Collection

Introduction

Quick Answer

- To assign a member to a Payment, and email a payment request, login to your **Club Control Panel**.
- Click the **Payments** tab.
- Select the relevant **Payment Product**.
- To assign members, click the **Assigned Members** tab.
- Select the relevant members and click **Assign Members**.
- To send payment request emails, click the **Members Not Paying** tab.
- Select the relevant members and click **Send Payment Request by Email**.

In this guide, you will learn how to prompt a member to pay online.

There are two steps involved:

1. Assign the member to the correct payment.
2. Email the member requesting they pay online.

Assigning Members

Before you can email a payment request to a member, you need to assign the payment to the member.

Crucially, assigning members allows you to send payment prompts and track who has not paid.

To assign a Payment Product, login to your Club Control Panel and click the 'Payments' tab.

Your payment products will be listed on the first page. For information on how to create a new Payment Product, please **click here**.

Select the Payment Product you wish to assign members to by clicking the title of that product in the list.

Click the blue 'Assigned Members' tab.

Use the search box or filters to locate members, then select each member by ticking the boxes to the left of their name.

To select all members, tick the top box to the left of where it says 'First name'. This will select all the members displayed on the current page (max 50). If there are more than 50 members, click the prompt that appears at the top of the list to select those members that are not displayed on the current page.

Click the grey 'Assign Members' button at the top of the list to assign the selected members to the product.

The members you have assigned will then be shown in the right-hand column. If you need to unassign a member, click the grey 'Unassign' button to the right of their name in this column.

You are now ready to email your members.

Emailing Members

Emailing a payment request to your members is the most effective way to collect your online payments.

To begin, login to your Club Control Panel and click the 'Payments' tab.

Your Payment Products will be listed on this page. For information on how to create a new Payment Product, please **click here**.

Select the relevant Payment Product by clicking the title of that product in the list.

On your Payment Product page, click the blue 'Members Not Paid' tab.

Members who are assigned to the payment, but have NOT yet paid are listed here.

If no members are shown, either everybody has paid or you still need to assign members. To learn who to assign members, see above.

Select the members you wish to email using the tick boxes.

To select all, tick the top box to the left of the column headers. This will select all the members displayed on the current page (max 50). If there are more than 50 members, click the prompt that appears at the top of the page to select those members that are not displayed on the current page.

Once you have selected all the relevant members, click the grey 'Send payment request by email' button.

On the overlay that appears you will be asked to review the list of members. Note - You will not be able to email any users that are not registered or do not have an authorised email address.

Click the green 'Next' button.

You will then be able to add a message to the payment request email. A short sentence is included here by default, but you are free to change this.

Click the green 'Next' button to preview the email you are about to send.

If you are happy with the email, click the green 'Send Emails' button to complete the process.