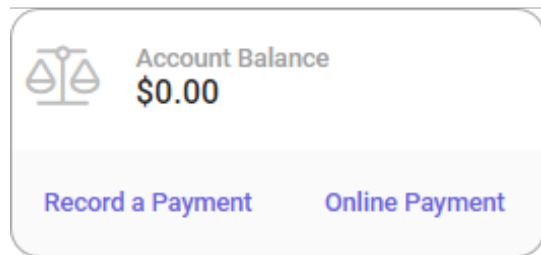


Work with a Family's Transactions

Last Modified on 05/23/2023 4:56 pm EDT

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 However, once the billing invoice moves to the *Ledger* section, the invoice is considered a historical reference and cannot be changed.

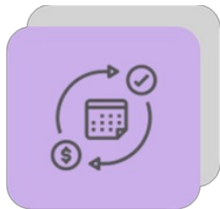


The *Account Balance* appears at the top of the *Billing* and *Transactions* tabs in a family account. Use the links to [Record a Payment](#) or process an [Online Payment](#).

- The scale is balanced (no balance is due, paid in full)
- The scale tips to the left (there is a credit)
- The scale tips to the right (there is a balance due)

Transactions Tab Steps

Step 1 - Scheduled



After a [New Tuition Fee or Recurring Fee](#) is created, it will appear in the *Scheduled* section, it's scheduled and waiting to be invoiced after the current Billing Cycle.

Changes can be made to invoices in this section. The fees automatically move from *Scheduled* to *Pending* on the Scheduled Date at 11:59pm.

Step 2 - Pending (Invoice Preview)



Recurring Fees move from **Step 1 - Scheduled** to **Step 2 - Pending** and will process in 24 hours on the Transaction Date.

- One-time Fees are placed in the *Pending* section immediately.
- A Recurring Credit is placed in the *Pending* section and the *Scheduled* section for the upcoming Billing cycle.

Pending invoices can be edited or deleted in the *Pending* section.

Step 3 - Ledger Transactions (Family Ledger)

After a fee is invoiced to the **Payer** on the Transaction Date, it moves to the *Ledger Transactions* section.



All billing and payments for the Family Account are listed in the *Ledger Transactions* section:

- Invoices
- Payments

This section is for information only and can't be edited or deleted.



An invoice can be processed immediately in the *Pending* section of the *Transactions* tab. Just select the check box for the fee or credit and click the **Invoice Now** Invoice Now button.
