

Mass Drop All Classes for a Family/Student

Last Modified on 12/09/2020 10:14 am EST



Permissions control the ability for your Users to see certain data and take specific actions. Before moving forward review [User Permissions for Mass Drop All Classes](#).

Mass Drop Classes functionality allows you to drop all classes for students in a family (*family* record) or for a single student (*Student* record) when the drop date, drop reason, and drop notes are the same.

- ★ Drop all classes for an individual student and/or all the students in the same family at one time.
- ★ Remove waitlisted classes and future enrolled classes in the same workflow.
- ★ After classes are dropped all reports and class details are automatically updated.

Drop All Classes for a Family

1. Go to **Families > List Active Families > Select a family > Classes** (tab). Or use the global search above the menu bar.

Family: Barnhardt

← RETURN SAVE CHANGES DELETE

Make Sale/Post Fees

Payment

Refund

Statement

Add Student

Add Contact

Archive Family

Family Name

Em

Classes

View Past Enrollment History

Mass Drop Classes

Click to drop classes for all students in the family.

Current Enrollment

View 1 - 10 of 10

Print

Refresh

- Click the **Mass Drop Classes** button.
 - If there is a family balance on the account an orange warning message displays.
 - Click the account balance link to open *Search Transactions* and view an itemized list of outstanding unpaid transactions. Review outstanding fees and determine if action needs to be taken.
- Select the criteria in the pop-up window:

<p>Drop classes</p> <p>Family: Barnhardt</p> <div style="background-color: orange; padding: 5px; border: 1px solid black;"> <p>! This family has a balance of \$768.69</p> </div> <p>Which classes are we dropping?</p> <p><input checked="" type="checkbox"/> All current classes</p> <p><input checked="" type="checkbox"/> All future enrollments</p> <p><input checked="" type="checkbox"/> All waitlisted classes</p> <p><i>Current Class Drop Details:</i></p> <p>Drop date * ?</p> <p>05/10/2020</p> <p>Have these classes been completed? * ?</p> <p><input checked="" type="radio"/> NO (counted as a Drop - appears on Drop History)</p> <p><input type="radio"/> YES (not counted as a Drop)</p> <p>Reason *</p> <p>Family Moved</p> <p>Email primary instructor(s)?</p> <p><input checked="" type="checkbox"/> Yes</p> <p>Notes</p> <p>The Barnhardt family is moving in May. All the students should be removed from their classes.</p> <p style="text-align: right;">CANCEL DROP</p>	<p>Which classes are we dropping?- These options will show only when there are multiple classes to drop.</p> <ul style="list-style-type: none"> All current classes All future enrollments All waitlisted classes <p>Drop date* - Select the day after the last day the student(s) will attend class.</p> <p>Have these classes been completed?* - Select NO or YES.</p> <p>Reason* - Select the reason the class needs to be dropped from the drop-down list.</p> <p>Email primary instructor(s)? - When set to Yes an email will be sent to the instructor.</p> <p>Notes - Add any applicable notes.</p>
--	---

* Indicates required

- Click **DROP**. Dropped classes for the family move down to the *Past 10 Enrollments* section. When there are fixed fees associated with a family a new window will open. See [Update Family Fixed Fees](#) below.

Drop All Classes for a Student

Go to *Students > List Active Students > Select a student* and click the *Mass Drop Classes* button. Follow the same process as above to drop all classes for the student you selected.

Student: Max Barnhardt

[← RETURN](#)
[SAVE CHANGES](#)
[DELETE](#)

[Enroll](#)
[Email Schedules](#)
[Info Sheet](#)
[Absence/Attendance](#)
[Mass Drop Classes](#)

Family: [Barnhardt](#) First Name Middle Initial Last Name

Classes

View 1 - 2 of 2 [Print](#) [Refresh](#)

Class	Drop Date	Drop Reason	Drop Status	Drop Fee	Drop Fee Paid	Drop Fee Balance

Click to drop all classes for this student.

Cancel or Edit Future Drop Requests

When a Mass Drop has been scheduled for a future date, you can *Cancel* or *Edit* the information from either the *Family* record or the *Student* record.

- Click *Cancel* and the future drop class request will be removed and the class remains active.
- Click *Edit* to modify the *Drop from Class* request. Change the *Drop Date*, *Drop Reason*, or update *Notes*. The future drop date remains unless you cancel the request. If there are fixed fees on the account, you will be prompted to *Update Fixed Fee*.

Family: Uphill

[← RETURN](#)
[SAVE CHANGES](#)
[DELETE](#)

[Make Sale/Post Fees](#)
[Payment](#)
[Refund](#)
[Statement](#)
[Add Student](#)
[Add Contact](#)
[Archive Family](#)
[Family Name](#)
[Email](#)
[Email Schedules](#)
[Merge Family](#)

[Summary](#)
[Contacts](#)
[Classes](#)
[Events](#)
[Transactions](#)
[Billing Info](#)
[Misc](#)
[Notes \(0\)](#)
[Resources](#)

[View Past Enrollment History](#)
[Mass Drop Classes](#)

Current Enrollment

View 1 - 4 of 4 [Print](#) [Refresh](#)

Student	Class	Session	Enroll Date	Type	Days	Room	Time	Duration	Instructor	Fee	By	Future Drop	
Jack Uphill	Tap L1 - Mon 6pm	Spring 2020	5/7/2020	Enrolled	M	Studio B	6:00pm - 6:30pm	:30	Ms. Dianne	45.00	CB	5/21/2020	Cancel Edit
Jack Uphill	Youth Ninja Parkour	Spring 2020	5/7/2020	Enrolled	M	Floor B	7:00pm - 8:00pm	1:00	Coach John	85.00	CB	5/21/2020	Cancel Edit
Jill Uphill	Youth Ninja Parkour	Spring 2020	5/7/2020	Enrolled	M	Floor B	7:00pm - 8:00pm	1:00	Coach John	85.00	CB	5/21/2020	Cancel Edit
Jill Uphill	Ballet L1 - Mon 5pm	Spring 2020	5/7/2020	Enrolled	M	Studio B	5:00pm - 5:30pm	:30	Ms. Dianne	45.00	CB	5/21/2020	Cancel Edit
Total:								3:00					

Click on *Cancel* or *Edit* to modify the *Future Drop* request.

Update Family or Student Fixed Fees

If there are fixed fees on the account, a window will open once all classes have been dropped or scheduled.

Note: Set *Tools > Edit Settings > Organization Defaults > Class Settings > Prompt to Update Fixed Fee with Enrollment Changes* to YES. Otherwise, the *Fixed Fee* window will not open after classes are dropped.

There are two options for **Family Fixed Fees**:


- Remove any fixed fee from the selected family- enable this option and the fixed fee is removed from

the account.

- *Retain the fixed fee for the record*- keep the fixed fee as shown or change the amount as needed. The family fixed fee can be posted when you **Post Tuition Fees** to the family's account. **Note:** If there is a student fixed fee on the account, a pop-up window will open and prompts you to either leave the student fixed fee in place or remove the student fixed fee.

Update family fixed fee

(optional) You may update this fixed fee.

 The family fixed fee will post when using Post Tuition Fees.

AMOUNT

100.00

EXPIRES

MM/DD/YYYY

FIXED FEE CATEGORY 1

Music Lessons

OR

☒

Remove any fixed fee from selected family

Enable to remove any fixed fees.

CANCEL

UPDATE
