Online Member Statements & Payments

2016 - Winter Edition

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Overview

Online Member Statements and Payments allow members to view **statement** data and **pay** for **statements online**. It also allows Administrators to view and help troubleshoot Member statements and payments.

Use Case(s)

Online Member Statements and Payments are used to handle **monthly billing** at the club for dues and for other items or services purchased at the club.

Accessing the Tool

Online Member Statements and Payments may be located in several places on the website. The most common placement is in the **Quicklinks** on the member home page, which is usually titled **Online Statement, Member Statement**, or **My Statement**.
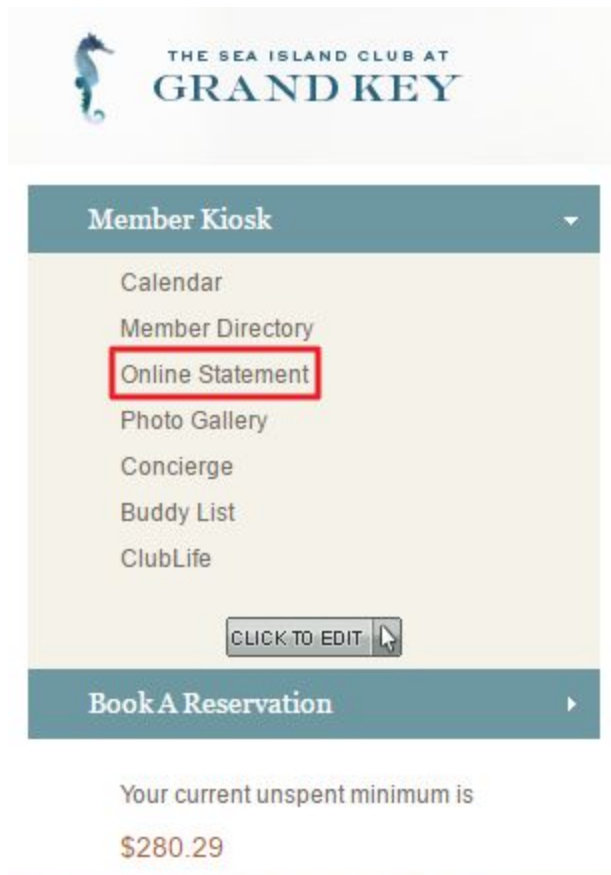
Many clubs also have a link located in the **main navigation bar** under **My Club**, or another navigational item that was determined during the site build.

Click the **online member statement link** to open the **statement window**.
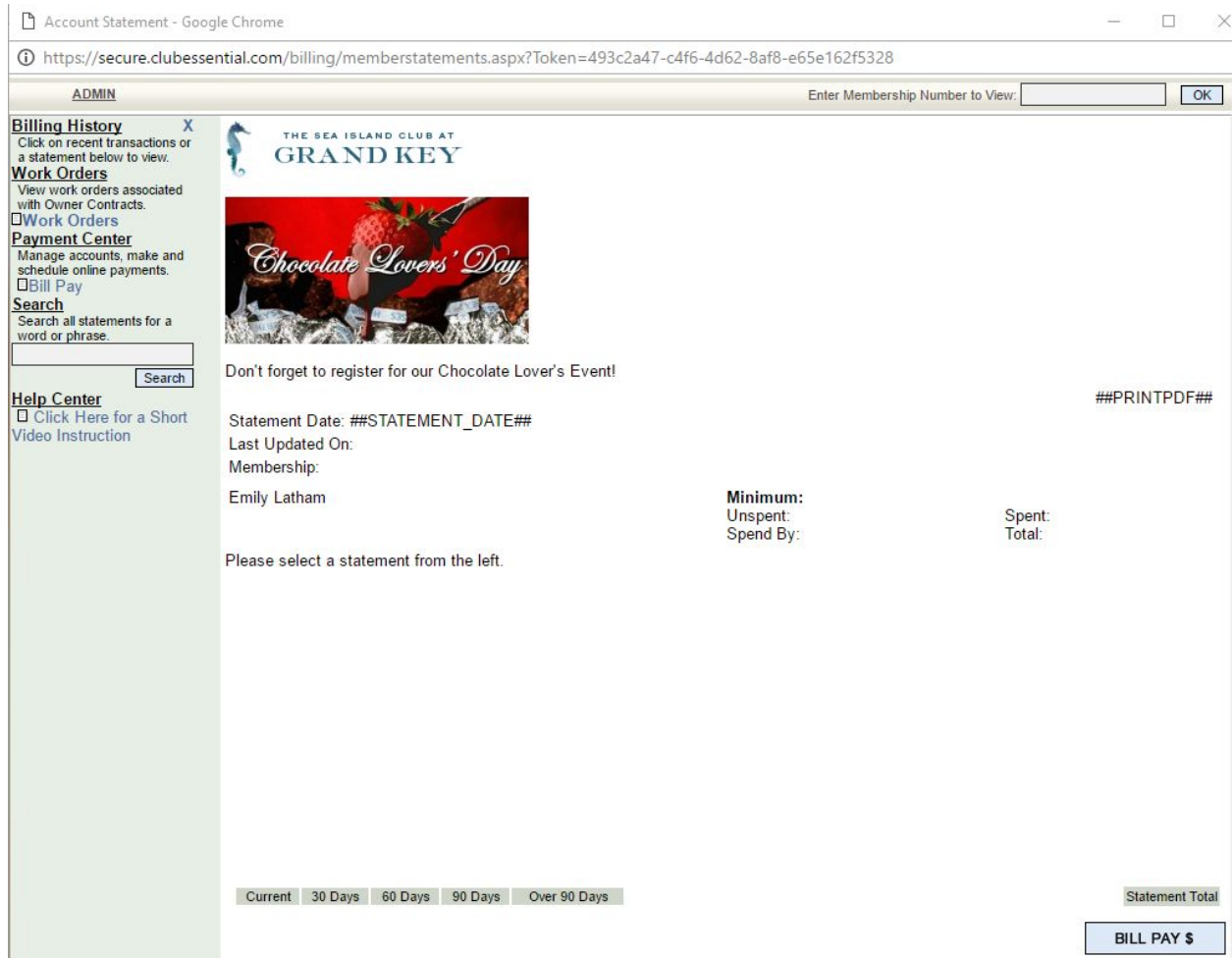
To view a **member's statement**, type the **member number** in the **search box** of the statement and **click go**. (Note, in rare instances where a Member is not seeing what you are seeing in this view, Impersonate the Member, and then view the Payments/Statements as that Member instead of entering the Membership number to help troubleshoot.)

This will launch the member's **current statement**.

You may access **past months history** by **clicking** on the **month links** on the left hand side.

Click Bill Pay on the left hand side beneath **Payment Center** to view **scheduled payments**.

The **Bill Pay** button at the bottom right hand of the interface will also launch the **scheduled payments interface.**

If the member has a bank account or credit card associated with the account, you will be able to **view** their **billing information**.

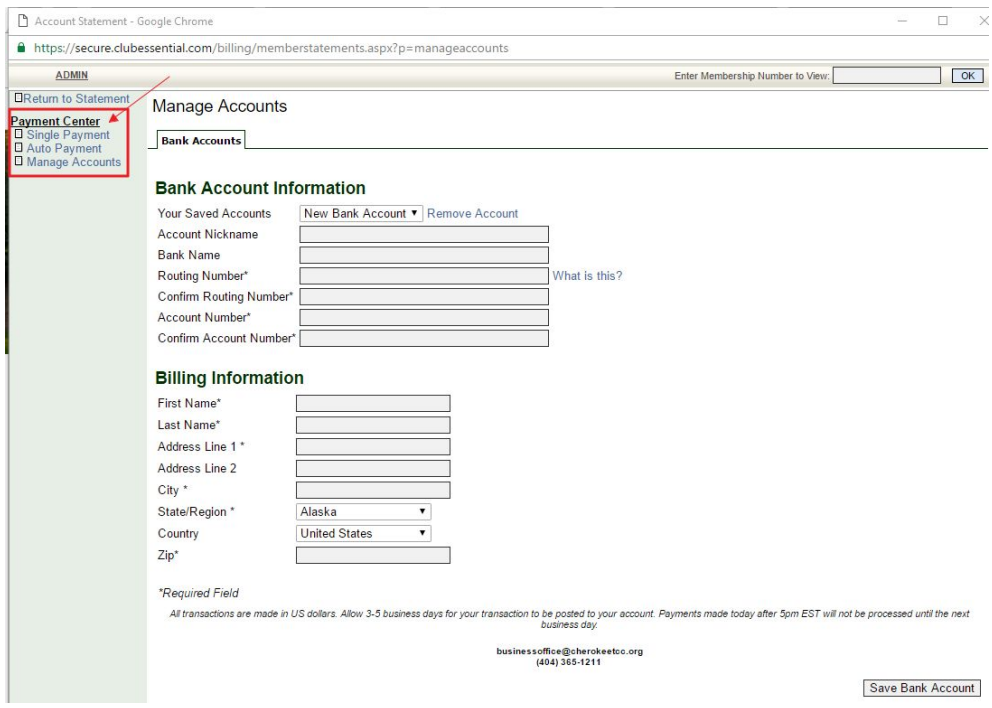The **Payment Center** on the interface allows management for a **Single Payment (one-time), Auto Payment (recurring), or to Manage Accounts.**

Admin Bar Options

Hover over the **Admin bar** for more options: **Statement Admin Options** and **Online Payments Admin Options.**

Member Balance Reporting will pull a list of members with their **balance due** listed for a selected date range.

Change the date by clicking the date picker and then click refresh.

Member Minimum Reporting lists how close members are to meeting their minimum. ***Note:*** this is custom dependent on the type of accounting software the club is utilizing, therefore not all clubs will have this reporting tool.

- Change the date by clicking the date picker and then click refresh.

Edit Statement Layout will change how certain items will appear in the statement window.

Hover over the **Admin** bar again in the **Edit Statement Layout** to access further customization like **Edit Statement Header or Footer**.
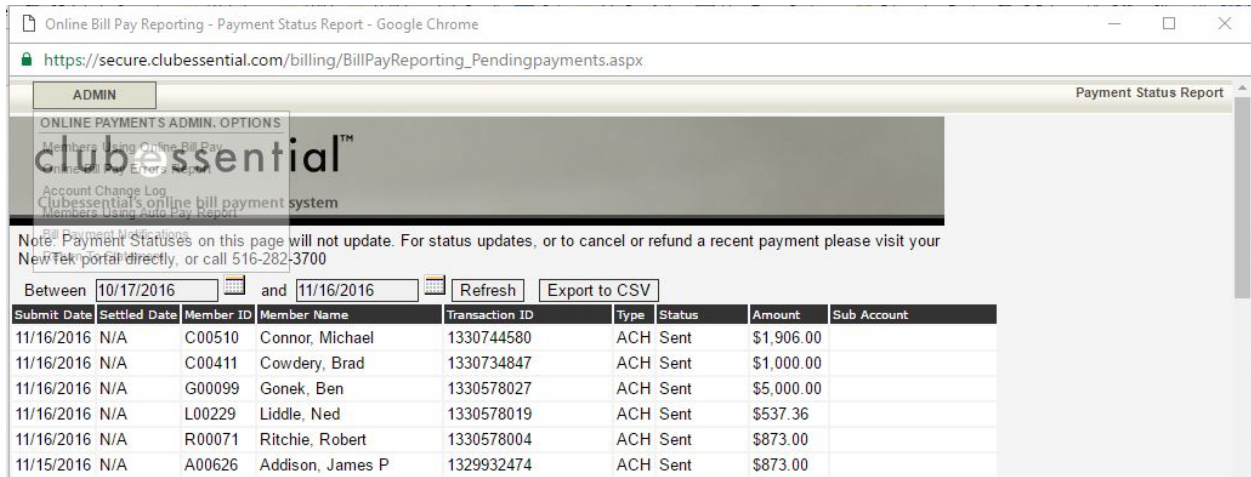
Click Edit Statement Header or Footer to customize the **header** and **footer** of the **statement window**. This is a great place to add **cross marketing** to **statements**. This will launch the **Editor** to customize the **Header/Footer** with text, links, and imagery.
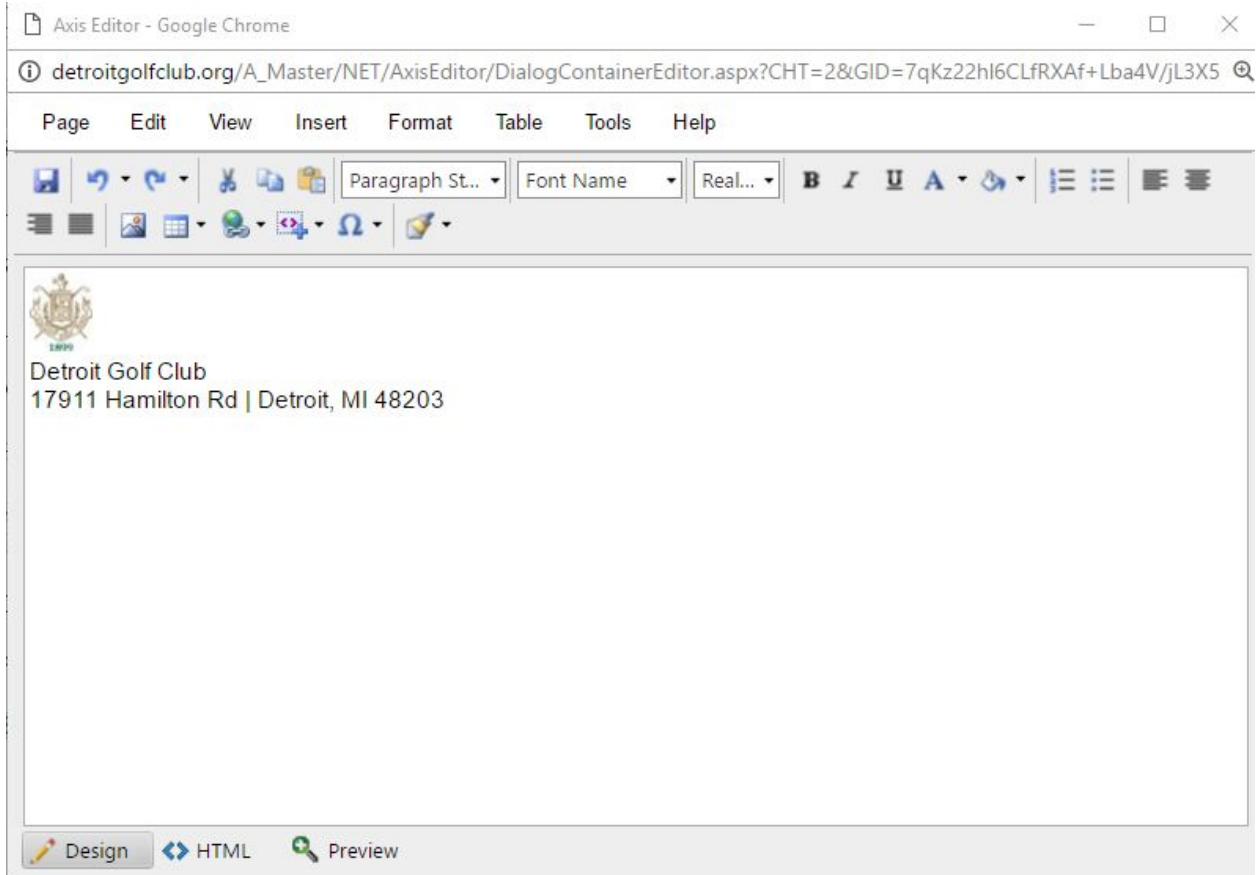
To **Return to Statement**, **hover** over **Admin** and **click Return to Statement**.
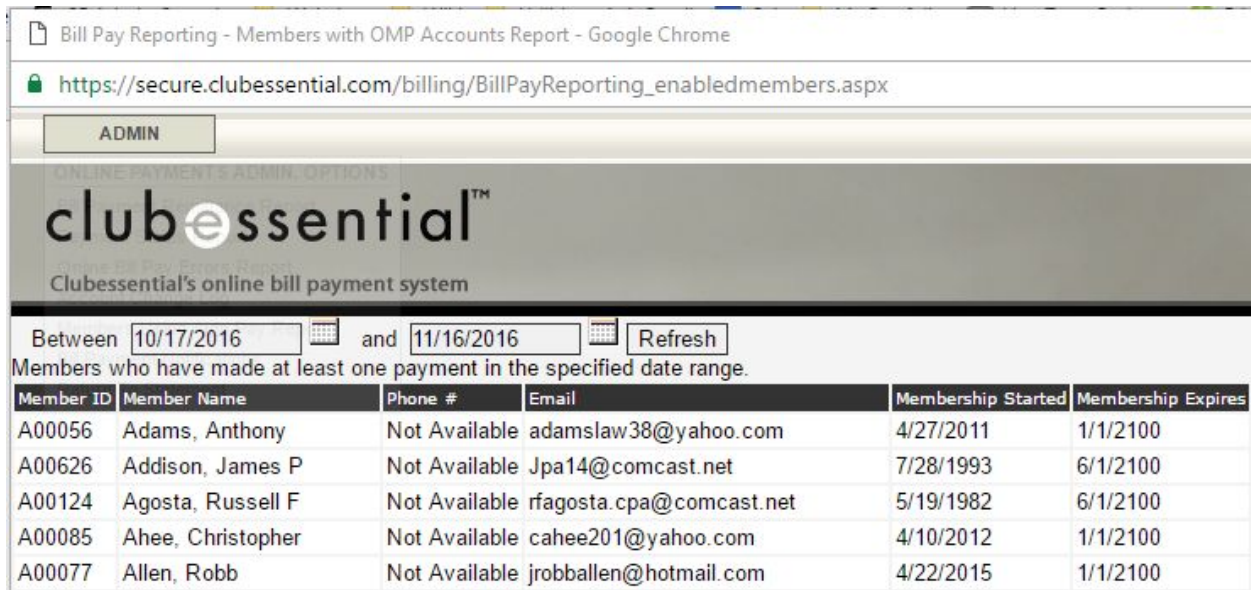
Payment Status Report shows when member **payments** were **sent, settled, posted, or failed**.
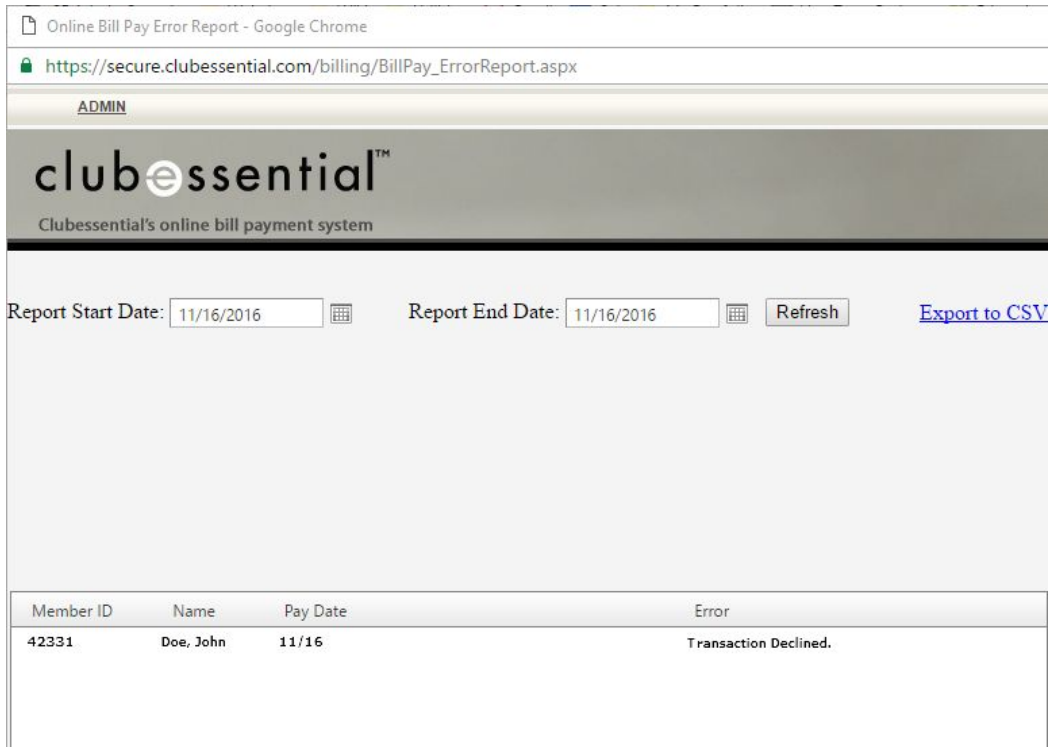

- Change the date by clicking the date picker and then click refresh.

Members Using Online Bill Pay lists members that are using **online bill pay**.
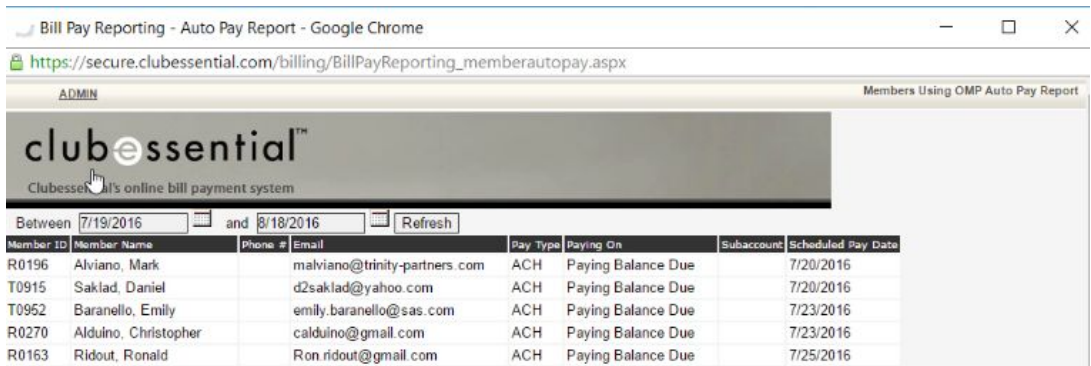
Online Bill Pay Errors Report shows **bill pay errors or failures**.

Members Using Autopay Report lists members using **Autopay**.

Account Change Log shows which members have changed their accounts like card number or payment dates.

Bill Payment Notification allows edits to **payment notifications**.

Click the **title** to **customize notifications** as needed.

This will launch the **Notification Interface** where the **Message Subject, Send From Name, Send From Email, and Text** may be customized.

FAQs

Q: I had a payment that failed. Where can I find why it failed?

A: Open the Statement Interface, hover over **Admin,** and **click Online Bill Pay Errors Report.** Here you will find a list of payments that failed by member with the date it failed and the error type.

Q: I am not sure if my member is set up for **AutoPay**, how can I verify this?

A: Open the Statement Interface, hover over **Admin,** and **click Members Using Autopay Report**. This will list members using the **AutoPay.** If the member is not on the list, they can enable **AutoPay** by accessing their statement window and clicking on **Bill Pay**.

Best Practices

1. Customize the **Header and Footer** of the statement window in order to cross market to your membership. Be sure to update this often so there is new material that is relevant to your members.

2. If a member has an issue with their statement, first check their statement on the website for accurate information and balances. If balances are different in the accounting system compare to the website, contact Clubessential as updates may need to be made to the sync.