

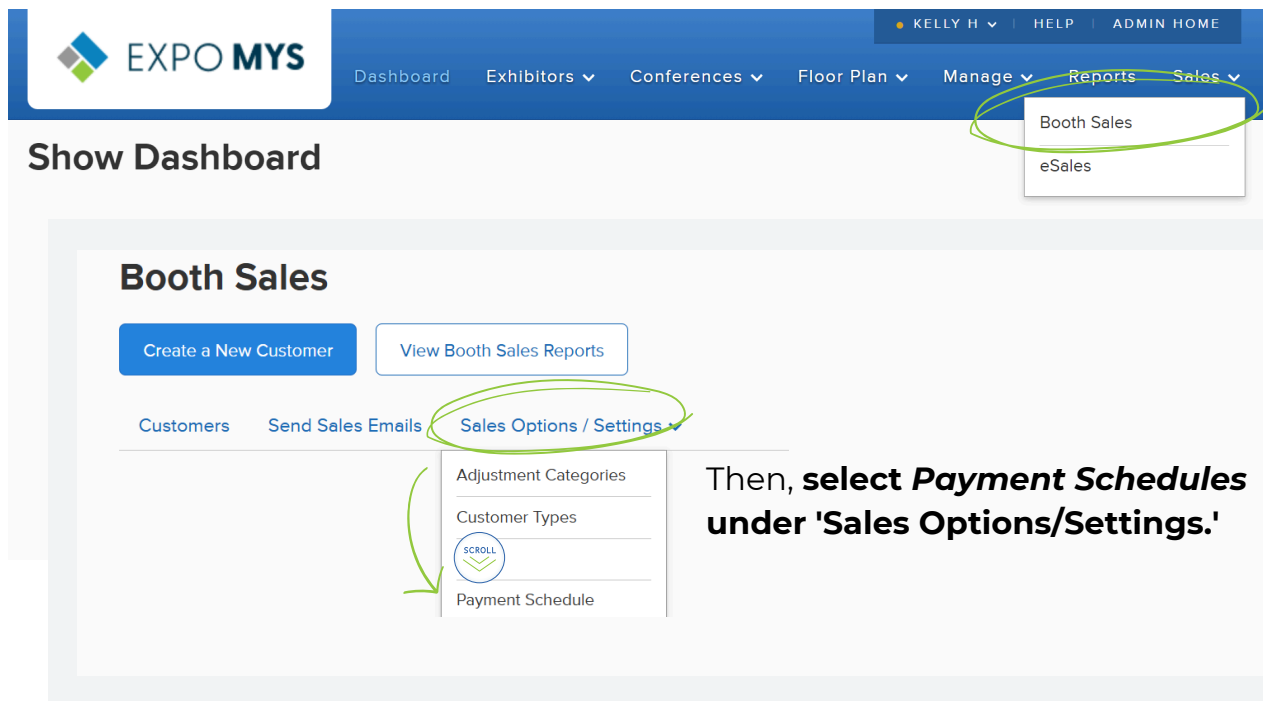
Payment Schedules

Create & Apply Payment Schedules

Payment schedules allow you to collect payments within a timeframe that suits your business needs. MYS will generate a default schedule based on your setup information, but you can customize additional schedules to meet specific customer needs.

Access Payment Schedules

To access payment schedules, **go to the 'Sales' dropdown on the Show Dashboard and select *Booth Sales*.**



The screenshot shows the EXPO MYS Show Dashboard. At the top, the navigation bar includes the EXPO MYS logo, a user profile for Kelly H., and links for HELP and ADMIN HOME. The main navigation menu contains Dashboard, Exhibitors, Conferences, Floor Plan, Manage, Reports, and Sales. The Sales dropdown menu is open, showing Booth Sales and eSales. Below the navigation, the Booth Sales section is visible, featuring buttons for 'Create a New Customer' and 'View Booth Sales Reports'. A dropdown menu for 'Sales Options / Settings' is open, showing a scrollable list with items: Adjustment Categories, Customer Types, and Payment Schedule. A green arrow points from the 'Payment Schedule' item to the right. To the right of the screenshot, text reads: 'Then, **select *Payment Schedules* under 'Sales Options/Settings.'**'

The Payment Schedule Management page shows all existing payment schedules and the products they are applied to.

Create a New Payment Schedule or Edit an Existing One

Note

Editing a payment schedule follows a similar process to creating a new one. After completing the initial step below, refer to pages 3 & 4 for detailed instructions on both creating and editing payment schedules.

1

Click 'Add New Payment Schedule' to create a new schedule,

Payment Schedule Management RETURN TO BOOTH SALES

[Add New Payment Schedule](#)

Showing 6 payment schedules Search:

▲ Payment Schedule Name	◆ Applies To	Actions
Single Payment	Booths/Spaces, Item(s)	

or click an existing schedule name and select 'Edit' to update it.

Payment Schedule Management

[PAYMENT SCHEDULE DETAILS](#) [EDIT](#)

2 Enter the schedule name & select the products to which the payment schedule will apply.

ADD PAYMENT SCHEDULE

Payment Schedule Name: *

Apply To: *

Booths/Spaces Default Schedule (?)

Item(s) (?) Default Schedule (?)

Package(s) (?) Default Schedule (?)

Cancel



Tip

By selecting the 'Default Schedule' box, any product in this category will automatically have this payment schedule. Each product can only have one default schedule.

3 Click 'Add/Update Payment Schedule' to continue and add payment terms.

4 Click 'Add Payment Terms' to add payment details,

PAYMENT SCHEDULE DETAILS EDIT

Schedule Name: 100% Due

Applies to: Booths/Spaces, Item(s) (Default), Package(s) (Default)

Showing 1 payment terms

Title	Description	Amount Due	Due Date	Actions
100%		100.00 %	12/31/20XX	

or click on an existing term title to edit current details.

5**Enter payment terms.**

**When adding your terms, remember that the final payment must be a percentage and add up to but not exceed 100%.*

- Enter a title & description.
- Select a payment type, *percent, fixed amount, or per square unit*, and enter the amount.
- Add a due date

If applicable, enter a net due. The 'Net Due' is the days after invoicing the payment is due. For the payment to be due immediately, enter 0.

**Tip**

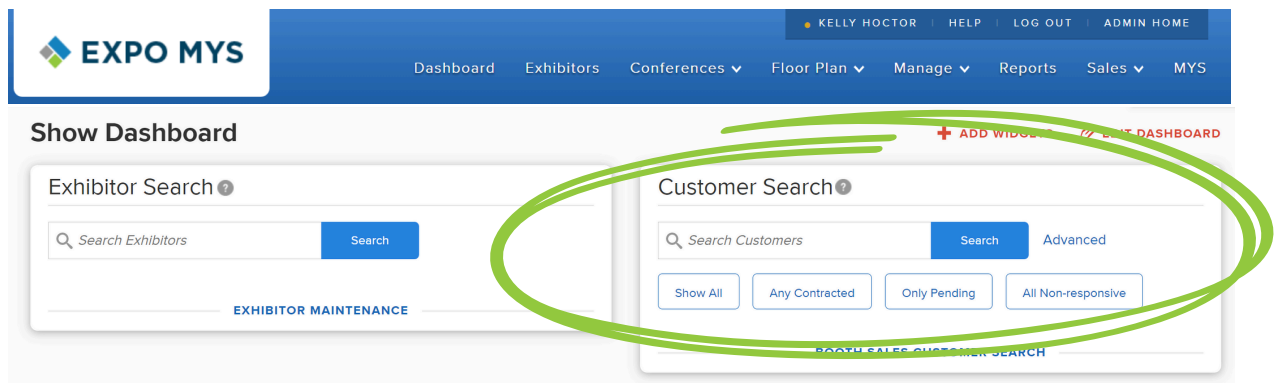
The '**Per Square Unit**' payment type has some limitations: it can only be used for the first payment or deposit in a payment schedule, and only when collecting payment for booths or spaces with a square area greater than 0. It is not available for schedules linked to 'Items.'

6**Click 'Add Payment Term' to save.****7****Repeat steps 4, 5 & 6 as needed until the total payment equals 100%.**

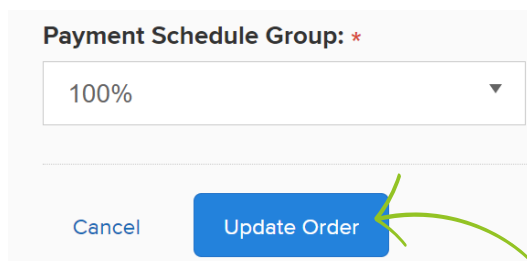
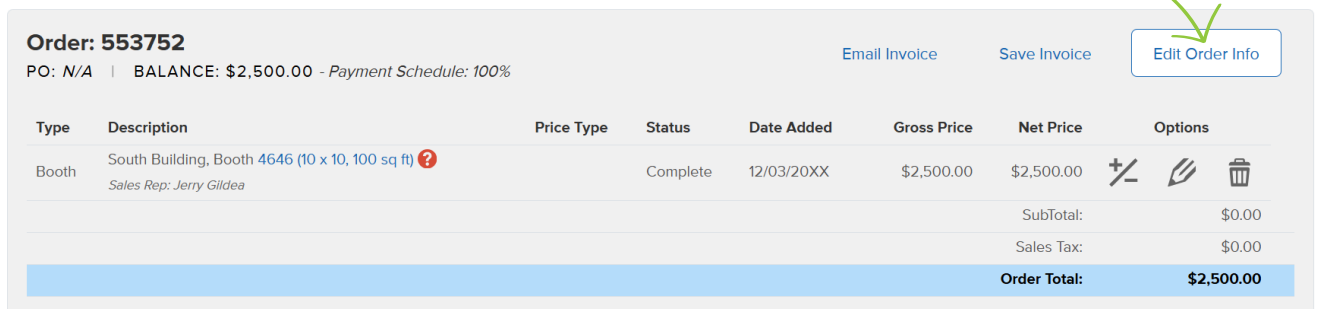
Apply a Payment Schedule

Occasionally, a customized payment schedule is necessary to accommodate specific customer needs. The steps below show how to apply a personalized schedule to a customer. If you still need to create your payment schedule, refer to the previous pages for guidance.

- 1 Use the 'Customer Search' widget on the Show Dashboard to locate the customer.**



- 2 Within their 'Customer Maintenance' section, scroll down to 'Line Item Orders,' locate the specific order to which you want to assign the new payment schedule and click 'Edit Order Info.'**



- 3 Use the dropdown menu under 'Payment Schedule Group' to choose the preferred payment schedule.**

- 4 Click 'Update Order' to apply the new payment schedule.**