From Member Management to Reports: A Full CM/MZ Walkthrough



Agenda

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





Overview

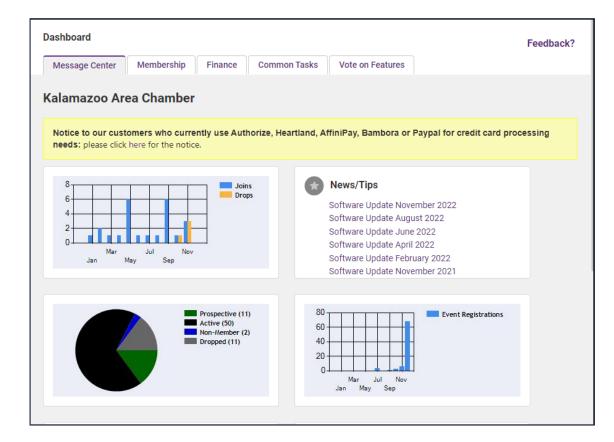
- Web-based software designed for chambers, associations, and other member-based organizations
 - Acquire new members
 - Retain/engage existing organizations/individuals
 - Do more with less time

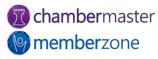




Database/Staff View

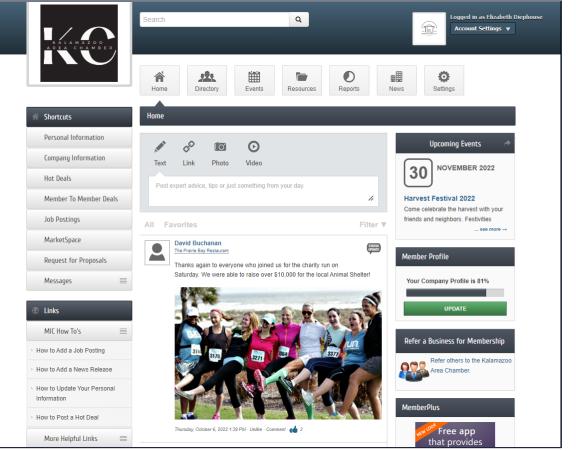
- Manage all contacts
 and members
- Manage events
- Generate and analyze reports
- Additional modules provided





Member View – MIC

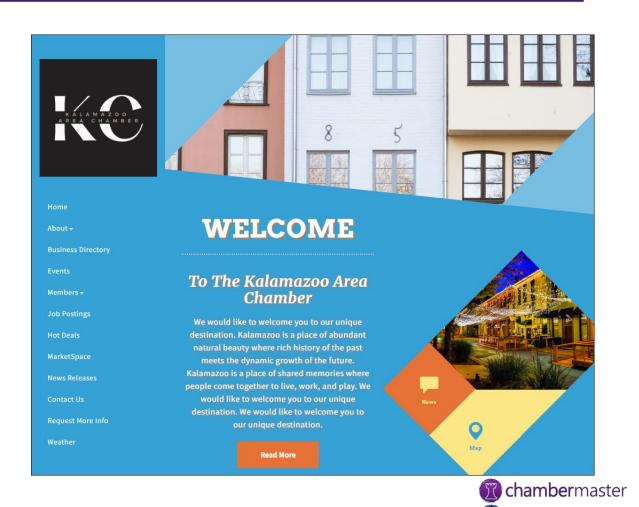
- <u>Update</u> their own information (photos, directory listing, website, etc.)
- Manage their account
- Pay their bills
- Register for <u>events</u>
- Enter <u>Hot Deals</u>, Member-to-Member deals, job postings, etc.
- KB: <u>Member Information</u> <u>Center (MIC)</u>





Public View

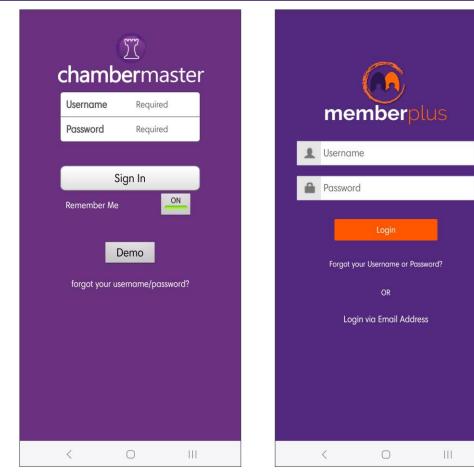
- Web Modules integrated to public website
 - Member Directory
 - Event Calendar
 - Deals
 - Job Postings
- Any updates to database automatically published to public view
- KB: <u>Website Modules</u>



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

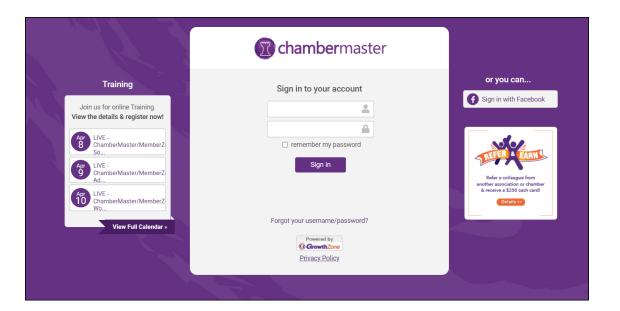




Access to Software

Web-based software

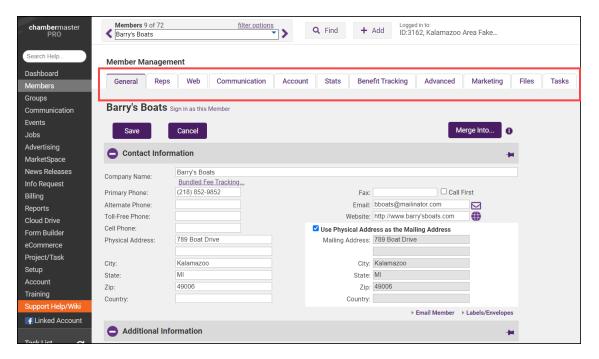
- Available anywhere you have access to the internet
- Firefox, Chrome, and Safari supported web browsers
- No downloading required
- Onboarding Team assists with login
 - Use admin credentials to add staff members





Members

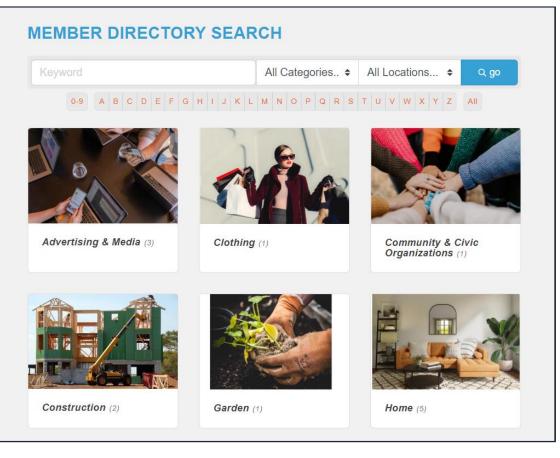
- Manage your <u>members</u> you'll spend a lot of time in this module
 - Update Contact
 Information
 - Directory Information
 - Representatives
 - Billing
- KB: <u>Member Management</u>





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:	Committee						
Status:	Enabled V						
Description:							
Date Group Formed:							
Member Options:	Allow members to view/search this group in Member Information Center. 🚯						
	Allow members to view/search this group within the Member Information Center.						
	Display in this section:						
	O group Participation list 🚯						
	O Rep Interest list 🕕						
Public Options:							
	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 <u>/communication</u> 🚺						
Additional Options:	Display this group name on the Email Subscriptions opt-in/out page. 🚯						
✓ Disable ability to opt-out from this groups' emails. (also overrides prior email opt-outs) 🕦 □ Synch this group with Constant Contact. 🕦							
Group Members:							
· · · · · · · · · · · · · · · · · · ·	2024-board-of-directors						
Save Changes	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 2023								
Save Cancel Preview Event Page Delete Event Center Event Information								
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 V 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:	0							



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





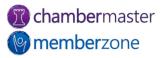
Harvest Festival 2023

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

Try your new favorite pizza place today!

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



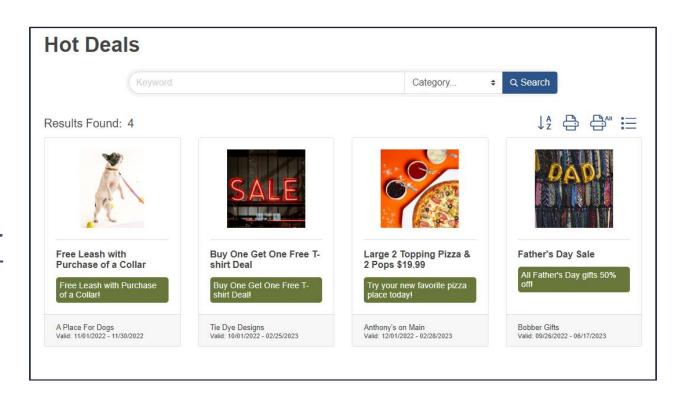






Hot Deals Web Module

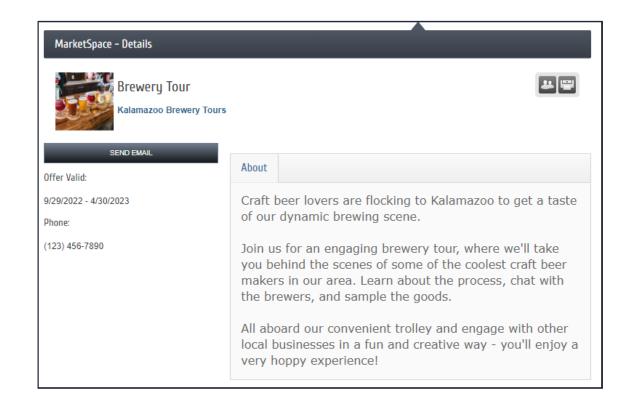
- Offer coupons and special deals
 - Fellow members can be your best customers!
- Hot Deals <u>eNewsletter</u>
- KB: <u>Hot Deals</u>
- Requires Plus edition or greater





MarketSpace

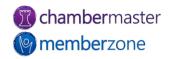
- Designed to market items, specials, or other offerings to members and/or community
 - Classified ads
 - Auction items
 - Real estate listings
- Area <u>specific</u> deals
 - College student discounts
 - Military discounts
- KB: <u>MarketSpace</u>





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 <u>by</u> members via MIC
- KB: <u>News Releases</u>
- Requires Plus edition or greater

"Kalamazoo's Best Companies to Work For" Winners Announced! © 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.



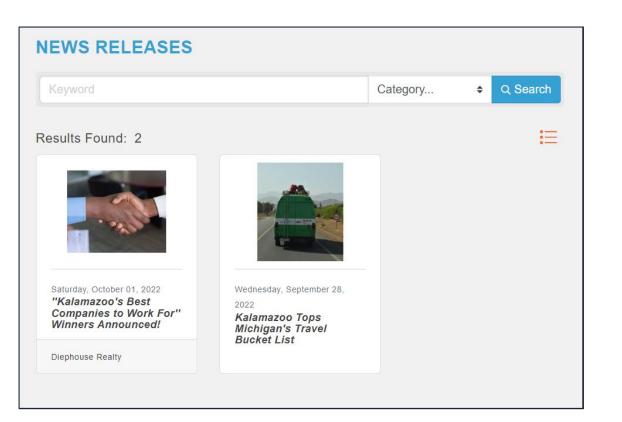




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News Releases Web Module

- 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>

In	form	ation & Publication Request	
Ar	eas o	fInterest	
	lect all t Reloca	to Stay Restaurants	
Th		ions ving publications and brochures are available: ritems 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!	(26
	Email	Kalamazoo County Map Kalamazoo County is located in the heart of the Great Lakes region, midway between Chicago and Detroit.	Kalam County
	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.	



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, Kala	nazoo Area Fake	Õ	₽	۲	Cart	МІС	Q
Reports						Feedba	ck?
	your organization more efficiently. Search for a r Or build your own custom reports using the Ad						
Report Finder Search by Keyword	Reports Found 3						
Search by Category Popular / Frequently Used Recent Featured Recently Added	Custom Member Report Allows creation of a custom m fields/columns, sorting, criteria Custom Representative Repor Allows creation of a custom re	a, etc. t		-		•	Need Help?
 Membership Advertising Billing Events Information Request Job Postings 	fields/columns, sorting, criteria Mailing Labels Generates mailing labels for m	a, etc.				•	_
 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: <u>Billing</u>

Member Name	Balance	Member Ir	formation								
A Plus Painting	0.00	Compa									
A+ Security & Repair	4095.16		Primary Phone: (123) 456-7890 Fax Number:				Mbr Status: Active Join Date: 9/1/2022				
ABC Heating & Cooling	-4.16	Email	Address: mwest@mailir		Drop Date						
Ace Hardware	5840.40		nber Rep: Andrew Lewis		Full-Time Part-Time						
Andiamos Italian Restaurant	0.00	Member Type: Nisswa Part-Time: Billing Contact: Nicklas Lidström - Manager					ie. 5				
Anthony's on Main	-676.25		1903 W. Michi Kalamazoo, M								
Back to Basics Wellness C	1056.17		(123) 456-789								
Ballet Kalamazoo	4903.17										
Barry's Boats	5015.75	75 New Invoice New Sales Receipt New Payment New Credit Apply Credit									
Bayside Painting Company	392.97										
Beautiful Home Interior De	963.00										
Big Foot Shoe Shop	317.49	Trans	action Date: 4/8/2023	to	more Refre	sh					
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				
SIYSTAI CIEAL WITHOUW WAS	18819.50	PAYMENT	VISA*4242	<u>1531</u>	4/1/2024	250.00	0.00				
Dana's Fashion Boutique Diephouse Realty	2373.32	PAYMENT	123	<u>1571</u>	3/13/2024	250.00	0.00				



Cloud Drive

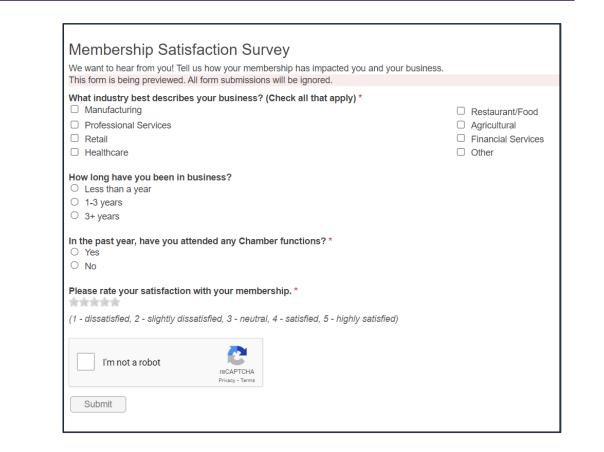
- Personal Files
- Staff Files
- Member Files
 - Members <u>access</u> the documents via the Member Information Center (MIC)
- Event Files
- Group Files
- KB: <u>Storing Documents in the</u> <u>Cloud</u>
- Requires Plus edition or greater

Cloud Drive								
My Documents Share	d Documents	Email Images	Email Attachments	Member Fi	iles	Event Files	Group F	iles
Gener	al Task Files							
My Documents	are private to			Ť. U	Jpload	New folde	er III	
[Private: My Documents]	Name		۵	Dimensions		Modified		
5-Benefits-of-GZ-Pay-I	A D-Bene	fits-of-GZ-Pay-Hand	lout.pdf		1.57mb	2023-01-0	3T10:15:5	3-06:
CM-MZ-Administrative-	ID CM MT	-Administrative-Setu	ıp-Handout.pdf		625.35k	b 2023-01-0	3T10:15:5	4-06:
CM-MZ-Daily-Billing-A	2 Citri 1112	-Billing-Setup-Hand	out.pdf		830.82k	b 2023-01-0	3T10:15:5	5-06:
Komer Kanager CM-MZ-Event-Manager CM-MZ-Event-Setup-Harakan CM-MZ-Event-Setup-Harakan Setup-Harakan Setup-Setup-Harakan Setup-	L CM-M7	-Daily-Billing-Activi	ies-Handout.pdf		1.45mb	2023-01-0	3T10:15:5	6-06
CM-MZ-Golf-Tourname		-Event-Management	-Handout.pdf		824.07k	b 2023-01-0	3T10:15:5	7-06:
CM-MZ-Member-Admin		-Event-Setup-Hando	ut.pdf		920.69k	b 2023-01-0	3T10:15:5	8-06:
CM-MZ-Member-Inforn	D CM M3	-Golf-Tournament-H	landout.pdf		1.09mb	2023-01-0	3T10:15:5	9-06:
CM-MZ-Solution-Overv		-Member-Administr	ation-Handout.pdf		667.66k	b 2023-01-0	3T10:16:0	0-06:
CM-MZ-Working-with-	L CM-M/	-Member-Informatio	n-Center-Handout.pdf		783.31k	b 2023-01-0	3T10:16:0	1-06:
		-Member-Managem	ent-Handout.pdf		774.54k	b 2023-01-0	3T10:16:0	1-06:
	K CM-MZ	-Solution-Overview-	Handout.pdf		2.65mb	2023-01-0	3T10:16:0	4-06:
	K CM-MZ	-Working-with-Com	munications-Handout.pdf		741.53k	b 2023-01-0	3T10:16:0	5-06:
	CM-MZ	-Working-with-Grou	ps-Handout.pdf		1.14mb	2023-01-0	3T10:16:0	7-06:



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

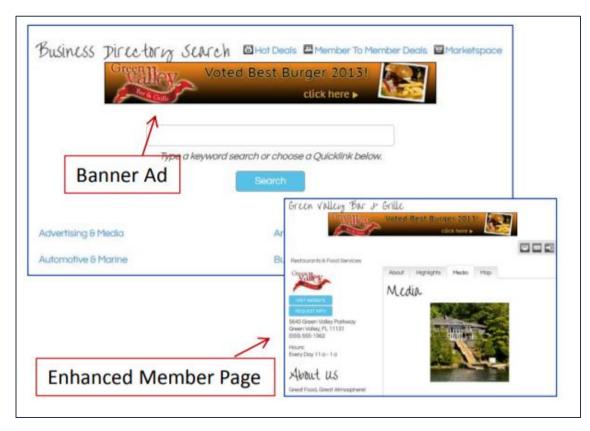
- Can <u>sell</u> items online to your members or general public
 - Including <u>downloadable</u> products
- Available by Request
 - <u>Contact Support</u> to enable
- KB: <u>eCommerce</u>
- Requires Plus edition or greater





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.

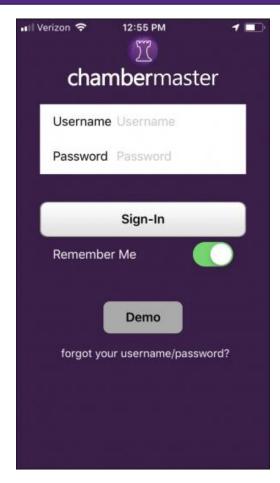
Contact Information

* 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

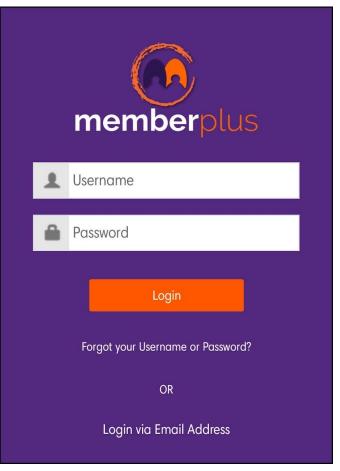
- Mobile companion for staff
- Access database anywhere
- Provides real-time membership information
- <u>Manage</u> members
- Communicate with members
 - <u>Call</u>
 - <u>Community Feed</u>
 - <u>Email</u>
- <u>Point of Sale</u> module
- <u>Check-in</u> event attendees
- KB: <u>StaffApp</u>





MemberPlus App

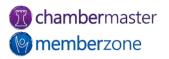
- Free mobile app available to all members
- Receive <u>notifications</u> from your organization
- <u>View</u> member listings
- <u>Update</u> their own profile information
- Register, pay and check-in for <u>events</u>
- Interact with other members
- KB: <u>MemberPlus App</u>



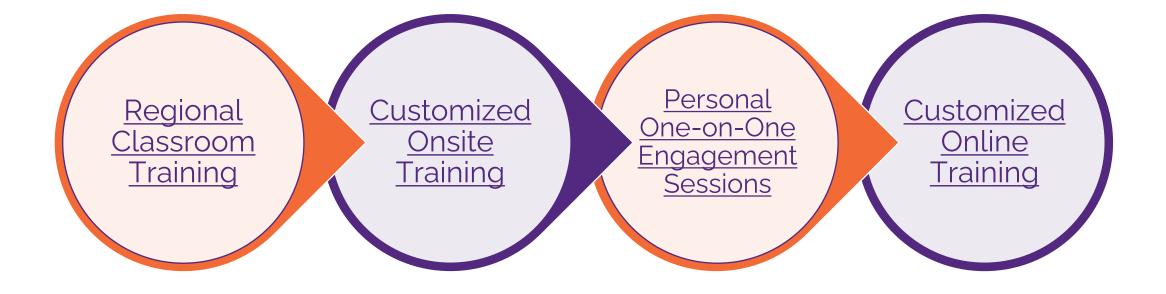


Training Resources





Expanded Training Offerings





Questions?

