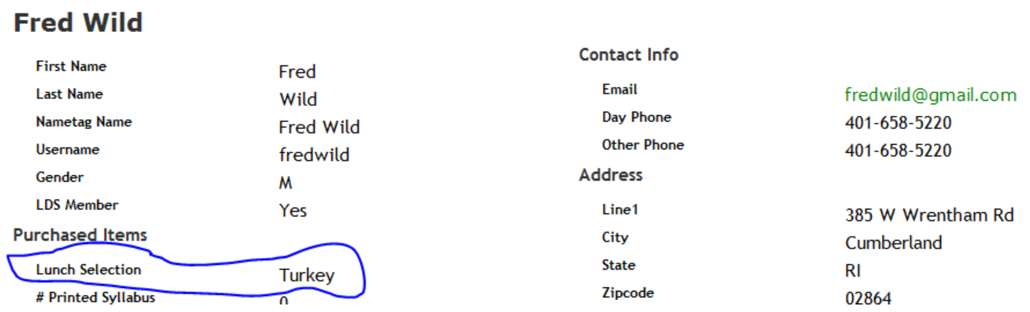
Processing Payments in the Family History Web Application

Here is the scenario:

Step 1: Fred and Diana Wild sign up to attend the conference. Diana has ordered a lunch with a ham sandwich ($7.00) and 1 printed syllabus ($8.00). Fred has just ordered a lunch with a turkey sandwich ($7.00).

Fred's conference page appears as follows:



Fred Wild

First Name	Fred
Last Name	Wild
Nametag Name	Fred Wild
Username	fredwild
Gender	M
LDS Member	Yes

Purchased Items

Lunch Selection	Turkey
# Printed Syllabus	0

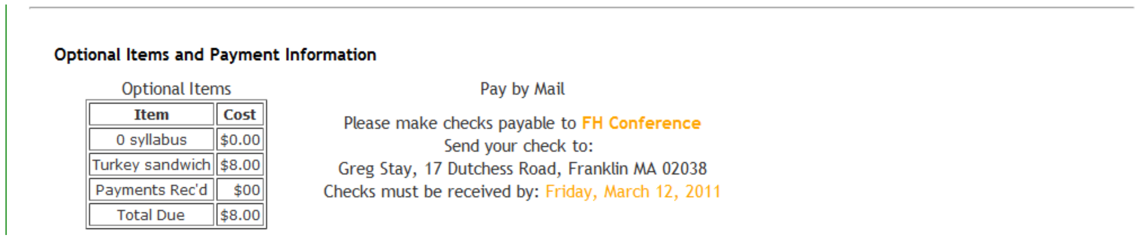
Contact Info

Email	fredwild@gmail.com
Day Phone	401-658-5220
Other Phone	401-658-5220

Address

Line1	385 W Wrentham Rd
City	Cumberland
State	RI
Zipcode	02864

The bottom of the page section shows how much is owed and for what, to whom to send the payment and when the deadline is for the payment.



Optional Items and Payment Information

Optional Items

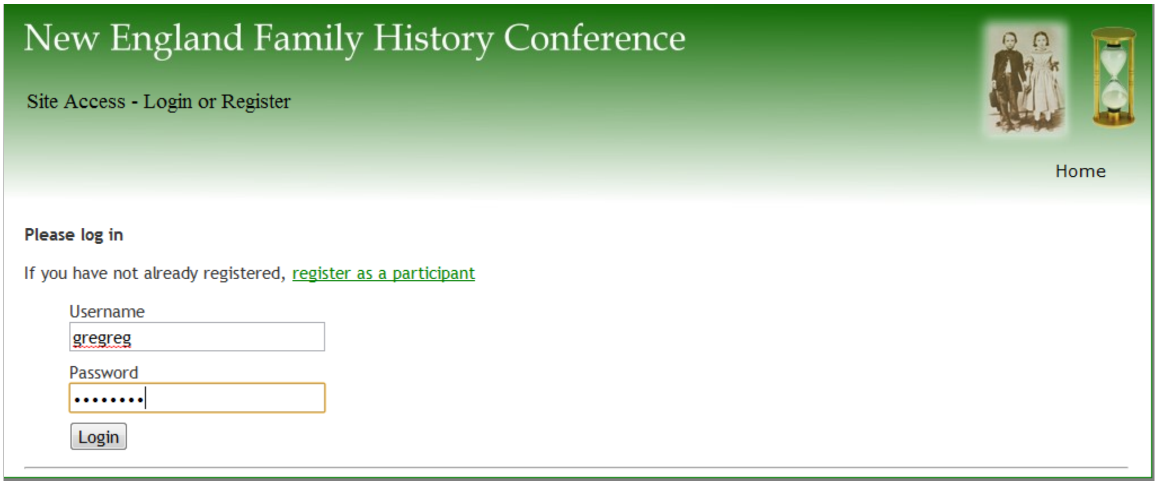
Item	Cost
0 syllabus	$0.00
Turkey sandwich	$8.00
Payments Rec'd	$00
Total Due	$8.00

Pay by Mail

Please make checks payable to FH Conference
Send your check to:
Greg Stay, 17 Dutchess Road, Franklin MA 02038
Checks must be received by: Friday, March 12, 2011

Step 2: You, the registrar, receive a check that has Diana's Name on it for $22.00 and the note says that it is also to cover Fred.

You log in to the website with your registrar's username and password.

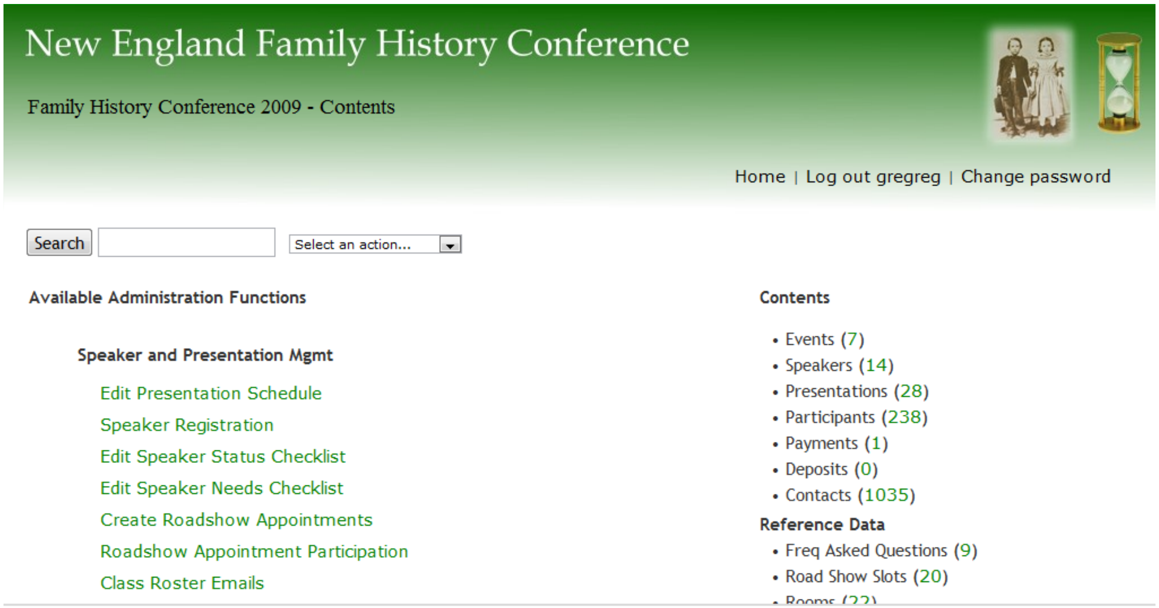

New England Family History Conference
Site Access - Login or Register
Home

Please log in

If you have not already registered, register as a participant

Username	gregreg
Password	••••••••

After you click on "Login", you will see the Admin page.



New England Family History Conference

Family History Conference 2009 - Contents

Home | Log out gregreg | Change password

Available Administration Functions

Speaker and Presentation Mgmt

- Edit Presentation Schedule
- Speaker Registration
- Edit Speaker Status Checklist
- Edit Speaker Needs Checklist
- Create Roadshow Appointments
- Roadshow Appointment Participation
- Class Roster Emails

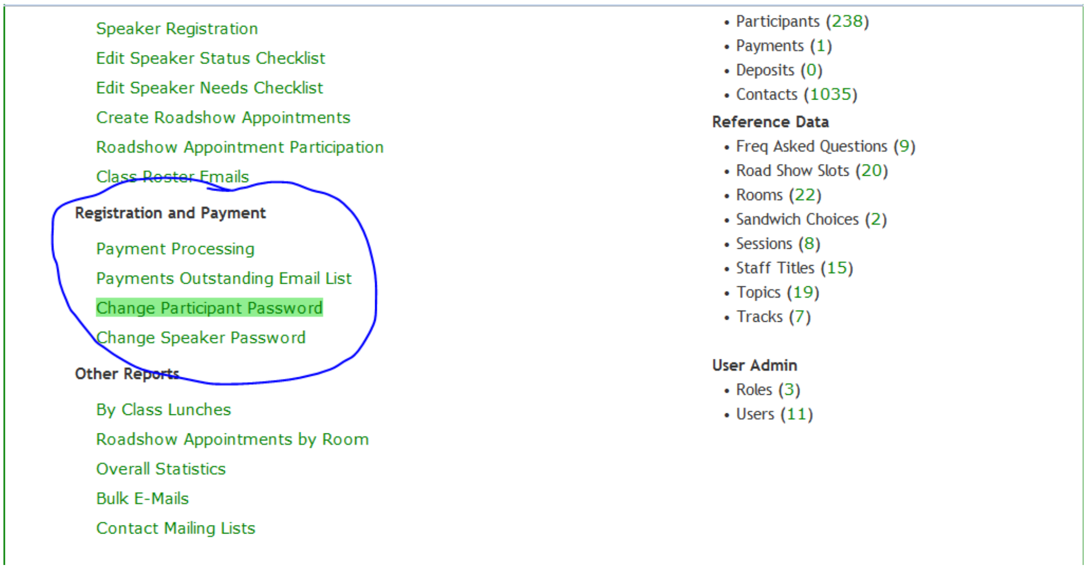
Contents

- Events (7)
- Speakers (14)
- Presentations (28)
- Participants (238)
- Payments (1)
- Deposits (0)
- Contacts (1035)

Reference Data

- Freq Asked Questions (9)
- Road Show Slots (20)
- Rooms (22)

Scroll to the lower part of the page. You will see a section on the left side called, “Registration and Payment”.



- Speaker Registration
- Edit Speaker Status Checklist
- Edit Speaker Needs Checklist
- Create Roadshow Appointments
- Roadshow Appointment Participation
- Class Roster Emails

Registration and Payment

- Payment Processing
- Payments Outstanding Email List
- Change Participant Password
- Change Speaker Password

Other Reports

- By Class Lunches
- Roadshow Appointments by Room
- Overall Statistics
- Bulk E-Mails
- Contact Mailing Lists

- Participants (238)
- Payments (1)
- Deposits (0)
- Contacts (1035)

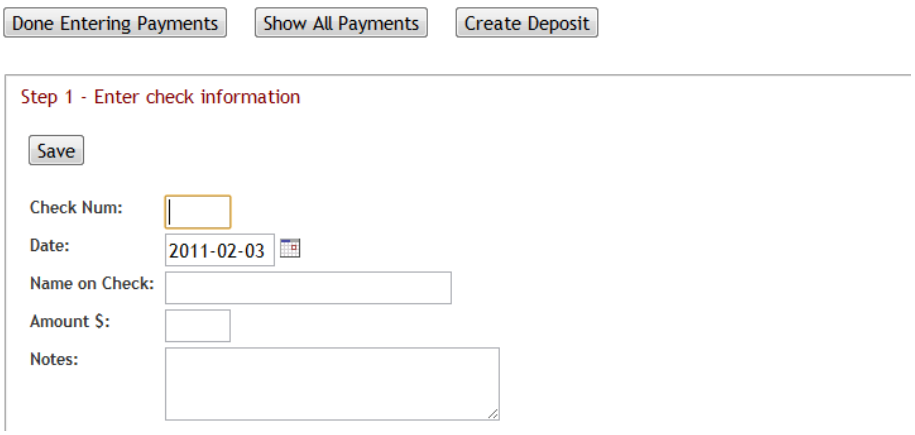
Reference Data

- Freq Asked Questions (9)
- Road Show Slots (20)
- Rooms (22)
- Sandwich Choices (2)
- Sessions (8)
- Staff Titles (15)
- Topics (19)
- Tracks (7)

User Admin

- Roles (3)
- Users (11)

Click on “Payment Processing” and you will see this

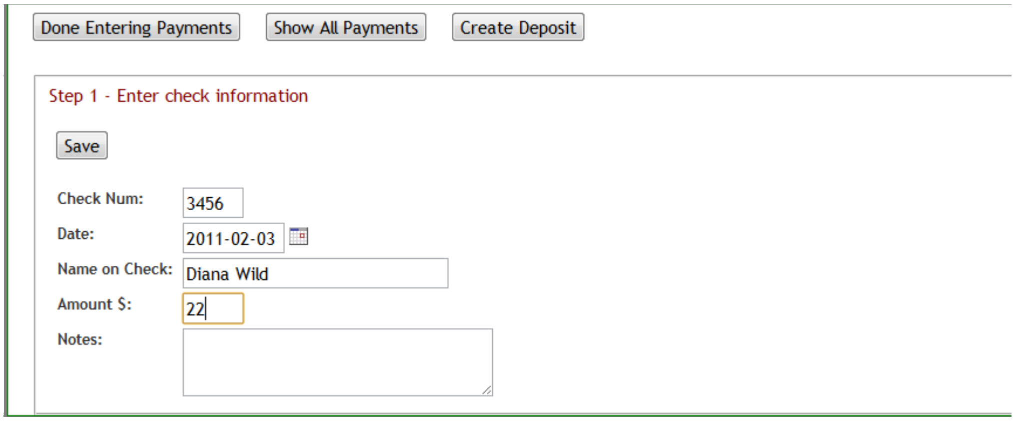


Step 1 - Enter check information

Check Num:
Date: 2011-02-03
Name on Check:
Amount $:
Notes:

There are three steps to the Payment Processing process.

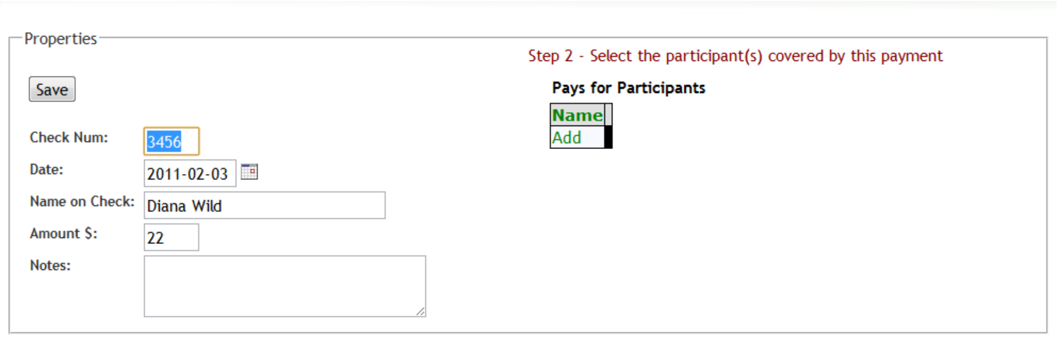
Enter the check number, the date received, the Name on the Check, the Amount of the check. Click on Save.



Step 1 - Enter check information

Check Num: 3456
Date: 2011-02-03
Name on Check: Diana Wild
Amount $: 22
Notes:

Select the Participants Covered by this Payment - Next you will see this screen, which presents an opportunity to identify an additional person for whom the check applies. This is infrequent but significant. In our scenario this does apply.



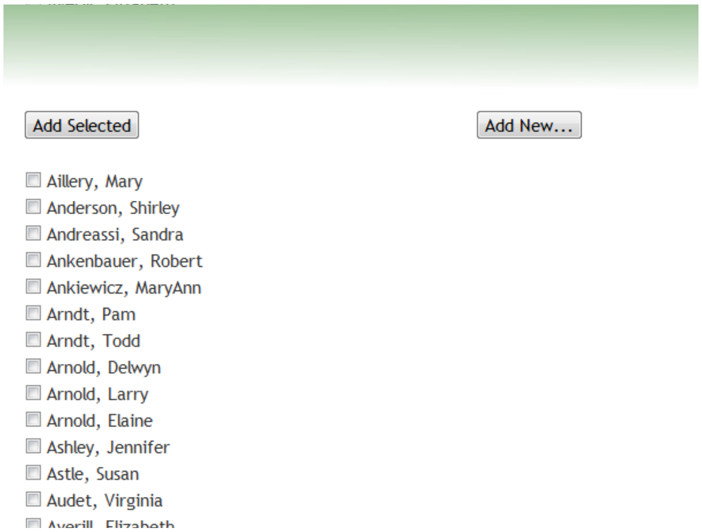
Step 2 - Select the participant(s) covered by this payment

Check Num: 3456
Date: 2011-02-03
Name on Check: Diana Wild
Amount $: 22
Notes:

Pays for Participants

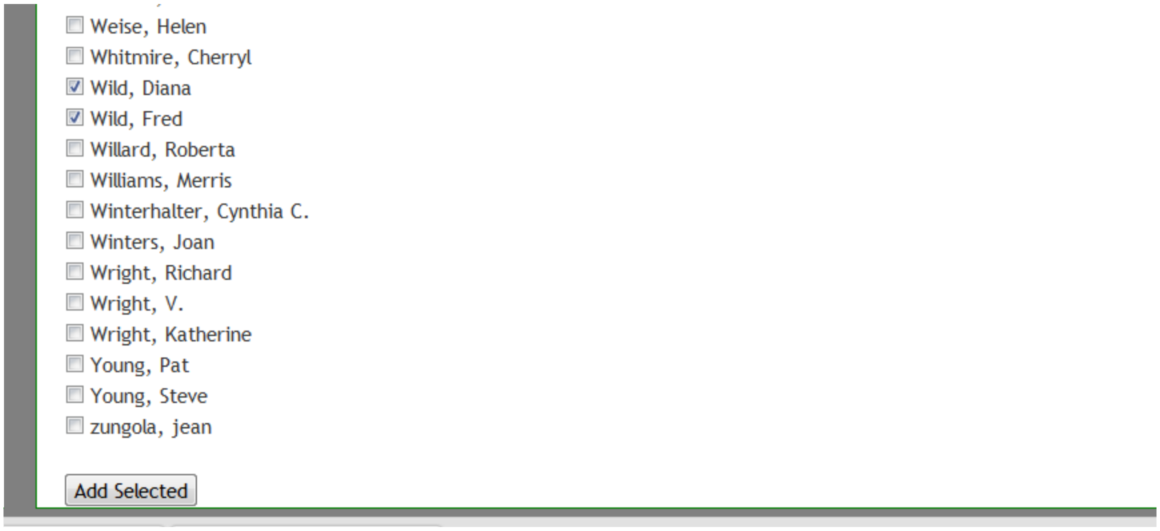
Name
Add

Click on "Add" under Step 2 and identify the name or names covered in addition to the person named on the check.



- ☐ Aillery, Mary
- ☐ Anderson, Shirley
- ☐ Andreassi, Sandra
- ☐ Ankenbauer, Robert
- ☐ Ankiewicz, MaryAnn
- ☐ Arndt, Pam
- ☐ Arndt, Todd
- ☐ Arnold, Delwyn
- ☐ Arnold, Larry
- ☐ Arnold, Elaine
- ☐ Ashley, Jennifer
- ☐ Astle, Susan
- ☐ Audet, Virginia
- ☐ Averill, Elizabeth

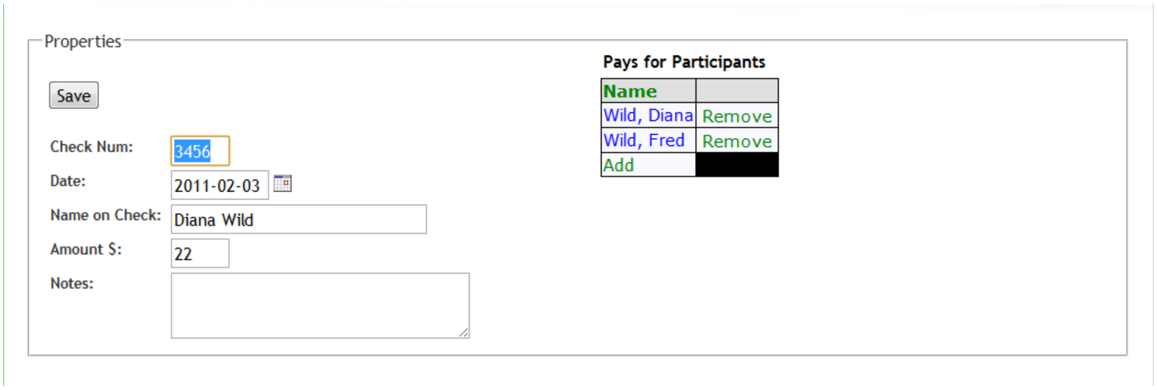
Click the box next to the name(s) that the check covers. Be sure to select everyone covered by the check even if one of the names is the same as the "Name on the Check". Then click on "Add Selected" (either at the top of the page or the bottom of the page).



- ☐ Weise, Helen
- ☐ Whitmire, Cherryl
- ☑ Wild, Diana
- ☑ Wild, Fred
- ☐ Willard, Roberta
- ☐ Williams, Merris
- ☐ Winterhalter, Cynthia C.
- ☐ Winters, Joan
- ☐ Wright, Richard
- ☐ Wright, V.
- ☐ Wright, Katherine
- ☐ Young, Pat
- ☐ Young, Steve
- ☐ zungola, jean

Add Selected

Now you're payment processing page looks like this. Click on "Save" to save this information to the database.



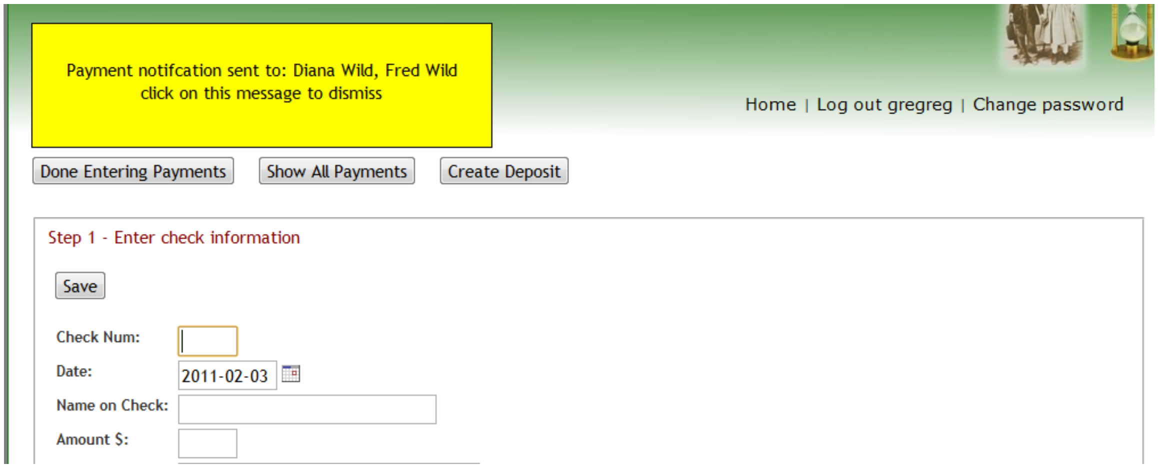
Properties
Save

Check Num: 3456
Date: 2011-02-03
Name on Check: Diana Wild
Amount $: 22
Notes:

Pays for Participants

Name	
Wild, Diana	Remove
Wild, Fred	Remove
Add	

The page will appear as follows. The yellow box indicates that a confirmation email message has been sent to the person or people who were covered by the check. Click on the yellow box to dismiss it.



Payment notifcation sent to: Diana Wild, Fred Wild
click on this message to dismiss

Home | Log out gregreg | Change password
Done Entering Payments
Show All Payments
Create Deposit

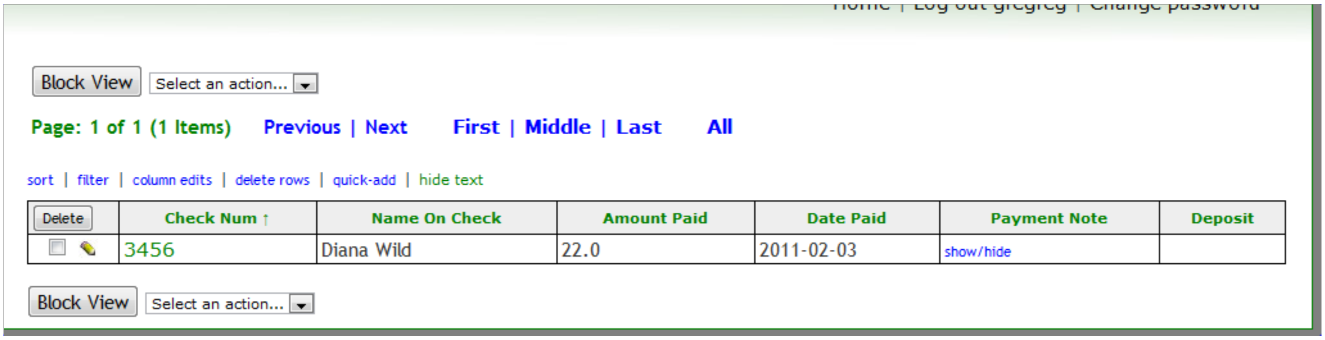
Step 1 - Enter check information

Save

Check Num:
Date: 2011-02-03
Name on Check:
Amount $:

You have finished entering the information about a check.

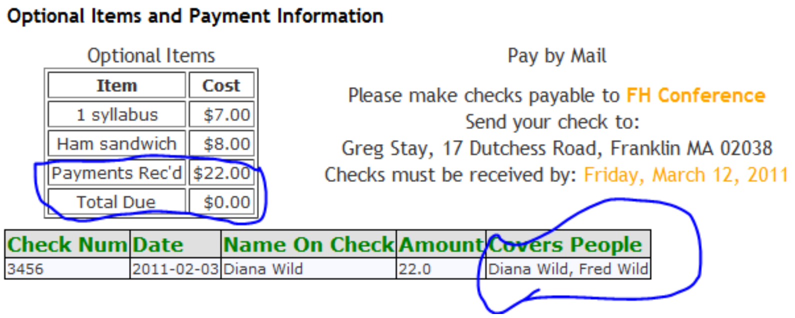
If you click on the “Show All Payments” button, you will get the following summary showing all the checks that have been received.


Home | Log out gregreg | Change password
Block View
Select an action...
Page: 1 of 1 (1 Items)
Previous | Next
First | Middle | Last
All
sort | filter | column edits | delete rows | quick-add | hide text
Block View
Select an action...

Delete	Check Num ↑	Name On Check	Amount Paid	Date Paid	Payment Note	Deposit
☐	3456	Diana Wild	22.0	2011-02-03	show/hide	

If you go back and look at Fred or Diana’s conference page, you will see the following:

Diana’s Page



Optional Items and Payment Information

Optional Items

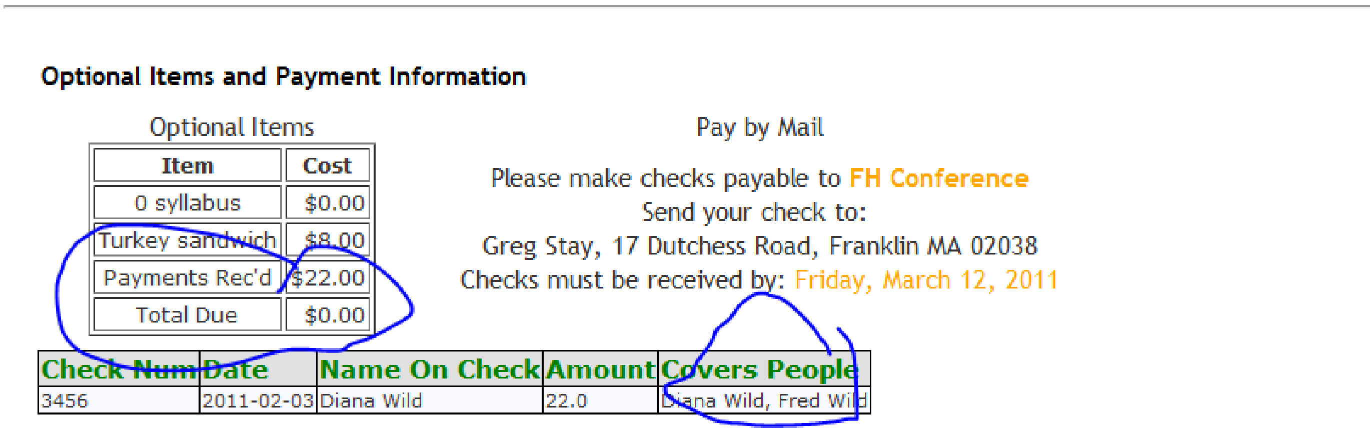
Item	Cost
1 syllabus	$7.00
Ham sandwich	$8.00
Payments Rec'd	$22.00
Total Due	$0.00

Pay by Mail

Please make checks payable to FH Conference
Send your check to:
Greg Stay, 17 Dutchess Road, Franklin MA 02038
Checks must be received by: Friday, March 12, 2011

Check Num	Date	Name On Check	Amount	Covers People
3456	2011-02-03	Diana Wild	22.0	Diana Wild, Fred Wild

Fred’s Page



Optional Items and Payment Information

Optional Items

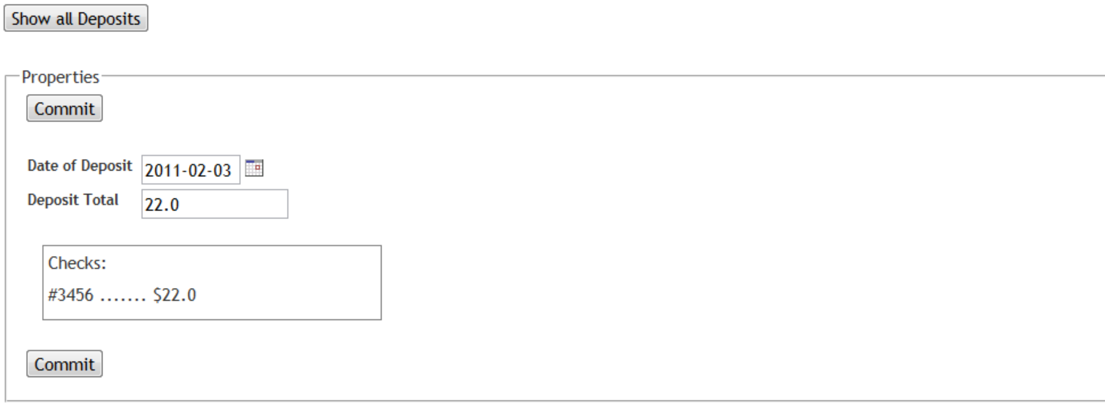
Item	Cost
0 syllabus	$0.00
Turkey sandwich	$8.00
Payments Rec'd	$22.00
Total Due	$0.00

Pay by Mail

Please make checks payable to FH Conference
Send your check to:
Greg Stay, 17 Dutchess Road, Franklin MA 02038
Checks must be received by: Friday, March 12, 2011

Check Num	Date	Name On Check	Amount	Covers People
3456	2011-02-03	Diana Wild	22.0	Diana Wild, Fred Wild

To create a deposit list of all the checks that you have processed thus far, click on “Create Deposit”. You will see this. In this case there is only one check in the list. Generally, you would wait until you have some number of checks to make up a deposit.



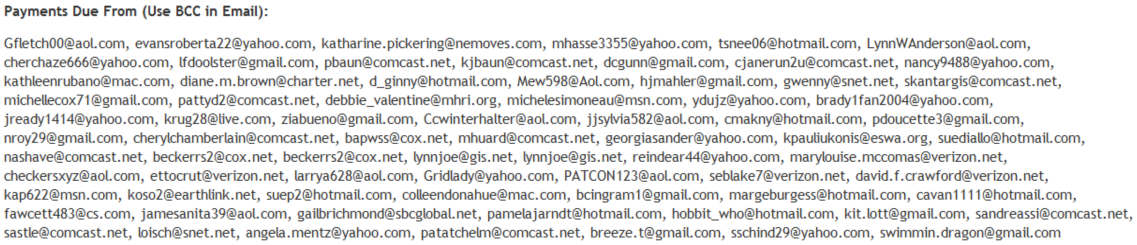
Date of Deposit 2011-02-03
Deposit Total 22.0

Checks:
#3456 .... $22.0

Next you will package up the checks with the deposit slip and take them to the bank.

Payments Outstanding Email List

This takes you to a page that lists the email address of everyone who has not forwarded us their payment and they have something they need to pay for. This is handy shortly before the conference to keep track of this information. This list can be cut and pasted into an email system so you can write a message to remind them to pay for what they have ordered.



Payments Due From (Use BCC in Email):

Gfletch00@aol.com, evansroberta22@yahoo.com, katharine.pickering@nemoves.com, mhasse3355@yahoo.com, tsnee06@hotmail.com, LynnWAnderson@aol.com,
cherchaze666@yahoo.com, lfdoolster@gmail.com, pbaun@comcast.net, kjbaun@comcast.net, dcgunn@gmail.com, cjanerun2u@comcast.net, nancy9488@yahoo.com,
kathleenrubano@mac.com, diane.m.brown@charter.net, d_ginny@hotmail.com, Mew598@Aol.com, hjmahler@gmail.com, gwenny@snet.net, skantargis@comcast.net,
michellecox71@gmail.com, pattyd2@comcast.net, debbie_valentine@mhri.org, michelesimoneau@msn.com, ydujz@yahoo.com, brady1fan2004@yahoo.com,
jready1414@yahoo.com, krug28@live.com, ziabueno@gmail.com, Ccwinterhalter@aol.com, jjsylvia582@aol.com, cmakny@hotmail.com, pdoucette3@gmail.com,
nroy29@gmail.com, cherylchamberlain@comcast.net, bapwss@cox.net, mhuard@comcast.net, georgiasander@yahoo.com, kpauliukonis@eswa.org, suediallo@hotmail.com,
nashave@comcast.net, beckerrs2@cox.net, beckerrs2@cox.net, lynnjoe@gis.net, lynnjoe@gis.net, reindear44@yahoo.com, marylouise.mccomas@verizon.net,
checkersxyz@aol.com, ettocrut@verizon.net, larrya628@aol.com, Gridlady@yahoo.com, PATCON123@aol.com, seblake7@verizon.net, david.f.crawford@verizon.net,
kap622@msn.com, koso2@earthlink.net, suep2@hotmail.com, colleendonahue@mac.com, bcingram1@gmail.com, margeburgess@hotmail.com, cavan1111@hotmail.com,
fawcett483@cs.com, jamesanita39@aol.com, gailbrichmond@sbcglobal.net, pamelajarndt@hotmail.com, hobbit_who@hotmail.com, kit.lott@gmail.com, sandreassi@comcast.net,
sastle@comcast.net, loisch@snet.net, angela.mentz@yahoo.com, patatchelm@comcast.net, breeze.t@gmail.com, sschind29@yahoo.com, swimmin.dragon@gmail.com

So now you know how to process payments in the new system.