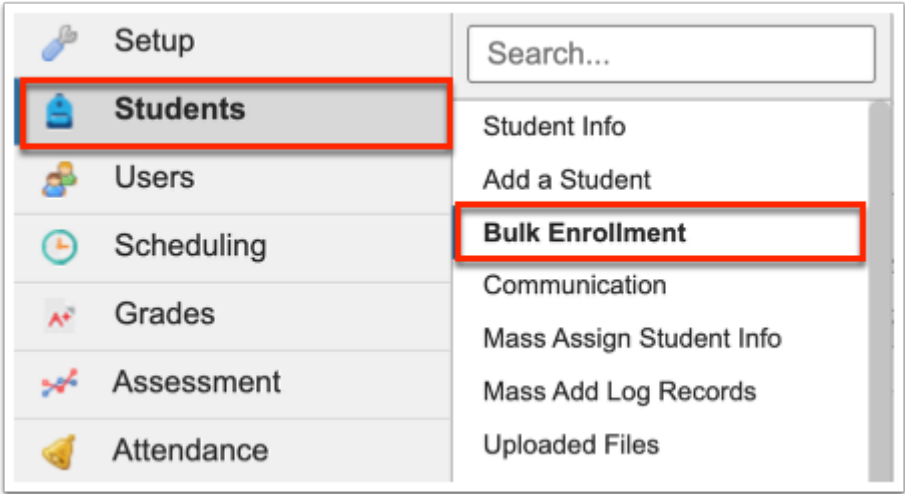


Bulk Enrollment

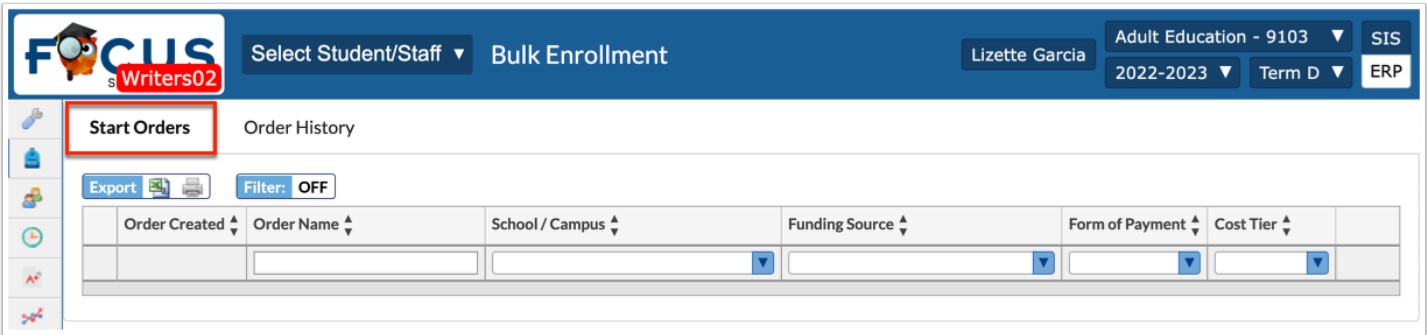
The Bulk Enrollment screen allows post secondary schools to automatically schedule and automatically bill students using the Add a Student process in the Bulk Enrollment setup. Once the process is complete: An Order is started and placed, and students are added, the added students are automatically invoiced; 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.



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

Writer's current

Select Student/Staff ▼ Bulk Enrollment

Lizette Vigil

Focus Technical College ▼ SIS

2022-2023 ▼ Term 2 ▼ ERP

Start Orders Order History

Export Filter: OFF

Order Created	Order Name	School / Campus	Funding Source	Form of Payment	Cost Tier	
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

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

Start Orders Order History

Export Filter: OFF

Order Created	Order Name	School / Campus	Funding Source	Form of Payment	Cost Tier	
	Bulk 05/2023					
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

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

Start Orders Order History



Export Filter: OFF

Order Created	Order Name	School / Campus	Funding Source	Form of Payment	Cost Tier	
	Bulk 05/2023	Enthusiasm High School	Enthusiasm High School			
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

 The School/Campus pull-down displays the schools set up in Setup > [External Schools](#).

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



Start Orders Order History

Export   Filter: OFF

Order Created	Order Name	School / Campus	Funding Source	Form of Payment	Cost Tier	
	Bulk 05/2023	Enthusiasm High School	Enthusiasm High School			
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

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



Start Orders Order History

Export   Filter: OFF

Order Created	Order Name	School / Campus	Funding Source	Form of Payment	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 Items
02/22/2023	ABE Reading	Pink High School	Pink High School	Check	Resident	View Order Items

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

Start Orders Order History



Export   Filter: OFF

Order Created	Order Name	School / Campus	Funding Source	Form of Payment	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 Items
02/22/2023	ABE Reading	Pink High School	Pink High School	Check	Resident	View Order Items



 Cost Tiers are set up via Billing > [Cost Tier Setup](#).

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

Start Orders Order History

Export   Filter: OFF



Order Created	Order Name	School / Campus	Funding Source	Form of Payment	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 Items
02/22/2023	ABE Reading	Pink High School	Pink High School	Check	Resident	View Order Items

Start Orders		Order History					
Export  		Filter: OFF					
Order Created	Order Name	School / Campus	Funding Source	Form of Payment	Cost Tier		
05/02/2023	Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	Check	Resident	View Order Items	
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	

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.

Start Orders		Order History					
Export  		Filter: OFF					
Order Created	Order Name	School / Campus	Funding Source	Form of Payment	Cost Tier		
05/02/2023	Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	Check	Resident	View Order Items	
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	

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.

Writer's current

Select Student/Staff ▾

Bulk Enrollment

Lizette Vigil

Focus Technical College ▾

SIS

2022-2023 ▾

Term 2 ▾

ERP

Start Orders

Order History

Order Items

Bulk 05/2023

Order Created	Invoice Number	Order Status	School/Campus	Funding Source	Form of Payment	Cost Tier
05/02/2023	4	In Progress: 05/02/2023	Enthusiasm High School	Enthusiasm High School	Check	Resident

Export

Filter: OFF

Format ▾	Course Type ▾	Course ▾	Total Quantity ▾	Unit Price (\$) ▾	Total Price (\$) ▾	Start Date ▾	End Date ▾	Shipping Status ▾	Substitute ▾
Print ▾	CBE					05/02/2023	11/02/2023	In Process ▾	
Total:			0		0.00				

Place Order

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

Export

Filter: OFF

Format ▾	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 ▾	
Total:			0		0.00				

Place Order

The Course Type defaults to CBE.

i 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.

Export

Filter: OFF

Format ▾	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 ▾	
Total:			0		0.00				

Place Order

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

i The courses displayed in the pull-down populate from Scheduling > [Courses & Sections](#).

i 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 	<input type="text" value="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.

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				

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

Export


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 ▾	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

Export 		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	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**.

Start Orders
Order History
Order Items

Bulk 05/2023

Order Created	Invoice Number	Order Status	School/Campus	Funding Source	Form of Payment	Cost Tier
05/02/2023	4	Placed: 05/02/2023	Enthusiasm High School	Enthusiasm High School	Check	Resident

Export
Filter: OFF

Course Type	Course	Total Quantity	Quantity Remaining	Unit Price (\$)	Total Price (\$)	Start Date	End Date	Shipping Status	Substitute	
CBE	ABE LANG	5	5	100.00	500.00	2023-05-02	2023-11-02	In Process	ABE LANG	Add a Student
Total:		5	5		500.00					

Order Has Been Placed

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**.

Setup
Students
Users
Scheduling
Grades
Assessment

Search...
Student Info
Add a Student
Bulk Enrollment
Mass Assign Student Info
Mass Add Log Records
Uploaded Files

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

Select Student/Staff ▼
Bulk Enrollment

Lizette Garcia
Adult Education - 9103 ▼
SIS
2022-2023 ▼
Term D ▼
ERP

Start Orders
Order History

Export
Filter: OFF

Order Created	Order Name	School / Campus	Funding Source	Form of Payment	Cost Tier

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.

Start Orders
Order History

Export
Filter: OFF

Order Created	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 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

Changes save automatically.

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

Start Orders
Order History

Export
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.

Start Orders

Order History

Export

Filter: OFF

Order Created	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 Items
02/22/2023	Math	Blonde High School	Blonde High School	Voucher	Non Resi...	View Order Items

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

Start Orders

Order History

Order Items

ABE Reading

Order Created	Invoice Number	Order Status	School/Campus	Funding Source	Form of Payment	Cost Tier
02/22/2023	3	In Progress: 02/22/2023	Pink High School	Pink High School	Check	Resident

Export

Filter: OFF

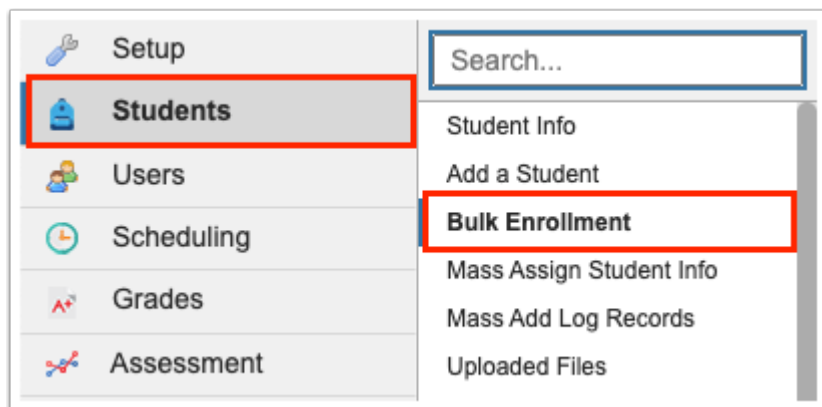
Format	Course Type	Course	Total Quantity	Unit Price (\$)	Total Price (\$)	Start Date	End Date	Shipping Status	Substitute
Print	CBE					02/22/2023	08/22/2023	In Process	
Total:			0		0.00				

Place 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.

The screenshot shows the 'Bulk Enrollment' page. At the top, there is a header bar with 'Writer's current' on the left, 'Select Student/Staff' and 'Bulk Enrollment' in the center, and 'Lizette Vigil', 'Focus Technical College', '2022-2023', 'Term 2', 'SIS', and 'ERP' on the right. Below the header, there is a sidebar with icons for various functions. The main content area has a tab labeled 'Order History' highlighted with a red box. Below the tab, there are several filter fields: 'Order Status' (dropdown), 'Form of Payment' (dropdown), 'School / Campus' (dropdown), 'Funding Source' (dropdown), 'From Date' (05/02/2023), 'To Date' (11/02/2023), and 'Invoice Number' (text input). A 'Search' button is located below these filters. Below the search button, there is an 'Export' button and a 'Filter: OFF' button. At the bottom, there is a table with the following data:

Order Created	Invoice Number	Order Status	Order Name	School / Campus	Funding Source	Form of Payment	
05/02/2023	4	Placed	Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	Check	View Order Items

Use the provided filters to pull the Order History report.

Writer's current

Select Student/Staff ▼

Bulk Enrollment

Lizette Vigil

Focus Technical College ▼

SIS

2022-2023 ▼

Term 2 ▼

ERP

Start Orders

Order History

Order Status

Placed ▼

Form of Payment

▼

School / Campus

▼

Funding Source

▼

From Date

04/04/2023

To Date

11/02/2023

Invoice Number

Search

Export

Filter: OFF

Order Created	Invoice Number	Order Status	Order Name	School / Campus	Funding Source	Form of Payment	
05/02/2023	4	Placed	Bulk 05/2023	Enthusiasm High School	Enthusiasm High School	Check	View Order Items

 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.

Start Orders

Order History

Order Status

Placed ▼

Form of Payment

PO ▼

School / Campus

▼

Funding Source

▼

From Date

02/20/2023

To Date

03/01/2023

Invoice Number

Search

Export

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 Items

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

Form of Payment

School / Campus

Pink High School

Funding Source

Pink High School

From Date

02/20/2023

To Date

03/01/2023

Invoice Number

Search

Export

Filter: OFF

Order Created	Invoice Number	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	<div>View Order Items</div>

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 History

Order Status

In Progress

Form of Payment

School / Campus

Pink High School

Funding Source

Pink High School

From Date

02/20/2023

To Date

03/01/2023

Invoice Number

Search

Export

Filter: OFF

Order Created

02/22/2023

02/22/2023

Invoice Number	Order Status	Order Name	School / Campus	Funding Source	Form of Payment	
2	In Progress	Math	Pink High School	Pink High School	Voucher	<div>View Order Items</div>
3	In Progress	ABE Reading	Pink High School	Pink High School	Check	<div>View Order Items</div>

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

Start Orders
Order History

Order Status
In Progress
Form of Payment

School / Campus
Pink High School
Funding Source
Pink High School

From Date
02/20/2023
To Date
03/01/2023
Invoice Number
3

Search

Export
Filter: OFF

Order Created	Invoice Number	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 Items

9. Click Search.

Start Orders
Order History

Order Status
Form of Payment

School / Campus
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	
02/22/2023	1	Placed	Bulk 02/2023	Enthusiasm High School	Enthusiasm High School	PO	View Order Items
02/22/2023	2	In Progress	Math	Blonde High School	Blonde High School	Voucher	View Order Items
02/22/2023	3	In Progress	ABE Reading	Pink High School	Pink High School	Check	View Order Items

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	
02/22/2023	1	Placed	Bulk 02/2023	Enthusiasm High School	Enthusiasm High School	PO	View Order Items
02/22/2023	2	In Progress	Math	Blonde High School	Blonde High School	Voucher	View Order Items
02/22/2023	3	In Progress	ABE Reading	Pink High School	Pink High School	Check	View Order Items

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

Start Orders
Order History
Order Items

Math

Order Created	Invoice Number	Order Status	School/Campus	Funding Source	Form of Payment	Cost Tier
02/22/2023	2	In Progress: 02/23/2023	Blonde High School	Blonde High School	Voucher	Non Resident

Export  
Filter: OFF

Format	Course Type	Course	Total Quantity	Unit Price (\$)	Total Price (\$)	Start Date	End Date	Shipping Status	Substitute
Print	CBE					02/23/2023	08/23/2023	In Process	
Total:			0		0.00				

Place Order

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 / Campus

Q b

Birthday High School

Blonde High School

Curb Middle/High School

Funding Source

From Date

04/01/2023

To Date

11/02/2023

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.

From Date

02/01/2023



To Date

08/27/2023

Invoice Number

Search

Export



Filter: OFF

Order Created	Invoice Number	Order Status	Order Name	School / Campus	Funding Source
02/22/2023	1	Placed	Bulk 02/2023	Enthusiasm High School	Enthusiasm High School
02/22/2023	2	In Progress	Math	Blonde High School	Blonde High School
02/22/2023	3	In Progress	ABE Reading	Pink High School	Pink High School

Click **Filters** to further breakdown data.

Export

Filter: ON

Order Created	Invoice Number	Order Status	Order Name		Funding Source	Form of Payment	
02/22/2023	2	In Progress	Math		Blonde High School	Voucher	View Order Items
02/22/2023	3	In Progress	ABE Reading		Pink High School	Check	View Order Items

Contains

Not

Equals

Not

Starts with

Not

Ends with

Not

Has value

Not

Greater

Not

Greater or equal

Not

Less


Not

Less or equal

Not

Between

Not

 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.

Export

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 Items
02/22/2023	2	In Progress	Math	Blonde High School	Blonde High School	Voucher	View Order Items
02/22/2023	3	In Progress	ABE Reading	Pink High School	Pink High School	Check	View Order Items