Managing a Trip or Fee with the Command Center

Financials & Trips · https://docs.dacapoinventory.com/doc/manage-trips/

The **Command Center** brings the major parts of trip, event, and fee management into one organized page. Depending on the setup type and visible modules selected, you can manage the roster, payments, forms, transportation, hotels, tickets, meals, chaperones, itinerary items, tasks, and reports.

This page may be used for:

- Field trips
- Music trips
- Festivals
- Performances or events
- Band fees
- Marching band fees
- Band camp fees
- Uniform fees
- Other student financial obligations

Each trip or fee can be customized so that only the sections you need are shown. For example, a simple band fee may only need a roster, payments, forms/requirements, and reports. A field trip may also use transportation, hotels, room assignments, meals, chaperones, ticket reservations, itinerary items, and planning tasks.

Getting Started

1. Open the trip or fee from your trip / fee management area.

2. Review the summary boxes at the top of the page. These give you a quick snapshot of students, chaperones, payments, balances, and form completion.
3. Use the **Jump to module** tabs to move quickly between active sections.
4. Use **Visible Modules** to turn sections on or off for the current trip or fee.
5. Work through the sections that apply to the item you are managing.

Tip: You do not need to use every module. Turn on only the sections that apply to the trip, event, or fee you are managing.

Visible Modules

The **Visible Modules** area controls which sections appear on the page. This helps keep the page focused and prevents teachers from seeing sections they do not need.

For a band fee or other student fee, you may only need:

- Roster
- Payments
- Forms / Requirements
- Reports

For a field trip or event, you may also want to use:

- Transportation
- Hotels / Rooms
- Tickets / Reservations
- Meals
- Chaperones / Staff
- Itinerary
- Tasks / Checklist

To update the visible modules:

1. Go to the **Command Center Modules** area.
2. Find the **Visible Modules** section.

3. Check the modules you want to use.
4. Uncheck any modules that do not apply.
5. Click **Save Visible Modules**.

After saving, the page will show tabs for the selected modules. You can use those tabs to jump directly to each section.

Recommended Workflow

For most trips, events, or fees, the easiest workflow is:

1. Build the roster by selecting the students who should be included.
2. Review payments and apply any payments, credits, or vendor payment information.
3. Add forms or requirements that students must complete.
4. Turn on and complete any additional modules that apply.
5. Use reports to print, export, or review information.

For a **simple fee**, you may only need to complete the roster, payments, forms/requirements, and reports.

For a **field trip or event**, you may also need to add transportation, hotels, meals, tickets, chaperones, itinerary items, and tasks.

Roster

The **Roster** section is where you manage which students are included in the trip, event, or fee. The rest of the Command Center depends on the roster because payments, forms, transportation, rooms, meals, tickets, and reports are connected to the students who are selected.

What you can do in the Roster section

- Select students who are included.
- Add all students shown in your current list or filter.
- Remove students from the trip or fee when appropriate.

- Use the roster as the foundation for payments, forms, transportation, rooming, meals, reservations, and reports.

Tip: Build the roster first. Once the roster is correct, the other modules will be much easier to manage.

Payments

The **Payments** section helps you track money connected to the trip, event, or fee. This may include student payments, applied credits, balances, fundraising, and vendor payments.

What you can do in the Payments section

- Review student payment information.
- Record payments when needed.
- Apply credits to students.
- Track payments made to vendors.
- Review balances due.
- Print statements when needed.

This section is useful for keeping financial information organized in the same place as the roster and related details.

For a **band fee** or **other student fee**, this may be the primary section you use after building the roster.

Forms / Requirements

The **Forms / Requirements** section lets you track additional paperwork and completion items. This can include permission slips, medical forms, behavior agreements, emergency forms, required documents, uniform agreements, band camp forms, or other teacher-created requirements.

What you can do in Forms / Requirements

- Add a requirement name.

- Choose the type of requirement.
- Set a due date.
- Choose whether the requirement is required.
- Choose whether it is visible to parents.
- Mark students complete or incomplete.
- View missing requirements.
- Use the completion grid to review everyone at once.

Forms / Requirements tabs

Overview: Add requirements and review current totals.

Missing Report: See which students are missing one or more requirements.

Completion Grid: View requirement completion across the roster.

Tip: Use this section for anything that must be collected, submitted, acknowledged, or checked off.

Transportation

The **Transportation** section helps you create buses or vehicles and assign students and chaperones to them. This is useful for bus lists, driver information, pickup and drop-off locations, and transportation reports.

This section is most useful for field trips, festivals, performances, and other events involving travel.

What you can add for each bus

- Bus name
- Capacity
- Bus company
- Driver name
- Driver phone
- Pickup location
- Drop-off location

- Departure date and time
- Return date and time
- Notes

How to assign riders to a bus

1. Add the bus or buses first.
2. Go to the unassigned trip riders list.
3. Check the students or chaperones you want to assign.
4. Choose the bus from the dropdown.
5. Click **Assign Selected Riders**.

Transportation tabs

Transportation / Buses: Add buses, edit bus details, and assign riders.

Bus Roster: Review, print, or export the bus roster.

Tip: If you need to move several students or chaperones from one bus to another, use the checkboxes and the move option instead of editing each person one at a time. Chaperone bus assignments are also reflected in the Chaperones / Staff section automatically.

Hotels / Rooms

The **Hotels / Rooms** section is designed for overnight trips. It allows you to store hotel information, create rooms, assign students and chaperones to rooms, and review rooming lists.

This section is usually not needed for a simple fee.

What you can add for each hotel

- Hotel name
- Phone number
- Address
- Contact name

- Contact email
- Confirmation number
- Room block name
- Check-in date and time
- Check-out date and time
- Room block deadline
- Rooming list due date
- Contract file or link
- Notes

Adding rooms

After adding a hotel, you can create rooms. Rooms can include labels, room numbers, capacity, floor, room type, bed type, room group, supervision group, and notes.

You can add rooms in two ways:

- **Create multiple rooms at once:** Use the room row area, click **Add Another Room** as needed, then save them together.
- **Add a single room:** Use the single-room form when you only need to add one room.

How to assign students or chaperones to rooms

1. Add the hotel.
2. Create the rooms.
3. Go to the unassigned occupants list.
4. Check the students or chaperones you want to assign.
5. Select the room.
6. Click **Assign Selected**.

Hotels / Rooms tabs

Hotels / Rooms: Add hotels, create rooms, and assign occupants.

Rooming List: Review, print, or export room assignments.

Tip: Use room groups or supervision groups to organize rooms by floor, hallway, ensemble, teacher group, or chaperone coverage area.

Tickets / Reservations

The **Tickets / Reservations** section helps track items that must be reserved, received, assigned, or distributed. This can include show tickets, festival admission, museum admission, wristbands, meal vouchers, group reservations, transportation reservations, hotel confirmations, and other trip or event-related items.

What you can track

- Reservation name
- Reservation type
- Vendor
- Vendor contact information
- Event date and time
- Location
- Confirmation number
- Delivery method
- Quantity needed
- Quantity reserved
- Quantity received
- Quantity distributed
- Cost each
- Total cost
- Due date
- Received date
- Digital link or file path
- Parent visibility
- Notes

Two common ways to use this module

Count-only tracking: Use this when you only need totals, such as 80 admission tickets reserved and 80 received.

Individual assignment: Use this when specific students or chaperones need specific tickets, voucher codes, wristbands, seats, or distributed items.

Tickets / Reservations tabs

Tickets / Reservations: Add reservation items and assign them when needed.

Reservation Summary Report: Review totals, missing items, vendor information, and reservation status.

Assignment Reports: Review assignments, seat lists, distribution lists, and parent-safe summaries.

Tip: Use the distributed checkbox when tickets, vouchers, wristbands, or other items have actually been handed out.

Meals

The **Meals** section helps track meal plans, student choices, allergies, dietary notes, and voucher distribution.

This section is most useful for trips or events where meal counts, meal choices, or dietary needs must be organized.

What you can add for each meal

- Meal name
- Meal type
- Meal date and time
- Location
- Vendor
- Confirmation number
- Contact name

- Contact phone
- Contact email
- Choice due date
- Whether the meal is included in the trip cost
- Whether student choice is required
- Whether a voucher is required
- Notes

Meal options and student choices

After adding a meal, you can add meal options. Examples might include chicken, pasta, vegetarian, gluten-free, or “bring your own lunch.”

For each student or rider, you can save:

- Selected meal option
- Custom choice
- Allergy flag
- Allergy note
- Dietary note
- Voucher distributed status
- Notes

Meal tabs

Overview: Add meals, add meal options, and record choices.

Reports: Review meal counts, missing choices, allergy or dietary flags, student assignments, and voucher distribution.

Tip: Meal choices and voucher distribution are separate. A student can have a completed meal choice even if the voucher has not been handed out yet.

Chaperones / Staff

The **Chaperones / Staff** section helps manage adult contacts, approvals, and coverage assignments. This section can be used for parent chaperones, staff members, nurses, administrators, or other adults helping with a trip or event.

This section is usually not needed for a simple student fee.

Tip: Bus assignments stay connected between the Transportation section and the Chaperones / Staff section. If you assign a chaperone to a bus from the Chaperones / Staff section, that chaperone will also appear on the bus roster. If you assign or move a chaperone from the Transportation section, the chaperone's bus coverage assignment will be updated automatically.

What you can track for each adult

- Name
- Role
- Phone
- Email
- Emergency contact name
- Emergency contact phone
- Background check status
- Approval status
- Notes

Assignment areas

Chaperones and staff can be assigned to different coverage areas, including:

- Bus
- Hotel room
- Hotel or floor group
- Student group
- Meal coverage

- Ticket distribution
- General supervision

Chaperones / Staff tabs

Overview: Add adults, edit contact information, and create coverage assignments.

Reports: Review contact lists, assignment lists, bus coverage, hotel or floor coverage, and emergency contact information.

Tip: Use assignments to make sure every major area of the trip has adult coverage. This is especially helpful for buses, hotel floors, meals, and ticket distribution.

Itinerary

The **Itinerary** section allows you to build a chronological schedule for a trip or event. Each itinerary item can have different visibility settings so you can control what is shared with parents, chaperones, students, or kept internal.

This section is most useful for field trips, festivals, performances, and multi-step events.

What you can add for each itinerary item

- Title
- Type
- Start date and time
- End date and time
- Location
- Address
- Map link
- Sort order
- Parent visibility
- Chaperone visibility
- Internal-only status

- Notes

Visibility options

Visible to parents: Use this for items families should see.

Visible to chaperones: Use this for items adult supervisors should see.

Internal only: Use this for private planning notes, supervision details, or staff-only reminders.

Itinerary tabs

Overview: Add and edit schedule items.

Reports: Generate full internal, parent-safe, chaperone, and student itinerary reports.

Tip: Items are grouped by day and ordered by start time. Use the sort order field when two items happen at the same time but need to appear in a specific order.

Tasks / Checklist

The **Tasks / Checklist** section helps you manage planning work before and during a trip, event, or fee collection period. You can create custom tasks, assign them to trip or fee managers, set due dates, and mark tasks complete.

What you can track for each task

- Task name
- Category
- Assigned teacher
- Due date
- Priority
- Sort order
- Notes
- Completion status

Checklist filters

The checklist can be filtered to help you focus on the work that matters most. You can filter by category, assigned teacher, incomplete tasks, overdue tasks, or tasks assigned to you.

Tasks / Checklist tabs

Overview: Add tasks, edit task details, and mark items complete.

Checklist Report: Print or export the current checklist.

Tip: Use categories such as Transportation, Hotel, Meals, Forms, Payments, Tickets, or General Planning to keep the checklist organized.

For a fee, you might use tasks for reminders such as “Send payment reminder,” “Check missing forms,” or “Review unpaid balances.”

Reports

The **Reports** section brings together information so you can review, print, or export what you need. Reports are especially useful once the roster and related modules have been filled in.

Examples of reports you may use

- Roster
- Payment information
- Form or requirement completion
- Bus rosters
- Rooming lists
- Ticket or reservation summaries
- Meal counts and allergy or dietary reports
- Chaperone assignments
- Itinerary reports
- Task checklists

Tip: Some reports are designed for internal teacher use, while others are designed to be parent-safe or vendor-safe. Review the report before sharing it outside your school or district.

Email Families

When available, the **Email Families** button allows you to send a related message to families based on the students in your current roster, list, or search results.

This is helpful for:

- Payment reminders
- Missing form reminders
- Trip updates
- Fee reminders
- Departure time updates
- Packing information
- Schedule changes
- Last-minute announcements

Before sending, review the subject, message body, and selected recipient list carefully.

Best Practices

Start with the roster

Most other modules depend on knowing which students are included. Once the roster is correct, payments, forms, transportation, rooms, meals, tickets, and reports are easier to manage.

Only turn on the modules you need

This keeps the page easier to manage. A band fee may not need transportation, hotels, meals, tickets, chaperones, or itinerary sections.

Add setup items before assigning students

For trips and events, add buses, hotels, meals, and reservations before assigning students. This makes the assignment process faster.

Use notes fields carefully

Notes can help document special situations, but be careful with sensitive student, medical, family, or financial information.

Use reports before the trip, event, or fee deadline

Print or export reports to check for missing forms, unpaid balances, unassigned students, rooming issues, meal choice problems, or incomplete tasks.

Use parent-safe reports when sharing with families

Internal notes and private supervision information should not be shared unless appropriate.

Common Questions

Do I need to use every module?

No. Each trip or fee can show only the modules that apply. For a simple fee, you may only need roster, payments, forms/requirements, and reports.

Can I use this page for something that is not really a trip?

Yes. The Command Center can also be used for band fees and other student fees. For a fee, you may only need the roster, payments, forms/requirements, and reports sections. You can turn off modules that do not apply.

Why should I build the roster first?

The roster tells the system which students are included. Once students are on the roster, they can be connected to payments, forms, buses, rooms, meals, tickets, and reports.

Can I use the hotel section for chaperone rooms?

Yes. Rooms can be marked as chaperone or staff rooms, and chaperones can be assigned to hotel rooms or supervision areas.

Can I track tickets without assigning them to individual students?

Yes. You can use Tickets / Reservations for count-only tracking, such as the number of tickets needed, reserved, received, and distributed.

Can I track allergies or dietary needs?

Yes. The Meals section includes allergy flags, allergy notes, dietary notes, meal choices, and voucher tracking.

Can I make part of the itinerary private?

Yes. Each itinerary item can be visible to parents, visible to chaperones, or marked internal only.

Should I hide modules I am not using?

Yes. Hiding unused modules keeps the page cleaner and makes the Command Center easier to use.

Final Checklist Before the Trip, Event, or Fee Deadline

For a **field trip or event**, review the following:

- Confirm the roster is accurate.
- Review student balances and payment information.
- Check forms and requirements for missing items.
- Confirm all students and chaperones are assigned to transportation.
- Confirm hotel rooms and rooming lists, if applicable.
- Confirm tickets, reservations, vouchers, and distributed items.
- Review meal choices, allergies, dietary notes, and meal counts.
- Confirm chaperone and staff assignments.
- Review the itinerary and visibility settings.

- Complete or update planning tasks.
- Print or export any needed reports.

For a **band fee or other student fee**, review the following:

- Confirm the roster is accurate.
- Review payments and unpaid balances.
- Check forms or requirements, if applicable.
- Send reminders to families, if needed.
- Print or export payment or roster reports.
- Hide or archive the item when it is no longer active.