



Allowing a customer to make partial payments

Business Case:

A student or parent approaches the bookkeeper and wishes to purchase an item, but needs to spread the payments over time

Examples

- Pay to participate fees – the parent cannot afford to pay the complete fee – sometimes in excess of \$100 per student at one time
- Club national conference fees of many hundreds of dollars – the student will be doing fundraising and other activities to pay the fee over time
- Registration fees
- Yearbook – payments over time

Procedure Scenarios – these are TWO step processes

1. If the customer tells you prior to the sale (“I am on the cheer team and the uniform costs \$500, I need to pay overtime..”)
2. The customer tells you **during** the sale they need a payment plan

Scenario I

1. Lookup student or select the **Lookup Student** function button
2. Select **ENTER FEES** function button
3. Select the ITEM(s) to be fee’d or charged¹
4. When completed with the items, select **Finish Sale**
5. Select **Commit**

At this point the student has these charges on their account, step II

6. Lookup student or select **Lookup Student** and select your student
7. There will be an alert box for **open fees**, select FEES²
8. Select the fee the customer wishes to pay (partially pay) by marking the small box to the left of the fee and click on the **pay** button bottom right corner
9. The selected FEE due is in the receipt box – click on the FEE which is shown at full amount
10. An alert box is displayed, select **Price and enter the amount the customer is going to pay now**
11. Other items can be selected and paid at this time
12. Select **Finish Sale** and tender out the transaction

Scenario II

In this scenario the bookkeeper is in the middle of a transaction and the customer alerted they cannot pay for either everything – or part of one item.

1. The transaction is in progress – the student has been selected
2. Select the **Enter Fines** function button – the current sale is cleared and Enter Fees mode is displayed
3. Follow scenario I, from Step 3

¹ Fee transactions will turn red in the receipt box

² There could be more fees than the ones entered and/or the student could have fines