

Generate & Print a Family Statement

Last Modified on 09/18/2024 10:39 am EDT

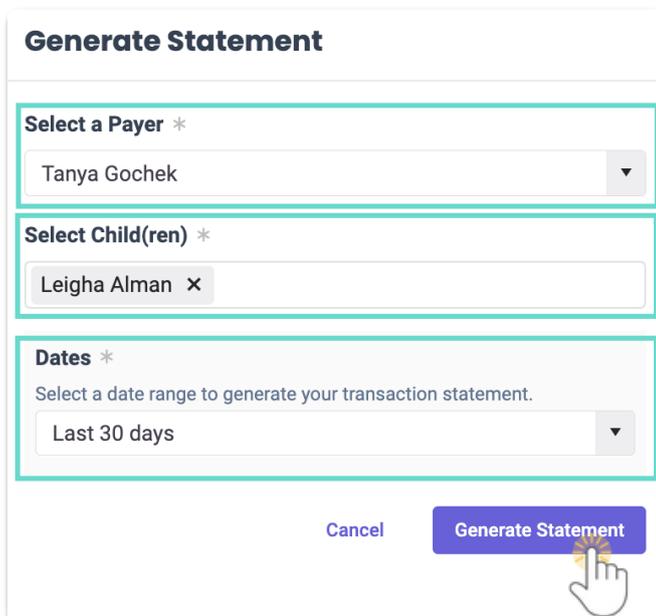
Statements display a Payer's transactions over a specified period, such as 30, 60, or 90 days, or a custom date range. They include details of payments, fees, and applied discounts for one or more children. Statements are generated as needed. Use statements to:

- ✦ Give families a detailed record of fees over a time period.
- ✦ Establish important documentation for tax purposes.
- ✦ Provide records spanning past the most recent billing period.

Generate a Statement

Ensure you have the correct site selected at the top of the page, then follow these steps to generate a statement:

1. Go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts**
2. Select the family and then go to the **Actions** menu  > **Generate Statement**.
3. Make the selections in the *Generate Statement* window, then click **Generate Statement**.
 - o Select a Payer from the drop-down list.
 - o Select the children on the account to be included on the statement.
 - o Select from the date ranges in the drop-down menu or create a custom date range.



Generate Statement

Select a Payer *

Tanya Gochek

Select Child(ren) *

Leigha Alman x

Dates *

Select a date range to generate your transaction statement.

Last 30 days

Cancel Generate Statement

4. View the generated statement and go to the **Actions** menu  > **Print** if you would like to print the statement.

Actions

Print



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10961 Burnt Mill Rd
Jacksonville, FL 32256

Phone: +1(555) 315-9204
Email: sciencekids@gmail.com
Tax ID: 999-88-9999

Tanya Gocek
Customer Account: 100009664
481 Greenbriar Rd.
Jacksonville, FL 32256

Statement 08/18/2024 - 09/18/2024

Current Balance	As of Sep 18, 2024	\$300.00
Total Charges		\$500.00
Total Payments		\$200.00

Transactions 6 Transactions

Date	Child	Description		Total
Aug 24, 2024	Leigha Alman	Tuition/Weekly Tuition for 6th 7th and 8th - Afterschool Care (3-6 PM)	100.00	\$100.00
Aug 24, 2024	Leigha Alman	Tuition/Weekly Tuition for Adventure Kids Club - All Day Care	100.00	\$200.00
Aug 31, 2024	Leigha Alman	Tuition/Weekly Tuition for 6th 7th and 8th - Afterschool Care (3-6 PM)	100.00	\$300.00
Sep 7, 2024	Leigha Alman	Tuition/Weekly Tuition for 6th 7th and 8th - Afterschool Care (3-6 PM)	100.00	\$400.00
Sep 14, 2024	Leigha Alman	Tuition/Weekly Tuition for 6th 7th and 8th - Afterschool Care (3-6 PM)	100.00	\$500.00
Sep 18, 2024		Payment - Thank you! Credit Card Paid upon pickup.	-200.00	\$300.00

08/18/2024 - 09/18/2024 6 Transactions



Families may also generate a statement on their own with **CircleTime™** by going to the Billing tab and clicking **Generate Statement**.