



Webinar: June 2021

Fee Tracking and Online Payments in QuickSchools

Introductions

Your Presenter

Azroy Kandan

Head of Support



Q&A Panelists

- Ezekiel: Technical Support Specialist
- Eralyn: Technical Support Specialist

Let's take a Poll

Webinar Format

- Presentation + Demo - 25 min
- Q & A / Close - 5 min

Please submit your questions via “Q&A”. Panelists will answer questions.

Certain questions will be addressed by the Presenter via Live Demo

After the Webinar

- There's a survey after the webinar ends.
- Link to survey will also be included in Thank You email, which we'll send out after the webinar
- You can indicate in the Survey if you're interested a recording of this webinar

Please send us feedback

Agenda / Topics

- Fee Tracking Basics: Student vs. Family Billing
- Fee Categories and Standard Charges
- Payment Allocations
- Online Payments Basics
- Additional Module Integrations
- Advanced Features
- Reporting
- Transaction Fees
- Summary

Fee Tracking Basics

- Charges vs. Invoices
- Generating Statements
- Categories
- Standard Charges
- Email Templates
- Bulk Functions
- PDF Customizations
- Student Billing vs Family Billing

Let's take a Poll

Family Billing

- Assign Primary Payer for each student
 - Students can have multiple Primary Payer
 - Primary Payer can have multiple student
- Billing is by Primary Payer
 - If Student has multiple Primary Payer, ONE must be designated as the PRIMARY
 - Can rename Family Info

<https://blog.quickschools.com/2021/06/11/student-billing-vs-family-billing/>

Payment Allocations

- Used to track unpaid charges/invoices
- When payment is received, link to a charge
- Reporting

Let's take a Poll

Online Payments

Let's take a Poll

- Connecting to Stripe
- Collecting Payments
 - Student Portal vs. Parent Portal
 - Student Billing vs. Family Billing
- Issuing Refunds
- Synchronizing with Stripe

<https://blog.quickschools.com/2018/07/16/online-payments/>

Online Payments - Online Forms

FEE SETUP

Setup the fees that you'd like to collect. If fees are made mandatory, users won't be able to submit their forms until they've paid.

Fee Payment
Instructions

Please select the fee for the chosen club

Save

Currency

CAD

 Add Fee

	FEE	AMOUNT	ACTIONS
::	Chess Fee Category: Club <i>Submitters can select the number of items they purchase.</i>	\$ 150.00	Edit Delete
::	Soccer Fee Category: Club <i>Quantity: 1</i>	\$ 200.00	Edit Delete
::	Theater Fee Category: Club <i>Quantity: 1</i>	\$ 150.00	Edit Delete
::	Taekwondo Fee Category: Club <i>Quantity: 1</i>	\$ 250.00	Edit Delete
::	Debate Fee Category: Club <i>Quantity: 1</i>	\$ 100.00	Edit Delete



Online Payments - Admissions

Collect Fees ^(?)

If you'd like to collect fees with submissions, enable it below. Users will be able to pay fees with their credit card.

Enable Fee Payments

Enable Fees billed to Fee Tracking

Fee Payment
Instructions

Please Submit Payment for your Admissions Application

Currency

CAD

Setup the fees that you'd like to collect. If fees are made mandatory, users won't be able to submit their forms until they've paid.

 Add Fee

	FEE	AMOUNT	ACTIONS
::	Tuition Fee (Deposit) Fee Category: Tuition <i>This fee is mandatory. Quantity: 1</i>	\$ 100.00	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
::	Textbooks (Reservation Fee) Fee Category: Books <i>This fee is mandatory. Quantity: 1</i>	\$ 50.00	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Advanced Features: Paying as Admin

Jesus Dacanay Peralta Close

Statement:
Current Charges

CURRENT CHARGES

Opening Balance: \$
Outstanding Balance
Unallocated Payment

Add Charge Add Pay Now

Pay Current Charges

Payee: Parent

Payment Method: Credit Card

Credit Card Selection: Visa ****-****-****-4242

Current Balance: \$ 1095.54
 Other Balance

Ok Cancel

DATE	CAT	AMOUNT	DELETE
06/10/2021		\$ -500.00	Delete
06/10/2021		\$ 1000.00	Delete
06/10/2021		\$ 20.21	

PDF: [Preview](#) [Download](#)
Due date: 06/10/2021
Credit Card Fee - Visa **4242 (Jesus Dacanay Peralta) (Credit Car...) [Show Items](#)

Advanced Features – ACH (Coming Soon)

Alvin DeSilva

Statement:

Current Charges

CURRENT CHARGES

Default: STRIPE TEST BANK **6789

Balance: \$ 1000.00

Payment Options

Pay Now

Credit card fees apply. This will be displayed prior to payment confirmation.

Opening Balance: \$ 0.00

Outstanding Balance: \$ 1000.00

Unallocated Payment: \$ 0.00

DATE ▼	CATEGORY	DESCRIPTION	AMOUNT
06/09/2021		Tuition Fees Due date: 06/10/2021	\$ 1000.00

Let's take a Poll

Reporting

SCHOOL FEES REPORTS

Fees Tracking Charge / Invoice Allocations List of Charges / Invoices and how they are Allocated to Payments. NOTE: Payment amount is the original amount (not the remaining payment amount)	View Excel ☆
Fees Tracking Payment Allocations List of Payments and how they are Allocated to Charges. NOTE: Charge amount is the original amount on the charge/invoice (not the remaining charge amount)	View Excel ☆
Fees Tracking Transactions List of Fees Tracking Transactions	View Excel ☆ Fee Tracking Details List of Fee Tracking Transactions View Excel ☆ Fee Tracking Details by Student List of Fee Tracking Transactions View Excel ☆ Fee Tracking Summary by Description Total amounts grouped by description

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You can also build reports in Report Creator.

Fees

- Credit Card is 3.9% + \$0.30
 - International / Foreign Currency Extra
- ACH is 1.0% + \$0.25 (Coming Soon)

You can have parents pay the fee as a convenience fee.

<https://blog.quickschools.com/2020/09/10/transaction-fees-for-international-payments/>

Summary

- Multiple Ways to Collect Fees
- Credit Cards vs. ACH
- Extensive Reporting

Let's take a Poll

Thank You

Don't forget the survey

