

Chapter 3

Entering Lookup Lists

You will find that throughout T.O.M. you are offered several drop-down list boxes that allow you to lookup various codes. You use these codes to classify things like your employees and your vehicles or to specify key information for your field trips like the billing rate or the fund. These drop-down lists are actually defined by you.

Before you can use T.O.M. you must set up these lists that tell the system how you want it to work for you. In some of these lists you do more than just enter category information, you also enter values to be used in calculations. In your billing rates, for example, you enter an hourly and a mileage rate. In your vehicle types you assign various capacities that are used to calculate the number of vehicles required for a field trip.

To access the various lookup list routines open the File menu, then click Other (Figure 3-1). Click the lookup list you wish to access, such as Vehicle Types. That screen will be displayed.

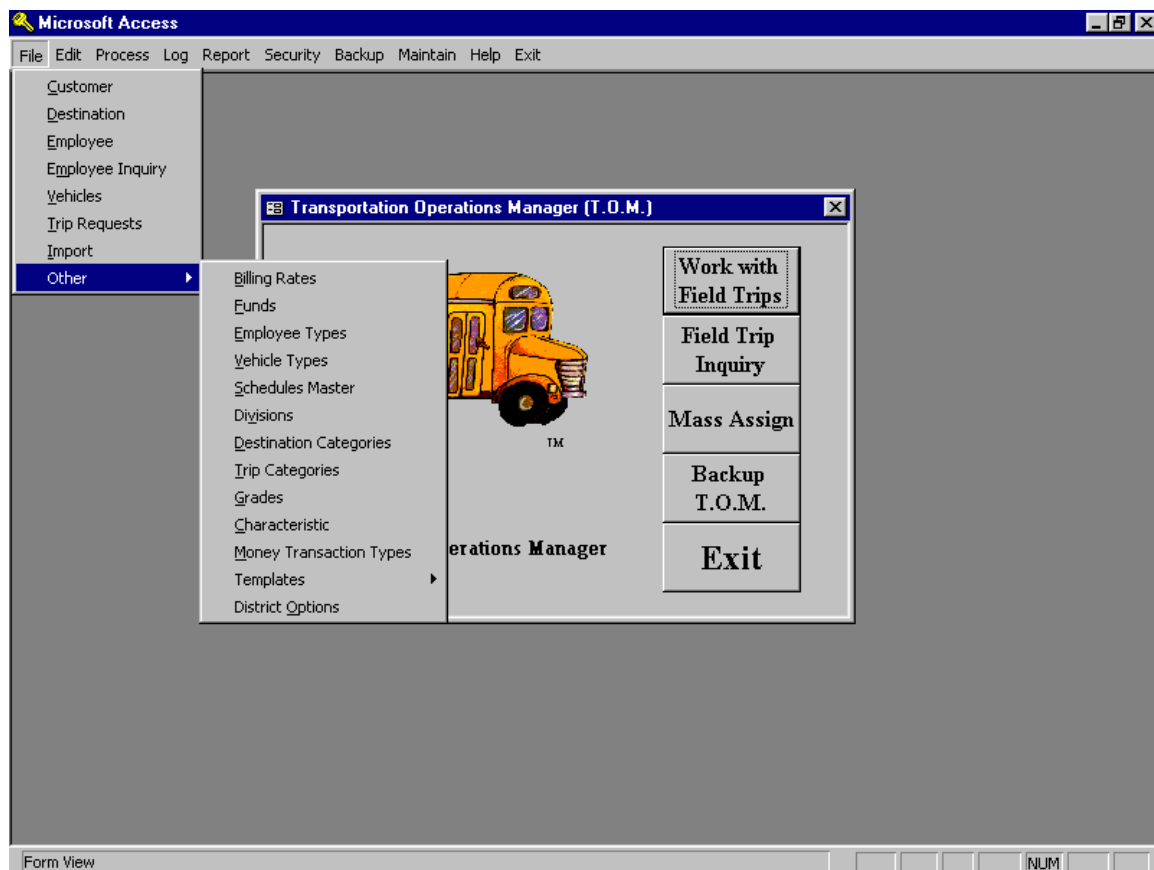


Figure 3-1. Accessing the Lookup Lists on T.O.M.'s Main Screen

All of the lookup lists use the List Maintenance screen type format as is exhibited in the Billing Rates screen (Figure 3-2). Each of these screens is very similar in the way they allow you to navigate through your list of values. All of these routines allow you to add, change and remove items in the list. Figure 3-2



gives a brief explanation of the various function buttons offered to you when you maintain a lookup list file.

Some list maintenance screens have additional function buttons that allow you to perform special functions for that type of list.

Working with Billing Rates

Billing rates are used to tell T.O.M. how much you charge for field trip miles and driver hours. You may create an unlimited number of billing rates. When you enter your customers you may also specify a default billing rate for this customer. This billing rate is then automatically *stamped* on each field trip for that specific customer. You may also change this default billing rate and assign a new billing rate when working with a specific field trip.

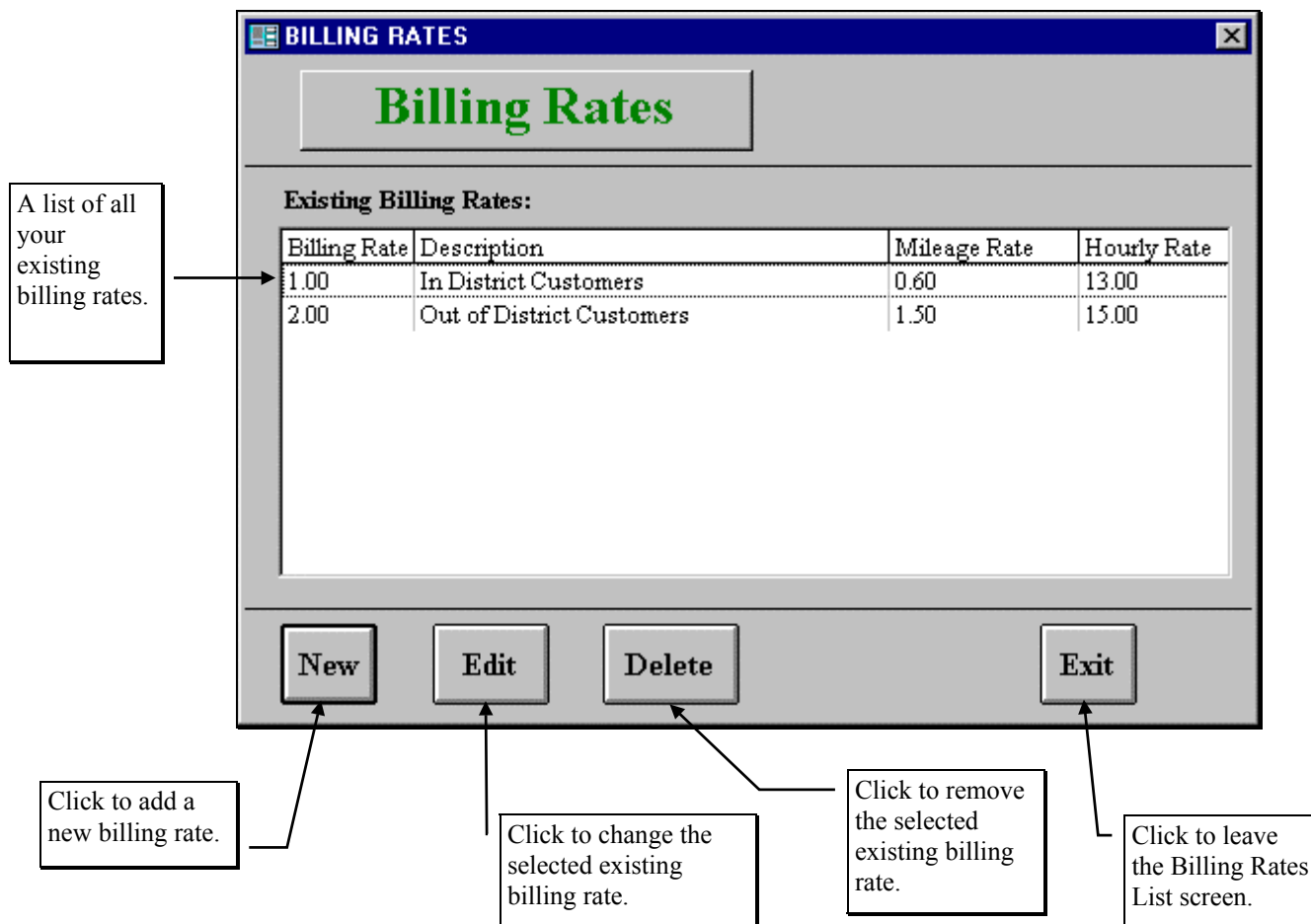


Figure 3-2. The Billing Rates List Screen

Figure 3-2 shows the Billing Rates List screen, which lists all of the billing rates that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new billing rate, change an existing billing rate or delete an existing billing rate.



Adding a New Billing Rate

If you wish to add a new billing rate click the New button and you will be taken to the Billing Rate Data Entry screen (Figure 3-3, Figure 3-4 and Figure 3-5). This screen will let you enter all of the billing rate information. To save the billing rate information you have entered click the OK button. To exit this screen without saving the information you have entered click the Exit button. See *Billing Rates Data Entry Screen Options* below for a complete description of the data entry fields and options.

Changing an Existing Billing Rate

If you wish to change an existing billing rate, then select a billing rate on the Billing Rate List screen (Figure 3-2) by clicking the row containing the desired billing rate and then click the Edit button. You will be taken to the Billing Rate Data Entry screen (Figure 3-3, Figure 3-4 and Figure 3-5), which will let you change any of the billing rate information except the billing rate code. To save the billing rate information you have changed, click the OK button. To exit this screen without saving the information you have entered click the Exit button. See *Billing Rates Data Entry Screen Options* below for a complete description of the data entry fields and options.

Deleting an Existing Billing Rate

To remove an existing billing rate, then select a Billing rate on the Billing Rate List screen (Figure 3-2) by clicking the row containing the desired billing rate and then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this billing rate. If you do confirm to T.O.M. that you want to delete the billing rate, T.O.M. will remove the billing rate from your T.O.M. database.

NOTE: *T.O.M. will not allow you to delete a Billing rate that is being used by either a customer as a default billing rate or by a field trip.*



Billing Rates Data Entry Screen Options

The Billing Rates screen uses three tabs to help you enter data in an organized fashion. They are the Rates/General tab (Figure 3-3), the Minimums tab (Figure 3-4) and the Flat Amounts tab (Figure 3-5). Click on the tab to see its options. The following describes the data entry fields and options for these tabs.

The Rates/General Tab on the Billing Rates Data Entry Screen

Click on the Rates/General tab in the Billing Rates Data Entry screen (Figure 3-3), if it is not already displayed.

BILLING RATES

Rates / General Minimums Flat Amounts

Billing Rate
Code: 1 Description: In District Customers

Instructions: Step Rates # of Employee Rate to use: 1

Mileage Rate: 0.60 For First: 30.00 Miles, Then Use Rate: 0.90

Hourly Rate: 13.00 For First: 2.00 Hours, Then Use Rate: 15.00

Wait Time Hourly Rate: 0.00

OT Wait Time Hourly Rate: 0.00

OK Exit

Figure 3-3. The Rates/General Tab on the Billing Rates Data Entry Screen

Billing Rate Code: The number that you assign a billing rate. The number must be unique for that billing rate. The number can be between 1 and 32,767.

Billing Description: The long description of the billing rate. This description can be a maximum of 30 characters.

Instructions: The instructions tell T.O.M. which billing rates and amounts to use. T.O.M.'s field trip billing can be very sophisticated and can accommodate a variety of billing methods simultaneously. The instructions tell T.O.M. what rate and amounts to use when calculating the field trip bill for all field trips assigned to this particular billing rate. T.O.M. offers you a list of six different billing instructions that you may choose from. Click on the down arrow to the right of the Instructions field to see this list of instructions and then click on the instructions that best suites a billing rate. The following is a detailed discussion of each of these instruction options:



Instruction	Description
Rate (default)	This instruction tells T.O.M. to multiply the field trips actual mileage and actual driver hours by the mileage rate and hourly rate supplied in this billing rate screen.
Step Rate	This instruction tells T.O.M. to bill at two mileage and / or hourly rates. When you select this instruction you will see the fields 'For First _____ Miles (hours) then, use rate _____' appear. If you do not select 'Step Rates' for you instructions these fields would NOT display. Step rates allow you to bill for one rate for an initial number of miles and / or hours and then a second rate for all miles / hours exceeding the initial number.
Employee Rates	<p>This instruction tells T.O.M. to multiply the actual field trip miles by the mileage rate supplied in this billing rate screen and to multiply the actual driver hours by the billing rate supplied in the employee screen for each employee actually assigned to the field trip. (See <i>Chapter 7 - Employees, Their Hours and Schedules</i> in this manual for more information about the employee's billing rate).</p> <p>NOTE: When calculating an estimate amount for a field trip using this billing rate T.O.M. will multiply the estimate hours by the hourly rate supplied in this billing rate screen.</p> <p>You may also specify the rate as the # of Employee Rate to Use as described below.</p>
Employee Rates with OT	<p>This instruction tells T.O.M. to multiply the actual field trip miles by the mileage rate supplied in this billing rate screen and to multiply the actual driver hours by the billing rate supplied in the employee screen for each employee actually assigned to the field trip.</p> <p>T.O.M. will also determine what part (if any) of the employee's actual hours were performed in overtime for the week. T.O.M. will then multiply those weekly overtime hours by the Billing Weekly Overtime Hourly Rate also supplied in the employee screen. See <i>Chapter 7 - Employees, Their Hours and Schedules</i> in this manual for more information about the employee's Billing Hourly Rate and Billing Weekly Overtime Hourly Rate.</p> <p>NOTE: When calculating an estimate amount for a field trip using this billing rate T.O.M. will multiply the estimate hours by the hourly rate supplied in this billing rate screen.</p> <p>The Employee Screen Allows you to specify up to six different Billing Hourly Rates and Billing Weekly Overtime Hourly Rates. In this Billing Rates Screen you specify which of these Billing Rates and Billing Weekly Overtime Rates you want T.O.M. to use when billing trips using this Billing Rate.</p>



Instruction	Description
Employee Rates with Daily OT	<p>This instruction tells T.O.M. to multiply the actual field trip miles by the mileage rate supplied in this billing rate screen and to multiply the actual driver hours by the billing rate supplied in the employee screen for each employee actually assigned to the field trip.</p> <p>T.O.M. will also determine what part (if any) of the employee's actual hours were performed in overtime for the day. T.O.M. will then multiply those weekly overtime hours by the Billing Daily Overtime Hourly Rate also supplied in the employee screen. See <i>Chapter 7 - Employees, Their Hours and Schedules</i> in this manual for more information about the employee's Billing Hourly Rate and Billing Daily Overtime Hourly Rate</p> <p>NOTE: When calculating an estimate amount for a field trip using this billing rate T.O.M. will multiply the estimate hours by the hourly rate supplied in this billing rate screen.</p> <p>The Employee Screen Allows you to specify up to six different Billing Hourly Rates and Billing Daily Overtime Hourly Rates. In this Billing Rates Screen you specify which of these Billing Rates and Billing Daily Overtime Rates you want T.O.M. to use when billing trips using this Billing Rate.</p>
Flat Amount	<p>This instruction tells T.O.M. to ignore the field trip's miles and hours when billing and simply bill the customer for the flat amounts that you have entered in the field trip screen.</p> <p>When you are adding a new field trip and you assign a billing rate to that field trip any amounts and description that you have entered in the five flat amount lines in this billing rate screen are <i>stamped on the five flat amount lines in the field trip screen</i>. You may then change these amounts for that particular field trip</p>

of Employee Rate to Use: If you have selected the options; 'Employee Rates', 'Employee Rates with OT' or 'Employee Rates with Daily OT' in the Instructions field then you are telling T.O.M. to use a set of billing rates in each employees record. T.O.M. allows you to specify up to six sets of these various billing rates for each employee. When you tell T.O.M. in the Billing Rates Instructions field that you want T.O.M. to use an Employee's Billing Rates you must also tell T.O.M. which one of these six set of employee billing rates to use. That is the purpose of the *# of Employee Rate to Use* field. Click on the down arrow to the right of the # of Employee Rate to Use field to see the list of numbers to use.

Mileage Rate: The dollar amount to multiply against actual miles when calculating bill if the instructions are Rate, Step Rates, Employee Rates, Employee Rates with OT or Employee Rates with Daily OT. This amount is also multiplied against the field trip's estimated miles when calculating an estimate for the field trip if the instructions are Rate, Step Rates, Employee Rates, Employee Rates with OT or Employee Rates with Daily OT.

Hourly Rate: The dollar amount to multiply against actual driver time when calculating the bill if the instructions are Rate. This amount is also multiplied against the field trip's estimated driver time when calculating an estimate for the field trip if the instructions are Rate, Step Rates, Employee Rates, Employee Rates with OT or Employee Rates with Daily OT.



The Minimums Tab on the Billing Rate Data Entry Screen

Click on the Minimums tab in the Billing Rate Data Entry screen (Figure 3-4), if it is not already displayed. The following describes the data entry fields and options for this tab.

The screenshot shows a window titled "BILLING RATES" with a close button (X) in the top right corner. Inside the window, there is a tabbed interface with three tabs: "Rates / General", "Minimums", and "Flat Amounts". The "Minimums" tab is currently selected. Below the tabs, there are three data entry fields, each with a label and a text box containing a value:

Field Label	Value
Minimum # of hours:	10.00
Minimum # of miles:	0.00
Minimum amount:	0.00

At the bottom of the window, there are two buttons: "OK" on the left and "Exit" on the right.

Figure 3-4. The Minimums Tab on the Billing Rates Data Entry Screen

Minimum # of Hours: This is a minimum number of hours that EACH driver assigned to the field trip must have billed. When you enter a number in this field T.O.M. will ensure during billing that the number of hours multiplied by the appropriate hourly rate is at least equal to the minimum number of hours.

Minimum # of Miles: This is a minimum number of miles that EACH vehicle assigned to the field trip must have billed. When you enter a number in this field T.O.M. will ensure during billing that the number of miles multiplied by the appropriate mileage rate is at least equal to the minimum number of miles.

Minimum Amount: This is a minimum dollar amount that you want T.O.M. to bill for EACH employee and vehicle assigned to the field trip. When you enter a number in this field T.O.M. will ensure during billing that the total amount billed for EACH employee and vehicle is at least equal to the minimum amount specified in this billing rate.

NOTE: *T.O.M. will not apply the minimums if you have selected 'Flat Amount' in the instructions field.*



The Flat Amounts Tab on the Billing Rate Data Entry Screen

Click on the Flat Amounts tab in the Billing Rate Data Entry screen (Figure 3-5), if it is not already displayed. The following describes the data entry fields and options for this tab.

Flat Amounts	
Description:	Amount:
#1: Stadium Parking	\$20.00
#2: Standard Tolls	\$10.00
#3:	\$0.00
#4:	\$0.00
#5:	\$0.00

Figure 3-5. The Flat Amounts Tab on the Billing Rates Data Entry Screen

Flat Amount Descriptions (1-5): You may set up five flat charges that will be *stamped* on a field trip that is assigned to this billing rate. You may then change these amounts and their descriptions at the field trip screen to some unique amount or description for that field trip. These flat amounts can be useful for entering common reoccurring charges that are to be commonly charged for field trips. By setting up the flat amounts in the Billing rate screen you will save time when entering field trips that usually charge the customers for these amounts. Each flat amount consists of the following two fields:

- *Flat Amount Description:* This is the description of the charge. It can be up to 50 characters. This description will appear on both the field trip estimate and invoice sent to the customer.
- *Flat Amount:* This is the amount of the charge. This amount is added to the total amount billed for a specific field trip.



Working with Funds

T.O.M. allows you to set up an unlimited number of funds that are used by your district. These funds that you enter are then displayed for you when entering in field trips. When entering a field trip you may specify which fund is paying for the field trip.

Funds and Customer's Field Trip Budgets

When setting up funds you may specify that a field trip that uses that fund will be subtracted from a customer's field trip budget. This feature is useful when, for example, you wish to set up an outside funding source like a PTSA group that will pay for field trips that are not funded by the school district. You may enter a fund for this funding source and indicate that field trips using this fund are NOT to be subtracted from a school's field trip budget.

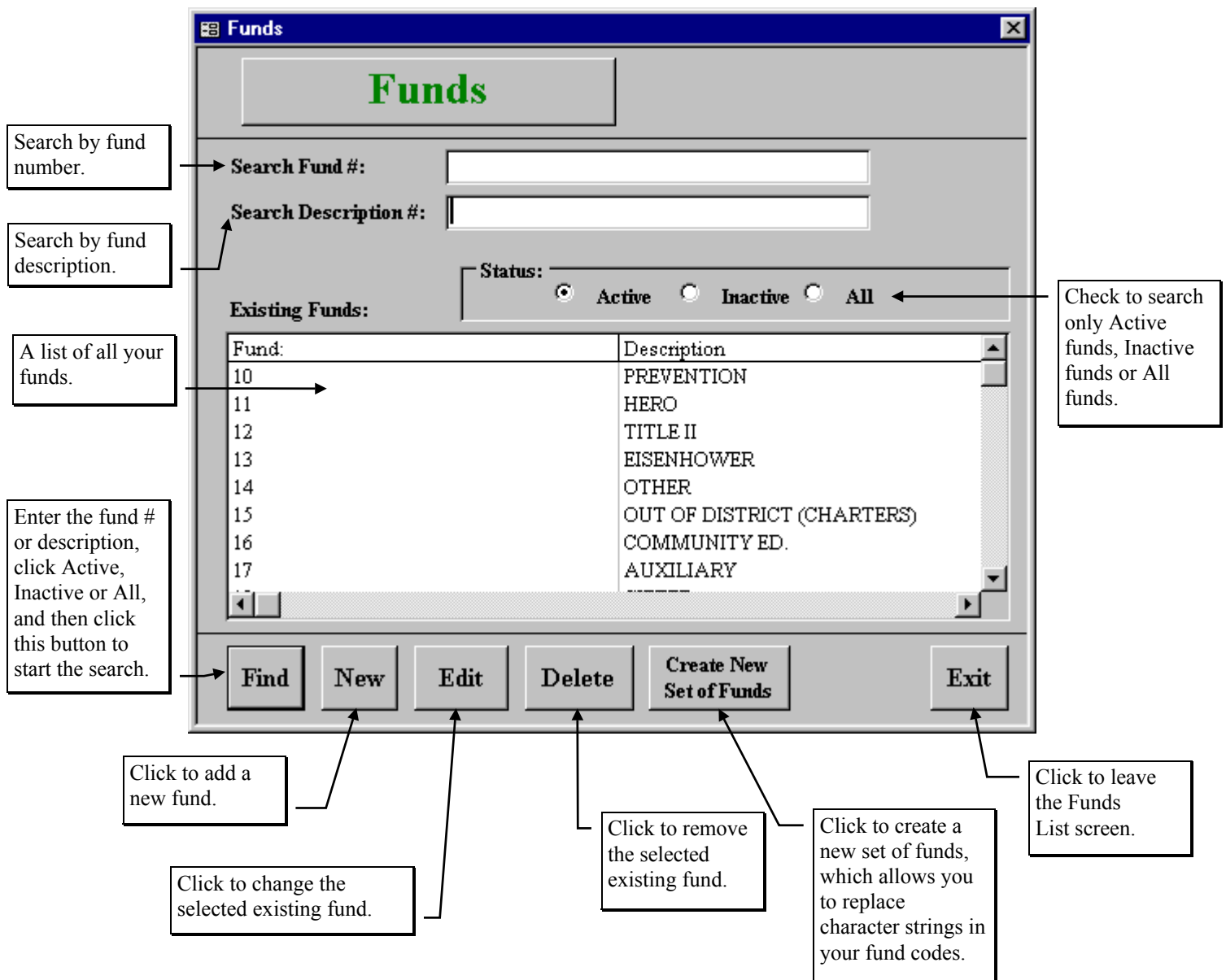


Figure 3-6. The Funds List Screen



Figure 3-6 is the list screen showing you all of the funds that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new fund, change an existing fund and remove existing fund. You can search for funds by fund number or by description if you don't know the fund number, which can be quicker than scrolling if you have a lot of funds.

Searching for a Fund

You can quickly search for a fund-by-fund number or description using T.O.M.'s search feature. If you don't know the fund number, searching by fund description is helpful. If you have a lot of funds, searching can be faster than scrolling. You can limit or expand your fund search by selecting All loans, only Active loans or only Inactive loans in the Status field.

Enter the fund number or fund description. Select Active, Inactive or All in the Status field. Click the Find button. If a match is found, the fund(s) will be displayed in the Existing Funds list. If you wish to edit this fund, click the Edit button. **NOTE:** To select all funds again, delete the search information and click the Find button.

Adding a New Fund

If you wish to add a new fund click the New button and you will be taken to the Fund Data Entry screen (Figure 3-7). This screen will let you enter all of the fund information. To save the fund information you have entered, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

NOTE: By checking the Active checkbox, the fund will appear in any fund drop-down list. When a fund becomes inactive, you can edit the fund here and uncheck this checkbox to make it inactive. The fund will no longer appear in any fund drop-down list.

The screenshot shows the 'FUND' window with the following fields and controls:

- Fund:** A text field containing the number '4'. Callout: 'Fund Code (can be up to 50 characters - must be unique to each fund).'
- Description:** A text field containing 'VOCATIONAL ED.'. Callout: 'Long description of fund (30 Characters Max.)'.
- Subtract Field Trips Using this Fund from a Customer's Field Trip Budget:** A checkbox that is checked. Callout: 'Checkbox telling T.O.M. to subtract (checked) or not subtract (unchecked) the field trip amount from a customer's field trip budget.'
- Active:** A checkbox that is checked. Callout: 'Checkbox to indicate whether the fund is Active (checked) or Inactive (unchecked).'
- OK:** A button. Callout: 'Click to save the Fund information and return to the Fund List screen.'
- Exit:** A button. Callout: 'Click to return to the Fund List screen WITHOUT saving the information that you typed.'

Figure 3-7. The Fund Data Entry Screen



Changing an Existing Fund

If you wish to change an existing fund then select a fund on the Fund List screen (Figure 3-6) by clicking the row containing the desired fund and then click the Edit button. You will be taken to the Fund Data Entry screen (Figure 3-7). This screen will let you change any of the fund information except the fund code. For example, you can make a fund inactive by “unchecking” the Active checkbox. To save the fund information you have changed click the OK button. To exit this screen without saving the information you have entered click the Exit button.

Deleting an Existing Fund

If you wish to remove an existing fund, then select a Fund on the Fund List screen (Figure 3-6) by clicking the row containing the desired fund and then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this fund. If you do confirm to T.O.M. that you want to delete the fund, T.O.M. will remove the fund from your T.O.M. database. **NOTE:** *T.O.M. will not allow you to delete a Fund that is being used by a field trip.*

Creating a New Set of Funds from an Existing Set of Funds

Some T.O.M. customers must enter in a large number of funds that contain the actual fiscal year in the fund number. Those customers must then enter a new set of funds each year with the new fiscal year in the fund number. Not only is the time consuming and tedious it can leave the customer with a huge list of old and new funds that is difficult to search through. T.O.M. *Create a Set of Funds from an Existing Set of Funds* feature was created to assist in this situation.

The Create New Funds from an Existing Set of Funds screen (Figure 3-9) allows you to create a new set of funds by copying the existing funds and changing a group of characters in the fund number. For example, you can replace the year “1999” with “2000.” In addition, you can make the previous year’s funds inactive so that they do not appear in screens that list funds.

WARNING! *This is a very powerful feature and should be used with caution and understanding of what you are doing. Before proceeding, you should make sure that you are the only person using T.O.M. and that you have backed up your T.O.M. database.*

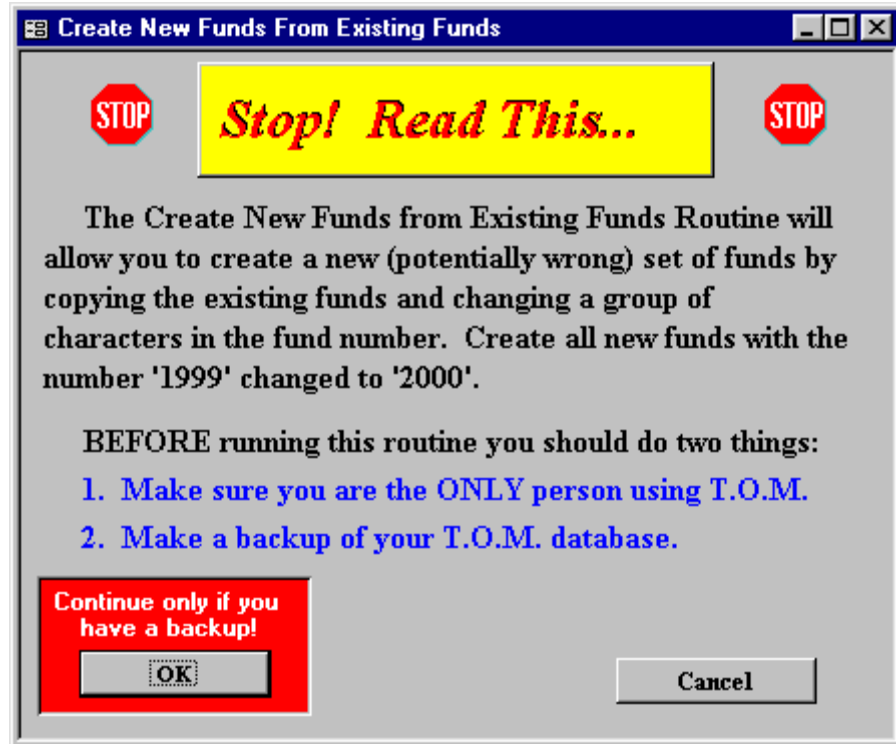


Figure 3-8. DO NOT Proceed unless you have backed up your T.O.M. database!

From the Funds List screen (Figure 3-6), click the Create New Set of Funds button. Heed the warning screen and click the OK button when you are ready to proceed. The Create New Funds From Existing Funds screen (Figure 3-9) is displayed.

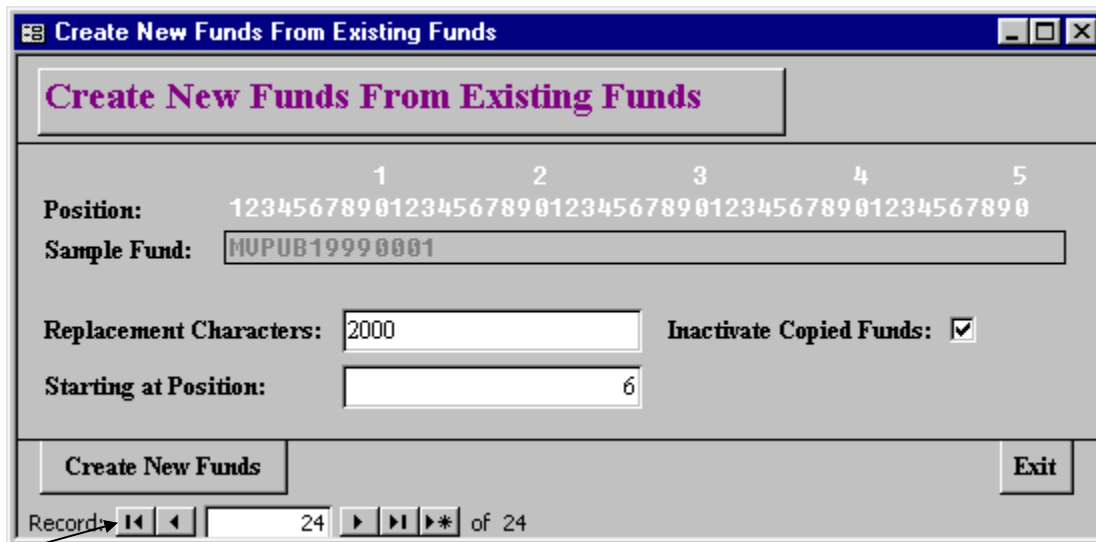


Figure 3-9. The Create New Funds From Existing Funds Screen

'VCR' buttons
that let you scroll
through your list
of funds.



Position: This really is nothing more than a ruler that helps you determine the starting position of the characters you wish to replace. When entering the starting position of the characters you wish to replace, look at this set of numbers. For example, if you are replacing 1999 in fund numbers that have this sequence: MVPUB19990001, the starting position would be 6.

Sample Fund: Shows a sample of what your fund numbers look like. You can scroll through the records using the “VCR buttons” near the bottom of the screen.

Replacement Characters: Enter the numbers you wish to replace. For example, to replace 1999 with 2000, you would enter “2000.”

Starting at Position: When entering the starting position of the characters you wish to replace, look at the Position numbers at the top of the screen. For example, if you are replacing 1999 in fund numbers that have this sequence: MVPUB19990001, the starting position would be 6.

Inactivate Copied Funds: Check this box to inactivate the original fund numbers so that they do not show up in other screens that list funds. These funds are NOT deleted, just made inactive.



Working with Employee Types

Employee Types allow you to enter the different categories of employees your district has. You may enter an unlimited number of employee types. T.O.M. ships to you with a list example Employee Types. You do NOT have to use these Employee Types if you do not wish to. Just keep the ones that you like and delete the rest.

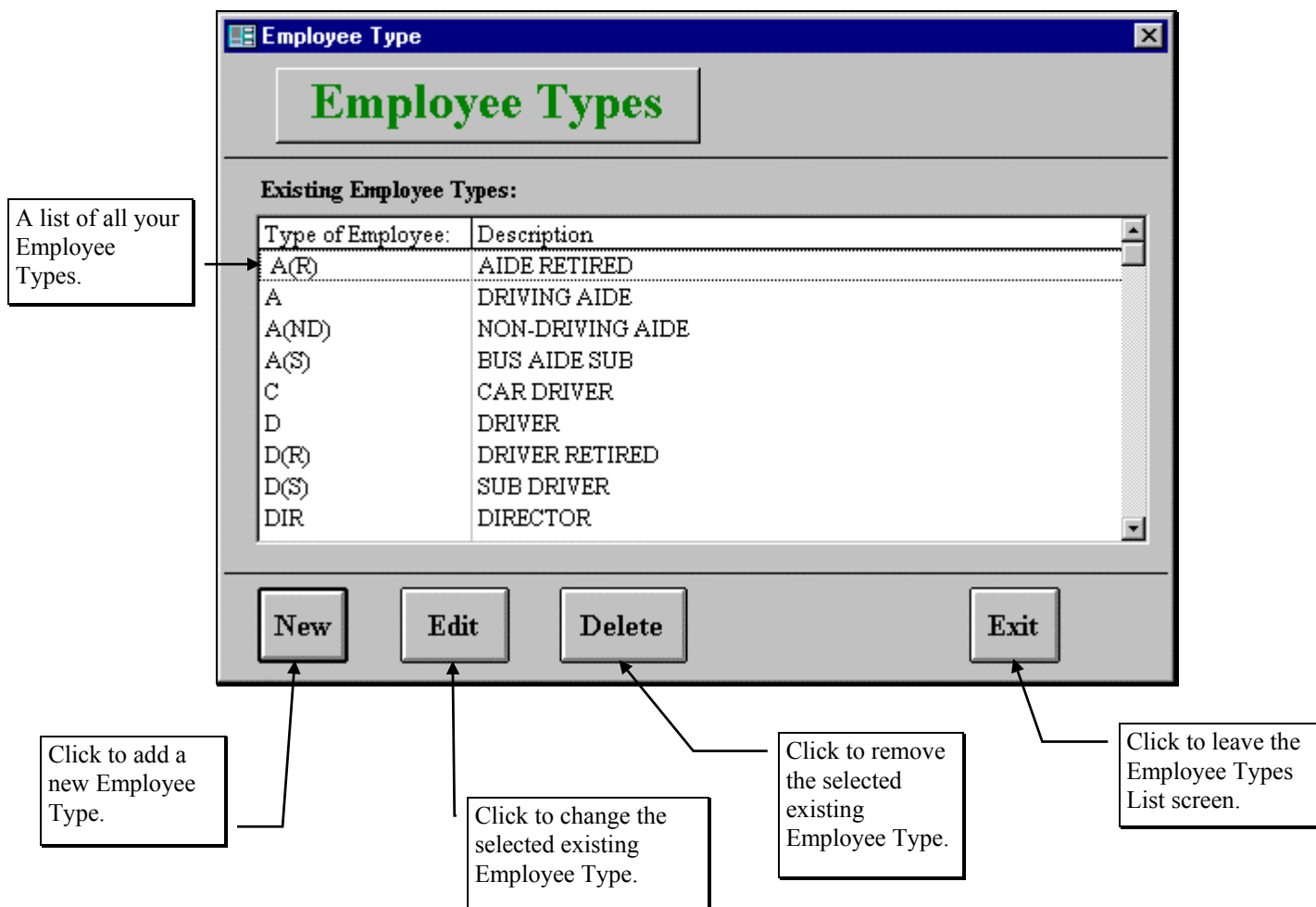


Figure 3-10. The Employee Type List Screen

Figure 3-10 is the list screen showing you all of the Employee Types that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new Employee Type, change an existing Employee Type and remove existing Employee Type.

Adding a New Employee Type

If you wish to add a new Employee Type click the New button and you will be taken to the Employee Type Data Entry screen (Figure 3-11). This screen will let you enter all of the Employee Type information. To save the Employee Type information you have entered click the OK button. To exit this screen without saving the information you have entered, click the Exit button. See *Employee Type Data Entry Screen Options* below for a complete description of the data entry fields and options.



Figure 3-11. The Employee Type Data Entry Screen

Changing an Existing Employee Type

If you wish to change an existing Employee Type, select an Employee Type on the Employee Type List screen (Figure 3-10) by clicking the row containing the desired Employee Type. Then click the Edit button. You will be taken to the Employee Type Data Entry screen (Figure 3-11). This screen will let you change any of the Employee Type information except the Employee Type code. To save the Employee Type information you have changed, click the OK button. To exit this screen without saving the information you have entered, click the Exit button. See *Employee Type Data Entry Screen Options* below for a complete description of the data entry fields and options.

Deleting an Existing Employee Type

If you wish to remove an existing Employee Type, select an Employee Type on the Employee Type List screen (Figure 3-10) by clicking the row containing the desired Employee Type. Then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this Employee Type. If you do confirm to T.O.M. that you want to delete the Employee Type, T.O.M. will remove the Employee Type from your T.O.M. database. **NOTE:** *T.O.M. will not allow you to delete a Employee Type that is being used by an Employee.*

Employee Type Data Entry Screen Options

The following describes the data entry fields and options for the Employee Type Data Entry screen.

Type: This is the unique code assigned to each employee type. The Type can be up to 5 characters - must be unique to each Employee Type.

Description: This is the long description of the employee type. The description can be up to 30 characters long.

Weekly OT Hours: When automatically assigning drivers to field trips T.O.M. can preclude weekly overtime if you choose. T.O.M. also gives you the flexibility to specify at what number of hours in a week you consider overtime to occur (this is done in the District Options screen). T.O.M. furthers this flexibility



by allowing you to define what number of hours in a week you consider overtime to occur by employee type. This can be useful, for example, if you have drivers or aids that you do not wish to exceed 20 or 30 hours in a week. When you specify a number greater than 0 in this field and instruct T.O.M. to preclude overtime when assigning field trips, T.O.M. will ensure that no employees with this employee type are assigned to field trips if that assignment will cause their weekly hours to exceed this number. If this number is 0 then T.O.M. will use the weekly OT Hours that you specified in the District Options screen.

Daily OT Hours: When automatically assigning drivers to field trips, T.O.M. can preclude daily overtime if you choose. T.O.M. also gives you the flexibility to specify at what number of hours in a day you consider overtime to occur (this is done in the District Options screen). T.O.M. furthers this flexibility by allowing you to define what number of hours in a day you consider overtime to occur by employee type. This can be useful, for example, if you have drivers or aids that you do not wish to exceed 4 or 5 hours in a day. When you specify a number greater than 0 in this field and instruct T.O.M. to preclude overtime when assigning field trips T.O.M. will ensure that no employees with this employee type are assigned to field trips if that assignment will cause their daily hours to exceed this number. If this number is 0 then T.O.M. will use the daily OT Hours that you specified in the District Options screen.



Working with Vehicle Types

Vehicle Types allow you to not only specify the different categories of vehicles in your district but also to specify the various capacity levels of each vehicle type. T.O.M. ships to you a list of example Vehicle Types. You do NOT have to use these Vehicle Types if you do not wish to. Just keep the ones that you like and delete the rest.

Vehicle Types – Passenger Capacities – and How T.O.M. Automatically Calculates the Number of Vehicles Required for a Field Trip

Each vehicle type allows you to enter 3 levels of capacity; High, Medium and Low. High capacity could be for example, the number of first grade children that could fit in the vehicle. Low capacity, on the other hand, may be the number of high school football players in their uniforms that could fit in the vehicle.

These capacities are used by the system to calculate the number of vehicles required for a field trip. When entering a field trip, you may specify which capacity (high, medium or low) T.O.M. is to use when calculating the number of vehicles required for the field trip. For more information about how T.O.M. uses the vehicle capacity to calculate the number of vehicles required for a field trip, see the section titled *How T.O.M. Automatically Calculates the Number of Vehicles Needed for a Field Trip* in Chapter 1 - Entering Field Trips and Printing Estimates in the T.O.M. User Guide.

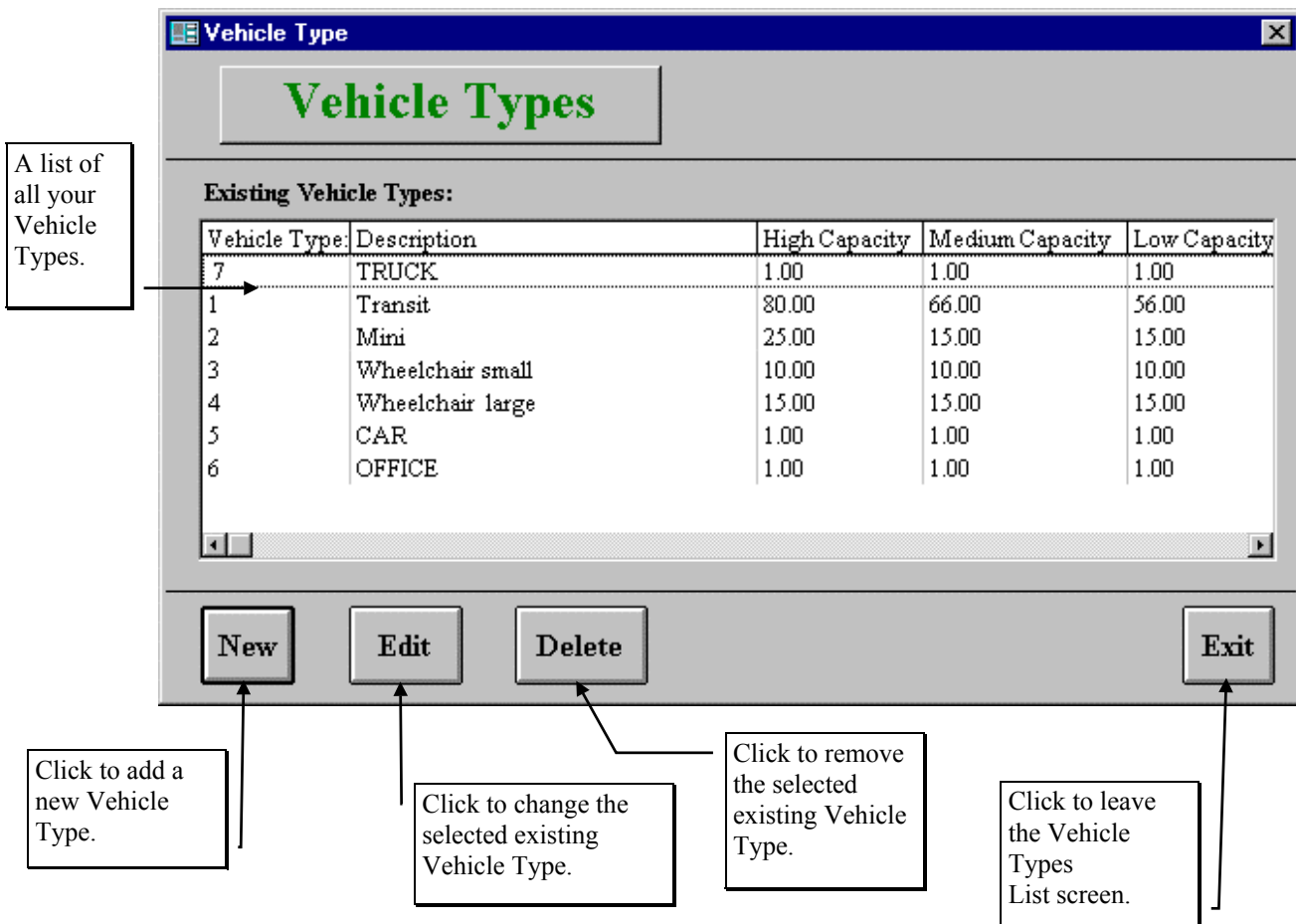


Figure 3-12. The Vehicle Types List Screen



Figure 3-12 is the list screen showing you all of the Vehicle Types that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new Vehicle Type, change an existing Vehicle Type and remove existing Vehicle Type.

Adding a New Vehicle Type

If you wish to add a new Vehicle Type, click the New button and you will be taken to the Vehicle Type Data Entry screen (Figure 3-13). This screen will let you enter all of the Vehicle Type information. To save the Vehicle Type information you have entered, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

The screenshot shows a window titled "VEHICLE TYPE" with a close button in the top right. The main title "Vehicle Type" is in a large, stylized font. Below it are several input fields and buttons:

- Vehicle Type:** A text box containing the number "1". A callout box explains: "Vehicle Type Code (can be up to 3 characters - must be unique to each Vehicle Type)." and "The number of small passengers this vehicle type can carry."
- Description:** A text box containing the word "Transit". A callout box explains: "Long description of Vehicle Type (30 characters max.)."
- High Capacity:** A text box containing the number "80". A callout box explains: "The number of average size passengers this vehicle type can carry."
- Medium Capacity:** A text box containing the number "66". A callout box explains: "The number of large passengers that this vehicle type can carry."
- Low Capacity:** A text box containing the number "56". A callout box explains: "The number of large passengers that this vehicle type can carry."
- Buttons:** At the bottom are two buttons: "OK" and "Exit". A callout box for the "OK" button says: "Click to save the Vehicle Type information and return to the Vehicle Type List screen." A callout box for the "Exit" button says: "Click to return to the Vehicle Type List screen WITHOUT saving the information that you typed."

Figure 3-13. The Vehicle Type Data Entry Screen

Changing an Existing Vehicle Type

If you wish to change an existing Vehicle Type, select a Vehicle Type on the Vehicle Type List screen (Figure 3-12) by clicking the row containing the desired Vehicle Type. Then click the Edit button. You will be taken to the Vehicle Type Data Entry screen (Figure 3-13). This screen will let you change any of the Vehicle Type information except the Vehicle Type code. To save the Vehicle Type information you have changed, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

Deleting an Existing Vehicle Type

If you wish to remove an existing Vehicle Type, select a Vehicle Type on the Vehicle Type List screen (Figure 3-12) by clicking the row containing the desired Vehicle Type. Then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this Vehicle Type. If you do confirm to T.O.M. that you want to delete the Vehicle Type, T.O.M. will remove the Vehicle Type from your T.O.M. database. **NOTE:** T.O.M. will not allow you to delete a Vehicle Type that is being used by a Field Trip or by a Vehicle.



Working with Schedules

The word “Schedules” is somewhat of a misnomer in the way T.O.M. uses them. The best way to think of schedules is as *driver lists*. Schedules are a KEY item in the Automatic Assignment function of T.O.M. When you enter schedules during setup you are merely entering the codes and descriptions of the schedules that you will be assigning to employees and vehicles. You may then *build* them by adding drivers and vehicles to these schedules.

This is not the only place where you can *build* your schedules. When you enter your employees and your vehicles you may also indicate which schedule(s) they are assigned.

Please refer to *Appendix A - Schedules - Setting Them Up & How They Affect Automatic Assignment* for a detailed discussion on schedules. It is very important that you understand how schedules are used by the system when automatically assigning drivers and vehicles to a field trip. If you do not set your schedules up correctly, the system will not automatically assign the correct drivers and vehicles to your field trips.

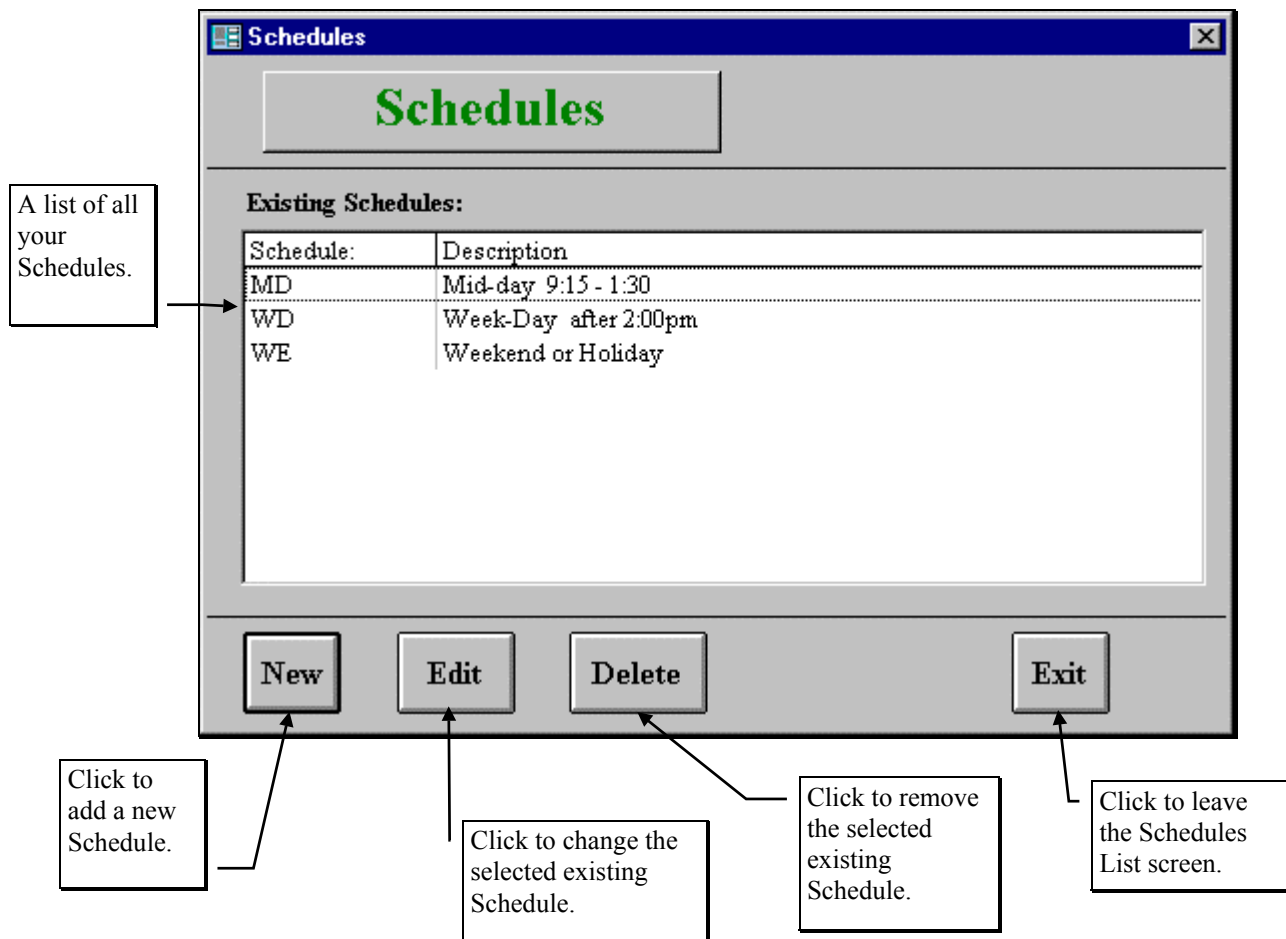


Figure 3-14. The Schedule List Screen



Figure 3-14 is the list screen showing you all of the Schedules that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new Schedule, change an existing Schedule and remove existing Schedule.

Adding a New Schedule

If you wish to add a new Schedule, click the New button and you will be taken to the Schedule Data Entry screen (Figure 3-15). This screen will let you enter all of the Schedule information. To save the Schedule information you have entered, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

Code given to Schedule. 6 Characters Max. Each code must be unique for each schedule.

Long description of Schedule (30 characters max.).

The number of the next employee that will have a field trip assigned to him / her when the Auto assign is used (if you are using the rotation auto assign method).

This list of all drivers in the schedule in seniority order or in the order you selected in your District Options. (NOTE: This list is for inquiry only to add or remove an employee from a schedule see Chapter 7 - Employees.)

Click to save the Schedule information and return to the Schedule List screen.

Click to return to the Schedule List screen WITHOUT saving the information that you typed.

Click to display the Spare Vehicle screen (Figure 3-17) listing all vehicles that you designated as spare for this schedule.

Click to display the Add / Remove Employees from Schedule screen (Figure 3-16).

Click to display the Open Cancellations screen (Figure 3-19).

Click to display the Open Makeups screen (Figure 3-20).

Figure 3-15. The Schedule Data Entry Screen

Employee #	Last Name:	First Name:	Hire Date:	Seniority:
25	ADAPS	CAROLYN	8/23/76	0
31	BIPKA	KATHLEEN	3/17/80	1
81	AKSLSIM	CATHERINE	9/5/89	5
82	JIHPSIP	EILEEN	9/5/89	6
98	SHSIKI	EDMOND	8/24/90	5
104	ALDSIDGA	ALICE	8/24/90	14
123	SUZICH	JILL	9/19/91	2
125	DAVIDK	LLOYD	10/17/91	2

Buttons: OK, Print, Vehicles, Add / Remove Employees, Open Cancellations, Open Makeups, Exit



Changing an Existing Schedule

If you wish to change an existing Schedule, select a Schedule on the Schedule List screen (Figure 3-14) by clicking the row containing the desired Schedule. Then click the Edit button. You will be taken to the Schedule Data Entry screen (Figure 3-15). This screen will let you change any of the Schedule information except the Schedule code. To save the Schedule information you have changed, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

Deleting an Existing Schedule

If you wish to remove an existing Schedule, select a Schedule on the Schedule List screen (Figure 3-14) by clicking the row containing the desired Schedule. Then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this Schedule. If you do confirm to T.O.M. that you want to delete the Schedule, T.O.M. will remove the Schedule from your T.O.M. database. **NOTE:** *T.O.M. will not allow you to delete a Schedule that is being used by a Field Trip, Employee or by a Vehicle.*

Printing a Schedule Report

You may at any time print a simple list of the schedule, its description and all the employees as well as vehicles assigned to the schedule by clicking the Print button. This list will also indicate which is the next employee that will be assigned to a field trip using this schedule.



Adding and Removing Employees To / From a Schedule

After creating a schedule you may right then add employees to that schedule. Or you may wish to add new employees to an existing schedule or remove employees from an existing schedule. To access the screen that allows you to do this click on the Add / Remove Employees button. When you do this the Add / Remove Employees From Schedule screen appears (Figure 3-16). This screen will let you add or remove employees from the current schedule. When you have finished adding or removing employees from this screen you will be returned to the Schedule screen.

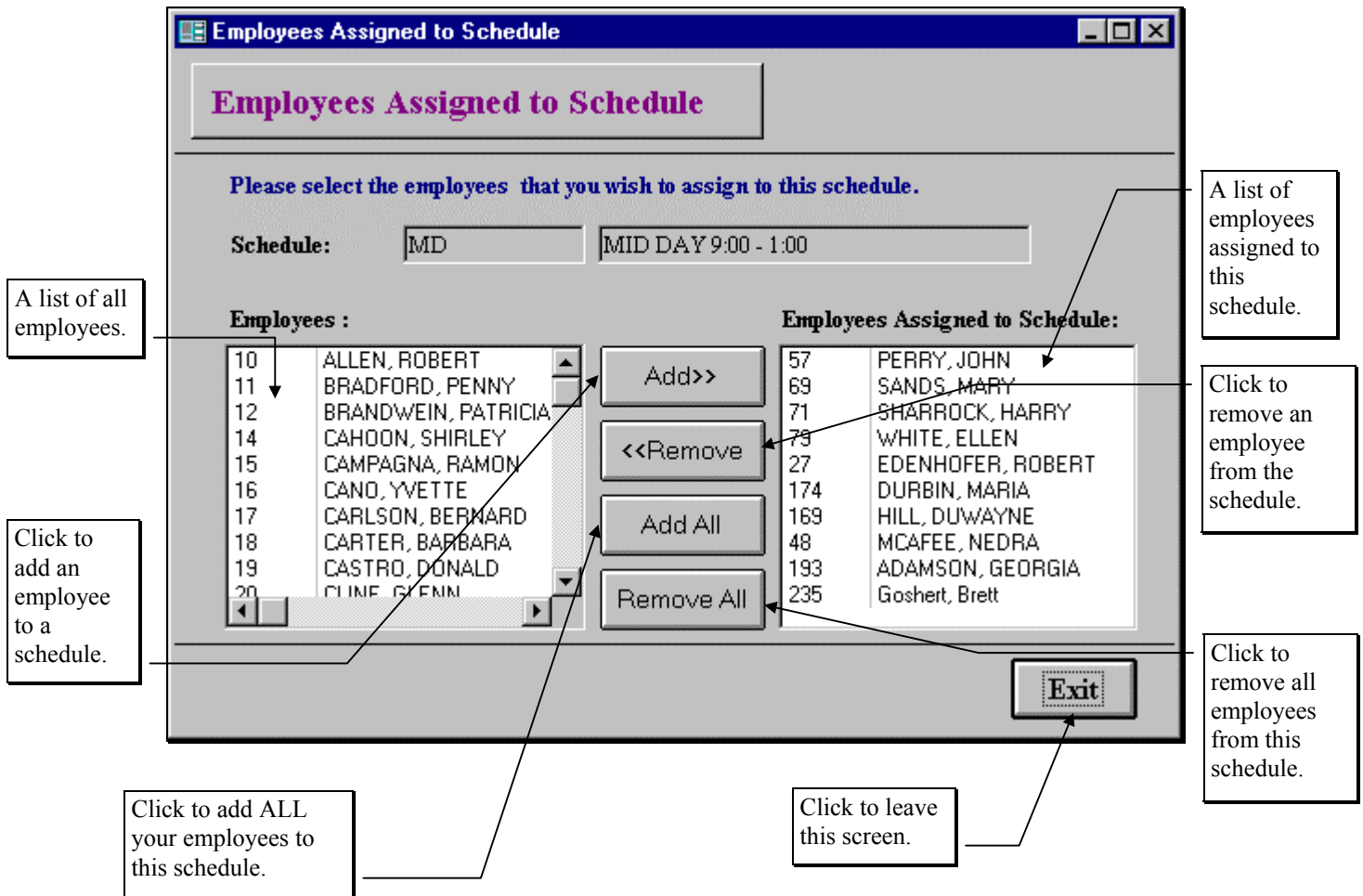


Figure 3-16. The Add / Remove Employees To Schedule Screen



Viewing the Spare Vehicles of a Schedule

While viewing a schedule you may also view those spare vehicles assigned to a schedule. To do this you would click the Vehicles button, which would cause the Vehicles Assigned to Schedule screen (Figure 3-17) to display. This screen lists all spare vehicles that are assigned to a specific schedule. These vehicles are listed in ascending order by date of last use and vehicle number. From here you may go to the Add / Remove Vehicles from a Schedule screen (Figure 3-18) where you may add or remove vehicles to or from this schedule.

When you assign a vehicle to a schedule you are telling T.O.M. that it is available as a *spare* vehicle that other employees may use when they are automatically assigned to a field trip that is using this schedule. When automatically assigning drivers to field trips T.O.M. will always try and use that driver's normal vehicle. But if that driver's vehicle is the wrong type or is already in use then T.O.M. turns to this list of vehicles assigned to the schedule for an alternate vehicle for that employee. Please take time to read *Appendix A - Schedules - Setting Them Up & How they Affect Automatic Assignment* for more information about this topic.

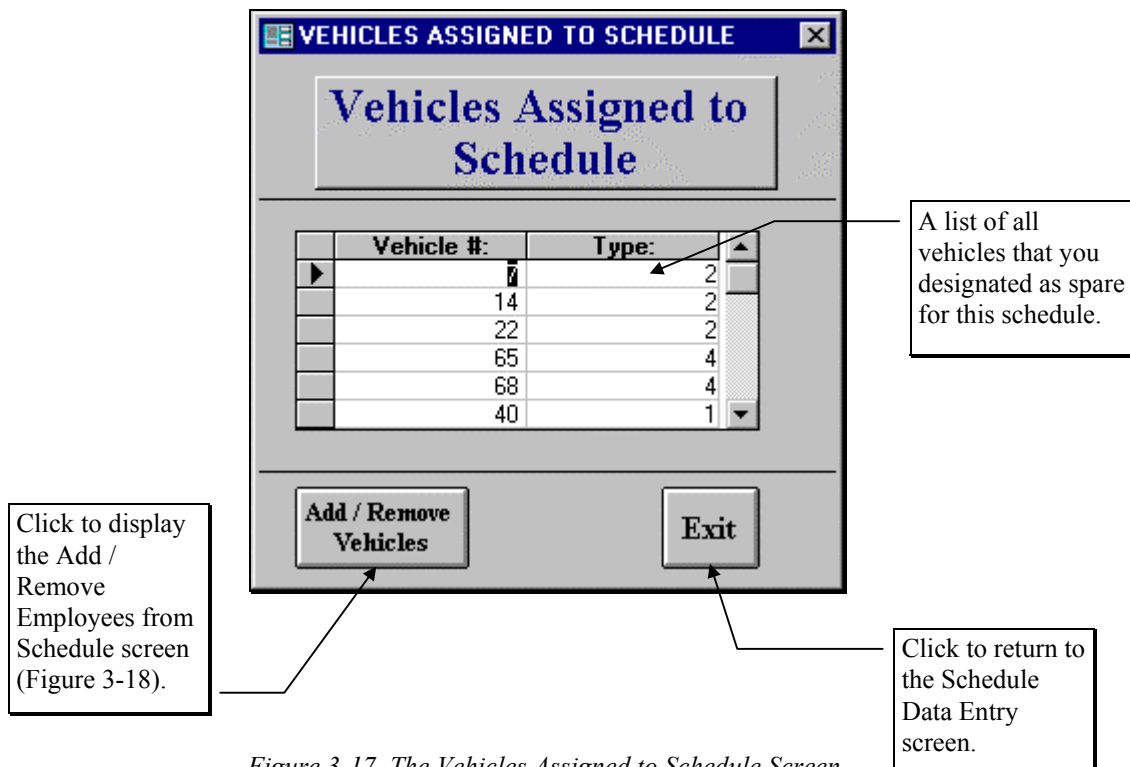


Figure 3-17. The Vehicles Assigned to Schedule Screen



Adding and Removing Vehicles To / From a Schedule

After creating a schedule you may right then add vehicles to that schedule. Or you may wish to add new vehicles to an existing schedule or remove vehicles from an existing schedule. To access the screen that allows you to do this click on the Add / Remove Vehicles button. When you do this the Add / Remove Vehicles From Schedule screen appears (Figure 3-18). This screen will let you add or remove Vehicles from the current schedule. When you have finished adding or removing Vehicles from this screen you will be returned to the Schedule screen.

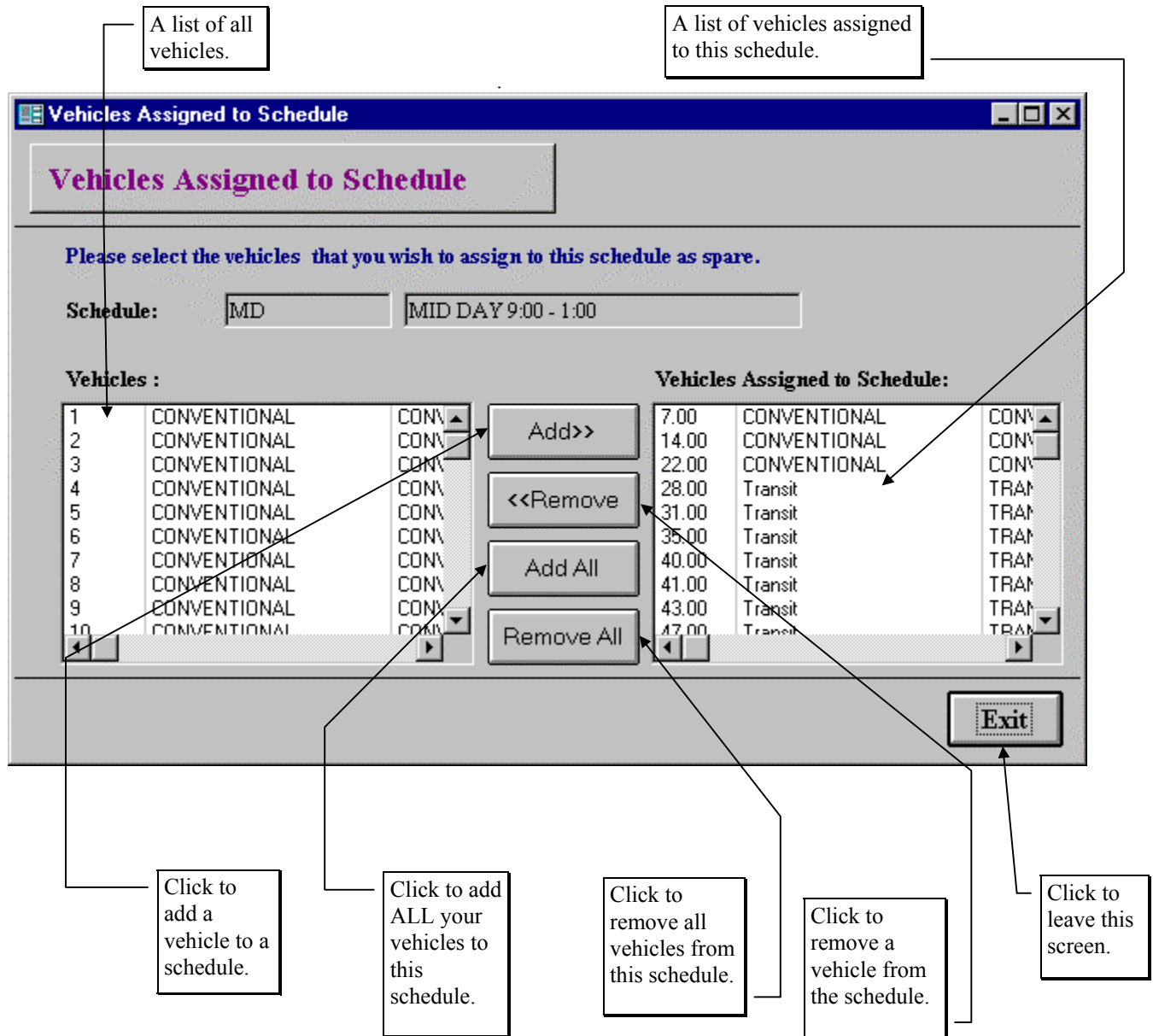


Figure 3-18. The Add / Remove Vehicles To Schedule Screen



Showing Open Cancellations for a Schedule

A driver is considered having a cancellation when he / she is assigned to a field trip and their assignment status is changed to 'Canceled' by a user or the user cancels the entire field trip that driver was assigned to. In your District Options Screen (Chapter 4 of this book) you may instruct T.O.M. whether, during automatic assignment, you want T.O.M. to automatically replace driver assignments that were canceled. If you do indicate that you want T.O.M. to replace these cancellations this screen allows you to see all cancellations that have not been replaced for this particular schedule. This can help you predict which drivers T.O.M. will attempt to assign first the next time you run T.O.M. automatic assignment process.

Cancelled Trip Date	Employee	Last Name	First Name	Canceled Trip
3/6/00	347	BHUMPCUN-CIVISCUN	DEBORAH	9433
3/6/00	115	CAUNDISC	SUSAN	9435

Figure 3-19. The Open Cancellations Screen



Showing Open Makeups for a Schedule

T.O.M. considers a makeup when a driver is either considered for assignment to a field trip during automatic assignment and then is skipped due to some type of a conflict or the driver was assigned to a trip and a user changes that driver's assignment status from 'Assigned' to 'Pass-Makeup'. In your District Options Screen (Chapter 4 of this book) you may instruct T.O.M. whether, during automatic assignment, you want T.O.M. to automatically replace driver makeups. If you do indicate that you want T.O.M. to replace these makeups this screen allows you to see all makeups that have not been replaced for this particular schedule. This can help you predict which drivers T.O.M. will attempt to assign first the next time you run T.O.M. automatic assignment process.

Current Unreplaced Cancellations					
Unreplaced Makeups					
Passed Trip Date	Employee	Last Name	First Name	Passed Trip	
12/29/99	215	WIPD	JAMES	5888	
12/29/99	216	SILIS	SYLVIA	5888	
12/29/99	220	FISLAS	THERESA	5888	
12/29/99	231	GSAB	EDWARD	5888	
12/29/99	237	MISLSIL	MIRIAM	5888	
12/29/99	240	FISBIZII	CHARLES	5888	
12/29/99	242	HILLIY	ROBERT	5888	
12/29/99	239	WHILIKAS	JAMES	5888	
12/29/99	245	LIMLIPSIP	GERALD	5888	
12/29/99	256	CLISK	DANIEL	5888	
					Exit

Figure 3-20. The Open Makeups Screen



Working with Destination Categories

T.O.M. allows you to group your destinations into various categories. These categories can be useful later in analyzing the number of field trips taken to certain types of destinations, for example. These categories are optional. You are not required to create any destination categories.

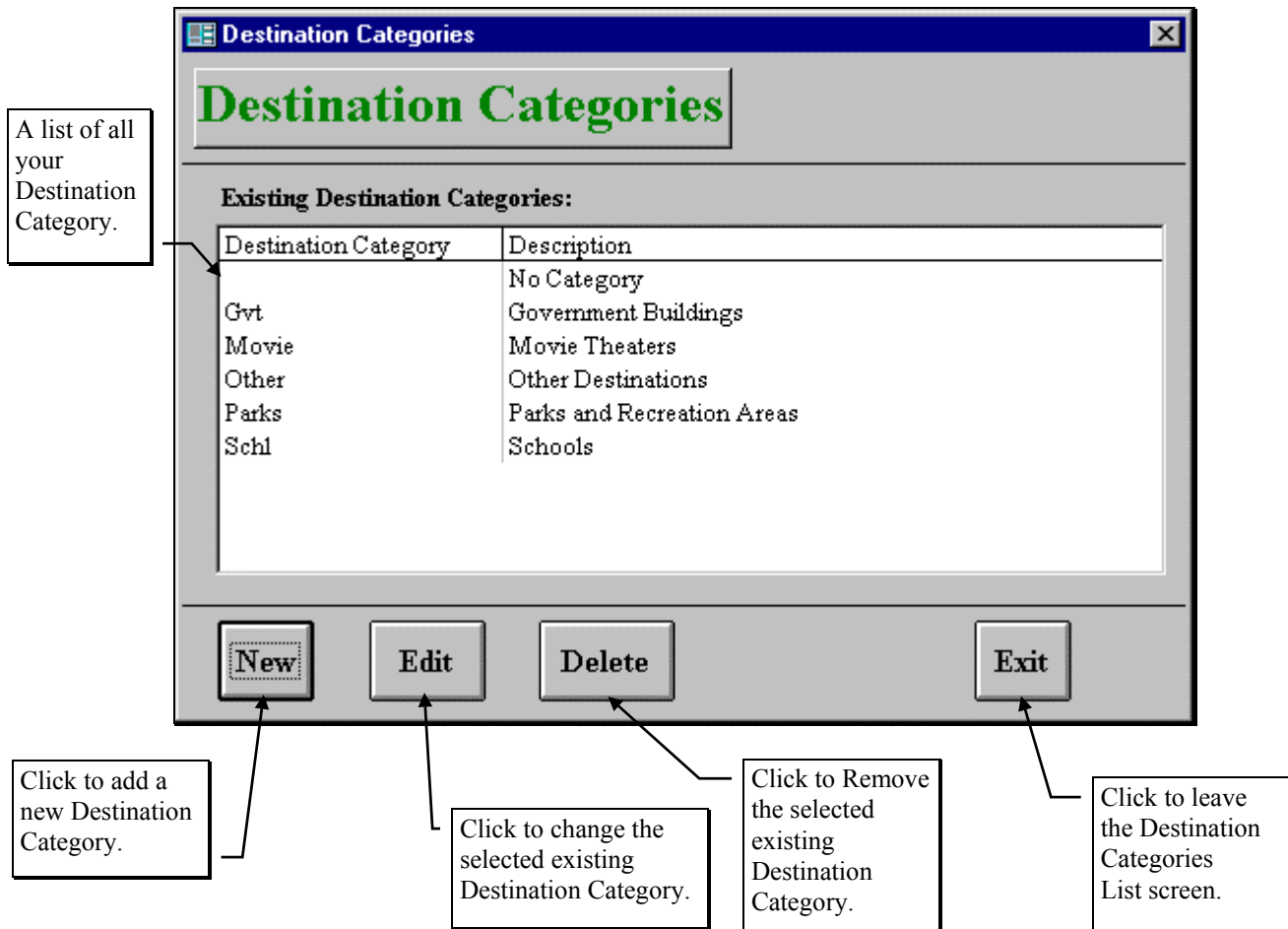


Figure 3-21. The Destination Category List Screen

Figure 3-21 is the list screen showing you all of the Destination Categories that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new Destination Category, change an existing Destination Category and remove existing Destination Category.



Adding a New Destination Category

If you wish to add a new Destination Category, click the New button and you will be taken to the Destination Category Data Entry screen (Figure 3-22). This screen will let you enter all of the Destination Category information. To save the Destination Category information you have entered, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

The screenshot shows a window titled "DESTINATION CATEGORIES" with a sub-header "Destination Category". It contains two text input fields: "Destination Category:" with the value "Parks" and "Description:" with the value "Parks and Recreation Areas". At the bottom are "OK" and "Exit" buttons. Four callout boxes provide additional information: 1. Points to the "Destination Category:" field with the text "Destination Category Code (can be up to 5 characters - must be unique to each Destination Category)". 2. Points to the "Description:" field with the text "Long description of Destination Category (30 characters max.)". 3. Points to the "OK" button with the text "Click to save the Destination Category information and return to the Destination Category List screen." 4. Points to the "Exit" button with the text "Click to return to the Destination Category List screen WITHOUT saving the information that you typed."

Figure 3-22. The Destination Category Data Entry Screen

Changing an Existing Destination Category

If you wish to change an existing Destination Category, select a Destination Category on the Destination Category List screen (Figure 3-21) by clicking the row containing the desired Destination Category. Then click the Edit button. You will be taken to the Destination Category Data Entry screen (Figure 3-22). This screen will let you change any of the Destination Category information except the Destination Category code. To save the Destination Category information you have changed, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

Deleting an Existing Destination Category

If you wish to remove an existing Destination Category, select a Destination Category on the Destination Category List screen (Figure 3-21) by clicking the row containing the desired Destination Category. Then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this Destination Category. If you do confirm to T.O.M. that you want to delete the Destination Category, T.O.M. will remove the Destination Category from your T.O.M. database. **NOTE:** T.O.M. will not allow you to delete a Destination Category that is being used by a Destination.



Working with Divisions

T.O.M. allows you to group your customers into various divisions. You may have a district with more than one bus yard. Each yard may service a group of schools. You could set up each of these yards as divisions and assign your customers to each yard. You may then inquiry or report on your field trips by division. These divisions are optional. You are not required to create any Divisions.

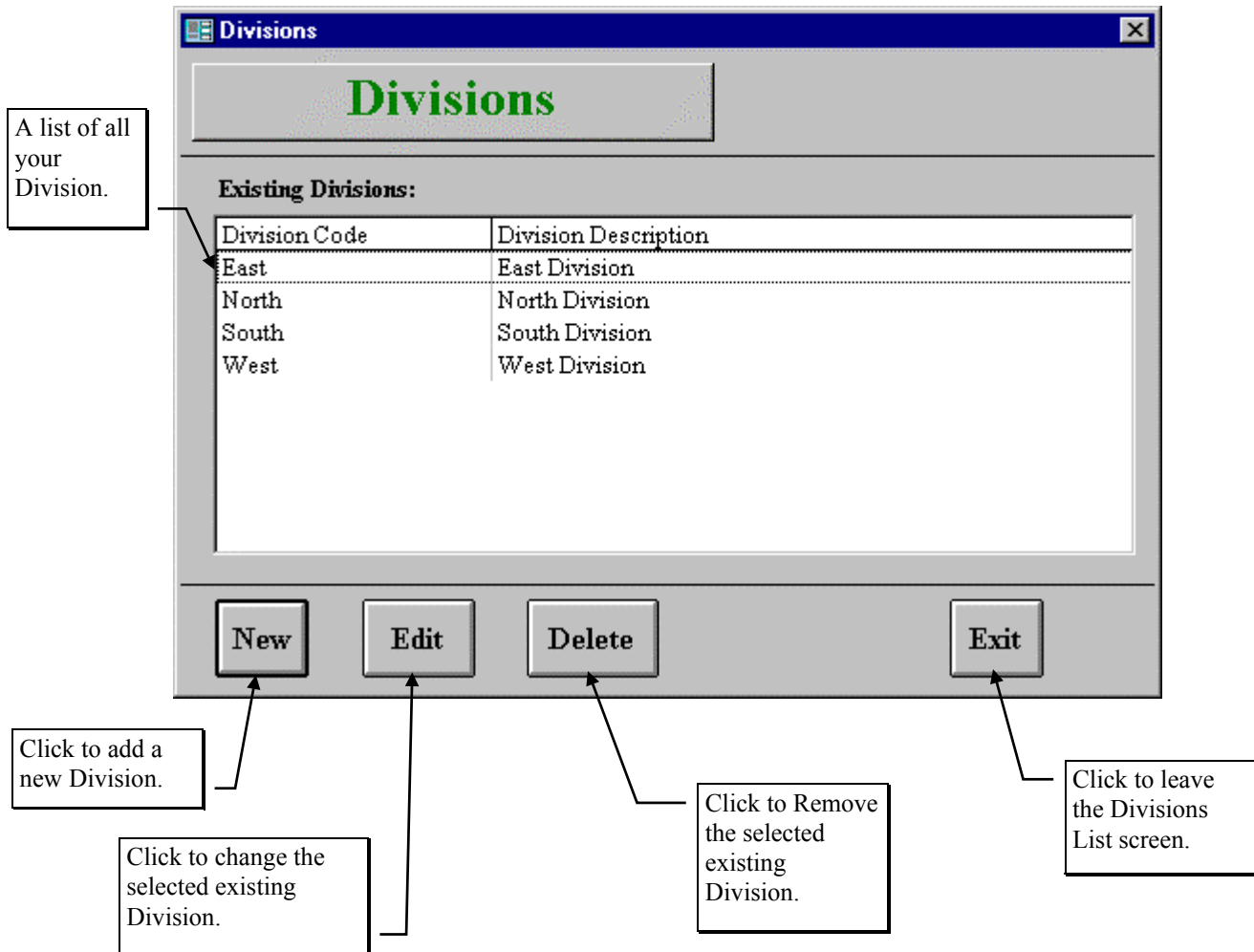


Figure 3-23. The Divisions List Screen

Figure 3-23 is the list screen showing you all of the Divisions that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new Division, change an existing Division and remove existing Division.



Adding a New Division

If you wish to add a new Division, click the New button and you will be taken to the Division Data Entry screen (Figure 3-24). This screen will let you enter all of the Division information. To save the Division information you have entered, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

The screenshot shows a window titled "DIVISIONS" with a close button (X) in the top right corner. Inside the window, the word "Division" is displayed in a large, purple, serif font. Below this, there are two input fields. The first is labeled "Division:" and contains the text "East". The second is labeled "Description:" and contains the text "East Division". At the bottom of the window, there are two buttons: "OK" on the left and "Exit" on the right. Four callout boxes with arrows point to specific parts of the screen: 1. A box on the left points to the "Division:" field with the text: "Division Code (can be up to 15 characters - must be unique to each Division.)". 2. A box on the right points to the "Description:" field with the text: "Long description of Division (50 characters max.)". 3. A box on the bottom left points to the "OK" button with the text: "Click to save the Division information and return to the Division List screen." 4. A box on the bottom right points to the "Exit" button with the text: "Click to return to the Division List screen WITHOUT saving the information that you typed."

Figure 3-24. The Division Data Entry Screen

Changing an Existing Division

If you wish to change an existing Division, select a Division on the Division List screen (Figure 3-23) by clicking the row containing the desired Division. Then click the Edit button. You will be taken to the Division Data Entry screen (Figure 3-24). This screen will let you change any of the Division information except the Division code. To save the Division information you have changed, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

Deleting an Existing Division

If you wish to remove an existing Division, select a Division on the Division List screen (Figure 3-23) by clicking the row containing the desired Division. Then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this Division. If you do confirm to T.O.M. that you want to delete the Division, T.O.M. will remove the Division from your T.O.M. database. **NOTE:** *T.O.M. will not allow you to delete a Division that is being used by a Customer.*



Working with Field Trip Categories

T.O.M. allows you to group your field trips into various categories. These categories can be useful later in analyzing the number of field trips taken to certain types of field trips. For example you could create field trips categories for your various school sports and then report on the number of field trips that were taken for girls basketball in a year. These categories are optional. You are not required to create any field trip categories.

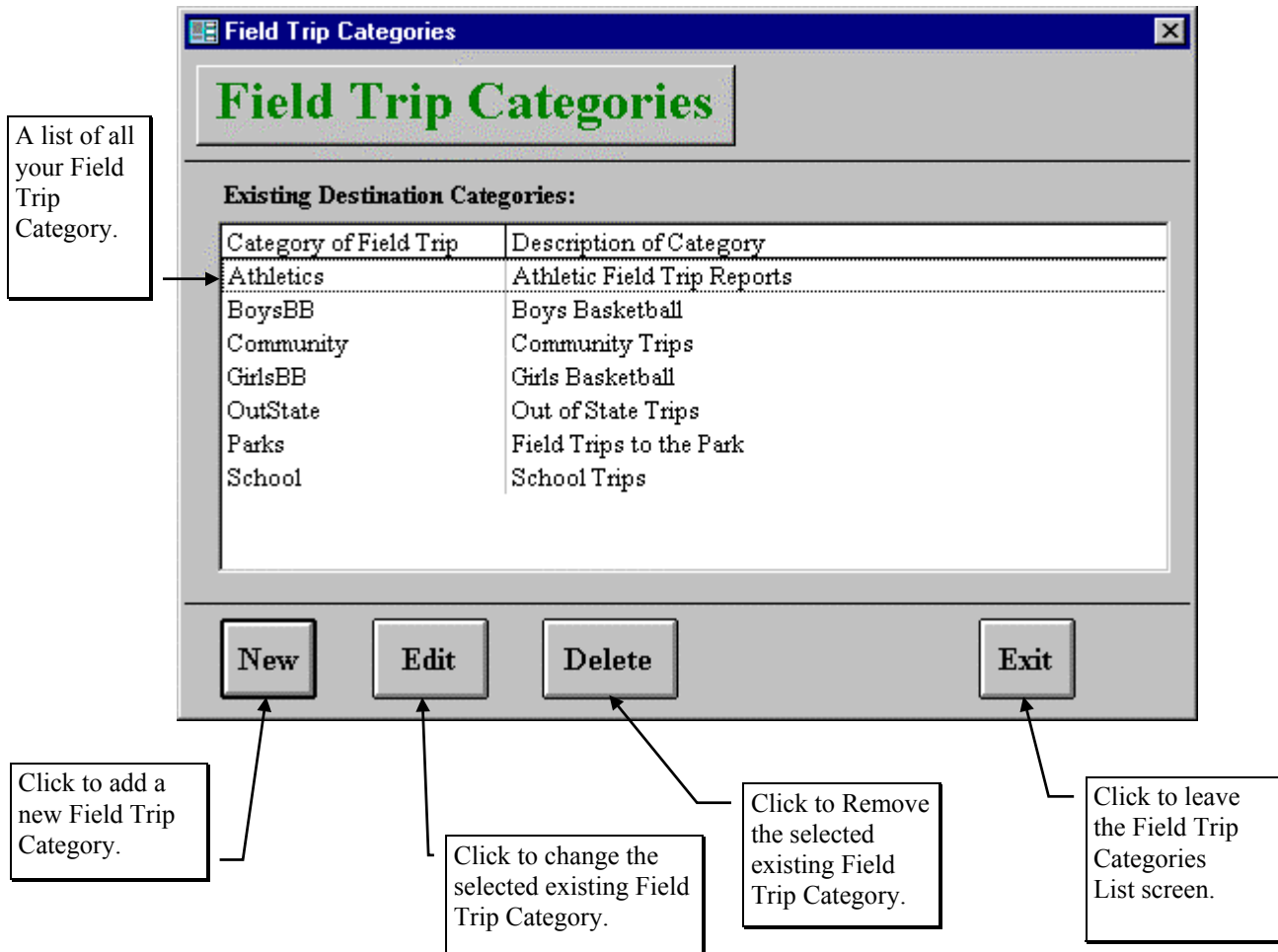


Figure 3-25. The Field Trip Category List Screen

Figure 3-25 is the list screen showing you all of the Field Trip Categories that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new Field Trip Category, change an existing Field Trip Category and remove an existing Field Trip Category.



Adding a New Field Trip Category

If you wish to add a new Field Trip Category, click the New button and you will be taken to the Field Trip Category Data Entry screen (Figure 3-26). This screen will let you enter all of the Field Trip Category information. To save the Field Trip Category information you have entered, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

The screenshot shows a window titled "FIELD TRIP CATEGORIES" with a sub-header "Field Trip Category". It contains two text input fields: "Field Trip Category:" with the value "Community" and "Description:" with the value "Community Trips". At the bottom are two buttons: "OK" and "Exit".

Callouts provide the following information:

- Field Trip Category Code** (can be up to 20 characters - must be unique to each Field Trip Category). This points to the "Field Trip Category:" field.
- Long description of Field Trip Category** (50 characters max.). This points to the "Description:" field.
- Click to save the Field Trip Category information and return to the Field Trip Category List screen.** This points to the "OK" button.
- Click to return to the Field Trip Category List screen WITHOUT saving the information that you typed.** This points to the "Exit" button.

Figure 3-26. The Field Trip Category Data Entry Screen

Changing an Existing Field Trip Category

If you wish to change an existing Field Trip Category, select a Field Trip Category on the Field Trip Category List screen (Figure 3-25) by clicking the row containing the desired Field Trip Category. Then click the Edit button. You will be taken to the Field Trip Category Data Entry screen (Figure 3-26). This screen will let you change any of the Field Trip Category information except the Field Trip Category code. To save the Field Trip Category information you have changed, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

Deleting an Existing Field Trip Category

If you wish to remove an existing Field Trip Category, select a Field Trip Category on the Field Trip Category List screen (Figure 3-25) by clicking the row containing the desired Field Trip Category. Then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this Field Trip Category. If you do confirm to T.O.M. that you want to delete the Field Trip Category, T.O.M. will remove the Field Trip Category from your T.O.M. database. **NOTE:** T.O.M. will not allow you to delete a Field Trip Category that is being used by a Field Trip.



Working with Grades

T.O.M. allows you to create grades for your field trips. These can be useful later in analyzing the number of field trips taken by certain grades. These grades are optional. You are not required to create any grades.

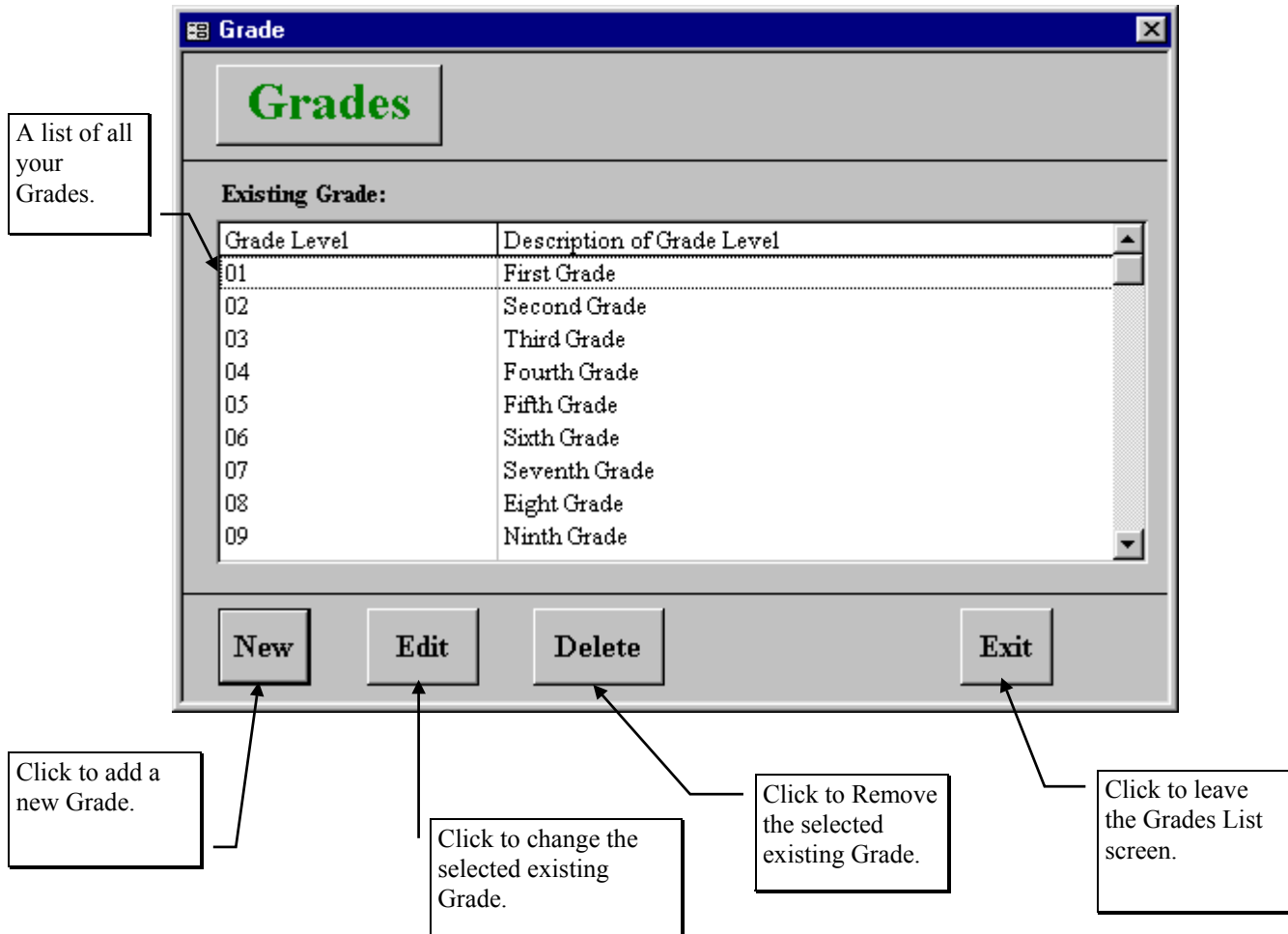


Figure 3-27. The Grade List Screen

Figure 3-27 is the list screen showing you all of the Grades that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new Grade, change an existing Grade and remove an existing Grade.



Adding a New Grade

If you wish to add a new Grade, click the New button and you will be taken to the Grade Data Entry screen (Figure 3-28). This screen will let you enter all of the Grade information. To save the Grade information you have entered, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

Grade Code (can be up to 20 characters - must be unique to each Grade.)

Long description of Grade (50 characters max.).

Click to save the Grade information and return to the Grade List screen.

Click to return to the Grade List screen WITHOUT saving the information that you typed.

Figure 3-28. The Grade Data Entry Screen

Changing an Existing Grade

If you wish to change an existing Grade, select a Grade on the Grade List screen (Figure 3-27) by clicking the row containing the desired Grade. Then click the Edit button. You will be taken to the Grade Data Entry screen (Figure 3-28). This screen will let you change any of the Grade information except the Grade code. To save the Grade information you have changed, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

Deleting an Existing Grade

If you wish to remove an existing Grade, select a Grade on the Grade List screen (Figure 3-27) by clicking the row containing the desired Grade. Then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this Grade. If you do confirm to T.O.M. that you want to delete the Grade, T.O.M. will remove the Grade from your T.O.M. database. **NOTE:** T.O.M. will not allow you to delete a Grade that is being used by a Grade.



Working with Characteristics

T.O.M. allows you to create various driver characteristics. These can be useful later in choosing drivers for certain types of field trips. For example you could create characteristics for drivers who are willing (and able) to drive on mountain roads or who are willing to take overnight trips. T.O.M. uses the Characteristics when automatically assigning drivers to field trips. These categories are optional. You are not required to create any field trip categories. See *Employee Characteristics* in *Chapter 7 – Employees, Their Hours and Schedules* in this manual and **Appendix B – Advanced Field Trip Features** in the *T.O.M. User Guide* for additional details.

NOTE: Gecko recommends that initially you do not attempt to use the characteristics feature of the automatic assignment process. We recommend that you try in the beginning to use the other features of T.O.M. to accomplish in automatic assignment what you are trying to accomplish with characteristics. Characteristics that are assigned to a trip will cause all drivers that do not have these characteristics to be skipped during automatic assignment. So if you have a list of 70 drivers that T.O.M. normal tries when automatically assigning drivers to a field trip and only one of those drivers has the characteristic required by the field trip T.O.M. could in theory skip up to 69 drivers before assigning the one driver with the characteristic. T.O.M. would one by one try to assign each driver, find that the particular driver did NOT have the characteristic required by the field trip and skip that driver and then try another driver. If you use characteristics often you may find that T.O.M. automatic assignment process will run very inefficiently. It is better to try and accomplish most of the same kind of grouping initially with schedules. If you have to many groups of drivers or too many classifications needed for automatic assignment then it makes sense to turn to characteristics.

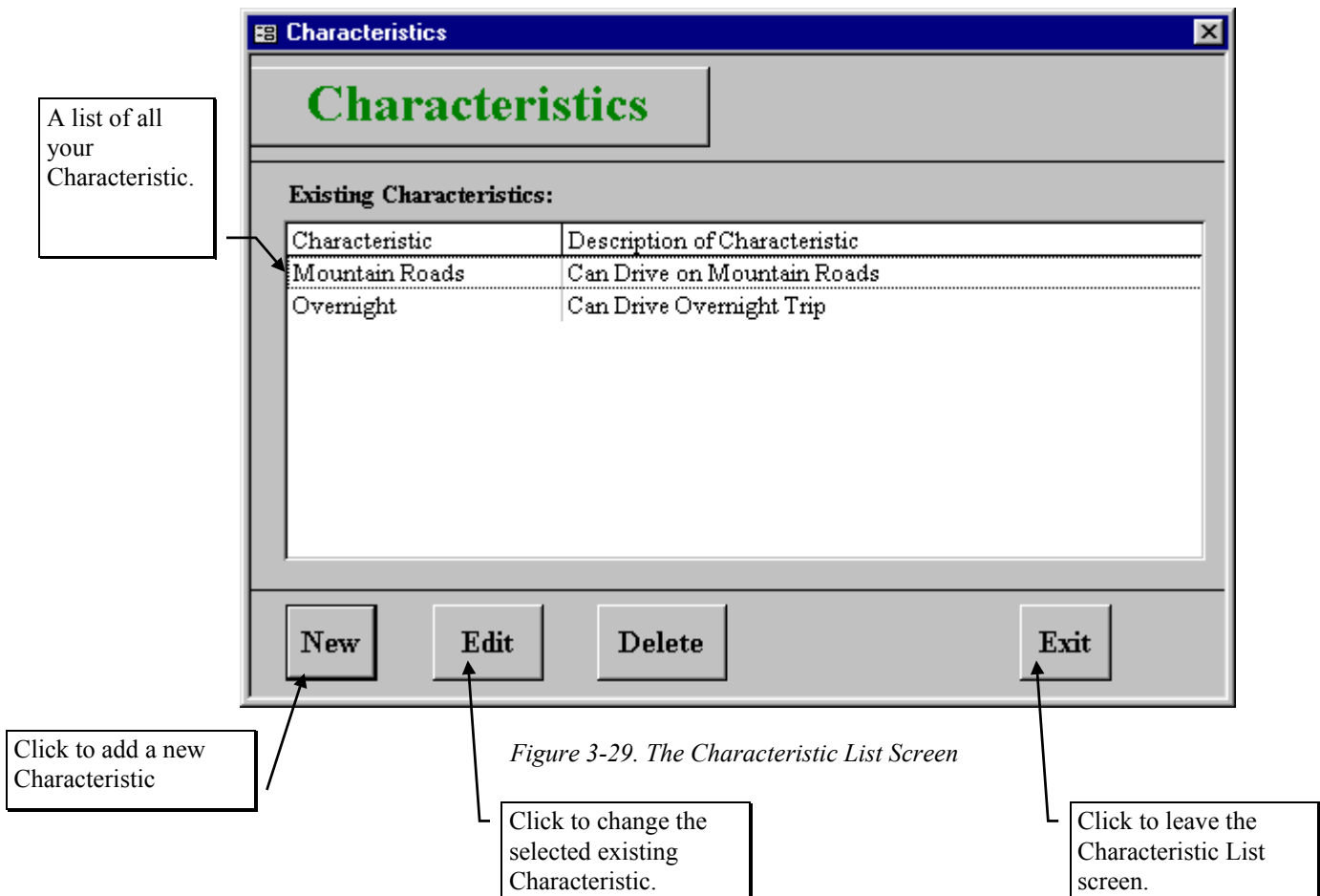


Figure 3-29. The Characteristic List Screen



Figure 3-29 is the list screen showing you all of the Characteristics that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new Characteristic, change an existing Characteristic and remove an existing Characteristic.

Adding a New Characteristic

If you wish to add a new Characteristic, click the New button and you will be taken to the Characteristic Data Entry screen (Figure 3-30). This screen will let you enter all of the Characteristic information. To save the Characteristic information you have entered, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

The screenshot shows a window titled "Characteristic" with a close button (X) in the top right corner. The window contains the following elements:

- A title bar with the text "Characteristic" and a close button (X).
- A large text area at the top with the word "Characteristic" in a large, bold, purple font.
- A label "Characteristic:" followed by a text input field containing "Mountain Roads".
- A label "Description:" followed by a text input field containing "Can Drive on Mountain Roads".
- A label "Active:" followed by a checked checkbox.
- Three buttons at the bottom: "OK", "Add / Remove Employees", and "Exit".

Callouts provide additional information:

- A callout pointing to the "Characteristic:" field states: "Characteristic Code (can be up to 20 characters - must be unique to each Characteristic)."
- A callout pointing to the "Description:" field states: "Long description of Characteristic (50 characters max.)."
- A callout pointing to the "OK" button states: "Click to save the Characteristic information and return to the Characteristics List screen."
- A callout pointing to the "Exit" button states: "Click to return to the Characteristics List screen WITHOUT saving the information that you typed."

Figure 3-30. The Characteristic Data Entry Screen

Changing an Existing Characteristic

If you wish to change an existing Characteristic, select a Characteristic on the Characteristic List screen (Figure 3-29) by clicking the row containing the desired Characteristic. Then click the Edit button. You will be taken to the Characteristic Data Entry screen (Figure 3-30). This screen will let you change any of the Characteristic information except the Characteristic code. To save the Characteristic information you have changed, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

Deleting an Existing Characteristic

If you wish to remove an existing Characteristic, select a Characteristic on the Characteristic List screen (Figure 3-29) by clicking the row containing the desired Characteristic. Then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this Characteristic. If you do confirm to T.O.M. that you want to delete the Characteristic, T.O.M. will remove the Characteristic from your T.O.M. database. **NOTE:** T.O.M. will not allow you to delete a Characteristic that is being used by a Field Trip.



Working with Money Transaction Types

Money Transaction Types allow you to customize the various financial activities that occur with your field trip billing and payment process. You may enter an unlimited number of Money Transaction Types. T.O.M. ships to you with a list of example Money Transaction Types. You do NOT have to use these Money Transaction Types if you do not wish to. Just keep the ones that you like and delete the rest.

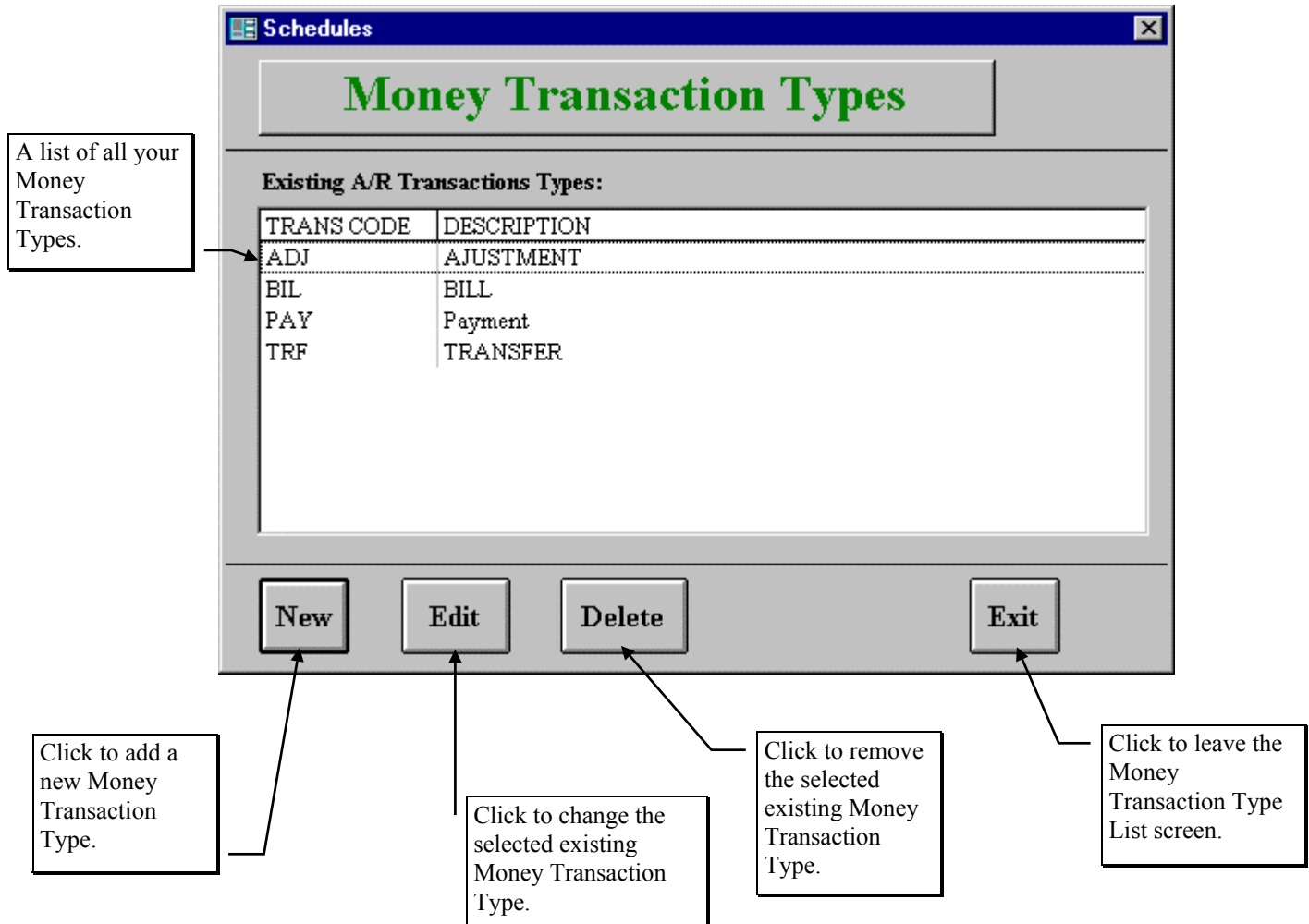


Figure 3-31. The Money Transaction Types List Screen

Figure 3-31 is the list screen showing you all of the Money Transaction Types that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new Money Transaction Types, change an existing Money Transaction Types and remove existing Money Transaction Types.



Adding New Money Transaction Types

If you wish to add a new Money Transaction Types, click the New button and you will be taken to the Money Transaction Types Data Entry screen (Figure 3-32). This screen will let you enter all of the Money Transaction Types information. To save the Money Transaction Types information you have entered, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

The screenshot shows a window titled "A/R TRANSACTION TYPES" with a sub-header "Money Transaction Types". It contains three input fields: "Trans Code:" with the value "TRF", "Description:" with the value "TRANSFER", and "Category:" with a dropdown menu showing "Adjustment". At the bottom are "OK" and "Exit" buttons. Four callout boxes provide instructions: 1. Points to "Trans Code:" with text: "Money Transaction Type Code (can be up to 5 characters - must be unique to each Money Transaction Type)." 2. Points to "Description:" with text: "Long description of Money Transaction Type (30 characters max.)." 3. Points to the "OK" button with text: "Click to save the Money Transaction Type information and return to the Money Transaction Type List screen." 4. Points to the "Exit" button with text: "Click to return to the Money Transaction Type List screen WITHOUT saving the information that you typed."

Figure 3-32. The Money Transaction Types Data Entry Screen

Changing Existing Money Transaction Types

If you wish to change an existing Money Transaction Types, select a Money Transaction Types on the Money Transaction Types List screen (Figure 3-31) by clicking the row containing the desired Money Transaction Types. Then click the Edit button. You will be taken to the Money Transaction Types Data Entry screen (Figure 3-32). This screen will let you change any of the Money Transaction Types information except the Money Transaction Types code. To save the Money Transaction Types information you have changed, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

Deleting Existing Money Transaction Types

If you wish to remove an existing Money Transaction Types, select a Money Transaction Types on the Money Transaction Types List screen (Figure 3-31) by clicking the row containing the desired Money Transaction Types. Then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this Money Transaction Types. If you do confirm to T.O.M. that you want to delete the Money Transaction Types, T.O.M. will remove the Money Transaction Types from your T.O.M. database.

NOTE: T.O.M. will not allow you to delete a Money Transaction Types that is being used by a Field Trip. T.O.M. also prohibits you from deleting the Money Transaction Types BIL and PAY as they are required for T.O.M.'s internal use.