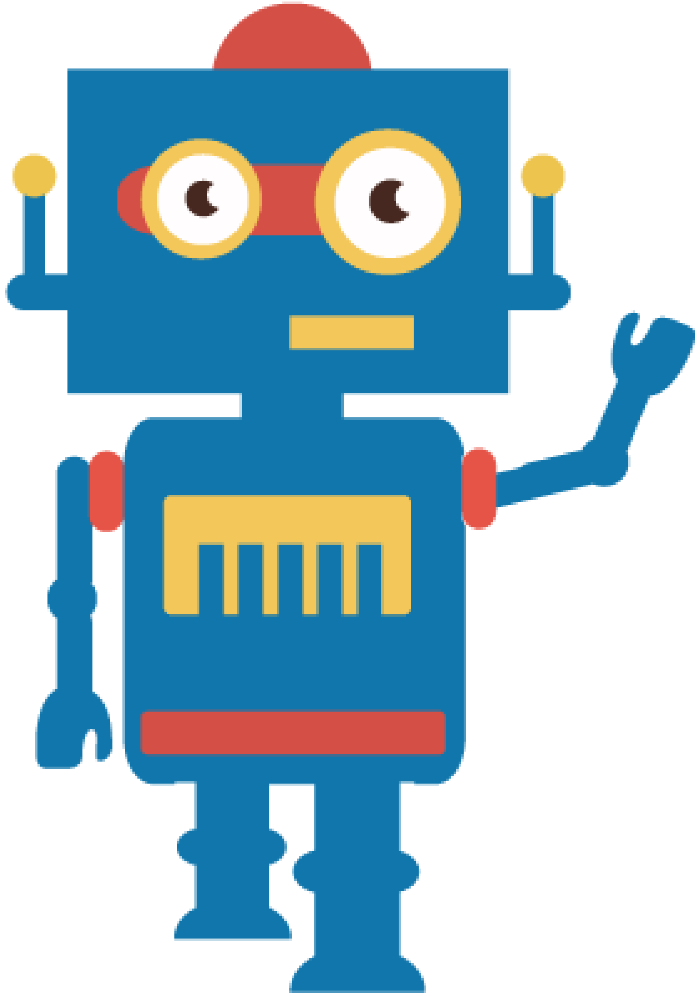
WebLink 2015 SUMMIT

Revenue Reporting Best Practices

#WLSummit

Meet the Presenters



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To get good date out…

Put good data in!

Accounting Package Setup

- Create Accounting Package(s) even if you’re not integrating
- Enter all of your GL Account Codes
- Use only the accounts you will need – *avoid clutter*

Best Practices for Billing

- Create revenue items strategically
- Maintain a consistent billing process
- Use batches for tracking
- Use default dates whenever possible
- Write off invoices promptly

Posting

- Post daily, or at least weekly
- Post in as few batches as possible
- Periodically check for past unposted transactions

Daily/Weekly Reporting

Recommended Reports to run Daily/Weekly

- Credit Card Transactions
- Cash Receipts
- Aging by Revenue Item as of Specified Date
- Batch Posting Report

Monthly Reporting

Other Search Tools

- Financial Dashboards
  - My Dashboard
  - Browser Home Dashboard
- Invoice/Payment Selectors
- Data Export/Reporting Tool

The Big Picture

Reports to Analyze Your Revenue

- Revenue by Type
- Dues vs. Non-Dues Revenue
- New Member Income
- Member Segmentation
- Two-Year Comparisons

Online Resources

WebLink University

www.weblinkuniversity.com/revenue/revenue.aspx

WebLink Support Knowledge Base

www.weblinksupport.com