

# Problem Accounts (Families)

Last Modified on 03/10/2021 11:02 am EST

There may be instances where you find it necessary to 'flag' a family/account as a *Problem Account*.

## Flag a Problem Account

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

The screenshot shows the 'Family: Owers' page. At the top, there are buttons for 'RETURN', 'SAVE CHANGES', and 'DELETE'. Below these are tabs for 'Summary', 'Contacts', 'Classes', 'Events', 'Transactions', 'Billing Info', 'Misc', 'Notes (0)', and 'Resources (0)'. The 'Misc' tab is highlighted in red. A callout box points to the 'Misc' tab with the text: 'When a family account is marked as a Problem Account the Misc tab turns red.'

Below the tabs, there are sections for 'Primary Contacts' and 'Students'. The 'Primary Contacts' section shows a table with columns: Contacts, Type, Home Phone, Work Phone, Cell Phone, Email, Bill, Login, Portal UserID, and Last Login. The 'Students' section shows a table with columns: First Name, Last Name, Active, Gender, Birth Date, Age, Grade, Fixed Fee, Enrolled Classes, F. Enroll, and Wait.

At the bottom, there is a 'Current Balance' of 145.00 and a checkbox labeled 'Problem Account' which is checked. A callout box points to this checkbox with the text: '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

If you want to stop problem families from enrolling in classes via the Parent Portal. Go to the *Tools (menu) > Parent Portal > Settings (tab) > Class Enrollment Settings > Prevent Problem Families from enrolling* and add a checkmark. Don't forget to **Save Changes**.