MANAGING EZIDEBIT

Ezidebit requires regular oversight to keep on top of students direct debits. Add the following tasks to your weekly list.

Check Ezidebit 'Failed Payments' every weekday morning

-> login to Ezidebit which takes you to the dashboard, click on the 'View All>>' button next to 'Failed Payments'
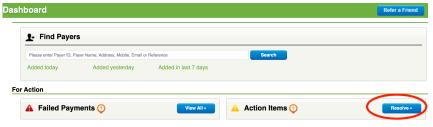

-> The next page will give you a list of all missed payments by students, if you click on a missed payment it will take you to the individual students Ezidebit account to view their full history

-> If you have any new missed payments for the day follow the 'Arrears' procedure and send out relevant arrears emails. You can also text them to notify you have sent them an email regarding their account (so the 'I never got that email' excuse can't be used)

Check Ezidebit 'Action Items' every weekday morning

-> login to Ezidebit which takes you to the dashboard, click on the 'Resolve>>' button next to 'Action Items'

-> The next page will give you a list of accounts requiring action, use this screen as a daily reminder of outstanding issues and to keep an eye on things as automated emails can sometime be missed

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Action Items

Current Payer Issues

Display `100 ⬍` results per page

| `4` Pending: All `▾` | `0` Hold: All `▾` | | | | `4` Total |

Displaying 1 - 4 of 4 results

Status	Issue	Payer	Ezidebit Payer ID	Issue Date ▲
🔵	Hold - Awaiting Signature	Jane Doe (DOE6388195)		29/10/2019
🔵	Hold - Awaiting Signature	John Smith (SMITH6345222)		04/12/2019
🔵	Hold - Awaiting Signature	Karen Barnes (BARNES6345444)		13/01/2020
🔵	Hold - Awaiting Signature	Kate Brown (BROWN6345656)		14/01/2020

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Invoicing

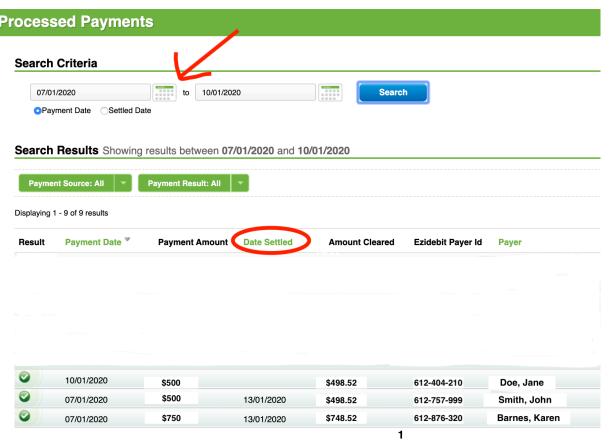If you are invoicing your students (which you should be) like we invoice you, here are our suggested steps:

-> Go to 'Payments' along the top of the Ezidebit menu and select 'Processed Payments'

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-> Enter the dates you wish to do the invoicing for (arrow on pic) we try to do them weekly

-> Once search results come up check that the dates you have searched have been settled. In the pic I have circled the 'Date Settled' column, you can see how transactions on the 07/01/20 have a settlement date and the one on the 10/01/20 does not. This means that any transactions from the 10/01/20 onwards have not yet settled.

-> If there are unsettled dates go back to the 'Search Criteria' and change it, in my example I would change it to an end date of 07/01/20 as that is the last date settled (realistically your from date in this case would probably be 01/01/20 if you were doing it weekly)

-> The search results will then leave you with all settled payments

-> The from date will always be from the last invoice date. So if last week you invoiced all 'Date Settled' payments from 25/12/19 to 31/12/19 today you would enter 01/01/20 to 07/01/20 this ensures you don't miss any

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Processed Payments

Search Criteria

| 07/01/2020 | 📅 | to | 10/01/2020 | 📅 | **Search** |

◉ Payment Date ○ Settled Date

Search Results Showing results between **07/01/2020** and **10/01/2020**

| Payment Source: All ▾ | Payment Result: All ▾ |

Displaying 1 - 9 of 9 results

Result	Payment Date ▾	Payment Amount	Date Settled	Amount Cleared	Ezidebit Payer Id	Payer
✓	10/01/2020	$500		$498.52	612-404-210	Doe, Jane
✓	07/01/2020	$500	13/01/2020	$498.52	612-757-999	Smith, John
✓	07/01/2020	$750	13/01/2020	$748.52	612-876-320	Barnes, Karen

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-> Next I print this report (just by going file -> print in the browser). I vertically put a line through the Date Settled and Amount Cleared columns as they are not used in the invoices and we don't want to accidently type those.

-> The information on this print out now gives us everything we need to do the invoicing NAME, DATE, AMOUNT

-> Be aware though that not all payments listed are successful like the ones above that are green with the green tick. There are also failed payments which are not to be invoiced. Use this print out as a way to double check that you have actioned all failed payments. They look like this on the print out:

| ✗ | 16/12/2019 | $500 | | -$1.10 | 327-287-0! |

-> When I'm invoicing I highlight each line as it is done. Once complete file this print out into a designated 'Invoices Entered' folder, this way you can always go back and see where you last finished the invoicing plus you can also use this for future reference which sometimes comes in handy!

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