ChamberMaster/MemberZone Administrative Setup



Agenda



- Adjust browser settings
- Update Organization Information
- Manage Employees and Reps
- Manage Business Categories
- Update Membership Types

Adjusting your Browser Settings



Accessing your ChamberMaster or MemberZone from a computer that has never run it before requires a few configuration changes to the web browser and any pop-up blocker software.

These selections should only need to be set once, but may need to be checked again if updates or changes are made to your web browser, pop-up blocker software or operating system.

Adjusting your Browser Settings



Please select your browser to find the step by step instructions:

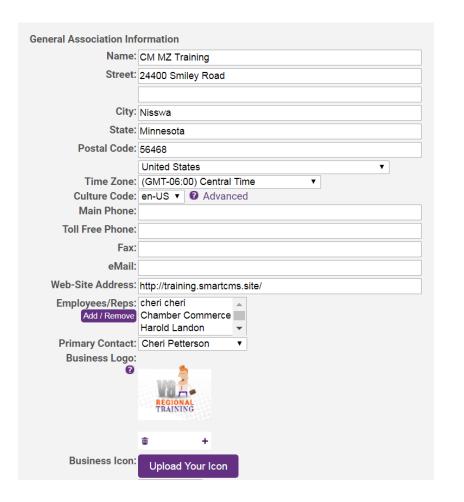
- Internet Explorer
- FireFox
- Google Chrome
- Safari

Updating Organization Information



General Association Information

- Name
- Address
- Contact Information
- Logo



Setting up Your Staff



TRN12@mailinator.com

TRN13@mailinator.com

Setting up Users & Assigning Permissions

GrowthZone support team will provide your initial login name and password for a single staff person

Additional login names and passwords may be created at your convenience under **Setup > Employees/Reps**.

Default address, phone number and email address information for each staff person are modified here as well

Organization Management CM MZ Training List of Representatives filter options 💉 entries 1 - 35 of 35 **Association Representatives Rep Name** Title **Email** Status cheri cheri Active **Chamber Commerce** Active info@chamber.com Inactive iames@mailinator.com Harold Landon Active **Harry Landon** Active **Greg Lansonne** Active Active shari@strategicsolutionsforgrowth.com Cheri Petterson Active cheri.petterson@growthzone.com TRN1 TRN1 Active trn1@mailinator.com **TRN10 TRN10** Active TRN10@mailinator.com TRN11 TRN11 Active

TRN12 TRN12

TRN13 TRN13

Active

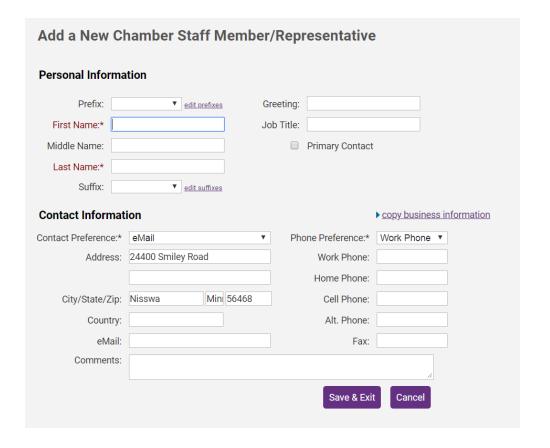
Active

Add a new staff member



Click Add New Rep

 Enter Required Fields (First Name & Last Name)

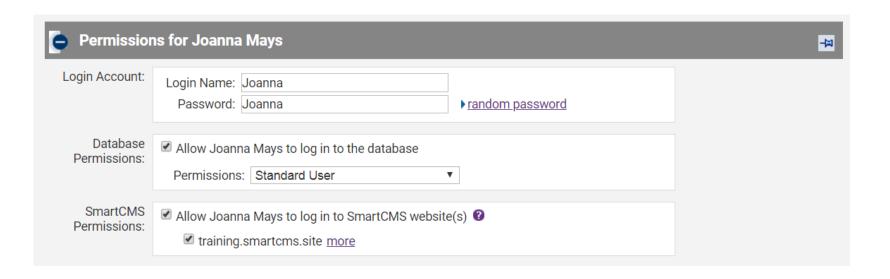


Add a new staff member



Configure Permissions

- Login Name
- Password
- Database Permissions



Setting up Your Staff



Administrator: Staff/Employee with 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: Staff/Employee with all rights except ability to modify Setup selections

Standard User: Staff/Employee with all rights except ability to modify Setup selections and access the QuickBooks or Billing menu. Standard User permissions still allow the ability to view invoice and payment activity on the members' account.

Setting up Staff



Set Email Notifications

Email Notifications (These settings are disabled because the Representative does not have Login Permissions) 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 Addresses Have Been Quarantined

Setting up Directory Categories

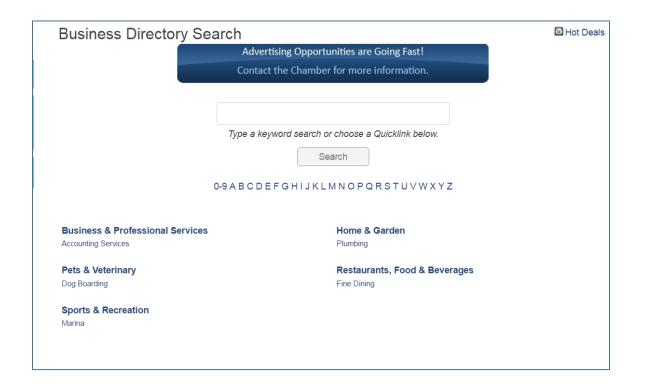


Modify Business Directory Categories

A Directory Category indicates where members will be displayed within the online directory

Categories may also be drilled down further in search results by assigning attributes

In addition, deals are also organized by the category that the member belongs to



Setting up Directory Categories



Setup > Member Options > Define Directory Categories

Directory Categories

This page allows you to add new and manage existing categories to which member businesses are allowed to belong.

Categories

There are two types of categories:

- · Categories that contain sub-categories. These categories cannot contain member businesses.
- Categories directly associated with members. These categories cannot contain subcategories.

Attributes

Attributes are a way of further categorizing your members. Attributes can allow for more granular searches on the public modules.

✓ Include only <u>Active/Courtesy</u> members in the Member Count.

Directory Categories										
Sub-Categories	Category Name	Members	QuickLink	Directory	MarketSpace	ID	remove	Actions	ns	
	American	9 members	Restaurants, Food & Beverages ▼	•	•	98		add attributes	Edit	
add sub-categories	Blogger	add members	▼	•	•	107		add attributes	<u>Edit</u>	
	Cat Boarding	1 members	Pets & Veterinary ▼	•	•	101		add attributes	Edit	
	Chinese Restaurant	1 members	Restaurants, Food & Beverages ▼	•	•	116		3 attributes	Edit	
	Consultant	add members	▼	•	•	105		2 attributes	Edit	
	Cyber Security	1 members	Computers & Telecommunications ▼	•	•	108		add attributes	Edit	
	Dog Boarding	2 members	Pets & Veterinary ▼	•	•	96		add attributes	<u>Edit</u>	
	Fishing Supplies	5 members	Sports & Recreation ▼	•	•	100		add attributes	<u>Edit</u>	
ter.com/directory/ind	dekjist?tabset=1	7 members	Home & Garden ▼	•		95		6 attributes	Edit	

Membership Types



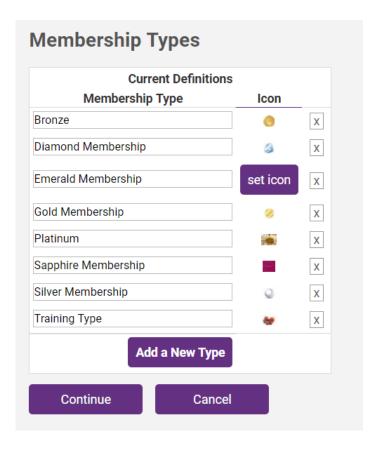
Membership Types

Reporting

Filtering

Discounts

Grouping

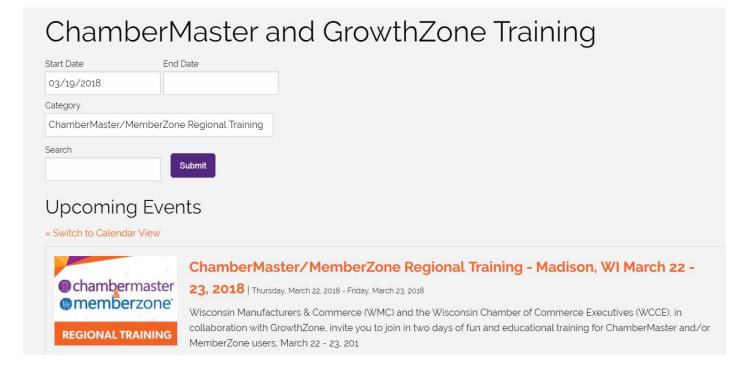


Future Training...



Check out the Training Calendar to register for your continued and future training!

- Regional Training
- Live Webinars On-line
- Recorded Training Sessions



Questions?

