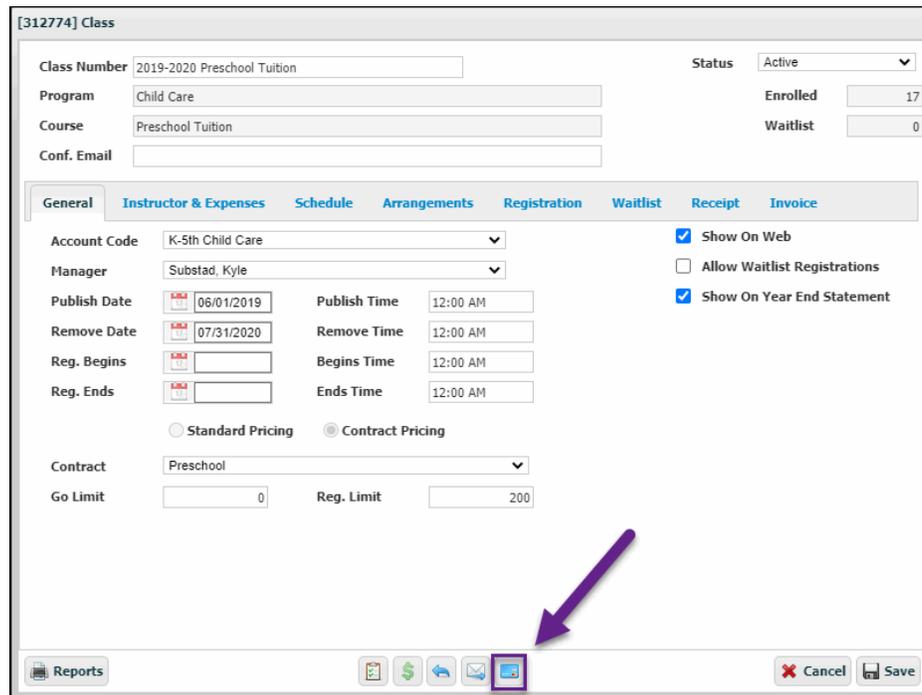




# Batch Charge Credit Cards

Before beginning **Batch Processing**, compile the list of participants who have consented to having their cards automatically charged. If this question was asked during the registration process within the question profile, gather this information by running the **Registration Questions by Question** report. Once the report has been run, review registrants' responses to an automatic-payment-related question. Begin the **batch charging process** once the list of account holders with the necessary permissions is complete.

1. From the **Main Menu**, double-click into the appropriate **Class** to begin the batch charging process.
2. Select the **Charge Card** icon () at the bottom of the **Class** window.



[312774] Class

Class Number: 2019-2020 Preschool Tuition      Status: Active

Program: Child Care      Enrolled: 17

Course: Preschool Tuition      Waitlist: 0

Conf. Email: [Empty]

General | Instructor & Expenses | Schedule | Arrangements | Registration | Waitlist | Receipt | Invoice

Account Code: K-5th Child Care       Show On Web

Manager: Substad, Kyle       Allow Waitlist Registrations

Publish Date: 06/01/2019      Publish Time: 12:00 AM       Show On Year End Statement

Remove Date: 07/31/2020      Remove Time: 12:00 AM

Reg. Begins: [Empty]      Begins Time: 12:00 AM

Reg. Ends: [Empty]      Ends Time: 12:00 AM

Standard Pricing       Contract Pricing

Contract: Preschool

Go Limit: 0      Reg. Limit: 200

Reports | [Icons: Reports, Dollar, Refresh, Mail, Charge Card] | Cancel Save

3. A **Charge Cards** window will open. Designate the appropriate account(s) to whom the charge will be applied by checking the box next to the corresponding name. Once the list of names is selected, click on the **Process** button in the bottom right corner of the window.

Student	CC Type	Last 4	Exp	Amount Due
<input checked="" type="checkbox"/> Cordero, Alredo	Visa	1111	04/24	\$176.00
<input checked="" type="checkbox"/> Cordero, Jeffe	Visa	1111	04/24	\$200.00
<input checked="" type="checkbox"/> Cordero, Mateo	Visa	1111	04/24	\$150.00
<input type="checkbox"/> Lamb, Matthew	Visa	1111	04/24	\$1,020.00

- **NOTE:** If there is no credit card information next to a student's name, that student will not be charged.
4. An additional window will appear asking, "Are you sure you want to charge the accounts for the fees associated with this class?" Once payment information has been reviewed, select **Yes**.

Process Charges

Are you sure you want to charge the accounts for the fees associated with this class?

Yes No

5. **Save** out of the Class and wait at least *fifteen minutes* before running any reports. This ensures adequate time to process all payments and the subsequent accuracy of all reports.

6. To identify which cards did not process during batch processing, run the **Students with Balance and CC Message** report. This report also lists the reason why each card did not process properly. Navigate into the **Class** and select **Reports**.

The screenshot shows a software interface for a class. At the top, it is titled "[312774] Class". Below this, there are several input fields: "Class Number" (2019-2020 Preschool Tuition), "Program" (Child Care), "Course" (Preschool Tuition), and "Conf. Email". To the right, there are dropdown menus for "Status" (Active) and "Enrolled" (17), and a "Waitlist" (0) field. Below these fields is a tabbed interface with tabs for "General", "Instructor & Expenses", "Schedule", "Arrangements", "Registration", "Waitlist", "Receipt", and "Invoice". The "Registration" tab is active. It contains various registration settings: "Account Code" (K-5th Child Care), "Manager" (Substad, Kyle), "Publish Date" (06/01/2019), "Remove Date" (07/31/2020), "Reg. Begins" and "Reg. Ends" (empty), "Publish Time", "Remove Time", "Begins Time", and "Ends Time" (all 12:00 AM). There are also checkboxes for "Show On Web" (checked), "Allow Waitlist Registrations" (unchecked), and "Show On Year End Statement" (checked). Below these are radio buttons for "Standard Pricing" and "Contract Pricing" (selected), a "Contract" dropdown (Preschool), and "Go Limit" (0) and "Reg. Limit" (200) fields. At the bottom left, there is a "Reports" button with a printer icon. At the bottom right, there are "Cancel" and "Save" buttons.

7. In the **Report** window, select **Students With Balance and CC Message**, then click **OK** to generate an Excel spreadsheet detailing student names, balances, and an explanation of results.

The screenshot shows a "Report" window. On the left, there is a list of report options: "Registrations by Class", "Registrations by Contract Segment", "Revenue By Acct. Code (Long)", "Revenue By Acct. Code (Short)", "Revenue By Acct. Code w/o CC (Long)", "Revenue By Acct. Code w/o CC (Short)", "Sign In/Out Report", "Sign In/Out Report With Rates", "Students With Balance and CC Message" (highlighted in blue), "Suspended Contracts", "Tax Statement - All", "Tax Statement Class", "Tax Statement Class - Previous Year", "Tax Statement Previous Year - All", "Tent Cards", "Test", and "Waitlist By Class". On the right, there is a description of the selected report: "Prints a report showing Students with a Balance and the last CC process message." At the bottom right, there are "Cancel" and "OK" buttons.