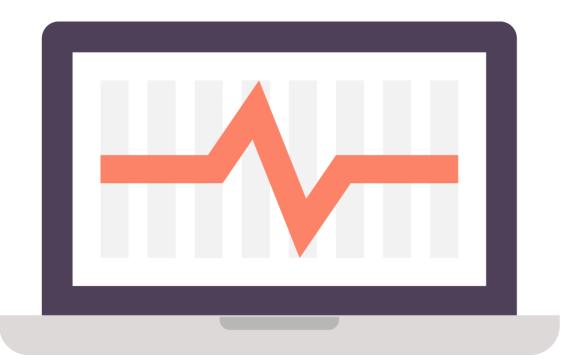
ChamberMaster/ MemberZone Member Administration



Agenda

- Create Member record
- Custom Fields
- Adding Reps to Member Record
 - Access to MIC
- Member Web Display Options
- Drop Members
- Reinstate Members
- Merge Members and Reps





Add New Member

- Simple process with Setup Wizard
- Will be asked to fill in the following information screens:
 - General Information
 - Additional Information
 - Billing Information
 - Web Display Information
- KB: <u>Add a Member</u>

Step 3: Billin	c Information tional Information g Information Display Information		
Company Name:			
Primary Phone:		Fax:	Call First
Alternate Phone:		Email:	
Toll-Free Phone:		Website:	•
Cell Phone:		Use Physical Address as the Mailing Address	
Physical Address:		Mailing Address:	
City:	Nisswa	City: Nisswa	
State:	Minnesota	State: Minnesota	
Zip:	56468	Zip: 56468	
Country:		Country:	
<< Back	Next >>	Finish	Cancel



3

Custom Fields

- Give ultimate flexibility in managing your data
- Track information unique to your association
- Creates database field available across all member records
- KB: <u>Custom Fields</u>

	Member		f the fields.		ember 🗸
	Member		f the fields.		
	Member			play order o	ag rows to change the dis
	Member				ustom Fields
	Permission	MIC Search	Field Size	Field Type	Field Name
			eneral	Ge	
Vrit 🗸 🛛 🕻	Read/Writ ~	~	edit items	Select	Reason for Joining
Vrit 🗸 🛛 🕻	Read/Writ ~		50	Text	Referred by
Vrit 🗸 🛛 🕻	Read/Writ ~	~	N/A	Boolean	Would you like a ribbon
Vrit 🗸 🛛 🕻	Read/Writ 🗸	~	N/A	Boolean	Would you like to volum
ed 🗸 (Disabled 🗸		edit items	Select	Would you serve on the
Vrit 🗸 🛛 🕻	Read/Writ 🗸	~	N/A	Boolean	Are you willing to host a
Vrit 🗸 🛛 🕻	Read/Writ 🗸	~	edit items	Select	Business District
Vrit 🗸 🛛 🕻	Read/Writ ~	~	edit items	Select	Number of Employees
Vrit 🗸 🛛 🕻	Read/Writ 🗸	~	N/A	Boolean	Women Owned?
Vrit 🗸 🛛 🕻	Read/Writ 🗸	~	N/A	Boolean	Veteran Owned?
Vrit 🗸 🛛 🕻	Read/Writ 🗸	~	N/A	Boolean	Minority Owned?
	Disabled V		50	Text	Why did you join?
	Disabl Read// Read// Read// Read// Read// Read//		edit items N/A edit items edit items N/A N/A N/A	Select Boolean Select Boolean Boolean Boolean	Would you serve on the Are you willing to host a Business District Number of Employees Women Owned? Veteran Owned? Minority Owned?



Add Reps

- Representatives related to member are managed on the Reps tab
 - Personal Information
 - Custom Fields
 - Display preferences for public website and MIC
 - Group Participation
 - Login Permissions
- KB: <u>Manage Member Reps</u>

ntries 1 -	5 of 5 Display 100 🗸	results per page.							
Member Representatives									
<u>check all</u> <u>clear all</u>	Rep Name	Title	Status	Туре	Phone	Email			
•	Gordie Howe		Inactive		(123) 456-7890	ghowe@mailinator.com			
	Sarah Samuels	CFO	Active	Billing	(123) 456-7890	ssamuels@mailinator.com			
	Brendan Shanahan	Executive	Active		(123) 456-7890	bshanahan@mailinator.com			
	Mary West	Owner	Active	Primary	(123) 456-7890	mwest@mailinator.com			
	Steve Yzerman		Active		(123) 456-7890	YZeMan@mailinator.com			



Add a Prospective Member

- Use the same Setup Wizard provided for adding members
- Choose Prospect as status
- KB: <u>Add a Prospect</u>

Step 2: Add	c Information itional Information				
	ng Information Display Information				
	biopia) momanen				
Business Inforr	nation				
File-By Name:	Frollicles Hair Salon				
Status:		~	Join Date:		
Member Type:	Courtesy				
Web-Participation:	Non-Member		Full-Time Emps: 0		
Sales Rep:	Prospective Dropped/Inactive		Part-Time Emps: 0		
Comment/Notes:	Cooppeanaere				
			11		
Categories:	Primary	Directory Category Nam	e Assign Categories		
Representatives:	Primary	Representative Name	, ice.g.i e a cyclice		
Representatives.			Add a New Rep		
<< Back	Next >>			Finish	Cancel
Buck					

memberzone

Add Fees for Membership

- Membership Fees & Dues can be assigned:
 - When adding new member
 - When member application
 processed
 - Directly through member's Account tab
- KB: <u>Assign Recurring</u> <u>Membership Fees</u>
- KB: Add Fees to Membership
- KB: Edit Recurring Fees & Dues

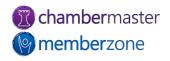
Drag fees in the order you want them to appear on the invoices when	you run	invoice batc	hes and clic	ck "Save".	
Name Bill-To Description	Qty	Frequency	Next Billed*	Amount**	
Silver Membership - New Membership dues for new (Membership Dues) Silver Membership.	1	Annually	Sep 2023	\$1200.00	



Add Web Information

- Information and settings related to member's online directory listing
- Changes automatically reflected in online directory
- Member may also modify these items in the MIC (with proper permissions)
- KB: <u>Member Web Display</u>
 <u>Options</u>





Drop Member

- Membership Status set to inactive
 - Still have their history and information available in database
- Include information like drop date, drop reason, and drop details
- Members should only be deleted when history is not necessary or when a member was mistakenly created
- KB: <u>Drop a Member</u>

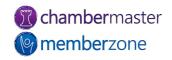
)rop l	Membe	er Options	6				
emor	nstratio	on Compa	any				
Drop Date:		2	Drop Reason:				~
Drop Details:							1
			Represe	ntatives			
	Contact Na	ime	Title	Rep Status	0	Group Statu	is 🕜
	All Me	mber Represe	ntatives		~		~
aul Demo	D			Set as Inactive	~	Leave Unchang	ed 🗸
	Current alance:	5000.00					
			Recurring Memb	ership Dues & Fees			
<u>check all</u> incheck all		Name		Description	Quan	tity Frequency	Amount*
	Full Memb	ership		1-year membership (often used after a prorated year)		Annually	\$2448.00
	Membersh	nip Dues	2019 Mem	bership Dues	1 Ann		\$124.00
	Prorated N	/lembership	first year m	embership, prorated	d 1	Annually	\$1400.00
▶ Remo	ve Selected	Fee Items					



Re-instate Dropped Member

- Change Membership Status
 back to Active
 - Will display options to return reps back to active status and reinstate their group participation if desired
 - Redirect Index
- KB: <u>Reactivate/Reinstate</u> <u>Member</u>

Bayside Pain	ting Com	pany				
		I	Representatives			
Contact N	ame	Rep	o Status 🛛 🔞		Group Status 🛛 🚱	
All Member Repre	esentatives			~		~
Dan Smith		Inactive		~	Leave Unchanged	~
Member Page and The following op • The Disab	otions have bee ble Login option	Inactive n set: has been cleared een set to "No Re		~	Leave Unchanged	~
The following op • The Disab	otions have bee ble Login option rect Index has b	n set: has been cleared een set to "No Re	edirect Action".			•
Member Page and The following op • The Disab • The Redir Display	otions have bee ble Login option rect Index has b	n set: has been cleared	edirect Action".		Leave Unchanged	~
Member Page and The following op • The Disab • The Redir Display	btions have bee ble Login option rect Index has b	n set: has been cleared een set to "No Re splay On Web	edirect Action".	in	No Web Link on Member Page	~



Merge Member/Rep Records

- Easily manage duplicate members in your database
 - Ex: Perhaps you had added a prospect, then the prospect applied online
- Best Practice: merge the older contact into the newer contact
- KB: <u>Merge Members</u>
- KB: <u>Merge Reps</u>

Member - Merge

Floral Design

Cancel

Only values that differ between the selected members will show up on the list below. Click on value you want to use for the final merged value from values for either **Floral Design** or **Flowery Branch Farm**. The currently selected value is highlighted in green.

After the merge is complete, please review Reps, Account, Advanced, and Marketing tabs to disable or delete any duplicate information if necessary.

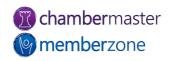
	Source Record	Destination Record	New Destination Record
Field	Floral Design (Created: 5/16/2017):	Flowery Branch Farm (Created: 10/25/2017):	Merged Value
Contact Fields			
Company Name	Floral Design	Flowery Branch Farm	Flowery Branch Farm
Email	flo@mailinator.com		
File-By Name	Floral Design	Flowery Branch Farm	Flowery Branch Farm
Primary Phone		(770) 559-8251	(770) 559-8251
Website		http://flowerbranchfarm.com	http://flowerbranchfarm.com
Physical Address F	ields		
City	Crosby	Newnan	Newnan
Address Line 1	21748 S Raider Court	123 Flowery Branch Road	123 Flowery Branch Road
Postal Code	56441	30265	30265
State/Province	MN	GA	GA
Mailing Address Fie	elds		
City	Nisswa	Newnan	Newnan
Country		US	US
Address Line 1	21748 S Raider Court	123 Flowery Branch Road	123 Flowery Branch Road
Postal Code	56468	30265	30265
State/Province	MN	GA	GA
Display Fields			



Future Training

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

	ng for on-dema		MemberZor e links below to find the session		ning for! Live sessions will be added to the ca	alendar as they are
Setup	, Working with	Communications, Work		nagement, Mem	rare. Sessions available are: Solution Ove ber Information Center (aka MIC), Billing le.	
Charr		mberZone can do for y	, ,	topics to enhar	ce and expand your knowledge of what Show Events Happening	Q Search
	lat are you toor		Categories		Show Events happening	Q Scarch
	2023 - 12/31/2023 ×					
Resi	ults: 23					
T U E	January 3	chambermaster memberzone TRAINING WORKSHOP	12:00 PM - 1:00 PM New to ChamberMaster/N your software? Are you an	1emberZone? N Exec with a des	ne: Solution Overview eed a refresher on what is available in re to understand the resources ?? Join us for a big picture overview of	Register



Questions?

