

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

The screenshot displays the 'ACCOUNTING ADMINISTRATION' window. The 'Billing Groups' tab is active, showing a 'List of Billing Groups' table with columns for 'Current', 'Billing Group Description', and 'ID'. The 'Adults 35 and Over' group (ID 1) is selected. Below this, the 'Current Billing Group - Name List' is shown with 'Show All Names' selected. A table lists members with columns for 'Select', 'Member #', 'Name', and 'Mem Type'. The member 'Weisberg, Martin' (ID 1333) is selected. At the bottom, there are buttons for 'Add to Current Group', 'Refresh Names', 'Remove from Current Group', and 'Print List'. A callout box with arrows points to the 'Add to Current Group' button.

Current	Billing Group Description	ID
<input checked="" type="checkbox"/>	Adults 35 and Over	1
<input type="checkbox"/>	Annual Dues 2004	7
<input type="checkbox"/>	Individual	4
<input type="checkbox"/>	New Group	2
<input type="checkbox"/>	Over 45	5
<input type="checkbox"/>	School Dues	9
<input type="checkbox"/>	Senior Singles	10
<input type="checkbox"/>	Senior Status	6
<input type="checkbox"/>	Seniors in Mass	11
<input type="checkbox"/>	Test Billing Grp	8
<input type="checkbox"/>	Working with Fear	3

Select	Member #	Name	Mem Type	E
<input type="checkbox"/>	1111	Berger, Chaim	Active	
<input type="checkbox"/>	122	Gordon, Harley	Active	S
<input type="checkbox"/>	123456	Xiong, weina	Active	
<input checked="" type="checkbox"/>	1333	Weisberg, Martin	Active	S
<input type="checkbox"/>	5192	Abraham, Stephen	Active	
<input type="checkbox"/>	7543	Goodman, Norman	Active	T
<input type="checkbox"/>	ANASTAS	Anastas, Vivian	Active	S
<input type="checkbox"/>	ANASTAS	Anastas, Vivian	Active	lr
<input type="checkbox"/>	ANASTAS	Anastas, Vivian	Active	v
<input type="checkbox"/>	ANASTAS	Anastas, Vivian	Active	A
<input type="checkbox"/>	ANASTAS	Anastas, Vivian	Active	T
<input type="checkbox"/>	ANDELMANB	Andelman, Bill	Active	
<input type="checkbox"/>	ANSIN2	Dorf, Stephanie	Active	T
<input type="checkbox"/>	ANSIN2	Dorf, Stephanie	Active	S

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