ChamberMaster/MemberZone
Working with Communications & Groups

GrowthZone
smarter association software

Agenda

- Email Setup
  - Signatures
  - Email Templates
  - Email Settings
- Sending Emails
  - Individual Emails
  - Mass Emails
- Logging Communications
  - Notes
  - Reminder
  - E-referrals
- Working with Groups

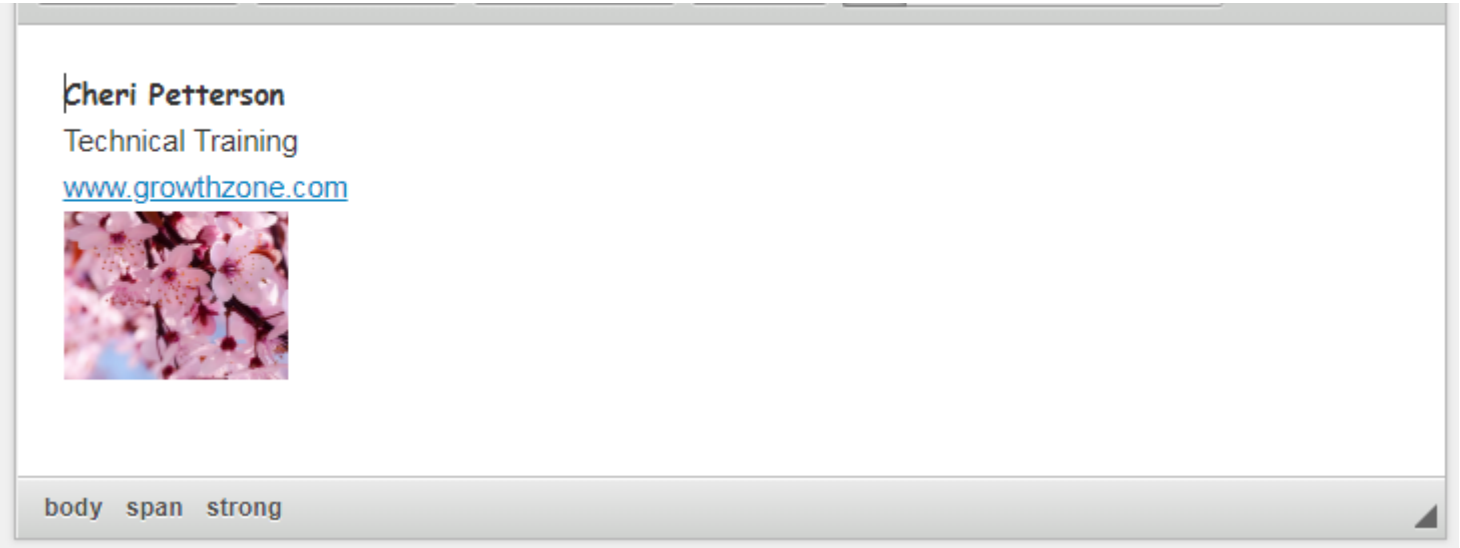
Email Setup

Email Setup

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

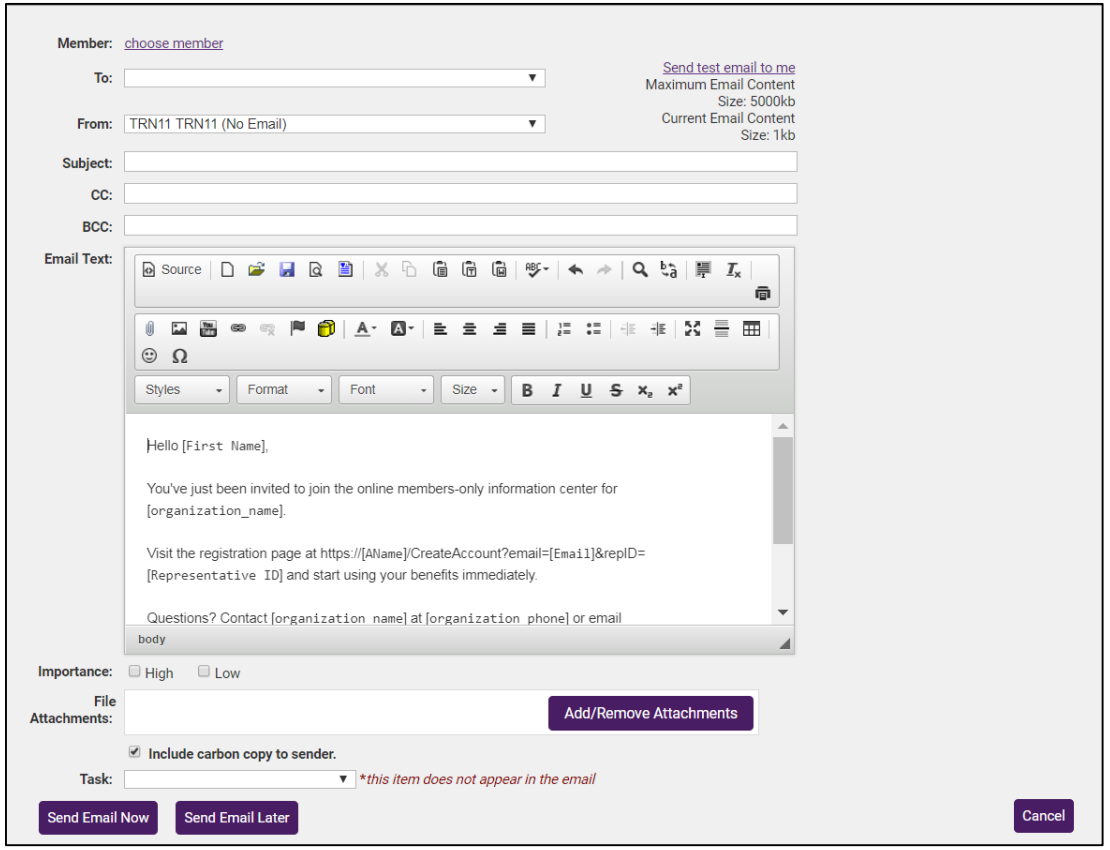
Design your signature block with any included text and graphics. You may also include items that would belong in the header such as your logo

WIKI: Creating a Signature Block



Email Setup

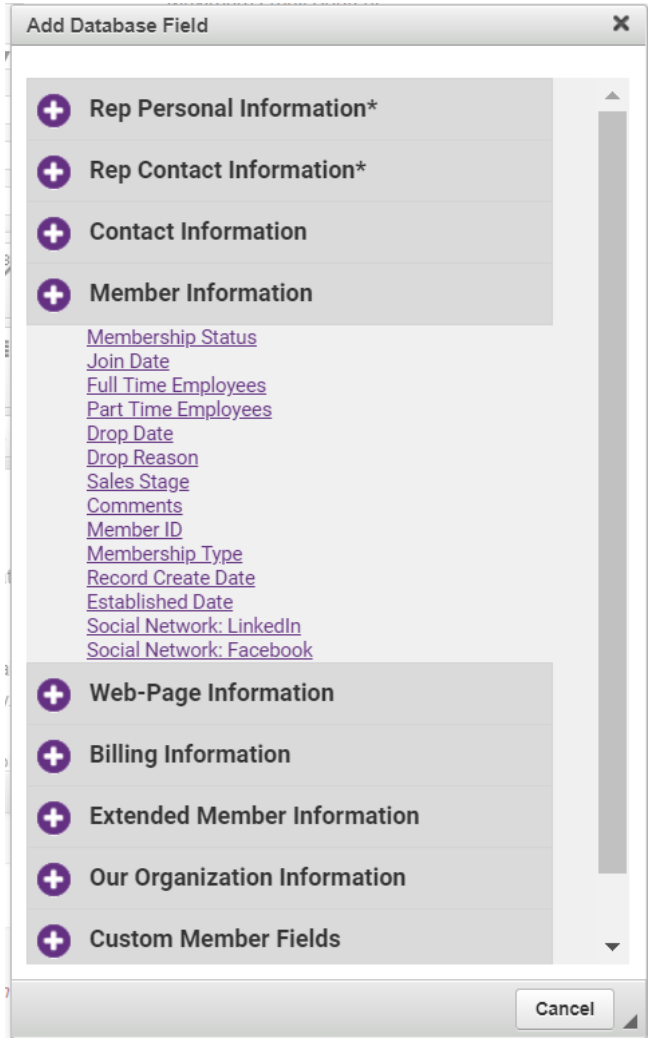
- Working with Email Templates - a number of predefined templates are provided that may be selected and brought onto your own list of templates
- You may use these templates “as is” or choose to modify and then re-save with your own name
- WIKI: Working with Templates/Documents



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 Setup

Email Settings

- WIKI: Public Disclaimer
- Archive Email Address

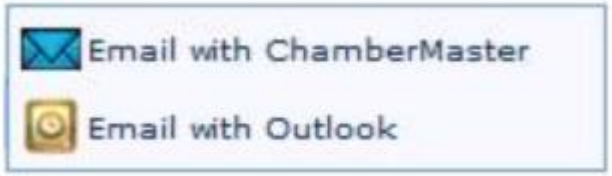
- archive@trainingchamberassoc.chambermaster.com

- 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

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)

Email Sending Options

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

Sending Emails

Sending Emails

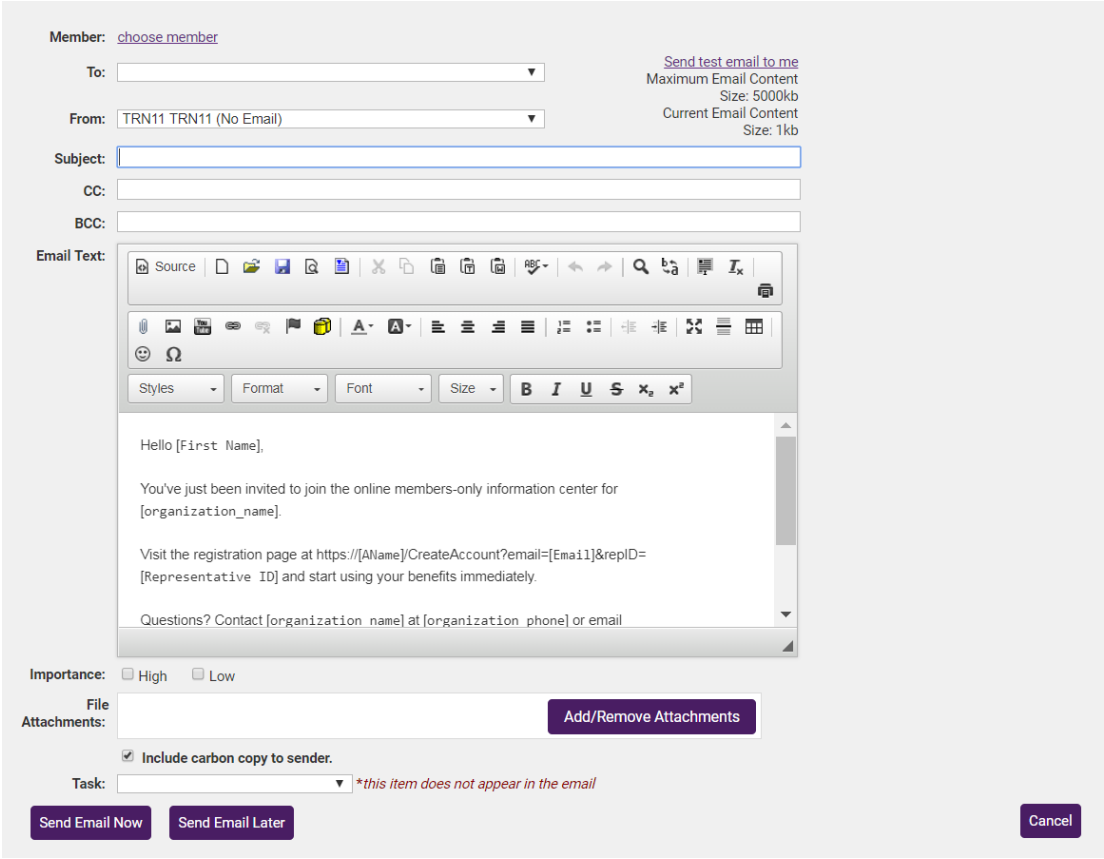
Emails may be sent from many different places in the software:

- 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

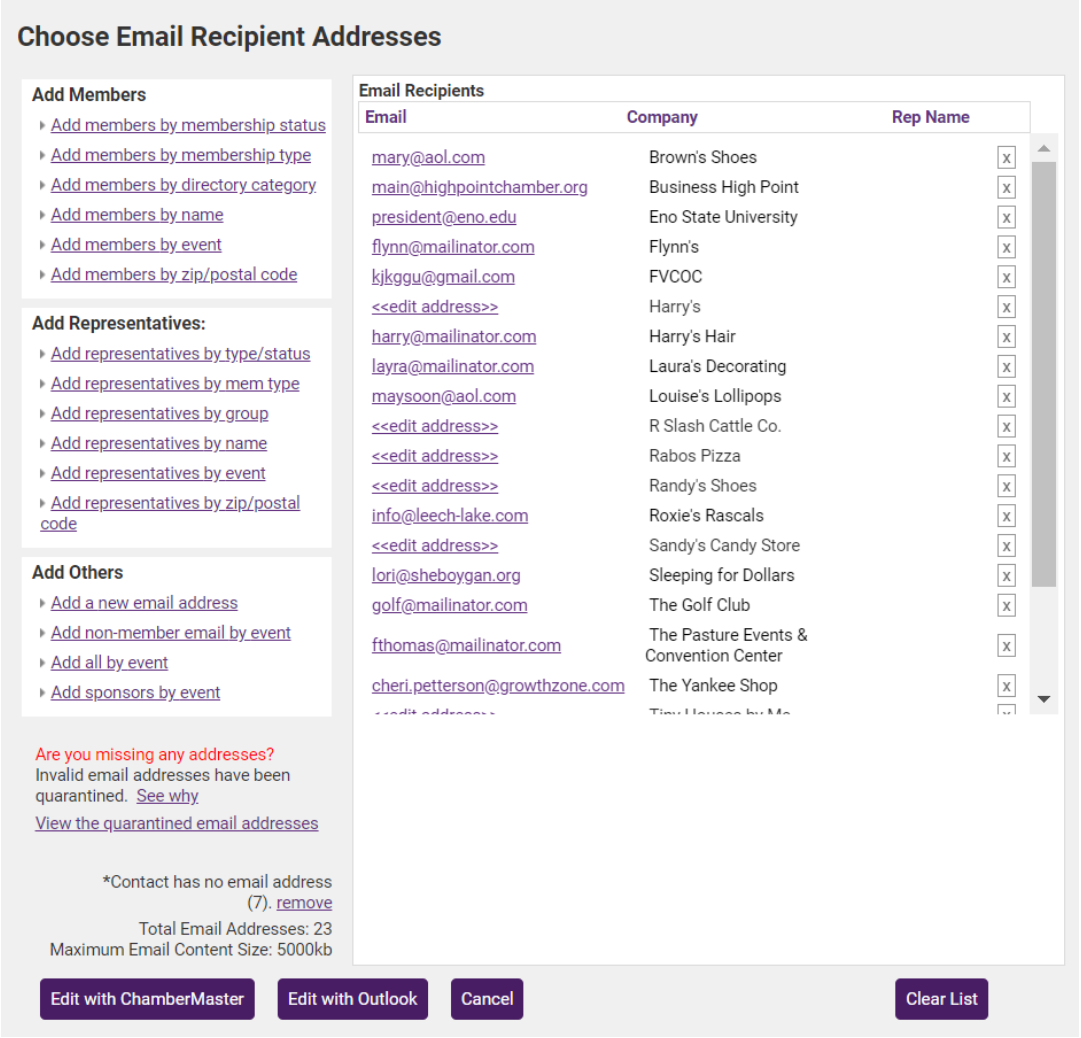


Sending Emails

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

Communications > New Email to Multiple Members

WIKI: Send A Mass Email



Logging Communications

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

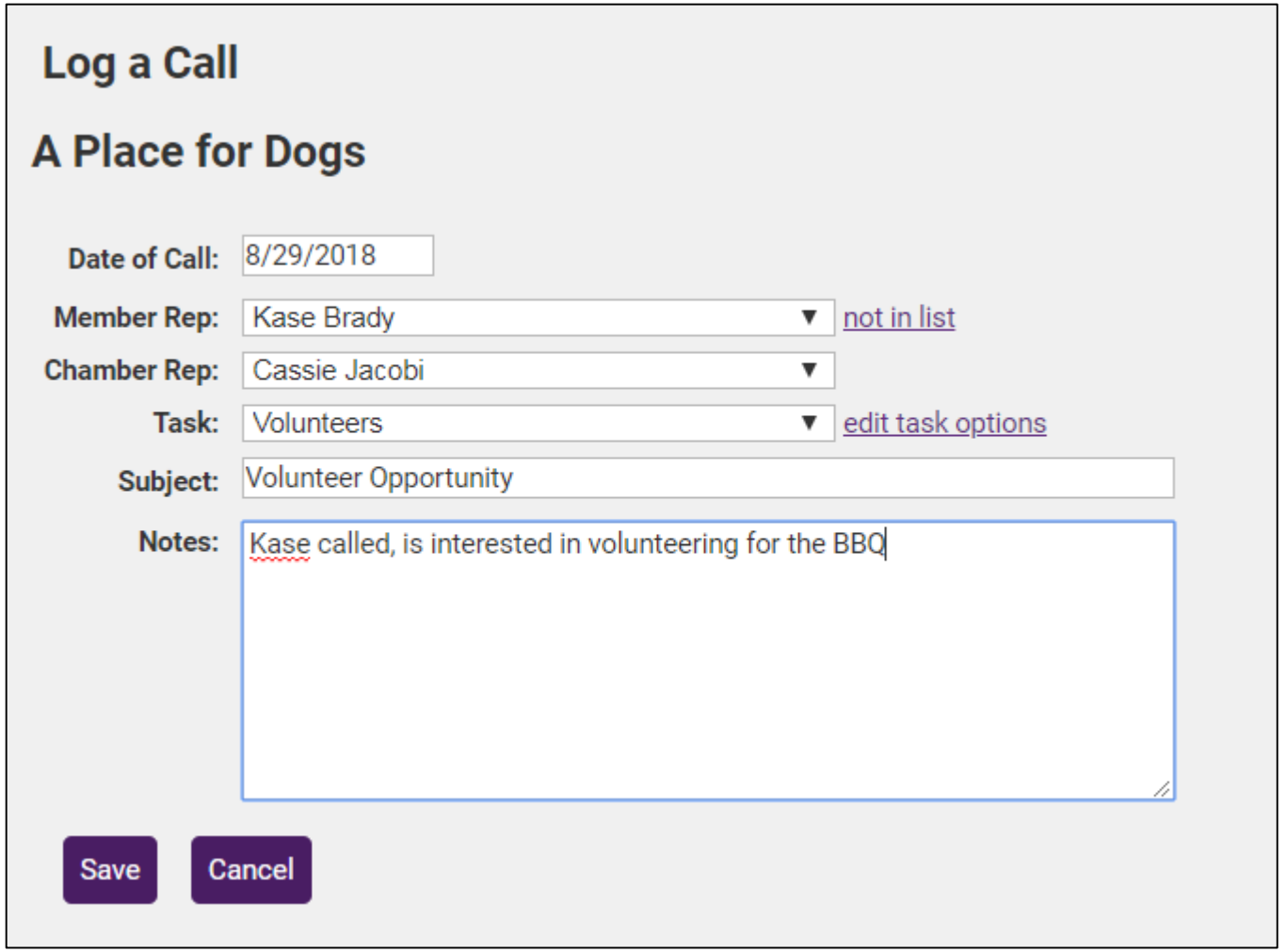
And when letters or fax output is printed you can include an entry in the history if you choose

WIKI: Viewing and Recording Communications History

Logging Communications

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

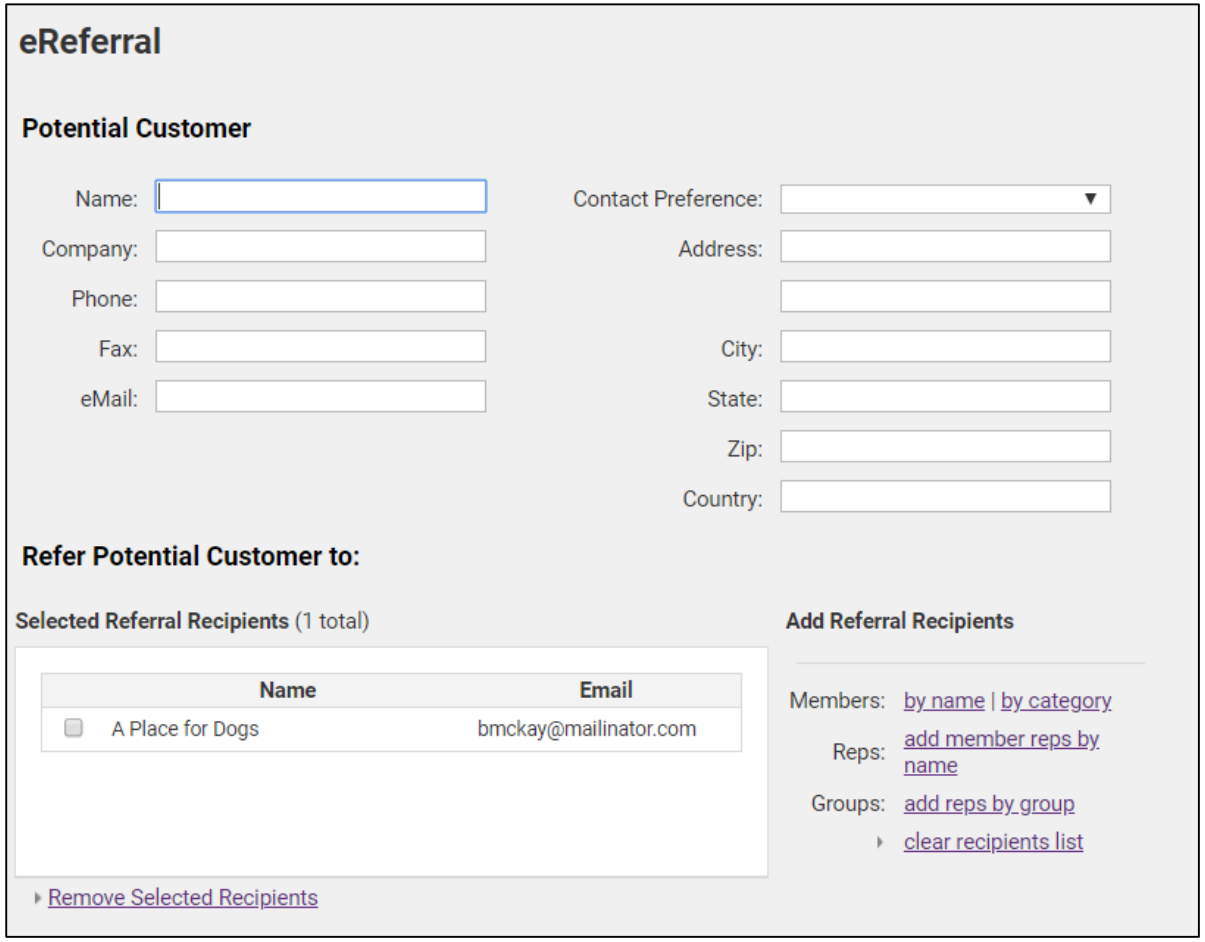
WIKI: Log a Call or a Note



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

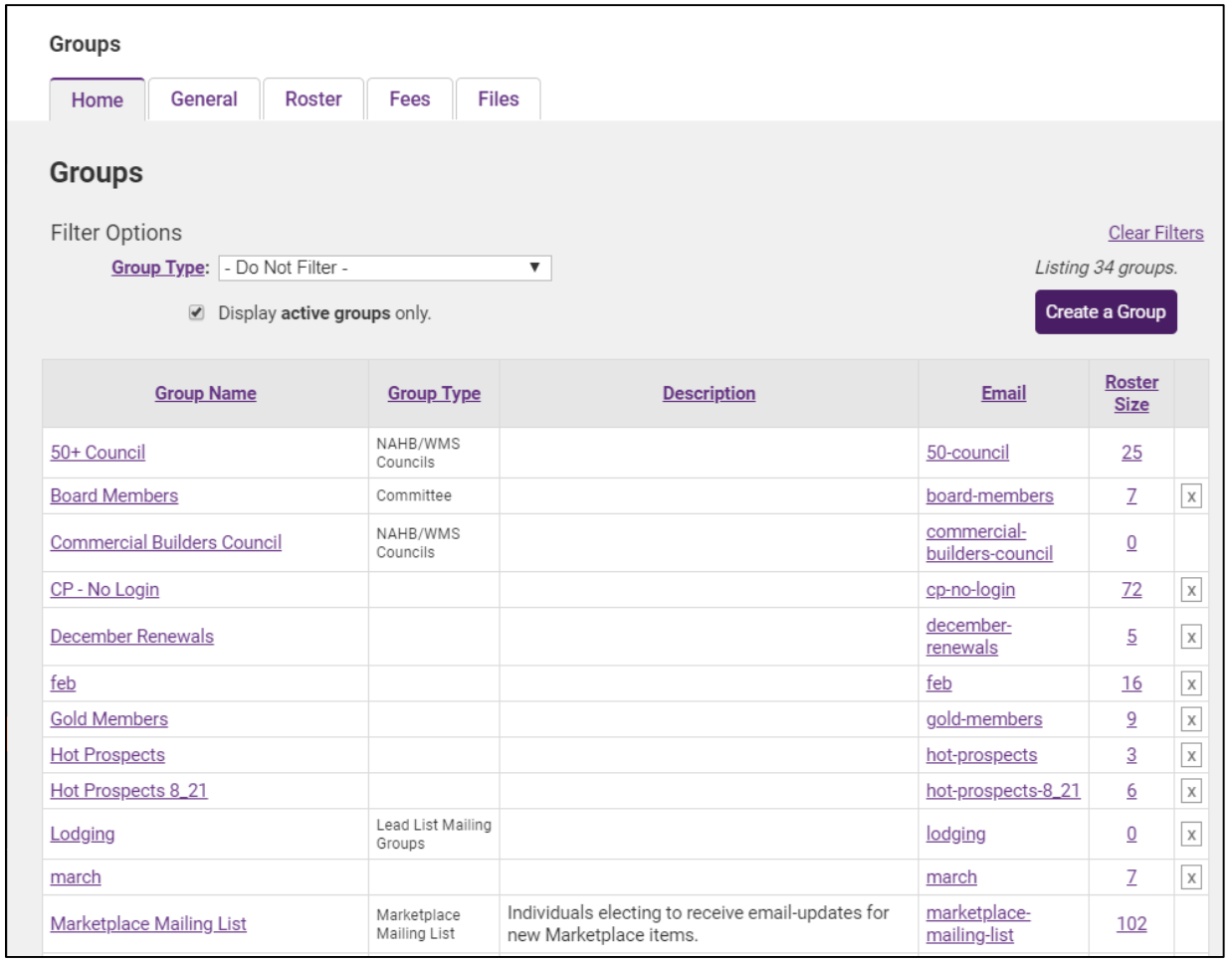
WIKI: Refer a Member Using eReferral



Working with Groups

Working with Groups

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

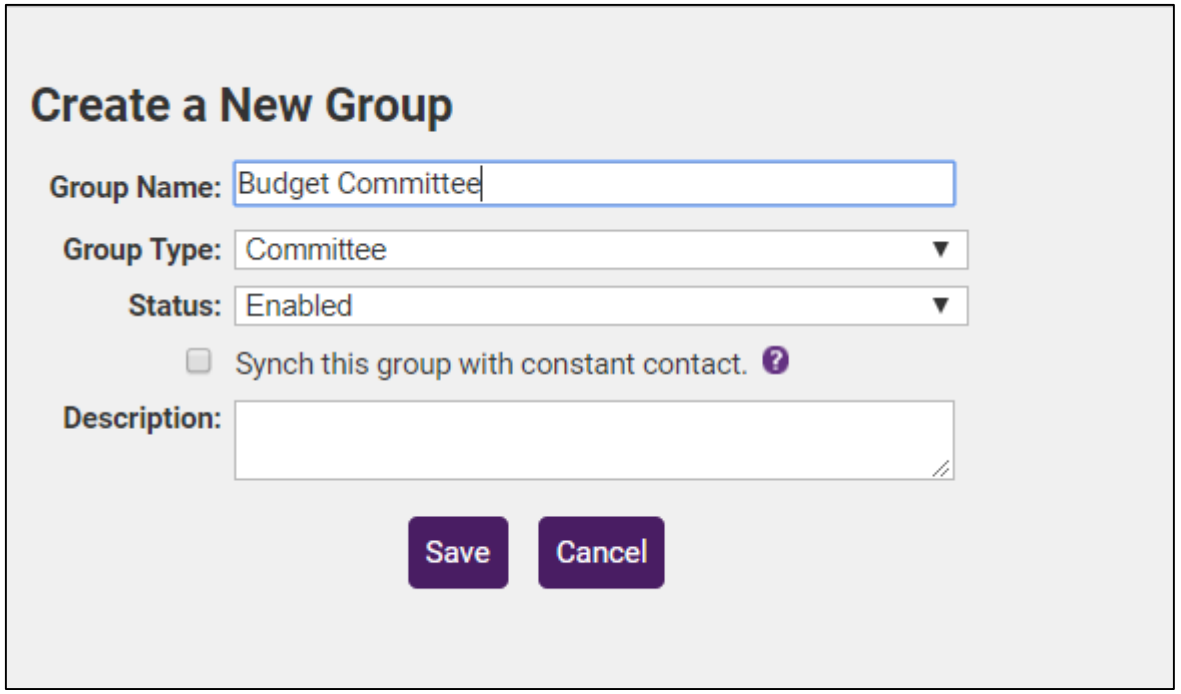


Working with Groups

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

Questions?