

Financial- How to create a PDF copy of statements for families

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The Print Batch Statements option creates a PDF for a time period of all family statements.

From the home toolbar select the star icon, hover over Quick Links- Things To Do, then select Print Batch Statements-

The screenshot shows a software interface with a top navigation bar containing a search field and the text 'Business Level - DCW - Transactional'. Below this is a green navigation bar with menu items: Home, Family, Payments, Attendance, Lessons, Meals, Connect, Approvals, Reports, Staff, Setup. A 'Quick Links - Things To Do' dropdown menu is open, listing options: Add A New Child, Submit Payments, Take Attendance, View Room Report, View Outstanding Payments, View Payment Report, Current Statements, Print Batch Statements (highlighted with a mouse cursor), Batch And Report, Financial Reports, and Attendance Journal. The background shows a table with columns for Classroom, M, T, W, Th, F, and a footer with 'Records from 1 to 4', 'Page 1', and '50 rows per page'.

Classroom	M	T	W	Th	F
Transactional- Center 1 AM, Before School Care	8	7	8	7	8
Transactional- Center 1 Flexible Child Care Registration	0	0	0	0	0
Transactional- Center 1 PM, After School Care	3	3	3	3	3
Transactional- Center 1 Preschool	1	1	1	1	1

On the Print Batch Statements screen select the Search Criteria button and add detail to search by-

- Center
- Semester
- Category
- Classroom
- Begin Date
- End Date
- Balance As Of Date
- Include Zero Balance Families
- Include Credit Balance
- Include Inactive Families
- Include Only Children with Active Schedule
- Include Email Delivery (Create PDF Only)
- Statement Type

- o Invoice Statement
- o Customer Statement

Search... Business Level - DCW - Transactional

Home Family Payments Attendance Lessons Meals Connect Approvals Reports Staff Setup

Print Batch Statements

Showing results for:

Include Zero Balance Families:: Yes Include Credit Balance:: Yes Include Inactive Families:: No

Include Only Children with Active Schedule:: No Include Email Delivery (Create PDF only):: No [Search Criteria](#)

Document Name	Date Created
4317_12272017113159.pdf	12/27/2017 11:31:59 AM EST
4317_10232017104829.pdf	10/23/2017 10:48:29 AM EDT

Search Criteria

Center: --

Semester: --

Category: -- Classroom: --

Begin Date: End Date:

Balance As Of Date:

Include Zero Balance Families: No Yes

Include Credit Balance: No Yes

Include Inactive Families: No Yes

Include Only Children with Active Schedule: No Yes

Include Email Delivery (Create PDF only): No Yes

Statement Type: Select an Statement Type

NOTE: If run at the Business Level, no more than 1000 statements will be created.

[Create PDF](#) [Email Statements](#)

Privacy Policy

Once the file is created, select the blue hyperlink to open the file.

Print Batch Statements

Showing results for:

Include Zero Balance Families:: Yes Include Credit Balance:: Yes Include Inactive Families:: No

Include Only Children with Active Schedule:: No Include Email Delivery (Create PDF only):: No [Search Criteria](#)

Document Name	Date Created	Center	
4317_12272017113159.pdf	12/27/2017 11:31:59 AM EST	DCW - Transactional	✘
4317_10232017104829.pdf	10/23/2017 10:48:29 AM EDT	DCW - Transactional	✘

Download Statement