

# Essential Admin Tools for ChamberMaster & MemberZone

# Agenda

- Adjust [Browser Settings](#)
- Update [Organization Information](#)
- Manage Employees and Staff
  - [Add Staff](#)
  - [Inactivate Staff](#)
  - [Reactivate Staff](#)
- Manage Business Categories
  - [Directory Quick Links](#)
- [Membership Types](#)



# Adjusting Your Browser Settings

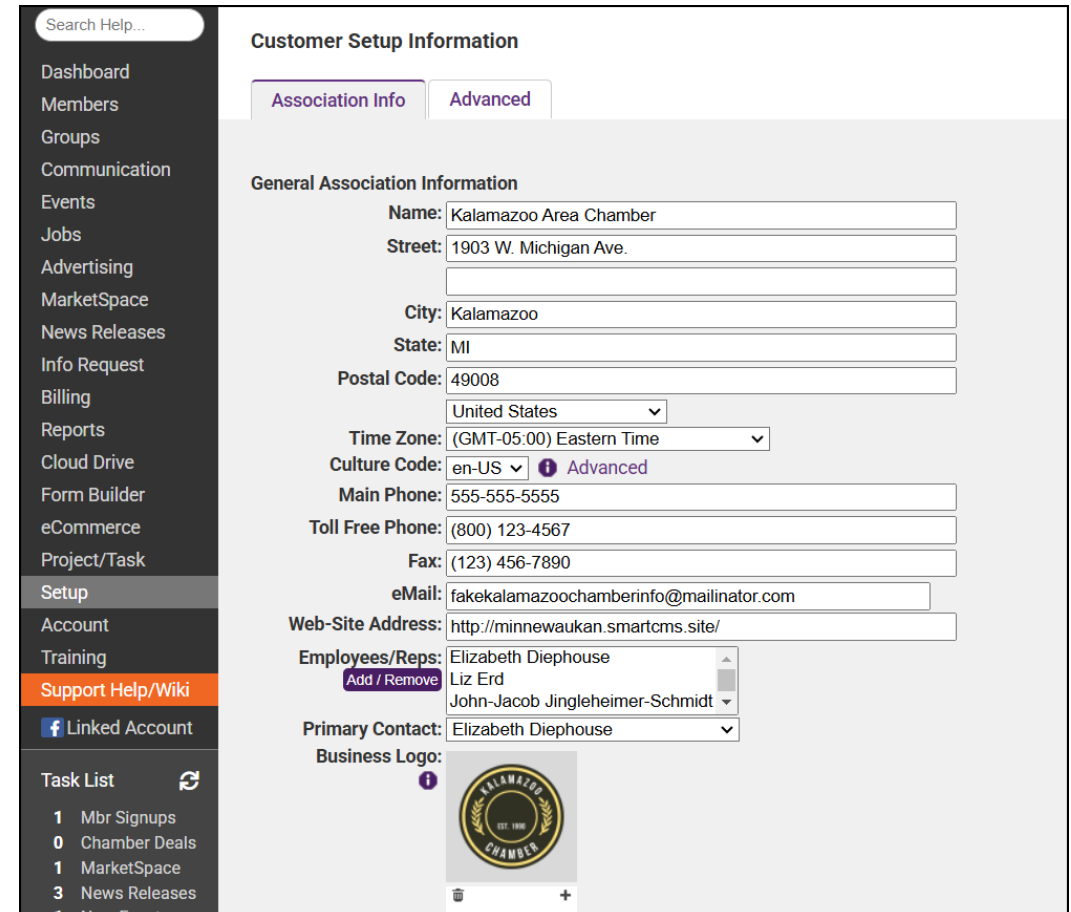
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- Configuration changes to web browser may be required during first use
  - Ex: Disable pop-up blocker or clearing [cache](#)
- Only need to be done once
  - Check again if updates made to web browser, pop-up blocker software or operating system
- KB: [Configuring Your Web Browser](#)



# Updating Organization Information

- General Association Information
  - Contact Information
  - Logo
  - Culture code
- Initial Setup
- KB: Setup Organization Information



The screenshot shows the 'Customer Setup Information' page in the Chambermaster system. The left sidebar contains a navigation menu with options like Dashboard, Members, Groups, Communication, Events, Jobs, Advertising, MarketSpace, News Releases, Info Request, Billing, Reports, Cloud Drive, Form Builder, eCommerce, Project/Task, Setup, Account, Training, Support Help/Wiki (highlighted), and Linked Account. Below this is a 'Task List' section. The main content area is titled 'Customer Setup Information' and has two tabs: 'Association Info' (selected) and 'Advanced'. Under the 'Association Info' tab, there is a section for 'General Association Information' with various input fields. The fields are filled with the following information: Name: Kalamazoo Area Chamber, Street: 1903 W. Michigan Ave., City: Kalamazoo, State: MI, Postal Code: 49008, United States (selected in a dropdown), Time Zone: (GMT-05:00) Eastern Time, Culture Code: en-US (with an 'Advanced' link), Main Phone: 555-555-5555, Toll Free Phone: (800) 123-4567, Fax: (123) 456-7890, eMail: fakekalamazoochamberinfo@mailinator.com, Web-Site Address: http://minnewaukan.smartcms.site/, Employees/Reps: Elizabeth Diephouse, Liz Erd, John-Jacob Jingleheimer-Schmidt (with an 'Add / Remove' button), Primary Contact: Elizabeth Diephouse, and Business Logo: a circular logo for the Kalamazoo Area Chamber.


Search Help...

Dashboard  
Members  
Groups  
Communication  
Events  
Jobs  
Advertising  
MarketSpace  
News Releases  
Info Request  
Billing  
Reports  
Cloud Drive  
Form Builder  
eCommerce  
Project/Task  
Setup  
Account  
Training  
Support Help/Wiki  
f Linked Account  
Task List  
1 Mbr Signups  
0 Chamber Deals  
1 MarketSpace  
3 News Releases  
1 New Events

Customer Setup Information

Association Info Advanced

General Association Information

Name: Kalamazoo Area Chamber  
Street: 1903 W. Michigan Ave.  
City: Kalamazoo  
State: MI  
Postal Code: 49008  
United States  
Time Zone: (GMT-05:00) Eastern Time  
Culture Code: en-US Advanced  
Main Phone: 555-555-5555  
Toll Free Phone: (800) 123-4567  
Fax: (123) 456-7890  
eMail: fakekalamazoochamberinfo@mailinator.com  
Web-Site Address: http://minnewaukan.smartcms.site/  
Employees/Reps: Elizabeth Diephouse  
Liz Erd  
John-Jacob Jingleheimer-Schmidt  
Add / Remove  
Primary Contact: Elizabeth Diephouse  
Business Logo: 

# Setting Up Your Staff

- Support provides initial login name for single staff person
  - Create additional logins
  - Inactivate staff
  - Reactivate staff
- Manage permission levels of staff
  - Staff login permissions

Organization Management

Kalamazoo Area Chamber

– List of Representatives [filter options](#)

entries 1 - 8 of 8

	Association Representatives			
<a href="#">check all</a> <a href="#">clear all</a>	Rep Name	Status	Title	Email
<input type="checkbox"/>	<a href="#">Sandra Dee</a>	Active		<a href="mailto:sandrad@mailinator.com">sandrad@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Elizabeth Diephouse</a>	Active	Owner	<a href="mailto:ediephouse@mailinator.com">ediephouse@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Anna East</a>	Active	Marketing Director	<a href="mailto:annaeast@mailinator.com">annaeast@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Claire Fraiser</a>	Inactive	Executive Financial Officer	<a href="mailto:clairefraiser@mailinator.com">clairefraiser@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Brenda French</a>	Inactive		<a href="mailto:brendafr@mailinator.com">brendafr@mailinator.com</a>
<input type="checkbox"/>	<a href="#">John-Jacob Jingleheimer-Schmidt</a>	Active	Membership Director	<a href="mailto:jjjs@mailinator.com">jjjs@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Andrew Lewis</a>	Active	Chief Financial Officer	<a href="mailto:andylewis@mailinator.com">andylewis@mailinator.com</a>
<input checked="" type="checkbox"/>	<a href="#">Mary West</a>	Active	Chief Information Officer	<a href="mailto:mwest@mailinator.com">mwest@mailinator.com</a>

[Send Email](#) [Print Labels](#) [Remove/Inactivate Reps](#) [Add a New Rep](#)

# Add New Staff Member

- Login Name
- Password
- Database Permissions
- Email Notifications
- KB: 5 Ways Series for Chamber Staff

**Add a New Chamber Staff Member/Representative**

**Personal Information**

Prefix:  [edit prefixes](#) Greeting:

First Name:\*  Job Title:

Middle Name:  ☐ Primary Contact

Last Name:\*

Suffix:  [edit suffixes](#)

**Contact Information** [copy business information](#)

Contact Preference:\*  eMail Phone Preference:\*  Work Phone

Address:  1903 W. Michigan Ave. Work Phone:  555-555-5555

City/State/Zip:  Kalamazoo  MI  49008 Home Phone:

Country:  Cell Phone:

eMail:  kalamazoochamberinfo@mailinator Alt. Phone:

Fax:

Comments:

# Staff Permissions

- **Administrator:** all available rights in the software
  - Full access to all financial and setup areas
  - Able to add new database fields within the software screens
- **Finance:** all rights except ability to modify Setup selections
- **Standard User:** all rights except ability to modify Setup selections and access the QuickBooks or Billing menu
  - Still allow the ability to view invoice and payment activity on the members' account
- [Staff logins and permissions](#)

**Permissions for Elizabeth Diephouse**


Login Account: Login Name: **Elizabeth** [use email](#)  
Password: \*\*\*\* [edit password](#)


Database Permissions: ☒ Allow Elizabeth Diephouse to log in to the database  
Permissions: **Administrator** (dropdown menu showing Administrator, Finance, Standard User)

SmartCMS Permissions: ☒ Allow Elizabeth Diephouse to access the SmartCMS website(s) [minnewaukan.smartcms.site](#) [more](#)

# Staff Email Notifications

- Configure which staff/employees receive email notifications when certain triggers met
- Helpful for different roles
  - Ex: Membership Director, Marketing Dept., etc.
- KB: [Set Email Notifications](#)

 **Additional Settings for Sandra Dee**

**Email Notifications** 

☒

 New Member Application

☒

 Member Modified their Membership Info

☐

 Content (deal, job, event etc.) was submitted that may need approval

☐

 Referral of membership prospect suggested by a member

☒

 Member posted in the social feed

☐

 Member sent communication to another member

☐

 All Web Leads pending approval

☒

 New Representative Created

☐

 Representative Group/Interest Changed

☐

 Request for Proposal Submitted

☐

 "Unsubscribe All" was submitted by email recipient

☐

 Content (job,event) was submitted by the public that may need approval

☐

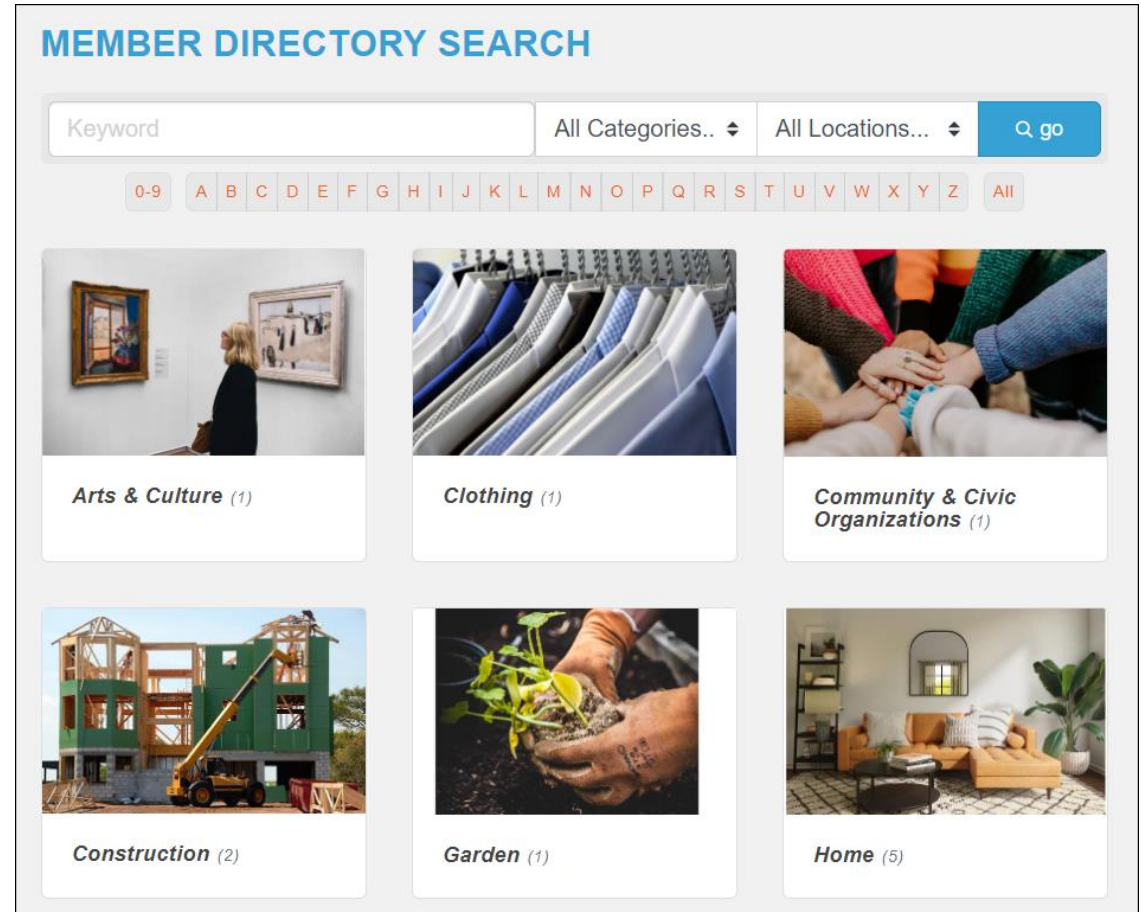
 Invalid Email Address Notifications

Save

Cancel

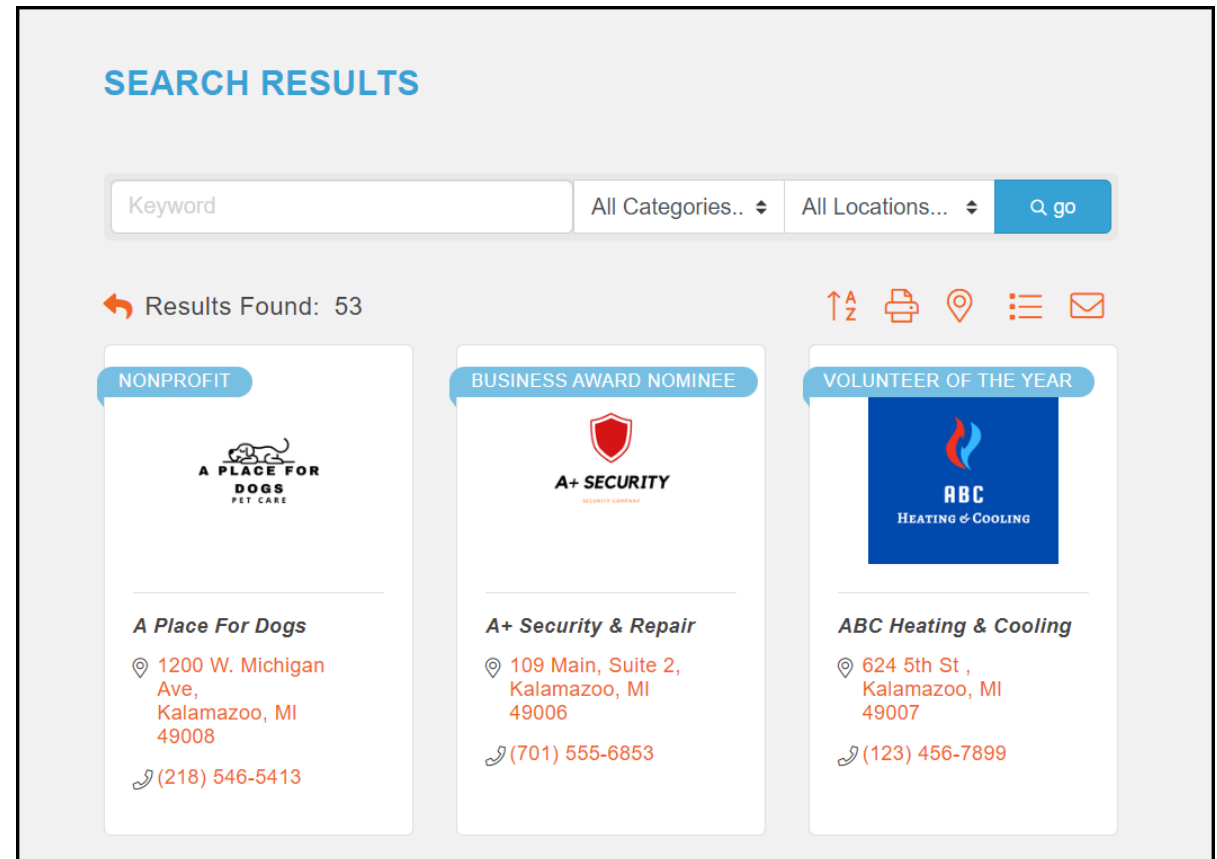
# Setting Up Directory Categories

- Directory Category
  - Indicates where members will be displayed within online directory
- Quick Links
  - Main categories within directory
  - Prepopulated with industry standard links
  - Customizable
  - Add images
- KB: Working with Directories



# Membership Types

- Customize Membership Types
  - Display options
- Common uses:
  - Reporting
  - Communication
  - Discounts
  - Grouping
- KB: Membership Types

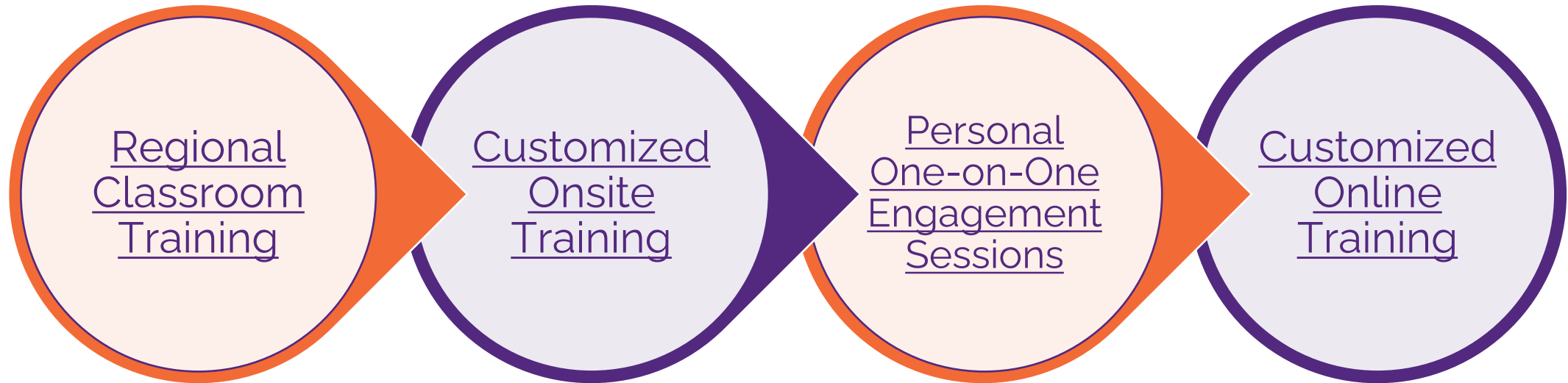


# Training Resources



# Expanded Training Offerings

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# Questions?