

How do I set up an Alternate Billing Address?

Version 4.0

Please note that Alternate Billing Address is only available for contacts with memberships.

There are two scenarios in which using the Alternate Billing Address may be fitting.

Scenario 1: If you have a Contact record entered for each member of a couple you can set up the two records so that a letter, label and/or envelope is addressed to both people, rather than sending a piece of mail to each person. For example, John and Mary Smith each have their own Contact records, but are both part of one Family Membership. You can send one mailing to them together, addressed to them as a couple. In this example you create the alternate billing address for the Bill To Member of the membership.

Scenario 2: One piece of mail, such as a renewal letter, may need to go to a person or address that is not the one listed on the Contact record. For example, Jane Brown purchased a membership for her father, Joe Brown. Jane wants to receive the renewal letter for the membership, but she wants her father to receive the newsletter and any other mailings the museum sends out. In this example you would put the alternate billing address on Joe's record.

To set up the Alternate Billing Address after the contacts have been entered and the memberships set up:

1. Click the "Membership" tab on the Contact record.
2. Click "Enter or Change Alternate Billing Address."
3. Click "Edit" at the bottom of the window that appears.
4. Enter the person/couple's name and address as you want it to appear on mailings in the Primary-Alternate Address for Membership Billing field.

Scenario #1

Mr. & Mrs. Smith
300 N Pottstown Pike
Exton, PA 19341

Scenario #2

Jane Brown
300 N Pottstown Pike
Exton, PA 19341

5. Check the box at the top of the window labeled "Check this box to send membership bills and notices to the address below."
6. Enter the information for the alternate Dear name, email and phone numbers, if applicable.
7. Click "Save."
8. Click "Exit."

If you would like to use the Alternate Billing Address on any of your letters, labels or envelopes, you will need to set them up to use the alternate billing address fields. Once you've set this up, the Alternate Billing Address will be used when printing those letters and

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labels. If a record does not contain an Alternate Billing Address, PastPerfect will use the regular address that is on that Contact record.

If you have any questions, please contact our Support Office at 1-800-562-6080 or email support@museumsoftware.com. Thank you for using PastPerfect!