U-MAS User Manual: U3A Office-Bearers

U-MAS Version: 6.07

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Introduction

The U-MAS membership management system is widely used by U3As in Victoria. For U3A course coordinators, membership managers, and other office-bearers, U-MAS provides a wide range of features including managing courses, generating reports, and emailing members and course participants.

This user manual is not exhaustive, but is intended to provide quick and easy instructions for the most common U-MAS tasks.

The manual is divided into sections appropriate for each user level/category.

The companion manuals, *U-MAS User Manual: U-MAS for Members* and *U-MAS User Manual: U3A Office Volunteers & Tutors* may also be of use to you.

U-MAS Access Levels

The features and functions available to you in U-MAS depend on your access level.

This document assumes that Course Coordinators and Membership Managers have Level 1 access, and Treasurers have Level 5 access.

The recommended access levels are as below, however, it is ultimately a decision for each individual U3A:

- Course Coordinator: 1
- Membership Manager: 1 or 2
- Treasurer: 5
- Reception (office volunteers): 3
- Tutors: 4
- Advanced Tutors (can add or remove participants from their own courses): 7

A U3A should ensure that each volunteer or office-bearer is trained appropriately to use the features available for their access level.

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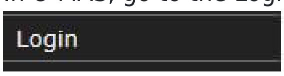
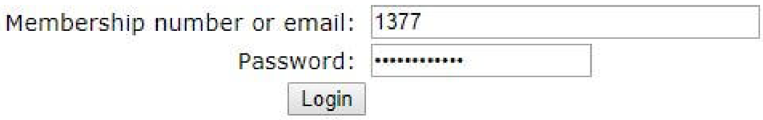
General Tasks

How to log in

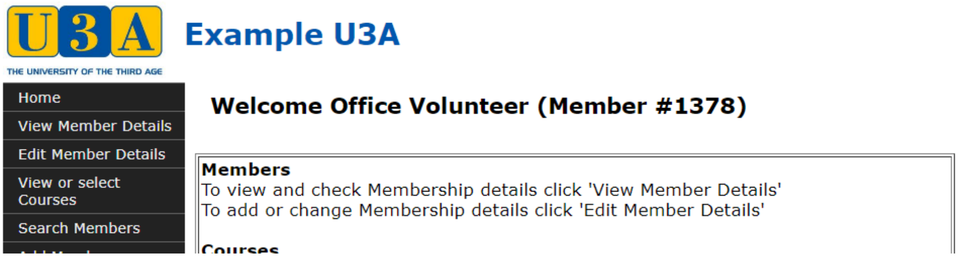
1. In U-MAS, go to the Login link in the left side menu:
   

2. Enter your membership number (or email address) and password, and click the Login button.



Note: Some U3As may provide separate login details for office volunteers: If so, when performing U3A office tasks you should log in using the office volunteer credentials rather than your personal membership credentials.

3. On successful login, you will see a welcome message, and some additional items will be available in the left side menu.



How to log out

1. Click the Logout link in the left side menu:

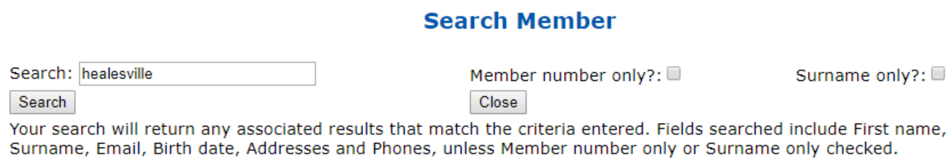
Find a member's details

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin), level 3 (Reception), level 5 (Treasurer)

1. Log in to U-MAS.
2. Click the Search Members link in the left side menu.

3. Enter a keyword and click Search.
   The keyword can be any of: Membership number, First name, Surname, Email, Birth date, Addresses, or Phone number. Tick the Member number only or Surname only box if you only want to search by membership number or by surname.



4. A list of members matching the keyword will be displayed. Click either the View link (last column in the

table) or the member number (first column) to view a member's record.

Member No.	First name	Surname	Address	Suburb	Subs date	
1003	Liz	Member	3 Test St	HEALESVILLE	31/12/2019	View
1004	Louis	Member	4 Test St	HEALESVILLE	31/12/2017	View
1001	Sally	Tutor	2 Test St	HEALESVILLE	31/12/2019	View
1002	Sam	Tutor	1 Test St	HEALESVILLE	31/12/2019	View

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Heads Up!

At this point, any actions done in U-MAS are done *on behalf of* the selected member. For example, if you have "Liz Member" selected and you now edit member details or enrol in courses, you will be doing those things for Liz.

5. You'll now be on the Member Details screen. On this screen you can find the selected member's information, including:
   - Membership number and membership type
   - Personal and contact details
   - Emergency contact
   - Current enrolments and membership invoice status

Member Details

Previous Record | Next Record | Previous Surname | Next Surname

Print

Member number: **1003**
First name: **Liz**
Surname: **Member**
Preferred name: **Lizzy**
Gender: **Female**
Year of Birth: **1955**
Volunteer area:
Member Type: **Single Member**

Street number and name: **3 Test St**
Suburb: **HEALESVILLE**

6. To return to your own login account, use the Login Member Return link in the left side menu:

Login member return

Using U-MAS for Members

Did you know that if you have access level 1, 2, or 3, you can log in to U-MAS for Members on a member's behalf? This provides an alternative way to perform some member assistance tasks, such as updating a member's details, enrolling them in courses, and viewing/downloading their enrolments and invoices.

To log in to U-MAS for Members "as" another member, use the little "Admin" link in the footer of U-MAS for Members. You will need to log in using your member number, your password, and the member's member number.

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For Course Coordinators

U-MAS Access Levels

Different U3As give their office-bearers different levels of access. This guide assumes that a course coordinator has level 1 (Admin Tier 1) access. The features and menu items available to you in U-MAS may vary if you have a different level of access.

Add a new course

Which access levels can do this?

Level 1 (Admin plus set up Courses)

1. First, make sure that the **Category** (Parent Code), **Location** (venue), **Leader**, course **Type**, and **Frequency** to be set for the course already exist. You can check this from the bottom of the **View Courses** screen. E.g. to check the available Categories (Parent Codes), you would click the "List Categories (Parent Codes)" button at the bottom of View Courses. If the required category (parent code) wasn't available in the ensuing list, you could click the "Add a new category (parent code)" link to add it.

2. Also make sure that your U3A's general holiday dates (dates on which courses may not run) are set up: You can check and adjust holiday dates if required, from the "List Holiday Dates" button at the bottom of the **View Courses** screen.

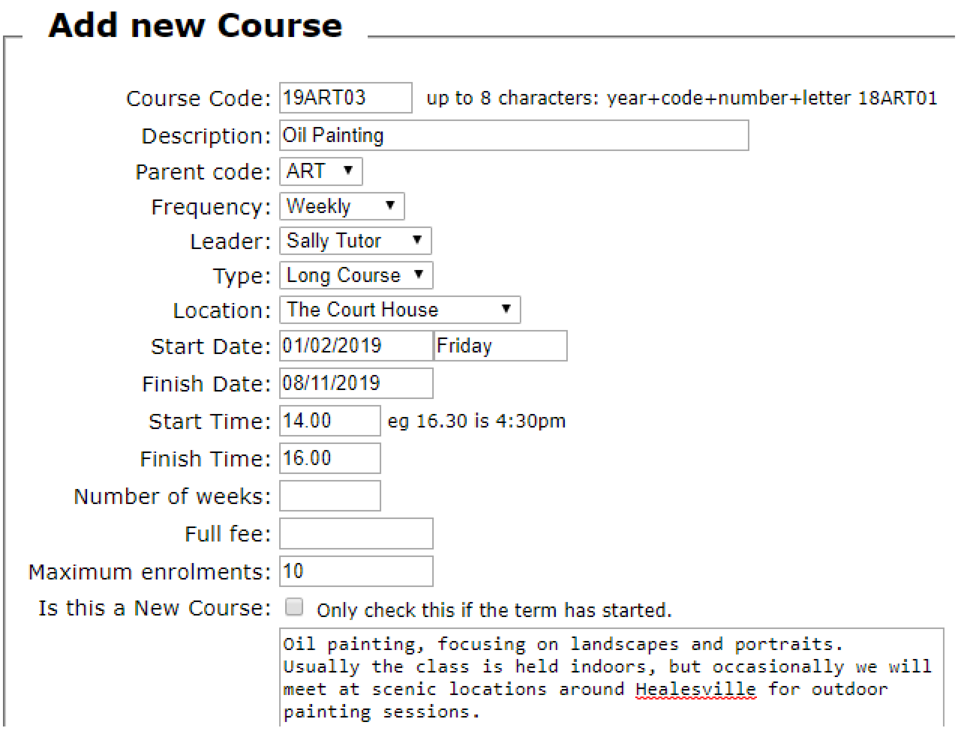
3. Click Add Courses in the left side menu.
   

4. On the Add A New Course screen, fill in the course details:

   - **Course Code**: A unique code (like an ID) for this course. Up to 8 characters.
     Most U3As have a naming system for their course codes, e.g. year+category+number (like 19ART01), or year+day+number (like 19MON01).
   - **Description**: The name / title of the course.
   - **Category (Parent Code)**: The category (parent code) in which this course belongs.
     Most U3As divide categories (parent codes) by interest area, e.g. ART (arts and crafts), EXE (exercise and sports), etc.
   - **Frequency**: The frequency code, representing how often the course runs.
     E.g. your U3A might have a frequency code "2&4", to mean the 2nd and 4th weeks of the month, and a frequency code "Wkly", to mean weekly.
   - **Leader**: The course tutor/leader. (Your U3A may also have an optional field for **Assistant Leader**.)
   - **Type**: Course type.

Your U3A might define course types such as "Short Course", "Year-Long Course", "Correspondence Course", etc.

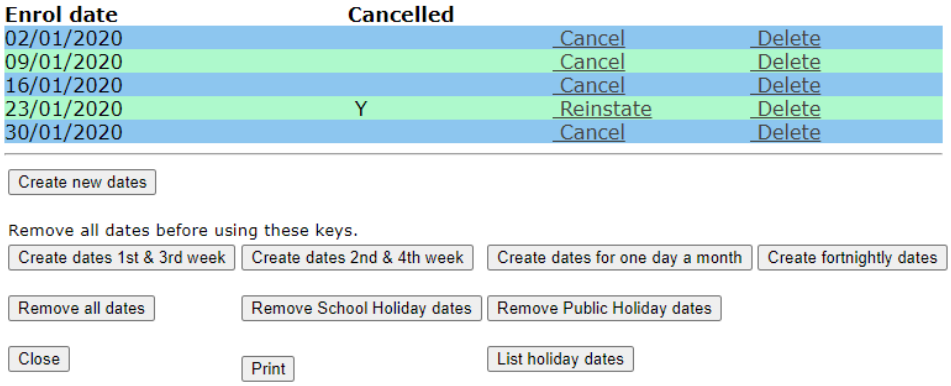
- **Location**: The course venue. (If the required location isn't available, you will need to create a new location: See Add or edit a course location in this user manual.)
- **Start Date** and **Finish Date**: The first and last dates on which the course runs. Clicking in the field opens a date picker.
- **Start Time** and **End Time**: Course start and end time, entered in 24-hour format with a decimal point (.) instead of a colon (:). E.g. for 4:30pm you would enter 16.30 .
- **Full fee**: Usually this can be left blank, but if there is an additional charge for this course, enter it here.
- **Maximum enrolments**: If this course has a maximum number of enrolments, enter it here.
  Note: If enrolments in this course require approval (for example, an advanced language class may only accept participants with a minimum skill level), set maxmimum enrolments to 0, so that all enrolments will go on the waitlist: Participants can then be checked and accepted as appropriate. See Move member from waitlist to course in this user manual for details.
- **New course**: If you want to emphasise the fact that this is a new course, tick this box. (In the course list seen by members, New courses that haven't already started will be highlighted.)
- **Administrator only**: If ticked, this course will not be visible to members, and members will not be able to enrol themselves in it. This can be useful if setting up a course for testing purposes.
- **Covid restricted**: During the COVID-19 pandemic, this setting was used to indicate a course that was taught face-to-face, with participants required to be vaccinated.
- **Distance course**: Indicates that the course is taught online, or using some other distance method. (Some U3As offer special distance-only membership types.)
- **Comments**: Course description.
- **Prerequisite**: Any additional information, such as course prerequisites.
- **Admin notes**: These notes will not be displayed to members.


Add new Course
Course Code: 19ART03 up to 8 characters: year+code+number+letter 18ART01
Description: Oil Painting
Parent code: ART
Frequency: Weekly
Leader: Sally Tutor
Type: Long Course
Location: The Court House
Start Date: 01/02/2019 Friday
Finish Date: 08/11/2019
Start Time: 14.00 eg 16.30 is 4:30pm
Finish Time: 16.00
Number of weeks:
Full fee:
Maximum enrolments: 10
Is this a New Course: Only check this if the term has started.
Oil painting, focusing on landscapes and portraits. Usually the class is held indoors, but occasionally we will meet at scenic locations around Healesville for outdoor painting sessions.

5. Click the Add Course button at the bottom of the screen.

6. Now you'll be on the **Dates List** screen: A list of dates (individual dates on which the course runs) will be automatically created for the course, and you can edit them here if required. There are buttons at the bottom of the screen for bulk editing, or you can edit individual dates:

    - **Create New Dates button**: Create one new date for this course, by specifying the date.
    - **Remove all dates button**: Delete all dates for this course.
    - **Create dates 1st & 3rd week** and **Create dates 2nd & 4th week** buttons: Create dates for the 1st and 3rd weeks of the month, or 2nd and 4th weeks of the month.
    - **Create dates for one day a month** button: Create dates for one day per month, on the same day of the week. For example, if the course start date falls on the first Thursday in January, then dates will be created on the first Thursday in each month between January and the course finish date.
    - **Remove School Holiday dates** and **Remove Public Holiday dates** buttons: Remove dates that fall on public holidays. (Use the List Holiday Dates button to check which holiday dates are set for your U3A.)
    - **Cancel link**: Mark that an individual date has been cancelled.
    - **Reinstate link**: Reinstate an individual date has been cancelled.
    - **Delete link**: Delete an individual date completely.
    - **Update Weekly Class Dates button**: Fill in the dates list with a date every week. This button is only shown if there are no dates set.



Enrol date	Cancelled		
02/01/2020		Cancel	Delete
09/01/2020		Cancel	Delete
16/01/2020		Cancel	Delete
23/01/2020	Y	Reinstate	Delete
30/01/2020		Cancel	Delete

Changes made on this screen are automatically saved.

7. Click the Close button when finished.

Edit a course

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin).
Level 7 (Advanced Tutor) can usually do this just for their own courses.

1. Find the course in the course list view (View Courses).

View or select Courses

2. Click the Edit link for the course (2nd last column).
3. On the Edit Course screen, edit the course details as required.
4. To save your changes, click the Save button near the bottom of the screen.

Add or edit a course location (venue)

Which access levels can do this?

Level 1 (Admin plus set up Courses).

To add or edit a location,

1. Go to the course list view (View Courses).

   View or select Courses

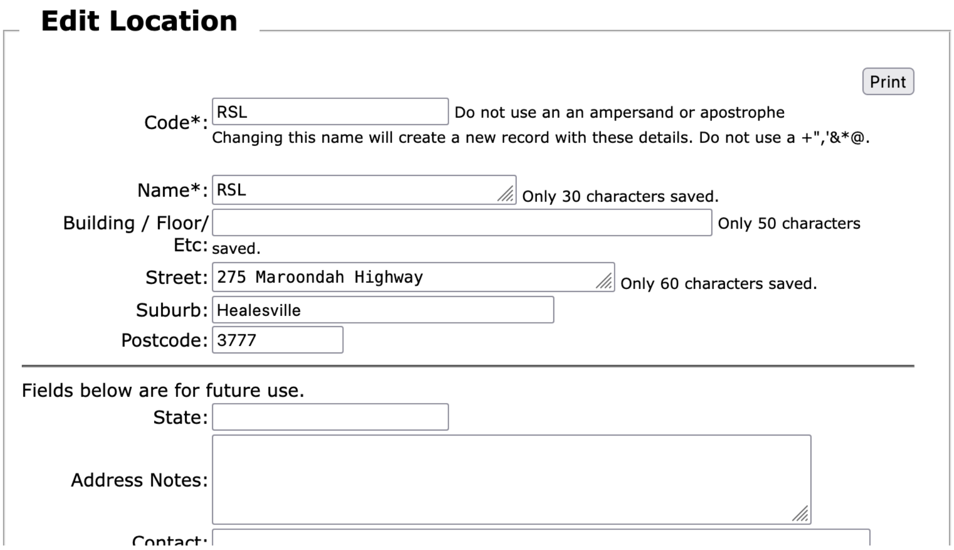
2. Scroll down to the bottom of the screen, and click the List Locations button.
   Note: this button is also available at the bottom of the Course Details view for each individual course.
3. The Locations list will be displayed:

   Location

Code	Name	Address	Suburb	
Golden Wattle	Golden Wattle	1 Joffre Road	Healesville	Edit
Library	Library	110 River Street	Healesville	Edit
Lions Club Hall	Lions Club Hall	9 Lilydale Road	Healesville	Edit
Maroondah Retirement	Maroondah Retirement	9 Don Road	Healesville	Edit
Outdoors variable	Outdoors variable			Edit
Private Home	Private Home			Edit
Queens Park	Queens Park	Maroondah Highway	Healesville	Edit
RSL	RSL	275 Maroondah Highway	Healesville	Edit
Senior Citizens Hall	Senior Citizens Hall	Cnr River/Green Sts	Healesville	Edit
The Court House	The Court House	42 Harker St	Healesville	Edit
Variable	Variable	Various Theatres		Edit

   Add a new Location

   - **To add a new location,** click the Add a New Location link below the list.
   - **To edit an existing location,** click the Edit link on the right side of the appropriate row.
4. Whether adding or editing a location, the next screen will be similar:



- **Code** is required. This is the venue ID. The code must be unique, and it must not contain an ampersand (&) or apostrophe.
  Note: If editing an existing venue, changing the Code will cause a new venue to be created with the new code.
- **Name** is required.
- **Street**, **Suburb** and **Postcode** are optional, but should be filled in for most venues: These details will be displayed when hovering the mouse over the Location column in the course list.
  Examples of exceptions are venues that vary each week, or venues that are private homes (for privacy reasons).
- **Building/Floor/Etc.** is optional, as are the various fields in the "future use" section.

5. When finished, click the Save button to save the location.

Copy a course from one year to the next

Which access levels can do this?

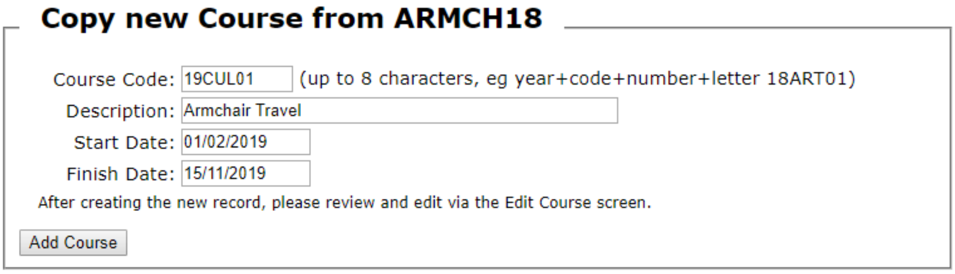
Level 1 (Admin plus set up Courses).

Heads up!

After copying the course, make sure you set up the dates for it. If you don't set up the dates, neither the Course Booklet function nor the Timetable function will work correctly for this course.

1. In the course list view (View Courses), find that course that you want to copy.
   Note: If the course to be copied is outside the date range shown in the course list, you can view courses in a different date range by setting the Dates between values at the bottom of the course list, and then clicking the List All Course button.

2. Click the name of the required course, to open up the Course Details view.
3. Click the Copy button on the top right.
4. On the Copy New Course screen, fill in basic details for the new course: The **Course Code**, **Description** (name/title), and **Start** and **Finish** dates.



5. Click the Add Course button.
6. The Course Details view for the new course will be displayed. The Frequency, Leader, course Type, Location (venue), Start Time, Finish Time, Maximum Enrolments, Comments (course detail) and Prerequisite details will have been copied from the old course.
7. If required, you can click the Edit Course button near the bottom, to edit the course.
8. Individual dates for the new course will *not* have been created, so you should click the Edit Dates for Course button to create the dates. (See step 6 under Add a New Course above for details on creating course dates.)

Close a course to new enrolments

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin).
Level 7 (Advanced Tutor) can usually do this just for their own courses.

1. Open the course for editing. (See Edit a Course in this user manual if required.)
2. Tick the Is this Course closed? checkbox.
3. Click the Save button near the bottom of the screen.

Restrict a course (i.e. enrolment needs approval)

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin).
Level 7 (Advanced Tutor) can usually do this just for their own courses.

Set the maximum enrolments for the class to zero. Members who want to enrol will be therefore be added to the waitlist. Approved enrolments can then be moved off the waitlist.

1. Set the **Maximum enrolments** field for the course to 0. (See Add a New Course or Edit a Course in this user manual as appropriate.)
2. (When a member enrols, they will be added to the waitlist.)
3. To move an approved member off the waitlist, see Move member from waitlist to course in this user manual.

Move member from waitlist to course

Which access levels can do this?

Level 1 (Admin plus set up Courses).
Level 2 (Admin), using Method 2 (below).
Level 7 (Advanced Tutor) can usually do this just for their own courses, using Method 2 (below).

1. If the course is already full, you first need to edit the course, increasing the Maximum Enrolments number so that there is a space available for this member. See Edit a Course in this user manaul.

2. Next, the member can be moved off the waitlist either from the member's record or from the course enrolments list:
   Method 1 - from the member record:

   a. Open up the Member Details view for the member. (See Find a member's details in this user manual.)
   b. Waitlisted courses will be displayed near the bottom of the Member Details view: Click the Edit link to change wait list status.

      On a Wait list

Start Date	Time	Code	Description	
04/02/2019	12:00	CARD19	Card Making	Edit

   c. On the Edit Member Enrolment screen, click the Un-Wait button.
   d. You'll see a confirmation message: Click Yes to confirm. The member's enrolment status for this course will be changed from waitlisted to enrolled.

   Method 2 - from the course enrolments list:

   a. Find the course in the course list view (View Courses).
   b. Click the Rep link for the course (last column). Alternatively, click the course name to open the details view, and then click the List Enrolments button on the details view.
   c. Click the Wait link in the member's row.

Enrolment List

Course: HISTRY19 **History of Healesville**
Dates: **07/10/2019 - 13/12/2019** Time: **14.00 - 15.00** Day: **Mon**
Venue and Leader: **The Court House - Sally Tutor**

Enroll Date	Time	Member#	Name	Mobile	(...)	
17/12/2018		1004	Lou Member	0400 123 456		Delete
17/12/2018		1003	Lizzy Member	0415 333 444		Delete
04/02/2019	09:00:09 AM	1379	Dewi Sulianti			Wait Delete
04/02/2019	09:37:33 AM	1380	Alf Ricci			Wait Delete

Total number of records is 4
Maximum number is 3, Enrolled is 2, Available is 1
To enrol a wait listed enrolment click on the 'wait' link.

Remove a member from a course

Which access levels can do this?

Level 1 (Admin plus set up Courses).
Level 2 (Admin) can do this using Method 2 (below).
Level 5 (Treasurer) can do this using Method 1 (below).
Level 7 (Advanced Tutor) can usually do this just for their own courses, using Method 2 (below).

Heads up!

If the course has a wait list and a member is removed, check a vacancy is not made available for another member to enrol and bypass the wait list.

There are two ways of doing this: Either from the member's record, or from the course enrolments list.

Method 1 - from the member record:

1. Open up the Member Details view for the member. (See Find a member's details in this user manual.)
2. Go to the **Enrolments and subscriptions** list near the bottom of the screen.
3. Click the Edit link next to the required course.
4. On the Edit Member Enrolment screen, click the Delete button.
5. You'll see a confirmation message: Click Yes to confirm. The member's enrolment status for this course will be changed to deleted.

Method 2 - from the course enrolments list:

1. Find the course in the course list view (View Courses).

   View or select Courses

2. Click the Rep link for the course (last column). Alternatively, click the course name to open the details

view, and then click the List Enrolments button on the details view.
3. Click the Delete link in the member's row.

Enrolment List

Course: HISTRY19 **History of Healesville**
Dates: **07/10/2019 - 13/12/2019** Time: **14.00 - 15.00** Day: **Mon**
Venue and Leader: **The Court House - Sally Tutor**

Enroll Date	Time	Member#	Name	Mobile		
17/12/2018		1004	Lou Member	0400 123 456	(...)	Delete
17/12/2018		1003	Lizzy Member	0415 333 444		Delete
04/02/2019	09:00:09 AM	1379	Dewi Sulianti			Wait Delete
04/02/2019	09:37:33 AM	1380	Alf Ricci			Wait Delete

Total number of records is 4
Maximum number is 3, Enrolled is 2, Available is 1
To enrol a wait listed enrolment click on the 'wait' link.

When a member is removed from a course:

- The member and tutor will normally receive an email notification (depending on system settings)
- The course will be displayed in red text in the member's enrolments list

Reinstate a member to a course

Which access levels can do this?

Level 1 (Admin plus set up Courses), Level 5 (Treasurer).

1. Open up the Member Details view for the member. (See Find a member's details in this user manual.)
2. Go to the **Enrolments and subscriptions** list near the bottom of the screen.
3. Click the Edit link next to the required course.
4. On the Edit Member Enrolment screen, click the Un-Delete button.
5. You'll see a confirmation message: Click Yes to confirm. The member's enrolment status for this course will be changed to enrolled. The member and tutor will normally receive an email notification (depending on system settings).

Absence management

Detailed instructions are available in a separate document.

In brief, if this feature is turned on in System Settings then members (and volunteers on behalf of members) can report their upcoming absences. When available, absence management can be accessed through the Report Absence link in the left side menu.

Report Absence

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For Membership Managers

U-MAS Access Levels

Different U3As give their office-bearers different levels of access. This guide assumes that a membership manager has level 1 (Admin Tier 1) access. The features and menu items available to you in U-MAS may vary if you have a different level of access.

Email members

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin), level 3 (Reception), level 5 (Treasurer), level 6 (Volunteer).
Level 4 (Tutor) and level 7 (Advanced Tutor) can usually email participants in courses that they tutor.

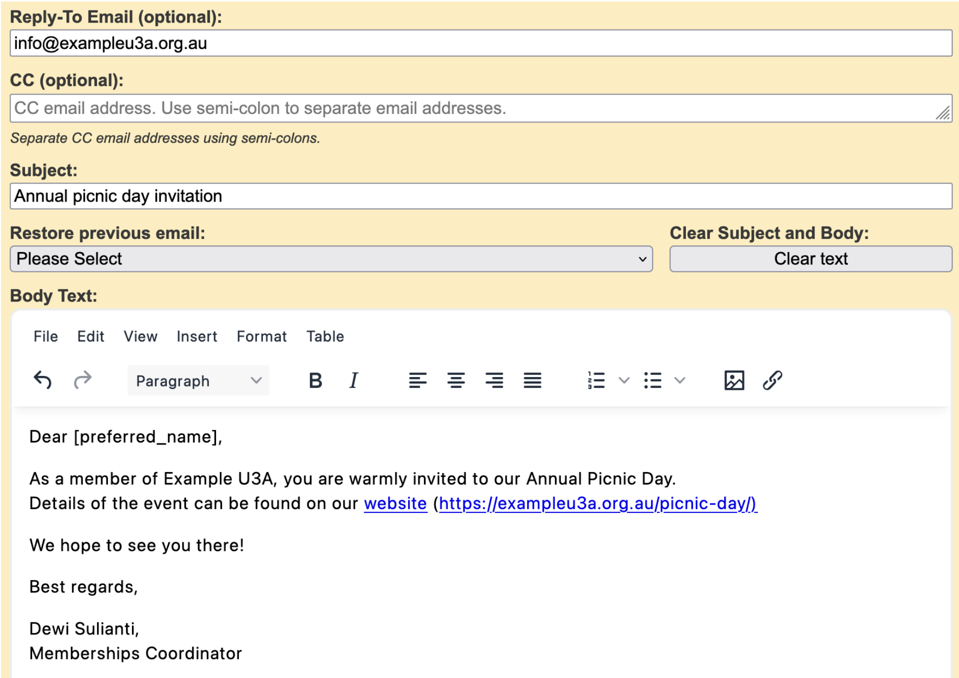
1. Click the Send Emails link in the left side menu.
   

2. On the Send Emails screen, you will usually want the Members tab.
   (The Subscriptions tab is for emailing members according to their subscription end date and Active/No Active membership status, and the Enrolments tab is for emailing members who are enrolled in a selected course.)

3. Configure the email:

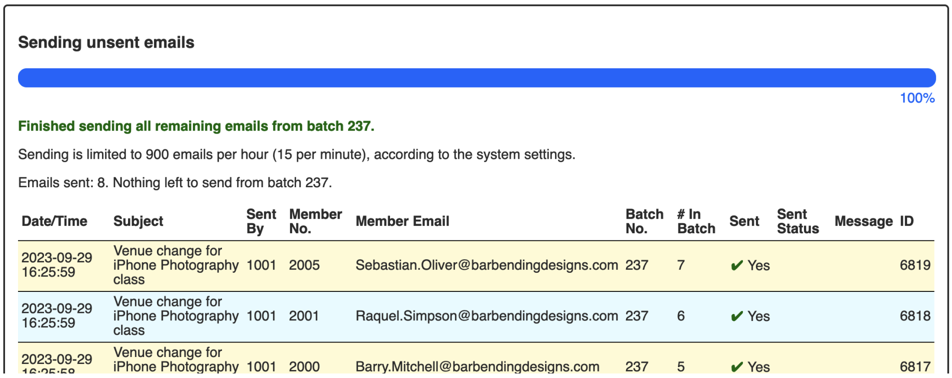
   - In the first text field, you can add a custom **reply-to** email address.
     Note: The email will be sent from the U3A's general email address, and if a custom reply-to address is not set, the reply-to address will be the general address.
   - Add a CC address(es) if required, in the second field.
   - Fill in the **Subject** field.
   - Fill in the **email body**.
     Note that you can use:
     - A range of formatting options and elements, such as headings, paragraphs, lists, tables, web links, and images: Some common options are available on the toolbar, and many more can be found in the Insert and Format menus.
     - Mail merge fields, in order to personalise the emails: The available fields are shown near the bottom of the screen. A mail merge field must be inserted in **square brackets**, like [this]. The following screenshot shows use of the [preferred_name] field.
   - If you want to use an email that you have previously sent as a base, you can select from the emails available in the "Restore previous email" dropdown: This will fill the reply-to, subject, and email body

fields with the content from the selected previous email.



4. Below the email settings, you can choose which members to send to:
    - Choose whether to send to Active, Inactive, or All members. (Use Inactive or All with caution.)
    - Enter the member number range to send to.
    - Optionally, enter a membership subscription expiry date range, to send only to members whose most recent subscription expired/will expire within that range.
    - Optionally, select a Member Type to send to.
    - Optionally, select a file attachment to include.
5. Click the **Send member emails** button when ready.
6. You'll see a confirmation message: Check that the details are as expected, including the number of emails to be sent and the information regarding any attachments.
   If everything looks ok, click Yes to confirm and send the email (you can choose to display sending progress either in the same browser tab or a separate one).
7. The Bulk Email Progress page will be displayed, showing the sending progress. Wait until the progress bar reaches 100%, showing that all emails have been sent: **Do not** close the tab/browser window before sending has finished, as this will stop the sending process. Generally, sending will be quite quick, but may be slower if you have included an attachment, if you sent the email to a lot of members, or if your U-MAS admin has configured the system to send slowly.

Bulk Email Progress



Decease a member

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin).

1. Open up the Member Details view for the member. (See Find a member's details in this user manual.)
2. Click the Decease this member button near the bottom of the screen.
3. You'll see a confirmation message: Click Yes to confirm.
4. On deceasing a member, the following changes are automatically made to their member record:
   - Email address changed to the common email address (as used for members who do not have an email address).
   - Membership status changed to Not Active.
   - An appropriate note added to their record.
   - Removed from the tutors list, if the member was a tutor.
   - Removed from any enrolled courses. The tutor may receive an email notification, depending on system settings.

Delete a member completely

Which access levels can do this?

Level 1 (Admin plus set up Courses).

Delete or deactivate?

Some U3As have a policy of never deleting members. Instead, these U3As may decide to simply change a member's status to Inactive when appropriate. The button to "Inactivate this member" is on the same screen as the delete button (below).

1. Open up the Member Details view for the member. (See Find a member's details in this user manual.)
2. Click the Delete this member button near the bottom of the screen.
3. You'll see a confirmation message: Click Yes to confirm.

Member name badges

Detailed instructions are available in a separate document.

In brief,

- Name badges can be printed for multiple members at once, from Reports - Members.
- If turned on in System Settings: Members who have an active membership for the current year can print their own name badges, using the Create a Name Badge button underneath the enrolments list on the View Member Details screen.

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For Treasurers

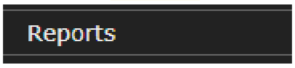
U-MAS Access Levels

Different U3As give their office-bearers different levels of access. This guide assumes that a treasurer has level 5 (Treasurer) access. The features and menu items available to you in U-MAS may vary if you have a different level of access.

View or print cash (non-PayPal) receipts report

Which access levels can do this?

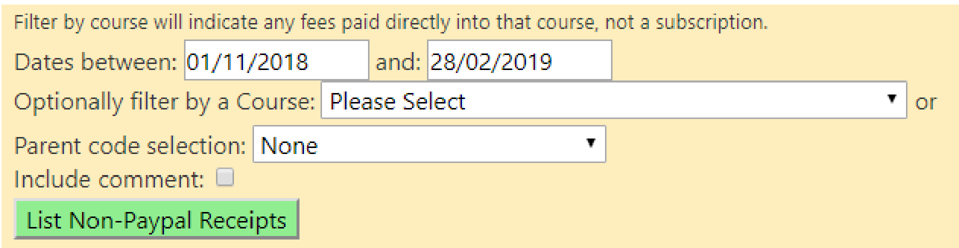
Level 1 (Admin plus set up Courses), level 2 (Admin), level 5 (Treasurer).

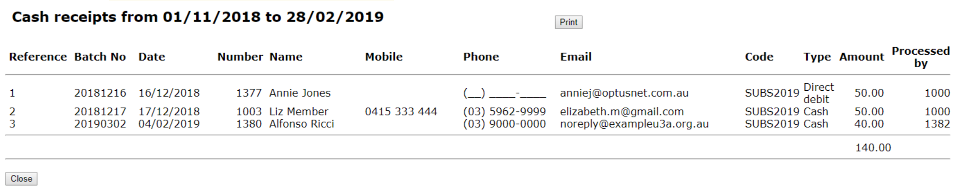
1. Click the Reports link in the left side menu.
   

2. On the Reports screen, go to the Financials tab.

3. Fill in the settings for the top report:

   - **Dates between**: Report on payments made within this date range. (If no dates are entered, the report will cover the past 120 days.)
   - Optionally, you can choose to only include payments made for a selected course, or for courses within a selected category (parent code).
   - Optionally, you can choose to inlcude any comments made on the payments.

4. Click the List Non-Paypal Receipts button: The report will be displayed.
   

   Cash receipts from 01/11/2018 to 28/02/2019 Print

Reference	Batch No	Date	Number	Name	Mobile	Phone	Email	Code	Type	Amount	Processed by
1	20181216	16/12/2018	1377	Annie Jones		(__) ____-____	anniej@optusnet.com.au	SUBS2019	Direct debit	50.00	1000
2	20181217	17/12/2018	1003	Liz Member	0415 333 444	(03) 5962-9999	elizabeth.m@gmail.com	SUBS2019	Cash	50.00	1000
3	20190302	04/02/2019	1380	Alfonso Ricci		(03) 9000-0000	noreply@exampleu3a.org.au	SUBS2019	Cash	40.00	1382
										140.00	

   Close

5. If you need to print the report, click the Print button. A new window will open containing just the report:

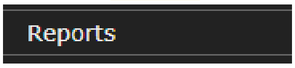
Click the Print button in this window to print the report.

View or print PayPal payments report

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin), level 5 (Treasurer).

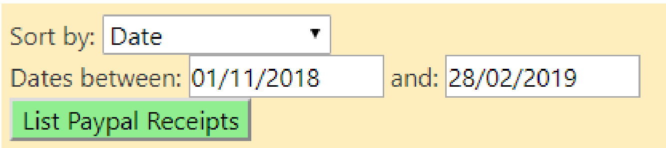
1. Click the Reports link in the left side menu.



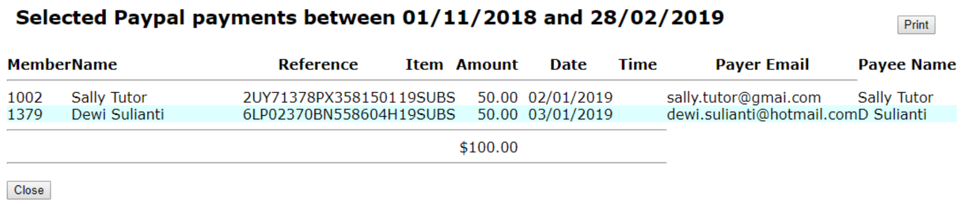
2. On the Reports screen, go to the Financials tab.

3. Fill in the settings for the third-from-top report:

   - Optionally, choose a sort order for the report. The default order is Date.
   - **Dates between**: Report on payments made within this date range. (If no dates are entered, the report will cover the past 120 days.)



4. Click the List Paypal Receipts button: The report will be displayed.



Selected Paypal payments between 01/11/2018 and 28/02/2019

Print

Member	Name	Reference	Item	Amount	Date	Time	Payer Email	Payee Name
1002	Sally Tutor	2UY71378PX3581501	19SUBS	50.00	02/01/2019		sally.tutor@gmai.com	Sally Tutor
1379	Dewi Sulianti	6LP02370BN558604H	19SUBS	50.00	03/01/2019		dewi.sulianti@hotmail.com	D Sulianti
				$100.00				

Close

5. If you need to print the report, click the Print button. A new window will open containing just the report: Click the Print button in this window to print the report.

View or print unpaid enrolments report

Which access levels can do this?

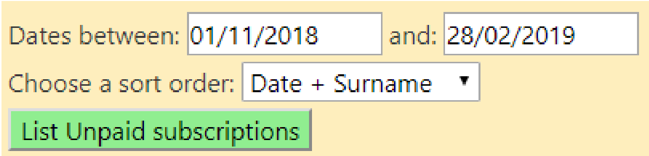
Level 1 (Admin plus set up Courses), level 2 (Admin), level 5 (Treasurer).

1. Click the Reports link in the left side menu.

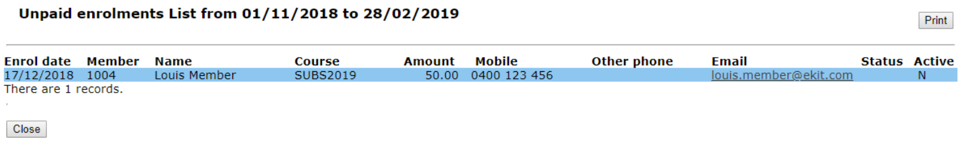
2. On the Reports screen, go to the Financials tab.

3. Fill in the settings for the third-from-bottom report:

    - **Dates between**: Report on enrolments within this date range.
    - Optionally, choose a sort order for the report. The default order is Surname.



4. Click the List Unpaid Subscriptions button: The report will be displayed.


Unpaid enrolments List from 01/11/2018 to 28/02/2019

Print

Enrol date	Member	Name	Course	Amount	Mobile	Other phone	Email	Status	Active
17/12/2018	1004	Louis Member	SUBS2019	50.00	0400 123 456		louis.member@ekit.com		N

There are 1 records.

Close

5. If you need to print the report, click the Print button. A new window will open containing just the report: Click the Print button in this window to print the report.

Record that a member has paid

Which access levels can do this?

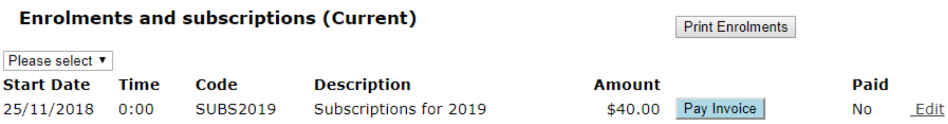
Level 1 (Admin plus set up Courses), level 5 (Treasurer).

Self-Service Payments

Many U3As offer self-service payments, where members can pay their invoices within U-MAS for Members using PayPal. You don't need to manually record such payments, as U-MAS will do it automatically.

1. First, select the required member in U-MAS: See Find a member's details in this user manual.

2. At the bottom of the Member Details screen, you'll find the member's Enrolments and Subscriptions list.


Enrolments and subscriptions (Current)

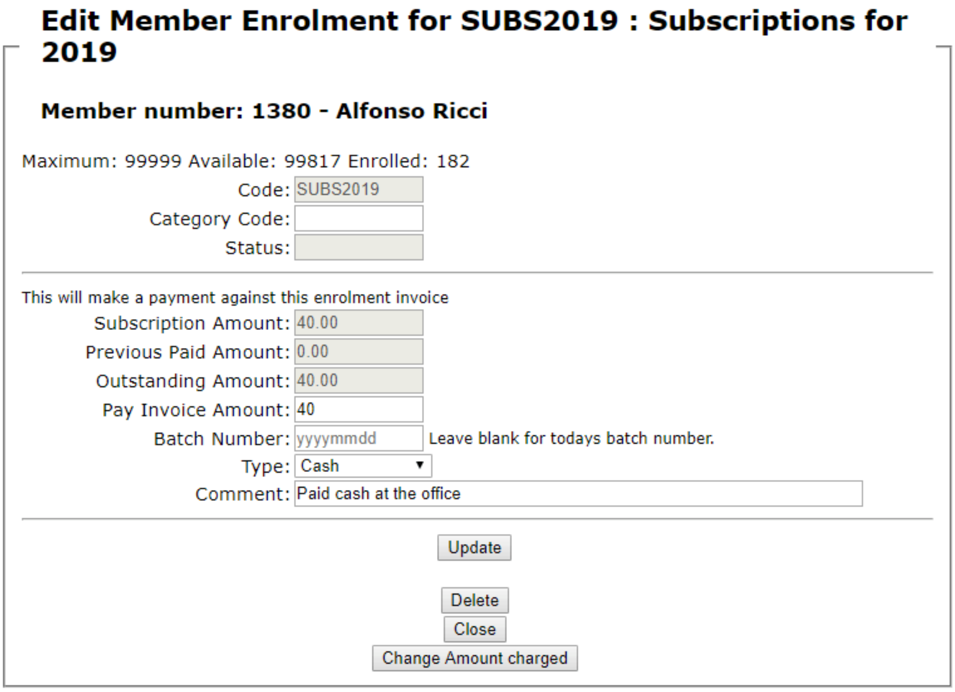
Print Enrolments

Please select

Start Date	Time	Code	Description	Amount		Paid	
25/11/2018	0:00	SUBS2019	Subscriptions for 2019	$40.00	Pay Invoice	No	Edit

3. If the member hasn't paid their subscription, the Paid column for that subscription will read "No". Click the Edit link to record their payment.

4. On the Edit Member Enrolment screen, enter the payment details:
    - **Pay Invoice Amount**: Enter the amount that was paid.
    - **Batch Number**: Enter the date that the payment was made, in yyyymmdd format. (Optional: leave blank to use today's date.)
    - **Type**: Select the payment type, e.g. "Cash".
    - **Comment**: An optional short note about the payment.



5. Click the Update button to finish.