

# Member Management

# Agenda

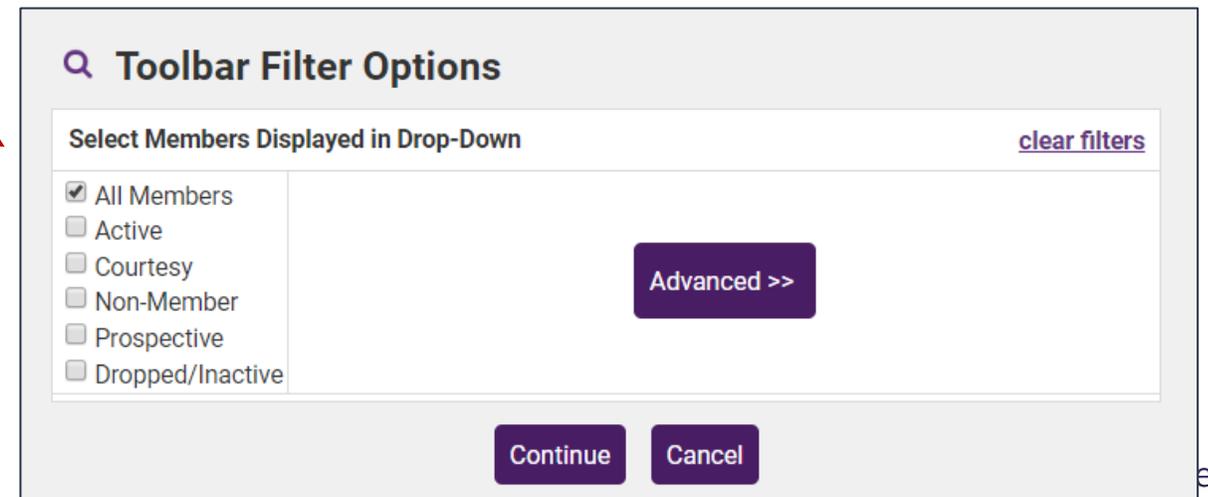
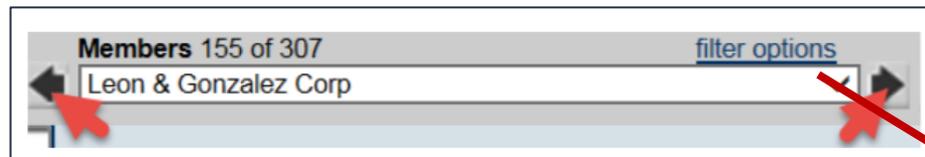
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- Finding Members
- Getting Ready
- Managing Prospects
- Managing Members
  - Add member/rep record
  - Manage Member Fee Schedule
  - Drop member
  - Reinstate a member
  - Merge Members
- Member Reports

# Member Filtering Options

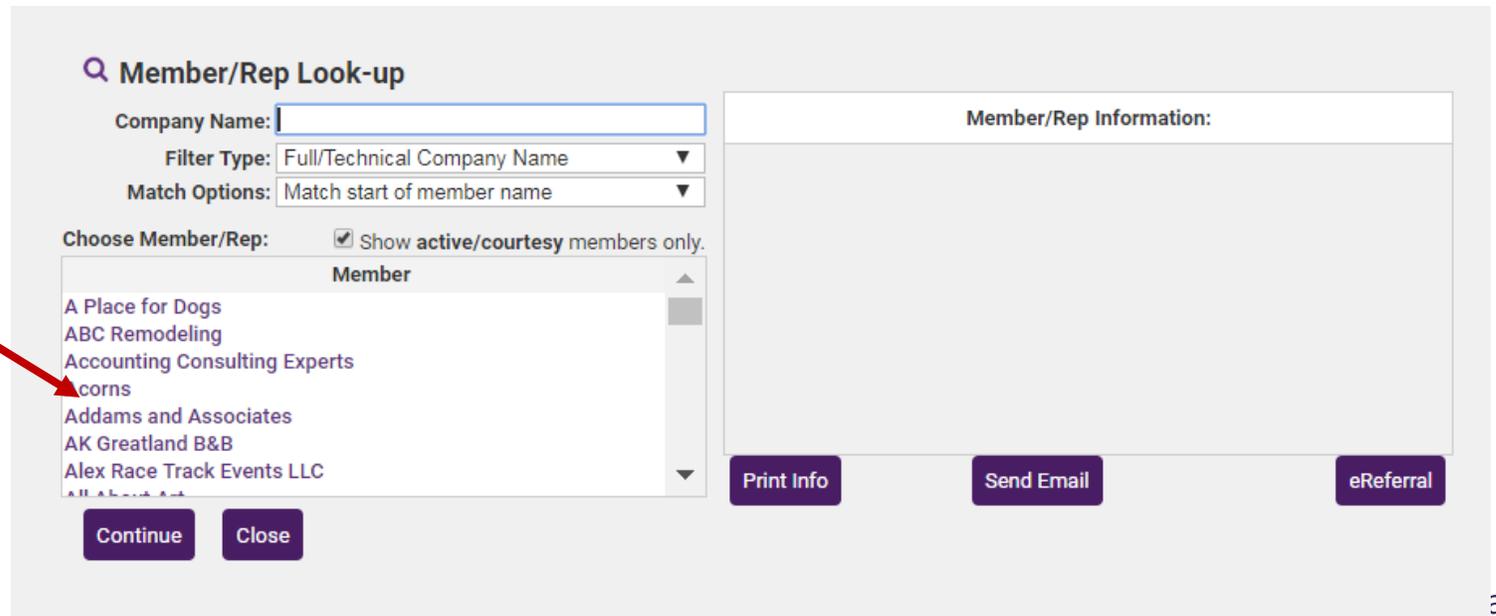
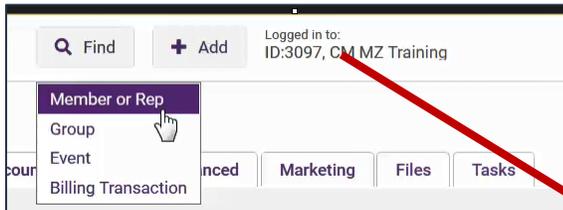
## Member Drop Down Options and Filters:

- 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

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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](#)

 **Custom Fields** [Add/Edit Custom Fields](#) 

**Warning!** Custom Fields should never be used to collect or store credit card numbers, social security numbers or other personal information. If this information is being collected, you will be required to remove that information.

**General Information**

Established Year:	<input type="text"/>	<i>(Numeric - integer)</i>
How did you hear about us?:	<input type="text" value=""/>	<i>(Select)</i>
Join Reason:	<input type="text" value="Educational Opps"/>	<i>(Select)</i>
Ownership:	<input type="text" value="Minority Owned"/>	<i>(Select)</i>

# 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?](#)

Membership Types		
Current Definitions		
Membership Type	v4 Display 	v3 Display Icon 
Bronze	<input type="checkbox"/>	<input type="button" value="set icon"/> <input type="button" value="x"/>
COLLABORATE	<input checked="" type="checkbox"/>	<input type="button" value="set icon"/> <input type="button" value="x"/>
connect	<input type="checkbox"/>	<input type="button" value="set icon"/> <input type="button" value="x"/>
Corporate Membership	<input checked="" type="checkbox"/>	<input type="button" value="set icon"/> <input type="button" value="x"/>
Dealer	<input type="checkbox"/>	<input type="button" value="set icon"/> <input type="button" value="x"/>
Diamond Membership	<input checked="" type="checkbox"/>	 <input type="button" value="x"/>
Friends of Community	<input type="checkbox"/>	 <input type="button" value="x"/>
Gold Membership	<input checked="" type="checkbox"/>	 <input type="button" value="x"/>
Golden Membership	<input type="checkbox"/>	<input type="button" value="set icon"/> <input type="button" value="x"/>
Large Corporate	<input checked="" type="checkbox"/>	<input type="button" value="set icon"/> <input type="button" value="x"/>
March Membership	<input checked="" type="checkbox"/>	<input type="button" value="set icon"/> <input type="button" value="x"/>

# Getting Started... Membership Types

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

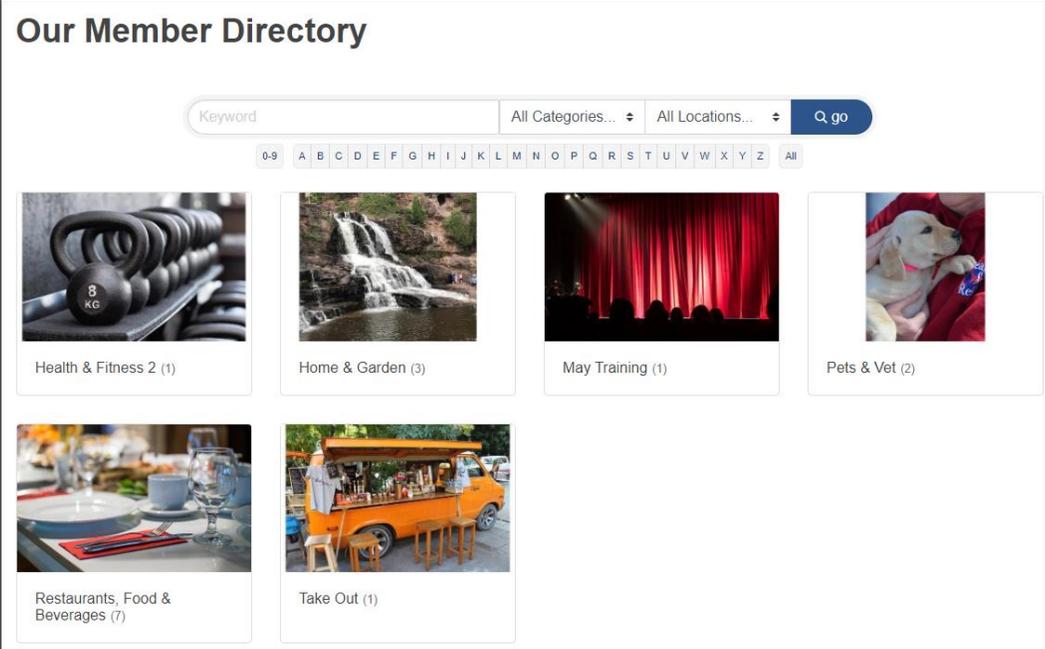
- Reports may be viewed/generated by Membership Type
- Communication may be sent/created by Membership Type
- Event invitations may be sent by Membership Type

Membership Types			
Current Definitions			
Membership Type	v4 Display ?	v3 Display Icon ?	
Bronze	<input type="checkbox"/>		set icon X
COLLABORATE	<input checked="" type="checkbox"/>		set icon X
connect	<input type="checkbox"/>		set icon X
Corporate Membership	<input checked="" type="checkbox"/>		set icon X
Dealer	<input type="checkbox"/>		set icon X
Diamond Membership	<input checked="" type="checkbox"/>		X
Friends of Community	<input type="checkbox"/>		X
Gold Membership	<input checked="" type="checkbox"/>		X
Golden Membership	<input type="checkbox"/>		set icon X
Large Corporate	<input checked="" type="checkbox"/>		set icon X
March Membership	<input checked="" type="checkbox"/>		set icon X

# 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](#)

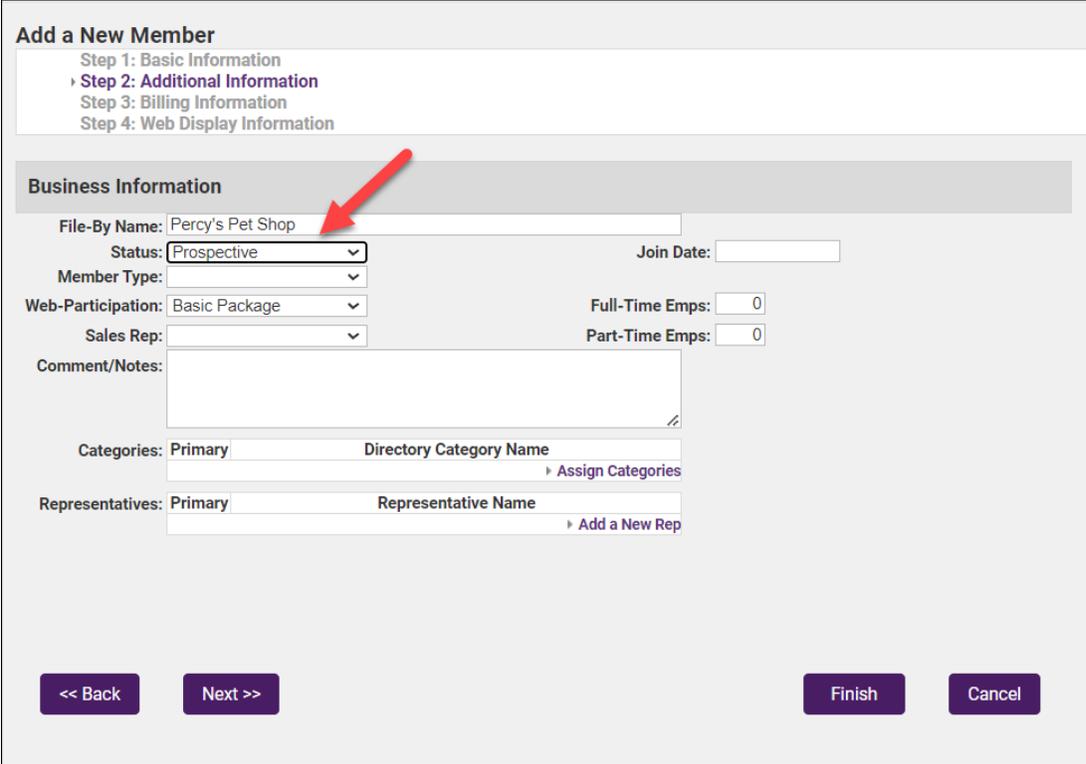


The screenshot displays the 'Our Member Directory' page. At the top, there is a search bar with a 'Keyword' field, a 'All Categories...' dropdown, an 'All Locations...' dropdown, and a 'go' button. Below the search bar is a navigation menu with letters A through Z and an 'All' option. The main content area features six category cards, each with a representative image and a label with a count in parentheses:

- Health & Fitness 2 (1)
- Home & Garden (3)
- May Training (1)
- Pets & Vet (2)
- Restaurants, Food & Beverages (7)
- Take Out (1)

# 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 New Member**

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

**Business Information**

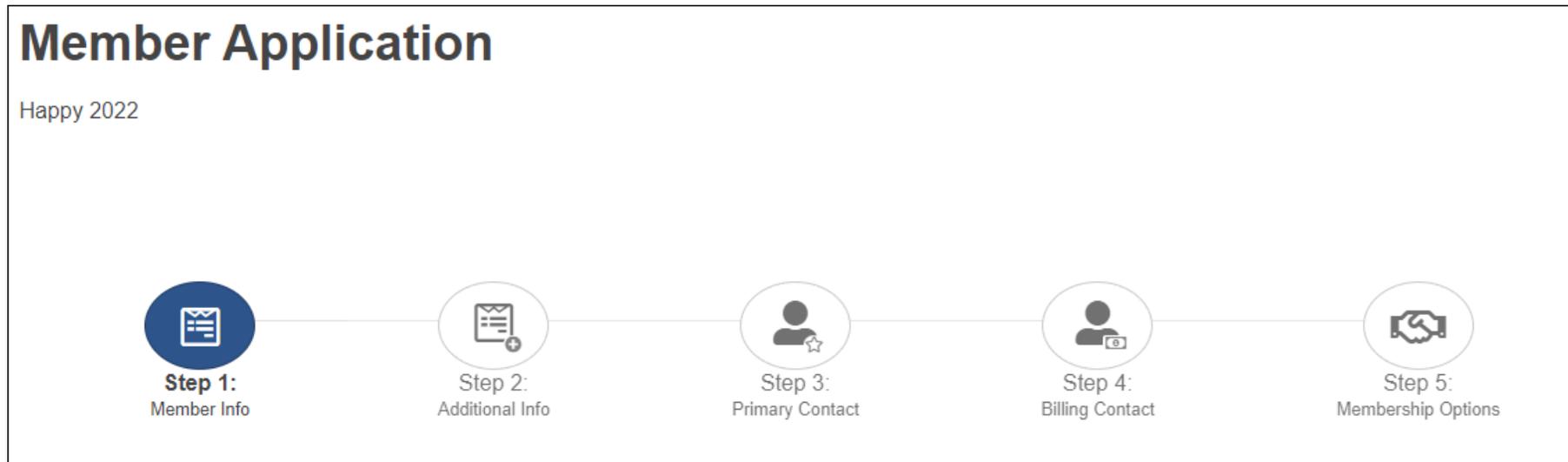
File-By Name: Percy's Pet Shop  
Status: Prospective  
Member Type:   
Web-Participation: Basic Package  
Sales Rep:   
Join Date:   
Full-Time Emps: 0  
Part-Time Emps: 0  
Comment/Notes:   
Categories: Primary Directory Category Name  
Representatives: Primary Representative Name

<< Back    Next >>    Finish    Cancel

# 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](#)

### Member Application Requests

[Pending Applications](#) [Application History](#)

**NEW!** An Apply Payment selection appears as an available Action if payment was made by credit card. Use the Action links below to create the invoice first, apply the payment next, and then approve.

For more information click the ? icon that displays after the Prospective Membership Application title.

#### Prospective Member Applications ?

Applied	Member Name <small>(click the members' name to view more details)</small>	Actions			
5/8/2019	Bonner Springs Edwardsville-Area Chamber of Commerce	Approve	Decline	Approve/Create Invoice	Create Invoice Only
5/8/2019	Verona Chamber of Commerce	Approve	Decline	Approve/Create Invoice	Create Invoice Only
5/8/2019	CCOC	Approve	Decline	Approve/Create Invoice	Create Invoice Only
5/8/2019	Iowa Waukee	Approve	Decline		
8/21/2019	Sweet Treats	Approve	Decline	Apply Payment	Create Invoice
2/6/2020	Cheri's Place	Approve	Decline	Apply Payment	Create Invoice

[Download List](#)

# 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](#)

### Add a New Member

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

#### General Information

Company Name:	<input type="text"/>	Fax:	<input type="text"/>	<input type="checkbox"/> Call First
Primary Phone:	<input type="text"/>	Email:	<input type="text"/>	
Alternate Phone:	<input type="text"/>	Website:	<input type="text"/>	
Toll-Free Phone:	<input type="text"/>	<input type="checkbox"/> Use Physical Address as the Mailing Address		
Cell Phone:	<input type="text"/>	Mailing Address:	<input type="text"/>	
Physical Address:	<input type="text"/>		<input type="text"/>	
	<input type="text"/>	City:	Nisswa	<input type="text"/>
City:	Nisswa	State:	Minnesota	<input type="text"/>
State:	Minnesota	Zip:	56468	<input type="text"/>
Zip:	56468	Country:	<input type="text"/>	
Country:	<input type="text"/>			

<< Back    Next >>    Finish    Cancel

# Update Member Data

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

KB: [Edit Member General Information](#)

The screenshot displays a member profile for 'A Place for Dogs' with the following details:

- Company Name:** A Place for Dogs
- Primary Phone:** (218) 546-5413
- Alternate Phone:** (218) 546-5413
- Toll-Free Phone:** (800) 463-1234
- Cell Phone:** (empty)
- Physical Address:** 100 S Raider Court
- City:** Crosby
- State:** MN
- Zip:** 56441
- Country:** US
- Fax:** (empty)
- Call First:**
- Email:** cheri.petterson@growthzone.com
- Website:** http://www.growthzone.com

A pop-up window titled 'Use Physical Address as the Mailing Address' is open, showing the following information:

- Use Physical Address as the Mailing Address
- Mailing Address:** 100 S Raider Court
- City:** Crosby
- State:** MN
- Zip:** 56441
- Country:** US

Navigation tabs at the top include: General, Reps, Web, Communication, Account, Stats, Benefit Tracking, Advanced, Marketing, Files, Tasks. Action buttons include: Save, Cancel, Merge Into... (with an info icon). At the bottom right, there are links for 'Email Member' and 'Labels/Envelopes'.

# 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](#)

**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*	Day Charged	Amount**	<input type="checkbox"/>
<a href="#">Corporate Membership</a>		Corporate Membership Dues 2023	1	Monthly	Jan 2023	N/A	\$1440.00	<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.

# 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](#)

**Personal Information for Shannon Jones** [copy business information](#)

Prefix:  [edit prefixes](#)

First Name:\*

Middle Name:

Last Name:\*

Suffix:  [edit suffixes](#)

Contact Preference:\*

Address:

City:

State:

Zip:

Country:

eMail:

Comments:

Greeting:

Job Title:

Rep is currently active with this member. [\(History\)](#)

Primary Contact

Billing Contact

Phone Preference:\*

Work Phone:

Home Phone:

Cell Phone:

Alt. Phone:

Fax:

General CC eMails:

Billing CC eMails:

**Social Network Services:**

LinkedIn:

Facebook:

Twitter:

Instagram:

To edit the list of available Social Network Providers, go under Setup>General Options and Settings and choose 'edit social network services' under General Settings section.

# 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](#)

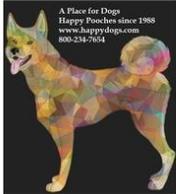
**Login Permissions for Shannon Jones**

**Login Credentials:** Login Name: **shannon** use email  
ⓘ [Password Information](#) change/send password  
delete login account

**Permissions:** Inherited Permission ⓘ Set: **Primary** Change Set View and Manage Permissions

# 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 Photos & Images		
Image Type	Image	Action
Search Results Icon		<ul style="list-style-type: none"><li>Change Image</li><li>Remove Image</li><li>Disable</li></ul>
Logo		<ul style="list-style-type: none"><li>Change Image</li><li>Remove Image</li></ul>
Member Page Header	 <p><b>The Happiest Place for your Pooch</b> <b>A Place for Dogs</b> <b>www.aplacefordogs.com</b> <b>800-123-6543</b></p>	<ul style="list-style-type: none"><li>Change Image</li><li>Remove Image</li></ul>

# Web Display “Packages”

Basic Package

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

KB: [Member Web Display Participation Options](#)

### Web Participation Options

Web-Participation:

Login Credentials: Recommended: If a login account is not created here yet, do not create a new account. Create login accounts under the Reps tab instead. **i**

Display Attributes:

<input type="checkbox"/> Does Not Display On Web	<input type="checkbox"/> Disable All Login Accounts	<input type="checkbox"/> No Web Link on Member Page
<input type="checkbox"/> Cannot Buy Ads/HotDeals	<input type="checkbox"/> Disable Member Info Page	<input type="checkbox"/> Hide Social Networks
<input type="checkbox"/> No Vacancy Calendar	<input checked="" type="checkbox"/> Web Link on Search Results	

**> Generate a URL to open this member's informational page directly.**

Redirect Index:  **i**

# 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](#)

**Available Reports**

- Web Views / Statistics
- Billing
- Other Reports

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**General Information**

Selected Member: A Place for Dogs  
Membership Status: Active  
Membership Type: Large Corporate  
Primary Rep: Shannon Jones  
Billing Rep: Shannon Jones

Member Since: 3/21/2017  
Drop Date: N/A  
Chamber Rep: Hunter Grayson

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**Web Participation**

Web Elements:

- Business Description
- Driving Directions
- Business Address
- Fax Number
- Email Address
- Enhanced Web Presence
- Priority Placement
- Photos

**View Member Page**

- Hours of Operation
- Keywords
- Phone Number
- Website URL
- Map
- Search Result Icon
- Search Result Description

**Statistics:** (last 12 months)

- 21 Member Page Views
- 4 Category Search Result Displays
- 91 Other Search Result Displays
- 0 Links to External Website
- 0 Visits to Map
- 0 Emailed Consumer Contact Requests
- 0 Vacancy Calendar Hits

**Member Page Views per Month**

Month	Page Views
Jan 22	5
Feb 22	5
Mar 22	5
Apr 22	5
May 22	5
Jun 22	5
Jul 22	5
Aug 22	5
Sep 22	5
Oct 22	5
Nov 22	5
Dec 22	5
Jan 23	5

# 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](#)

A Place for Dogs  
100 S Raider Court  
Crosby, MN 56441

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**General Information**  
Selected Member: A Place for Dogs  
Membership Status: Active  
Membership Type: Large Corporate  
Primary Rep: Shannon Jones  
Billing Rep: Shannon Jones  
Chamber Rep: Hunter Grayson

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**Web Participation**  
Web Elements:

<input checked="" type="checkbox"/>	Business Description	<input checked="" type="checkbox"/>	Hours of Operation
<input checked="" type="checkbox"/>	Driving Directions	<input checked="" type="checkbox"/>	Keywords
<input checked="" type="checkbox"/>	Business Address	<input checked="" type="checkbox"/>	Phone Number
<input checked="" type="checkbox"/>	Fax Number	<input checked="" type="checkbox"/>	Website URL
<input checked="" type="checkbox"/>	Email Address	<input checked="" type="checkbox"/>	Map
<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>			

**Enhanced Web Presence**

<input type="checkbox"/>	Priority Placement	<input type="checkbox"/>	Search Result Icon
<input type="checkbox"/>	Photos	<input type="checkbox"/>	Search Result Description

Hit Statistics:  
(last 12 months)

4	Visits to My Directory Categories
91	Times Displayed In Search Results
21	Visits to Member Information Page
0	Links to External Website
0	Visits to Map
0	Emailed Consumer Contact Requests
0	Vacancy Calendar Hits

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<b>Account/Finance</b>		<b>Communication</b>	
Renewal Month:	July	Groups:	26
Current Balance:	\$1160.3968	Lead List Groups:	2
Recurring Fees:	\$1440.0(annual total)	Leads Sent to List:	0 (past 12 months)
		eReferrals:	3 (past 12 months)
		Correspondence:	66 (past 12 months)

# 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](#)

### Drop Member Options

#### Gretna Example

Drop Date:  Drop Reason:

Drop Details:

Representatives			
Contact Name	Title	Rep Status ?	Group Status ?
All Member Representatives			
Kara Alexander		Set as Inactive	Leave Unchanged
Josie Marion		Set as Inactive	Leave Unchanged
Jenna Parsons		Set as Inactive	Leave Unchanged

#### Billing Information

Current Balance: **\$800.00**

Recurring Membership Dues & Fees					
<a href="#">check all</a> <a href="#">uncheck all</a>	Name	Description	Quantity	Frequency	Amount*
<input type="checkbox"/>	HBA Fee Item		1	Annually	\$500.00
<input type="checkbox"/>	State Membership Dues		1	Annually	\$50.00

Remove Selected Fee Items

# 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](#)

The screenshot shows the 'Activate Member' interface for a member named 'CreativChristie'. It features a table for 'Representatives' and a section for 'Member Page and Login Settings'.

Contact Name	Rep Status ?	Group Status ?
All Member Representatives		
Chris Christie	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

Buttons: Save and Exit, Cancel

# 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](#)

### Member - Merge

#### Flutists

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 **Flutists** or **Flutists**. The currently selected value is highlighted in green.

After the merge is complete, please use the Merge Selected Rep feature on the Reps tab to consolidate reps if needed. In addition, please review the Account, Advanced, and Marketing tabs to disable or delete any duplicate information if necessary.

	Source Record	Destination Record	New Destination Record
Field	Flutists (Created: 1/21/2023):	Flutists (Created: 2/7/2020):	Merged Value
<b>Contact Fields</b>			
Email	flutists@mailinator.com		
<b>Physical Address Fields</b>			
City	Crosby		
Address Line 1	14 Master Lane		
Postal Code	56441		
State/Province	MN		
<b>Mailing Address Fields</b>			
City	Crosby		
Postal Code	56441		
State/Province	MN		
<b>Display Fields</b>			

# Common Member Reports

- Member Join Reports
- Member Drop Analysis Report
- Custom Member Report
- Custom Representative Report

**Member Listing by Join Date**

Sales Rep:

Join Date from:

to:

Display Options:

Include Active Members Only?:

Show Totals:

Include One-Time Fees:

Use Fee Active and Exp. Dates in Criteria:

Include Web Tab Description:

Member Name Option:

Sort Option:

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1 of 1 | Save as [PDF](#) [Excel](#) [Word](#)

**Members Listing By Join Date**  
9 Members joined from 12/21/2017 to 1/7/2019

Member Name	Join Date	Status	Web-Participation	Notes
Children's Home	7/31/2018	Active	None	
Alex Race Track Events LLC	7/31/2018	Active	Basic	
Cakes by Stefani	7/31/2018	Active	Enhanced	
Mason & Mayton Renovation	7/31/2018	Active	Basic	
Burgers & Booz	7/31/2018	Active	Enhanced	
Tasty Pallet	7/31/2018	Active	Enhanced	

# Questions?