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

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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

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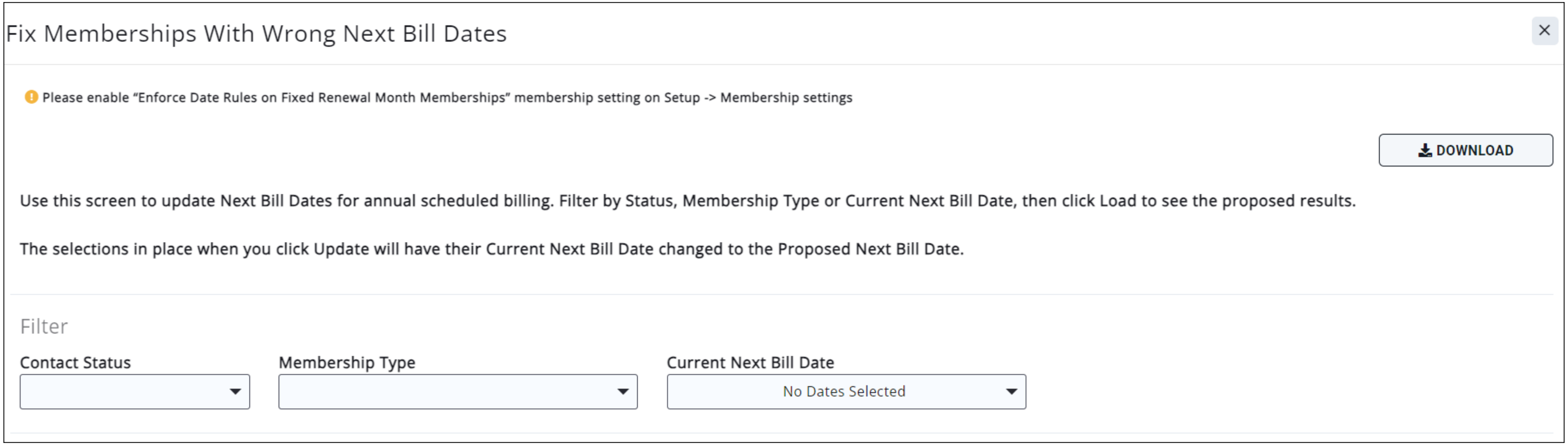
Review/Update Next Bill Dates

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



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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

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	

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Review Reports to Validate Membership Billing

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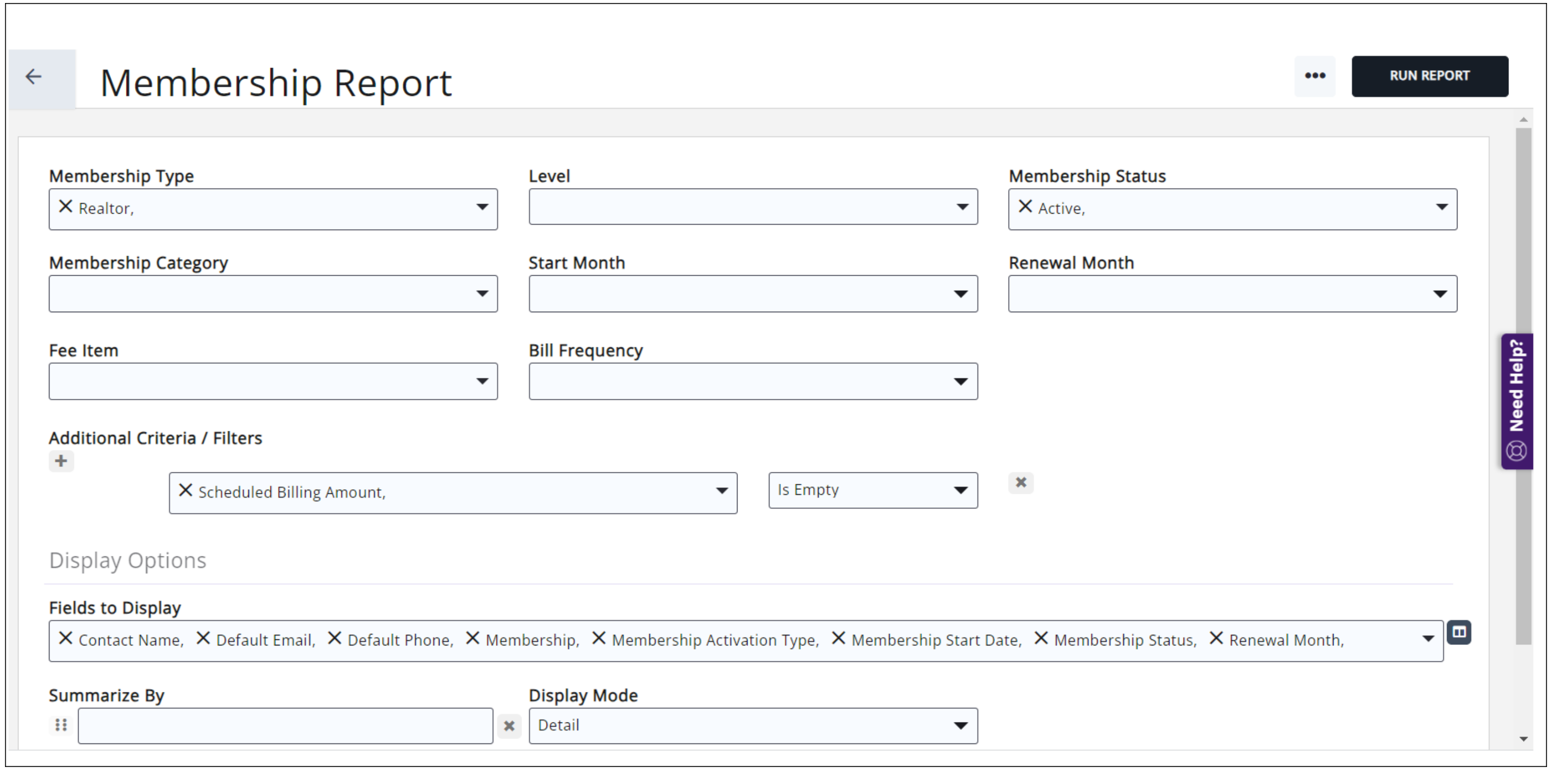
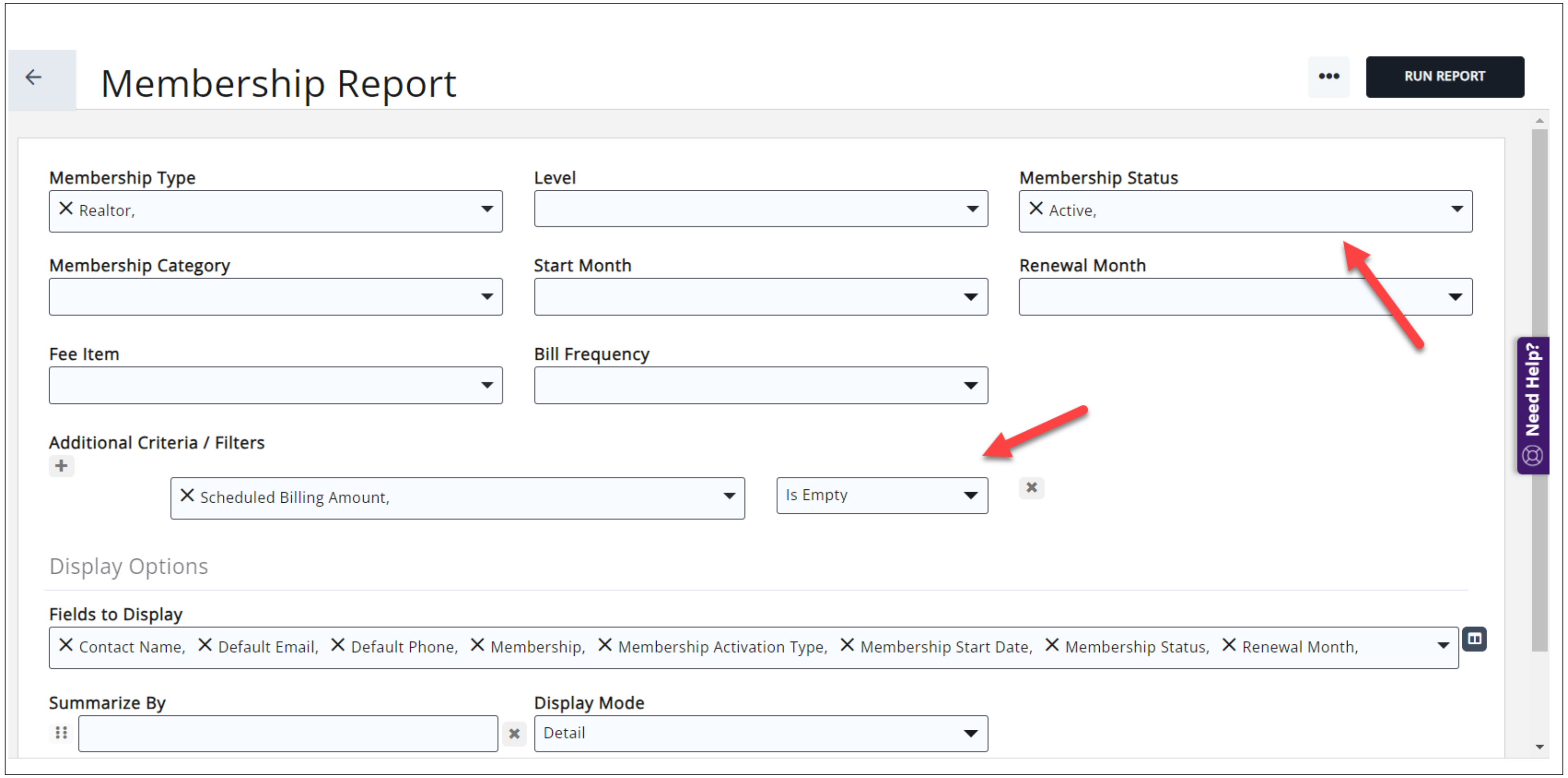


Confirm All Active Members Have Scheduled Billing

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

KB: View Report of All Active Member Without Recurring Billing



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]

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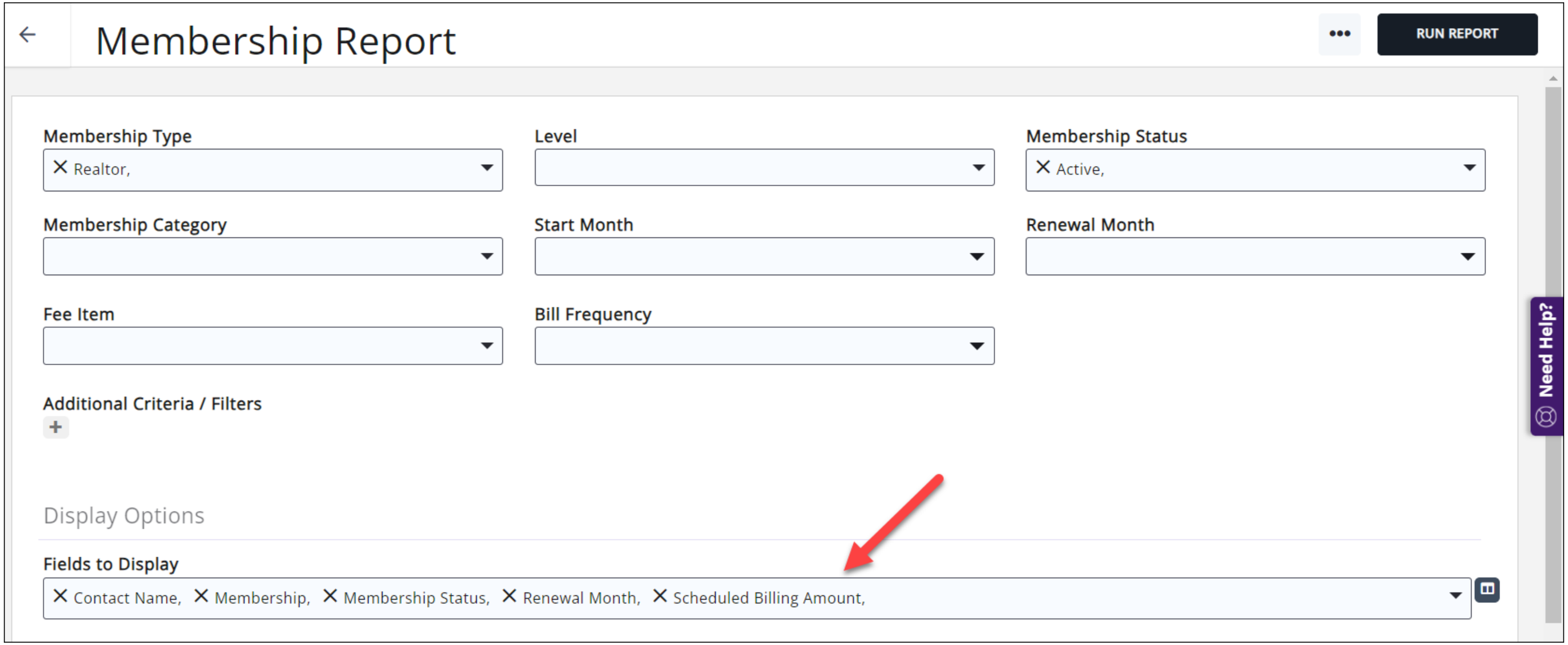
Confirm All Scheduled Billing is Set for the Correct Amount

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

KB: [View Report of Active Members Scheduled Billing Accuracy]



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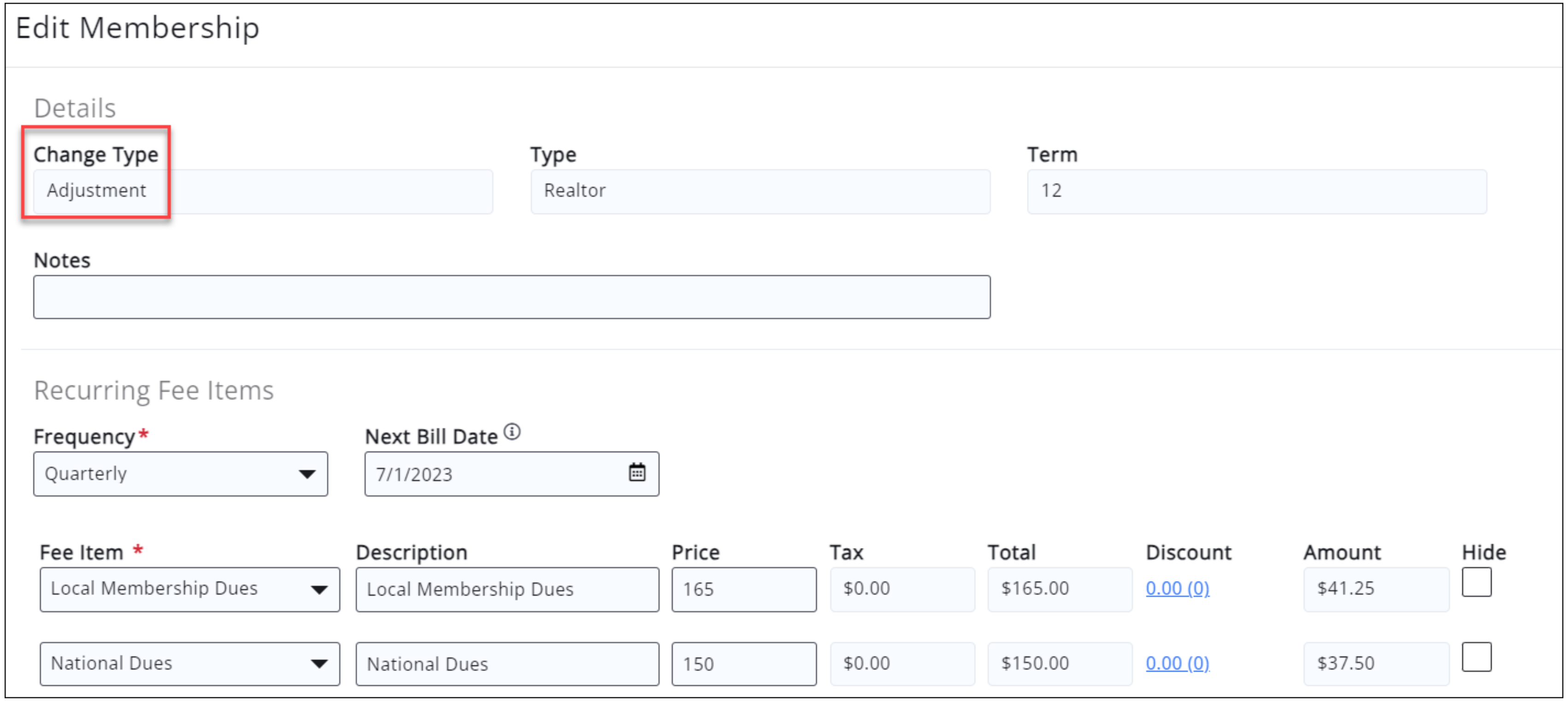
Confirm All Scheduled Billing is Set for the Correct Amount

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

KB: [Adjust Membership]



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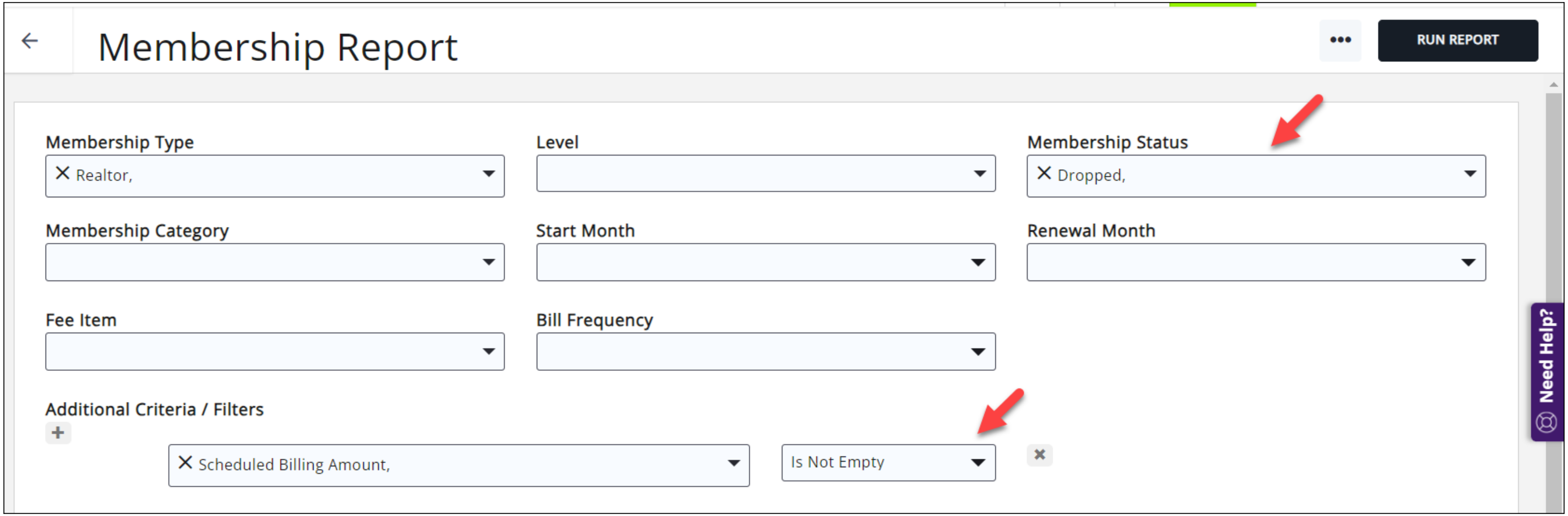
Confirm Dropped Members Do Not Have Schedule Billing

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

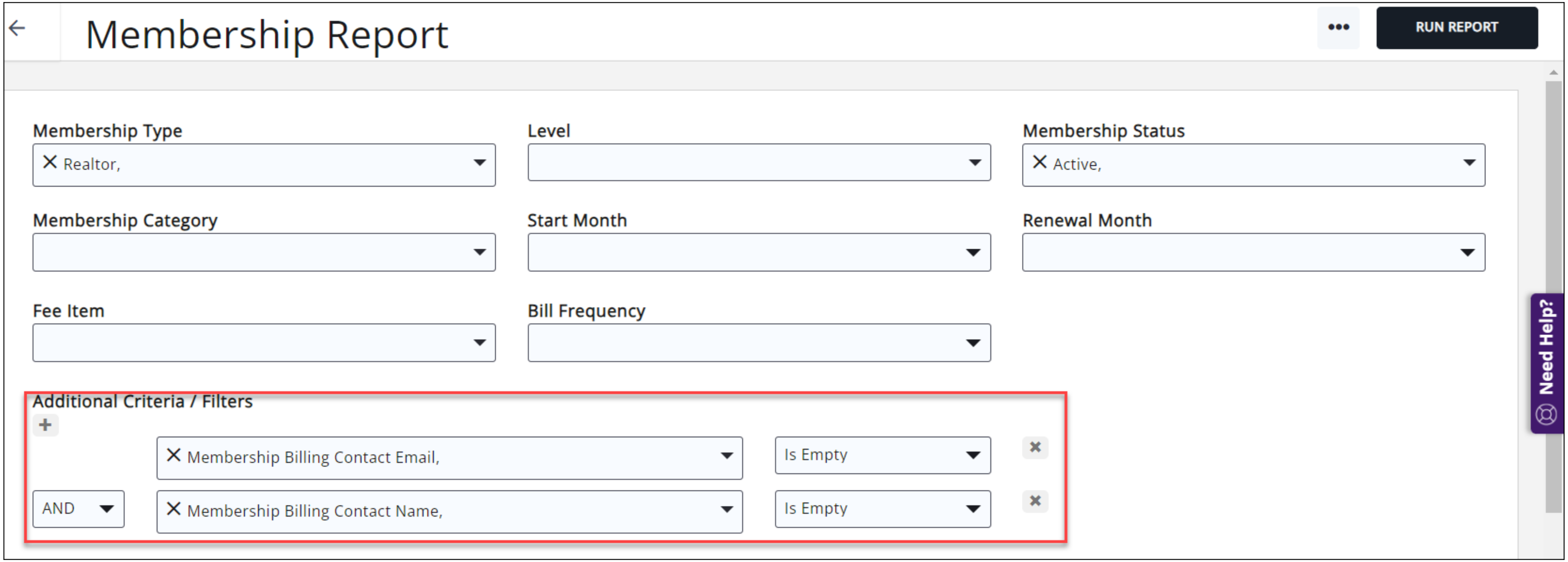
This is rare. If you do find those with schedules contact our support



Confirm Members Have a Billing Contact and Email Address

Use the Membership Report for verification.

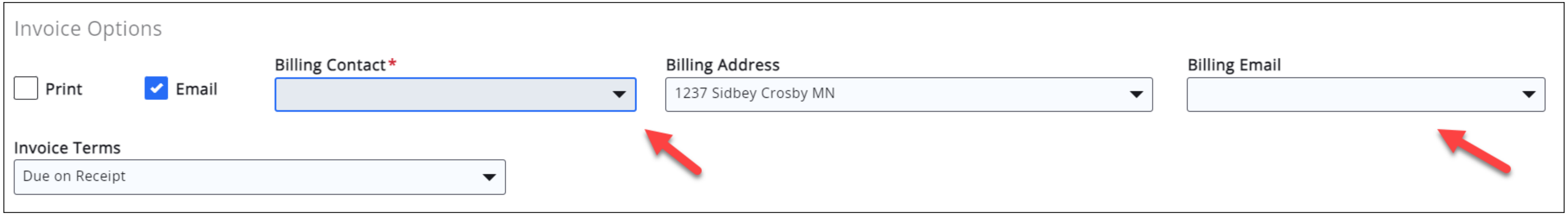
KB: View Report of Active Members Missing Billing Contact and Billing Email



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

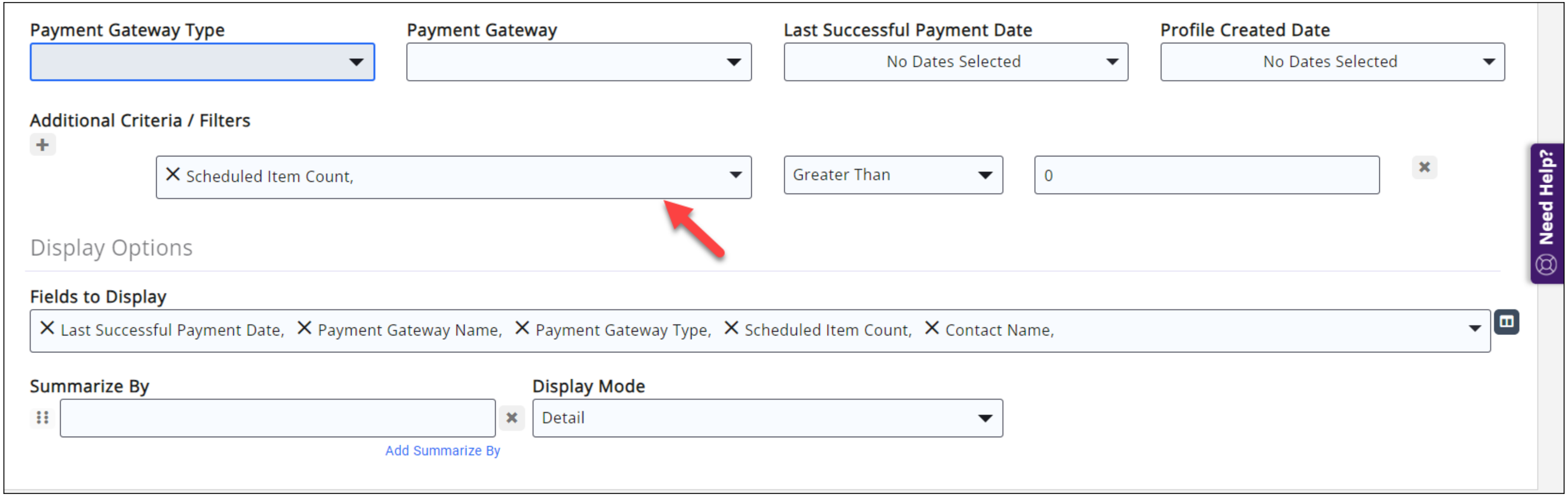
KB: Adjust Membership



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



Questions?

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