Family Groups

What are Family Groups

A new feature has been included in Practice Manager 5.0 called **Family Groups**. Practice Manager has always had the ability to group related clients by Parent/Child (Billing Groups) relationship. This was setup as parent and child relationship in the Client Group tab. This Group tab has been renamed in Practice Manager 5.0 to be the **Billing Group** tab. This billing group functionality has been primarily used for creating a single invoice bringing together work in progress from multiple related clients and for reporting.

Family Groups is an additional feature that allows you to group related entities using a label rather than an actual client in the database. This allows you to group related clients in a far broader sense than simply for billing purposes.

Example 1: A superannuation fund is always invoiced separately and hence is not included in the billing group with the company, trust and individuals. However for the purposes of reporting you would want to include the superannuation fund invoices in the total invoices for the group.

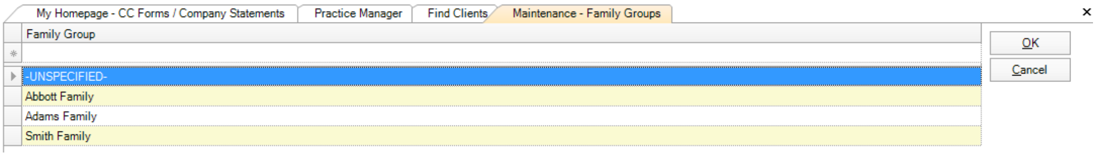
Example 2: A true family group may include several family members and their related entities. For billing purposes, each family member will have their own billing groups; however your practice would like to know the value of an extended family group to the practice.

Name	Billing Group	Family Group
Peter Abbott	Abbott and Rankine Pty Ltd	The Abbott Family Group
Sally Abbott		
Abbott and Rankine Pty Ltd		
Abbott Family Trust		
Robert Abbott	ABC Company Pty Ltd	
ABC Company Pty Ltd		
ABC Family Trust		
ABC Family Superannuation Fund		
Richard Abbott	Richard Abbott Family Trust	
Mary Louise Abbott		
Richard Abbott Family Trust		
RA & MLA Partnership		

To setup Family Groups

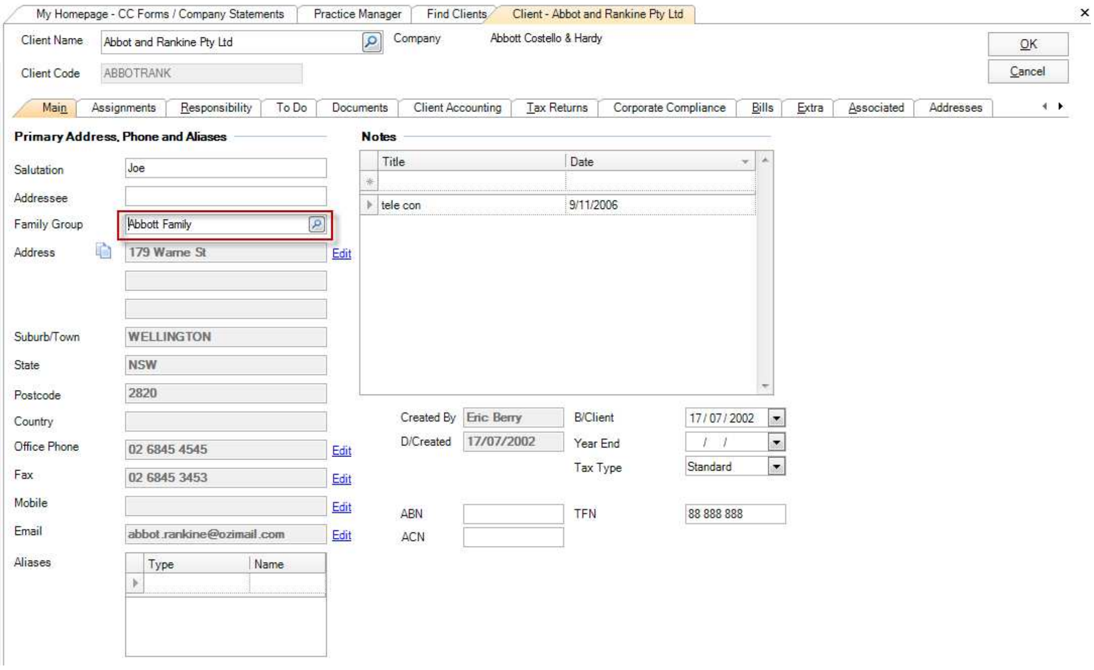
To setup the family group labels a new menu has been included under

Maintenance > Maintenance Map > Family Groups



How to add a Family Group to a client

Once the label has been created, you set a client as being part of that family group, by selecting the **Family Group** in the client's **Main** tab. Click on the **Search** icon in the Family Group field to open the **Find Family Group** dialog. As with all details entered on the Client > Main tab, this is saved when you switch to any other tab of this client, or when you click **OK.**

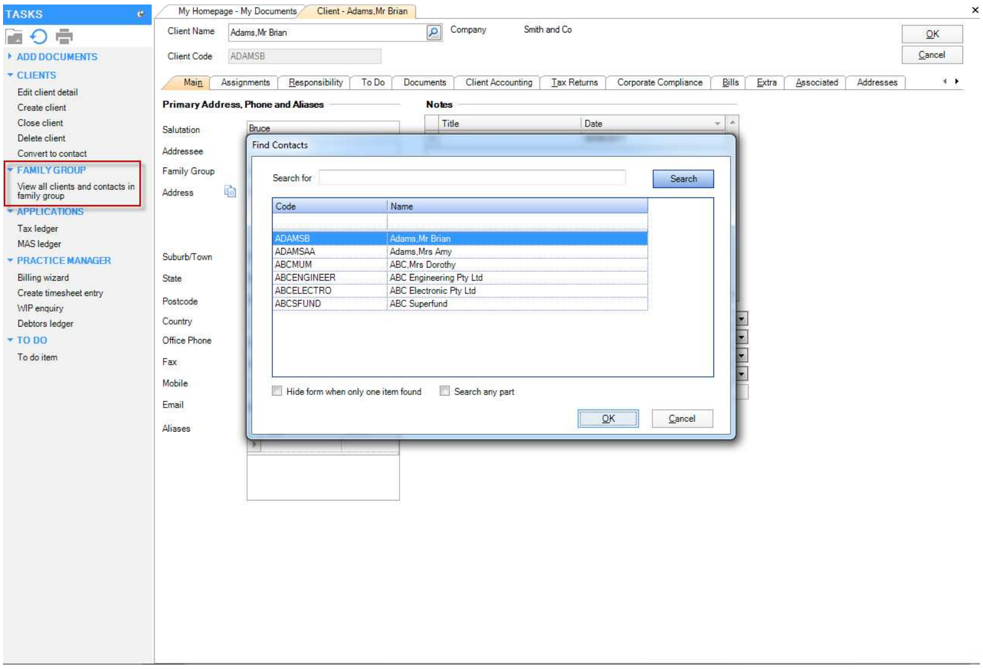


Field available in reporting

The family group is available in all reporting areas throughout the software as a new field.

Family groups can now also be viewed from:

- The client's **Main** tab, by selecting the task **View all clients and contacts in family group**



- From the **Debtors Ledger** of a client in a family group, by selecting the task **Family group aged balances**.