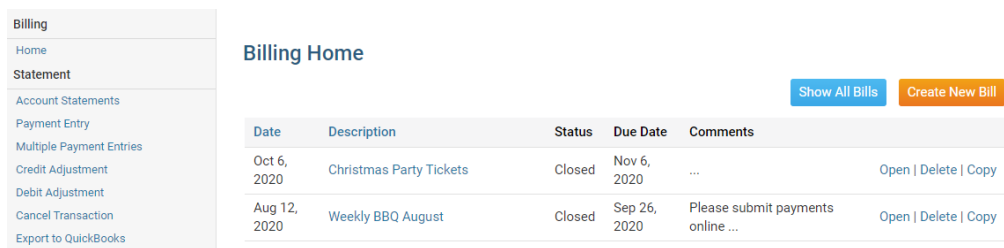# ClubRunner

How do I create a new bill?

Michael C. - 2023-04-10 - Dues & Billing

Using the **Dues and Billing** function of ClubRunner, you can create new bills and invoices, and track payments made by your members.
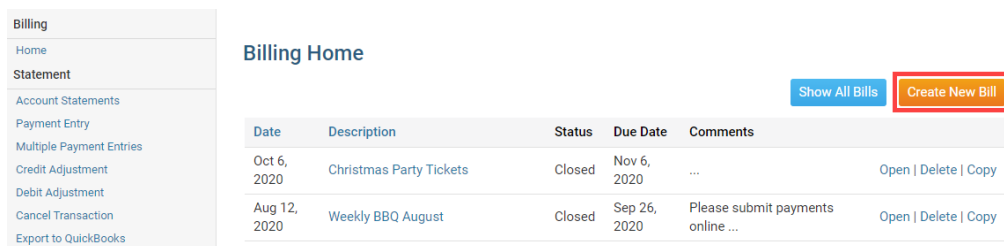
1. To create a new bill, you must go to your club homepage and log in. Then, click on **Member Area** on the top right.

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. You can also view and create new bills.

5. To make a new bill, click on the **Create New Bill** link at the top right of the **Billing Home** field.

6. You can now use the fields provided to enter the details of your new bill. Give the bill a distinctive title in the field marked **Description.**

7. Next, use the calendar icon under the **Due Date** heading to set the date on which the bill falls due.

8. You now have the option to enter some comments about nature of the bill in the Comments field.

9. Click **Save** to create the bill, or **Cancel** to discard it.

Billing Home

				Show All Bills	Create New Bill

Date	Description	Status	Due Date	Comments	
	New Years Gathering Tic		Nov 23 2020 🗓		Save | Cancel
Comments:	Virtual Party Ticket includes delivered food and drinks to your profile address. Proceeds go to the foundation.				
Oct 6, 2020	Christmas Party Tickets	Closed	Nov 6, 2020	...	Open | Delete | Copy

10. After you click **Save**, it takes you to the **Batch Main** page. The **Add additional item** link lets you start adding charges. Click on **Add additional item** to create a charge.

Batch Main

New Years Gathering Tickets
Created: Oct 23 2020
Owner: Edward Chu
Status: Open
Due Date: Nov 23 2020
Comments: Virtual Party Ticket includes delivered food and drinks to your profile address. Proceeds go to the foundation.

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1) Specify charges and select recipients

Specify the invoice items and select the members that apply for each charge.

Add additional item

Qty	Description	Member Count	Total
	No items for this bill.		

2) Review

You can preview the individual invoices.

Billing Roster

3) Generate Invoices

Once you generate the invoices, you will be able to print and email them to members.
Please note that once you generate the invoices, you will **NOT** be able to modify the invoices.

Generate Invoices

11. On the **Add Batch Information** page, you can add an invoice item to the bill. Use the fields provided to set the details and price of the invoice item.

Add Batch Information

Invoice Item	
Qty:	1
Invoice Detail:	Virtual Gathering Ticket
Unit Price:	15.00
Amount:	$15.00

<button>Cancel <button>Save

12. Now, scroll down. Under the header **Select Members**, you may select those members to whom you wish to bill. By default, all active members are selected. You can use the check boxes next to each member's name to select specific members. You may use the **QTY** field to enter the number of items each member is to be invoiced for.

Select Members

Active   Unselect All Active Members

	Sort By First Name	Qty	Unit Price	Amount
☑	Applegate, John	1	15.00	$15.00
☑	Baker, Sue	2	15.00	$30.00
☑	Brackett, Leigh	1	15.00	$15.00
☐	Chu, Edward	0	$0.00	$0.00
☑	Dean, John	4	15.00	$60.00
☐	Dewy, Mickey	0	$0.00	$0.00
☑	Draper, Judith	3	15.00	$45.00
☑	Hampton, Charles	1	15.00	$15.00

13. After selecting active members, you may also choose to invoice **Ex-Members, additional Active Members types** and **Honorary Members**, if you have any listed in your database.

	Honorary	Select All Honorary Members			
	Sort By First Name		Qty	Unit Price	Amount
☑	Davis, Clare		1	15.00	$15.00

Active - Satellite   Select All Active - Satellite Members

No member for this member type.

	Active - Corporate	Select All Active - Corporate Members			
	Sort By First Name		Qty	Unit Price	Amount
☑	Corprel, John		1	15.00	$15.00

	Ex Member	Select All Ex Members			
	Sort By First Name		Qty	Unit Price	Amount
☑	Barnes, Bill		1	15.00	$15.00
☐	Dabinski, Lana		0	0.00	$0.00

14. When you have completed entering your information, click **Save** near the top or bottom. If you wish to discard the invoice items, click **Cancel.**

Add Batch Information

Invoice Item	
Qty:	1
Invoice Detail:	Virtual Gathering Ticket
Unit Price:	15.00
Amount:	$15.00

Cancel   Save

15. You are now returned to the Batch Main page, where you can view details about your new bill and invoice items. You can view the batch summary by clicking on **Billing Roster**.

2) Review

You can preview the individual invoices.

Billing Roster

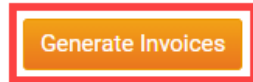16. When you have completed creating the invoice click on the **Generate Invoices** button to be able to print and email the invoices.

    *Note: Once you click on the **Generate Invoices** button you will **NOT** be able to modify the invoices.*

    3) Generate Invoices

    Once you generate the invoices, you will be able to print and email them to members.
    Please note that once you generate the invoices, you will **NOT** be able to modify the invoices.

    Generate Invoices

17. To email the invoices click **View individual Invoices**.

    4) Print/Email Invoices

    View Individual Invoices

18. You are now viewing an Invoice Summary Report. This report lists all members who could receive the invoice. The checkmark box beside the name of each member will be emailed the invoice. If you do not want to send the invoice to a member click on the checkmark beside the member's name. Click **Email Selected Invoices** to send the invoices to the members.

    Note: If the member has their work address set as preferred address in their member profile, it will display the name of the member, the company name and work address on the invoice. To learn more read the Member Profile article.

Invoice Summary Report

New Years Gathering Tickets
Created: Oct 23 2020
Owner: Edward Chu
Status: Closed
Due Date: Nov 23 2020
Comments: Virtual Party Ticket includes delivered food and drinks to your profile address. Proceeds go to the foundation.

To email your invoices individually, click on the "Email" link beside each member.
Alternatively, click on "Email Selected Invoices" button.

Download Selected Invoices (PDF Format)   Email Selected Invoices

Active (Sort By First Name)   Select All

☑ Applegate, John   View/Print | Email

Description	Qty	Unit Price	Amount
Virtual Gathering Ticket	1	$15.00	$15.00
		Total:	$15.00

☑ Baker, Sue   View/Print | Email

Description	Qty	Unit Price	Amount
Virtual Gathering Ticket	2	$15.00	$30.00
		Total:	$30.00

19. This will take you in the Email Archive. You can click on **View** to view the invoice that was sent. Or you can click on **Stats** to see the status of the emailed invoice to make sure the member received it. It may take several minutes to an hour to update the stats. To learn more please read the Email Stats article and to go step 6.

Dues & Billing Email Archive

Show All Emails   **Show My Emails Only**

Filter records: [   ]

Status ▾	Subject ▾	Owner ▾	Actions
Queued for sending	Invoice: New Years Gathering Tickets	Edward Chu	▾
Sent on Jun 08, 2017 at 2:48 PM	Invoice		

🔍 View
📈 Stats

Showing all 2 records

20. To get back into the Dues & Billing Main, click on **Back to Dues and Billing** at the top of the left menu.

Billing
Back to Dues and Billing

Related Content

- VIDEO: Attendance + Dues and Billing

- [VIDEO: Dues and Billing with Zach W.](#)
- [How do I setup online credit card payment options?](#)
- [Dues & Billing guide](#)
- [How do I resend invoices to selected members?](#)
- [How do I adjust the amount a member owes?](#)
- [How do I print member invoices?](#)
- [How do I view the Dues & Billing email archive?](#)
- [How do I specify a preferred email address for dues & billing?](#)
- [Dues & Billing configuration settings](#)
- [How can I prevent an ex-member from receiving invoices?](#)