

## How do I send statements to members?

Michael C. - 2021-02-23 - Dues & Billing

Using the **Dues and Billing** function of ClubRunner, you can manage the accounts of your individual members. You can also send bills to your members.

1. To send a bill to a member, you must go to your club homepage and log in. Then, click on **Member Area** on the top right.
2. Along the top of the screen you will see several tabs. Click on **Organization**.
3. Next, click **Dues and Billing**.
4. You are now on the **Billing Home** page. Here, you can view and edit the details of current billings and member invoices.

| Date         | Description             | Status | Due Date     | Comments                         |
|--------------|-------------------------|--------|--------------|----------------------------------|
| Oct 6, 2020  | Christmas Party Tickets | Closed | Nov 6, 2020  | ...                              |
| Aug 12, 2020 | Weekly BBQ August       | Closed | Sep 26, 2020 | Please submit payments online... |

5. You can access a number of features from the options on the left side of the screen. To view the member account statements, click on the **Account Statements** link under the heading **Statement**.

- Billing
  - Home
- Statement
  - Account Statements
  - Payment Entry
  - Multiple Payment Entries
  - Credit Adjustment
  - Debit Adjustment
  - Cancel Transaction
  - Export to QuickBooks
- Settings
  - Configuration Settings


6. This will bring you to the **Account Statement** page. Here, you can view an overall

summary of all member accounts, as well as the outstanding balance.

### Account Statement

Select All Members | Select Only Balance Owing Statements | Unselect All Members (Applies to all member types) [Send Statement by Email](#)

Total for all members: \$1,694.00

 Active


| <input type="checkbox"/> | Member Name      | Statement Last Emailed | Account Balance |                   |
|--------------------------|------------------|------------------------|-----------------|-------------------|
|                          |                  |                        | Total:          | \$1,541.00        |
| <input type="checkbox"/> | Applegate, John  | Apr 16, 2020           | \$20.00         | Show Transactions |
| <input type="checkbox"/> | Baker, Sue       |                        | \$54.00         | Show Transactions |
| <input type="checkbox"/> | Brackett, Leigh  | Apr 16, 2018           | -\$204.00       | Show Transactions |
| <input type="checkbox"/> | Chu, Edward      | Jun 09, 2015           | \$20.00         | Show Transactions |
| <input type="checkbox"/> | Dean, John       | Apr 22, 2020           | \$20.00         | Show Transactions |
| <input type="checkbox"/> | Dewy, Mickey     |                        | \$88.00         | Show Transactions |
| <input type="checkbox"/> | Draper, Judith   | Apr 22, 2020           | \$118.00        | Show Transactions |
| <input type="checkbox"/> | Hampton, Charles | Apr 22, 2020           | \$123.00        | Show Transactions |
| <input type="checkbox"/> | Jane, Mary       |                        | \$108.00        | Show Transactions |
| <input type="checkbox"/> | Kornbluth, Cyril | Apr 22, 2020           | \$20.00         | Show Transactions |
| <input type="checkbox"/> | Kuang, Ni        | Apr 22, 2020           | \$166.00        | Show Transactions |
| <input type="checkbox"/> | Moore, Catherine | Apr 22, 2020           | \$126.00        | Show Transactions |

7. You now have two methods available to you for selecting which members you wish to mail. First, you can use the check boxes beside each name to choose individual members to mail.

### Account Statement

Select All Members | Select Only Balance Owing Statements | Unselect All Members (Applies to all member types) [Send Statement by Email](#)

Total for all members: \$1,694.00

 Active

| <input type="checkbox"/> | Member Name      | Statement Last Emailed | Account Balance |                   |
|--------------------------|------------------|------------------------|-----------------|-------------------|
|                          |                  |                        | Total:          | \$1,541.00        |
| <input type="checkbox"/> | Applegate, John  | Apr 16, 2020           | \$20.00         | Show Transactions |
| <input type="checkbox"/> | Baker, Sue       |                        | \$54.00         | Show Transactions |
| <input type="checkbox"/> | Brackett, Leigh  | Apr 16, 2018           | -\$204.00       | Show Transactions |
| <input type="checkbox"/> | Chu, Edward      | Jun 09, 2015           | \$20.00         | Show Transactions |
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| <input type="checkbox"/> | Kuang, Ni        | Apr 22, 2020           | \$166.00        | Show Transactions |
| <input type="checkbox"/> | Moore, Catherine | Apr 22, 2020           | \$126.00        | Show Transactions |

8. Or, to send a statement to every member, click the **Select All Members** link.

## Account Statement

Select All Members | Select Only Balance Owing Statements | Unselect All Members (Applies to all member types) Send Statement by Email

Total for all members: \$1,694.00



Active

| <input type="checkbox"/> | Member Name      | Statement Last Emailed | Account Balance |                   |
|--------------------------|------------------|------------------------|-----------------|-------------------|
|                          |                  |                        | Total:          | \$1,541.00        |
| <input type="checkbox"/> | Applegate, John  | Apr 16, 2020           | \$20.00         | Show Transactions |
| <input type="checkbox"/> | Baker, Sue       |                        | \$54.00         | Show Transactions |
| <input type="checkbox"/> | Brackett, Leigh  | Apr 16, 2018           | -\$204.00       | Show Transactions |
| <input type="checkbox"/> | Chu, Edward      | Jun 09, 2015           | \$20.00         | Show Transactions |
| <input type="checkbox"/> | Dean, John       | Apr 22, 2020           | \$20.00         | Show Transactions |
| <input type="checkbox"/> | Dewy, Mickey     |                        | \$88.00         | Show Transactions |
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| <input type="checkbox"/> | Kornbluth, Cyril | Apr 22, 2020           | \$20.00         | Show Transactions |
| <input type="checkbox"/> | Kuang, Ni        | Apr 22, 2020           | \$166.00        | Show Transactions |
| <input type="checkbox"/> | Moore, Catherine | Apr 22, 2020           | \$126.00        | Show Transactions |

9. When finished selecting members, click the button labelled **Send Statement by Email**.

**Note:** If there is no check box beside the member's name, this indicates that the member has no email address or the address is incorrect. For an example, please look at the member, Charles Hampton.

**Note:** If the member has their work address set as the preferred address in their member profile, the account statement will display the member's name, company name, and work address on the invoice. To learn more, read the [Member Profile](#) article.

## Account Statement

Select All Members | Select Only Balance Owing Statements | Unselect All Members (Applies to all member types)

Send Statement by Email

Total for all members: \$1,694.00



Active

| <input type="checkbox"/>            | Member Name     | Statement Last Emailed | Account Balance |                   |
|-------------------------------------|-----------------|------------------------|-----------------|-------------------|
|                                     |                 |                        | Total:          | \$1,541.00        |
| <input checked="" type="checkbox"/> | Applegate, John | Apr 16, 2020           | \$20.00         | Show Transactions |
| <input checked="" type="checkbox"/> | Baker, Sue      |                        | \$54.00         | Show Transactions |
| <input checked="" type="checkbox"/> | Brackett, Leigh | Apr 16, 2018           | -\$204.00       | Show Transactions |
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| <input checked="" type="checkbox"/> | Draper, Judith  | Apr 22, 2020           | \$118.00        | Show Transactions |

10. The browser will display a green confirmation message, stating the account statement email has been sent to the selected recipients.

Email sent successfully:06/10/2020 4:39:06 PM

Related Content

- [How do I resend invoices to selected members?](#)
- [How do I adjust the amount a member owes?](#)
- [How do I view member account statements?](#)
- [How do I specify a preferred email address for dues & billing?](#)
- [How do I enter multiple payments for Dues & Billing?](#)
- [How can I prevent an ex-member from receiving invoices?](#)