Family Invoices

Last Modified on 12/09/2024 4:29 pm EST

Invoices show transactions for a Payer during a billing period, including fees and applied discounts. Use invoicing to:

- $\{ \neq \}$ Request payment from families.
 - $m \ref{scher}$ Give families a detailed record of their dues per site for a billing period.
- Revide important documentation for tax purposes.

Expand/Collapse All

View a Family's Invoices

- 1. Go to Family Accounts (left menu) > Profiles card > View # Active Family Accounts
- 2. Select the family and then their Invoices tab.
- 3. Scroll through the invoices and click the **Invoice Number** for the invoice you wish to view more details on.

967908 > Family Account	Actions 🔻
Traska	Actions V
DETAILS BILLING TRANSACTIONS INVOICES AUDIT LOG NO	DTES
Invoice Date: Most Recent 🔹	
Invoice Number 0000-1073 Invoice Amount \$720.00 Invoice Sent Date Sat Aug 24, 2024 Invoice Due Date Sun Aug 25, 2024 Payers A Mariana Traska	

4. View the invoice similar to the one below and print it if you wish by going to your browser's options, such as **File** > **Print**.

Jackso	e Kids Burnt Mill Rd. onville, FL 322 999-88-9999				
Bill To: Mariana Traska Customer Account: #1000009656			Invoice		#0000-10735
			Due Date	Total	Aug 24, 2024
		Aug 25, 2024		\$720.00	
Transact	ions				4 Transactions
Date	Child	Description	Dates of Service		Total
Aug 24, 2024	Jake	Other fee Discount \$5.00 Recurrent	-5.00 Discount		\$20.00
					\$500.00
Aug 24, 2024	Marley	Tuition			\$500.00
Aug 24, 2024 Aug 24, 2024	Marley Marley	Tuition			\$100.00

Send Invoices to Payers

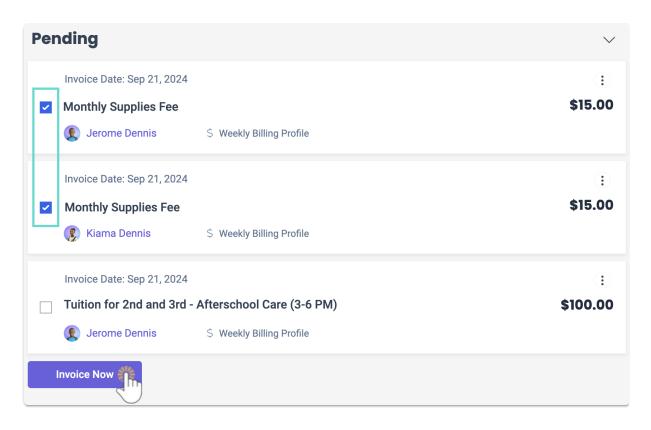
- 1. Go to Family Accounts (left menu) > Profiles card > View # Active Family Accounts
- 2. Select the family and then their **Invoices** tab.
- 3. Scroll through the invoices and click**Email Invoice to Payers** for the invoice you wish to send to the Payer listed for the invoice. The Payer(s) will receive an email with details and a link to the invoice.

967908 > Family Account	🖈 Actions 🔻
Traska	SE Actions +
DETAILS BILLING TRANSACTIONS INVOICES AUDIT LOG NOTES	
Invoice Date: Most Recent 🔹	
Invoice Number 0000-10735	
Invoice Amount \$720.00	
Invoice Sent Date	
Sat Aug 24, 2024 Invoice Due Date	
Sun Aug 25, 2024	
Payers	
ନ Mariana Traska	
A Email Invoice to Payers	

Invoice Immediately

Though invoices are created automatically, pending transactions can be invoiced immediately.

- 1. Go to Family Accounts (left menu) > Profiles card > View # Active Family Accounts
- 2. Select the family and then their **Transactions** tab.
- 3. Go to the *Pending* section and select the transaction(s) you would like to invoice immediately.
- 4. Click Invoice Now, then click Yes, Invoice Now in the Invoice Now? window.



5. View the newly created invoice by going to the family's Invoices tab.