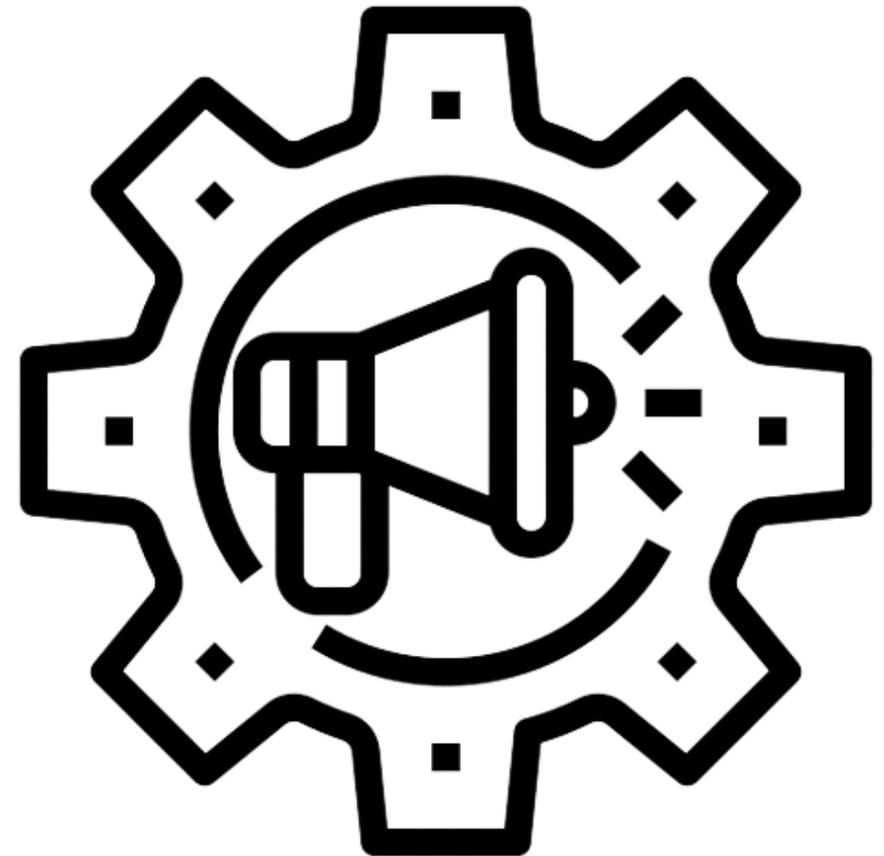


# ChamberMaster/ MemberZone Empowering Members Through the MIC: Setup and Best Practices

# Agenda

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- Overview of Member Information Center (MIC)
- MIC Initial Setup (Admin)
- Encourage Members to Update their Profile Information
- MIC Modules
  - Events, Resources, Reports, News
- Setup Member Rep Permission Levels (Admin)
- Managing Users Names/Passwords
  - Custom Rep Report
  - Verify Reps have Login Credentials



# Member Information Center (MIC)

- View/edit their Company Information
- Join Groups and Mailing Lists
- Pay bills
- Register for events
- View statistical reports
- Interact with each other with Community Feed
- View Hot Deals, Member-to-Member Deals, News Releases, and Job Postings
  - Submit for approval

The screenshot displays the Member Information Center (MIC) dashboard. At the top left is the Kalamazoo Area Chamber logo. A search bar is located at the top right, with the user logged in as Elizabeth Diephouse and an account settings dropdown. Below the search bar is a navigation menu with icons for Home, Directory, Events, Resources, Reports, News, and Settings. The main content area is divided into three columns. The left column contains a 'Shortcuts' section with links to Personal Information, Company Information, Hot Deals, Member To Member Deals, News Releases, Job Postings, MarketSpace, and Request for Proposals. Below this is a 'Links' section with 'MIC How To's' and links for adding job postings, news releases, and updating personal information. The middle column features a 'Welcome Message' with a 'Read Later' button, a 'Kalamazoo Area Chamber' logo, and a paragraph of text explaining the ChamberMaster service. Below the text is a 'Support LOCAL Businesses' logo. The right column contains an 'Upcoming Events' section for April 14, 2023, featuring the '2023 Golf Tournament'. Below this is a 'Member Profile' section showing a progress bar for 'Your Company Profile is 81%' and an 'UPDATE' button. At the bottom right is a 'Refer a Business for Membership' section with a 'Refer others to the Kalamazoo Area Chamber' button and a small image of people.

# MIC Rep Permissions

- Permission Sets
  - Limit the access reps have to MIC
- Predefined Permission Sets
  - Primary
  - Finance
  - Standard
  - Prospect
- Edit or add new Permission Sets
- KB: Set Rep Login Permissions

The screenshot displays the 'Manage Permission Sets' interface. At the top, there is a table listing existing permission sets:

Permission Sets	Reps	Del
<a href="#">Primary</a>	68	
<a href="#">Billing</a>	15	
<a href="#">Standard</a>	41	
<a href="#">Prospect</a>	13	
<a href="#">Blocked</a>	0	x

Below the table is a 'New Permission Set' button. The main configuration area is titled 'Permission Set Name: Primary'. It contains various permission categories with checkboxes and dropdown menus:

- Allow Login To MIC
- Allow Event Registrations
- Find Members (Enabled)
- Member Info
  - Read/Wri View/Pay Own Bills
  - Read/Wri View/Pay All Bills
  - Read/Wri Business Info
  - Read Onl Bus. Categories
  - Read/Wri Employees/Reps
  - Read/Wri Individual Profile
  - Read/Wri Login/Password
- Webpage Info
  - Read/Wri Webpage Info
  - Read/Wri Web Map Pin Info
  - Read/Wri Photos & Logos
  - Read/Wri Keywords
  - Read/Wri Links
- Advertising
  - Read/Wri Hot Deals
  - Read/Wri Job Postings
  - Read/Wri Events
  - Read/Wri MarketSpace
  - Read/Wri News Releases
- Reports
  - Enabled Banner Ad Impressions
  - Enabled Member Page Views
  - Enabled Hot Deal Views
  - Enabled Job Views
  - Enabled MarketSpace Views
  - Enabled Profile
  - Enabled Lead Lists
  - Enabled Referral Report
- User Manuals

Buttons for 'Save Permissions' and 'Close' are located at the bottom of the form.

# MIC Rep Credentials

- Important to provide credentials to MIC when adding reps to a member
- Create login for rep or [send email invitation](#)
  - Includes personalized link and instructions to create login
- KB: [Send Invitation to Create Credentials in MIC](#)

**Login Permissions for Betty Jones**

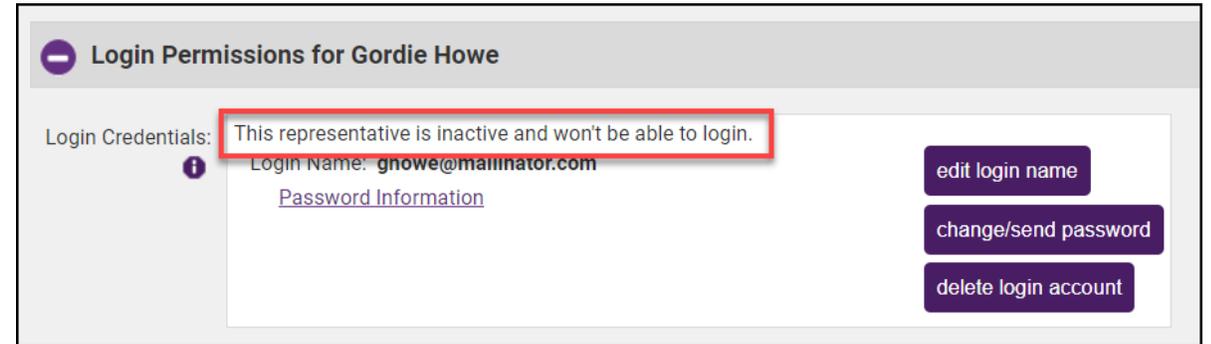
Login Credentials: [How come I can't see the password? Watch overview video or view slides](#)  
(ID #1425) Betty Jones can create his/her own personal login and password.  
**Create their login right now** or **send them an invitation** that lets them create their own.

Note: You will be able to edit the email before it is sent. You can also send a mass invite to all or selected reps using the "Create Login Account Invitation" email template.

Permissions: Inherited Permission  
Set: Primary [Change Set](#) [View and Manage Permissions](#)

# Manage Credentials

- When rep inactivated, login account automatically inactivated
  - Login account automatically reactivated if member reactivated
- Members may forget username/password
  - Username visible on Reps tab
  - Can reset rep's password if necessary
  - Send password reset email
- KB: Manage Rep Login Credentials



**Login Permissions for Gordie Howe**

Login Credentials: This representative is inactive and won't be able to login.

**Login Name:** gnowe@mailinator.com

[Password Information](#)

**edit login name**

**change/send password**

**delete login account**

# Verify Reps Have Logins

- Use Custom Representative Report
  - Include the field Rep Login Name
  - Filter to include records with empty Rep Login Name field
  - Generates list of members not setup in MIC
- Can save list as group for later use
  - Send group email to create login in MIC

Filter using Additional Criteria:

Criteria				
	Field Name	Operator	Value	
	Rep Login Name ▾	IsEmpty ▾		<a href="#">remove</a>
AND ▾	Select a field ▾	EqualsExactly ▾		<a href="#">remove</a>
AND ▾	Select a field ▾	EqualsExactly ▾		<a href="#">remove</a>

▸ [Add Criteria](#)

# Send Login Instructions Email

- Send mass email to group with instructions on creating logins
  - Use Create Login Account Invitation template
- Select appropriate permission set before sending email
- Send to rep's email address, not member's
- KB: Send Rep Invitation to Create Their Own MIC Credentials

Hello **[First Name]**,

You've just been invited to join the **Member Information Center (MIC)**, the online members-only area for **[organization\_name]**.

Benefits gained by being a member are available in many ways. Remember to take advantage of excellent opportunities for your business to attract new customers and share information with our community, region and even internationally.

Visit the registration page at [https://\[AName\]/CreateAccount?email=\[Email\]&repID=\[Representative ID\]](https://[AName]/CreateAccount?email=[Email]&repID=[Representative ID]) and start using your benefits immediately. Don't know your login? Enter your email address to be sent a reminder at [http://\[AName\]/login/forgotpwd](http://[AName]/login/forgotpwd)

- **Deals** - offer coupons and special deals; fellow members may well be your best customers.
- **Job postings** - submit your own job openings.
- **Advertise events** - add your events to our online event calendar displayed with quick links; use these links to share in your social media, text to mobile devices, add to your calendar, or email to others.
- **Network with other members** - check out other member listings, jobs, deals.

**Log in today to update your information and take advantage of these features!** You can manage your [billing](#), register for and [submit](#) events, and [interact](#) with other members in the MIC. Download the free [MemberPlus App](#) to access the MIC on the go!



Questions? Contact **[organization\_name]** at **[organization\_phone]** or email **[organization\_email]**.



# Member Profile Updates

- Profile Summary
  - At-a-glance view of member's profile
- Encourage members to keep their own information up to date in MIC
  - [Update Your Membership Listing email template](#)
- Save time and effort for your staff
- KB: [Send Email to Members to Update Information](#)

The screenshot displays the Kalamazoo Area Chambers (KAC) member profile interface. The user is logged in as Elizabeth Diepl. The profile page shows an overall completion status of 86%. The sections and their completion rates are as follows:

Section	Completion Rate	Action
Overall Profile	86%	update
Organization Information	86%	update
Website Information	81%	update
MapPin Information	100%	view
Photos & Logos	100%	view

The Organization Information section includes: Primary Phone, Email, Website, Physical Address, Mailing Address, and At Least One Category. The Website Information section includes: At Least One Social Network, Description, Results Summary, Hours Of Operation, Driving Directions, Additional Bulleted Description, and Keywords. The MapPin Information section includes: Map Link. The Photos & Logos section includes: Logo and Photos.

# Billing in MIC

- Make Payments
  - Membership Dues
  - Event registrations
  - Open invoices, etc.
- [Sign-up for Autopay](#) with [GrowthZone Pay](#)
  - Add [Payment Profile](#)
- View Transaction History
  - Verify payments made
  - Print invoices
  - View [credits](#)
- KB: [AutoPay & Billing Tab](#)

The screenshot shows the MemberZone interface for the Kalamazoo Area Chamber. The user is logged in as Elizabeth Diephouse. The main navigation bar includes Home, Directory, Events, Resources, Reports, News, and Settings. The left sidebar is open to the 'Billing' tab, which is highlighted with a red box. The Billing menu includes options for Payment Profiles, Make a Payment, Autopay & Billing, Transaction History, and Shopping Cart. The main content area displays 'My Payment Profiles' and 'Current Profiles', showing a single profile for a Visa card ending in 4242-01/2024. There is an option to 'Add a New Payment Profile'.

# Events in MIC

- Search event calendar
- Register for events
- Manage registrations
- View previously attended events
- Add and manage new events
  - Requires appropriate permissions
  - Staff approval required to publish

The screenshot displays the Kalamazoo Area Chamber of Commerce (KAC) Member Zone interface. The top navigation bar includes the KAC logo, a search bar, and a user profile for Elizabeth Diephouse. The main navigation menu features icons for Home, Directory, Events, Resources, Reports, News, and Settings. The Events section is active, showing a list of events with filters and search options. The events listed are:

- Weekly Trivia Night**: Thursday, February 16, 2023. Trivia Night at Bell's Brewery! ... more details --. Registration Not Available to Employee Logins. Categories: Just For Fun.
- High School Play**: Friday, February 17, 2023 - Sunday, February 19, 2023. ... more details --. Categories: Arts & Culture, Chamber of Commerce.
- Young Professionals Weekly Lunch**: Monday, February 20, 2023. The Young Professionals meet at Noon on Mondays from 12:00-1:00. It is a time to share a meal and network with other young professionals in the community. ... more details --. Registration Not Available to Employee Logins.

# Resources in MIC

- Add documents, video, or links to share with members
  - Example: Board meeting recording & minutes
- Reduce email overload
  - Central location for information
- Can limit resource to specific Group
  - Reduce risk of unauthorized access
- KB: Manage Resources in MIC

Search

Logged in as Elizabeth Diephouse  
Account Settings

Home Directory Events Resources Reports News Settings

Resources

View All Add Resource

Category

- Association Information (3)
- ChamberMaster (3)
- Education & Information (4)
- Events (1)
- National Chamber News (2)

File Type

- Video (4)
- Document (4)
- Website (3)

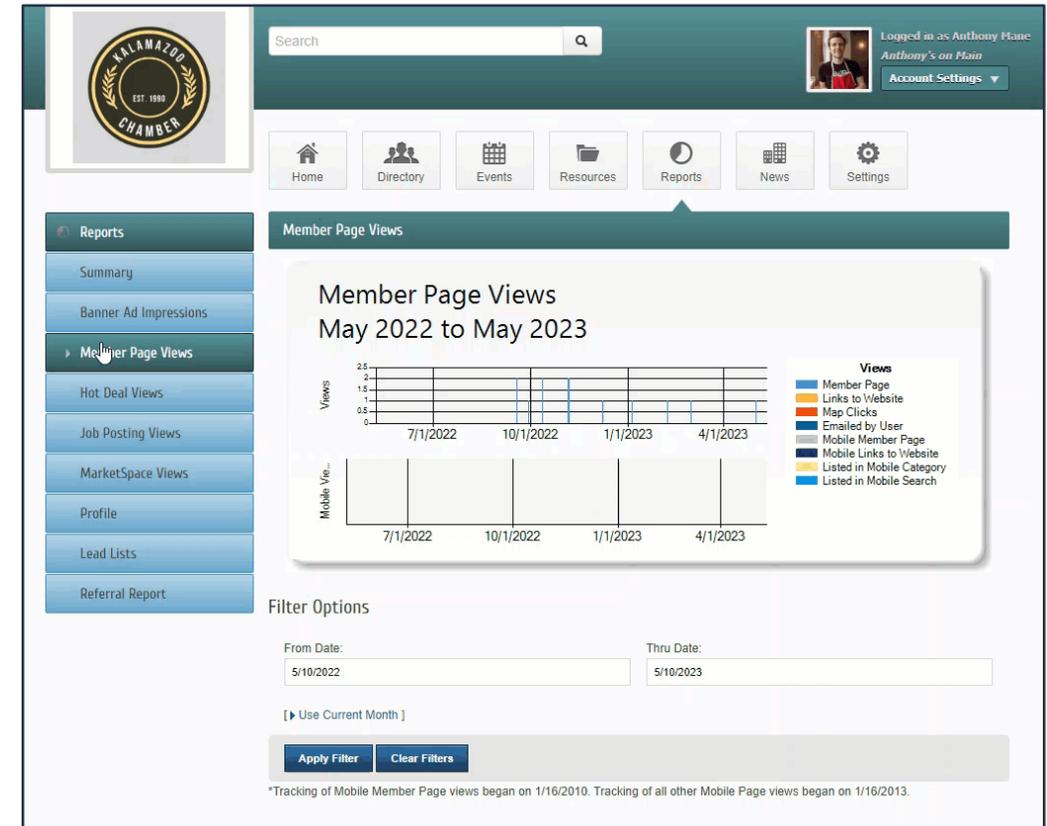
Resources

Search:  Show entries: 10

File Name	Category	File Type	Date Added	Action
Golf Event Video Video from our latest golf event!	Events		10/6/2022	<a href="#">Edit</a> <a href="#">X Delete</a>
Top Takeaways from the U.S. Chamber's 2023 State of American Business Address In this year's State of American Business keynote address, U.S. Chamber of Commerce President and CEO Suzanne P. <a href="#">full description --&gt;</a>	National Chamber News		1/13/2023	<a href="#">Edit</a> <a href="#">X Delete</a>
What is a Chamber of Commerce? A chamber of commerce is a group of businesses that supports the interests of its members. Each chamber of <a href="#">full description --&gt;</a>	Association Information		10/6/2022	<a href="#">Edit</a> <a href="#">X Delete</a>

# Reports in MIC

- Real-time statistics
- Members independently access
- Summary and detail views
  - Broken down by Views
- KB: Web Statistics Terminology



# News in MIC

- Includes Hot Deals, Member-to-Member Deals, Job Postings, [News Releases](#), MarketSpace, and Requests for Proposals
- Members can add and manage within MIC
  - Can allow public to submit Job Postings for approval
- KB: [Working with Job Postings/Hot Deals/Member-to-Member Deals](#)

The screenshot displays the Kalamazoo Area Chamber Member Information Center (MIC) dashboard. At the top left is the Kalamazoo Area Chamber logo. To its right is a search bar and a user profile section showing 'Logged in as Elizabeth Diepho' with an 'Account Settings' dropdown. Below the search bar is a navigation menu with icons for Home, Directory, Events, Resources, Reports, News, and Settings. The main content area is divided into several sections: 'Community' (with a sub-menu for Hot Deals, Member-to-Member Deals, Job Postings, MarketSpace, Social Feed, and Request for Proposals), 'Community Content', 'Hot Deals' (with 2 items), 'Member-to-Member Deals' (with 0 items), 'Job Postings' (with 2 items), 'MarketSpace Items' (with 2 items), and 'Requests for Proposal' (with 0 items).

# MIC Initial Setup

- Customize member login area in Setup module
  - Change [Welcome Message](#), [menu options](#), and modules available
  - Allow Member-to-Member Reviews, Requests for Proposals, and more
- KB: [Member Information Center Setup](#)

**Menu Items & Permissions**  
Set the maximum permissions allowed in the Member Information Center, enable/disable selections, and add custom menu choices for your members. ⓘ Manage individual representative permission sets here.

<b>Find</b>	<b>Advertising</b>
Enabled <input type="checkbox"/> Find	Enabled <input type="checkbox"/> Hot Deals
Linked <input type="checkbox"/> Display All Members' Emails	Enabled <input type="checkbox"/> Auto-Approve Hot Deals
Enabled <input type="checkbox"/> Allow Member Details Copy/Paste	Enabled <input type="checkbox"/> MarketSpace
	Enabled <input type="checkbox"/> Job Postings
<b>Member Info</b>	Enabled <input type="checkbox"/> Events
Enabled <input type="checkbox"/> Pay Bills Online	Enabled <input type="checkbox"/> News Releases
Enabled <input type="checkbox"/> Business Info	Enabled <input type="checkbox"/> Display Upgrade Messages
Read Only <input type="checkbox"/> Bus. Categories	
Read/Write <input type="checkbox"/> Employees/Reps	<b>Reports</b>
Enabled <input type="checkbox"/> Login/Password	Enabled <input type="checkbox"/> Banner Ad Impressions
	Enabled <input type="checkbox"/> Member Page Views
<b>Webpage Info</b>	Enabled <input type="checkbox"/> Hot Deal Views
Enabled <input type="checkbox"/> Webpage Info	Enabled <input type="checkbox"/> Job Posting Views
Enabled <input type="checkbox"/> Map Pin Info	Enabled <input type="checkbox"/> MarketSpace Views
Enabled <input type="checkbox"/> Photos & Logos	Enabled <input type="checkbox"/> Profile
Enabled <input type="checkbox"/> Search Results Icon	Enabled <input type="checkbox"/> Lead Lists
Enabled <input type="checkbox"/> Keywords	Enabled <input type="checkbox"/> Referral Report
Enabled <input type="checkbox"/> Links	
Enabled <input type="checkbox"/> View Homepage	<b>User Manuals</b>
	Enabled <input type="checkbox"/> Help and User Manuals
<b>Lodging</b>	
Disabled <input type="checkbox"/> Vacancies	
Disabled <input type="checkbox"/> Facility Info	
Disabled <input type="checkbox"/> Room Info	

# MIC Messages

- Promote Your Business and Upgrade Your Listing messages
  - Provides details of what Enhanced Package includes
  - Encourages members to upgrade
- KB: Promote Your Business & Upgrade Your Listing Messages

The screenshot displays the ChamberMaster website interface. At the top, there is a search bar and a user profile for Gabby Thomas, logged in as Gabby's Dry Cleaning. Below this is a navigation menu with icons for Home, Directory, Events, Resources, News, and Settings. The main content area is divided into several sections:

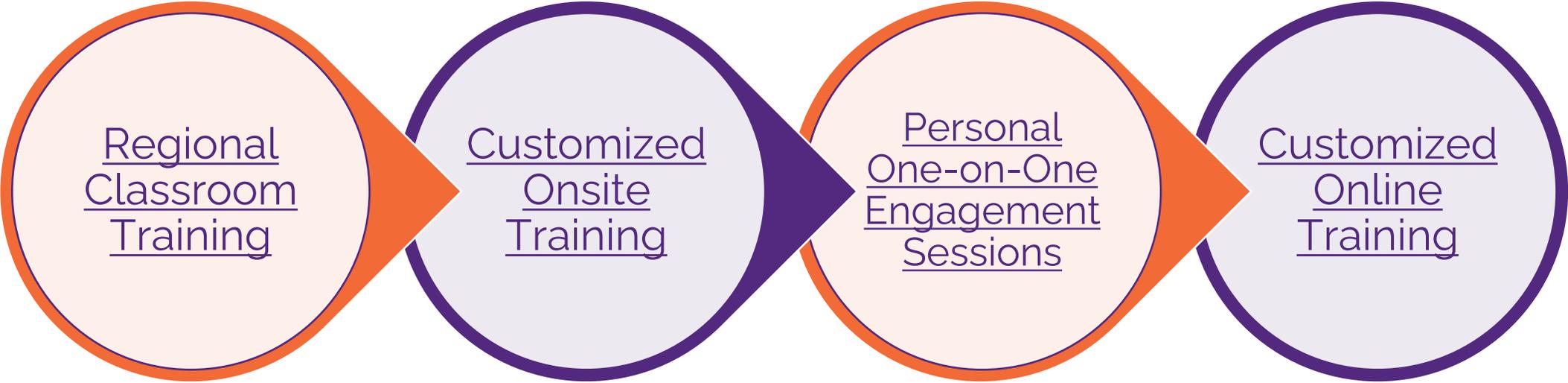
- Shortcuts:** Personal Information, Company Information, Hot Deals, Member-to-Member Deals, Job Postings, Request for Proposals.
- Links:** MIC How To's, Chamber Useful Links, New & Exciting Opportunities!
- Welcome Message:** ChamberMaster is your direct connection to the Kalamazoo Area Chamber. As a member of the Kalamazoo Area Chamber, you have the opportunity to market your business to consumers visiting your website by enhancing your informational home page with pictures and text. You can also post hot deals, job openings, and events, and add keywords to help consumers find you when they run searches and reports to see hit statistics for your home page and other advertised items. A blue circular stamp with the text "MEMBERS ONLY" is overlaid on this message.
- Upcoming Events:** 15 FEBRUARY 2023. Weekly Trivia Night. Trivia Night at Bell's Brewery! REGISTER NOW.
- Member Profile:** Your Company Profile is 35%. VIEW.
- Promotional Message:** Whether at work, home, or traveling, anywhere you have access to the internet you will be able to edit your information by logging into the ChamberMaster website. Please contact your Kalamazoo Area Chamber representative if you have any questions regarding this site. Support LOCAL Businesses.
- Enhance your listing! For more information, please contact info@kalamazoochamber.com or (269) 555-5555. Promote your Business.** (This section is highlighted with a red border in the image.)
- Refer a Business for Membership:** Refer others to the Kalamazoo

# Training Resources



# Expanded Training Offerings

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# Questions?