

Defining Mass Billing Codes in Accounts Receivable

Use the Define Lists window to set up mass billing codes for items that you bill routinely to a large percentage of your customers. Typical examples include tuition, equipment rental, and textbooks.

By assigning billing codes to customers' records, you can generate invoices for that group of customers all at once, saving time and simplifying your workflow.

Note

If **Track Family Records** is selected on the [AR Setup Tab](#), billing codes should be assigned to records with type "Student" or "Other." In cases where the charge pertains to a family and not a particular student, registration or parent/teacher fees, for example, billing codes can also be assigned to a family record.

1. Under Advanced Tools, click the **Define Lists** tab.
2. Select **Accounts Receivable** from the drop-down list and click **Go** .
3. Click **Mass Billing Codes**, then **Add**.
4. Enter the information for the new code. Use the field descriptions in this topic as reference.
5. To define other mass billing codes, select **Add Another**.
6. Click **OK**, then **Close**.

Note

If you click **Cancel** while adding a billing code, the billing code, as well as any discounts you have assigned to it, will be canceled.

1. Under Advanced Tools, click the **Define Lists** tab.
2. Select **Accounts Receivable** from the drop-down list and click **Go** .
3. Click **Mass Billing Codes**, then select the code you want to delete.
4. Click *Delete* and confirm the action. If customers are currently assigned to the code, you are notified.
5. Click **Close**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. Select **Accounts Receivable** from the drop-down list and click **Go** .
3. Click **Mass Billing Codes**, then **Print**.
4. To include a list of the individuals assigned to each code, click **Include Detail?**
5. To include inactive codes, click **Include Inactive Lists?**
6. Click **Preview** to view the report on screen or **Print** to send the report to your printer.

Additional Field Information

Billing Code

Enter the code you want to use. This can be up to six alphanumeric characters long. You may want to consider a descriptive code: DAYCAR for a day care tuition fee, for example. If you use numbers of fewer than six characters, leading zeros will be inserted.

Billing Description

Enter a phrase that sums up the purpose of the billing code: "Registration fee for toddlers' class," for example.

Fee Description

Select a fee to associate with this billing code. The list of fees are set up in the Fees section of the Define Lists window.

Default Frequency/Amount

Enter the frequency and amount to use when assigning this code to customers. These are only defaults, and you can change them for individual customers after they are assigned. For school or daycare, typically, a billing code is created for each grade for tracking purposes, and the parents' payment frequency is set when being assigned to the student record.

Accept Discounts

If selected, any discount associated with the customer's record apply to the billing code. This option defaults to selected. However, if the billing code should only apply specific discounts, these should be defined on the **Discounts** tab.

Discounts Tab

By default, a billing code accepts all discounts assigned to a customer record; however, you can use this tab to select a specific discount for a billing code if needed. If entered, only those discounts are used from a customer's record when generating mass billing code invoices. However, if your billing code has a discount amount equal to the invoice amount, an error displays, and you must edit the billing code to remove the discount.

The **Billing** tab of the Customer window displays the billing code, original amount, total discount amount for the billing code (based on accepted discounts), and the net total.