



InTouch Manager – Customer Groups

[Overview](#)

Customer groups are a very convenient method of focusing reporting, mass fees and mass billings as a group instead of processing at the individual student level.

There are three types of customer groups:

1. Pricing groups which will apply to the InTouch item being processed, fee'd and/or billed,
2. Reporting groups – generate reporting based on the students and non-students in a group
3. Billing and mass fee processing groups – which students and non-student accounts will be processed

[Rules for Customer Groups](#)

There really are not rules for customer groups – they are designed to be open to the site authorized user and flexible in management. A user can add and/or remove a student/non-student from most customer groups at will.

[Samples of Customer Groups](#)

Price shifting groups: free group, reduced group, district employee group

Reporting groups: students in the DECA club, students in Ms. Evans' class, all volleyball players

Billing/mass fee processing groups: all volleyball players, all seventh graders, all students in the club, pre K students at a building (before and after school care), participants in a summer camp program



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Setup of customer groups

1. InTouch Manager
2. MISC tab
3. Select customer groups
4. Add a description of the customer group for a new group
5. The bottom left hand corner of the screen allows selection of the current non members of the group to become members of the group
 - a. Select a site or all sites (selection is not limited to just the one site's customer)
 - b. Find customers by
 - i. Selecting from the list
 - ii. Customer ID sort, last name sort, or grade sort – the grade sort is a good way to build all seventh graders, for example
 - c. Add customers by
 - i. Clicking on customer and then clicking 'Add'
 - ii. Basic windows using shift + select or control + click to highlight many customers
 - iii. Need to add to the group whatever method utilized

System

The System property of a customer group indicates the group is not able to be edited by a user, and is usually updated by an automated process (e.g. maintenance of Free and Reduced groups).

Removing Groups

Select group at top of screen and click on delete at the right side

Group type not defined when setting up

Groups can be a reporting, billing and processing group all the same, when setting up a group there is no definition to the type of group during the setup.



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Exhibit

In this example – Astronomy club would be a fee or billing group, Free and Reduced would be payment groups, Ms. Evans' group would be a class

The screenshot displays the 'InTouch Manager - Customer Groups' application window. At the top, there is a 'File' menu and a 'Site' dropdown menu set to 'NORTH HIGH SCHOOL'. Below this is a list of customer groups with columns for 'Description', 'System', and 'Delete'. The groups listed are: Astronomy Club, Baseball Team, CHILD AND DEPENDENT CARE REPORTING, Free, Math Club, MS. EVANS' GROUP, Reduced, Soccer, and Waiver. Each group has a checkbox in the 'System' column and a 'Delete' button.

Below the list is the 'Non-Members' section, which includes a 'Customers' tab and an 'AD Teams' tab. The 'Customers' tab is active, showing a table with columns for 'Customer #', 'Last Name', 'First Name', and 'Grade'. The table contains 20 rows of customer data. To the right of this table are 'Add' and 'Remove' buttons.

To the right of the 'Non-Members' section is the 'Members' section, which has a table with columns for 'Customer #', 'Last Name', 'First Name', and 'Grade'. This table is currently empty.