

October 27-30th

DAY ONE

Building the Framework

- Project Plan Overview
- Halo Navigation & Advanced Settings
- Organization Config, Customer & User Import
- Integrations Discussion
- Contract Strategy & Billing Plans
- Recurring Invoice Strategy
- PDF Templates & Reporting

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DAY TWO

Process Theory

- Go-Live Tactics & Migration
- Automating Client Onboarding (Runbooks & Events)
- Billing & General Settings
- Email & Alerting Structure
- Calendar & Resource Management
- Tickets as Forms & Contextualized Data
- ITIL Alignment
- Workflow Building & Platform Navigation

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DAY THREE

Mastering Operations

- Ticket Settings Deep Dive
- Time Tracking & Management
- Expenses, Billing & Invoicing
- Quoting & Orders (Quote-to-Cash Automation)
- Ticket Relationships & Management

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DAY FOUR

Designing for Clarity

- Intuitive User Design
- Status & Action Color Alignment
- UX Constraints & Contextual Design
- Views, Lists & Filter Profiles
- Custom Fields & SQL Lookups
- Parent/Child Strategy (Projects, Approvals, Layouts)