

Managing ChamberMaster Events Like a Pro: Invitations, Registrations & Check-In

Agenda

- Sending Invitations
- Manage Registrations
- Manage the Guest List
- Event Reports
 - Name Tags
 - Check-in Roster
 - Custom Fields
- Event Accounting



Events Module

- Event Calendar
- Event information
- Event Fees
- Sponsors
- Guest List
- Event Account information
- Tasks
- KB: Overview of Events Module

Add Invitations for Harvest Festival 2023

Add Invitees

- › [Create a new person or company entry](#)
- › [Add individuals from a past event](#)
- › [Add sponsors from a past event](#)

Add Members

- › [Add members by membership status](#)
- › [Add members by membership type](#)
- › [Add members by directory category](#)
- › [Add members by name](#)
- › [Add members by zip/postal code](#)
- › [Add members by location](#)
- › [Add members by Join Date](#)

Add Representatives:

- › [Add representatives by type/status](#)
- › [Add representatives by mem class](#)
- › [Add representatives by group](#)
- › [Add representatives by member](#)
- › [Add representatives by name](#)
- › [Add representatives by zip/postal code](#)
- › [Add representatives by location](#)
- › [Add representatives by Join Date](#)

Invitations




Type	Company	Invitee
Add invitations using the links to the left.		

Managing Attendees






- Create Invitations
- Accept or decline invitation on member's behalf
 - Comment
- KB: Manage Invitee List
- KB: Mange Guest List

Understanding the various icons of your Guest List.





Action buttons:


-  = Edit Attendee contact info, custom fields, record association
-  = Edit Registration, status, fees and additional fees, primary contact, resend confirmation
-  = Make payment or change payment info; grey color if zero balance





Meaning of colored action buttons:

-  = Payment has been made in full.
-  = Payment has not been made in full. Click to record/make the payment.
-  = Attendee is fully associated with a record in your database.
-  = Attendee needs to be associated with a record in your database. Click to edit and associate.
-  = Attendee is associated with a member record, but not a rep record.

Ideally all attendees should be associated with a rep record to provide the best reporting. Exceptions would be if you have a non-member attendee that doesn't exist in the database and you are associating them with a generic member record (such as Non-Member Event member record)

   = if all the action buttons are greyed out, this attendee has not yet been registered; click the  sign in the Status column to initiate the registration process

 **Attendee Company**
(S) Registrant Company Name = The (S) indicates the registered attendee is also a Sponsor.

-  = email attendees
-  = run report such as Guest List, roster, name tags, labels
-  = Download guest list to .CSV format (usable in Excel)
-  = Delete selected attendees

Note: Deleting attendees from the Guest List, which will alter billing amounts and affect historical reports, is not permitted from the Guest List when:

- A receipt has been created
- An invoice has been created
- A credit card has been marked as paid
- The registration has a fee with "reserved" attendees (i.e. table of 8 that requires 8 attendees)

A better option would be to cancel the registration which can be done by editing their registration.

Waiting List

- Improve attendance at event
- Enable the Waiting List on the General tab
 - If you have reached the Limit Attendee Count To number, people wishing to register for the event notified event is full
 - Guest asked if they would like to be placed on waiting list
- KB: [Event Waiting List](#)

Waiting List Party

July 28, 2023 @ 1:00 PM - 11:00 PM (EDT)

Registration for the **Waiting List Party** event is full. Would you like to add your name to the waiting list?
Yes please

Pricing Information

Event Registration	\$50.00
<i>Waiting List Party event registration.</i>	Sold Out

Cancel

Edit Attendee Information

- Change/update attendee information
 - Add/edit additional attendee information
 - Update custom fields
 - Add attendee to database as a prospect
- Edit Attendee Icon

Edit an Attendee

* Required fields

☐ Show Mailing Address

First Name:	<input type="text" value="Sandra"/>	Last Name: *	<input type="text" value="Dee"/>
Company Name:	<input type="text"/>	Title:	<input type="text"/>

Email:

Phone:

Comments:

Record Association

This record is not associated with a member or representative. ⓘ

Primary contact:

Cancel Registration

- Edit Registration icon
- Change status to canceled
- Write-off, Refund, or Credit Registrant if needed
 - Reference number on Guest List indicates transaction created
- KB: [Cancel Registration](#)

Edit Registration

Registration Information

Status:

Registered

Invitation Declined

Registered

Canceled

Sponsor Only - Not Attending

Attendee Information

Joanna Parks Golf Team of 4 400.00

Roxie's Rascals

joanna@mailinator.com

Additional Attendee 2 of 4

[Pricing Details](#)

Total

Event Reports and Labels

- [Reports](#), labels, and downloads available at the bottom of several the lists
 - [Name Tags](#)
 - [Check-in Rosters](#)
 - [Name Plates](#)
 - Mailing Labels
- KB: [Event Additional Fee Items Report](#)

Report Items

Attendee Reports

[Guest List](#) by attendee
[Guest List](#) grouped by registration
[Check-in Roster](#) by attendee
[Check-in Roster](#) group by registration
[Mailing Labels](#)
[Advanced Reporting](#) (e.g. Tent cards, Name tags)

Name Tags

[Style 1](#)
size: 2-1/3" x 3-3/8"
logo: optional
[Style 2](#)
size: 4" x 3"
logo: optional
[Style 3](#)
size: multiple
logo: not available
Other custom choices

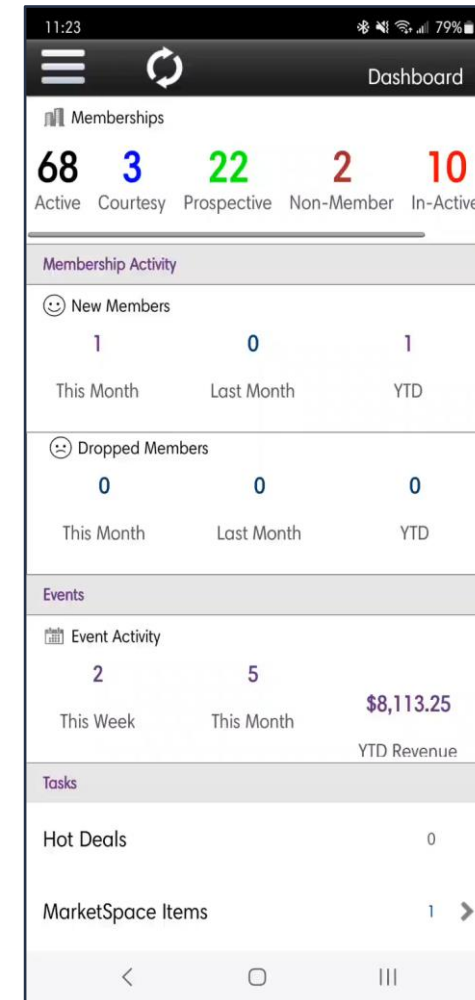
Discount Use

[Promo Code](#)
[Membership Type](#)
[Promo Code and Membership Type Combo](#)

Done

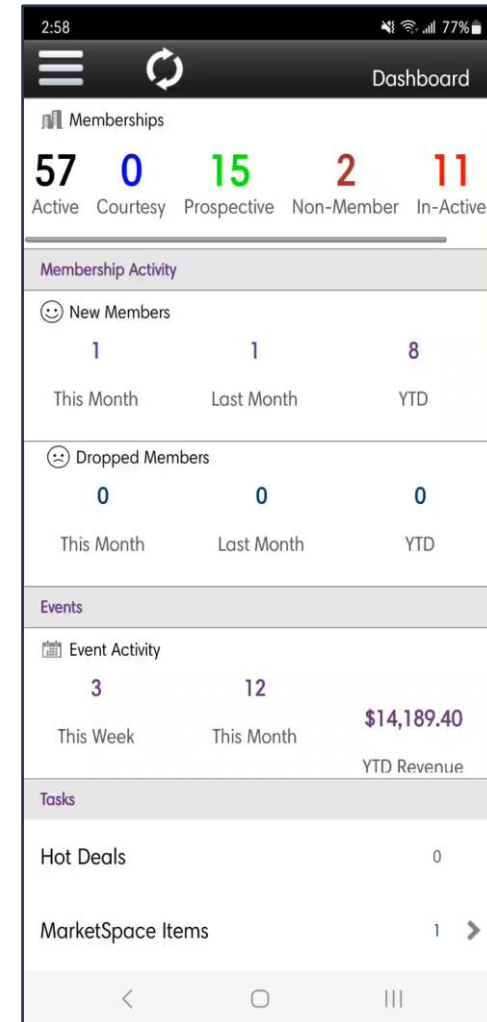
Checking-In Attendees

- Print [roster](#)
- Manually [check-in](#) guests
 - Check guests in from Registered Attendee Info section of Guest List Summary
- Quicky and easy check-in using [StaffApp](#) and QR codes
 - Confirmation email includes QR code
 - Take [payments](#) at the door
- KB: [Mark Registrants as Attended](#)



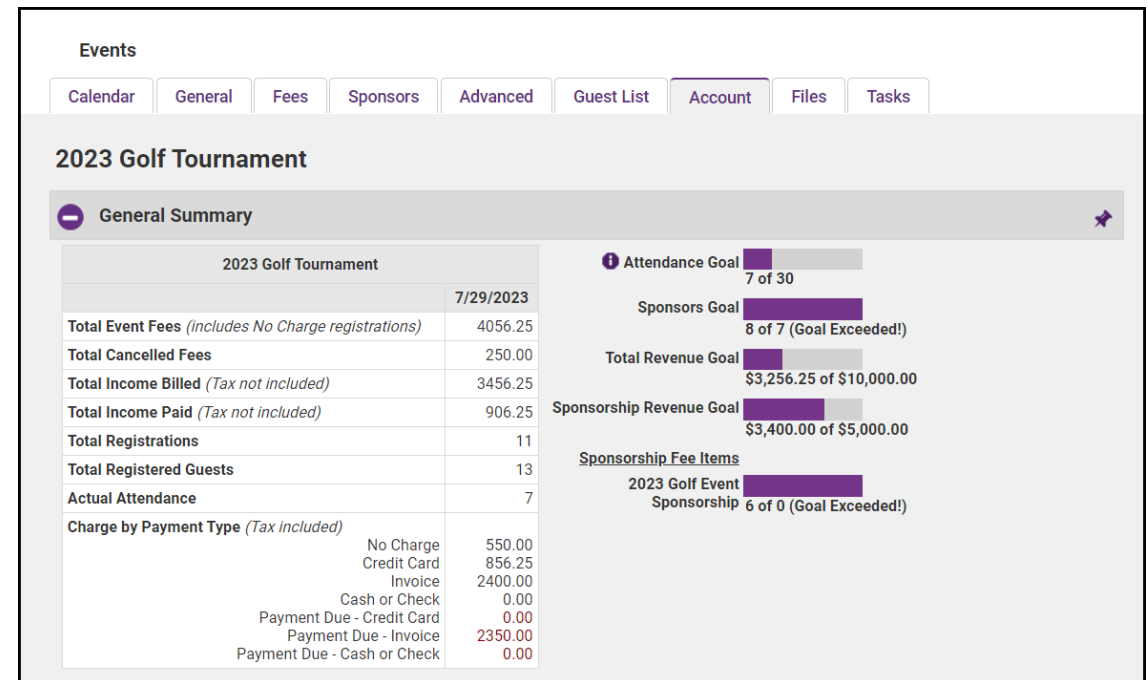
Point of Sale Module with StaffApp

- Provides full feature check-out solution
 - Mobile card reader compatible
- Sell additional items at tournament
 - Mulligans
 - Drink tickets
 - Contest/game entry
 - Raffle tickets
 - Tees
- Automatic transactions created on member's account
 - Sell items to non-members, too!



Event Account Information

- Running totals of income billed and paid
- Total registrations and total registered guests
- Actual [Attendance](#)
- [Invitations](#)
- List of sponsors for event
- KB: [View Account Information](#)



Event Invoicing

- Easily create and deliver invoices
 - Directly from the Event Account Tab
 - Billing module
- Need to have invoicing of event registrations permission set
- KB: Create Event Invoices
- KB: Return to Event Invoice Batch

Create Invoices

Batch Type: Event i

Event Name: Business Expo (Jan 28, 2023)

A/R Account: Accounts Receivable

Bill To: All event registrations marked for invoicing.

Address To: Registrant

Line Item: Event Name + Attendee Name

☒ Display uninvoiced registrations only.

Invoice Date: 12/22/2022

Invoice Number: 891 🔔

P.O. Number:

Date Due: 12/22/2022

Payment Terms: Due on receipt

Message: Download the Staff App! edit

Default Class: Use class assigned to event fees

New Batch This invoice batch has not yet been saved.

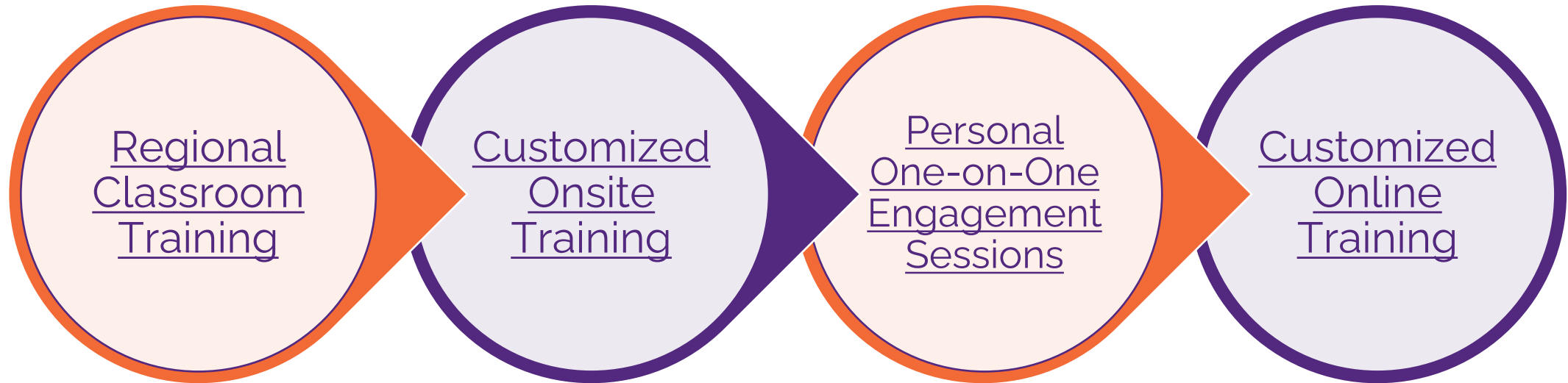
Batch Name: Event Fees for Business Expo Find Batch 🔔

Invoices in Batch						
<input type="checkbox"/>	Output	Registrant	Invoice Items	Status	Tax	Amount
<input type="checkbox"/>	None	Lifetime Eye Care	1.00 Event Registration -0.10 Event Registration	New	Non ▼	0.90
<input type="checkbox"/>	None	MicroMachines of West Michigan	1.00 Event Registration -0.10 Event Registration	New	Non ▼	0.90
<input type="checkbox"/>	None	ProStaff	1.00 Event Registration -0.10 Event Registration	New	Non ▼	0.90

Training Resources



Expanded Training Offerings



Questions?