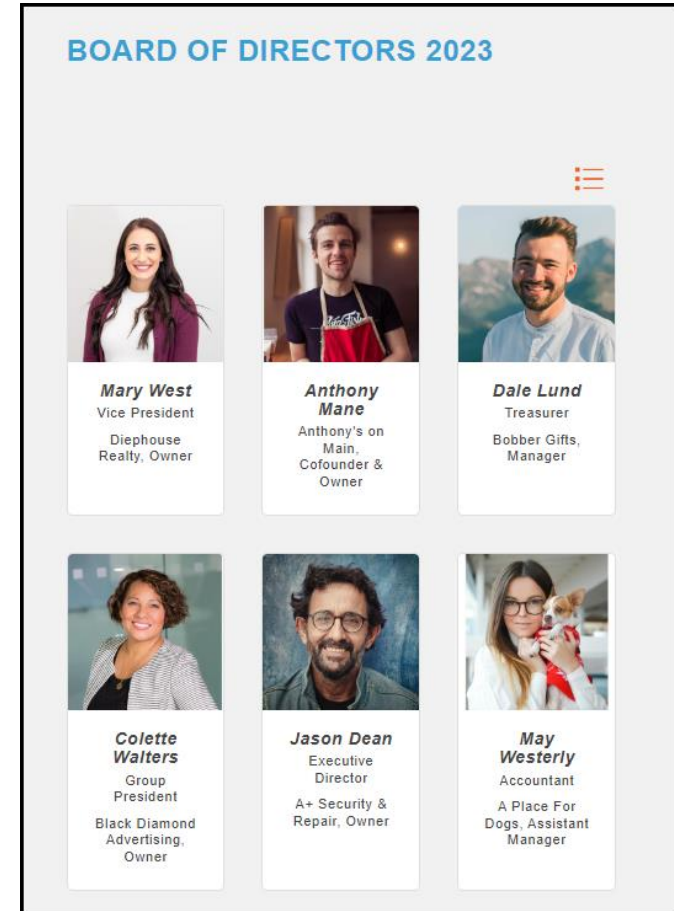


Creating, Managing, and Optimizing Groups in CM/MZ

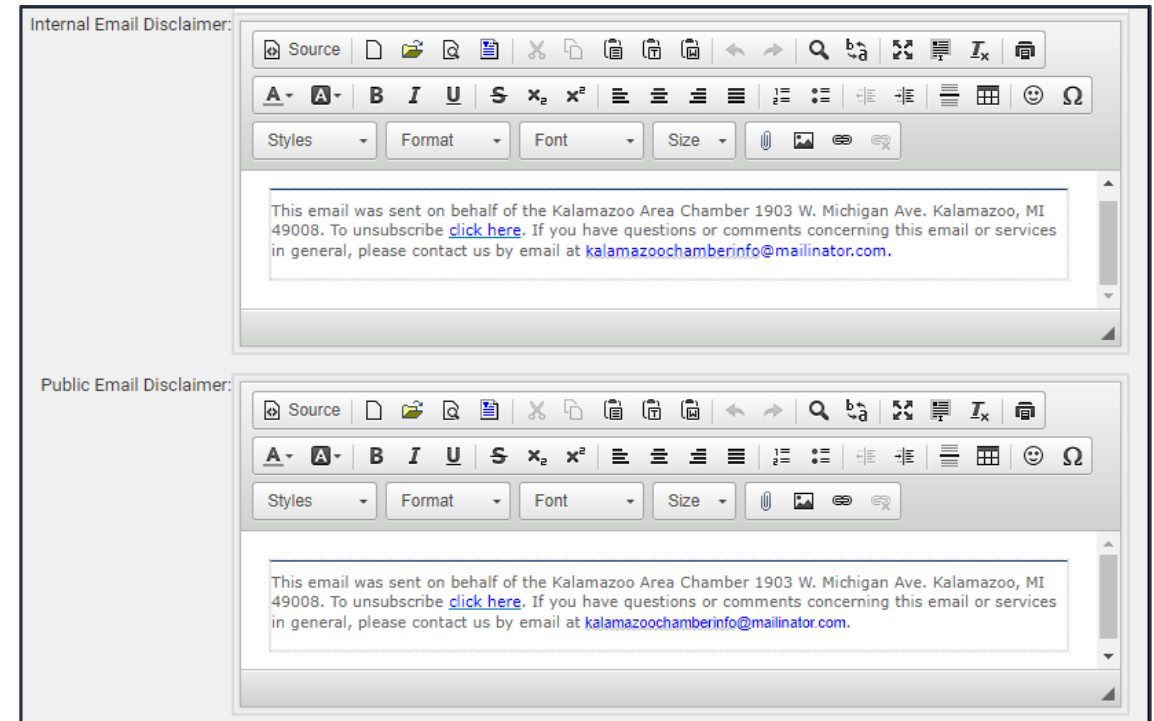
Agenda

- 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
 - Email List
 - Event Planning Committee
- KB: Group Types

Groups

Filter Options

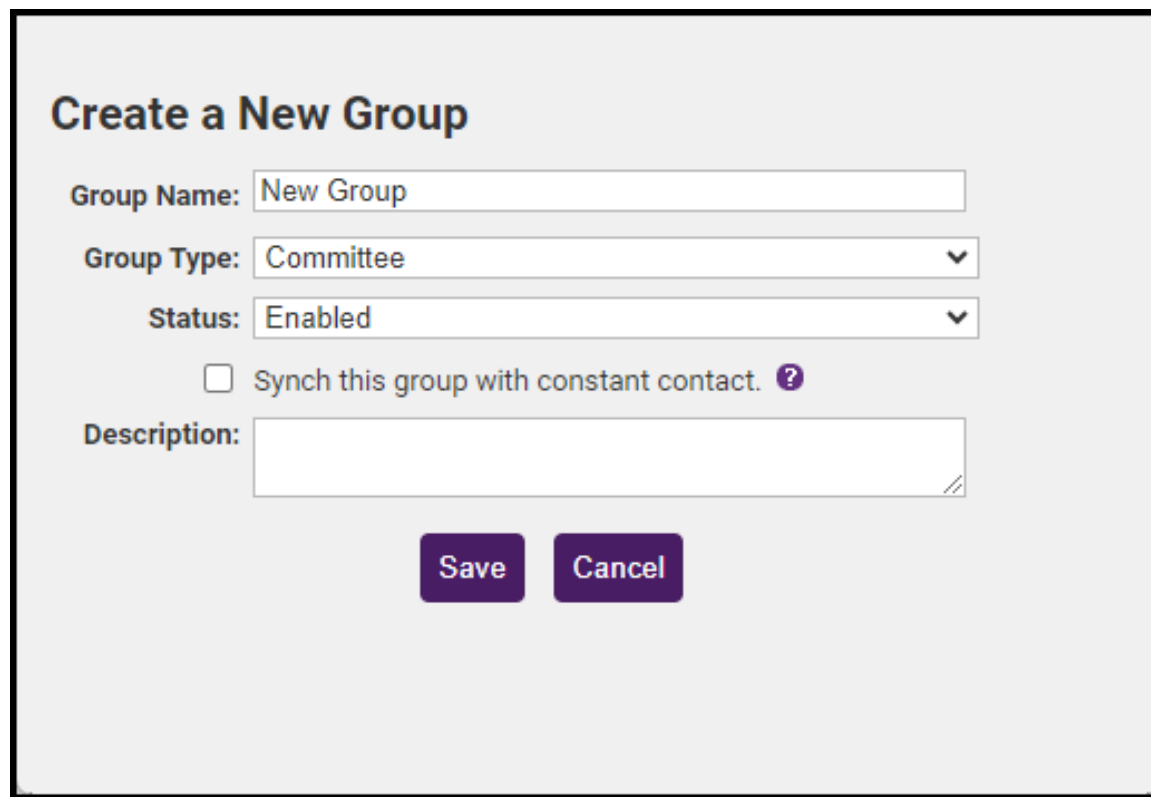
Group Type:

- ☒ - Do Not Filter -
- ☐ Committee
- ☐ Event Planning Group
- ☐ Lead List Mailing Groups
- ☐ Mailing Lists
- ☐ Marketplace Mailing List
- ☐ Newsletter List
- ☐ Programs
- ☐ Volunteers

<u>Group Name</u>	<u>Group Type</u>	<u>Description</u>
2022-2023 Ambassador		Senior members mentor new mem 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



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

- Group Name:** A text input field containing "New Group".
- 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 entering a description.
- Buttons:** Two purple buttons labeled "Save" and "Cancel" are positioned at the bottom right of the form.

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](#)

Groups

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Group Roster: Fall Festival Planning Committee 2023

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: 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

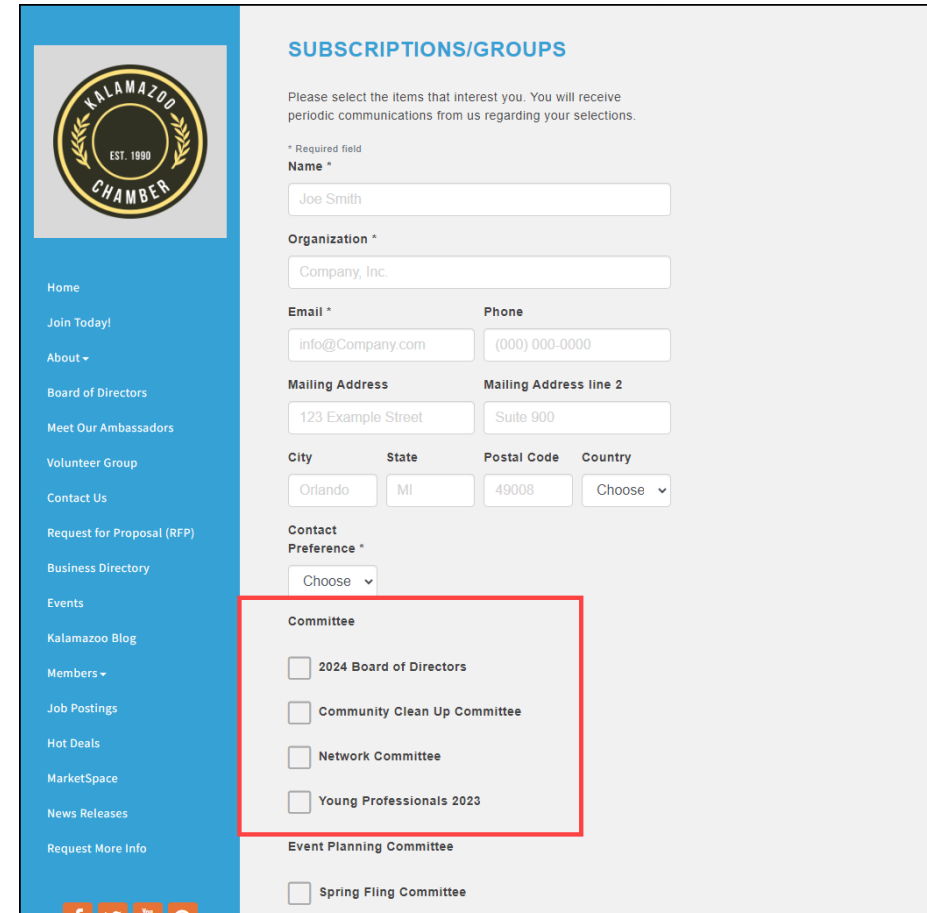
Allow Members to Join Group via MIC

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

The screenshot displays the 'Account Settings' interface. On the left, a sidebar lists various settings: Personal, Profile, Username / Password, Photo, **Groups/Interests** (highlighted with a red box), Social Networks, Display Preferences, Additional Information, Company, and Billing. The main area is titled 'Groups/Interests' and contains two sections: 'My Groups/Interests' and 'Groups'. The 'Groups' section includes a 'Select All' checkbox and a 'Newsletter List' section with checkboxes for 'Capital Campaign Committee' and 'Newsletter - General Mailing List - A monthly newsletter of chamber happenings'. The 'Interests' section includes a 'Select All' checkbox, a 'Committee' section with a checkbox for 'Network Committee', a 'Lead List Mailing Groups' section with a checkbox for 'LEAD LIST - connect to Restaurants Info Request', and a 'Mailing Lists' section with a checkbox for 'Young Professionals 2022'. At the bottom of the main 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



SUBSCRIPTIONS/GROUPS

Please select the items that interest you. You will receive periodic communications from us regarding your selections.

* Required field

Name *

Joe Smith

Organization *

Company, Inc.

Email *

info@Company.com

Phone

(000) 000-0000

Mailing Address

123 Example Street

Mailing Address line 2

Suite 900

City

Orlando

State

MI

Postal Code

49008

Country

Choose

Contact Preference *

Choose

Committee

☐ 2024 Board of Directors

☐ Community Clean Up Committee

☐ Network Committee

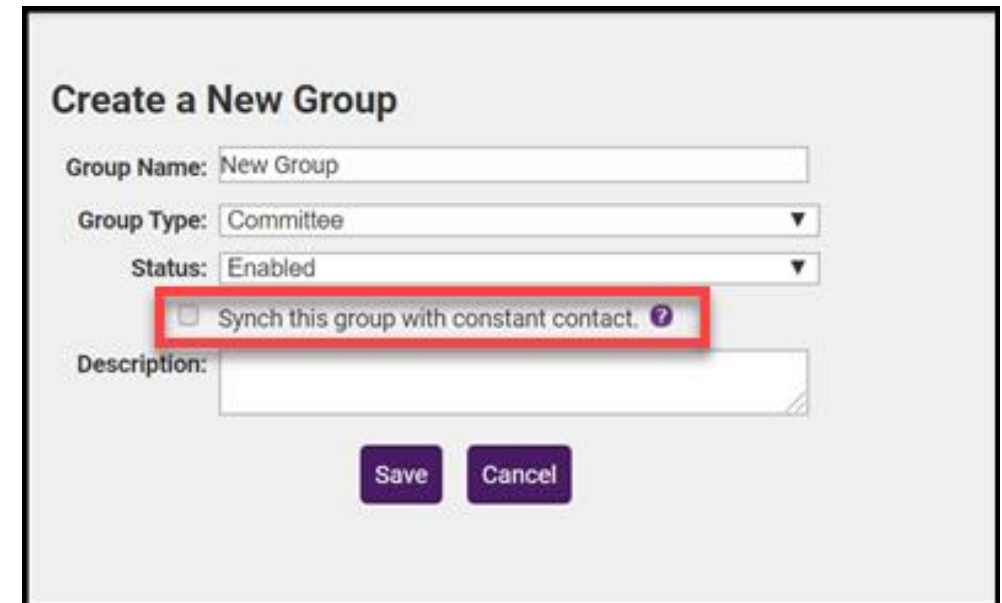
☐ Young Professionals 2023

Event Planning Committee

☐ Spring Fling Committee

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](#)



The screenshot shows a web form titled "Create a New Group". It contains several input fields and dropdown menus: "Group Name" (text input with "New Group"), "Group Type" (dropdown menu with "Committee"), and "Status" (dropdown menu with "Enabled"). Below these is a checkbox labeled "Sync this group with constant contact." with a question mark icon to its right. This checkbox is highlighted with a red rectangular border. Below the checkbox is a "Description" text area. At the bottom right of the form are two buttons: "Save" and "Cancel".

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:

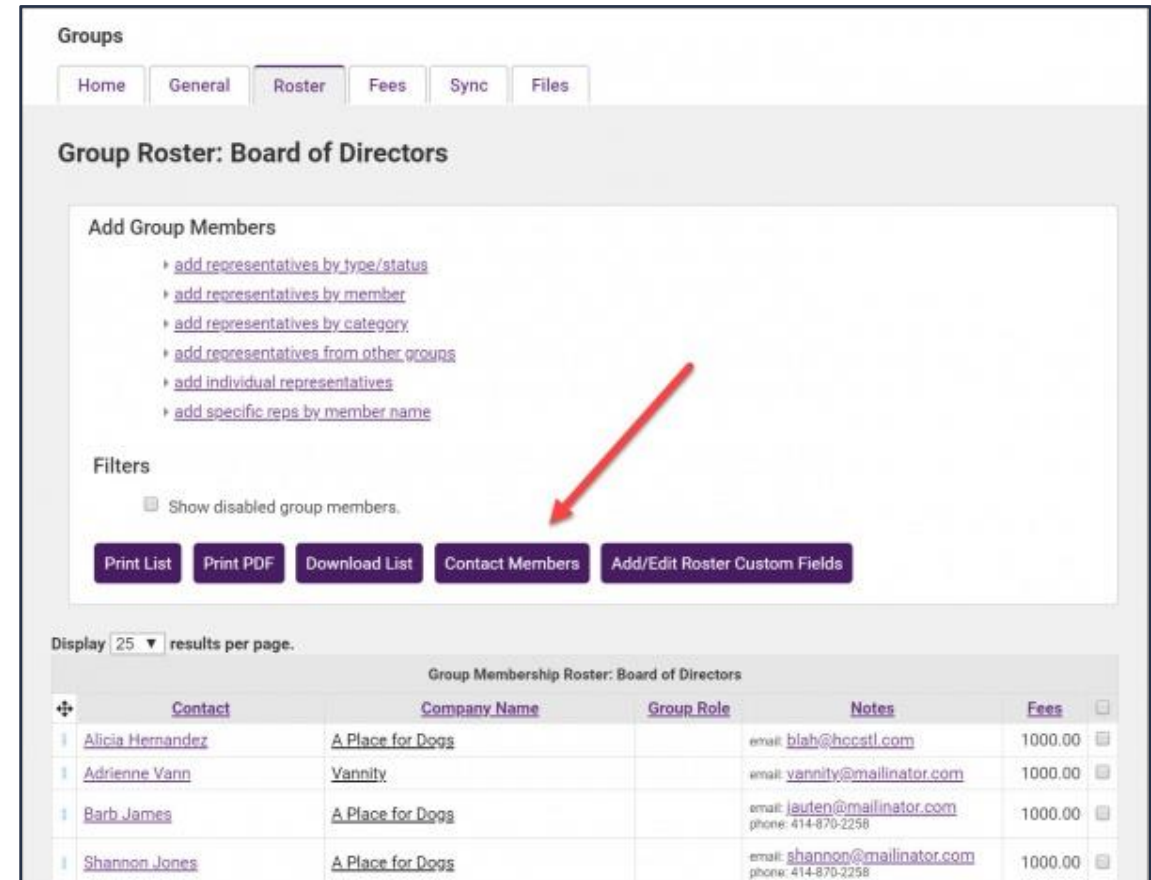
Visible to Public: ☐ Required: ☐ Limited Quantity: ☐ [?](#)

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

[Continue](#) [Cancel](#)

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



The screenshot displays the 'Groups' section of the Chambermaster Memberzone interface. The 'Roster' tab is selected, showing the 'Group Roster: Board of Directors'. Below the tabs, there is a section for 'Add Group Members' with several links: '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'. A 'Filters' section includes a checkbox for 'Show disabled group members'. Below these are buttons for 'Print List', 'Print PDF', 'Download List', 'Contact Members', and 'Add/Edit Roster Custom Fields'. A red arrow points to the 'Contact Members' button. At the bottom, there is a table titled 'Group Membership Roster: Board of Directors' with columns for 'Contact', 'Company Name', 'Group Role', 'Notes', 'Fees', and a checkbox. The table lists four members: Alicia Hernandez, Adrienne Vann, Barb James, and Shannon Jones, all with a fee of 1000.00.

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

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

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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

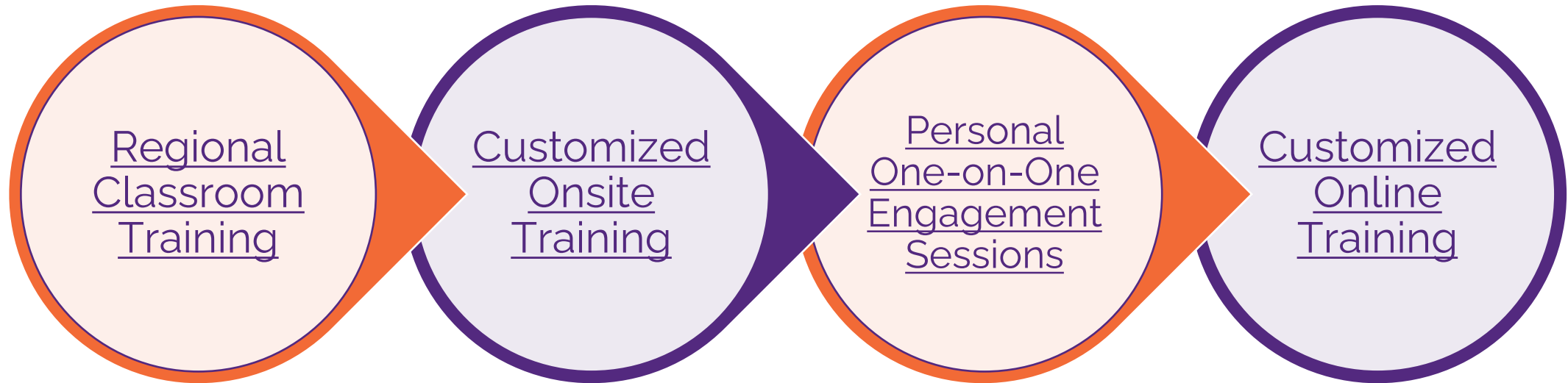
Contact	Company Name	Group Role	Notes
Dorothy Beyer	Beyer's Ace Hardware		email: dorothy@mailinator.com phone: (123) 456-7899
Audra Winters	Get Pretty		email: audra@mailinator.com phone: (505) 801-2067
Greg Lansonne			
Cheri Petterson			email: cheri.petterson@growthzone.com

[Save Roster Order](#) [Disable Selected Contacts](#) [Remove Selected Contacts](#)

Training Resources



Expanded Training Offerings



Questions?