

Special Settings - Problem Accounts (Families)

There may be instances where you find it necessary to 'flag' a family/account as a **Problem Account**. A family flagged as a Problem Account can still log in to their Parent Portal to make payments and review their account.

Flag a Problem Account

1. Locate the *Family* record.
 - o Go to the **Families** (menu) > **All Families** to locate the family.
 - o Use the global search at the top of each page to locate the family.
2. Click the **Summary** tab.
3. Select the checkbox for **Problem Account**.
4. Click **Save Changes**.

Family: Owers

← 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 Transactions Billing Info **Misc** Notes (0) Resources (0)

View 1 - 1 of 1 Print Refresh

Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
David Owers	Father	(704) 555-7721		(704) 555-7721	dowers@email.com	Yes	Yes	dowers@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
Ashlee	Owers	Enroll	Y	Female	10/22/2007	13 yrs, 4 mths		Tumbling L2 - Mon 6pm(Stephanie A.)(67.50)	0	

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

Location: SUP Status: Active Registration Date: 8/23/2019 Home or Primary Phone: (704) 555-7721

When a family account is marked as a *Problem Account* the *Misc* tab turns red.

When a family account is marked as a *Problem Account* it will display as red on the *Summary* tab.

Locate Problem Accounts

To identify Problem Account families, go to the *Families (menu) > All Families* and filter for *Financial Details > Problem Accounts > Is Problem Account?* In addition, any family marked as a problem account will be displayed in **red** in the *All Families* grid or in the list of families located using *Global Search Results*.

Prevent Problem Families from Enrolling

When a family is flagged as a Problem Account, it is possible to prevent them from enrolling in classes and events via the Parent Portal.

Go to the **Gear** icon > **Settings** > **Parent Portal** > **Settings**(tab) > **Class Enrollment Settings** > **Prevent Problem Families from enrolling in Classes and Events** and select the checkbox. **Save Changes**. The

family will continue to have access to the Parent Portal but won't be able to enroll. Parents will see this message, *"There is a problem with your account and you cannot enroll at this time, please contact us directly."*



To deny their access to the Parent Portal, open their Contact record, and deselect the **Allow to Login to Parent Portal** field in the Portal Information area.
