

How do I send statements to members?

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

Using the **Dues and Billing** function of ClubRunner, you can manage the accounts of your individual members. You can also send bills to your members.

1. To send a bill to a member, 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.

Billing					
Home					
Statement					
Account Statements					
Payment Entry					
Multiple Payment Entries					
Credit Adjustment					
Debit Adjustment					
Cancel Transaction					
Export to QuickBooks					

Billing Home

Show All BillsCreate New Bill

Date	Description	Status	Due Date	Comments	
Oct 6, 2020	Christmas Party Tickets	Closed	Nov 6, 2020	...	Open Delete Copy
Aug 12, 2020	Weekly BBQ August	Closed	Sep 26, 2020	Please submit payments online...	Open Delete Copy

5. You can access a number of features from the options on the left side of the screen. To view the member account statements, click on the **Account Statements** link under the heading **Statement**.

Billing
Home
Statement
Account Statements
Payment Entry
Multiple Payment Entries
Credit Adjustment
Debit Adjustment
Cancel Transaction
Export to QuickBooks
Settings
Configuration Settings


6. This will bring you to the **Account Statement** page. Here, you can view an overall

summary of all member accounts, as well as the outstanding balance.

Account Statement

Select All Members | Select Only Balance Owing Statements | Unselect All Members (Applies to all member types) Send Statement by Email

Total for all members: \$1,694.00

 Active


<input type="checkbox"/>	Member Name	Statement Last Emailed	Account Balance	
			Total:	\$1,541.00
<input type="checkbox"/>	Applegate, John	Apr 16, 2020	\$20.00	Show Transactions
<input type="checkbox"/>	Baker, Sue		\$54.00	Show Transactions
<input type="checkbox"/>	Brackett, Leigh	Apr 16, 2018	-\$204.00	Show Transactions
<input type="checkbox"/>	Chu, Edward	Jun 09, 2015	\$20.00	Show Transactions
<input type="checkbox"/>	Dean, John	Apr 22, 2020	\$20.00	Show Transactions
<input type="checkbox"/>	Dewy, Mickey		\$88.00	Show Transactions
<input type="checkbox"/>	Draper, Judith	Apr 22, 2020	\$118.00	Show Transactions
	Hampton, Charles	Apr 22, 2020	\$123.00	Show Transactions
	Jane, Mary		\$108.00	Show Transactions
<input type="checkbox"/>	Kornbluth, Cyril	Apr 22, 2020	\$20.00	Show Transactions
<input type="checkbox"/>	Kuang, Ni	Apr 22, 2020	\$166.00	Show Transactions
<input type="checkbox"/>	Moore, Catherine	Apr 22, 2020	\$126.00	Show Transactions

7. You now have two methods available to you for selecting which members you wish to mail. First, you can use the check boxes beside each name to choose individual members to mail.

Account Statement

Select All Members | Select Only Balance Owing Statements | Unselect All Members (Applies to all member types) Send Statement by Email

Total for all members: \$1,694.00

 Active

<input type="checkbox"/>	Member Name	Statement Last Emailed	Account Balance	
			Total:	\$1,541.00
<input type="checkbox"/>	Applegate, John	Apr 16, 2020	\$20.00	Show Transactions
<input type="checkbox"/>	Baker, Sue		\$54.00	Show Transactions
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<input type="checkbox"/>	Chu, Edward	Jun 09, 2015	\$20.00	Show Transactions
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<input type="checkbox"/>	Draper, Judith	Apr 22, 2020	\$118.00	Show Transactions
	Hampton, Charles	Apr 22, 2020	\$123.00	Show Transactions
	Jane, Mary		\$108.00	Show Transactions
<input type="checkbox"/>	Kornbluth, Cyril	Apr 22, 2020	\$20.00	Show Transactions
<input type="checkbox"/>	Kuang, Ni	Apr 22, 2020	\$166.00	Show Transactions
<input type="checkbox"/>	Moore, Catherine	Apr 22, 2020	\$126.00	Show Transactions

8. Or, to send a statement to every member, click the **Select All Members** link.

Account Statement

Select All Members

Select Only Balance Owing Statements | Unselect All Members (Applies to all member types)

Send Statement by Email

Total for all members: \$1,694.00



Active

<input type="checkbox"/>	Member Name	Statement Last Emailed	Account Balance	
			Total:	\$1,541.00
<input type="checkbox"/>	Applegate, John	Apr 16, 2020	\$20.00	Show Transactions
<input type="checkbox"/>	Baker, Sue		\$54.00	Show Transactions
<input type="checkbox"/>	Brackett, Leigh	Apr 16, 2018	-\$204.00	Show Transactions
<input type="checkbox"/>	Chu, Edward	Jun 09, 2015	\$20.00	Show Transactions
<input type="checkbox"/>	Dean, John	Apr 22, 2020	\$20.00	Show Transactions
<input type="checkbox"/>	Dewy, Mickey		\$88.00	Show Transactions
<input type="checkbox"/>	Draper, Judith	Apr 22, 2020	\$118.00	Show Transactions
	Hampton, Charles	Apr 22, 2020	\$123.00	Show Transactions
	Jane, Mary		\$108.00	Show Transactions
<input type="checkbox"/>	Kornbluth, Cyril	Apr 22, 2020	\$20.00	Show Transactions
<input type="checkbox"/>	Kuang, Ni	Apr 22, 2020	\$166.00	Show Transactions
<input type="checkbox"/>	Moore, Catherine	Apr 22, 2020	\$126.00	Show Transactions

9. When finished selecting members, click the button labelled **Send Statement by Email**.

Note: If there is no check box beside the member's name, this indicates that the member has no email address or the address is incorrect. For an example, please look at the member, Charles Hampton.

Note: If the member has their work address set as the preferred address in their member profile, the account statement will display the member's name, company name, and work address on the invoice. To learn more, read the [Member Profile](#) article.

Account Statement

Select All Members | Select Only Balance Owing Statements | Unselect All Members (Applies to all member types)

Send Statement by Email

Total for all members: \$1,694.00



Active

<input type="checkbox"/>	Member Name	Statement Last Emailed	Account Balance	
			Total:	\$1,541.00
<input checked="" type="checkbox"/>	Applegate, John	Apr 16, 2020	\$20.00	Show Transactions
<input checked="" type="checkbox"/>	Baker, Sue		\$54.00	Show Transactions
<input checked="" type="checkbox"/>	Brackett, Leigh	Apr 16, 2018	-\$204.00	Show Transactions
<input checked="" type="checkbox"/>	Chu, Edward	Jun 09, 2015	\$20.00	Show Transactions
<input checked="" type="checkbox"/>	Dean, John	Apr 22, 2020	\$20.00	Show Transactions
<input checked="" type="checkbox"/>	Dewy, Mickey		\$88.00	Show Transactions
<input checked="" type="checkbox"/>	Draper, Judith	Apr 22, 2020	\$118.00	Show Transactions

10. The browser will display a green confirmation message, stating the account statement email has been sent to the selected recipients.

Email sent successfully:06/10/2020 4:39:06 PM

Related Content

- [How do I resend invoices to selected members?](#)
- [How do I adjust the amount a member owes?](#)
- [How do I view member account statements?](#)
- [How do I specify a preferred email address for dues & billing?](#)
- [How do I enter multiple payments for Dues & Billing?](#)
- [How can I prevent an ex-member from receiving invoices?](#)