

# ChamberMaster/MemberZone Event Setup

# Agenda

Manage Registrations, Back Office and Online

Manage Guest List

Manage Event Sponsors

Review Reports for Name Tags, Check-in Roster, etc.

Manage Event Invoicing

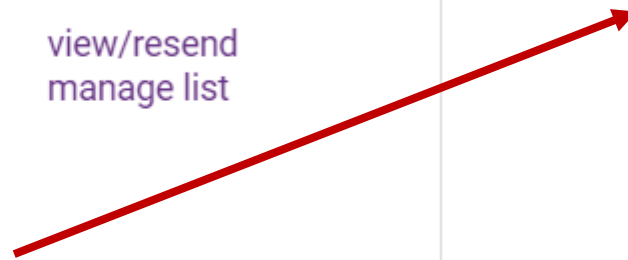
## Create Invitations

WIKI: [Send Invitations](#)

### Invitations ?

Declined: 8  
No Response: 47 [view/resend manage list](#)

[Create Invitations](#)



### Add Invitations for Ye Old BBQ

#### Add Invitees

- ▶ [Create a new person or company entry](#)
- ▶ [Add invitees/registrants 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 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](#)

#### Invitations

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

# Events Module

## Managing Attendees

WIKI: [Manage Invitee List](#)

























[Click Here](#) for an Overview of Working with the Guest List

Guest List

Need help? ⓘ

Status: Show All Paid: Show All More Options Clear Filters

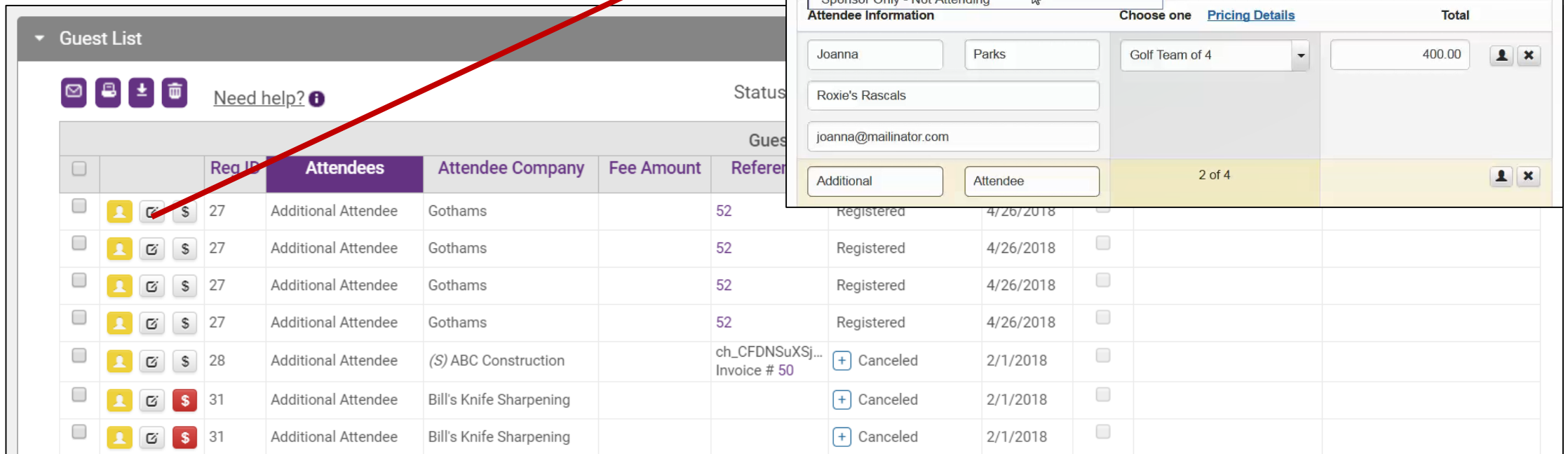
300 per page 1 - 42 of 42

| <input type="checkbox"/> |   | Reg ID | Attendees           | Attendee Company        | Fee Amount | Reference                       | Status   | Reg Date  | Online                   | Attendee Comments | Registration Comments |
|--------------------------|---|--------|---------------------|-------------------------|------------|---------------------------------|--|-----------|--------------------------|-------------------|-----------------------|
| <input type="checkbox"/> |          | 27     | Additional Attendee | Gothams                 |            | 52                              | Registered   | 4/26/2018 | <input type="checkbox"/> |                   |                       |
| <input type="checkbox"/> |          | 27     | Additional Attendee | Gothams                 |            | 52                              | Registered   | 4/26/2018 | <input type="checkbox"/> |                   |                       |
| <input type="checkbox"/> |       | 27     | Additional Attendee | Gothams                 |            | 52                              | Registered   | 4/26/2018 | <input type="checkbox"/> |                   |                       |
| <input type="checkbox"/> |    | 27     | Additional Attendee | Gothams                 |            | 52                              | Registered   | 4/26/2018 | <input type="checkbox"/> |                   |                       |
| <input type="checkbox"/> |    | 28     | Additional Attendee | (S) ABC Construction    |            | ch_CFDNSuXSj...<br>Invoice # 50 |  Canceled | 2/1/2018  | <input type="checkbox"/> |                   |                       |
| <input type="checkbox"/> |    | 31     | Additional Attendee | Bill's Knife Sharpening |            |                                 |  Canceled | 2/1/2018  | <input type="checkbox"/> |                   |                       |
| <input type="checkbox"/> |    | 31     | Additional Attendee | Bill's Knife Sharpening |            |                                 |  Canceled | 2/1/2018  | <input type="checkbox"/> |                   |                       |

## Cancel Registration

- Click the Edit Registration icon
- Change Status to Cancelled

WIKI: [Cancel Registration](#)



The screenshot shows the 'Guest List' interface with an 'Edit Registration' modal open. The modal displays the 'Registration Information' section, where the 'Status' dropdown menu is open, showing options: Registered, Invitation Declined, Registered, Canceled (highlighted), and Sponsor Only - Not Attending. Below the status dropdown, the 'Attendee Information' section shows fields for Name (Joanna), Company (Parks), and Event (Golf Team of 4). The 'Total' field shows 400.00. The modal also shows 'Additional' and 'Attendee' tabs, with '2 of 4' attendees listed. The background shows a table of guest registrations with columns for Reg ID, Attendees, Attendee Company, Fee Amount, and Status. A red arrow points from the 'Edit Registration' icon in the Guest List to the modal.

| Reg ID | Attendees           | Attendee Company        | Fee Amount | Status     |
|--------|---------------------|-------------------------|------------|------------|
| 27     | Additional Attendee | Gothams                 | 52         | Registered |
| 27     | Additional Attendee | Gothams                 | 52         | Registered |
| 27     | Additional Attendee | Gothams                 | 52         | Registered |
| 27     | Additional Attendee | Gothams                 | 52         | Registered |
| 28     | Additional Attendee | (S) ABC Construction    | 52         | Canceled   |
| 31     | Additional Attendee | Bill's Knife Sharpening | 52         | Canceled   |
| 31     | Additional Attendee | Bill's Knife Sharpening | 52         | Canceled   |

## Change Attendee information

- Click the Edit Attendee Icon

**Guest List**

Need help?

|                          |  | Reg ID | Attendees           | Attendee Company        | Fee Amount                      |            |           |                          |  |  |  |
|--------------------------|--|--------|---------------------|-------------------------|---------------------------------|------------|-----------|--------------------------|--|--|--|
| <input type="checkbox"/> |  | 27     | Additional Attendee | Gothams                 | 52                              | Registered | 4/26/2018 | <input type="checkbox"/> |  |  |  |
| <input type="checkbox"/> |  | 27     | Additional Attendee | Gothams                 | 52                              | Registered | 4/26/2018 | <input type="checkbox"/> |  |  |  |
| <input type="checkbox"/> |  | 27     | Additional Attendee | Gothams                 | 52                              | Registered | 4/26/2018 | <input type="checkbox"/> |  |  |  |
| <input type="checkbox"/> |  | 27     | Additional Attendee | Gothams                 | 52                              | Registered | 4/26/2018 | <input type="checkbox"/> |  |  |  |
| <input type="checkbox"/> |  | 28     | Additional Attendee | (S) ABC Construction    | ch_CFDNSuXSj...<br>Invoice # 50 | Canceled   | 2/1/2018  | <input type="checkbox"/> |  |  |  |
| <input type="checkbox"/> |  | 31     | Additional Attendee | Bill's Knife Sharpening |                                 | Canceled   | 2/1/2018  | <input type="checkbox"/> |  |  |  |
| <input type="checkbox"/> |  | 31     | Additional Attendee | Bill's Knife Sharpening |                                 | Canceled   | 2/1/2018  | <input type="checkbox"/> |  |  |  |

### Edit an Attendee

\* Required fields are not enforced for staff

Show Mailing Address

First Name: \*  Last Name: \*  Email: \*

Company Name:  Title:  Phone:

Comments:

**Record Association**

This record is associated with **Roxie's Rascals**

Registered by: Training Training (Company Name)


# Working with Sponsors

You can add sponsors through the database, or sponsors are added automatically when a registrant selects a registration fee that you have designed to automatically add as a sponsor

WIKI: [Working with Sponsors](#)

← Sponsor Web Display Options →

Click the Sponsor name in the List of Sponsors above to edit the Sponsor Web Display Options.

| Image Type     | Image   | Size     | Action   |
|----------------|---|----------|--|
| Sponsor Logo ? |  | 150 x 99 | <a href="#">Change Image</a><br><a href="#">Remove Image</a> |

Logo Link URL:  [Use Member Website](#)

Logo Placement:

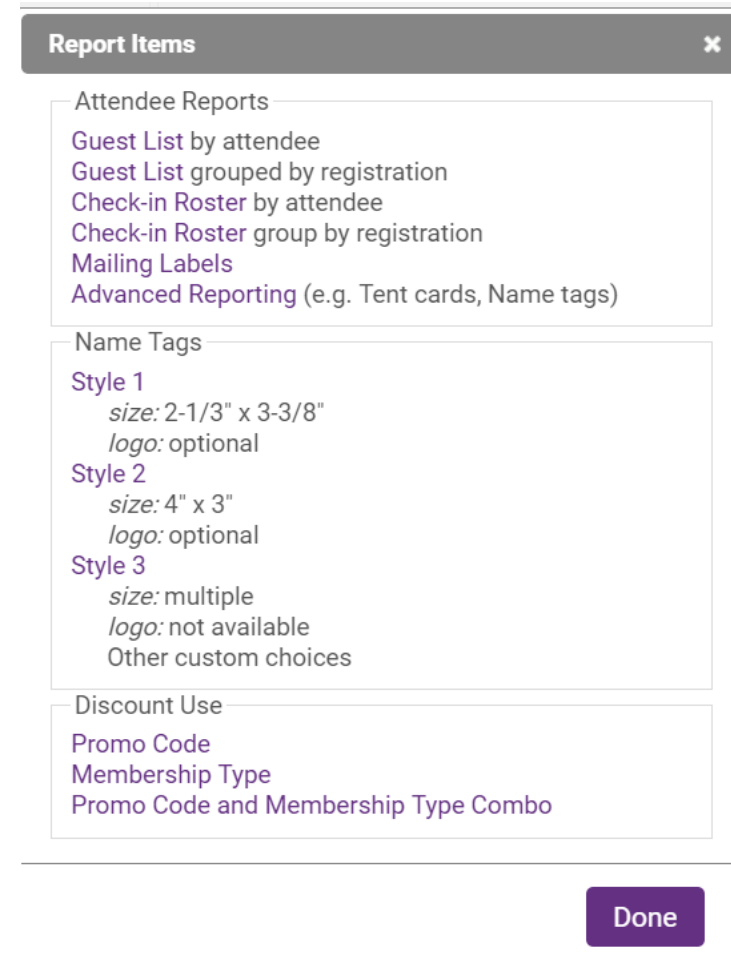
Sponsorship Level:  [Edit Sponsorship Levels](#)

Logo Sort Order:

# Events Reports & Labels

Within the Events module, reports, labels, and downloads are available at the bottom of a number of the lists which may give the desired options right there.

WIKI: [Reports & Labels](#)



**Report Items** [X]

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



# Event Invoicing

If you have allowed for invoicing of event registrations, you can easily create and deliver invoices directly from the Event Account Tab

WIKI: [Create Event Invoices & Sales Receipts](#)

Events

Calendar General Fees Sponsors Advanced Guest List **Account** Files Tasks

### Ye Old BBQ

6 Registration(s) have been marked for invoicing but have not been invoiced yet.

Create Invoices Now

#### General Summary

| Ye Old BBQ  |           |
|---|-----------|
|   | 8/31/2018 |
| Total Event Fees (includes No Charge registrations) | 10290.00  |
| Total Cancelled Fees                                | 2040.00   |
| Total Income Billed (Tax not included)              | 6730.00   |
| Total Income Paid (Tax not included)                | 3690.00   |
| Total Registrations                                 | 13        |
| Total Registered Guests                             | 24        |
| Actual Attendance                                   | 6         |
| Charge by Payment Type (Tax included)               |           |
| No Charge   | 0.00      |
| Credit Card   | 2125.00   |

**Attendance Goal** 6 of 100

**Sponsors Goal** 10 of 100

**Total Revenue Goal** \$10,290.00 of \$2,500.00 (Goal Exceeded!)

**Sponsorship Revenue Goal** \$9,160.00 of \$5,000.00 (Goal Exceeded!)

**Sponsorship Fee Items**

Ye Ol' Barbecue Sponsor (With Dinner for 2) 9 of 0 (Goal Exceeded!)

Questions??