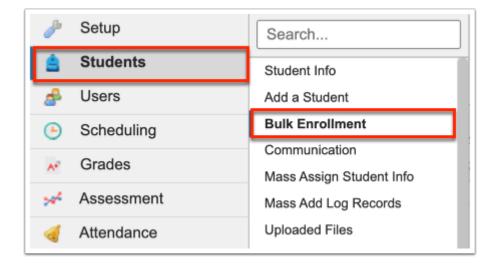
Bulk Enrollment

The Bulk Enrollment screen allows post secondary schools to automatically schedule and automatically bill students using the Add a Student process in the Bulk Enrollment setup. Once the process is complete: An Order is started and placed, and students are added, the added students are automatically invoiced; the invoice displays via Billing > <u>Student Billing</u> > <u>Customer Ledger</u>.

Bulk Billing & Enrollment

1. In the Students menu, click Bulk Enrollment.



The **Start Orders** tab is selected by default, which allows post secondary schools to create a bulk enrollment/ bulk bill order.

F		Writers02	Select Student/Staff v	Bulk Enrollment	Lizet	tte Garcia		tion - 9103 ▼ ▼ Term D ▼	
<i>»</i>	Sta	art Orders	Order History						
\$	Exp	port 🛐 🚔	Filter: OFF						
•		Order Created 🛓	Order Name 🛓	School / Campus 🛓	Funding Source 🛓	Form	n of Payment 🛔 🤇	Cost Tier 🛓	
A*								V	
*									

Be sure the correct school is selected from the school pull-down located in the header, if you have access to multiple schools.

re	Select Stude	nt/Staff ▼ Bulk Enr	ollment		Lizette Vigil	Focus Technical 2022-2023 ▼	College ▼ s
Sta	rt Orders	Order History					
Exp	ort 🐴 븕	Filter: OFF					
	Order Created 🛓	Order Name 💂	School / Campus 🛓	Funding Source 💂	Form of Payment 🛓	Cost Tier 🛓	
			T		T		
	02/22/2023	Math	Blonde High School	Blonde High School	Voucher	Non Resi 🔽	View Order Item
		ABE Reading	Pink High School	Pink High School	Check	Resident v	View Order Item

2. Enter the Order Name in the provided text box.

xpc	rt 🖺 븕	Filter: OFF					
	Order Created 🛓	Order Name 💂	School / Campus 🛓	Funding Source 🛓	Form of Payment $\frac{A}{V}$	Cost Tier 🛓	
		Bulk 05/2023			T		
-	02/22/2023	Math	Blonde High School	Blonde High School	Voucher	Non Resi 🔻	View Order Items
-	02/22/2023	ABE Reading	Pink High School	Pink High School	Check	Resident v	View Order Items

3. Select the School / Campus from the pull-down.

ita	rt Orders	Order History					
хр	ort 🖺 블	Filter: OFF					
	Order Created $\frac{\mathtt{A}}{\mathtt{V}}$	Order Name 🛓	School / Campus 🛓	Funding Source 🛓	Form of Payment $\frac{A}{V}$	Cost Tier 🛓	
		Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	V		
-	02/22/2023	Math	Blonde High School	Blonde High School	Voucher v	Non Resi 🔻	View Order Items
02/22/2023		ABE Reading	Pink High School	Pink High School	Check	Resident v	View Order Item

The School/Campus pull-down displays the schools set up in Setup > <u>External Schools</u>.

4. Select the applicable **Funding Source** from the pull-down.

	Orders	Order History					
роі	rt 🖺 🚔	Filter: OFF					
Order Created		Order Name 🛓	School / Campus 🛓	Funding Source 💂	Form of Payment 🛔	Cost Tier 🛓	
		Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	V		
. (02/22/2023	Math	Blonde High School	Blonde High School	Voucher	Non Resi 🔻	View Order Iter
. (02/22/2023	ABE Reading	Pink High School	Pink High School	Check	Resident V	View Order Iter

5. Select the Form of Payment from the pull-down.

Lai	rt Orders	Order History					
хр	ort 🖺 🚔	Filter: OFF					
Order Created		Order Name 🛓	School / Campus 🛓	Funding Source 🛓	Form of Payment $\frac{1}{7}$	Cost Tier 🛓	
		Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	Check		
-	02/22/2023	Math	Blonde High School	Blonde High School	Voucher	Non Resi 🔻	View Order Item
-	02/22/2023	ABE Reading	Pink High School	Pink High School	Check	Resident v	View Order Item

6. Select the applicable **Cost Tier** from the pull-down.

ta	t Orders	Order History					
хр	ort 🐴 🚔	Filter: OFF					
Order Created		Order Name 🛓	School / Campus 🛓	Funding Source 🛓	Form of Payment $\frac{\mathtt{A}}{\mathtt{V}}$	Cost Tier 🛓	
		Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	Check	Resident 🔻	
-	02/22/2023	Math	Blonde High School	Blonde High School	Voucher	Non Resi 🔻	View Order Item
-	02/22/2023	ABE Reading	Pink High School	Pink High School	Check v	Resident v	View Order Item

• Cost Tiers are set up via Billing > <u>Cost Tier Setup</u>.

7. Press the **Enter** key to save the line of data.

Stai	rt Orders	Order History					
Ехро	ort 🖏 블	Filter: OFF					
	Order Created $\frac{\mathtt{A}}{\mathtt{V}}$	Order Name 🛓	School / Campus 🛓	Funding Source 💂	Form of Payment $\frac{A}{V}$	Cost Tier 🛓	
		Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	Check	Resident V	
-	02/22/2023	Math	Blonde High School	Blonde High School	Voucher	Non Resi 🔻	View Order Items
02/22/2023		ABE Reading	Pink High School	Pink High School	Check	Resident	View Order Items

Sta	rt Orders	Order History					
Ехр	ort 🖺 블	Filter: OFF					
	Order Created $\frac{\mathtt{A}}{\mathtt{V}}$	Order Name 🛓	School / Campus 🛓	Funding Source 🛓	Form of Payment $\frac{\mathtt{A}}{\mathtt{V}}$	Cost Tier 🛓	
			V		V	•	
-	05/02/2023	Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	Check	Resident V	View Order Item
-	02/22/2023	Math	Blonde High School	Blonde High School	Voucher v	Non Resi 🔻	View Order Item
	02/22/2023	ABE Reading	Pink High School	Pink High School	Check V	Resident V	View Order Item

The **Order Created** date displays once the information is displayed.

The orders displays on the **Start Orders** tab until the order is placed.

8. Click View Order Items to enroll and bill for a selected course.

ita	rt Orders	Order History					
хр	ort 🛐 🚔	Filter: OFF					
	Order Created $\frac{A}{V}$	Order Name 🛓	School / Campus 🛓	Funding Source 🛓	Form of Payment $\frac{A}{V}$	Cost Tier 🛓	
					V		
-	05/02/2023	Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	Check	Resident 🔻	View Order Item
-	02/22/2023	Math	Blonde High School	Blonde High School	Voucher v	Non Resi	View Order Item
-	02/22/2023	ABE Reading	Pink High School	Pink High School	Check 🔻	Resident V	View Order Item

The **Order Items** tab displays including the Order Created date, Invoice Number, Order Status, School/Campus, Funding Source, Form of Payment, and the Cost Tier.

Write		ent/Staff ▼	Bulk Enroll	ment				Lizette Vigil	Focus Technica 2022-2023 ▼	I College ▼ Si Term 2 ▼ Ef	
nt 🎤	Start Orders	Order History	Order Ite	ms					2022-2023		Livi
ŝ		,									
₽ 					Dulle)5/2023					
 ► 					Buik	5/2023					
*	Order Created	Invoice Numb	er Order St	tatus	School/Ca	mpus	Funding Sou	irce	Form of Paymen	t Cost Tie	r
-	05/02/2023	4	In Progr	ess: 05/02/2023	Enthusias	m High School	Enthusiasm	High School	Check	Residen	t
7	Export 🐴 🚔	Filter: OFF									
	Format 🖕	Course Type 🛓	Course 🛓	Total Quantity 🛓	Unit Price (\$) 🛓	Total Price (\$) 🛔	Start Date 🛓	End Date 🛓	Shipping Status 🛓	Substitute 🛓	
9	Print	CBE					05/02/2023	11/02/2023	In Process		▼
2			Total:	0		0.00					
٦					Plac	e Order					
8					Plac	eorder					

9. Select the **Format** from the pull-down; options includes Print (Tied to Print CBE) and Online (Tied to courses or CBE).

Exp	ort 🖺 블	Filter: OFF										
	Format 🛔	Course Type 🛓	Course 💂		Total Quantity 🛓	Unit Price (\$) 🛔	Total Price (\$) 🛔	Start Date 🛓	End Date 💂	Shipping Status 🛔	Substitute 🖕	
	Print CBE ABE LANG Image: CBE O2/22/2023 O8/22/2023 In Process Image: CBE Image: CBE											
	Total: 0 0.00											
	Place Order											

The Course Type defaults to CBE.

The Course Type is unique to Texas and displays as either CBE (Credit By Exam) or Print.

10. Select the applicable **Course** from the pull-down.

F	Format 븆	Course Type 🛓	Course 🛓		Total Quantity 🛔	Unit Price (\$) 🛔	Total Price (\$) 🛔	Start Date 🛓	End Date 💂	Shipping Status 🛓	Substitute 🛔
	Print	CBE	ABE LANG					02/22/2023	08/22/2023	In Process	
Г				Total:	0		0.00				

•	This field is not required. If a selection is not made, only an enrollment record will be created.
•	The courses displayed in the pull-down populate from Scheduling > <u>Courses &</u> <u>Sections</u> .
(The section/course to which the students are enrolled depends on the system preference enabled via Setup > <u>System Preferences</u> > School Preferences / Default School Preferences > <u>Scheduling</u> tab: Schedule the section with the most available seats for each course in Bulk Create Students .
	When enabled, you can select the course from the Enroll in Course pull-down. When disabled, you can select the section from the Enroll in Section pull-down.

11. Enter the **Total Quantity** in the provided text box; i.e. the total number of students being enrolled.

Order Created	Invoice Num	ber	Order Stat	us	School/Ca	mpus	Funding	Source	Form	of Payı	ment	Cost Tier
02/22/2023 1			In Progress: 02/22/2023		Enthusias	Enthusiasm High School Ent		Enthusiasm High School		PO		Resident
	Filter: OFF	Course 1		Total Quantity 🛔	Unit Price (\$) 🛔	Total Price (\$) 🛔	Start Date ≜	End Date 🛔	Shipping Sta	tus 🛔	Substitute	A
Format 🛊	Course Type 🛓	Course 🛓		Total Quantity 🛓	Unit Price (\$) 🛓	Total Price (\$) ♣	Start Date 🛓	End Date 🛓	Shipping Sta	tus 🛓	Substitute	× v
		Course 🛔		Total Quantity $rac{4}{r}$	Unit Price (\$) 🛓	Total Price (\$) 🛔	Start Date [▲]	End Date 🛓 08/22/2023	Shipping Sta		Substitute	÷ 🔹

12. Enter the Start Date and End Date for enrollment.

xport → Filter: OFF Format ↓ Course Type ↓ Course ↓ Total Quantity ↓ Unit Price (\$) ↓ Start Date ↓ End Date ↓ Shipping Status ↓ Substitute ↓									

13. Select the **Shipping Status** from the pull-down. Options include: N/A, In Process, Shipped, and Delivered. The pull-down reflects the the status of shipped print materials, if applicable to the course.

Ехроі	rt 🖺 븕 🖡	Filter: OFF									
I	Format 🛔	Course Type 🛔	Course 🛓		Total Quantity 🛓	Unit Price (\$) $\frac{4}{7}$	Total Price (\$) 🛔	Start Date 🛓	End Date 💂	Shipping Status 🛓	Substitute 💂
(Print 🔽	CBE	ABE LANG	V	5			02/22/2023	08/22/2023	In Process	
				Total:	0		0.00				
					-	Pla	ce Order			1	1

14. Select the **Substitute** course from the pull-down to swap out the subject of a purchase with a different course tied to the same format and type.

Ехро	ort 🖹 📑	Filter: OFF									
	Format 🛔	Course Type 🛓	Course 🛓		Total Quantity 🛔	Unit Price (\$) 🛔	Total Price (\$) 🛔	Start Date 🛓	End Date 💂	Shipping Status 🛔	Substitute 🛓
	Print 🔽	CBE	ABE LANG	V	5			02/22/2023	08/22/2023	In Process	ABE LANG
				Total:	0		0.00				
						Pla	ce Order				

15. Press the **Enter** key to save the line of data.

хро	ort 🖺 븕 🗍	Filter: OFF									
	Format 🖕	Course Type 🛓	Course 🛓		Total Quantity 🛓	Unit Price (\$) 🛔	Total Price (\$) 🛔	Start Date 🛓	End Date 🛓	Shipping Status 🛓	Substitute 🛓
	Print 💌	CBE		V				02/22/2023	08/22/2023	In Process	
-	Print 🔻	CBE	ABE LANG	V	5	100.00	500.00	02/22/2023	08/22/2023	In Process	ABE LANG
				Total:	5		500.00				

The **Unit Price (\$)** and **Total Price (\$)** automatically calculate and display.

Ехро	rt 🖺 븕 🛛	Filter: OFF									
	Format 🛔	Course Type 🛔	Course 🛓		Total Quantity 🛔	Unit Price (\$) 🛔	Total Price (\$) $\frac{1}{7}$	Start Date 🛓	End Date 🛓	Shipping Status 🛔	Substitute 🛓
	Print 🔽	CBE		V				02/22/2023	08/22/2023	In Process	
-	Print 🔽	CBE	ABE LANG	V	5	100.00	500.00	02/22/2023	08/22/2023	In Process	ABE LANG
				Total:	5		500.00				

16. Add additional courses using the top line, as needed.

Exp	ort 🖺 븕	Filter: OFF									
	Format 🛔	Course Type 🛓	Course 🛓		Total Quantity 🛔	Unit Price (\$) 🛓	Total Price (\$) 🛓	Start Date 🛓	End Date 🛓	Shipping Status 🛓	Substitute 🛓
	Print 🔻	CBE	ABE READ					02/22/2023	08/22/2023	In Process	
-	Print 🔽	CBE	ABE LANG	V	5	100.00	500.00	02/22/2023	08/22/2023	In Process	ABE LANG
				Total:	5		500.00				

17. Click Place Order.

Order	Created	Invoice Num	ber Order St	atus	School/Ca	mpus	Funding S	ource	Form of Pay	ment	Cost Tier
02/22/	2023	1	In Progr	ess: 02/22/2023	Enthusiasm High School		Enthusias	Enthusiasm High School			Resident
Form		Course Type 🖕	ABE READ	•		Total Price (\$) 💂		End Date 🔹	Shipping Status		v
Print		CBE					02/22/2023	08/22/2023	In Process		
		CBE	ABE LANG	5	100.00	500.00	02/22/2023	08/22/2023	In Process	ABE LAN	G
Print				: 5		500.00					

Once your order has been placed, you can begin adding students.

18. Click Add a Student.

				Bulk	05/2023						
Order Created Invoice Nur		ice Number	Order Status	School/Cam	npus	Funding	Source	Fo	orm of Pay	ment	Cost Tier
05/02/2023	4		Placed: 05/02/2023	Enthusiasm	nthusiasm High School Enthus		sm High Scho	col C	Check		Resident
port 🖳 븕	Filter:	OFF									
		Total Quantity 🛔	Quantity Remaining $\frac{4}{7}$	Unit Price (\$) 🛔	Total Price (\$) 🛔	Start Date 🛓	End Date 💂	Shipping Sta	tus 🛔 Sub	stitute 🛓	
Course Type	Course 🚽			100.00	500.00	2023-05-02	2023-11-02	In Process	AB	ELANG	Add a Studer
Course Type	ABE LANG	5	5	100.00							
			5 5	100.00	500.00						

Follow the steps listed in <u>Add a Student</u>.

Start Orders Drafts

If an order was started and not placed as described in <u>Bulk Billing & Enrollment</u>, it will display on the Start Orders tab where it can be edited, as needed.

1. In the **Students** menu, click **Bulk Enrollment**.

Þ	Setup	Search
â	Students	Student Info
\$	Users	Add a Student
٩	Scheduling	Bulk Enrollment
٨÷	Grades	Mass Assign Student Info Mass Add Log Records
*	Assessment	Uploaded Files

The **Start Orders** tab is selected by default, which displays started orders.

F	?	SWriters02	Select Student/Staff V	Bulk Enrollment	Lizette	Garcia	Adult Educat 2022-2023		SIS ERP
<i>}</i>	s	Start Orders	Order History						
- &		xport 🐴 븕	Filter: OFF						
•		Order Created	Order Name 🖕	School / Campus 🛓	Funding Source 🛓	Form	of Payment 🛔 🤇	Cost Tier 🛔	
**								V	
*									

2. Click the Order Name to edit the name. Click the pull-downs to change the selection made, such as School / Campus. Funding Source, Form of Payment, and Cost Tier.

rt Orders	Order History					
ort 🐴 🚔	Filter: OFF					
Order Created $\frac{\mathtt{A}}{\mathtt{V}}$	Order Name 🛓	School / Campus 🛓	Funding Source 🛓	Form of Payment 🛓	Cost Tier 🛓	
02/22/2023	ABE Reading	Pink High School	Pink High School	Check	Resident V	View Order Items
02/22/2023	Math	Filter	Blonde High School	Voucher	Non Resi 🔽	View Order Items
		Birthday High School				
		Blonde High School				
		Curb Middle/High School				
		Enthusiasm High School				
		Pink High School				
	ort 强 🚔 🚺	ort 🗟 📄 Filter: OFF Order Created 🛊 Order Name 🛊 02/22/2023 ABE Reading	ort Image: School of Campus in the school of Cam	ort Image: School / Campus + Funding Source + Order Created + Order Name + School / Campus + Funding Source + 02/22/2023 ABE Reading Pink High School Image: School / 02/22/2023 Math Filter Bionde High School Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School / Image: School /	ort Image: School / Campus & Funding Source & Form of Payment & Form of	ort (1) Filter: OFF Order Created (2) Order Name (2) School / Campus (2) Funding Source (2) O2/22/2023 ABE Reading Pink High School V O2/22/2023 Math Filter Filter Bionde High School Voucher Non Resi (2)

Changes save automatically.

3. Click the **delete** button (red minus sign) to delete the order.

Sta	art Orders	Order History		
Exp	port 🖺 븕	Filter: OFF		
	Order Created 🛓	Order Name 🛓	School / Campus 🛓	Funding Source 🛓
	02/22/2023	ABE Reading	Pink High School	Pink High School
-	02/22/2023	Math	Blonde High School	Blonde High School

4. Click **View Order Items** to add the course and place the order.

tart Orders	Order History					
xport 🐴 븕	Filter: OFF					
Order Created	l ♣ Order Name ♣	School / Campus 🛓	Funding Source 🛓	Form of Payment 🛔	Cost Tier 🛓	
02/22/2023	ABE Reading	Pink High School	Pink High School	Check 🔽	Resident	View Order Item
02/22/2023	Math	Blonde High School	Blonde High School	Voucher 🔽	Non Resi 🔻	View Order Item

Follow the steps described in <u>Bulk Billing & Enrollment</u> to complete the order.

					AB	E F	Reading						
Order Created	Invoice N	umber C	Order	Status	7.0		hool/Campus		Funding	Source	Form of Paymen	t	Cost Tier
02/22/2023	3	h	n Pro	gress: 02/22/202	3	Pir	nk High School		Pink Hig	h School	Check		Resident
ort 🖳 븕	Filter: OFF	Course 🛓		Total Quantity 🛔	Unit Price (\$) ≜	Total Price (\$) 🛔	Start D	ate 🛔	End Date 🛔	Shipping Status 🛔	Substitut	e 🛓
	CBE	•					•	02/22		08/22/2023	In Process		•
Print 🔻												<u> </u>	

Order History

The Order History tab allows users to view all orders for bulk billing and enrollment placed and in progress (not yet placed from the Start Orders tab).

1. In the **Students** menu, click **Bulk Enrollment**.

Þ	Setup	Search
ŝ	Students	Student Info
æ	Users	Add a Student
	Scheduling	Bulk Enrollment
A*	Grades	Mass Assign Student Info Mass Add Log Records
*	Assessment	Uploaded Files

2. Click the Order History tab.

Write		udent/Staff ▼	Bulk Enro	llment			Lizette	Focus Technical	College 🔻	SIS
scurr nt				hinene				2022-2023 V	Term 2 🔻	ERP
P	Start Orders	Order History	<i>,</i>							
٢										
\$	Order Status		Fo	rm of Payment	V					
٩										
A**	School / Camp	2L		F	unding Source		•			
*										
-	From Date	05/02/2023		To Date	11/02/2023		Invoice Number			
9										
	Search									
9	Export 🐴 🚔	Filter: OFF								
12	Order Created &	Invoice Number 🛓	Order Status 🛔	Order Name 🛓	School / Campus 🛓		Funding Source 🛔	Form of Payment 🛔		
7	05/02/2023	4	Placed	Bulk 05/2023	Enthusiasm High Schoo	I	Enthusiasm High School	Check	View Order It	ems
1										

Use the provided filters to pull the Order History report.

Write scurr nt		udent/Staff 🔻	Bulk Enro	ollment		Lizette Vigil	Focus Technical 2022-2023 ▼	
P	Start Orders	Order Histor	y					
٨								
\$	Order Status	Placed	Fo	rm of Payment	V			
۲								
A.ª	School / Camp	us		Fundir	ng Source	V		
*								
-	From Date	04/04/2023		To Date 11/	/02/2023	Invoice Number		
9								
	Search							
	Jearch							
9	Export 🖳 🚔	Filter: OFF						
120		Invoice Number 🛔	Order Status 🛔	Order Name	School / Campus 🛓	Funding Source	Form of Payment 🛔	
7	05/02/2023	4	Placed	Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	Check	View Order Items
4								

All filters are optional.

3. Select the **Order Status** from the pull-down to determine which orders will be pulled into the report.

4. Select the **Form of Payment** from the pull-down to determine which orders will be pulled into the report.

Order Status	Placed	For	rm of Payment	°0 🔽			
School / Campu	S		Fun	ding Source	V		
From Date	02/20/2023		To Date 0	3/01/2023	Invoice Number		
Search							
(port 🖺 븕	Filter: OFF						
rder Created 🛔	Invoice Number 🛔	Order Status 🛔	Order Name 🛓	School / Campus 🛓	Funding Source 🛔	Form of Payment 🛔	
	1	Placed	Bulk 02/2023	Enthusiasm High School	Enthusiasm High School	PO	View Order Iter

5. Select the **School/Campus** from the pull-down to determine which orders will be pulled into the report.

6. Select the **Funding Source** from the pull-down to determine which orders will be pulled into the report.

Start Orders	Order History	/						
Order Status	In Progress	Fo	rm of Payment		V			
School / Campu	Pink High S	School		Funding	Source Pink High	School		
From Date	02/20/2023		To Date	03/01	1/2023	Invoice Number	r	
Search	Filter: OFF							
		Order Status 🛓	Order Name 🛓		School / Campus 🛓	Funding Source 🛔	Form of Payment 🛔	
02/22/2023	3	In Progress	ABE Reading		Pink High School	Pink High School	Check	View Order Iter

7. Enter or select the **From Date** and **To Date** to pull orders created over a specific date range. Note: You can enter a From Date and/or a To Date. Both are not required.

Start Orders	Order Histor	y											
Order Status	In Progress	Fo	rm of Payment					V					
School / Campu	Pink High S	School	V	Fundin	g Sourc	ce	Pink I	High S	Schoo	I	V		
From Date	02/20/2023		To Date	03/0)1/202	23				Invoi	ce Number		
				•	Ма	rch	~	2023	3 🗸	Þ			
Search				Sun	Mon	Tue	Wed	Thu 2	Fri 3	Sat 4			
xport 🐴 븕	Filter: OFF			5	6	7	8	9	10	11			
Order Created 🛔	Invoice Number 🛔	Order Status 🛓	Order Name	12 19	13 20	14 21	15 22	16 23	17 24	18 25	Source 🛔	Form of Payment 🛓	
	2	In Progress	Math	26	27	28	29	30	31		igh School	Voucher	View Order Iten
02/22/2023													

8. To search for orders by **Invoice Number**, enter the number in the provided text box.

itart Orders	Order Histor	y						
Order Status	In Progress	For	rm of Payment		V			
School / Camp	Pink High S	School		Funding Source	Pink High Sch	hool		
From Date	02/20/2023		To Date	03/01/2023		Invoice Number	3	
Search xport 🙉 🚔 Order Created 🖕	Filter: OFF	Order Status 🛓	Order Name ≰	School /	Campus 🛓	Funding Source 🛓	Form of Payment 🖕	

9. Click Search.

Start Orders	Order History		
Order Status		Form of Payment	
School / Campu	15	Funding Source	
From Date	02/20/2023	To Date 03/01/2023 Invoice Number	
Search			

The Order History displays Order Created, Invoice Number, Order Status, Order Name, School / Campus, Funding Source, and Form of Payment.

Export 🐴 🚔	Filter: OFF						
Order Created 🛔	Invoice Number 🛓	Order Status 🛓	Order Name 🛔	School / Campus 🛓	Funding Source 🛓	Form of Payment $\stackrel{\blacktriangle}{\blacksquare}$	
02/22/2023	1	Placed	Bulk 02/2023	Enthusiasm High School	Enthusiasm High School	PO	View Order Iten
02/22/2023	2	In Progress	Math	Blonde High School	Blonde High School	Voucher	View Order Iten
02/22/2023	3	In Progress	ABE Reading	Pink High School	Pink High School	Check	View Order Iten

10. Click **View Order Items** to view the details of the order (bulk billing/enrollment details) and to add details, such as the Course and students.

Export 🐴 🚔	Filter: OFF						
Order Created 🛓	Invoice Number 🛓	Order Status 🛓	Order Name 🛔	School / Campus 🛓	Funding Source 💂	Form of Payment $\stackrel{\blacktriangle}{\blacksquare}$	
02/22/2023	1	Placed	Bulk 02/2023	Enthusiasm High School	Enthusiasm High School	PO	View Order Iten
02/22/2023	2	In Progress	Math	Blonde High School	Blonde High School	Voucher	View Order Iten
02/22/2023	3	In Progress	ABE Reading	Pink High School	Pink High School	Check	View Order Item

To finish an order, see <u>Bulk Billing & Enrollment</u> for details.

					м	ath						
Order Created	Invoice Numb	er Orde	r Status		School/		Funding Source		Form o	f Payment	Co	st Tier
02/22/2023	2 In Progress: 02/23/2023		23	Blonde	High School	Blonde High Sc	hool	Vouche	ər	No	n Resident	
ort 🖳 🚔	Filter: OFF Course Type 🛓	Course 🛓	Total Quantity 🛔	Unit P	Price (\$) 🛓	Total Price (\$) 🛔	Start Date ≰	End Dat	e≰	Shipping Stat	us 🛔	Substitute
Print	CBE						02/23/2023	08/23/	2023	In Process	V	
		Total:	0			0.00						
		Iotal:	0			0.00						

Additional Features

Begin typing the name or number of the desired field in the **Filter** text box located at the top of each pull-down for a quick search.

Start Orders	Order History
Order Status	Placed Form of Payment
School / Campu	Funding Source
From Date	04 Birthday High School ate 11/02/2023
	Blonde High School
	Curb Middle/High School
Search	

Click the **Excel** icon in the Export section to export the table of data to an Excel spreadsheet, which is saved to your computer.

Click the **Printer** icon to print the table of data.

From Date	02/01/2023		To Date	08/27/202	3	Invoice Number	
Search							
Export 🖺 🚍	Filter: OFF						
	Filter: OFF	Order Status 🛓	Order Name 🛓		School / Campus 🛓		Funding Source 🛓
		Order Status 🛓 Placed	Order Name 🛓 Bulk 02/2023		School / Campus ♣ Enthusiasm High Sch	ool	Funding Source Enthusiasm High School
Order Created 🛓	Invoice Number 🖕	•	•		•	ool	•

Click **Filters** to further breakdown data.

- **a.** To add more than one filter to a column, click on the **green plus sign**.
- **b.** To delete an added filter, click on the **red minus sign**.
- **c.** Select the **gray arrow** for more filtering options.

T	C V	🕒 pro 🔻	(• • • • • • • • • • • • • • • • • • •	T	
				Contains	Not			
		-		Equals	Not			
Order Created 🛔	Invoice Number 🛔	Order Status 🛔	Order Name 💂	Starts with	Not	Funding Source 🛓	Form of Payment 🛔	
02/22/2023	2	In Progress	Math	Ends with	Not	Blonde High School	Voucher	View Order Items
02/22/2023	3	In Progress	ABE Reading	Has value	Not	Pink High School	Check	View Order Items
02/22/2023	5	III FIOgress	Aber Reading	Greater	Not	Fink Figh School	CHECK	view order items
				Greater or equal	Not			
				Less	Not			
				Less or equal	Not			
				Between	Not			

See <u>Filters</u> for more information.

You can sort data by clicking on any of the headers. Click once for ascending results; click twice for descending results.

Export 🖺 븕	Filter: OFF						
Order Created 🛔	Invoice Number 🛔	Order Status 🛔	Order Name 🛓	School / Campus 🛓	Funding Source 🛓	Form of Payment 🛔	
02/22/2023	1	Placed	Bulk 02/2023	Enthusiasm High School	Enthusiasm High School	PO	View Order Ite
02/22/2023	2	In Progress	Math	Blonde High School	Blonde High School	Voucher	View Order Ite
02/22/2023	3	In Progress	ABE Reading	Pink High School	Pink High School	Check	View Order Ite