

Billing: Managing Items

Rate Increases, Description Updates, and Member
Assignments

Rate adjustments

- Adjust default rate
- Increase/Decrease member amounts
 - Percentage or flat amount
 - All members or by renewal month

Setup->Billing->Fee Items List

Advertising

MarketSpace

News Releases

Info Request

Billing

Reports

Cloud Drive

Form Builder

SmartMobile

eCommerce

Project/Task

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Support Help/Wiki

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in

Linked Accounts

Task List

6

Mbr Signups

5

Hot Deals

1

MarketSpace

3

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1

New Events

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Job Postings

1

Pub. Requests

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Reminders

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Mbr Payments

61

Invoices

1

Web Leads

Download Staff App

Click Here

General Options & Settings

Events Options & Settings

Member Login Area Options & Settings

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Social Network Publishing

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Billing Options & Settings

Directory Control Panel

Job Posting Settings

Backup/Data Downloads

News Releases

Trip Builder Settings

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Define Group Types

Define Membership Packages

Define Membership Types

Manage Permission Sets

Define Default Rep Preferences

Define Locations

Correspondence Categories

News Release Article Types

Member Drop Reasons

Manage Member/Rep Logins

Information Request

Consumer "Trip Purpose" Options

Travel Lead List Contact Groups

General Lead List Contact Groups

Events Calendar: View/Edit Event Types

Preview Public Information Request Pages

Install Quick-Communication Application (Windows Vista or Greater)

Consumer "Referred By" Options

Consumer "Interest" Options

Association Publications

Publication Distribution/Delivery Methods

eReferral Settings/Options

Install Quick-Communication Application (Windows XP)

Billing

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Payment Methods

Payment Terms

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Transaction Classes

Chart Of Accounts

Customer Messages

Define Sales Tax Rates

Template Manager - Cover Letters

Advanced Mass Fee Editor using Excel

- Click 'Edit Pricing' for the item that needs to be adjusted

chambermaster PRO

Find Add

Michelle's Chamber / ID:1528

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1 MarketSpace

1 News

Organization Management

Administrative Options: Edit Fee Items

list options

Item Type:

Collection Basis:

☒ Hide inactive fee items.
☒ Count only active members/approved events.

Refresh List

Print List

Add Fee Items

Reset Options

Type	Basis	Fee Item Name	Fee Amount	Description	Account	Associations	
DUES	CASH	Capital Fund Voluntary Contribution	\$0.00 Edit Pricing	Capital Fund Voluntary Contribution (voluntary)	Membership Revenue:Renewal Dues	25 Members	<input type="checkbox"/>
DUES	ACCRUAL	Membership Dues	\$0.00 Edit Pricing	Membership Dues	Deferred Income	35 Members	<input type="checkbox"/>
DUES	CASH	New Member Dues	\$0.00 Edit Pricing		Membership Revenue:Renewal Dues	0 Members	<input type="checkbox"/>
DUES	CASH	Quarterly Membersip	\$500.00 Edit Pricing		Membership Revenue:Renewal Dues	10 Members	<input type="checkbox"/>
DUES	CASH	Tax Calcualltion Test	\$0.00 Edit Pricing	Tax Calcualltion Test	Membership Revenue:Renewal Dues	0 Members	<input type="checkbox"/>
DUES	CASH	Gold Bundle	\$1000.00 Edit Pricing	Gold Membership Bundle	Bundled Fee	1 Members	<input type="checkbox"/>
DUES	CASH	Platinum Bundle	\$800.00 Edit Pricing	Platinum Bundle	Bundled Fee	3 Members	<input type="checkbox"/>
DUES	CASH	Silver Membership Package	\$1600.00 Edit Pricing	Silver Membership Package	Bundled Fee	1 Members	<input type="checkbox"/>
EVENT	CASH	Annual Dinner	\$0.00 Edit Pricing	Annual Dinner	Events:Annual Dinner	11 Events	<input type="checkbox"/>

- Update the default rate ONLY
 - ✓ Enter the new default rate in the Fee Item Price field
 - ✓ Click 'Save Changes'

NOTE: This will only affect the rate when the item is used going forward.

Edit Fee Item Definition Membership Dues

Selected Fee Item: Membership Dues

38 members are currently associated with this fee item. [view detailed member list](#)

Fee Item Pricing

Fee Item Price: 0.00

[Update all associated members to \\$0.00](#)

[Change All Rates](#)

Fee Item Pricing: Variation Breakdown		
Price	Assignments	Action
100.00	1 members are currently associated with this fee at a price of \$100.00 annually.	Update Members
250.00	3 members are currently associated with this fee at a price of \$250.00 annually.	Update Members
350.00	8 members are currently associated with this fee at a price of \$350.00 annually.	Update Members
385.00	16 members are currently associated with this fee at a price of \$385.00 annually.	Update Members
500.00	4 members are currently associated with this fee at a price of \$500.00 annually.	Update Members
600.00	1 members are currently associated with this fee at a price of \$600.00 annually.	Update Members
750.00	3 members are currently associated with this fee at a price of \$750.00 annually.	Update Members
1000.00	1 members are currently associated with this fee at a price of \$1000.00 annually.	Update Members
1200.00	1 members are currently associated with this fee at a price of \$1200.00 annually.	Update Members

[Save Changes](#)

+ Descriptions

+ Billing Frequency

[Close Window](#)

- Update the default rate and all associated member rates
 - ✓ Enter the new default rate in the Fee Item Price field
 - ✓ Click 'Update all associated members to \$X.XX'
 - ✓ Click 'Save Changes'
 - ✓ Click 'Close Window'

NOTE: This will change the default amount and ALL current member rates. If there are different levels (as shown here), this will change everything. DO NOT USE THIS OPTION IF MEMBERS ARE SET TO ANYTHING OTHER THAN AN ANNUAL FREQUENCY BILLING.

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[Save Changes](#)

+ Descriptions

+ Billing Frequency

[Close Window](#)

- Update rates by level
 - ✓ Enter the new amount in the Price column
 - ✓ Click 'Update Members' under the Action column
 - ✓ Click 'Save Changes'

NOTE: The default rate is typically a \$0.00 rate in this instance. Rate is entered at the time the item is assigned or used. DO NOT USE THIS OPTION IF MEMBERS ARE SET TO ANYTHING OTHER THAN AN ANNUAL FREQUENCY BILLING.

Edit Fee Item Definition Membership Dues

Selected Fee Item: Membership Dues

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Fee Item Pricing

Fee Item Price: 0.00

[Update all associated members to \\$0.00](#)

[Change All Rates](#)

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1200.00	1 members are currently associated with this fee at a price of \$1200.00 annually.	Update Members

[Save Changes](#)

+ Descriptions

+ Billing Frequency

[Close Window](#)

- Update rates by percentage or flat amount

✓ Click 'Change All Rates'

NOTE: This option is recommended when billing frequencies other than ANNUAL are used (monthly, quarterly, semi-annual).

Edit Fee Item Definition Membership Dues

Selected Fee Item: Membership Dues

38 members are currently associated with this fee item. [view detailed member list](#)

Fee Item Pricing

Fee Item Price: 0.00

[Update all associated members to \\$0.00](#)

[Change All Rates](#)

Fee Item Pricing: Variation Breakdown		
Price	Assignments	Action
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[Save Changes](#)

+ Descriptions

+ Billing Frequency

[Close Window](#)

- Select to adjust rates by either a percentage or flat amount
- If members have billing frequencies other than Annual, choose the renewal month of the billing batch that will be completed next. If all members are set to an Annual frequency select 'All Months' from the drop-down.
- Click 'Save & Exit'

NOTE: Any members that have billing frequencies other than Annual will need to have their rates adjusted separately.

Adjust Rates Membership Dues

Using this screen the current billing rate for the **Membership Dues** item will be updated using the following adjustment:

☒ **Percentage:** Update all rates by
 Round values to nearest \$

☐ **Flat Amount:** Update all rates by \$

Fee Renewal Month:

If "All Months" is chosen all fees assigned to members will be adjusted regardless of frequency, including one-time fees.

If a specific month is chosen annual fees with a renewal month falling on the selected month will be adjusted. Fee's with other frequencies will not be adjusted (e.g. Monthly, Quarterly, Semi-Annually).

Save & Exit

Cancel

Description Updates

- Adjust default description
- Update description for fees already assigned to a member

Setup->Billing->Fee Items List

<ul style="list-style-type: none"> Advertising MarketSpace News Releases Info Request Billing Reports Cloud Drive Form Builder SmartMobile eCommerce Project/Task Setup Account Training Support Help/Wiki Linked Accounts <hr/> Task List 6 Mbr Signups 5 Hot Deals 1 MarketSpace 3 News Releases <ul style="list-style-type: none"> 1 New Events 1 Job Postings 1 Pub. Requests 6 Reminders 8 Mbr Payments 61 Invoices 1 Web Leads 	<ul style="list-style-type: none"> ▸ General Options & Settings ▸ Events Options & Settings ▸ Member Login Area Options & Settings ▸ Hot Deal Settings ▸ Social Network Publishing ▸ MarketSpace Settings ▸ System Event Log
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Member Options	
<ul style="list-style-type: none"> ▸ Define Directory Categories ▸ Define Group Types ▸ Define Membership Packages ▸ Define Membership Types ▸ Manage Permission Sets ▸ Define Default Rep Preferences 	<ul style="list-style-type: none"> ▸ Define Locations ▸ Correspondence Categories ▸ News Release Article Types ▸ Member Drop Reasons ▸ Manage Member/Rep Logins

Information Request	
<ul style="list-style-type: none"> ▸ Consumer "Trip Purpose" Options ▸ Travel Lead List Contact Groups ▸ General Lead List Contact Groups ▸ Events Calendar: View/Edit Event Types ▸ Preview Public Information Request Pages ▸ Install Quick-Communication Application (Windows Vista or Greater) 	<ul style="list-style-type: none"> ▸ Consumer "Referred By" Options ▸ Consumer "Interest" Options ▸ Association Publications ▸ Publication Distribution/Delivery Methods ▸ eReferral Settings/Options ▸ Install Quick-Communication Application (Windows XP)

Billing	
<ul style="list-style-type: none"> ▸ Fee Items List ▸ Payment Methods ▸ Payment Terms ▸ Template Manager ▸ Transaction Classes 	<ul style="list-style-type: none"> ▸ Chart Of Accounts ▸ Customer Messages ▸ Define Sales Tax Rates ▸ Template Manager - Cover Letters ▸ Advanced Mass Fee Editor using Excel

- Click 'Edit Pricing' for the item that needs to be updated.

chambermaster PRO

Find + Add

Michelle's Chamber / ID:1528

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Organization Management

Administrative Options: Edit Fee Items

list options

Item Type:

Collection Basis:

☒ Hide inactive fee items.
 ☒ Count only active members/approved events.

Refresh List

Print List

Add Fee Items

Reset Options

Type	Basis	Fee Item Name	Fee Amount	Description	Account	Associations	
DUES	CASH	Capital Fund Voluntary Contribution	\$0.00 Edit Pricing	Capital Fund Voluntary Contribution (voluntary)	Membership Revenue:Renewal Dues	25 Members	<input type="checkbox"/>
DUES	ACCRUAL	Membership Dues	\$0.00 Edit Pricing	Membership Dues	Deferred Income	35 Members	<input type="checkbox"/>
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DUES	CASH	Silver Membership Package	\$1600.00 Edit Pricing	Silver Membership Package	Bundled Fee	1 Members	<input type="checkbox"/>
EVENT	CASH	Annual Dinner	\$0.00 Edit Pricing	Annual Dinner	Events:Annual Dinner	11 Events	<input type="checkbox"/>

- Update the default description ONLY

- ✓ Enter the new default description in the Fee Item Description field
- ✓ Click 'Save Changes'

NOTE: This will only affect the description when the item is used going forward.

Edit Fee Item Definition Membership Dues

Selected Fee Item: Membership Dues

38 members are currently associated with this fee item. [view detailed member list](#)

+ Fee Item Pricing

- Descriptions

Fee Item Description: Membership Dues

[Update all to have this Description](#)

Fee Item Descriptions: Variation Breakdown		
Description	Assignments	Action
2017 Membership Renewal	25 members have this description.	Update Members
Membership Dues	13 members have this description.	Update Members

Save Changes

+ Billing Frequency

Close Window

- Update the default description and all associated member descriptions
 - ✓ Enter the new default description in the Fee Item Description field
 - ✓ Click 'Update all to have this Description'
 - ✓ Click 'Save Changes'
 - ✓ Click 'Close Window'

NOTE: This will change the default description and ALL current member descriptions. If there are different breakdowns (as shown here), this will change everything.

Edit Fee Item Definition Membership Dues

Selected Fee Item: Membership Dues
 38 members are currently associated with this fee item. [view detailed member list](#)

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Fee Item Description: Membership Dues [Update all to have this Description](#)

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Description	Assignments	Action
2017 Membership Renewal	25 members have this description.	Update Members
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[Save Changes](#)

+ Billing Frequency

[Close Window](#)

- Update descriptions by breakdown
 - ✓ Enter the new description in the Description column
 - ✓ Click 'Update Members' under the Action column
 - ✓ Click 'Save Changes'
 - ✓ Click 'Close Window'

NOTE: The default description is typically setup for the majority of use cases in this instance. Description can be altered at the time of assigning to a member.

Edit Fee Item Definition Membership Dues

Selected Fee Item: Membership Dues

38 members are currently associated with this fee item. [view detailed member list](#)

+ Fee Item Pricing

- Descriptions

Fee Item Description: Membership Dues

[Update all to have this Description](#)

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[Save Changes](#)

+ Billing Frequency

[Close Window](#)

Assign Items to Members for Recurring Billing

- Assign through Members module
 - ✓ One member at a time
- Assign through Fee Items List
 - ✓ Add to multiple members at once

Assign to individual member

- Members->Account->Membership Fees & Dues
 - ✓ Assign Fee Items
- Select Fee Item Type from drop-down
- Customize any of the fields as needed
- Save & Exit

chambermaster PRO Members 126 of 210 filter options Find Add Michelle's Chamber / ID:1528

Search Help... Dashboard Members Groups Communication Events Jobs Advertising MarketSpace News Releases Info Request Billing Reports Cloud Drive Form Builder SmartMobile eCommerce Project/Task Setup Account Training Support Help/Wiki

Member Management

General Reps Web Communication Account Stats Advanced Marketing Files Tasks

Michelle's Little Pet Shop Login as this Member

Save Cancel

+ General Information

- Membership Fees & Dues

Membership Fees & Dues
Drag fees in the order you want them to appear on the invoices when you run invoice batches and click "Save".

Name	Bill-To Override	Description	Qty	Frequency	Next Billed*	Amount**	
There are no fee items associated with this member.							

Assign Fee Items Remove Selected Items

*Next Billed is a reminder of the month the fee is due. It does not indicate whether the fee has been billed.
**The annual amount due is listed in the Amount column.

+ Transaction History

Save Cancel

Assign a Member Fee Item Michelle's Pet Shop

Fee Item Type: Membership Dues (Membership Dues)

Description: Membership Dues

Fee Amount: 0.00 (annually or one-time)

Quantity: 1

Billing Cycle: Annually every January

Status: Active

If the invoice for this fee item needs to go to a particular contact please designate them here, otherwise invoices created for this fee will be sent to the default billing contact.

Bill To: Default - Michelle Diamon

☐ Charge to ACH, debit or credit card.

Save & Exit Close Window

- Setup->Billing->Fee Items List
- Click the Members link under the Associations column

- Advertising
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- News Releases
- Info Request
- Billing
- Reports
- Cloud Drive
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- SmartMobile
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- General Options & Settings
- Events Options & Settings
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- Social Network Publishing
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- Billing Options & Settings
- Directory Control Panel
- Job Posting Settings
- Backup/Data Downloads
- News Releases
- Trip Builder Settings

Find

Add

Michelle's Chamber / ID:1528

Organization Management

Administrative Options: Edit Fee Items

list options

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Collection Basis:

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Refresh List

Print List

Add Fee Items

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- Click Assign Members
- Select Member
- Click double arrows to move selection to Selected Members
- Once all members are selected click Continue.

Fee Item Member Associations New Member Dues

☒ Show only active members.

Member Name	Annual Fee	Quantity	Billing Frequency	Fee Item Description	
No members found that were associated with this Fee Item.					
Assign Members					
<input type="button" value="Save Changes"/> <input type="button" value="Close Window"/>					

Select Members

Member Name:

☒ Show active and courtesy members only.

Choose Members: [refresh](#)

- Hip Pocket (courtesy)
- Jake's Taxidermy
- Jason's Plumbing
- Magic Grooming & Pet Resort
- Magnificent Mutts
- Miami Shores Community Church
- Miami Theater Center (The PlayGround Theatre)
- Michelle's BBQ**
- Michelle's Company
- Michelle's Little Pet Shop

Selected Members:

- A Plus Painting
- AT&T
- Michelle's BBQ**

- Customize any rates, quantities, billing frequencies, and descriptions
- When finished click Save Changes
- Close Window

Fee Item Member Associations New Member Dues

☒ Show only active members.

Member Name	Annual Fee	Quantity	Billing Frequency	Fee Item Description	<input type="checkbox"/>
A Plus Painting	300	1	Annually ▼	Membership Dues 2018	<input type="checkbox"/>
AT&T	300	1	Semi-Annually ▼	Membership Dues 2018 - Semi-Annual Billing	<input type="checkbox"/>
Michelle's BBQ	1000	1	Monthly ▼	2018 Membership Dues - Monthly billing	<input type="checkbox"/>

► Assign Item to Additional Members

► Print List

► Download List

► Remove Selected Items

Save Changes

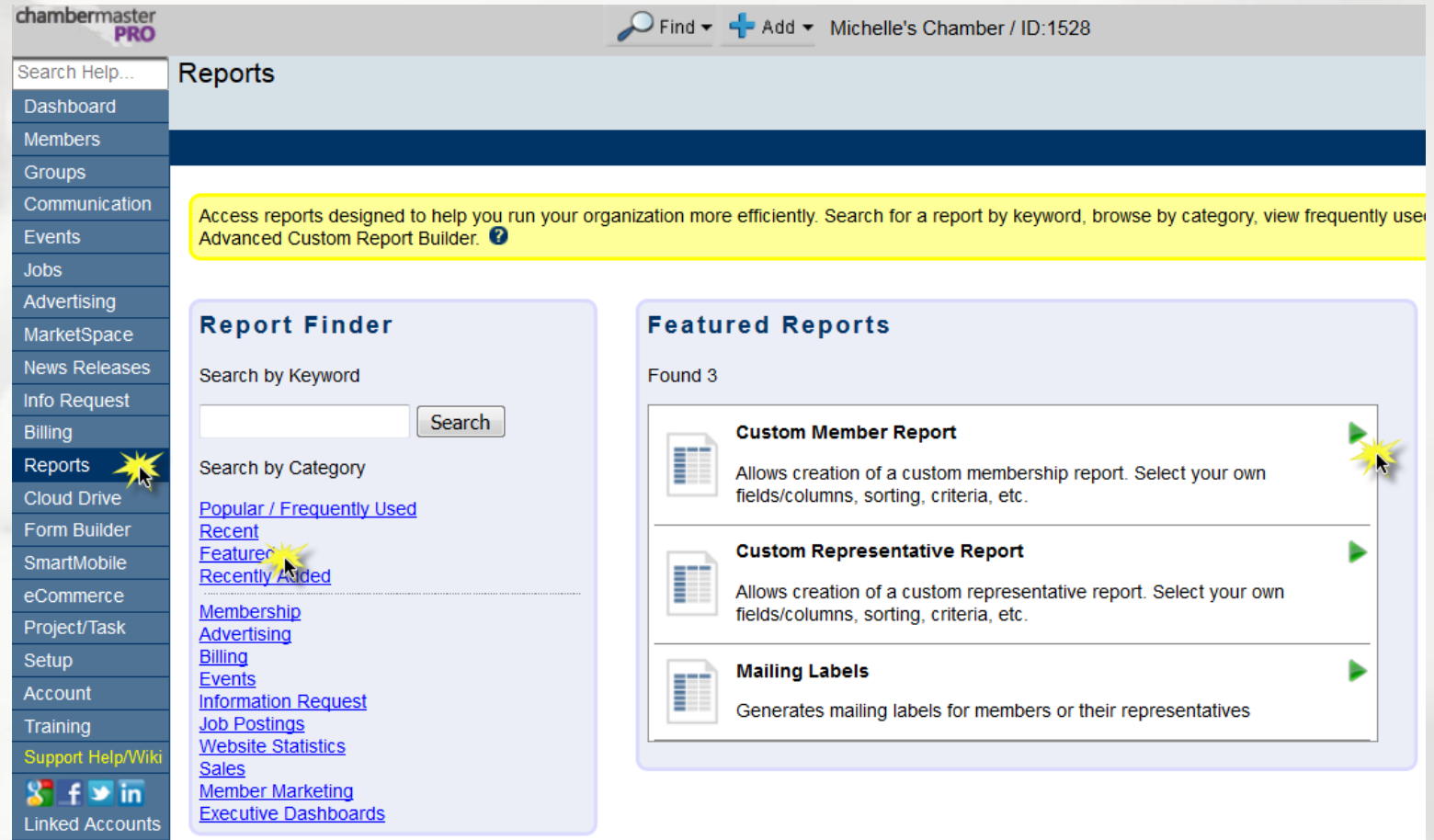
Close Window

Verify that all Members are set up to be billed

- Do all Members have a renewal month?
- Do all Members have a fee assigned?

Run Custom Member report to confirm renewal months and fee assignments

- Reports->Featured->Custom Member Report



The screenshot shows the 'chambermaster PRO' interface. At the top, there's a navigation bar with 'Find', 'Add', and 'Michelle's Chamber / ID:1528'. Below this is a 'Reports' section with a yellow banner stating: 'Access reports designed to help you run your organization more efficiently. Search for a report by keyword, browse by category, view frequently used Advanced Custom Report Builder.' On the left is a sidebar menu with options like Dashboard, Members, Groups, Communication, Events, Jobs, Advertising, MarketSpace, News Releases, Info Request, Billing, Reports (highlighted with a yellow star), Cloud Drive, Form Builder, SmartMobile, eCommerce, Project/Task, Setup, Account, Training, Support Help/Wiki, and Linked Accounts. The main content area is divided into two panels. The 'Report Finder' panel on the left has a 'Search by Keyword' field and a 'Search' button, followed by a 'Search by Category' section with links for 'Popular / Frequently Used', 'Recent', 'Featured' (highlighted with a yellow star), and 'Recently Added'. Below these are links for 'Membership', 'Advertising', 'Billing', 'Events', 'Information Request', 'Job Postings', 'Website Statistics', 'Sales', 'Member Marketing', and 'Executive Dashboards'. The 'Featured Reports' panel on the right shows 'Found 3' reports: 'Custom Member Report' (allows creation of a custom membership report), 'Custom Representative Report' (allows creation of a custom representative report), and 'Mailing Labels' (generates mailing labels for members or their representatives). Each report entry has a green arrow icon on the right, with the 'Custom Member Report' arrow highlighted by a yellow star.

- Under Contact Information select 'Company Name'
- Under Billing Information select 'Renewal Month' and 'Recurring Fees and Dues List'
- Primary Sort = Renewal Month
- Secondary Sort = Recurring Fees and Dues List
- Click 'Continue'

chambermaster PRO

Find Add Michelle's Chamber / ID:1528

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Member Listing

Saved Reports (optional)

Load A Saved Report: - Choose One -

Fields Reported

Available Fields:

▶ Contact Information

☒ Company Name

☐ File-By Name

☐ Primary Phone

☐ Alternate Phone

☐ Toll-Free Phone

☐ Cell Phone

☐ Fax

☐ Email

☐ Website

☐ Physical Address 1

☐ Physical Address 2

☐ Physical City

☐ Physical State

☐ Physical Zip

☐ Physical Country

☐ Full Physical Address

☐ Mailing Address 1

☐ Mailing Address 2

☐ Mailing City

☐ Mailing State

☐ Mailing Zip

☐ Mailing Country

☐ Full Mailing Address

▶ Member Information

▶ Web-Page Information

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Saved Reports (optional)

Load A Saved Report: - Choose One -

Delete Selected Report

Fields Reported

Available Fields:

▶ Contact Information

▶ Member Information

▶ Web-Page Information

▶ Billing Information

☒ Renewal Month

☐ Billing Contact

☐ Billing Address 1

☐ Billing Address 2

☐ Billing City

☐ Billing State

☐ Billing Zip

☐ Billing Country

☐ Full Billing Address

☒ Recurring Fees and Dues List

☐ Annual Fees and Dues Amount

☐ Account ID

☐ Billing Email

☐ Billing Rep Greeting

☐ Billing Rep Firstname

☐ Billing Rep Lastname

Continue

Selected Fields:

Company Name

Renewal Month

Recurring Fees and Dues List

Primary Sort: Renewal Month

Secondary Sort: Recurring Fees and Dues List


- Filter by Member Status = Active
- Click 'View/Print Report' or Download Report to .csv file

chambermaster PRO

Find Add Michelle's Chamber / ID:1528

Search Help...

Dashboard
Members
Groups
Communication
Events
Jobs
Advertising
MarketSpace
News Releases
Info Request
Billing
Reports
Cloud Drive
Form Builder
SmartMobile
eCommerce
Project/Task
Setup
Account
Training
Support Help/Wiki
f t in
Linked Accounts

Task List 

6 Mbr Signups
5 Hot Deals
1 MarketSpace
3 News
Releases
1 New Events
1 Inb Postings

Reports

Member Listing

Filters (optional)

Filter by Member Status:

☒ Active ☐ Non Member ☐ Inactive

Filter by Membership Type:

☐ Courtesy ☐ Prospective ☐ Bronze ☐ Silver ☐ Gold ☐ TEST Type ☐ Platinum ☐ Training

Filter by Group:

Select a group...

Filter by Sales Rep:

Select a Sales Rep...

Filter using Additional Criteria:

	Field Name	Operator	Value	
	Select a field	EqualsExactly		remove
AND	Select a field	EqualsExactly		remove
AND	Select a field	EqualsExactly		remove

[Add Criteria](#)

Additional Options

Report Format:

☒ Table Style (each field is listed in it own column)
☐ Directory Style (each field is listed on a new line)
☐ Show field names for all data reported
☐ Customized Report Layout [select a template](#)

Save Report (optional)

Save Current Report As: [Save](#)

[View/Print Report](#) [Download Report](#) [Change Report Options](#) [Create Group](#)

- Look for any Renewal Months that are '-not set-'
- Look for any missing Recurring Fees and Dues List

NOTE: Report filters can be changed to Primary Sort = Recurring Fees and Dues List to bring all missing item assignments to the top of the list.

<div> Print Report Print PDF Create Group </div>		
Member Listing		
Company Name	Renewal Month	Recurring Fees and Dues List
Michelle's Pet Shop	-not set-	
Credit Card Test 2	-not set-	
Credit Card Test 3	-not set-	
2nd attempt	-not set-	Quarterly Membersip: \$500.00 Quarterly
BlueWave Express Car Wash	April	
Credit Card Test	April	Capital Fund Voluntary Contribution: \$25.00 Annually Membership Dues: \$250.00 Annually
Magnificent Mutts	December	Capital Fund Voluntary Contribution: \$0.00 Annually Membership Dues: \$500.00 Annually Pledge ECON: \$100.00 Annually
Michelle's Company	February	Capital Fund Voluntary Contribution: \$0.00 Annually Membership: \$206.00 Annually Membership Dues: \$350.00 Annually Parking Lot Rent: \$10.00 Monthly Parking Lot Rent: \$50.00 Monthly Pledge ECON: \$100.00 Annually
Michelle's Pets and More	February	Capital Fund Voluntary Contribution: \$0.00 Annually Membership: \$412.00 Quarterly Membership Dues: \$350.00 Annually Parking Lot Rent: \$10.00 Monthly Parking Lot Rent: \$50.00 Monthly Pledge ECON: \$100.00 Annually
Atlanta Group	February	Capital Fund Voluntary Contribution: \$25.00 Annually Membership Dues: \$250.00 Annually Quarterly Membersip: \$500.00 Quarterly
TESTTEST	February	Membership Dues: \$750.00 Annually
		Capital Fund Voluntary Contribution: \$0.00 Annually