Transcript

Completing a Billing & Adjustment Template Video

Welcome to the Completing a Billing and Adjustment template video.

In this training, we'll guide you through the process of completing the B&A template.

If you are new to Kesef, this template is used to provide Kesef with new charges—also known as bills—and adjustments to existing charges for accounts in your ShulCloud database.

We are going to walk you through each field of the template to help you provide clear and accurate information to Kesef.

When you first fill out the template, please make sure you enter your assigned Client Acronym.

For example, in our case, it's Melissa Shul in Chicago, abbreviated as MSCHI.

Next, add your synagogue's full name, Melissa Shul, followed by the name of the person completing the template and today's date.

Once you've filled in this information, save the template to your computer so you can reuse it in the future and only need to update the date.

We'll circle back to the upload link for Kesef once you've finished filling out the template and are ready to upload it for processing.

In row six, you'll find a section for special instructions.

Here, you can include notes such as "include child name in the notes for all school tuition transactions."

The main part of the template is where you'll provide Kesef with the necessary details to process your request.

Pl here is crucial, as it ensures a smooth and efficient process with your Kesef AR representative, streamlines the workflow, and helps expedite the overall process.

In column A, Enter the desired action, "A" if it is an adjustment, "B" if it is a new bill or charge.

For column B, we require the full account name as it appears in ShulCloud.

Column C is where you will enter the amount to bill or the amount of the adjustment.

If the adjustment reduces an existing charge, make sure to enter the amount as a negative number.

Enter the date the charge should appear on the statement for a new bill in column D.

If the entry is for an adjustment enter the date of the existing billing to ensure the correct transaction is adjusted.

For the charge type, in column E, use the exact name as it appears in ShulCloud.

If you're unsure, you can find this information by navigating to Admin > My Lists > Charge Types to see the list of available charge types.

Adding clear and accurate details here minimizes back-and-forth questions from your Kesef AR representative and streamlines the process.

In Column F, you can also include optional information, such as additional notes to show on statements or dedication details, to provide further clarity.

Enter any payment instructions in column G.

Specify the card to be charged (if one is saved on the account) and or provide details such as the number of monthly recurring payments and the start date.

When creating adjustments, you'll have additional fields to clarify the type of adjustment in columns H though M.

If left blank, "adjustment" will be used by default.

Using different adjustment types can ensure more precise reporting in the future.

If the adjustment is for a Discount or Scholarship, please place an X in the corresponding column.

Repeat these instructions for each billing or adjustment item.

If you are billing the same account for multiple items, each billing should be listed in its own separate row.

Once you've completed the template, save your work to your computer.

Complete the Kesef 2.0 Form to submit the template.

You can access the form in two ways: either click the URL in row 5 to go directly to it or navigate to https://shulware.zendesk.com/hc, where you will choose the Kesef Help Center button. This will take you to the full Kesef Help Center. From here you will choose the "Kesef 2.0 Communications Form" and select the "Click here to submit a Request" button.

If you're unfamiliar with the form, we have a helpful video available to guide you through the process.

You can find this video easily by scrolling to the bottom of the article and selecting it.

Kesef will process the request as soon as possible, in most cases completing it within 48 business hours from the time of the form submission.

Monthly recurring payment plans and refunds may take longer.

If you have any changes to a billing and adjustment Template already submitted, please **DO NOT** submit the same Template with added or corrected items.

Please submit any additions or corrections on a new or separate billing and adjustment template.

If additional information is needed to process your request, your Kesef ShulCloud Representative will contact you.

Thank you for watching the Completing a Billing & Adjustment Template video.

If you have any questions, please don't hesitate to contact your Kesef ShulCloud AR representative.