

GrowthZone Communications - The Basics



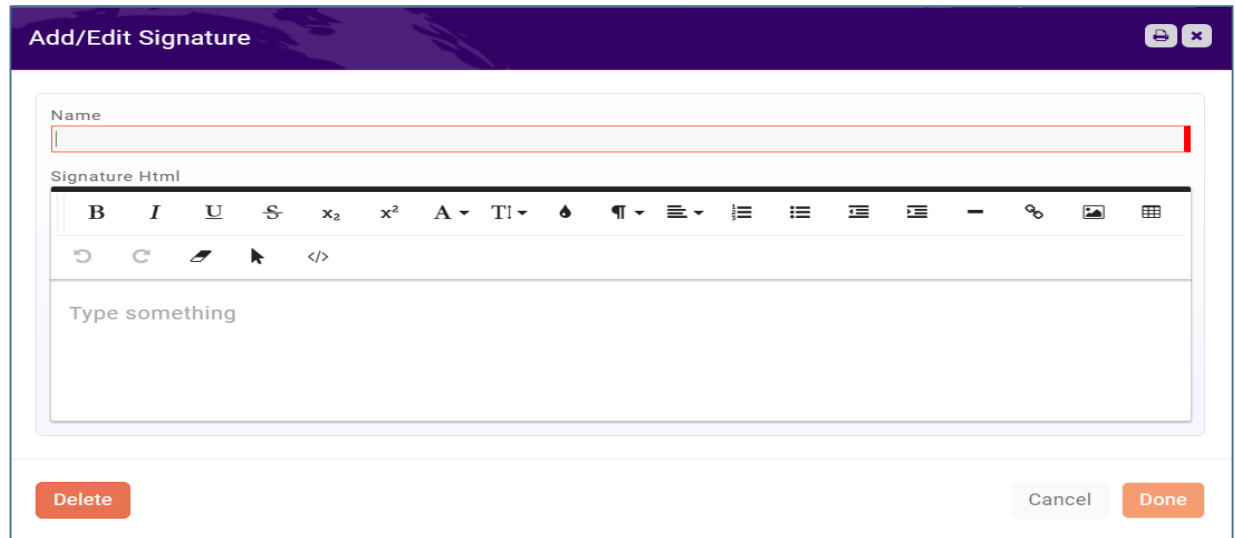
Agenda

- Setting up Communications
- Automated Communications
- Sending/Scheduling Emails
- Logging Calls & Notes
- List/Committees
- Reviewing Communications

Setting Up Communications

Creating your signature will save time when sending email correspondence. You can design your signature with both text & graphics, and easily select it when sending email correspondence.

WIKI: [Create your Signature](#)



The screenshot shows a dialog box titled "Add/Edit Signature" with a dark purple header. It contains a "Name" text input field at the top. Below it is a "Signature Html" section with a rich text editor toolbar. The toolbar includes icons for bold (B), italic (I), underline (U), strikethrough (ABC), subscript (x₂), superscript (x²), font color (A), text color (T), background color (d), text alignment (left, center, right, justified), list creation (bulleted, numbered), link (chain), unlink (chain with slash), insert image (img), and table (grid). Below the toolbar is a text area with the placeholder text "Type something". At the bottom of the dialog, there are three buttons: "Delete" (orange), "Cancel" (grey), and "Done" (orange).

Communication Categories

Communication Categories provide a way for you to organize and filter email communications. Reports such as the **Communication Report** can be filtered by category to allow you to get a better understanding of the communications that are being sent

WIKI: [Configure Communication Categories](#)



The screenshot shows a web interface for managing communication categories. At the top right, there is an orange 'Add' button with a plus icon. Below it is a table with the following structure:

Name	Color	Actions
Initial contact		<input type="checkbox"/>
Member Welcome		<input type="checkbox"/>
Prospect		<input type="checkbox"/>
Events		<input type="checkbox"/>

Email templates provide an easy way to respond to standard email tasks.








- For example, you may wish to send a standard thank you email to all those who have attended an event.
- Email templates may also include database fields. For example, when sending an email for an event, the Event Name database field may be included in the email to customize the email to a specific event.

WIKI: [Create and Manage Email Templates](#)

View/Create Templates

Setup > Communications > Email Templates

Search... + Add

Name	Type	Actions
Auto Payment Receipt	Billing Finance	
Billing Finance	Billing Finance	
Online Payment Receipt	Billing Finance	
ScheduledBillingResultsTemplate	Billing Finance	
Stripe Charge Failed	Billing Finance	
Board Committee	Board Committee	
Chapter Sub-Organization	Chapter Suborganization	

Automated Communications

Automatic messages may be configured to be sent in response to certain actions

WIKI: [Automated Messaging](#)

Automated Communication

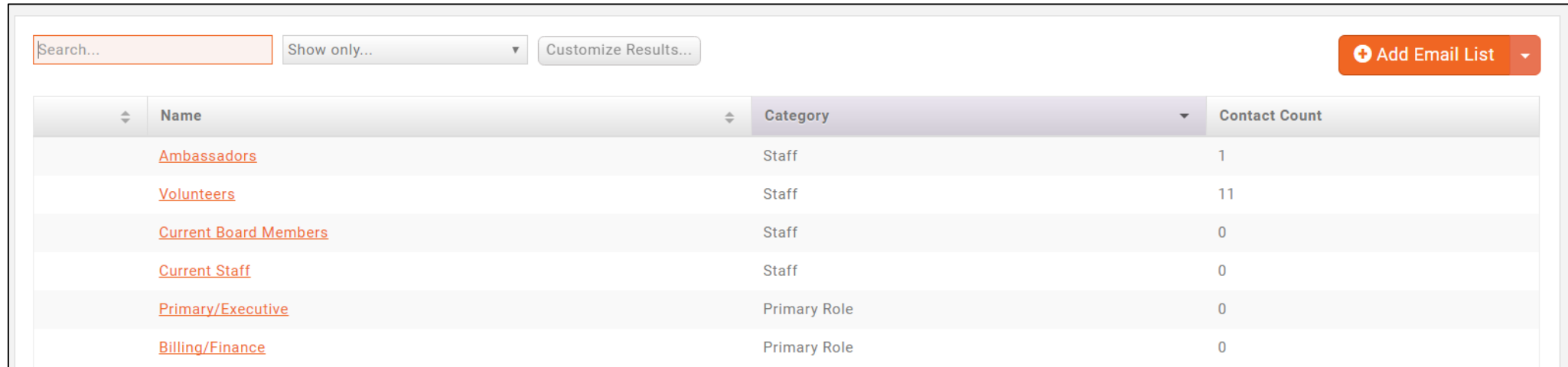
Save

Event	Template To Send
New First Time Tenant	New Account Activation +
New Tenant	New Account Activation +
New Staff Login	New Staff Invite +
New Imported Contacts	New Contacts Created +
New Staff Added	New Staff Added +
New Member Application	Membership Application Confirmation Email +

Lists/Committees

The Lists/Committees module makes it easy to connect with and organize your members and individuals into groups for different types of communication

WIKI: [Working with Lists/Committees](#)



The screenshot shows a web interface for managing lists and committees. At the top, there is a search bar with the placeholder text "Search...", a dropdown menu labeled "Show only...", and a button labeled "Customize Results...". On the right side, there is an orange button with a plus sign and the text "Add Email List". Below these elements is a table with the following columns: "Name", "Category", and "Contact Count". The table contains six rows of data, each with a red underlined link in the "Name" column.

Name	Category	Contact Count
Ambassadors	Staff	1
Volunteers	Staff	11
Current Board Members	Staff	0
Current Staff	Staff	0
Primary/Executive	Primary Role	0
Billing/Finance	Primary Role	0

Add List/Committee

Add/Edit Email List 🔍 ✕

Name: Category: + Established On:

Description:

Display Options

Is Active: Public Can Join: Users Can Join:

Synchronize Contacts with authorized third party newsletter solution:

Manage List/Committee

WIKI: Managing Lists/Committees

Volunteers

General | **Contacts** | Communication | Events | Files

Name: Category: + Established On: Save Actions

Description:

Sponsor: Meeting Time Description:

Default Term (Months):

Display Options

Is Active <input checked="" type="checkbox"/>	Public Allowed to View List <input checked="" type="checkbox"/>	Users Allowed to View List <input checked="" type="checkbox"/>
Disallow Opt Out <input type="checkbox"/>	Public Can Join <input checked="" type="checkbox"/>	Users Can Join <input checked="" type="checkbox"/>
Only Contacts on List can view other Contacts <input type="checkbox"/>	Synchronize Contacts with authorized third party newsletter solution <input type="checkbox"/>	

Sending Emails















Setup > Communications > Email Settings

- Archive Email Address (MemberZone vs. Outlook)
- Unsubscribe Settings

Archive Email Address	archive@membermanagementtraining.growthzoneapp.com
-----------------------	--

Unsubscribe Settings

Unsubscribe Message

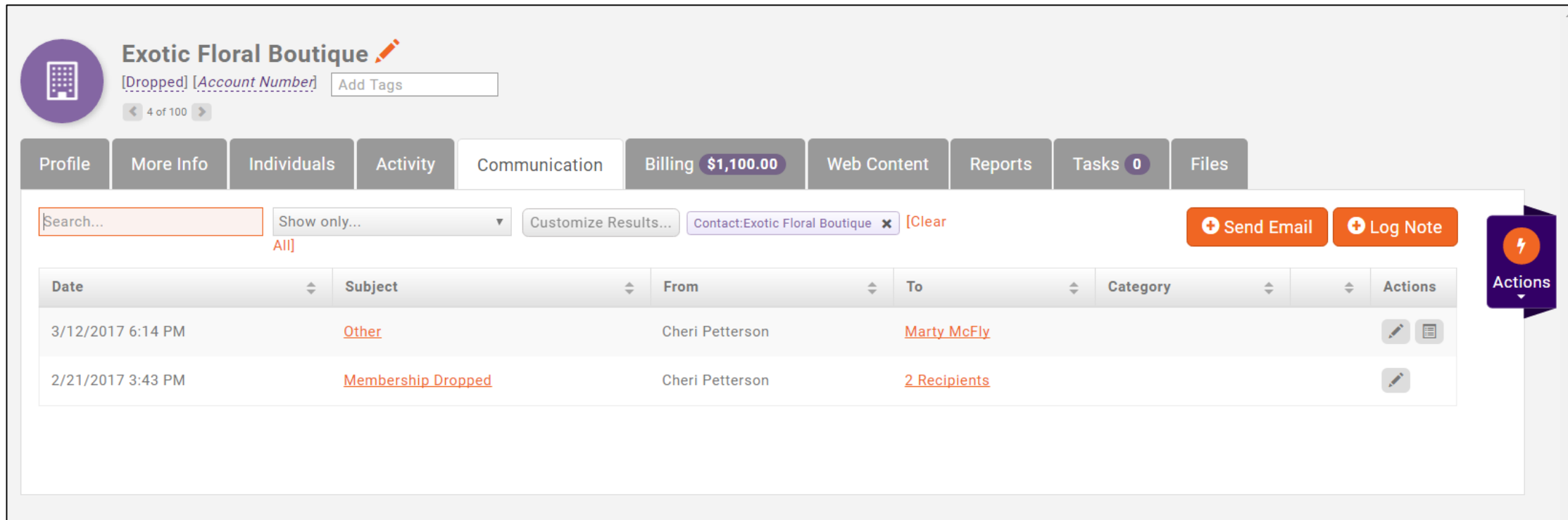
B *I* U ~~S~~ x_2 x^2 **A** **T1**              

This email was sent on behalf of **{{ TCDisplayName }}** located at **{{ TCADDRAddress1 }}**, **{{ TCADDRAddress2 }}**, **{{ TCADDRCity }}**, **{{ TCADDRStateProvince }}** **{{ TCADDRPostalCode }}**. [To unsubscribe click here.](#) If you have questions or comments concerning this email contact **{{ TCDisplayName }}** at **{{ TCEmailAddress }}**.




- WIKI: [Email Settings](#)

Sending Emails/Monitoring Communications

WIKI: [Sending Emails](#)



The screenshot shows the communication interface for 'Exotic Floral Boutique'. At the top, there is a profile icon, the name 'Exotic Floral Boutique', and a status '[Dropped]'. Below this is a search bar with 'Add Tags' and a pagination indicator '4 of 100'. A navigation bar contains tabs for Profile, More Info, Individuals, Activity, Communication (selected), Billing (\$1,100.00), Web Content, Reports, Tasks (0), and Files. Below the navigation bar is a search bar with 'Search...', a 'Show only...' dropdown, 'Customize Results...', and a filter 'Contact: Exotic Floral Boutique'. To the right are 'Send Email' and 'Log Note' buttons. Below this is a table of communications with columns for Date, Subject, From, To, Category, and Actions.

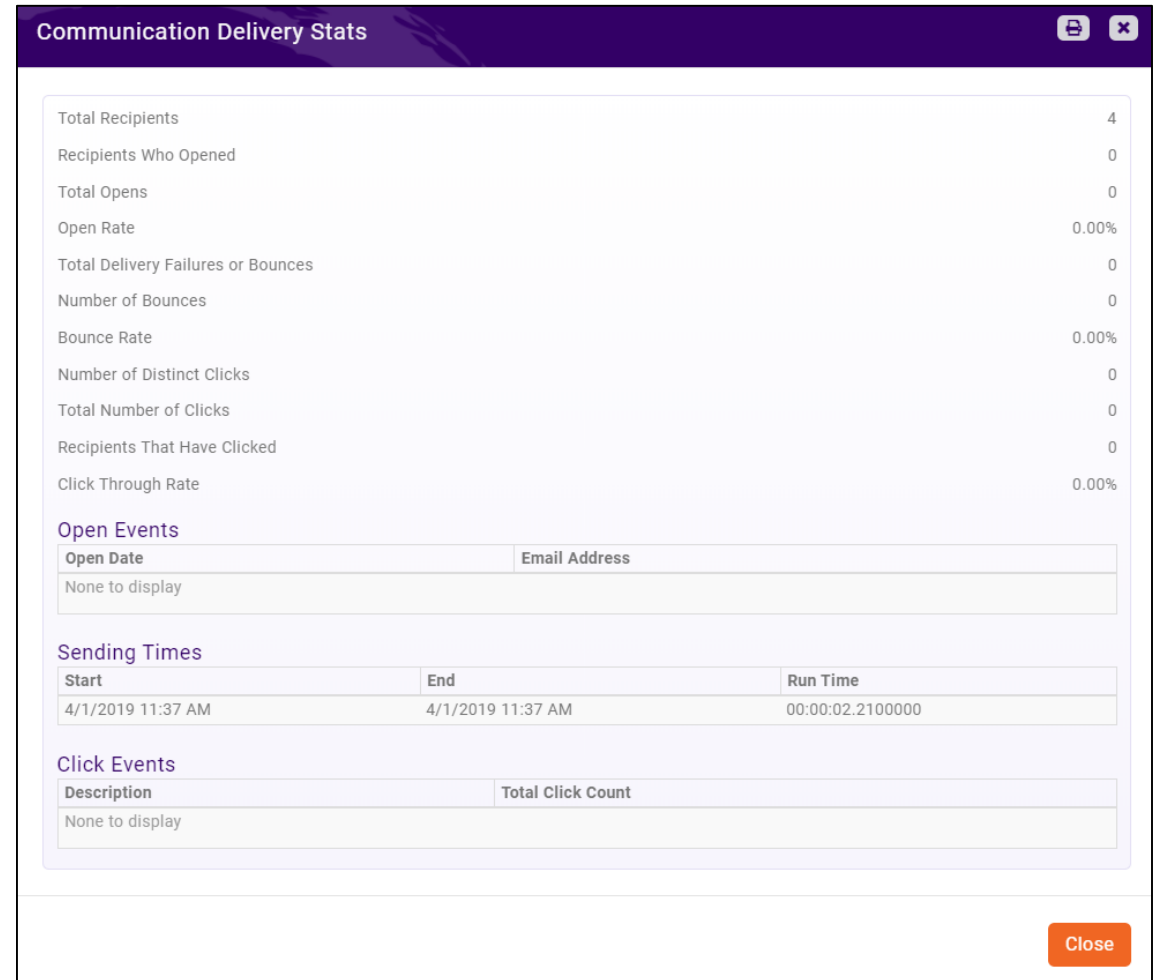
Date	Subject	From	To	Category	Actions
3/12/2017 6:14 PM	Other	Cheri Petterson	Marty McFly		 
2/21/2017 3:43 PM	Membership Dropped	Cheri Petterson	2 Recipients		

Sending Emails/Monitoring Communications

The **Communication Delivery Stats** will help you understand the effectiveness of your communications

This will allow you to gauge the success by looking at open rates, and allows you to check to see whether an individual recipient received/opened the message

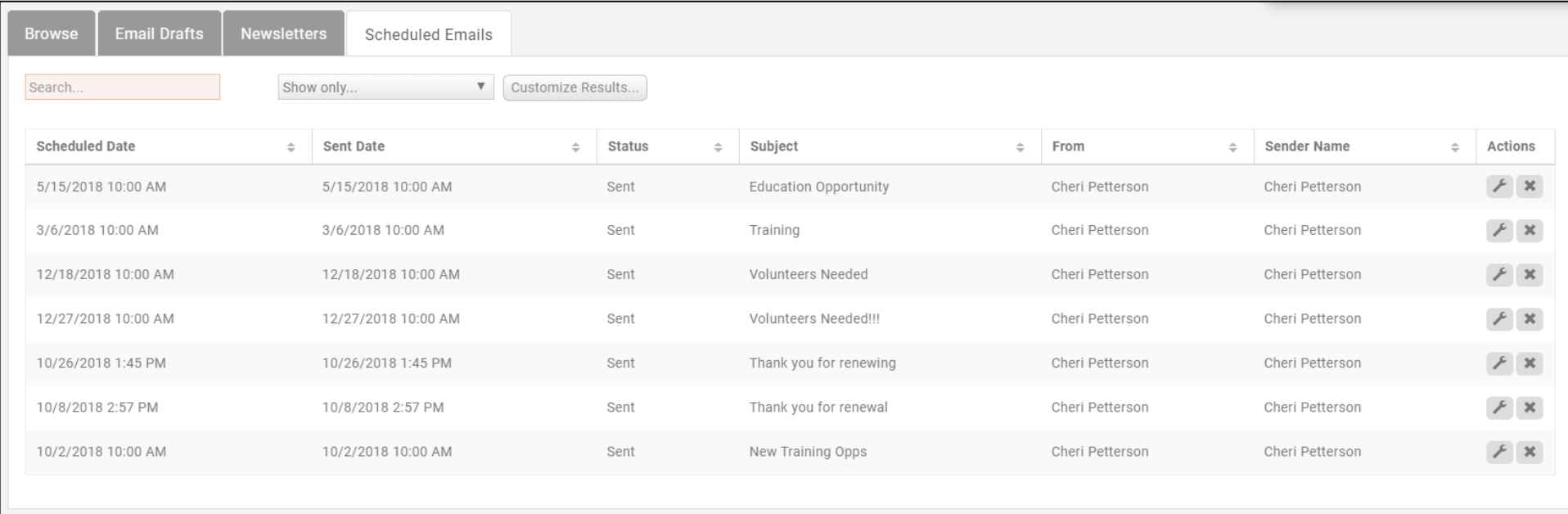
WIKI: [View Email Delivery Statistics](#)

















Scheduled Emails

On the **Communications** module **Scheduled Emails** tab, you can view, edit and delete scheduled emails

WIKI: [View/Edit/Delete Scheduled Emails](#)



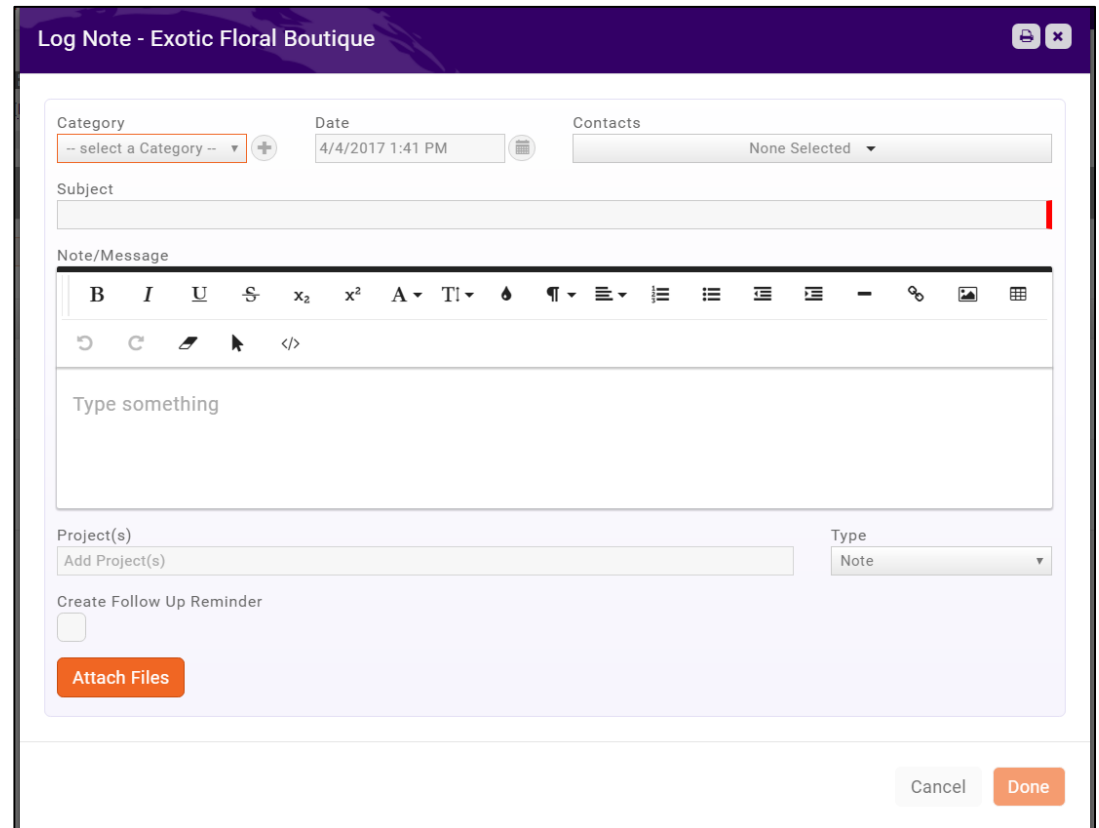
The screenshot shows the 'Scheduled Emails' tab in the software interface. It features a search bar, a 'Show only...' dropdown, and a 'Customize Results...' button. Below these is a table with the following data:

Scheduled Date	Sent Date	Status	Subject	From	Sender Name	Actions
5/15/2018 10:00 AM	5/15/2018 10:00 AM	Sent	Education Opportunity	Cheri Petterson	Cheri Petterson	 
3/6/2018 10:00 AM	3/6/2018 10:00 AM	Sent	Training	Cheri Petterson	Cheri Petterson	 
12/18/2018 10:00 AM	12/18/2018 10:00 AM	Sent	Volunteers Needed	Cheri Petterson	Cheri Petterson	 
12/27/2018 10:00 AM	12/27/2018 10:00 AM	Sent	Volunteers Needed!!!	Cheri Petterson	Cheri Petterson	 
10/26/2018 1:45 PM	10/26/2018 1:45 PM	Sent	Thank you for renewing	Cheri Petterson	Cheri Petterson	 
10/8/2018 2:57 PM	10/8/2018 2:57 PM	Sent	Thank you for renewal	Cheri Petterson	Cheri Petterson	 
10/2/2018 10:00 AM	10/2/2018 10:00 AM	Sent	New Training Opps	Cheri Petterson	Cheri Petterson	 

Logging Calls/Notes

Through your communications tab you can also log notes/calls and maintain that information within your database

WIKI: [Log Notes/Phone Calls](#)



The screenshot shows a web-based form titled "Log Note - Exotic Floral Boutique". The form includes the following fields and controls:

- Category:** A dropdown menu with the text "-- select a Category --" and a plus icon.
- Date:** A text input field containing "4/4/2017 1:41 PM" and a calendar icon.
- Contacts:** A dropdown menu with the text "None Selected".
- Subject:** A text input field.
- Note/Message:** A rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), subscript (x₂), superscript (x²), text color (A), text background color (T), font size, font style, font weight, font color, link, unlink, list, and table. Below the toolbar is a text input field with the placeholder "Type something".
- Project(s):** A text input field with the placeholder "Add Project(s)".
- Type:** A dropdown menu with the text "Note".
- Create Follow Up Reminder:** A checkbox.
- Attach Files:** An orange button.
- Cancel:** A light blue button.
- Done:** An orange button.

Questions?

