


#72 - CYMS Training Guide - Youth – Activity Enrollment (Sports / Classes) (10.3 – Updated Sept 2013)

Daily Processing Device Assumption: Global Sales Default = Activity Registrations

(For guidance on *Daily Processing Device Assumption*, See CQG #01c – Daily Processing Device)

Hints and Tips Before You Begin

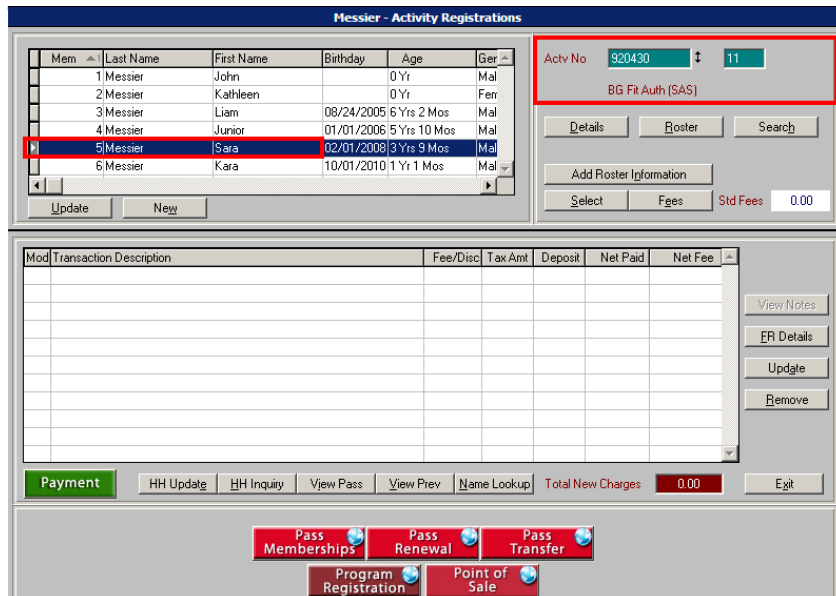
- 1 When entering information into your CYMS database, use proper capitalization. This makes the data easier to read and cleaner looking.
- 2 Picklists can be accessed by right-clicking or pressing **F9** from within any field with a dual arrow next to it . To select an item on a picklist, double click on it.
- 3 Use the **Tab** key to advance to the next field instead of the mouse. If you tab too far, you can use **Shift + Tab** to go back to the previous field.
- 4 To clear the contents of a date field, use the **F8** key to start again.

Enrolling Into an Activity with No Fee

This section covers the process of enrolling children into programs that have no associated fees. This includes any programs for which you require a roster, and your Boys & Girls Club and 4H Club programs.

- 1 Click **Global Sales**.
- 2 Find/ **Select** the household.
- 3 Highlight the child you are trying to enroll in the Family Member Selection browser box, located on the top left part of the screen.
- 4 Right-click or press **F9** in the **Actv No** field and select the program from the picklist.

Note: To find an activity on a picklist, click the **Description** header to re-sort the list alphabetically. Type the first few letters of the program's description on the keyboard.



- 5 Click **Select**. This will move the program to the Current Transaction Listing browser box (aka “shopping cart”), located on the middle of the screen.

- 6 Click **Payment**. You will be taken to the **Global Sales Module Details** screen.
- 7 Insure there are no new charges due on this enrollment and click **OK**.
- 8 Click **Process** or **No Print**.

Enrolling One Child into an Activity with Fees

This section will cover the process of enrolling children into your programs with fees attached. Examples of these programs include sports, trips, instructional programs, etc

Flat Fee (No changes)

- 1 Click **Global Sales**.
- 2 Find/ **Select** the household.
- 3 Highlight the child you are trying to enroll in the Family Member Selection browser box, located on the top left part of the screen.
- 4 Right-click or press **F9** in the **Actv No** field and select the program from the picklist.

Note: To find an activity on a picklist, click the **Description** header to re-sort the list alphabetically. Type the first few letters of the program's description on the keyboard.

- 6 Once you have selected the activity, the **Std Fees** field should fill in with the price.
- 7 Any comments or notes linked to the class will display in the transaction browser area. Click **Hide Notes** once you've read them. These will also print on the receipt.

Messier - Activity Registrations

Mem	Last Name	First Name	Birthday	Age	Gen
1	Messier	John		0 Yr	Mal
2	Messier	Kathleen		0 Yr	Fer
3	Messier	Liam	08/24/2005	6 Yrs 2 Mos	Mal
4	Messier	Junior	01/01/2006	5 Yrs 10 Mos	Mal
5	Messier	Sara	02/01/2008	3 Yrs 9 Mos	Mal
6	Messier	Kara	10/01/2010	1 Yr 1 Mos	Mal

Actv No: 920100 02
Baseball (6-7)

Std Fees: 20.00

Specific Comments:
Assessments: Baseball Fields
March 10, 2008
6-8 yrs 1730-1830
9-10 yrs 1730-1830
11-16 yrs 1845-1945
Parent Meeting at the Y'S Gym Building 1315
March 12 @ 1800
March 13 @ 1000 & 1800
Please call Youth Sports at 380-7044 for more information.

Payment

- Click **Select**. This will move the enrollment to the shopping cart at the bottom of the screen.
- Click **Payment**. You will be taken to the **Global Sales Payment Modules** screen.

Global Payment Update For ==> John Messier

Prev Balance: 19.00
New Fees: 20.00
Net Amt Due: 39.00
Pay Code: 2 Cash
Pay Amt: 0.00

Module	Prev Balance	New Fees	Net Amt Due	New Amt Paid	Auto	Dep/Visit Bal	Dep/Visit Fees	Dep/Visit Due	Dep/Visit Paid	Auto
Actv Reg:	0.00	20.00	20.00	20.00	<input checked="" type="checkbox"/>	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Fac Rsvn:	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Pass Mgt:	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>	19.00	0.00	19.00	0.00	<input type="checkbox"/>
PDS:	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
Rentals:	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Lockers:	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>
Trips:	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
Courts:	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
Trainers:	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
League:	0.00	0.00	0.00	0.00	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
Total:	0.00	20.00	20.00	0.00		19.00	0.00	19.00	0.00	

OK

- Enter the amount being paid in the appropriate **New Amt Paid** field (In this instance: you would enter '20.00' in the Activity row), and click **OK** at the bottom of the screen. You will proceed to the **Global Sales Update** main screen.

- Right-click in the **Pay Code** field and select the appropriate payment type.

Note: If paying by check, enter the check number in the **Pay Ref 1** field.

Global Payment Update For ==> John Messier

Prev Balance 19.00 Split Payment Detail

New Fees 20.00 Pay Code 1

Net Amt Due 39.00 Pay Amt 20.00

Pay Reference 1 Pay Reference 2

Pay User CYS

Pay Date 11/21/2011 Pay Drawer 1

Mod	Transaction Description	Fee/Disc	Tax Amt	Deposit	Net Paid	Net Fee
AR	Class: 920100-02 -> Baseball (6-7) (Sara) Enrolled	20.00	0.00	0.00	0.00	20.00

Total New Charges 20.00

12 Click **Process** and **Print** or **Preview** to print the receipt.

Payment for Second Child Discount

Note: Discount Templates can be created in CYMS to handle multiple Youth Program discount scenarios, such as 'Second Child,' 'Additional Children,' 'Same Child Second Program', etc. The following steps detail the *'manual'* method for applying discounts only. For more information on establishing automated Discount Templates, contact VSI.

- 1 Repeat **Steps 1-8** from the **Enrolling One Child Into An Activity with Fees** section above for the first child to get the first enrollment into the Shopping Cart
- 2 Repeat **Steps 1-7** from the **Enrolling One Child Into An Activity with Fees** section above for the second child.
- 3 Click **Fees**. The Fees screen will appear.

(920100:02) for Liam Messier

Valid	Code	Description	Req	FeeCodes	Dsc	Fee Amt	Count	Qty	Disc Amt	(N/A)	Net Fee
<input checked="" type="checkbox"/>	Y1-SP	YS1-Sports Fees	No		Yes	18.00	1.00	1	2.00		16.00
<input type="checkbox"/>		Not Selected	No		No	0.00	0.00	0	0.00		0.00
<input type="checkbox"/>		Not Selected	No		No	0.00	0.00	0	0.00		0.00
<input type="checkbox"/>		Not Selected	No		No	0.00	0.00	0	0.00		0.00
<input type="checkbox"/>		Not Selected	No		No	0.00	0.00	0	0.00		0.00
<input type="checkbox"/>		Not Selected	No		No	0.00	0.00	0	0.00		0.00
<input type="checkbox"/>		Not Selected	No		No	0.00	0.00	0	0.00		0.00
<input type="checkbox"/>		Not Selected	No		No	0.00	0.00	0	0.00		0.00
<input type="checkbox"/>		Not Selected	No		No	0.00	0.00	0	0.00		0.00
<input type="checkbox"/>		Not Selected	No		No	0.00	0.00	0	0.00		0.00

Note:

Ref/Reg Type Net Fees Charged For This Enrollment **16.00**

- 4 Change the fee in the **Fee Amt** at the top center of the screen to the amount you will charge for the second enrollment.
- 5 Click **OK**.
- 6 Repeat **Steps 9-12** from the **Enrolling One Child Into An Activity with Fees** section above.

Payment Using Coach's Discount (One Child)

- 1 Repeat **Steps 1-10** from the **Enrolling One Child into an Activity With Fees** scenario above.
- 2 On the **Global Sales** screen right-click in the **Pay Code** field and select the **Coach's Discount Pay Code**.
- 3 Enter the amount of the Coach's Discount in the **Pay Amt** field and add a note in the **Pay Ref 1** field. Then click **Add Split Pmt**. The payment will move to the **Split Payment Detail** browser, located on the upper right-hand side of the screen. The **Pay Amt** field will display the amount left.
- 4 Right-click in **Pay Code** field again and select the proper pay code for the remainder due. Click **Split Payment** again to add that line to the browser.

Global Payment Update For ==> John Messier

Prev Balance	19.00		
New Fees	36.00	Pay Code	2 Cash
Net Amt Due	55.00	Pay Amt	0.00
Pay Reference 1	<input type="text"/>		
Pay Reference 2	<input type="text"/>		
Pay User	CYS	Process	
Pay Date	11/21/2011	Pay Drawer	1

Split Payment Detail			
Delete Split Pmt			
Pay Type	Amt Paid	Reference Line 1	Reference Line 2
2	15.00		
35	20.00	Father is coaching	
Total Paid		36.00	

Mod	Transaction Description	Fee/Disc	Tax Amt	Deposit	Net Paid	Net Fee
AR	Class: 920100-02 -> Baseball (6-7) (Liam) Enrolled	16.00	0.00	0.00	0.00	16.00
AR	Class: 920100-02 -> Baseball (6-7) (Sara) Enrolled	20.00	0.00	0.00	0.00	20.00

View Notes
FR Details
Update
Remove

Total New Charges 36.00

Payment
HH Update
HH Inquiry
View Pass
View Prev
Name Lookup
Exit

Pass Memberships
Pass Renewal
Pass Transfer

Program Registration
Point of Sale

5 Click **Process** and Print and/or Preview on the following screen.

Enrolling One Child into an Activity Set Up for Installment Billing

This section will cover the process of enrolling children into your programs with fees with fees applied via Installment Billing.

The following example assumes that:

- Your Youth Programs Installment Billing Template is set to **Auto Generate** installment bills at the time of enrollment.
 - The Sponsor will be billed on the **1st** of every **Month** for this activity beginning “next” month.
 - Your template allows for Installment Billing only.
 - No Second Child or Coach’s Discounts apply
- 1 Repeat **Steps 1-12** from the **Enrolling One Child Into An Activity with Fees** section above.
 - 2 Upon completion of the enrollment, go to **Inquiry → Global → Global Household Inquiry** or click the **Household Inquiry** hot button
 - 3 Find/**Select** the household.
 - 4 Click the **Billing** tab in the middle of the screen. You will see a list of the Household's Installment Bills.
 - 5 Highlight the Installment Billing Record that corresponds to the class for which you just processed the enrollment and click **Schedule**
 - 6 You will see a list of **Unbilled** Records beginning with the next billing cycle.

Bill Schedule: Sara Messier (Tiger Cub W/Y/O)

Module	ID	Date	Status	Bill Amt	Disc Amt	AutoPay	Net Bill Amt
AR	900000-01	12/01/2011	Unbilled	40.00	0.00	0.00	40.00
AR	900000-01	01/01/2012	Unbilled	40.00	0.00	0.00	40.00
AR	900003-05	02/01/2012	Unbilled	40.00	0.00	0.00	40.00
AR	900003-05	03/01/2012	Unbilled	40.00	0.00	0.00	40.00
AR	900007-01	04/01/2012	Unbilled	40.00	0.00	0.00	40.00
AR	900007-01	05/01/2012	Unbilled	40.00	0.00	0.00	40.00
AR	910025-01	06/01/2012	Unbilled	40.00	0.00	0.00	40.00
AR	910055-01	07/01/2012	Unbilled	40.00	0.00	0.00	40.00
AR	920144-01	08/01/2012	Unbilled	40.00	0.00	0.00	40.00
		09/01/2012	Unbilled	40.00	0.00	0.00	40.00
		10/01/2012	Unbilled	40.00	0.00	0.00	40.00
		11/01/2012	Unbilled	40.00	0.00	0.00	40.00
		12/01/2012	Unbilled	40.00	0.00	0.00	40.00
		01/01/2013	Unbilled	40.00	0.00	0.00	40.00
		02/01/2013	Unbilled	40.00	0.00	0.00	40.00
		03/01/2013	Unbilled	40.00	0.00	0.00	40.00
		04/01/2013	Unbilled	40.00	0.00	0.00	40.00
		05/01/2013	Unbilled	40.00	0.00	0.00	40.00
		06/01/2013	Unbilled	40.00	0.00	0.00	40.00
		07/01/2013	Unbilled	40.00	0.00	0.00	40.00

<< Back

7 Click **Back** and **Exit** to return to the main CYMS screen.