5 Ways to Manage Year End Collections

GrowthZone
smarter association software

Collections is unfortunately a necessity when invoices are over-due and members have lapsed :(

5 Ways to Manage Year End Collections

- ✓ Review open credits and un-applied payment
- ✓ Identifying & re-sending over-due invoices
- ✓ Generating the Collections Report
- ✓ Sending Collections Letters
- ✓ Writing Off Invoices

Use the **Payment Summary** report to ensure that all payments made to you, have been applied to the appropriate invoices

WIKI: Payment Summary Report

Billing Reports

Payment Summary

Filter Options

Select Another Report

Date From: 9/1/2019   more...   Payment Method: ▼
Through: 9/26/2019   Item Type: ▼
Specific Batch: Choose a Batch *(optional)*   Item Basis: ▼

☑ Show **Active/Courtesy** members only.

Refresh Report   Print Report   Print PDF   Download Report   Reset Options

Payment Listing
September 1, 2019 - September 26, 2019

Date	Member	Payment Info	Details		Applied Amount
9/1/2019	Bikes Bikes Bikes	CreditCard: Visa *4242 Total Payment: **$100.00** Automatic Online credit card payment - ch_FjEaMl4ltBy5yu	100.00	CP-Membership Dues - Test 2019	100.00
9/1/2019	Cakes by Stefani	CreditCard: Visa *4242 Total Payment: **$138.33** Automatic Online credit card payment - ch_FjEarzCNDWlrdc	41.67	Anchorage Membership Fee	138.33
			8.33	Event Registration Fee 2019	
			5.00	Monthly Lunch	
			83.33	Event Sponsor	

Use the Member Balance Summary to check if your members have any open credits

WIKI: Member Balance Summary

Apply Credits & Unapplied payments

WIKI: Apply Credit

WIKI: Apply Un-applied Payment

The **Invoice Summary** report can be used to view all invoices, open invoices, past due invoices or invoices with a zero balance, in a certain date range

Use the report to review your open/past due invoices. From the report you will be able to easily resend your invoices

WIKI: Invoice Summary Report

The **Collections Report** provides you a way to identify all **past due invoices**. The report can be generated based on a specific transaction date, specific item type, batch, etc.

WIKI: Collections Report

Your ChamberMaster/MemberZone makes it easy for you to identify who has over-due invoices, and who should receive a collections letter

Pre-requisite – be sure to create your template for collection letters, so that you can easily use the Collection Letters function

WIKI: [Collection Letters](#)

Billing Reports

Collection Letters

[Select Another Report]

Filter Options

Report Date: 9/26/2019

Aging: 91 ▼ to any ▼ days

◉ Show **Active/Courtesy** members only.

○ **Specific Members** (0 selected)   [Clear List]

add by Company Name
add by Membership Status
add by Membership Type/Class

☐ Include **voluntary fee items** in balance.

Specific Batch: Choose a Batch (optional)

Letter Template: Reminder of Late Payment ▼
Output Option: Contact Preference ▼
Sales Rep: ▼
Item Type: ▼
Item Basis: ▼

[Refresh Listing] [Create Letters] [Reset Options]

Invoices

Output	Sales Rep	Member Name	Status	Aging	Balance
Email ▼	Ambassador A A	A Place for Dogs	Active	105 - 706	1060.00
Email ▼		Beautiful Blooms	Active	189 - 706	2715.00
Email ▼	Joan Larson	Big Fish Charters	Active	92 - 833	1680.00
None ▼		Bikes Bikes Bikes	Active	160	440.00
Email ▼		Blackie's Pet Shop	Active	95 - 140	600.00
Email ▼		Boats by Bruce	Active	95 - 140	244.80

If you have created Membership Packages that include your fee items, updating the fee item will not automatically update the price of the package OR if you are using a Fee Schedule and the structure has changed, you will need to upload a new fee schedule

WIKI: Setup the Online Membership Application

Questions?