

# ChamberMaster/ MemberZone Administrative Setup

# Agenda

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- Adjust browser settings
- Update organization information
- Manage employees and reps
- Manage Business Categories
- Update Membership Types



# Adjusting Your Browser Settings

- Configuration changes to web browser may be required during first use
  - Ex: Disable pop-up blocker
- Only need to be done once
  - Check again if updates made to web browser, pop-up blocker software or operating system
- KB: [Configuring your web browser](#)



# Updating Organization Information

- General Association Information
  - Name
  - Address
  - Contact Information
  - Logo
- KB: Setup Organization Information

General Association Information

Name: Kalamazoo Area Chamber

Street: 1903 W. Michigan Ave.

City: Kalamazoo

State: MI

Postal Code: 49008

United States

Time Zone: (GMT-05:00) Eastern Time

Culture Code: en-US [Advanced](#)

Main Phone: 555-555-5555

Toll Free Phone:


Fax:


eMail: kalamazoochamberinfo@mailinator.com

Web-Site Address: http://minnewaukan.smartcms.site/

Employees/Reps: Sandra Dee  
[Add / Remove](#) Elizabeth Diephouse  
Anna East

Primary Contact: Elizabeth Diephouse

Business Logo: 

Business Icon:  [Change Image](#)

[Save Changes](#)

# Setting Up Your Staff

- GrowthZone support team will provide your initial login name and for single staff person
- Create additional logins
- Manage permission levels of staff
- KB: Manage Staff Logins and Permissions

Organization Management

Kalamazoo Area Chamber

List of Representatives filter options

entries 1 - 8 of 8

Association Representatives				
<a href="#">check all</a> <a href="#">clear all</a>	Rep Name	Status	Title	Email
<input type="checkbox"/>	<a href="#">Sandra Dee</a>	Active		<a href="mailto:sandrad@mailinator.com">sandrad@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Elizabeth Diephouse</a>	Active	Owner	<a href="mailto:ediephouse@mailinator.com">ediephouse@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Anna East</a>	Active	Marketing Director	<a href="mailto:annaeast@mailinator.com">annaeast@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Claire Fraiser</a>	Inactive	Executive Financial Officer	<a href="mailto:clairefraiser@mailinator.com">clairefraiser@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Brenda French</a>	Inactive		<a href="mailto:brendafr@mailinator.com">brendafr@mailinator.com</a>
<input type="checkbox"/>	<a href="#">John-Jacob Jingleheimer-Schmidt</a>	Active	Membership Director	<a href="mailto:jjs@mailinator.com">jjs@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Andrew Lewis</a>	Active	Chief Financial Officer	<a href="mailto:andylewis@mailinator.com">andylewis@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Mary West</a>	Active	Chief Information Officer	<a href="mailto:mwest@mailinator.com">mwest@mailinator.com</a>

[Send Email](#) [Print Labels](#) [Remove/Inactivate Reps](#) [Add a New Rep](#)

# Add New Staff Member

- Login Name
- Password
- Database Permissions
- Email Notifications
- KB: Add New Staff Member

### Add a New Chamber Staff Member/Representative

**Personal Information**

Prefix:  [edit prefixes](#) Greeting:

First Name:\*  Job Title:

Middle Name:   Primary Contact

Last Name:\*

Suffix:  [edit suffixes](#)

**Contact Information** [▶ copy business information](#)

Contact Preference:\*  eMail  Phone Preference:\*  Work Phone

Address:  1903 W. Michigan Ave.  Work Phone:  555-555-5555

Home Phone:

City/State/Zip:  Kalamazoo  MI  49008  Cell Phone:

Country:  Alt. Phone:

eMail:  kalamazoochamberinfo@mailinat  Fax:

Comments:

# Staff Permissions

- **Administrator:** all available rights in the software
  - Full access to all financial and setup areas
  - Able to add new database fields within the software screens
- **Finance:** all rights except ability to modify Setup selections
- **Standard User:** all rights except ability to modify Setup selections and access the QuickBooks or Billing menu
  - Still allow the ability to view invoice and payment activity on the members' account

**Permissions for Elizabeth Diephouse**

Login Account: Login Name: **Elizabeth** [use email](#)  
Password: \*\*\*\* [edit password](#)

Database Permissions:  Allow Elizabeth Diephouse to log in to the database  
Permissions: Administrator

SmartCMS Permissions:  Allow Elizabeth Diephouse to access the SmartCMS [more](#) website(s) **i**

# Staff Email Notifications

- Configure which staff/employees receive email notifications when certain triggers met
- Helpful for different roles
  - Ex: Membership Director, Marketing Dept., etc.
- KB: [Set Email Notifications](#)

Additional Settings for Sandra Dee

**Email Notifications** ⓘ

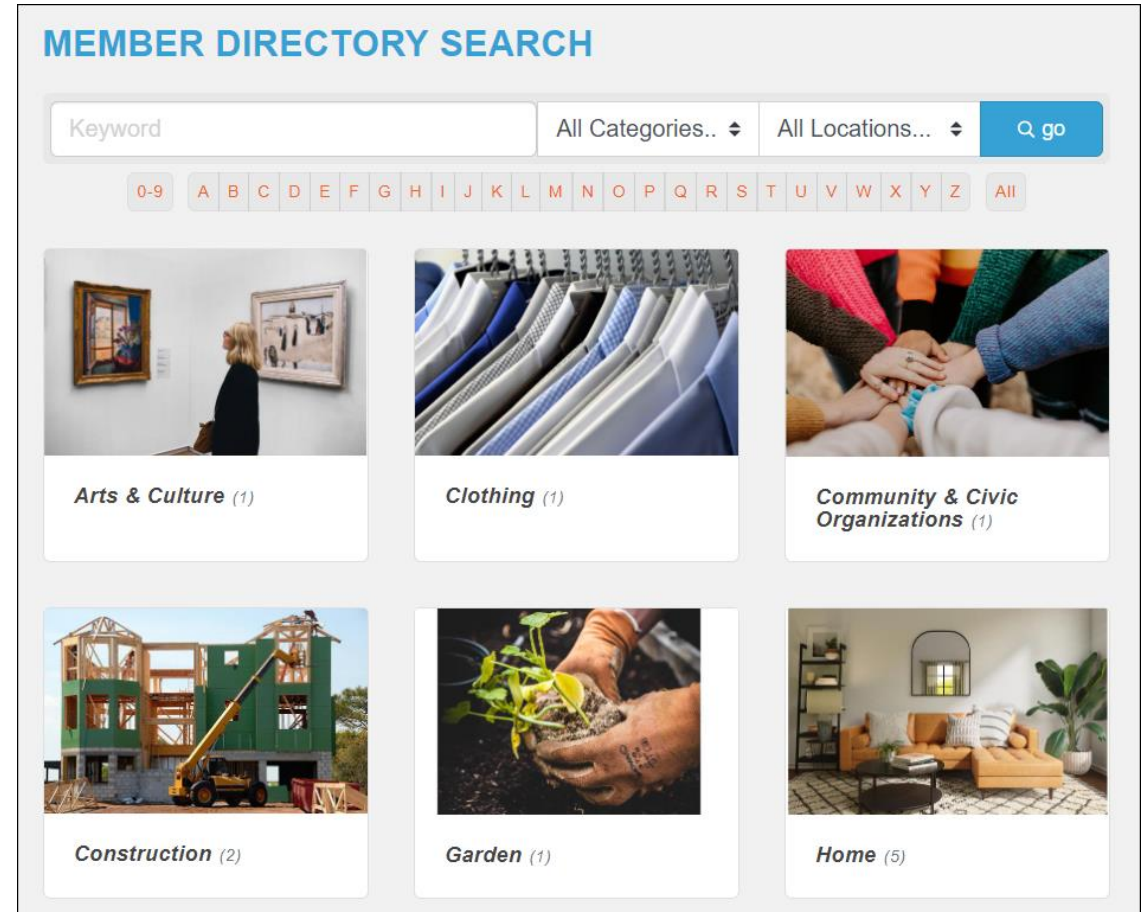
- New Member Application
- Member Modified their Membership Info
- Content (deal, job, event etc.) was submitted that may need approval
- Referral of membership prospect suggested by a member
- Member posted in the social feed
- Member sent communication to another member
- All Web Leads pending approval
- New Representative Created
- Representative Group/Interest Changed
- Request for Proposal Submitted
- "Unsubscribe All" was submitted by email recipient
- Content (job,event) was submitted by the public that may need approval
- Invalid Email Address Notifications

Save Cancel



# Setting Up Directory Categories

- Directory Category
  - Indicates where members will be displayed within online directory
- Quick Links are main categories within directory
  - Prepopulated with industry standard links
  - Customizable
- KB: Working with Directories







# Membership Types

- Common uses:
  - Reporting
  - Communication
  - Discounts
  - Grouping
- KB: [Membership Types](#)
- KB: [How Are Membership Types Used?](#)

### Membership Types

Current Definitions

Membership Type	v4 Display	v3 Display Icon
Basic	<input type="checkbox"/>	set icon
Bronze	<input checked="" type="checkbox"/>	
Cobalt	<input checked="" type="checkbox"/>	set icon
Copper	<input checked="" type="checkbox"/>	set icon
Diamond	<input checked="" type="checkbox"/>	set icon
Gold	<input checked="" type="checkbox"/>	
Platinum	<input checked="" type="checkbox"/>	set icon
Premium	<input checked="" type="checkbox"/>	
Silver	<input checked="" type="checkbox"/>	

[Add a New Type](#)

[Continue](#) [Cancel](#)

# Future Training

- Check out the [Training Calendar](#) to register for your continued and future training!

## ChamberMaster/MemberZone Training

Looking for on-demand training? Follow the links below to find the session you're looking for! Live sessions will be added to the calendar as they are scheduled.


**ChamberMaster Essentials:** These sessions cover the basics of your ChamberMaster software. Sessions available are: Solution Overview, Administrative Setup, Working with Communications, Working with Groups, Member Management, Member Information Center (aka MIC), Billing Setup, Daily Billing Activities, Event Setup, and Event Management. Several Advanced Topics are also available.

**ChamberMaster "5 Ways"...** Our series of "5 ways" videos covers a variety of topics to enhance and expand your knowledge of what ChamberMaster/MemberZone can do for you.

What are you looking for? Categories Show Events Happening... Search

1/1/2023 - 12/31/2023 X

Results: 23

TUE	January 3	 TRAINING WORKSHOP	<b>LIVE ChamberMaster/MemberZone: Solution Overview</b> 12:00 PM - 1:00 PM New to ChamberMaster/MemberZone? Need a refresher on what is available in your software? Are you an Exec with a desire to understand the resources available in ChamberMaster/MemberZone? Join us for a big picture overview of ...	Register
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# Questions?