

ClubRunner

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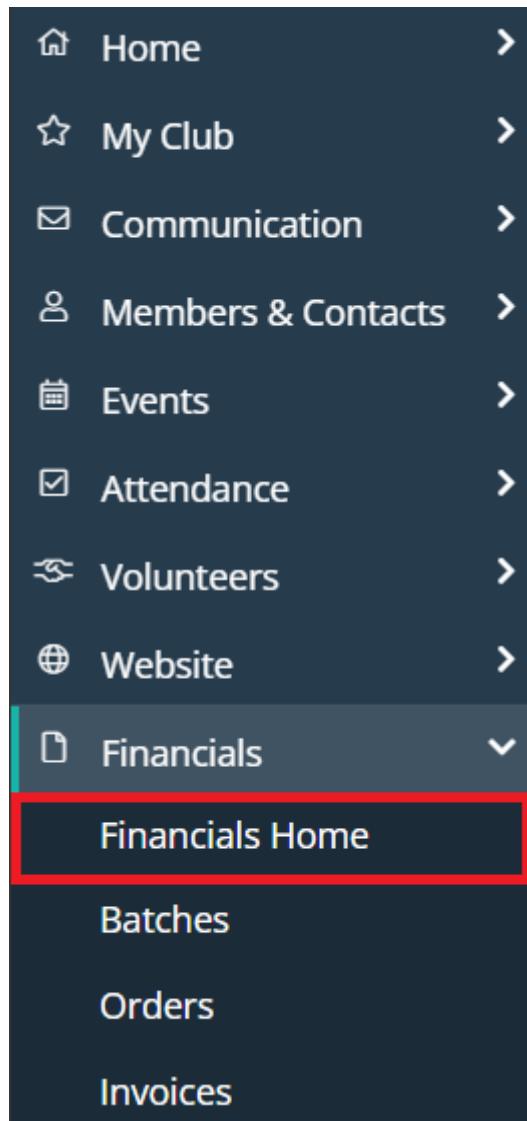
[NOVA] How do I manage my finance settings?

Michael M. - 2025-11-04 - [Financial](#)

In ClubRunner Nova, you can edit your invoice settings and financial notifications for your club. This support article will show you how you can manage the settings for your club's financials module.

To learn how to edit your payment account settings, please read the article: [How do I manage my payment accounts?](#)

1. Log in to your account through your club homepage, then click on **Member Area** on the top right under your club banner. [Alternatively, click here to go directly to the ClubRunner login page.](#)
2. On the left hand menu, click the arrow to the right of **Financials**, then click on **Financials Home**.



3. Scroll to the bottom of the page and click **Finance Settings** under the Account Finance Settings section.

The dashboard features four main modules: Batches (orange), Orders (green), Invoices (blue), and Payments (pink). Below these are three sections: ACCOUNT FINANCE SETTINGS (with Finance Settings highlighted in red), FINANCE REPORTS (listing Dues Report, Events Report, Products Report, Donations Report, Sales Report, Service Fees, and Promo Codes Report), and LEGACY DUES & BILLING REPORTS (noting the module is retired and listing Export to QuickBooks, Member Monthly Balance Report, and Member Debits and Credits Report).

4. Click the **Edit** button in the Invoice Settings section to adjust the information that appears on the invoices issued by your club.

The Invoice Settings window contains the following fields:
Business Number: 918471239
Business Number Description: Rotary Club Foundation Account
Invoice/Order Comment: Please mail payments to Club Treasurer
Address: 100 Main St, Springfield, IL
Payment Terms: 30 Day(s)
Allow partial payments: Yes
Minimum Payment: 5.00 (USD)
Invoice Logo:

In the window that appears, you can edit your club's business information, payment terms, and can enable partial payments for invoices. Click **Save** to save your changes.

Partial Payment Allow partial payments
When selected, payments made through the website invoice page can be less than the total amount owed.

Set minimum payment to:

Fixed Amount (USD) *

Percentage Amount

Cancel **Save**

5. On the right-hand side, click the **Edit** buttons to edit the options for creating records of orders with no charges, and to set the first month of your fiscal year. Make your changes in the window that appears and click **Save**.

FINANCIAL RECORD SETTINGS **Edit**

Create financial record for No free of charge orders?

FISCAL YEAR SETTINGS **Edit**

Start Month July

6. You may click the **Edit** button in the Financial Notification Settings section to open a window where you can change the email templates used for financial transactions.

FINANCIAL NOTIFICATIONS SETTINGS **Edit**

NOTIFICATION	EMAIL TEMPLATE	
Invoice Message Template	Invoice	Preview
Attachment Message Template	Invoice pdf attachment	Preview
Order HTML Template	Order HTML Template	Preview
Order PDF Template	Order PDF Template	Preview

Use the drop-down menu to select the Sender Profile that will be used to send financial notification emails, and select which email templates are used for each kind of financial notification.
Click **Save** when you have made your desired changes.

Update Financial Notifications Settings

X

Please exercise caution when editing the template settings below. The notifications here represent the invoice template your members receive for dues and online store purchases. [Click here](#) to learn more.

Send From

-- Select Sender Profile -- ▾

Only **Invoice and Order HTML Message Template** emails sent from **Subscription Action Notifications** and **Membership Notifications** will be able to use sender profile.

Invoice Message Template

Invoice ▾

Attachment Message Template

Invoice pdf attachment ▾

Order HTML Template

Order HTML Template ▾

Order PDF Template

Order PDF Template ▾

Cancel

Save

Note

For more information about sender profiles, please read: [How do I edit sender profiles?](#)