

Welcome

In today's hectic world people expect their communications to be personal and professional. One channel isn't enough; organizations must meet people where they are. Sometimes that means pushing a message through email or text, other times it needs to be pulled from the web or social media. Rock gives you the tools you need to personalize your message through all these mediums and more. Let's jump in and see how Rock can be that communications assistant you've always dreamed of.

Sending a Communication

Communications are ways of pushing out messages to your attendees. Today this can be in the form of emails or SMS text messages, but in the future communications could offer many more options.

Rock has two tools for sending communications: our [Communication Wizard](#), which will make you feel like an email rock star, and the [Simple Email Editor](#), which is best suited for sending simple emails, such as from a group toolbox. If you're anxious to get started sending messages with the wizard, jump to the [Communication Wizard](#) section. If you'd like to learn about how communications work in Rock, read on.

But Wait, I Just Want To Send a Letter!

"These are great and all, but I need a good old-fashioned low-tech letter. Although I would like to use a fancy merge document and maybe a little Lava..." If this is you, you need to head over to the [Admin Hero Guide](#) for more info on Lava and merge docs.

Under the Hood of Communications

Rock's Communication Engine

Like a car engine, Rock's communication tool has a number of different parts or components. Most of them can be found in the *Communications* screen ([Admin Tools > Communications](#)). We'll be talking about many of them in depth throughout this guide, but you can read an overview of all of the parts in the *Communications* chapter of the [Admin Hero Guide](#) .

Mediums and Transports

Like everything in Rock, communications is designed to be extensible for the future. That means the messages of tomorrow won't be limited by the messages of today. The communications engine is based on two types of components: mediums and transports. Let's look at how that works.

Think of mediums as different communication channels. Today Rock provides an email medium and a SMS medium. Other mediums could easily be provided in the future for things like mobile application push notifications. These mediums can be written by either the core developers of Rock or by third-party developers. If you don't like it, change it! Mediums can be configured under:

[Admin Tools > Communications > Communication Mediums](#) .

Transports, on the other hand, can be thought of as the worker bees of the mediums. They do the actual work of getting the messages to their recipients. Today the *Email Medium* has transports for delivering emails through a normal SMTP server as well as via the Mailgun email service. Settings for the transport are configured under:

[Admin Tools > Communications > Communication Transports](#) .

A medium can only use one transport at a time. You select the transport under the medium administration.

Communications Send Job

Usually when you send a communication, it will be sent immediately to a communication queue that gets processed in almost real-time. There is, however, a Rock Job that runs every 30 minutes to look for communications with a pending status.

You can view this under: [Admin Tools > System Settings > Jobs Administration > Send Communications](#) .

You don't need to worry about this job, but we wanted to point it out so you know more

about how communications are sent.

Bounced Mail

We know you have much to share, so let's make sure you have the opportunity to do that. You have to process bounced mail to keep your email addresses accurate and improve your email reputation (a metric used by ISPs to help determine if your organization's email is spam). Bounced messages are emails that are returned back to you after you send them because an email address is incorrect or no longer valid. Rock can automate this process if you use an email integration that supports the notification of these messages. Currently, the only core integration that supports bounced mail processing is the Mailgun integration (more on this integration is provided under the Integrations chapter of this manual). Third-party provided solutions may be available for other services.

SMS in Detail

Sending a SMS and MMS text message is very similar to sending an email. The only difference is you have fewer fields to enter. You still have the ability to add merge fields to your messages so make sure to use this powerful feature. Let's look at how SMS communications work.

Add SMS Phone Number

You need to have a phone number before you can start sending and receiving texts. We recommend Twilio, and have a whole section for [setting up Twilio](#). Even if you don't have a phone number set up yet, it's important to be familiar with the *SMS Phone Number* settings because they are referenced throughout the remainder of this chapter.

These settings can be accessed when adding a new SMS phone number from [Admin](#)

[Tools](#) > [Communications](#) > [SMS Phone Numbers](#)

Add SMS Phone Number

Defined Value Id: 0

Add defined value for SMS Phone Numbers

Value **1**

Description **2**

Active **3**

Response Recipient **4**

Enable Response Recipient Forwarding **5**

Yes

Launch Workflow On Response Received **6**

Save Cancel

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- 1 Value**

Be sure that the phone number is in the Value field and that it is in the format of "+15555555555" (or similar for international numbers).
- 2 Description**

The description can be very helpful if you have multiple phone numbers.
- 3 Active**

Only Active phone numbers can receive responses. You might use a phone number for a large event and then inactivate it until the next event.
- 4 Response Recipient**

This person will receive the incoming messages sent to the SMS Phone Number you're setting up. Be sure the individual you select has a valid SMS phone number on their record.
- 5 Enable Response Recipient Forwarding**

If "Yes" is selected, then incoming messages to this SMS Phone Number will be sent to the selected Response Recipient. If "No" is selected, then the conversation will stay in Rock (e.g. SMS Conversations).
- 6 Launch Workflow On Response Received**

You have the option of automatically launching a workflow when a response is received. Use this field to indicate which workflow should launch.

SMS Replies

When you send an SMS message from Rock, you have two options on how responses are handled. You can choose to have the responses sent to a configured mobile phone (great for responses on the go). Or, you can manage responses from inside of Rock

(great for when you expect a lot of responses).

Respond from a Device

When you send an SMS message, you'll select an SMS number to send from. When *Enable Response Recipient Forwarding* is enabled, responses will be forwarded to the response recipient's mobile phone with the sender's name and a response code. The response code consists of the @ symbol followed by a three-digit number (e.g., @347). If further follow-up is required, the response recipient can use this code to reply back.

If your mind is swimming a bit, that's OK. Let's look at an example. In our example Jenny has just sent out a bulk SMS message to several attendees reminding them of the car show that afternoon. Let's walk through a conversation she has with Alisha.

SMS Example

1 Bulk Message
The original bulk SMS message. Notice Jenny has cleverly used merge fields to personalize the text message with each recipient's name.

2 First Response

Alisha then responds to the message.

3 Response Code

The response goes back to Rock's SMS phone number. Rock then looks up that number's response recipient and relays the message to Jenny's phone. Because the message is no longer directly from Alisha, Rock adds Alisha's name to the message and also the response code @671.

4 Sent to Alisha

Jenny decides she would like to continue the conversation so she writes a quick message back including the response code. Rock will use this code to match the conversation back to Alisha.

5 Shows Message

Alisha receives Jenny's response. Note how Rock has removed the response code. To Alisha it appears that she is texting Jenny directly.

Notice that both sides of the conversation are texting to Rock's SMS number (555) 351-5392. Little does Alisha know that Jenny's real number is 867-5309.

Respond from Rock

Now, let's take a step back and see how to manage responses right from Rock. This works when *enable response recipient forwarding* is set to *no* or left blank. In this case, the messaging will take place in Rock on the page under:

People > Communications > SMS Conversations .

The screenshot shows the 'SMS Conversations' page. At the top, there's a search bar and a user profile icon. Below that, the page title 'SMS Conversations' is displayed. The main interface is divided into two sections: a list of contacts on the left and a conversation window on the right. The contact list includes names like Ted Decker, Jenny Michaels, Sarah Simmons, Alisha Marble, Pete Foster, Jim Simmons, Daniel Peak, Pam Foster, Sam Hanks, and Paul Smith. The conversation window shows a message from Ted Decker and responses from other users. A 'Send' button is visible at the bottom right of the conversation window. Numbered callouts (1-4) highlight specific features: 1 points to the 'New Conversation' button, 2 points to the contact list, 3 points to the 'Main Number' dropdown, and 4 points to the 'Show/Hide' toggle.

1 New Conversation

This will open up a new conversation window to start a conversation with a selected individual.

2 All Responses

Response Listing – this panel displays all the responses to the specific SMS number.

3 Available SMS numbers

At the top shows all the SMS numbers that do not have *enable response recipient forwarding*. If only one was available, then the dropdown would be replaced with a label.

4 Show/Hide

Will open the option to toggle between show/hide read messages.

You will find that each option has its purpose and benefit to your organization and the communications you'll have with attendees, members, and volunteers. But don't let us stop you from customizing your SMS communications page.

We realize that every organization is different, so we add in settings to allow you to customize each feature for your needs. Suppose you have the Students Director and First Impressions Director using communications for scheduling different events with their volunteers. This could be done with the out of the box SMS Conversations page, or you can customize this so the two can only see their own SMS number on different pages.

Create Multiple SMS Pages

Use blocks to create multiple pages for SMS Conversations. On each page you can then specify who can access these pages and which number/numbers are used for that SMS page. To learn more about creating pages and blocks check out the [Designing and Building Websites using Rock](#) guide.

SMS Number Strategies

Now that you've seen how SMS replies are handled within Rock, let's touch briefly on strategies to implement this effectively in your organization. SMS services like Twilio make it very inexpensive to rent phone numbers for SMS. (A number from Twilio runs only \$1 per month.) Don't limit your organization to a single number. Think about getting a number for each department and/or heavy SMS user. It's also very easy to turn a SMS number on and off. You might grab a number for a large event and remove it after the event is over. You can also reuse a number internally by switching the *Response Recipient* as needed.

MMS Considerations

Standard MMS (aka, Multimedia Messaging Service) messages allow you to send images, slideshows, videos and audio clips as attachments. While this means you can do some creative things with your communications, there are some limitations to keep in mind. The biggest limitation is that the recipient's phone may not support all multimedia files. So, while you may be able to send a short video, not all of your recipients may be able to view it. Another thing to keep in mind is that some mobile carriers limit the file size of attachments being sent over their network. For example, Twilio limits messages that combine text and images to 5MB. If you try to send, say, an MMS message combining text and video, and the total size is greater than 5MB, Twilio will prevent the message from sending. Before sending out a large number of messages, it's a good idea to test your communications on various handsets using different file formats and sizes. See what works and what doesn't.

Getting Started With Twilio

See the [integrations](#) section for more information on configuring Twilio as your SMS provider.

Text to Workflow

Text to Workflow is another innovative tool that uses SMS communication. In addition to communicating, it also launches workflows that can do any number of functions. To read more about this powerful feature, see the [Text to Workflow](#) chapter of the [Blasting Off With Workflows](#) manual.

Twilio, Short Codes and MMS Messages

If you're using a Twilio short code, keep in mind that it doesn't automatically support MMS messages. You can add MMS capabilities for a one-time fee of \$500. This is different than regular "long codes" (phone numbers) where MMS is usually automatically supported.

If you're not sure whether your account supports MMS messaging, check your Twilio Console. If you only see "Capabilities: SMS" and MMS is not listed then it's likely you haven't purchased MMS for your short code.

Long Code Throttling

It's still a bit like the Wild West out there when it comes to SMS and MMS. Each carrier has its own rules and practices. For many carriers, sending or receiving too many messages too quickly will set off spam warnings, which results in messages either not being sent or not being received. This can be a real problem when you need to send information to a lot of people at once.

Fear not. We've got you covered. Out of the box, Rock comes configured with Long Code Throttling. This global attribute slows the delivery of non-short code numbers. By default it is set to 100 milliseconds, or a 10th of a second, which is the rate we've found works best for both speed and reliable delivery. You can modify the rate, though, by changing your Twilio transport settings ([Admin Tools > Communications > Communication Transports](#)). You can also disable Long Code Throttling altogether. Keep in mind, though, that this may result in your messages not being delivered.

Nameless People

So, you're set up with SMS integration in Rock and you've been sending and receiving texts like the pro you are. In fact, you've got things running so well that word has spread about your fancy texting option for people wanting to reach out to you. That's an exciting accomplishment. But wait...who is that text from? It looks like you've started getting messages from people and numbers you don't recognize. If you're worried that this will cause a snag in your processes, don't be.

Rock will try to match the phone number of a new incoming SMS message to a person in the system. If it can't find anyone with that number, Rock will create a *Nameless Person* record instead. This allows the conversation to continue as normal without knowing their name or other contact information.

Nameless People in SMS Conversations

The screenshot shows the 'SMS Conversations' interface. On the left is a navigation sidebar with icons for home, list, profile, messages, settings, and a briefcase. The main header is orange with a search bar and a user profile icon. Below the header, the page title is 'SMS Conversations' with a breadcrumb 'Home > SMS Conversations'. The main content area is divided into two panes. The left pane shows a list of messages with the following details:

| Sender | Time |
|--|---------------|
| (602) 492-1234 1 | 4:10 PM |
| Hi Chip. It's a test from a new phone num... | |
| Ben Wiley | 9 Days Ago |
| Ben Wiley | |
| Garrett Johnson | 15 Days Ago |
| Garrett Johnson | |
| Jan Johnson | 24 Days Ago |
| Jan Johnson | |
| Emily Thomas | 25 Days Ago |
| Emily Thomas | |
| Thomas Smith | One Month Ago |

The right pane shows a detailed view of a message from '(Unknown Person) **2**'. The message text is: 'Hi Ted. It's George Smith. This is my new mobile phone number... You might want to write it down in your records.' The time is 4:10 PM. A 'Link To Person' button **3** is visible in the top right corner of the message view.

1 Phone Number

Since we don't know the person's name, you'll see the phone number here instead.

2 Unknown Person

This indicates the conversation is with an unknown (i.e. nameless) person.

3 Link To Person

Click this button to link the phone number to a new or existing person record. We'll cover that in detail below.

As new texts come in, you might lose track of your nameless people in the *SMS Conversations* page. Luckily, you can go to [Admin Tools > Communications > Nameless People](#) to see and manage your list of nameless records:

Nameless People Page

The screenshot shows the 'Nameless People' page. At the top, there's a navigation bar with a search icon and a user profile. Below that, the page title 'Nameless People' is displayed with a breadcrumb trail 'Home > Communications > Nameless People'. The main content area features a table with one row for a phone number '(602) 492-2865 (Unknown Person)'. A blue circle '1' highlights the phone number field, and another blue circle '2' highlights a person icon button next to it. Below the table is a pagination control showing '50 | 500 | 5,000' and '1 Nameless Person'.

1 Phone Number

All of the phone numbers Rock can't link to a person record are listed here.

2 Link To Person

Click the  button to link the phone number to a new or existing person record (see below).

Where Did My Nameless Person Go?

Each night, the *RockCleanup* job will go through the Nameless record types to look for a matching person record. If it finds a match it will merge them for you and the Nameless record will be removed.

Linking to an Existing Person

Once you know for sure who you're talking to, you'll want to link the phone number (and the conversation) to an actual person. You'll do this from the *Link Phone Number to Person* page. You can get there from the *SMS Conversations* page or from the *Nameless People* page as described above.

Link Phone Number to Person

Link Phone Number (602) 492-2865 to Person

Add New Person | Link Existing Person

1 Title

2 Connection Status

Birthdate

First Name

Role Adult Child

Grade

Last Name

Gender Male Female Unknown

Marital Status

Suffix

Save **Cancel**

1 Add New Person

As pictured above, this page lets you quickly and easily create a new person record to be linked with the phone number.

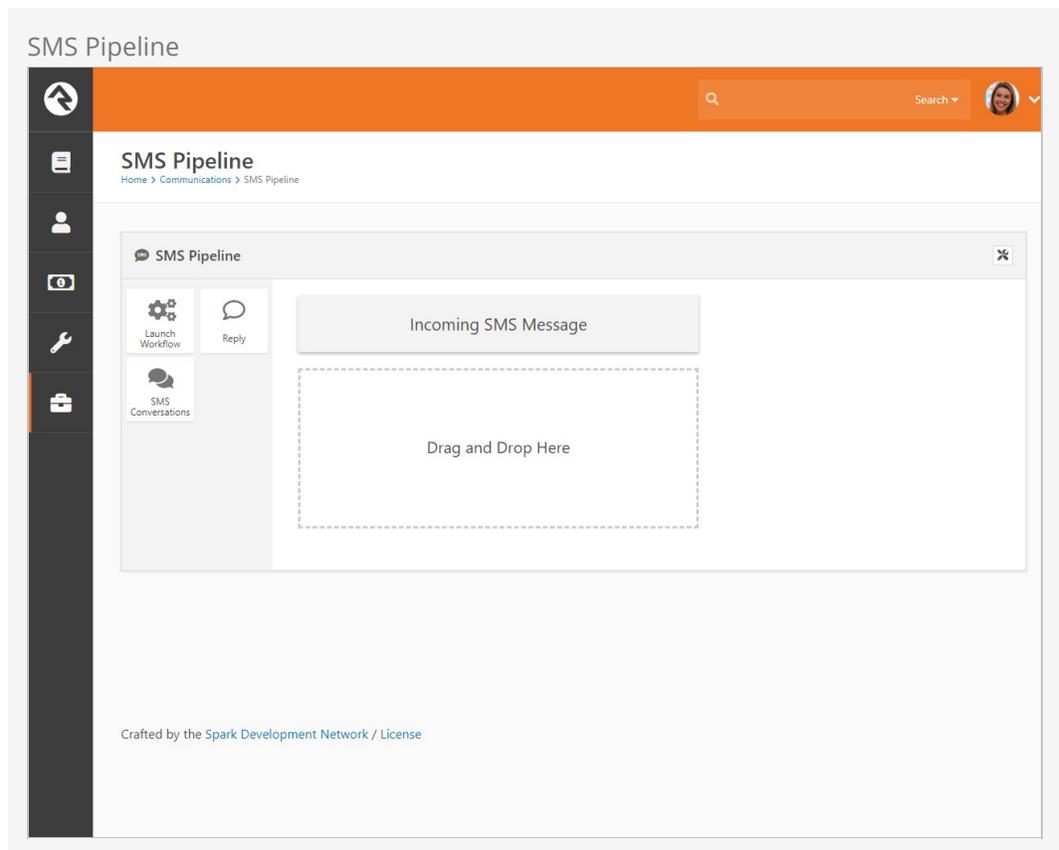
2 Link Existing Person

Clicking this button will give you a person picker screen so you can look up the existing record to be linked with the phone number.

SMS Pipeline

Traditionally each SMS feature includes its own webhook. With the SMS Pipeline you can condense your webhooks into one webhook. This allows the use of the same number for multiple purposes.

To start, navigate to `Admin Tools > Communications > SMS Pipeline`. This is the initial pipeline page.



You will see a pipeline with the Incoming SMS Message, and on the left side there is a list of SMS actions that can be configured. Define your pipeline by dragging the actions from the left into the pipeline. Rock ships with the set of actions shown, adding plugins can extend this list to provide additional capabilities.

The Fundamentals

Let's cut to the chase to see how this all works and why it can be beneficial for your

organization.

1. A message is received which starts at the top of the pipeline. (this part is not configurable; it is built into the pipeline).
2. Once the message comes in actions are checked in order to see if their filters match the incoming message.
3. If it matches an action, then the action will run.
4. The pipeline then looks at the matched action's continue option to see if the message should continue down the pipeline, or if the processing is complete.

Still a little unsure about this? Don't worry there's more to come.

Anatomy of Actions

Below we see the properties of an action, every action has these properties available while the rest of the action will have different filters, except each filter will have the phone number option. We will go over all the filter options in this chapter.

SMS Pipeline

Home > Communications > SMS Pipeline

SMS Pipeline

Incoming SMS Message

SMS Conversations

1 Launch Workflow

2 Reply

1 Group Response

2 Connect Response

3 Launch Workflow

4 SMS Conversations

SMS Conversations

2 Name

SMS Conversations

3 Active

4 Continue

Filters

Phone Numbers

| | | |
|--------------|----------|---|
| +15554934995 | Equal To | X |
| +15558654648 | Equal To | X |
| +15556486654 | Equal To | X |

5 +

Save Cancel Delete

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1 Actions

These are the available actions that you can add to the pipeline.

2 Name

This is the name of the action within the pipeline. The default will be the type of action it is. You can change this to be more specific like "Baptism Response" or "Connect Workflow" according to the purpose of the action.

3 Active

Active means it will perform an action when the message meets the requirements. When active is disabled, the action won't run.

4 Continue

If the filters of the action match the current request, then the action will run. The Continue option determines if the request should continue down the pipeline to have other actions run, or if the request should be considered done and other actions not be considered.

5 Phone Number

This is the number (or numbers) that someone will send a message to, which will use the pipeline process and the same webhook.

Pipeline Actions

Let's take a quick look at the actions that come out of the box.

SMS Conversation

The conversation action is typically at the bottom of the pipeline. This keeps the pipeline flowing and at the end of the day you can have a simple text-to-text conversation if that is all the other person needs. Check out the *SMS in Detail* chapter for detail about wiring up SMS conversations using a mobile phone or the *Rock SMS Conversation* page.

Reply

The reply action is an easy way to automate responding to an incoming text. In the past you would have had to create a text to workflow for this type of functionality. This takes auto responses to a new level of simplicity. Here's how it works:

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1 Message Filter

This references the content of the incoming text message. The drop down has several options on how this message is received, such as contains, equal to, starts with, etc. You can also select whether the message requires "any" or "all" of the criteria to match for an automatic response. You can add multiple conditions if needed.

2 Response

This is the content of your organization's response, which will be sent if the incoming message meets the filter requirements.

Launch Workflow

As the name implies, this action will launch a workflow. You'll want to configure your workflow to receive information from the pipeline, using the same workflow attribute merge fields we cover in the [Text to Workflow](#) chapter of the [Blasting Off with Workflows](#) guide.

The screenshot shows the 'SMS Pipeline' configuration page. The main area is titled 'Incoming SMS Message' and contains a sequence of actions: 1. Group Response, 2. Connect Response, 3. Launch Workflow (highlighted with an orange border), and 4. SMS Conversations. The 'Launch Workflow' action is expanded to show its configuration options:

- Name:** Launch Workflow
- Active:** **Continue:**
- Filters:**
 - Phone Numbers:**
 - +15556486654 Equal To
 - +15558655645 Equal To
 - +15554934995 Equal To
 - Message:**
 - Any All
 - volunteer, serve Contains
- Workflow:**
 - 1 Workflow Type:** External Inquiry
 - 2 Pass Nameless Person:**
 - 3 Workflow Name Template:** Connection Request
 - 4 Workflow Attributes:**
 - Attribute Key
 - Merge Template

Buttons at the bottom: Save, Cancel, Delete.

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- 1 Workflow Type**
You'll use the drop down to choose your preconfigured workflow.
- 2 Pass Nameless Person**
You can control whether Nameless person records (see Nameless People) should be passed to your Workflow.
- 3 Workflow Name Template**
This Lava-enabled field is where you can create a string to use as the workflow name.
- 4 Workflow Attributes**
You can set Lava-enabled attributes and values for use as a defined type. See the [Text to Workflow](#) chapter in the `Blasting Off with Workflows` user guide for these details.

SMS Pipeline In Action

Let's see how this all works together. In this pipeline below, we have:

- Two auto response actions
- One launch workflow action
- One SMS conversation action

The screenshot displays the 'SMS Pipeline' configuration interface. The pipeline is titled 'SMS Pipeline' and is located under 'Home > Communications > SMS Pipeline'. The pipeline is divided into two main sections: 'Incoming SMS Message' and 'Reply'.

Incoming SMS Message:

1. Group Response (highlighted with an orange box)
2. Connect Response
3. Launch Workflow
4. SMS Conversations

Reply:

Name: Group Response

Active: **Continue:**

Filters:

Phone Numbers:

- +15556486654 Equal To
- +15558655648 Equal To
- +15554934995 Equal To

Message:

group Contains

Response:

Response

Yes, let's get you connected to a group! Click here to find a group near you:

This configuration is relatively straightforward. When an incoming text contains the word 'group', an auto-response will be sent to them with more information about joining a group. In this case the actions stop and wait for the next incoming text.

On the next line, when a message contains the word 'volunteer' or 'serve' an auto response gets sent with more information about getting connected to a serving team. The arrow on the action indicates that the continue functionality is enabled, and the next action will run if the message meets the requirements. Since the message contents

are the same, we know the workflow will launch. And finally, the pipeline continues down to the SMS conversation action so that a receiving staff member can directly connect with this person.

The screenshot displays the 'Launch Workflow' configuration screen within an 'SMS Pipeline'. The pipeline consists of four sequential actions: 1. Incoming SMS Message, 2. Group Response, 3. Connect Response, and 4. Launch Workflow (highlighted with an orange border). The 'Launch Workflow' configuration panel on the right includes the following settings:

- Name:** Launch Workflow
- Active:**
- Continue:**
- Filters:**
 - Phone Numbers:** +15556486654 (Equal To), +15558655645 (Equal To), +15554934995 (Equal To)
 - Message:** volunteer, serve (Contains)
- Workflow:**
 - Workflow Type:** External Inquiry
 - Pass Nameless Person:**
 - Workflow Name Template:** Connection Request
 - Workflow Attributes:** Attribute Key, Merge Template

Buttons for Save, Cancel, and Delete are located at the bottom of the configuration panel.

With all that said, when someone sends a message that doesn't match the keyword filters, the message will land on the SMS conversations action where a staff member can have a text-to-text conversation.

Configuring Twilio

SMS Webhook

To set your number up for the SMS pipeline, use the *A Message Comes In* URL
<https://-YourServer-/Webhooks/TwilioSMS.ashx>

Configuring Email

Out of the box, the email communication medium is configured to use the SMTP transport. You'll want to be sure that your mail server settings are all correctly configured under:

`Admin Tools > Communications > Communication Transports > SMTP`.

SMTP Relaying May Bite You

If you decide to use SMTP as your transport be sure that the server/service you use is configured to allow the Rock server to relay. If you're using Google Apps see the tips in the Integrations section below.

Broken Images?

If you're finding that some of your images appear as broken links in your email, be sure your *Public Application Root* organization setting is set to the proper URL.

This can be modified under:

`Admin Tools > General Settings > Global Attributes > Public Application Root`.

There are several other settings that you should be aware of. While most are preconfigured to best practices, it's good to know that they exist.

Unsubscribe HTML

If you'd like to change the HTML that is displayed at the bottom of all bulk emails you can do so under:

`Admin Tools > Communications > Communication Mediums > Email`.

The default is to display a small *Unsubscribe* link at the bottom right of the email.

Mailgun Unsubscribe

To avoid having two *Unsubscribe* options at the bottom of your emails, be sure to check that your Tracking Settings in Mailgun itself are turned off.

Default Plain-text

If you do not provide a plain-text message, the recipient will see a generic message with

a link to view the rich text email on your website. The contents of this generic message can be configured under:

[Admin Tools > Communications > Communication Mediums > Email](#) .

The default message is:

Unfortunately, you cannot view the contents of this email as it contains formatting that is not supported by your email client.
You can view an online version of this email here:
<link to page>

Safe Sender Domains

Many email service providers have implemented new restrictive policies on emails that are sent from a person's account (e.g., yahoo.com) but did not originate from their email server. Because Rock sends email on behalf of others these emails can bounce in these situations. To prevent this, if an email communication is created with a From Address that is not in the *Safe Sender Domains* defined type, the *Organization Email* global attribute value will be used instead for the *From Address* and the original value will be used as the *Reply To* address.

You'll want to add all of your organization's email domains to the *Safe Sender Domains* defined type under:

[Admin Tools > Communications > Safe Sender Domains](#) .

Communication Lists

The Communication Wizard utilizes communication lists to send messages.

Communication lists are kind of like the contact lists or groups you can set up in your own email and messaging apps. Rock's communication lists are simply groups of a specific type. For example, you could create a communication list of all small group members, or everyone registered for summer camp, or anyone serving as an usher. If you can create a group of it, you can create a communication list from it. Using groups as the basis for lists allows you to quickly identify and select recipients from the different areas of your organization.

Communications lists can be found in the *Communication Lists* screen, located at:

[Admin Tools](#) > [Communications](#) > [Communication Lists](#) .

Click the name of a list to view its members or modify its settings.

Communication Lists

Home > Communications > Communication Lists

| Name | Description | Members | Active | |
|-----------------------|-------------|---------|--------|--|
| Members and Attendees | | 0 | ✓ | |
| Parents of Children | | 0 | ✓ | |
| Parents of Youth | | 0 | ✓ | |
| Sports Ministry | | 0 | ✓ | |

50 500 5,000 4 Groups

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Rock ships with the following four lists:

- Members and Attendees

- Parents of Children
- Parents of Youth
- Sports Ministry

These lists are just samples to get your juices flowing and so you can see how lists should be configured. You can use them for your organization if you want, but you'll need to wire them up to sync with your data views. Because these lists are groups, you can add people to them manually...*or* you can use Rocks' group sync features to keep them automatically updated. To learn more, see the [Group Sync](#) chapter in the [Rock Your Groups](#) guide.

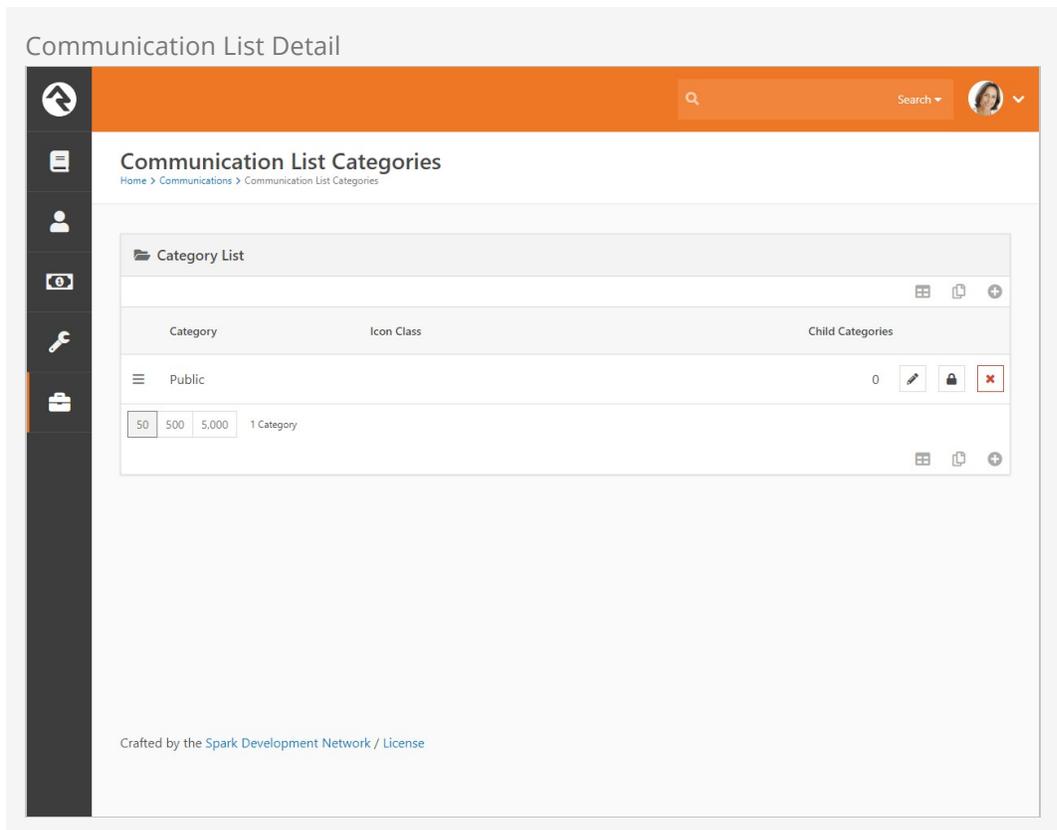
You can also create your own communication lists. In the *Communication Lists* screen, click the **+** button to create a new list.

As you can see, the *Communication List Detail* screen offers a lot of options and flexibility for creating your communication list. To make your new list available to members viewing the *Communication List Subscribe* block on your external site, be sure to click the *Public* checkbox. (To learn more about that block, see the [Communication Preferences](#) section below.)

Next let's look at how to associate the list with categories and data views.

Communication List Categories

You can create categories to further identify and filter your communication lists. The



Rock ships with one category, called "Public", but you can create as many categories as you want. For example, you could create a category called "Staff Only" to use when creating communication subscription blocks you want only to be available to staff members. Categories can have child categories as well. You can use communication list categories in a number of ways: for paring down the recipients in your communication lists, in creating subscribe/unsubscribe blocks in your organization's website, for creating data views to use when filtering communication lists... The more you use them, the more you're going to see how extensive they are. We'll be talking about communication list categories a little later in the *Communication Preferences* chapter.

Segments

Segments provide a way to select and filter your lists based on any field in the system. You can use data views to further pare down, or segment, who you're communicating with in a particular list. They can be global to all lists or unique to a specific list. When using the Communication Wizard, after selecting a communication list, you can add any segments you want to use to filter that list. For example, if you only want the communication to be sent to members who are age 35 or older, you'd select the segments "Members" and "35 and Older". (More on that in the next section.)

It's important that you think through your list strategy. A smart use of segments can cut down on the number of lists you will need.

Data views can be created, modified and deleted in the *Communications Segments* category of the *Data Views* screen, located at [People > Data Views](#) . For more information

about data views, see the Filtering Using Data Views section of the [Taking Off with Reporting manual](#) .

OK, now for the fun part. Let's look at how to actually use the Communication Wizard.

Communication Wizard

Rock's Communication Wizard works like other wizard models, with buttons that move you forward and backward through a series of screens. Let's walk through how to use the wizard to send a communication.

Sending a Communication Using the Communication Wizard

To begin a new communication, go to `People > New Communication`.

Recipient Selection

New Communication

Home > New Communication

New Communication Use Simple Editor

Recipient Selection

Specific Individuals **List** View List

List *

Segments

Optionally, further refine your recipients by filtering by segment.

35 and older Female Male Under 35

Recipients Must Meet

All segment filters Any segment filters

Next

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The *Recipient Selection* screen is the first screen of the Communication Wizard. Here you select whether the communication will be sent to *Specific Individuals* or to a *List*. If you arrive at this screen from a grid, the *Specific Individuals* tab will automatically be selected.

If you're using a communication list (rather than selecting individual recipients), you can further segment that list by choosing options in the *Segments* section of the screen. Remember, segments are data views that can be modified. Read the *Communications Lists* section above to learn more.

After adding at least one individual, or after identifying the *List* you'll be using, you can

view the intended recipients by clicking the [View List](#) button.

Click [Next](#) to advance to the *Communication Delivery* screen.

Wait! I want to go back!

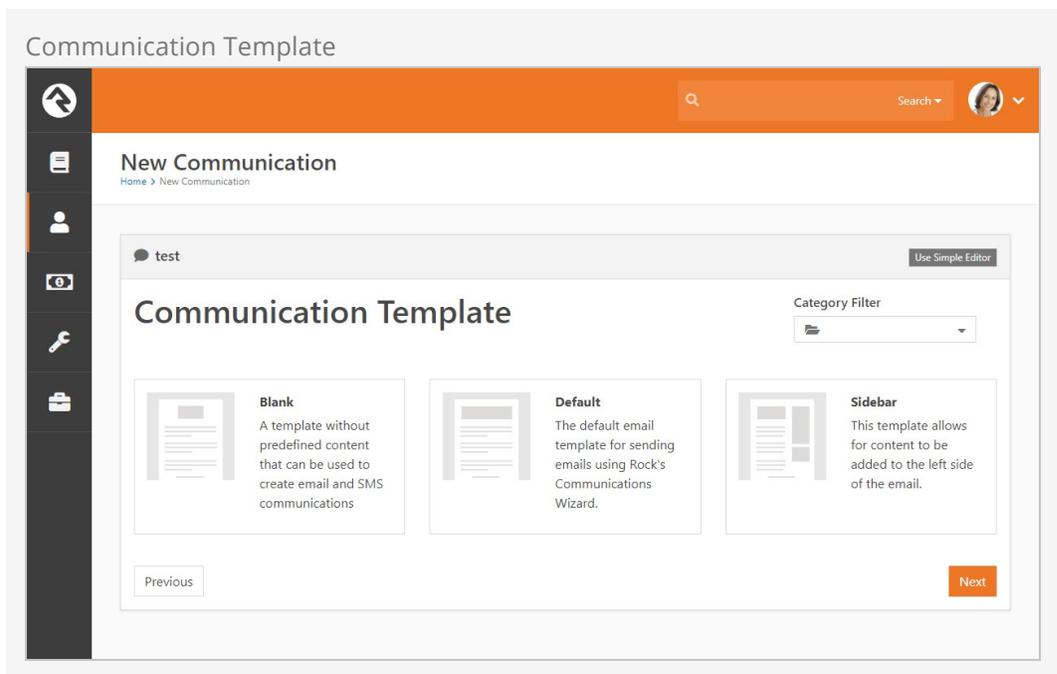
If at any point you want to return to a previous screen, click the [Previous](#) button.

The screenshot shows the 'Communication Delivery' screen. At the top, there's a navigation bar with a search icon and a user profile. Below that, the page title is 'New Communication'. The main content area is titled 'Communication Delivery' and contains several form elements: a 'Communication Name' input field, a 'Is The Communication Bulk' toggle (set to 'No'), and tabs for 'Recipient Preference', 'Email', and 'SMS'. Below these are options for 'When should the communication be sent?' with 'Send Immediately' selected. At the bottom, there are 'Previous' and 'Next' buttons.

The *Communication Delivery* screen is where you specify how and when to send the communication. If you want Rock to decide which format to send to a recipient based on their communication preference, select the *Recipient Preference* tab. Otherwise, you can choose whether to send the communication by email or SMS. You can also choose whether to send the communication immediately or set a later date and time to send it.

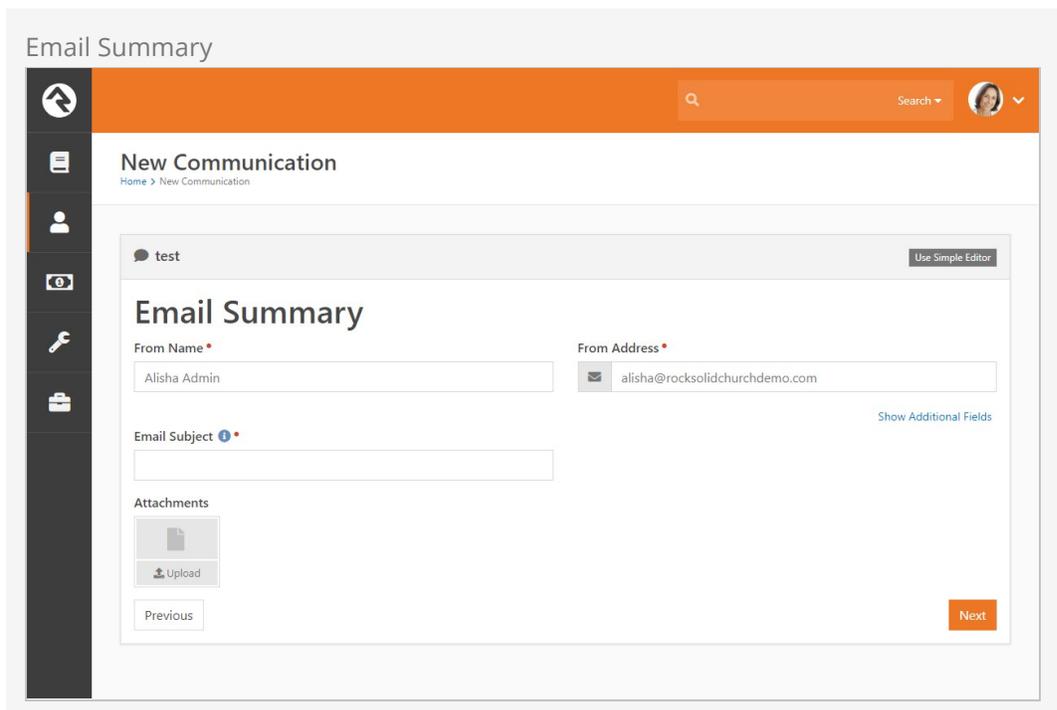
Note the *Is The Communication Bulk* toggle. Here is where you designate whether or not you're sending a bulk (or group) communication. When you select "Yes", Rock automatically includes a link for the recipient to unsubscribe from the list associated with the communication. You can change the default for this option in the block settings.

Click [Next](#) to advance to the *Communication Template* screen.



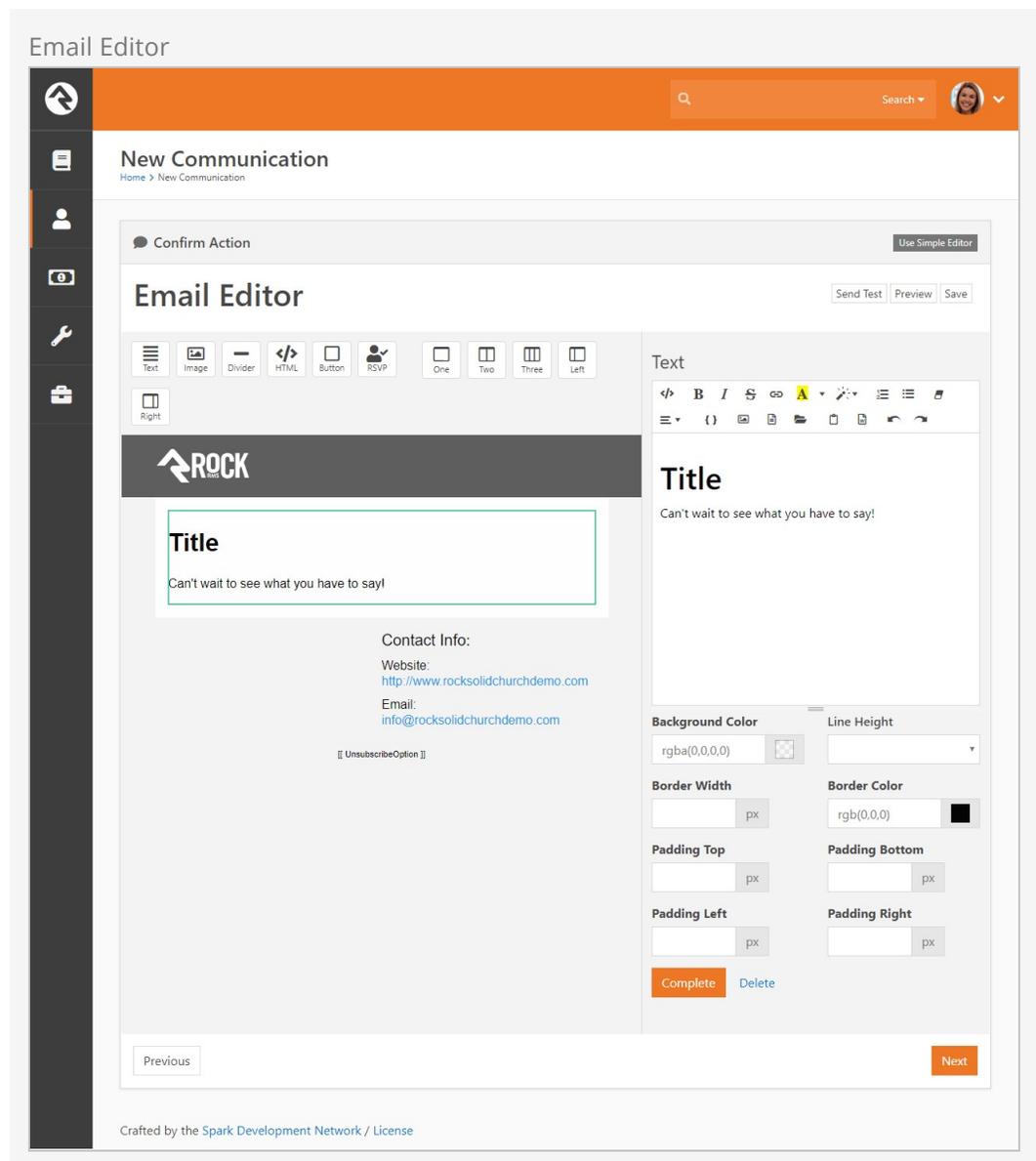
Now it's time to select the template you want to use to create your communication. You can imagine how, after you've created a number of templates, having a *Template Image Preview* (i.e., thumbnail) will help you easily locate the template you want. You can also use the *Category Filter* dropdown to help you locate your template. If you don't see a template listed, you may not have permission to use it, or it might not be set up for use with the wizard. You can learn more about template security and support in the [Email Template Survival Guide](#).

After selecting your template, click [Next](#) to advance to the *Email Summary* screen.



The *Email Summary* screen is where you specify the sender, the sender email address, the subject, and any files you want to attach to the message. Click *Show Additional Fields* to also specify a reply-to address, CC list, and BCC list.

Click **Next** to advance to the *Email Editor*. (Note: if your communication will be sent by SMS only, the wizard will skip this screen.)



Here's where things get really fun. The *Email Editor* is a drag-and-drop visual email composer. This is where you configure the layout, images, text, buttons, etc., of your communication.

To add an element, simply drag it from the buttons bar to where you want it to be in your message. Notice that when you drag an element over a section, that section lights up with a yellow border. A transparent image of the element also helps to show where you're placing it.

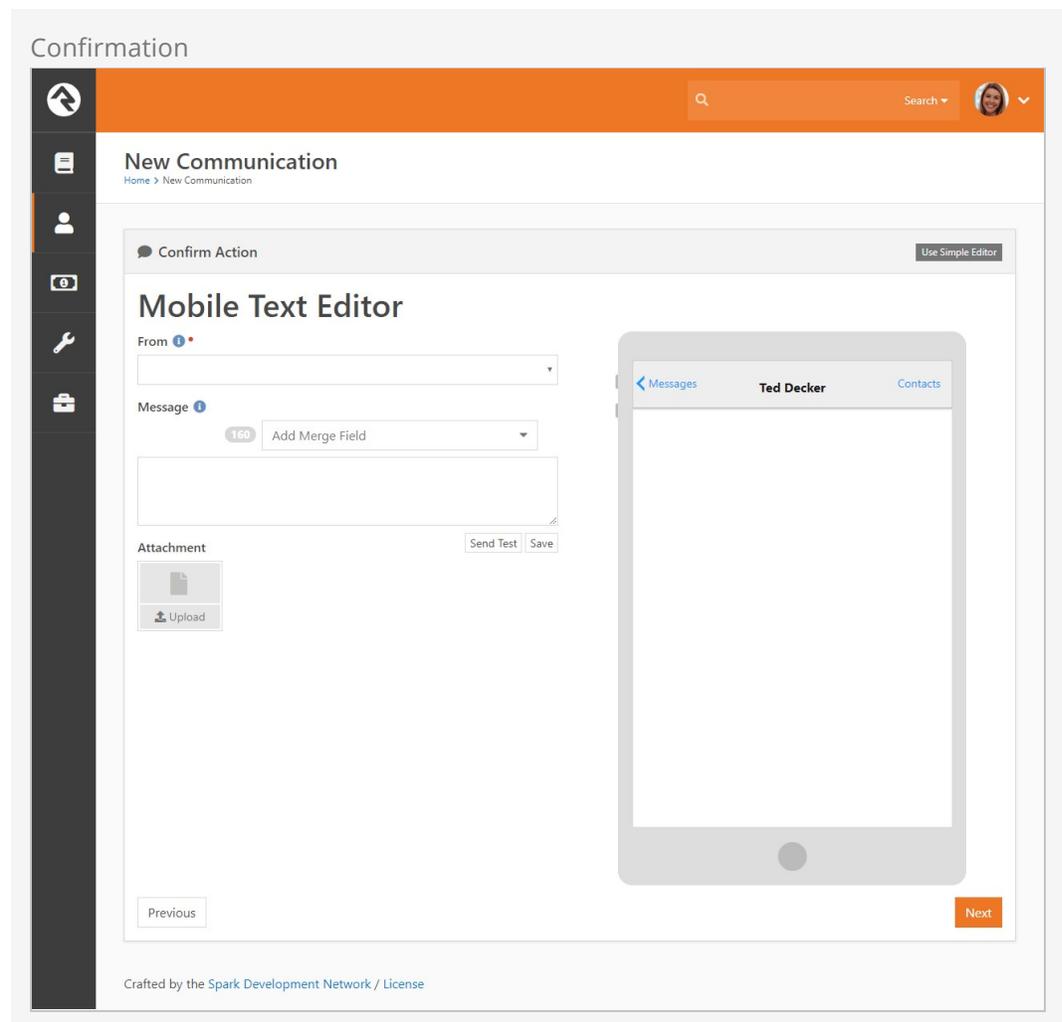
After placing an element, you can edit it by clicking on the section it's in. The options

associated with that element are displayed on the right side of the screen. Notice that the section you're editing is highlighted with a red border, and you can view your changes in real time. When you're done editing the section, click **Complete**. If you decide you don't want that element after all, click **Delete**.

At any point while working in the Email Editor, you can send a test email to yourself by clicking the **Send Test** button. Click **Preview** to see both desktop and mobile previews of your design. Click **Save** to save a draft of your email.

We should pause a moment here to note the RSVP button, indicated by the icon. This element is used to send RSVP requests to groups, and it requires some setup in advance. For full details check out the [Group RSVP](#) section of the [Rock Your Groups](#) guide.

When everything is set up and looks the way you want, click **Next** to go to the *Mobile Text Editor* screen. (Note: if your communication will be sent by Email only, the wizard will skip this screen.)

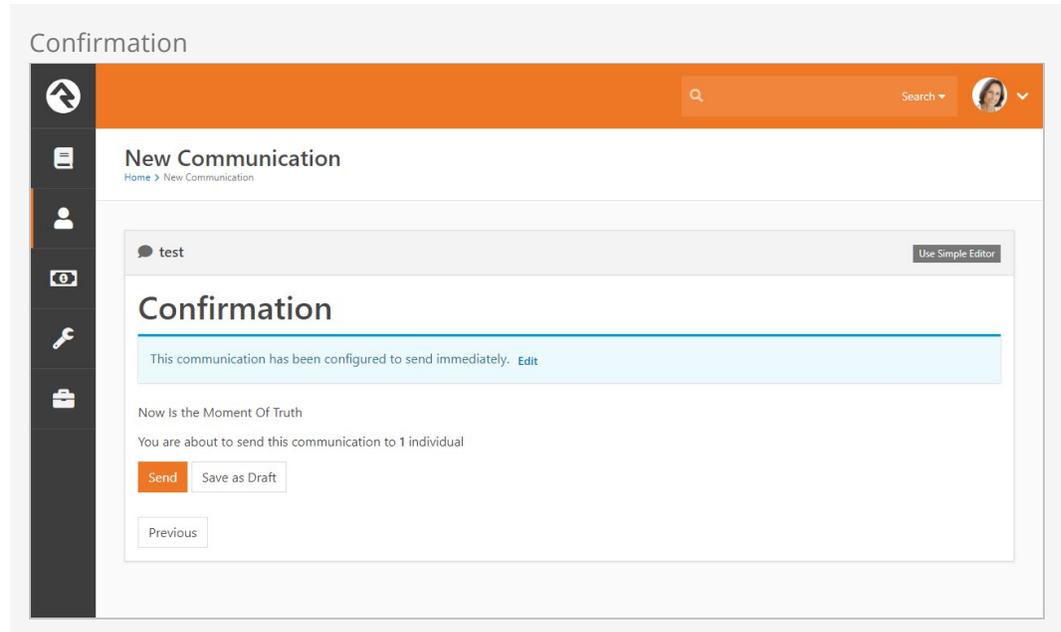


The *Mobile Text Editor* is similar to the *Email Editor*. This is where you design how your SMS message will appear. On the right side of the screen you can see a preview of how your message will look. You can incorporate merge fields and images to personalize and

customize your message.

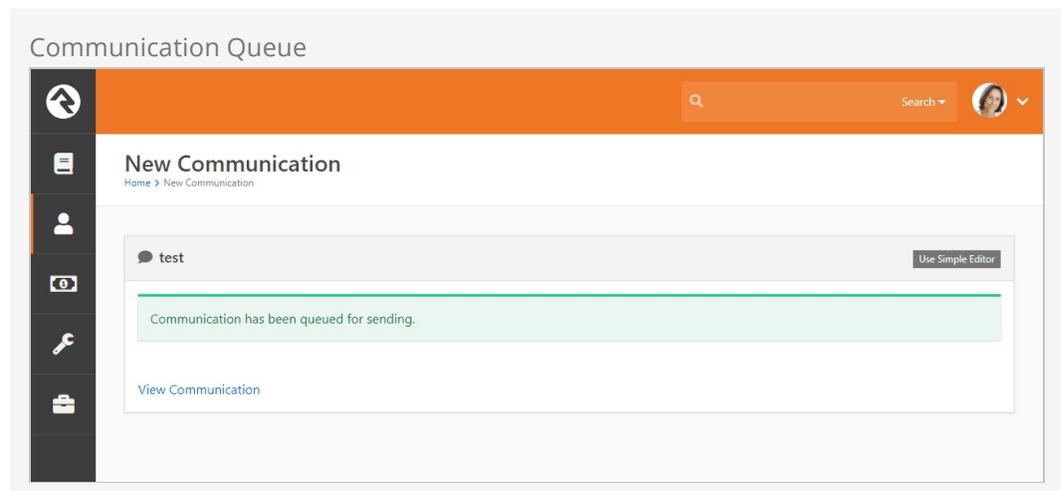
You can also send a test text to yourself by clicking the `Send Test` button. Click the `Save` button to save a draft of your text.

When finished setting up the mobile version, click `Next` to go to the *Confirmation* screen.



This is the Moment of Truth. Are you ready to send the email? If so, click `Send`. If you're not quite ready, you can save your communication for later by clicking `Save Draft`. Your communication drafts are located in the *Communication History* screen. You also have the option of changing your communication delivery time in this screen. Click *Edit* in the blue alert message to change your delivery options.

After clicking `Send`, the communication is sent to the communication queue.



To immediately view the communication's analytics, click the *View Communication* link. See *Communication Analytics* to learn more.

To turn around and send the same communication to a different list, click the *Copy Communication* link. This will take you back to the beginning of the Communication Wizard, keeping the settings and design options of the original communication.

Pretty cool, right? With the Communication Wizard, you're going to be rocking email and SMS messages in no time.

Simple Email Editor

Rock's previous, non-wizard communication system (aka, Simple Email Editor) is still available. You may find it useful for volunteers to use to send individual or simple communications. Here's what you should know about using the Simple Email Editor.

Sending a Communication Using the Simple Email Editor

There are a lot of ways to start a new communication. The most popular one is to click the  button at the bottom of any grid of people. This will take you to the *New Communications* page and add all of the individuals from the grid to the communication as recipients. This is really powerful when used with Data Views and groups pages. If you prefer you can also start a new communication from `People > New Communication` and enter your recipients by hand.

Tip: Hide the New Communications Button

If a person does not have view access to the *New Communications* page the button at the bottom of the grid will be hidden.

Once on the *New Communications* page, you're ready to start crafting your message. We'll walk through each section of this page highlighting some of the features you have at your disposal.

New Communication

1 Selector

Email is the default communication medium, but this can be updated from the communication selector at the top of the page.

2 Recipients

The recipient list will be filled with all of the people you previously selected as recipients. You can also add and/or remove names from the list at this point. Don't forget that if you started with a blank communication you'll need to enter all of the names manually. You may notice that some names

are in red. These names either do not have an email address or have been marked as not wanting emails or bulk emails.

3 Bulk Option

Determine if this message should be treated as a bulk email. Bulk emails will have the unsubscribe link added to them. They will also not be sent to people who have asked that they not receive bulk emails from your organization.

4 Template

If you would like to use a previously created email template you can select it here. For more information on creating templates see the [Email Template Survival Guide](#). This page can be set with a default template. Out-of-the-box this will show your organization's header and footer with the sender's signature.

5 From

Fill in the email address that you would like the email to be sent from. By default, your contact information will be input, but you can change this as needed.

6 Reply to Email

You might want replies to go to a different address than the one you're sending from. For example, when you send emails from the organization's leader, you may want the replies to go to an administrative assistant.

7 Attachments

You can add any number of attachments you want to the email. Why limit a good thing?

8 Subject

Next, enter the subject of your email. A well-written subject can greatly increase the response rate of the email. Here are a few tips: provide context for the content of the message and a hint about the organization sending it. Remember to focus on catching the eye of the reader. You can use Lava merge fields in your subject line so by all means, be creative.

9 The Message

Now the fun part: your message. While you can enter any generic message in this box, consider personalizing your message using merge fields. The message editor has a button `{}` for selecting a merge field to add. Personalization is one of Rock's main strengths so be sure to use it to its fullest.

10 Delay Send

If you'd like you can delay the sending of your message to a date and time in the future. What a timesaver!

11 Test

Before sending the email it's wise to send a test. Using the `Test` button will send the contents of the email to the currently logged in user. The first recipient will be used to process any merge fields in the email.

12 Draft

Finally, you can send the communication or save it as a draft to be completed later. This draft will be available to complete from `Tools > Communication History`. Take the time to get it right!

Resolving Relative Links

By default Rock will convert relative URLs in links and images to absolute URLs using the *Public Application Root* global attribute.

Approvals

As your organization grows, you'll find an increasing number of people sending large emails. Chances are good that not all of them understand the intricacies of your communications strategies. Rock has just the thing to help you maintain quality in growth – approval settings for emails that are sent to a large number of people. The default threshold of recipients is 300. This number can be changed by configuring the block settings of the *Communications* block.

When an email is sent that requires approval, the status will be set to *Pending Approval* and members of the *RSR - Communication Approvers* group will receive an email. Note that this is the only group that will receive the approval emails.

A communication will not be sent until it is approved by either a person with approval access, by default these are the *RSR - Communication Administration* and *RSR - Communication Approvers* roles. Before a communication is approved these roles have the ability to edit the communication to ensure it meets the standards of your organization.

Any individual with approval access can view a complete list of communications waiting for approval from the *Communication History* page. The filters on the *Communications List* block allows approvers to view communications from anyone in Rock with additional filters for status.

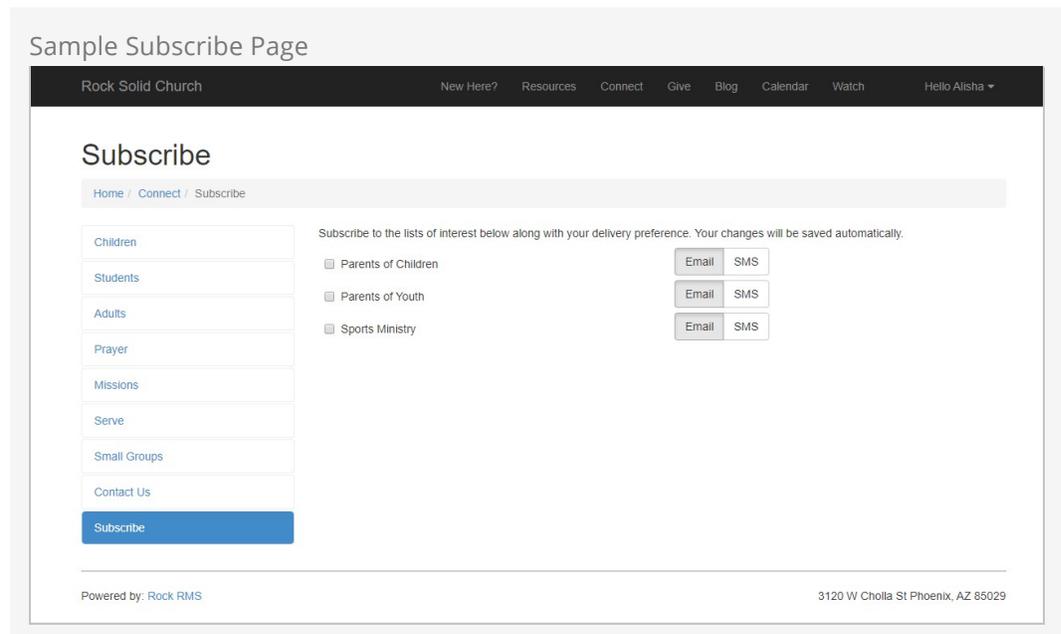
Additional security roles can be added to approve communications by adjusting the block security of the *Communication* block. Simply add them to the *Approve* permission of this block.

Communication Preferences

Rock's communication tools provide powerful functionality not only to senders but also those receiving communications. Recipients can control not only which communications they receive but also how they receive them. Let's look at how Rock handles communication preferences.

Communication List Subscribe Block

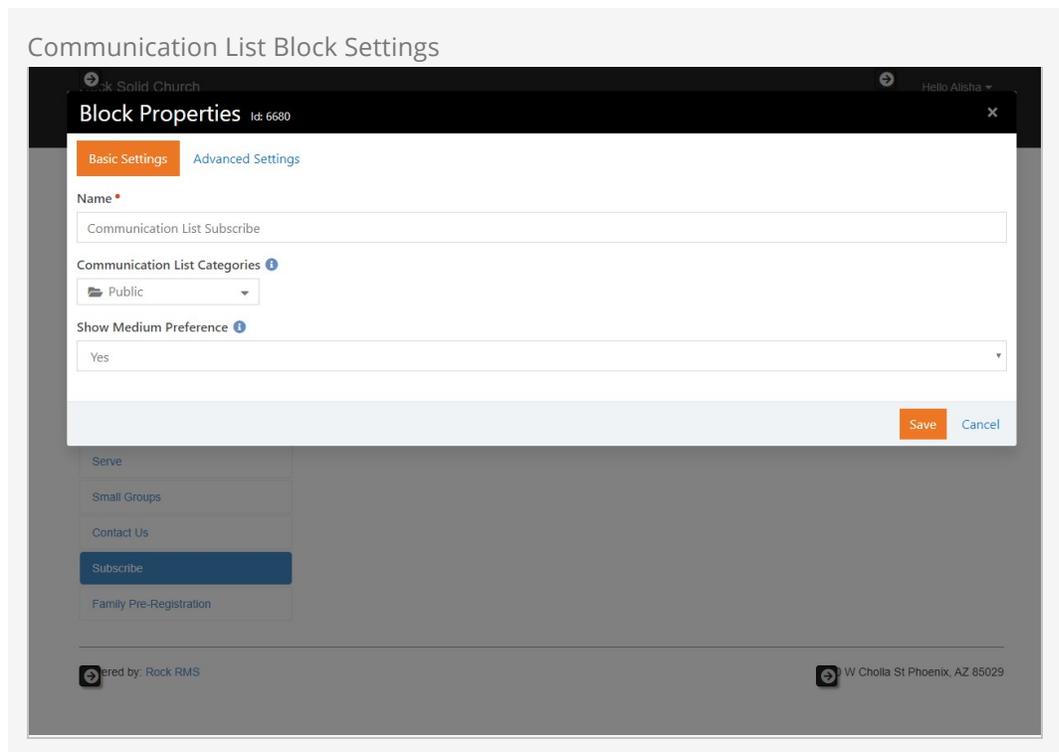
Rock ships with the *Communication List Subscribe* block ready for you to use in both your internal and external sites. You can view the block's details in the *Block Type Detail* screen located at [Admin Tools > CMS Configuration > Block Types](#). When placed on a page of your site, this block will display the communication lists a person is subscribed to. For example, here's how the block might look on a Subscribe page of an organization's external site.



In this example, the block shows the three communication lists that ship with Rock: Parents of Children, Parents of Youth and Sports Ministry. If a person were subscribed to additional lists unique to your organization, they would be displayed here as well.

You can further configure the *Communication List Subscribe* block in the block settings. This is one area where Communication List Categories come into play. You can specify a category in the block settings if you want the *Communication List Subscribe* block to

target only a particular segment of the communication lists.



Here you can see the block settings of the *Communication List Subscribe* block of that same *Subscribe* page. The *Communication List Categories* dropdown shows the available categories. Remember, the "Public" category ships with Rock, but you can create as many categories as you want. Whichever categories you select here will affect the functionality of the *Communication List Subscribe* block. For example, you could select Staff Only to display lists only available to staff members. If you don't select a category, Rock will display all of the lists the person is authorized to view.

Now let's look at how a person interacts with the *Communication List Subscribe* block to set their communication preferences.

Setting Subscription Preferences

There are two ways a person can access and set their communication preferences: by logging in and navigating to a subscribe page, or by clicking an unsubscribe link that takes them to an email preferences page. Let's look at the subscribe page option first.

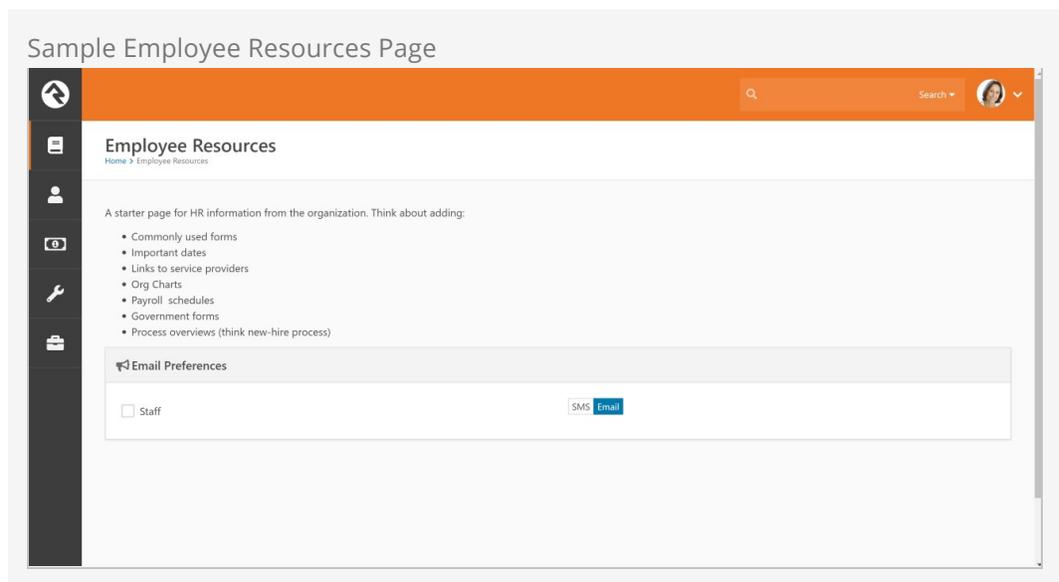
Setting Preferences in a Subscribe Page

When a person logs in, the *Communication List Subscribe* block is made available for them to set their communication preferences. If that block is placed on a *Subscribe* page, as shown in the earlier screenshot, they can select which lists they want to subscribe to, and choose which format they want the messages they receive to be in. To subscribe to a list, simply check the box beside the list's name. To unsubscribe, uncheck the box. To set a delivery preference, simply click which you want to receive: email or SMS. Super easy, right?

Communication Wizard and Delivery Preference

The Communication Wizard uses the preferences set using the the *Communication List Subscribe* block. So, when sending a communication using the wizard, if you choose the *Recipient Preference* option in the *Communication Delivery* screen, the wizard will check which preferences a person has set and send the communication accordingly.

The *Communication List Subscribe* block works the same way for the internal pages of your organization's site as well. You can create subscribe pages available only to staff members or others where they can set their communication preferences. For example, you can set up an employee resources page with an email preferences zone containing the *Communication List Subscribe* block.



Setting Preferences from an Unsubscribe Link

The other way a person can access and set their communication preferences is by clicking on an unsubscribe link in an email or SMS message.

The US government's CAN-SPAM act requires that all "bulk" emails have an unsubscribe link. Rock automates the insertion and processing of these links for you. Here are a few things you'll need to know about how this process works.

- When you send a bulk communication using the communication wizard, Rock automatically includes an unsubscribe link in your message, but you can place the unsubscribe link anywhere by using the merge field: `[[UnsubscribeOption]]`.
- If you do not provide this merge field when using the Simple Email Editor, the link will be added for you at the bottom of your email (*evil laugh*).
- You can modify the format and destination of this link on the *Email Medium*

`Admin Tools > Communications > Communication Mediums > Email`.

If you blank out this field, then no link will be added to your message. Think about it before you simply delete it. Friendly senders should provide a way to opt-out of

messages.

Below is a view of the page that is displayed when someone clicks an unsubscribe link.

Unsubscribe Page

Rock Solid Church New Here? Resources Connect Give Blog Calendar Hello Alisha ▾

Email Preference

Home / Email Preference

Which option best describes how you would like us to update your email preference?

- I am still involved with Rock Solid Church, and wish to receive all emails.
- I am still involved with Rock Solid Church, but do not wish to receive mass emails (personal emails are fine).
- I am still involved with Rock Solid Church, but do not want to receive emails of ANY kind.
- I am no longer involved with Rock Solid Church.

[Submit](#)

Powered by: Rock RMS 3120 W Cholla St Phoenix, AZ 85029

The unsubscribe block on this page allows you to customize the wording for each of the options on the page. If you want to add more reasons for the "I no longer attend" option, you can do that under

[Admin Tools > General Settings > Defined Types > Inactive Record Reason](#) .

The block also allows you to suppress any reasons that might be awkward in this context (e.g., *Deceased, No Activity*).

Here's a quick overview of each of these options is below:

- **I'm still involved and wish to receive all emails.** This doesn't unsubscribe them from anything. In fact, if they had currently unsubscribed, it would undo that preference.
- **I'm still involved but don't want to receive mass emails.** This will keep the email address active in the system but will remove them from receiving bulk emails.
- **I'm still involved but don't want to receive any emails.** This will inactive a person's email address inside Rock. You will still be able to see their address but they will not receive any emails.
- **I'm no longer involved.** This will inactivate the person's record in the database. They will be asked to select a reason and have the option of providing more information.

[A Note About the Email Preference Page](#)

If a person is logged in when they view the *Email Preference* page, any communication lists they're subscribed to will be displayed beneath the first "I am still involved...and wish to receive all emails" item.

Communication History and Analytics

Communication History

You can view a history of the communications you've sent under [People > Communication History](#). The list of communications can be filtered based on a variety of data elements, like type, status, content, etc.

The screenshot displays the 'Communication History' interface. At the top, there is a navigation bar with a search icon and a user profile. Below this, the page title 'Communication History' is shown with a breadcrumb trail 'Home > Communication History'. The main content area is titled 'Communication List' and features a 'Filter Options' section with the following filters:

- Subject: [Text input field]
- Communication Type: [Dropdown menu]
- Status: [Dropdown menu]
- Created By: [User selection dropdown]
- Created Date Range: [Date range selector with calendar icons]
- Sent Date Range: [Date range selector with calendar icons]
- Content: [Text input field]

An 'Apply Filter' button is located below the filters. Below the filter section is a table with the following columns: Subject, Status, Details, Sent, and Recipients. The table contains three rows of communication data:

| Subject | Status | Details | Sent | Recipients |
|------------------------------------|----------|--|--|------------|
| Join us for the New Year! | Approved | Created on 1/23/2020 by Ted Decker Reviewed on 1/23/2020 by Alisha Marble | Future 1/31/2020 12:00 PM | 1402 |
| FREE Date Night Event This Weekend | Approved | Created on 1/14/2020 by Ted Decker Reviewed on 1/14/2020 by Alisha Marble | 1/15/2020 11:01 AM | 108 364 31 |
| Youth Ministry Notification | Approved | Created on 1/6/2020 by Alisha Marble Reviewed on 1/6/2020 by Ted Decker | 1/6/2020 2:15 PM | 250 361 1 |

See the Bigger Picture

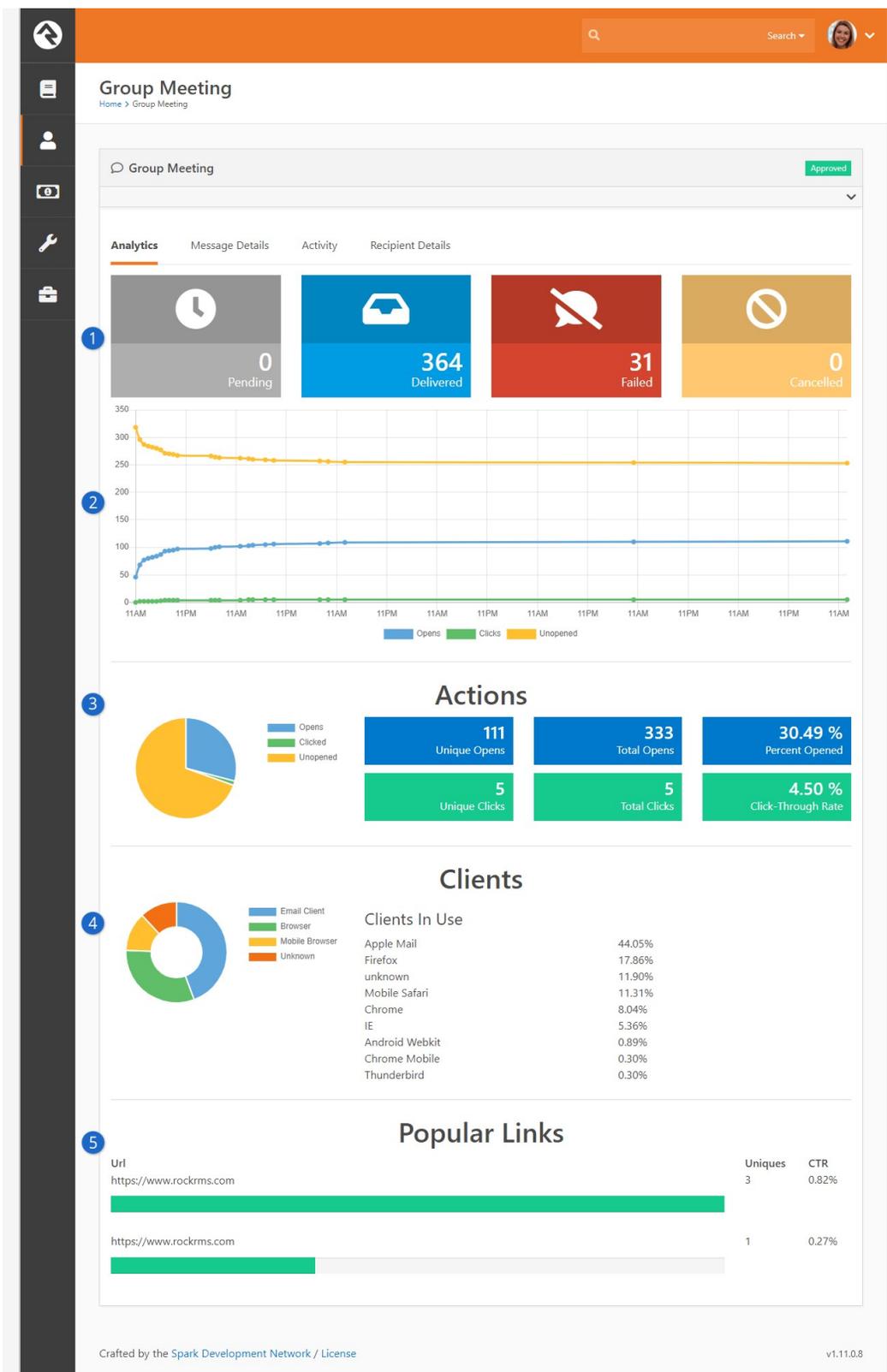
Those with Administrate permissions on this block will be able to see every communication in the system and can filter by a specific person.

Viewing Analytics

When you click a communication from the *Communication History* list, Rock displays a page showing the status of the message along with any analytics that are available. This is where using one of the email service integrations like Mailgun can provide a ton of value.

With services like Mailgun you can see how many people have opened your message and even which links they've clicked. This gives you a much broader understanding of how well your message was received and what calls to action were engaged. To learn more about Mailgun, see the Integrations chapter below.

Communication Analytics



1 Status States

Analytics are shown for each state that a message could be in. The number and types of states is dependent on the transport that you used. The states pictured above include:

- **Pending** - The communication has been saved or queued but hasn't been sent yet.

- **Delivered** - The communication has been sent to the appropriate destination server. For email communications this does not mean that it necessarily reached the person's inbox, just that it made it to the recipient's email server.
- **Failed** - The communication did not reach the recipient. This could be from a bad email address or a hard bounce.
- **Cancelled** - This state is used when a communication has been cancelled by the sender.

2 Analytic Graph

This graph shows the number of opens, clicks and unopened messages over time. As emails are opened you should expect the number of unopened messages to go down while the number of clicks (hopefully!) goes up.

3 Actions

The *Actions* section gives you lots of information at a glance, making it easy to monitor overall activity.

4 Clients

Services like Mailgun can identify which email clients are being used by recipients to view your email.

5 Popular Links

In addition to knowing the number of clicks, progress bars at the bottom of the page let you know which links are being clicked and how frequently.

Viewing Message Details

This page shows you details related to the communication itself. Reviewing things like the subject of an email or the phone number used to send a text message can be helpful both for sent messages and for future communications that are pending.

Communication History - Message Details

- 1 Created By**
The name of the person who created the communication, and when it was created, will be displayed here.
- 2 Approved By**
After a communication has been approved you can see who approved it and when the approval took place.
- 3 Communication Details**
Specifics about the communication, including the *From Name*, *From Address* and *Subject*, are displayed here for reference. For text messages, the number that was used to send the text will be displayed.
- 4 Message**
The contents of either the email or SMS message will be displayed for reference.
- 5 Originated from this page**
If the communication originated from a list block, such as those associated with data views or small groups, clicking this link will take you to that page.
- 6 Cancel Send**
If the communication is scheduled to go out in the future, you can cancel it from here by clicking this link. This function is not available for communications that have already been sent.
- 7 Copy Communication**

Often times you will want to resend a similar communication. Using the *Copy Communication* link will create a new communication with the exact settings used for the communication being viewed. It's important to note that the recipient list will be exactly the same. If the initial communication was sent from a dynamic list of people (like a Data View) it will not re-run the list.

Viewing Activity

This area lists activities for the communication. Depending on the transport used, you can see every time the message was opened by a recipient and every link inside the communication that was clicked.

Communication History - Activity

Financial Planning

Home > Financial Planning

Financial Planning Approved

Analytics Message Details **Activity** Recipient Details

| 1 Date | 2 Person | 3 Activity | 4 Details |
|------------------|-----------------------------|------------|---|
| 1/8/2020 8:01 AM | Sarah Kitt | Opened | Opened from 55.155.255.155 using OS X desktop Apple Mail email client |
| 1/8/2020 8:02 AM | Sarah Kitt | Click | Clicked the address http://www.rockrms.com/ from 75.155.255.155 using OS X desktop Chrome browser |
| 1/8/2020 9:31 AM | Daniel Peak | Opened | Opened from 55.255.255.55 using iOS mobile Mobile Safari mobile browser |
| 1/8/2020 9:33 AM | Sam Hanks | Opened | Opened from 155.55.95.155 using iOS mobile Mobile Safari mobile browser |

- 1 Date**

The date and time on which the activity occurred are displayed for reference.
- 2 Person**

The person who took the action is provided as a link that takes you to their *Person Profile* page.
- 3 Activity**

The specific action (e.g. Opened, Click) that the person performed is shown here. You can sort the list by activity to group actions together.
- 4 Details**

Details related to the activity are displayed here. If the person clicked a link, the link's URL will also be displayed.

Viewing Recipient Details

Details about the individuals who received the email can be viewed here. This is great for accessing and analyzing easily customizable sets of information about communication recipients.

Communication History - Recipient Details

Financial Planning

Financial Planning Approved

Analytics Message Details Activity **Recipient Details**

1 Person Properties

Age Connection Status Grade

Age Classification Email Is Deceased

Birthdate Gender Record Status

2 Person Attributes

Organization

Update

Filter Options ^

3 First Name Last Name

Communication Medium

Email

SMS

Delivery Status

Pending

Delivered

Failed

Cancelled

Opened Status

Opened

Not Opened

Clicked Status

Clicked

Not Clicked

Delivery Note

Apply Filter Clear Filter

4

| <input type="checkbox"/> | Name | Status | Medium | Note | Opened | Clicked | Organization |
|--------------------------|-------------|-----------|--------|---|--------|---------|------------------|
| <input type="checkbox"/> | Sarah Kitt | Delivered | Email | Confirmed delivered by Mailgun at 1/15/2020 11:00:30 AM | ✓ | ✓ | Southeast Church |
| <input type="checkbox"/> | Daniel Peak | Failed | Email | Recipient Email Address is not active | | | |
| <input type="checkbox"/> | Sam Hanks | Delivered | Email | Confirmed delivered by Mailgun at 1/15/2020 11:00:09 AM | ✓ | | |
| <input type="checkbox"/> | Pete Foster | Delivered | Email | Confirmed delivered by Mailgun at 1/15/2020 11:00:05 AM | ✓ | ✓ | |
| <input type="checkbox"/> | Helen Evans | Delivered | Email | Confirmed delivered by Mailgun at 1/15/2020 11:00:06 AM | | | |

1 Person Properties

Select one or more person properties and click the button to have those properties displayed in the grid. You can then sort the communication recipients according to the selected properties.

2 Person Attributes

Like the person properties, you can select one or more attributes to display in the grid. From allergies to t-shirt sizes, you can add as many as

you need.

3 Filter Options

You can filter results based on a wide variety of options related to the communication and to the recipient. You can even filter by name to view details for an individual or a family.

4 Recipient Detail Information

This area will show the person's name and general information related to the communication itself. As described above, columns can be added according to any properties and/or attributes you've selected.

System Communications

System Communications (formerly known as "System Emails") are communication templates that are used by Rock to send very specific messages. Typically these are automated communications, such as the message someone receives when they've forgotten their password and requested to reset it.

System Communications can be used with either emails or SMS messaging. While Rock sets these up to look professional from the start, you may want to modify them to match your organization's branding. You can edit these communications under [Admin](#)

[Tools](#) > [Communications](#) > [System Communications](#) .

System Emails and System Communications

With the addition of SMS messaging configuration, *System Communications* replaces what was formerly known as *System Emails*. Current versions of Rock will have both areas available, but *System Emails* has been renamed to *System Emails (Legacy)* to help distinguish between the two. If you're using any Rock Shop plugins related to communications, you may need to maintain templates in both places until the plugin can be updated to reference *System Communications* instead of *System Emails*.

Integrations

Email: Mailgun

We've already touched on just how great we think Mailgun is, but let's dig deeper into the benefits of their service.

Note:

We are not in a business partnership with Mailgun, nor do we receive any form of compensation from them. We are just passing along helpful tips about some quality products and services we've discovered along the way. While Rock ships with the Mailgun transport, other integrations and plug-ins may be available in the Rock Shop.

Mailgun is an email delivery service that provides several advanced features. Mailgun is operated by the popular web hosting company Rackspace and is used by numerous online businesses like Stripe, Github, Lyft, Slack and many many more. While Rock can use any SMTP mail server to deliver its emails, we think you'll find that using a service like Mailgun is more than worth the small cost. The main benefits of Mailgun are:

- Improved deliverability of your emails through advanced reputation features like SPF records, domain-keys and reputation monitoring. If all of this sounds greek to you, don't worry, they handle all of the technical details. You just need to know that they know what they're doing so you don't have to. Whew!
- Email analytics that help you keep track of trends. Through Mailgun, Rock can show you how many of your emails made it to their destination and, even more importantly, how many were opened and internal links clicked. All of this happens for you behind the scenes so you can just sit back and view the reports.
- Not all email addresses work. Mailgun can notify you about incorrect email addresses so you can follow up. These bounced emails will be reported and the person's profile will be flagged to show the incorrect address.
- Mailgun also offers to inline your emails for you as you send.

Costs

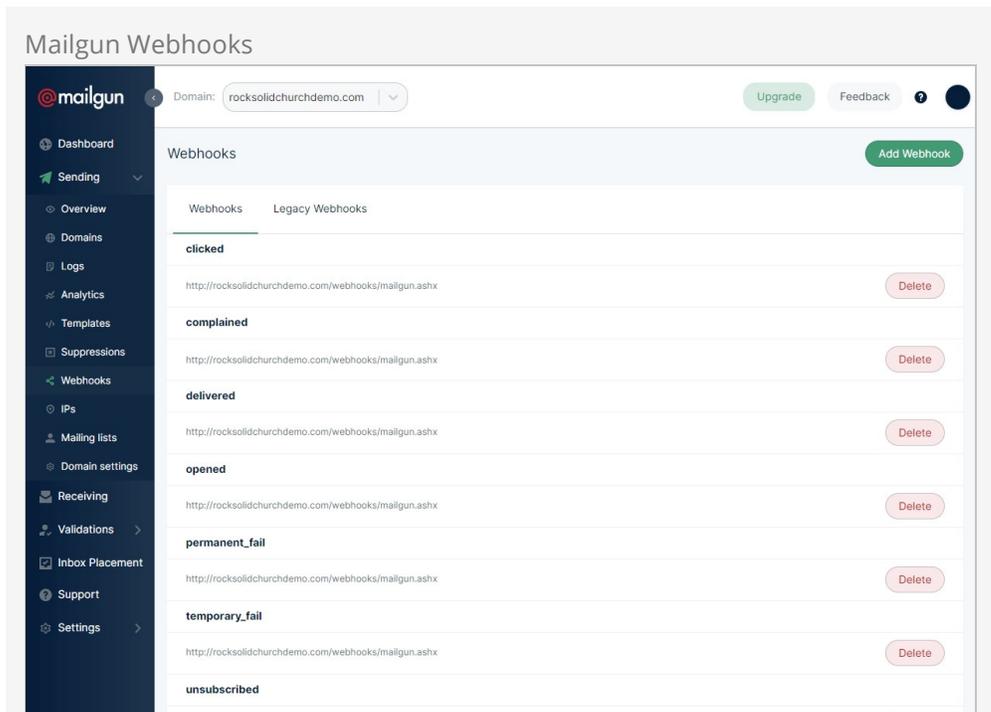
Mailgun has a free starter package that generously gives you 5,000 emails a month for your first three months. After that you can pay by the number of emails you send, or purchase a different plan. In our experience, Mailgun's pricing has been very competitive and their features are among the best in their class.

While the starter package will save you money, keep in mind that you will be given a shared IP address with other organizations. In addition to sharing that IP address, you'll share their reputation, and in some cases, their blacklist. If you find that your emails are not always getting through, or if you want to be on the safe side, you might consider purchasing a plan with a dedicated IP address. And if you've already found yourself on a blacklist, Mailgun has provided [documentation](#) about blacklists and how to follow up with their support in the event that you find yourself on a blacklist.

Setting Up Mailgun

Mailgun has spent time making their service easy to configure. Follow the steps below to enable and configure a new Mailgun account for Rock.

1. Sign up for a new account on the [Mailgun website](#).
2. Setup your domain. Mailgun will walk you through the DNS changes that need to be made to ensure the best delivery and spam protection.
3. Once setup is complete, head to the main Dashboard page in your Mailgun account to start collecting what you'll need to get Mailgun set up with Rock.
 - a. In the box near the bottom-right of the Dashboard page, click on the 'API Keys' link. Note the Private API Key, which can be made fully visible by clicking the eye-shaped icon.
 - b. Next, head back to the Dashboard and scroll the bottom to see a list of your domains. Click the 'Domain settings' link for a domain. On the new page click the 'SMTP Credentials' tab.
 - c. Under the 'SMTP credentials' heading, note the Login and password. You might need to reset the password.
 - d. On the same page, below the Login information, note the value under 'SMTP Settings' (e.g. smtp.mailgun.org).
4. Take a breather! You're almost done... The last step is to configure the webhooks in the Mailgun admin portal. To do this select 'Webhooks' from the navigation and put the following address into all of the events under "Webhooks".
[https://\[yourserver.com\]/webhooks/Mailgun.ashx](https://[yourserver.com]/webhooks/Mailgun.ashx)



Here's what your webhooks screen should look like once you've got it configured in Mailgun.

(Long-time users of Rock and Mailgun may find that Mailgun has automatically migrated their webhooks to the "Legacy Webhooks" section. That configuration will also work for as long as Mailgun supports the legacy format, but presumably Mailgun will discontinue that at some point in the future - so it's probably best to move the addresses to the "Webhooks" section as shown).

5. Let's head back to your Rock server. First, let's enable the Mailgun Transport under

`Admin Tools > Communications > Communication Transports > Mailgun`.

Start by checking the `Active` checkbox. Next provide the values from Step 2 above..

6. Last step and we're done. Now that the email transport is configured, we need to tell Rock to use it for the email medium under

`Admin Tools > Communications > Communication Mediums > Email`.

Select *Mailgun SMTP* under Transport Container.

SMS: Twilio

Twilio is the leading SMS provider. Period. They not only provide the best service but they are also one of the least expensive options available. Again, we don't have a relationship with this organization, but we do know a good thing when we see it! Below are instructions on setting up this service for Rock.

1. From the Twilio website click the sign-up link, then provide your account information. You'll then need to verify that you have a pulse by typing in a verification code they text to you. Finally, select a phone number to tie to your account and proceed to your account information.

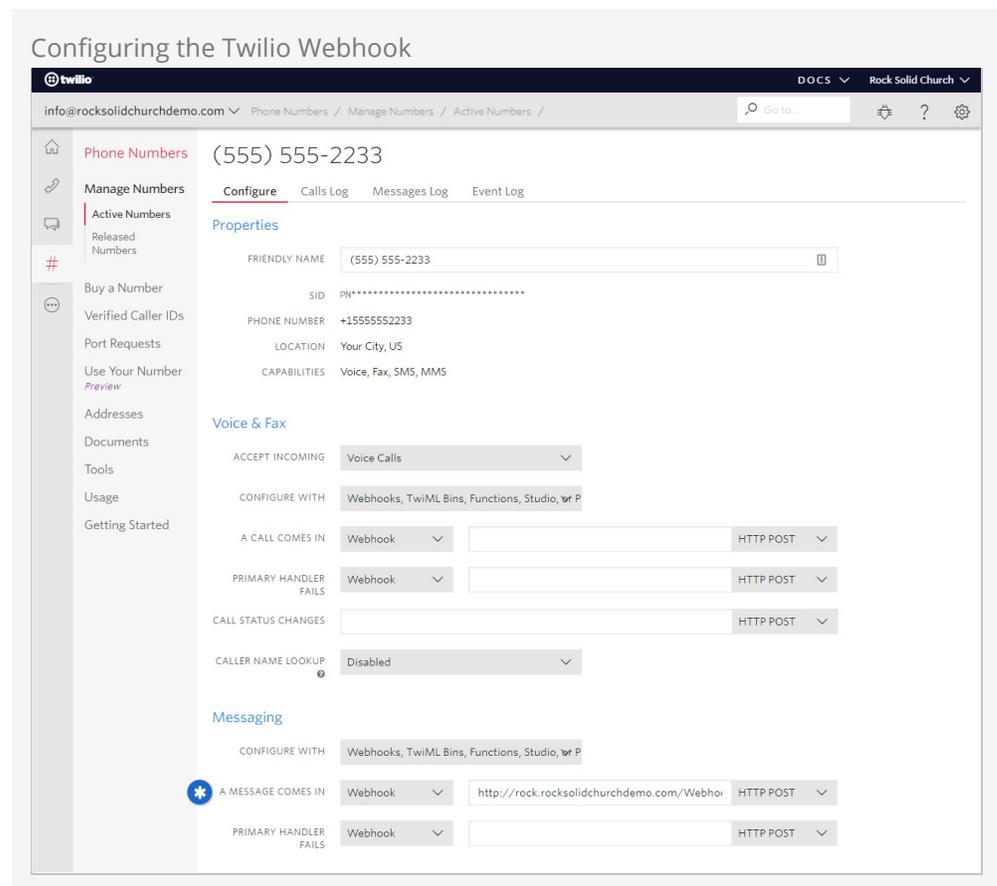
2. On your account page note your *Account SID* and *Auth Token*. You'll need this for Step 4 below.
3. In order to receive replies from your SMS messages you'll need to provide a 'callback' (aka webhook) address for your SMS number. This tells Twilio how to tell Rock when this event occurs. You can set by clicking 'Numbers' from the main menu, selecting the SMS number you wish to configure, then adding the URL format below to the 'Messaging Request URL'.

https://-yourserver-/Webhooks/Twilio.ashx

SMS Pipeline

To set your number up for the SMS pipeline, use the 'Messaging Request URL'

https://-YourServer-/Webhooks/TwilioSMS.ashx



Make It Accessible

It's important that this address be accessible from the Internet so Twilio can access it.

4. Before you can actually use Twilio for real communications, you'll need to upgrade from the free trial.

5. From Rock navigate to

[Admin Tools > Communications > Communication Transports > Twilio](#).

Enter in your *Account SID* and *Auth Token* and activate the transport. Click [Save](#) when done.

6. Next set the Twilio transport as the default transport for the SMS medium under

[Admin Tools > Communications > Communication Mediums > SMS](#).

7. Finally, add your Twilio phone number under

[Admin Tools > Communications > SMS Phone Numbers](#).

You can add as many Twilio numbers here as you wish. Be sure that the phone number is in the *Value* field and that it is in the format of "+15555555555" (or similar for international numbers). You also must set a response recipient to get all of the replies to these numbers. Be sure the individual you select has a valid SMS phone number on their record.

That's it! Now you're set to send SMS messages from the Rock communications features.

Twilio's Impact Access Project for Non-Profit Organizations

Twilio offers a \$500 kickstart credit to non-profit organizations. To learn more, visit www.twilio.org.

Twilio, Short Codes and MMS Messages

If you're using a Twilio short code, keep in mind that it doesn't automatically support MMS messages. You can add MMS capabilities for a one-time fee of \$500. This is different than regular "long codes" (phone numbers) where MMS is usually automatically supported.

If you're not sure whether your account supports MMS messaging, check your Twilio Console. If you only see "Capabilities: SMS" and MMS is not listed then it's likely you haven't purchased MMS for your short code.

Email: Google Apps

This technically isn't an integration as much as tips for configuring SMTP Relaying for Google Apps. The basic steps are covered in this link from Google <https://support.google.com/a/answer/2956491?hl=en>. A couple of tips are below.

- The link above notes you will find the relaying settings under the 'Apps' menu setting. That setting appears to have been moved. Instead search for 'SMTP Relay' in the admin search.
- We've found success with the following Google Relay options.
 1. Allowed Senders: Any Addresses
 2. Authentication: Require SMTP Authentication
 3. Encryption: Require TLS encryption
- On the Rock side use the following SMTP settings.

1. Sever: smtp-relay.gmail.com
2. Port: 587
3. Username: The admin account username
4. Password: The admin account password
5. Use SSL: Yes