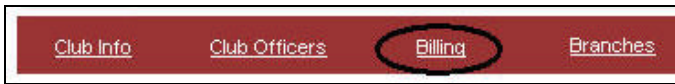


Using the Billing Function for Clubs

The **Billing** function can be accessed by **Clicking** on that link on that link on the **Club Administration Home** page.



When you click that link, you will get the following window:

The screenshot shows the 'Billing' window for Club ROCHESTER 76 (31420). The 'Bill Period End Date' is 4/14/2004. The 'Activity' is 'No Records Found'. There are 'Add', 'Complete', and 'Reset' buttons at the bottom. The 'Add' button is circled in red.

Click the **Add** button as show. The next window will be displayed.

The screenshot shows the 'Billing Add' window for Club ROCHESTER 76 (31420). The 'Activity' field is empty. The 'Activity Date' is empty. The 'Amount' is empty. The 'Bill All Members' is set to 'Yes'. There is a red box with the text 'Be sure to choose either Yes or No for the Bill All Members item'. The 'Save Charge Item' button is circled in red.

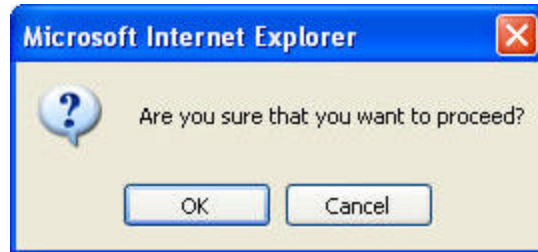
Fill in **ALL** the fields, and then **Click** the **Save Charge Item**

The following window is displayed.

The screenshot shows the 'Billing Add' window for Club ROCHESTER 76 (31420) with the following data: 'Activity: Awards Banquet', 'Activity Date: 4/15/2004', 'Bill All Members: Yes', and 'Amount: 15.00'. The 'Complete' button is circled in red.

Continue by **Clicking** on the **Complete** button, as circled above.

The following warning message will be displayed:



When you **Click** on **OK**, you will get a list of your members to be billed.

The screenshot shows the 'Billing Complete' window for Club ROCHESTER 76 (31420). The 'Activity' is 'Awards Banquet'. The table below lists members to be billed:

Member Name:	1	2	3	4	5	6	Member Number	Amount:
ANDERSON, GREGORY	Y						1420838	15.00
CARLSON, COREY	Y						1420839	15.00
CARLSON, PAULA	Y						1420840	15.00
DOCKTER, VERN	Y						1420841	15.00
DOCKTER, GLORIA	Y						1420842	15.00
EDSON, KIMBERLY	Y						1420843	15.00
HILL, JOHN	Y						1420844	15.00
HOWE, LAWRENCE	Y						1420845	15.00
HYATT, ROBERT E	Y						1420846	15.00
HYATT, ELIZABETH	Y						1426196	15.00

The 'Complete' button is circled in red.

Next, **Click** the **Complete** button again. The following window will be displayed:

The screenshot shows the 'Billing Complete' window for Club ROCHESTER 76 (31420). The table below lists members to be billed with their status:

Member Name:	Member Number	Status:
ANDERSON, GREGORY	1420838	Not yet sent
CARLSON, COREY	1420839	Not yet sent
CARLSON, PAULA	1420840	Not yet sent
DOCKTER, VERN	1420841	Not yet sent
DOCKTER, GLORIA	1420842	Not yet sent
EDSON, KIMBERLY	1420843	Not yet sent
HILL, JOHN	1420844	Not yet sent
HOWE, LAWRENCE	1420845	Not yet sent
HYATT, ROBERT E	1420846	Not yet sent
HYATT, ELIZABETH	1426196	Not yet sent

The 'Print Report' button is circled in red.

Finally, **Click** the **Print Report** button, and Acrobat Reader will display a report with one page per member to be billed, that looks like this the one on the next page.

ROCHESTER 76 LIONS CLUB
ROCHESTER, MN

Invoice Printed: April 24, 2004
Bill Period End Date: April 14, 2004

ANDERSON, GREGORY
Membership Number: 1420838
1303 4TH ST SE
ROCHESTER, MN 55904

Activity	Activity Name	Amount
May 20, 2004	Awards Banquet	15.00
Total Due:		15.00

The above report can then be printed and mailed or otherwise distributed to club members.

If you select **No** after filling in the fields for a billable activity, you will get the window below:

Club: ROCHESTER 76 (31420)

Bill Period End Date: 4/24/2004 MAXIMUM*

Activity:	Activity Date:	Bill All Members:	Amount:
Meeting Meal	4/25/2004	No	12.00

An asterisk (*) next to a field indicates that the field is required.

Note that in this window, **Bill All Members** is set to **No**. To proceed, **Click the Complete** button, and the program will display the list of members, similar to above:

Club: ROCHESTER 76 (31420)

Activity: 1 Meeting Meal,

Member Name:	1	2	3	4	5	6	Member Number	Amount:
ANDERSON, GREGORY	N						1420838	0.00
CARLSON, COREY	N						1420839	0.00
CARLSON, PAULA	N						1420840	0.00
DOCKTER, VERN	N						1420841	0.00
DOCKTER, GLORIA	N						1420842	0.00
EDSON, KIMBERLY	N						1420843	0.00
HILL, JOHN	N						1420844	0.00
HOWE, LAWRENCE	N						1420845	0.00
HYATT, ROBERT E	N						1420846	0.00
HYATT, ELIZABETH	N						1426196	0.00

1 2 3

Having clicked on a member name, the program will present this window:

Club: ROCHESTER 76 (31420)
Member #: 1420840
Member Name: PAULA CARLSON

Activity: Meeting Meal Amount: 12 Bill Member: Yes No

In this window, Click the "Yes" button if you want to bill this member for this activity. Then, Click the "Save Assessment" button, as shown

The program will return you to the Member List window, where you can repeat the process as often as you need to bill everyone that participated in that billable activity. Not that the status has changed on the member that was chosen- in this case, Paula Carlson.

Club: ROCHESTER 76 (31420)

Activity: 1 Meeting Meal,

Member Name:	1	2	3	4	5	6	Member Number	Amount:
ANDERSON, GREGORY	N						1420838	0.00
CARLSON, COREY	N						1420839	0.00
CARLSON, PAULA	Y						1420840	12.00
DOCKTER, VERN	N						1420841	0.00
DOCKTER, GLORIA	N						1420842	0.00
EDSON, KIMBERLY	N						1420843	0.00
HILL, JOHN	N						1420844	0.00
HOWE, LAWRENCE	N						1420845	0.00
HYATT, ROBERT E	N						1420846	0.00
HYATT, ELIZABETH	N						1426196	0.00

1 2 3

When you have selected all members to be billed, **Click the Complete** Button.

The Billing Status/Recap window will be displayed.

Club: ROCHESTER 76 (31420)

Member Name:	Member Number	Status:
ANDERSON, GREGORY	1420838	Not yet sent
CARLSON, COREY	1420839	Not yet sent
CARLSON, PAULA	1420840	Not yet sent
DOCKTER, VERN	1420841	Not yet sent
DOCKTER, GLORIA	1420842	Not yet sent
EDSON, KIMBERLY	1420843	Not yet sent
HILL, JOHN	1420844	Not yet sent
HOWE, LAWRENCE	1420845	Not yet sent
HYATT, ROBERT E	1420846	Not yet sent
HYATT, ELIZABETH	1426196	Not yet sent

1 2 3

Click the Print Report button to complete the process, as above. You will get the same sort of report as the one on the top right of this page.