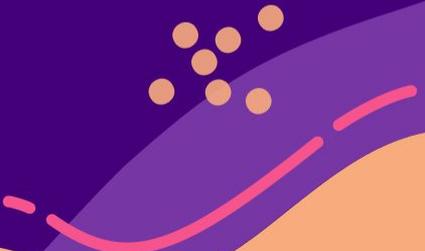




CONNECT

# MSB Invoicing | Make it make cents: Invoicing for your Schools made simple

PRESENTED BY Matthew Smith & Julie Eckert



# Overview

- Invoice or Product, how do I decide?
- What I can I do get ahead on using Invoices?
- How can I let parents know about outstanding invoice balances?
- How can I record an in-person payment or a non-payment?

The background features a central white space surrounded by abstract, organic shapes in shades of orange, purple, and blue. These shapes are decorated with various elements: dashed orange lines, solid orange lines, clusters of small pink dots, and clusters of small orange dots. The overall aesthetic is modern and minimalist.

**This or That**

# Why use MSB Invoicing?

- What MSB services are you currently using today?
- What are the key differences between using Store Products and Invoicing?
- What fees do you need to collect payments for?
- How are you collecting those fees? MSB Store, MSB Invoicing, checks & cash, another system, etc.

The background features abstract, organic shapes in shades of orange, purple, and blue. There are several decorative elements: a cluster of five purple dots in the upper left, a cluster of three purple dots in the upper right, a cluster of five orange dots in the lower right, and a cluster of four orange dots in the lower left. Dashed lines in orange and purple follow the contours of the shapes.

# How to Get a Head Start on Invoicing

# Using an Invoice Template

- Standardize options for use throughout the school year
- Allow for other admins to utilize
- Prerequisite for School and Course Fees
- Set up options ahead of time

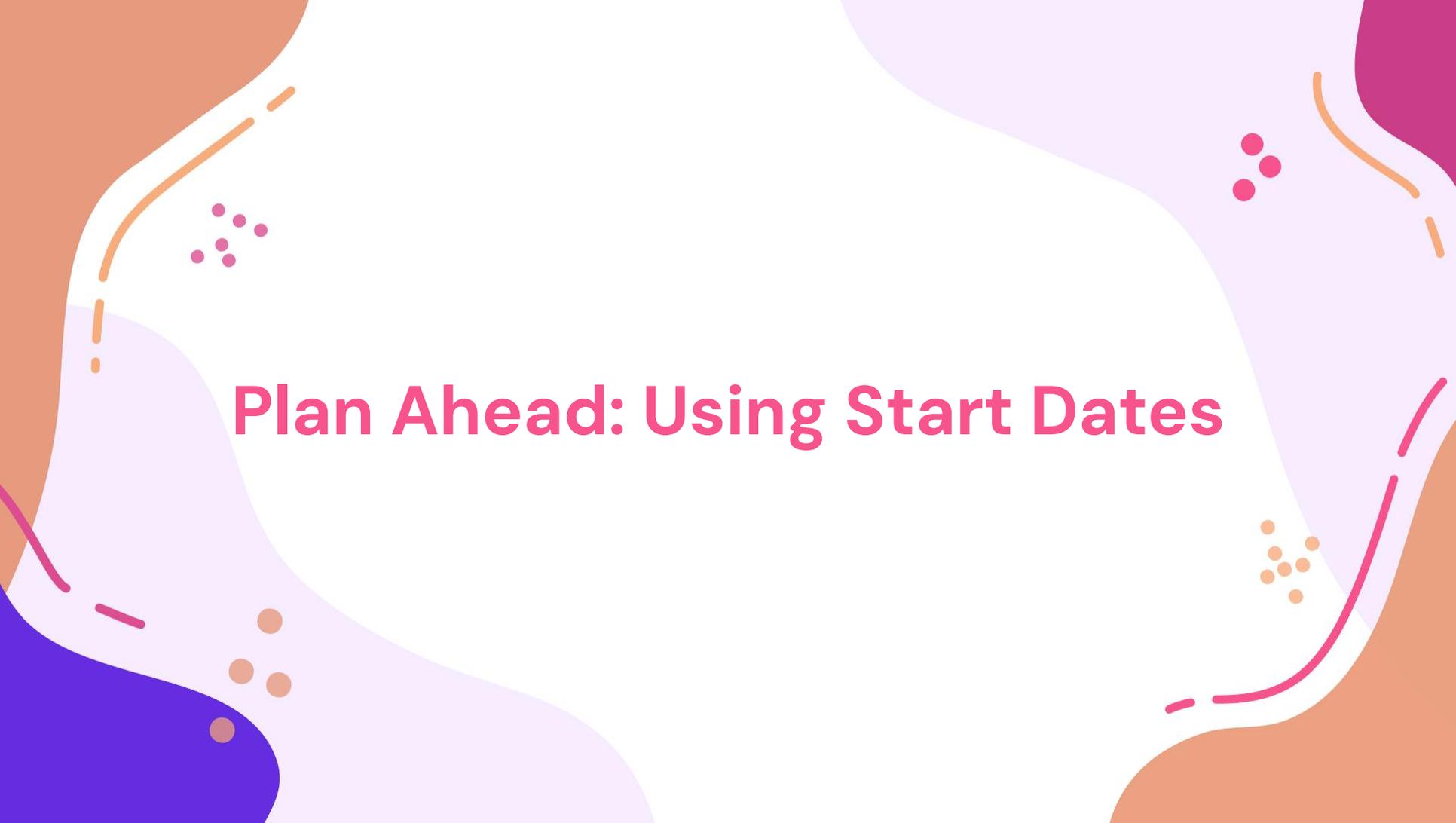
# How to use Invoice Templates

1. Navigate to **Invoices** > **Invoice Templates**
2. Click **Add**
3. Select Default Store if prompted
4. **Template Name** – Internal Only
5. **Invoice Date** – Optional
6. **Due Date** – Optional
7. **Add a fee** – Choose an existing fee or create one ad hoc

# How to use Invoice Templates

## 8. More options

- a. **Provider** – Unless instructed otherwise, select Invoices
- b. **Store** – Which Store should these invoices be recorded
- c. **Department** – Optional for further reporting
- d. **Notify Contact**
  - i. **No Additional Contacts** – MSB Users only
  - ii. **Primary Contacts Only** – Synced emails for students
  - iii. **All Contacts** – All associated contacts (may include unintended notifications)
- e. **Allow Partial Payments** – Allow or Do not allow
- f. **End Date** – Optional (Removes parental visibility but keeps invoice active)
- g. **Description** – Optional (Internal Only)
- h. **DataHub Mapping** – Used for certain integrations (Only use if instructed)

The background features a central white space surrounded by abstract, organic shapes in shades of orange, purple, and blue. Scattered throughout are decorative elements: small clusters of dots in purple, orange, and pink, and various curved lines in solid and dashed styles in orange and pink. The overall aesthetic is modern and artistic.

# Plan Ahead: Using Start Dates

# Plan Ahead: Using Start Dates

1. Don't Wait:
  - It is not necessary to wait until the day of to assign fees.
2. Plan Ahead:
  - Create invoices when you know about them to save yourself the stress of making them last minute.
3. Schedule an Invoice Date:
  - Invoices will not be sent to parents until the set Invoice Date/Start Date.

# How to use Start Dates

1. Invoices > Invoice Templates (New)
2. Edit an existing template or create a new one
3. Set an "Invoice Date"

## Add Invoice Template

[See What's New](#) Cancel Create

Template ID\*

Template Name\*

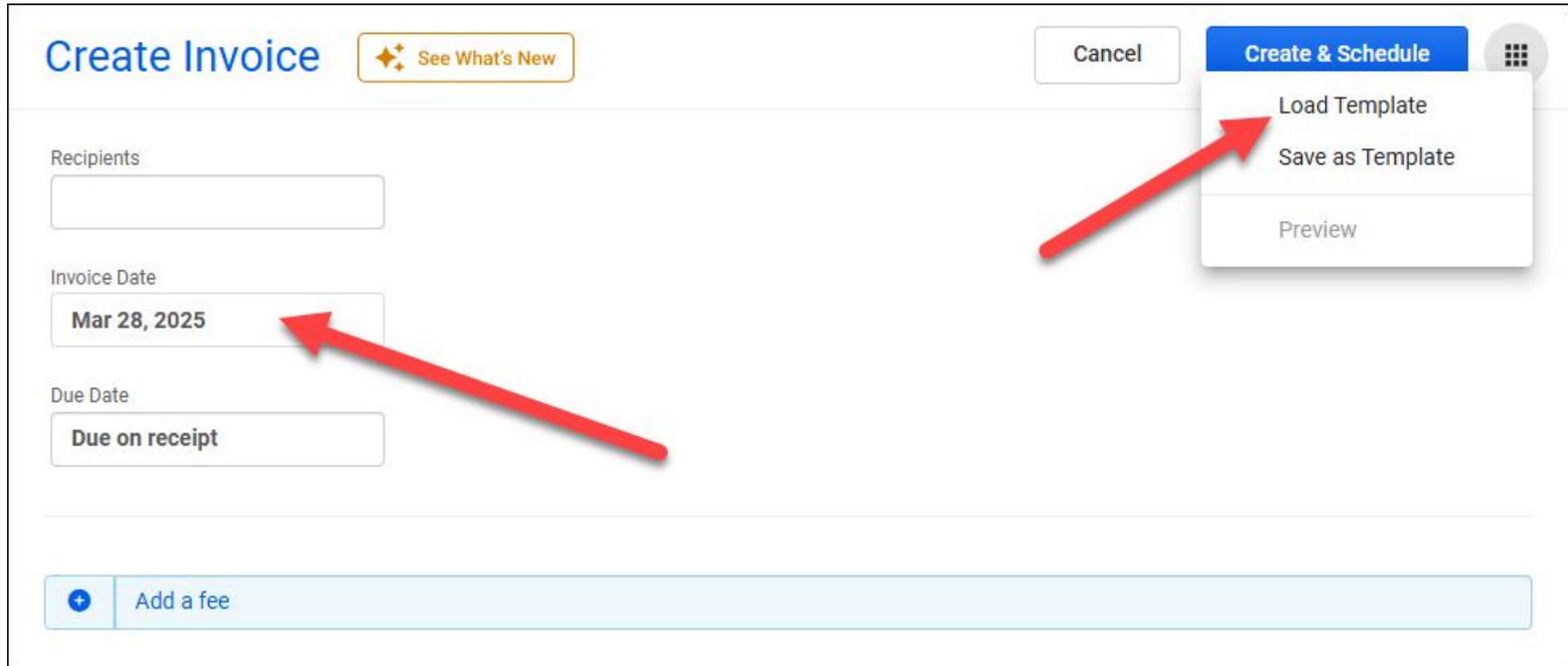
Status  Enabled  Disabled

Invoice Date

Due Date

# How to use Start Dates

1. Invoices > Invoices > Add Invoice(s) (New)
2. Set an Invoice Date:
  - Load an existing invoice template with a start date OR
  - Or if you do not have a template, set an "Invoice Date" here:



The screenshot shows the 'Create Invoice' interface. At the top left, there is a blue header 'Create Invoice' and a yellow button 'See What's New'. To the right are 'Cancel' and 'Create & Schedule' buttons. A dropdown menu is open from the 'Create & Schedule' button, showing options: 'Load Template', 'Save as Template', and 'Preview'. A red arrow points from the 'Load Template' option to the 'Invoice Date' field, which contains 'Mar 28, 2025'. Another red arrow points from the 'Invoice Date' field to the 'Due Date' field, which contains 'Due on receipt'. At the bottom left, there is a blue button with a plus sign and the text 'Add a fee'. The word 'ECT' is partially visible in the bottom right corner.

**Create Invoice** [See What's New](#) Cancel Create & Schedule

Recipients

Invoice Date

Due Date

[+ Add a fee](#)

ECT

+ Add Invoice(s) ▾

Search



50 ▾



Invoice ID



Creation Date



Invoice Date



Status

Invoice Amount

Total Payments

Remaining  
Amount



[inv8125](#)

Mar 05, 2025

Mar 28, 2025

Pending

30.00

0.00

30.00



[inv8124](#)

Mar 05, 2025

Mar 28, 2025

Pending

30.00

0.00

30.00



[inv8123](#)

Mar 05, 2025

Mar 28, 2025

Pending

30.00

0.00

30.00



[inv8122](#)

Mar 05, 2025

Mar 28, 2025

Pending

30.00

0.00

30.00



[inv8121](#)

Mar 05, 2025

Mar 28, 2025

Pending

30.00

0.00

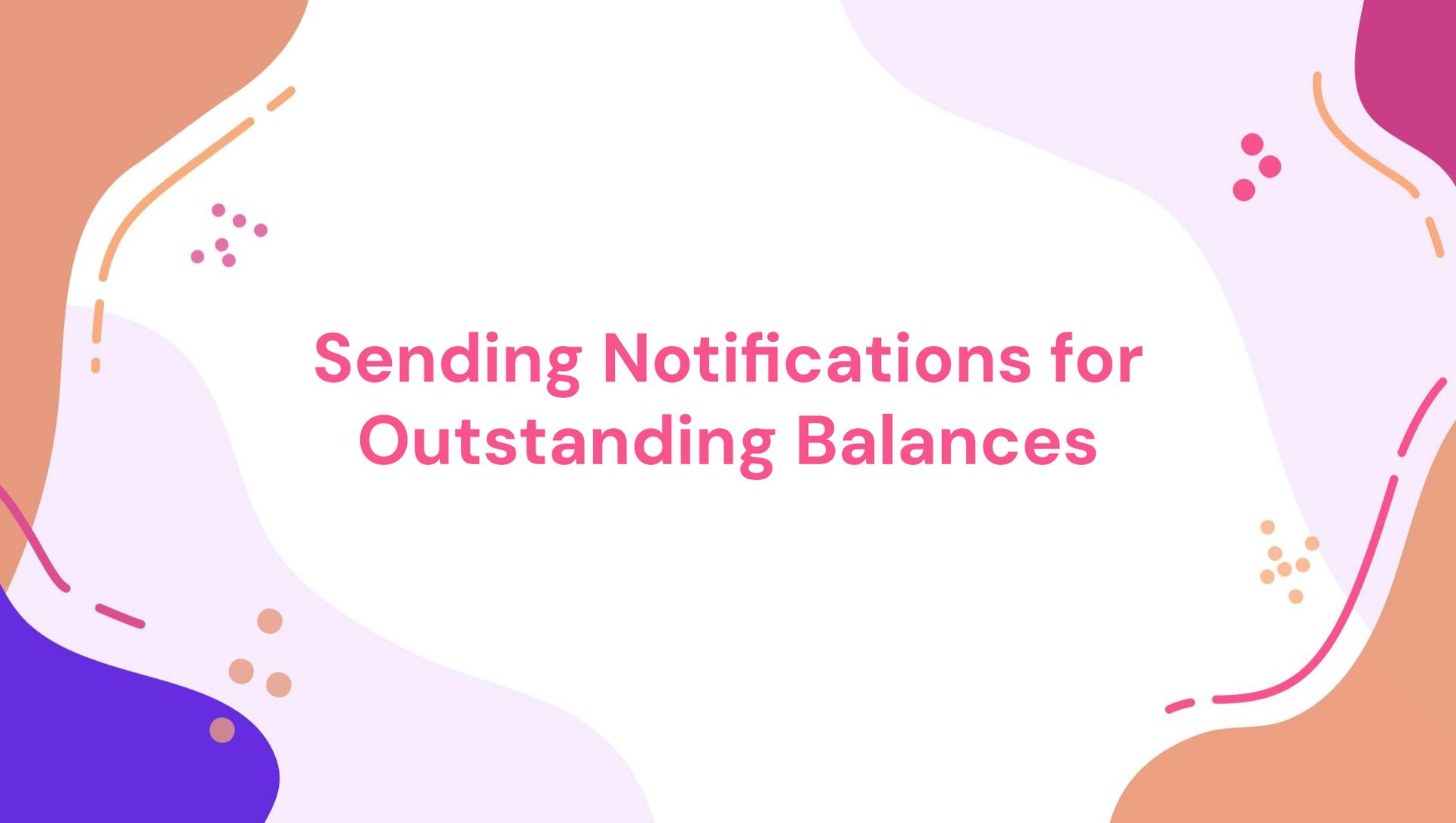
30.00

Showing 1 to 5 of 5 items

Selected Actions ▾

Export

+ Add Invoice(s) ▾

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# **Sending Notifications for Outstanding Balances**

# Sending Notifications for Outstanding Balances

- Creation Emails
- Due Dates & Schedules
  - Reminder Options
  - How to create Schedules
- SOA
  - How to run
  - Options page
- Balance Notifications
  - How to set up
- Customized Reminders (Beta)
  - Process with each screenshot of each page

# New Invoice Notification

MySchoolBucks School Invoice Notice inbox x

 do-not-reply@myschoolbucks.com  
to me ▾

7:10 PM (3 hours ago)

School Invoice Notice

Hi Casey,

You have new or updated invoices in MySchoolBucks from **Matt's Sandbox Academy**. Check out the details below or log in to make a payment.

[Pay now](#)

---

Claire F Conway

Invoice #: 381121-208-2

DATE	INVOICE DETAILS	AMOUNT
3/18/25	Student Holiday 5. Daily Select   Student Holiday Test, 03/20/2025	\$50.00

*Note: If you have already paid these fees and/or they are not applicable, please disregard*

[Log in to MySchoolBucks](#)

Heartland School Solutions  
765 Jefferson Road #400  
Rochester NY 14623

Support

MySchoolBucks is not the only option to make payments to your school. To learn more about alternative free options for adding funds to student accounts, please contact your school or school district.

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# Reminder Notification

 do-not-reply@myschoolbucks.com  
to me ▾

Thu, Mar 13, 12:10 AM (5 days ago)

School Invoice Reminder Notice

*You received this email on behalf of Matt's Sandbox Academy*

Dear Parent or Guardian,

This is a friendly reminder that payment for invoice #: 353118-127-2 in the amount of \$175.00 is due on 03/13/2025.

Click the "Pay Now" button below to make a payment.

Thank you!

[PAY NOW](#)

[Log in to MySchoolBucks](#)

Heartland School Solutions  
765 Jefferson Road #400  
Rochester NY 14623

Support | Privacy Notice

MySchoolBucks is not the only option to make payments to your school. To learn more about alternative free options for adding funds to student accounts, please contact your school or school district.

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[↩ Reply](#) [➡ Forward](#) 

# Student Statement of Accounts

- Reports > Students/Users > Student SOA
  - Filters for School, Grade, Homeroom, Specific Students
  - Select Students > Continue
    - Custom District Message
    - Option to Add “Mail Payments To Address”
    - Invoice Options
      - Include Payments made to Pending Invoices
      - Include Paid Invoices for a Date Range
    - Other Options
      - Show Grade, Homeroom, School, Meal Balance
      - Filter by a Store
      - Include Order History for a Date Range
        - This will include Student Required product purchases for the student during the selected date range

# Balance Notifications

- Configuration > Balance Notifications
  - Toggle Enabled On
  - Edit
    - Frequency
      - Every week, Every 2 weeks, Every 3 weeks, Monthly
    - Start Date (Notifications will go out on this day of the week based on frequency)
    - Notification Stop Date
    - Look Back Month for the current School Year
  - Analytics > Toggle Tracking On
    - Emails Sent
    - Emails Clicked
    - Payments from clicks

# Outstanding Balance Notification

The screenshot shows an email notification from MySchoolBucks. At the top, it says "do-not-reply@myschoolbucks.com" and "3:16 AM (7 hours ago)". The MySchoolBucks logo is prominently displayed. Below the logo, it says "Statement of Account" and "You received this email on behalf of MSB Connect District". The main heading is "Dear Parent or Guardian," followed by a friendly reminder about student fees. A "Pay now" button is visible. Below this is a table with columns for DATE, INVOICE DETAILS, and AMOUNT. The table lists two invoices: one for \$20.00 on 3/11/2025 for a "Lost Book" and another for \$5.00 on 3/11/2025 for a "Late Fee - 03/11/2025". A note at the bottom states: "Note: If you have already paid these fees and/or they are not applicable, please disregard." At the bottom of the email, there is a "Log in to MySchoolBucks" button, social media icons, and app store links for the App Store and Google Play. The footer includes contact information for Heartland School Solutions and a copyright notice for 2025 Heartland Payment Systems, LLC.

DATE	INVOICE DETAILS	AMOUNT
3/11/2025	Lost Book	\$20.00
3/11/2025	Late Fee - 03/11/2025 Late Fee for installment 1 on 03/11/2025	\$5.00

# Statement of Accounts

The screenshot shows a "Statement of Account" page for MSB Connect District. The page header includes the MySchoolBucks logo and the text "Statement of Account". Below the logo, it says "MSB Connect District" and "2025myschoolbucks". A table titled "Statement of Account" provides student information: Date (3/20/2025), Student Name (Barry Anderson), Student ID (13), School (Apple Grove High School), Grade (12), Mail Balance (\$0.00), and Unpaid Invoices (\$764.00). A "Paid Due" amount of \$25.00 is also indicated. Below this is a detailed table of invoices with columns for Date, Invoice ID, Fee Name / Description, Invoice Amount, Remaining Amount, and Due Date. The table lists various fees including AP History, Journalism, Chrombook Repair, Lost Book, Late Fee, Journalism Field Trip, Class of 2025 EOY Field Trip, Parking Pass, Seniors Farewell Gala, and Chamber Singer Field Trip. The total outstanding balance is \$764.00. A note at the bottom states: "Your outstanding balance is \$764.00. Payments are easily accepted by going to MySchoolBucks. Cash or check payments are also accepted at any school office or by mailing your payment with this statement to:" followed by the MSB Connect District address: 123 A Street, Newtown, NY 14623. At the bottom, there is a "Log in to MySchoolBucks" button, social media icons, and app store links. The footer includes contact information for Heartland School Solutions and a copyright notice for 2025 Heartland Payment Systems, LLC.

Date	Invoice ID	Fee Name / Description	Invoice Amount	Remaining Amount	Due Date
3/3/2025	inv162	AP History - AP History	\$94.00	\$94.00	
3/11/2025	inv750	Journalism	\$25.00	\$5.00	
3/11/2025	inv406	Chrombook Repair	\$35.00	\$35.00	03/31/2025
3/11/2025	inv586	Lost Book	\$20.00	\$20.00	03/11/2025
3/11/2025	inv586	Late Fee - 03/11/2025 Late Fee for installment 1 on 03/11/2025	\$5.00	\$5.00	03/11/2025
3/13/2025	inv125	Journalism Field Trip	\$100.00	\$100.00	
3/13/2025	inv126	Class of 2025 EOY Field Trip	\$200.00	\$200.00	
3/13/2025	inv127	Parking Pass	\$200.00	\$180.00	
3/13/2025	inv129	Seniors Farewell Gala	\$100.00	\$60.00	
3/13/2025	inv131	Chamber Singer Field Trip	\$200.00	\$75.00	
Account Balance				\$764.00	

# Custom Invoice Reminders (Beta)

- Invoices > Invoices
  - Filter as necessary
  - Select All or Select Individual Invoices
  - Selected Actions > Send Reminder(s)
    - 1 - Select Invoices Review
    - 2 - Options
      - Recipients
        - Send email to household contact on file
          - All MSB users that have added this student to their account
        - Send email to student contact on file
          - Emails on the General tab
        - Send to additional emails on invoice
          - Additional emails added to invoice manually or on a flat file upload
      - Custom Message
    - 3 - Recipients Review
    - Send > Send

# Custom Reminder



A Friendly Reminder: School Fees Are Due

**Invoice Reminder**, sent on behalf of MSB Connect District

Hi **Matty**,

This is a friendly reminder of the invoices listed below.

Testing the **Custom Send Option**

[Pay now](#)

Barry Anderson

Invoice #: **inv1329**

DATE	INVOICE DETAILS	AMOUNT
3/13/25	Seniors Farewell Gala	\$100.00
	<b>Total:</b>	<b>\$100.00</b>
	<b>Payments:</b>	<b>\$50.00</b>
	<b>Remaining:</b>	<b>\$50.00</b>

Invoice #: **inv1331**

DATE	INVOICE DETAILS	AMOUNT
3/13/25	Chamber Singer Field Trip	\$200.00
	<b>Total:</b>	<b>\$200.00</b>
	<b>Payments:</b>	<b>\$125.00</b>
	<b>Remaining:</b>	<b>\$75.00</b>

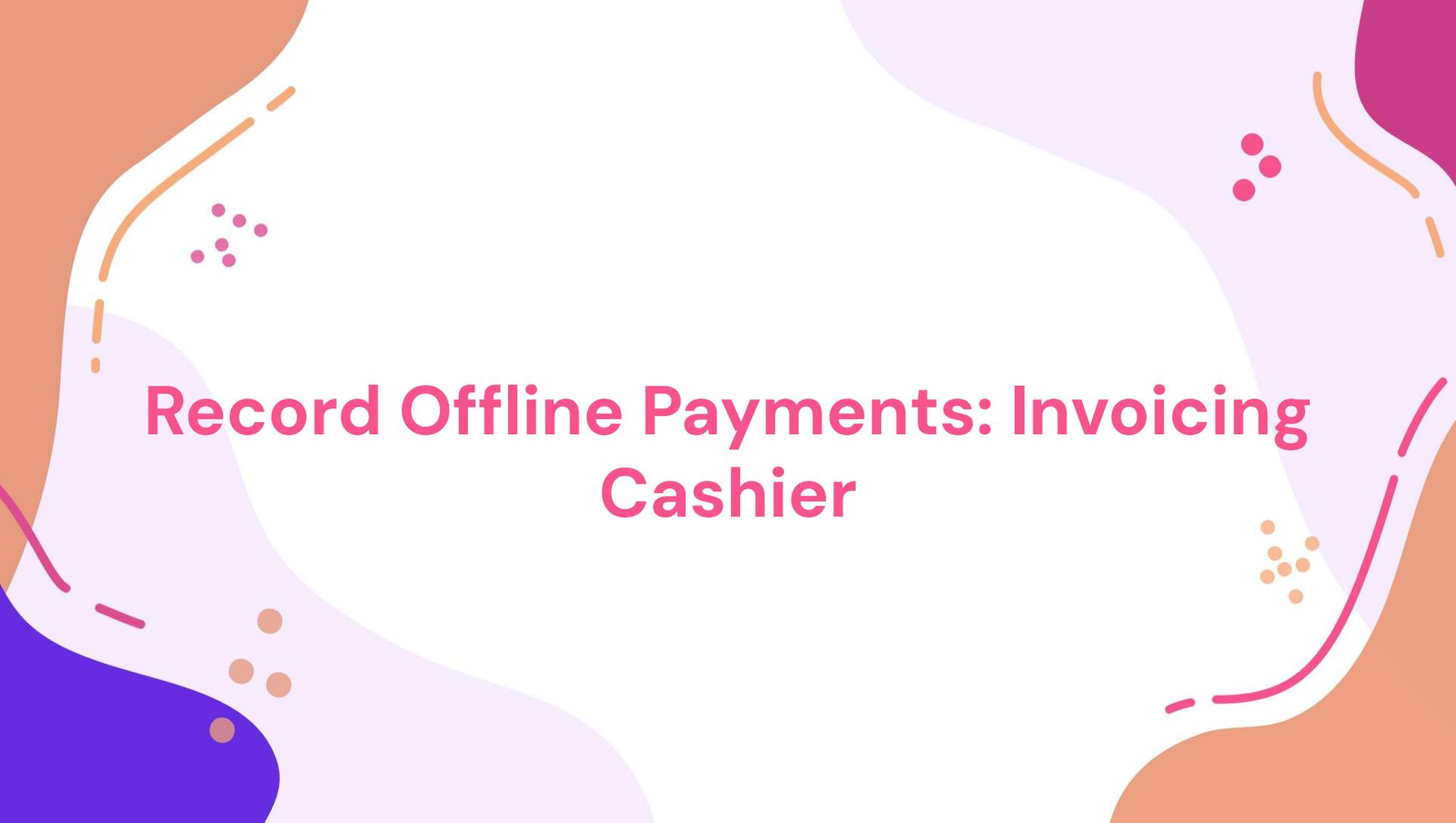
Invoice #: **inv1448**

DATE	INVOICE DETAILS	AMOUNT
3/20/25	Chamber Singers	\$25.00

*Note: If you have already paid these fees and/or they are not applicable, please disregard.*

[Log in to MySchoolBucks](#)

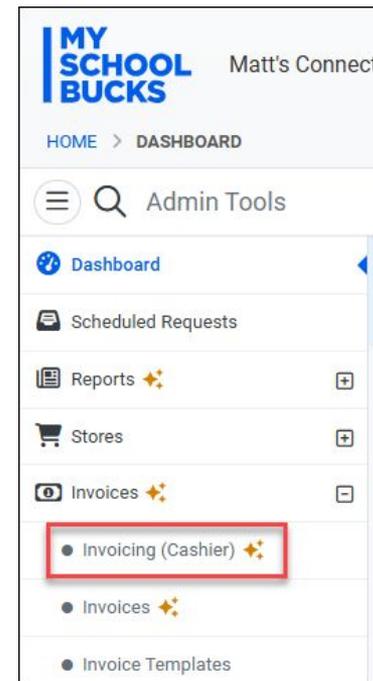


The background features abstract, organic shapes in shades of orange, purple, and blue. There are several clusters of small dots in various colors (purple, orange, pink) and dashed lines in orange and pink, scattered across the white space.

# Record Offline Payments: Invoicing Cashier

# Uses for Invoicing Cashier

- Record an in-person cash/check/money order payment
- Waive a portion of a fee with a non-payment
  - Scholarships
  - Exemptions
  - Fundraisers
- Leave a note when you record anything on the Invoicing Cashier
  - Check numbers
  - Dates
  - Reasons for waiving
- Review notes left by admins for in-person payments and non-payments



Fee	Type	Amount
Connect 2025 Tuition Demo	Standard	\$1,550.00  

 Add a fee

**Total Amount**

**\$1,550.00**

Provider 

PowerSchool/DataHub 

Store

Invoices Store 

Department

Select Department 

Notify Contact

No Additional Contacts 

Allow Partial Payments

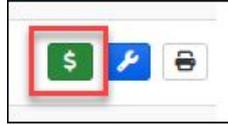
Allow 

End Date

End Date (Optional) 

# Invoicing Cashier

- Invoices > Invoicing Cashier
- Locate the invoice you need to record a payment/non-payment for
- Click the green dollar sign symbol
- Enter the amount to pay or waive
  - To record a portion, the invoice must allow partial payments.
- Select a payment option:
  - Payments: cash, check, credit memo, money order, voucher
  - Non-Payments: admin change, fee not correct, fee refused, not participating, waived, etc.
- Enter a note for your records
- Record the payment/non-payment
  - Click "Record Payment," then on the next page click "Confirm"



<input checked="" type="checkbox"/>	Student Name (#)	Fee Name	Amount	Remaining	Payment Amount	Payment Option
<input checked="" type="checkbox"/>	Adams, Julie (4638)	Connect 2025 Tuition Demo	\$1550.00	\$1550.00	750.00	Waived Scholarship

Distribute Across Schedule?  Yes  No

# Parent View:

Invoice #: inv8147 Payment Options Add To Cart

Date Added	Fee Name	Description	Student Name	Amount
03/06/2025	Connect 2025 Tuition Demo		Aikinson, Andy	\$1,550.00

Hide Payments ^

Date	Description	Amount
03/06/2025 11:31:13 AM	Waived <span>Scholarship</span>	\$750.00

**"Distribute Across Schedule"**  
will split the non-payment  
evenly across all due dates

Invoice Amount	\$1,550.00
Total Payments	\$750.00
Remaining Amount	\$800.00
Next Amount Due	\$66.66 <span>Mar 28, 2025</span>

This invoice has a payment plan with multiple due dates Hide Payment Plan

### Payment Plan

The following payment plan is available for this invoice. Please Click Payment Options to make a payment or to set up automatic payments.

1. <span>Mar 28, 2025</span>	2. Apr 11, 2025	3. Apr 25, 2025
4. May 09, 2025	5. May 23, 2025	6. Jun 06, 2025
7. Jun 20, 2025	8. Jul 04, 2025	9. Jul 18, 2025
10. Aug 01, 2025	11. Aug 15, 2025	12. Aug 29, 2025

Chat

# Review Invoicing Cashier Notes

1. Reports > Invoices > Invoice Report (Detail)
2. View invoices with payments, refunds and non-payments
3. Use other filters as needed
4. Click "Search"
5. Notes will be under the "Payment Type / Notes" column (only payments)
6. The detailed report can be exported to excel (includes non-payments)

Student	Fee Name	Invoice Amount	Remaining Amount	Payment Amount	Payment Type / Notes	
Rachel Gadd	Algebra	100.00	0.00	100.00	Check #1234	
				<b>Total Payments:</b>	<b>\$ 100.00</b>	

Showing 1 to 1 of 1 Items

**Thank you**

CONNECT