

# PAXTON N LIVE

National Coastwatch Institution

## STATION REFERENCE GUIDE



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Help video links are included on each topic. These can be found on the NCI YouTube channel.

A link to this can be found on [www.paxtonlive.co.uk](http://www.paxtonlive.co.uk)

# LOGGING ON

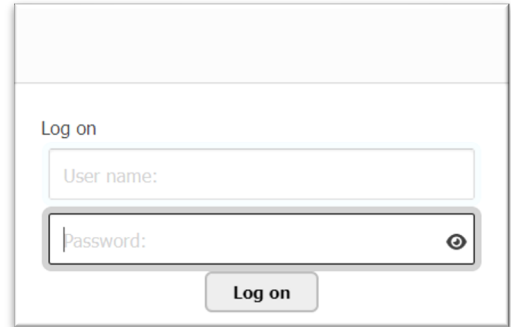
Paxton Live runs through a web browser which can be accessed from any device from any location with internet access. Please be aware that there is an automatic timeout after 30 minutes of inactivity for security reasons.

## STEP 1

Open your web browser and enter the following address:-

[www.paxtonlive.co.uk](http://www.paxtonlive.co.uk)

Click on the Software Logon button.  
Enter your credentials.

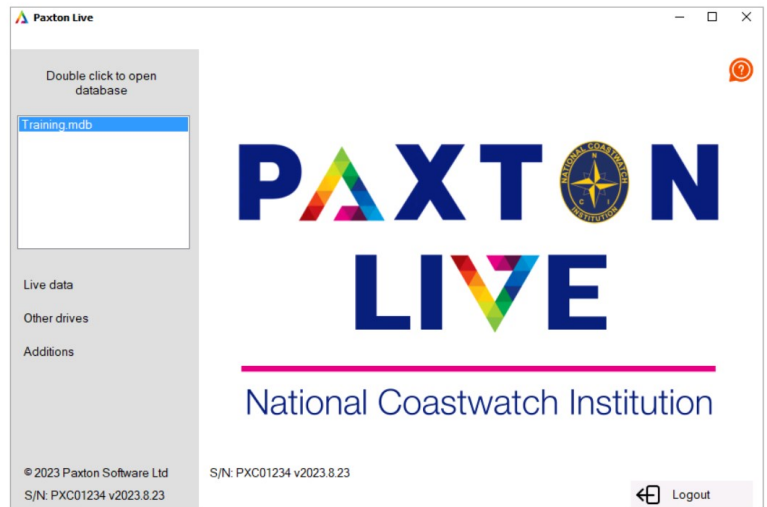


A screenshot of a web browser window showing a login form. The form has a title "Log on" and two input fields: "User name:" and "Password:". The "Password:" field has a small eye icon to its right. Below the input fields is a button labeled "Log on".

## STEP 2

The following login screen will be displayed:-

Click on the **Training data** button and double click on the **Training.mdb** database.



## STEP 3

Log in with your User code and Passcode.

The next time you log in it will remember your user code.





# DRIVING THE SOFTWARE

Here are a few notes on how to use the software which you may find useful as you start to navigate your way around.

- From any screen you can access help by clicking on the ? at the top right.
- All screens can be driven by using the mouse or the keyboard.
- The package is menu driven. A single click on a menu selection will take you to the program. When in the program, the 'Exit' button will take you back to the menu.
- The database is NOT updated from any program until the 'Record' button is pressed. There is always a 'Cancel' button displayed alongside the 'Record' button that allows you to abort the current input.

## Using \* and ^ in Grids

- An asterisk (\*) in a grid column header indicates that extra information can be displayed via a 'double click' in that column for the appropriate grid entry.
- | Date     | Type^ | A/c | Station | Reference | Audit | Value(£) | D* | Comment         |
|----------|-------|-----|---------|-----------|-------|----------|----|-----------------|
| 20/07/23 | MT#   |     | 025     | Transmitt |       | -1000.00 |    | Manual transfer |
- Similarly, a '^' symbol indicates that a 'right click' will display further selections.

## The Navigation Bar



- These navigation controls will appear at the top right of the screen in many of the maintenance and enquiry programs.
- Clicking on the up arrow will select the first record in the group, left arrow the previous record, right arrow the next record and down arrow the last record in the group.
- Where available, the large 'C' icon will display a record count.

The programs in the package are split into four types: **Maintenance, Inputs, Enquiries** and **Reports**.

## **Maintenance Programs**

These programs are used for adding and maintaining the basic elements of the system and are consistent in the way they are driven. An example is Donor Maintenance.

To ADD a new element e.g. a donor: in the Donor Maintenance program, press the Add button, complete the required fields (mandatory entries are marked with an asterisk) and press Record when complete.

To UPDATE an existing element e.g. a donor record: in the Donor Maintenance program, search and select the required donor record, press the Update button, complete the required amendments and press Record when complete.

To DELETE an existing element e.g. a donor record: in the Donor Maintenance program, search and select the required donor record, press the Delete button, you will be asked to confirm that you really mean to delete the record and, if so, the record is deleted. Note that numerous checks are made by the system to ensure that you are allowed to delete the record.

### **Input Programs**

These programs are used to enter transaction data, for example Receipt Input, Payment Input, Gift Aid Donations.

The entry screens are normally split into a header with normal entry fields at the top and a grid in the lower section of the screen for the entry of the detail lines. Mandatory entries are marked with an asterisk.

Movement around the grid section is via the mouse or the up, down, left and right arrow keys (similar to a spreadsheet).

### **Enquiry and Report Programs**

These are fairly self explanatory. See below for a list of the report program search controls.

Don't forget, you are not going to update the database using these programs and so you can experiment with confidence. (Suggest that you start by using Preview rather than Print for reports.)

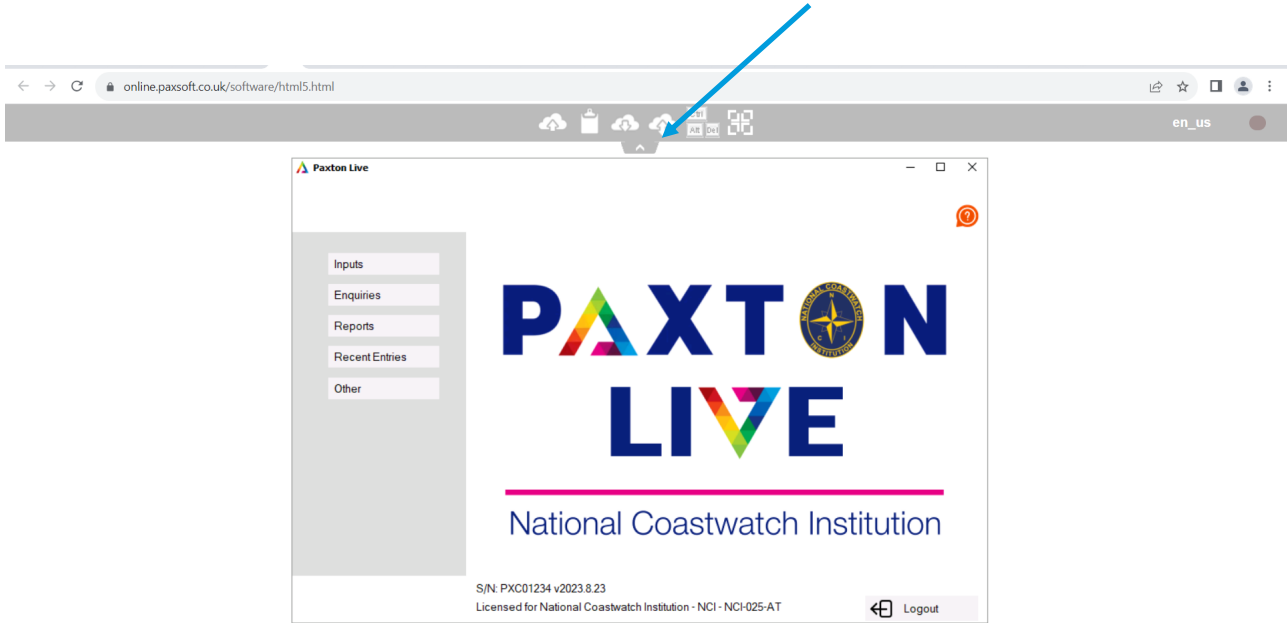
The reports allow you to enter criteria to determine what information is displayed. Where the field has a \* it means that a selection needs to be made. There are a number of different options in the operator field. Here is an explanation of each one:-

<b>any value</b>	all the records are selected.
<b>between</b>	a pair of values must be entered as the start and end values for a range to be selected. The range between "A" and "CZZZZ" would produce a list of records with first character in the range A to CZZZZ [inclusive].
<b>not between</b>	as above, except that records other than those in the range are selected.
<b>like</b>	enables matching using the first character of a code or with the wildcards "%" and "?". The value A% would produce a list of all records starting with the letter "A". ?A% produces a list of items where the second character is "A".
<b>not like</b>	as above, except that records other than those specified are selected.
<b>=</b>	equal to, an exact match.
<b>&lt;&gt;</b>	not equal to.
<b>&gt; / &lt;</b>	greater than (a numeric value), or later (alphabetically or date wise) or less than (a numeric value), or earlier (alphabetically or date wise)
<b>&gt;= / &lt;=</b>	greater than or equal to/ less than or equal to.

# UPLOADING SCANNED DOCUMENTS

Scan all your documents for the entries being made before logging on and save them onto your computer. Ensure that you have a separate document for each transaction.

Click on the grey tab at the top of your web browser screen and this displays the 'Cloud Toolbar':-

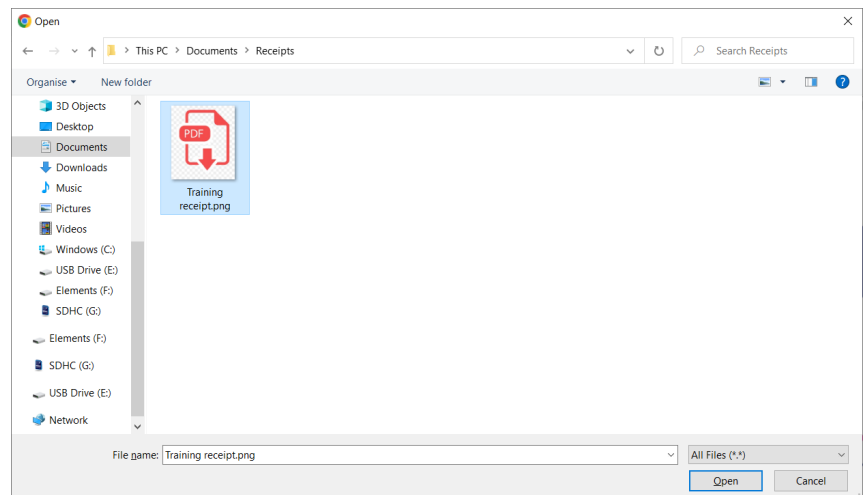


Click on the first icon with a cloud and an up arrow that says 'From PC to server'



This will open another window where you can browse your computer for the document. Double click on the document or single click to select it and click on the Open button.

This will then upload the document to the cloud ready to attach it to your transaction.



# RECEIPT INPUT

## INPUTS > RECEIPT INPUT

Any income that isn't a gift aided donation will be booked through the **Inputs > Receipt Input** screen.

**NOTE:** If you have a document that you wish to attach to the transaction then this must be scanned and uploaded first (see notes on uploading documents)

- Money account** This will default to the main station bank account. Click the down arrow and select an alternative.
- Receipt ref** This should be a reference that would be displayed on your bank statement, this simplifies the bank reconciliation process.
- Total** Enter the total amount of income. This figure may be broken down into different income analysis codes in the grid at bottom half of the screen.
- Reference 1** This should be a reference to where the income has come from.
- Reference 2** Optional, this may be used to record additional information on the income.
- Comment** Optional, this may be used to record additional information on the income.
- Station** This will default to your station code.
- Effective date** This is the date it is booked to the accounts. This can be any date in the past after your finished date. You can type the date in or click on the calendar box.
- Document** You can attach any relating document to the transaction (see notes on uploading files). If no document is attached it will display a confirmation message when you click on Confirm to make sure that a document shouldn't be attached.
- Project code** Leave blank or select from the drop down list if applicable.

### Analysis Grid

- A/C** The A/C (Account) column holds the income code. You can have one line or multiple lines to break down the total received. You can either type the code in or right click to display a list to choose from. The account name will be automatically displayed.
- Value** Enter the amount for this analysis line. You may only have one income analysis line but if you have more than one then the total of all the line values must equal the total entered at the top of the screen.
- VAT** The VAT code will default to 8 which is 0%. This will be used on all receipts inputs.
- Station code** Leave this blank as it will default to the station code at the top of the screen.
- Project code** Leave blank as it will default to the code at the top of the screen if one is entered.
- Reference 2** Only enter something here if you wish to record a different reference 2 for the analysis line.



# PAYMENT INPUT

## INPUTS > PAYMENT INPUT

All expenditure is booked through the Inputs > Payment Input screen. Fill in the relevant fields (those marked with an \* are mandatory).

**NOTE: You must attach a document to the payment which needs to be scanned and uploaded first (see notes on uploading documents)**

- Money account** This will default to the main station bank account. Click the down arrow and select an alternative.
- Payment ref** This should be a reference that would be displayed on your bank statement, this simplifies the bank reconciliation process.
- Total** Enter the total amount of expenditure. This figure may be broken down into different expenditure analysis codes in the grid at bottom half of the screen.
- Reference 1** This should be a reference to what the money has been spent on.
- Reference 2** Optional, this may be used to record additional information on the expenditure.
- Comment** Optional, this may be used to record additional information on the expenditure.
- Station** This will default to your station.
- Effective date** This is the date it is booked to the accounts. This can be any date after your finished date. You can type the date in or click on the calendar box.
- Document** You must attach a scanned document to the transaction (see notes on uploading files).
- VAT number on receipt?** Tick this box if the VAT number is displayed on your scanned receipt.
- Project code** Leave blank or select from the drop down list if applicable.

### Analysis Grid

- A/C** The A/C (Account) column holds the expenditure code. You can have one line or multiple lines to break down the total received. You can either type the code in or right click to display a list to choose from. The account name will be automatically displayed.
- Value** Enter the amount for this analysis line. You may only have one income analysis line but if you have more than one then the total of all the line values must equal the total entered at the top of the screen.
- VAT** The VAT code will default to 1 which is 20%. Change to a different rate is applicable, e.g. 2 which is 5% or 8 which is 0%.
- Station** This will default to the station entered at the top of the screen.
- Project code** Leave blank as it will default to the code at the top of the screen if one is entered.
- Reference 2** Only enter something here if you wish to record a different ref 2 for the analysis line.





# GIFT AID DONATIONS

## DONOR ENTRY

### OTHER > DONOR MAINTENANCE

If you wish to book a donation from a person and you are able to claim Gift Aid then the individuals details must be recorded in the **Other > Donor Maintenance** screen for HMRC purposes. A signed Gift Aid declaration can also be uploaded and attached to the donors details (see notes on uploading documents)

Regular donors can be set as paying via standing order or on a weekly gift basis. Annual pledges can also be accommodated.

Click on Add to add a new donor or Update to change details for an existing donor.

<b>Donor reference</b>	This field will automatically generate the next sequential donor reference.
<b>Name, address, contact etc</b>	Enter the donors details
<b>Send Letter Flag</b>	Set to 'N' if this donor is to be excluded from mailings performed by Group or Head Office. Otherwise set 'Y'.
<b>Gift Aid Flag</b>	Set to 'Y' if this donor has submitted a current Gift Aid declaration. Otherwise set to 'N'. If the flag setting is changed from 'N' to 'Y' then any donations already entered with a date after the 'Gift Aid start date' will be set to Gift Aid'ed and will appear in a future Gift Aid schedule. If the flag setting is changed from 'Y' to 'N', then any donations already entered with a date after the 'Gift Aid cancelled' date that have not been included in a Gift Aid schedule will be unset for Gift Aid.
<b>Gift Aid Start Date</b>	For Gift Aid donors, set the start date of their completed declaration. If the 'Gift Aid start date' is changed then any donations already entered that are effected by the date change that have not been included in a Gift Aid schedule will be set or unset for Gift Aid as appropriate.
<b>Gift Aid Cancelled Date</b>	If Gift Aid no longer applies for this donor then set the cancellation date here.
<b>Gift Aid Declaration File</b>	Upload the file from your computer (see notes on uploading documents) Then click on the button with two dots and select the document you wish to attach. It defaults to a PDF file type so this may need to be changed to 'All files' depending on your file type. This is a mandatory field and the scanned declaration file must be attached
<b>Last Donation Date</b>	This field is automatically maintained by the system as the booked date of the last donation made by this donor and is for information purposes.
<b>Weekly Gift Flag</b>	Set this to 'Y' if this donor makes regular weekly payments. You would then use the Weekly Gifts option in Donation Bookings.



**Annual Pledge and Date** If a pledge has been made by this donor then enter the amount and date of that pledge. When pledges are honoured, they need to be booked via the Donations Bookings program. These fields are not automatically updated and will need to be manually updated as appropriate.

**Inactive Flag** Set to 'Y' if this donor has become inactive.

**Sponsorship Flag** Set to 'Y' if this donor is an agent for the collection of sponsorship monies relating to fundraising events and activities. Name and address must be entered for sponsorship agents. Note that if the agent also donates in their own right then a separate donor record for the same person will need to be added.

**Search Fields** There are two separate, free format fields of up to 20 characters each that can be used to code or classify donors.

**Standing order** As many standing orders as required for this donor can be added via the Standing Order action button (see below). Existing standing orders for the current donor will be listed in the grid at the bottom of the screen. To amend the details of an existing standing order, double click in the '\*' column of the required entry. This will invoke the Standing Order Maintenance program where the details of the standing order can be modified:

**Start date** Enter the date they started or will start donating.

**Value** Enter the amount they donate.

**Frequency** Select the frequency they donate.

**Station** Select your station.

**Money account** Select the correct station bank account.

**Donation account** Optional, this can be entered here or at the of booking.

**Project code** Leave blank or select the appropriate code.

**Last processed date** Leave blank as the system will update this when donations are booked.

**Next due date** Enter the date that the next donation payment is due. Click on Record to save the standing order.



# GIFT AID DONATION BOOKINGS

## INPUTS > GIFT AID DONATIONS

Any income received from a person and you can claim Gift Aid should be booked here. This allows you to keep track of your donors and their donations. You will also need to book them this way to be able to produce a Gift Aid Schedule. Your donor information should be set up in the Donor Maintenance program before any bookings are made. There are two ways of booking donations:-

**Other donations** — Any donations received from a donor

**Standing orders** — Donations paid direct into your bank account on a regular basis

### Other Donations

The donation type at the top right of the screen defaults to this type.

**Reference 1** Enter a reference.

**Reference 2** Optional, this may be used to record additional information.

**Comment** Optional, this may be used to record additional information.

**Money account** This will default to your first station bank account. Click the down arrow and select a different account if applicable.

**Default donation account** Click the down arrow and select the income analysis code for the donation amount. This can be changed against line in the grid below if different to the default.

**GA income account** Click the down arrow and select the income analysis code for the gift aid element of the donation amount. This will only apply to the donors who have the Gift Aid flag set to Y.

**Station** This will default to your station.

**Project code** Leave blank or select from the drop down list if applicable.

**Default date** This is the date it is booked to the accounts. This can be any date in the past in after your finished date. You can type the date in or click on the calendar box. It will use this date for all the donations entered that have nothing in the effective date in the grid below.

### *Donations grid*

**Effective date** Leave this blank if the date of the donation is the same as the default date, if not enter the date.

**Donor ref** Select the donor that made the donation. Either right click to display all donors or double click in this field to search by donor ref, name or address.

<b>Name</b>	This will be automatically entered when the donor is selected.
<b>Amount</b>	Enter the amount of money donated by the donor.
<b>Station</b>	Leave this blank as it will use the default station.
<b>Project</b>	Leave blank or select from the list box
<b>GA</b>	It will default to Y if the Gift Aid flag is set to Y in Donor Maintenance. You can override this to N if you can't claim gift aid on this particular donation.
<b>Donation a/c</b>	This will default to the 'default donation a/c' selected at the top of the screen. If it's different for this donation then right click and select the correct account.
<b>Note</b>	Optional. You can add a note.

When all the information has been entered click on the Confirm button and it will check that nothing is missing. If all is ok then click on the Record button to save and complete the transaction.

### Booking Standing Orders

Select the bank account that you are booking the standing orders for and change the 'default date' to the date you want to book the standing orders up to. Then you can change the donation type at the top right of the screen to standing orders. It will ask you to confirm if you would like to display all standing orders for the selected bank account that have a 'next due date' on or before the date you entered. If this information is correct click on Yes.

You will now see all the donor standing orders. Enter in the missing information at the top of the screen.

<b>Reference 1</b>	Enter a reference.
<b>Reference 2</b>	Optional, this may be used to record additional information.
<b>Comment</b>	Optional, this may be used to record additional information.
<b>Default donation account</b>	Click the down arrow and select the income analysis code for the donation amount.
<b>GA income account</b>	Click the down arrow and select the income analysis code for the gift aid element of the donation amount. This will only apply to the donors who have the Gift Aid flag set to Y.

### *Donations grid*

You can amend any information which may be incorrect. The effective date or value may be different.

You can also delete any lines which haven't been paid into your bank. To do this click on the first column (effective date) of the line you want to remove and click on the Delete Line button. This will just remove it for this donation booking and the standing order will still remain.

When all the information has been entered click on the Confirm button and it will check that nothing is missing. If all is ok then click on the Record button to save and complete the transaction.



# MONEY TRANSFERS

## INPUTS > MONEY TRANSFERS

This screen is used to easily transfer money between your bank and cash accounts. For example you could be moving money into your deposit account from your current account or withdrawing it for petty cash.

<b>Effective date</b>	This is the date it is booked to the accounts. This can be any date in the past after your finished date. You can type the date in or click on the calendar box.
<b>Station</b>	This will default to your station.
<b>From Money account</b>	Click the down arrow and select the money account you are transferring from.
<b>Value</b>	Enter the amount of money you are transferring.
<b>To Money account</b>	Click the down arrow and select the money account you are transferring to.
<b>Value</b>	This will automatically default to the value entered above.
<b>Reference 1</b>	This should be a reference that would be displayed on your bank statement, this simplifies the bank reconciliation process.
<b>Reference 2</b>	Optional, this may be used to record additional information on the transfer.
<b>Comment</b>	Optional, this may be used to record additional information on the transfer.



# BANK RECONCILIATION

## INPUTS > BANK RECONCILIATION

This screen allows transactions entered against the selected money account to be reconciled against a statement received from a bank. Current unreconciled transactions are listed on the screen. Those that appear in the bank statement can be flagged as reconciled and will not be listed the next time that this program is run.

- New or Update** Select as required. The Update option will allow you to preview and, if required, update a previous reconciliation.
- Money account** Click the down arrow and select the money account you are reconciling. Only your station bank accounts will be displayed.
- Reference** If this is a new reconciliation then enter a unique reference. For example you may want to use the name of the bank account and the date you are reconciling up to e.g. NW30/06/23 for a Natwest account reconciled to the end of June 23. If the Update option has been selected then select the required reference from the listbox and press Confirm to display.
- Up to** Either a date or a month can be selected. Unreconciled transactions are shown up to and including the given date or the end of the given month.
- Show** Select whether payments in and/or payments out are to be listed. Also, the 'consolidate' option will generate a single entry for transactions having the same reference and/or date.
- Bank Statement** Enter the closing balance figure from the bank statement. The current imbalance (in the Difference field) will be displayed as each transaction is reconciled. The other fields - System balance, Reconciled balance, etc. are 'display only' fields.
- Reconciled bal:** This is the total of all previously reconciled entries (all reconciled transactions ever entered) and all those entries on the current screen with a Y in the Recon column.
- Difference:** The difference between the **Bank statement** figure and the **Reconciled bal** figure.
- System balance:** This is the total of all transactions in and out of the bank account selected. This includes reconciled and unreconciled entries
- Reconciled total:** This is the total of all entries in the grid below that have been reconciled (have a Y in the Recon column)
- Unreconciled total:** This is the total of all entries in the grid below that haven't been reconciled (have a N in the Recon column)
- Selected total:** This is the total of all the entries in the grid below that have a tick in the + column. This is to allow you to easily add up multiple entries before reconciling them. It works like a calculator. You can use the 'Flip ticked' button to change the Recon column from a N to Y (or vice versa) against all the lines that are ticked. You can also use the Untick button to untick all entries.

# ENQUIRIES

## ENQUIRIES > TRANSACTION ENQUIRY

## ENQUIRIES > STATION ENQUIRY

## ENQUIRIES > DONOR ENQUIRY

There are three different enquiry programs:-

- **Transaction Enquiry**  
This screen displays the notes, balance and transaction details of the selected income, expenditure or money account. You will only see the transactions for your station.
- **Station Enquiry**  
This screen displays the notes, balance and transaction details for your station.
- **Donor Enquiry**  
This screen displays the details of the selected donor, including their donations, notes, standing orders and totals. If a Gift Aid declaration has been attached in Donor Maintenance then it can be viewed using the 'View Gift Aid declaration' button.

All three enquiry screens allow you to drill down into each transaction by double clicking on the '\*' column against the relevant line.

The Transaction Enquiry and the Station Enquiry also allow you to search for transactions by entering a date range and by right clicking on the 'Type' column heading to search for a transaction type, such as 'Inc' for income (Receipt Input).

You can also print the transactions using the Print button, you will need to enter a date range.

### Scanned documents

If you have attached a document to a Receipt or Payment Input then you will see a 'D' in the Document column. You can view this document by double clicking on the D against the transaction line.

# REPORTS

## REPORTS > I&E REPORT

The income & expenditure report will list all your account balances and show a surplus\deficit. The standard options show as a default and all you should need to do is enter a period selection.

- Period** Select whether the report is to be produced for a month, quarter, year to date or date range.
- Station** You are only able to produce this report for your station, which will be automatically displayed.
- Report title** Appears at the head of the printed report.
- Print account codes** Select whether the account code is to be printed alongside each account name.
- Negative values format** Select whether negative values are to be shown between brackets or with a leading or trailing minus sign.
- Summary/Detailed** Select the required option. The 'summary' report will output the titles of the selected sections with a consolidated total for each. The 'detailed' report will output the full account code list with values for each of the selected sections with a sub total at the end of each section.
- Exclude zero values** Check this box if zero value lines are to be suppressed.
- Station accounts only** Outputs the reports showing only those accounts that have been set as restricted via the Nominal Maintenance program to the selected station code, this is maintained by group / head office.
- Show BS totals** Check this box if summary totals for money accounts, debtors, creditors and other assets and liabilities are to be shown at the end of the report.
- Unrounded numbers** Check this box if values to 2 decimal places (i.e. values including pence or cents, etc) are to be shown on the report. Otherwise, the report will show rounded values.

All report sections relating to nominal accounts of type 'income' and 'expenditure' are listed in the grid in the bottom half of the screen. The following controls are available within the grid to design the required report :-

- Include** All sections are automatically included. Untick any sections that you don't want to appear on the report.
- Order** Select the order the section will be on the report.
- Running total** Check this box to output a running total at the end of this section. Remember that the system automatically outputs a sub total after each section. Hence, this running total will only be required if a sub total of multiple continuous sections is required. Note that when a running total is output it is reset to zero.
- New page** Check this box if a new page is required in the report after this section has been output.





# REPORTS

## REPORTS > CASH MOVEMENT REPORT

This report shows all the money in and out of the selected bank account for the selected time frame.

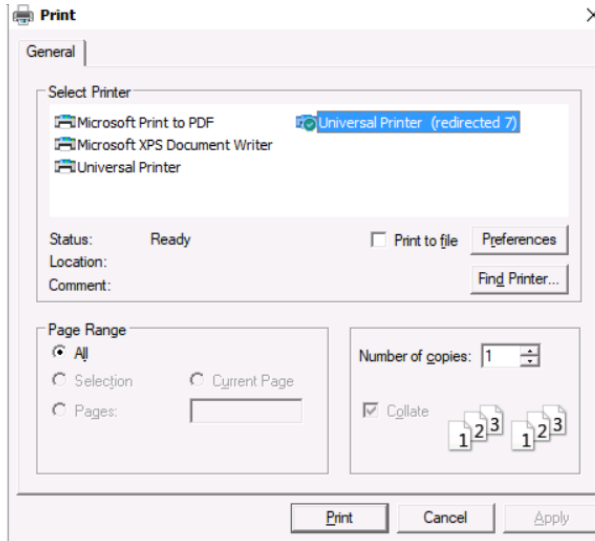
You can make the following selections:-

- Account** It will default to your stations current account. Click the down arrow and select a different account if required.
- Period** You can run the report for a month or a date or date range. If you select Month you will be able to select the month you wish in the next selection box. If you choose date you have different selections:-
- Any value** Will display transaction with any date (therefore every transaction ever entered)
  - Between** Allows you to enter a date (dd/mm/yy) range
  - =** Will display transactions only for that particular date
- Station** This will default to your station code.

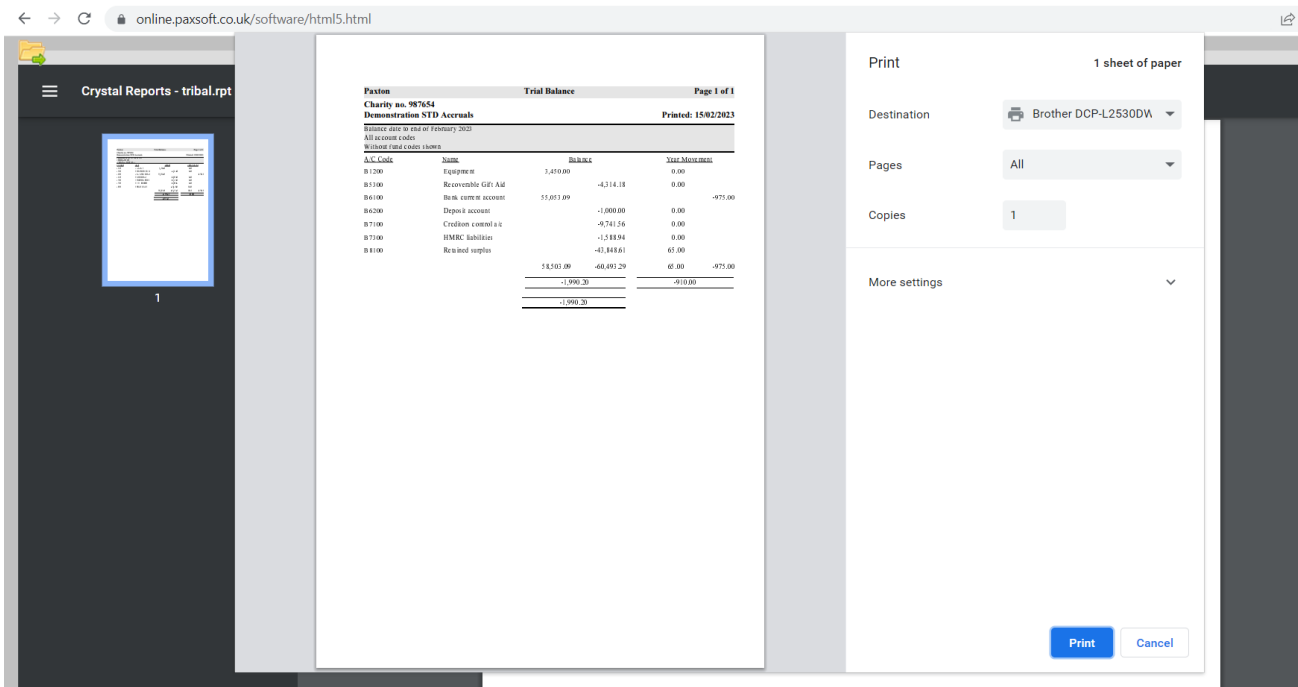
# PRINTING

Any report can be printed to your local printer.

After clicking on the Print button on your desired report you will see the following screen:-



Select the Universal Printer (redirected) option and click on Print.

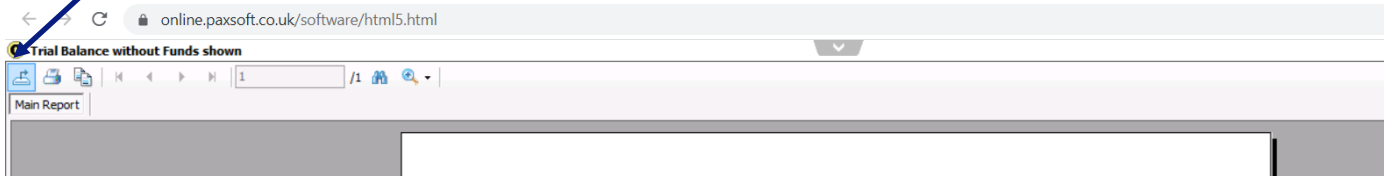


It will create a PDF preview and show your local Windows default printer. You can change this if you wish to use a different printer.

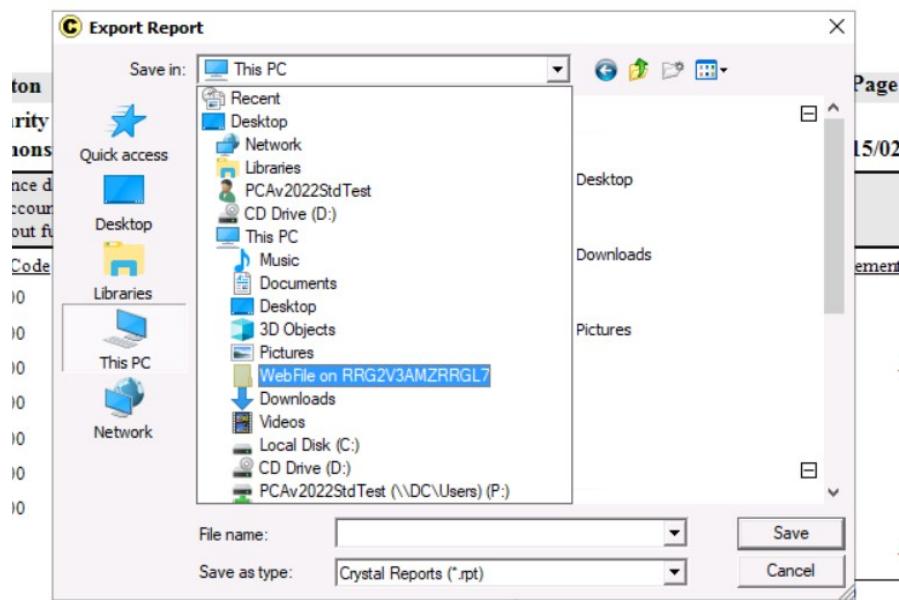
Try this when you have access to a printer.

# EXPORTING

Preview the report that you wish to Export and click on the Export icon at the top left of the preview window.

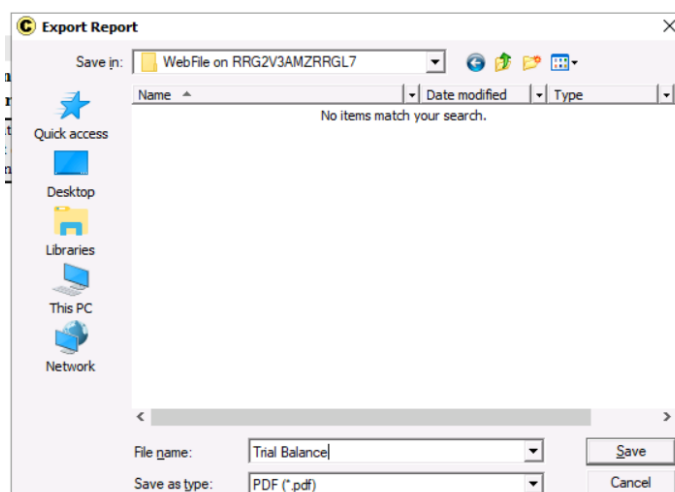


Click the down arrow next to 'Save in' and choose 'WebFile on ...'. This will download the report straight into the downloads folder on your local computer.



Enter your file name and file type, e.g. PDF and click on Save.

Depending on your web browser you should get the option to Save or Open the file. If you choose Save it will open your Downloads folder for you to be able to copy and paste the file into the desired location. If you choose Open then it will open the document and you can choose to print or save it from there.





# CORRECTING MISTAKES

Paxton is very forgiving if a transaction is booked in error. All transactions with a date after your 'finished to date' can be amended or deleted.

The following procedure would be used to rectify a mistake made in any type of transaction. As an example, suppose that a Receipt Input between the Bank Account and the Donations Account, had been entered in error. This could be rectified as follows :-

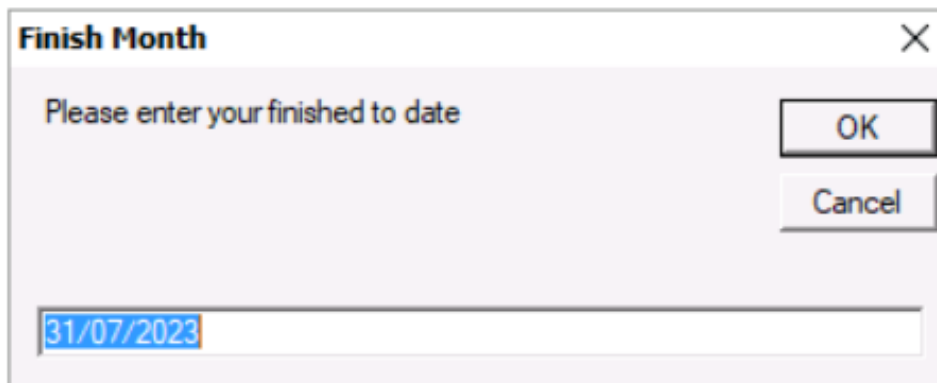
- In Transaction Enquiry, select the bank account used or the donations received account.
- Find the transaction entered in error. You can narrow down the displayed transactions by date or by type. Double click in the '\*' column against the transactions line of the erroneous transaction to display it.
- Press the Change button. You will only see the Change button if the effective date is after your 'finished to' date.
- Select whether you wish to Delete the transaction or Change the transaction. If you select Delete, then the current transaction will be deleted after confirmation that you wish to do so. If you select Change, then the details will remain on the screen for you to amend i.e. correct the mistake BUT make sure that you Confirm and Record the amended transaction otherwise it will be lost.

# FINISHING A MONTH

## OTHER > FINISH MONTH

When you have finished entering all your transactions for a month you need to mark it as finished. From the main menu click Other then Finish Month.

It will ask you to enter the date of the last day of the month your are finishing. Please enter as dd/mm/yyyy and click on OK.



The screenshot shows a dialog box titled "Finish Month" with a close button (X) in the top right corner. The main text inside the dialog reads "Please enter your finished to date". On the right side, there are two buttons: "OK" and "Cancel". At the bottom of the dialog, there is a text input field containing the date "31/07/2023".

This will then prevent any entries being made or changed up to and including the date entered. You are unable to enter a finish month date that is before your previously finished month.

If you find that you need to make or change any transactions before that date you will need to speak to your group treasurer who will be able to change this for you.

# COLOUR SCHEME

## OTHER > COLOUR SCHEME

This screen allows you to change the colour scheme for your user login. The colours can be changed to the current Windows colour scheme, the default Paxton scheme, or customised to your preferences.

### *Set colour scheme*

These three options determine the operation of this program. Select the required option -

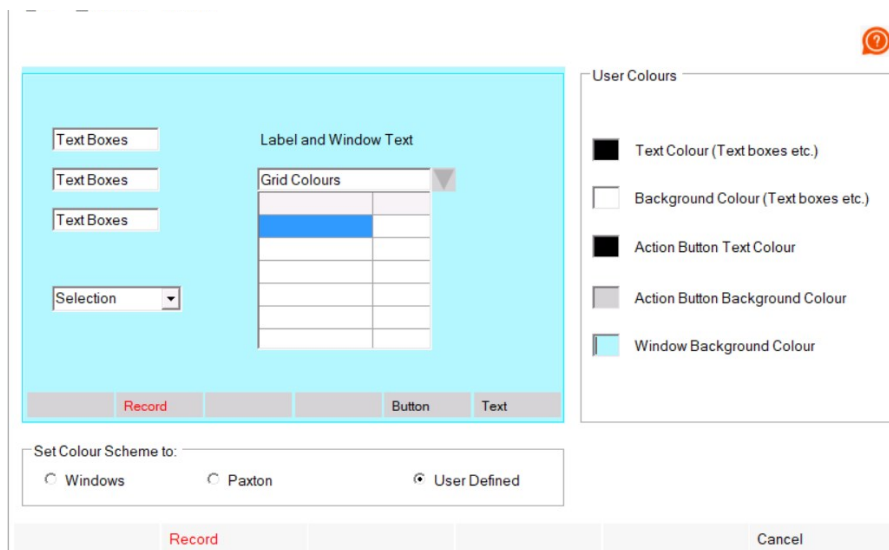
- 'Windows'** Will adopt the scheme currently set via your Windows system settings.
- 'Paxton'** Will cause the package to adopt its own default colour scheme.
- 'User defined'** Will enable you to choose the particular colour scheme for each screen in the software as selected in the right hand side of the screen.

**Update** Only relevant when 'User defined' is selected. Allows the currently displayed user defined colours to be modified for the selected screen component.

**Exit** Returns you back to the menu.

**Record** Writes away the currently displayed details. Details can subsequently be modified using 'Update'.

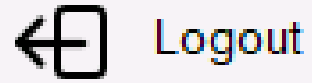
**Cancel** When in 'Record' mode will ignore any new selections.



The screenshot displays the 'COLOUR SCHEME' configuration interface. It features a central preview window showing a light blue background with several 'Text Boxes' and a 'Grid Colours' table. To the right, the 'User Colours' panel allows for customizing five elements: Text Colour (black), Background Colour (white), Action Button Text Colour (black), Action Button Background Colour (grey), and Window Background Colour (light blue). Below the preview, the 'Set Colour Scheme to:' section has three radio buttons: 'Windows', 'Paxton', and 'User Defined' (which is selected). At the bottom, there are 'Record', 'Button', and 'Text' buttons, and a 'Cancel' button on the far right.

# LOGGING OFF

To log out correctly click on the Logout button.



Then click on OK to Close Paxton Live.

