ClubRunner

Help Articles > Club Help > Club - Administration Guide > Dues & Billing > How do I send statements to members?

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	Billing H	lome			Show A	Il Bills Create New Bill
Payment Entry	Date	Description	Status	Due Date	Comments	
Multiple Payment Entries Credit Adjustment Debit Adjustment	Oct 6, 2020	Christmas Party Tickets	Closed	Nov 6, 2020		Open Delete Copy
Cancel Transaction Export to OuickBooks	Aug 12, 2020	Weekly BBQ August	Closed	Sep 26, 2020	Please submit payments online	Open Delete Copy

 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**.



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.

Select Al	l Memb	ers Select Only Balance Owin	g Statements Unselect All Members (Appl	ies to all member types)	Send Statement by Email
			Total for a	l members: \$1,694.00	
22	Active				
		Member Name	Statement Last Emailed	Account Balance	
				Total: \$1,541.00	
		Applegate, John	Apr 16, 2020	\$20.00	Show Transactions
		Baker, Sue		\$54.00	Show Transactions
		Brackett, Leigh	Apr 16, 2018	-\$204.00	Show Transactions
		Chu, Edward	Jun 09, 2015	\$20.00	Show Transactions
		Dean, John	Apr 22, 2020	\$20.00	Show Transactions
		Dewy, Mickey		\$88.00	Show Transactions
		Draper, Judith	Apr 22, 2020	\$118.00	Show Transactions
		Hampton, Charles	Apr 22, 2020	\$123.00	Show Transactions
		Jane, Mary		\$108.00	Show Transactions
		Kornbluth, Cyril	Apr 22, 2020	\$20.00	Show Transactions
		Kuang, Ni	Apr 22, 2020	\$166.00	Show Transactions
		Moore, Catherine	Apr 22, 2020	\$126.00	Show Transactions

 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
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Account Statement

Select All	Membe	ers Select Only Balance Owing Statements Un	select All Members (Applie	es to all n	nember types)	Send Statement by Email
			Total for all	member	s: \$1,694.00	
22	Active					
		Member Name	Statement Last Emailed	Αссοι	unt Balance	
				Total:	\$1,541.00	
		Applegate, John	Apr 16, 2020		\$20.00	Show Transactions
		Baker, Sue			\$54.00	Show Transactions
		Brackett, Leigh	Apr 16, 2018		-\$204.00	Show Transactions
		Chu, Edward	Jun 09, 2015		\$20.00	Show Transactions
		Dean, John	Apr 22, 2020		\$20.00	Show Transactions
		Dewy, Mickey			\$88.00	Show Transactions
		Draper, Judith	Apr 22, 2020		\$118.00	Show Transactions
		Hampton, Charles	Apr 22, 2020		\$123.00	Show Transactions
		Jane, Mary			\$108.00	Show Transactions
		Kornbluth, Cyril	Apr 22, 2020		\$20.00	Show Transactions
		Kuang, Ni	Apr 22, 2020		\$166.00	Show Transactions
		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 n	nembers: \$1,694.00	
22	Active				
		Member Name	Statement Last Emailed	Account Balance	
				Total: \$1,541.00	
		Applegate, John	Apr 16, 2020	\$20.00	Show Transactions
		Baker, Sue		\$54.00	Show Transactions
		Brackett, Leigh	Apr 16, 2018	-\$204.00	Show Transactions
		Chu, Edward	Jun 09, 2015	\$20.00	Show Transactions
		Dean, John	Apr 22, 2020	\$20.00	Show Transactions
		Dewy, Mickey		\$88.00	Show Transactions
		Draper, Judith	Apr 22, 2020	\$118.00	Show Transactions
		Hampton, Charles	Apr 22, 2020	\$123.00	Show Transactions
		Jane, Mary		\$108.00	Show Transactions
		Kornbluth, Cyril	Apr 22, 2020	\$20.00	Show Transactions
		Kuang, Ni	Apr 22, 2020	\$166.00	Show Transactions
		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 <u>Member Profile</u> article.

Account Statement

elect All	Membe	rs Select Only Balance Owing Statements L	Jnselect All Members (Ap	pplies to all member types)	Send Statement by Ema
			Total for	all members: \$1,694.00	
22	Active				
		Member Name	Statement Last Emailed	Account Balance	
				Total: \$1,541.00	
	✓	Applegate, John	Apr 16, 2020	\$20.00	Show Transactions
	~	Baker, Sue		\$54.00	Show Transactions
	Z	Brackett, Leigh	Apr 16, 2018	-\$204.00	Show Transactions
	~	Chu, Edward	Jun 09, 2015	\$20.00	Show Transactions
	~	Dean, John	Apr 22, 2020	\$20.00	Show Transactions
	~	Dewy, Mickey		\$88.00	Show Transactions
	~	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?