

MANAGING RENEWALS

Renewal Settings

Understanding Recurring Billing

Which members need to be billed

- Recurring Fee Schedule

What membership(s) they should be billed for

How much they should be billed

- Membership Type setup

When they should be billed

- Next Bill Date determined by membership term and frequency

How they wish to receive their invoice

The screenshot displays the GrowthZone Chamber Edition interface for a member profile named 'Anthony's on Main'. The left sidebar contains a navigation menu with options like Dashboard, Contacts, Memberships, Billing, Events, Reports, Communication, Lists/Committees, Cloud, Sales Funnel, Marketing Automation, Projects/Tasks, Web Content, Store, Sponsors/Ads, Forms/Surveys, and Chapters. The main content area shows the 'Billing' section for this member. It includes a 'Billing Notes' table (currently empty), a 'Membership Scheduled Billing' table (highlighted with a red box) containing one entry for 'Small Business' membership, and an 'Other Scheduled Billing' table (currently empty). The 'Membership Scheduled Billing' table has columns for Membership, Bill Contact, Frequency, Amount, Discount, Payment Profile, and Start Date.

Membership	Bill Contact	Frequency	Amount	Discount	Payment Profile	Start Date
Small Business	Anthony Mane	Annually	\$1,700.00	\$0.00		5/8/2023

Recommended Default Settings

Set your logo for invoices & statements

Disable: Use Automated Billing

Enable: Invoice before Autopayment, set lead time days to >1

Disable: Auto-Apply Credits to Newly Created Invoices

Disable: Allow Partial Payments

The screenshot displays the 'Setup' page in the GrowthZone Chamber Edition interface. The left sidebar contains a navigation menu with options: Dashboard, Contacts, Memberships, Billing, Events, Reports, Communication, Lists/Committees, Cloud, Sales Funnel, Marketing Automation, Projects/Tasks, Web Content, and Store. The main content area is titled 'Setup' and features a search bar at the top. Below the search bar, the 'Automated Scheduled Billing' section is highlighted with a red box. This section includes input fields for 'Lead Time Days' (set to 1) and 'Months Back Allowed' (set to 4). There are three checkboxes: 'Use Automated Billing' (unchecked), 'Auto-Apply Credits to Newly Created Invoices' (unchecked), and 'Invoice Before Autopayment' (unchecked). The 'Automatic Invoice Emails' section has an 'Enable Automatic Invoice Emails' checkbox (unchecked). The 'Email Template' section shows a dropdown menu set to 'Invoice Email'. The 'Track and record event invoices/payments under the:' section has two options: 'Individual' (checked) and 'Business' (unchecked). A vertical 'Need Help?' button is located on the right side of the page.

Data Verification

Best Practices: Next Bill Date

After activating membership, validate billing schedule and Next Bill Date

Review Next Bill Dates tool

- Check all members have appropriate next bill date
- Correct Next Bill Dates directly within the tool

Fix Memberships With Wrong Next Bill Dates

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DOWNLOAD

Use this screen to update Next Bill Dates for annual scheduled billing. Filter by Status, Membership Type or Current Next Bill

The selections in place when you click Update will have their Current Next Bill Date changed to the Proposed Next Bill Date.

Filter

Contact StatusMembership TypeCurrent Next Bill Date

No Dates Selected

LOAD

First 500 Scheduled Billing Items

Contact Name	Membership	Membership Start Date	Membership Status	Current Next Bill Date	Proposed Next Bill Date
Big Foot Shoe Shop	Small Business	5/8/2023	Active	8/1/2023	1/1/2024

Total Count

1

CancelUpdate

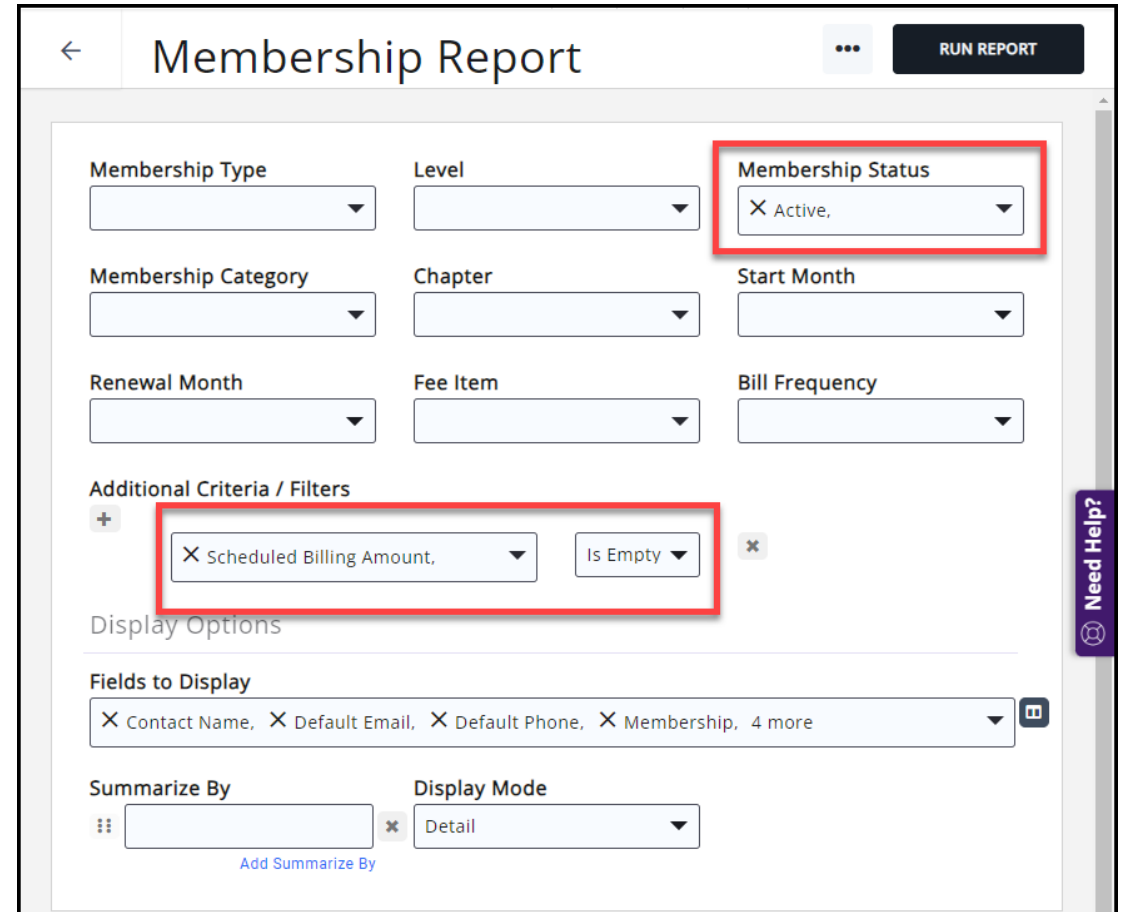
Best Practices: Recurring Fee Schedule

Ensure active members have recurring fee schedule

- Membership Report
 - Include active members
 - Include “Scheduled Fee Amount is Empty” additional filter

Members without fee schedule

- Add fee schedule
 - Use Upgrade/Downgrade function to assign fee schedule



The screenshot shows the 'Membership Report' interface. At the top right, there is a 'RUN REPORT' button. The main area contains several filter sections. The 'Membership Status' filter is highlighted with a red box and set to 'X Active'. The 'Additional Criteria / Filters' section is also highlighted with a red box and contains two filters: 'X Scheduled Billing Amount.' and 'Is Empty'. Below this, the 'Fields to Display' section shows a list of fields: 'X Contact Name, X Default Email, X Default Phone, X Membership, 4 more'. At the bottom, the 'Summarize By' section has a dropdown menu and a 'Detail' button, and the 'Display Mode' section has a dropdown menu set to 'Detail'. A vertical 'Need Help?' button is on the right side.

Best Practices: Accurate Billing Contact Info

Assign Billing Contact during membership activation process

- Contact owner information used if Billing Contact not designated
- Billing contact can be changed

Accurate Billing Contact information ensures successful delivery of renewal invoices

Membership Report

- Can be used to check billing contact information

Add Membership

Details

Business/Individual* [] Type* [] Level [] Term [0]

Chapter [] ☐ Courtesy

Sales Rep [] Join Reason [] Referred By Contact []

Recurring Fee Items

Frequency* [Annually] Next Bill Date* [] Membership Start Date []

Fee Item	Description	Price	Tax	Total	Discount	Amount	Hide
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Recurring Once Per Term Fee Items

Fee Item	Description	Price	Tax	Discount	Amount	Next Bill Date	Hide
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One Time Fee Items

Fee Item	Description	Price	Tax	Amount	Discount	Next Bill Date	Hide
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Invoice Options

☐ Print ☒ Email [] [] []

Invoice Terms

Due on Receipt [] Invoice Message []

Membership Dates

Expiration* []

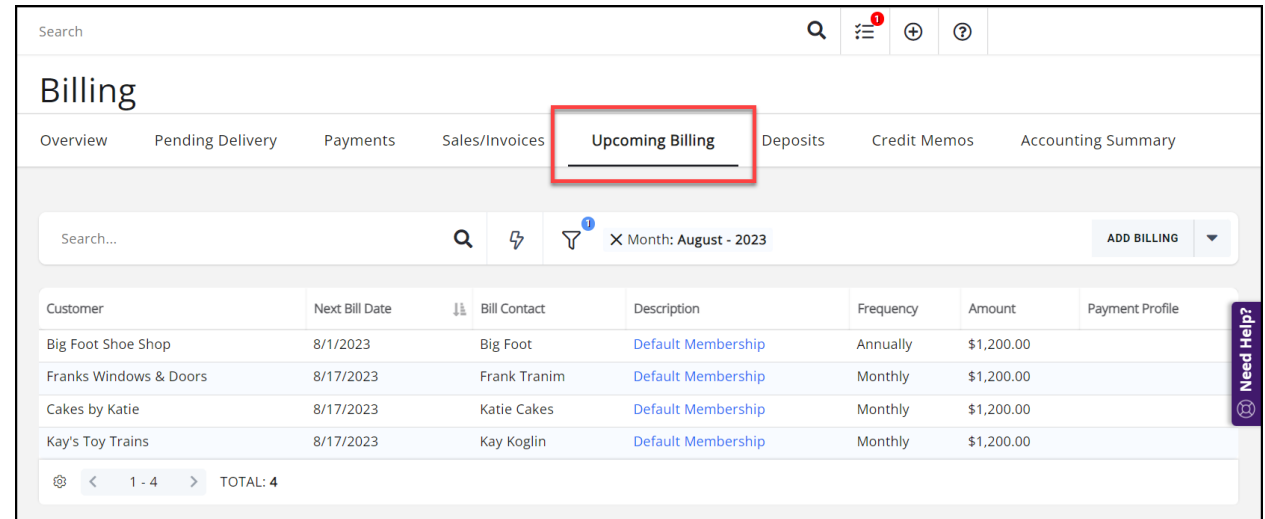
Advanced Options ☐ Cancel Done

Best Practices: Upcoming Billing Tab

Generate renewal invoices from Upcoming Billing tab

Creating individual invoice for membership dues not recommended

- System will not advance the Next Bill Date
- System will not recognize a renewal activation



Customer	Next Bill Date	Bill Contact	Description	Frequency	Amount	Payment Profile
Big Foot Shoe Shop	8/1/2023	Big Foot	Default Membership	Annually	\$1,200.00	
Franks Windows & Doors	8/17/2023	Frank Tranim	Default Membership	Monthly	\$1,200.00	
Cakes by Katie	8/17/2023	Katie Cakes	Default Membership	Monthly	\$1,200.00	
Kay's Toy Trains	8/17/2023	Kay Koglin	Default Membership	Monthly	\$1,200.00	

Generate & Deliver Invoices

Preparation

Review email templates

- Adjust as needed
- Use predefined template, modify to suit your needs

Review invoice template and make any adjustments as needed

- For example, do you need to update the dues deductibility statement on your invoices annually?

Dear Anthony,

We are reaching out to remind you that Membership expiration is coming up on .

Your continued commitment to the Chamber enables us to:

- Stimulate the local economy through programs, events, and services.
- Spotlight businesses and gain visibility for our community.
- Provide timely communications about issues that impact local businesses.
- Provide resources such as online job postings, an expanded web presence through the membership directory, and digital advertising opportunities.

To renew your membership, simply click to [pay online](#) or you can pay by mail.

Thank you for your continued support and partnership. We are looking forward to continued success because of your membership.

Best Regards,

Elizabeth's Sandbox

(123) 456-7890

kalamazoochamber@mailinator.com



Run Upcoming Billing

Upcoming Billing tab

- Filter to those invoices you wish to generate

Run Upcoming Billing option

- Displays summary of invoices and number of items that will be billed

Guide to Upcoming Billing

- Five steps to run upcoming billing

Run Upcoming Billing

Clicking Run will immediately generate invoices.

Note:

Payment profile charges will take place on the scheduled invoice date; if that date is in the past, those profiles will be charged immediately.

Invoices to Create

Invoices to Create

Scheduled Billing Items

Value of Invoices

1

1

\$80.00

Next Bill Date Range

7/20/2023 - 7/20/2023

Overrides

Invoice Date ⓘ

Due Date ⓘ

Invoice Template

Invoice Terms

Invoice Message

Scheduled Payment Date ⓘ

Advanced Options ☒

Cancel

Run

Deliver Invoices

Deliver invoices from
Sales/Invoices tab in Billing module
Filter to the invoice date for invoices
just created

Deliver renewal invoices

- Email or print

Remove all invoices from Pending Delivery tab

- Remove but not deliver

The screenshot shows the 'Edit Email Invoices / Statements' window. It has a 'General' tab with the following fields:

- Deliver Type***: A dropdown menu with 'Invoices' selected.
- File Format***: A dropdown menu with 'Pdf' selected.
- Invoice Template**: A dropdown menu.
- Exclude Voluntary**: A checkbox that is currently unchecked.
- From***: A dropdown menu.
- Template**: A dropdown menu.
- Subject***: A text input field.

Below these fields is a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, text color, background color, bulleted list, numbered list, indent, outdent, and a 'Send' button. The editor area is currently empty.

Below the editor is a section titled 'Invoices To Email'. It includes a note: 'You filtered to 6 invoices on the previous screen. Select the top, upper left checkbox in the list below to send all of those or select specific invoices using the individual check boxes. Note: Emailing invoices may take several minutes.' Below the note is a table with the following data:

☐	Date	Inv #	Customer	Description	Total
☐	7/12/2023	42	Animal Shelters of America	Corporate Membership	\$6,000.00
☐	7/5/2023	41	Kalamazoo Animal Shelter	Default Membership	\$1,100.00
☐	7/5/2023	40	Sushi To Go	Default Membership	\$1,600.00

At the bottom right of the window are 'Cancel' and 'Send' buttons.

MANAGE 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](#)

Search...									
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

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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

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Fee Item Type*

Late Fee

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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

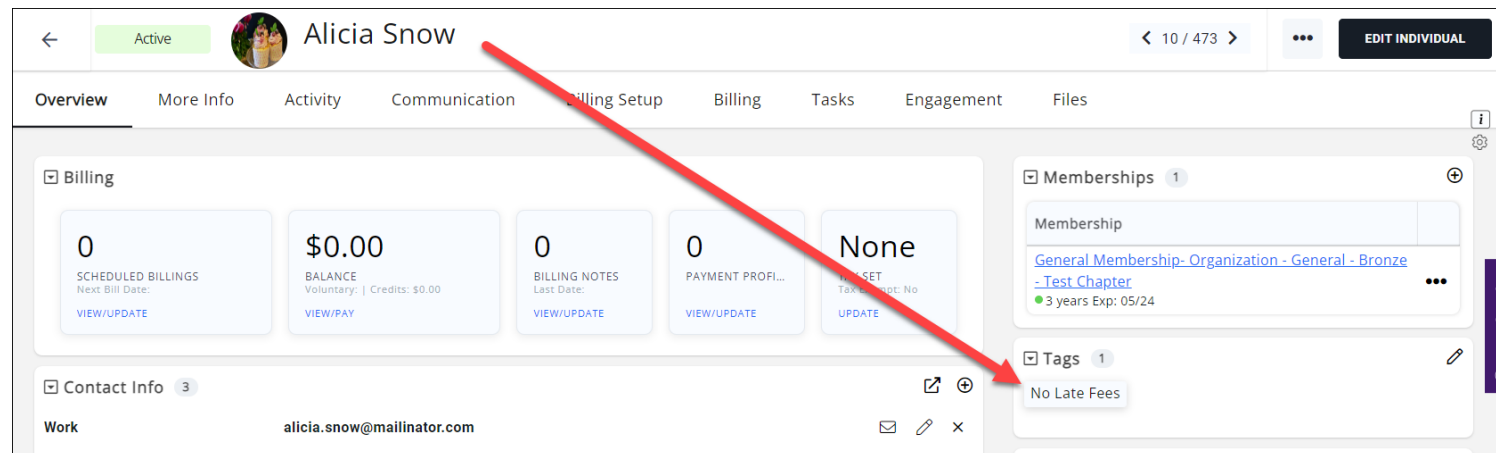
Program

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.



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

30

Membership Status

Exclude Tag(s)

No

No Late Fees

☐ Is Expired

Invoice Date

No Dates Selected

Invoice Amount >=

Invoice Amount <=

Cancel

Done

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

Cancel

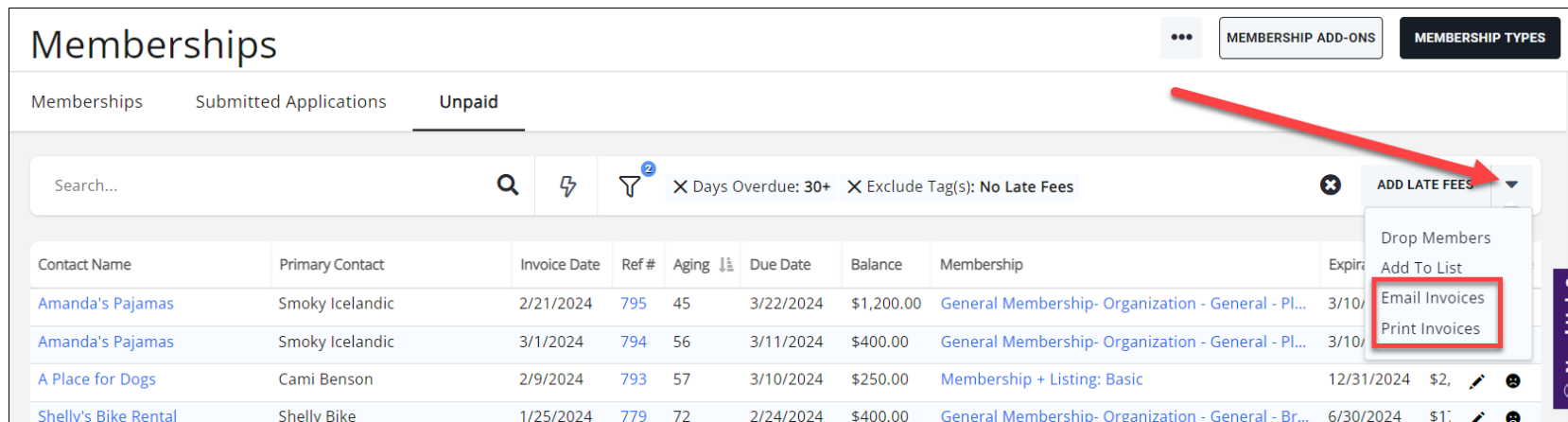
Apply Changes

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' page in the GrowthZone software. The 'Unpaid' tab is selected. A search bar and filters are visible at the top. A red arrow points to the 'ADD LATE FEES' button, which has a dropdown menu open. The dropdown menu contains the following options: 'Drop Members', 'Add To List', 'Email Invoices', and 'Print Invoices'. The 'Email Invoices' and 'Print Invoices' options are highlighted with a red box.

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
Shelly's Bike Rental	Shelly Bike	1/25/2024	779	72	2/24/2024	\$400.00	General Membership- Organization - General - Br...	6/30/2024

Mass Drop Overdue Members

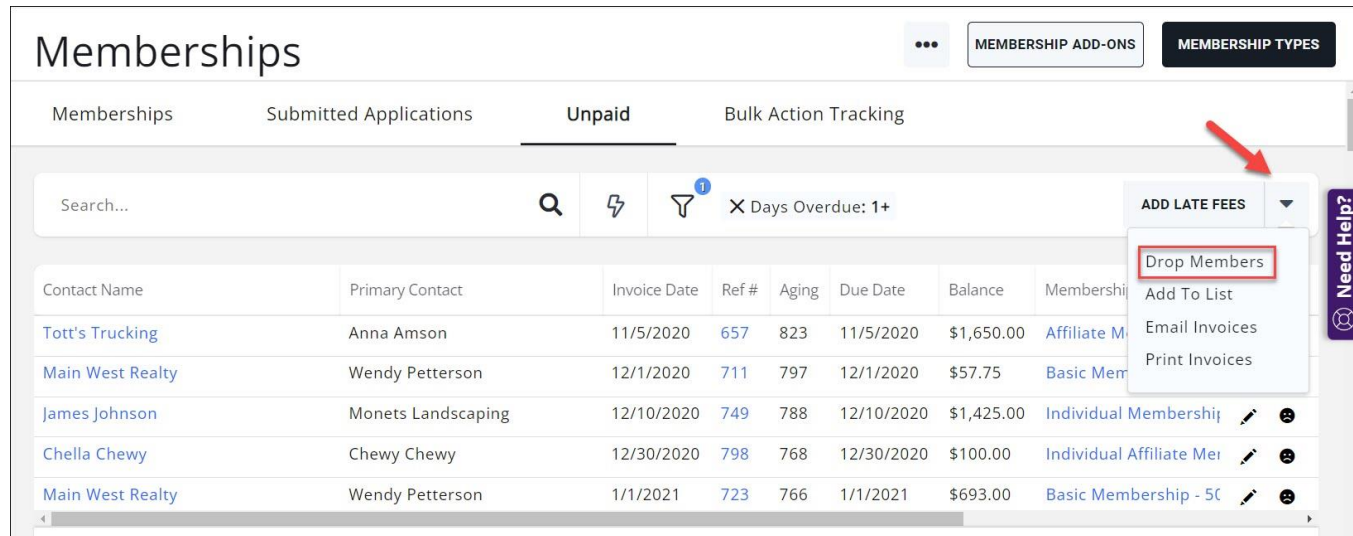
Mass Drop Overdue Members

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 currently selected. Below the tabs, there 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 Membership
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 - 50

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

Cancel

Apply Changes

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.