

RecChat – Bulk Installment Billing Date Change

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RecChat – Bulk Installment Billing Date Change

Capabilities

Does the installment billing date change extend the membership expiration date?

No, but you can go to Pass membership Bulk Change to extend expiration dates.

Does this utility also allow us to bulk-change installment billing fees charged and dates?

For example, could I move my 9/1/20 bill date to 9/15/20 and only charge half automatically?

No, you would need to use the Installment Billing Bulk Change utility to change prices. Currently we do not have a method to shift the day of the month on which a bill will be charged without doing so manually in the customer's billing schedule.

Is there any difference between using this and using Pass and Childcare Installment Billing?

No difference. You will just want to change the Installment Billing module to Activity when running the utility.

When you say "passes and memberships," does that included all types?

Yes. Standard passes, family passes, and punch passes.

Is there an option to bulk change from "Unbilled" to "Cancelled?"

We do not wish to extend the billing cycle.

There is another utility called Bulk Installment Billing Change, which allows you to change from "Unbilled" status to "Suspended" status. This is effectively cancels those bills.

General Installment Billing

Is there an option to use Installment Billing to allow monthly payments for a program fee over a certain period?

Yes. You can set the frequency, duration, and amount of the fee with installment billing.

It was my understanding we cannot run billing for a previous date, but it appears you can if billing hasn't been run for those specific accounts/activities?

Correct. If the bill has the word BILLED, you will never be able to charge them again for that bill, but if you have an unbilled bill in the past, you are able to backdate the date and charge for that bill. Even though you are running a billing for a past date, and postings (charges, auto debits, credit cards) will occur on the date in which you run the process.

Can we set up Installment Billing as an option for a program that only we can see in RecTrac?

We do not want WebTrac customers to see the installment billing option but if they call us, we would like the option of choosing it for certain families that qualify.

Yes. The *Web Usage Option* field in Installment Billing Template has a setting for "Never."

What is the harm in leaving schedules with unbilled lines?

There is a slight risk that someone could accidentally run billing for a date in the past and unintentionally charge for the old unbilled records.

If someone has credit to their household account, can you charge the instalment before the due date?

Yes, you can use the Household filters in the Installment Billing Processing screen to limit the run for a single household. You can also go to that person's Purchase History in Global Sales, find the item with the bills attached, then click the Update Fees button group, which should show you a Charge Pending Fees button. Through there, you can select the bills you want to charge, and have the customer pay for them immediately via household credit, or any payment method.

I noticed activity enrollments can be set up as installed billing. Are league module registrations able to set up the same way?

No. Currently the only modules that can use Installment Billing are Activity, Pass, Rental, and Lockers. You could create an activity to enroll the league members into and attach billing to that as a workaround.

When you change a pass date through global sales, is there a way to change the installment bill schedule at the same time?

Yes. This can be controlled automatically via your Installment Billing Template. If you set the Total Number of Bills to 0, RecTrac will automatically create the proper number of bills to fill the active dates of the item being sold (Pass member and expiration, Activity Section begin and end dates, etc.). You can also use the Update Bill from Cart option. You may need to go to Processing Screen Management for Global Sales Area 3 (the default cart area) to turn that option on if you do not see it currently.

Reports

Is there a report that can be created/run which lists membership expiration dates and bill dates for the pass?

We want to see what passes are caught in the odd place of extended expiration date but didn't have the bills moved during that time. More specifically, would you create it and share the export with us?

Yes, you can customize an Installment Billing report to show this information. We have posted the report output template to the RecChat Archive for your convenience.

Can we customize that Installment Journal report ourselves?

I would love to have the customers email addresses included. I could not find it in the report output listing.

No. The IB Journal is the result of a process; it is not a report, therefore, it cannot be customized. You could customize other Installment Billing reports, however.

Do you have a cheat sheet available for changing or creating reports adding new filters?

We do not have a cheat sheet. We have two Virtual Symposiums on Report Input and Output, but if you do not subscribe to virtual symposiums, you can find help under the support section of RecTrac.

Is there a report for installment billing that shows the current balance on each household? So, any credits or balances due could be seen prior to running monthly bills.

Yes, if you run the standard VSI - Pass Membership Report, you can filter it to include only members with Installment Billing linked by selecting those criteria on the Detail Criteria tab.