Manage Unpaid Dues Invoices



Suggested Workflow

- View/Resend Invoices
- View Unpaid Invoices
- Add Late Fees
- Resend Invoices
- View Unpaid Invoices
- Send Notification the Membership will be Dropped
- Drop Members



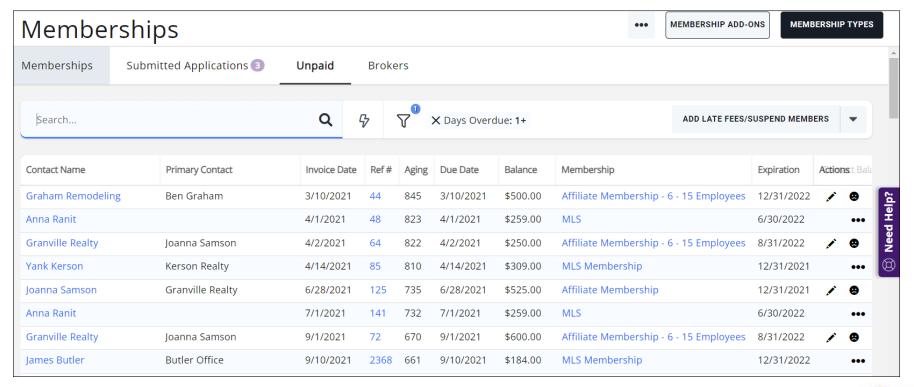
Plan Ahead

- 1. Define your process:
 - When do you resend overdue invoices
 - If applicable, when do you add late fees
 - If applicable, when do you add reactivation fees
 - When do you drop your members
- 2. What email templates do you need:
 - Template to be used for resending invoices
 - Template to be used when notifying the member that they have been dropped
- 3. Will you apply late fees and/or reactivation fees?
 - Create late fee Goods/Service
 - Create reactivation fee Goods/Service



Identify Overdue Membership Invoices

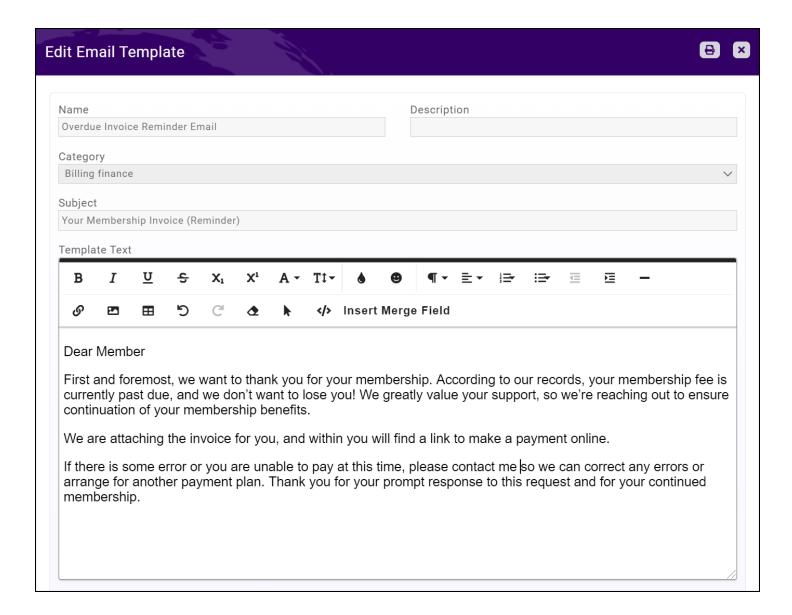
Within the Membership module, you will find the Unpaid tab. On this tab you will be able to review invoices for memberships and resend them





Resend Overdue Membership Invoices

• Your GrowthZone software allows you to easily identify over-due membership invoices, and the ability to resend them. Dependent on your processes, you may wish to resend invoices with a gentle reminder. Create an email template specific for this use



Add Late Fees to Unpaid Invoices

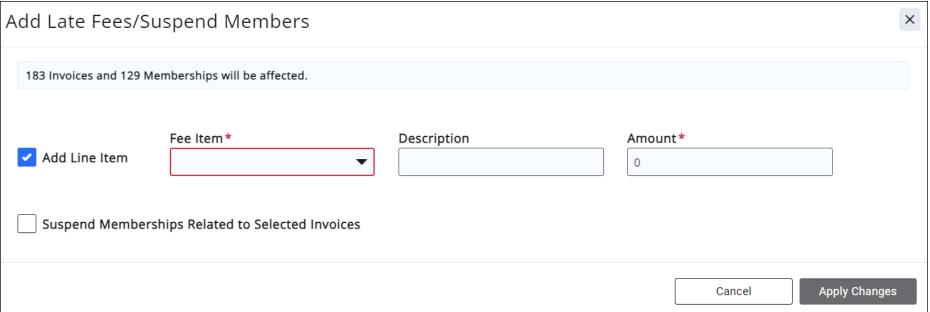
- If you choose to add late fees:
 - A fee item of type "Late Fee" must be setup
 - Only the following recognition types are allowed:
 - Cash basis
 - Fully on Paid Date
 - Fully on Invoice Date



Add Late Fees to Unpaid Invoices

The late fee will have a transaction date of the current date, so you don't impact previously closed accounting periods

KB: Add Late Fees to Overdue Invoices





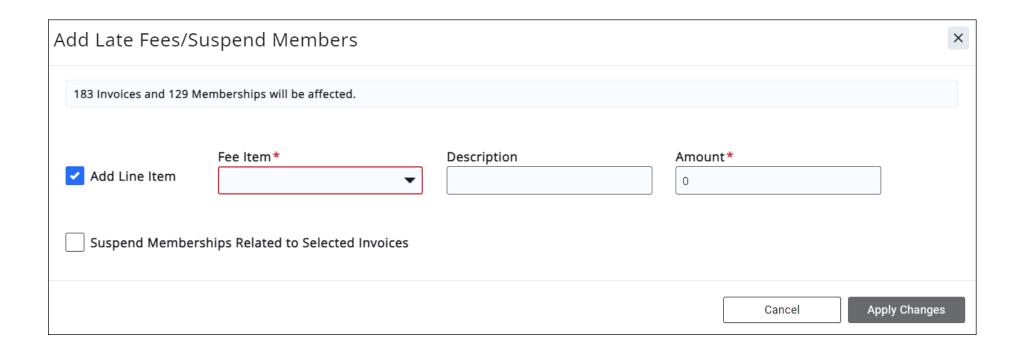
Add Reactivation Fees to Unpaid Invoices

- A fee item of type must be setup (of type: Late Fee)
- Only the following recognition types are allowed:
 - Cash basis
 - Fully on Paid Date
 - Fully on Invoice Date
- When added to an invoice, the fee item will have a transaction date of the current date, so as to not impact previously closed accounting periods



Add Reactivation Fees to Unpaid Invoices

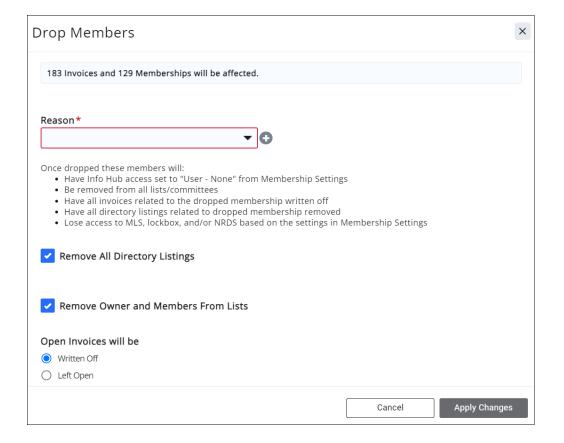
KB: Add Reactivation Fee to Unpaid Invoice





Mass Drop Members

- Unfortunately, there will be times that you simply need to drop a member for nonpayment. Can be done manually or in bulk
- KB: Mass Drop Members





Questions?

