

Marking Charge Items as "Ready for Invoice"

Updated Jul 19, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

Here is the new version of this article in the [Veracross Community](#).

Overview

When student charge items are determined to be accurate, they must be flagged to indicate their readiness for invoicing. [Read more about charge item processing.](#)

Identify Candidate Charge Items

Person Charge Item ID	Person	Household	Billing Organization	Current Grade	Catalog Item	AR Invoice Type	School Year	Item Date	Quantity	Default Unit Price	Unit Price	Gross Amount	CR GL Account	Invoice?	Number of Installment	Instal Mont
106341	Brooks, Griffen	Brooks	None	Kinderg...	2 Student Discount	Tuition	14-15	04/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
106342	Brooks, Griffen	Brooks	None	Kinderg...	2 Student Discount	Tuition	14-15	05/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
111918	Wong, Jett	Wong	None	None	2 Student Discount	Tuition	14-15	04/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
111919	Wong, Jett	Wong	None	None	2 Student Discount	Tuition	14-15	05/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input type="checkbox"/>	0	
105196	DuBois, Dagmar	Whitlock	None	Kinderg...	2 Student Discount	Tuition	14-15	02/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
105197	DuBois, Dagmar	Whitlock	None	Kinderg...	2 Student Discount	Tuition	14-15	03/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
105198	DuBois, Dagmar	Whitlock	None	Kinderg...	2 Student Discount	Tuition	14-15	04/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
105199	DuBois, Dagmar	Whitlock	None	Kinderg...	2 Student Discount	Tuition	14-15	05/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
111916	Wong, Jett	Wong	None	None	2 Student Discount	Tuition	14-15	02/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
111917	Wong, Jett	Wong	None	None	2 Student Discount	Tuition	14-15	03/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
113732	Walsh, Giovana	Walsh	None	Kinderg...	2 Student Discount	Tuition	14-15	02/01/15	1.00	5.00	-55.07	-55.07	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
113733	Walsh, Giovana	Walsh	None	Kinderg...	2 Student Discount	Tuition	14-15	03/01/15	1.00	5.00	-55.07	-55.07	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
113734	Walsh, Giovana	Walsh	None	Kinderg...	2 Student Discount	Tuition	14-15	04/01/15	1.00	5.00	-55.07	-55.07	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
113735	Walsh, Giovana	Walsh	None	Kinderg...	2 Student Discount	Tuition	14-15	05/01/15	1.00	5.00	-55.07	-55.07	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
113739	Walsh, Lola	Walsh	None	Kinderg...	2 Student Discount	Tuition	14-15	04/01/15	1.00	5.00	-55.07	-55.07	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
113740	Walsh, Lola	Walsh	None	Kinderg...	2 Student Discount	Tuition	14-15	05/01/15	1.00	5.00	-55.07	-55.07	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
106783	Thompson, C...	Thompson	None	Kinderg...	2 Student Discount	Tuition	14-15	05/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
106780	Thompson, C...	Thompson	None	Kinderg...	2 Student Discount	Tuition	14-15	02/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
106781	Thompson, C...	Thompson	None	Kinderg...	2 Student Discount	Tuition	14-15	03/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
106782	Thompson, C...	Thompson	None	Kinderg...	2 Student Discount	Tuition	14-15	04/01/15	1.00	5.00	-49.50	-49.50	4005-01-01 Sibli...	<input checked="" type="checkbox"/>	0	
SUM										3,906.00		4,783,18...				

To identify candidate charge items, run the **Unposted Student Charges** query on the **Student Billing** homepage. In the results grid, note the **Invoice?** field, which identifies those items that are ready to be invoiced. Charge items can be flagged for invoicing by clicking directly in the "Invoice?" box associated with the appropriate record(s) so that the flag appears with check mark.

Person Charge Item: Brooks, Griffen - Axiom

VC Accounting: ** DEMO **

Student Billing Person Charge Item: Brooks, Griffen

UPDATE

Last Modified: Tue 10:51 am - Sep 27 2016 by @droach Audit Log

GENERAL

PERSON Brooks, Griffen

HOUSEHOLD Brooks

ITEM DATE 04/01/15

SCHOOL YEAR 14-15

CATALOG ITEM 2 Student Discount

CATALOG ITEM DETAIL 267

DESCRIPTION 2 Student Discount K4 - K5

QUANTITY 1.00

DEFAULT UNIT PRICE 5.00

UNIT PRICE -49.50

GROSS AMOUNT -49.50

BILLING ORGANIZATION None

BILLING PERSON None

PROVIDER PERSON None

NUMBER OF INSTALLME... []

INSTALLMENT MONTHS []

CREATE INSTALLMENTS? [NO]

INSTALLMENTS CREATED? [NO]

INVOICE? YES

AR INVOICE 0

AR INVOICE ITEM 0

DO NOT POST? [NO]

POSTED? [NO]

PROCESSING DATE []

PROJECT # 00000-000: *** none *

CLASS :-<None>

PROGRAM/SUBJECT <None Specified>

LEGACY CODE []

The "Invoice?" field is also available on the Charge Item Detail screen. To find it there, click the **Person Charge Item ID** link on the Unposted Student Charges results grid. The field appears on the General tab.

Batch Process

Process Existing Charges - Axiom

VC Accounting: ** DEMO **

Student Billing Process Existing Charges

ADD PROCESS EXISTING CHARGES

Audit Log

GENERAL

**** Use Option Codes (2, 3, or 4) ****

OPTION CODE 4 - Mark "Ready for Invoice"

SCHOOL YEAR None

AR INVOICE TYPE None

**** Criteria ****

BEGIN ITEM DATE []

END ITEM DATE []

BEGIN GRADE None

END GRADE None

BEGIN GRADE APPLY FOR None

END GRADE APPLY FOR None

HOUSEHOLD []

STUDENT []

STUDENT NAME []

CATALOG ITEM *** none ***

CATALOG ITEM (DETAIL) 0

PAYMENT FREQUENCY None

ENROLLMENT STATUS N/A

STUDENT BILLING CODE None

If your student enrollment is large and many students have several charge items (with some items being split into multiple installments), there will be hundreds or even thousands of charge items to process. Marking each item manually is not feasible. So, Veracross offers a batch process that allow bulk marking of charge items.

To do so, click on the **Process Existing Charges** link found on either the **Student Billing** or **Accounts Receivable** homepage, under the Charge/AR Processing section.

When creating installment charges, select **Option 4 - Mark "Ready for Invoice"** Fill in the relevant

data and click **Add Process Existing Charges**.
