

Start Your Semester Off Right: Here's Your Kickoff Checklist

Welcome to a new semester! We know the responsibilities of a chapter officer can feel daunting, but not to worry, greekbill is here to help! Set yourself up for success with our Best Practices Guide for the start of the semester.



01 Make Sure Your Roster is Current

Review your chapter roster and make any necessary updates to the member information. Members who have graduated or resigned should have their membership status updated accordingly. This will assist in ensuring no one is charged incorrectly for dues/fees.



02 Clear Accounts Receivable

Review outstanding balances for all members. Do your Alum/Non-members have outstanding balances still owed to the chapter? Staying on top of past-due balances is key to having a high collection rate.



03 Simplify Contracts

Contracts can be created using our intuitive built-in tool straight from your admin account. If your chapter already has a contract, simply copy and paste the text onto the contract creator and you're all set!



04 Order Your Purchase Card *(if applicable)*

Purchase cards allow you to:

- ✓ Load & unload chapter funds
- ✓ Manage who can spend chapter funds
- ✓ Monitor your chapter's spending all while having your transactions automatically recorded
- ✓ Eliminate member reimbursements
- ✓ The greekbill purchase card syncs with the financial platform, making expense management simple.



05 Create Member Group

Member Groups are designed to group like-members. For example Live In, Live Out, and New Members.



06 Speed Up Billing with Charge Groups

Charge Groups are designed to group charges. This is ideal if you're going to assign multiple charges to a lot of the same people.



07 Alleviate Stress with Payment Plans

Relieve the financial stress of making large payments by billing your members in monthly installments.



10 Don't Wait! Stay On Top of Adding New Members

Add New Members to your roster immediately. This will then allow you to begin billing them their needed charges.



08 Itemize Charges so Members Understand What They're Paying

Charges such as Member Dues, National Dues, Rent, Meal Plans, Social Events, T-shirts, etc. can all be itemized.

This will provide members with a clear description of what your chapter is charging when invoices are sent.

Contact the greekbill Client Support Team for additional assistance at officersupport@greekbill.com or 800.457.3816.



09 Sync Your Bank Account to Save Time

With Bank Sync, the greekbill system can pull transactions from your bank and instantly reflect them on your account.