

How can I prevent an ex-member from receiving invoices?

Michael C. - 2021-12-24 - Membership Management

If an ex-member is still receiving emailed invoice notices from your club, you can fix this by adjusting their debit/credit with the club.

1. To access the billing functions, you must first log in to your website. Then, click on the **Organization** tab.
2. Next, click on the **Dues & Billing** link.
3. This will bring you to the **Billing Home** screen. On the left side of the screen, under the **Statement** heading, click on either **Credit Adjustment** or **Debit Adjustment** as appropriate. Click **Credit Adjustment** if you wish to erase money owed by the member, and **Debit Adjustment** if you wish to cancel out money owed to the member.
4. In this example, we will select a **Credit Adjustment**, to cancel an outstanding invoice for a former member. When you click Credit Adjust, you are taken to the Credit Adjustment page. Here, you may select the member for whom you wish to issue a credit. To access ex-members, click the check box next to **Show Inactive**.

Add a Credit Adjustment

Select Member	-- Select Member --	☐ Show All Types
Comment	Credit adjustment	
Amount (\$)	0.00	
	<i>Enter a positive number that will act as a payment to decrease the balance owed.</i>	
Transaction Date	Dec 24, 2021	

5. Now, choose the ex-member from the **Select Member** drop down menu.

Add a Credit Adjustment

Select Member	Weaver, Alan	☒ Show All Types
Account Balance	\$1,201.50 Owed to Club View Statement	
Comment	Credit adjustment	
Amount (\$)	0.00 <i>Enter a positive number that will act as a payment to decrease the balance owed.</i>	
Transaction Date	Dec 24, 2021	

6. The **Account Balance** field contains the amount owed by the ex-member.

Add a Credit Adjustment

Select Member	Weaver, Alan	☒ Show All Types
Account Balance	\$1,201.50 Owed to Club View Statement	
Comment	Credit adjustment	
Amount (\$)	0.00 <i>Enter a positive number that will act as a payment to decrease the balance owed.</i>	
Transaction Date	Dec 24, 2021	

7. To cancel out this balance, enter the appropriate sum in the **Amount(\$)** field.

Add a Credit Adjustment

Select Member	Weaver, Alan	☒ Show All Types
Account Balance	\$1,201.50 Owed to Club View Statement	
Comment	Credit adjustment	
Amount (\$)	1,201.50 <i>Enter a positive number that will act as a payment to decrease the balance owed.</i>	
Transaction Date	Dec 24, 2021	

[Cancel](#) [Post](#)

8. Click **Post** when you are done, or **Cancel** if you wish to abandon your changes.

Add a Credit Adjustment

Select Member Weaver, Alan ☒ Show All Types

Account Balance \$1,201.50 Owed to Club [View Statement](#)

Comment

Amount (\$)
Enter a positive number that will act as a payment to decrease the balance owed.

Transaction Date Dec 24, 2021

[Cancel](#) [Post](#)

9. You will then be taken to the **Billing Transactions** page for the ex-member, where the member's **Account Balance** should now be \$0.00.

Billing Transactions

Alan Weaver
You have a credit of \$0.00 USD

[Send Statement by Email](#)

[All Transactions](#) | [Print Report](#)

Date	Trans Type	Description	Due Date	Charge	Payment
Dec 24, 2021	Credit Note	Credit adjustment			\$1,201.50
Oct 13, 2021	Invoice	Billing Invoice: Club Invoice-Quarterly bill for Oct 13, 2021 (Invoice No:885)	Nov 13, 2021	\$100.00	
Jul 1, 2021	Balance Forward	Previous Balance		\$1,101.50	
Total:				\$1,201.50	\$1,201.50
				Account Balance	\$0.00

10. If you wish to further ensure that an ex-member does not receive invoices or emails from the club, you can access their member profile and remove their primary email account. If you wish to retain their email for records without sending them messages, you can enter it in their **Alternate Email** field.

Member Details

Title

Gender Male

First Name

Date of Birth Jan 14 1965

Middle Name

Anniversary

Last Name

Spouse/Partner First Name

Nickname

Spouse/Partner Last Name

Suffix

Spouse/Partner Nick Name

Preferred Address ☒ Home ☐ Work

Spouse/Partner Date of Birth

Preferred Phone ☐ Business ☒ Home ☐ Cell

Dues & Billing Preferred Email ☒ Primary Email ☐ Alternate Email

Email

Alternate Email

*All emails will only be sent to the primary email address

Birthday and anniversary years can only be viewed by Club Executive level or higher.

Related Content

- [How do I print/email invoices?](#)
- [How do I send statements to members?](#)
- [How do I print member invoices?](#)
- [How do I create a new bill?](#)
- [What is the member profile, and how do I edit it?](#)