



**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**

Reports

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Service Families Bookings Reports Framework Videos

Universal Search 🔍

Enrolment

CCMS Enrolments

CCS Enrolments

iEnrol

1 iEnrol Utilisation

Family

Additional Needs

Allergies

Birthday List

Bookings

Booking Summary

Children

Child Well Being

Guardians

Immunisations

Medical Conditions

2 Names and Addresses

Forms

Control Report

DDR Form

Sign In/Out

Sunscreen Record

CWA Form

Other

Child Record Collection

Custom Data

Comms Overview

Comments

Documents

Fees

iCheck-In

Roll

Utilisation

Financial

Aged Balances

Banking

Bond

3 Customer Account Balances

Customer Account Statement

Old CAS

Discounts

End of Month

Financial Detail

Financial Summary

KPI

Surcharge Report

Payments

iDebitPro Overview

iDebitPro Payment Fees

Payment Receipt

Payment Schedules

Payments

CCMS

CCMS Payments

Enrolment Advance

Entitlement Variation

IS Case Claims

IS Cases

Personnel Profile

SCCB Entitlement (18%)

CCS

CCS Entitlements

CCS Entitlement Variation

CCS Payments

Exceptional Circumstances

Supplementary

1. Attendances

The screenshot shows the 'iEnrol Utilisation' interface. At the top is a green navigation bar with a menu icon, back/forward arrows, a home icon, and links to 'Service', 'Families', 'Bookings', 'Reports', 'Framework', and 'Videos'. A 'Universal Search' bar is on the right. Below this is an orange tab labeled 'iEnrol Utilisation'. The main header is light blue with a clock icon, the text 'iEnrol Utilisation', and a 'Help' button. The form area has a 'Display Mode' dropdown set to 'Utilisation' with a green checkmark, and a checkbox for 'Show blank rows for vacant places'. The 'Rooms' field contains 'Leave empty to select all' with a green checkmark. The '*Week Ending' field contains 'dd-mon-yyyy' and is highlighted with a red box and a red prohibition icon. Below this are buttons for 'Search', 'Email', 'Generate CSV' (highlighted with a red box and a red line pointing to annotation 2), and 'Save / Print PDF'.

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

Navigation: 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

Navigation: 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

Navigation: 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

Guardian Status: All ✓

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

Search Email Generate CSV Save / Print PDF

b

Bond Report

Navigation: Service Families Bookings Reports Framework Videos | Universal Search

Bond Report

Date: dd-mon-yyyy ✗

Type: Bond ✓

☐ Include Guardians with \$0 held

Search Email Generate CSV Save / Print PDF

c

Aged Balances

Navigation: Service Families Bookings Reports Framework Videos | Universal Search

Aged Balances

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

Filter By Guardian Tags (All): ✗ Active ✓

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: ✓

Search Email Generate CSV Save / Print PDF



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

www.ownna.com.au