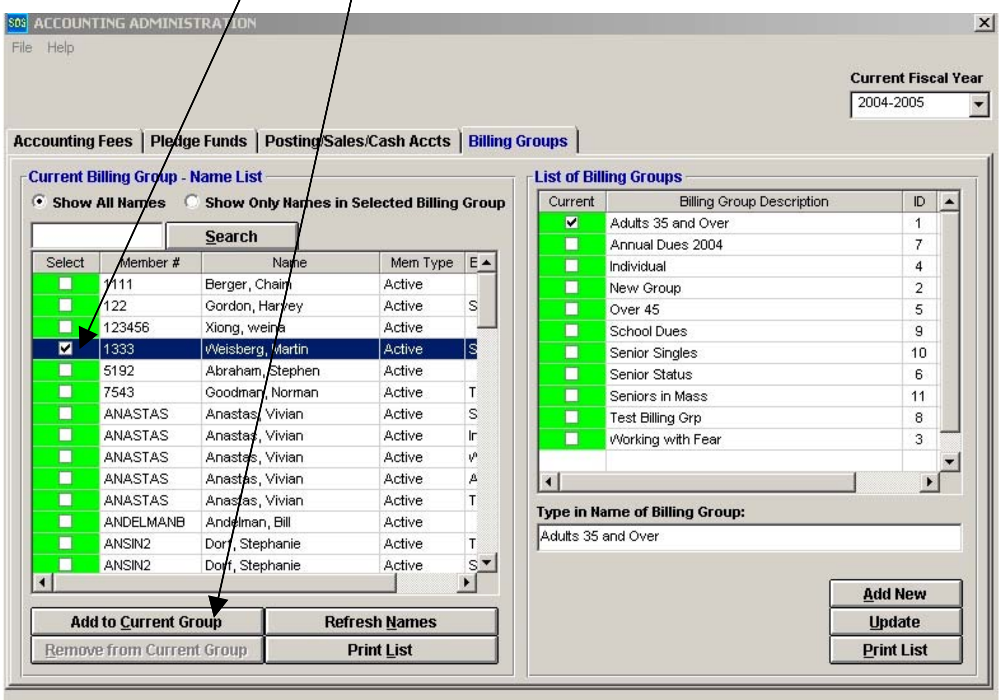
HOW TO USE THE BILLING GROUP FEATURE

1: In Member Finances, select Accounting, then Accounting List Admin
2: How do you add and update Billing Group?
If <u>adding</u> a new Billing Group:
Click the **Add New** button, enter the Billing Group name, and accept the new record.
If <u>updating</u> an existing Billing Group:
Check a name from the Billing Group grid, make changes and click the **Save Changes** button.

3: How do you add Members to a Billing Group?
Go to the *Billing Groups* screen and check a Billing Group from the Billing Group grid to make it Current.
Select the Show All Names option from the Current Billing Group - Name List frame.
Click the **Refresh Names** button to display all the Members.
Check all the Members to add to the selected Billing Group.
Click the **Add to Current Billing Group** button.

Click on Names to be added
Then Add to Current Group



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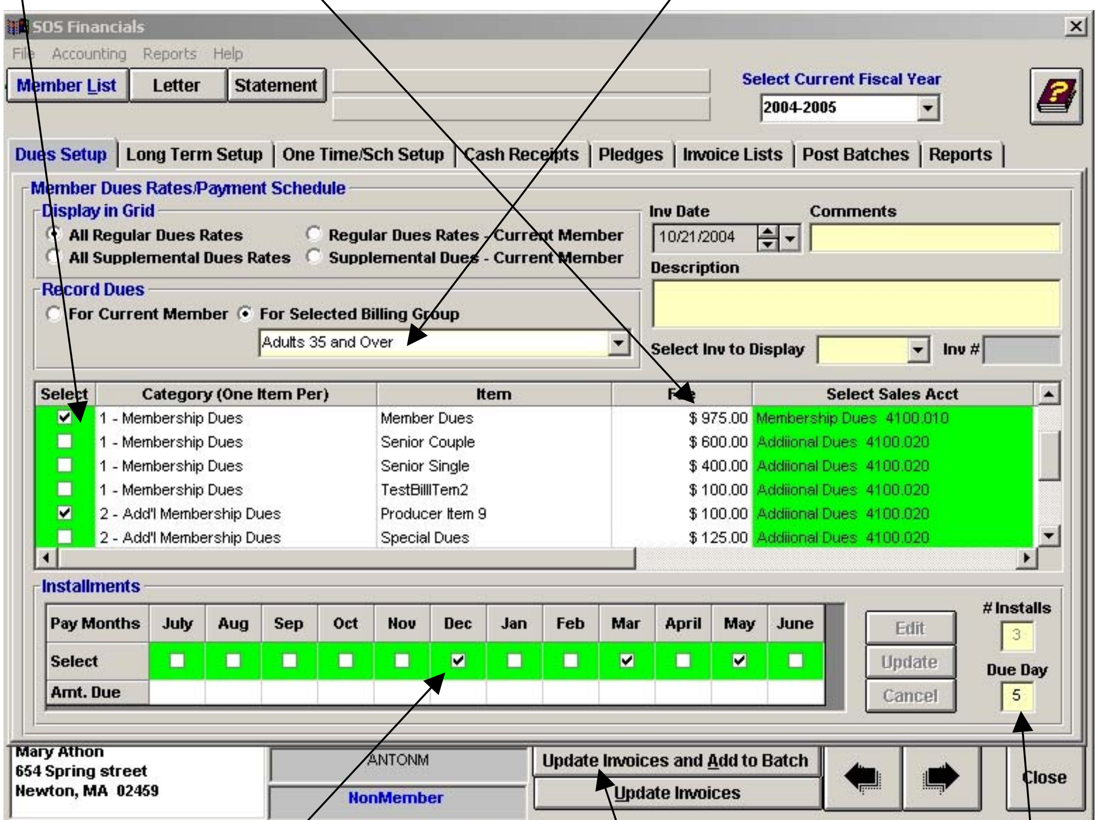
HOW TO USE THE BILLING GROUP FEATURE

1: Click on Dues Set Up Tab
2: Select the All-Regular Dues Rates option
3: Billing items added in Accounting List Admin will display in the grid
4: Check the items you wish to include in the invoice
   Change Invoice Date if desired
   Edit fee or Sales Account if desired
   Select a Sales Account if one is not displaying
   Check the desired Installment months
   Type in a Due Date or accept the default due date
5: Click on for selected Billing Group and use one of the Groups from list
6: Click on the Record Invoice and add to Batch button.
TOTAL TIME for 10 to 110 to 510 or more Invoices, 10 minutes.

Select the Items to Invoice
Change the amount if needed

Select the Billing group



Select the month(s) the payment(s) are due.

Select Update Invoices and add to Batch

Select the due date

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