ChamberMaster/MemberZone Introductory Classroom Training

ChamberMaster/MemberZone Solution Overview

Billing Initial Setup (Not Intended for CQI Users)
- Setup Chart of Accounts
- Setup Fee Items

Working with Members
- Add Members
- Upgrade Members
- Merge Members
- Drop Members
- Custom Member Report

Working with Representatives
- Add Representatives
- Assign Representative Login Permissions
- Overview of the MIC
- Custom Representative Report

Communications
- Email Template Overview
- Sending Individual/Mass Email
- Logging Notes
- Sending eReferrals

Billing (Not intended for CQI Users)
- Billing Center Overview
- Creating Invoices
- Creating Receipts
- Add Payments
- Batch/Deliver Invoices
- Billing Reports

Events
- Setup a Basic Event
- Manage Event Attendees
- Manage Event Sponsors
- Manage Event Billing