

ChamberMaster Managing Billing

Managing Billing

To make it efficient and easy for you to generate your invoices for recurring billing, your ChamberMaster software tracks:

- Which members need to be billed
- What membership(s) they should be billed for
- How much they should be billed
- When they should be billed
- How they wish to receive their invoice

Managing Membership Renewals

Who needs to be billed...

- ChamberMaster relies on the Membership Fees on a members Account tab to identify who needs to be billed
- All active members who must be billed for membership dues should have a scheduled billing

Membership Fees & Dues

Membership Fees & Dues
Drag fees in the order you want them to appear on the invoices when you run invoice batches and click "Save".

Name	Bill-To Override	Description	Qty	Frequency	Next Billed*	Day Charged	Amount**	<input type="checkbox"/>
New Member Dues		Membership Dues 2022	1	Annually	Mar 2023	N/A	\$700.00	<input type="checkbox"/>

Assign Fee Items **Remove Selected Items**

Managing Membership Renewals

What memberships they need to be billed for...

Membership Fees & Dues

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Drag fees in the order you want them to appear on the invoices when you run invoice batches and click "Save".

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New Member Dues		Membership Dues 2022	1	Annually	Mar 2023	N/A	\$700.00	<input type="checkbox"/>

Assign Fee Items **Remove Selected Items**



Managing Membership Renewals

How much they should be billed...

- The system relies on the information defined by the scheduled on the members Account tab, to determine how much a member should be billed

Membership Fees & Dues

Membership Fees & Dues
Drag fees in the order you want them to appear on the invoices when you run invoice batches and click "Save".

Name	Bill-To Override	Description	Qty	Frequency	Next Billed*	Day Charged	Amount**	<input type="checkbox"/>
New Member Dues		Membership Dues 2022	1	Annually	Mar 2023	N/A	\$700.00	<input type="checkbox"/>

[Assign Fee Items](#) [Remove Selected Items](#)

Managing Membership Renewals

When should they be billed...

- When a membership is first added to a contact, the system will look the frequency at which a member wishes to be billed to determine a “Billed Date”

Membership Fees & Dues

Membership Fees & Dues
Drag fees in the order you want them to appear on the invoices when you run invoice batches and click "Save".

Name	Bill-To Override	Description	Qty	Frequency	Next Billed*	Day Charged	Amount**	<input type="checkbox"/>
New Member Dues		Membership Dues 2022	1	Annually	Mar 2023	N/A	\$700.00	<input type="checkbox"/>

Best Practices

When adding a membership, validate that the next bill date and fee schedule is correct!

Membership Fees & Dues

Membership Fees & Dues
Drag fees in the order you want them to appear on the invoices when you run invoice batches and click "Save".

Name	Bill-To Override	Description	Qty	Frequency	Next Billed*	Day Charged	Amount**	<input type="checkbox"/>
New Member Dues		Membership Dues 2022	1	Annually	Mar 2023	N/A	\$700.00	<input type="checkbox"/>

Assign Fee Items **Remove Selected Items**

Billing Precheck Reports

Ensure all your active members have a recurring fee schedule...

- Use the Custom Member Report.
- Include Annual Fees and Dues Amount to look for any active members without a fee schedule

Print Report Print PDF Create Group

CP - Joins Dues Report					
Company Name	Email	Join Date	Renewal Month	Recurring Fees and Dues List	Annual Fees and Dues Amount
Joe's Fishing Shack	jshack@mailinator.com		-not set-	Gold Membership Package - New: \$231.00 Annually	\$231.00
The Bait Shop	bjohnson@mailinator.com		-not set-		\$0.00
Ruperts Accounting	ruperts@mailinator.com		-not set-		\$0.00
Del'icious	rstanford@mailinator.com		February	Gold Membership Package - New: \$231.00 Annually	\$231.00
Remingtons	sremington@mailinator.com		-not set-	Gold Bundle: \$2,550.00 Annually	\$2,550.00
Lakeshore Marina	lakeshoreinfo@mailinator.com	12/1/2017	-not set-		\$0.00
Pelican Place Marina	nlandgraf@mailinator.com		-not set-	Diamond Membership Package: \$2,200.00 Semi- Annually	\$2,200.00

Billing Precheck Reports

Ensure that you have accurate Billing Contact Information...

- When you assign a membership, you will also assign the billing contact and contact information
- Use the Custom Member report to check that you have billing contacts for all active members

Print Report Print PDF Create Group

Member Listing

Company Name	Billing Contact	Billing Email	Billing Address 1	Billing Address 2	Billing City	Billing State	Billing Zip	Annual Fees and Dues Amour
The Treehouse	Max Louis	tree@mailinator.com			Crosby	OK	73401	\$1,200.00
Pick n' Save	Wendy Trocchio	laura@mailinator.com	21748 S Raider Court		Crosby	OK	73401	\$0.00
Joe's Fishing Shack	Joe Schmoe	jshack@mailinator.com				MN		\$231.00
The Bait Shop	Johnny Jones					MN		\$0.00
Ruperts Accounting	Harry Ruppert	ruperts@mailinator.com				MN		\$0.00
Deli'cious	Rachel Stanford	rstanford@mailinator.com	123 4th Street		Crosby	MN	56441	\$231.00
Remingtons	Erik Remington		1234 East Street		Crosby	MN	56441	\$2,550.00
Lakeshore Marina	Joe Hanson	deanh@mailinator.com				MN	56441	\$0.00
The Ritz	Tim Piepkorn	tpiepkorn@mailinator.com	12587 Main Street		Deerwood	MN	56444	\$1,400.00
Pelican Place Marina	Nancy Landgraf	nlandgraf@mailinator.com	1254 Main Street		Pequot Lakes	MN	56472	\$2,200.00

Send Notifications

Notification letters may be sent prior to the member billing month thanking them for their membership and notifying them that their membership dues will soon be billed

KB: Notification Letters

Dear Brandon, Updated

Thank you for your partnership with the CMMZ Training Site over the last year! With your membership renewal coming up, we'd love to share how we can help your business grow and connect with our members. We're excited about all the opportunities we can offer to you. Have you fully utilized these benefits?

- **Online Informational Brochure** - your own page on CMMZ Training Site's website which can include your business description, hours of operation, location information, and up to eight keywords (these help identify your business when a website visitor does a keyword search on the Business Directory)
- **Job Postings**– add your own job openings to CMMZ Training Site's website
- **Hot Deals** – include store coupons and special offers on CMMZ Training Site's website
- **Event Posting** - add your business' events to CMMZ Training Site's Online Events Calendar – CMMZ Training Site website visitors can add your event to Outlook, e-mail the details to a friend and request an automatically generated email reminder for your event

Please keep an eye out for a renewal notice next month. We can't wait to hear from you.

Thank you for being part of the CMMZ Training Site and helping to support our community!

Sincerely,

CMMZ Training Site
4567 Main Street
Crosby, MN 56441
2185465413
cheri.petterson@growthzone.com
<http://v9training.smartcms.site/>

Creating Batches

KB: Create Batch of Recurring Invoices

Uncreated Invoices

Switch to a different month to see outstanding invoices for another month. Recurring and Group batches below display outstanding invoices only for the month selected. Event and One-time fees are not specific to a particular month; they will always display here until created or cleared. Note: only active members are include in the recurring invoices quantity. If you bill members with other statuses, the Task List will not include those in the count. Set your default month under Setup->Billing Options and Settings.

Assigned fees for:

Recurring Fees Batches			
Batch Group	epayments	Pending	Action
Default	Yes	1	view this month's pending auto-charges
Default	No	8	create invoices

Creating Batches

- Task List will alert to needed invoices
- Billing Solution Setting: # of months to look ahead for

Billing Solution

Default member record where **non-member** invoices/receipts will be assigned for purchases: [Non-Member Transactions](#)

of months to look ahead for:

task list invoice count: ?

Sales Tax Rate:

Payment Deposit Account: (Undeposited Funds) (used when receiving Payments and Sales Receipts)

Bank Deposit Account: (used when making Deposits)

Task List	
3	Mbr Signups
0	Hot Deals
0	MarketSpace
0	News Releases
0	New Events
0	Job Postings
0	Pub. Requests
1	Reminders
0	Mbr Payments
6	Invoices
0	Web Leads

Creating Batches

- Click Invoices in Task List to view uncreated invoices

Uncreated Invoices

Switch to a different month to see outstanding invoices for another month. Recurring and Group batches below display outstanding invoices only for the month selected. Event and One-time fees are not specific to a particular month; they will always display here until created or cleared. Note: only active members are include in the recurring invoices quantity. If you bill members with other statuses, the Task List will not include those in the count. Set your default month under Setup->Billing Options and Settings.

Assigned fees for: [Refresh](#)

Recurring Fees Batches				
Batch Group	epayments	Pending	Action	
Default	No	1	create invoices	
Default	Yes	1	create invoices	

One-Time Fees				
Batch Group	epayment	Pending	Action	
Default	No	1	create invoices	

Creating Batches

- When creating invoices – note if *Match Found* is displayed
- This indicates that some or all of the invoices have already been batched
- If there are un-batched invoices – click New Batch!

Billing

Billing Center Invoices Sales Receipts Payments Credits Statements Reports Deposits

Create Invoices

Batch Type: Monthly Renewal
 Billing Month: March
 A/R Account: Default Accounts Receivable
 Invoice Group: Default

Bill To: All [Active](#) members with amounts due in the month of **March 2019**.
 Invoice Date: 12/4/2018
 Invoice Number: 1039
 P.O. Number:
 Date Due: 3/1/2019
 Message: Thank You
 Payment Terms: Due on Receiv
 Default Class:

Match Found This invoice batch is marked as ready for delivery.
 Batch Name: Membership Dues for March 2019
 Sort By: Member Nar

This saved batch excludes **1 members** eligible for invoicing in this month.

Creating Batches

- Output Options
- Save Batch/Deliver Invoices

Invoices in Batch						
<input type="checkbox"/>	Output	Member Name	Invoice Items	Status	Tax	Amount
<input type="checkbox"/>	printed: 12/4/2018 emailed: 12/4/2018	Fursts	\$5.00 Test Deferred	Ref #: 1039 Date: 12/4/2018	Non	5.00
	Print ▼ emailed: 12/4/2018	Go Bucks	\$333.34 New Membership Fee	Ref #: 1040 Date: 12/4/2018	Non	333.34
	Both ▼	GWP Designs	\$1250.00 Gold Membership	Ref #: 1045 Date: 12/4/2018	Non	1250.00
	printed: 12/4/2018 emailed: 12/4/2018	International Art Gallery	\$333.33 New Membership Fee	Ref #: 1041 Date: 12/4/2018	Non	333.33
	Print ▼ emailed: 12/4/2018	Money Money	\$100.00 Emerald Membership Fee Item	Ref #: 1042 Date: 12/4/2018	Non	100.00
	Email ▼ printed: 12/4/2018	Sean's Beachcomber Tiki Bar	\$333.33 New Membership Fee	Ref #: 1043 Date: 12/4/2018	Non	333.33
	printed: 12/4/2018 emailed: 12/4/2018	Ty's Shoes	\$50.00 Membership Dues	Ref #: 1044 Date: 12/4/2018	Non	50.00
<input type="checkbox"/>	Print ▼	The Beauty Shop	\$120.00 12 month test	Last Ref #: 1094 Date: 2/26/2019	Non	120.00

0 Invoices Selected

Set all output options to:

Set all sales tax options to:

Exclude Voluntary Fees

[Print List](#) [Download List](#)

Subtotal: 0.00
Sales Tax: 0.00
Total Amount: 0.00

[Save Batch](#) [Deliver Invoices](#) [New Batch](#) [Delete Batch](#)

Redeliver Invoice Batches

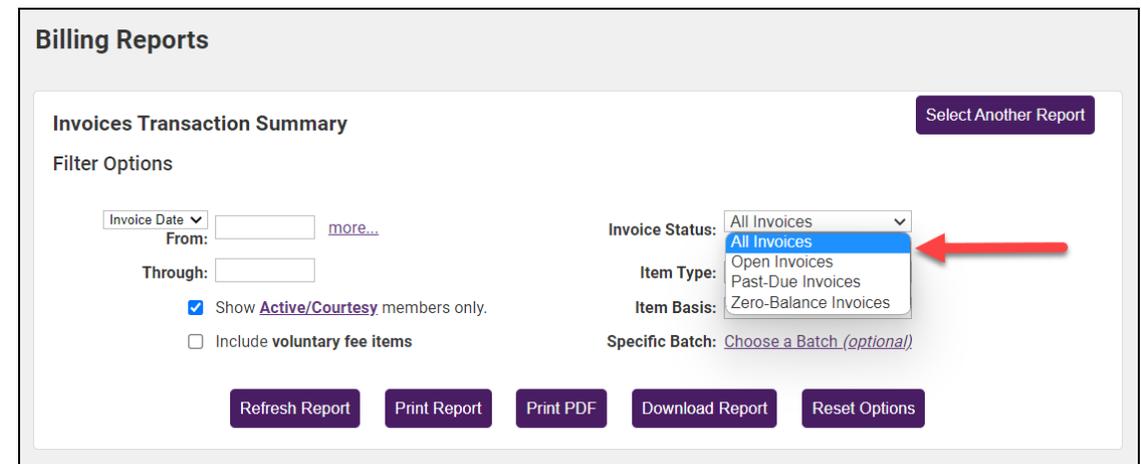
- Find overdue invoices and resend
- Invoice Summary Report
 - View all open and past due invoices
 - Specify date range
 - Resend overdue invoices directly from report

The screenshot displays the 'Billing Reports' section of a software interface. It features a navigation bar with tabs for 'Billing Center', 'Invoices', 'Sales Receipts', 'Payments', 'Credits', 'Statements', 'Reports', and 'Deposits'. The 'Reports' tab is active, showing the 'Invoices Transaction Summary' report. The report includes filter options for 'Invoice Date' (From: 2/1/2021, Through: 2/23/2021), 'Invoice Status' (All Invoices), 'Item Type', and 'Item Basis'. There are checkboxes for 'Show Active/Courtesy members only' and 'Include voluntary fee items'. Action buttons include 'Refresh Report', 'Print Report', 'Print PDF', 'Download Report', and 'Reset Options'. Below the filters is an 'Invoice Listing' table with columns for Date, Ref #, Member, Description, Due Date, Paid Date, Amount, and Balance. A 'Generate Report' button is positioned above the table. At the bottom, there is a 'Resend Invoices' button and a timestamp: 'Report Generated 2/22/2021 at 12:17 PM'.

Date	Ref #	Member	Description	Due Date	Paid Date	Amount	Balance
Totals						0.00	0.00

Invoice Summary Report

- View all invoices, open invoices, past due invoices or invoices with a zero balance, in a certain date range
- Resend overdue invoices directly from report
- KB: [Invoice Summary Report](#)



The screenshot displays the 'Billing Reports' interface. At the top, it says 'Invoices Transaction Summary' with a 'Select Another Report' button. Below this is the 'Filter Options' section. On the left, there are input fields for 'Invoice Date' (with a dropdown arrow), 'From:', and 'Through:'. A 'more...' link is next to the 'From:' field. There are two checkboxes: one checked for 'Show Active/Courtesy members only.' and one unchecked for 'Include voluntary fee items'. On the right, there are three dropdown menus: 'Invoice Status:' (with 'All Invoices' selected and highlighted by a red arrow), 'Item Type:', and 'Item Basis:'. Below these are 'Specific Batch:' and a link 'Choose a Batch (optional)'. At the bottom, there are five buttons: 'Refresh Report', 'Print Report', 'Print PDF', 'Download Report', and 'Reset Options'.

Create an Invoice

- Most invoices will be created in batches
- May need to create a single one-off invoice
- Can be created within Billing Center or in a member's Account tab
- KB: Create One-Off Invoice

Batch Type: Individual Member ⓘ A/R Account: Accounts Receivable

Bill To: Diephouse Realty
Sarah Samuels
123 4th Street
Kalamazoo, MI 49008 edit

Invoice Date: 12/16/2023
Invoice Number: 884 🔍
P.O. Number:
Date Due: 12/16/2023
Payment Terms: Due on receipt

Message: Staff App edit
Sales Tax:
Notes/Memo:
Default Class:

Allow member to pay this invoice online

Edit Revenue Recognition ⓘ

Item Name	Description	Class	Price Each	Qty	Sales Tax	Amount
Bronze Membership (Memb	Membership dues for Bronze		800	1	Non	800.00
Enhanced Directory	Fee for adding Enhanced Dir		200	1	Non	200.00
Membership Setup	One time fee assessed at the		30	1	Non	30.00
			0.00	1		0.00
			0.00	1		0.00
			0.00	1		0.00
			0.00	1		0.00
			0.00	1		0.00

Invoice is marked to be Printed Save and Print
 Invoice is marked to be Emailed Save and Email Apply Credits

Subtotal: 1030.00
Sales Tax: 0.00
Total Amount: 1030.00

Save Close

Create a Sales Receipt

- Sales Receipt should only be created for items not previously invoiced
 - If invoice already created but payment recorded with Sales Receipt, will result in a duplicate payment record
- Sales Receipt Summary Report
 - Displays Sales Receipt transactions
- KB: [Create Sales Receipt](#)

Member Information

Company Name: Pitt's Chemical	Mbr Status: Active
Primary Phone: (701) 555-7789	Join Date: 8/1/2022
Fax Number:	Drop Date:
Email Address: pittschemical@mailinator.com	Full-Time: 0
Chamber Rep:	Part-Time: 0
Member Type: Platinum	
Billing Contact: Marvin Caine	
PO Box 80	
Minnewakan, ND 58351	
(701) 555-7789	

[New Invoice](#) [New Sales Receipt](#) [New Payment](#) [New Credit](#) [Apply Credit](#)

Accept Payments

- Can enter a payment in one of three locations when received
 - Billing Center tab
 - Payments tab in the Billing module
 - Account tab in Members module
- KB: Process Payments

Deposit To: (Undeposited Funds)

Received From: Espresso Drive Thru
Michelle Scanlan
312 Coffee Bean Dri
Lattetown, WI 54545

Member Balance: 1700.00

Payment Amount: 0.00
Payment Date: 4/20/2018
Reference #:
Payment Method: Check

Notes / Memo:

Outstanding Invoices: Select the invoice(s) to which the payment applies.

Date	Ref #	Line Items	Orig. Amt	Amt Due	Payment
12/13/2017	21	Gold Membership Package	1000.00	1000.00	0.00
2/20/2018	128	1/4 Page Ad in Chamber Magazine	100.00	100.00	0.00
3/26/2018	146	Gold Membership Package	600.00	600.00	0.00
Total			1700.00	1700.00	0.00

Payment Total: 0.00
Payment Applied: 0.00
Available Amount: 0.00
Credits/Discounts: 0.00

Save Close

Create Credits

- Created for member ahead of time or created when receiving payment
- Do not have to be associated with a particular invoice when created
- Can be done using any Fee Item that exists on your Fee Items list
- KB: Process Credits

A/R Account: Accounts Receivable

Sold To: Janee's Messy Table
Janee Auten
555 Foody Lane
Somewhere, OK 55555

edit

Credit Amount: 0.00
Credit Date: 4/20/2018
Credit Number: 5
P.O. Number:

Message: edit

Notes:

Outstanding Invoices: Select the invoice(s) to which the credit applies.

Date	Ref #	Line Items	Orig. Amt	Amt Due	Credit
12/13/2017	33	Gold Membership Package	1000.00	990.00	0.00
Total			1000.00	990.00	0.00

Available Amount: 0.00
Assigned Item:

Member Balance: 990.00
Credit Applied: 0.00

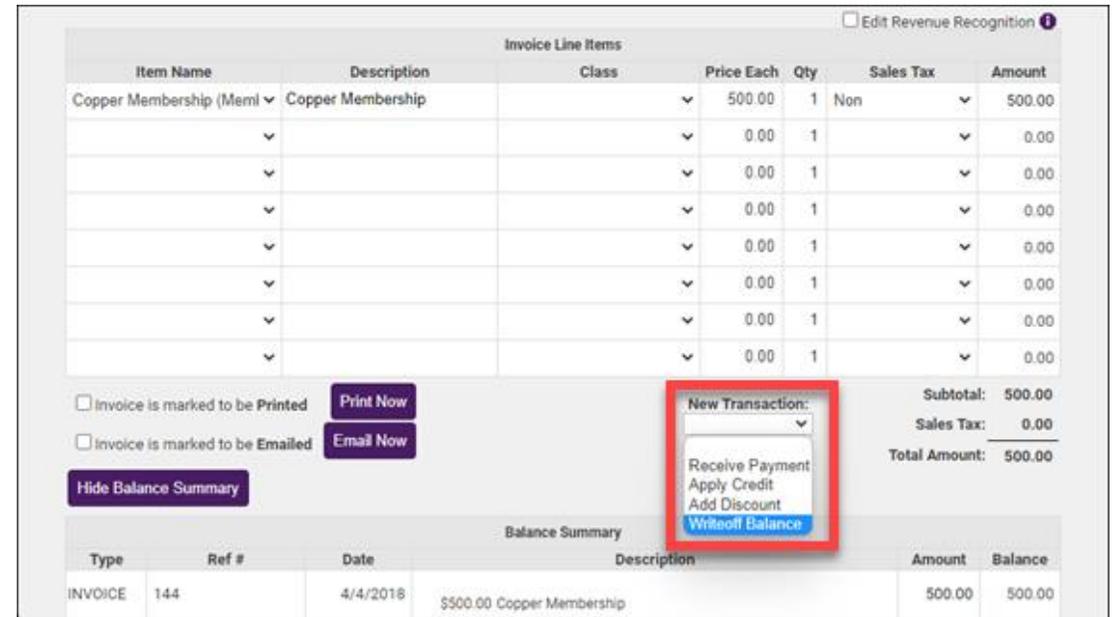
Credit is marked to be Printed **Print Now**

Credit is marked to be Emailed **Email Now**

Save **Close**

Write-Off Balance

- Can write-off balance if a member does not pay
 - Useful for years-old invoices
- Can also write-off balance when dropping members with the Mass Drop feature
- KB: Process Write Offs
- KB: Mass Drop/Mass Write-Off



The screenshot displays an invoice management interface. At the top right, there is a checkbox for 'Edit Revenue Recognition'. Below this is a table of 'Invoice Line Items' with columns for Item Name, Description, Class, Price Each, Qty, Sales Tax, and Amount. The first row shows 'Copper Membership (Meml)' with a price of 500.00 and a quantity of 1. Below the table are several buttons: 'Print Now', 'Email Now', and 'Hide Balance Summary'. A 'New Transaction:' dropdown menu is open, showing options: 'Receive Payment', 'Apply Credit', 'Add Discount', and 'Writeoff Balance' (which is highlighted in blue). To the right of the dropdown, the 'Subtotal' is 500.00, 'Sales Tax' is 0.00, and 'Total Amount' is 500.00. At the bottom, there is a 'Balance Summary' table with columns for Type, Ref #, Date, Description, Amount, and Balance. The first row shows 'INVOICE' with Ref # 144, Date 4/4/2018, Description '\$500.00 Copper Membership', Amount 500.00, and Balance 500.00.

Item Name	Description	Class	Price Each	Qty	Sales Tax	Amount
Copper Membership (Meml)	Copper Membership		500.00	1	Non	500.00
			0.00	1		0.00
			0.00	1		0.00
			0.00	1		0.00
			0.00	1		0.00
			0.00	1		0.00
			0.00	1		0.00
			0.00	1		0.00

Type	Ref #	Date	Description	Amount	Balance
INVOICE	144	4/4/2018	\$500.00 Copper Membership	500.00	500.00

Send Thank You Letters

- Thank You Letter Report
 - Can be generated for those members who have paid their invoices
 - Once generated, easily send Thank You letters via email or print
- KB: Send Thank You Letters

Dear Ace Hardware,

Thank you for your involvement with the Kalamazoo Area Chamber! We appreciate your partnership with us and look forward to another great year together. Remember to take advantage of excellent opportunities for your business to attract new customers and share information with our community and the world.

Log in today to update your information and take advantage of these features!

- **Online Informational Brochure** - your own page on the chamber's website which can include your business description, hours of operation, location information, and up to eight keywords (these help identify your business when a website visitor does a keyword search on the Business Directory)
- **Job Postings** - add your own job openings to the Chamber's website
- **Hot Deals** - include store coupons and special offers on the Chamber's website
- **Event Posting** - add your business' events to the Chamber's Online Events Calendar - chamber website visitors can add your event to Outlook, e-mail the details to a friend and request an automatically generated email reminder for your event

Enter the login name and password found below to gain access to all of these features, update your information and more at www.chamberlogin.com.

Your login name is: dorothy

Your password is: Forgot password? Click here -

<http://susantraining3.chambermaster.com/login/forgotpwd>

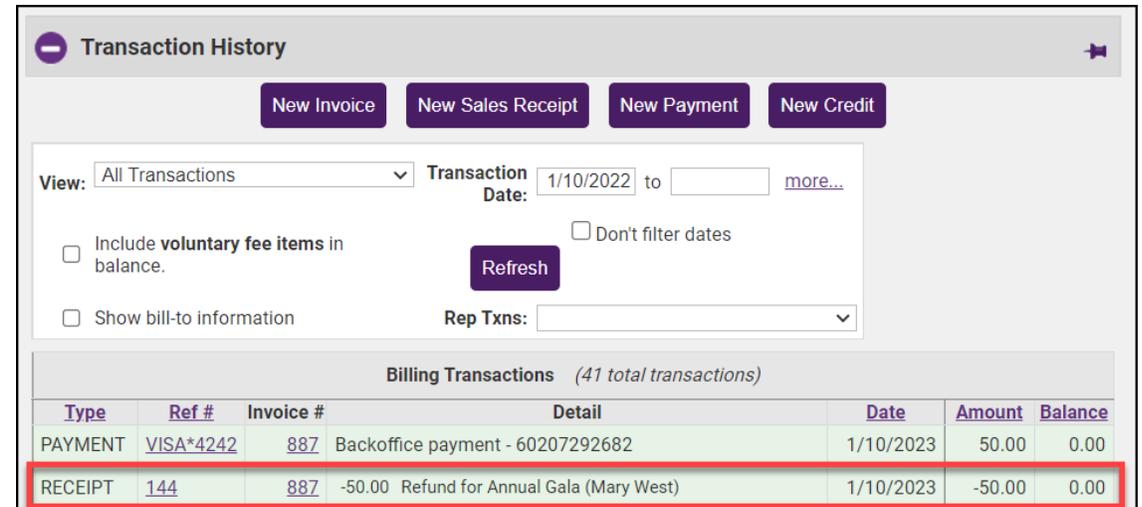
Sincerely,

Kalamazoo Area Chamber
1903 W. Michigan Ave.
Kalamazoo, MI 49008
555-555-5555
kalamazoochambennfo@mailinator.com
<http://minnewaukan.smartcms.site/>



Process Refunds

- Process for creating a refund will vary, dependent on the processor used, and on whether the payment was received against an invoice or a receipt
- KB: Manage Refunds



The screenshot shows a 'Transaction History' interface. At the top, there are buttons for 'New Invoice', 'New Sales Receipt', 'New Payment', and 'New Credit'. Below these are filters for 'View' (set to 'All Transactions'), 'Transaction Date' (1/10/2022 to [blank]), and a 'Refresh' button. There are also checkboxes for 'Include voluntary fee items in balance' and 'Show bill-to information', and a 'Rep Txns' dropdown. The main table is titled 'Billing Transactions (41 total transactions)'. The table has columns for Type, Ref #, Invoice #, Detail, Date, Amount, and Balance. Two rows are visible: a 'PAYMENT' of 50.00 and a 'RECEIPT' of -50.00, both dated 1/10/2023. The receipt row is highlighted with a red border.

Type	Ref #	Invoice #	Detail	Date	Amount	Balance
PAYMENT	VISA*4242	887	Backoffice payment - 60207292682	1/10/2023	50.00	0.00
RECEIPT	144	887	-50.00 Refund for Annual Gala (Mary West)	1/10/2023	-50.00	0.00

Billing Reports

- A/R Details Report
- Recurring Revenue Report (Membership Renewal)
- Batch/Invoice Summary
- Past Due Members/Mass Drop

A/R Aging Detail Report

- Detailed information on aging customer accounts
 - Includes individual transactions
- Can be used by collections personnel
 - Determine which invoices overdue
- Accounts Receivable Aging Summary report
- KB: Accounts Receivable Aging Detail

Billing Reports

A/R Aging Detail

Select Another Report

Filter Options

Report Date: Item Type:

Interval: days Item Basis:

Report Through: days past due A/R Account:

Specific Batch: [Choose a Batch \(optional\)](#)

Show invoices with only unpaid **voluntary fee** items. Show **Active/Courtesy** members only.

Include **voluntary fee** items in balance. Show **line items** in report.

Don't show **payments** in report.

Membership Renewal Report

The **Membership Renewals report** will provide you with a list of Scheduled Billing configured for your members.

This report can be used to view expected revenue based on the schedules and can be generated for a specified date range, or a specific Renewal Month.

KB: [Membership Renewal Report](#)

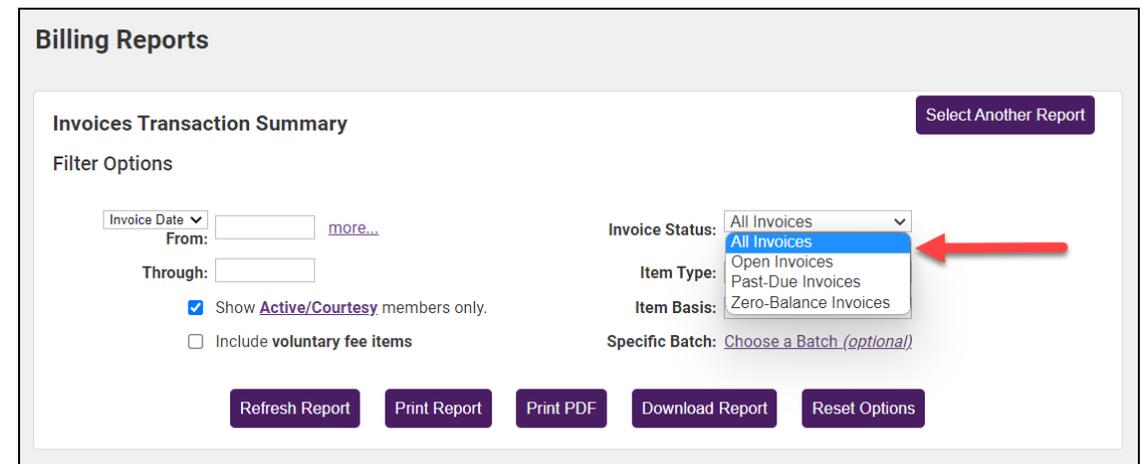
Membership Renewals for January					
Member Name	Status	Membership Type	Join Date	Scheduled Items	Scheduled Total
A Place for Dogs	Active	Large Corporate	3/21/2017	\$144.00 Corporate Membership	12.00
Alex Race Track Events LLC	Active	Diamond Membership	7/31/2018	\$500.00 Small Business Membership	41.67
Barry's Boats	Active	Diamond Membership	4/29/2017	\$792.00 New Member Dues	66.00
Carroll Boutique	Active			\$500.00 Small Business Membership	41.67
Fayette Store	Active	Gold Membership	8/27/2019	\$144.00 Corporate Membership \$500.00 Small Business Membership	644.00
Hannah's	Active			\$200.00 New Member Dues	200.00
Herb's Herb House	Active	Diamond Membership	10/5/2022	\$144.00 Corporate Membership	144.00
Ice House	Active	Gold Membership	6/6/2017	\$144.00 Corporate Membership	144.00
Kelly's Jewels	Active	Small Business	1/17/2023	\$1200.00 Small Business Membership	100.00

Invoice Summary Report

View all invoices, open invoices, past due invoices or invoices with a zero balance, in a certain date range

Resend overdue invoices directly from report

KB: [Invoice Summary Report](#)



The screenshot displays the 'Billing Reports' section of a software interface. The main heading is 'Invoices Transaction Summary', with a 'Select Another Report' button to its right. Below this is the 'Filter Options' section. On the left, there are input fields for 'Invoice Date' (with a dropdown arrow), 'From:', and 'Through:', along with a 'more...' link. There are two checkboxes: one checked for 'Show Active/Courtesy members only.' and one unchecked for 'Include voluntary fee items'. On the right, there are three dropdown menus: 'Invoice Status:' (with a red arrow pointing to the 'All Invoices' option), 'Item Type:', and 'Item Basis:'. Below these are 'Specific Batch:' with a link 'Choose a Batch (optional!)' and five buttons: 'Refresh Report', 'Print Report', 'Print PDF', 'Download Report', and 'Reset Options'.

Past Due Members/Mass Drop

Use the **Mass Drop/Write Off** report to see a list of all members with overdue membership fees and dues.

KB: [Mass Drop/Write Off](#)

The screenshot displays the Chambermaster PRO software interface. On the left is a dark sidebar with a navigation menu including: Dashboard, Members, Groups, Communication, Events, Jobs, Advertising, MarketSpace, News Releases, Info Request, Billing (highlighted), Reports, Cloud Drive, Form Builder, eCommerce, Project/Task, Setup, Account, Training, and Support Help/Wiki. The main content area is titled 'Billing' and contains sub-tabs for Billing Center, Invoices, Sales Receipts, Payments, Credits, Statements, Reports, and Deposits. The 'Reports' tab is active, showing 'Billing Reports'. The 'Mass Drop/Write-off' report is selected, with a 'Select Another Report' button in the top right. Below this are 'Filter Options' and 'Drop/Write-Off Options'. The 'Filter Options' section includes dropdowns for Membership Status, Membership Type, and Item Type, along with 'Invoice Due Date From' and 'Through' date pickers. The 'Drop/Write-Off Options' section features a 'Type of Update' dropdown menu with a red box around it, containing the options 'Drop & Write-off', 'Drop Only', and 'Write-off Only'. Other options include 'Drop Date', 'Drop Reason', 'Drop Comments', and 'Write-off Date' (set to 4/28/2023). There are also checkboxes for 'Include voluntary items' and 'Disable rep(s) in group(s)'. At the bottom of the report configuration area are five buttons: Refresh Report, Print Report, Print PDF, Download Report, and Drop & Write-off Selected Members.

Past Due Members/Mass Drop

Make note of any members with an asterisk next to their name. This indicates the member has unapplied payments or credits that need to be addressed before continuing with the drop/write-off process.

<input checked="" type="checkbox"/>	Trailwind Village Apartmen...			0.00		Active		111	6345.80	1868.60	view invoices	<input type="text"/>
<input type="checkbox"/>	* Universal Cooperatives, I...		1000.00	10/29/2018		Active		230	2458.60	1868.60	view invoices	<input type="text"/>
<input checked="" type="checkbox"/>	V F W Post 8218			0.00		Active		230	3008.60	1868.60	view invoices	<input type="text"/>
<input checked="" type="checkbox"/>	Vince's TV & Appliance			0.00		Active		93	8214.40	1868.60	view invoices	<input type="text"/>
<input checked="" type="checkbox"/>	Welles Bowen Realty			0.00		Active	Rose	93	8294.40	1868.60	view invoices	<input type="text"/>
<input checked="" type="checkbox"/>	Wendt Shoes			0.00		Active		230	3008.60	1868.60	view invoices	<input type="text"/>
<input checked="" type="checkbox"/>	Wide Water Retreat & Mini...			0.00		Active		93	6295.80	1868.60	view invoices	<input type="text"/>
<input checked="" type="checkbox"/>	Zachrich Transportation, In...			0.00		Active		111	6345.80	1868.60	view invoices	<input type="text"/>
Total: 156 members									908324.42	293406.11		

*This member has un-applied payments or credits that need to be cleaned up before you can drop them and write-off their balance.

KB: Mass Drop/Write Off