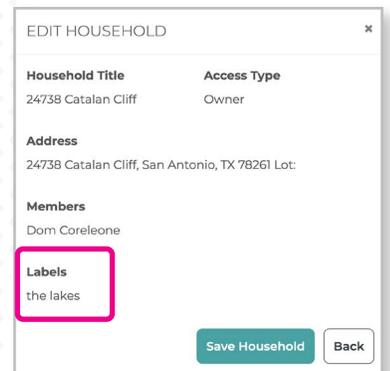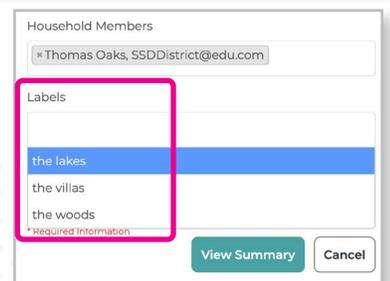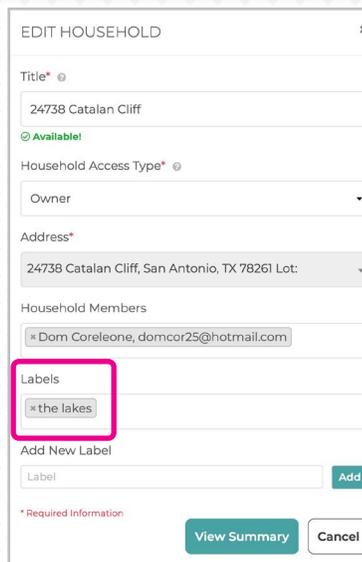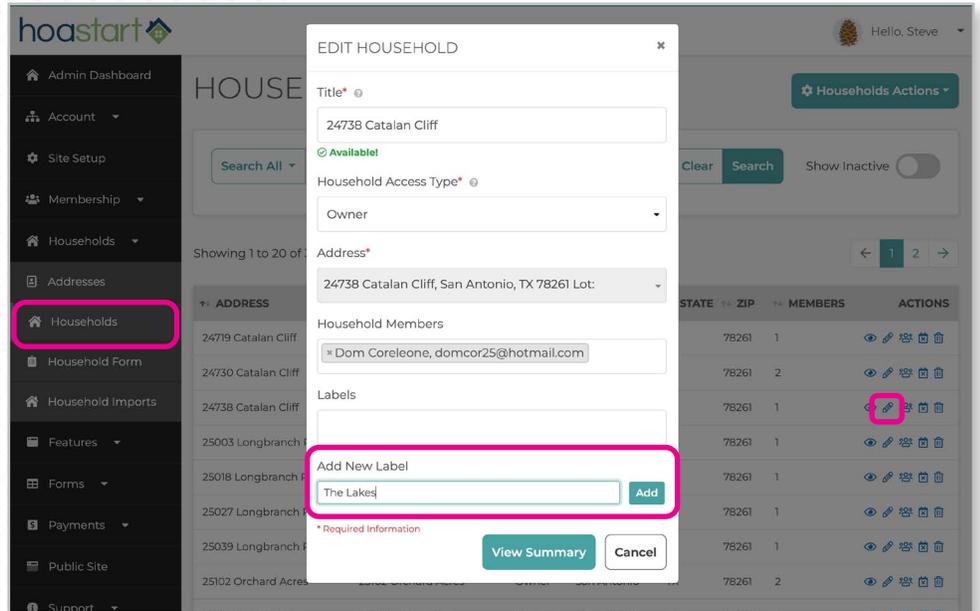# USING HOUSEHOLD LABELS

Household Labels enable Admins to send unique dues to an individual household or specific groups of households. This is extremely helpful if your community includes individual subdivisions with different dues rates, or if a new family moves in mid-year and their household only needs to be invoiced for a unique partial payment amount.

To create and assign labels, click on the overall "Households" tab to open it and the "Households" tab to reach the page. Apply labels when you create a new Household or by edit an existing one. Once you open either the "Add New Household" or "Edit Household" window, the process of adding a label is the same. In our example, we're editing an existing Household.

In the Actions column, click on the "Edit" icon (pencil) to open the Edit Household window. In the "Add New Label" field, give your label a name and click on the "Add" button. Once you add the label, you will see it listed in the "Labels" field. If the label already has been applied to another household, you can click in the "Labels" box and select it from a dropdown list. You can apply more than one label to each Household.

Once you have added a label, click on the "View Summary" button to review and verify that the appropriate label(s) have been added before you click on the "Save Household" button to save your changes.

USING HOUSEHOLD LABELS – CONTINUED

Once you apply labels to Households, it's easy to search Households for them. At the top of the Households summary page, enter your label name into the search field. From the search bar dropdown menu, select "Search Label" and click on the "Search" button.

As an Admin, you also can add or remove labels quickly from filtered Households searches so you can change multiple Household records at the same time. From the "Households Action" dropdown menu, select "Add Label to Filtered Households" or "Remove Label from Filtered Households." When you add labels, you can choose from existing labels, or select "New Label" from the bottom of the dropdown menu list to create and apply a new label.

After you have assigned the label to the appropriate Households, use the Dues and Fees feature to create a new dues item. From the dues "Add" screen, you can create a Household dues item and specify the relevant tag to use.

Check the "Invoice Households (One Payment Per Address)" box to reveal the option to filter by household labels. The "Select Applicable Household Labels" dropdown menu shows you the full list of currently assigned labels. You can select more than one label to filter your dues.

If you have additional questions about using Household Labels, please visit the Support Desk through your Admin Dashboard and open a support ticket.

HOUSEHOLDS ⓘ

Search Label ▾ | lakes | Clear | Search | Show Inactive

⚙ Households Actions ▾

⚙ Households Actions ▾
- 🖊 Edit Types
- ⬇ Download Households
- ⬇ Download Household Members
- ＋ New Household
- 👥 Add Label to Filtered Households
- 👥 Remove Label from Filtered Households

ADD LABEL TO HOUSEHOLDS ✕

Please Select The Label You Want To Add Below:

✓ Select
the lakes
New Label

Add | Cancel

ADD ✕

Dues Name* ⓘ | Amount* ⓘ
The Lakes Annual Due | 500.00

☐ Enable Late Fees ⓘ
☐ Enable Partial Payments ⓘ
☐ Enable Service Fee ⓘ

Frequency* ⓘ | Based On* ⓘ
Annually | Preset Date

Month Due* ⓘ | Date Due* ⓘ | Year Due* ⓘ
December | Last | 2022

End* ⓘ
None

You cannot create an invoice with a due date in the past. If you enter a past date, the system will generate a future due date for the invoice based on the other options you select.

Terms* ⓘ
Net 30

☐ Invoice All Members ⓘ
☐ Invoice Individual Members ⓘ
☑ Invoice Households (One Payment Per Address) ⓘ

Select Applicable Household Labels
the lakes

☑ Activate Due ⓘ
☐ Required for Member Access ⓘ

Calculate Invoice Schedule

* Required Information

Save | Cancel

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