

How do I create a roll for future dates?

1. You are able to create a roll based upon a roll created previously for ALL current bookings. You can do this from the families screen or the Roll book. From the families screen **Enter Edit Mode**

The screenshot shows the 'Family Information' software interface. At the top, there are navigation buttons for BPay, Direct Debit, Print Contact List, and a '30 % Report' button. A red 'ENTER EDIT MODE' button is prominent. The interface is divided into several sections:

- 1. Contact Information:** Fields for Title, Home Address, First Name (Peter), Last Name (Williamson), Relationship (Father), Status (Primary Carer), Occupation, Work Company, Family CRN, Phone, and Family ID.
- 2. Child Details:** Fields for Active status, First Name (Belinda), Middle Name, Last Name (Williamson), Address, Suburb, DOB (1 Apr 2004), Sex (Male), Starts School, In Care, End Care, Child CRN, and Child ID.
- 3. Medical Details:** Fields for Doctor, Address, Med Notes, Allergies, and various exemption checkboxes.
- 4. CCB Statements:** A table with columns for CCB #, CCB Date, Family CRN, Child CRN, Hrs, CCB1, CCB2, CCB3, CCB4, Start, and End.
- 5. Child Daily Fees:** A table with columns for Start / End, Roll / Fee, and Days.
- 6a. Child Bookings:** A calendar view showing 'Last roll date' and a grid for days of the week (Mon-Fri) with a 'Here' button.
- 6b. Waiting List:** Fields for Desired Start Date, Room, Wait List Only, and various checkboxes for booking preferences.

2. In section **6a** of the Family screen, click on the **Create Roll** button.

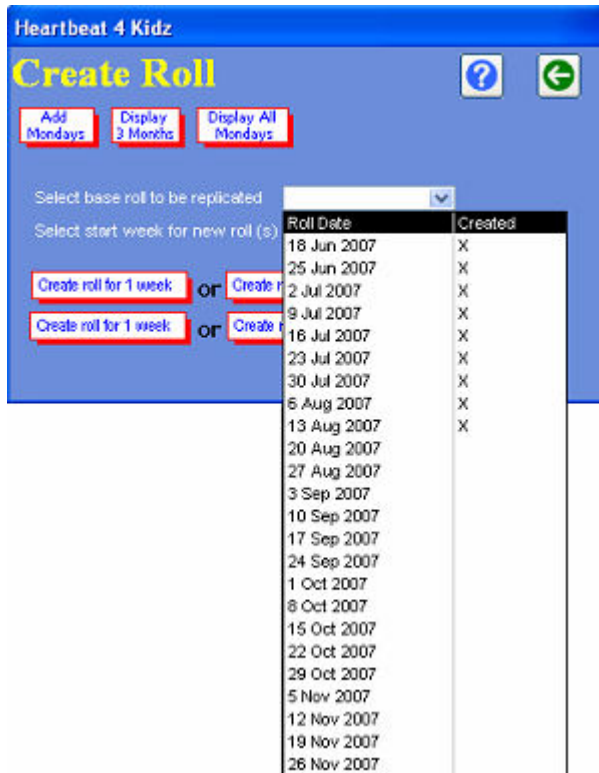
This close-up shows the '6a. Child Bookings' section. It includes a 'Bulk Updates' area with 'Start Date' and frequency options (week, fortnight). Below this, there are dropdown menus for days of the week (M, T, W, T, F) and a 'Clear Update' button. A red box highlights the 'Create Roll' button. To its right is a 'Roll Detail' button, and further right are 'Delete?' and 'Save Roll' buttons. Below the buttons is a 'Last roll date' field and a calendar grid for the week (Mon-Fri) with a 'Here' button and a red 'X' icon.

3. Use the dropdown selector to the right of **Select base roll to be replicated** to select a date that has a Roll that you want to replicate.

The 'Create Roll' dialog box is shown. It has a title 'Heartbeat 4 Kidz Create Roll'. There are three buttons at the top: 'Add Mondays', 'Display 3 Months', and 'Display All Mondays', all highlighted with red boxes. Below these are two dropdown menus: 'Select base roll to be replicated' and 'Select start week for new roll (s)'. At the bottom, there are four radio button options: 'Create roll for 1 week', 'Create roll for 12 weeks', 'every week', and 'every second week'. The first two options are also highlighted with red boxes.

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4. The dates with an **X** beside them represent those weeks that have a roll associated with it. Usually you would select the last week that has a tick beside it. In this case below, click on 13 Aug 2007.



Heartbeat 4 Kidz

Create Roll

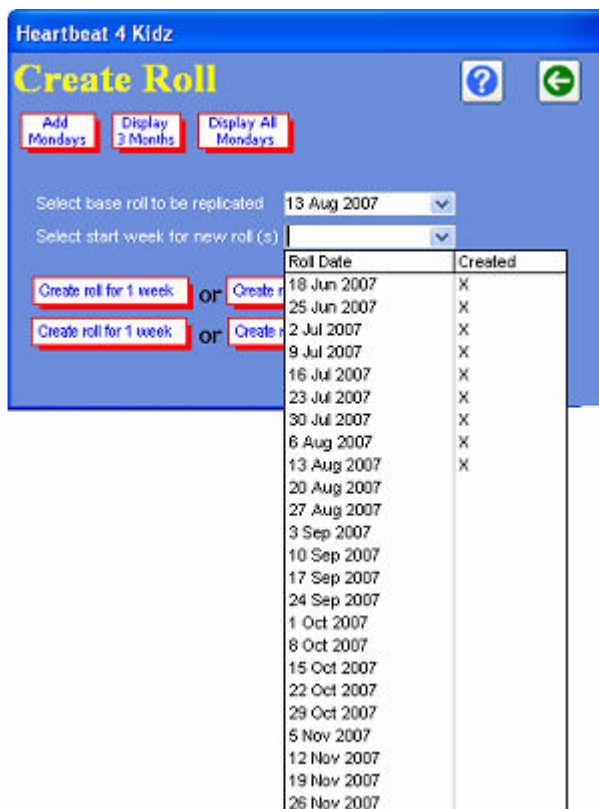
Select base roll to be replicated: [Dropdown]

Select start week for new roll (s): [Dropdown]

or

Roll Date	Created
18 Jun 2007	X
25 Jun 2007	X
2 Jul 2007	X
9 Jul 2007	X
16 Jul 2007	X
23 Jul 2007	X
30 Jul 2007	X
6 Aug 2007	X
13 Aug 2007	X
20 Aug 2007	
27 Aug 2007	
3 Sep 2007	
10 Sep 2007	
17 Sep 2007	
24 Sep 2007	
1 Oct 2007	
8 Oct 2007	
15 Oct 2007	
22 Oct 2007	
29 Oct 2007	
5 Nov 2007	
12 Nov 2007	
19 Nov 2007	
26 Nov 2007	

5. Use the dropdown selector to the right of **Select Start week for new roll (s)** to select the week that you want to start the roll creation. Click on the 20 Aug 2007 in the example below.



Heartbeat 4 Kidz

Create Roll

Select base roll to be replicated: 13 Aug 2007 [Dropdown]

Select start week for new roll (s): 20 Aug 2007 [Dropdown]

or

Roll Date	Created
18 Jun 2007	X
25 Jun 2007	X
2 Jul 2007	X
9 Jul 2007	X
16 Jul 2007	X
23 Jul 2007	X
30 Jul 2007	X
6 Aug 2007	X
13 Aug 2007	X
20 Aug 2007	X
27 Aug 2007	
3 Sep 2007	
10 Sep 2007	
17 Sep 2007	
24 Sep 2007	
1 Oct 2007	
8 Oct 2007	
15 Oct 2007	
22 Oct 2007	
29 Oct 2007	
5 Nov 2007	
12 Nov 2007	
19 Nov 2007	
26 Nov 2007	

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6. There are a number of options for the roll generation from here. The most popular used is the button which will generate the roll for the next twelve weeks, as illustrated below, **Create roll for 12 weeks**. The button will turn yellow as it populates the roll. You can then close the screen using the green arrow.



7. The other options are:

Create roll for 1 week (every week) : -

duplicate the roll for the one week only

Create roll for 12 weeks (every second week) : -

duplicates the roll fortnightly for twelve fortnights.

8. You can also create the roll using the same technique, from the **Roll Book** screen, in **Edit Mode**, using the **Create Roll** button.

