

ChamberMaster/MemberZone Event Management

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

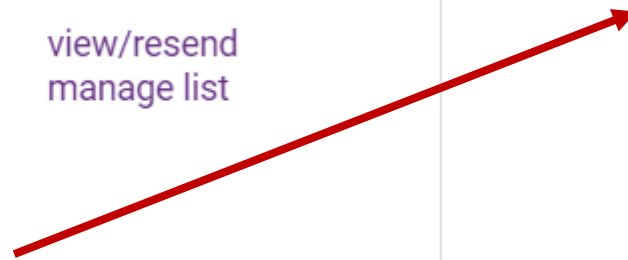
WIKI: [Send Invitations](#)

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... 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"/>		

If you have checked **Enable waiting list** on the General tab, if you have reached the **Limit Attendee Count To** number, people wishing to register for the event will be notified that the event is full and asked if they would like to be placed on a waiting list.

WIKI: [Working with the Waiting List](#)



The screenshot shows a window titled "Manage Waiting List" with a close button (X) in the top right corner. Below the title bar, there are two links: "Add to Waiting List" and "Download List". The main content is a table with the following data:


Date/Time Added	Guest	Company	Email Address	Phone	Qty	Actions
2/1/2018 8:30 AM	Kaylee Harkens	Harkens Zoo	zoo@mailinator.com		4	Register Remove
2/1/2018 9:37 AM	Lang Larson	Lang's Candles	candles@mailinator.com		4	Register Remove











At the bottom right of the window, there is a "Done" button.

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... 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

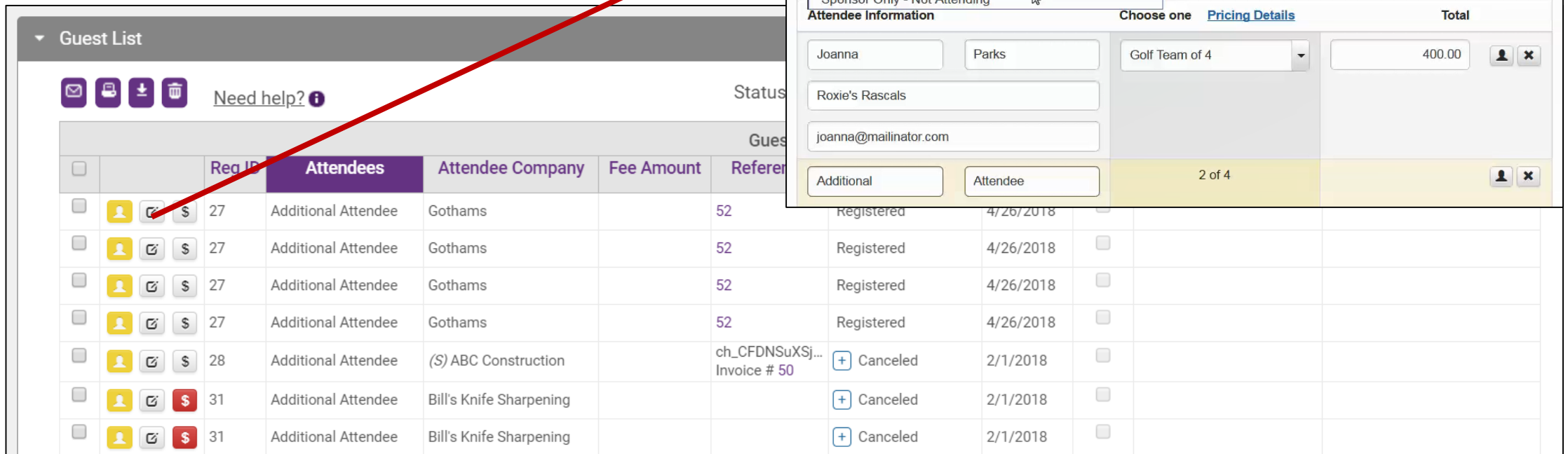
This record is associated with **Roxie's Rascals** 

Registered by: Training Training (Company Name)

Cancel Registration

- Click the Edit Registration icon
- Change Status to Cancelled

WIKI: [Cancel Registration](#)



The screenshot displays the 'Guest List' interface with a table of registrations. The table has columns for 'Reg ID', 'Attendees', 'Attendee Company', 'Fee Amount', and 'Refer'. The 'Attendees' column contains icons for edit and delete. A red arrow points from the edit icon of the first row to the 'Edit Registration' modal.

The 'Edit Registration' modal is open, showing the 'Registration Information' section. The 'Status' dropdown menu is expanded, showing options: 'Registered', 'Invitation Declined', 'Registered', 'Canceled', and 'Sponsor Only - Not Attending'. The 'Canceled' option is highlighted in blue.

The 'Attendee Information' section shows fields for 'Attendee Name' (Joanna), 'Attendee Company' (Parks), 'Attendee Email' (joanna@mailinator.com), and 'Attendee Type' (Attendee). The 'Total' field shows 400.00.

Reg ID	Attendees	Attendee Company	Fee Amount	Refer
27	Additional Attendee	Gothams	52	
27	Additional Attendee	Gothams	52	
27	Additional Attendee	Gothams	52	
27	Additional Attendee	Gothams	52	
28	Additional Attendee	(S) ABC Construction		ch_CFDNSuXSj... Invoice # 50
31	Additional Attendee	Bill's Knife Sharpening		
31	Additional Attendee	Bill's Knife Sharpening		


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	Change Image Remove Image

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

Logo Placement:

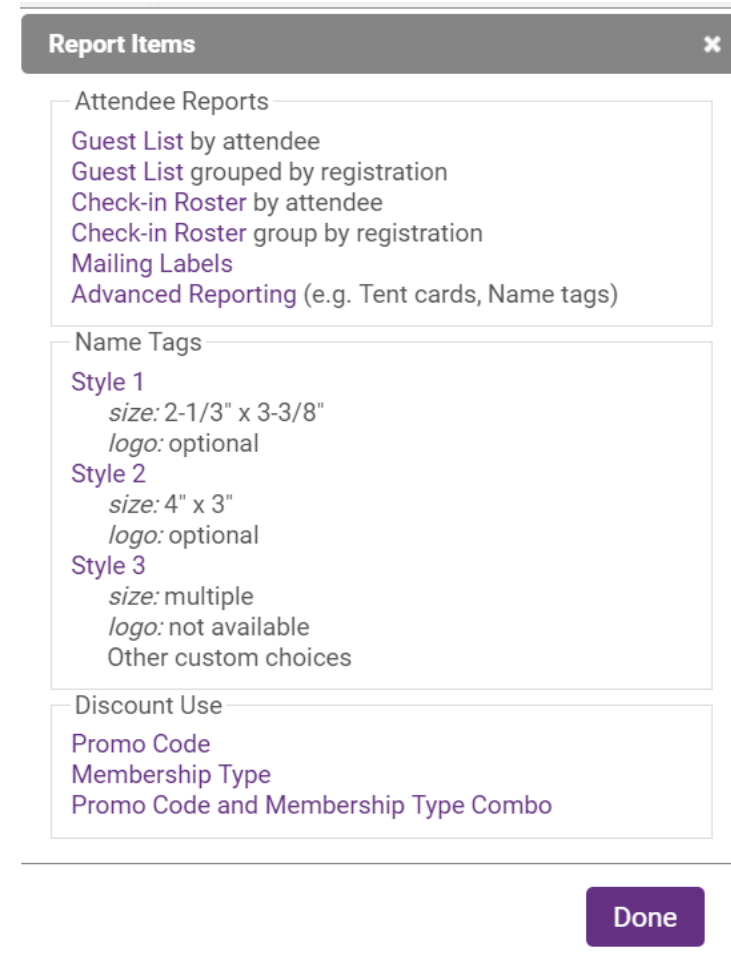
Sponsorship Level: [Edit Sponsorship Levels](#)

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 ✕

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

You can print a roster, and manually check people off the list as they arrive at your event, or you can check them in from the **Registered Attendee Info** section of the **Guest List Summary**

Guest List Summary

Invitations ?

Declined: 9
No Response: 50 [view/resend manage list](#)

Create Invitations

Registrations

Registered: 21
Canceled: 15
Incomplete: 0

Waiting List: 0
Available: 19

Add New Registration

Registered Attendee Info

Paid: 10
Unpaid: 11

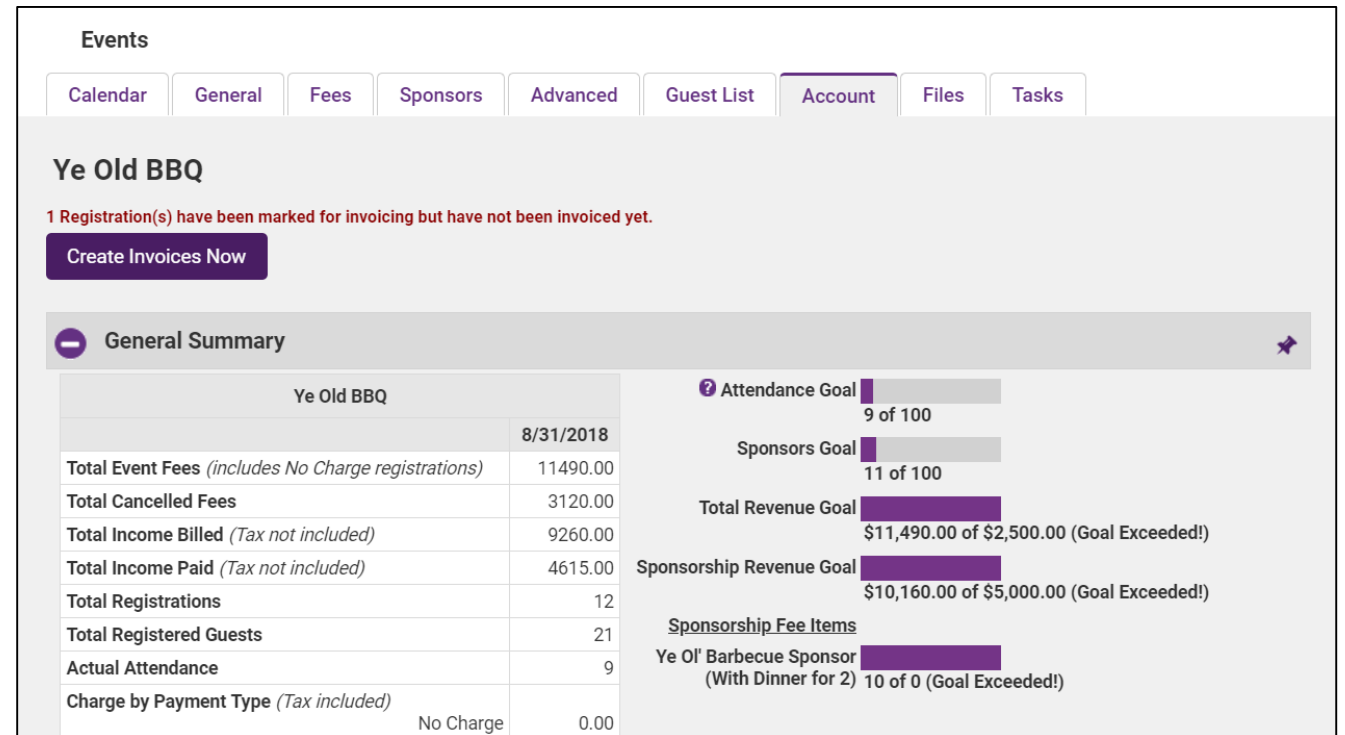
Actual Attendance: 9 [send email to attendees](#)

View/Edit Attendance List

Event Attendance					
Ye Old BBQ					
<input type="checkbox"/>	Company Name	Attendee First Name	Attendee Last Name	Primary Contact Company	Attendee Comments
<input checked="" type="checkbox"/>	Blossoms	Blake	Jones	Blossoms	
<input checked="" type="checkbox"/>	Brown's Shoes	Erik	Brown	Brown's Shoes	
<input checked="" type="checkbox"/>	Brown's Shoes	Naomi	Brown	Brown's Shoes	
<input checked="" type="checkbox"/>	Dorrie's Fish Finders	D	I	Dorrie's Fish Finders	
		Attendee	Gothams		
		Attendee	Gothams		
		Attendee	Gothams		
		Gotham	Gothams		
		Gotham	Gothams		
		Attendee	Jenna's		
		Marksone	Jenna's		

Running totals of income billed and paid, registrations, invitations, and a list of event sponsors for an event can be viewed on the Account tab

WIKI: [View Account Information](#)



The screenshot displays the 'Events' interface with the 'Account' tab selected for the event 'Ye Old BBQ'. A notification states: '1 Registration(s) have been marked for invoicing but have not been invoiced yet.' with a 'Create Invoices Now' button.

General Summary

Ye Old BBQ	
	8/31/2018
Total Event Fees (includes No Charge registrations)	11490.00
Total Cancelled Fees	3120.00
Total Income Billed (Tax not included)	9260.00
Total Income Paid (Tax not included)	4615.00
Total Registrations	12
Total Registered Guests	21
Actual Attendance	9
Charge by Payment Type (Tax included)	
No Charge	0.00

Attendance Goal: 9 of 10

Sponsors Goal: 11 of 100

Total Revenue Goal: \$11,490.00 of \$2,500.00 (Goal Exceeded!)

Sponsorship Revenue Goal: \$10,160.00 of \$5,000.00 (Goal Exceeded!)

Sponsorship Fee Items

- Ye Ol' Barbecue Sponsor (With Dinner for 2): 10 of 0 (Goal Exceeded!)

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??