System Config > Valid Value, Adding Role Limits for Valid Values

Last Modified on 06/29/2020 12:33 pm EDT

Adding role limits to valid value type - fees and type - payments allow a center to control access to values based on assigned user role. For example- if a role has the allowed field set to no, users assigned to the role will not be able to see the option from the adjustments menu (they will not be able to select it).

1. Click Setup, then select System Config

S	earch			•									Business				
☆	Home	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	Q					
[Home I	Informati	on								Semes	ter					
											Classro	oom					
				alala	Cla	issroom	List				Classro	oom Summary					
	1						Center Classr			Classroo	or Rates						
	Information	mation Schedules		Schedules Semester DCV		V Transa	ctional- CE	NTER 1		*Flexible (Registra	Fees						
	# B		[≦]	2	DC	V Transa	ctional- CE	NTER 1		AM, Bef Room, N	Vacati	on	lling				
				Dending	DC	N Transa	ctional- CE	NTER 1		Cub Sco	Third I	Party					
	Birthday		Billing	Pending	DC	N Transa	ctional- CE	NTER 1		Flexible	Sched	ule					
									DC	V Transa	ctional- CE	NTER 1		Infants	Ruc		
	0	ions Chan	2		DC	N Transa	ctional- CE	NTER 1		PM Latc	Dus		atio				
	Registration		trations	Changes	New Family	DC	V Transa	ctional- CE	NTER 1		PM, Afte Room, N	Health	1	ng			
				DC	N Transa	ctional- CE	NTER 1		Prescho	Check	list						
							DC	V Transa	ctional- CE	NTER 1		xx-leg1	Daily S	Sheets			
	0 1		DCW Transactional- CENTER 2		Afternoc		_										
	Program	Program	ogram Live Deties	N Transa	ctional- CE	NTER 2		Infants	Admin								
	Waitlist Changes		Changes D		DC	DCW Transactional- CENTER 2 Infants I					Systen	n Config					

2. Select Valid Values



In the Valid Value List, scroll to the option to add role access/limits to; either Type - Fee<u>or</u> Type
Payment

Valid Value List							
Description	Short	GL Code	Offset GL				
🖃 Туре - Fee							•
Activity Fee	ACTF	4001	1200	\boxtimes	1	92	1
Bookkeeping Fee	BKFE	4002	1200	\boxtimes	1	92	
Center Registration Fee	CReg	4003	1200	\boxtimes	1	92	
Convenience Fee (non-refundable)	SERV	4004	1200	\boxtimes	1	93	
Late Fee	LFEE	4006	1200	\boxtimes	1	92	
Late Fee Adjustment	LPKU	4600	1200	\boxtimes	1	92	
Misc. Fee	MISC	4010		\boxtimes	1	92	
Normal Fee	NFEE	4000	1200	\boxtimes	1	92	
Payment Write Off	FWO	6100	1000	\boxtimes	1	92	
Prebill	PREB	4000		\boxtimes	1	92	
Re-Registration	RERE	4003	1200	\boxtimes	1	<u>83</u>	
Registration	REG	4003	1200	\boxtimes	1	92	
Security Deposit	SDEP	4004	1200	\boxtimes	1	<u>82</u>	
Summer Tuition	suTu	4005	1200	\boxtimes		92	-
🕅 🖣 Page 1 of 1 🕨 🕅					Display	ying 1 - 111 of	111

4. Locate the correct fee and click the role icon

Valid Value List							
Description	Short	GL Code	Offset GL				
🖃 Type - Fee							•
Activity Fee	ACTF	4001	1200	\boxtimes	1	82	
Bookkeeping Fee	BKFE	4002	1200	\boxtimes	-	92	
Center Registration Fee	CReg	4003	1200	\boxtimes	1	92	
Convenience Fee (non-refundable)	SERV	4004	1200	\boxtimes	1	92	
Late Fee	LFEE	4006	1200	\boxtimes	1	92	
Late Fee Adjustment	LPKU	4600	1200	\boxtimes	1	92	
Misc. Fee	MISC	4010		\boxtimes	1	92	
Normal Fee	NFEE	4000	1200	\boxtimes	1	92	
Payment Write Off	FWO	6100	1000	\boxtimes	1	92	
Prebill	PREB	4000		\boxtimes		92	
Re-Registration	RERE	4003	1200	\boxtimes	1	92	
Registration	REG	4003	1200	\boxtimes		92	
Security Deposit	SDEP	4004	1200	\boxtimes	-	92	
Summer Tuition	suTu	4005	1200	\boxtimes	1	82	+
🕅 🖣 Page 1 of 1 🕨 🕅 🧶					Displa	ying 1 - 111	of 111

5. Any existing setup will display in the Valid Value Role table

dd New Valid	Value Pole			
Valid Value				
Role	le	All		

6. To add or edit authorizations, complete the Valid Value Role ID section

Valid Value I	Role ID:	
* Role:		
User (Not Allowed)	•	
Min Amount:		
Max Amount:		
Max Sum Amount:		
Max Sum Days:		
Allowed:		
Yes 🔻		
SAVE		

- Role choose the role from the drop-down
- Role Type -
- Min Amount (optional)
- Max Amount (optional)
- Max Sum Amount (optional)
- Max Sum Days (optional)
- Allowed
 - Yes users with this role will see the valid value
 - No users with this role will not be able to see the valid value
- 7. Click Save
 - To edit, click the modify icon on the far left of the line
 - $\circ~$ To delete, click the red X on the far right of the line