



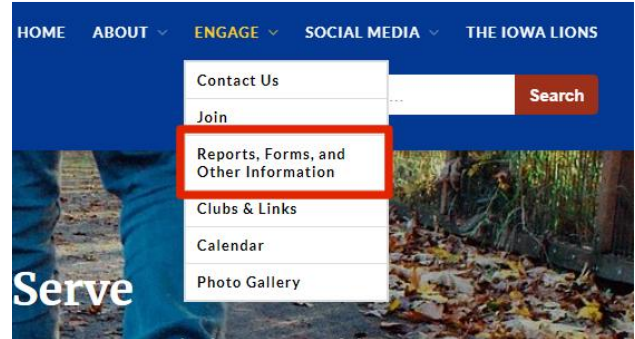
LIONS CLUB INVOICE GUIDELINES



Iowa Lions District 9SW Invoice Template

PURPOSE: This template is designed to support a club in the collection of funds. Two examples that come to mind are collection of dues and invoicing a donor for promised funds. We are sure you will find other uses for this template.

FORM ACCESS: Go to www.iowalions9sw.org and hover over the **ENGAGE** tab. You will see a dropdown list appear. Select **Reports, Forms, and Other Information**.



FORMS

9SW [Care & Share Guidelines](#)

9SW [Care & Share Application](#)

9SW [Hearing Aid Application](#)

9SW [Lions Club Invoice Form](#) – Read the [Guidelines](#)

9SW [Official Governor’s Visit Request Form](#)

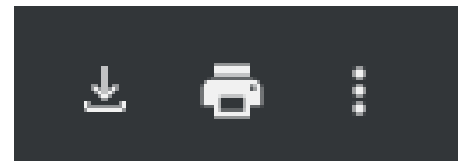
LCI [Membership Application Form](#)

Iowa Lions Foundation [Personal Donation Form](#)

Select the **Lions Club Invoice Form**. Guidelines will also be available.

The form will be brought to your screen on a separate tab. (See the last page of this document for a view of the empty form).

At the upper right corner of the screen, you will see a **download** icon (left) and a **print** icon (center).



At this point you may either:

- **Print** out the empty form for using to manually fill in the form with pen and paper.
- **Download** (save) the empty form to your computer in your chosen folder. You may then use Adobe Acrobat Reader to input fields and save new files under new names for printing. If you don’t already have Adobe Acrobat Reader, the download is **FREE** at: [Adobe - Download Adobe Acrobat Reader](#)
- **Update** your information using the form online. You can now either
 - **Print** your completed form directly to your printer (**RECOMMENDED**). Now you can go back to only the fields that need to be changed, and print your next set of invoices, etc.
 - **Download** (save) your page. You will be asked if you want to download the completed or uncompleted form. Download it as mentioned above. You will then be able to modify it with Adobe Acrobat Reader or print it as a PDF file to your printer.



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GENERAL DESCRIPTION OF THE TEMPLATE:

1. The form consists of 3 individual invoices which can be completed to invoice multiple entities. Each form can be printed and cut along the line as designated by the scissors symbol.
2. Each individual Invoice consists of 3 sections
 - a. The top section contains information about the invoice itself
 - i. Who the invoice is from
 - ii. What is being invoiced
 - iii. When the invoice is being sent
 - iv. How much the invoice is for (amount requested)
 - b. Below that, on the left is the treasurer's information. This consists of who and where the payment is to be sent, and a phone number to reach the Treasurer
 - c. To the right of the Treasurer's information is the information for the Entity being invoiced (Dues for a Lion or any Other entity).
3. Moving around the form should be simple.
 - a. When you hover over any field, a description will pop up.
 - b. "Copy & Paste" is available from all fields.
 - c. You can click into any field to input information.
 - d. Use the <tab> key to move sequentially between fields.
 - e. To back up to the previous field, you may hold down the <shift> key and press <tab> key.
 - f. You can click on the radio buttons to select either DUES or OTHER option.
4. Upon completion of the document, you may either print the document or save the document on your own computer as was discussed on page 1.

FIELD EXPLANATIONS AND USAGE:

1. **"Make Check Payable To:"** - The top, or 1st line, of the invoice is for your club's name, example: The Great Norwalk Lions Club.
2. **"Invoice Description:"** – This is the reason for the invoice (example Dues, or Kidsight pledge).
3. **"Invoice Date:"** –
 - a. Format = mm/dd/yyyy.
 - b. The year MUST BE 4 digits.
 - c. Month and Day can be 1 digit or can have lead zero (May 1st can be entered as "5 1" or "05 01", either way the result will be "05/01").
 - d. Separator can be a space, a "/", a "-" or any combination of these.
4. **"Invoice Amount: \$"** –
 - a. Will auto fill a decimal and two zeros. Example: enter 100, the value returned is \$100.00
 - b. Will auto fill a zero when necessary. Example: enter 100.2, the value returned is \$100.20
5. **"From Club:"** - Left Side
6. **"Name:"** - Treasurer's Name
7. **"Address:"** - Club Address or Treasurer's Address
8. **"City, State, Zip:"** - Club Address or Treasurer's Address



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9. **"Phone:"** - Treasurer's Phone Number, enter 10 digits & it will returned edited:
 - a. Example: 1112223333 will return (111) 222-3333.
 - b. Example: 111-222-3333 will return (111) 222-3333.
10. **"Payment for:"** - Right Side
11. **"Dues or Other Buttons"** –
 - a. Dues is preselected as this will likely be the most used
 - b. You will need to mouse to and click the Other button when necessary
12. **"Name:"** - Name of Lion or Entity being invoiced
13. **"Address:"** - Address of Lion or Entity being invoiced
14. **"City, State, Zip:"** - Address of Lion or Entity being invoiced

NOTE: The auto-fill format (for dates, dollars, and phone numbers) does not seem to work for all computers. If it does not work for you, just input the dashes ("-"), slashes ("/"), and decimals (".") accordingly.

SUGGESTION BEFORE FILLING OUT YOUR FORM:

Gather the member names and addresses together and prepare to type them into an editable Member data file, such as a Word document or table (.doc or .docx), and Excel datasheet (.xls or .xlsx), or a plain text file using an app such as Notepad (.txt). Any editable file will work.

- At the top of the page, enter your club's name ... as you want it to appear on your document.
- After that line, add the name and address and phone number for the Club Treasurer.
- Follow that information with the names and addresses of all the other members.

Now, all you have to do is copy the information (from you Member File) and paste this information into the correct fields on your form. When the dues are to be collected again in 6 months, all you need to do is add any new members to your Member data file and proceed with cutting and pasting to the invoice form.



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Iowa Lions District 9SW Invoice Template



View of Lions Club Invoice form as it appears online

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Make check payable to: _____

Invoice Description: _____

Invoice Date: _____ Invoice Amount: \$ _____

From Club: _____ **Payment for:** Dues Other

Name: _____ Name: _____

Address: _____ Address: _____

City, State ZIP: _____ City, State ZIP: _____

Phone: _____

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Make check payable to: _____

Invoice Description: _____

Invoice Date: _____ Invoice Amount: \$ _____

From Club: _____ **Payment for:** Dues Other

Name: _____ Name: _____

Address: _____ Address: _____

City, State ZIP: _____ City, State ZIP: _____

Phone: _____

----- ✂ -----

Make check payable to: _____

Invoice Description: _____

Invoice Date: _____ Invoice Amount: \$ _____

From Club: _____ **Payment for:** Dues Other

Name: _____ Name: _____

Address: _____ Address: _____

City, State ZIP: _____ City, State ZIP: _____

Phone: _____