

Member Billing Getting Started

Member Billing is broken down into four categories:

- **Council/Assembly Ledger** – allows one to Enter, Process and view History of Receipts, Vouchers, Assessments (including Dues and Special assessments) and Adjustments (for the council/assembly – not individual members).
- **Billing Information** – allows one to set up the various Billing Information for the council/assembly – Class List (for Dues Assessments), Account List (Including Reason for Assessment list), and Payor / Payee List.
- **Member Information** – the Member's Ledger and Billing Information.
- **Print Center** – includes Treasurer Reports (Report of Receipts / Vouchers) and Billing Notices (including Membership Cards)

The following outline should assist you in getting started on the new Member Billing application for your council or assembly:

Billing Information - prior to assessing members, Billing Information will need to be set-up for the council/assembly. This section highlights the billing period for the council/assembly, as well as the amount of dues; it also provides the ability to establish a Sub Class and the amount of dues for this Sub Class (for example, Deacon). Included in this section (Under Account List) is the ability to add Reasons for Assessments or Events. Note: a Reason for Assessment is required for any Special or Miscellaneous Assessment.

Member Information - this section highlights the Member's Ledger and Billing Information. Each member who currently owes dues should have their Member Ledger updated to reflect this. Members who should not be assessed, or who belong to an established Sub Class will need to have their Billing Information updated.

Assessments - This is the area to Assess Dues to members, Assess Other (miscellaneous or special assessments) to members, and to Update the Billing Status for members (1st Notice to 2nd Notice, etc). Note that once dues are assessed from the Assess Dues screen, they are put into a Pending Status. Use the Pending Assessment screen to process and post the assessments to the Member's Ledger. Once assessments are processed, the member's Billing Status will be updated to reflect the current status (note, all members are currently set to Not Known).

Receipts - this is the area to process all receipts for the council/assembly. This area includes a Dues Collection Tool for easy recording of dues from members. Again, once processed, all transactions will be put into a Pending Status and must be posted via the Pending Receipts screen. This applies to Vouchers and

Adjustments as well. Note: a Payee / Payor account will need to be created for processing receipts or vouchers for non-members. This can be accomplished via the Payee/ Payor List under Billing Information.

The Membership Cards (located under Billing Notices in the Print Center) require special paper which you may order from the Supreme Council Supply Department using a Requisition Form (#1). There are 8 cards per sheet, and 25 sheets to a package. 2009 cards ordered will be sent at no cost when ordered separately. The Form #'s for the new cards are as follows:

- #4817 – 3rd Degree Membership Cards-Member Billing
- #4818 – 4th Degree Membership Cards-Member Billing

When printing cards, you have the option to print cards for *all* members, (regardless of whether dues are paid up at that time), *or* for just those members who have paid dues during a specific date range. (This feature is especially helpful when new members are added during the year).

The above information should assist you in getting started. Additionally, each screen has a Help link which takes you to an image of the screen with call out boxes to help explain the features of each field.

If additional assistance is needed, please feel free to contact the Supreme Council office using the “Contact Us” link in Member Billing or by calling 203-752-4242.