

OPUS

S I E D A T A C L O U D

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.

The screenshot displays the Opus School Easy web application interface. At the top, a blue navigation bar contains the following menu items: Home, Calendar, People, Approve, My Timesheets, Media, Work Orders, Reports, and Admin. Below the navigation bar is a search bar with the placeholder text 'account search' and a magnifying glass icon. The main content area features a 'Quick Parent/Student' widget, which is currently expanded to show the 'Parent' tab. The form is divided into two columns: 'Parent' and 'Student'. The 'Parent' column contains the following fields: 'First' (Tracy), 'Last' (Freeman), 'Email' (tracy.freeman@business.com), and 'Phone' (888-555-1234). Below these fields are 'Add Client Tags' and a 'Prospect' checkbox (unchecked). The 'Student' column contains the following fields: 'First' (Wendy), 'Last' (Freeman), 'Email', and 'Phone'. Below these fields are 'Add Student Tags'. At the bottom of the form is a 'Parent Admin Note' text area and a 'Save' button.

Field	Parent Value	Student Value
First	Tracy	Wendy
Last	Freeman	Freeman
Email	tracy.freeman@business.com	
Phone	888-555-1234	

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.

Home Calendar People Approve My Timesheets Media Work Orders Reports Admin

Back

Freeman, Tracy [Edit](#)

Alternate Name: ,

Email: tracy.freeman@business.com

Primary Phone: 888-555-1234

Secondary Phone:

Address: ,

Account Note:

Admin Note:

On-File CC Number: xxxx-xxxx-xxxx-

[Payment Method](#)

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

On-File Payment Method

Enabled

ACH

Type

Number

CVC

Expires /

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

Save Successful

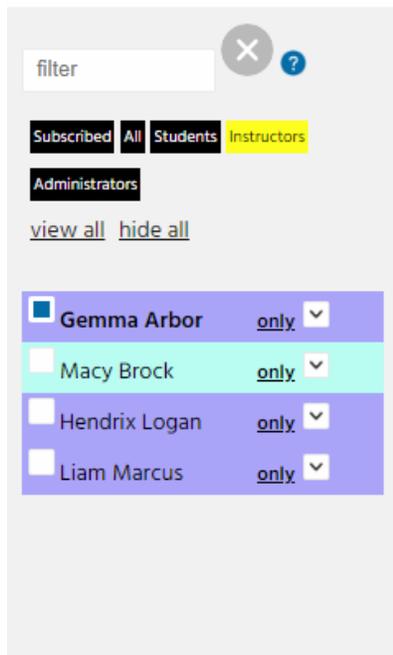
Visa

On-File CC Number: xxx-xxx-xxx-4242

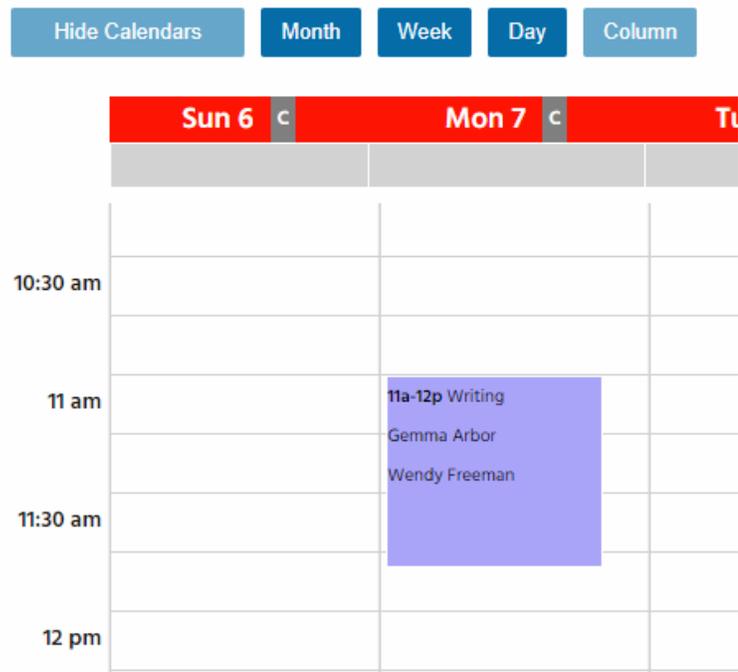
1/2035

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.



A sidebar filter panel with a search box labeled 'filter' and a close button. Below the search box are filter buttons: 'Subscribed', 'All', 'Students', and 'Instructors' (highlighted in yellow). Underneath is an 'Administrators' section with a 'view all' link and a 'hide all' link. A list of users follows, each with a checkbox and a dropdown menu set to 'only': Gemma Arbor (checked), Macy Brock, Hendrix Logan, and Liam Marcus.



A calendar grid interface with navigation buttons: 'Hide Calendars', 'Month', 'Week', 'Day', and 'Column'. The grid shows a session scheduled for Monday, 7th, from 11:00 am to 12:00 pm. The session is titled '11a-12p Writing' and lists 'Gemma Arbor' and 'Wendy Freeman' as participants. The time slots on the left are 10:30 am, 11 am, 11:30 am, and 12 pm. The days of the week are Sun 6, Mon 7, and Tu.

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.

▼ Sessions Needing Reports (1)

Instructor Arbor, Gemma

Date	Student	Instructor		
01/07/19 11:00 am	Freeman, Wendy	Arbor, Gemma	view event	Session

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

Session

Save Save Draft Close DRAFT

Hours 1

Date 01/07/19 11:00 AM

Type In-Home Tutoring

Student Freeman, Wendy

Instructor Gemma Arbor

Subject Writing

Location In-Home

Attendance Attended

Requires Attention

Engagement High

Create Next Session Event

Parent Note

Put notes you wish a parent to view.

Admin Note

Put notes you wish an administrator only to view.

Student Note

Wendy,

Good work on constructing more complex sentences using semicolons, colons, and commas! You are still struggling with organizing whole paragraphs so they make sense, so we will work on that next time.

Between now and next week, I want you to write a classic 5-paragraph essay (at least 200 words) on anything

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.

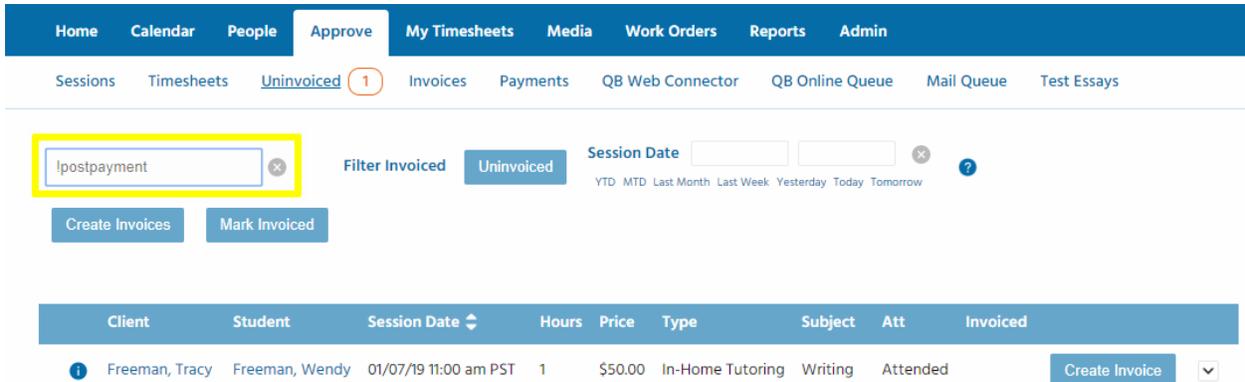
The screenshot shows the 'Approve' section of the Opus interface. The top navigation bar includes 'Home', 'Calendar', 'People', 'Approve', 'My Timesheets', 'Media', 'Work Orders', 'Reports', and 'Admin'. Below this, a sub-navigation bar lists 'Sessions' (with a notification icon), 'Timesheets', 'Uninvoiced', 'Invoices', 'Payments', 'QB Web Connector', 'QB Online Queue', 'Mail Queue', and 'Test Essays'. A search bar labeled 'search sessions' is present, along with filters for 'Filter Approved' and 'Unapproved'. A 'Session Date' filter is also visible with options like 'YTD', 'MTD', 'Last Month', 'Last Week', 'Yesterday', 'Today', and 'Tomorrow'. Below the filters, there are buttons for 'Approve Selected' and 'Unapprove Selected'. The main table displays session details with columns: 'Approved', 'Req', 'Session Date', 'Hours', 'Price', 'Type', 'Subject', 'Att', 'Session Sent', 'Media', 'Has Timesheet', 'Invoiced', and 'Draft'. A single session is listed with the following details: '01/07/19 11:00 am PST', '1' hour, '\$50.00' price, 'In-Home Tutoring' type, 'Writing' subject, and 'Attended' status. Below the session details, it shows 'Student: Freeman, Wendy', 'Instructor: Arbor, Gemma', and 'Location: In-Home'. The 'Approve' button for this session is highlighted with a yellow box. At the bottom, there are navigation arrows and a 'Rows: 5' dropdown menu.

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.



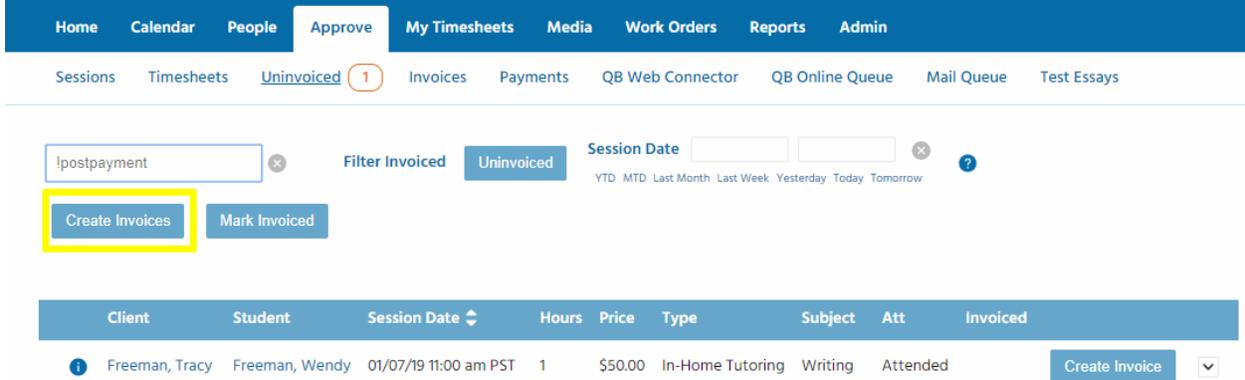
The screenshot shows the Opus software interface. The top navigation bar includes Home, Calendar, People, Approve, My Timesheets, Media, Work Orders, Reports, and Admin. Below this, there are tabs for Sessions, Timesheets, Uninvoiced (with a red circle and the number 1), Invoices, Payments, QB Web Connector, QB Online Queue, Mail Queue, and Test Essays. The main content area has a search bar containing '!postpayment' (highlighted with a yellow box), a 'Filter Invoiced' button, and an 'Uninvoiced' button. To the right, there are 'Session Date' filters (YTD, MTD, Last Month, Last Week, Yesterday, Today, Tomorrow) and a help icon. Below the search bar are 'Create Invoices' and 'Mark Invoiced' buttons. A table below shows session details for Freeman, Tracy and Freeman, Wendy, with columns for Client, Student, Session Date, Hours, Price, Type, Subject, Att, and Invoiced. A 'Create Invoice' button is visible at the end of the row.

Client	Student	Session Date	Hours	Price	Type	Subject	Att	Invoiced
Freeman, Tracy	Freeman, Wendy	01/07/19 11:00 am PST	1	\$50.00	In-Home Tutoring	Writing	Attended	Create Invoice

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.



The screenshot shows a software interface with a top navigation bar containing: Home, Calendar, People, Approve, My Timesheets, Media, Work Orders, Reports, Admin. Below this is a secondary navigation bar with: Sessions, Timesheets, Uninvoiced (1), Invoices, Payments, QB Web Connector, QB Online Queue, Mail Queue, Test Essays. The main content area has a search box containing 'lpostpayment', a 'Filter Invoiced' button, and an 'Uninvoiced' button. To the right, there are 'Session Date' filters: YTD, MTD, Last Month, Last Week, Yesterday, Today, Tomorrow. Below these are two buttons: 'Create Invoices' (highlighted with a yellow box) and 'Mark Invoiced'. A table below shows session details:

Client	Student	Session Date	Hours	Price	Type	Subject	Att	Invoiced
Freeman, Tracy	Freeman, Wendy	01/07/19 11:00 am PST	1	\$50.00	In-Home Tutoring	Writing	Attended	Create Invoice

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.

The screenshot shows the 'Approve' section of the software. The 'Invoices' tab is selected, indicated by a red circle with the number '1'. A search bar and various filter buttons (Paid, Unpaid, Sent, Flagged, Balance) are visible. A yellow box highlights the 'Use All On-File CCs' button. Below the filters is a table with the following data:

#	Date	Client	Client Tags	QB Balance	Amount	Method	Paid	Refunded	Sent	Status
3	01/23/19 11:42 am	Freeman, Tracy		\$0.00 ()	\$50.00					

At the end of the row for the invoice, there are two buttons: 'Use On-File CC' (highlighted in yellow) and 'Take Payment'.

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.

The screenshot shows the Opus software interface. At the top, there is a navigation bar with tabs: Home, Calendar, People, Approve, My Timesheets, Media, Work Orders, Reports, and Admin. Below this, there is a sub-navigation bar with tabs: Sessions, Timesheets, Uninvoiced, Invoices (with a red badge '1'), Payments (with a red badge '1'), Deposits, Payouts, QB Web Connector, QB Online Queue, Mail Queue, and Test Essays. Below the sub-navigation bar, there is a search bar labeled 'Search payments' and a 'Filter Processed' dropdown menu set to 'Unprocessed'. Below the search bar, there are two buttons: 'Process Selected Payments' (with a red badge '3') and 'Process All' (with a red badge '2'). Below these buttons is a table with columns: Success, Refund, Amount, Date, Transaction Date, Method, parent, Status, and Auth Code. A single payment record is visible in the table with a 'Process' button highlighted in yellow and a red badge '1' next to it.

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.