Invoice for a Daily Contract

If this is your first time invoicing, feel free to contact RegWerks at 888-847-9470 or via email at support@regwerks.zendesk.com for assistance with the invoicing process.

1. Before beginning the invoicing process, ensure that **Pre-Pay** is turned on within the class' Contract; doing so allows you to set Due Dates when billing.

2. Select **Class** under the **Main** menu, and then double-click into the class for which invoices need to be generated.

- Verify that all necessary adjustments have been completed and suspensions have been made.

3. Click the **Calculate Charges** button ($) at the bottom of the window, and the **Calculate Charges** window will open.

[297663] Calculate Charges

Generate fees from 5/16/2020 using the dates selected below.

Due Date 🗓 10/19/2020

		Oct 2020						**Selected Dates**
S	**M**	**T**	**W**	**T**	**F**	**S**		10/12/2020
27	28	29	30	1	2	3		10/13/2020
4	5	6	7	8	9	10		10/14/2020
11	12	13	14	15	16	17		10/15/2020
18	19	20	21	22	23	24		10/16/2020
25	26	27	28	29	30	31		10/17/2020
1	2	3	4	5	6	7		10/18/2020

Suspended Registrations

Student	Segment	Reason	Start	End	Amount
Clark, Capriese	[Standard]AM 2 Days a Week	Suspension	08/05/2019	06/25/2021	5
Clark, Capriese	[Standard]PM 2 Days a Week	Suspension	08/05/2019	06/25/2021	5

✖ Cancel   💾 OK

4. The **Start Date** will auto-fill. Define the invoicing time frame by holding the **Ctrl key** (Windows) or the **Command key** (Mac) and by then clicking on each day which is included in this billing cycle.

   - **NOTE**: If billing on a weekly cycle, it is recommended that the invoicing time frame ends on the Sunday of the week in which fees are being billed.

   - Once all days are selected in the calendar, enter in the invoice **Due Date** to select the day on which payments will be due.

5. If there are no suspended registrations listed in the **Suspended Registrations** section, proceed to the next step.

   - If there are suspensions with partial amounts due for the invoice period, please note that the system will not automatically calculate these partial charges. Partial amounts due must be manually entered in the **Amount** column, as noted above by the red arrow.

6. After verifying that the **Selected Days** and **Due Date** are correct, click **OK**. A **Charges Report** will open as an Excel file for final review. This report displays only calculated charges. It does not include unpaid previous balances. Save this report for future reference, if desired; otherwise, close out of the Excel file once a final review of charges is complete.

7. Back in the RegWerks system, the **Class** window will still be open. Click the **Send Invoices** button at the bottom of the **Class** window.

- Select **Preview**, when prompted to answer the question, "Do you want to preview the invoices or send them?" Invoices may be reviewed or printed at this point. Close the browser tab when finished.

8. When the **Invoices** window opens, click **Preview** to review or print the invoices, which will open a new tab in your browser and allow you to verify that the invoices look correct.

- If the invoices appear to be *incorrect*:

  o Close out of the browser's **Preview** tab and undo the invoices using the **Undo Charges** button. Select **Yes** when prompted, "Are you sure you want to undo the fee generation?"

  o **Save** out of the class after undoing the charges, then double-click back into it.

  o Make all necessary adjustments to correct errors on the invoices.

  o After making all required changes, redo the steps above starting at **Step 2.**

- If the invoices look *correct*:
  o Close out of the browser's **Preview** tab.
  o Click the **Send Invoices** button, then select **Send**. Once **Send** is selected, a processing window will pop up for a moment; when it disappears, **Save** out of the Class.

9. Invoicing is now complete.