



Members

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# Member Module Overview

## 1. General tab

- a. **Contact Information** – This is the general business contact information. This will set the contact default for this member
- b. **Additional Information** – This area is where you will update the [status](#), [type](#), important dates, [sales stage and assign an organization rep](#).
- c. **Custom Fields** – These give you flexibility in managing your data. When adding a custom field, you will create a database field that is available across all member records for tracking additional information.

## 2. Reps tab

- a. **List of Representatives** – List of employees tied to this member record. From this list you can set the Primary, Billing and standard rep. If they have a rep login and password created you will be able to impersonate login and log in as the rep to the MIC
- b. **Personal Information** – Personal information for the rep selected in the list of representatives.
- c. **Custom Fields** - Custom Fields are designed to give ultimate flexibility in managing your data. When adding a custom field, you will create a database field that is available across all representative records for tracking additional desired information.
- d. **Web Display Options** – Allows you the option to choose what contact information shows for the rep on the member information page. This can be updated by the rep in the MIC.
- e. **Group Participation** – In this area you are able to see what groups, mailing list or committees this rep is associated with. You are also able to add or remove this rep from a group in this area.
- f. **Login Permissions** - You will be able to see the log in name for the rep and the rep permissions they are assigned. If they forget their password you can reset their password or send them an email for the forgotten password.

## 3. Web Tab

- a. **Web Contact Information** – The information in the section uses the Contact information on the General tab as a default but can be changed by unchecking the Use Company Information box. This information shows on the member information page.
- b. **Web Participation Options** – From here you can enhance a member if you have the marketing package or enable different Display Attributes.

- c. **Web Description/Text Content** – In this are you can see the information the member has set to show on their member information page. It is not necessary for you to update this information, this can be done from the MIC by the rep.
  - d. **Web Photos & Images** – If the member has and enhanced member page they are able to load in logos, images and a video. In this area you are able to see what they have loaded to display.
  - e. **Search Results Map Information** – From here you can update the location of their map pin if it is in an incorrect location or the member has moved. They Member/Rep is able to update this from their MIC.
- 4. **Communication Tab** – This area records all of the emails, notes and follow ups for this member record.
- 5. **Account Tab**
  - a. **General Information** – Current balances, billing contact and renewal month.
  - b. **Membership Fees & Dues** – This are allows you to see the fee items that are assigned to this member record.
  - c. **Transaction History** – From this area you are able to do basic accounting functions like create a new invoice, new sales receipt, new payment and new credit. At the bottom of the page you can view the billing history for this member and work with the transactions for this member.
- 6. **Stats Tab**
  - a. **Event Activity** – Shows the registration, actual attendance and sponsorship for this member record.
  - b. **Available Reports** – This report can be printed or emailed to share with you members. It shows them what still needs to be updated for the member information page, login stats and basic membership hit statistics.
- 7. **Advanced tab**
  - a. **Business Category** – From this are you can add and remove business categories from a member record.
  - b. **Hot Deals** – From here you can review past and current Hot Deals as well as edit any hot deals for this member record
  - c. **Job Posting** – In this are you can review past and current Job Posting as well as edit any Job Postings for this member record.
- 8. **Marketing Tab** (only available with databases that have a Premier or Pro database)
  - a. **Sponsorship Options/Enhancements** – in this area you are able to [load banner](#) ads to display on the website. You can choose where and how long the banner will run.
- 9. **Files Tab** – This area allows you to store records that pertain to this member record. It will help you move toward a more paperless process and make items available when you are away from the office. The database has a 50 MB storage limit. If you need additional space we suggest using a 3<sup>rd</sup> party product.

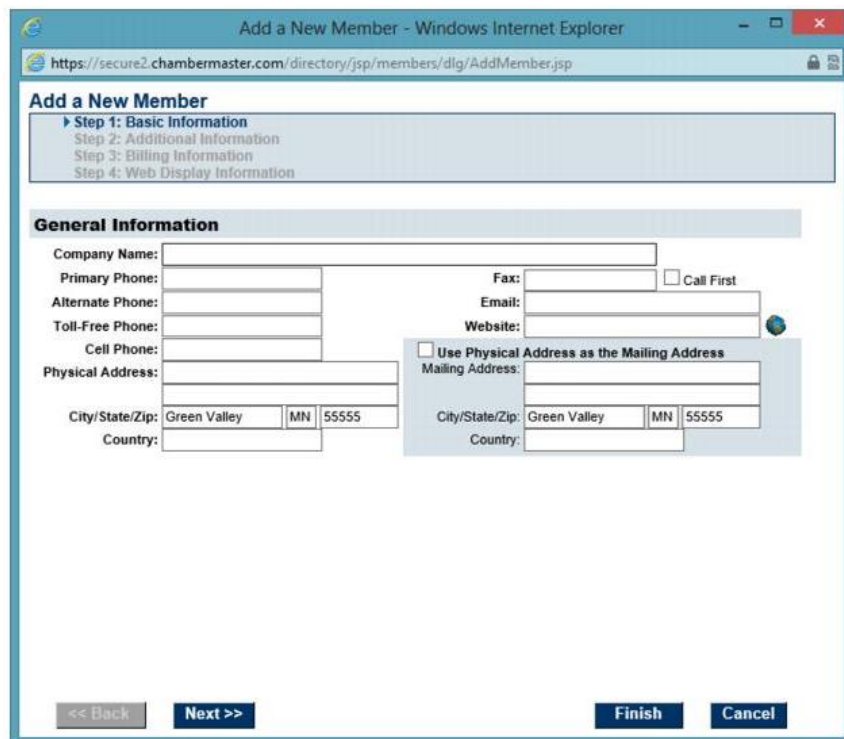
## Add Member/Rep

1. Click Add at the top of the database and select Member



On the Add menu, click Member.

2. This will open up the Add a New Member wizard. Click next to move to the next step
  - a. Step 1 - add basic company contact information. The minimum information needed to create a record is a company name.



- b. Step 2 – Update the additional information for the member record. Select the correct status, Join date, member type, assign Category and add representative to the member record.

The screenshot shows a web browser window titled "Add a New Member - Windows Internet Explorer" with the URL <https://secure2.chambermaster.com/directory/jsp/members/dlg/AddMember.jsp>. The page is titled "Add a New Member" and shows a progress bar with four steps: Step 1: Basic Information, Step 2: Additional Information (selected), Step 3: Billing Information, and Step 4: Web Display Information.

The "Business Information" section contains the following fields:

- File-By Name:
- Status:  (dropdown)
- Join Date:
- Member Type:  (dropdown)
- Web-Participation:  (dropdown)
- Full-Time Emps:
- Sales Rep:  (dropdown)
- Part-Time Emps:
- Comment/Notes:
- Categories:  (dropdown) |  (dropdown) | [Assign Categories](#)
- Representatives:  (dropdown) |  (dropdown) | [Add a New Rep](#)

Navigation buttons at the bottom include "<< Back", "Next >>", "Finish", and "Cancel".

- c. Step 3 – Enter the billing information such as set the renewal month, Billing Rep, and assign the member fee and dues

The screenshot shows the same web browser window, now on Step 3: Billing Information. The progress bar highlights Step 3. The "Billing Information" section contains the following fields:

- Renewal Month:  (dropdown)
- Billing Contact:  (dropdown) | [add a new rep](#)
- Contact Preference:  (dropdown)
- Account Name/ID:
- Billing Notes:

The "Membership Fees" section features a table with the following columns: Fee Item Name, Amount, Qty, and Description. There are checkboxes for "check all" and "uncheck all" on the left. An "Add a Fee Item" button is located at the bottom right of the table.

Navigation buttons at the bottom include "<< Back", "Next >>", "Finish", and "Cancel".

- d. Step 4 – You do not need to complete this step to finish the record. You could ask the member to log in to their MIC to update this information. Click **Finish** to complete the process.

Add a New Member - Windows Internet Explorer  
https://secure2.chambermaster.com/directory/jsp/members/dlg/AddMember.jsp

**Add a New Member**  
Step 1: Basic Information  
Step 2: Additional Information  
Step 3: Billing Information  
▶ Step 4: Web Display Information

**Web Display Information**

Use Company Information [more information](#)

Company Name: \_\_\_\_\_ Displayed Address: \_\_\_\_\_  
Primary Phone: \_\_\_\_\_  
Alternate Phone: \_\_\_\_\_ City/State/Zip: Green Valley MN 55555  
Fax: \_\_\_\_\_ Website URL: \_\_\_\_\_  
Email: \_\_\_\_\_ URL Text: \_\_\_\_\_

Display Attributes:

<input type="checkbox"/> Does Not Display On Web	<input type="checkbox"/> Disable Login	<input type="checkbox"/> No Web Link on Member Page
<input type="checkbox"/> Cannot Buy Ads/HotDeals	<input type="checkbox"/> Disable Member Info Page	<input type="checkbox"/> Web Link on Search Results
<input type="checkbox"/> Google Basic	<input type="checkbox"/> Google Enhanced	

Description: 200 chars available  
Hours of Operation: 100 chars available  
Driving Directions: 200 chars available  
Keywords: \_\_\_\_\_

<< Back    Next >>    Finish    Cancel

3. Now that the member record is entered in to the database now would be a good time to go through the additional tabs of the member module and update any custom fields, send welcome letters/login invitation and complete the payment process or send invoice.

## Drop a member

1. On the General tab, click on the **Membership Status arrow** in the Additional Information area
2. Click Dropped/Inactive



3. Complete the fields in the Drop Member Options
  - a. For the drop reason if you click on the title Drop Reasons you are able to edit the list of drop reasons
  - b. If the fees are removed from a dropped member's record, the dollar value of the dropped member will not show on the Drop Report. Dropped members are not included in recurring membership billing even if fees are left on their record.
4. Click Save & Exit to complete the process.

**Note:** when a member record is dropped there are additional updates that are automatically done.

- The login is disabled for the reps
- A redirect is set so their member page cannot be seen on the directory.
- Hot Deals and Job Postings are removed from the website.

As part of the drop process you could send an email letting them know what they no longer have access to and either [write off](#) any balances or continue to collect.



# Reinstate a dropped member

1. Click on the **Members** in the left-hand menu and select the desired member to be reinstated/re-activated.
2. On the General tab, click the Membership status arrow in the additional information area



3. Click the desired membership status
4. Complete the Activate member window by updating the rep status and group status

## Activate Member

### Leon & Gonzalez Corp

Representatives		
Contact Name	Rep Status ?	Group Status ?
All Member Representatives	<input type="text"/>	<input type="text"/>
Daniel Leon	Inactive <input type="text"/>	Leave Unchanged <input type="text"/>

#### 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:

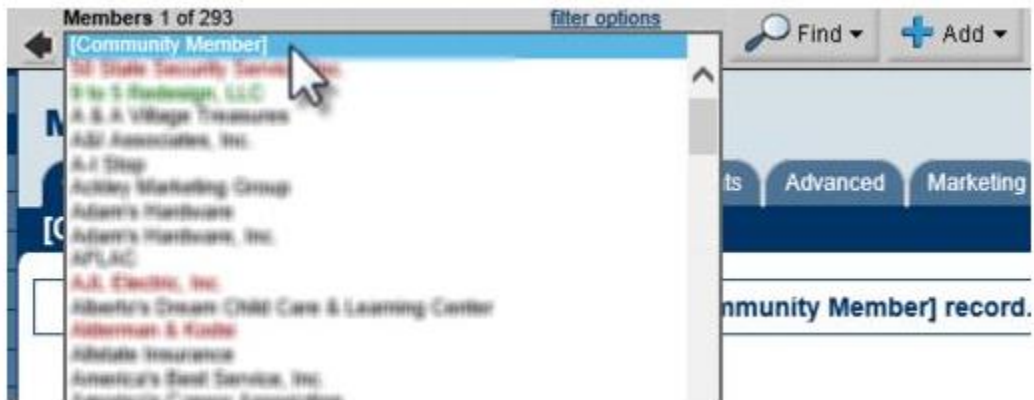
<input type="checkbox"/> Do Not Display On Web	<input type="checkbox"/> Disable Login	<input type="checkbox"/> No Web Link on Member Page
<input type="checkbox"/> Cannot Purchase Ads/HotDeals	<input type="checkbox"/> Disable Member Info Page	<input type="checkbox"/> Hide Social Networks

Redirect Index:

5. Click **Save & Exit**. From this point you could follow the process for adding in a new member.

## Community member

The Community Member record provides a special way to organize information for a person that has some association with your organization – but is not associated with a member.



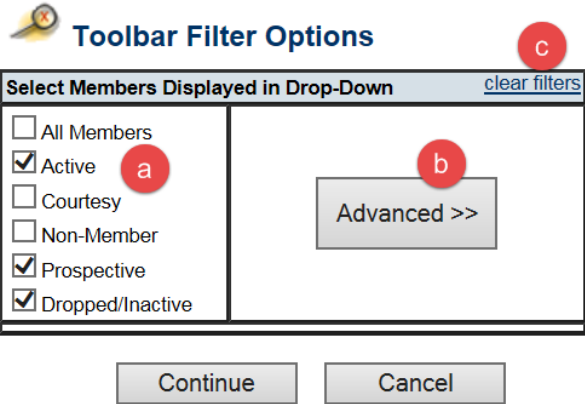
1. In the member's module select [Community Member] from the members drop down (it will be found at the very top of the list).
2. Click the **Reps** tab.
3. Click **Add a new Rep**
4. Complete the Add a New Representative screen (make sure to fill-in the Company field if appropriate)
5. Click Save and Exit.

# Member Drop down options and filters

- Black arrows – These are used to move the list to the previous member or to the next member in line.

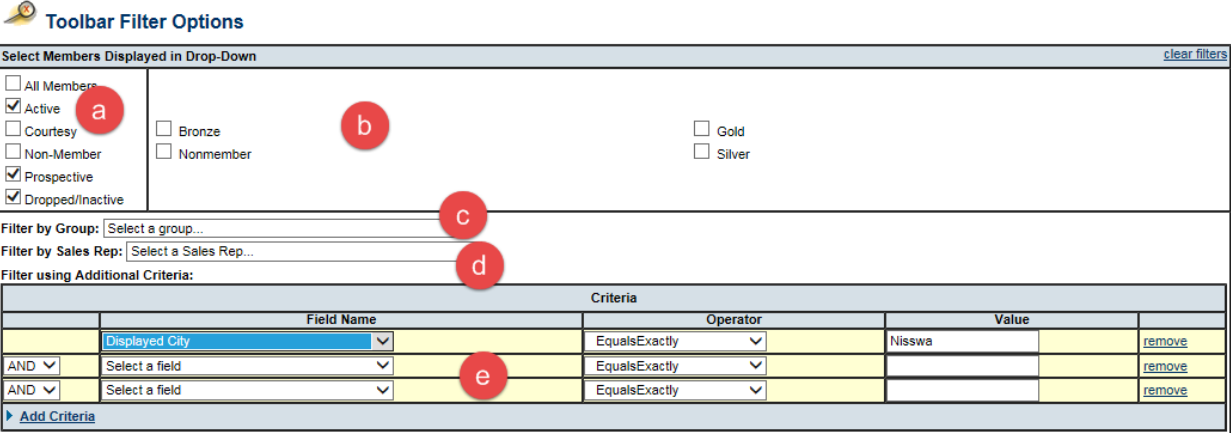


- Filter options
  - Sort the list by member status
  - Advanced filtering
  - Clear filters sets the drop down back to the default list of Active only members




## Advanced filtering

- Members Status
- Member Type
- Only look at the members that have reps tied to a specific group
- Select the Chamber reps assigned on the Members > General Tab Additional information



- h. Criteria – With this option you can choose from a list of fields in the member module including the custom fields to sort the list to be a very specific list of people.

 **Toolbar Filter Options**

Select Members Displayed in Drop-Down [clear filters](#)

All Members

Active

Courtesy

Non-Member

Prospective

Dropped/Inactive

**Filter by Group:**

**Filter by Sales Rep:**

**Filter using Add:**

Displayed Address 1

Displayed Address 2

Displayed Alternate Phone

Displayed City

Displayed Country

Displayed Email

Displayed Fax

Displayed Name

Displayed Primary Phone

Displayed State

[Add Criteria](#)

Gold

Silver

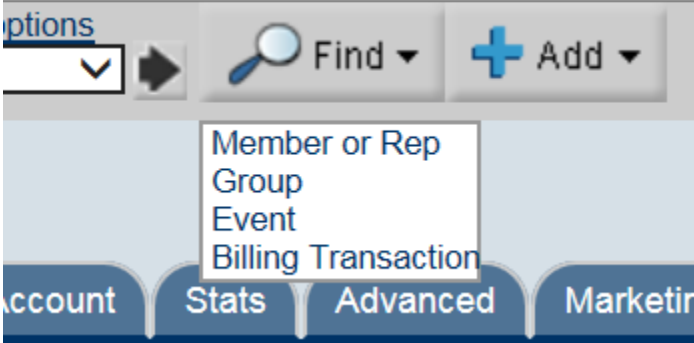
▼

▼

Criteria			
Criteria	Operator	Value	
Displayed City	EqualsExactly	Nisswa	<a href="#">remove</a>
Displayed Country	EqualsExactly		<a href="#">remove</a>
Displayed Name	EqualsExactly		<a href="#">remove</a>

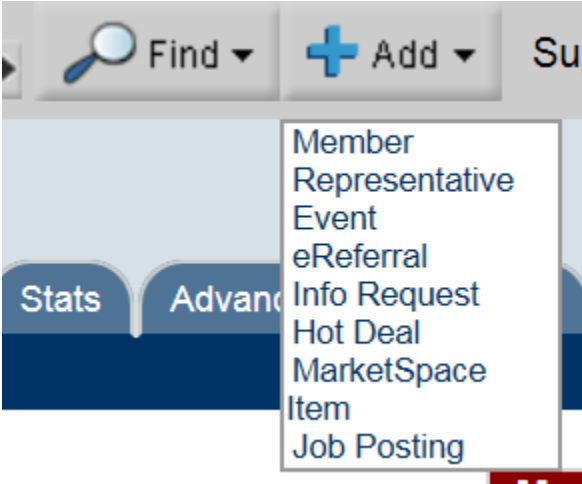
# Find Button

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.



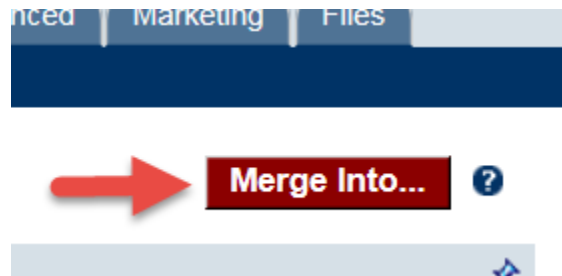
# Add Button

The add button allows you to add information easily from where ever you are in the database. This button will stay at the top of the database regardless of what module you are in.



# Merge member records – Admin only option

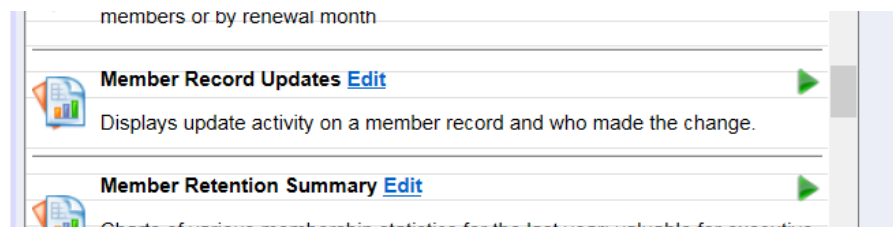
1. In the members module select the member that has the least information recorded
2. Click on the General Tab
3. Click on **Merge Into...**



4. Select the member that information should be merged in to and click Continue
5. For each row of information, click either the data in column 1 or column 2 to pick the database for the final merged member column 3.
6. Once you have the correct information in the 3<sup>rd</sup> column click Merge. This will merge the information to create 1 record. The communication and billing information will be merged in to that 1 record.

# Common Member Reports

1. Member Join Reports
  - a. Go to Dashboard
  - b. Click on the **Membership tab**
  - c. In the New Member graph click **View Detailed Report**
  - d. Once in the report select your filters and click **Refresh** report. This report will show you the members with a join date in the range you entered. If there are members missing from this report go to their member record and verify they have a join date and it is correct.
2. Member Drop Report
  - a. Go to **Dashboard**
  - b. Click on **Membership Tab**
  - c. Find the Dropped Members graph and click on **View Detailed Report**
  - d. Select your filters and click **View Report**. This report will show you the details of the dropped members based on the information you selected. If there is members missing from this report check the member record and verify they have a drop date and it is correct.
3. Active Member Report
  - a. Go to **Dashboard**
  - b. Click on the **Membership Tab**
  - c. Find the Active Members graph and click on **View Detailed Report**
  - d. Select your date range, view and member status.
  - e. This report will show you how many members were set to active with in the entered date range.
4. Member Record Update
  - a. Click on **Reports** in the left side navigation
  - b. Click on **Membership**
  - c. In the list of reports search for **Member Record Updates**



- d. This report will show you the changes that have been done to your member records, when they change was done, what it was changed to and who did the change.

## 5. Custom Report

- a. Click on **Reports**
- b. Click on **Custom Member Report** or **Custom Representative Reports** depending on the information you are looking for.

The screenshot shows two side-by-side panels. The left panel, titled "Report Finder", has a search bar with a "Search" button and a list of categories: "Popular / Frequently Used", "Recent", "Featured", "Recently Added", "Membership (51)", and "Advertising (6)". The right panel, titled "Reports", shows "Featured Reports, Found 3" and a link for "ReportBuilder (Beta)". It lists two reports: "Custom Member Report" and "Custom Representative Report", each with an "Edit" link and a brief description.

- c. Click on each heading to see the full list of options. This list will allow you to pull only the information you wish to see including Custom Fields.

The screenshot shows a "Saved Reports" section with a dropdown menu for "Load A Saved Report" and a "Delete Selected Report" button. Below it is the "Fields Reported" section, which includes a "clear fields" link. Under "Available Fields", there is a sub-section for "Contact Information" with checkboxes for "Company Name", "File-By Name", "Primary Phone", "Alternate Phone", "Toll-Free Phone", "Cell Phone", "Fax", and "Email". The "Selected Fields" section shows a list of selected fields: "Company Name", "Primary Phone", and "Full Physical Address". Below this list are dropdown menus for "Primary Sort" and "Secondary Sort".

- d. Once you have the list set click **Continue** at the bottom of the page to move to the advanced filtering for the report.



e. Filters

1. Member Status
2. Member Type
3. Specific Group from the Groups module
4. Specific Rep from the Member General tab
5. Additional Criteria – to find the exact members you want on the list
6. Format the layout of the report
7. View/Print will show the report in a PDF type layout
8. Download Report will download in to CSV
9. Change Report Options will take you back to the first screen to make any adjustments needed.
10. Create Group – Once you have the correct members or reps in the report you can use the report to create a group in the Groups module.

## Reports

### Member Listing

**Filters** (optional)

**Filter by Member Status:** 1

Active     Courtesy     Non Member     Inactive

**Filter by Membership Type:** 2

Bronze     Silver     Gold     Nonmember

**Filter by Group:** 3

Select a group... ▾

**Filter by Sales Rep:** 4

Select a Sales Rep... ▾

**Filter using Additional Criteria:**

Criteria				
	Field Name	Operator	Value	
	Select a field ▾	EqualsExactly ▾		<a href="#">remove</a>
AND ▾	Select a field ▾	EqualsExactly ▾	<span>5</span>	<a href="#">remove</a>
AND ▾	Select a field ▾	EqualsExactly ▾		<a href="#">remove</a>

[▶ Add Criteria](#)

**Additional Options**

**Report Format:** 6

Table Style (each field is listed in it own column)

Directory Style (each field is listed on a new line)

Show field names for all data reported

Customized Report Layout [▶ select a template](#)

**Save Report** (optional)

Save Current Report As:  [▶Save](#)

7 [View/Print Report](#)    8 [Download Report](#)    9 [Change Report Options](#)    10 [Create Group](#)