

# REALTORS® Renewal Billing 4 - Run Your Upcoming Billing

# Agenda

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- 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: [View/Modify Invoice Template](#)

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	TOTAL	
1	Local Membership Dues	Annual	165.00	165.00
1	National Dues	Annual	160.00	160.00
1	State Dues	Annual	100.00	100.00
1	NAR Image	Annual	45.00	45.00
1	RPAC (Voluntary)	Annual	50.00	50.00
SUBTOTAL			520.00	
SALES TAX			0.00	
SHIPPING & HANDLING			0.00	
TOTAL			520.00	
PAYMENT/CREDIT/WRITE OFF/DISCOUNTS APPLIED			(0.00)	
TOTAL DUE BY 1/1/2024		INCLUDING VOLUNTARY ITEMS	520.00	

# Review eMail Templates

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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](#)

Edit Email Template < 9 of 11 > ✕

**Name\***  **Description**

**Category\***

**Subject\***

**Template Text\***  
{{ CFirstName }}  
Thank you for your ongoing membership. Attached is Invoice {{ InvoiceNumber }} purchased by {{ PMPBCDisplayName }}.  
Due Date: {{ IDueDate }}  
Total Due: {{ PTotal }}  
You can pay online by following [this link](#). or by mailing check.  
If you have any questions, please contact us at:  
{{ TENODisplayName }}  
{{ TENPPhoneNumber }}  
{{ TENEEmailAddress }}

# Review Member-Facing Automated Messages


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

- ✓ Online Payment Receipt
- ✓ The Recurring Charge Failed

KB: [Automated Messaging](#)

Edit Email Template < 3 of 8 > ✕

<b>Name*</b>	<b>Description</b>
<input type="text" value="Online Payment Receipt"/>	<input type="text" value="Receipt sent to user who pays an online invoice."/>
<b>Category*</b>	
<input type="text" value="Billing finance"/>	
<b>Subject*</b>	
<input type="text" value="{{ TENName }} Payment Receipt - Invoice #{{InvoiceNumber}}"/>	
<b>Template Text*</b>	
 {{ TENName }}	
<b>Payment Received for Invoice(s) #{{InvoiceNumber}}</b>	
Total Balance: {{OldBalance}}	
Total Payment: {{Amount}}	
New Total Balance: {{NewBalance}}	
Payment Date: {{PaymentDate}}	
Transaction ID: {{TransactionID}}	
<b>Thank you for your payment!</b>	
To view the paid invoice(s), click the invoice number(s) below: {{PI LJInvoiceLinksjson}}	
This email was automatically generated; please do not reply.	

# 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

### Notifications

Search  Category

<input type="checkbox"/>	Category	Notification Type	Email Address	Frequency
<input checked="" type="checkbox"/>	Billing/Finance	Capture Failed	<input type="text" value="cheri.petterson@growthzone."/>	As It Happens
<input checked="" type="checkbox"/>	Billing/Finance	Charge Returned	<input type="text" value="cheri.petterson@growthzone."/>	As It Happens
<input checked="" type="checkbox"/>	Billing/Finance	Duplicate Charge Detected	<input type="text" value="cheri.petterson@growthzone."/>	As It Happens

# 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/Invoices **Upcoming Billing** Deposits Credit Memos Accounting Summary

Search... 🔍 ⚡ ⚙️ <sup>2</sup> X Month: January - 2024 X Membership Types: Realtor X ADD BILLING ▼

Customer	Next Bill Date	Bill Contact	↓↑ Description	Frequency	Bundled	Amount	Payment Profile
Petra Kaxok	1/1/2024	Petra Kaxok	RPAC	Annually	No	\$50.00 🔄	
Petra Kaxok	1/1/2024	Petra Kaxok	National Dues	Annually	No	\$160.00 🔄	
Petra Kaxok	1/1/2024	Petra Kaxok	Local Membership Dues	Annually	No	\$165.00 🔄	
Petra Kaxok	1/1/2024	Petra Kaxok	State Dues	Annually	No	\$100.00 🔄	
Petra Kaxok	1/1/2024	Petra Kaxok	NAR Image	Annually	No	\$45.00 🔄	

Need Help?




# 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

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

Search...    X Membership Type: **Realtor** NEW INVOICE

Type	Date	Ref #	Customer	Description	Aging	Balance	Total	Actions
Invoice	5/1/2023	<a href="#">2965</a>	Andi Haard	Local Membership Dues	32	\$115.00	\$115.00	...
Invoice	3/11/2021	<a href="#">45</a>	Andi Haard	MLS Dues	813	\$0.00	\$360.00	...
Invoice	8/24/2022	<a href="#">2767</a>	Anne Johnson	Book 2022	282	\$0.00	\$175.00	...
Invoice	5/3/2022	<a href="#">2599</a>	Anne Johnson	Local Membership Dues	395	\$940.00	\$1,015.00	...
Invoice	5/3/2022	<a href="#">2597</a>	Anne Johnson	Local Membership Dues	395	\$0.00	\$415.00	...
Invoice	9/7/2022	<a href="#">2808</a>	Ben Raters	Local Membership Dues	268	\$0.00	\$173.33	...

 Need Help?



# 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

<b>Deliver Type *</b> Invoices ▼	<b>File Format *</b> Pdf ▼
<b>Invoice Template</b> ▼	<input type="checkbox"/> Exclude Voluntary
<b>From *</b> ▼ +	<b>Template</b> ▼
<b>Subject *</b> _____	

# Questions?

Questions?

