REALTOR® Association
Guide to Running Dues Billing

This document outlines the settings and processes we have tested to ensure that your REALTOR® membership dues billing and dues increases runs smoothly. 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. If you have successfully run billing in the past using different settings and processes, continue to do what works best for you.

In this guide, you'll find the following:

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Terminology Glossary:

- **NAR Image Fee** = Special Assessment for the Consumer Advertising Campaign.
- **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: April 6, 2023

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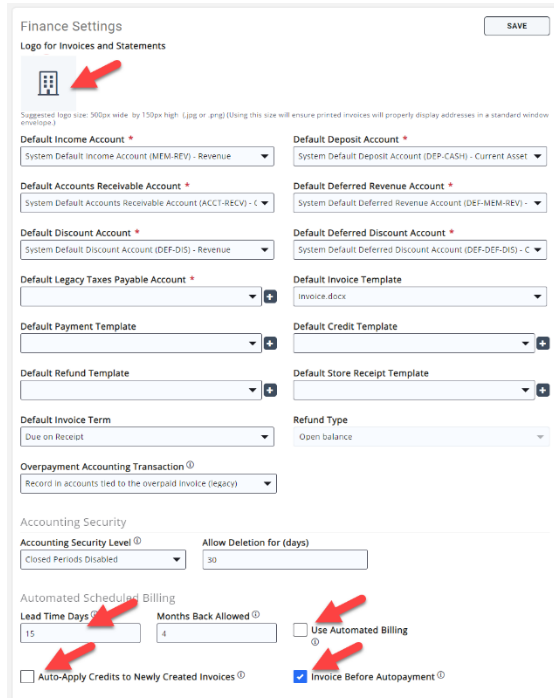
1. System Setup

☐ 1.1 - Finance General Settings *Setup> Finance, General Settings*

These settings enable and disable different features in the system. Since these dues are typically billed once a year, these suggestions favor giving your team control over your billing instead of automating the process.

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



- **Ensure you have a Logo for Invoices and Statements**
  The logo indicated on the Finance General settings is used in the < logo > merge field on your invoice and statement templates. *If you need precise placement and sizing, insert your logo directly onto your invoice template(s) in Setup - Document Generation. Note: In this case, you would need to remove the < logo > merge field from your template.*

- **Disable Automated Billing**
  Automated Billing is useful if you frequently bill your members for a small set of items. As a real estate association, we know that you have a variety of dues and fees billed on a number of different schedules. Automated Billing can make your processes more complicated by requiring you to constantly monitor when your members will receive invoices. When enabled, this feature hides advanced controls to set the invoice date and due date of your dues invoices.

- **Set Lead Time Days to Greater Than Zero**
  This field restricts access to the Invoice Before Autopayment feature when it is set to 0. The exact value of this field only matters if you are using automated billing. Since we're not using that, you can set this to 15 which is a reasonable default value if you choose to use automated billing in the future.

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- **Enable Invoice Before Autopayment**
  With *Invoice Before Autopayment* enabled, invoices indicating that the invoice will be paid by payment profile (on a specific date) will be generated when running your upcoming billing. You can set the date that these automatic charges will happen when generating your membership dues invoices.

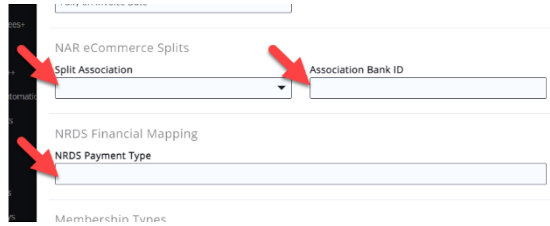
- **Disable Auto-Apply Credits to Newly Created Invoices**
  This should be disabled while creating your REALTOR® dues invoices. If your members have paid for MLS fees in advance, the system will automatically apply those credits to their membership dues invoice. This will partially pay or even close their membership dues invoice and result in two potential issues: a partial payment in NAR eCommerce and a transfer of funds between your MLS and association financial entities. If this feature is valuable for your MLS invoices, you can re-enable after you have delivered your invoices and processed your automatic payments.

☐ 1.2 - Fee Item Settings *Setup> Services, Products and Commerce, Fee Items*

Check the following settings for each fee item used for your association dues. This will include NAR Dues, State Dues, Local Dues, NAR Image Fee, RPAC, etc.

- **Review NAR eCommerce Splits**
  Confirm that money received for this item will be sent to the correct association and Bank ID. For more information on this, [visit our Knowledge Base.]()

- **Ensure your NRDS Financial Record Sync Mapping is Correct**
  Make sure that the correct NAR-defined short code (NATL, STAT, IMAG, RPAC, LOCL) is set . For more information on this, [visit our Knowledge Base]().



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IDEA: Prompt messaging when someone chooses to deselect a voluntary fee. If someone deselects a voluntary payment (such as RPAC) when checking out or setting up autopay, you now have the option to include a confirmation window with a customizable message. This gives your association an ability to share the value of these contributions in the moment and remind them how important this contribution is.

To enable this, go to Setup> Fee Items. For those fees marked as voluntary, you'll see the Require Confirmation checkbox. Once enabled you can customize your message. [View this article for more details]().

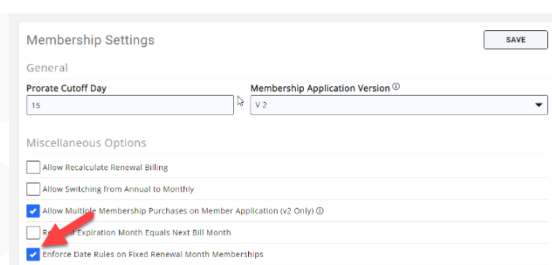
2. Membership Pricing Changes and Configurations

☐ 2.1 - Enforce Date Rules on Fixed Renewal Month Memberships

Setup> Memberships, Membership Settings

This setting prevents you from unintentionally changing the Next Bill Dates for scheduled billing items linked to memberships that renew on a certain date. This will prevent most situations where a member does not receive a membership dues invoice when they should have.

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



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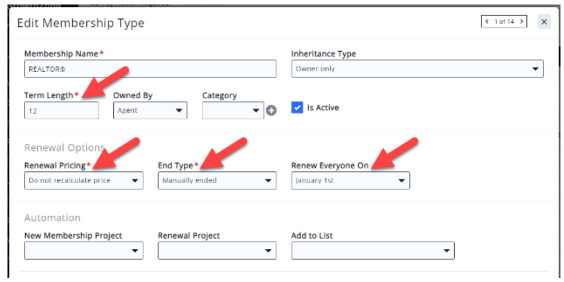
2.2 - Membership Type Settings *Setup> Memberships, Types> Select desired membership name*

Membership Types for association dues should be set to follow the membership year defined by NAR to run from January 1st through the end of the year. Membership Types you use for billing MLS or lockbox fees may be configured differently.

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



- **Term Length Should be 12 Months**
  All association dues membership types should be set to a term length of 12 (months).

- **Renewal Pricing Should be "Do not recalculate price"**
  You may have previously configured your membership types to recalculate. We now have a feature specifically built to make dues increases quick and easy (more information on this, in section 2.3). We strongly suggest setting your membership to "Do not recalculate price" so that you can use this new feature.

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- **End Type Should be Manually Ended**
  GrowthZone can automatically drop members who have not paid for a set number of days after their original invoice date. This may be helpful for your MLS memberships if you bill your members monthly, but we strongly suggest setting your membership to "Manually ended" for association membership types.

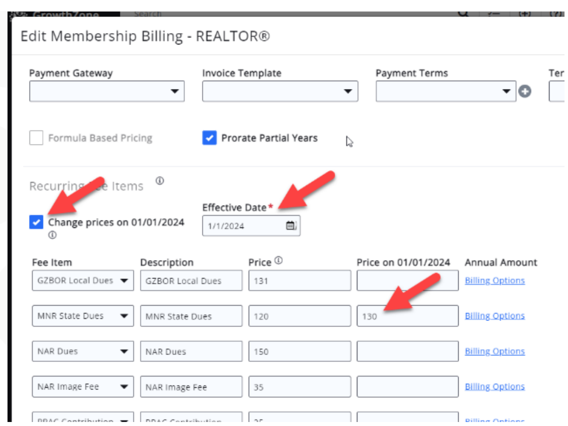
- **Set Renew Everyone on to January 1st**
  This setting helps the system follow the membership year as defined by NAR.

2.3 - Membership Pricing Changes

Setup> Memberships, Types> Select desired membership's price

If your local, state, or other dues are changing for 2024, be sure to review the following instructions. This feature allows you to charge your members a new rate for 2024 dues but continues charging new members the current rate through the end of 2023. Define when to charge the increased fee and have the system automatically bill at that new rate for charges on or after a certain date.

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



To set new prices for a membership, on a certain date:

- Edit the membership type's pricing
- Enable "Change Prices On…"
- Pick your desired date for new pricing to start.
- Enter new prices in the "Price on <Date from step 3>" column. *Note: Leaving a field blank in this column will carry the current price forward.* (If using levels, see note below.)
- Save your changes.

The above steps will need to be completed for each effected membership type.

For those Associations utilizing Levels within Membership Types: You will need to set the "Change Pricing on..." date within the Membership Type pricing screen, and then make the necessary pricing adjustments on the Level(s) itself.

Note: In order to utilize this feature, please ensure:

- *your membership type is set to a specific “renew everyone on” date (noted in section 2.2 of this guide)*
- *Membership recalculation is disabled (noted in section 2.2 of this guide)*
- *Formula based pricing is disabled*

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3. Verifying Your Data

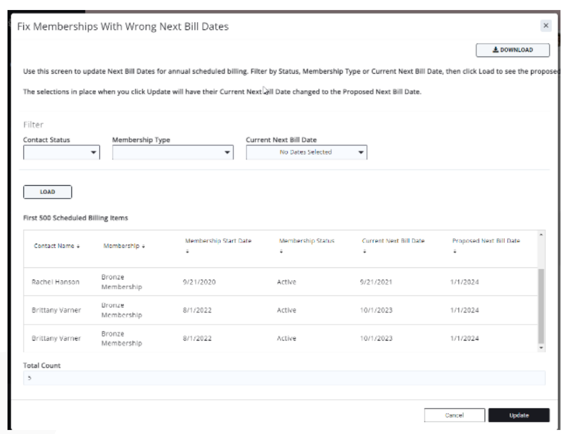
☐ 3.1 Review Next Bill Dates *Setup> Membership, Review Next Bill Dates*

We’ve built a tool to help associations 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. This tool can be a great way to double check that members will be billed/charged on the dates that you expect.

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

To utilize this new tool:

- **Open the Review Next Bill Dates tool**, under Setup.
- **Review those members listed** (if any).
  - *Note: Members listed here, have next bill dates that are not expected. Meaning, the current Next Bill date is different that the “Renews on…” date set on each membership type. Notice the “Current Next Bill Date” and “Proposed Next Bill Date” column.*
- **Filter results** (if needed) by Status, Membership Type, or Current Next Bill Date. Then click “Load” to see the proposed results.
- **Click “Update”** which will kick off a mass change for those filtered results to have their Current Next Bill Date changed to the Proposed Next Bill Date. This will update all scheduled billing with incorrect next bill dates even though only the first 500 are listed. If you have more than 500 listed, use the Download button at the top of the screen to review all scheduled billing items that will be changed.



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☐ 3.2 – Review Reports to Validate Membership Billing *Reports> Search for desired report*

Utilize the reports listed below to confirm that your data is complete and accurate. Verifying this data, while sometimes time consuming, can help catch unintended issues prior to running your billing. Remember to save your reports so that you can easily run them each time you prepare to generate your upcoming billing.

> **TIP:** In most reports, you can add your report results to a list, for an easy way to communicate to those specific members. For example, use the Stored Payment Profiles report to create a list of members with expired credit cards, and email them asking them to update their payment profile in the Info Hub.

- **Confirm All Active Members Have Scheduled Billing**
  Use the Membership Report for verification. See View Report of All Active Members Without Recurring Billing. If the member does not have a scheduled billing use the upgrade/downgrade options to assign a scheduled billing.

- **Confirm All Scheduled Billing is Set for the Correct Amount**
  Use the Membership Report to verify that active memberships have correct scheduled billing amounts. See View Report of Active Members Scheduled Billing Accuracy. If the scheduled billing amounts are not correct, use the adjust membership option to update the schedule.

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- **Confirm Dropped Members Do Not Have Schedule Billing**
  If a dropped or non-member agent or broker has a scheduled membership billing, this is rare, and will require our support team to fix. Use the Membership Report for verification. See View Report of All Dropped/Non-Members With a Recurring Billing.

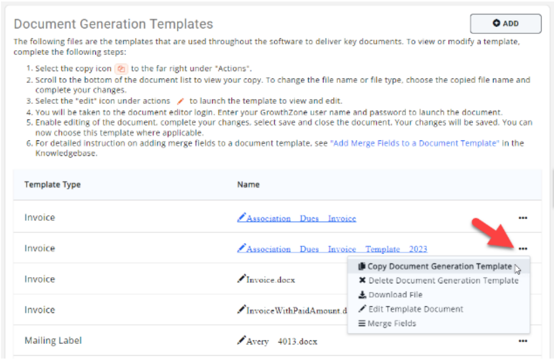
- **Confirm Members Have an Email Address to Receive Their Invoice**
  Use the Membership Report for verification. See View Report of Active Members Missing Billing Contact and Billing Email. If the membership does not have a billing contact and/or address information, use the adjust membership option to assign this information to the membership

- **Check for Expired Payment Profiles**
  Use the Stored Payment Profile report to check expiration dates. If updates are needed contact your members to access the Info Hub to update.

4. Communication and Messaging Review

☐ 4.1 - Review Invoice Template *Setup> Document Generation Templates> edit/copy desired invoice temple*

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. See [View/Modify Invoice Template]() for instructions if you wish to review and update your template.



TIP: Copy an existing invoice template (or create a new template) each year to includes that year's disclaimers, dues deductibility statements, and other required disclosures to keep track of your messaging on each year's invoices.

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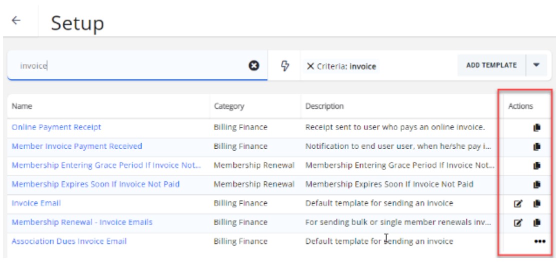
☐ 4.2 - Review Email Template to Send with Invoices

Setup> Email Templates> edit/copy desired email template

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. Using a new email template can help trigger discussions around dues deductibility statements or other policies that you want your members to see both in their dues email and on their invoice document. See [Working with Email Templates]() if you wish to review and update your email templates.

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



TIP: Copy an existing email template (or create a new one) each year to include that year's disclaimers and other messages. This can make it easy to compare differences year over year and re-use as much prior work as possible.

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4.3 - Review Member-Facing Automated Messages *Setup> Email Templates> edit/copy desired template*

The following emails will be sent to members throughout the invoicing and payment process. Review the templates listed below to make sure they accurately describe your association's processes and that they follow your brand standards.

- The **Online Payment Receipt** email template is sent when the system successfully charges a saved credit card or if a member pays an invoice with a credit card.
- The **Recurring Charge Failed** email template is sent if a member has saved a credit card, but eCommerce has an issue charging it.

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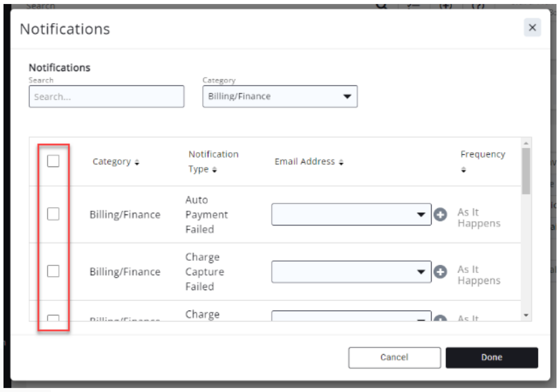
*Note: Whether you've created a new email template or just want to double check which email template will be sent out, **be sure you set the correct email template in the Automated Messages area of setup**. Click here for more information on automated messages.* *In-app guide available, under the "Need Help?" tab.*

4.4 - Ensure Staff Enable Billing Related Notifications *Account Menu (Top, Right) > My Notifications*

Make sure that you and your staff receive the right notifications to keep your billing process running smoothly. Just like an airplane safety video, make sure your notifications are set before assisting the rest of your team with theirs. To modify your notifications, click on your name in the top right of the screen and then click on My Notifications. Easily view all Billing related notifications by setting the Category to "Billing/Finance". Review a few key notifications, listed below.

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



- **Auto Payment Failed** - Sent if eCommerce cannot charge a saved credit card.
- **Charge Capture Failed** - Very rare, this is sent if eCommerce successfully authorizes a charge with a card but cannot capture the payment. (Credit Card Lingo 101: An authorization is sometimes called a "hold" on a credit card and is used to check if a card is valid and if the card can accept a charge for the total amount. A capture is a request to move money from the credit card bank (e.g., Visa) to eCommerce).
- **Duplicate Charge Detected** - Sent if a member tries to pay the same amount twice in a short period of time. There are guardrails in place on the invoice payment page and in the Info Hub to prevent this from occurring, but sometimes members find a way.
- **Failure to Send Receipt** - Sent if a GrowthZone issue prevents a member from receiving a receipt. Members can access receipts from the Info Hub, or you can email the member a receipt from the Contact → Billing tab → Actions button next to the payment.

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5. Run Upcoming Billing

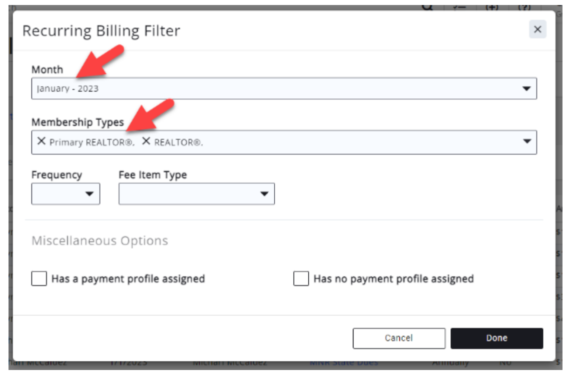
You are now ready to generate your invoices for local, state, national dues as well as the Image Fee, RPAC, and any other donations or dues your association collects. Review the critical steps listed below to get started.

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

5.1 - Filtering Scheduled Billing Items:

Billing > Upcoming Billing tab

Click on the *Customize Results* button to filter to the memberships you want to generate invoices for.



- Set the Month dropdown to *January – 2024*
- Select your Association Membership Type(s) from the Membership dropdown.

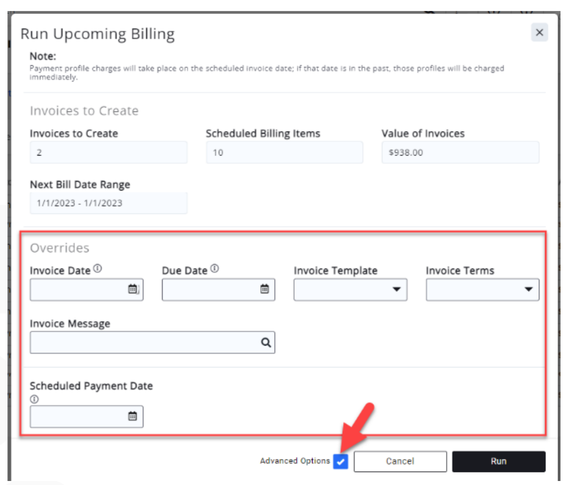
Notes:

- *The system will only generate invoices for the scheduled billing items displayed from your filtering.*
- *If using the "Change Pricing on…" feature (from Section 2.3 of this guide), please know, **on the Upcoming Billing Tab you will still see the old pricing listed in the amount column**. There will be an icon next to the amount indicating that the price will change. The effective date pricing will be used when you run the billing.*

TIP: Start by generating an invoice for just one agent, by searching for them on the Upcoming Billing tab. Running the billing for a small subset allows you to review the invoice prior to running it for all agents.

5.2 – Generate Invoices: *Billing > Upcoming Billing tab*

Click on the Actions button and choose *Run Upcoming Billing*. There are a few fields on this screen you'll want to set:



- Enable the Advanced Options checkbox.
- Set your desired Invoice Date (example: 10/1/2023)
- Set your desired Due Date (example: 11/1/2023)
- Set your desired Scheduled Payment Date (example 11/1/2023) *This is when your members with saved credit cards will be charged for their association dues.*
- Select the Invoice Template you created/reviewed earlier.
- Then, click *Run* to generate your invoices.

For additional instructions and information, visit the Generate Invoices for Upcoming (Recurring) Billing in our Knowledge Base.

Notes/Questions:

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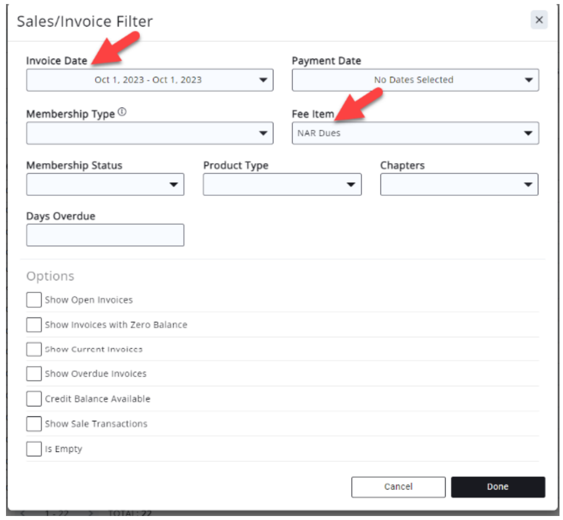
6. Deliver Invoices

Once invoices have been generated, you will be able to deliver the invoices from the Sales/Invoices tab with the Billing module. Members who have saved a credit card to use with dues billing will receive an invoice noting that their credit card will be charged on the Scheduled Payment Date you selected when running billing. All other members will receive a traditional invoice.

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

*Note: We recommend utilizing the Sales/Invoices tab to deliver your invoices. However, if you have previously sent invoices from the Pending Delivery tab, feel free to continue using that process. Just be sure to clear it out the Pending Delivery tab **before** running upcoming billing.*

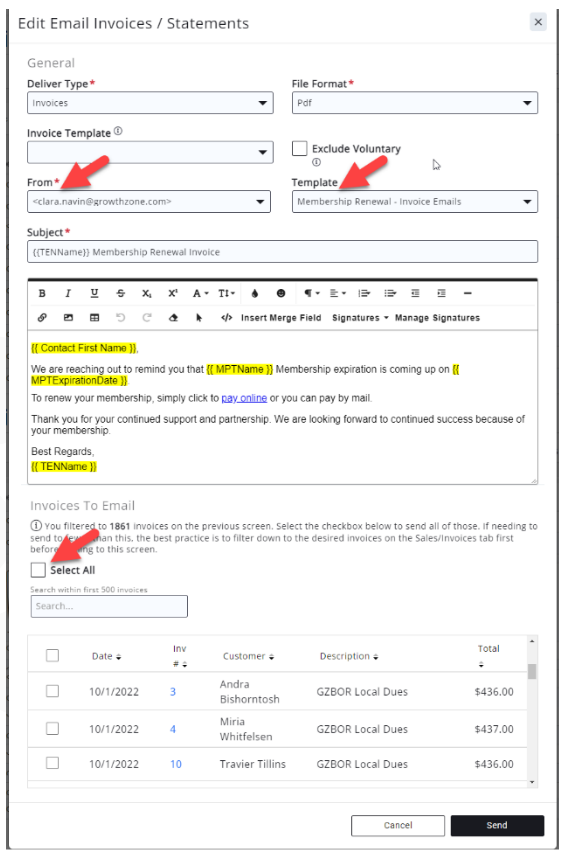


☐ 6.1 - Filter to Select Invoices:

Billing > Sales/Invoices tab

To deliver the newly generated invoices, go to the *Sales/Invoices* tab, and customize your filters to the following:

- Set the Invoice Date to 10/1/2023 (or the date your association desires).
- Set the Fee Item to be your NAR Dues (or the name your association uses for national dues fees). This will include all invoices that are charging members for national dues and, more broadly, all association dues invoices.



☐ 6.2 - Email Invoices:

Billing > Sales/Invoices tab

After filtering the invoices, prepare to send them by clicking on Actions, and selecting *Email Invoices/Statements*.

- Set the *Template* field to the email template you previously created.
- Set the *From* email address where you would like to receive billing questions or notices about bounced emails from this round of invoices.
- Check *Select All* to send all membership dues invoices (if shown). **Critical if handling more than 500 invoices.** This ensures that all of your members receive their invoice at the same time.
- Review the message to make sure everything looks correct.
- Click *Send* to email your invoices.

Notes/Questions:

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Resources For After You Run Your Billing

Check out our REALTOR® Association Post-Billing Guide for more information on late fees, suspensions, drops and more.