

ChamberMaster/MemberZone Working with Groups



- Working with Groups
 - Group Opt-out Disclaimer
 - Creating Groups
 - Group MIC Visibility
 - Group Public Visibility
 - Managing Group Roster
 - Managing Un-subscribes
 - Creating Groups from the Custom Reports

2019 Ambassadors



Joe Hanson
Lakeshore Marina



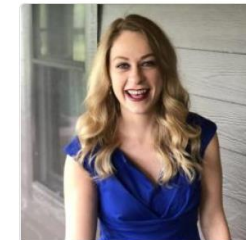
Captain Jan Keane
Big Fish Charters



Audra Winters
Get Pretty



Chad Bring
A Place for Dogs



Quinn Hanson
Chewy Chewy



Paul Macaroon
Macaroons

Working with Groups

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

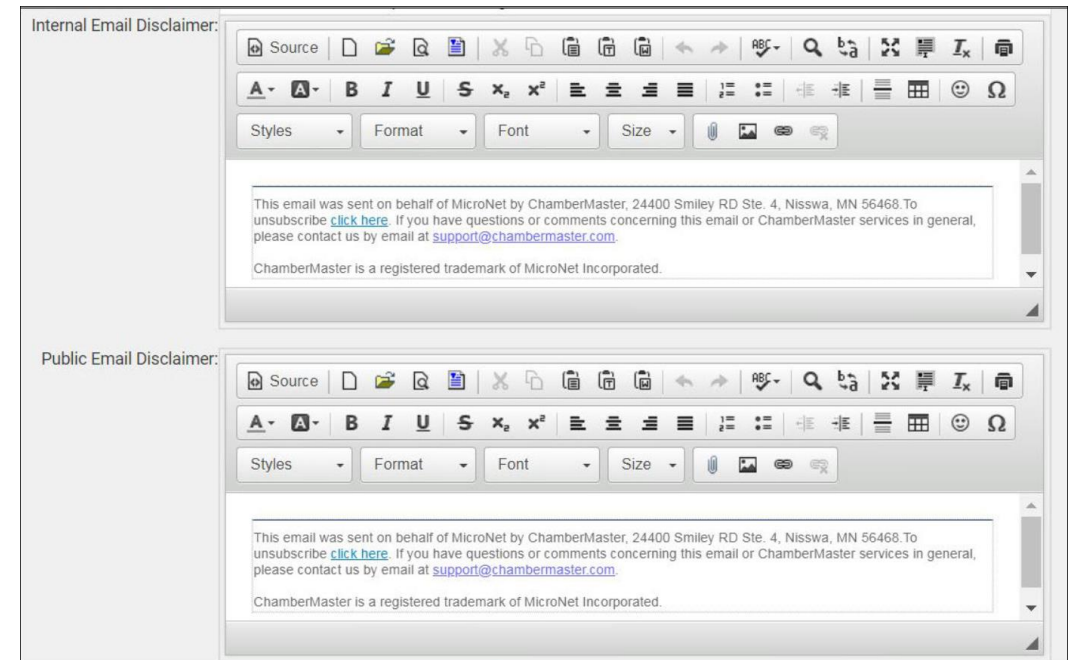
- For instance, if you frequently send emails to your Budget Committee . . instead of selecting the 12 members of that committee each time you send an email, you first create a group in the **Groups** module called the Budget Committee.
- Add each of the 12 members to that group. Then when you go to send the email, you simply select the Budget committee as the recipient of the email with one simple click.

Groups – Initial Setup

Configure Email Opt-out Message

- Opt-out message display at the bottom of emails sent from groups
- Default messages have been configured for you, but you may customize them as needed. Setup > General Options & Settings > Email Relay Service

WIKI: [Opt-out Messages](#)



Groups – Initial Setup

Group Types

- Setting up optional group types will make it easy for you to organize and filter on groups that may be created.
- You may create group types in advance or "on the fly" when you creating your groups. Examples of group types: Committee, Mailing List, etc.

WIKI: [Group Types](#)

Edit Group Types

Group Types
This page allows you to add new group types to be associated with groups.

Add/Edit/Remove Group Types:

- To **add** a new group type, enter new value into *New Group Type Name* text box and click add button
- To **edit** an existing group type select it from the *dropdown list* and make the changes in the *text box* below.
- To **remove** a group type select it from the *dropdown list* and press the *remove button*.

Add New Group Type

New Group Type Name:

Edit Existing Group Type

Edit Group Type:

Change Group Type Name To:

Allow Members to Join Group

WIKI: Create a Group

Create a New Group

Group Name:

Group Type:

Status:

☐ Synch this group with constant contact. [?](#)

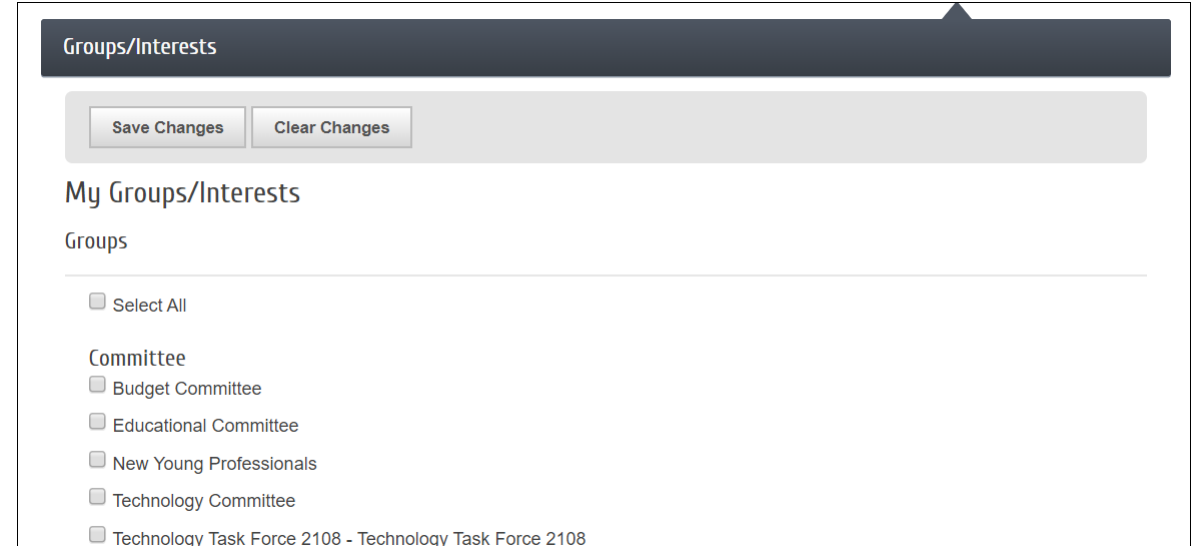
Description:

Allow Members to Join Group

Members may choose to join or remove themselves from groups that have been designated by Chamber staff

When a member logs into the Member Information Center, they are able to select the desired groups

WIKI: [Allow Members to Join Group](#)



The screenshot shows a web interface titled "Groups/Interests" in a dark header bar. Below the header is a light gray bar containing two buttons: "Save Changes" and "Clear Changes". Underneath this is the section "My Groups/Interests". A sub-section titled "Groups" is separated by a horizontal line. It contains a "Select All" checkbox. Below that is a "Committee" section with a list of groups, each preceded by an unchecked checkbox: "Budget Committee", "Educational Committee", "New Young Professionals", "Technology Committee", and "Technology Task Force 2108 - Technology Task Force 2108".

Allow Public to Join Group

Any group can be set so that visitors to your website could add themselves to your group

WIKI: [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 *

Organization *

Email *

Phone

Mailing Address

Mailing Address line 2

City

State

Postal Code

Country


Display Group Roster on Your Web-site







Any group of your **Groups** module can be marked to display on your public website

Check **Allow the public to view this group roster** on the **General** tab of the group you'd like to display publicly

WIKI: [Setting up your Board of Directors Group](#)

2019 Ambassadors



 <p>Joe Hanson Lakeshore Marina</p>	 <p>Captain Jan Keane Big Fish Charters</p>	 <p>Audra Winters Get Pretty</p>
 <p>Chad Bring A Place for Dogs</p>	 <p>Quinn Hanson Chewy Chewy</p>	 <p>Paul Macaroon Macaroons</p>

Manage Group Roster

Members can be added to the group from the group's **Roster** tab or you can add reps to groups from the member's **Reps** tab

WIKI: [Add Reps to Groups](#)

Groups

[Home](#) [General](#) [Roster](#) [Fees](#) [Sync](#) [Files](#)

Group Roster: 2019 Young Professionals

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: 2019 Young Professionals

	Contact	Company Name	Group Role	Notes	Fees	
	Bill Bennett	Fabulous Ferns		email: cheri.petterson@growthzone.com	120.00	<input type="checkbox"/>
	Ben Bowman	A Place for Dogs		email: bmckay@mailinator.com phone: (218) 546-5413	120.00	<input type="checkbox"/>

Manage Group Roster

You can track information specific to the representatives in your groups using custom fields.

WIKI: [Group Custom Fields](#)

New Custom Field

Field Name:

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

Data Type: Drop Down List

Visible to Public: ☐

Required: ☐

Limited Quantity: ☐ ?

List Items:

Drag items to set sort order. [Bulk Entry](#)

Item 1: Click to add text

Item 2: Click to add text

Item 3: Click to add text

+

Drag items below to remove them.

Continue

Cancel







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Disable/Remove reps from Groups

- If you disable a rep – they will remain in the group, but will not receive emails sent to the group
- If you remove them from the group – they are permanently removed, you will not have a record of their participation in the group
- WIKI: [Remove Representatives from Groups](#)

Display 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

Send Group Email

WIKI: [Send Group 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 members by location](#)
- [Add members by Join Date](#)

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 representatives by location](#)
- [Add representatives by Join Date](#)

Add Others

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

Email Recipients

Email	Company	Rep Name	
bmckay@mailinator.com	A Place for Dogs	Ben Bowman	<input type="checkbox"/>
mkilton@mailinator.com	A Place for Dogs	Mark Kilton	<input type="checkbox"/>
cheri.petterson@growthzone.com	Fabulous Ferns	Bill Bennett	<input type="checkbox"/>
<<edit address>>	Home Comfort Warehouse	Bill Mathewson	<input type="checkbox"/>
<<edit address>>	Lake Loire Resort	Bernadette Metais	<input type="checkbox"/>
bmetais@mailinator.com	Lake Loire Resort	Bernadette Metais	<input type="checkbox"/>
<<edit address>>	Lakes Plumbing	Anna Lane	<input type="checkbox"/>

Assign Group Fees

Fees may be assigned to a group or to certain individuals within the group

Groups may be created by you as desired to accommodate your billing needs or you may use groups that are already created

WIKI: [Group Billing](#)

Group Fees: 2020 Ambassadors

Fee Items for 2020 Ambassadors

Name	Description	Frequency	Next Billed	Amount*	
Monthly Lunch Fee		Monthly	Jan 2020	\$120.00	<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 Monthly Lunch Fee

Fee Item Type: Monthly Lunch Fee

Description:

Fee Amount: 120.00 (annually or one-time)

Billing Cycle: Monthly

Status: Active

Save Changes

Bill Group Now

Group Member Pricing for Monthly Lunch Fee

Fee Item Pricing: Variation Breakdown

Price	Assignments	Action
120.00	8 group members are associated with this fee at a price of \$120.00 annually.	Update Price

Manage Un-subscribes

- Mass email may be sent through the communications tab, by selecting Email to Multiple Members, or it may be created when sending Event Invites, or when sent from a Group.
- The internal disclaimer will be included on these emails, and the recipient will have the ability to opt-out of all mass emails, subscribe to other lists, or continue to receive emails
- WIKI: [Managing Opt-outs](#)

Email Subscriptions

for cheri.petterson@growthzone.com

☐ Continue receiving emails from CM MZ Training

☐ Unsubscribe me from Board Members

☒ Subscribe to other lists

[Business Directory](#) [Events Calendar](#) [Hot Deals](#) [Member To Member Deals](#) [Job Postings](#)
[Contact Us](#) [Weather](#)

Powered by
GrowthZone

Manage Un-subscribes

- You can view a list of all members who have unsubscribed from emails, and re-subscribe them, if applicable, from the **Manage Unsubscribed Email** report.
- WIKI: [Manage Unsubscribed Emails Report](#)

Member Contact Report

Filters

☐ Show Re-Subscribed addresses.

[Print List](#) [Manage Subscription](#)

Unsubscribed Addresses				
Address	Opt-Out Date	Type	Contact(s) Affected	Opt-Out Enabled
hanson@mailinator.com	1/6/2020	Mass Emails	Franks Franks Frank Hanson (Franks Franks)	<input checked="" type="checkbox"/>
jack@mailinator.com	1/6/2020	Group: Rowlett Training	Jack Jones (A Place for Dogs)	<input checked="" type="checkbox"/>
jack@mailinator.com	1/6/2020	Group: Technology Committee	Jack Jones (A Place for Dogs)	<input checked="" type="checkbox"/>
marks@mailinator.com	1/6/2020	Mass Emails		<input checked="" type="checkbox"/>

Questions?