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Billing Members in Groups

If you would like to bill a group of members on a periodic basis follow these simple steps…

1. Click on the Groups button from the Main Menu
2. Click on Add Group to create a Group for your members that you will bill regularly
3. Put your members into the group who will be billed regularly
    a. Double click on a name on the right 'Others that are Eligible to Join' box to add them to the Current Group Members box on the left or;
    b. Click on a name on the right and click on the green arrow
    c. You can select multiple members by clicking on one then hold down the CTRL key and selecting additional names
4. Once all the members are in the group, click on the Select All button on the bottom left corner of the Current Group Members box
5. Click on the Apply Fee button on the bottom of the screen
6. On the Apply a Group Fee screen
    a. Change the Date if needed
    b. Choose the Account from the dropdown (NOTE: If you do not see the account needed then go to Organization Information, click on the Accounts/MOP tab and add a new account
    c. Choose the Charge Method
        i.   Single Charge Amount – everyone will be charged the same amount
        ii. One Charge Amount per Fee Level – everyone would be charged based on their current Fee Level on the bottom left of their Members screen
        iii. Individualized Charge Amounts – fill in the amount for each member individually
    d. Fill in a Comment Example: Weekly Fee mm-dd-yyyy
7. Optionally click on the checkbox on the bottom left to Auto-apply Credits to Charges to automatically apply any member credits to this charge.
8. Click on the Apply button
9. You will be asked "Are you sure?" Click Yes
10. You will receive a message that the charges have been applied and asked if you want to do another. Click No
11. Click on the Close button to finish the process

NOTE: You can alter these instructions for billing for any group that you want to create.

Groups can also be created from the Universal Selection Engine screen by choosing your criteria and then clicking on the Grouping Tools button and following the steps on that screen.