GrowthZone Classroom Training: Managing Renewals

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RENEWAL SETTINGS

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Understanding Recurring Billing

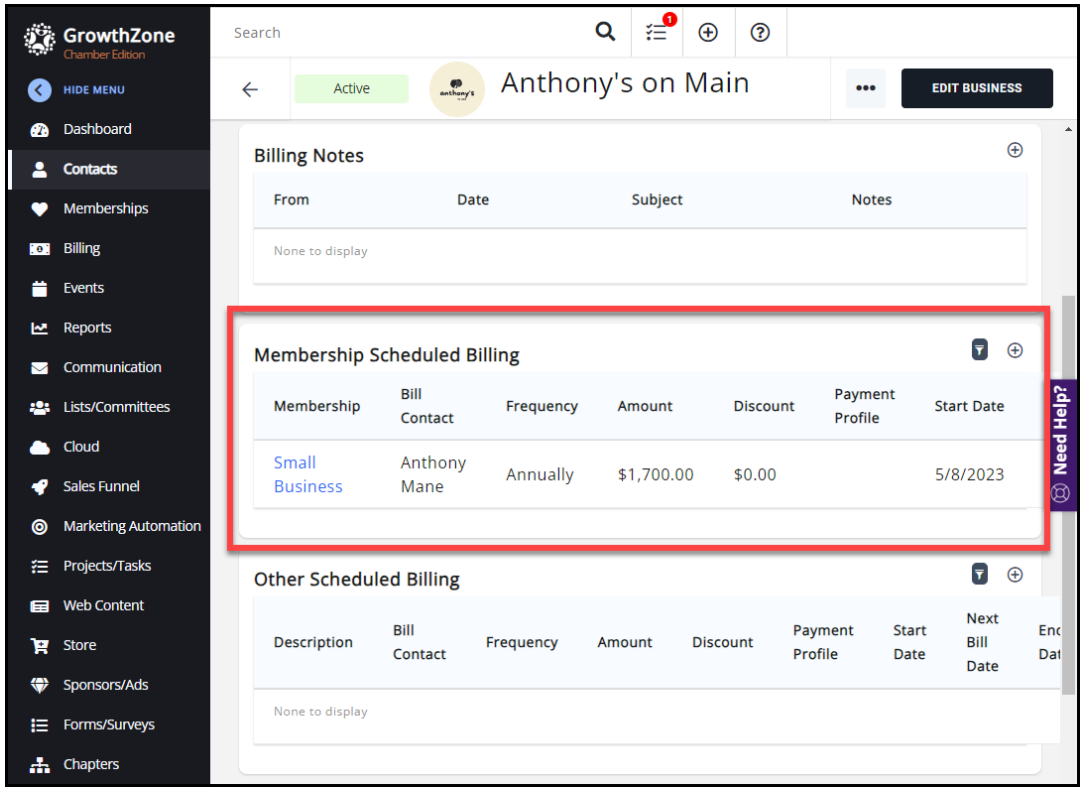
Which members need to be billed
- Recurring Fee Schedule

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



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Recommended Default Settings

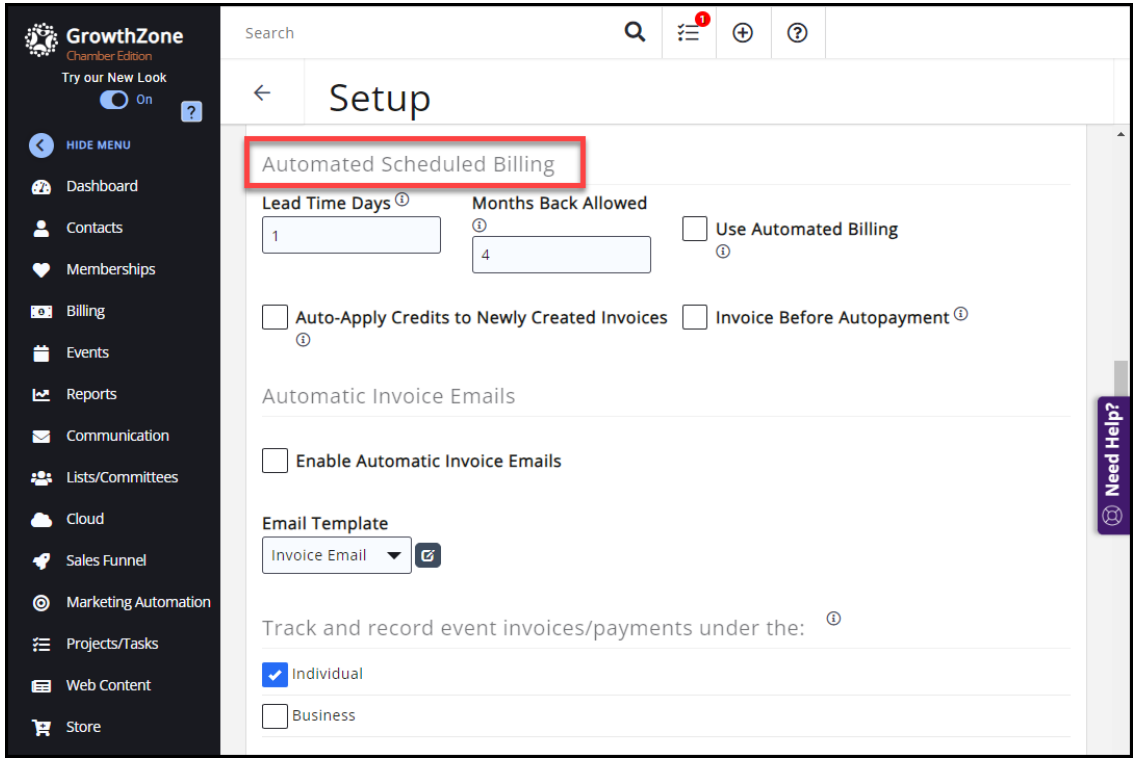
Set your logo for invoices & statements

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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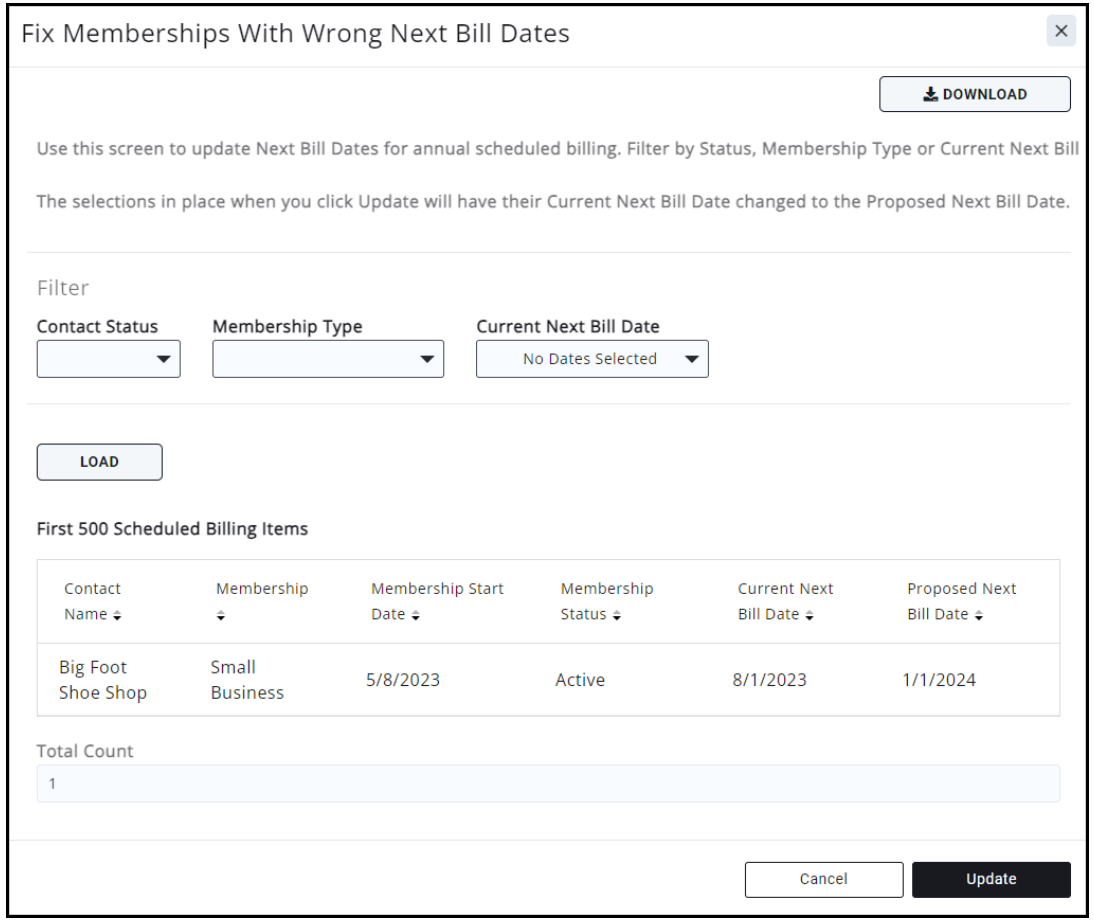
Best Practices: Next Bill Date

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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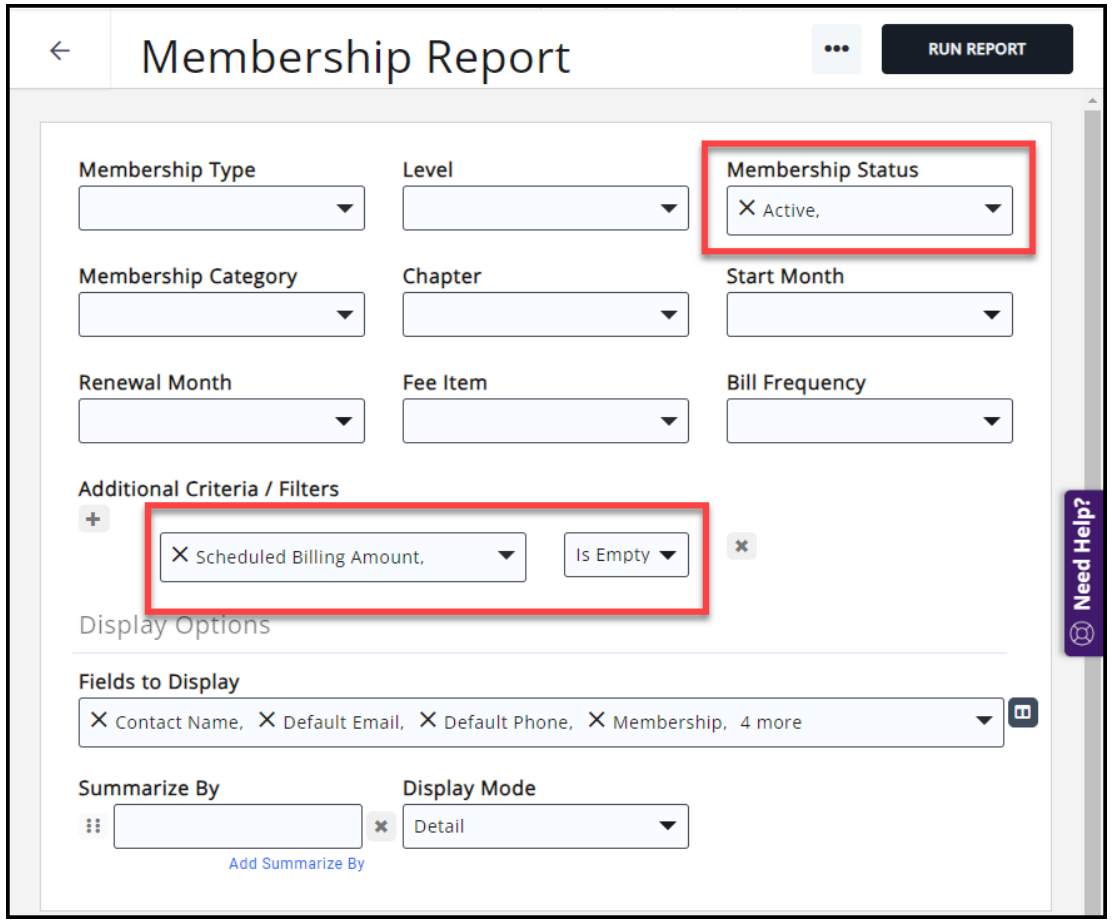
Best Practices: Recurring Fee Schedule

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



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Best Practices: Accurate Billing Contact Info

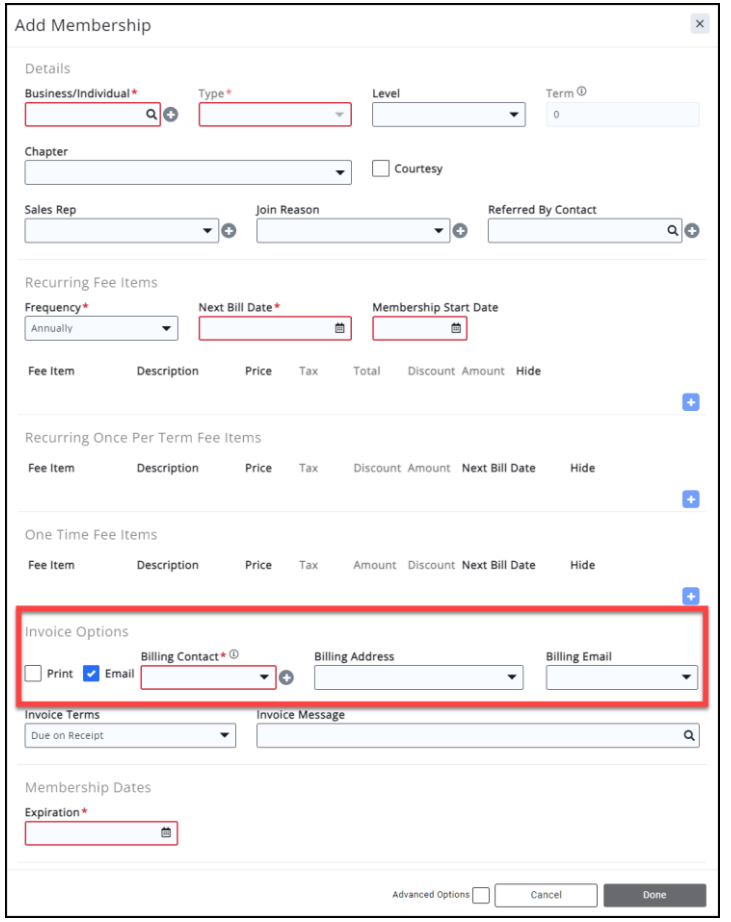
Assign Billing Contact during membership activation process

- 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



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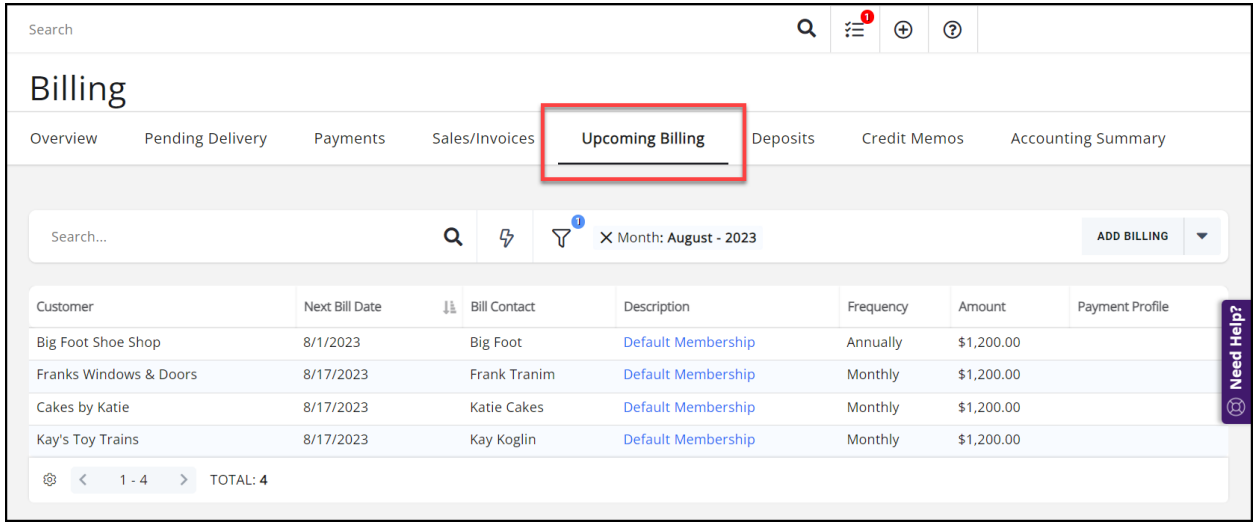
Best Practices: Upcoming Billing Tab

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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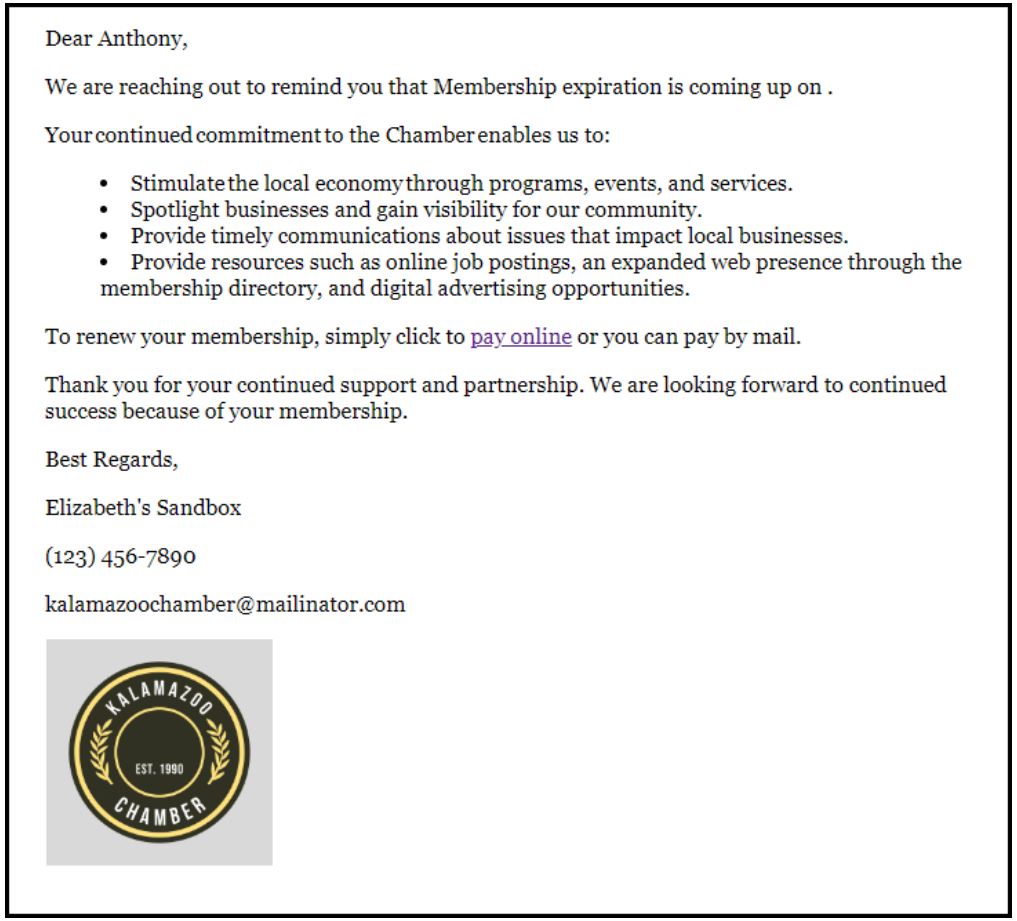
Preparation

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

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Run Upcoming Billing

Upcoming Billing tab

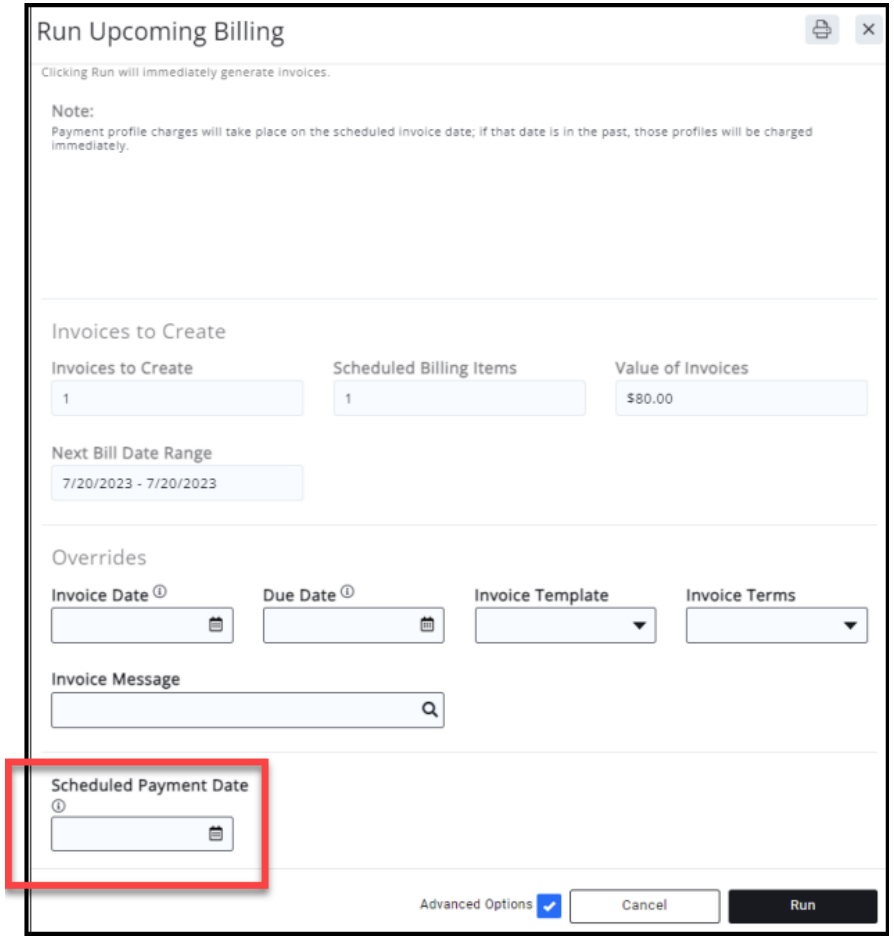
- Filter to those invoices you wish to generate

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

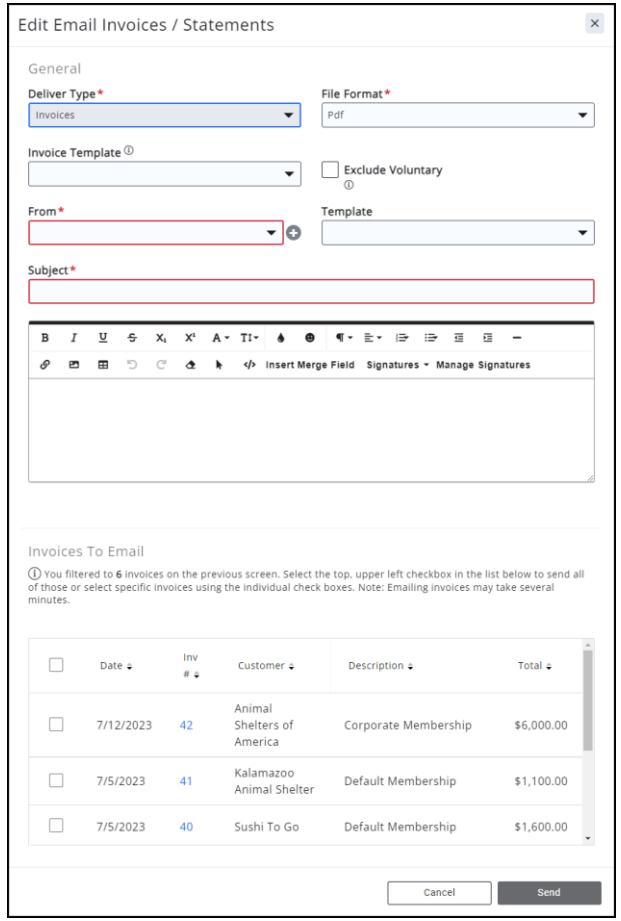
Filter to the invoice date for invoices just created

Deliver renewal invoices

- Email or print

Remove all invoices from Pending Delivery tab

- Remove but not deliver



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THANK YOU!!!

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