



ChamberMaster/MemberZone Regional Training

Greater Mission Chamber of Commerce Day 2

Billing

- **Billing Setup**
 - Chart of Accounts
 - Fee Items
 - Invoice Templates
- **Daily Billing Activities**
 - Creating single invoices
 - Entering payments
 - Credits
 - Refund
 - Write Offs
- **Batch Billing**
 - Task List Settings
 - Generating Batch
- **Billing Reports**
 - Batch Summary
 - Invoice Summary Report
 - Accounts Receivable Aging Detail
 - Collections Report
- **Journal Entries/Best Practices**

Event Management

- **Understanding Event Options & Settings**
- **Setting up event fees (single fees, table/group fees, sponsor fees)**
- **Advanced event setup**
 - Discounts
 - Custom Fields
 - Add-on items
 - Setting Event Goals
- **Managing the Guest List**
 - Sending/Resending Event invites
 - Managing registrations
 - Managing registration changes
 - Managing non-member registrants
 - Creating nametags, table tents, etc.
- **Event Invoicing**





- Managing cancellations/refunds
- Managing Sponsors
 - Sponsor Fee Items
 - Adding Sponsor Logos
 - Displaying Sponsors on event page
- Event Reporting
 - Attendee List
 - Event Discount Usage Report
 - Event Participation by Company and Rep
- Using the Mobile App for Event Management

Using Form Builder

- Creating Forms
- Sharing Forms
- Analyzing Form Results

