

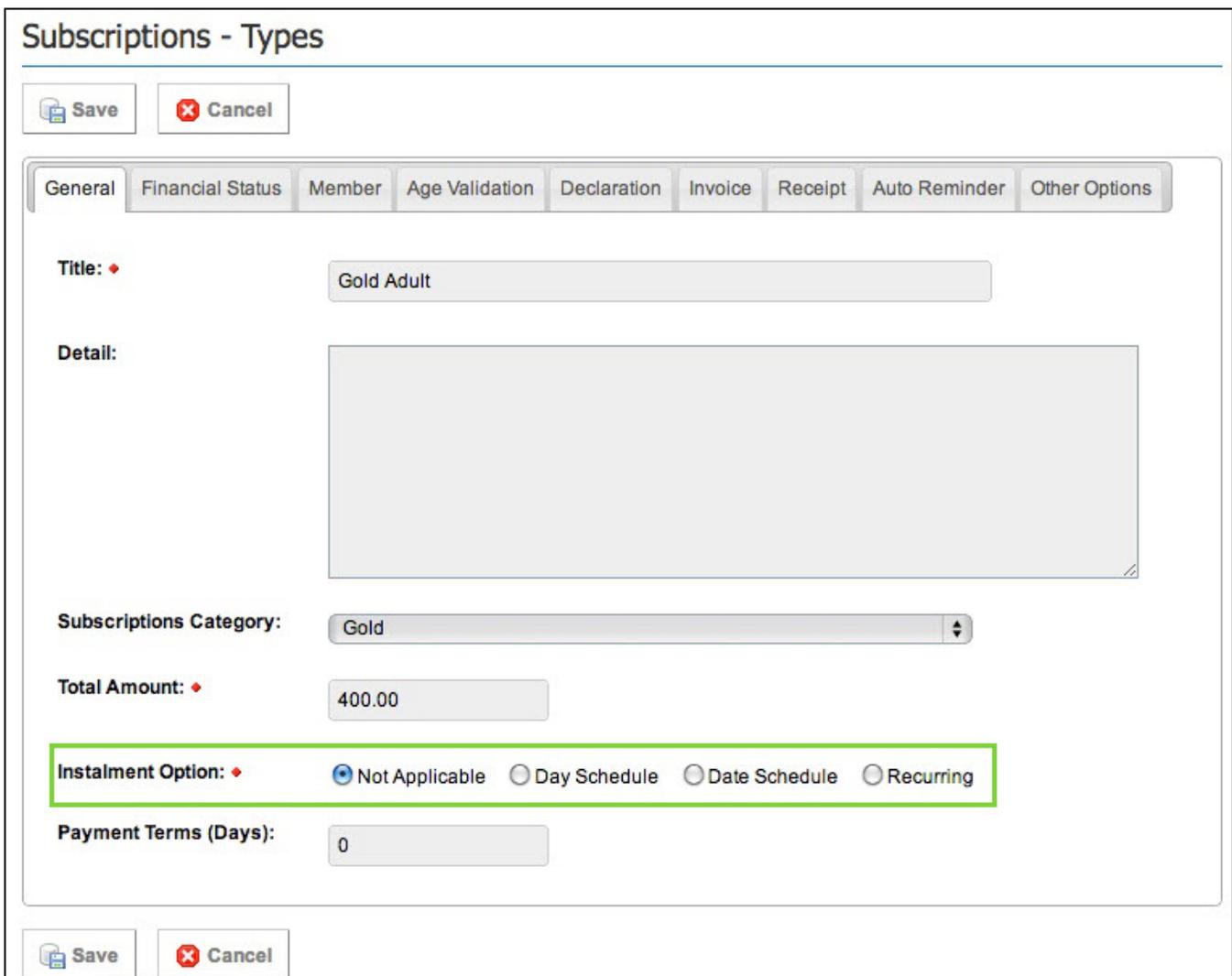
# Creating an Instalment Schedule

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## Quick Steps: Subscriptions > Subscription Types > Edit > Schedule

Once Instalments has been added for your organisation, you then need to create Instalment Schedules on the Subscription Types that you wish to offer Instalments for. This is all set up through the Subscription Type.

1. Within the Management Console, select **Subscriptions** from the top menu, then **Subscription Types** from the left menu.
2. Find the Subscription Type that you wish to add an Instalment Schedule to and click **Edit** next to the Type.
3. In the **General** tab, you'll find **Instalment Schedule**, set this to Date Schedule to set specific dates for payments to come out, or Recurring to have dates come out on a recurring interval.



The screenshot shows the 'Subscriptions - Types' form with the following fields and values:

- Title:** Gold Adult
- Detail:** (Empty text area)
- Subscriptions Category:** Gold
- Total Amount:** 400.00
- Instalment Option:** Not Applicable (selected), Day Schedule, Date Schedule, Recurring
- Payment Terms (Days):** 0

The 'Instalment Option' field is highlighted with a green border. The form also features 'Save' and 'Cancel' buttons at the top and bottom.

4. Click **Save** to make changes and in the view screen, you'll now see **Schedule** at the top

of the page, click this.

### Subscriptions - Types

[Listing](#) [Edit](#) [Schedule](#) [Add](#) [Delete](#)

*Record successfully updated in system*

**General** Financial Status Member Age Validation Declaration Invoice Receipt Auto Reminder Other Options

<b>Code:</b>	135772
<b>Title:</b>	Gold Adult
<b>Detail:</b>	N/A
<b>Category:</b>	Gold
<b>Total Amount:</b>	\$400.00
<b>Instalment Option:</b>	Date Schedule
<b>Payment Terms (Days):</b>	0

5. Click **Edit** to set up the schedule dates.

6. If using the Date Schedule, select the Date and then the Value to be deducted on that date. You can also add an additional charge to any of the Schedule Dates.

## Date Schedule

 Save

 Cancel

Instalment	Date	Value	Charge
1	<input type="text"/>	0.00	0.00
2	<input type="text"/>	0.00	0.00
3	<input type="text"/>	0.00	0.00
4	<input type="text"/>	0.00	0.00
5	<input type="text"/>	0.00	0.00
6	<input type="text"/>	0.00	0.00
7	<input type="text"/>	0.00	0.00
8	<input type="text"/>	0.00	0.00
9	<input type="text"/>	0.00	0.00
10	<input type="text"/>	0.00	0.00
11	<input type="text"/>	0.00	0.00
12	<input type="text"/>	0.00	0.00

 Save

 Cancel

7. Click **Save** to update the schedule, and you'll now see a breakdown of the amounts in the schedule.

## Date Schedule

 Previous

 Edit

Instalment	Date	Value	Charge
1	05-Dec-2012	\$40.00	\$5.00
2	05-Jan-2013	\$40.00	\$0.00
3	05-Feb-2013	\$40.00	\$0.00
4	05-Mar-2013	\$40.00	\$0.00
5	05-Apr-2013	\$40.00	\$0.00
6	05-May-2013	\$40.00	\$0.00
7	05-Jun-2013	\$40.00	\$0.00
8	05-Jul-2013	\$40.00	\$0.00
9	05-Aug-2013	\$40.00	\$0.00
10	05-Sep-2013	\$40.00	\$0.00
11		\$0.00	\$0.00

**Note:** An Instalment Schedule allows the member to select to have their membership payment deducted over a period of time. Add a charge to any Schedule Date to include a transaction fee in the schedule.

## Related Articles

[template("related")]