

Billings Module

October, 2023

This module has information about client transactions including recurring memberships or one-time payments. Transaction **type** is shown in the description column, if the transaction is for a recurring membership, the **dates covered** will be shown in the pay period column. Transaction **status** (succeeded or failed) and notes can also be viewed in their respective columns.

# How To

## [View transactions details](#pob676xpxu45)

## [View/print/email receipt](#kix.rvhqph1hxxta)

## [Add transaction](#kix.zbcrdvan4xno)

## [View Failed transactions](#kix.2dbsq2ebgl1r)

**Quick View function (+)**

The purpose of this view is to provide a convenient overview of recurring memberships and non-recurring offerings for each client transaction.

* Click on the + sign on the left-hand side of transactions to get a quick view of transaction type and amount

**V****iew/email receipt:**

Receipts include information such as receipt ID, date/time of the transaction, type of transaction (recurring membership/non-recurring offering/custom offering charges), and the full amount of the transaction.

Goto ⋮ on the far right of the transaction:

* Option to view receipt
  + Receipt will open in a new tab and can be printed by using the  icon on the top right corner
* Option to email receipt
  + A copy of the receipt will be emailed to the email address on file

**Buy Membership:** Use the “Buy membership” button on the top bar

List of all membership options available to you will be shown

You can then choose which membership you would like to add from the options listed along with the start date of when you would like for it to begin.

**Failed transactions**

Failed transactions are transactions that did not go through due to issues in the form of the payment method selected for that transaction.