

# GrowthZone Communications - The Basics



# Agenda

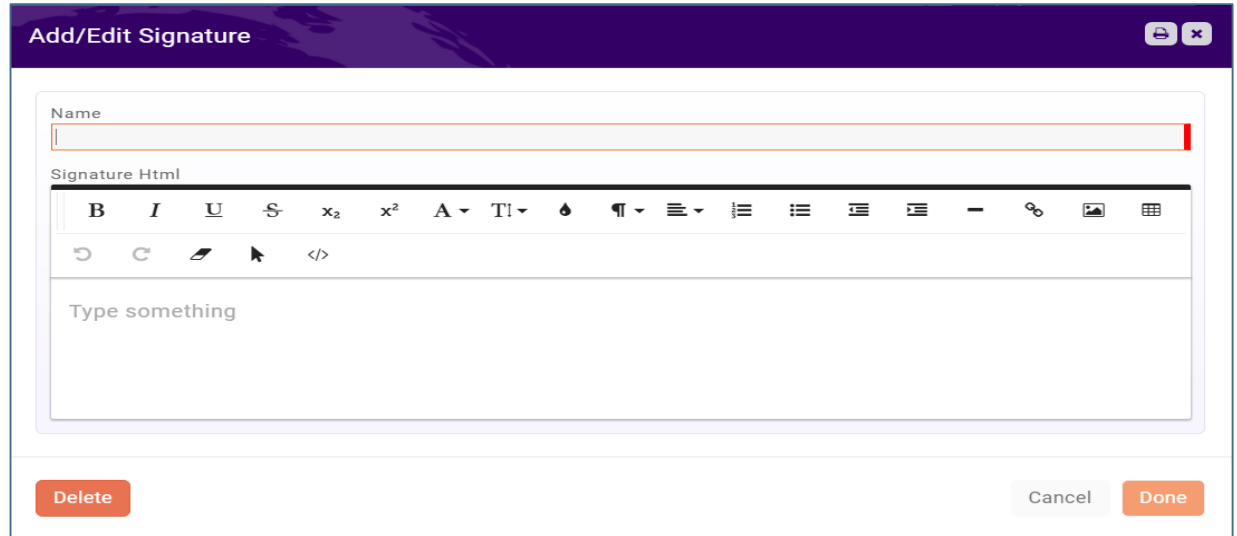
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- Setting up Communications
- Automated Communications
- Sending/Scheduling Emails
- Logging Calls & Notes
- Reviewing Communications

# 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](#)



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 (x<sub>2</sub>), superscript (x<sup>2</sup>), font color (A), text color (T), background color (d), indent (¶), bulleted list (≡), numbered list (≡), link (≡), unlink (≡), decrease indent (—), redo (↶), undo (↷), eraser (eraser), mouse cursor (mouse cursor), and source code (</>). 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
<a href="#">Initial contact</a>		<input type="checkbox"/>
<a href="#">Member Welcome</a>		<input type="checkbox"/>
<a href="#">Prospect</a>		<input type="checkbox"/>
<a href="#">Events</a>		<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
<a href="#">Auto Payment Receipt</a>	Billing Finance	
<a href="#">Billing Finance</a>	Billing Finance	
<a href="#">Online Payment Receipt</a>	Billing Finance	
<a href="#">ScheduledBillingResultsTemplate</a>	Billing Finance	
<a href="#">Stripe Charge Failed</a>	Billing Finance	
<a href="#">Board Committee</a>	Board Committee	
<a href="#">Chapter Sub-Organization</a>	Chapter Suborganization	

# Automated Communications

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

WIKI: [Automated Messaging](#)

### Automated Communication

Save

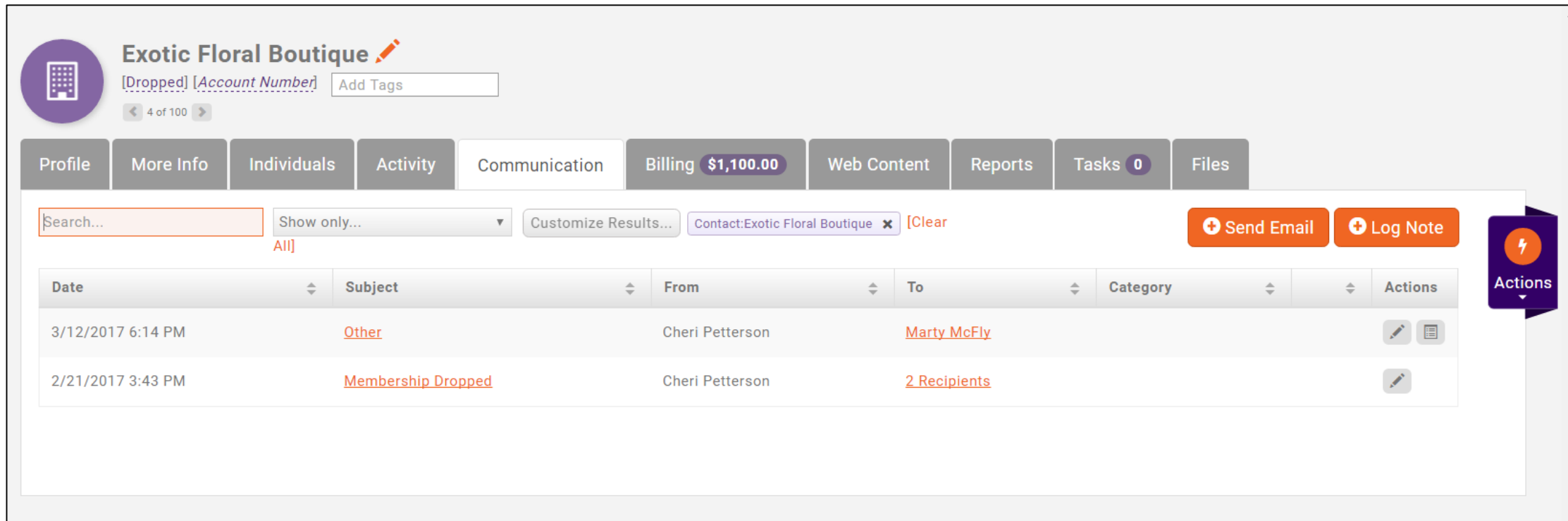
Event	Template To Send
New First Time Tenant	New Account Activation +
New Tenant	New Account Activation +
New Staff Login	New Staff Invite +
New Imported Contacts	New Contacts Created +
New Staff Added	New Staff Added +
New Member Application	Membership Application Confirmation Email +








# 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 are navigation tabs: Profile, More Info, Individuals, Activity, Communication (selected), Billing (\$1,100.00), Web Content, Reports, Tasks (0), and Files. A search bar and filter options are present, including 'Show only...' and 'Customize Results...'. Two orange buttons, 'Send Email' and 'Log Note', are visible. A table of communications is shown below, with columns for Date, Subject, From, To, Category, and Actions. A purple 'Actions' button with a lightning bolt icon is on the right side of the table.

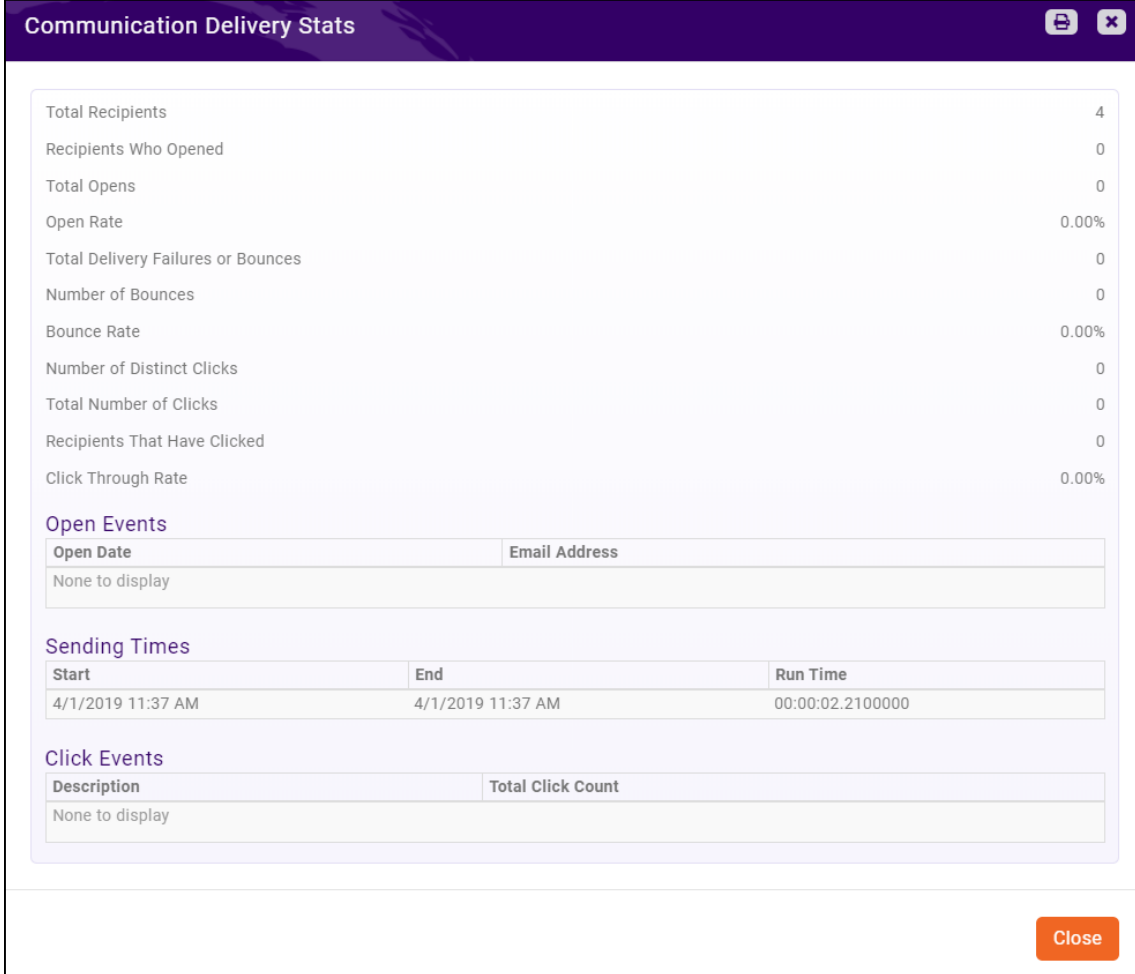
Date	Subject	From	To	Category	Actions
3/12/2017 6:14 PM	<a href="#">Other</a>	Cheri Petterson	<a href="#">Marty McFly</a>		 
2/21/2017 3:43 PM	<a href="#">Membership Dropped</a>	Cheri Petterson	<a href="#">2 Recipients</a>		

# 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](#)



The screenshot shows a window titled "Communication Delivery Stats" with a dark purple header. The main content area is white and contains a list of statistics on the left and their corresponding values on the right. Below the statistics are three sections: "Open Events", "Sending Times", and "Click Events", each with a table. The "Open Events" table is empty. The "Sending Times" table has one row with columns for Start, End, and Run Time. The "Click Events" table is empty. A "Close" button is located in the bottom right corner.

Total Recipients	4
Recipients Who Opened	0
Total Opens	0
Open Rate	0.00%
Total Delivery Failures or Bounces	0
Number of Bounces	0
Bounce Rate	0.00%
Number of Distinct Clicks	0
Total Number of Clicks	0
Recipients That Have Clicked	0
Click Through Rate	0.00%

**Open Events**

Open Date	Email Address
None to display	

**Sending Times**

Start	End	Run Time
4/1/2019 11:37 AM	4/1/2019 11:37 AM	00:00:02.2100000

**Click Events**

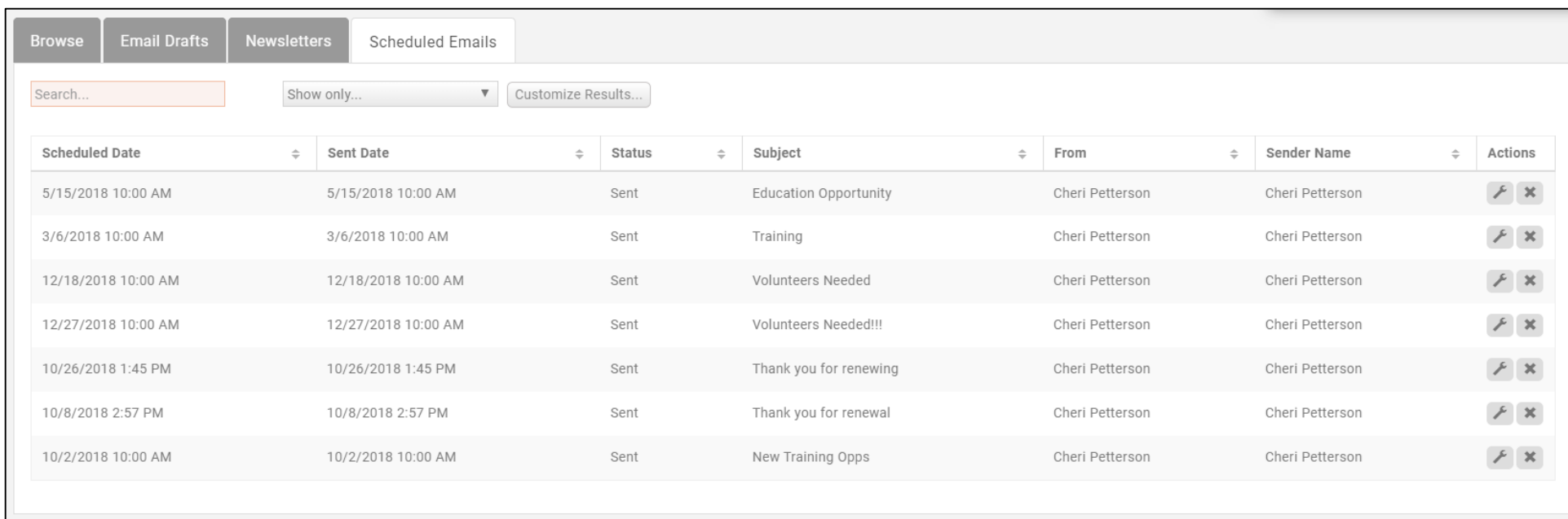
Description	Total Click Count
None to display	















Close

# Scheduled Emails

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

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

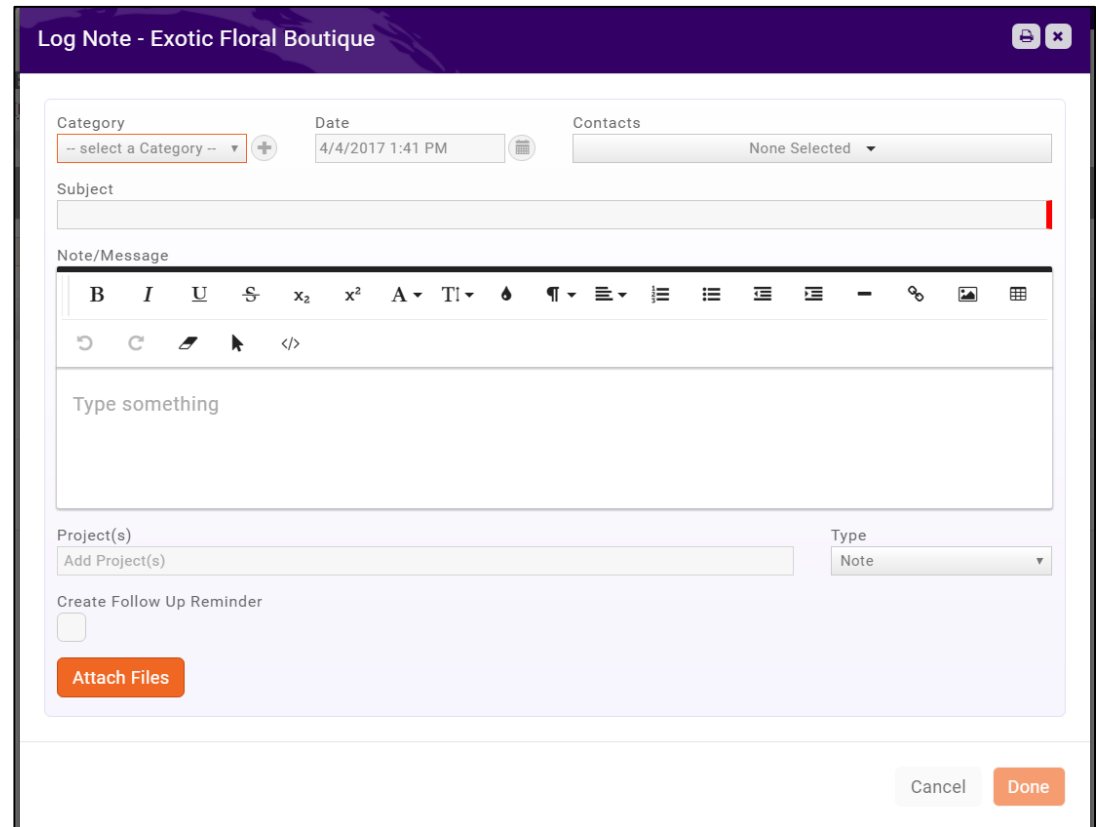


Scheduled Date	Sent Date	Status	Subject	From	Sender Name	Actions
5/15/2018 10:00 AM	5/15/2018 10:00 AM	Sent	Education Opportunity	Cheri Petterson	Cheri Petterson	 
3/6/2018 10:00 AM	3/6/2018 10:00 AM	Sent	Training	Cheri Petterson	Cheri Petterson	 
12/18/2018 10:00 AM	12/18/2018 10:00 AM	Sent	Volunteers 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 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 "None Selected" and a downward arrow.
- 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 (x<sub>2</sub>), superscript (x<sup>2</sup>), 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 "Add Project(s)" and a plus icon.
- Type:** A dropdown menu with "Note" and a downward arrow.
- Create Follow Up Reminder:** A checkbox.
- Attach Files:** An orange button.
- Cancel:** A light blue button.
- Done:** An orange button.

Questions?

