

May 2009

## New Feature: On Account

The latest version of SportsMan SQL includes an On Account feature for offering billing options to your patrons. This functionality allows your patrons to accumulate charges before they are applied to their account or charged to a credit card or bank account. This will allow you to bill on a regular basis for those charges that they accumulate over a period of time. Facilities offering daycare services may benefit greatly from this feature. This will allow their daycare charges to accumulate before they are billed at the end of a cycle.

There are two types of allowed billing: Self billing and Corporate Sponsor billing. Self billing will charge the account balance to the individual incurring the charges. Corporate Sponsor billing will allow individuals to charge items to a corporate sponsor's account.

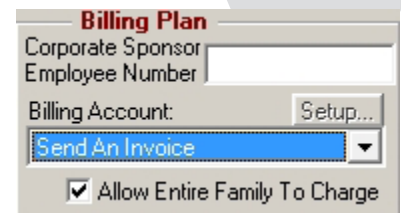
## Enabling and Configuring On Account

The On-Account feature must be enabled by going to *File > Administration > Site Configuration*. Choose your site and click *Edit*. Click the *Financial* tab and then click the *On Account Billing* tab in the bottom right corner.

Enable On Account for the payment methods you wish to allow. You can also customize the invoice that will be printed for On Account billing. If On Account billing is enabled, and Corporate Sponsor billing will be used, go to the sponsor's definition in *File > Maintain Tables > Memberships > Corporate Membership Sponsors*. Create the sponsor or edit an existing one by going to the *On Account Billing* tab and check *Enable On Account Billing* for that sponsor. The sponsor must then be tied to an individual in the system where the charges will be applied. Next to *Member Account to Receive Charges* click the *Select* button and choose the account to use for the sponsor. If you are creating a new account and would like to use a company name instead of an individual, split the company name and place the first part into the First Name field and the second into the Last Name field.

Once the On Account feature is enabled in SportsMan SQL, a patron's account can then be enabled to allow charges. Look up a patron and select their name in the group listing and click the *Modify* button.

Select which type of billing to use for the patron's account, whether it will be by invoice, by credit card, bank draft or billed to a corporate sponsor, and whether all members of the family group will be allowed to charge items to the account. The setup button will be enabled for entering credit card or bank account details.



## Using On Account

After the On Account feature is enabled, a new payment button will appear on the cash register checkout screen. Choose the On Account payment type and the patron's account to which the charges will be applied. If the sale is for an activity registration or other item where a patron's name has already been selected, the charge will be automatically applied to their account if the billing account in their billing plan has been specified.

## Processing Charges

When an account is charged, there will be an entry in the financial details describing the payment as *On Account - Unbilled*. To process the charges, go to *Action > Financial > View / Process On Account Charges*. If the patron is to be billed by invoice, the payment description will change to *On Account - Billed* and the charges will be applied to their balance which will reflect as outstanding until paid. If the patron is to be billed by credit card or bank draft, then the payment will be processed according to SportsMan SQL's credit card processing settings found in *File > Administration > Site Configuration*, then by clicking on the *Financial* tab.



Phone: (801) 572-3570  
Email: sales@peakinfo.com  
Web: www.peakinfo.com