

# Week nine – All things finance

## Task 1: Set up your payment methods

To be able to take payments for anything through the Platform (membership fees, donations, or merchandise) you first need to set up payment options on your site.

Your payment settings can be found in the **Website and Configuration page** (cog in top right-hand corner and top cog) of your website under the payment tab.

More information about setting payment methods up can be found in our [Finances in the Making Music Platform](#) guide.

## Task 3: Set up Gift Aid reporting

If you claim gift aid on member subscriptions, then you can use the gift aid reporting function to break down invoices and show how much gift aid is allocated.

You would first need to enable the gift aid module in the **Website and configuration page** and use the instructions in our [gift aid reporting](#) guide

## Task 5: Selling merchandise

The Platform allows you to sell merchandise in the form of physical items such as CDs as well as downloadable merchandise e.g. recordings of the groups performances.

Information on enabling and setting up the merchandise module can be found in our [Finances in the Making Music Platform](#) guide.

For downloadable merchandise you will need to provide a link to where people can download the item. If they have paid by BACS or cash then this link will only be emailed to the purchaser once you have manually marked the order as being paid and sent an update to the purchaser by going to the **Administration Dashboard** and looking under the Financial section for the link called **Orders/Invoices/Bookings/donations**

## Task 2: Set up member invoicing

The Platform allows you to invoice members for subscription fees. Information on how to do this can be found in our [Finances in the Making Music Platform](#) under the **member invoicing and gift aid reporting** section

There are different aspects to setting up member invoicing including creating a fee structure, enabling the member invoicing module through your **Website and configuration page**, selecting who will be managing the invoices and then setting up a fee structure for each of the members. Once this has been set up you can then create invoices for members. If you collect gift aid on subscriptions please also read the next task before creating the invoices for members.

You can also manually create ad hoc invoices by going to the members record in the **Member List** and clicking on the **create one ad hoc invoice for this member** button

## Task 4: Accepting donations

The Platform allows you to take donations for your group as well as any other causes you may also be collecting for.

Information for accepting donations via the Platform can be found in our [Finances in the Making Music Platform](#) guide.

Once this has been set up you can then view donations which have been made to the group by going to the **Administration Dashboard** and looking under the Financial section for the link called **Orders/Invoices/Bookings/donations**. This information can also be exported.

## Task 6: Selling event tickets

If you haven't already added events then go to week six of this project plan.

Instructions for enabling the module to sell tickets can be found in our [Events in the Making Music Platform](#) guide under the **Adding Events in the Platform** section. You can sell tickets for different prices based on various criteria. Once set up then those who have booked tickets and paid by card will automatically be sent their tickets in an email. If they have paid by BACS or cash then you will need to mark the payment as fulfilled and send an update to the customer for them to receive their tickets. This can be done in the **Administration Dashboard** under the financial section by clicking on the link called **Orders/invoices/bookings/donations**.