


Work with a Family's Transactions

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The Transactions tab in a Family Account shows you the three steps of the automatic billing workflow. You can make changes to invoices in the *Scheduled* and *Pending* sections. However, once the billing invoice moves to the *Ledger* section, the invoice is considered a historical reference and cannot be changed.

The screenshot shows a web interface for a Family Account. At the top, it says '967908 > Family Account' and 'Cho'. Below this are navigation tabs: 'DETAILS', 'BILLING', 'TRANSACTIONS' (which is selected), 'INVOICES', and 'AUDIT LOG'. The main content area displays the 'Family Balance' as '\$586.56' with a downward arrow icon. Below this, it shows 'Aurora Cho Balance' as '\$586.56'. Further down, it lists 'Last Payment Jul 18, 2024' as '\$800.00' and 'Last Invoice Aug 24, 2024' as '\$100.00'. A section titled 'Multi-site Balances' follows, listing 'Science Kids (Northside)' as '\$0.00', 'Science Kids (Southside)' as '\$586.56', and 'Science Kids (Westside)' as '\$0.00'.

Category	Balance
Family Balance	\$586.56
Aurora Cho Balance	\$586.56
Last Payment Jul 18, 2024	\$800.00
Last Invoice Aug 24, 2024	\$100.00
Multi-site Balances	
Science Kids (Northside)	\$0.00
Science Kids (Southside)	\$586.56
Science Kids (Westside)	\$0.00

The *Family Balance* appears at the top of the Billing and Transactions tabs in a Family Account. Click the **Expand** icon  to see more details about the family's balance, such as the balance for each Payer, last payment date, last invoice date, and the balance owed for each site.

Expand/Collapse All

▢ Scheduled

▢ Pending

▢ Ledger Transactions