Payment Groups

Introduction

Payment groups can be described simply as a type of group within **Church**Insight where membership requires a separate registration and has an associated cost. The applications for this type of group are numerous - from setting up one-off or regular donation schemes, and conference bookings, to 'premium content' areas and 'product of the month' clubs. This guide explains how to set up a payment group, configure it for some of the most common applications, and manage registrations.

Requirements

Before you can begin using payment groups you will need to be able to process repeat credit card payments using one of the following two payment processors:

Verisign (U.S. Customers Only)
Payment processing using the **Payflow Pro** service. See www.verisign.com for further information.

Protx (U.K. Customers Only)
Payment processing using the VSP Direct service. See www.protx.com for further information.

For further information on payment processing see the quick start guide **e-commerce implementation**.

Creating a Payment Group

➲ If you haven't logged into the web site already, do so now. Click the **Login** link on the homepage and enter your login name and password. Click the **web office** link to enter the web office administration area.

➲ Select a 📁 **group folder** beneath which you would like to add a payment group. The main work area will be updated with the **Summary** view for this group.

➲ Click the **Advanced Options** link at the bottom of this area.

> **Advanced options not available?** You will need the **group structure** and **payment group manager** permissions in order to create payment groups. Contact your local web site administrator for the necessary permissions.

➲ Click the **Create a sub-group below** *groupname* task.

➲ Enter a name for your new payment group (e.g. "Autumn Conference" or "Donate Now"), then select the *Payment Group* option from the **group type** selector. If the *Payment Group* option isn't available you need the **Payment Group Manager** Permission granted.

➲ Click the **Create Group** button; you will be re-directed to the **create payment group** wizard.

➲ Select the payment processor which will used to process credit card payments when people register for this group.

➲ Select one of the payment group presets from the list. These presets are used to change some of the terminology used when people register (for example the registration button will be labelled "donate" for a donations group, but "register" for a conference group). You can change your payment group type at a later date if you wish.

Examples of how to set up some of the most common types of payment groups are given below:

Creating a Payment Group for a Conference or Event

Registering for a conference or event usually involves payment of a deposit, followed by a single payment of the balance at a later date; these defaults are reflected in the **Conference/Event Bookings** option.

➲ Click the **Create** button in the appropriate section.

> Please enter the standard cost of your conference/event. You can add booking options that may affect the price later.
>
> Deposit: $ [   ]
> Balance: $ [100.00]
>
> Create >

➲ Enter a *deposit* value if appropriate (if your conference or event is charged in a single payment leave this box empty), then enter the *balance* in the field below. Click the **Create** button to complete the process.

➲ The new payment group will be added to your group structure shortly afterwards.

➲ Begin configuring your new payment group by selecting the **Settings** tab. The **Settings** tab is further sub-divided into a number of tabs; you should work through each of these tabs in order to complete the configuration process:

Welcome   ○ **Step 1 – Welcome**

The welcome area allows you to configure basic settings for the group and compose a welcome article to be displayed when the group is selected from the menu.

- **Group Settings** – the group name and payment group type were set when the payment group was created. You can change these settings if required.

- **Visibility** – Set the dates when registration for the conference will open and close. Then select whether registration is open to site members only, or to both site members and the public.

  The **allow repeat registrations** flag is unchecked by default when the conference/event type has been selected. This prevents site members from registering for the same conference more than once.

- **Welcome** – use the document editor to create an introduction to the conference. You may wish to include links to other documents in this area (such as accommodation details and speaker biographies). A button labelled "**Register**" will automatically be added to the bottom of this document.

  Note: your payment group will not be visible on the web site until the welcome article contains some text.

  Once you have finished entering information in this area click the **save** button before continuing.

Registrations ○ **Step 2 – Registrations**

The **registrations** area allows you to set whether the person making the booking can register more than one person and which items of information should be collected.

- **Custom Page Heading –** check this option to compose a brief introduction to explain the registration process if required.

- **Registrations to this group** – select whether registrations can be made on behalf of others (the default setting is *on* for conference/event type payment groups).

  Use the checkboxes to indicate which items of information should be collected for both the booker and any other delegates, and whether this information should be mandatory.

  In some cases you may wish to provide a login account for people registering for the conference, login access can be granted by selecting the option '*Upon completion, create web site login for this person*'. **Payment groups** are **independent** – this means that the login account provided will allow the user to access secure content in the current group but they will **not** be allowed access to content which is restricted to members of the root group. All delegates will be checked automatically to ensure that they do not already have a login account on the web site.

Once you have finished entering information in this area click the **save** button before continuing.

Payment Schemes ○ **Step 3 – Payment Schemes**

The **payment schemes** area allows you to define when payments for your conference are taken – in most cases this will be an initial deposit followed by the remaining balance. You can display details of each payment element by clicking on the blue band:
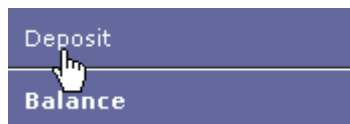
Deposit

Balance

Each payment scheme contains the following settings:

- **Schedule name** – use this field to edit the name of this scheme if required.

- **Funds go to** – select which payment processor will be used to process payments for this scheme.

- **Take payment** – select when this payment should be processed – this could be as soon as the registration has been approved (see the chapter called **processing registrations** below), a fixed number of days after approval, or on a specific date.

- **Each payment gives membership for** – registration for this conference will make each delegate a member of the payment group. You may also wish to grant membership to another content group for a period of time to allow access to companion resources for your conference.

  By default payment of the deposit will make each delegate a member for 1 month only. Once they have paid the remaining balance they will become a member of the group for an unlimited period.

More information about the recurring payment options are given in the chapter called **creating a payment group for ongoing subscriptions**.

Further payment schemes can be added by clicking the **add another payment scheme** button.

Once you have finished entering information in this area click the **save** button before continuing.

○ **Step 4 – Options**

The **options** area allows you to present delegates registering for your conference with a range of questions. You may use this to offer different types of accommodation, to give reduced entry fees for students, or to allow people to select food options for the conference. The selections chosen by each delegate can be used to adjust the overall cost.

By default, only one option is added – the cost of the conference (entered when the group was created). You can change this option to offer reduced ticket prices for students as follows:

- The description field is the *question you are asking* the delegate. Edit this text to read "Please select ticket type".

- Edit the **choice 1** field to read "Standard delegate pass". Set this choice to **selected by default**.

- Click the **Add Choice** button.

- Enter "Student delegate pass" in the **choice 2** field.

- Check the **Affects price** box for this choice.

- Enter an amount for both the deposit and balance payments.

- Change the **A user must select between...** setting so that only one option can be selected:

A user must select between 1 and 1 choices.

> **Note:** when a booker is registering on behalf of a number of people these options are initially applied to all delegates; options can then be personalised for each delegate in a separate step of the process.

- Click the **Save** button to commit these changes. The registration process will now display the following at the **select options** stage:

Conference
Please select ticket type

- ⦿ Standard delegate pass   £20 Deposit, £75 Balance
- ○ Student delegate pass   £10 Deposit, £40 Balance

The following example shows a more advanced use of options to provide choices on different types of accommodation:

- Click the **Add Option** button.

- Enter "Accommodation" in the option name, in the **description** field enter "Please select from our range of accommodation".

- Change the **A user must select between..** setting so that only one option can be selected.

- Click the **Add Choice** button.

- Edit the **Choice 1** field to read "Self-catering" and check the **affects price** box.

- Enter the additional cost required for self-catering accommodation in the **deposit** and **balance** fields.

- Click the **Add Choice** button.

- Enter "Half-board" in the **choice 2** field.

- For this type of accommodation there are three types of apartment – silver, gold and platinum. This can be represented as a sub-option to this choice as follows:

  - Click the [icon] button to add a sub-option.

  - Enter **type** for the sub-option name, then change the **A user must select between..** setting so that only one option can be selected.

  - In the **description** field enter "Please select an apartment type".

  - Click the **Add Choice** button, and enter **Silver** in the space provided.

  - Check the **affects price** option and enter the additional cost required for this type of accommodation.

  - Repeat this process for the gold and platinum apartments.

  - Set the apartment type you wish to be the default to **selected by default**.

> **Note:** you can add a more detailed description of each apartment type by clicking the [icon] button.

- Finally, select which accommodation type will be the default by setting it to **selected by default**.

- Click the **Save** button to commit these changes. The registration process will now display the following at the **select options** stage:

> **Note**: the values entered in the **affects price** fields can also be negative to provide a discount when some options are selected.

`Discounts` o   **Step 5 – Discounts**

The **discounts** area allows you to provide discounts on registration for people matching certain criteria. For example, you can set up a price reduction for registered members of your web site as follows:

- Click the **Add Discount** button.

- Change the name of this discount to "Registered Members". Add a description if required.

- Select whether the discount should be a fixed amount or a fixed percentage and enter the value of the reduction.

- Click on the **choose group** link next to **person is a member of**.

- In the group selection window click on the root group and select **OK**.

> **Note**: the options checked in your **criteria** selection must **all** be fulfilled in order to qualify for the discount. Add further discounts using the **Add discount** button if you would like to offer the same discount for other criteria.

Once you have finished entering information in this area click the **save** button before continuing.

`Payment Details` o   **Step 6 – Payment Details**

This area allows you to configure what types of payment you would like to allow for this conference. By default conference payment groups are set to accept online payments but not offline payments.

There may be situations where a delegate is not required to pay anything to attend your conference. In these situations use the **treat as offline payment** to bypass the credit card payment screen.

At the payment stage of the registration process, users with a login account will be prompted to select either a credit card already recorded in **my wallet**, or enter a new credit card number. Users without a login account will be prompted to enter credit card details.

Once you have finished entering information in this area click the **save** button before continuing.

`Confirmation` o   **Step 7 – Confirmation**

The confirmation screen provides a complete breakdown of costs for the conference and requires the booker to confirm their choices.

⊟ Option Details

	Deposit	Balance
⊟ 👤 **Fred Bloggs**		
Conference		
- Standard delegate pass	£20.00	£75.00
Accommodation		
- Half-Board		
Type		
- Silver		£200.00
Discount: Church Member	-£2.00	-£27.50
Delegate Total	**£18.00**	**£247.50**
Grand Total:	**£18.00**	**£247.50**

Press Confirm to authorise the above charges and complete your registration.

[< Back]   [Confirm]

By default each registration requires confirmation from an administrator. For more information on the confirmation process see the chapter called **Approving Registrations**.

This area also allows you to specify an article to act as a **Terms and Conditions** document. You should use this article to specify refund conditions and your policy for any changes to the registration.

Once you have finished entering information in this area click the **save** button before continuing.

Completion o **Step 8 – Completion**

The final screen in the registration process confirms that registration is complete. You should use this page to thank the booker for their business and explain any further arrangements (such as ticket despatch).

A confirmation email will also be sent to each person registering for this conference as soon as the registration has been approved. Enter the text you wish to be sent in this email in the space provided.

Once you have finished entering information in this area click the **save** button before continuing.

↻   Your payment group is now ready for use.

Creating a Payment Group for online Donations

The 'donations' area of your web site could allow people to support your organisation by presenting a variety of commitment levels from single "one-off" donations, to regular weekly, monthly or annual giving. The **create payment group** wizard allows you to set a minimum donation, and a suggested donation value by selecting the **donations** option.

➲ Click the **Create** button in the appropriate section.

Please enter the suggested and minimum donation amounts:

Suggested donation £ [   ]

Minimum donation: £ [0.00   ]

[Create >]

➲ Enter a suggested donation value if appropriate, then enter a minimum donation value if required in the field below. Click the **Create** button to complete the process.

➲ The new payment group will be added to your group structure shortly afterwards.

➲ Begin configuring your new payment group by working through each area within the **settings** tab as follows:

Welcome ○ **Step 1 – Welcome**

The welcome article allows you to configure basic settings for the group and compose a welcome message to be displayed when the group is selected from the menu.

- **Group Settings** – the group name and payment group type were set when the payment group was created. You can change these settings if required.

- **Visibility** – set dates when you will be accepting donations. In most cases the second field should be left empty to allow donations at any time in the future.

    The **allow repeat registrations** flag is checked by default when the donations type payment group is selected. This allows site members to donate more than once.

- **Welcome** – use the document editor to create an article introducing the donation process. A button labelled "**donate**" will automatically be added to the bottom of this document.

    Note: your payment group will not be visible on the web site until the welcome article contains some text.

Once you have finished entering information in this area click the **save** button before continuing.

Registrations ○ **Step 2 – Registrations**

The **registrations** area allows you to set whether the person making a donation can donate of behalf of other people and which items of information should be collected.

- **Custom Page Heading –** check this option to add further instructions at the top of the page.

- **Registrations to this group -** select whether donations can be made on behalf others (the default setting is off for donation type payment groups).

  Use the checkboxes to indicate which items of information should be collected from the donor (or the person this donation is being made on behalf of), and whether this information should be mandatory.

  In some cases you may wish to provide a login account for your donors. **Payment groups** are **independent** – this means that the login account provided will allow the user to access secure content in the current group but they will not be allowed access to content which is restricted to members of the root group. Each name is checked to ensure that they do not already have an account on the web site.

Once you have finished entering information in this area click the **save** button before continuing.

> Payment Schemes ○ **Step 3 – Payment Schemes**

The **payment schemes** area allows you to define when payments are taken; these schemes may be used to allow donors to give in a "one-off" payment or in a regular series of donations. By default just one payment scheme is created, allowing for a single "one-off" donation. To create regular donation schemes:

- Click the **Add another payment scheme** button.

- Edit the **schedule name** field to read "monthly".

- Set the **take payment** option to **on approval**. This will ensure that payment is deducted immediately on completion of the donation process.

- Set the **each payment gives membership for** option to "1 month". Each payment will therefore make the donor a member of the payment group for 1 month only.

- Check the **Recurring payments every 1 Month(s)**

- New options for recurring payments will be displayed beneath, select the **continue indefinitely** setting.

This process may be repeated for other payment schedules (an annual donation option for example).

Once you have finished entering information in this area click the **save** button before continuing.

> Options ○ **Step 4 - Options**

The options area allows you to present the donor with a range of questions through which the donation value can be adjusted. In the case of donation payment group you may wish to use this area to allow the donor to select how often they would like to give to your organisation.

By default only one option is added – "*Please enter the amount you wish to donate*". The options page can be configured to offer regular donation options as follows:

- Edit the **Option** field to read "frequency".

- Change the **A user must select between..** setting so that only one option can be selected:

  A user must select between 1 and 1 choices.

- The description field is the *question you are asking* the donor. Edit this text to read "Please choose the frequency of your donation".

- Edit the **choice 1** field to read "one off". Set this option to **unselected by default** and **affects price** box.

- Once the donor has selected this option you will then need to ask them how much they wish to donate. This can be achieved using a sub-option as follows:

  o Click the [icon] button to add a sub-option.

  o Enter the sub-option name "donation" in the space provided.

  o In the description field enter the question "Please specify the amount you wish to give."

  o Click the **Add Choice** button, and enter "Amount" in the space provided.

  o Set this option to **Mandatory** and check the **Affects Price** option.

  o Set the **cost of payment scheme *one off*** to the **variable** type, then enter a suggested and minimum donation value.

- Click the lower **Add Choice** button to create a monthly donation option.

- Enter the name **Monthly** as the second choice. Set this option to **selected by default**.

- Repeat the process described above to add a donation value sub-option to this item. This time set the **cost of payment scheme *monthly*** to the variable type.

The options page should now be configured as illustrated below:

Once you have finished entering information in this area click the **save** button before continuing.

Discounts o **Step 5 – Discounts**

The discounts area is not usually used for online donations.

Payment Details o **Step 6 – Payment Details**

The **payment details** area allows you to configure what types of payment method you would like to receive. In most cases the following settings are the only ones required for online donations:

- **Accept online payments** is enabled, but **accept offline payments** is disabled.

- The total price should never be zero for an online donation (provided that a minimum donation has been entered for each of the *amount* sub-options above. This setting should therefore not be applicable.

Once you have finished entering information in this area click the **save** button before continuing.

Confirmation o **Step 7 – Confirmation**

The confirmation screen presents the donor with a summary of their commitment before confirming their choices. The options in this area are as follows:

- **Registrations require approval** - when this option is checked an administrator will need to approve the donation before the credit card payment is processed. For donation type payment groups this option is unchecked by default.

- **Allow changes to registration after completion** – this option should be left **unchecked**. In the case where donors are giving a regular amount they will still be able to cancel their existing donation schedule and commit to a new one.

Once you have finished entering information in this area click the **save** button before continuing.

Completion o **Step 8 – Completion**

The final screen in the process confirms that the donation process is complete. You should use this page to thank the donor for their contribution.

A confirmation email will also be sent to the donor. Enter the text you wish to be sent in this email in the space provided.

Once you have finished entering information in this area click the **save** button before continuing.

↻ Your new payment group is now ready for use.

Creating a Payment Group for Ongoing Subscriptions

Subscription type payment groups can be used to charge users on a regular basis for access to restricted content on the web site.   You may also wish to use this feature to reward your regular giving partners with access to "premium partner" material on your web site. The **create payment group** wizard allows you to set a subscription cost and the payment frequency.

↻   Click the **Create** button in the appropriate section.

> Please describe the payment frequency and amount. You can add more details later.
>
> Amount: £ 10.00
>
> Frequency: Monthly ▼
>
> Create >

↻   Enter the subscription *cost* and the *frequency* of payment from the range of options.

↻   The new payment group will be added to your group structure shortly afterwards.

↻   Begin configuring your new payment group by working through each area within the **settings** tab as follows:

Welcome   ○   **Step 1 – Welcome**

The welcome article allows you to configure basic settings for the group and compose a welcome message to be displayed when the group is selected from the menu.

- **Group Settings** – the group name and payment group type were set when the payment group was created. You can change these settings if required.

- **Visibility** – set dates when subscriptions will open. In most cases the second field should be left empty to indicate that subscriptions will be available indefinitely.

  The **allow repeat registrations** flag is unchecked by default when the subscriptions type payment group is selected. This prevents users subscribing more than once.

- **Welcome** – use the document editor to create an article introducing the subscription process. A button labelled "**subscribe**" will automatically be added to the bottom of this document.

  Note: your payment group will not be visible on the web site until the welcome article contains some text.

Once you have finished entering information in this area click the **save** button before continuing.

Registrations   ○   **Step 2 – Registrations**

The registrations screen allows you to set whether the user can subscribe on behalf of other people and which items of information should be collected.

- **Custom Page Heading –** check this option to add further instructions at the top of this page.

- **Registrations to this group -** select whether subscriptions can be made on behalf others (the default setting is *off* for subscription type payment groups).

  Use the checkboxes to indicate which items of information should be collected for the subscribers, and whether this information should be mandatory.

  If the "product" that people are subscribing to is provided online (through membership of a group as described below) you should ensure that all subscribers are given a web site login.

Once you have finished entering information in this area click the **save** button before continuing.

 o **Step 3 – Payment Schemes**

The **payment schemes** area allows you to define when payments are taken. In most cases a subscription type payment group will have a single "fee" charged on a monthly, weekly or yearly basis. You may however wish to offer different schemes to allow people to select how frequently they pay. Use the method described in the *donations* configuration process above for more information on adding additional payment schemes.

Each payment scheme contains the following settings:

- **Schedule name** – use this field to edit the name of this scheme if required.

- **Funds go to** - select which payment processor will be used to process payments for this scheme.

- **Take payment** – select when this payment should be processed. If the "premium" content you are providing access to is renewed on a specific date you may also wish to charge your subscribers on this date. By default subscription type payment groups will process the first payment as soon as registration is complete.

- **Each payment gives membership for** – each time the user pays the subscription fee they will be made a member of this payment group for a period of time. The **options** area (see step 4) may also be configured to make the subscribers a member of another group in your web site (for example the group where your premium content is located).

  By default the frequency you selected in the payment group creation wizard will be used to set the membership duration.

  The **Recurring payments** option is also checked by default, charging each subscriber for an indefinite duration.

Once you have finished entering information in this area click the **save** button before continuing.

 o **Step 4 – Options**

The options area allows you to present the user with a sequence of questions, the answers to which can be used to adjust the total price.

By default just one option is created, showing the fee charged for the subscription. This default configuration will result in the options page being skipped when a user subscribes since there are no choices to be made. If required you can add further

choices; the following example shows how to make each subscriber a member of your premium content folder:

- Click the ⊞ button next to the **Fee** option to display further information on this item.

- Click the [icon] button next to the first choice.

- Select the group you would like to add subscribers to. Only groups where you have **group manager** permissions will be available for selection.

> **Important note:** any subscriber added to a normal 📁 group type folder will automatically become a member of all the parents groups. This will therefore give them login access to all content areas available to "members only". If you do **not** wish to provide your subscribers with "members only" access you should ensure that the "premium" content group is an **independent group**.

Once you have finished entering information in this area click the **save** button before continuing.

Discounts o **Step 5 - Discounts**

The **discounts** area allows you to provide discounts on subscription for people matching certain criteria. For more information on adding discounts see the in the chapter above called **creating a payment group for a conference or event**.

Payment Details o **Step 6 – Payment Details**

This area allows you to configure what types of payment you would like to accept for subscription. By default, subscription type payment groups accept online payments but not offline payments.

There may be situations where the discounts you are offering mean that the total cost of subscription is zero. In these situations use the settings to choose whether credit card details are still required.

Confirmation o **Step 7 – Confirmation**

The penultimate stage of the subscription process provides a cost breakdown for the options chosen by the subscriber.

The **registrations require approval** option means that each new subscriber must be approved by an administrator before subscription commences (in most cases this option should be left unchecked for subscription groups).

The **allow changes to registration** option allows users to revisit their purchase and amend options they have selected. In most cases this option should also be left unchecked for subscription groups (any subscription can be cancelled by going to the **my payments** area).

Completion o **Step 8 – Completion**

The final screen in the process confirms that subscription is complete. You should use this page to explain any further steps (such as how to access the premium content).

A confirmation email will also be sent to the subscriber. Enter the text you wish to be sent in this email in the space provided.

Once you have finished entering information in this area click the **save** button before continuing.

↺ Your new payment group is now ready for use.

Approving Registrations

In the **confirmation** area of your payment group settings you can choose whether registrations require administrator approval or not. This is particularly useful for conferences if for any reason you would prefer to reject an application, or if you would like to ensure that you have a minimum number of registrations before accepting payments.

Donation groups, and subscription groups do not normally require administrator approval so this checkbox is unset by default.

If your payment group has new applications awaiting approval it will be highlighted as shown below:

These registrations can be processed as follows:

↺   Click on the payment group where you have applications outstanding.

↺   Click on the **Registrations** tab (this will be labelled donations, or subscriptions if you require approvals for other types of payment group).

↺   The first list in this area displays new applications awaiting approval, the second displays already approved registrations.

Applicant	▲ Signup Date	Status	No. Delegates	Method	Amount
Andrew Parker	18/01/2006	Awaiting Approval	1	💳	£265.50

↺   Click on the applicant name to display the registration details.

↺   The **Summary** tab shows the list of delegates attending and the options they selected.

↺   Click on the [icon] **Approve this registration** link, then click the **Approve** button to confirm your selection.

↺   The registration will be approved and any payment due on approval will be debited from the credit card. You can view the state of all transactions by clicking the **transactions** tab. For more information on this area see the chapter below called **Processing Payments**.

Processing Payments

In most cases payment for a registration is taken as soon as the application is approved. For donations and subscriptions approval is often automatic (so the payment is immediate), for conferences payment is usually taken when the administrator has approved the application, although this may be the deposit with final payment set to be taken in the future.

There may be some occasions when payments require manual processing by an administrator. This may be because payment was by cheque/cash, a registration has been amended or because the payment has failed. You can process these payments as follows:

Offline Payments

The **payment details** area of your payment group settings allows you to indicate if you are prepared to accept offline payments (such as cash or cheque) for the payment group. An administrator can indicate when an offline payment has been received as follows:

➲ Approve the registration in the normal way as described in the **Approving Registrations** chapter above. Display the **Payments** tab for this payment group.

➲ The offline payment will be displayed in the list as **not received**; the **method** column will show the icon.

> **Note:** you can quickly locate transactions in the **payments** tab using either the **Change Filter** button, or by sorting the list using the column headings.

➲ Click the Not received link.

➲ This will open the **Invoice** window, which contains tasks to **Add a new receipt** and **Amend invoice amount**.

> **Note:**.the Payment group permissions to **Add Receipts** and **Change Receivables** are required to see these options.

➲ Select the **Add a new receipt** option; enter a payment method (cash or check) and any remarks e.g. check number.

➲ Click '**Add**' to confirm your actions. The **Payments** tab will be updated shortly afterwards.

Amending a Registration

The **Confirmation** tab of your payment group settings has an option labelled **allow changes to registration after completion**. Selecting this option allows the user to amend any choices they have made via the **My Payments** area, and subsequently this may result in an adjustment to the overall cost. Similarly a user may select the **cancel registration** option which may require a refund.

Administrators can also modify a Registration through the Web Office by selecting the **Edit this Registration** task from the registration details.

Any changes to a registration will appear in the **Registrations** tab of your payment group as an application.

➲ Click the name of the applicant in the list.

➲ The application will indicate that this is an amended registration requiring approval. Click **Approve this registration** to confirm the changes. The **History** of the registration will be displayed showing the previous registrations and the current one. Payments can then be manually processed in the following ways:

   o **Amending the Invoice amount** – This option can be used to change the amount of the invoice, which can be used to cancel an outstanding balance from a previous registration that has now been superseded.

      To amend an invoice click the icon next to the appropriate receivable under the *Invoice* column and the invoice window should open. Next select the **Amend an invoice amount** task, adding the appropriate amount and any 'reason' to explain why the amendment was made.

   o **Issuing a Refund** – You may need to issue a refund when a user has cancelled a service part way through the period they paid for. For example if a user has subscribed to a webstream service on a monthly basis and they cancel their subscription part way through the month then your policy may be to issue a refund for the period that was remaining.

      To issue a refund click the icon next to the appropriate receivable under the *Invoice* column, to open the invoice window. Next select the **Refund a Receipt** task, selecting the appropriate receipt and add the appropriate amount and the reason for future reference.

      You should then 'Amend the invoice amount' as above if the previous balance has now been superseded.

   o **Assigning a Receipt to a different Invoice** – If a previous receipt has been received there will be an option to assign that receipt to a different invoice. This would be appropriate if receipts from a previous registration were less that the outstanding balance on the current amended registration - using this option would mean no refunds would therefore need to be issued for previous receipts as they could be deducted from the outstanding balance of the current registration.

      An example where this would occur is if a user amends a registration that had previously had a deposit taken but the full balance was due to be taken at a later date. If the receipt from the previous registration was assigned to the current invoice and the outstanding balance from the previous registration was amended to be zero (see above), it would mean only the remaining balance of the amended registration would be taken at the appropriate time and no refunds would need to be issued.

To assign a receipt to a different invoice click the 🖹 icon, next to the appropriate receivable under the *Receipts* column, to open the *Reassign Receipt* window. Next select the appropriate invoice to assign the receipt to and add the appropriate amount and confirm your action by clicking OK.

Failed payments

The **Payments** tab of your payment group provides a complete list of transactions which have taken place so far. If a payment hasn't completed for any reason the **status** column will indicate this by stating Not Received. Payments by cash/check are also displayed like this.

You can process these transactions as follows:

➲   Click the Not Received status to display more details of the transaction. The reason a card transaction failed is also displayed here.

➲   Choose to **Add a new Receipt** and select the **amount** and the **payment method** you wish to use for the transaction and any remarks you wish to make about the transaction.

> **Note:** you should ensure that you have the permission of the card holder before making any changes to the registration, or processing transactions on another credit card.

➲   The results of any re-issued transactions will be displayed in the payments tab shortly afterwards.

While you are waiting for a successful payment you may wish to suspend this person's registration. You can do this as follows:

➲   In the list of payments, click on the name of the person where payment has failed.

➲   Click the 🖹 **suspend this registration** task; click the **suspend** button to confirm your choice.

Membership of this group will be suspended, and no further payments will be processed. Once you have successfully received payment you can reactivate this registration using the appropriate link on the registration details window.

Payment Group Members

The **payment schemes** area of your payment group settings includes an option to make each registered person a member of this payment group for a period of time (this may be as little as 1 month, but may be indefinite). You can see who is currently a member of the group by clicking the **Delegates**, **Donors**, or **Subscribers** tab (depending on your payment group type).

The period of time you choose to make each person a member will depend on the type of payment group you are creating:

➲   If you are running a conference then each person who pays the full balance will usually remain in this payment group indefinitely.

➲   If you are accepting "one-off" donations then each person who donates may be retained in the group for up to 12 months, after which they are regarded as inactive donors.

If you are using the payment groups to provide access to a premium content area membership of the group is only active whilst payments continue.

The options you have created in the **options** area are illustrated as sub-groups of the main payment group. For example in the conference group example above, the options for different tickets and accommodation types are illustrated as follows:

You can therefore see how many people have elected to stay in self-catering accommodation by going to the **delegates** tab of the *accommodation: self catering* group.

Payments Groups in the User Record

The payment groups a person belongs to can be displayed as follows:

1.   Display the user record you are looking for, either by browsing through the **members** tab or by using the **quick find** tool.

2.   Click on the **registrations** tab.

3.   The payment groups where the user is currently a member will be displayed as follows:

Payment Group	Status	Role	Approval Date	
Premium Content	Approved	Booker and delegate	24/01/2006	

Bulk Order Generation for Payment Groups

There may be occasions where your payment group involves the regular purchase of a product from your online shop – for example in a "CD of the month" or "Book of the month" club.

A group of this type can be set up as follows:

➲ Create a new **subscription** type payment group using the method described above. Set the payment amount to zero.

➲ In the **settings** tab for your new payment group ensure that the following options are selected:

    o In the **registrations** area ensure that the **delivery address** option is checked for all subscribers.

    o In the **payment schemes** area set the **each payment gives membership for** to the **unlimited period** option. The **funds go to** option must be set to the same payment processor used by your shop.

    o In the **options** area change the *fee* option so that the description reads "Subscribing to this service is free however you will pay for each CD you receive." Uncheck the **disabled** option. Set the **a user must select between** setting to contain "1" in both fields.

    o In the **payment details** area ensure that the **accept online payments** setting is checked and **accept offline payments** is unchecked. The **if total price is zero** option should be set to **treat as online payment**.

    o The **discounts** area is not applicable for this type of payment group. If you wish to provide free products to members of a certain group you will need to set up a special offer on the *product* you are supplying.

The settings above allow people to subscribe to this service free of charge; each time they receive a CD they are charged accordingly. The benefit of this approach is that each subscriber can be charged appropriately for shipping costs based on your delivery charges matrix (you should of course explain this in your welcome document).

To place a bulk order in the shop:

➲ Click on the **Shop** tab in the web office.

➲ Locate the product in your catalogue you wish to order in the normal way.

➲ Display the full record for this product by clicking on the product name.

➲ In the **details** tab click the **Create a bulk order on this product for all members of a payment group** task.

> **Note:** you must have the **bulk order creator** permission on at least one payment group for this task to be available.

➲ Click the **Choose** button and select the group you would like to create a bulk order for.

➲ Click the **OK** button to confirm your selection.

➲ Once you have indicated your acceptance of the notice concerning bulk orders click the **place order** button.

➲ A list of recipients will be displayed alongside their payment method and delivery region. Select a delivery method for each delivery region represented using the options beneath.

- ➲ Complete the order by clicking the **Place orders** button. Each credit card will be authorised in turn; at the end of the process you will be notified of any credit cards which failed to authorise. At this stage no money is deducted.

- ➲ Orders created using this process will now be added to the **New** orders list. Click on this link in the left-hand column to display the list of orders.

- ➲ Click the 🖥 button for any order which is part of the bulk order. All orders which are part of the bulk order will be displayed.

- ➲ Use the 👉 **Collect payments for all orders in a certain status** task to batch process all outstanding credit card payments.

- ➲ Use the 👉 **Send a mailing to the recipients of this bulk order** to produce address labels if required.

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