

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 adding a new Billing Group:

Click the **Add New** button, enter the Billing Group name, and accept the new record.

If updating 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

Select	Member #	Name	Mem Type
<input type="checkbox"/>	M00001	Aaron, Alan	Active
<input type="checkbox"/>	M00033	Abbey, Jared	Active
<input type="checkbox"/>	M00065	Abrams, Andrew	Active
<input type="checkbox"/>	M00100	Abrams, Todd	Active
<input type="checkbox"/>	M00325	Abuaf, Niso	Active
<input type="checkbox"/>	M00360	Adelman, John	Active
<input type="checkbox"/>	M00390	Adelman, Myles	Active
<input type="checkbox"/>	M00445	Ades, Maurice	Active
<input type="checkbox"/>	M00585	Aidekman, Jeffrey	Active
<input type="checkbox"/>	M00750	Albert, Louis	Active
<input type="checkbox"/>	M00775	Algazy, Jeffrey	Active
<input type="checkbox"/>	M00942	Allen, Mason	Active

Current	Billing Group Description	ID
<input checked="" type="checkbox"/>	Brotherhood Dues	1
<input type="checkbox"/>	ECC Incentives	15
<input type="checkbox"/>	First Year Free	17
<input type="checkbox"/>	Honorary	3
<input type="checkbox"/>	July-Mid Year Billing	18
<input type="checkbox"/>	Married Age 28- 32	5
<input type="checkbox"/>	Married Age 33 to 34	6
<input type="checkbox"/>	Out of State	8
<input type="checkbox"/>	Over 35 Married	7
<input type="checkbox"/>	Over 35 Single	10
<input type="checkbox"/>	Over 85	9
<input type="checkbox"/>	Single 28-32	19

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
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

SOS Financials

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Billing Setup Long Term Setup Invoice Lists Post Batches

Member Dues Rates/Payment Schedule

Dues Type Billing

Dues Invoices Membership Dues Batch # 0

Billing Item

Fee	Sales Account Desc	Credit Acct G/L	Off Set Account Desc	Debit Acct G/L	Bill Code	Donate
1275	Membership Dues	4100-600-01	Accounts	1100-001-00	01	Yes

Comments Description Auto Include Description Add New Billing Item

Billing Details

Inv Date 03/07/2011 Due Date 04/06/2011 # Install 1 30 Payment Plan

Record Dues

For Current Membe
 For Selected Billing Group
Add Member to Selected Group
For Selected Member Type

Global Billing Options

Fixed Rate
Fixed Increase
% Increase

Do Not Use Values

Anonymous Financials

No (Default)
Yes

Leonard Ansin T99999 Update Invoice Search Last Name Similar Close

101 Commonwealth Ave Boston, MA 02207 Inquiry lansin@ansintech.com

Select the Invoice date.

Select Add new Billing
and add to Batch

Select the due
date