



OWNA

**Extracting information from
Kidsoft**

Extracting the data from Kidsoft

We will be extracting 3 types of reports:

- 1 Attendances**
- 2 Parent Contact information**
- 3 Family Balances**

1. Attendances

The screenshot shows the iEnrol Utilisation interface. At the top, there is a navigation bar with a home icon, a search bar labeled 'Universal Search', and menu items: Service, Families, Bookings, Reports, Framework, and Videos. Below this is a tab labeled 'iEnrol Utilisation'. The main content area has a blue header with a clock icon, the text 'iEnrol Utilisation', and a 'Help' button. Below the header, there are several controls: 'Display Mode' set to 'Utilisation' with a dropdown arrow and a green checkmark, and a checkbox for 'Show blank rows for vacant places'. The 'Rooms' field contains the text 'Leave empty to select all' with a green checkmark. The '*Week Ending' field contains the text 'dd-mon-yyyy' and is highlighted with a red box. Below these fields are three buttons: 'Search', 'Email', and 'Generate CSV' (which is highlighted with a red box). To the right of the 'Generate CSV' button is a 'Save / Print PDF' button.

1 Select Week ending (you can use the current week ending or the next week ending if you have permanent bookings in place)

2 Select Week ending (you can use the current week ending or the next week ending if you have permanent bookings in place)

3 The file will appear at the bottom of your screen in a excel CSV format and is typically stored to your Downloads folder on your computer

Note: Depending on your browser, the download might be blocked, so please enable downloads if you receive this message.

2. Parent & Child Information

a

Children Report

Service Families Bookings Reports Framework Videos Universal Search

Children Report

Children: Leave empty to select all ✓

Rooms/Buses: Leave empty to select all ✓

Filter By (All Tags): Active ✓

Filter By (Some Tags): Including ✓ Excluding ✓

Date Range: 15-Jun-2020 Mon ✓ - to - 21-Jun-2020 Sun ✓

Exit Date Range: dd-mon-yyyy ✓ - to - dd-mon-yyyy ✓

Show All Guardians for Child Show Child Address Totals Only

Search

XML Email Generate CSV Save / Print PDF

b

Name & Addresses

Service Families Bookings Reports Framework Videos Universal Search

Names and Addresses

Children: Leave empty to select all ✓

Rooms: Leave empty to select all ✓

Authorisation: Leave empty to select all ✓

Date: 15-Jun-2020 Mon ✓ - to - 21-Jun-2020 Sun ✓ Child Status: Active ✓

Print One Child per Page

Order By Emergency Priority

Search Email Generate CSV Save / Print PDF

c

CCS Enrolments

Service Families Bookings Reports Framework Videos Universal Search

CCS Enrolments

Filter: Start typing to search for Guardians, Children, Enrolments ✓

Enrolled During: dd-mon-yyyy ✓ - to - dd-mon-yyyy ✓

Type: Select an Enrolment Type ✓

Rooms/Buses: Leave empty to select all ✓

Filter By (Some Tags): Including ✓ Excluding ✓

Status: ✓ Show History

Search Email Generate CSV Save / Print PDF

3. Family Account Balances (Bond & Fees)

a

Customer Account Balances

Navigation: Service Families Bookings Reports Framework Videos | Universal Search

Customer Account Balances

Customer Account Balances [Help]

Guardian Status: All ✓

Week Ending Range: dd-mon-yyyy ✓ - to - dd-mon-yyyy ✗ Without Estimates

Buttons: Search, Email, Generate CSV, Save / Print PDF

b

Bond Report

Navigation: Service Families Bookings Reports Framework Videos | Universal Search

Bond Report

Bond Report [Help]

Date: dd-mon-yyyy ✗

Type: Bond ✓

Include Guardians with \$0 held

Buttons: Search, Email, Generate CSV, Save / Print PDF

c

Aged Balances

Navigation: Service Families Bookings Reports Framework Videos | Universal Search

Aged Balances

Aged Balances [Help]

Filter: Start typing to search for Guardians, Children, Enrolments ✓

Filter By Guardian Tags (All): ✓

Filter By Guardian Tags (Some): Including ✓ Excluding ✓

Type: Age of Debt by Billing ✓ As of Date: dd-mon-yyyy ✓

Guardian Status: All ✓ Order by: Name ✓ Columns: Credit ✓

Day Ranges: 7 ✓ 14 ✓ 30 ✓ ✓

Balances: Settled ✓ Min. Amount Owing: ✓

Buttons: Search, Email, Generate CSV, Save / Print PDF



Get in touch at anytime... we're here to support you!

www.ownna.com.au