REALTOR® Association Post-Billing Guide

This guide includes setup and processes for actions that your association may take for overdue agents. You are welcome to use some, none, or all of the processes here to collect overdue payments from your members. While some of these processes will work for collecting MLS or lockbox fees, this guide primarily focuses on association dues (local, state, and national), as you'll see in the examples below.

If you have questions about whether a particular setting or workflow is right for your association, use the provided notes section and contact our support team to discuss your questions.

In this guide, you'll find the following:

Terminology Glossary:

- **Broker** = Designated REALTOR®
- **Association dues/membership** = local, state, national, RPAC, and image fee that allows an agent to be a REALTOR®

In-App Training:

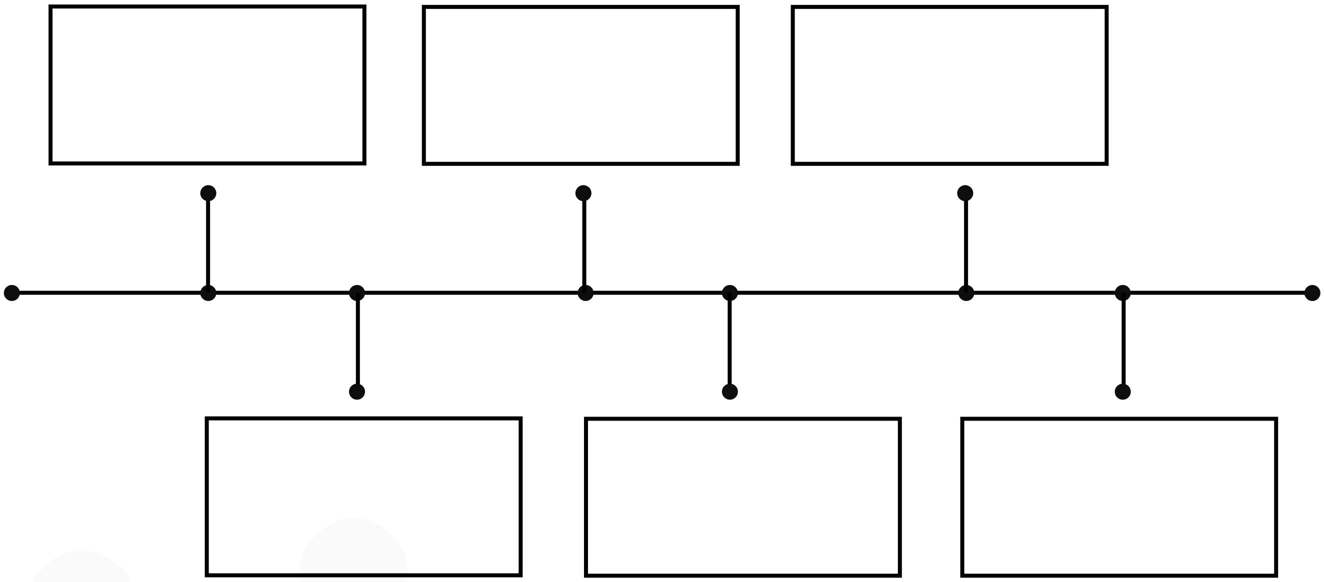
Click the "Need Help?" tab on the right side of any GrowthZone screen to open our new Resource Center. In there, you'll find interactive guides and training to help you configure the system as suggested below. Look for sections of this document marked with , indicating there is an in-app guide to walk you through those steps in more detail.

Last Updated: September 9, 2022

Intro: Outline Your Association's Processes

☐ Defining Your Timeline

Each Real Estate association has unique process, procedures, and schedules for tracking and collecting overdue invoices. The processes defined in this document are designed to support your needs, whether you utilize all some, all, or very few of them. Use the blank timeline below to outline when your association will take different actions on overdue invoices like adding late fees or suspending agents.



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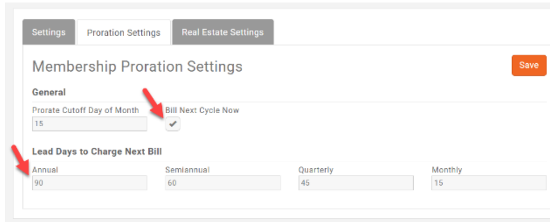
1. Collect 2022 and 2023 Dues from New Members

After invoicing your active agents for 2023 dues, collecting prorated 2022 dues and 2023 dues from new agents/members is important. GrowthZone has two features to make this as easy as possible by creating the correct invoices and saving a credit card for new member applications.

☐ 1.1 Create Prorated 2022 Dues Invoice and Full 2023 Dues Invoice

Setup > Memberships, Membership Settings > Proration Settings tab

In-app guide available, under the "Need Help?" tab.



- **Enable Bill Next Cycle Now**
  The system will create a prorated invoice for the remainder of the current billing cycle and an invoice for the next billing cycle.

- **Set Lead Days to Charge Next Bill**
  Per billing frequency, the number of days before a new billing cycle that the system will create an invoice for the current billing cycle and the next billing cycle. You generally want this to start on or slightly before the day you create invoices for your active members' association dues.

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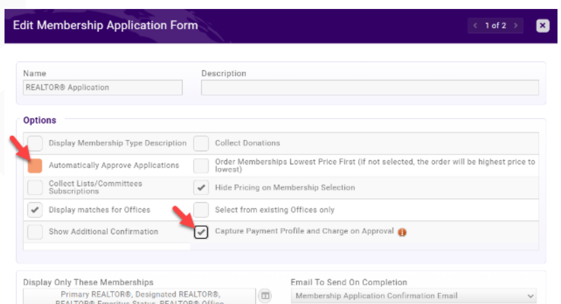
Example: If you send out invoices on October 1st, you may want to set the Annual frequency to 95 days. For 2022, this means that any member who joins on or after Wednesday September 28th will be invoiced for their 2022 and 2023 dues after submitting their application.

NOTE: **This setting applies to all memberships in your system,** so be sure to review the settings for all billing frequencies that you use for MLS fees, lockbox fees, or other memberships.

☐ 1.2 Capture Credit Card on Application and Charge on Membership Approval

Setup > Memberships, Application Forms

In-app guide available, under the "Need Help?" tab.



- **Disable Automatically Approve Applications**
  You and your staff should have a chance to review applications before approving them. This gives you a chance to review their letter of good standing, check their license, and do any other checks. This is likely already disabled for your association membership

application but if enabled, this setting will prevent you from enabling the next setting.

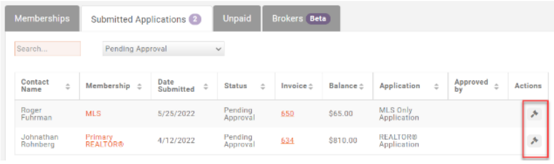
- **Enable Capture Payment Profile and Charge on Approval**
  Applicants will be required to provide a credit card before submitting a membership application. When you're ready to approve the new member, the system will charge their provided credit card.

  NOTE: When used in conjunction with the *Bill Next Cycle Now* feature from section 1.1 above, the system will create two charges in eCommerce. One charge for the prorated 2022 invoice will send with a 2022 billing year, and one charge for the full 2023 invoice will send with a 2023 billing year. The 2023 invoice will be dated 1/1/2023, which may create an AR credit that rolls over from 2022 to 2023. Depending on how many members join your association at the end of the year, you may want to discuss this with your accountant before turning on this setting.

Notes/Questions:

☐ 1.3 Process Submitted Membership Applications *Memberships > Submitted Applications tab*

In-app guide available, under the "Need Help?" tab.



- **Review and Approve Membership Application**
  For current and future pending applications, click on the Gavel icon to view the applicant's information. The *View Application* button will show information as it was entered on the form.

  NOTE: Before approving the membership, double-check that the NRDS ID that will be used for the payment is correct. This will typically be your default NRDS ID (often your AE's ID) or the new ID you've created for the new agent. Either one is fine, but it's important to double-check to make sure you're following your association's process.

Notes/Questions:

2. Late Fees

Late fees in GrowthZone are added to unpaid invoices. You'll select the overdue invoices that should receive a late fee and then add the late fee. Members who never received a dues invoice will not have a late fee added.

Late fees are added as a new line item on the original invoice. The late fee line item will have an "invoice date" of the date that the late fee was added. This ensures that you do not unintentionally create new AR activity in a previously closed month.

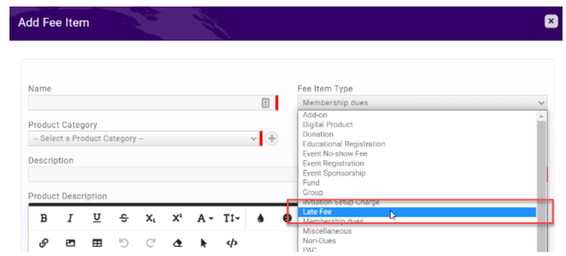
☐ 2.1 Setting up Late Fees

Setup > Services, Products, and Commerce; Fee Items

In-app guide available, under the "Need Help?" tab.

Create Late Fee - Fee Items

Create a new fee item and set the Fee Item Type to *Late Fee*. Set the Product Category and Description fields as you'd like. Work with your accountant to set the appropriate Income, Receivables, and Deposit Accounts. Do not check the *Is Recurring Fee* checkbox. If you add multiple late fees to overdue association dues invoices, you can use the same fee item for each round of late fees if all the money goes to the same GL accounts.



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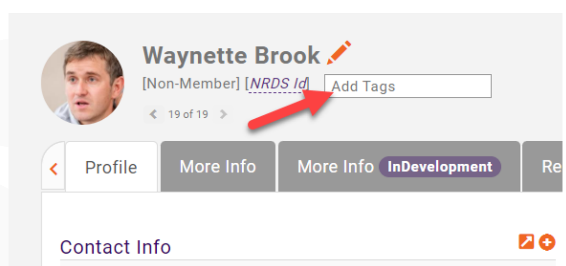
☐ 2.2 Flag Contacts to Exclude

Contacts> Profile tab

Define Tag to Exclude Agents from Late Fees

If you allow members to make special arrangements to pay their dues on an alternate schedule to avoid late fees, the best way to exclude these agents from receiving a late fee (or suspension) is to apply a tag to their contact. You can exclude these agents or members when filtering the list of invoices to receive late fees. Example tag: "No Late Fees"

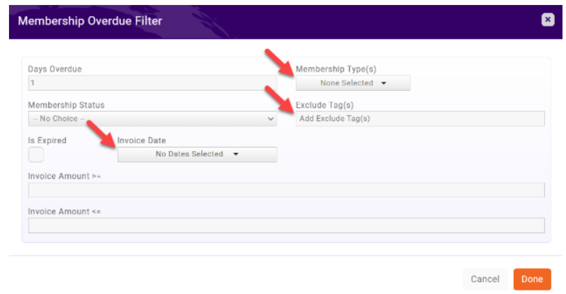


Notes/Questions:

☐ 2.3 Add Late Fees to Agents *Memberships> Unpaid tab> Customize Results*

In-app guide available, under the "Need Help?" tab.

- **Filter Unpaid Invoices to Overdue Association Dues Invoices**
  By default, this screen lists all open invoices for membership dues. Filter by membership type, invoice date, and tag so that only the correct overdue invoices will receive a late fee:
  - *Membership Types*: All association memberships that have local, state, and national dues
    (This excludes any MLS or lockbox fees that may be on a different schedule)
  - *Invoice Date*: Date used on initial run of association dues invoices
    (This excludes any members who have joined recently)
  - *Exclude Tags*: Tag created in step 2.2. above
    (This excludes any agents who have made alternate plans to pay their membership dues and avoid late fees.)



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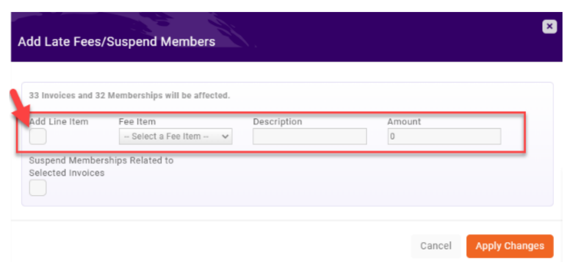
- **Add Late Fees to Selected Invoices**
  Select the fee item you created in step 2.1 above and set the desired price of the late fee. Click *Apply Changes* to add the late fees. Depending on how many invoices you're adding late fees to, this may take a couple of hours.



☐ 2.4 Notify Agents of Late Fees

Memberships> Unpaid tab> Actions> Email Invoices | Print Invoices

Email or Print Invoices with Late Fees

After adding late fees to invoices, you may want to notify your agents that they now owe a late fee. You can quickly email or print those invoices from the Unpaid tab while reusing the same filtering you used to add the late fees.

If you would like to review creating an email template or emailing invoices, review sections 4.2 and 6.2 of the Association Dues Billing Guide.

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3. Suspend, Drop, and Reactivate Agents

☐ 3.1 Configure NRDS, MLS, and Lockbox Integrations

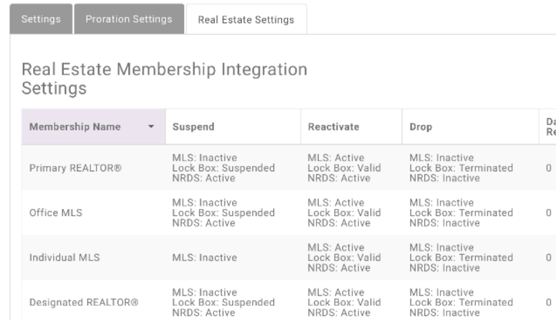
Setup> Memberships, Membership Settings> Real Estate Settings tab

In-app guide available, under the "Need Help?" tab.

Set Access to Integrations on Membership Status Change
These settings control what access an agent will or will not have when their association membership is suspended, dropped, or reactivated. This screen loads the status options for your configured MLS and Lockbox services. Set statuses for suspensions, reactivations, and drops.

WARNING: Most associations should not change an agent's NRDS status to Inactive (I) when they are suspended. Inactive agents cannot reactivate themselves by paying their overdue invoices. You or your staff must process their payments to use your default NRDS ID instead of the agent's NRDS ID.

Configure these settings for all membership types where an agent's or member's access should change when they are suspended, dropped, or reactivated.



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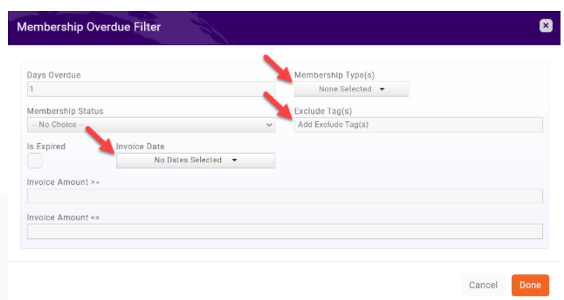
☐ 3.2 Suspend Agents

In-app guide available, under the "Need Help?" tab.

- **3.2.1 Filter Unpaid Invoices to Overdue Association Dues Invoices** *Memberships> Unpaid tab> Customize Results*
  By default, this screen lists all open invoices for membership dues. Filter by membership type, invoice date, and tag so that only the agents who have the correct overdue invoices will be suspended:
  - Membership Types: All association memberships that have local, state, and national dues
    (This excludes any MLS or lockbox fees that may be on a different schedule)
  - Invoice Date: Date used on initial run of association dues invoices
    (This excludes any members who have recently joined)



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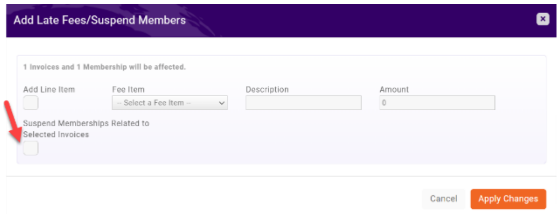
GrowthZone smarter association software

- Exclude Tags: Tag added to prevent an agent from being suspended (Review step 2.2 for more information about excluding contacts by tag)

- **3.2.2 Suspend Agents Associated with Selected Invoices** *Memberships> Unpaid tab> Actions> Add Late Fees/Suspend Members*
  Select Suspend Memberships Related to Selected Invoices. You can also add a late fee/reinstatement fee when suspending members. Depending on how many members you're suspending, this may take a couple of hours.



- **3.2.3 Notify Suspended Agents** *Memberships> Unpaid tab> Actions> Email Invoices | Print Invoices*
  After suspending agents, you may want to notify them that they have lost access to certain services and may owe an additional late fee/reinstatement fee. You can quickly email or print those invoices from the Unpaid tab while reusing the same filtering you used to add the late fees.

  If you would like to review creating an email template or emailing invoices, review sections 4.2 and 6.2 of the Association Dues Billing Guide.

☐ 3.3 Reactivate Agents

Suspended agents or members can reactivate themselves by paying all open invoices with membership dues-type fee items. No staff action is needed to reactivate a member. GrowthZone will reactivate the member immediately once all required invoices have been paid but integrated MLS and lockbox services can take up to 90 minutes to receive and process status changes.

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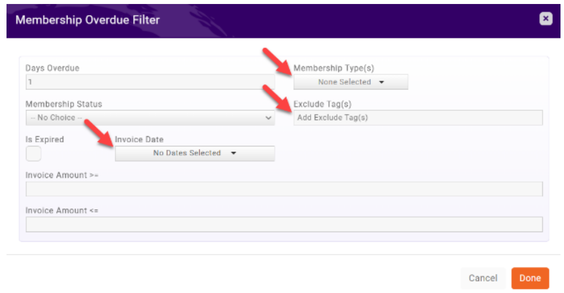
3.4 Drop Agents

In-app guide available, under the "Need Help?" tab.

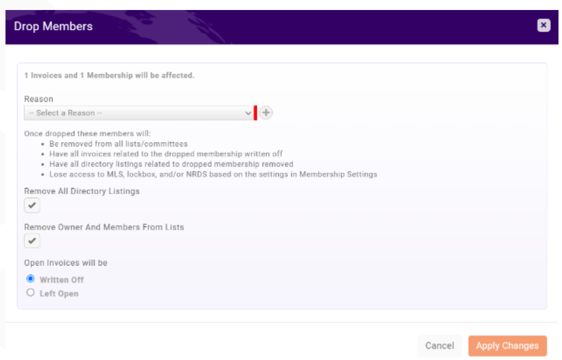
- **3.4.1 Filter Unpaid Invoices to Overdue Association Dues Invoices** *Memberships> Unpaid tab> Customize Results*
  By default, this screen lists all open invoices for membership dues. Filter by membership type, invoice date, and tag so that only the agents who have the correct overdue invoices will be dropped:
  - Membership Types: All association memberships that have local, state, and national dues
    (This excludes any MLS or lockbox fees that may be on a different schedule)
  - Invoice Date: Date used on initial run of association dues invoices
    (This excludes any members who have recently joined)
  - Exclude Tags: Tags added to prevent an agent from being dropped
    (Review step 2.2 for more information about excluding contacts by tag)



Notes/Questions:

- **3.4.2 Notify Dropped Agents** *Memberships> Unpaid tab> Actions> Email Invoices | Print Invoices*
  Before dropping agents, you may want to notify them that they are no longer a member of your association and are no longer a REALTOR®. **It's important to do this step before dropping the member** because if you write off the invoices you will no longer be able to email or print the invoices from this tab.
  If you would like to review creating an email template or emailing invoices, review sections 4.2 and 6.2 of the Association Dues Billing Guide.

- **3.4.3 Suspend Agents Associated with Selected Invoices**
  Memberships> Unpaid tab> Actions> Drop Members
  This screen walks through options for removing a variety of benefits from dropped agents. The most important option is whether to leave unpaid invoices open or to write them off. GrowthZone suggests writing off the open invoices to keep your accounting records clear and to avoid confusion if the agent rejoins in the future. Depending on how many members you're dropping, this may take a couple of hours.



4. Suspend and Reactivate Offices

If a broker doesn't pay their dues and is no longer a REALTOR® who can be responsible for the agents in their office you may need to suspend their entire office or offices.

☐ 4.1 Configure NRDS, MLS, and Lockbox Integrations

Setup> Memberships, Membership Settings> Real Estate Settings tab

This feature uses the same configuration as section 3.1 above. Follow those steps for every membership type that should lose access to integrated services if a broker is suspended.

In-app guide available, under the "Need Help?" tab. Please refer to section 3.1 (as this effort is a duplicate of that step.)

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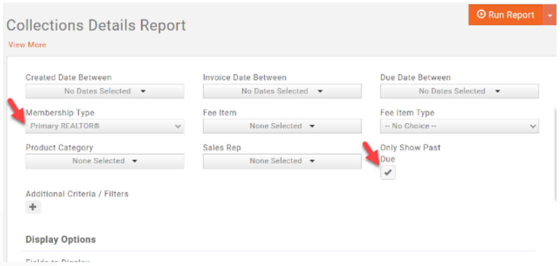
☐ 4.2 Identify and Notify Overdue Brokers

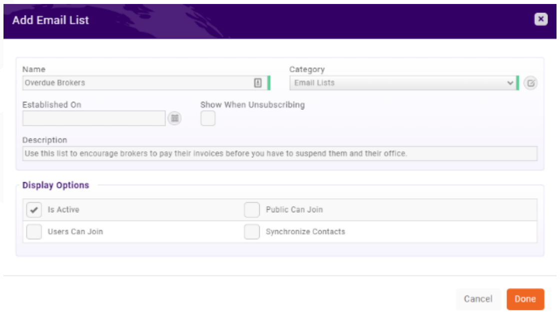
Suspending an office is disruptive to many agents. This report will help you identify overdue brokers and communicate with them before you have to take serious action.

In-app guide available, under the "Need Help?" tab.

- **4.2.1 Save Report on Overdue Brokers**
  Reports> Collections Detail Report
  - Filter the report to all membership types owned by brokers. Enable the Only Show Past Due checkbox to eliminate any recently joined brokers.
  - Save the report by clicking on the down arrow next to the Run Report button and selecting *Save As New Report*.



- **4.2.2 Create Email List for Overdue Brokers**
  Lists/Committees
  - Create a new email list for overdue brokers by clicking on Actions and selecting *Add Email List*. Enter a name and select a Category. Deselect *Show When Unsubscribing* so that brokers cannot accidentally remove themselves from this email list. You don't have to worry about



spam rules for these emails since these messages are related to your business relationship with the broker. Click *Done* to create the list.

- Click on the name of your new list and on the *General* tab, go to the *Synchronize Nightly with Report* field and select the name of the report you created in step 4.2.1. Click Save in the top right of the page to save your changes.

Use this email list to send emails and encourage brokers to pay their invoices before you have to suspend them and their office. This list will refresh every night with a list of brokers who have outstanding association dues invoices. As brokers pay their invoices they will be removed.

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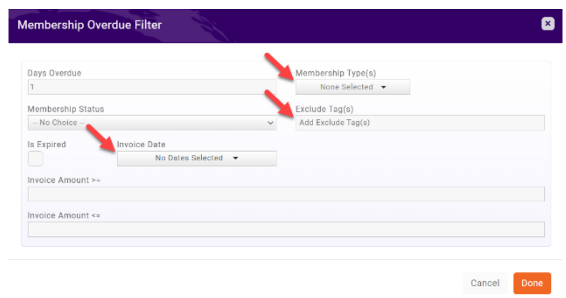
☐ 4.3 Suspend Offices

In-app guide available, under the "Need Help?" tab.

- **4.3.1 Filter Unpaid Invoices to Overdue Broker Invoices** *Memberships> Unpaid tab> Customize Results*
  By default, this screen lists all open invoices for membership dues. Filter by membership type, invoice date, and tag so that only the agents who have the correct overdue invoices will be dropped:
  - Membership Types: All broker memberships that have local, state, and national dues
  - Invoice Date: Date used on initial run of association dues invoices
    (This excludes any brokers who have recently joined)
  - Exclude Tags: Tags added to prevent a broker from being dropped
    (Review step 2.2 for more information about excluding contacts by tag)



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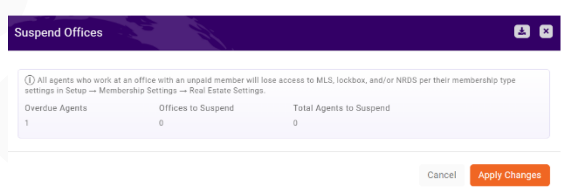
- **4.3.2 Suspend Offices**
  Memberships> Unpaid tab> Actions> Suspend Offices
  Review the listed number of agents and offices that will be suspended to confirm that the number is as you expect. Click *Apply Changes* to suspend all agents at the affected offices. For every agent in an affected office, the system will apply the service access changes for all membership types defined in step 4.1. Depending on the number of offices you're suspending this may take several hours.



4.4. Reactivate Offices

GrowthZone does not automatically reactivate offices when brokers pay all of their overdue invoices. Because every situation with an overdue broker is different, this section will guide you through creating a report so that you and your staff can monitor when a broker makes a payment and then reactivate the suspended office.

In-app guide available, under the "Need Help?" tab.

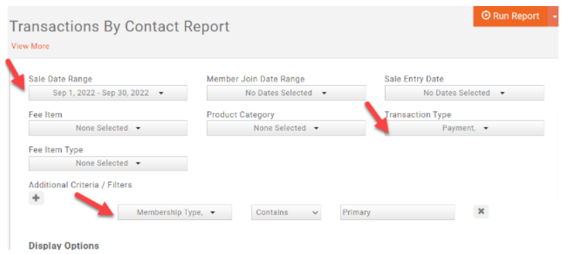
- **4.4.1 Report of Broker Payments**

  Reports> Transactions by Contact Report

  Configure the following filters on the report to filter to payments by brokers:

  - Sale Date Range: Today's date through the date where your association will drop all unpaid members
  - Transaction Type: Payment
  - Additional Criteria: Add a filter by Membership Type Contains. (Pick a word that's used in all of your broker membership type names. Examples: Primary, Designated, etc…)

  Save the report and run it daily to check for payments by brokers. When you see a payment from a broker, click on their name and review their open invoices on the *Contacts> Billing tab* to see if they have paid all required invoices.



Notes/Questions:

- **4.4.2 Reactivate Offices**

  Contacts> Lightning Actions Button

  When a broker has satisfied all of your association's requirements to be reactivated, choose *Reactivate Office* from this actions menu. If you have suspended multiple offices for the broker, reactivate the parent office to also reactivate any branch offices. GrowthZone will reactivate the agents in the suspended offices immediately, but integrated MLS and lockbox services can take up to 90 minutes to receive and process status changes.