

## The Step-by-Step Guide to Fully Automated Billing for Your Studio

Welcome to your free guide on a step-by-step process to fully automating your billing and tuition collection for your studio! In this guide, we'll be laying out two different ways to set up fully automated billing for your studio.

The first section is a very detailed, step-by-step guide to setting up your Studio account in Stripe and using it to charge your families for no cost other than the processing fees that Stripe charges.

The second section in this guide gives a very quick glimpse into the easier way: truly automated billing with our SmartBilling engine in StudioBridge.

### The 100% Free Way to Automate Your Billing: [Stripe](https://Stripe.com)



If you're looking for a free way to automate your billing and have the time to spend setting things up, your first step to automatically charging your families in your studio is to set up a free account on Stripe.com. Stripe is an online payment processing company that now powers payment processing for some of the largest and most prestigious organizations in the world, including all of the companies below, and also companies like Slack, Instacart, Pinterest, Saks Fifth Avenue, and more.



## Who can use Stripe?

The quick answer: anyone! Even individuals and sole proprietors can use Stripe to charge customers.

## How does Stripe work - is it really free?

Your customers pay you through Stripe, and Stripe handles the entire process securely. In exchange for dealing with the bank and getting the payment processed and the money transferred from their bank to yours, Stripe charges a small processing fee of 2.9% + \$0.30 per transaction. For example, if you bill a family \$100 for services, a total of \$96.80 will transfer into your bank account within a few business days. If you are accepting payments online, you'll pay this processing fee, no matter which provider you use. There are absolutely no monthly or ongoing subscription fees to take payments through Stripe! Once you receive a charge, Stripe will take out the processing fees and transfer the money into your connected bank account usually within a few business days! It's like magic!

**Quick tip** - if your organization is registered as a 501c3 non-profit, you may be eligible for a substantial discount on the processing fees, saving you thousands of dollars!

[Check out this link for more info.](#)

## How do I actually physically take payments through Stripe?

There are two main ways that you can accept payments for your classes and lessons through Stripe:

1. **Manually through the Stripe dashboard:** in this process, you set up the customers and subscriptions manually in Stripe and then they automatically recur and Stripe handles it all for you!
2. **Through a software system of some kind:** in this process you use a third-party software tool to hook up to Stripe and accept payments. Here are several examples of what that looks like:

- a. **E-commerce:** Stripe can be hooked up to systems like [Shopify](#), [WooCommerce](#) and [Magento](#) in order to accept payments online for e-commerce goods you may sell at your studio.
- b. **Accounting software:** hook Stripe up to things like [Harvest](#) or [FreshBooks](#) to send out invoices for your classes or lessons
- c. **Website Forms:** install add-ons like [Stripe for Gravity Forms](#) (WordPress) so you can hook up your Stripe account to forms on your website and accept online payments from your families.

### How to get started:

- Step 1: Set up your Stripe account
- Step 2: Create your customer(s)
- Step 3: Create your subscription plan(s)
- Step 4: How to charge your families in Stripe for one time payments
- Step 5: Verify your account and switch to live mode - you're done!

Now, let's walk through each step of this process with screenshots so you can follow along to get going with online payment processing in Stripe.

**\*\*NOTE\*\*** Stripe has a concept of "Live" vs. "Test" modes in your account. When you first create your account, everything that we do up until Step 5 will all be in test mode, so you can act like you are making a charge, but no live charges will actually be made! If you would like to create a test customer with a test credit card account, you may use the test customer card number shown in Step 2.

## Step 1: Set up your Stripe account

Visit <https://dashboard.stripe.com/register> to create your Stripe account. On that page, you can either create an account with a username and password, or you can actually click the "skip this step" link and go right into an account, and save your details later!

The image shows the Stripe account creation page. At the top is the Stripe logo. Below it is the heading "Create your Stripe account." followed by a link "...or save your account later, and skip this step". The form contains four input fields: "Email", "Password", "Confirm password", and a checkbox for "I'm not a robot" (reCAPTCHA). A blue button at the bottom says "Create your Stripe account". At the very bottom, it says "Already have an account? [Sign in.](#)".

Red arrows point to the "Email", "Password", "Confirm password", and "I'm not a robot" fields. A red arrow points from the word "OR" to the "skip this step" link.

**If you create your account details now** - you'll be sent a verification email that contains a link it that you have to click. It looks like this:

Confirm your Stripe email address!

 Inbox x



Stripe <support@stripe.com>  
to me ▾

Welcome to Stripe!

Before you can start accepting live payments, you need to confirm your email address. To get started, just confirm your email address by clicking the link below:

[https://dashboard.stripe.com/confirm\\_email?t=Vls4AaYl2KLbAAZCDu3ZPvy0DpHG9cVI](https://dashboard.stripe.com/confirm_email?t=Vls4AaYl2KLbAAZCDu3ZPvy0DpHG9cVI)

Once you're ready to start integrating Stripe, we recommend taking a look at our docs:

<https://stripe.com/docs>

If you are not a programmer or just want to check out existing integrations that require little to no development, you may find the resources we've put together helpful:

<https://support.stripe.com/questions/using-stripe-without-programming>

In either case, you can view your payments, API request logs, and a variety of other information about your account right from your dashboard:

<https://dashboard.stripe.com>

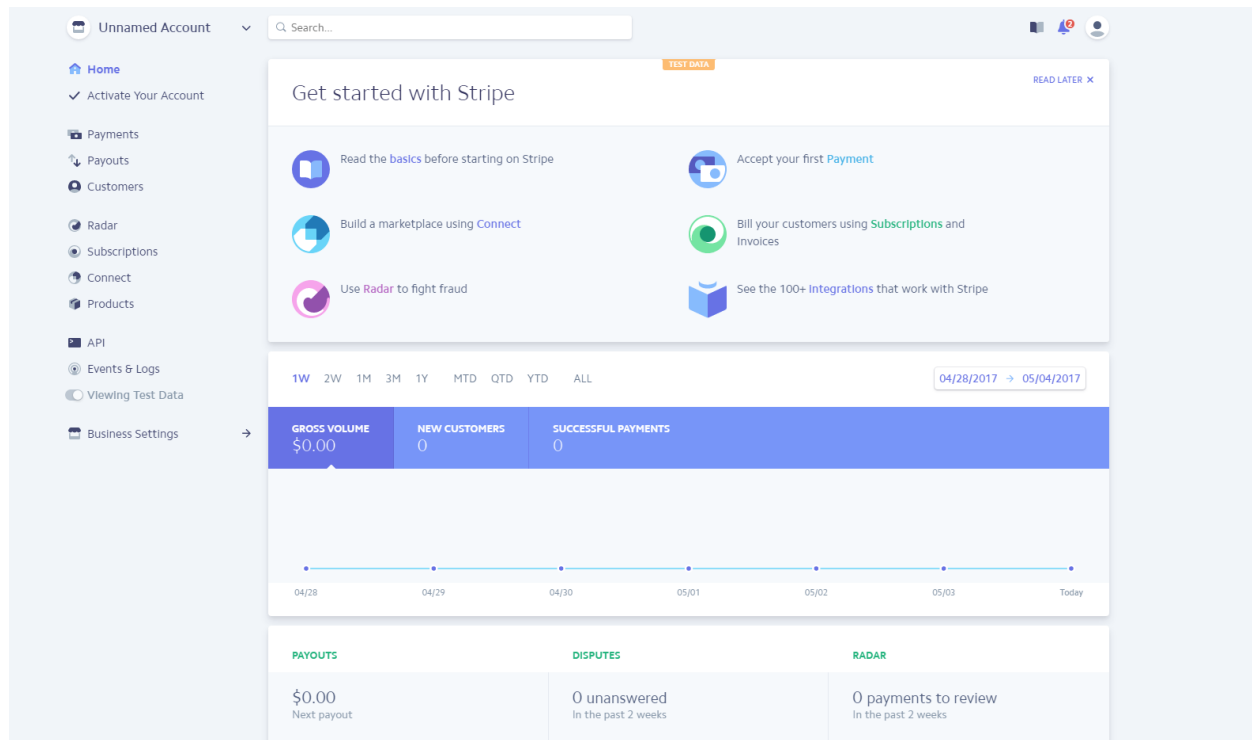
We'll be here to help you with any step along the way. You can find answers to most questions and get in touch with us at <https://support.stripe.com/>.

Hope you enjoy getting up and running. We're excited to see what comes next!

Yours,

The Stripe Team

**If you skip this step link** - you'll be taken right inside your account - you should see a dashboard that looks like this. Beautiful, isn't it?



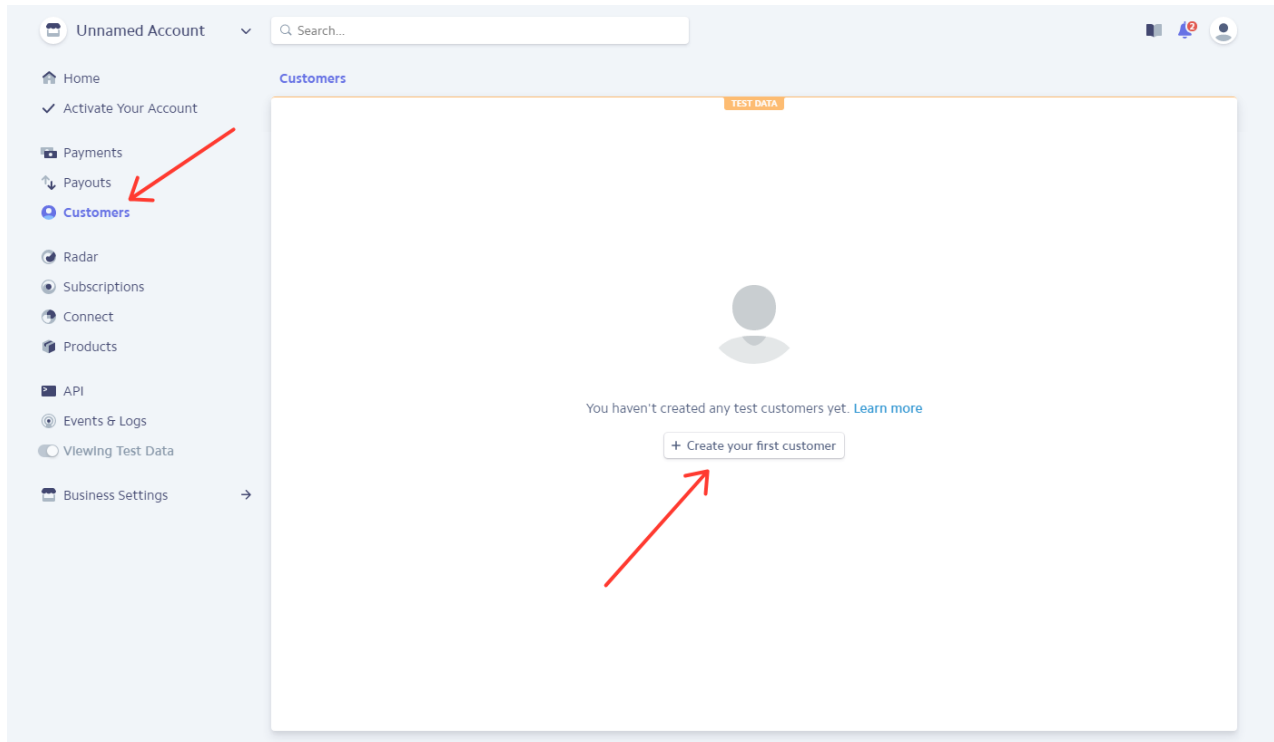
What's just as beautiful is how easy it is to set up a plan and start billing your families. When your Stripe account is first created, it is in Test Mode. This means that no live payments can run through the system, because you have not yet been verified as a business or sole proprietorship. Later on in the document, we'll take a look at how to activate your account and switch to live mode!

## Step 2: Create your customer(s)

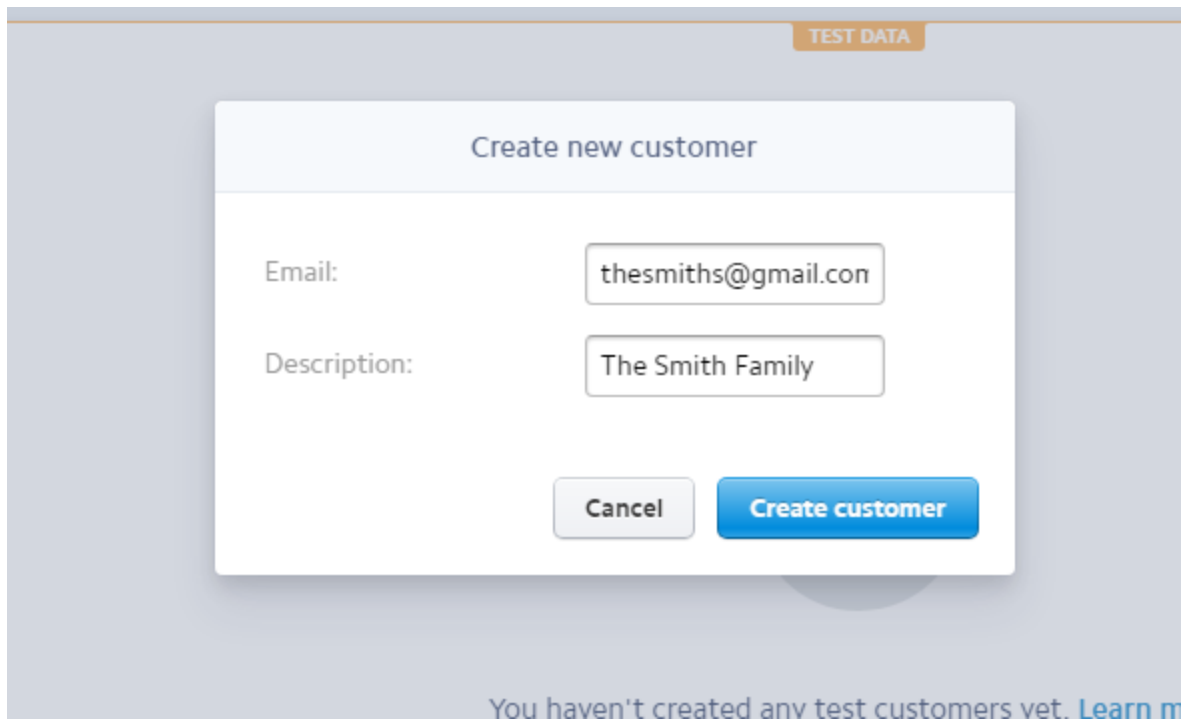
There will be two ways that you can bill your families in Stripe: ongoing subscriptions, and one-time payments plans. We'll walk through how to set each up separately. Either way you choose to bill, you'll need to create your customers in Stripe first.

## Creating a customer

Inside your Stripe dashboard, click the “Customers” link in the left menu, then click the “Create your first customer” button in the center of the page.



When you click that button, a box will pop up where you can enter the customer's email address and a description (The Smith Family, for instance). Click “Create Customer”!



TEST DATA

### Create new customer

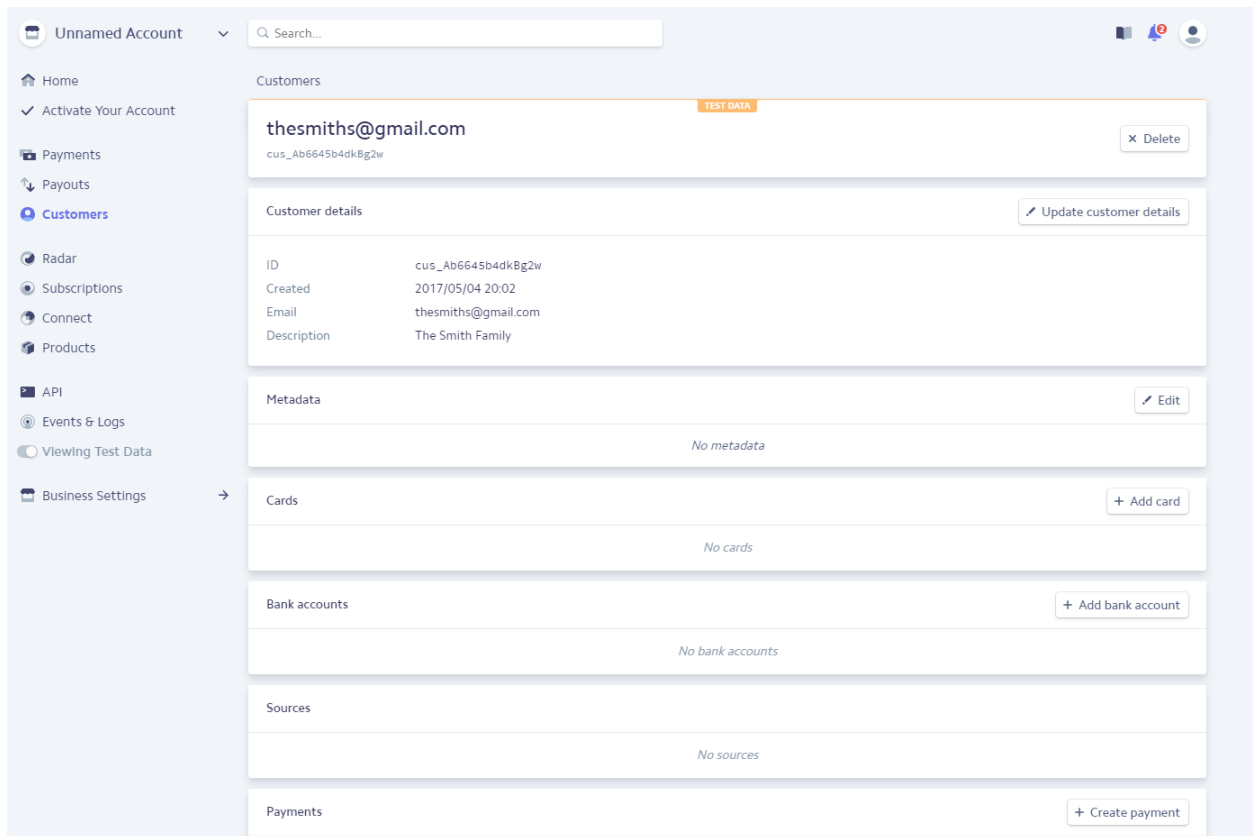
Email:

Description:

You haven't created any test customers yet. [Learn m](#)

Once the Smiths are created, you'll see them listed in your Customers list. You now have a customer that can be billed for classes and/or lessons! If you click on the customer's email address in the Customers list, you'll see a bunch of information about your customer, including basic info, credit card number storage, payments, subscriptions and more! This is where all of your customer info is now stored for this particular studio family.





The screenshot shows the StudioBridge dashboard for an 'Unnamed Account'. The left sidebar contains navigation links: Home, Activate Your Account, Payments, Payouts, Customers (selected), Radar, Subscriptions, Connect, Products, API, Events & Logs, Viewing Test Data, and Business Settings. The main content area is titled 'Customers' and features a search bar. A customer profile for 'thesmiths@gmail.com' (ID: cus\_Ab6645b4dk8g2w) is displayed. The profile includes a 'Delete' button, a 'Customer details' section with an 'Update customer details' button, and a 'Metadata' section with an 'Edit' button. Below these are sections for 'Cards' (No cards), 'Bank accounts' (No bank accounts), 'Sources' (No sources), and 'Payments' (Create payment).

## Adding the credit card info

If the family is present with you, this is a great time to enter their card info in the “Cards” section! Entering their card info stores it 100% safely and securely with Stripe, so you don’t have to worry about security! Once their card info is stored, they can then be billed in Stripe for whatever charges you’d like to charge them for! If you are using a test customer to try things out right now, you may use the following info to add a test credit card that will actually work for test purchases:

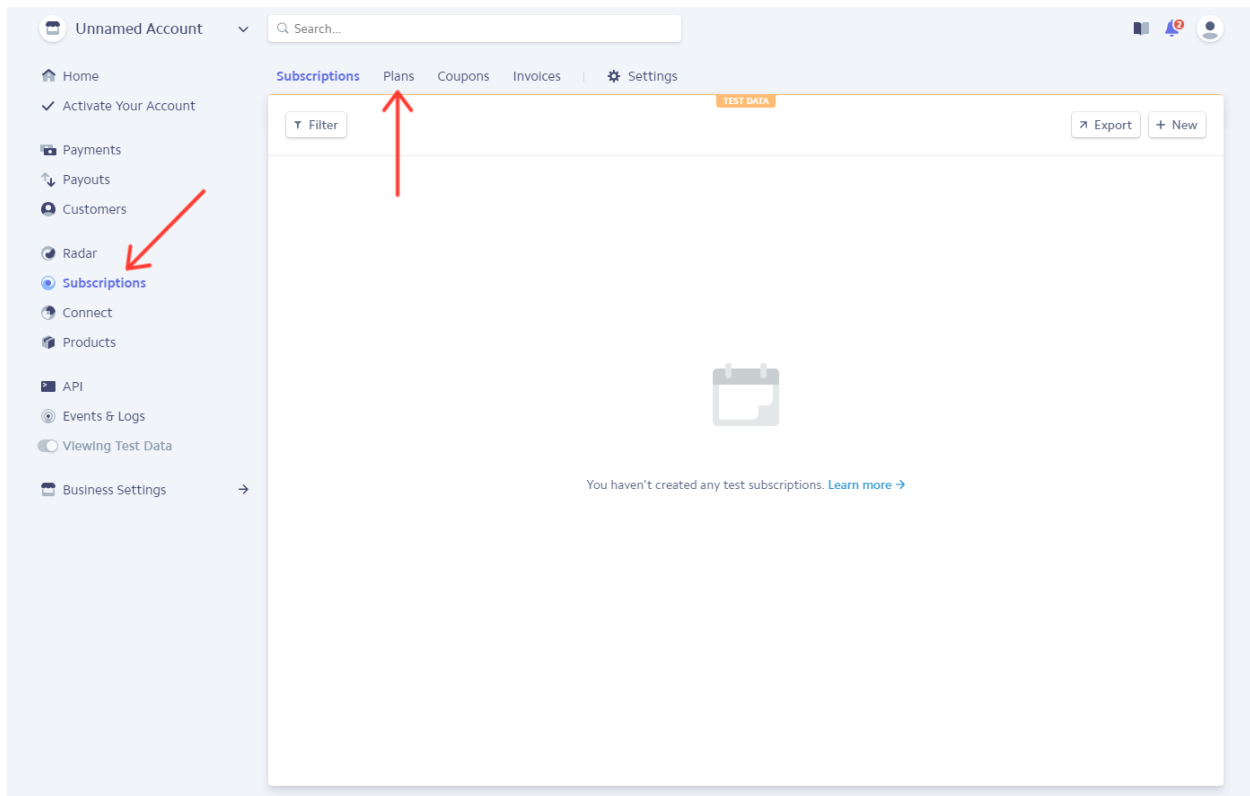
**VISA Card #:** 4242424242424242 **Exp. Date:** 1/2025, **CVC:** 123

Repeat this entire step for any additional real families you would like to create as customers for your studio. Bottom line - if you want to charge a family or individual for anything - they'll need to be a customer in your Stripe account!

### **Step 3: Create your subscription plan(s)**

The next step to being able to charge your customers for your lessons and classes through Stripe is to create your payment plans. Payment plans are ongoing charge amounts (all the way from daily, to monthly, to a fully custom time interval) that you would like to charge your families for things that happen on a recurring basis, such as weekly piano or dance lessons, monthly classes, and so-on.

For example, if you have a Piano Lesson that you charge a family \$200/month for (for 4 lessons maybe), then in Stripe you would be creating a new Plan called "Monthly Piano Lessons" and you would set the price to \$200 per month. Here's how that looks:



First - click on the “Subscriptions” left menu link. Then, click on the “Plans” menu link at the top of the page. Finally, click the “Create your first plan” button and you should get a screen that looks like the below. Fill in the details of your plan following the help bubbles along the way if needed. In this example, we have set up a \$200/month subscription for Piano Lessons at our studio. You may also set a trial period on the plan if you want to give the family a free lesson maybe, or a trial of some sort. If you set a trial period, Stripe will not start the monthly billing until the trial period is up. In this example, the Smiths would not be billed their first \$200 installment until 14 days from the day we set this up.

Create new plan

ID:

1

?

Name:

Monthly Piano Lesson

?

Currency:

USD - United St...

Amount:

\$ 200.00

?

Interval:

monthly

Trial period\_days:

14

?

Statement desc:

My Piano Studio

i

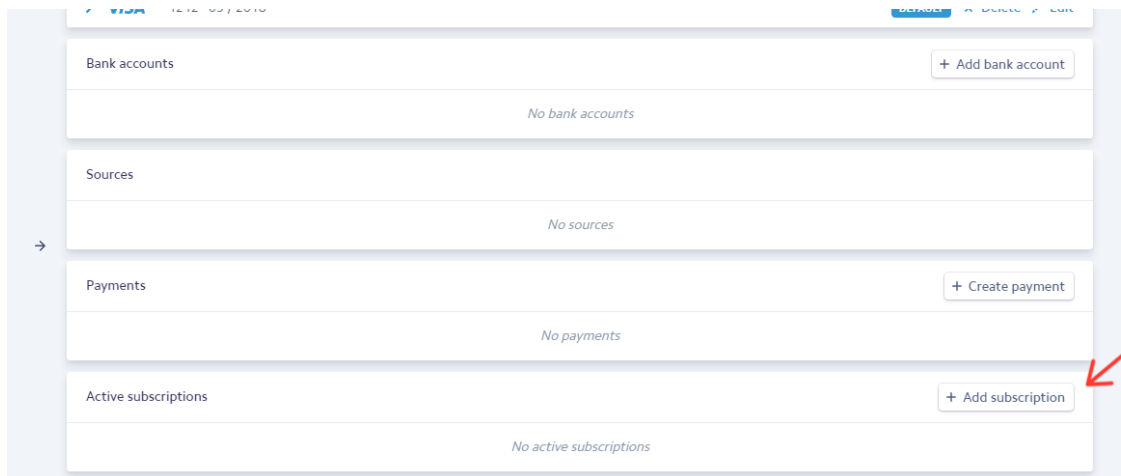
Cancel

Create plan

Click “Create plan” and you’re all done! Now you have a plan that you can subscribe any customer to in your Stripe account! Repeat this process for any other types of recurring subscription plans you would like to be able to charge your customers for.

The next step is subscribing a customer to this new plan! So in our example, let’s enroll the Smith’s in our Monthly Piano Lesson plan for \$200/month with a 14 day free trial.

First, click on “Customers” in the left main menu. Then, click on the Smith’s customer email address in the list to be taken to their personal Customer page. Once on their customer page, scroll down to the “Active Subscriptions” section and click the button:




Once you click on the button, you’ll see a new page. Click the “add a plan” button.

Subscriptions
Plans
Coupons
Invoices
Settings


Back

TEST DATA
Create a subscription

Customer


The Smith Family  
thesmiths@gmail.com - cus\_Ab6645b4dkBg2w

Plans




No plans added  
You must add one or more plans to create a subscription

+ Add a plan

Cancel
Create subscription

Once you click the “Add a plan” button, you’ll see a popup window that shows you all of your available plans. Click “Add” next to the plan you want to add them to!

Customer


The Smith Family  
thesmiths@gmail.com - cus\_Ab6645b4dkBg2w


Plans

Close

Add a plan

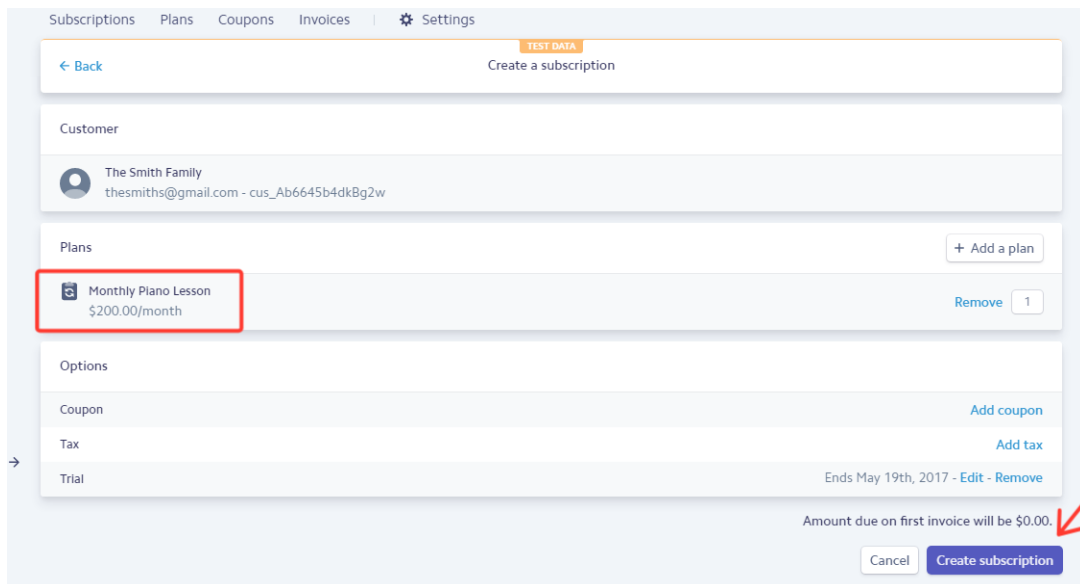
+ Create a plan

Search...


Monthly Piano Lesson  
\$200.00/month, default 14 day trial period

Add

After you click “Add,” you’ll be taken to one last screen that shows you the plan they are getting put on. If all looks good, click the “Create subscription” button to immediately charge them (if there is no free trial on your plan), or to start the free trial (if there is one - like the 14 day free trial on our plan).



Subscriptions Plans Coupons Invoices Settings

TEST DATA

← Back Create a subscription

Customer

The Smith Family  
thesmiths@gmail.com - cus\_Ab6645b4dkBg2w

Plans

+ Add a plan

Monthly Piano Lesson  
\$200.00/month

Remove 1

Options

Coupon Add coupon

Tax Add tax

Trial Ends May 19th, 2017 - Edit - Remove

Amount due on first invoice will be \$0.00.

Cancel Create subscription

That’s it! Your family is now on your recurring subscription. It’s that easy! Stripe will not automatically bill the Smiths every month for \$200! The next screen you are taken to is a confirmation screen that shows you these 4 things:

1. That the family is Trialing (free trial) or Active (no free trial)
2. The Family’s billing cycle
3. The end of the free trial (if there is one)
4. The plan details for confirmation

Subscriptions
Plans
Coupons
Invoices
|
⚙️ Settings

TEST DATA

thesmiths@gmail.com on Monthly Piano Lesson

TRIALING 1

Subscription details
Edit Details

ID:	sub_Ab6p8U90maX0xZ	Current period:	2017/05/04 to 2017/05/18 2
Customer:	thesmiths@gmail.com	Created:	2017/05/04
Plan:	Monthly Piano Lesson (\$200.00/month) 4	Trialing until:	2017/05/18 3
Quantity:	1	Tax percent:	No tax applied.

Repeat this process for any other families or customers you would like to be on this, or any other type of recurring payment plan! The customer's email address will be emailed with a receipt automatically every time there is a payment.

## Step 4: How to charge your families in Stripe for one-time fees

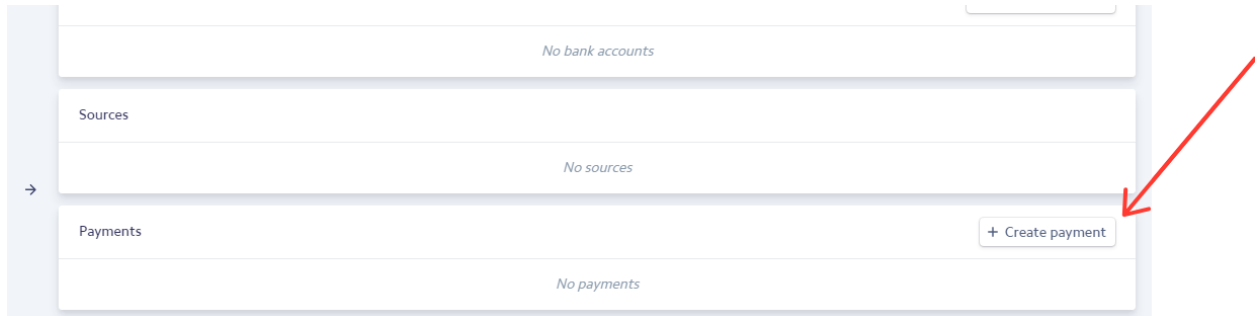
In Step 3, we looked at how to setup a recurring payment plan for your families. In the end, this is the holy grail, because if you are able to get all of your families on flat, recurring plans, you can truly sit back and let Stripe do the work for you!

Sometimes, however, you may want to be able to bill one of your families for a one-time charge for a class, lesson, book, costume, t-shirt, etc. Here's how:

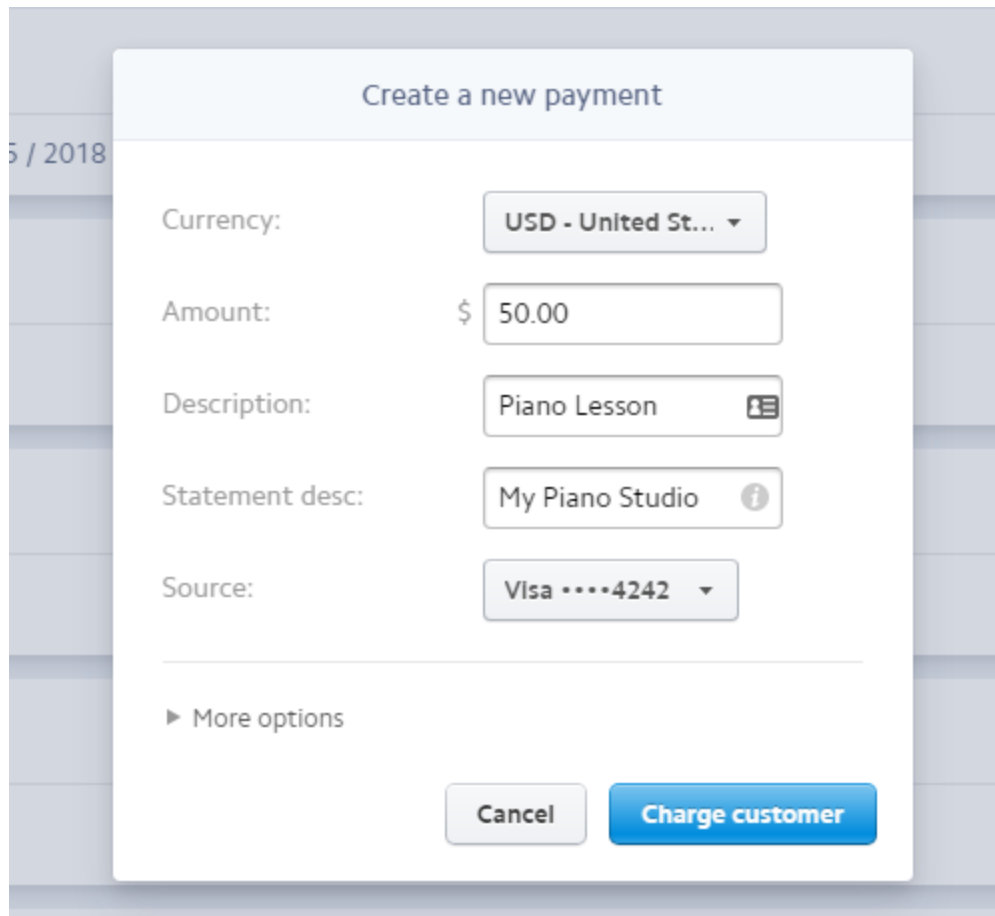
First, click on the "Customers" link in the main left menu, find the customer you want to charge a one-time fee, and then click on their email address. You should be taken to



their customer page. Once on their customer page, scroll down to where it says “Payments” and click the “Create a payment” button:



Once you click the “Create a payment” button, a popup window will appear:



The screenshot shows a modal window titled "Create a new payment". It contains the following fields and options:

- Currency:** A dropdown menu showing "USD - United St..." with a downward arrow.
- Amount:** A text input field with a dollar sign icon and the value "50.00".
- Description:** A text input field with the value "Piano Lesson" and a small icon of a document with a list.
- Statement desc:** A text input field with the value "My Piano Studio" and an information icon (i).
- Source:** A dropdown menu showing "Visa \*\*\*\*4242" with a downward arrow.
- More options:** A link with a right-pointing triangle icon and the text "More options".
- Buttons:** At the bottom, there are two buttons: a light gray "Cancel" button and a blue "Charge customer" button.

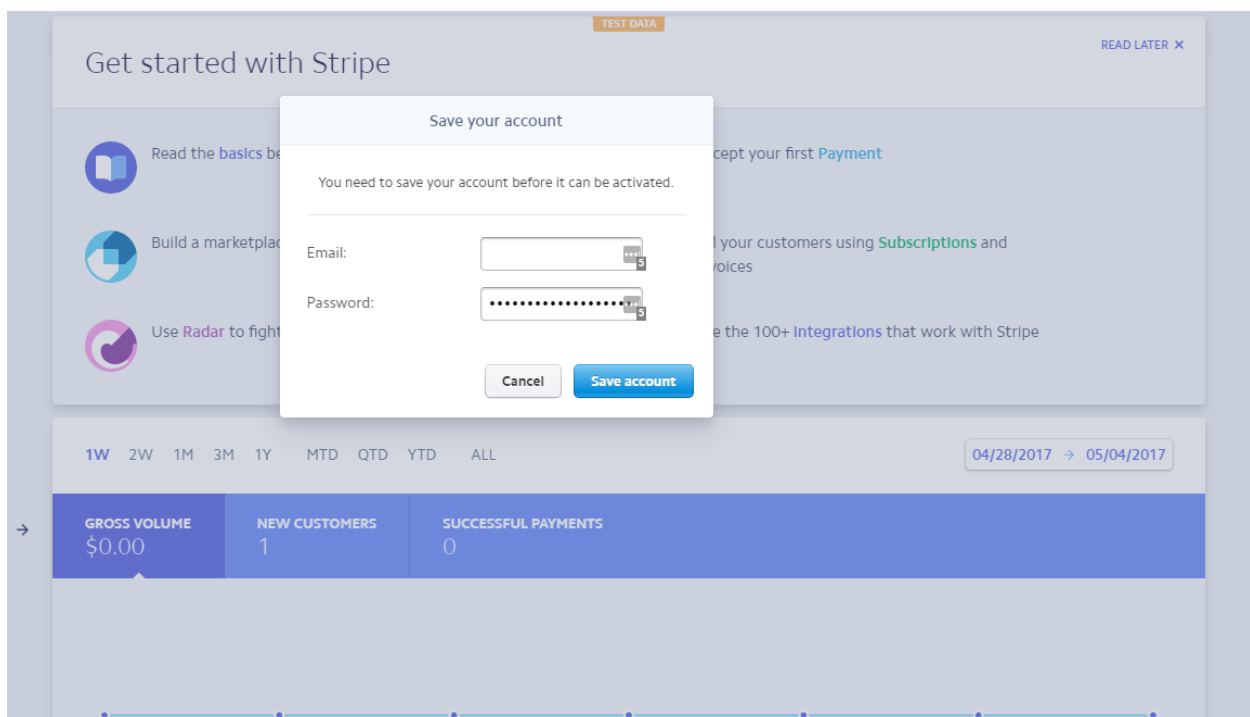
Enter your one-time payment details and click “Charge customer.” It’s that simple! Once you charge the customer, you will see the payment info stored on their Customer page. The customer’s email address will be emailed with a receipt automatically!

## Step 5: Verify your account and switch to live mode

In order to actually bill any of your families with a live charge for either a recurring subscription or a one-time charge, you will need to verify with Stripe that you are a legitimate person or business. This is a free and easy process, but does have to be





completed in order for you to make a live charge and actually charge your customers. Here's how to verify and activate your account:

In the left menu at the top, click “Activate your account.” Back in step 1, if you went ahead and created an email and password for your account, you'll go directly to the verification screen where you can fill out all of the info that Stripe asks for in order to verify your account. If you skipped the account creation back in Step 1, you'll be asked to enter an email address and a password for your account info to continue and verify your account. Once you enter that, you'll be sent a verification email. Click the verification link in the email to be taken back into your account after verifying.



Now, one more time, click the “Activate your account” option in the left menu, and you'll be taken to the Account Application screen:

Q Search...



## Account application

Where are you based?

Country

United States

⌵

[Don't see your country?](#)

Your product

Tell us about your business

What do you sell; when do you charge the customer?

✎

→ Account details


Your business type

Individual / Sole Proprietorship

⌵

• EIN (Tax ID)

123456789



Business address

Street


ZIP

City

⌵

Your website

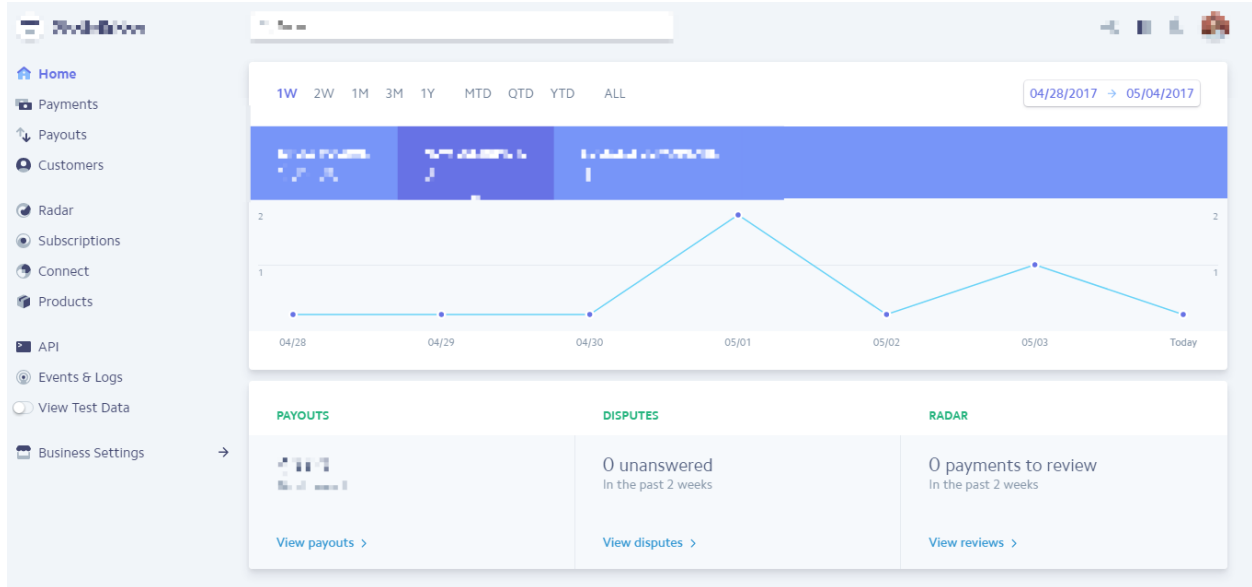
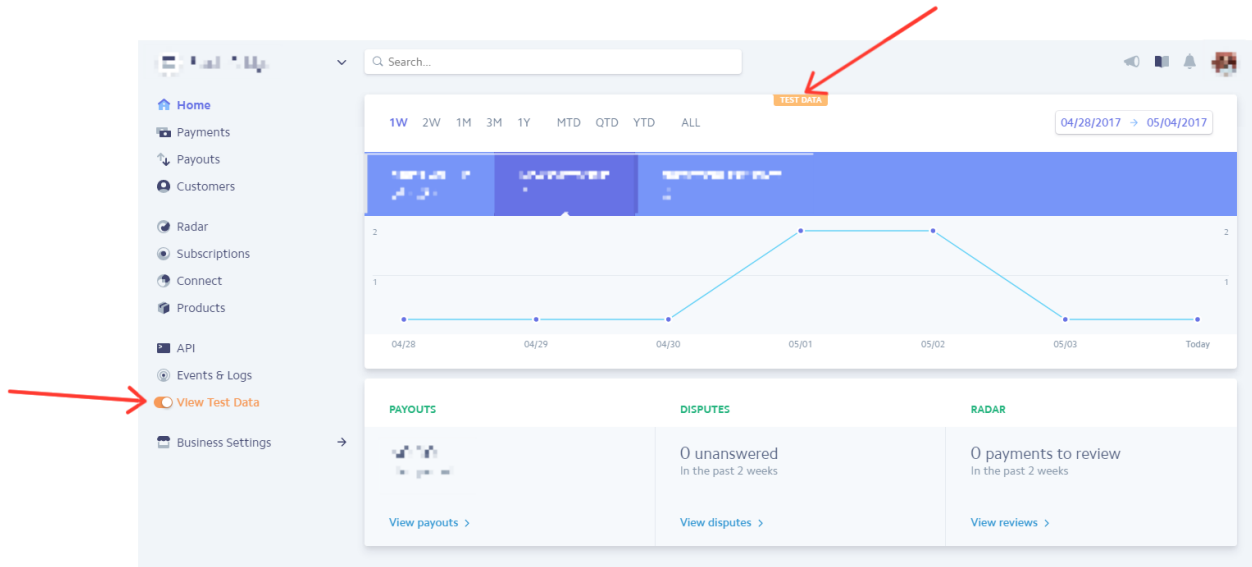
https://mycompany.com



• Denotes the field is optional

Follow the on screen fields to fill out all the requested info from Stripe. Here you'll enter everything from your basic studio or business info, to your bank account info (so your money can get transferred to you once your customers pay you!). Once you complete this process, your account will be activated.

Once activated, your account should go immediately into Live Mode. If you still see the yellow “TEST DATA” tab at the top of your dashboard, and the “Viewing Test Data” toggle switch is still on, simply click the “Viewing Test Data” toggle switch and it will switch your account into live mode. Here is what it looks like if you are still in Test Mode (first one), and Live Mode (second one):



And that's it! You now have an active Stripe account with plans and customers ready to be charged! Stripe can now be used by your studio admin or yourself to bill your families on either a recurring or one-time basis for literally anything you need to charge them for! Stripe is a very powerful system that can let you easily bill your families on an automatic basis for classes, lessons and more.

***But there's an easier way. Keep reading...***

### **The Easier Way to Automate Your Billing: [StudioBridge](https://StudioBridge.com)**

Using something like Stripe, as we mentioned above, will be completely free of any monthly fees, besides the processing fees you will see in every payment processing software. However, there are many steps you will have to take in order to setup your customer billing the way you would like.

But there's a better way! ***Enter StudioBridge:*** The easier way to automate your billing. StudioBridge will do everything you could hope to do in Stripe and more, in just TWO easy steps!.

After speaking with literally hundreds of studio owners / admins like yourself, we at StudioBridge have come to realize something... Manual billing is tough! What I mean by manual billing is this:

- You are currently accepting checks or cash as payments
- You are manually "posting fees" at the end of each month (or any time) by adding up totals manually and then posting those fees to your family's' accounts (yes, even via software!)

No matter WHO we speak with, we always hear things like this:

“Manual billing is way too time consuming!”

“I’ve been losing money because I just realized a week ago, I’ve been incorrectly entering payment amounts for the past 6 months!!”

“I wish there was an easier way to get paid!!!”

Sound familiar? Well, we have a solution for you. StudioBridge is smart enough to handle all of your billing needs. And the best part of all is it only takes a couple of quick, easy steps to start getting paid! Here’s how it works...

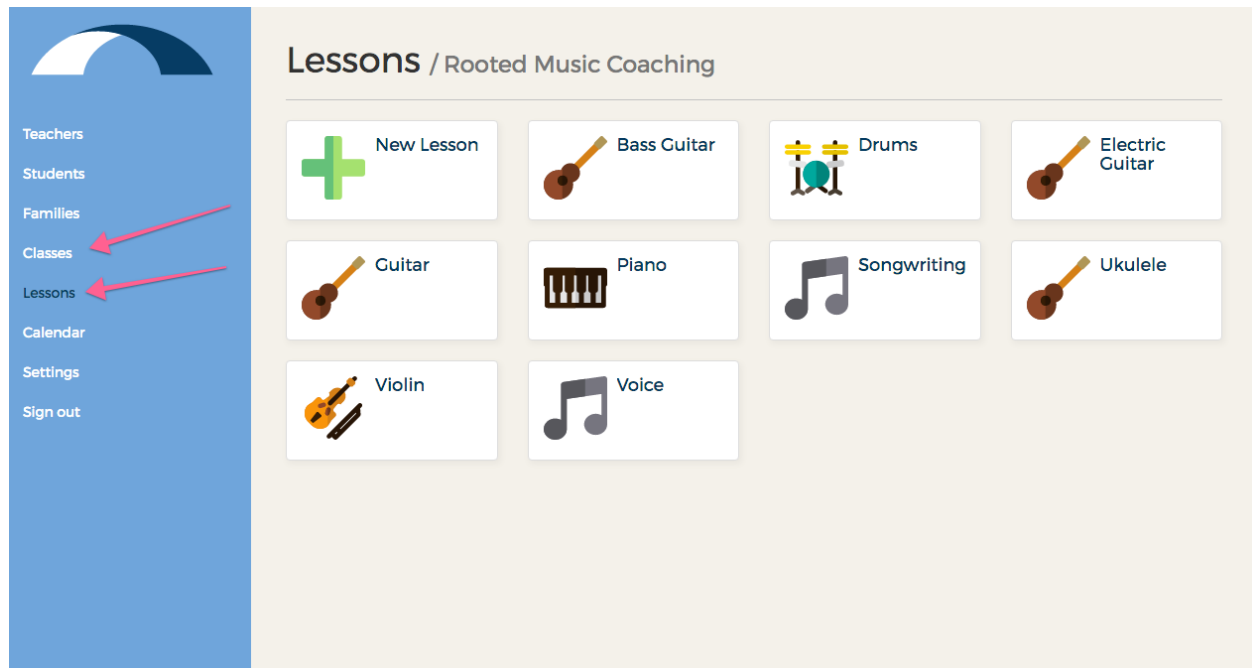
### **Step #1: Set Up the Lessons / Classes Offered**

### **Step #2: Have Customers Register through StudioBridge**

AND... That’s it!! Start watching your hard earned money roll on in automatically. Seriously, that’s it! Here’s how it works..

### **Step #1 Set Up the Lessons / Classes Offered**

Once you have a [StudioBridge](https://StudioBridge.com) account, select the “Lessons” or “Classes” tab on the far left hand side of the panel (as shown below).



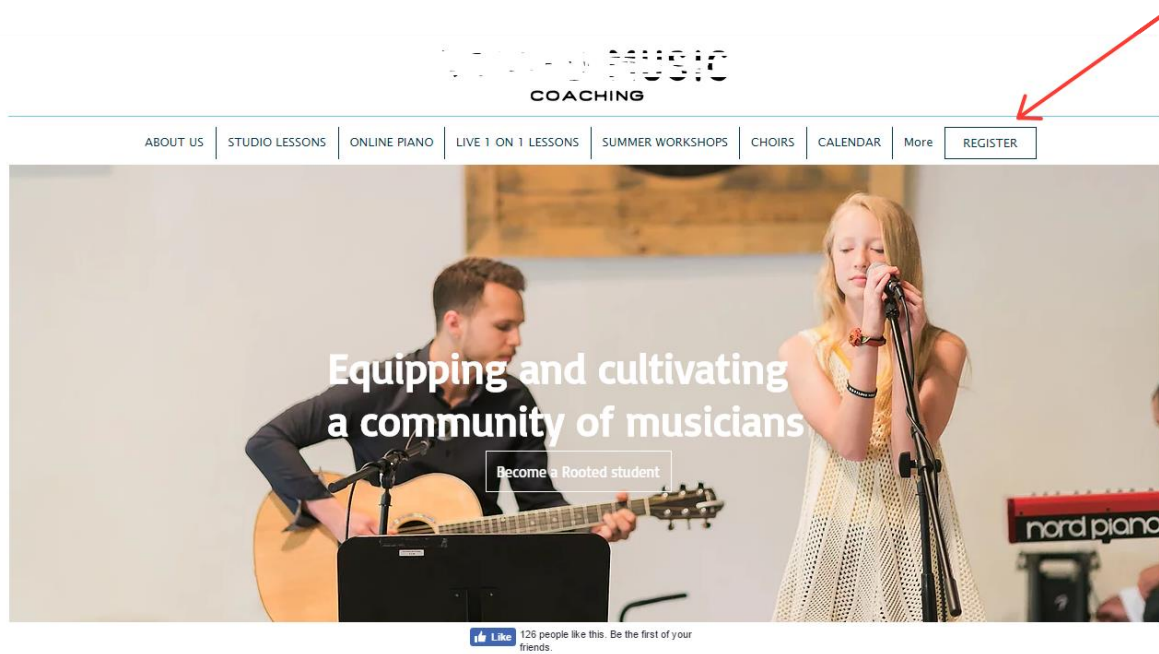
From there you'll select "New Lesson" or "New Class" as you can see from the image above. Simply follow the prompts and your lessons and classes will be set up in no time!

On to Step #2 - the final step!

## **Step #2: Have Customers Register themselves, or register them yourself if you prefer**

Direct your customers to sign up via a "Register" or "Sign Up" button on your website, linking them to your registration page.

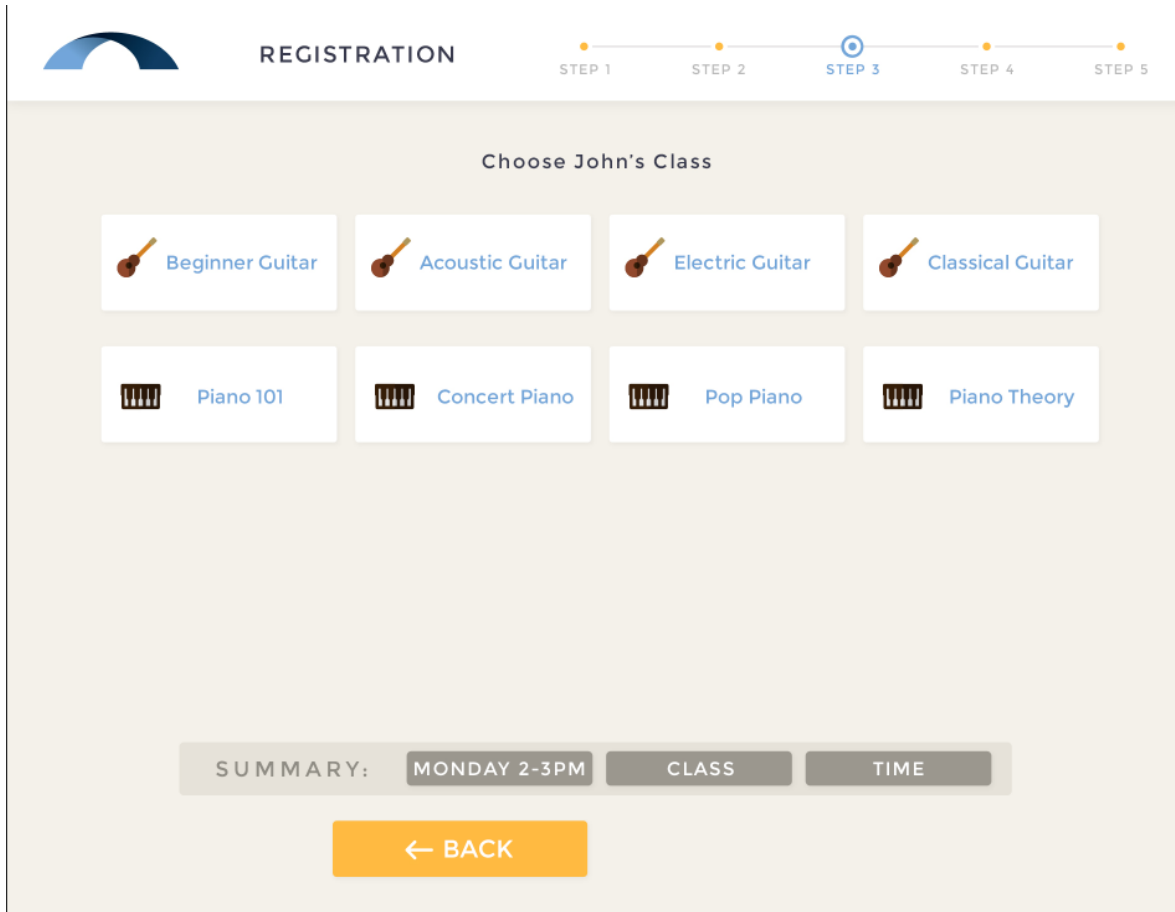




Your customers will then be directed to this page below for them to register quickly and easily. (The name “Rooted Music Coaching” will be replaced with your studio name).

Rooted Music Coaching / Families / Sign up

<b>Parent/Guardian First Name</b> <input type="text"/>	<b>Parent/Guardian Last Name</b> <input type="text"/>
<b>Contact Phone Number</b> <input type="text"/>	<b>Location</b> <input type="text" value="RMC Alpharetta"/>
<b>Account Email</b> <input type="text"/>	<b>Account Password (8 characters minimum)</b> <input type="password"/>
<b>Student Full Name</b> <input type="text"/>	<b>Birth Date</b> <input type="text"/>
<input type="button" value="+ Add Student"/>	<input type="button" value="Next •"/>



studiobridge

REGISTRATION

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5

Choose John's Class

Beginner Guitar Acoustic Guitar Electric Guitar Classical Guitar

Piano 101 Concert Piano Pop Piano Piano Theory

SUMMARY: MONDAY 2-3PM CLASS TIME

← BACK

Customers simply follow the prompts to sign up for the lesson of their choice, and they're done! All you have to do is sit back and watch the money roll in!

Two steps, and you're only your way to NEVER again **dreading the end of the month...** NEVER again **wasting your time preparing invoices or posting fees...** NEVER worrying about **missing out on your hard earned money** due to an inaccurate calculation.

StudioBridge doesn't sleep, doesn't take vacations and most of all doesn't make mistakes. It's smart enough to take care of billing your customers for you, so you can focus on growing your studio.



[StudioBridge.com](https://studiobridge.com)

To schedule your free personalized demo of how StudioBridge can take over all of your billing and tuition collection, visit <https://studiobridge.com> and click the "Schedule A Demo" button.