

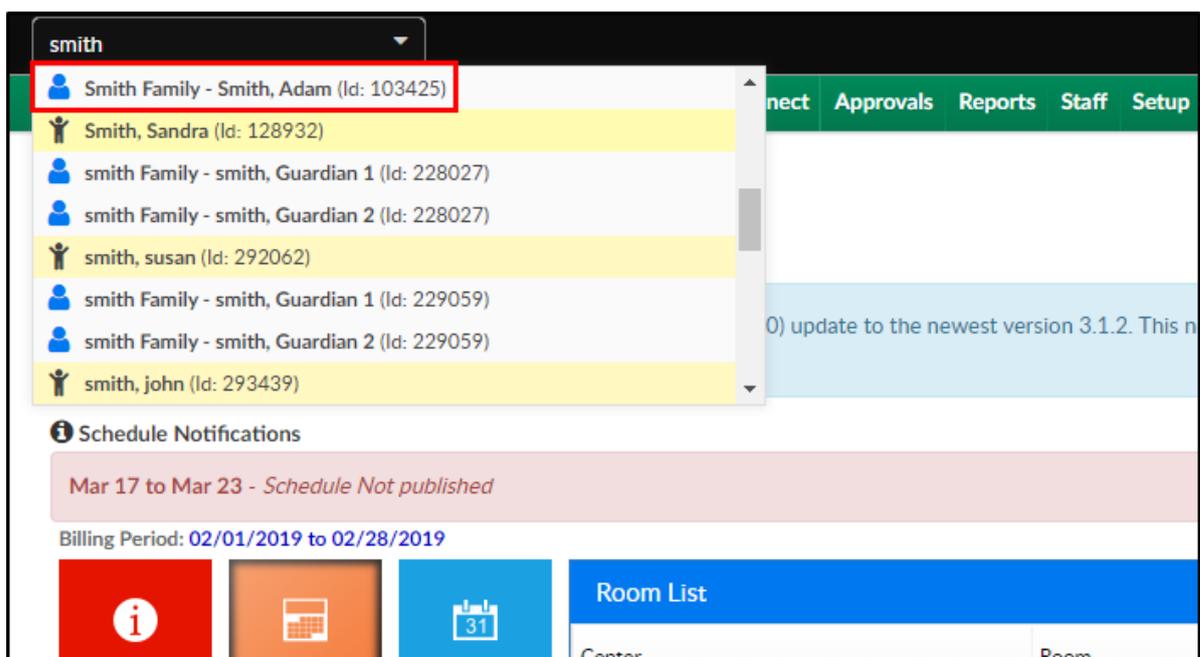
Family Record, Financials Tab - Recreate Current Statement

Last Modified on 04/02/2019 11:04 am EDT

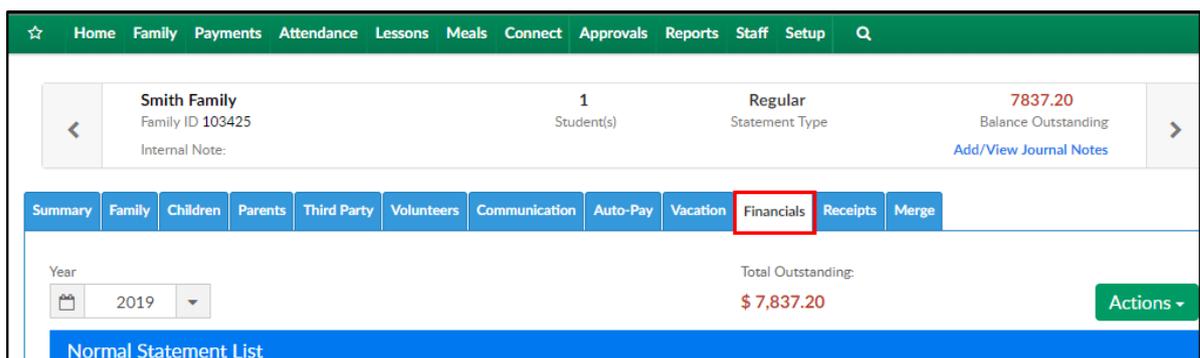
One of the features of defined billing is the ability to recreate billing for the current period. This means that if schedules have been added, attendance has been recorded, rates have been changed, or discounts have been added, the rate billed will reflect the most recent updates after recreation.

Recreate a Family's Statement

1. Search the student/family's last name in the Search... field
2. Select the family to recreate billing for



3. Ensure the Financials tab is active. Notice the balance is \$7,837.20 prior to recreating the statement



4. Click Actions, then select Recreate Current Statement

The screenshot shows the Financials screen with a navigation bar at the top containing tabs for Summary, Family, Children, Parents, Third Party, Volunteers, Communication, Auto-Pay, Vacation, Financials, Receipts, and Merge. The Financials tab is active. Below the navigation bar, there is a 'Year' dropdown set to 2019 and a 'Total Outstanding' amount of \$ 7,837.20. A red box highlights the 'Actions' dropdown menu in the top right corner. The main area displays a 'Normal Statement List' table with columns for User, Post Date, and Description. The table shows a 'Statement ID: 6919914 - Date Range: 01/01/2019 to 01/31/2019' and several rows of fees. A red box highlights the 'Recreate Current Statement' option in the Actions dropdown menu.

User	Post Date	Description
Statement ID: 6919914 - Date Range: 01/01/2019 to 01/31/2019		
	01/17/2019	Normal Fee Previous Balance Owed - 12/01/2018 - 12/31/2018
System	01/01/2019	Sandra Smith - Normal Fee - Central Falls A Big Room - 01/01/2019 to 01/31/2019
System	01/01/2019	Sandra Smith - Tuition - Central Falls BC - After Care Rooms - 01/01/2019 to 01/31/2019
System	01/01/2019	Sandra Smith - Normal Fee - Central Falls BC - Before Care Room - 01/01/2019 to 01/31/2019
		Total

5. Click OK on the confirmation popup

A confirmation dialog box titled 'Confirm' is shown. The text inside asks, 'Are you sure you want to recreate the statement?'. At the bottom, there are two buttons: 'OK' and 'CANCEL'.

6. A Success message will appear at the top of the financials screen to confirm the statement has been recreated. Also, notice the balance is now \$9,014.40

 **SUCCESS**
Statement has been recreated.

Year: Total Outstanding: **\$ 9,014.40** **Actions** ▾

Normal Statement List

	User	Post Date	Description	Fee	Payment	Balance	
Statement ID: 7294009 - Date Range: 02/01/2019 to 02/28/2019 - Current Period							
		03/15/2019	Normal Fee Previous Balance Owed - 01/01/2019 - 01/31/2019	7,837.20		7,837.20	
	 System	02/01/2019	Sandra Smith - Tuition - Central Falls BC - After Care Rooms - 02/01/2019 to 02/28/2019 Has \$42.00 Employee 2 Discount	378.00		8,215.20	
	 System	02/01/2019	Sandra Smith - Normal Fee - Central Falls BC - Before Care Room - 02/01/2019 to 02/28/2019 Has \$30.00 Employee 2 Discount	270.00		8,485.20	
	 System	02/01/2019	Sandra Smith - Normal Fee - Central Falls Big Room Z - 02/01/2019 to 02/28/2019 Has \$58.80 Employee 2 Discount	529.20		9,014.40	
			Total	9,014.40	0.00	9,014.40	
Statement ID: 6919914 - Date Range: 01/01/2019 to 01/31/2019							
		01/17/2019	Normal Fee Previous Balance Owed - 12/01/2018 - 12/31/2018	6,337.20		6,337.20	
	 System	01/01/2019	Sandra Smith - Normal Fee - Central Falls A Big Room - 01/01/2019 to 01/31/2019	672.00		7,009.20	
	 System	01/01/2019	Sandra Smith - Tuition - Central Falls BC - After Care Rooms - 01/01/2019 to 01/31/2019	483.00		7,492.20	
	 System	01/01/2019	Sandra Smith - Normal Fee - Central Falls BC - Before Care Room - 01/01/2019 to 01/31/2019	345.00		7,837.20	
			Total	7,837.20	0.00	7,837.20	