ChamberMaster/ MemberZone Solution Overview



Agenda

- Where to get help
 - <u>Support Portal</u>
 - <u>Knowledge Base</u>
- Module overviews
 - Members
 - Groups
 - Communication
 - Events
 - Billing
 - Reports





Overview

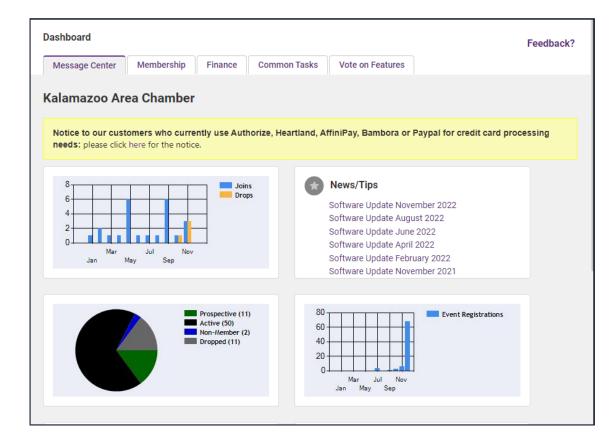
- Web-based software designed for chambers, associations, and other member-based organizations
 - Acquire new members
 - Retain/engage existing organizations/individuals
 - Do more with less time

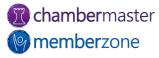




Database/Staff View

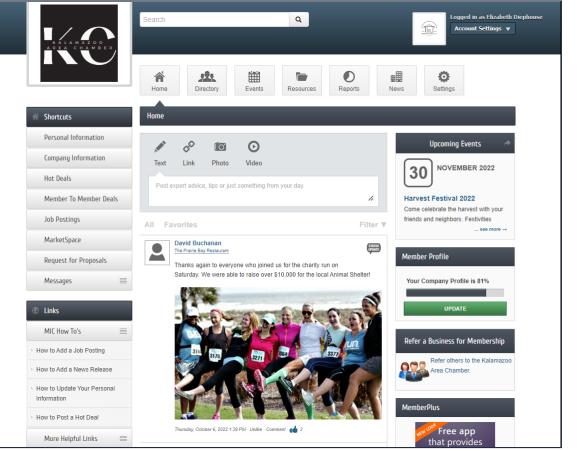
- Manage all contacts
 and members
- Manage events
- Generate and analyze reports
- Additional modules provided





Member View – MIC

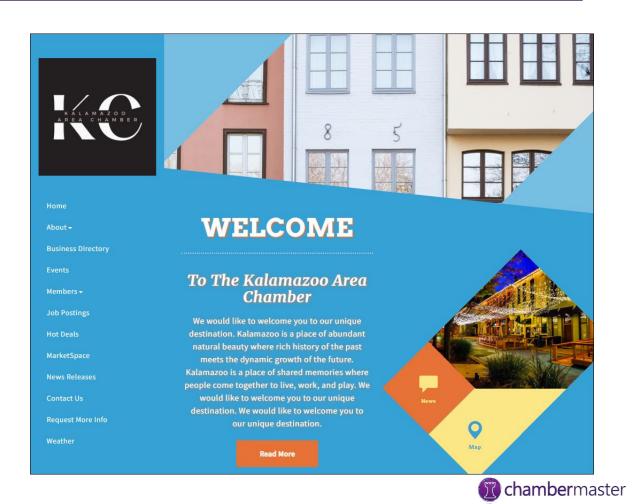
- <u>Update</u> their own information (photos, directory listing, website, etc.)
- Manage their account
- Pay their bills
- Register for <u>events</u>
- Enter <u>Hot Deals</u>, Member-to-Member deals, job postings, etc.
- KB: <u>Member Information</u> <u>Center (MIC)</u>





Public View

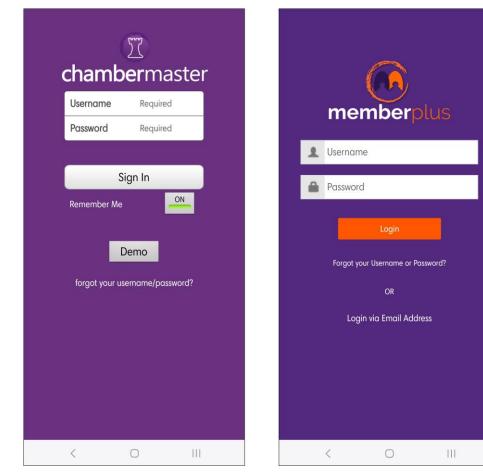
- Web Modules integrated to public website
 - Member Directory
 - Event Calendar
 - Deals
 - Job Postings
- Any updates to database automatically published to public view
- KB: <u>Website Modules</u>



memberzone

Apps

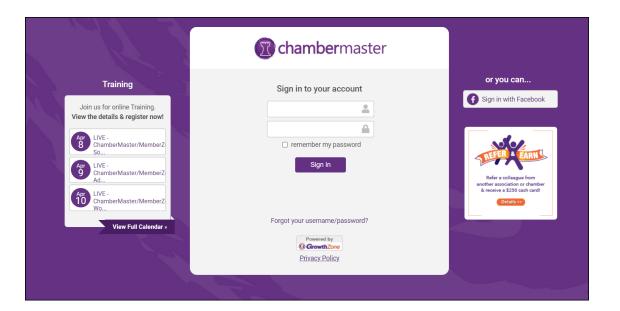
- <u>StaffApp</u>
 - <u>Add</u> Prospects
 - <u>Check-in</u> attendees to event
 - <u>Send</u> communications
 - <u>View</u> reminders
 - <u>eReferrals</u>
- <u>MemberPlus App</u>
 - <u>Update</u> profile
 - View job postings and deals
 - <u>Access</u> Directory





Access to Software

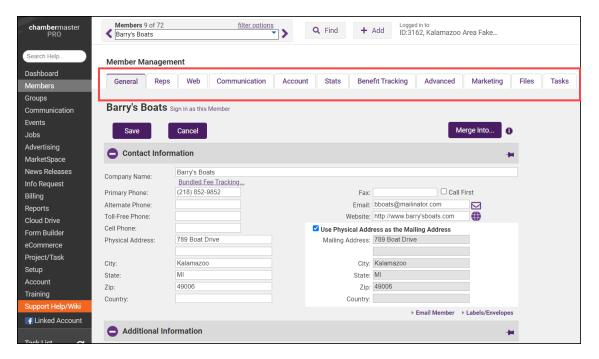
- Web-based software
 - Available anywhere you have access to the internet
 - Firefox, Chrome, and Safari supported web browsers
- No downloading required
- Onboarding Team assists with login
 - Use admin credentials to add staff members





Members

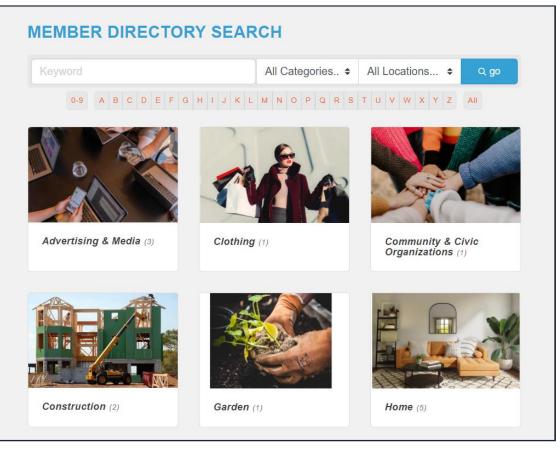
- Manage your <u>members</u> you'll spend a lot of time in this module
 - Update Contact
 Information
 - Directory Information
 - Representatives
 - Billing
- KB: <u>Member Management</u>





Member Web Module

- Member information entered in back office displayed on your website in member directory link
- Allows consumer ability to search member database
- Displays member information
- KB: Directory Overview





Groups

- Create Groups for quick and convenient mass communication
- Can allow <u>public</u> (nonmembers) and <u>members</u> to sign up for Groups
 - Members can manage via MIC
- <u>Group Types</u>
- KB: <u>Groups</u>

Groups	
Home General	Roster Fees Sync Files
2024 Board of D	irectors
Group Information	
Group Name:	2024 Board of Directors
Group Type:	
Status:	Enabled
Description:	
Date Group Formed:	
Member Options:	
	Allow members to view/search this group in Member Information Center. 🕕
	Allow members to join/leave this group within the Member Information Center.
	Display in this section:
	Group Participation list O Rep Interest list
Public Options:	O Rep Interest list
	Allow the public to view this group roster at /groups/GroupRoster/2024-board-of-directors-71 Public page display settings
	Allow the public to join/leave this group at /communication ()
Additional Options:	······································
	Display this group name on the Email Subscriptions opt-in/out page. 🚯
Z	Disable ability to opt-out from this groups' emails. (also overrides prior email opt-outs) 🚯
	Synch this group with Constant Contact. 🕕
Group Members:	<u>8 members</u>
Outlook Email Alias:	2024-board-of-directors
Save Changes C	Contact Members Cancel



Group Web Module

- Link displaying designated groups for <u>viewing on your</u> <u>website</u>, giving the members name, title, etc.
- Show committee and board member lists to public
 - Including photos
- KB: <u>Create a Group or</u> <u>Mailing List</u>





Communication

- Send <u>mass emails</u>, <u>letters</u>, faxes, etc.
 - <u>Merge fields</u> easily personalize <u>communication</u>
- Review communication history
- Create and use form letters, <u>templates</u>, etc.
- <u>Schedule Emails</u>
- Send <u>eReferrals</u>
- Log Notes
- <u>Push notifications</u> and <u>SmartText</u>

Dear Anthony's On Main,

Do you have a job vacancy that must be filled right away?

Are you looking for talented new employees?

Do you want to reach a broader employee pool from outside our area?

Submit your job openings now in the Member Information Center by logging in at http://kalamazoo/login. While you are there, take a moment to check out the following:

- **Deals** offer coupons and special deals; fellow members may be your best customers! When you are done posting your deal, go shopping and encourage your employees to regularly check for member-only specials.
- Advertise events add your events to our online event calendar displayed with quick links; use these links to share on your social media, text to mobile devices, add to your calendar, or email others.
- Network with other members check out other member listings, jobs, and deals.

Log in today at <u>http://kalamazoo/login</u> to gain access to all of these features, update your information, and more. Don't know your login? Enter your email address to be sent a reminder at <u>http://kalamazoo/login/forgotpwd</u> Please contact us with questions or for more information.

Sincerely, Kalamazoo Area Chamber 1903 W. Michigan Ave. (123) 456-7890 kalamazoo@mailinator.com Check out our website!





Events

- Complete events
 management solution
 - Manage <u>guest list</u>
 - Send invitations
 - Track <u>registrations</u>
 - Add <u>sponsors</u>
 - Create invoices
 - <u>Publish</u> event
- KB: <u>Events</u>

Events								
Calendar General	Fees Sponsors Advanced Guest List Account Files Tasks							
Harvest Festival 202								
Save Cancel Preview Event Page Delete Event								
Title:	Harvest Festival 2023							
Time Zone:	(GMT-06:00) Central Time Show/Select from all time zones							
Start Date/Time:	9/29/2023 9 🗸 : 00 🗸 AM 🗸 🗌 All Day Event							
End Date/Time:	10/1/2023 8 ♥ : 00 ♥ PM ♥ ▶ same as start date							
Reminder Date/Time:	Send automatic <u>reminder</u> to all registered attendees							
Recurrence:	None 🗸 🕄							
Approval Status:	Approved 🗸 Professional Development Hours:							
Display Status:	Approved Continuing Education Units:							
Limit Attendee Count To:	400 (current attendee count: 0) 🚯							
Enable waiting list:								
Limit Attendees per Registration:	θ							



Events Web Modules

- Online Events <u>calendar</u> link
- Allow online registration
- Customizable event <u>categories</u>
- <u>Reminder</u> email option
- Allow public <u>submission</u> of events (optional)
- KB: <u>Events</u>



HARVEST FESTIVAL 2023

Come celebrate the harvest with your friends and neighbors! We have a great lineup of activities this year including:

-Artisans will demonstrate fine wood burning, wool spinning, wood carving, and decorative autumn book stacking.

- -A pumpkin pie-eating contest -Parade of Halloween Hounds is to be co-hosted by the local bakery
- and animal shelter.
- -Michigan Wine & Craft Brew tastings
- -A cornhole tournament.
- -There will be a tag and bake sale.

Images





Harvest Festival 2023

Register »

Set a Reminder

Date and Time
 Friday Sep 29, 2023 Sunday Oct 1, 2023

Thursday 9.00AM.



Hot Deals and Job Postings

- Added benefit for your members
- Published on your website
- <u>Hot Deals</u>, <u>Member-to-</u> <u>Member Deals</u>, and <u>Job</u> <u>Postings</u>
- Requires Standard edition or greater

► Large 2 Topping Pizza & 2 Pops \$19.99
 ○ Offer Valid: 12/01/2022 - 02/28/2023



Enjoy our famous pizza along with free delivery.





Anthony's on Main © 5000 Portage Road, Kalamazoo, MI 49007 ~ 867-5309

Wisit Website

This Hot Deal is promoted by Kalamazoo Area Chamber.

Business Directory / News Releases / Events Calendar / Hot Deals / Member To Member Deals / Marketspace / Job Postings / Contact Us / Information & Brochures / Weather / Join The Chamber



Job Posting Web Module

- Job posting link that searches the database for available jobs posted by member businesses
- Add images and links
- Reach broad employee
 pool
- Revenue for <u>posting jobs</u> on your website
- KB: <u>Job Postings</u>

+

Seeking Landscaping Professional <

Dested: 10/29/2022 Skilled and Trades

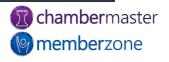
Responsibilities:

- Operates lawn maintenance and snow removal equipment
- Provides lawn maintenance and snow removal services to commercial properties
- Prepare truck, equipment, and materials needed for the day
- Communicate with the crew leader frequently to provide service issues
- Work alongside other crew members



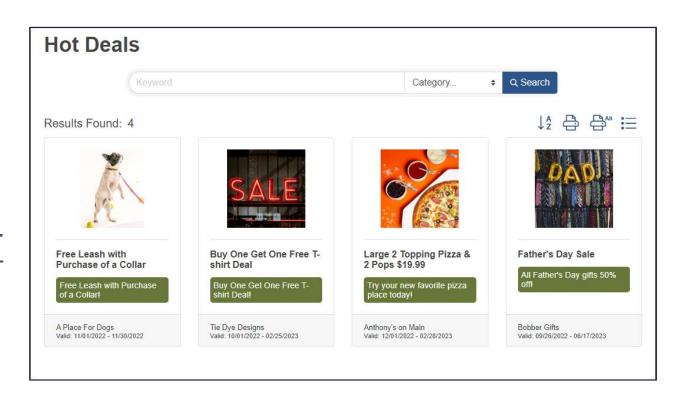






Hot Deals Web Module

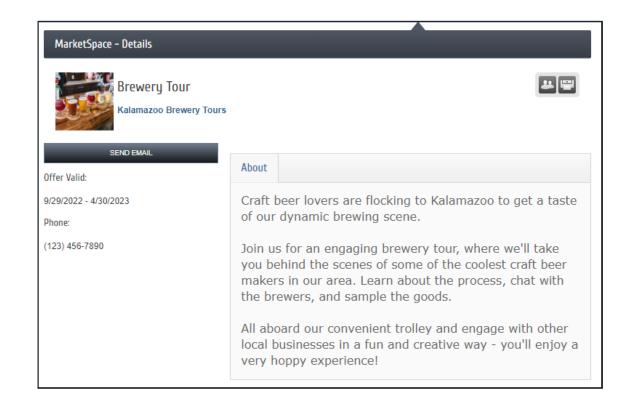
- Offer coupons and special deals
 - Fellow members can be your best customers!
- Hot Deals <u>eNewsletter</u>
- KB: <u>Hot Deals</u>
- Requires Plus edition or greater





MarketSpace

- Designed to market items, specials, or other offerings to members and/or community
 - Classified ads
 - Auction items
 - Real estate listings
- Area <u>specific</u> deals
 - College student discounts
 - Military discounts
- KB: <u>MarketSpace</u>





Marketspace Web Module

- Great for marketing miscellaneous items
- Space for rent
- Military discounts
- Student coupons, etc.



News Releases

- <u>Publish</u> press releases, event summaries, and business news to website and/or MIC
- <u>Approve</u> submissions by members via MIC
- KB: News Releases
- Requires Plus edition or greater

"Kalamazoo's Best Companies to Work For" Winners Announced! 🖮 October 01, 2022 🔊 Awards, Community, Chamber, Human Interest An independent research firm evaluates nominees based on key measures in

categories such as compensation and benefits, employee education and development, communication, diversity, work-life balance, and more.





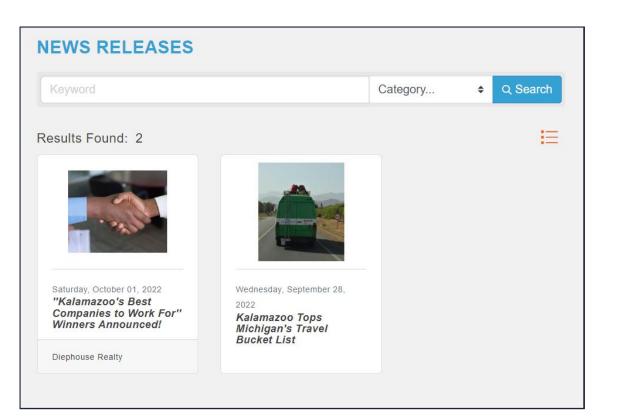
Diephouse Realty Sarah Samuels CFO 🛱 October 01, 2022 \$ (123) 456-7890 @ Send Email



<

News Releases Web Module

- Link for displaying news articles via public website
- Allow members to submit News Releases for approval via MIC
- KB: <u>Approve News</u> <u>Release Submitted by</u> <u>Member</u>





Info Request

- Internally <u>enter</u> consumer information requests
- <u>Manage</u> consumer requests
 - Distribute publications
- Utilize <u>Lead Management</u> to distribute leads to members
- Info Request <u>reporting</u>

Information & Publication Request									
Areas o	Areas of Interest								
Please sp	Please specify which of the following you are interested in:								
Select all t	that apply								
	ation 🗌 Visitor Information/Tourism								
Places	s to Stay 🛛 Restaurants								
🗆 Venue	us l								
Publicat	ions								
The follow	ving publications and brochures are available:								
Select any	r items that you would like to receive								
Email	269 Things to Do in Kalamazoo Two-hundred-sixty-nine is not just the area code for Kalamazoo County. It is also the starting number of unique, off-the-map activities that people can explore in southwest Michigan!	(269)							
🗆 Email	Kalamazoo County Map Kalamazoo County is located in the heart of the Great Lakes region, midway between Chicago and Detroit.	Kalamazoo County Map							
Email	Kalamazoo Dining Guide Foodies and beverage lovers alike, rejoice in Kalamazoo. We?re a city full of eclectic tastes and traditional favorites that will satisfy every craving and every taste palate.	DINING GUIDE							



Info Request - Web Module

- Consumers request specific information
- Digital publications automatically delivered
- Requests for printed literature queued for <u>distribution</u>
 - Mailing labels
 - Inventory updated automatically
- Solicit pertinent marketing information
- KB: Info Request Setup

Publications

The following publications and brochures are available:

Select any items that you would like to receive

□ Email 269 Things to Do in Kalamazoo

Two-hundred-sixty-nine is not just the area code for Kalamazoo County. It is also the starting number of unique, off-the-map activities that people can explore in southwest Michigan!

Email Kalamazoo County Map

Kalamazoo County is located in the heart of the Great Lakes region, midway between Chicago and Detroit.

Email Kalamazoo Dining Guide

Foodies and beverage lovers alike, rejoice in Kalamazoo. We?re a city full of eclectic tastes and traditional favorites that will satisfy every craving and every taste palate.



(269)



Reports

- Numerous pre-defined reports
 - Designed to help organization run more efficiently
 - Use as-is or customize to meet organization's needs
- Create your own <u>custom</u>
 <u>reports</u>
 - Utilize Advanced Custom <u>Report Builder</u>
- KB: <u>Reports</u>

Q Find + Add Logged in to: ID:3162, Kalar	nazoo Area Fake	Ô		₿	۲	A	MIC	C
Reports							Feedba	ick?
	our organization more efficiently. Search for a re Or build your own custom reports using the Adv Reports					· ·		
Search by Keyword	Found 3							
Search by Category Popular / Frequently Used Recent Featured	Custom Member Report Allows creation of a custom me fields/columns, sorting, criteria	, etc.	hip rep	ort. Se	lect yo	ur own		Solution
Recently Added Membership	Allows creation of a custom rep fields/columns, sorting, criteria		ative re	eport. S	Select	our ov	vn	
Advertising Billing Events Information Request No Destings	Mailing Labels Generates mailing labels for me	embers	or the	r repre	sentat	ives	•	
 Job Postings Website Statistics Quickbooks Sales Member Marketing Executive Dashboards 								



Billing

- Use Integrated Billing as your billing solution
- Manage all receivables for memberships, events, etc.
- Options to <u>export</u> a file for import to accounting software
- KB: Billing

Member Name	Balance	Member Information								
A Plus Painting	0.00	Company Name: <u>Diephouse Realty</u> Primary Phone: (123) 456-7890 Fax Number: Email Address: mwest@maillnator.com Chamber Rep: Andrew Lewis Member Type: Nisswa Billing Contact: <u>Nicklas Lidström</u> - Manager			Mbr Status: Active					
A+ Security & Repair	4095.16									
ABC Heating & Cooling	-4.16					Join Date: 9/1/2022 Drop Date:				
Ace Hardware	5840.40					Full-Time: 10				
Andiamos Italian Restaurant	0.00				Part-Time	Part-Time: 5				
Anthony's on Main	-676.25	1903 W. Michigan								
Back to Basics Wellness C	1056.17	8.17 New Invoice New Sales Receipt New Payment New Credit Apply Credit								
Ballet Kalamazoo	4903.17									
Barry's Boats	5015.75									
Bayside Painting Company	392.97									
Beautiful Home Interior De	963.00									
Big Foot Shoe Shop	317.49	Transaction Date: 4/8/2023 to more Refresh								
Black Diamond Advertising	2386.85	Don't filter dates								
Bobber Gifts	1148.31		Billing Trans	actions (76 tota	l transactions)					
Cakes by Katie	0.00	Type	Ref #	Invoice #	Date	Amount	Balance			
Car Dealership	475.00	INVOICE	<u>1822</u>	<u>1822</u>	4/4/2024	250.00	250.00			
Clearview Window Repair	792.49	INVOICE	<u>1847</u>	<u>1847</u>	4/4/2024	18.33	18.33			
Crystal Clear Window Was	2250.00	INVOICE	<u>1792</u>	<u>1792</u>	4/1/2024	18.33	18.33			
Dana's Fashion Boutique	18819.50	PAYMENT	VISA*4242	<u>1531</u>	4/1/2024	250.00	0.00			
Diephouse Realty	2373.32	PAYMENT	123	<u>1571</u>	3/13/2024	250.00	0.00			
Diephouse Really										



Cloud Drive

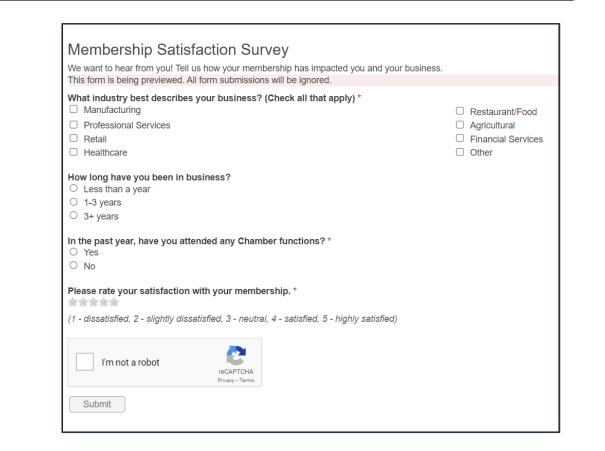
- Personal Files
- Staff Files
- Member Files
 - Members <u>access</u> the documents via the Member Information Center (MIC)
- Event Files
- Group Files
- KB: <u>Storing Documents in the</u> <u>Cloud</u>
- Requires Plus edition or greater

Cloud Drive							
My Documents Shared	Documents	Email Images	Email Attachments	Member F	iles	Event Files	Group Files
Genera	l Task Files						
My Documents ① The files in these folders				t u	Jpload	New folde	ir III 🗐
[Private: My Documents]	Name		۵	Dimensions		Modified	
5-Benefits-of-GZ-Pay-Ha	A D-Bene	fits-of-GZ-Pay-Hanc		1.57mb	2023-01-0	3T10:15:53-0	
CM-MZ-Administrative-S	D CM MT	-Administrative-Setu	ıp-Handout.pdf		625.35k	b 2023-01-0	3T10:15:54-0
CM-MZ-Daily-Billing-Act	- C	-Billing-Setup-Hand	out.pdf		830.82k	b 2023-01-0	3T10:15:55-0
CM-MZ-Event-Manageme CM-MZ-Event-Setup-Har	L CM-M7	-Daily-Billing-Activit	ies-Handout.pdf		1.45mb	2023-01-0	3T10:15:56-0
CM-MZ-Golf-Tournamen		-Event-Management	-Handout.pdf		824.07k	b 2023-01-0	3T10:15:57-0
CM-MZ-Member-Admini		-Event-Setup-Hando	ut.pdf		920.69k	b 2023-01-0	3T10:15:58-0
CM-MZ-Member-Informa	D CM M3	-Golf-Tournament-H	landout.pdf		1.09mb	2023-01-0	3T10:15:59-0
CM-MZ-Solution-Overvie		-Member-Administra	ation-Handout.pdf		667.66k	b 2023-01-0	3T10:16:00-0
CM-MZ-Working-with-Co	L CM-M/	-Member-Informatio	n-Center-Handout.pdf		783.31k	b 2023-01-0	3T10:16:01-0
		-Member-Manageme	ent-Handout.pdf		774.54k	b 2023-01-0	3T10:16:01-0
	🔎 СМ-МZ	-Solution-Overview-	Handout.pdf		2.65mb	2023-01-0	3T10:16:04-0
	🔎 СМ-МZ	-Working-with-Com	munications-Handout.pdf		741.53k	b 2023-01-0	3T10:16:05-0
	CM-MZ	-Working-with-Grou	ps-Handout.pdf		1.14mb	2023-01-0	3T10:16:07-0



Form Builder

- Quickly create and publish custom web forms and surveys
 - Event follow-ups
 - Continuing Education interest surveys
 - Member satisfaction, etc.
- KB: Form Builder
- Requires Pro edition or greater





eCommerce

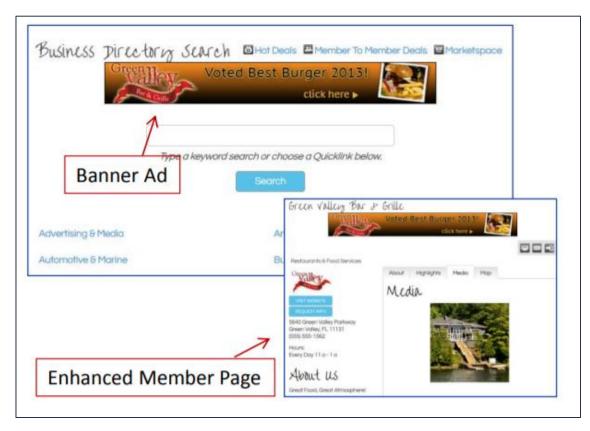
- Can <u>sell</u> items online to your members or general public
 - Including <u>downloadable</u> products
- Available by Request
 - <u>Contact Support</u> to enable
- KB: <u>eCommerce</u>
- Requires Plus edition or greater





Marketing Package

- Sell <u>enhanced</u> member listings and banner ads on your association website
 - Post member Banner Ads on website
 - Enhance a member's Online Directory listing
 - Earn non-dues revenue
- Banner Ad <u>widget</u>
- KB: <u>Marketing Package</u>
- Requires Premium edition or greater





Additional Web Modules

- "Contact Us" link
 - Collect contact information and brief comments/questions
- Member Information Center
 (MIC) login link
 - Allow members to login to MIC directly from your website
- KB: <u>Website Modules</u>

CONTACT US

Send us your questions or comments using the form below. We will respond promptly to your inquiry.

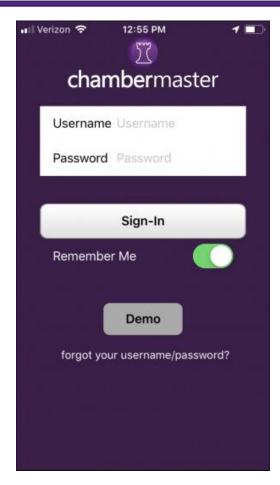
Contact Information

* Required field Name *			
Joe Smith			I Please fill out this field.
Organization			
Company, Inc.			
Mailing Address		Mailing Address	line 2
123 Example Stree	et	Suite 900	
City	State	Postal Code	Country
Orlando	MN	54321	United States ~



StaffApp

- Mobile companion for staff
- Access database anywhere
- Provides real-time membership information
- <u>Manage</u> members
- Communicate with members
 - <u>Call</u>
 - <u>Community Feed</u>
 - <u>Email</u>
- <u>Point of Sale</u> module
- <u>Check-in</u> event attendees
- KB: <u>StaffApp</u>





MemberPlus App

- Free mobile app available to all members
- Receive <u>notifications</u> from your organization
- <u>View</u> member listings
- <u>Update</u> their own profile information
- Register, pay and check-in for <u>events</u>
- Interact with other members
- KB: <u>MemberPlus App</u>



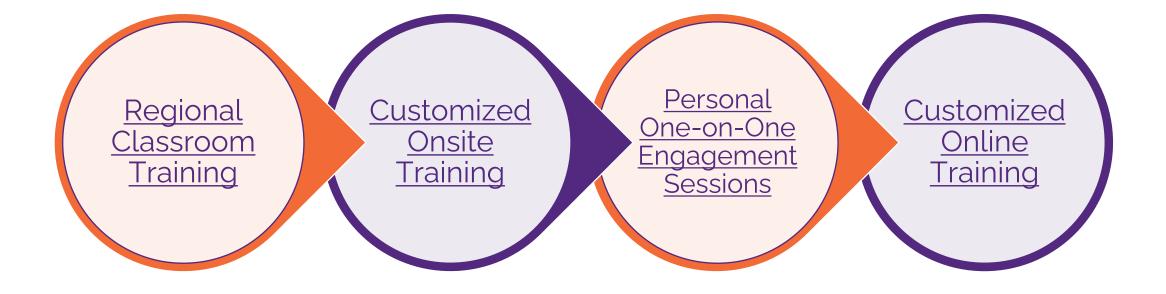


Training Resources





Expanded Training Offerings





Questions?

