

Collecting Payments



Jenny Peak, Marketing Coordinator

Today's Agenda:

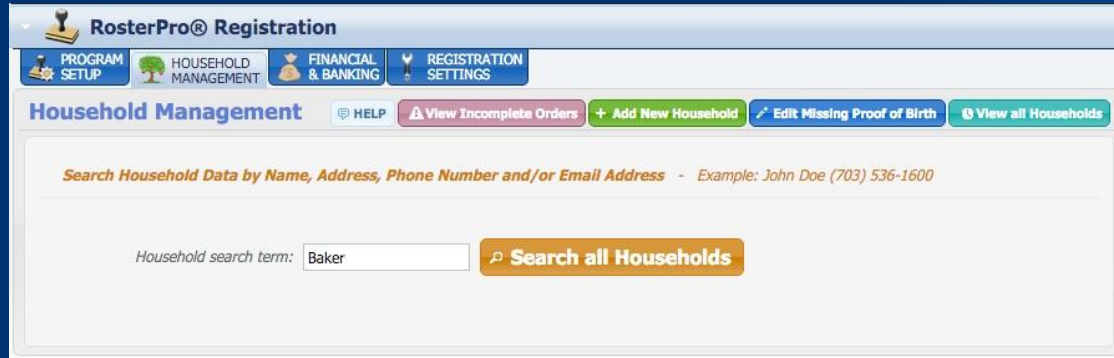
- Record Cash/Check Payments
- Manage Installments
- Make Payments
- Update Method of Payment
- Make Past Due Payments



Record Cash/Check Payments

Johnny Baker hands you cash at practice. Now you need to record that payment in his account.

- Navigate to Order
 - RosterPro Registration dashboard
 - Household Management tab
 - Search for Household (*Baker*)



The screenshot displays the RosterPro® Registration dashboard. At the top, there's a navigation bar with four tabs: PROGRAM SETUP, HOUSEHOLD MANAGEMENT (which is selected), FINANCIAL & BANKING, and REGISTRATION SETTINGS. Below the tabs, there's a section titled "Household Management" with several buttons: HELP, View Incomplete Orders, Add New Household, Edit Missing Proof of Birth, and View all Households. A search instruction reads: "Search Household Data by Name, Address, Phone Number and/or Email Address - Example: John Doe (703) 536-1600". Below this, there's a search form with the label "Household search term:" followed by a text input field containing the word "Baker". To the right of the input field is an orange button labeled "Search all Households".

- Registration Order History tab
 - Select related order
 - Record A Payment button

The screenshot displays the 'Household: Baker' interface. At the top, the Household ID is 51d6fd8e3486eb7e0b0000b4. The 'Registration Order History' tab is selected. Below the tabs, the 'All Household Orders' section shows a list of orders by date. The order for 6/10/2015 is highlighted. The 'Order Overview' section for this order shows it was processed on Wednesday - June 10th 2015, 10:56:47, submitted by Kris Baker, and has a remaining balance of \$40.00. The 'Record Payment' button is highlighted with a red box.

Household: Baker Household ID: 51d6fd8e3486eb7e0b0000b4

Household Information & Members **Registration Order History** Search Participants Data Search Volunteers Data

All Household Orders Help

ORDERS BY DATE

- » 9/27/2015
1 REGISTRATIONS
- » 8/18/2015
1 REGISTRATIONS
- » **6/10/2015**
1 REGISTRATIONS
- » 6/10/2015
1 REGISTRATIONS


Order Date: 6/10/2015 **Pay with CC** **Record Payment** Refund Manage Unpaid Payments

Order Overview

Processed on: **Wednesday - June 10th 2015, 10:56:47** Remaining Balance: **\$40.00**



Submitted by: **Kris Baker** Payment Method: **CHECK**
<kbaker@example.com>

- Enter payment amount, date, optional notes


Record Payment for Order #5578502f6772615dd8c71d00

Show Fees	Item Name	Price	Amount Paid	Next Installment Amount	Payment Amount	Registration Status	Amount Remaining
<input checked="" type="checkbox"/>	Crafty Baker - Summer Camp 2015 Summer Fun	\$80.00	\$40.00	<input type="checkbox"/> \$40.00	\$ <input type="text" value="40.00"/>	ACTIVE	\$0.00
	↳ U5-U8 Registration Fee (discounted)	\$80.00	\$40.00	↳ <input type="checkbox"/> \$40.00	\$ <input type="text" value="40"/>		\$0.00
Total Payment Amount					\$ <input type="text" value="40.00"/>		

Total Order Balance Due
\$40.00

Additional Payment Details
 Payment Type: 
 Payment Date: 
 Remark:

Note : Payments on items with installments will be applied sequentially in the order they are due. If a payment exceeds the next installment amount, the remainder is applied to the subsequent installment.

Manage Installments

You've decided to collect payments in installments for a new season. You need to setup the installments in your Season Settings.

- Seasonal Registration Setup
- Season Settings
- Installment Payment Options

The screenshot displays the 'Seasonal Registration Setup' interface for the 'Competitive - Fall 2015' season. The interface includes a top navigation bar with tabs for 'Season Settings', 'Fees & Discounts', 'Season Structure', 'Participant Form', 'Volunteer Settings', and 'Registration Management'. The 'Season Settings' tab is active, showing various configuration options. The 'Installment Payment Options' section at the bottom is highlighted with a red rectangle. It indicates that no installment options are currently selected, meaning registrations will be paid in full. Other visible sections include 'Seasonal Dates/Times', 'Additional Emergency Contact', 'Seasonal Welcome Message', 'Seasonal Confirmation Message', 'Seasonal Waiver', 'Season Eligibility/Registration Limit Settings', and 'Financial Aid'.

Seasonal Registration Setup ** Competitive - Fall 2015 **

Season Settings | Fees & Discounts | Season Structure | Participant Form | Volunteer Settings | Registration Management

Seasonal Registration Settings Help

Seasonal Dates/Times Edit Dates/Times
Registration OPENS: NOT SET
Registration CLOSES: NOT SET

Additional Emergency Contact Edit Additional Contact Info
Parent Info Collection is currently **OFF** for this season
Emergency Contact Collection is currently **OFF** for this season
Medical Insurance Collection is currently **OFF** for this season

Seasonal Welcome Message Edit Welcome
** No welcome message assigned. Using domain default message. **

Seasonal Confirmation Message Edit Confirmation
** No confirmation message assigned. **
Registrants will receive a confirmation message via email that includes the message setup under 'registration settings', plus any additional text added here.

Seasonal Waiver Edit Waiver
** No waiver message assigned. Using domain default waiver. **

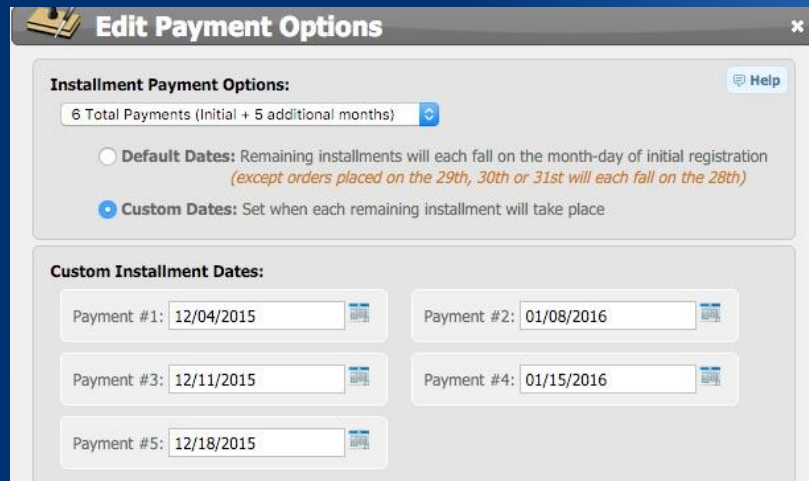
Season Eligibility/Registration Limit Settings Edit Eligibility/Limit
Season Eligibility: NO CONSTRAINTS
Registration Limit: NO LIMIT
Invite Only: OFF

Financial Aid: OFF Edit Options
** Financial Aid Turned off **

Allow multiple registrations for the same Participant Edit option

Installment Payment Options Edit Payment Options
** No installment options selected - registrations will be paid in full **

- Customize the number of installments
- Default Dates vs. Custom Dates



The screenshot shows a window titled "Edit Payment Options" with a close button in the top right corner. Inside the window, there is a section titled "Installment Payment Options:" with a "Help" button to its right. Below this title, there is a dropdown menu showing "6 Total Payments (Initial + 5 additional months)". Below the dropdown, there are two radio button options: "Default Dates: Remaining installments will each fall on the month-day of initial registration (except orders placed on the 29th, 30th or 31st will each fall on the 28th)" and "Custom Dates: Set when each remaining installment will take place". The "Custom Dates" option is selected. Below this section, there is a section titled "Custom Installment Dates:" containing five date input fields labeled "Payment #1" through "Payment #5". The dates entered are: Payment #1: 12/04/2015, Payment #2: 01/08/2016, Payment #3: 12/11/2015, Payment #4: 01/15/2016, and Payment #5: 12/18/2015.

Edit Payment Options

Installment Payment Options: [Help](#)

6 Total Payments (Initial + 5 additional months)

☐ **Default Dates:** Remaining installments will each fall on the month-day of initial registration
(except orders placed on the 29th, 30th or 31st will each fall on the 28th)

☒ **Custom Dates:** Set when each remaining installment will take place

Custom Installment Dates:

Payment #1: 12/04/2015

Payment #2: 01/08/2016

Payment #3: 12/11/2015

Payment #4: 01/15/2016



Payment #5: 12/18/2015

Default Dates: Use if you are running a registration that will be open year round

Custom Dates: Use mainly if you want to have all payments for everyone taken on the same day. If you go with this option you will have to set Payment #1 **AFTER** your registration Program Closed Date

Paying Installments

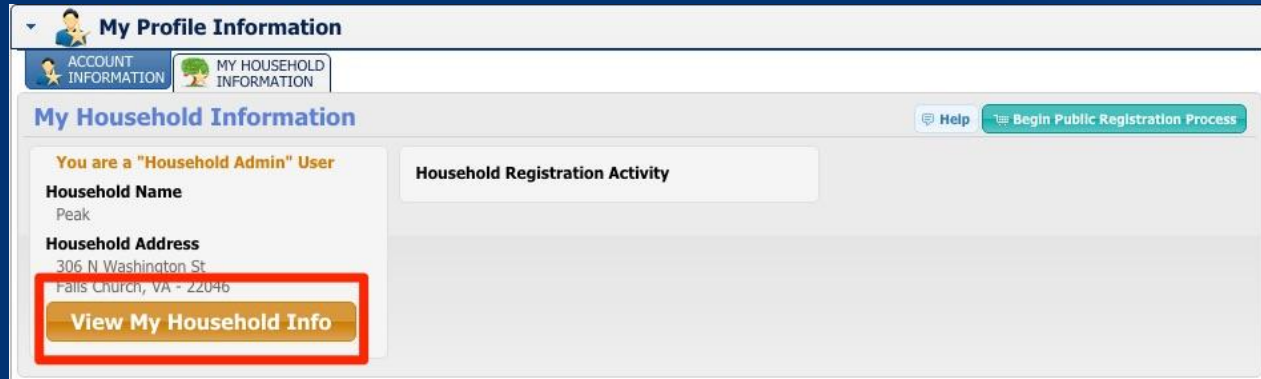
- Installment payments will be taken out automatically on the scheduled payment dates
- Early payments must be accepted as cash/check - record the same way you would in the “Record Cash/Check” section

Order Payment Schedule		
Date	Registration Information	Amount
	Sally Test Competitive Fall 2015 - U12 (Payment 1 of 6) \$25.00	
	Sally Test Competitive Fall 2015 - U12 (Payment 2 of 6) \$25.00	
	Sally Test Competitive Fall 2015 - U12 (Payment 3 of 6) \$25.00	

Making A Payment

A Household wants to make a payment on their account for a previous registration. They've asked for instructions on how to make the payment via Credit Card.

- My Profile Information
- My Household Information tab
- View My Household Info button



The screenshot displays a web application interface for managing household information. At the top, there is a navigation bar with a dropdown arrow and a user icon, followed by the text 'My Profile Information'. Below this, there are two tabs: 'ACCOUNT INFORMATION' (with a star icon) and 'MY HOUSEHOLD INFORMATION' (with a tree icon). The 'MY HOUSEHOLD INFORMATION' tab is currently selected. On the right side of the tab, there are two buttons: 'Help' and 'Begin Public Registration Process'. The main content area is divided into two columns. The left column contains the text 'You are a "Household Admin" User' in orange. Below this, there are two sections: 'Household Name' with the value 'Peak' and 'Household Address' with the value '306 N Washington St, Falls Church, VA - 22046'. A red rectangular box highlights the 'View My Household Info' button located at the bottom of the address section. The right column is titled 'Household Registration Activity' and is currently empty.

My Profile Information

ACCOUNT INFORMATION MY HOUSEHOLD INFORMATION

My Household Information Help Begin Public Registration Process

You are a "Household Admin" User

Household Name
Peak

Household Address
306 N Washington St
Falls Church, VA - 22046

View My Household Info

Household Registration Activity

- Registration Order History tab
- Select an order to pay on the left side
- Pay With CC green button

Household: Peak
Household ID: 54c16d4abc575e63e600a39d

Registration Order History
View Participant Data
View Volunteer Data

All Household Orders

ORDERS BY DATE

» 11/4/2015
1 REGISTRATIONS

Incomplete Order: 11/04/2015

Order Date: 11/4/2015

Pay with CC

Order Overview

Processed on: Wednesday - November 4th 2015, 11:15:17
Submitted by: Jenny Peak
<jpeak@demosphere.com>

Remaining Balance: **\$505.00**
Payment Method: CASH

Order Items

Registrant

Sally Test

Birthdate: 02/04/2003

FEMALE

Registration Info

Program: Us Rec Soccer
Season: 2015/2016 - Example 2
Group: U14

Registration Status: **PENDING PAYMENT**



Fees and Discounts

Late Fee	\$10.00
U8 Academy + Summer	\$495.00
Registration Total	\$505.00

Registration ID: 563a2f166772616dc2720200


Order Total **\$505.00**




- Enter credit card information
 - American Express also accepted (not pictured here)
- Submit Payment

 **Make a Payment** 

Item Name	Total Amount	Amount Due	Amount To Pay
Sally Test Us Rec Soccer 2015/2016 - Example 2 - U14	\$505.00	\$505.00	\$505.00
Total Payment Amount:			\$505.00

Payment Information

Select payment type: 

Selected Payment Method: Credit Card   

Cardholder's Name

Country

Billing Address

City


State

ZIP

Card Number

Security Code

Expiration /



Amount to Pay: \$505.00

Cancel **Submit Payment**

Updating Method Of Payment

A Household has an expired Credit Card on file and needs to update their payment information. They've asked for your help figuring out how to make the change.

- My Profile Information dashboard
- My Household Information
- View My Household Info

The screenshot displays a web interface for 'My Profile Information'. At the top, there are two tabs: 'ACCOUNT INFORMATION' and 'MY HOUSEHOLD INFORMATION'. Below the tabs, the section 'My Household Information' is visible, featuring a 'Help' link and a 'Begin Public Registration Process' button. The main content area shows the user's role as a 'Household Admin' and lists household details: 'Household Name' (Peak), 'Household Address' (306 N Washington St, Falls Church, VA - 22046), and a 'Household Registration Activity' section. A red rectangular box highlights the 'View My Household Info' button at the bottom of the household details section.

- Registration Order History tab
- Select a specific order with payments remaining
- Edit Payment Info

The screenshot displays a web application interface for managing registration orders. At the top, there are three tabs: 'Registration Order History' (selected), 'View Participant Data', and 'View Volunteer Data'. Below the tabs is a header section titled 'All Household Orders' with a 'Help' button on the right. The main content area is divided into two columns. The left column, titled 'ORDERS BY DATE', lists two orders for the date 11/4/2015: one with 2 registrations and another with 1 registration. Below this list is a button labeled 'Incomplete Order: 11/04/2015'. The right column, titled 'Order Overview' for the date 11/4/2015, displays order details. It shows the order was processed on Wednesday - November 4th 2015 at 13:11:47, submitted by Jenny Peak (jpeak@demosphere.com), and has a remaining balance of \$1,171.34. The payment method is listed as VISA. A red rectangular box highlights the 'Edit Payment Info' button, which is located at the bottom right of the order overview section.

Registration Order History | View Participant Data | View Volunteer Data

All Household Orders

Help

ORDERS BY DATE

- » 11/4/2015
2 REGISTRATIONS
- » 11/4/2015
1 REGISTRATIONS

Incomplete Order: 11/04/2015

Order Date: 11/4/2015

Order Overview

Processed on: **Wednesday - November 4th 2015, 13:11:47**

Submitted by: **Jenny Peak**
<jpeak@demosphere.com>

Remaining Balance: **\$1,171.34**

Payment Method: **VISA**
(ending 1111)

[Edit Payment Info](#)

- Add updated credit card information

Update Payment Info

Payment Information

Select payment type:

Selected Payment Method: Credit Card

Cardholder's Name First Name Last Name

Country United States

Billing Address

City

State

ZIP

Card Number

Security Code

Expiration 01 / 2015

Cancel **Update Payment Info**

Must select Update All in order for the system to apply the card to all installments. If not, it will only charge the account one time and you will have to come back in and do it again.

Make Past Due Payments

You've discovered a Household has two past due payments on their account and want to send them a quick email reminder. You want to include steps for how to make the payment.

- Popup dialog box will appear upon login
 - For all Household Administrators with a Household Order past due
- Option to Pay Now
- Redirects to the Order on the My Household page

 **Please Resolve Past Due Payments** ✕

Order Processed on: **Wednesday - April 22nd 2015, 14:18:58**

Amount Due: **\$18.00**

REGISTRATION **Test2 CSTC**

Rec Soccer Fall 2015 - U16

\$18.00



Order Processed on: **Thursday - June 4th 2015, 16:44:02**

Amount Due: **\$103.50**

REGISTRATION **Mo Baker**

Rec Soccer Fall 2015 - U16

\$43.50

REGISTRATION **Crazy Dave**

Rec Soccer Fall 2015 - U6

\$30.00

REGISTRATION **Demo4 Person**

Rec Soccer Fall 2015 - U8

\$30.00



More Information On RosterPro!

- Best-In-Class Support
support@demosphere.com
- Demosphere Blog
 - [Removing Volunteer Opt-Out Fees](#)
 - [Pay In Full Discounts](#)
 - [Update Your Payment Method](#)
 - [Adjust And Schedule Payments](#)
 - [New Options For Check/Cash Registrations](#)





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