

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

Memberships MEMBERSHIP ADD-ONS MEMBERSHIP TYPES

Memberships Submitted Applications 3 **Unpaid** Brokers

Search... Days Overdue: 1+ ADD LATE FEES/SUSPEND MEMBERS

Contact Name	Primary Contact	Invoice Date	Ref #	Aging	Due Date	Balance	Membership	Expiration	Actions
Graham Remodeling	Ben Graham	3/10/2021	44	845	3/10/2021	\$500.00	Affiliate Membership - 6 - 15 Employees	12/31/2022	
Anna Ranit		4/1/2021	48	823	4/1/2021	\$259.00	MLS	6/30/2022	
Granville Realty	Joanna Samson	4/2/2021	64	822	4/2/2021	\$250.00	Affiliate Membership - 6 - 15 Employees	8/31/2022	
Yank Kerson	Kerson Realty	4/14/2021	85	810	4/14/2021	\$309.00	MLS Membership	12/31/2021	
Joanna Samson	Granville Realty	6/28/2021	125	735	6/28/2021	\$525.00	Affiliate Membership	12/31/2021	
Anna Ranit		7/1/2021	141	732	7/1/2021	\$259.00	MLS	6/30/2022	
Granville Realty	Joanna Samson	9/1/2021	72	670	9/1/2021	\$600.00	Affiliate Membership - 6 - 15 Employees	8/31/2022	
James Butler	Butler Office	9/10/2021	2368	661	9/10/2021	\$184.00	MLS Membership	12/31/2022	

Need Help?

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

Edit Email Template

Name: Overdue Invoice Reminder Email

Description:

Category: Billing finance

Subject: Your Membership Invoice (Reminder)

Template Text

B I U S X₁ X¹ A T_↑ [Icons: Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Font Color, Font Size, Text Color, Background Color, Font Color, Font Size, Font Style, Font Weight, Font Color, Font Size, Font Style, Font Weight]

[Icons: Link, Image, Table, Undo, Redo, Up Arrow, Down Arrow, Code] **Insert Merge Field**

Dear Member

First and foremost, we want to thank you for your membership. According to our records, your membership fee is currently past due, and we don't want to lose you! We greatly value your support, so we're reaching out to ensure continuation of your membership benefits.

We are attaching the invoice for you, and within you will find a link to make a payment online.

If there is some error or you are unable to pay at this time, please contact me so we can correct any errors or arrange for another payment plan. Thank you for your prompt response to this request and for your continued membership.

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 Late Fees/Suspend Members ×

183 Invoices and 129 Memberships will be affected.

<input checked="" type="checkbox"/> Add Line Item	Fee Item* <input type="text"/>	Description <input type="text"/>	Amount* <input type="text" value="0"/>
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Suspend Memberships Related to Selected 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](#)

Add Late Fees/Suspend Members ×

183 Invoices and 129 Memberships will be affected.

<input checked="" type="checkbox"/> Add Line Item	Fee Item* <input type="text"/>	Description <input type="text"/>	Amount* <input type="text" value="0"/>
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Suspend Memberships Related to Selected Invoices

Mass Drop Members

- Unfortunately, there will be times that you simply need to drop a member for non-payment. Can be done manually or in bulk
- KB: [Mass Drop Members](#)

Drop Members

183 Invoices and 129 Memberships will be affected.

Reason *

Once dropped these members will:

- Have Info Hub access set to "User - None" from Membership Settings
- Be removed from all lists/committees
- Have all invoices related to the dropped membership written off
- Have all directory listings related to dropped membership removed
- Lose access to MLS, lockbox, and/or NRDS based on the settings in Membership Settings

Remove All Directory Listings

Remove Owner and Members From Lists

Open Invoices will be

Written Off

Left Open

Cancel Apply Changes

Questions?