



## ChamberMaster/MemberZone Regional Training Day Two

*Please bring your laptop to each training session to participate in hands on exercises.*

**9am – 11:30am**

### **Successful Event Management**

- Initial Event Setup Options
- Adding & Customizing Your Events
- Managing Event Attendees and Sponsors
- Billing for Events

**11:30am – 12:30pm – Lunch**

**12:30pm – 4:30pm**

### **Setting Up and Managing Your Billing (This session is NOT intended for CQI Users)**

#### Billing Options & Setting

- Review Chart of Accounts
- Review Fee Setup
- Invoice & Cover Letter Templates

#### Daily Billing Activities

- Managing Batch Invoicing
- Integrated Payment Processing
- Managing Payments, Refunds, Credits, Write-offs
- Reviewing Billing Reports & Journal Entries

