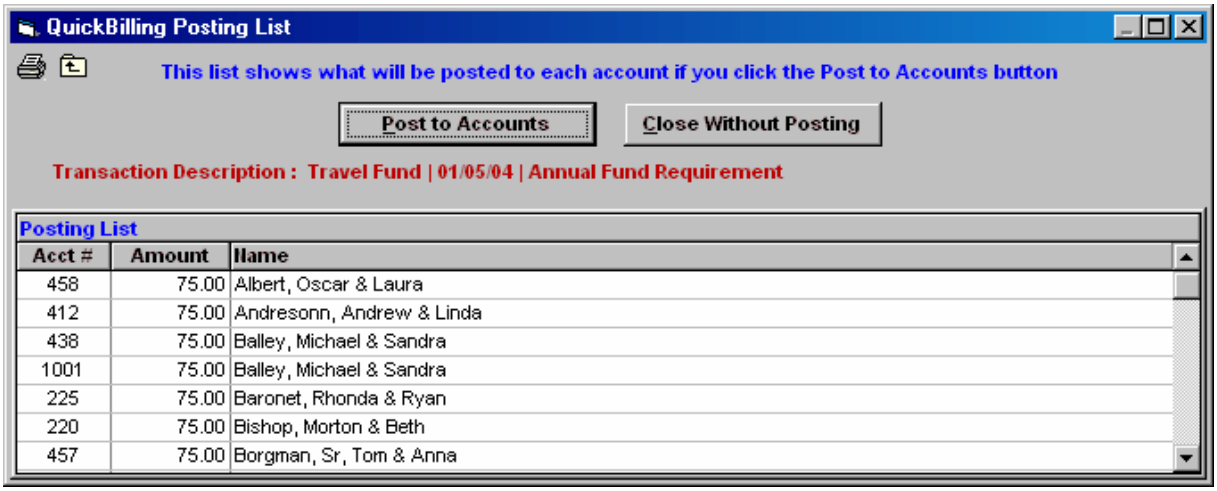
From the bottom of the QuickBilling screen, click on the **Transaction by Account** tab to quickly and easily make group charges or credits to specific Accounts.



Enter the Code, such as T for "Travel Fund", a description of the charge or credit, such as "Annual Fund Requirement", and the date for posting, which can be different than the current date. Enter the amount and whether it is a charge or credit. Enter your group and subgroup choices, if any. **Note that inactive athletes are never included in the QuickBilling routines**.

Since the charges are based on athletes, there might be 3 active athletes in an account and if so, in the example above, an account with three athletes would be charged $225. However, if the **Maximum One Posting per Account** check box is checked as in the example above, all accounts selected will be charged $75 regardless of how many athletes are within an account.

After you have entered your choices, click the Start Billing button and a Posting List will appear such as the one below.



From the **QuickBilling Posting List**, you can click the printer icon to create a report of the list. If you see anything that is incorrect, click the **Close Without Posting** button, make your corrections and then create the Posting List again. Once you are satisfied that the posting list is correct, click the **Post To Accounts** button and all accounts on the list will be charged. To verify the charges, you can select an account in the Accounts Menu and look at the transactions or create some invoices. In addition, you

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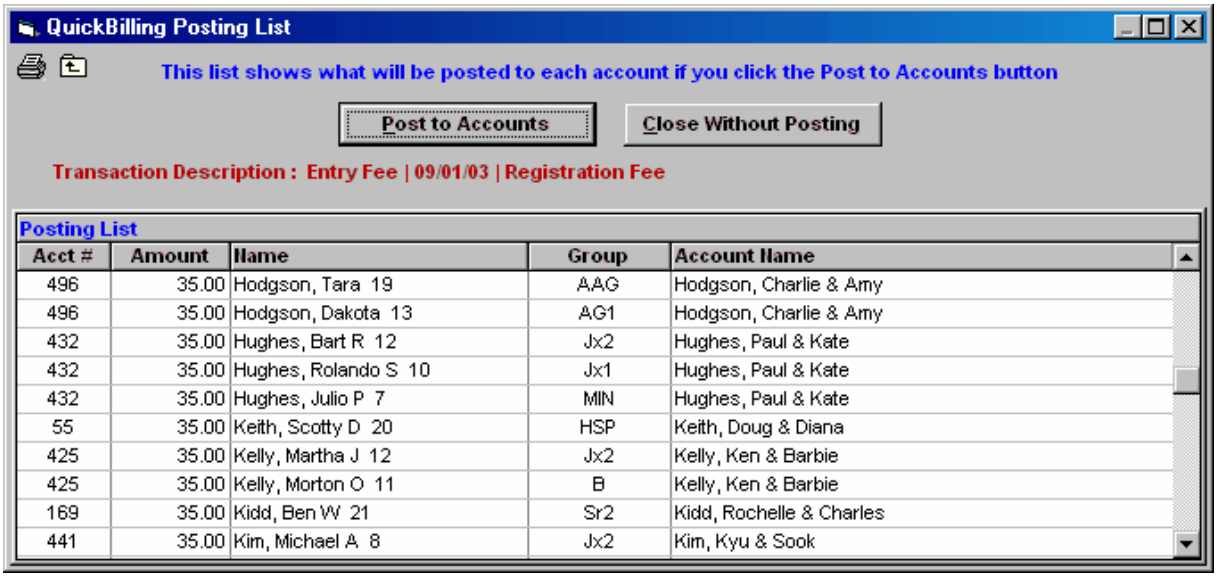
could create a Daily report to see a full list or go to **Reports / Account Financials / Transaction Summaries**.

Transactions by Athlete

From the bottom of the QuickBilling screen, click on the **Transaction by Athlete** tab to quickly and easily charge or credit Accounts based on groups of **active** athletes.

Enter the Code, such as E for "Entry Fee", a description of the charge or credit, such as "Registration Fee", and the date for posting, which can be different than the current date. Enter the amount and whether it is a charge or credit. Enter your group and subgroup choices, if any. **Note that inactive athletes are never included in the QuickBilling routines.**

After you have entered your choices, click the **Start Billing** button and a Posting List will appear such as the one below.



Acct #	Amount	Name	Group	Account Name
496	35.00	Hodgson, Tara 19	AAG	Hodgson, Charlie & Amy
496	35.00	Hodgson, Dakota 13	AG1	Hodgson, Charlie & Amy
432	35.00	Hughes, Bart R 12	Jx2	Hughes, Paul & Kate
432	35.00	Hughes, Rolando S 10	Jx1	Hughes, Paul & Kate
432	35.00	Hughes, Julio P 7	MIN	Hughes, Paul & Kate
55	35.00	Keith, Scotty D 20	HSP	Keith, Doug & Diana
425	35.00	Kelly, Martha J 12	Jx2	Kelly, Ken & Barbie
425	35.00	Kelly, Morton O 11	B	Kelly, Ken & Barbie
169	35.00	Kidd, Ben W 21	Sr2	Kidd, Rochelle & Charles
441	35.00	Kim, Michael A 8	Jx2	Kim, Kyu & Sook

From the **QuickBilling Posting List**, you can click the printer icon to create a report of the list. If you see anything that is incorrect, click the **Close Without Posting** button, make your corrections and then create the Posting List again. Once you are satisfied that the posting list is correct, click the **Post To Accounts** button and all accounts on the list will be charged. To verify the charges, you can select an account in the Accounts Menu and look at the transactions or create some invoices. In addition, you

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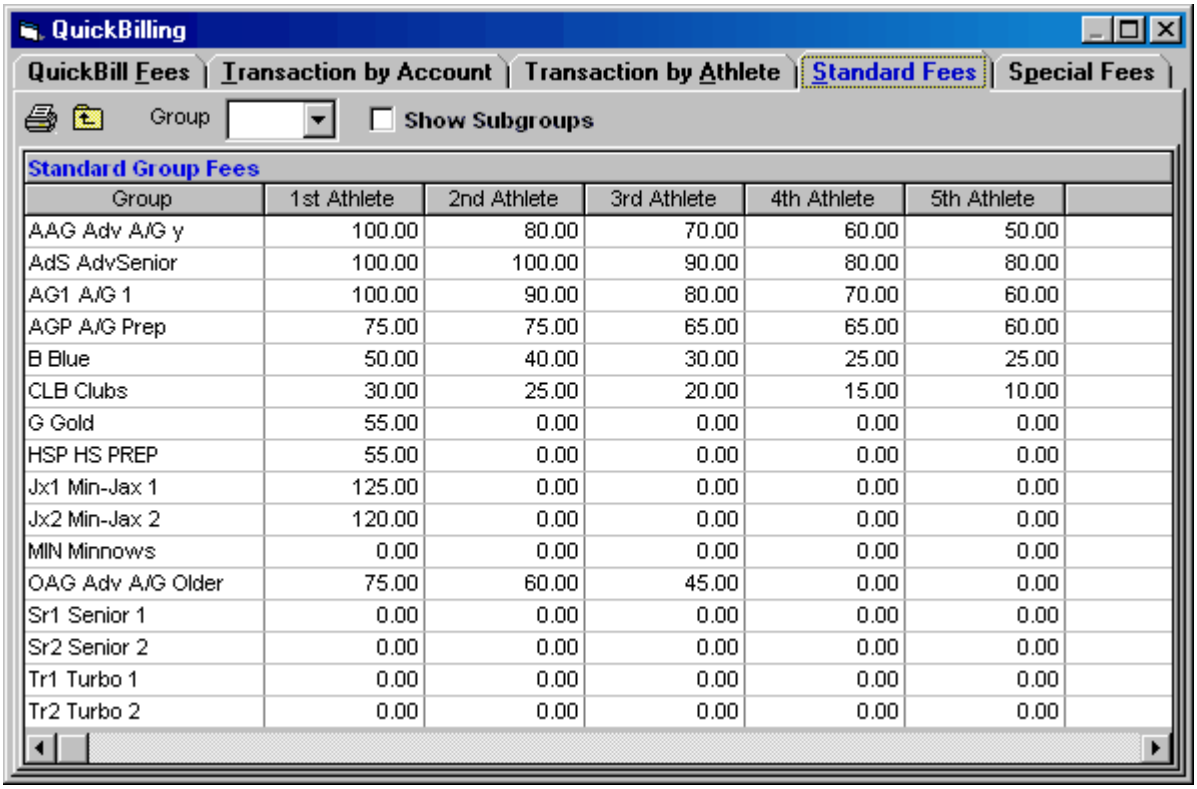
could create a Daily report to see a full list or go to **Reports / Account Financials / Transaction Summaries**.

Standard Fees

Each athlete has a **Pay Code** which is a 1 to 4 character code that is used by the **QuickBill Fees** routine described earlier. Every athlete starts out with a **Pay Code** of **STD** which means use the group and subgroup fee structure to know what the athlete should be charged for training fees. Each group and subgroup combination may have a separate fee for the first, second, third, fourth, and fifth member in a given Account. To enter/edit/view the **Standard Group Fees** according to groups and subgroups (numerous possibilities), from the Main Menu, click on **Accounts / QuickBilling**, and at the bottom of the page, click on the tab **Standard Fees.** If your billing system is based strictly on groups and does not use subgroups, then leave the **Show Subgroups** check box unchecked as shown below. To edit the fee amounts, simply edit any grid cell directly.



Group	1st Athlete	2nd Athlete	3rd Athlete	4th Athlete	5th Athlete
AAG Adv A/G y	100.00	80.00	70.00	60.00	50.00
AdS AdvSenior	100.00	100.00	90.00	80.00	80.00
AG1 A/G 1	100.00	90.00	80.00	70.00	60.00
AGP A/G Prep	75.00	75.00	65.00	65.00	60.00
B Blue	50.00	40.00	30.00	25.00	25.00
CLB Clubs	30.00	25.00	20.00	15.00	10.00
G Gold	55.00	0.00	0.00	0.00	0.00
HSP HS PREP	55.00	0.00	0.00	0.00	0.00
Jx1 Min-Jax 1	125.00	0.00	0.00	0.00	0.00
Jx2 Min-Jax 2	120.00	0.00	0.00	0.00	0.00
MIN Minnows	0.00	0.00	0.00	0.00	0.00
OAG Adv A/G Older	75.00	60.00	45.00	0.00	0.00
Sr1 Senior 1	0.00	0.00	0.00	0.00	0.00
Sr2 Senior 2	0.00	0.00	0.00	0.00	0.00
Tr1 Turbo 1	0.00	0.00	0.00	0.00	0.00
Tr2 Turbo 2	0.00	0.00	0.00	0.00	0.00

NOTE: If an athlete is not to be charged the standard fee for the group / subgroup he or she participates in, then change the athlete's Pay Code from **STD** to one of the **Special Fees** described in the next section.

If you have a more complex fee structure using subgroups in addition to groups, then check the **Show Subgroups** check box and your **Standard Group Fees** grid will look something like the one below. Note the huge number of possibilities that give you a great deal of flexibility.

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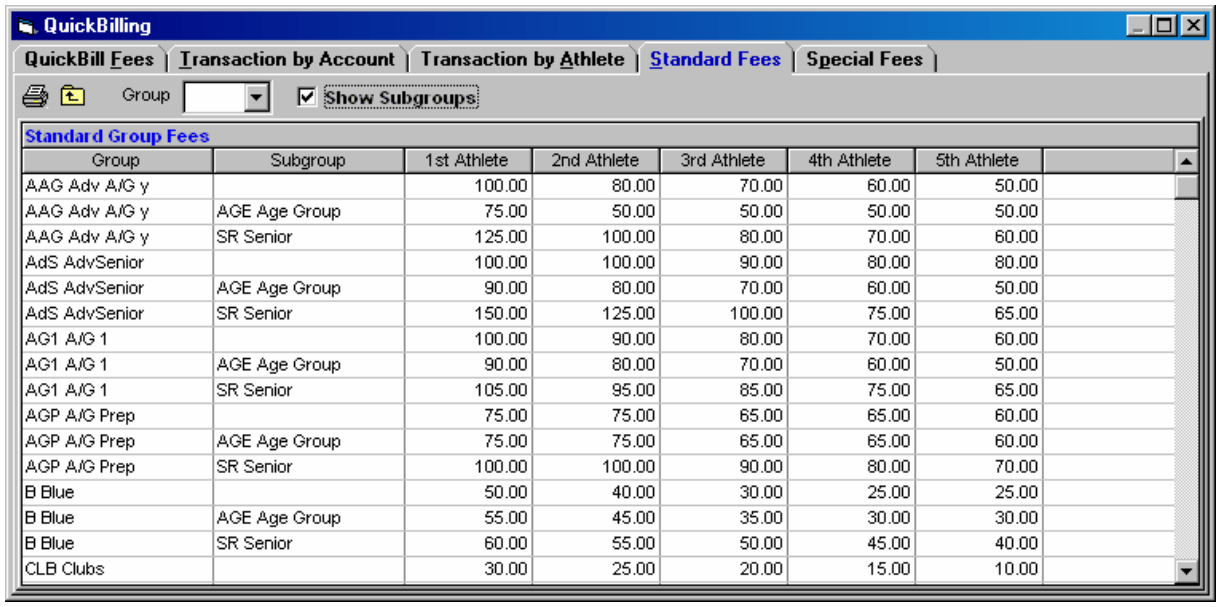
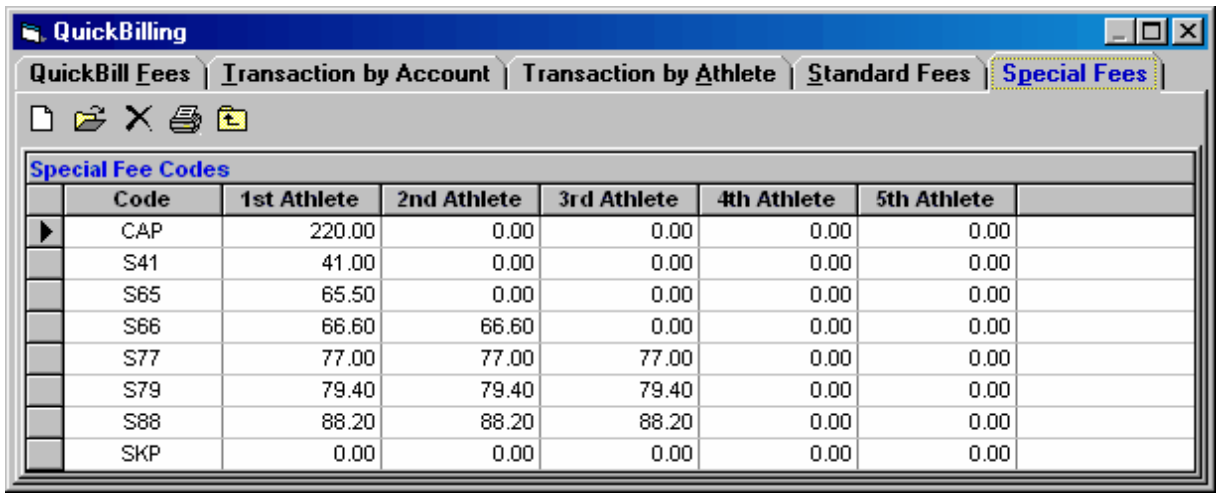


Group	Subgroup	1st Athlete	2nd Athlete	3rd Athlete	4th Athlete	5th Athlete
AAG Adv A/G y		100.00	80.00	70.00	60.00	50.00
AAG Adv A/G y	AGE Age Group	75.00	50.00	50.00	50.00	50.00
AAG Adv A/G y	SR Senior	125.00	100.00	80.00	70.00	60.00
AdS AdvSenior		100.00	100.00	90.00	80.00	80.00
AdS AdvSenior	AGE Age Group	90.00	80.00	70.00	60.00	50.00
AdS AdvSenior	SR Senior	150.00	125.00	100.00	75.00	65.00
AG1 A/G 1		100.00	90.00	80.00	70.00	60.00
AG1 A/G 1	AGE Age Group	90.00	80.00	70.00	60.00	50.00
AG1 A/G 1	SR Senior	105.00	95.00	85.00	75.00	65.00
AGP A/G Prep		75.00	75.00	65.00	65.00	60.00
AGP A/G Prep	AGE Age Group	75.00	75.00	65.00	65.00	60.00
AGP A/G Prep	SR Senior	100.00	100.00	90.00	80.00	70.00
B Blue		50.00	40.00	30.00	25.00	25.00
B Blue	AGE Age Group	55.00	45.00	35.00	30.00	30.00
B Blue	SR Senior	60.00	55.00	50.00	45.00	40.00
CLB Clubs		30.00	25.00	20.00	15.00	10.00

Special Fees

Each athlete has a **Pay Code** which is a 1 to 4 character code that is used by the **QuickBill Fees** routine described earlier. This pay code may need to be customized for certain athletes and so you create **Special Fee Codes** to cover special cases. To enter/edit/view the **Special Fee Codes**, from the Main Menu, click on **Accounts / QuickBilling**, and at the bottom of the page, click on the **Special Fees** tab. To edit the fee amounts, simply edit any grid cell directly. To add a new code, click the **Add** icon.



Code	1st Athlete	2nd Athlete	3rd Athlete	4th Athlete	5th Athlete
CAP	220.00	0.00	0.00	0.00	0.00
S41	41.00	0.00	0.00	0.00	0.00
S65	65.50	0.00	0.00	0.00	0.00
S66	66.60	66.60	0.00	0.00	0.00
S77	77.00	77.00	77.00	0.00	0.00
S79	79.40	79.40	79.40	0.00	0.00
S88	88.20	88.20	88.20	0.00	0.00
SKP	0.00	0.00	0.00	0.00	0.00

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Invoices

The **SportsBM** billing system gives you a great deal of flexibility and simplifies many tasks. Your members will appreciate the system because it allows them to write just one check per billing period to cover all of the account categories: dues, entry fee, travel fund, and taxable and non-taxable sales. It also makes it easy for you to post checks to the various categories in each account. In addition, you have the option to include a message on each invoice.

To fully take advantage of the **SportsBM** system, the following four steps are ***recommended*** but not required.

1. Consolidate all of your organization's checking accounts into one business checking account. This will reduce bank charges, check printing costs, and administration time in balancing checkbooks. If this is not possible, then you can still have the members write one check, deposit the checks in the main account and then, as often as is necessary, transfer money to the entry fee and/or travel fund accounts according to the amounts listed on the Daily Report. See the Reports /Account Financials / Financial Summaries / "Charge and Credit Totals" for a report which lists the total charges and credits for each of the five invoice categories for any month.
2. Open an organization money market account to hold surplus funds from the business checking account. Simply transfer money back and forth (probably not more than twice per month) as needed for day-to-day operations to maximize the interest earned in the money market account.
3. Print two copies of the invoices. After printing invoices, mail one copy and place the second copy alphabetically in one stack. As checks come in, pull the appropriate invoice copy, write the check number and amount on the invoice, and place the check and invoice together (not stapled) in the in-box for the computer operator who enters the transactions into the computer.
4. Buy double window #9 envelopes for mailing your invoices. The invoice contains the mailing address and the return address which will show through the double windows, thus eliminating the need for mailing labels and/or envelopes with a pre-printed return address.
5. Or, instead of or in conjunction with #4, email the invoices to those accounts that have an email address. This would require purchasing the Email Invoices option.

Print Invoices

From the Main Menu, click on **Accounts** / **Invoices**.

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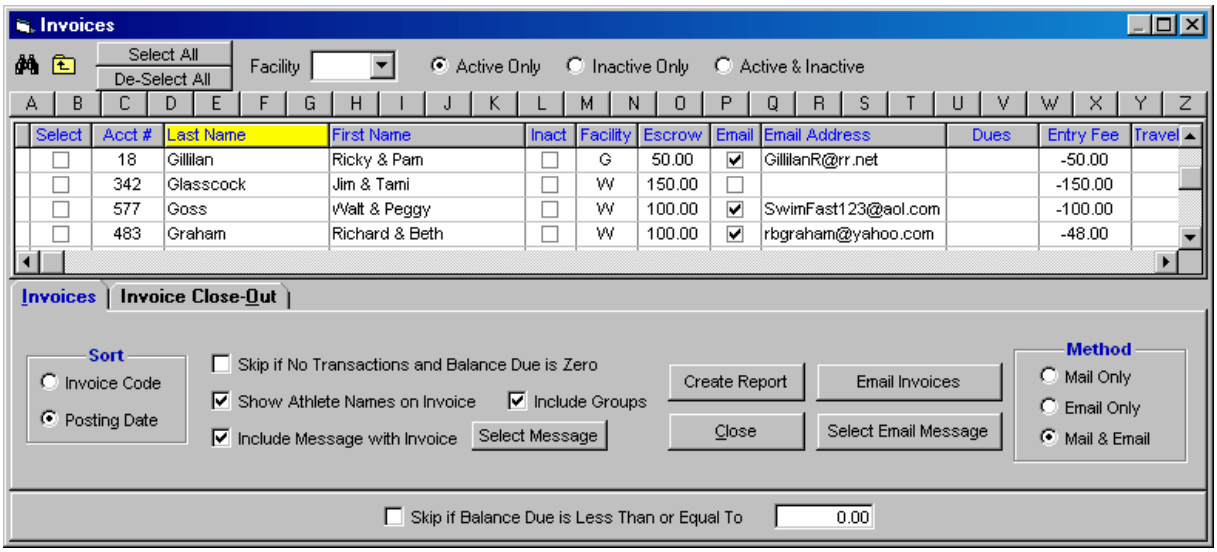

From the **Invoices Menu**, select the accounts you want to print invoices for by clicking the check boxes in the **Select** column. To select all accounts, click the **Select All** button. By default, the menu displays accounts from all facilities. To display accounts from one facility, use the **Facility combo box**. Normally you would only bill active accounts, but to show **Inactive Only** or **both Active and Inactive**, click the appropriate radio button.

NOTE: None of the account information in the Invoices Menu can be edited. The balances, activity, facility, email address and account escrow amount is for information only.

When creating invoices for printing or emailing, you have several options for what is on the invoice and how they will display.

The transactions on the invoice can be sorted in two ways:

1. by **Invoice Code** (Invoice Category)
2. by **Posting Date**.

In addition, you have the option to show athlete names at the upper right of each invoice and to have a 1 to 8 line message at the end of each invoice. To select your message, click **Select Message** and the **Invoice Messages** windows appears and you can add, edit or delete from your message list and you can select your **Favorite** message to be included with the invoices. Click Here for more on **Invoice Messages**. If you only want to send invoices to accounts that have a balance due greater than or equal to a certain amount, say $50, click the check box **Skip If Balance Due Is Less Than** and enter 50.00. This amount can be any amount including a negative amount. To save paper, clicking **the Skip If No Transactions and Balance Due is Zero** will skip printing invoices that owe nothing and have had no activity. However, if you are sending a newsletter with each invoice, then you would go ahead and print invoices for all accounts, regardless of account activity or balance due.

How to Email Invoices

NOTE: Email Invoices is an **additional** option that may be purchased and added to the basic **SportsBM** program. To see if you have this option, from the Main Menu of **SportsBM**, click **Help / About**. Click Here for information on ordering any additional options.

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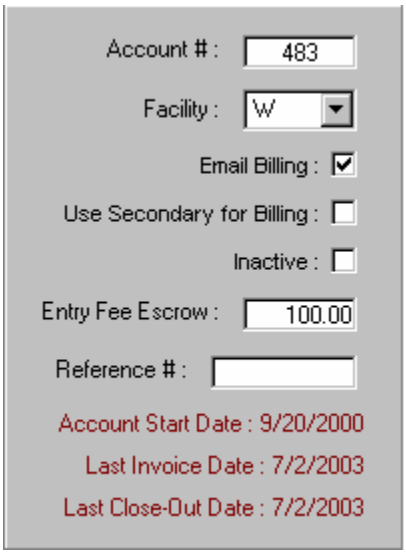
How to Email Invoices

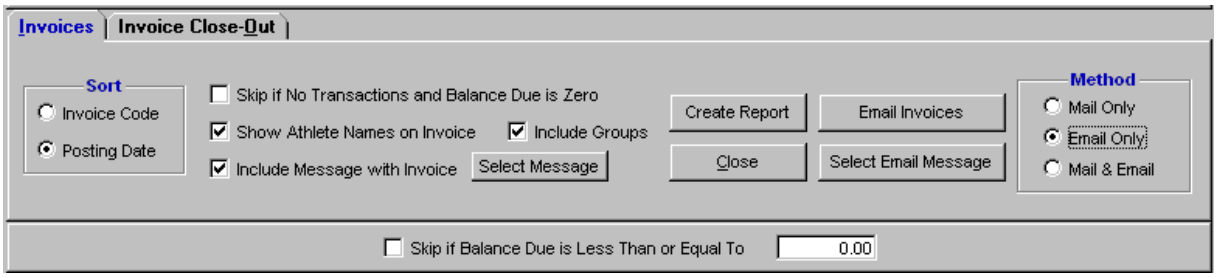
Emailing Invoices Setup

Emailing Invoices uses the same procedures as printing one or more invoices. Use the following steps to email invoices.

1. Setup your email parameters for the SMTP server by going to Setup / Facility and Invoice Setup / Emailing Invoices. Enter your SMTP and POP3 server information.
2. Setup your email introductory message by going to Setup / Favorites / Invoice Email Messages. You must create and select a message as the favorite to be included with each email containing the invoice. To select your message, click **Select Email Message** and the **Invoice Email Messages** windows appears and you can add, edit or delete from your message list and you can select your **Favorite** message to be included as the introductory paragraph of each email containing an invoice.
3. Go to Accounts and be sure each account that is to receive an emailed invoice has an email address. If the secondary address is the one that will receive the billing be sure the first person has an email address. In addition, as shown below, there is an **Email Billing** checkbox for you to indicate that the account is to be billed by email instead of by printing and mailing.



4. Go to Accounts / Invoices and click the **Email Only** radio button at the bottom right. Now select your accounts and click the **Email Invoices** button at the bottom right of the screen. After the emailing is completed, you will receive a report that details what action was taken with each account. The action will indicate each account that was successful and indicate each one where there was an error and what the error was.



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Invoice Close-Out

It is customary that, after invoices have been printed and mailed, the accounts are Closed-Out to make them ready for the next billing cycle. The Close-Out does the following:

- Removes the current transactions (all those transactions printed on the invoice) and places them in the history file of transactions so that they will not appear on the next invoice.
- Makes the five invoice category previous balances equal to their current balances.
- Makes the new previous account balance date the same as the date of the printing of the invoice.

We recommend that you Close-out accounts on the **same** day that you print invoices. We also strongly recommend that you perform a Backup **before** performing a Close-out since a Close-out is NOT reversible.

Regardless of the date when you perform a Close-out, the new previous account balance date will be adjusted as follows:

- If no invoices have ever been printed for an account, then the new previous balance date for that account will be the same as the date of the close-out.
- If no transactions have been entered for an account since the last invoice was printed, then the new previous balance date will be the same as the date the last invoice was printed.
- If transactions have been entered for an account after the last invoice was printed, then the new previous balance date will be the same as the Close-Out date. This of course is **not** the way to handle an account.

  *It is good procedure to only Close-Out an account **after** an invoice for that account has been printed and **before** any new transactions have been posted.*

  NOTE: If an invoice is printed right after a Close-Out, the invoice would have no transactions to list and the account summary at the bottom of the invoice would show the previous balances to be the same as the current balances.

Close-Out Procedure

From the Main Menu, click on **Accounts / Invoices** and then click the **Invoice Close-Out** tab at the bottom of the screen. Select the accounts you want to Close-Out using the check boxes in the Select column. To select all accounts, click the **Select All** button. By default, the menu displays accounts from all facilities. To display accounts from one facility, use the **Facility combo box**. To show **Inactive Only** or **both Active and Inactive** accounts, click the appropriate radio button.

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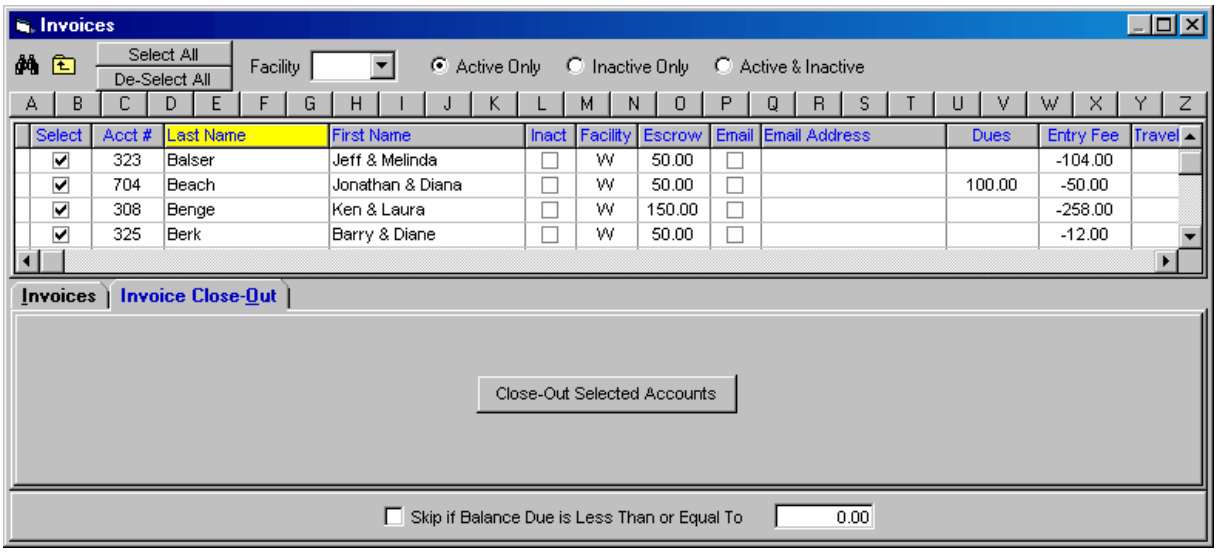
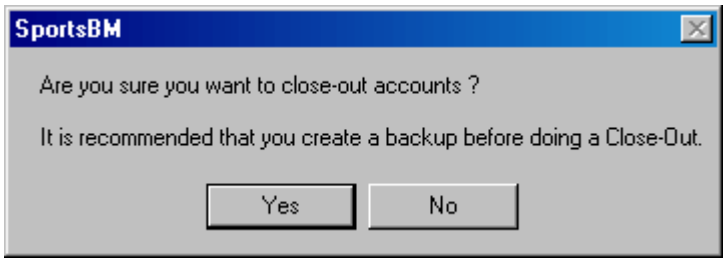


When you click the **Close-Out Selected Accounts** button, you will be prompted with this screen:



If you answer "Yes", all selected accounts will have their transactions moved to the History file. A message will then be displayed which tells you the number of accounts that were closed out and the total number of transactions that were moved to the history file.

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Checkbook Menu

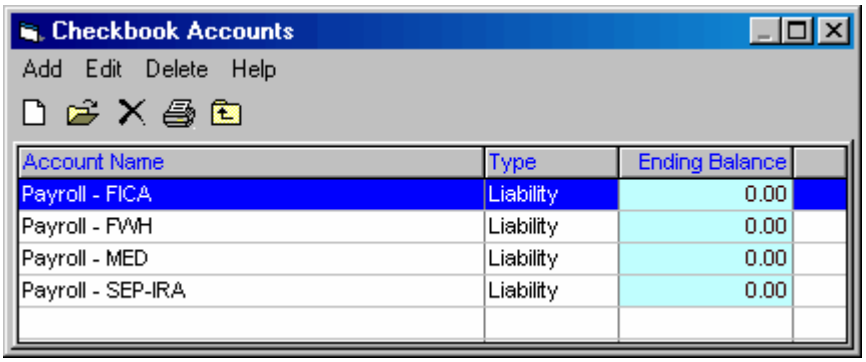
The Checkbook is an **Option** and is not included in the Start-up version of **Sports BUSINESS MANAGER**, but is purchased as an added feature and then becomes an integrated part of the program. However, the Checkbook Option is always available for evaluation, but it is limited to a maximum of 20 transactions.

The major features of the Checkbook Option are:

- Keep track of as many different bank accounts as needed.
- Track liability and asset accounts separately. Liability account examples would be Payroll FICA and Entry Fee Escrow.
- Post checks and deposits with date, check number, and optional notes.
- Divide each check or deposit into as many as 15 account categories. The number of different categories is unlimited, and each category may also have a related sub-category, such as: Pool Maintenance: Chemicals.
- Memorize (save) any transaction with its set of categories and sub-categories. This is extremely helpful for copying payments or deposits that occur frequently.
- Balance your checkbook against the bank statement.
- Create an income / expense summary for any date range.
- Create a payroll report for any period.
- Create a transaction summary.
- Filter reports to a selected set of categories and/or sub-categories.
- Create a monthly budget report.

Setting up an Account

From the Main Menu, click on **Checkbooks**, and the following screen will appear:



From this screen, you can add new accounts with their starting balance, edit the name of an existing account, or even delete an account by clicking the appropriate icon or command word. There are three types of accounts:

1. Bank Account
2. Liability Account
3. Asset Account

A bank account is a checking or savings account. Liability and asset accounts usually relate to the checking account as temporary transfer areas to track moneys that are owed to others (liability) or are being held for some special use (asset). A liability example would be Federal Payroll Taxes, and an asset example would be petty cash.

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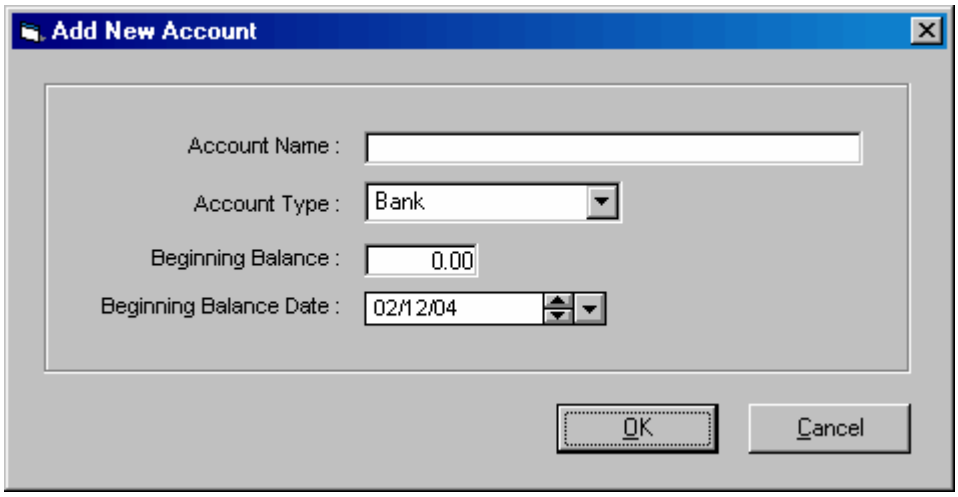
When you first start the Checkbook, four payroll liability accounts are created for you as seen above.

Getting Started

From the Checkbook Menu, click on **Add** or the **Add Icon** to enter the name of your bank checking account and select **Bank** for Bank Account type.



Next you enter an account balance and the date of the account balance. This balance is not critical at this point because you can change it later in the Checkbook Register. Most likely you will be entering checks and deposits for past months so that you can get an entire fiscal ear entered into the computer. As an example, use your January bank statement and enter the beginning balance and date that you find on the bank statement. Later, you will enter all the checks and deposits from January 1st until you are current. Along the way, you will be able to reconcile each month's bank statement (balance the checkbook), thus insuring that your data is accurate.

Checkbook Register

To select an account from the Checkbook Account List, double-click the account name or select press Enter with the account selected. This brings you to the Checkbook Register such as the one below. The columns, in order from left to right are: Check Date, Check Number, Payee (who the check or transaction is made out to), Category separated by a colon from an optional Subcategory, Note, Reconciliation Column (C), Payment Amount, Deposit Amount, and Account Balance.

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Checkbook Register

Bank Account Name: Hurricane Bank

Date	Check #	Payee	Category	Note	C	Payment	Deposit	Balance
01-Jan-03		Opening Balance			C		3,468.72	-1,031.28
01-Jan-03		Pool Rent	Pool Rental			2,500.00		-3,531.28
03-Jan-03		Deposit	Dues				7,509.50	3,978.22
06-Jan-03	3601	Bell South	Telephone		*	53.60		3,924.62
06-Jan-03	3602	ComCast	Internet		*	43.54		3,881.08
06-Jan-03	3604	Ryder Insurance	Insurance:Medical		*	150.00		3,731.08
06-Jan-03	3605	MCI	Telephone:Cell Phone		*	173.63		3,557.45
15-Jan-03	3606	Clark Center	Pool Rental	Payable on the 15th	*	1,500.00		2,057.45
20-Jan-03		Deposit	Dues		*		4,320.75	6,378.20
23-Jan-03	3607	Jackson Swim Team	Entry Fees			875.00		5,503.20
25-Jan-03	3608	Henry Marks	Travel:Per Diem			75.00		5,428.20
30-Jan-03		dues	Dues				12,120.00	17,548.20
31-Jan-03	3609	Mary Toll	Payroll:Gross Salary			773.50		16,774.70
31-Jan-03	3610	James Jones	Payroll:Gross Salary			1,547.00		15,227.70
01-Feb-03		dues	Dues				10,480.00	25,707.70
01-Feb-03		James Jones	Payroll			4,500.00		21,207.70
01-Feb-03		Pool Rent	Pool Rental			2,500.00		18,707.70
04-Feb-03		Deposit	Dues				6,744.00	25,451.70
06-Feb-03	3612	Bell South	Telephone			53.60		25,398.10
06-Feb-03	3613	ComCast	Internet			43.54		25,354.56
06-Feb-03	3614	Ryder Insurance	Insurance:Medical			150.00		25,204.56
07-Feb-03	3615	Commercial Bank	[Payroll - FWH]			909.00		24,295.56

Note that the highlighted gray transaction with the arrow at the far left is the **active** transaction. Each of the Menu Bar items displayed at the top of the Checkbook Register will be described in the following pages. One special command that is not on the Menu Bar is the Memorize command. To **Memorize** any transaction in the Register, select it and press **Ctrl-M** from the keyboard. **Ctrl-M** copies the transaction and all details associated with that transaction into a Memorized List. For more details, click Memorized Transactions.

The Reconciliation column will contain a **C** for items that have been **Cleared** reconciled with the bank statement, an asterisk for items that are in the process of reconciliation, and a blank for items not reconciled with the bank statement.

Adding New Transactions

Click **Add**, click the **Add icon**, or press **Alt-A** to add a new transaction to the register. An **Add Check/Deposit** screen is shown below.

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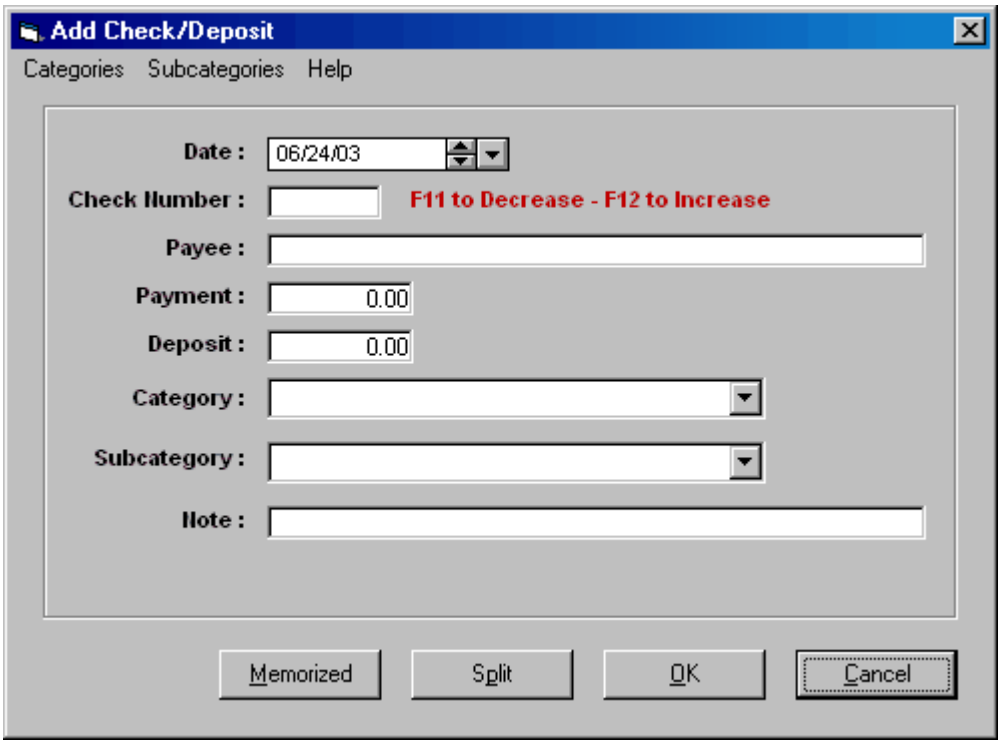

The date defaults to the date of the Checkbook Register's active transaction at the moment you click **Add**. The **Check Number** is optional, but to enter the next check number, press **F12**. To decrease the check number by 1 press **F11**. A **Payee** is required and you can enter either a **Payment** amount or a **Deposit** amount, but not both. **Categories** and **Subcategories** are optional, but if you do not enter them, the transaction will be listed as either "Other Income" or "Other Expenses" on reports. The **Note** is optional.

From the Add screen, you may click **Split** to divide the payment or credit amount into 1 to 15 Categories / Subcategories, or you may click **Memorized** to select from one of your memorized transactions. The quickest way to add recurring transactions, whether they are checks, deposits, or bank drafts, is to use the memorized transaction feature. This feature is especially helpful when doing payroll checks.

Editing Existing Transactions

To edit an existing transaction, select it and click **Edit**, click the **Edit icon**, or press **Alt-E** to edit an existing transaction. Or simply **double click** a transaction directly. An **Edit Check/Deposit** screen is shown below.

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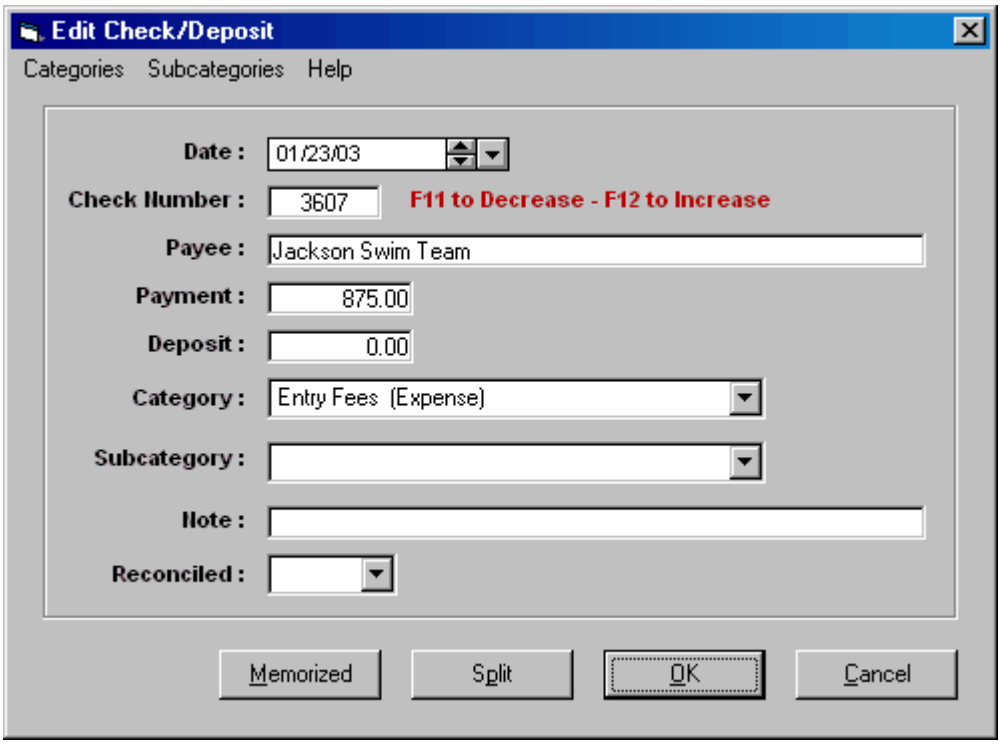

While editing a transaction, you may click **Split** to divide the payment or credit amount into 1 to 15 Categories / Subcategories, or you may click **Memorized** to select from one of your memorized transactions. Selecting a memorized transaction will replace the existing transaction. If you make a mistake, simply click **Cancel**. For more details, click on Split Transactions or Memorized Transactions.

Deleting Transactions

To delete an existing transaction, select it and click **Delete**, click the **Delete icon**, or press **Alt-D**. **Delete** means to remove a transaction from the register and update all balances. If the transaction had already been "Cleared" in a previous **Bank Reconciliation**, the beginning balance of your next bank reconciliation will be revised accordingly.

Checkbook Categories and Subcategories

In order for income and expense reports to be meaningful, each transaction in the **Checkbook Register** should be assigned to a **Category** and, optionally, to a **Subcategory**. For example, when you write a check to Ryder Insurance, you might assign it an expense category of Insurance and a subcategory of Medical.

You can have as many category names as you wish as many sub-category names as you wish. However, each transaction is limited to 15 split categories. Click Split Transactions for more information.

To Add, Edit, or Delete categories from your stored set of categories, click **Category** at the top of the Checkbook Register or press **Alt-G**. Note that a category can be either an Expense or an Income type of category.

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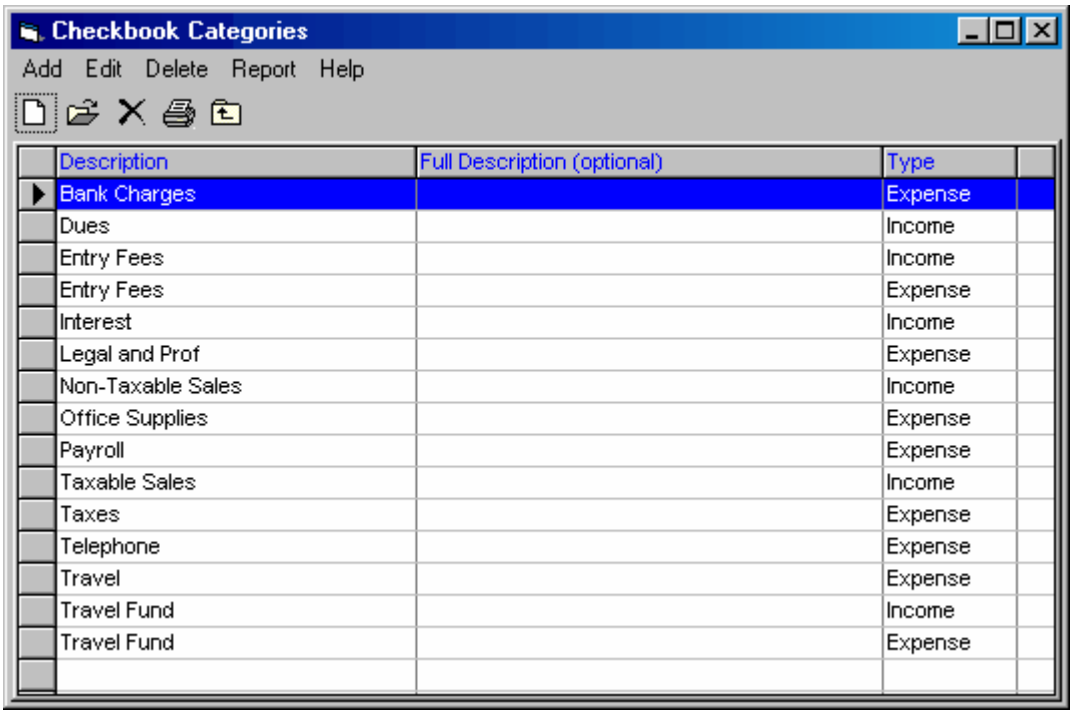
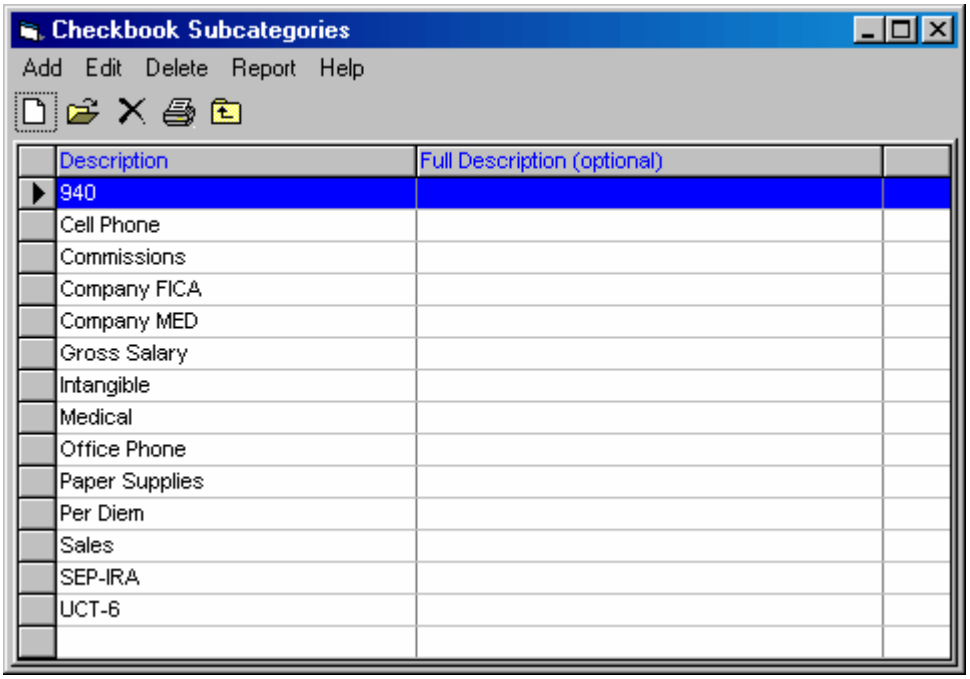


Description	Full Description (optional)	Type
Bank Charges		Expense
Dues		Income
Entry Fees		Income
Entry Fees		Expense
Interest		Income
Legal and Prof		Expense
Non-Taxable Sales		Income
Office Supplies		Expense
Payroll		Expense
Taxable Sales		Income
Taxes		Expense
Telephone		Expense
Travel		Expense
Travel Fund		Income
Travel Fund		Expense

To Add, Edit, or Delete Subcategories from your stored set of categories, click **Subcategory** at the top of the Checkbook Register or press **Alt-S**.



Description	Full Description (optional)
940	
Cell Phone	
Commissions	
Company FICA	
Company MED	
Gross Salary	
Intangible	
Medical	
Office Phone	
Paper Supplies	
Per Diem	
Sales	
SEP-IRA	
UCT-6	

The **Description** is used for the Checkbook Register, and the optional longer **Full Description** is used for reports. If no long name is entered, the short name will be used.

SportsBM defaults to a number of categories and sub-categories. You can change these to suit your needs.

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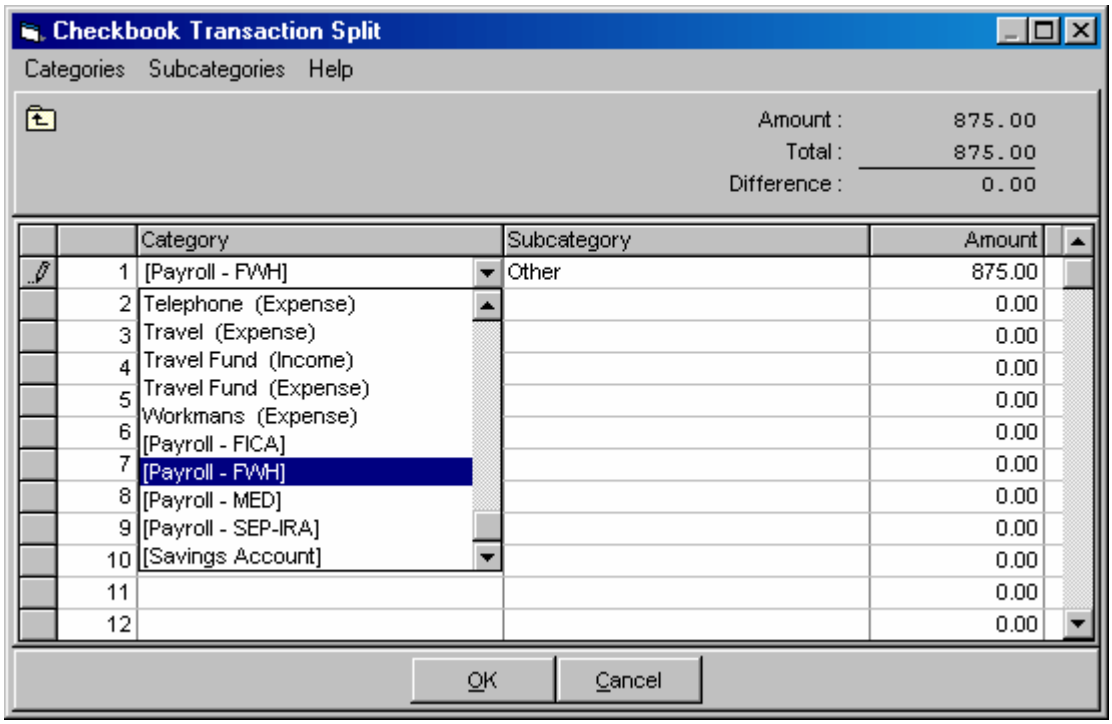
Transfers

In addition to categories and subcategories to indicate where moneys are dispersed or deposited, **Transfers** can also be used to do the same. A transfer is not a category, but acts like one. The transfers are really your accounts as shown here. Note that a transfer is always enclosed in **brackets**.



A transfer is handy because you can create several transactions in one step. For example, suppose you have set-up two accounts from the Checkbook Account Menu: 1) a bank checking account named Hurricane Bank and 2) a savings account named Savings Account. If you post a check in the Hurricane Bank checkbook register payable to the savings account, you can have the amount posted automatically to the Checkbook Register of the Savings Account as deposit. To do this, you simply add the check to the Hurricane Bank register and select [Savings Account] for the category. This creates a second transaction which will be placed in the Checkbook Register of the Savings Account with a category showing that it came from [Hurricane Bank]. To see this second transaction, click Accounts from the top of the Hurricane Bank register, select the Savings Account, and in the Savings Account register, find the new transaction that shows the transfer from Hurricane Bank.

Another important use of the transfer concept is in handling payroll. For example, you pay someone $1000.00 gross salary on the 15th of the month; make out the check for $773.50 because you have to deduct withholding and FICA from the check and pay that to the government at the end of the month. In addition, you have to pay a matching FICA contribution from the company. This is perfect for the transfer concept. You will enter one $773.50 check payment in the Hurricane Bank register, and it can automatically create three new transactions, one in each of three transfer liability accounts: Payroll - FWH, Payroll - FICA, and Payroll - MED. Click Payroll to see a specific example in detail.

Split Transaction

A split transaction means that a payment or deposit in a bank account is divided into more than one category. The limit on the split is that it may be divided into 15 different categories. There are three ways to enter a split transaction:

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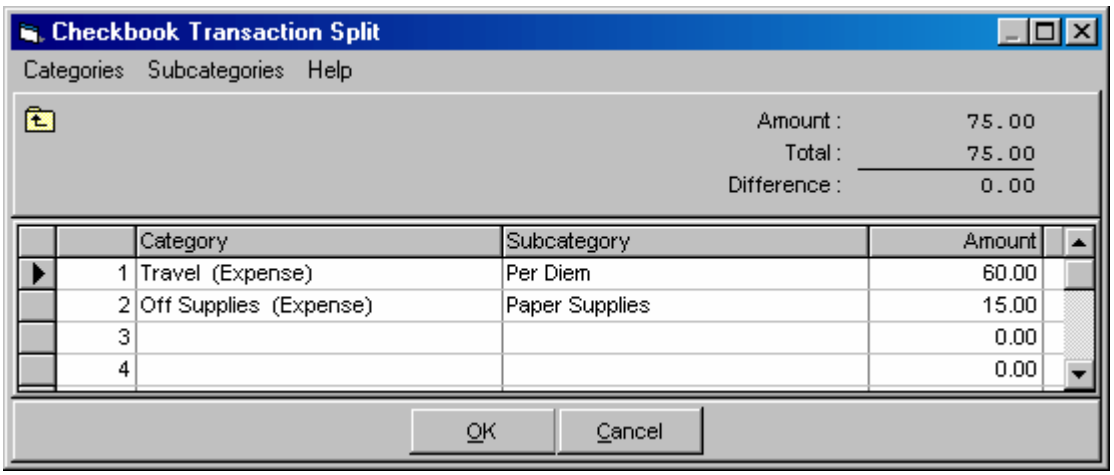
1. When a transaction in the register is selected, click Split at the top of the Register.
2. When adding a transaction, click the Split button.
3. When editing a transaction, click the Split button.

In all cases the sum of the split categories should add up to the payment or the deposit amount. Here is a simple split transaction screen with two categories for a $75 check payment:



As you add categories, the math is performed and the upper right of the screen shows you the difference between the transaction amount and the sum total of the category amounts. Note that amounts can be negative numbers, but the total must be a positive number.

To enter categories to the screen above, click the down arrow in a given cell. That will display a category list such as one shown on a previous page. When you click any cell within the Category or Subcategory column, the down arrow appears for you to make your selection.

Memorized Transactions

This is by far the most powerful feature of the Checkbook Option. It allows you to save an unlimited number of complete transactions for later use. Memorized transactions save all Categories, Subcategories, and Transfers that are included, even if the transaction memorized is a split transaction. The only parts that will not be memorized are the transaction date, the check number, and the reconciliation status. The screen below shows a few memorized transactions.

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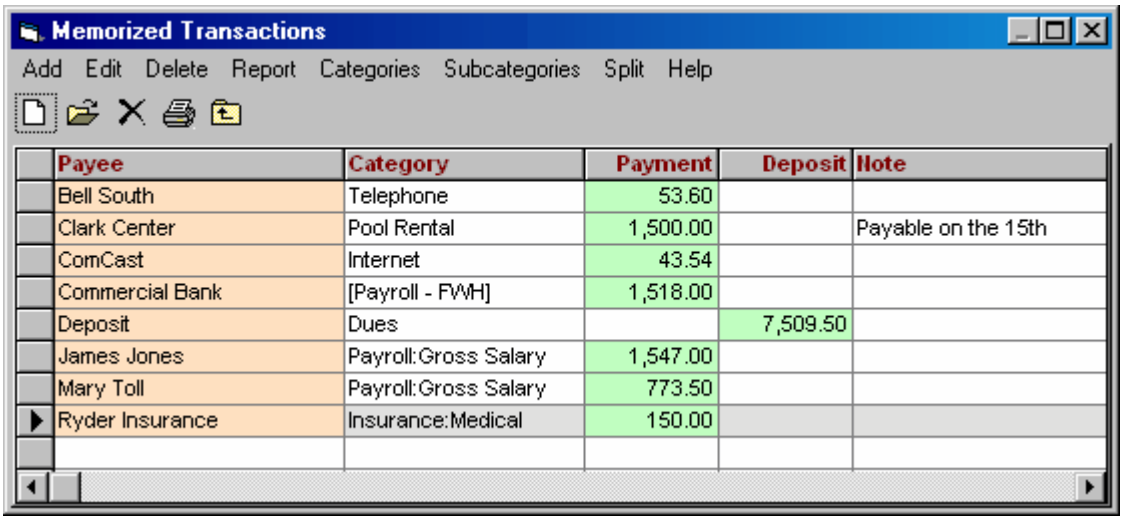
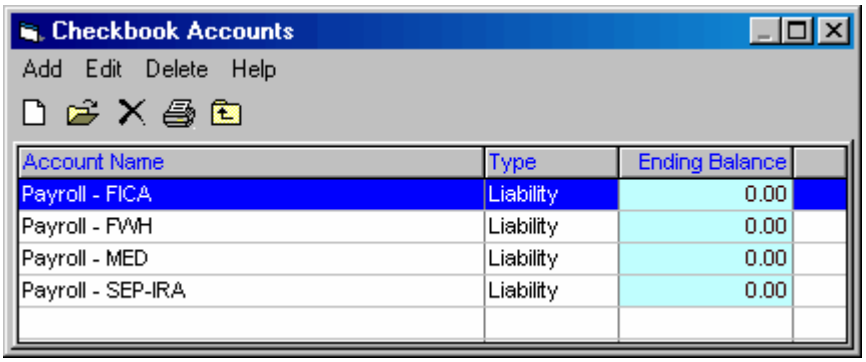


Payee	Category	Payment	Deposit	Note
Bell South	Telephone	53.60		
Clark Center	Pool Rental	1,500.00		Payable on the 15th
ComCast	Internet	43.54		
Commercial Bank	[Payroll - FWH]	1,518.00		
Deposit	Dues		7,509.50	
James Jones	Payroll:Gross Salary	1,547.00		
Mary Toll	Payroll:Gross Salary	773.50		
Ryder Insurance	Insurance:Medical	150.00		

You can Add, Edit or Delete from the list. If you click Split, you can enter up to 15 categories / subcategories. Click Categories or Subcategories at the top to add or edit to your category and subcategory list. The easiest way to add memorized transactions is to select a transaction in the Checkbook Register and then press **Ctrl-M**. If there is a memorized transaction already saved with the same **Payee**, you will have the option to **Replace** it or to **Add** it as a new memorized transaction.

Payroll

When entering checks in the register that have to do with payroll, it is important that you only use categories or transfers that use the word payroll as the first seven characters of the category name or transfer account. **SportsBM** defaults to four liability accounts named **Payroll-FWH, Payroll-FICA, Payroll-MED,** and **Payroll-SEP-IRA**. You may also need a liability account called **Payroll-STATE** if you have to withhold state taxes from each paycheck. Click Accounts / Add to add needed liability accounts.



Account Name	Type	Ending Balance
Payroll - FICA	Liability	0.00
Payroll - FWH	Liability	0.00
Payroll - MED	Liability	0.00
Payroll - SEP-IRA	Liability	0.00

For Payroll, you will also need some subcategories, and the Checkbook starts out with **Gross Salary, Company FICA, Company MED, SEP-IRA,** and **Commissions**.

To see how these categories are used, suppose an employee is paid $2000.00 per month and 15% is contributed to his/her SEP-IRA. The check would be made out for a net of $1,547.00 after deductions. A sample split transaction is shown on the next page. Notice that the categories with a negative number are transfers and that these amounts are subtracted from the Gross Salary. There are two **Payroll-FICA** transfers and two **Payroll-MED** transfers to explicitly show that half of the amount that goes to the government comes from the employee and half from the "company". This transaction

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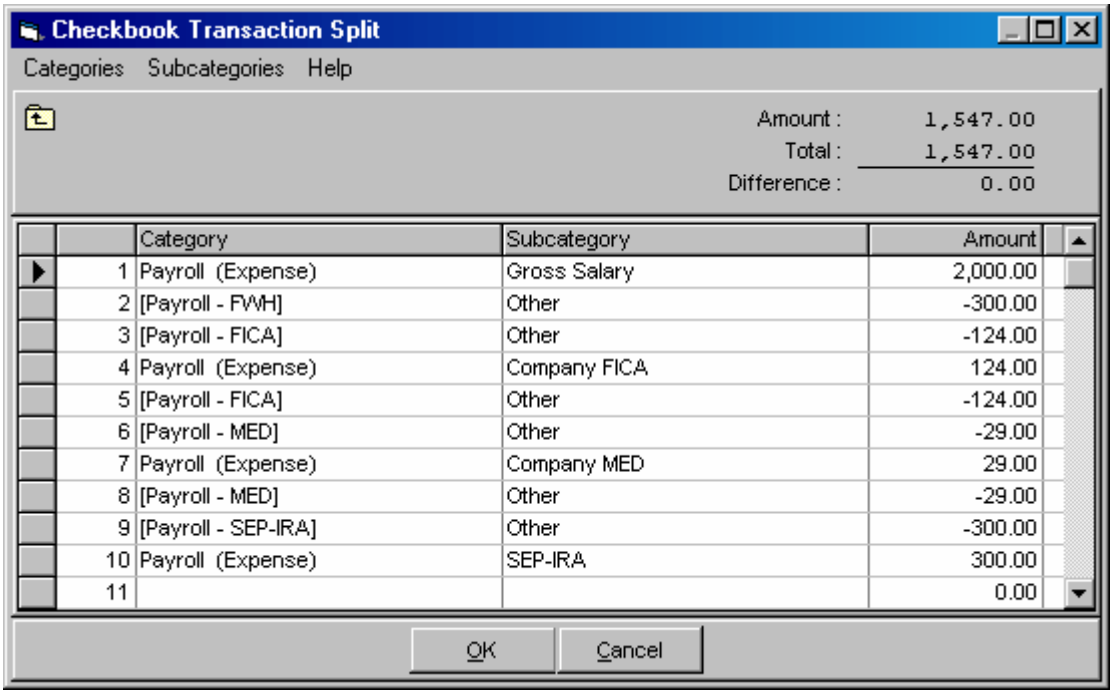
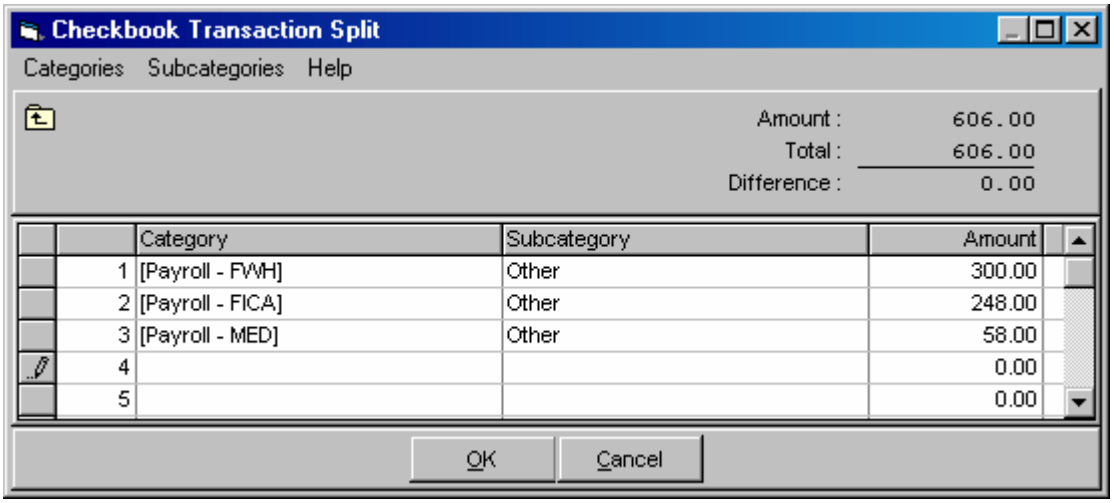
would cause 6 transactions to automatically be created in the corresponding liability accounts. If you go to the liability accounts, you would see that their balances increased as follows: $300.00 to **Payroll-FWH**, $248.00 to **Payroll-FICA**, $58.00 to **Payroll-MED**, and $300.00 to **Payroll-SEP-IRA**.



	Category	Subcategory	Amount
1	Payroll (Expense)	Gross Salary	2,000.00
2	[Payroll - FWH]	Other	-300.00
3	[Payroll - FICA]	Other	-124.00
4	Payroll (Expense)	Company FICA	124.00
5	[Payroll - FICA]	Other	-124.00
6	[Payroll - MED]	Other	-29.00
7	Payroll (Expense)	Company MED	29.00
8	[Payroll - MED]	Other	-29.00
9	[Payroll - SEP-IRA]	Other	-300.00
10	Payroll (Expense)	SEP-IRA	300.00
11			0.00

Once you enter a payroll transaction using a set-up like the one above, it is important to memorize the transaction so that you do not have to enter this set of split categories again. Just re-use what you have saved, and if any of the numbers are different the next time, just pull in the memorized transaction and edit the split amounts.

At the end of the month, you must pay out the withheld amounts using your Federal Deposit Coupon. Your check for $606 might be made out to Commercial Bank, and your split transaction would look like the following.



	Category	Subcategory	Amount
1	[Payroll - FWH]	Other	300.00
2	[Payroll - FICA]	Other	248.00
3	[Payroll - MED]	Other	58.00
4			0.00
5			0.00

After this transaction is completed, the balances to Payroll-FWH, Payroll-FICA, and Payroll-MED will

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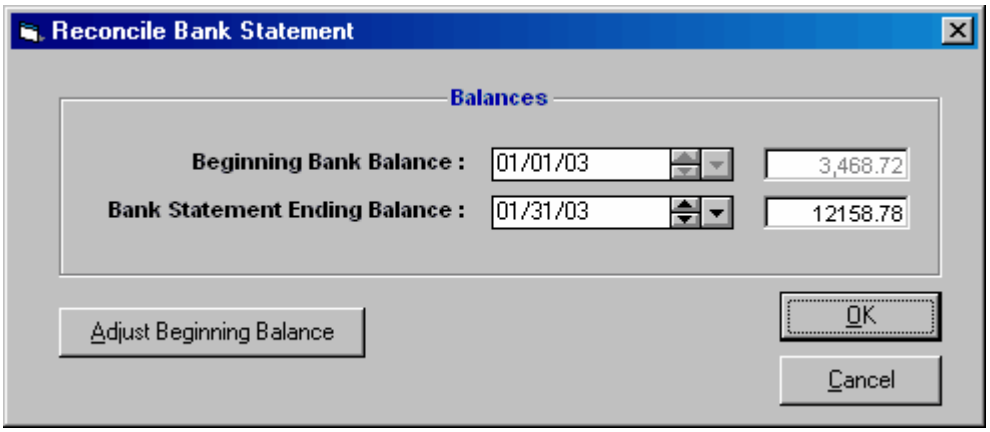
be decreased by the amounts listed. In order to "pay out" the balance in the Payroll-SEP-IRA liability account, you would write a $300.00 check to the firm handling the SEP-IRA, and your single category for this check would be [Payroll-SEP-IRA].

Reconcile Bank Account

Reconciling means balancing your checkbook against the bank statement. You can only reconcile bank accounts. Liability and asset accounts are not reconciled. To reconcile, click on **Reconcile** from the top of the Checkbook Register. The last reconciled balance amount and date will appear, and this amount should match the beginning balance on your bank statement. Find the ending balance and date on the bank statement and enter that date and amount.



Upon entering the ending balance of say $10,107.70 for January 31, 2003, a list of unreconciled transactions will be listed in date order with income items first followed by expense items that do not have a check number, and then expense items that do have a check number. A sample **Reconcile List** is shown on the next page.

Looking at your bank statement, click the **Clear** check box in the Reconcile List for each item found on the bank statement. This includes cancelled checks, deposits and bank drafts. If there are items in your bank statement that are not in the Reconcile List, such as the interest earned, exit the Reconcile List and add those transactions to the Checkbook Register. Then click **Reconcile** again and you can continue where you left off.

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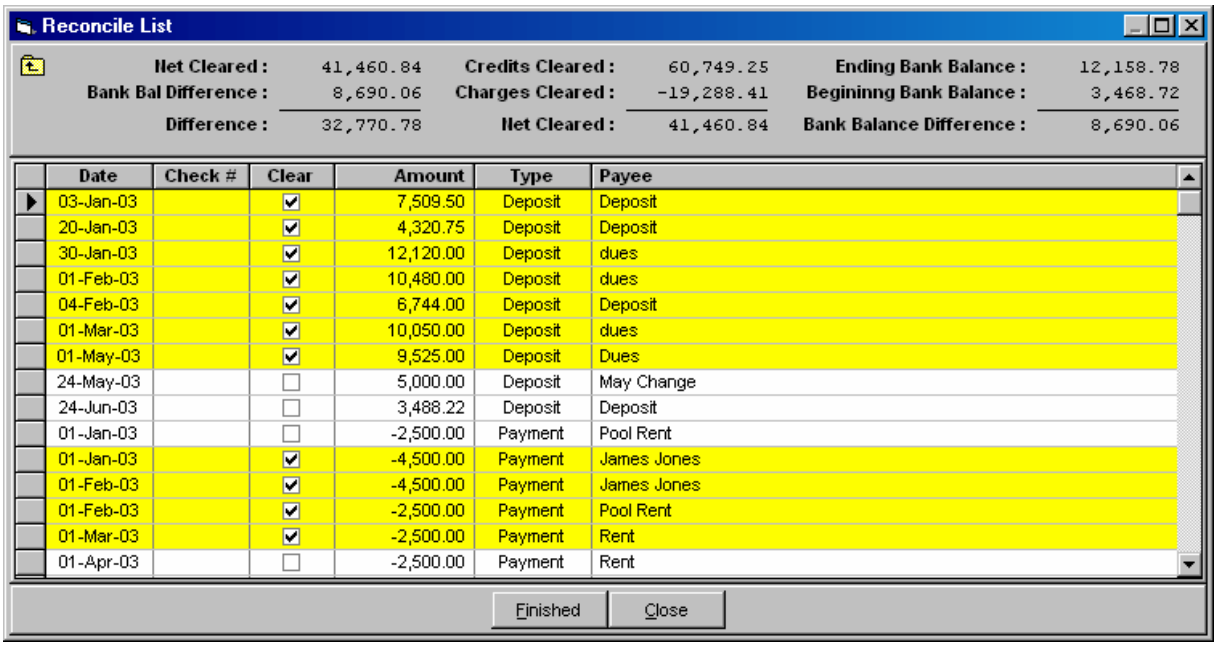

Date	Check #	Clear	Amount	Type	Payee
03-Jan-03		☑	7,509.50	Deposit	Deposit
20-Jan-03		☑	4,320.75	Deposit	Deposit
30-Jan-03		☑	12,120.00	Deposit	dues
01-Feb-03		☑	10,480.00	Deposit	dues
04-Feb-03		☑	6,744.00	Deposit	Deposit
01-Mar-03		☑	10,050.00	Deposit	dues
01-May-03		☑	9,525.00	Deposit	Dues
24-May-03		☐	5,000.00	Deposit	May Change
24-Jun-03		☐	3,488.22	Deposit	Deposit
01-Jan-03		☐	-2,500.00	Payment	Pool Rent
01-Jan-03		☑	-4,500.00	Payment	James Jones
01-Feb-03		☑	-4,500.00	Payment	James Jones
01-Feb-03		☑	-2,500.00	Payment	Pool Rent
01-Mar-03		☑	-2,500.00	Payment	Rent
01-Apr-03		☐	-2,500.00	Payment	Rent

Continue the process of clearing the items on the bank statement until the **Difference** value at upper left is zero. When the Difference value equals zero, the reconciliation process is completed and you click **Finished**. All items that were checked as Clear will now have **C** in the "C" column of the Checkbook Register. All uncleared items will be blank or may have an asterisk if the reconciliation was not completed.

If you cannot balance an account, you may have to enter an adjustment amount in the Checkbook Register. For example, if the difference is -8.76, enter a deposit adjustment of 8.76 and mark it with an asterisk. This of course is not normal, but may be required if you can't figure out the problem.

Auto Deposit

After you have posted checks to individual accounts in the Accounts Menu, it is recommended that you print the Daily Report which shows, among other things, the day's deposit amount. To enter the deposit amount shown on the Daily Report, click on **AutoDeposit** at the top of the Checkbook Register. A screen similar to the one below will appear.

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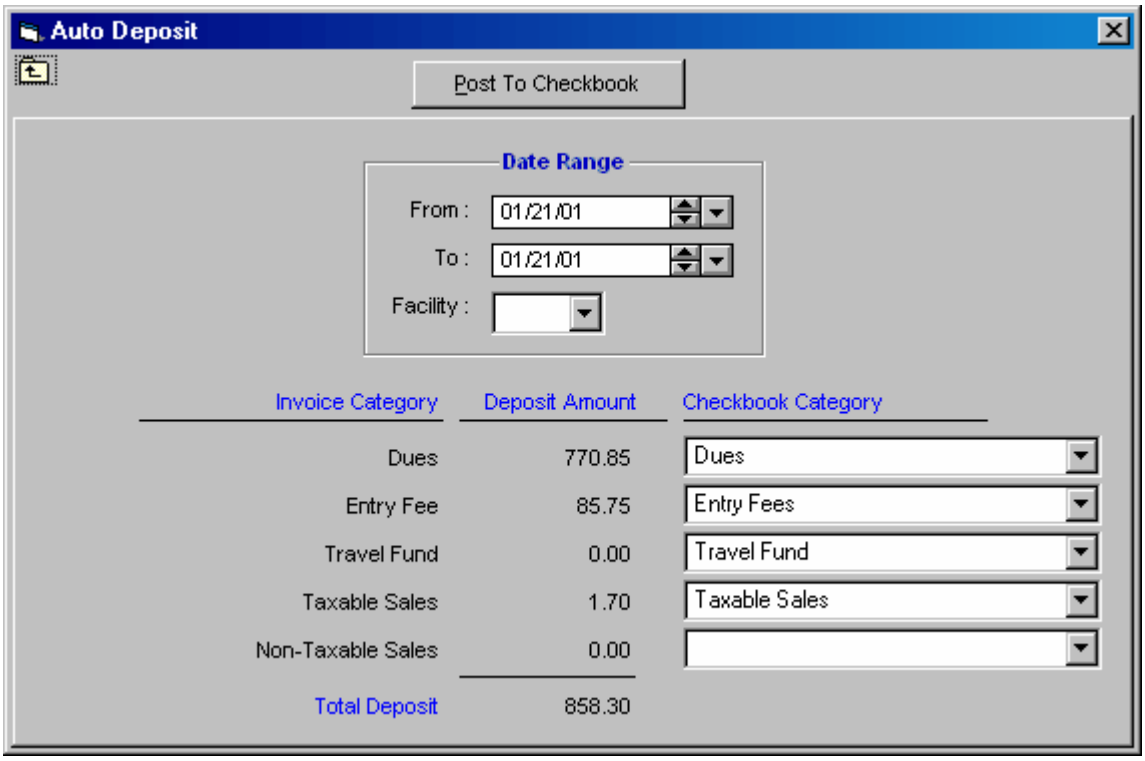

Enter the date range which the Daily Report spanned, and the amounts for the five invoice categories will be shown. The corresponding income checkbook category will be selected for you to the right of each amount. If there is no checkbook category selected, you may choose one. If you cannot find an appropriate category, exit from the Auto Deposit screen and click on Category at the top of the Checkbook Register to add a new income category to match the invoice category. Once you are satisfied with your choice, click "Post to Checkbook", and the Checkbook Register will be updated.

Checkbook Reports

There are five reports available when you click on **Reports** from the Checkbook Register.

Summary Report

This report summarizes income, expenses, and transfers for any date range. It also allows you to include all categories or to select which categories, sub-categories, and transfers that you wish to include. All unselected categories are then excluded from the report. If you have more than one bank account, you can click Selected Accounts and pick from the bank account list.

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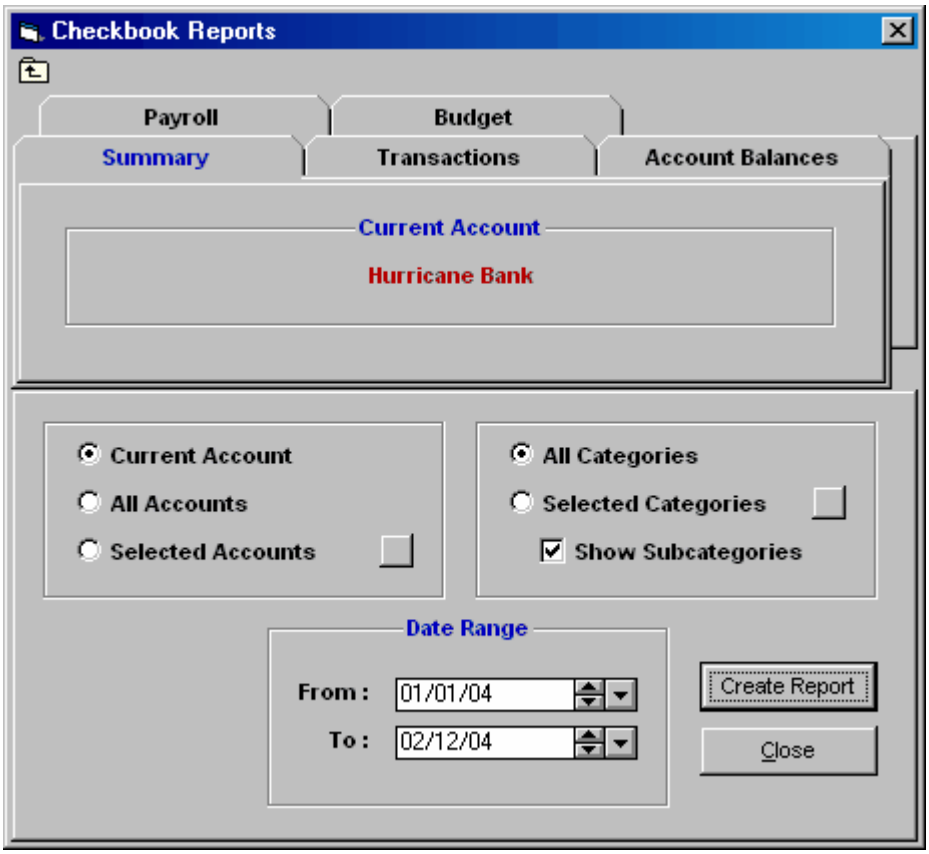

Transactions Report

This report will list all transactions within any date range and give you total inflows and outflows. You can also choose from a category list to include all categories or selected categories. If you choose all categories, split transactions are shown as one total transaction. If you choose selected categories, each split transaction will be listed as a separate transaction with its split amount. The list can be sorted by date or alphabetically.

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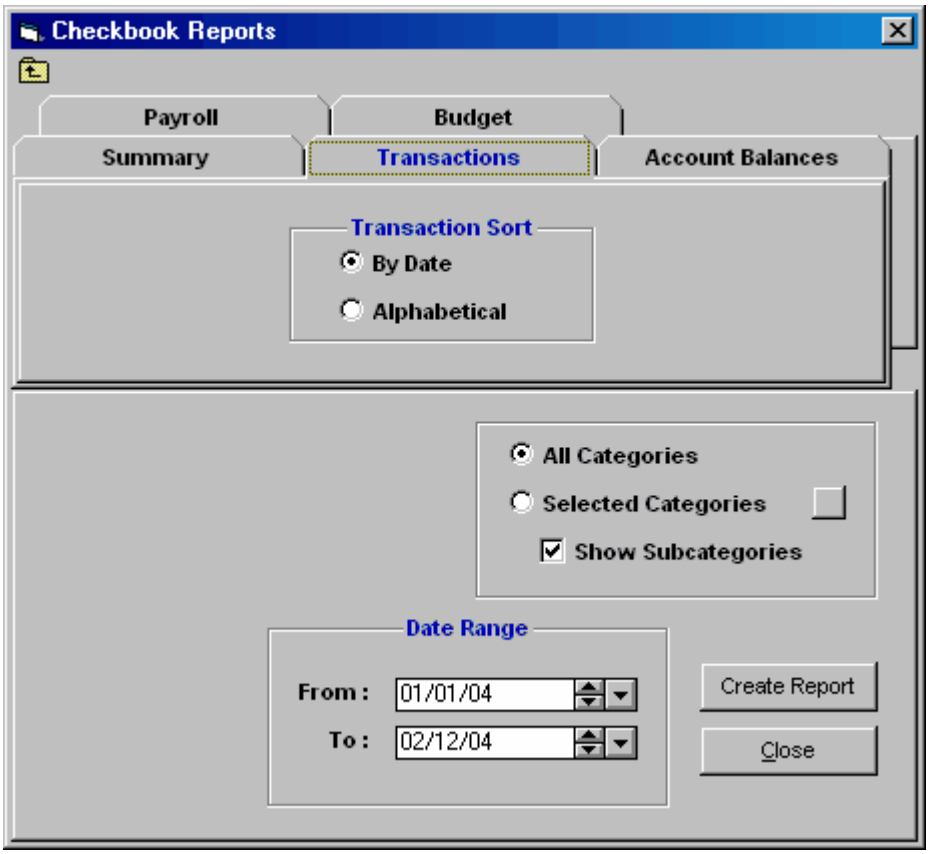

Account Balances Report

This report summarizes the balances for all accounts as of any date. Assets and Bank accounts are listed first and then Liability accounts. The sum of Assets plus Bank accounts minus Liabilities gives you Net Worth.

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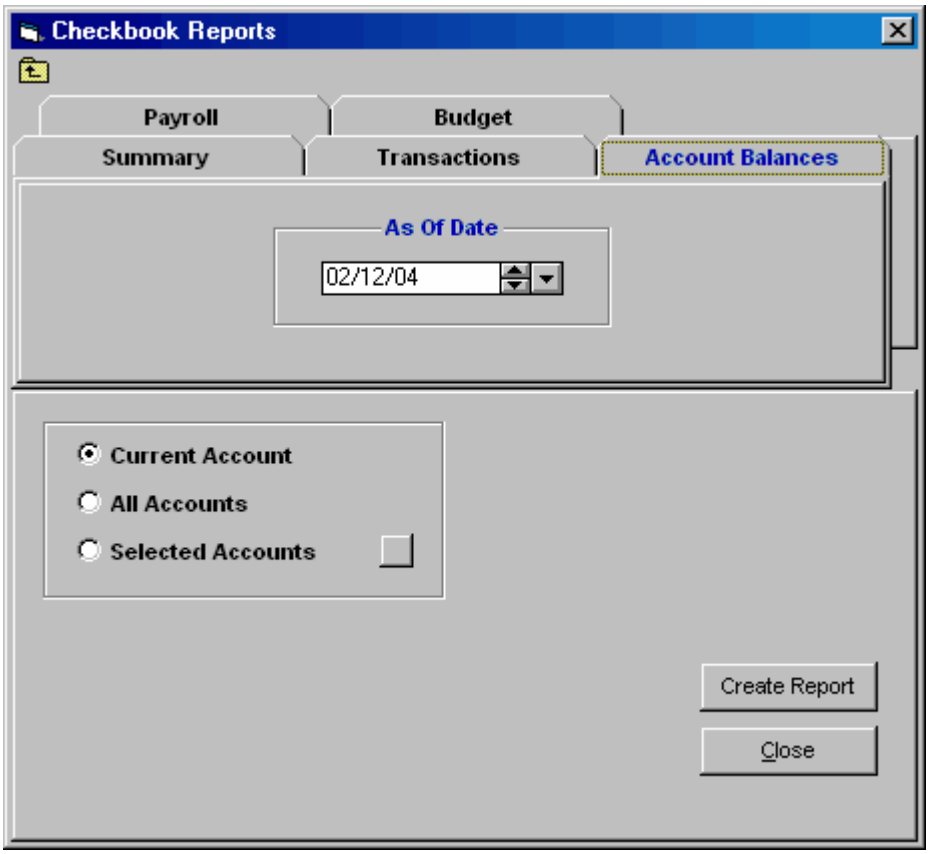

Payroll Report

This report is similar to the Summary Report, except that it is specifically designed to include only categories and transfers that use the word "Payroll" for the first seven letters of their name. In addition, it will summarize every employee separately.

You also have the option to do a separate report for each employee which shows the gross pay and all deductions. This report could be handed out with the paycheck. The employee report can be created for any date range and is useful at the end of the year when doing W-2's.

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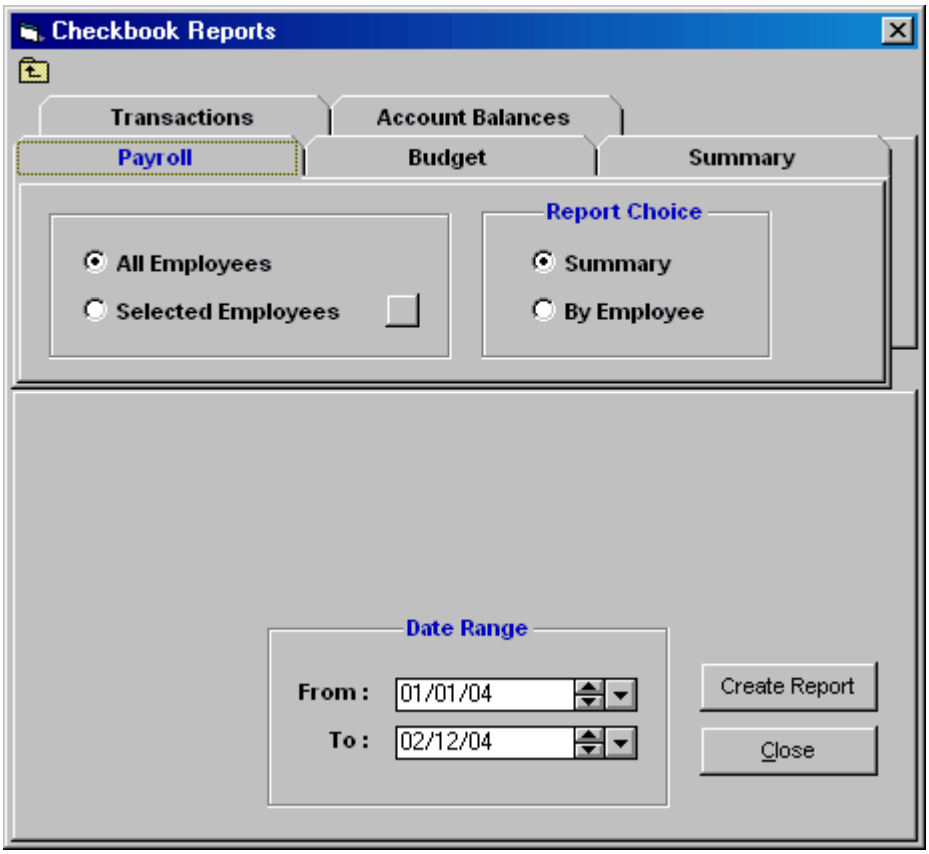
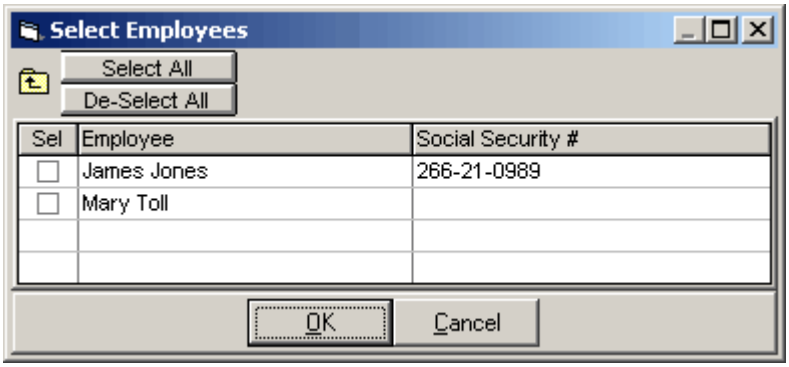


To enter social security numbers for employees who have had at least one payroll check, enter the date range from the earliest check date to the present and click on Selected Employees. This will give you a list like the following where you can type in the Social Security Number.



Budget Report

When you select budget report, you enter a range of dates which cover 12 months or less. You have the option to include all categories or not. **Subcategories** are not used in the budget report. Only Bank accounts can be used, and you can combine several bank accounts by using the **Selected Accounts** button.

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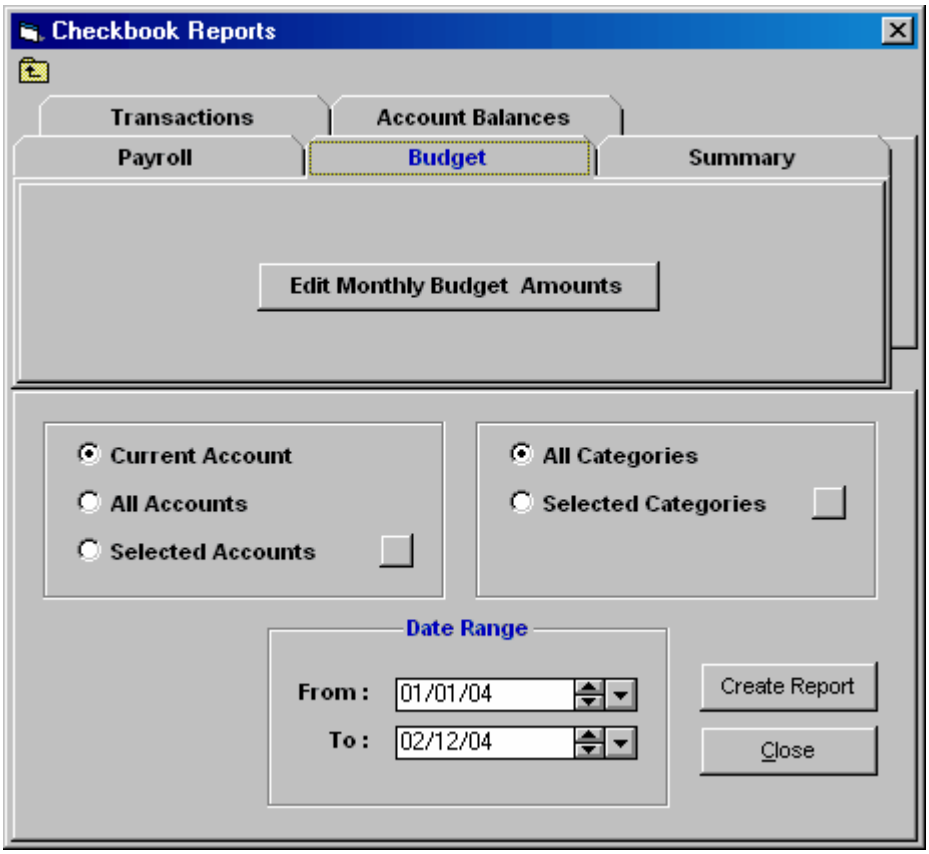
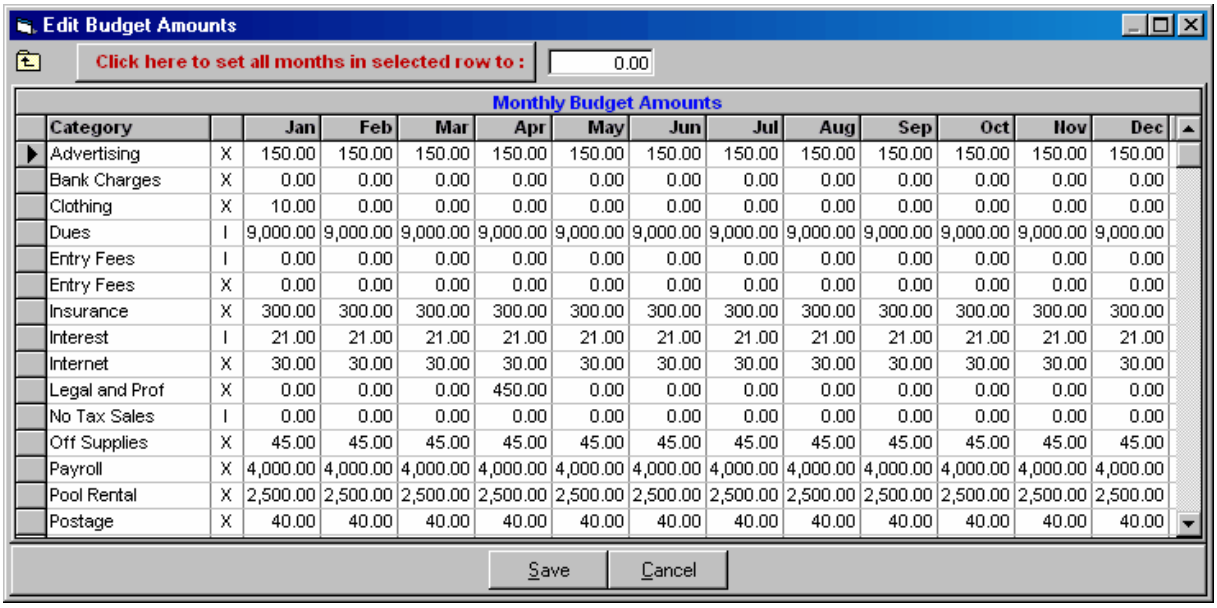


For each category, you can enter a budget amount that is different for each month of the year, or you can make the budget amount for each month the same. The report will show the category, the actual expense or income for the category, the budget amount, and an "over" or "under" budget amount.

To enter your budget amounts, click on **Edit Monthly Budget Amounts** and you will get a screen similar to the one below.



Category		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Advertising	X	150.00	150.00	150.00	150.00	150.00	150.00	150.00	150.00	150.00	150.00	150.00	150.00
Bank Charges	X	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Clothing	X	10.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Dues	I	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00	9,000.00
Entry Fees	I	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Entry Fees	X	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Insurance	X	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00
Interest	I	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00
Internet	X	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00
Legal and Prof	X	0.00	0.00	0.00	450.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
No Tax Sales	I	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Off Supplies	X	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00
Payroll	X	4,000.00	4,000.00	4,000.00	4,000.00	4,000.00	4,000.00	4,000.00	4,000.00	4,000.00	4,000.00	4,000.00	4,000.00
Pool Rental	X	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00	2,500.00
Postage	X	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00

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You can edit any month's budget amount by clicking directly into any cell. If the budget amount is the same for every month, select the category row, enter an amount at the top and **click Click here to set all months in the selected row to**. The same amount will be instantly enter for the entire 12 columns for the given row.

When you are satisfied with the budget amounts, click the Save button and that takes you back to the Budget Report where you can click Create Report to print your budget report. A report similar to the one below will be created.

Budget - Hurricane Bank
1/1/2003 to 6/26/2003

Income	Actual	Budget	Difference
Dues	53,997.47	$54,000.00	($2.53)
Entry Fees	1,040.00	$0.00	$1,040.00
Total Income	55,037.47	$54,000.00	$1,037.47

Expense	Actual	Budget	Difference
Entry Fees	875.00	$0.00	$875.00
Insurance	300.00	$1,800.00	($1,500.00)
Internet	87.08	$180.00	($92.92)
Office Supplies	15.00	$270.00	($255.00)
Payroll	26,679.50	$24,000.00	$2,679.50
Pool Rental	14,000.00	$15,000.00	($1,000.00)
Telephone	280.83	$0.00	$280.83
Travel	60.00	$0.00	$60.00
Other	4,500.00	$0.00	$4,500.00
Total Expenses	46,797.41	$41,250.00	$5,547.41
Total Income/Expense	8,240.06	$12,750.00	($4,509.94)

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Reports / Labels

This Section describes all the various reports that are available from **SportsBM**. The only labels available are Mailing Labels found in the Administrative Reports section.

NOTE: The **Checkbook Reports** are described Here under the Checkbook Menu Section.

Click on **Reports** from the Main Menu Bar and then choose from the following types of reports:

- Administrative (includes labels)
- Account Financials
- Athlete Registration

Athlete Registration only applies to Swimming.

NOTE: SportsBM offers numerous reports under the groupings of **Administrative**, **Account Financials**, and **Labels**.

NOTE: All Administrative Reports have the same filters listed at the bottom half of the screen. The top half of the screen changes with the various report selections.

Administrative Report Choices

Addresses / Account Lists
Athlete Rosters
Attendance Lists
Mailing Labels
Medical / Custom Info
Registration Check

Account Financials

Account Balances
Transaction Summaries
Financial Summaries
Athlete Posting Lists

Labels

Mailing Labels

Preview Screen Tool Bar

The Preview Screen Tool Bar is displayed on the top of each report's Preview Window.

- Click on the "X" on the left side of the Tool Bar to close the Preview Window.
- The left and right arrows allow you navigate through the pages of the report.
- Click on the Printer icon to actually start printing the report. You will be given the option to print the current page or a specific set of pages for each report - for example, print only pages 11-14.
- Click on the Printer Setup icon to select the printer that you wish to use for this report. HY-TEK suggests you set up your printer defaults using Printer Preferences.

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- Click on the Export Report icon to export your report to Excel, Lotus, Microsoft's Word, CSV file, HTML, rich text, etc. HTML is the format used to display the report on the Internet. If you are going to use the report Export for this, HY-TEK suggests using the **Draft 3.0 Standard** from the pull-down list.

- Click on the Preview Sizing arrow to resize the Preview Window.

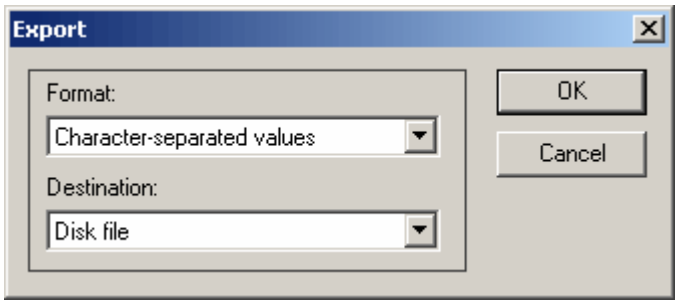
It is highly recommended that you NOT use **Dot-Matrix** printers for reports because the true type fonts will cause the printer to print very slowly. Using a Dot-Matrix for entry cards and labels should print quickly as there are specific choices for dot-matrix printers.

If you have problems printing on the Dot-Matrix printer, please go to your printer vendor's web site and download the latest printer driver. Please note that Windows NT does not have drivers for many of the older Dot-Matrix printers.

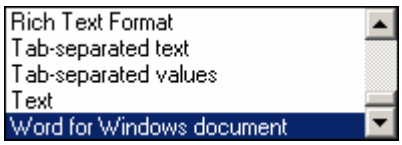
Report Exports

After a report is displayed on screen, you have options for exporting the report to various formats.

You can click on the Export Report icon which looks like an envelope. This brings up the following window:



Leave the Destination as Disk File. When you click on the Format combo box, which contains several options, a few of which are displayed below:



Select the format and then click Ok on the Export window shown above. You then are directed to pick a directory/folder for the file to be copied to. The save to folder will always be a Temp folder several levels down in Documents and Settings. This is usually an inconvenient location, so you can change it to any folder you wish and change the name of the file to be created. A sample window is shown below:

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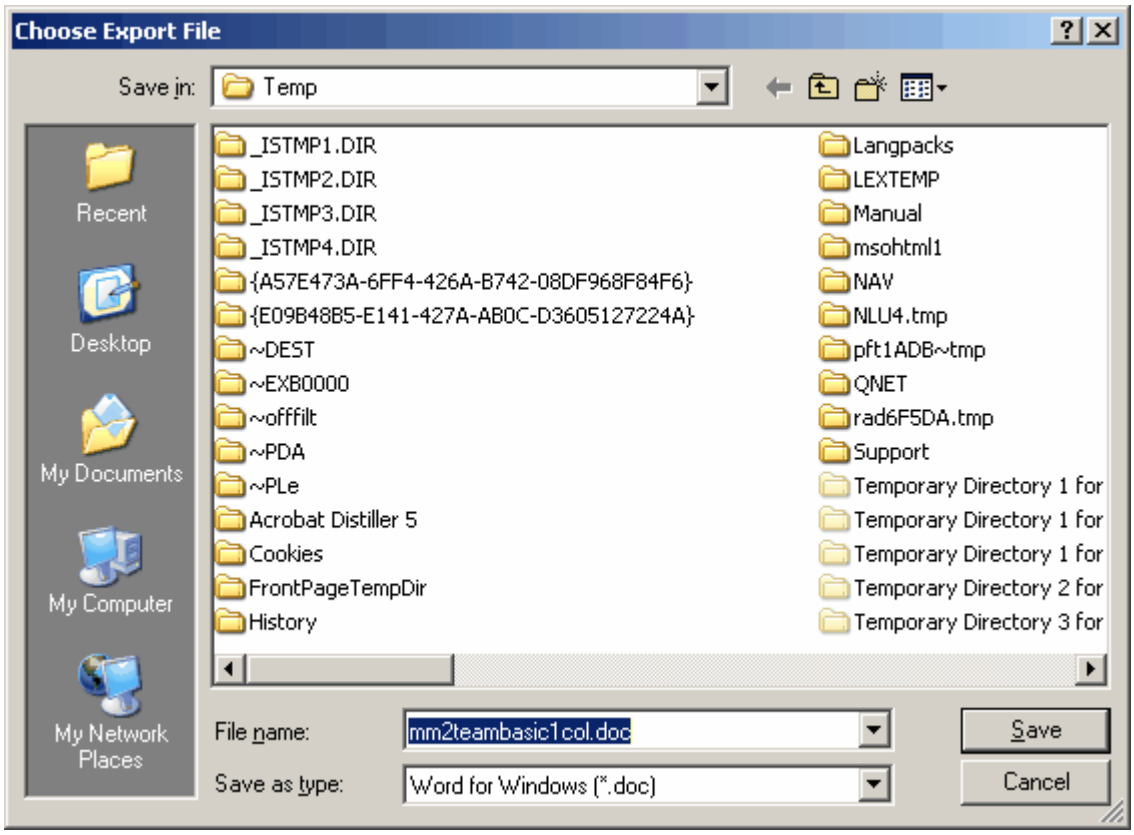

Exports to PDF Format

You can export any MM report to PDF if you have a purchased version of Adobe Acrobat installed on your computer or if you have downloaded another type PDF Distiller such as ones found on the following web site: http://www.handyarchive.com/free/distiller. If you do not purchase the distiller and use a free one, it will put a logo on every page and this is probably not what you will want.

With the purchased version of Acrobat Reader, you will have what is called the Acrobat Distiller installed and it will be listed in Windows as one of your printers.

When your report is displayed on screen in MM, you can click on the Printer Setup icon at the top of the report to select the distiller from the list of printers as follows:

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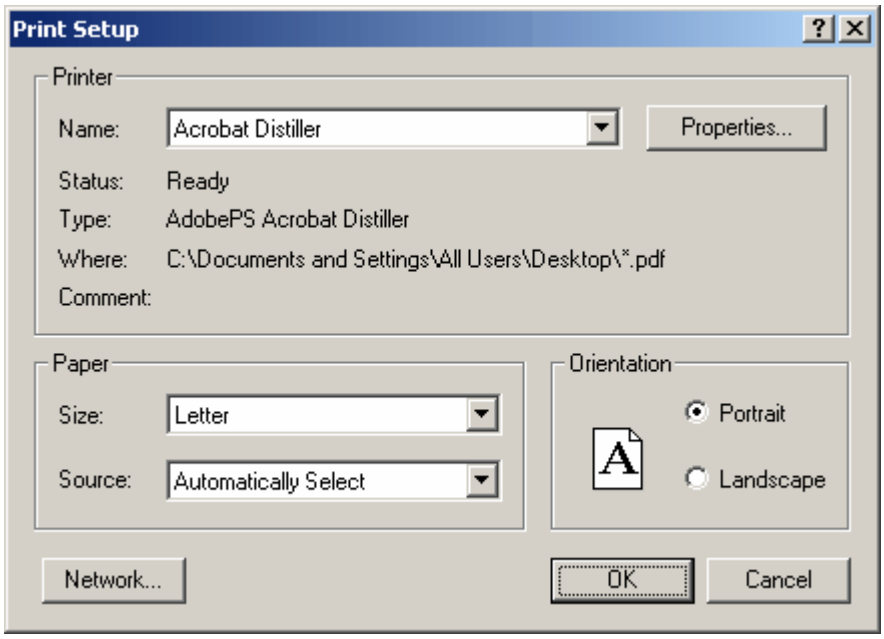
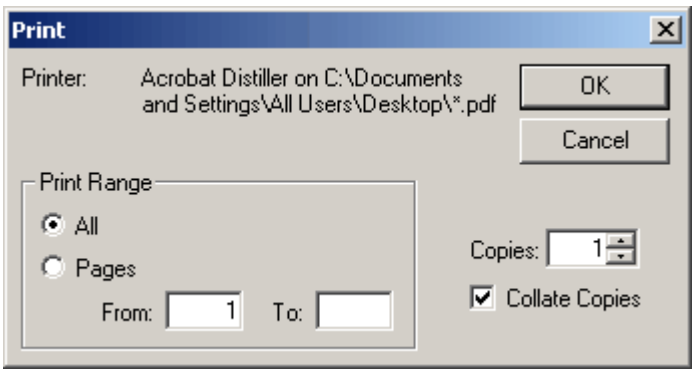


Click OK and then click the Printer icon at the top of the report which is just to the left of the Printer Setup icon and you will receive a window like this one:



Click OK and a pdf will be created and you will be given a window where you can **name the pdf file** and **select the folder** where you want the pdf copied to.

Exports to Word Format

After a report is displayed on screen, you can click on the Export Report icon which looks like an envelope. This brings up the following window:

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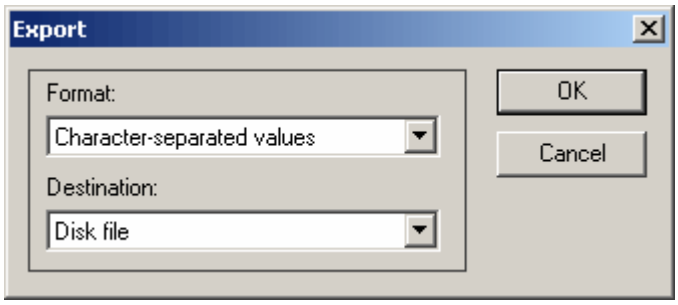
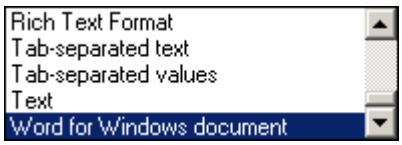


Leave the Destination as Disk File. When you click on the Format combo box, select Word for Windows document and click Ok.



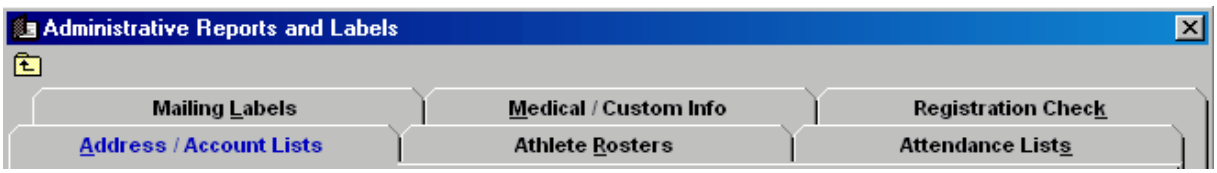
Save the export file to any folder you wish. If the report is a two column or three column report, it will be created as a single column report in Word. Therefore, after the export report is saved, open the exported file with Microsoft Word, click Format / Columns and change the columns from 1 to either 2 or 3 depending on what the original report had. In addition, the page numbering in the headers will be fixed at 1 on every page. You must edit the header and replace the page number with Word's page number macro. After these changes are made, you can make other cosmetic changes as needed and then re-save the document.

Important Note: MM uses Crystal Reports version 7.0 which exports Microsoft Word files in Word 2.0 format. This old Word format cannot be opened by Office Word 2003 SP3 and Office Word 2007 because these current Word versions by default have a registry setting that disables the opening of old Word formats. In order for you to re-enable Old Word File Formats, you must download the file named UnblockWord.reg from the Microsoft web site and Run the downloaded file. It will quickly change the Registry to allow the opening of old Word formats. The UnblockWord.reg can be downloaded from: http://download.microsoft.com/download/2/8/B/28B644CE-9A30-4D99-AFEF-830A4FB5B839/UnblockWord.reg

To read what Microsoft has to say about this issue, go to http://support.microsoft.com/default.aspx/kb/938810

Administrative Reports

SportsBM offers the following selections in Administrative Reports:



All Administrative Reports have the same filters listed at the bottom half of the screen. In the bottom half as seen below, you can filter the report by Groups or Subgroups, Gender, and Active or Inactive Status, and by Name, Age, or ID number. The top half of the screen changes with the various report selections.

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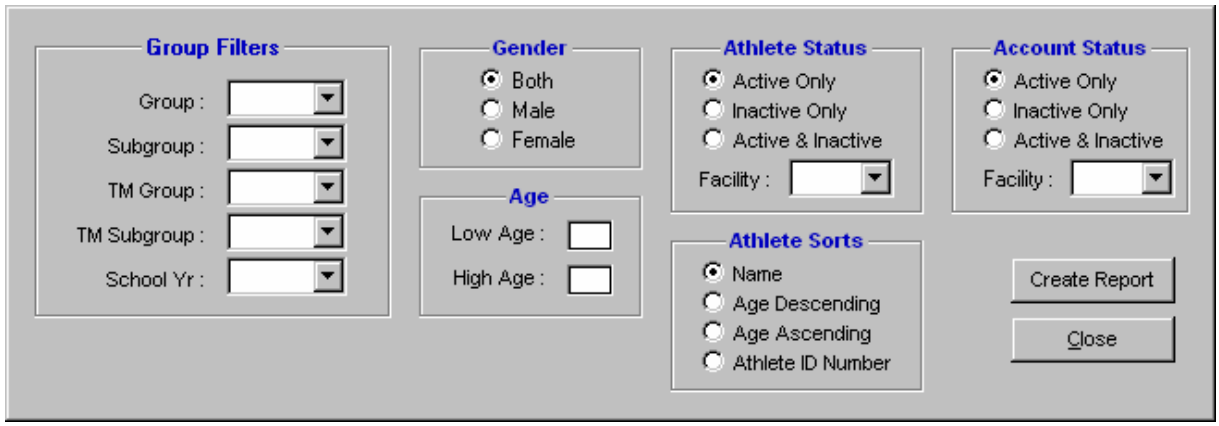


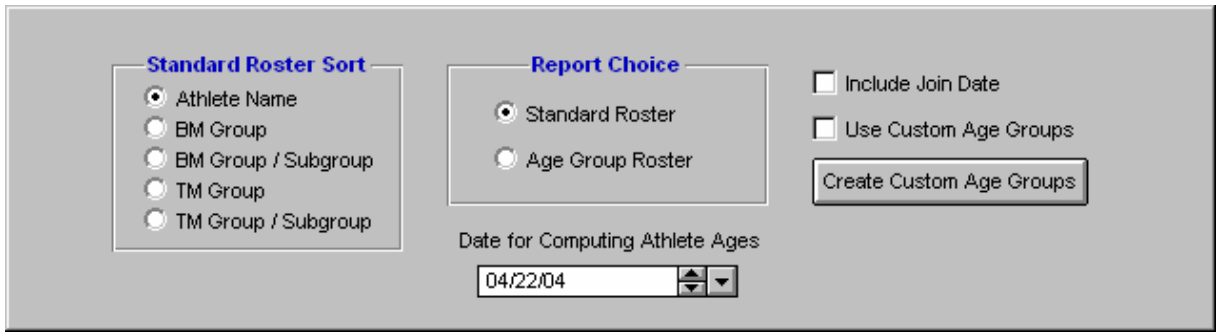
Address / Account Lists Report

Click on **Reports** from the Main Menu bar and then **Administrative** and **Address / Accounts Lists** to view the following Report menu screen. According to your **Style** selection, this report enables you to print by either Account/Family or by Athlete. You can choose Contact or Mailing Information, a Telephone List, an Account Number List, or an Email List. You also have the ability to exclude account numbers, phones, fax numbers, or e-mail addresses.

There are quite a few combinations of reports that are generated based on whether you choose For Account or For Athlete and what items you exclude.

Athlete Rosters Report

Click on **Reports** from the Main Menu bar and then **Administrative** and **Athlete Rosters** to view the following Report menu screen.



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Standard Roster Sort

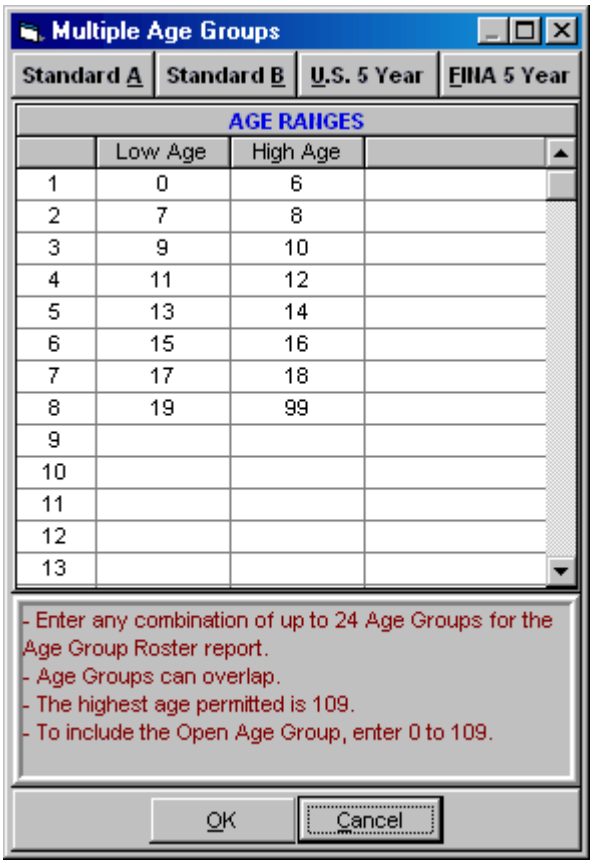
Choose to sort by Name or **SportsBM** Groups/Subgroups or TM Groups/Subgroups.

Report Choice

A **Standard Roster** lists the athletes alphabetically and includes gender, age, birth date, ID number, Group, School Year, and Join Date. The Join Date only shows if the Include Join Date check box is checked. The School Year only shows if the Show School Year check box is checked in Report Preferences.

An **Age Group Roster** lists athletes alphabetically by age group as selected when you click the **Create Custom Age Groups** and check the box **Use Custom Age Groups**. It contains the same information as the Standard Roster, but the athletes are sorted according to age groups.

Create Custom Age Groups - by clicking on this button, a screen appears to let you customize your report.



Date for Computing Athlete Ages

Either type in a date or use the drop down menu to enter the date for computing ages for the current report.

Attendance Lists Report

This report provides a **one week** (portrait), bi-weekly = **two week** (landscape), or **monthly** (landscape) attendance report for the athletes that were selected based on the Attendance Sort listed to the left. Check the boxes to include phones, 2 rows of boxes (for AM and PM practices), and to put groups on

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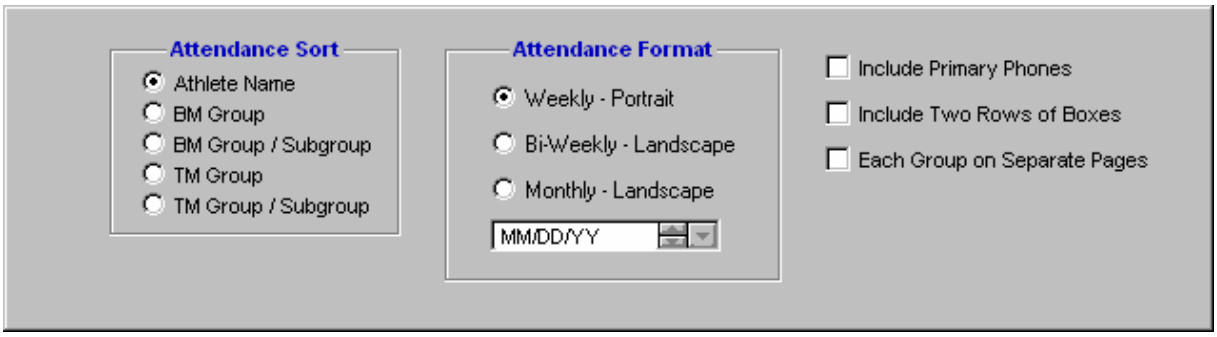
separate pages.



Mailing Labels Report

From the Main Menu, click on **Labels** or click on **Reports / Administrative / Mailing Labels**.

Click Here for information about the filters found at the bottom of the Administrative Reports.

Select the desired Label Type and select the Style. If you select Birthday, choose a Month/Day range such as 09/01 to 09/07 and **SportsBM** will create mailing labels for all athletes whose birthdays fall with the selected Month/Day range. Select Repeating if you wish to create Return Address Labels; type the address information in the **Repeating Address** blanks and select the **# of Sheets for Repeating Label**. Note that the label selection 2 x 10 is 20 labels per page and Avery #5161, and the label selection 3 x 10 is 30 labels per page and Avery #5160.

Medical / Custom Info Reports

From the Main Menu, click on **Reports / Administrative / Medical/Custom Info**.

To format this report, click either **Medical Information** or **Custom Information**. To further design/sort the report, use the filters found at the bottom of all Administrative Reports.

The Medical Information Report

- Athlete Name, Age, Birth Date, Group, School Year
- Emergency Contact, Emergency Phone Number
- Doctor, Doctor Phone
- Medical Condition, Medication

The Custom Information Report

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- Athlete Name, Age, Group, School Year
- Custom Fields and their data

To format this report, click the radio button for either **Medical Information** or **Custom Information**. To further design/sort the report, use the filters. Click Here for information about the filters found at the bottom of the Administrative Reports.

Registration Check Report

From the Main Menu, click on **Reports / Administrative / Registration Check**.

This report verifies the athletes against the LSC's USA Swimming Registration file. A swim organization may want to set up a process to periodically register athletes. This registration may take place at the team level and then each team would export the registration information for the athletes to a central Registration Database. The particular Athlete registration setup, report, and export in **SportsBM** is specifically designed to accommodate USA Swimming's National Registration process.

This report is designed to check the athletes in your Database/Team/Group against a standard semi-colon delimited Registration File. This is a great way to check that your athletes have the correct registration ID, name spelling, and birth date. This report and the accompanying Browser currently support the USA Swimming Registration .RE1 export file.

You can click on the **Browse Reg File** button to view the registration information contained in the .RE1 Registration File that you selected for the Report.

Account Financial Reports

SportsBM offers the following selections in Account Financials Reports.

Account Balances Report

From the Main Menu, click on **Reports / Account Financials / Account Balances**.

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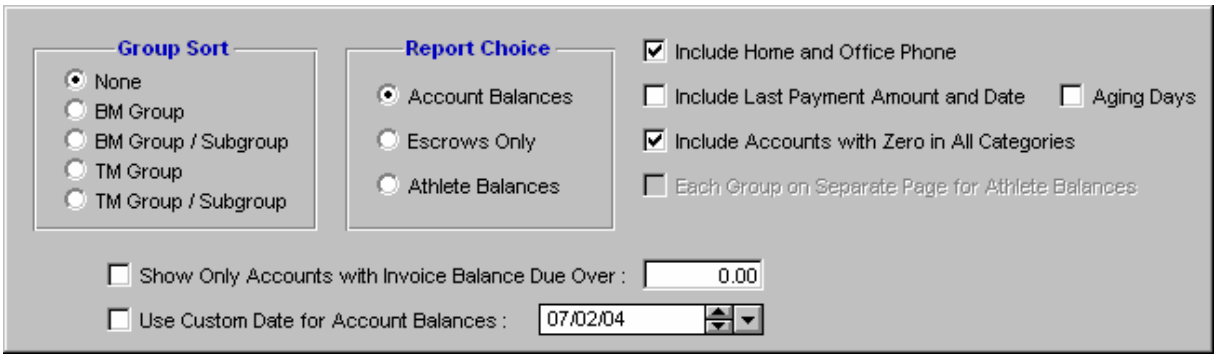

Click on the desired radio buttons for Group Sort & Report Choice.

NOTE: The Account Balances Report can also be used to show **aging of balances** due. By checking the box "Include Last Payment Amount and Date", the last two columns show the last payment amount and the date. You thus get a report that shows problem accounts.

Account Balances Options

- Include Home and Office Phone
- Include Last Payment Amount and Date
- Include Accounts with Zero in All Categories
- Show Only Accounts with Invoice Balance Due Over:_____ (you fill in amount)
- Use Custom Date for Account Balances will provide balances at any date in time, but these balances will only be accurate if the Day 1 start-up balance is correctly entered.

Escrows Only Options

- Include Home and Office Phone
- Include Last Payment Amount and Date
- Use Custom Date for Account Balances will provide escrow balances at any date in time, but these balances will only be accurate if the Day 1 start-up balance is correctly entered.

You can filter the report by Active Accounts only, Inactive Only, or by Facility.

Transactions Summaries Report

There will frequently be times where it would be nice to have a list of all charges posted for dues during the past month or the past two weeks just to check that everyone was charged. The transaction summary report serves this purpose. This report is especially useful to check your work after posting a long list of charges. It will also give you a total amount charged which you can check against the amount you paid.

From the Main Menu, click on **Reports / Account Financials / Transactions Summaries**.

The **Transactions Summaries Report** offers numerous choices and filters to enable you to gather exactly the data you need.

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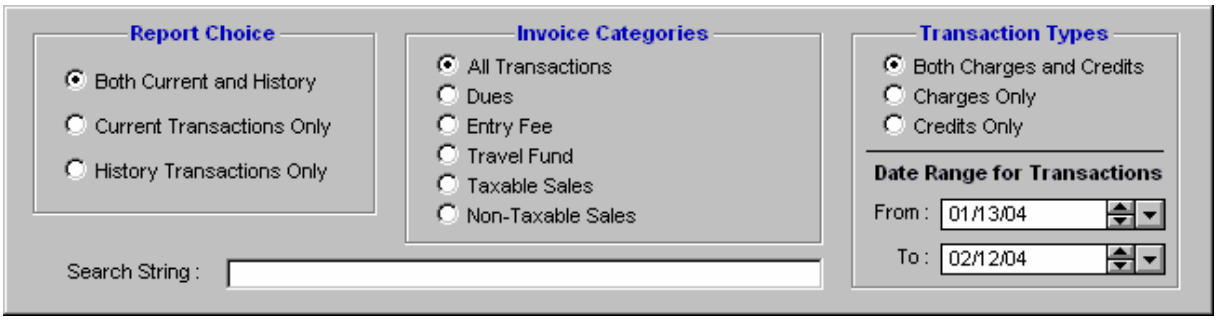


Click on the desired radio button for **Report Choices**, **Invoice Categories**, and **Transaction Types**.

Date Range for Transactions

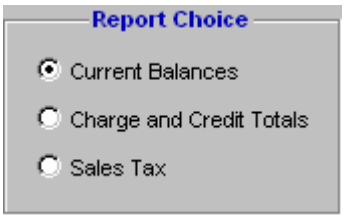
Type in dates or use the drop down menus to select "From" and "To" date ranges.
This feature is very handy for finding particular types of transactions, such as all those that have "Reverse Charges" in them.

Sorting Options as seen below are list at the bottom of the screen:

Financial Summaries Report

From the Main Menu, click on **Reports / Account Financials /Financial Summaries**.

There are 3 types of Financial Summaries; click on the radio button of your choice.



Current Balances Report

This report lists the amount due from each facility, in each invoice category, and total escrow amounts (shown within the parentheses), and the total balances for each category.

Charge and Credit Totals

This report lists each facility and the charges and credits for each of the 5 invoice categories. Balance Totals appear below each Charge and Credit column.

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Charges And Credits - 4/2/2003 to 5/2/2003

Facility	Dues		Entry Fee		Travel Fund		Taxable Sales		Non-Taxable Sales		Total	
	Charges	Credits	Charges	Credits	Charges	Credits	Charges	Credits	Charges	Credits	Charges	Credits
Andrews Facility	775.00	185.00	22.00	0.00	0.00	120.00	668.00	450.00	20.00	0.00	1,485.00	755.00
Capitol Aquatic Center	225.00	0.00	475.00	0.00	335.00	0.00	36.00	0.00	45.00	0.00	1,116.00	0.00
Dadeland Rec Center	205.00	10.00	55.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	260.00	10.00
	$1,205.00	**$195.00**	**$552.00**	**$0.00**	**$335.00**	**$120.00**	**$704.00**	**$450.00**	**$65.00**	**$0.00**	**$2,861.00**	**$765.00**

Sales Tax

If you are recording taxable sales with **SportsBM**, then this report will be very useful. It is designed to give you all the information you need to fill out the monthly sales tax report requested by your state. For any given month, the sales tax report includes the sum of all charges and credits posted to Taxable Sales and Non-Taxable Sales. Your can have the report calculate any month of the year. Results can be either shown on the screen or printed out.

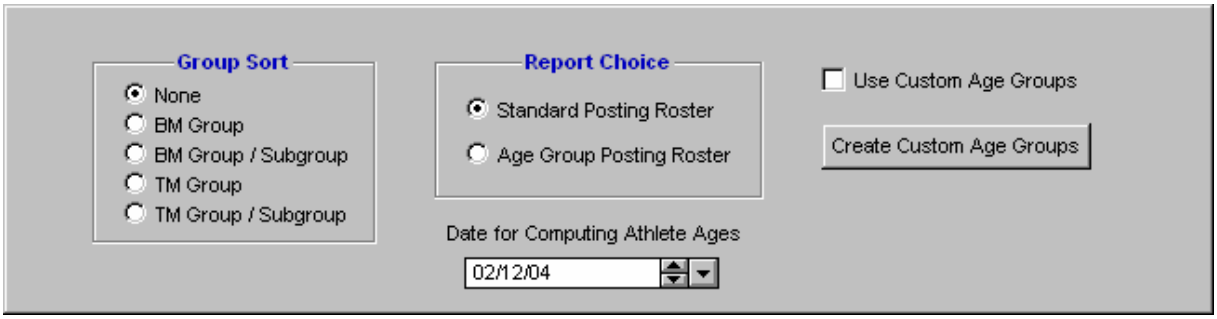
Sales Tax Collected - 4/2/2003 to 5/2/2003

Facility	Taxable Sales			Non-Taxable Sales	
	Charges	Credits	Sales Tax	Charges	Credits
Andrews Facility	$668.00	$450.00	$46.61	$20.00	$0.00
Capitol Aquatic Center	$36.00	$0.00	$2.52	$45.00	$0.00
Dadeland Rec Center	$0.00	$0.00	$0.00	$0.00	$0.00
	$704.00	**$450.00**	**$49.13**	**$65.00**	**$0.00**

NOTE: This report assumes that the amounts posted for each taxable sale include the sales tax amount. In addition, the sales tax is calculated from the amount charged, not the amount collected.

Athlete Posting Lists Report

From the Main Menu, click on **Reports / Account Financials / Athlete Posting Lists**.



Use the radio buttons to Sort by any Group or None. Use the drop down to enter an Age Computing Date.

Standard Posting Roster

This form serves a worksheet for writing down information to be entered later into **SportsBM**. The Standard Posting Roster alphabetically lists the Account/Family #, a blank line for writing info, Athlete name, Gender, Age, Birthrate, Group, and School Year.

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Posting List - All Facilities

Acct#	Amount	Athlete	Sex	Age	BirthDate	Group	Yr
316	_____	Adams, Roscoe T	M	11	11/14/1991		
458	_____	Albert, Janet	F	-	4/30/2003		
458	_____	Albert, Kathy	F	14	12/21/1988	AG1	
220	_____	Bish, Aaron J	M	12	9/12/1990	AGP	
457	_____	Borggreen,Jr, Tim	M	18	4/10/1985	HSP	
368	_____	Brady, Emily R	F	15	10/13/1987	OAG	
350	_____	Brady, Shane	M	9	8/9/1993	MIN	
299	_____	Brock-Jones, Lauren R	F	15	11/15/1987	Jx1	
420	_____	Burns, Rusty	M	17	2/2/1986		JR
363	_____	Caison, William R	M	16	7/27/1986	OAG	

Age Group Posting Roster

This form serves a worksheet for writing down information to be entered later into **SportsBM**. The Age Group Posting Roster lists by the **Custom Age Group** selected in alphabetical order the Account/Family #, a blank line for writing info, Athlete name, Gender, Age, Birth date, Group, and School Year. It includes the total athlete count per age group.

Posting List - All Facilities

Acct#	Amount	Athlete	Sex	Age	BirthDate	Group	Yr
6 & Under							
458	_____	Albert, Janet	F	-	4/30/2003		
429	_____	Cheripka, Michael R	M	4	6/12/1998	MIN	
328	_____	Faruk, Sadiyah	F	6	5/21/1996	MIN	
419	_____	Hooker, John R	M	6	1/19/1997	MIN	
432	_____	Hughes, Jamie P	M	6	10/11/1996	MIN	
467	_____	Krupp, Emily C	F	6	1/13/1997	Jx1	
447	_____	Robinson, Jordan E	F	6	5/21/1996	MIN	
453	_____	Zimmerman, Christoph C	M	4	4/12/1999	MIN	
453	_____	Zimmerman, Juliana C	F	5	12/14/1997	MIN	
	6 & Under Athlete Count:	**9**					
7-8							
441	_____	Kim, Christopher A	M	7	1/17/1996	Jx2	
440	_____	Nicoletti, Tyler E	M	8	6/7/1994	Jx1	
444	_____	Smith, Caroline R	F	8	2/16/1995	Tr2	
434	_____	Solomon, Cydney J	F	7	12/18/1995	MIN	
	7-8 Athlete Count:	**4**					

Athlete Registration Report

This report only applies to swimming. A swim organization may want to set up a process to periodically register athletes. This registration may take place at the team level and then each team would export the registration information for the athletes to a central Registration Database. The particular Athlete registration setup, report, and export in **SportsBM** are specifically designed to accommodate **USA**

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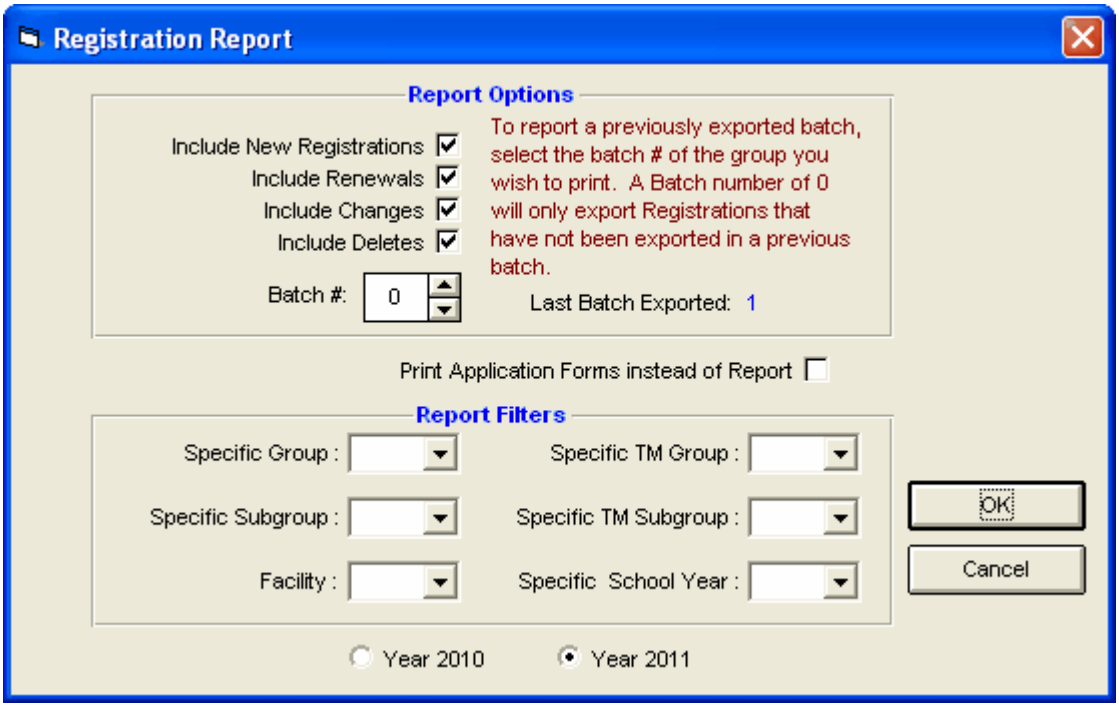
Swimming's National Registration process. Information entered on the Registration Preferences screen will appear on the Individual Athlete Registration Application. To create the application, go to the **Main Menu / Reports / Athlete Registration**, and then check the box: **Print Application Forms instead of Report**.



You can include one or more of the registration classifications and you can filter this report by Group, Subgroup, Facility, TM Group, TM Subgroup, or School Year. Enter the Batch Number associated with this particular Registration Report or enter "0" to include all swimmers that have not been exported.

Click on the **OK** button, and SportsBM will provide a report preview of the Registration Report.

Note: Only Active athletes are included in the report. If a particular athlete was exported and has say a Batch number of 3, a report on batch 3 will not include this athlete if the athlete has been changed to Inactive.

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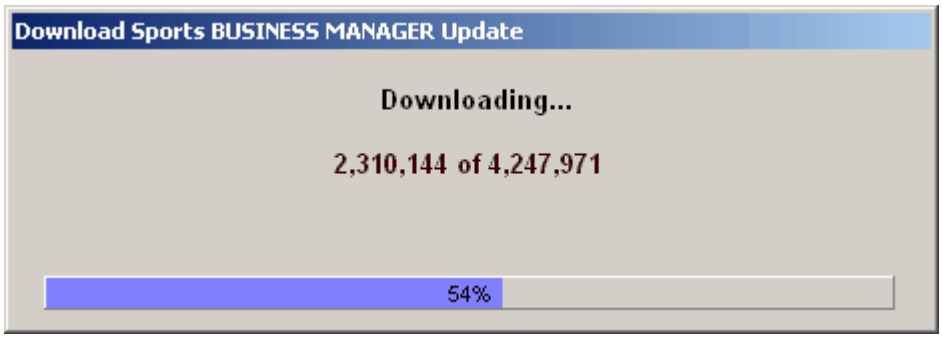
Check For Updates

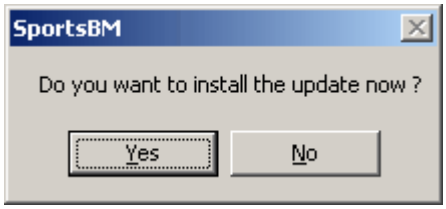
Periodically, HY-TEK provides **Service Pack Updates** that include corrections to reported problems. The **Check for Updates** feature connects to the HY-TEK web site to determine if there is a newer update available.

In order to download and install the current SportsBM Service Pack Update, make sure you are connected to the Internet and then start SportsBM and click on **Check for Updates** from the Main Menu Bar.

SportsBM will verify the Internet connection and then check the MM Update site to see if you are running the current release. If you are already running the most current SportsBM release, SportsBM will tell you just that and you click OK and continue. If you are not running the current SportsBM release, SportsBM will download the latest update for you and show a download progress bar.



After the download has been completed, SportsBM will ask if you want to install it now.



If you click **Yes** to the above message, SportsBM will install the update, will close SportsBM, and then will restart SportsBM for you. After SportsBM has restarted, click on **Help / Release Notes** to check out the new features that have been included in the update.

If you click on the **No** button above, nothing will be installed and you can try the **Check for Updates** again later.

Since the update file has already been downloaded to your computer at this point, you can install the update by clicking on **File / Install Update** and you will get the message shown below. The update file is named **SportsBMUpdate.zip** and is stored in the Download folder under your installation directory - *probably c:\hy-sport\SportsBM\Download*. Click No in the message shown below will then allow you to open the SportsBMUpdate.zip file which will then install the update the same way Check for Updates would install the update.

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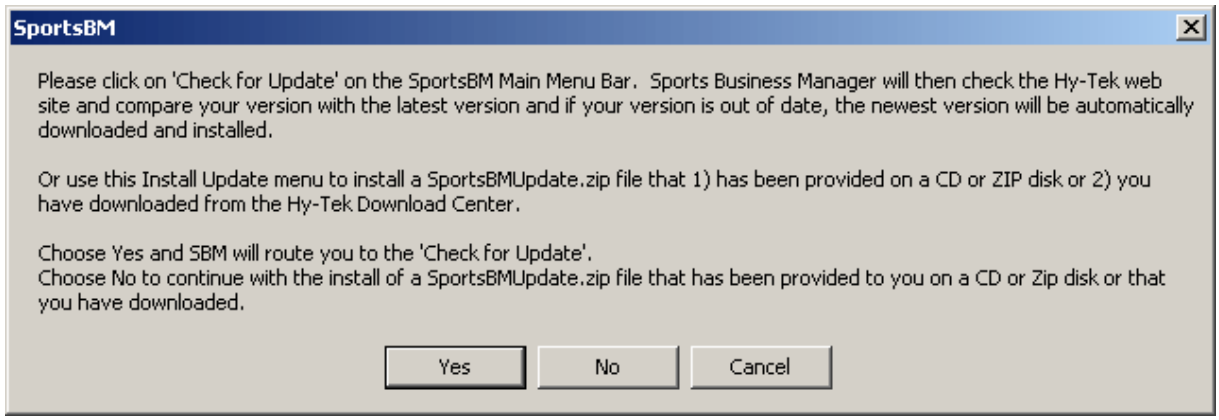

NOTE: Installing an update will not harm your database.

NOTE: If you have Firewall software on the computer you are using to **Check for Updates**, you may have to turn the Firewall software off until you have completed the Check for Updates procedure and then turn the Firewall software back on. If you are unable to get SportsBM to connect to the HY-TEK web site, you can update to the latest version by ordering a **Product Replacement CD**, **Web Delivery**, or both from the HY-TEK Online Store.

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Pro Option

Sports BUSINESS MANAGER with the **Pro** Option includes the standard **Sports BUSINESS MANAGER** product with the following added feature:

- **Network Option** in which two or more computers each running MM can share a common Database. Click Here for a description of the Software and Hardware necessary to properly use this feature. Click Here to see how to set up the Logon and Administration functions that support this feature.

The **Sports BUSINESS MANAGER** with the **Pro** Option logo is displayed right on the Main Menu if the feature had been included with your particular product release.

Setup a Network

Pro is an **Option** and is not included in the Start-up version of Sports BUSINESS MANAGER, but may be purchased as an added feature and then becomes an integrated part of the program.

SportsBM Pro supports the standard Windows **peer-to-peer network** configuration. In this type of network configuration, each computer is connected to a central device called a "hub". The shared SportsBM Database is loaded on one of the computers so that any of the other computers can access it directly.

For example, suppose we have 4 computers connected to a hub. For the purposes of this discussion, let's name these computers A, B, C, and D and let's load the SportsBM Database on Computer A.

- The HY-TEK SportsBM product software would be installed on all 4 computers on the hard drive C.
- *The folder on the A computer where the database is located must be given full read/write permissions.* To give a folder full read/write permission, use My Computer or Windows Explorer to right click on the database folder (usually c:\sportsbmdata) and then click Sharing. In the Sharing Menu, check the box to **Share this folder on the network** and check the box that says **Allow network users to change my files**. You may also give a **Share Name** to the folder which defaults to the actual folder name. Rather than just share the database folder, you can also share the entire C Drive by right clicking on Local Disk (C:).

Hardware Required

Example of network component vendors are 3Com, Kingston, and D-Link. Internet sites that you can order from are **www.buy.com** and **www.pcconnection.com**.

- 100 Base TX Hub. The cost for a 5 Port Hub would be about $49.00.
- Most desktop computers come with a network card built in. But if yours does not, you can purchase a 10/100 Base computer network card for each desktop computer - Cost about $25.00.
- Most notebook computers come with a network card built in. But if yours does not, you can purchase a 10/100 PCMCIA Card for each notebook computer - Cost about $49.00.
- 10/100 Base TX cable from each computer to the hub. The cables will connect to an RJ-45 connector in the hub and into each computer's network card. The cost is about $10.00 for 25 feet of cable. Or, you can use a **wireless** setup with the appropriate Network cards and hub.

So for a 4 computer system network, the **hardware cost would be under $200.00**.

Software Required

The peer-to-peer network software is included with your Windows 98, 2000, XP, or NT Operating

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System. Please follow the appropriate instructions for setting up your particular network system as well as the software drivers included with the network card installed on each computer.

Continuing with our example, let's assume that the hard drive on Computer A is the one that is shared. On Computer A, you would start **SportsBM** and click on **File** / **Open**, select your local Drive C, and select the database which is probably in c:\sportsbmdata. Now the SportsBM Log-in window appears and you select one of the nine user levels such as Administrator and click Multi-User at the bottom. When you start up SportsBM on Computer B, click on **File** / **Open**, select the mapped drive from computer A (let's assume computer B sees computer A's hard drive as the F Drive) and open the database found in f:\sportsbmdata. The Log-in screen now appears and it shows you that the Admin user is logged-on. You select a user level such as Staff 1 and click Ok. Now computers A and B are accessing the **SAME INFORMATION** contained on the hard drive on Computer A. Do the same for computers C and D.

Please note that under the Windows peer-to-peer network configuration, devices like **Printers** may also be shared.

MM Pro provides a complete suite of **Network Administration** features. Please click Here to find out how to setup the Logon/User ID choices, optional passwords, and permission levels for your system.

Logon the Network

If you are using **Sports BUSINESS MANAGER** with the **Pro** option, whenever you Open a Database, **SportsBM Pro** will prompt you to logon with one of the User Names shown below. There are three levels of permissions as shown, so pick the User Name that applies to your needs.

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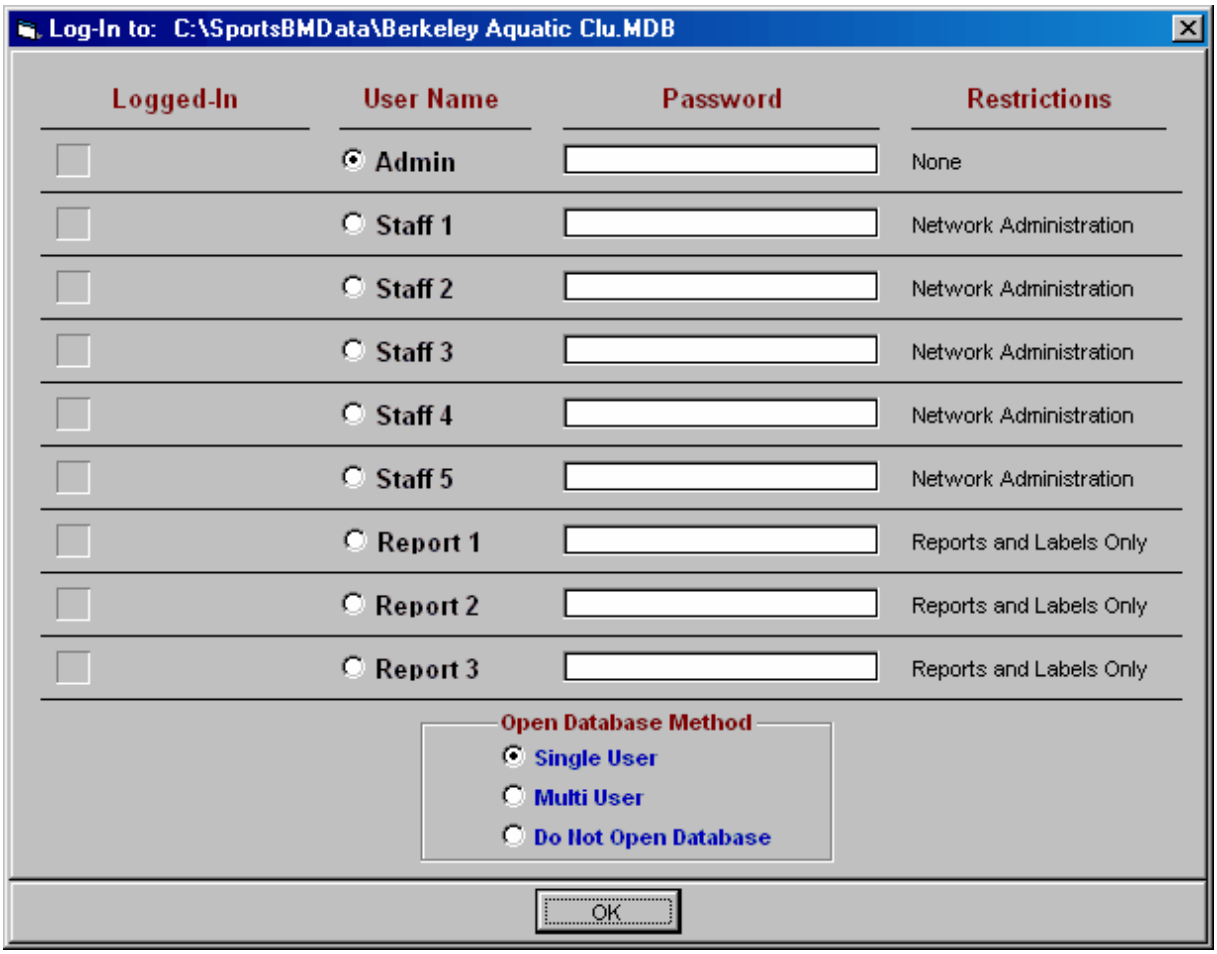

Level	User Name	Permissions
1	Administrator	No restrictions at all.
2	Staff 1	This level can do everything except Network Administration and Single User Mode functions.
	Staff 2	
	Staff 3	
	Staff 4	
	Staff 5	
3	Report 1	Print Reports/Labels ONLY
	Report 2	
	Report 3	

Please note that the logon applies to a **specific Database**.

In order to logon, you must first pick from the above list of User Names and then enter an optional password for that User Name. Only the **Administrator** User Name has the ability to assign a **Password** to one or more of the User Names - please click Here to find out how to set up passwords. . Please note that an Administrator may set up a set of passwords for one Database and no passwords for another Database - the **set of User Name passwords are associated with each Database, NOT with the global system**. Passwords consists of from 6 to 16 numbers and letters and can be left blank if no password is desired. When you logon, **SportsBM** will display all nine User Names and indicate which ones are available to use (that is, currently NOT logged on).

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If you logon as **Administrator**, you have the option to Open the Database in **Single User Mode** or **Multi-User Mode**. Click Here for more information about logging on as **Administrator** for Network Administration. If you logon as any of the other 8 User Names, the Database will automatically be opened in Multi-User mode - that is, more than one User can access the database at one time.

The only way to **log off** and free up your User Name is to exit from **SportsBM**.

Setup Network Administration

If you are using **Sports BUSINESS MANAGER** with the **Pro** option, you can logon as the **Administrator** and optionally set up passwords for all three Levels of access as shown below. **Only the User Name of Administrator** can perform Network Administration and **setup or change the passwords** for the Database that is currently opened.

Level	User Name	Permissions
1	Administrator	No restrictions at all.
2	Staff 1	This level can do everything except Network Administration and Single User Mode functions.
	Staff 2	This level can do everything except Network Administration and Single User Mode functions.
	Staff 3	This level can do everything except Network Administration and Single User Mode functions.
	Staff 4	This level can do everything except Network Administration and Single User Mode functions.
	Staff 5	This level can do everything except Network Administration and Single User Mode functions.
3	Report 1	Print Reports/Labels ONLY
	Report 2	Print Reports/Labels ONLY
	Report 3	Print Reports/Labels ONLY

After you have logged on as the **Administrator**, click on **File** / **Network Administration** and **SportsBM** will display the nine User Names as shown above and indicate what User Names are currently logged on and if so, what computer name is associated with that logon. As the Administrator, you can optionally assign a password to one or more of the nine User Names. Please note that the **set of User Name passwords are associated with each Database, NOT with the global system**. In other words, you can assign passwords for all User Names for Database A but then assign no passwords for access to Database B. Passwords can consists of from 6 to 16 numbers and letters and can be left blank if no password is desired.

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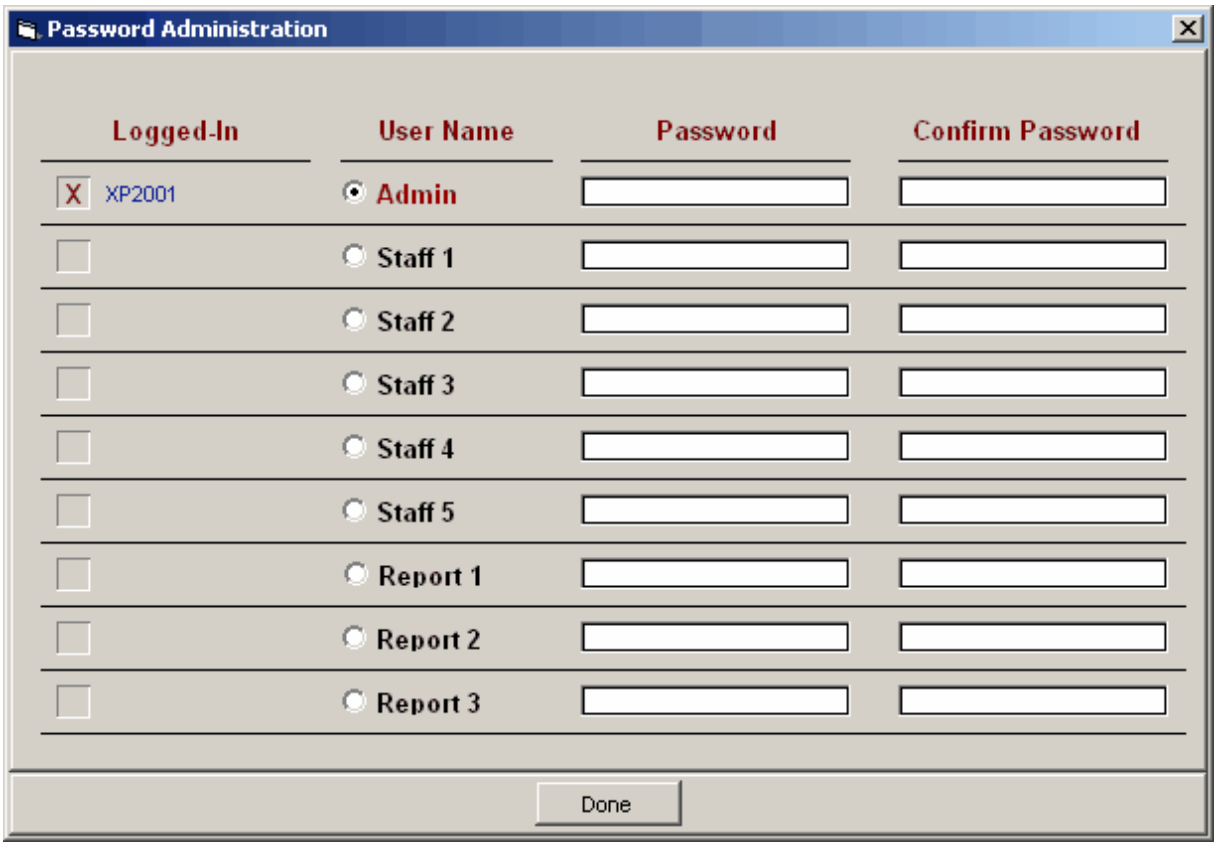

When you logon as **Administrator**, you have the option to **Open the Database** in **Single User Mode** or **Multi-User Mode**. You also have the option to switch between Single and Multi-User Mode. To switch from one mode to the other, just click on **File** / **Switch to Single/Multi-User Mode**. If you try to switch to Single User Mode and there is already a user logged on, **SportsBM** will not let you switch until all other Users are logged off. **Single User Mode** prevents any new users from logging on to the system as long as the Administrator is logged on. There are two reasons the Administrator might logon or switch to Single User Mode:

1. To prevent others from logging on while he/she completes changes that are needed without interruption.
2. To perform any of the Single Mode functions as follows:
   - Restore a Database
   - Repair a Database
   - Import
   - Delete Accounts and Athletes
   - Install Update
   - Use the **SportsBM** Web Browser

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Hy-Tek Products

Swimming

TEAM MANAGER for Swimming

TEAM MANAGER ***for Swimming*** is designed to automate the clerical tasks associated with managing and coaching a swim team, including workout management. **TM** can be used by one team, a swim league, or even a USA Swimming LSC. Here are a few of the reports and functions that **TM** can perform:

- Roster Report (Many formats)
- Record Keeping (e.g. tracking pool, meet and team records)
- Time Standards (Tagging swimmers= times with the appropriate time standards - e.g. AAA, AA, A, BB, B
- Top Times Report (e.g. Top 5 for 50 Free since 4/12/95)
- Mailing Labels and Deck Labels/Cards (for your next meet)
- Ribbon Labels (based on the place finish or improvement)
- USA Swimming Registration
- Graph Swimmer's Performance (over the season)
- Conversion from Meters to Yards and Yards to Meters
- Recruiting Reports & NISCA Power Points
- Hot Sync Swimmer information and times to and from **Pro SWIMMER** ***for Palm OS***®
- Set up and manage workouts and training

When you return from a meet, enter your team's results directly into your TM II database using your keyboard or by importing a Meet Result diskette or e-mail file. You do not have to enter your swimmers' names – **TM** will display all the eligible swimmers for a particular event. Just select a swimmer and enter his/her time.

Before an upcoming meet, use **TM'**s "point and shoot" screen to declare who is swimming what events. Print a "Meet Entry" report and then click on File then Export to put those entries onto a diskette to send to the host team.

WORKOUT MANAGER Features

WORKOUT MANAGER is a coach's tool optional feature that has been integrated into TEAM MANAGER so that, when creating workouts and predicting training paces, it can utilize the already available athlete rosters and best times without having to move data back and forth between multiple products. Created with the busy coach in mind, WORKOUT MANAGER is intuitive and time saving with its easy to use menus and windows navigation features. Most coaches are responsible for 8 to 24 swimmers in anywhere from 2 to 4 lanes in each session. Therefore it is imperative that the coach be able to create workouts for each lane quickly and easily. WORKOUT MANAGER permits multiple workout windows to be open at the same time where you can cut and paste between workouts and use designs from previous workouts. While creating a workout, a running time line, total yardage and the total stress level is shown to enable you to get the maximum out of a workout. In addition, you can see the amount of each stroke and the amount of each energy system being designed in. When you assign a particular workout to a group/subgroup, all swimmers in that group have their attendance and yardage statistics automatically updated.

With the Training option, you can record any kind of test set and you can predict training paces from recorded T-30 test sets. The Training option also has been designed to be able to upload statistics on your swimmers to Web based training programs and then be able to download workouts designed by those web based program. With the Pace Clock option, you can upload workouts into various pace

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clocks that are available in the market place. This is a great time saving feature since it is time consuming to manually load data into these pace clocks. See more about the Pace Clock option in the WORKOUT MANAGER options section.

TM and WORKOUT MANAGER is the latest in swim team automation technology! Check it out at **www.hy-tekltd.com/swim/TMII.**

MEET MANAGER for Swimming

MEET MANAGER *for Swimming* is the very finest meet management software from HY-TEK designed to help you run any kind of swim meet - Age Group, College, High School, Masters, YMCA, Rec/Summer League, Dual or Championship format.

One person should be able to perform the bulk of the administrative tasks of running the meet, including entering events, teams, and athlete entries; producing the meet program using a wide range of report layout options; and entering and producing various result reports.

To make your task even easier, **MEET MANAGER** supports the import of entries from diskette or from the Internet before the meet, as well as the Import of results with splits from your Timing Console using HY-TEK's Interface software. The **INTERFACE** option is special software that is designed to communicate with many different Timing Consoles including Colorado, Daktronics, Omega, IST, and Kyrotech.

The **Pro** option, with the **Multi-User Network and Real-Time Results Export to the Web** features, is designed to run large meets using several computers sharing one common Database. Set up 2 or more computers so that the Clerk of Course does scratches and seeding on one computer while results and ribbon labels are printed on a second computer and the meet is being run from another computer - all sharing the same common Database!

MM 2.0 is the latest in swim team automation technology! Check out the MM **Virtual Tour** at **www.hy-tekltd.com.**

TEAM MANAGER Online

TEAM MANAGER *Online* (TMO) is HY-TEK's Internet web based product that displays performance information about your team's athletes in an easy to view format.. Export your team's best times, roster, records, and meet results to the web so parents and athletes can view, print, sort, graph, and filter information about your school/team's performance. From **TEAM MANAGER**, you can quickly and easily upload your team data directly to the TMO web database. Check it out at **www.hy-tekltd.com/swim/TMOnline.**

Personal SWIM MANAGER Reloaded

HY-TEK's ***Personal* SWIM MANAGER - Reloaded** (PSM-R) has been developed to help the Athlete track his/her performance, scheduling, and administrative information. Here is a short summary of product highlights:

- Software for the entire Family (up to 4 swimmers).
- Package includes BOTH **PSM-R *for Windows*** and **PSM-R Mobile *for Palm OS.***
- Hot Sync information back and forth between your Windows desktop and your Palm OS device
- Import Meet Results from **TEAM MANAGER Online** and **MEET MANAGER**.
- Export Entries to **TEAM MANAGER**.
- Interactive **Calendar** to help with Scheduling of Team Meetings, Workouts, Swim Meets, Practices, etc. rack Swim Performances and splits with Meet filters, Goal Setting, and Reports.

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- Graph Swim Times and Health attributes including Weight, Heart Rate, Wellness, & Sleep)
- Use PSM-R as your own Personal Web Browser with Your "Favorite Sites"and "E-Mail".
- Import Workouts from WORKOUT MANAGER.

Ask about HY-TEK's Team FUND RAISER Opportunity when purchasing 10 or more PSM-R products for your team!

Check out PSM-R at **www.hy-tekltd.com/psm**

Pro SWIMMER for Palm OS

HY-TEK's **Pro SWIMMER** ***for Palm OS*** has been developed for the swim team coach to provide a portable way of tracking and reviewing both administrative and performance information. **Pro SWIMMER** runs on the Palm Operating System version 3.5 or later and requires a 2MB Palm Pilot or compatible system.

Pro SWIMMER offers:

- Medical & Personal Swimmer Data
- E-Mail for every Swimmer
- Performance History
- Entry List for the Meet
- Best Times by Stroke/Distance
- Hand Timer for up to 3 swimmers at once (including splits) and then Hot Sync results back to TEAM MANAGER

Pro SWIMMER is designed to display and sort administrative and performance information for a swim team. Administrative information about your club and every swimmer's best time in every event that they have swum can be downloaded to your **Pro SWIMMER** from HY-TEK's **TEAM MANAGER II** using the Palm's Hot Sync feature. Meet Entries can also be downloaded to **Pro SWIMMER** enabling the coach to review meet entries on the deck for any event or for any swimmer.

Check it out at **www.hy-tekltd.com/swim/palmsw** and then download a **FREE Trial Copy**.

Order ***Pro*** **SWIMMER** for only $69.95.

Track & Field

TEAM MANAGER for Track & Field

TEAM MANAGER ***for Track & Field*** is designed to help you manage your team. As you know, keeping track of your athlete's performances from every meet becomes a statistics nightmare. **TEAM MANAGER** can greatly lessen this headache and at the same time put the statistics to work for you. Not only that, but **TEAM MANAGER** is also designed to be simple to use! No prior computer experience is needed! The software is menu driven, which means that all information required to perform a particular task is on the computer screen in front of you.

Major Features

- Store meet results from hundreds of meets.
- Export entries for HY-TEK's **MEET MANAGER** *for Windows* to import and import results from HY-TEK's **MEET MANAGER**.
- Generate performance graphs.
- Maintain team rosters, attendance lists, mailing and e-mail lists

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- List top performance reports in many ways.
- Maintain your team's event records and update them automatically.
- Handy journal for notes, newsletters, and newspaper articles.
- Produce mailing labels, award labels, competitor labels, and event tag labels articles.
- Generate season top point scorer lists.
- Record splits for all events.
- Export any report to Excel, Word, HTML (web), comma delimited, etc.
- Export Athlete administrative and performance information to HY-TEK's **Pro ATHLETE** ***for Palm OS***.

Check it out on the web and download a FREE copy to evaluate at **www.hy-tekltd.com/track/wintm/index.html**.

MEET MANAGER for Track & Field

HY-TEK's **MEET MANAGER** ***for Track & Field*** **2.0** (**TFMM**) is the very finest meet management software from HY-TEK designed to help you run any kind of track & field meet - Age Group, College, High School, Masters, YMCA, Cross Country, Road Race, or Championship format.

One person should be able to perform the bulk of the administrative tasks of running the meet, including entering events, teams, and athlete entries; producing the meet program using a wide range of report layout options; and entering and producing various result reports.

To make your task even easier, **MEET MANAGER** supports the import of entries from diskette or from the Internet before the meet, as well as the Import of results with splits from your Photo Finish Interface, Scoreboard Interface, FieldLynx Interface and Button Finish Interface using HY-TEK's Interface software. The **INTERFACE** option is special software that is designed to communicate with many different Interfaces including FinishLynx, Omega, MacFinish, Daktronics, Fairtron, FieldLynx, Time Tech 8, Time Machine, Chronomix 737, and Nielsen-Kellerman Interval Watch.

MEET MANAGER quickly and easily exchanges financial data with **SportsBM.**

The **Pro** option, with the **Multi-User Network and Real-Time Results Export to the Web** features, is designed to run large meets using several computers sharing one common Database. Set up 2 or more computers so that the Clerk of Course does scratches and seeding on one computer while results and ribbon labels are printed on a second computer and the meet is being run from another computer - all sharing the same common Database!

TFMM is the latest in Track & Field team automation technology! Check out the TFWin-MM's **Virtual Tour** at **www.hy-tekltd.com.**

TEAM MANAGER Online

T&F TEAM MANAGER ***Online*** (TMO) is HY-TEK's Internet web based product that displays performance information about your team's athletes in an easy to view format.. Export your team's best marks, roster, records, and meet results to the web so parents and athletes can view, print, sort, graph, and filter information about your school/team's performance. From **TEAM MANAGER**, you can quickly and easily upload your team data directly to the TMO web database. Check it out at **www.hy-tekltd.com/track/TMOnline.**

Pro ATHLETE for Palm OS

HY-TEK's **Pro ATHLETE** ***for Palm OS*** software has been developed for the Track & Field club/school/team to provide a portable way of tracking and reviewing both administrative and performance information. **Pro ATHLETE** runs on the Palm Operating System version 3.5 or later and

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requires a 2MB Palm Pilot or compatible system.

- Medical & Personal Athlete Data
- E-Mail for every Athlete
- Performance History
- Entry List for the Meet
- Best Times by Event/Distance

Pro ATHLETE is designed to display and sort administrative and performance information for any T&F team. Administrative information about your club/school and every athlete's best time/mark in every event can be downloaded to your **Pro ATHLETE** from HY-TEK's **TEAM MANAGER** ***for Windows*** using the Palm's Hot Sync feature. Meet Entries can also be downloaded to **Pro ATHLETE** enabling the coach to review meet entries at the meet for any event or for any athlete. Then y0u can use Pro ATHLETE's **hand timer** to record your track and field times/marks and hot sync those meet results back to your TEAM MANAGER database!

Check it out at **www.hy-tekltd.com/track/palmathlete**

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Sales Office

You have a number of options for contacting the HY-TEK Sales Office either to order new products, new options for your SportsBM software, to order a replacement CD, or to order Web Delivery of the MM software.

Web Site Shop Online

Visit our Web Site at **www.hy-tekltd.com** and click on the **Shop Online** Button! Simply fill in the required fields and submit your order. You will receive an e-mail back as confirmation of receipt of your order.

Telephone

Call the Sales Office Toll Free at **866.456.5111** and speak to a Sales Associate from 9:00 AM to 5:00 PM Eastern Time Monday through Friday (except holidays).

E-Mail

E-mail your order to our Sales office at **sales@hy-tekltd.com.**

Fax

Fax your order to us Toll Free at **866.471.7847** using the HY-TEK Product Order Form.

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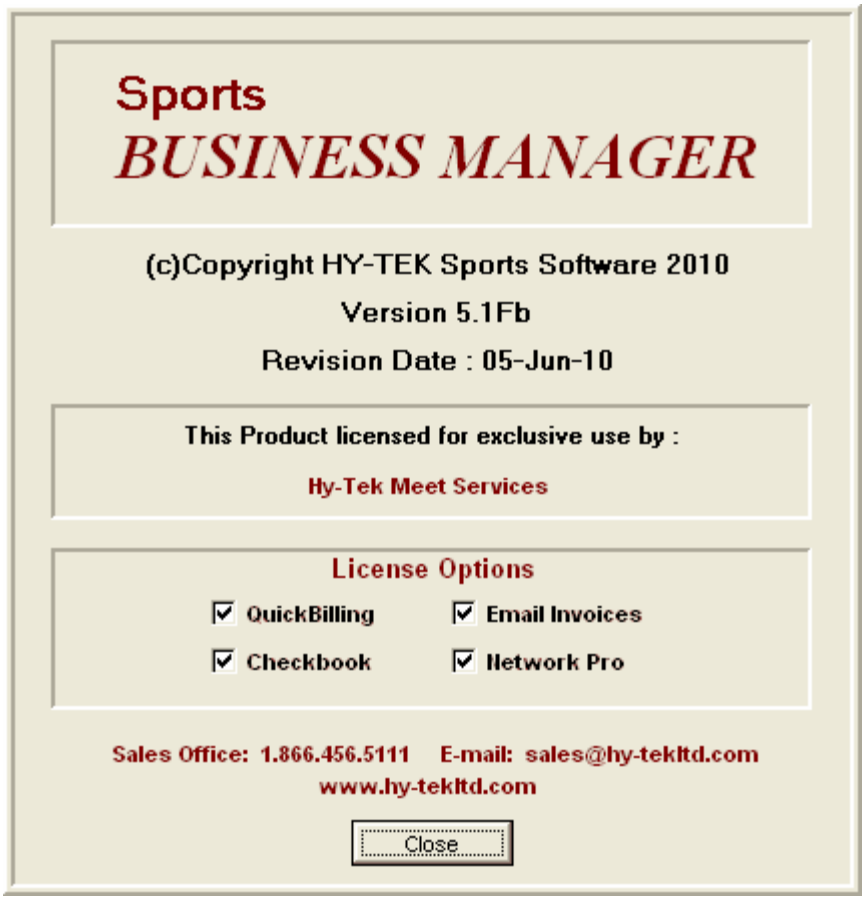
Tech Support

Click this link http://www.hy-tekltd.com/support.html for information about **HY-TEK's Technical Support options**.



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Glossary of Terms

About

Selecting Help and then About from the Main Menu displays certain information about your product (i.e. Product Version and Date, etc.).

Backup

To save copies of files for safekeeping. You can back up files as you work on them to protect your work in case of a power failure or machine problem

Cancel

Clicking on this button will Cancel any of the actions you have chosen and take you back to the Main Menu of **Sports BUSINESS MANAGER for Windows.**

Contents Button

A Help button you can use to return to the main Contents screen which helps you quickly navigate through specific areas of Help.

Database

A collection of data related to a particular topic or purpose. For **SportsBM,** it's all of the information (athletes, families, accounts, invoices, etc) for the Team.

Default

A program's predetermined setting or action that takes effect unless specifically changed.

Directory

An index of filenames and subdirectories. A directory, sometimes called a "folder" can be divided into subdirectories. A root directory is the main directory of a disk. All other directories branch from the root.

Field

A field is a single data item in a record. As an example, when you are in the System Menu, the area where you type the text that you want to appear on your **Sports BUSINESS MANAGER** Reports is a Field. Any portion of a screen provided as an area for input represents a Field.

List Box

A box that displays a list of choices. When a list is too long to display all choices, it will have a scroll bar so that you can view additional items.

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Radio Button

Items preceded by circles are called Radio Buttons. A radio button allows you to select one function from among a group of functions arranged together inside a group box. These functions are mutually exclusive - you can select only one button at a time. The radio button you select will be switched on, while all the other radio buttons will be switched off.

Release Notes

Release Notes contain a list of New Features as well as Corrections for a particular SportsBM release. From the Main Menu Bar, you would click on **Help** then **Release Notes** to display the release Notes for the particular SportsBM Release you are running.

Restore

Restore means to copy your database from a backup disk(s) onto your hard drive. The Restore utility will overlay your currently selected database with the database on the diskette.

Scroll Bars

The bars on the right side and bottom of the window that let you move vertically and horizontally through a list or graphic by clicking on the scroll arrows.

Version

The version of the software that is installed on your computer can be found in the "About" box accessed from the Main Menu.

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