OPUS

SIE DATA CLOUD

Prepaid Billing with Credits

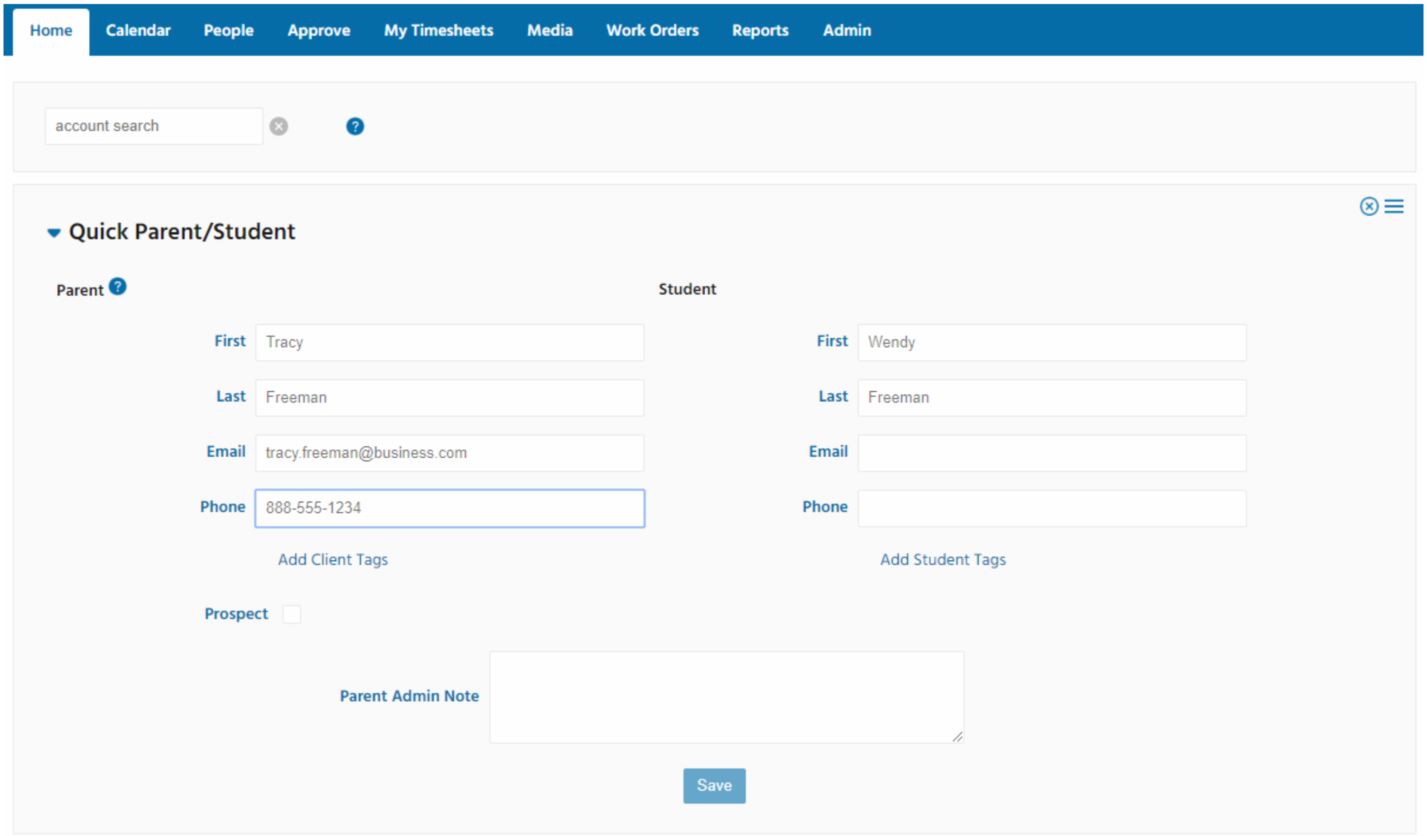
There are 3 main ways to accept payment from your clients: prepayment, pay-as-you-go, and postpayment. Selling prepaid packages is a great alternative to regular invoicing because you can be sure that you have the revenue before rendering services. This is especially helpful if a client does not want to put their credit card on file for pay-as-you-go billing.

Training Assignment: Creating a credit account and prepaid session.

In this training, you will follow the standard prepaid workflow: create a new client and student, add a credit account, invoice for the credits, accept payment for the credits, schedule and log the prepaid session, and approve the prepaid session.

Step 1. Log in and create new parent / student account.

Log into Opus (www.opus.schooliseasy.com/login) and create a new test parent / student in the Quick Add home widget.



Step 2. Add a session credit account for the student.

After saving the New Parent / Student, you will see both the newly created accounts with a few options. Click on the student's name to go to the student's account page. Click the Session Credits sub-tab below the student's contact information, then click the Add Credit Account button.

[pic]

In the session credit form, enter the following items:

1. The number of hours the parent has paid for.
2. The name of an administrator who should get an email when the credits are low.
3. The number of credits at which Opus will send an alert to the administrator.
4. The discounted price of the entire invoice, if any.

Note: the Override Price field overrides the whole price of the invoice, not the hourly rate of the session.

Note: If you are not discounting the price of the prepaid sessions at all, leave the Override Price field blank.

Note: Invoice Credits is enabled by default; do not disable this setting. It is what creates an invoice for these prepaid credits.

[pic]

In this example, the Tracy Freeman has agreed to prepay for 10 hours of In-Home Tutoring, and we are discounting the normal $50/hour price by 10% to $45/hour, for a total invoice price of $450.00. We have added our administrative assistant, Holly Rumsfeld, to receive email updates when Wendy drops below 2 hours (i.e. when she only has 1 hour left).

Step 3. Assign a session type to the student.

Because the session credits are only valid for a particular service (i.e. session type), it's vitally important that you prevent tutor error when logging session reports. Therefore, you'll want to assign a session type to the student that matches the session type of the credit account.

Click on the Session Types sub-tab to the right of the Session Credits sub-tab, and click the Add Session Type button.

[pic]

Select the session type that matches the session credit account you just created. There is no need to fill in any override rate or instructor name, as the override price has already been applied in the previous step. Save the session type, and the student will be restricted to only sessions of this type in the future.

[pic]

In this example, since we used In-Home Tutoring for our credit account, we will again select In Home Tutoring for the session type.

Step 4. Email the new invoice.

When you created a session credit account in step 2, as long as the Invoice Credits setting was enabled, an invoice was generated for the client. Go to Approve → Invoices and find the newly created invoice. Then click the drop-down arrow on the right and select Email from the menu to email the invoice.

Note: Although an Email Invoices button exists at the top of the list, you should not usually use this because you will not want to email all of your outstanding invoices.

[pic]

Step 5. Post a payment against the invoice.

When you have received payment, go to Approve → Invoices and click the Take Payment button next to the invoice.

[pic]

In the pop-up dialog, select the appropriate payment method from the list.

If you received a check, feel free to update the recorded date to be the date of the check. It's also best practice to indicate the check number in the Note field.

When you are done entering the payment, click the Post button to post the payment.

[pic]

Keep in mind that Opus assumes all posted payments are successful, so this action will immediately mark the invoice as Paid and it will disappear.

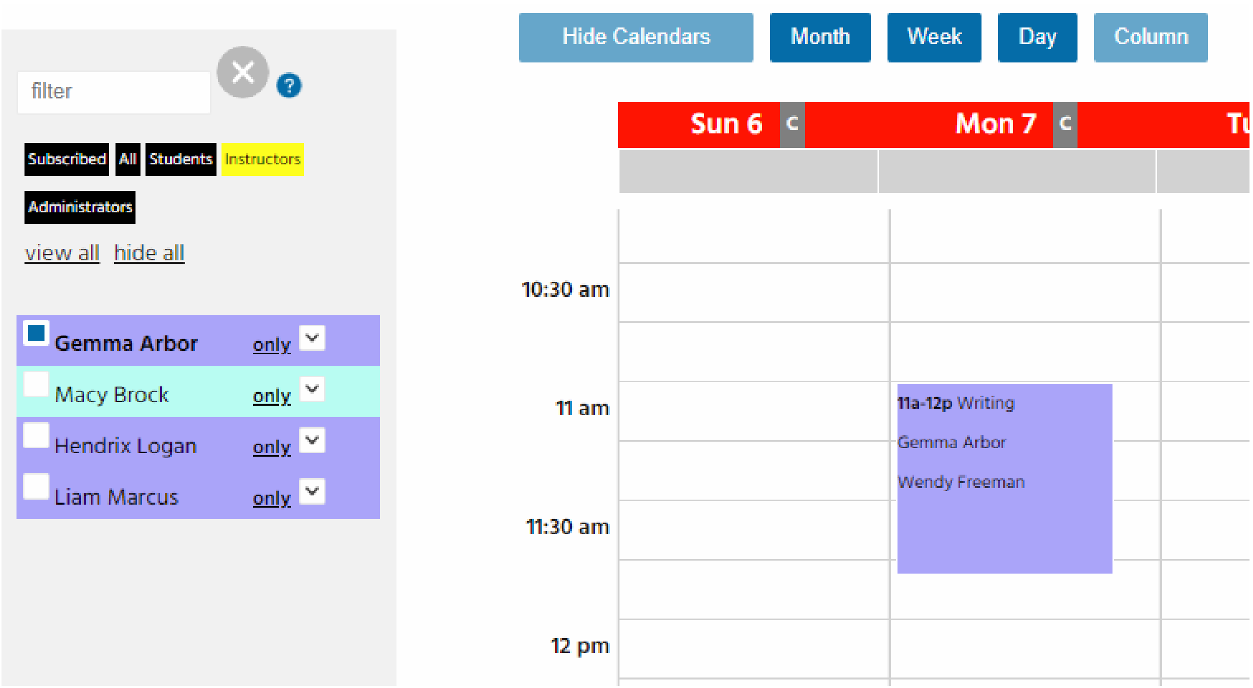
Note: Although there are credit card options in the Payment Method list, none of these options actually charge a card, even if the client has a card on file. As a rule, you should not use these options.

Note: This training document does not cover accepting prepayment by credit card. This is not a usual workflow: if your client is willing to pay by credit card, we suggest following a pay-as-you-go workflow instead.

Step 6. Schedule a session for the student.

Once you have secured prepayment, you would normally start the tutor matching process.

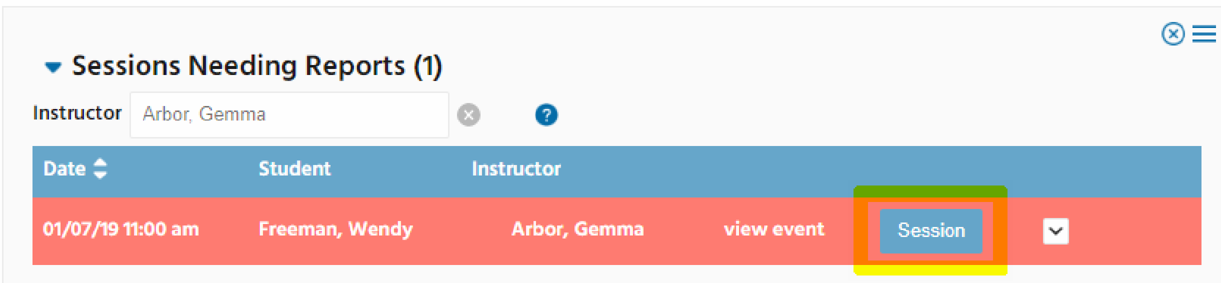
In this example, we will instead skip straight to scheduling. We will schedule a session in the past so we can immediately log a session report.



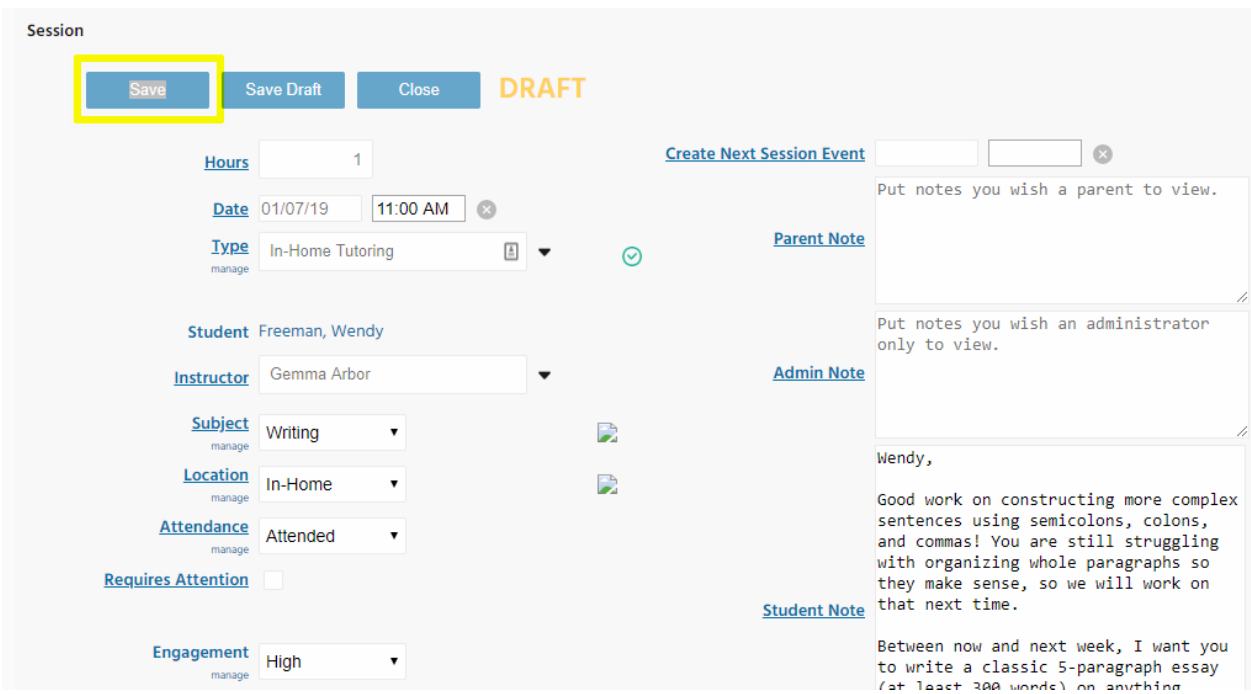
Instructors are normally responsible for scheduling, and they may only schedule in the future. For more information on how to schedule a session, see the Opus Scheduling Training document.

Step 4. Log the session report.

Because the session is in the past, it immediately shows up in the Sessions Needing Reports widget. Set your filter to the appropriate instructor and click the Session button.



Fill out the session report and click Save to submit it for approval.



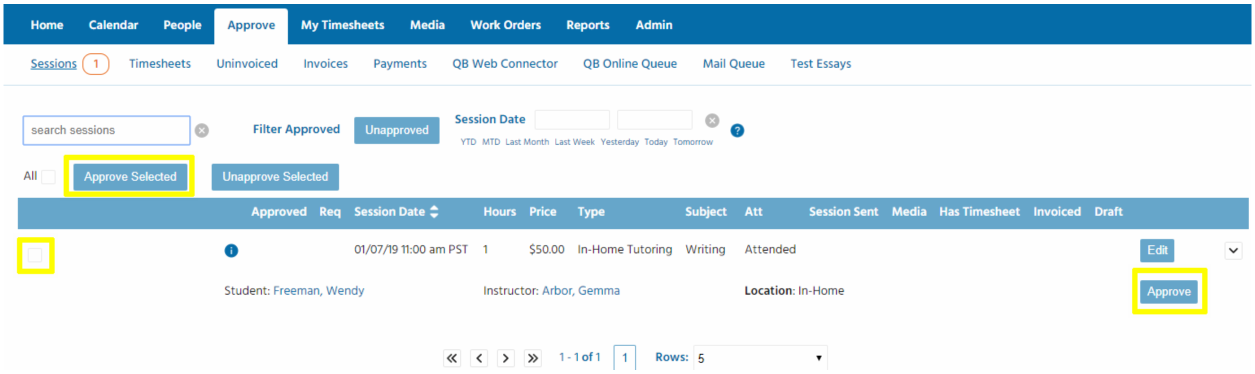
Instructors are normally responsible for logging session reports. For more information on session reports, see the Opus Session Report Training document.

Step 5. Approve the session.

As a rule, you should attempt to check for unapproved sessions every workday. To approve the session, go to Approve → Sessions and click the Approve button next to the session report in the list.

Because the session is already prepaid, it will not appear in the Uninvoiced section once you approve it.

For more information on session report approval, see the Opus Session Approval Training document.



That provides an overview of Prepaid Billing in Opus. We are essentially moving the invoicing/payment process before the session scheduling and reporting process by using the credit feature. A great thing about session credits is that it's a "set it and forget it" feature: as long as a student has a credit account, all of their sessions will automatically pull from credit and not be re-charged.