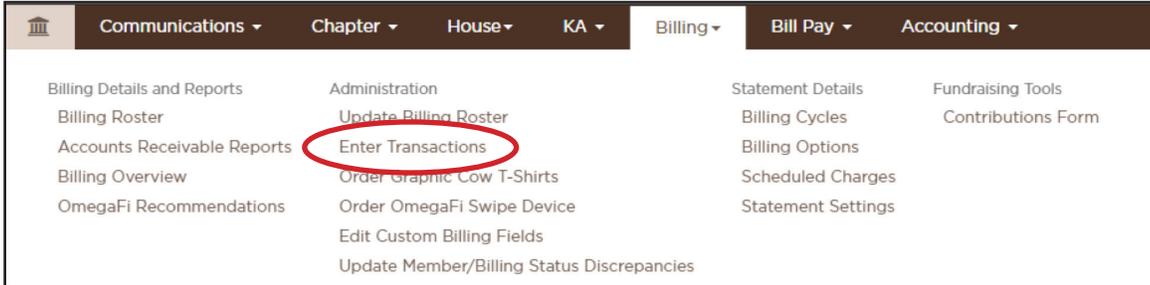


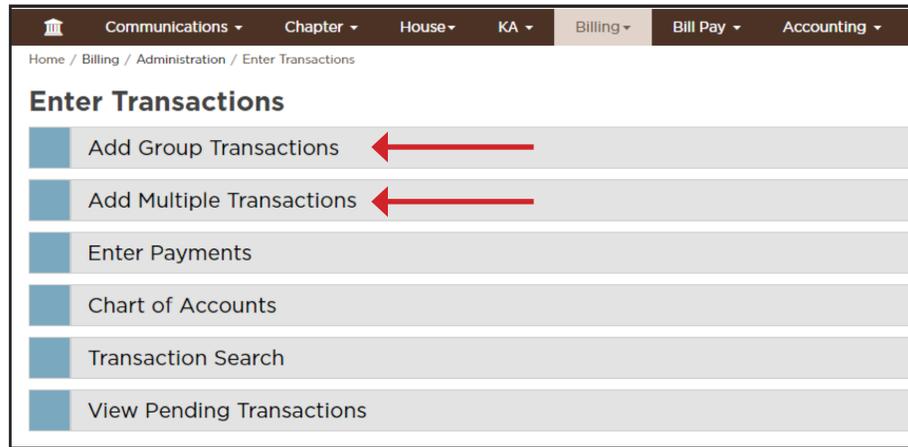
HOW IT WORKS

Add transactions via Vault> Billing> Enter Transactions

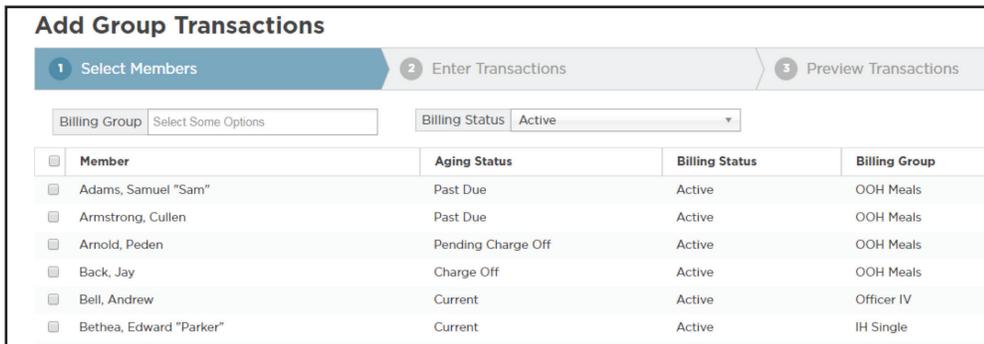
1. Select 'Enter Transactions' to add transactions to a member's account.



2. There are two options to add transactions to member accounts: **Add Group Transactions** and **Add Multiple Transactions**.



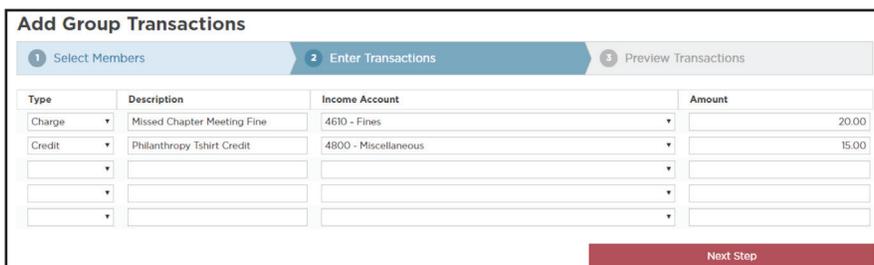
3. **Add Group Transactions**



Member	Aging Status	Billing Status	Billing Group
<input type="checkbox"/> Adams, Samuel "Sam"	Past Due	Active	OOH Meals
<input type="checkbox"/> Armstrong, Cullen	Past Due	Active	OOH Meals
<input type="checkbox"/> Arnold, Peden	Pending Charge Off	Active	OOH Meals
<input type="checkbox"/> Back, Jay	Charge Off	Active	OOH Meals
<input type="checkbox"/> Bell, Andrew	Current	Active	Officer IV
<input type="checkbox"/> Bethea, Edward "Parker"	Current	Active	IH Single

To add the same charge or credit to a group of members, select **Add Group Transactions**. From here you can select the group of members at random or select members of a specific billing group and billing status.

4. Once members are selected, enter the type of transaction to include a description, income account and amount.



Type	Description	Income Account	Amount
Charge	Missed Chapter Meeting Fine	4610 - Fines	20.00
Credit	Philanthropy Tshirt Credit	4800 - Miscellaneous	15.00

[Next Step](#)

5. The next step is to preview the transactions for accuracy. Once reviewed, select **Create Transactions**.

Add Group Transactions

1 Select Members 2 Enter Transactions 3 Preview Transactions

Name	Type	Description	Income Account	Amount
Burton, William	Charge	Missed Chapter Meeting Fine	4610 - Fines	20.00
Burton, William	Credit	Philanthropy Tshirt Credit	4800 - Miscellaneous	15.00
Dean, Tanner	Charge	Missed Chapter Meeting Fine	4610 - Fines	20.00
Dean, Tanner	Credit	Philanthropy Tshirt Credit	4800 - Miscellaneous	15.00
Evans, Steuart	Charge	Missed Chapter Meeting Fine	4610 - Fines	20.00
Evans, Steuart	Credit	Philanthropy Tshirt Credit	4800 - Miscellaneous	15.00

Samples, Jackson	Charge	Missed Chapter Meeting Fine	4610 - Fines	20.00
Samples, Jackson	Credit	Philanthropy Tshirt Credit	4800 - Miscellaneous	15.00
Smith, Ralston	Charge	Missed Chapter Meeting Fine	4610 - Fines	20.00
Smith, Ralston	Credit	Philanthropy Tshirt Credit	4800 - Miscellaneous	15.00

Create Transactions

6. To add multiple different transactions to member accounts, select **Add Multiple Transactions**.

Communications Chapter House KA Billing Bill Pay Accounting

Home / Billing / Administration / Enter Transactions

Enter Transactions

- Add Group Transactions
- Add Multiple Transactions**
- Enter Payments
- Chart of Accounts
- Transaction Search
- View Pending Transactions

7. Select each member from the name drop down, enter the type of transactions to include a descriptions, income accounts and amounts. Select **Create Transactions**.

Add Multiple Transactions

Apply Defaults Type Description Income Account Amount

Name	Type	Description	Income Account	Amount
Bethea, Edward "Parker"	Charge	Philanthropy Tshirt	4800 - Miscellaneous	15.00
Bell, Andrew	Charge	Missed Event Fine	4610 - Fines	20.00
Brown, Frank "McKee"	Credit	Philanthropy Tshirt Credit	4800 - Miscellaneous	15.00

Bell, Andrew	Charge	Philanthropy Tshirt (2)	4800 - Miscellaneous	30.00
Bethune, Greyson "Grey"	Charge	Philanthropy Tshirt	4800 - Miscellaneous	15.00
Bowles, William "Reese"	Charge	Missed Event Fine	4610 - Fines	20.00

Create Transactions