

72b - CYMS Quick Guide – Youth Enrollment - Billed Activity (Classes) (10.3 – Updated May 2011)

Daily Processing Device Assumption: Global Sales Default = Activity Registrations
(For guidance on *Daily Processing Device Assumption*, See CQG #01c – Daily Processing Device)

When to Use: When enrolling children into instructional classes that are going to be billed every month.

NOTE: Refer to the Youth Activity Setup guide (CTG-70) to make sure the activity is correctly established for Installment Billing before you start enrolling children. The steps in this guide use the following Installment Billing assumptions:

- 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** beginning “next” month.
- Your template allows for Installment Billing or Auto Debit from Credit Card.
- You charge a non-refundable registration fee (IB Init Amount) which is due at the time of enrollment.

Enrollment - Youth Installment-Billed Activity/Class:



1. Click the **Global Sales** button.
2. Select the sponsor or child.
3. Highlight the child to be enrolled
4. Right-click or press **F9** in the **Actv No** field located on the upper right-hand corner of the screen to launch the **Section Listing** picklist.
5. Select the Activity.
6. Select whether this patron wishes to be billed in CYMS and make their payment in CYMS (**Installment Bill Only**) or if they want their billing to hit their Credit Card (**Auto Debit from Credit Card**).
7. Click **OK**
8. If you selected **Installment Bill Only** go to Step 11-15
9. If you selected **Auto Debit from Credit Card**, (realize you must be connected to an MX830 device) click **Add** (even if the card number already listed in the browser).
10. At this point the MX830 will be activated and the patron or clerk should enter their credit card information into the Mx830 **manually** – you cannot swipe the card here! Then click **Select**. Then go to Step 11-15
11. Click **Select** to move the activity into your Browser or ‘shopping cart’

NOTE: The non-refundable Registration Fee discussed above will be displayed in the **New Fees** field. In this scenario, Installment Bills will be created ‘behind the scenes,’ and billing will typically start on the first of ‘next’ month (these details are contained in the Installment Billing Template).

12. Click **Payment**.
13. Enter the amount being paid in the white **New Amt Paid** field where it meets the **Actv Reg:** row and click **OK** at the bottom of the screen.
14. Choose the appropriate **Pay Code** and enter a **Pay Reference** if appropriate.
15. Click **Process**.