

# ChamberMaster/MemberZone Administrative 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

General Association Information

Name:

Street:

City:

State:

Postal Code:

Time Zone:

Culture Code:  [Advanced](#)

Main Phone:

Toll Free Phone:


Fax:

eMail:

Web-Site Address:

Employees/Reps:   
[Add / Remove](#)

Primary Contact:

Business Logo: 

Business Icon: [Upload Your Icon](#)

# 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

### Organization Management

#### CM MZ Training

List of Representatives <span>filter options</span>				
entries 1 - 35 of 35				
Association Representatives				
check all clear all	Rep Name	Status	Title	Email
<input checked="" type="checkbox"/>	<a href="#">cheri cheri</a>	Active		
<input type="checkbox"/>	<a href="#">Chamber Commerce</a>	Active		<a href="mailto:info@chamber.com">info@chamber.com</a>
<input type="checkbox"/>	<a href="#">John James</a>	Inactive		<a href="mailto:james@mailinator.com">james@mailinator.com</a>
<input type="checkbox"/>	<a href="#">Harold Landon</a>	Active		
<input type="checkbox"/>	<a href="#">Harry Landon</a>	Active		
<input type="checkbox"/>	<a href="#">Greg Lansonne</a>	Active		
<input type="checkbox"/>	<a href="#">Shari Pash</a>	Active		<a href="mailto:shari@strategicsolutionsforgrowth.com">shari@strategicsolutionsforgrowth.com</a>
<input type="checkbox"/>	<a href="#">Cheri Petterson</a>	Active		<a href="mailto:cheri.petterson@growthzone.com">cheri.petterson@growthzone.com</a>
<input type="checkbox"/>	<a href="#">TRN1 TRN1</a>	Active		<a href="mailto:trn1@mailinator.com">trn1@mailinator.com</a>
<input type="checkbox"/>	<a href="#">TRN10 TRN10</a>	Active		<a href="mailto:TRN10@mailinator.com">TRN10@mailinator.com</a>
<input type="checkbox"/>	<a href="#">TRN11 TRN11</a>	Active		
<input type="checkbox"/>	<a href="#">TRN12 TRN12</a>	Active		<a href="mailto:TRN12@mailinator.com">TRN12@mailinator.com</a>
<input type="checkbox"/>	<a href="#">TRN13 TRN13</a>	Active		<a href="mailto:TRN13@mailinator.com">TRN13@mailinator.com</a>

# Add a new staff member

## Click Add New Rep

- Enter Required Fields (First Name & Last Name)

**Add a New Chamber Staff Member/Representative**

**Personal Information**

Prefix:  [edit prefixes](#) Greeting:

First Name:\*  Job Title:

Middle Name:  ☐ Primary Contact

Last Name:\*

Suffix:  [edit suffixes](#)

**Contact Information** [copy business information](#)

Contact Preference:\*  eMail Phone Preference:\*  Work Phone

Address:  24400 Smiley Road Work Phone:

City/State/Zip:  Nisswa  Min  56468 Home Phone:

Country:  Cell Phone:

eMail:  Alt. Phone:



Fax:

Comments:

# Add a new staff member

## Configure Permissions

- Login Name
- Password
- Database Permissions

 **Permissions for Joanna Mays** 

Login Account:

Login Name:


Password:  [▶ random password](#)

Database Permissions:

☒ Allow Joanna Mays to log in to the database

Permissions:

SmartCMS Permissions:

☒ Allow Joanna Mays to log in to SmartCMS website(s) 

☒ training.smartcms.site [more](#)



## 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

Member or Rep  
 Group  
 Event

Member/Rep Look-up  
 Email Address:   
 Filter Type: Email Address  
 Match Options: Match start of email address

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

Email	Member	Representative
[not set]	1st Billing Test Member	
[not set]	2nd Billing Test Member	
[not set]	Acme Rockets	
[not set]	Allstate Insurance Agency	
[not set]	Almont Chamber Member	
[not set]	Aztec Propane	
[not set]	BarnsworthTractor and Equipmen	
[not set]	Bates Fleet Farm	

Member/Rep Information:

# 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

Business Directory Search

Hot Deals

Advertising Opportunities are Going Fast!  
Contact the Chamber for more information.

Type a keyword search or choose a Quicklink below.

Search

0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

**Business & Professional Services**  
Accounting Services

**Pets & Veterinary**  
Dog Boarding

**Sports & Recreation**  
Marina

**Home & Garden**  
Plumbing

**Restaurants, Food & Beverages**  
Fine Dining

# 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 [Active/Courtesy](#) members in the Member Count.

Directory Categories									
Sub-Categories	Category Name	Members	QuickLink	Directory	MarketSpace	ID	remove	Actions	
	American	<a href="#">9 members</a>	Restaurants, Food & Beverages ▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	98	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
<a href="#">add sub-categories</a>	Blogger	<a href="#">add members</a>	▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	107	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Cat Boarding	<a href="#">1 members</a>	Pets & Veterinary ▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	101	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Chinese Restaurant	<a href="#">1 members</a>	Restaurants, Food & Beverages ▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	116	<input type="checkbox"/>	<a href="#">3 attributes</a>	<a href="#">Edit</a>
<a href="#">add sub-categories</a>	Consultant	<a href="#">add members</a>	▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	105	<input type="checkbox"/>	<a href="#">2 attributes</a>	<a href="#">Edit</a>
	Cyber Security	<a href="#">1 members</a>	Computers & Telecommunications ▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	108	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Dog Boarding	<a href="#">2 members</a>	Pets & Veterinary ▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	96	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Fishing Supplies	<a href="#">5 members</a>	Sports & Recreation ▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	100	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Home & Garden	<a href="#">7 members</a>	▼	<input checked="" type="checkbox"/>	<input type="checkbox"/>	95	<input type="checkbox"/>	<a href="#">6 attributes</a>	<a href="#">Edit</a>








aster.com/directory/index.jsp?tabset=1

# Membership Types

## Membership Types

- Reporting
- Filtering
- Discounts
- Grouping

### Membership Types

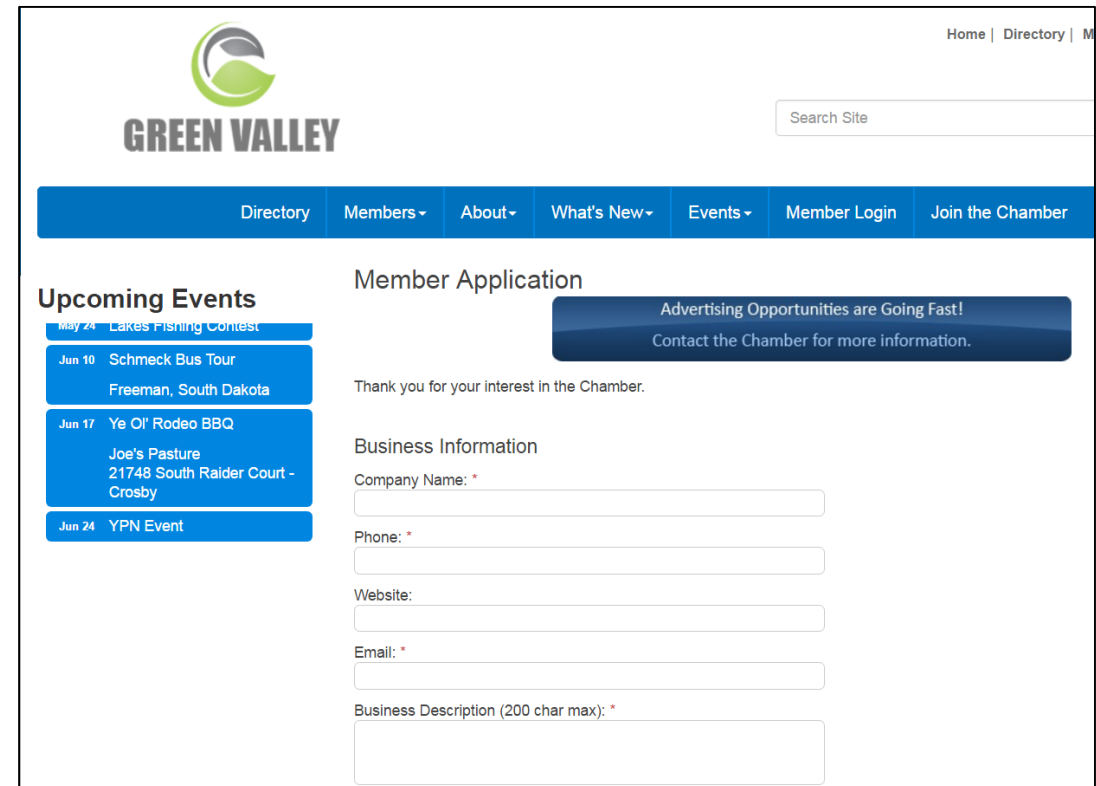
Current Definitions		
Membership Type	Icon	
Bronze		X
Diamond Membership		X
Emerald Membership	set icon	X
Gold Membership		X
Platinum		X
Sapphire Membership		X
Silver Membership		X
Training Type		X

Add a New Type

Continue
Cancel

# Setting up the Member Application

- A custom membership application may be integrated with your website so that applicants may complete the form online



The screenshot shows the Green Valley website interface. At the top, there is a logo for Green Valley and a navigation bar with links: Home, Directory, Members, About, What's New, Events, Member Login, and Join the Chamber. A search bar is also present. The main content area is divided into two columns. The left column, titled 'Upcoming Events', lists four events: May 24 Lakes Fishing Contest, Jun 10 Schmeck Bus Tour (Freeman, South Dakota), Jun 17 Ye Ol' Rodeo BBQ (Joe's Pasture, 21748 South Raider Court - Crosby), and Jun 24 YPN Event. The right column, titled 'Member Application', features a blue button that says 'Advertising Opportunities are Going Fast! Contact the Chamber for more information.' Below this, a message reads 'Thank you for your interest in the Chamber.' The 'Business Information' section contains several input fields: Company Name (required), Phone (required), Website, Email (required), and Business Description (200 char max, required).

# Setting up the Member Application

Click Setup > Membership Options > Define Membership Packages

Member Application Form Setup

General Packages Package Add-ons Optional Fields Custom Fields

**General**

- ☒ Enable Member Application Form
- ☒ Send Automatic 'Thank You' Email

**Payment Options ?**

- ☒ Accept 'Bill Me' Payments
- ☒ Accept Credit Card Payments
- ☒ Auto-approve applications paid by Credit Card
- ☒ Auto-create paid invoice or receipt

**Custom Text ?**

Introduction:

'Thank You':

Save Cancel



# Setting up the Member Application

Member Application Form Setup

General

Packages

Package Add-ons

Optional Fields

Custom Fields

Feedback

Add New Package

Packages

Name	Display?	Order	Type	Fee	TaxSet	Membership Type
<b>Bronze Membership Package</b> basic membership discounted pricing on events business category listing on directory	Yes	0	Fee Items	1000.00		Bronze
<b>New Training Package</b>	Yes	0	Fee Items	1000.00		Training Type
<b>Training</b> Amazing package	Yes	0	Fee Items	25000.00		Diamond Membership
<b>Silver Membership Package</b> A listing on the Chamber website with a link to your own website or e-mail address A plaque that shows your support of the community Monthly eNewsletter Networking opportunities (over 100 events per year).	Yes	1	Fee Items	750.00		Silver Membership
<b>Gold Membership Package</b> All of the Standard Membership Benefits Photo Gallery/Video on the Chamber Website Map Location on the Chamber Website	Yes	2	Fee Items	1000.00		Gold Membership

Add Package

Package name:

Description:

Display Package?

☐

Display Order:

0

Membership Type:

(none)

Fee Type:

Fee

Tax Set:

(none)

Fee amount:









0

Save

Cancel

# Setting up the Member Application

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

General Packages <u>Package Add-ons</u> Optional Fields Custom Fields						
Add New Package Add-on						
Package Add-ons						
Name	Display?	Order	Type	Fee	Required?	TaxSet
<b>1/4 Page Ad</b> 1/4 Page Ad in Chamber Magazine	Yes	0	Fee Items	100.00	No	 
<b>Brick at Veteran's Park</b> honor the veterans and show your support	Yes	0	Fee Items	50.00	No	 
<b>New Training Add-on</b> New Training Add-on	Yes	0	Fee Items	100.00	No	 
<b>Sponsorship of Fishing Contest</b> Sponsorship of Fishing Contest	Yes	0	Fee Items	75.00	No	 

# 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

**Member Application Form Setup**

General Packages Package Add-ons **Optional Fields** Custom Fields

**General ?**

Option	Visibility
Show Primary Contact	Required ▼
Show Billing Contact	Required ▼

**Member Section**

Option	Visibility
Phone	Required ▼
Physical Address	Required ▼
Mailing Address	Optional ▼
Email	Required ▼
Description	Optional ▼
Keywords	Optional ▼
Website	Optional ▼
Directory Category	Optional ▼
Employee Count	Optional ▼
Comments/Questions	Optional ▼
Social Networks	Hidden ▼

**Primary/Billing Contact Section**

Option	Visibility
Login Name & Password	Required ▼
Address	Required ▼
Phone Number	Required ▼
Cell Phone Number	Optional ▼
Fax Number	Optional ▼
Email	Required ▼
Social Networking	Hidden ▼
Title	Optional ▼

# 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

**Member Application Form Setup**

[General](#) [Packages](#) [Package Add-ons](#) [Optional Fields](#) [Custom Fields](#)

**Custom Fields**

Field Name	Order	Visibility
Reason for Joining?	0	Required ▼
Want to Volunteer?	1	Required ▼
Are you interested in educational opportunities?	2	Hidden ▼
Do you want a ribbon cutting?	3	Hidden ▼
Ownership	4	Required ▼

[Save](#) [Cancel](#)

## Future Training...

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

- [Regional Training](#)
- [Live Webinars On-line](#)
- [Recorded Training Sessions](#)

### ChamberMaster and GrowthZone Training

Start Date	End Date
<input type="text" value="03/19/2018"/>	<input type="text"/>
Category	
<input type="text" value="ChamberMaster/MemberZone Regional Training"/>	
Search	
<input type="text"/>	<input type="button" value="Submit"/>

#### Upcoming Events

[« Switch to Calendar View](#)



#### **ChamberMaster/MemberZone Regional Training - Madison, WI March 22 - 23, 2018** | Thursday, March 22, 2018 - Friday, March 23, 2018

Wisconsin Manufacturers & Commerce (WMC) and the Wisconsin Chamber of Commerce Executives (WCCE), in collaboration with GrowthZone, invite you to join in two days of fun and educational training for ChamberMaster and/or MemberZone users, March 22 - 23, 2018.

# Questions?