

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

# Agenda

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- 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](#)

### Fix Memberships With Wrong Next Bill Dates ✕

**!** Please enable "Enforce Date Rules on Fixed Renewal Month Memberships" membership setting on Setup -> Membership settings

[DOWNLOAD](#)

Use this screen to update Next Bill Dates for annual scheduled billing. Filter by Status, Membership Type or Current Next Bill Date, then click Load to see the proposed results.

The selections in place when you click Update will have their Current Next Bill Date changed to the Proposed Next Bill Date.

Filter

Contact Status

Membership Type

Current Next Bill Date

# 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

## Membership Scheduled Billing

Membership	Bill Contact	Frequency	Amount	Discount	Payment Profile	Start Date	Next Bill Date	End Date
Realtor	Petra Kaxok	Annually	\$470.00 (Voluntary \$50.00)	\$0.00		6/2/2023	1/1/2024	

# 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

The screenshot shows the 'Membership Report' interface. At the top left is a back arrow and the title 'Membership Report'. At the top right are three dots and a 'RUN REPORT' button. The main area contains several filter sections:

- Membership Type:** A dropdown menu with 'X Realtor,' selected.
- Level:** An empty dropdown menu.
- Membership Status:** A dropdown menu with 'X Active,' selected.
- Membership Category:** An empty dropdown menu.
- Start Month:** An empty dropdown menu.
- Renewal Month:** An empty dropdown menu.
- Fee Item:** An empty dropdown menu.
- Bill Frequency:** An empty dropdown menu.

Below these is the 'Additional Criteria / Filters' section, which is expanded to show a filter: 'X Scheduled Billing Amount,' followed by 'Is Empty' and a close button 'x'.

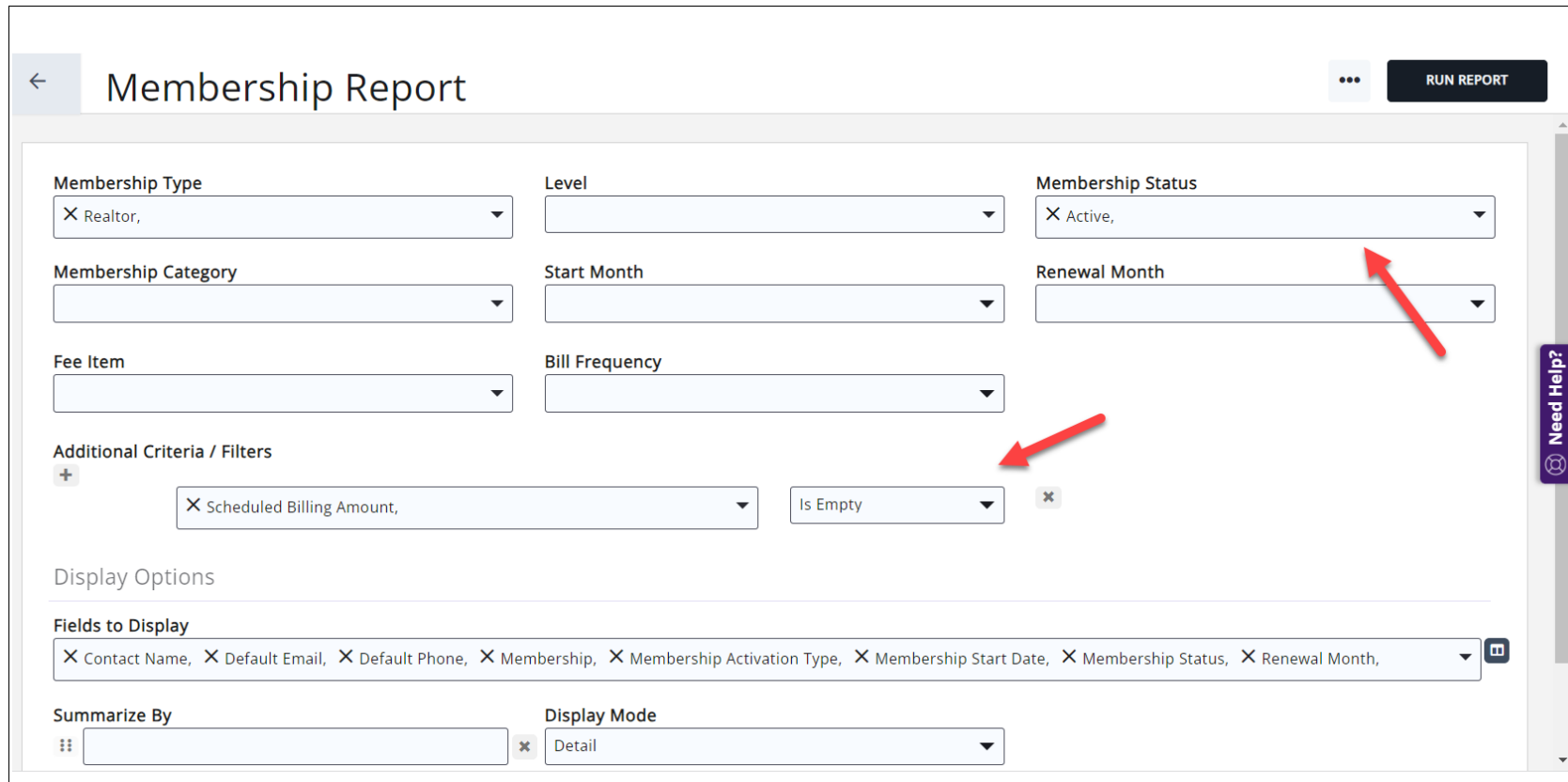
The 'Display Options' section includes:

- Fields to Display:** A dropdown menu containing 'X Contact Name, X Default Email, X Default Phone, X Membership, X Membership Activation Type, X Membership Start Date, X Membership Status, X Renewal Month,' and a plus icon.
- Summarize By:** A dropdown menu with a list icon and an 'x' button.
- Display Mode:** A dropdown menu with 'Detail' selected and a close button 'x'.

On the right side of the interface, there is a vertical 'Need Help?' button with a question mark icon.

# 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 arrow and the title 'Membership Report'. At the top right are a menu icon and a 'RUN REPORT' button. The main area contains several filter sections:

- Membership Type:** A dropdown menu with 'X Realtor,' selected.
- Level:** An empty dropdown menu.
- Membership Status:** A dropdown menu with 'X Active,' selected. A red arrow points to this dropdown.
- Membership Category:** An empty dropdown menu.
- Start Month:** An empty dropdown menu.
- Renewal Month:** An empty dropdown menu.
- Fee Item:** An empty dropdown menu.
- Bill Frequency:** An empty dropdown menu.
- Additional Criteria / Filters:** A section with a '+' icon containing two filters: 'X Scheduled Billing Amount,' and 'Is Empty'. A red arrow points to the 'Is Empty' filter.
- Display Options:** A section with a '+' icon.
- Fields to Display:** A dropdown menu with 'X Contact Name, X Default Email, X Default Phone, X Membership, X Membership Activation Type, X Membership Start Date, X Membership Status, X Renewal Month,' selected.
- Summarize By:** A dropdown menu with a list icon and 'x'.
- Display Mode:** A dropdown menu with 'Detail' selected.

A vertical 'Need Help?' button is located on the right side of the interface.

# Confirm All Active Members Have Scheduled Billing

If an active member does not have a schedule you will need to perform an upgrade or downgrade to pull in a schedule

KB: [Membership Changes](#)

Edit Membership

Details

**Change Type**  
Upgrade

Type\*  
Realtor

Level

Term  
0

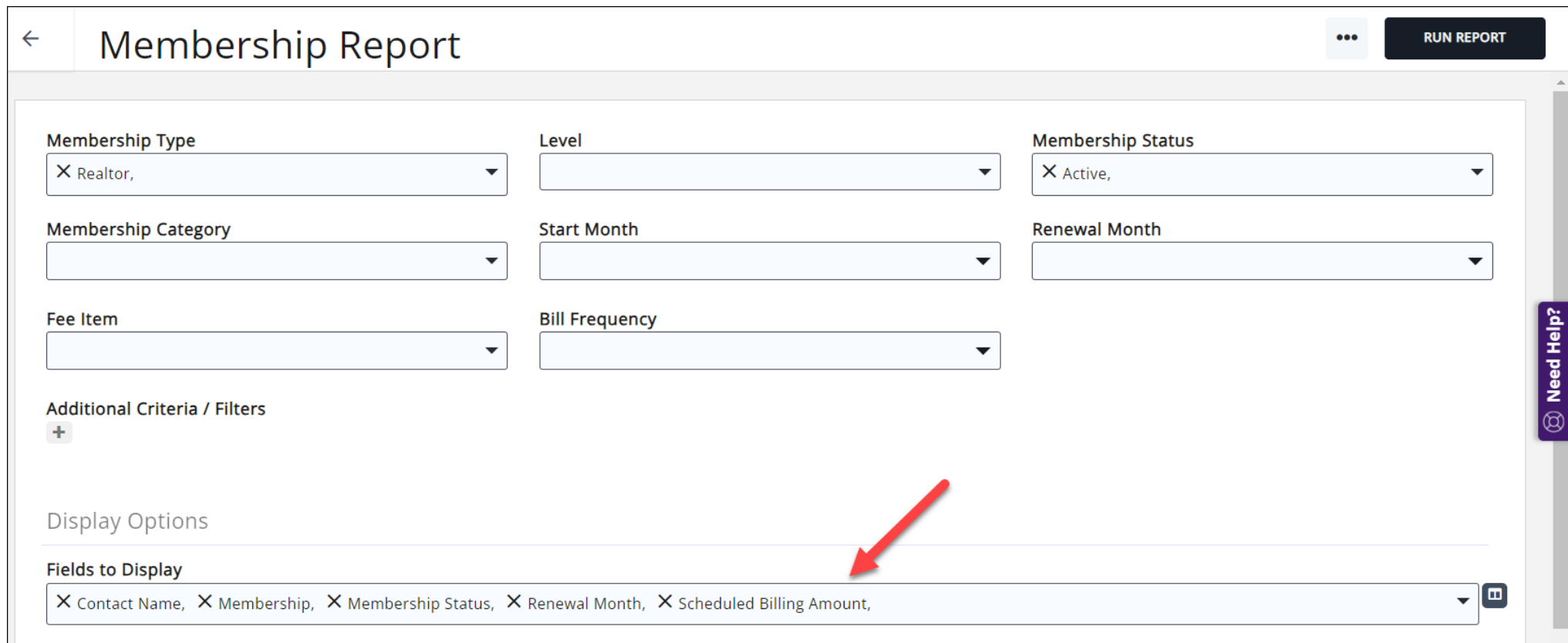
Staff

Notes

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](#)



Membership Report

← ... RUN REPORT

Membership Type: X Realtor, Level: Membership Status: X Active,

Membership Category: Start Month: Renewal Month:

Fee Item: Bill Frequency:

Additional Criteria / Filters +

Display Options

Fields to Display: X Contact Name, X Membership, X Membership Status, X Renewal Month, X Scheduled Billing Amount, [icon]

Need Help?



Confirm All Scheduled Billing is Set for the Correct Amount

If a member's scheduled billing amount is incorrect you will need to do an Adjust Membership to change the fee

KB: [Adjust Membership](#)

Edit Membership

Details

**Change Type**  
Adjustment

Type  
Realtor

Term  
12

Notes

Recurring Fee Items

Frequency \*  
Quarterly

Next Bill Date ⓘ  
7/1/2023

Fee Item *	Description	Price	Tax	Total	Discount	Amount	Hide
Local Membership Dues	Local Membership Dues	165	\$0.00	\$165.00	0.00 (0)	\$41.25	<input type="checkbox"/>
National Dues	National Dues	150	\$0.00	\$150.00	0.00 (0)	\$37.50	<input type="checkbox"/>

# 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](#)

This is rare. If you do find those with schedules contact our support

The screenshot shows the 'Membership Report' interface. At the top left is a back arrow and the title 'Membership Report'. At the top right are a menu icon (three dots) and a 'RUN REPORT' button. The main area contains several filter sections:

- Membership Type:** A dropdown menu with 'X Realtor,' selected.
- Level:** An empty dropdown menu.
- Membership Status:** A dropdown menu with 'X Dropped,' selected. A red arrow points to this field.
- Membership Category:** An empty dropdown menu.
- Start Month:** An empty dropdown menu.
- Renewal Month:** An empty dropdown menu.
- Fee Item:** An empty dropdown menu.
- Bill Frequency:** An empty dropdown menu.
- Additional Criteria / Filters:** A section with a '+' icon containing two filters: 'X Scheduled Billing Amount,' and 'Is Not Empty'. A red arrow points to the 'Is Not Empty' filter.

On the right side of the interface, there is a vertical purple button labeled 'Need Help?' with a question mark icon.

Confirm Members Have a Billing Contact and Email Address

Use the Membership Report for verification.  
KB: [View Report of Active Members Missing Billing Contact and Billing Email](#)

← Membership Report ... **RUN REPORT**

Membership Type X Realtor, ▼	Level ▼	Membership Status X Active, ▼
Membership Category ▼	Start Month ▼	Renewal Month ▼
Fee Item ▼	Bill Frequency ▼	

**Additional Criteria / Filters**

+  
X Membership Billing Contact Email, ▼ Is Empty ▼ ×

AND ▼ X Membership Billing Contact Name, ▼ Is Empty ▼ ×

Need Help?

## Confirm Members Have a Billing Contact and Email Address

If the membership does not have a billing contact and/or Email information, use the Adjust membership option to assign this information to the membership

KB: [Adjust Membership](#)

Invoice Options


Print  Email

Billing Contact\*

Billing Address

Billing Email

Invoice Terms



# 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](#)

The screenshot shows the filter and display options for the Stored Payment Profile Report. The interface includes the following sections:

- Payment Gateway Type:** A dropdown menu.
- Payment Gateway:** A dropdown menu.
- Last Successful Payment Date:** A dropdown menu with "No Dates Selected" selected.
- Profile Created Date:** A dropdown menu with "No Dates Selected" selected.
- Additional Criteria / Filters:** A section with a "+" icon. It contains a filter for "Scheduled Item Count" with a value of "Greater Than" and "0". A red arrow points to this filter.
- Display Options:** A section with a "+" icon.
- Fields to Display:** A dropdown menu showing "Last Successful Payment Date, Payment Gateway Name, Payment Gateway Type, Scheduled Item Count, Contact Name".
- Summarize By:** A dropdown menu with a "+" icon.
- Display Mode:** A dropdown menu with "Detail" selected.

A vertical "Need Help?" button is located on the right side of the interface.

# Questions?