

# The Family Record

The Family record provides a central location for storing and accessing all family information. Each Family record includes tabs to organize information, action buttons for specific tasks, links to related records or actions, and **User-defined fields** for customization.

The quickest way to access a family's record is by using the **Global Search** field above the main menu. Enter a name, email address, or phone number to locate the Family record. You can also easily navigate to a family's record from the **All Families** or **All Students** pages.

**Family: Ager**

Buttons are used to perform actions related to the family.

← RETURN   SAVE CHANGES   DELETE

Make Sale/Post Fees   Payment/Credit   Refund   Statement   Add Student   Add Contact   Archive Family   Family Name   Email   Email Schedules   Submit Absences   Merge Family

Summary   **Contacts**   Classes   Events   Appointments   Transactions   Billing Info   Misc   Notes (0)   Resources (0)   Policies (1)

**Primary Contacts**

View 1 - 1 of 1   Print   Refresh

Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
Holly Ager	Mother	(704) 555-1200		(704) 555-1200	hollyager41@gmail.com	Yes	Yes	hollyager41@gmail.com	10/1/2024 3:24:00 PM

**Students**

View 1 - 4 of 4   Print   Refresh

First Name	Last Name	Active	Gender	Birth Date	Age	Grade	Fixed Fee	Enrolled Classes	Wait
Barbie	Ager	<span style="background-color: #28a745; color: white; padding: 2px;">Enroll</span>	Y	Female	11/17/2010	13 yrs		Ballet - T - 6pm(Livy W.)(75), Acro - T - 5pm(John L.)(75)	
Danielle	Ager	<span style="background-color: #28a745; color: white; padding: 2px;">Enroll</span>	Y	Non-Binary	4/29/2008	16 yrs	200.00	Ballet Jr Comp - T - 7pm(Dianne H.)(115), HipHop Jr Comp - W - 7pm(John L.)(115)	
David	Ager	<span style="background-color: #28a745; color: white; padding: 2px;">Enroll</span>	Y	Male	5/15/2007	17 yrs		Tumbling Int - Th - 7pm(Livy W.)(85), Ballet Jr Comp - T - 7pm(Dianne H.)(115), Jazz Jr Comp - T - 4pm(Dianne H.)(115), Acro - T - 5pm(John L.)(75)	
Lisa	Ager	<span style="background-color: #28a745; color: white; padding: 2px;">Enroll</span>	Y	Female	1/30/2014	10 yrs	100.00	Cheer Basics - M/W/F - 7pm(Livy W.)(75), Acro - T - 5pm(John L.)(75)	

Current Balance 4302.62    Problem Account

Location: Main   Status: Active

Registration Date: 12/14/2022

Primary Phone: (704) 555-1200

Address 1: 2016 Hummingbird Crescent

Address 2: \_\_\_\_\_

City: Huntersville   State: NC   Zip: 28078

Neighborhood: \_\_\_\_\_

Account#: \_\_\_\_\_

Family ID: 21729166

The family's information is organized on various tabs. The Summary tab is selected here.

The Family record contains multiple links for accessing related records or performing specific actions for the family and its students.



The *Current Balance* displayed on the Summary tab is pulled from the Transactions tab. **Ablack** balance means a zero balance, a **red** balance indicates an amount owed to you, and a **green** balance indicates a credit. This color code feature is applied on the Transactions tab as well.

Expand/Collapse All

Family Tab Descriptions

Family Button Descriptions

## ▮ Frequently Asked Questions

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