



Before and After (New) Release 3.0.8 Billing Screen Shots

In Release 3.0.8, OnCare has made a number of enhancements to the billing functions. Following are the before and after(new) screen shots in the few areas that were changed as related to the Program Schedule Based billing.

1. BILLING SETUP

Before



New



2. AUTOMATIC RECURRING RULE SETUP

Before

>> Automatic Recurring Posting

[Back](#)

The System is setup to automatically post the recurring tuition charges to the Family Ledger. Please confirm the settings for your center.

Billing Cycles

Default	Name	Description	Action
<input type="radio"/>	Monthly Billing	Monthly billing that occurs on 20th of every month(s) and entered in advance of posting date	Edit
<input checked="" type="radio"/>	Weekly Billing	Weekly billing that occurs on Monday of every week(s) and entered on the same day as posting date	Edit

☐ Automatic billing and posting for Summer Camp

☒ Send email reminder before system runs automatic billing

[Save](#)

This is replaced with a more robust recurring billing setup as shown below

New

>> Automatic Recurring Billing Rule

[Back](#)

Setup automatic recurring billing rules to calculate and post entries to all active account ledgers below:

[Add New](#)

Review and Automatic Post

Recurring Billing Type	Billing Cycle	Post Date / Day	Upcoming Posting		Status	Action
			For Period	Posting Date		
Program Schedule Based	Weekly	Every Monday	05/23/2016 - 05/29/2016	05/23/2016	Active	Review Edit Posting History
Program Schedule Based	Monthly	20th of Every Month	June, 2016	05/20/2016	Active	Review Edit Posting History

>> Edit Automatic Recurring Billing Rule

[Back](#)

Automatic Recurring Billing Rule

Recurring Billing Type: Program Schedule Based

Billing Cycle: Weekly

Day of Automatic Recurring Posting: Monday

How You Bill: Current

Rule Status: Active

Billing Run Method: Automatic Post

Email Reminders

Email Reminder to Director: ☒ Yes ☐ No ?

Email Reminder to Parents: ☐ Yes ☒ No ?

[Save](#) [Suspend Billing](#)

This is the new page to add or edit Automatic Recurring Billing Rule

3. ADD BILLING ITEMS

Before

Navigation: [Main Menu](#) [Setup](#) [Reports](#) [Functions](#)

>> Billing Setup

[Back](#)

Transaction Type: Description: Standard Amount: \$ G/L Account: G/L Account Description: Status:

View:

No.	Transaction Type	Description	Standard Amount	G/L Account No	G/L Description	Status	Action
1	Tuition Charge	A KOnly/3Day	\$ 210.26	40150	Tuition-School Age	Active	Edit
2	Tuition Charge	A KOnly/5Day	\$ 272.82	40150	Tuition-School Age	Active	Edit

New

Navigation: [Main Menu](#) [Setup](#) [Reports](#) [Functions](#)

>> Billing Items Setup

[Back](#)

To add new billing item, click here [Add New](#)

Setup billing items (tuition charges, other charges, credits and payment) for your center below:

View:

No.	Transaction Type	Description	Standard Amount	G/L Account No	G/L Description	Status	Action
1	Tuition Charge	A KOnly/3Day	\$ 210.26	40150	Tuition-School Age	Active	Edit
2	Tuition Charge	A KOnly/5Day	\$ 272.82	40150	Tuition-School Age	Active	Edit

Navigation: [Main Menu](#) [Setup](#) [Reports](#) [Functions](#)

>> Billing Items Setup

[Back](#)

Setup billing items (tuition charges, other charges, credits and payment) for your center below:

View:

[Add / Edit Billing Item](#)

Transaction Type:

Description:

Standard Amount:

G/L Account:

G/L Account Description:

Status:

4. CHILD TUITION SECTION

Before

Child Tuition[Add New Row](#)

Billing Cycle Weekly

Ledger Type	Transaction Type	Billing / Credit Description	Amount / Credit %	Comments	Start Date	End Date	Action
Sponsor	Tuitioncharge	Threes-FD/3Day	262.56	Silas Burton	08/31/2015		Edit Delete Add % Discount
		Employee Discount	100.0%	Silas	08/31/2015		Edit Delete

New

Child Tuition[Add New Billing](#)

Any billing item added here in the Child Tuition section will be used for Automatic Recurring Billing.

Program Schedule Based

Billing Cycle: Weekly [Change Billing Cycle](#)

Ledger Type	Transaction Type	Billing / Credit Description	Amount / Credit %	Comments	Start Date	End Date	Status	Action
Sponsor	Tuition Charge	Threes-FD/3Day	262.56	Silas Burton	08/31/2015		Active	Edit Delete Add % Discount
		Employee Discount	100.0%	Silas				Edit Delete

To change Billing Cycle, click here. Will be prompted with a pop up as shown below.

Child Tuition[Add New Billing](#) [View History](#)

Any billing item added here in the Child Tuition section will be used for Automatic Recurring Billing.

Program Schedule Based

Billing Cycle: Weekly [Change Billing Cycle](#)

Change Billing Cycle

Billing Cycle Weekly

Save

Ledger Type	Transaction Type	Billing / Credit Description	Credit %	Comments	Start Date	End Date	Status	Action
Sponsor	Tuition Charge	PS-FD/5Day	184.62	Colton Simms	01/07/2013		Active	Edit Delete Add % Discount
		Cash Discount	2.5%	Colton				Edit Delete

5. CHILD TUITION – VIEW HISTORY

Before

Child tuition history was shown on the child tuition section

Child Tuition							
Billing Cycle		Weekly		Add New Row			
Ledger Type	Transaction Type	Billing / Credit Description	Amount / Credit %	Comments	Start Date	End Date	Action
Sponsor	Tuitioncharge	Infants-FD/3Day	147.69	Colton Simms	01/04/2013		Edit Delete Add % Discount
		Cash Discount	2.5%	Colton	01/04/2013		Edit Delete
Sponsor	Tuitioncharge	PS-FD/5Day	184.62	Colton Simms	01/07/2013		Edit Delete Add % Discount
		Cash Discount	2.5%	Colton	01/07/2013		Edit Delete

New

Child tuition history is now hidden. To view history, click here and history will be shown in a different window.

Child Tuition

Any billing item added here in the Child Tuition section will be used for Automatic Recurring Billing.

[Add New Billing](#)

[View History](#)

Program Schedule Based

Billing Cycle: Weekly

[Change Billing Cycle](#)

Ledger Type	Transaction Type	Billing / Credit Description	Amount / Credit %	Comments	Start Date	End Date	Status	Action
Sponsor	Tuition Charge	PS-FD/5Day	184.62	Colton Simms	01/07/2013		Active	Edit Delete Add % Discount
		Cash Discount	2.5%	Colton				Edit Delete

View History							
Program Schedule Based - Weekly							
Ledger Type	Transaction Type	Billing / Credit Description	Amount / Credit %	Comments	Start Date	End Date	Status
Sponsor	Tuition Charge	Infants-FD/3Day	147.69	Colton Simms		01/04/2013	Active
		Cash Discount	2.5%	Colton			

6. FAMILY ACCOUNT LEDGER

Before

Show Ledger All ☒ Hide Void Post Ledger Item ?

Ledger	Posting Date	Check #	Description	Comments	Child Name	Charges	Credit	Balance	Action
Sponsor	04/25/2016		Employee Discount	Avery - Audrey Burton	Avery		\$ 317.95	\$ 262.56	Void
Sponsor	04/25/2016		Employee Discount	Silas	Silas		\$ 262.56	\$ 0.00	Void
Sponsor	05/02/2016		PK-FD/5Day	Avery Burton	Avery	\$ 317.95		\$ 317.95	Void
Sponsor	05/02/2016		Threes-FD/3Day	Silas Burton	Silas	\$ 262.56		\$ 580.51	Void
Sponsor	05/02/2016		Employee Discount	Avery - Audrey Burton	Avery		\$ 317.95	\$ 262.56	Void
Sponsor	05/02/2016		Employee Discount	Silas	Silas		\$ 262.56	\$ 0.00	Void
Sponsor	05/09/2016		PK-FD/5Day	Avery Burton	Avery	\$ 317.95		\$ 317.95	Void
Sponsor	05/09/2016		Threes-FD/3Day	Silas Burton	Silas	\$ 262.56		\$ 580.51	Void
Sponsor	05/09/2016		Employee Discount	Avery - Audrey Burton	Avery		\$ 317.95	\$ 262.56	Void
Sponsor	05/09/2016		Employee Discount	Silas	Silas		\$ 262.56	\$ 0.00	Void
Sponsor	05/16/2016		PK-FD/5Day	Avery Burton	Avery	\$ 317.95		\$ 317.95	Void
Sponsor	05/16/2016		Threes-FD/3Day	Silas Burton	Silas	\$ 262.56		\$ 580.51	Void
Sponsor	05/16/2016		Employee Discount	Avery - Audrey Burton	Avery		\$ 317.95	\$ 262.56	Void
Sponsor	05/16/2016		Employee Discount	Silas	Silas		\$ 262.56	\$ 0.00	Void
Today's Bal.							\$	0.00	

New

A new Billing Period column is added

Show Ledger All ☒ Hide Void Post Ledger Item ?

Ledger	Posting Date	Check #	Description	Billing Period	Comments	Child Name	Charges	Credit	Balance	Action
Sponsor	04/25/2016		Employee Discount		Avery - Audrey Burton	Avery		\$ 317.95	\$ 262.56	Void
Sponsor	04/25/2016		Employee Discount		Silas	Silas		\$ 262.56	\$ 0.00	Void
Sponsor	05/02/2016		PK-FD/5Day		Avery Burton	Avery	\$ 317.95		\$ 317.95	Void
Sponsor	05/02/2016		Threes-FD/3Day		Silas Burton	Silas	\$ 262.56		\$ 580.51	Void
Sponsor	05/02/2016		Employee Discount		Avery - Audrey Burton	Avery		\$ 317.95	\$ 262.56	Void
Sponsor	05/02/2016		Employee Discount		Silas	Silas		\$ 262.56	\$ 0.00	Void
Sponsor	05/09/2016		PK-FD/5Day	05/09/2016 - 05/15/2016	Avery Burton	Avery	\$ 317.95		\$ 317.95	Void
Sponsor	05/09/2016		Threes-FD/3Day	05/09/2016 - 05/15/2016	Silas Burton	Silas	\$ 262.56		\$ 580.51	Void
Sponsor	05/09/2016		Employee Discount	05/09/2016 - 05/15/2016	Avery - Audrey Burton	Avery		\$ 317.95	\$ 262.56	Void
Sponsor	05/09/2016		Employee Discount	05/09/2016 - 05/15/2016	Silas	Silas		\$ 262.56	\$ 0.00	Void
Sponsor	05/16/2016		PK-FD/5Day	05/16/2016 - 05/22/2016	Avery Burton	Avery	\$ 317.95		\$ 317.95	Void
Sponsor	05/16/2016		Threes-FD/3Day	05/16/2016 - 05/22/2016	Silas Burton	Silas	\$ 262.56		\$ 580.51	Void
Sponsor	05/16/2016		Employee Discount	05/16/2016 - 05/22/2016	Avery - Audrey Burton	Avery		\$ 317.95	\$ 262.56	Void
Sponsor	05/16/2016		Employee Discount	05/16/2016 - 05/22/2016	Silas	Silas		\$ 262.56	\$ 0.00	Void
Today's Bal.							\$		0.00	

Note:

In addition to **Program Schedule based billing** changes described above, Release 3.0.8 also added the new **Attendance based billing** which include before care, after care, drop-in care, early drop-off and late pick-up automatic billing. If you are interested to learn more, please contact support@oncare3.com.