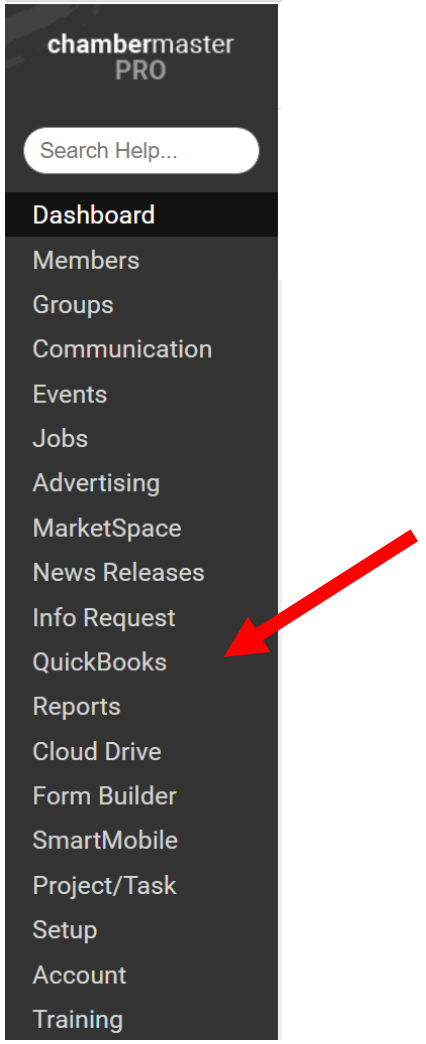
Switching from CQI? 5 Benefits of Integrated Billing!

GrowthZone
smarter association software

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

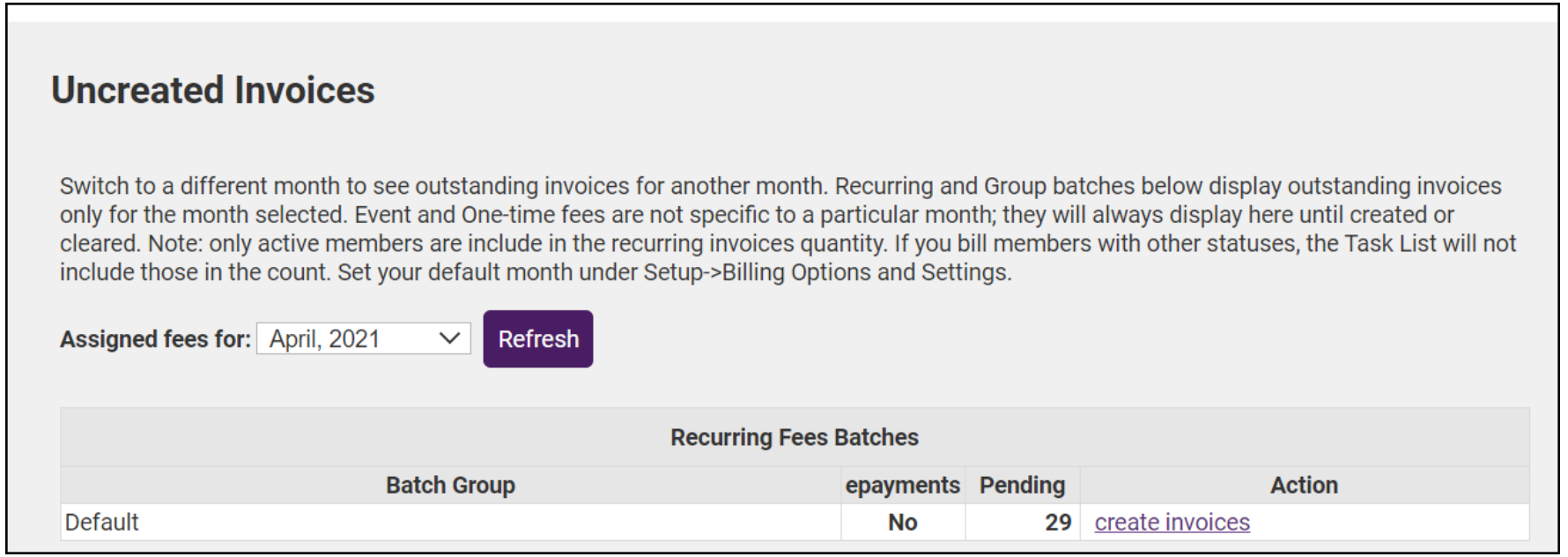
1. Dependence on CQI is no longer needed
2. Easily generate & track membership renewal invoice
3. Member balances are always up-to-date
4. Allows for implementation of GrowthZone Pay
5. Members can view & pay invoices via the MIC

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



2. Easily generate & track membership renewal invoices

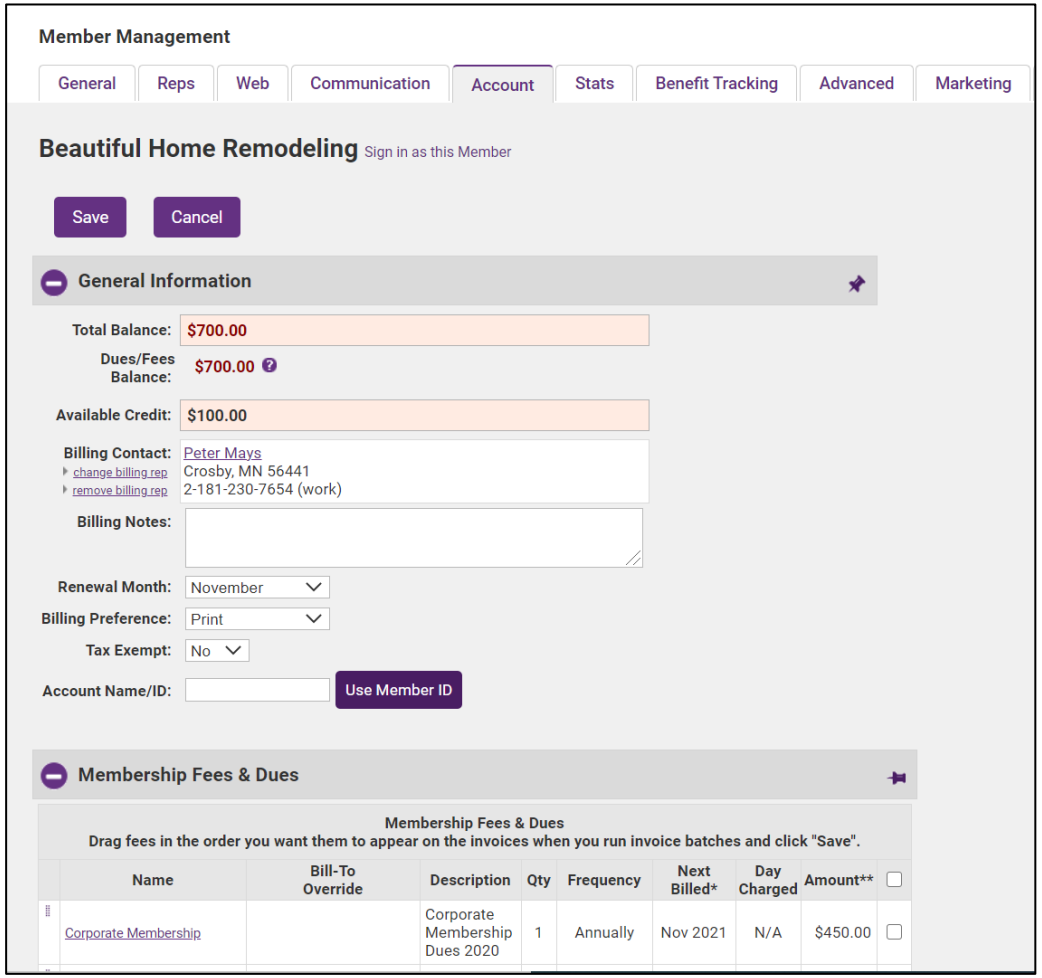
Delivery of invoices is made easy, and you will have a record of the communication right in your ChamberMaster software

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	2/2020	add follow-up		Tony Amore	Hunter Grayson
Update your Listing	5/28/020	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

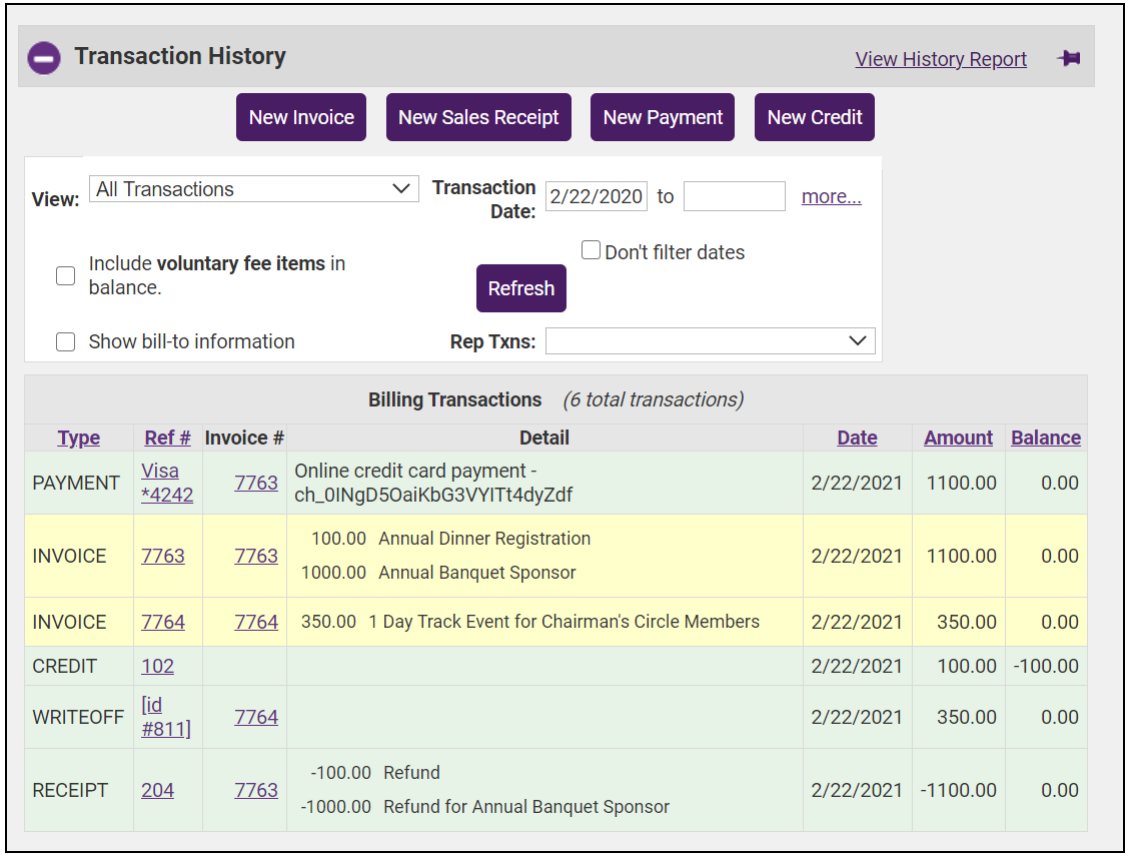
3. Member balances are always up-to-date

- ✓ 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



3. Member balances are always up-to-date

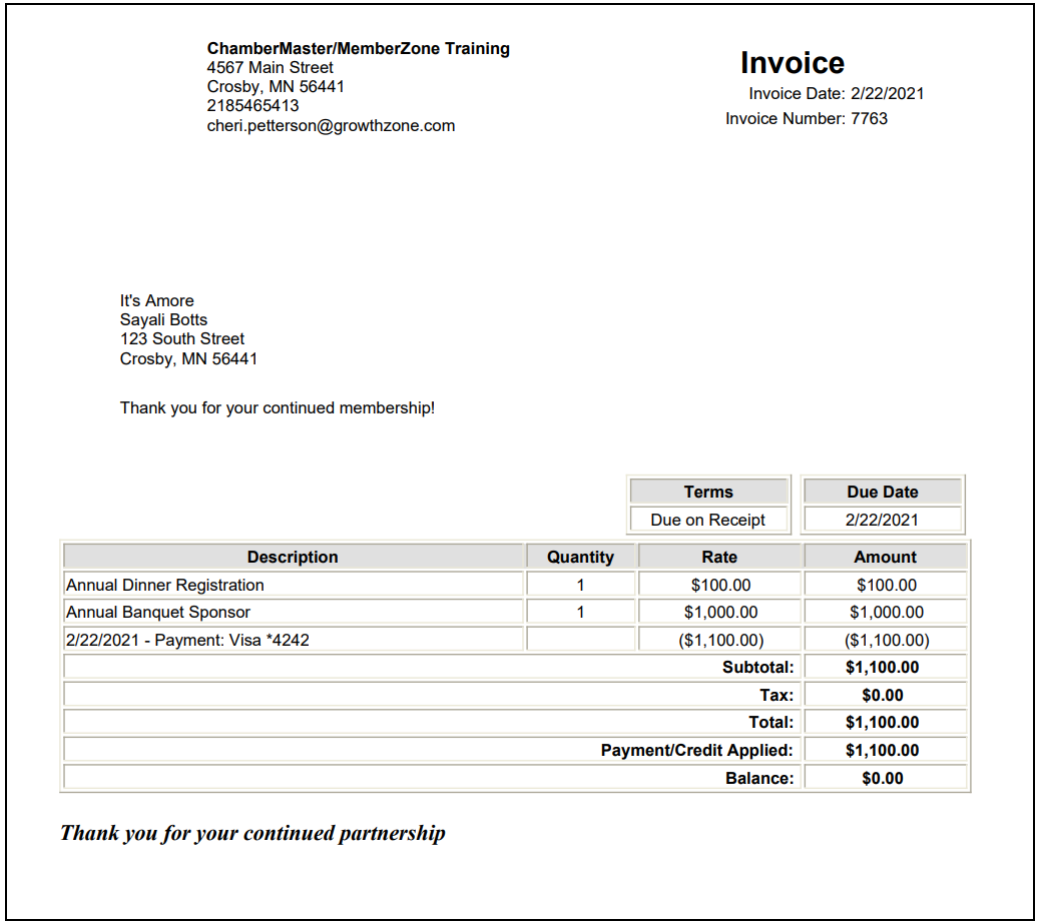
- ✓ All transactions an be performed within the ChamberMaster database and are tracked on your member's account tab. No need to switch from software to software
- ✓ WIKI: Transaction History



Type	Ref #	Invoice #	Detail	Date	Amount	Balance
PAYMENT	Visa *4242	7763	Online credit card payment - ch_0INgD5OaiKbG3VYITt4dyZdf	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!

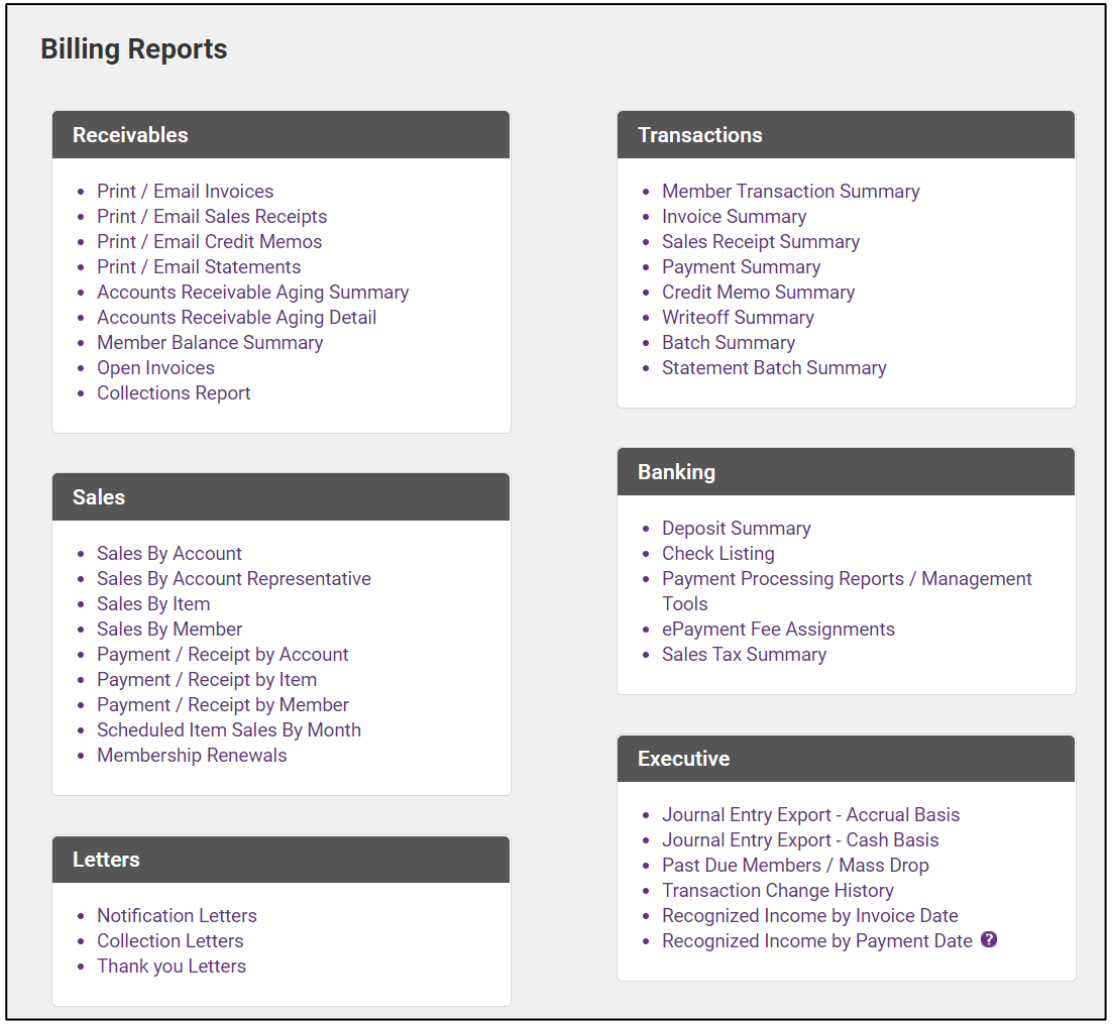
Terms	Due Date
Due on Receipt	2/22/2021

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

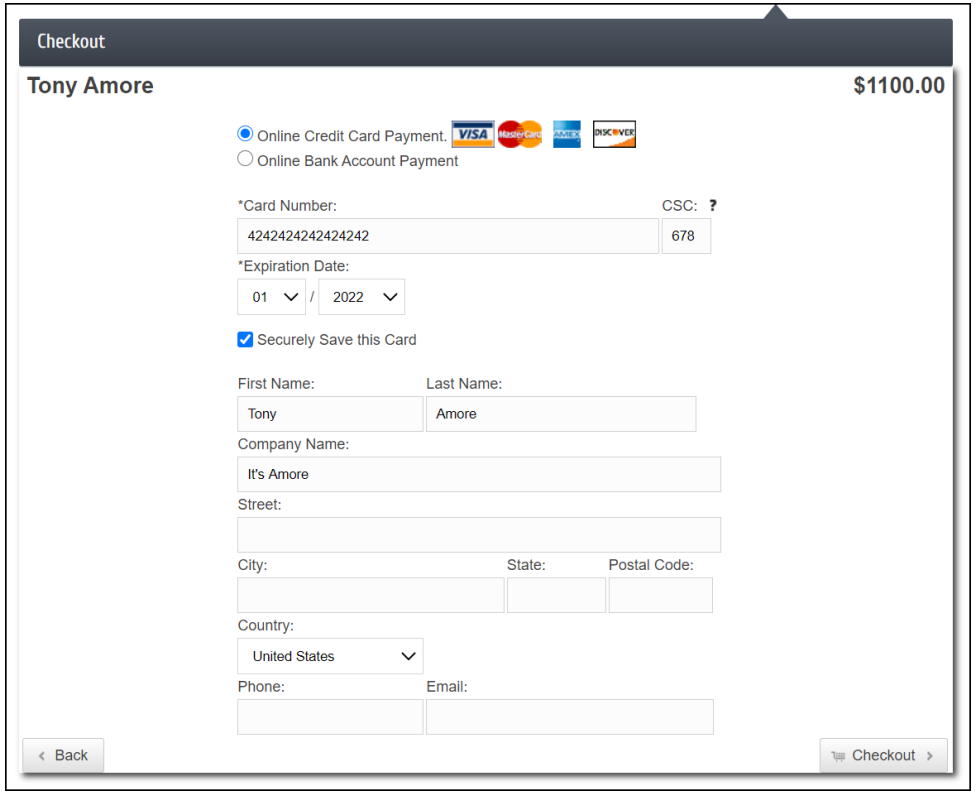
3. Member balances are always up-to-date!

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



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



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**

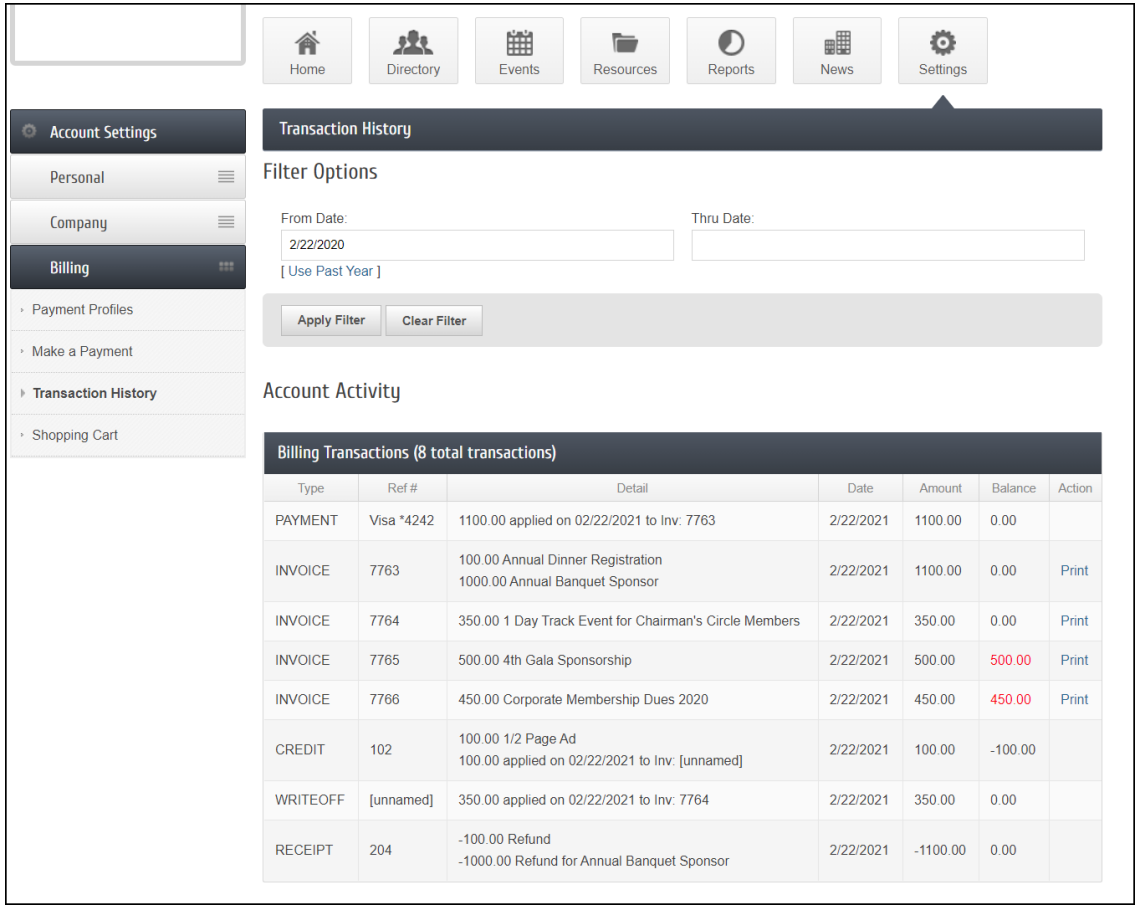
4. Allows for implementation of GrowthZone Pay

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

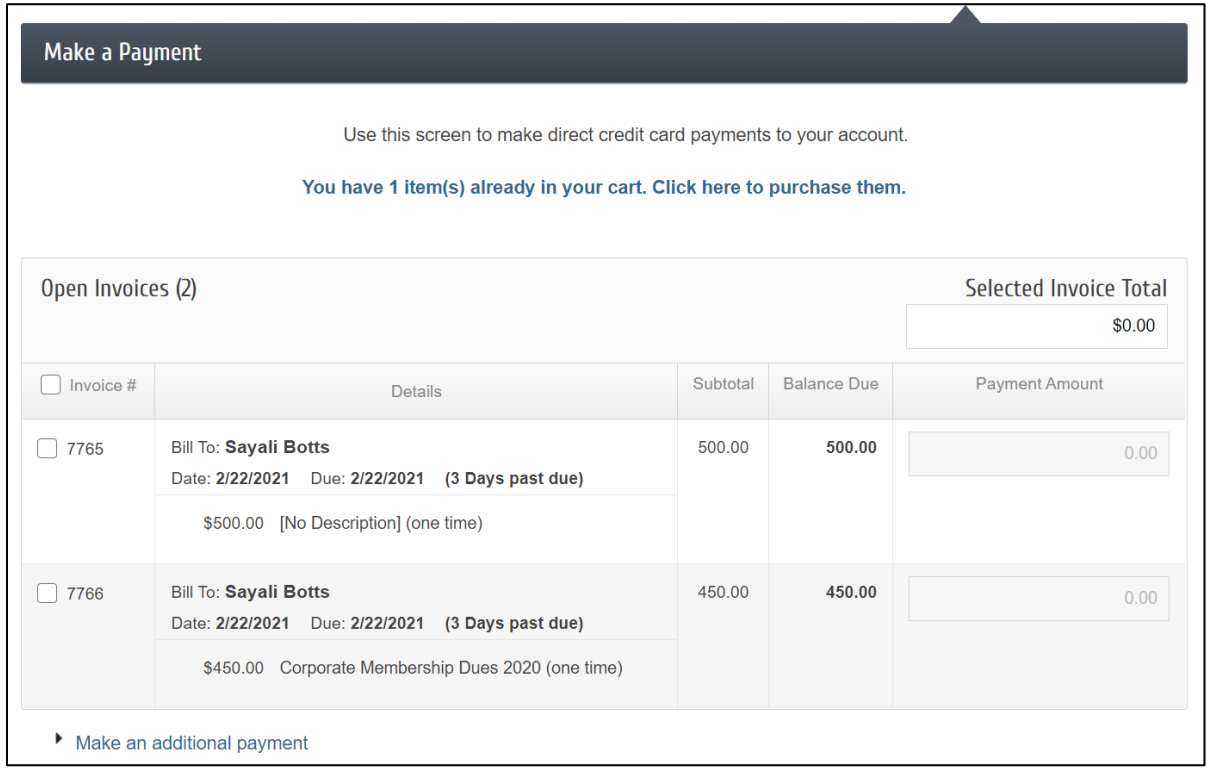
- ✓ Members who use on-line pay can view all invoices and choose which ones to pay
- ✓ No guess work on the part of the member to make a payment
- ✓ Members can even print out their invoices from the MIC



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	

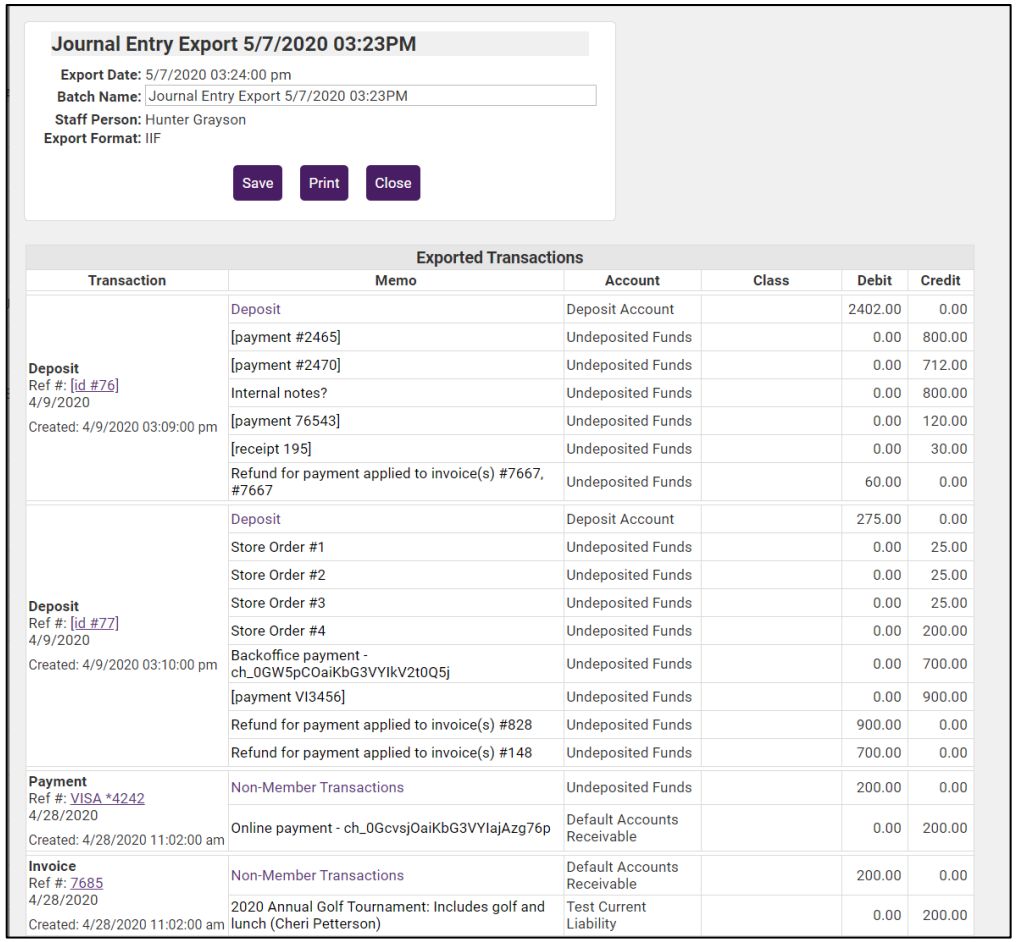
5. Members can view & pay invoices via the MIC

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



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?

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