ChamberMaster/MemberZone Classroom Training
Classes run from 9am – 4:30pm daily with a one-hour lunch

Working with Communications
Learning Objectives
• Best Practices to Ensure that your Emails Get Through
• Using Email Templates
  o Working with the Rich Text Editor
  o Sending Emails using email templates
  o Sending Mass Emails
• Logging Notes & Reminders
• Sending E-referrals

Billing – Initial Fee Setup (Not intended for CQI Users)
Learning Objectives
• Understand your Chart of Accounts
• Setting Up Single Fee Items

Managing your Contacts & Members
Learning Objectives
• Setting up Prospects in your Database
• Adding Members
• Adding Representatives
• Managing Members Recurring Fee Schedule
  o Add a Recurring Fee Schedule
  o Adjust Recurring Fee Schedule
    ▪ Upgrading Members
    ▪ Downgrading Members
  o Dropping Members
  o Merging Members
• Analyzing Membership Reports
  o Member Listing by Join Date
  o Member Listing by Drop Date
  o Custom Member Report
  o Custom Representative Report

Managing Integrated Billing (Not intended for CQI Users)
Learning Objectives
• Review Billing Options & Settings
• Manage Membership Renewals
  o Send Notifications
- Create Invoice Batches
- Deliver Invoice Batches
  - Send Immediately after Batching
  - Send from “Pending Delivery” List
- Re-deliver Invoice Batches
- Send Thank You

- Create:
  - Individual Invoices
  - Payments
  - Receipts
  - Credits
  - Refunds
  - Individual Write-offs/Write-off Mass Drop

- Generate & Analyze Billing Reports
  - Accounts Receivable Aging Report
  - Invoice Summary Report
  - Scheduled Sales By Month

- Perform Journal Entry Export
  - Journal Entry Export Best Practices

Event Management

Learning Objectives

- Adding & Customizing Your Events
  - Add Custom Fields for Event Registrations
  - Adding Registration Fee Items
  - Adding Additional Fee Items

- Managing the Guest List
  - Sending & Managing Event Invitations
  - Managing the Event Waiting List
  - Add Registrations from the Back Office
  - Update Registrations
  - Associate businesses/attendees to your Database
  - Cancel Registrations

- Manage Sponsors
  - Add Sponsors from the Back-office
  - Add Sponsor Logos from the Back-office

- Manage Event Billing
  - Create Invoices

- Create Nametags & Rosters

- Check-in Attendees
  - Send Attendee Thank You Letters