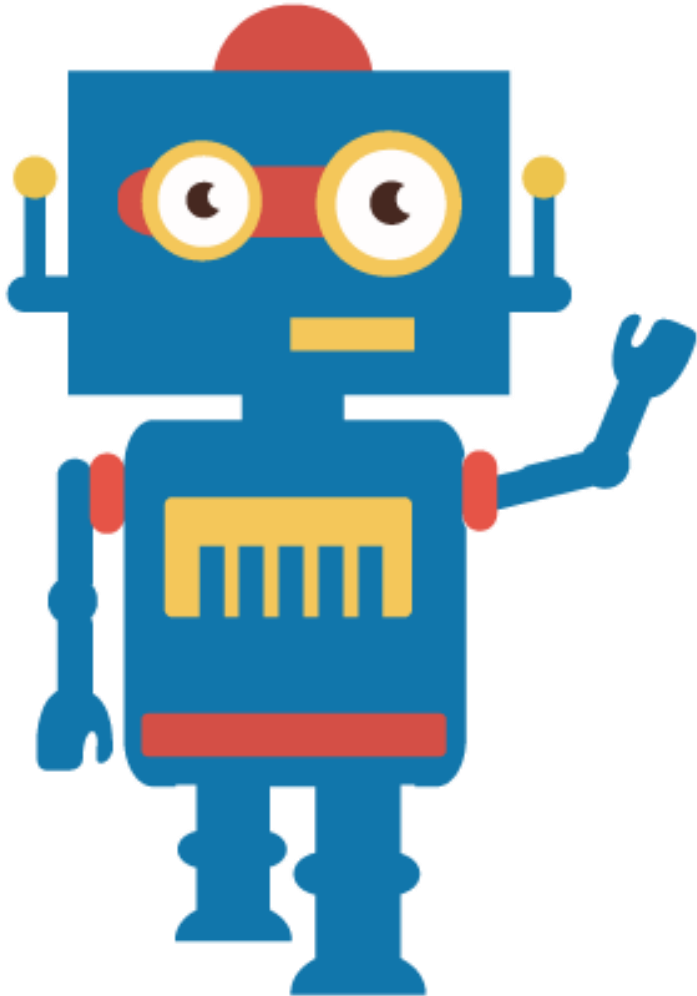




Collect Your Dues!

#WLSummit

Meet the Presenters



✦ **Lauren Bashaw**, *QA Analyst*

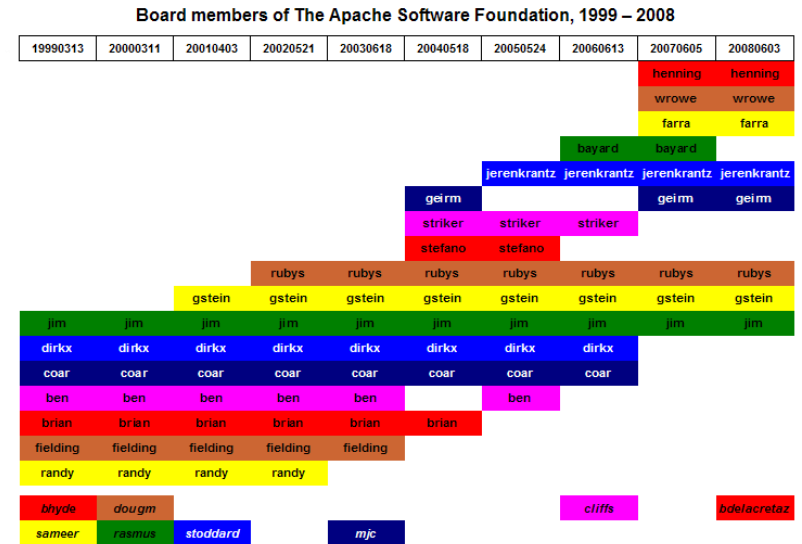
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✦ **Beth Dice**, *Onboarding Specialist*

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Renewal Plans: Track It!

Putting a dues renewal collection plan in place is vital for staying organized and actually getting your dues paid!



Names in *italic* have served on only one board. Dates are when a new board begins. Colors are from the rainbow.



Generate Your Invoices

Auto-Generate Invoices

- ✱ Strategically use the Invoice Date field
- ✱ Enter Invoice Memos (if applicable)
- ✱ Stay Organized with Batches
 - Dues vs. Non-Dues Billing
 - Separate Accounting Packages
 - Dues Levels/Revenue Items

Print Invoices



Print Hard Copies

✱ Use Quick Links

✱ Export as PDF or print directly

✱ Use the Invoice Selector to search and print small selections

✱ **Reports Menu:**

- Invoices by Batch
- Open Invoices by Aging Period
- Referral Reports

Email Invoices

The background is a solid blue color. On the right side, there is a faint, light blue graphic consisting of a central hub with several lines radiating outwards to various points, some of which are connected to circles. This graphic is partially obscured by the text on the left.

Send Invoices Electronically

- ✱ Use the Invoice Selector to create lists
- ✱ Segment your lists by aging period, amount, etc.
- ✱ Create HTML Templates for each segment
- ✱ Record Contact Records to be used in your Collections Report

Other Helpful Features

- ✱ Members without Dues Billing Records report
- ✱ Create messaging on Member Login
- ✱ Add Voluntary Contributions to Online Bill Pay
- ✱ Mass Write-Off – *don't let aging get out of control!*

Member Login Notification

- ✱ Search for a set of invoices in the Invoice Selector
- ✱ Right-click to create your notification message
- ✱ Right-click for three options to display it:
 - Show Notification Message if Unpaid
 - Show a Payment Link
 - Disable Members Only Access if Unpaid

Voluntary Contributions

- ✱ Create Optional Revenue Items in your Admin menu
- ✱ Use a flat amount or percentage of dues
- ✱ Allow members to either opt in or opt out
- ✱ Voluntary items are created automatically

Write Off Unpaid Invoices

Don't let unpaid invoices sit there for eternity!

- ✱ Determine a maximum number of days aging (don't exceed 120)
- ✱ Drop members promptly
- ✱ Use the Write Off invoices tool to adjust all dropped members in one easy step

Online Resources

WebLink University

www.weblinkuniversity.com/revenue/revenue.aspx

WebLink Support Knowledge Base

www.weblinksupport.com