

Special Settings - Problem Accounts (Families)

Last Modified on 06/05/2019 8:48 pm EDT

When necessary, it is possible to 'flag' a family / account as a Problem Account.

To flag a family as a problem account, set **Problem Account = Yes** on the *Family Summary* tab. **Save Changes**. *Problem Account* is now highlighted in red. If any notes are added to the *Notes* area of the *Misc* tab, the *Misc* tab will also be highlighted in red.

Family: Clements

← RETURN **SAVE CHANGES** **DELETE**

Make Sale/Post Fees Payment Refund Statement Add Student Add Contact Archive Family Family Name Email Push Notification Email Schedules Merge Family

Summary **Contacts** Classes Events Transactions Billing Info **Misc**

Primary Contacts

View 1 - 1 of 1 Print Refresh

Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
Alane Clements	Mother	(704) 555-0100		(704) 555-7777	aclements@email.com	Yes	Yes	aclements@email.com	

Students

View 1 - 1 of 1 Print Refresh

First Name	Last Name	Active	Gender	Birth Date	Age	Grade	Fixed Fee	Enrolled Classes	F. Enroll	Wait
Jennifer	Clements	Enroll	Y	Female	2/17/2002	17 yrs		Jazz III Wed 7pm(Dianne H.)(70), Tap II Tues 7pm(Dianne H.)(70)	0	

Current Balance **145.00** **Problem Account ?**

Location: EDU Status: Active Registration Date: 2/17/2017 Home or Primary Phone: (704) 555-0100

Note: The Misc tab will change to red if either a note is added to the Notes section on the Misc tab or if Problem Account is set to Yes.

To identify Problem Account families, go to *Families (menu) > All Families* and filter for *Financial Details > Problems Accounts > Is Problem Account?*