

ClubRunner

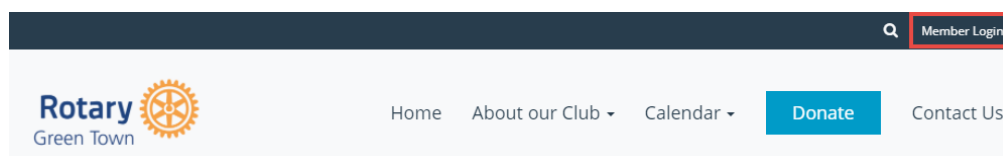
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How do I adjust the amount a member owes?

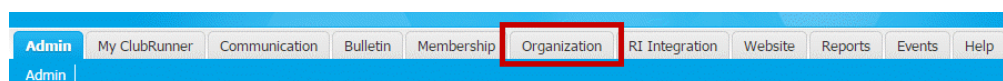
Michael C. - 2021-02-23 - Dues & Billing

Using the **Dues and Billing** function of ClubRunner, you can manage the accounts of your individual members. You can track and adjust both payments and debits, and keep clear records of each transaction.

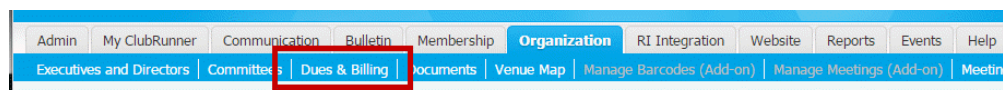
1. To adjust the amount a member owes, you must go to your club homepage and log in. Then, click on **Member Area** on the top right.



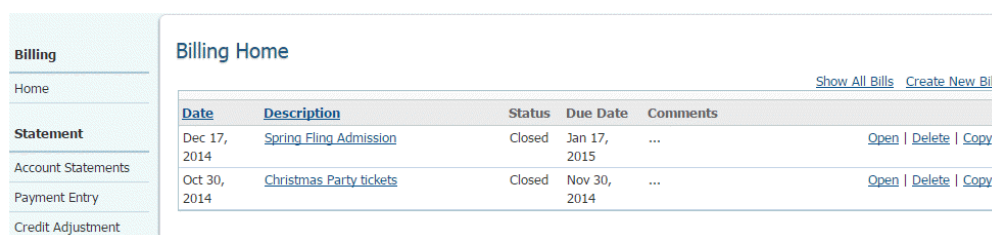
2. Along the top of the screen you will see several tabs. Click on **Organization**.



3. Next, click **Dues and Billing**.

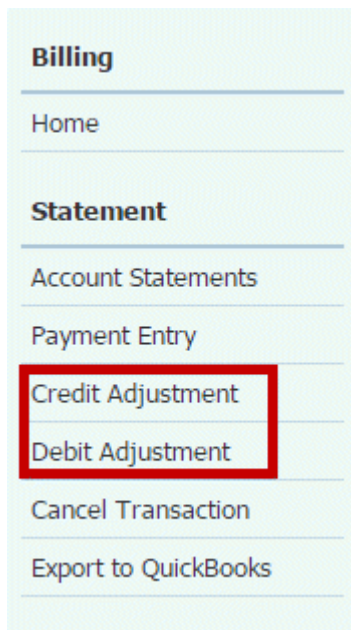


4. You are now on the **Billing Home** page. Here, you can view and edit the details of current billings and member invoices.

A screenshot of the Billing Home page. On the left is a sidebar with links: Billing, Home, Statement, Account Statements, Payment Entry, and Credit Adjustment. The main content area is titled "Billing Home" and contains a table of bills. At the top right of the table are links for "Show All Bills" and "Create New Bill".

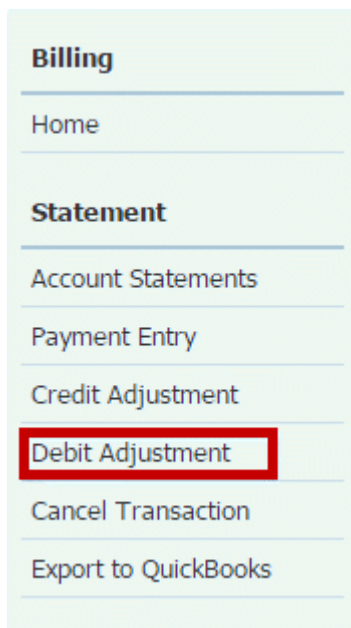
Date	Description	Status	Due Date	Comments	
Dec 17, 2014	Spring Fling Admission	Closed	Jan 17, 2015	...	Open Delete Copy
Oct 30, 2014	Christmas Party tickets	Closed	Nov 30, 2014	...	Open Delete Copy

5. On the left side of the screen you will see links to a number of options. In order to adjust the amount owed by a member, click on **Credit Adjustment** or **Debit Adjustment**, as appropriate. Credit adjustment will credit money toward the member, reflecting payments made by the member or to the member by the club. Use Debit adjustment to adjust the amount owed by the member.



Debit Adjustment

1. Click **Debit Adjustment** to adjust the amount owed by the member.



2. On the **Admin Debit Adjustment** page, use the drop menu to select an active member whose account you wish to view. Click **Show All Types** if you wish to choose an inactive member or other user.

Add a Debit Adjustment

Select Member Show All Types

Comment

Amount (\$)
Enter a positive number that will act as a charge to increase the balance owed.

Transaction Date

3. Use the **Comment** field to record details of the debit adjustment.

Add a Debit Adjustment

Select Member Show All Types

Comment

Amount (\$)
Enter a positive number that will act as a charge to increase the balance owed.

Transaction Date

4. Use the **Amount(\$)** field to enter the amount by which you wish to adjustment the member's debit. Use the **Transaction Date** drop down to set the date the transaction took place.

Note: You may enter a negative sum in the **Amount(\$)** field to reduce the amount owing.

Add a Debit Adjustment

Select Member Show All Types

Account Balance \$10.00 Owed to Member [View Statement](#)

Comment

Amount (\$)
Enter a positive number that will act as a charge to increase the balance owed.

Transaction Date

5. When you have finished, click **Post** to finalize the transaction, and **Cancel** to discard the information.

Add a Debit Adjustment

Select Member Show All Types

Account Balance \$35.00 Owed to Member [View Statement](#)

Comment

Amount (\$)
Enter a positive number that will act as a charge to increase the balance owed.

Transaction Date

- You will now be taken to the **Billing Transactions** page, where you can view a summary of this member's transactions, including your recent debit adjustment.

Billing Transactions

Sue Baker
You have an outstanding balance of \$28.00

[All Transactions](#) | [Print Report](#)

Date	Trans Type	Description	Due Date	Charge	Payment
Oct 30, 2014	Invoice	Billing Invoice: Christmas Party tickets (Invoice No:3)	Nov 30, 2014	\$10.00	
Dec 17, 2014	Invoice	Billing Invoice: Spring Fling Admission (Invoice No:1)	Jan 17, 2015	\$8.00	
Dec 18, 2014	Debit Note	Debit adjustment		\$10.00	
Total:				\$28.00	\$0.00
Account Balance					\$28.00

Credit Adjustment

- To grant a credit to a member, click on **Credit Adjustment** on the left.

Statement

Account Statements

Payment Entry

Debit Adjustment

Cancel Transaction

- Simply fill in the fields as described above in the **Debit Adjustment** procedure.

Add a Credit Adjustment

Select Member Show All Types

Account Balance \$35.00 Owed to Member [View Statement](#)

Comment

Amount (\$)
Enter a positive number that will act as a payment to decrease the balance owed.

Transaction Date

3. As before, your account adjustment now appears on the member's **Billing Transactions** page.

Billing Transactions

Sue Baker

You have an outstanding balance of \$18.00

[All Transactions](#) | [Print Report](#)

Date	Trans Type	Description	Due Date	Charge	Payment
Oct 30, 2014	Invoice	Billing Invoice: Christmas Party tickets (Invoice No:3)	Nov 30, 2014	\$10.00	
Dec 17, 2014	Invoice	Billing Invoice: Spring Fling Admission (Invoice No:1)	Jan 17, 2015	\$8.00	
Dec 18, 2014	Debit Note	Debit adjustment		\$10.00	
Dec 18, 2014	Credit Note	Credit adjustment			\$10.00
Total:				\$28.00	\$10.00
Account Balance					\$18.00

Related Content

- [How do I enter payments in Dues & Billing?](#)
- [How do I track payments made by members?](#)
- [How do I send statements to members?](#)
- [How do I view member account statements?](#)
- [How do I cancel transactions within Dues & Billing?](#)
- [Dues & Billing configuration settings](#)
- [How do I create a new bill?](#)