

## **GrowthZone Regional Training – Day Two**

*Please bring your laptop to each training session to participate in hands on exercises.*

**9:00 – 11:30**

### **Setting Up and Managing Your Billing**

- Billing Options & Setting
  - Review Chart of Accounts
  - Review Fee Setup
  - Invoice & Cover Letter Templates
  - Integrated Payment Processing
- Managing Scheduled Billing
- Managing Payments, Refunds, Credits, Write-offs
- Reviewing Billing Reports

**11:30 – 12:30 – Lunch on Own**

**12:30 – 4:00**

### **Engage & Retain your Members**

Successful Event Management

- Initial Event Setup Options
  - Calendar Search Options
  - Registration & Billing Preferences
  - Event Types
- Adding & Customizing Your Events
  - General Information
  - Description/Appearance
  - Adding Fee Items
  - Setting Up Recurring Events
- Managing Attendees
- Billing for Events