

ChamberMaster/MemberZone Working with Communications & Groups



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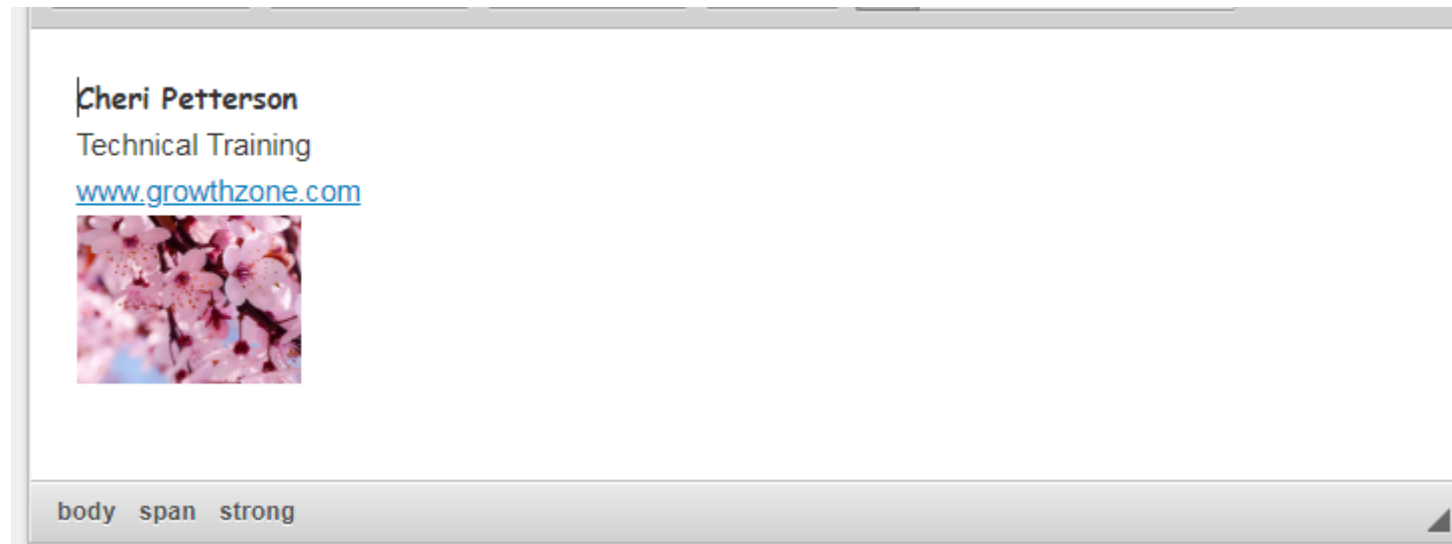


Email Setup

Saving your signature block as a template may save time when creating correspondence

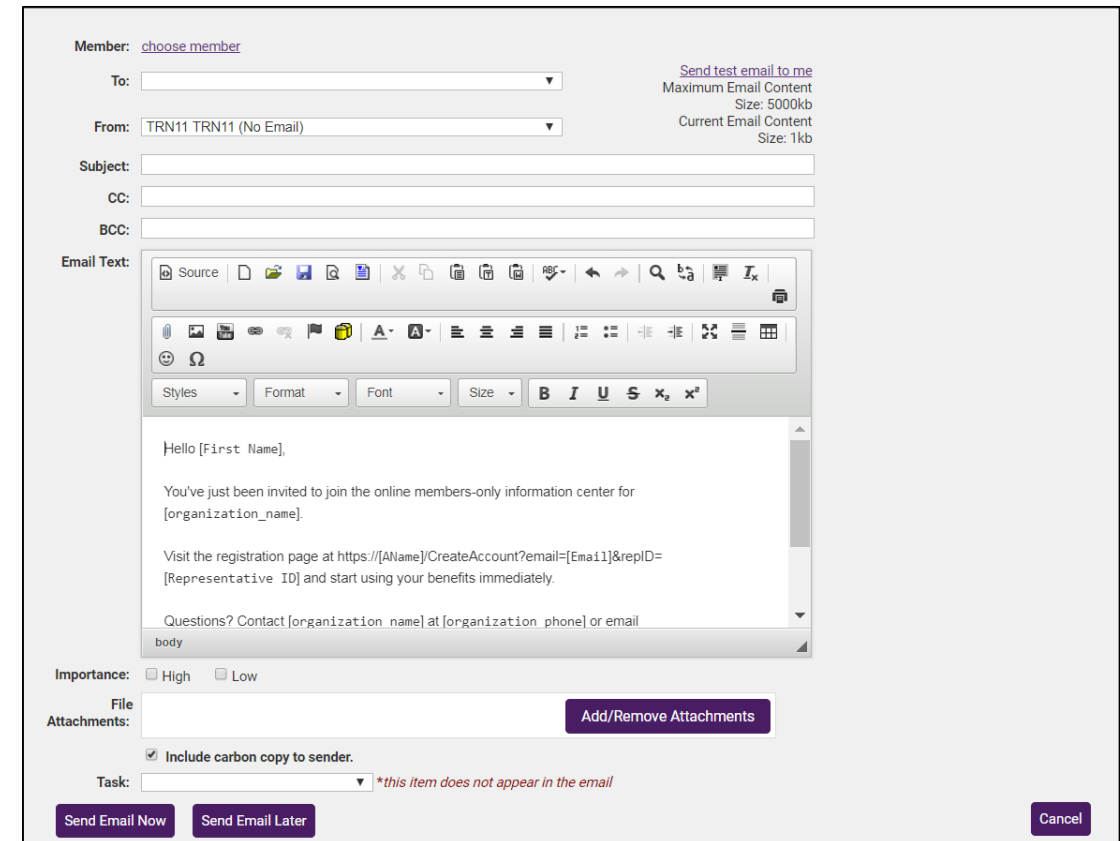
Design your signature block with any included text and graphics. You may also include items that would belong in the header such as your logo

WIKI: [Creating a Signature Block](#)



Email Setup

- Working with Email Templates - a number of predefined templates are provided that may be selected and brought onto your own list of templates
- You may use these templates “as is” or choose to modify and then re-save with your own name
- WIKI: [Working with Templates/Documents](#)

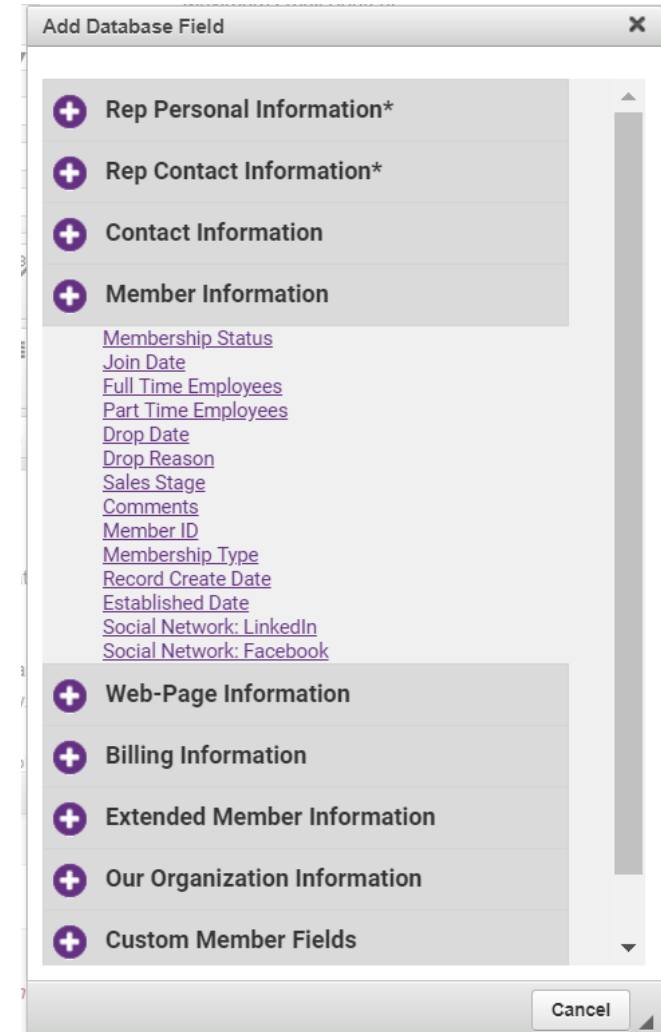


The screenshot shows the 'Email Setup' interface in GrowthZone. At the top, there's a 'Member:' dropdown with a link 'choose member'. Below it are fields for 'To:', 'From:' (set to 'TRN11 TRN11 (No Email)'), 'Subject:', 'CC:', and 'BCC:'. To the right of the 'To:' field, there's a link 'Send test email to me' and information about email content size: 'Maximum Email Content Size: 5000kb' and 'Current Email Content Size: 1kb'. The 'Email Text:' section features a rich text editor with a toolbar containing icons for source, undo, redo, bold, italic, underline, strikethrough, link, unlink, list, indent, outdent, and text color. Below the toolbar, the email body text is displayed: 'Hello [First Name],', 'You've just been invited to join the online members-only information center for [organization_name].', 'Visit the registration page at https://[AName]/CreateAccount?email=[Email1]&repID=[Representative ID] and start using your benefits immediately.', and 'Questions? Contact [organization_name] at [organization_phone] or email body'. At the bottom, there's an 'Importance:' section with 'High' and 'Low' radio buttons, a 'File Attachments:' section with an 'Add/Remove Attachments' button, a checkbox for 'Include carbon copy to sender.' (checked), and a 'Task:' dropdown menu. At the very bottom, there are three buttons: 'Send Email Now', 'Send Email Later', and 'Cancel'.

Email Setup

Similar to performing a Mail Merge in Microsoft Word, ChamberMaster maintains the ability to insert a database field within the context of your communication piece, creating personalized, unique communication output

WIKI: [Mail Merge](#)



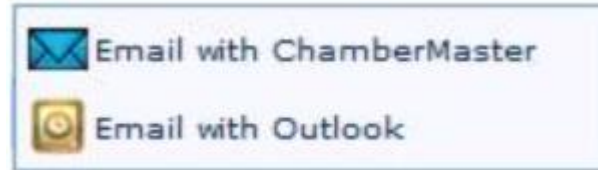
Email Settings

- WIKI: Public Disclaimer
- Archive Email Address
- archive@trainingchamberassoc.chambermaster.com
- archive@trainingchamberassoc.chambermaster.com

Email Sending Options

Once email recipients are selected in ChamberMaster/GrowthZone, there are two methods of sending the email:

- ChamberMaster
- Outlook



Both methods of sending email will record in the Communication History in your database

WIKI: [Email Sending Options](#)

Advantages to Sending Email with ChamberMaster/GrowthZone[[edit](#)]

- 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)

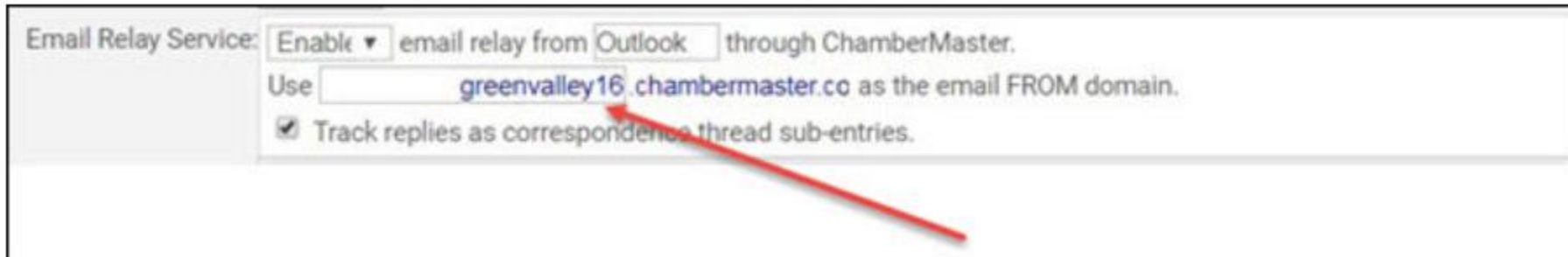
Advantages to Sending Email with Outlook

- Access to additional email addresses not in your database
- May add additional CCs and BCCs
- Familiarity

Email Sending Options

Archive emails (record) in the database even when not logged in

- In Outlook (or whatever email program you use), include your association's unique archive address as a BCC
- The software will receive the email, and look at the address sent/replied to and place it on the communication history of the associated member
- Find your association's domain address under the Email Server Settings section under Setup -> General Options and Settings



Email Relay Service: email relay from through ChamberMaster.
Use as the email FROM domain.
☒ Track replies as correspondence thread sub-entries.

Sending Emails

Sending Emails

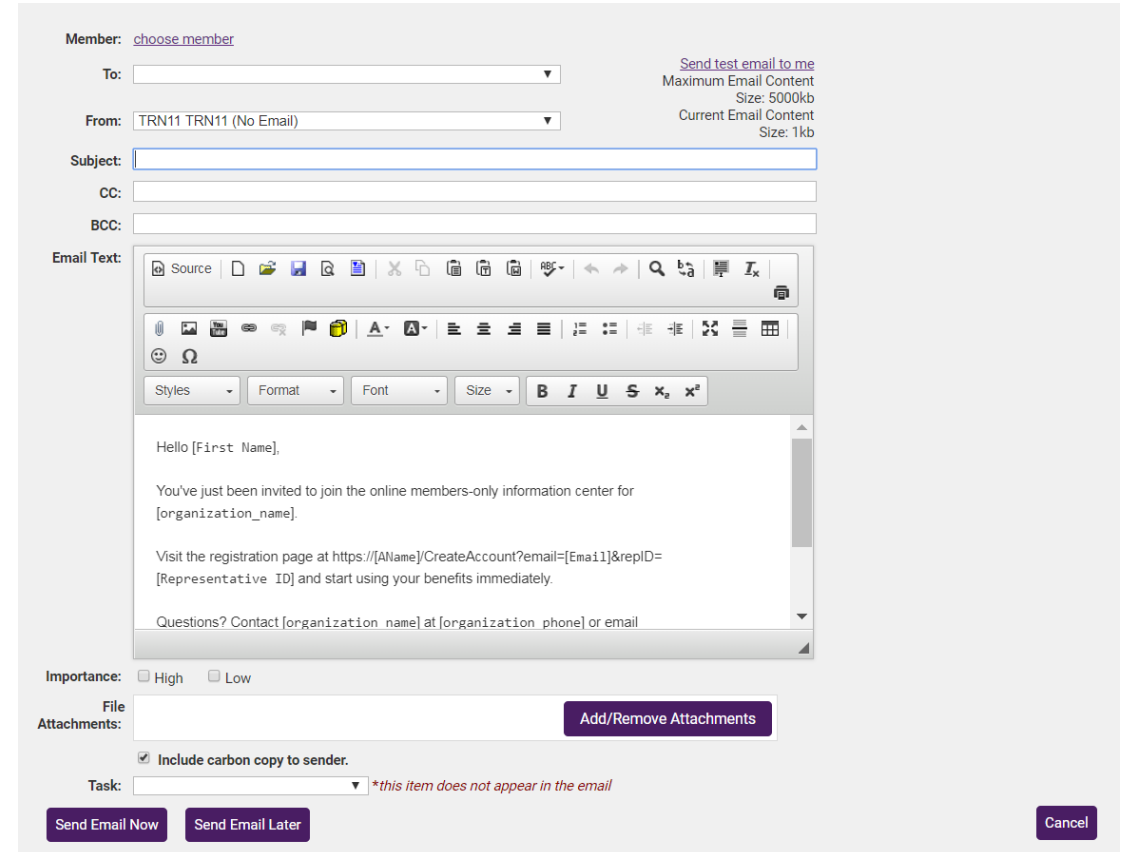
Emails may be sent from many different places in the software:

- Members Module
 - General Tab
 - Reps Tab
 - Communications Tab
 - Email icon on the tool bar
- Communications Module
 - New Email to Multiple Members
 - Email Member
 - Form Letters
- Events Module
 - Sponsor Tab
 - Guest List Tab

Sending Emails

Emails may be sent from many different places in the software - anywhere you find the email editor is found

WIKI: [Quick Guide to Sending an Email](#)



The screenshot displays the GrowthZone email editor interface. At the top, it shows a 'Member' dropdown set to 'choose member'. Below this are fields for 'To:', 'From:' (set to 'TRN11 TRN11 (No Email)'), 'Subject:', 'CC:', and 'BCC:'. A 'Send test email to me' link is present with details: 'Maximum Email Content Size: 5000kb' and 'Current Email Content Size: 1kb'. The 'Email Text' section features a rich text editor with a toolbar containing icons for source, undo, redo, bold, italic, underline, link, unlink, list, indent, outdent, and text color. The text area contains a draft email: 'Hello [First Name],', 'You've just been invited to join the online members-only information center for [organization_name].', 'Visit the registration page at https://[AName]/CreateAccount?email=[Email]&repID=[Representative ID] and start using your benefits immediately.', and 'Questions? Contact [organization_name] at [organization_phone] or email'. Below the editor, there are 'Importance' checkboxes for 'High' and 'Low', an 'Attachments' section with a file input and 'Add/Remove Attachments' button, and a checked checkbox for 'Include carbon copy to sender.'. A 'Task' dropdown is set to a default value, with a note '*this item does not appear in the email'. At the bottom, there are buttons for 'Send Email Now', 'Send Email Later', and 'Cancel'.

Sending Emails

You can easily select criteria to send an email to multiple members

Communications > New Email to Multiple Members

WIKI: [Send A Mass Email](#)

Choose Email Recipient Addresses

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 members by zip/postal code](#)

Add Representatives:

- ▶ [Add representatives by type/status](#)
- ▶ [Add representatives by mem type](#)
- ▶ [Add representatives by group](#)
- ▶ [Add representatives by name](#)
- ▶ [Add representatives by event](#)
- ▶ [Add representatives by zip/postal code](#)

Add Others

- ▶ [Add a new email address](#)
- ▶ [Add non-member email by event](#)
- ▶ [Add all by event](#)
- ▶ [Add sponsors by event](#)

Are you missing any addresses?
Invalid email addresses have been quarantined. [See why](#)
[View the quarantined email addresses](#)

*Contact has no email address (7). [remove](#)

Total Email Addresses: 23
Maximum Email Content Size: 5000kb

Email	Company	Rep Name
mary@aol.com	Brown's Shoes	<input type="checkbox"/>
main@highpointchamber.org	Business High Point	<input type="checkbox"/>
president@eno.edu	Eno State University	<input type="checkbox"/>
flynn@mailinator.com	Flynn's	<input type="checkbox"/>
kjkkgu@gmail.com	FVCOC	<input type="checkbox"/>
<<edit address>>	Harry's	<input type="checkbox"/>
harry@mailinator.com	Harry's Hair	<input type="checkbox"/>
layra@mailinator.com	Laura's Decorating	<input type="checkbox"/>
maysoon@aol.com	Louise's Lollipops	<input type="checkbox"/>
<<edit address>>	R Slash Cattle Co.	<input type="checkbox"/>
<<edit address>>	Rabos Pizza	<input type="checkbox"/>
<<edit address>>	Randy's Shoes	<input type="checkbox"/>
info@leech-lake.com	Roxie's Rascals	<input type="checkbox"/>
<<edit address>>	Sandy's Candy Store	<input type="checkbox"/>
lori@sheboygan.org	Sleeping for Dollars	<input type="checkbox"/>
golf@mailinator.com	The Golf Club	<input type="checkbox"/>
fthomas@mailinator.com	The Pasture Events & Convention Center	<input type="checkbox"/>
cheri.petterson@growthzone.com	The Yankee Shop	<input type="checkbox"/>
<<edit address>>	Tim's House by Ma	<input type="checkbox"/>

[Edit with ChamberMaster](#) [Edit with Outlook](#) [Cancel](#) [Clear List](#)

Logging Communications

Communication history for your members is automatically logged on the Communication tab of the member's record when emails are sent. eReferrals are automatically logged as well

Phones calls can manually be added to the log

And when letters or fax output is printed you can include an entry in the history if you choose

WIKI: [Viewing and Recording Communications History](#)

Logging Communications

Phones calls or Notes can manually be added to a member's communications log

WIKI: [Log a Call or a Note](#)

Log a Call

A Place for Dogs

Date of Call:

Member Rep: [not in list](#)

Chamber Rep:

Task: [edit task options](#)

Subject:

Notes:

Logging Communications

The **eReferral** is designed to accomplish two tasks with a single entry - getting desired member information to a consumer while letting the member know that they've been referred

WIKI: [Refer a Member Using eReferral](#)

eReferral

Potential Customer

Name:

Company:

Phone:

Fax:

eMail:

Contact Preference:

Address:

City:

State:

Zip:

Country:

Refer Potential Customer to:

Selected Referral Recipients (1 total)

	Name	Email
<input type="checkbox"/>	A Place for Dogs	bmckay@mailinator.com

▸ [Remove Selected Recipients](#)

Add Referral Recipients

Members: [by name](#) | [by category](#)

Reps: [add member reps by name](#)

Groups: [add reps by group](#)

▸ [clear recipients list](#)

Working with Groups

Working with Groups

Sending communication via email and letters may be simplified by creating self-defined groups in the **Groups** module

Groups

Home

General

Roster

Fees

Files

Groups

Filter Options

Group Type: - Do Not Filter -

☒ Display active groups only.

[Clear Filters](#)

Listing 34 groups.

Create a Group

Group Name	Group Type	Description	Email	Roster Size	
50+ Council	NAHB/WMS Councils		50-council	25	
Board Members	Committee		board-members	7	<input type="checkbox"/>
Commercial Builders Council	NAHB/WMS Councils		commercial-builders-council	0	
CP - No Login			cp-no-login	72	<input type="checkbox"/>
December Renewals			december-renewals	5	<input type="checkbox"/>
feb			feb	16	<input type="checkbox"/>
Gold Members			gold-members	9	<input type="checkbox"/>
Hot Prospects			hot-prospects	3	<input type="checkbox"/>
Hot Prospects 8_21			hot-prospects-8_21	6	<input type="checkbox"/>
Lodging	Lead List Mailing Groups		lodging	0	<input type="checkbox"/>
march			march	7	<input type="checkbox"/>
Marketplace Mailing List	Marketplace Mailing List	Individuals electing to receive email-updates for new Marketplace items.	marketplace-mailing-list	102	

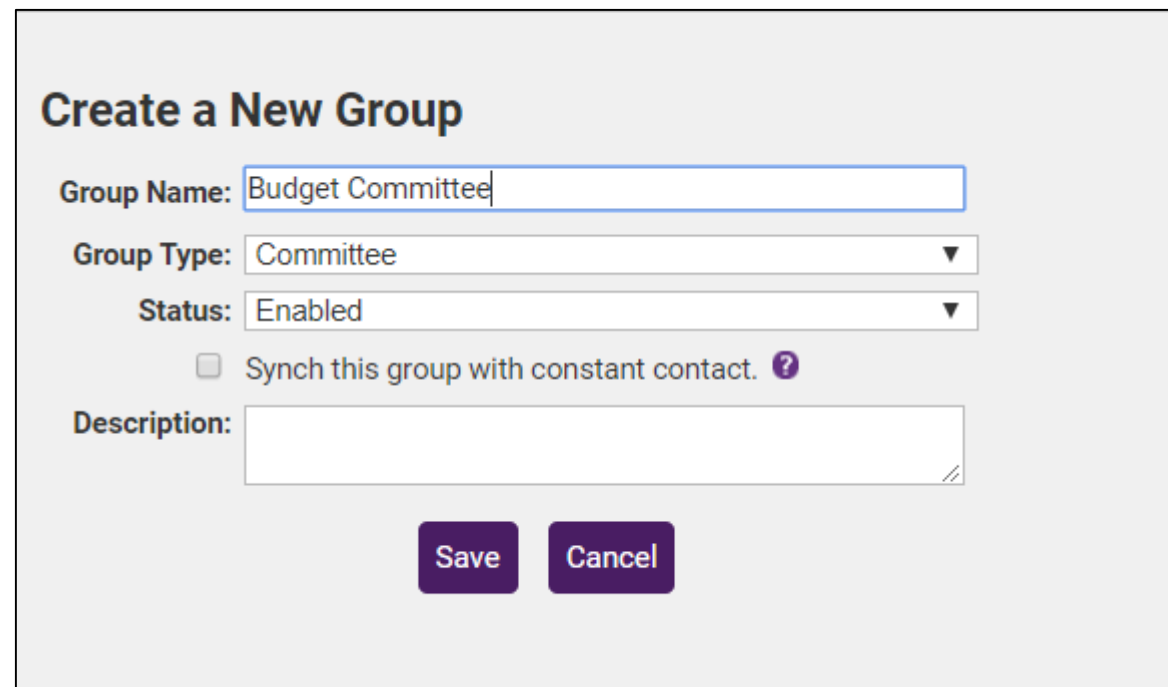
Working with Groups

For Example:

If you frequently send emails to your Budget Committee . . . instead of selecting the 12 members of that committee each time you send an email, you first create a group in the Groups module called the Budget Committee.

Add each of the 12 members to that group. Then when you go to send the email, you simply select the Budget committee as the recipient of the email with one simple click.

WIKI: [Create a Group](#)



The screenshot shows a web form titled "Create a New Group". It contains the following fields and controls:

- Group Name:** A text input field containing "Budget Committee".
- Group Type:** A dropdown menu with "Committee" selected.
- Status:** A dropdown menu with "Enabled" selected.
- ☐ **Synch this group with constant contact.** A checkbox with a purple question mark icon to its right.
- Description:** A large text area for additional information.
- Buttons:** Two purple buttons labeled "Save" and "Cancel" at the bottom right.

Questions?