Association Guide to Running Dues Billing

This document outlines the settings and processes we have tested to make sure your membership dues billing — and any dues increases — run 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. If you have successfully run billing in the past using different settings and processes, keep doing what works for you.

In this guide, you'll find the following:

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?” tab on the right side of any GrowthZone screen to open the Resource Center. Inside, 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 an in-app guide walks you through those steps in more detail.

Last Updated: May 26, 2026

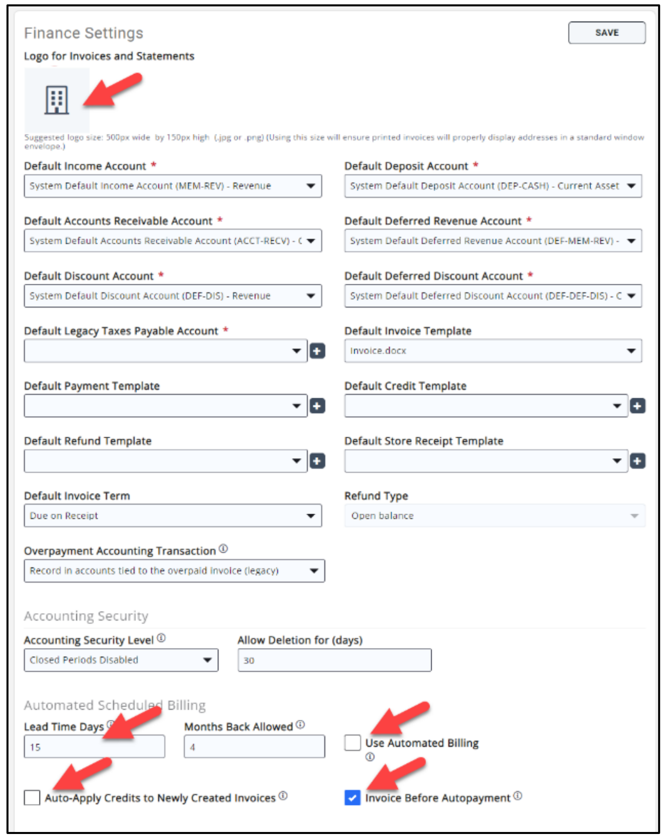
1. System Setup Review

1.1 – Finance General Settings

These settings enable and disable different features in the system. Because these dues are typically billed once a year, the suggestions below favor giving your team control over your billing instead of automating the process.

Article: [General Finance Settings]()

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



- ○ **Ensure you have a Logo for Invoices and Statements**

  The logo on 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 that case you would remove the <logo> merge field from your template.*

- ○ **Disable Automated Billing**

  Automated Billing is useful if you frequently bill members for a small set of items. As a real estate association, you have a variety of dues and fees billed on different schedules. Automated Billing can complicate your process by requiring you to constantly monitor when 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 Invoice Before Autopayment when set to 0. The exact value only matters if you're using automated billing. Since you're not, set this to 15 — a reasonable default if you choose to use automated billing in the future.

- ○ **Enable Invoice Before Autopayment**

  With *Invoice Before Autopayment* enabled, invoices that indicate the invoice will be paid by payment profile (on a specific date) generate when you run your upcoming billing. You can set the date these automatic charges happen when generating your membership dues invoices.

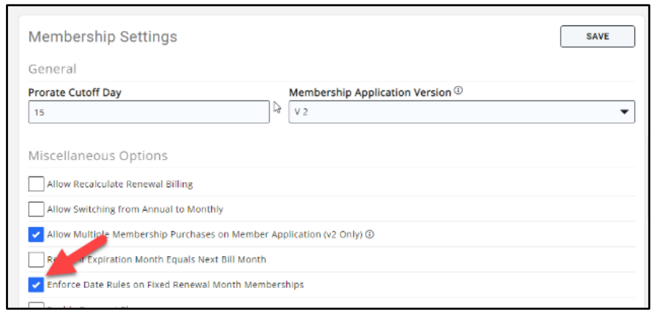
- ○ **Disable Auto-Apply Credits to Newly Created Invoices**

  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.

2. Membership Pricing Changes and Configurations

2.1 – Enforce Date Rules on Fixed Renewal Month Memberships

This setting prevents you from unintentionally changing the Next Bill Dates for scheduled billing items linked to memberships that renew on a certain date. It prevents most situations where a member does not receive a membership dues invoice when they should have.



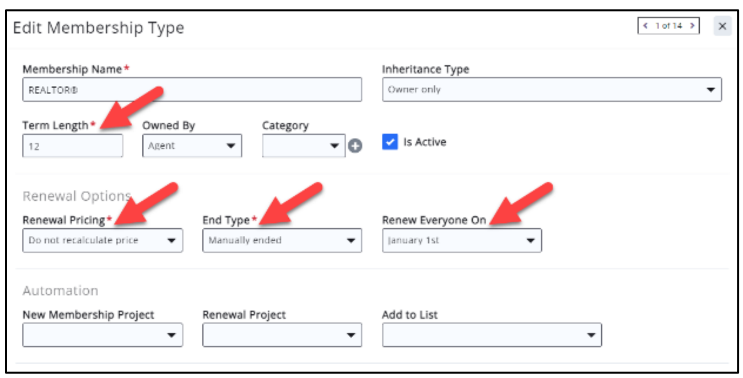
In-app guide available, under the "Need Help?" tab.

2.2 – Fixed Renewal Memberships: Membership Type Settings

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).

Article: [Add a New Membership Type]

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. The newer feature for dues increases (see section 2.3) is faster and easier. Set your membership to "Do not recalculate price" so you can use it.

- **End Type Should be "Manually Ended"**

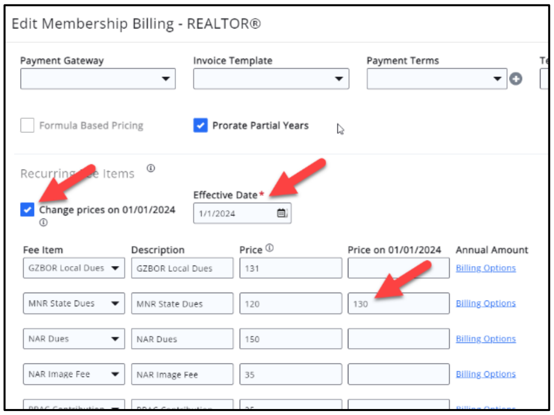
  GrowthZone can automatically drop members who have not paid for a set number of days after their original invoice date. We strongly suggest setting your membership to "Manually ended" for association membership types.

- **Set "Renew Everyone On" to January 1st**

  This setting helps the system follow the membership year as defined by your association.

2.3 – Fixed Renewal Memberships: Membership Pricing Changes

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.



Article: [Effective Date 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 carries the current price forward. (If using levels, see note below.)*
- Save your changes.

Repeat for each affected membership type.

For associations using Levels within Membership Types: set the "Change Pricing on…" date within the Membership Type pricing screen, then make pricing adjustments on the Level(s) itself.

Note: to use 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*

3. Verifying Your Data

3.1 – Fixed Renewal Memberships: Review Next Bill Dates

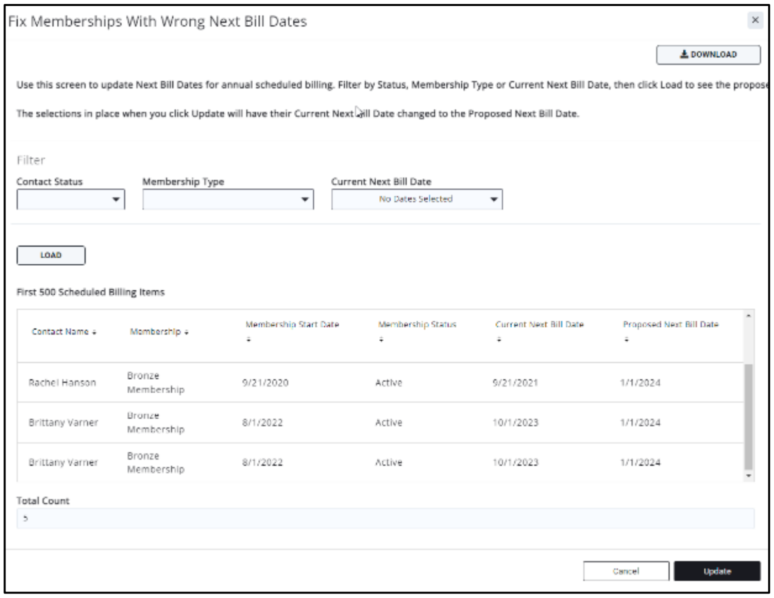
We built a tool to help associations identify members (if any) that may have the wrong next bill dates for their annual scheduled billings. Because your association has set the "renews on" date to Jan 1 for association memberships, the system can use that information to flag next bill dates that don't align with the expected date. Use this tool to double-check that members will be billed and charged on the dates you expect.

Article: [Review Next Bill Dates]

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

To use this tool:

- **Open the Review Next Bill Dates tool** under Setup.
- **Review the members listed** (if any).
  - *Note: members listed here have next bill dates that aren't expected — meaning, the current Next Bill date is different from the "Renews on…" date set on each membership type. Notice the "Current Next Bill Date" and "Proposed Next Bill Date" columns.*
- **Filter results** (if needed) by Status, Membership Type, or Current Next Bill Date. Then click "Load" to see the proposed results.



- **Click "Update"** to kick off a mass change for those filtered results, updating Current Next Bill Date to Proposed Next Bill Date. This updates all scheduled billing with incorrect next bill dates even though only the first 500 are listed. If you have more than 500, use the Download button at the top of the screen to review every scheduled billing item that will be changed.

3.2 – Review Reports to Validate Membership Billing

Use the reports listed below to confirm that your data is complete and accurate. Verifying this data — though sometimes time-consuming — catches unintended issues before you run billing. Save your reports so you can easily run them each time you prepare to generate upcoming billing.

> **TIP:** In most reports, you can add your report results to a list as an easy way to communicate with 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 Verify that All Members have a Scheduled Billing. If the member doesn't have a scheduled billing, use the upgrade/downgrade options to assign one.

○ **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 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**

  If a dropped or non-member has a scheduled membership billing, this is rare and will require our support team to fix. 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 or address information, use the adjust membership option to assign this information to the membership.

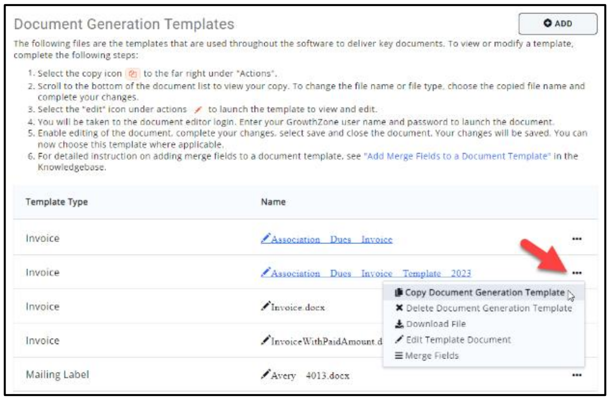
- **Check for Expired Payment Profiles**

  Use the Stored Payment Profiles 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(s)

We suggest creating a new invoice template for each year's association dues billing. This gives you a chance to review your dues deductibility statement and update other policies that may have changed since last year. See View/Modify Invoice Templates for instructions if you wish to review and update your template.

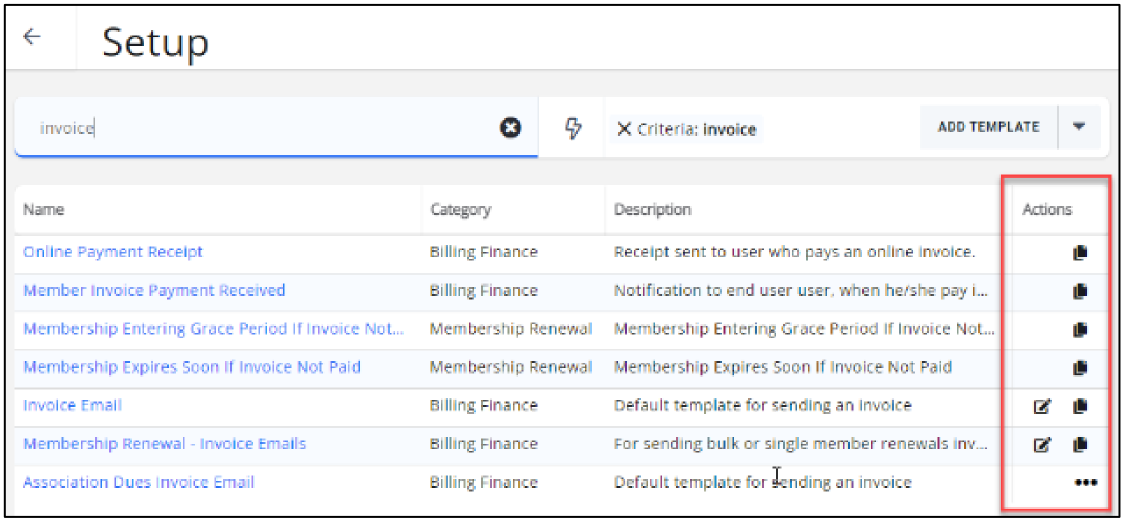


> **TIP:** Copy an existing invoice template (or create a new one) each year to include that year's disclaimers, dues deductibility statements, and other required disclosures. Keeps your messaging on each year's invoices easy to track.

4.2 – Review Email Template to Send with Invoices

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 you want members to see both in their dues email and on their invoice document. See Create and Manage Email Templates if you wish to review and update your email templates.

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



TIP: Copy an 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.

4.3 – Review Member-Facing Automated Messages

The following emails are sent to members throughout the invoicing and payment process. Review the templates below to make sure they accurately describe your association's processes and follow your brand standards.

- The **Online Payment Receipt** email template is sent when the system successfully charges a saved credit card, or when 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 the payment processor has an issue charging it.

Note: whether you've created a new email template or just want to double-check which template will be sent, set the correct email template in the Automated Messages area of setup. See Automated Messaging for more information.

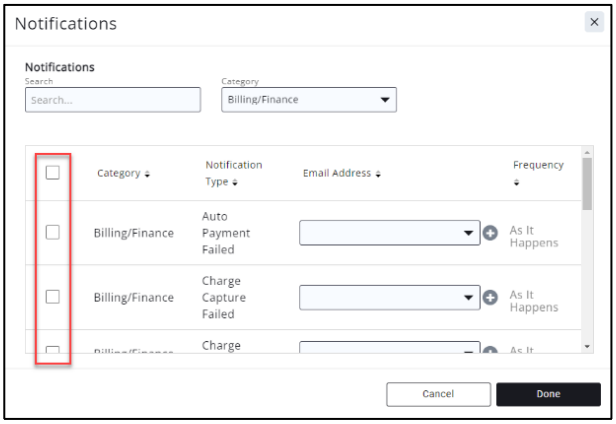
In-app guide available, under the "Need Help?" tab.

4.4 – Ensure Staff Enable Billing Related Notifications

Make sure you and your staff receive the right notifications to keep your billing process running smoothly. Just like an airplane safety video, set your own notifications before assisting the rest of your team with theirs. To modify your notifications, click your name in the top right of the screen, then click **My Notifications**. View all Billing-related notifications by setting the Category to "Billing/Finance". Review a few key notifications, listed below.

Article: [Subscribe to Automated Staff Notifications]()

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



- **Auto Payment Failed** — Sent if the payment processor cannot charge a saved credit card.
- **Charge Capture Failed** — Very rare. Sent if the payment processor successfully authorizes a charge with a card but cannot capture the payment. (Credit Card Lingo 101: an authorization is sometimes called a "hold" and checks if a card is valid and 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 the payment processor.)
- **Duplicate Charge Detected** — Sent if a member tries to pay the same amount twice in a short period. Guardrails on the invoice payment page and in the Info Hub usually prevent this, 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 Contact → Billing tab → Actions 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.

Article: [Generate Invoices for Upcoming (Recurring) Billing]()

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

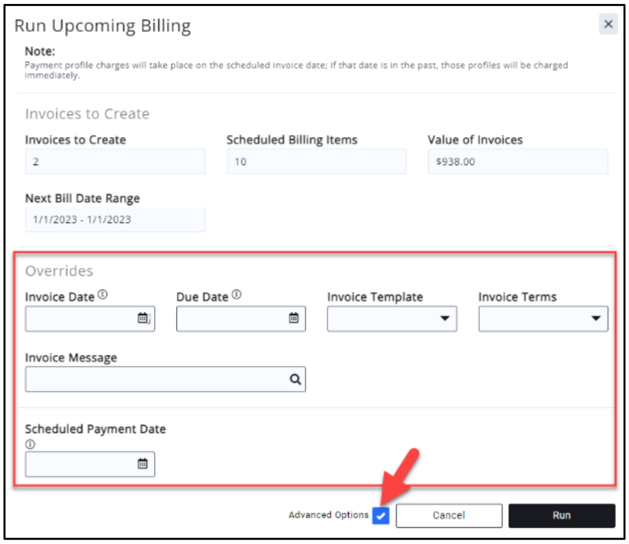
5.1 – Filtering Scheduled Billing Items

Click the *Customize Results* button to filter to the memberships you want to generate invoices for.

- Set the **Month** dropdown to *January – 2024*.
- 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), on the Upcoming Billing tab you'll still see the old pricing in the amount column. An icon next to the amount indicates the price will change. The effective date pricing will be used when you run billing.*

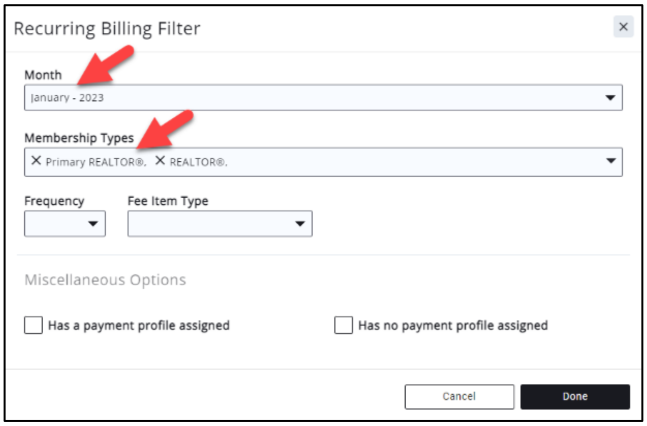


TIP: Start by generating an invoice for just one member by searching for them on the Upcoming Billing tab. Running the billing for a small subset allows you to review the invoice prior to running it for all members.

5.2 – Generate Invoices

Click the Actions button and choose *Run Upcoming Billing*. A few fields to set on this screen:

- Enable the **Advanced Options** checkbox.
- Set your desired **Invoice Date** (example: 10/1/2023).
- Set your desired **Due Date** (example: 11/1/2023).
- Set your desired **Scheduled Payment Date** (example: 11/1/2023). *This is when members with saved credit cards will be charged for their association dues.*
- Select the **Invoice Template** you created or reviewed earlier.
  - Click **Run** to generate your invoices.



For more instructions, visit [Generate Invoices for Upcoming (Recurring) Billing] in our Knowledge Base.

6. Deliver Invoices

Once invoices have been generated, deliver them from the Sales/Invoices tab in the Billing module. Members who have saved a credit card for dues billing will receive an invoice noting that their card will be charged on the Scheduled Payment Date you selected when running billing. All other members will receive a traditional invoice.

Articles: [Deliver Invoices Pending Delivery] and/or [Deliver Renewal Invoices]

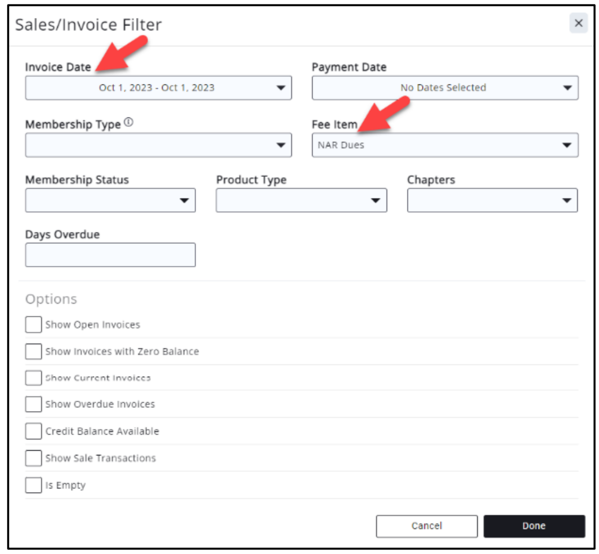
In-app guide available, under the "Need Help?" tab.

Note: we recommend using 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

To deliver the newly generated invoices, go to the Sales/Invoices tab and customize your filters:

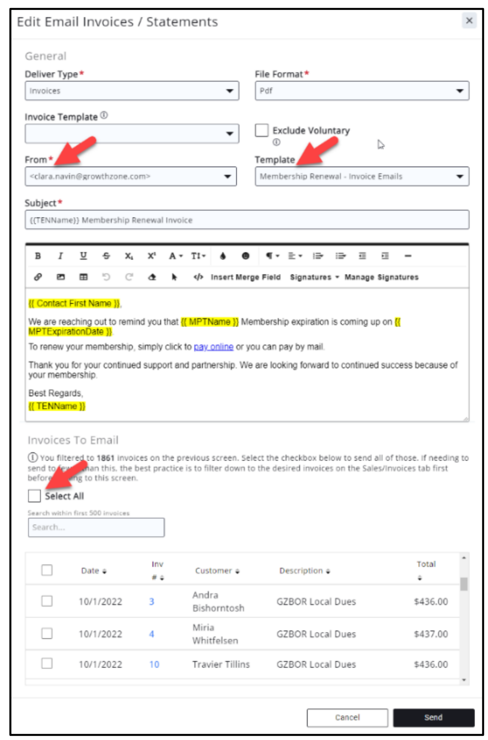
- Set the **Invoice Date** to 10/1/2023 (or the date your association desires).
- Set the **Fee Item** to be one of the line items of your membership. This will include all your membership dues invoices but exclude any other invoices created with the same invoice date.



6.2 – Email Invoices

After filtering the invoices, prepare to send them by clicking Actions and selecting *Email Invoices/Statements*.

- Set the **Template** field to the email template you previously created.
- Set the **From** email address where you'd like to receive billing questions or notices about bounced emails.
- 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.



Resources For After You Run Your Billing

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