

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

- Event 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](#)
- KB: [Mange 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 the 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 is full
 - Guest asked if they would like to be placed on waiting list
- KB: [Event Waiting List](#)

Waiting List Party

July 28, 2023 @ 1:00 PM - 11:00 PM (EDT)

Registration for the **Waiting List Party** event is full. Would you like to add your name to the waiting list?
Yes please

Pricing Information

Event Registration	\$50.00
<i>Waiting List Party event registration.</i>	Sold Out

Edit Attendee Information

- Change/update attendee information
 - Add additional attendee information
 - Update custom fields
 - Add attendee to database as a prospect
- Edit Attendee Icon

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. ⓘ

Select Existing ▼ Create Record ▼

Primary contact: Sandra Dee

Cancel Save & Close

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](#)

Edit Registration

Registration Information

Status:

Registered

Invitation Declined

Registered

Canceled

Sponsor Only - Not Attending

Attendee Information

Choose one [Pricing Details](#) **Total**

Joanna	Parks	Golf Team of 4	400.00	 
Roxie's Rascals				
joanna@mailinator.com				
Additional	Attendee	2 of 4		 

Working with Sponsors

- Sponsors added two ways:
 - Via back office
 - Added automatically when selecting registration fee designed to automatically add as sponsor
- Create custom Sponsorship Levels for each event
 - Default sponsorship levels
- KB: Working with Sponsors

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 ⓘ		▶ Change Image ▶ Remove Image

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

Logo Placement: ⓘ

Sponsorship Level: [Edit Sponsorship Levels](#)

Logo Sort Order:

Sponsor Web Display Options

- Display sponsor logos
- Link to sponsor's website
 - Can charge fee for this service
- Can choose sort order
 - Defaults to alphabetical order
- KB: [Event Sponsor Web Display Options](#)

2024 Golf Tournament

The Kalamazoo Area Chamber will present its **24th Annual Golf Tournament**. This public event has been one of the premier chamber events that include not only members of the chamber and area residents, but also dignitaries and key community leaders from Kalamazoo and the surrounding communities. The tournament will follow a shotgun start.

Players of all skill levels are welcome to attend this fun event!
Golfers will make new business connections during this fun day on the links. This is our chambers biggest fundraising event of the year so come show your support!

Event includes a post-game steak dinner, hot dog luncheon at the turn, pre-game continental breakfast with shrimp cocktails and Bloody Mary bar, warm donuts from the donut truck, chances to WIN many fabulous prizes!

Not a golfer? No problem!
There are plenty of ways to get involved-no golf skills required!

Sponsorship Opportunities
Gain exposure for your business with one of many sponsorship opportunities priced to fit every budget—starting at \$150. Opportunities are limited and will fill up quickly.

Marketing Opportunities
Showcase your company's services to local business leaders and gain new customers by donating a raffle prize. Donors will be promoted through event signage and recognized from the podium.

Volunteer Opportunities
Get involved and make new connections by volunteering. Assignments will range from golfer registration to monitoring special contests.

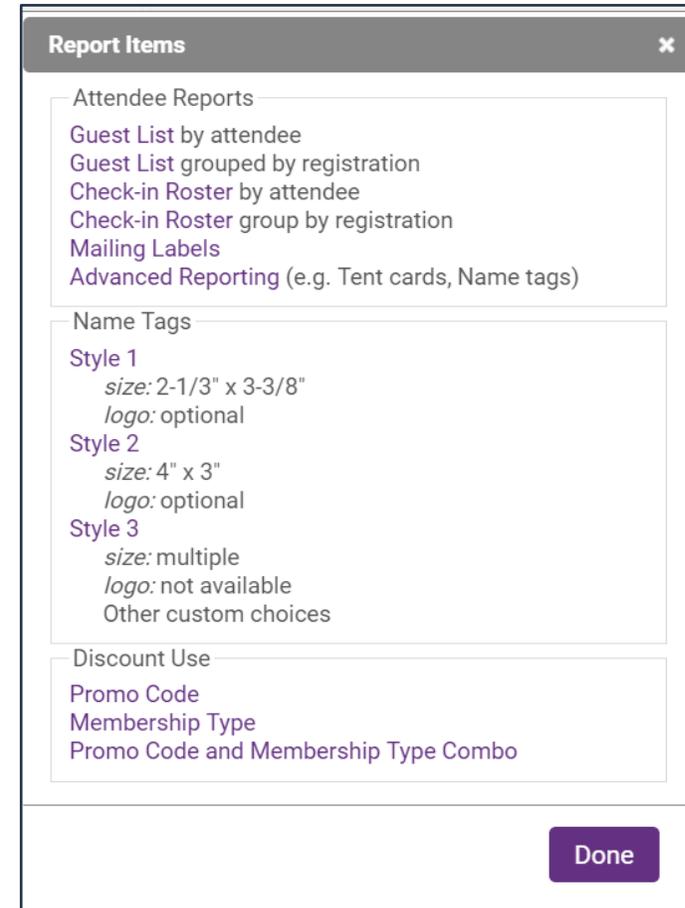
Registration opens January 30, 2024.

Event Sponsors
Putting Green Sponsor

OUTDOOR GEAR UNLIMITED

Event Reports and Labels

- Reports, labels, and downloads available at the bottom of several the lists
 - [Name Tags](#)
 - [Check-in Rosters](#)
 - [Name Plates](#)
 - Mailing Labels
- KB: [Event Additional Fee Items Report](#)



Checking In Attendees

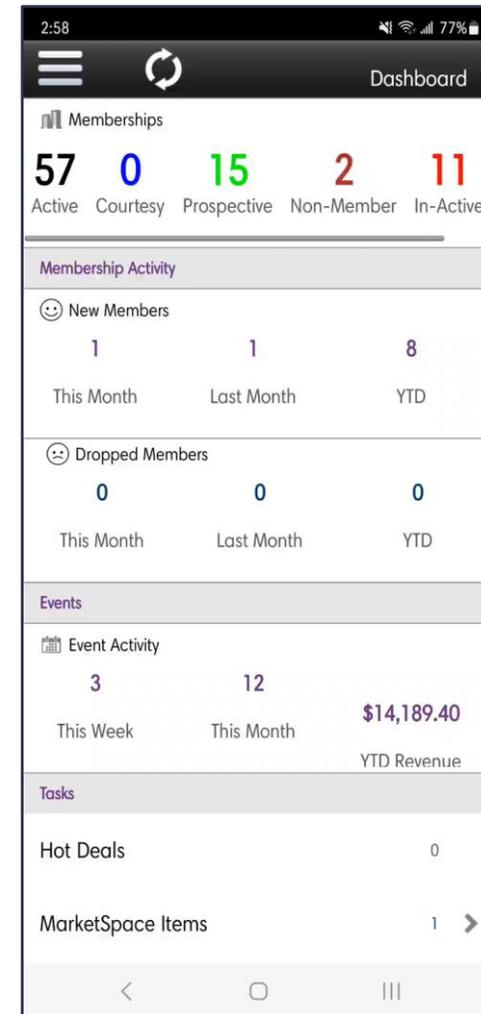
- Print [roster](#)
- Manually [check-in](#) guests
- Check guests in from Registered Attendee Info section of Guest List Summary
- Quicky and easy check-in using [StaffApp](#) and QR codes
- KB: [Mark Registrants as Attended](#)

Event Attendance 2022 Golf Tournament					
<input type="checkbox"/>	Company Name	Attendee First Name	Attendee Last Name	Primary Contact Company	Attendee Comments
<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

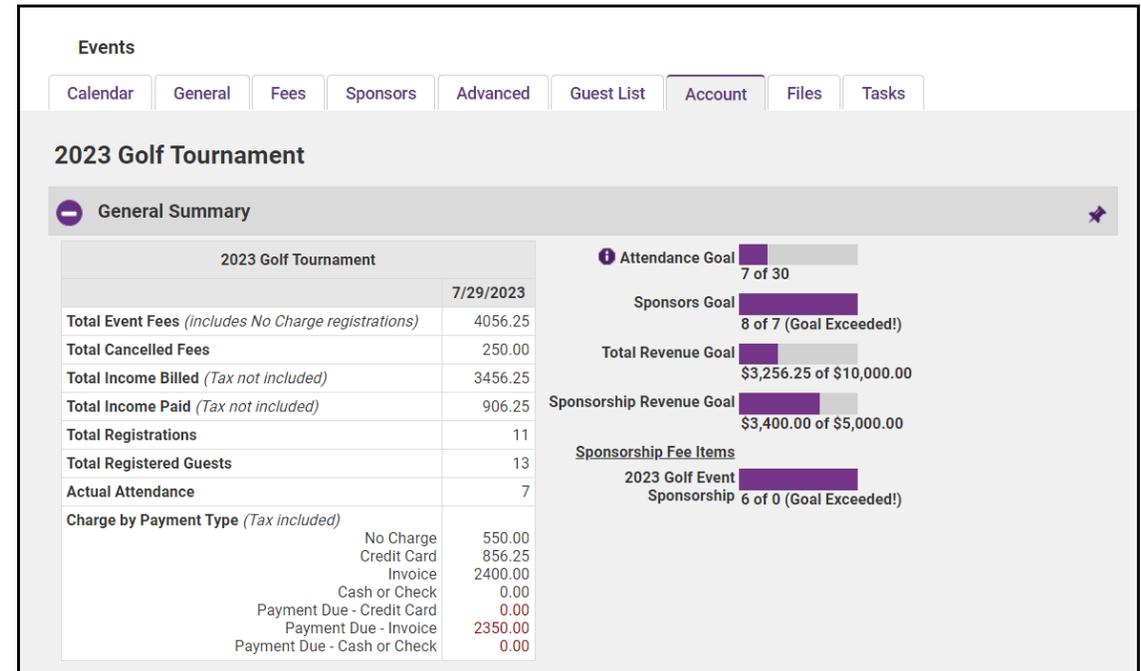
Point of Sale Module with StaffApp

- Provides full feature check-out solution
 - Mobile card reader compatible
- Sell additional items at tournament
 - Mulligans
 - Drink tickets
 - Contest/game entry
 - Raffle tickets
 - Tees
- Automatic transactions created on member's account
 - Sell items to non-members, too!



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](#)



Event Invoicing

- Easily create and deliver invoices
 - Directly from the Event Account Tab
 - Billing module
- Need to have invoicing of event registrations permission set
- KB: Create Event Invoices
- KB: Return to Event Invoice Batch

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.

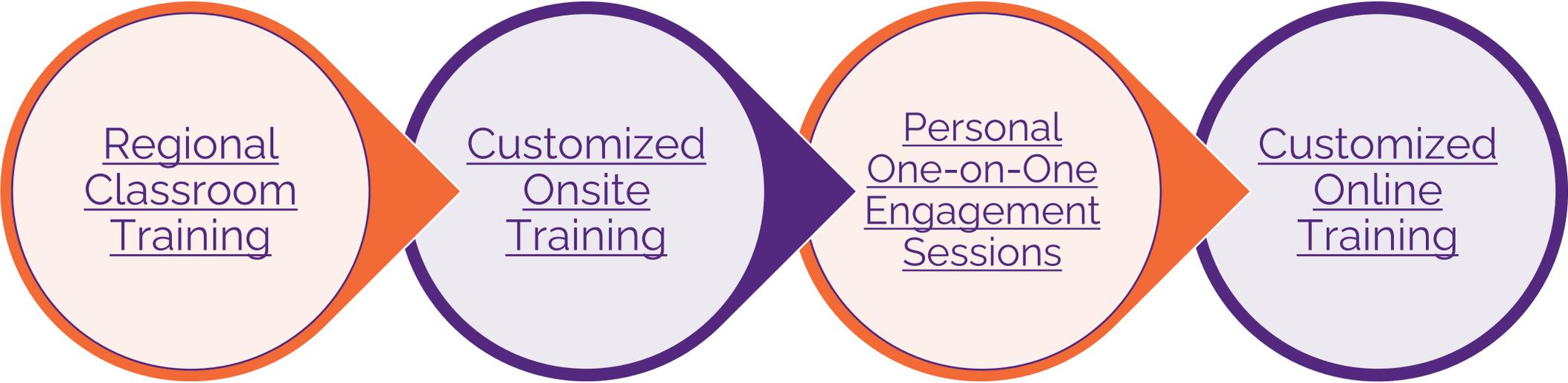
Batch Name: **Event Fees for Business Expo** Find Batch 🔔

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

Training Resources



Expanded Training Offerings



Questions?