

FAQ | Membership Administration

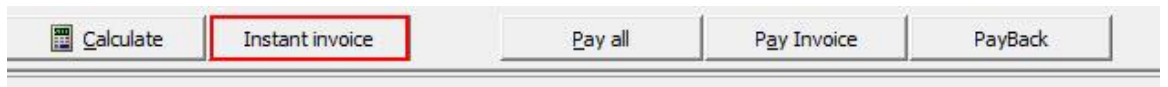
Generate an Instant Invoice

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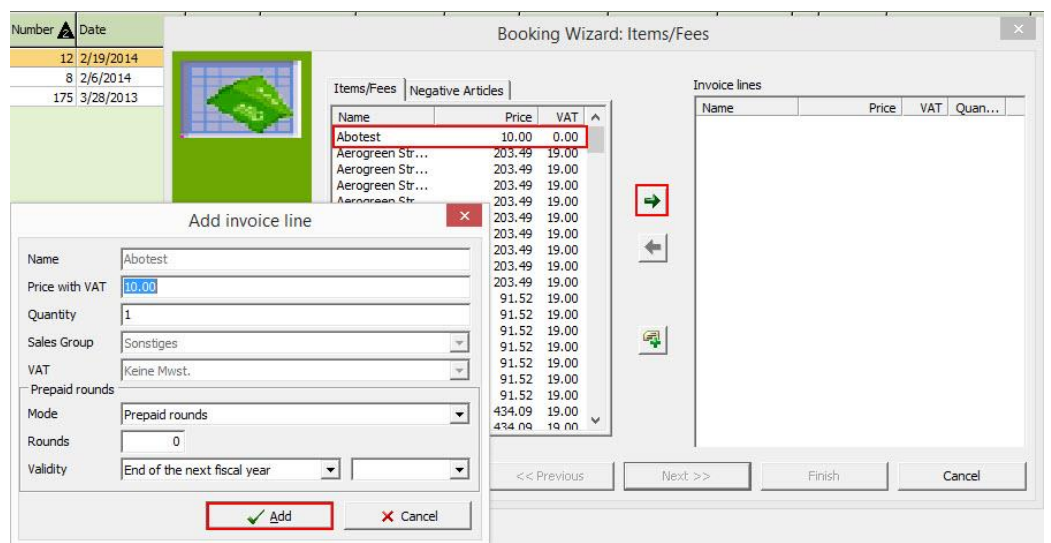
- From the main screen, select the relevant member. Click on the tab "Booking".

Customer Account...	C-Type	Sub type	Number	Title	Last Name	First name	Agegroup	Bhpc	Gender	Birthdate	Homeclub Name	Distance to club	Age	CustomerSal...
10047	Gast	Gast	10047		Däumer	Frank	SenH	13,0	male	6/11/1948	Rhein Man, GC		67	0,00
11539	Gast	Gast	11539		Degmann	Hilde	SenD	39,8	female	10/6/1943	Schwanhof, GC		71	46,60
11260	Gast	Gast	11260		Denzinger	Klaus		9,8	male		Heimatsclub unbekannt			0,00
11255	Gast	Gast	11255		Derscheid	Christian		18,1	male		Heimatsclub unbekannt			0,00
104	Mitglied	ord	104		Desgranges	Christian	JuSH	24,0	male	4/8/1967	Test-GC Albatros		48	0,00
11498	Gast	Gast	11498		Diemer	Dagmar	JuSD	12,4	female	10/9/1971	Bad Abbach-Deutenhof, GC		43	0,00

- At the bottom, on the left-hand side, click on "Instant invoice".



- The "Booking Wizard" will then appear and list different items and fees. Select the item / fee you want to charge and use the arrow to move the item / fee to the right side. A new window for adding the invoice line will appear. Check if the name, price, and quantity are correct and click "Add". Repeat the procedure until all requested items / fees are on the right side. In case that you want to delete an item / fee, simply drag it back to the left side. Then click "Next".



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4. Select the "Family Mode" and "Sort order" and click "Next".



Booking Wizard: Family Mode

Family Mode

Family

Individual

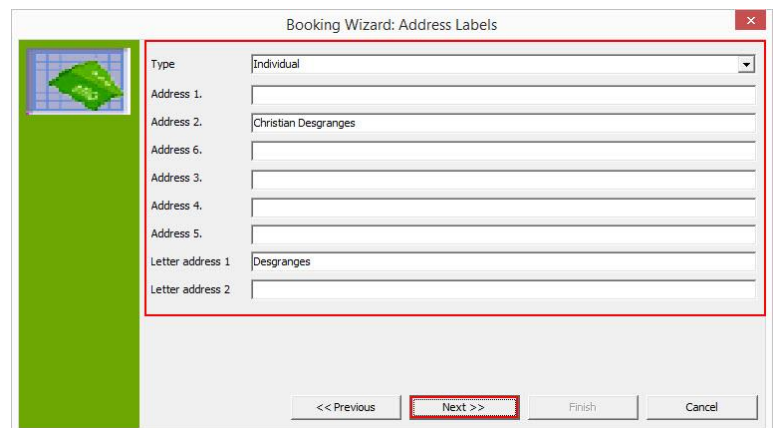
Sort order

By surname, frame

By custno

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5. Then, check whether the address label is correct and, again, click "Next".



Booking Wizard: Address Labels

Type Individual

Address 1.

Address 2. Christian Desgranges

Address 6.

Address 3.

Address 4.

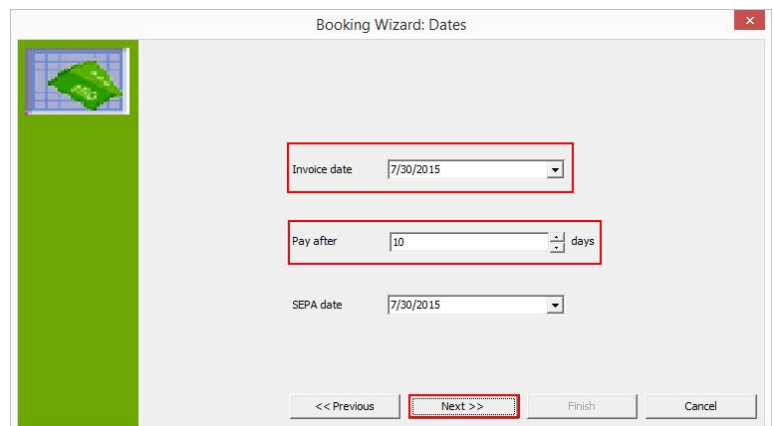
Address 5.

Letter address 1 Desgranges

Letter address 2

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6. Select the invoice date and reminder level ("Pay after") and click "Next".



Booking Wizard: Dates

Invoice date 7/30/2015

Pay after 10 days

SEPA date 7/30/2015

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7. Define the invoice number and click “Next”.

Booking Wizard: Invoice Numbers

Prefix: 06-

Length: 6

Increment: 1

Start with: 74

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8. Then click “Start” to generate the invoice. As soon as the invoice is generated, you can see how many invoices and how many positions have been generated. Click “Next”.

Booking Wizard: Generate Invoices

Generating invoices for 1 customers...
1 invoices with 1 invoice lines were generated

Saving invoice details...
Saving undo data...

Start

Generated 1 invoices with 1 articles

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9. The following table lists all invoices and invoice details. Click “Next”.

Booking Wizard: Invoices

Number	Date	DocName	CustomerNo	CustomerN...	CustomerF...	Total with...	VAT	Send invoi...
1772_7/30/...		06-000074	104	Desgranges	Christian	10.00	0.00	<input checked="" type="checkbox"/>

Order by SurName, FirstName

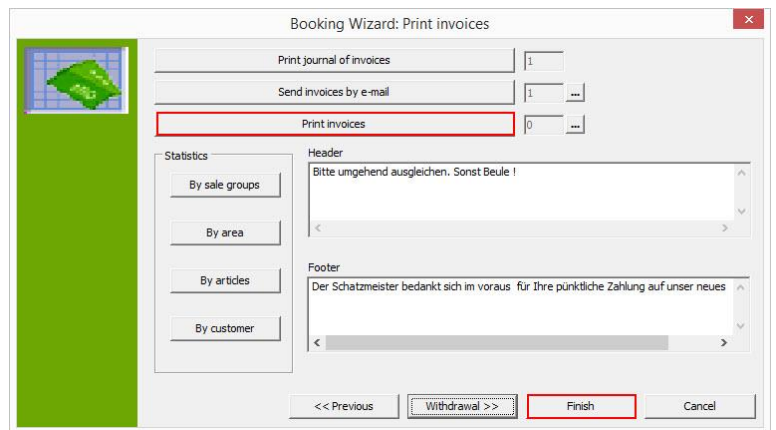
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10. Before printing the invoice, you have the possibility to enter a text for header and footer. Moreover, you can print an invoice journal or view statistics. Via "Send invoice by e-mail", customers receive the invoice per e-mail (in case that an e-mail address has been entered), via "Print invoice", you generate a print version of the invoice. If you click on "Withdrawal", you create a debit memo. Click "Finish" to close the window. Attention – if you click "Cancel", you will be asked whether you want the generated invoices to be transferred to the customer account or not.



11. You will now see the new invoice at the top of the page, marked as an open invoice. In the case of a withdrawal, an offsetting entry will be created so that the balance is settled.
 ➔ See also FAQ 15.

