online billing
user guide

CPS Document 1.0

about this cps document

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v1.0	2018-12-28	AR	First release

online billing overview

With Online Billing, your customers go to a web address, which you provide, to log in and manage bills. They view the balance of ledgers, prepaid accounts, smart cards, credit books, and loyalty points. Customers can also make a payment online.

Sales record details are available at a click. If a customer has a question, a billing inquiry can be made immediately via an email that will automatically include a reference to the specific sale number and customer account in question.

The CPS Online Billing module will help your accounting tasks go smoothly.

Set Up Your Online Billing Website

Upon installation, Club Prophet Systems will configure your module and give you a website address for the Online Billing login screen.

Your administrative login allows you access to controls that customize your facility's login page along with the rest of the Online Billing module.

You will distribute the same website address to customers so they can access statements and make payments.

What Can I Customize?

Log in with the administrative credentials to access the following options:

Custom CSS

The term CSS stands for "cascading style sheet" and controls the website's visual design. This section allows you to adjust the look by changing the font style and color scheme. You may simply keep the default settings. It is not necessary to make any changes in the Custom CSS section.

Email

This section enables you to send email messages to customers who use the Online Billing system. Club Prophet Systems provides an SMTP mail server, but you may override the default settings if you wish to use your facility's own SMTP server.

Option

This section controls which data fields display on monthly statements. Many fields are available, such as loyalty point balances, aging, notes, etc. Importantly, this section also controls the Payment Options and provides the fields for configuring how to process ACH and credit card payments.

Web

It is important to review this section before distributing the Online Billing link to your customers. The Web section controls what displays on Online Billing webpages.

You can add your facility's logo and a welcome message or instructions. You can customize error messages. Set whether a customer logs in with an account number, email address, or user name.

Set the Login Options

Select the Web link from the top navigation bar to customize how the login page will look, what messages it will display, and what messages the customer will receive to confirm payment or if the website encounters an error.

Options:

- **Login Mode:** Choose username, email address, and/or account number.

- **Club Logo:** Upload a graphic file to be displayed on the Login webpage.

- **Credit Card:** Select which credit cards your facility will accept for payment.

- **Header Message:** Enter an optional greeting for the Login webpage.

- **Detail Message:** Enter an optional message for the Login webpage.

- **Payment Note:** Enter a message that will display when the customer clicks to make an online payment. The message displays whether or not a payment is made, so do not use "Thank you for your payment" because it could be mis-leading.

- **Site Name:** Enter your facility's name.

- **Site Address:** Enter the facility's address.

- **Site Phone:** Enter a contact phone number for your facility.

- **Error Message:** Enter an error message to be displayed in the event of a website problem, such as "Online billing is unavailable at this time. For billing inquiries, please contact Bill at 123-456-7890."

- **Admin Email** and **Admin Password:** Manage the login as needed, such as when employees leave their position and new credentials are needed for another employee.

For additional options, go to the **Option** link from the top navigation.

Set the View and Statement Options

Select the Option link from the top navigation bar to select what data the customer can view through online billing and what data will be available on the statements.

The Option webpage presents the following settings:

View Options

- Default Prepaid Screen: Displays the Prepaid balance upon login instead of the statement balance.

- Minimums: Check this option if your facility sets food minimums for members.

- Prepaid: Check this option if your facility allows members to use prepaid accounts.

- Loyalty Points: Displays loyalty program data.

- Smart Cards: Check this option if your facility uses smart cards. Displays the credit value.

- Expired and 0 Quantity Smart Card checkbox: Shows a quantity for inactive Smart Cards.

- Credit Book: Displays the customer's credit book value.

- Display Credit Balance on Home Page: Displays the balance even if a 0 value or positive credit.

- Aging: Shows billing cycles over time, any unpaid balances, and any related finance fees.

- Sale Notes: Displays any sales note entered on a sale when the customer clicks to view the details of a sale.

- Forgot Password: If unchecked, the site will not display the option to reset a forgotten password. Some facilities would prefer customers to call or speak to an employee for assistance.

- Edit Profile: Allows customers to edit their user names and email addresses.

- Show Invoice Message: Displays any note entered on an invoice.

- Rename Prepaid to: Enables the Prepaid field to have a custom name, e.g., Loyalty Bucks. Enter the custom name in the text field.

For additional options, go to the **Web** link from the top navigation.

Statement Options

Select the checkboxes to allow the data to display on the statement:

- $0.00 Transactions

- Amount Due = $0.00 if have credit balance

- Transactions Only Affecting Balance

- Current Charges Hidden

- Default to Current Charges

Enter the following values to set how many billing cycles to display:

- Show Last [NUMERAL] Billing Cycles

- Hide Billing Cycles Older Than [DATE]

Configure Payment Options

1. Log in with the administrative credentials.
   The Online Billing module will open.

2. Select **Option** from the top navigation bar.
   The Option screen will display a list of form fields.

3. Scroll by the View Options and the Statement Options to see **Payment Options**.

   Consider the payment options available according to your credit card transaction agreement. Enter the requested data according to your agreement:

   • **Linked 2 Pay ACH**, enter: URL, Report URL, Access Key, and Template Name.

   • **Moneris**, enter: Host, Store ID, API Token and, if appropriate, select the checkbox "Use Hosted Paypage", API URL, Store ID, and Key.

   • **CPS Credit Card Engine for PADSS 2016 Settings.** Check the box next to User CPS Credit Card Engine PADSS2016, and enter: Host, Username, User Token, and Credit Card Parent Terminal.

4. When finished, select **Save**.

contact cps support

Outstanding "Anytime" Assistance for All of Your Questions

Whether you need a quick answer, want to see a demonstration, need more detailed instructions, or have a big challenge to solve that is specific to your facility, the CPS Support Team is ready to help! Send us an email and we will respond promptly.

support@cps.golf

United States Technical Support Line

724-270-0200

International Technical Support Line

+31 20 450 99 81

From 9:00 to 21:00, Central European Time, or press the pager option.

About Club Prophet Systems

For over 26 years, Club Prophet Systems has designed fully integrated golf management software systems for point-of-sale (POS), food and beverage (F&B), customer history and member management with billing and online statements, real time tee sheet scheduling and online tee time reservations, email marketing, mobile solutions, integrated credit card processing, reporting, inventory, and much more. Serving over 1,700 facilities in 16 countries in 9 languages, CPS provides solutions for every type of golf facility, including driving ranges, public and private courses, resort and municipal destinations, multi-course operators and management companies. CPS can tailor a system to fit every need and budget. Learn more at www.ClubProphetSystems.com.