Member Management

Agenda
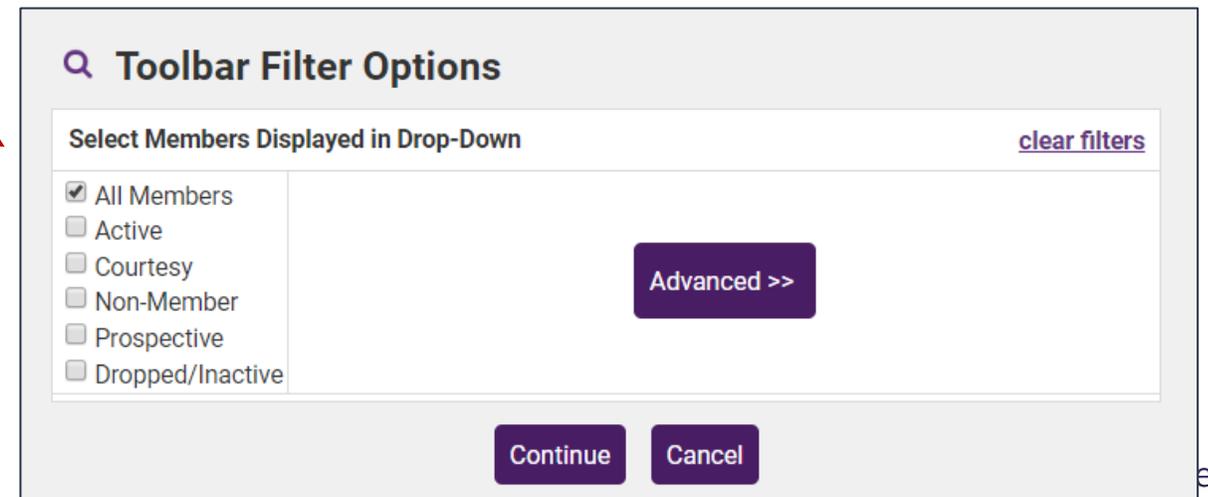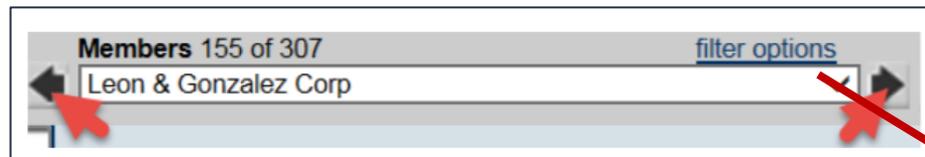
- Finding Members
- Getting Ready
- Managing Prospects
- Managing Members
  - Add member/rep record
  - Manage Member Fee Schedule
  - Drop member
  - Reinstate a member
  - Merge Members
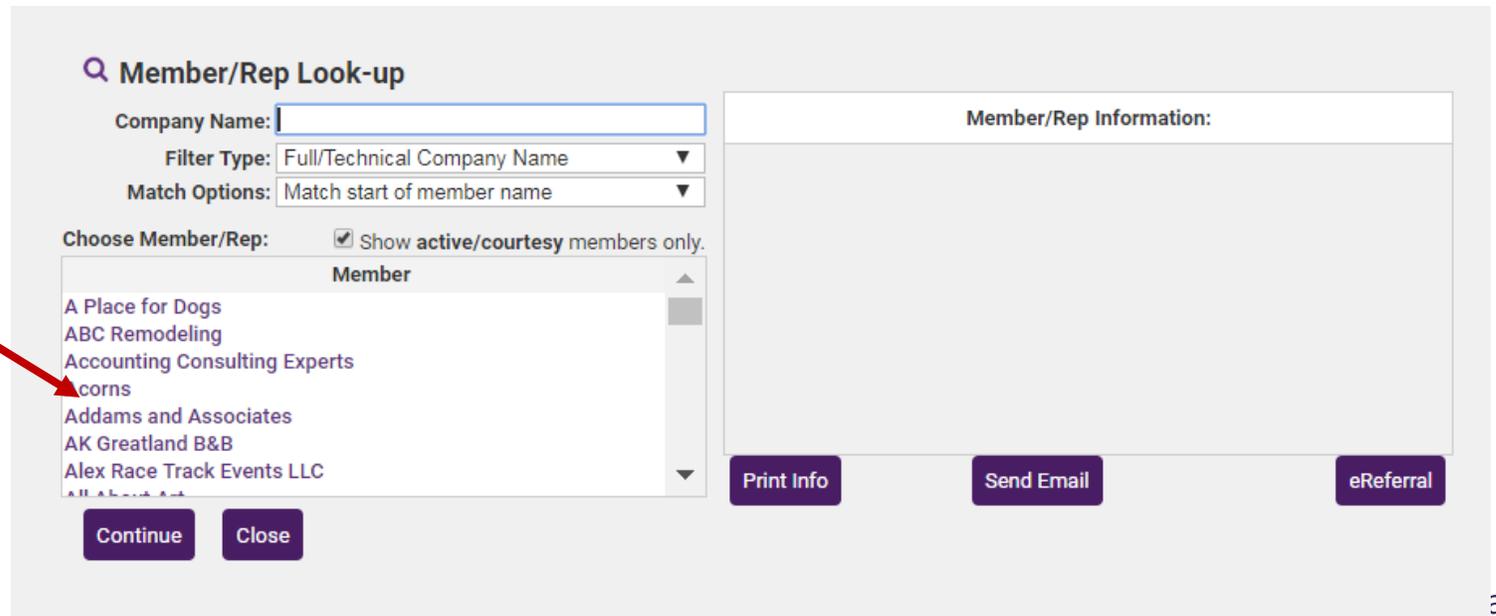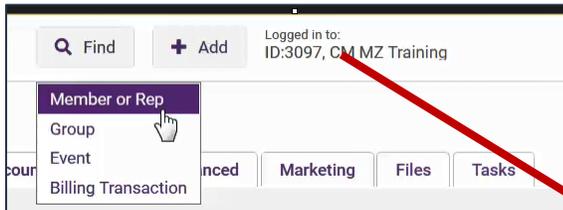- Member Reports

Member Filtering Options

Member Drop Down Options and Filters:

- In the Header Bar black arrows move through the list of members
- Filter Options

Find a Member/Rep

The Find button allows you to search for Members or Reps, Groups, Events or Billing transactions from where ever you are in the database

Getting Started… Custom Fields

Your ChamberMaster software provides you with standard data fields such as Phone, Address, etc.

What additional data would you like to track?

Why did a member join?

What are their interests?

What are their pain points?

Ownership?

Industry?

Getting Started… Custom Fields

Track additional data using Custom Fields

KB: Custom Fields

Getting Started... Membership Types

Membership Types are a way by which you can organize/segment your members.

Most frequently these are used to call out membership level (Silver, gold, platinum) but can truly be used as you need to identify a characteristic of your members.

KB: How are Membership Types used?

Getting Started... Membership Types

Membership Types are used throughout the application once they are defined and assigned to your members.

- Reports may be viewed/generated by Membership Type

- Communication may be sent/created by Membership Type

- Event invitations may be sent by Membership Type

Getting Started... Define Directory Categories

Your directory categories provide a way to organize and segment your membership so that visitors to your website can find exactly what they are looking for.

KB: Setup Directory Categories
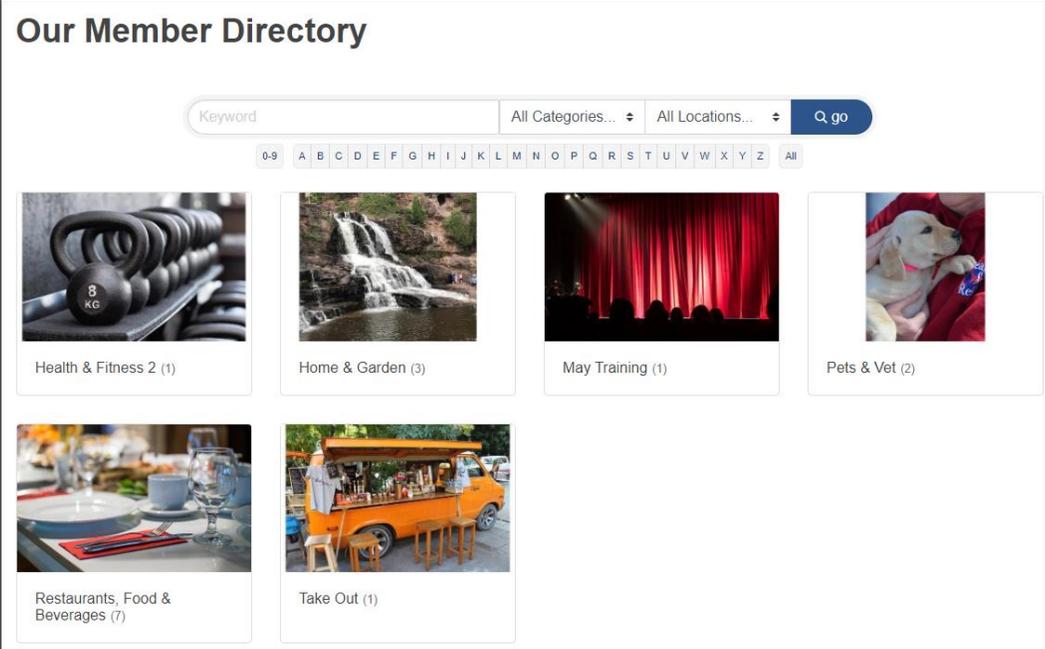
Managing Prospects

Your ChamberMaster database is not just a way by which you can manage contacts with a membership but also track members interested in joining

KB: [Add a Prospective Member](#)

Add a Member – Membership Application

Members can easily be added to your database by using the Membership Application

KB: Setup Membership Application
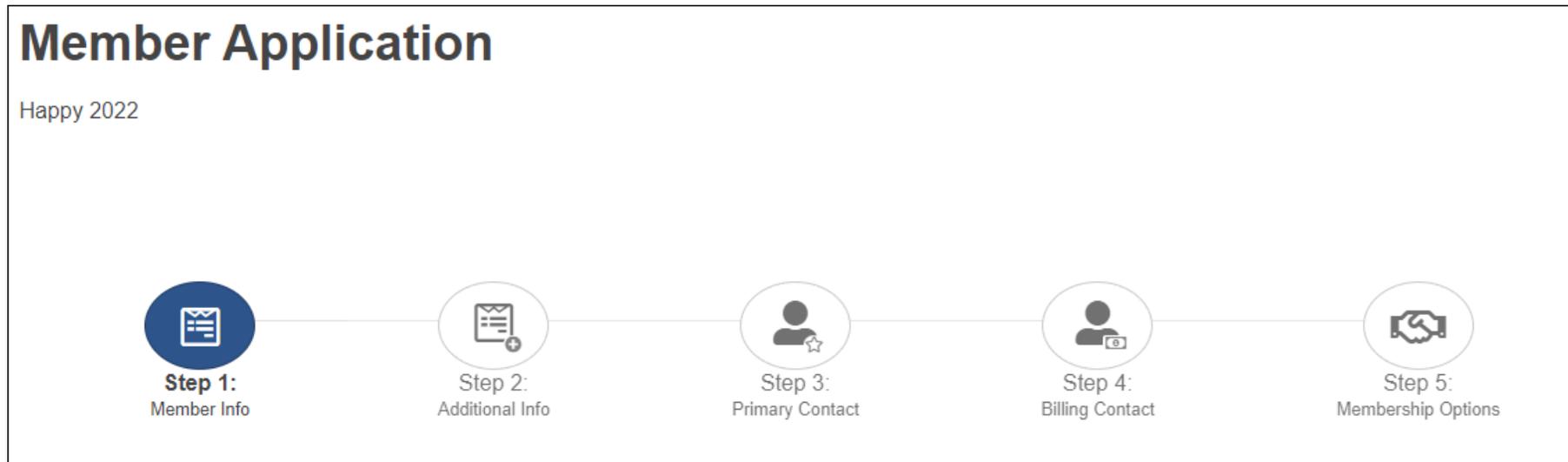
Add a Member – Membership Application

You can configure your system to automatically accept applicants as new members, or you can manually approve the applications.

KB: Approve Membership Applications

Add a Member

When adding a new member to the database, you simply fill in the requested information as the wizard walks you through four information screens,

KB: [Add a New Member](#)

Update Member Data

Additional information about your members can be tracked on the member's General tab.

KB: Edit Member General Information

Manage Member Fee Schedule

Membership Fees & Dues can be assigned to a member when you first add a member, when a member application is processed, or directly on the member's Account tab.

KB: Assign Recurring Membership Fees to a Member

Manage Member Reps

The staff of an organization is tracked on the reps tab. You will be able to add new reps, update rep information, deactivate reps and setup MIC credentials

KB: Manage Member Reps

Manage Member Reps MIC Login Credentials

From the Reps tab you will be able to manage a rep's MIC Login credentials
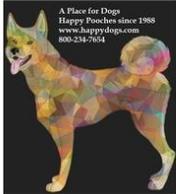
KB: Manage Rep Login Credentials

Member Web Display

One of the benefits you may be offering to your members is display in your Directory. On the member's web display tab you can update directory information

Web Display "Packages"

Basic Package

Enhanced Package (requires Premier or Pro edition of the software.

KB: Member Web Display Participation Options

Member Stats

The member's **Stats** tab gives staff the ability to view and print the member's event activity, the website statistics reports showing the member's accounts receivable billing history, and a profile of the member's account.

KB: View Individual Member Stats

Member Stats

Did you know.... You can generate a report of members along with their website stats to easily review and send to members

KB: Member Benefit Batch Print or Email

Drop a Member

Members who are no longer participating may be dropped (set inactive) but still have their history and information available in the database.

KB: Drop a Member

Re-instate a Dropped Member

After an active member has been set to **Dropped** status, setting them back to **Active** status will display options to allow you to return reps back to active status and reinstate their group participation if desired

KB: Reactivate/Reinstate Member

Merge Members

In the event that you have duplicate members in your database (perhaps you had added a prospect, then the prospect applied online), you can easily merge two contacts together

KB: [Merge Members](#)

Common Member Reports

- [Member Join Reports](#)
- [Member Drop Analysis Report](#)
- [Custom Member Report](#)
- [Custom Representative Report](#)

Questions?