Realtor Renewal Billing Session 1 Configure your System for Billing Efficiencies

Agenda

General Finance Settings

Fee Item Setup

Agenda

- General Finance Settings
- Fee Items
- NAR Splits
- Invoice Templates

General Finance Settings

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

KB: Finance Settings

Logo for Invoices and Statements

Suggested logo size: 500px wide by 150px high (.jpg or .png) (Using this size will ensure printed invoices will properly display addresses in a standard window envelope.)

Disable Automated Billing Automated Billing

Automated Billing is useful if you frequently bill your members for a small set of items. Automated Billing can make your processes more complicated by requiring you to constantly monitor when your members will receive invoices. KB: Finance Settings

Automated Scheduled Billing

Lead Time Days ⓘ

```
30
```

Months Back Allowed ⓘ

```
4
```

☐ Use Automated Billing ⓘ

☐ Auto-Apply Credits to Newly Created Invoices ⓘ

☑ Invoice Before Autopayment ⓘ

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.

KB: Create Invoices prior to Charging Stored Payment Profile

Automated Scheduled Billing

Lead Time Days ⓘ

30

Months Back Allowed ⓘ

4

☐ Use Automated Billing ⓘ

☐ Auto-Apply Credits to Newly Created Invoices ⓘ

☑ Invoice Before Autopayment ⓘ

Set Lead Time Days to Greater Than Zero.

When set to 0 'Invoice Before Autopayment' will not process. 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

Automated Scheduled Billing

Lead Time Days ⓘ

30

Months Back Allowed ⓘ

4

☐ Use Automated Billing ⓘ

☐ Auto-Apply Credits to Newly Created Invoices ⓘ

☑ Invoice Before Autopayment ⓘ

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Disable Auto-Apply Credits to Newly Created Invoices

This should be disabled while creating your REALTOR® dues invoices. If this is enabled credits will be applied to your renewal invoices regardless of the reason the credit was issued

KB: Configure Auto-apply Credits/Overpayments

Automated Scheduled Billing

Lead Time Days ⓘ

30

Months Back Allowed ⓘ

4

☐ Use Automated Billing ⓘ

☐ Auto-Apply Credits to Newly Created Invoices ⓘ

☑ Invoice Before Autopayment ⓘ

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NAR eCommerce Splits

Confirm that money received for your fee items will be sent to the correct association and Bank ID

KB: NAR E-Commerce Initial Setup - Dues Split

Split Settings

Fee Item *	Split Association *	Association Bank ID
National Dues ▼	National ▼	
Local Membership Dues ▼	Association ▼	
State Membership Dues ▼	MN ▼	
RPAC ▼	Association ▼	
State Membership Dues 2022 ▼	MN ▼	
NAR Image ▼	National ▼	

Fee Item Settings

Financial Mapping

Fee Item *	NRDS Payment Type
National Dues ▼	NATL
State Dues ▼	STAT
RPAC ▼	RPAC
Local Membership Dues ▼	LOCL

Review Invoice Templates

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

KB: [View/Modify Invoice Template](#)

CP Realtor Board INTERNAL

CHERI REALTOR BOARD
- Since 2022 -

INVOICE 2972	PO NUMBER		1/1/2024

BILL TO | MESSAGE

Jack Anderson
Jack Anderson
657 West Larson Lane
Baxter, MN 87345

QUANTITY	DESCRIPTION		UNIT PRICE	TOTAL
1	Local Membership Dues	Annual	165.00	165.00
1	National Dues	Annual	160.00	160.00
1	State Dues	Annual	100.00	100.00
1	NAR Image	Annual	45.00	45.00
1	RPAC (Voluntary)	Annual	50.00	50.00

SUBTOTAL	520.00
SALES TAX	0.00
SHIPPING & HANDLING	0.00
TOTAL	**520.00**

PAYMENT/CREDIT/WRITE OFF/DISCOUNTS APPLIED	(0.00)
TOTAL DUE BY 1/1/2024	INCLUDING VOLUNTARY ITEMS	**520.00**

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Questions?

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