

Print / Email Receipt From the Transactions Tab

Last Modified on 01/15/2019 12:27 am EST

A receipt for a customer's payment can be printed or emailed from the *Family* record > *Transactions* tab.

1. Select the **Pencil** icon next to the payment you want to generate a receipt for.

Family: Ager

← RETURN SAVE CHANGES DELETE

Make Sale/Post Fees Payment Refund Statement Add Student Add Contact Archive Family Family Name Email Text Push Notification Email Schedules Merge Family

Summary Contacts Classes Events Transactions Billing Info Misc

View Transaction History View Unapplied Credits & Unpaid Fees Help ?

Current Balance 207.00

Legend: Fee/Charge Payment/Credit Unpaid Fee Unapplied Credit

Last 20 (Most Recent) Transactions

View 1 - 11 of 11 Print Refresh 8 columns hidden Show/Hide Columns Restore Columns

				Date	Type	Orig Amt	Disc Amt	Amt	Unpaid Amt	Balance	Note	Pmt Meth	Student	Class/Event
			R	11/20/2018	Payment	-20.00		-20.00	0.00	207.00		Cash		
				11/20/2018	Merchandise	20.00		20.00	0.00	227.00	TShirt - Small	Cash	Dani Ager	Adv Jazz - Wed - 7pm
			R	11/2/2018	Payment	-188.86		-188.86	0.00	207.00		Cash		

2. Click the **Receipt** button in the *Edit Transaction* window.

Edit Transaction

Save Changes

Family/Account **Ager**
2016 Hummingbird Cresent
Huntersville, NC 28078
Balance 207.00 Hm. Phone (704) 374-2415

Location*

Transaction Date

Type Sub-type

This payment has been applied to fees. Amount cannot be changed.
To view related fees, click the link at the bottom of this window.

Amount

Refund Amt

Payment Method Check #

Note

Credit Card Last4

Date Paid (blank=unpaid)

Class Category1 Session

Student:

Class/Event

UserID HCenter

3. In the *Receipt* window, select either the **Print** or the **Email** button to generate the receipt. When emailing, you will be given the option to select which contact in the Family record will receive the email. As well, you'll be able to add an additional email recipient and edit the email subject if desired (the default email subject is "Receipt").

Receipt

Please choose Recipients

Send	Name	Type	Email(s)
<input checked="" type="checkbox"/>	Holly Ager	Contact	hollyager41@gmail.com
<input type="checkbox"/>	Victor Ager	Contact	vicager@email.com
<input checked="" type="checkbox"/>	Add additional email address		
	<input type="text" value="yourorganizationsemail@email.com"/>		
<input checked="" type="checkbox"/>	Edit the Email Subject		
	<input type="text" value="Here's the receipt you requested!"/>		

Email Receipt

Cancel