A close up of a logo

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# MARKETING

& ROSTER OUTREACH

Guide Created by Binghamton University

#### HELPFUL ROSTER MANAGEMENT TOOLS

* **Member Uploads**
  + *How To Do?*
    - Individually? Group > Members > ‘Add Member’ > Add Email Of Individual (Or Multiple) Users > ‘Add.’
    - Paste An Email List? Group > Members > ‘Add Member’ > ‘Paste Emails’ > Paste User Email List > ‘Apply.’
    - In Bulk? Group > Members > ‘Upload Members’ (Under Main ‘Member’ Menu) > Download Excel Sheet > Fill It Out According To CampusGroups Instructions > Upload File.
* **‘Current Members’ Dropdown (View Different Member Types)**
  + *Where To Find?*
    - Group > Members > Current Members Dropdown.
* **‘Contact’ Functionality**
  + *Where To Find?*
    - Group > Members > Contacts (Under Main ‘Member’ Menu).
  + *How To Do?*
    - Individually? Check Bubble Next To ‘Contact’ (Near Individual Username).
    - In Bulk? Check Box (Top Left Corner) > Check Boxes Next To Contact Users > 3 Dots (Top Right Corner) > ‘Make Contact.’
* **Member Tags / Sub-Group Tags**
  + *What’s The Difference?*
    - Member Tags are back-end tags Officers assign Members. They are hidden from Members and other front-end users.
    - Sub-Group Tags are front-end tags that Officers can assign Members or Members can assign themselves/each other. They are visible to everyone.
  + *Where To Find?*
    - Group > Members > ‘Member Tags’ / ‘Sub-Group’ Tags Dropdown.
  + *How To Do?*
    - Individually? Group > Members > ‘Edit Member Tags’ / ‘Edit Sub-Group’ Tags (Next To Individual Username) > Click ‘Edit’ > Create Member Tag / Sub-Group Tag > ‘Submit.’
    - In Bulk? Same Instructions As Above (Create Tag FIRST) > Select The Other Users This Tag Applies To > 3 Dots (Top Right Corner) > ‘Add Member Tag.’
* **Generate Report**
  + *Where To Find?*
    - Group > Members > Select Members You Want A Report On > 3 Dots > ‘Generate Report.’
* **Close Group Membership.**
  + *Instructions On Separate Cheat Sheet.*
* **Validate / Un-validate Members**
  + *Instructions On Separate Cheat Sheet.*

#### HELPFUL EMAIL MARKETING / OUTREACH TOOLS

* **Send Email From Member List**
  + *How To Do?*
    - Group > Members > Select Members You Want To Email > ‘Send Email’ (Top Right) > Create Your Email > Send.
* **Create A Mailing List**
  + *How To Do?*
    - Group > Members > Select Sub-Groups You Want To Add To Mailing List > Click On “Save Selection As Mailing List.”
* **Emails Tracking**
  + *Where To Find?*
    - Group > Emails > Emails Tracking (Under Main ‘Member’ Menu).
  + *Where To Find?*
    - Group > Emails > Sent > ‘Details’ (Right Side) OR 3 Dots > Stats.
* **New CampusGroups Email Builder**
  + *How To Do?*
    - Group > Emails > Orange ‘Compose Email’ Button > Select Recipients > Orange ‘Compose Email For Selected Groups’ Button > Choose ‘Email Builder.’
* **Import An Email Template** 
  + *How To Do?*
    - Group > Emails > Templates > Create Template > Copy Old Newsletter’s HTML/CSS > Paste It In The Source Of The WYSIWYG.
    - A screenshot of a social media post

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#### CAMPUSGROUPS ARTICLES

* [Managing All Members Of A Group](○%09https:/help.campusgroups.com/en/articles/1105756-managing-all-members-of-a-group)
* [What Is The Difference Between A Member & A Contact](○%09https:/help.campusgroups.com/en/articles/3193863-what-is-the-difference-between-a-member-and-a-contact)
* [How Manage Members With Tags](○%09https:/help.campusgroups.com/en/articles/1106039-how-to-manage-members-with-tags)
* [How To Add New Members To Your Group](○%09https:/help.campusgroups.com/en/articles/1106047-how-to-add-new-members-to-your-group)
* [How To Importing Members To Your Group](○%09https:/help.campusgroups.com/en/articles/1106042-how-to-import-members-to-your-group)
* [How To Do A Mass Upload Of Members & Officers In Different Groups At Once](○%09https:/help.campusgroups.com/en/articles/1885780-how-to-do-a-mass-upload-of-members-and-officers-in-different-groups-at-once)
* [How To Send An Email With A Template](○%09https:/help.campusgroups.com/en/articles/1105859-how-to-send-an-email-with-a-template)
* [How To Email A List Of Contacts (Non-Members)](○%09https:/help.campusgroups.com/en/articles/1105830-how-to-email-a-list-of-contacts-non-members)
* [How To Email Targeted Lists Of Members](○%09https:/help.campusgroups.com/en/articles/1105847-how-to-email-targeted-list-of-members)
* [How To Add Click-boxes To Your Email](○%09https:/help.campusgroups.com/en/articles/1105845-how-to-add-clickboxes-to-your-email)
* [How To Publish An Email As A Newsletter On Your Website](○%09https:/help.campusgroups.com/en/articles/1105728-how-to-publish-an-email-as-a-newsletter-on-your-website)
* [How To Add News To Your Email](○%09https:/help.campusgroups.com/en/articles/1374304-how-to-add-news-to-your-email)
* [How To Add Anchors To Your Emails](○%09https:/help.campusgroups.com/en/articles/1105900-how-to-add-anchors-to-your-emails)
* [How To Insert Images In Your Emails](○%09https:/help.campusgroups.com/en/articles/1105908-how-to-insert-images-in-your-email)

#### NEED MORE HELP?

1. Explore CampusGroups Resource Articles [http://help.campusgroups.com.](http://help.campusgroups.com/)
2. Click “?” on bottom right to access CampusGroups Support.
3. Email campus contacts (insert campus contact emails).