

GrowthZone Classroom Training: 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 software interface. The sidebar menu on the left includes 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 profile for 'Anthony's on Main' with an 'Active' status and an 'EDIT BUSINESS' button. Below this, there are three sections: 'Billing Notes' (empty), 'Membership Scheduled Billing' (highlighted with a red box), and 'Other Scheduled Billing' (empty). The 'Membership Scheduled Billing' table contains one entry for 'Small Business' with a bill contact of 'Anthony Mane', an annual frequency, an amount of \$1,700.00, a \$0.00 discount, and a start date of 5/8/2023.

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

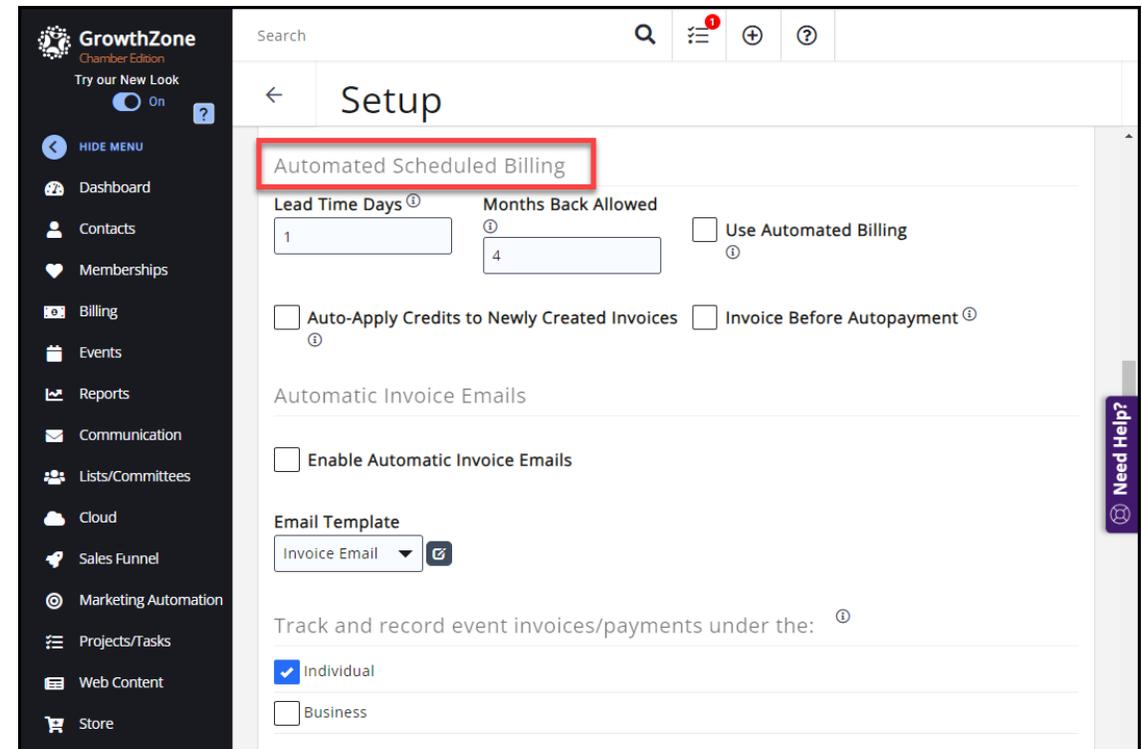
Set your [logo](#) for invoices & statements

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 items: 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. A red box highlights the 'Automated Scheduled Billing' section. Below this, the 'Lead Time Days' is set to 1, and 'Months Back Allowed' is set to 4. The 'Use Automated Billing' checkbox is unchecked. Other options include 'Auto-Apply Credits to Newly Created Invoices' (unchecked), 'Invoice Before Autopayment' (unchecked), and 'Automatic Invoice Emails' (unchecked). The 'Email Template' is set to 'Invoice Email'. At the bottom, 'Track and record event invoices/payments under the:' is set to 'Individual' (checked) and 'Business' (unchecked). A 'Need Help?' button is visible 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

[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 Status: Membership Type: Current Next Bill Date:

[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:

[Cancel](#) [Update](#)

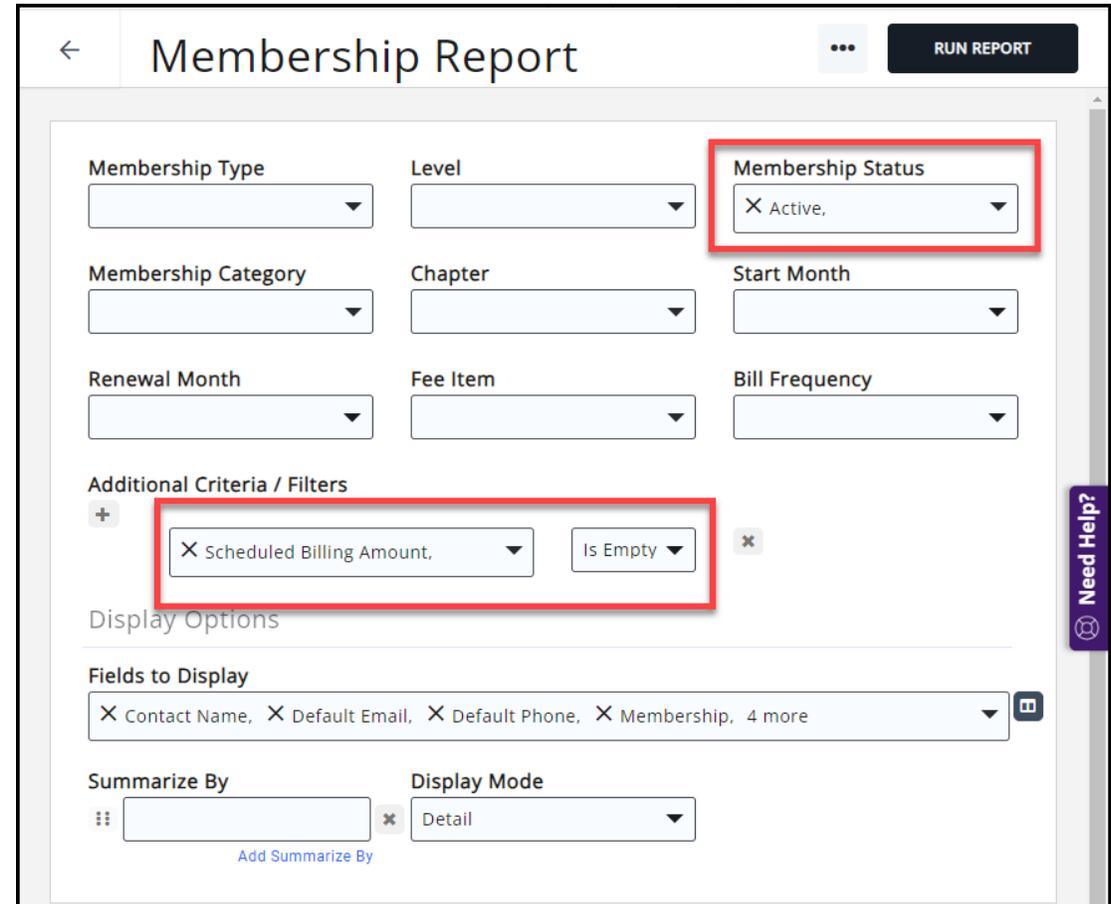
Best Practices: Recurring Fee Schedule

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. It features several filter dropdowns: 'Membership Type', 'Level', 'Membership Status' (highlighted with a red box and containing 'X Active'), 'Membership Category', 'Chapter', 'Start Month', 'Renewal Month', 'Fee Item', and 'Bill Frequency'. Below these is an 'Additional Criteria / Filters' section with a plus sign, containing a filter for 'X Scheduled Billing Amount' and 'Is Empty' (both highlighted with a red box). The 'Display Options' section includes 'Fields to Display' (showing 'X Contact Name, X Default Email, X Default Phone, X Membership, 4 more') and 'Summarize By' (with an 'Add Summarize By' link) and 'Display Mode' (set to 'Detail'). A 'RUN REPORT' button is in the top right, and a '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 []

Chapter [] Courtesy

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

Recurring Fee Items

Frequency* [] 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 [] Billing Contact* [] [] Billing Address [] Billing Email []

Invoice Terms [] 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

General

Deliver Type* Invoices File Format* Pdf

Invoice Template Invoice Template Exclude Voluntary

From* From* Template

Subject* Subject*

Invoices To Email

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.

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

Cancel Send

THANK YOU!!!