

Managing Membership Dues Billing



Agenda

- Understanding Recurring Billing
- Best Practices
- Run Upcoming Billing
- Deliver Invoices



Understanding Recurring Billing

To make it efficient and easy for you to generate your invoices for recurring billing, your GrowthZone software track:

- Which members need to be billed
- What membership(s) they should be billed for
- How much they should be billed
- When they should be billed

Understanding Recurring Billing

Who needs to be billed...


- GrowthZone relies on the Recurring Fee schedule on a members Billing tab to identify who needs to be billed
- All members who must be billed for membership dues should have a scheduled billing, which is automatically generated when a membership is added to a contact

| Scheduled Billing | | | | | | | | | |
|---------------------------------------|------------|--------------|-----------|----------|----------|-----------------|------------|----------------|----------|
| Description | Membership | Bill Contact | Frequency | Amount | Discount | Payment Profile | Start Date | Next Bill Date | End Date |
| National Dues | Realtor | | Annually | \$116.00 | \$0.00 | | 1/21/2021 | 1/21/2022 | |
| State Membership Dues | Realtor | | Annually | \$75.00 | \$0.00 | | 1/21/2021 | 1/21/2022 | |
| Association Dues | Realtor | | Annually | \$50.00 | \$0.00 | | 1/21/2021 | 1/21/2022 | |

Understanding Recurring Billing

What memberships they need to be billed for...


- The memberships assigned to a member are added on the member's profile tab, then any recurring fees for those memberships will be scheduled on the Member's Billing Tab

| Scheduled Billing  | | | | | | | | | |
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Understanding Recurring Billing


How much they should be billed...

- The system relies on the information defined by the membership type setup, and scheduled on the members Billing tab, to determine how much a member should be billed


| Scheduled Billing  | | | | | | | | | |
|---|------------|--------------|-----------|----------|----------|-----------------|------------|----------------|----------|
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When should they be billed...

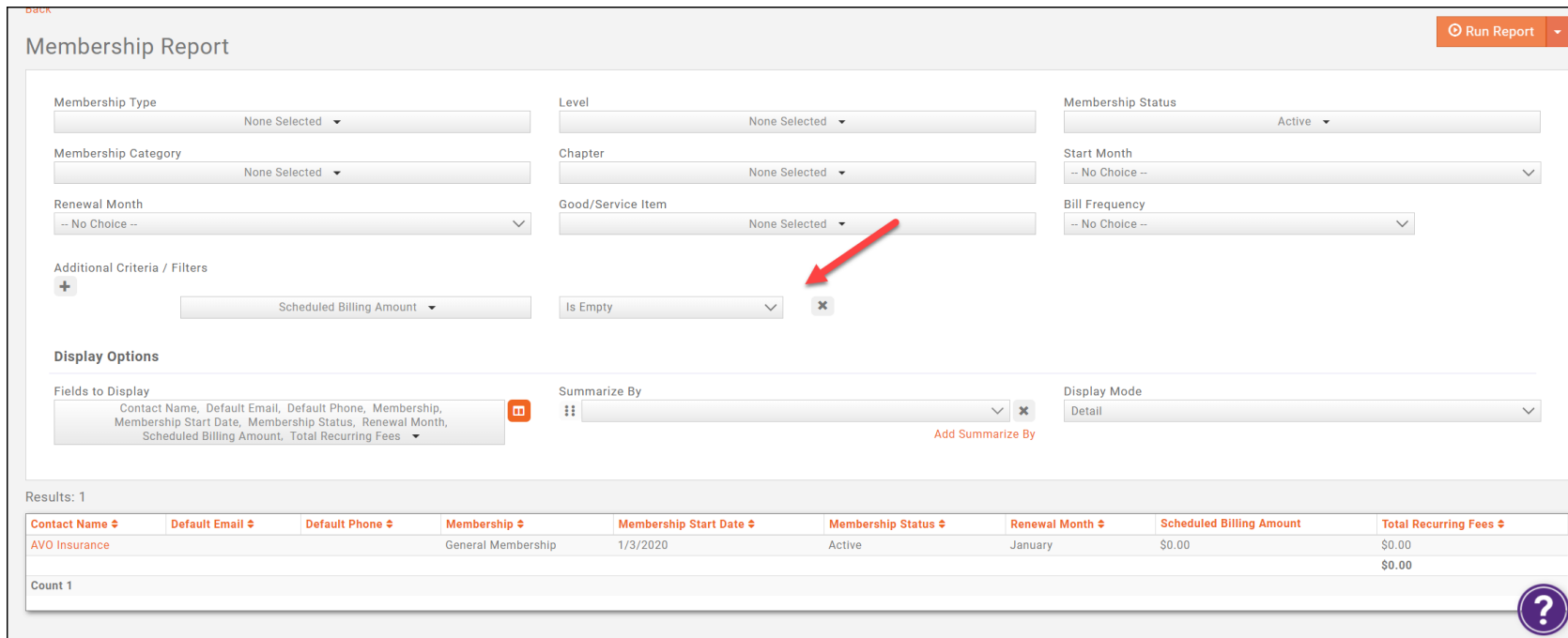
- When a membership is first added to a contact, the system will look at the membership term and frequency at which a member wishes to be billed to determine a “Next Bill Date”
- For Example: A member joins on 1/1/2021. The membership term is 12 months and the billing frequency is annual. After the initial membership invoice is generated, the system will setup the Scheduled Billing with a next bill date of 1/1/2022

| Scheduled Billing  | | | | | | | | | |
|--|------------|--------------|-----------|----------|----------|-----------------|------------|----------------|----------|
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- **When adding a membership, validate that the next bill date and fee schedule is correct!**
 - When adding the membership, you will see the next bill date as the current date – this is correct until you save the membership and an invoice is generated for the new membership.
 - Once this invoice has been generated, you will see on the member’s Billing tab, the actual next bill date which is derived from the term of the membership and the billing frequency

| Scheduled Billing  | | | | | | | | | |
|---|------------|--------------|-----------|----------|----------|-----------------|------------|----------------|----------|
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- **Ensure all of your active members have a recurring fee schedule!**
 - Use the **Membership Report**, and include an additional filter “**Scheduled Billing Amount IsEmpty**”
 - If a member does not have a schedule, use the Upgrade/Downgrade function to assign a fee schedule



Membership Report

Membership Type: None Selected

Level: None Selected

Membership Status: Active

Membership Category: None Selected

Chapter: None Selected

Start Month: -- No Choice --

Renewal Month: -- No Choice --

Good/Service Item: None Selected

Bill Frequency: -- No Choice --

Additional Criteria / Filters

Scheduled Billing Amount: Is Empty

Display Options

Fields to Display: Contact Name, Default Email, Default Phone, Membership, Membership Start Date, Membership Status, Renewal Month, Scheduled Billing Amount, Total Recurring Fees

Summarize By: Add Summarize By

Display Mode: Detail

Results: 1


| Contact Name | Default Email | Default Phone | Membership | Membership Start Date | Membership Status | Renewal Month | Scheduled Billing Amount | Total Recurring Fees |
|---------------|---------------|---------------|--------------------|-----------------------|-------------------|---------------|--------------------------|----------------------|
| AVO Insurance | | | General Membership | 1/3/2020 | Active | January | \$0.00 | \$0.00 |
| Count 1 | | | | | | | | |

Ensure that you have accurate Billing Contact Information...

- When you assign a membership, you will also assign the billing contact and contact information (If this is not assigned, the contact information of the membership owner will be used)
- The **Membership Report** can be used to check billing contact information, and the IsMissing operator can be used identify any missing information

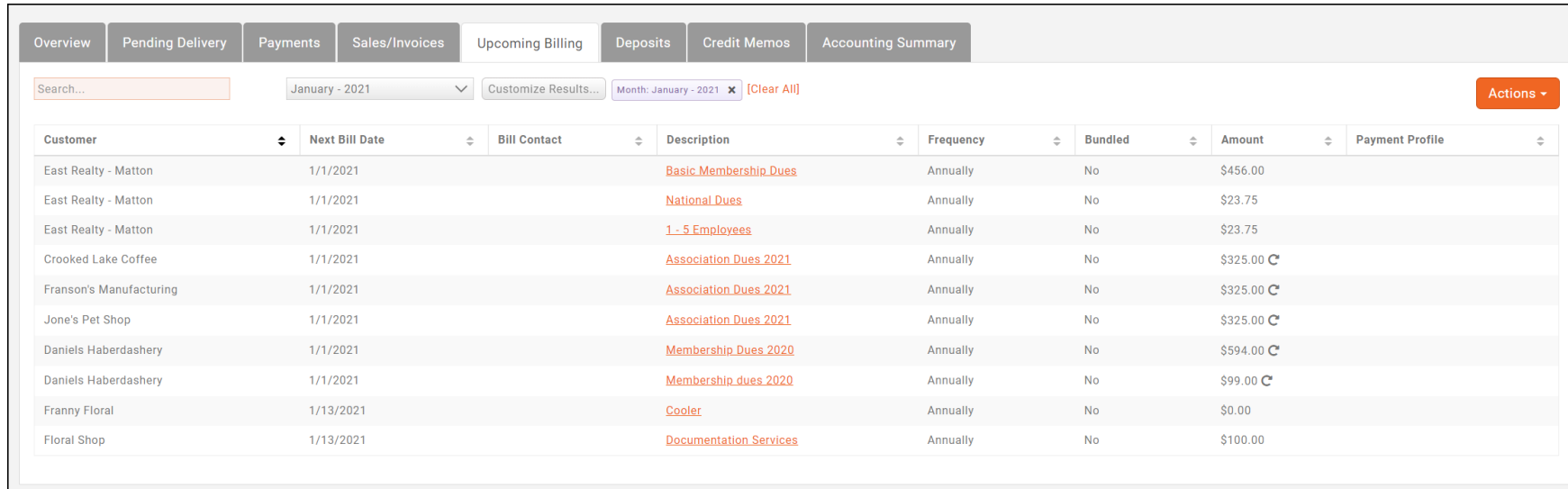
Results: 3

| Contact Name | Next Bill Date | Membership Billing Contact | Membership Billing Contact Email | Scheduled Billing Amount | Membership | Membership Start Date | Membership Status |
|---------------------------|----------------|----------------------------|----------------------------------|--------------------------|---|-----------------------|-------------------|
| Linda Stanford | 6/8/2021 | Linda Stanford | | \$241.00 | Realtor | 6/8/2020 | Active |
| Granson Home Improvements | 6/19/2021 | Laura Gransom | gransom@mailinator.com | \$693.00 | Corporate Package 2020 - 500001 - 75000 | 2/19/2021 | Active |
| Semple's | 6/22/2021 | Semple's | cheri.petterson@growthzone.com | \$1,225.00 | Corporate Membership | 6/22/2020 | Active |
| Count 3 | | | | | | | |



Only generate renewal invoices from the Upcoming Billing tab in the Billing Module!

- If invoices are created as one off for memberships vs. from the Upcoming Billing tab, the system will not recognize that you have generated an invoice for the next bill date and will not advance the next bill date, nor will it recognize a **renewal activation**
- **Membership Activations** are used to track membership renewal, upgrade, downgrade, adjustment and drops activity

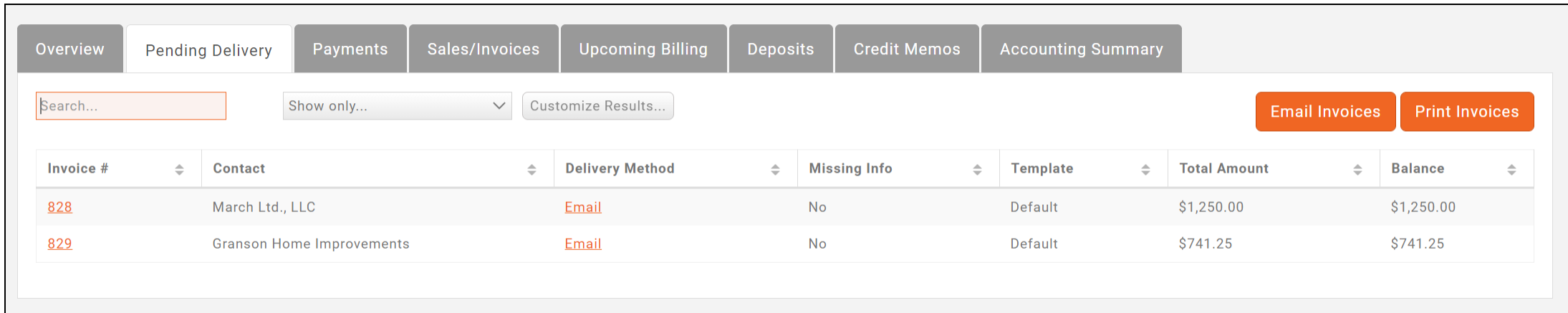


Overview Pending Delivery Payments Sales/Invoices **Upcoming Billing** Deposits Credit Memos Accounting Summary

Search... January - 2021 Customize Results... Month: January - 2021 [Clear All] Actions

| Customer | Next Bill Date | Bill Contact | Description | Frequency | Bundled | Amount | Payment Profile |
|-------------------------|----------------|--------------|------------------------|-----------|---------|----------|-----------------|
| East Realty - Matton | 1/1/2021 | | Basic Membership Dues | Annually | No | \$456.00 | |
| East Realty - Matton | 1/1/2021 | | National Dues | Annually | No | \$23.75 | |
| East Realty - Matton | 1/1/2021 | | 1 - 5 Employees | Annually | No | \$23.75 | |
| Crooked Lake Coffee | 1/1/2021 | | Association Dues 2021 | Annually | No | \$325.00 | |
| Franson's Manufacturing | 1/1/2021 | | Association Dues 2021 | Annually | No | \$325.00 | |
| Jone's Pet Shop | 1/1/2021 | | Association Dues 2021 | Annually | No | \$325.00 | |
| Daniels Haberdashery | 1/1/2021 | | Membership Dues 2020 | Annually | No | \$594.00 | |
| Daniels Haberdashery | 1/1/2021 | | Membership dues 2020 | Annually | No | \$99.00 | |
| Franny Floral | 1/13/2021 | | Cooler | Annually | No | \$0.00 | |
| Floral Shop | 1/13/2021 | | Documentation Services | Annually | No | \$100.00 | |

Prior to running upcoming billing “clear out” the **Pending Delivery** tab by either delivering the invoices or deselecting option to print/email. But how did they get there?

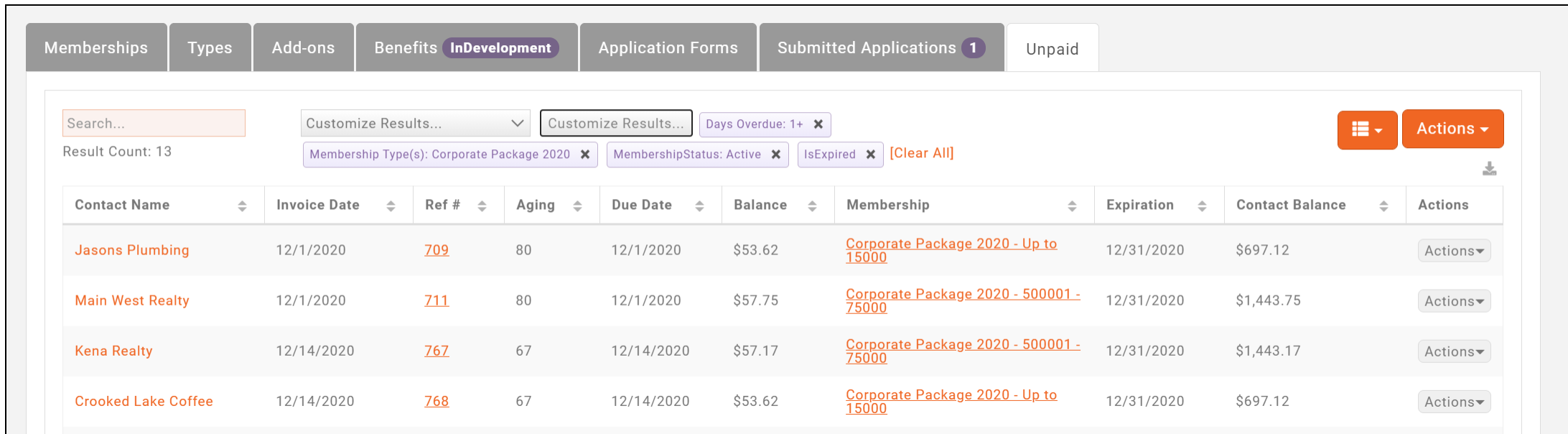


The screenshot shows the 'Pending Delivery' tab in the GrowthZone software interface. At the top, there are navigation tabs: Overview, Pending Delivery (selected), Payments, Sales/Invoices, Upcoming Billing, Deposits, Credit Memos, and Accounting Summary. Below the tabs is a search bar with the text 'Search...', a 'Show only...' dropdown menu, and a 'Customize Results...' button. To the right of the search bar are two orange buttons: 'Email Invoices' and 'Print Invoices'. Below these elements is a table with the following columns: Invoice #, Contact, Delivery Method, Missing Info, Template, Total Amount, and Balance. The table contains two rows of data:

| Invoice # | Contact | Delivery Method | Missing Info | Template | Total Amount | Balance |
|---------------------|---------------------------|-----------------------|--------------|----------|--------------|------------|
| 828 | March Ltd., LLC | Email | No | Default | \$1,250.00 | \$1,250.00 |
| 829 | Granson Home Improvements | Email | No | Default | \$741.25 | \$741.25 |

Review unpaid membership dues

- ✓ If a member has lapsed in paying their previous renewal dues, will you send them yet another renewal invoice?
- ✓ If you have not been checking unpaid dues, we recommend that you do this with the same regularity as you generate renewal invoices as you may wish to process drops prior to creating renewal invoices
- ✓ WIKI: [Manage Unpaid Membership Dues](#)

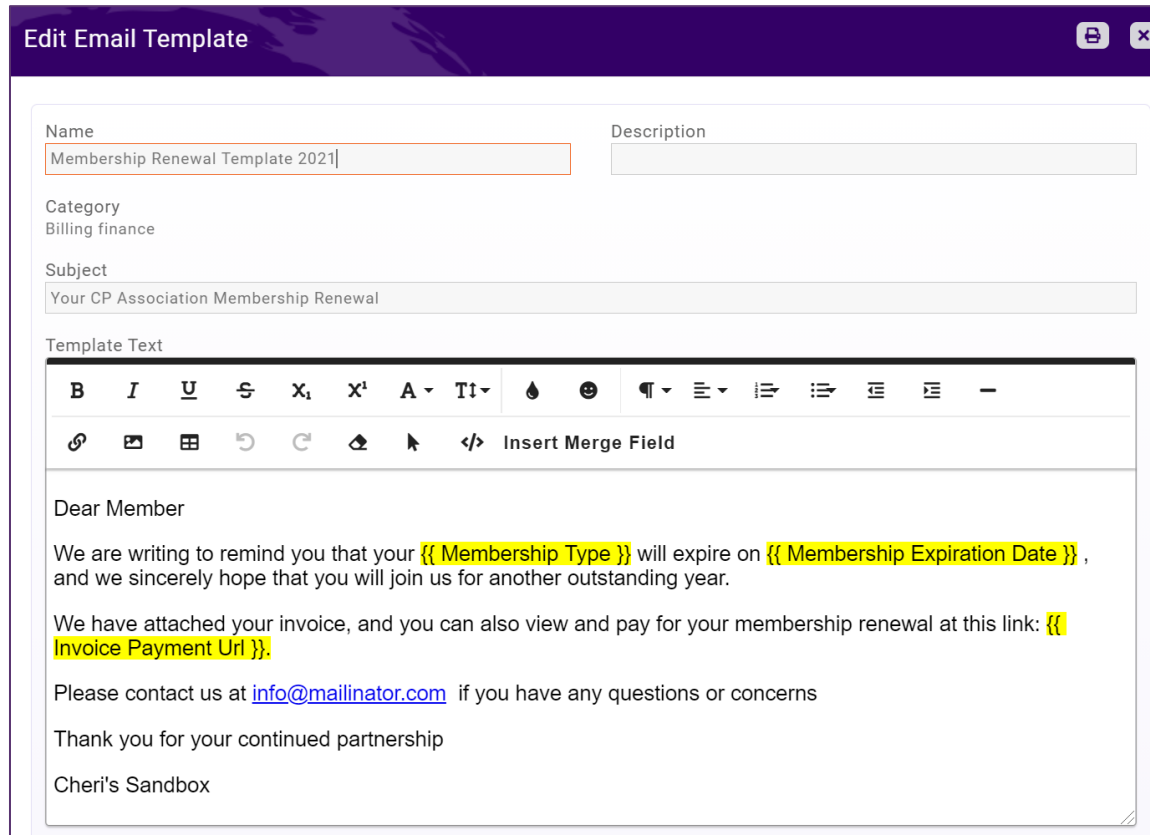


The screenshot displays the 'Unpaid' section of the GrowthZone software. At the top, there are navigation tabs: Memberships, Types, Add-ons, Benefits (InDevelopment), Application Forms, Submitted Applications (1), and Unpaid. Below the tabs is a search bar and a 'Result Count: 13'. There are also filters for 'Membership Type(s): Corporate Package 2020', 'MembershipStatus: Active', and 'IsExpired', along with a 'Days Overdue: 1+' filter and a '[Clear All]' button. A table lists the unpaid dues with columns for Contact Name, Invoice Date, Ref #, Aging, Due Date, Balance, Membership, Expiration, Contact Balance, and Actions. The table contains four rows of data.

| Contact Name | Invoice Date | Ref # | Aging | Due Date | Balance | Membership | Expiration | Contact Balance | Actions |
|---------------------|--------------|---------------------|-------|------------|---------|---|------------|-----------------|---------|
| Jasons Plumbing | 12/1/2020 | 709 | 80 | 12/1/2020 | \$53.62 | Corporate Package 2020 - Up to 15000 | 12/31/2020 | \$697.12 | Actions |
| Main West Realty | 12/1/2020 | 711 | 80 | 12/1/2020 | \$57.75 | Corporate Package 2020 - 500001 - 75000 | 12/31/2020 | \$1,443.75 | Actions |
| Kena Realty | 12/14/2020 | 767 | 67 | 12/14/2020 | \$57.17 | Corporate Package 2020 - 500001 - 75000 | 12/31/2020 | \$1,443.17 | Actions |
| Crooked Lake Coffee | 12/14/2020 | 768 | 67 | 12/14/2020 | \$53.62 | Corporate Package 2020 - Up to 15000 | 12/31/2020 | \$697.12 | Actions |

Are you ready?

- ✓ Have you designed your invoice template?
- ✓ Have you designed the email template you wish to use in sending out your renewals?



The screenshot shows the 'Edit Email Template' interface. The title bar is purple with the text 'Edit Email Template' and window control icons. The form contains the following fields and sections:

- Name:** Membership Renewal Template 2021
- Description:** (empty)
- Category:** Billing finance
- Subject:** Your CP Association Membership Renewal
- Template Text:** A rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, link, unlink, text color, background color, bulleted list, numbered list, indent, and outdent. Below the toolbar is a row of icons for link, image, table, undo, redo, insert merge field, and code. The text area contains:

Dear Member

We are writing to remind you that your **{{ Membership Type }}** will expire on **{{ Membership Expiration Date }}**, and we sincerely hope that you will join us for another outstanding year.

We have attached your invoice, and you can also view and pay for your membership renewal at this link: **{{ Invoice Payment Url }}**.

Please contact us at info@mailinator.com if you have any questions or concerns

Thank you for your continued partnership

Cheri's Sandbox

Run Upcoming Billing

Based on the billing frequencies you have allowed for recurring fees, you may need to run your invoices on a monthly basis

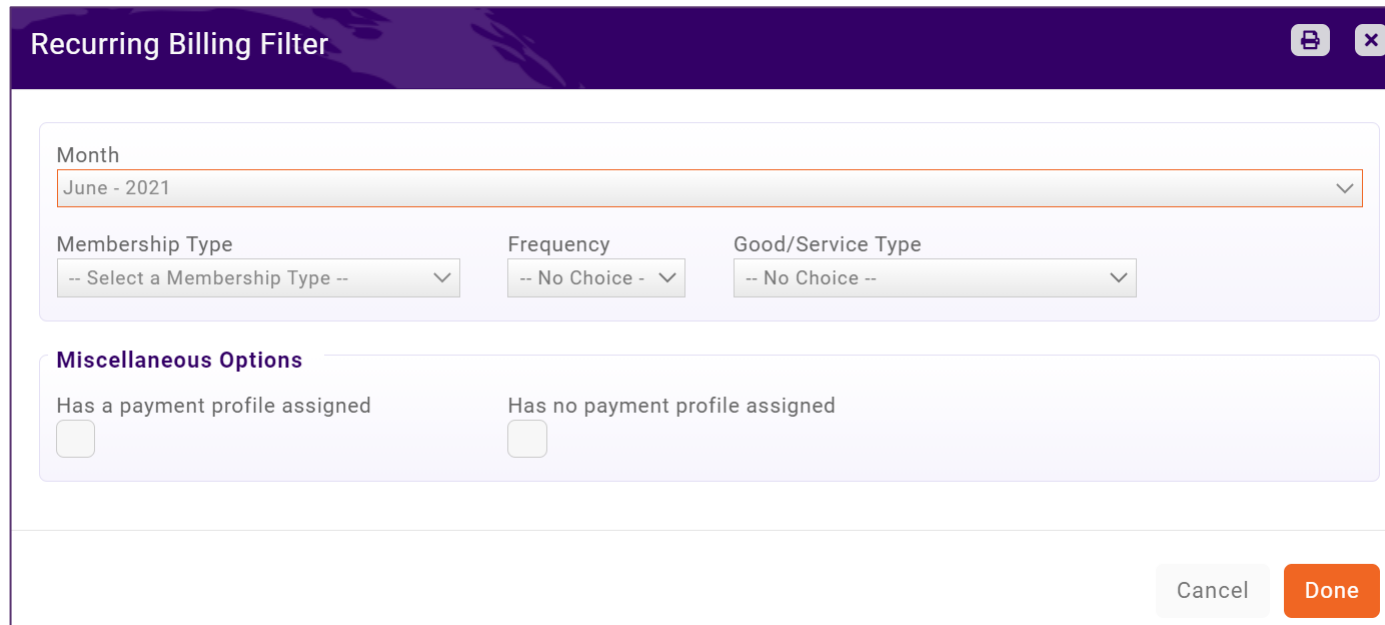
WIKI: [Run Upcoming Billing](#)

| Overview | Pending Delivery | Payments | Sales/Invoices | Upcoming Billing | Deposits | Credit Memos | Accounting Summary |
|---------------------------|------------------|----------------------|---------------------------------------|------------------|----------|--------------|--------------------|
| Search... | June - 2021 | Customize Results... | Month: June - 2021 | [Clear All] | Actions | | |
| Customer | Next Bill Date | Bill Contact | Description | Frequency | Bundled | Amount | Payment Profile |
| Semple's | 6/22/2021 | Semple's | Corporate Membership | Annually | No | \$1,200.00 | C |
| Granson Home Improvements | 6/19/2021 | Laura Gransom | Membership Dues 2020 | Annually | No | \$594.00 | C |
| Linda Stanford | 6/8/2021 | Linda Stanford | National Dues | Annually | No | \$116.00 | C |
| Granson Home Improvements | 6/19/2021 | Laura Gransom | Membership dues 2020 | Annually | No | \$99.00 | C |
| Linda Stanford | 6/8/2021 | Linda Stanford | State Membership Dues | Annually | No | \$75.00 | C |
| Linda Stanford | 6/8/2021 | Linda Stanford | Association Dues | Annually | No | \$50.00 | C |
| Semple's | 6/22/2021 | Semple's | Default Membership | Annually | No | \$25.00 | C |

Run Upcoming Billing

Add filtering options to the list of invoices you wish to generate

IMPORTANT! If you members have stored payment profiles, the day you generate the invoices is the day the profile will be charged. If you are generating invoices ahead of time, you may wish to filter out those with payment profiles and run those at a future date



The screenshot shows a dialog box titled "Recurring Billing Filter" with a close button (x) and a refresh button (B). The dialog contains the following fields:

- Month:** A dropdown menu currently showing "June - 2021".
- Membership Type:** A dropdown menu showing "-- Select a Membership Type --".
- Frequency:** A dropdown menu showing "-- No Choice -".
- Good/Service Type:** A dropdown menu showing "-- No Choice --".

Below these fields is a section titled "Miscellaneous Options" containing two checkboxes:

- Has a payment profile assigned
- Has no payment profile assigned

At the bottom right of the dialog are two buttons: "Cancel" and "Done".

Run Upcoming Billing

Once you have filtered your list to the desired upcoming billing items, review the list as a final check to ensure all looks accurate, once you run upcoming billing invoices will be generated and there is no “undo” button

Run Upcoming Billing

Note
Clicking Run will immediately generate invoices and charge payment profiles. Confirm that the summary information below is correct.

| Invoices to Create | Scheduled Billing Items | Next Bill Date Range | Value of Invoices |
|--------------------|-------------------------|----------------------|-------------------|
| 2 | 2 | 1/1/2021 - 1/1/2021 | \$693.00 |

Cancel Run

Run Upcoming Billing

Click the Run Upcoming Billing button (or, if you have membership dues set to recalculate, click the Actions link and select Run Upcoming Billing). A summary of the number of invoices and number of scheduled items will be displayed providing summary information of the invoices that will be generated

Run Upcoming Billing

Note
Clicking Run will immediately generate invoices and charge payment profiles. Confirm that the summary information below is correct.

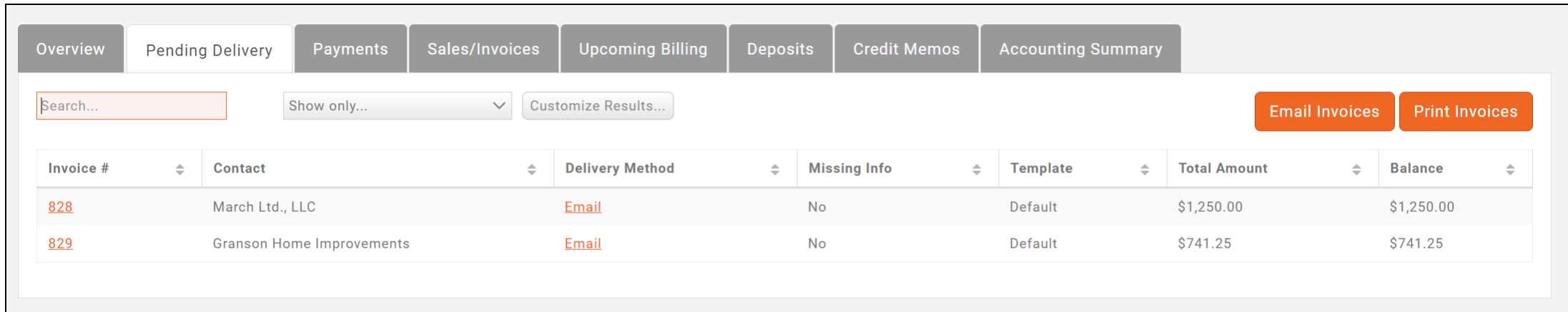
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|--------------------|-------------------------|----------------------|-------------------|
| 2 | 2 | 1/1/2021 - 1/1/2021 | \$693.00 |

Cancel Run

Deliver Invoices

Once you have run your upcoming billing, the invoices are created and you will be able to deliver them from the **Pending Delivery** tab

WIKI: [Deliver Invoices from Pending Delivery tab](#)



The screenshot shows the 'Pending Delivery' tab in the GrowthZone software interface. At the top, there are navigation tabs: Overview, Pending Delivery (selected), Payments, Sales/Invoices, Upcoming Billing, Deposits, Credit Memos, and Accounting Summary. Below the tabs is a search bar with the text 'Search...', a 'Show only...' dropdown menu, and a 'Customize Results...' button. To the right of the search bar are two orange buttons: 'Email Invoices' and 'Print Invoices'. Below these elements is a table with the following columns: Invoice #, Contact, Delivery Method, Missing Info, Template, Total Amount, and Balance. The table contains two rows of data.

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Questions?