OPUS

SIE DATA CLOUD

Pay-As-You-Go Billing

There are 3 main ways to accept payment from your clients: prepayment, pay-as-you-go, and postpayment. Although Opus fully supports all 3 models, pay-as-you-go is the easiest billing model in most situations. By keeping a credit card on file and easily charging it after each session, you avoid potential cash-flow problems and administrative overhead.

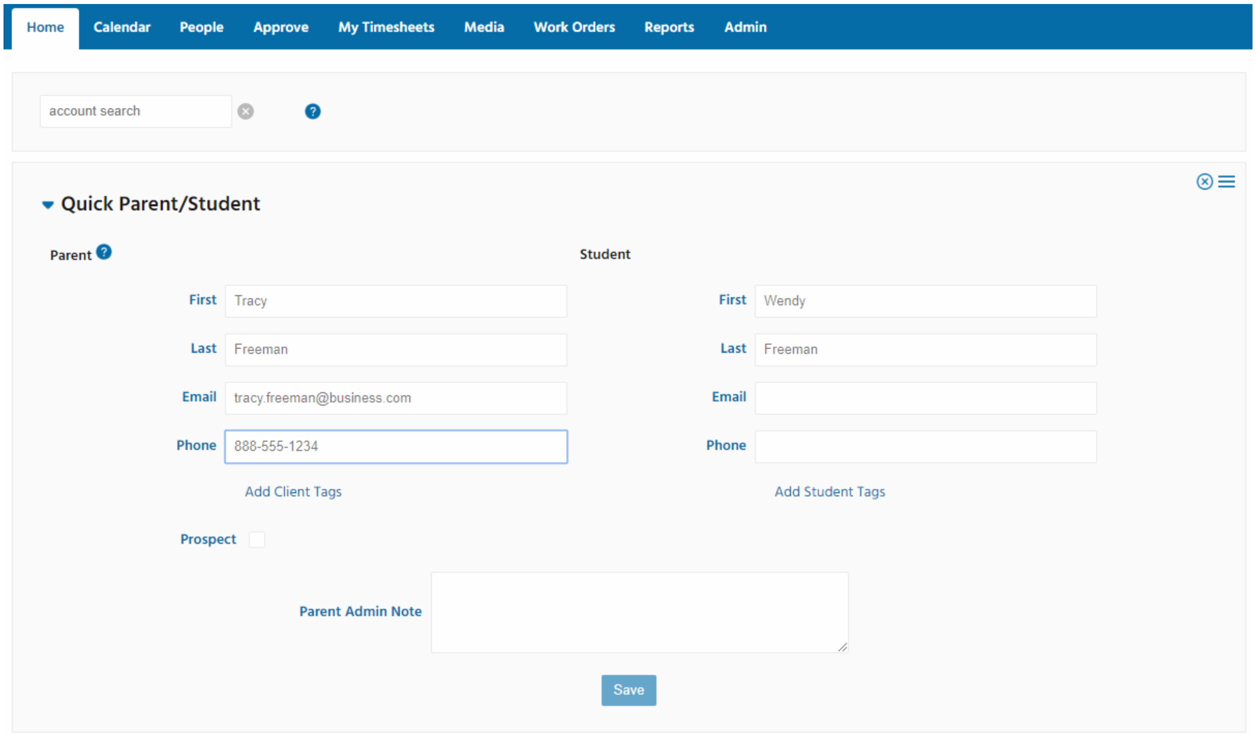
Click here to view a training video on Opus Pay-As-You-Go Billing.

Training Assignment: Charging for a pay-as-you-go session

In this training, you will follow the standard pay-as-you-go workflow: create a new client and student, add a credit card on file, log a session, invoice the session, and charge the card.

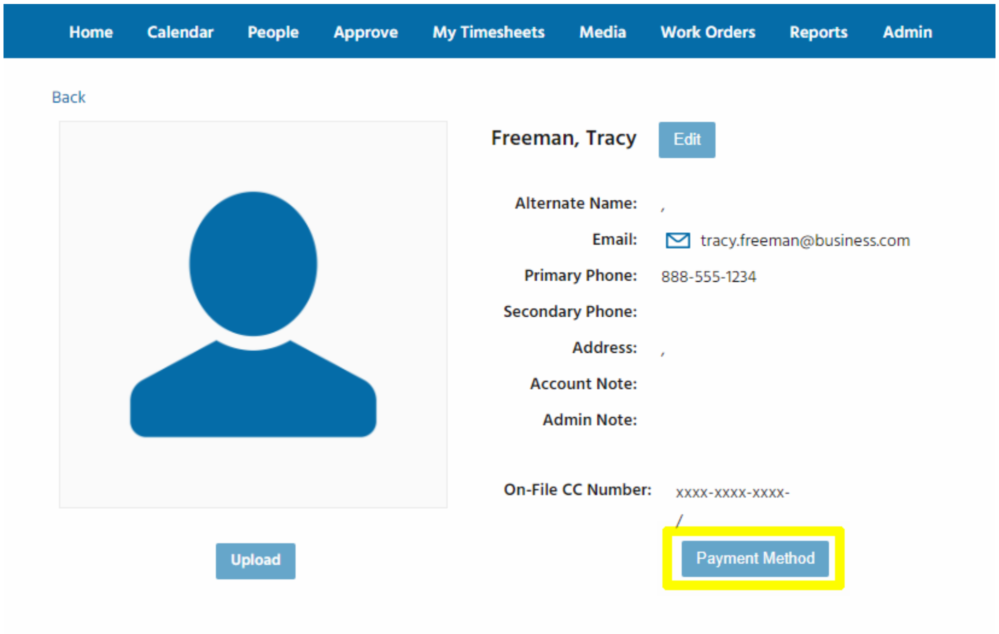
Step 1. Log in and create new parent / student account.

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



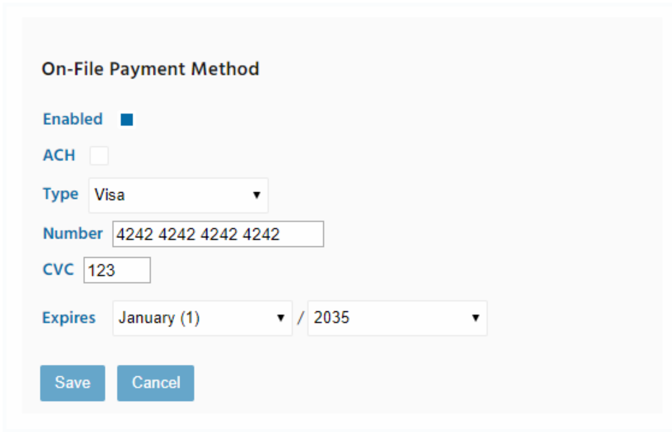
Step 2. Add the client's credit card on file.

After saving the New Parent / Student, you will see both the newly created accounts with a few options. Click on the parent's name to go to the parent's account. Once in the parent's account page, click on the Payment Method button to open the form allowing you to add a credit card on file.

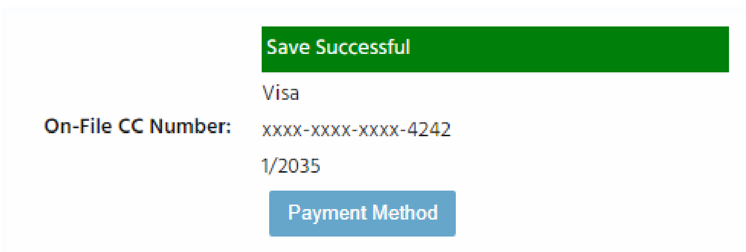


Enter the credit card information into the form and click Save. Since your account is in test mode, you can use the following information to submit a test credit card:

Type: Visa
Card Number: 4242 4242 4242 4242
CVC: 123
Expires: 01 / 2035

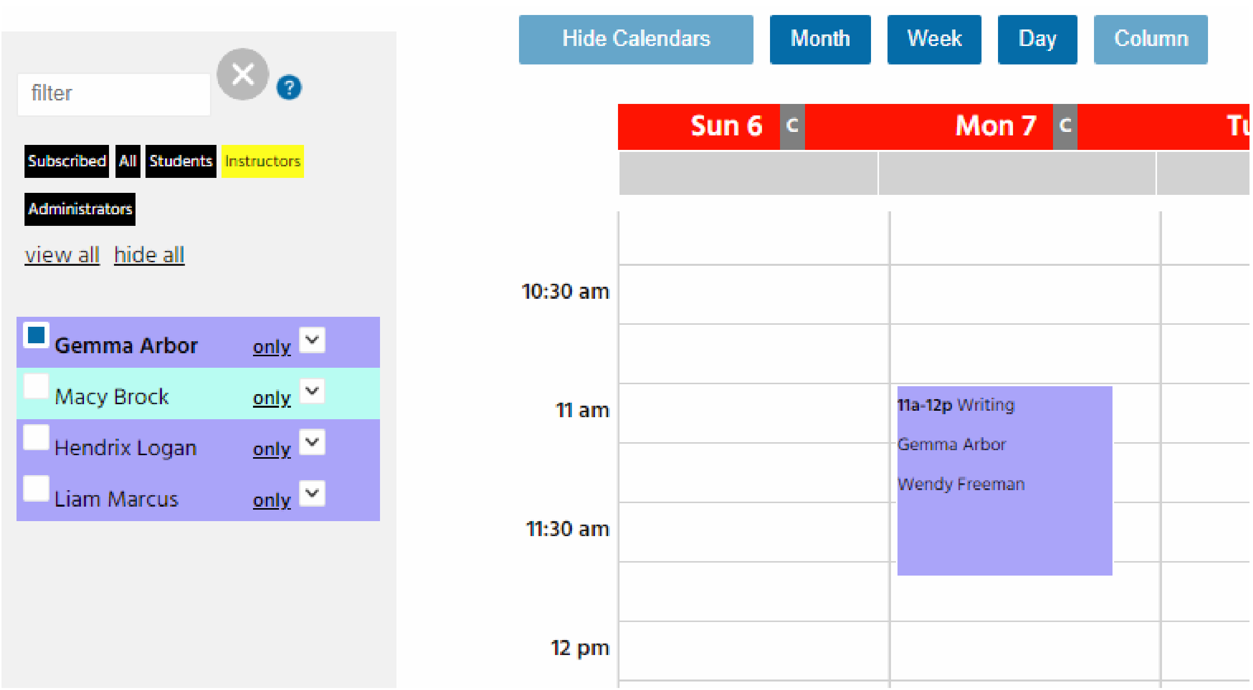


If the card was submitted successfully, you should see a message saying so. Otherwise there will be an error message describing the problem.



Step 3. Schedule a session for the student.

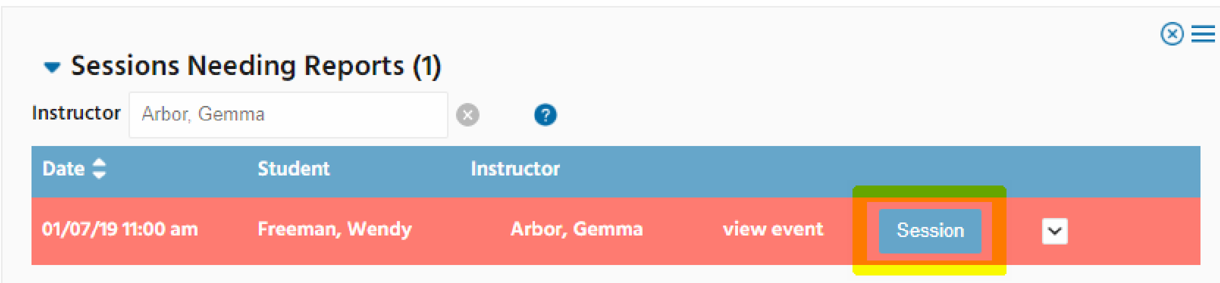
In this example, we will schedule a session in the past so we can immediately log a session report.



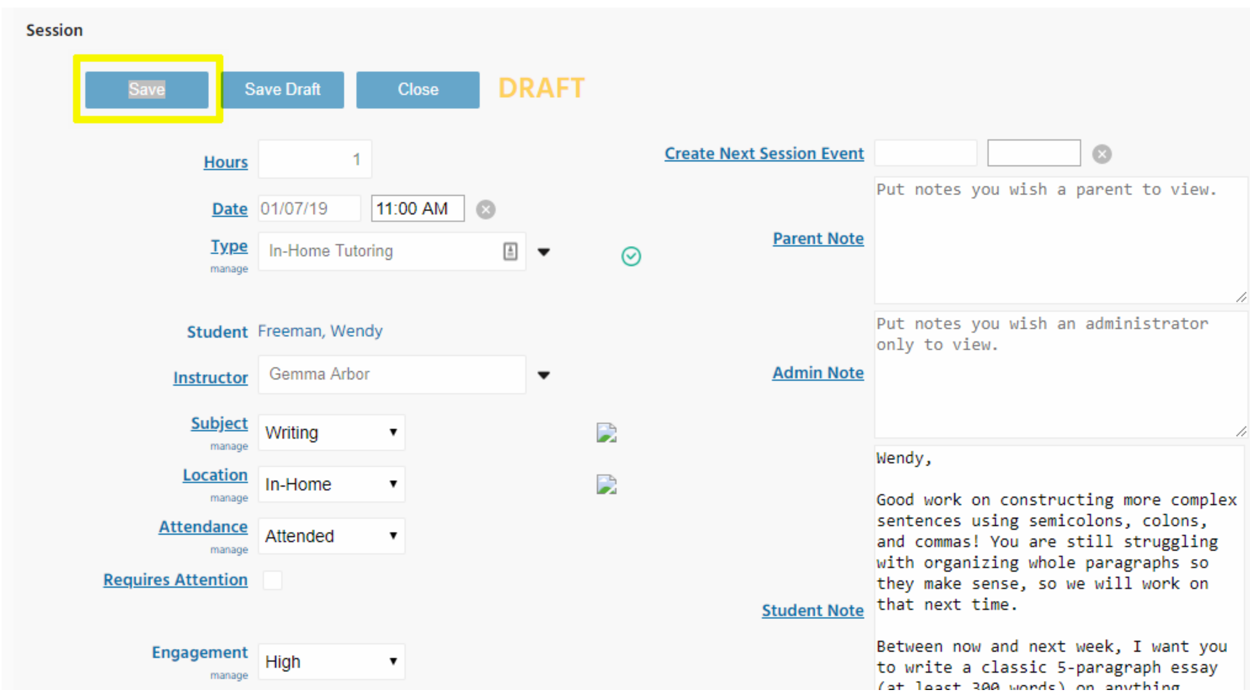
Instructors are normally responsible for scheduling, and they may only schedule in the future. For more information on how to schedule a session, see the Opus Scheduling Training document.

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.

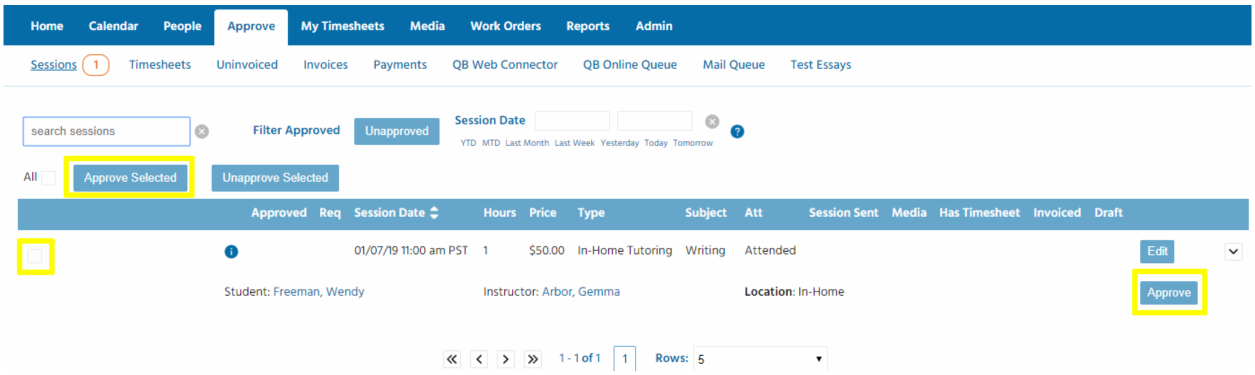


Instructors are normally responsible for logging session reports. For more information on session reports, see the Opus Session Report Training document.

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.

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

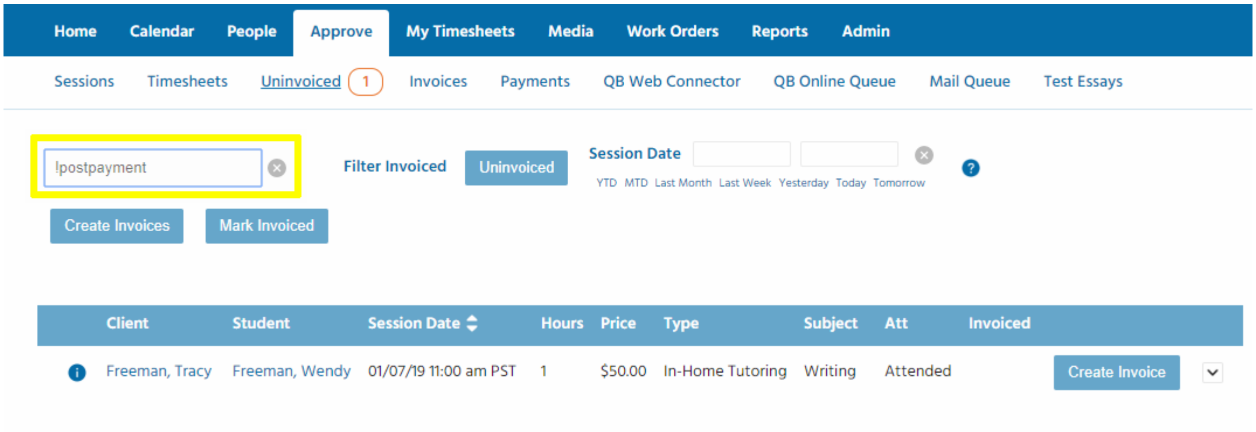


Step 6. Prepare to invoice pay-as-you-go-sessions.

Once you have approved the session, all uninvoiced (i.e. non-prepaid) sessions will show up in the Approve → Uninvoiced section. Go to this section now. You should try to invoice for all pay-as-you-go sessions as soon as you approve them.

If you have any sessions that might be billed using the post-payment model (e.g. if you are working with an agency that requires an invoice every month), make sure to filter those sessions out. **If you are not doing any post-payment billing, skip to the next step.**

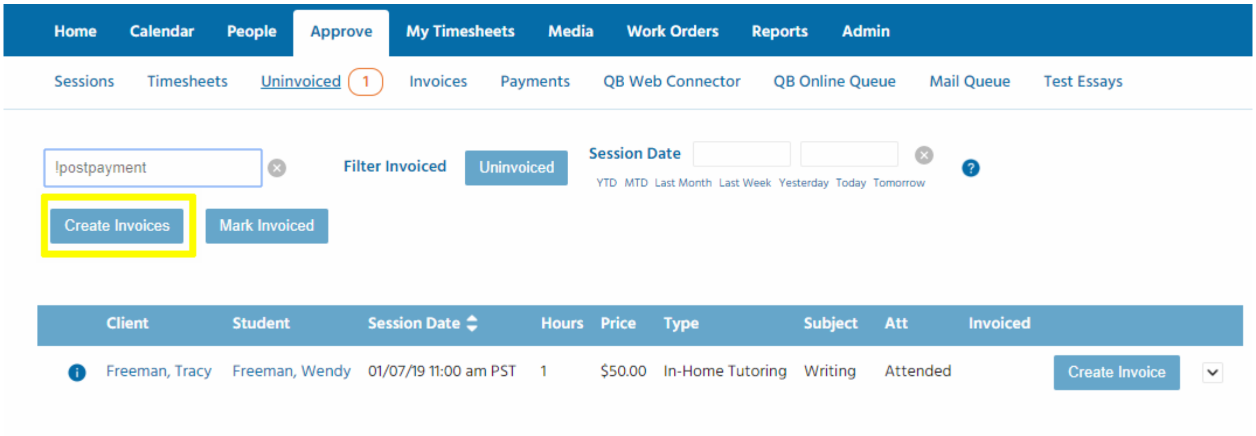
In this example, I have tagged all of my post-payment clients with the “Postpayment” tag. By using the exclamation point operator (“!”), I can tell Opus to filter out all post-payment sessions from the list, leaving only pay-as-you-go-sessions.



For more information on how to manage post-payment billing, see the Opus Post-Payment Billing Training document.

Step 7. Generate invoices.

Once you are confident that all of the sessions ought to be invoiced and charged, click the Create Invoices button. This will generate invoices for all the sessions in the list, bundling sessions for the same client together whenever possible. As a result, you may end up with fewer invoices than sessions.

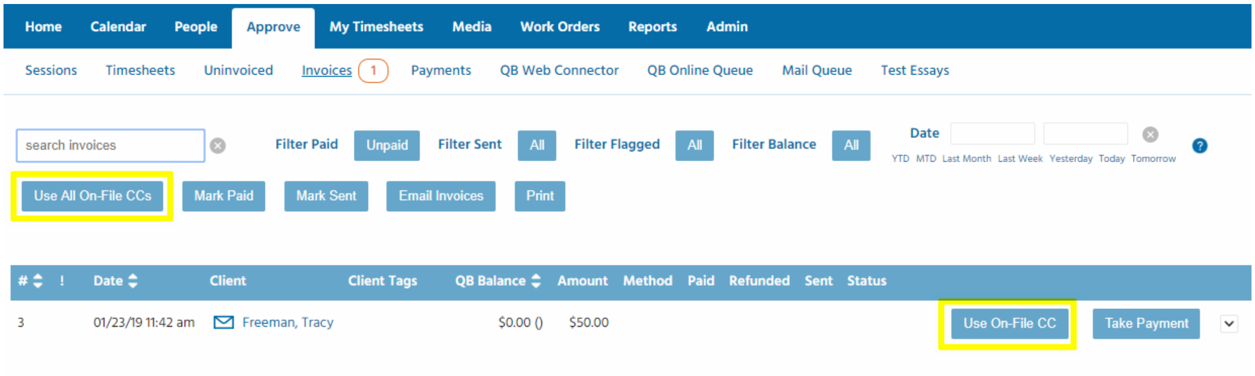


Step 8. Queue payment processing.

The number badge for Approve → Invoices should reflect the number of invoices you created. Go to that section now to see them. These invoices are not emailed to clients, and for pay-as-you-go billing, they do not need to be. You will send a receipt with the credit card charge in the next step.

Either click the On-File CC button next to each invoice individually or click the Use All On-File CCs button at the top of the list. This will queue payments for processing.

Note: no cards have been charged yet.



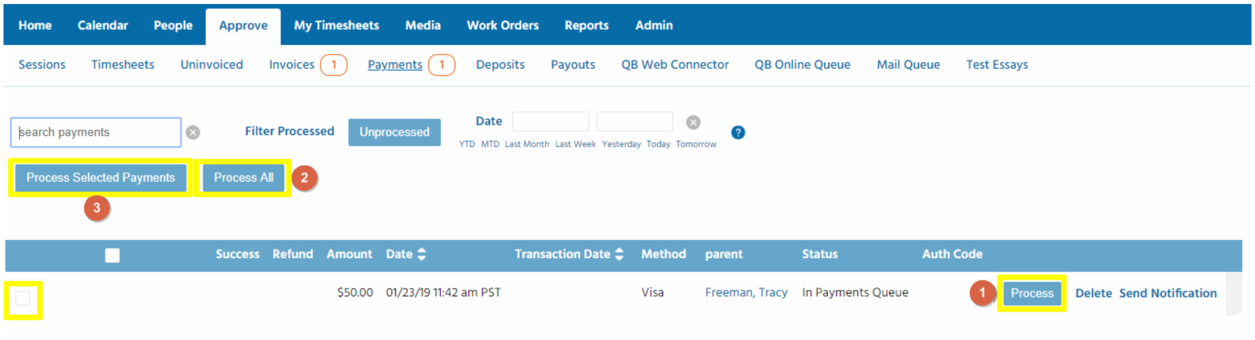
Step 9. Charge cards.

The number badge in Approve → Payments should reflect the number of charges that you queued in the previous step. Go to that section now to see them.

To process credit card charges, you have 3 options:

1. Click the Process button next to each payment record individually
2. Click the Process All button at the top of the list.
3. Select the checkboxes next to the payments you want to process and click the Process Selected button at the top of the list.

These actions will charge credit cards. Make sure you want to run charges before you click any of these buttons.



After 10-60 seconds, the charge results will appear in Opus. You may need to refresh your browser page to see the results (Ctrl+R on Windows, Cmd+R on Mac).

If the charge was successful, the invoice and payment will disappear from the list and the badge numbers will update accordingly. If the charge was not successful, an error message will display in the Status column in both the Invoices and Payments sections.

That provides an overview of Pay-As-You-Go billing in Opus. Remember, these steps don't usually happen all at once. You first create a new account and procure payment information, then later you approve and bill for the session. With the ability to bulk invoice and bulk charge cards, this is by far the easiest and most convenient way to bill for your services.