
Contents

1: Funds.....	1-1
Fund Setup	1-1
Add Fund.....	1-1
Fund Information.....	1-2
Fund Periods.....	1-3
Fund Activities	1-4
Predefined Fund Setups.....	1-5
Additional Commands.....	1-6
Program Access.....	1-8
Exercise.....	1-8
Family Fund Setup	1-9
Add Fund.....	1-9
Rates/History/ Keywds.....	1-10
Recap/Totals.....	1-11
Billing Address.....	1-12
Other Tasks.....	1-12
Exercises	1-13
Questions	1-14
2: Quick Posting Processes.....	2-1
School Posting	2-1
Student Posting	2-2
Family Posting.....	2-3
Tuition & Fees Posting	2-4
Common Steps in the Quick Posting Process	2-5
Automatic vs. Individual	2-5
Select the Information to Post	2-6
Review the List.....	2-7
Ready to Post.....	2-7
General Notes About the Quick Posting Processes	2-8
Quick Posting of Payments	2-8
List of Batches.....	2-8
Quick Posting Options.....	2-9
The Posting Screen.....	2-10
The Posting Grid	2-10
Saving, Posting and Printing	2-12
Exercises	2-13
Questions	2-13
3: Processes	3-1
School Processes.....	3-1
Report Card Order.....	3-2
Grade Promotion	3-3
Parent/Teacher Conferences.....	3-4
Semester Average.....	3-4
School Remove/ Advance	3-5
Automatic Class Scheduling.....	3-6
Teacher Exchange	3-7

Grade Book Transfer	3-7
Transfer From Grade Book	3-9
Student Processes	3-10
Health	3-11
Change Talents and Change Ministries	3-11
Change Letters	3-12
Active/Inactive	3-12
Quick Add from Shared Data File	3-13
Quick Delete	3-14
Delete Family Member Remarks	3-14
Delete Permanent Records	3-14
Move Family Member Information	3-15
Family Processes	3-16
Kenedy Directory Information	3-17
Compare Data with Mailing List	3-23
Reorder ID Numbers	3-24
Activate/ Inactivate Families	3-25
Remove Families	3-25
Delete Family Remarks	3-26
Move Family Information	3-26
Change Letters, Visits, Calls, Etc.	3-26
Tuition & Fees Processes	3-27
Move Fund Entries	3-28
Delete Batch	3-28
New Year Fund Setup	3-29
Carry Forward Balances	3-30
PocketLunch®	3-31
System Processes	3-32
Change Area Codes	3-33
Change Case of All Information	3-33
Change Names	3-33
Sacramental Registers	3-34
Preparing to Use Sacramental Register	3-34
Creating Sacrament Registers	3-35
Combine Families and Combine Members	3-36
After Data Merge	3-36
Sharing Data with Church Office	3-36
Converting from School for DOS	3-36
Combine Families	3-36
Combine Members	3-39
Exercises	3-40
Questions	3-40

4: Reports..... 4-1

Overview	4-1
Select Report Screen	4-3
Report Overview Screen	4-5
Select Printer	4-6
The Layout Screen	4-7
Styles	4-7
Text of a Letter	4-8
Indenting Fields	4-9
Printing Fields That Don't Match the Report Type	4-13
Multiple Languages	4-15
Select Funds to Print	4-17

Selections	4-18
Family or Individual Selections.....	4-19
Additional Selections.....	4-20
Condition Lines	4-21
Selection Examples	4-22
Comparing Selection Abilities.....	4-23
Report Preview	4-24
Print	4-25
Print to File.....	4-25
Sending Letters by Email	4-26
Logging Letters	4-28
Custom Reports.....	4-28
Reordering User Defined Reports	4-29
Modify the List of Fields to Print.....	4-31
Label Layout.....	4-32
Envelope Layout.....	4-33
Defining a Form	4-35
Exporting Data	4-36
Questions	4-37

5: Additional Features 5-1

Program Information	5-1
Screen Information	5-1
General Information	5-2
View Log of User Activity	5-3
List of Users Currently in Program	5-4
Using the Keyboard	5-5
Navigation	5-5
Keyboard Shortcuts	5-5
Undo, Cut, Copy, & Paste	5-6
Spell Check.....	5-6
Insert Symbol	5-6
Special Tools You Can Use Anywhere.....	5-7
Year at a Glance (Ctrl + Y)	5-7
Calculator (Ctrl + K)	5-8
Print Screen (Ctrl + P)	5-9
Users and Passwords	5-11
Add User	5-12
Copy Existing User	5-12
Access and Privileges	5-13
Individual Fund Access.....	5-13
User Preferences.....	5-14
Set Security Method	5-14
Setup Options.....	5-15
ID/Number Options.....	5-15
Initial Setup	5-15
Program Name.....	5-17
Sacrament Place Names and Addresses	5-17
Sacrament Tab Names	5-18
Title Definitions	5-18
Unit Name Definitions	5-19
E-Mail Setup.....	5-19
Batch Number and Tax Limits	5-20
Electronic Fund Transfer Setup.....	5-20
Backup and Restore.....	5-22

Backup Concepts	5-22
Backup Current Data	5-23
Restore Data from a Prior Backup	5-23
Setup Automatic Backup Options	5-25
Move Data to Another Computer	5-25
Schedule Automatic Backups	5-26
Test, Fix and Rescue	5-27
Test Program	5-27
Fix Utility	5-27
Rescue Program	5-28
Erase Data	5-29
Disable Passwords	5-29
Exercises	5-30
Questions	5-30

6: CASS Certification and PDS EZ-Mail..... 6-1

Overview of Bulk Mail	6-1
Understanding Bulk Mail	6-1
First Class Mail	6-1
Standard Class Mail.....	6-1
Bulk Mail Requirements.....	6-2
Getting Data Ready for Certification.....	6-3
Bundling, Traying, and Bringing to Post Office.....	6-3
CASS	6-4
CASSIt! Certification	6-4
Testing Addresses for Errors	6-5
EZ-Mail.....	6-6
Potential Savings Using EZ-Mail	6-6
Step 1: Mailing Specifications.....	6-7
Exercise.....	6-9
Step 2: Build the EZ-Mail List	6-10
Step 3: Print the Qualification Report	6-14
Print the Tray Labels	6-15
Step 5: Print the Postage Statements	6-16
Step 6: How to Print the Mailing.....	6-18
Step 7: Packaging, Traying and Mailing	6-20
Post Office Information.....	6-22
Meeting the USPS Move Update Requirements.....	6-24
Address Change Service.....	6-24
NCOA ^{Link}	6-25
FASTforward	6-26
Ancillary Service Endorsements	6-26
Exercise.....	6-27
Questions	6-27

7: Family Info 7-1

The Family Screen	7-1
ID Number.....	7-2
Family Name	7-3
Also Visible In.....	7-4
Active/Inactive vs. Delete	7-4
Primary Information	7-5
Other Addresses	7-6
Map Buttons	7-7

Zip Codes	7-7
Family Recap.....	7-8
Letters, Visits, Etc.	7-9
Navigation	7-10
Tasks.....	7-11
Individual Letter, Label.....	7-12
Keyboard Shortcuts	7-13
Exercise.....	7-13
Parents & Guardians.....	7-14
Status Icons.....	7-14
Parent/ Guardian Name	7-15
Active/Inactive vs. Delete	7-15
Personal	7-16
Phones/EMails/Addr.....	7-17
Ministries / Talents	7-18
Family Recap.....	7-19
Volunteer Areas.....	7-19
Safe Environment	7-20
Letters, Visits, Etc.	7-20
Navigation	7-21
Tasks.....	7-22
Other Tasks.....	7-23
Deceased Members.....	7-23
Exercise.....	7-23
Questions	7-24

8: Students 8-1

The Student Screen.....	8-1
Status Icons.....	8-1
Student Name	8-2
Active/Inactive vs. Delete	8-2
School Info	8-3
Personal	8-4
Schedule	8-5
Grades.....	8-6
Attendance.....	8-7
Phones/EMails/Addr.....	8-9
Discipline	8-9
Bus Info.....	8-10
Health	8-10
Permanent Record	8-12
Sacraments.....	8-13
Certificates.....	8-16
Ministries / Talents	8-17
Family Recap.....	8-18
Contacts.....	8-19
Safe Environment	8-20
Letters, Etc.....	8-20
Navigation	8-21
Tasks.....	8-22
Other Tasks.....	8-23
Deceased Students.....	8-24
Exercises	8-24
Questions	8-25

9: Teachers.....	9-1
The Teacher Screen	9-1
Status Icons.....	9-1
Teacher Name.....	9-2
Active/Inactive vs. Delete	9-2
General Information	9-3
Personal	9-4
Phones/EMails/Addr.....	9-5
Employment	9-5
Schedule	9-6
Further Ed.....	9-6
Credentials.....	9-7
Education.....	9-7
Attendance.....	9-8
Ministries / Talents	9-8
Family Recap.....	9-9
Contacts.....	9-9
Safe Environment	9-10
Letters, Visits, Etc.	9-10
Navigation	9-11
Tasks.....	9-12
Other Tasks.....	9-13
Deceased Teacher	9-13
Exercises	9-14
Questions	9-14
10: Class Schedules	10-1
The Class Schedules Screen	10-1
Class Information	10-2
Class Schedule.....	10-3
Subjects and Skills.....	10-4
Navigation	10-5
Tasks.....	10-6
Check for Overlaps.....	10-6
Print List.....	10-7
Print Schedule.....	10-7
Copy Existing Class	10-8
Exercise.....	10-8
Questions	10-9
11: Keywords.....	11-1
Keyword Maintenance.....	11-1
Keyword Commands	11-4
Delete Keywords	11-4
Combine Keywords	11-5
Keyword Lists	11-6
User Keywords	11-24
Exercises	11-25
Questions	11-25
12: Listing Screens and Easy Lists	12-1
Listing Screens	12-1
Using the Listing Screen	12-1

Customize View	12-2
Easy Lists.....	12-5
Choose the List.....	12-5
Exercises	12-7
Questions	12-7
13: Answers.....	13-1
Chapter 1: Funds	13-1
Exercises.....	13-1
Questions.....	13-4
Chapter 2: Quick Posting Processes.....	13-5
Exercises.....	13-5
Questions.....	13-6
Chapter 3: Processes.....	13-7
Exercises.....	13-7
Questions.....	13-8
Chapter 4: Reports	13-9
Questions	13-9
Chapter 5: Additional Features.....	13-10
Exercises.....	13-10
Questions.....	13-10
Chapter 6: PDS EZ-Mail.....	13-11
Exercises.....	13-11
Questions.....	13-11
Chapter 7: Family Info.....	13-12
Exercises.....	13-12
Questions.....	13-12
Chapter 8: Students.....	13-13
Exercises.....	13-13
Questions.....	13-14
Chapter 9: Teachers	13-15
Exercises.....	13-15
Questions.....	13-15
Chapter 10: Class Schedules.....	13-16
Exercise	13-16
Questions.....	13-16
Chapter 11: Keywords.....	13-17
Exercises.....	13-17
Questions.....	13-18
Chapter 12: View Listings and Easy Lists.....	13-19
Exercises.....	13-19
Questions.....	13-19
14: Appendix	14-1
Predefined Fund Setups	14-1
Church Contributions	14-1
Church Contributions with Extra Contributions.....	14-1
Stewardship	14-1
Formation	14-2
School Tuition.....	14-3
Pledge Drives	14-4
Extra Contributions	14-4
Keyboard Shortcuts.....	14-5
Status Icons	14-6

