Introduction to MatrixMaxx - June 5, 2024

Introduction to MatrixMaxx (00:19)

- Summary: Overview of the MatrixMaxx Association Management System (AMS) and its purpose. Introduction to the 2024 version and initial setup demonstration using a demo site.

Logging into MatrixMaxx (00:49)

- Summary: Steps to log in as a staff member of a fictitious association for demo purposes. Mention of individualized usernames and passwords for staff to allow module access and dashboard customization.

System Access and Browser Compatibility (01:59)

- Summary: Explanation of MatrixMaxx's accessibility through modern web browsers like Chrome, Safari, and Edge. Highlights the responsive design for use on desktops, tablets, and phones.

Dashboard Overview (02:42)

- Summary: Description of the customizable dashboard per user, including widgets. Demonstration of adding and managing widgets for various functions such as meetings and membership summaries.

Staff Access and Permissions (03:55)

- Summary: Instructions on managing staff access through the admin area, including adding new staff, setting access levels, and customizing the dashboard.

Interface Navigation (05:46)

- Summary: Navigation within the system using mega menus and dashboards. Emphasis on reducing clicks using these features for efficiency.

Reporting and Searching Features (10:05)

- Summary: Explanation of the reports section within each module and how to perform advanced searches for individuals and organizations. Mention of mailing list criteria and export options.

Quick Search and Bookmarks (12:55)

- Summary: Overview of the quick search feature for individuals, organizations, invoices, and meetings. Instructions on bookmarking frequently accessed records and using the recently viewed section.

Notifications and Settings (16:09)

- Summary: Introduction to the notifications and insights engine. Explanation of how to manage notification settings for various categories like store purchases and new profiles.

Managing Organizations and Contacts (20:34)

- Summary: Detailed walkthrough of the organization view page, including membership status, critical notes, and activity logs. Explanation of managing staff linked to organizations and adding new individuals to the organization.

Editing Organizations and Individuals (31:00)

- Summary: Instructions for editing organization and individual records, including changing basic information, addresses, and membership records. Mention of moving individuals between organizations without creating duplicate records.

Merging Records (33:33)

- Summary: Steps to merge duplicate organization or individual records, selecting the keeper and loser records, and retaining necessary data.

Individual View Page (36:01)

- Summary: Overview of the individual view page, including memberships, activities, communications, and relationships. Description of managing addresses for individuals.

Adding New Organizations and Contacts (40:42)

- Summary: Guidance on adding new organizations and contacts, including the silent duplication check to prevent adding duplicates.

Website Integration and WWW Links (42:03)

- Summary: Explanation of MatrixMaxx-controlled web pages ([Www](). Links) that can be linked from an organization's website. Demonstration of how to access and link these pages.

Q&A Session Highlights (53:39)

- Summary: Discussion of specific user questions, including creating product groupings, searching by committee, entering double payments, and adding sponsorships to existing meetings.

Conclusion and Future Sessions (57:56)

- Summary: Recap of the session and invitation to future Q&A sessions for more in-depth discussions and follow-up on specific questions.