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.

| | terc- |
|---------------------|---|
| Show: | All Transactions Balance Forward as of last Zero Balance Transactions: From: 07/01/2018 To: |
| Statment Detail: | Summary level Detailed invoice line items |
| Balance of: | 🔵 Any Amount 💿 Any Non Zero Amount 💿 Credit Balance 💿 Zero Balance 💿 Debit Balance |
| For Member: | All Member Active Members Terminated Members |
| Statement Due Date: | Due On Receipt Date: 07/21/2018 |

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 |
| 4 | 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.

| Personalized | Mail v4 (DuesStmt) | | | | | 1 | ⊕ # |
|------------------------|---|---|---|---|---|---------------------------------|-----------------|
| PMail lets you send pe | ersonalized messages to members. | | Schedule Delivery | Select Group | Select Template | 🗑 Merge | Send |
| Send Options | | | | | | Type=D | uesStmt |
| * FROM | Heather Brandt | EMail "Friendly" Display Nam | ne | | | | |
| * TO Sending to: 23 | Aniston, Jennifer; Brosnan, Pierce; Craig, Daniel; Cruise, Tom Angelina; Lauper, Cynthia; Lopez, Jennifer; Newman, Paul; Ni Stewart, Patrick; Witherspoon, Reese; | ; Damon, Matt; Diaz, Ca moy, Leonard; Pitt, Brad | ameron; Fawcett, Farra d; Ramon, John; Shatı | ah; Hanks, Tom; . her, William; Shee | Jetson, Kay; Johnson en, Charlie; Smith, W | , Dwayne; Jo fill; Spears, B | lie, ritney; |

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.

| Pick | Template | | |
|--|---|---------------------|-------|
| Select Click t Select Click t | t the Template Type with the drop-down menu. the name of the template to preview it. t the radio button next to the template you want to use. the "Use Selected Template" button at the bottom to use the te | emplate. | |
| Temp | late Type: System ▼ | | |
| 0 | 09.2- I need HELP clearing the IMAGES CACHE in the Firefox browser | 2009-10-20 03:19 PM | 2 KB |
| | 10 - Club MISSED YOU AT OUR MEETING.htm | 2009-09-01 07:07 PM | 1 KB |
| | 11 - Club Proposed NEW Member Notification.htm | 2010-06-04 07:50 AM | 1 KB |
| | 12 - Club Notification of Approved NEW MEMBER.htm | 2009-09-01 07:07 PM | 2 KB |
| \bigcirc | 15 - Member Verification - Home and Office fields - White Background.htm | 2017-10-26 03:00 AM | 42 KB |
| | 15b - Member Verification - Blue Background.htm | 2017-10-26 02:59 AM | 35 KB |
| | 15w - Member Verification - White Background.htm | 2017-10-26 02:58 AM | 40 KB |
| | 16- Dear Rotarian - Invoice for Club Dues attached.htm | 2017-07-26 01:22 AM | 2 KB |
| ۲ | 17- Dear Rotarian - Statement for Club Dues attached.htm | 2017-07-26 01:24 AM | 1 KB |
| 0 | 20c- FINANCE - Invoice for Club Dues and PAY via CC.htm | 2017-02-25 12:55 PM | 1 KB |
| | 21c- FINANCE - STATEMENT for Club Dues and PAY via CC.htm | 2017-03-13 10:54 AM | 1 KB |
| 0 | 30 - New Member Email.htm | 2016-12-14 12:40 PM | 2 KB |
| | 40 - Spouse Template.htm | 2016-09-22 10:14 AM | 3 KB |
| | 41 - Cell Phone Carrier Template htm | 2018-02-22 03:10 PM | 2 KB |

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

| Personalized Mail v4 (D | uesStmt) | | | | | (· · · · · · · · · · · · · · · · · · · |
|---|--|---|--|--------------------------------------|---|---|
| Mail lets you send personalized m | essages to members. | | Schedule Delivery | Select Group | Select Template | Merge Sence |
| Send Options | | | | | | Type=DuesStm |
| * FROM Heather Bra | ndt | EMail "Friendly" Display Nam | e | | | |
| * TO Sending to: 23 View Member Types | inifer; Brosnan, Pierce; Craig, Daniel; Cruise, Tom; auper, Cynthia; Lopez, Jennifer; Newman, Paul; Nir trick; Witherspoon, Reese; | : Damon, Matt; Diaz, Ca moy, Leonard; Pitt, Brac | meron; Fawcett, Farr I; Ramon, John; Shat | ah; Hanks, Tom; ner, William; She | Jetson, Kay; Johnsor en, Charlie; Smith, V | n, Dwayne; Jolie, Vill; Spears, Britney; |
| * Subject: Friendly R | eminder | | | | | |
| Add BCC Show/Chan | ne kepiy to Show/Change From Address Attach | Source A <> | | | | |
| B I U S X ₂ X ² | ∃ ⊞ ⊒ ⊒)) ≣ ≣ ⊒ ⊒ ®6 ° | 8 📔 🗟 🗐 🗧 | 🥥 Ω 📼 | | | |
| Insert Tag 🔹 Styles 🔹 | Format 🔹 Font 👻 Size 👻 🛄 👻 | 🗐 🖉 🚨 | | | | |
| Dear Rotarian {%FName%}, | | | | | | |
| Attached to this message is th /iewed, saved, and printed on | e summary Statement of your club dues, which your computer, as necessary. Just click on the t | h is a PDF file. The St the "link" to open the f | atement is a summa île and view your in | ry of all your ou voice. | tstanding invoices. | This file can be |
| Of course, if you have any qu | estions, please contact me in the usual ways. | | | | | |
| Yours in Rotary Service, | | | | | | |

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.

| earch: | Orgyear: 2018-19 V Global? | Aniston, Jennifer |
|--|----------------------------|---------------------------------------|
| | | Brosnan, Pierce Craig, Daniel |
| | | Cruise, Tom |
| AREAS | | Damon, Matt |
| COMMITTEES 2018-19 | | Diaz, Cameron |
| EVENTS | | Fawcett, Farrah |
| EVENIS | | Hanks, Tom |
| • MEMBERS | | Jetson, Kay |
| E CLUB POSITIONS 2018-1 | 19 | Jolie, Angelina |
| PARTICIPATION DATA | | Lauper, Cynthia |
| | | Lopez, Jennifer |
| DISTRICT COMMITTEE LEADERS (only 'leaders' of committees listed) | | Newman, Paul |
| E COLLEGE OF GOVERN | ORS | Nimoy, Leonard |
| • GENDER | | Pitt, Brad |
| | | Ramon, John |
| | | Sheen Charlie |
| | | Smith, Will |
| | | Spears, Britney |
| | | Stewart, Patrick |
| | | Witherspoon, Reese |
| | | |
| | | |
| | | |
| | | Remove Selected Save as Group Clear A |

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.