V9 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
  - o Review Chart of Accounts
  - o Review Fee Setup
  - o Invoice & Cover Letter Templates
- Managing Batch Invoicing
- Integrated Payment Processing
- Managing Payments, Refunds, Credits, Write-offs
- Reviewing Billing Reports & Journal Entries

11:30 – 12:30 – Lunch on Own

12:30 – 4:30

Engage & Retain your Members

Successful Event Management

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