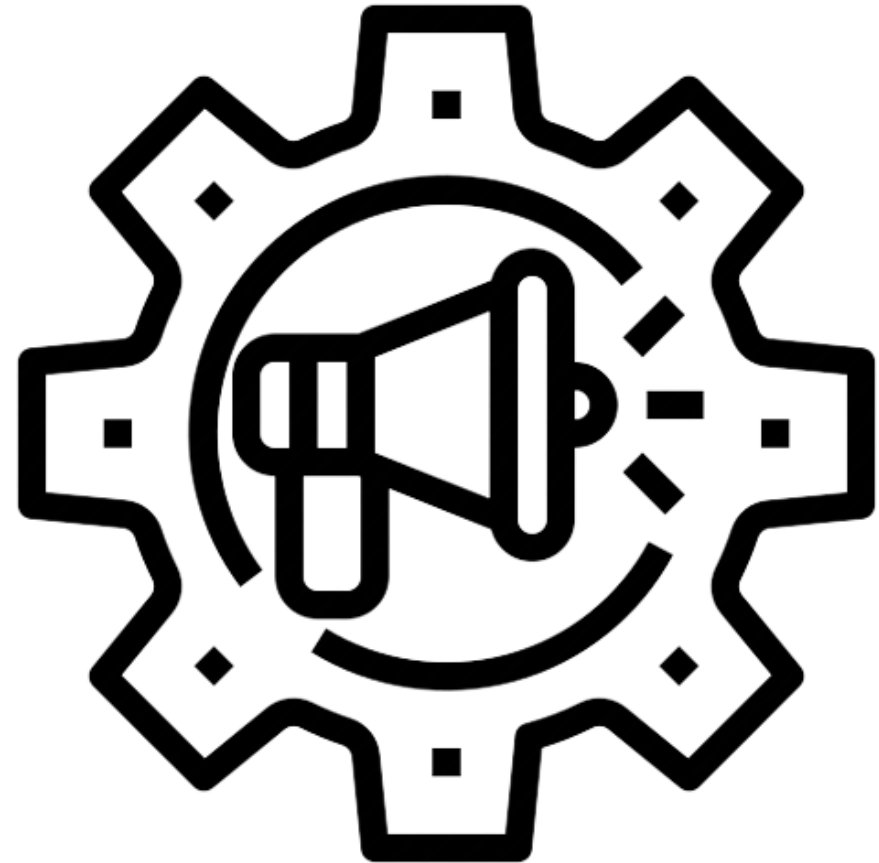


ChamberMaster/ MemberZone Member Information Center

Agenda

- Overview of Member Information Center (MIC)
- MIC Initial Setup (Admin)
- Setup Member Rep Permission Levels (Admin)
- Managing Users Names/Passwords
 - Custom Rep Report
 - Verify Reps have Login Credentials



Member Information Center (MIC)

- Members can:
 - 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, and Job Postings
 - Submit jobs, advertising, and events for approval

The screenshot displays the Kalamazoo Area Chamber Member Information Center (MIC) dashboard. At the top, there is a search bar and a user profile for Elizabeth Diephouse with an 'Account Settings' dropdown. Below this is a navigation menu with icons for Home, Directory, Events, Resources, Reports, News, and Settings. The main content area is divided into several sections:

- Shortcuts:** A vertical list of buttons for Personal Information, Company Information, Hot Deals, Member To Member Deals, News Releases, Job Postings, MarketSpace, and Request for Proposals.
- Links:** A section titled 'MIC How To's' with links for 'How to Add a Job Posting', 'How to Add a News Release', and 'How to Update Your Personal Information'.
- Welcome Message:** A central message box with a 'Read Later' button. The text reads: '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.' Below the message is the ChamberMaster logo and a 'Support LOCAL Businesses' graphic.
- Upcoming Events:** A section for '14 APRIL 2023' featuring the '2023 Golf Tournament' with a 'Join us for the Kalamazoo Area Chamber's 24th Annual Golf' and a 'see more' link.
- Member Profile:** A section showing 'Your Company Profile is 81%' with a progress bar and an 'UPDATE' button.
- Refer a Business for Membership:** A section with the text 'Refer others to the Kalamazoo Area Chamber.' and a small image of three people.

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.

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

MIC Rep Permissions

- Permission Sets allow you to limit the access the reps will have to the Member Information Center (MIC)
- Several Permission Sets predefined
 - Can edit or add new Permission Sets
- KB: Set Rep Log-in Permissions

Manage Permission Sets

Permission Sets	Reps	Del
Primary	163	
Billing	11	
Standard	115	
Prospect	391	
GV Marketing Set	1	x

[New Permission Set](#)

Permission Set Name:

<input checked="" type="checkbox"/> Allow Login To MIC	<input checked="" type="checkbox"/> Advertising
<input checked="" type="checkbox"/> Allow Event Registrations	<input type="text" value="Read/Wri"/> Hot Deals
<input checked="" type="checkbox"/> Find Members	<input type="text" value="Read/Wri"/> Job Postings
<input type="text" value="Disabled"/> Find Members	<input type="text" value="Read/Wri"/> Events
<input checked="" type="checkbox"/> Member Info	<input type="text" value="Read/Wri"/> News Releases
<input type="text" value="Read/Wri"/> View/Pay Own Bills	<input checked="" type="checkbox"/> Reports
<input type="text" value="Read/Wri"/> View/Pay All Bills	<input type="text" value="Enabled"/> Banner Ad Impressions
<input type="text" value="Read/Wri"/> Business Info	<input type="text" value="Enabled"/> Member Page Views
<input type="text" value="Disabled"/> Bus. Categories	<input type="text" value="Enabled"/> Hot Deal Views
<input type="text" value="Read/Wri"/> Employees/Reps	<input type="text" value="Enabled"/> Job Views
<input type="text" value="Read/Wri"/> Individual Profile	<input type="text" value="Enabled"/> Profile
<input type="text" value="Read/Wri"/> Login/Password	

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

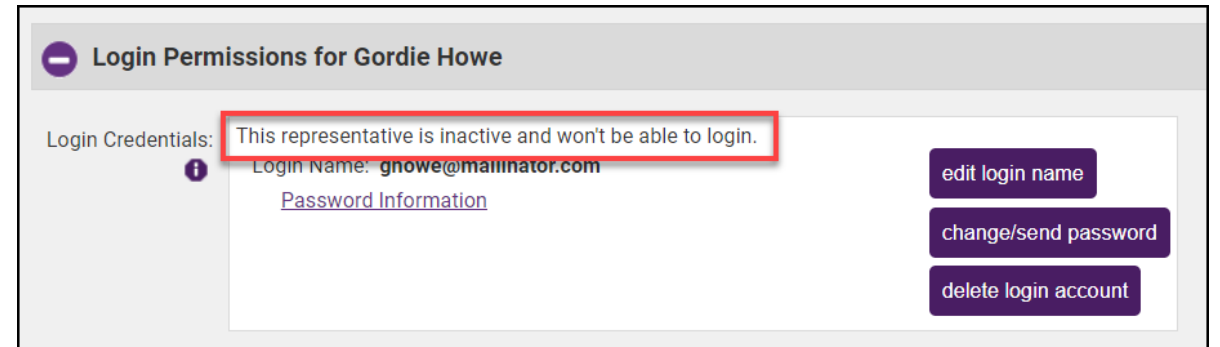
Login Credentials: [How come I can't see the password? Watch overview video or view slides](#)
(ID #1425) Betty Jones can create his/her own personal login and password.
Create their login right now or send them an invitation that lets them create their own.

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
- 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

- 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
- KB: Custom Representative Report

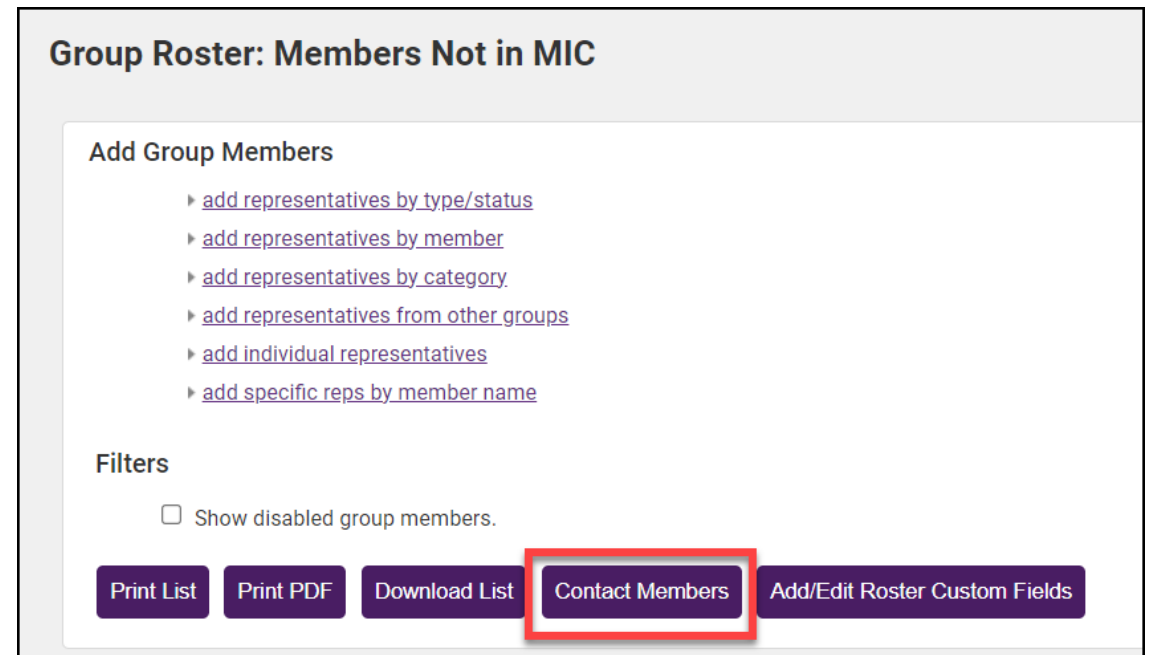
Filter using Additional Criteria:

Criteria				
	Field Name	Operator	Value	
	Rep Login Name ▾	IsEmpty ▾		remove
AND ▾	Select a field ▾	EqualsExactly ▾		remove
AND ▾	Select a field ▾	EqualsExactly ▾		remove

▸ [Add Criteria](#)

Send Login Instructions Email

- Send mass email to group with instructions on creating logins
 - Use Create Login Account Invitation template
- Send to rep's email address, not member's
- KB: Send Group Email



Group Roster: Members Not in MIC

Add Group Members

- ▶ [add representatives by type/status](#)
- ▶ [add representatives by member](#)
- ▶ [add representatives by category](#)
- ▶ [add representatives from other groups](#)
- ▶ [add individual representatives](#)
- ▶ [add specific reps by member name](#)

Filters

Show disabled group members.

Print List Print PDF Download List **Contact Members** Add/Edit Roster Custom Fields

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	LIVE ChamberMaster/MemberZone: Solution Overview 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?