

Archive a Family Account

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To archive a Family Account, children in the family must first be **dropped from all classes** they are enrolled in. Dropping a child from a class can be done in a few ways:

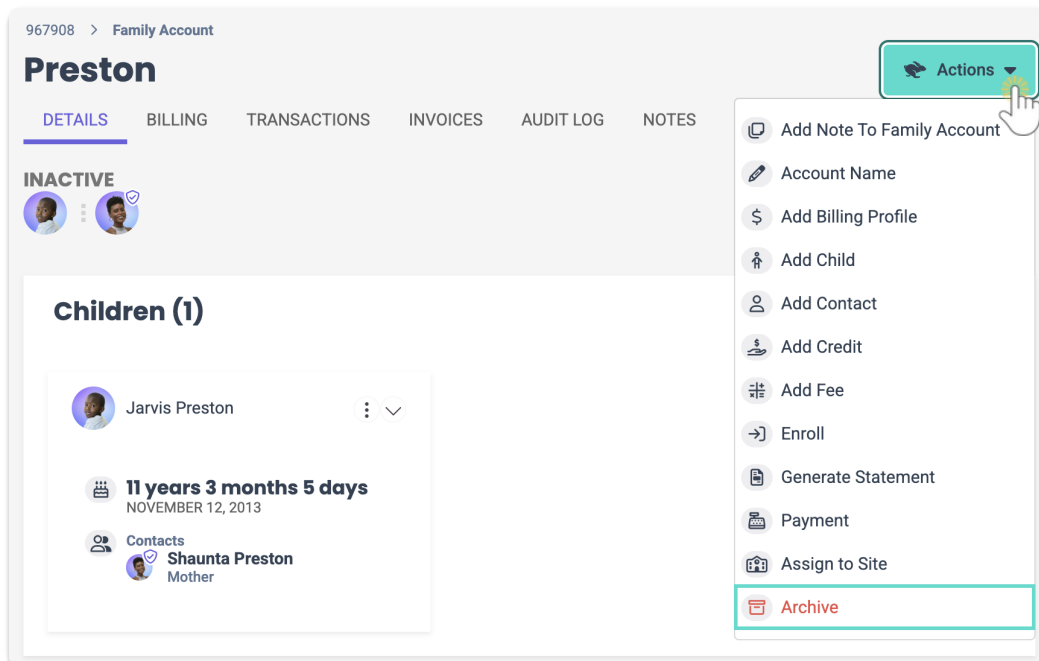
- Drop a child directly on the Openings Over Time page.
- Drop a child from the Enrollments tab on a child's details page.
- Drop a child from a Class from the Programs & Classes > Enrollment tab.

Expand/Collapse All

Archive a Family

After all children in a family are dropped from classes, follow these steps to archive the family:

1. Go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts** or use **Search** at the top of the page to locate a family.
2. Locate and click the family name. The family will be listed as **inactive** because no children are enrolled in classes.
3. Click the **Actions** menu  > **Archive** from any tab in the Family Account.



The screenshot shows the 'Preston' family account page. At the top, it says '967908 > Family Account'. Below that, the name 'Preston' is displayed. There are tabs for 'DETAILS', 'BILLING', 'TRANSACTIONS', 'INVOICES', 'AUDIT LOG', and 'NOTES'. The account status is 'INACTIVE'. Under 'Children (1)', there is a card for 'Jarvis Preston' with a date of birth '11 years 3 months 5 days' (NOVEMBER 12, 2013) and a contact 'Shaunta Preston' (Mother). On the right side, there is an 'Actions' dropdown menu with a hand cursor pointing to it. The menu items are: Add Note To Family Account, Account Name, Add Billing Profile, Add Child, Add Contact, Add Credit, Add Fee, Enroll, Generate Statement, Payment, Assign to Site, and Archive (highlighted in red).


4. Type **ARCHIVE** in the field and click the **Archive** button.



Once a family is archived, delete any bookmarked links to their account in your browser to avoid potential errors.

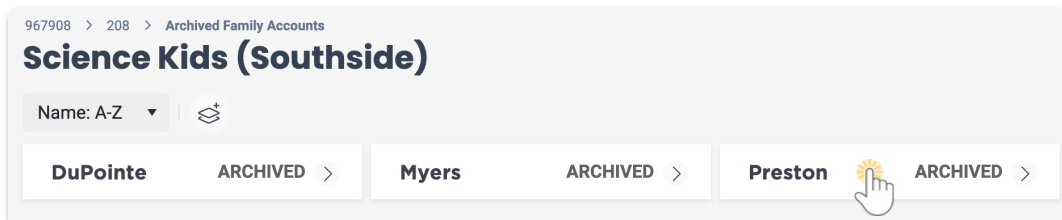
Reinstate a Family Account


There may be instances when a Family Account was archived, and you would like to reinstate the account.

1. Go to **Settings** (left menu) > **Site Settings** card > **View Details**.
2. Click the **Actions** menu  > **Archived family accounts**.



3. Select the card for the family you want to reinstate to open the Family Account page.



4. Click the **Actions** menu  > **Reinstate**.
 - o You will see a confirmation message in the upper right letting you know the account has been reinstated.
 - o The family's account is immediately moved to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts** > **Family Account** page.
 - o The family will be listed as **Inactive** because the child in the account is not enrolled in any classes.

