

ChamberMaster/MemberZone Member Management – The Basics

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Agenda

- Members Overview
- Add member/rep record
- Drop member
- Reinstate a member
- Explain the community member
- Advanced filtering in the members module
- Find button explained
- Add button explained
- How to use the Merge button How to use the Delete button
- Common member reports

Member Module Overview

- **General:** Basic member information, membership status, sales stage, join date, & custom fields
- **Reps:** Basic member representative information, their personal web display options, & group participation, individual rep login permissions
- **Web:** Member description and contact information that displays on the member information page, web participation level (basic or enhanced), member login name and password, web display attributes, member logo, photos and images.
- **Communication:** Displays communication history for this member; ability to log a call, print a label, send email or send an eReferral. Task Reminders are scheduled here.
- **Account:** Assign Billing rep and billing renewal month, account information, membership fees, view invoice and payment activity

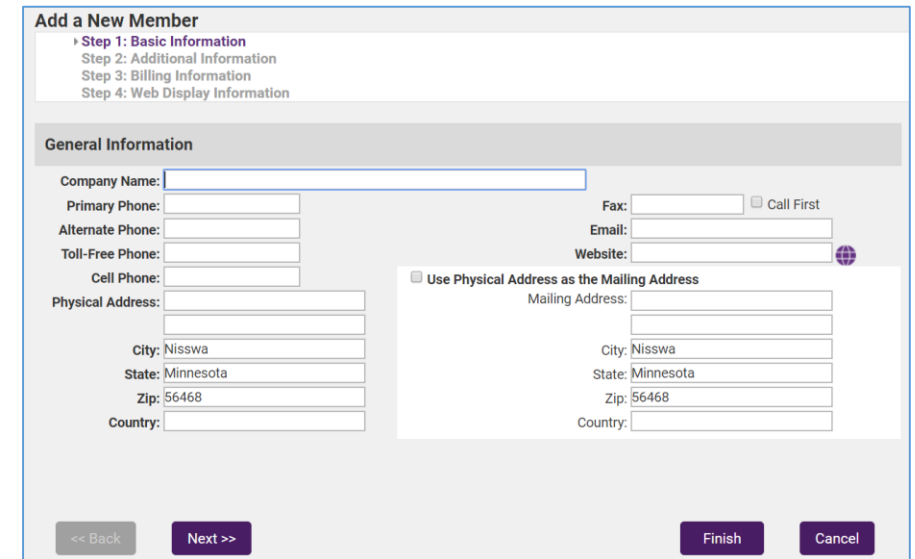
Member Module Overview

- **Stats:** Member reports for event activity, web hits, Hot Deal hits, Job Posting Hits, MarketSpace hits, A/R History, Member Benefit and Member Profile
- **Lodging:** Optional lodging information including facility types, lodging amenities, and vacancies. Only available if **Lodging** module has been enabled.
- **Advanced Options:** Business categories, location (if enabled), Hot Deals, job postings .Manage your members
- **Marketing:** Allows banner advertisements to be loaded for a member that will appear at designated places on your website.
- **Files:** Area to upload files and documents that should be associated with a member. This is member-specific storage of files. E.g. Upload a member contract or agreement for reference by your staff.

WIKI: [An Overview of the Member Module Tabs](#)

Add a Member

- WIKI: [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. You will be asked to fill in the following information screens:
 - General Information
 - Additional Information
 - Billing Information
 - Web Display Information



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:

Primary Phone: Fax: Call First

Alternate Phone: Email:

Toll-Free Phone: Website:

Cell Phone:

Physical Address:

City: Nisswa

State: Minnesota

Zip: 56468

Country:

Use Physical Address as the Mailing Address

Mailing Address:

City: Nisswa

State: Minnesota

Zip: 56468

Country:

<< Back Next >> Finish Cancel

Drop a Member

- WIKI: [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. Members should only be deleted when history is not necessary or when a member was mistakenly created.

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

check all uncheck all	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
- WIKI: [Reactivate/Reinstate Member](#)

Activate Member

CreativChristie

Representatives		
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

Save and Exit **Cancel**

Community Member

- The Community Member record provides a special way to organize information for a person that has some association with your association – but is not associated with a member.
- For example, a person who needs to be in a group that receives email, but isn't a member would be a good example of a Community Member.
- WIKI: [Community Member](#)

Contact Information

Member: **Community Member** [change member](#)

Company:

Prefix: [edit prefixes](#)

First Name:

Middle Name:

Last Name:

Suffix: [edit suffixes](#)

Greeting:

Job Title:

Primary Contact

Contact Preference:

Phone Preference:

Address:

City:

State:

Zip:

Country:

eMail:

Work Phone:

Home Phone:

Cell Phone:

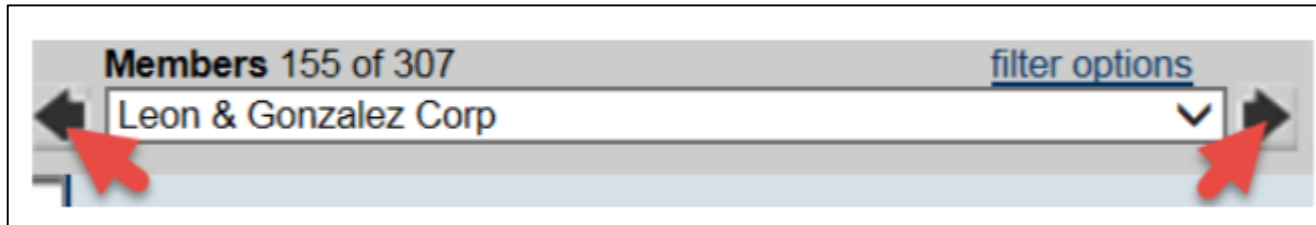
Alt. Phone:

Fax:

Comments:

Member Drop Down Options and Filters

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

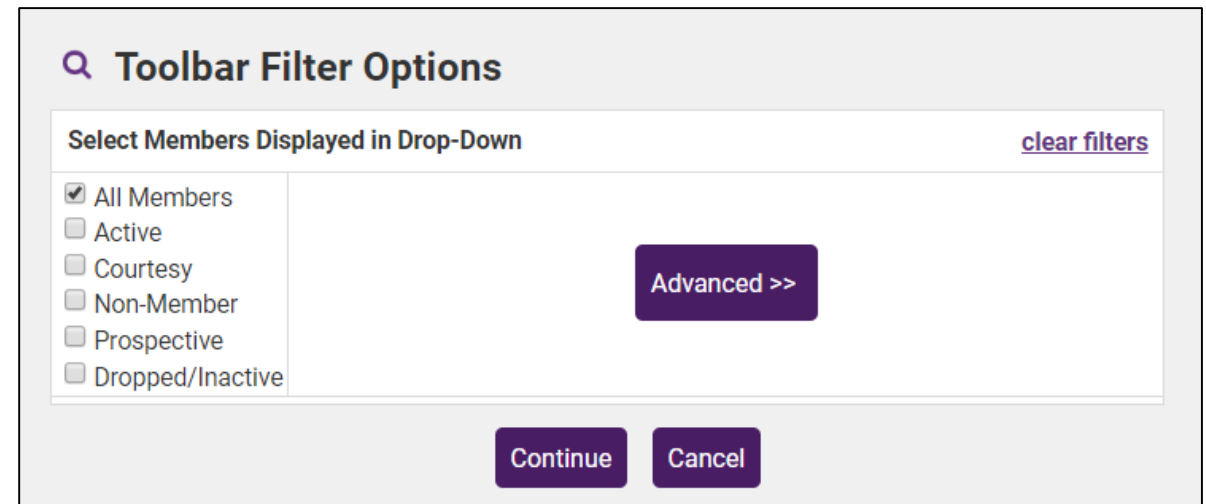


Member Drop Down Options and Filters

- **Filter Options**

- Sort the list by member status
- Advanced filtering
- Clear filters sets the drop down back to the default list of Active only members

WIKI: [Find A Member](#)



Toolbar Filter Options

Select Members Displayed in Drop-Down [clear filters](#)

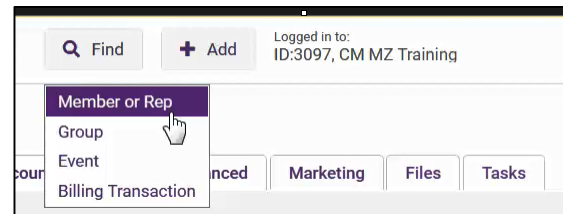
- All Members
- Active
- Courtesy
- Non-Member
- Prospective
- Dropped/Inactive

Advanced >>

Continue **Cancel**

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



Find Button

- This button stays at the top of the database regardless of the module you are in so that you are able to find information quickly
- WIKI: [Find a Member](#)

Member/Rep Look-up

Representative Name:

Filter Type: Representative Name ▼

Match Options: Match start of rep's first name ▼

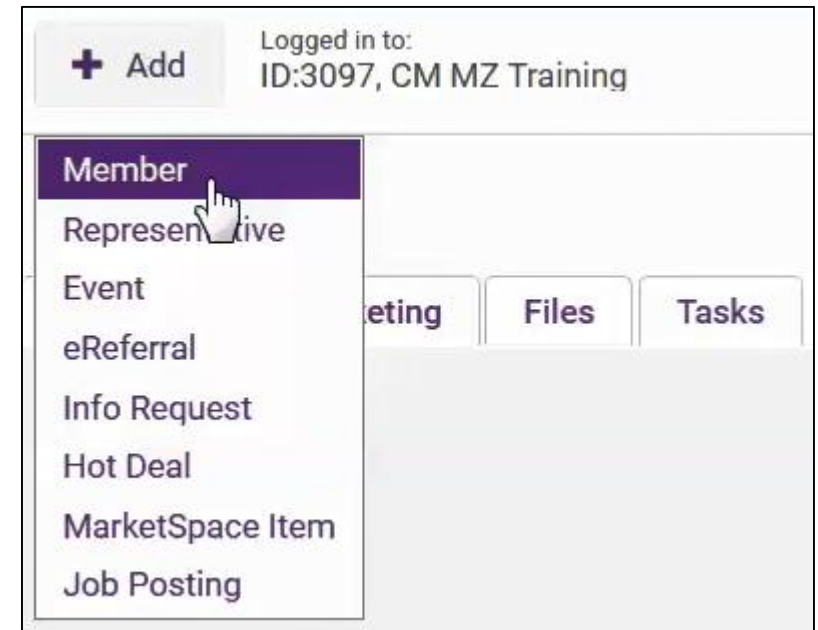
Choose Member/Rep: Show active/courtesy members only.

Representative	Member
	HBA Example 4 -
	Merry Homes Inc -
Anna Lane	Lakes Plumbing - Anna Lane
Audra Winters	Get Pretty
Awesome Rep Yes	The Best Company In the World
Becky Seward	Great Breakfasts
Becky Seward	Great Breakfasts - Becky Seward

Member/Rep Information:

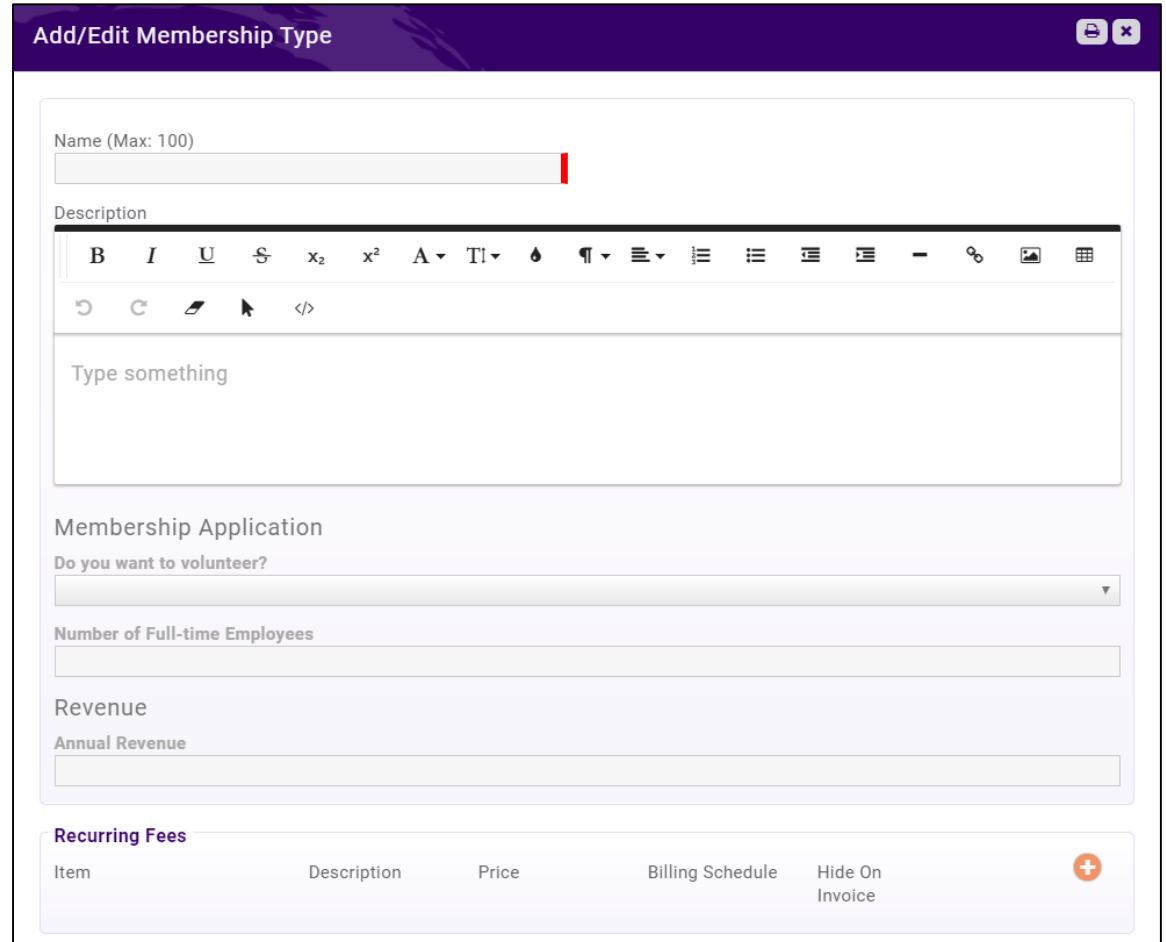
Add Button

- The add button allows you to add information easily from where ever you are in the database
- This button will stay at the top of the database regardless of what module you are in



Add/Edit Membership Type

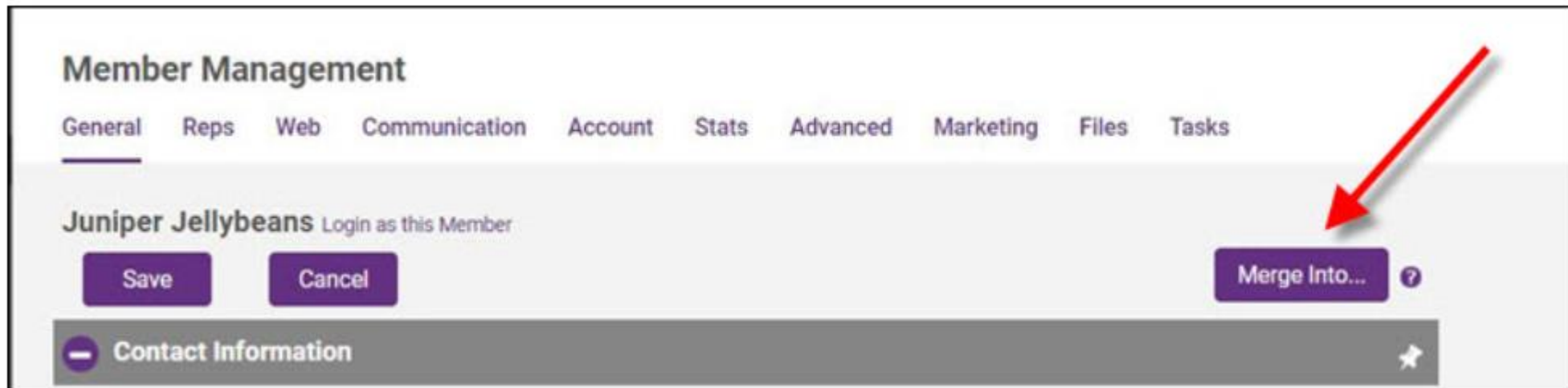
- Basic Setup
 - Name/Description
 - Custom Fields
 - Recurring Fees
 - One Time Fees
- WIKI: [Adding a New Membership Type](#)



The screenshot shows the 'Add/Edit Membership Type' form. It includes a 'Name (Max: 100)' text field, a 'Description' field with a rich text editor toolbar, and several sections for application details: 'Membership Application' with a 'Do you want to volunteer?' dropdown, 'Number of Full-time Employees' text field, 'Revenue' section with an 'Annual Revenue' text field, and 'Recurring Fees' section with a table header: Item, Description, Price, Billing Schedule, Hide On Invoice, and a plus icon for adding items.

Merge member records – Admin only option

- WIKI: [Merge Members](#)



Common Member Reports

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

