

Set Up Billing Codes

Billing codes are used to track different types of fees. For example, you can set up codes for tuition, book fees, activity fees, or any other type of fee that your school charges. You can also use billing codes to generate recurring invoices for customers.

If you're interfacing with ACS General Ledger, you must assign revenue centers to billing codes. For more information, see [Add Revenue Centers](#). After you create billing codes, you can associate one or more with a customer record. For more information, see [Adding a Billing Code to an Individual's Record](#).



Note

Billing codes cannot be added to families. They must be attached to student records.

1. On the Home screen, click **Define List**. The Define List dialog box displays.
2. In the Available Fields list, expand Billing, and click **Billing Codes**.
3. Click **Add**. The Billing Code dialog box displays.
4. Enter a numerical, alphabetical, or alphanumeric Billing Code for the item.
5. If the fee is tax deductible, select the **Tax Deductible** check box, and enter a description for the item. Examples: Tuition, Book Fees.
6. Select the source of the income from the Revenue Center drop-down list. Examples: Lower School, Cafeteria, Tuition, or Activity Fee.
7. Select the number of times the billing will occur from the Frequency drop-down list. Examples: Monthly, Quarterly, Annually.
8. Enter the Regular Amount for an item.
9. Optional: Enter the Amount that will be charged after the grace period expires. In Grace Period, enter the number of days past the due date before late fees will be assessed.
10. Click **OK**.

Additional Field Information

Billing Code

An alphabetical or numerical code that represents a type of fee. For example, enter "TUI" for tuition. Codes can have up to 10 characters.

Tax Deductible

If the charge is tax deductible, such as day care expense, select this check box.

Description

A description of the billing code. For example, if you entered "TUI" in the Billing Code field, you could enter "Tuition" in this field.

Revenue Center

Click to attach a revenue center to the billing code. Revenue centers designate or track the flow of income. Examples of revenue centers are tuition, registration, activity fees, or cafeteria.

Frequency

The frequency this charge will be billed, such as Monthly, Quarterly, or Annually.

Regular Amount

The normal amount for this type of fee.

Discount Amount

The amount your school discounts the original fee. For example, your school charges an annual tuition of \$3,500 for kindergarten students. However, you offer a 10% discount to families with a second child enrolled at your school. Enter "\$350.00" in the Discount Amount field, or click and enter "10" to have the program automatically calculate the discount amount.

Amount

Displays the amount that will be charged, which is the Regular Amount, less any discount amounts.

Amount

The amount you plan to charge when a fee is not paid by the due date.

Grace Period

The grace period or number of days before a late fee is charged. For example, payments are due the first of each month, but you will allow a grace period of 10 days before charging a late fee. Enter "10" here.