ChamberMaster/MemberZone Member Management – The Basics

GrowthZone
smarter association software

Agenda

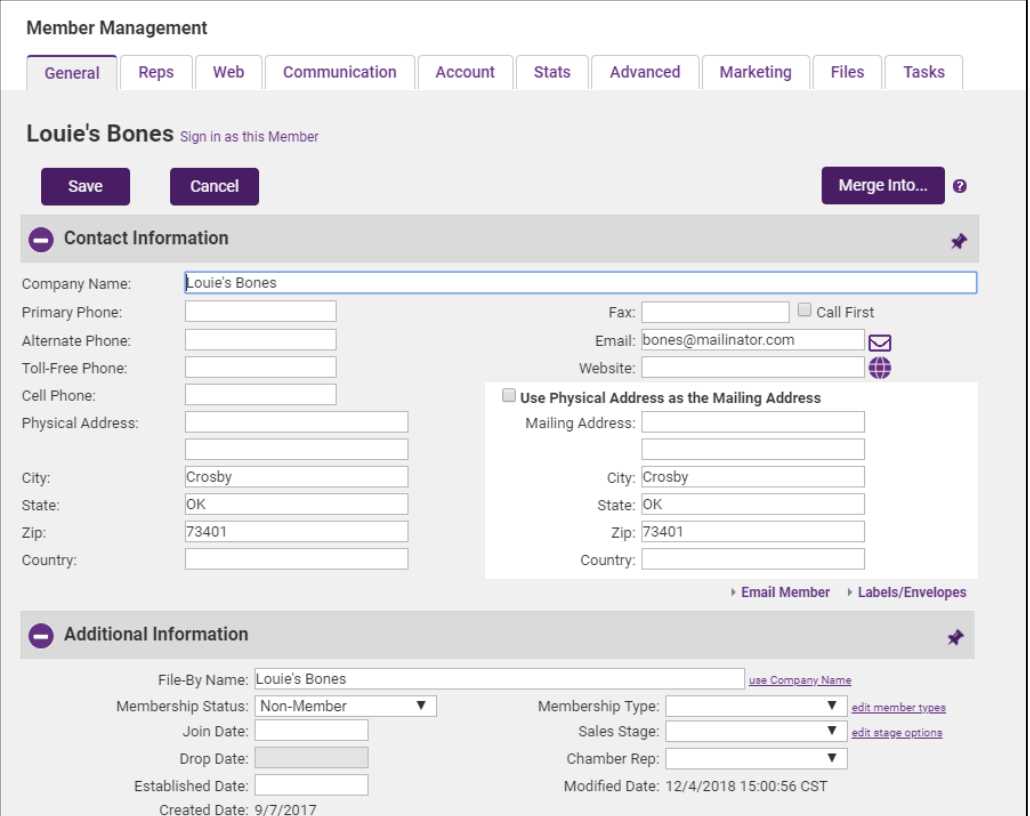Members Module Overview

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.

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 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
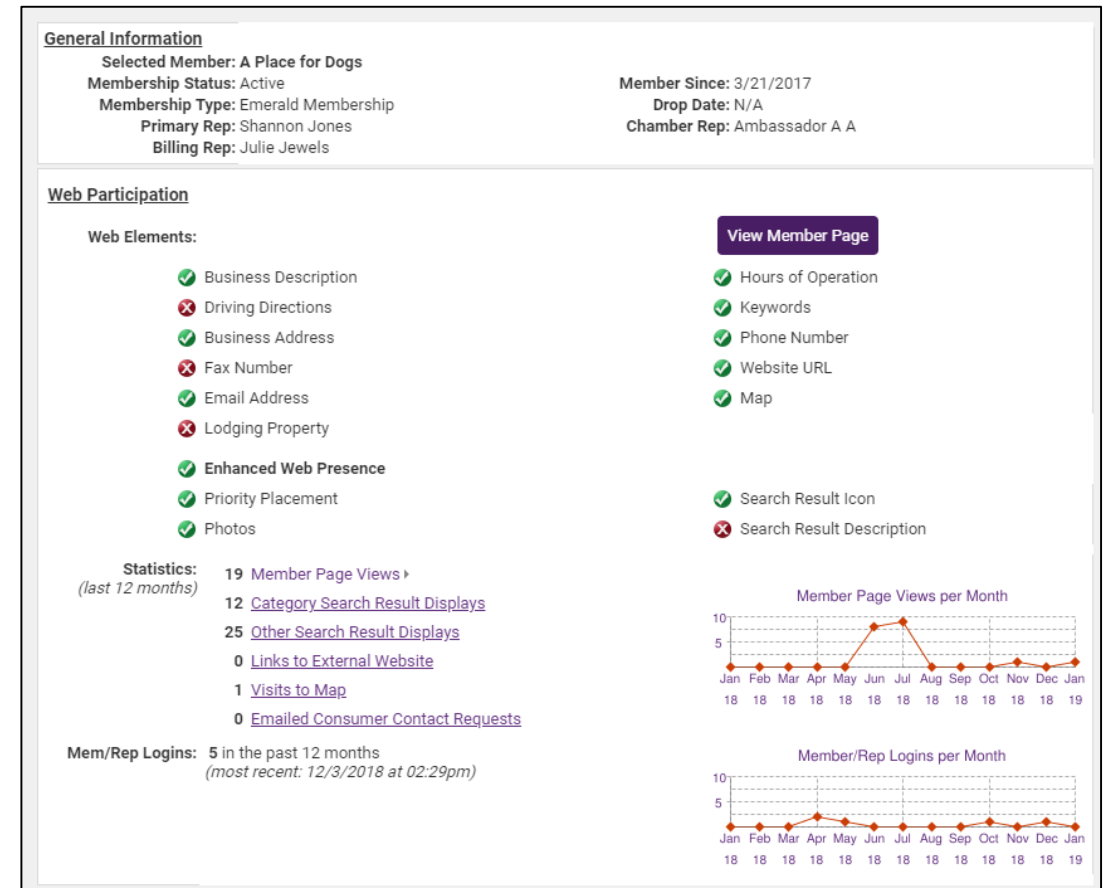
Member Module Overview

- **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**

Member Filtering Options
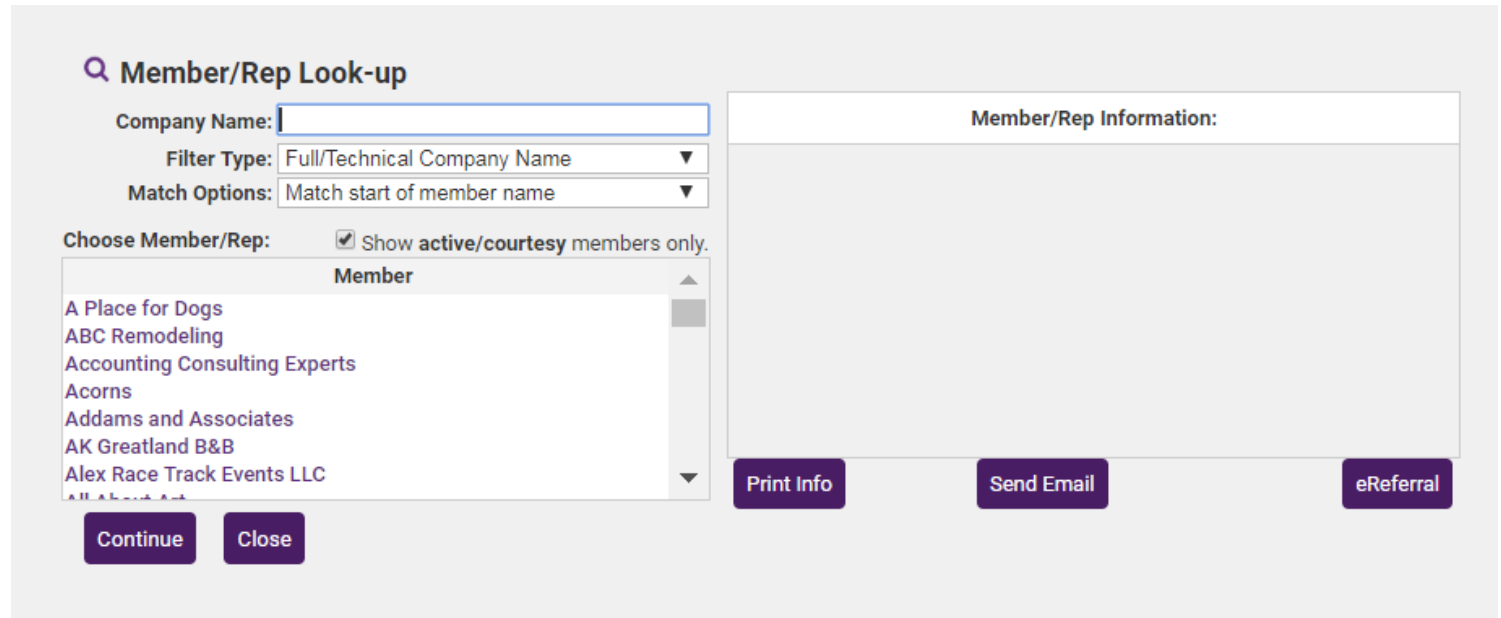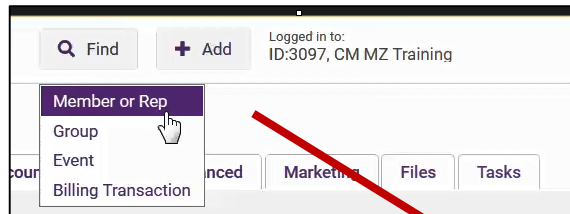
Member Drop Down Options and Filters:

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

- Filter Options

- WIKI: <u>Find A Member</u>
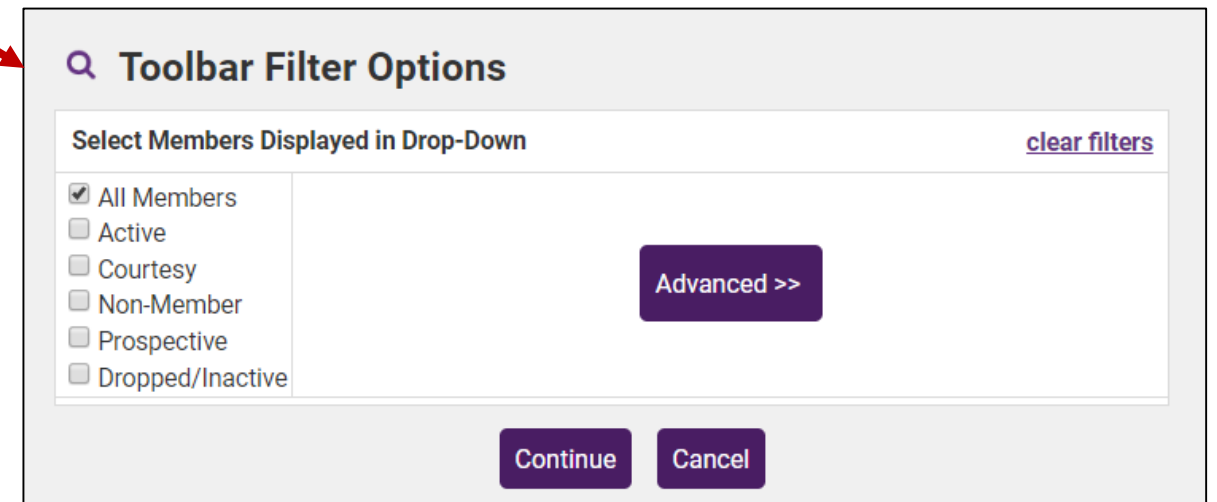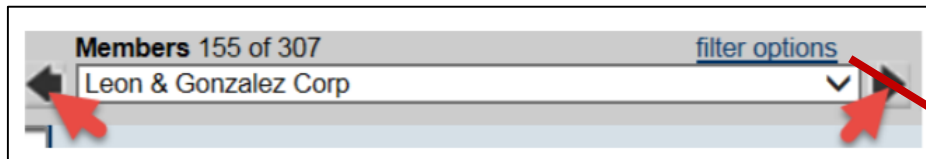
Find a Member/Rep

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
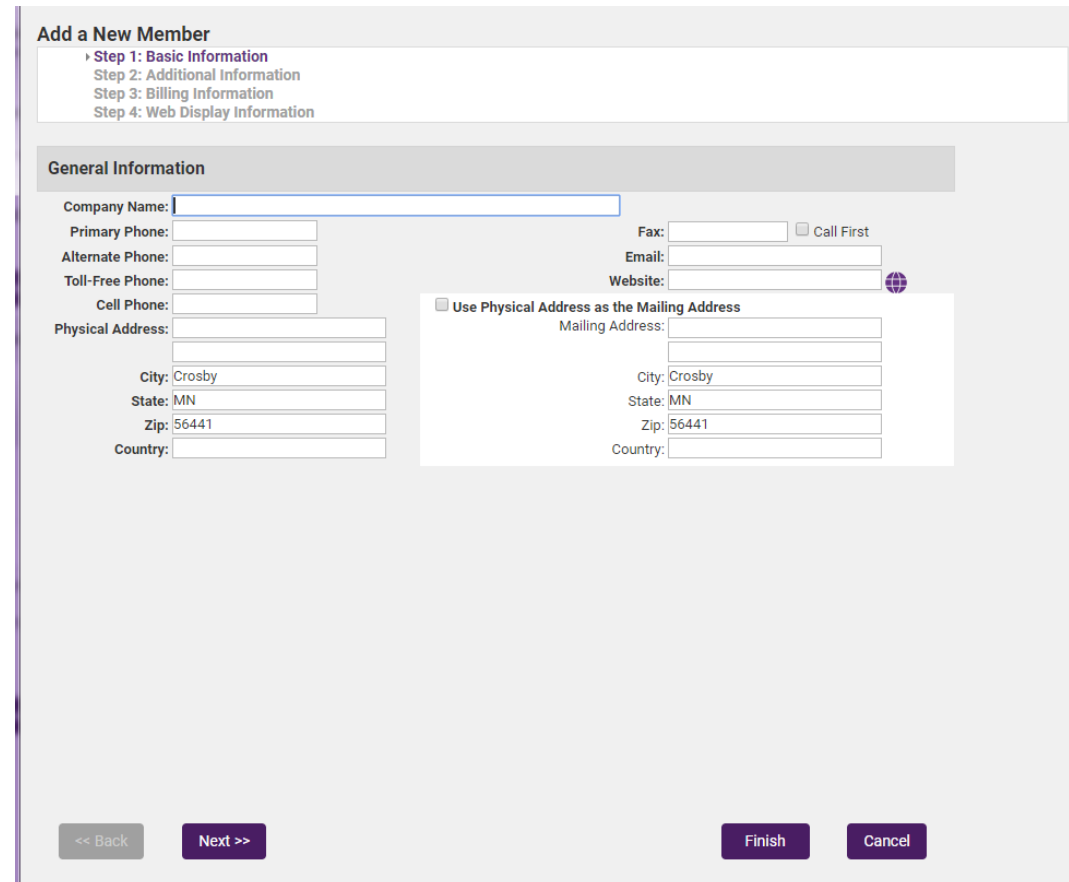
Add Button

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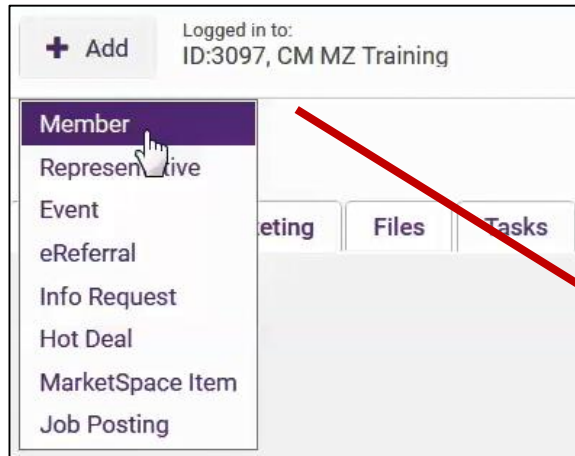
Add a Member

WIKI: [Add a Member](#)

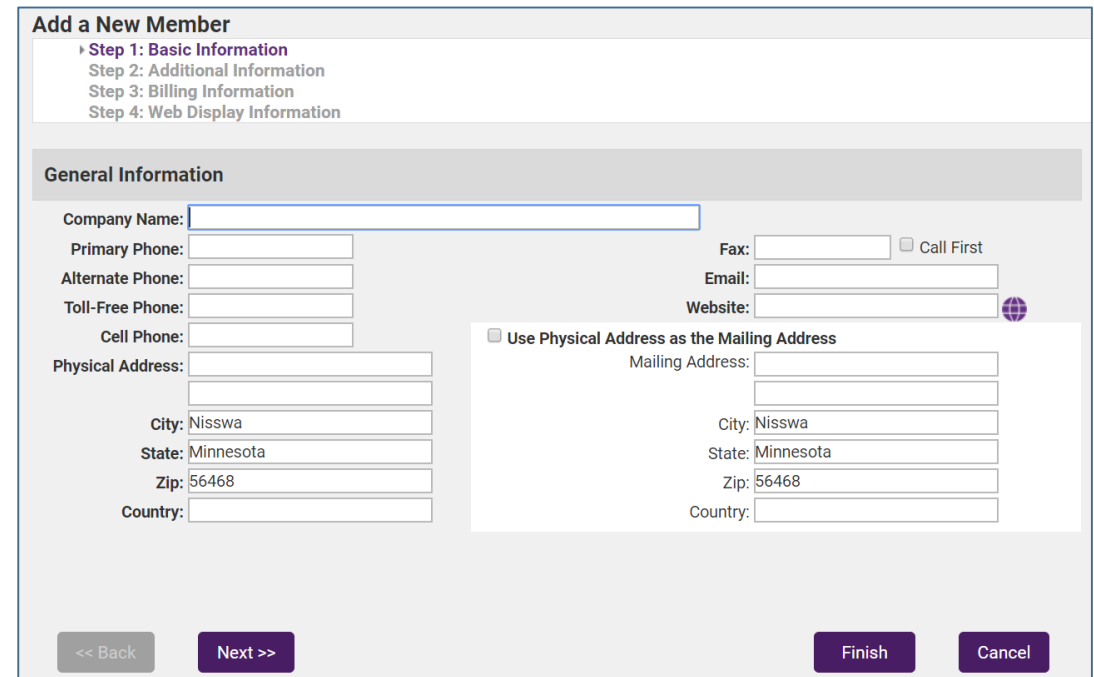When adding a new member to the database, you simply fill in the requested information as the wizard walks you through four information screens. You will be asked to fill in the following information screens:

- General Information
- Additional Information
- Billing Information
- Web Display Information

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.

[Merge] [Cancel]

Field	Source Record Floral Design (Created: 5/16/2017):	Destination Record Flowery Branch Farm (Created: 10/25/2017):	New Destination Record Merged Value
Contact Fields			
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
Physical Address Fields			
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
Mailing Address Fields			
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
Display Fields			

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.

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

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

Common Member Reports

Member Join Reports

Member Drop Analysis Report

Custom Member Report

Custom Representative Report