## Financials- How to send invoices

Last Modified on 12/07/2020 7:15 am EST

To send invoices, select the Payments menu, then select the Outstanding option.

Search								Business Level - DCW - Transactional 🛛 🔻				0						
☆	Home	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	٩						
F	lome 🖂	Informatio	Journal															
_			Deposit															
	information		Third Party	y Journal		room List												
			Add/Edit T	Third Party Ref	und							Classr	oom	м	т	w	Th	F
		S	Third Party	v Refund Alloca	ation	Transacti	onal- Cente	er 1				AM,	Before School Care	8	7	8	7	8
	Birthday		Payments/	/Adjustments		Transacti	onal- Cente	er 1				Flexi Regis	ble Child Care tration	0	0	0	0	0
			Mass Change			Transacti	onal- Cente	er 1				PM,	After School Care	3	3	3	3	3
			Outstand															
- 7	0		Outstandir		b													
			Autopay B	atch d''	')													
			Online/POS Payments															

Once on the Outstanding page, select the search criteria button to display the families that match your criteria. Once criteria has been entered, select the view option.

ng r	esults for: /Exclude Selected Group::: Include this Group	Balance Type::	Outstanding	Family Status:: N/A	Auto-Pay::	N/A	_	
de	Zero Balance Families:: No 📗 Include Third Part	y Families:: Yes	Past Due:: Gr	eater Than			S	earch Criter
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)	Family	60						
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/	Brave Family (ID: 317254)	Semes	ter					
,	Dealittle Family (ID: 320241)	Ċ						
,	Erozen Family (ID: 317246)	Report	ing Group:			Include/Exclude Sele	cted Group::	
,	Giant Family (ID: 323498)	4			-	Include this Gro	oup 🔿 Exclud	le this Group
,	Oz Family (ID: 323497)	Balanc	a Tunar			Esmily Status		
,	Peter Pan Family (ID: 317251) @ M		e Type. Dutstandin <i>r</i> e		nv		Active Only	Withdrawn
/	Wonderland Family (ID: 320245)			0	- 9		0	,
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		0				9		
		Pest D	ue:			Amount:		
		0	Greater T	Than	-	Ś		
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Any family that has a check mark next to their name will be included when you send invoices.

Uncheck any families that should not receive the emailed invoice. Then select the actions menu, select the Email Statement option.

owing r nclude	results for: /Exclude Selected Group::: Include this Group B	alance Type:: Outstanding Family §	Status:: N/A Auto-Pay	:: N/A	
clude	Zero Balance Families:: No Include Third Party Fa	amilies:: Yes Past Due:: Greater Tha	an		Search Criteri
					Actions -
Out	standing Payments List	⊠Email Statement			
	Family	Balance Due	Parent Due	30 Days Past Due	Semail Reminder
	Baggins Family (ID: 323500) Beanstalk Family (ID: 323499) ⊠	440.00			Semail Invoice Er
	Brave Family (ID: 317254) ⊠	277.25			Pay Registered
~	Frozen Family (ID: 317246)	575.00			Funding Export
~	Giant Family (ID: 323498) ☑ Oz Family (ID: 323497) ☑	325.00			Funding Export Active
~	Peter Pan Family (ID: 317251) Wonderland Family (ID: 320245) ⊡	129.00 822.00	29.00		Funding Export Terminated
					Open Detail Export
					Center Copay
					Outstanding Balance Export
					Outstanding Balance - Detail
					Collection Letter
					Email Sent Reports

Press OK when the confirmation box appears.



Edit text as needed, then press Send Email.

m	Edit Email	х	
1			ast
: 3	Subject:		
ID:	Family Statement		
317	Message:		
D: 1	Please see the attached statement.	*	
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149			
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Confirmation will display when the email process has been completed.