

GrowthZone Communications - The Basics

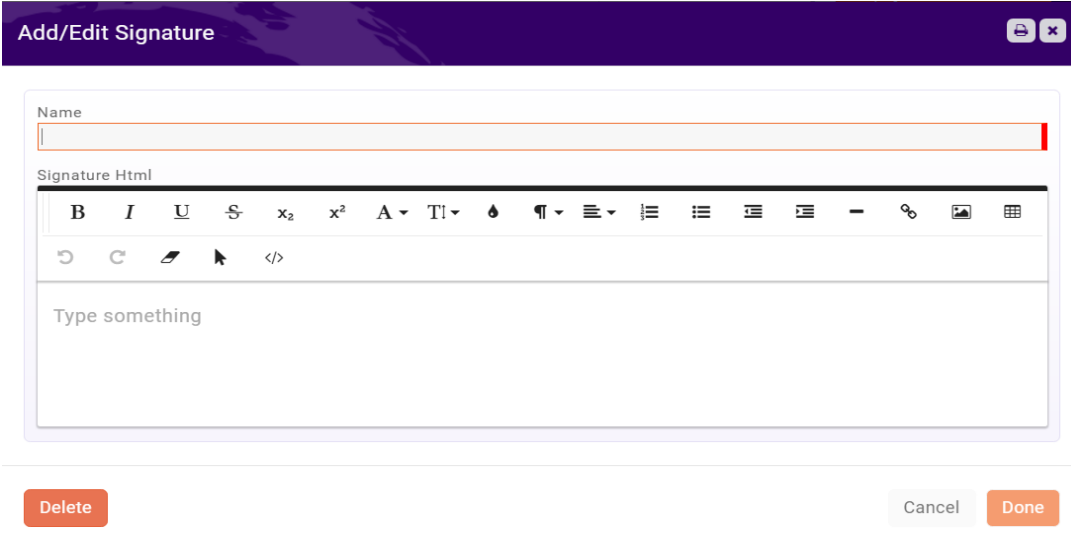
Cheri Petterson

Agenda

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

Setting Up Communications

- Signatures > Communications > Signatures > Add



Add/Edit Signature

Name

Signature Html

Type something

Delete Cancel Done

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.

Communication Categories + Add

Name	Color	Actions
Initial contact		✕
Member Welcome		✕
Prospect		✕
Events		✕








Email Templates

- Email templates provide an easy way to respond to standard email tasks.
 - For example, you may wish to send a thank you email to all those who have attended an event. You can create (or customize a default) template that can be used consistently for all of your events. This will allow you to efficiently send emails, and increase productivity.
 - 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.

View/Create Templates

- Setup > Communications > Email Templates

+ 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

- Setup > Communications > 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

Search... Show only... Customize Results... + Add Email List

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

Lists/Committees

- 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

Volunteers

General
Contacts
Communication
Events
Files

Name

Category

Member Lists +

Established On

Save

⚡
Actions

Description

Sponsor

Meeting Time Description

Default Term (Months)

Display Options

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

Sending Emails

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


Unsubscribe Settings


Unsubscribe Message

B I U ☒ x₂ x² A ▾ T! ▾ 🔥 📏 ▾ ☰ ▾ ☰ ▾ ☰ ▾ ☰ ▾ - 🔗 🖼️ 📅 🔄 ↻ ✍️ 🖱️ </>

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 }}**.

Sending Emails/Monitoring Communications



Exotic Floral Boutique 

[Dropped] [Account Number]

◀ 4 of 100 ▶

Profile

More Info

Individuals

Activity

Communication

Billing \$1,100.00

Web Content

Reports




Tasks 0

Files

Contact:Exotic Floral Boutique x [Clear]

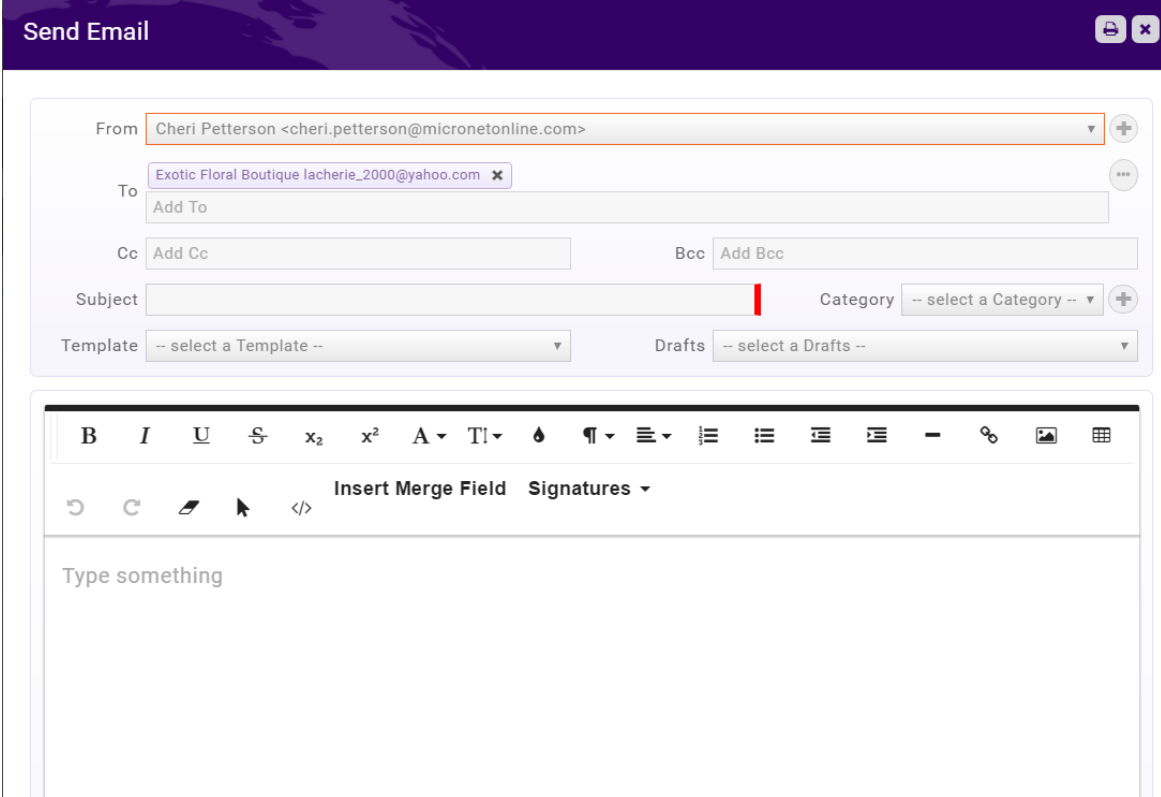
+ Send Email

+ Log Note

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		

⚡
Actions

Sending Emails/Monitoring Communications



The screenshot shows a 'Send Email' interface with the following fields and options:

- From:** Cheri Petterson <cheri.petterson@micronetonline.com>
- To:** Exotic Floral Boutique lacherie_2000@yahoo.com (with an 'x' to remove)
- Add To:** Input field for additional recipients.
- Cc:** Add Cc
- Bcc:** Add Bcc
- Subject:** Input field with a red vertical bar.
- Category:** -- select a Category --
- Template:** -- select a Template --
- Drafts:** -- select a Drafts --

Below the fields is a rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Subscript (x₂), Superscript (x²), Font Color (A), Text Color (T), Bulleted List, Numbered List, Indent, Outdent, Link, Image, and Table. Below the toolbar are icons for Undo, Redo, Erase, Pointer, and Source Code (</>), along with 'Insert Merge Field' and 'Signatures' options. The main text area contains the placeholder text 'Type something'.

Sending Email/Monitoring Communications

Communication Delivery Stats
🖨️ ✕

Total Recipients	1
Recipients That Opened	0
Total Opens	0
Open Rate	0.00%
Total Delivery Failures	0

Open Events

Open Date	Email Address
None to display	

Sending Times


Start	End	Run Time
None to display		

Close

Scheduled Emails

Attach Files

Project

Delay Delivery Until 

Logging Calls/Notes

Log Note - Exotic Floral Boutique 🔍 ✕

Category: -- select a Category -- + Date: 4/4/2017 1:41 PM 📅 Contacts: None Selected ▼

Subject:

Note/Message

B *I* U ~~S~~ x₂ x² A ▾ T1 ▾ 🔥 ¶ ▾ ☰ ▾ ☷ ▾ ☰ ▾ ☷ ▾ - ✂ 🖼 📅

↶ ↷ ✍ 🖱 </>

Type something

Project(s): Type: Note ▼

Create Follow Up Reminder

Questions?