



Member Information Center

Setting it up

This topic covers. The time stamps will take you to that topic in the recorded workshop

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# Explanation of default settings

Setup > Member Login Area Options and Settings

## 1. Settings tab 1:12

- a. **Email addresses** – Select the level of exposure you will allow between members of their email addresses. Determine how/if member email addresses should be displayed within the Member Information Center (MIC). Note: Does not apply to deals and jobs postings.
- b. **Dashboard** - Experience member to member social networking by leaving the Community Feed enabled. In this area you can enable the Community feed or the resources area of the MIC
- c. **Searching** - Determine what filters are available in the Member Information Center (MIC) member directory and select whether to include reps in addition to members in the search results.
- d. **Additional Features** – These are additional options you can add to the MIC for your members/reps to utilize.

## 2. Permissions tab 9:40

- a. Set the maximum permissions allowed in the Member Information Center, enable/disable selections, and add custom menu choices for your members. These options will be broken down by rep type in another step.

## 3. Messages tab 5:53

- a. **Welcome Message** – This message will show on the home page and it will be the first message they will see.
- b. **Upgrade Message** – These messages will show under the Promote your business and Upgrade your listing section of the MIC. This is an opportunity to explain the features of the enhanced member page. Make sure to add an email to the Add Recipient box so your office is notified when this option is used.
- c. **Forgot Password** - Displays on your public /Login/ForgotPwd page when a user enters an email address that is not found in your database, allowing you to give instruction on what to do next.

## 4. Menu Items 7:49

- a. This area allows you to add custom links to your MIC for your members to access while they are logged in. This can be any URL that you would find helpful to them.

## 5. MIC Help 8:43

- a. These are member facing videos you can share with your reps so they can see how to update their personal and company information. You are welcome to add these to communications or enable in the MIC

## Representative Permission Sets 9:40

Reps may be limited in what they can access in the Member information Center by using permission assignments. These individual permissions are then grouped together and saved as a permission set and then assigned to a rep.

1. **Inherited Permission sets** – These are options that come with the database that will assign the permission set based on the rep status when a log in and password is created. Use the Permissions check boxes to set up the options for each inherited permission set.
2. **Permission Checkboxes** – The checkbox must be selected in order to allow any permissions in this section. Removing the checkmark from Member Info would remove all access to the areas in that section.




Permission	Enabled
<input checked="" type="checkbox"/> Allow Login To MIC	
<input checked="" type="checkbox"/> Allow Event Registrations	
<input checked="" type="checkbox"/> Find Members	Enabled
<input checked="" type="checkbox"/> Member Info	
Read/Write	Pay Bills Online
Read/Write	Business Info

3. **Permission Options** – Go through each option for each permission sent and choose what options you would like to have available to them. Read/Write allows them to see and change the information, Read Only allows them to see the information and Disable remove the option from the MIC.
4. This will need to be done for each permission set.
5. **Custom Permission set** – This option allows you to create your own permission set and assign it to reps. Once a custom permission set is created you will need to manually add this set to all of the reps it was intended for. Follow the steps below to create a custom permission set
  - a. Click **Setup** in the left-hand menu
  - b. Click **Manage Permission Sets** in the **Member options** area
  - c. Click **New Permission Set**
  - d. Type the name of the new permission set in the **Permission Set Name:** field
  - e. Select desired permissions. Note: If individual items are enabled, make sure to also select the checkbox for the heading of that section
  - f. Click **Save Permissions**.
  - g. Note: The maximum permissions available here are controlled under **Setup > Member Login Area Options and Settings**

## Send mass email to setup reps with MIC access.

1. Select **Communication** in the left-hand menu.
2. Click **New Email to Multiple Members**
3. Select the desired recipients – Select the representative email addresses using the choices under the Add Representatives.
4. Click **Edit with ChamberMaster/MemberZone**
5. Select the predefined template called **“Create Login Account Invitation”**
6. You have the option to send the communication as it is or you can edit and add additional information by clicking in the box and making your updates.
7. Click **Email Now**
8. Once they receive the email and click on the custom link embedded in the letter they will see this screen come up and they can enter in their new password.



**Create your Account**

Login Name\*:

Password\*:

Repeat Password\*:

Create Account Screen

9. If they have already created a login and password they will receive a message letting them know the account has already been created and will be prompted to click the Forgot Password Link.




**This account has  
already been created**

This link has already been used to create an account. It cannot be used to create another. Click [here](#) to login or access the forgot login/password page.

# Logging in to the Member Information Center

## 1. How to log in as a staff member

- a. In the upper right hand corner of the database click on the  button. When this option is used for logging in to the MIC you will be able to remove any post from the community feed and you will be able to add resources to the **Resource** folder if it is enabled.
- b. **Impersonate Login** - This option allows the staff to impersonate a rep login, with this option staff is able to log in as that rep without needed their login name or password. This can be helpful for assisting them with troubleshooting or train in the MIC. To impersonate a login you will go to Members > Reps Tab > click on the rep you would like to impersonate > if they have an account created you will see a **[login]** link behind their name > once you click on the link you will be logged in as that rep and see what they see.



2. **Logging in as a rep** – It is suggested they go to your website and location the member log in page. From here they can enter in the log in information and get directed straight to the MIC.

## Forgot password process 21:38

If a rep contacts you and they have forgotten their login name and password. You can verify their email address and do one of either option below.

1. Direct them to the website > Member Login page > click Forgot Password Link. They will enter in their email address and the information will be sent to them.
2. From the database you can go to the Members > rep tab and click on the rep that is requested assistance. Under the Login Permissions for this rep you will see a button Change/Send Password > Once you click on this you can send them a resent password link or send them a temporary password to get them in to the MIC.