



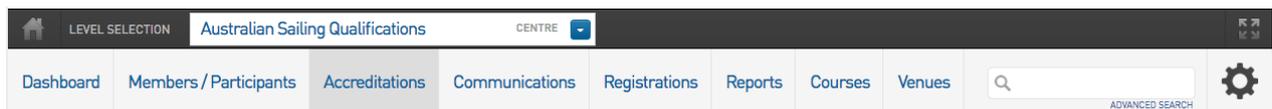
How do I generate Course Renewal Invoices?

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The renewals functionality is designed so that Australian Sailing can invoice their participants with instructor qualifications. Participants are sent an email with the link to pay their invoice which then extends the dates that their qualifications are valid for.

How to generate Renewal Invoices

- 1) Login to Qualification Database
- 2) From the Database Dashboard click on Accreditations



- 3) In the Expiring Accreditation Search specify the date range you wish to search for qualifications that are up for renewal.

Accreditation Renewal

Expiring Accreditation Search Pending Renewals Search

Search for members that have accreditations requiring renewal.

Specify a date range for the invoice due date

From date 1 Jan 2017

To date 31 Dec 2017

Search

- 4) Click Search
- 5) A list of participants with renewals within the specified range will appear.
- 6) Tick the box next to the participants you wish to invoice

Expiring Accreditations

<input type="checkbox"/>	First Name	Surname	Level	Provider	Start Date	End Date (Renewal Date)	Reaccreditation Date
<input checked="" type="checkbox"/>			Dinghy		16/09/2007	30/03/2017	29/06/2018
<input checked="" type="checkbox"/>			Dinghy		21/09/2009	30/03/2017	29/06/2018
<input checked="" type="checkbox"/>			Dinghy		23/06/2015	29/09/2017	29/06/2020
<input checked="" type="checkbox"/>			Dinghy		26/06/2016	25/06/2017	25/06/2021
<input checked="" type="checkbox"/>			Dinghy		21/09/2016	30/12/9999	20/09/2076
<input checked="" type="checkbox"/>			Dinghy		27/08/2015	29/09/2017	27/08/2020
<input checked="" type="checkbox"/>			Yachting Australia Instructor General Principles		18/08/2015	30/12/9999	30/12/9999

7) Once the members you wish to renew are selected scroll to the bottom of the page.

8) Next set the renewal fee price which will show on the participants invoice

Renewal Price

9) Click on Generate Renewal Invoices to finalize the invoice.

The system will automatically take you to the send reminder screen to email the participants you just invoiced with a prompt to pay. You can leave this screen now if you don't wish to email the invoice at this time or continue with sending the payment email.

10) If you continue with the progress you are taken to a list of members that you have just invoiced. You can then unselect anyone that you don't wish to email.

11) Next you can populate the template with additional customized text with further information about the invoice.

12) Once satisfied Click Send Reminder to email the payment email.