

OPERATE GREENFIELD ONBOARDING

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Onboarding workflows
 Invoice template check
Operate Charges / Payments (2 trainings)
 Adding fixed fees (licences)
 Adding variable fees & calendar bookings / Connect Call Charges
 Accounts Receivable / Payments
Operate Portal Training (2 trainings)
 Portal overview
 Templates check
 Contact access levels / workflows
 Invite existing members to portal
 Troubleshooting

FIRST FULL MONTH LIVE
 Monthly Billing (1st bill run and collections)
 Moves Adds Changes / licenses advanced
 Reports overviews
 Financial Exports / Payments

ADOPTION STAGE CHECK IN
 Weekly Check in
 Month 2 Check in
 Month 3 Check in

