Sending an Email through the NAMA Database

1. Once you are logged into the NAMA database, click on Communication at the top left corner of your screen and then select Send Mass Communication.
2. Then click on the word TO in the middle of the page. This will bring up the profile selector.
3. You will then click on the affiliation code tab.
4. Then click on the drop down and select all your chapter's membership types. Do this by clicking on one at a time and then clicking on the double arrow next to the drop down.
5. Once you have selected all of them, then look directly under the drop down and check the box that says ONE. This means the profile/member only needs to have one of these types of memberships.
6. Next click on Preview. This will bring up all the current members that you have selected.
7. If you would like to email everyone, just click next to the first name, hold down the shift key and then scroll down and click next to the last name. If you only want to email a few people, you can just click next to the names you would like to use while holding down the CTRL button.
8. Once you have everyone selected you want to email, click on Select. This will add them to the email.
9. Next, click on the Message tab and add your subject. You can do it in HTML or Text. You can add pictures and links as well. If you right click in the message area it will give you the option to Insert Special Fields. This is just like a mail merge document. For example, if you select the First Name, it will automatically fill in the first name for each recipient.
10. Once you are done with the message, if you would like to add an attachment you just click on the next tab named Attachment.
11. Once you are ready to send the email, click on the Send tab. At the top of the page you will see a box that says Special Field Alternative Values. This is what will be inserted in the field if there is nothing our database for that field. For example, if someone is missing a first name, it would put Valued Friend. You can change any of these fields.
12. You have the option of sending the email right away or schedule it for a later time and day. If you would like to schedule it for later, just click on the box next to Delayed Send and then select the day and time for it to be sent out.
13. Before you send the email, I would suggest sending yourself a test email. You can do this by putting your email in the box and then click the Send Test Email.
14. Once you have received the test email and everything looks fine, you can click send. You must click Send even if you are sending it later.

Viewing Membership Reports

1. To access membership reports, click on Saved Queries at the bottom left corner.
2. There are 4 reports you will want to use.
3. To access the membership roster, go to the query with the name Membership Roster – (Your Chapter Name) and click on Preview. This will pull up the current membership roster.
4. You can use the filter button at the top of any of the columns to filter out certain members.
5. You can also export this report to Excel as a CSV file. To do this, just click on Go and the bottom right corner. Before you can export another report, you will have to close the first one or save it.
6. To go back to the list of queries, click on the Start Over button at the bottom of the page, then click on Use My Saved Queries.
7. The next query you will use is the Expired Members – Filter by Chapter. Scroll down and find the query and then click on Preview.
8. To change the dates for this query, you will need to click on the Advanced tab at the top of the page. The dates can be found in the last line of the SQL. You can change it to any dates that you would like.
9. Once the dates are changed, click on Refresh Preview Data at the bottom of the page.
10. Then you will need to filter out all the chapters except for yours by clicking on the funnel icon on the Chapter column and selecting only your chapter.
11. To export this report, repeat step 5.
12. Repeat step 6 to choose another query
13. The next query will be the New Member – (Your Chapter), scroll down to the query and select Edit Query. You will need to edit the query to change the date range.
14. After you click Edit Query, click Next at the bottom of the page.
15. The next page is where you can change the dates.
16. Once you've selected the dates, click next and then next again.
17. This will bring you to the results page. If you would like to export these results repeat step 5.
18. The last query will be the Upcoming Expirations query. You will want to click Edit Query so you can change the dates.
19. After you select Edit Query, click next at the bottom right of the page. The next page is where you can change the month. The month is based on the month the member will expire.
20. Once you select the month, click next and then next again.
21. You will need to filter out all the other chapters by clicking on the filter button on the Revenue Item Name column.
22. If you would like to export the report repeat step 5.