



Renewals & Drops Checklist

TASK	CONTEXT	WHEN TO COMPLETE	RESOURCES
1 Review Important Dates	The auto-renewal date, transaction date, and invoice due date are set up in the Renewal tab within each member type . The transaction date affects when revenue is recognized in QuickBooks Online.	1-2 months before renewals begin	› Membership Auto-Renewals › Transaction Dates & Payment Terms
2 Review Dues Rules & Settings	Review your dues rates and make adjustments if rates are changing for this upcoming term. Confirm that each dues rule is linked to the correct QuickBooks Online item.	1-2 months before renewals begin	› Setting Up Dues Rules › Update Dues Rules for Next Membership Term › Optional Dues Rules & Product Add Ons
3 Pre-Renewal Data Cleanup	• Census: If any dues depend on custom field values, send a Census for members to review and update those values. • Report: Generate a custom report of current members without a billing contact. • Address Cleanup Tool: Quickly identify and fix missing addresses. • QuickBooks Analyzer: Review duplicates, ambiguous records, and invalid formatting	1-2 months before renewals begin	› Create a Census › Reviewing & Managing Census Responses › Address Cleanup Tool › QuickBooks Analyzer Tool
4 Update Emails	• Renewal Notice Email • Message Displayed on Invoice • Payment Confirmation Email (optional)	Anytime before sending renewals; 1-2 weeks recommended	› Smart Renewal Notices › Message Displayed on Invoice
5 Spot Check Auto-Renewals	Your renewal invoices are ready! Review them in Accounting > Transactions and filter for open dues renewals. If amounts look off, check and update the member data affecting dues on those records. If many are off, review your dues rule setup. After making data or dues rule corrections, recalculate invoices individually or in bulk.	Immediately after invoices are generated, before notices are sent to members	› The Novi Accounting Transactions Section › Tracking Paid Renewals › Recalculate and Update Open Dues Invoices
6 Send Renewal Notice Emails	If not set up to send manually in Member Type > Renewal settings, you can batch-send them from the Transactions list. Remember: Dues invoices appear in the Member Compass even before they're sent.	After generated invoices have been reviewed, if not sent automatically.	› Smart Renewal Notices: How to Send › Member Compass: Pay Balance
7 Drop Unpaid Members	If a member's dues invoice is overdue based on your due date settings, it's time to drop them by following the Non-Renew & Credit process. Don't manually edit expiration dates to drop auto-renewed members.	After the invoice due date passes and grace periods (if any) have expired.	› How to Drop Manually // How to Drop Automatically › Find a List of Dropped Members › Why Novi Credits Invoices