REALTORS® Renewal Billing 4 - Run Your Upcoming Billing



Agenda

- Final Prep
 - Review Invoice Template
 - Review Email Template to Send with Invoices
 - Review Member-Facing Automated Messages
 - Ensure Staff Enable Billing Related Notifications
- Run Upcoming Billing
- Deliver Renewal Invoices



Review Invoice Templates

We suggest creating a new invoice template for each year's association dues billing so that you have a chance to review your dues deductibility statement and update other policies that may have changed since last year

• KB: <u>View/Modify Invoice</u> <u>Template</u> CP Realtor Board INTERNAL



INVOICE 2972 PO NUMBER		1/1/2024
BILL TO	MESSAGE	
Jack Anderson		

Jack Anderson 657 West Larson Lane Baxter, MN 87345

QUANTITY	DESCRIPTION		UNIT PRICE	TOTA
1	Local Membership Dues	Annual	165.00	165.0
1	National Dues	Annual	160.00	160.0
1	State Dues	Annual	100.00	100.0
1	NAR Image	Annual	45.00	45.0
1	RPAC (Voluntary)	Annual	50.00	50.0
	SUBTOTAL			520.0
	SALES TAX			0.0
	SHIPPING & HANDLING			0.0
	TOTAL			520.0

INCLUDING VOLUNTARY

PAYMENT/CREDIT/WRITE OFF/DISCOUNTS APPLIED

TOTAL DUE BY 1/1/2024

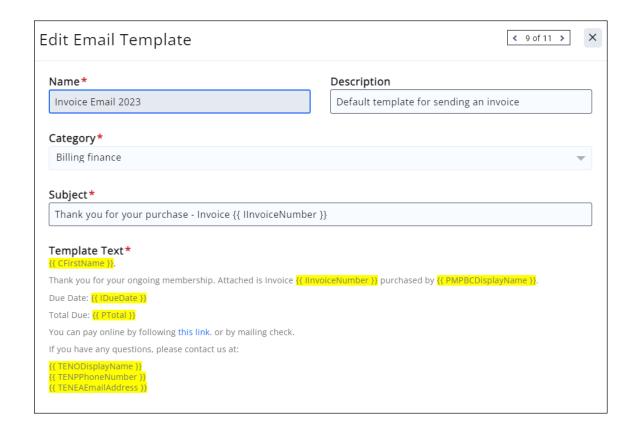


(0.00) **520.00**

Review eMail Templates

Creating a new email template for each year's association dues billing makes it easy for you and your staff to collaborate on your billing preparations.

KB: Working with eMail templates



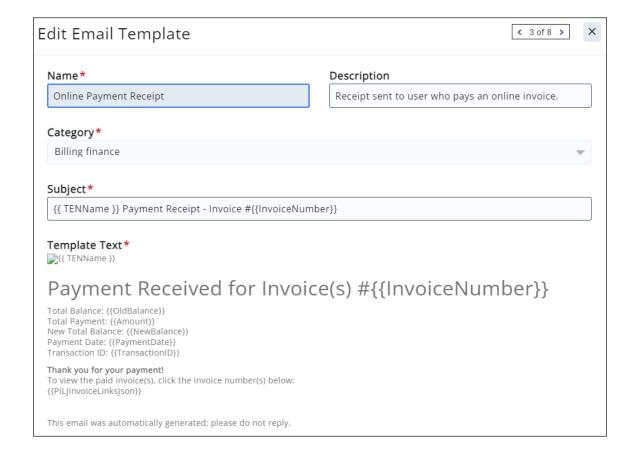


Review Member-Facing Automated Messages

The following emails will be sent to members throughout the invoicing and payment process:

- ✓ Online Payment Receipt
- ✓ The Recurring Charge Failed

KB: <u>Automated Messaging</u>

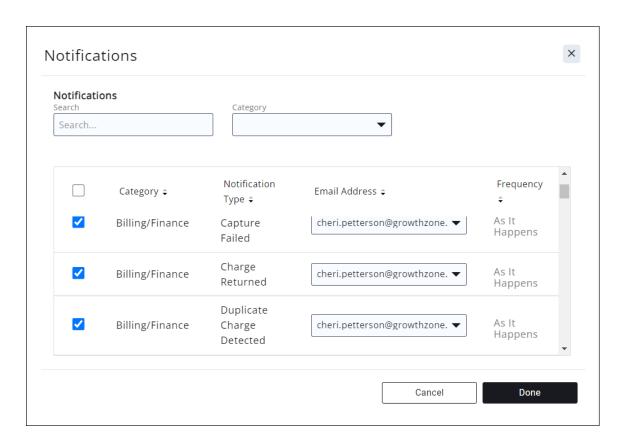




Ensure Staff Enable Billing Related Notifications

Make sure that you and your staff receive the right notifications to keep your billing process running smoothly:

- Auto Payment Failed
- Charge Capture Failed
- Duplicate Charge Detected
- Failure to Send Receipt





Run Upcoming Billing

You are now ready to generate your invoices for local, state, national dues as well as the Image Fee, RPAC, and any other donations or dues your association collects.

KB: Generate Invoices for Upcoming (Recurring) Billing

Billing										
Overview	Pending Delivery	Payments Sales	s/Invoices	Upcoming Billing	Deposits	Credit Memo	s Accou	nting Summary		
Search		Q	9	X Month: January -	2024 X Memb	ership Types : Realt	or		⊗ ADD BILLING ▼	
Customer	Next Bill Date	e Bill Contact	↓ .	Description		Frequency	Bundled	Amount	Payment Profile	
Petra Kaxok	1/1/2024	Petra Kaxok		RPAC		Annually	No	\$50.00 &		Help?
Petra Kaxok	1/1/2024	Petra Kaxok		National Dues		Annually	No	\$160.00 🕏		ਰ 🎚
Petra Kaxok	1/1/2024	Petra Kaxok		Local Membership Dues		Annually	No	\$165.00 2		Nee (
Petra Kaxok	1/1/2024	Petra Kaxok		State Dues		Annually	No	\$100.00 2		
Petra Kaxok	1/1/2024	Petra Kaxok		NAR Image		Annually	No	\$45.00 3		



Deliver Invoices

Deliver your invoices from the **Sales/Invoices** tab in the billing module. Filter to the invoice date for the invoices you have just created

KB: Deliver renewal invoices

Billing	5								
Overview	Pending Delivery	Paym	ents Sales/Invoices	U	pcoming Billing Deposits Cre	edit Memos	Accounting	Summary	
Search			Q 9	7	X Membership Type: Realtor				NEW INVOICE -
Туре	Date	Ref#	Customer	ŢĒ	Description	Aging	Balance	Total	Actions
Invoice	5/1/2023	2965	Andi Haard		Local Membership Dues	32	\$115.00	\$115.00	•••
Invoice	3/11/2021	45	Andi Haard		MLS Dues	813	\$0.00	\$360.00	•••
Invoice	8/24/2022	2767	Anne Johnson		Book 2022	282	\$0.00	\$175.00	•••
Invoice	5/3/2022	2599	Anne Johnson		Local Membership Dues	395	\$940.00	\$1,015.00	•••
Invoice	5/3/2022	2597	Anne Johnson		Local Membership Dues	395	\$0.00	\$415.00	•••
Invoice	9/7/2022	2808	Ben Raters		Local Membership Dues	268	\$0.00	\$173.33	•••



Deliver Invoices

After filtering the invoices, prepare to send them by clicking the next to New Invoice and selecting Email Invoices/Statements

Edit Email Invoices / Statements	×
General	
Deliver Type *	File Format*
Invoices	Pdf ▼
Invoice Template	Exclude Voluntary
From*	Template
▼ 🗗	•
Subject *	



Questions?



Questions?