Billing Templates

Rediker Software is pleased to announce the addition of our new Billing Templates feature. With Billing Templates, you can create a complete invoice, including multiple charges, debits, payments, credits and notes, to be entered for students in one easy step. Templates may be entered on an individual student basis or batch entered for many students at once.

Billing Templates eliminate the need for multiple batch entries for students on separate billing plans. For example, you could set up a template for students paying quarterly tuition installments. The plan would include 4 tuition charges spread out over the year, as well as any one-time fees or charges. This template would be batch entered to all students on the quarterly tuition plan at the beginning of the school year. If a new student arrives after the beginning of the school year, add the template to his or her Invoices screen to quickly enter all of the items on his or her billing plan.

Additional Benefits:

- Create a template for each of your billing plans (i.e. standard tuition, quarterly tuition, discounted tuition plans and more). The template can include numerous Billing Codes as well as Debit, Credit and Payment codes and up to 7 notes. Whenever a new student is enrolled select the template for his or her billing plan and enter it in one step.

- Create additional templates for students on specific meal plans, for boarding students, for students taking sports and other activities, and more…

- Create templates using an existing invoice. From the Invoices screen, call up a student and select the invoice with the items you wish to include on the new template. From the Viewing Invoices screen, click SAVE TEMPLATE

- Templates can be copied from existing templates so that you do not have to create new templates from scratch.

- Billing Templates can be linked so that when one template is entered for a student, the linked template is automatically entered at the same time. Templates are linked

consecutively allowing you to enter each invoice for a multiple-invoice billing plan all at once. For example, you can create 10 separate invoices for a 10 payment tuition plan where the first invoice includes the 1st of 10 tuition payments plus any one-time fees.   The "1st of 10 tuition" template would be linked to "2nd of 10 tuition" template, while the "2nd of 10 tuition" template would be linked to the "3rd of 10" template and so on. When any of these linked templates is entered for a student, each *successive* linked template will automatically be entered as a new invoice. If a student is enrolled during the middle of the year, you can enter template "5th of 10" through 10th of 10 by simply adding the "5 of 10 tuition" template. Templates 1 through 4 will not be added.

- Customize the dates for each item included on the template. Each template can include current charges and future charges. To customize the templates for a future date, the item dates can be automatically advanced by one week, one month or one year. This means the same template can be used throughout the school year, and for future school years with the appropriate item dates.

- Templates can be entered on a student-by-student basis (using the Invoices program) or for groups of students based on a data base criteria (using the BATCH ENTRY).

- Create up to 120 customized billing templates for your school.

Create a Billing Template

Billing templates can be created from either the Batch Entry or Invoices screens.

To create a new template from the Batch Entry Specification screen:

Click the   Template [F7]   button. A screen similar to the Report Writer report selection screen will appear. To create a new template from scratch, choose any unused template number and click the   Select   button. You can also copy an existing template, modify it, and save it under a new template number. To copy a template click the

Copy   button. To delete a template, click   Delete

The View/Edit Invoice Template screen will appear allowing you to enter the desired Billing, Debit, Payment and Credit codes as well as up to 7 notes (below). The functionality of the View/Edit Invoice Template screen is identical to the Viewing

Invoice screen used to enter invoices for individual students. To add an item to the invoice template highlight the appropriate row: B (Billing Code), D (Debit Code), P (Payment Code), C (Credit Code) or N (Note) and click **F2: ADD**. Click **F10: ACCEPT** to name and save the template.

View / Edit Invoice Template: Quarterly Tuition #1/Sibling Discount					
CREATING TEMPLATE #: 1				**LINK** NOT SELECTED	...
T	**DATE**	**DUE DATE**	**CODE**	**DESCRIPTION**	**AMOUNT**
B	**07-08-2002**	**07-28-2002**	**T4**	**Quarterly Tuition Charge**	**12000.00**
B	07-08-2002	07-28-2002	FEE	Fee Charges	600.00
B	07-08-2002	07-28-2002	L	Lunch	555.00
D					
P					
C	07-08-2002		C1	Multi-student discount	-1200.00
N					

ESC	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
EXIT		ADD	EDIT	LINK			CHANGE DATE	DEL		SAVE

To create a new template using an existing invoice:

From the Invoices program, call up a student with the invoice you wish to use to create the new template. Highlight the Invoice and press enter to open the Viewing Invoices screen. Click the SAVE AS TEMPLATE button and you will be prompted to select a template number and enter a name for the new template.

Linking Templates:

Template Links automate the entry of several invoices at once. Using the Batch Entry program, you can link any template to another template of a higher number. When templates are linked the program will automatically enter the linked template as well as the original template, as separate invoices. If the linked template is also linked to another template, all three will be entered with the original. Templates are linked to one another

in the order in which they should be entered for students. For example, for a Quarterly Tuition plan, you would link Template #1: "Quarterly Tuition #1/Sibling Discount" to Template #2: "Quarterly Tuition 2/Sibling Discount." Template # 2 would be linked to "Quarterly Tuition #3/Sibling Discount," and Template #3 would be linked to "Quarterly Tuition #4/Sibling Discount." When you enter Template #1 for a student, Templates #2-#4 will automatically be entered as well. If a student on this plan enrolls after the first quarterly billing period, enter template #2 and all subsequent linked templates will automatically be entered.

To link a template, from the View/Edit Invoice Template Screen click or press **F4: LINK** or click the Browse button in the Link Dialog box (in the upper right corner of the screen).

The Select Template screen will appear prompting you to select the desired report for the link.

How to Enter Billing Templates

A Billing template can be batch entered, or entered for one student at a time. Typically the batch entry of templates will be used at the beginning of the school year to set up the billing plans for all students. For students who enroll after the start of the school year, templates can be entered from the INVOICES program.

Batch Entry:

To Batch Enter a Billing Template, change Batch Entry Specification #1) ADD TO WHICH INVOICES? to *Batch Enter From Template*. Use Specification #2) WHICH ACTIVE TEMPLATE? to select the desired template. If the selected template is linked to another template, each template will be entered as a new invoice. **Note: Because all Invoice Codes are included in the template, the remaining specifications on Page 1 will be unavailable.**

Templates may be batch entered for All Students, students in a particular grade level or range of grade levels, or students meeting your data base field criteria.

For Individual Students:

Navigate to the Invoices program. From the Viewing All Invoices screen, call up the desired student and click **ADD TEMPLATE: F2**. Select the appropriate template from the list of all available templates. The selected template will be added as a new invoice. If the selected template is linked, each consecutively linked template will be added at the same time.