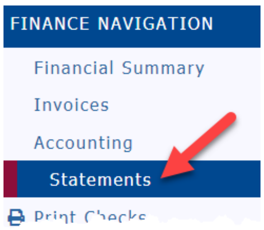
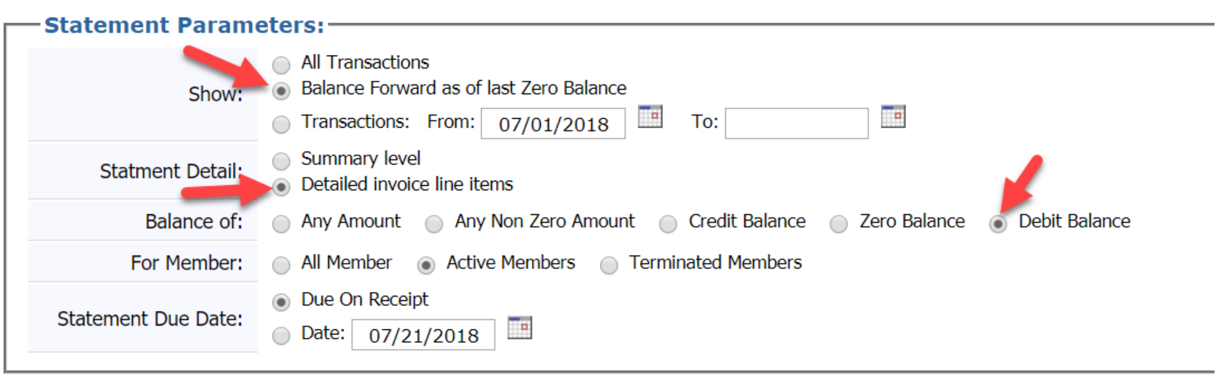
Statements

The purpose of this document is to explain the use of a statement. Invoices, by definition, do not show a prior balance. Statements, however, do. Good practice is to send your invoices at the beginning of your billing cycle, and follow up with at least two statements before the next invoice goes out. Statements are a nice, gentle reminder to those members who have not paid yet. Also, they are faster than invoices to get out the door (should be one minute or less). It is very quick to filter out all member's who have already paid and send statements to those who haven't yet.

1. **Statements hyperlink**: Found in the Finance Navigation menu on the left.



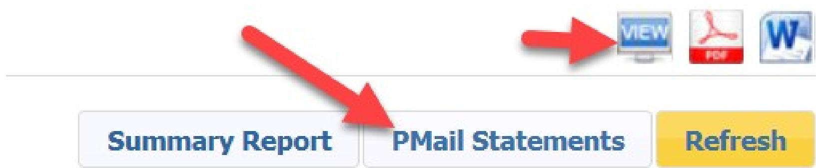
2. **Select Parameters:** Recommendations are pointed out below. Click the Refresh button in the upper right corner after changing selections.



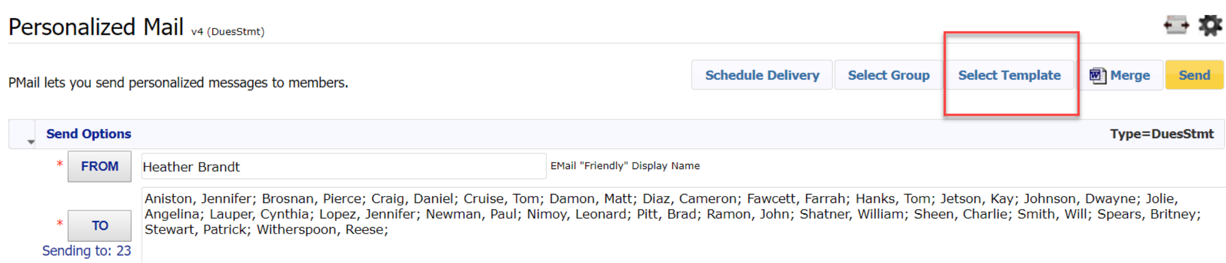
3. **Select Members:** After clicking the Refresh button, all members will be selected. This should be your refined list of members that need an invoice, however it is possible to uncheck a select few members, or if you just posted an invoice group, it is possible to uncheck all members by unchecking the box in the blue title bar next to "Member Name" and checking only the few that need a statement.

☑	Member Name	Balance Due
☑	Aniston, Jennifer	2,399.00
☑	Brosnan, Pierce	11,668.00
☑	Craig, Daniel	4,936.00
☑	Cruise, Tom	7,358.00
☑	Damon, Matt	7,178.00
☑	Diaz, Cameron	9,058.00
☑	Fawcett, Farrah	550.00
☑	Hanks, Tom	5,304.00
☑	Jetson, Kay	160.00
☑	Johnson, Dwayne	10,708.00
☑	Jolie, Angelina	8,318.00
☑	Lauper, Cynthia	2,938.00
☑	Lopez, Jennifer	7,918.00
☑	Newman, Paul	7,668.00
☑	Nimoy, Leonard	6,738.00
☑	Pitt, Brad	7,458.00
☑	Ramon, John	330.00
☑	Shatner, William	3,558.00

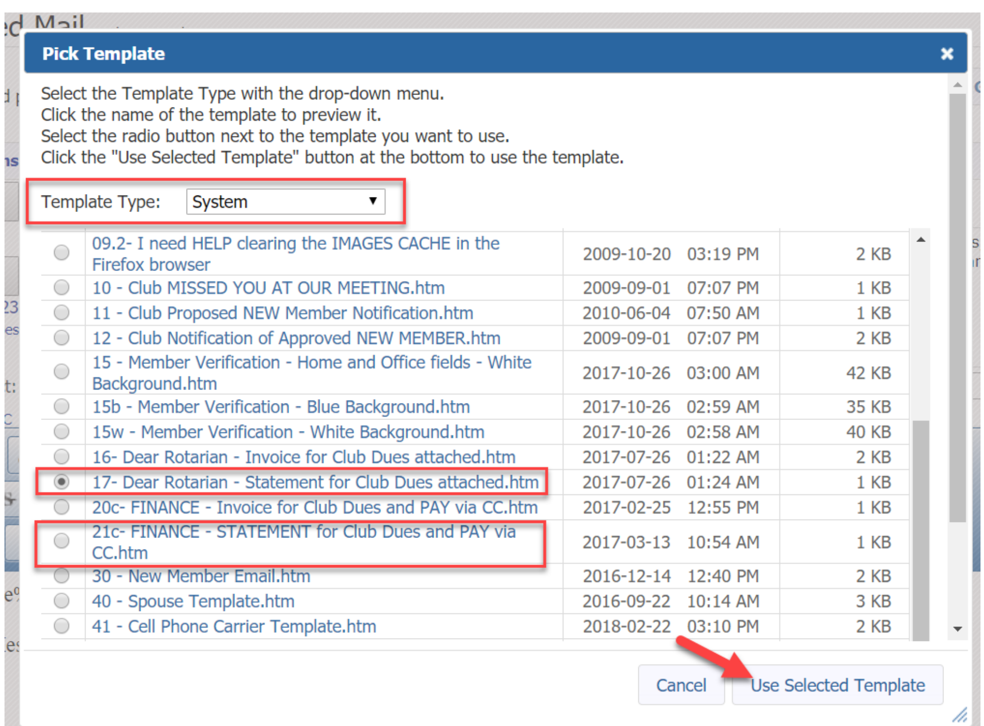
4. **Pmail Statements:** Prior to sending statements, you can preview statements for the selected members by clicking on the “view” computer icon (this is not a necessary step) in the upper right corner. When you are ready, click the Pmail Statements button below the view icon.



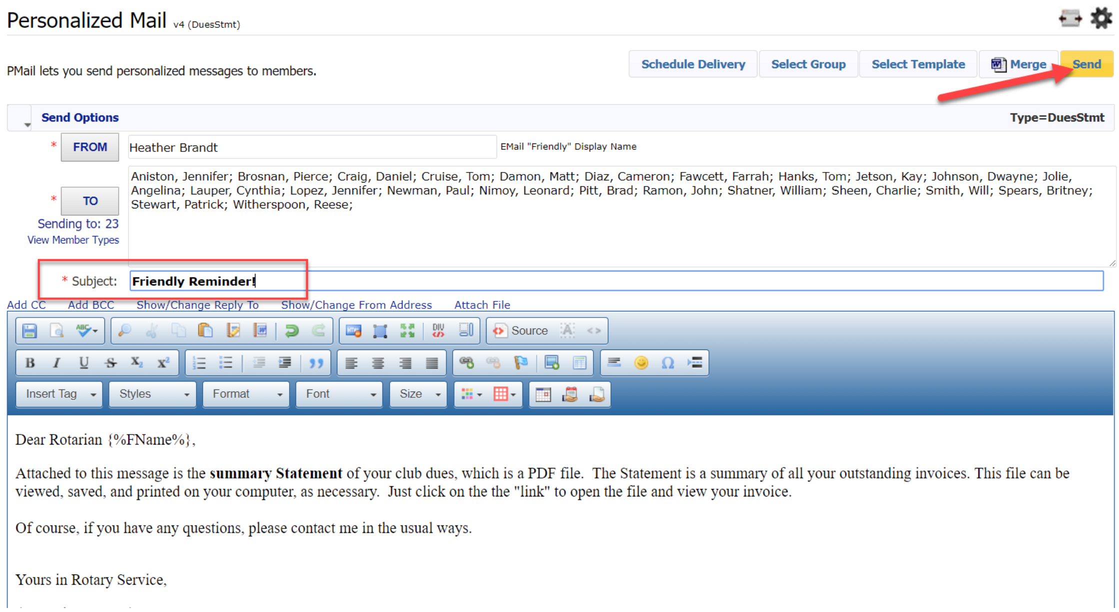
In Pmail, you will see only those members who were selected are listed in the ‘TO’ box.



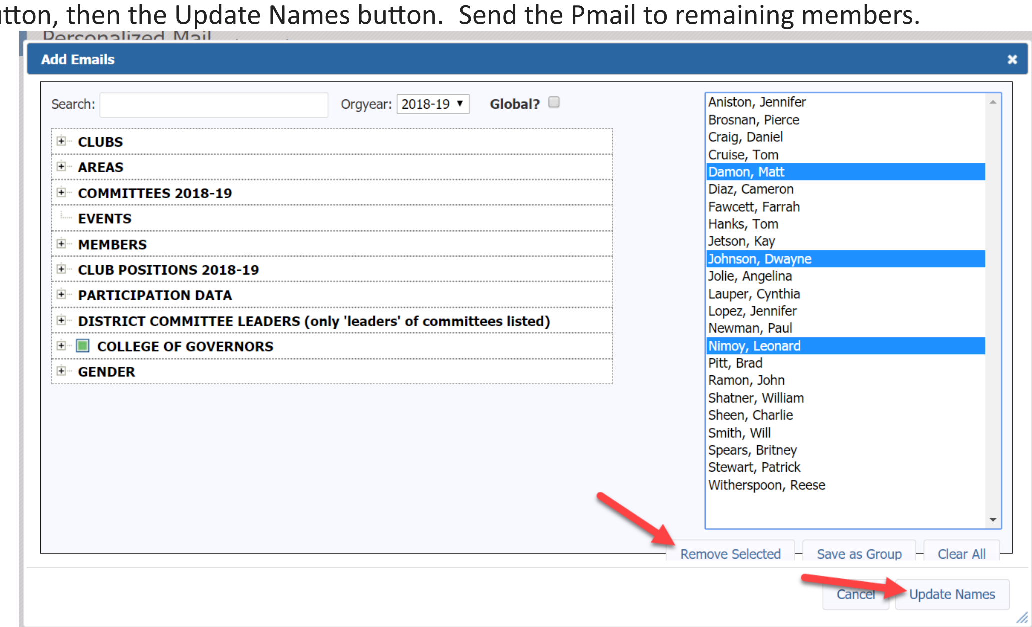
5. **Select Template**: In the upper right corner is a Select Template button. Template Type should be “System.” Click the radio button (little circle to the left of the number) for pmail template #17 if your club is not using credit cards, or #21c if your club is using credit cards, then click the ‘Use Selected Template” button in the lower right corner.



6. Send: Fill in the Subject line and click Send.



Recommendation: If by the next billing cycle you still have members with outstanding balances, generate the invoices and post them as normal. When you go to Pmail, click on the member's names in the "To" section. Highlight the members who are past due (hold down "Ctrl" on your keyboard if multiple) and click the Remove Selected button, then the Update Names button. Send the Pmail to remaining members.



Next, go back to the Finance tab and open the Statements hyperlink. Uncheck all members by unchecking the box in the blue title bar (box is to the left of the words "Member Name"), then go through your list and check only the names of members with an oustanding balance. Once you have them all checked, click on the Pmail Statements button in the upper right and send the Statements to those members.

There has been a lot of feedback from clubs that if you send an invoice and statement at the same time, the member's get confused and they don't know what to pay. This process has proven effective by many clubs.