Email or print an invoice for a Group Payment

1. Create a member record containing the email address to which you will send the invoice.

(The member name may either be a member's name or a company name.)

2. Click Billing/ Process Group Payments.

3. Enter the latest due date for the group, or enter the last day of the month.

4. a) Under "Plan Types" select the membership plan for the group

b) leave the "due date" field as is.

c) If dependent members should not be billed "member Flags" field should contain "Is not dependent member".

5. Click "Generate List" on bottom right corner.

6. On the next page titled "Batch Payment List" click "Continue" on bottom right corner.

7. On the next page titled "Process Group Payment" click OK.

8. On the next page titled "Group Payment"

9. a) click "Set Responsible Party" to select the person you will be mailing this invoice to.

10. b) Click "View Invoice" to review the invoice.

11. c) Click email invoice. You may change the subject of the email. Click OK.

12. DO NOT click "Process Payment" or "Record Payment" if you are merely sending an email.

13. Click CLOSE.

14. You are done.