Financial- How to add a late fee to multiple family accounts

There are several ways a credit (adjustment) or a fee could be added to a family account.

To add a late credit or fee to a group of family accounts go to the Payments menu, then select Outstanding.

On the Outstanding screen, use the Search Criteria option to edit the families that display in the outstanding payments list.

Once families display check or uncheck the box next to. each family's name.

- If the box is checked the family will be impacted by whatever action is selected next.
- If the box is not checked the family will not be impacted.

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 ▾

Actions ▾

Outstanding Payments List

☐	Family	Balance Due	Parent Due	30 Days Past Due	60 Days Past Due
☑	Baggins Family (ID: 323500)	430.00		0.00	0.00
☐	Beanstalk Family (ID: 323499) ✉	25.00		0.00	0.00
☐	Brave Family (ID: 317254) ✉	277.25		35.00	65.00
☐	Doolittle Family (ID: 320241)	325.00		0.00	110.00
☑	Frozen Family (ID: 317246)	545.00			
☐	Giant Family (ID: 323498) ✉	325.00		0.00	110.00
☑	Oz Family (ID: 323497) ✉	325.00		0.00	110.00
☐	Peter Pan Family (ID: 317251) ◑ ✉	175.00	75.00		
☐	Wonderland Family (ID: 320245) ✉	822.00		-10.00	316.00
	Total:	**$3,249.25**	**$75.00**		

Scroll down to the Add Fee section and select the type of fee, fee amount and post date. If an email should be sent to the selected families alerting that a fee has been added select the Yes radio button on the Email Family option- if an email should not be sent select No. Then select Add Fee.

Add Fee

Fee Type:

📍 Late Pickup Fee ▾

Fee Amount:

$ 10

Post Date:

📅 01/04/2018

Email Family: ◉ No   ○ Yes

Add Fee

When the fee has been added to the ledgers a confirmation screen will appear and will display the family, fee amount, sponsor name, email address, status and message for each ledger that has been impacted.

SUCCESS
Fee was successfully added to the selected ledgers.

Outstanding Action Report

Ledger	Fee Added	Name	To Email	Status	Message
Baggins Family (ID: 323500)	10.00	Kristina Gass		Success	Fee saved (no email sent)
Frozen Family (ID: 317246)	10.00	Queen Frozen		Success	Fee saved (no email sent)
Oz Family (ID: 323497)	10.00	Aunty Em Oz		Success	Fee saved (no email sent)

If a family is split the fee will typically be added to parent/guardian 1's ledger.