

GrowthZone Classroom Training: Managing Unpaid Dues

IDENTIFY OVERDUE MEMBERSHIP INVOICES

Identify & Resend Overdue Invoices

Using the Sales/Invoices tab you will be able to review and resend overdue invoices

KB: [Redeliver Past Due Invoices](#)

Type	Date	Ref #	Customer	Description	Aging	Balance	Total	Actions
Invoice	8/11/2022	1600	Cheri Petterson	Small Business Donations	356	\$200.00	\$200.00	...
Invoice	11/13/2021	1001	Cheri Petterson	Small Business Donations	709	\$200.00	\$200.00	...
Invoice	3/27/2021	914	Jill Haugene	2020 Small Business Donations	940	\$75.00	\$75.00	...
Invoice	11/13/2020	684	Cheri Petterson	Small Business Donations	1074	\$200.00	\$200.00	...
Invoice	10/22/2020	607	Cheri Petterson	Presidential Scholarship Fund	1096	\$100.00	\$100.00	...

Identify & Resend Overdue Invoices

eMail communications

1-15 Days Past Due

Be friendly and polite. Your aim is to maintain your relationship with your member while also gently reminding them of their debt.

30-60 Days Past Due

Stay professional but be firm and demonstrate the urgency of paying the invoice. At this point, the invoice is very overdue and you shouldn't be afraid to say so.

90+ Days Past Due

The longer a client doesn't pay an invoice, the less likely they'll pay at all. After 90 days, it's time to send a collections letter.

APPLY LATE FEES

Apply Late Fees

Late fees are added to unpaid invoices and 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.

Note: the fee item **MUST** be set up using the “Late Fee” type.

Article: [Set Up Standard Fee Items](#)

Edit Fee Item < 61 of 85 > ✕

Note: Changes made to a Fee Item will take effect on new transactions going forward and do not affect any existing transactions.

DEACTIVATE FEE ITEM

Name *
Late Fee

Product Category *
General

Description *
General Late Fee

Product Description

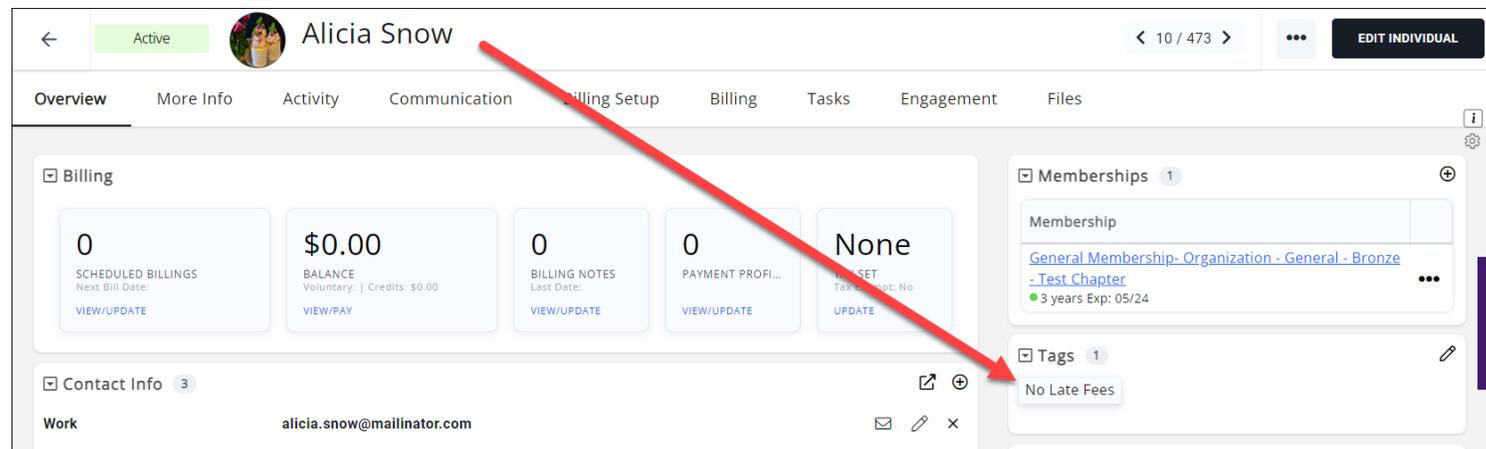
Fee Item Type *
Late Fee

- Sponsorship
- Add-on
- Digital Product
- Donation/Contribution
- Educational Registration
- Event Sponsorship
- Event No-show Fee
- Event Registration
- Fund
- List/Committee
- Initiation Setup Charge
- Late Fee**
- Membership dues
- Miscellaneous
- Non-Dues
- PAC
- Physical Product
- Professional Service
- Program
- Surcharge

Apply Late Fees

Define Tag to Exclude Members 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 members from receiving a late fee (or suspension) is to apply a tag to their contact. You can exclude these members when filtering the list of invoices to receive late fees.



The screenshot displays the profile of a member named Alicia Snow. The interface includes a navigation bar with tabs for Overview, More Info, Activity, Communication, Billing Setup, Billing, Tasks, Engagement, and Files. The main content area is divided into several sections: Billing, Memberships, and Tags. The Billing section shows 0 scheduled billings, a balance of \$0.00, 0 billing notes, 0 payment profiles, and a tax rate of None. The Memberships section shows one membership: General Membership- Organization - General - Bronze - Test Chapter, with a 3-year term and an expiration date of 05/24. The Tags section shows one tag: No Late Fees. A red arrow points from the 'No Late Fees' tag to the 'EDIT INDIVIDUAL' button in the top right corner.

Article: [Manage Tags](#)

Apply Late Fees

Filter Unpaid tab to Overdue 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 Overdue Filter ✕

Days Overdue Membership Type(s) Level

Membership Status Exclude Tag(s)

Is Expired Invoice Date

Invoice Amount >= Invoice Amount <=

Apply Late Fees

Add Late Fees to Selected Invoices

Select the fee item you created 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.

Add Late Fees/Suspend Members ×

265 Invoices and 73 Memberships will be affected.

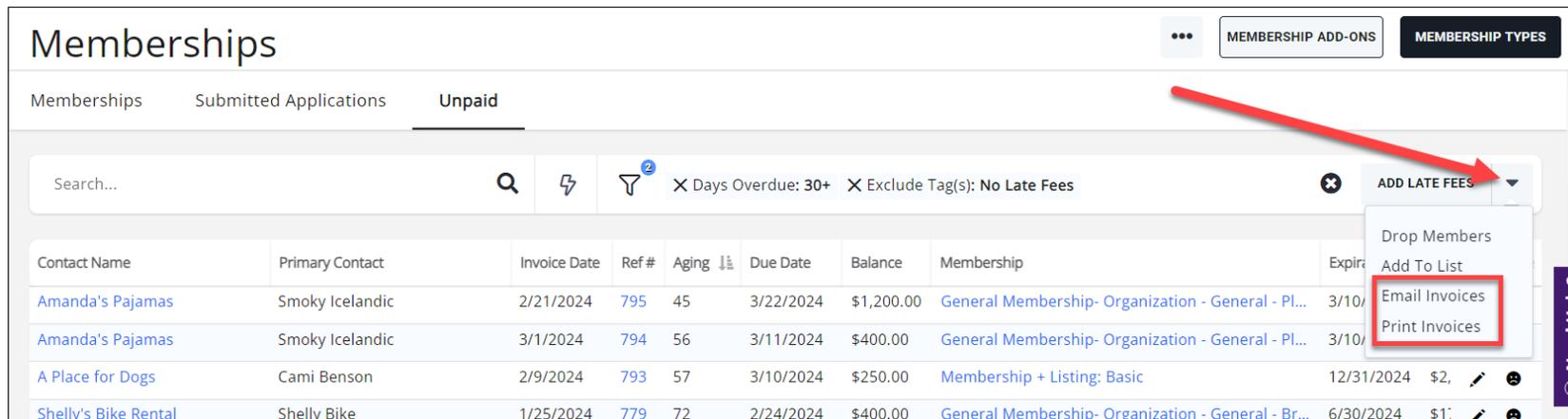
Fee Item*	Description	Amount*
Late Fee	General Late Fee	10

Article: [Add Late Fees to Overdue Membership Invoices in Bulk](#)

Apply Late Fees

Email or Print Invoices with Late Fees

After adding late fees to invoices, you may want to notify your members 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.



The screenshot shows the 'Memberships' interface with the 'Unpaid' tab selected. A red arrow points to the 'ADD LATE FEES' button, which has a dropdown menu open showing options like 'Email Invoices' and 'Print Invoices'. The table below shows a list of memberships with columns for Contact Name, Primary Contact, Invoice Date, Ref #, Aging, Due Date, Balance, and Membership.

Contact Name	Primary Contact	Invoice Date	Ref #	Aging	Due Date	Balance	Membership	Expires
Amanda's Pajamas	Smoky Icelandic	2/21/2024	795	45	3/22/2024	\$1,200.00	General Membership- Organization - General - Pl...	3/10/2024
Amanda's Pajamas	Smoky Icelandic	3/1/2024	794	56	3/11/2024	\$400.00	General Membership- Organization - General - Pl...	3/10/2024
A Place for Dogs	Cami Benson	2/9/2024	793	57	3/10/2024	\$250.00	Membership + Listing: Basic	12/31/2024 \$2,
Shelly's Bike Rental	Shelly Bike	1/25/2024	779	72	2/24/2024	\$400.00	General Membership- Organization - General - Br...	6/30/2024 \$1:

MASS DROP OVERDUE MEMBERS

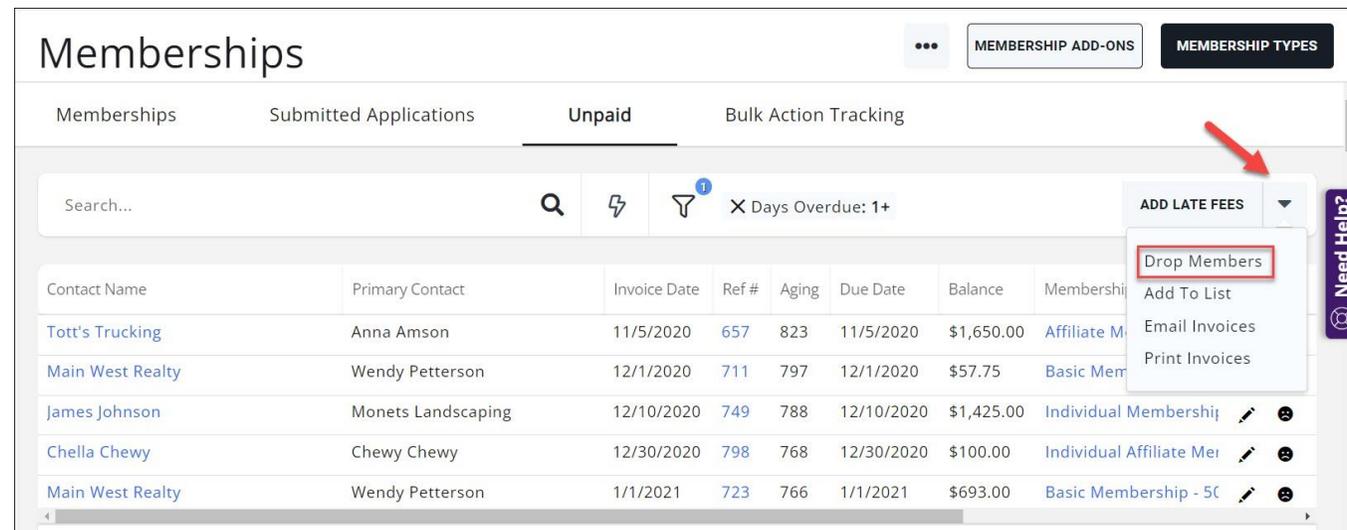
Mass Drop Overdue Members

Drop unpaid members when you no longer expect to collect their dues from them and are ending your collection process. Once dropped, a former member can be reactivated by staff or they can fill out your membership application again.

Mass Drop Overdue Members

In the Memberships module select the **Unpaid** tab and filter as needed using the *Quick Filter* or *Customize Filter* options.

When the unpaid memberships are filtered to your satisfaction, use the arrow next to the Add Late Fee button to select **Drop Members**.



The screenshot displays the 'Memberships' module interface. At the top, there are tabs for 'Memberships', 'Submitted Applications', 'Unpaid', and 'Bulk Action Tracking'. The 'Unpaid' tab is selected. Below the tabs is a search bar and a filter icon. A dropdown menu is open next to the 'ADD LATE FEES' button, showing options: 'Drop Members', 'Add To List', 'Email Invoices', and 'Print Invoices'. A red arrow points to the 'Drop Members' option. The table below shows a list of memberships with columns for Contact Name, Primary Contact, Invoice Date, Ref #, Aging, Due Date, Balance, and Membership Type.

Contact Name	Primary Contact	Invoice Date	Ref #	Aging	Due Date	Balance	Membership
Tott's Trucking	Anna Amson	11/5/2020	657	823	11/5/2020	\$1,650.00	Affiliate M
Main West Realty	Wendy Petterson	12/1/2020	711	797	12/1/2020	\$57.75	Basic Mem
James Johnson	Monets Landscaping	12/10/2020	749	788	12/10/2020	\$1,425.00	Individual Membershij
Chella Chewy	Chewy Chewy	12/30/2020	798	768	12/30/2020	\$100.00	Individual Affiliate Mer
Main West Realty	Wendy Petterson	1/1/2021	723	766	1/1/2021	\$693.00	Basic Membership - 5C

Mass Drop Overdue Members

Drop Members ✕

190 Invoices and 136 Memberships will be affected.

Reason*

Once dropped these members will:

- Have Info Hub access set to "User - None" from Membership Settings
- Be removed from all lists/committees
- Have all invoices related to the dropped membership written off
- Have all directory listings related to dropped membership removed
- Lose access to MLS, lockbox, and/or NRDS based on the settings in Membership Settings

Remove All Directory Listings

Drop All Memberships for Members

Remove Owner and Members From Lists

Open Invoices will be

Written Off

Left Open

Review the number of members that will be dropped. Totals are generated from the unpaid list as you have it filtered.

Once dropped these members will be fully updated with the selections you chose. The access level given to individuals will be the access level you defined in your Membership Settings.

THANK YOU!!!