

GrowthZone Managing Unpaid Billing



Agenda

Automating NRDS, LockBox and MLS Status Updates

Adding Late Fees

Adding Reactivation Fees

Suspending Members

Mass Drop

Sooner or later, your association is going to have a member who can't or won't pay their dues 😞

While your processes may vary, your GrowthZone software provides several functions to assist you in managing unpaid invoices



1. View/Resend Invoices
2. View Unpaid Invoices
3. Add Late Fees
4. View Unpaid Invoices
5. Add Reactivation Fee/Suspend Member
6. View Unpaid Invoices
7. Drop Members

Do you wish to automatically update NRDS, MLS, Lockbox status when a member is suspended/dropped?

Newly introduced **Real Estate Settings** allow you to automate the process of updating the NRDS, MLS, Lockbox status when members are suspended

Settings Real Estate Settings

Real Estate Membership Integration Settings Add

Membership Name	Suspend	Reactivate	Drop	Days Overdue to Allow Reactivation	Actions
Realtor Membership	MLS: S Lock Box: Suspended Lock Box Card: Terminated NRDS: Inactive	MLS: A Lock Box: Valid Lock Box Card: Active NRDS: Active	MLS: I Lock Box: Terminated Lock Box Card: Terminated NRDS: Inactive	0	 

Membership Integration Settings

Membership Type
-- Select a Membership Type --

Suspend

MLS
-- No Change --

Lock Box
-- No Change --

NRDS
-- No Change --

Do you wish to automatically update NRDS, MLS, Lockbox status when a member is suspended/dropped?

WIKI: [Link NRDS, MLS, LockBox status to Membership Status](#)

Membership Integration Settings ✕

Membership Type
-- Select a Membership Type --

Suspend

MLS
-- No Change --

Lock Box
-- No Change --

NRDS
-- No Change --

Automatically update NRDS, MLS, Lockbox status when a member is suspended/dropped?

Days Overdue to Allow Reactivation

- ✓ If you do not wish to automate the processes to update NRDS, MLS, Lockbox status, you may still want to configure “Days Overdue to Allow Reactivation”
- ✓ This setting allows you to automate the process of reactivating suspended members
- ✓ This setting is especially important if you are billing monthly

Days Overdue to Allow Reactivation

How it works:

- You suspend a member for an unpaid invoice
- When they pay the invoice, the system will look for any other open invoices
- If there are no additional open invoices, the member will be reactivated
- If there are additional open invoices, the system will look at the aging of those invoices
 - If aging is less than Days Overdue to Allow Reactivation, the system will reactivate the member
 - If aging is greater than Days Overdue to Allow Reactivate, the system will NOT reactivate the member

Resend Overdue Invoices

Dependent on your processes, you may wish to resend invoices with a gentle reminder

Your GrowthZone software allows you to easily identify over-due invoices, and the ability to resend them

WIKI: [View/Resend Overdue Invoices](#)

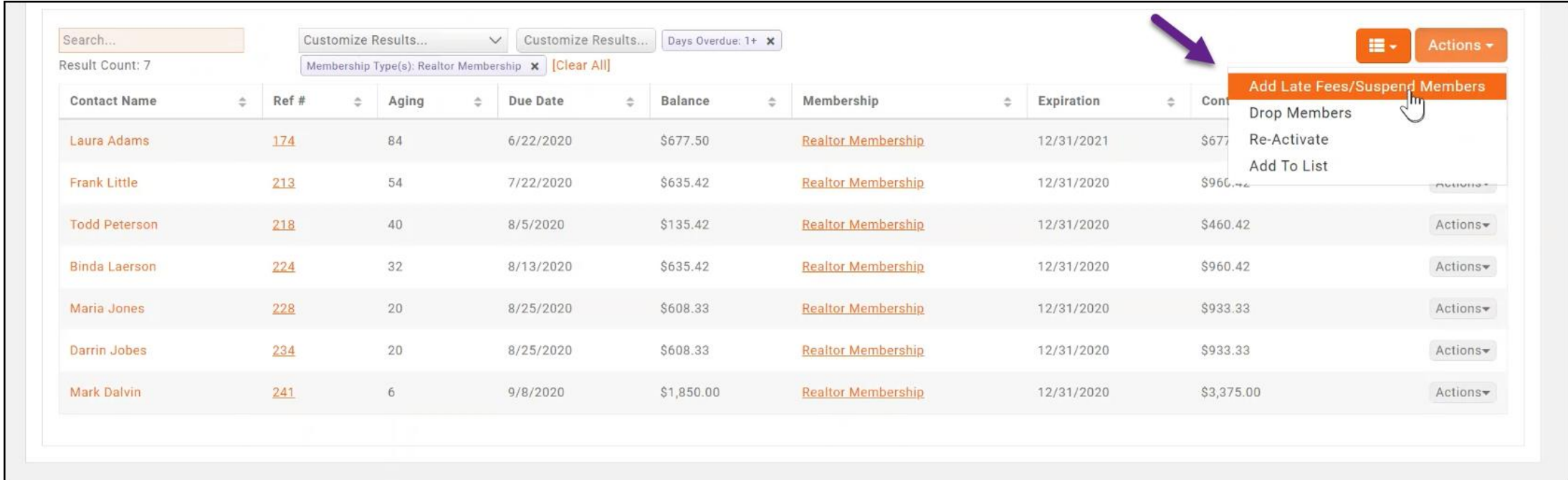
Add Late Fees to Unpaid Invoices

If you choose to add late fees:

- ✓ A goods/service of type “Late Fee” must be setup
- ✓ Only the following recognition types are allowed:
 - Cash basis
 - Fully on Paid Date
 - Fully on Invoice Date
- ✓ When added to an invoice, late fee saleable items have a transaction date of the current date, so as to not impact previously closed accounting periods

Add Late Fees to Unpaid Invoices

- ✓ When added to an invoice, the late fee will have a transaction date of the current date, so as to not impact previously closed accounting periods



Search... Customize Results... Customize Results... Days Overdue: 1+ x

Result Count: 7 Membership Type(s): Realtor Membership x [Clear All]

Contact Name	Ref #	Aging	Due Date	Balance	Membership	Expiration	Cont	Actions
Laura Adams	174	84	6/22/2020	\$677.50	Realtor Membership	12/31/2021	\$677.50	Add Late Fees/Suspend Members Drop Members Re-Activate Add To List
Frank Little	213	54	7/22/2020	\$635.42	Realtor Membership	12/31/2020	\$960.42	Actions
Todd Peterson	218	40	8/5/2020	\$135.42	Realtor Membership	12/31/2020	\$460.42	Actions
Binda Laerson	224	32	8/13/2020	\$635.42	Realtor Membership	12/31/2020	\$960.42	Actions
Maria Jones	228	20	8/25/2020	\$608.33	Realtor Membership	12/31/2020	\$933.33	Actions
Darrin Jobes	234	20	8/25/2020	\$608.33	Realtor Membership	12/31/2020	\$933.33	Actions
Mark Dalvin	241	6	9/8/2020	\$1,850.00	Realtor Membership	12/31/2020	\$3,375.00	Actions

Add Late Fees to Unpaid Invoices

WIKI: [Add Late Fees to Overdue Invoices](#)

Add Late Fees/Suspend Members

7 Invoices and 7 Memberships will be affected.

Add Line Item	Item	Description	Amount
<input type="checkbox"/>	Membership Dues Late Fee	Membership Dues Late Fee	15

Suspend Memberships Related to Selected Invoices

Edit Invoice

2 of 7

Invoice Number: 213 | Invoice Date: 7/22/2020 | Term: Due on Receipt | Due Date: 7/22/2020 | PO #:

Customer: Frank Little | Contact: -- Select a Contact -- | Address: -- Select an Address -- | Email: -- Select an Email --

Message: | Internal Memo:

Mark to Print: | Mark to Email: | Balance: \$650.42

Item	Description	Qty	Price	Hide	Tax	Shipping	Disc	Total
Membership Setup	Membership Setup	1	500	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$500.00
Membership Dues Late Fee	Membership Dues Late Fee	1	15	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$15.00
Local Association Dues	Realtor Association Dues	1	31.25	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$31.25
National Dues	National Dues	1	62.5	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$62.50
State Dues	State Dues	1	41.67	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$41.67
								\$650.42

Add Reactivation Fees to Unpaid Invoices

If plan to suspend a member, and a reactivation fee must be paid prior to reactivated the member:

- ✓ A goods/service of type must be setup (or type: Late Fee)
- ✓ Only the following recognition types are allowed:
 - Cash basis
 - Fully on Paid Date
 - Fully on Invoice Date
- ✓ When added to an invoice, the saleable item will have a transaction date of the current date, so as to not impact previously closed accounting periods

Add Reactivation Fees to Unpaid Invoices

WIKI: [Add Reactivation Fee to Unpaid Invoice](#)

Edit Invoice < 1 of 26 > ✕

Invoice Number: 218 Invoice Date: 8/5/2020 Term: Due on Receipt Due Date: 8/5/2020 PO #:

Customer: Todd Peterson Contact: -- Select a Contact -- Address: -- Select an Address -- Email: -- Select an Email --

Message: Internal Memo:

Mark to Print: Mark to Email: Balance: \$500.42

Item	Description	Qty	Price	Hide	Tax	Shipping	Disc	Total	
Membership Dues Late Fee	Membership Dues Late Fee	1	15	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$15.00	+ ✕
Membership Reactivation Fee	Membership Reactivation Fe	1	250	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$250.00	✕
Local Association Dues	Realtor Association Dues	1	31.25	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$31.25	✕
National Dues	National Dues	1	62.5	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$62.50	✕
State Dues	State Dues	1	41.67	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$41.67	✕
								\$400.42	

Payment History

Type	Reference Number	Created By	Transaction Date	Amount	Actions
None to display					

Suspend/Drop Members with Unpaid Invoices

You may wish to suspend members when their membership invoice is unpaid

Considerations...

- ✓ Do you wish to automatically update NRDS, MLS, Lockbox status when a member is suspended/dropped?
- ✓ Do you wish the member to automatically be reactivate a suspended member when the invoice is paid?

Suspend Members

Suspending members is a manual process. You will be able to suspend individually or in bulk

WIKI: [Suspend Overdue Members](#)

Add Late Fees/Suspend Members ✕

7 Invoices and 7 Memberships will be affected.

Add Line Item	Item	Description	Amount
<input type="checkbox"/>	-- Select an Item --		0

Suspend Memberships Related to Selected Invoices

Cancel Apply Changes

Reactivate Members

Reactivating members can be done automatically, based on your Real Estate Settings, or you can manually reactivate the members

WIKI: [Reactivate Suspended Members](#)

Add Late Fees/Suspend Members ✕

7 Invoices and 7 Memberships will be affected.

Add Line Item	Item	Description	Amount
<input type="checkbox"/>	-- Select an Item --		0

Suspend Memberships Related to Selected Invoices

Cancel Apply Changes

Mass Drop Members

Unfortunately, there will be times that you simply need to drop a member for non-payment. This can be done manually or in bulk

WIKI: [Mass Drop Members](#)

Drop Members ✕

7 Invoices and 7 Memberships will be affected.

Reason
-- Select a Reason -- ▼ +

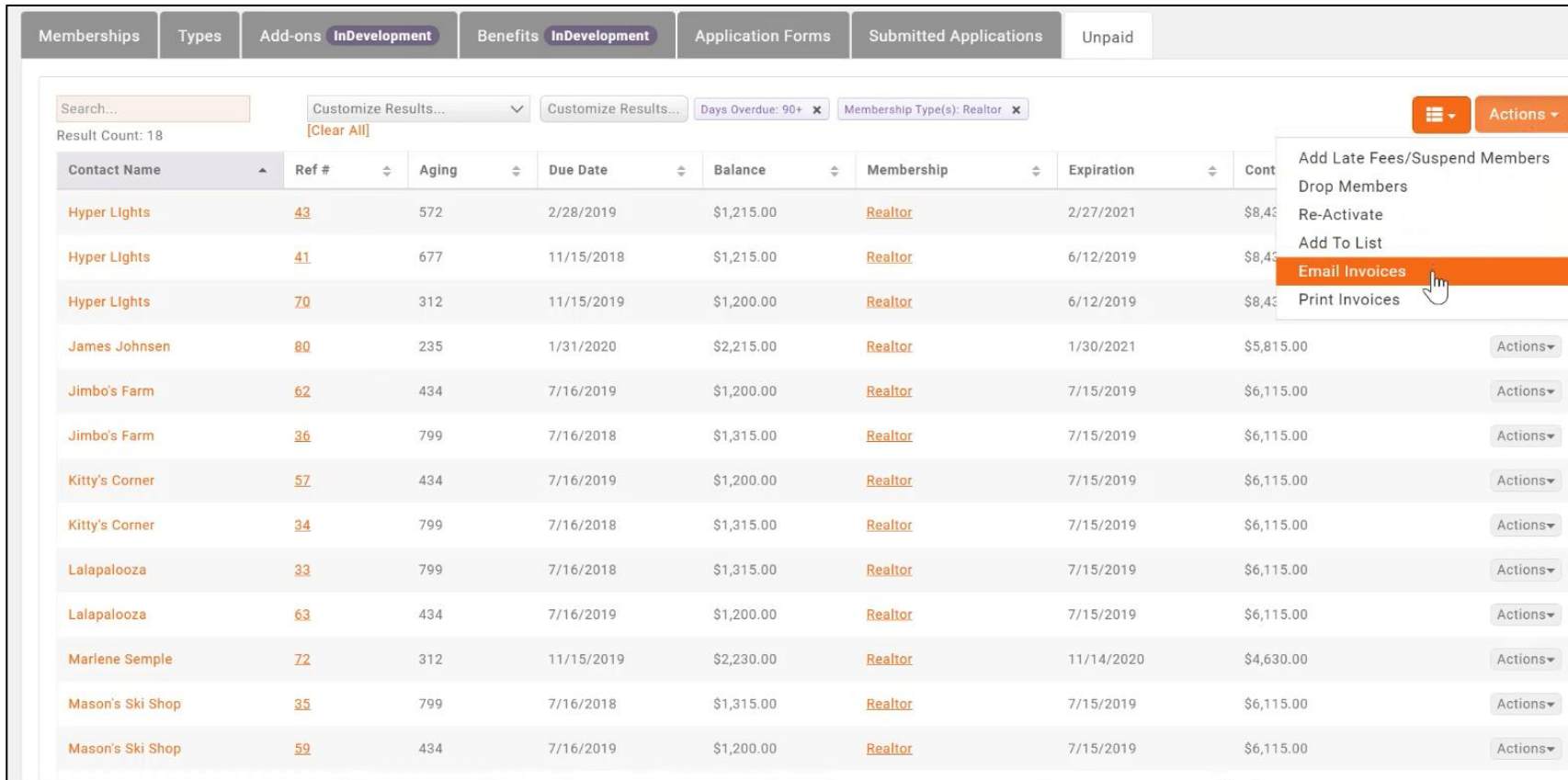
Once dropped these members will:

- Be removed from all lists/committees
- Have all invoices related to the dropped membership written off
- Have all directory listings related to dropped membership removed
- Lose access to MLS, lockbox, and/or NRDS based on the settings in Membership Settings

Cancel Apply Changes

Coming Soon!

Coming soon, to add efficiencies, you will be able to email and print invoices from the unpaid invoices tab...



Memberships | Types | Add-ons **InDevelopment** | Benefits **InDevelopment** | Application Forms | Submitted Applications | Unpaid

Search... Customize Results... [Clear All] Days Overdue: 90+ x Membership Type(s): Realtor x Actions

Result Count: 18

Contact Name	Ref #	Aging	Due Date	Balance	Membership	Expiration	Contact
Hyper Lights	43	572	2/28/2019	\$1,215.00	Realtor	2/27/2021	\$8,430.00
Hyper Lights	41	677	11/15/2018	\$1,215.00	Realtor	6/12/2019	\$8,430.00
Hyper Lights	70	312	11/15/2019	\$1,200.00	Realtor	6/12/2019	\$8,430.00
James Johnsen	80	235	1/31/2020	\$2,215.00	Realtor	1/30/2021	\$5,815.00
Jimbo's Farm	62	434	7/16/2019	\$1,200.00	Realtor	7/15/2019	\$6,115.00
Jimbo's Farm	36	799	7/16/2018	\$1,315.00	Realtor	7/15/2019	\$6,115.00
Kitty's Corner	57	434	7/16/2019	\$1,200.00	Realtor	7/15/2019	\$6,115.00
Kitty's Corner	34	799	7/16/2018	\$1,315.00	Realtor	7/15/2019	\$6,115.00
Lalapalooza	33	799	7/16/2018	\$1,315.00	Realtor	7/15/2019	\$6,115.00
Lalapalooza	63	434	7/16/2019	\$1,200.00	Realtor	7/15/2019	\$6,115.00
Marlene Semple	72	312	11/15/2019	\$2,230.00	Realtor	11/14/2020	\$4,630.00
Mason's Ski Shop	35	799	7/16/2018	\$1,315.00	Realtor	7/15/2019	\$6,115.00
Mason's Ski Shop	59	434	7/16/2019	\$1,200.00	Realtor	7/15/2019	\$6,115.00

Actions

- Add Late Fees/Suspend Members
- Drop Members
- Re-Activate
- Add To List
- Email Invoices**
- Print Invoices

Questions?

