



COMMUNICATING

USING ROCK



# 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. We know you have plenty of great things to say, so let's get started right away.

## 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.

## Sending an Email Communication

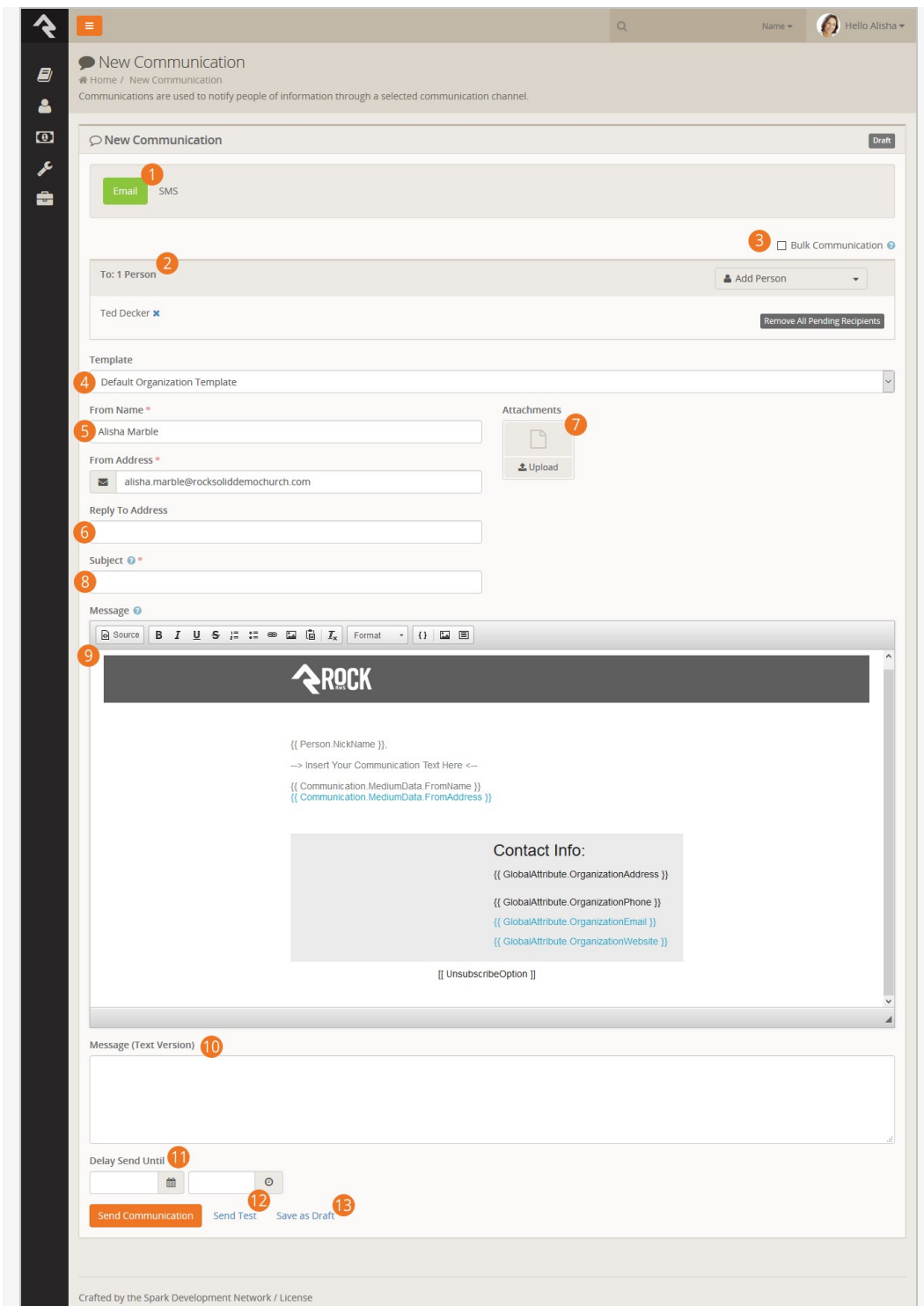
There are a lot of ways to start a new communication. The most popular one is to click the  button at the bottom of any grid of people. This will take you to the *New Communications* page and add all of the individuals from the grid to the communication as recipients. This is really powerful when used 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 Email is the default communication medium, but this can be updated from the communication selector at the top of the page.
- 2 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 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 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 Templates chapter below. 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 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 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 You can add any number of attachments you want to the email. Why limit a good thing?
- 8 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 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 For those with text-based mail clients (sigh), you'll want to provide a simple text version of your message. If you don't, they will see a link to a page that displays the HTML version of the message.
- 11 If you'd like you can delay the sending of your message to a date and time in the future. What a timesaver!
- 12 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.
- 13 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.

## Sending a SMS Communication

Sending a SMS text message is very similar to sending an email. The only difference is that you have fewer fields to enter. You still do have the ability to add merge fields to your messages so make sure to use this powerful feature. You can read more about how Rock's SMS feature works below in the chapter *SMS In Detail*.

## 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 any one 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.

# Under the Hood of Communications

## Mediums and Transports

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

You can 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 ([Admin Tools > System Settings > Jobs Administration > Send Communications](#)) that runs every 10 minutes and looks for communications with a pending status. 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.

## Unsubscribing From Emails

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.

- You can place the unsubscribe link anywhere in your email by using the merge field: `[[ UnsubscribeOption ]]`

- If you do not provide this merge field, the link will be added for you at the bottom of your email .
- 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 will be displayed when someone clicks to unsubscribe.

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. *DeceasedNo 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 inactivate 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.

## 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

While we have already covered how to send a SMS message, the topic of texting deserves more attention.

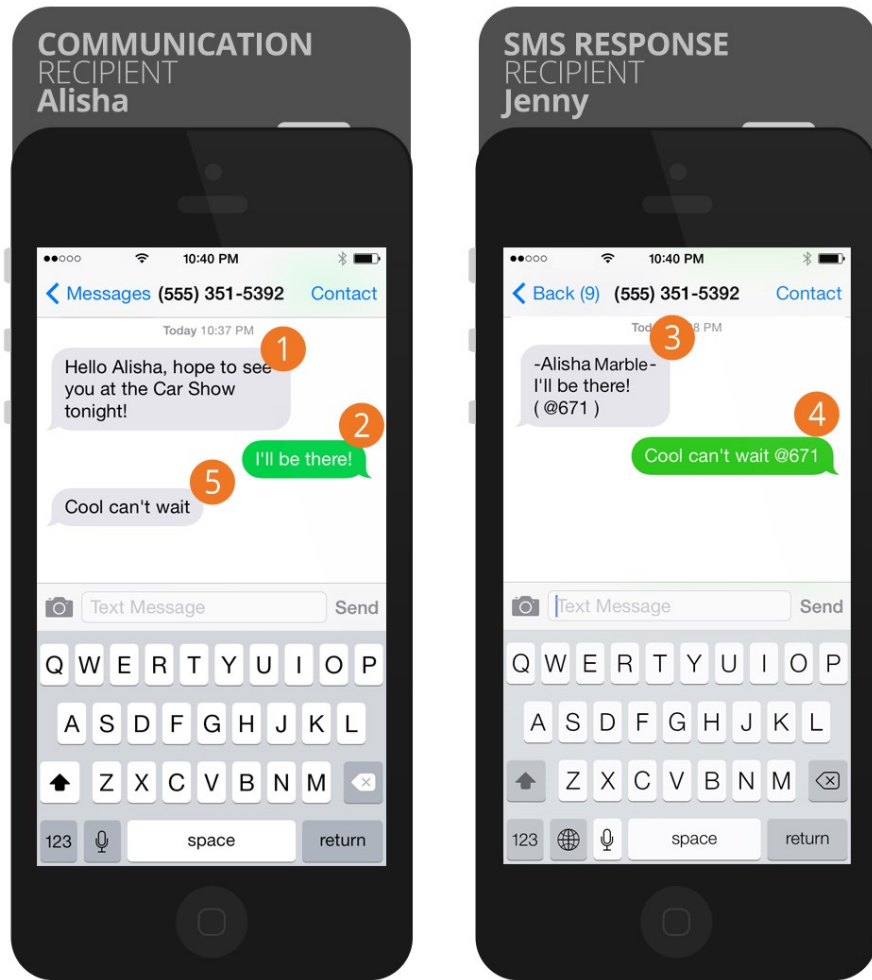
## SMS Replies

Once your message is sent, it's likely that some recipients will want to respond. Having a conversation over an application-hosted SMS service is difficult, however. Normally your text conversations occur between two phones. With Rock, the conversation actually occurs between the phone and the SMS phone number you configure through your SMS provider (e.g. Twilio). We've worked hard to provide you with advanced tools to be able to dialogue with your audience. Here's how it works.

When you send a SMS message, you select a number to send from. This number is configured to have a *Response Recipient* that will receive all of the responses for the number. When a response is received, the message will be forwarded to the response recipient along 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 The original bulk SMS message. Notice Jenny has cleverly used merge fields to personalize the text message with each recipient's name.
- 2 Alisha then responds to the message.
- 3 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 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 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.

## 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.

### Getting Started With Twilio

See the integrations section for more information on configuring Twilio as your SMS provider.

# 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 My 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 the some of your images appear as broken links in your email be sure that your *Public Application Root* organization setting is set to the proper URL. This can be modified under [Admin Tools > General Settings > Organization 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 your 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.

## 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 ISPs (cough Yahoo), have implemented new restrictive policies on emails that are sent from a user'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 History and Analytics

You can view a history of the communications you've sent under `Person > Communication History`. There you will see a list of each communication that you can filter by type, status and content, among other things.

## See The Bigger Picture

Users with *Administrate* permissions on this block will be able to see every communication in the system and have the ability to filter by a specific person.

Once you select a communication, you can see a page that shows you the status of your 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 these services you can see how many people have opened your message and even what links they have clicked. This gives you a much broader understanding of how well your message was received and what *calls to action* were engaged.

The screenshot displays the 'Communication Analytics' page for 'Communication #1'. The interface includes a navigation sidebar on the left and a main content area. The main content area shows the following details:

- Group Meeting** (Approved)
- Created By Alisha Marble (2 days ago)
- Approved By Alisha Marble (2 days ago)
- Status summary: 0 Pending, 2 Delivered, 1 Opened, 1 Failed, 0 Cancelled
- Message Details (expanded)
- Activity table (expanded):

Date	Person	Activity	Details
9/11/2015 12:15 AM	Ted Decker	Opened	Opened from Mobile Safari on iOS (70.166.99.182)

Below the activity table, there are filters for 50, 500, and 5,000, with 1 Activity displayed. At the bottom of the page, there is a 'Copy Communication' button and a footer that reads 'Crafted by the Spark Development Network / License'.

**1 Approver**

Shows who approved the communication and when the approval took place.

## 2 **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. This screenshot shows the Mailgun transport which supports every possible state. These states include:

- Pending - The communication has been saved but has not yet been sent.
- 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.
- Opened - The communication has been opened by the recipient.
- Failed - The communication did not reach the recipient. This could be from a bad email address or a hard bounce.
- Canceled - This state is used when a communication has been canceled by the sender.

## 3 **Message Details**

This panel shows the details of the message (e.g. the subject, message body, etc.)

## 4 **Activity**

This area of the page lists every activity for the communication including every time the message was opened by a recipient and every link inside the communication that was clicked.

## 5 **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. 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.



# HTML Emails

With today's design-oriented culture, traditional text-based emails just won't cut it. Adding an image or two isn't even enough. Today's recipient expects a well-designed email that is responsive to the device currently in front of them. That means crafting an email that works well on mobile devices, traditional desktop email applications and web-mail clients. Getting it right can be overwhelming, but don't worry, Rock is more than software; it's processes and best practices. Let us show you how you can score a homerun with a few simple steps.

## Understanding The Pitfalls of HTML Email

The state of formatted email is, simply put, a disaster. Clients support different standards and trying to get your email to look right on a mobile device and a desktop is troublesome at best. Fortunately smart people have worked hard to figure out the best way to make this all work, we only have to stand on their shoulders.

One of the best, most responsive HTML email frameworks is called Ink by Zurb Studios. They have developed both templates and a process to help alleviate the pain of formatting HTML emails.

### Note:

Rock has used these templates to create the default header and footer defined in the *Organization Attributes*.

One of the key pitfalls you should understand is the role CSS plays in HTML emails. If you're at all familiar with web development you know that CSS is what you use to style your web pages. Unfortunately many email clients (most notably Gmail) simply ignores traditional CSS syntax. It strips it out and pretends it never existed. Frameworks like Ink get around this by developing templates in HTML/CSS and then running the templates through an *inlining* process before using them. Inlining takes normal CSS rules and turns them into inline styles (yuck...). Here's an example:

```
Normal CSS
<style>
  h1 {
    color: red;
    font-size: 20px;
  }
</style>
```

#### Inlined CSS

```
<h1 style="color: red; font-size: 20px;">Title</h1>
```

Yes, after inlining you have a bit of a mess, but it works. When it comes to inlining you have two options. If you're using your own mail server you'll need to inline your email templates before using them. The other option is to use an email service that will inline your email on its way to the recipient. This option is highly recommended as it lets you keep your template in a simple-to-edit format.

# Email Templates

You'll find that you'll often send the same types of emails over and over. Instead of re-creating the styling over and over it's smart to create email templates as a starting point. Enough talk, let's get started with creating our first email template. For this example we'll create a reusable email template for promoting up-coming events. Let's go.

1. To create a new template, navigate to the *Communication Templates* screen which is under `Login Status (top right of the page) > My Settings > Communication Templates` and click the `+` button.
2. On the add screen, you can provide a name and description for your template. Spend a minute describing your template and when it should be used.
3. Below that, you can fill in the fields that should be a part of the template including the sender and subject lines.
4. Now you're ready to enter in the body of your email. Remember, this is a template so just add the skeleton of your message. You'll be replacing the actual content when you go to send it. If you're wanting to create a high quality template you might head over to Zurb's Ink template website.
5. Consider writing a text version for the hangers-on who haven't upgraded their email client in the last decade or so. Click `Save`, and your template is ready to roll.

## Communication Template Screen

Home / Communications / Communication Templates / New Template

### New Communication Template

Name \*  
Car Show Template

Description  
Used for the car show promotions.

Email SMS

From Name  
Jenny Michaels


From Address  
jenny@rocksolidchurchdemo.com

Reply To Address

Subject  
Customs & Classics Car Show

Message

Car Show Updates



body HTML

Message (Text Version)

Save Cancel

Crafted by the Spark Development Network / License

## Securing Email Template

You can add security to your templates to control who has access to use them. By default, if user has edit rights to the communication template block any templates they create will be accessible to anyone. If the user does not have edit rights, any templates they create will be visible only to them (but a user with edit rights can update security to share it with others).

### Security Reduces Clutter:

While your template is ready to be used, you may consider adding security to it to limit its usage to a targeted group of people. This can help reduce the inappropriate use of a specific template and reduce the clutter staff sees with they select a template from the *New Communication* page.

## Default Email Template

Feel free to edit the default template or create a new one. If you would like to change the template that is treated as the default go to the new communications page ( [Tools](#) > [New Communication](#) ) and edit the block settings of the new communication block. One of the settings of this block is the template to use as the default.

# System Emails

System emails are email templates that are used by Rock to send very specific messages. An example of a system email is the message someone receives with they've forgotten their password and requested to reset it. While Rock sets up these to look professional from the start, you may want to consider modifying them to match your organization's branding. You can edit these emails under [Admin Tools > Communications > 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.

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. For more information on inlining see the HTML Email Section.

### Costs

Mailgun has a free starter package that generously gives you 10,000 emails a month. After that you can pay by the number of emails you send. In our experience, Mailgun's pricing has been very competitive and their features are among the best in their class.

While the free 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 dedicated IP address for \$59 per month. And if you've already found yourself on a blacklist, Mailgun has provided documentation that shows you what to do next.

### 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, click on the 'Domains' tab and then select the domain you would like to use in Rock. Note the 'API Key', 'SMTP Hostname', 'Default SMTP Login' and 'Default Password' fields. Note the values from these fields you'll need them in a step below.
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.  
`http://[yourserver.com]/webhooks/Mailgun.ashx`
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'.  
`http://-yourserver-/Webhooks/Twilio.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 From Values`. 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.

## 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