

## Dues & Billing configuration settings

Michael C. - 2021-02-23 - Dues & Billing

To ensure that your club's Dues and Billing Module is setup correctly, you will need to update the Dues & Billing **Configuration Settings**. This will allow you to enable the Online Payment Module, define your club's billing address, currency, as well as input tax information.

**Note:** With multiple payment accounts, the account that is active at the time of payment will be used to process the payment, regardless of which payment account was active when an invoice was generated.

1. To update your club's Dues and Billing Configuration Settings, you will need to login to your club's homepage and access the member's area.
2. Once logged in, click **Organization** in the blue navigation bar.
3. Then, click on **Dues & Billing** under Organization.
4. You will then be brought to the Dues and Billing home. Next, click on **Configuration Settings** on the left side of the page under the **Settings** section to view the Account Configuration page.
5. The **Billing Addresses** section will allow you to enter in your Club's billing address, specifying where you wish cheques to be mailed. You are also able to select the currency to be displayed on invoices.

## Account Configuration

Billing Addresses	
Address Line 1	2060 Winston Park Dr
Address Line 2	Suite 102
City	Oakville
State	ON
Zip/Postal Code	L6H 5R7
Country	Canada
Display Currency	US Dollar ▼

When creating new items apply amount

☒ To all members ☐ Do not apply

### Display Options

- ☒ Show Ex Member
- ☒ Show Honorary Member
- ☒ Payment Comment Required

6. By default, when creating a new item on a bill, all members will be automatically selected for the item and any members who will not be charged this item will need to be de-selected. To change this so that no members are selected by default when the item is created, you can select the 'Do not apply' option.

## Account Configuration

Billing Addresses	
Address Line 1	2060 Winston Park Dr
Address Line 2	Suite 102
City	Oakville
State	ON
Zip/Postal Code	L6H 5R7
Country	Canada
Display Currency	US Dollar ▼

When creating new items apply amount

☒ To all members ☐ Do not apply

### Display Options

- ☒ Show Ex Member
- ☒ Show Honorary Member
- ☒ Payment Comment Required

7. The **Display Options** allow you to hide or show Ex Members and Honorary Members from the list of members available to be selected for an item on a bill. You can also select whether or not a comment is required for payment.

## Account Configuration

### Billing Addresses

Address Line 1	2060 Winston Park Dr
Address Line 2	Suite 102
City	Oakville
State	ON
Zip/Postal Code	L6H 5R7
Country	Canada
Display Currency	US Dollar ▼

When creating new items apply amount

☒ To all members ☐ Do not apply

### Display Options

- ☒ Show Ex Member
- ☒ Show Honorary Member
- ☒ Payment Comment Required

8. **Tax Rates** will allow you to set tax rates for your area. These rates will be included on member's bills when they are generated.

### Display Options

- ☒ Show Ex Member
- ☒ Show Honorary Member
- ☒ Payment Comment Required

### Tax Rates

Default GST/Fed Tax %	0
Default PST/State Tax %	0

### Select Payment Method

Please select one of following payment methods

- ☐ No payment account specified
- ☐ BeanStream Payment Solution: Bambora Test Merchant Account (200610000)
- ☐ Payment Express: Payment Express Test Account (ClubRunnerPxP\_Dev)
- ☒ Sage Payment Solutions: Paya Test Payment Account (978985210861)

[Cancel](#) [Save](#)

9. If your Club has signed up with one of our online payment vendors, they will appear under the **Select Payment Method** section. Here, you can select the payment vendor to facilitate your member's online bill payments. [Click here for more information on Online Payment and our Online Payment Vendors.](#)

**Display Options**

☒ Show Ex Member

☒ Show Honorary Member

☒ Payment Comment Required

**Tax Rates**

Default GST/Fed Tax %

Default PST/State Tax %

**Select Payment Method**

Please select one of following payment methods

☐ No payment account specified

☐ BeanStream Payment Solution: Bambora Test Merchant Account (200610000)

☐ Payment Express: Payment Express Test Account (ClubRunnerPxP\_Dev)

☒ Sage Payment Solutions: Paya Test Payment Account (978985210861)

[Cancel](#) [Save](#)

10. Once you are done making changes to your Dues & Billing Account Configuration, clicking on the **Save** button at the bottom of the page will save your changes.

**Display Options**

☒ Show Ex Member

☒ Show Honorary Member

☒ Payment Comment Required

**Tax Rates**

Default GST/Fed Tax %

Default PST/State Tax %

**Select Payment Method**

Please select one of following payment methods

☐ No payment account specified

☐ BeanStream Payment Solution: Bambora Test Merchant Account (200610000)

☐ Payment Express: Payment Express Test Account (ClubRunnerPxP\_Dev)

☒ Sage Payment Solutions: Paya Test Payment Account (978985210861)

[Cancel](#) [Save](#)

## Related Content

- [VIDEO: Attendance + Dues and Billing](#)
- [VIDEO: Dues and Billing with Zach W.](#)
- [Dues & Billing guide](#)
- [How do I print/email invoices?](#)
- [How do I adjust the amount a member owes?](#)
- [How do I change the club billing address?](#)
- [How do I see the Dues & Billing reports?](#)
- [How do I specify a preferred email address for dues & billing?](#)
- [How do I create a new bill?](#)