You're Responsible for Billing… Now What?

As you view the Billing Manager video, here is a worksheet to help you make notes, and begin to define those functions available to you in your GrowthZone tool kit that will benefit you the most in managing your memberships. If you are currently going through onboarding, your notes are conversation topics you should plan to have with your project manager to guide your setup.

Transaction processing	
- Do you wish to customize your billing templates? - Do you wish to have credit memos auto-applied to future invoices? - Do you wish to offer discounts to new members? - Are any of your items taxable?	
Membership Dues Processing	
- Do you wish to prorate dues? - Do you wish the system to automatically generate invoices for upcoming billing? - Do you wish to add late fees to overdue membership invoices? - Do you wish to have membership dues recalculated automatically? - Do you wish to setup auto-drop for memberships?	
Payment Processing	
If you're planning on using GrowthZone Pay…	
- Do you wish your members to be able to store payment profiles? - Do you wish for the system to automatically charge members payment profiles?	

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Reports

Your GrowthZone toolkit provides a wealth of reports to help you analyze your financials...

• What reports do you regularly generate to analyze your financials	

Building Blocks

• Which accounts from your Chart of Accounts will be needed by GrowthZone? • What fee items will be needed by GrowthZone? • Do you wish to customize your billing templates?	