ChamberMaster/MemberZone Regional Training

9:00am – 4:30pm with one-hour lunch

Agenda

Communications

- Email Templates
  - Best Practices to Ensure Your Emails Get Through
- eReferrals
- Quarantined Emails
- Communication Status

Billing Setup

- Chart of Accounts
- Fee Items

Directories

- QuickLinks
- Categories
- 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

Manage Membership Renewals Billing

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

Events

- 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