

# GrowthZone NAR Ecommerce Training



# Agenda

Overview of NAR Ecommerce Integration

Initial Setup

Adding Memberships

Storing Credit Cards

Running Upcoming Billing

Review/Resend Over-due Invoices

Process Refunds

Payment Processing Report

GrowthZone provides integration with NAR E-Commerce. Through this integration you can:

- Easily handle splits of membership dues. You will have the ability to indicate distribution parameters and NAR will send along those amounts to state and national appropriately
- Store cards in the back office for future use and allow your members to store cards via the Info Hub
- Setup autopay for recurring purchases on stored cards
- Process refunds through the GrowthZone backoffice
- Handle declined charges and receive notification of card processing failures

## How it works:

- Setup good/services for local, state, and national
- Configure which good/services on a membership type go to state, national, association
- When a payment is processed, distribution parameters are sent to NAR ECommerce

InDevelopment

### Real Estate Finance Settings

Save

#### NRDS Splits

Leave Association Bank ID blank to go to default bank account for Association.

#### Split Settings

Saleable Item	Split Association	Association Bank ID	
National Dues	National		+
State Dues	MN		x
Local Association Dues	Association		x

#### NRDS Financial Mapping

Create Your Mappings Here.

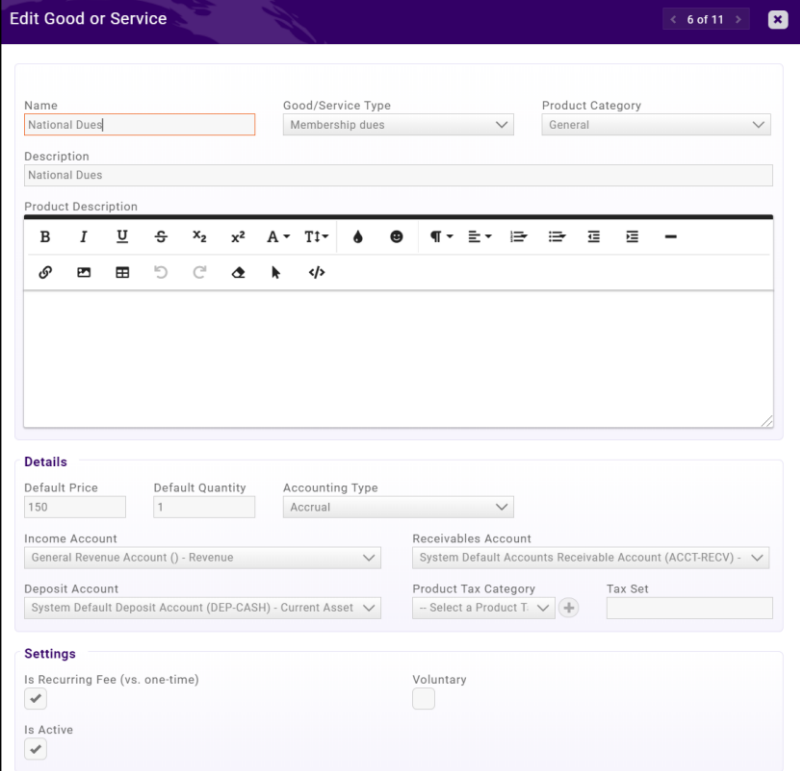
#### Financial Mapping

Saleable Item	NRDS Payment Type	
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## Setup Goods/Services

- Goods and Services allow you to define the “products” for the memberships, services and products you provide
- Among other things, you will setup a goods/service for each of the split items.  
For example: A National Dues goods/service
- WIKI: [Setup Goods/Services](#)



**Edit Good or Service** < 6 of 11 > [X]

Name: National Dues | Good/Service Type: Membership dues | Product Category: General

Description: National Dues

Product Description

**Details**

Default Price: 150 | Default Quantity: 1 | Accounting Type: Accrual

Income Account: General Revenue Account () - Revenue | Receivables Account: System Default Accounts Receivable Account (ACCT-RECV) -

Deposit Account: System Default Deposit Account (DEP-CASH) - Current Asset | Product Tax Category: -- Select a Product T... | Tax Set: [ ]

**Settings**

Is Recurring Fee (vs. one-time):  | Voluntary:

Is Active:

## IMPORTANT

- GrowthZone only supports splits **at the time of payment**. You are unable to use E-Commerce to process monthly membership payments and then send a lump sum annually to state and national
- E-Commerce will support up to 6 destination bank accounts, if just one account is being used, the splits will not need to be configured
- There are many specific rules & regulations for E-Commerce. Please contact NAR with questions

# Membership Type Setup

- Ties the goods & services together to make up pricing for a membership type
- Good/services used in the split should be included in the membership types
- WIKI: [Understanding Membership Types](#)

Edit Membership Billing - Realtor < 1 of 5 > ✕

Payment Gateway: -- Select a Payment Gateway --  
Invoice Template: -- Select an Invoice Template --  
Payment Terms: -- Select a Payment Terms --  
Terms/Conditions: -- Select a Terms/Conditions --

Formula Based Pricing

Does your Membership have pricing levels? Enter the base price below (if any). Then enter your pricing on the Levels screen for this Membership Type.

**Recurring Fees**

Item	Description	Price (12 mos.)	
Local Association Dues	Realtor Association Dues	75	<a href="#">Billing Options</a>
National Dues	National Dues	150	<a href="#">Billing Options</a>
State Dues	State Dues	100	<a href="#">Billing Options</a>

\$325.00

# Add Membership

When a member joins your organization, you will select the membership type created with the split items

WIKI: [Add Membership to Contact](#)

### Add Membership

**Details**

Office/Agent: Josie West  
Membership Type: Realtor Membership  
Chapter: -- Select a Chapter --  
Frequency: Annually  
Courtesy:

Sales Rep: -- Select a Sales Rep --  
Join Reason: -- Select a Join Reason --  
Referred By:

**Fees**

Item	Description	Price	Hide	Term (Mo.)	Tax	Amount	Frequency	per Bill Disc	per Bill Amt
Local Association Dues	Realtor Association Dues	75	<input type="checkbox"/>	12	\$0.00	\$75.00	Annually	0.00(0)	\$75.00
National Dues	National Dues	150	<input type="checkbox"/>	12	\$0.00	\$150.00	Annually	0.00(0)	\$150.00
State Dues	State Dues	100	<input type="checkbox"/>	12	\$0.00	\$100.00	Annually	0.00(0)	\$100.00
Membership Setup	Membership Setup	500	<input type="checkbox"/>	12	\$0.00	\$500.00	One time	0.00(0)	\$500.00

**Invoice Options**

Print:  Email:   
Billing Address: -- Select a Billing Address --  
Billing Email: -- Select a Billing Email --  
Contact: -- Select a Contact --

Invoice Terms: Due on Receipt  
Invoice Message:

**Dates**

Membership Start Date: 6/24/2020  
Next Bill Date: 6/24/2020  
Expiration Date: 12/31/2020

Advanced Options  Cancel Done



# Add Membership

When a membership is added to a contact the system will automatically create a recurring fee schedule for upcoming billing

Scheduled Billing									
Description	Membership	Bill Contact	Frequency	Amount	Discount	Payment Profile	Start Date	Next Bill Date	End Date
<a href="#">National Dues</a>	Realtor		Annually	\$150.00	\$0.00	Visa:*****4242-3/2024	1/22/2020	1/22/2024	
<a href="#">State Dues</a>	Realtor		Annually	\$100.00	\$0.00	Visa:*****4242-3/2024	1/22/2020	1/22/2024	
<a href="#">Realtor Association Dues</a>	Realtor		Annually	\$75.00	\$0.00	Visa:*****4242-3/2024	1/22/2020	1/22/2024	

# Managing Membership Dues

- If authorized by the agent, you can associate a stored payment profile to membership dues
- When doing so, when upcoming billing is run, the credit card will automatically be charged

WIKI: [Apply Stored Credit Card to Recurring Fees](#)

# Managing Membership Dues Payments

- Storing Credit Cards for recurring fees, can be done through the back office or by the member in the Info Hub
- Important if the rep does not have a NRDS ID – when processing through NAR Ecommerce, the default NRDS ID set for the gateway will be used
- WIKI: [Store Credit Cards](#)

### Add Payment Profile ✕

Associate With  
Adam Dalton

Do you have a NRDS Member Id  
 Yes  No

Contribution Type  
 Personal  Corporate

Card Number  Month  Year

Name on Card

Address Line 1

Address Line 2

City  State  Postal Code

# Managing Membership Dues Payments

Profile Name	Type
<a href="#">Visa:*****5823-01/2023</a>	NAR Payments
<a href="#">Visa:*****9058-01/2023</a>	NAR Payments

### Add Payment Profile

Payment Profile Type  
NAR Payments

Payment Gateway  
-- Select a Payment Gateway --

**Card Information**

Do you have an NRDS Member Id  Yes  No

NRDS Member ID  
151560950

Contribution Type  
 Personal  Corporate

Card Number  
Month: 6 Year: 2020

Name on Card

Address Line 1

Address Line 2

City State Postal Code

Cancel Done

# Managing Membership Dues

Description	Membership	Bill Contact	Frequency	Amount	Discount	Payment Profile	Start Date	Next Bill Date	End Date
<a href="#">National Dues</a>	Realtor		Annually	\$150.00	\$0.00	Visa:*****4242-3/2024	1/22/2020	1/22/2024	
<a href="#">State Dues</a>	Realtor		Annually	\$100.00	\$0.00	Visa:*****4242-3/2024	1/22/2020	1/22/2024	
<a href="#">Realtor Association Dues</a>	Realtor		Annually	\$75.00	\$0.00	Visa:*****4242-3/2024	1/22/2020	1/22/2024	

### Edit Recurring Billing Item

Time saver tip! When Billing Contact info is updated, the Membership Billing Contact and related recurring billings will also be updated for you when applicable.

Customer:  Billing Contact:  Billing Address:  Billing Email:

Item	Description	Qty	Price	Per Bill Amount	Membership	Campaign
<input type="text" value="National Dues"/>	<input type="text" value="National Dues"/>	<input type="text" value="1"/>	<input type="text" value="150"/>	<input type="text" value="\$150.00"/>	Realtor 1/22/2020	

**Date Settings**

Billing Frequency:  Start Date:  End Date:  Next Bill Date:

**Discounts**


Discount	Discount Description	Start Date	End Date	Amt	%
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**Invoice Settings**


Print Invoice:  Email Invoice:  Term:  Payment Profile:

# Recurring Billing

Upcoming billing will look to a members recurring fee schedule, and prompt you to create invoices

Scheduled Billing 									
Description	Membership	Bill Contact	Frequency	Amount	Discount	Payment Profile	Start Date	Next Bill Date	End Date
<a href="#">National Dues</a>	Realtor		Annually	\$150.00	\$0.00		1/22/2020	1/22/2021	
<a href="#">State Dues</a>	Realtor		Annually	\$100.00	\$0.00		1/22/2020	1/22/2021	
<a href="#">Realtor Association Dues</a>	Realtor		Annually	\$75.00	\$0.00		1/22/2020	1/22/2021	

Stored Payment Profiles 	
Profile Name	Type
None to display	

# NAR Ecommerce – Recurring Billing

WIKI: [Run Upcoming Billing](#)

IMPORTANT: When invoices are generated for members who have stored payment profiles, and have agreed to automatic charges, the day invoices are generated for upcoming billing, the stored payment profile will be charged.

Customer	Next Bill Date	Bill Contact	Description	Frequency	Bundled	Amount	Payment Profile
Lalapalooza	7/16/2020	Marcy Lanson	<a href="#">Default Membership</a>	Annually	No	\$1,200.00	
Kitty's Corner	7/16/2020	Kitty Clarin	<a href="#">Default Membership</a>	Annually	No	\$1,200.00	
Mason's Ski Shop	7/16/2020	Jessica Mason	<a href="#">Default Membership</a>	Annually	No	\$1,200.00	
Jimbo's Farm	7/16/2020		<a href="#">Default Membership</a>	Annually	No	\$1,200.00	
Steve's Bookshop	7/16/2020		<a href="#">Default Membership</a>	Annually	No	\$1,200.00	
Tami's Yarn Shop	7/16/2020	Sarah Pieps	<a href="#">Default Membership</a>	Annually	No	\$1,200.00	

# NAR Ecommerce – Overdue Invoices

You can review over-due invoices on the Sales/Invoices tab

WIKI: [Review Invoices](#)

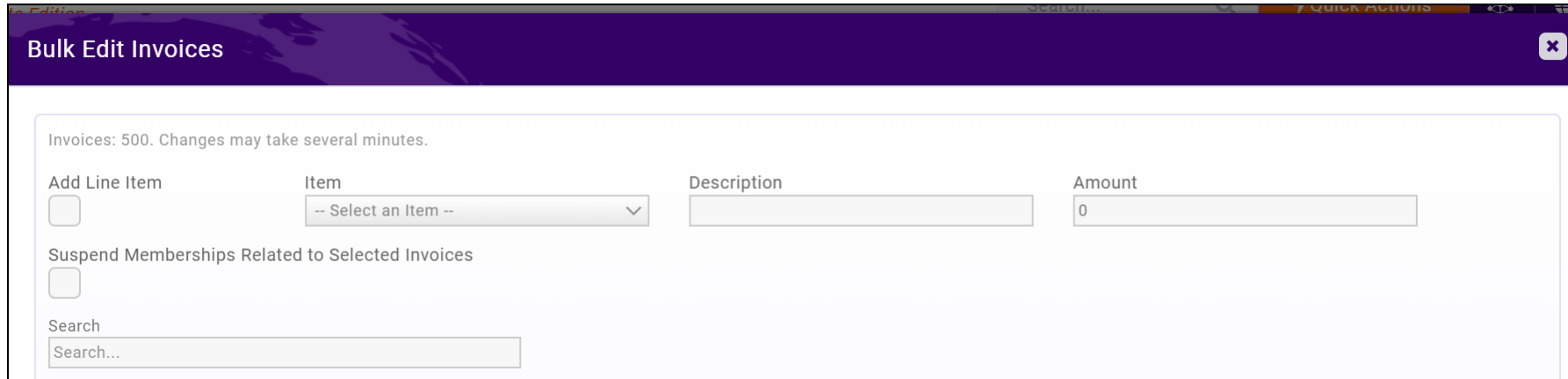
Overview	Pending Delivery	Payments	Sales/Invoices	Upcoming Billing	Deposits	Credit Memos	Accounting Summary		
<input type="text" value="Search..."/>	<input type="text" value="Show only..."/>	<input type="text" value="Customize Results..."/>			<input type="button" value="+ Add Billing"/>	<input type="button" value="Run Upcoming Billing"/>			
Customer	Next Bill Date	Bill Contact	Description	Frequency	Bundled	Amount	Payment Profile		
Lalapalooza	7/16/2020	Marcy Lanson	<a href="#">Default Membership</a>	Annually	No	\$1,200.00			
Kitty's Corner	7/16/2020	Kitty Clarin	<a href="#">Default Membership</a>	Annually	No	\$1,200.00			
Mason's Ski Shop	7/16/2020	Jessica Mason	<a href="#">Default Membership</a>	Annually	No	\$1,200.00			
Jimbo's Farm	7/16/2020		<a href="#">Default Membership</a>	Annually	No	\$1,200.00			
Steve's Bookshop	7/16/2020		<a href="#">Default Membership</a>	Annually	No	\$1,200.00			
Tami's Yarn Shop	7/16/2020	Sarah Pieps	<a href="#">Default Membership</a>	Annually	No	\$1,200.00			



# (Beta – Coming Soon)

A future feature will allow you to identify over-due members and:

- Add a fee to overdue invoices, such as a late fee
- Mass suspend members



The screenshot shows a web interface titled "Bulk Edit Invoices" with a close button (X) in the top right corner. Below the title bar, there is a message: "Invoices: 500. Changes may take several minutes." The main content area contains three columns: "Add Line Item", "Item", "Description", and "Amount". The "Add Line Item" column has a checkbox. The "Item" column has a dropdown menu with "-- Select an Item --". The "Description" column has a text input field. The "Amount" column has a text input field with the value "0". Below these columns, there is a section titled "Suspend Memberships Related to Selected Invoices" with a checkbox. At the bottom, there is a "Search" section with a text input field containing "Search..."

## Create Refunds

- **IMPORTANT:** GrowthZone supports creating refunds for memberships that include splits. However, the refund will auto-debit **ALL** of the refunded amount from the local association
- This is because NAR does not support auto-debiting other associations; it will be up to the local association to contact the others (e.g. State and Nat'l) to recoup those funds. Questions/Concerns should be directed to NAR
- WIKI: [Refunds](#)

## **IMPORTANT:**

The Payment Processing Report will provide you with the grand totals of your payments processed through NAR Ecommerce. You will need to use the statement received from NAR Ecommerce to find the fees for those charges, and update your accounting software appropriately.

WIKI: [Payment Processing Report](#).

# NAR Ecommerce - Reporting

The **Payment Processing Report** can be used to view payments over a selected date range.

Contact Name	Txn ID	Invoices	Payment Check Number	Card Type	Card Number	Charged Amount	Amount	Charged Fees	Fees	Net Amount	Amount Refunded	Dispute Date	Dispute Status	Created On	Last Refunded On	Authorized	Charged	Failure Reason	Payment Gateway
Amu Sach				Visa	0629	\$0.00	\$5.00	\$0.00	\$0.00	\$0.00	\$0.00			1/15/2020		False	False	Your Credit Card has expired.	NAR Ecommerce
Sam John				Mastercard	9342	\$0.00	\$766.00	\$0.00	\$0.00	\$0.00	\$0.00			6/12/2020		False	False	Your Credit Card has expired.	NAR Ecommerce
Bach Sammire				American Express	1025	\$0.00	\$746.67	\$0.00	\$0.00	\$0.00	\$0.00			5/13/2020		False	False	You are not a member in Active, Provisional or Suspended Status.	NAR Ecommerce

Questions?

