

CHAPTERBUILDER TRAINING

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 Add PNM

1. 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”

2. Bulk Uploader

- **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

HOW TO MESSAGE PNM'S

1. Single PNM

- **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

2. 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

3. Multiple PNMS(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 Step 1 and Step 3 will be selected
- **Step 4:** Repeat Steps 3-5 from Number 2.
- **Step 5:** Send message

HOW TO CREATE A FORM

- **Step 1:** Click on the 3x3 grid icon at the top of the page
- **Step 2:** Click on the “LEADS GENERATOR” icon
- **Step 3:** Scroll slightly down and click on “CREATE FORM”
- **Step 4:** Title the form and select desired fields
 - This is useful for having PNMS sign up during tabling/Rush Events
- **Step 5:** Click Create Form
- **Step 6:** Click View Form
 - Any PNM who then fills out the form will be directly uploaded into Chapter Builder
 - *If you want to upload an image click “UPLOAD IMAGE” at the top of the page*

HOW TO CREATE A FORM FIELD

- **Step 1:** Click on 3x3 grid and then click on the Settings(Gears) icon
- **Step 2:** Click on “FIELDS” and scroll all the way to the bottom and click “CREATE FIELD”
- **Step 3:** Type in the field you want to create
- **Step 4:** Click “CREATE FIELD”

HOW TO CREATE A TAG

- **Step 1:** Click on 3x3 grid and then click on the Settings(Gears) icon
- **Step 2:** Click on “TAGS” and scroll down and click “CREATE TAG”
- **Step 3:** Title the tag and write a description
- **Step 4:** Click “CREATE TAG”
 - After tag is created you can then select a PNM and write a note and select a tag and it will stay on his feed for the next time you click on him.

ADDING A TEAM MEMBER

- **Step 1:** Click on 3x3 grid and then click on the Settings(Gears) 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

SORTING PNM/FILTERING BY STATUS & TAG (A-E)

- **Step 1:** Click on the 3 bars icon on the top left corner
- **Step 2:** Order by status(Alphabetical, Note count, Referral Source)
- **Step 3:** Change the status of PNMS to reflect how far along they are along in the process
 - Status “D” - needs to be contacted
 - Status “C” - Expressed interest after first contact
 - Status “B” - Mutual interest after meeting with PNM
 - Status “A” – Holding Bid/Needs bid
 - A+ is signed Bid
 - Status “F” – Not Compatible
 - Reserved for PNMS that are not interested/ Aren’t Joining
- **Step 4:** Once Step 3 is completed, you can restrict the PNM’s by Alphabetical status, by following steps 1 and clicking restrict instead of order

VOTING ON MEMBERS USING CHAPTERBUILDER & ALLOWING GENERAL MEMBER ACCESS

- **Step 1:** Follow steps 1 and 2 from the “Adding a Team Member” main point
- **Step 2:** Click on “IMPORT SPREADSHEET TO INVITE USERS” tab and type in every member’s info (primarily email)
- **Step 3:** Once each member receives the email and logs in, they are then able to vote on PNMS.
- **Step 4:** You can then restrict the list of PNM’s by status and each member can then go through and give them a “thumbs up” or a “thumbs down.”
 - When clicking “thumbs down” you will be asked to provide a reason

