

FAQ Member Billing

FSPC related

How do I import membership data from either of my existing databases, FSPC or EXCEL?

As of right now, there is no way to import data, such as phone numbers and email addresses, into the Member Billing application. All data must be brought in manually.

How much longer will you support FSPC?

This has not been determined. Discontinuing support is not in the foreseeable future. Keep in mind that even if support is not offered for FSPC, you will be able to continue using the application without our support.

Membership cards

The information doesn't print in the correct place.

Printing from online applications was identified early by our developers as one of the biggest issues we would need to overcome. In the end, we realized that we would never be able to overcome every issue. Our recommendation is to set the "Page Scaling" option in the Adobe Print dialogue box to the "Shrink large pages" setting. Print a test page, and then adjust the "Page Scaling" until you find a setting that works for you. There are a number of users who set the page scaling to "Shrink to Printable Area," and are forced to trim a ¼ inch off the top of the card stock in order to have the cards print properly. This is because printers handle files differently. We ask that users understand that there may be no way for us to help you overcome every print issue.

How do I print Membership cards for a small set of members (reprints)?

For each member card you wish to reprint, set the Billing Status (on the top of the Member Ledger page) to "Dues are Current" and set the "As of" date to an arbitrary date (such as 12-02-2008). When you go to print membership cards, select the tab that says "All Members whose Dues are Current" (instead of the default "By Member Type"). Set the "Show From" and "To" dates as 12-02-2008 (your arbitrary date), and click on the Print Cards button. Make sure you set the "Billing Status" and "As of" date back to their original state.

Note that there is a future plan to allow the printing of individual membership cards via the Member's ledger.

I printed my membership cards for the new year but the dues paid to date is a year behind. How do I correct this?

The "DUES PAID TO" date on the membership card is the last date of the Billing Period for which dues have been assessed.

If you HAVE assessed dues, the "DUES PAID TO" date is the date in the Billing Period field on the Update Billing Status screen (which may be found under Council Ledger/Assessments or Assembly Ledger/Assessments).

If the wrong year was assessed, please refer to "Backing out an assessment" in the Assessment section of FAQ.

If you have NOT yet assessed dues, the date in "DUES PAID TO" is December 31st of the current year.

The packet of membership cards that I received already has 2009 on them. Are these the right cards to use?

The Membership Card Stock that should be used with the Member Billing application will only have the emblem and the words "Knights of Columbus" on the top. The form numbers are 4817 for the 3rd degree cards, and 4818 for the 4th degree cards.

Will we be able to print individual cards, for new members?

For each member card you wish to reprint, set the Billing Status (on the top of the Member Ledger page) to "Dues are Current" and set the "As of" date to an arbitrary date (such as 12-02-2008). When you go to print membership cards, select the tab that says "All Members whose Dues are Current" (instead of the default "By Member Type"). Set the "Show From" and "To" dates as 12-02-2008 (your arbitrary date), and click on the Print Cards button. Make sure you set the "Billing Status" and "As of" date back to their original state.

If you decide not to adjust the "Dues are Current" field, you can generate all of the cards, and use the Adobe "Print" dialogue box to select and print only the pages (not just one card) that you need.

Note that there is a future plan to allow the printing of individual membership cards via the Member's ledger.

Why are all members shown as 1st degree only?

Degree dates should be entered in the Member Management application. Find the member's record to update, and use the "Fraternal Information" screen to update the degree dates.

Do the membership cards already have the degree on them?

No – The member's degree information will print based on the degree dates recorded in Member Management. This information is found on the member's "Fraternal Information" screen in Member Management.

What will the "Paid through" date be on my cards?

Once you assess dues for the period, the "Paid through" date will be the end of that billing period. If the paid through on your cards is a year behind, it means that you have not assessed dues through the Member Billing application.

Notices

Will we be able to print individual bills for members (and New Members)?

Once you generate all of the bills, use the Adobe "Print" dialogue box to select and print only the pages that you need.

Note that there is a future plan to allow the printing of individual notices via the Member's ledger.

Can you sort data using Zip Code?

Not at this time.

I made my Assessment, but none of the bills will show up.

Make sure you have processed your pending assessment. Refer to the "Pending Assessments" page in the "Council Ledger/Assessments" or "Assembly Ledger/Assessments" section. The Member Billing landing page ("Council Ledger" or "Assembly Ledger") also has any pending transactions indicated near the bottom of the page.

Assessments

Councils/Assemblies with multiple Voluntary assessments

There is an enhancement in the works, which will allow the recording of special receipt scenarios (i.e. a member does not pay one voluntary assessment, and contributes more to a second voluntary assessment) through the Enter Receipts screen (not the Dues Collection Tool). Keep in mind that the Dues Collection Tool will always be used to accommodate the standard scenarios where a member does not deviate from the assessed amounts. Over payments in the Dues Collection Tool are automatically credited to the members' future dues.

Until the enhancement is complete, we are suggesting that the member's ledger be edited to properly reflect the amount the member is paying, then enter the amount collected through the Dues Collection Tool.

If I assessed the following to a member:

Dues = \$36.00
Seminarians (voluntary) = \$5.00
School Fund (voluntary) = \$3.00

And the member sent in a check for \$50.00, wishing that \$14.00 go to Seminarians and \$0.00 go to the Schools Fund, I would make the following changes on that Member's Ledger screen:

- 1 - VOID – Special assessment for \$3.00
- 2 - Adjustment
 - Adjustment = Charge
 - Adjustment Type = Special Assessment
 - Adjustment Amount = \$9.00
 - Reason for Adjustment = Seminarians (same name as the "Reason for Assessment")

Once the void and adjustment have been saved on the Member's Ledger screen, navigate back to the Dues Collection Tool (refresh screen if necessary) and the proper amount (50.00) should show as amount due.

Enter the 50.00 payment through the Dues Collection Tool - and based on the void and adjustment entered via the Member Ledger - the monies will be applied properly to the correct accounts.

I would like to be able to look at the pending assessments/dues bills before making them permanent (and printing them) to be sure that I have done things correctly. How do I do this?

The application will not give you the opportunity to view each individual member bill prior to approving (Processing) the "Pending Assessments."

To assure that the assessments will process correctly, after you have generated the assessment (Clicking on the "Asses Dues" button in the council/assembly dues process or the "Assess Other" button in the Special/Miscellaneous process), you should review the amounts on the "Pending Assessments" screen (Council Ledger/Assessments/Pending Assessments or Assembly Ledger/Assessments/Pending Assessments).

If the total indicated properly reflects the amount you feel should be billed (and adjusted), then there should be no question, and you would be able to click on the "Process Assessments" button.

If for some reason, a member's bill is wrong, an adjustment can be made on the member's ledger.

Note that nothing is applied to the member's account until you have gone into Pending Assessments and clicked on the "Process Assessments" button. Also, once you have gone into Pending Assessments and clicked on the "Process Assessments" button, you cannot remove or reset the assessment. Sorry if this sounds scary, but, clicking the "Process Assessments" button is the "Point of No Return" in the assessment process; however, you can make adjustments to Member ledgers to correct errors.

Backing out an Assessment - I inadvertently assessed dues for last year, not next year. How do I back it out?

There is no quick way to remove the transactions for the 2008 assessment. Our suggestion is to go to each Member's Ledger and void the 2008 transaction. It may look like this (Make sure you choose the correct assessment if there is more than one listed on the member's ledger).

Date	Transaction Type	Tran #	Account: Sub Account	Amount
12-15-2008	Assessment	?	Receivable: Dues	38.00

Once all of the 2008 transactions are voided, if you have not already done so, go into the Assessments screen and assess dues for 2009.

Any payments previously processed will be credited to the 2009 dues, and pending assessments can then also be processed. The "Billing Status" for these members should then all be automatically set to "Dues are Current" but we would suggest checking them to make sure they are set properly.

If you already posted the special assessment as mandatory, is there a way of changing it to voluntary?

Since assessments cannot be edited, the only way to change an assessment is to delete it while it is still a "Pending Assessment", and then re-enter it. Once an Assessment has been posted/processed, the only way to change it is to void the (in this case, mandatory) assessment on each Member's Ledger – and then re-enter it as voluntary assessment.

Is there a backup in case of error entries?

The Supreme Council backs data up on a daily basis. However, restorations can not be made on a case by case basis. Our backups are for disaster recovery purposes.

Will you provide a test database that we can work with for familiarization?

As of now, there will be no "Testing" environment for familiarization. We hope that the documents and Webinars will be found as useful as possible in bringing individuals up to speed.

Member Adjustments

I have just recently learned of two (2) deaths after posting our 1st Notice Billing Invoices and would like to know how I would adjust those to zero?

On the bottom of the Member's Ledger screen (click on "Member Information" in the left hand navigation and find the member), you can either make an adjustment (allows you to record a description) or you can click the "Void" box next to all of the outstanding assessments.

A member has the wrong amount on their bill. How do I correct this?

Make an adjustment on the member's ledger (Adjustments are made at the bottom of the Member Ledger page). After that, you can re-run your 1st Notices and Print only that member's Notice. In order to make sure a member is charged the proper amount in the future, make sure you have created the proper Sub Classes (if appropriate) and assign the member(s) as appropriate.

How do I enter advance dues payments?

If you are just starting to use Member Billing, and need to record an existing credit for a member, make a "Credit" adjustment on the member's ledger (Adjustments are made at the bottom of the Member Ledger page). In the future, Members who pay dues in advance will have a credit on their member ledger.

New Members (Transfers In)

When will my new members show up?

Any member document processed by the Membership Records Department during a given work week will be added to the Member Management/Billing data base on the following Tuesday morning.

How do I assess new members or transfers, when they show up in my system after I've assessed?

To assess new members, you will make an adjustment on their member ledger. One adjustment will be the type "Dues Assessment," and for new members, a second adjustment will be for "Initiation Fee."

Transfers Out of your council/assembly

How do I know if a transferred member has an outstanding balance?

We are currently working on an enhancement that will allow you to review balances of transferred members, and close out any past due balances.

Will the new council/assembly be able to see the payment records and notes I've made in the past or is all of that information cleared out for the new council/assembly?

When a member transfers, there is no member billing information sent to the new council/assembly. Furthermore, none of the "Contact Notes" are sent to the new council/assembly.

Printing

Can I print addresses to an envelope (rather than to a label)?

We do not have an automated function to do this. You would need to use the Data Extract Tool, in the Member Management Print Center, to create a spread sheet, and then create a merge document to generate your envelopes.

General

How do I see all of my members on one screen?

Due to data base constraints, this application will not return a list of all of your members on a screen. You can view all of the member's last names that start with a particular letter by placing that letter followed by an asterisk in the search box.

Is there as Outstanding Balance report?

Unfortunately, we have not yet created the Outstanding Balance report. However, we are working on it. At this time, the only way to get a view of outstanding balances would be to step through your alphabet in the Dues Collection Tool (Council Ledger/Receipts/Dues Collection Tool or Assembly Ledger/Receipts/Dues Collection Tool) to see who still has a balance.

Who has access to Member Billing?

Financial Secretaries have access to the Council information and Faithful Comptrollers have access to the Assembly information. There is currently no way to change these assignments.

Have you tested the system with Safari? Firefox? Windows and Mac?

Supreme Council has done testing on all platforms and browsers. Internet Explorer, Firefox and Safari are the main browsers supported for our applications. There have been issues reported in Firefox and Safari, so if possible, we recommend using Internet Explorer for the time being. As we continue our development, we will be addressing issues as they are found / reported. If you think you have found an issue, it can be reported via the contact us link.

Why do deceased members, as well as suspended and withdrawn members, show up in Member Billing?

Deceased Members and Suspended members remain in Member Billing so that any outstanding balances can be written off. There are two issues that need to be worked out in the application. First, the member's Type (Deceased, Inactive, Prior) needs to be better identified. Second, a decision needs to be made to allow members to be set as "non-viewable" in Member Management.

How do I populate the account balances with existing balances from my other system?

Unfortunately, we did not accommodate this situation. Most Financial Secretaries are starting from scratch. However, if you want the past balances in the accounts, you could record a Voucher or Receipt, and make a notation in the description that the entry is to initialize your balances.