

# ClubRunner

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## How do I create a new bill?

Michael C. - 2021-02-23 - [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.

The screenshot shows the 'Billing Home' page. On the left is a sidebar menu with options: Billing, Home, Statement, Account Statements, Payment Entry, Multiple Payment Entries, Credit Adjustment, Debit Adjustment, Cancel Transaction, and Export to QuickBooks. The main content area has a 'Billing Home' title and two buttons: 'Show All Bills' and 'Create New Bill'. Below is a table with columns: Date, Description, Status, Due Date, and Comments. The table contains two rows: one for 'Christmas Party Tickets' (Oct 6, 2020, Closed, Due Nov 6, 2020) and one for 'Weekly BBQ August' (Aug 12, 2020, Closed, Due Sep 26, 2020). Each row has 'Open | Delete | Copy' links.

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

This screenshot is identical to the previous one, but the 'Create New Bill' button is highlighted with a red border to indicate it should be clicked.

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**.

### Billing Home

This screenshot shows the 'Create New Bill' form. The 'Description' field is highlighted with a red box and contains the text 'New Years Gathering Tic'. The 'Due Date' field contains 'Nov 23 2020'. Below the form is a 'Comments' field with the text: 'Virtual Party Ticket includes delivered food and drinks to your profile address. Proceeds go to the foundation.' At the bottom, there are 'Save | Cancel' buttons and a table row for 'Christmas Party Tickets' (Oct 6, 2020, Closed, Due Nov 6, 2020).

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

### Billing Home

[Show All Bills](#)
[Create New Bill](#)

Date	Description	Status	Due Date	Comments
	New Years Gathering Tic		Nov 23 2020	Comments: Virtual Party Ticket includes delivered food and drinks to your profile address. Proceeds go to the foundation. <div style="text-align: right;"> <a href="#">Save</a>   <a href="#">Cancel</a> </div>
Oct 6, 2020	Christmas Party Tickets	Closed		<a href="#">Open</a>   <a href="#">Delete</a>   <a href="#">Copy</a>
Aug 12, 2020	Weekly BBQ August	Closed		Payments <a href="#">Open</a>   <a href="#">Delete</a>   <a href="#">Copy</a>

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

### Billing Home

[Show All Bills](#)
[Create New Bill](#)

Date	Description	Status	Due Date	Comments
	New Years Gathering Tic		Nov 23 2020	Comments: Virtual Party Ticket includes delivered food and drinks to your profile address. Proceeds go to the foundation. <div style="text-align: right;"> <a href="#">Save</a>   <a href="#">Cancel</a> </div>
Oct 6, 2020	Christmas Party Tickets	Closed	Nov 6, 2020	<a href="#">Open</a>   <a href="#">Delete</a>   <a href="#">Copy</a>

- 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	Comments: Virtual Party Ticket includes delivered food and drinks to your profile address. Proceeds go to the foundation. <div style="text-align: right;"> <a href="#">Save</a>   <a href="#">Cancel</a> </div>
Oct 6, 2020	Christmas Party Tickets	Closed	Nov 6, 2020	<a href="#">Open</a>   <a href="#">Delete</a>   <a href="#">Copy</a>

- 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.

#### 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:	<input type="text" value="1"/>
Invoice Detail:	<input type="text" value="Virtual Gathering Ticket"/>
Unit Price:	<input type="text" value="15.00"/>
Amount:	\$15.00

Cancel

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
<input checked="" type="checkbox"/>	Applegate, John	1	15.00	\$15.00
<input checked="" type="checkbox"/>	Baker, Sue	2	15.00	\$30.00
<input checked="" type="checkbox"/>	Brackett, Leigh	1	15.00	\$15.00
<input type="checkbox"/>	Chu, Edward	0	\$0.00	\$0.00
<input checked="" type="checkbox"/>	Dean, John	4	15.00	\$60.00
<input type="checkbox"/>	Dewy, Mickey	0	\$0.00	\$0.00
<input checked="" type="checkbox"/>	Draper, Judith	3	15.00	\$45.00
<input checked="" type="checkbox"/>	Hampton, Charles	1	15.00	\$15.00


13. After selecting active members, you may also choose to invoice **Ex-Members, Other 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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	Corprel, John	1	15.00	\$15.00

 Ex Member [Select All Ex Members](#)

	Sort By First Name	Qty	Unit Price	Amount
<input checked="" type="checkbox"/>	Barnes, Bill	1	15.00	\$15.00
<input type="checkbox"/>	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:	<input type="text" value="1"/>
Invoice Detail:	<input type="text" value="Virtual Gathering Ticket"/>
Unit Price:	<input type="text" value="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		<a href="#">View</a> <a href="#">Stats</a>

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

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

- [VIDEO: Attendance + Dues and Billing](#)