



SYNERGETIC

# Synergetic.

MODULE OVERVIEW



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# Asset Register Module.

*Full financial management of all assets including depreciation calculations and asset maintenance. Asset acquisitions fully integrated via the creditor's module.*

## Asset Definitions Maintenance

- Assets are grouped according to their coding in the General Ledger and their depreciation rate.

## Assets Maintenance

- Besides being grouped as above, assets can also be assigned to Cost Centres (if the General Ledger Coding does not go to this level), individuals (to identify who might have physical control of the asset) and locations (building or rooms).
- Assets are identified by a description and optionally serial numbers.
- Numbers can be assigned to assets – either when they are physically received by the school, or when the invoice for their purchase is processed.
- The purchase date (or depreciation start date) and cost of the asset is recorded, together with a direct link to the original purchase invoice details.
- While all depreciation calculations are automatically calculated, opening written down values can be adjusted when initially loading data or when revaluations are made.
- The system can calculate the assets written down value as at any date and provide appropriate profit/loss figures for prospective sales.

## Assets Depreciation and Interface

- Assets can be added automatically while entering purchase invoice details thus ensuring that control accounts correctly agree with the Asset Register.
- Depreciation can be automatically calculated on a periodic basis – automatically creating appropriate journal entries in the General Ledger.

## Asset Listings

- Asset lists and schedules for accounting controls can be printed by the system.

# Class Charges Module.

*Synergetic integrated class charges module allows any classes, academic, music, co curriculum to be setup to allow automated charging to students.*

## Class Charges Maintenance

- The class record can record a default number of lessons that students will take for a term or semester (period), together with a Debtors Fee Code that can record the amount that is to be charged for each lesson.
- Students can be allocated to classes, either automatically from a separate timetabling program, in bulk according to some other class or student group that they belong to, or individually.

## Student Classes Maintenance

- If an individual student is to be charged for additional lessons, or they commence the class after it has been initially charged for the period, then the number of lessons that are to be separately charged can be recorded.
- If an individual student exits a class before the end of the period, or classes were not held for some reason, and they are eligible for a refund for the classes that they did not take, then the number of lessons that they are to be refunded for can be recorded.

## Student Class Charges

- Class lessons can be charged to students either at the start of the period for all lessons to be held or during the term or semester for lessons actually taken.
- If lessons are charged at the start of the period then adjustments can be made and charged (or refunded) during the period.

# Community Portal Module.

*The Community Portal is designed for Parents and Students to access relevant Synergetic information over the internet. Works with all major internet browsers, IE, Safari, Chrome, Firefox. This application has an abundance of configuration options to alter the appearance to suit your school requirements.*

## Introductory Page

- Post custom welcome messages to the user

## Results

- View students assessment results
- View/Print a PDF copy of the assessment reports
- Email class Teachers

## Timetable

- Displays current day and weekly class timetable
- Ability to select any particular days timetable

## Finance

- Displays account summary
  - Total Owing/Overdue
  - Charges not yet notified
- Receipt History and ability to reprint prior receipts
- Statement History and ability to reprint prior statements

## Absences / Attendances

- Display basic attendance or absence information
- Show advanced matrix of attendances for entire term or semester with dynamic link to absence codes

## Interviews

- Allow users to book and modify Parent/Teacher interviews
- Print booked appointments
- Email class Teachers

## Docs

- Ability for users to download documents, e.g. Upcoming event notifications

## Contact Us

- Contact information for all Staff relating to students
  - Configurable options to display phone number and/or email
- Ability to display additional non-teaching contacts

## My Account

- Fully customisable to give users the ability to request updates to their information. You choose what information to allow users to request changes to.

# Creditors Module.

*Creditors module is designed to minimize the time required to enter supplier details, create invoices, set payment secludes, set authorization levels and is fully integrated with the general ledger, to manage department budgets.*

## Supplier details

- Any person or company can be recorded as a supplier to the school. The supplier's name and address is checked against and recorded on the school's main Community database.
- Can be allocated to categories (eg canteen or IT supplier) and be recorded as an "Approved Supplier" id required.
- ABN and GST registered details can be recorded for tax auditing purposes. Payment terms can be defined.
- Default method of payment (Cheque or EFT) can be recorded, together with the payment notification method (Remittance Advice, Email, Fax).
- Alert message can be displayed whenever invoices are to be entered for a specific supplier (eg "payments held until credit received").
- Default tax codes can be set, default to GL code

## Invoice Entry

- Easy method of entering individual invoices, keyboard short cuts. Allows entry of invoices to be paid immediately, invoices to be paid on a later due date and invoices that have already been paid (including direct debits to the school's account).
- Can automatically copy supplier information where multiple invoices are to be processed from the same supplier.
- Invoice can be send over to debtors
- Automatically checks whether the invoice number has been previously entered for the supplier.
- Free format invoice description allowed wherever an invoice number is not supplied.
- Due dates can have a variety of defaults, but can be overridden if required.
- Simple allocation against originating purchase order (if Purchase Orders module is installed).
- Integrated recording of Asset details (if Asset Register module installed).
- Integrated receipting of stock (if Sales – Inventory Control module installed).

# Payments

- Individual invoices can be selected or deselected from payment. All invoices due for payment on or before a selected date can be automatically selected for payment. Any automatic selection can be cancelled if required.
- Due dates or payment methods can be changed at any time before payment is made.
- Cheques print on A4 single sheet stationery as a combined Remittance Advice and Cheque (almost all formats can be accommodated, but may require additional stationery set up cost).
- EFT payments produce a standard ABA banking file and can be notified to suppliers by a standalone remittance advice, email or fax (subject to appropriate set up on the school's network).

# Reports

- An aged invoices outstanding list can be printed at any time.
- A listing of supplier balances as at a previous date can be printed at any time.
- Creditors Trail Balance, plus many more



# Debtors Module.

*The Debtors module allows for the recording all of the relevant information pertaining to parents, companies and students who owe money. Many different options are available to facilitate creation, modification and processing of various fees and discounts against the debtors.*

## Key Features

Full automation of billing runs, emailing of debtor statement invoices and reminder notices.  
Automatic payment processing including receipting and bank file creations.

### Family accounts

- Any person or company can be recorded as the debtor responsible for the payment of a student's fees. The debtor's name and address is checked against and recorded on the school's main Community database. Can use
- home or business address for mailing statements. Allows spouse to be included or excluded on the liability for the account.
- Allows split billing of all, or a specified percentage, of particular categories of charges (categories can be defined by the school).
- Different debtor groups can be set up where statements or balance listings are to be processed at different times.
- A single account can be prepared for a family, or individual students can have a separate account printed.
- Recording of arrangements allowing for exclusion of overdue letters processing
- Correspondence tab, save all emails drag and drop from outlook.

### Fee schedule

- The fee schedule defines the billable activities of the school, recording default values and links to general ledger allocations.
- Certain fees can be linked to specified populations within the school. For example students in Year 8, Boarders, Full Fee Paying students. Also sibling discounts, based on number of children in the family or position of child within the family, can usually be set up to be automatically applied when tuition fees are charged.
- Installment plans, elect you installment frequency's, termly, monthly yearly etc.

## **Charges**

- Easy manual entry of charges to individual students.
- Bulk charging of all students meeting selected criteria (eg all students in year 8). Individual students can easily be excluded from the charge list.
- Automatic charging of all tuition related fees based on the fee schedule rules. Including automatic processing of scholarships and other fee credits.
- Automated the charging of student's sessional classes and transportation fees.
- Online payment options using NAB online gateway (any bank can be used)
- Record history of communication with debtors
- View when invoices are viewed on community portal.

## **Payments**

- Easy manual entry of individual payments. Includes the printing of appropriate bank deposit forms when the posting is closed off.
- Receipts can be printed as the payment is processed or later if required.
- Bpay and phone banking payments can be automatically processed (selected banks only).
- Direct debit arrangements can be recorded against individual debtors and periodically processed including the automatic creation of the appropriate electronic banking file.
- Enrolment deposit recording and repayment process option to credit debtor accounts.

## **Overdue account control**

- Statements for selected accounts, accounts in a selected group or all accounts can be processed at any time.
- Ageing of the accounts is based on the date that the statement was printed (not on an end of period close off typical of other systems).
- Overdue letters can be automatically prepared, allowing for any arrangements that have been made with individual debtors.
- Automation of overdue charges processing
- Debtor's balances can be aged using days or months with the periods being configurable

# Development Module.

## Appeal Management

### Development Maintenance

- All records in the school Community database are available in the Development maintenance application.
- Comprehensive search facilities are provided to assist in locating specific sets of records – based on prior gifts of donors, status of prospective donors, attendance of individuals at events or their receipt of communications.
- Individuals can be searched for by name, previous name, known name at school, names that sound like a certain word (where spelling is uncertain), contents of biographies and other notes.
- Records are presented to the operator in a split screen mode containing individuals on one side and their spouse details on the other.
- A comprehensive profile about any member of the school's Community can be printed – showing details of that person's relationship with the school and their relationship to other Community members. A relationship tree can be produced which allows easy access to any related records.

### Appeal Management and Prospect Tracking.

- Appeals can be managed according to the school's needs
- Important information about the potential for individuals or companies to contribute to an appeal can be recorded and set as targets
- Volunteers and/or permanent staff can be attached to individual donors to ensure that their personal needs as a school supporter are being met.
- All activities associated with the prospecting of individual donations can be recorded and reviewed by relevant staff.
- Relevant staff can be provided with details of prospects requiring a follow up action by a particular date.
- Summary data can be printed about the appeal, including comparisons with targets and graphical presentations.

# Gift Management

## Development Maintenance

- All records in the school Community database are available in the Development maintenance application.
- Comprehensive search facilities are provided to assist in locating specific sets of records – based on prior gifts of donors, status of prospective donors, attendance of individuals at events or their receipt of communications.
- Individuals can be searched for by name, previous name, known name at school, names that sound like a certain word (where spelling is uncertain), contents of biographies and other notes.
- Records are presented to the operator in a split screen mode containing individuals on one side and their spouse details on the other.
- A comprehensive profile about any member of the school's Community can be printed – showing details of that person's relationship with the school and their relationship to other Community members. A relationship tree can be produced which allows easy access to any related records.

## Donations and Giving Histories

- Pledges of future giving can be recorded with details of when receipts are due. Letters can be issued to all donors reminding them of their donation promise and providing a remittance slip.
- This would usually be done in the month prior to the receipt being due.
  - Receipts against pledges automatically update the pledge record with the payment amount and the next payment details. These can be amended if the donor has indicated a change to their payment plan on their remittance.
- Pledges and receipts can be linked to Funds for tax deductibility and/or donor preferences. They can also be linked to Appeals for appeal management purposes.
- Receipts can be processed against pledges or processed as casual giving (eg Annual Giving programs).
- All receipts can be banked using the Synergetic banking software which automatically provides Bank Deposit lists, Audit lists and updates the financial accounts. At the same time the donor records are also updated.
- Pledges and receipts can be assigned to individuals, couples (as a joint donation) or companies.
- The level of giving is calculated by the system (with pledges and actual gifts given different weighting if required) to automatically assign Community members to different levels within a school Foundation structure.

# Excursion Management Module.

*Available on SynWeb, the Excursion Management Module provides a complete workflow for planning excursions facilitating communication within the school and relevant community members.*

- Staff, Student ratios clearly displayed
- Workflow can include organisers as well as supervising staff
- Select attendees from new or existing groups, for example current classes, music group, etc.
- Includes any alerts for the students
- Notification for parents for approvals and/or payment and the ability to send reminders
- Information page for relevant people on the Community Portal
- Risk management including pre-determined actions
- School determined approval process

# Events, Functions and Communication Module.

## Events Maintenance

- Any event provided by the school can be managed with this application.
- Each event is coded - usually consisting of a code for the department or area of the school running the event, the year (and month if held more than once per year), and by a short code for the event itself.
- The event details show the date and venue and can also such things as RSVP dates, table numbers, prices etc.
- When an event is set up you can optionally record against the event all people that are to be invited. You can invite all people who were invited to, or attended an earlier event if required.

## Events letters, labels and lists

- The event invitee list can be used to produce invitations or they can be sent directly to individuals or groups or people based on their dealings with the school (note this may require use of the Communications module).
- When replies are received the people are recorded as either attending or not attending. If all invitees were originally recorded then follow up letters or emails can be sent to those people who have not yet responded.
- Name tags, labels and lists of attendees etc can be produced by the system.

## Communications

- Communications are used in situations where a group of people are required to be contacted. This contact may be in the form of either a postal communication (letter) or via electronic mail (email).
- Bulk communications by constituencies, tailored to suit and managing multiple constituency memberships
- Provides a rich history of communications

# General Ledger.

*The Synergetic General Leger structure supports multiple layers to aid diverse reporting requirements, GL Codes, Chart of accounts, Cost Centers, Divisions, Sub allocation codes, Departmental budgets and in-depth reporting.*

## General Ledger Accounts

- The General Ledger consists of individual accounts that can be posted to in the financial system.
- Each account can have up to 3 budget amounts recorded for each month of the year. Usually one budget amount is used as the working budget and it is copied as the approved budget when it is approved by council. Modifications to the working budget can then be recorded during the year as unavoidable alterations become necessary.
- General Ledger account codes can be any combination of numbers, letters or the dash or period symbols up to 15 characters in length. Many set ups use a combination of a Chart of Account code (being a type of income, expense, asset or liability) and a Cost Centre code (for which area within the school is responsible for financial transaction). Where this scenario is used the system provides a Chart of Account and a Cost Centre maintenance facility to automatically create the appropriate General Ledger codes required.
- Whether or not the General Ledger code has the Cost Centre code as part of it, a Cost Centre can be recorded against any General Ledger code. This code is used as the basis of Departmental Reporting facilities in the system.
- If the Chart of Account code is included as part of the General Ledger code the General Ledger trial balance can be summarised by this code.
- Although a sensible set up of account codes to be used will assist when finding the appropriate allocation for postings it is not a requirement. Whenever there is a need to enter a General Ledger code the system allows you to search for accounts containing the description that you enter. A comprehensive financial reporting facility also allows you to summarise and re-sequence the accounts that you use in to a report that is meaningful to the audience that it is prepared for

## Journal Entry

- Most journals will originate from the sub-ledgers existing in the system (Creditors, Debtors Payroll etc). A separate journal entry program is also provided to enable transfer between accounts, accruals etc.
- A drop down list of available codes and the search facility allow you to easily find the account codes if they are not on the source document.
- Any posting can also be allocated to a sub allocation. Sub-allocations can be set up against any account code.
- One sub-allocation code can be used across more than one account code if required. The sub-allocation code can be used to group items together in a report without the need to set up separate account codes. They can be useful for recording expenses and/or income for one-off events such as specific excursions, or could be used to group together all sorts of expense items to do with a special project at the school. Sub-allocations do not normally have associated budgets otherwise separate account codes should be created.

## Financial Reports

A standard Trial Balance report is provided, with selections to enable a simple Profit and Loss report to be obtained. A comprehensive Finance Report facility allows meaningful reports to be created for almost any purpose.



# Human Resources Module.

*The Human Resources module has in-depth functionality to manage your human resource requirements and integrates seamlessly with the other synergetic modules.*

## Key Features:

### Detailed

- Staff Contact records, Photos, School information (campus, House, Staff Code etc.)
- Define Award levels, Job Positions, report to Positions
- Staff medical records, including consents, immunisation status, allergies, asthma details, injuries and medical incidents. Doctor's contact details. Emergency contact details.
- Next of kin details, either as emergency contacts or as relationships.
- Staff vehicle and parking space details.
- Results of reference checks and police record checks, and probation date details.
- Confidential comments.
- Staff appraisal record, including dates, interviewer details and targets set.
- Professional development history, including courses attended, course dates, course venue, course details, course costs, course outcomes and qualifications obtained. The professional development history can be linked to the staff member's appraisal record if required.
- Qualification details, including the organisation they graduated from, their major and minor areas of study and their attainments.
- Vacancies and staff review notifications.
- Skills and learning areas. For example, a staff member might have basic first aid skills or skills in a particular learning area. The staff learning area information is used to aid the daily organiser for staff substitutions in Synergetic.
- Job positions, including position category, position overview, records of past and current staff members for that position, total full-time equivalent (FTE) for the position and count of FTE currently appointed to the position.
- Room key records, including details of the rooms opened with the key and community members who currently hold a copy of the key

## Flexible access

Give some staff full access to staff records (e.g. HR staff) and limited access to other staff (e.g. Staff supervisors may just have access to P.D. and school-based information).

## Reporting

Obtain staff listings, staff census information, qualification lists and more.

## Integrated

With the timetabling, staff scheduling, students, PTI, payroll (for leave) modules.

## Online

Staff Kiosk accessible via any computer browser, i.e. Chrome, IE, Safari, and Firefox.

# Objects Bookings Module.

***THE OBJECT BOOKINGS MODULE ALLOWS USERS TO BOOK SCHOOL RESOURCES SUCH AS ROOMS, EQUIPMENT, CLASS SETS OF BOOKS AND VEHICLES.***

Users can book resources by period or over a range of dates. The module allows the school to control which types of objects a given staff member can book. Resources can also be loaned out to users (for example when a car or piece of equipment is picked up) based on a pre-existing booking or on an ad-hoc basis

# Past Students Module.

*Synergetic past student allows your school to effortless manage all you alumni/ past students details. Seamless integration with the fundraising and development module.*

## Creating a Past Student record

- Past Student records are created for all students who leave the school.
- All of the student's history while they attended the school are retained.
- All records can be transferred back to their current student record at any time.

## Past Student Details

- Details of the student's final year of study, including Year Left, final Year Level, Form, House etc are stored.
- The peer year is calculated as a means of grouping students together for reunions or other activities.
- The student's known names at school, including preferred names and maiden name for girls are stored and can be used in search criteria or printed out on reunion listings.
- The student's contact details and relationships are stored.

## Past Student Association

- Details of the student's membership of the past students association are recorded.
- Past students can be grouped in to branches to assist in maintaining contact among students who live in more distant locations.
- Additional groups can be organised by allocating a constituency for the group to the individuals belonging to it, or by setting up specific User Forms for this purpose.

## Reports

- Standard contact lists and labels are provided.
- A special report that lists the last known addresses of student's whose addresses have been lost can be used to selectively search for current valid contact information if required.
- Another report, useful at reunions, shows the details of all students in the group, with their known names at school. This listing can serve as a reminder for attendees to get back in touch with some past friends.

## Communications

- A separate communications module in Synergetic allows you to build up a list of past students that you wish to contact (eg all those with a Peer Year in the 90's). This list can then be used as a source for a form letter or used to email the individuals.

# Pastoral Care Module.

*The Pastoral Care provides you with the ability, to record and track the pastoral care information within your organisation.*

*Pastoral Care incidents can be student's notes, merits/ demerits and incidents types.*

## Key Features:

- Pastoral Care can be accessed via the Synergetic Web application, via any of the major web browsers, i.e. Internet Explorer, Chrome, Safari and Firefox
- Create School specific incidents, infringements, category's and codes
- Notify Contacts via email or SMS
- Record public and private details, mark confidential
- Create follow up procedurals and actions with dates
- Link documents to the pastoral care items
- Add/edit comment against an item
- Duplication Tab, allows the incidents to be duplicated against other selected students
- Records created and modified dates and time for each Pastoral care item

## Filters:

- In depth filters to find Pastoral care items for specific year groups/tutors/forms/classes
- Identify, unread entries by Tutor/Form House teacher or year level coordinator
- Filter by any date range
- Identify unread comments
- Display total number of incidents per student

# Payroll Module.

*Synergetic provide a fully integrated Single Touch Payroll (STP) compliant payroll module, with powerful flexible features designed to meet your payroll requirements.*

## Employee details

- The employee's name and address is recorded on the school's main Community database, but employment details are stored in the separate finance database and can have special security enabled.
- Category can be used to group employees for report printing purposes (especially useful to define pay slip distribution points).
- Pay Group allows employees paid at the same time to be processed together.
- Employment Status can be used to prevent casuals from being automatically included when a new pay is prepared and can assist in determining leave entitlements.
- Record tax file number, tax scale, HECS contribution flag, rebate amount for tax calculation purposes.
- Set up payments to any number of bank accounts if required. Split payment across different accounts.
- Record standard pay details linked to industry award amounts (on the Pay Code file) if applicable.
- Record FTE for part time employees (and history if changes if required) – as the basis for their leave calculations.
- Record award code in order to determine leave entitlements
- Record leave details as used.

## Process pays

- The standard pay details of selected employees are copied to a current pay area where they can be amended to reflect special situations for the current pay period.
- A detailed payroll journal and a concise payroll audit report can be printed for the pay to be processed. The payroll audit shows changes from the last pay and a summary of amounts to be paid and taken up as school expenses.
- Employees can be paid by cheque or EFT. A standard ABA banking file is prepared for EFT payments.
- Payslips can be printed on secure stationery.
- Other reports can be prepared as required.

- Once the pay has been completed it can be updated, which will process journals to the General Ledger.

## Superannuation

- Different types of employee and employer superannuation contributions can be set up in the system.
- Each type of superannuation contribution can be directed to appear on a report specific to the fund and on a column of the report that identifies the type of contribution being made (SGC, Salary Sacrifice, Employee etc)
- A separate clearing account can be set up for each type of superannuation contribution and, in addition, employer contributions have an expense account identified.
- The superannuation payments for low income earners can be processed using a special end of month routine.

## Human Resources

A separate module in Synergetic links together employee records, staff records and includes other information specific to the Human Resources area.



# Purchase Orders Module.

*The Purchase Orders module allows the preparation of a purchase order to be sent to a supplier and control of those orders that are outstanding. Optionally the system allows for source departments to originate a purchase requisition that can then be authorised, printed and sent to the supplier by an authorised person.*

Ability to set thresholds and enforce budget spending across departments, one or two level authorisation is configurable for each defined business unit/department. Automatic email generation to purchase orders users and supplier once a purchase order is approved. Ultimately speeds up invoice entry processing, removes need for printing throughout the approval process and optional automatic receiving of goods on invoice entry.

## Purchase Order format

- You can elect to print on letterhead or print using the name, address and phone number of the school and/or Business Unit on blank paper.
- You can select how many copies are required when an order is printed and what each copy is labelled as (eg Supplier copy, Department copy etc.).
- Different ranges of order numbers can be set up for different Business Units.

## Purchase Order Entry

- The supplier can be selected from the current list of suppliers or a new one can be created as you enter the order.
- Besides entering general details concerning the order, each item can be described and costed if required.
- If Purchase Orders are used in a Business Unit that sells the items that they purchase, then they can define the stock's item code on each line of the order.
- If you are permitted to do so you can authorise and print an order, otherwise this will be an order requisition only which must be authorised by another person.

- If Business Units (or departments) can only produce order requisitions then the authorising officer must display each requisition for authorisation and printing (or email).
- Save and come back to
- Assign date in advance, so not to run out of budget
- Email Purchase Orders

## Purchase Order printing

- Purchase Orders are usually printed on A4 stationery which can be letterhead or printed by the system. Optionally the Purchase Order can be faxed if appropriate software is installed on your computer or network.

## Purchase Order receipting

- Purchase Orders can be manually receipted or their receipt can be automated with the processing of the suppliers invoice for the goods (using Creditors Invoice Entry)

# Sales – Core Module.

*Provides the ability to process sales that will be charged to a debtors account. Cash, cheque and credit cards can also be processed by this module, but these type of sales are merely posted to a special debtor account and the cash, cheques and credit cards must be separately banked using the Synergetic banking software. An add-on module allows the Point of Sale processing of cash, cheques and credit cards (see Sales Advanced POS add-on available separately).*

## Item Maintenance

- Items that are available to be sold by the school can be recorded with a description, barcode and unit of measure.
- Any item can be stocked by any of the Business Units that are run by the school. A Business Unit can be described as a part of the school that controls their own stock. The Sales module provides for one Business Unit. Additional Business Units must be purchased separately if required.
- If an item is stocked by more than one Business Unit, then each can have different prices if required.
- An add-on module allows for the updating of stock on hand and cost of stock figures (see Sales-Inventory Control add-on available separately).
- A further add-on module allows for individual items of stock (i.e. second hand clothing) to be recorded against the supplier of that item (usually a parent). When the item is sold then the supplier is paid for the goods (see Sales-Consignment Stock available separately).

## Sales Entry

- Students can be identified by scanning a barcode on their identity card or by manually searching for them on the system.
- While the charge usually will go to their debtor (parent's) account the operator can select that the payment will be made immediately by cash, cheque or credit card. If this is done the charge is actually made to a special debtor account and the cash, cheque or credit card must be separately banked using the Synergetic banking software (see Debtors module).
- The item(s) that the student is purchasing can either be scanned or entered by code or through manually searching for the item on the system.

- If scanning is used then the sale can normally be completely processed just using the scanner, except for the pressing of a function key to indicate that the sale is complete.
- Dockets can be printed at the time of the sale, or the details of the sale can be printed later on the Debtor's statement.
- Internal department sales can be accommodated by the system. Such sales can be automatically posted to an appropriate General Ledger code and have the identity of the staff member purchasing the item recorded. GST is automatically deducted from these General Ledger sales.

## Sales Charges

- Sales are not charged to the debtors account until an appropriate point in time. If only debtor sales are made then this may be at the end of the term just prior to printing statements. Otherwise it may be each day.
- General Ledger sales can be separately posted to the department's accounts. This would normally be done on a monthly basis, but can also be daily if required.

# Sales – Inventory Control Add-on Module.

*The Sales-Core module allows you to create an item of stock and sell units of that item. The Inventory Control add-on allows for the recording of item receipts, together with the details of the supplier of the items. If required, you can automatically add new stock at the same time that you are processing the supplier's invoice. The Inventory Control module provides for the automatic updating of the weighted average cost of each item of stock.*

*Optionally you can also have the Stock Control account in your Balance Sheet and the Cost of Sales in your Profit and Loss report automatically updated when any items are sold.*

## Item Maintenance

- Items that are available to be sold by the school can be recorded with a description, barcode and unit of measure.
- Any item can be stocked by any of the Business Units that are run by the school. A Business Unit can be described as a part of the school that controls their own stock. The Sales module provides for one Business Unit. Additional Business Units must be purchased separately if required.
- If an item is stocked by more than one Business Unit, then each can have different prices if required.
- This add-on module allows for the updating of stock on hand and cost of stock figures.
- A further add-on module allows for individual items of stock (i.e. second hand clothing) to be recorded against the supplier of that item (usually a parent). When the item is sold then the supplier is paid for the goods (see Sales-Consignment Stock available separately).

## Sales Entry

- The item(s) that the student is purchasing can either be scanned or entered by code or through manually searching for the item on the system.
- When items are sold their cost is recorded against the sale and can be used to automatically update stock accounts in the General Ledger (during the Sale Charges process).

## Stock report

- Details of each item of stock with units on hand, unit cost and extended cost, printed by category and with the option to print a single category only can be printed at any time. These listings can be used as an aid to stock taking and subsequent adjustments if needed.

# Staff Kiosk Module.

*The Synergetic Staff Kiosk module within SynWeb allows staff to view their personal details and provides access to leave information, personal development records (and requests), timesheets and payslips.*

- Modifiable staff personal information tab: name, address, contact information, emergency contacts
- Staff details, department, teacher registration numbers, working with children check and associated expiry dates
- Modifiable staff car details (make models, registration) allocated parking space number
- Modifiable staff skills area, levels, attained dates, expiry comments
- Qualification details, including the organisation graduated from, major and minor areas of study and attainments received
- Emergency contacts
- Medical details & conditions, doctors
- International staff (country, passport & visa details)

## Leave

- Leave entitlements
- Leave taken

## Professional Development

- Apply for professional development, edit & delete
- Professional development details, course title, status, application date, start date, categories, providers, training reasons, venue, presenter, registration, travel outcomes
- View PD application status: approve, complete, decline

## Payslips

- Filter date ranges to view, print & download personal payslips

## Timesheets & Workflow

- Manage timesheets, submit for approval
- Record date, start time, breaks, total hours, pays code, comments
- View timesheet status: pending, submitted

## Bank Details

- View personal bank details



# Synergetic E- Payment Gateway.

*Synergetic offers secure credit card payment processing via Nab E Payment gateway, allowing your community to securely make payments or donations online via their community portal.*

- Allow community members to pay any school fees online
- Make donation online to any funds or appeals created by the school
- Store credit cards numbers within Nab secure gateway
- Create Events and Excursions allow Payments online
- Low Education rate merchant fees

# SynWeb Application.

*The Synergetic feature rich Web application (SynWeb) is a platform-independent interface designed for staff access. SynWeb can be run from your schools Intranet or Internet the layout and content can be customised to meet your school requirements.*

**The following list of modules is currently available through SynWeb:**

- Students
  - Student Maintenance
  - Attendance Maintenance
  - Absence Events Maintenance
  - Pastoral Care Maintenance
  - Study Period Maintenance
  - WhereIs Student
  - Unaccounted Students
  - Class Maintenance
  - Course Maintenance
- Curriculum
  - Results Maintenance - Enter, view and generate student reports
  - 'Smart' Class allocations
  - Course Maintenance
  - Assessment Area Maintenance
  - Learning Area Maintenance
- Staff Maintenance
  - Substitutions
    - Organise replacement staff for timetabled classes
    - Book an alternate room for the class
    - Email substitute teacher with class, students, room, and additional information
  - Staff Kiosk
  - Staff Schedule
  - Timesheet Entry
- Finance
  - General Ledger access (for Department Heads)
  - Purchase Order entry
- Objects - Manage and book objects (rooms/equipment) by date and/or period
- Accommodation- View and book accommodation through wizards and a calendar interface
- Reports - Print a range of Crystal Reports

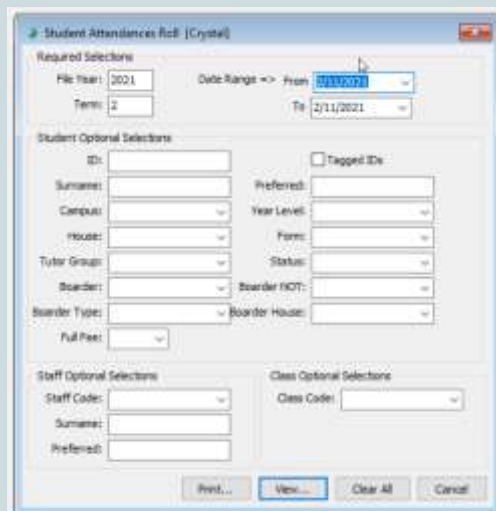
# Crystal Reports.

*There is a rich library of reports currently available in Synergetic with many of these created using Crystal Reports. Crystal Reports allow authorized users to customize existing reports and extend their library by building new reports to suit their individual needs. Custom reports can be created, either by commissioning Professional Services or created by staff in the school themselves.*

To support the creation, maintenance and editing of crystal reports, Education Horizons runs a two-day workshop that provides a comprehensive overview of the Crystal Report program, its basic features and involves interactive participation.

Ownership of any custom Crystal Reports lies with the school developing them.

When running a Crystal Report, users are provided with parameters to select which are then used to populate the reports.

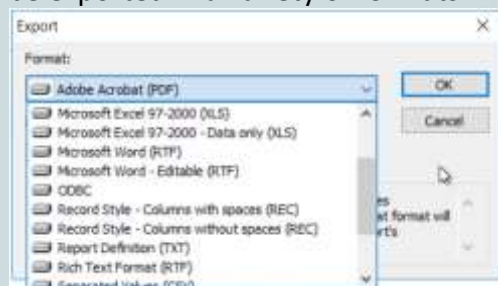


The screenshot shows a dialog box titled "Student Attendances Roll [Crystal]". It is divided into several sections for parameter selection:

- Required Selections:** Includes "File Year" (set to 2021), "Date Range" (From: 2/1/2021, To: 2/11/2021), and "Term" (set to 2).
- Student Optional Selections:** Includes fields for "ID", "Surnames", "Campus", "House", "Tutor Group", "Boarder", "Boarder Type", "Full Fee", "Preferred", "Year Level", "Form", "Status", "Boarder FIC", and "Boarder House". There is also a "Tagged ID" checkbox.
- Staff Optional Selections:** Includes "Staff Code" and "Surnames".
- Class Optional Selections:** Includes "Class Code".

Buttons at the bottom include "Print...", "View...", "Clear All", and "Cancel".

The resultant report can then be exported in a variety of formats.



The screenshot shows an "Export" dialog box with a list of file formats. The "Format" dropdown is currently set to "Adobe Acrobat (PDF)". Other visible options include:

- Microsoft Excel 97-2000 (XLS)
- Microsoft Excel 97-2000 - Data only (XLS)
- Microsoft Word (RTF)
- Microsoft Word - Editable (RTF)
- ODBC
- Record Style - Columns with spaces (REC)
- Record Style - Columns without spaces (REC)
- Report Definition (TXT)
- Rich Text Format (RTF)
- Separated Values (CSV)

Buttons for "OK" and "Cancel" are visible on the right side of the dialog.



SYNERGETIC