Billing Management Checklist

Are you ready to send out your contributions?

☐ Billing Run

Does your Billing Run have the instalment options you'd like to offer?
Is each Billing Schedule assigned to the correct run?

☐ Billing Schedules

Does each Billing Schedule have the correct payment items at the right costs?
Does each Billing Schedule have the correct students enrolled?
Have you utilised Subject Schedules?

☐ Items

Have your items/item templates been assigned to the correct GL Code?
Have you set your item template dates correctly? eg. if the item is used only in 2022 - use 2022 dates, or if you'd like to use the template next year, leave the dates blank.

☐ Test Student/Parent

Post one Billing Schedule, with one enrolment that you can test with - Impersonate the parent and confirm you're happy with the setup/display.
Then, add your other enrolments and post other schedules as needed.

☐ Publish to Community

Post your Billing Schedules
Send out an email/Newsfeed/Bulk SMS to alert parents that they're able to access their contributions.

Handy Tips & Tricks

- ✔ Utilise the GL Code Report & Billing Items Report to simply distinguish your incoming funds.
- ✔ As Billing shows in Action Centre alongside Events, each time a parent accesses an Event, they'll be able to see their School Fees.
- ✔ Use your CompassPay reports to narrow further into each transaction and transfer.
- ✔ You're able to set up manual fee instalments via the Payment Plans module on a parent-by-parent basis - for specific requirements.
- ✔ Encourage parents to access their 'My Payments' page to view their history.

Contact our training team to double check your setup with a free online training session.

training@compass.education

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