



# ChamberMaster/MemberZone Regional Training

Class runs from 9am – 4:30pm

## Agenda

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### Communications

- Best Practices for Ensuring you eMails get through
- Designing eMail templates
- Logging Notes/Reminders
- Sending eReferrals
- Understand and manage Quarantined eMails
- Review Communications Status

### Set Up Billing

- Setting up the Chart of Accounts
- Setting up Fee Items

### Directories

- Categories
- Quick Links

### Membership Management

- Getting Started
  - Custom Fields
  - Membership Types
- Members
  - Membership Application
  - Add Members in the Back Office
  - Manage Members
- Manage Reps





## Manage Billing

### Manage Membership Renewals

- Billing Precheck Report
- Send Notifications of Renewal
- Create Batch of Renewal Invoices
- Deliver Invoice Batches
- Redeliver Invoice Batches

### Daily Billing Activities

#### Billing Reports

- A/R Details Report
- Recurring Revenue Report
- Batch/Invoice Summary
- Past Due Members/Mass Drop

## Manage your Events

- Add and customize events
- Configure Event Registrations
- Event Communications
- Manage the Guest List
- Manage Sponsors
- Manage Event Billing
- Create Nametags & Rosters
- Check In Attendees

