



# Billing Schedules

2017 - Spring Edition

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# Overview

Billing Schedules are designed as a club specific solution to billing members their dues and other club fees associated with rentals, lockers, boat slips, etc. The Office system can generate various frequencies of Billing Schedules including Monthly, Quarterly, Semi-Annual, Yearly, and Custom schedules. In this document, we will explain the various functionalities of a Billing Schedule, and how to create a new schedule.

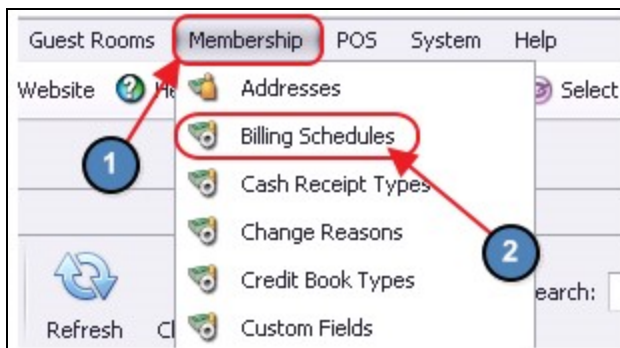
## Use Case(s)

The Club has a Member Type called Seasonal Membership, which allows a Member to join the Club for a limited number of months during the year. The Club assigns a custom Billing Schedule to the Seasonal Membership Member Type, to ensure fees are only charged to these Seasonal Members during the months of their seasonal Membership (ie - \$1,200/month from January - March).

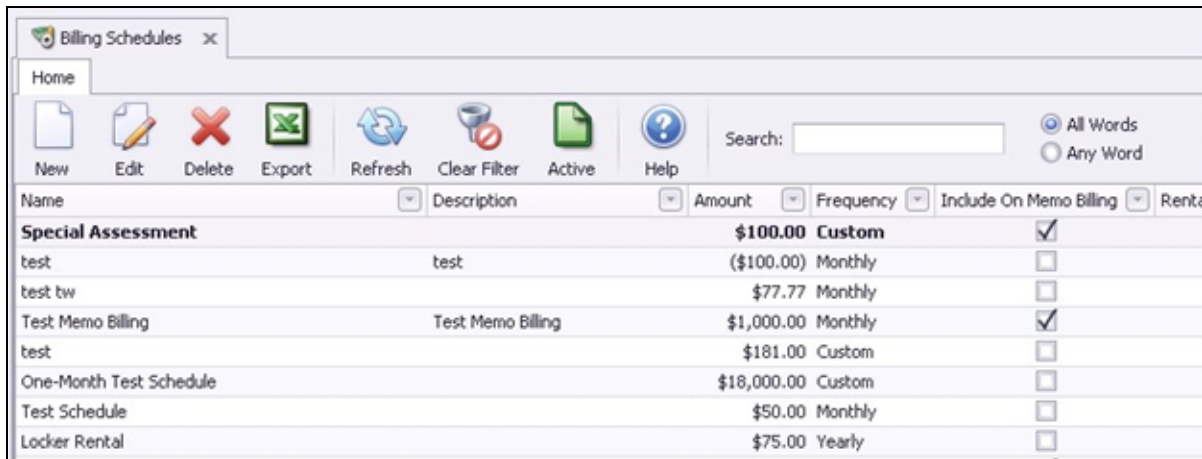
## Accessing the Tool

To access **Billing Schedules**,

- 1) Navigate to **Membership** across the top toolbar and select **Billing Schedules**.



- 2) The **Billing Schedules Grid** will launch.



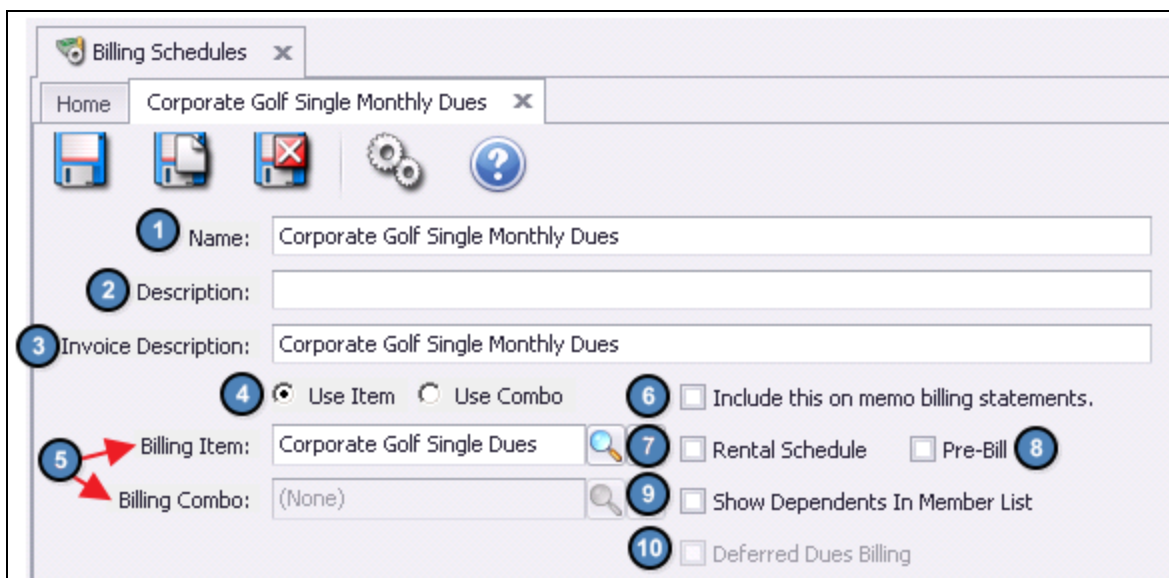
Name	Description	Amount	Frequency	Include On Memo Billing	Rental
<b>Special Assessment</b>		<b>\$100.00</b>	<b>Custom</b>	<input checked="" type="checkbox"/>	
test	test	(\$100.00)	Monthly	<input type="checkbox"/>	
test tw		\$77.77	Monthly	<input type="checkbox"/>	
Test Memo Billing	Test Memo Billing	\$1,000.00	Monthly	<input checked="" type="checkbox"/>	
test		\$181.00	Custom	<input type="checkbox"/>	
One-Month Test Schedule		\$18,000.00	Custom	<input type="checkbox"/>	
Test Schedule		\$50.00	Monthly	<input type="checkbox"/>	
Locker Rental		\$75.00	Yearly	<input type="checkbox"/>	

The primary functions associated with managing **Billing Schedules** are embedded in the Billing Schedules setup screen, which can be accessed by double-clicking on an existing Schedule (to edit an existing Schedule), or clicking the **New** button (to create a new Schedule).

## Billing Schedules Setup Screen - Tab Overview

In this section we will review the various tabs within a Billing Schedule.

### General Information



Corporate Golf Single Monthly Dues

1 Name: Corporate Golf Single Monthly Dues

2 Description:

3 Invoice Description: Corporate Golf Single Monthly Dues

4  Use Item  Use Combo

5 Billing Item: Corporate Golf Single Dues

Billing Combo: (None)

6  Include this on memo billing statements.

7  Rental Schedule

8  Pre-Bill

9  Show Dependents In Member List

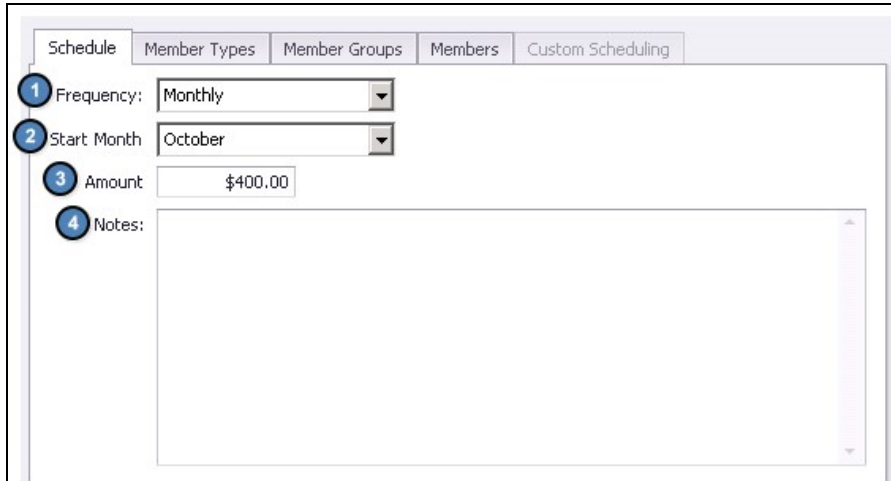
10  Deferred Dues Billing

1. **Name** - Enter the **Name** of the new Billing Schedule.
2. **Description** - Enter a **Description**. (Optional)

3. **Invoice Description** - This will be the **Description** that appears on the Invoice at the corresponding Month End.
4. **Use Item/Use Combo** - If the entity to be charged at Month End is an Item, select **Use Item** (Selected by Default). If the entity to be charged at Month End is an Item Combo, select **Use Item Combo**.
5. **Billing Item** - If **Use Item** was selected in the previous step, select the **Billing Item** to be charged at Month End. **OR**  
**Billing Combo** - If **Use Combo** was selected in the previous step, select the **Billing Combo** to be charged at Month End.
6. **Include This on Memo Billing Statements** - If checked, the Billing Schedule will be included on any Memo Billing Statements sent for the corresponding Month End.
7. **Rental Schedule** - If the Billing Schedule is created for Rental Schedule purposes, please check this box.
8. **Pre-Bill** - Only applicable to Quarterly, Semi-Annual, Yearly, or Custom Schedules. If checked, the system will bill one month prior. For instance, if the frequency is set to **Yearly** and the Start Month is **October**, members will be billed on the **September 30<sup>th</sup>** Statement.
9. **Show Dependents in Member List** - If checked, Dependent members will show in the Member Lookup found on the Member's tab of the Billing Schedule.
10. **Deferred Dues Billing**- Please see the [Deferred Dues Billing](#) section of this guide for more information on creating a deferred billing schedule.

**Important:** Any Billing Schedule applied to a Dependent Member will also show on the Primary Member's account.

## Schedule



1. **Frequency** - Select the frequency of the Billing Schedule (Monthly, Quarterly, Semi-Annual, Yearly, or Custom).
2. **Start Month** - Select the month the Billing will start.
3. **Amount** - Enter the Amount to be billed.
4. **Notes** - Add any additional Notes to the Billing Schedule.

## Applying the Billing Schedule to Members

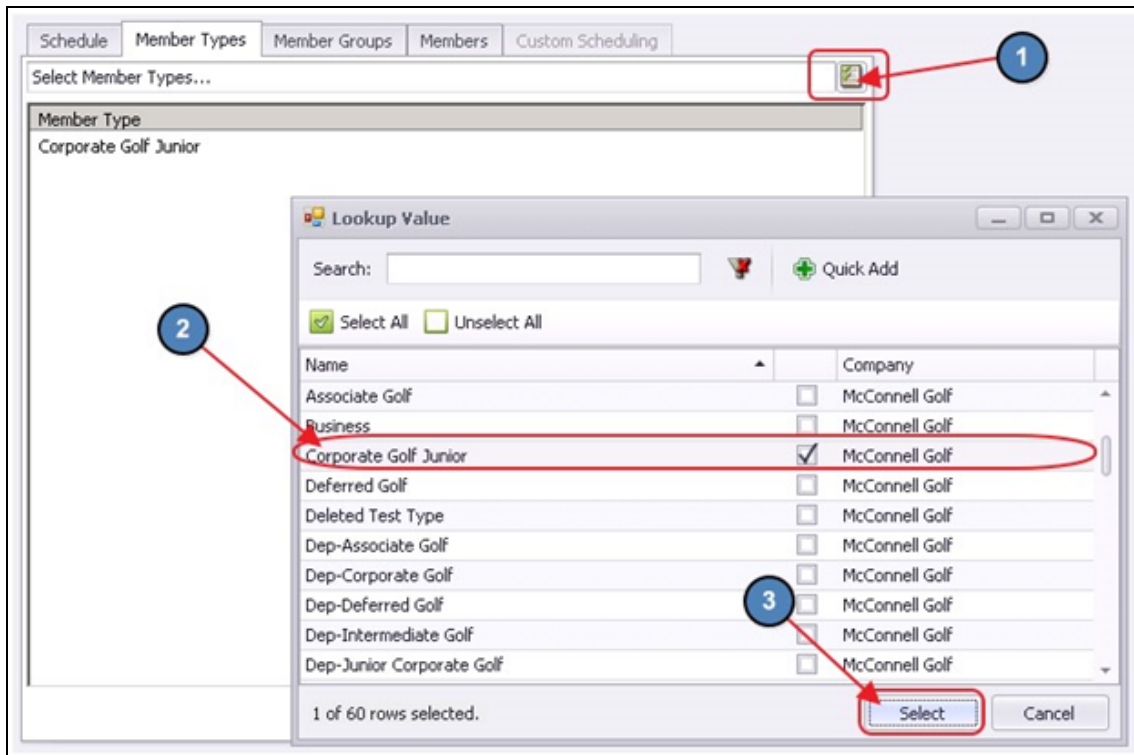
Keeping Billing Schedules consistent, and easy to track is an essential process. With this being said, it is most efficient and effective to apply **Billing Schedules** at the **Member Type** or **Member Group** level. It is, however, possible to apply Billing Schedules on an individual Member basis if desired. Please see below instructions on how to apply Billing Schedules at each level.

**Important:** It is **NOT** recommended to apply Billing Schedules at multiple levels at the same time.

### Member Type

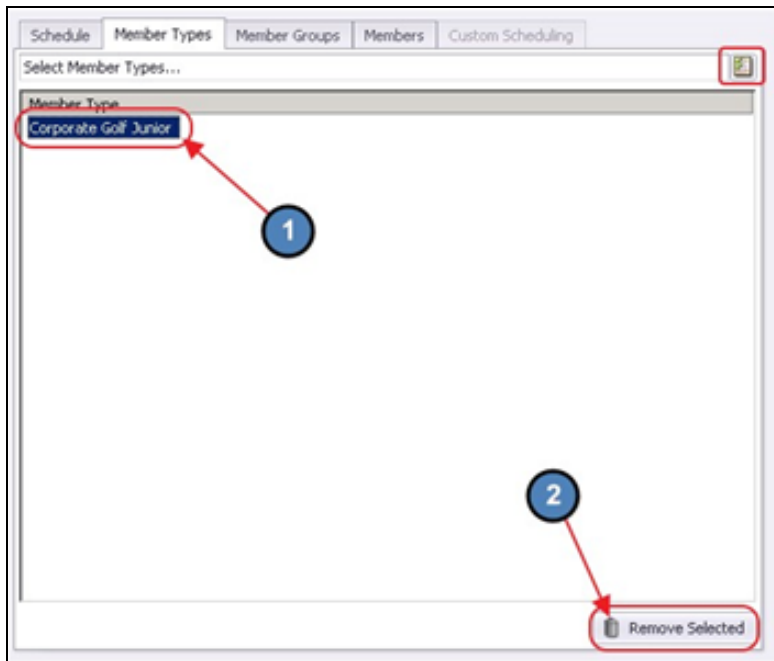
To apply the Billing Schedule at the Member Type level, first navigate to the Member Types tab within the Billing Schedule.

Next, select the **Member Types Lookup**, click to select the applicable Member Type(s) from the Lookup value, and choose **Select** at the bottom of the screen.



**ALL** members who are in the Member Type(s) selected on this screen will be billed.

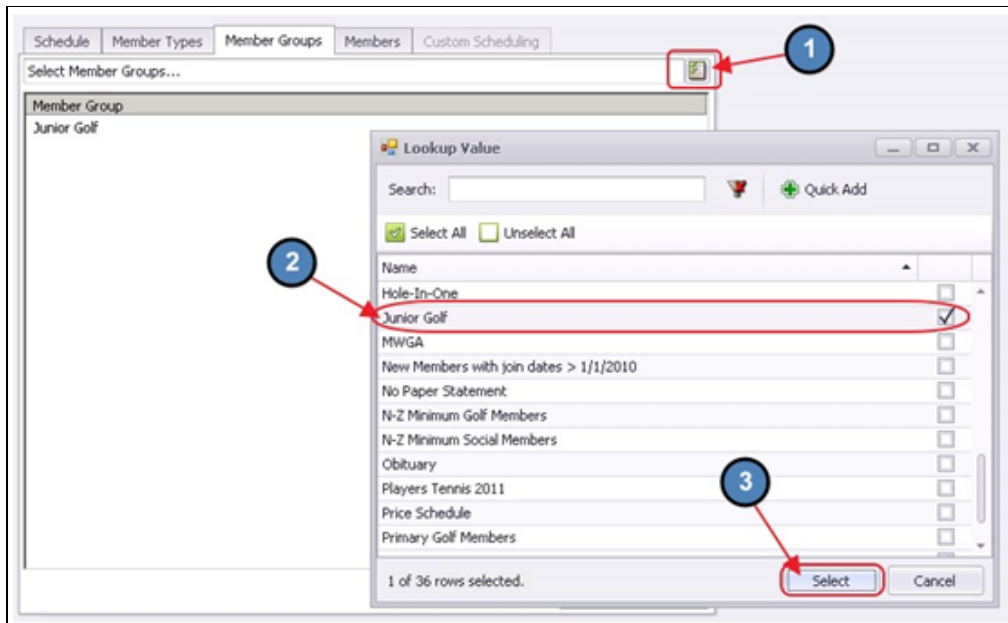
To remove a Member Type from the Billing Schedule, highlight the Member Type in question from the selected Member Types screen and choose **Remove Selected**.



## Member Groups

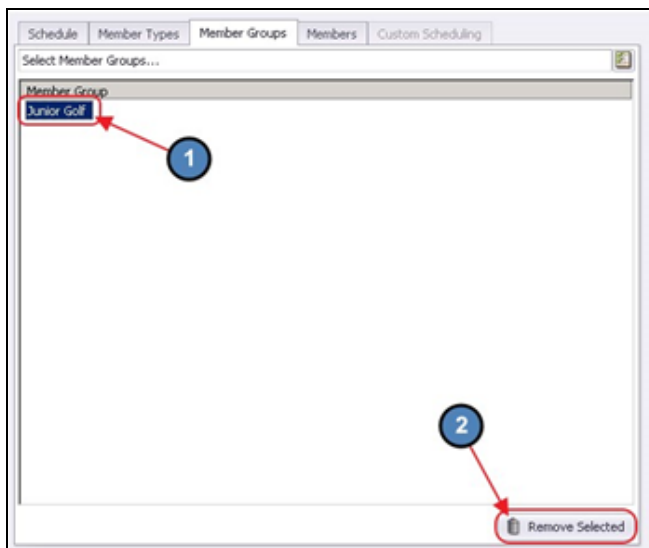
To apply the Billing Schedule at the Member Group level, first navigate to the Member Groups tab within the Billing Schedule.

Next, select the **Member Groups Lookup**, click to select the applicable Member Group(s) from the Lookup value, and choose **Select** at the bottom of the screen.



**ALL** members who are in the Member Group(s) selected on this screen will be billed.

To remove a Member Group from the Billing Schedule, highlight the Member Group in question from the selected Member Groups screen and choose **Remove Selected**.

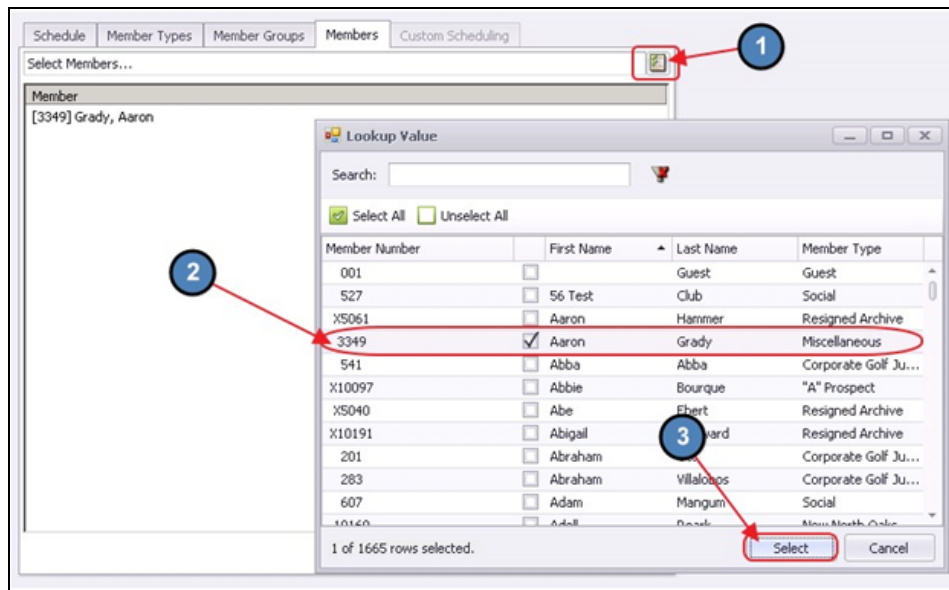


## Members

Although it is not recommended, Billing Schedules can also be applied on an individual member basis.

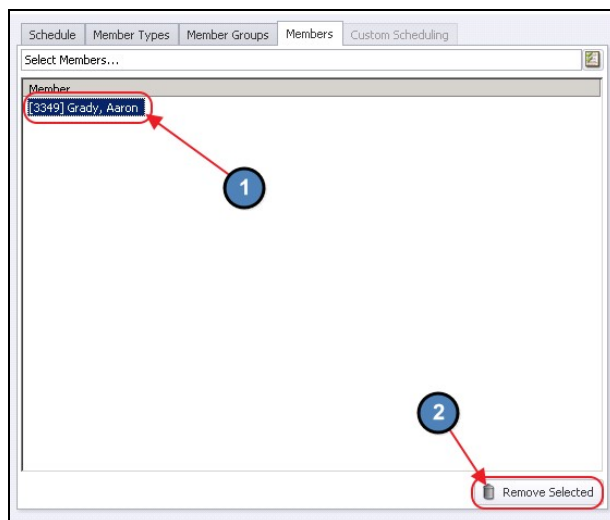
To add an individual member to the Billing Schedule, first navigate to the Members Tab within the Billing Schedule.

Next, select the **Member Lookup**, click to select the applicable Member(s) from the Lookup value, and choose **Select** at the bottom of the screen.



Any Member selected on the Members tab will be billed.

To remove a Member from the Billing Schedule, highlight the Member in question from the selected Members screen and choose **Remove Selected**.

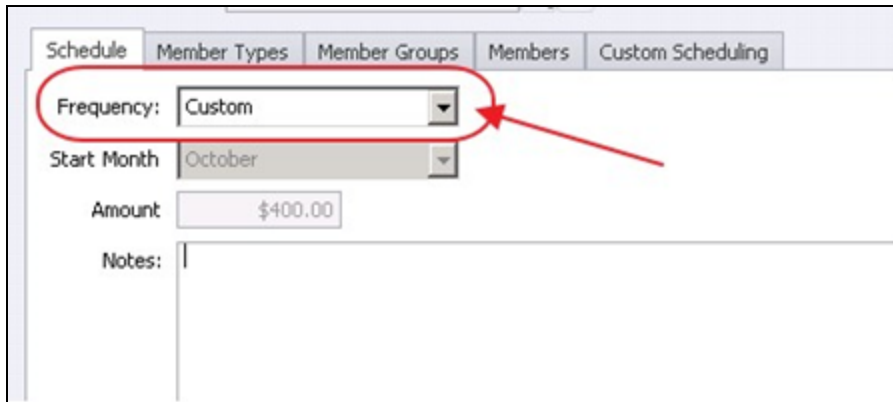




## Custom Scheduling

Billing Schedules can also be applied on a custom basis. For instance, with Custom Scheduling, the user can specify which months out of the year the Billing Schedule will apply to their members, or they can specify varying billing amounts depending on the month.

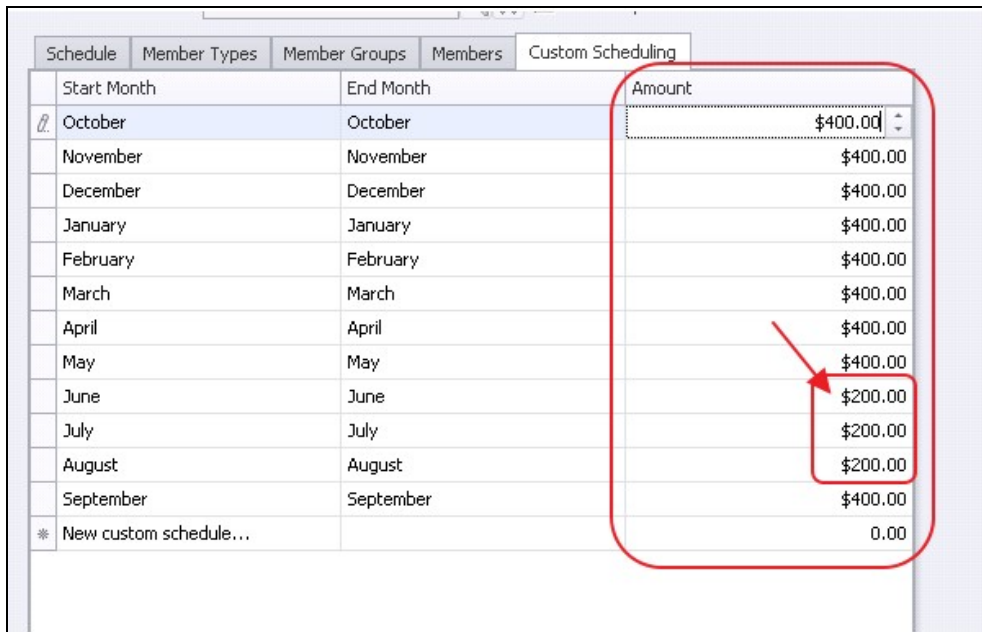
To set up a Custom Schedule, first set the Frequency on the Schedule tab to Custom. As evidenced in the screenshot below, when the Frequency is set to Custom, the Start Month and Amount become Null.



The screenshot shows the 'Schedule' tab with the following fields:

- Frequency: Custom (highlighted with a red circle and arrow)
- Start Month: October
- Amount: \$400.00
- Notes: (empty text area)

Navigate to the **Custom Schedule tab**, and as you will see the amount that was originally entered on the **Schedule** tab, has now populated into the Amount field next to each Month. This is used to help simplify the entry process. Please navigate through each Month and apply the appropriate amount to be charged.

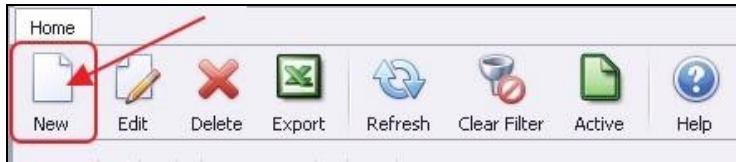


Start Month	End Month	Amount
October	October	\$400.00
November	November	\$400.00
December	December	\$400.00
January	January	\$400.00
February	February	\$400.00
March	March	\$400.00
April	April	\$400.00
May	May	\$400.00
June	June	\$200.00
July	July	\$200.00
August	August	\$200.00
September	September	\$400.00
* New custom schedule...		0.00

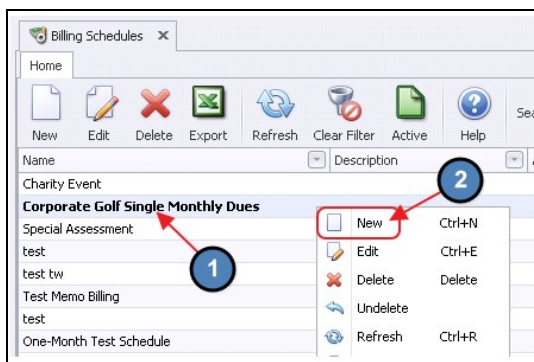
# Create a New Billing Schedule

To create a new **Billing Schedule**, navigate to the Billing Schedules Grid and perform either of the following to launch the Billing Schedule setup screen:

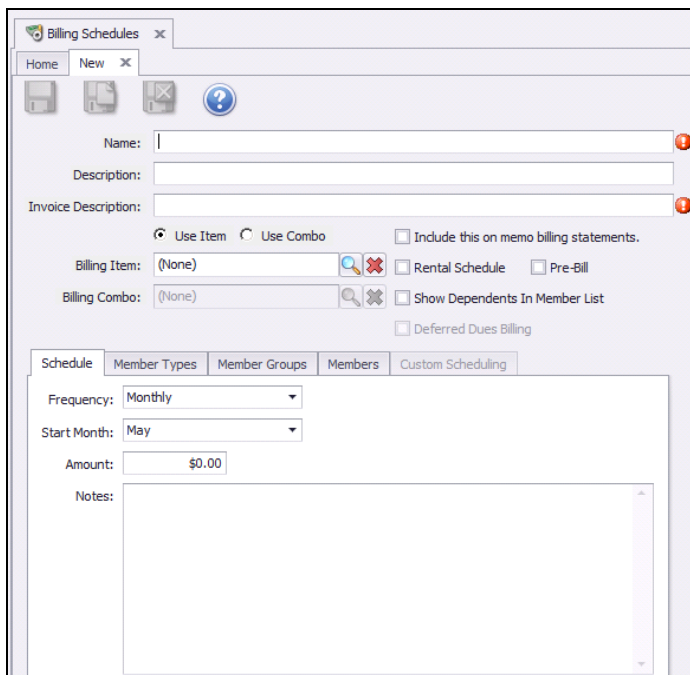
- 1) Click the **New** icon on the toolbar. **OR**



- 2) Right-click anywhere on the **Billing Schedules Grid** and select **New**.



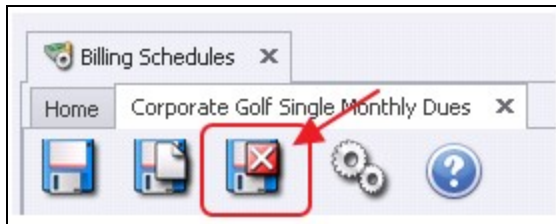
- 3) The Billing Schedule setup screen will launch.



4) Complete the **General Information**, and then navigate to each of the below tabs and enter all relevant information. It is recommended to enter information on these tabs in **sequential order**. Please see the **Tab Overview** section of this document for further instructions on each tab.

- **General Information**
- **Schedule**
- **Applying the Billing Schedule to Members**
- **Custom Scheduling (if applicable)**

5) Lastly, click **Save & Close** to complete the setup of the new Billing Schedule.



## Deferred Dues Billing

In this section, we will discuss how to create a Billing Schedule in which revenue needs to be deferred over a future period.

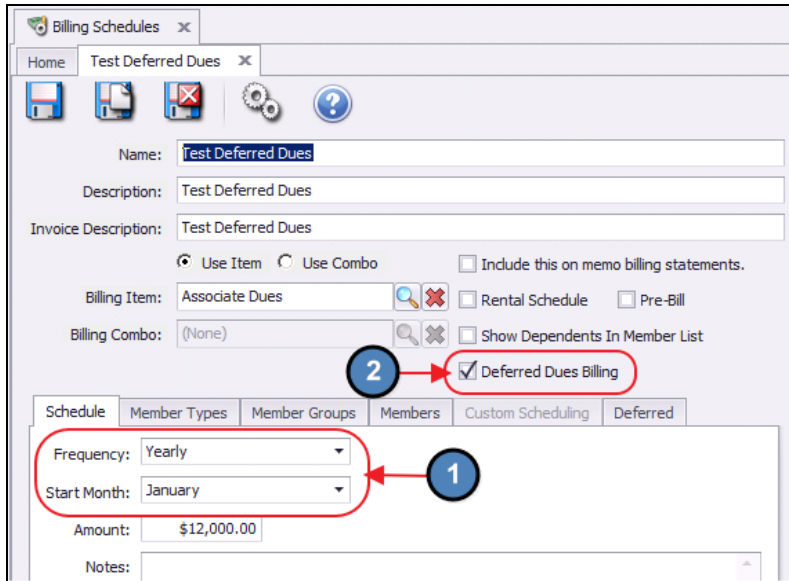
For instance, a \$12,000 Annual Dues billing billed in January 2018 can be recognized January - December 2018. Essentially, once Month End is run in January, AR would be debited the full amount of the billing (\$12,000), the specified Deferred Dues Liability Account would be credited \$11,000, and Dues Income would be credited \$1,000 for the first period of the deferral. The system will then automatically generate Journal Entry Batches moving funds from the Deferred Dues Liability Account to Dues Income for each remaining deferral period.

### **Important:**

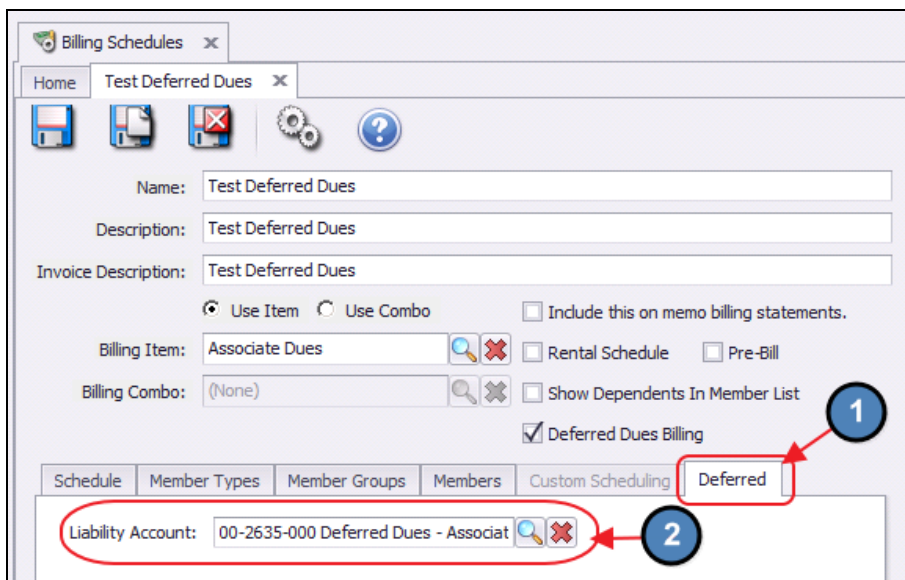
Please note that only Billing Schedules configured with a **Yearly, Semi-Annual, or Quarterly** billing frequency can be setup as a deferred schedule.

## Creating a Deferred Dues Billing

Please follow the same steps as explained above when creating a new Billing Schedule. However, once the **Frequency** of the Billing Schedule is set to **Yearly, Semi-Annual, or Quarterly** the **Deferred Dues Billing** check box will populate. Check this box to indicate the schedule will act as a deferred billing. Please also be sure to select the appropriate **Start Month** of the schedule.



Once the Deferred Dues Billing checkbox is selected, an additional tab will appear called **Deferred**. Please navigate to this tab and select the applicable **Deferred Dues (Liability) GL Account**.



**Note:** Remember to use the **Pre-Bill** option if the Deferred Billing occurs the month prior to the month the revenue may be recognized (ie - December 2017 Billing for January - December 2018 dues).

## Month End

As previously mentioned, once the applicable Month End is run, AR will be debited the full amount of the Billing, the Deferred Dues Liability Account will be credited 11/12 of the full amount of the Billing (if Annual schedule), and Dues Income will be credited 1/12 of the full amount of the Billing.

G/L Posting			
Account		Debit	Credit
00-1200-000 Accounts Receivable			
Ref #	Employee	Description	
550942	ADMINISTRATOR	Capital Assessment	\$60.00 \$0.00
550943	ADMINISTRATOR	Dues - Regular	\$325.00 \$0.00
550944	ADMINISTRATOR	Dues - Social	\$110.00 \$0.00
550945	ADMINISTRATOR	Capital Charge - Assoc. & Social	\$30.00 \$0.00
550946	ADMINISTRATOR	Camp Fee	\$100.00 \$0.00
550947	ADMINISTRATOR	Bag Storage Fee	\$12.00 \$0.00
550948	ADMINISTRATOR	Ladies Full Locker	\$16.00 \$0.00
550949	ADMINISTRATOR	Capital Assessment	\$60.00 \$0.00
550950	ADMINISTRATOR	Dues - Regular	\$325.00 \$0.00
550951	ADMINISTRATOR	Dues - Regular	\$455.00 \$0.00
550952	ADMINISTRATOR	Women's Trophy Fund	\$90.00 \$0.00
550953	ADMINISTRATOR	Bag Storage Fee	\$12.00 \$0.00
550954	ADMINISTRATOR	Ladies Locker Fee	\$20.00 \$0.00
550955	ADMINISTRATOR	Capital Assessment	\$60.00 \$0.00
550956	ADMINISTRATOR	Dues - Regular	\$325.00 \$0.00
550957	ADMINISTRATOR	Dues - Regular	\$900.00 \$0.00
550958	ADMINISTRATOR	Test Deferred Dues	\$12,000.00 \$0.00
550959	ADMINISTRATOR	Capital Assessment	\$60.00 \$0.00

G/L Posting			
Account		Debit	Credit
00-1200-000 Accounts Receivable		\$539,474.95	\$0.00
00-1240-000 Notes Receivable		\$0.00	\$20,056.00
00-1260-000 Deferred Initiation Fees		\$0.00	\$4,500.00
00-2600-000 Deferred Dues - Regular		\$0.00	\$273,655.00
00-2610-000 Deferred Dues - Intermediate		\$0.00	\$675.00
00-2620-000 Deferred Dues - Junior		\$0.00	\$6,174.00
00-2625-000 Deferred Dues - Non-Resident		\$0.00	\$343.00
00-2630-000 Deferred Dues - Tennis		\$0.00	\$39,100.00
00-2635-000 Deferred Dues - Associate			
Ref #	Employee	Description	
550958	ADMINISTRATOR	Test Deferred Dues	\$0.00 \$11,000.00
551586	ADMINISTRATOR	Dues - Associate	\$0.00 \$343.00
551703	ADMINISTRATOR	Dues - Associate	\$0.00 \$343.00
Total 2635 Deferred Dues - Associate			\$0.00 \$11,686.00

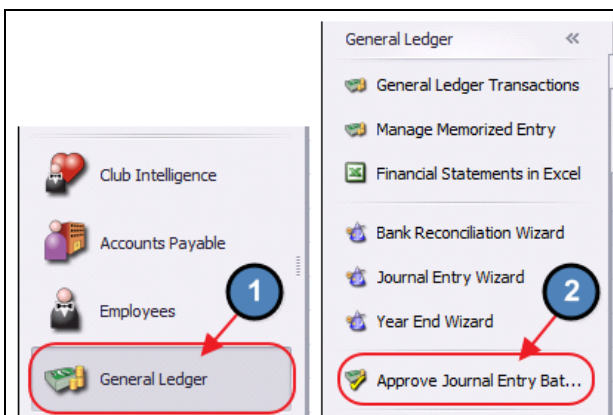
G/L Posting			Debit	Credit
Account				
00-1200-000	Accounts Receivable		\$539,474.95	\$0.00
00-1240-000	Notes Receivable		\$0.00	\$20,056.00
00-1260-000	Deferred Initiation Fees		\$0.00	\$4,500.00
00-2600-000	Deferred Dues - Regular		\$0.00	\$273,655.00
00-2610-000	Deferred Dues - Intermediate		\$0.00	\$675.00
00-2620-000	Deferred Dues - Junior		\$0.00	\$6,174.00
00-2625-000	Deferred Dues - Non-Resident		\$0.00	\$343.00
00-2630-000	Deferred Dues - Tennis		\$0.00	\$39,100.00
00-2635-000	Deferred Dues - Associate		\$0.00	\$11,686.00
00-2645-000	Deferred Dues - Social		\$0.00	\$28,270.00
00-2655-000	Deferred Lockers		\$0.00	\$13,676.00
00-2715-000	Hole-In-One Fund		\$0.00	\$10.00
00-2720-000	Womens Golf Fund		\$0.00	\$104.00
00-2780-000	NCGA Handicap		\$0.00	\$720.00
00-4000-010	Dues - Regular		\$0.00	\$459.00
00-4002-010	Dues - Associates		\$0.00	\$1,000.00
Ref #	Employee	Description		
550958	ADMINISTRATOR	Test Deferred Dues	\$0.00	\$1,000.00
Total 4002 Dues - Associates			\$0.00	\$1,000.00

(When using Pre-Bill, full amount will go to A/R and Liability Account in month 1, and then, will be recognized appropriately in the following months).

## Journal Entry Batches

As previously explained, once the Month End Batch has been posted, the system will then automatically generate Journal Entry Batches moving funds from the Deferred Dues Liability Account to Dues Income for each remaining deferment period.

To access these Journal Entry Batches, please navigate to **General Ledger** on the left user menu and select **Approve Journal Entry Batches**.



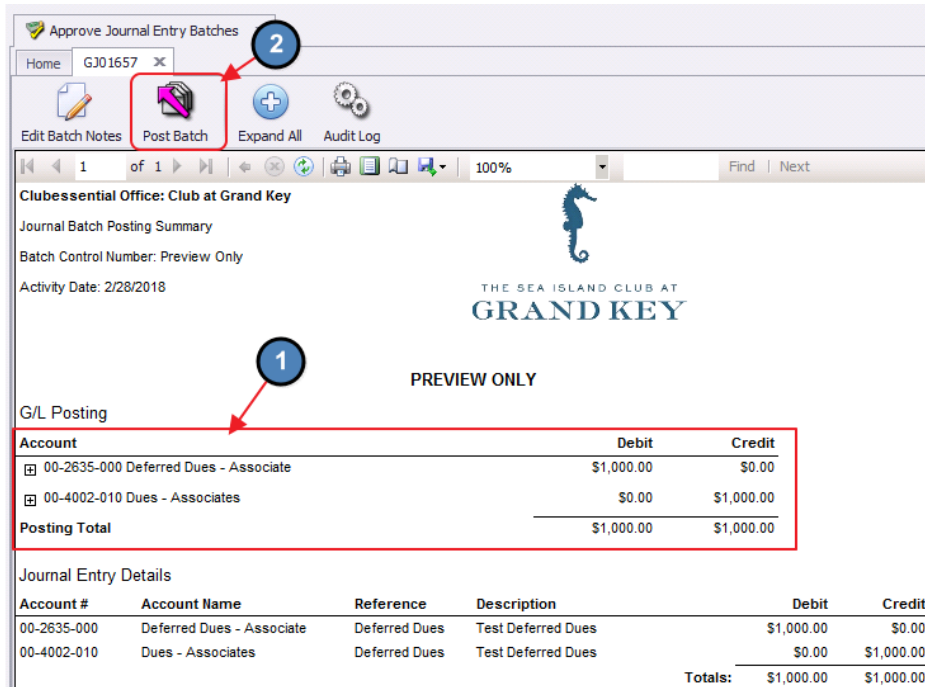
The Approve Journal Entry Batches Grid will launch. Each Journal Entry Batch created when the Month End Batch was posted will appear.

Transaction Date	Batch Control Number	Amount	Posted	Posted Date	Year End Batch	Note
<b>12/31/2018</b>	<b>GJ01667</b>	<b>\$1,000.00</b>	<input type="checkbox"/>		<input type="checkbox"/>	
11/30/2018	GJ01666	\$1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	
10/31/2018	GJ01665	\$1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	
09/30/2018	GJ01664	\$1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	
08/31/2018	GJ01663	\$1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	
07/31/2018	GJ01662	\$1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	
06/30/2018	GJ01661	\$1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	
05/31/2018	GJ01660	\$1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	
04/30/2018	GJ01659	\$1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	
03/31/2018	GJ01658	\$1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	
02/28/2018	GJ01657	\$1,000.00	<input type="checkbox"/>		<input type="checkbox"/>	

Click to select the next applicable Batch based on the deferment period and click, **Post Batch**.

Transaction Date	Batch Control Number	Amount	Posted
12/31/2018	GJ01667	\$1,000.00	<input type="checkbox"/>
11/30/2018	GJ01666	\$1,000.00	<input type="checkbox"/>
10/31/2018	GJ01665	\$1,000.00	<input type="checkbox"/>
09/30/2018	GJ01664	\$1,000.00	<input type="checkbox"/>
08/31/2018	GJ01663	\$1,000.00	<input type="checkbox"/>
07/31/2018	GJ01662	\$1,000.00	<input type="checkbox"/>
06/30/2018	GJ01661	\$1,000.00	<input type="checkbox"/>
05/31/2018	GJ01660	\$1,000.00	<input type="checkbox"/>
04/30/2018	GJ01659	\$1,000.00	<input type="checkbox"/>
03/31/2018	GJ01658	\$1,000.00	<input type="checkbox"/>
<b>02/28/2018</b>	<b>GJ01657</b>	<b>\$1,000.00</b>	<input type="checkbox"/>

A Batch Preview will populate. As you will see, funds are debited out of the Deferred Dues Liability Account and credited to Dues Income. Select **Post Batch**.

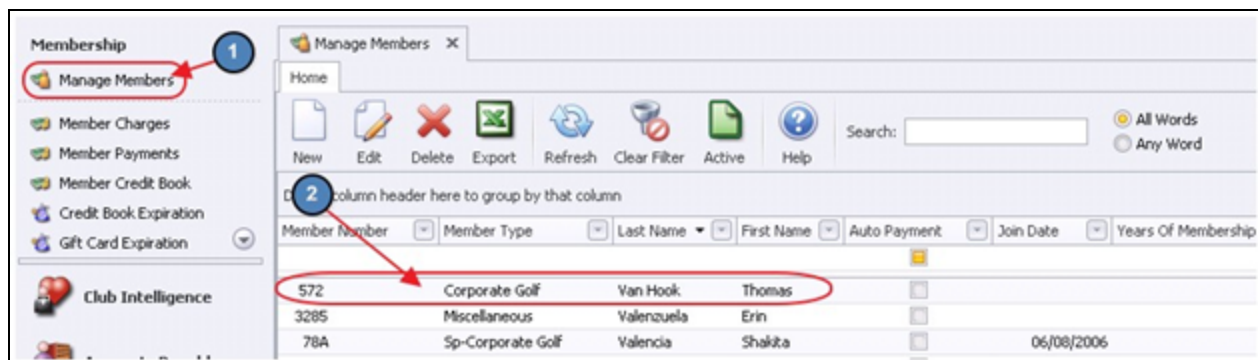


Users have the option to Post all Journal Entry Batches now or during the applicable deferment period. If the user elects to Post all Batches now, please note that the GL will not be impacted until the Transaction Date/ deferment period of the Batches.

## Billing Summary in Member Profile

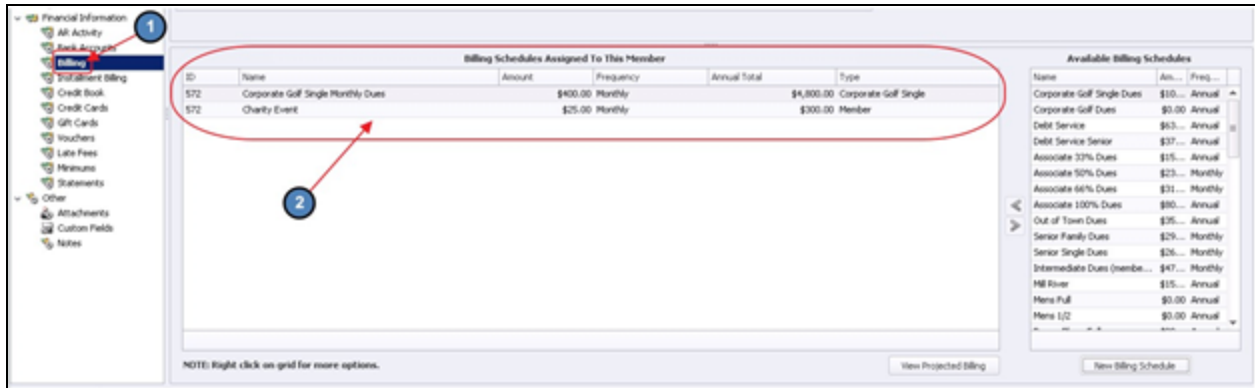
A summary of the Billing Schedules applied to a Member (whether via Member Group, Member Type, or Individual Member application) is available on the Billing Tab within the Member's profile.

To access this tab, please navigate to the **Manage Members Grid** and select the Member in question.





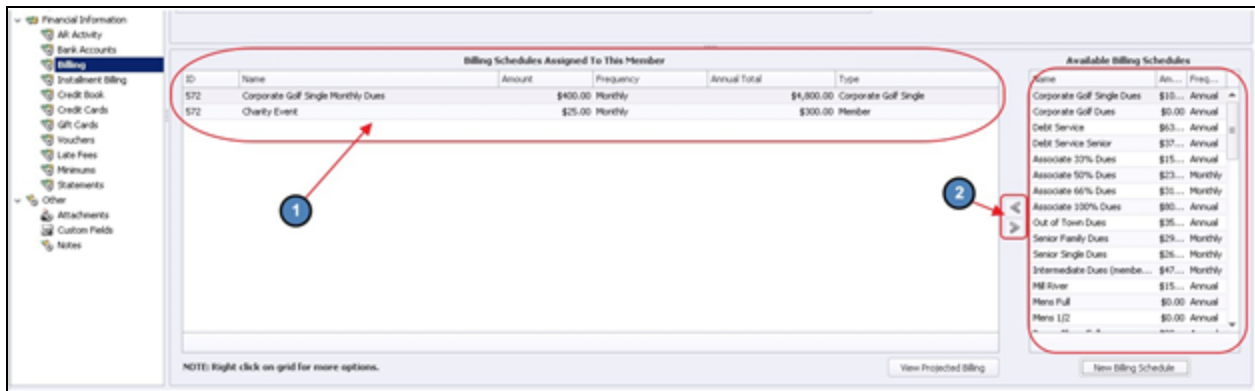
Select **Billing** on the left pane within the member's profile. A list of the Billing Schedules applied to the member will populate.



While it is most efficient and effective to add **Billing Schedules** at the **Member Group** and **Member Type** level, it is possible to add and delete Billing Schedules specific to the Member on this tab. Assigned Billing Schedules are on the left. Available Billing schedules are on the right.

Assign a schedule by selecting an Available schedule and clicking on the Left Arrow.

Conversely, to un-assign a schedule, click on the Assigned schedule, and then click the Right Arrow.



**Important:** The un-assign function applies only to the Billing Schedules assigned at the Member level, and will not work for those assigned at the Member Group or Member Type level. To determine the level at which the Billing Schedule is applied, refer to the Type column. If the Billing Schedule is applied at the Member Group or Member Type level, the name of the Group or Type will be listed. If the schedule is applied on an individual member basis, **Member** will be listed in the Type column.

Billing Schedules Assigned To This Member						
ID	Name	Amount	Frequency	Annual Total		Type
572	Corporate Golf Single Monthly Dues	\$400.00	Monthly	\$4,800.00	1	Corporate Golf Single
572	Charity Event	\$25.00	Monthly	\$300.00	2	Member

Additionally, a new Billing Schedule can be created within the member’s profile. To do so, click the **New Billing Schedule** button.

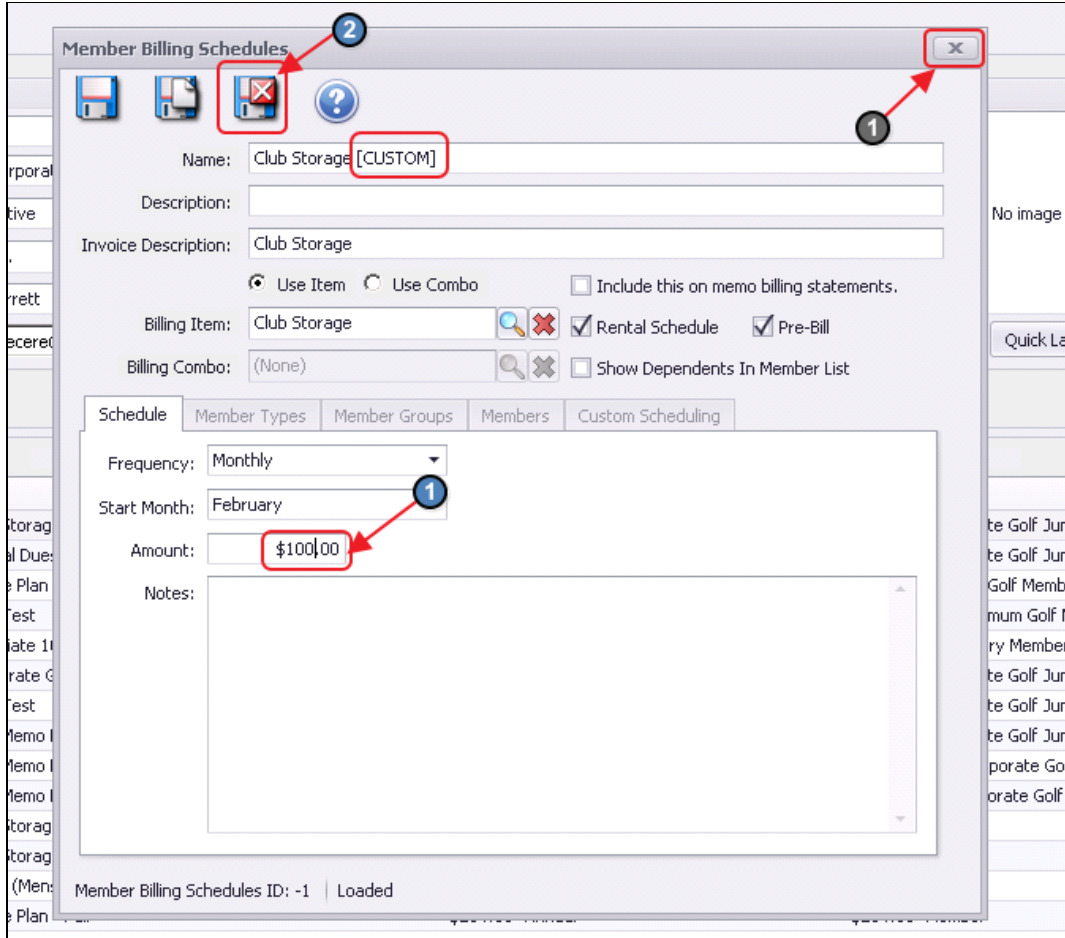
Available Billing Schedules			
Name	Am...	Freq...	
Corporate Golf Single Dues	\$10...	Annual	▲
Corporate Golf Dues	\$0.00	Annual	
Debt Service	\$63...	Annual	☰
Debt Service Senior	\$37...	Annual	
Associate 33% Dues	\$15...	Annual	
Associate 50% Dues	\$23...	Monthly	
Associate 66% Dues	\$31...	Monthly	
Associate 100% Dues	\$80...	Annual	
Out of Town Dues	\$35...	Annual	
Senior Family Dues	\$29...	Monthly	
Senior Single Dues	\$26...	Monthly	
Intermediate Dues (membe...	\$47...	Monthly	
Mill River	\$15...	Annual	
Mens Full	\$0.00	Annual	
Mens 1/2	\$0.00	Annual	

**New Billing Schedule**

**Note:** Within the **Billing Schedules Assigned To This Member** grid, there are shortcuts to edit/customize a displayed billing. For example a Club wants to temporarily adjust fees being charged to one Member for the next (3) months. To access options, right-click on a listed item. Then, choose Customize Billing Schedule option.

Billing Schedules Assigned To This Member						
ID	Name	Amount	Frequency	Annual Total		Type
133	Pull Cart Storage	\$0.00	Monthly	\$0.00	1	Pull cart storage
133	Hole in One	\$25.00	Quarterly	\$100.00	2	Hole In One
133	Bag Storage	\$12.00	Monthly	\$144.00		Bag Storage
133	Capital	\$60.00	Monthly	\$720.00		Regular
133	Dues - Regular	\$325.00	Monthly	\$3,900.00		Regular
133	Camp Fee	\$1,000.00	Custom	\$1,000.00		Member
133	Dues - Regular [CUSTOM]	\$455.00	Monthly	\$5,460.00		Member
133	(Ladies Full Locker)	\$16.00	Monthly	\$192.00		Rental

Screen will launch (on top of existing window) for editing. Note: **[CUSTOM]** is added to the name of the billing schedule and changes made in this window **will apply to this Member only**. Once the settings are changed, save and close, or simply close screen to cancel and exit without making changes.

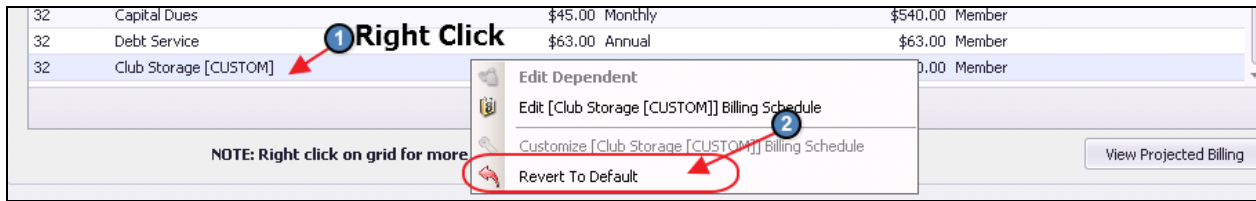


**Caution!** If changes are made in this custom screen, this billing schedule for this Member will no longer be seen by the system as a Member Group or Member Type billing schedule. Instead, it will now be seen by the system as an individual **Member** billing item, and therefore will need to be treated as such until the billing schedule is reverted back to its default state.

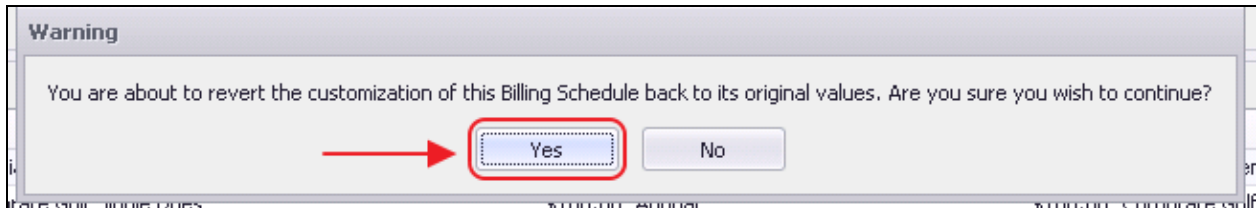
32	Debit Service	\$63.00	Annual	\$63.00	Member
32	Club Storage [CUSTOM]	\$100.00	Monthly	\$1,200.00	Member

**Note:** Other Members attached to the original billing schedule will not be impacted by this change.

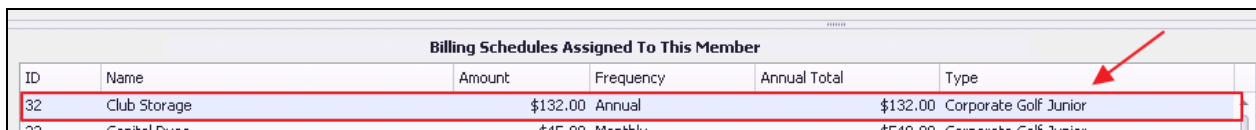
To revert the billing schedule back to its original state (for instance, after the 3 month period has passed), right-click on the custom schedule, and choose **Revert to Default**.



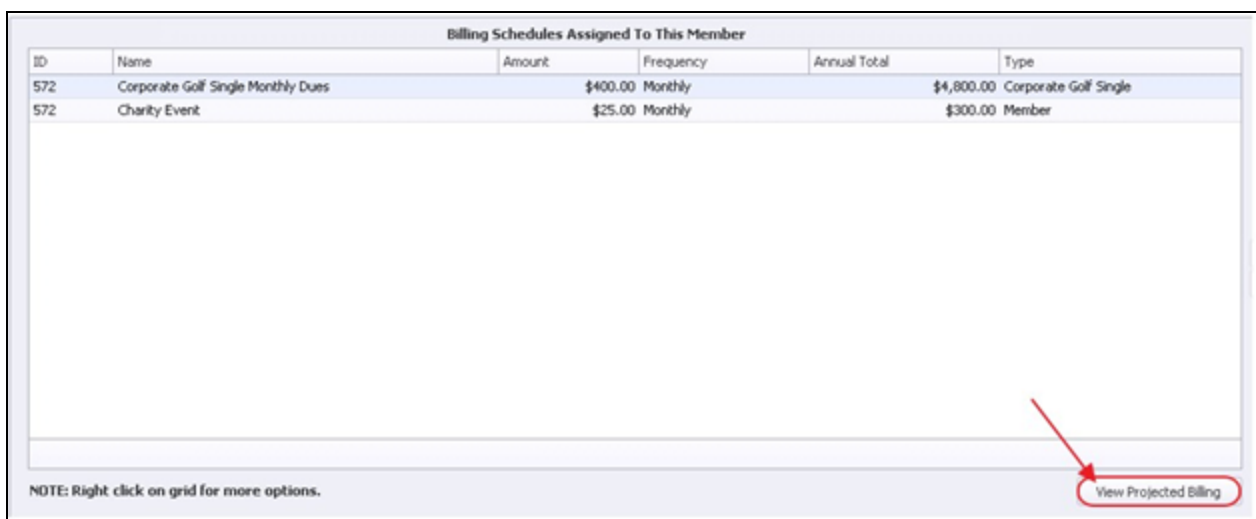
Confirm reversion by clicking **Yes**.



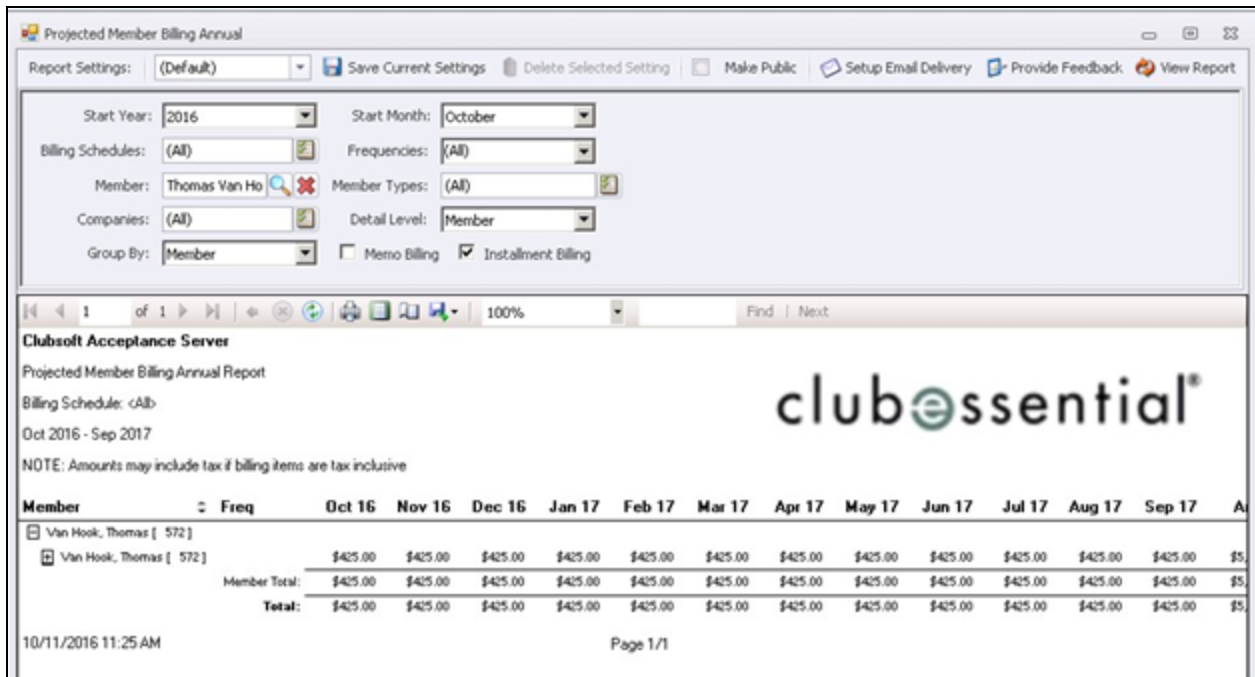
Note, all original settings (including Name, Amount, Frequency and Type), return to the attached billing schedule.



To view projected billing based on future schedules specific to the Member, click **View Projected Billing**.



The Projected Billing Report will launch.



Projected Member Billing Annual Report

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery Provide Feedback View Report

Start Year: 2016 Start Month: October

Billing Schedules: (All) Frequencies: (All)

Member: Thomas Van Ho Member Types: (All)

Companies: (All) Detail Level: Member

Group By: Member  Memo Billing  Installment Billing

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Clubsoft Acceptance Server

Projected Member Billing Annual Report

Billing Schedule: <All>

Oct 2016 - Sep 2017

NOTE: Amounts may include tax if billing items are tax inclusive

Member	Freq	Oct 16	Nov 16	Dec 16	Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug 17	Sep 17	Al
Van Hook, Thomas [ 572 ]		\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$5
Member Total:		\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$5
<b>Total:</b>		\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$425.00	\$5

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## Best Practices

Utilize Member Groups and/or Member Types to more efficiently and effectively assign Billing Schedules to Members.

## Frequently Asked Questions

Why did a Member (who is no longer part of a Group with an attached billing schedule), still get billed for the associated fee?

Members who have had Custom adjustments to their billing schedules will not automatically stop applying when the Member leaves the associated group because the system has deemed this as a Member specific billing schedule when the schedule becomes Custom. To ensure the Member is no longer charged for the fee, go into the Member's profile, Billing Tab, right-click on the billing item (it will say CUSTOM), and click **Revert to Default**. The billing will then automatically drop off the Member's account as they are no longer a Member of the Group, and the default billing schedule was based on membership to the Group.