

Hints and Tips for Membership Reports, Invoices and Payments, etc. (Chapter Level)

All of the report functions can be accessed through the MAIN MENU **after you Login** to the online membership system.

NOTE: If your information search opens an Excel file or .PDF file, simply close the window when you have finished printing and/or saving the file to return to the online membership system.

How Do I...

Reprint a copy of my Roster Invoice?

Click on *View Invoices and Payments*. All invoices created for your chapter will be listed under the **Invoices** section, showing the Invoice # and Total Dollars.

Click the **view** button after the invoice you wish to see, wait for the .PDF to appear, and then print.

Check to see if DECA Inc. has received payment for dues for a specific invoice?

Click on *View Invoices and Payments*.

Compare the **Invoice** numbers to the **Payment** numbers. Any Invoice #'s that do not appear under Payments are unpaid.

If there are any unpaid invoices, click on **view** to bring up the Invoice and see which members have not yet been paid for. If the invoice was processed recently, check again in a few days. If you think there is an error, contact your check processing department or DECA Inc. to determine status (please have your Chapter ID # and Invoice # available).

Print a report of all of the members that have been SUBMITTED to DECA Inc. so far this year?

Click on *Print Membership Roster*. Then select the *Submitted Roster Report* option.

The .PDF file that appears will contain Chapter Information, Primary Advisor Information, and a list by category of all members that have been **submitted** to DECA Inc. throughout the year.

You can print or save the roster, or just simply view it by scrolling down.

Today's date will appear at the top of the roster report.

How Do I...

Print a report of all of the members whose DUES HAVE BEEN RECEIVED by DECA Inc. so far this year?

Click on ***Print Membership Roster***. Then select the *Paid Roster Report* option.

The .PDF file that appears will contain Chapter Information, Primary Advisor Information, and a list by category of all members whose dues have been received by DECA Inc. throughout the year.

You can print or save the roster, or just simply view it by scrolling down.

Today's date will appear at the top of the roster report.

Export chapter membership data into an EXCEL format?

Click on ***Download Membership Data***. Members that have been submitted to DECA Inc. will appear, divided by membership category.

Select the members you want to download by checking the appropriate boxes OR click on *Select All* at the bottom of the page.

After making your selections, click OK. An EXCEL spreadsheet will pop up.

Save the file to your hard drive (you cannot save it to the online membership system) so that it is available to print as is, or to be changed based on your needs.

Close the EXCEL window to return to the **DOWNLOAD MEMBERSHIP DATA** screen.

TIP: To make another download request, click on the boxes to change the status (to either add or delete a check mark), or click on Clear All to start your selection from scratch. You may need to click on the *refresh* command from your Internet menu.

Send information to my state/provincial advisor or anybody else that needs lists of members (conference registration, name badges, school reports, etc.)?

Follow the instructions in the previous item about downloading data. The EXCEL format will allow you to manipulate the membership data based on your needs.

- Re-order the columns
- Add columns and information
- Delete columns