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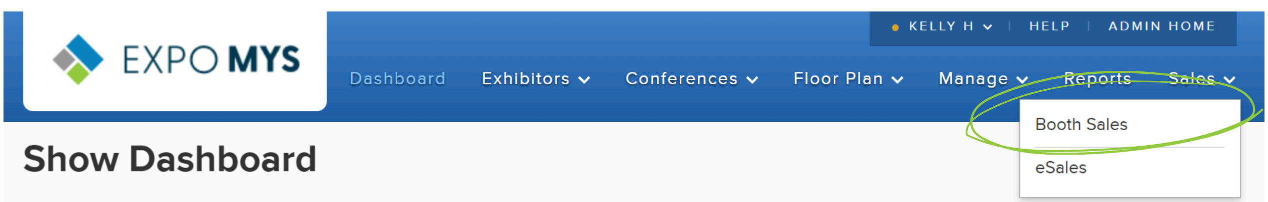
Payment Schedules

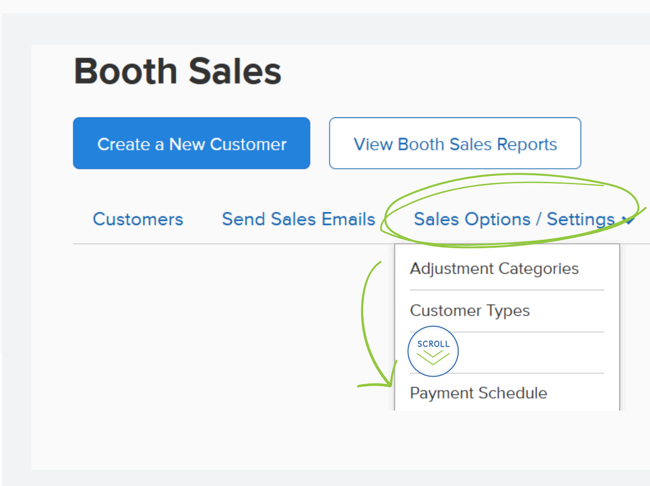
Create & Apply Payment Schedules

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*.**





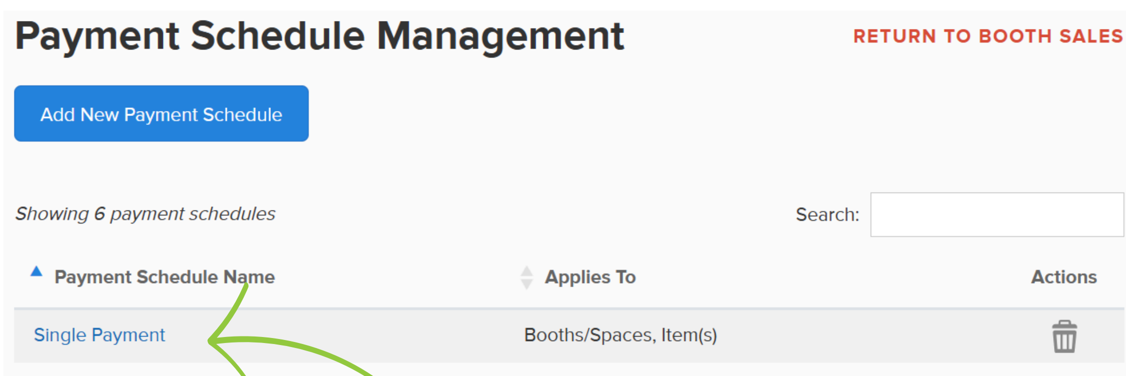
Then, **select *Payment Schedules* under 'Sales Options/Settings.'**

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

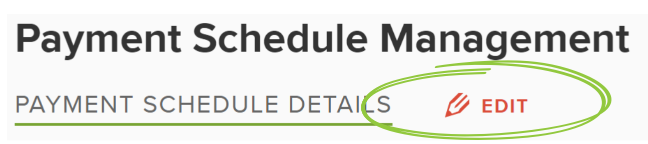
Create a New Payment Schedule or Edit an Existing One

> **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.

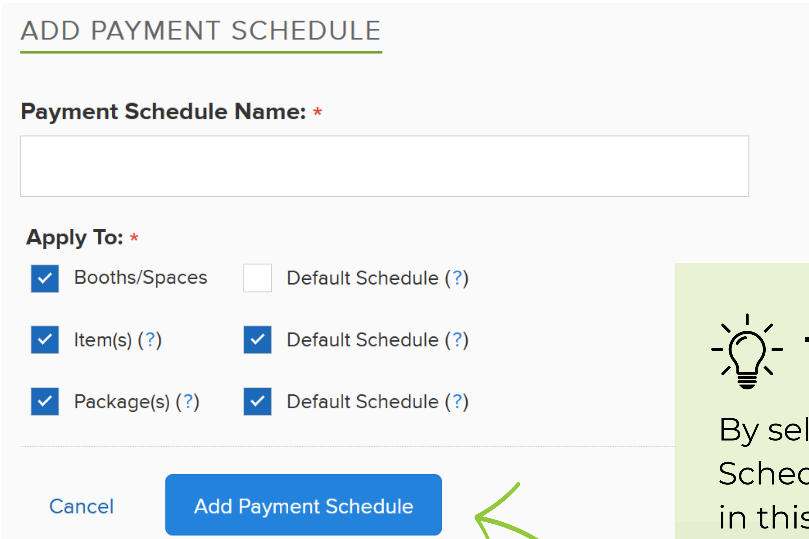
1 **Click 'Add New Payment Schedule' to create a new schedule,**



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



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

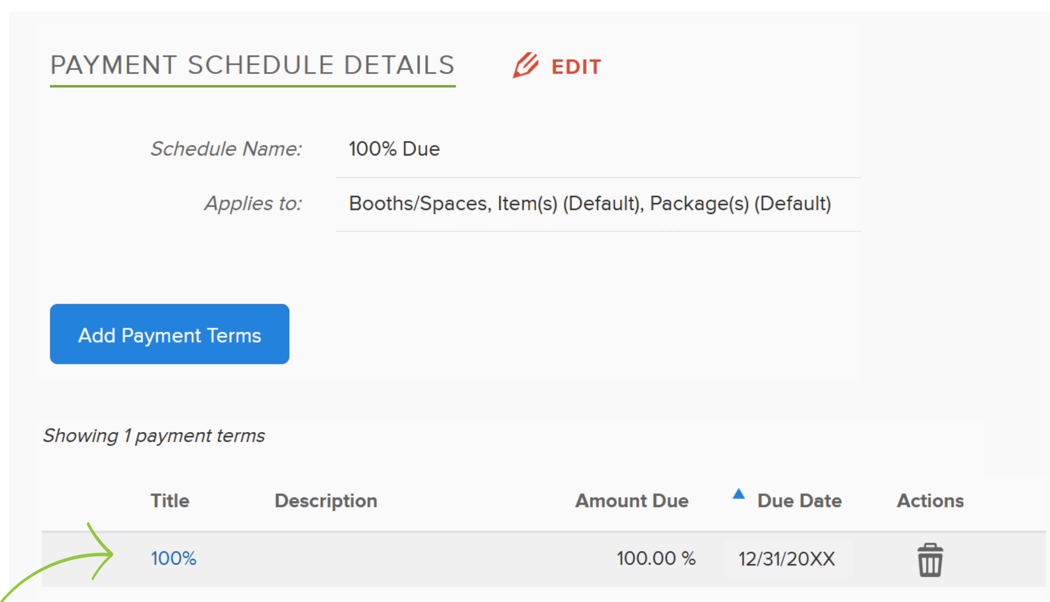


3 **Click 'Add/Update Payment Schedule' to continue and add payment terms.**

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.

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



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

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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.'

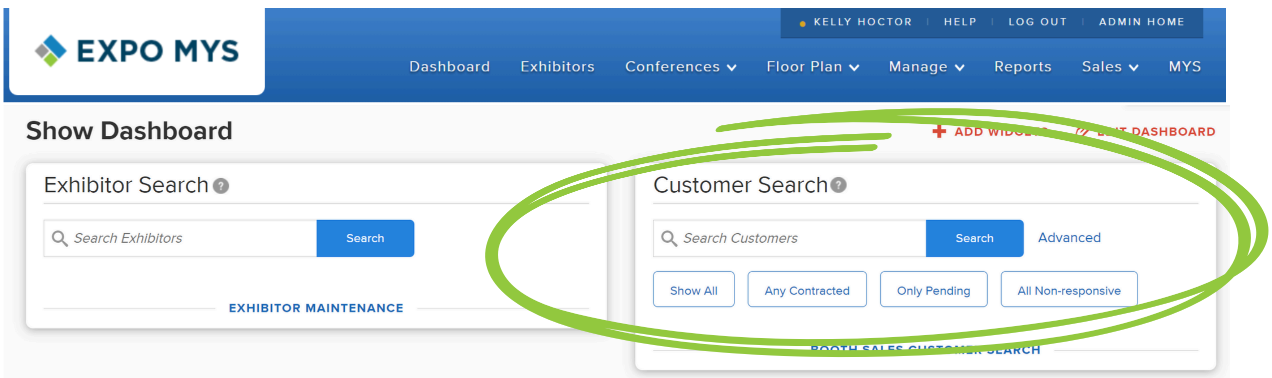
6 **Click 'Add Payment Term' to save.**

7 **Repeat steps 4, 5 & 6 as needed until the total payment equals 100%.**

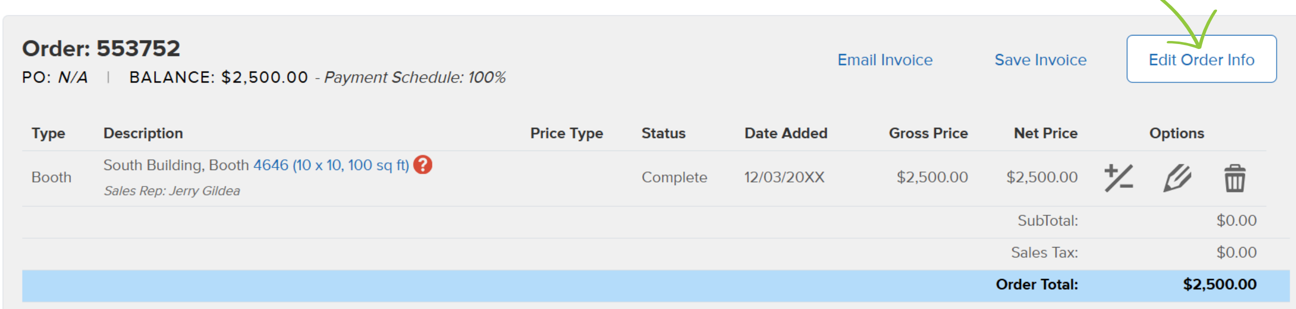
Apply a Payment Schedule

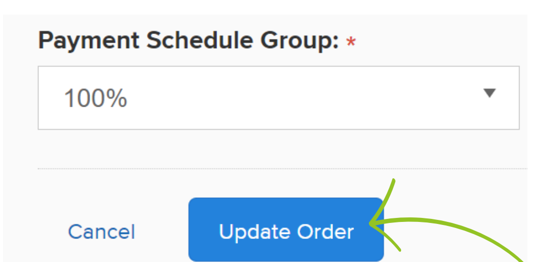
Occasionally, a customized payment schedule is necessary to accommodate specific customer needs. The steps below show how to apply a personalized schedule to a customer. If you still need to create your payment schedule, refer to the previous pages for guidance.

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.

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