Billing: Managing Items

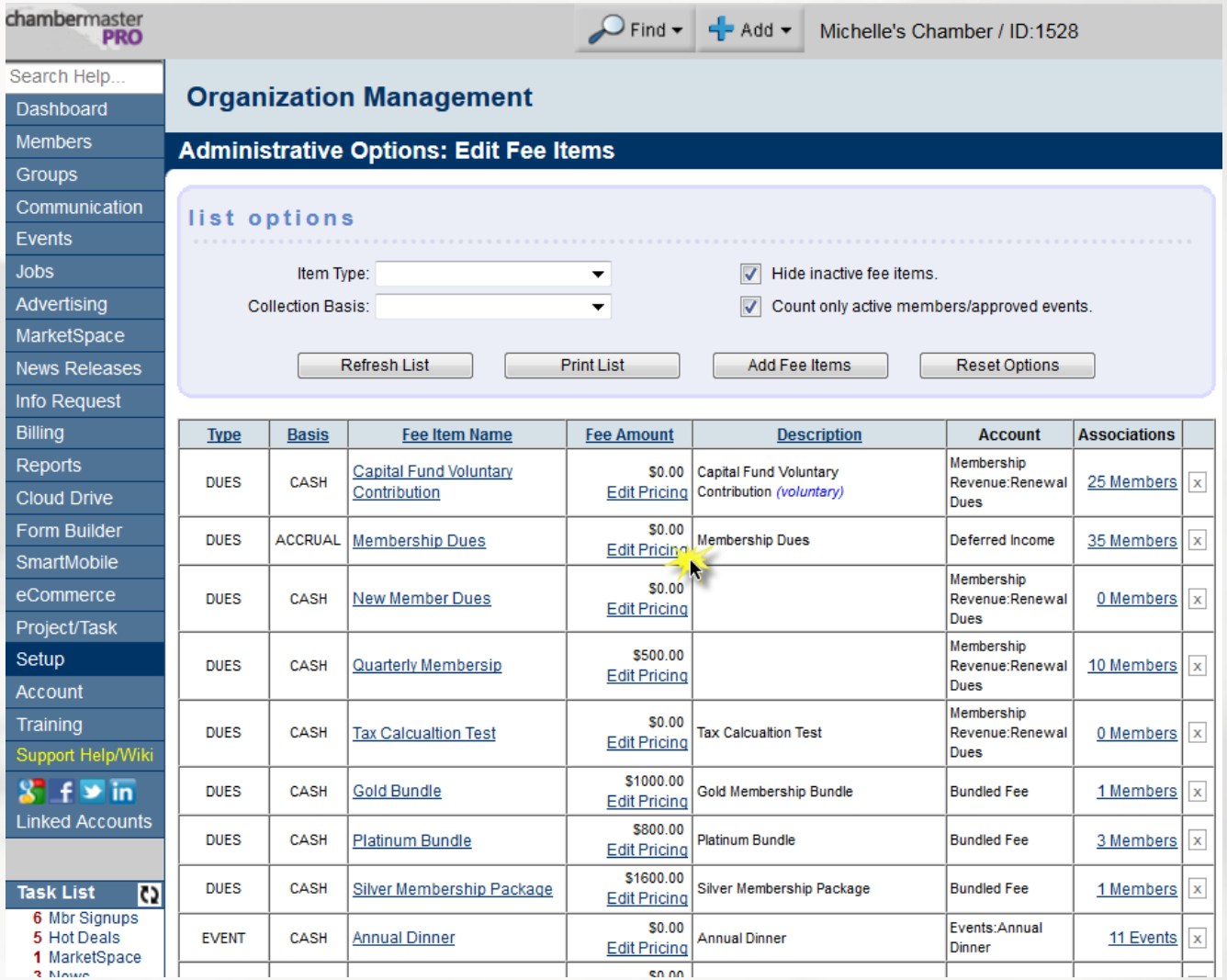
Rate Increases, Description Updates, and Member Assignments

Rate adjustments

- Adjust default rate
- Increase/Decrease member amounts
  - Percentage or flat amount
  - All members or by renewal month

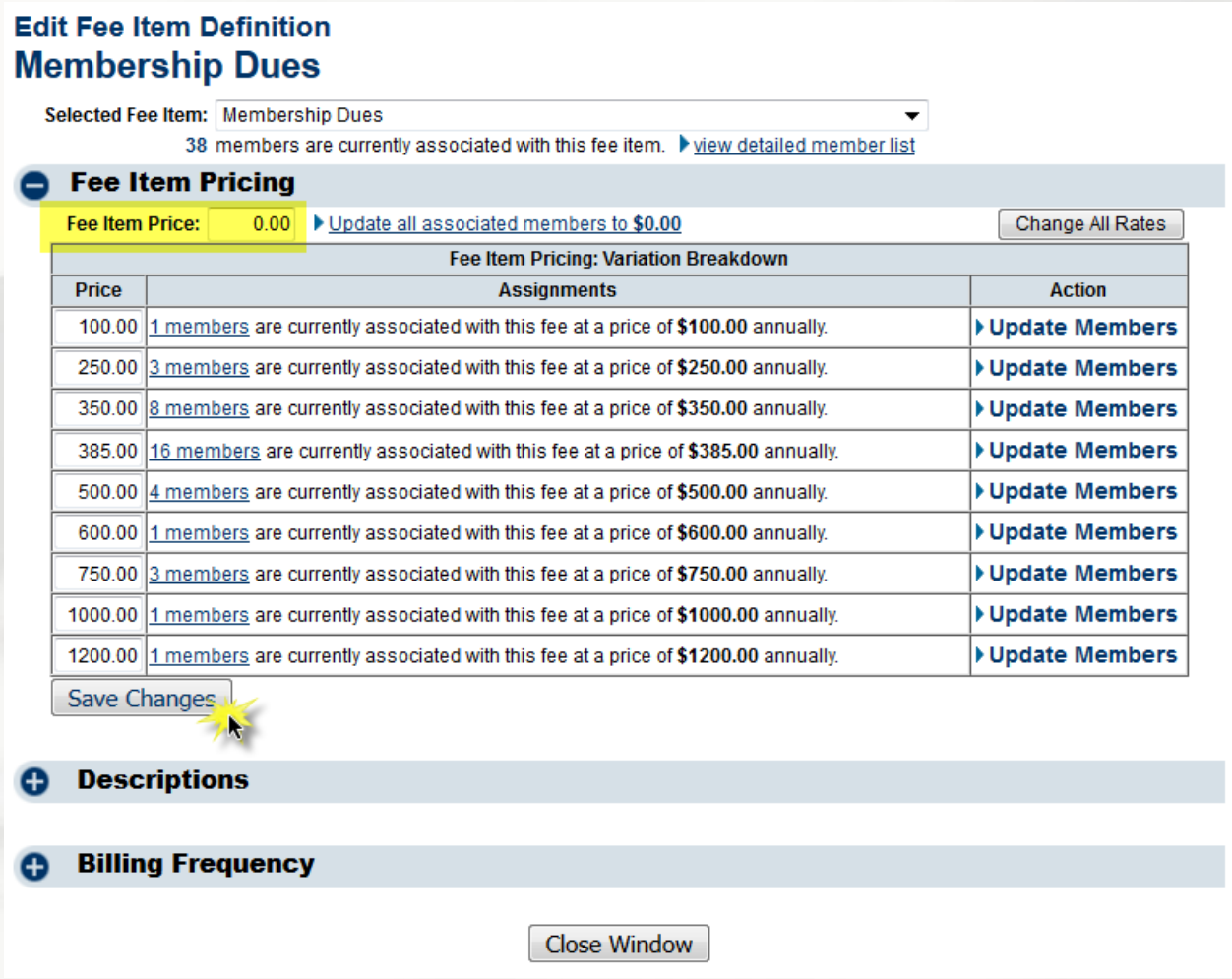
Setup->Billing->Fee Items List

- Click ‘Edit Pricing’ for the item that needs to be adjusted



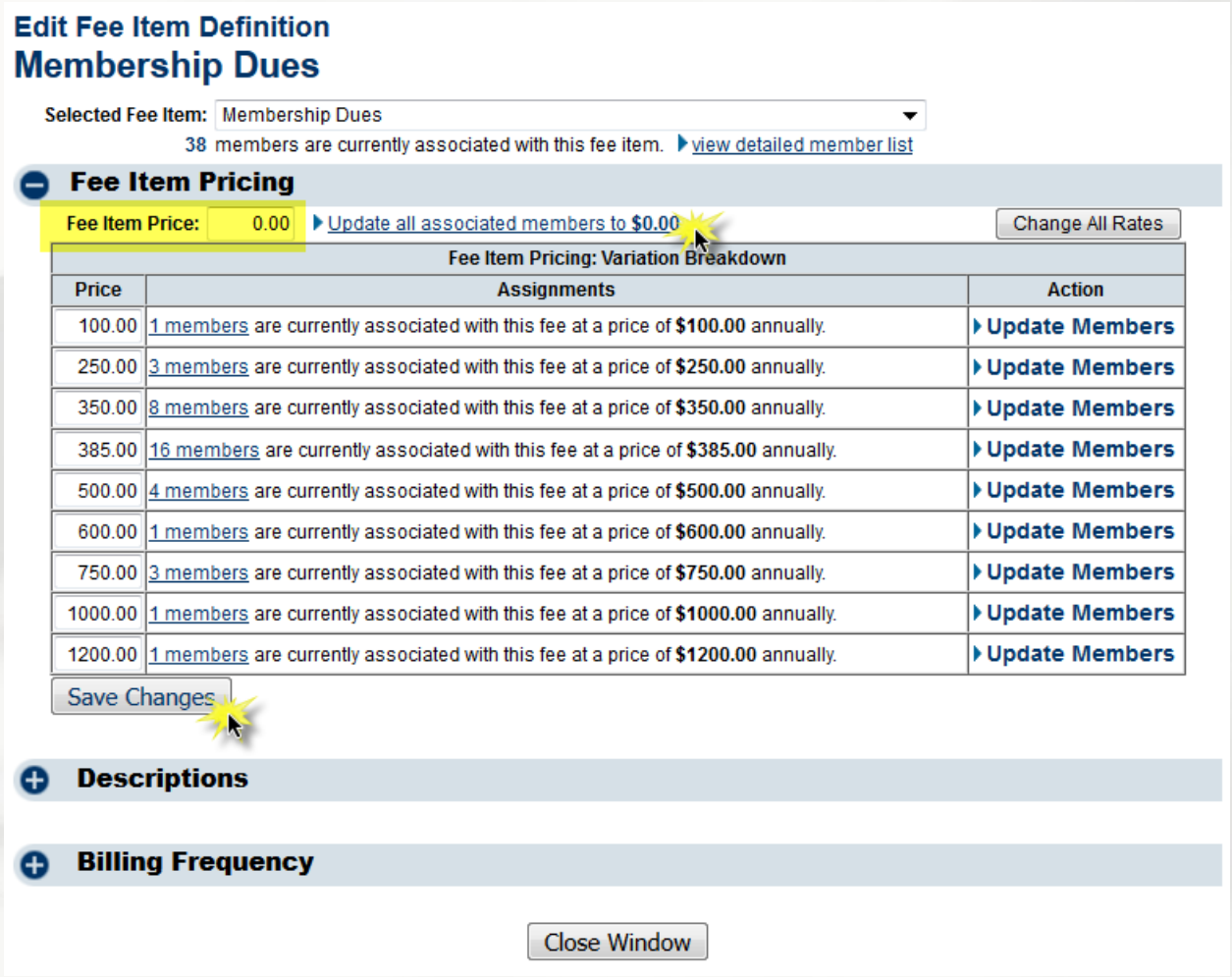
- Update the default rate ONLY
  - ✓Enter the new default rate in the Fee Item Price field
  - ✓Click ‘Save Changes’

NOTE: This will only affect the rate when the item is used going forward.



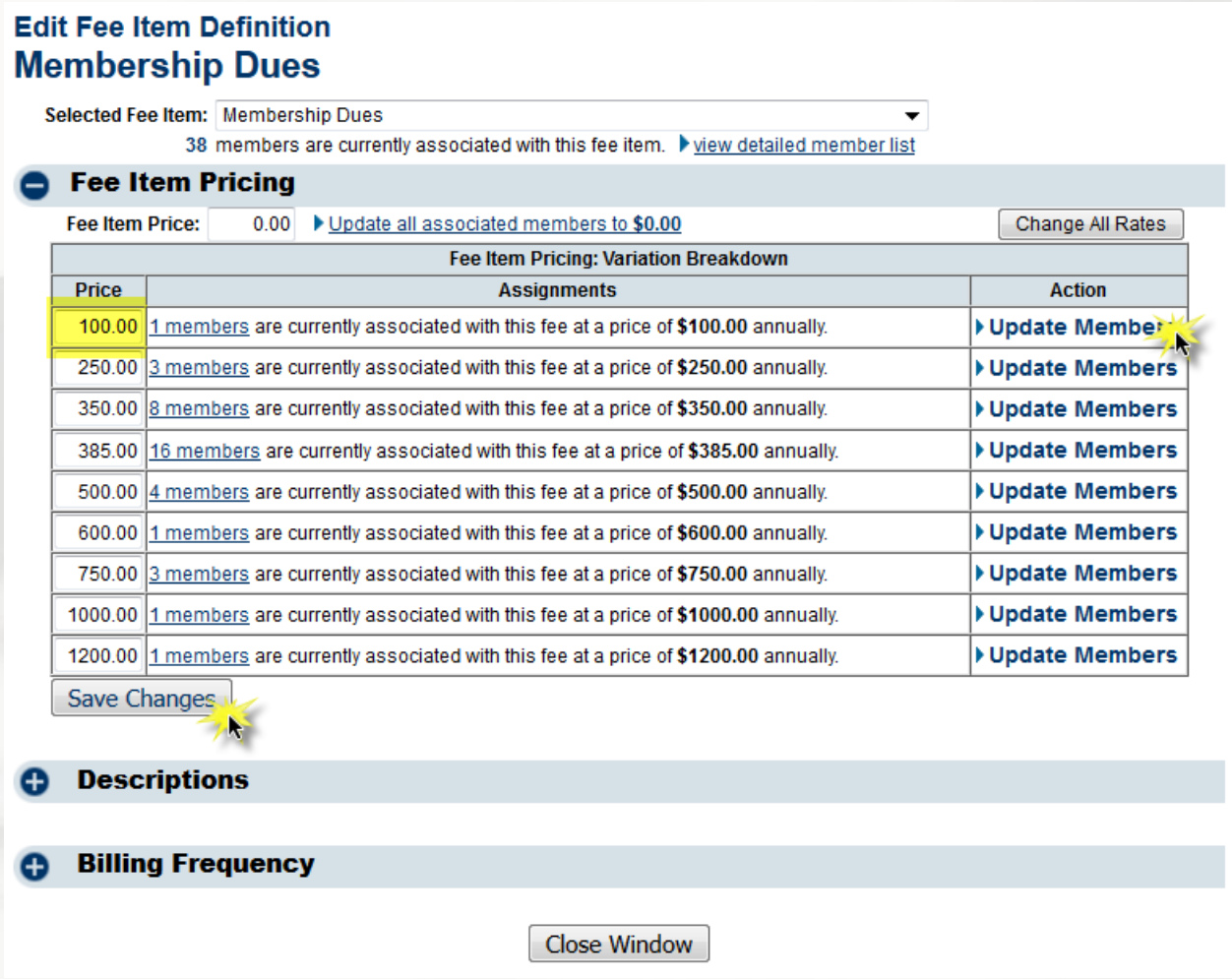
- Update the default rate and all associated member rates
  - ✓ Enter the new default rate in the Fee Item Price field
  - ✓ Click ‘Update all associated members to $X.XX’
  - ✓ Click ‘Save Changes’
  - ✓ Click ‘Close Window’

NOTE: This will change the default amount and ALL current member rates. If there are different levels (as shown here), this will change everything. DO NOT USE THIS OPTION IF MEMBERS ARE SET TO ANYTHING OTHER THAN AN ANNUAL FREQUENCY BILLING.



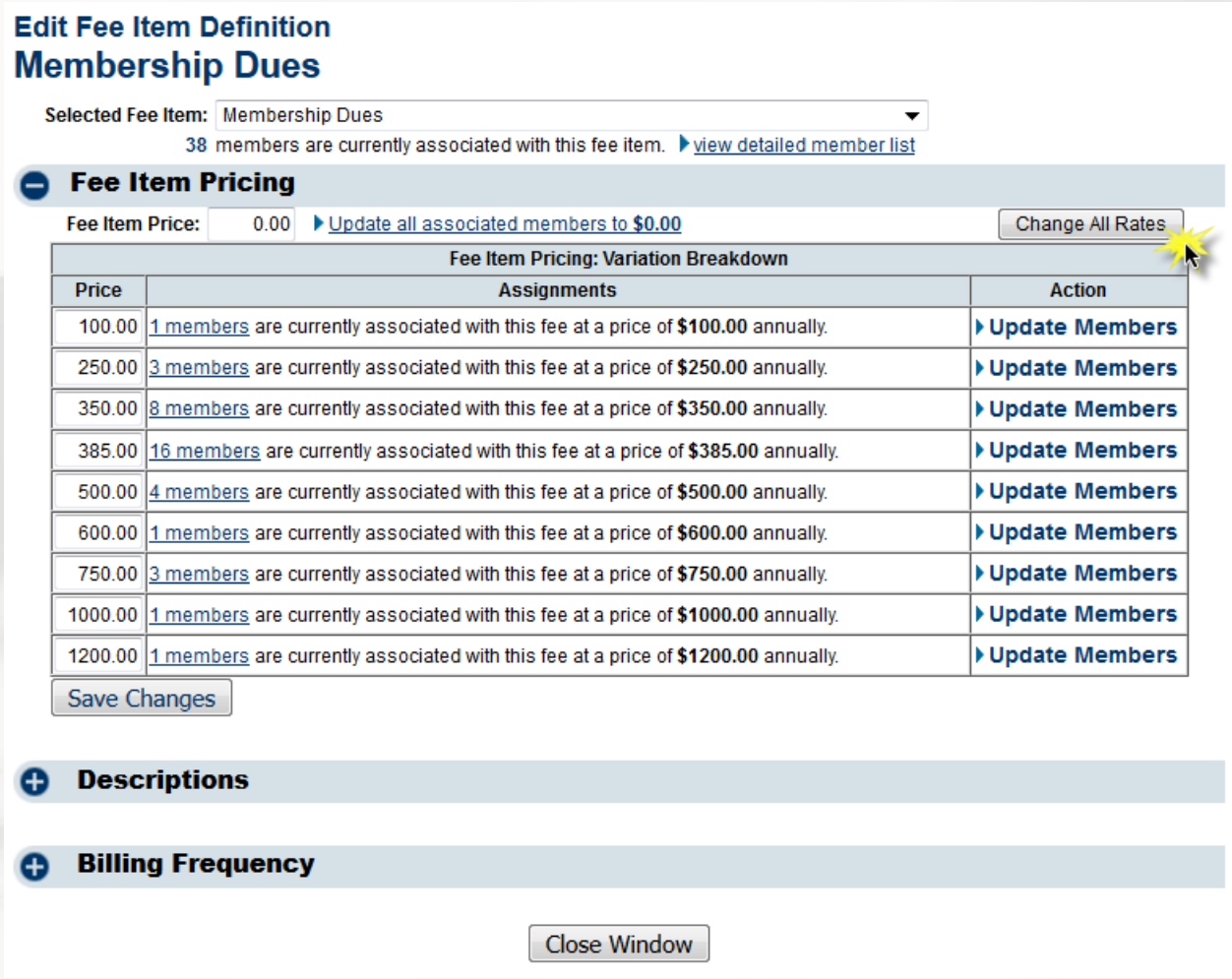
- Update rates by level
  - ✓Enter the new amount in the Price column
  - ✓Click ‘Update Members’ under the Action column
  - ✓Click ‘Save Changes’

NOTE: The default rate is typically a $0.00 rate in this instance. Rate is entered at the time the item is assigned or used. DO NOT USE THIS OPTION IF MEMBERS ARE SET TO ANYTHING OTHER THAN AN ANNUAL FREQUENCY BILLING.



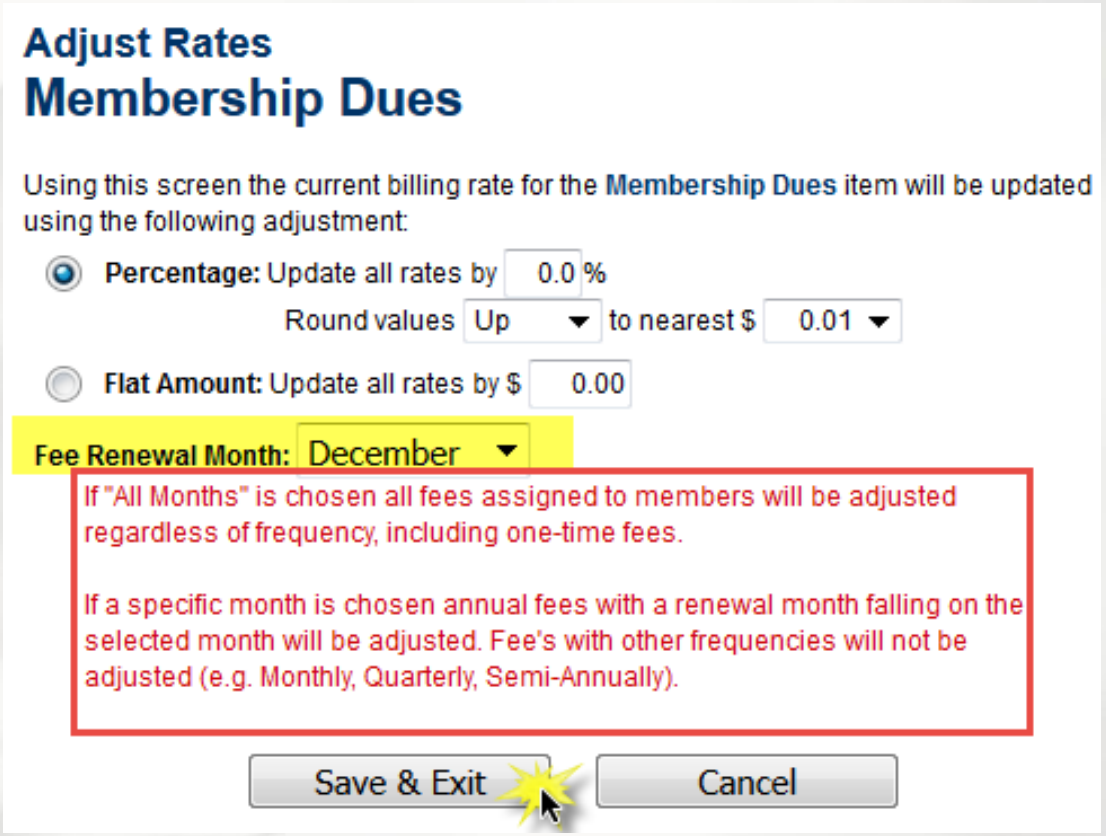
- Update rates by percentage or flat amount
  - ✓Click ‘Change All Rates’

NOTE: This option is recommended when billing frequencies other than ANNUAL are used (monthly, quarterly, semi-annual).



- Select to adjust rates by either a percentage or flat amount
- If members have billing frequencies other than Annual, choose the renewal month of the billing batch that will be completed next. If all members are set to an Annual frequency select ‘All Months’ from the drop-down.
- Click ‘Save & Exit’

NOTE: Any members that have billing frequencies other than Annual will need to have their rates adjusted separately.

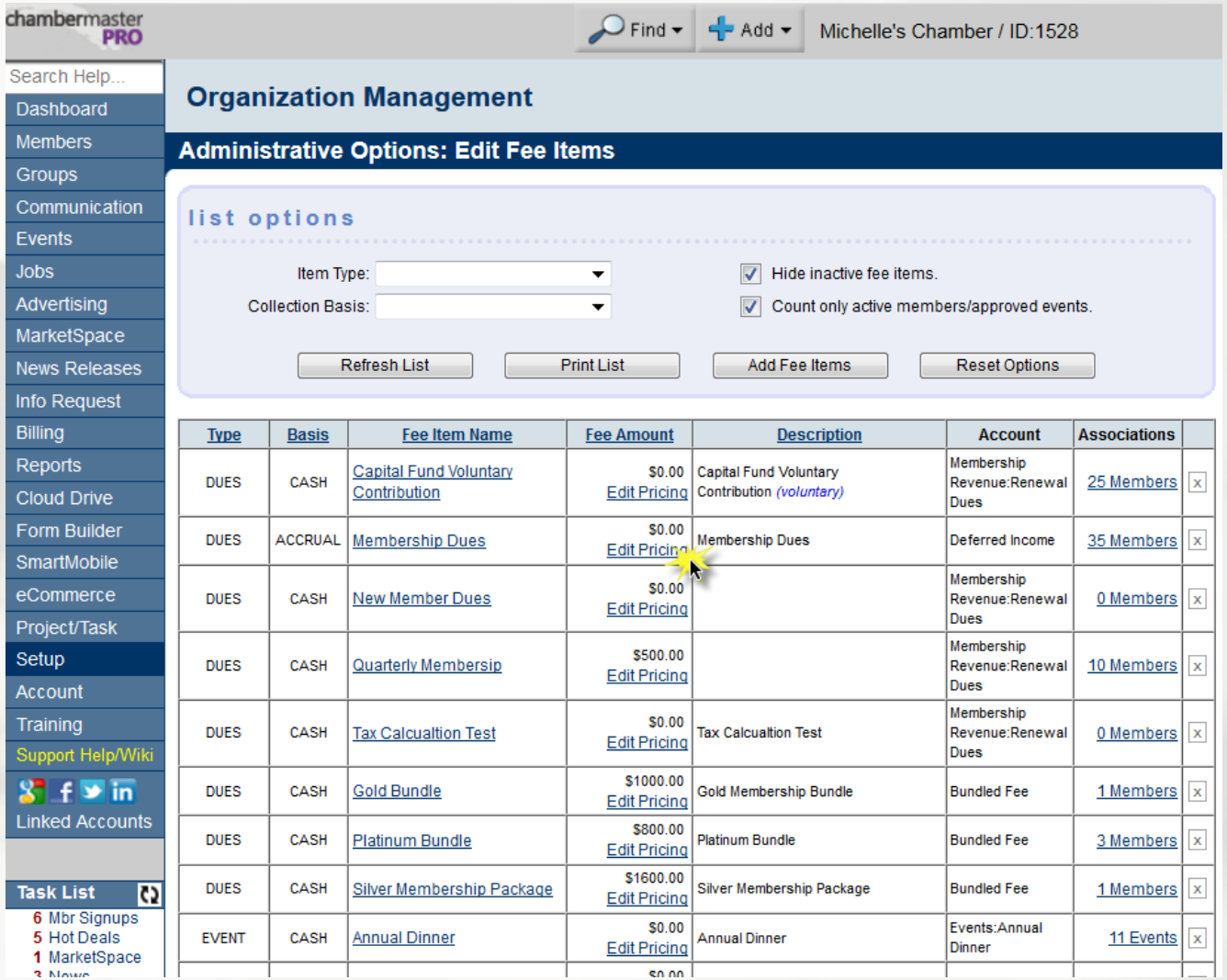


Description Updates

- Adjust default description
- Update description for fees already assigned to a member

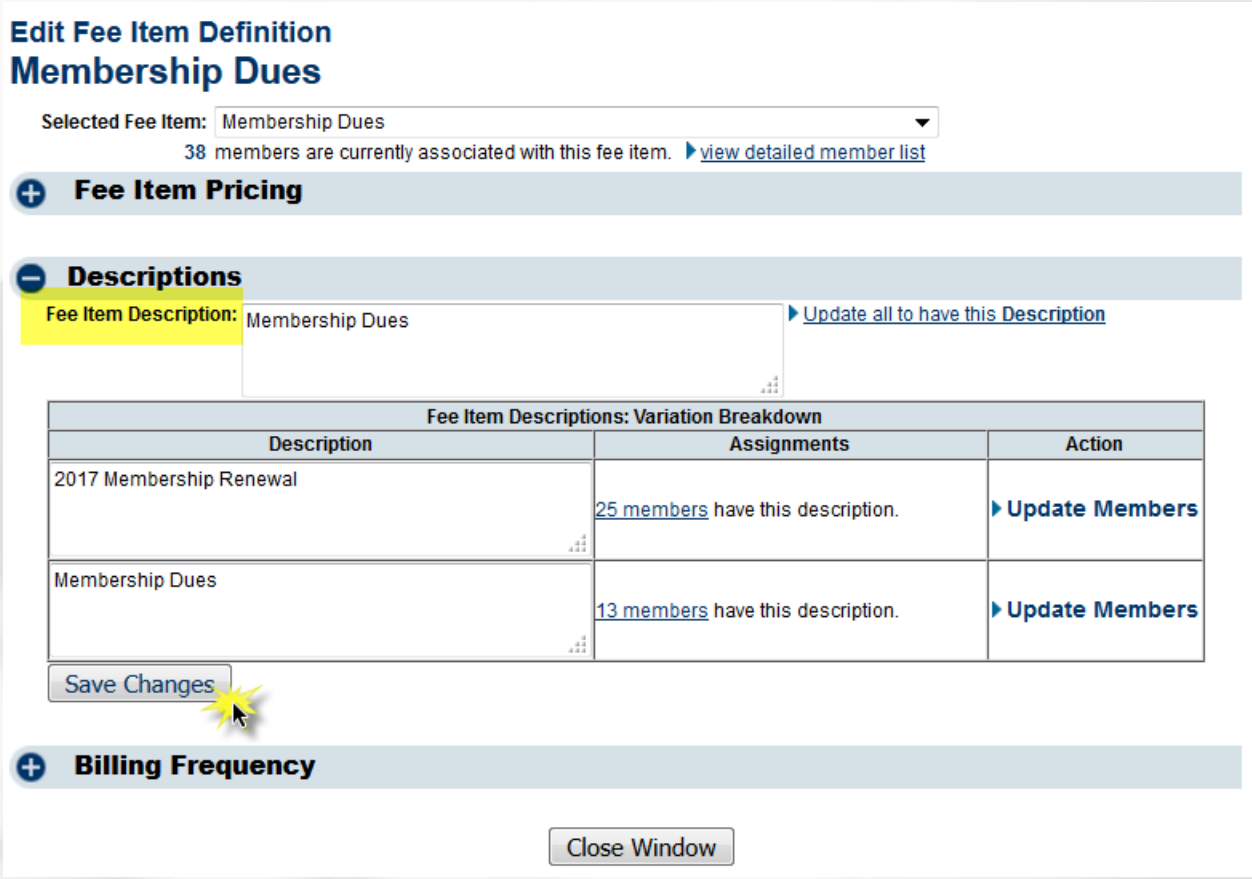
Setup->Billing->Fee Items List

- Click ‘Edit Pricing’ for the item that needs to be updated.



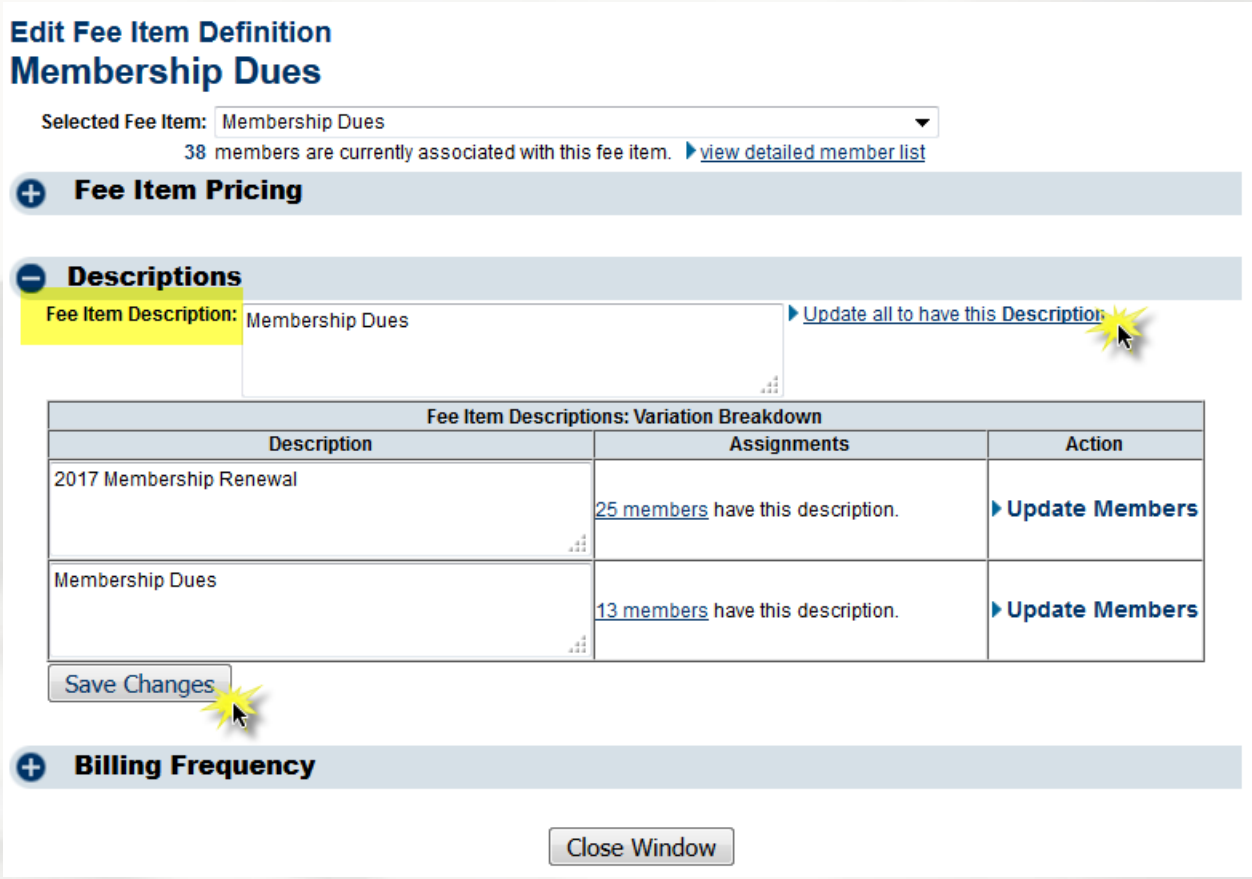
- Update the default description <u>ONLY</u>
  - ✓Enter the new default description in the Fee Item Description field
  - ✓Click ‘Save Changes’

NOTE: This will only affect the description when the item is used going forward.



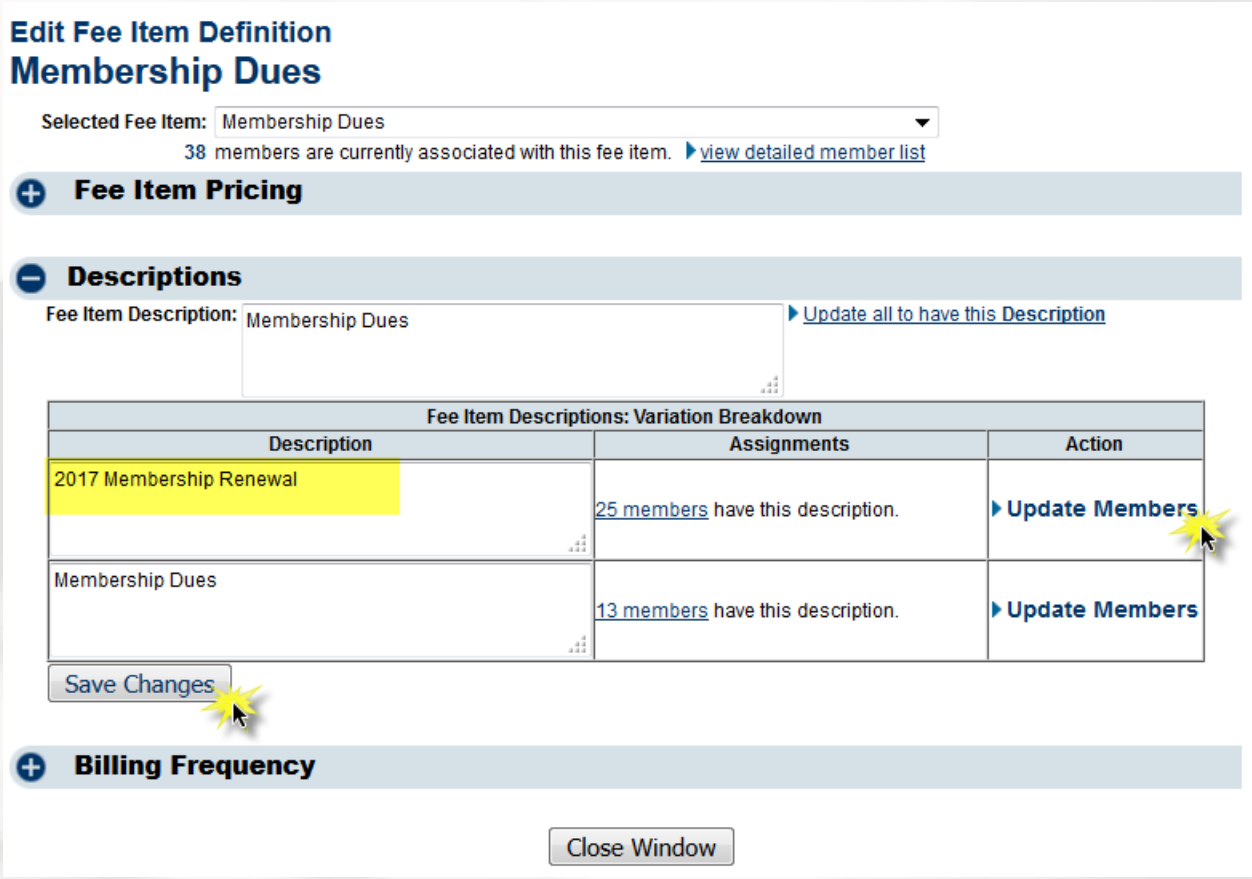
- Update the default description and all associated member descriptions
  - ✓Enter the new default description in the Fee Item Description field
  - ✓Click ‘Update all to have this Description’
  - ✓Click ‘Save Changes’
  - ✓Click ‘Close Window’

NOTE: This will change the default description and ALL current member descriptions. If there are different breakdowns (as shown here), this will change everything.



- Update descriptions by breakdown
  - ✓Enter the new description in the Description column
  - ✓Click ‘Update Members’ under the Action column
  - ✓Click ‘Save Changes’
  - ✓Click ‘Close Window’

NOTE: The default description is typically setup for the majority of use cases in this instance. Description can be altered at the time of assigning to a member.

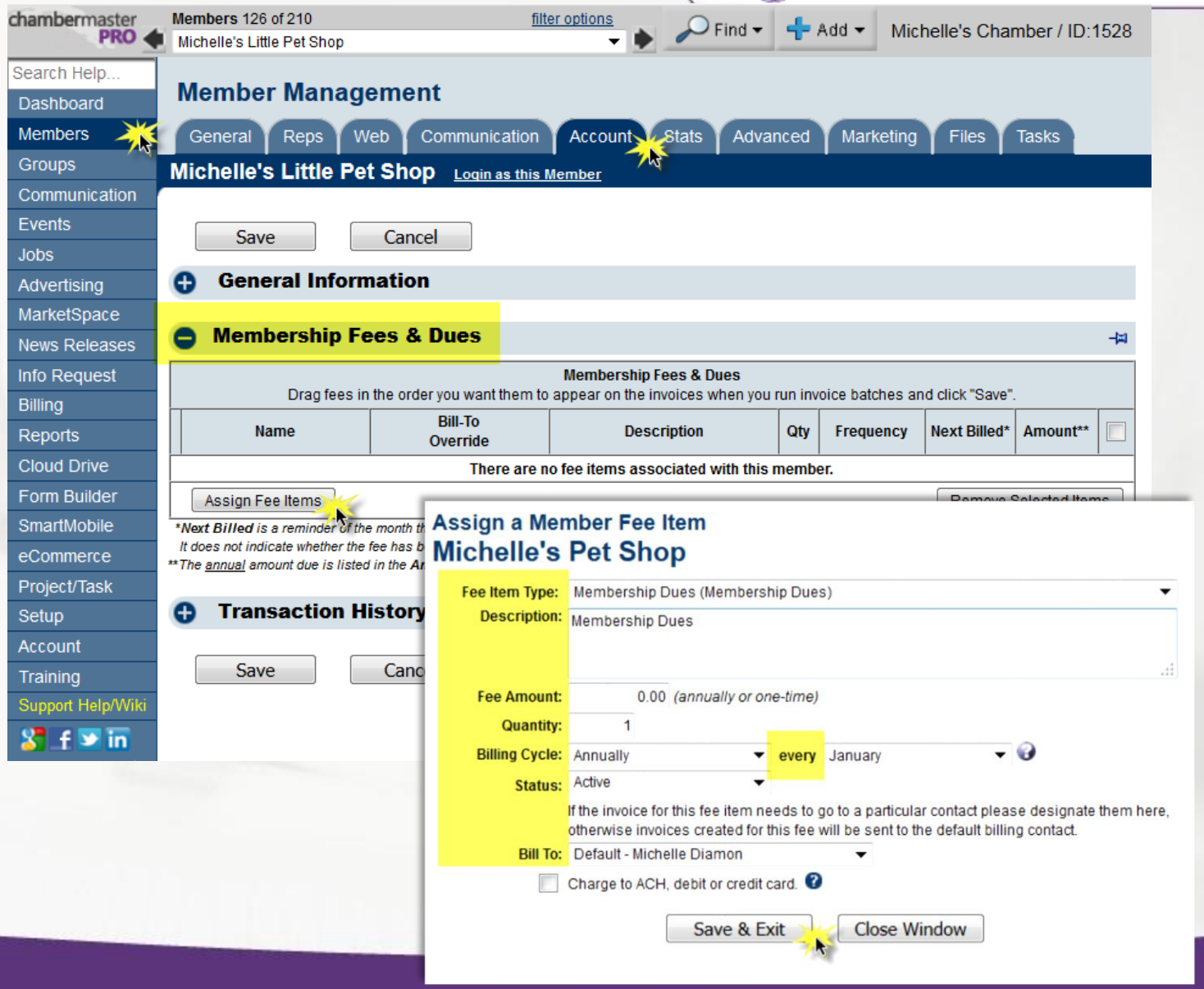


Assign Items to Members for Recurring Billing

- Assign through Members module
  - ✓One member at a time
- Assign through Fee Items List
  - ✓Add to multiple members at once

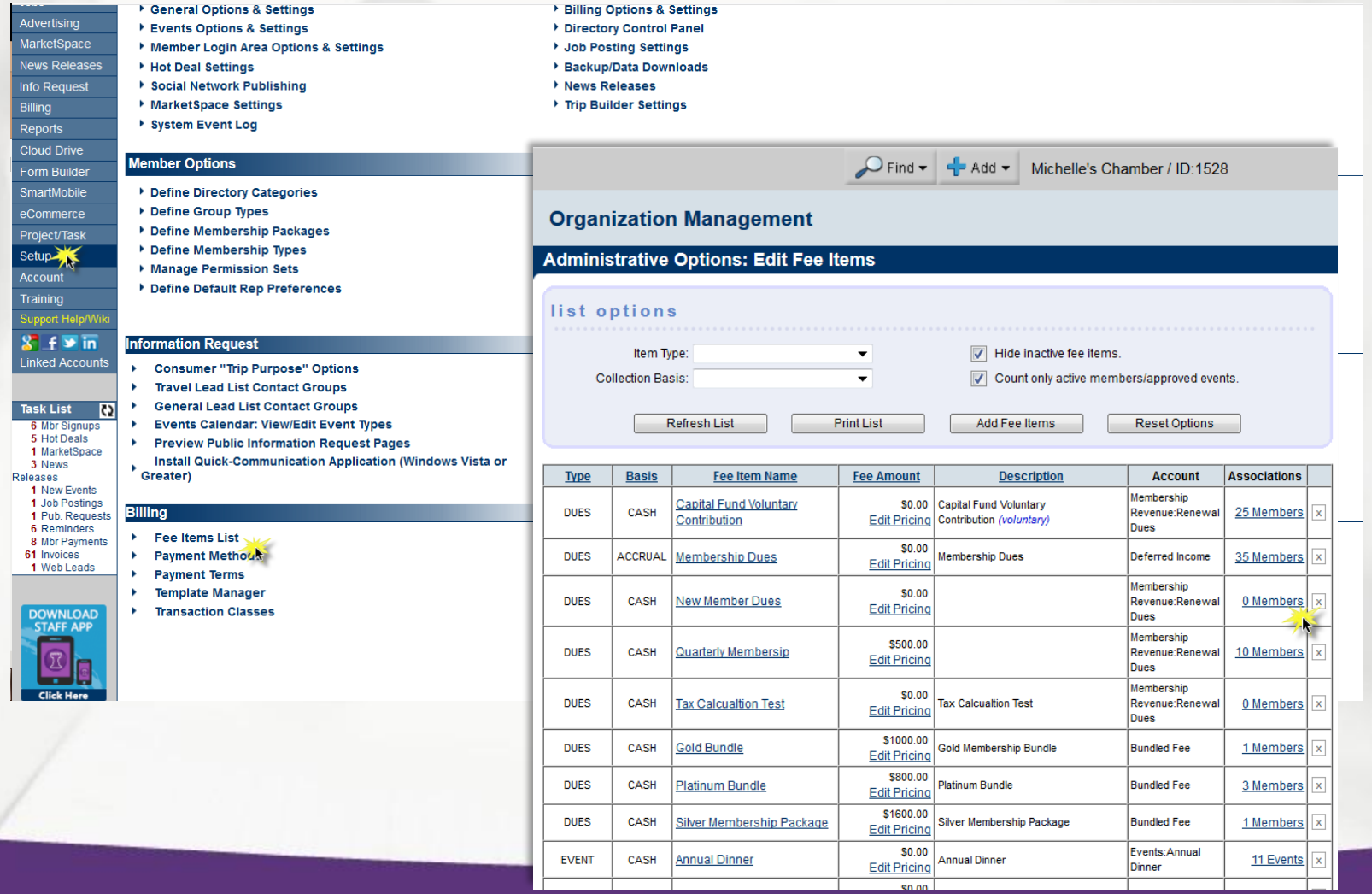
Assign to individual member

- Members->Account->Membership Fees & Dues
  - ✓Assign Fee Items
- Select Fee Item Type from drop-down
- Customize any of the fields as needed
- Save & Exit

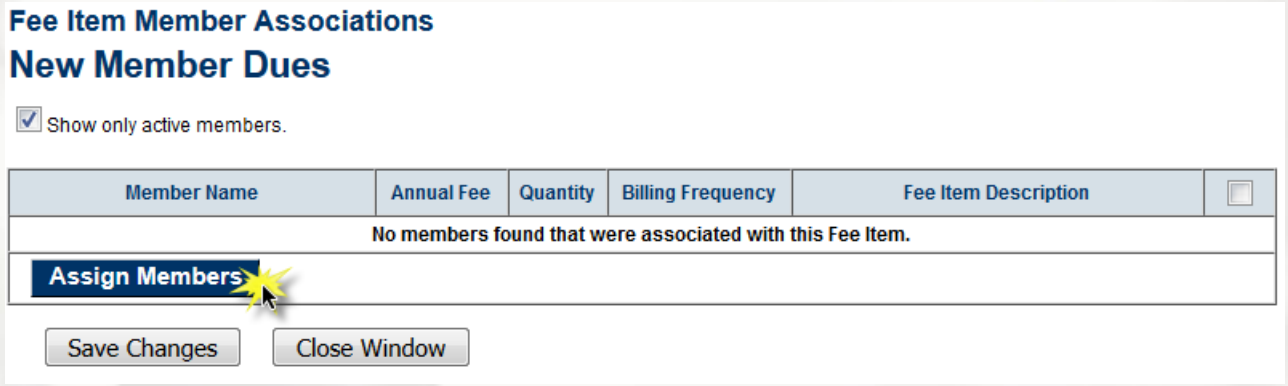


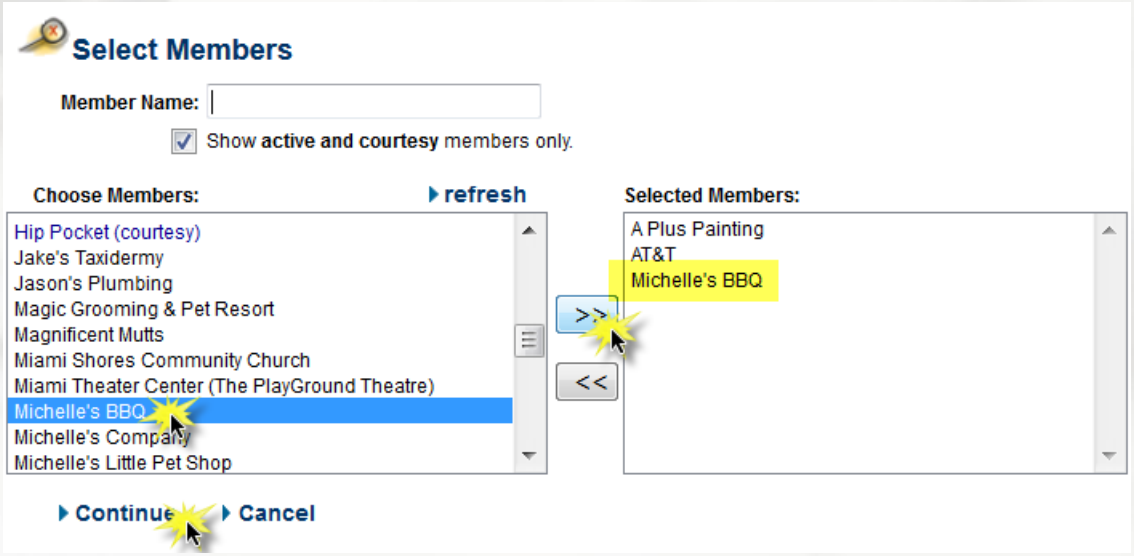
Assign to multiple members

- Setup->Billing->Fee Items List
- Click the Members link under the Associations column

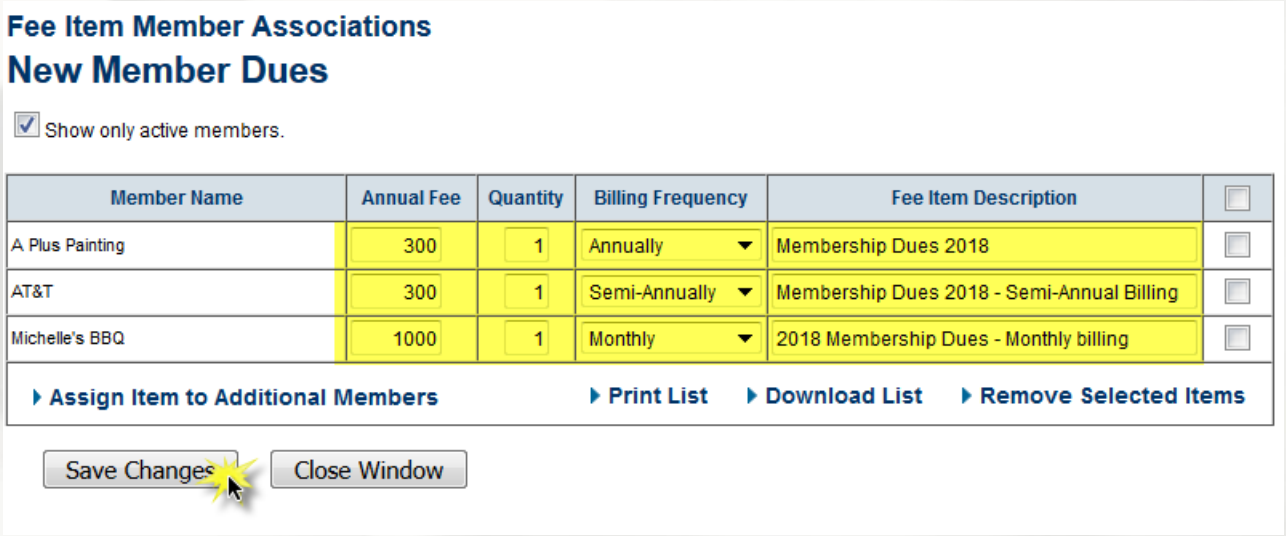


- Click Assign Members
- Select Member
- Click double arrows to move selection to Selected Members
- Once all members are selected click Continue.





- Customize any rates, quantities, billing frequencies, and descriptions
- When finished click Save Changes
- Close Window

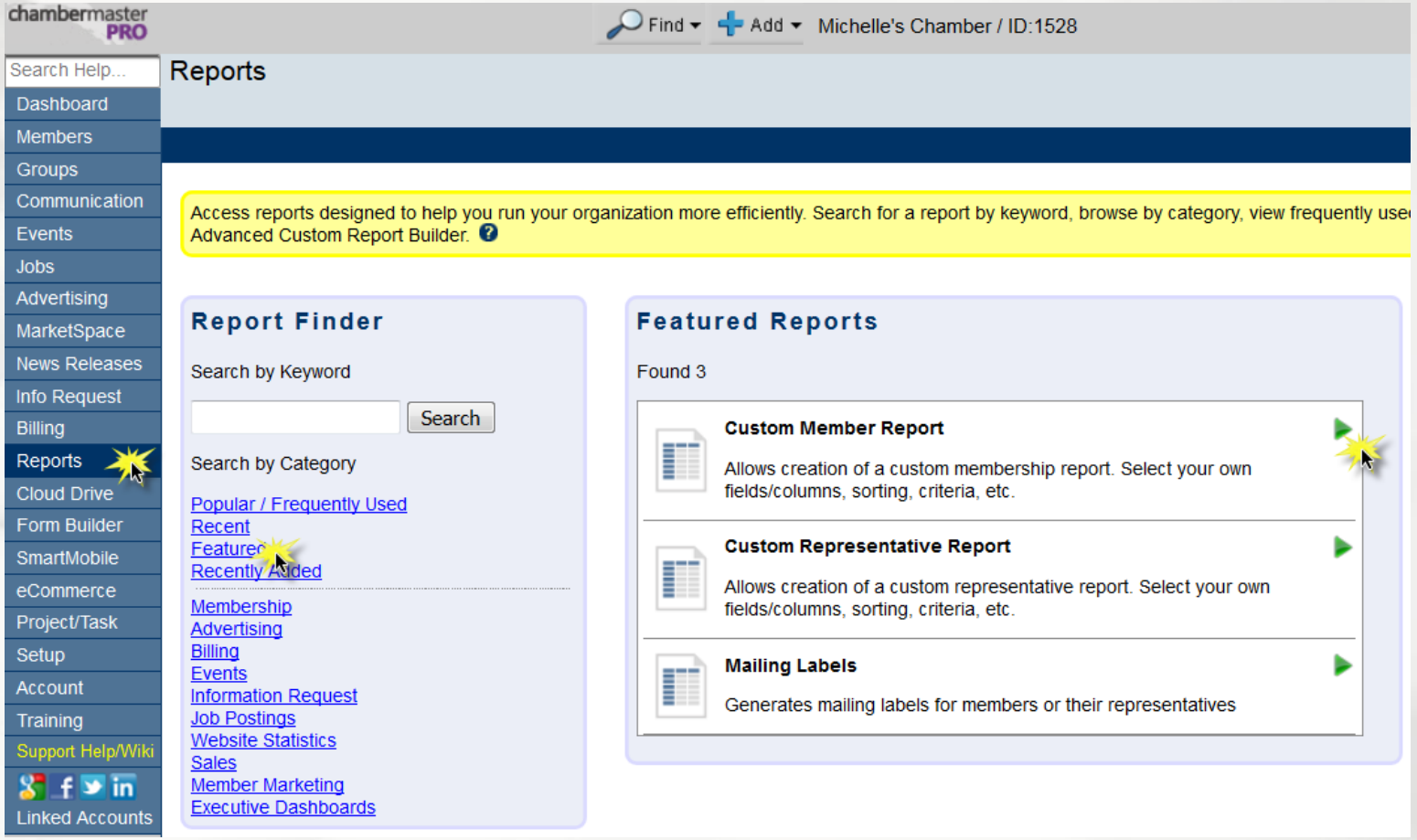


Verify that all Members are set up to be billed

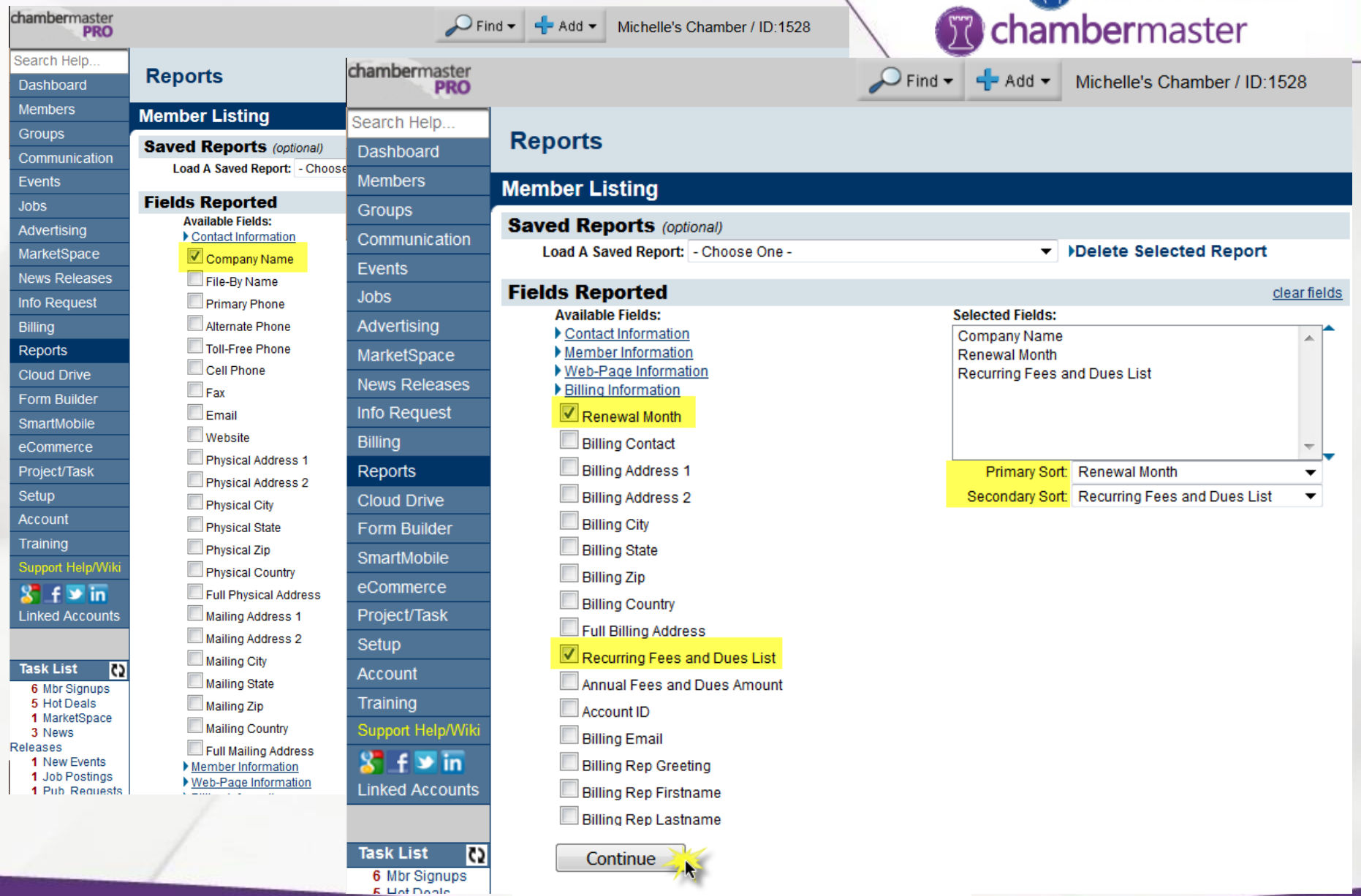
- Do all Members have a renewal month?
- Do all Members have a fee assigned?

Run Custom Member report to confirm renewal months and fee assignments

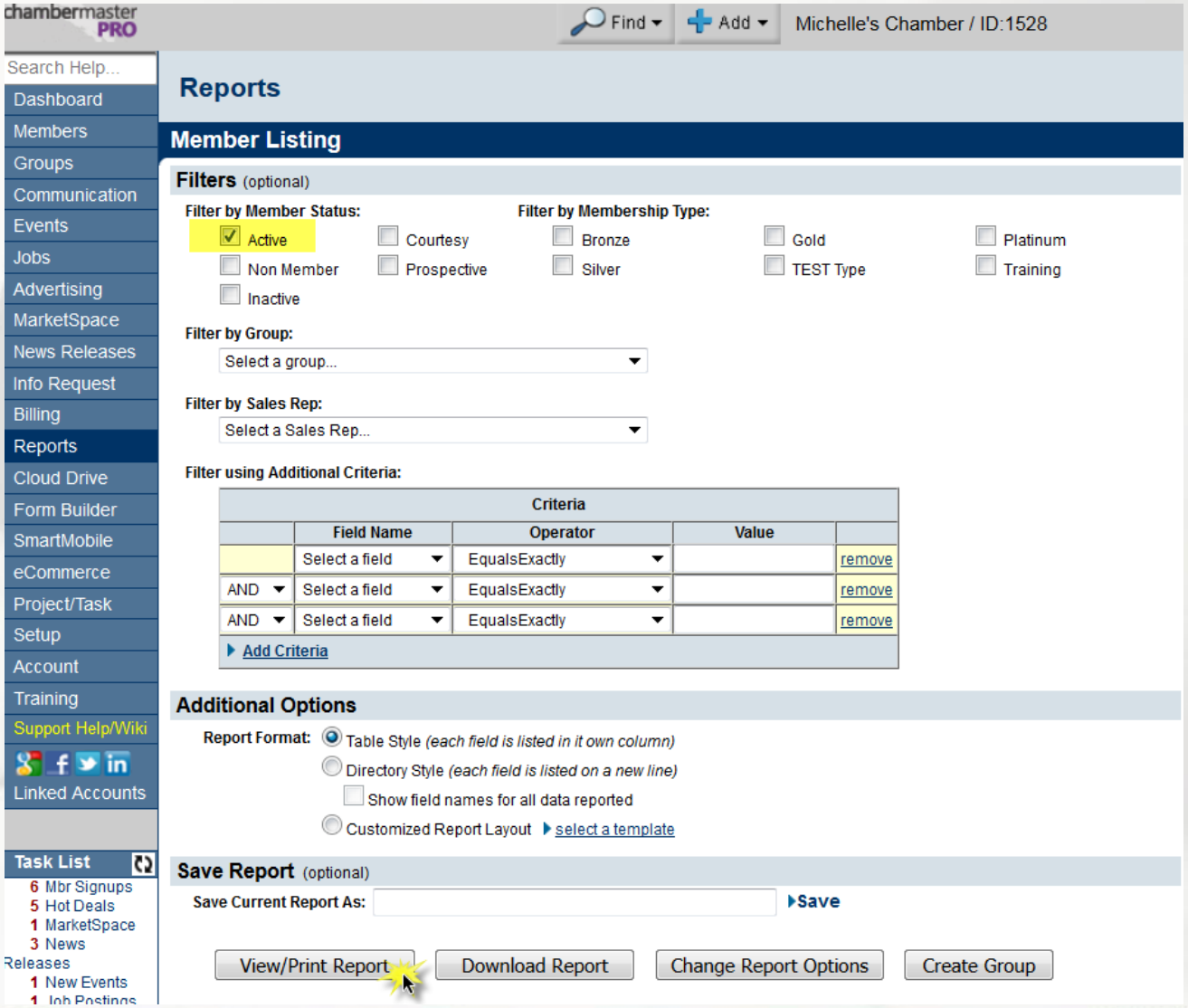
- Reports->Featured->Custom Member Report



- Under Contact Information select ‘Company Name’
- Under Billing Information select ‘Renewal Month’ and ‘Recurring Fees and Dues List’
- Primary Sort = Renewal Month
- Secondary Sort = Recurring Fees and Dues List
- Click ‘Continue’

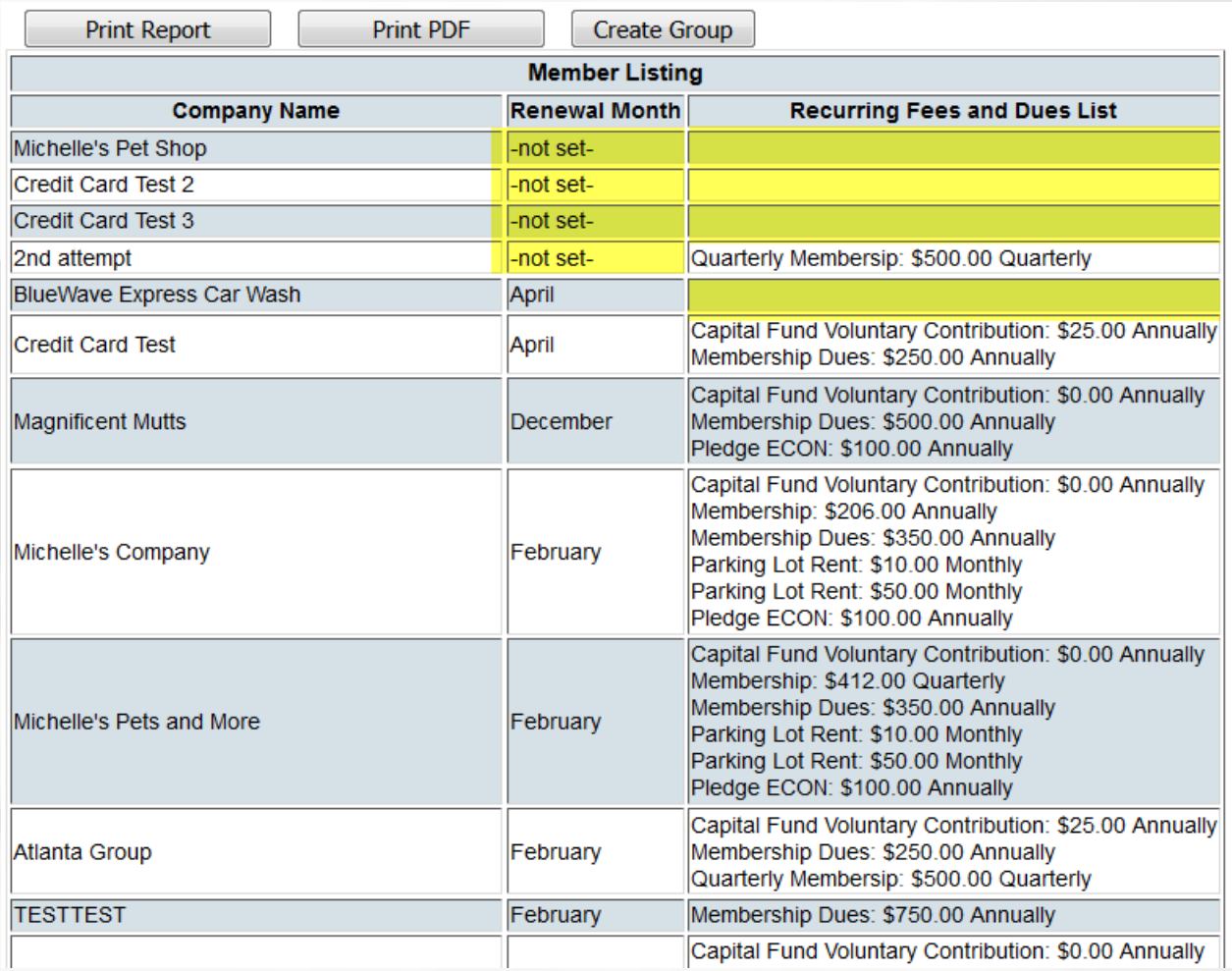


- Filter by Member Status = Active
- Click ‘View/Print Report’ or Download Report to .csv file



- Look for any Renewal Months that are ‘-not set-’
- Look for any missing Recurring Fees and Dues List

NOTE: Report filters can be changed to Primary Sort = Recurring Fees and Dues List to bring all missing item assignments to the top of the list.



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Member Listing

Company Name	Renewal Month	Recurring Fees and Dues List
Michelle's Pet Shop	-not set-	
Credit Card Test 2	-not set-	
Credit Card Test 3	-not set-	
2nd attempt	-not set-	Quarterly Membersip: $500.00 Quarterly
BlueWave Express Car Wash	April	
Credit Card Test	April	Capital Fund Voluntary Contribution: $25.00 Annually Membership Dues: $250.00 Annually
Magnificent Mutts	December	Capital Fund Voluntary Contribution: $0.00 Annually Membership Dues: $500.00 Annually Pledge ECON: $100.00 Annually
Michelle's Company	February	Capital Fund Voluntary Contribution: $0.00 Annually Membership: $206.00 Annually Membership Dues: $350.00 Annually Parking Lot Rent: $10.00 Monthly Parking Lot Rent: $50.00 Monthly Pledge ECON: $100.00 Annually
Michelle's Pets and More	February	Capital Fund Voluntary Contribution: $0.00 Annually Membership: $412.00 Quarterly Membership Dues: $350.00 Annually Parking Lot Rent: $10.00 Monthly Parking Lot Rent: $50.00 Monthly Pledge ECON: $100.00 Annually
Atlanta Group	February	Capital Fund Voluntary Contribution: $25.00 Annually Membership Dues: $250.00 Annually Quarterly Membersip: $500.00 Quarterly
TESTTEST	February	Membership Dues: $750.00 Annually
		Capital Fund Voluntary Contribution: $0.00 Annually