Adding Funds

Tuition Funds are ***separate*** *from CN Offering and Pledges. Funds designate where payments are going to be recorded.*

1. Click on the blue **+** to add a fund
2. Enter **70-75-01** as the Fund #
3. Enter **Tuition** as the Description
4. Click **Save**
5. Additional Funds to add:
    ii. 70-75-02 for Sacramental Prep
    iii. 500-503-02 for Book Fees
    iv. 500-503-01 for Registration Fees

Invoice Items

Invoice Items are used to bill customers for specific selections. These are going to be the individual line items on our Invoices.

Item 1:
1. Description: **1 Student In-Parish Tuition**
2. Unit Price: **50.00**
3. Fund: **Tuition**

Item 2:
1. Description: **Registration Fee**
2. Unit Price: **5.00**
3. Fund: **Registration Fees**

Item 3:
1. Description: **Book Fee**
2. Unit Price: **15.00**
3. Fund: **Book Fees**

Item 4:
1. Description: **First Communion Fee**
2. Unit Price: **15.00**
3. Fund: **Sacramental Prep**

Item 5:
1. Description: **Catechist Discount**
2. Unit Price: **-10.00**
3. Fund: **Tuition**

Customers

Customers are the families you have specified as available for tuition.

1. Click on the blue **+** to add a customer
2. Set filters Family Group = **All Groups** Workgroup = **All Groups**
3. Search for Last name of **Balk** family
4. Select **Michael and Sharon**
5. **Add as new Customer(s)**
6. Repeat process for **Jason and Tracey Abler**

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Templates

*A template is a default collection of invoice items that can be applied to multiple customers when selected from an invoice. Once you create a template, you can later make modifications to it. Templates are a good starting point if your customers are going to be billed similarly. Templates are **not** required.*

1. Click on the blue **+** to add a template
2. Enter **Religious Ed – 1 Student In Parish** as the Template Name

Add invoice items to the template

1. Click **Add New Item**
2. Choose **1 Student (in Parish)** from the drop down menu
3. Add **Registration Fee** and **Book Fee** to the template as well.

Adding Payment Options to Templates

You can choose to add a Payment Plan to a template. This is helpful if you plan on having a billing cycle applied across the board to all Customers that use that template.

1. Check Box to **Include payment plan on invoice**
2. Enter **9/1/(Current Year)** as the First Payment Date
3. Enter **5/1/(Next Year)** as the Due On Date
4. Change the Payment Frequency to **Monthly**
5. You should see **8** payments show up

Invoices

Invoices are used when you are ready to create unique billings for customers. They are tailored to each customer's specific situation, and can be modified as needed.

Invoice #1 exercise

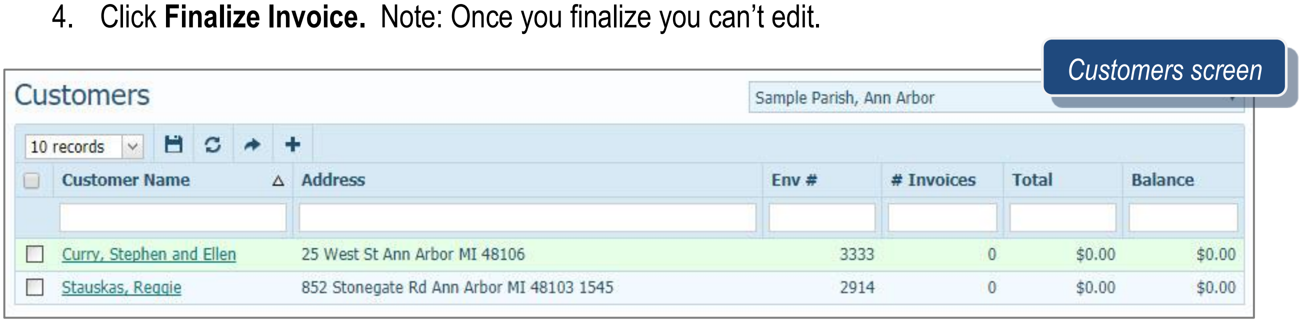
1. Click the **Invoices** button to the left of Customers
2. Click on the blue **+** to add an Invoice
3. Choose **Religious Ed** as the Template
4. Select **Michael and Sharon Balk** as the Customer
5. Enter a Description of **Religious Ed 2018**
6. Enter ***Current date*** as the Date
7. Enter a **Due on** date

Adding Additional Items to Invoices

1. Click **Add New Item**
2. Add **First Communion Fee** to the invoice

Adding Student to Invoices

1. Check the box for **Included students on invoice**
2. Check the box next to **Hamilton**
3. select the class from the drop down menu on the right
4. Click **Finalize Invoice.** Note: Once you finalize you can't edit.

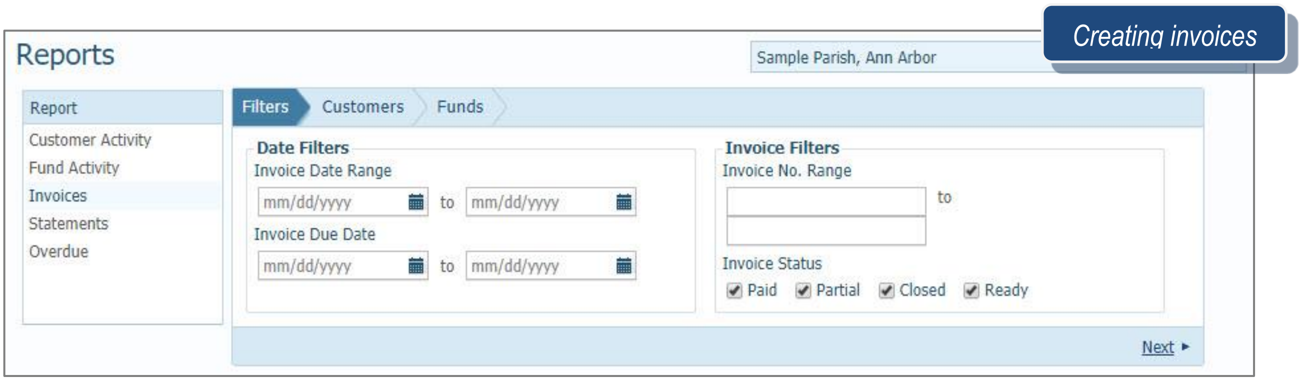


Invoice #2 exercise

1. Click on the blue **+** to add an Invoice
2. Choose **Religious Ed** as the Template
3. Select **Jason and Tracey Abler** as the Customer
4. Enter a Description of **Religious Ed 2018**
5. Enter **Current date** as date
6. Leave **Due on** date blank

Adding Additional Item

1. Change **1 Student In-Parish Tuition** to **2 Student In-Parish Tuition**
2. Change the quantity for **Book Fee** from 1 to 2
3. Additional Options



Payment Options

1. Remove payment plan (un-check box)
2. Click **Save as Draft**

Payments exercise

1. Before you can record a payment on an invoice, the invoice must be finalized
2. Apply a partial payment to the Hamilton Invoice and a full payment to the Abler invoice
    1. You will need to finalize the Abler invoice before it will let you apply the payment

1ST Payment

Applying a Partial Payment to the Balk Invoice

1. Open the Invoice for the Balk's.
2. Check the check box next to **1 Student In-Parish.**
3. Enter **$50.00** for the amount.
4. **Click Save at the bottom.**

2nd Payment

Applying a Full Payment to the Ablers (first you'll need to finalize their invoice)

1. Click on their Invoice for the Abler Family
2. Click on **Edit Invoice**
3. Click on **Finalize Invoice**
    1. Click on **Apply a Payment**
    2. At the top in the **Payment Amount** field enter the full amount due.
    3. Click **Apply**

QUESTIONS FROM CLASS

1. Why can't I print an invoice that I already created?
2. Do I need to use a template when creating an invoice?
3. How can I report on tuition payments made per fund?
4. Where do I change the remittance name, address and 'payable to' information?
5. What's the difference between an invoice Credit and an invoice Writeoff?
6. What format do I need to use when creating my Funds?

TIPS & TRICKS

- Remember that the Tuition module can be used for anything you charge for…not just traditional tuition!
- Create as many Invoice Items as you may need over time. You can never have too many to pick from
- Use IQ to isolate a list of school families. Create a workgroup from the results and then import that workgroup easily as Customers
- Statements can be run according to your schedule, at any time you need to produce follow-up to invoices

ANSWER KEY

1. If your invoice is not Finalized, it cannot be printed. Navigate into the Invoices menu and make sure it is complete.
2. No. 3. Generate the Fund Activity report to total by each individual fund 4. Tuition → Settings
5. Credit reduces the amount the customer has to pay. Writeoff helps to resolve a billing error or overpayment/underpayment
6. A Fund # can be anything you'd like it to be, but the field only accepts numbers and dashes.

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