Temple Shaarei Shalom
Marketing Coordinator's Handbook

Developed By Holly Genser, Marketing Coordinator

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Table of Contents

Bar/Bat Mitzvah Preparation

Confirm Usher and Rehearsal Dates

1. Open File N: Admin/BarBatMitzvahs/August 2013-June 2014 Mitzvah Data/8-2013-6-2014 B'nei Mitzvah Master Sheet

2. Find the Bar/Bat Mitzvahs' two months ahead.

3. E-mail the families with their Bar/Bat Mitzvah rehearsal and usher dates.

4. Call the families e-mailed a week or so later.

5. Make sure you get a confirmation of the dates.

6. Rearrange for those families who cannot make usher dates. Ask others to switch with them.

Flyers and Publicity

Publicity Request Form

- The Publicity Request Form is in the Mail Room and on the Temple website under Committees.

- TSS e-mail update through Constant Contact. See Appendix for username and password.

- Notices on Facebook.

- Calendar press releases during the third week of the month for the next month. Send through e-mail with Press Releases distribution group.

- Press Releases, when needed, are sent to by e-mail to the Press Releases distribution group.

- Publicize major events on www.AmericanTowns.com and www.PBpulse.com. See the usernames and passwords in the Appendix.

Filing Flyers in the N:Admin Drive

- File flyers in the folder for the committee responsible for the event or program.

- File under the correct year and month. Establish a new folder, as needed.

Prepare the TSS Email Update with Chaverware & Outlook

Important: Do steps 1-3 just before opening Chaverware.

Prepare the TSS Email update in MS Word.

1. Save the file.
2. Highlight all contents.
3. Click **Copy.**

Prepare the Email Update in Chaverware.

1. Click **Chaverware** on Desktop.
2. Log into **Chaverware.**
3. Click **Reports** at the top of the first screen.
4. Click **Queries** in the drop-down menu that appears.
5. Select **← Queries** at far right.
6. Click **All members for A-F New.**
7. Click **→View Results** at far right.
8. Click the arrow at the top.

← Queries and
→ View Results buttons

Use each of these
All Members for
Email by A to F, F
to I, etc.
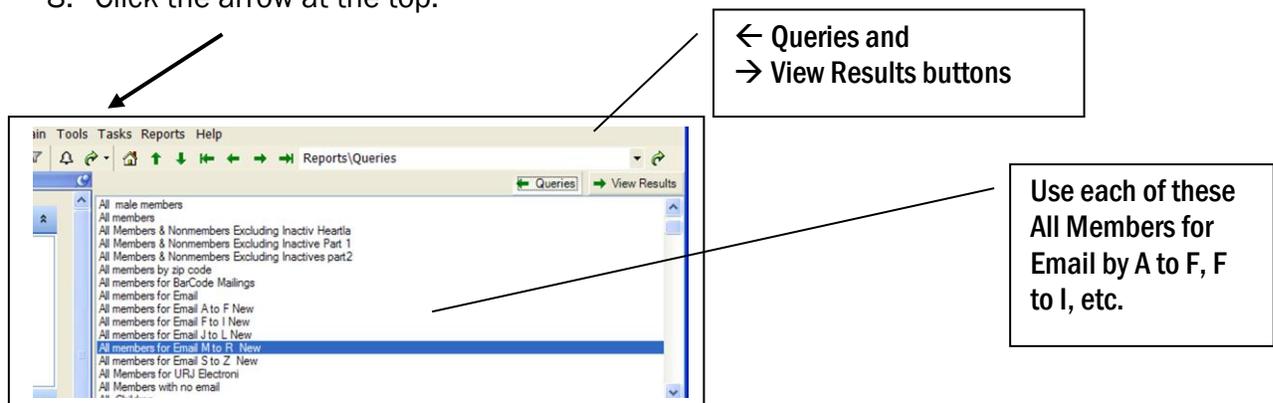
9. Select **Email.**
10. Type the Subject: **TSS Email Update.**
11. Note that BCC is checked on everyone.
12. Click **No** on the next two dialog boxes.
13. When you see a list of people, and click **OK.**
14. Type your email into the **To:** line.
15. **Paste** the contents into the body of the email. (The email partially disappears behind a dialog box. Click **Paste** anyway.)
16. Add any flyers you need to attach. (Admin/News&Views/[Year]/[Month]/Flyers).

17. Make sure all the flyers are there. If not, check an earlier issue.

18. Click **Send.**

19. **Repeat steps 8-18 four more times,** once for each alphabetical section of the congregation (F-I, etc.)

See Appendix 2 for a sample TSS Update

Calendar Press Releases

Calendar Press Releases are emails of services and events sent to the Public Relations list in Outlook.

1. Create the Calendar Press Release in an email as shown in Appendix 2: Sample Calendar Press Release.

2. Proofread.

3. Email it to the Temple Administrator for review and approval.

4. When approved, type the temple website into the **From** line.

5. Type press release into the **BB** line and click **Enter.** The Press Release distribution list will appear underlined.

6. Click **Send** when it's all ready.

Press Releases

NOTE: Press releases are only used for major events to which the public is invited.

Instructions from the Co-VP of Planning & Development

Format On letterhead:

Line 1) Contact info always goes on the top RIGHT

Line 2) FOR IMMEDIATE RELEASE -- goes on the top LEFT in BOLD with the DATE

Line 3) Titles of Press Releases should be kept to two lines, maximum; BOLD, all capital letters, 18pt size font

Line 4) (If this is an event like the Purim Dinner, put the Day, Date and Time Centered in BOLD -- separate by bullets)

Ex: (Saturday, March 3 * 7:00 p.m.) -- (Notice no "rd" on 3rd -- just the number; this is AP Style*)

Line 5) For the text, indent first paragraph with location (Boynton Beach, FL --) then start copy: Temple Shaarei Shalom is excited to announce...

Line 5) Your last paragraph is called the "boiler plate" this is the "brag paragraph about Temple Shaarei Shalom who we are; what we do, etc"; then end with the website address "Visit us at www.templeshaareishalom.com.

These are the industry standard formats for press releases and calendar releases. The Associated Press Style Manual (AP Style*) is the journalist's bible, and these formats are recognized in newsrooms across the country.

Spacing: Press releases should be visually appealing and easy to read. Press releases can be single or double spaced; with a line of space in between paragraphs.

Finally, Press releases should always be kept to a single 8-1/2 x 11 page. Editors cringe when they 2-3 page press releases!

Create a Submittable Adobe Form

A. **Create the form text and fields in MS Word.**

- Create the form with lines or tables for fields.

- Think about places you might want to use special fields, like a date picker, check boxes, and multiple-choice check boxes. Allow two full spaces for the form fields.

- You can set up fields to calculate totals based on contents of other fields in the Format dialog box.

- Adobe only recognizes fields in certain formats. Here are the three ways Adobe recognizes fields. See the options below.

Diagram 4. Three Options for setting up fields in MS Word to convert to an Adobe form

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Option 1: Before the field.

Adult1 First Name _____ Adult1 Last Name _____

Adult2 First Name _____ Adult2 Last Name _____

Option 2: Place words *above the box* where the entries will be, double spacing below to allow enough space for the form to convert.

Adult 1 First Name   Adult1 Last Name

_____   _____

Option 3: Use a table. Adobe will add to each empty cell to create a discrete variable name. For example, fields in the Name column below, the fields would be called NameRow1, Name Row2, NameRow3. In the Age column, the fields would be called AgeRow1, AgeRow2, AgeRow3.

Name	Age	Member ?(yes/no)

Warning: Do not place field names under the field. All field names will be incorrect and need to be changed in Adobe Acrobat Pro.

B. Set up the form in Adobe Acrobat X Pro.

1. Open Adobe Acrobat X Pro.

2. Click **Create.**

3. Select **PDF or Online Form**.

4. Select **Use an existing form.**

5. Click **Next.**

6. Click **Browse** and fin the form's MS Word file you created.

7. Click **Next.** Adobe will convert the file to a form.

8. Right click on any field and select **Properties** dialog box.

9. Keeping the **Properties** dialog box open:

   a. Edit the form fields, making sure the names are correct.

   b. Insert any check boxes or drop-down menus.

   c. Select specific fields and set them as dates, numbers, numbers with decimals and $, etc.

   d. Select fields that are required, and click the **Required** box.

   e. Right click on any field and select **Select All.**

   f. Click the **Appearance** tab.

   g. Change Text font to **Helevetica or Times, as desired**.

   h. Change size to **10**.

10. Select the checkboxes, and change all their font sizes to **10** as well.

11. You can add **calculate** totals with sums or multiplications with the **Calculate** tab in the **Properties** Dialog box.

C. Add a Submit Button to the form.

1. Click the **OK** icon shown below to add a button.
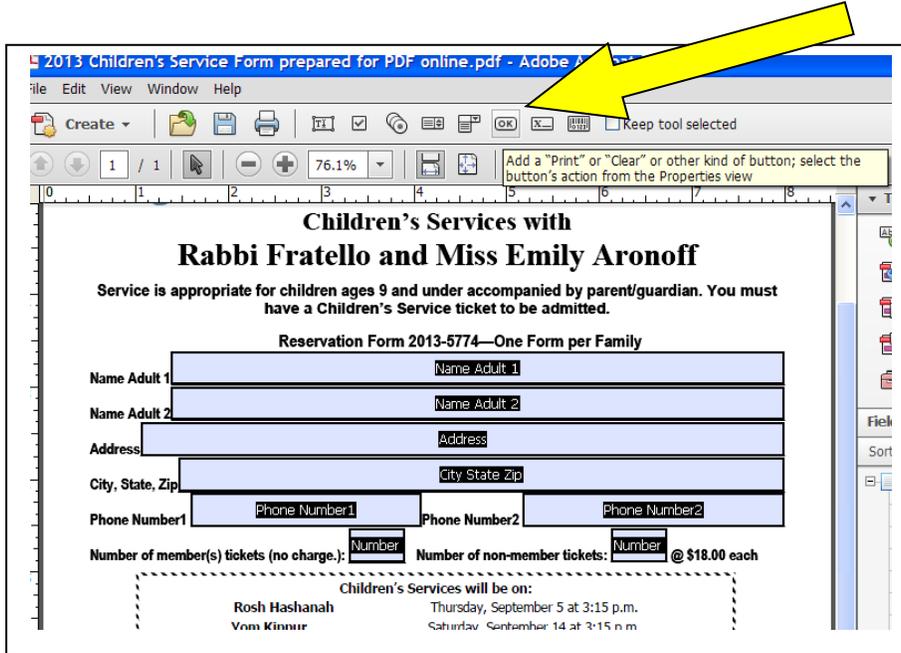
2. Place the button where you want it.

3. Double click the button to open the **button dialog box**.

4. Click the **Options** tab.

5. Complete the information as shown below.
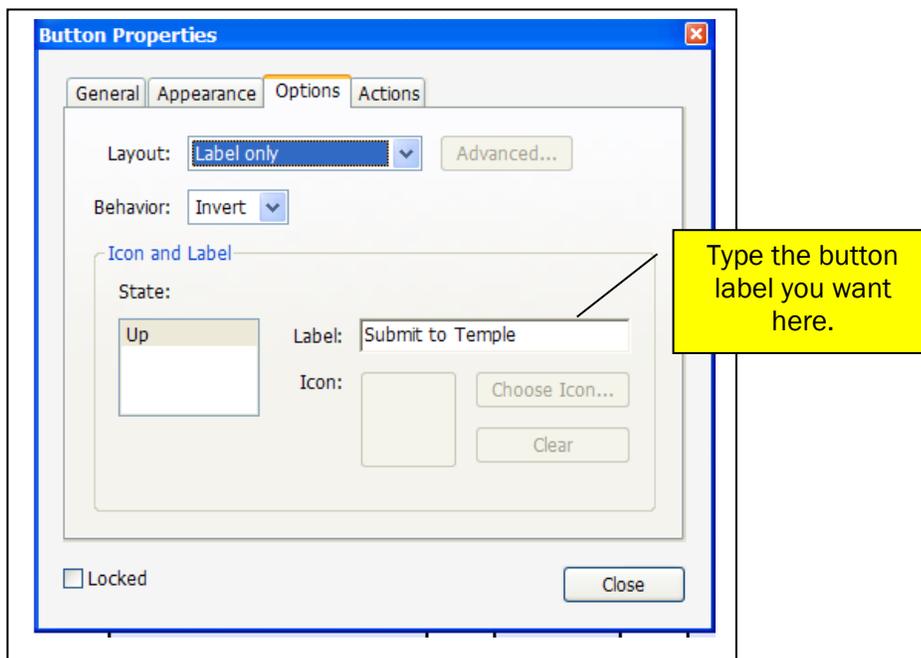
6. Click the **Actions** tab.

7. Select **Submit a form.** You'll need to scroll all the way down to the end of the list.

8. Click **Add.**
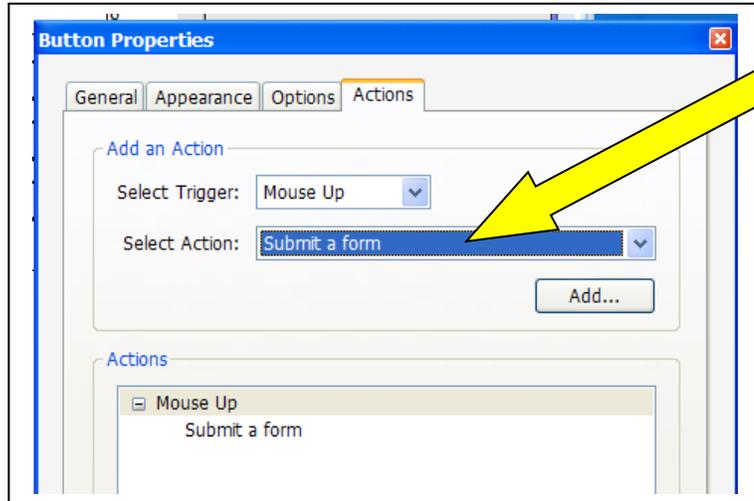
9. In **Enter a URL for this Link,** type:

'███████████████████████████████m' or
'`mailto:[thedesiredemailaddress]`.

10. Select **Export Format: PDF The complete document.**

11. Click **OK.**

Type: **mailto**████████ ████████ or appropriate email address

Select **PDF The complete document.**

Click **OK.**
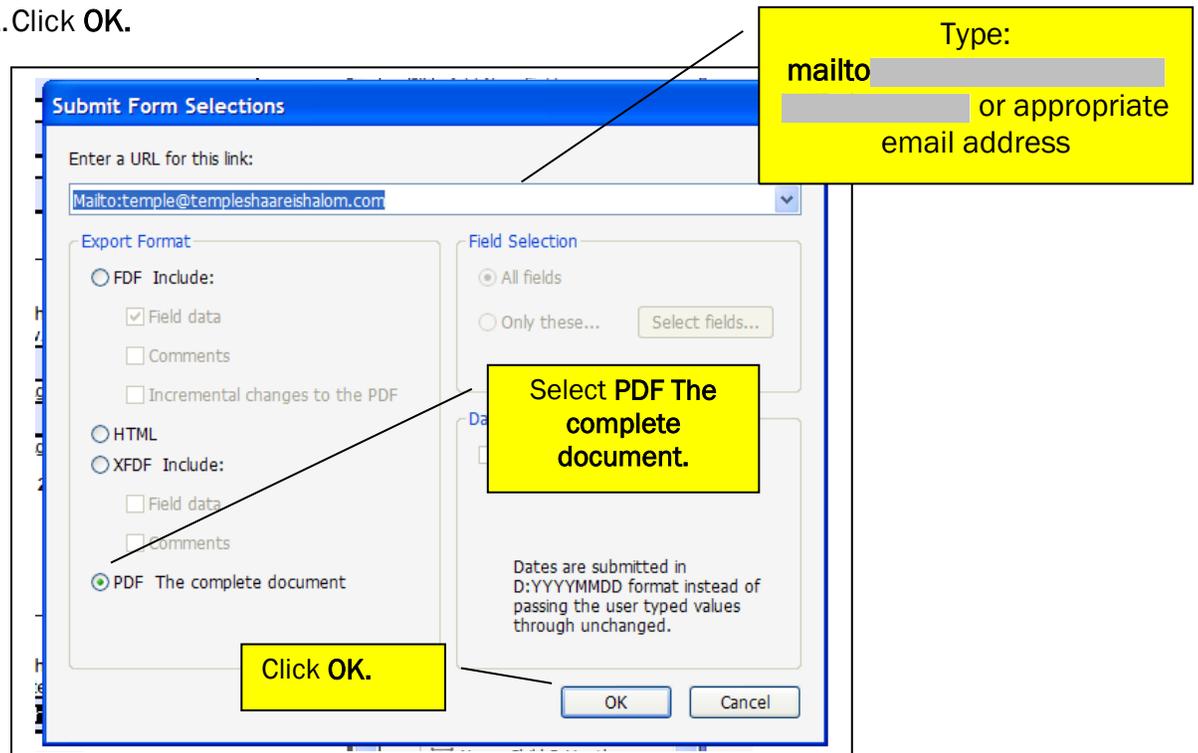
12. Click **Preview** at the top of the form to check the form and the button. You can click the button and make sure the email pops up with the attached form and correct email.

13. To edit the form, click **Edit** at the top of the form to continue.

NOTE: If you have to come back into a saved form, open it in Adobe Acrobat X Pro, click **Tools,** and click **Edit.**

There are other options as well, such as emailing only the field results. You can see all options at http://help.adobe.com/en_US/acrobat/X/pro/using/WS58a04a822e3e50102b d615109794195ff-7dd6.w.html

Revise the Text in an Existing Adobe Form

1. Open Adobe Acrobat X Pro.

2. Click **File**, and select **Open.**

3. Select the $\mathbf{T}$ at the top to edit the text.

4. Locate and open the file you want to revise.

5. Change any *text* on the form.

6. Save the file with a new name, if needed, such as year change.

NOTE: You will need to delete the old form from the website and upload the new form.

Revise the Fields in an Existing Adobe Form

1. Open Adobe Acrobat X Pro.

2. Click **File**, and select **Open.**

3. Locate and open the file you want to revise.

4. Click **Tools** on the bar at the top of the file.

5. Click **Edit.**

6. Change any *fields* on the form.

7. Save the file.

NOTE: You will need to delete the old form from the website and upload the new form.

Update the Temple Website

Log into the Temple Website

1. Open Internet Explorer.
2. Click Favorites.
3. Click Temple Shaarei Shalom.
4. Click Log In at the far right.
5. Enter username and password.

Add and Delete Temple Documents on Website

Add a Document

1. Log into Temple website.
2. Click on **Temple Documents** on the Home Page.
3. Click on the **Category** needed at the right (For, example: Publicity)
4. Click **Add an Item**.
5. Name the document.
6. Browse and upload the document.

Delete a Document

1. Log into Temple website.
2. Click on **Temple Documents** on the Home Page.
3. Click on the **Category** needed at the right (For, example: Publicity)
4. Click on **Edit, or Delete Items**
5. Click **Delete**. (Note: the document attachment

Add Flyers to Website Calendar of Events

1. Log into website.
2. Click **Admin** tab on the right.
3. Scroll down to **Edit Features**.
4. Scroll to and click **Edit Events.**
5. Scroll to year needed.
6. Scroll to month needed.
7. Click on the desired event or date.
8. Click **Edit.**

9. Click the **Browse** button.

10. Find the flyer for the event and click on it.

11. Click **Open.**

12. Click **Save Changes** at the bottom of the page.

13. Repeat steps 5-11 for all the events for which you need to add flyers.

14. Exit.

Change Events and Flyers in Website

A. Go to Area for Changing Events and Flyers

1. Click **Upcoming Events.**

2. Click **Event Flyers.**

3. Scroll down and click on <u>**Click Here to Add, Delete, Edit Items Under Event Flyers.**</u>

B. Delete an Old Flyer

1. Click on an old flyer.

2. Click **Delete.**

3. Repeat 4 and 5 as needed to delete out-dated flyers.

C. Add New Flyers for Upcoming Events

1. Click **Add.**

2. Type in the event title, date and time at the top of the form.

3. Browse to find the flyer to upload.

4. Click on the flyer.

5. Click **Open.**

6. Type the title in the **Meta Title** field.

Change the Marquee Text on Home Page

(Moving Events List; See the diagram on the next page)

1. Write new events list in MS Word, formatted as you wish.

2. Highlight the text.

3. Click **Copy.**

4. Save document, if you wish.

5. Log into TSS website.

6. Click **Admin** tab.

7. Slide down to **Feature Descriptions**.

8. Left click **Feature Descriptions.**

9. Slide down to **Public Home Page.**

10. Click Edit.

11. Click and highlight the black text you want to change. A gray box appears around the events list.

12. Click icon at top for Insert from Word. (mouse over to find title)

13. Text appears in the gray box. Make sure it's okay.

Change Home Page Information outside the Marquee

(See the diagram on the next page)

If any information below the gray box need to be deleted:

1. Click and highlight.

2. Click **Delete.**

3. If any new links are needed, then type in the title of the event (not in the gray box).

4. Highlight the text.

5. Click **Hyperlink** icon in the top row. (looks like a link in a chain)

6. Click **Browse.**

7. Click **Upload Files.**

8. Find your file.

9. Click **OK.**

10. Follow any other directions there, close boxes.—I haven't done this.

11. Scroll to bottom of the screen.

12. Click **Save.**

Change Private Home Page Marquee Text

Follow the directions for Public Home Page Marquee Text, except in number 9, choose Private Home Page.

Diagram 1. Editing Marquee Text.

Click to insert text from MS Word

Hyperlink icon with unlink icon next to it.

Click and highlight text to change.

Follow the directions to change.

Separately, highlight and delete any links for expired programs outside the marquee box, when expired.

Mailings and Emails in Chaverware

Print a Form Letter and Envelopes with Chaverware

Example: Bar/Bat Mitzvah Letters

A. Print the Letter

1. Complete the letter to fit on Temple letterhead.
2. Log into Chaverware.
3. Click **Reports**.
4. Select **Queries**.
5. Scroll to **Bar/Bat Mitzvah Dates**.
6. Enter the earliest date under "date greater than or equal to". Note: May have to wait.
7. Enter the latest date under "less than or equal to".
8. View **Results.**
9. Click **Yes** to save changes.
10. Click the arrow to **Go To Word**.
11. Click **Edit Existing Form Letter**.
12. Click the magnifying glass to search for your file. (Example: a Mitzvah Brick & Leaf Letter)
13. Click on the item.
14. Click **Edit**.
15. Click **Next**.
16. Click **Yes** on "Open Command?"
17. Click **Options.**
18. Click **Remove all Merge Information**.
19. Click on the new MS Word file.
20. Save the file.
21. Put letterhead in the printer face down with the logo toward the front.
22. Print.

B. Print the Envelopes Using the Same Chaverware Report Generated Above

1. Click the arrow to **Send to**.

2. Select **MS Word.**

3. Click Magnifier to search and open the file **N:/Admin/Forms/ENVELOPES SIZE TEN For Family Merge**.

4. Click **Open.**

5. Click **Next.**

6. Click **Merge.**

7. Save the file with the current title and date in the proper folder.

8. Place envelopes face up in the auxiliary print tray.

9. Click **Print**.

Other Chaverware Tasks

Look Up an Individual's Contact Information in Chaverware

1. Click **Chaverware** icon on the Desktop.

2. Log into **Chaverware.**

3. Click **Individuals.**

4. Click **Families.**

5. Enter name in tan area under...

6. Press **Enter.**

7. Double click on the person's name.

Create an Excel Spreadsheet with Chaverware Content

Confirmation List

1. Click **Categories.**

2. Click **Category Types.**

3. Click **Class.** (Grades are the first number).

4. Scroll down to grade 10 and year: 10-2012-2013.

5. Click **Edit Layouts.**

6. Highlight each field *not* needed and click **Add.**

7. Repeat number 6 as needed to remove unnecessary fields.

8. Click **Send to** (arrow) and click **Excel.**

12.Click Layout, select Convert to Text (far right).

13.Select file type as Text (Other) and tap the space bar once (separates first and last names with one space).

14.Save.

15.Copy and paste the names into the Birthdays text box and adjust as needed.

B. Create the Anniversary List from Chaverware

Repeat steps from Birthdays, but use the **Anniversary Query**.

Create Mailing Labels

1. Click **Reports.**
2. Select **Pre-defined.**
3. Select **Labels.**
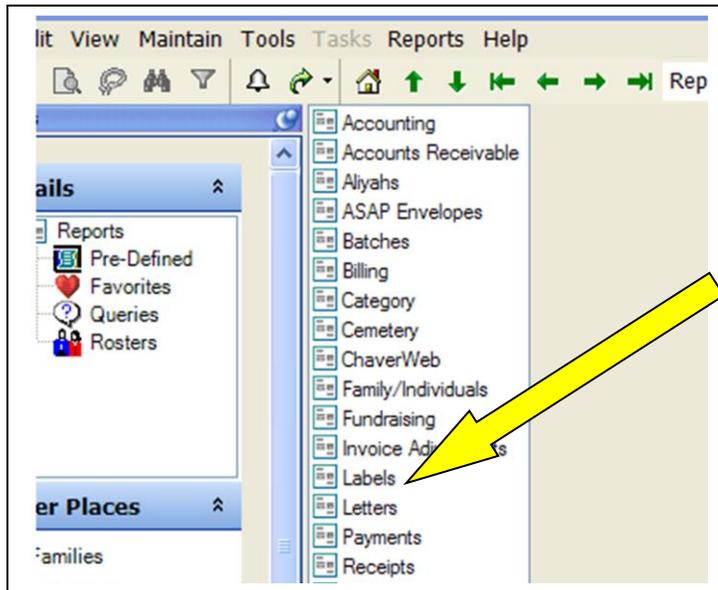
4. Select **For Families.**
5. Select Members Status: **Members** (for a mailing only to members).
6. Select Report Option: **Sorted by Last Name** (for regular mailing) **or Sorted by Zip Code** (for Bulk Mailing). Check with Linda.
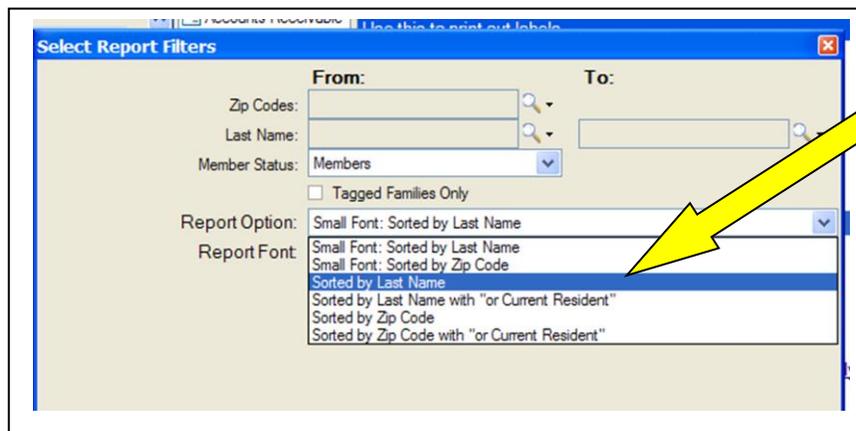
7. Place label sheets in the printer upside down.
8. Click **Preview** and check. Click **Print.**

Send E-mails with Constant Contact

1. Create your E-mail in **Outlook.** It will transfer better to Constant Contact's e-mail.

2. Log in to **Constant Contact's** website.

3. Click **Email**.

4. Click on the title of the last TSS update sent or similar email sent.

5. Click the **Copy** button on the right.

6. Click in the header field and change the subject. **Save.**

7. Click in title field to change it as needed, particularly the date. Click **Save.**

8. Click in the body.

9. Revise the text in the body. OR, if the text is new altogether, highlight all the text that changes and press **Delete** to clear the text.

10. Click inside the body and paste in the new text.

11. Adjust the formatting as needed. Bullets don't work well for large items. Double space between detailed events and bold the name of the event instead. You can do this in MS Word before copying and pasting.

12. Click the gold **Save** button on the top right.

13. Click the brown **Preview** button to see a preview.

14. **Important: Send a test e-mail to yourself** by entering the email on the top left and click send.

15. Make any necessary corrections and save and preview again as needed.

16. Click the gold **Continue** button on the top right.

17. Click the boxes by the people being e-mailed.

For example, TSS Email updates can go to All Members and Friends of TSS. Member tickets can be sent just to All Members. Nonmember ticket mailings can go to the Friends list.

18. Follow the directions to **Schedule** the e-mail now.

19. Select the group list(s) you want to send to. Normal updates go to **All Temple Members, Friends of Temple Shaarei Shalom**, and **Temple Staff**.

20. Log in to check open rate.

Update the Constant Contact Lists from Chaverware

Add New Members from Chaverware to Constant Contact

1. Log into Chaverware.
2. Click Reports.
3. Click Queries.
4. Query new members between last update and today.
5. Click View.
6. Click Yes to Save
7. Click arrow Send to.
8. Select Constant Contact. Username and password are already there, or you can enter. Information automatically uploaded to Constant Contact.
9. Select No DO NOT CLEAR.
10. Click Finish. (the download is immediate)
11. Repeat 3-7 for non-members, if Linda approves.

Adding Non-Member Names into Constant Contact

- Names for list at door at services or at the office can be added to Constant Contact by typing into Constant Contact in the space provided on the ConstantContact.com website.

- You can also upload an EXCEL spreadsheet of e-mails and names, in that order.

- Names will automatically be added to the Friends of Temple Shaarei Shalom Constant Contact list through the Add to Email link on the Temple Website.

The Postage Machine

Options

- Postage for individual up to bulk mailings

- Print with seal or without

- Just seal

To turn on machine

Enter 4 digit password. See [Appendix 1.](#)

To seal envelopes without printing

1. Menu button
2. Select Printing Options
3. Select No Printing (Seal Only)
4. Load and press green Start button

To change postage date

1. Menu button
2. Select Printing Options
3. Select Set or Advance Date
4. Select preferred option (Ex. Advance one day)
5. Load and press green Start button

To select sealed or unsealed regardless of postage

Switch slide tab showing sealed envelope or unsealed envelope

To print postage tapes

1. Enter information
2. Select Tape button
3. Enter desired number of tapes [NOTE: Make this HALF of what you need and then manually turn the printed tapes upside down and reinsert, so that we use both sides, then repeat for the other half]

    Example:

    1. If you need 10 tapes, then enter 5.
    2. After those 5 print, take them and rotate them so that the printed half is on top.
    3. Then print the other 5, so you end up with 5 tape labels, each with 2 tapes).

Appendix 1: Marketing Coordinator Passcodes

Item	How to Access	Username or Code	Password
Adobe Forms Central			
Americantowns.com (Publicity)			
Computer			
Chaverware			
Email			
Parish Data			
Phone Voice Mail			
Pbpulse.com (Publicity)			
Postage Meter			
Ricoh Copier			
Shutterstock.com (photos)			
Website			

Note: Passcodes removed for excerpt

Appendix 2: Sample Calendar Press Release

Sample Calendar Press Release removed to eliminate personal information.

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