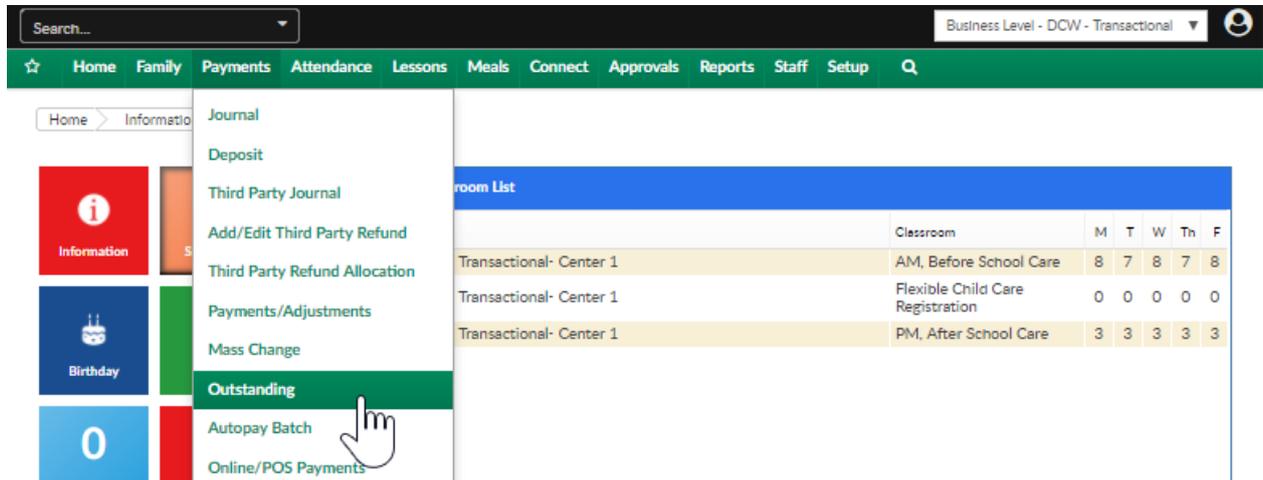


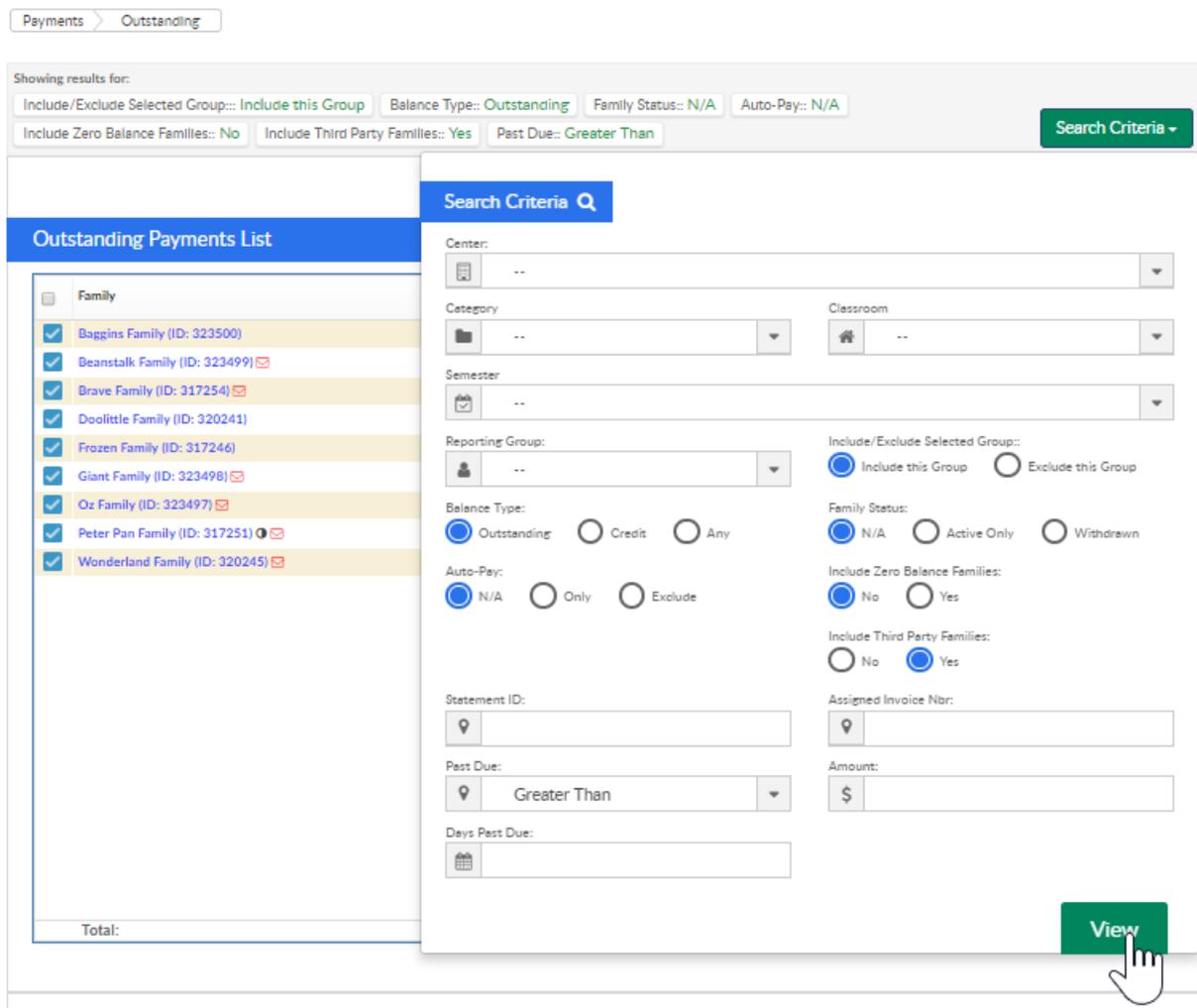
Financials- How to send invoices

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

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



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.



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.

Payments > Outstanding

Showing results for:
Include/Exclude Selected Group:: Include this Group Balance Type:: Outstanding Family Status:: N/A Auto-Pay:: N/A
Include Zero Balance Families:: No Include Third Party Families:: Yes Past Due:: Greater Than Search Criteria

Outstanding Payments List

<input type="checkbox"/>	Family	Balance Due	Parent Due	30 Days Past Due
<input checked="" type="checkbox"/>	Baggins Family (ID: 323500)	440.00		
<input type="checkbox"/>	Beanstalk Family (ID: 323499)	25.00		
<input checked="" type="checkbox"/>	Brave Family (ID: 317254)	277.25		
<input checked="" type="checkbox"/>	Doolittle Family (ID: 320241)	325.00		
<input checked="" type="checkbox"/>	Frozen Family (ID: 317246)	575.00		
<input checked="" type="checkbox"/>	Giant Family (ID: 323498)	325.00		
<input checked="" type="checkbox"/>	Oz Family (ID: 323497)	335.00		
<input checked="" type="checkbox"/>	Peter Pan Family (ID: 317251)	129.00	29.00	
<input checked="" type="checkbox"/>	Wonderland Family (ID: 320245)	822.00		

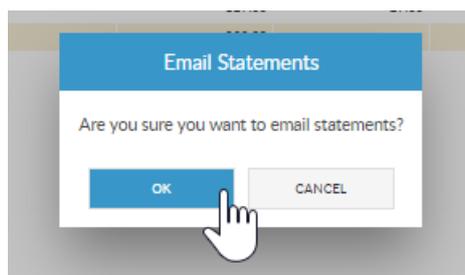
Total: \$3,253.25 \$29.00

Actions

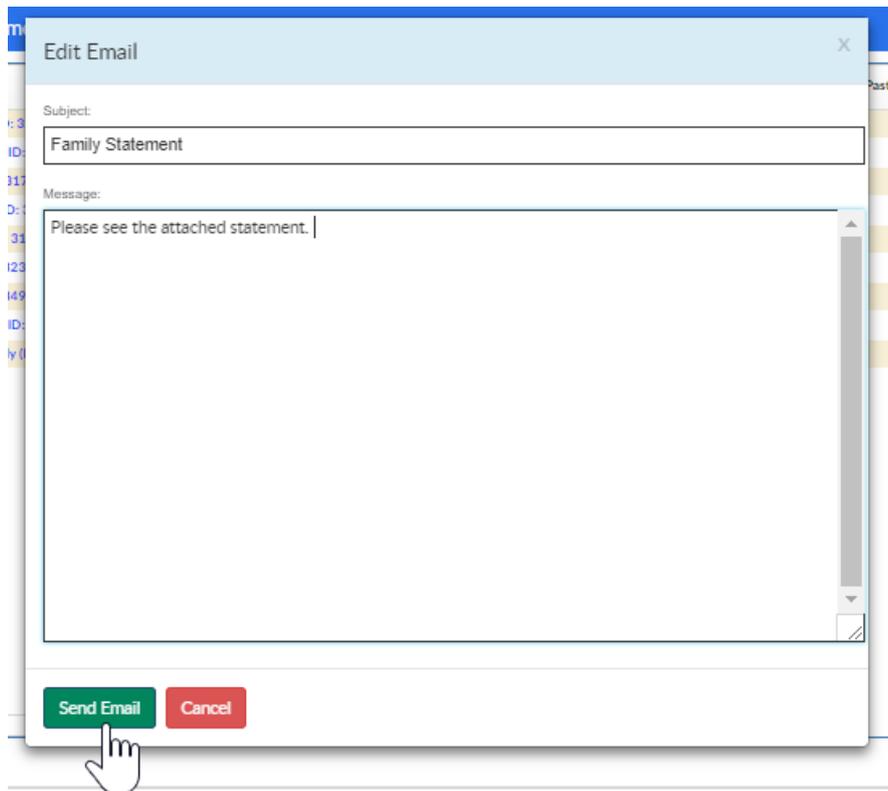
- Email Statement
- Email Reminder
- Email Invoice
- Pay Registered
- Funding Export
- Funding Export Active
- Funding Export Terminated
- Open Detail Export
- Center Copay
- Outstanding Balance Export
- Outstanding Balance - Detail
- Collection Letter
- Email Sent Reports

Emai

Press OK when the confirmation box appears.



Edit text as needed, then press Send Email.



Confirmation will display when the email process has been completed.
