## Financial- How to limit rates that display on the admin side when adding programs for children

Last Modified on 12/07/2020 7:20 am EST

To help streamline the process for admins when entering program/room assignments for children specific rate categories can be assigned to room categories or specific rates.

To setup rate categories:

Step 1: Setup rate category

Step 2: Add rate(s) to the rate category - create new rate or edit current rate

## Once rates have been setup go to Setup > Room

Sea	arch			•								🗒 Bus	iness Level - DCW - Trans	actional	0
☆	Home	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	۹			
	Home	Informatio	on								Semes	ster			
_											Classr	oom			
	<b>A</b>			uterta 1941	Cla	issroom	List				Classr	oom Summary			

## Select a room category name

p - Classioolli				
Search Panel				
Gemester:		~		
FILTER				
Actions -				
+ ) (6) *Summer P	rograms (4) Early Childhood (Category) (	5) School Year Care (Category) (4)	No Category (	54)
Center Level - (	Classrooms			
Center Level - ( Category	Classrooms Classroom Name		Operating Capacity	Fee
Center Level - ( Category Early Childhood (Cate 5 Programs - Show/H	Classrooms Classroom Name		Operating Capacity	Fee
Center Level - ( Category Early Childhood (Cate 5 Programs - Show/H Upload a Category Pl	Classrooms Classroom Name egorified		Operating Capacity	Fee
Center Level - ( Category Early Childhood (Cate 5 Programs - Show/H Upload a Category PI (Registration Setup) •	Classrooms Classroom Name egory Hidd		Operating Capacity	Fee
Center Level - ( Category Early Childhood (Cate 5 Programs - Show/H Upload a Category PI (Registration Setup) • (Registration Confirm	Classrooms Classroom Name egor() dide icture Cassion Decision		Operating Capacity	Fee

Then select View/Edit Rate Authorizations

New Classroom Category	
*Classroom Category:	Early Childhood (Category)
Student/Teacher Ratio:	1
GL Code:	
Show All On Attendance:	No 🗸
# Hours Max For Half Day FTE:	0
Default Revenue Type:	Default Revenue
Category Group:	~
Default Reporting Category:	~
Daily Sheet:	~
Allow Room Change Request:	Yes 🗸
Allow Portal Parent Managed Day Removal:	No 🗸
Show Only on Scheduling:	No 🗸
Require Room Start and End Time Entry on Admin Side:	No 🗸
Restricted Rates:	View/Edit Rate Authorizations

Select the New Authorizations button

								ltm ltm
ssrooms in the	e Early Childhood (Cate	gory) category have no restri	ictions on rates a	llowed.				0
Authorizat	ions List - Early C	hildhood (Category)						
Den in		2	<b>2</b> 1	Proved	Ph f f a	Pire in	2 mil	
Descript	lion	Company	State	Brand	Division	District	County	

Select Authorization criteria, then press Save

- Select either individual rate or rate category
- Select at least one Authorization criteria
  - Center
  - State pulls from the Home > General tab
  - Brand- pulls from the Home > General tab
  - Division- pulls from the Home > General tab
  - District- pulls from the Home > General tab

Classro	om Category				
Early	Childhood (Category	()			
			_	_	
Pleas	e select either an In	dividual R	ate or a Rate	e Category	
Individu	ual Rate				
\$					•
Rate Ca	ategory				
Autho	School Year Rates				•
Autho	School Year Rates				•
Autho Center	School Year Rates orization Criteria				•
Autho Center	School Year Rates				•
Autho Center	School Year Rates Orization Criteria MI Michigan	•			•
Autho Center State	School Year Rates Orization Criteria MI Michigan	•	Division		•
Autho Center State Pand	School Year Rates Drization Criteria MI Michigan	•	Division		•
Autho Center State Pand District	School Year Rates Orization Criteria MI Michigan	•	Division		•
Autho Center State Parand Parand District	School Year Rates orization Criteria MI Michigan	•	Division	-	•

## Example:

On the child tab from the admin side, select the Program/Room Assignment tab-

Summary Family	Children	Parents	Third Party	Volunteers	Communication	Auto-Pay	Vacation	Financials	Receipts	Merge	
Brown Age 6	anie										Add Sibling
Admission/Per	sonal	Doctor/H	ealth Pro	ogram/Room	Assignment	Calendar Viev	w Mo	re 🗸			
Discount					Setup Disco	vunt Spe	cial Classroo	om Note			

When a new program/room assignment is going to be added to the child, select the Room, Semester (if applicable), Date Range, Specific Days (optional), Expected Part of Day (optional) and Times the Child is expected (optional).

When the Rate drop down box is selected, only the authorized rates will display-

DCW Transactional- CENT	TER 1 - Infants								
emester									
1 2020: 2019-2020 Early Cl	hildhood							-	
chedule Effective Date				Schedule	e End Date				
m 08/01/2019			m	m 05/29/2020					
lays									
		Scheduled	Attendance		Expect	ed Arrival	Expected Departure		
Apply to All Days				-					
Monday				-					
Tuesday				-					
Wednesday				-					
Thursday				•					
Friday				-					
ate								Expand Rates	
ា								•	
Description	1-Day Fee	2-Day Fee	3-Day Fee	4-Day Fee	5-Day Fee	Rate Type			
Reoccuring Billing Monthly - PM	250.00	250.00	250.00	250.00	250.00	Flat		•	
Reoccuring Billing Monthly - AM	100.00	100.00	100.00	100.00	100.00	Flat			