GrowthZone Communications – The Basics

GrowthZone
smarter association software

Agenda

Setting up Communications

Automated Communications

Sending/Scheduling Emails

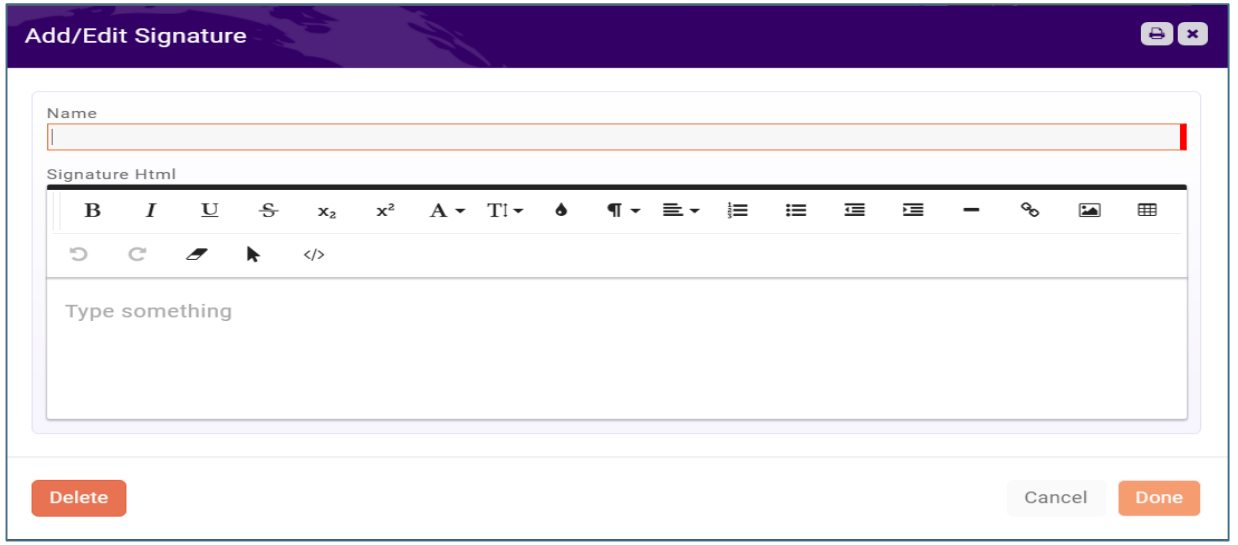
Logging Calls & Notes

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



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

Email Templates

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

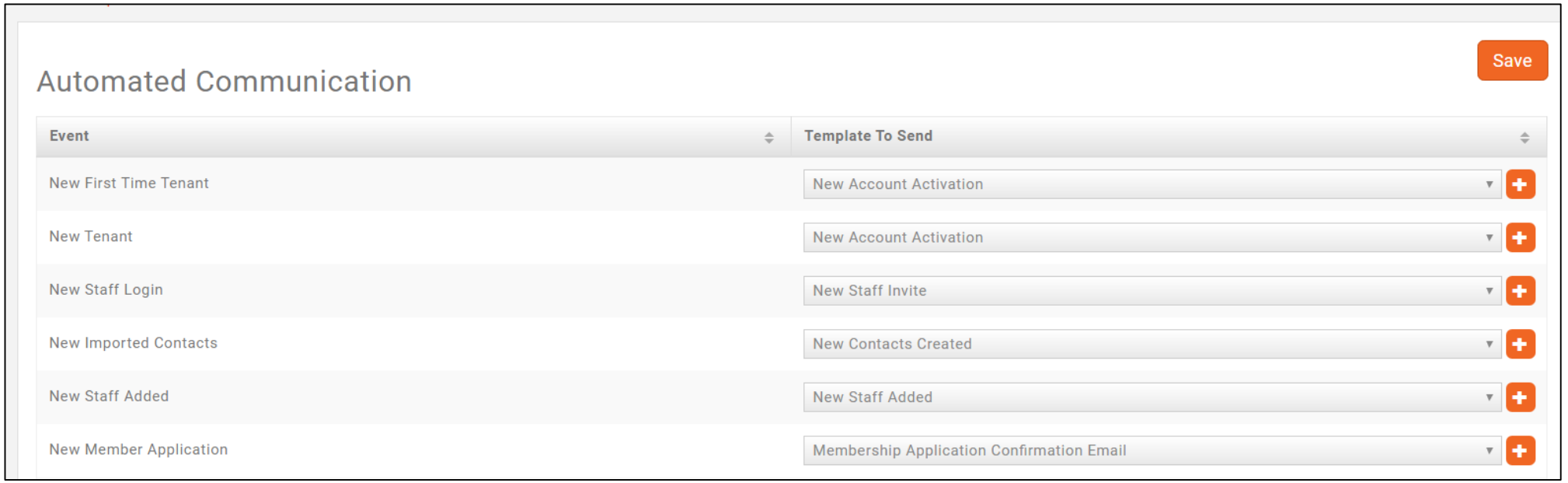
View/Create Templates

Setup > Communications > Email Templates

Automated Communications

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

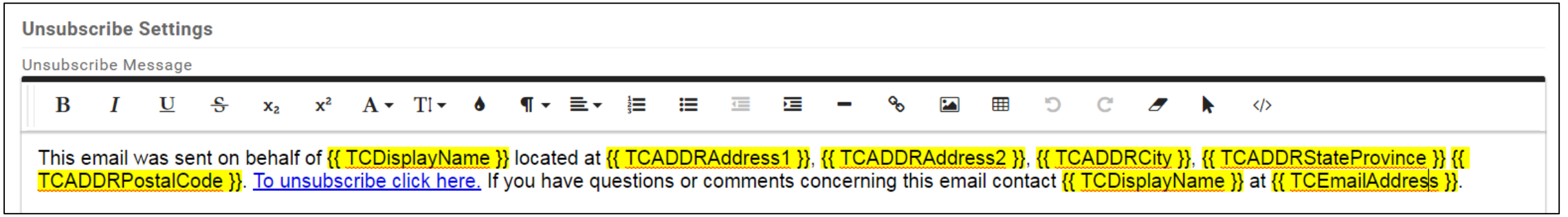
WIKI: Automated Messaging



Sending Emails

Setup > Communications > Email Settings

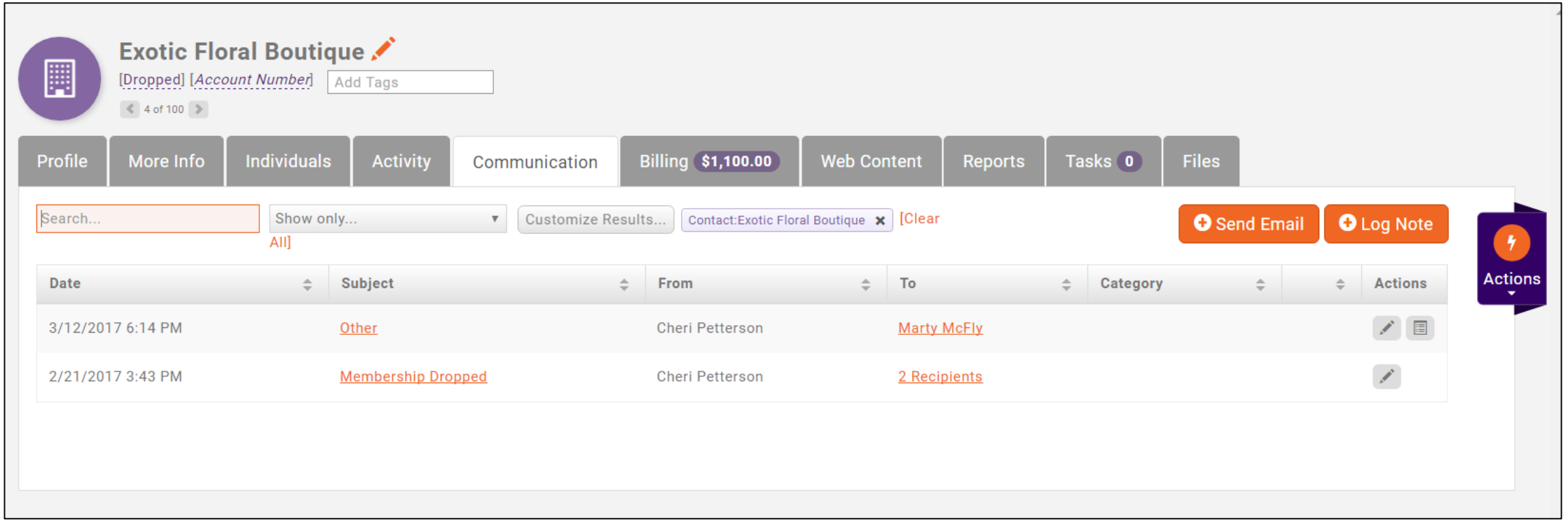
- Archive Email Address (MemberZone vs. Outlook)
- Unsubscribe Settings



- WIKI: Email Settings

Sending Emails/Monitoring Communications

WIKI: Sending Emails

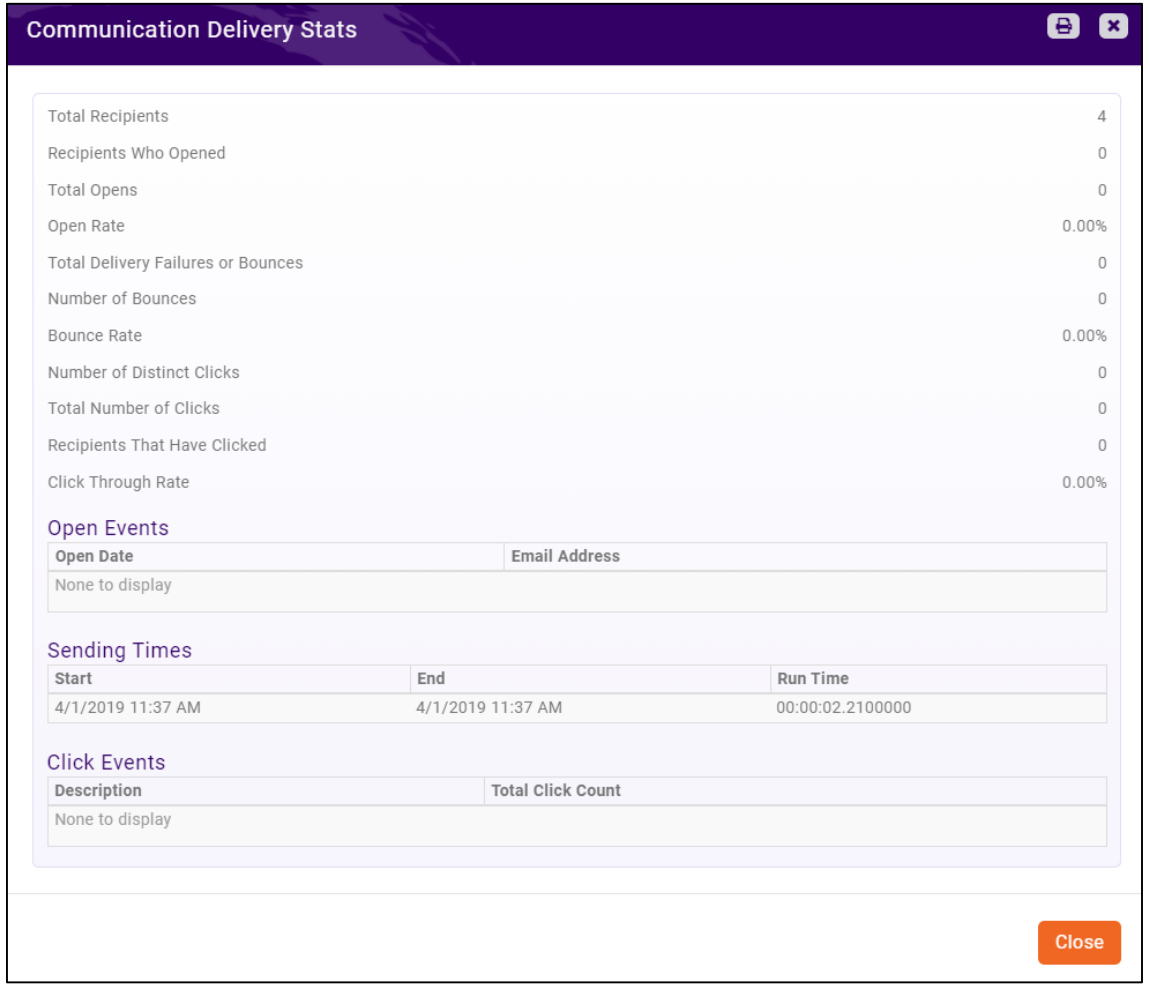


Sending Emails/Monitoring Communications

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

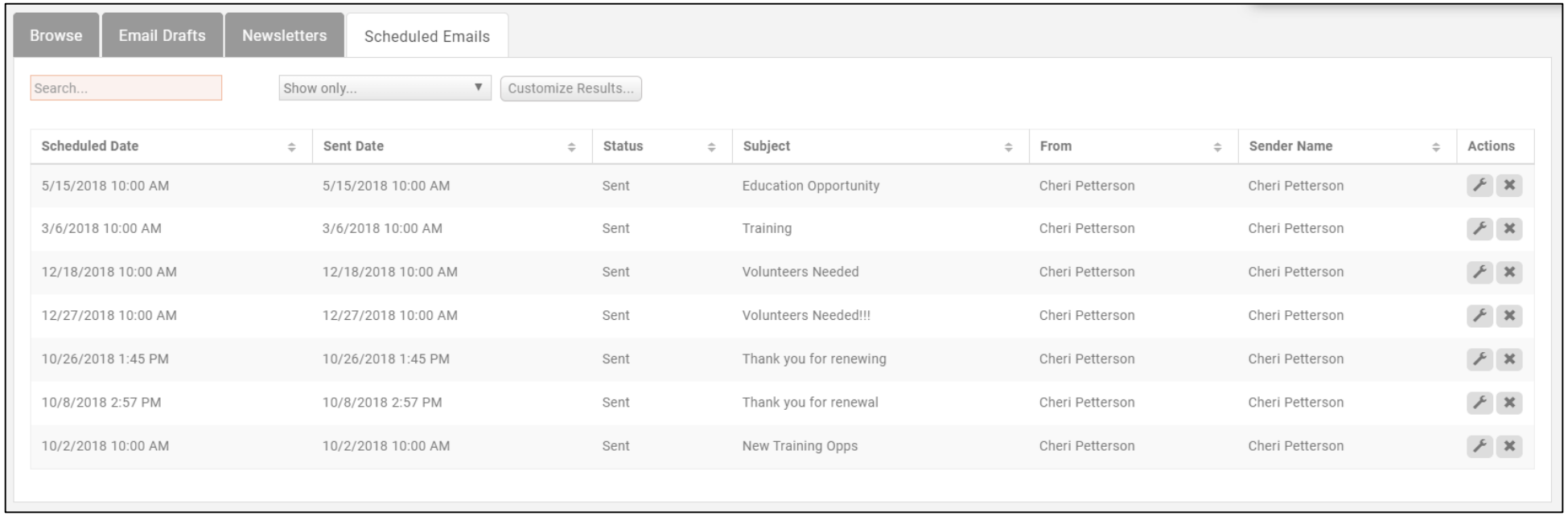
WIKI: View Email Delivery Statistics



Scheduled Emails

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

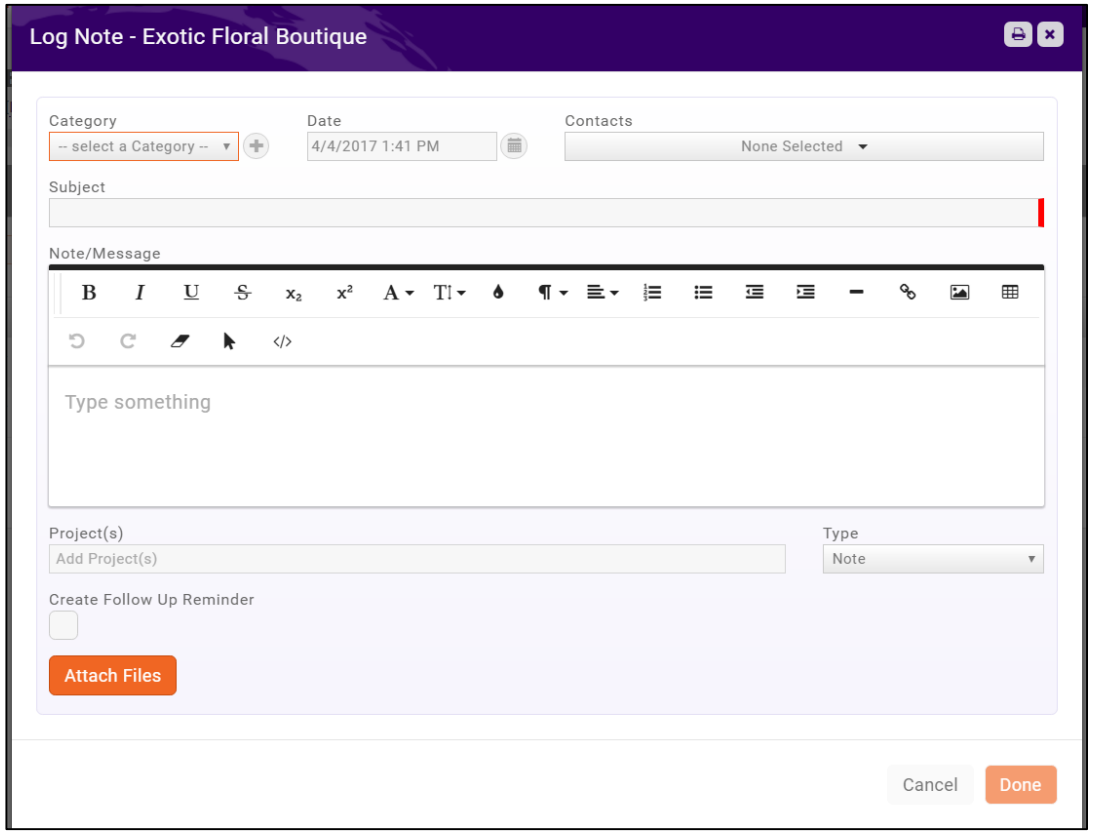
WIKI: View/Edit/Delete Scheduled Emails



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



Questions?

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