MANAGING RENEWALS

Renewal Settings

Understanding Recurring Billing

Which members need to be billed

- Recurring Fee Schedule

What membership(s) they should be billed for

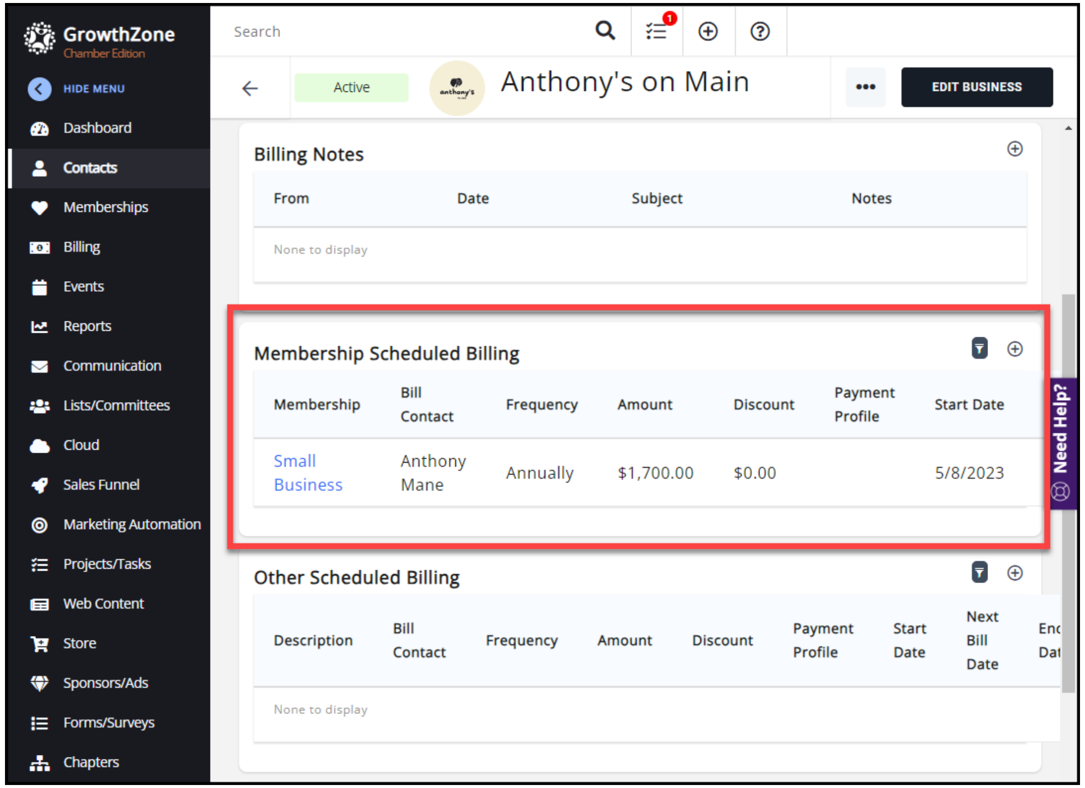
How much they should be billed

- Membership Type setup

When they should be billed

- Next Bill Date determined by membership term and frequency

How they wish to receive their invoice



Recommended Default Settings

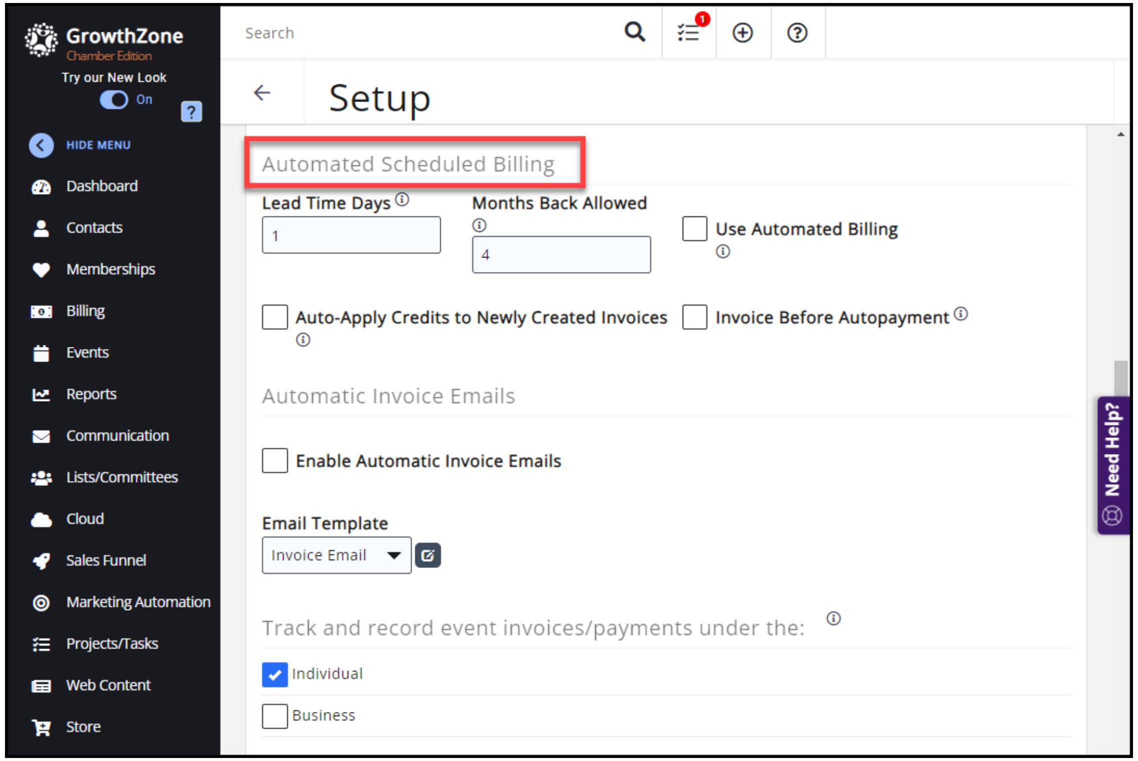
Set your logo for invoices & statements

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



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Data Verification

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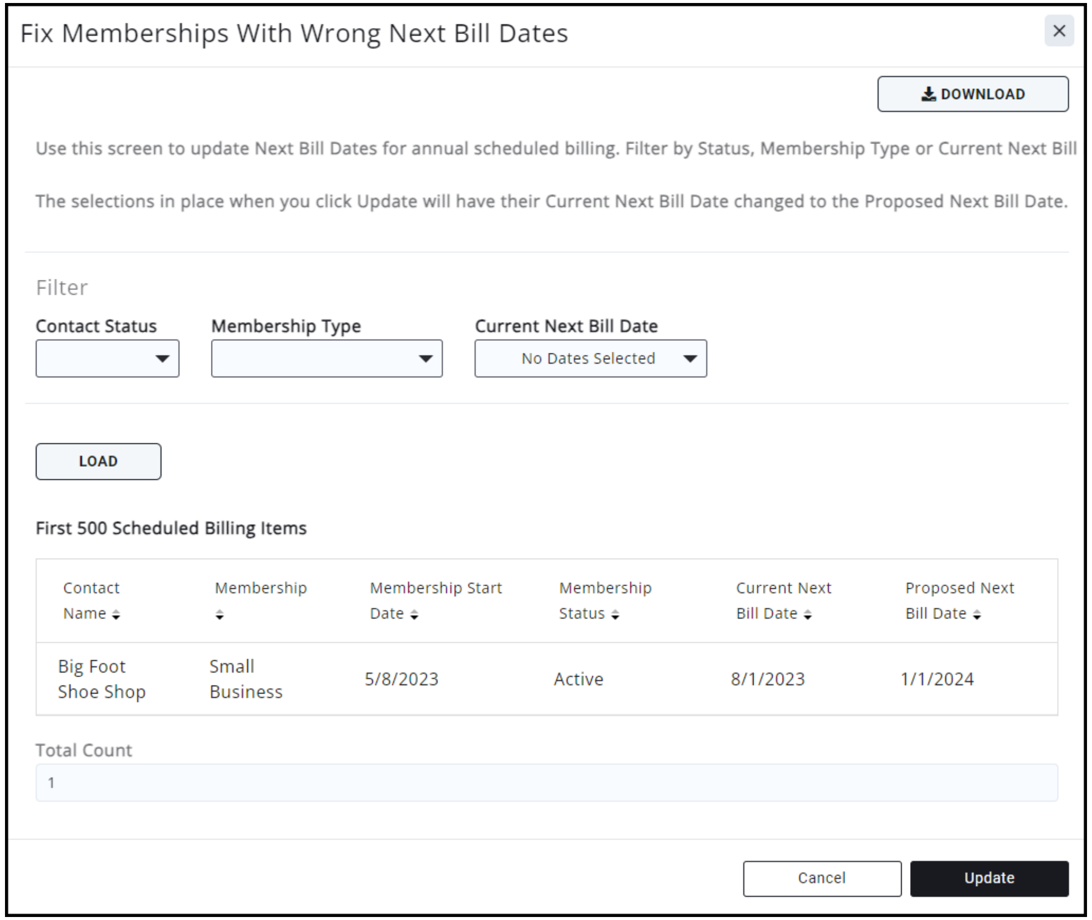
Best Practices: Next Bill Date

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



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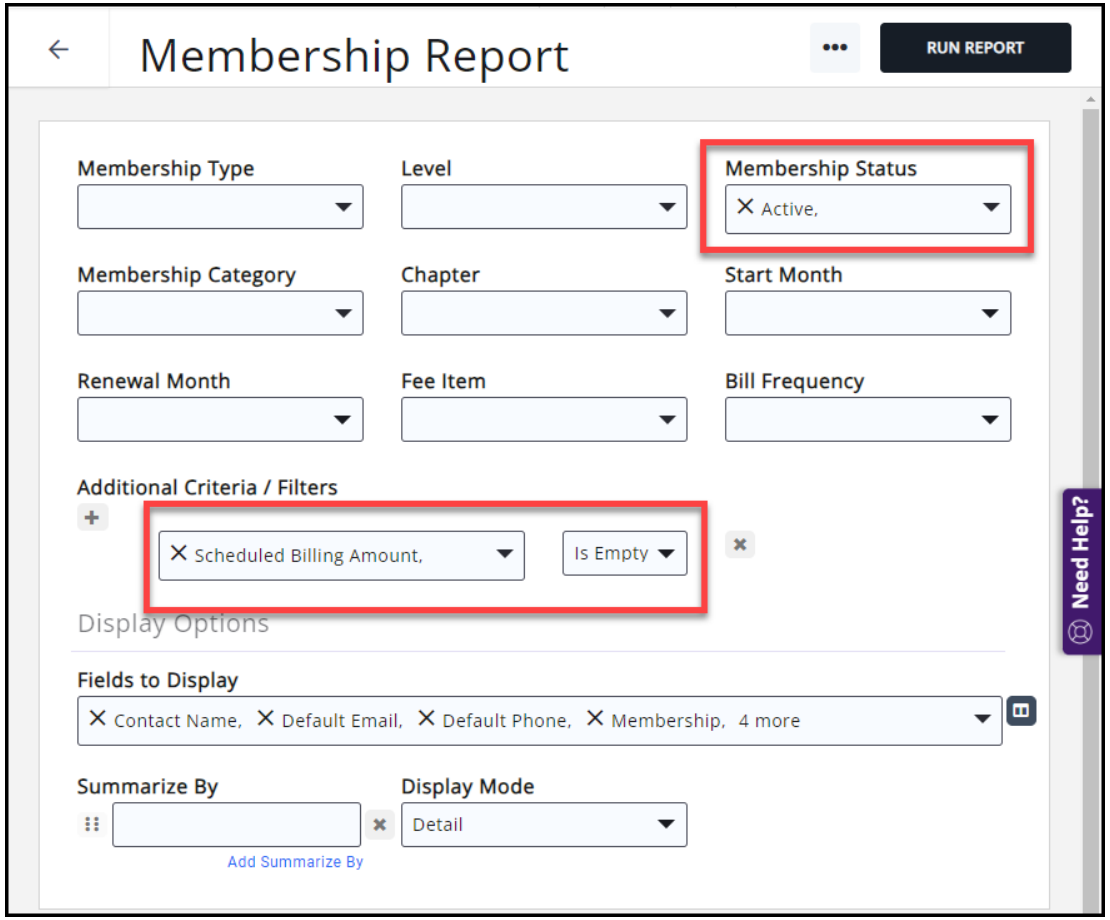
Best Practices: Recurring Fee Schedule

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



Best Practices: Accurate Billing Contact Info

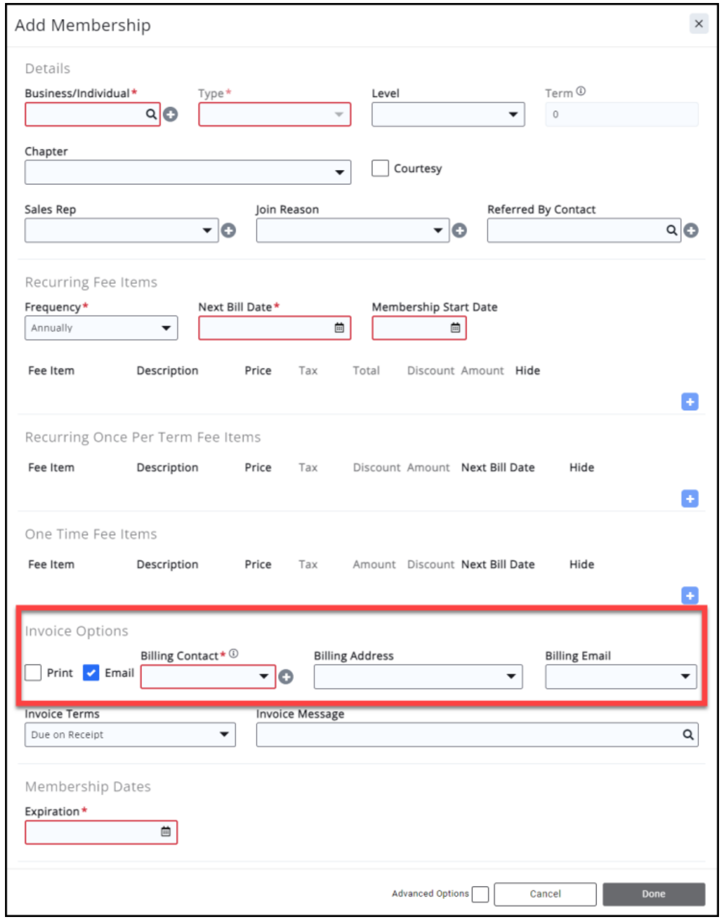
Assign Billing Contact during membership activation process

- 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

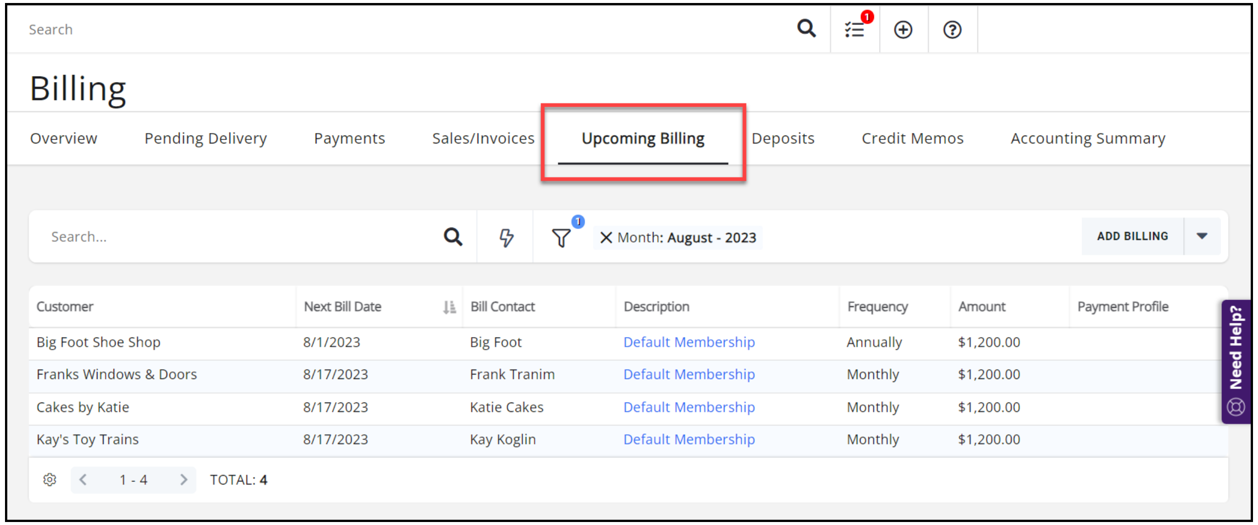


Best Practices: Upcoming Billing Tab

[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



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Generate & Deliver Invoices

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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

KALAMAZOO EST. 1990 CHAMBER

Run Upcoming Billing

Upcoming Billing tab

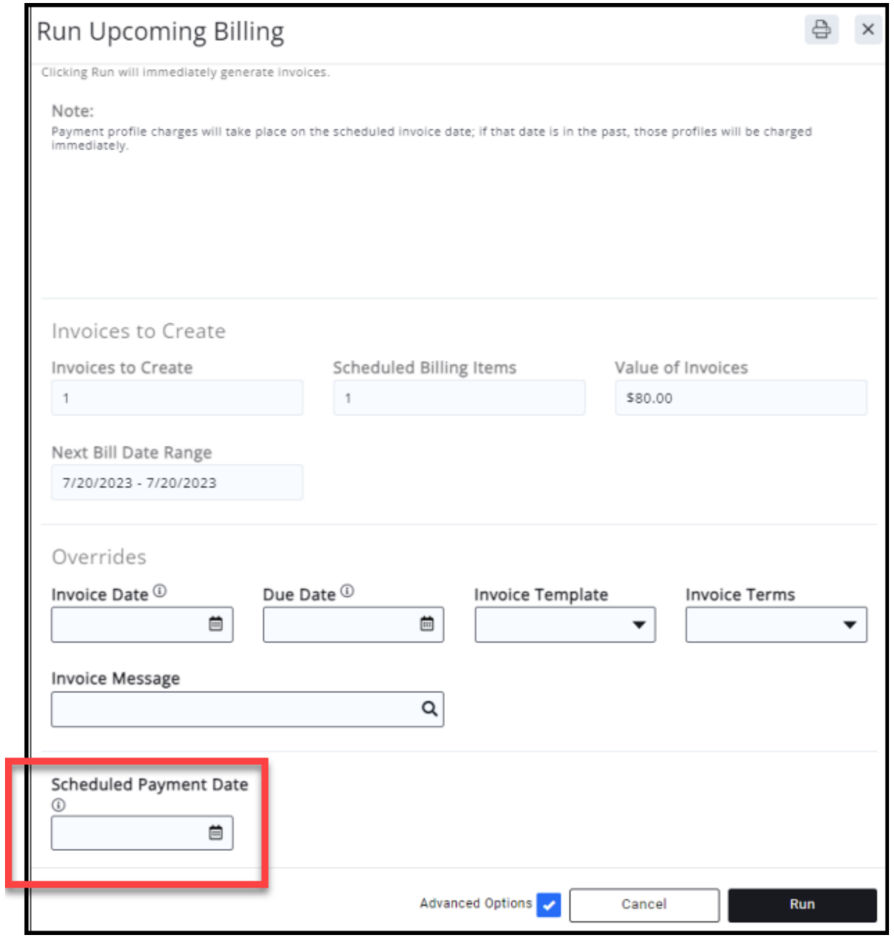
- Filter to those invoices you wish to generate

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



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Deliver Invoices

Deliver invoices from **Sales/Invoices** tab in Billing module

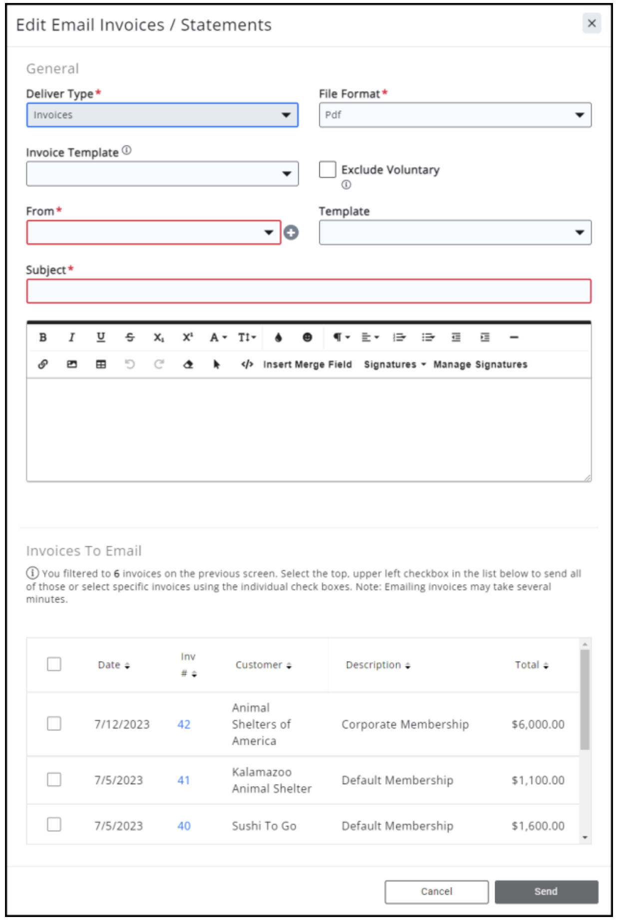
Filter to the invoice date for invoices just created

Deliver renewal invoices

- Email or print

Remove all invoices from Pending Delivery tab

- Remove but not deliver



MANAGE UNPAID DUES

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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... 3 Days Overdue: 120 Product Type: Donation 1 more NEW INVOICE

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	•••

Need Help?

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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.

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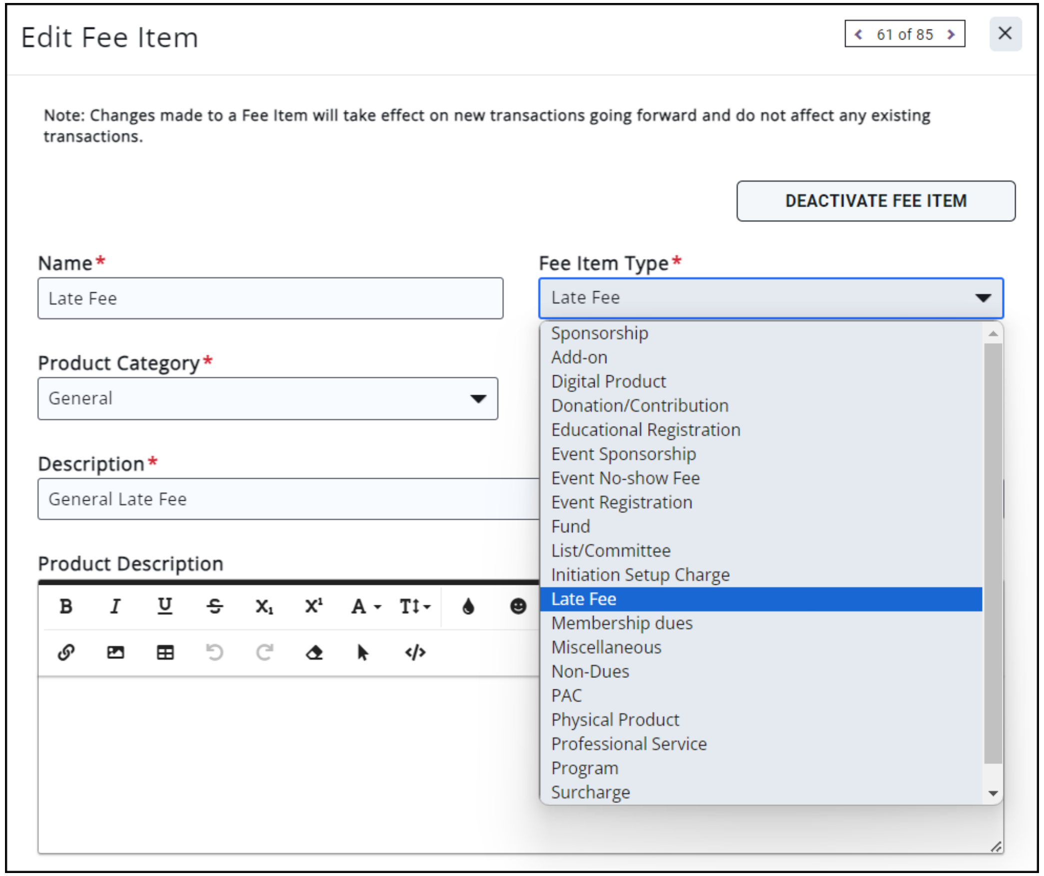
Apply Late Fees

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]()



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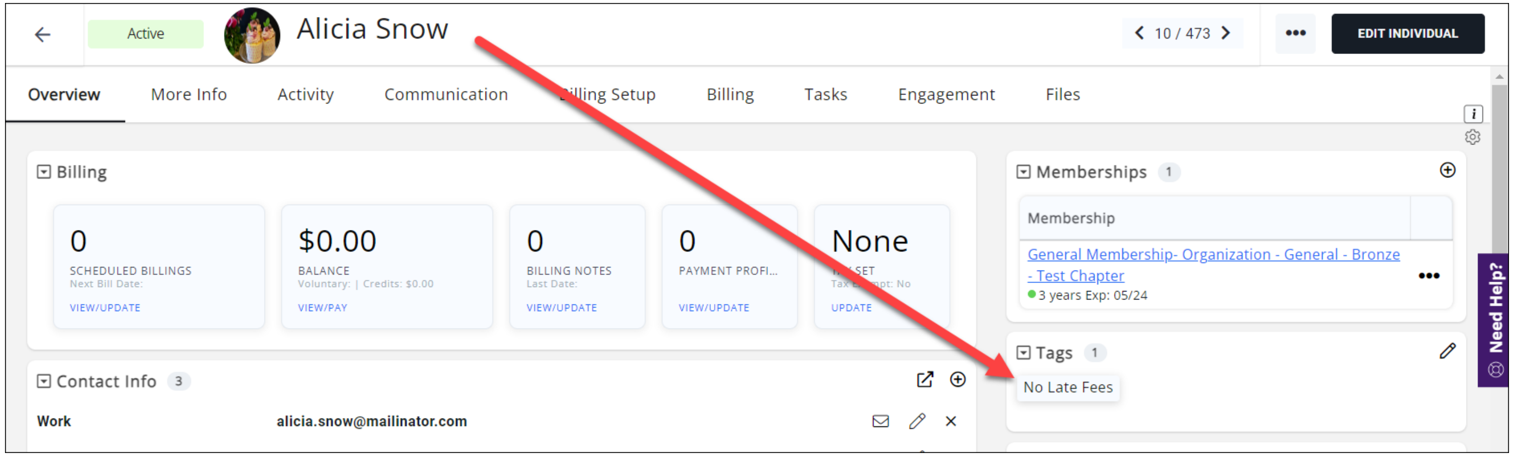
Apply Late Fees

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]

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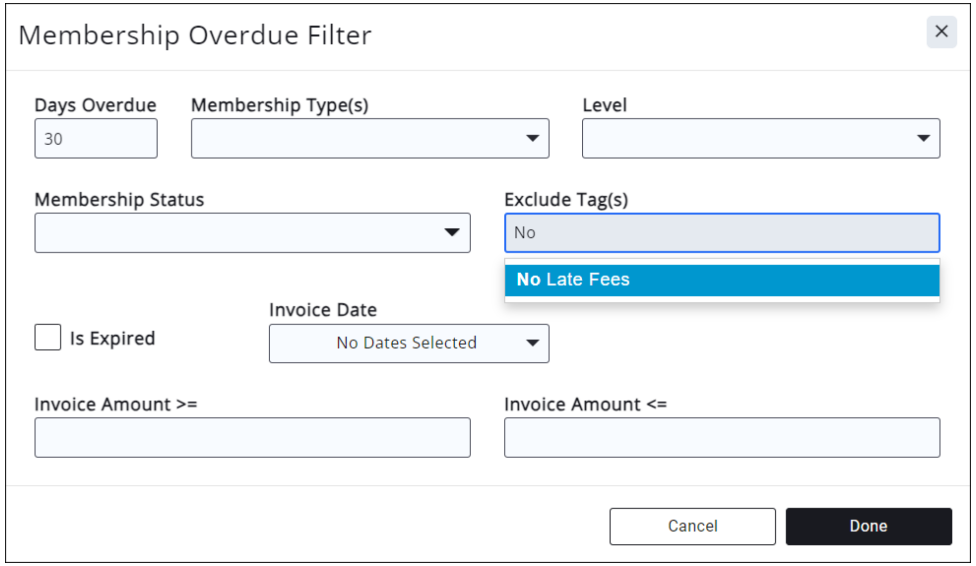
Apply Late Fees

Filter Unpaid tab to Overdue Invoices

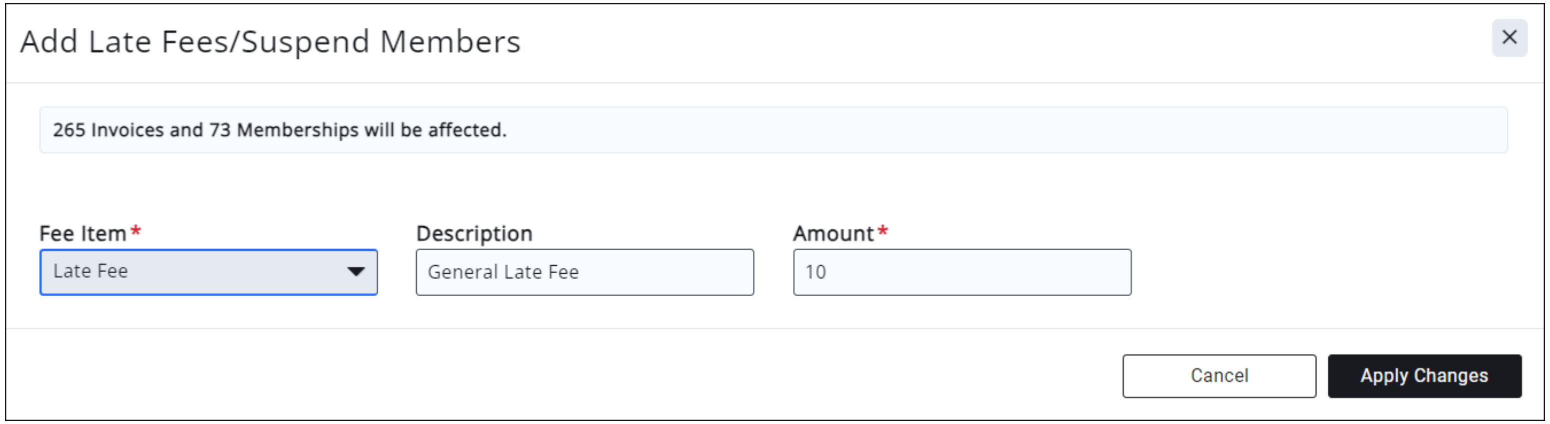
By default, this screen lists all open invoices for membership dues. Filter by membership type, invoice date, and tag so that only the correct overdue invoices will receive a late fee.



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.



Article: Add Late Fees to Overdue Membership Invoices in Bulk

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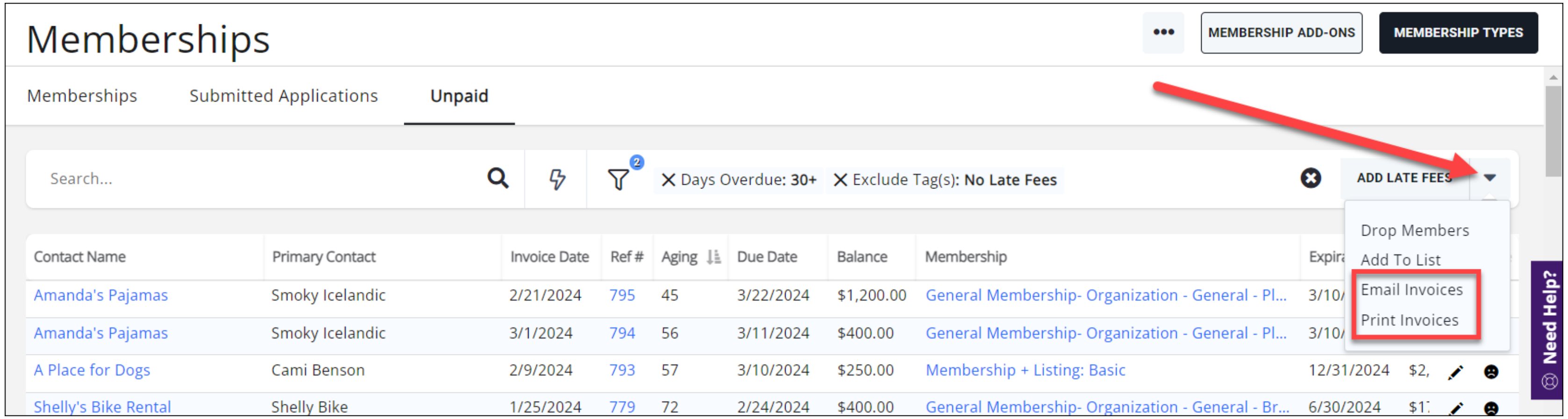
Apply Late Fees

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.



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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.

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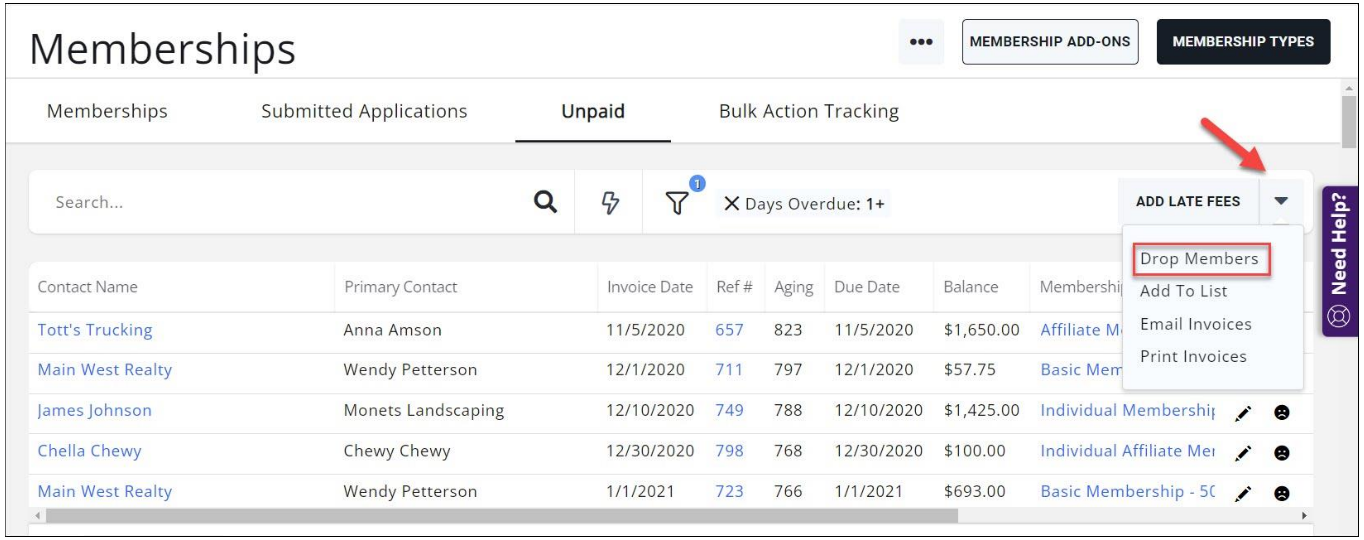
Mass Drop Overdue Members

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**.



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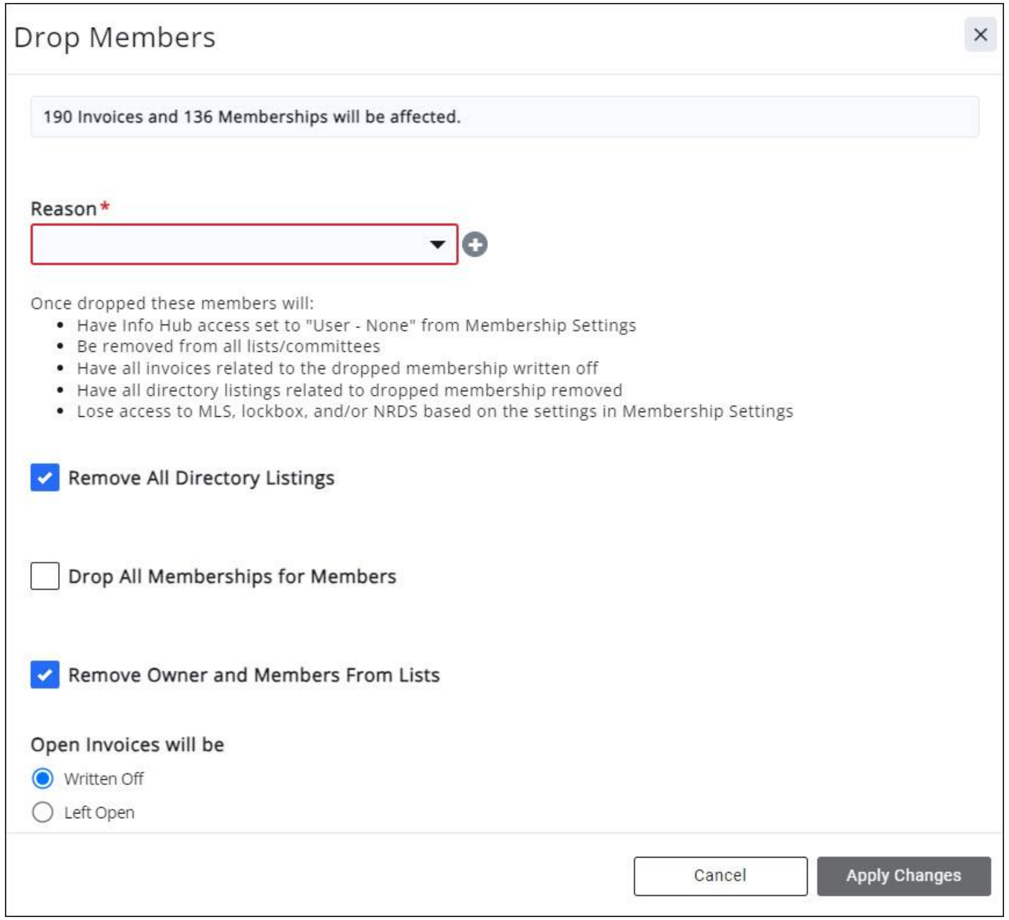
Mass Drop Overdue Members



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.