

OVERVIEW OF DUES & FEES

Community members expect secure online payment solutions. We provide a built-in, easy-to-use, options that encourage users to stay up to date on dues and fees.

- ◆ **Before creating your first due or fee for collection, it is important to start by setting up your organization's Stripe card-processing account. Instructions for this process can be downloaded from the "Settings" tab in the Admin Panel by clicking on the "click here" link near the top of the window. If you prefer to collect payments as ACH debits, activate the "Enable Plaid Payments" to access a Plaid debit-processing account. Request detail set-up documentation for this process as well. If you still have questions, be sure to open a support ticket through the [Help Desk](#).**

Once your payment processing accounts have been set up through Stripe and/or Plaid, you are now ready to collect fees using the Dues & Fees feature.

Click the "Features" tab to open the menu, then the "Dues & Fees" tab to view a list of current obligations. Here you can see important information about each item, including how often it's billed and how many members have overdue payments. Click on the "Add New Dues Tier" button in the top right to create a new item.

NAME	AMOUNT	FREQUENCY	START DATE	TAGS	LATE MEMBERS	ACTIONS
Annual HOA Dues	\$600.00	Annually	January 1	0	7	
Clubhouse Fees	\$25.00	Monthly	January 1	0	5	
Locker Rental	\$25.00	Monthly	January 1	0	0	
Pool Access	\$25.00	Annually	April 1	0	3	

In the "ADD" window, name the payment item and enter the amount due. Select the payment frequency from the "Frequency" dropdown menu and indicate whether the payment schedule begins on a specific date or the date a member joins your organization. Select the month, day, and year the payment is due.

To limit the fee to members of specific committees or interest groups, select one or more "tags" from the "Select Applicable Member Groups" menu. To invoice your entire membership, activate the "Invoice All Members" checkbox. This option will not appear if you have opted to limit to a select member group in the list above.

- ◆ **The best way to limit unintended duplicate invoices being sent to multiple members at the same address is to create and assign a head-of-household "tag" for each address. Once created, this tag will appear in the "Select Applicable Member Group" list and can be assigned to prevent households from being invoiced more than once for fees like Annual HOA Dues. If you need additional information on how to create Tags, visit the [Help Desk](#) to open a support ticket.**

ADD

Dues Name Amount

Frequency Based On

Month Due Date Due

Year Due

Payments are considered due 30 days before the due date and will be past due the day after the due date.

Select Applicable Member Groups

Invoice All Members

Enable Fees

Required for Member Access

OVERVIEW OF DUES & FEES - CONTINUED

The “Enable Fees” checkbox determines whether payment is required. When this option is active, the fee is invoiced. If you deactivate this checkbox, the fee is not collected.

- ◆ **Please note that it is recommended to leave the “Enable Fees” checkbox inactive until you are absolutely certain you are ready for invoices to be emailed to members. Once a “Due” has been assigned to members it cannot be deleted, only deactivated.**

Activate the “Required for Member Access” checkbox to block members from access to your website, unless they pay this fee. When the “Required for Member Access” checkbox is active, members with overdue payments will be directed to the public Pay Dues page. They will not be able to gain full access to the rest of the site until payments are made. The main navigation bar to the rest of the website will be hidden from view until payment is made.

Click on the “Save” button to finish creating your fee, or the “Cancel” button to end the process without creating a fee.

For community members to have access to Dues & Fees, your website will need to include a Pay Dues feature template page. If you need more information about adding a new template page to your site, visit the Help Desk on that topic for in-depth instructions.

If you have any further questions about the Dues & Fees features, please visit support.hoastart.com where you can open a support ticket.

Cedar Falls
San Antonio, TX

f t @ in Donny's Profile | My Dashboard | Log Off
(123) 456-7890 | admin@cedarfalls-community.com

Pay Dues

We Make It Easy For You
Please see below for all dues as well as a history of previous payments below that.

If you want or need to pay not online, please reach out and we will have the necessary documentation/instructions emailed over. If you have any questions on your dues, please feel free to reach out to your admin team.

Monthly HOA Dues
Monthly

Balance Due **\$125.00** Due Date **5/1/2021**

Your payment is late [more info](#)

Payment information
Visa *****4242 [edit](#)

[Make a Payment](#)

Pool Access
Monthly

Balance Due **\$25.00** Due Date **6/1/2021**

Your payment is due [more info](#)

Payment information
Visa *****4242 [edit](#)

[Make a Payment](#)

Clubhouse Fees
Monthly

Balance Due **\$50.00** Due Date **5/1/2021**

Your payment is late [more info](#)

Payment information
Visa *****4242 [edit](#)

[Make a Payment](#)

Payment History

3/23/2021	Event Registration	8th Annual Blood Drive	Made a payment of \$200.00	more info
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