

Financial Reporting - Overview

Last Modified on 09/20/2024 2:18 pm EDT

For a quick overview of your business's financial health, the Jackrabbit Care Finances section shows you the information you need. Go to **Finances** (left menu) > **Overview** link on the *Reports* card, where you can do the following:

- ☀️ Monitor your business financials in real time.
- ☀️ View financial data visuals with an overview of posted, scheduled, pending, and past due fees.
- ☀️ Access additional financial report information.

Note: Only Owners and Administrators have permission to access the Finances section.

Overview Tab

See the legend below to see how each section of the financial overview functions.

967908 > 208 > Financial Reports

Financial Reports

OVERVIEW REPORTS

September 19, 2024

1

Status	Percentage
Scheduled	28.4%
Pending	28.4%
Posted	21.6%
Past Due	21.6%

2

Posted	\$800.00
Scheduled	\$1,050.00
Pending	\$1,050.00
Past Due	\$800.00

Billing & Payments

Totals for September 2024

Category	YTD
Total Billed (Invoices)	\$3,620.00
Total Paid (Invoices)	\$2,700.00

See More

3

Past Due


Top 5 of 6

Family Account	Billing Profile	Past Due
Sharon	Weekly Billing Profile	\$350.00
Pham	Weekly Billing Profile	\$120.00
Summers	Weekly Billing Profile	\$120.00
Ngo	Weekly Billing Profile	\$90.00
Garcia	Weekly Billing Profile	\$90.00

See More

4

- 1 The financial dashboard widget shows percentages for posted, scheduled, pending, and past due fees. Click any of the circle's sections to go directly to its corresponding **Financial Report**.

- 2 See the totals of each fee type. Click any fee to go directly to its corresponding [Financial Report](#). Hover over the **Info** icon  for a description of each fee type.
- 3 Billing & Payments displays the total amount billed and the total amount paid for invoices so far this year. Click **See More** to view more information on the Billing & Payments report.
- 4 Past Due displays the five family accounts with the largest overdue balances. Click any of the following for more information:
 - **Family Account Name** - Go to the Family Account Details tab.
 - **Billing Profile Name** - Go to the Family Account Billing tab.
 - **See More** - Go to the Past Due report to see all families with past due balances.



Click the [Reports](#) tab at the top of the page to view all Financial Reports.
