

# ChamberMaster/MemberZone Working with Communications



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- Sending Emails
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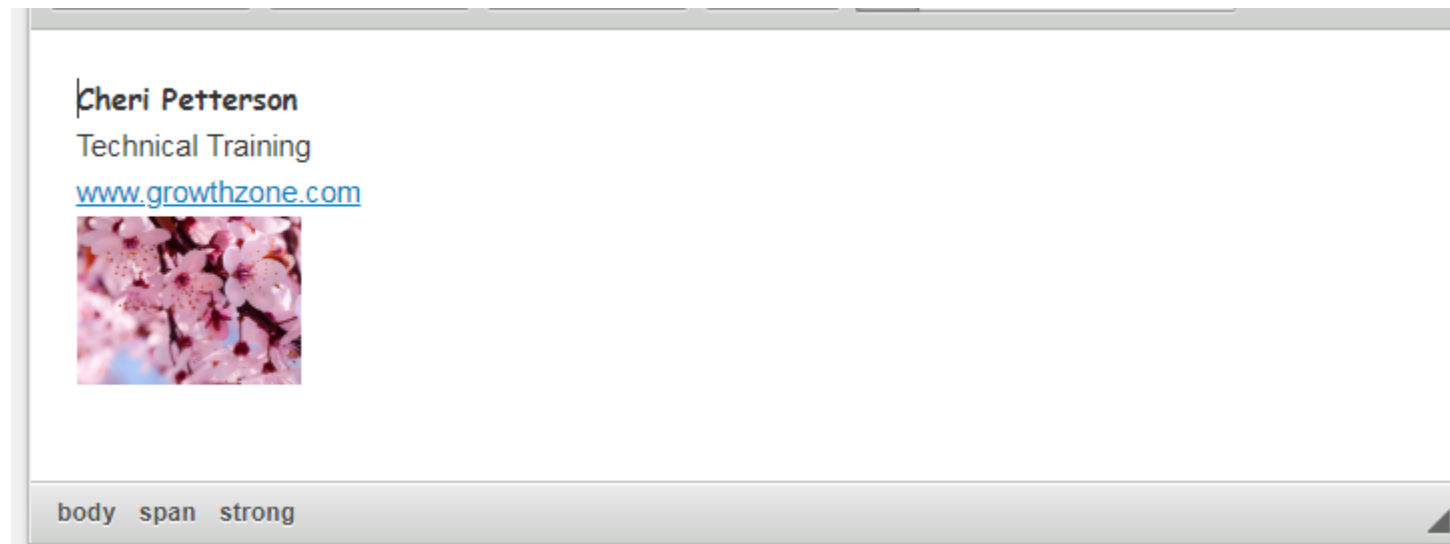


# Email Setup

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

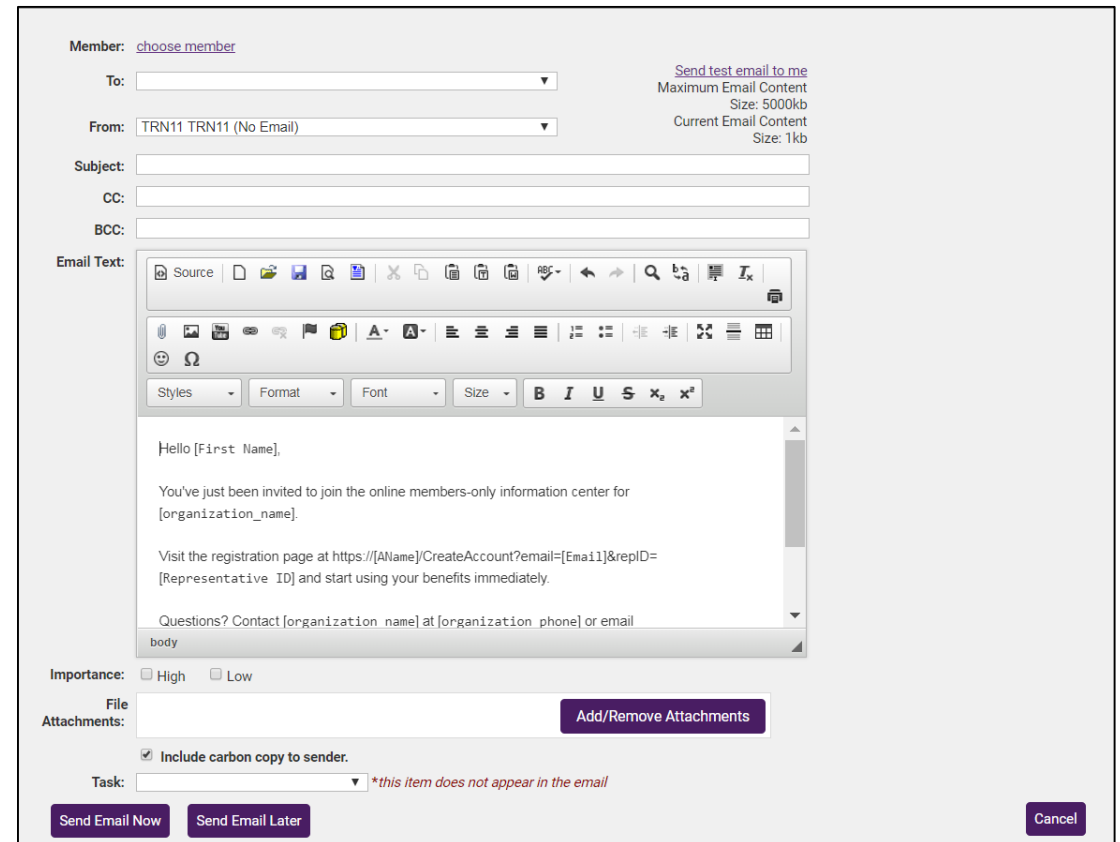
Design your signature block with any included text and graphics. You may also include items that would belong in the header such as your logo

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](#)

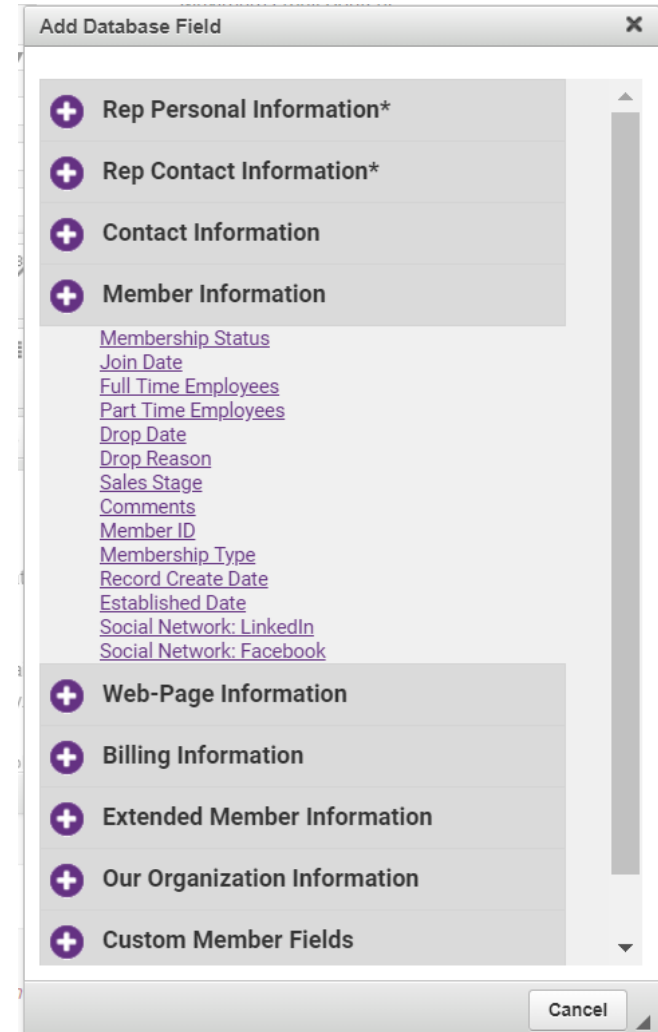


The screenshot shows the email composition interface in GrowthZone. At the top, there is a 'Member' dropdown menu set to 'choose member'. Below it are fields for 'To:', 'From:' (set to 'TRN11 TRN11 (No Email)'), 'Subject:', 'CC:', and 'BCC:'. To the right of the 'To:' field, there is a 'Send test email to me' link and information about email content limits: 'Maximum Email Content Size: 5000kb' and 'Current Email Content Size: 1kb'. The 'Email Text:' area features a rich text editor with a toolbar containing icons for source, undo, redo, bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, indent, outdent, and text alignment. Below the toolbar are dropdown menus for 'Styles', 'Format', 'Font', and 'Size', followed by buttons for 'B', 'I', 'U', 'S', 'x', and 'x²'. The main text area contains a draft email with the following content: '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'. Below the text area, there are 'Importance:' options for 'High' and 'Low', an 'Attachments:' section with a file input field and an 'Add/Remove Attachments' button, and a checked checkbox for 'Include carbon copy to sender.'. At the bottom, there is a 'Task:' dropdown menu with a note '\*this item does not appear in the email' and 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](#)



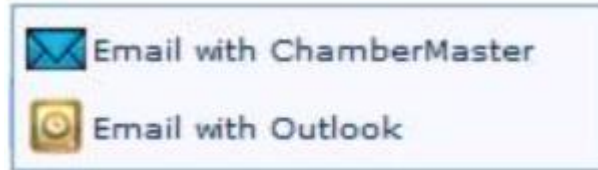
## Email Settings

- WIKI: [Public Disclaimer](#)
- Archive Email Address
- [archive@trainingchamberassoc.chambermaster.com](mailto:archive@trainingchamberassoc.chambermaster.com)
- [archive@trainingchamberassoc.chambermaster.com](mailto: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)

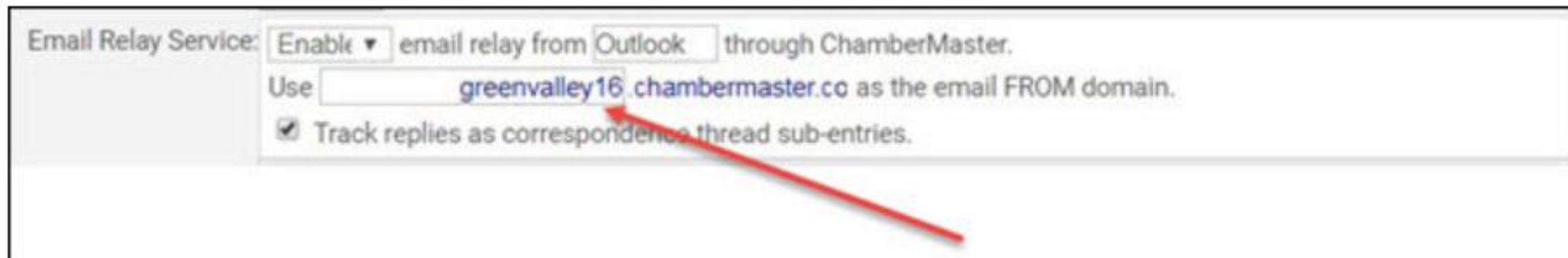
## Advantages to Sending Email with Outlook

- 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.

A red arrow points to the text "greenvalley16.chambermaster.co" in the "Use" field.

# Sending Emails

# Sending Emails

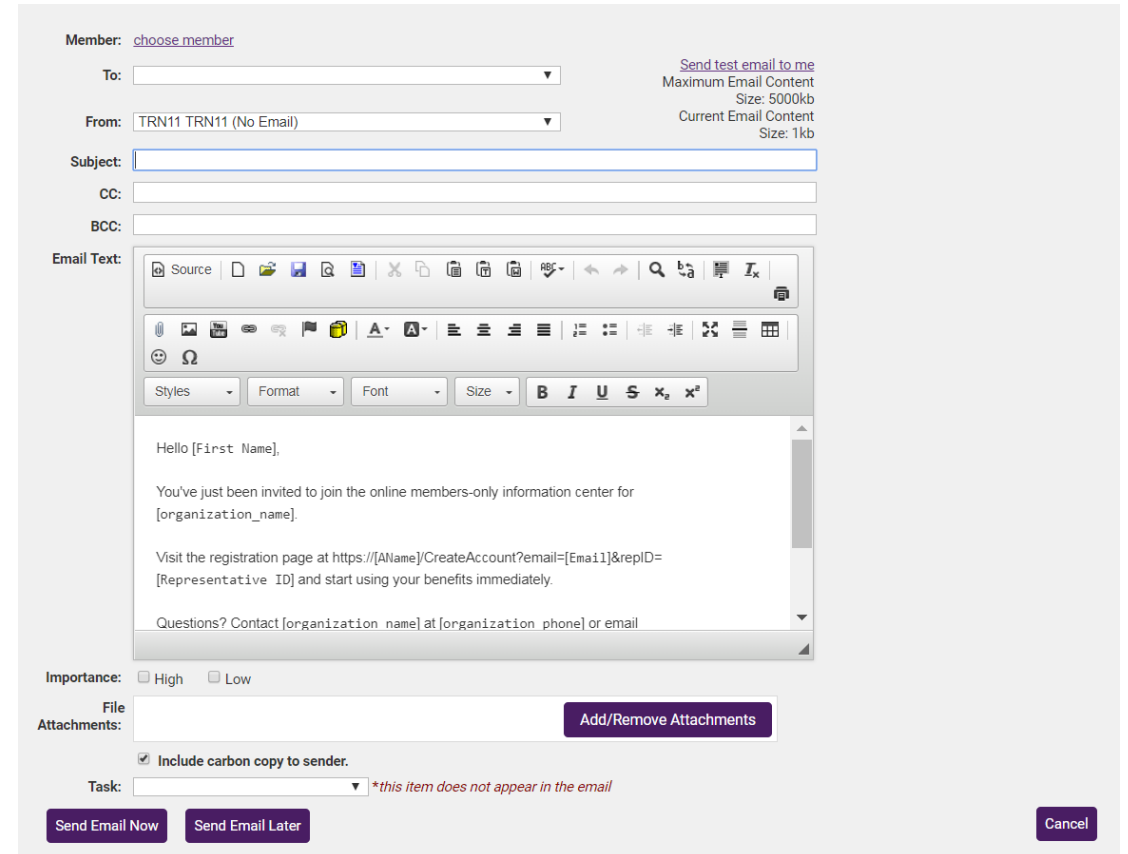
Emails may be sent from many different places in the software:

- 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 shows the email editor interface. At the top, it displays 'Member: 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:' area features a rich text editor with a toolbar containing icons for source, undo, redo, bold, italic, underline, strikethrough, link, unlink, list, indent, outdent, text color, background color, font size, and font face. 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.  
Questions? Contact [organization\_name] at [organization\_phone] or email'. Below the editor 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 menu is also visible with a note '\*this item does not appear in the email'. At the bottom, there are 'Send Email Now', 'Send Email Later', and 'Cancel' buttons.

# 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
<a href="mailto:mary@aol.com">mary@aol.com</a>	Brown's Shoes	<input type="checkbox"/>
<a href="mailto:main@highpointchamber.org">main@highpointchamber.org</a>	Business High Point	<input type="checkbox"/>
<a href="mailto:president@eno.edu">president@eno.edu</a>	Eno State University	<input type="checkbox"/>
<a href="mailto:flynn@mailinator.com">flynn@mailinator.com</a>	Flynn's	<input type="checkbox"/>
<a href="mailto:kjkggu@gmail.com">kjkggu@gmail.com</a>	FVCOC	<input type="checkbox"/>
<<edit address>>	Harry's	<input type="checkbox"/>
<a href="mailto:harry@mailinator.com">harry@mailinator.com</a>	Harry's Hair	<input type="checkbox"/>
<a href="mailto:layra@mailinator.com">layra@mailinator.com</a>	Laura's Decorating	<input type="checkbox"/>
<a href="mailto:maysoon@aol.com">maysoon@aol.com</a>	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"/>
<a href="mailto:info@leech-lake.com">info@leech-lake.com</a>	Roxie's Rascals	<input type="checkbox"/>
<<edit address>>	Sandy's Candy Store	<input type="checkbox"/>
<a href="mailto:lori@sheboygan.org">lori@sheboygan.org</a>	Sleeping for Dollars	<input type="checkbox"/>
<a href="mailto:golf@mailinator.com">golf@mailinator.com</a>	The Golf Club	<input type="checkbox"/>
<a href="mailto:fthomas@mailinator.com">fthomas@mailinator.com</a>	The Pasture Events & Convention Center	<input type="checkbox"/>
<a href="mailto:cheri.petterson@growthzone.com">cheri.petterson@growthzone.com</a>	The Yankee Shop	<input type="checkbox"/>
<<edit address>>	Tim's House by Me	<input type="checkbox"/>

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

# 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

Phone 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:  Contact Preference:

Company:  Address:

Phone:  City:

Fax:  State:

eMail:  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](#)

Questions?