

# A Partner's Guide to the Partners-Only Area

## Ocala Metro Chamber & Economic Partnership

*An illustrated guide to getting the most  
out of your interactive partner portal*

Brought to you by



# PARTNERS ONLY

Username

Password

Login

[Click here for login information](#)



# Partnership has its Privileges

- Our new online Partner Portal features are powered by MemberClicks, the association industry's most powerful Association Management Software system.
- Our website offers many self-service and exclusive benefits that only Partners and/or their employees can take advantage of.
- To ensure only Partners receive these benefits, these areas of our site require a valid log in.
- The pages in this guide will teach you how to log in and update your information, as well as take advantage of as many benefits as possible.
- The more you update and personalize your Partnership, the more value you will receive from us!

# What can I do here?

- Change username/ password
- Update your contact information
- View upcoming events and register for CEP events
- Add a coupon (discount/deal)
- Pay your bills
- Upload images (enhanced listings only)
- Stay informed
- View your Referral Report (YTD)



## PARTNER PORTAL HOME

[Log Out](#)

[Partner Portal Home](#)

[Update Password](#)

[Add A Coupon](#)

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[Profile Update](#)

[Submit an Event](#)

[Referral Report \(YTD\)](#)

[Upload Images](#)

### Ocala Metro Chamber & Economic Partnership

Welcome to Ocala Metro Chamber & Economic Partnership's new Partners Only Portal! Please take a moment and update your profile. If you have any questions, please contact [info@OcalaCEP.com](mailto:info@OcalaCEP.com)

### My Events

Event Title	Event Item	Quantity	Amount
exCEPTional Mornings > February 2021	exCEPTional Mornings per person Registration	16	\$240.00

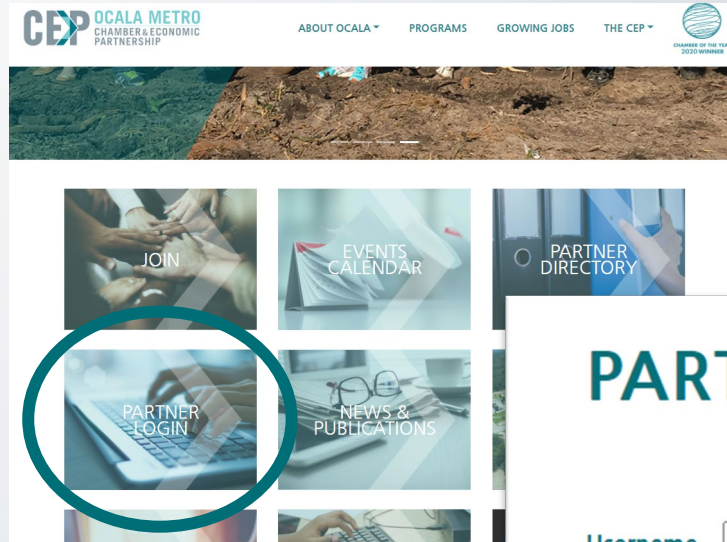
### Upcoming Events

Networks CEMG  
Feb 09, 2021 8:15 AM - 9:15 AM



# Log in to Take Control of Your Partnership

- You will need to use your username and password to gain access to our private Partners Only Area, or to receive special discounts on event registrations.
- If you ever forget your password, [click the link](#) to ask for it to be sent to your email address.



## PARTNERS ONLY

Username

Password

[Click here for login information](#)



# Update Your Profile Information

## PARTNER PORTAL HOME

Partner Portal Home  
Update Password  
Add A Coupon

Pay Your Bills  
**Profile Update**  
Submit an Event

Referral Report (YTD)  
Upload Images

This link will open a page that allows you to update much of the information on your profile, as well as any other profile you are related to and have editing rights for. This helps us ensure we always have the latest information about you and your business.

### You can edit the following information:

- Name, address, and other basic contact information
- Directory Listing category and descriptions
- Employee information (Related Profiles)
- Company contact information: address, phone, email, and more
- Social media accounts
- Demographic information (Update your preferences)

# Update Your Contact Information

- You have the ability to edit your profile. Staff marked as Editor are able to edit information as well.
- Once you make changes, they are submitted for approval by the CEP.
- If you have the right permissions, you can also add new profiles related to your organization.
- When finished editing, click “Save Relationships” at the bottom of the page.

**CEP Ocala Metro**  
CHAMBER & ECONOMIC PARTNERSHIP

ABOUT Ocala ▾ PROGRAMS GROWING JOBS THE CEP

## Ocala Metro Chamber & Economic Partnership

[Edit My Profile](#) Click here to edit your profile [Click here to add a new employee](#)

### Editable Profiles Related to Ocala Metro Chamber & Economic Partnership

[Add New Profile](#)

Profile	
<p><b>Jessica McCallum</b></p> <p><input type="checkbox"/> Main Contact</p> <p><input type="checkbox"/> Editor</p> <p><input checked="" type="checkbox"/> Receives Communication</p> <p><input type="checkbox"/> Billing Contact</p> <p>Relation Type: <input type="text" value="Employee"/></p> <p>Title: <input type="text" value="Director of Business Creation"/></p>	<a href="#">Edit Profile</a>
<p><b>Jim Pazda</b></p> <p><input type="checkbox"/> Main Contact</p> <p><input type="checkbox"/> Editor</p> <p><input checked="" type="checkbox"/> Receives Communication</p> <p><input type="checkbox"/> Billing Contact</p> <p>Relation Type: <input type="text" value="Employee"/></p> <p>Title: <input type="text" value="Director of First Impressions"/></p>	<a href="#">Edit Profile</a>
<p><b>Joe Reichel</b></p> <p><input type="checkbox"/> Main Contact</p> <p><input type="checkbox"/> Editor</p>	<a href="#">Edit Profile</a>

# Update Your Contact Information

- The Update Form shows you all your information on file. Add as much as you can!
- This information can be used on your directory listings or for communications from us.
- All updates you make are submitted for approval.
- Make sure to click Save at the end of the process.

The screenshot shows a web form titled "Ocala Metro Chamber & Economic Partnership". On the left is a sidebar menu with the following items: "General Information", "Additional Addresses", "Additional Phones", "Additional Email Addresses", "Directory Listing", "Social Media", "Update Your Preferences", and "Update Your Preferences". The main form area contains the following fields:

- Report Name: Ocala Metro Chamber & Economic Partnership
- Address 1: 310 SE Third Street
- City: Ocala, State/Province: FL, Zip: 34471
- Work Phone: (352) 629-8051
- Home/Other Phone: (352) 629-7651
- E-mail: Kevin@OcalaCEP.com
- Website: http://www.OcalaCEP.com
- Preferred Method of Contact: Work
- Preferred Billing Method: Both
- Employees Full-Time: 20
- Employees Part-Time: 1

At the bottom of the form are three buttons: "Save and Keep Working", "Save and Submit", and "Close".

Three callout boxes provide additional information:

- A callout box pointing to the sidebar menu says: "You have many types of information you can update".
- A callout box pointing to the form fields says: "These fields show what information we have now. Please add and update information as needed.".
- A callout box pointing to the "Save and Submit" button says: "Don't forget to save your information before closing the screen.".

## ONLINE BILL PAY

Log Out

Partner Portal Home	Pay Your Bills	Referral Report (YTD)
Update Password	Profile Update	Upload Images
Add A Coupon	Submit an Event	

Open Invoice Items for:  
Test Company  
123 SE Any Street  
Ocala, FL 34471

### OPEN INVOICES

Selected	Date Due	Invoice Num	Invoice Date	Description	Item Amount	Amount Paid	Amount Due
<input type="checkbox"/> VIEW	2/22/2021	20135368	2/22/2021	PARTNERSHIP DUES:Renewal - Business	\$600.00	\$0.00	\$600.00

Payment Amount: **\$0.00**





Name On Card:

Billing Address 1:

Billing Address 2:

City:  State/Prov:  Zip/Postal Code:

Country:

Credit Card:        

Card Number:

Security Code:  (- This is the non-raised 3 or 4 digit code on the back of your card.)

Expires Month:  Year:

Phone Number:

Email Address:

# Pay Your Bills

- The top section displays your open invoices. Check the box to pay online and complete the credit card form, or click View to print a copy.
- If you have any previously paid invoices, they will show at the bottom under Transaction History. Click Invoice Number to print a copy for your records.



# Submit an Event

- Do you have an event that you would like other partners or the community to know about? Submit your event to the CEP.
- Once your event is reviewed and approved, it will appear as a Community Event on the CEP Events Calendar. The calendar is located on our homepage: [www.OcalaCEP.com](http://www.OcalaCEP.com)

## SUBMIT AN EVENT

Event Name

Event Type (choose from list)

Event Start Date (MM/DD/YYYY)

Event End Date (MM/DD/YYYY) (Same as event start date unless multiple day event)

Event Start Time  
PM  :

Event End Time (leave blank if unknown)  
 :

Email address for event questions. (not displayed publicly)

Event description, details and additional information

Location/Directions

Physical address where the event will take place. (No PO Boxes)

City

State

Zip

Phone number for event questions. (displayed publicly)

Special Registration URL Enter the full path URL (For example, http://www.website.com)

Overriding Weather Information Link Leave this box blank if you have entered the Zip Code

Overriding Map Link

# Referral Report (YTD)

Ever wonder how often you've been referred by us? Through our website banner ads, online Partner directory, staff recommendations or event sponsorships, we track most of the referrals we provide you.

This section runs a detailed Referral Report, which shows you a very granular report of every time you've received a lead or impression from our website or staff.



# Upload Images


*Enhanced listings only*

Our Online Partner Directory can display images and videos on your listing, if your listing type allows it. When accessed, this section of your Partners-only area will allow you to upload this media directly to your listing on the directory, so you can promote yourself as best as possible.

If you have the right listing level, the images or video will display automatically on your directory listing; if you don't have the right listing level it will not appear (but it will be stored in your profile).

You can add things like:

- Business logos
- Embedded videos
- Photos

☰

## MEDIA UPDATE

Log Out

<a href="#">Partner Portal Home</a>	<a href="#">Pay Your Bills</a>	<a href="#">Referral Report (YTD)</a>
<a href="#">Update Password</a>	<a href="#">Profile Update</a>	<a href="#">Upload Images</a>
<a href="#">Add A Coupon</a>	<a href="#">Submit an Event</a>	

Depending on your level of partnership or advertising participation, the media information uploaded here might have restrictions on when and where they display. Please contact the Ocala Metro Chamber & Economic Partnership for more information and details on these restrictions.

**Logo:**

Upload your company logo or profile picture here. Accepted file format: jpg or gif. Maximum dimensions: 245px width; 160px height.

No file chosen (max size 4 mb)

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**Photo 1:**

Upload your photo here. Accepted file format: jpg or gif. Maximum dimensions: 200px width; 150px height.

No file chosen (max size 0.075 mb)

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**Photo 2:**

Maximum dimensions: 200px width; 150px height.

No file chosen (max size 0.075 mb)

# Add a Coupon

- As part of your CEP benefits, we offer Partner Coupons & Discounts in addition to our CEP PartnerPerks program. CEP partners may participate by offering discounts through the Coupon tool in your partner portal.
- You can create and manage your own coupons and track their usage in your Referral Report.
- Your company information will autofill on the form once you are logged in.

## ADD A COUPON

[View Coupons and Discounts](#)

### Coupons

New Coupon

You have no active coupons. Click on "New Coupon" button to add a coupon.

Online Coupons Information	
<b>Coupon Type</b>	Select Coupon Type... ▾
<b>Offer Title</b>	Enter what you're offering. For example, "20% off your first order" or "\$25 off all orders of \$100 or more." <input type="text"/>
<b>Description Of Offer</b>	Briefly describe your product or service. Also include any limitations, such as "One coupon per customer per visit" or "Not valid on holidays." <input type="text"/>
<b>Price (if any)</b>	Use only if you have a special price that's specific for the item you're promoting. Most members will leave this blank - it will not appear on your coupon. 0.00 <input type="text"/>
<b>Coupon Offer Expires</b>	Enter the date your coupon expires, if any. This date will appear on the coupon Sunday, May 23, 2021 <input type="text"/>
<b>URL Link</b>	Enter the web address you would like linked to from the coupon. This can be your home page or a special "landing page" you set up on your site like www.mydomain.com/specialoffer.htm. Be sure to include the complete address. <input type="text" value="http://www.OcalaCEP.com"/>
<b>Display Name</b>	Enter the company name to appear on the coupon. <input type="text" value="Ocala Metro Chamber &amp; Economic Partnership"/>
<b>Email Contact</b>	Enter an email address for the coupon. Note: this address will appear on the coupon. If you do not want to expose your email address, leave this field blank. <input type="text" value="Kevin@OcalaCEP.com"/>
<b>Contact Phone</b>	Enter the phone number to appear on the coupon. <input type="text" value="(352) 629-8051"/>
<b>Reference Code</b>	Enter a reference code, if any, such as "CODE22" or something that can help you track or identify the customers who use this coupon. This can also be helpful if you accept phone orders as you will know where the caller got your information. <input type="text"/>
<b>Image/Logo Location</b>	Enter the location of your logo or image that resides in a directory on your web site. For example, www.mydomain.com/logos/company_logo.jpg. This file should be a jpg or gif file and be no more than 100 pixels x 100 pixels. <input type="text"/>
<b>Image/Logo Link</b>	Enter the web address you would like linked to from the logo. This can be the same page or a different page than the URL link above. <input type="text"/>
<b>Please also complete the following</b>	
<b>Your First Name</b>	NOTE: This information is for internal use and will not appear on the coupon <input type="text"/>

## Enjoy Discounts for Event Registration

- For the few CEP events that have fees attached, partners will always receive a discount rate from the general public.
- For those partner tiers that offer exclusive or complimentary tickets, you must be logged in to take advantage of those benefits.
- Look for the login information to ensure you get every benefit you deserve.

