ADDING A NEW DUES TIER

Your organization funds at least part of its operations through the dues and fees you collect from your membership. Here's how to create a new payment item and select the ideal combination of settings for it.

To collect payments online, you'll first need to set up your payment processing accounts on the Settings page. Your Stripe account will handle credit and debit card payments, while your Plaid account takes care of ACH debits so members can pay directly from a checking account. You can find additional information on setting up your Stripe account and Plaid account using these links.

To begin creating dues and fees, click on the "Payments" tab to open it, and the "Dues & Fees" tab to view and create your items.

When the "DUES & FEES" window opens, access the "Dues Actions" dropdown menu at the top right and choose "+Add New Dues Tier."

First, give your Dues a descriptive name and enter the amount to be invoiced.

Next, decide if you want to charge late fees for tardy payments, or enable members to make partial payments so they can split up the cost of an item.

If you decide you want to add late fees, activate the checkbox to enable them. When you do, two additional data-entry boxes appear. Enter the amount, and then a number that represents the "grace period" between the due date and the date on which your late fee applies.

If you decide you prefer to use the partial payments feature instead, simply activate its checkbox.

◆ *Please note that if you Enable Late Fees, you can't offer Partial Payments to Members.*

ADDING A NEW DUES TIER - CONTINUED

Another option to consider: Passing through service fees to your members as part of the cost of this item. For example, if you accept online payments, you can use this feature to add their modest transaction fees to the invoice total and pass them on to members. Once you activate "Enable Service Fee," decide whether you want to add a percentage of the item cost, a flat fee, or both. You'll see immediate confirmation of the total once you enter either or both of these values.

> ◆ *Please note that Stripe, our third-party payment system, charges 2.9% plus 30 cents per transaction. Stripe subtracts this charge from the collected total when you accept card payments online. This values serve as the defaults when you Enable Service Fee.*

Your next choice determines how often this item invoices. The "Frequency" dropdown menu gives you five choices: "Annually," "Quarterly," "Semi-Annually," or "Monthly" for invoices that recur periodically, or "One-Time" for a dues item that only bills once.

Next, select the basis for the due date. Your item can come due based on the date each member signed up for access to your website, or based on a preset date that you select. If you accidentally select a preset date that's in the past, the system will reinterpret that date into the future for you.

Many dues and fees recur a specific number of times each and every year, but some only bill for a specific amount of time. If you set the "End" dropdown menu to "None," your item will continue to invoice indefinitely. If you set the "End" dropdown menu to "On," now you can choose the month, date, and year on which the item stops billing.

Payment terms equal the number of days between when an invoice goes out and when it's due. The "Terms" dropdown menu gives you four choices: "Net 15," "Net 30," "Net 45," and "Net 60."

hoastart™

ADDING A NEW DUES TIER - CONTINUED

Next, designate who receives invoices for this item. Once again, you need to make one choice among several options. You can invoice everyone, select specific members, invoice all households (more about that in a moment), or select groups of members based on the tags you apply to them through their Member Profiles or committees they may be apart of.

The first of these choices, "Invoice All Members," means just that: Everyone who's signed up with an account on your website will receive an invoice.

"Invoice Individual Members" gives you access to the "Invoiced Members" dropdown menu, from which you can select specific people. To remove someone you've added, click on the "X" to the left of their name.

"Invoice All Households" won't apply to your community unless you've activated and implemented the Households feature. This feature makes it easy to send only one invoice to every address, regardless of how many members live there, and how many of them have accounts on your website. The Households feature also enables you to limit the number of votes a household can cast when you add an online poll or survey.

If you activate "Invoice All Households," you also can use the "Invoice Empty Households" option to send an invoice to addresses with no owner, with members who have not signed up for website access, or with members who don't qualify for Household dues because of the way you've set up the feature. *(For more about Households, you can review this [reference guide](#).)*

Your final invoicing option enables you to select from the list of tags you've created, both automatically every time you create a committee and manually when you designate members of a volunteer group or people who meet some specific criterion. You'll see a "Select all" checkbox at the beginning of the list of tags—but remember that that's not the same thing as "Invoice All Members," because some members may have no tags applied to them.

◆ *Please note that if you don't select one of these four invoicing options, your dues item will not invoice anyone. That can be a way to set up a dues item before you need it. If you're ready to start billing this item, however, make sure you define who should receive it.*

ADDING A NEW DUES TIER - CONTINUED

The next checkbox determines whether this dues item becomes active for processing. If you're setting up a test item, leave this option unchecked. If your dues item is ready to go, activate it.

Want to block members from access to members-only portions of your website unless and until they pay their invoice for this item? Activate the "Required for Member Access" checkbox so they'll be blocked—and reminded to pay.

To see the invoicing and payment due dates for this item, as well as the number of invoices it will generate each time it bills, click on the "Calculate Invoice Schedule" button. Note that this button will reappear any time you change an option that alters invoicing and payment-due schedules.

To see the actual payment schedule, click on the "Payment Schedule" link.

When you're happy with your choices, click on the "Save" button to complete the process.

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

☑ Activate Due ⊚

☐ Required for Member Access ⊚

This will generate 36 unique Member invoices

This Due will start on **11/1/2022** and will be due on **12/1/2022**.

It will next bill on **11/1/2023**.

Payment Schedule

* Required Information

[Save] [Cancel]

INVOICE PAYMENT SCHEDULE ✕

Invoice Billing Date	Invoice Due Date
11/1/2022	12/1/2022
11/1/2023	12/1/2023
11/1/2024	12/1/2024
11/1/2025	12/1/2025
11/1/2026	12/1/2026
11/1/2027	12/1/2027
11/1/2028	12/1/2028
11/1/2029	12/1/2029
11/1/2030	12/1/2030
11/1/2031	12/1/2031
11/1/2032	12/1/2032
11/1/2033	12/1/2033
11/1/2034	12/1/2034
11/1/2035	12/1/2035

[Close]

hoastart ™