

CHAPTERBUILDER EXPECTATIONS

The Vice President of Growth and all Recruitment Captains should be added as Team Leaders and have all logged in/made an account.

- Adding a Team Member
 - Step 1: Click on 3x3 grid and then click on the Settings icon
 - Step 2: Click on “TEAM”
 - Step 3: Type in email address and then pick the description
 - Step 4: Click “INVITE USER.” The recipient will receive an email with a link to access ChapterBuilder

All Potential New Members (PNMs) should be added into ChapterBuilder.

- How to Add Single PNM
 - Step 1: Click on the “NEW” tab on the top of the website and select “NEW PNM”
 - Step 2: Fill out PNM information (First Name, Last Name, Email, Phone Number)
 - Step 3: Select “Referral Source” option. Once uploaded, you can type into the search bar on the top left of the website the referral source and it will pull up all the PNMS with that tag.
 - Step 4: Select “STATUS”
 - Step 5: Click “Add Contact”
- How to Add PNMs in Bulk
 - Step 1: Click on the “NEW” tab on the top of the website and select “BULK UPLOADER”
 - Step 2: Fill out PNM information (First Name, Last Name, Email, Phone Number, Referral)
 - Step 3: Click “UPLOAD PNMS” that is located on top left corner of page

PNM's should receive text message communication from VPG regarding recruitment events.

- Setting Up ChapterBuilder Number
 - Step 1: Click the 3x3 Grid icon and then Click the Settings tab (first one)
 - Step 2: Scroll to the bottom of the page and click on the “SETUP NUMBER” tab
 - Step 3: Select a number you want based off the area code and then click save
- How to Message Individual PNM'S
 - Step 1: Locate PNM on the left list and click on their name
 - Step 2: Click on “SMS” which is located directly under photo header
 - Step 3: Type out message and click send
- How to Message Multiple PNM's (Individually)
 - Step 1: Hold “Command” key and click on PNM
 - Step 2: Repeat Step 1 to select multiple PNMS
 - Step 3: Click on “NEW” located at the top in the middle of the page
 - Step 4: Click on “NEW SMS” which is third from the top
 - Step 5: Type out message. “Insert PNM name” so that it automatically changes the name for each recipient
 - Step 6: Review message and click send

- How to Message Multiple PNM's (List)
 - Step 1: Hold "SHIFT" key and click on PNM
 - Step 2: Scroll down to the last PNM you want to select
 - Step 3: Hold "SHIFT" key and click on PNM. Every PNM in between Steps 1-3 will be selected
 - Step 4: Repeat Steps 3-5 from Number 2.
 - Step 5: Send message

Create an Interest Form

- How to create an interest form on ChapterBuilder
 - Step 1: Click the 3x3 grid in the upper right hand corner
 - Step 2: Click "Leads Generator" and then "Forms"
 - Step 3: Scroll down to "Create New Form" and click "Create Form"
 - Step 4: Determine what information you want from the interest form and click "Create Form"

ADDITIONAL RESOURCES

- PhiredUp [Certification](#)
- ChapterBuilder [Login](#)
- [More information](#) on ChapterBuilder
- [How to use](#) ChapterBuilder
- It is recommended that you sign up for a free training with Techni Phi by clicking the orange "Help" icon on the right-hand side and selecting "Schedule a Training". This will ensure that your chapter/provisional chapter is using the software to its fullest potential.
- **Questions:** Contact Director of Expansion & Growth, Mike Carlo, at mcarlo@alphasigmaphi.org.