

Association Guide to Running Annual Dues Billing

This document outlines the settings and processes we have tested to ensure that your membership dues billing runs smoothly. Most of this guide focuses on fixed renewal membership billing (i.e., memberships that are all billed at the same time once per year) but almost all of the processes are also useful even if you bill your members monthly. Steps that are specifically for fixed renewal memberships are clearly labeled.

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:

- **Association dues/membership** = any fees for a membership that a member pays on a regular basis
- **Fixed Renewal membership** = a membership type where all members are billed at the same time


In-App Training:

Click the “Need Help?” sidebar 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.

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. For less frequent and larger billings, 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.

- **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 if you frequently credit members for specific items. If this is enabled when running your billing, credits for things like event registrations or sponsorships will be applied to membership dues. Members may have been planning to use a credit for something similar in the future and could be unpleasantly surprised when they discover it was already used.

Notes/Questions:

- **Enable the New My Billing Info**

We encourage you to enable the *Use the new My Billing Info tab* (if you haven't already). When enabled, your members will see a "My Billing Info" section in their Info Hub left-hand navigation. This makes it easier for members to view their open invoices, make payments, and download receipts.

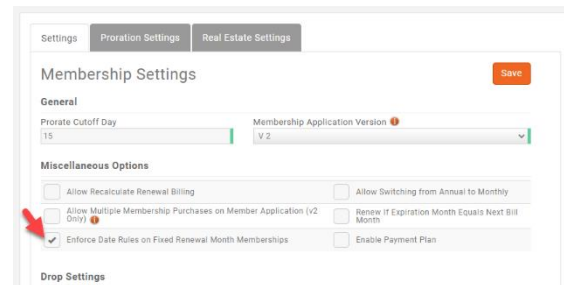
2. Membership Pricing Changes and Configurations

2.1 – Fixed Renewal Memberships: Enforce Date Rules

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.*



2.2 – Fixed Renewal Memberships: Membership Type Settings *Setup > Memberships, Types > Select desired membership name*

Fixed renewal Membership Types for association dues should be set to have everyone renew on the start date of the membership period. Even if you bill for memberships in advance or in arrears, this date should be the start date of the membership term (often the start of your fiscal year or the start of a new year).

 *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"**

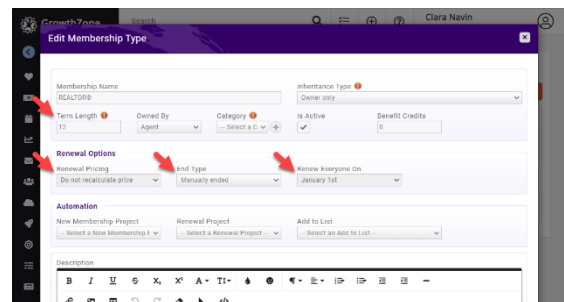
You may have previously configured your membership types to recalculate. This year we have a new feature specifically built to help out with the any dues increases for your 2023 membership year. We strongly suggest setting your membership to "Do not recalculate price" so that you can use this new feature.

- **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. We strongly suggest setting your membership to "Manually ended" for association membership types.

- **Fixed Renewal Memberships: Set Renew Everyone On**

This setting helps the system follow the membership year as defined by your association. This setting is also required to use the new feature that increases dues for your 2023 membership year.



Notes/Questions:

2.3 – Fixed Renewal Memberships: Membership Pricing Changes

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

This feature allows you to define when to charge increased membership dues and have the system automatically bill at that new rate for charges on or after a certain date. You can set this for 1 or more fee items on a membership. This feature does not yet work with formula-based pricing.

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

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

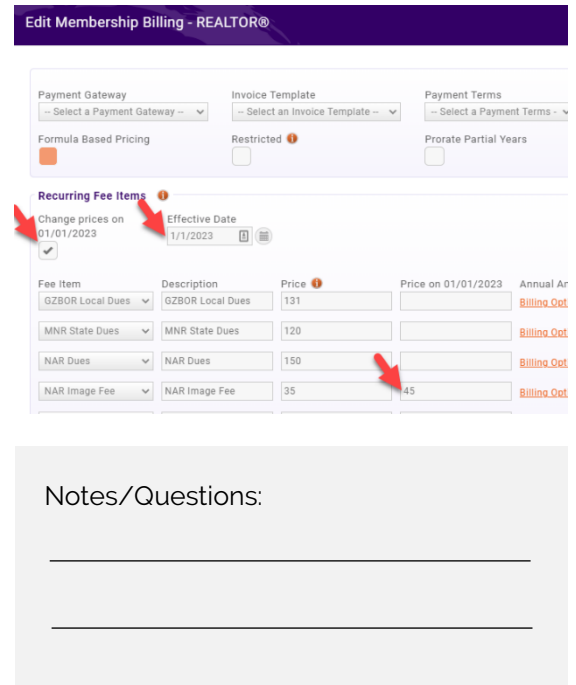
- Edit the membership type's pricing
- Enable "Change Prices On..."
- Pick your desired date for new pricing to start.
- Enter new prices in the "Price on <Date from step 3>" column. *Note: Leaving a field blank in this column will carry the current price forward.* (If using levels, see note below.)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



Fee Item	Description	Price	Price on 01/01/2023	Annual Ar
GZBOR Local Dues	GZBOR Local Dues	131		Billing Oct
MNR State Dues	MNR State Dues	120		Billing Oct
NAR Dues	NAR Dues	150		Billing Oct
NAR Image Fee	NAR Image Fee	35	45	Billing Oct

3. Verifying Your Data

3.1 Fixed Renewal Memberships: 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. When you previously set the "renew everyone on" date in step 2.2, 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.

Fix Memberships With Wrong Next Bill Dates Download

Use this screen to update Next Bill Dates for annual scheduled billing. Filter by Status, Membership Type or Current Next Bill Date, then click Load to see the proposed results.
The selections in place when you click Update will have their Current Next Bill Date changed to the Proposed Next Bill Date.

Filter

Contact Status: None Selected Membership Type: None Selected Current 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
Carly Lind	Bronze Membership	2/20/2019	Active	2/20/2019	1/1/2023
SageOne Foods	Red Membership	3/7/2019	Active	3/7/2020	1/1/2023
Rachel Hanson	Bronze Membership	9/21/2020	Active	9/21/2021	1/1/2023
Brittany Varner	Bronze Membership	8/1/2022	Active	10/1/2023	1/1/2023
Brittany Varner	Bronze Membership	8/1/2022	Active	10/1/2023	1/1/2023

Total Count
5

Cancel Update

Notes/Questions:

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

Use 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](#)

Notes/Questions:

[Accuracy](#). If the scheduled billing amounts are not correct, use the [adjust membership](#) option to update the schedule.

- **Confirm Dropped Members Do Not Have Scheduled Billing**
Ensures that you do not bill dropped members or non-members for unexpected items. While rare, if a dropped member or non-member has a scheduled membership billing, please contact our support team for help fixing this. 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 template*

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 include that year's disclaimers, dues deductibility statements, and other required disclosures to keep track of your messaging on each year's invoices.

Document Generation Templates ➕ Add

The following files are the templates that are used throughout the software to deliver key documents. To view or modify a template, complete the following steps:

1. Select the copy icon to the far right under "Actions".
2. Scroll to the bottom of the document list to view your copy. To change the file name or file type, choose the copied file name and complete your changes.
3. Select the "edit" icon under actions to launch the template to view and edit.
4. You will be taken to the document editor login. Enter your GrowthZone user name and password to launch the document.
5. Enable editing of the document, complete your changes, select save and close the document. Your changes will be saved. You can now choose this template where applicable.
6. For detailed instruction on adding merge fields to a document template, see "Add Merge Fields to a Document Template" in the Knowledgebase.

Template Type	Name	Actions
Invoice	invoice_TotalsSubTotal	
Invoice	invoice.docx	
Invoice	invoice-2020.docx	
Invoice	invoice-LETTER.docx	

Notes/Questions:

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.

Back to Setup

Invoice Billing finance Add Template Add Email Designer Template

Name	Category	Description	Shows in Template list	Actions
Invoice Email	Billing Finance	Default template for sending an invoice	Yes	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Membership Renewal- Invoice Emails	Billing Finance	For sending bulk or single member renewals invoice via emails to end users.	Yes	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Invoice Test Template	Billing Finance	To be used for invoices	Yes	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Renewal Email Example	Billing Finance	To be sent with renewal invoices.	Yes	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Renewal Invoice	Billing Finance	To be used when sending out invoices.	Yes	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Online Payment Receipt	Billing Finance	Receipt sent to user who pays an online invoice	No	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Member Invoice Payment Receipt	Billing Finance	Notification to end user when he/she pay invoice	No	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Notes/Questions:

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.

*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.

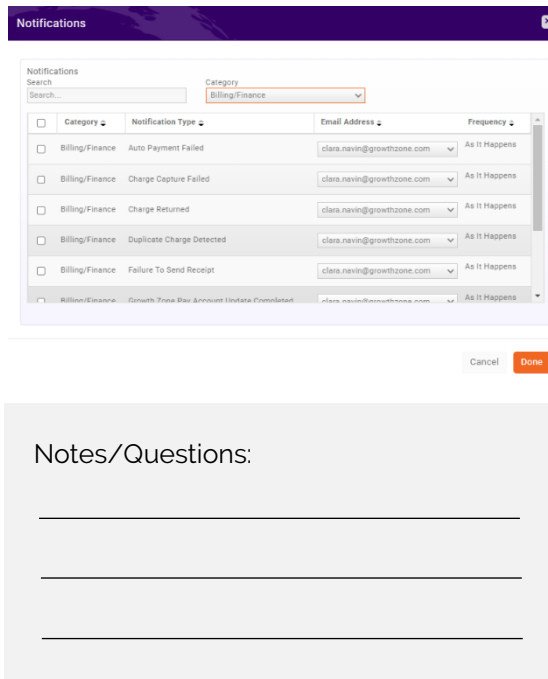
Notes/Questions:

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.



5. Run Upcoming Billing

You are now ready to generate your invoices for membership dues! Review the critical steps listed below to get started. The steps below use an example of a membership year that begins on January 1st and is billed several months in advance. Adjust the dates as needed for your association and by-laws.

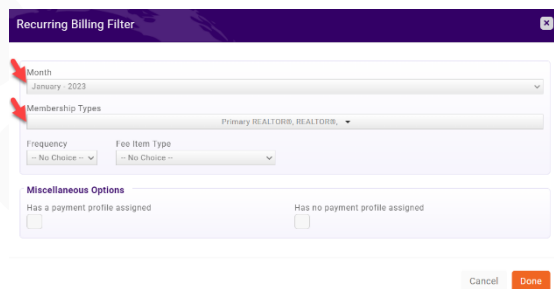
 *In-app guide available, under the "Need Help?" tab.*

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 the first month of your membership year (example: 1/1/2023)



- 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 member 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 members.

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: 10/1/2022)
- Set your desired Due Date (example: 11/1/2022)
- Set your desired Scheduled Payment Date (example 11/1/2022) *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:

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 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 that you used in step 5.2 (example: 10/1/2022).
- Set the Fee Item to be one of the line items of your membership. This will include all of your membership dues invoices but exclude any other invoices created with the same invoice date.

Sale/Invoice Filter

Invoice Date: Oct 1, 2022 - Oct 1, 2022

Payment Date: No Dates Selected

Membership Status: No Choice

Fee Item: NAR Dues

Membership Type: None Selected

Product Type: No Choice

Chapters: None Selected

Show Invoices with Zero Balance:

Show Current Invoices:

Show Open Invoices:

Show Overdue Invoices:

Credit Balance Available:

Days Overdue:

Show Sale Transactions:

Autopay: No Choice

Is Empty:

Cancel Done

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.

Edit Email Invoices / Statements

General

Deliver Type: Invoices

File Format: Pdf

Invoice Template (Override): Select an Invoice Template

Exclude Voluntary Amounts:

From: clara.navin@growthzone.com

Template: Membership Renewal - Invoice Emails

Subject: Membership Renewal Invoice

Body: Hello {{ Contact First Name }}
We are reaching out to remind you that {{ MPTName }} Membership expiration is coming up on {{ MPTExpirationDate }}.
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,
{{ TENName }}

Invoices To Email

You filtered to 7566 invoices on the previous screen. Select the checkbox below to send all of those. If needing to send to fewer than this, the best practice is to filter down to the desired invoices on the Sales/Invoices tab first before coming to this screen.

Select All:

Search within first 500 invoices

Search: _____

<input type="checkbox"/>	Date	inv #	Customer	Description	Total
<input type="checkbox"/>	7/26/2022	1	Andra Blahortosh	G2BOR Local Dues	\$436.00

Notes/Questions:

After Billing

Open the "Need Help" sidebar in GrowthZone to find the Association Post-Billing Guide that helps with collections, late fees, and drops.