

# ChamberMaster/MemberZone Member Management - The Basics



## Members Module Overview

## Finding Members

## Managing Members

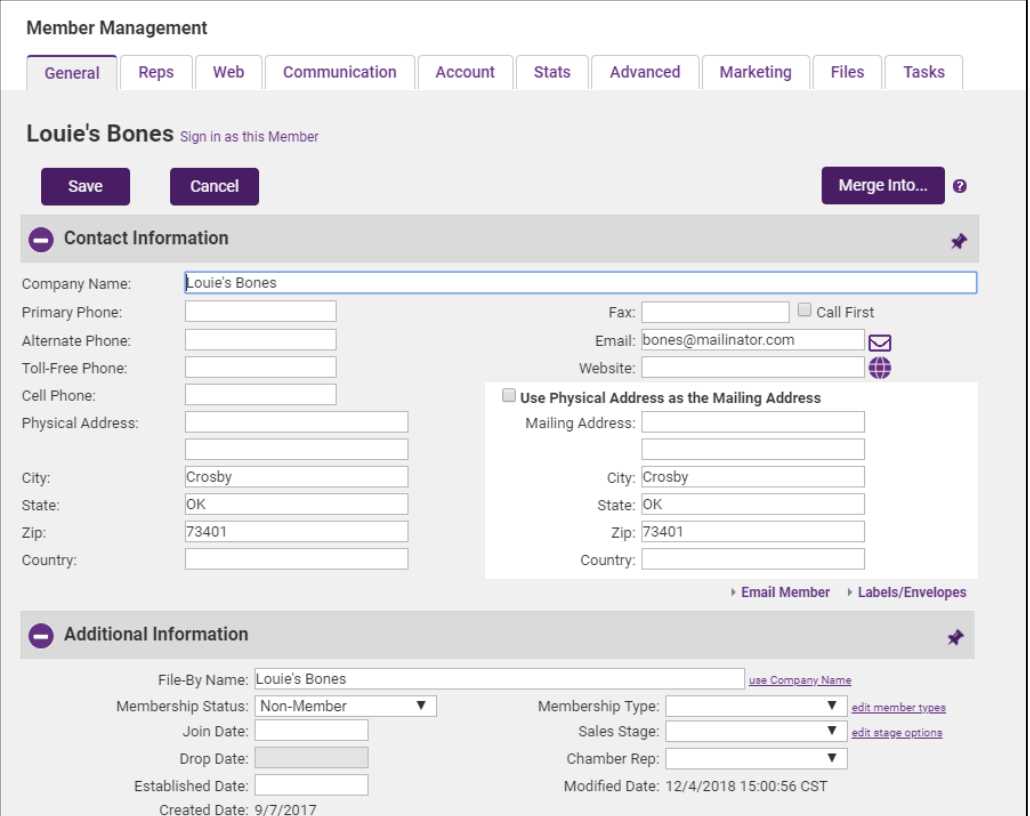
- Add member/rep record
- Drop member
- Reinstate a member
- Merge Members

## The Community member

## 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.



The screenshot shows the 'Member Management' interface for a member named 'Louie's Bones'. The interface has a top navigation bar with tabs: General, Reps, Web, Communication, Account, Stats, Advanced, Marketing, Files, and Tasks. The 'General' tab is selected. Below the tabs, the member's name 'Louie's Bones' is displayed with a 'Sign in as this Member' link. There are 'Save', 'Cancel', and 'Merge Into...' buttons. The 'Contact Information' section is expanded, showing fields for Company Name (Louie's Bones), Primary Phone, Alternate Phone, Toll-Free Phone, Cell Phone, Physical Address, City (Crosby), State (OK), Zip (73401), and Country. There are also fields for Fax, Email (bones@mailinator.com), and Website. A checkbox 'Use Physical Address as the Mailing Address' is checked, and the mailing address fields are populated with the same information as the physical address. Below this, there are links for 'Email Member' and 'Labels/Envelopes'. The 'Additional Information' section is also expanded, showing fields for File-By Name (Louie's Bones), Membership Status (Non-Member), Join Date, Drop Date, Established Date, Membership Type, Sales Stage, Chamber Rep, and Modified Date (12/4/2018 15:00:56 CST). The 'Created Date' is 9/7/2017.

# Member Module Overview

- **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 Management**

GeneralRepsWebCommunicationAccountStatsAdvancedMarketingFilesTasks

**Louie's Bones** [Sign in as this Member](#)

**Member Correspondence**

Filter Options

Date From: 1/7/2018Through: 1/7/2019Member Rep: Tasks/Categories: Staff Contact:

☒ Display **bulk mail** correspondence entries in the table below.

Display 10 results per page.

Refresh ListingClear FiltersNew CommunicationReports

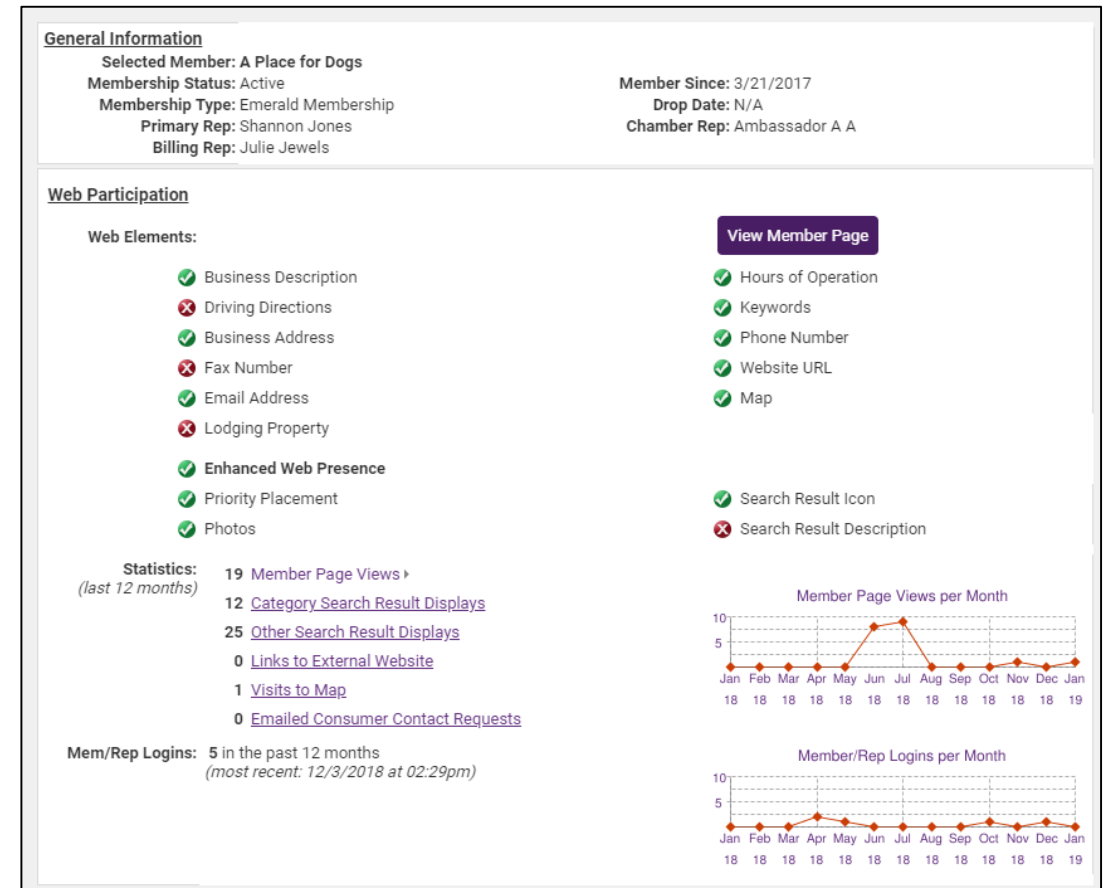
Email dates listed below are based on the date sent from the Central time zone server (GMT-06:00). Click into the email to view the date/time in your own time zone.

entries 1 - 1 of 1

Correspondence History					
Subject	Date	Follow-Up	Task	Contact	Association Rep
<a href="#">Create your Login today!</a>	10/10/2018	<a href="#">add follow-up</a>		<a href="#">68 recipients</a>	Train34 Train34

# 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



# Member Module Overview


- **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](#)

A Place for Dogs [Sign in as this Member](#)

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

[- Sponsorship Options/Enhancements](#) [+](#)

Sponsorship Banner Ads				
Action	Expires	Context	Image	
<a href="#">edit</a>	1/7/2019 - 1/30/2019	<a href="#">Dog Boarding</a> <a href="#">Pets &amp; Veterinary</a>		<a href="#">X</a>

[Add Banners](#)

Priority Placement:  (relative to other members in the same directory category: 10=basic, 30=enhanced)

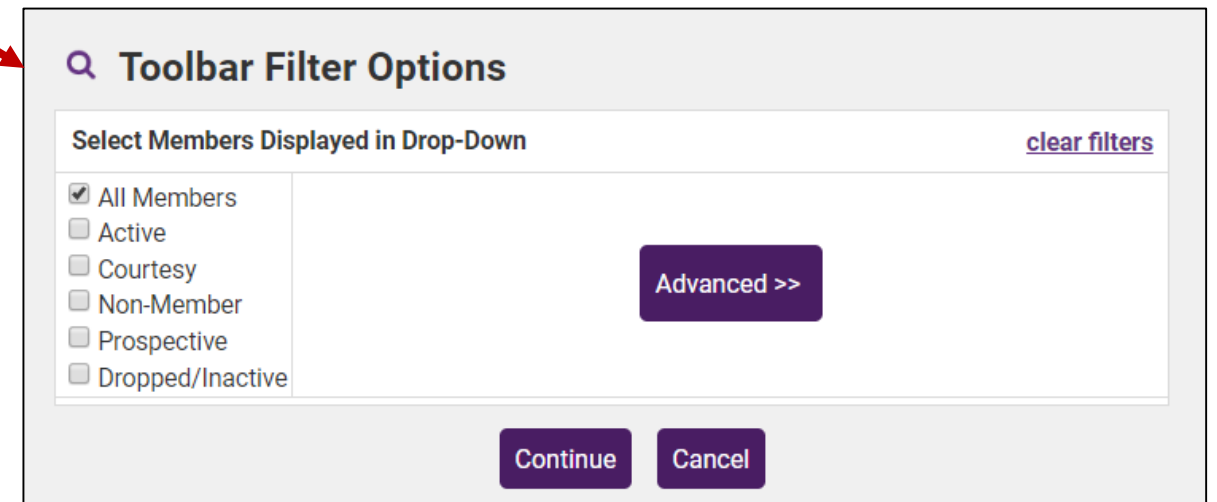
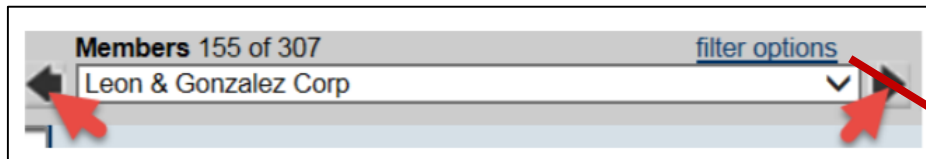
Google Tag Manager Container ID:

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

# Member Filtering Options

## Member Drop Down Options and Filters:

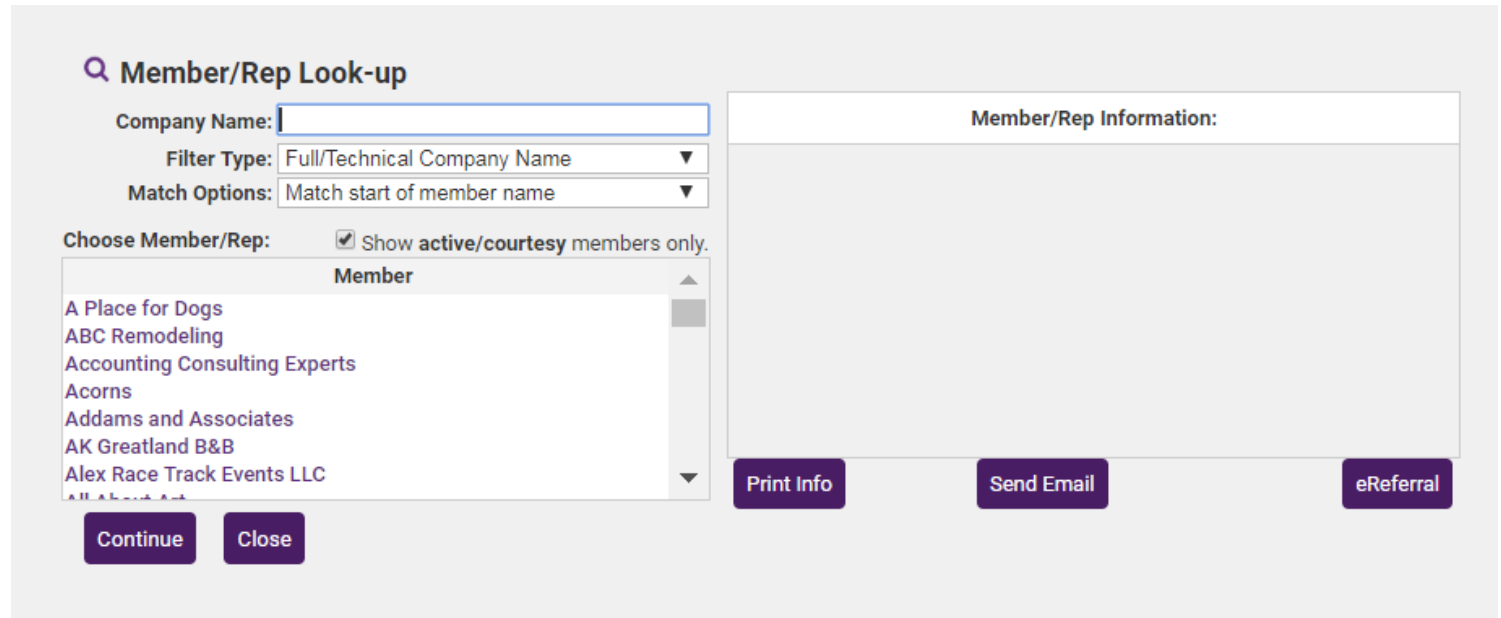
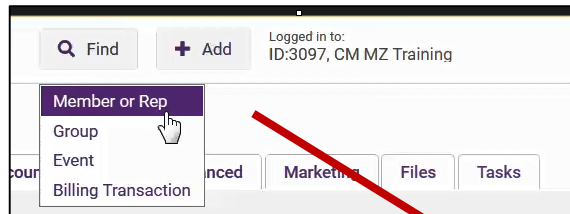
- In the Header Bar black arrows move through the list of members
- Filter Options
- WIKI: [Find A Member](#)



# 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

WIKI: [Find a Member](#)



**Member/Rep Look-up**

Company Name:

Filter Type:

Match Options:

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

**Member**

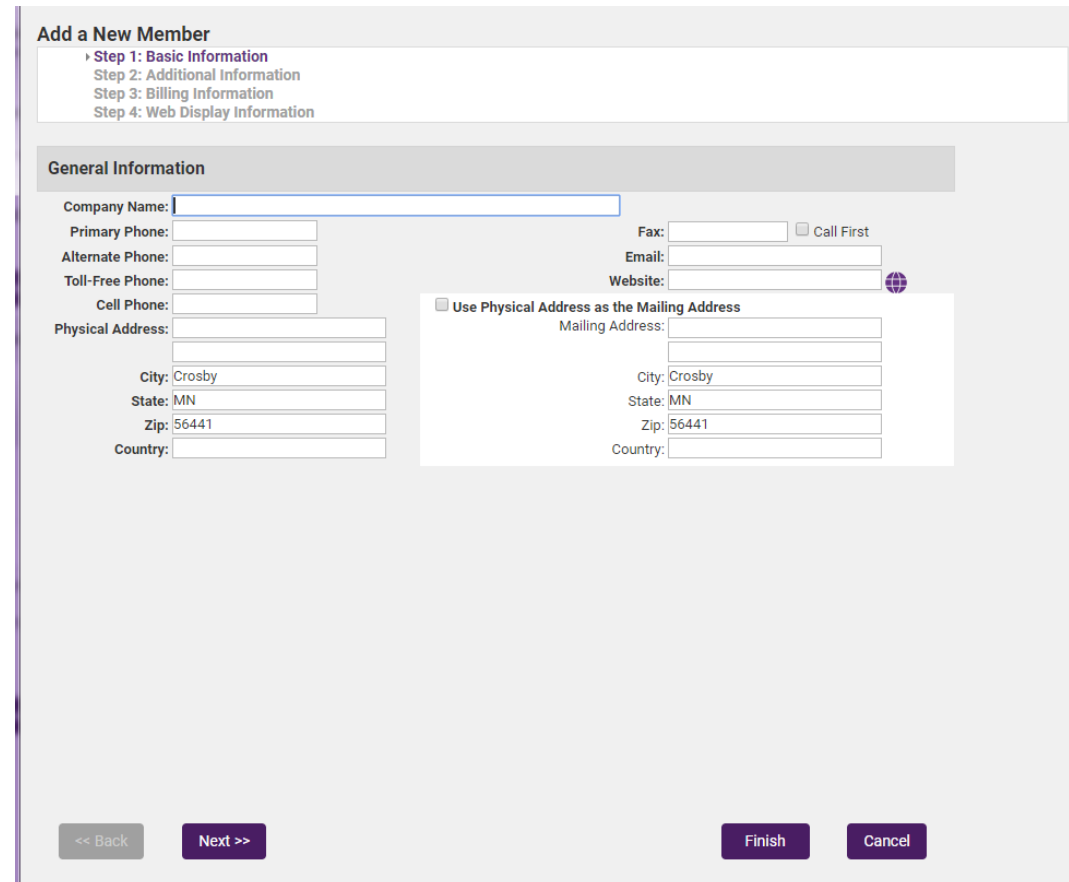
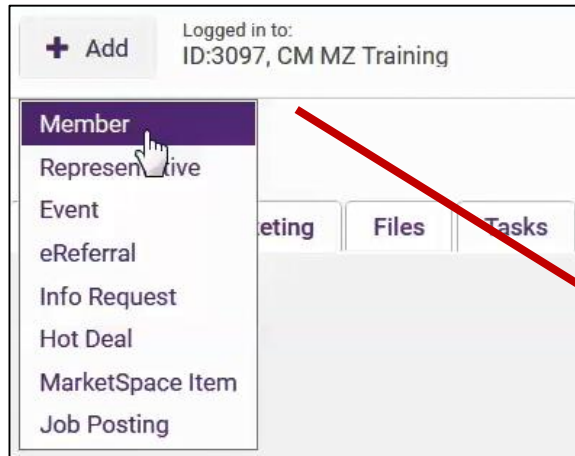
- A Place for Dogs
- ABC Remodeling
- Accounting Consulting Experts
- Acorns
- Addams and Associates
- AK Greatland B&B
- Alex Race Track Events LLC
- All About Art

**Member/Rep Information:**



# Add Button

The add button allows you to add information easily from where ever you are in the database.



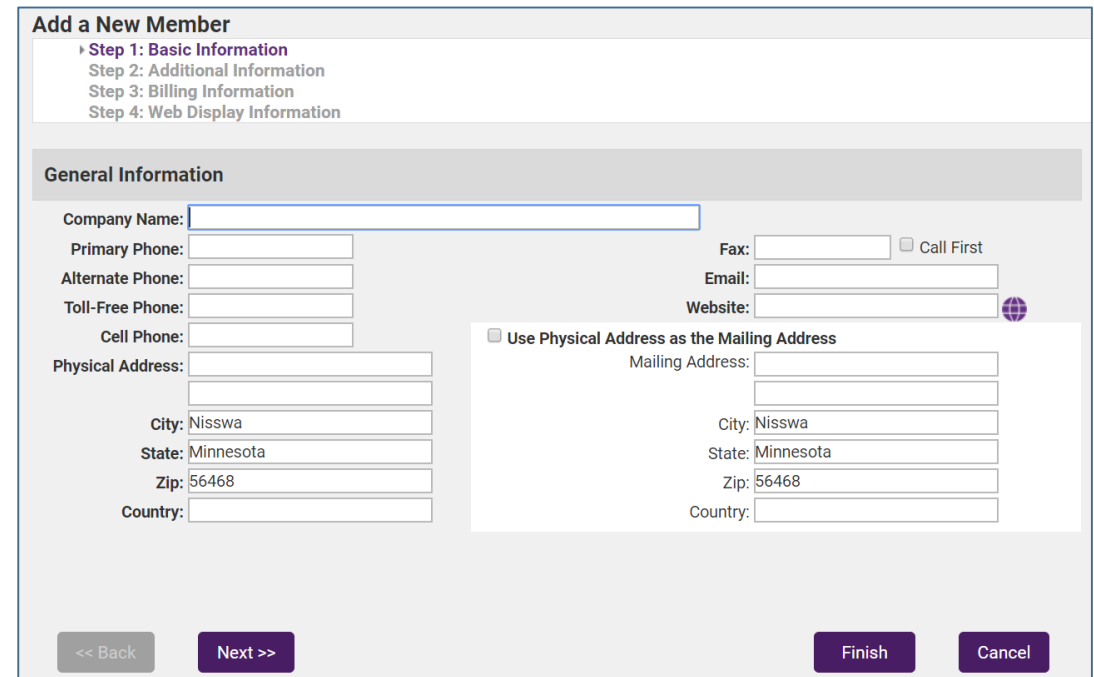
This screenshot shows the 'Add a New Member' form. The form is titled 'Add a New Member' and has four steps: Step 1: Basic Information, Step 2: Additional Information, Step 3: Billing Information, and Step 4: Web Display Information. The 'General Information' section is currently active. It contains several input fields: Company Name, Primary Phone, Alternate Phone, Toll-Free Phone, Cell Phone, Physical Address, City, State, Zip, and Country. There are also fields for Fax, Email, and Website. A checkbox labeled 'Use Physical Address as the Mailing Address' is present, with a 'Mailing Address' section below it. At the bottom of the form, there are buttons for '<< Back', 'Next >>', 'Finish', and 'Cancel'.

# 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:

Alternate Phone:

Toll-Free Phone:

Cell Phone:

Physical Address:

City: Nisswa

State: Minnesota

Zip: 56468

Country:

Fax:  ☐ Call First

Email:

Website:

☐ Use Physical Address as the Mailing Address

Mailing Address:

City: Nisswa

State: Minnesota

Zip: 56468

Country:

<< Back   Next >>   Finish   Cancel

# Merge member records – Admin only option

## WIKI: [Merge Members](#)

**Member - Merge**

**Floral Design**

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 **Floral Design** or **Flowery Branch Farm**.  
The currently selected value is highlighted in green.

After the merge is complete, please review Reps, Account, Advanced, and Marketing tabs to disable or delete any duplicate information if necessary.

Field	Source Record Floral Design (Created: 5/16/2017):	Destination Record Flowery Branch Farm (Created: 10/25/2017):	New Destination Record Merged Value
<b>Contact Fields</b>			
Company Name	Floral Design	Flowery Branch Farm	Flowery Branch Farm
Email	flo@mailinator.com		
File-By Name	Floral Design	Flowery Branch Farm	Flowery Branch Farm
Primary Phone		(770) 559-8251	(770) 559-8251
Website		http://flowerbranchfarm.com	http://flowerbranchfarm.com
<b>Physical Address Fields</b>			
City	Crosby	Newnan	Newnan
Address Line 1	21748 S Raider Court	123 Flowery Branch Road	123 Flowery Branch Road
Postal Code	56441	30265	30265
State/Province	MN	GA	GA
<b>Mailing Address Fields</b>			
City	Nisswa	Newnan	Newnan
Country		US	US
Address Line 1	21748 S Raider Court	123 Flowery Branch Road	123 Flowery Branch Road
Postal Code	56468	30265	30265
State/Province	MN	GA	GA
<b>Display Fields</b>			

# 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: 6/12/18

Drop Reason:

Drop Details:

Representatives

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

Billing Information

Current Balance: \$800.00

Recurring Membership Dues & Fees

<div>check all uncheck all</div>	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:

☐ Do Not Display On Web

☐ Disable Login

☐ No Web Link on Member Page

☐ Cannot Purchase Ads/HotDeals

☐ Disable Member Info Page

☐ 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](#)

Greeting:

First Name:

Job Title:

Middle Name:

☒ Primary Contact

Last Name:

Phone Preference:

Suffix:  [edit suffixes](#)

Work Phone:

Contact Preference:

Home Phone:

Address:

Cell Phone:

City:

Alt. Phone:

State:

Fax:

Zip:

Country:

eMail:

Comments:

# Common Member Reports

Member Join Reports

Member Drop Analysis Report

Custom Member Report

Custom Representative Report

### Member Listing by Join Date

Sales Rep: - Do Not Filter by Sales Rep - ▾

Join Date from: 12/21/2017

to: 1/7/2019

Display Options: Summary ▾

Include Active Members Only?: Yes ▾

Show Totals: Yes ▾

Include One-Time Fees: No ▾

Use Fee Active and Exp. Dates in Criteria: No ▾


Include Web Tab Description: No ▾

Member Name Option: Use "CompanyName" ▾

Sort Option: By Join Date ▾

Refresh Report

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?

