ClubRunner

How do I create a new bill?

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

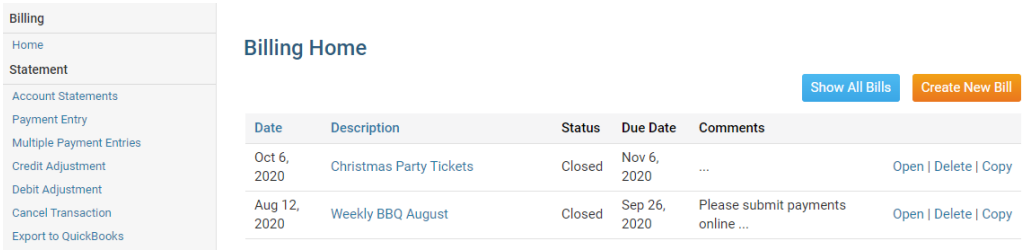
Using the **Dues and Billing** function of ClubRunner, you can create new bills and invoices, and track payments made by your members.

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.

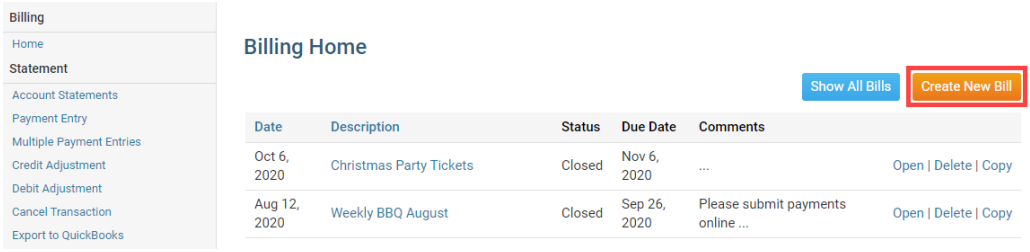
2. Along the top of the screen you will see several tabs. Click on **Organization.**

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

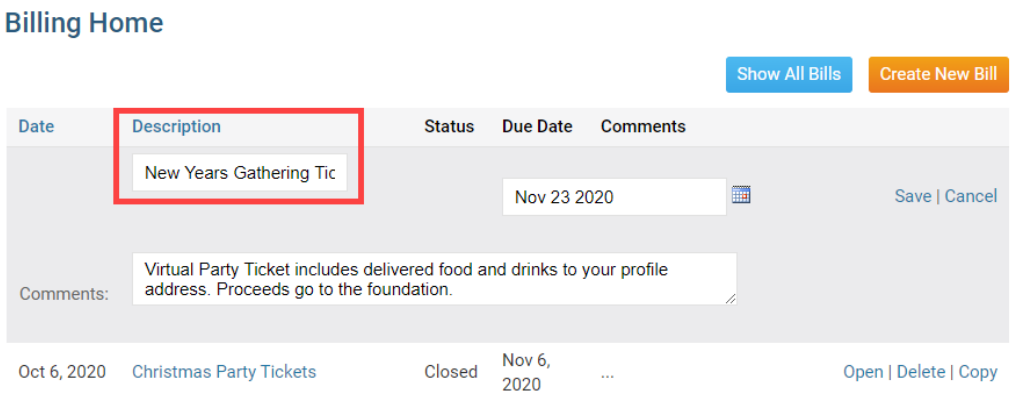
4. You are now on the **Billing Home** page. Here, you can view and edit the details of current billings and member invoices. You can also view and create new bills.



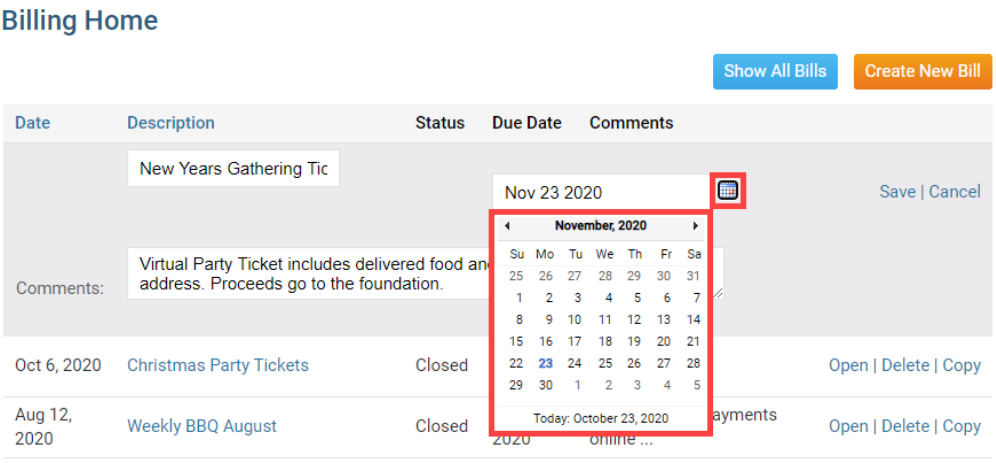
5. To make a new bill, click on the **Create New Bill** link at the top right of the **Billing Home** field.



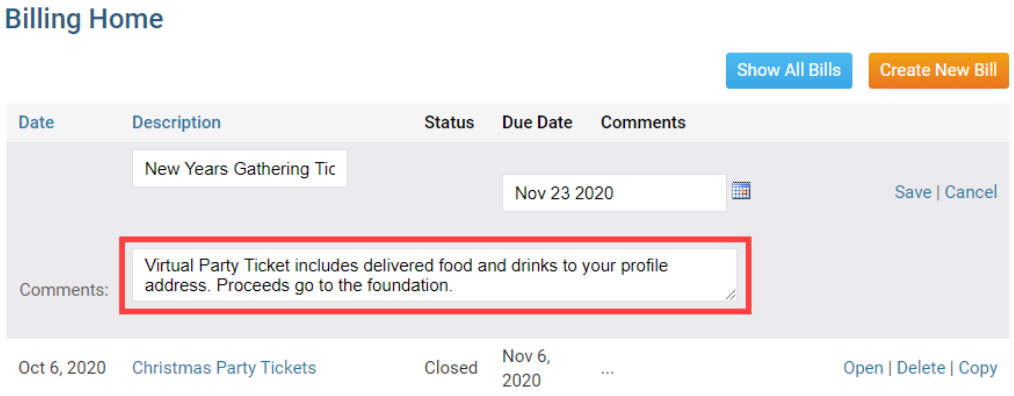
6. You can now use the fields provided to enter the details of your new bill. Give the bill a distinctive title in the field marked **Description.**



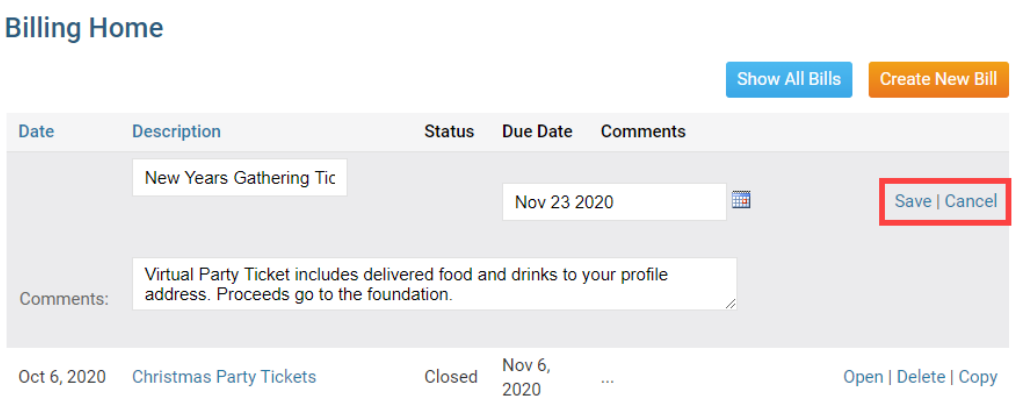
7. Next, use the calendar icon under the **Due Date** heading to set the date on which the bill falls due.



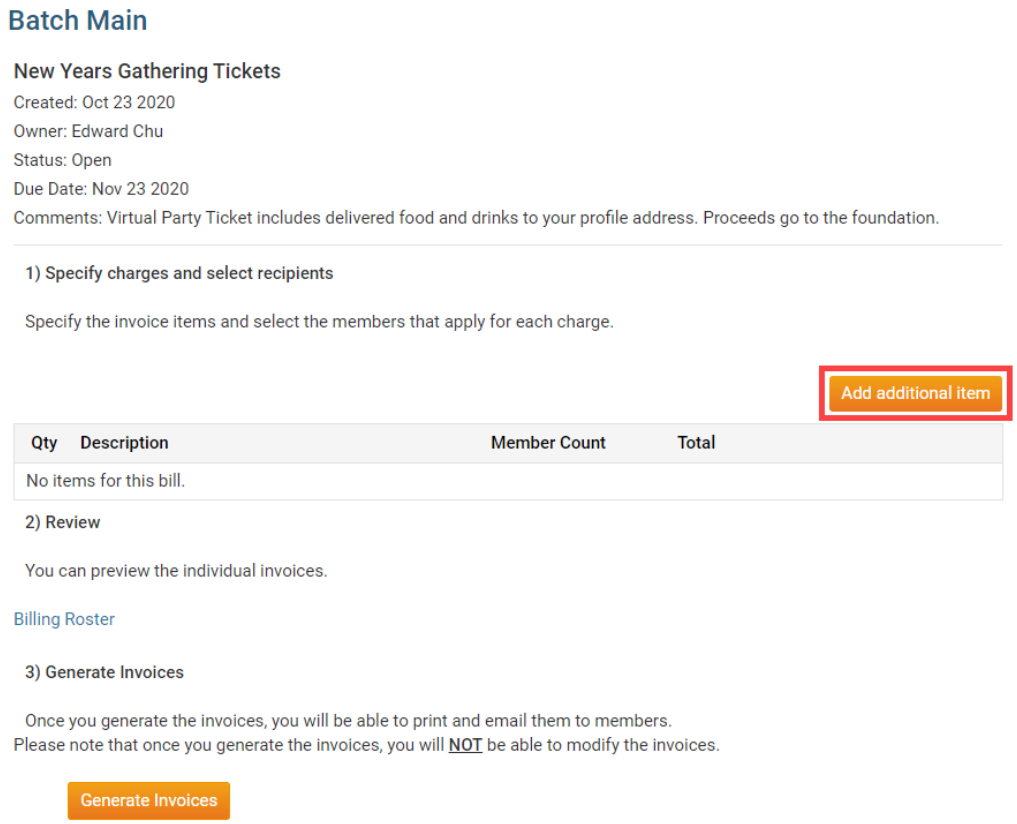
8. You now have the option to enter some comments about nature of the bill in the Comments field.



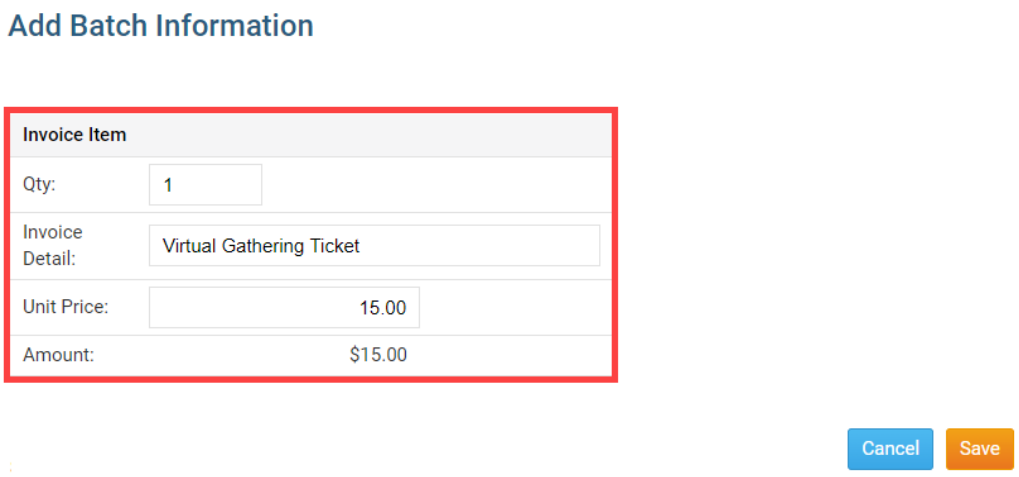
9. Click **Save** to create the bill, or **Cancel** to discard it.



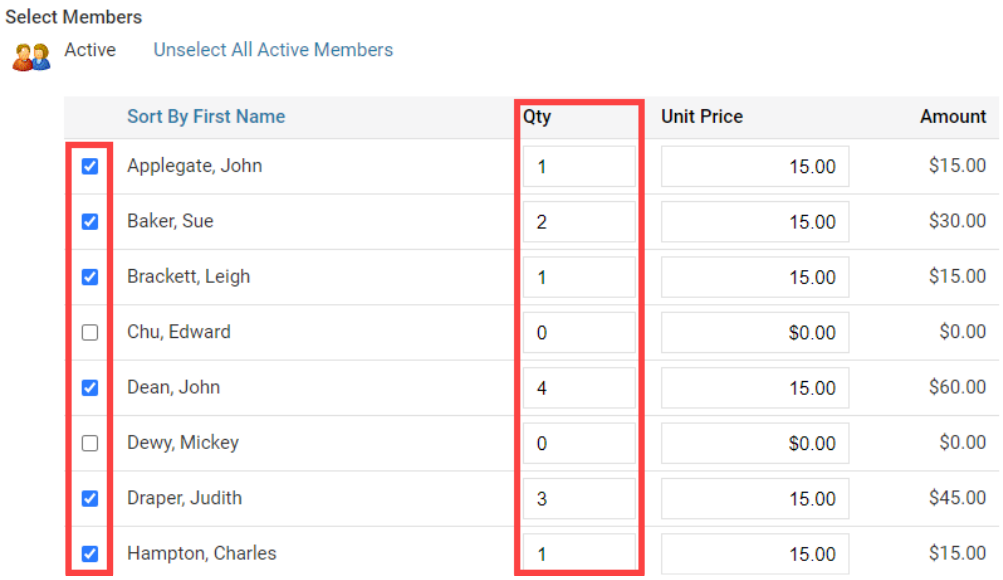
10. After you click **Save**, it takes you to the **Batch Main** page. The **Add additional item** link lets you start adding charges. Click on **Add additional item** to create a charge.



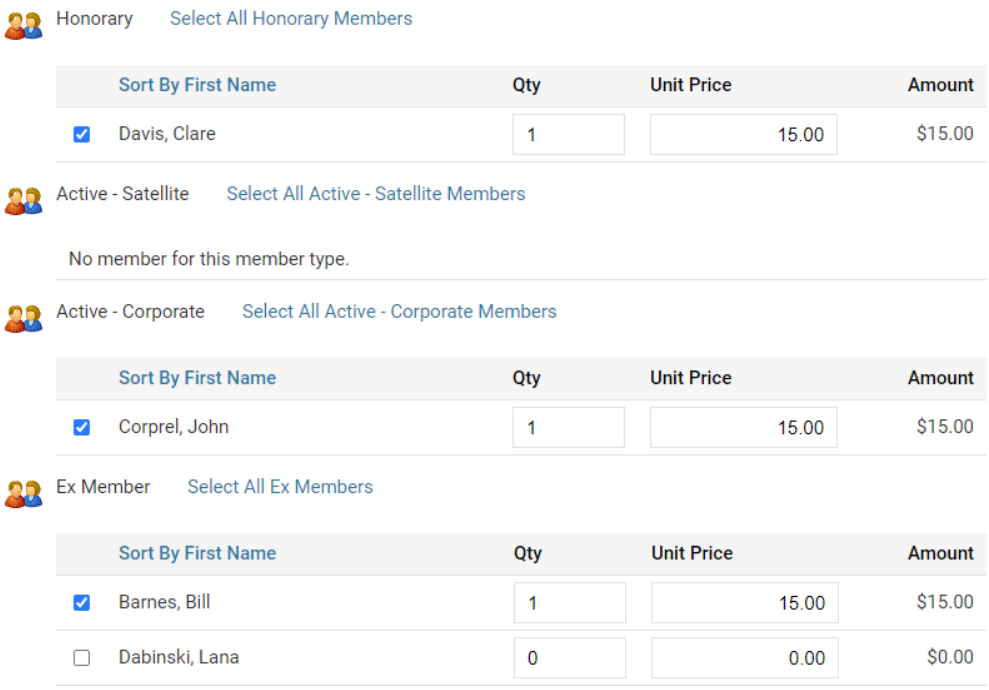
11. On the **Add Batch Information** page, you can add an invoice item to the bill. Use the fields provided to set the details and price of the invoice item.



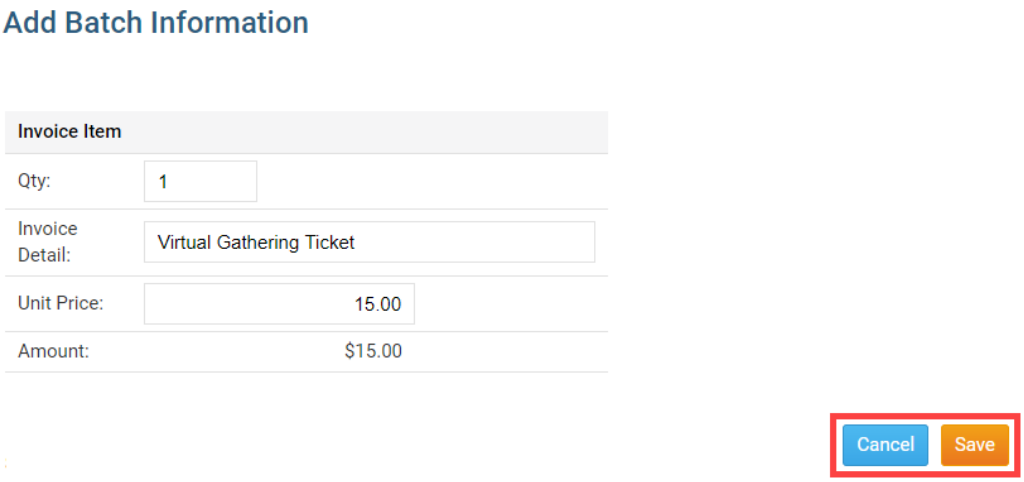
12. Now, scroll down. Under the header **Select Members**, you may select those members to whom you wish to bill. By default, all active members are selected. You can use the check boxes next to each member's name to select specific members. You may use the **QTY** field to enter the number of items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



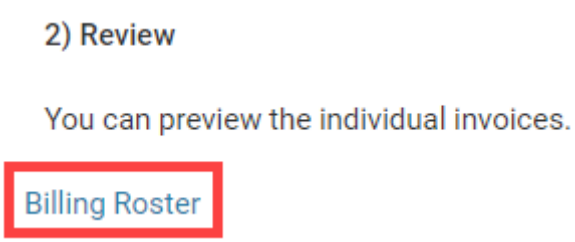
13. After selecting active members, you may also choose to invoice **Ex-Members, additional Active Members types** and **Honorary Members**, if you have any listed in your database.



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.**



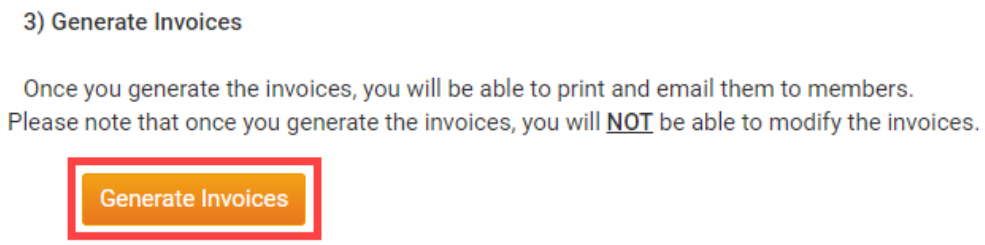
15. You are now returned to the Batch Main page, where you can view details about your new bill and invoice items. You can view the batch summary by clicking on **Billing Roster**.



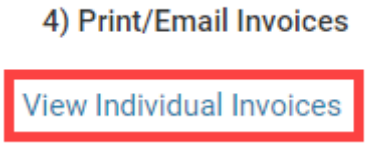
16. When you have completed creating the invoice click on the **Generate Invoices** button to be able to

print and email the invoices.

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

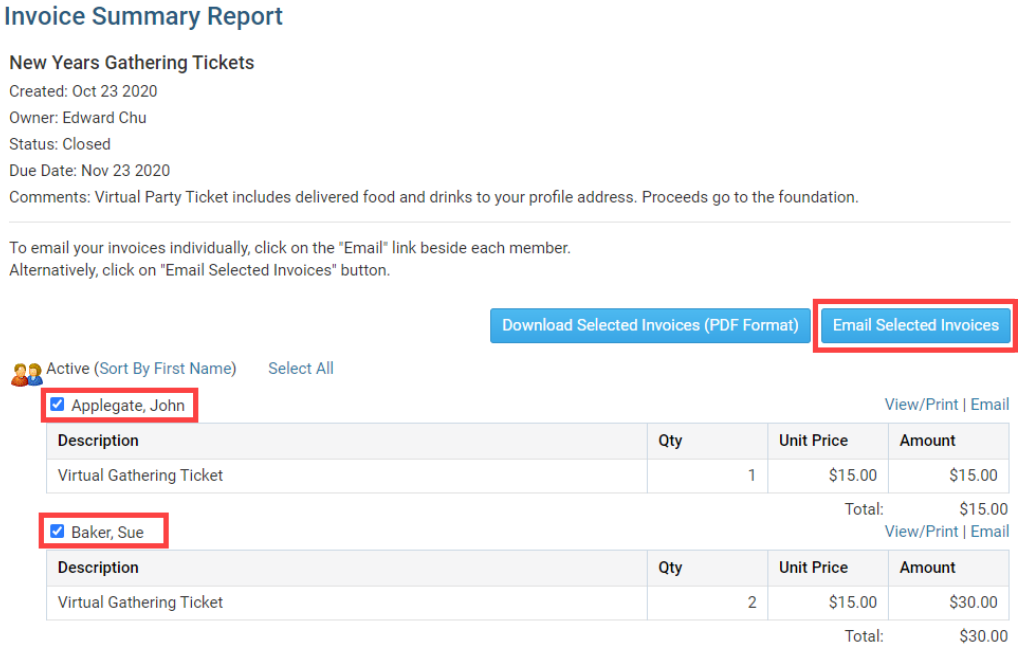


17. To email the invoices click **View individual Invoices**.



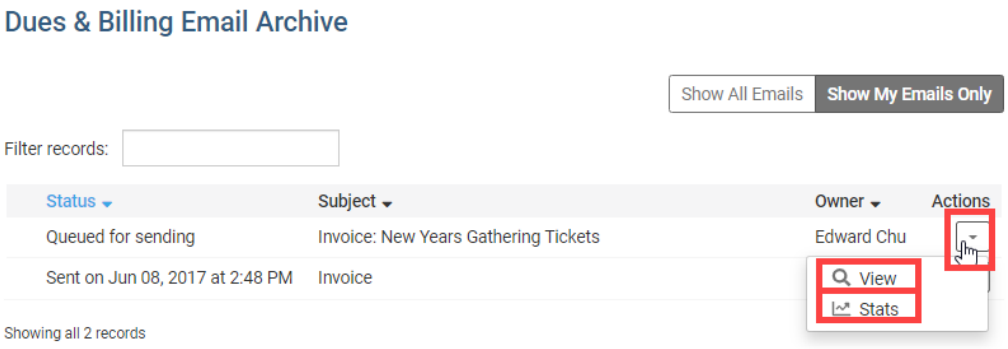
18. You are now viewing an Invoice Summary Report. This report lists all members who could receive the invoice. The checkmark box beside the name of each member will be emailed the invoice. If you do not want to send the invoice to a member click on the checkmark beside the member's name. Click **Email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



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.



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



Related Content

- 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?