

Billing- Transactional versus Defined

Last Modified on 12/07/2020 7:11 am EST

Each site is set up as transactional or defined billing, this will relate to how a site is able to bill their families.

- Defined billing means a site will only ever bill one period at a time, the nice feature of defined billing is that billing can be recreated in the current period so any rate changes or new discounts will be added to the family statement without having to create a manual debit or credit
- Transactional billing means a site will have the ability to bill multiple billing periods and types without major restriction. Typically if changes are made for a child's program/room assignment (rate or discount) after billing occurs the addition or subtraction will have to occur through creating a manual credit/debit on the family's financial ledger.

To see which type of site you have go to Setup > System Config

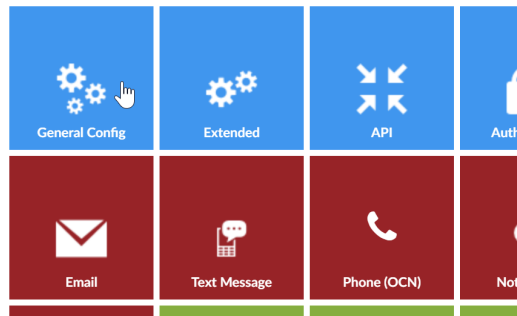
The screenshot shows a software interface with a top navigation bar containing 'Home', 'Family', 'Payments', 'Attendance', 'Lessons', 'Meals', 'Connect', 'Approvals', 'Reports', 'Staff', 'Setup', and a search icon. Below the navigation bar is a 'Home > Information' breadcrumb. The main content area is divided into a left sidebar with various information cards (Information, Schedules, Semester, Birthday, Billing, Pending, Registrations, Changes, New Family, Waitlist, Program Changes, Live Ratios, Scheduled FTE) and a central 'Classroom List' table. The table has columns for 'Center' and 'Classroom' and lists four rows of 'DCW Transactional- Center 1' with different classroom types. A dropdown menu is open over the 'Setup' navigation item, listing options like 'Semester', 'Classroom', 'Classroom Summary', 'Rates', 'Fees', 'Vacation', 'Third Party', 'Schedule', 'Bus', 'Health', 'Checklist', 'Daily Sheets', 'Admins', and 'System Config'. The 'System Config' option is highlighted with a mouse cursor.

Center	Classroom
DCW Transactional- Center 1	AM, Bef
DCW Transactional- Center 1	Flexible
DCW Transactional- Center 1	PM, Aft
DCW Transactional- Center 1	Prescho

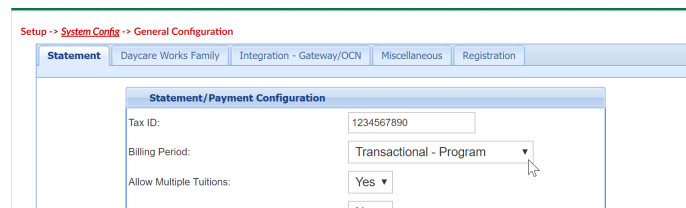
	M	T	W	Th	F
Rates	8	7	8	7	8
Fees	0	0	0	0	0
Vacation	3	3	3	3	3
Third Party	1	1	1	1	1

Then select the General Config option

Setup -> System Config



The billing type that has been set will display in the Billing Period field.



Once billing has been created the type of billing can no longer be changed or updated.

- [Run Transactional Billing](#)
- [Run Defined Billing](#)