

Pay-As-You-Go services

A **Pay-As-You-Go** service is one whereby the client accumulates charges based on how many sessions they attend in the period. The client is only invoiced once the session has been marked as '**Attended**', '**Late Cancel**' or '**No Show**'.

For example, if I sell a **Pay-As-You-Go** service to a client and use this to add them to a booking, at this point, there is an invoice generated for the session with \$0 on it as the session is still '**Active**'.

Once I **attend (Late Cancel or No Show)** that person, the invoice has the session value added to it.

I can then use that **same** service in their next booking without having to sell another one. Once they are marked as '**Attended**' in that next booking, the cost of that service is added to their initial invoice. For each attendance, the invoice accumulates the amount of that service as instalments under the invoice.

This is really handy for people who bill their clients at the end of a particular period for however many sessions they have done because you don't have to sell a session each time – simply booking the client in and **marking them as attended** generates the initial invoice. Subsequent attendances add the cost of the booking to the same invoice (it creates instalments under the invoice). If the booking is not marked as attended, then the cost of that booking is not added to the invoice.

PAYG and Direct Debits

The other benefit of PAYG sessions is for direct debits. For those people who never quite know how many sessions they will do each week, they are currently locked in to 1 per week or 2 per week etc. and the instalments are all pre-created. This means crediting invoices or adding invoices if the client changes the number of sessions they do that week....manual intervention.

By using **PAYG** sessions, you can set them up to be **flagged for billing** automatically as soon as they are generated. If you run billing every fortnight, then every session they did in those two weeks will have been added to their invoice (as an instalment) and that amount then gets sent to the billing company. If they did 6 sessions this fortnight, they will be billed for 6 sessions. If they do only 3 sessions the following fortnight, then they will only be billed for those 3 sessions.

Setting up PAYG services

Go to File > Location Setup > Manage Services & Packages.

Create the New package as a '**Multiple Sessions package**' and give it a name.

On the Instalments screen, select the **PAYG** option, '**Service is charged for at time of attendance**'. You can then also elect to have that invoice automatically flagged for billing (i.e. it will be included in your Process Billing list of invoices).

Instalments

Service is paid up-front
 Select this option if this service is to be paid for as an up-front payment. This will result in only one invoice being generated for the service.

Service is to be paid for by instalments
 Select this option if this service is to be paid for on a periodic, recurring basis (such as fortnightly or monthly). Individual instalments will be generated for

Frequency:

Session Allocation Preference:

Service is charged for at time of attendance (pay as-you-go)
 If this option is selected, an invoice will be generated automatically each time the client is marked as Attended in bookings. The invoice amount will be for the single session being attended.

Automatically flag pay-as-you-go invoices for billing

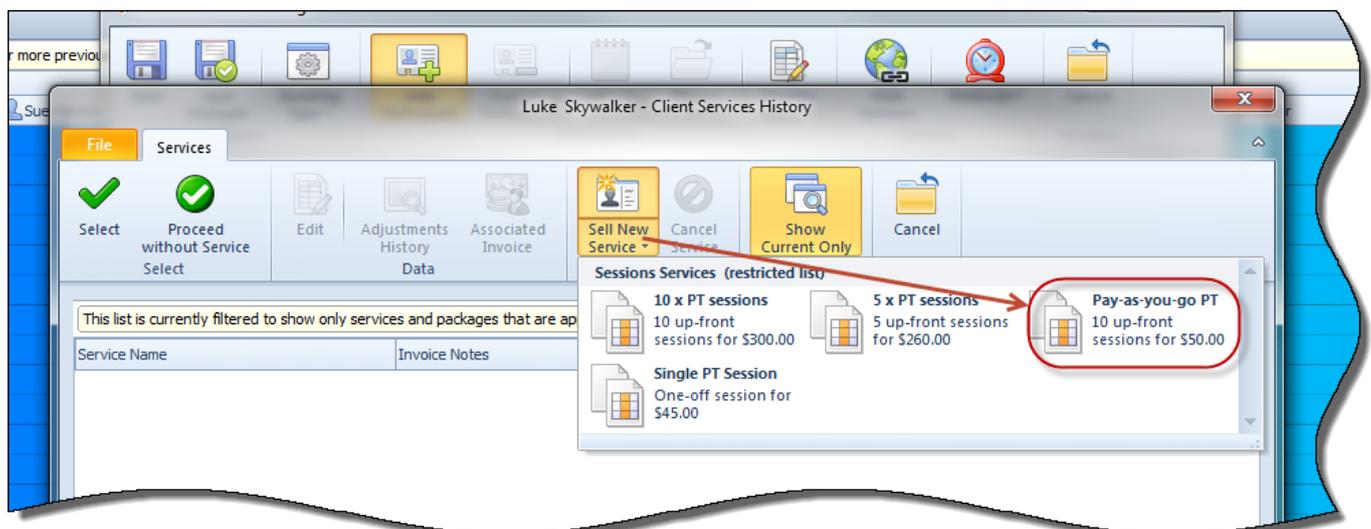
Price the item (the per session price) and continue the rest of the setup as normal. Be sure to link this new service to the appropriate Booking Type.

Note that the default expiry for these PAYG packages is 52 weeks.

Sell the PAYG Package to Client

On the Bookings Explorer screen, create a new booking for your client and add participant.

Sell the client the **PAYG** service from within the booking (you can also sell it from the Clients & Enquiries screen).



The client is now in the booking with his new service and is still **'Active'**. Save the booking.

Resources: Kim Becker

Start time: 20/12/2012 10:00 Duration: 1 hour

Participants List for this Booking: Participant Capacity: 1, Slots Remaining: 0

Type	Name	Service to Use	# Left	Status	Mark As
Client	Luke Skywalker	Pay-as-you-go PT (exp: 19/12/2013)	1	Active	Attended

At this point, you can see in his **'Services'**, he has his 1 session to use...

Last Renewed Date: 02/10/2012 Primary Contact:

Services Details

Edit... View Adjustments History Other Actions Print Show Current Services Only

Service Name	Invoice Notes	Date Sold	Total	Remaining	Expiry Date
Pay-as-you-go PT		20/12/2012	0	1	19/12/2013

... but there is **NO \$ value on the invoice** yet in his account.

Voucher Credits Remaining: \$30.00

Take Payment... Refund... Credit... Other Actions Show: Unpaid invoices only

Invoices List for Client: (No Invoice Selected)

Trans. ...	Due Date	Inv. #	Description	Inv. Amount \$	Applied \$	Balance \$	Date	Type	Rec.
<There are no items shown in this list.>									

Once I mark the booking as **'Attended'**, the invoice has the \$ value for the session added to it, not before.

Total Amount Owning: \$50.00

Voucher Credits Remaining: \$30.00

Take Payment... Refund... Credit... Other Actions Show: Unpaid invoices only

Invoices List for Client:

Trans. ...	Due Date	Inv. #	Description	Inv. Amount \$	Applied \$	Balance \$	Date
20/12/2012	20/12/2012	347	Pay-as-you-go PT - Session Attend...	\$50.00	\$0.00	\$50.00	

This **PAYG** service can be re-used. It is only when the booking is marked as **'Attended'** (**Late Cancel** or **No Show**) that the cost of the service is added to the invoice (via an instalment) and the service is automatically given another session for the next booking.

So, if I do a **Save Multiple**, all I have to do when the booking time arrives, is mark the client as **'Attended'**. The invoice accumulates the amounts and another session is added to be used in the next booking....all automatically.

If you need to change the status *back to 'Active'*, the charge will automatically be deducted from the client account.

In the screen shot below, you can see that Luke has attended 2 PAYG sessions. The rest are his future bookings...

Client Bookings List

Date Last In: 20/12/2012 13:00 Total Attendances: 18 (Includes membership sign-ins)
 Attendances this Month: 2

Print Export... Display Bookings From: 13/08/2012 To: 29/12/2012 Remove Bookings...

Session Status	Booking	Service	Resources	Start	Finish
Attended	1 on 1 PT	Pay-as-you-go PT	Kim Becker	20/12/2012 10:00	20/12/2012 11:00
Attended	1 on 1 PT	Pay-as-you-go PT	Kim Becker	20/12/2012 13:00	20/12/2012 14:00
Active	1 on 1 PT	Pay-as-you-go PT	Kim Becker	21/12/2012 13:00	21/12/2012 14:00
Active	1 on 1 PT	Pay-as-you-go PT	Kim Becker	22/12/2012 13:00	22/12/2012 14:00
	1 on 1 PT	Pay-as-you-go PT			23/12/2012 14:00

His account reflects the cost of those 2 attended bookings....all on the one invoice...

Total Amount Owning: \$100.00
 Voucher Credits Remaining: \$30.00

Take Payment... Refund... Credit... Other Actions Show: Unpaid invoices only

Invoices List for Client:

Trans. ...	Due Date	Inv. #	Description	Inv. Amount \$	Applied \$	Balance \$	Date
20/12/2012	20/12/2012	347	Pay-as-you-go PT - Session Attend...	\$100.00	\$0.00	\$100.00	

If you then double click on the invoice, you will see separate instalment invoices for each of the attendances.

Pay-as-you-go PT (Luke Skywalker) - Recurring Payments

File Recurring Payment

Take Payment Credit Change Due Date Payment Flag Invoice for Billing Print Invoice Close

Client Name: Luke Skywalker
 Service Name: Pay-as-you-go PT
 Recurrence Frequency: Fortnightly

Trans. Date	Due Date	Charge #	Description	Inv. Amount \$	Applied \$	Balance \$
20/12/2012	20/12/2012		Pay-as-you-go PT - Session Attendance	\$50.00	\$0.00	\$50.00
20/12/2012	20/12/2012		Pay-as-you-go PT - Session Attendance	\$50.00	\$0.00	\$50.00

