ChamberMaster/MemberZone Adminstrative Setup

March 19, 2018
Agenda

• Adjusting browser settings
• Updating Organization Information
• Managing Employees and Reps
• Setting up and using the Online Member Application
• Managing Business Categories
• Updating 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

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.
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

![Permissions for Joanna Mays](image-url)
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

Additional Settings for Joanna Mays

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
Working with Staff Permissions

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

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.
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

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### 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 allow for more granular searches on the public modules.

Include only Active/Courtesy members in the Member Count.

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### Directory Categories Table

<table>
<thead>
<tr>
<th>Sub-Category</th>
<th>Category Name</th>
<th>Members</th>
<th>QuickLink</th>
<th>Directory</th>
<th>MarketSpace</th>
<th>ID</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>American</td>
<td></td>
<td>9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blogger</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cat Boarding</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chinese Restaurant</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consultant</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cyber Security</td>
<td></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dog Boarding</td>
<td></td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fishing Supplies</td>
<td></td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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*add sub-categories Add members*
Membership Types

- Reporting
- Filtering
- Discounts
- Grouping
Setting up the Member Application

• A custom membership application may be integrated with your website so that applicants may complete the form online.
Setting up the Member Application

Click Setup > Membership Options > Define Membership Packages
# Setting up the Member Application

## Member Application Form Setup

### Packages

<table>
<thead>
<tr>
<th>Package Type</th>
<th>Display?</th>
<th>Order</th>
<th>Type</th>
<th>Fee</th>
<th>Tax Set</th>
<th>Membership Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bronze Membership Package</td>
<td>Yes</td>
<td>0</td>
<td>Fee Items</td>
<td>1000.00</td>
<td></td>
<td>Bronze</td>
</tr>
<tr>
<td>New Training Package</td>
<td>Yes</td>
<td>0</td>
<td>Fee Items</td>
<td>1000.00</td>
<td></td>
<td>Training Type</td>
</tr>
<tr>
<td>Training</td>
<td>Yes</td>
<td>0</td>
<td>Fee Items</td>
<td>2500.00</td>
<td></td>
<td>Diamond Membership</td>
</tr>
<tr>
<td>Silver Membership Package</td>
<td>Yes</td>
<td>1</td>
<td>Fee Items</td>
<td>750.00</td>
<td></td>
<td>Silver Membership</td>
</tr>
<tr>
<td>Gold Membership Package</td>
<td>Yes</td>
<td>2</td>
<td>Fee Items</td>
<td>1000.00</td>
<td></td>
<td>Gold Membership</td>
</tr>
</tbody>
</table>

## Add New Package

### Add Package

- **Package name:**
- **Description:**
- **Display Package?**
- **Display Order:**
- **Membership Type:**
- **Fee Type:**
- **Tax Set:**
- **Fee amount:**

### Add Package Details

- **Package name:**
- **Description:**
- **Display Package?**
- **Display Order:**
- **Membership Type:**
- **Fee Type:**
- **Tax Set:**
- **Fee amount:**
Setting up the Member Application

• Package Add-ons are items that would be in addition to a membership package

<table>
<thead>
<tr>
<th>Name</th>
<th>Display?</th>
<th>Order</th>
<th>Type</th>
<th>Fee</th>
<th>Required?</th>
<th>TaxSet</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/4 Page Ad</td>
<td>Yes</td>
<td>0</td>
<td>Fee Items</td>
<td>100.00</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>1/4 Page Ad in Chamber Magazine</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brick at Veteran’s Park</td>
<td>Yes</td>
<td>0</td>
<td>Fee Items</td>
<td>50.00</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>honor the veterans and show your</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>support</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Training Add-on</td>
<td>Yes</td>
<td>0</td>
<td>Fee Items</td>
<td>100.00</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>New Training Add-on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsorship of Fishing Contest</td>
<td>Yes</td>
<td>0</td>
<td>Fee Items</td>
<td>75.00</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Sponsorship of Fishing Contest</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Setting up the Member Application

• You can change the visibility of field:
  • Hidden fields won't show on the online application screen
  • Optional fields will be displayed but don't have to be used
  • Required fields will be displayed and must be filled in
Setting up the Member Application

• This tab allows you to select the Custom Fields you want to display on your application
  • Hidden fields won't show on the online application screen
  • Optional fields will be displayed but don't have to be used
  • Required fields will be displayed and must be filled in
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?