## Financial- How to add a fee/adjustment to multiple families within a room

How to add a fee or adjustment to multiple family ledgers at once (by room/program).

From the main menu, select Reports then select Room/Program.

☆	Home	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setu	ρα
(	Home	Informati	on						Program	n		
									Paymen	it		
	•			ولسلع	Clas	ssroom	List		Child			
				31	Center	r			Misc			
	Information	S	chedules	Semester	DCW	/ Transac	tional- CEN	ITER 1	Batch Jo	ob Audi	t	Care Registrat
	11			1	DCW	/ Transac	tional- CEN	ITER 1	Custom			MC Registrat
	<b>**</b>		é	- <b>-</b>	DCW	/ Transac	tional- CEN	ITER 1	Room/F	rogram		MC- calenda
	Birthday		Billing	Pending	DCW	/ Transac	tional- CEN	ITER 1	Financia	al	J	ool Care (Rec
					DCW	/ Transac	tional- CEN	ITER 1			- LK	ons

Select General from the Report Category drop down menu

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6	Select a Report Category	A		
	Attendance			
	Child/Family			•
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	Enrollment			Create Report
_	General			

Then select Online

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Room Reports		Qui	ck Search	Report Name or Report Cate	Q
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Center			Online		2
<b>1</b>			As PDF -	Future	,

Select search criteria, the only required field to select to add fees is a Classroom- other fields are optional

Enter a date- the date will pull children scheduled for the week associcated to the entered date

## Then select Create Report

oom Reports		Quick Search Report Name or Report Cate	gory
Report Category		Report	
General	•	N Online	-
Online Report			
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Semester			Show A
<b>.</b>			-
Category		Classroom	
•••	-	DCW Transactional- CENTER 1 - AM, I	Before School Care ( 🤜
From Date			
			Create Report

Scheduled children will display below the Search Criteria section, select the checkbox next to the student name columm to select all children, or select the checkbox next to each child to select mulitple or individual children the fee should be applied to

nmary View	Ratio View	Schedule Staff Nu	mbers	4	Actual S	Staff N	umbers	5			
Student List - Feb 2019 - AM, Before School Care (Recurring Billing Room, Monthly)											
		Birthday	Mon	Tue	Wed	Thu	Fri	Guardians	Notes		
ob		10/12/2011	1	7	4			Balbo & Berylla			
'n		08/08/2008	4	1	1	1	1	Debra Mignola & Johnny			
ireen		10/01/2008	1	1	1	1	1	Debra Mignola & Johnny			
	nmary View 119 - AM, Befor do on Green	nmary View Ratio View 19 - AM, Before School Care (Red do on Green	Animary View Ratio View Schedule Staff Nu Anitary School Care (Recurring Billing Room, Birthday do on 08/08/2008 Green 10/01/2008	nmary View Ratio View Schedule Staff Numbers	nmary View Ratio View Schedule Staff Numbers A 19 - AM, Before School Care (Recurring Billing Room, Monthies) do do on Sreen 10/12/2011 of 10/01/2008 of of Sreen 008/08/2008 of 10/01/2008 of of 10/01/2008 of 10/01/2008 of 10/01	Actual S   Birthday   Mon   Actual S   Actual S   Actual S   Birthday   Mon   Actual S   Actual S   Birthday   Mon   Actual S   Actual S<	Actual Staff Number Actual Staff Number   Actual Staff Number Birthday Mon Tue Wed Thu   Ado In/12/2011 Actual Staff Number Actual Staff Number Mon Tue   Ado In/12/2011 Actual Staff Number Actual Staff Number Mon Tue   Ado In/12/2011 Actual Staff Number Actual Staff Number In/12/2011 In/12/2011<	nmary View   Ratio View   Schedule Staff Numbers   Actual Staff Numbers     D19 - AM, Before School Care (Recurring Billing Room, Monthly   Mon   Tue   Wed   Thu   Fri     do   10/12/2011   Image   <	nmary View   Ratio View   Schedule Staff Numbers   Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Actual Staff Numbers     Birthday   Mon   Tue   Wed   Thu   Fri   Guardians     Actual Staff Numbers     Actual S		

Scroll down to the next section of the screen and select the Add Fee tab

Classroom Change	Add Fee	Merge Documents	
	J		
Move to Classroom			
*			•

In the Adjustments section of the screen select an adjustment type, enter the amount of the fee/adjustment, the date the fee is being applied and any note that should be included (the note will display to parents on their statement)- then press Add

Adjustm	ents				
Adjustment	Туре		Amount		
A A	Activity Fee	-	*	25	
Date			Note		
<b>*</b> 0	02/19/2019		**	Note for Activity Fee	

A confirmation box will display, press Ok to complete the process



The fee/adjustment has been added to the family's ledger, continue this process as needed.

0	🃎 dcw_k	kgass	02/19/2019	Clayton Giant - Activity Fee - DCW Transactional- CENTER 1 Note for Activity Fee	25.00	25.00	-696.10	×
0	🃎 dcw_k	kgass	02/19/2019	Jolly Green Giant - Activity Fee - DCW Transactional- CENTER 1 Note for Activity Fee	25.00	25.00	-671.10	×
				Classes Class Manual Face DCM/Tarabasi				

## Process Notes:

- A specific Room/Program MUST be selected in the search criteria
- If a family is split, the fee will automatically allocate to the first parent