

# GrowthZone - Communications (The Basics)



# Agenda

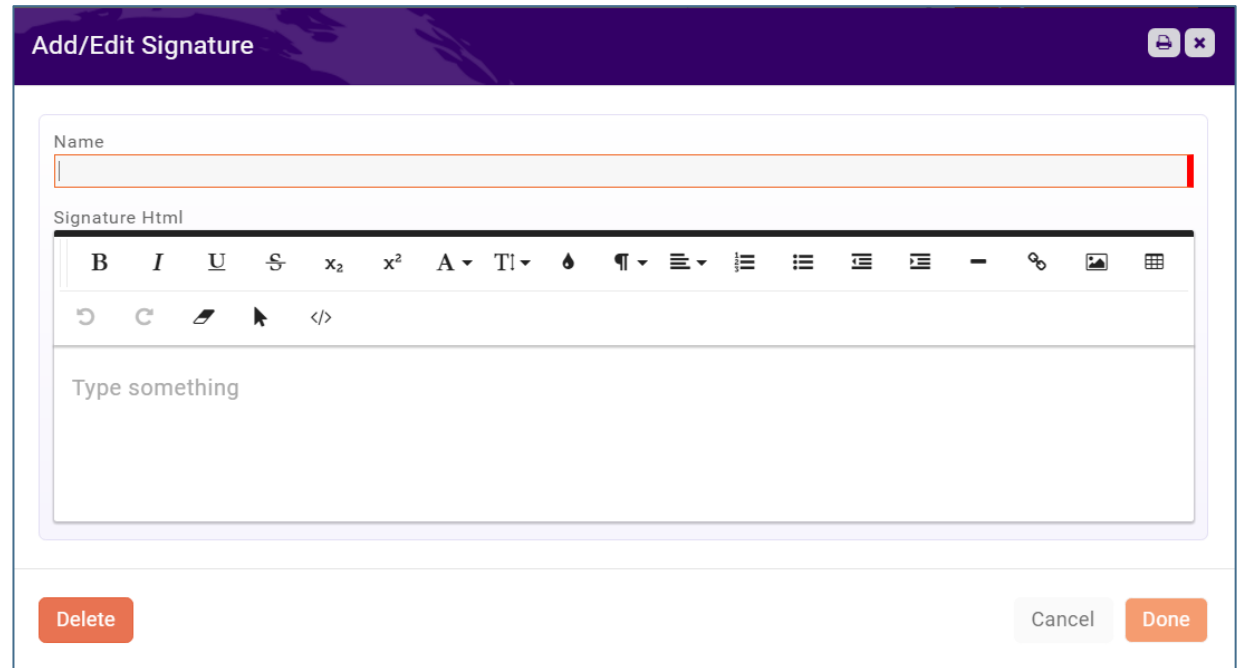
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- Setting up Communications
- Automated Communications
- Sending/Scheduling Emails
- Logging Calls & Notes
- Reviewing Communications

# 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.

GZ Knowledge Base:  
[Create your Signature](#)



The screenshot shows a dialog box titled "Add/Edit Signature" with a dark purple header. Inside the dialog, there is a "Name" text input field at the top. Below it is a "Signature Html" section containing a rich text editor. The editor's toolbar includes buttons 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 (fill), bulleted list, numbered list, decrease indent, increase indent, link, unlink, insert image, and table. Below the toolbar is a large text area with the placeholder text "Type something". At the bottom of the dialog, there are three buttons: "Delete" (orange), "Cancel" (light gray), 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

GZ Knowledge Base: [Configure Communication Categories](#)



Name	Color	Actions
<a href="#">Initial contact</a>		X
<a href="#">Member Welcome</a>		X
<a href="#">Prospect</a>		X
<a href="#">Events</a>		X

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.

GZ Knowledge Base: [Create and Manage Email Templates](#)

# View/Create Templates

## Setup > Communications > Email Templates

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

GZ Knowledge Base: [Automated Messaging](#)

[Back to Setup](#)

### Automated Messaging

Search... Login Create/Reset Save

Category	Reason for message	Template To Send	Do Not Send
Login Create Reset	Staff Login Reset	Logins Reset 	<input type="checkbox"/>
Login Create Reset	Email Member Login Info	Member or Representative Online Access 	<input type="checkbox"/>
Login Create Reset	Email Member Login Added	Member or Representative Online Access Added 	<input type="checkbox"/>
Login Create Reset	Email Member Login Instruction	ARCHIVE New Member Access 	<input type="checkbox"/>
Login Create Reset	User Login Reset	User Password Reset 	<input type="checkbox"/>
Login Create Reset	User Login Reminder	Username Reminder 	<input type="checkbox"/>
Login Create Reset	Request Magic Link	-- Select a Template To Send --  	<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 ~~ABC~~  $x_2$   $x^2$  **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 }}.

- GZ Knowledge Base: [Email Settings](#)



# Sending Emails/Monitoring Communications

## GZ Knowledge Base: Sending Emails


**Exotic Floral Boutique**   
[Dropped] [Account Number] Add Tags  
◀ 4 of 100 ▶




ProfileMore InfoIndividualsActivityCommunicationBilling **\$1,100.00**Web ContentReportsTasks 0Files

Show only...  
All

Customize Results... Contact:Exotic Floral Boutique [Clear]

Send EmailLog Note

**Actions**

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.

GZ Knowledge Base:

[View Email Delivery Statistics](#)

Communication Delivery Stats

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

GZ Knowledge Base: [View/Edit/Delete Scheduled Emails](#)

Browse

Email Drafts

Newsletters

Scheduled Emails

Search...

Show only...

Customize Results...

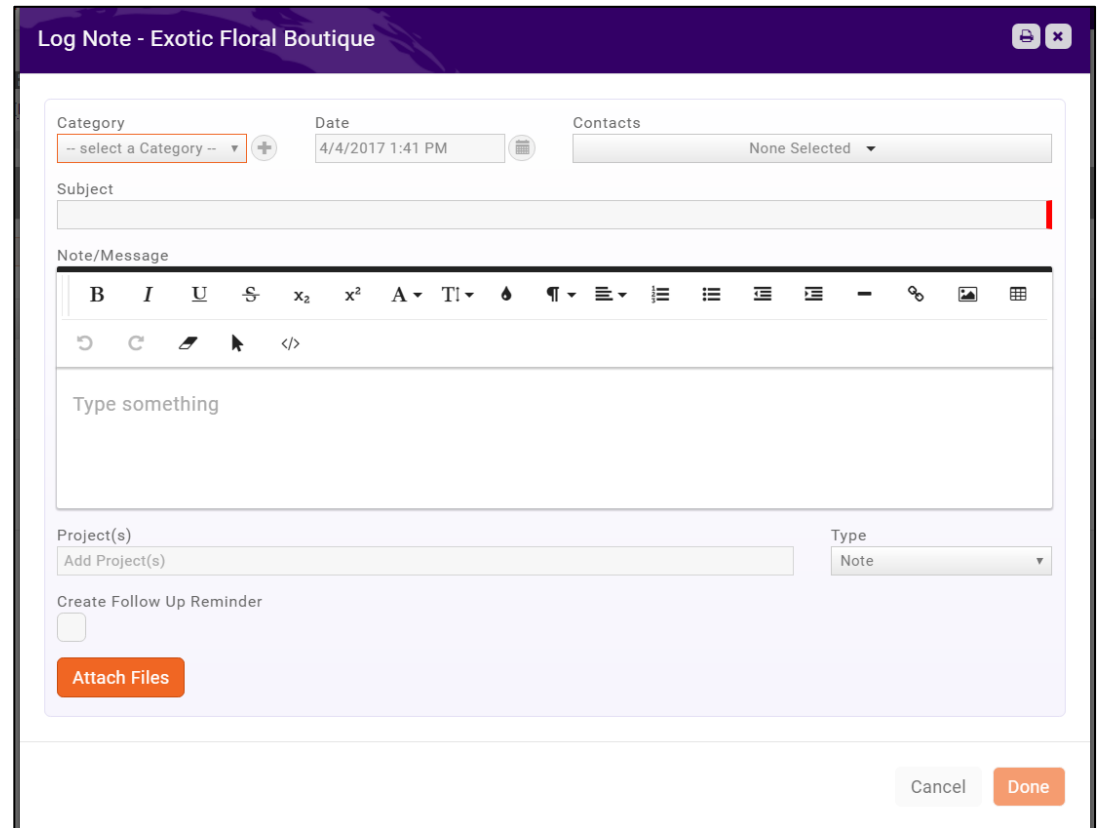
Scheduled Date	Sent Date	Status	Subject	From	Sender Name	Actions
5/15/2018 10:00 AM	5/15/2018 10:00 AM	Sent	Education Opportunity	Cheri Petterson	Cheri Petterson	<div><div></div><div></div></div>
3/6/2018 10:00 AM	3/6/2018 10:00 AM	Sent	Training	Cheri Petterson	Cheri Petterson	<div><div></div><div></div>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

# Logging Calls/Notes

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

GZ Knowledge Base:

[Log Notes/Phone Calls](#)



The screenshot shows a web application window titled "Log Note - Exotic Floral Boutique". The interface includes a header bar with a purple gradient and a close button. Below the header, there are several input fields: "Category" with a dropdown menu showing "-- select a Category --", "Date" with a text input showing "4/4/2017 1:41 PM", and "Contacts" with a dropdown menu showing "None Selected". Below these is a "Subject" text input field. The main section is titled "Note/Message" and contains a rich text editor with a toolbar featuring bold, italic, underline, strikethrough, subscript, superscript, text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, and image icons. Below the editor is a large text area with the placeholder text "Type something". At the bottom, there are fields for "Project(s)" with a dropdown showing "Add Project(s)", a "Type" dropdown showing "Note", and a "Create Follow Up Reminder" checkbox. An "Attach Files" button is located below the checkbox. At the very bottom right, there are "Cancel" and "Done" buttons.

# Questions?



## **Customer Service Hours:**

Monday-Friday: 8am to 5pm (Central)

[GZSupport@growthzone.com](mailto:GZSupport@growthzone.com)

800.825.9171, Option 4, then Option 2

## **Online Support Documentation:**

[GrowthZone Knowledge Base»](#)

## **Training Calendar:**

[View Training Event Calendar »](#)

## **Live Chat:**

[GrowthZone Support Portal \(chat on far right\) »](#)