



Multiple Funding Accounts

User Guide

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Contents

1	Introduction	1
2	Multiple Funding Account for Payor	1
2.1	TAP Accounts	1
2.1.1	Add New Funding Account.....	1
2.1.2	Update Payment Percentage	1
2.2	TPD Accounts	3
2.2.1	Add New Funding Account.....	3
2.2.2	Update Payment Percentage	3

1 Introduction

This document describes in detail about the Multiple Funding Account feature.

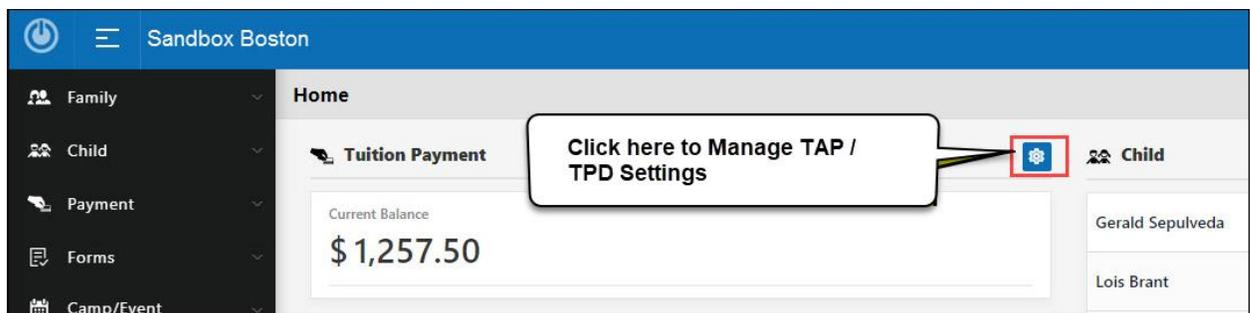
2 Multiple Funding Account for Payor

The parents (payor) can now create multiples funding accounts for online payment and set the percentage of payment between those accounts. This is applicable for both ACH and Card accounts.

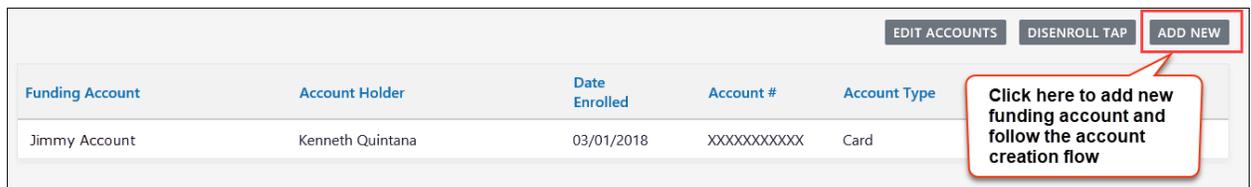
2.1 TAP Accounts

Below is the flow for the TAP accounts.

To access this, go to: Parent Portal → Manage TAP Settings.

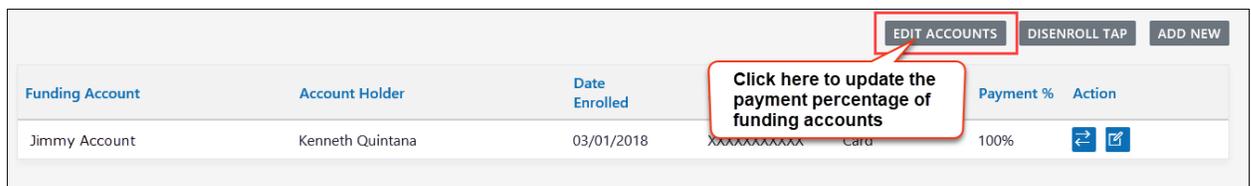


2.1.1 Add New Funding Account



Add New Funding Account

2.1.2 Update Payment Percentage



Manage Tuition Auto Pay (TAP) Page 1

Manage Tuition Auto Pay (TAP) Account

No.	Funding Account Name	Payment Type	Payment Percentage
1	Jimmy Account	Card	100%
2	CC Account		

Click Edit to set the payment percentage for the respective funding account

Manage Tuition Auto Pay (TAP) Page 2

Manage Tuition Auto Pay (TAP) Account

No.	Funding Account Name	Payment Type	Payment Percentage
1	Jimmy Account		100%
2	CC Account		0%

Update the payment percentage and click Save

Manage Tuition Auto Pay (TAP) Page 3

Please note that the total of payment percentage should always be 100%.

2.2 TPD Accounts

Below is the flow for the TPD accounts.

To access this, go to: Parent Portal → Manage Tuition Pay Direct (TPD)

The screenshot shows the 'Sandbox Boston' Parent Portal. On the left is a navigation menu with options: Family, Child, Payment, Forms, and Camp/Event. The main content area is titled 'Home' and 'Tuition Payment'. It displays a 'Current Balance' of '\$1,257.50'. On the right, there are child names: Gerald Sepulveda and Lois Brant. A callout box with a gear icon points to the 'Manage TAP / TPD Settings' link.

2.2.1 Add New Funding Account

The screenshot shows the 'Manage Tuition Pay Direct (TPD) Account' page. It lists available functions: 'RECURRING PAYMENT SCHEDULE', 'DISENROLL TPD', and 'ADD NEW'. Below is a table of existing funding accounts. A callout box points to the 'ADD NEW' button.

No.	Funding Account	Account Holder	Date Enrolled	Account #	Action
1	yodersec@beyonduniverse.in - ACH	John H. Yoder	08/30/2017	XXXXXX8965	[Edit] [Delete]
2	yodersec@beyonduniverse.in	John H. Yoder	11/15/2017	XXXXXX1111	Card 50% [Edit] [Delete]

Add New Funding Account

2.2.2 Update Payment Percentage

The screenshot shows the 'TPD - Manage Recurring Payment Schedule' page. It features a table of funding accounts and a section for the active recurring payment schedule. A callout box points to the 'UPDATE PAYMENT PERCENTAGE' button.

No.	Funding Account	Account Holder	Date Enrolled	Account #	Account	%	Action
1	yodersec@beyonduniverse.in - ACH	John H. Yoder	08/30/2017	XXXXXX8965			[Edit] [Delete]
2	yodersec@beyonduniverse.in	John H. Yoder	11/15/2017	XXXXXX1111	Card	50%	[Edit] [Delete]

Frequency	Recurring On	Start Date	End Date	Last Payment Date	Next Payment Date	Action
Monthly	15th	11/14/2017	11/30/2017	11/15/2017		[Edit] [Delete]

TPD – Manage Recurring Payment Schedule 1

TPD - Manage Recurring Payment Schedule

No.	Funding Account Name	Payment Type	Payment Percentage
1	yodersec@beyonduniverse.in - ACH	ACH	50%
2	yodersec@beyonduniverse.in	Card	

Click Edit to set the payment percentage for the respective funding account

TPD – Manage Recurring Payment Schedule 2

TPD - Manage Recurring Payment Schedule

No.	Funding Account Name	Payment Type	Payment Percentage
1	yodersec@beyonduniverse.in		50%
2	yodersec@beyonduniverse.in		50%

Update the payment percentage and click Save

TPD – Manage Recurring Payment Schedule 3