

ChamberMaster/MemberZone Hosted Regional Training Agenda

Classes run from 9:00am – 4:30pm with breaks and a one hour lunch

Day 1

Communications

- Using Email Templates
 - Best Practices to Ensure Your eMails Get Through
- Logging Notes/Reminders
- eReferrals
- Quarantined eMails
- Communications Status

*Billing- Initial Setup (*not intended for CQI users)*

- Chart of Accounts
- Fee Items

Directories

- Categories
- Quick Links
- Member Directory Listings

Membership Management

- Members Module Overview
- Custom Fields
- Membership Types
- Add Members
- Manage Members
 - Drop Member
 - Reactivate Member

Manage Reps

- Login Permissions

Member Information Center (MIC)

- Member Directory Listings
- Web Content
 - Deals, Job Postings, News Releases, etc.
- Community Feed
- Paying Bills
- Register for Events



Day 2

*Managing Integrated Billing (*not intended for CQI users)*

- Billing Precheck Report
- Renewal Notification Letters
- Create Batch of Renewal Invoices
 - Deliver Invoice Batches
 - Redeliver Invoice Batches
- Reports & Tools
 - Invoice Summary Report
 - Open Invoice Summary Report
 - Collections Report
 - Mass Drop/Write-Off Tool

Event Management

- Events Module Overview
- Event Setup
- Event Management
 - Manage the Guest List
 - Event Invitations
 - Waiting List
 - Add/Update/Cancel Registration
 - Manage Event Billing
 - Generate Event Invoices

