### **Add Or Manage A Family**

Add or Manage a Family from the Families Information Page



Written By Venu Yarra

Updated 2 years ago

Families Info Page is the place where you can manage all the Families & their students’ information in a single location. The system maintains the consolidated information of the Students & their Contacts of a Family under a Family Name.

Click on the Families menu and Families Info sub-menu to navigate to the Families info page.

Any Class or Event enrollments made from the enrollment pages will add the Families & Students in the grid.

You have the ability to directly add a Family here. Any Staff except Parent and Student can add & remove a Family.

The Franchise is selected by default for the Franchise Accounts. Business Account users have the ability to filter the Families list with one or more Franchises.

Click on the “Add Family” button to add a new Family or Student.

In the Overview tab, you have the ability to add Family Information, add one or more Students of a Family, add one or more Contacts of a Family.

Setting a Family to In-Active will set the Family’s Students & Contacts to In-Active and Move them to the Leads file.

You have the ability to set each Student to In-Active Status in their corresponding sections. Setting just a Student to In-Active will move only the Student to the Leads file.

You have the ability to add more than 1 Student or Contact within a Family.

You can send Portal access to the Student or Contact by clicking on Action and “Send Portal Access” option. If the portal access is already created then you will not see this option.

The rest of the tabs in the popup will be enabled once you create a Family.

All the information of a Family is managed in this popup across these tabs.

The information can be viewed, added or edited by different roles based on the permissions. Example - Contacts and Students can’t set a Family to Active or In-Active.

### **Family's Student Skillset**

Set or view Skillset of a Family's Student



Written By Venu Yarra

Updated 2 years ago

The system provides the ability to set the Skillset like Badges, Certificates, Ratings for a Student.

Click on the Families menu and Families Info sub-menu to navigate to the Families' info page.

Double-click on the row of a Family you want to set the skill set of a Student.

Clicking on the Skills tab shows the information of the students’ skills. All the Student enrolled courses are displayed in the corresponding Student’s sections.

For each course, you can view the Level, Badge achieved and Certificate achieved.

You also have the ability to provide a rating for each course and each level.

In order to set a Level status, click on Actions, and Level status. In the popup, select an option in the Status dropdown list for the corresponding Level. The Badge is assigned to the Student for the Level when a Level status is set to Completed. The system sends an email to the Contacts & Students of the Family when a Level is completed based on the Email settings.

In order to set a Course status, click on Actions and Course status. In the popup, select an option in the Status dropdown list. The course certificate is assigned to the Student for a Course when a Course status is set to Completed. The system sends an email to the Contacts & Students of the Family when a Course is completed based on the Email settings.

You have the ability to upload a Certificate of your choice instead of using the System generated certificate. In order to set the custom certificate, click on Actions, and Upload Certificate. In the popup, click on the “Upload Certificate” button to upload the certificate for the selected Course.

You can also set the Skillset for a Student in Student Info Page under the Students menu.

The information can be viewed, added, or edited by different roles based on the permissions. Example - Contacts and Students can’t set the Skillset but can view the information.

### **Classes For A Family's Students**

Add Students of a Family to a Classes, Transfer or Drop from the Classes



Written By Venu Yarra

Updated 2 years ago

The system provides the ability to add a Student to a Class within the portal apart from the regular enrollment process.

Click on the Families menu and Families Info sub-menu to navigate to the Families' info page.

Double-click on the row of a Family you want to add a Student to the Class.

Clicking on the Classes tab shows the information of Classes that are added to the Family’s Students. Each Student of a Family is displayed in each section with their assigned classes. Click on the “Add to a Class” button to add a Student to a Class.

In the popup, hover & click the “Add to the Class” button of a Course & Level you want the Student to be added. After you are done with adding the Student to all the Classes, click on the Close button to close the popup and view the Classes added to the Student. In the Student’s grid, you will see the Class that you added.

In order to Drop Off the Student from a Class, click on the Drop Off option after clicking on the Actions button for the corresponding Class.

You can Drop Off the Student immediately or in the future date by selecting the required option in the popup. Clicking the “Yes” button will open a popup to confirm if you want the existing pending Challenges to be removed or keep them. Clicking on “Yes” will remove and drop off the Student from the Class. Clicking on “No” will keep the pending Challenges and drop off the Student from the Class.

In order to Transfer the Student from a Class to another Class, click on the Transfer option after clicking on the Actions button for the corresponding Class.

A list of currently enrolled classes will be displayed in the popup. Select the class from which you want the Student to be removed and click on the Continue button. Click on the Transfer button of the class to which you want the Student to be transferred to. Clicking the “Yes” button will open a popup to confirm if you want the existing pending Challenges to be removed or keep them. Clicking on “Yes” will remove and drop off the Student from the Class. Clicking on “No” will keep the pending Challenges and Transfer the Student to the Class.

You can also add the Student to a Class in Student Info Page under the Students menu.

The information can be viewed, added, or edited by different roles based on the permissions. Example - Contacts and Students can’t Drop or Transfer from a Class.

### **Medical Information For Family's Students**

Manage Medical information of the Students of a Family



Written By Venu Yarra

Updated 2 years ago

The system provides the ability to add & manage the Medical information of the Family’s Students.

Click on the Families menu and Families Info sub-menu to navigate to the Families' info page.

Double-click on the row of a Family you want to manage Medical Information for a Student.

Clicking on the Medical tab shows the Medical information of Family’s students. Each Student of a Family is displayed in each section with their Medical information.

### **Attendance For A Family's Student**

Add, view or manage Attendance of a Family's Student



Written By Venu Yarra

Updated 2 years ago

The system provides the ability to view & manage the Attendance of the Family’s Students.

Click on the Families menu and Families Info sub-menu to navigate to the Families' info page.

Double-click on the row of a Family you want to manage Attendance for a Family.

Clicking on the Attendance tab shows the list of Classes that are assigned to the Family’s Students. Each Student of a Family is displayed in each section with their assigned classes. For each Class, you have the ability “View Attendance” and “Take Attendance” for the Student.

Clicking on the “View Attendance” button will display the list of all the Attendance marked.

Clicking on the “Take Attendance” button will display the list of all the timings of the Class for the next 1 month.

You can filter the dates to filter the list. Clicking the “Attendance” button for the timing will give you the option to Submit Attendance for the Student for the corresponding timing

.

Clicking on the “Cancel Class” button for the timing will Cancel the Class. You can click on the Undo button to undo the class cancellation.

You have an option to add a Make-up/Unscheduled class by clicking on the “Add Make-up/Unscheduled class”. In the popup, provide the class details and click on Create to add the Make-up class.

You can also view & manage Attendance in multiple places like Attendance page under Families menu or Attendance page under the Students menu or in the Student popup of Students Info Page under the Student menu.

The information can be viewed, added or edited by different roles based on the permissions. Example - Contacts and Students can’t mark the attendance but can view it.

### **Feedback Of Family's Students**

Ability to provide feedback to Family's Students and get feedback from Family's Contacts & Students



Written By Venu Yarra

Updated 2 years ago

The system provides the ability to view & manage the Feedback of the Family’s Students.

Click on the Families menu and Families Info sub-menu to navigate to the Families' info page.

Double-click on the row of a Family you want to manage Feedback for a Family.

Clicking on the Feedback tab shows the list of Courses & Levels that are assigned to the Family’s Students. Each Student of a Family is displayed in each section with their Classes. For each of them, the staff can add the feedback of the Student for the corresponding class by clicking on the “Add Feedback” button in the “Feedback from Center” column.

Contacts or Students can also provide their feedback regarding the Class or Staff by clicking on the “Add Feedback” button in the “Feedback by Contact/Student” column. Note that the Staff can’t see the “Add Feedback” button in the Feedback by Contact/Student column and Contacts or Students can’t see the “Add Feedback” button in the Feedback by Contact/Student column.

### **Payments Of Family's Students**

Manage Payments and Fees of the Family's Students



Written By Venu Yarra

Updated 2 years ago

The system provides the ability to view & manage the Payments of the Family’s Students.

Click on the Families menu and Families Info sub-menu to navigate to the Families' info page.

Double-click on the row of a Family you want to manage Payments for a Family.

Clicking on the Payments tab shows the list of Enrollment Payments and Fee Payments in 2 separate sections.

Note that only the Payments that are unpaid and scheduled payments will be listed here. Any Paid payments will be listed in the Transaction tab.

The Payments for each Student of a Family are displayed in separate rows in the grid for the corresponding enrolled Classes.

In Enrollment Payments, the Original Amount represents the Price of the Class.

Discount Amount represents any Discount that is applied to the Class or any General Discount.

Class Fee Amount represents the Class-specific Fees like registration Fee. Total Amount represents the amount that is calculated from the Original Amount plus (+) Class Fee minus (-) Discount Amount.

If the Payment is set to Auto Deduct then it is represented as Yes for the auto deduct.

The Next Scheduled Data & Time information provides information about the next scheduled date on when the payment will be deducted.

The status column represents the status of the Payment

.

Pay Method represents the method by which the scheduled Payment will be deducted.

In the Fee Payments, the Student Fee represents the Fee Name that is assigned to the Student.

Note that the Student Fee is not associated with any class enrollment. You can leverage the Student Fees feature when it is a multiple class/course scenario or if it is a Fee for a specific duration.

Original Amount represents the Fee Amount.

Discount Amount represents any Discount that is applied on the Fee.

Total Amount represents the amount that is calculated from the Original Amount minus (-) Discount Amount.

If the Payment is set to Auto Deduct then it is represented as Yes for the auto deduct.

The Next Scheduled Data & Time information provides information about the next scheduled date on when the payment will be deducted.

Status column represents the status of the Payment.

Pay Method represents the method by which the scheduled Payment will be deducted.

Based on the Permissions, certain Staff roles can Add, Manage, and Assign Fee to the Students.

Clicking on Manage Fees will open a popup to Add and Manage Fees.

Clicking on the “Add Fees” button will open a popup to create a new Fee.

The added fees will be displayed in the grid and you have the ability to view, edit & delete the Fees that are added for the Franchise or the Business.

Based on the Permissions, certain Staff roles can perform actions for both Enrollment Payments and Fee payments.

Based on the payment status, you will see the following list of Actions when you click on the Action buttons -

Pay - To Pay by the staff with information from the Contact or Student or

To send an Invoice to collect the payment

To mark the payment as Paid when paid by Check

Collect Payments - To collect any Ad Hoc Payments

Recurring payments - To manage recurring payments

Set/Change Recurring Date - To set or change the recurring date of a payment that is set to recurring.

Add/Update Coupon - To add or update a coupon for a payment

Hold Payment - To hold a recurring payment

Cancel Payment - To cancel a recurring payment

### **Transactions Of A Family's Students**

View or Manage Transactions of a Family's Students



Written By Venu Yarra

Updated 2 years ago

?The system provides the ability to view and manage the Transactions of the Family’s Students.

Click on the Families menu and Families Info sub-menu to navigate to the Families' info page.

Double-click on the row of a Family you want to manage Transactions for a Family.

Clicking on the Transactions tab shows the list of Transactions that have been performed for the Family’s students. All the paid payments will appear in this tab as Transactions.

If a single enrollment happens for multiple students for one or more classes then it is combined into a single transaction. If that enrollment has recurring payments then it is splitted into multiple payments which would be 1 payment per student for each recurring cycle.

In the grid, the Original Amount represents the Price of the Class.

Discount Amount represents any Discount that is applied to the Class or any General Discount.

Class Fee Amount represents the Class-specific Fees like registration Fee.

Total Amount represents the amount that is calculated from the Original Amount plus (+) Class Fee minus (-) Discount Amount.

If the Payment is set to Auto Deduct then it is represented as Yes for the auto deduct.

Amount Paid represents the Amount that has been paid.

Amount Refund represents the Amount that has been refunded.

Balance represents the balance amount that needs to be paid.

Paid Data & Time information provides information on when the payment has been made.

Pay Method represents the method by which the payment has been made.

Transaction key represents the key by which the Transaction has been tracked.

Receipt provides the link to the Receipt of the payment made.

Based on the Permissions, certain Staff roles can Refund the amount for any transaction. Note that the Refund can’t be provided more than the amount paid for the transaction.

### **Transactions Of A Family's Students**

View or Manage Transactions of a Family's Students



Written By Venu Yarra

Updated 2 years ago

?The system provides the ability to view and manage the Transactions of the Family’s Students.

Click on the Families menu and Families Info sub-menu to navigate to the Families' info page.

Double-click on the row of a Family you want to manage Transactions for a Family.

Clicking on the Transactions tab shows the list of Transactions that have been performed for the Family’s students. All the paid payments will appear in this tab as Transactions.

If a single enrollment happens for multiple students for one or more classes then it is combined into a single transaction. If that enrollment has recurring payments then it is splitted into multiple payments which would be 1 payment per student for each recurring cycle.

In the grid, the Original Amount represents the Price of the Class.

Discount Amount represents any Discount that is applied to the Class or any General Discount.

Class Fee Amount represents the Class-specific Fees like registration Fee.

Total Amount represents the amount that is calculated from the Original Amount plus (+) Class Fee minus (-) Discount Amount.

If the Payment is set to Auto Deduct then it is represented as Yes for the auto deduct.

Amount Paid represents the Amount that has been paid.

Amount Refund represents the Amount that has been refunded.

Balance represents the balance amount that needs to be paid.

Paid Data & Time information provides information on when the payment has been made.

Pay Method represents the method by which the payment has been made.

Transaction key represents the key by which the Transaction has been tracked.

Receipt provides the link to the Receipt of the payment made.

Based on the Permissions, certain Staff roles can Refund the amount for any transaction. Note that the Refund can’t be provided more than the amount paid for the transaction.

[Next](https://help-lcm.calimatic.com/article?categoryId=7&solutionId=86)

### **Activity Of A Family's Students**

View the Activity of a Family's Students like enrolling, transfer, drop-off, etc



Written By Venu Yarra

Updated 2 years ago

The system provides the ability to view the Activity of the Family’s Students information.

Click on the Families menu and Families Info sub-menu to navigate to the Families' info page.

Double-click on the row of a Family you want to view the Activity for a Family.

Clicking on the Activity tab shows the list of Activities for the Family’s Students. Each Student of a Family is displayed in each section with their Activity details like Level Achieved, Course Completed, Student Added to a Class, etc. You have the ability to search for any activities.

### **Email A Family's Contacts And Students**

Ability to Email a Family's Contacts and Students



Written By Venu Yarra

Updated 2 years ago

The system provides the ability to send an email to the Family’s Contacts.

Click on the Families menu and Families Info sub-menu to navigate to the Families' info page.

Double-click on the row of a Family you want to email.

Based on the permissions, you will see an Email icon in the top bar.

Clicking on it will display a popup with the list of contacts of a Family selected in the “Send Email to” field.

In the Email Template field, you will have the ability to select an Email Template that is already designed.

You have the ability to insert System values into the Email message by clicking on the Insert System Values link and selecting the variables.

After you enter the Subject and Message and click on Send, then the email will be sent to the people selected in the “Send email to” field.

### **Families Transactions**

View or manage one or more Families Transactions



Written By Venu Yarra

Updated 2 years ago

The system provides the ability to view and manage the Transactions of the Family’s Students.

Click on the Families menu and Transactions sub-menu to navigate to the Families' Transactions page.

Double-click on the row of a Family you want to manage Transactions for a Family.

Clicking on the Transactions tab shows the list of Transactions that have been performed for the Family’s students. All the paid payments will appear in this tab as Transactions.

If a single enrollment happens for multiple students for one or more classes then it is combined into a single transaction. If that enrollment has recurring payments then it is split into multiple payments which would be 1 payment per student for each recurring cycle.

In the grid, the Original Amount represents the Price of the Class.

Discount Amount represents any Discount that is applied to the Class or any General Discount.

Class Fee Amount represents the Class-specific Fees like registration Fee.

Total Amount represents the amount that is calculated from the Original Amount plus (+) Class Fee minus (-) Discount Amount.

If the Payment is set to Auto Deduct then it is represented as Yes for the auto deduct.

Amount Paid represents the Amount that has been paid.

Amount Refund represents the Amount that has been refunded.

Balance represents the balance amount that needs to be paid.

Paid Data & Time information provides information on when the payment has been made.

Pay Method represents the method by which the payment has been made.

Transaction key represents the key by which the Transaction has been tracked.

Receipt provides the link to the Receipt of the payment made.

Based on the Permissions, certain Staff roles can Refund the amount for any transaction. Note that the Refund can’t be provided more than the amount paid for the transaction.