ChamberMaster/ MemberZone Administrative Setup

Agenda

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

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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: <u>Configuring your web browser</u>

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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

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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		
check all clear all	Rep Name	Status	Title	Email
☐	Sandra Dee	Active		sandrad@mailinator.com
☐	Elizabeth Diephouse	Active	Owner	ediephouse@mailinator.com
☐	Anna East	Active	Marketing Director	annaeast@mailinator.com
☐	Claire Fraiser	Inactive	Executive Financial Officer	clairefraiser@mailinator.com
☐	Brenda French	Inactive		brendafr@mailinator.com
☐	John-Jacob Jingleheimer-Schmidt	Active	Membership Director	jjjs@mailinator.com
☐	Andrew Lewis	Active	Chief Financial Officer	andylewis@mailinator.com
▸ ☐	Mary West	Active	Chief Information Officer	mwest@mailinator.com

▸ Send Email   ▸ Print Labels   ▸ Remove/Inactivate Reps   Add a New Rep

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Add New Staff Member

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

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

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

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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

MEMBER DIRECTORY SEARCH

Keyword | All Categories.. | All Locations... | go

0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Arts & Culture (1)

Clothing (1)

Community & Civic Organizations (1)

Construction (2)

Garden (1)

Home (5)

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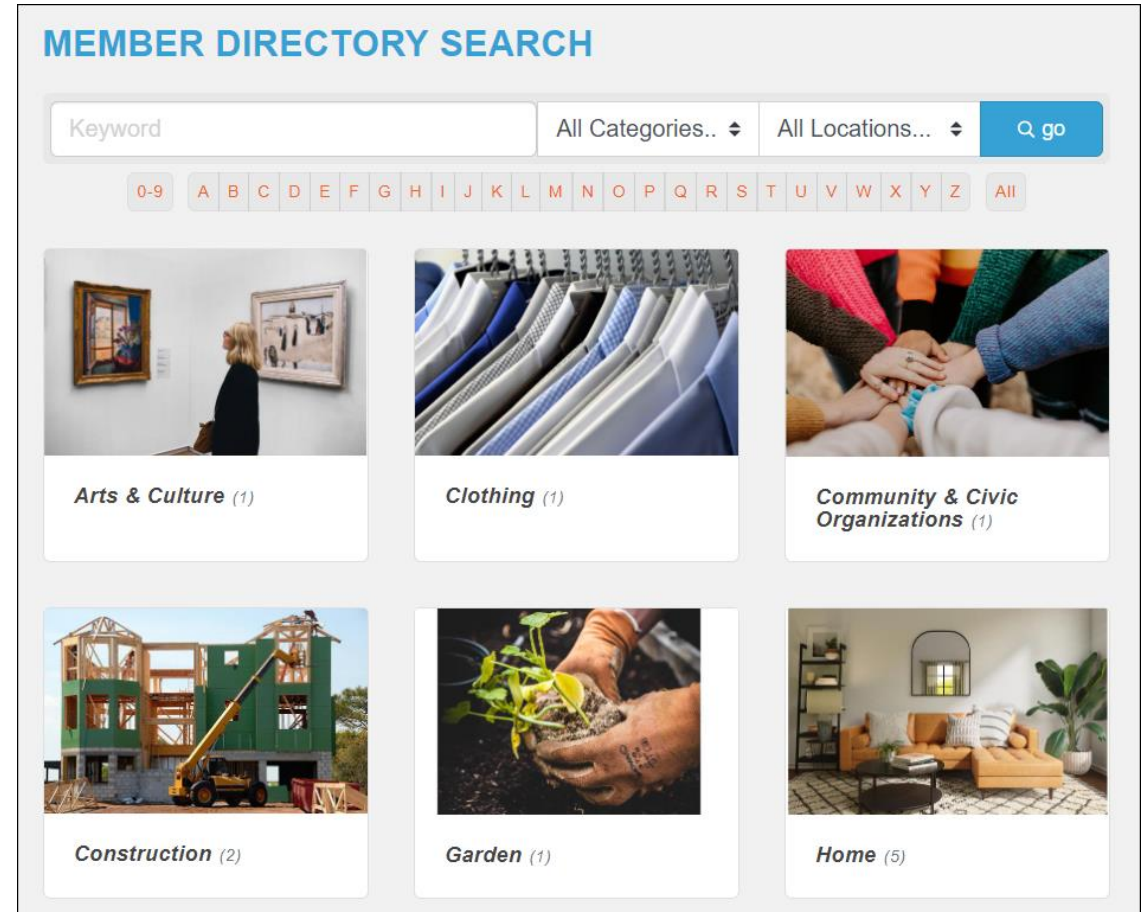
Membership Types

- Common uses:
  - Reporting
  - Communication
  - Discounts
  - Grouping
- KB: Membership Types
- KB: How Are Membership Types Used?

Future Training

- Check out the <u>Training Calendar</u> to register for your continued and future training!

Questions?