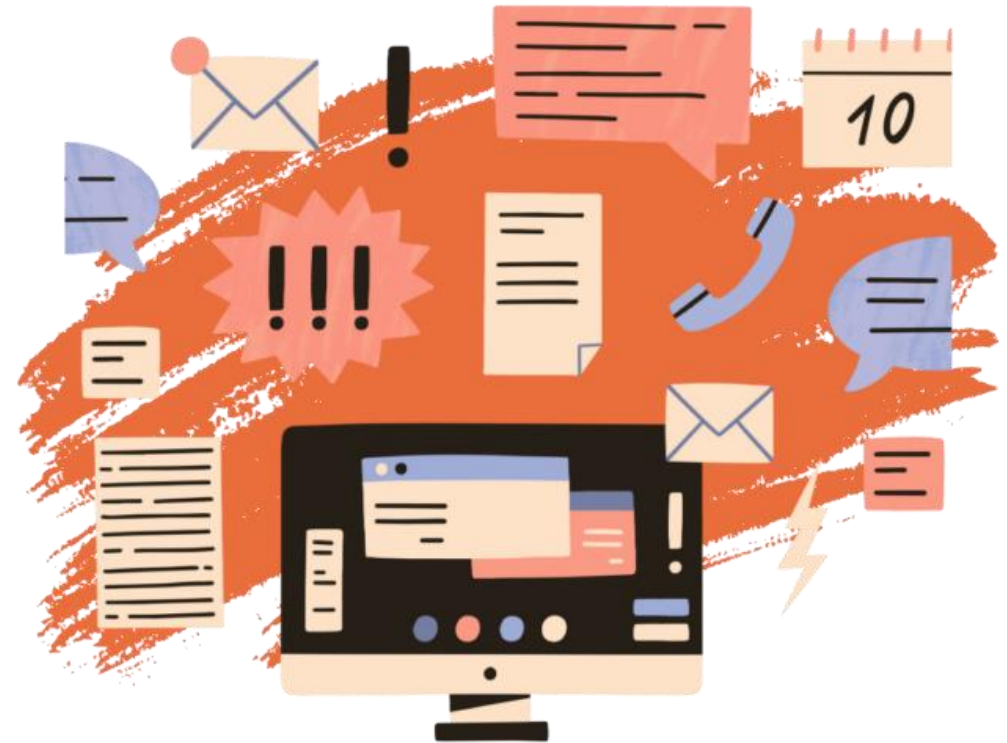


# ChamberMaster/ MemberZone Working with Communications

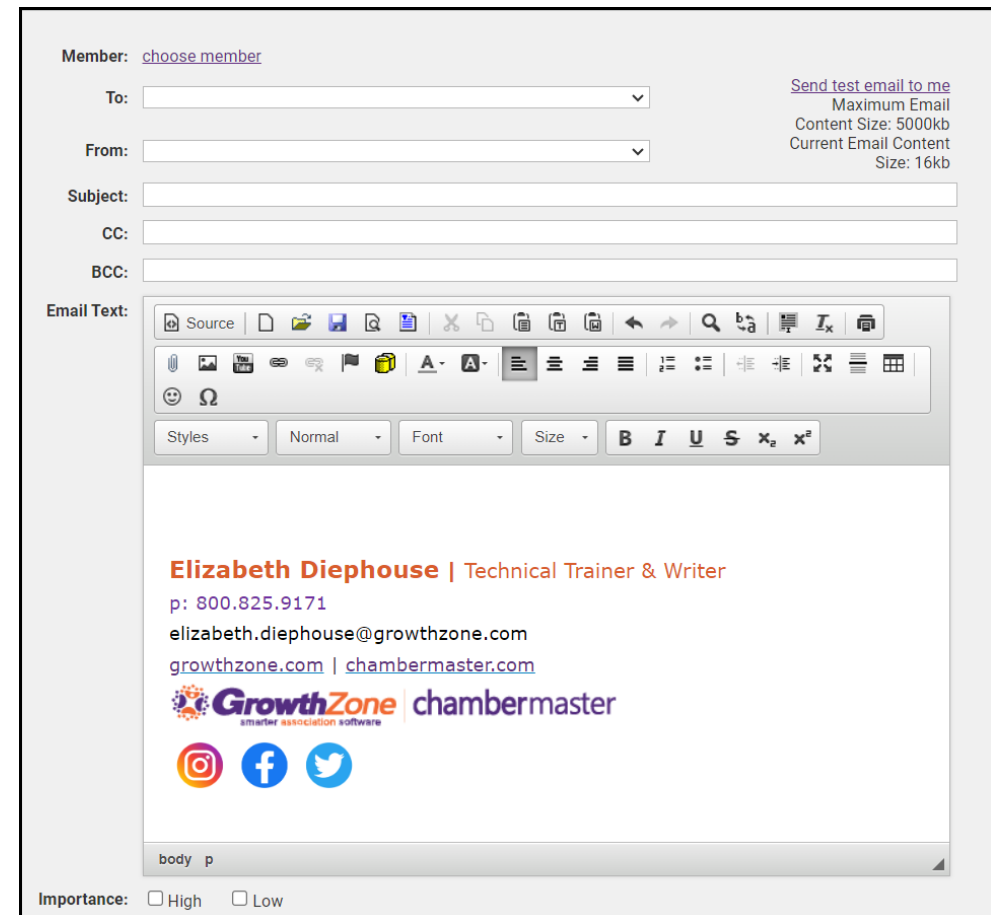
# Agenda

- Email Setup
  - Signature Blocks
  - Email Templates
  - Configure Email Settings
- Sending Emails
  - Individual Emails
  - Mass Emails
- Logging Communications
  - Notes
  - Reminder
  - eReferrals



# Signature Block

- Save time when creating correspondence
- Maintain brand and image
- Included text, images, links, tables, and more
  - Logos
  - Social media icons
  - Scheduling links
- KB: [Create an Email Signature Block](#)



The screenshot shows an email composition interface. At the top, there are fields for 'Member' (set to 'choose member'), 'To', 'From', 'Subject', 'CC', and 'BCC'. A 'Send test email to me' link is visible. Below these fields is the 'Email Text' editor, which includes a rich text toolbar with options for source, undo, redo, bold, italic, underline, strikethrough, text color, background color, font size, and text alignment. The signature block itself is displayed in the editor area and includes the following text and elements:

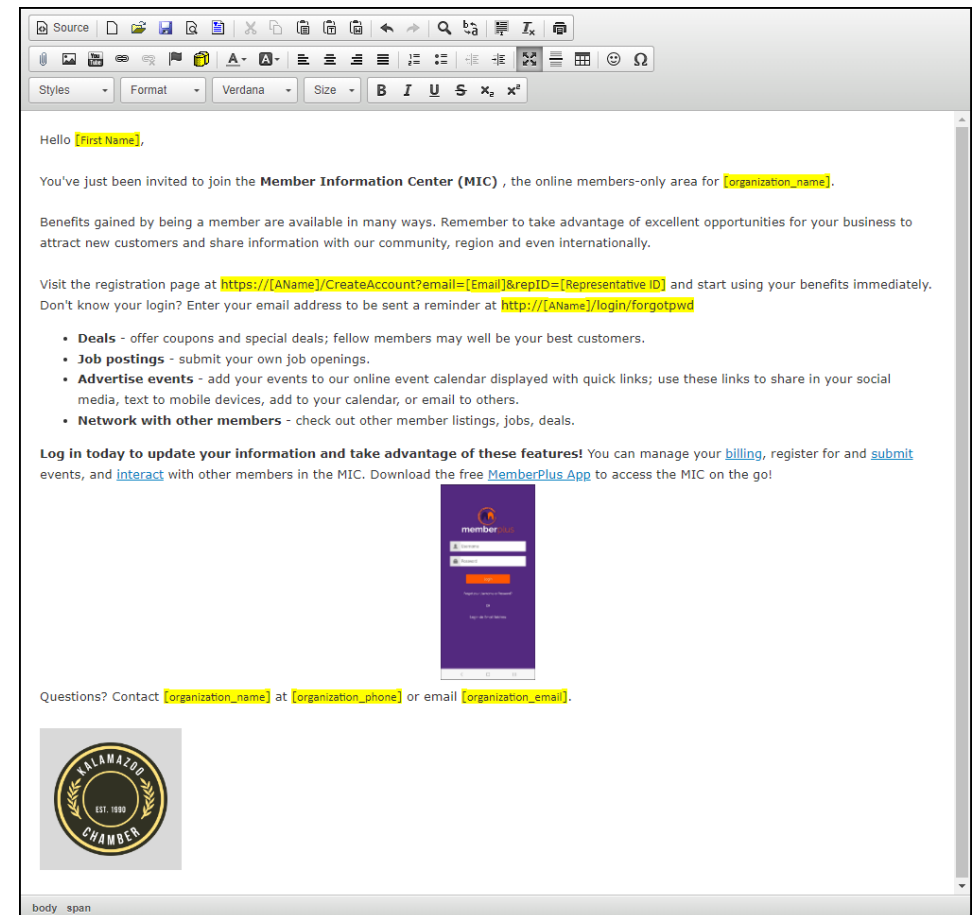
**Elizabeth Diephouse** | Technical Trainer & Writer  
p: 800.825.9171  
elizabeth.diephouse@growthzone.com  
growthzone.com | chambermaster.com

The signature block also features the GrowthZone logo (with the tagline 'smarter association software') and the ChamberMaster logo, along with social media icons for Instagram, Facebook, and Twitter.

At the bottom of the editor, there is a status bar showing 'body p' and an 'Importance' section with radio buttons for 'High' and 'Low'.

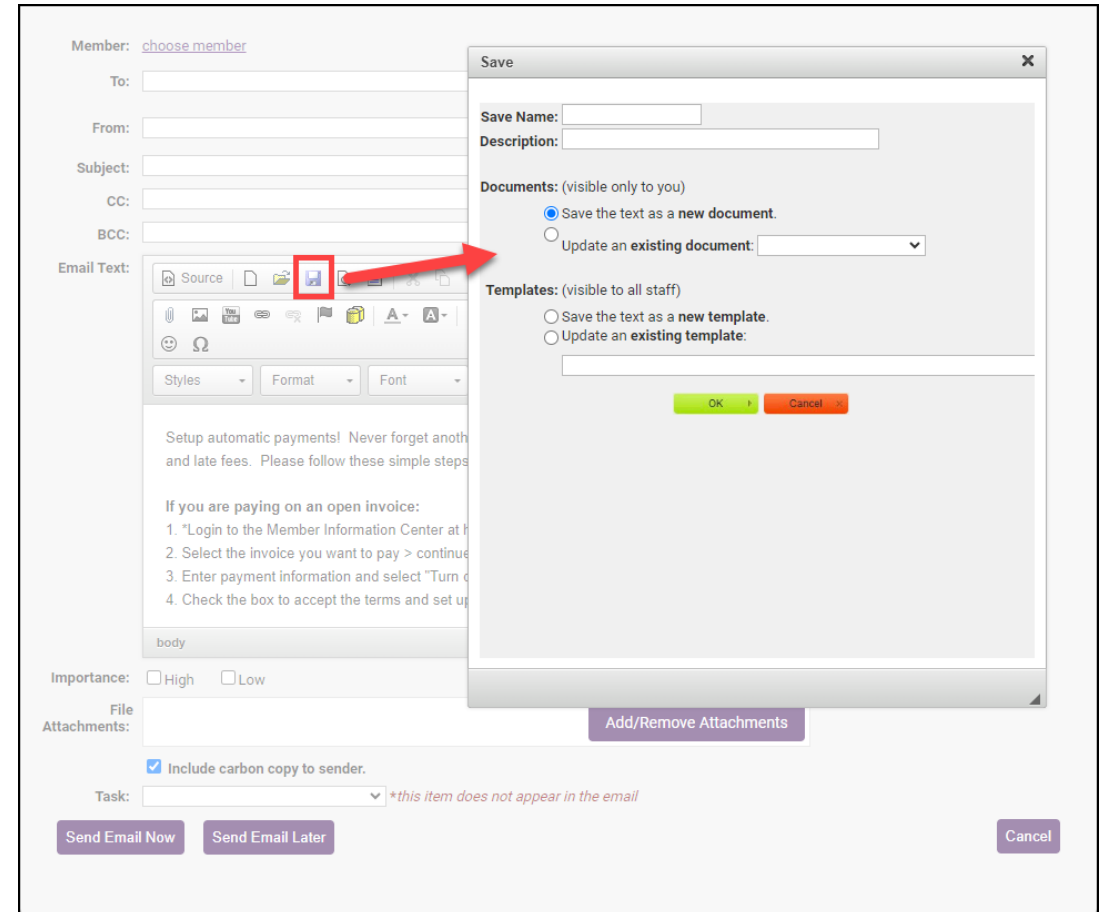
# Email Templates

- Predefined templates provided
  - Select and save to your own list of templates
- Use templates “as is” or customize
  - Save with your own name
  - Available to all staff to use
- KB: Work with Email Templates



# Template vs. Document

- Documents visible only to you
  - Commonly used for email signature blocks
- Templates visible to all staff
  - Ensure consistency in communications
  - Update for everyone quickly



The screenshot shows an email composition window with a 'Save' dialog box overlaid. The 'Save' dialog box has the following options:

- Save Name:** [Text input field]
- Description:** [Text input field]
- Documents: (visible only to you)**
  - Save the text as a new document.
  - Update an existing document: [Dropdown menu]
- Templates: (visible to all staff)**
  - Save the text as a new template.
  - Update an existing template: [Text input field]

Buttons: OK (green), Cancel (red)

Background email form fields include: Member: choose member, To: [Text input], From: [Text input], Subject: [Text input], CC: [Text input], BCC: [Text input], Email Text: [Rich text editor with Source, Insert, Format, Font tabs], Importance: [High/Low checkboxes], File Attachments: [Text input], Task: [Dropdown menu], Send Email Now, Send Email Later, Cancel buttons.

# Database Fields

- Creates personalized, unique communications
  - Personalized emails lead to higher open rates
- Easily personalize emails sent to hundreds of recipients
- Insert database field within your emails
- KB: [Personalize Communication with Database Fields](#)

Dear Johnson Insurance,

Do you want to move slow-moving merchandise?

Do you have a special to advertise?

Do you want to grab the eye of visitors on the Kalamazoo Area Chamber web site?

**Submit your deals now** in the Member Information Center by logging in at <http://kalamazoo00/login>.

Also, check out some additional opportunities:

- **Deals** - offer coupons and special deals; fellow members may well be your best customers.
- **Job postings** - submit your own job openings.
- **Advertise events** - add your events to our online event calendar displayed with quick links; use these links to share in your social media, text to mobile devices, add to your calendar, or email to others.
- **Network with other members** - check out other member listings, jobs, deals.

Login today at <http://kalamazoo00/login> to gain access to all of these features, update your information and more.

Don't know your login? Enter your email address to be sent a reminder at <http://kalamazoo00/login/forgotpwd>

Please contact us with questions or for more information.

Sincerely,

**Kalamazoo Area Chamber**

1903 W Michigan Ave

(800) 867-5309

kzooinfo@mailinator.com

[Check out our website!](#)



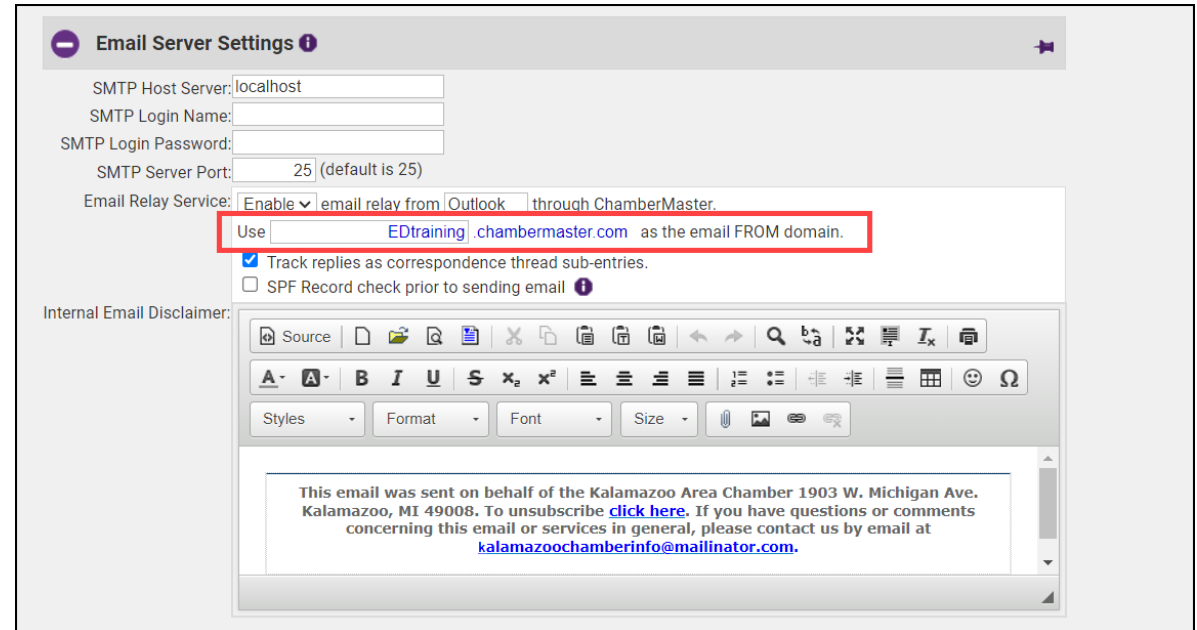
# Email Sending Options

- Both methods maintain record in Communication History in database
- **Outlook**
  - Access to additional email addresses not in your database
  - May add additional CCs and BCCs
  - Familiarity
- **ChamberMaster**
  - Easy access if already logged in
  - Gives access to current addresses in your database
  - Ability to create “mail merge” emails
  - Ability to embed attachments as links
  - Ability to use templates
  - Ability to schedule the email for future delivery (for users of the Plus edition or greater)
- KB: [Email Sending Options](#)



# Archive Emails

- Archive emails (record) in the database even when not logged in
  - Include your association's unique archive address in BCC
  - **archive@yourname**
  - Software will receive the email, look at the address sent/replied to and place in communication history of associated member
- KB: [Archive Emails](#)



The screenshot shows the 'Email Server Settings' window in ChamberMaster. The 'Email Relay Service' section is highlighted with a red box, showing the following configuration:

- SMTP Host Server: localhost
- SMTP Login Name: [empty]
- SMTP Login Password: [empty]
- SMTP Server Port: 25 (default is 25)
- Email Relay Service: Enable (dropdown) email relay from Outlook through ChamberMaster.
- Use EDtraining.chambermaster.com as the email FROM domain. (highlighted in red)
- Track replies as correspondence thread sub-entries.
- SPF Record check prior to sending email

The 'Internal Email Disclaimer' section contains a rich text editor with the following text:

This email was sent on behalf of the Kalamazoo Area Chamber 1903 W. Michigan Ave. Kalamazoo, MI 49008. To unsubscribe [click here](#). If you have questions or comments concerning this email or services in general, please contact us by email at [kalamazoochamberinfo@mailinator.com](mailto:kalamazoochamberinfo@mailinator.com).



# Sending Emails

- Emails may be sent from many different places in the software - anywhere you find the email editor is found
  - Member module
  - Communicates module
  - Events module
- Email Designer
- KB: Communications



The screenshot shows a newsletter email template for the Green Valley Chamber of Commerce. At the top left is the logo, which consists of a green leaf icon and the text "Green Valley CHAMBER OF COMMERCE". Below the logo, the main heading "Spring Has Arrived!" is written in a large, dark, cursive font. Underneath this, "May Newsletter" is written in a smaller, plain font. A short paragraph of text follows: "The birds are chirping and the leaves are budding. Spring is in the air here at Green Valley Chamber of Commerce!". Below this text is a horizontal line. Under the line, the section "Green Valley Member News:" is highlighted in green. To the left of this section is a small image of two hands shaking. To the right of the image, the text "NEW MEMBERS" is displayed in green. Below this, there is a light blue dashed box containing the text "New Members" in blue, followed by "Click here and select the options from the right." in a smaller blue font. At the bottom right of the dashed box is an orange button with the text "View Member Directory" in white.

# Sending Mass Emails

- Easily select multiple email recipients
  - Filter options available
- Create targeted email communications
  - Tailor content for each group
  - Better engagement
  - Improved deliverability
  - Reduce unsubscribe rates

**Choose Contacts**

**1** **Select addresses using these selections**

**Add Members**

- ▶ Add members by membership status
- ▶ Add members by membership type
- ▶ Add members by directory category
- ▶ Add members by name
- ▶ Add members by event

**Add Representatives:**

- ▶ Add representatives by type/status
- ▶ Add representatives by membership type
- ▶ Add representatives by group
- ▶ Add representatives by name
- ▶ Add representatives by event

**Add Others**

- ▶ Add a new contact
- ▶ Add non-member by event
- ▶ Add all by event
- ▶ Add sponsors by event

**2** **Select the delivery method using these selections**

**Distribute By:**

- Mail Only
  - \*Mailing address is invalid (12) [remove](#)
  - \*Contact has no email address (123) [remove](#)
  - \*Email address occurs multiple times (9) [remove](#)
  - \*Unsubscribed from mass emails (1) [remove](#)
- Email Only
- Fax Only
  - \*Contact has no fax number (179) [remove](#)
- Preferred Communication Type
  - \*Insufficient contact info (9) [remove](#)

Total Contacts: 311  
Maximum Email Content Size: 32kb

**3** **Click Continue**

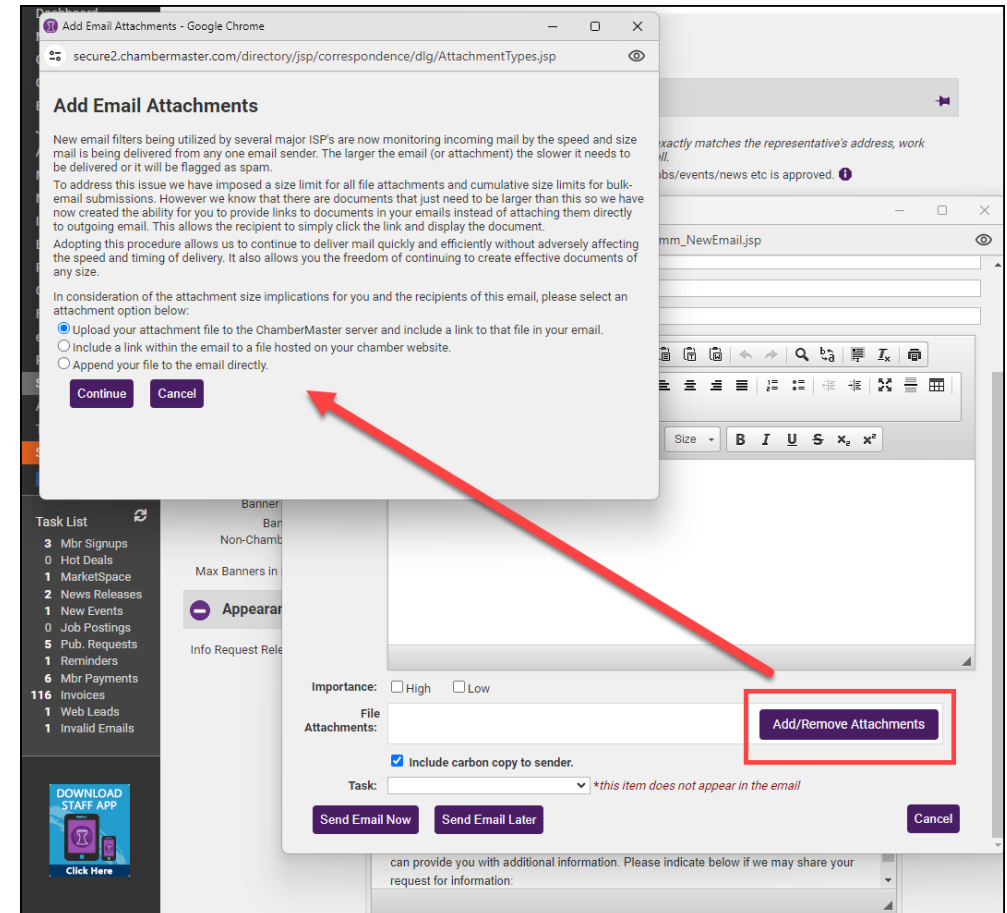
[Continue](#) [Cancel](#) [Clear List](#)

**Distribution List**

Company	Rep Name	Pref.	Email	Mail	Fax
<a href="#">Aamber's Attic</a>		Email	Yes	Yes	No
<a href="#">Always on Top</a>		Email	Yes	Yes	No
<a href="#">American Legion</a>		Email	Yes	Yes	No
<a href="#">American Municipal Power</a>		Email	Yes	Yes	No
<a href="#">American Red Cross, Henry County Chapter</a>		Mail	No	Yes	No
<a href="#">Ames Aviation</a>		Email	Yes	Yes	Yes
<a href="#">B &amp; B Molded Products</a>		Email	Yes	Yes	Yes
<a href="#">Behm, Ron</a>		Email	Yes	Yes	No
<a href="#">Best Western Inn &amp; Suites-Napoleon</a>		Email	Yes	Yes	Yes
<a href="#">Better Business Bureau</a>		Mail	No	Yes	No
<a href="#">Black Swamp Area Council BSA</a>		Mail	No	Yes	Yes
<a href="#">Black Swamp Equipment</a>		Email	Yes	Yes	No
<a href="#">Black Swamp Extermination</a>		Email	Yes	Yes	No

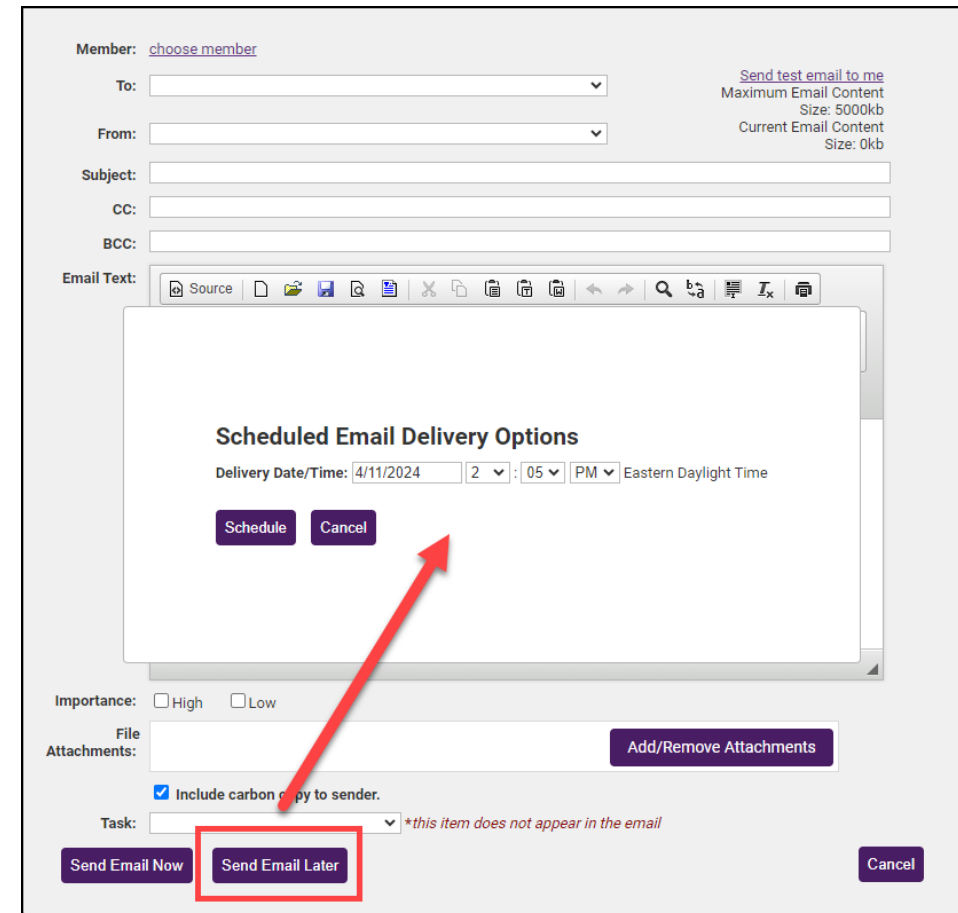
# Attachments

- Upload attachment file to ChamberMaster server and include link
  - Recommended method
- Attaching file directly to email suspicious to spam filters
  - Can lead to emails not reaching members
- Reasons Emails Don't Get to Members



# Schedule an Email

- Schedule email to be sent at later date/time
    - Use Email Status Summary Report to be more effective with communications
    - Test and analyze to see what timing works best
  - Use to avoid sending emails on weekends and holidays
    - Avoid Monday mornings and Friday afternoons
- \* Available for **Plus** edition or greater



Member: [choose member](#)

To:

From:

Subject:

CC:

BCC:

Email Text:

[Send test email to me](#)  
Maximum Email Content Size: 5000kb  
Current Email Content Size: 0kb

**Scheduled Email Delivery Options**

Delivery Date/Time: 4/11/2024 2:05 PM Eastern Daylight Time

Importance:  High  Low

File Attachments:

Include carbon copy to sender.

Task:  \*this item does not appear in the email

# Email Open Rates

- Email Status Summary Report
- Every chamber should be tracking open rates!
- Track if emails are being delivered and opened
  - Number of emails sent
  - Number of opens
    - Open Rates impact Sender Reputation
- Full Details
  - First Open
  - Most Recent Open
  - Total Opens
  - Error Types

Communication

Correspondence Tracking

Email Delivery Status

Filter Options

Sent Date: 12/15/2023 Through: 12/15/2023

Sender: [Dropdown] Task/Category: [Dropdown]

Refresh Report Print Report Print PDF Download Report Reset Options

Subject Line	Sent Date	Sender	Delivery Statistics
[Redacted]	12/15/2023 10:23:00am	[Redacted]	30 messages queued 30 sent* (100%) 17 opened (57%) <a href="#">View Full Details</a>
[Redacted]	12/15/2023 10:23:00am	[Redacted]	20 messages queued 20 sent* (100%) 8 opened (40%) <a href="#">View Full Details</a>
[Redacted]	12/15/2023 10:23:00am	[Redacted]	31 messages queued 31 sent* (100%) 14 opened (45%) <a href="#">View Full Details</a>
[Redacted]	12/15/2023 10:24:00am	[Redacted]	1 message queued 1 sent* (100%) 0 opened (0%) <a href="#">View Full Details</a>
[Redacted]	12/15/2023 10:24:00am	[Redacted]	1 message queued 1 sent* (100%) 0 opened (0%) <a href="#">View Full Details</a>
[Redacted]	12/15/2023 10:24:00am	[Redacted]	1 message queued 1 sent* (100%) 0 opened (0%) <a href="#">View Full Details</a>

# Logging Communications

- Communication history
  - Emails automatically logged on the Communication tab of the member's record
- Phones calls can be manually added
- When letters or fax output is printed, can include an entry in Communication history
- KB: View and Record Communication History

The screenshot shows the 'Diephouse Realty' member record interface. The 'Communication' tab is highlighted in red. Below the navigation tabs, there is a 'Member Correspondence' section with filter options. The filters include 'Date From' (12/9/2022), 'Through' (12/29/2022), 'Member Rep', 'Tasks/Categories', and 'Staff Contact'. There is a checkbox for 'Display bulk mail correspondence entries in the table below' which is checked, and a 'Display' dropdown set to '100 results per page'. Below the filters are buttons for 'Refresh Listing', 'Clear Filters', 'New Communication', and 'Reports'. A note states: 'Email dates listed below are based on the date sent from the Central time zone server (GMT-06:00). Click into the email to view the date/time in your own time zone.' Below this is a table of correspondence history with columns: Subject, Date, Follow-Up, Task, Contact, and Association Rep. The table shows three entries for 'Harvest Festival 2023' and 'Business Expo'.

Subject	Date	Follow-Up	Task	Contact	Association Rep
Confirmation: Harvest Festival 2023	12/22/2022	<a href="#">add follow-up</a>		Mary West	
Get ready for the Harvest Festival 2023	12/22/2022	<a href="#">add follow-up</a>		Mary West	Elizabeth Diephouse
Get ready for the Business Expo	12/22/2022	<a href="#">add follow-up</a>		Mary West	Elizabeth Diephouse

# Phone Calls and Notes

- Phones calls and notes can be manually added to member's Communications History
- Create follow-up reminders
- KB: Log a Call or a Note

The screenshot shows the 'Member Correspondence' interface for 'Diephouse Realty'. The page includes filter options for 'Date From' (12/9/2022), 'Through' (12/29/2022), 'Member Rep', 'Tasks/Categories', and 'Staff Contact'. There are buttons for 'Refresh Listing', 'Clear Filters', 'New Communication', and 'Reports'. A dropdown menu is open under 'New Communication', listing options: 'Email with ChamberMaster', 'Email with Outlook', 'Log a Call or Note', 'Send an eReferral', 'Notes and Follow-Up', and 'Print Mailing Label'. The interface also shows 'Display 100 results per page' and a note about email dates being based on the date sent from the Central time zone.

# eReferrals

- eReferrals designed to accomplish two tasks with a single entry:
  - Give desired information about members to a consumer
  - Let members know that they've been referred
- eReferrals are automatically logged
- KB: Refer a Member Using eReferral

**Customer Referral from Kalamazoo Area Chamber** ✕

The Kalamazoo Area Chamber was pleased to refer your business to a customer. More information about the customers request and contact information can be found below.

---

**Potential Customer**

Name: Mr. New Customer	Contact Pref: Not Specified
Company:	
Phone: 867-5309	
Email: <a href="mailto:newbusiness@mailinator.com">newbusiness@mailinator.com</a>	

---

Referral generated Fri, March 03, 2023 10:34:44 AM

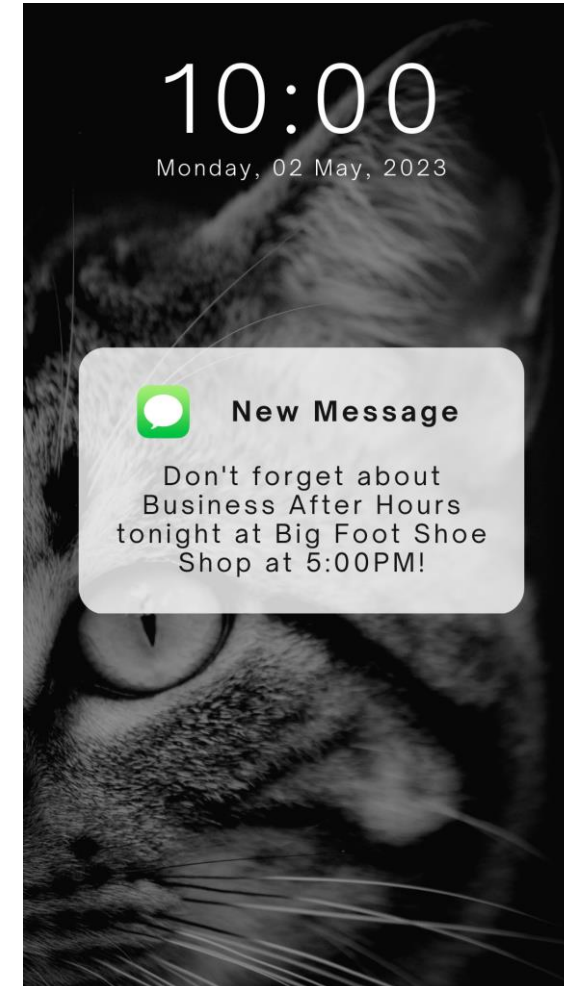
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This email was sent on behalf of the Kalamazoo Area Chamber 1903 W. Michigan Ave. Kalamazoo, MI 49008. To unsubscribe [click here](#). If you have questions or comments concerning this email or services in general, please contact us by email at [kalamazoochamberinfo@mailinator.com](mailto:kalamazoochamberinfo@mailinator.com).



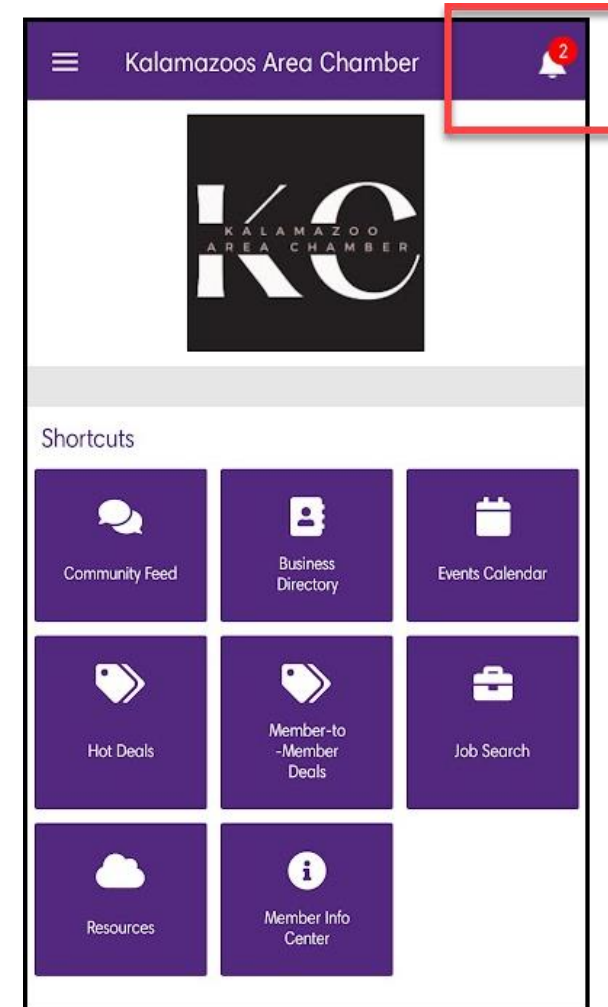
# SmartText

- Group text messaging
  - Allows you to contact your members, community, or other individuals via group text messaging.
- Promote your own events or gain non-dues revenue by offering the service to your members at a fee
- Create keyword, share it with members to allow them to sign up
- Create subscriber groups
- KB: [SmartText](#)



# Push Notifications

- Fast, efficient way to communicate with your members in MemberPlus App
- Send real-time updates and reminders
  - Members regularly engage with you, even if they're not aware of it
- Target the right members
  - Send to just individual groups, or to all your members
- KB: [Push Notifications](#)

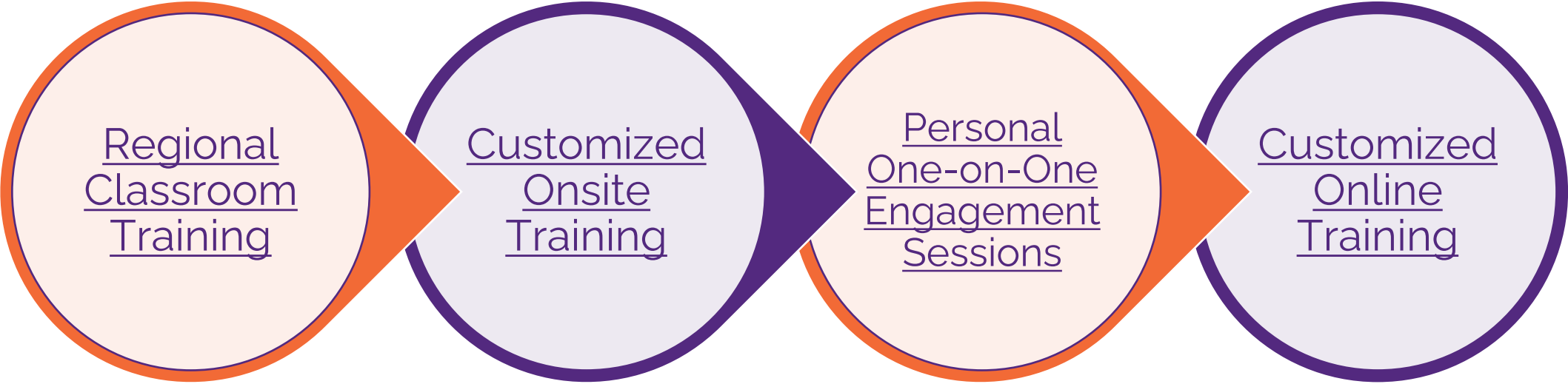


# Training Resources



# Expanded Training Offerings

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# Questions?