

# Managing Dues Invoicing

# Agenda

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- Understanding Recurring Billing
- Best Practices
- Generate Renewal Invoices
- Deliver Renewal Invoices

# Understanding Recurring Billing

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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
- How they wish to receive their invoice

# Understanding Recurring Billing

Who needs to be billed...


- GrowthZone relies on the Recurring Fee schedule on a members Billing tab to identify who needs to be billed
- All members who must be billed for membership dues should have a scheduled billing, which is **automatically generated** when a membership is added to a contact (either through the back office, or via the Membership Application)

| Scheduled Billing  |            |              |           |          |          |                 |            |                |          |
|---|------------|--------------|-----------|----------|----------|-----------------|------------|----------------|----------|
| Description   | Membership | Bill Contact | Frequency | Amount   | Discount | Payment Profile | Start Date | Next Bill Date | End Date |
| <a href="#">National Dues</a>   | Realtor    |              | Annually  | \$116.00 | \$0.00   |                 | 1/21/2021  | 1/21/2022      |          |
| <a href="#">State Membership Dues</a>   | Realtor    |              | Annually  | \$75.00  | \$0.00   |                 | 1/21/2021  | 1/21/2022      |          |
| <a href="#">Association Dues</a>  | Realtor    |              | Annually  | \$50.00  | \$0.00   |                 | 1/21/2021  | 1/21/2022      |          |

# Understanding Recurring Billing

What memberships they need to be billed for...

- The memberships assigned to a member are added on the member's profile tab, then any recurring fees for those memberships will be scheduled on the Member's Billing Tab

| Scheduled Billing  |            |              |           |          |          |                 |            |                |          |
|---|------------|--------------|-----------|----------|----------|-----------------|------------|----------------|----------|
| Description   | Membership | Bill Contact | Frequency | Amount   | Discount | Payment Profile | Start Date | Next Bill Date | End Date |
| <a href="#">National Dues</a>   | Realtor    |              | Annually  | \$116.00 | \$0.00   |                 | 1/21/2021  | 1/21/2022      |          |
| <a href="#">State Membership Dues</a>   | Realtor    |              | Annually  | \$75.00  | \$0.00   |                 | 1/21/2021  | 1/21/2022      |          |
| <a href="#">Association Dues</a>  | Realtor    |              | Annually  | \$50.00  | \$0.00   |                 | 1/21/2021  | 1/21/2022      |          |

# Understanding Recurring Billing

How much they should be billed...

- The system relies on the information defined by the membership type setup, and scheduled on the members Billing tab, to determine how much a member should be billed

| Scheduled Billing                     |            |              |           |          |          |                 |            |                |          |
|---------------------------------------|------------|--------------|-----------|----------|----------|-----------------|------------|----------------|----------|
| Description                           | Membership | Bill Contact | Frequency | Amount   | Discount | Payment Profile | Start Date | Next Bill Date | End Date |
| <a href="#">National Dues</a>         | Realtor    |              | Annually  | \$116.00 | \$0.00   |                 | 1/21/2021  | 1/21/2022      |          |
| <a href="#">State Membership Dues</a> | Realtor    |              | Annually  | \$75.00  | \$0.00   |                 | 1/21/2021  | 1/21/2022      |          |
| <a href="#">Association Dues</a>      | Realtor    |              | Annually  | \$50.00  | \$0.00   |                 | 1/21/2021  | 1/21/2022      |          |

# Understanding Recurring Billing

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When should they be billed...

- When a membership is first added to a contact, the system will look at the membership term and frequency at which a member wishes to be billed to determine a “Next Bill Date”
- For Example: A member joins on 1/1/2021. The membership term is 12 months and the billing frequency is annual. After the initial membership invoice is generated, the system will setup the Scheduled Billing with a next bill date of 1/1/2022

# Best Practices

When adding a membership, validate that the next bill date and fee schedule is correct!

- When adding the membership, you will see the next bill date as the current date – this is correct until you save the membership and an invoice is generated for the new membership.
- Once this invoice has been generated, you will see on the member's Billing tab, the actual next bill date which is derived from the term of the membership and the billing frequency

| Scheduled Billing                     |            |              |           |          |          |                 |            |                |          |
|---------------------------------------|------------|--------------|-----------|----------|----------|-----------------|------------|----------------|----------|
| Description                           | Membership | Bill Contact | Frequency | Amount   | Discount | Payment Profile | Start Date | Next Bill Date | End Date |
| <a href="#">National Dues</a>         | Realtor    |              | Annually  | \$116.00 | \$0.00   |                 | 1/21/2021  | 1/21/2022      |          |
| <a href="#">State Membership Dues</a> | Realtor    |              | Annually  | \$75.00  | \$0.00   |                 | 1/21/2022  | 1/21/2022      |          |
| <a href="#">Association Dues</a>      | Realtor    |              | Annually  | \$50.00  | \$0.00   |                 | 1/21/2021  | 1/21/2022      |          |



# Best Practices

- GrowthZone provides a tool to check that all members have an appropriate next bill date
- KB: [Review Next Bill Dates](#)

First 500 Scheduled Billing Items

| Contact Name ↕         | Membership ↕   | Membership Start Date ↕ | Membership Status ↕ | Current Next Bill Date ↕ | Proposed Next Bill Date ↕ |
|------------------------|--|-------------------------|---------------------|--------------------------|---------------------------|
| Fran's Building Supply | Corporate Membership - Corporate Membership Level 1 1 - 15 employees | 12/11/2019              | Active              | 2/4/2021                 | 1/1/2023                  |
| Ben Bowman             | Realtor  | 12/1/2020               | Active              | 12/1/2021                | 1/1/2023                  |
| Ben Bowman             | Realtor  | 12/1/2020               | Active              | 12/1/2021                | 1/1/2023                  |
| Ben Bowman             | Realtor  | 12/1/2020               | Active              | 12/1/2021                | 1/1/2023                  |
| Jane Jones             | Realtor  | 12/1/2020               | Active              | 12/1/2021                | 1/1/2023                  |
| Jane Jones             | Realtor  | 12/1/2020               | Active              | 12/1/2021                | 1/1/2023                  |

# Review Finance Settings

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## Recommended Default Settings:

- Disable: Disable Run Upcoming Billing/Automated Billing
- Set your logo for invoices & statements
- Disable: Use Automated Billing
- Enable: Invoice before Autopayment, set lead time days to >1
- Disable Allow Partial Payments
- Disable: Show Invoice Creation Date
- Enabled: Use the new My Billing Info tab

# Best Practices

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Ensure all of your active members have a recurring fee schedule...

- Use the Membership Report with Membership Status = Active, and include an additional filter “Scheduled Fee Amount is Empty”
- If a member does not have a schedule, use the Upgrade/Downgrade function to assign a fee schedule


# Best Practices

Ensure that you have accurate Billing Contact Information...

- When you assign a membership, you will also assign the billing contact and contact information (If this is not assigned, the contact information of the membership owner will be used)
- The **Membership Report** can be used to check billing contact information, and the IsMissing operator can be used identify any missing information

Results: 3

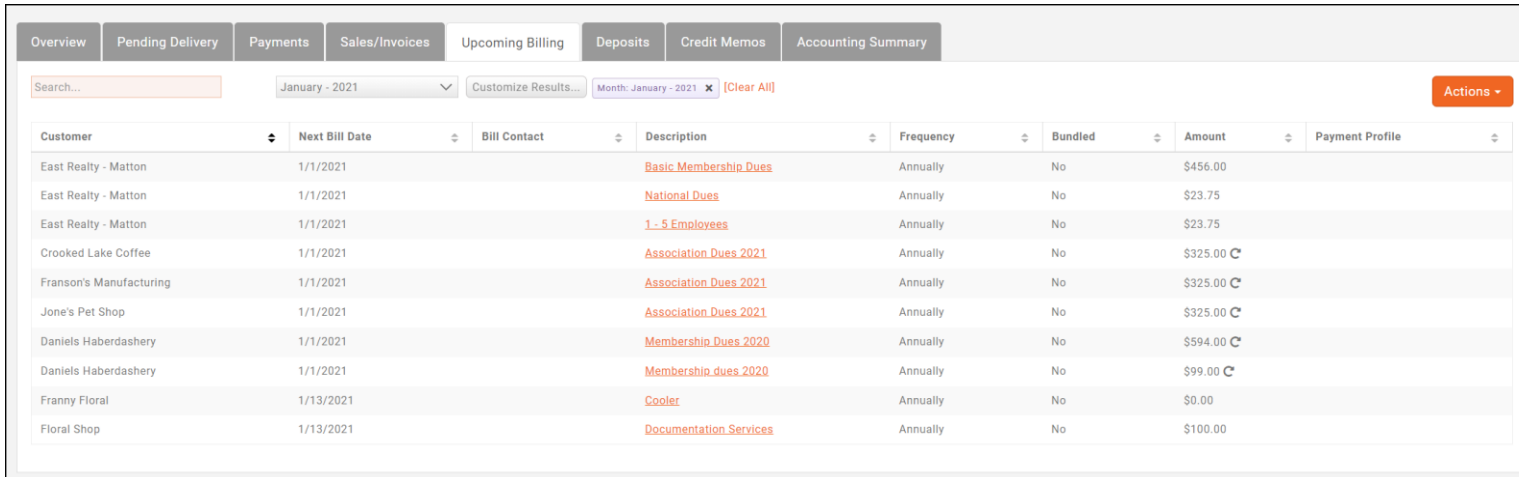
| Contact Name ↕            | Next Bill Date ↕ | Membership Billing Contact ↕ | Membership Billing Contact Email ↕ | Scheduled Billing Amount | Membership ↕                            | Membership Start Date ↕ | Membership Status ↕ |
|---------------------------|------------------|------------------------------|------------------------------------|--------------------------|---|-------------------------|---------------------|
| Linda Stanford            | 6/8/2021         | Linda Stanford               |                                    | \$241.00                 | Realtor                                 | 6/8/2020                | Active              |
| Granson Home Improvements | 6/19/2021        | Laura Gransom                | gransom@mailinator.com             | \$693.00                 | Corporate Package 2020 - 500001 - 75000 | 2/19/2021               | Active              |
| Semple's                  | 6/22/2021        | Semple's                     | cheri.petterson@growthzone.com     | \$1,225.00               | Corporate Membership                    | 6/22/2020               | Active              |
| Count 3                   |                  |                              |                                    |                          |   |                         |                     |



# Best Practices

Only generate renewal invoices from the Upcoming Billing tab in the Billing Module!

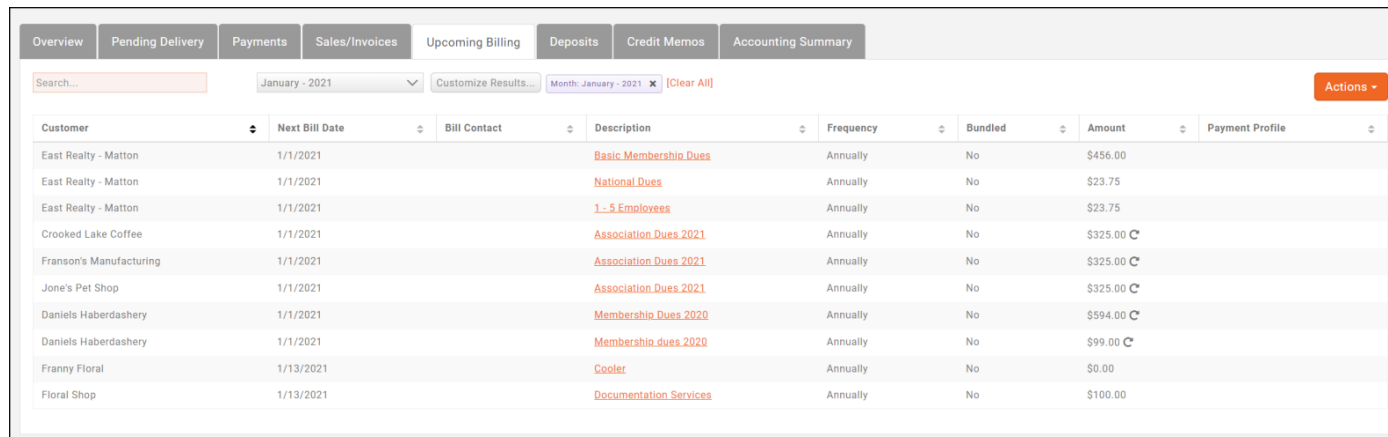
- If invoices are created as one off for memberships vs. from the Upcoming Billing tab, the system will not recognize that you have generated an invoice for the next bill date and will not advance the next bill date, nor will it recognize a renewal activation



| Customer                | Next Bill Date | Bill Contact | Description            | Frequency | Bundled | Amount   | Payment Profile |
|-------------------------|----------------|--------------|------------------------|-----------|---------|----------|-----------------|
| East Realty - Matton    | 1/1/2021       |              | Basic Membership Dues  | Annually  | No      | \$456.00 |                 |
| East Realty - Matton    | 1/1/2021       |              | National Dues          | Annually  | No      | \$23.75  |                 |
| East Realty - Matton    | 1/1/2021       |              | 1 - 5 Employees        | Annually  | No      | \$23.75  |                 |
| Crooked Lake Coffee     | 1/1/2021       |              | Association Dues 2021  | Annually  | No      | \$325.00 | C               |
| Franson's Manufacturing | 1/1/2021       |              | Association Dues 2021  | Annually  | No      | \$325.00 | C               |
| Jone's Pet Shop         | 1/1/2021       |              | Association Dues 2021  | Annually  | No      | \$325.00 | C               |
| Daniels Haberdashery    | 1/1/2021       |              | Membership Dues 2020   | Annually  | No      | \$594.00 | C               |
| Daniels Haberdashery    | 1/1/2021       |              | Membership dues 2020   | Annually  | No      | \$99.00  | C               |
| Franny Floral           | 1/13/2021      |              | Cooler                 | Annually  | No      | \$0.00   |                 |
| Floral Shop             | 1/13/2021      |              | Documentation Services | Annually  | No      | \$100.00 |                 |

# Preparation

- Review your email template, and make any adjustments as needed
- Review your invoice template and make any adjustments as needed. For example, do you need to update the dues deductibility statement on your invoices annually?

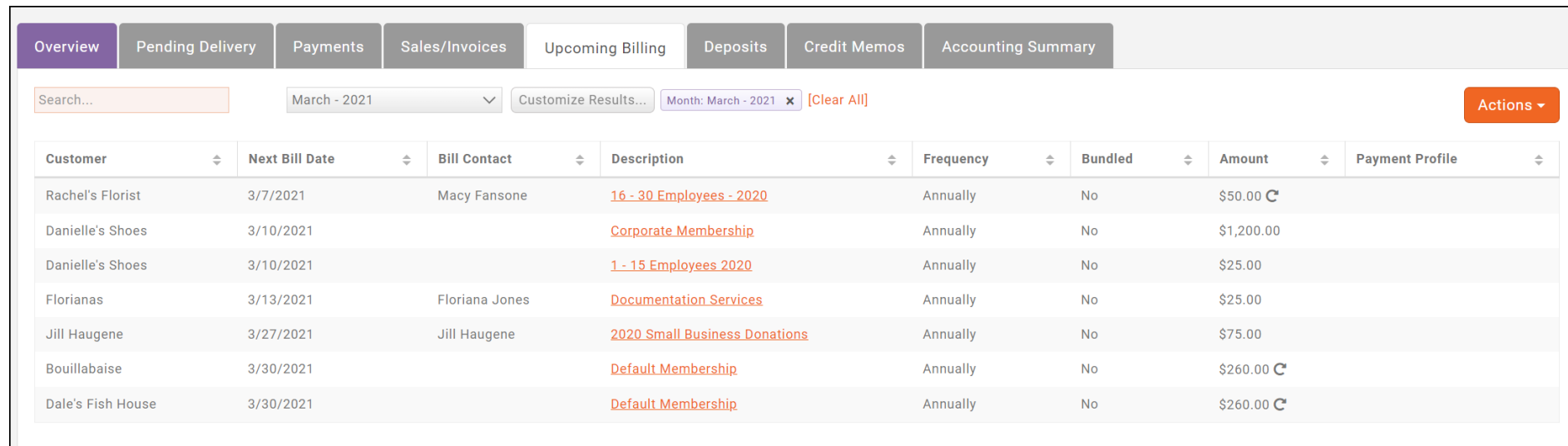


The screenshot displays a software interface for managing association billing. The 'Upcoming Billing' tab is active, showing a table of bills for January 2021. The table includes columns for Customer, Next Bill Date, Bill Contact, Description, Frequency, Bundled status, Amount, and Payment Profile. The data is as follows:

| Customer                | Next Bill Date | Bill Contact | Description            | Frequency | Bundled | Amount     | Payment Profile |
|-------------------------|----------------|--------------|------------------------|-----------|---------|------------|-----------------|
| East Realty - Matton    | 1/1/2021       |              | Basic Membership Dues  | Annually  | No      | \$456.00   |                 |
| East Realty - Matton    | 1/1/2021       |              | National Dues          | Annually  | No      | \$23.75    |                 |
| East Realty - Matton    | 1/1/2021       |              | 1 - 5 Employees        | Annually  | No      | \$23.75    |                 |
| Crooked Lake Coffee     | 1/1/2021       |              | Association Dues 2021  | Annually  | No      | \$325.00 C |                 |
| Franson's Manufacturing | 1/1/2021       |              | Association Dues 2021  | Annually  | No      | \$325.00 C |                 |
| Jone's Pet Shop         | 1/1/2021       |              | Association Dues 2021  | Annually  | No      | \$325.00 C |                 |
| Daniels Haberdashery    | 1/1/2021       |              | Membership Dues 2020   | Annually  | No      | \$594.00 C |                 |
| Daniels Haberdashery    | 1/1/2021       |              | Membership dues 2020   | Annually  | No      | \$99.00 C  |                 |
| Franny Floral           | 1/13/2021      |              | Cooler                 | Annually  | No      | \$0.00     |                 |
| Floral Shop             | 1/13/2021      |              | Documentation Services | Annually  | No      | \$100.00   |                 |

# Run Upcoming Billing

From the Upcoming Billing tab in the Billing Module, you have the ability to filter to those invoices that you wish to generate.



The screenshot displays the 'Upcoming Billing' tab in a software interface. At the top, there are navigation tabs: Overview, Pending Delivery, Payments, Sales/Invoices, Upcoming Billing (selected), Deposits, Credit Memos, and Accounting Summary. Below the tabs is a search bar with the text 'Search...'. To the right of the search bar is a dropdown menu showing 'March - 2021', a 'Customize Results...' button, and a 'Month: March - 2021' filter with a '[Clear All]' link. An 'Actions' button is located in the top right corner. The main content is a table with the following columns: Customer, Next Bill Date, Bill Contact, Description, Frequency, Bundled, Amount, and Payment Profile. The table contains seven rows of data.

| Customer          | Next Bill Date | Bill Contact   | Description                   | Frequency | Bundled | Amount     | Payment Profile |
|-------------------|----------------|----------------|-------------------------------|-----------|---------|------------|-----------------|
| Rachel's Florist  | 3/7/2021       | Macy Fansone   | 16 - 30 Employees - 2020      | Annually  | No      | \$50.00    |                 |
| Danielle's Shoes  | 3/10/2021      |                | Corporate Membership          | Annually  | No      | \$1,200.00 |                 |
| Danielle's Shoes  | 3/10/2021      |                | 1 - 15 Employees 2020         | Annually  | No      | \$25.00    |                 |
| Florianas         | 3/13/2021      | Floriana Jones | Documentation Services        | Annually  | No      | \$25.00    |                 |
| Jill Haugene      | 3/27/2021      | Jill Haugene   | 2020 Small Business Donations | Annually  | No      | \$75.00    |                 |
| Bouillabaise      | 3/30/2021      |                | Default Membership            | Annually  | No      | \$260.00   |                 |
| Dale's Fish House | 3/30/2021      |                | Default Membership            | Annually  | No      | \$260.00   |                 |

# Run Upcoming Billing

When you select the **Run Upcoming Billing** option, you will view a summary of the invoices and number of items that will be billed

- KB: [Run Upcoming Billing](#)

**Run Upcoming Billing** Print Close

Note  
Clicking Run will immediately generate invoices and charge payment profiles. Confirm that the summary information below is correct.

**Invoices to Create**

| Invoices to Create | Scheduled Billing Items | Next Bill Date Range | Value of Invoices |
|--------------------|-------------------------|----------------------|-------------------|
| 6                  | 7                       | 3/7/2021 - 3/30/2021 | \$1,895.00        |

Cancel Run



# 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](#)

You are currently in a staging database. Please note: any changes made to the data in this database will not transfer to your live database.

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

Search... Customize Results... Customize Results... Show Overdue Invoices x [Clear All] Actions

Result Count: 200

| Type    | Date      | Ref # | Customer            | Description                              | Aging | Balance  | Total    | Actions |
|---------|-----------|-------|---------------------|--|-------|----------|----------|---------|
| Invoice | 2/16/2021 | 21    | Zane Daniels        | National Dues                            | 556   | \$440.67 | \$440.67 | Actions |
| Invoice | 2/15/2021 | 20    | Yank Kerson         | National Dues                            | 557   | \$474.83 | \$474.83 | Actions |
| Invoice | 4/14/2021 | 85    | Yank Kerson         | MLS Dues                                 | 499   | \$230.00 | \$230.00 | Actions |
| Invoice | 4/14/2021 | 86    | Yank Kerson         | Event T-Shirt                            | 499   | \$15.00  | \$15.00  | Actions |
| Invoice | 2/15/2021 | 17    | Xavier Jones        | Local Membership Dues - Affiliate        | 557   | \$49.75  | \$49.75  | Actions |
| Invoice | 12/9/2021 | 2520  | Wizard & Associates | Alex Wizard - COEC Training - Class Pass | 260   | \$50.00  | \$50.00  | Actions |

Need Help?

# Questions?