Sending Blocks, Events and Rentals to history

Individual Blocks (summer camp for most camps)

STEP ONE: Checking what people owe you or you owe them.
Do any churches/organizations or campers owe you money or do you owe any refunds for last summer?

If yes then:

Get a hard copy of what each organization/person owes you.

1. Make sure no one is using the tick
2. Go to Custom Report Manager
3. Click on New Report
4. Select "Contact Information" as the data source
5. Refresh the data
6. Pick "tick records" as the type of report
7. click next
8. Filter where "balance" "is not equal to" "o"
9. Click Finish
10. Dialog box will ask you if you want "xx number" of records to be ticked. Click yes
11. Dialog box asks if you want to untick all the records first. Click Yes
12. Dialog box comes up that says it's finished. Click ok
13. Dialog box asks if you want to save this report. (I don't save this one cause it is so simple but you can save it if you want.
14. Then click close/cancel
15. Close the Report Manager
16. In the Main Switchboard go to Reports>Transaction Reports on the right pick Batch Transaction Statements
17. Dialog box comes up. Check "only ticked records" and then preview
18. Print out these statements and verify they are accurate. Make any modification and then go to Step Two.

If no then:

Go to Step Two.

STEP TWO: backing up your database
This step will back up your data base by compacting the database and putting a copy of your current database in the same folder with the name: "yearmonthdatenumbers"ctmain_b.

1. In the Main Switchboard go to Administration. On the right pick Compact Data base.
2. Dialog box will come up asking you to get everyone out of CampTrak. Once everyone is out of CampTrak then click ok.
3. Your data base will then be backed up. If, for some reason the data did not go to history the way you expected you can use the back up by deleting the ctmain_b file and erasing the numbers at the front of the "yearmonthdatenumbers"ctmain_b so it just says ctmain-b by renaming it. This will put all the data back to exactly the same way it was before you compacted
4. Go to step Three

(do not do any of the following without backing up your database – see step two)

STEP THREE: Sending transactions to history that are not associated with a block or a group event
This step will move any transactions that are not connected to a block or a group event to history.

1. In the Main Switchboard go to Administration>History Conversion/Delete Records. On the right pick Transaction History Conversion.
2. A dialog box comes up reminding you this is irreversible. If you did step two then click ok.

3. Go to step four

STEP FOUR: Making accounts receivables

For any campers that owe you money, this step will create an accounts receivable credit connected to the block and an accounts receivable debit not connected to a block for the amount the camper owes you. This will NOT make an accounts receivable for any organizations with third party transactions.

1. In the Main Switchboard go to Individual Events>Setup. On the right pick Move Block Balances to Accounts Receivable
2. A dialog box will come up asking you if you are sure. Click yes if you are sure.
3. Go to step five.

STEP FIVE: Moving the blocks to history

This step will move the registrations and transactions that are connected to each block to history.

1. In the Main Switchboard go to Individual Events>Setup. On the right pick Registration History Conversion
2. A dialog box comes up with the list of blocks. Choose which blocks you want to move to history. (I like to move just a few at a time so I know it is doing something. It takes a while to move them.) Click close when you are finished moving them to history.
3. Push F12 to make sure that you didn't skip one. (don't forget to refresh) If you did go back to step five part 2 and repeat until you have moved all to history.
4. Spot check a few campers and make sure they moved to history the way you wanted.
5. If they did go to step six, if they didn't you can go back to your back up (see step two part 3)

STEP SIX: Final Touches

1. Check the statements you ran in step one against what is in CampTrak. Add transactions to the church/organizations as needed
2. You can now set up next summer's blocks, dates etc.

Sending Group Events and Group Rentals to history

STEP ONE: Backing up your data base

This step will back up your data base by compacting the database and putting a copy of your current database in the same folder with the name: "yearmonthdatenumbers"ctmain_b.

1. In the Main Switchboard go to Administration. On the right pick Compact Data base.
2. Dialog box will come up asking you to get everyone out of CampTrak. Once everyone is out of CampTrak then click ok.
3. Your data base will then be backed up. If, for some reason the data did not go to history the way you expected you can use the back up by deleting the ctmain_b file and erasing the numbers at the front of the "yearmonthdatenumbers"ctmain_b so it just says ctmain-b by renaming it. This will put all the data back to exactly the same way it was before you compacted
4. Go to step Two

STEP TWO: Sending Group Events and Group Rentals to history

This step will send group events and group rentals to history one at a time. I recommend sending them to history after they book the next year and they have paid all they owe. The information does not disappear. You can still get the data from many different data sources in the Custom Report Manager

1. In the Main Switchboard go to Group Rentals. On the right pick Group Rental/Event History Conversion.
2. A dialog box will come up. You can send each group event or group rental and to history using this box.