

View Invoices in a Family Account

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On the **Invoice Date** (defined by the Family Billing Profile), transactions in the *Pending* section of the *Family Account > Transactions* tab are moved to the *Ledger Transactions* section. Once an invoice is in the Ledger Transactions section, it is also viewable in the **Invoices** tab.



When an invoice is in the *Pending* section of the *Transactions* tab of a Family Account, you can select it with the checkbox and click the **Invoice Now** button to process the invoice immediately.

Use the **Email Invoice to Payers** button to email an invoice as needed, and the Payer(s) will receive an email with a link to the invoice. Or click the link for the invoice to open the invoice on a new tab.

The screenshot shows the Zaxby Family Account interface. At the top, there's a navigation bar with tabs for DETAILS, BILLING, TRANSACTIONS, INVOICES (which is highlighted), and AUDIT LOG. An 'Actions' button is visible in the top right. Below the navigation, there's a dropdown menu for 'Invoice Date: Most Recent'. The main content area displays the following details for an invoice:

- Invoice Number:** 0000-32151 (with a hand cursor icon pointing to the number)
- Invoice Amount:** \$510.00
- Invoice Sent Date:** Tue Dec 26, 2023
- Invoice Due Date:** Tue Dec 26, 2023
- Payers:** Sarabeth "Sara" Zaxby

At the bottom of the details section, there is a button labeled 'Email Invoice to Payers'.

Sample Invoice



Over the Rainbow Child Center
Mineola Ave
Little River, SC 29566
Tax ID: 3216549899

Bill To:
Sarabeth "Sara" Zaxby
Customer Account: #1000000343

Invoice

#0000-32151

Due Date

Dec 26, 2023

Total

Dec 26, 2023

\$510.00

Transactions

4 Transactions

Date	Child	Description	Dates of Service	Total
Dec 26, 2023	Frankie	Tuition		\$175.00
Dec 26, 2023	Frankie	Tuition		\$250.00
Dec 26, 2023	Sally	Tuition		\$35.00
Dec 26, 2023	Sally	Tuition		\$50.00