Introduction

Welcome to the NEW release of Harmony Light, the most comprehensive business tool for Home Based Childcare Educators. This new release, Version 7.00 incorporates many new technical innovations as well as the mandatory functional changes brought about by changes to government regulations.

Please read the rest of this document carefully to help you understand the many changes that have occurred. In addition to this document, the User Manual has also been updated to reflect these changes. If you are unsure of how to use any of the changes, just press F1 (the global help key) while in Harmony at the spot you are not sure about, and the appropriate help screen will be displayed to assist with your problem.

Name Change

Harmony

Harmony Light v7 has been renamed to Harmony Light for Educators. The Desktop Icon has been updated, it is no longer the 3 balloons; you will now see a new 2 people icon.

You

Throughout the system, wherever the old term "Carer" was used, this has been changed to "Educator".

Changes to Timesheets

Calculations

On certain occasions, you might want to process Timesheets into the future so that you can get the parent to sign them before they go away on holidays. In version 6, there was a limit on how far you could process in advance. We have made this a variable that you can set yourself.
Click on Setup, Timesheet Options and change the value in Maximum Calculation Date......... (Weeks after the current week)

Declaration

The Payment Certification has become almost obsolete, because it is NOT necessary for you to collect or the parent to pay the gap fee before Child Care Benefit is payable, as was the case in the past. The ONLY legal requirement is an obligation to pay. That means, there must be a cost of care on the timesheet, but not a Parent/Educator certification that it has been paid. In fact, given the new CCMS payment process, it is NOT recommended that you produce a child care receipt for the gap fee until after the timesheet has been processed and payment has been notified via your Payment Advice from your service.

The Declaration at the bottom of the timesheet now has four different options to cater for the different service requirements:
This can be set or changed in Setup, Timesheet Options

1. **Leave the Certification blank**
    This will result in two signature boxes, one for the Educator and one for the Parent/Guardian. There is no specific declaration.
2. **I certify that I have received/paid - Fee Charged**
    When this is printed on the timesheet, it will replace "Fee Charged" with the value of the Gap Fee and print it as part of the declaration
3. **I certify that I have received/paid $...........................**
    When this is printed, it will NOT print the Fee Charged, it will leave a spot for you to WRITE in the amount the parent paid you. This will cover short payments, no payments and situations where you might have given the parent a discount
4. **I certify that all of the above information is correct**
    a. *This is a simple declaration that does not involve payment of fees at all. This is the most appropriate to suit the current legislation.*

Change to Format

You will find that the Timesheet and Booking Sheet grid has changed quite substantially. These changes have been necessary to accommodate the following new or changed functionality:

Subsidy Columns

You will notice that the various types of subsidy have been split into different fields so that you can see the breakup instead of a single total.

Child Care Rebate (CCR)

CCR Rules

This is how CCR works, and this is how Harmony will ESTIMATE any CCR payments for children that you nominate will receive CCR.

1. CCR is calculated on the Eligible Gap Fee (That's the total gap fee less any Non Eligible amounts like Penalty Fees)
2. CCR is 50% of the Eligible Gap Fee
3. CCR will be calculated by Centrelink,
    a. For Children who have a CCB Percentage greater than 0.00%, Centrelink will retain 15% of the CCR until the annual reconciliation has occurred. They will then process any shortfall/overpayment directly with the parent.

> *If you want to do this calculation in your head, it works out to be 42.5% of the eligible gap fee*

    b. *For Children who have a specific CCB percentage of 0.00% Centrelink will calculate and pay the full 50% of the eligible gap fee. They will not retain the 15% buffer.*

    c. *Lump Sum Families will NOT get CCR paid to you via the service because it all happens at the end of the year, i.e. Lump Sum for CCB and CCR.*

    d. *CCR will not be paid via the service to families claiming quarterly during the 4th quarter, i.e. April-June quarter at all. Centrelink will retain the CCR for reconciliation purposes even if the child has not reached the limit.*

4. *IMPORTANT: CCR will stop at some point and Harmony won't know when that is going to be. There is no way the software will know how much total CCR a child has received (DEEWR are adamant about this). You might think you know; you can even work out what has been paid to you, but you will not know about CCR paid to other Educators and to other services nor details of other circumstances that might change the calculation for a specific child.*

5. *In Split Care situations, where you are not the only educator, the CCR will be distributed to you in direct proportion to the value of your gap fee.*
   E .g. The total gap for both educators is $100
   Centrelink pay $42.50 CCR to the service.
   Your gap fee was $10, and the other educator who cared for the child was $90
   You will get 42.5% of $10 = $4.25, the other will get 42.5% of $90 = $38.25 that gives a total of $42.50

How to tell Harmony to Calculate CCR for a child

Your scheme will know which parents have nominated their CCR to be paid to you via the service. They may be inclined to pass this on, and they may not. The best way to find out, is to ask the parent. When you are told that a parent/child has nominated to pay CCR to you via the service, you must then tell Harmony to make the CCR estimate occur.

In the Child record, not the parent record (a parent can nominate one child but not nominate a sibling) there is a new tick box called Estimate Childcare Cash Rebate (CCR). Once you tick this, Harmony will estimate the CCR.

How to Verify CCR payment

As for all subsidy estimates, it is essential to make sure the estimate was correct before receipting the timesheet. You are used to Confirming Subsidy in v6, and the Confirm Subsidy process is still the same. However, the difference is that you should now check and confirm the different components separately.

When you receive your Payment Advice, (you will notice it has more columns than the previous one) you should Click on the Confirm Subsidy button on the Timesheet screen – Harmony will display the new Confirm Subsidy windows:

	Tot Fee	Levy	CCB	JFA	CCR	Oth Sub	Discount	Fee Chg
Estimated:	449.00	36.00	407.67	69.33	3.40	0.00	0.00	4.60
Payment Advice Amounts:	449.00	36.00	407.67	69.33	3.40	0.00	0.00	4.60

Timesheet Number: **5,472**
Week Commencing: **31/01/2011** (Monday)   Ending: **06/02/2011** (Sunday)

Check the Estimated values against the values on your payment advice, and if they are different, change the Payment Advice Amounts on the screen to match what is on your Payment Advice. Once that is done, your Parent Receipt will reflect the correct amount of the parent payment (Fee Chg).

Jet Financial Assistance (JFA)

JFA Rules

In v6, there was single field where you entered the total number of JFA hours onto the timesheet. The JFA rules have changed, and this necessitated a change to the format of the timesheet and the way in which you enter JFA hours. Before you look at how to do it, it is a good idea to try and understand the new method of nominating and calculating JFA.

Unfortunately, it is a bit tricky to explain because Centrelink work in hours, BUT DEEWR work in Days of 12 hours maximum. We recommend you forget Centrelink and get used to the DEEWR method because they control the validation of your timesheets.

Here is how it works:
Your service is obliged to Request JFA details from DEEWR via the CCMS interface, and the results of that request are used to validate any JFA claim made for the child.
If a child is allocated 3 Days of JFA, that will be returned as 36 hours. That is because the daily maximum is 12 hours. However, 36 hours can ONLY be allocated to 3 days. You cannot, for example allocate the 36 hours to 5 six hour days. 36/12 = 3 Days maximum.
You could allocate JFA to 3 twelve hour days or even 3 four hour days

If the child needs more days then, the parent should request more days from Centrelink.

For simplicity this is what you will get, 12 hours – 1 Day, 24 = 2 Days, 36 = 3 Days, 48 = 4 Days, 60 = 5 Days, 72 = 6 Days, 84 = 7 Days, now here it gets tricky, 96 = 8 Days. How can there be 8 days? There are only 7 days in a week? If you have a JFA day that exceeds 12 hours, e.g. overnight care, then you would have to use up 2 JFA Days to cover more than 12 hours. We have seen a child with 14 Days JFA to accommodate a full 7 days of 24 hour care.

Because Harmony Light doesn't have access to the official JFA Details, it will take your word that the nominated JFA Days are correct. However, if you get them wrong, your timesheet will be rejected when your service attempts to enter the JFA days in their system.

IMPORTANT: We recommend that you discuss the JFA nomination with your service so that you are privy to the details that they have, and to minimise the possibility of the JFA being incorrect.

How to Nominate JFA for a Child

The best place to setup the JFA is in the child's Booking/Contract timesheet, although, both Booking Timesheet and Actual Timesheet have the same functionality; if you do it in the contract/booking timesheet, it will be a regular thing and you will only have to change it if the number of Days in care or number of JFA Days change.

In the Timesheet grid, Click on the Override Button, Then Select the new JFA Tab – Harmony will display the JFA details window;

For each Day that you want to allocate JFA, click the drop down and select either

> *Yes – This will allocate all the hours in care on that day UP TO a maximum of 12 hours*

> *Specify – If you need to allocate more than 12, (as in Wednesday above) then set the number of hours to allocate.*

NB: In the above example the child would have been allocated 3 Days (36 hours) to cover 3 sessions

When a child is on JFA, it is not necessary for the care to coincide with study, so parents are not obliged to nominate which days the JFA should be used on. To benefit the parent, it is best to nominate the days that cost more rather than the days with the most hours.

How to verify JFA payment

As for all subsidy estimates, it is essential to make sure the estimate was correct before receipting the timesheet. You are used to Confirming Subsidy in v6, and the Confirm Subsidy process is still the same. However, the difference is that you can now check and confirm the different components separately if you wish.

When you receive your Payment Advice, (you will notice it has more columns than the previous one) you should Click on the Confirm Subsidy button on the Timesheet screen – Harmony will display the new Confirm Subsidy windows:

	Tot Fee	Levy	CCB	JFA	CCR	Oth Sub	Discount	Fee Chg
Timesheet Number: 5,472								
Week Commencing: 31/01/2011 (Monday) Ending: 06/02/2011 (Sunday)								
Estimated:	449.00	36.00	407.67	69.33	3.40	0.00	0.00	4.60
Payment Advice Amounts:	449.00	36.00	407.67	69.33	3.40	0.00	0.00	4.60

Check the Estimated values against the values on your payment advice, and if they are different, change the Payment Advice Amounts to match what is on your Payment Advice. Once that is done, your Parent Receipt will reflect the correct amount of the parent payment (Fee Charged).

Inclusion Support Subsidy (ISS)

As of 3rd October, ISS will be calculated by the Department of Employment, Education and Workplace Relations (DEEWR) and will be subject to a set of rules that Harmony Light does not have access to. To this end, we have removed all trace of ISS from the timesheet calculation process. If you do receive ISS, the amount will be printed on your Payment Advice, and you should enter it into accounts as Income once you know the value of the payment.

Timesheet Validation Changes

There have been a number of changes that apply to the validation and calculation rules in the timesheets

Admin Levy

Some services have implemented a two tier Parent Levy whereby there is a fixed portion and a variable (per hour) portion. This has been in effect for a while now, but until v7, Harmony Light has not been able to support this two tier approach. Those Educators whose service does use this method have had to manually override the levy to work around this shortcoming. Harmony Light v7 now supports the two tier Parent Admin Levy calculation, so you should remove any Levy overrides that you may have setup in the Bookings.

JFA & SCCB

We have added some new edit checks into Harmony to reflect changes to the child care rules.

It is not possible to have Special Child Care Benefit (SCCB) AND Jet Financial Assistance (JFA) in the same week – Harmony now prevents you from doing this.

SCCB & 24 hour care

We have added some new edit checks into Harmony to reflect changes to the child care rules.

It is not possible to have Special Child Care Benefit (SCCB) AND approved 24 hour care in the same week – Harmony now prevents you from doing this.

Public Holiday IN CARE

If you care for a child on a Public Holiday, it is appropriate that you would want to charge a higher hourly rate. To get Harmony to use your Public Holiday rate, you would select the drop down on the Casual field for that day and select PubHol. As a consequence of that, Harmony would also move any Standard Hours into the Non Standard hours field. This used to be the rule, but CCMS changed that rule a while ago, and we have now implemented that in v7.

You still enter the Public Holiday in care the same way, but any Standard Hours will remain in the Standard Hours field.

Absences

Absence Counts

In v6, the absence counts rolled over on the first Monday of July. Unfortunately, Centrelink changed the rules again, and now the Absence Counts and the 24 hour care counts both reset on the 1st July each year, regardless of which day it is.

Harmony Light v7 has been modified to comply with this change. Consequently, when you install version 7, your Harmony Absence counts might change slightly, but, they will now match the counts that you see on your Payment Advice.

Confirm Subsidy Process

Why do I have to this?

It is really important to realise that the Harmony calculations can only ever be viewed as Estimates. Since the introduction of the CCMS system, the dynamics of the process have changed somewhat. Prior to CCMS, Harmony would receive the CCB details from Centrelink and was able to calculate the CCB and other types of subsidies based on that information. Then the scheme, would advise Centrelink what those calculations were every quarter. If there were any discrepancies, they would be adjusted each three months. Even though they were still technically estimates, on a week by week basis, they were as good as correct and could be relied upon until the end of the quarter.

Now under CCMS, the amount of information available is deliberately restricted and the estimate is more likely to be incorrect in a changing situation. Your attendances are submitted to Centrelink using the CCMS web interface by your scheme, and Centrelink do the calculations and make the CCB and other subsidy payments either weekly or fortnightly, depending on how often your scheme submits them.

The Harmony estimate is useful, and in the majority of cases, once the basic information like percentages, eligible hours etc have been entered into Harmony, the estimate is fairly predictable.

However, it is ONLY an estimate and should not be totally relied upon until it has been confirmed. This estimate has taken on a new dimension with the introduction of CCR and

the changes to JFA (see earlier), so it is essential to use the estimate to assist with cash flow, but to use the actual values when it comes to receipting and reconciling parent dues.

What are the Steps?

1. Do your timesheets, and if it suits your business model, ask the parent to pay you the estimated Fee Charged. However, when you receipt the payment, do not tag the timesheet, simply enter it as a cash receipt. This will credit the parent account by the amount you have just receipted.
   The Timesheet will have a Status of "In Progress", and cannot be receipted in that status.

2. When you receive your Payment Advice, work through each timesheet in turn. In the Timesheet List, highlight the timesheet, Click on "Confirm Sub" and check the estimated amounts against the amounts on the Payment Advice.
   If the Tot Fee and/or Levy are different, cancel the Confirm Subsidy and select Change on the Timesheet to fix the Tot Fee or the Levy to match the Payment Advice. It is important to do this before confirming the subsidy, because once that has occurred, the timesheet will be locked once it is confirmed.
   If there are any differences in the subsidy values, there is no need to try and change the timesheet calculation, remember it is only an estimate. For example, if the difference was caused by a change in percentage or child count etc, just make sure that you fix the contract/booking so that it is correct next time.
   You can simply change the values and then Click Save.
   The Timesheet will have a Status of "Confirmed", and can be receipted in that status.

3. Child Care receipts are not legally mandatory any more, although it is good business practice to provide your clients with detailed receipts for their own information and record.
   If the parent has previously paid the estimated Fee Charged, and if that amount was sufficient to cover the debt, then you can receipt that timesheet.
   In Receipts, New Receipt, DO NOT enter the payment again. Harmony will have retained the previous payment, and the account will be in credit. Simply Tag the timesheets(s) that you want to receipt. Harmony will reduce the credit as you Tag each timesheet.
   NB: Harmony will NOT allow you to receipt a timesheet unless there is sufficient payment to fully cover it.
   If the parent hasn't yet paid, enter the amount they pay and Tag the timesheets that the payment covers.

   NB: If you use the auto transfer to Income facility, the Income does NOT accrue until you Tag and receipt the timesheet. The prepayments are NOT posted as income, they are treated as prepayments. From an accounting perspective, they are a liability not Income.

Discount Processing

A discount is where you, at your discretion, decide not to charge the parent the full gap fee. This can be a part discount or even a full discount. In reality, it can be a Bad Debt where the parent defaults and just doesn't pay. The final outcome is the same, you don't get paid the full cost of the care.

In Version 6, we had the discount facility, but it did print on the timesheet and if you sent those timesheets to your scheme, they did see the discount. This caused some concern and there have been a number of attempts to record the fact that the parent didn't pay the full contribution, mainly because of Child Care Rebate. Most of these were futile because of the way that CCMS processes attendances.

If you provide any of your parents a discount or they default and you have to write off the debt, it is not something that DEEWR wants to know about and without a lot of additional work for the scheme, it is not something that can be communicated to them anyway. However, it is something that your accountant and subsequently the ATO do want to know about because it effectively reduces YOUR income and you don't want to be paying tax on money you didn't earn.

In Version 7, we have retained the discount option, BUT we have removed the reporting of the discount from the actual printed timesheet that goes to the scheme. If you do process a discount or write off a bad debt, it will be reflected in the receipt and consequently your income, but it won't reduce the Fee Charged (the parent's obligation) that is reported to your scheme and finally DEEWR & Centrelink.

Pre-School Hours

A year ago, DEEWR asked services to report Pre-School attendances as part of the attendance information. This was purely a statistical exercise and the schemes version of Harmony was amended to accommodate this. If you want to assist in this regard, you are now able to enter Pre-School details into Version 7 that will be printed on your timesheets for your scheme to pass on to DEEWR.

Why enter them?

Unfortunately, the Pre-School reporting specification was not clearly though out, and the end result was that only Pre-School sessions that occurred at the same time as a charged session of care could be reported. Attempting to report that you know the child goes to Pre-School on Tuesday, if you don't have the child in care on Tuesdays is a waste of time and not worth your efforts.

The ONLY time that the Pre-School information will be added to your timesheet, is if you take the child to Pre-School, collect the child from Pre-School and are totally responsible for the child while at Pre-School, resulting in you charging the parent for the Pre-School hours. If there isn't a charged session of care, the Pre-School details will not be reported, and therefore it is pointless entering Pre-School sessions into Harmony (unless you would like to record that information anyway).

How to Enter Them

In the child record, there is a new Tab Called PreSchool. You can Add a Pre-school entry that reflects the child's attendance at Pre-School. The Date Range (Term Dates) and the Days and Times the child would normally attend. As this is statistical, you do not need to make temporary changes on the fly, e.g. the child is sick or on holidays. This information does not affect any of your timesheet calculations.

Receipting Options

Receipt Browser Date Range

On a number of occasions, especially where a client's account is not up to date, when you go into New Receipt, you could not see their timesheets because they were dated too far into the past. This was done to speed up the display of Timesheets, and was set at 6 weeks in the past. We have increased the past date range to cover 20 weeks so that those old timesheets should now be in the view. Of course, if they are older than 20 weeks, you can still use the "Set Timesheet Date Range" button to temporarily extend it further back.

Print, Email Now, Email Later, Not Required

When you create a new Receipt, you now have four options as to what to do with the receipt:

1. *Print*
   This is the same as before, at the end of doing the receipt, Harmony will Print it.
2. *Email Now*
   If you choose this option, Harmony will automatically Email to the parent (assuming you have setup the email address).
3. *Email Later*
   If you choose this option, Harmony will create the Email and place it in the Outbox of the Email Log so that you can send all the emails together later
4. *Not Required*
   As receipts are not a legal requirement, and not all parents want an individual receipt anyway, you can elect to NOT print or email the receipt. Harmony will still create it and it will be available for reprint or email later if necessary.

Print Receipt New Option

Version 6 would always print two copies of the receipt on a page. This was primarily so that you could cut it in half, give one copy to the parent and send the other copy to the scheme. As receipts are not actually required by law, you do not always need two copies.

Perhaps the parent doesn't want it or the scheme doesn't want it. Of course if neither wants it, you would use Not Required, and if both still want it, then you can still do two copies on the same page as before.

The option to do this is a Tick box on the Print Receipt dialogue that precedes the printing of the receipt.

Reprint Receipts

If you elected Not Required, or even if you did actually print the receipt (but it was lost or destroyed, you are able to Reprint one or more receipts for an individual parent of a group of receipts for a receipt range or a date range for a group of parents:

1. *To do one or more receipts for a single parent, Select Work Centre, Receipts, Reprint a Receipt*
   You can Tag one or more or even all receipts and then elect to Print or Email them to that parent
2. *If you have elected Not Required, then you can use the New report, Reprint Receipt Range (see below). Select Reports, receipts, Reprint Receipt Range. You can elect to Print or Email the receipts. You can elect to print a set of receipts by receipt number, or all receipts issued for a particular date range.*

Accounts

View Transaction Date Range

When you select Work Centre, Accounts, Harmony v6 would display the complete list of Income and Expenditure transactions. In version 7, we have made a change that will allow you to restrict that display in a number of ways:

1. *The default list will display the current financial year*
2. *If you select Date Range, you can:*
   a. *Clear the dates to show ALL transactions again.*
   b. *Select the current or a previous financial year.*
   c. *Select the current BAS period or a previous BAS period.*

This new display option also works with the existing display options that allow you to restrict by Transaction Type, so you can view just Income or just Expense transactions and also the Account filter that allows you to display transactions for a single Account, e.g. Electricity.

NB: The Account filter requires that you have selected the appropriate Transaction Type.

Recurring (or regular) Transactions

Sadly, we have to pay bills, and some of those bills just keep coming. To save a little bit of time, we have added a new facility that will allow you to setup those recurring bills so that when they do get paid, you just need to enter the date, and if necessary perhaps the amount if it changes.

In Setup, Recurring Transactions, Click Add and enter the most common transactions, e.g. Electricity Bill, Insurance and so on. You can enter or leave out as much as you think appropriate. Basically, what you are doing is creating a template for when you actually do have to enter that expense into your accounts.

Once in the Recurring Transactions list, it can be used when doing your Account Transactions.

To use this new feature, Click Work Centre, Accounts, Add (to do enter a transaction)

Instead of entering all the fields, Click on the Recurring Transactions button (bottom left) and select the appropriate preset transaction. Once selected, you need to enter the payment date, and if necessary change the amount.

NB: This feature is not like an automatic direct debit, it will not post the transaction unless you do it.

Import Fee Schedules

Where From?

In Version 6, the Import Fee Schedule Browse option only asked you to identify the folder where the 6 files had been saved. Unfortunately, during the Browse, you were unable to actually see if you had the correct folder. In Version 7, when you Browse for the Fee files, Harmony will expect you to point to a specific file called FeeName.ADT. You will still browse to the folder, but Harmony will show you that file and will expect you to select it.

Zip or ADT format?

Having said that, there is a new but annoying trend with some web based email clients (Gmail, Hotmail, Live to name a few) when you select Save All Attachments or Download All Attachments, instead of saving the 6 fee schedule files, they create a single ZIP file that contains them all.

The current solution to this, is to Save or Download each of the 6 files one at a time, however, to counter this, Harmony v7 will now look for (in addition to the ADT above) a file called fdcfeeschedule.zip. If you select the ZIP file that contains your 6 fee schedule files, Harmony will extract them from the Zip file and Import them automatically.

Printing Reports

PDF Support (New)

When you install Version 7, the installation will also install a Portable Document Format (PDF) printer driver called Harmony PDF Printer. You will see this new printer in your list of printers.

Harmony has been modified to optionally use PDF to Preview and print reports, although the original print methodology is still available, the PDF method has many advantages:

1. *Reports printed using the PDF driver can be easily saved. A possible reason for wanting to do this, would be if your printer stops working. You can save the reports to a USB stick and take them to another computer to print.*
2. *Reports produced by the PDF driver can be sent to other people, BUT with the added security that the report cannot be modified, like the current RTF export reports.*
3. *The biggest advantage for using the PDF driver is the ability of Harmony to email reports directly as PDF files.*

There is one Caveat to this process, not only for you but also for the recipients of the PDF reports. In order for you to produce a PDF report and preview it in Harmony, you MUST have a PDF reader. There are a number of different free PDF readers, the most common and popular one being Adobe Reader. If you don't have a reader, then you will have to install one. If the recipients of your reports don't have a PDF reader, you can pass on this advice to them also.

If you are not sure if you have a suitable reader, the first time (after installing v7) you try to Preview a report, Harmony will offer to Test your PDF ability. If you click Yes, Harmony will attempt to open a Test PDF file that is distributed with v7. If you see that, then all is good, if you receive an error, Harmony will revert to the old Preview method, so you can later download and install a PDF reader

Instead of providing the link to the Adobe download, (they are likely to change it, I suggest you just type in "Adobe Reader" in your search engine and follow the links to download and install. Once that is done, you should login to Harmony, Select the Setup, Preferences menu option and tick PDF Preview to tell Harmony that you now want to use PDF.

Children In Care Report (New)

This report is available in reports, Child, Children In Care.
It works for the current week and up to 4 weeks in the future. It only prints information from Bookings/Contracts. It is useful as a planning to provide you with a schedule of arrivals and departures:

It will allow you to select a Start Date and a number of weeks from 1 to 4;
You can print the report in order of child age or child name;
You can print Total Hours in care for each child, or the booked Start and End times for each child;

Print Range of Receipts (New)

Because receipts are no longer mandatory, there is a new option in the New receipt dialogue to NOT print a receipt. However, even if you opt to do this, you can always re-print the receipt later if asked for it.

As an offshoot of this, it also means that you can elect NOT to print receipts at the time, either to save time or perhaps because your printer is not working, or run out of ink etc. To take advantage of this, we have added a new report called "Reprint Receipt Range". You can use this to reprint all the receipts in one go at a later stage, or, you can use it to email all the receipts in one go at a later stage.

Parent Invoice – Include Logo

The Parent Invoice is a summary of charges, and not everyone uses it. However, if you do provide your parents with an invoice, it is now possible to personalise the invoice by printing your own logo on it. You need to have your logo saved on disk somewhere in BMP, JPG, or TIFF format.

To add your logo to this report, Click on Setup, Educator Details – Click the Browse button to the right of the Educator Logo field and search for and select your logo file. Click Save. The logo will print in the middle of the invoice at the top.

Using Email Directly from Within Harmony

Sometimes, you want to email all your parents, or just send a quick email to your service, your accountant or even Harmony Support. Sometimes you would like to email an invoice or a receipt to a parent, an Income/Expenditure report to your accountant, your timesheets to the scheme. Well now, with the release of Version 7, all that is possible, assuming, of course, you have Internet access and an email address.

Simple Mail Transport Protocol (SMTP)

In Version 6, Harmony used a technique known as Simple MAPI to create and send emails. Unfortunately, not many modern Email Clients, and definitely not web based clients like Gmail and Hotmail support that way of sending emails. Consequently emailing from Harmony only worked for a very few Harmony users.

In Version 7, we have introduced Simple Mail Transport Protocol (SMTP) to send emails so that we not only support the modern email clients like Outlook, but also all the web based clients as well.

The term SMTP sounds a little technical, but it is in fact the way that most emails are sent, either from Outlook Express, Outlook, Hotmail, Gmail and so on. Setting it up is fairly straight forward as long as you know who your Internet Service Provider is, or if you use web mail, what your user id and password is.

Once you enter the SMTP details, Harmony will act like any other Email client, except for one BIG difference. It will only SEND emails, it will not receive them. In the Educator details, there is provision to enter your usual email address. Harmony will send that with any emails as the Reply Address, and if anyone replies or the email bounces, it will appear in your normal email Inbox.

Harmony does keep a record (Email Log) of the emails that you send, but is not privy to any that are replied to.

How to setup the reply address for emails

In order to send emails, Harmony needs the Reply Email address, because Harmony only sends emails, it does not receive them.

Click on Setup, Educator Details
Enter your Email Address and click Save

How to set up the SMTP Server Details in Harmony

Click Setup, Email SMTP Server

First of all you MUST tick Use SMTP Server to send emails

The next 4 fields are the most common;
In 99.99% of cases, you wouldn't want to venture below the password field without advice from someone. They are mainly required if you are connected to a corporate network and still wish to use Harmony to email people.

If you are not sure what to enter
Click Common SMTP Settings
Harmony will list about 30 of the most common email clients and the predefined Host address and Port that they use.

Look for yours, but before you click Select, check to see if the Username and Password are required, and if so, what part is required.

For example, the User Id for Gmail is the bit before the @ in your Gmail address, e.g. Fred_Blogg2@gmail.com the User Id would be Fred_Blogg2
However, Hotmail requires the full email address, so for Fred_Blogg2@hotmail.com the user id would be Fred_Blogg2@hotmail.com

If it says Unknown in the Username, then you will have to experiment, or check out how you setup your email in your normal email client.

Select your Email client

Harmony will automatically enter the Host and Port details

It is up to you to enter your User Name and Password (if it is required)

If you are not sure, the best thing to do is try without it, Click Test Email and see if it works

NB: Harmony will pick up the reply email address from the email you entered when you first completed the registration details.

If it doesn't work, then enter your full email address and your email password and again click Test Email.

Once you get Email Successfully Sent
Click Save and you are ready to email from within Harmony.

WARNING: If, sometime in the future, you change your email address and/or password, don't forget to make the same changes in Harmony as well, otherwise the SMTP server will return an error.

Now to setup the recipients of the emails

Setup Recipient Email Addresses

There are two main types of email recipients, Parents and Other contacts:

Parents

There is provision in each Parent record to enter an email address.
Click Work Centre, Parents, Open the Parent Record
Enter the Parent Email Address and Click Save

Others

You can also setup other non parental contacts such as your scheme contacts or your accountant contacts.

To do non parental email addresses
Click Work Centre, Diary Entries, Address Book
Add new contacts, and as part of their details, enter their email address

Using the New Email facilities

There are three ways to Email out of Harmony:

1   *Email a Report directly from Harmony without having to Save and attach it to an external email. For certain reports, you have the option to Print or Email*
    If you select Email, Harmony will create a PDF copy of the report and will send it to the appropriate recipient.
    When I say appropriate, if the report is for a specific parent, e.g. a Receipt or Fee Estimate, Harmony will automatically send it to the owner of that report.
    NB: In some cases, e.g. Timesheet Invoices, you are able to Tag more than one parent, and Harmony will create an email for each parent and attach that parent's invoice as part of the one process.
    If, however, the report is of a general nature, e.g. an Income and Expenditure Report, Harmony will ask you to select the recipient from a list before it creates the email and attaches the report.

2   *Bulk Email to your parents - Create a special email and optionally include non Harmony attachments.*
    E.g. You might produce your own newsletter or you want to pass on something to all your parents.
    In this case, you would
    Click on reports, Parents, Send Email
    Write the email, Add the Attachments, Click Tag Parents
    Harmony will send the same email to all the tagged recipients

3   *Single Email to one Parent or Contact*
    Work Centre, Parents
    If the parent has an email address, the Email Now button will be active
    Click Email Now and produce a single email (with or without an attachment) to go to that parent only.
    For non parents, Work Centre, Diary Entries, Address Book
   *Highlight the Contact and Select Email Now*

What if parent DOESN'T want reports to be emailed?

In some cases, a parent might want to receive emails from you, but NOT printed reports like receipts, invoices etc. In this case, there is a Tick Box in the Parent record – "Do Not Email reports".

If you tick this, you will be able to email the parent, but Harmony will not auto generate and email Harmony reports for that parent.

What if the Parent DOESN'T have an email address?

If you are using email to send reports to parents with an email address, you obviously need to Print the reports for those that don't. When you select the Print option, there is a secondary option to ONLY print for those that don't have an email address, or those that do, but have requested NOT to receive reports by email.
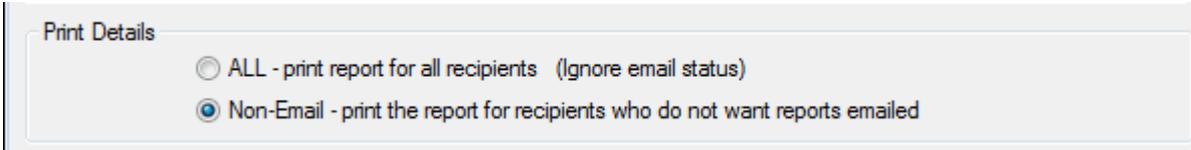
Print Details
- ○ ALL - print report for all recipients   (Ignore email status)
- ● Non-Email - print the report for recipients who do not want reports emailed

Email Logs

Every time you send an email from Harmony, a copy will be stored in the Email Log. You can access the general Email Log by Clicking, Work Centre, Email Log. This will show ALL emails for everyone. However, if you want to check on a specific recipient, e.g. a parent, you can access the Parent list from the Work Centre, Highlight the Parent and then select Email Log. Harmony only displays emails that were sent to that specific parent.

There are only three mail boxes in the Harmony Email system, Outbox, Sent Box and Archive Box.

Outbox

When you are sending Emails, you have the option to not send them immediately, perhaps your Internet connection is down or you want to send them later while you are not working on the computer. If you take that option, emails that are created are stored in the Outbox, ready to be sent later.

In the event that an email cannot be sent for whatever reason, Harmony will save it into the Outbox so that you can deal with it later. You can redirect it somewhere else, delete it and try it later and so on.

Sent Box

This will contain a copy of all successfully sent emails.

NB: Successfully Sent does NOT necessarily mean successfully received. The email journey is both perilous and unpredictable. It is fraught with danger and uncertainty. The most common bandit is the ISP Spam filter, it might deem your very innocent email to be suspicious or dangerous and wham, it's gone without a trace. If it gets past the ISP spam filter, it then has to outwit the recipients antivirus program. Most of the time if it fails this test, it will end up in the recipients Junk Mail folder. In some cases this is like

being cast into the wilderness, never to be seen again, because some people never check their junk mail folders.

I only mention this, because you will receive calls from recipients advising that they didn't get your email. As I said, if it is in the Sent Box, it has been sent, just like dropping the letter into the red mail box on the corner. After that, it is out of your hands.

If there is an issue with the recipients email address, you should receive a reply from the ISP telling you as much. That reply will be in received by your normal email client.

If you wish to empty your Sent box, you are able to Tag and Delete the emails you no longer wish to keep.

NB: Deleting Emails does NOT relinquish the disk space immediately. In order to do that, you should Select Utilities, Compact the Email Log – that will physically remove the deleted emails and give back the disk space that they were occupying.

Archive Box

If you want to keep permanent copies of emails that you have sent, you can Archive them from the Sent Box. That process is quite simple; Tag the email or emails and Click Archive. Harmony will move them to the Archive box

Moving Harmony to another PC

The most common question received by hotline support is
"I have just bought a new computer, how do I get my Harmony onto it?"
Or
"My computer has crashed (or has a virus and needs to rebuilt, how do I re-install my Harmony?"

To understand this process, it is necessary to understand the structure of Harmony.

There are two components, the programs and the data –

1. The data is the MOST important because it is yours, it is unique, it took a lot of time and effort to be created AND if it is lost, the ONLY way back is to do it ALL OVER again.
2. The programs are important to access the data, but you can ALWAYS get the programs from our web site because once you are a registered user, that is your right. You don't have to pay again, because your registration is an on-going license to use Harmony Light for Educators.

So, the process to answer your above two questions is the same:

1. Download the latest version of Harmony Light for Educators from our web site and install it on your new computer or your fixed computer
2. Using your latest Harmony Light Backup, Restore your Data to the new install
   Start up the new install of Harmony Light
   Cancel the First Time User screen

Select Restore Data
Browse and locate the LATEST backup file only
Select and Start Restore

It's THAT simple – unless you don't backup regularly. That's when it starts to get difficult and you spend endless nights doing the same thing you have already done before.

BACKUP, BACKUP, BACKUP

BACKUP

Speaking of Backup, we have made a few changes to the Backup process that will hopefully assist you in that hour of need.

Important Information

1. *Every time you do a Backup, Harmony takes a complete copy of your business database and zips (compresses) it into a manageable size so that it doesn't take up a lot of space on your backup device.*
2. *The Backup process is very quick and quite satisfying once you have completed it*
3. *The simplest Backup Device is the USB removable drive or stick as some of them are called.*
4. *It is NOT a good idea to Backup to your local hard drive C: (see the next topic)*
5. *Harmony will remind you to Backup, DO NOT ignore the reminder*
6. *You should always Backup if you make ANY change to your Harmony data*
   Click on File, Backup Data - follow the prompts

Backup Location Restriction

This year we have had a few incidents whereby clients have been doing their backups as regular as clockwork. So what's the big deal? You might ask. Well, unfortunately, they were backing up to their local c: drive, and when their PC crashed, not only did they lose Harmony, they also lost their backups.

In Version 7, we have made a rule, that you cannot Backup to the same disk drive that Harmony is installed on. If you are not doing this, you will not be affected by this rule, but if you have been doing this, Harmony will NOT let you in until you backup to a different drive.

If this happens to you, go out and buy a USB stick or a removable drive and use it, not only for Harmony, but for all your other valuable data as well.

Support Options

Connect to Technician

If you call Harmony for support, and we think it would be easier to connect to your computer to assist you, we have an option in the Help Menu that will allow us, (with your express permission of course) to connect to your computer via the Internet and more

easily assist you. We can use this feature to help demonstrate features, or assist with Harmony technical issues that you might be having trouble with.

If you select Help, Connect to Technician, your system will create a partial connection and then ask you for a 6 digit code. We generate that code at our end and give it to you over the phone. Once you enter that, you will be directed to download a small applet that will complete the connection process. Once that is complete, our technician will be able to control your mouse and keyboard to assist you directly.

At the end of the session, the connection details are removed from your computer, and the only way for our technician to connect again is to go through the whole permission process with you.

We have been using this feature successfully for a couple of years now, but this is the first time we have added the connection wizard to the Harmony Help menu.

Email Harmony Support

Once you have entered and tested the SMTP email settings, you will be able to email Harmony Support directly from within Harmony, again via the Help Menu. Harmony will create the email, enter our email address and provide a space for you to type in your question. There is also a facility to attach the error log, or any other attachment, for example a screen shot you might have saved.

Emails are generally answered within 24 hours, so if your question is urgent, then:

Call Harmony Support

Telephone support is free of charge, but we do ask you to call us so that we don't incur the cost of the call. In the event, that the issue is of our making, we will, of course, call you back.

Our current support number is 02 6239 2277. It is also published in the User Manual under Introduction, Technical Support.