Membership and Tournament System
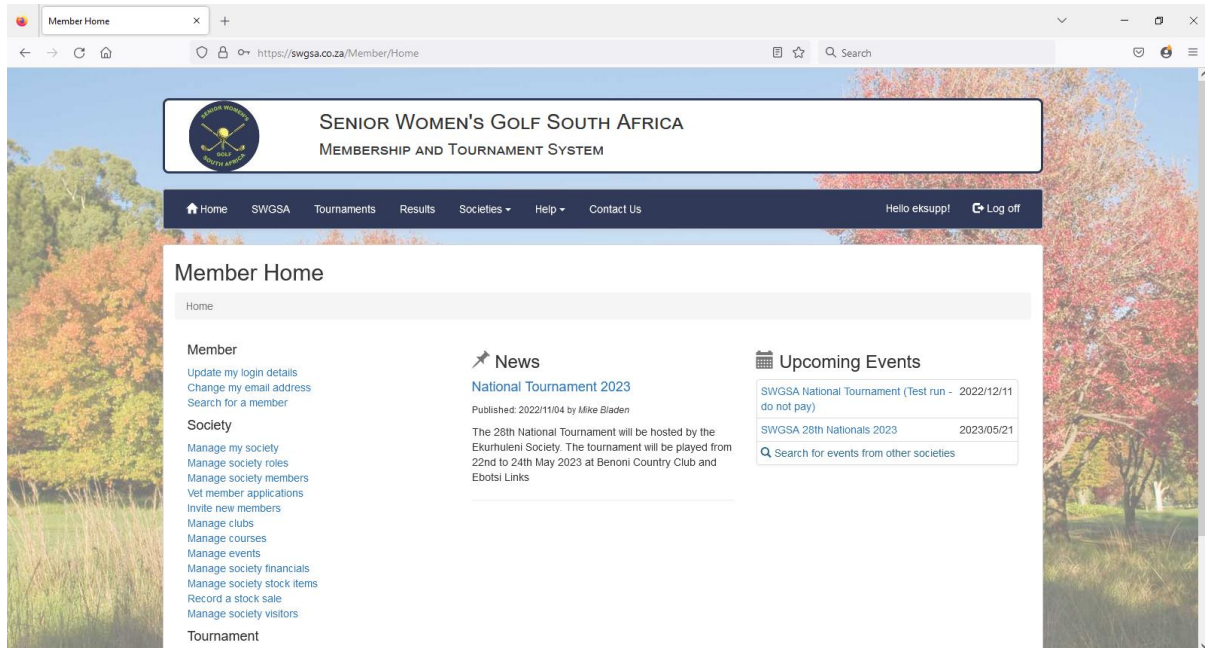
Society Treasurer Handbook

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Introduction

The Society Treasurer is responsible for recording all payments received from, and refunds made to members and for setting up Annual Subscription fees payable by member categories.
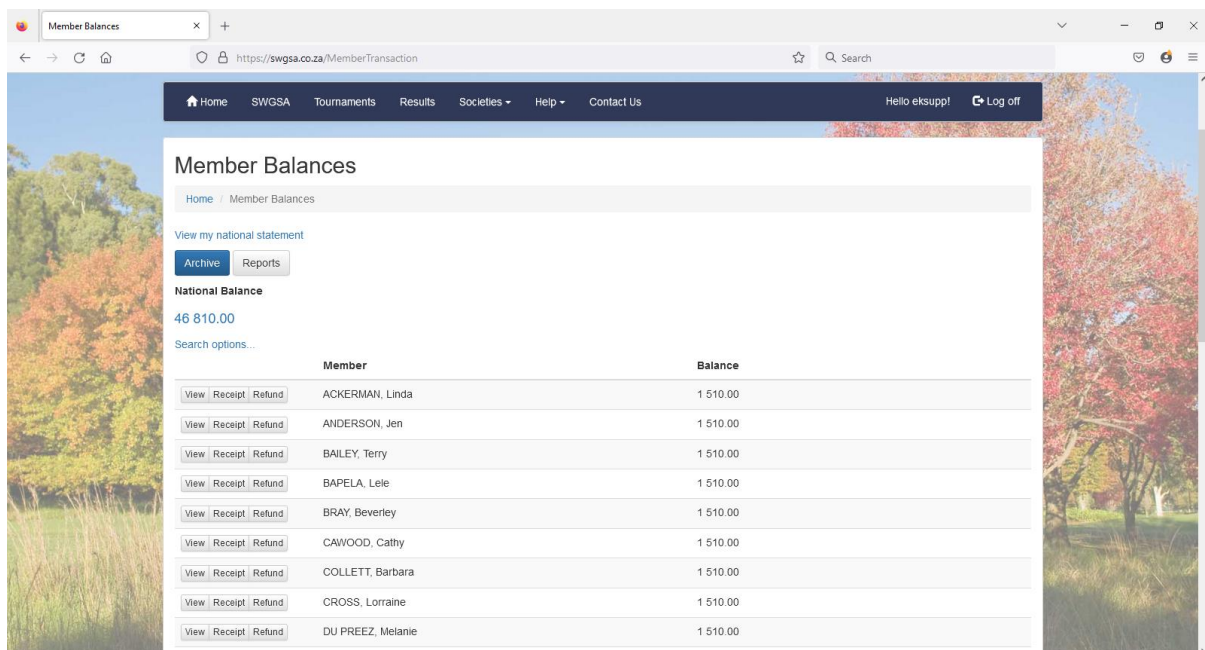
Recording receipts

As Society Treasurer, you have the Manage society financials function available to you.

When you click on this function you get the Member Balances screen.
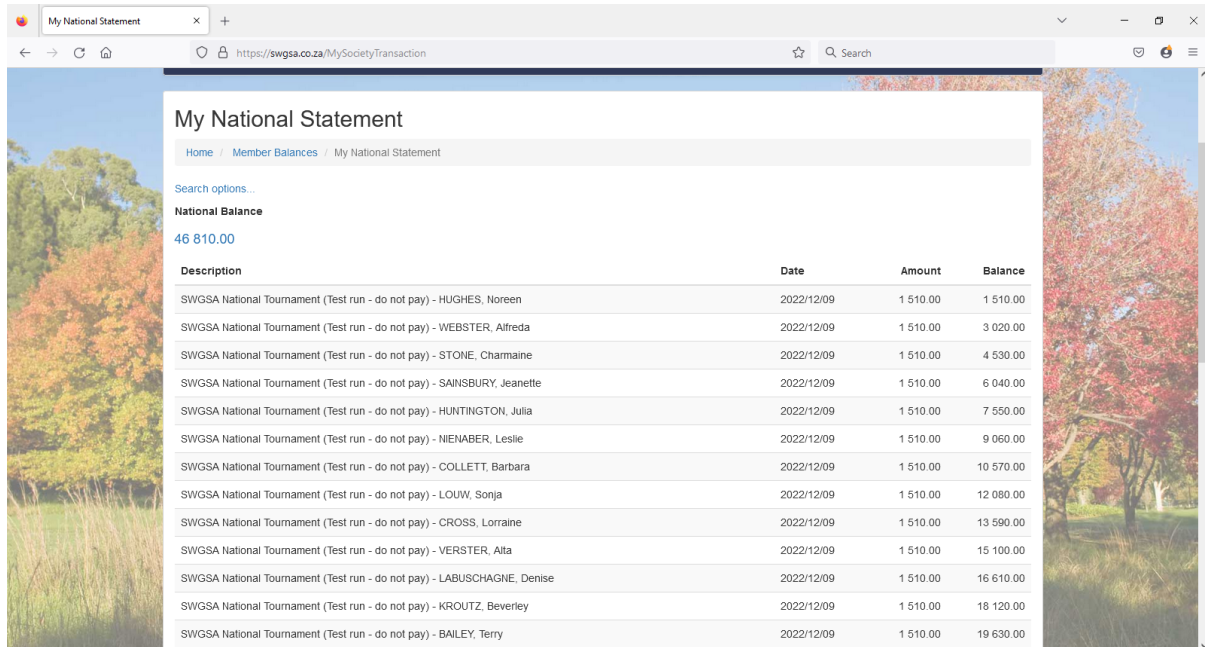
This screen firstly shows how much is owed by your society to the National body. It is your responsibility to make the payment, but it is not your responsibility to record the payment, that is the National treasurer's job.

To see how this balance is calculated, click on View my national statement, which will look like this.

Click Member Balances at the top, or Back to balances at the bottom to return to Member Balances screen.

The default listing only includes members with a non-zero balance. Click the Search options… tab to search for specific members, or to include members with a zero balance.

If a payment has been made by a certain member (on your bank statement), click the Receipt tab next to that member's name.
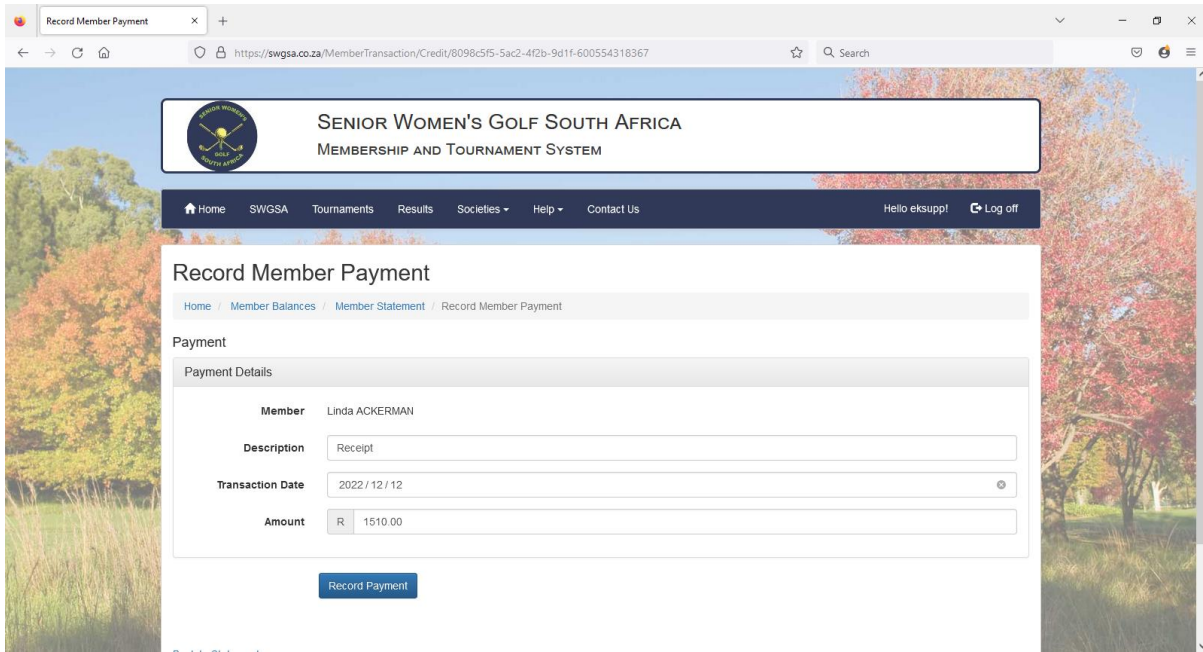
This allows you to record the description, date and amount of the payment made by the member. You may change any of the default fields prefilled by the system.

If a payment is made to a member, click on the Refund tab. Once again, the default prefilled fields can be changed.