GrowthZone chambermaster memberzone

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
    - Working with the Rich Text Editor
    - Sending Emails using email templates
    - 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
    - Add a Recurring Fee Schedule
    - Adjust Recurring Fee Schedule
        - Upgrading Members
        - Downgrading Members
    - Dropping Members
    - Merging Members
- Analyzing Membership Reports
    - Member Listing by Join Date
    - Member Listing by Drop Date
    - Custom Member Report
    - Custom Representative Report

Managing Integrated Billing (Not intended for CQI Users)

Learning Objectives

- Review Billing Options & Settings
- Manage Membership Renewals
    - 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