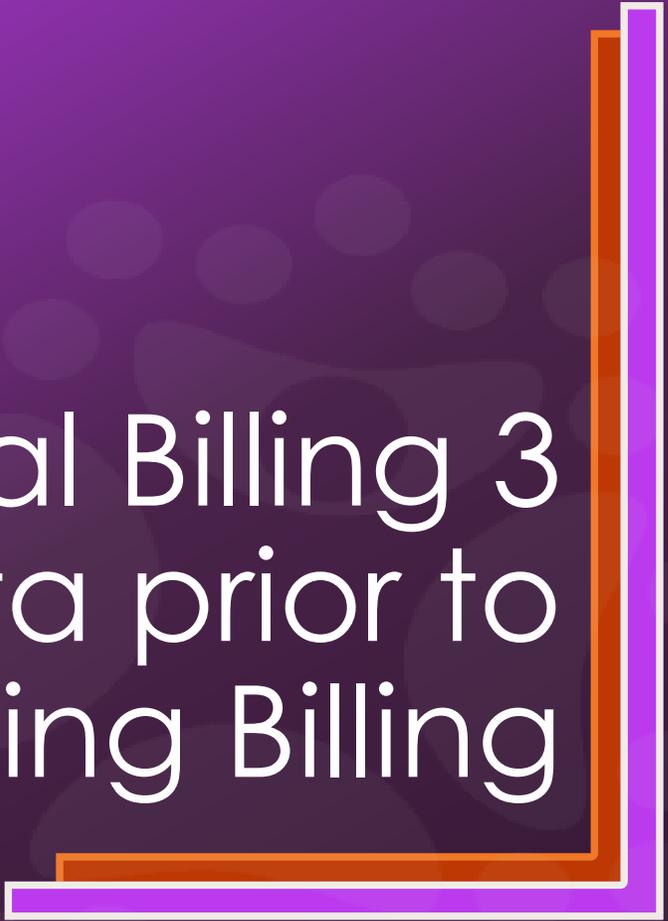


REALTORS® Renewal Billing 3
Verify your Data prior to
Running Billing



Agenda

- Review/Update Next Bill Dates
- Review Reports to Validate Membership Billing
 - *Confirm All Active Members Have Scheduled Billing*
 - *Confirm All Scheduled Billing is Set for the Correct Amount*
 - *Confirm Dropped Members Do Not Have Schedule Billing*
 - *Confirm Members Have an Email Address to Receive Their Invoice*
 - *Check for Expired Payment Profiles*

Review/Update Next Bill Dates

- We've built a tool to help you identify members (if any) that may have the wrong next bill dates for their annual scheduled billings.
- Because your association has set the “renews on” date to Jan 1st for association memberships, the system is able to use that information to identify next bill dates that potentially do not align with the expected date
- KB: [Review Next Bill Dates](#)

Review/Update Next Bill Dates

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Review Reports to Validate Membership 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*
- *How they wish to receive their invoice*

Review Reports to Validate Membership Billing

- *Confirm All Active Members Have Scheduled Billing*
- *Confirm All Scheduled Billing is Set for the Correct Amount*
- *Confirm Dropped Members Do Not Have Schedule Billing*
- *Confirm Members Have an Email Address to Receive Their Invoice*
- *Check for Expired Payment Profiles*

Confirm All Active Members Have Scheduled Billing

Use the Membership Report to verify that all active members have a scheduled billing

KB: View Report of All Active Member Without Recurring Billing

The screenshot shows the 'Membership Report' interface. At the top left is a 'Back' link. At the top right is a 'Run Report' button. The main area contains several filter sections: 'Membership Type' (None Selected), 'Membership Category' (None Selected), 'Good/Service Item' (None Selected), 'Additional Criteria / Filters' (Scheduled Billing Amount), 'Level' (None Selected), 'Start Month' (-- No Choice --), 'Bill Frequency' (-- No Choice --), 'Membership Status' (Active), and 'Renewal Month' (-- No Choice --). Below these is the 'Display Options' section, which includes 'Fields to Display' (Contact Name, Default Email, Default Phone, Membership, Membership Start Date, Membership Status, Renewal Month, Scheduled Billing Amount), 'Summarize By' (Add Summarize By), and 'Display Mode' (Detail). A purple dashed arrow points from the 'Run Report' button to the 'Membership Status' dropdown. Another purple dashed arrow points from the 'Scheduled Billing Amount' dropdown to the 'Fields to Display' list. A red circle with a question mark is located in the bottom right corner of the interface.

Confirm All Scheduled Billing is Set for the Correct Amount

Use the Membership Report to verify that all active members' fees are set properly

KB: View Report of Active Members Scheduled Billing Accuracy

The screenshot shows the 'Membership Report' interface. At the top right, there is a 'Run Report' button. The main area contains several filter sections: 'Membership Type' (set to 'Realtor'), 'Level' (set to 'None Selected'), 'Membership Status' (set to 'Active'), 'Membership Category' (set to 'None Selected'), 'Start Month' (set to '-- No Choice --'), 'Renewal Month' (set to '-- No Choice --'), 'Fee Item' (set to 'None Selected'), and 'Bill Frequency' (set to '-- No Choice --'). Below these is an 'Additional Criteria / Filters' section with a plus sign. The 'Display Options' section includes 'Fields to Display' (with 'Scheduled Billing Amount' selected) and 'Summarize By' (set to 'Scheduled Billing Amount'). The 'Display Mode' is set to 'Detail' and 'Display Summary Count' is checked. A 'Need Help?' button is visible on the right side of the interface.

Confirm Dropped Members Do Not Have Schedule Billing

Use the Membership Report to verify that all dropped members do not have a schedule

KB: View Report of All Dropped/Non-Members With a Recurring Billing

The screenshot shows the 'Membership Report' interface. A red box highlights the 'Membership Status' dropdown menu, which is set to 'Active'. Another red box highlights the 'Next Bill Date' filter, set to '1/1/2023'. A third red box highlights the 'Scheduled Billing Amount' column in the results table, showing values of \$20.00, \$165.00, \$635.00, and \$175.00.

Membership Report

Run Report

Membership Type: None Selected | Level: None Selected | Membership Status: Active

Membership Category: None Selected | Start Month: -- No Choice -- | Renewal Month: -- No Choice --

Fee Item: None Selected | Bill Frequency: -- No Choice --

Additional Criteria / Filters: +

Next Bill Date: [] Equals [] 1/1/2023

Display Options

Fields to Display: Contact Name, Membership, Membership Activation Type, Membership Start Date, Membership Status, Renewal Month, Scheduled Billing Amount

Summarize By: [] | Display Mode: Detail

Results: 4

Contact Name	Membership	Membership Start Date	Membership Activation Type	Membership Status	Renewal Month	Scheduled Billing Amount
Jamie Perd	MLS Membership	9/21/2021	Adjustment	Active	January	\$20.00
Karri Quint	REALTOR® Out of State	7/20/2021	New	Active	January	\$165.00
Lola Anderson	Primary Realtor Membership	11/16/2021	New	Active	January	\$635.00
Mary Malloy	REALTOR® Secondary	11/30/2021	New	Active	January	\$175.00

Count 4

Confirm Members Have a Billing Contact and Email Address

Use the Membership Report for verification. If the membership does not have a billing contact and/or address information, use the adjust membership option to assign this information to the membership

KB: [View Report of Active Members Missing Billing Contact and Billing Email](#)

The screenshot displays the 'Membership Report' interface. At the top right, there is a 'Run Report' button. The main area contains several filter sections: 'Membership Type' (Realtor), 'Level' (None Selected), 'Membership Status' (Active), 'Membership Category' (None Selected), 'Start Month' (-- No Choice --), 'Renewal Month' (-- No Choice --), 'Fee Item' (None Selected), and 'Bill Frequency' (-- No Choice --). A red box highlights the 'Additional Criteria / Filters' section, which includes two criteria: 'Membership Billing Contact Email' and 'Membership Billing Contact Name', both set to 'Is Empty'. Below this, there is an 'OR' selector and a 'Display Options' section. The 'Fields to Display' dropdown is set to 'Contact Name, Default Email, Default Phone, Membership, Membership Activation Type, Membership Start Date, Membership Status, Renewal Month, Scheduled Billing Amount'. The 'Summarize By' dropdown is set to 'Scheduled Billing Amount', and the 'Display Mode' is set to 'Detail'.

Check for Expired Payment Profiles

Use the Stored Payment Profile Report. If cards need to be updated notify your members who can update via the Info Hub

KB: [Stored Payment Profile Report](#)

Stored Payment Profiles Report

Payment Gateway Type: -- No Choice -- | Payment Gateway: -- select a Payment Gateway -- | Last Successful Payment Date: No Dates Selected | Profile Created Date: No Dates Selected

Criteria / Filters: +

Display Options

Fields to Display: Last Successful Payment Date, Payment Gateway Name, Payment Gateway Type, Scheduled Item Count, Contact Name | Summarize By: | Display Mode: Detail

Results

Contact Name	Payment Gateway Name	Payment Gateway Type	Last Successful Payment Date	Scheduled Item Count
East Society	HPS	External Non Integrated		0
Creek Chamber	HPS	External Non Integrated		0
Falls Chamber	HPS	External Non Integrated		0
Park Chamber	American Express:*****3988-4/2017	Stripe		0

American Express:*****1052-3/2020

Questions?