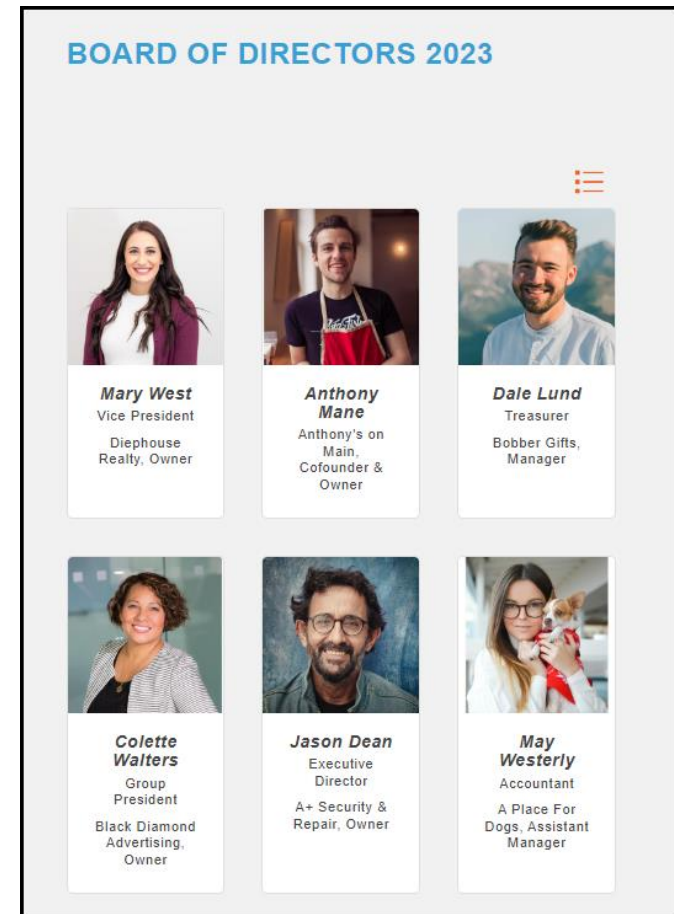


ChamberMaster/ MemberZone Working with Groups

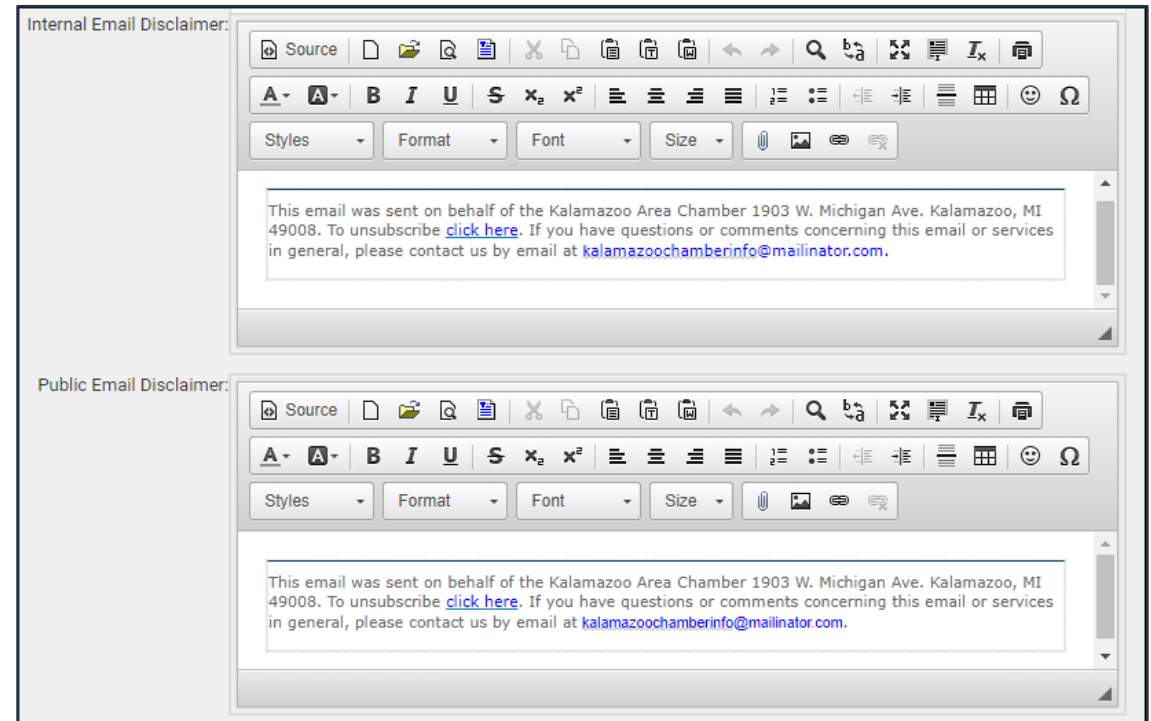
Agenda

- Opt-out Disclaimer
- Creating Groups
 - Group Visibility
 - Public
 - Member Information Center (MIC)
 - Custom Fields
 - Group Types
- Managing Group Roster
- Managing Unsubscribes
- Group Fees
- Creating Groups from Custom Reports



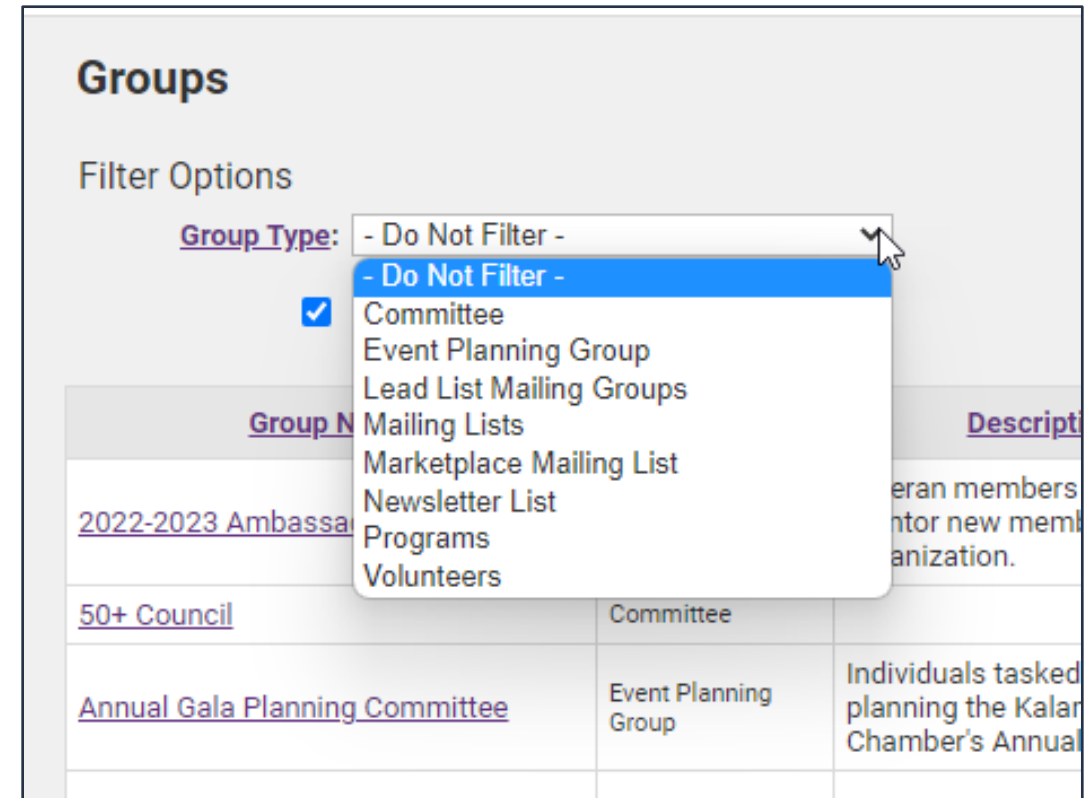
Email Opt-out Message

- Opt-out message displays at the bottom of emails sent from groups
- Default messages have been configured for you
 - Can be customized
- Note: Don't modify unsubscribe link
- KB: Unsubscribe Options



Group Types

- Group types makes it easy to organize and filter
- Can create group types in advance or as needed
 - Committee
 - Mailing Lists
 - Volunteer List
 - Diversity Council, etc.
- KB: Group Types



The screenshot shows a web interface titled "Groups" with a "Filter Options" section. A dropdown menu is open for the "Group Type" filter, showing a list of options: "- Do Not Filter -", "Committee" (checked), "Event Planning Group", "Lead List Mailing Groups", "Mailing Lists", "Marketplace Mailing List", "Newsletter List", "Programs", and "Volunteers". Below the dropdown, a table lists various groups with their corresponding types and descriptions.

Group Name	Group Type	Description
2022-2023 Ambassador		Senior members monitor new member organization.
50+ Council	Committee	
Annual Gala Planning Committee	Event Planning Group	Individuals tasked planning the Kalar Chamber's Annual

Create a Group

- Different ways to populate group
 - Group module
 - Roster tab
 - Member module
 - Group Participation
 - Report module
 - Custom Reports
- KB: Create a Group

Create a New Group

Group Name:

Group Type: ▼

Status: ▼

Synch this group with constant contact. ?

Description:

Add Members to Group

- Add members by:
 - Type/status
 - Category
 - From other Groups
- Can be added from Group's Roster tab or from member's Reps tab
- KB: [Add Reps to Groups](#)

The screenshot shows the 'Groups' page in the Chambermaster Memberzone system. The 'Roster' tab is selected, displaying the 'Group Roster: Fall Festival Planning Committee 2023'. Below the title, there is a section for 'Add Group Members' with several options: 'add representatives by type/status', 'add representatives by member', 'add representatives by category', 'add representatives from other groups', 'add individual representatives', and 'add specific reps by member name'. There is also a 'Filters' section with a checkbox for 'Show disabled group members.' and a row of buttons: 'Print List', 'Print PDF', 'Download List', 'Contact Members', and 'Add/Edit Roster Custom Fields'. At the bottom, there is a 'Display 25 results per page.' dropdown and a table titled 'Group Membership Roster: Fall Festival Planning Committee 2023'.

	Contact	Company Name	Group Role	Notes	Fees	
+	Colette Walters	Black Diamond Advertising		email: colette@mailinator.com phone: (999) 999-9999	200.00	<input type="checkbox"/>
+	Anthony Mane	Anthony's on Main		email: anthony@mailinator.com phone: (987) 654-3210	200.00	<input type="checkbox"/>

Disable/Remove Reps from Group

- Disable a rep – they remain in group, but will not receive group emails
 - Recommended
- Remove a rep – permanently removed from group
 - No record of participation in group
 - Not recommended

Display 25 results per page.

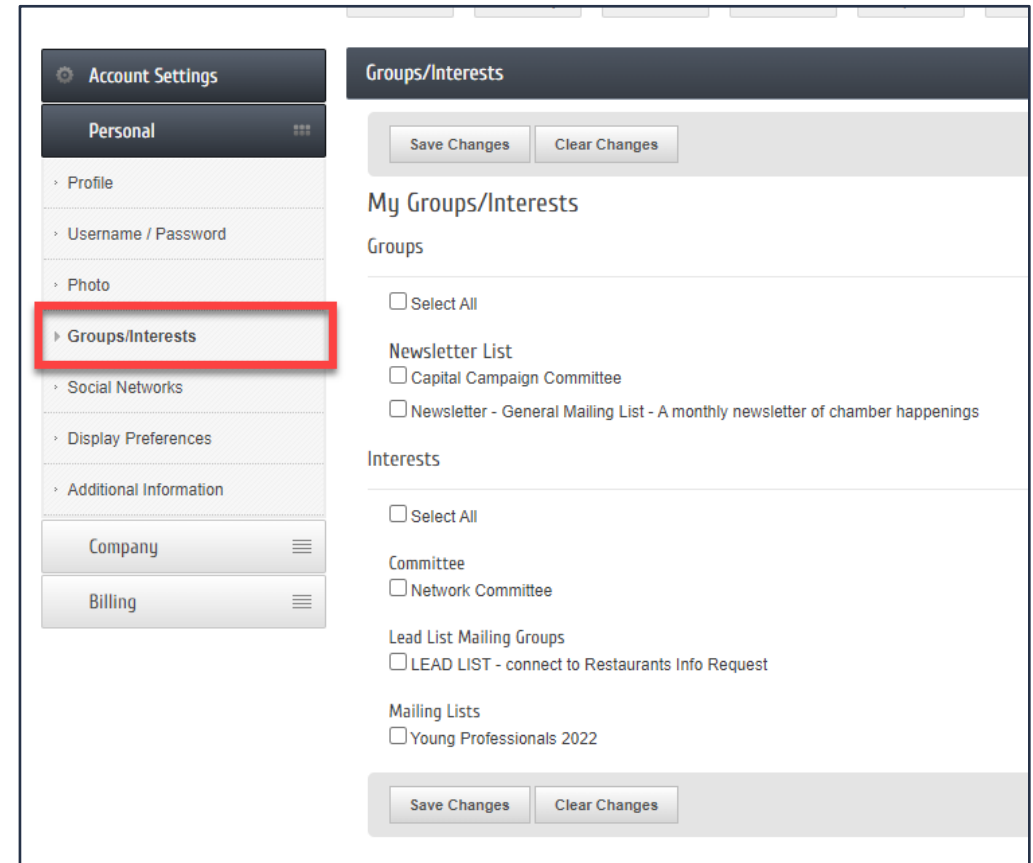
Group Membership Roster: 2019 Ambassadors

Contact	Company Name	Group Role	Notes	Fees	
Audra Winters	Get Pretty		email: audra@mailinator.com phone: (505) 801-2067	120.00	<input checked="" type="checkbox"/>
Chad Bring	A Place for Dogs		email: chady@mailinator.com phone: (414) 870-2258	120.00	<input checked="" type="checkbox"/>
Quinn Hanson	Chewy Chewy		email: qhanson@mailinator.com	120.00	<input type="checkbox"/>
Captain Jan Keane	Big Fish Charters		email: keane@mailinator.com phone: (585) 222-2222	120.00	<input type="checkbox"/>
Paul Macaroon	Macaroons		email: paul@mailinator.com	120.00	<input type="checkbox"/>
Joe Hanson	Lakeshore Marina		email: deanh@mailinator.com	120.00	<input type="checkbox"/>

Save Roster Order Disable Selected Contacts Remove Selected Contacts

Allow Members to Join Group via MIC

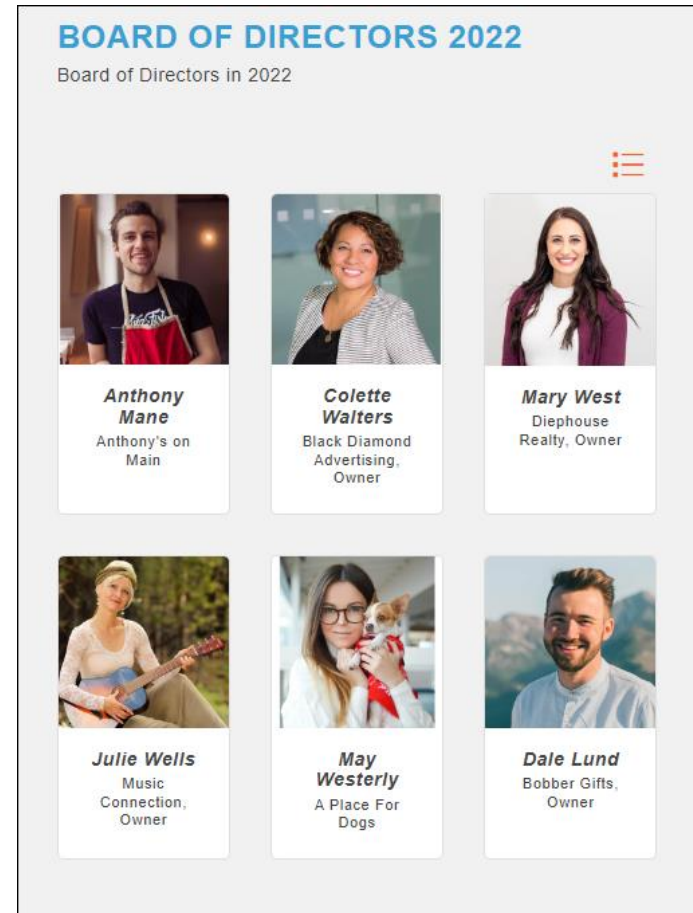
- Allow members to join or remove themselves from groups
- Able to select the desired groups when member logs into the Member Information Center
 - Independently maintain participation
 - Keeps mailing lists up to date
- KB: Allow Members to Join Group



The screenshot displays the 'Account Settings' page in the Member Information Center. The left sidebar contains a menu with the following items: Personal, Profile, Username / Password, Photo, **Groups/Interests** (highlighted with a red box), Social Networks, Display Preferences, Additional Information, Company, and Billing. The main content area is titled 'Groups/Interests' and includes 'Save Changes' and 'Clear Changes' buttons at the top. Below this, there are sections for 'My Groups/Interests', 'Groups', 'Newsletter List', 'Interests', and 'Mailing Lists'. Each section contains a 'Select All' checkbox and a list of items with checkboxes. For example, under 'Groups', there is a 'Select All' checkbox and a list of groups. Under 'Newsletter List', there is a 'Select All' checkbox and a list of newsletters. Under 'Interests', there is a 'Select All' checkbox and a list of interests. Under 'Mailing Lists', there is a 'Select All' checkbox and a list of mailing lists. At the bottom of the main content area, there are 'Save Changes' and 'Clear Changes' buttons.

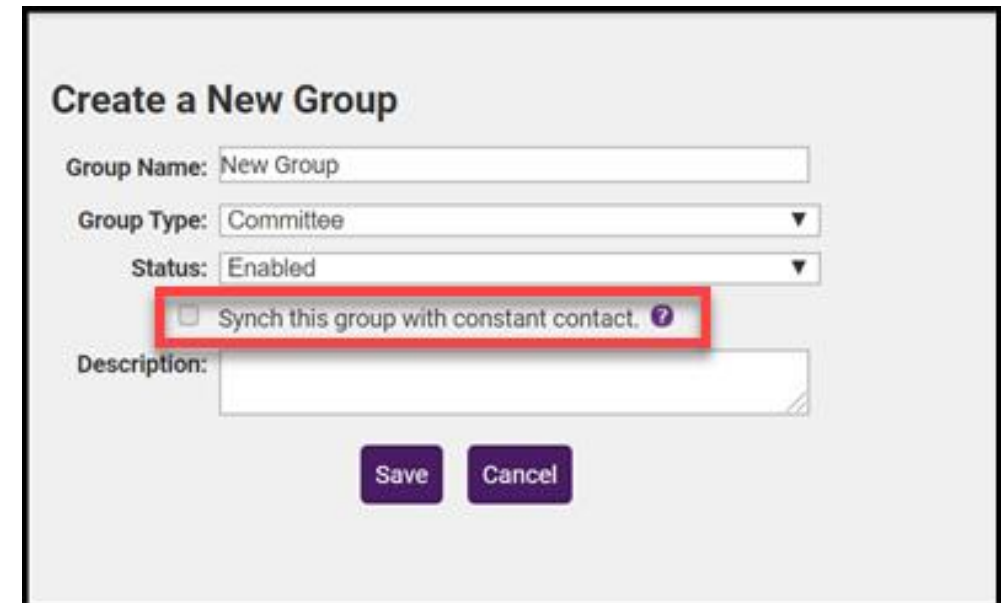
Allow Public to Join Group

- Group can be marked to display on public website
- Can allow public to join group via public website
 - Any group can include this setting
 - Public module on website
- KB: Allow Public to Join Group



Sync Group with Constant Contact

- Connect your Constant Contact account
 - Automate updates to your Constant Contact lists based on updates made in database
- Synchronization will occur between 1am and 6am CST
- Choose to synchronize any or all the following:
 - Automatically sync all active reps for active and courtesy members.
 - Automatically sync membership types daily
 - Automatically sync groups daily
- KB: [Constant Contact Synchronization](#)



Create a New Group

Group Name:

Group Type:

Status:

Sync this group with constant contact. ?

Description:

Group Custom Fields

- Track information specific to representatives in your groups
- Group custom fields are for internal use only
- KB: Group Custom Fields

New Custom Field

Field Name:

Public Display Text: *Leave blank to use the Field Name*
[edit](#)

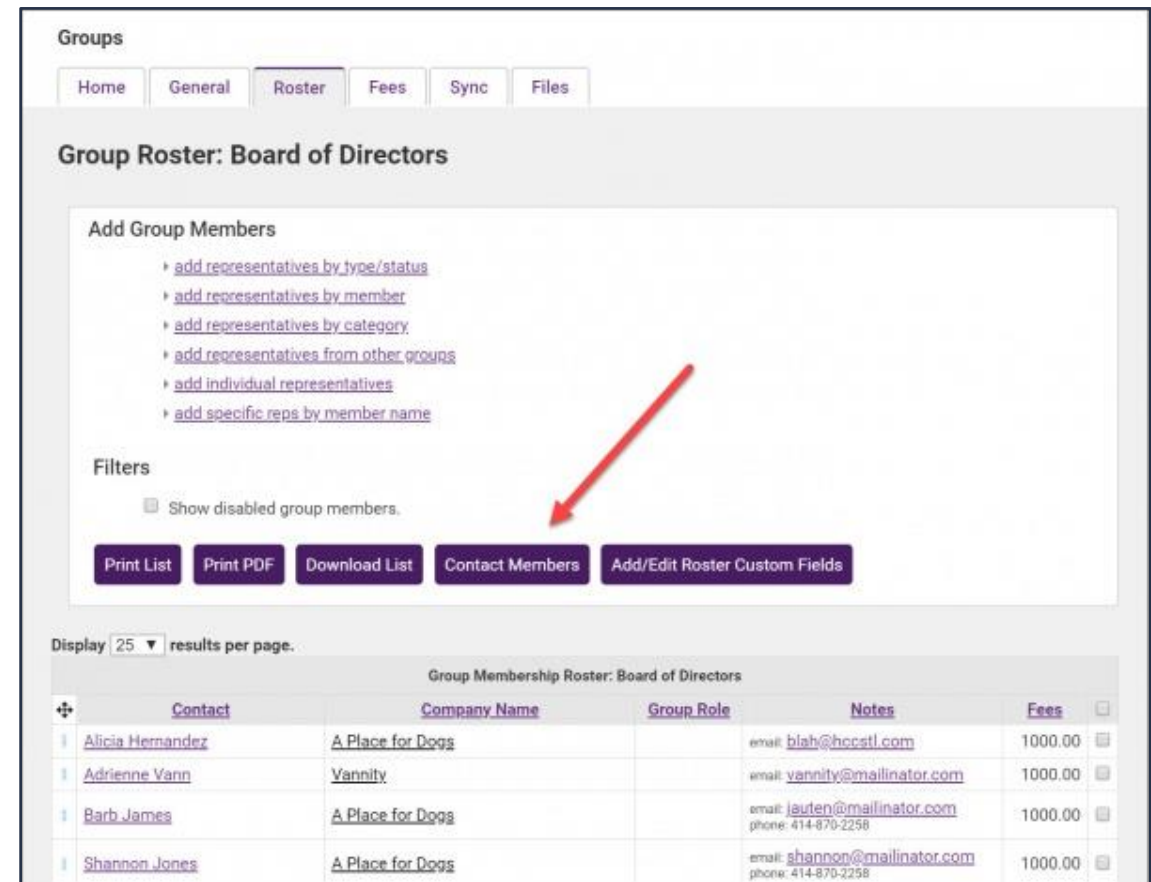
Data Type:

Visible to Public: Required: Limited Quantity: [?](#)

List Items: [Bulk Entry](#)
[?](#)
Item 1:
Item 2:
Item 3:
[+](#)
[?](#) Drag items below to remove them.
[-](#)

Send Group Email

- Communicate with group members quickly
 - Board of Directors
 - Budgeting Committee
 - Volunteer Group, etc.
- Groups for mailing lists
 - Monthly newsletter
- KB: Send Group Email



Groups

Home General **Roster** Fees Sync Files

Group Roster: Board of Directors

Add Group Members

- [add representatives by type/status](#)
- [add representatives by member](#)
- [add representatives by category](#)
- [add representatives from other groups](#)
- [add individual representatives](#)
- [add specific reps by member name](#)

Filters

Show disabled group members.

[Print List](#) [Print PDF](#) [Download List](#) [Contact Members](#) [Add/Edit Roster Custom Fields](#)

Display 25 results per page.

Group Membership Roster: Board of Directors

	Contact	Company Name	Group Role	Notes	Fees	
+	Alicia Hernandez	A Place for Dogs		email: blah@hccstl.com	1000.00	
+	Adrienne Vann	Vannity		email: vannity@mailinator.com	1000.00	
+	Barb James	A Place for Dogs		email: jauten@mailinator.com phone: 414-870-2258	1000.00	
+	Shannon Jones	A Place for Dogs		email: shannon@mailinator.com phone: 414-870-2258	1000.00	

Assign Group Fees

- Fees may be assigned to a group or to certain individuals within the group
 - Monthly luncheon fee
 - Use of conference room for group meeting
- Create groups to accommodate your billing needs
 - Or use groups already created
- KB: Group Billing

Groups

Home General Roster **Fees** Sync Files

Group Fees: Fall Festival Planning Committee 2023

Fee Items for Fall Festival Planning Committee 2023					
Name	Description	Frequency	Next Billed	Amount*	
Meeting Room Fee	Fee for use of meeting room at Town Hall for up to 3 hours.	One-Time	Jan 2023	\$20.00	<input type="checkbox"/>

Assign Fee Items Define Fee Item Types Remove Selected Items

*The annual amount due is listed in the **Amount** column for recurring fee items.

Fee Item Details for Meeting Room Fee

Fee Item Type: Meeting Room Fee

Description: Fee for use of meeting room at Town Hall for up to 3 hours.

Fee Amount: 20.00 (annually or one-time)

Billing Cycle: One-Time

Status: Active

Save Changes Bill Group Now

Group Member Pricing Meeting Room Fee

Manage Unsubscribes

- Public disclaimer included in these emails, includes options for recipient
 - Opt-out of all mass emails
 - Subscribe to other lists
 - Continue to receive emails
- Member can customize which emails they'd like to receive
- KB: Managing Opt-outs

Email Subscriptions

for wpm@mailinator.com

- Continue receiving emails from Kalamazoo Area Chamber
- Unsubscribe me from mass emails*
- Unsubscribe me from all emails
- Login to update my preferences

Submit

*Note: You will still receive emailed billing transactions and any other emails you may be subscribed to separately

[Business Directory](#) / [News Releases](#) / [Events Calendar](#) / [Hot Deals](#) / [Marketspace](#) / [Job Postings](#) / [Contact Us](#) / [Information & Brochures](#) / [Weather](#) / [Join The Chamber](#)

Powered by
GrowthZone

Manage Unsubscribed Email Report

- View list of all members who have unsubscribed from emails
- Can re-subscribe them, if applicable
- KB: Manage Unsubscribed Emails Report

Display 25 results per page.

Group Membership Roster: Board Members

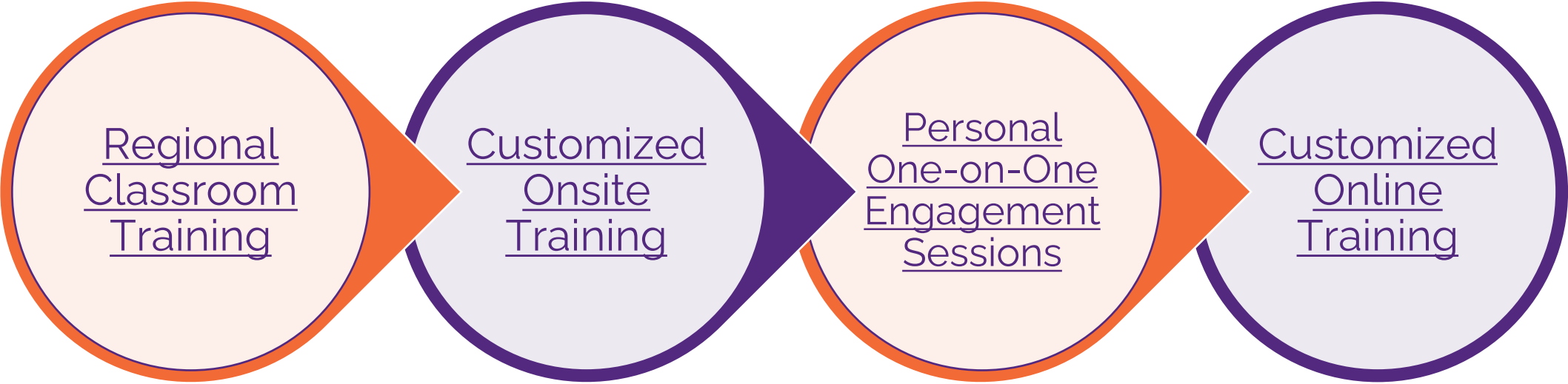
Contact	Company Name	Group Role	Notes
Dorothy Beyer	Beyer's Ace Hardware		email: dorothy@mailinator.com phone: (123) 456-7899
Audra Winters	Get Pretty		email: audra@mailinator.com phone: (505) 801-2067
Greg Lansonne			
Cheri Petterson			email: cheri.petterson@growthzone.com

Save Roster Order Disable Selected Contacts Remove Selected Contacts

Training Resources



Expanded Training Offerings



Questions?