

Isolate families by specific billing frequency using Membership Type

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Issue/Question

How do I isolate specific families for specific billing frequencies?

Resolution

One way to isolate specific families when billing tuition is to use Membership Type (on the Family record > Billing Info tab). For example, Membership Types might be Monthly, Annual, Semester, etc.

1. Create Membership Types by going to the **Gear** (icon) > **Settings** > **General** > **Drop-down Lists** (left menu).
2. Click **Membership Type** under Family from the choices on the left.
3. Use the **Add Row** button to add a new type.
4. Click **Save Changes**.
5. Add a Membership Type to a family on the Billing Info tab of their Family record. Choose a **Membership Type** from the drop-down list.
6. Click **Save Changes**.

Post tuition fees to specific Membership Types by selecting a type in the Membership Type field in Post Tuition Fees.
