




Invoice for a Pro-Rated Flat Fee Contract

In order to select a due date when invoicing, first turn the prepay option on within your class' contract. When invoicing is completed, turn the prepay option off if you do not want parents to pay for an invoice period's worth of class in advance (typically a week or month depending on your contract's setup).

You may choose to Pro-Rate billing if you wish to bill partially for your invoice period. When you select the Pro-Rated button, you will need to set the "Days in monthly rate" along with the "Number of days in pro-rated period".

For assistance with invoicing, call the RegWerks support line at 888-847-9470 or email support@regwerks.zendesk.com.

1. Navigate to **Class** under the **Main** menu, and then double-click into the Class for which invoices will be generated.
2. Verify that all necessary adjustments have been completed and suspensions have been made prior to generating invoices.
3. Click the **Calculate Charges** button () at the bottom of the window, which will open the **Calculate Charges** window.

[297680] Calculate Charges

Generate fees from 1/1/2021 to the date selected below.

Charge To Date Due Date

Full Billing Pro-Rated

Days in monthly rate

Number of days in pro-rated period

Suspended Registrations

Student	Segment	Reason	Start	End	Amount

- The start date will auto-fill. Select the end date for the billing period in the **Charge to Date** field.
 - **NOTE:** For weekly billing, It is recommended that the invoicing time frame ends on the Sunday of the week in which fees are being billed.
- Select the **Pro-Rated** option.
- In the **Days in monthly rate** field, enter the number of class days within a standard billing cycle (for instance, 5 for a weekly class and 30 for a monthly class).
- In the **Number of days in pro-rated period** field, enter the number of actual class days within this current billing cycle you wish to invoice for.
- Enter the invoice **Due Date** by selecting the day on which payments will be due.
 - **NOTE:** If late fees are attached to this contract, these fees will be assessed and applied to accounts once the due date has passed.
- 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.
- After verifying that everything has been entered accurately, click **OK**.

4. 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.
5. Back in the RegWerks system, the **Class** window will still be open. Click the **Send Invoices** button at the bottom of the **Class** window.

The screenshot shows the 'Class' window in the RegWerks system. The title bar reads '[297680] Class'. The main area contains several sections:

- Class Information:** Class Number (Weekly Child Care 2019-2020), Program (Child Care), Course (Weekly Child Care), Conf. Email (lizzy.moeller@revtrak.com), Status (Active), Enrolled (50), Waitlist (0).
- General Tab:** Account Code (K-5th Child Care), Manager (Lamb, Matthew), Publish Date (02/26/2019), Remove Date (01/01/2022), Reg. Begins, Reg. Ends, Publish Time, Remove Time, Begins Time, Ends Time. There are also checkboxes for 'Show On Web', 'Allow Waitlist Registrations', and 'Show On Year End Statement'.
- Pricing:** Radio buttons for 'Standard Pricing' and 'Contract Pricing'.
- Contract:** Flat Fee.
- Limits:** Go Limit (0), Reg. Limit (50).

 At the bottom, there is a toolbar with icons for Reports, a printer, a dollar sign, a refresh button, a mail icon (Send Invoices), and a document icon. A red arrow points to the mail icon.

6. 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.

- If the invoices appear to be **incorrect**:
 - 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”



- **Save** out of the class after undoing the charges, then double-click back into it.
- Make all necessary adjustments to correct errors on the invoices.
- After making all required changes, redo the steps above starting at **Step 2**.
- If the invoices look **correct**:
 - Close out of the browser’s **Preview** tab.
 - 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.

7. Invoicing is now complete.