

# 5 Ways to Implement ePayment with GrowthZone Pay



1. Invite your Members to add stored payment profiles
2. Setup Recurring Fees on ePayment
3. Notify your Members they are set
4. Run Batches of ePayments
5. Monitor Stored Payment Profiles

# 1...Invite Your Members to Store Payment Profiles

Any steps you can take to shorten your receivables process will increase your cash flow – invite your members to store their credit card/bank information for use in automatically paying their dues

WITH PAPER BILLING, IT TAKES ABOUT  
**56 DAYS FROM INVOICING TO  
PAYMENT RECEIPT.**

WITH E-INVOICING AND RECURRING  
PAYMENTS, THAT **SPEEDS UP**  
THE PROCESS BY AROUND  
**SIX WEEKS.<sup>1</sup>**

## 1...Invite Your Members to Store Payment Profiles



Use the **Automatic Monthly Payment** email template to invite your members to access the MIC and store their payment profile information

## WIKI: Invite your Members

## Send an Email: A Place for Dogs

Member: [choose member](#)

To:

From:

Subject:

CC:

BCC:

Email Text:

Source

Styles
Format
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~~S~~
x<sub>2</sub>
x<sup>2</sup>

Setup automatic payments! Never forget another membership payment! Save on stamps, checks, and late fees. Please follow these simple steps to get started.

**STEP ONE:**

1. \*Login to the Member Information Center at [http://\[AName\]/login?dest=paymentprofile](http://[AName]/login?dest=paymentprofile)
2. Add your credit card or bank account as a new Payment Profile.
3. Check the box to "Notify [organization\_name] that you are interested in setting up automatic payments..."
4. Save your Payment Profile.

# 1...Invite Your Members to Store Payment Profiles

## Payment Profiles

### My Payment Profiles

Pay bills and checkout of your shopping cart quickly and securely. Create, delete and edit your payment profiles that will be options for payment methods with CM MZ Training.

### Current Profiles

None Available

► Add a New Payment Profile

### Payment Information

☒ Credit Card ☐ Bank Account

\*Card Number:  Exp. Month:  Exp. Year:  CSC: ?

☐ Notify CM MZ Training that I am interested in setting up automatic payments and select to use this profile for the recurring charges.  
**Note:** Once automatic payments are setup with CM MZ Training, keep this checkbox selected so that you can easily identify which profile is being charged.

Company:

\*First Name:  \*Last Name:

\*Street:

\*City:  \*State:  \*Zip:

\*Country:

Phone:  Email:

Add Profile

Video: Storing a Credit Card Profile

# 1...Invite Your Members to Store Payment Profiles

**Payment Profiles**

### My Payment Profiles

Pay bills and checkout of your shopping cart quickly and securely. Create, delete and edit your payment profiles that will be options for payment methods with CM MZ Training.

### Current Profiles

None Available

► [Add a New Payment Profile](#)

☐ Credit Card ☒ Bank Account

\*Account Number:

\*Routing Number:

\*Country:  

United States ▼

\*Currency:  

United States Dollar ▼

☐ Notify CM MZ Training that I am interested in setting up automatic payments and select to use this profile for the recurring charges.  
**Note:** Once automatic payments are setup with CM MZ Training, keep this checkbox selected so that you can easily identify which profile is being charged.

Company:

\*First Name:

\*Last Name:

\*Street:

\*City:

\*State:

\*Zip:

\*Country:  

United States ▼

Phone:

Email:



WIKI: [Store Bank Account in MIC](#)



# 1...Invite Your Members to Store Payment Profiles

### My Payment Profiles

Pay bills and checkout of your shopping cart quickly and securely. Create, delete and edit your payment profiles that will be options for payment methods with Green Valley Chamber of Commerce.

#### Current Profiles

 VISA:\*\*\*\*\*0027-07/2015 

 Greatwestern Bank:\*\*\*\*\*9302 - (Unverified) 

Verification steps: Look for 2 small deposits in your account in the next few days; edit the profile and enter those amounts

### Payment Information

Account Number:

Routing Number:

Country:

Currency:

\*Deposit Amount:

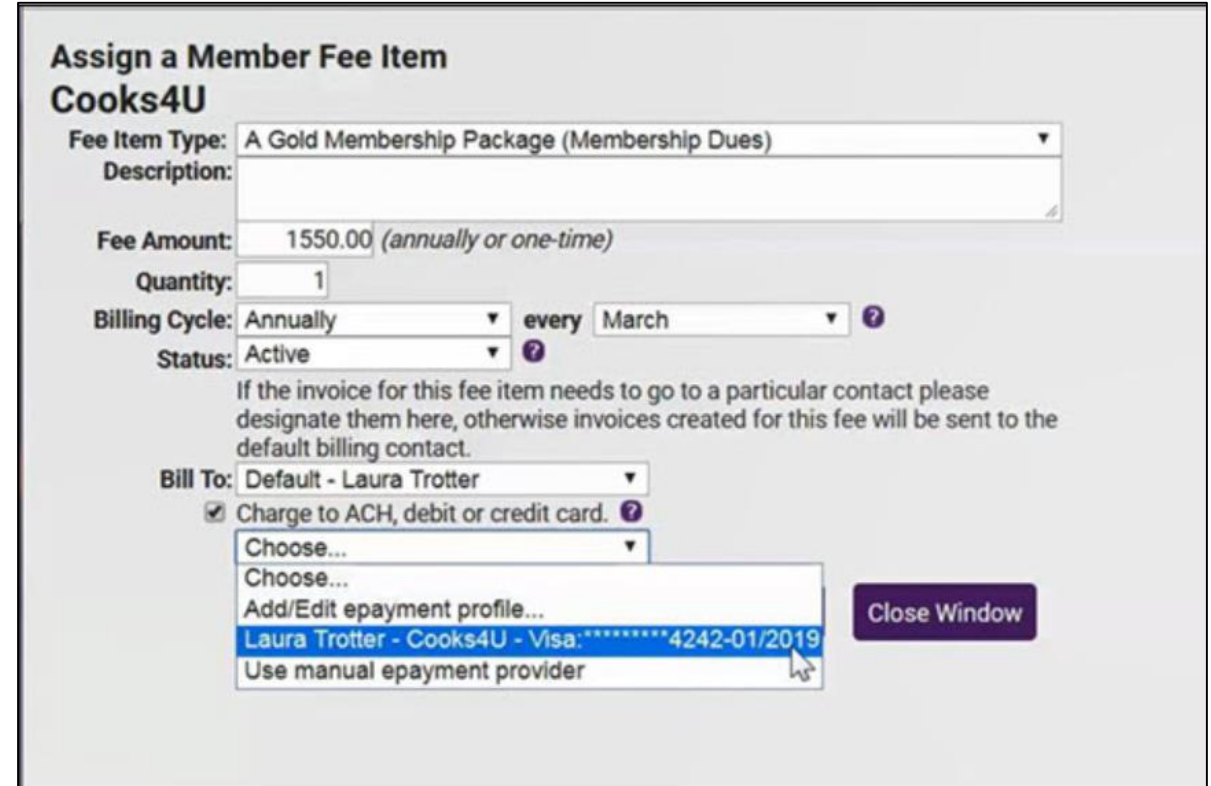
\*Deposit Amount:

WIKI: [Store Bank Account in MIC](#)

## 2....Setup Recurring Fees on ePayment

Once your member has added a stored profile via the MIC, and the member has authorized you to charge recurring fees to the profile, you can setup their recurring fees to be billed to the stored profile

WIKI: [Setup Recurring Charges to be Billed to Stored Profile](#)



**Assign a Member Fee Item**  
**Cooks4U**

Fee Item Type: A Gold Membership Package (Membership Dues) ▼  
Description:

Fee Amount: 1550.00 (annually or one-time)  
Quantity: 1

Billing Cycle: Annually ▼ every March ▼ ?  
Status: Active ▼ ?

If the invoice for this fee item needs to go to a particular contact please designate them here, otherwise invoices created for this fee will be sent to the default billing contact.

Bill To: Default - Laura Trotter ▼  
☒ Charge to ACH, debit or credit card. ?  
Choose... ▼  
Choose...  
Add/Edit epayment profile...  
Laura Trotter - Cooks4U - Visa:\*\*\*\*\*4242-01/2019  
Use manual epayment provider

Close Window



## 3....Notify your members that they are set..

### Notify your members that they are set to go... Edit the Automatic Payment Confirmation email template

Thank you for signing up for automatic payments.

Based on the information and authorization provided by you, we will charge your credit card starting on December 1, 2018 and annually for the amount of \$1200.00 for your Gold Membership. The account to be charged has been entered into the Member Information Center under your account and is identifiable by the last 4 digits \*4242.

To change this payment authorization, please let us know by calling .

Thank you!  
V9 Training DB  
12345 Main Street  
Crosby, MN 56441

## 4...Run Batches of ePayments

The task list will notify of invoices that need to be generated, and by clicking into the invoices, you will be able to process ePayments for recurring dues.

WIKI: [Process ePayment Batches](#)

### Uncreated Invoices

Switch to a different month to see outstanding invoices for another month. Recurring and Group batches below display outstanding invoices only for the month selected. Event and One-time fees are not specific to a particular month; they will always display here until created or cleared. Note: only active members are include in the recurring invoices quantity. If you bill members with other statuses, the Task List will not include those in the count. Set your default month under Setup->Billing Options and Settings.

Assigned fees for: March, 2019 Refresh

Recurring Fees Batches			
Batch Group	epayments	Pending	Action
Default	Yes	2	<a href="#">create invoices</a>

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WIKI: [Process ePayment Batches](#)

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Assigned fees for:  [Refresh](#)

Recurring Fees Batches			
Batch Group	epayments	Pending	Action
Default	Yes	2	<a href="#">create invoices</a>



## 5...Monitor Stored Payment Profiles

### WIKI: ePayment Profile Report

Will allow you to check expiration dates, and whether bank accounts have been verified

**ePayment Profile Report**  
Profile Type:   
Status:   
Sort:

1 of 1 | Save as [PDF](#) [Excel](#) [Word](#) [CSV](#)

  
  
**REGIONAL TRAINING**

**ePayment Profile Report**


Company Name	First Name	Last Name	Mem ID	Rep ID	User ID	Profile ID	Profile Name	Profile Description	Modified	Auto Pay Selected	Status
A Place for Dogs	Eric	Allan	70	216	2237954	48354	Visa:*****4242-01/2018	Visa:*****4242-01/2018	12/13/2017	No	Expired
Anything I Want to Be	Me	MoreME	67	67	2238820	48378	Visa:*****4242-01/2018	Visa:*****4242-01/2018	12/13/2017	No	Expired
Beyer's Ace Hardware	Cheri	Petterson	86		2238372	48368	Visa:*****4242-01/2018	Visa:*****4242-01/2018	12/13/2017	No	Expired
Monets Landscaping	Cheri	Petterson	69		2238491	48371	Visa:*****4242-01/2018	Visa:*****4242-01/2018	12/13/2017	No	Expired

10/16/2018 4:13:33 PM

## 5...Monitor Stored Payment Profiles

### WIKI: ePayment Fee Assignment Report

The **ePayment Fee Assignment** report will display which members have manual or automatic ePayments assigned, for how much, how often, and the start or end dates assigned

 <b>ePayment Fee Assignment</b>								
REGIONAL TRAINING								
Company Name	BillTo Rep	Fee Item Name	Profile Type	Profile	Fee Start Date	Fee End Date	Frequency	Months Bill
Deli'cious	Rachel Stanford	A Gold Membership Package	ePayment Profile	Rachel Stanford - Deli'cious - Visa:*****4242-01/2021			Annually	Feb
Cooks4U	Laura Trotter	A Gold Membership Package	ePayment Profile	Laura Trotter - Laurel Builders, Inc. - Visa:*****4242-01/2019			Annually	Mar
Harry's Hair	Harry White	A Gold Membership Package	ePayment Profile	Harry White - Harry's Hair - Visa:*****4242-01/2021			Annually	Jul
DJ Entrprises	DJ McEwen	A Gold Membership Package	ePayment Profile	DJ McEwen - DJ Enterprises - Visa:*****4242-01/2019			Monthly	Every Month
Quinns Fruit Stand	Susan Kallaw	CP - Membership Dues Fee	ePayment Profile	Quinne Kallaw - Quinns Fruit Stand - Visa:*****4242-01/2022	1/1/2018		Annually	Oct
Beyer's Ace Hardware	Susan White	Silver Membership Package	ePayment Profile	Susan White - Beyer's Ace Hardware - Visa:*****4242-01/2019	2/1/2018		Annually	Feb
Anything I Want to Be	Me MoreME	A Gold Membership Package	ePayment Profile	Me MoreME - Anything I Want to Be - Visa:*****4242-01/2018	3/1/2018		Annually	Mar

**Not using GrowthZone Pay? Contact [sales@growthzone.com](mailto:sales@growthzone.com) to get started...**

Questions?