

# ChamberMaster/MemberZone Administrative Setup



# Agenda

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- 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

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:

# 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 filter options

entries 1 - 35 of 35

Association Representatives				
<small>check all clear all</small>	Rep Name	Status	Title	Email
<input 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:\*  Phone Preference:\*

Address:  Work Phone:

Home Phone:

City/State/Zip:    Cell Phone:

Country:  Alt. Phone:

eMail:  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.

## 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

# 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



The screenshot shows the 'Business Directory Search' interface. At the top right, there is a 'Hot Deals' icon. Below the title, a dark blue banner contains the text: 'Advertising Opportunities are Going Fast! Contact the Chamber for more information.' Below this is a search input field with the placeholder text 'Type a keyword search or choose a Quicklink below.' and a 'Search' button. Underneath the search field is a horizontal list of letters: '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'. Below the letters, there are four category sections, each with a bold title and a list of sub-categories: 'Business & Professional Services' (Accounting Services), 'Home & Garden' (Plumbing), 'Pets & Veterinary' (Dog Boarding), and 'Sports & Recreation' (Marina). The 'Restaurants, Food & Beverages' category is also listed with 'Fine Dining' as a sub-category.

# 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
	<input type="text" value="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>	<input type="text" value="Blogger"/>	<a href="#">add members</a>	<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	107	<input type="checkbox"/>	<a href="#">add attributes</a> <a href="#">Edit</a>
	<input type="text" value="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>
	<input type="text" value="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>	<input type="text" value="Consultant"/>	<a href="#">add members</a>	<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	105	<input type="checkbox"/>	<a href="#">2 attributes</a> <a href="#">Edit</a>
	<input type="text" value="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>
	<input type="text" value="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>
	<input type="text" value="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>
<a href="#">aster.com/directory/index.jsp?tabset=1</a>	<input type="text" value=""/>	<a href="#">7 members</a>	Home & Garden ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>	95	<input type="checkbox"/>	<a href="#">6 attributes</a> <a href="#">Edit</a>

# 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**

# 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

Category

Search

### 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?

