

# GrowthZone

## Setting up Prorated Membership Dues



# Overview

If a member decides to join your association in the middle of the year, the membership dues can be prorated so that the member pays only for a portion of the year

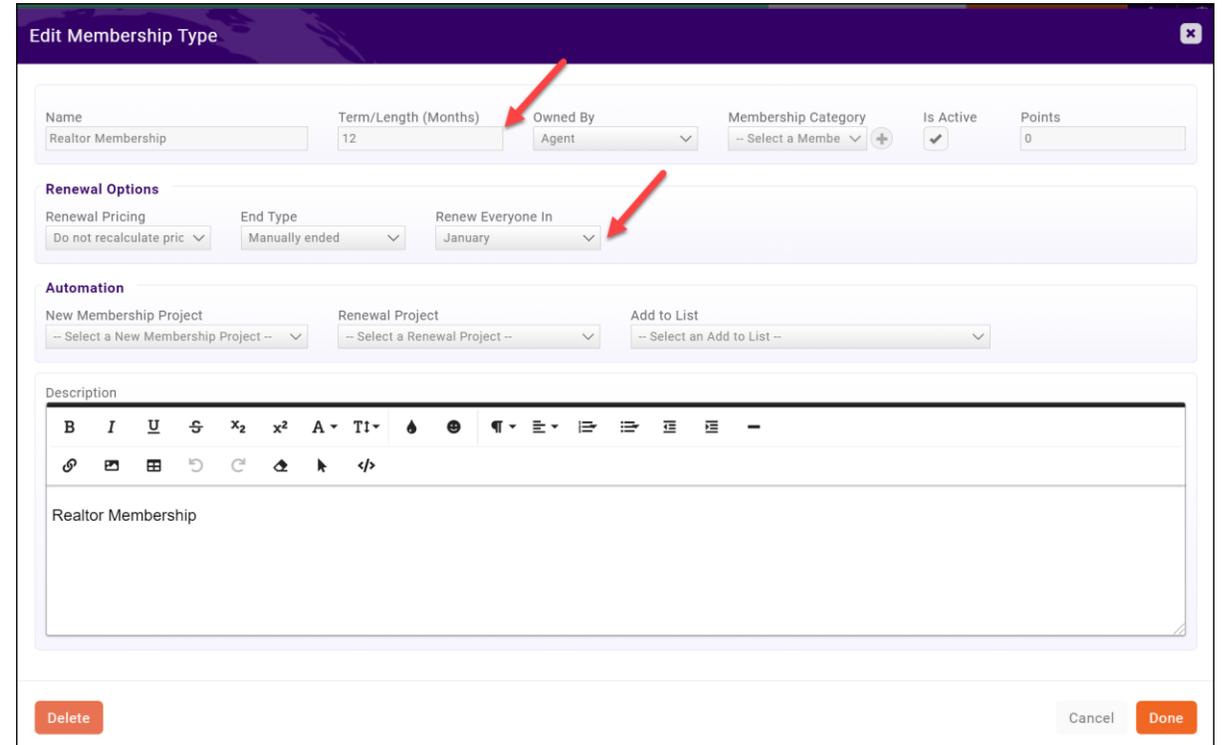
Using your GrowthZone software, you will be able to easily setup proration, even proration at the line item level

*NAR membership is an annual membership from January 1<sup>st</sup> – December 31<sup>st</sup>. National dues are pro-rated monthly for new members based on the join date. This proration only applies in the calendar year the member joins NAR. Thereafter, full year dues are due and owing by January 1*

# Membership Type Setup

Initial proration is setup at the membership type level:

- Membership should be a 12 month term
- Membership should be set to renew everyone in a particular month (For Example: January)
- WIKI: [Add Membership Type](#)



# Proration Options are Set on Pricing

- ✓ Ensure that **Prorate Partial Years** is selected
- ✓ Assign Overall Proration options in the **Payment Options** section
- ✓ For each billing frequency you allow, you will define the proration interval

WIKI: [Set Overall Membership Proration](#)

**Payment Options**

Round the Per Bill Amount

Allow	Frequency	Proration Interval	Allow Invoicing	Allow Credit Cards	Per Bill Amount	Price Change %
<input checked="" type="checkbox"/>	Monthly	No Proration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$47.08	0
<input checked="" type="checkbox"/>	Quarterly	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$141.25	0
<input checked="" type="checkbox"/>	Semiannually	Quarterly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$282.50	0
<input checked="" type="checkbox"/>	Annually	Semiannually	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$565.00	0

**Semi-Annually:** Proration will be performed based on which half of the year a member joins.

For example, given annual dues = \$1200

- A member joins in February, full membership dues would be charged (\$1200)
- A member joins in October, half of the membership dues would be charged (\$600)

**Quarterly:** Proration will be performed based on which quarter of the year a member joins.

For example, given annual dues = \$1200:

- If a member joins in February (first quarter), full membership dues would be charged (\$1200)
- If a member joins in October (last quarter),  $1/4^{\text{th}}$  of the membership dues would be charged (\$300).

# Proration Intervals

**Monthly:** Proration will be performed based on which month of the year a member joins.

For example: Given membership dues are \$1200.00 annually

- If a member joins in February, the member would be charged for 11 months. \$1100.00
- If a member joins in October, the member would be charged for 3 months. \$300.00

# Partial Month (Using Prorate Cutoff Day)

**Partial Month (Using Prorate Cutoff Day):** Under your membership settings, you can determine the cutoff date for billing new members within the month.

For example, given your cut off day is 15:

- New members joins on January 4, the member will be charged for the full month
- New Member joins on January 20<sup>th</sup>, the member will not be charged for that month

# Global Proration Example

Given:

- NAR Dues are \$60 prorated monthly (monthly amount = \$5.00)
- State Dues are \$30 prorated monthly (monthly amount = \$2.50)
- Local Dues are \$60 prorated monthly (monthly amount = \$2.50)

# Proration at the line item level

Once overall proration options are set, you can set proration at the line item level by clicking the billing options for an individual line item

WIKI: [Over-ride Global Membership Proration](#)

For example, perhaps

- NAR Dues are \$60 prorated monthly (monthly amount = \$5.00)
- State Dues are \$30 prorated monthly (monthly amount = \$2.50)
- Local Dues are \$60 not prorated

Questions?

