Billing Manager

Achieve's Billing Manager lets you quickly process school charges and record payments. Easily mass assess billing items. Families can pay their bills online via the Family Portal.

Highlights:

Each school can create its own billing items and codes such as Preschool Tuition (PST), K Tuition (KT), MS Tuition (MST), Balance Forward (BF), Recurring Credit (RC), Bounced Check Fee (BCF), Testing Fee (TF), etc. Billing charges may be assigned to those items and auto-inserted when processing, or overwritten at data-entry.

Schools can create their own discount items and corresponding codes (teacher remission (TR), church member discount (CMD), volunteer hour value discount (VHD), financial aid award (FA), etc. Discounts may be calculated automatically, or manually overwritten.

Recurring Charges: numerous billing increments may be established such as monthly, quarterly, semiannual or annual. Ex: if "monthly" is chosen than enter the number of payments, monthly increment (such as every month, every 2 months, etc.) , number of payments, and the start date.

Apply discounts to recurring charges. The user may manipulate the payment schedule to add/skip a month in the cycle. The user may change any individual charge in the recurring payment schedule. The system provides an option to print a payment booklet that is sent to the household – or an automatically emailed invoice. The system includes an option to allow families to pay online via the Achieve Portal.

Billing applies to students, households and faculty. Each may have multiple recurring scheduled charges or numerous one-time charges.

The system will mass assess single or recurring charges. Ex: if mass assessing a recurring charge, the user may enter start and end dates for all monthly charges and assess for all students within a grade or grades. The user may create custom groups for mass assessment of billing items.

The system allows the user to enter a comment with a charge.

The system provides balances for each item, by student, household or faculty. The system displays balances owed for current year and future school years.

When printing statements, the Achieve Billing Manager shows each item's original amount owed, each discount applied to the charge, and each payment applied against the charge.

Achieve Billing Manager can record a single payment and apply against a single charge or multiple charges.

Numerous reports and statements are included:
← Aged Accounts Receivables
← Delinquent Accounts
← Date Range Receipts
← Categorized Receipts
← Categorized Billing Items