
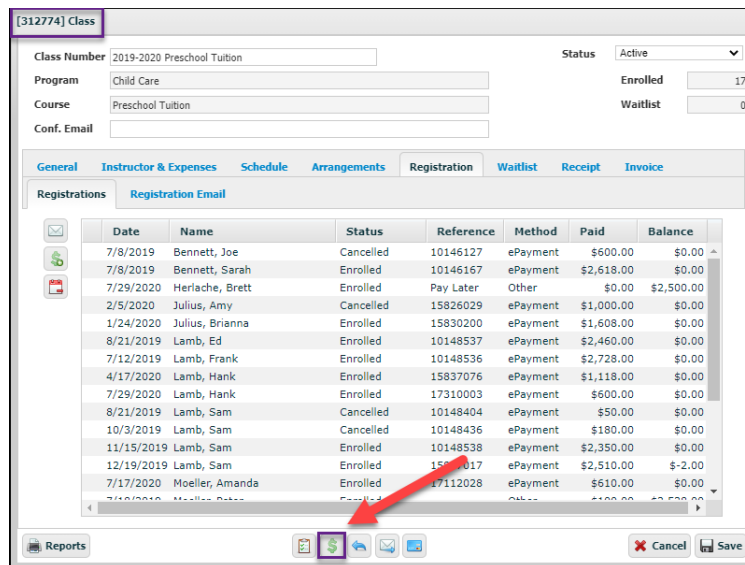




Invoice for a Flat Fee Contract

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 will allow 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.
3. Verify that all necessary adjustments have been completed and suspensions have been made prior to generating invoices.
4. Click the **Calculate Charges** button () at the bottom of the window, and the **Calculate Charges** window will open.



[312774] Class

Class Number: 2019-2020 Preschool Tuition Status: Active

Program: Child Care Enrolled: 17





Course: Preschool Tuition Waitlist: 0

Conf. Email:

General Instructor & Expenses Schedule Arrangements Registration Waitlist Receipt Invoice

Registrations Registration Email

Date	Name	Status	Reference	Method	Paid	Balance
7/8/2019	Bennett, Joe	Cancelled	10146127	ePayment	\$600.00	\$0.00
7/8/2019	Bennett, Sarah	Enrolled	10146167	ePayment	\$2,618.00	\$0.00
7/29/2020	Herlache, Brett	Enrolled	Pay Later	Other	\$0.00	\$2,500.00
2/5/2020	Julius, Amy	Cancelled	15826029	ePayment	\$1,000.00	\$0.00
1/24/2020	Julius, Brianna	Enrolled	15830200	ePayment	\$1,608.00	\$0.00
8/21/2019	Lamb, Ed	Enrolled	10148537	ePayment	\$2,460.00	\$0.00
7/12/2019	Lamb, Frank	Enrolled	10148536	ePayment	\$2,728.00	\$0.00
4/17/2020	Lamb, Hank	Enrolled	15837076	ePayment	\$1,118.00	\$0.00
7/29/2020	Lamb, Hank	Enrolled	17310003	ePayment	\$600.00	\$0.00
8/21/2019	Lamb, Sam	Cancelled	10148404	ePayment	\$50.00	\$0.00
10/3/2019	Lamb, Sam	Cancelled	10148436	ePayment	\$180.00	\$0.00
11/15/2019	Lamb, Sam	Enrolled	10148538	ePayment	\$2,350.00	\$0.00
12/19/2019	Lamb, Sam	Enrolled	15837017	ePayment	\$2,510.00	\$-2.00
7/17/2020	Moeller, Amanda	Enrolled	17112028	ePayment	\$610.00	\$0.00
7/16/2020	Moeller, Peter	Cancelled		Other	\$100.00	\$2,500.00

Reports     Cancel Save

5. In the **Calculate Charges** window, the start date will auto-populate.

[312774] Calculate Charges

Generate fees from 6/1/2020 to the date selected below.

Charge To Date 07/05/2020 Due Date 07/12/2020

☒ Full Billing ☐ Pro-Rated

Days in monthly rate 30

Number of days in pro-rated period 0

Suspended Registrations

Student	Segment	Reason	Start	End	Amount
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Cancel OK

- Select the end date for the billing period in the **Charge To Date** field.
 - When billing the class for the first time prior to the first day of class, set the **Charge To Date** to the first day of class.
 - **NOTE:** For weekly billing cycles, it is recommended that the invoicing time frame ends on the Sunday of the week in which fees are being billed.
- Select the day on which payments will be due in the **Due Date** field.
- The system automatically chooses **Full Billing**. Complete **Pro-Rated** information if necessary.
- If there is a late fee attached to this contract, late fees will be automatically assessed and applied to accounts once the due date has passed.
- Suspended Registrations:
 - If there are suspensions with partial amounts due for the invoice period, the system will not automatically calculate these partial charges. Partial amounts due must be manually entered in the **Amount** column.
 - For classes in which there are Suspended Registrations, review the Suspended Registrations field to confirm that all such registrations are listed.
 - If there are no suspended registrations listed in the Suspended Registrations section, proceed to the next step.
- After verifying that everything is correct, Select **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.

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

[312774] Class

Class Number: 2019-2020 Preschool Tuition Status: Active

Program: Child Care Enrolled: 17

Course: Preschool Tuition Waitlist: 0

Conf. Email:

General Instructor & Expenses Schedule Arrangements **Registration** Waitlist Receipt Invoice

Registrations Registration Email

Date	Name	Status	Reference	Method	Paid	Balance
7/8/2019	Bennett, Joe	Cancelled	10146127	ePayment	\$600.00	\$0.00
7/8/2019	Bennett, Sarah	Enrolled	10146167	ePayment	\$2,618.00	\$0.00
7/29/2020	Herlache, Brett	Enrolled	Pay Later	Other	\$0.00	\$2,500.00
2/5/2020	Julius, Amy	Cancelled	15826029	ePayment	\$1,000.00	\$0.00
1/24/2020	Julius, Brianna	Enrolled	15830200	ePayment	\$1,608.00	\$0.00
8/21/2019	Lamb, Ed	Enrolled	10148537	ePayment	\$2,460.00	\$0.00
7/12/2019	Lamb, Frank	Enrolled	10148536	ePayment	\$2,728.00	\$0.00
4/17/2020	Lamb, Hank	Enrolled	15837076	ePayment	\$1,118.00	\$0.00
7/29/2020	Lamb, Hank	Enrolled	17310003	ePayment	\$600.00	\$0.00
8/21/2019	Lamb, Sam	Cancelled	10148404	ePayment	\$50.00	\$0.00
10/3/2019	Lamb, Sam	Cancelled	10148436	ePayment	\$180.00	\$0.00
11/15/2019	Lamb, Sam	Enrolled	10148538	ePayment	\$2,350.00	\$0.00
12/19/2019	Lamb, Sam	Enrolled	15837017	ePayment	\$2,510.00	\$-2.00
7/17/2020	Moeller, Amanda	Enrolled	17112028	ePayment	\$610.00	\$0.00

Reports Invoices have not been sent [Icons: Print, Refresh, Send Invoices, Mail, Calendar] Cancel Save

- 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.
- If the invoices appear to be **incorrect** or otherwise require changes:
 - Close out of the browser’s **Preview** tab.
 - Undo the invoices using the **Undo Charges** button.

Reports Invoices have not been sent [Icons: Print, Refresh, **Undo Charges**, Mail, Calendar] Cancel Save

- 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.