

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

# Agenda

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- Sending Invitations
- Manage Registrations
  - Cancellations
  - Editing Attendee Info
  - Adding Items to Registration
  - Editing Custom Field Responses
- Manage the Guest List
- Event Reports
  - Name Tags
  - Check-in Roster
  - Custom Fields



# Managing Attendees

- Create Invitations for event
  - Manage guest's RSVPs
  - Resend invitations to guests
  - Manage Invitee List
- Accept or decline invitation on guest's behalf
  - Comment

**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

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**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)

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= 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

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

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= 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

- Enable Waiting List for specific events
  - Once Attendee Count limit reached, guests wishing to register are notified event is full
  - Asked if they would like to be placed on waiting list
  - Request number of tickets
- Maximize attendance at events
- Measures demand for future events
  - Real-time indicator of demand

## 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**

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

# Edit Attendee Information

- Edit attendee information
  - Change/update attendee information
  - Add/edit additional attendee information
  - Update custom fields
    - Change meal choice, time slot, table number, etc.
  - Add attendee to database as a prospect

### Edit an Attendee

\* Required fields

Show Mailing Address

First Name:  Last Name: \*

Company Name:  Title:

Email:

Phone:

Comments:

Record Association

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

Primary contact: Sandra Dee

# Cancel Registration

- Cancel guest's registration
  - Change status to canceled
  - Can cancel primary registrant only
- Follow business procedures for write-off, refund, or credit if needed
  - Reference number on Guest List indicates transaction created

Edit Registration

Registration Information

Status:

Registered

Invitation Declined





Registered

**Canceled**

Sponsor Only - Not Attending

Attendee Information

Choose one Pricing Details Total

Joanna	Parks	Golf Team of 4	400.00	 
Roxie's Rascals				
joanna@mailinator.com				
Additional	Attendee	2 of 4		 

# Event Reports and Labels

- Reports, labels, and downloads available for each event
- Prepare for event
  - Name Tags
  - Check-in Rosters
  - Name Plates
  - Mailing Labels

**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

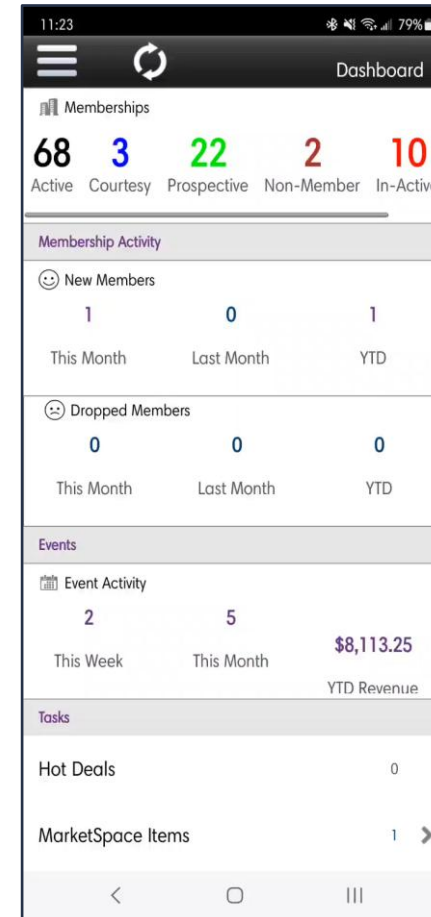
Discount Use

- Promo Code
- Membership Type
- Promo Code and Membership Type Combo

**Done**

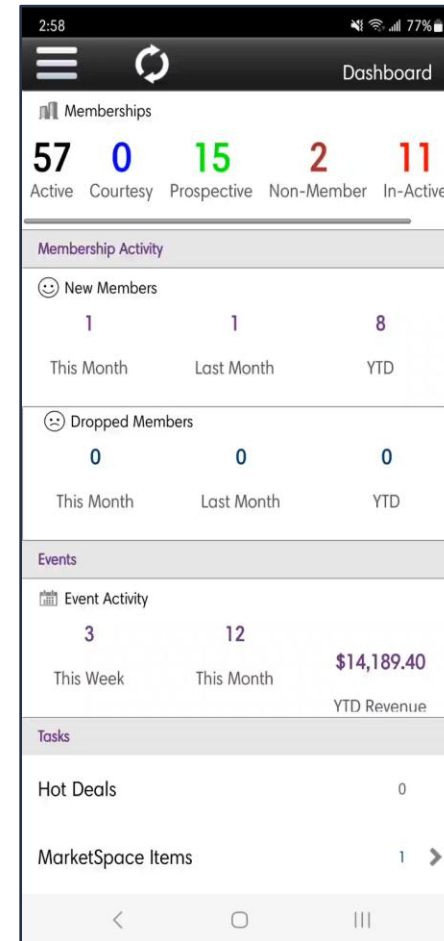
# Checking-In Attendees

- 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



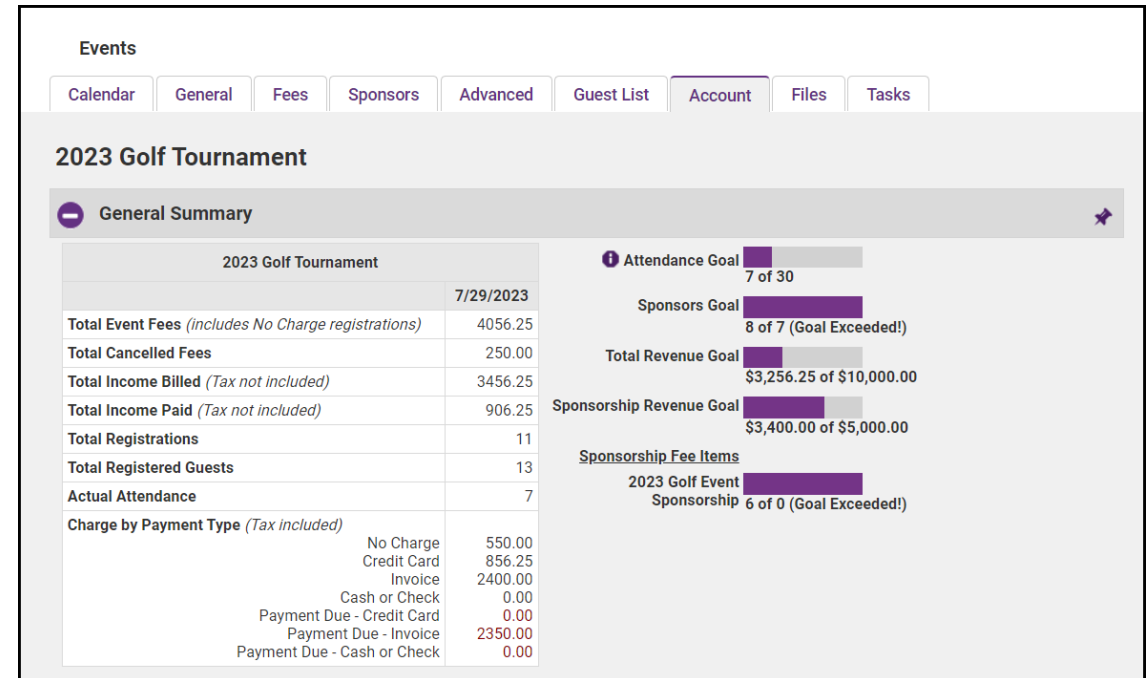
# Point of Sale Module with StaffApp

- Provides full feature check-out solution
  - Mobile card reader compatible
- Sell additional items at event
  - 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

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



# Event Invoicing

- Manage post-event financials
- Easily create and deliver invoices
  - Via print or email
  - Resend overdue event invoices via Open Invoices Report
- Return to Event Invoice Batch

### Create Invoices

Batch Type: **Event** ⓘ A/R Account: Accounts Receivable

Event Name: **Business Expo (Jan 28, 2023)**

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

# Questions?