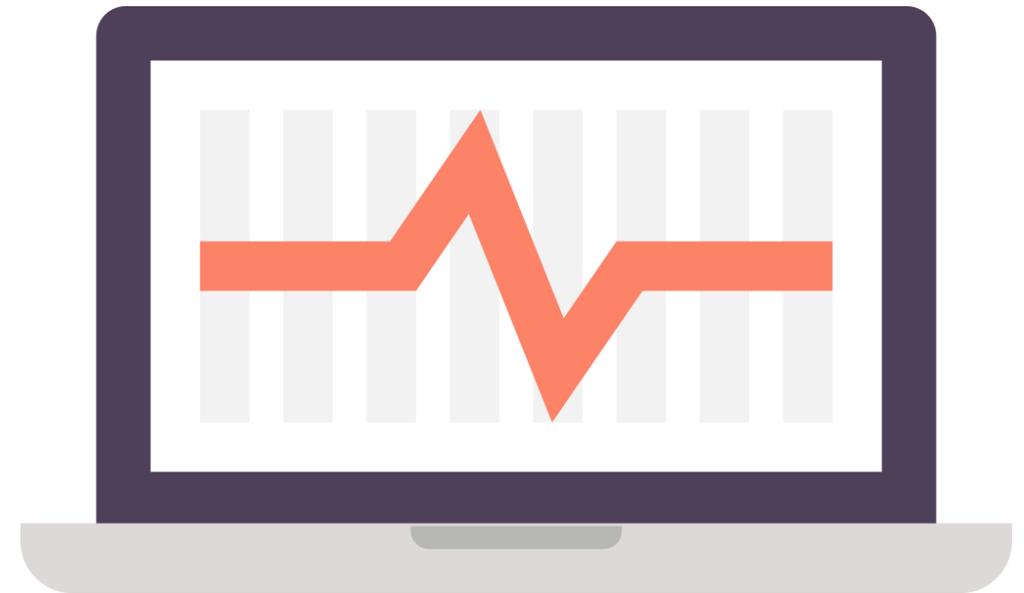


Essential Member Management Tools in ChamberMaster/ MemberZone

Agenda

- Create Member record
- Custom Fields
- Add Reps to Member Record
 - Access to MIC
- Member Web Display Options
- Drop Members
- Reinstate Members
- Merge Members and Reps
 - Check for duplicates routinely



Add New Member

- Add member via simple process with Setup Wizard
- Company Name only required field
 - Useful when adding Prospects
- Best Practice: complete as many fields as known

The screenshot shows a web-based form titled "Add a New Member". At the top, there is a progress indicator with four steps: "Step 1: Basic Information" (selected), "Step 2: Additional Information", "Step 3: Billing Information", and "Step 4: Web Display Information". Below this, the "General Information" section contains several input fields. On the left, there are fields for "Company Name", "Primary Phone", "Alternate Phone", "Toll-Free Phone", "Cell Phone", "Physical Address" (with a multi-line input), "City" (pre-filled with "Nisswa"), "State" (pre-filled with "Minnesota"), "Zip" (pre-filled with "56468"), and "Country". On the right, there are fields for "Fax", "Email", and "Website" (with a globe icon). A checkbox labeled "Use Physical Address as the Mailing Address" is checked, and below it are corresponding "Mailing Address" fields for "City", "State", "Zip", and "Country", all pre-filled with the same information as the physical address section. At the bottom of the form, there are four buttons: "<< Back", "Next >>", "Finish", and "Cancel".

Custom Fields

- Ultimate flexibility in managing your data
 - Track information unique to your association
- Creates database field available across all member records
- Run reports using this custom data
- KB: Custom Fields

Custom Field Information

Kalamazoo Area Chamber

Member

Drag rows to change the display order of the fields.

Custom Fields

Field Name	Field Type	Field Size	MIC Search	Member Permission	<input type="checkbox"/>
General					
Reason for Joining	Select	edit items	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Referred by	Text	50	<input type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Would you like a ribbon	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Would you like to volun	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Would you serve on the	Select	edit items	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Are you willing to host a	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Business District	Select	edit items	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Number of Employees	Select	edit items	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Women Owned?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Veteran Owned?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Minority Owned?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Why did you join?	Text	50	<input type="checkbox"/>	Disabled	<input type="checkbox"/>

▸ Add A Field ▸ Add A Section Heading ▸ Remove Selected Fields

Add Reps

- Representatives related to member are managed on the Reps tab
 - Personal Information
 - Custom Fields
 - Display preferences for public website and MIC
 - Groups and mailing lists
 - Login Permissions

List of Representatives [filter options](#)

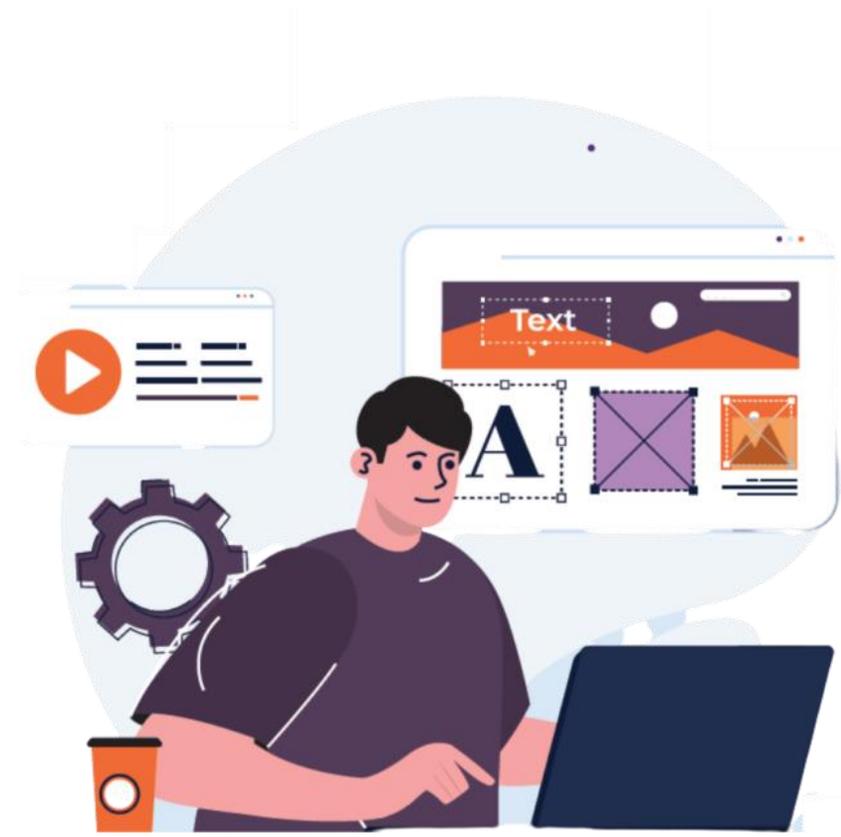
entries 1 - 5 of 5 Display 100 results per page.

Member Representatives						
check all clear all	Rep Name	Title	Status	Type	Phone	Email
<input type="checkbox"/>	Gordie Howe		Inactive		(123) 456-7890	ghowe@mailinator.com
<input type="checkbox"/>	Sarah Samuels	CFO	Active	Billing	(123) 456-7890	ssamuels@mailinator.com
<input type="checkbox"/>	Brendan Shanahan	Executive	Active		(123) 456-7890	bshanahan@mailinator.com
<input type="checkbox"/>	Mary West	Owner	Active	Primary	(123) 456-7890	mwest@mailinator.com
<input type="checkbox"/>	Steve Yzerman		Active		(123) 456-7890	YZeMan@mailinator.com

[Send Email](#) [Labels/Envelopes](#) [Reassign Selected Reps](#) [Remove/Inactivate Reps](#) [Merge Selected Rep](#) [Add a New Rep](#)

Rep Login Setup

- Send [invitation](#) to create login to MIC
 - Email template provided
- Manage [permissions](#)
- Manage login [credentials](#)
 - Edit login name
 - [Reset password](#)
 - Delete account
- [Create login](#) via MIC login screen



Add a Prospective Member

- Use the same Setup Wizard provided for adding members
 - Choose Prospect as status
- Add prospect after an event via Guest List
- Prospective Sales Pipeline
 - Report forecasts new member revenue
- KB: Add a Prospective Member

Add a New Member

Step 1: Basic Information
▶ Step 2: **Additional Information**
Step 3: Billing Information
Step 4: Web Display Information

Business Information

File-By Name: Frollicles Hair Salon

Status: Active (dropdown menu)
Member Type: Active (dropdown menu)
Web-Participation: Non-Member (dropdown menu)
Sales Rep: Prospective (dropdown menu, highlighted with a red arrow)
Dropped/Inactive (dropdown menu)

Join Date: []

Full-Time Emps: 0
Part-Time Emps: 0

Comment/Notes: []

Categories: Primary Directory Category Name
▶ Assign Categories

Representatives: Primary Representative Name
▶ Add a New Rep

<< Back Next >> Finish Cancel

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: Assign Recurring Membership Fees

Membership Fees & Dues

Membership Fees & Dues
Drag fees in the order you want them to appear on the invoices when you run invoice batches and click "Save".

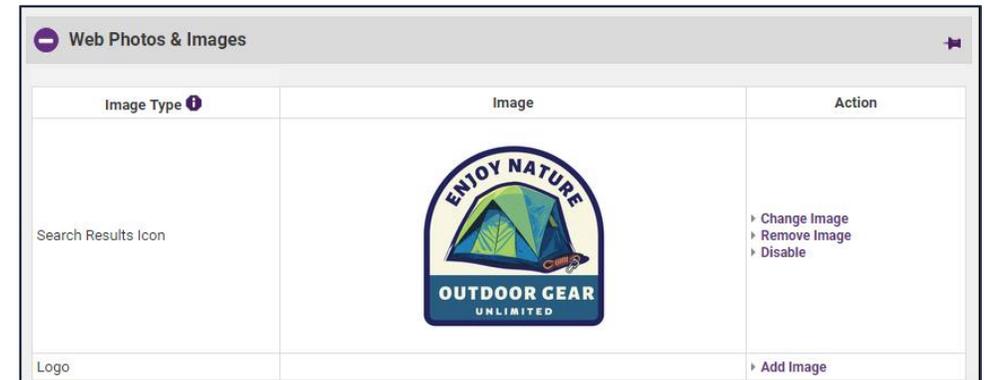
Name	Bill-To Override	Description	Qty	Frequency	Next Billed*	Amount**	<input type="checkbox"/>
Silver Membership - New (Membership Dues)		Membership dues for new Silver Membership.	1	Annually	Sep 2023	\$1200.00	<input type="checkbox"/>

[Assign Fee Items](#) [Remove Selected Items](#)

*Next Billed is a reminder of the month this fee should be billed. It does not indicate whether the fee has been billed or not. It will automatically reset to the next date after the 1st of each month.
The annual amount due is listed in the **Amount column for recurring dues and fee items.

Add Web Information

- Information and settings related to member's online [directory](#) listing
- Changes/updates automatically reflected in online directory
- Member may also modify these items [via the MIC](#)
 - [Permissions](#) required
- [Web Display Participation Options](#)
 - [Enhanced](#) or [Basic](#)



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
- Run reports based on drop information
- KB: Drop a Member

Drop Member Options

Demonstration Company

Drop Date: Drop Reason:

Drop Details:

Representatives

Contact Name	Title	Rep Status ?	Group Status ?
All Member Representatives			
Paul Demo		Set as Inactive	Leave Unchanged

Billing Information

Current Balance: \$5000.00

Recurring Membership Dues & Fees

<input type="checkbox"/>	Name	Description	Quantity	Frequency	Amount*
<input type="checkbox"/>	Full Membership	1-year membership (often used after a prorated year)	1	Annually	\$2448.00
<input type="checkbox"/>	Membership Dues	2019 Membership Dues	1	Annually	\$124.00
<input type="checkbox"/>	Prorated Membership	first year membership, prorated	1	Annually	\$1400.00

[Remove Selected Fee Items](#)

Reinstate Dropped Member

- Reinstate member by changing Membership Status back to Active
 - Will display options to return reps back to active status and reinstate their group participation if desired
- Redirect Index
- Member login permissions automatically reenabled

Activate Member
Bayside Painting Company

Representatives		
Contact Name	Rep Status ?	Group Status ?
All Member Representatives		
Dan Smith	Inactive	Leave Unchanged
Jane Smith	Inactive	Leave Unchanged

Member Page and Login Settings

The following options have been set:

- The **Disable Login** option has been cleared.
- The **Redirect Index** has been set to "No Redirect Action".

Display Attributes:

<input type="checkbox"/> Do Not Display On Web	<input type="checkbox"/> Disable Login	<input type="checkbox"/> No Web Link on Member Page
<input type="checkbox"/> Cannot Purchase Ads/HotDeals	<input type="checkbox"/> Disable Member Info Page	<input type="checkbox"/> Hide Social Networks

Redirect Index: No Redirect Action

Save and Exit Cancel

Merge Member/Rep Records

- Check for duplicate members/ reps using Custom Member Report
 - Use Excel functionality to locate duplicates
- Easily manage duplicate members in your database
 - Ex: Perhaps you had added a prospect, then the prospect applied online
- Merge older member or rep into newer contact
 - Best Practice

Member - Merge

Floral Design

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.

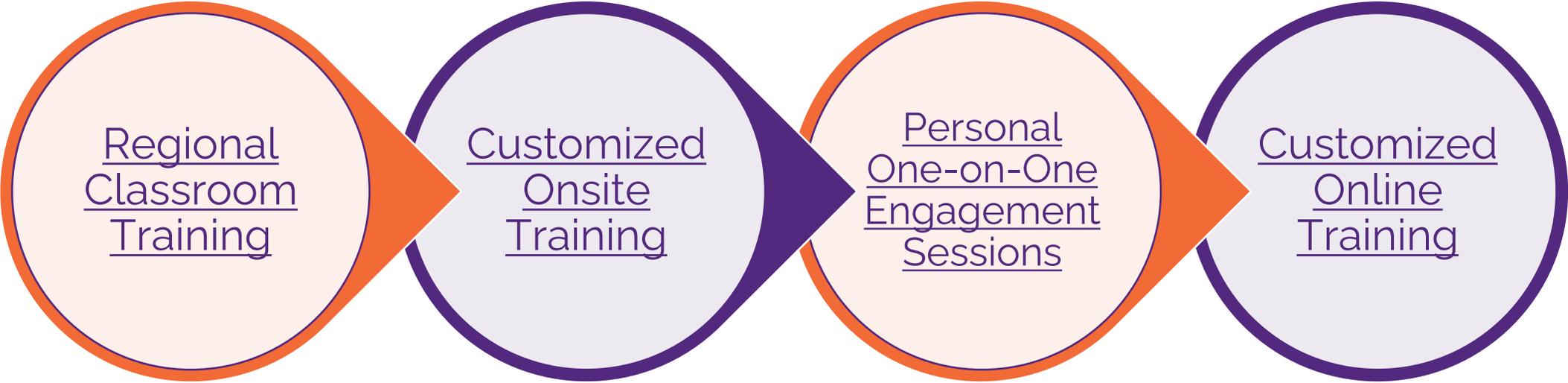
After the merge is complete, please review Reps, Account, Advanced, and Marketing tabs to disable or delete any duplicate information if necessary.

Field	Source Record Floral Design (Created: 5/16/2017):	Destination Record Flowery Branch Farm (Created: 10/25/2017):	New Destination Record 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 Fields			
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 Fields			
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			

Training Resources



Expanded Training Offerings



Questions?