

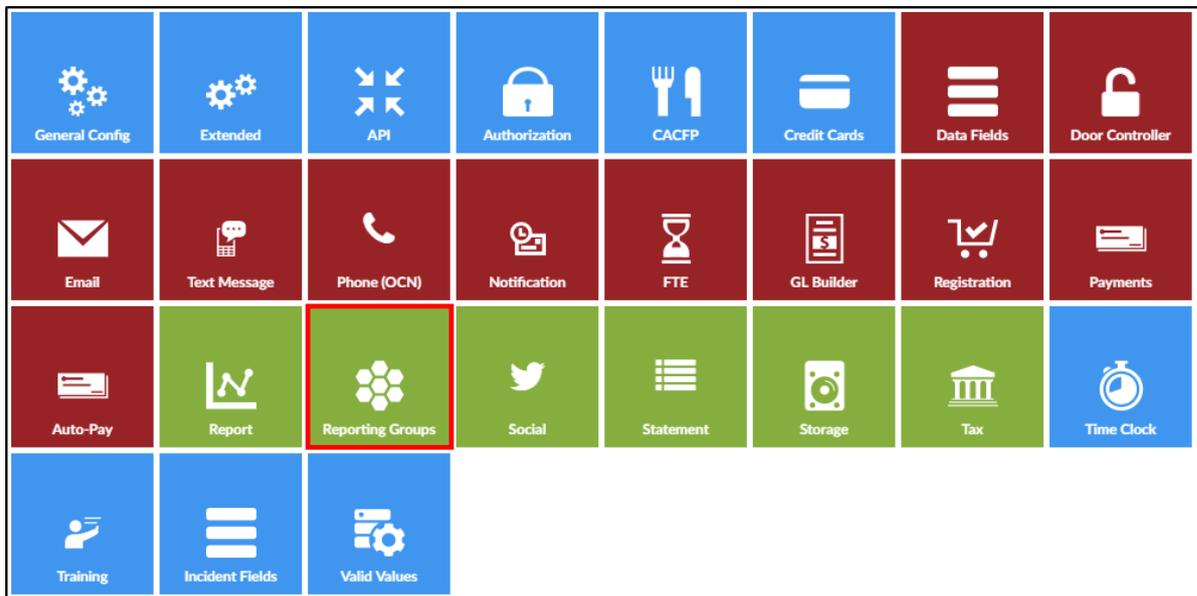
# System Config > Reporting Groups

Last Modified on 01/11/2019 8:02 am EST

Reporting Groups allows for site administrators and staff to group families together that need to be tracked for outstanding balances.

## Adding a New Reporting Category

1. Click Setup from the menu. Select System Config, then choose Reporting Groups

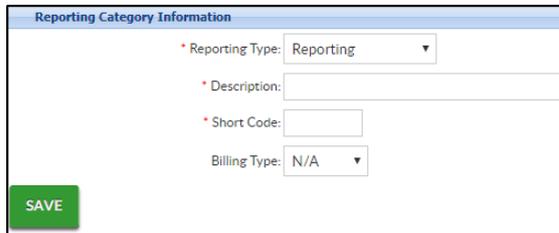


2. Reporting Type - select a reporting type from the drop-down list
  - Reporting - use this option if the group will associate families together for billing
  - Payment Reporting - this option is used for grouping families together based on payments
  - Student - use this option if the group is used to assign children
3. Description - enter the name of the reporting group
4. Short Code - enter the abbreviated name for the reporting category
5. Billing Type - if the reporting group is associated to a billing cycle, select from the drop-down list
  - Weekly - choose this option if the billing cycle is based on a weekly basis. Families associated with this reporting category will be billed

when transactional billing is process for weekly

- Monthly - use this if the billing cycle is based on a monthly basis. Families associated with this reporting category will be billed when the transactional billing is processed for monthly

## 6. Click Save



The screenshot shows a form titled "Reporting Category Information". It contains the following fields:

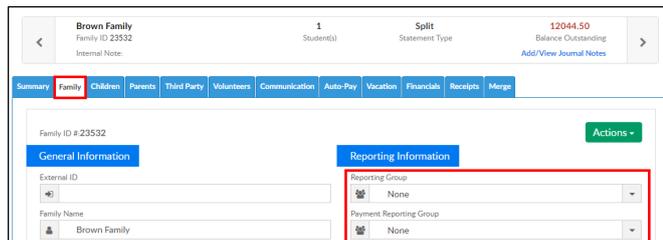
- Reporting Type: Reporting (dropdown menu)
- Description: (text input field)
- Short Code: (text input field)
- Billing Type: N/A (dropdown menu)

A green "SAVE" button is located at the bottom left of the form.

## Assigning a Reporting Group

### 1. To assign a reporting group, locate the family's record

- To assign a group to a Family, navigate to the family tab to assign payment or the reporting group options



The screenshot shows the "Brown Family" record page. The "Family" tab is selected and highlighted with a red box. The "Reporting Information" section is also highlighted with a red box and contains the following fields:

- Reporting Group: None (dropdown menu)
- Payment Reporting Group: None (dropdown menu)

- To assign a group to a Student, navigate to the Children tab
- Scroll to the bottom and locate the Student Reporting Group dropdown. **Please Note:** This option will not be there if there is no Student reporting group setup
- Choose the reporting group

### 2. Click Save

## Reporting Group Reports

The below reports can be used to view the "Reporting" type of Reporting Groups:

- Category/Program Trend Report (Reports > Program)
- Outstanding Balance (Reports > Payments or Payments>Outstanding -

may require additional search criteria in order to process report at business level)

- Batch and Report (Reports > Payment - shows all transaction information for the facility)
  - Meal Counts (Reports > Child)
  - Age Range (Reports > Child)
  - Parent Payment Reporting Group - Excel (Reports> Financial - generates a report for families with "Bankruptcy", "Collections", or "Good Standing" reporting group types)
  - Family Status Tracking - Excel (Reports > Room/Program - includes both Reporting Group and Payment Reporting Group in report)
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