



Communication

This session includes

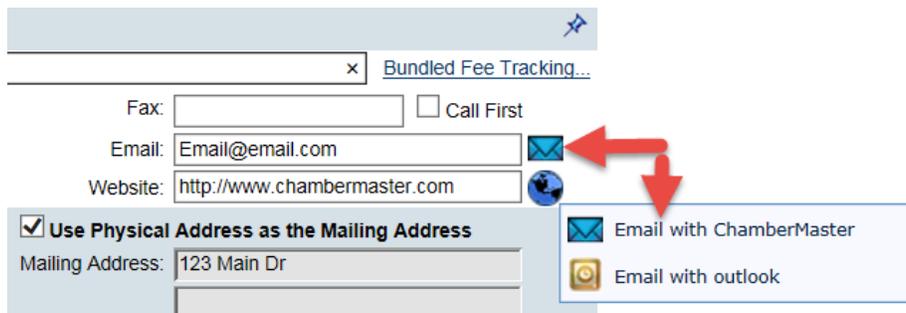
1. How to send out an email from the database: 32
2. Explain the Communication Tab 3:10
3. [How to send a mass email](#). 7:43
4. [Print letters from the database](#) 14:40
5. [Print mailing labels](#) 18:29
6. [Differences between email with the Database or Outlook.](#)
7. [Create a signature](#) 21:32
8. [Save a template](#) 23:24
9. [How to set up and use archive email](#) 25:09
10. [Information about SmartText](#) 29:08

Options for sending an individual email out of the database.

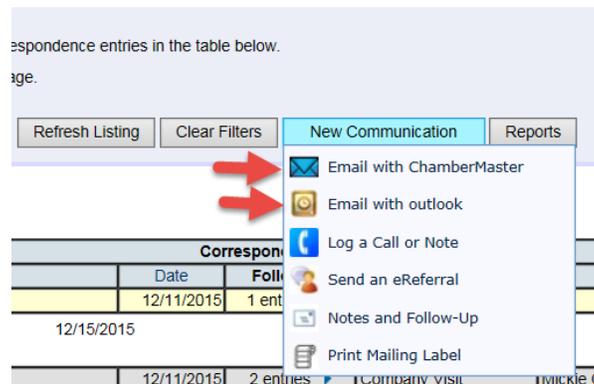
1. Click on the blue envelope in the upper right hand corner.



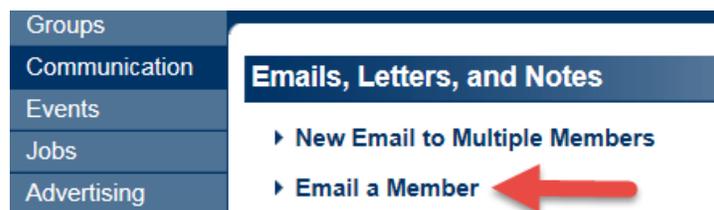
2. Members > General tab > mouse over any email address for the sending options



3. Members > Communication tab > New Communication



4. Communication > Email a Member



Send an email to multiple reps

1. On the **Reps** tab, click to select the check mark in front of the desired reps to be emailed in the **List of Representatives** area.
2. Once you have the reps selected > click **Send Email**.

List of Representatives

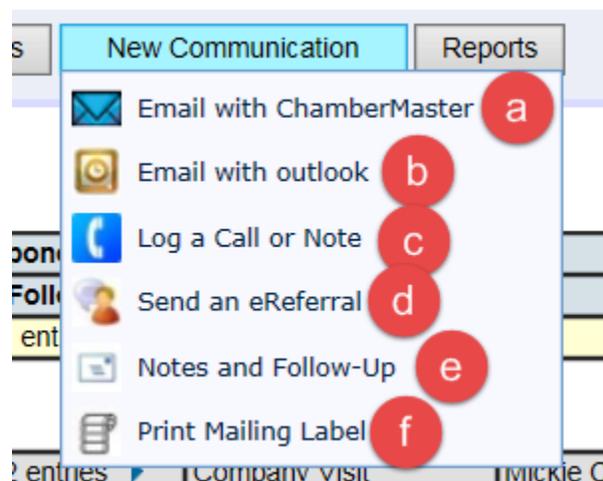
entries 1 - 7 of 7 Display 100 results per p

check all clear all	Rep Name	Title
<input checked="" type="checkbox"/>	Holly Anderson	
<input checked="" type="checkbox"/>	lily bean	
<input type="checkbox"/>	Mickie Cat [Login]	Owner
<input type="checkbox"/>	Mike Hanson	
<input checked="" type="checkbox"/>	Lily Larson	
<input type="checkbox"/>	Kody Toms	
<input type="checkbox"/>	Lily Toms	

▶ **Send Email** **Print Labels** ▶ **Reassign S**

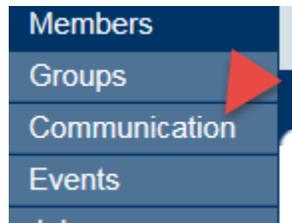
Features of the Communication Tab

1. **Tasks/Categories** - Select a task item that indicates the nature of this communication. If the desired task item is not listed, create your own under Setup->Correspondence Categories. These task items are then available as a Task item across all member records. The ability to add new task items is only available to staff with Administrator level permissions.
2. **New Communication button** – The new communication buttons allows you to do multiple task on the communication tab.
 - a. **Email with ChamberMaster** – This option will open up the email editor to send from the database.
 - b. **Email with Outlook** – This option will open an Outlook Message with the name from the database.
 - c. **Log a call or Note** - Log a Call or Note may be used for logging phone calls, face-to-face communication, notes written, miscellaneous communication sent, and any other note. Calls may be viewed on the Members->Communication tab and also in the Communication module where all members' history may be searched, filtered, and viewed together Log a call or note
 - d. **Send an eReferral** - 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.
 - e. **Notes and Follow-Up** – Allows you to create a note and set up a different time to follow up with them.
 - f. **Print a mailing label** – This option allows you to create a mailing label for this specific member record.

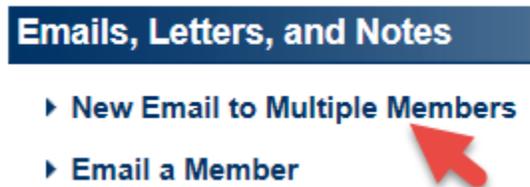


How to send a mass email

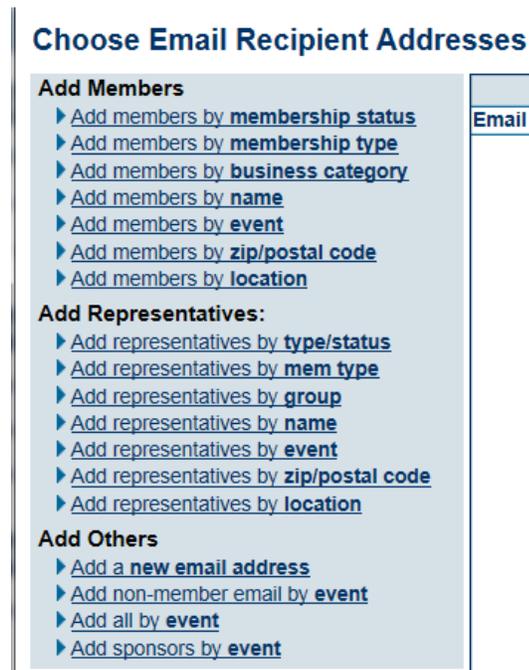
1. Click on **Communication** in the left-hand menu.



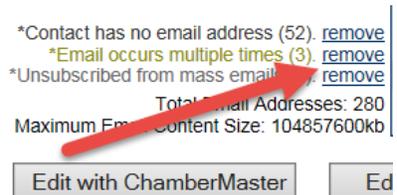
2. Click on **New Email to Multiple Members**



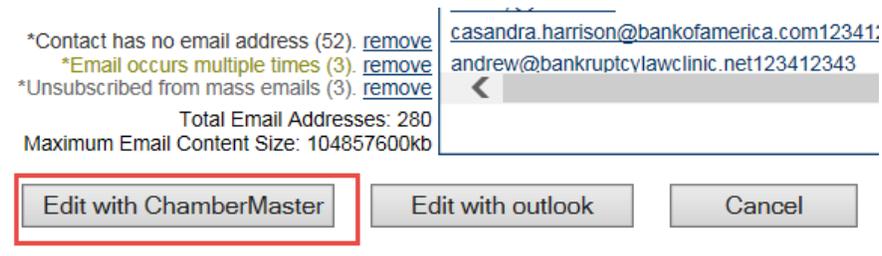
3. Select desired recipients.



4. Click **Remove** next to those identified as having no contact info, duplicate emails, or invalid emails

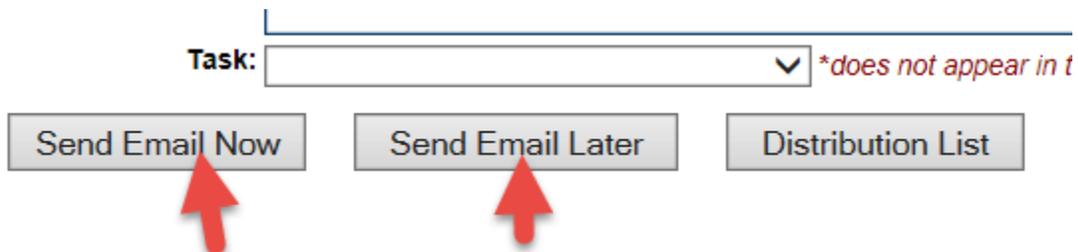


5. Click **Edit with Chambermaster***



6. Compose the email message or use [templates](#)

7. Click **Send Email Now** or **Send Email Later****



**If desiring to send this email using your own email program, click Edit with Outlook. Check out the reasons for sending from ChamberMaster vs. your own program.*

***Available only for those with ChamberMaster Plus*

Print letters from the database

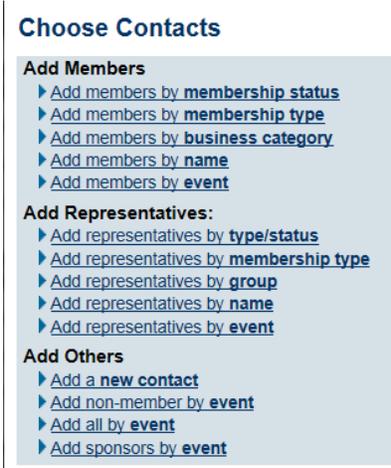
1. Click **Communication** in the left-hand menu.



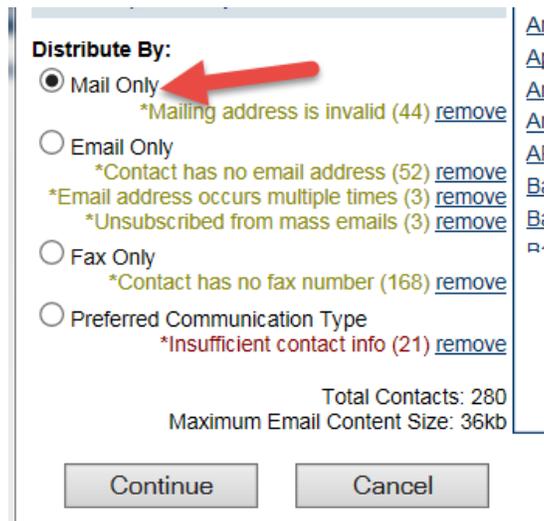
2. Click **Form Letters**



3. Add desired recipients

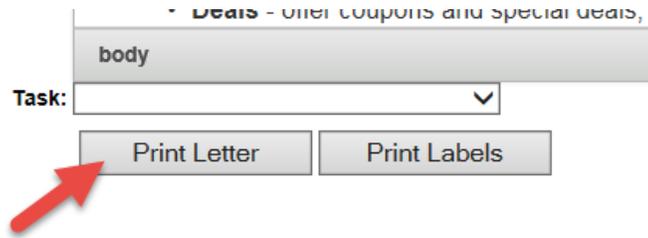


4. Click the **Mail Only** option in Distribute By, then click **Continue**



5. Compose email message or use saved templates

6. Click **Print Letters**



7. Complete the Print Options fields, Click Continue

Print Options

Include **Chamber Address Header** on the letter.

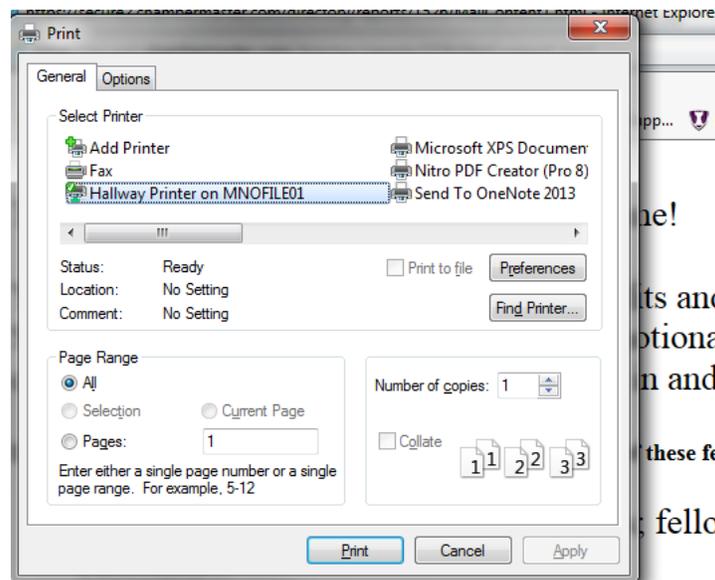
Print a **single unaddressed copy** of the letter.

Print **individually addressed copies** of the letter.

Include **Recipient Address** on the letter (for use with windowed envelopes).

Save letter to communication log as:

8. Once the letter opens you can print from your browser.



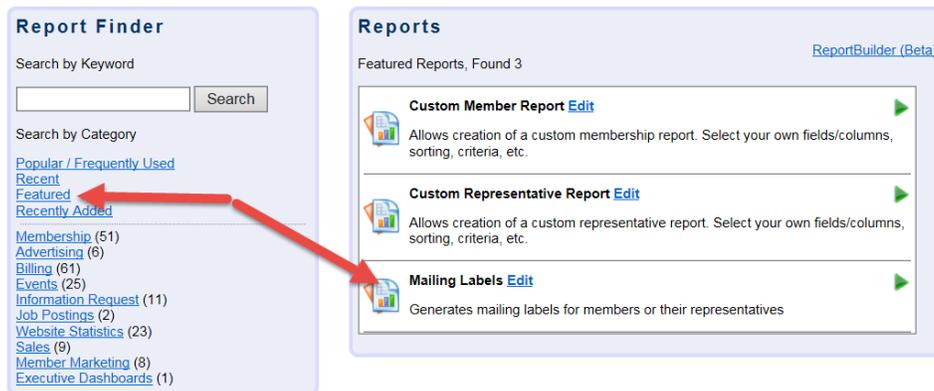
- **Job postings** - submit your own job openings
- **Advertise events** - add your events to our onl

Print Mailing Labels

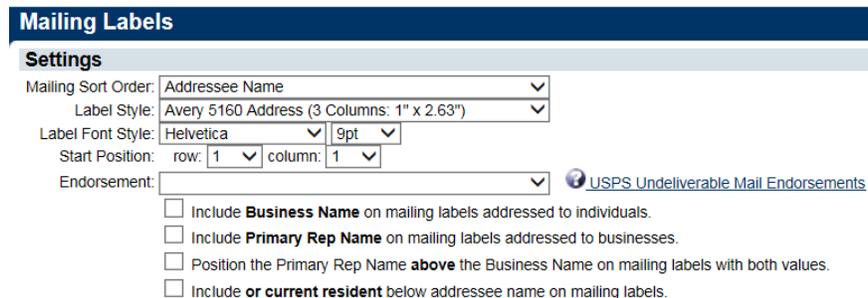
1. Click Reports on the left-hand menu



2. in Featured click on Mailing Labels



3. Set the appropriate filters



4. Populate mailing label list

- Members:** [add members by status](#)
[add members by membership type](#)
[add members by name](#)
[add members by category](#)
- Reps:** [add representatives by type/status](#)
[add representatives by membership class](#)
[add member representatives by name](#)
- Groups:** [add groups](#)

5. Click View/Print Labels



Difference between Emailing with the database and Outlook.

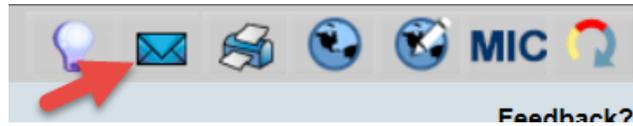
1. Advantage to sending with ChamberMaster/MemberZone
 - Easy access if already logged in.
 - Give access to current addresses in your database
 - Ability to Create “mail merge” emails
 - Ability to embed attachments as links
 - Ability to use templates
 - Ability to schedule the email for future delivery (for users of the Plus edition or greater)
2. Advantages to sending email with Outlook
 - Access to additional email addresses not in your database
 - May add additional CCs and BCCs
 - Familiarity

Both methods of sending email will record in the Communication History.

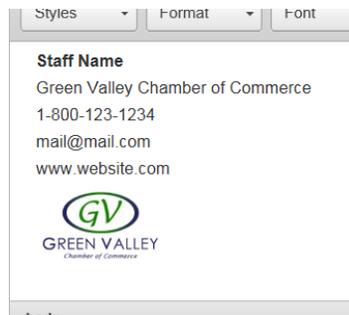
Note: This selection will open whatever the email program is set as the default for your web browser. Whatever email program opens when you click on a “mailto” link is the email program that will be used when you click Email with Outlook.

Create signature block.

1. Click the blue envelope in the upper right-hand corner



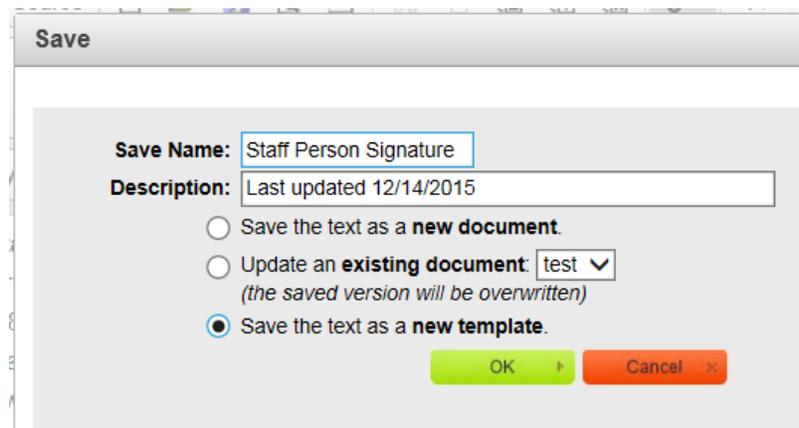
2. In the editor create the desired signature block. *



3. Click the Save icon



4. In the Save menu enter the template name and description



* If you create your signature using the option Our Organization Information in the database fields it will update whenever you update the organization information in Setup.

Save a template

1. Open the editor and create the desired communication piece or open an existing document and make any desired changes.

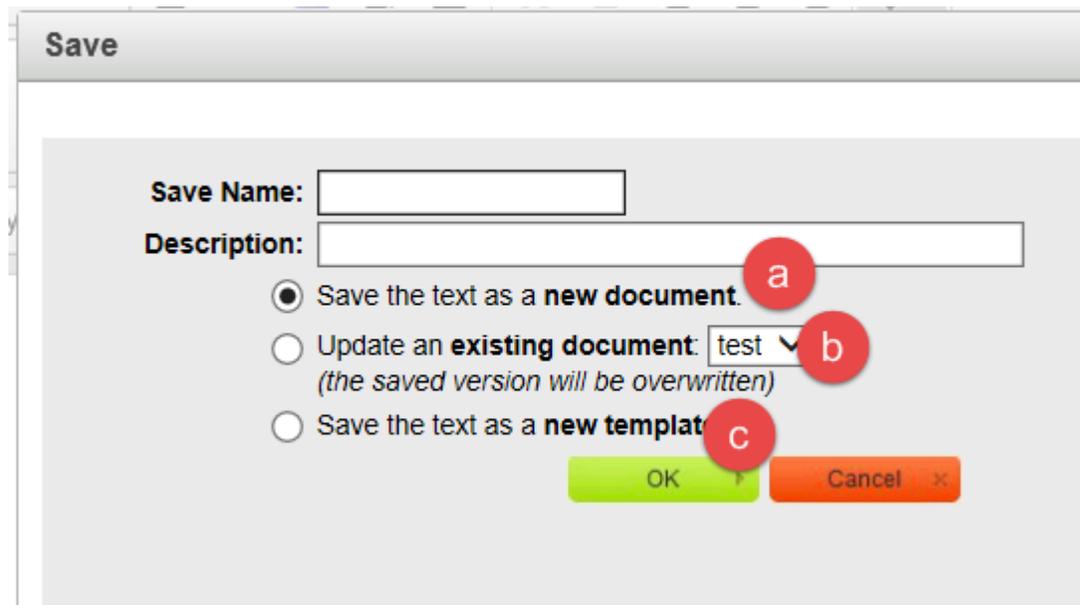


2. Click Save
3. In the Save box Enter the name of the template, a description of the template and choose the save option.
 - a. As a new document this means the template can only be seen by the log in used when the template was created. This template can be



seen when you choose the open icon

- b. Update and existing Document and choose the template to be replaced
- c. Save a new template. This can be seen and used by all staff with access to the database.

A screenshot of a 'Save' dialog box. The title bar says 'Save'. Inside, there are two text input fields: 'Save Name:' and 'Description:'. Below these are three radio button options: 'Save the text as a new document.' (selected), 'Update an existing document: test (the saved version will be overwritten)', and 'Save the text as a new template'. Red circles with letters 'a', 'b', and 'c' are overlaid on the first, second, and third options respectively. At the bottom are 'OK' and 'Cancel' buttons.

Archive Email

In Outlook (or whatever email program you use), include your organization's unique archive address as a BCC. The software will look at the address sent/replied to and place it on the communication history of the associated member.

1. To find your organization's domain address under Setup > General Options and Settings > Email Server Settings.
2. To create your unique archive email it will be archive@ourorganizationsdomain address. See example below.

The unique archive email for this example database would be archive@s5.chambermaster.com

This is the email address that would be added to a communication before sending it.

Notes:

- To use the archive feature, you must be sending the email from an email address that is listed as a staff email address under Setup->Employee/Reps.
- Emails forwarded or cc'd to archive@youraname when multiple members/ reps in your database share the same recipient address will be recorded in **Communication ->Unmatched Archive Emails**.
- In cases where there are two reps with an identical email address that belong to the same member, it will be recorded on that member's history.
- In cases where two reps with identical email address belong to two different members, the archived email will still go to the unmatched archive email list.



Groups

In this lesson

Groups Overview 32:49

How to create a group 33:19

Additional Options 34:16

[Add reps to roster](#) 37:08

[Add fees to a group](#) 38:30

[Constant Contact sync](#) 39:19

Use groups in MIC 42:10

[Create groups with custom report](#) 43:33

Create a Group

1. Click **Groups** in the left-hand menu
2. Click Create a **Group**

Filter Options [Clear Filters](#)

Group Type: - Do Not Filter - *Listing 5 groups.*

Display **active groups** only.  **Create a Group**

3. Complete the Create a New Group field for this new group.

Create a New Group

Group Name: x

Group Type: v

Status: v

Description: ^
v

4. Click **Save**

Additional options in Group setup

After the group is created click on the group name and set up the additional settings on the General tab.

1. Member Options

- a. **Allow members to view/search this group in Member Information Center** - When selected, this roster list will be shown as a group/interest that may be searched by members in the Member Information Center.
- b. **Allow members to join/leave this group within the Member Information Center.** - Once selected, this group name with its associated description will appear in a list of Group Participation possibilities for individual reps to select.
- c. **Allow members to send messages to this group.** – Allows members to contact the reps of this group from the Message Center in their MIC.

2. Public Options

- a. **Allow the public to view this group roster** - When selected, the Public Group checkbox will allow this group to display on your website in the Groups public module available at <http://yoursubdomain.yourdomain.com/groups>. Public module version 2.0 or 3.0 is required. Groups listed on the public website will display the individual rep name, their company name, their title, and their rep photo (if available). Rep photos are uploaded in the Member Information Center.
- b. **Allow the public to JOIN/LEAVE this group.** - This selection allows the public to add themselves to your group.

3. Additional Options

- a. **Display this group name on the Email Subscriptions opt-in/out page.** - This selection will ensure that the name of the group is displayed on the resulting opt-in/out page that uniquely displays for a recipient of an email when they click the Unsubscribe link in the bottom of their email. Giving them good information will assist them in making good decisions about which groups/ mailing lists they would like to receive communication.
- b. **Disable ability to opt-out from this groups' emails. (also overrides prior email opt-outs)** - Select this checkbox to make sure your board members or other committee members don't accidentally unsubscribe themselves from your group. Use only on rare occasions when you know your subscribers have agreed to this email relationship with you.

Adding reps to the group

1. For the group you would like to add reps to click on the **Roster** tab
2. Select the option that best fits how you would like to collect the reps.

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](#)

3. Once they are on the roster tab you have some customizing options
 - a. Adjust roster order – click the blue bars on the left-hand side and slice to correct order.



	Contact
☰	Michael Finkels
☰	Orly Iglesias
☰	Louis Imburgia
☰	Doug Keene
☰	Patrick Lee
☰	J. Robert Stobs

- b. Click on the Rep name to update group role or disable in the group

Company: F & F Construction Services, Inc.
Phone: (954) 454-1948
Fax: (954) 454-1259
eMail:

Mailing Address: 2617 Park RD.
Pembroke Park, FL 33009

Disabled in group

Group Role:

Notes:

- c. Contact the reps of this group from the Roster tab by clicking the Contact Members

Print List Download List Contact Members Add/Edit Roster Custom Fields

Assign a group fee

1. Click **Groups** in the left-hand menu.
2. Click the **Home** tab and then click the title of the desired Group.
3. Click the **Fees** tab.
4. Click **Assign Fee Item**.
5. Select the desired Group fee item from the **Fee Item Type** drop-down list.
6. Make changes as desired to the **Fee Item** fields.
7. Click **Save & Exit**.

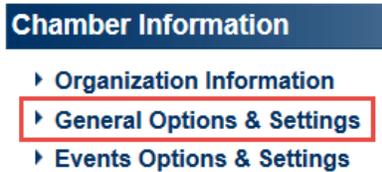
To create invoices for a group that has been assigned a fee item with a One-Time Billing Cycle, Bill Group Now must be selected on the Group Fees tab.

Creating invoices for a group that has been assigned a fee item with a Billing Cycle of Annual, Semi-Annual, Quarterly, or Monthly, allows you to invoice from the Billing module by selecting the Group Batch Type and the appropriate Billing Month. These fees are treated as recurring fees and will be included automatically in Group billing batch.

Set up the sync with Constant Contact

You must have an active account with Constant Contact to setup and use the synchronization tool.

1. Login to your database with administrator privileges.
2. Click **Setup** in the left-hand menu.
3. Click **General Options and Settings** in the Association Information (or Chamber Information) area.



4. Select Constant Contact from the Newsletter Solution drop-down box.

The image shows a "General Settings" form. It includes several checkboxes and dropdown menus. The "Newsletter Solution" dropdown menu is set to "ConstantContact", and a red arrow points to this selection. Other settings include "Default Member Status" (Active), "Chamber Login Timeout" (21600 seconds), "Member Login Timeout" (1800 seconds), and "Consumer Timeout" (1800 seconds).

5. In the Add-On Manager area click the blue link **Please click here to authorize the Constant Contact connection.**

ConstantContact Integration Setup

Tip: Make sure to select Constant Contact as your **Newsletter Solution** above in the **General Settings** section.

Best Practice for synched groups: If you need to remove a rep from a group that is synched to Constant Contact, make sure you **disable** the rep in their group (and not delete from the group). Disabled reps are removed from the Constant Contact list at the time of the synch. Disabling in a group is an option when a member is dropped and is also available by clicking into the group on the **Group Participation** section of the **Members->Reps** tab or when viewing the **Roster** tab of the group.

Note: Reps synched due to their membership type or because they are an active rep of an active/courtesy member will be removed from the Constant Contact lists when they are deleted or no longer meet the criteria. Disabling only applies to synched groups.

[Please click here to authorize the Constant Contact connection.](#)

- Automatically sync groups daily
(All active groups are initially selected to sync. Click Groups->Sync tab to specify only selected groups.)
- Automatically sync membership types daily
- Automatically sync all active reps for active and courtesy members
(Added to list: "All Active and Courtesy Representatives from ChamberMaster/MemberZone")

6. Follow the prompts to authorize the database with your Constant Contact account.
7. Choose which items you would like to have automatically synchronize each night. Automatically synchronize membership types daily, automatically synchronize groups daily, and/or Automatically sync all active reps for active and courtesy members to allow ChamberMaster to pass all ChamberMaster Membership Types, active reps and/or Group updates and additions nightly to your Constant Contact account. To select only specific groups, click the Synch tab in the Groups module. If you'd rather select only certain groups to be synched, then you'll need to deselect all others on the Synch tab in the Groups module. See [Selecting Which Groups to Synchronize](#) below for more info.

- Automatically sync groups daily
(All active groups are initially selected to sync. Click Groups->Sync tab to specify only selected groups.)
 - Automatically sync membership types daily
 - Automatically sync all active reps for active and courtesy members
(Added to list: "All Active and Courtesy Representatives from ChamberMaster/MemberZone")
-

8. Click **Save**.

Going forward, make any additions to these list or changes to contact information in your software. Each night a synch takes place and any added reps will be added. Any reps disabled will be removed. If a rep is deleted from the database they will not be removed. For best results, manage all additions and updates in ChamberMaster / MemberZone only and don't delete any records.

Note: Reps that have unsubscribed from your database mailing list will not be included in the synch to Constant Contact.

Groups in the Member Information Center

1. How a rep can add or remove themselves from a group or mailing list
 - a. From the Home page click **Personal**
 - b. Click **Groups/Interest**
 - c. Based on the settings of the group the can add or remove themselves from these list.

Groups/Interests

My Groups/Interests

Groups

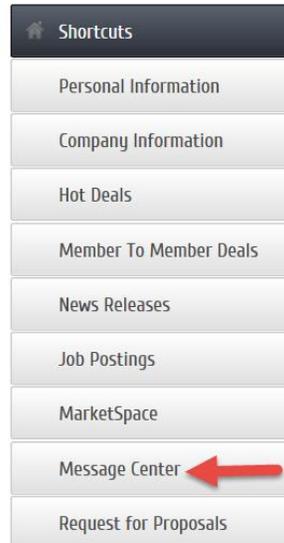
Select All

Committee

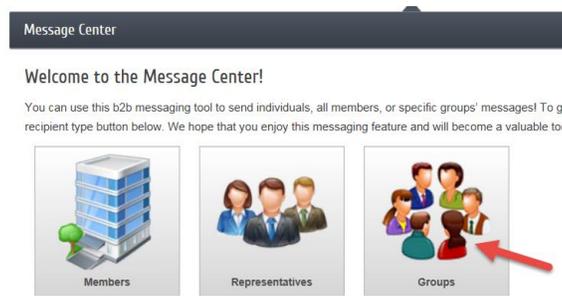
Monday group

Message a group from the Member Information Center

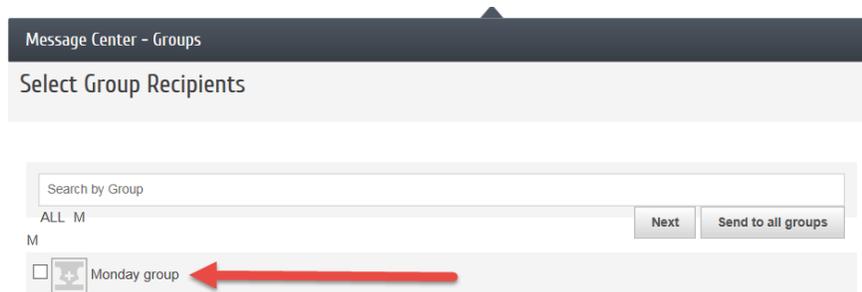
1. From the Home page click on **Message Center**



2. In the Message Center click on **Groups**



3. Select the group you would like to email



4. Click **Send to All**

Create a group from a custom report.

1. Click Reports in the left-hand menu.
2. Click Custom Member Report.
3. Select the desired fields and any other desired selections on the Member Listing screen.

Member Listing

Saved Reports *(optional)*

Load A Saved Report: [Delete Selected Report](#)

Fields Reported [clear fields](#)

Available Fields:

- ▶ [Contact Information](#)
- ▶ [Member Information](#)
- ▶ [Web-Page Information](#)
- ▶ [Billing Information](#)
- ▶ [Extended Member Information](#)
- ▶ [Custom Member Fields](#)
- ▶ [Custom Rep Fields](#)

Selected Fields:

Primary Sort:

Secondary Sort:

4. Click **Continue**

5. Select the desired filters and custom criteria.

Filters *(optional)*

Filter by Member Status: Active Non Member Inactive Courtesy Prospective

Filter by Membership Type: Bronze Silver Gold Star purple

Filter by Group:

Filter by Sales Rep:

Filter using Additional Criteria:

Criteria				
	Field Name	Operator	Value	
	Volunteer	EqualsExactly	Yes	<input type="text" value="x"/> remove
AND	Select a field	EqualsExactly		remove
AND	Select a field	EqualsExactly		remove

[Add Criteria](#)

Additional Options

Report Format: Table Style *(each field is listed in it own column)*
 Directory Style *(each field is listed on a new line)*
 Show field names for all data reported
 Customized Report Layout [select a template](#)

Save Report *(optional)*

Save Current Report As: [Save](#)

6. Click **View/Print Report**

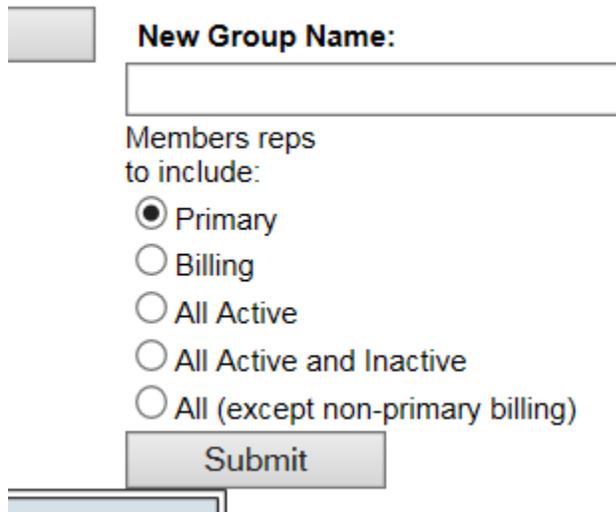
7. Verify the displayed contacts or those that should be included in the group.

8. Click Create Group.

9. Type the desired group name.

10. Select which reps should be included as group members.

11. Click Submit.



The screenshot shows a web form with a grey header bar. Below the bar, there is a label "New Group Name:" followed by a text input field. Underneath the input field, the text "Members reps to include:" is displayed. Below this text are five radio button options: "Primary" (which is selected), "Billing", "All Active", "All Active and Inactive", and "All (except non-primary billing)". At the bottom of the form is a grey "Submit" button. A horizontal line is visible below the "Submit" button.

12. Make any desired changes on the group General tab. You may also select to contact these members immediately by clicking Contact Members.