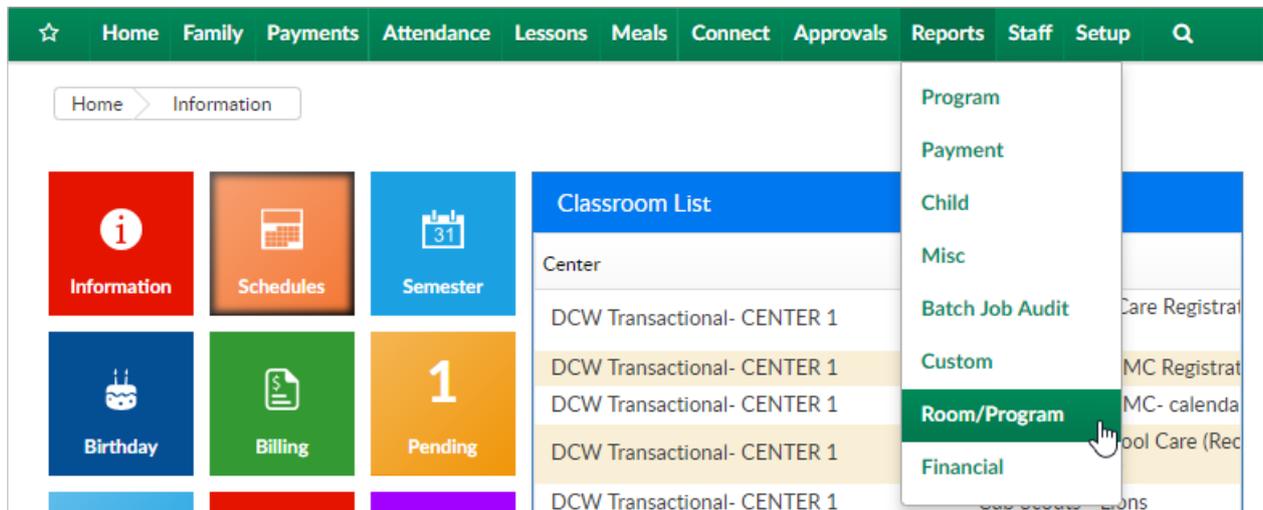


Financial- How to add a fee/adjustment to multiple families within a room

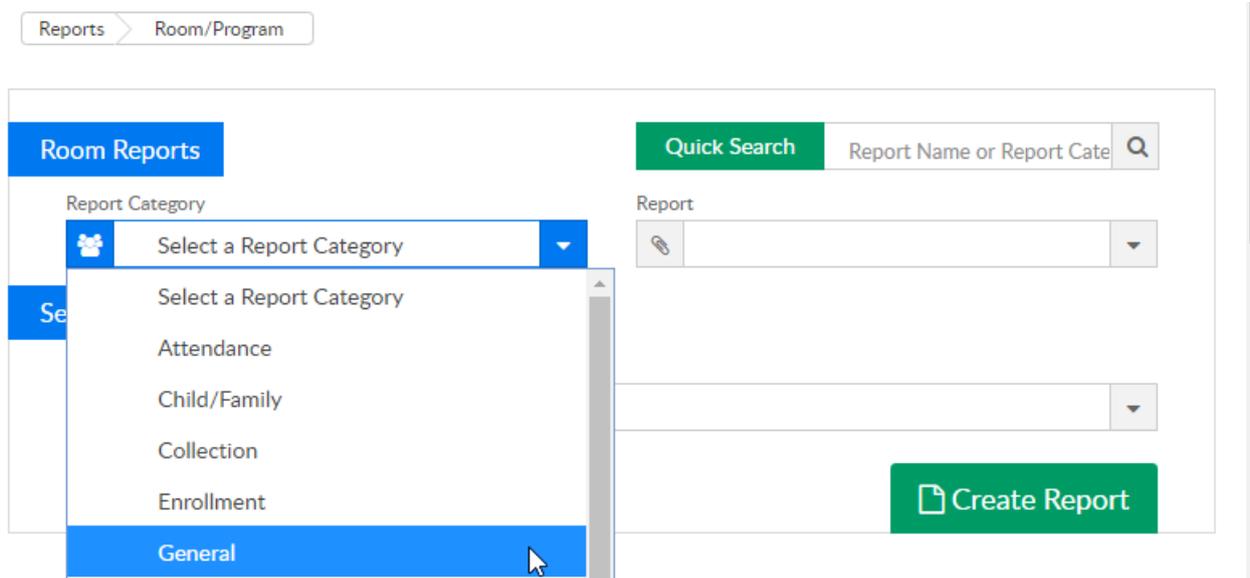
Last Modified on 12/07/2020 7:19 am EST

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.



Select General from the Report Category drop down menu



Then select Online

The screenshot shows the 'Room Reports' section with a 'Quick Search' bar for 'Report Name or Report Category'. Under 'Report Category', 'General' is selected. The 'Search Criteria' section includes a 'Center' dropdown with '--'. The 'Report' dropdown is open, showing options: 'Select a Report', 'Online' (highlighted by a mouse cursor), and '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 associated to the entered date

Then select Create Report

The screenshot shows the 'Room Reports' section with search criteria filled out: 'Report Category' is 'General', 'Report' is 'Online', 'Center' is '--', 'Semester' is '--', 'Category' is '--', 'Classroom' is 'DCW Transactional- CENTER 1 - AM, Before School Care', and 'From Date' is '02/19/2019'. A 'Create Report' button is highlighted at the bottom right.

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

Student View	Summary View	Ratio View	Schedule Staff Numbers	Actual Staff Numbers				
Student List - Feb 2019 - AM, Before School Care (Recurring Billing Room, Monthly)								
Student	Birthday	Mon	Tue	Wed	Thu	Fri	Guardians	Notes
<input type="checkbox"/>  Baggins, Frodo	10/12/2011	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Balbo & Berylla	
<input type="checkbox"/>  Giant, Clayton	08/08/2008	<input checked="" type="checkbox"/>	Debra Mignola & Johnny					
<input type="checkbox"/>  Giant, Jolly Green	10/01/2008	<input checked="" type="checkbox"/>	Debra Mignola & Johnny					

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

Classroom Change
Add Fee
Merge Documents

Change Classroom

Move to Classroom

🏠
--
▼

Date of Move

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

Classroom Change
Add Fee
Merge Documents

Adjustments

Adjustment Type

🏠
Activity Fee
▼

Amount

🏠
25

Date

🏠
02/19/2019

Note

🏠

Add

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

Note

Adjustment saved successfully.

OK

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

		dcw_kgass	02/19/2019	Clayton Giant - Activity Fee - DCW Transactional-CENTER 1 Note for Activity Fee	25.00	25.00	-696.10	
		dcw_kgass	02/19/2019	Jolly Green Giant - Activity Fee - DCW Transactional-CENTER 1 Note for Activity Fee	25.00	25.00	-671.10	
				Clayton Giant - Normal Fee - DCW Transactional-				

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