

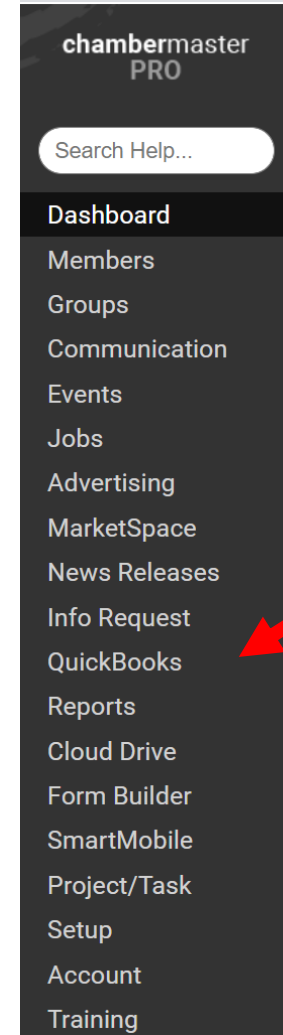
Switching from CQI? 5 Benefits of Integrated Billing!



5 Benefits of Switching to Integrated Billing

This session is intended for customers who are using our legacy CQI product to learn about the benefits of switching to Integrated Billing

- ✓ If your menu options display QuickBooks vs. Billing you are using the CQI legacy product



5 Benefits of Switching to Integrated Billing



1. Dependence on CQI is no longer needed
2. Easily generate & track membership renewal invoice
3. Member balances are always up-to-date
4. Allows for implementation of GrowthZone Pay
5. Members can view & pay invoices via the MIC

1... Dependence on CQI is no longer needed!



- ✓ Dependence on CQI (the interface between ChamberMaster and QuickBooks), is no longer needed.
- ✓ Updates to your QuickBooks software or the speed of your internet will not affect the connection with ChamberMaster
- ✓ No software installs or updates when technology changes
- ✓ No need to incur the expense of additional QB licenses to allow all staff to review member transactions

2. Easily generate & track membership renewal invoices



All renewal invoicing can be done directly in your ChamberMaster software and the system will notify you when invoices for renewals need to be generated! WIKI: [Processing Recurring Member Dues Invoices](#)

Uncreated Invoices

Switch to a different month to see outstanding invoices for another month. Recurring and Group batches below display outstanding invoices only for the month selected. Event and One-time fees are not specific to a particular month; they will always display here until created or cleared. Note: only active members are include in the recurring invoices quantity. If you bill members with other statuses, the Task List will not include those in the count. Set your default month under Setup->Billing Options and Settings.

Assigned fees for:

Recurring Fees Batches			
Batch Group	epayments	Pending	Action
Default	No	29	create invoices

2. Easily generate & track membership renewal invoices



Delivery of invoices is made easy, and you will have a record of the communication right in your ChamberMaster software

Correspondence History					
Subject	Date	Follow-Up	Task	Contact	Association Rep
Invoice from ChamberMaster/MemberZone Training	2/22/2021	add follow-up		Sayali Botts	Gerry
Update your Membership Information	1/17/2020	add follow-up		Tony Amore	Train81 Train81
Enter Web Content	1/12/2020	add follow-up		Tony Amore	Hunter Grayson
Update your Listing	5/28/2020	add follow-up		Tony Amore	Eileen Jones
Update Your Company Information!	5/28/2020	add follow-up		Tony Amore	Eileen Jones
Customer Referral from V9 Training DB	5/5/2020	add follow-up	eReferral	50 recipients	Train60 Train60
Post Web Content Today	5/5/2020	add follow-up	New Members	61 recipients	Hunter Grayson
2020 Easter Egg Hunt	4/10/2020	add follow-up		Tony Amore	Hunter Grayson
2020 Easter Egg Hunt	4/10/2020	add follow-up		Tony Amore	Hunter Grayson
Post Hot Deals Today	4/7/2020	add follow-up	Membership	Tony Amore	Train81 Train81

3. Member balances are always up-to-date

- ✓ Reporting in ChamberMaster will easily provide view into the status of member balances
- ✓ No need to refresh member-by-member or as a group – all balances reflect the invoices, payments, and receipts as they are recorded

Member Management

General Reps Web Communication Account Stats Benefit Tracking Advanced Marketing

Beautiful Home Remodeling Sign in as this Member

Save Cancel

General Information

Total Balance: \$700.00

Dues/Fees Balance: \$700.00

Available Credit: \$100.00

Billing Contact: [Peter Mays](#)
Crosby, MN 56441
2-181-230-7654 (work)

change billing rep
remove billing rep

Billing Notes:

Renewal Month: November

Billing Preference: Print

Tax Exempt: No

Account Name/ID: Use Member ID

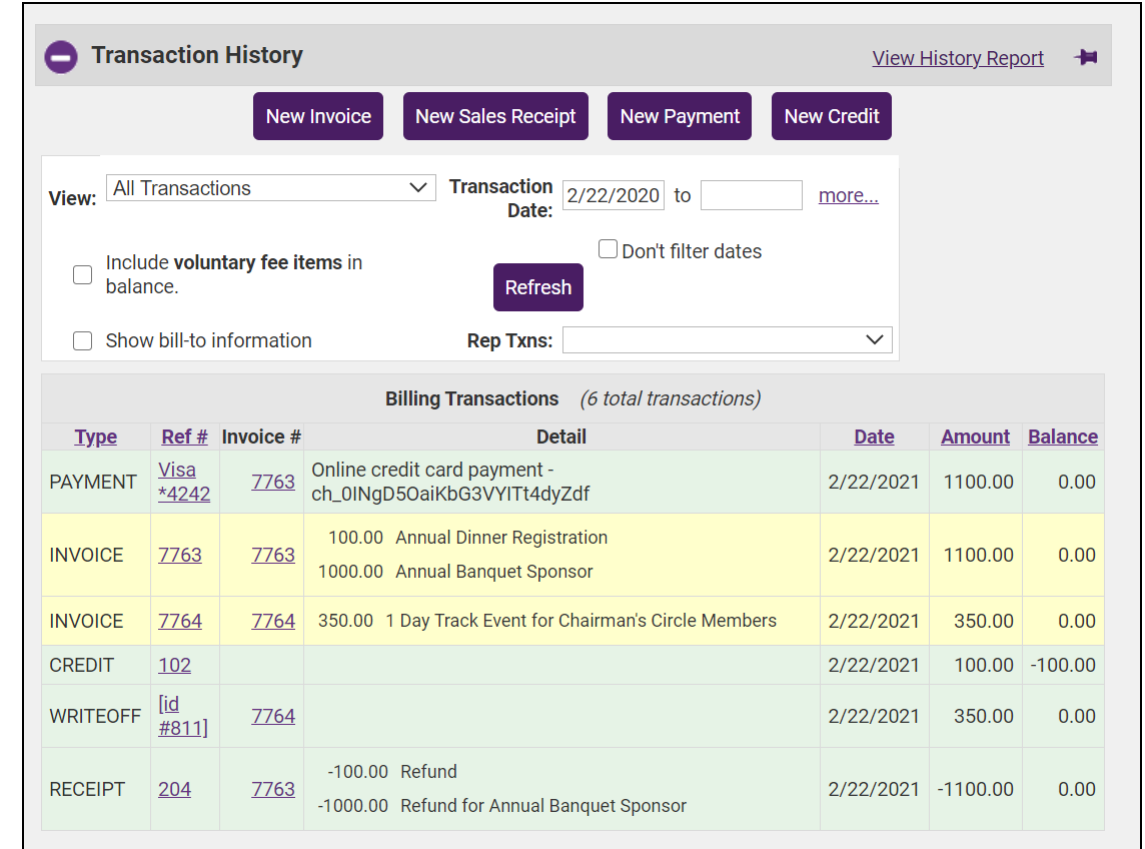
Membership Fees & Dues

Membership Fees & Dues
Drag fees in the order you want them to appear on the invoices when you run invoice batches and click "Save".

Name	Bill-To Override	Description	Qty	Frequency	Next Billed*	Day Charged	Amount**	
Corporate Membership		Corporate Membership Dues 2020	1	Annually	Nov 2021	N/A	\$450.00	<input type="checkbox"/>

3. Member balances are always up-to-date

- ✓ All transactions can be performed within the ChamberMaster database and are tracked on your member's account tab. No need to switch from software to software
- ✓ WIKI: [Transaction History](#)



The screenshot shows the 'Transaction History' page. At the top, there are buttons for 'New Invoice', 'New Sales Receipt', 'New Payment', and 'New Credit'. Below these are filters for 'View' (set to 'All Transactions'), 'Transaction Date' (set to '2/22/2020'), and a 'Refresh' button. There are also checkboxes for 'Include voluntary fee items in balance' and 'Show bill-to information', and a 'Rep Txns' dropdown menu. The main content is a table titled 'Billing Transactions (6 total transactions)' with columns for Type, Ref #, Invoice #, Detail, Date, Amount, and Balance.

Type	Ref #	Invoice #	Detail	Date	Amount	Balance
PAYMENT	Visa *4242	7763	Online credit card payment - ch_0lNgD50aiKbG3VYITt4dyZdf	2/22/2021	1100.00	0.00
INVOICE	7763	7763	100.00 Annual Dinner Registration 1000.00 Annual Banquet Sponsor	2/22/2021	1100.00	0.00
INVOICE	7764	7764	350.00 1 Day Track Event for Chairman's Circle Members	2/22/2021	350.00	0.00
CREDIT	102			2/22/2021	100.00	-100.00
WRITEOFF	[id #811]	7764		2/22/2021	350.00	0.00
RECEIPT	204	7763	-100.00 Refund -1000.00 Refund for Annual Banquet Sponsor	2/22/2021	-1100.00	0.00

3. Member balances are always up-to-date!



- ✓ Create & reprint invoices, receive payments, send statements, apply credits right in your ChamberMaster software
- ✓ You will easily be able to identify and resend over-due invoices to your members. WIKI: [Resend Overdue Invoices](#)

ChamberMaster/MemberZone Training
4567 Main Street
Crosby, MN 56441
2185465413
cheri.petterson@growthzone.com

Invoice
Invoice Date: 2/22/2021
Invoice Number: 7763

It's Amore
Sayali Botts
123 South Street
Crosby, MN 56441

Thank you for your continued membership!

		Terms	Due Date
		Due on Receipt	2/22/2021
Description	Quantity	Rate	Amount
Annual Dinner Registration	1	\$100.00	\$100.00
Annual Banquet Sponsor	1	\$1,000.00	\$1,000.00
2/22/2021 - Payment: Visa *4242		(\$1,100.00)	(\$1,100.00)
Subtotal:			\$1,100.00
Tax:			\$0.00
Total:			\$1,100.00
Payment/Credit Applied:			\$1,100.00
Balance:			\$0.00

Thank you for your continued partnership

3. Member balances are always up-to-date!



- ✓ A wide number of reports are available in the software, providing abilities to review (and resend) overdue invoices, send thank you letters, collection letters, etc.

Billing Reports





- Receivables**
 - Print / Email Invoices
 - Print / Email Sales Receipts
 - Print / Email Credit Memos
 - Print / Email Statements
 - Accounts Receivable Aging Summary
 - Accounts Receivable Aging Detail
 - Member Balance Summary
 - Open Invoices
 - Collections Report
- Transactions**
 - Member Transaction Summary
 - Invoice Summary
 - Sales Receipt Summary
 - Payment Summary
 - Credit Memo Summary
 - Writeoff Summary
 - Batch Summary
 - Statement Batch Summary
- Sales**
 - Sales By Account
 - Sales By Account Representative
 - Sales By Item
 - Sales By Member
 - Payment / Receipt by Account
 - Payment / Receipt by Item
 - Payment / Receipt by Member
 - Scheduled Item Sales By Month
 - Membership Renewals
- Banking**
 - Deposit Summary
 - Check Listing
 - Payment Processing Reports / Management Tools
 - ePayment Fee Assignments
 - Sales Tax Summary
- Letters**
 - Notification Letters
 - Collection Letters
 - Thank you Letters
- Executive**
 - Journal Entry Export - Accrual Basis
 - Journal Entry Export - Cash Basis
 - Past Due Members / Mass Drop
 - Transaction Change History
 - Recognized Income by Invoice Date
 - Recognized Income by Payment Date

4. Allows for implementation of GrowthZone Pay

- ✓ Members can easily select stored credit cards to make payments for event registrations, membership dues, and more. Learn More! [5 Efficiencies Gained in Implementing GrowthZone Pay](#)

Checkout

Tony Amore \$1100.00

Online Credit Card Payment.    

Online Bank Account Payment

*Card Number: CSC:

*Expiration Date: /

Securely Save this Card

First Name: Last Name:

Company Name:

Street:

City: State: Postal Code:

Country:

Phone: Email:

[< Back](#) [Checkout >](#)

4. Allows for implementation of GrowthZone Pay

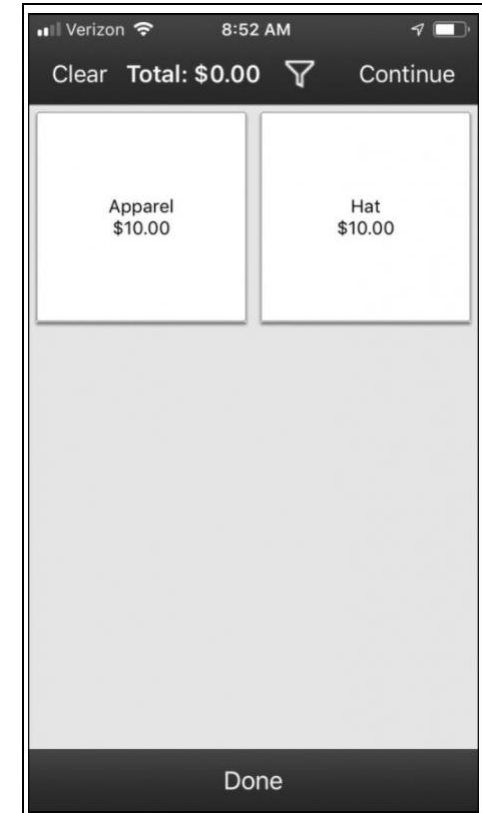
- ✓ Save time by automatically charging renewals to credit cards or bank accounts on the date a member specifies. WIKI: [Auto-charge Renewals](#)

Profile	Fee Start Date	Fee End Date	Frequency	Months Billed	Day Charged*	Amount Per Bill	Annual Amount	Scheduled In Report Month
Bobby Bob - Franks Hotdogs - Visa:*****4242-01/2027	2/1/2021		Annually	Apr	5	\$600.00	\$600.00	\$600.00
Sayali Botts - It's Amore - Visa:*****4242-01/2023	2/1/2021		Annually	Apr	5	\$450.00	\$450.00	\$450.00
				Totals:		\$1,050.00	\$1,050.00	\$1,050.00

4. Allows for implementation of GrowthZone Pay

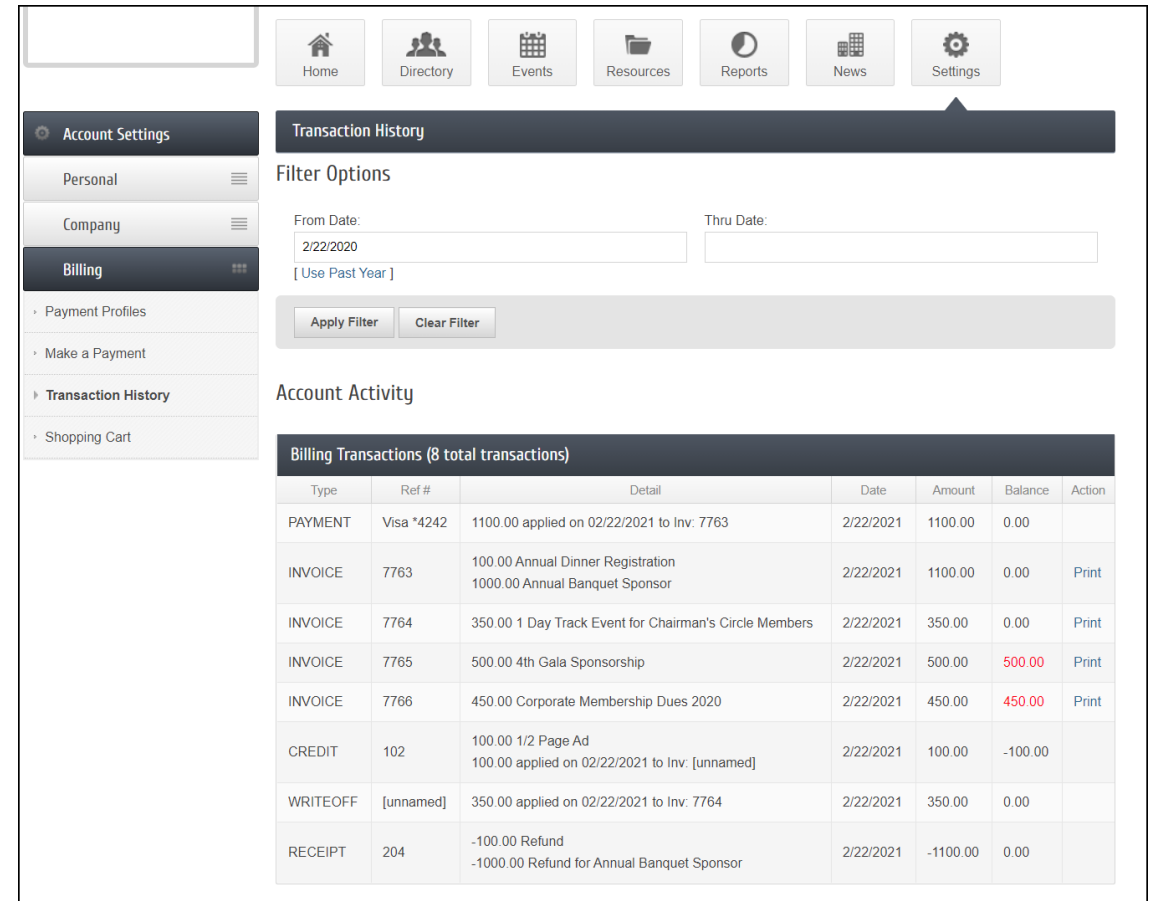
Take full advantage of the Staff App

- ✓ Accept payments for event registrations at the using the StaffApp
- ✓ Enables the Point of Sale capability for selling additional items via the app



5. Members can view & pay invoices via the MIC

- ✓ Members who use on-line pay can view all invoices and choose which ones to pay
- ✓ No guess work on the part of the member to make a payment
- ✓ Members can even print out their invoices from the MIC



The screenshot shows the 'Transaction History' page in the Chambermaster & Memberzone system. The page includes a navigation menu on the left with options like 'Account Settings', 'Personal', 'Company', 'Billing', 'Payment Profiles', 'Make a Payment', 'Transaction History', and 'Shopping Cart'. The main content area features a 'Transaction History' header, 'Filter Options' with 'From Date' (2/22/2020) and 'Thru Date' fields, and 'Apply Filter' and 'Clear Filter' buttons. Below this is the 'Account Activity' section, which displays a table of 'Billing Transactions (8 total transactions)'. The table has columns for Type, Ref #, Detail, Date, Amount, Balance, and Action.

Type	Ref #	Detail	Date	Amount	Balance	Action
PAYMENT	Visa *4242	1100.00 applied on 02/22/2021 to Inv. 7763	2/22/2021	1100.00	0.00	
INVOICE	7763	100.00 Annual Dinner Registration 1000.00 Annual Banquet Sponsor	2/22/2021	1100.00	0.00	Print
INVOICE	7764	350.00 1 Day Track Event for Chairman's Circle Members	2/22/2021	350.00	0.00	Print
INVOICE	7765	500.00 4th Gala Sponsorship	2/22/2021	500.00	500.00	Print
INVOICE	7766	450.00 Corporate Membership Dues 2020	2/22/2021	450.00	450.00	Print
CREDIT	102	100.00 1/2 Page Ad 100.00 applied on 02/22/2021 to Inv. [unnamed]	2/22/2021	100.00	-100.00	
WRITEOFF	[unnamed]	350.00 applied on 02/22/2021 to Inv. 7764	2/22/2021	350.00	0.00	
RECEIPT	204	-100.00 Refund -1000.00 Refund for Annual Banquet Sponsor	2/22/2021	-1100.00	0.00	

5. Members can view & pay invoices via the MIC

- ✓ No extra work on your part determining which payments need to be assigned to invoices
- ✓ Learn More! [How to Pay Bills Online](#)

Make a Payment

Use this screen to make direct credit card payments to your account.

You have 1 item(s) already in your cart. [Click here to purchase them.](#)

Open Invoices (2)				Selected Invoice Total
<input type="checkbox"/> Invoice #	Details	Subtotal	Balance Due	Payment Amount
<input type="checkbox"/> 7765	Bill To: Sayali Botts Date: 2/22/2021 Due: 2/22/2021 (3 Days past due) \$500.00 [No Description] (one time)	500.00	500.00	<input type="text" value="0.00"/>
<input type="checkbox"/> 7766	Bill To: Sayali Botts Date: 2/22/2021 Due: 2/22/2021 (3 Days past due) \$450.00 Corporate Membership Dues 2020 (one time)	450.00	450.00	<input type="text" value="0.00"/>

[▶ Make an additional payment](#)

Updating your QuickBooks

- ✓ ChamberMaster provides an export that will allow you to upload journal entries to your QuickBooks software to ensure both systems match
- ✓ COMING SOON: In the near future you will be able to upload a transactions export to your QuickBooks software so you can upload specific invoices, payments, etc. to your QuickBooks

Journal Entry Export 5/7/2020 03:23PM

Export Date: 5/7/2020 03:24:00 pm
Batch Name: Journal Entry Export 5/7/2020 03:23PM
Staff Person: Hunter Grayson
Export Format: IIF

Save Print Close

Exported Transactions					
Transaction	Memo	Account	Class	Debit	Credit
Deposit Ref #: [id_#76] 4/9/2020 Created: 4/9/2020 03:09:00 pm	Deposit	Deposit Account		2402.00	0.00
	[payment #2465]	Undeposited Funds		0.00	800.00
	[payment #2470]	Undeposited Funds		0.00	712.00
	Internal notes?	Undeposited Funds		0.00	800.00
	[payment 76543]	Undeposited Funds		0.00	120.00
	[receipt 195]	Undeposited Funds		0.00	30.00
	Refund for payment applied to invoice(s) #7667, #7667	Undeposited Funds		60.00	0.00
Deposit Ref #: [id_#77] 4/9/2020 Created: 4/9/2020 03:10:00 pm	Deposit	Deposit Account		275.00	0.00
	Store Order #1	Undeposited Funds		0.00	25.00
	Store Order #2	Undeposited Funds		0.00	25.00
	Store Order #3	Undeposited Funds		0.00	25.00
	Store Order #4	Undeposited Funds		0.00	200.00
	Backoffice payment - ch_0GW5pCOaikBg3VYikV2t0Q5j	Undeposited Funds		0.00	700.00
	[payment VI3456]	Undeposited Funds		0.00	900.00
	Refund for payment applied to invoice(s) #828	Undeposited Funds		900.00	0.00
Refund for payment applied to invoice(s) #148	Undeposited Funds		700.00	0.00	
Payment Ref #: VISA *4242 4/28/2020 Created: 4/28/2020 11:02:00 am	Non-Member Transactions	Undeposited Funds		200.00	0.00
	Online payment - ch_0GcvsjOaikBg3VYIajAzg76p	Default Accounts Receivable		0.00	200.00
Invoice Ref #: 7685 4/28/2020 Created: 4/28/2020 11:02:00 am	Non-Member Transactions	Default Accounts Receivable		200.00	0.00
	2020 Annual Golf Tournament: Includes golf and lunch (Cheri Petterson)	Test Current Liability		0.00	200.00

Next Steps

- ✓ In the coming weeks, our team will be reaching out to you to discuss the process for moving from CQI to Integrated Billing
- ✓ If you are ready to get started, now, reach out to support@growthzone.com to start taking advantage of Integrated Billing
- ✓ Interested in GrowthZone Pay? Reach out to our engagement team for details engagement@growthzone.com

Questions?

