



# Administrative Setup

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# Updating your Browser Settings

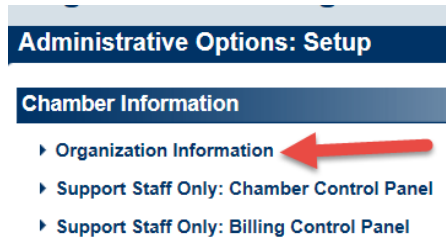
Accessing your ChamberMaster or MemberZone from a computer that has never run it before requires a few configuration changes to the web browser and any pop-up blocker software. These selections should only need to be set once, but may need to be checked again if updates or changes are made to your web browser, pop-up blocker software or operating system.

Please select your browser to find the step by step instructions

- [Internet Explorer](#)
- [FireFox](#)
- [Google Chrome](#)
- [Safari](#)

# Update your Organization Information

1. Click **Setup** in the left-hand navigation bar.
2. Click **Organization Information** in the Information area



3. Edit the desired fields on the General Business Information screen
  - a. Ensure your organization's name and address is complete and accurate
  - b. Select the correct country and time zone
  - c. Update your phone number and website
  - d. Enter in the organization's generic email address.
    - i. This email is used when automatic emails are sent from the database as the From Address.
  - e. [Upload your organization's logo](#) for display at various places through the software

The screenshot shows the 'General Business Information' form. The fields are as follows:

- Name:** Support-Melissa Frame (a)
- Street:** 24400 Smiley Rd Ste 4
- City:** Nisswa
- State:** MN
- Postal Code:** 56468
- Time Zone:** United States (b), (GMT-06:00) Central Time
- Business Phone:** 800-825-9171 (c)
- Toll Free Phone:**
- Fax:**
- eMail:** support@micronetonline.com (d)
- Web-Site Address:** http://missyssite.sampleorg.com/
- Employees/Reps:** Maggie Douglas, Melissa Frame, RuthAnn Hanson (Add / Remove)
- Primary Contact:** Luke Jones
- Business Logo:** Green Valley Chamber of Commerce logo (e)

4. Click **Save**.

# Manage Employees and Reps

1. Click Setup on the left-hand navigation bar
2. Click **Employees/Reps** in the Chamber/Association Information area.

## Chamber Information

▶ Organization Information



▶ Chamber Employees/Reps

3. Click **Add a New Rep**

re	support@micronetonline.com
<a href="#">Deactivate Reps</a>	<b>Add a New Rep</b>



4. Complete the Personal Information, Contact Information and Click **Save & Exit**

## Add a New Chamber Staff Member/Representative

### Personal Information

Prefix: <input type="text"/> <a href="#">edit prefixes</a>	Greeting: <input type="text"/>
<b>First Name:*</b> <input type="text"/>	Job Title: <input type="text"/>
Middle Name: <input type="text"/>	<input type="checkbox"/> Primary Contact
<b>Last Name:*</b> <input type="text"/>	
Suffix: <input type="text"/> <a href="#">edit suffixes</a>	

### Contact Information

[▶ copy business information](#)

Contact Preference:* <input type="text"/> eMail	Phone Preference:* <input type="text"/> Work Phone
Address: 24400 Smiley Rd Ste 4	<b>Work Phone: 800-825-9171</b>
City/State/Zip: <input type="text"/>	Home Phone: <input type="text"/>
Country: <input type="text"/>	Cell Phone: <input type="text"/>
<b>eMail: support@micronetonline.com</b>	Alt. Phone: <input type="text"/>
Comments: <input type="text"/>	Fax: <input type="text"/>

**Save & Exit**

Cancel

5. Update Permissions for new rep make sure to click **Save** when done
  - a. Create database login and password
  - b. Set [database permission](#)
  - c. If you have a SmartCMS website check the box to allow this staff person to have access to make updates to the website.

## Permissions for Maggie Douglas

Login Account:	Login Name: <b>MDLN</b> <span style="color: red;">a</span> <a href="#">▶ use email</a> Password: <b>#####</b> <a href="#">▶ edit password</a> <input type="button" value="delete login account"/>
Database Permissions:	<input checked="" type="checkbox"/> Allow Maggie Douglas to log in to the database <span style="color: red;">b</span> <a href="#">▶ edit permissions</a> Permissions: <b>Administrator</b>
SmartCMS Permissions:	<input checked="" type="checkbox"/> Allow Maggie Douglas to log in to SmartCMS website(s) <span style="color: red;">c</span> <input checked="" type="checkbox"/> missysite.sampleorg.com

## Online Member Application

1. Click **Setup** on the left-hand side
2. Under the Member Option click on **Define Membership Packages**
3. Complete the different tabs of the Member Application Form Setup
  - a. **General** – Turn on payment options, add a custom introduction message to show at the top of the application and a custom Thank You message to show on the confirmation page.
  - b. **Packages** – Enter in the membership packages available or load in a fee schedule.
  - c. **Package Add-ons** – Enter in any additional items that could be added to membership or add in the application processing fees.
  - d. **Optional Fields** – This area allows you to choose what you would like to have a option, required or hidden on the application form
  - e. **Custom Fields** – This area will pull the Custom Fields from the Members > General tab > Custom Fields. If you need to make any changes to this area you will need to do that from Members
- *Approving the application steps can be found by clicking the Online Member Application heading.*

# Manage Business Categories

1. Click Setup on the left-hand side of the database
2. Under Member Options click on **Define Business Categories**
3. Below is a list of feature available on this page
  - a. Create a new business category
  - b. To edit the category click in the text box and make all of the changes
  - c. Check the boxes on the right-hand side of the database then click remove selected items to remove a category
  - d. Associate a QuickLink to the business category.

Business Categories									
Sub-Categories	Category Name	Members	QuickLink	Directory	MarketSpace	ID	remove	Actions	
	Auto Parts, Dealers and Service	<a href="#">7 members</a>	Automotive sales and service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	226	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Beauty Salon, Skincare, Makeup	<a href="#">4 members</a>	Personal Services & Care	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	227	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Building Contractors	<a href="#">6 members</a>	Constructions and building services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	234	<input type="checkbox"/>	<a href="#">3 attributes</a>	<a href="#">Edit</a>
	Dentist	<a href="#">3 members</a>	Health Care & products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	228	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Diner and Drive-in's	<a href="#">2 members</a>	Restaurants, Food & Beverages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	229	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Doctors	<a href="#">6 members</a>	Health Care & prod	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	240	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Gift Cert	<a href="#">3 members</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	238	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Grooming and Pet Supplies	<a href="#">4 members</a>	Pets & Veterinary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	225	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Hotel, Motel and BB	<a href="#">4 members</a>	Lodging & Travel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	233	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Lawyers	<a href="#">15 members</a>	Legal services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	222	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Real Estate Agent	<a href="#">2 members</a>	Real Estate, Moving & Storage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	231	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Restaurant	<a href="#">16 members</a>	Restaurants, Food & Beverages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	230	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Retail & Gifts	<a href="#">6 members</a>	Shopping & Specialty Retail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	224	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>
	Title Services	<a href="#">4 members</a>	Real Estate, Moving & Storage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	232	<input type="checkbox"/>	<a href="#">add attributes</a>	<a href="#">Edit</a>

▶ Add a New Top-Level Category
▶ Remove Selected Items

# Manage the QuickLinks

1. Click on Setup in the left-hand side of the screen
2. Click on Define Business Categories
3. Click on QuickLink Categories at the bottom of the page
4. To edit a Quicklink click in the text box and make your update
5. Add in a new Quicklink click Add a New QuickLink Category
6. To remove a Quicklink category check the box on the right hand side and click Remove at the top of that column
7. The Categories page will let you know how many categories are tied to this Quicklink.

QuickLink Categories					
QuickLink Name	Categories	POI Category	POI Sub-Category	remove	ID
Advertising & Media		Professional Services	▼	<input type="checkbox"/>	26
Agriculture, Fishing & Forestry			▼	<input type="checkbox"/>	27
Arts, Culture & Entertainment			▼	<input type="checkbox"/>	28
Automotive sales and service	<a href="#">1 categories</a>	Auto	▼	<input type="checkbox"/>	29
Business & Professional Services			▼	<input type="checkbox"/>	30
Constructions and building services	<a href="#">1 categories</a>		▼	<input type="checkbox"/>	58
Government, Education & Individuals			▼	<input type="checkbox"/>	35
Health Care & products	<a href="#">2 categories</a>		▼	<input type="checkbox"/>	36
Home & Garden			▼	<input type="checkbox"/>	37
Legal services	<a href="#">1 categories</a>		▼	<input type="checkbox"/>	38
Lodging & Travel	<a href="#">1 categories</a>		▼	<input type="checkbox"/>	39
Manufacturing, Production & Wholesale			▼	<input type="checkbox"/>	40
Personal Services & Care	<a href="#">1 categories</a>		▼	<input type="checkbox"/>	41
Pets & Veterinary	<a href="#">1 categories</a>		▼	<input type="checkbox"/>	42
Public Utilities & Environment			▼	<input type="checkbox"/>	43
Real Estate, Moving & Storage	<a href="#">2 categories</a>		▼	<input type="checkbox"/>	44
Religious Organizations			▼	<input type="checkbox"/>	45
Restaurants, Food & Beverages	<a href="#">2 categories</a>		▼	<input type="checkbox"/>	46
Shopping & Specialty Retail	<a href="#">1 categories</a>		▼	<input type="checkbox"/>	47
Smart Mobile			▼	<input type="checkbox"/>	56
Sports & Recreation			▼	<input type="checkbox"/>	48
<a href="#">▶ Add a New QuickLink Category</a>					

[▶ Save Changes](#)
[▶ Business Categories](#)
[▶ Setup Menu Page](#)



# Manage Membership Types

1. Click **Setup** in the left-hand menu
2. Click **Define Membership Types**



3. Click **Add New Type**

## Membership Types

Current Definitions		
Membership Type	Icon	
Bronze	set icon	X
Gold	★	X
Nonmember	set icon	X
Silver	set icon	X
<b>Add a New Type</b>		

Continue      Cancel

A red arrow points to the 'Add a New Type' button.

4. Type the desired Membership Type
5. Click **Save**
6. Continue adding new types and then click **Continue** when desired Membership Types have been created.