Lesson #9.1 - Post Tuition Fees for Classes with By Class Fee Billing Method

Multi-Class Discounts

When posting tuition fees for classes with the **Billing Method - By Class Fee**, a discount can be automatically calculated and applied to tuition fees based on the number of classes taken.

Multi-class discounts can be calculated either by student or by family:

Count classes by student	Jackrabbit counts each student's classes separately and calculates the discounts.
Count classes by family	Jackrabbit adds the tuition for the classes taken by all students in the family and calculates the discount.

Define and Add Discount Rules

The first step in applying multi-class discounts is to define them using Tuition Discount Rules. The Discount Rules are then added to each *Class* record, on the *Summary* tab.

Step 1 **Define your discounts by adding Tuition Discount Rules**	

Step 2 **Assign Tuition Discount Rules to Classes**	

Count Classes by Student or Family for the Multi-Class Discount (By Class Fee)

When calculating **Multi-Class** discounts during tuition billing for classes with the Billing Method **By Class Fee**, you have the option of using student level discounting or family level discounting.

- At the student level, Jackrabbit counts each student's classes separately and applies the discounts.
- At the family level, Jackrabbit adds all the class tuition, for all students, and applies the discount to the total.

This setting to change between student and family counting is located on the *Discount Rules for Classes Billed by Tuition Fee* page accessed from **Manage Your Discount Rules** under the *Gear (icon) > Settings > Tuition & Discounting*.

Example

Multi-Student Discounts

Multiple student discounts allow you to offer a reduction in tuition fees for families with multiple

students taking classes with you. They can be used with classes using either **Tuition Billing Method** of *By Class Fee* or *By Total Hours*.

Multiple Student Discounts - Classes Billed By Class Fee

For classes that have a Billing Method of *By Class Fee*, a multi-student discount is defined using a **Tuition Discount Rule**.

The Discount Rule can be created as only a multi-student discount, or it can be added in combination with a multi-class discount using a combination rule type.

The first step in applying multi-student discounts to classes billed By Class Fee is to define them using Tuition Discount Rules. The Discount Rules are then added to each *Class* record, on the *Summary* tab.

Discount Rules for Classes Billed By Class Fee

Do you want to offer a discount incentive to students who take more than one class or a discount to families with more than one student enrolled at the same time? Jackrabbit makes it simple to accommodate these scenarios.

Tuition Discount Rules define **multi-class** and **multi-student** discounts (or a combination of both!) for classes that are billed **By Class Fee.** These rules are assigned to classes on the *Summary* tab of the *Class* record. Once a rule is assigned to a class, the class will use that rule's discounts when posting your tuition fees based on your **Tuition Fee Settings**.

All classes are automatically assigned a Discount Rule of *No Discounts* on the *Summary* tab of the *Class* record. Once you have created your Tuition Discount Rules in Tuition Settings, found under the *Gear (icon) > Settings > Tuition & Discounting > Manage Your Discount Rules > Manage Rules*, they are assigned to each class that you bill By Class Fee in the *Class* record on the *Summary* tab.

Step 1

Add a Discount Rule

Tuition Settings

Discount Rules for Classes Billed by Tuition Fee

+ Add New Rule ①

CURRENT RULES

View 1 - 6 of 6   🖶 Print

	Rule	Type	Class Status	Family Status	Scheduled Task Status	Preview	Edit	Copy	Delete
1	No Discounts		Not Assigned	Not Assigned	Not Assigned				
2	$5 Off Classes | 10% Off Students	Multi-Class	Not Assigned	Not Assigned	Not Assigned	👁	✏	📋	🗑
3	2021 Discounts	Combo	Not Assigned	Not Assigned	Not Assigned	👁	✏	📋	🗑
4	2022 Discounts	Combo	Assigned	Not Assigned	Assigned	👁	✏	📋	🗑
5	Summer Discounts	Combo	Assigned	Not Assigned	Assigned	👁	✏	📋	🗑

Note: The Trash Can icon is visible when no discounts are applied to classes and families or are part of a scheduled automated task. When you remove the applied discounts, the columns will change to *Not Assigned*, and the Current Rule can be deleted.

Class: Advanced Tumbling - T/Th - 6:00

SAVE CHANGES **DELETE**

| Class Roll | Enroll Student | Email/Text Class | Enter Absences | Absence/Attendance | Post Class T |

| Summary | Enroll List | Drop List | Absences | Makeups | Wait List | Instructors | Lesson |

Class Name [Advanced Tumbling - T/Th - 6:00] Statu

Location [E-Cheer ∨] Room [Gym - Floor 1 ∨]

Session [2022   ∨]

Class Start Date [1/1/2022 📅] End Date [12/31/2022 📅 ❓] Registration

Days Mon Tue Wed Thu Fri Sat Sun
☐ ☑ ☐ ☑ ☐ ☐ ☐

Start Time [06:00pm] End Time [06:45pm] Duration [:45 ∨] ❓

☑ Has a Registration Fee ❓

Tuition Fee [145.00] Per-Day [No ∨]

Tuition Billing Method [By Class Fee ∨] ☐ Exclude from Multi-Class Discount ❓

Tuition Billing Cycle [Monthly   ∨]

Tuition Discount Rule [2022 Discounts   ∨] **2** *Edit Rule*

☑ Prorate Tuition

Step 2

Assign Discount Rule to Classes

Each class can only have one Tuition Discount Rule; however, you can assign different rules to different sets of classes. For example, you may offer recreation classes that are eligible for discounting (using a Tuition Discount Rule that you create) while having Competitive Team classes that do not count towards discounting (using the *No Discounts* rule).

Use the Edit All Classes tool from the Classes menu to assign rules to multiple classes at once.

Family Discount Rules

Sometimes you don't want the Discount Rules for a class to be applied to a specific family. Perhaps you have some families who are Team or Competition, and their students' classes are discounted at a different rate than the rules assigned to them.

When you find that the assigned class Discount Rules aren't applicable to a particular family, create a Family Discount Rule and save it to the family's *Billing Info* tab. The Family Discount Rule will override all class-assigned rules for this family. Learn more about **Family Discount Rules**.

Create/Add a New Class Discount Rule

Discount Rules are created in Jackrabbit to assign three types of tuition discounts that are available:

- ⭐ **Multi-Class Discounts** - Tuition discounts are given based on the number of classes the students in a family are taking. These can be counted either for each student separately or for all of the students as a whole.
- ⭐ **Multi-Student Discounts** - Tuition discounts are given depending on the number of students enrolled in classes from the same family.
- ⭐ **Combination of Multi-Class and Multi-Student Discounts** - Combo discounts are a combination of Multi-Class and Multi-Family.

Note: *A class can only accept one rule at a time. To apply both a Multi-Class AND a Multi-Student discount, you have to select the combination discount rule.*

Create Discount Rules

Discount Rules are created in *Tuition Settings* from the *Gear* (icon) *> Settings > Tuition & Discounting > Manage Your Discount Rules* (section) *> Manage Rules* (button).

1. Click **Manage Rules** to open the rule builder.
2. Click **Add New Rule** to start building a Discount Rule.

Tuition Settings

← RETURN

Discount Rules for Classes Billed by Tuition Fee

Tuition Discount Rules define multi -class and/or multi-student discounts and are assigned to classes on the class summary page. Once a rule is assigned to a class, the class will use that rule's discounts in Post Tuition Fees, Online Registration, and Quick Registration.

There may be times when you don't want the family's enrolled class Discount Rules to apply. Perhaps you have some families who are 'team' or 'competition' families and all the student's enrolled classes get a different discount than the rules assigned to their classes. When you find that the assigned Class Discount Rules aren't applicable, create a Family Discount Rule and save it to the Family's Billing Info tab. The Family Discount Rule will over-ride all class assigned rules for this family.

To assign rules to many classes at once, use the Edit All Classes Tool.

+ Add New Rule

These columns indicate if a discount has been assigned to a class, family, or a scheduled automated task.

CURRENT RULES

View 1 - 6 of 6   🖨 Print

	Rule	Type	Class Status	Family Status	Scheduled Task Status	Preview	Edit	Copy	Delete	
1	No Discounts		Not Assigned	Not Assigned	Not Assigned					Manage your current rules in this section.
2	$5 Off Classes | 10% Off Students	Multi-Class	Not Assigned	Not Assigned	Not Assigned	⊙	✏	📋	🗑	
3	2021 Discounts	Combo	Not Assigned	Not Assigned	Not Assigned	⊙	✏	📋	🗑	
4	2022 Discounts	Combo	Assigned	Not Assigned	Assigned	⊙	✏	📋	🗑	
5	Summer Discounts	Combo	Assigned	Not Assigned	Assigned	⊙	✏	📋	🗑	

3. Enter a **Tuition Discount Rule Name** in the *Rule Details* section and **select the type**: multi-class, multi-student, or a combination of both.

4. Define how the discount is calculated in the *Calculating the discounts* section. See **Discount Rule Examples** below for an example of each discount rule.

Multi-Class Discount	Define **how the multi-class discounts should be applied:** ○ **Use the discount rate listed for each class** if you'd like Jackrabbit to apply the discount to each class individually using the discount listed for each class in the *Tuition Discount Method* (table). ○ **Add up classes and use the discount rate listed for the total # of classes** if you'd like Jackrabbit to add up the classes and use the discount associated with the total in the *Tuition Discount Method* table. Specify whether you want the discount to be **$ - Dollars** or **% - Percentage**. Define the discount amount or percent for each class in the **Tuition Fee Discount Method** table. *Note:* You can discount up to 20 classes. Use the **Add Discount** button to define the discounts beyond 10 classes. Select the **order you want to apply the discount** to tuition fees: ○ If you want the lowest tuition fee to get the highest discount, select **Highest tuition gets lowest discount.** ○ If you want the highest tuition fee to get the highest discount, select **Lowest tuition gets lowest discount.**

Multi-Student Discount	- Select **Use the discount rate listed for each student** if you'd like Jackrabbit to apply the discount to each student individually using the discount listed for each student in the *Tuition Discount Method* (table). - Select **Add up the students in the family and use the discount rate listed for the total** if you'd like Jackrabbit to add up the students in the family and use the discount associated with the total in the *Tuition Discount Method* table. Specify whether you want the discount to be **$ - Dollars** or **% - Percentage**. Define the discount amount or percent for each student in the **Tuition Fee Discount Method** table. *Note:* You can discount up to 6 students.
A combination of both	Define the **Discount Eligibility**: - Select **Give both discounts** if you'd like Jackrabbit to give both discounts whenever applicable. - Select **Give only multi-class discounts; only give multi-student discounts when multi-class doesn't apply** if you'd like Jackrabbit to first check for multi-class and apply if applicable. If no multi-class is applicable, Jackrabbit will apply multi-student if applicable. Specify **how the multi-class discounts are applied** and whether you want the discount to be **$ - Dollars** or **% - Percentage**. Complete the **Tuition Fee Discount Method** table and define the **order to apply the discount** (see above.) Determine **how the multi-student discounts are applied** and whether you want the discount to be **$ - Dollars** or **% - Percentage**. Complete the **Tuition Fee Discount Method** table and define the **order to apply the discount** (see above.) If your discount is based on a percentage, define **when the % multi-student discount should be applied**: - **Apply it to the Original Amount** to have the % applied to tuition fees before the multi-class discount. - **Apply it after the Multi-class discount has been deduced** to have the % applied to the adjusted total (original amount less multi-class discount).

5. Click **Preview Rule** to see the discount you are building in action! Enter a Tuition Fee to see an illustration based on the rule's discounts and the fee you have created.

Note: Because the same fee amount is used for each class tuition in this example, the highest/lowest settings are not reflected in the tuition fees discounting.

6. Click **Save Changes** when you are happy with the results of the rule you created, and you will be returned to the main page of the Discount Rule builder.

Now that you have created your Discount Rules, you will need to assign them to your classes. See **Assign Tuition Discount Rules to Classes**.

If you don't see the Manage Your Discount Rules option in your Tuition Settings, it may be that your account is currently only set to use the By Total Hours Billing Method. Discount Rules are only available when you bill your classes By Class Fee.

 Multi-Class Discount

 Multi-Student Discount

 Combination (Combo) Type Discount

Manage Current Tuition Discount Rules

You can manage your Tuition Discount Rules from the *Gear (menu) > Settings > Tuition & Discounting > Manage Your Discount Rules.* Click the **Manage Rules** button to open the *Discount Rules for Classes Billed by Tuition Fee* window.

From this screen, you are able to preview, edit, copy, or delete your current rules.

Preview

Click the **Eye** (icon) to see an example of how your tuition fee will be discounted according to the rule. The *Enter a Tuition Fee* field defaults to $100 but you can change that amount to the actual amount of your class tuition for the illustration.

Preview - Fall Rec Classes

Enter a Tuition Fee $ 100.00

This field defaults to $100 but you can change it to any amount.

Tuition Fees Discounting Example

Use the tabs to see the calculations when both Multi-Class and Multi-Student discounts are applied or when only one of them is applied.

| Both | Multi-Class | Multi-Student |

Your organization is set to count classes for multi-class discounting **By Student**

Combo Discount Rule

# of Students In Family		Class 1 $0	Class 2 $5	Class 3 $5	Class 4 $5	Class 5 $10	Class 6 $15
	Student 1 0%	100.00	95.00	95.00	95.00	90.00	85.00
	Student 2 5%	95.00	90.00	90.00	90.00	85.00	80.00
	Student 3 5%	95.00	90.00	90.00	90.00	85.00	80.00
	Student 4 10%	90.00	85.00	85.00	85.00	80.00	75.00
	Student 5 10%	90.00	85.00	85.00	85.00	80.00	75.00
	Student 6+ 10%	90.00	85.00	85.00	85.00	80.00	75.00

# of Classes Taken (spanning the class columns)

You can look at the effect on your tuition fee when both types of discounts (Multi-Class & Multi-Student) are given in a *Combo* type discount rule or you can look at each discount type separately using the *Both, Multi-Class,* and *Multi-Student* tabs.

Edit

Use the **Pencil** icon to edit a current rule. On the *Edit Discount Rule* page, you can rename the rule and/or change components of the Multi-Class or Multi-Student discounts.

You have the option to preview the rule before saving your edits.

Copy

Quickly create a new Discount Rule by copying the settings from a current Discount Rule with the **Copy** (icon). Give the new rule a name, make any necessary changes to the discount settings, and Save Changes.

Delete

Click the **Trash Can** icon to delete a Discount Rule. You cannot delete a Discount Rule that has been **assigned to classes** in your system. Before you can delete a rule with the status of *Assigned* you will need to edit the classes that have that Discount Rule assigned and change them to a different rule. The quickest way to do this is to use *Edit All Classes* from the *Classes (menu)*. Use the search criteria to bring up only classes with the Tuition Discount Rule you want to delete. In the report results, you can

use the Global Change area (highlighted yellow) to change the Discount Rule for all of the classes at once.

 Frequently Asked Questions

Assign Tuition Discount Rules to Classes

Once you have **created your Tuition Discount Rules**, you will need to assign them to the classes that you bill **By Class Tuition Fee**.

Assign a Rule to an Individual Class

The Tuition Discount Rule can be assigned to an individual class on the *Summary* tab of the *Class* record.

Assign a Rule to Multiple Classes

Use **Edit Multiple Classes**, from the *Classes* menu, to assign Tuition Discount Rules to multiple classes. Search for specific classes using search criteria and then assign the rule to those classes from one screen.

Edit Classes

← RETURN   💾 SAVE CHANGES

View 1 - 8 of 8   🖨 Print   ⟳ Refresh   ▦ Show/Hide Columns   ⟲ Restore Columns

Class Name	Category1 Category2 Category3	Fee	Tuition Billing Method	Tuition Billing Cycle	Tuition Discount Rule	Prorate Tuition
Global Change: Edit any field on this row, and it will change all values for classes visible.	▼ ▼ ▼		▼	▼	▼	▼
Advanced Tumbling	Gymnastics ▼ / Advanced ▼ / ▼	120.00	By Class Fee ▼	Monthly ▼	Fall Rec Classes ▼	Yes ▼
Beginner Tumbling	Gymnastics ▼ / Beginner ▼ / ▼	90.00	By Class Fee ▼	Monthly ▼	Fall Rec Classes ▼	Yes ▼
Dolphin - Mon - 7pm	Swim ▼ / Intermediate ▼ / ▼	75.00	By Class Fee ▼	Monthly ▼	No Discounts ▼	Yes ▼

Family Discount Rules

When using the **By Class Fee Billing Method**, the **Family Discount Rule** allows flexibility.

⭐ Override the class discounts for families with special arrangements.
⭐ Post to a specific group of families based on their assigned Family Discount Rule when using *Transactions > Post Tuition Fees*.
⭐ Apply discount for Parent Portal enrollments when a family is assigned a Family Discount Rule.

Business Scenario

Your classes have enrollments for both recreational families and competitive families. Recreational families receive discounts based on the discount rule assigned to the class, but competitive families get a different set of multi-class and multi-student discounts. Assign the competitive families a Family Discount Rule, telling Jackrabbit to ignore the rules assigned to the class and use the Family Discount Rule instead.

When should you use a Family Discount Rule?

There may be times when a family should receive a different discount from the discount rules assigned to their classes. When the class **Tuition Discount Rules** aren't applicable, use the Family Discount Rule to override all of the assigned class rules.

To add this discount rule to a family, the rule must first be created. Family Discount Rules are created the same way as class Tuition Discount Rules. See **Add a New Discount Rule** for step-by-step instructions.

If this rule will be used for an individual family or a specific group of families, name the rule accordingly so it easy to find in your list of Tuition Discount Rules.

Assigning the Family Discount Rule

The Family Discount Rule is assigned to a **family** on their *Billing Info* tab. Use the drop-down list to select the appropriate discount rule and **Save Changes**.

If the family has been given a **Family Fixed Fee**, a Family Discount Rule cannot be added until the Fixed Fee is cleared. Family Discount Rules cannot be used with Family Fixed Fees.

Post Tuition Fees to Families with Discount Rules

When you are ready to **Post Tuition Fees** to an individual family or a specific group of families with a Family Discount Rule, select the **Family Discount Rule** in the *Family Criteria* section (*Transactions > Post Tuition Fees*).

If a student within the family has a **Student Fixed Fee**, the Family Discount Rule will not apply to that student. However, it will apply to any students in the family who do not have a Student Fixed Fee.

Report on Families with a Family Discount Rule

Use All Families filters to find families that have a Family Discount Rule assigned. Select **Yes** for *Has Family Discount* and choose any other search criteria needed. **Submit** for the results.

The Post Tuition Fees Feature - Your #1 Tool for Tuition Posting

Post Tuition Fees, located under the *Transactions* menu, is a powerful tool that allows you to post tuition fees to more than one family at a time. It can also be used to post tuition to a single family or to a specific class.

The tuition fees can be posted immediately (**Post Now**) or scheduled to post at a future date and time (**Post Later**).

The flexibility of the Post Tuition Fees feature makes it an essential tool for posting tuition!

⭐ Jackrabbit does the heavy lifting and calculates all discounting and prorating according to your **Tuition Settings**.

⭐ Prevent tuition fee posting errors with Jackrabbit's **Advanced Detection**.

⭐ Automate! Schedule the posting of your tuition fees. Learn more about **Automated Tuition Fee Posting**.

Permissions control a User's ability to view certain data or perform certain actions. Before moving forward review **User Permissions - Post Tuition Fees to Multiple Families at Once**

The Post Tuition Fees Process

The Post Tuition Fees feature can be used to post to classes with either **Tuition Billing Method** (By

Class Fee or By Total Hours).

Some settings are different between the two methods, but the process is the same (learn about each setting/criteria below):

1. Use the **Post Setting** to determine whether you want to post fees now or post fees later.
2. Select your **Billing Settings** (Billing Method, Billing Cycle, and Tuition Posting Date).
3. Choose your **Class Criteria**, **Family Criteria**, **Multi-Student Discount Settings** (By Total Hours only), and **Additional Settings**. Add **Transaction Details** and define any **Additional Discount** you may want to apply to the posting.
4. Set your preferences for **Advanced Detection**.
5. Preview the tuition fees and make any changes needed. Learn more about the **Preview Tuition Fees page**.
6. **Post Now** or **Post Later** based on the *Post Setting* you selected in Step 1.

Before using Post Tuition Fees, you must first review and define your **Tuition Settings** to tell Jackrabbit what discounts and/or prorating apply to the fees.

Post Tuition Fees Settings & Criteria Explained

Expand each section to learn more about the settings and criteria involved in the Post Tuition Fees process.

> **Expand/Collapse All**

 Post Setting

 Billing Settings

 Class Criteria

 Family Criteria

 Multi-Student Discount Settings

 Additional Settings

 Transaction Details

 Additional Discount

Advanced Detection (Post Tuition Fees Feature)

Reduce billing errors! **Advanced Detection** in **Post Tuition Fees** is a tool designed to identify tuition fees that may have already been posted (duplicate tuition fees). It can also alert you to any fees that are set to post for a student who was enrolled and dropped during the Billing Cycle due to an administrative error, as an example (dropped student fees).

The Advanced Detection settings offer several options. The selections you make here will determine which fees are brought to your attention (highlighted) and which fees are selected to post on the **Preview Tuition Fees page** that is generated when the *Preview Fees* button is selected. The reason for being detected as a duplicate or drop is included in the preview results.

Detect duplicate tuition fees	Select the **Detect** checkbox to enable duplicate detection. Jackrabbit will search for fees with the *Transaction Type = Tuition Fee* that have already been posted to a family's account for the same student during the chosen time frame. If you enable detection, tell Jackrabbit whether or not you want to *Post Fees to detected duplicates.* You'll also be given the option to *Match on Student plus Class, Category 1, and/or Transaction Subtype* (if one was entered in the *Post Tuition Fees - Transaction Details).*

Match on Student plus	Optionally have Jackrabbit also include the **Class** and/or **Category 1** in the criteria for a duplicate fee. The tuition fee for a student must have the same Class/Category 1 to be considered a duplicate. *Note:* If you select a *Transaction Subtype* in the *Transaction Details* section, the *Transaction Subtype* will display as a checkbox below Category 1.
Detect dropped student fees	Select the **Detect** checkbox to have Jackrabbit identify fees set to post to a student who was enrolled *and* dropped in a <u>non-prorated class</u> during the Billing Cycle. Dropped student fees are not detected for prorated classes because Jackrabbit already considers the student enroll and drop dates when prorating the fee according to your Tuition Settings (**Prorating Options**).
Check dates from	Enter the **Check dates from** and **through** to define the time frame to be searched. The system checks for tuition fees posted for the time frame you select. *Note:* When you have selected **Post Later**, the check dates from and through fields default to the first and last day of the Billing Cycle selected and are not editable.

The Preview Tuition Fees page will display a legend for any fees that have been detected and the rows will be highlighted according to the legend.

Preview Tuition Fees

[← RETURN] [POST NOW] [✖ CANCEL]

TRANSACTIONS	TOTAL AMOUNT	FAMILIES	STUDENTS	CLASSES
3	**195.00**	**3**	**3**	**3**
Total Fees	Currency	Total Families	Total Students	Total Classes

3 Selected CLEAR SELECTIONS

Legend

🟨 Duplicate Tuition Fee 🟥 Dropped Student Fee 🟧 Dropped & Duplicate

☐	TRANSACTION DATE	FEE	DISCOUNT	AMOUNT	FAMILY	STUDENT	CLASS	SESSION	DETAILS
☐	Mar 1, 2022	65.00	0.00	65.00	Carter	Austin Carter	Ballet - Mon 6pm	Spring 2022	Details
☑	Mar 1, 2022	81.25	16.25	65.00	Woodland	Cheryl Woodland	Jazz - Tues 7pm	Spring 2022	Details
☐	Mar 1, 2022	65.00	0.00	65.00	Reed	Maddox Reed	Hip Hop - Wed 7pm	Spring 2022	Details
☑	Mar 1, 2022	65.00	0.00	65.00	Ager	Dani Ager	Ballet - Mon 6pm	Spring 2022	Details
☑	Mar 1, 2022	65.00	0.00	65.00	Morris	Toby Morris	Hip Hop - Wed 7pm	Spring 2022	Details

- When you have opted to Post Now in the*Post Tuition Fees - Post Setting,* the checkboxes in the first column of the grid will reflect the selections you made in the *Advanced Detection* settings, however, they can be changed at this point if needed.

- When you have opted to Post Later in the*Post Tuition Fees - Post Setting,* the checkboxes in the first column are disabled. Any changes must be made on the main *Post Tuition Fees* page.

The legend in the above screenshot shows the highlighting for three different scenarios:

Duplicate Tuition Fee
A tuition fee for this student has already been posted to the Family account during the time frame defined for detection. Example Austin Carter was enrolled into Ballet - Mon 6pm and his March tuition fee was posted at that time of enrollment. Later that week, another staff person ran Post Tuition Fees for the March Billing Cycle and Austin was included causing a duplicate transaction.
Dropped Student Fee

This student was enrolled and dropped or transferred from a non-prorated class during the Billing Cycle.

Example

Cheryl Woodward was enrolled in Jazz - Tues 7pm on March 1st by a staff member in error. On March 2nd the staff member realized their error and dropped Cheryl from the class without deleting the enrollment. Later that week another staff member ran Post Tuition fees for the March Billing Cycle and Cheryl was included because she had been enrolled in the class during the Billing Cycle. The row for her tuition is highlighted to alert you to the drop so that you can avoid a billing error.

Dropped & Duplicate

This student was enrolled and dropped from a non-prorated class during the Billing Cycle and a tuition fee has already been posted to the Family account during the time frame defined for detection.

Example

On March 1 Maddox Reed was enrolled in Hip Hop - Wed 7pm by mistake and the tuition fee was posted at that time. This administrative error was discovered on March 2nd and Maddox was dropped from the class. Later that week, another staff person ran Post Tuition Fees for March, and Maddox was included causing a duplicate transaction. The row for Maddox's tuition is highlighted as both a duplicate fee and a dropped student fee.

Fixed Fees will always be displayed as possible duplicates within the selected date range. Be sure to check a fixed fee was not previously posted to a family account before you post the tuition fees. Be sure to double-check the fee type is set to Tuition Fee.

The Preview Tuition Fees Page (Post Tuition Fees Feature)

The **Post Tuition Fees feature** includes a robust preview capability to give you peace of mind. Review the fees that are set to post based on the settings and criteria you've selected. Have the chance to make any necessary changes before you push the Post Now or Post Later button!

Preview Tuition Fees can also be used as a revenue forecasting tool...just because you preview it doesn't mean you have to post it!

The Preview Tuition Fees page has several features:

1   A data summary provides at a glance the totals for the tuition fees to be posted. This data is dynamic; it will update each time a fee is selected or deselected for posting.

When **Advanced Detection** is enabled in the Post Tuition Fees - Advanced Detection Settings, a legend will explain the highlighted fees:

- **Duplicate Tuition Fee** - A fee with the Transaction Type = Tuition Fee has already been posted to the family's account for the same student during the chosen time frame.
- **Dropped Student Fee** - The fee is set to post to a student enrolled and dropped from a non-prorated class in the same Billing Cycle.

2

- **Dropped & Duplicate** - A fee with the Transaction Type = Tuition Fee has already been posted to the family's account for the same student who was enrolled and dropped in the same Billing Cycle (non-prorated class).

The **Dup Reason** column lists the reason for the duplication.

If a family has been omitted from the posting with the **Omit Family from Transactions > Post Tuition Fees** on the Billing Info tab of their*Family* record, they will be highlighted in teal as explained in the legend.

3 The first column in the grid indicates which fees are set to post. When you have opted to Post Now in the Post Tuition Fees - Post Setting, the checkboxes in this column will reflect the selections you made in the Advanced Detection settings. However, they can be changed here if needed. When you opt to Post Later, the checkboxes in this column are disabled.

4 Hyperlinks are provided to access the Family, Student, or Class records quickly.

5 In the Details column, click the link to see details of how the fees were calculated.

Fee Details - By Class Fee Billing Method

Student	Maddox Reed
Class Tuition Fee	65.00
Billing Cycle	3/1/24 - 3/31/24
Enroll Date	2/24/24
Drop Date	3/22/24

No Prorating Class Hip Hop - Wed 7pm

Class Meet Days Wed

	Amount	Notes
Base Tuition Fee	65.00	
Total Tuition	65.00	

CLOSE

Once you have reviewed the tuition fees in the preview and are happy that everything is as it should be, it's time to post the fees.

The post option that displays is determined by the Post Tuition Fees - Post Setting you've selected

Preview Tuition Fees

← RETURN   POST NOW

With the **Post Now** button, the tuition fees will post to your families on the spot. The fees are posted to the family's accounts immediately, and the current balance on their account is updated to include these fees.

Once fees are posted to the accounts, you will see a green confirmation box. A link will take you to a listing of all the tuition fees that were completed and posted.

Preview Tuition Fees

← RETURN   POST LATER

The **Post Later** button opens the Schedule Tuition Fee Task window, where you'll define when and how often you want this posting to run.

Learn more about Automated Tuition Fee Posting

 Frequently Asked Questions

QUIZ - Lesson #9.1 - Post Tuition Fees (By Class Fee Billing Method)

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #9.1 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent. The quiz includes Review questions.

Quiz #9.1 - Post Tuition Fees (By Class Fee Billing Method)

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
13	13	11	10	9

 Return to Lesson #9 - Tuition Fees

 Return to Supervisors and Managers Menu to continue to next lesson

 Click here to provide feedback for this lesson