ClubRunner

Help Articles > Club Help > Club - Administration Guide > Dues & Billing > How do I see the Dues & Billing reports?

How do I see the Dues & Billing reports?

Michael C. - 2022-09-27 - Dues & Billing

There are two reports in the Dues & Billing. **Debits and Credits Report** to see the total balance of your members and **Monthly Balance Report** to see the member's balances by month. Please read below for the steps on how to get to these reports.

 First, you would have to login to ClubRunner. To do so go to your Club's website, and then click on **Member Login** at the top right.



2. Once you entered your login information and logged in it will take you back to your home page. At the top right click **Member Area**.

			۹	Edward Chu	Member Area	Logout
Rotary	Home	About our Club -	Calendar -	Don	ate Co	ntact Us

 After that click on the Organization tab on the grey menu bar, and then click the Dues & Billing link.

Admin	My ClubRunner	Communica	ation	Bulletin	Contacts (E	Beta)	Memt	pership	Organization
Executive	es and Directors	Committees	Dues	& Billing	Documents	Venu	е Мар	Manage	e Barcodes (Add-or

4. This will take you to the Dues & Billing page. On the left hand side you will see the **Reports**.

Billing

Home

Statement

Account Statements

Payment Entry

Credit Adjustment

Debit Adjustment

Cancel Transaction

Export to QuickBooks

Settings

Configuration Settings

Reports
Debits and Credits Report
Monthly Balance Report
Email Archive

5. Click on **Debits and Credits Report** to see the total balance of your members.



6. This will take you to the Member Debits and Credits Report. From here you can see the Start Balance, Total Debit, Total Credit, and End Balance of each member. It gives you an option to view Active, Other, Inactive or All members and you can change the dates it displays. Click Refresh to apply your changes. If you click Download in Excel Format it will download the report to your computer as an Excel file.

Member Debits and Credits Report

Please select type of members
Active O Other O Inactive O All
From 2/1/2016
Refresh Download in Excel Format

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Name	Start Balance	Total Debit	Total Credit	End Balance
Baker, Sue	\$0.00	\$0.00	\$0.00	\$0.00
Brackett, Leigh	\$37.00	\$2.00	\$0.00	\$39.00
Harris, Clare	\$33.00	\$2.00	\$0.00	\$35.00
Jones, Mickey	\$0.00	\$2.00	\$0.00	\$2.00
Kornbluth, Cyril	-\$10.00	\$13.00	-\$3.00	\$0.00
Kuang, Ni	\$28.00	\$2.00	\$0.00	\$30.00
Lankton, Greer	\$0.00	\$2.00	\$0.00	\$2.00
Merril, Judith	\$0.00	\$2.00	\$0.00	\$2.00
Moore, Catherine	\$18.00	\$2.00	\$0.00	\$20.00
Pohl, Fred	\$28.00	\$2.00	\$0.00	\$30.00
Smith, Edward	\$38.00	\$2.00	\$0.00	\$40.00
Stapledon, Olaf	\$0.00	\$2.00	\$0.00	\$2.00
Trout, Kilgore	\$0.00	\$2.00	\$0.00	\$2.00

7. Click on **Monthly Balance Report** to see the member's balances by month.



8. This will take you to the Member Monthly Balance Report. From here you can see the balance of each member by month. It gives you an option to view Active, Other, Inactive or All members and you can change the dates it displays. Click Refresh to apply your changes. If you click Download in Excel Format it will download the report to your computer as an Excel file.

Member Monthly Balance Report

Please select type of members	۲	Active	0	Other (0	Inactive	0	All		
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to 5/1/2016 Refresh Download in Excel Format

Name	Balance On Feb 1, 2016	Balance On Mar 1, 2016	Balance On Apr 1, 2016	Balance On May 1, 2016
Baker, Sue	\$0.00	\$0.00	\$0.00	\$0.00
Brackett, Leigh	\$37.00	\$37.00	\$37.00	\$39.00
Harris, Clare	\$33.00	\$33.00	\$33.00	\$35.00
Jones, Mickey	\$0.00	\$0.00	\$0.00	\$2.00
Kornbluth, Cyril	-\$10.00	-\$10.00	-\$10.00	\$0.00
Kuang, Ni	\$28.00	\$28.00	\$28.00	\$30.00
Lankton, Greer	\$0.00	\$0.00	\$0.00	\$2.00
Merril, Judith	\$0.00	\$0.00	\$0.00	\$2.00
Moore, Catherine	\$18.00	\$18.00	\$18.00	\$20.00
Pohl, Fred	\$28.00	\$28.00	\$28.00	\$30.00
Smith, Edward	\$38.00	\$38.00	\$38.00	\$40.00
Stapledon, Olaf	\$0.00	\$0.00	\$0.00	\$2.00
Trout, Kilgore	\$0.00	\$0.00	\$0.00	\$2.00

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- Dues & Billing configuration settings