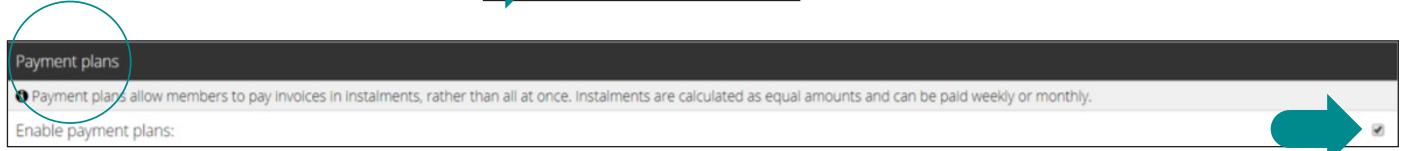
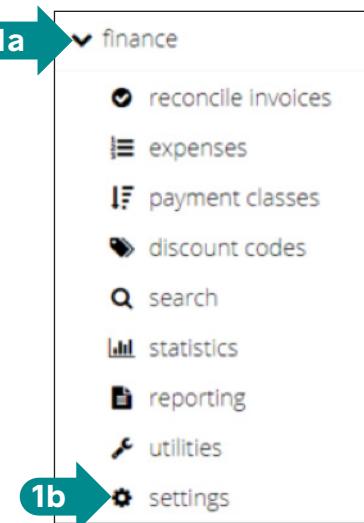


How to Set Up a Payment Plan

Hockey Australia and state fee are mandatory at the point of registration however club fees can be payed via a payment plan if requested.

The below takes you through step-by-step in how to set up a payment plan for a member.

Step 1: Ensure that payment plans are enabled via **Finance > Settings > Payment plans** and ticking the 'enable payment plan' box. Please remember to press 'Save settings' at the bottom of this page once completed.



Step 2: Set up a \$0 payment plan product that allows members to pay for the mandatory HA and state registration fees at the point of registration without having to pay for the club fee at that time.

A screenshot of a software interface showing the 'Payment classes' page. A circled 'add payment class' button is shown. The page lists 'Active payment classes' and 'Inactive payment classes'. A large green arrow labeled '2a' points to the left sidebar where 'payment classes' is selected. Another green arrow labeled '2b' points to the 'add payment class' button.

Type	Payment class	Amount	Actions
Registration fees	HA TEST	\$0.00	<input type="checkbox"/> edit <input type="checkbox"/> deactivate <input checked="" type="checkbox"/> delete
Other fees			
Registration add-ons			
Inactive payment classes	Type Payment class		

Go to **Finance > payment class > Add Payment Class**

Select registration fee and enter the amount at \$0. Please ensure you save the payment class once complete.

A screenshot of a software interface showing the 'Add payment class' form. The 'Type' dropdown is set to 'Registration fee'. The 'Name' field contains 'Payment plan product'. The 'Amount' field has '\$0' entered. A circled 'Registration fee' is shown in the type dropdown. A large green arrow labeled '2a' points to the 'Type' dropdown. Another green arrow labeled '2b' points to the '\$0' amount in the 'Amount' field.

How to Set Up a Payment Plan

Step 3: Set up the **Payment plan** fee by going to **finance > payment classes > add payment class**

The screenshot shows the 'Payment classes' section of the software. It includes a note about email addresses, a table for 'Active payment classes' (with one entry for 'Hockey WA - Stick2Hockey Levy (8 and under) - 2020 (\$0.00)'), and a table for 'Inactive payment classes' (empty). A large green arrow labeled '3a' points to the 'add payment class' button at the top right of the page.

In the 'fee type' select **other** and then enter the club amount that will be charged through the payment plan.

The screenshot shows the 'Payment class details' form. The 'Type' dropdown is set to 'Other fee'. The 'Name' field is empty. The 'Amount' field contains '\$ 400'. A large green arrow labeled '3d' points to the amount input field.

Step 4: Once created, you can invoice the '**other**' fee linked to the club amount to your members.

To do so go to the **members profile** by clicking on their name in the member list.

The screenshot shows the 'Members overview' screen. It displays a summary with 2 members total, a pie chart for gender, and a table of member details (Lenegan, Ryan, 01/01/2019, UNPAID; Test, HA, 14/01/2015, PAID HA TEST). A large green arrow labeled '4b' points to the search bar.

Step 5: Click **invoice member (a)** on the right-hand side of their profile and then select **by payment class (b)** within 'Select invoice type'.

The screenshot shows the 'View member' screen for a member named 'Test'. It includes a 'Basic details' section with fields like National ID Number (153007), First name (HA), Last name (Test), Date of birth (14th January 2015), Gender (Male), and Registered on (Fri 10 Jan 2020 13:00). A large green arrow labeled '5a' points to the 'edit member' option in the sidebar. Below the member details, there are sections for 'Inpaid invoices' (empty) and 'Paid invoices' (one entry for 'HA TEST' with Reference 'MR1' and Received '\$0.00'). At the bottom, a dropdown menu for 'select invoice type' has 'By payment class' highlighted, indicated by a green arrow labeled '5b'.

How to Set Up a Payment Plan

Step 6: Select the 'other' fee in the dropdown and then enter the payment plan details below.

The screenshot shows a software interface titled 'Issue new invoice'. Under 'Select invoice type:', there is a dropdown menu labeled 'By payment class'. Below it, a note says: 'Select the fee type under which the member will be issued an invoice. Members can only be invoiced once for "Registration" fees, but as many times as you like for "Other" fees (for example, merchandise or insurance). To add more fees, visit [1F](#) payment classes.' A dropdown menu for 'Fee type:' is open, showing 'Please select...' at the top and 'Other (\$400.00)' highlighted with a red circle.

Step 7: Once the instalments and frequency has been set click **generate invoice**.

The screenshot shows a software interface titled 'Set up payment plan'. It includes a note: 'You can specify the number and frequency of instalments below. Note that where an amount does not divide evenly into the number of instalments, the remaining amount will be added to the final instalment. If you elect to send the invoice to the member now, the email will include a link to pay the first instalment.' There are two dropdown menus: 'Number of instalments' (set to 4) and 'To be paid' (set to 'Fortnightly', which is highlighted with a blue arrow). A large green arrow labeled '7c' points to a 'Generate invoice' button.