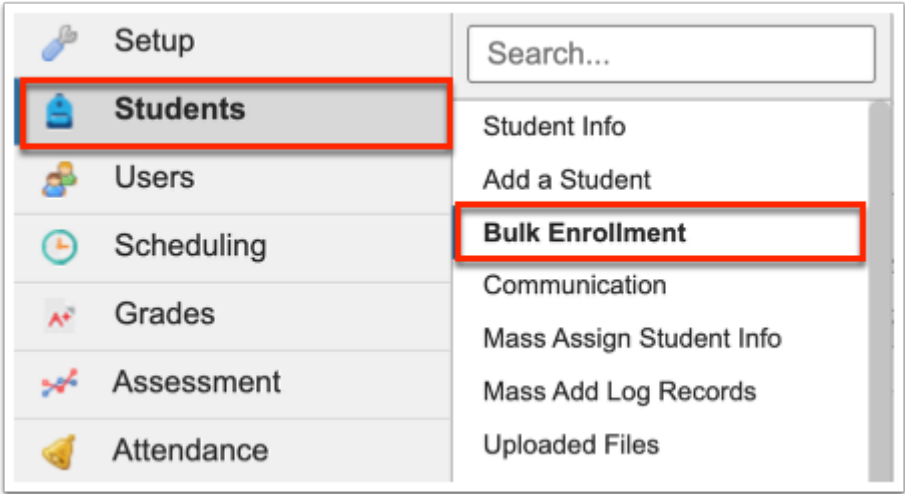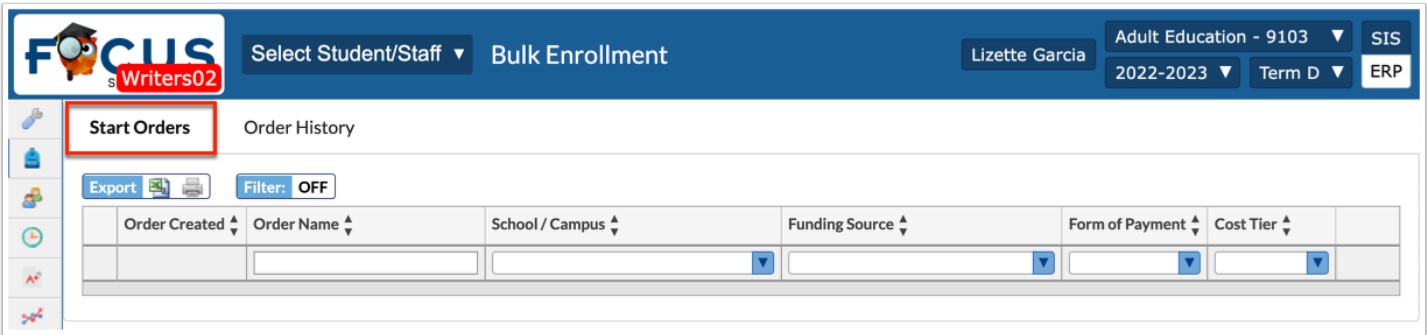# Bulk Enrollment

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 > [Student Billing](#) > [Customer Ledger](#).

## 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.

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



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

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

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



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



ℹ️ Cost Tiers are set up via Billing > Cost Tier Setup.

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

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

ℹ 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.



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.

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



The Course Type defaults to CBE.

> ℹ️ 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.

> ℹ️ This field is not required. If a selection is not made, only an enrollment record will be created.

> ℹ️ The courses displayed in the pull-down populate from Scheduling > Courses & Sections.

> ℹ️ The section/course to which the students are enrolled depends on the system preference enabled via Setup > System Preferences > School Preferences / Default School Preferences > Scheduling 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.

### Bulk 02/2023

| Order Created | Invoice Number | Order Status | School/Campus | Funding Source | Form of Payment | Cost Tier |
|---|---|---|---|---|---|---|
| 02/22/2023 | 1 | In Progress: 02/22/2023 | Enthusiasm High School | Enthusiasm High School | PO | Resident |

Export 📊 🖨️  Filter: OFF

| Format | Course Type | Course | Total Quantity | Unit Price ($) | Total Price ($) | Start Date | End Date | Shipping Status | Substitute |
|---|---|---|---|---|---|---|---|---|---|
| Print ▼ | CBE | ABE LANG ▼ | 5 | | | 02/22/2023 | 08/22/2023 | In Process ▼ | ▼ |
| | | Total: | 0 | | 0.00 | | | | |

**Place Order**

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

| Export 📊 🖨 | Filter: OFF | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Format ⬍ | Course Type ⬍ | Course ⬍ | Total Quantity ⬍ | Unit Price ($) ⬍ | Total Price ($) ⬍ | Start Date ⬍ | End Date ⬍ | Shipping Status ⬍ | Substitute ⬍ |
| | Print ▼ | CBE | ABE LANG ▼ | 5 | | | 02/22/2023 | 08/22/2023 | In Process ▼ | ▼ |
| | | | Total: | 0 | | 0.00 | | | | |

Place Order

**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.

| Export 📊 🖨 | Filter: OFF | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Format ⬍ | Course Type ⬍ | Course ⬍ | Total Quantity ⬍ | Unit Price ($) ⬍ | Total Price ($) ⬍ | Start Date ⬍ | End Date ⬍ | Shipping Status ⬍ | Substitute ⬍ |
| | Print ▼ | CBE | ABE LANG ▼ | 5 | | | 02/22/2023 | 08/22/2023 | In Process ▼ | ▼ |
| | | | Total: | 0 | | 0.00 | | | | |

Place Order

**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.

| Export 📊 🖨 | Filter: OFF | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Format ⬍ | Course Type ⬍ | Course ⬍ | Total Quantity ⬍ | Unit Price ($) ⬍ | Total Price ($) ⬍ | Start Date ⬍ | End Date ⬍ | Shipping Status ⬍ | Substitute ⬍ |
| | Print ▼ | CBE | ABE LANG ▼ | 5 | | | 02/22/2023 | 08/22/2023 | In Process ▼ | ABE LANG ▼ |
| | | | Total: | 0 | | 0.00 | | | | |

Place Order

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

| Export 📊 🖨 | Filter: OFF | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Format ⬍ | Course Type ⬍ | Course ⬍ | Total Quantity ⬍ | Unit Price ($) ⬍ | Total Price ($) ⬍ | Start Date ⬍ | End Date ⬍ | Shipping Status ⬍ | Substitute ⬍ |
| | Print ▼ | CBE | ▼ | | | | 02/22/2023 | 08/22/2023 | In Process ▼ | ▼ |
| ➖ | Print ▼ | CBE | ABE LANG ▼ | 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.

| | Format ⬍ | Course Type ⬍ | Course ⬍ | Total Quantity ⬍ | Unit Price ($) ⬍ | Total Price ($) ⬍ | Start Date ⬍ | End Date ⬍ | Shipping Status ⬍ | Substitute ⬍ |
|---|---|---|---|---|---|---|---|---|---|---|
| | Print ▼ | CBE | ▼ | | | | 02/22/2023 | 08/22/2023 | In Process ▼ | ▼ |
| — | Print ▼ | CBE | ABE LANG ▼ | 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.

| | 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 ▼ | 5 | 100.00 | 500.00 | 02/22/2023 | 08/22/2023 | In Process ▼ | ABE LANG ▼ |
| | | | Total: | 5 | | 500.00 | | | | |

**17.** Click **Place Order**.

## Bulk 02/2023

| Order Created | Invoice Number | Order Status | School/Campus | Funding Source | Form of Payment | Cost Tier |
|---|---|---|---|---|---|---|
| 02/22/2023 | 1 | In Progress: 02/22/2023 | Enthusiasm High School | Enthusiasm High School | PO | Resident |

| | 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 ▼ | 5 | 100.00 | 500.00 | 02/22/2023 | 08/22/2023 | In Process ▼ | ABE LANG ▼ |
| | | | Total: | 5 | | 500.00 | | | | |

**Place Order**

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

**18.** Click **Add a Student**.

Follow the steps listed in [Add a Student](#).

# Start Orders Drafts

> If an order was started and not placed as described in [Bulk Billing & Enrollment](#), it will display on the Start Orders tab where it can be edited, as needed.

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



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

**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.



Changes save automatically.

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



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

Follow the steps described in [Bulk Billing & Enrollment](#) to complete the order.



# 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**.
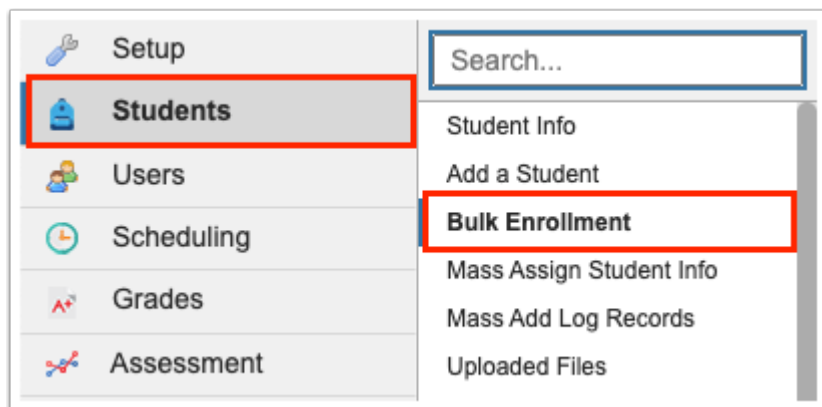
**2.** Click the **Order History** tab.



Use the provided filters to pull the Order History report.

> ℹ️ 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.



**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.



**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.



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

**9.** Click **Search**.



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



**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.

To finish an order, see [Bulk Billing & Enrollment](#) for details.



# 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.

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.



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.

> See [Filters](#) for more information.

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