



ChamberMaster

Serve and Empower Your Members.



INTRODUCTION TO INFO REQUEST

Brenda Lundeen
ChamberMaster

OUR SESSION INCLUDES . . .

- Basic setup of Info Request
 - General Interest check boxes
 - View/Print Leads
- Setup Lead List groups & manage leads
- Setup & distribute publications & emails
- Approx 1 hour session



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REMEMBER . . .

- ◎ Please ask questions throughout!
 - Send questions, comments, feedback on the GotoWebinar Questions area anytime
- ◎ Q&A time at the end
 - If you are connected via voice line, you'll be able to ask question verbally
 - Click Raise Hand; wait to be recognized; ask question; all participants will hear question
 - May also converse privately through Q&A in Questions area



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INFO REQUEST MODULE OVERVIEW

- ◉ Simple, fill-in-the blank form to record the requests for information
 - Consumer info
 - Check boxes for interests
 - Check boxes for requested literature/info
 - Travel dates
 - Lodging requirements
- ◉ Optionally integrated with your chamber's local web site



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BENEFITS OF USING INFO REQUEST

- Information delivered to consumers
 - Emails automatically sent
 - Printed literature queued
 - Labels automatically generated
- Leads can be distributed to members
- Reports available on requests

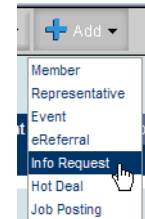


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ACCESS THE FORM

- Info Request - Enter Information Request
- Add button->Info Request
- From your own website (selections may be limited)



Consumer Information				
Name: <input type="text"/>	eMail: <input type="text"/>			
Company: <input type="text"/>	Phone: <input type="text"/>			
Mailing Address: <input type="text"/>	Fax: <input type="text"/>			
City/State/Zip: <input type="text"/> <input type="text"/> <input type="text"/>	Contact By: Not Specified <input type="text"/>			
Country: <input type="text" value="United States"/>	<input checked="" type="checkbox"/> Release Information			
<input type="button" value="Send Quick Referral"/>				
General Interests				
<input type="checkbox"/> Moving to the area	<input type="checkbox"/> Ice Fishing	<input type="checkbox"/> Vacationing		
<input type="checkbox"/> Attractions	<input type="checkbox"/> Winter Activities	<input type="checkbox"/> Fall Activities		
<input type="checkbox"/> Conferences	<input type="checkbox"/> Spring Activities	<input type="checkbox"/> Festivals & Events		
<input type="checkbox"/> Summer Activities	<input type="checkbox"/> Outdoor Sports	<input type="checkbox"/> Golfing		
<input type="checkbox"/> Shopping & Restaurants	<input type="checkbox"/> Mountain Climbing Activities			
Information/Publications Requested (to be sent to consumer)				
<input type="checkbox"/> email	Hot Deals eNewsletter Mailing List (email only)			
<input type="checkbox"/> email	<input type="checkbox"/> mail	Camping in the Valley Region	<input type="checkbox"/> mail	Golf Guide
<input type="checkbox"/> mail	<input type="checkbox"/> mail	Relocation Guide	<input type="checkbox"/> mail	Shopping Guide
<input type="checkbox"/> mail	<input type="checkbox"/> mail	Travel Guide	<input type="checkbox"/> mail	Travel Guide C
<input type="checkbox"/> email	<input type="checkbox"/> mail	Visitor Guide Book		

BASIC SETUP

○ Customize

- General Interest check boxes
 - Setup->General Interest Options
- Referred by selections
 - Setup->Consumer Referred By Options
- Trip purpose selections
 - Setup->Consumer Trip Purpose Options

Information Request

- | | |
|--|---|
| ▶ Consumer "Trip Purpose" Options | ▶ Consumer "Referred By" Options |
| ▶ Travel Lead List Contact Groups | ▶ Consumer "Interest" Options |
| ▶ General Lead List Contact Groups | ▶ Chamber Publications |
| ▶ Events Calendar: View/Edit Event Types | ▶ Publication Distribution/Delivery Methods |
| ▶ Preview Public Information Request Pages | ▶ eReferral Settings/Options |
| ▶ Install Quick-Communication Application | |



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VIEW AND EDIT LEADS

◉ Info Request ->Lead Management

Filter Options [Clear Filters](#)

Consumer Name:

Interest Category: [edit interests](#)

Lead Delivery Status:

Travel Leads:

Request Date: [use today's date](#)

▶ Use a Date Range

Include leads from consumers who **did not** authorize the release of their information.

▶ Refresh Listing ▶ Distribute Travel Leads ▶ Distribute General Leads

Sort Order:

Information Request Leads								
Action	Request Date	Consumer Name	Interests	Release Info	Travel Lead	General Lead Sent	Travel Lead Sent	Delete
edit	01/24/2011	Jim Coons	1 interests selected	Yes	No	No	No	<input type="checkbox"/>
edit	01/24/2011	John Simonson	4 interests selected	Yes	No	No	No	<input type="checkbox"/>

▶ Print Summary Listing ▶ Print Detailed Listing ▶ Download Detailed Listing ▶ Remove Completed Leads

▶ Refresh Listing ▶ Distribute Travel Leads ▶ Distribute General Leads

SETUP & DISTRIBUTE LEADS TO MEMBERS

- Create lead list groups in Groups module
- Associate groups with general interests
 - Setup->General Lead List Contact Groups
- Designate one as a travel lead contact
 - Setup->Travel Lead List Contact Groups
- Each request may be one or both types of leads - general interest lead &/or travel lead
- Pass leads to members daily/weekly
 - Info Request-Lead Management->Distribute General Leads (and Distribute Travel Leads)



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DISTRIBUTE PUBLICATIONS/INFO

- Setup list of publications and email attachments
 - Setup->Chamber Publications
- When selected, printed publications labels are queued for printing and handled at your convenience
 - Task List ->Pub. Requests->Print Mailing Labels
- Mailing labels are generated for you with a mailing code indicating literature piece
- Email attachments are automatically sent
 - Info Request->Publication Distributions (to see list of emailed publications)

Task List	
2	Hot Deals
0	New Events
1	Job Postings
4	Pub. Requests
1	Reminders
6	QB Updates



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ADD NEW PUBLICATION

The yellow highlighting indicates the required fields. All other fields are optional.

Delivery Options indicate the format of this publication -- printed or a file. If downloadable is selected, the filename will be specified below and sent as an email attachment to the consumer.

Click the Publication Icon check box if an icon for this publication/email is desired. Then click Browse..., double-click the desired image. Click Refresh Image.

Click the Mail Code check box to place a code on the mailing labels that indicate the publication requested. Then type a unique combination of letters and numbers in the Mail Code box. Example: VG for Visitors Guide

Click the Downloadable File check box if you selected downloadable file as a delivery method. Then click Browse..., double-click the desired file. Click Refresh File. This will send as an attachment to the consumers email address.

Click Add/Remove Interests to select a specific General Interest option(s) that if selected by a consumer on the public website, will display this publication/email as a suggestion. Applicable only on the public website.

Name:

Description: 200 chars available

Display on Website: Publication is available to consumers visiting the Information Request area.

Delivery Options: Publication is downloadable. (Specify file in the "Downloadable File:" area below.)
 Publication can be sent by mail.

Default:

Default Is Checked: Default this publication as being selected when it is displayed to consumers.

Inventory:

Type the name and description of the new publication.

Consumers and employees will view this name and description.

Check this box if this publication is to be displayed on the public website.

Select the default format for consumers on the public website.

Type the quantity of printed publications available on hand.

Publication Icon (maximum size: 75 x 75 pixels)

Include an icon image with the publication.

Select Image: (click "Refresh Image" to view the image)

Mail Code

Mail code printed on mailing labels to indicate the publication(s) requested by a consumer.

Mail Code:

Required if setting up a printed publication.

Downloadable File (maximum size: 2047 KB)

Include an downloadable version of the publication (required for the "Download" delivery option).

Select File: (click "Refresh File" to update the file link)

Required if setting up an email attachment.

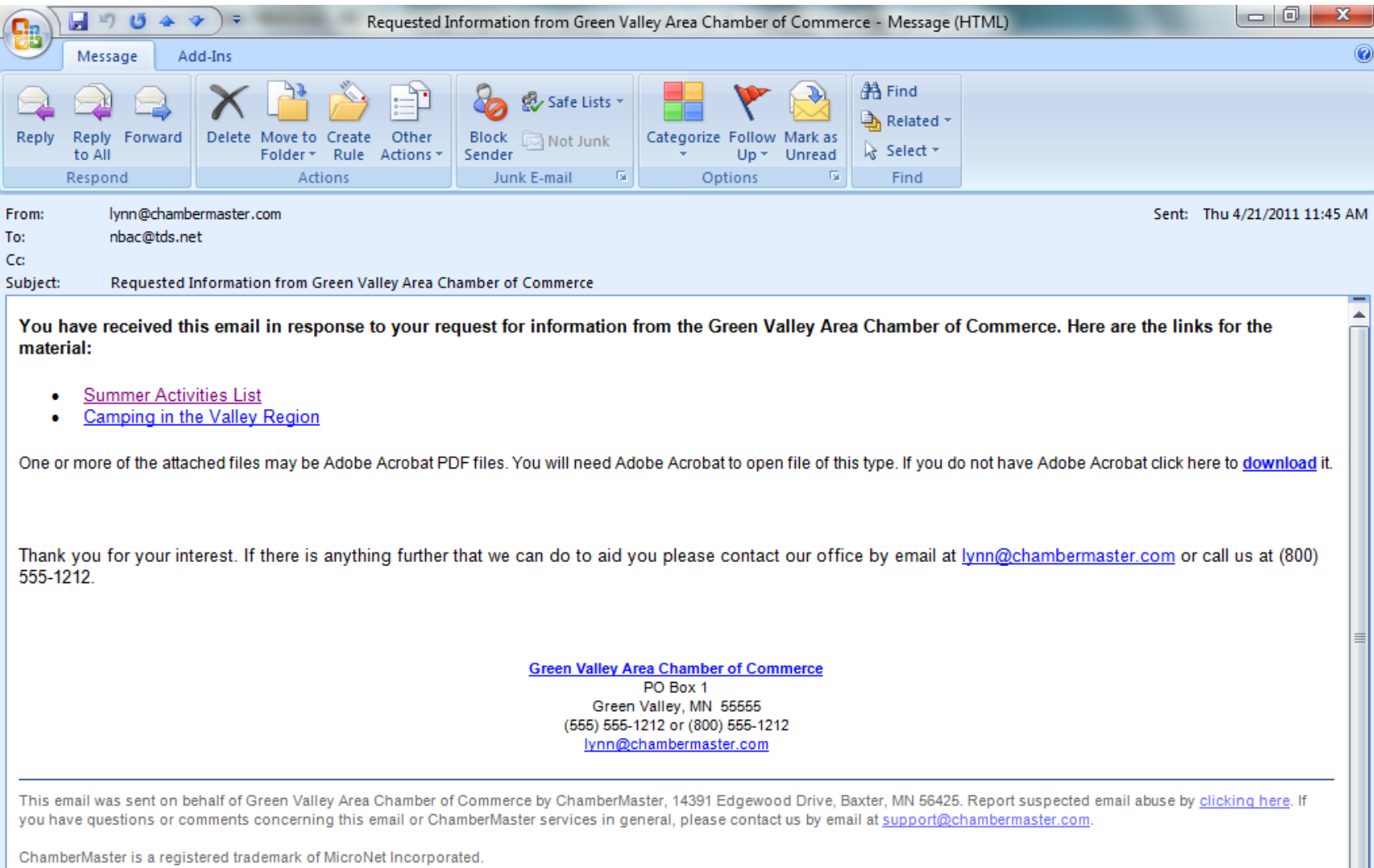
Click Save Changes when finished.

This publication will be displayed in the Information Request area of the software. It can be associated with a specific Interest below.

Associated Interest Categories:

Sort Order	Name/Title	Prompts for Travel Info	Number of Rep Contacts	Number of Links	Number of Publications
There are no Interest Categories associated with this publication.					

SAMPLE EMAIL SENT WITH DOWNLOAD LINKS



Requested Information from Green Valley Area Chamber of Commerce - Message (HTML)

Message Add-Ins

Reply Reply Forward to All Respond

Delete Move to Folder Create Rule Other Actions

Block Sender Safe Lists Not Junk Junk E-mail

Categorize Follow Up Mark as Unread Options

Find Related Select Find

From: lynn@chambermaster.com Sent: Thu 4/21/2011 11:45 AM
To: nbac@tds.net
Subject: Requested Information from Green Valley Area Chamber of Commerce

You have received this email in response to your request for information from the Green Valley Area Chamber of Commerce. Here are the links for the material:

- [Summer Activities List](#)
- [Camping in the Valley Region](#)

One or more of the attached files may be Adobe Acrobat PDF files. You will need Adobe Acrobat to open file of this type. If you do not have Adobe Acrobat click here to [download](#) it.

Thank you for your interest. If there is anything further that we can do to aid you please contact our office by email at lynn@chambermaster.com or call us at (800) 555-1212.

[Green Valley Area Chamber of Commerce](#)
PO Box 1
Green Valley, MN 55555
(555) 555-1212 or (800) 555-1212
lynn@chambermaster.com

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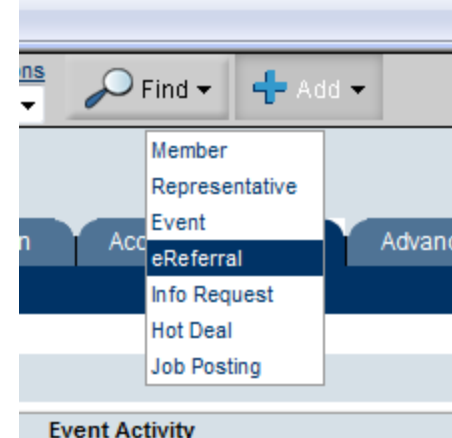
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WEBSITE ONLY “TWEAKS”

- Add a graphic next to publication name
 - Setup->Chamber Publications
- Determine which publications should show by default when an Interest is selected
 - Setup->Consumer Interest Options
- Display pertinent URLs on Thank you screen based on selected interests
 - Setup->Consumer Interest Options

DON'T FORGET - EREFERRAL

- If needing to send out member information “on-the-fly”, remember the eReferral option
- **Info Request ->Add an eReferral**, click Quick Referral on Info Request form, or click eReferral on the Add button.



QUESTIONS OR ASSISTANCE?

Click [Request Support](#)

1-800-825-9171

support@chambermaster.com



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