

Admin Mode: Institution, Expense Category & Merchant

Log onto Therap

1. Go to www.TherapServices.net
2. Click on  **Secure Login**
to Therap Applications
3. Enter your **Login Name**, **Password** and **Provider Code**

If you are a **Provider Administrator (PA)**, login to your PA account to perform the following actions.

If you are a **regular user**, the Administration mode allows the staff to create new Institution, Expense Category and Merchant for the Personal Finance module. It also allows the staff to edit the existing entries in those categories. On the Administration Mode page you can use the Admin Capabilities assigned to you for Personal Finance.

If you are a regular user, click on the **Switch to Administration Mode** link under the 'Admin FirstPage' area.

Test FirstPage
Switch to Test mode
Admin FirstPage
Switch to Administration mode
FirstPage Summary
Switch to FirstPage Summary
FirstPage Summary Preferences

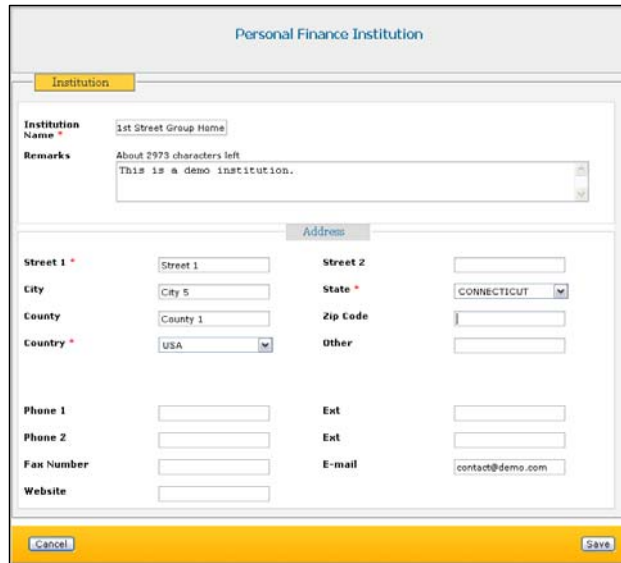
Personal Finance Institution:

1. Click on the **Create New Institution** link in the 'Personal Finance' area.

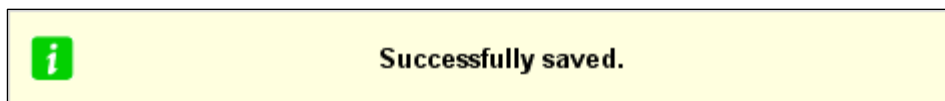
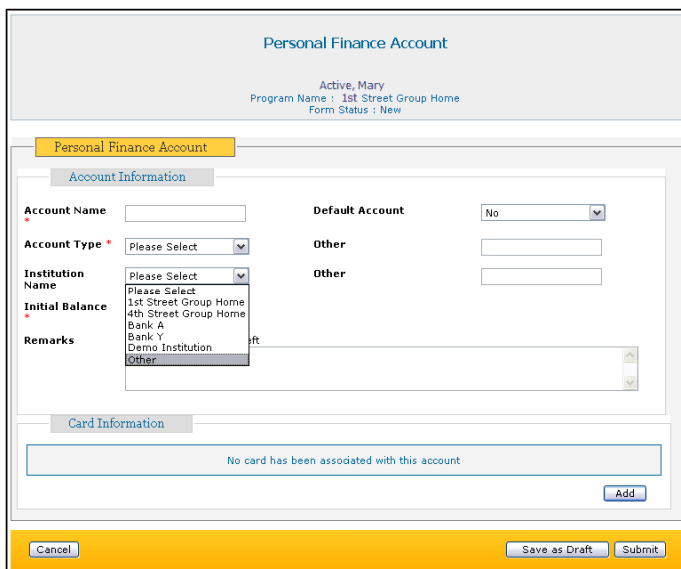
Personal Finance ^{BETA}		
Institution	Expense Category	Merchant
Create New Institution	Create New Expense Category	Create New Merchant
Institution List	Expense Category List	Merchant List
Import Institution (Excel)		Import Merchant (Excel)

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2. On the **Personal Finance Institution** page, enter the required information such as Institution Name, Street, State, and Country, among others. Then click on the **Save** button at the bottom of the page to store the information.



3. You will then receive a Success Message.

The list of the names of institutions created using this process will now appear in the drop down for 'Institution Name' on the **Personal Finance Account** page.

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Personal Finance Expense:

1. Click on the **Create New Expense Category** link in the 'Personal Finance' area.

Personal Finance ^{BETA}		
Institution	Expense Category	Merchant
Create New Institution	Create New Expense Category	Create New Merchant
Institution List	Expense Category List	Merchant List
Import Institution (Excel)		Import Merchant (Excel)

2. Enter the information in the 'Label' and 'Description' fields on the **Personal Finance Expense Category** page and click on the **Save** button.

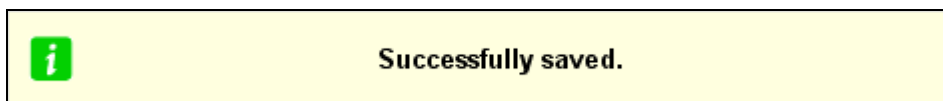
NOTE: To add more rows, click on the **Add** button.

Personal Finance Expense Category

Expense Category

Label	Description
<input type="text" value="Bread"/>	<input type="text" value="Food"/>
<input type="text" value="Shirt"/>	<input type="text" value="Cloth"/>
<input type="text" value="Vitamins"/>	<input type="text" value="Medicine"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

3. You will then receive a Success Message.



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Personal Finance Transaction

Active, Mary
Program Name: 1st Street Group Home

Expense

Account Name *	Card Name	Expense Category *	Expense Date *	Amount *	Merchant	Reported By *	File	Details
Amy Activ	Bank Y	Please Sel	10/07/2008	300	Please Sel	Tim Doe, i	Attach Scan	Details
Please Sel	Please Sel	Please Select Bread	10/07/2008		Please Sel	Tim Doe, i	Attach Scan	Details
Please Sel	Please Sel	Shirt	10/07/2008		Please Sel	Tim Doe, i	Attach Scan	Details
Please Sel	Please Sel	Vitamins	10/07/2008		Please Sel	Tim Doe, i	Attach Scan	Details
Please Sel	Please Sel	Please Sel	10/07/2008		Please Sel	Tim Doe, i	Attach Scan	Details
Please Sel	Please Sel	Please Sel	10/07/2008		Please Sel	Tim Doe, i	Attach Scan	Details

Add More

The list of the names of institutions created using this process will appear in the drop down for 'Expense Category' on the **Personal Finance Transaction** page.

Merchant:

1. To create a new Merchant, click on the **Create New Merchant** link in the 'Personal Finance' area.

Personal Finance ^{BETA}

Institution	Expense Category	Merchant
Create New Institution	Create New Expense Category	Create New Merchant
Institution List	Expense Category List	Merchant List
Import Institution (Excel)		Import Merchant (Excel)

2. Enter the data in the fields as required and click on the 'Save' button at the bottom of the page.

Personal Finance

Merchant

Organization Name *

Remarks

Address

Street 1 * Street 2

City State *

County Zip Code

Country * Other

Phone 1 Ext

Phone 2 Ext

Fax Number E-mail

Website

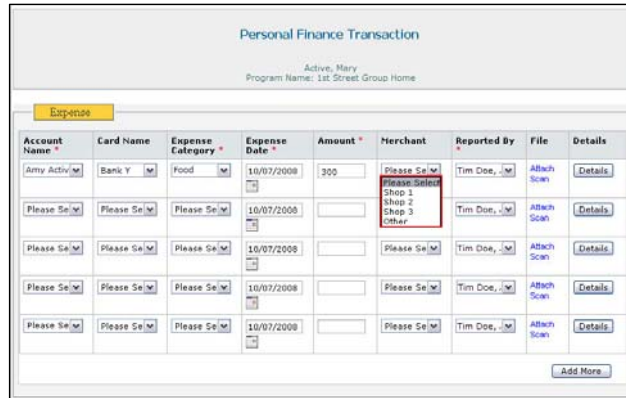
Cancel Save

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3. You will receive a Success Message when the data is saved.

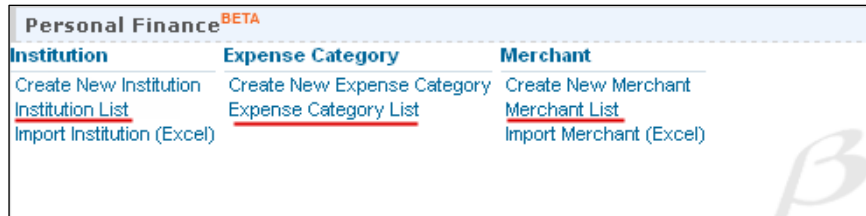


4. The list of the names of institutions created using this process will appear in the drop down for 'Merchant' on the **Personal Finance Transaction** page.

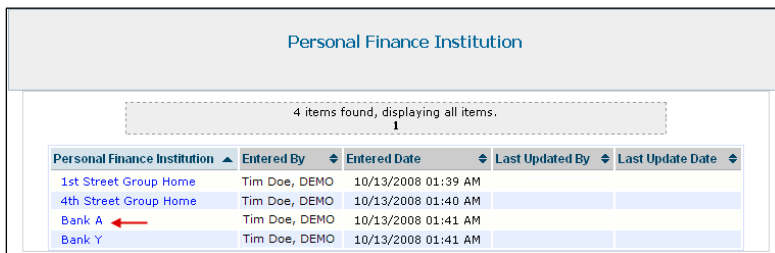


Edit List of Institutions, Expense Categories or Merchants:

You can edit the list of Institutions, Expense Categories or Merchants from the respective lists.



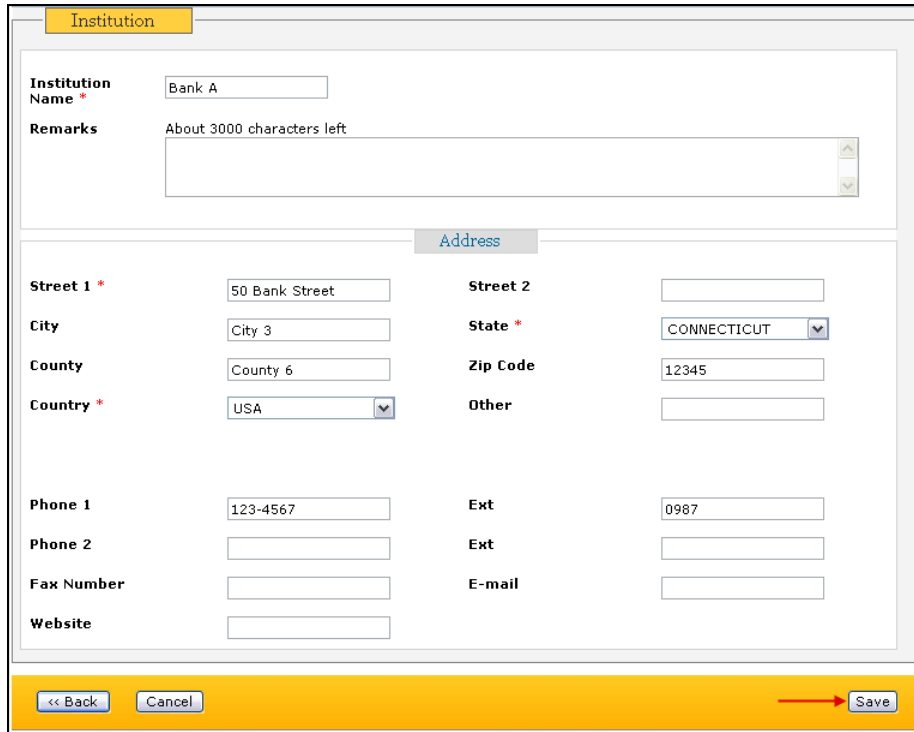
For example: To edit an entry in the list of **Institutions**, follow the steps shown.



1. On the **Personal Finance Institution** list, click on the name of the Institution.

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2. Make the necessary changes on the form and click on the **Save** button to update the form.



3. You will then receive a Success Message.



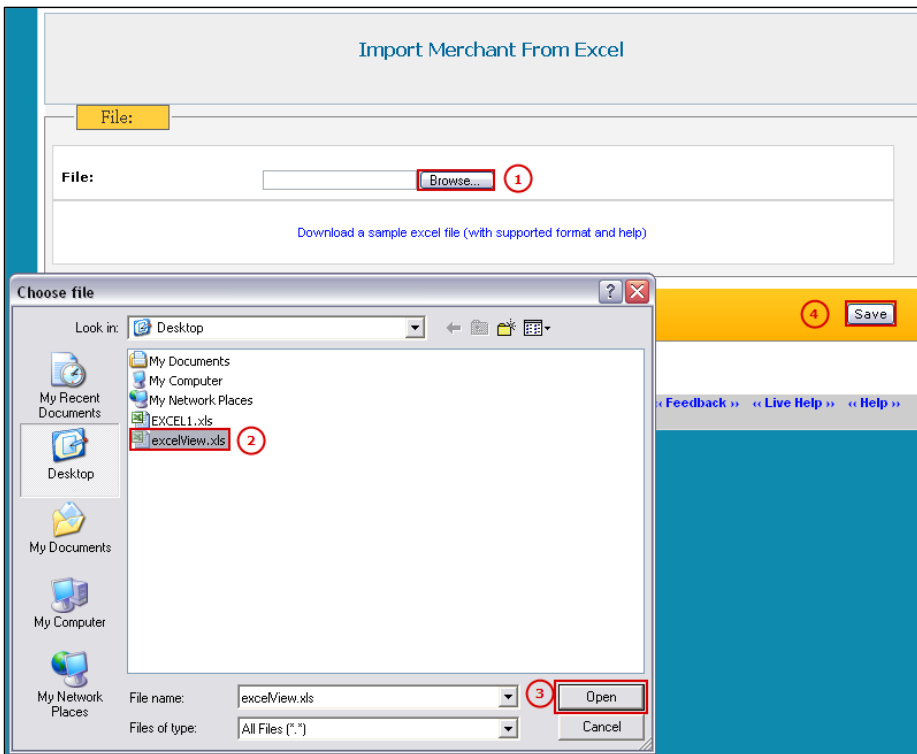
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Importing Data from Excel Sheets:

You can import data directly into the forms from Excel Sheets.

For example, to Import Merchant from Excel sheets follow the steps shown below.

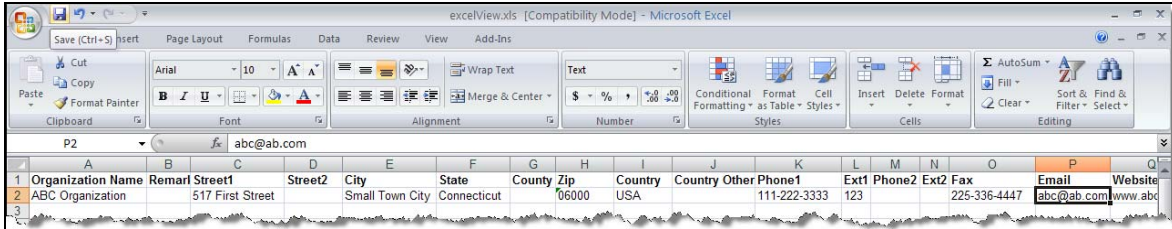
1. On your **FirstPage**, click on the **Import Merchant (Excel)** link in the 'Personal Finance' section.



2. To add the information from the Excel sheet, click on the 'Browse' button on the **Import Merchant From Excel** page. After selecting the file from your computer, click on the 'Open' button to add the file and then click on the 'Save' button.

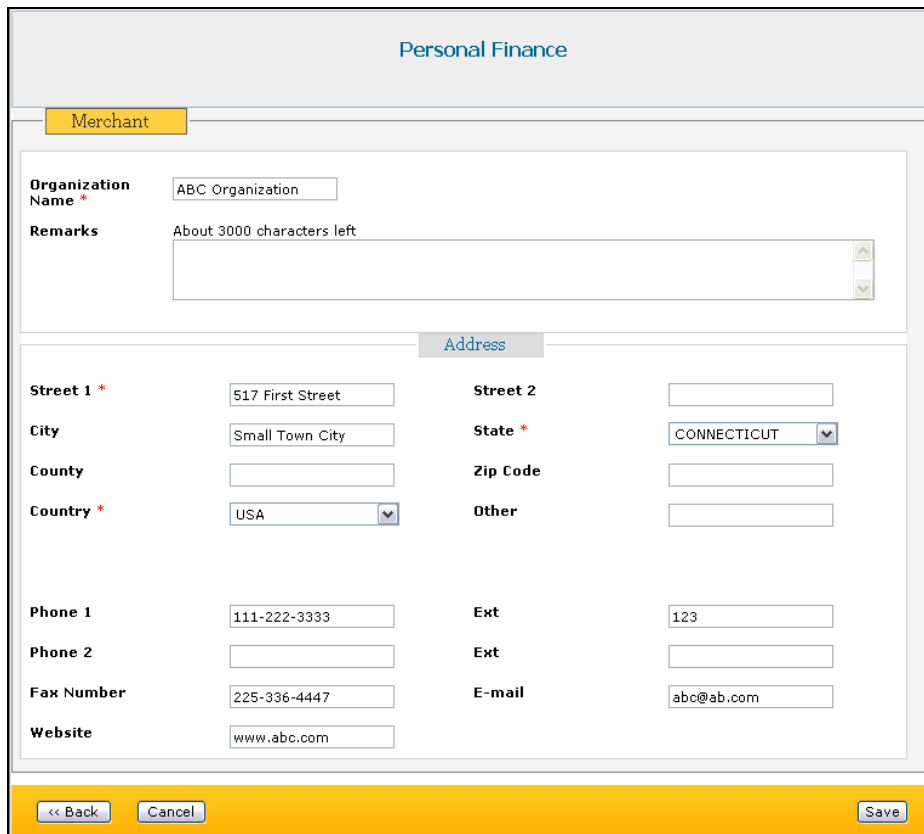
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NOTE: You can download a sample Excel file by clicking on the **Download a sample excel file (with supported format and help)**. The Excel file to be uploaded should be written in the order shown in the sample Excel file.



1	Organization Name	Remark	Street1	Street2	City	State	County	Zip	Country	Country Other	Phone1	Ext1	Phone2	Ext2	Fax	Email	Website
2	ABC Organization		517 First Street		Small Town City	Connecticut		06000	USA		111-222-3333	123			225-336-4447	abc@ab.com	www.ab
3																	

3. The data will then be entered into the form automatically.



Personal Finance

Merchant

Organization Name * ABC Organization

Remarks About 3000 characters left

Address

Street 1 * 517 First Street **Street 2**

City Small Town City **State *** CONNECTICUT

County **Zip Code**

Country * USA **Other**

Phone 1 111-222-3333 **Ext** 123

Phone 2 **Ext**

Fax Number 225-336-4447 **E-mail** abc@ab.com

Website www.abc.com

<< Back Cancel Save