ClubRunner

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How do I enter payments in Dues & Billing?

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

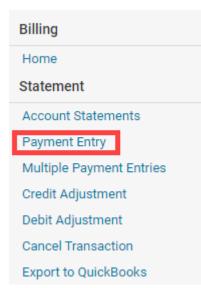
You can make a manual entry payment entry for a club member at any time, using the Dues & Billing feature.

Note: If you need to enter multiple payments at the same time, please see this article: <u>How do I enter</u> <u>Multiple Payments</u>

- 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.

Billing Home Statement Account Statements	Billing H	lome			Show All	Bills Create New Bill
Payment Entry	Date	Description	Status	Due Date	Comments	
Multiple Payment Entries Credit Adjustment Debit Adjustment	Oct 23, 2020	New Years Gathering Tickets	Closed	Nov 23, 2020	Virtual Party Ticket includes	Open Delete Copy
Cancel Transaction Export to QuickBooks	Oct 6, 2020	Christmas Party Tickets	Closed	Nov 6, 2020		Open Delete Copy
Settings Configuration Settings	Aug 12, 2020	Weekly BBQ August	Closed	Sep 26, 2020	Please submit payments online	Open Delete Copy

5. On the left side of the screen, under the heading Statement, click on Payment Entry.



6. You are now on the **Manual Payment Entry** screen. Select the appropriate member from the dropdown menu. Checkmark **Show All Types** to be able to select inactive members and other users.

Add a Manua	l Payment	
Select Member	Select Member 🗸 🗆 Show All Ty	/pes
Comment	Payment	
	h	4
Amount (\$)	0.00	
	Enter a positive number that will be applied a	as a paj
Transaction Date	Oct 29, 2020	

Cancel Post

7. Next, enter details of the payment.

Add a Manual Payment

Select Member	Davis, Clare	✓ □ Show	All Types
Account Balance	\$68.00 Owed to Club	iew Statement	t
Comment	Payment to New Years Celebration Party		arty
Amount (\$)	30.00		
	Enter a positive number	that will be app	plied as a payment against the Account Balance.
Transaction Date	Oct 29, 2020		

Cancel Post

8. Enter the payment amount and date of payment.

Note: The amount must be entered as a positive number.

Add a Manual Payment

Select Member	Davis, Clare 🗸 🗆 Show All Types
Account Balance	\$68.00 Owed to Club View Statement
Comment	Payment to New Years Celebration Party
Amount (\$)	30.00 Enter a positive number that will be applied as a payment against the Account Balance.
Transaction Date	Oct 29, 2020



9. Then. click **Post** to enter the payment or **Cancel** to discard it.

Add a Manual	Payment			
Select Member	Davis, Clare 🗸 🗆 Show All Types			
Account Balance	\$68.00 Owed to Club View Statement			
Comment	Payment to New Years Celebration Party			
Amount (\$)	30.00			
	Enter a positive number that will be applied as a payment against the Account Balance.			
Transaction Date	Oct 29, 2020			



10. You may then review the details of the payment on the Member's account statement and billing transactions page.

Billing Transactions

Clare Davis

You have an outstanding balance of \$38.00 CAD Statement last emailed on Apr 22, 2020

				Send Statement by Email	
				All Transactions	Print Report
Date	Trans Type	Description	Due Date	Charge	Payment
Oct 29, 2020	Payment	Payment to New Years Celebration Party			\$30.00
Oct 23, 2020	Invoice	Billing Invoice: New Years Gathering Tickets (Invoice No:216)	Nov 23, 2020	\$15.00	
Jul 1, 2020	Balance Forward	Previous Balance		\$53.00	
			Total:	\$68.00	\$30.00
			Ac	Account Balance	

Related Content

- How do I adjust the amount a member owes?
- <u>How do I view member account statements?</u>
- How do I cancel transactions within Dues & Billing?
- How do I enter multiple payments for Dues & Billing?