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Adding a Pro-Rate Rule:

In the *Setup Unit Service & Fees* section of the PPCT, select the Unit & Service and hit edit. The Pro-Rate rule can be setup at either the Unit level or the Default Values (All Units) level. On the appropriate tab, click on the Plus sign next to the box that says Pro-Rate Rule.

Edit Unit Service Properties

Service Name: Service Abbrev: (max 10 characters)

Recurring Billing Monthly Flat Fee - Participants are charged the same flat fee amount per month. Prorate options are supported for both the first and last month.

Choose Service Type

- General Membership
- Recurring Billing - Based on Daily
- Recurring Billing - Monthly Flat Fee
- One Time Payment
- Drop-In
- Fixed Price
- Free

Values for this Unit Only | Default Values (All Units) | Pre-Requisites

Service Description:

Text Box Style

- Plain Text
- Rich Text

Generate a Membership Enrollment Record when this Service is Selected

Account Code:

Minimum Downpayment Amount:

Pro-Rate Rule: ...

Show this Service on the Parent Portal Website

- Upon Activation
- For a limited period of time

Between: and:

Remember that the rules that you setup here will also apply if a parent signs up in the middle of the year, so even if you do not need to pro-rate the first month of the school year, you will need to account for the way that you want this to act if a new member signs up in the middle of January, for instance.

Also, be aware that the number of days that you are putting in the boxes are DAYS OF ENROLLMENT, not calendar days, so 2 weeks would be 10 days, not 14, for a Monday through Friday service.

You also have the option of creating and using a Minimum Down payment Amount.

1. Give the rule a name
2. Configure the FIRST and LAST MONTH BILLING AMOUNT. If you are going to Charge a Minimum amount then fill that amount in on the previous screen.
3. Click Create and Close the Form at the bottom (it can be edited later if necessary)

Add a First Month/Last Month Charge Amount Rule

First Month/Last Month Charge Amount Rule Name: Monthly Pro-Rate Rule

FIRST MONTH BILLING AMOUNT
Take the following action based on the number of days that the member can attend for his/her FIRST month:

Charge a Minimum is between: 0 and: 0 days, Charge the MINIMUM Downpayment Amount

Use Prorate Rule between: 1 and: 10 days, PRORATE 1st Month as Downpayment Amount

Charge Full Rate between: 11 and: 31 days, Charge the FULL Monthly Rate

Also charge the Minimum amount as a Downpayment if enrollment begins in a future month

LAST MONTH BILLING AMOUNT
Take the following action based on the number of days that the member can attend for his/her LAST month:

Charge Nothing for between: 0 and: 0 days, Do NOT Charge for the last Month

Use Prorate Rule between: 1 and: 10 days, PRORATE the Charge for the last Month

Charge Full Rate between: 11 and: 31 days, Charge the FULL Monthly Rate

Create and Add Another Create and Close this Form Close

The rule shown above, for example, would pro-rate both the first and last month's rate so that anyone who has more than 10 days of enrollment in the month will pay full price and anyone with less than 10 days will pay the number of days of enrollment times the system calculated daily rate, which is based on the month during the service with the greatest number of days of service (usually 22).

Add a First Month/Last Month Charge Amount Rule

First Month/Last Month Charge Amount Rule Name: Pro-Rate Rule #1

FIRST MONTH BILLING AMOUNT
Take the following action based on the number of days that the member can attend for his/her FIRST month:

Charge a Minimum is between: 0 and: 2 days, Charge the MINIMUM Downpayment Amount

Use Prorate Rule between: 3 and: 10 days, PRORATE 1st Month as Downpayment Amount

Charge Full Rate between: 11 and: 31 days, Charge the FULL Monthly Rate

Also charge the Minimum amount as a Downpayment if enrollment begins in a future month

LAST MONTH BILLING AMOUNT
Take the following action based on the number of days that the member can attend for his/her LAST month:

Charge Nothing for between: 0 and: 0 days, Do NOT Charge for the last Month

Use Prorate Rule between: 1 and: 10 days, PRORATE the Charge for the last Month

Charge Full Rate between: 11 and: 31 days, Charge the FULL Monthly Rate

Save Changes Cancel

Alternately, this rule would charge whatever amount you set up as the Minimum for up to 2 days of service and then at the 3rd day, switch over to calculating the pro-rated amount. And in this example, we have chosen to also mark the flag to charge minimum if the enrollment begins in a future month.