

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

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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.

The screenshot shows the 'Outstanding Payments List' interface. At the top, there are navigation tabs for 'Payments' and 'Outstanding'. Below the tabs, there are filter buttons: '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', and 'Past Due:: Greater Than'. A green 'Search Criteria' button is highlighted with a mouse cursor. The 'Search Criteria' modal is open, showing various search options: Center (dropdown), Category (dropdown), Classroom (dropdown), Semester (dropdown), Reporting Group (dropdown), Include/Exclude Selected Group (radio buttons for 'Include this Group' and 'Exclude this Group'), Balance Type (radio buttons for 'Outstanding', 'Credit', 'Any'), Family Status (radio buttons for 'N/A', 'Active Only', 'Withdrawn'), Auto-Pay (radio buttons for 'N/A', 'Only', 'Exclude'), Include Zero Balance Families (radio buttons for 'No', 'Yes'), Include Third Party Families (radio buttons for 'No', 'Yes'), Statement ID (text input), Assigned Invoice Nbr (text input), Past Due (dropdown), Amount (text input with dollar sign), and Days Past Due (text input). A 'View' button is located at the bottom right of the modal. On the left side of the 'Outstanding Payments List', there is a table with a 'Family' column and a list of family names with checkboxes: Baggins Family (ID: 323500), Beanstalk Family (ID: 323499), Brave Family (ID: 317254), Doolittle Family (ID: 320241), Frozen Family (ID: 317246), Giant Family (ID: 323498), Oz Family (ID: 323497), Peter Pan Family (ID: 317251), and Wonderland Family (ID: 320245). A 'Total:' label is at the bottom left of the 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.

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 ▾

Actions ▾

### Outstanding Payments List

<input type="checkbox"/>	Family	Balance Due	Parent Due	30 Days Past Due	60 Days Past Due
<input checked="" type="checkbox"/>	Baggins Family (ID: 323500)	430.00		0.00	0.00
<input type="checkbox"/>	Beanstalk Family (ID: 323499) <span style="color: red;">✉</span>	25.00		0.00	0.00
<input type="checkbox"/>	Brave Family (ID: 317254) <span style="color: red;">✉</span>	277.25		35.00	65.00
<input type="checkbox"/>	Doolittle Family (ID: 320241)	325.00		0.00	110.00
<input checked="" type="checkbox"/>	Frozen Family (ID: 317246)	545.00			
<input type="checkbox"/>	Giant Family (ID: 323498) <span style="color: red;">✉</span>	325.00		0.00	110.00
<input checked="" type="checkbox"/>	Oz Family (ID: 323497) <span style="color: red;">✉</span>	325.00		0.00	110.00
<input type="checkbox"/>	Peter Pan Family (ID: 317251) <span style="color: red;">✉</span>	175.00	75.00		
<input type="checkbox"/>	Wonderland Family (ID: 320245) <span style="color: red;">✉</span>	822.00		-10.00	316.00
<b>Total:</b>		<b>\$3,249.25</b>	<b>\$75.00</b>		

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.

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