

ChamberMaster/ MemberZone Event Management

Agenda

- Sending Invitations
- Manage Registrations
- Manage the Guest List
- Event Sponsors
- Event Reports
 - Name Tags
 - Check-in Roster
 - Custom Fields
- Event Accounting



Events Module

- Calendar
- Event information
- Event Fees
- Sponsors
- Guest List
- Event Account information
- Tasks
- KB: Overview of Events Module

Add Invitations for Harvest Festival 2023

Add Invitees

- › [Create a new person or company entry](#)
- › [Add individuals from a past event](#)
- › [Add sponsors from a past event](#)

Add Members

- › [Add members by membership status](#)
- › [Add members by membership type](#)
- › [Add members by directory category](#)
- › [Add members by name](#)
- › [Add members by zip/postal code](#)
- › [Add members by location](#)
- › [Add members by Join Date](#)

Add Representatives:

- › [Add representatives by type/status](#)
- › [Add representatives by mem class](#)
- › [Add representatives by group](#)
- › [Add representatives by member](#)
- › [Add representatives by name](#)
- › [Add representatives by zip/postal code](#)
- › [Add representatives by location](#)
- › [Add representatives by Join Date](#)

Invitations




Type	Company	Invitee
Add invitations using the links to the left.		

Managing Attendees






- Create Invitations
- KB: Send Invitations
- Accept or decline invitation on member's behalf
 - Comment
- KB: Manage Invitee List
- Overview of Working with the Guest List





Understanding the various icons of your Guest List.



Action buttons:





-  = Edit Attendee contact info, custom fields, record association
-  = Edit Registration, status, fees and additional fees, primary contact, resend confirmation
-  = Make payment or change payment info; grey color if zero balance

Meaning of colored action buttons:

-  = Payment has been made in full.
 -  = Payment has not been made in full. Click to record/make the payment.
 -  = Attendee is fully associated with a record in your database.
 -  = Attendee needs to be associated with a record in your database. Click to edit and associate.
 -  = Attendee is associated with a member record, but not a rep record.
- Ideally all attendees should be associated with a rep record to provide the best reporting. Exceptions would be if you have a non-member attendee that doesn't exist in the database and you are associating them with a generic member record (such as Non-Member Event member record)

   = if all the action buttons are greyed out, this attendee has not yet been registered; click the  sign in the Status column to initiate the registration process

 **Attendee Company**
 Registrant Company Name = The (S) indicates the registered attendee is also a Sponsor.

-  = email attendees
-  = run report such as Guest List, roster, name tags, labels
-  = Download guest list to .CSV format (usable in Excel)
-  = Delete selected attendees

Note: Deleting attendees from the Guest List, which will alter billing amounts and affect historical reports, is not permitted from the Guest List when:

- A receipt has been created
- An invoice has been created
- A credit card has been marked as paid
- The registration has a fee with "reserved" attendees (i.e. table of 8 that requires 8 attendees)

A better option would be to cancel the registration which can be done by editing their registration.

Waiting Lists

- Enable waiting list on the General tab
 - If you have reached the Limit Attendee Count To number, people wishing to register for the event notified event full
 - Asked if they would like to be placed on a waiting list
- KB: Working with the Waiting List

Manage Waiting List ✕

[Add to Waiting List](#) [Download List](#)

Date/Time Added	Guest	Company	Email Address	Phone	Qty	Actions
3/7/2022 3:33 PM	Andy Kadlec	Andy Kadlec	andy.kadlec@mailinator.com	(218) 555-5555	3	Register Remove
7/29/2022 8:55 AM	Arthurr Dent	Restaurant At The End Of The Universe	none4321434@mailinator.com	(218) 123-4567	5	Register Remove
7/29/2022 8:55 AM	Bill Snyder	Snyder Auto Group	testtestsara@mailinator.com	(419) 599-1015	3	Register Remove
7/29/2022 8:56 AM	Bon Jovi	Subway Nisswa	none@mailinator.com	(218) 000-0000	4	Register Remove

[Done](#)

Edit Attendee Information

- Change/update attendee information
 - Add additional attendee information
 - Update custom fields
- Edit Attendee Icon
- KB: [Edit Attendee](#)

Edit an Attendee

* Required fields

Show Mailing Address

First Name: **Last Name: ***

Company Name: **Title:**

Email:

Phone:

Comments:

Record Association

This record is not associated with a member or representative. ⓘ

Primary contact: Sandra Dee

Cancel Registration

- Edit Registration icon
- Change status to cancelled
- Write-off, Refund, or Credit Registrant if needed
 - Reference number on Guest List indicates transaction created
- KB: [Cancel Registration](#)


The screenshot shows the 'Edit Registration' interface. At the top, there is a 'Registration Information' section with a 'Status:' dropdown menu. The dropdown is open, showing options: 'Registered', 'Invitation Declined', 'Registered', 'Canceled' (highlighted in blue), and 'Sponsor Only - Not Attending'. Below this is the 'Attendee Information' section, which includes a table with columns for 'Attendee Information', 'Choose one', 'Pricing Details', and 'Total'. The table has two rows. The first row shows 'Joanna' in the 'Attendee Information' column, 'Parks' in the 'Choose one' column, 'Golf Team of 4' in the 'Pricing Details' column, and '400.00' in the 'Total' column. The second row shows 'Roxie's Rascals' in the 'Attendee Information' column, 'joanna@mailinator.com' in the 'Choose one' column, and '2 of 4' in the 'Pricing Details' column. There are 'Additional' and 'Attendee' buttons at the bottom of the table. The interface also includes 'Pricing Details' and 'Total' links.

Working with Sponsors

- Sponsors added two ways:
 - Through database
 - Added automatically when selecting registration fee designed to automatically add as sponsor
- KB: Working with Sponsors
- KB: Event Sponsor Web Display Options
- KB: Create Sponsorship Levels for Events

Sponsor Web Display Options

Click the Sponsor name in the List of Sponsors above to edit the Sponsor Web Display Options.

Image Type	Image	Action
Sponsor Logo <i>i</i>		Change Image Remove Image

Logo Link URL: [Use Member Website](#)

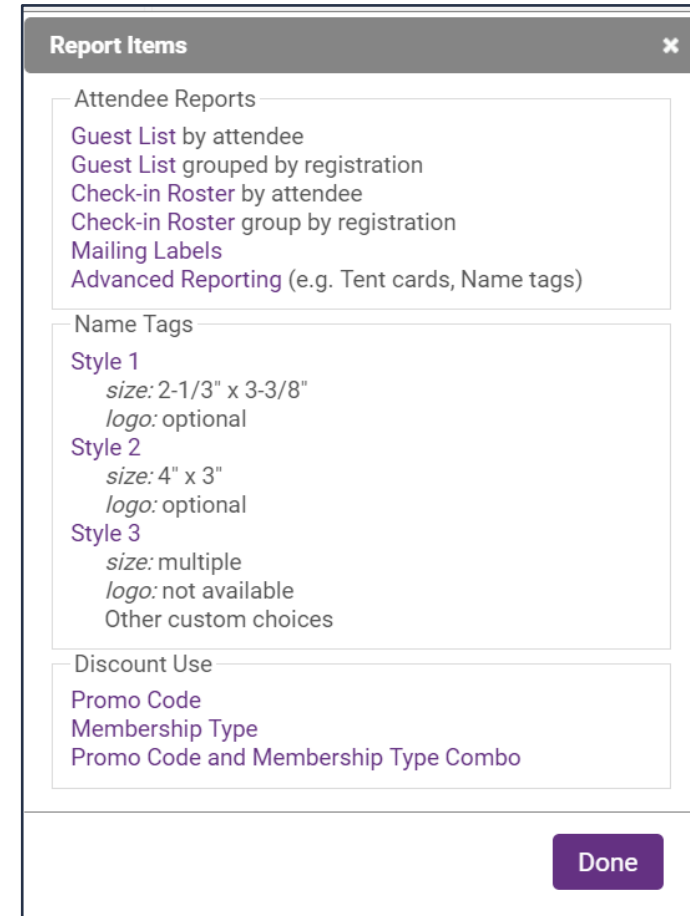
Logo Placement: *i*

Sponsorship Level: [Edit Sponsorship Levels](#)

Logo Sort Order:

Event Reports and Labels

- Reports, labels, and downloads available at the bottom of several the lists
 - Name Tags
 - Check-in Rosters
 - Mailing Labels
- KB: Create Event Name Tags
- KB: Event Additional Fee Items Report



Checking In Attendees

- Print roster
- Manually check in guests
- Check guests in from Registered Attendee Info section of Guest List Summary
- Quicky and easy check-in using Staff App and QR codes
- KB: Mark Registrants as Attended

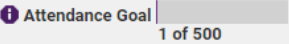
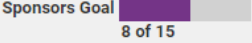
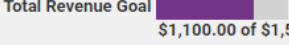
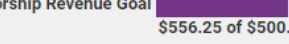
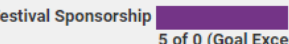
Event Attendance
2022 Golf Tournament

<input type="checkbox"/>	<u>Company Name</u>	<u>Attendee First Name</u>	<u>Attendee Last Name</u>	<u>Primary Contact Company</u>	<u>Attendee Comments</u>
<input type="checkbox"/>	A Place For Dogs	Josie	Jenkins	A Place For Dogs	
<input type="checkbox"/>	A Place For Dogs	Josie	Jenkins	A Place For Dogs	
<input type="checkbox"/>	ABC Company	Blye	Johnson	ABC Company	
<input type="checkbox"/>	Ace Hardware	Howard	Beyer	Ace Hardware	
<input type="checkbox"/>	Anthony's on Main	Anthony	Mane	Anthony's on Main	
<input type="checkbox"/>	Barry's Boats	Barry	Harley	Barry's Boats	
<input type="checkbox"/>	Barry's Boats	Debbie	Dollar	Barry's Boats	
<input type="checkbox"/>	Bobber Gifts	Dale	Lund	Bobber Gifts	
<input type="checkbox"/>	Custom Cabinets	Shane	Koglin	Custom Cabinets	
<input type="checkbox"/>	Dietrich Farms	Lloyd	Caine	Dietrich Farms	
<input type="checkbox"/>	Kay's Toy Trains	Kay	Koglin	Kay's Toy Trains	
<input type="checkbox"/>	Lifetime Eye Care	Don	Caine	Lifetime Eye Care	
<input type="checkbox"/>	The Prairie Bay Restaurant	David	Buchanan	The Prairie Bay Restaurant	
<input type="checkbox"/>	Tie Dye Designs	Amy	Richter	Tie Dye Designs	

Save Print Download Close

Event Account Information

- Running totals of income billed and paid
- Total registrations and total registered guests
- Actual Attendance
- Invitations
- List of sponsors for event
- KB: [View Account Information](#)

Harvest Festival 2022	
General Summary	
Harvest Festival 2022	
11/30/2022	
Total Event Fees <i>(includes No Charge registrations)</i>	1312.50
Total Cancelled Fees	127.50
Total Income Billed <i>(Tax not included)</i>	1142.50
Total Income Paid <i>(Tax not included)</i>	766.25
Total Registrations	23
Total Registered Guests	29
Actual Attendance	1
Charge by Payment Type <i>(Tax included)</i>	
No Charge	85.00
Credit Card	627.50
Invoice	451.25
Cash or Check	21.25
Payment Due - Credit Card	0.00
Payment Due - Invoice	312.50
Payment Due - Cash or Check	21.25
Attendance Goal 	
Sponsors Goal 	
Total Revenue Goal 	
Sponsorship Revenue Goal 	
Sponsorship Fee Items	
Fall Festival Sponsorship 	

Event Invoicing

- Easily create and deliver invoices directly from the Event Account Tab
 - Need to have invoicing of event registrations permission set
- KB: Create Event Invoices

Create Invoices

Batch Type: Event ? A/R Account: Accounts Receivable

Event Name: Business Expo (Jan 28, 2023)

Bill To: All event registrations marked for invoicing.
Address To: Registrant
Line Item: Event Name + Attendee Name
 Display uninvoiced registrations only.

Invoice Date: 12/22/2022
Invoice Number: 891
P.O. Number:
Date Due: 12/22/2022
Payment Terms: Due on receipt

Message: Download the Staff App! edit

Default Class: Use class assigned to event fees

New Batch This invoice batch has not yet been saved.

Batch Name: Event Fees for Business Expo Find Batch

Invoices in Batch						
<input type="checkbox"/>	Output	Registrant	Invoice Items	Status	Tax	Amount
<input type="checkbox"/>	None	Lifetime Eye Care	1.00 Event Registration -0.10 Event Registration	New	Non	0.90
<input type="checkbox"/>	None	MicroMachines of West Michigan	1.00 Event Registration -0.10 Event Registration	New	Non	0.90
<input type="checkbox"/>	None	ProStaff	1.00 Event Registration -0.10 Event Registration	New	Non	0.90

Future Training

- Check out the [Training Calendar](#) to register for your continued and future training!

ChamberMaster/MemberZone Training


Start Date End Date

Category

Search

Upcoming Events

[« Switch to Calendar View](#)



Solution Overview--ChamberMaster/MemberZone | Wednesday, January 2, 2019

The ChamberMaster Member Management Software is powerful, easy-to-use and designed to manage all the day-to-day operations of your organization. This session will provide you with an overview of the software, so that you can take full advantage of its capa

TRAINING WORKSHOP

Questions?