

Print Multiple Statements / Invoices

Last Modified on 12/02/2021 3:28 pm EST

Use this report to generate statements to fit your organization's needs. This may include using the Search Criteria to print statements by **Enrollment Status** and by Category 1, 2, or 3 as needed.

Note: Select one or more Categories, Students, Transaction Types, and Sub-types by holding down the CTRL key.

1. Go to the **Families** menu > **Family Reports** > **Statements-Print**.
2. Use the *Family/Account Search Criteria* to select the families whose statements you want to print. If you leave all the criteria blank, you will generate a report with statements for all currently enrolled families, or you can narrow down the selection:
 - o Select a specific Family/Account with the option to select individual or multiple students when you check off *Print Statement by Student(s)* and select the students from the drop-down list.
 - o Select Families Enrolled in Class (search for a specific class).
 - o Select Families Enrolled with Instructor (select an instructor from the drop-down list).
3. Use the *Transaction Search* section to narrow down the types and dates of transactions you want to be displayed on the statement.
4. Use the *Format Options* section to create the 'look' of the statement by selecting which family and transaction information to include. The logo, header, and footer settings are also customized here.

Tip: If you regularly use the same Statement Header and /or Footer, you can create defaults in the *Gear icon > Settings > General > Statements (left menu)*. If you need to change the default for one set of statements only, you can edit the header/footer while on the *Statements - Print* screen.
5. Click **Submit**.
 - o Statements will be created based on the settings you've chosen and opened in PDF format so that they can be printed on 8 1/2 x 11 paper.
 - o Printed statements fit into a #10 window (business size) envelope for mailing.

Statement

Huntersville
123 W. Main
Huntersville, NC 264555



www.jackrabbittech.com
Phone: (704) 555-1232
Tax ID: 16-9999999

Barbara Applegate
9883 Annabelle Lane
Huntersville, NC 28078



Family/Acct Applegate

Statement of Account

Account Summary

| | |
|---|----------------|
| Previous Balance as of September 29, 2023 | 0.00 |
| Fees | 250.00 |
| Payments/Credits | -125.00 |
| Balance as of November 28, 2023 | 125.00 |

To opt **NOT** to display this account summary, set the format option for **Show Account Summary to No.**

Transaction Summary September 29, 2023 - November 28, 2023

| Date | Type | Payment Method | Student | Class/Event | Orig Amt | Disc | Amt | Balance |
|----------|------------------|----------------|----------------|-------------------|----------|------|---------|---------|
| 09/29/23 | Previous Balance | | | | | | | 0.00 |
| 10/01/23 | Tuition Fee | Check 1091 | Toni Applegate | Karate - Beg - Th | 100.00 | | 100.00 | 100.00 |
| 10/01/23 | Tuition Fee | Check 1091 | Toni Applegate | Karate - Adv - M | 25.00 | | 25.00 | 125.00 |
| 10/27/23 | Payment | Check 1091 | | | | | -125.00 | 0.00 |
| 11/01/23 | Tuition Fee | | Toni Applegate | Karate - Beg - Th | 100.00 | | 100.00 | 100.00 |
| 11/01/23 | Tuition Fee | | Toni Applegate | Karate - Adv - M | 25.00 | | 25.00 | 125.00 |

Balance Due Upon Receipt

- Return address is set by going to the *Gear menu* > *Account* > *My Account* > *Organizational Details*.
- The family email address is taken from the contact who has **Billing Contact** set to Yes.
- Organization logo can be added from the *Gear menu* > *Settings* > *General* > *Organization Logo (left menu)*.

Expand/Collapse All

Frequently Asked Questions



Time Saver! Save your settings for frequently used statement settings. See [Favorites - Save your Report Criteria Selections](#) for instructions.

