

# Create Chapter Board Transition Group and Email

The following topics are covered in this section. Click on a topic to go to that section. Two methods to create the Transition Email Group are discussed. Select the one that is best for your Chapter.

[Method 1 - Create Chapter Board Group for Transition Meeting](#)

[Method 2 - Create Smart Group for Transition Meeting](#)

[Create Chapter Board Email for Transition Meeting](#)

## Method 1 - Create Chapter Board Group for Transition Meeting

In early May or as soon as the Chapter Board for the new fiscal year is determined, the VP Membership or Web Administrator needs to create the Transition Chapter Board Mailing group. There are several methods available to create a new Chapter Board email group for the Transition Meeting, including a Chapter Board Smart group. Two of these methods are discussed below. For the sake of demonstration, the Phoenix Chapter is used in this example. Modify as needed for your Chapter. If you have any questions, contact your Website Administrator or [is.help@arcsfoundation.org](mailto:is.help@arcsfoundation.org)

### 1. Create New Fiscal Year Board Group

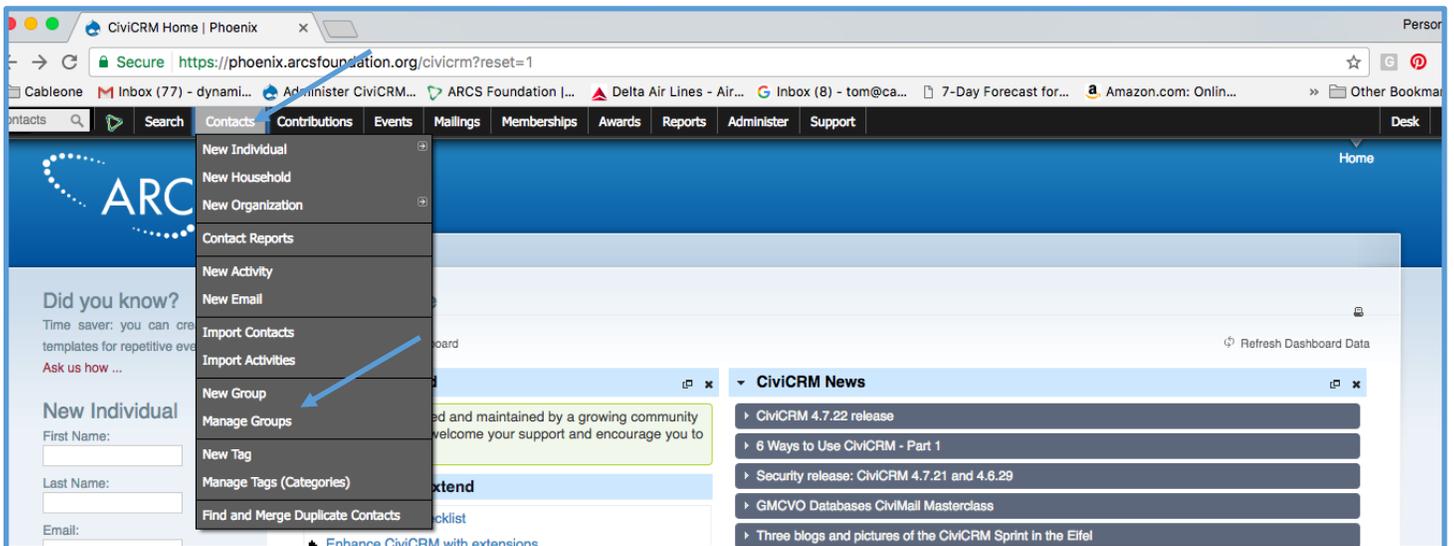
Obtain the final list of the new fiscal year alpha Chapter Board members to create the new fiscal year Chapter Board Group. For the purposes of our example, we will create the new group **phx\_2017-2018 Chapter Board**.

**Step 1:** Select **Login**

**Step 2:** Select **CiviCRM**

**Step 3:** Select **Contacts** Tab on Black Line

**Step 4:** Select **Manage Groups**



**Step 5:** To show more entries on one page, adjust entries to show **100**

**Find Groups**

Find  Created By  Type  Access Control  Mailing List Visibility  Status  Enabled  Disabled

*Complete OR partial group name. Complete OR partial creator name. Filter search by group type(s). Filter search by visibility.*

Show  entries [Update Smart Group Counts](#)

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

**Step 6: Scroll to phx\_General Members and select Contacts**

Find  Created By  Type  Access Control  Mailing List Visibility  Status  Enabled  Disabled

*Complete OR partial group name. Complete OR partial creator name. Filter search by group type(s). Filter search by visibility.*

Show  entries [Update Smart Group Counts](#)

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

Name	Count	Created By	Description	Group Type	Visibility	
phx_2016-2017 Chapter Board	30		Chapter Board - Mailing List	Mailing List	User and User Admin Only	<a href="#">Contacts</a> <a href="#">Settings</a> <a href="#">more ▶</a>
phx_2017-2018 Fiscal Year All Scholars	40	Might, Diane	All ASU, NAU and UA scholars for fiscal year 2017-2018	Mailing List	User and User Admin Only	<a href="#">Contacts</a> <a href="#">Settings</a> <a href="#">more ▶</a>
phx_Financial	0		Financial	Mailing List	User and User Admin Only	<a href="#">Contacts</a> <a href="#">Settings</a> <a href="#">more ▶</a>
phx_Friend of ARCS	134		Mailings and Addressing Luncheons. List of Prospective Donors, Past Donors and Prospective Members. Use for Mailings and Addressing Luncheons.	Mailing List	User and User Admin Only	<a href="#">Contacts</a> <a href="#">Settings</a> <a href="#">more ▶</a>
phx_General Member	85		General Member - Access Control and Mailing List	Mailing List	User and User Admin Only	<a href="#">Contacts</a> <a href="#">Settings</a> <a href="#">more ▶</a>

**Step 7:** Scroll to the bottom and adjust rows per page to **100 or more** depending on the number of Chapter members. This will make it easier to select the new Chapter Board.

**Step 8:** Check **boxes** in front of each name who will be on the **NEW CHAPTER BOARD** that is being created. For demonstration purposes, those will be the first four selections on the list below.

**Step 9:** Select **Actions**.

Find Contacts within this Group

85 Contacts    Group(s) In phx\_General Member ...AND...  
Group Status "Added"    » Advanced Search

Select Records:     All 85 records     4 Selected records only

Actions

Next >    Last >>    Contact 1 - 50 of 85    Page 1 of 2

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

\* Reset all selections

<input type="checkbox"/>	Status	Name	Address	City	State	Postal	Country	Email	Phone	Action
<input checked="" type="checkbox"/>	Added	Adelson, Barbara Jean	2134 East Georgia A...	Phoenix	AZ	85016	United States	barbara_adelso...	602-466-1565	View Edit more
<input checked="" type="checkbox"/>	Added	Alexander, Diana	10031 North Alder S...	Oro Valley	AZ	85737	United States	diana616062@gm...	301-538-2752	View Edit more
<input checked="" type="checkbox"/>	Added	Anixter, Nancy	23005 North 74th St...	Scottsdale	AZ	85255	United States	nanixter@mac.com	480-991-7236	View Edit more
<input checked="" type="checkbox"/>	Added	Archer, Jeanne	5628 North Palo Cri...	Paradise Valley	AZ	85253	United States	j.w.archer@cox...	602-508-8966	View Edit more
<input type="checkbox"/>	Added	Auran, John	5434 East Lincoln D...	Paradise Valley	AZ	85253	United States		480-483-6062	View Edit more
<input type="checkbox"/>	Added	Austerman, Ceda	9840 North 110th St...	Scottsdale	AZ	85259	United States	cedaausterman@...	480-745-8448	View Edit more

**Step 9: Select Add Contacts to Group**

Find Contacts within this Group

85 Contacts    Group(s) In phx\_General Member ...AND...  
Group Status "Added"    » Advanced Search

Select Records:     All 85 records     4 Selected records only

Actions

- Add Contacts to Event
- Add Contacts to Group**
- Add Contacts to Household

Page 1 of 2

N O P Q R S T U V W X Y Z All

**Step 11: Select Create New Group**

**Step 12: Group Name:** In this case it will be the new fiscal year Board i.e. phx\_2017-2018 Chapter Board

**Step 13: Description:** Enter description i.e. Chapter Board – Mailing List (or whatever you like)

**Step 14: Group Type:** Select Mailing List

**Step 15: Select Add to group**

**Add Contacts to A Group**

Add Contact To Existing Group     Create New Group

Group Name: \*    phx\_2017-2018 Chapter Board

Description:

Group Type     Access Control     Mailing List

Number of selected contacts: 4  
[View Selected Contacts](#)

Note: If a new Chapter Board Member is not yet listed on the Chapter General Member group, they can be added to the Chapter Board Group by searching and finding the member's **Contact Record > Groups tab** and follow prompts to add the member to the **phx\_2017-2018 Chapter Board** group. If they are a new member, who has not yet been added to the Chapter General Member group, add them here as well.

## **2. Remove Members from the Chapter Board Group Who Are Going Off Board**

Now that the new group **phx\_2017-2018 Chapter Board** has been created, remove the members who are not returning to the Chapter Board. NOTE: This is also a method to remove members from the Chapter Board group due to resignation, death or other unexpected circumstances. Here is how to remove members from a group:

**Step 1:** Select **Contacts tab** on Black Line

**Step 2:** Select **Manage Groups**

**Step 3:** Scroll to **phx\_2017-2018 Chapter Board** that was just created above.

**Step 4:** Select **Contacts**

**Step 5:** If you should need to remove member(s) from the **Group**, check the box(es) in front of the name(s) you want to remove.

**Step 6:** Select **Actions**

**Step 7:** Select **Remove Contacts from Group**.

**Step 8:** Select **View Selected Contacts**

**Step 9:** If you are sure these are the contacts you want to remove, select **Remove from Group**.

**Note: Never delete a contact from the group or the contact record will be deleted. Contact the Website Administrator or [is.help@arcsfoundation.org](mailto:is.help@arcsfoundation.org) immediately to restore the contact or go to Search > Advanced Search and check box Search in Trash to restore the contact.**

## **Confirm the New Chapter Board Group is Correct!**

**Step 1:** Select **Contacts Tab** on Black Line

**Step 2:** Select **Manage Groups**

**Step 3:** Scroll to **phx\_2017-2018 Chapter Board**

**Step 4:** Select **Contacts**

**Step 5:** Confirm the contacts are the new **phx\_2017-2018 Chapter Board**.

## **How to Add Members to the Chapter Board Group**

Sometimes, after the new Chapter Board group has been created, a member needs to be added to the group. Here is how to add members to the Chapter Board Group:

**Step 1:** Select **Contacts Tab** on Black Line

**Step 2:** Select **Manage Groups**

**Step 3:** Scroll to **phx\_General Members**

**Step 4:** Select **Contacts**

**Step 5:** Check the box(es) in front of the name(s) to add to the new Chapter Board group.

**Step 6:** Select **Actions**

**Step 7:** Select **Add Contacts to Group**

**Step 8:** Make sure radio button **Add Contact to Existing Group** is selected

**Step 9:** - **Select Group** -

**Step 10:** Select the group to add the member(s) to i.e. **phx\_2017-2018 Chapter Board**.

**Step 11:** Select **View Selected Contacts**.

**Step 12:** If you are sure these are the contacts you want to add, select **Add to Group**.

Note: Members can also be added to the Chapter Board Group by searching for the member's **Contact Record**. Select the **Groups tab** and add the member to the **phx\_2017-2018 Chapter Board** group.

## Method 2 - Create Smart Chapter Board Group for Transition Meeting

If the **Memberships Dashboard** has been updated to include the new Chapter Board members before July 1, a smart Transition Chapter Board Group can be created for a mailing to both old and new Chapter Board members. For the purpose of demonstration Phoenix Chapter is used.

**Step 1:** Select **CiviCRM > Memberships > Dashboard**

**Step 2:** Scroll to **Chapter Board Member** and select blue **Current#** at end of row

**Step 3:** Check arrow in front of **Name** to alphabetize.

**Step 4:** Confirm the new Board members have been added and members going off the Board have not been removed yet.

**Step 5:** Go to **Search > Advanced Search**

**Step 6:** Scroll to the **Memberships tab**

**Step 7:** Select **Membership Type** as **Chapter Board (Phoenix)** or your Chapter.

**Step 8:** Select **Membership Status** as **New** and **Current**

**Step 9:** Select **Search**

**Step 10:** Select radio button **All Records**

**Step 11:** Select **Actions dropdown menu**

**Step 12:** Select **Group – create smart group**

**Step 13:** Fill in the page as follows. **Be sure to select Save Smart Group!**

The screenshot shows the 'Group Settings' window for a smart group named 'phx\_Chapter Board - Current/Transition'. The window title is 'Group Settings: phx\_Chapter Board - Current/Transition'. A green banner at the top states: 'You can edit the Name and Description for this group here. Click [Contacts in this Group](#) to view, add or remove contacts in this group.'

The form fields are as follows:

- Name \***: phx\_Chapter Board - Current/Transition (Smart Group)
- Created By**: Might, Diane
- Modified By**: Might, Diane
- Description**: IMPORTANT: This Chapter BOD Smart Group can be used for mailings to the new and old BOD for the transition mailing or the current BOD depending on the time of year. Use for the BOD transition meeting mailing once the new Chapter BOD memberships are added for the upcoming fiscal year and before those going off the Board have expired. Once those going off the Board expire, this becomes the current Chapter BOD.  
Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.
- Group Type**:  Mailing List
- Visibility \***: User and User Admin Only
- Reserved Group?**:  If reserved, only users with 'administer reserved groups' permission can disable, delete, or change settings for this group. The reserved flag does NOT affect users ability to add or remove contacts from a group.
- Is active?**:
- Parent Groups**: Add Parent - select group -

At the bottom right, there are 'Save' and 'Cancel' buttons.

**Step 14:** Confirm the group is correct by going to Contacts > Manage Groups and scroll to **phx\_Transition Chapter Board Group**.

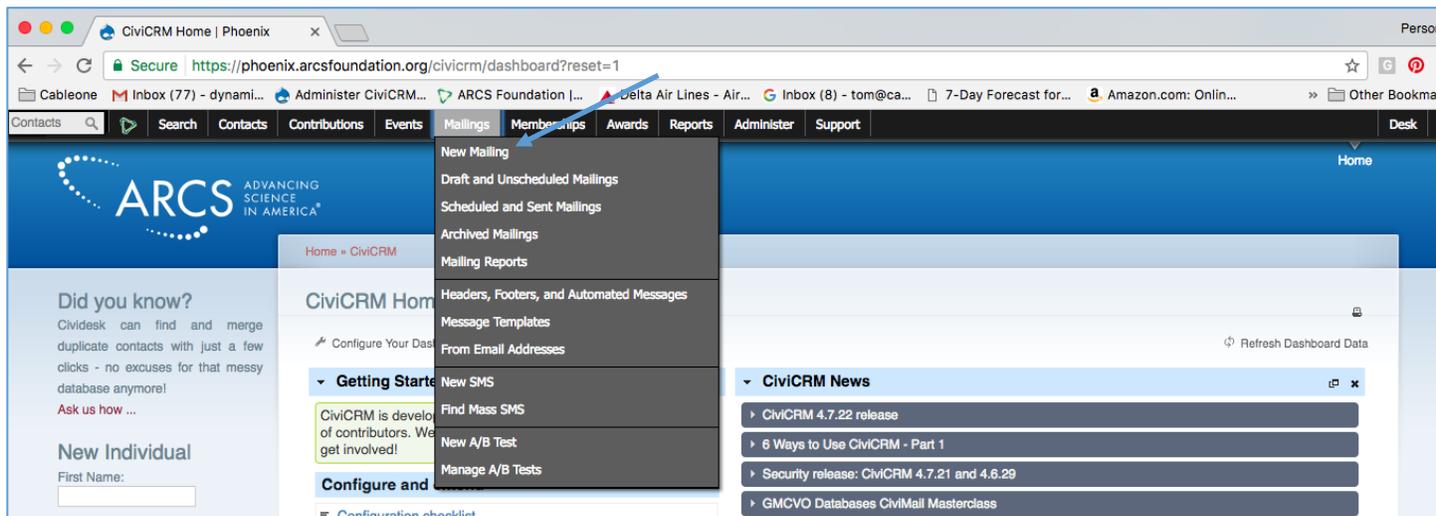
Note: Once the memberships going off the Board are expired; this can be used as the Chapter Board mailing group.

## Create Chapter Board Email for Transition Meeting

Here is how to create the email to send to the Chapter Board Transition Group:

**Step 1: Login**

**Step 2:** Select **Mailings > New Mailings**



**Step 3:** Fill in the following:

- a. **Mailing Name:** Transition Mailing Group (or whatever you like. NOTE: You can reuse this email next year and change the Mailing Name, Subject and Recipients as needed)
- b. **From:** [phoenix@arcsfoundation.org](mailto:phoenix@arcsfoundation.org) or your Chapter email.
- c. **Recipients:** Select recipients. For Method 1 above this would be **phx\_2017-2018 Chapter Board** and **phx\_2016-2017 Chapter Board** (duplicates emails will not be sent). For Method 2 above with the smart group select **phx\_Chapter Board – Current/Transition**.
- d. **Subject:** Transition June Board Meeting Notice (or whatever you like)
- e. **Header and Footer Tab:** For example, in Phoenix select the **Phoenix Mailing with Headers Logo** and **Phoenix Mailing Footer**. If Header and Footer tab is not available for a chapter, contact [is.help@arcsfoundation.org](mailto:is.help@arcsfoundation.org).

**Step 4: Save Draft**

**Step 5:** Come back at any point and work on this email under **Draft and Unscheduled Mailings** to create the body of the email and do a test email to yourself before emailing to the combined Boards.

### After June Transition Meeting Disable or Delete the Previous Year Chapter Board Group

Once you no longer need the previous year group, you may either disable or delete the group depending on Chapter convention. When in doubt, disable.