COMMUNICATING WITH ROCK

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.

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 chapter. 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 `Rock 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, the communications features are 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.

Mediums

Think of mediums as methods of communicating. Today Rock provides an email medium, an SMS medium and a push notification medium. Other mediums could easily be added in the future. 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 > Settings > Communication Mediums`.

Transports

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. This is typically where you reach out to a third-party service like Mailgun (for email) or Twilio (for SMS messaging). Settings for the different transports are configured under `Admin Tools > Settings > Communication Transports`.

Some transports let you control how many recipients will be processed at the same time by adjusting the *Concurrent Send Workers* value. This lets you throttle your communications. High volumes of emails sent in a short period can be a red flag for spam activity. Also, large email bursts can potentially overload servers, possibly impacting Rock's performance.

A medium can only use one transport at a time. So, you can't have your email medium set up to use both Mailgun and SendGrid. Because the transport gets attached to the medium, you usually set up transports first.

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 > 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.

Unsubscribing From Emails

It's very important that recipients of your emails have a way to unsubscribe from future emails, and that requests to unsubscribe are processed in a timely manner. Failure to do so can have legal implications, including fines of up to $51,744 for each individual email sent. Not to mention, your email reputation (a metric used by ISPs to help determine if your organization's email is spam) will suffer, resulting in a loss of deliverability.

To learn more about unsubscribing and what you can do to ensure you remain in compliance and stay off of spam lists, check the Unsubscribing section in the Configuring Email chapter below.

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.

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 (i.e., Communication Transport) that supports the notification of these messages. Currently, the only core integration that supports bounced mail processing is Mailgun. You can read more on this integration in the Integrations chapter of this manual. Third-party provided solutions may be available for other services.

SMS Pipeline

In this chapter we'll look at how Rock handles incoming SMS messages using Rock's SMS Pipeline feature.

Rock's SMS Pipeline is the entry point for all incoming SMS messages. Think of it as a switchboard operator that's directing each message to its intended action.

The Fundamentals

Below is an overview of how the SMS Pipeline feature works. If some of these concepts are foreign to you right now, don't worry. We'll go over all the details in the next section.

1. An incoming SMS message is received into the pipeline.
2. The message flows down the pipeline, through a series of *Actions*. Actions are activities that the system performs, like launching a workflow.
3. Each action has filters. The pipeline uses filters to analyze the message and its contents against criteria you provide. If the message meets your criteria, then the action is performed. If not, the message moves to the next action. This process repeats until an action is performed.
4. When an action is performed, the pipeline looks at the action's *Continue* setting. This determines if the message should continue down the pipeline to the next action, or if the matched action is all that's needed.
5. If a message continues down the pipeline after an action has already been performed, it works the same way as described in #3 above. Satisfying the filter criteria for one action does not mean the message automatically satisfies the filters on the remaining actions.

These general steps are repeated for each new message you receive. That means you can use a single pipeline to perform different actions for a variety of scenarios.

Anatomy of Actions

Actions automate many of the tasks you would want to perform in Rock after receiving a text message. For instance, you might want to send the person an automated reply message. Or you might want to launch a workflow if the person's message contains certain keywords.

Each action you add has its own settings and filters, giving you full control over what should happen and when.

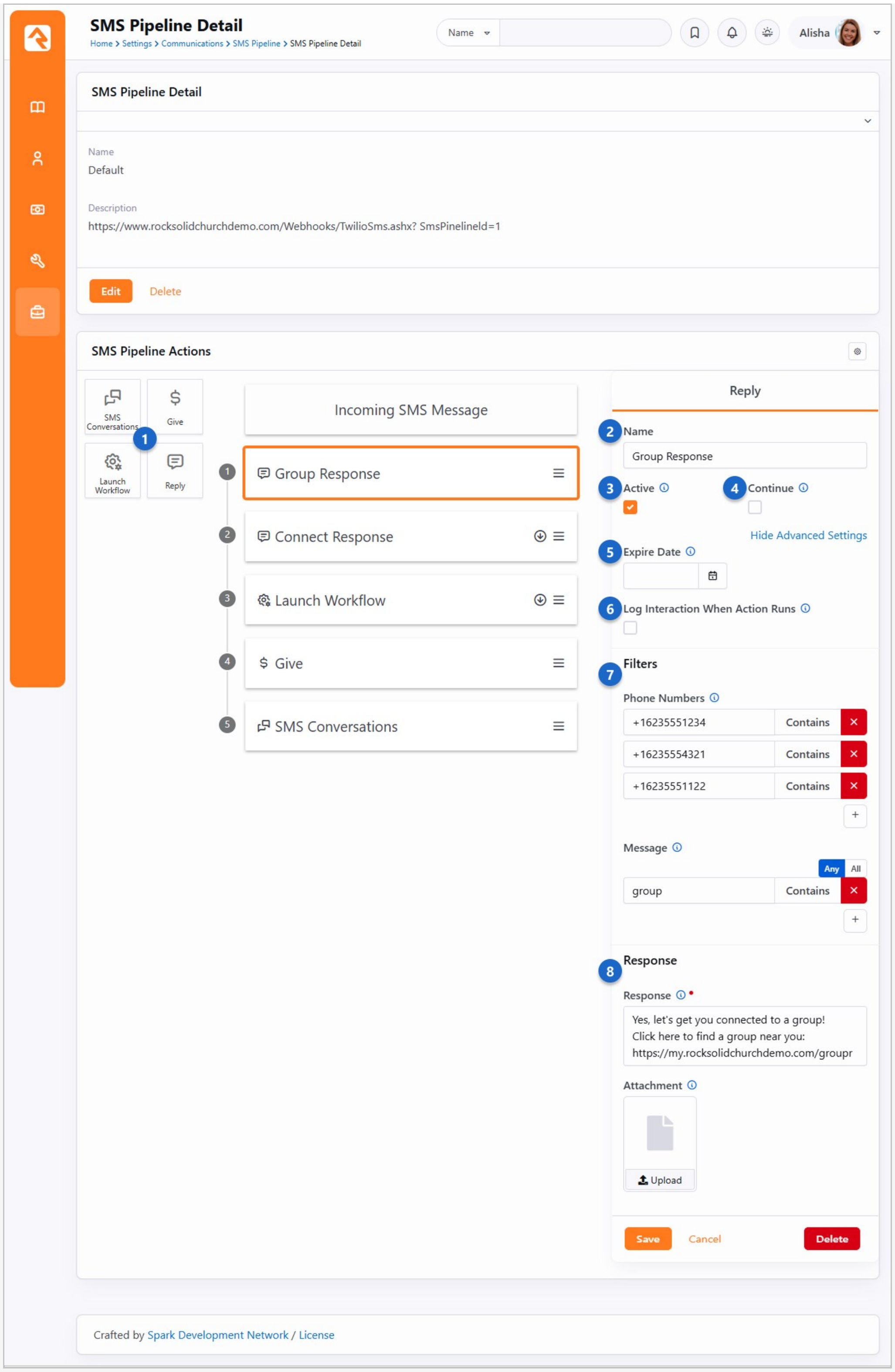
There are four SMS Pipeline actions:

- Give

- Launch Workflow
- Reply
- SMS Conversations

We'll use the Reply example pictured below to describe the properties of actions in general. Then in the following sections we'll dive into each type of action individually. The below page can be accessed from `Admin Tools > Settings > SMS Pipeline`.

SMS Pipeline Actions



1 **Actions**

These are the actions you can add to the pipeline. Click and drag the desired action into the center of the page to add it.

2 **Name**

This is the name of the action, which displays within the pipeline in the center of the page. The default name will be the type of action it is. If you have the same type of action in your pipeline more than once, you'll want to change their names so you can easily tell them apart.

3 **Active**
The action will only be performed if it is active. You might want to disable actions that only apply during certain times of the year, so you don’t need to delete them when they’re no longer needed.

4 **Continue**
After an action is performed the process will check the *Continue* setting for that action. If *Continue* is enabled, the message will continue down the pipeline to the next action. When *Continue* is disabled, the process ends with that action and any remaining actions in the pipeline are ignored.

5 **Expire Date**
If you open the Advanced Settings, you'll see an *Expire Date*. The Rock Cleanup job will delete the action from the pipeline automatically after this date passes. If you have actions that are only temporary or only apply to a particular time period, this means you don't have to remember to update your pipeline when the action is no longer needed.

6 **Log Interaction When Action Runs**
Also located within the Advanced Settings, you can choose to have an interaction written when the person sends a text. This is a great way to find out when and how often each keyword is getting used. See the info icon for additional details.

7 **Filters**
Filters decide whether an action will be performed. If a message meets the action’s filter criteria, then the action is performed. If not, the process moves to the next action to evaluate that set of filters. If no filters are applied to an action, every message that reaches the action will cause the action to be performed.

8 **Action-Specific Properties**
This area will appear for actions where additional setup is needed. It will change depending on the type of action. We’ll cover these properties in the next section.

SMS Pipeline Webhooks

You might have noticed the *Webhook URL* at the top of the *SMS Pipeline Detail* page. This identifies the pipeline you’re viewing. You’ll use this URL to link your phone numbers to a specific pipeline. See below for details.

SMS Pipeline Actions

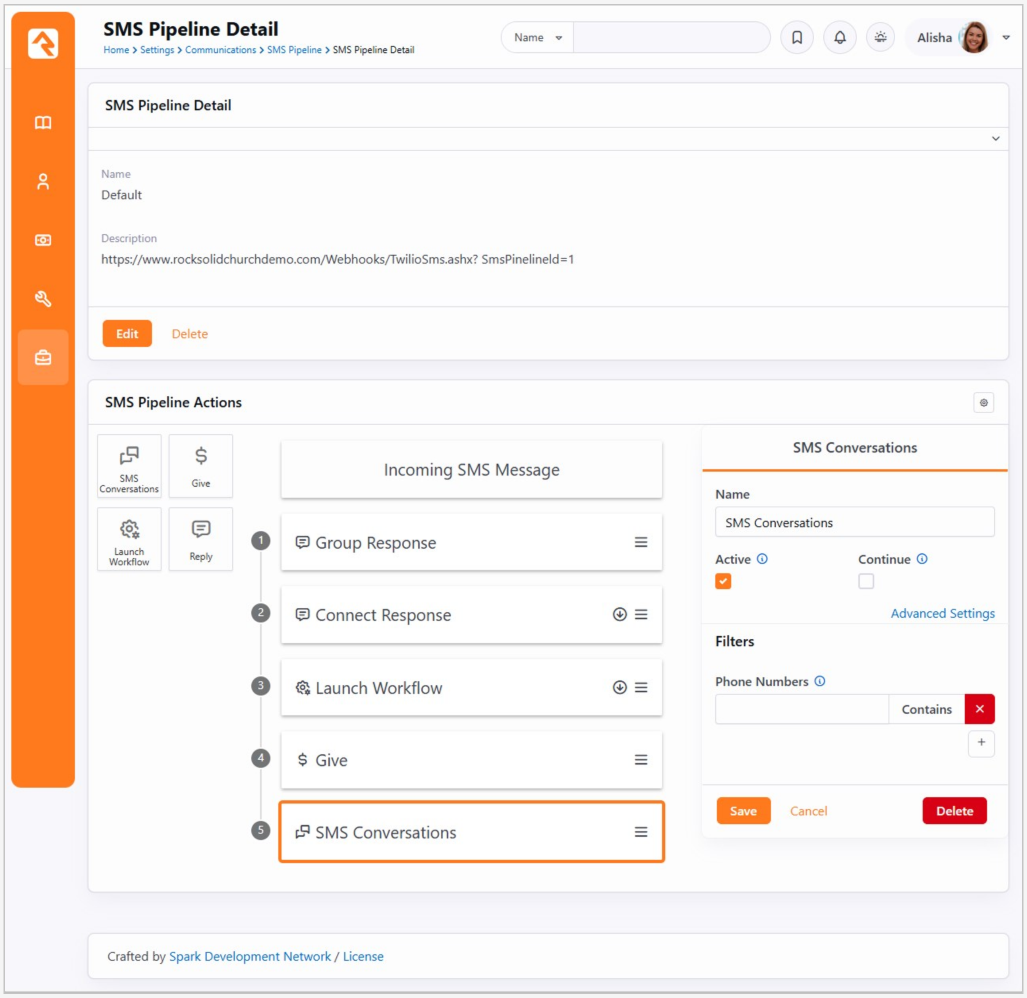
As noted in the prior section, all actions share some common properties. However, each type of action has unique features and properties that we’ll describe in detail below.

SMS Conversations

This action will send the message over to the SMS Conversations page, at which point you're messaging with the person directly. There is only one filter for this action, and no additional unique properties.

Remember, the phone number filter references the number to which the person sent the message, not the person's phone number. If this is left blank, then every message that reaches this action will go to the *SMS Conversations* page.

SMS Conversations

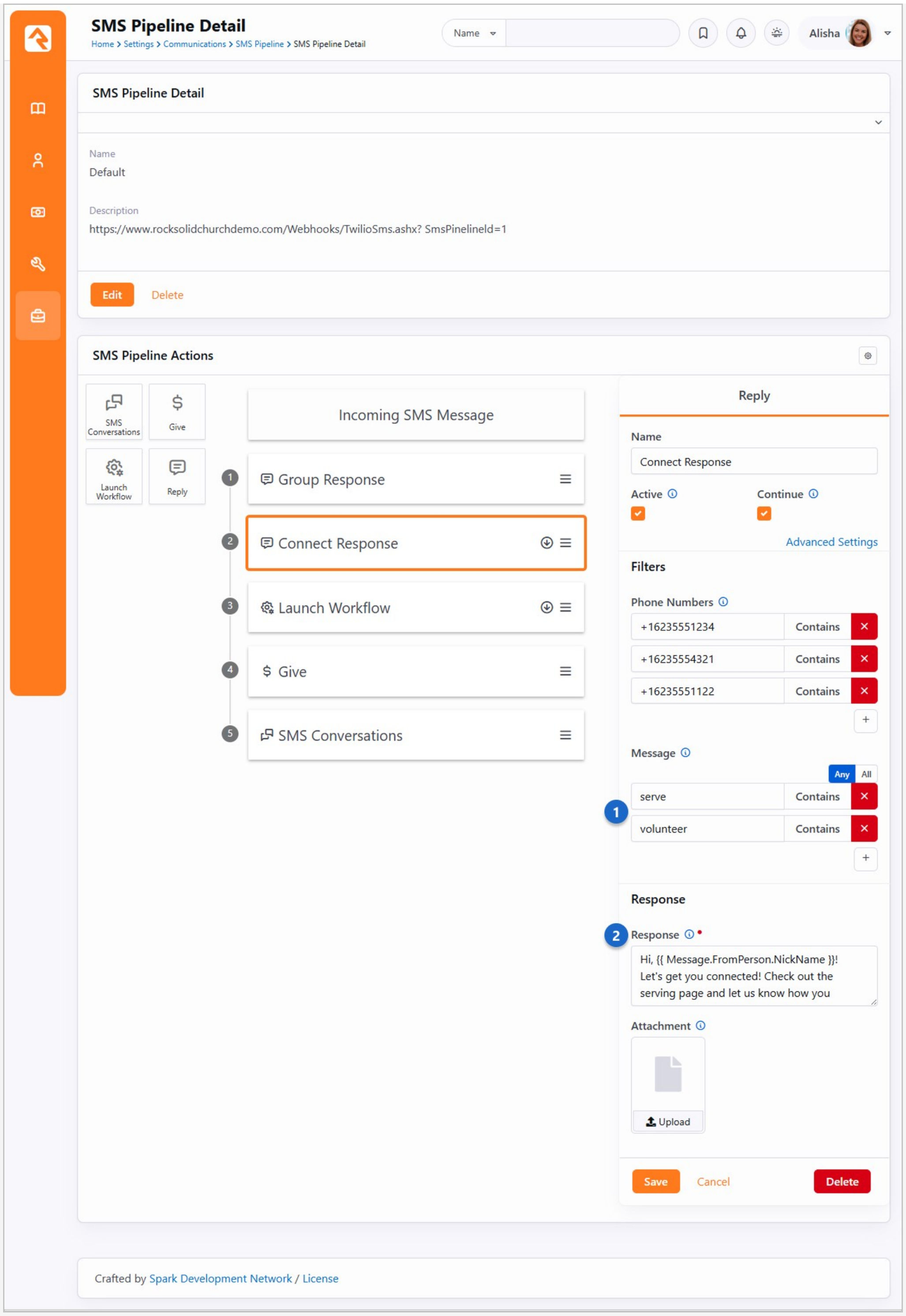


As pictured above, the SMS Conversations action is typically at the bottom of the pipeline. If the person's message doesn't meet the criteria for any of the other actions, this is how you can ensure it doesn't fall through the cracks.

Reply

The *Reply* action is an easy way to automate responding to an incoming text. You can customize the content of your response and personalize it for the recipient using Lava. The reply action can in some cases eliminate the need for a workflow if a specific message is always to be returned.

Reply



1 **Message Filter**
You can check the content of the incoming text message against key words you provide. You can add as many of these conditions as needed. You can also select whether the message requires "any" or "all" of those criteria to match.

2 **Response**
This is the content of your organization's response, which will be sent if the incoming message meets the filter requirements. You can personalize the response using Lava, and you can even add an attachment. You can

attach JPG, GIF, and PNG images for all carriers, but other file types may not work depending on the carrier and device. Send a few test messages to different carriers and phone types to confirm the attachment is delivered correctly before sending to a wider audience.

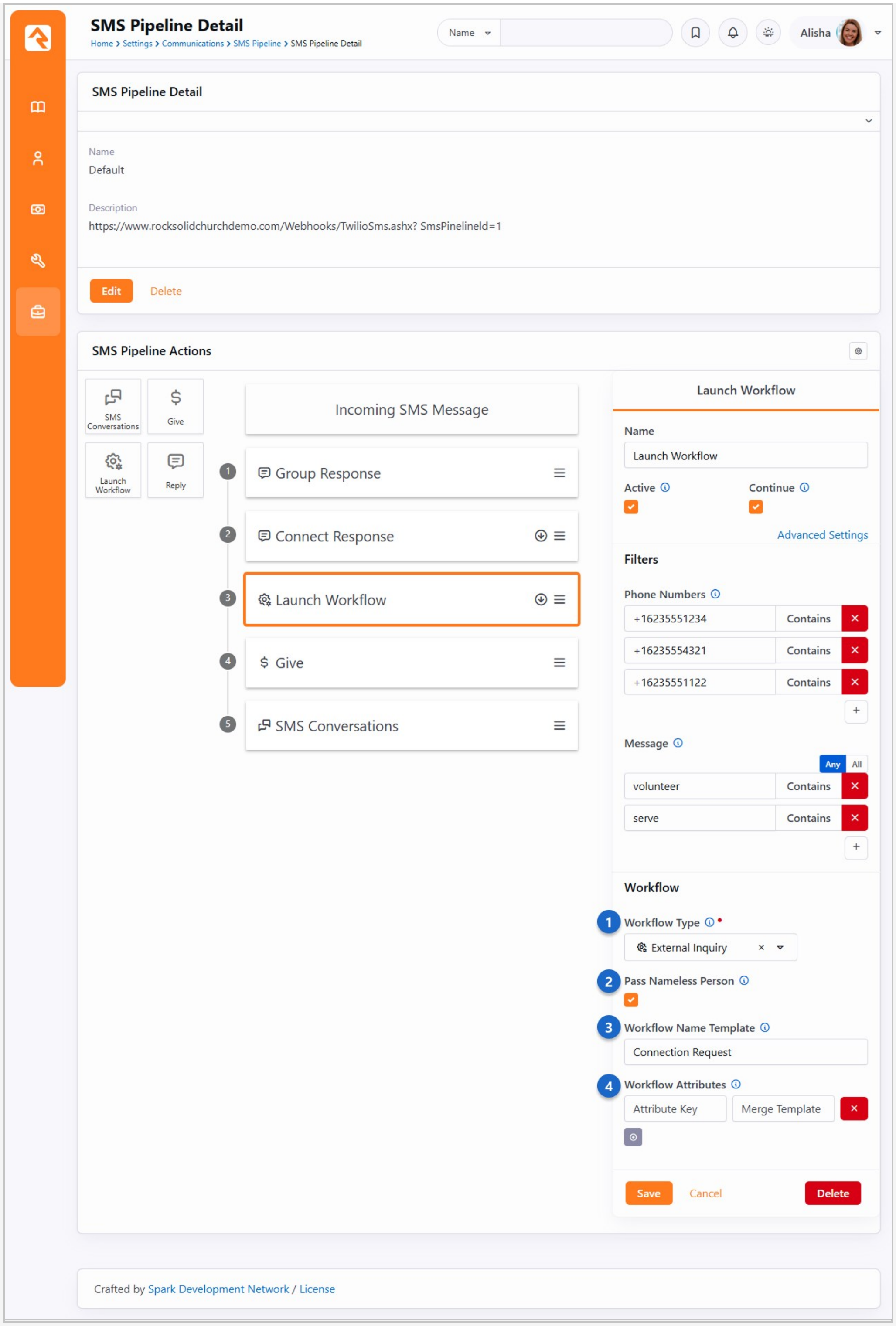
The example pictured above will only perform the Connect Response action if the words "serve" or "volunteer" are somewhere in the message's text. If the incoming text says "I would like to serve" then the contents of the *Response* field will be sent to the person as a text message. In this particular example a workflow might also be launched for this message, because the *Continue* option is enabled.

> **Reserved Keywords**
>
> If one of the below keywords is received (as the entire body of the message), the SMS Pipeline will uncheck the *SMS* box for the person's phone number, and add the following icon next to the mobile number as seen when editing the *Person Profile*. In this case, any additional SMS message processing that may be in the pipeline will be skipped.
>
> - **STOP**
> - **STOPALL**
> - **UNSUBSCRIBE**
> - **CANCEL**
> - **END**
> - **QUIT**
> - **REVOKE**
> - **STOPALL**

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 SMS Pipeline Workflows chapter of the `Blasting Off with Workflows` guide.

Launch Workflow Action



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.

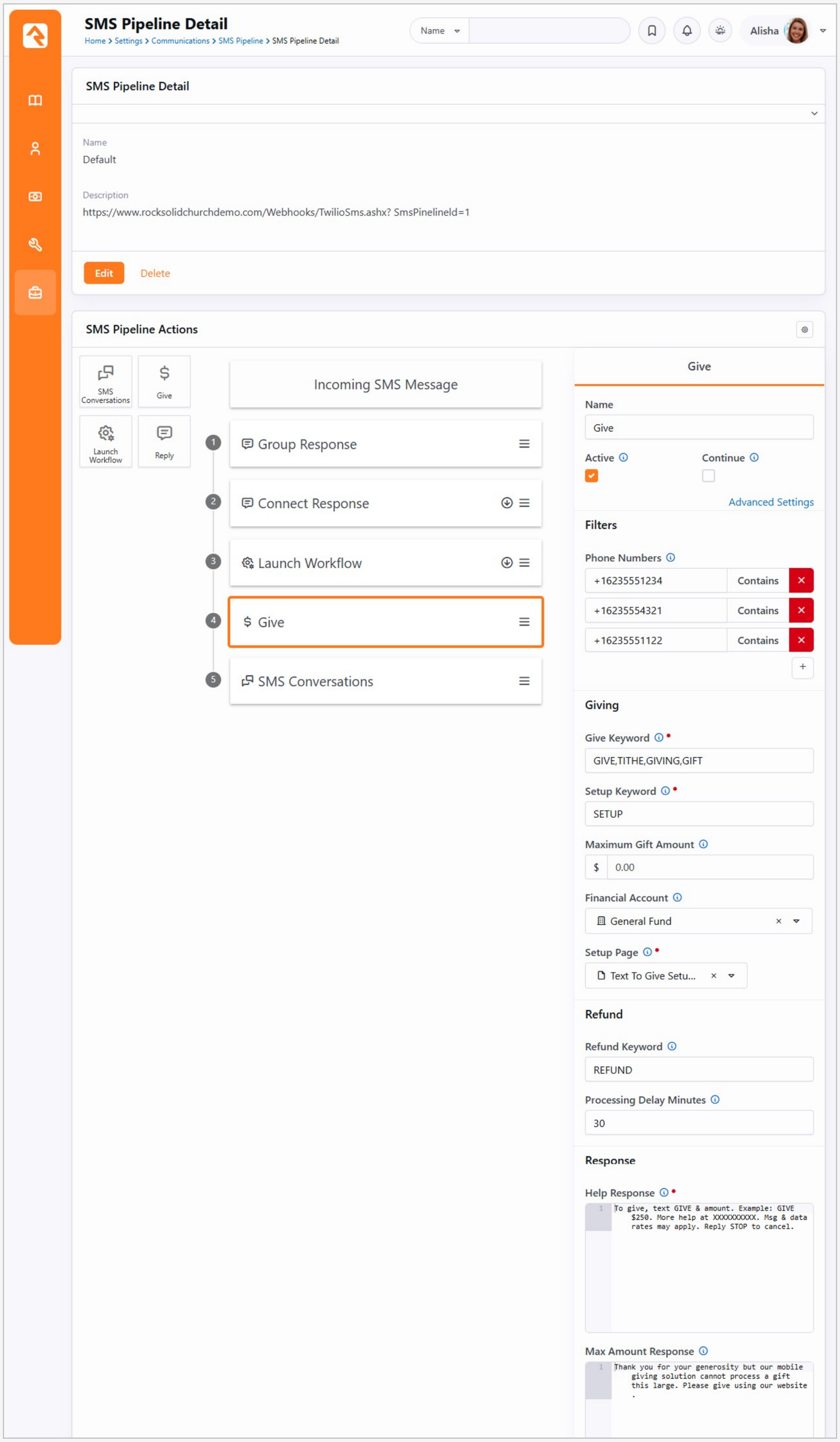
4 **Workflow Attributes**
This lets you pass information, like the person or their phone number, to the workflow you want to launch. See the SMS Pipeline Workflows chapter of the `Blasting Off with Workflows` guide for details on setting this up.

Give

This action enables *Text Giving* functionality, allowing a person to send a text to donate using their phone.

The *Give* action isn't ready to use out of the box. An administrator will need to configure the settings for the *Utility Payment Entry* block in addition to SMS Pipeline setup. For details on *Text Giving* and the required configuration, head over to the `Rock Solid Finances` manual.

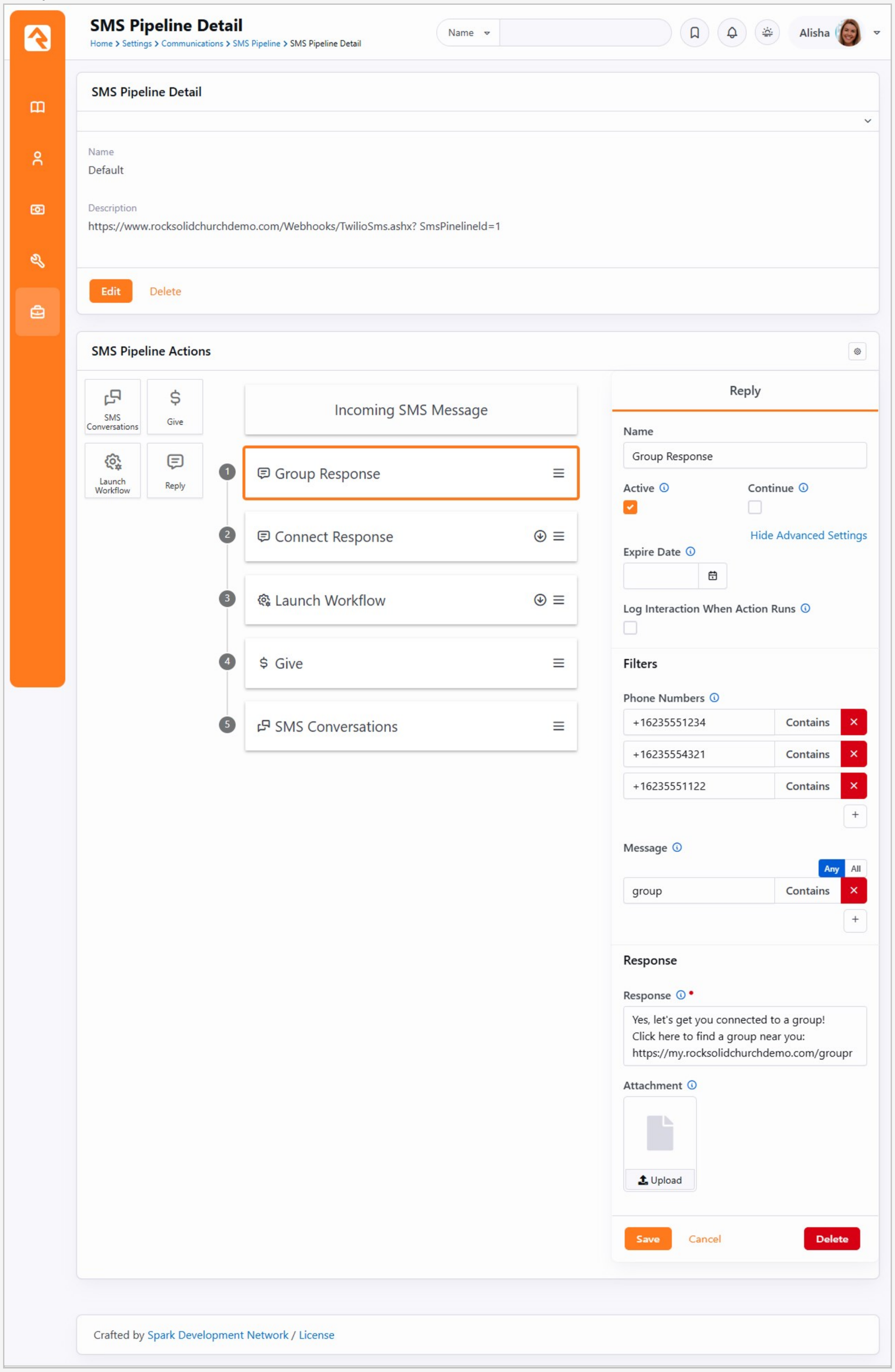
Give Action


SMS Pipeline Detail
Home > Settings > Communications > SMS Pipeline > SMS Pipeline Detail
Name
Alisha
SMS Pipeline Detail
Name
Default
Description
https://www.rocksolidchurchdemo.com/Webhooks/TwilioSms.ashx? SmsPipelineId=1
Edit
Delete
SMS Pipeline Actions
SMS Conversations
Give
Launch Workflow
Reply
Incoming SMS Message
1 Group Response
2 Connect Response
3 Launch Workflow
4 Give
5 SMS Conversations
Give
Name
Give
Active
Continue
Advanced Settings
Filters
Phone Numbers
+16235551234 Contains
+16235554321 Contains
+16235551122 Contains
Giving
Give Keyword
GIVE,TITHE,GIVING,GIFT
Setup Keyword
SETUP
Maximum Gift Amount
$ 0.00
Financial Account
General Fund
Setup Page
Text To Give Setu...
Refund
Refund Keyword
REFUND
Processing Delay Minutes
30
Response
Help Response
To give, text GIVE & amount. Example: GIVE $250. More help at XXXXXXXXXX. Msg & data rates may apply. Reply STOP to cancel.
Max Amount Response
Thank you for your generosity but our mobile giving solution cannot process a gift this large. Please give using our website.

SMS Pipeline In Action

Let's look at a completed pipeline to see how this all comes together. This pipeline has four actions and was designed to handle inquiries about small groups and connecting. Below each screenshot we'll highlight the key points.

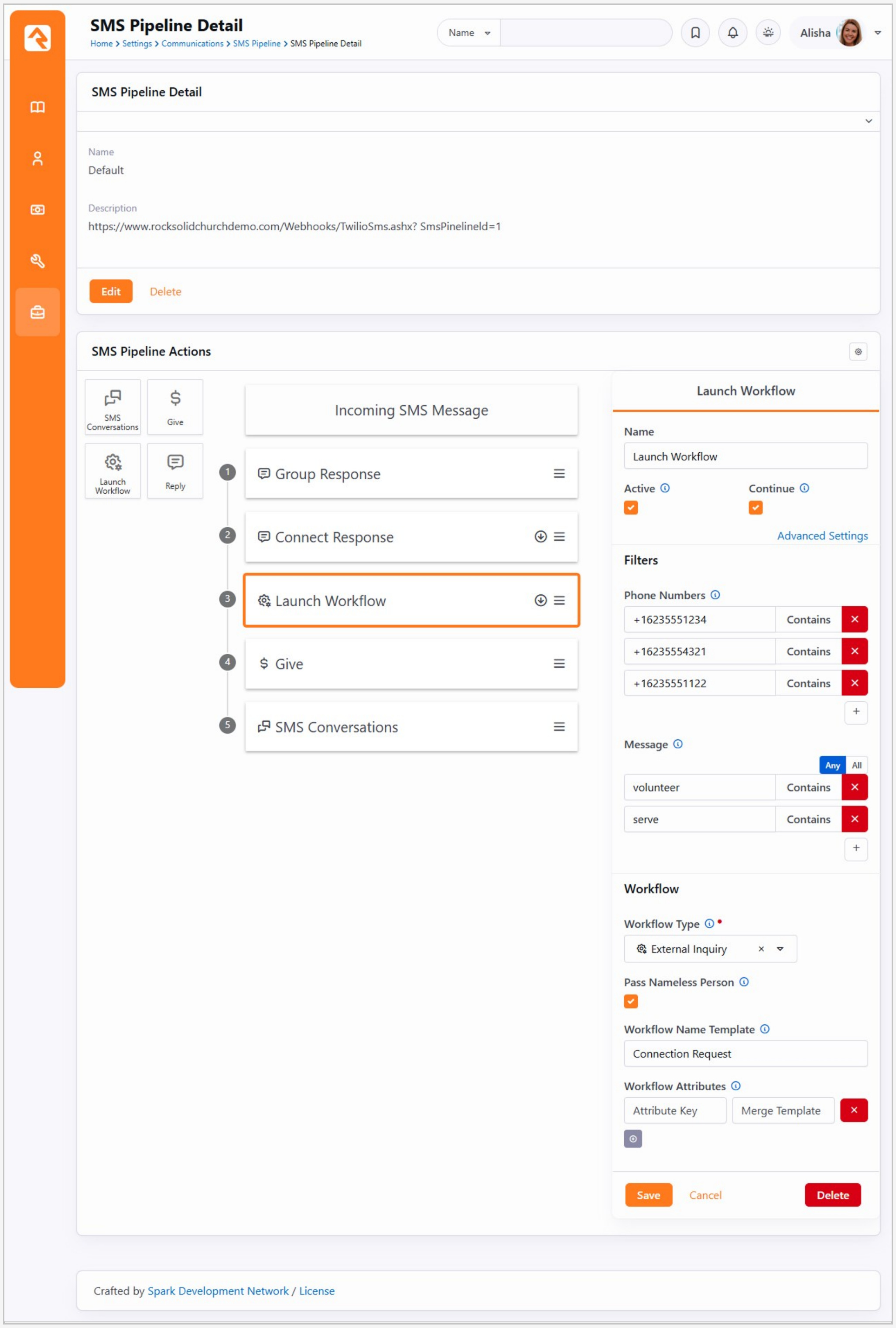
Response



As pictured above, when an incoming text contains the word 'group', an auto-response will be sent to the person with more information about joining a group. In this case the processing stops, because the *Continue* option is not enabled.

If the SMS message doesn't contain the word 'group' then the "Connect Response" action will be evaluated because it's the next in line. If the 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.

Launch Workflow



You'll note in the screenshot above that the workflow action has the same filters as the "Connect Response" action. That means any message which activates the "Connect Response" action will also launch this workflow.

Lastly, the pipeline continues down to the “SMS Conversations” action so that a staff member can directly connect with this person.

In this case, the "SMS Conversations" action has no filters applied. Knowing this, and looking at the pipeline as whole, all incoming SMS messages will end up in the *SMS Conversations* page except messages that contain the word 'group'.

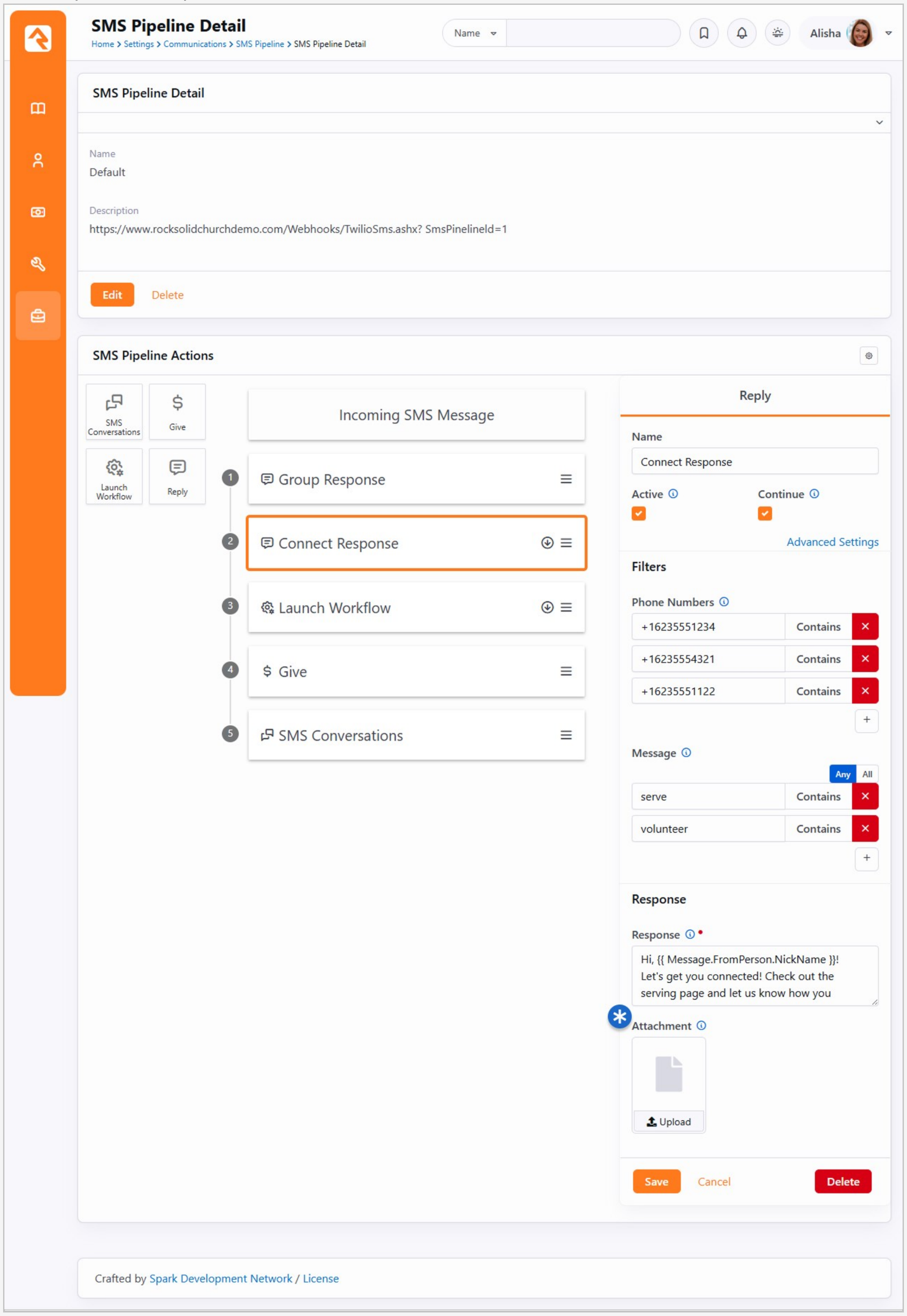
If we enabled *Continue* in the "Group Response" action, then every incoming SMS message would go to the *SMS Conversations* page. In that case, a message containing the word 'group' would not satisfy the "Connect Response" and "Launch Workflow" filter criteria, so those actions won't be performed.

In this example pipeline, if an SMS message is received that says "I'd like to learn more about your services" it would pass through the pipeline straight to the "SMS Conversations" action. No automated replies would be sent, and no workflows would be launched for that message because it does not meet the criteria for those actions.

SMS Pipeline Lava

You can use Lava to customize and personalize your pipeline's actions. There are different merge fields depending on whether you're working with the Reply or Launch Workflow action.

SMS Pipeline Response Lava



Launch Workflow Action Lava

Below is a list of Lava merge fields you can include in your pipeline when you're working with the Launch Workflow action. These are the same workflow attribute merge fields we cover in the SMS Pipeline Workflows chapter of the `Blasting Off With Workflows` guide.

SMS Pipeline Workflow Lava Merge Fields

Merge Field	Description	Field Type
{{ FromPerson.PrimaryAlias.Guid }}	The pipeline uses the person's phone number to look up the first person with that phone number. If it finds a match, it assigns that individual's record to FromPerson. If the phone number is used in more than one profile, the pipeline defaults to the first record of an adult with children.	Person
{{ FromPhone }}	The person's phone number, pulled from the inbound message, from the SMS gateway. This will automatically get added to the workflow as FromPhone and will include the country code (i.e., the raw phone number 18645555555).	Phone Number
{{ ToPhone }}	The SMS gateway number where the message was sent.	Phone Number
{{ ReceivedDate }}	The date the message was received.	Date
{{ ReceivedTime }}	The time the message was received.	Time
{{ ReceivedDateTime }}	The date and time the message was received.	Date Time
{{ MessageBody }}	The content of the SMS message that was received.	Text or Memo
{{ MatchedGroups }}	If the RegEx expression provided contains matched groups, they are loaded into an array here. This is an advanced feature, so if you're not sure what this means, don't worry. You probably don't need it.	Typically, you fill in a text field with a merge expression of a single result from the MatchedGroups array.

Reply Action Lava

Below is a list of Lava merge fields you can use when you're working with the *Reply* action. Note that each uses a prefix of `Message`.

SMS Pipeline Reply Lava Merge Fields

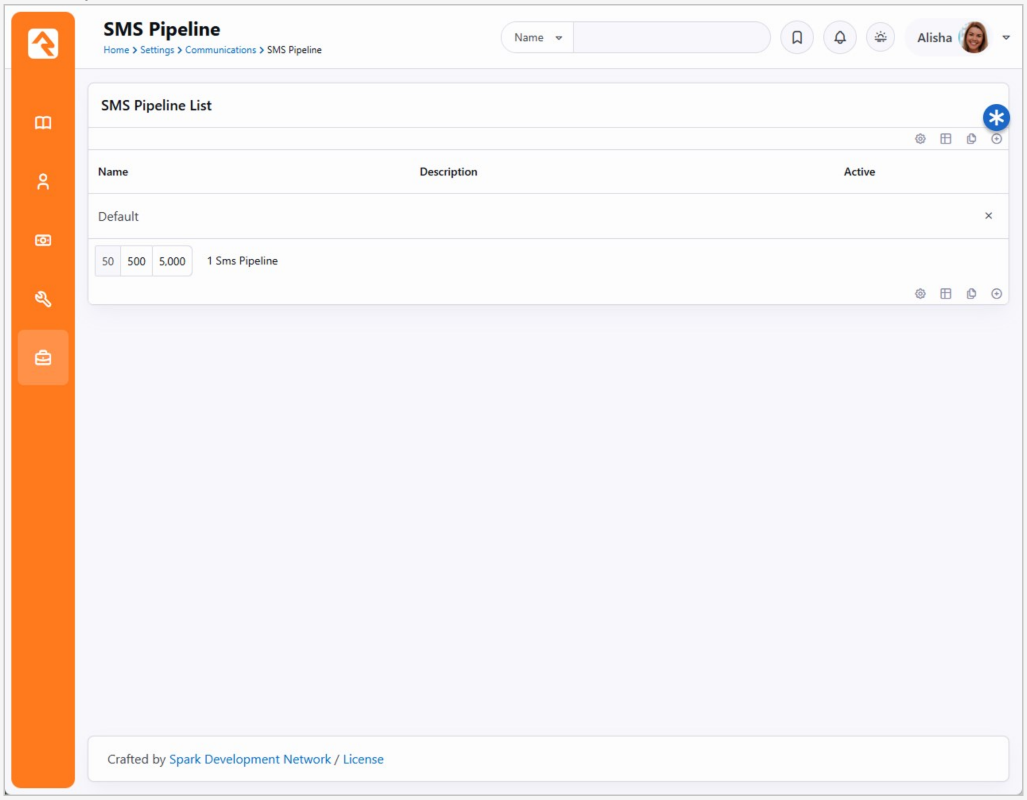
Merge Field	Description
{{ Message.FromNumber }}	The person’s phone number from the inbound message
{{ Message.ToNumber }}	The SMS number where the message was sent
{{ Message.FromPerson }}	The pipeline uses the person's phone number to look up the first person with that phone number. If it finds a match, it assigns the value to FromPerson. If the phone number is used in more than one profile, the pipeline defaults to the first record of an adult with children. This is the full Person object, so, for instance, you'll need `{{ Message.FromPerson.FullName }}` to get the person's full name.
{{ Message.Message }}	The content of the SMS message that was received

Adding New Pipelines

Technically a single pipeline is all you need in Rock. After a while though, you might find that your single pipeline becomes complex, especially if you have multiple numbers that you are supporting. In this case you can create additional pipelines. Please note though that a single SMS phone number can only work with a single pipeline, but a pipeline can service multiple SMS numbers.

To start, navigate to `Admin Tools > Settings > SMS Pipeline`. From here you can add, delete or edit your list of pipelines.

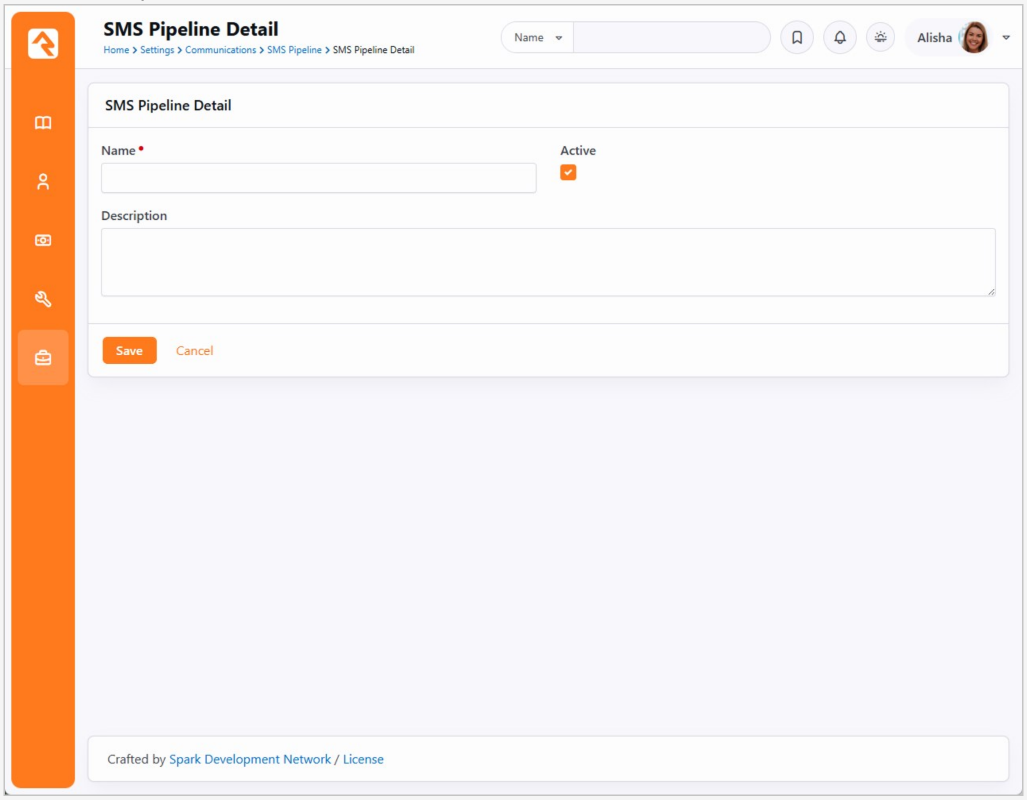
SMS Pipeline List



Click the button to add a new pipeline or click an existing pipeline to access its details. You can edit the 'Default' pipeline that ships with Rock, or you can create your own. In this example we'll add a new pipeline from scratch so you can see the process.

The first thing you'll need to do is provide a name and description for the pipeline. If you have multiple pipelines, be sure to make the name and description clear.

Add New Pipeline



Click the `Save` button, and that's all you need to start configuring your new pipeline using the instructions in the above sections. Remember, each pipeline can be associated with its own webhook (see below) for added flexibility.

> ### From One to Many
> If you started using SMS Pipeline before Rock v11, you don't need to change anything. The webhook you have in place will continue to work. However, don't forget that a webhook will stop working if the associated pipeline is deleted.

SMS in Detail

Before you can start using the SMS features Rock has to offer, you need to set up a phone number. This chapter provides the information you'll need to get started.

Boosting Engagement with SMS

In the modern era, SMS messaging has become the predominant means of communication, surpassing phone calls and emails in popularity. SMS messages are typically read promptly and are more likely to elicit swift responses. However, it is not permissible for any organization to send an SMS message to an individual unless the recipient has explicitly given their consent by opting in. As a result, Rock has incorporated an SMS Opt-in Checkbox in most areas where mobile phone numbers can be entered.

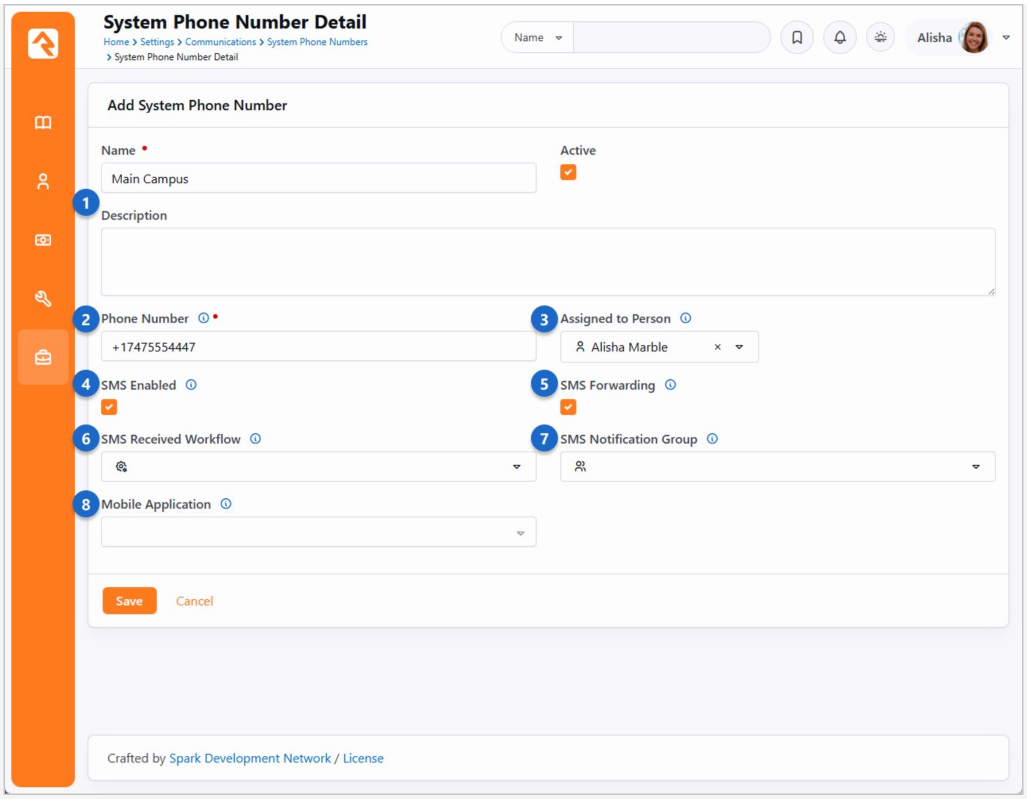
Furthermore, we recognize that every organization is unique and may have distinct legal requirements. Therefore, the verbiage for the SMS Opt-in checkbox can be completely customized to meet your specific needs. You can customize the SMS Opt-in message at `Admin Tools > Settings > System Configuration` under the UI Settings Tab.

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 in a later chapter. Even if you don't have a phone number set up yet, it's important to be familiar with the *System Phone Number* settings because they are referenced later in this chapter.

These settings can be accessed and maintained from `Admin Tools > Settings > System Phone Numbers`.

System Phone Number



1. **Basic Settings**
   Here you can give the number a name, make it active or inactive, and you can choose a description. A good description can be very helpful if you have multiple phone numbers. 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

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

3. **Assigned to Person**
   The person you select here will receive the incoming messages sent to the SMS Phone Number you're viewing. This only happens if *SMS Forwarding* is enabled. Be sure the individual you select has a valid SMS phone number on their record.

4. **SMS Enabled**
   This simply indicates whether the number can be used in SMS contexts within Rock.

5. **SMS Forwarding**
   If enabled, then incoming messages to this SMS Phone Number will be sent to the *Assigned to Person* and to the SMS Pipeline. If this is not enabled, then the conversation will still go to the SMS Pipeline or SMS Conversations, but it will not be sent to the *Assigned to Person*.

6. **SMS Received Workflow**
   You have the option of automatically launching a workflow when a response is received. Use this field to indicate which workflow should launch. Don't forget, you can use the same phone number to launch different types of workflows using the SMS Pipeline.

7 **SMS Notification Group**
The members of this group will be notified when a message is received to this number. This option only works with a Rock Mobile app, via push notifications.

8 **Mobile Application**
Using this requires that you have Mobile configured correctly. This determines which mobile application to use when sending notifications.

In addition to the Assigned to Person settings described above, you can apply security to each System Phone Number individually. Simply click the icon when viewing the Phone Number to apply security for that number. Please note that the security does not transfer over to *SMS Conversations*, *Communication Wizard* and *Simple Communication* blocks.

You may also want to review the block settings for SMS Conversations to further refine how your numbers are used and who can see them.

SMS Number Strategies

Now that you've seen how SMS replies are handled in 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 if you need more than one. Think about getting a number for each department and/or heavy SMS user. It's also very easy to turn an 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 changing the *Response Recipient* as described above.

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.

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.

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

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 slows the delivery of non-short code numbers. By default, it is set to 500 milliseconds, or half 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 > Settings > Communication Transports`). You can also disable Long Code Throttling altogether. Keep in mind, though, that this may result in your messages not being delivered.

Configuring Twilio for SMS Pipeline

In the past, each SMS feature included its own webhook. The SMS Pipeline condenses those features into one place, so you only have to use one webhook. That means you can use a single phone number for a variety of different purposes.

To set your number up for the SMS pipeline in Twilio, set the *A Message Comes In* URL to:
`https://YourServer/Webhooks/TwilioSMS.ashx?SmsPipelineId=YourPipelineId`

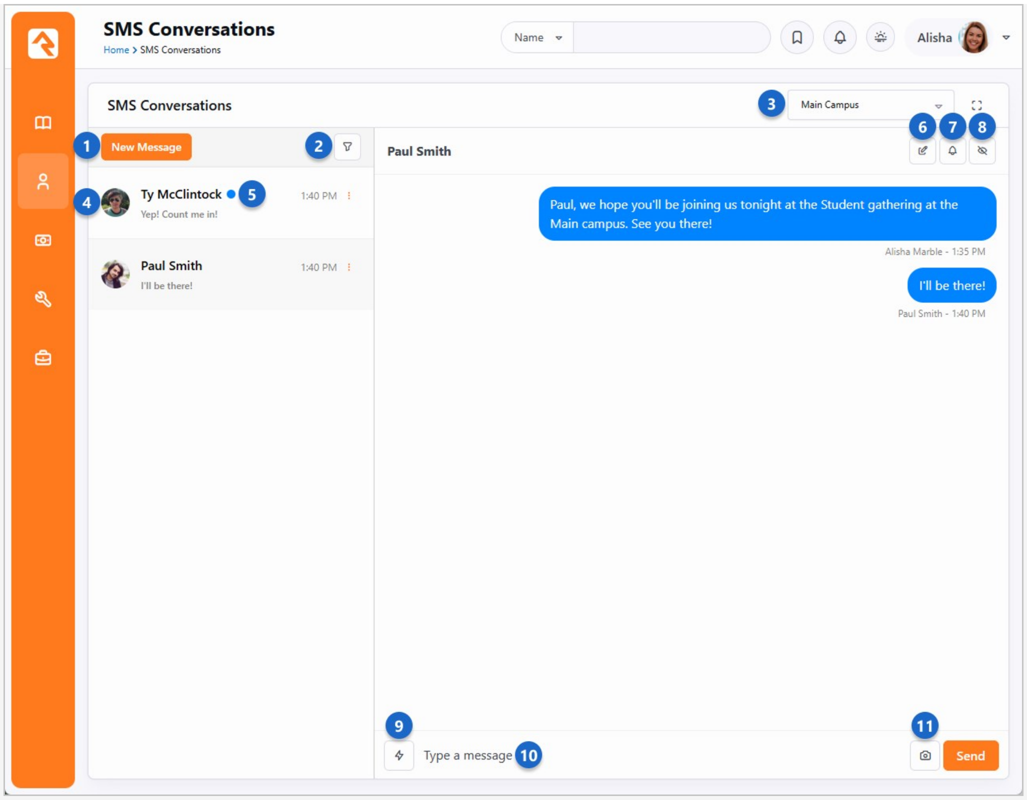
If you need multiple SMS Pipelines, you can link each one to your phone numbers by specifying the pipeline’s ID in the URL.

See the Integrations chapter for more information on setting up Twilio in general.

SMS Conversations

In the prior chapter we explain why many of your incoming SMS messages will end up getting passed from the *SMS Pipeline* into *SMS Conversations*. Now, let’s take a step back and see how to manage those messages, or messages that are sent to *SMS Conversations* directly. Navigate to `People > Communications > SMS Conversations` to start.

SMS Conversations Page



1 **New Conversation**
This will open up a new window to start a conversation with an individual. You can send the SMS message directly from Rock, and even include an image.

2 **Recipient Filter**
Use this filter to search for specific recipients. This is a fast alternative to scrolling through a lengthy list of people to find the conversation you're looking for.

3 **Available SMS numbers**
You can change between currently active SMS numbers by clicking the drop-down here. Changing the number will show you conversations associated with that number. If only one number is available, then the dropdown is replaced with a label.

4 **All Responses**
This panel displays all the responses to the selected SMS number. Clicking on any of the listed responses will show you the conversation with that person.

5 **Unread Indicator**
Indicates that the message has not yet been read.

6 **Add Note**
Text conversations can hold important information. By adding a note directly from SMS Conversations, you can track details about the conversation in a more visible and accessible way. The block's settings let you limit the Note Types that can be used.

7 **Add Reminder**
Need to follow-up with this person in the future? Add a reminder straight

from your conversation.

8 **Mark Read/Unread**
Toggle a conversation's status between "Read" and "Unread."

9 **Insert Snippet**
Quickly insert prewritten SMS Snippets into your messages (see the SMS Snippets section below for more details).

10 **Message**
All you need to do is type your message here and hit `Send` to keep the conversation going. Your outgoing messages and responses will be shown in the screen above.

11 **Send Image**
Click the icon to upload and send an image to the person.

We realize that every organization is different, so we added in settings allowing you to customize each feature for your needs.

Suppose you have the Students Director and First Impressions Director messaging their own volunteers. You can create multiple pages with the *SMS Conversations* block on them. Then on each page you can specify who has access and which number(s) can be used. Each ministry could have their own *SMS Conversations* page. To learn more about creating pages and adding blocks check out the Designing and Building Websites using Rock guide.

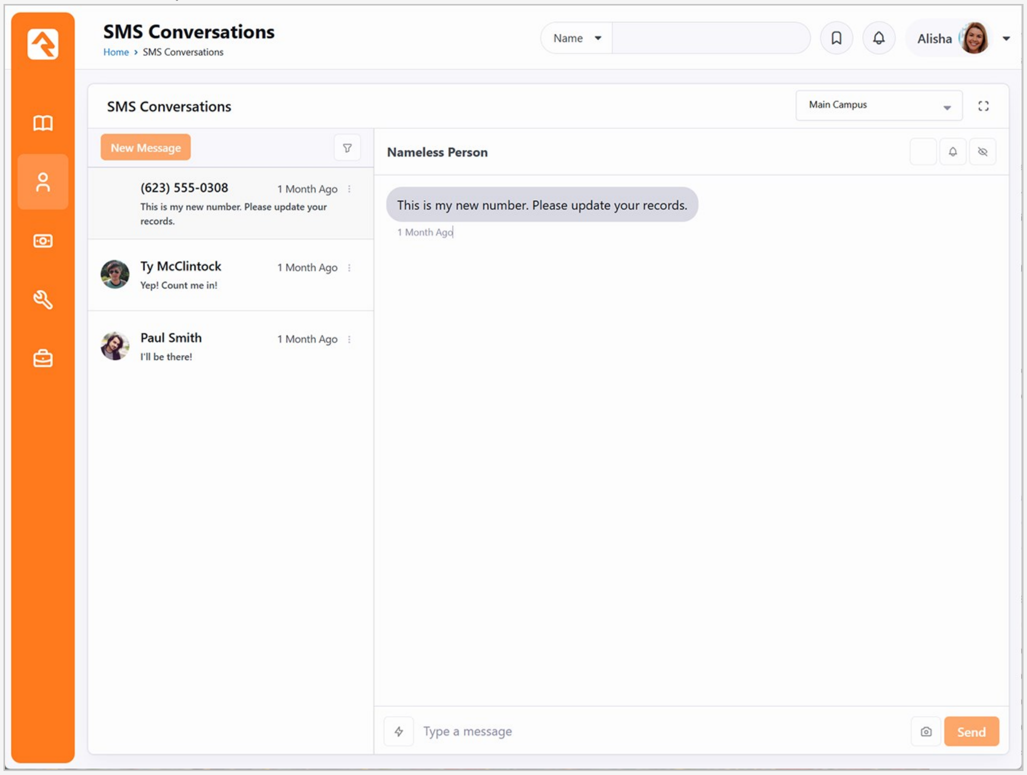
> **Real-Time SMS Responses**
> You no longer need to refresh the page to see new SMS messages. The system updates in Real-Time, displaying replies right away.

Nameless People

Sooner or later, you'll start receiving SMS messages from people and phone 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 your processes to continue as normal, without knowing their name or other contact information. In most cases this will result in the message being passed from the SMS Pipeline to the *SMS Conversations* page. Other possible actions are limited because we don't know who the person is.

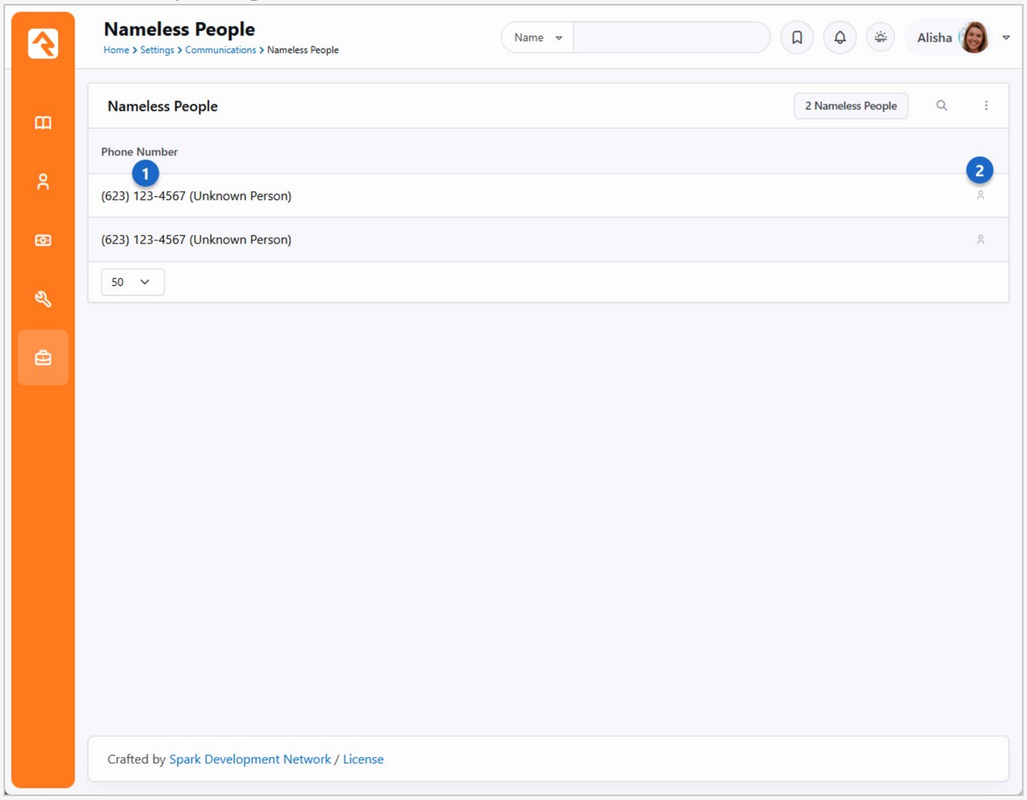
Nameless People in SMS Conversations



1. **Phone Number**
   Typically, a name is shown here. Since Rock doesn't know the person's name, you'll see the phone number 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 > Settings > Nameless People` to see and manage your list of nameless records.

Nameless People Page



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).

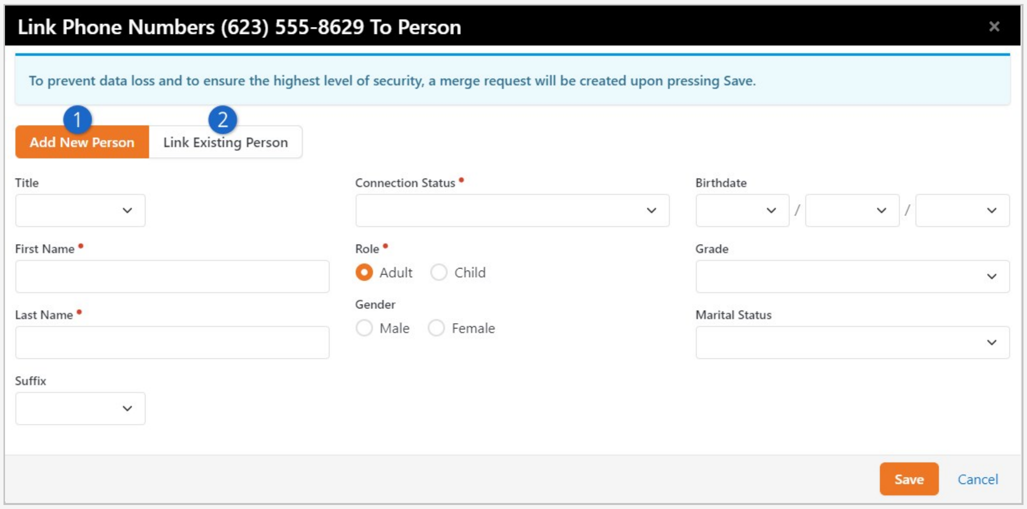
Where Did My Nameless Person Go?

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 in Rock. 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



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.

Respond from a Device

When you send an SMS message (see the Communication Wizard chapter) you'll select an SMS number to send from. When *Response Recipient Forwarding* is enabled as described earlier, 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.

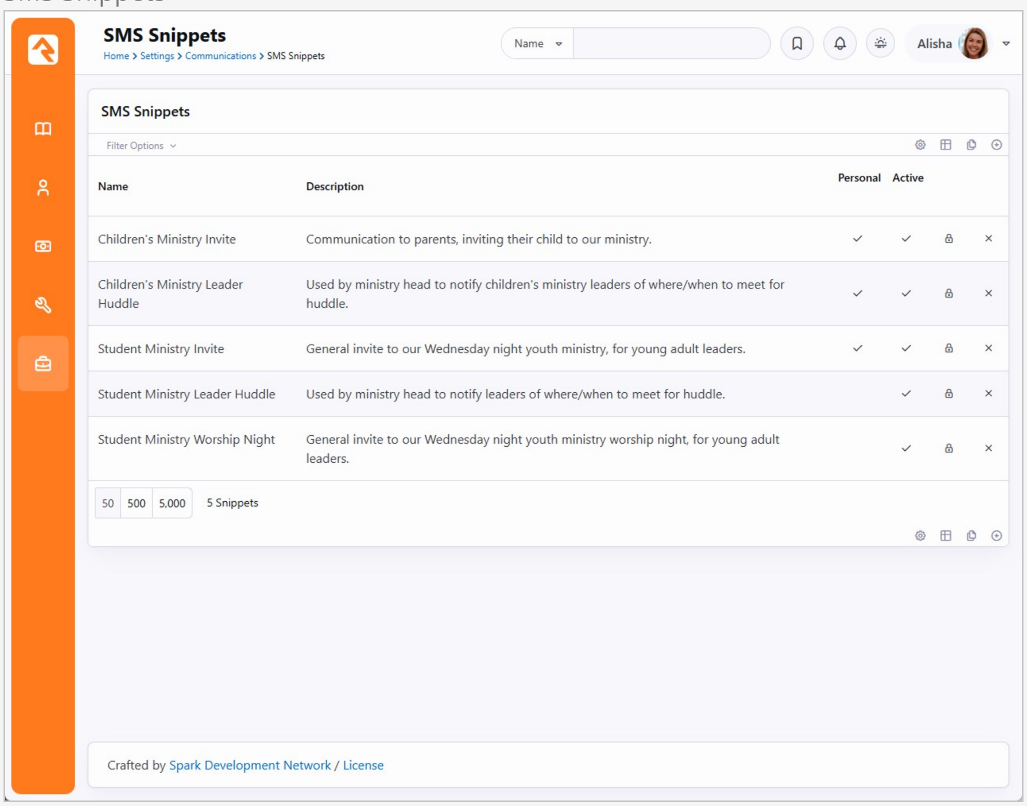
Notice that both sides of the conversation are texting to Rock's SMS number (555) 351-5392. Little does Alisha know that Jenny's real number is 867-5309.

SMS Snippets

The SMS Snippets feature allows you to streamline messaging by creating prewritten responses for future SMS conversations. Instead of typing repetitive messages manually, you can select from existing snippets directly within the *SMS Conversations* page and the Check-in Manager app (described in the `Checking-Out Check-in` guide).

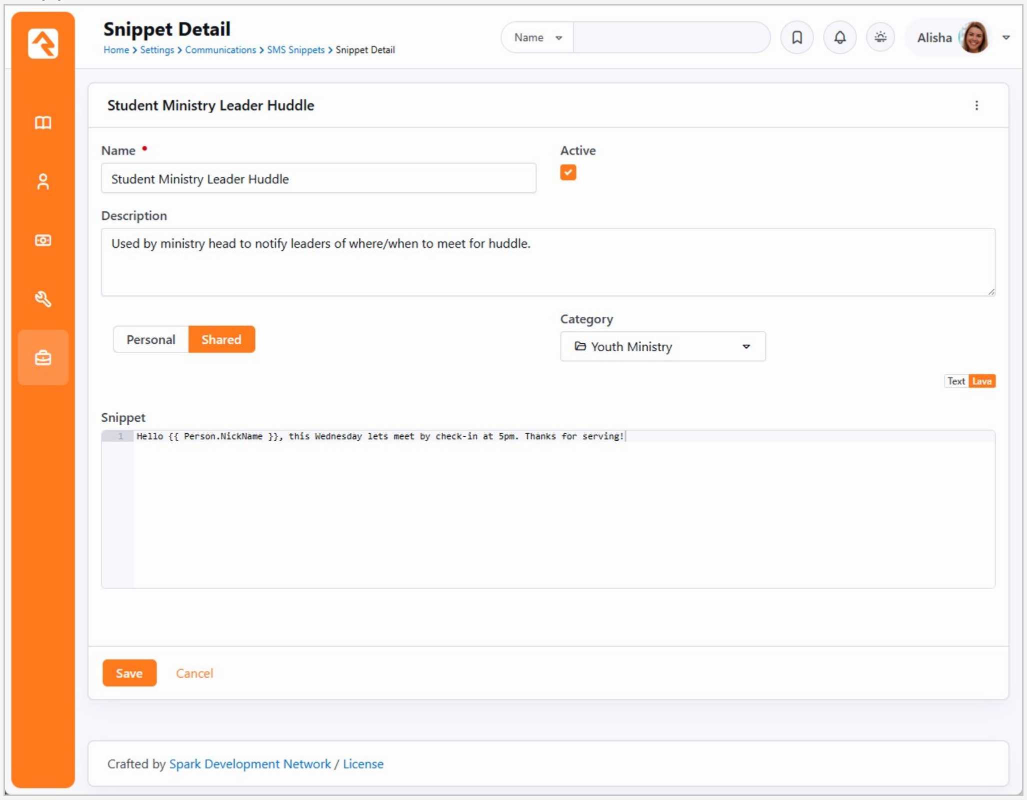
Go to `Admin Tools > Settings > SMS Snippets` to start adding snippets for your organization.

SMS Snippets



In the *Snippet Detail* view, you'll see everything that makes up a snippet—its content, settings and options for managing it.

Snippet Detail



Admins can configure snippets with either *Personal* or *Shared* access, categorize them, and customize their content using Lava (remember to toggle the `Text | Lava` switch).

- *Shared* snippets are available to your entire organization.
- *Personal* snippets are private and help you create quick, reusable prompts for yourself (e.g., *"Ted, don't forget to turn off the lights before you leave the building tonight!"*).

Snippet Categories

Using a lot of snippets? Keep them organized by creating categories in `Admin Tools > Settings > Category Manager`. Some blocks, including the one in the Check-in Manager's SMS feature, include a category selection setting. Configuring this ensures the right snippets are available in the right context.

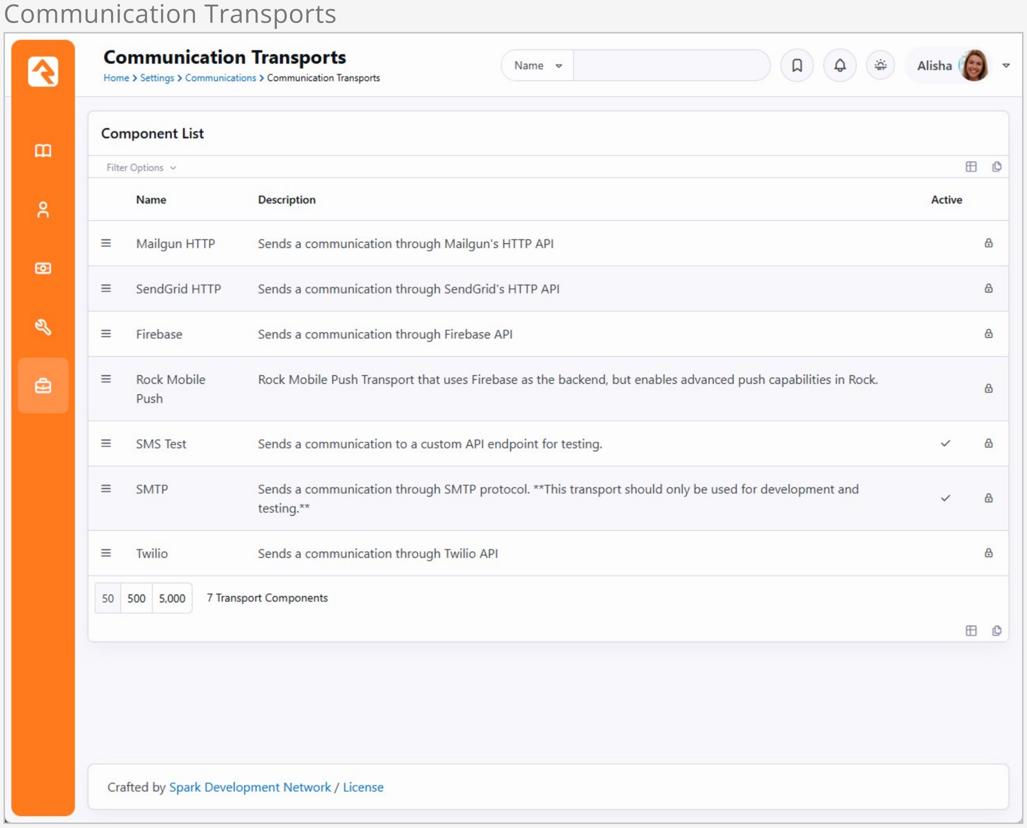
Configuring Email

When it comes to email configuration, much of the heavy lifting will be done outside of Rock. We have information in the Integrations chapter to help you with some of those processes. In this chapter, we'll cover the basic Rock settings you'll need to get email up and running. There are two main configuration areas, called Communication Transports and Communication Mediums.

Communication Transports

Communication Transports (`Admin Tools > Settings > Communication Transports`) are where you provide the necessary details for Rock to connect with your email service provider. These details are typically provided by your service. Check out the Integrations chapter for assistance with this setup.

Communication Transports

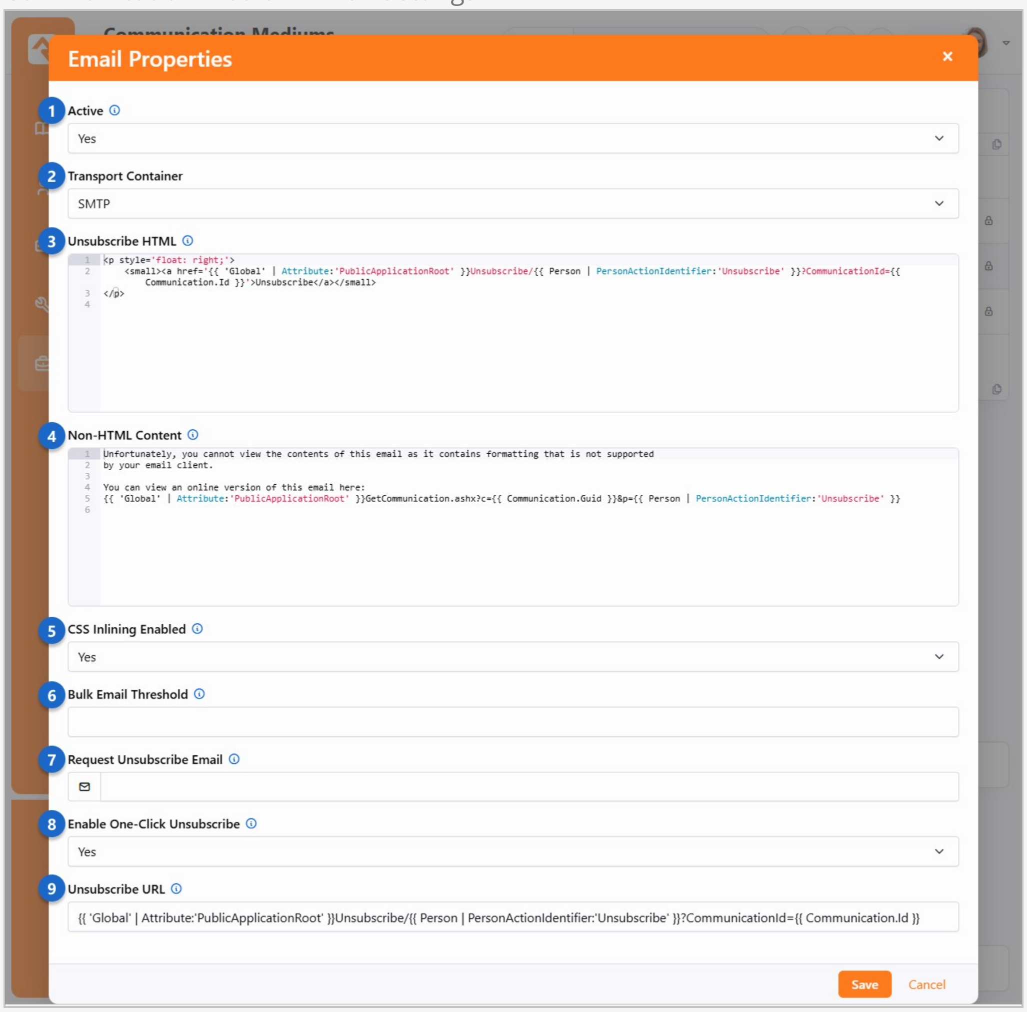


> **SMTP Relaying May Bite You**
> For development and testing you might decide to use SMTP as your transport. If you do, be sure that the server/service you use is configured to allow the Rock server to relay. If you're using Google Apps, see the tips in the Integrations section below.

Communication Mediums

Communication Mediums (`Admin Tools > Settings > Communication Mediums`) represent the available communication methods in Rock, including email.

Communication Medium Email Settings



1. **Active**
   Ensure this option is selected to enable email communication from Rock.
2. **Transport Container**
   Choose the email service provider you've configured in Communication Transports. This setting helps Rock know which service to use for sending emails.
3. **Unsubscribe HTML**

Customize the appearance and destination of the unsubscribe link in Rock emails. This link, at the bottom-right of the email by default, allows recipients to opt out of future communications.

If you're using Mailgun, be sure to check that your Tracking Settings in Mailgun are turned off, to avoid having two Unsubscribe options at the bottom of your emails.

4 **Non-HTML Content**
Provide an alternate message for recipients who are unable to view HTML emails. The recipient will see a generic message with a link to view the rich text email on your website. This ensures that all recipients can access the email content, regardless of their email client's capabilities.

5 **CSS Inlining Enabled**
Keep this option set to "Yes" for better email styling compatibility. Inline CSS styles enhance the visual presentation of emails across different email clients.

6 **Bulk Email Threshold**
Set a threshold to automatically designate emails as bulk when sent to more recipients than the threshold allows. The option to choose if an email is bulk or not will be removed when creating the communication. This helps manage email reputation and compliance with anti-spam regulations.

7 **Request Unsubscribe Email**
Specify the email address for unsubscribe requests. If left blank, the Organization Email in Global Attributes will be used. Because Rock always includes an API for processing unsubscribe requests (with Enable One-Click Unsubscribe enabled) the email option will probably never be used. However, it is required by email clients like Gmail. In the future, some email clients may choose to use this.

8 **Enable One-Click Unsubscribe**
Offer a convenient one-click unsubscribe option with a link at the top of the email. This enhances email credibility and complies with anti-spam regulations. It defaults to "Yes" which is the recommended setting.

9 **Unsubscribe URL**
Alternatively, provide a URL for unsubscribing. Clicking the unsubscribe link will redirect recipients to this page. This URL is only used if the Enable One-Click Unsubscribe option is turned off (which we don't recommend).

For more information on the "unsubscribe" settings, see the Unsubscribing section below.

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 > Settings > Safe Sender Domains`

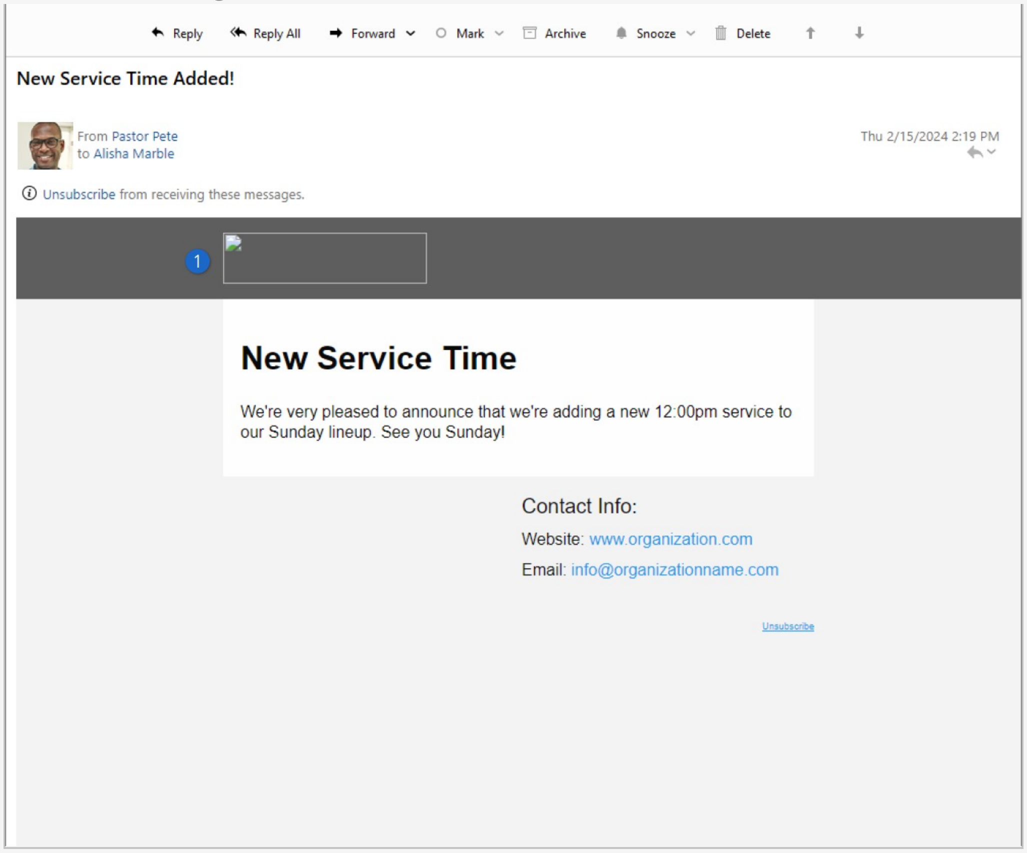
> **Adding Domains**
> Be sure that only your organization's domains are added to the Safe Sender Domains list. Adding gmail.com, yahoo.com, or any other domain you don't control or have SPF records for will result in your email being dropped because you'd be forging 'From' addresses.

Broken Images

If you're finding that some of your images aren't appearing in your email, be sure your Public Application Root setting is configured with the proper URL. This can be modified under:

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

Broken Email Image



1 **Broken Image**
An email containing an image that can't be found due to a misconfigured Public Application Root may look like this.

Your Public Application Root will be formatted like `https://www.organization.com/` or `https://rock.organization.com/` or similar, depending on your web address. Note that the forward-slash at the end is required.

Unsubscribing

Configuring email in Rock involves more than just sending messages; it's about about balancing access to your people's inbox while maintaining a positive sender reputation. Why? Because when your emails are unsubscribed from, it can harm your reputation and impact whether your messages reach their intended recipients.

Consider this: even if someone signed up for your emails, they might still report them as spam if they can't easily find the unsubscribe option. Or worse, they might start to unsubscribe but then resort to marking your emails as spam if the process isn't straightforward. That's why it's crucial to make unsubscribing as effortless as possible.

This is especially true for Gmail accounts. Gmail specifies that everyone must *make it easy for recipients to unsubscribe* and *if you send more than 5,000 messages per day, your marketing and subscribed messages must support one-click unsubscribe*. Gmail also indicates that if your unsubscribe method involves sending an email, the request to unsubscribe must be processed within two days. Why all the focus on Gmail? Well, with over 1.5 billion active accounts, it’s probably used by many in your target audience, so we want to ensure we're sticking to their guidelines.

> **Learn More**
> To read more about Gmail’s spam requirements, with links to additional resources, check out our blog post on the topic.

We also look to Gmail's rules because they will help cover you from a legal perspective. Gmail policies are more stringent than the US CAN-SPAM Act, which also has requirements related to unsubscribing. Adherence to the CAN-SPAM Act is crucial. Otherwise you expose your organization to potential legal action and hefty fines from the FTC.

Now, let's talk about how Rock can help you comply with these requirements. We've designed features to streamline the unsubscribing process. For more details on these settings, see the Communication Mediums section above.

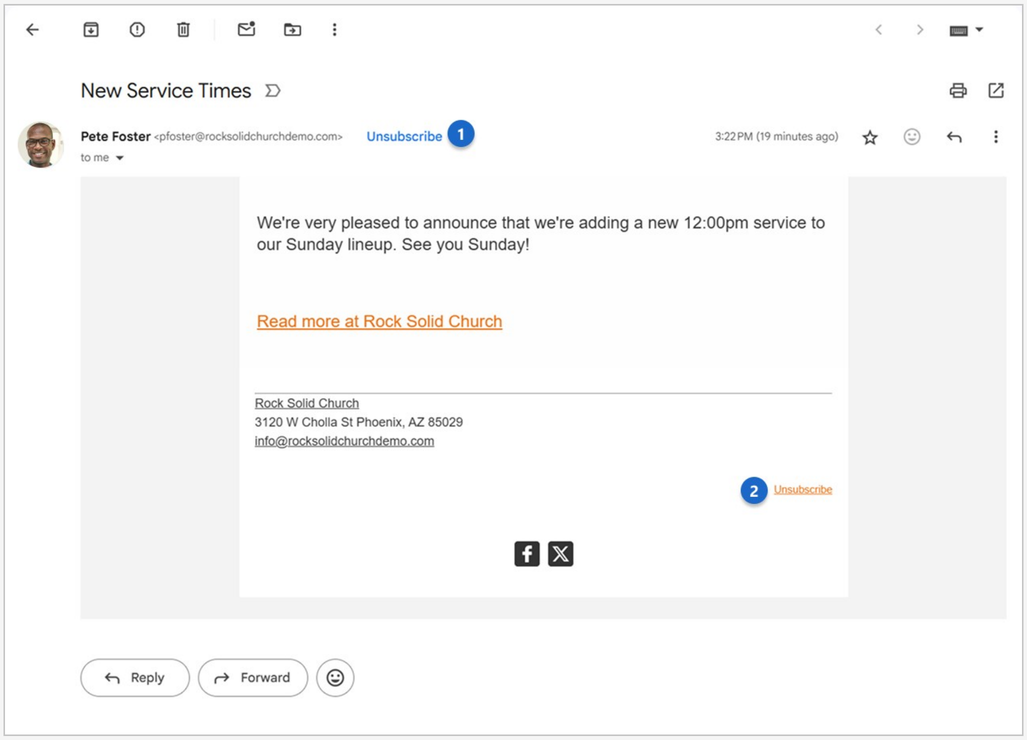
Email Unsubscribe Settings

1. **Bulk Email Threshold**
   Automatically categorizes emails as bulk if the recipient list exceeds this threshold, ensuring unsubscribe links. This hides the bulk option for new communications.
2. **Request Unsubscribe Email**
   Generates an email for unsubscribing, which must be processed within two days. If Enable One-Click Unsubscribe is set to "Yes" (which we recommend) this email address should never be used.
3. **Enable One-Click Unsubscribe**
   Our recommended default setting of "Yes" is in line with Gmail's requirements.
4. **Unsubscribe URL**
   Provides an alternative to one-click unsubscribing, directing recipients to a specified URL.

> **Not Gmail-Compliant**
> If Enable One-Click Unsubscribe is set to "No" and if the Unsubscribe URL is blank, nothing will be added to the header of the email.

With the above configuration in place, your emails will have an "Unsubscribe" option as pictured below.

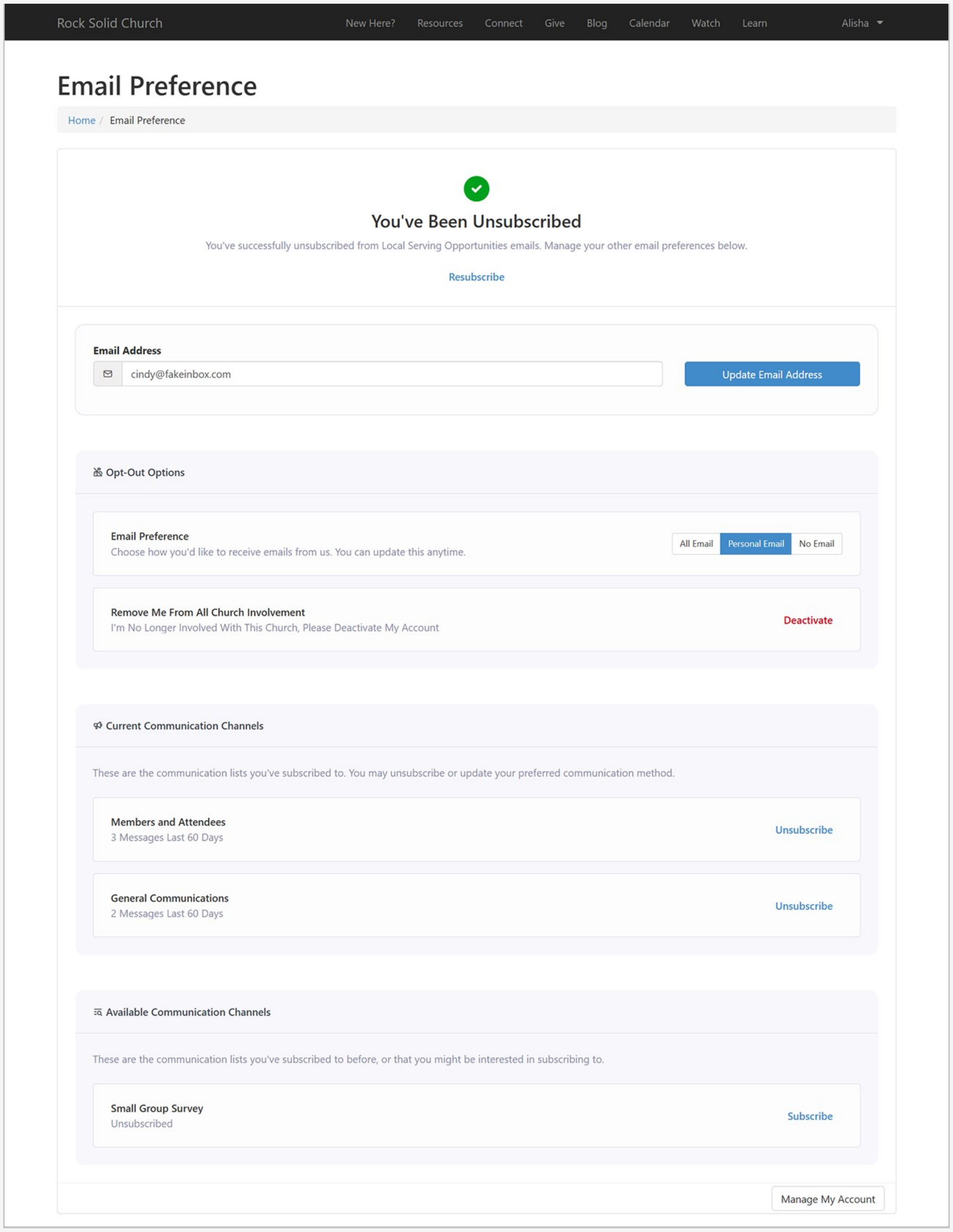
Email Unsubscribe - Gmail



1. **Header Unsubscribe**
   Supports one-click unsubscribe functionality, though it's not universally supported by all email clients.
2. **Unsubscribe Link**
   Directs recipients to the Rock Unsubscribe page on the external site. Some clients support one-click unsubscribe functionality, though it's not universally supported by all email clients.

When someone is taken to the Unsubscribe page on the external site, they'll see the page pictured below. Upon arriving at the page, they can proceed to set their email preference.

Email Preference - Unsubscribe Mode

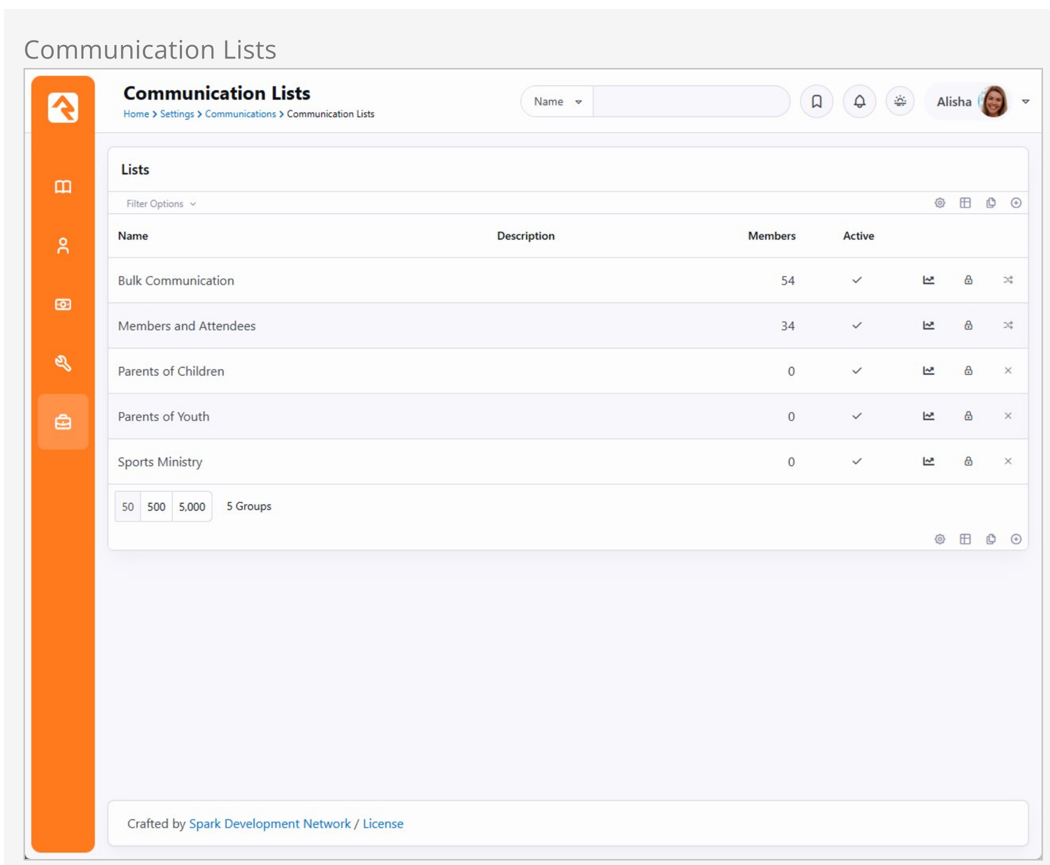


For more on setting subscription preferences, see the Communication Preferences section below.

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.

Communication lists can be found in the *Communication Lists* screen, located at: `Admin Tools > Settings > Communication Lists`.
Click the name of a list to view its members or modify its settings.



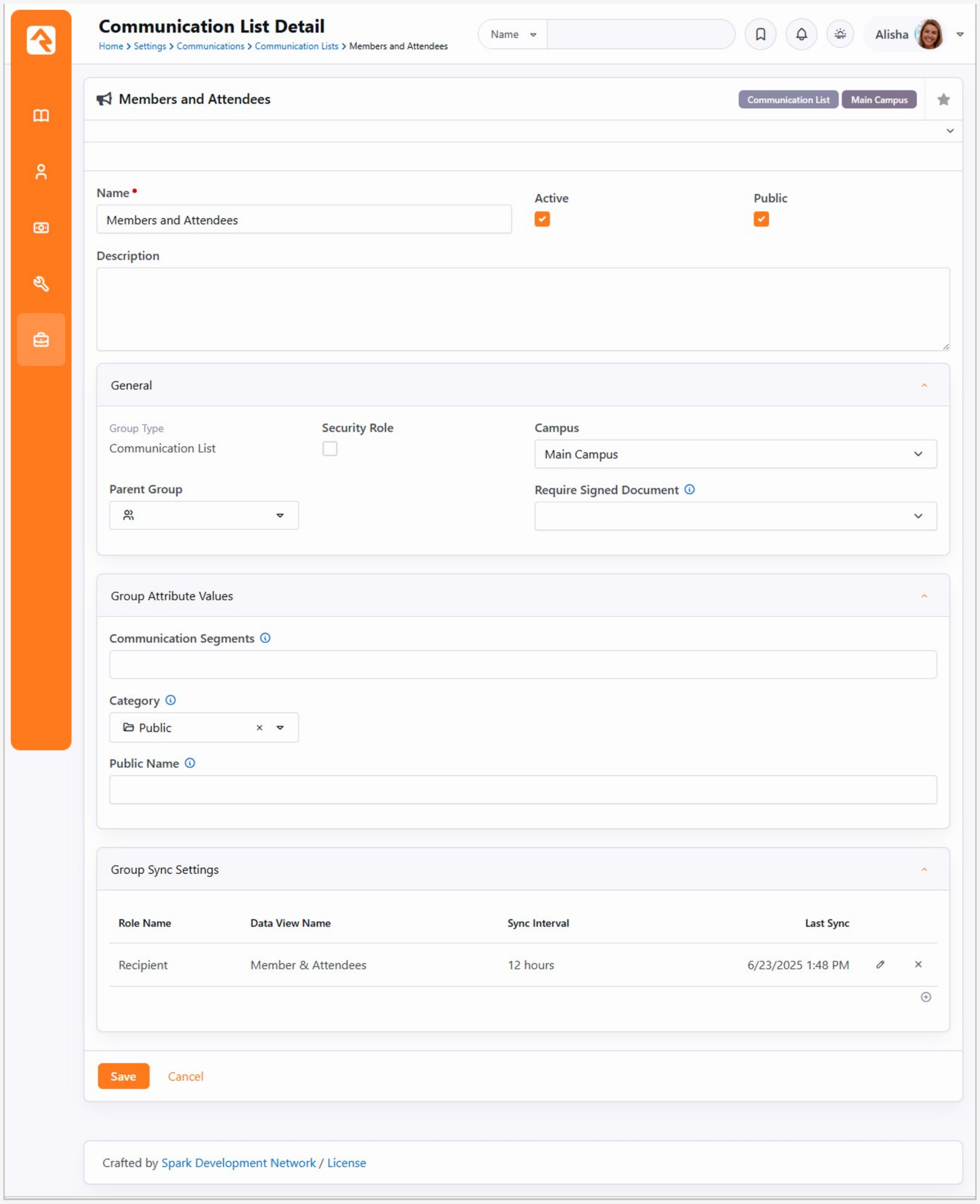
Rock ships with the following four lists:

- 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 Rock's 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.

Communication List Detail



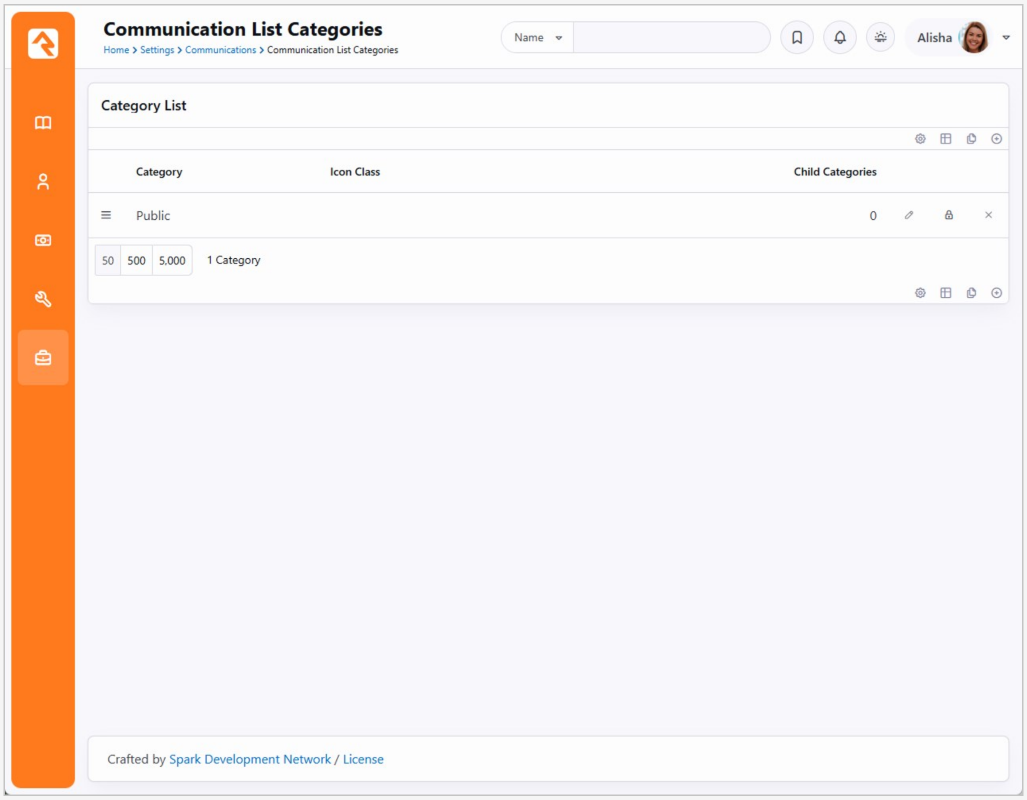
As you can see, the *Communication List Detail* screen offers a lot of options and flexibility for creating your communication list. To make your new list available to members viewing the *Communication List Subscribe* block on your external site, be sure to click the *Public* checkbox. (To learn more 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 *Communication List Categories* page is located at `Admin Tools > Settings > Communication List Categories`.

Communication List Detail



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.

Keep in mind that the category's security will be used to decide if the individual can see the communication lists associated with that category. This means an administrator can set up a new category (e.g., Staff) and then add security to that category such that people with access to view that category will be able to see any communication lists that are tied to that category. Don't forget, the admin would have to configure the *Communication List Subscribe* block's settings with the new category.

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.

For The Communication Wizard v1:
Data views can be created, modified and deleted in the *Communications Segments* category of the *Data Views* screen, located at `Tools > Data Views`. For more information about data views, see the Filtering Using Data Views section of the `Taking Off with Reporting manual`.

For The Communication Wizard v2:
Create new *Personalization Segments* in `Admin Tools > CMS > Personalization Segments`. Just be sure the segment’s category matches the Personalization Segment Category specified in the block settings. For more details on working with segments, check out the Personalization Segments chapter of the `Designing and Building Websites Using Rock guide`.

> **Switching From Communication To Personalization Segments**
> As of v17, the v2 Communication Wizard (Preview) is released, changing the way *Segments* function. The Data Views you used for segments in the past can be easily used as Personalization Segments. The best part: Personalization Segments give you more control. You can now use Session Filters, Page View Filters and more to refine your communication list.

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

Communication Wizard (Legacy)

> **Communication Wizard (Legacy)**
>
> Looking to read up on the legacy version of the Communication Wizard? You can find it in the legacy documentation. The updated Communication Wizard offers a refreshed experience with enhanced features—read on to learn more.

Communication Wizard

When you think of a robust, efficient, all-in-one communication platform... your mind may have drifted towards your daily drivers like *Brevo*, *Mailchimp* and *Beefree*. You may like their features: a drag-and-drop email builder, templates, customization, personalization, analytics, etc. You may have even jumped between services to get the feature list you desire. Are you tired of jumping? Are your legs wearing out? No more jumping. Rock has you covered on all communication fronts.

Why choose Rock for communication?

- You have access to all your data to empower personalization
- All interactions with communications are stored in your database
- No integration needed

The wizard works just like you'd expect, guiding you step-by-step with forward and back buttons. Let's walk through how to send a communication using the wizard.

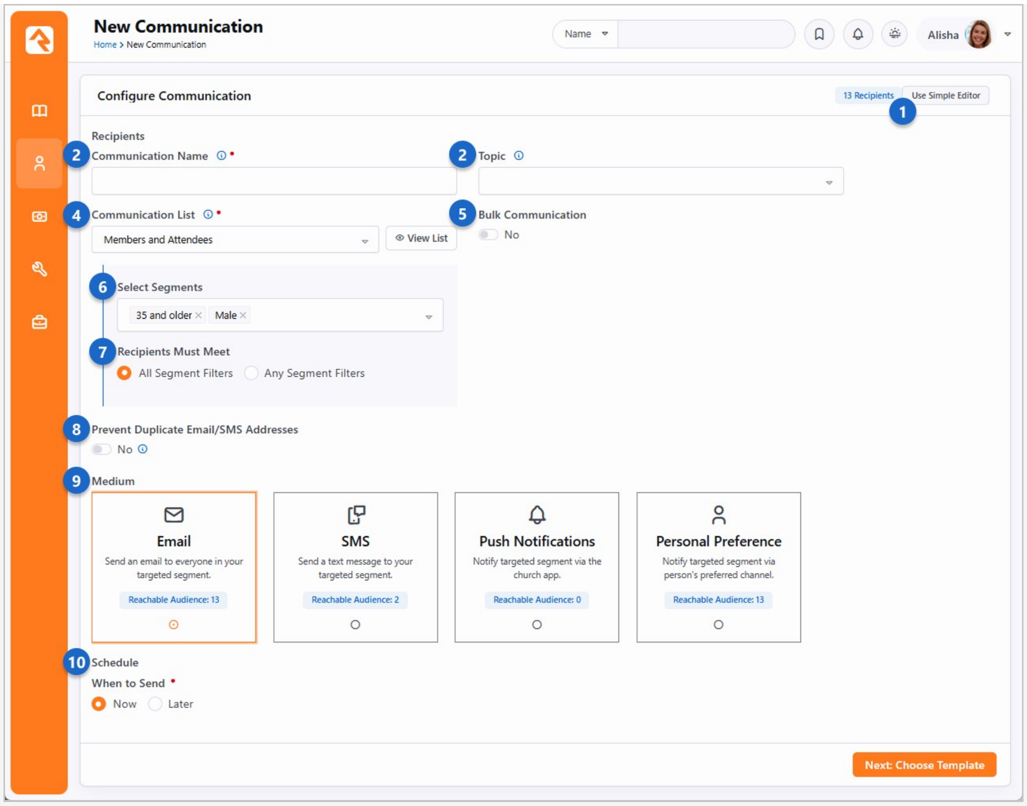
Sending a Communication Using the Communication Wizard

To begin a new communication, go to `People > New Communication`. The first screen you'll see, pictured below, is where you'll pick who you want to send the communication to.

There are many ways to arrive at the Communication Wizard,

- Select from a grid
- Navigate to the page yourself then you can:
  - Add individuals manually with a *Manual Recipient List*
  - Use a Communication List

List Selection



1. **Use Simple Editor**
   Click this button to launch the Simple Editor.

2. **Communication Name**
   This is the name of the communication you're sending, for internal use only, to help you identify which communications were sent as you look through your history of communications. The name you provide here will not be included in the communication you send.

3. **Topic**
   Specify which campaign or communication topic this falls under (e.g.: Missions Update). This is used to group communications, making them easier to find in the future. You can update *topics* in `Admin Tools > Settings > Defined Types > Communication Topic`.

4. **Communication List**
   If you want to select individual recipients manually, you can do that here. This lets you create a list of people without using a configured Communication List. If there are more than 1,000 recipients you'll only see a summary of those who may not receive the communication because, for instance, they don't have an email address or SMS phone number.

5. **Bulk Communication**
   Here you choose if it's a bulk (group) communication. When you enable this option, Rock includes a link for the recipient to unsubscribe. Recipients can opt-out of bulk communications as well. You can change the default for this option in the block settings, but we recommend leaving it on. Note, this will be hidden and automatically enabled if the recipient count exceeds the threshold set on the *Communication Mediums* page. See the Configuring Email chapter for more information.

6 **Segments**
The *Segments* feature lets you filter people in the *Communication List* according to your selections. For instance, you could apply the '35 and older' segment to only communicate with people from the 'Members and Attendees' list who are 35 and older. Only segments under the *'Communications'* category are shown. This category can be adjusted in the block settings. To learn more, see Segments.

7 **Recipients Must Meet**
If you've chosen more than one *Segment* then this lets you decide if the people who receive the communication should meet all of the segment requirements, or any one of them.

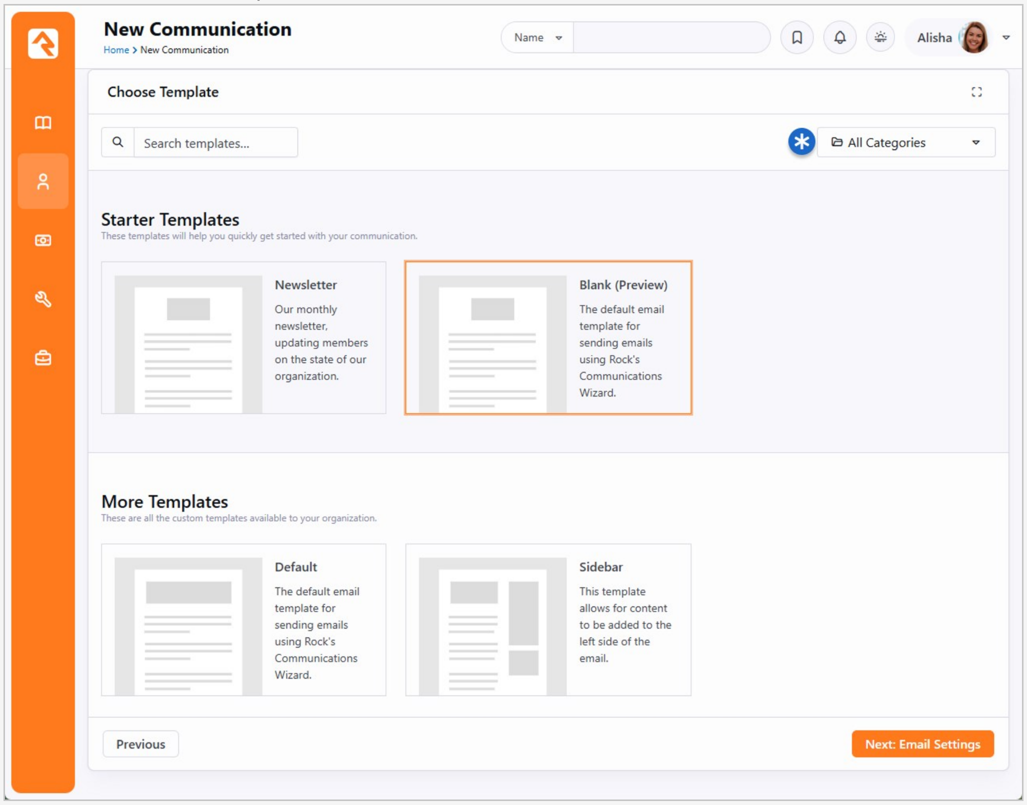
8 **Prevent Duplicates**
This setting is only visible if enabled in the block's settings. People within a family will often share an email address or SMS phone number. Selecting this option will cause only one communication to be sent per email address or phone number. For instance, if spouses share an email address, then only one of them will receive the communication, personalized to that person. In most cases you don't want this set as the communication will be personalized to only one of the recipients.

9 **Medium**
The options you see here may vary depending on your Rock configuration/data. In this case we can choose to send an email, an SMS text message or a push notification. Or we can send it using different mediums based on each recipient's communication preference.

10 **Schedule Send**
Select when a communication sends, even down to the minute. By default, the communication will be sent immediately after it has been created (and approved, if applicable).

Click `Next` to advance to the *Choose Template* screen. This is where you'll select the email 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.

Communication Template



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`.

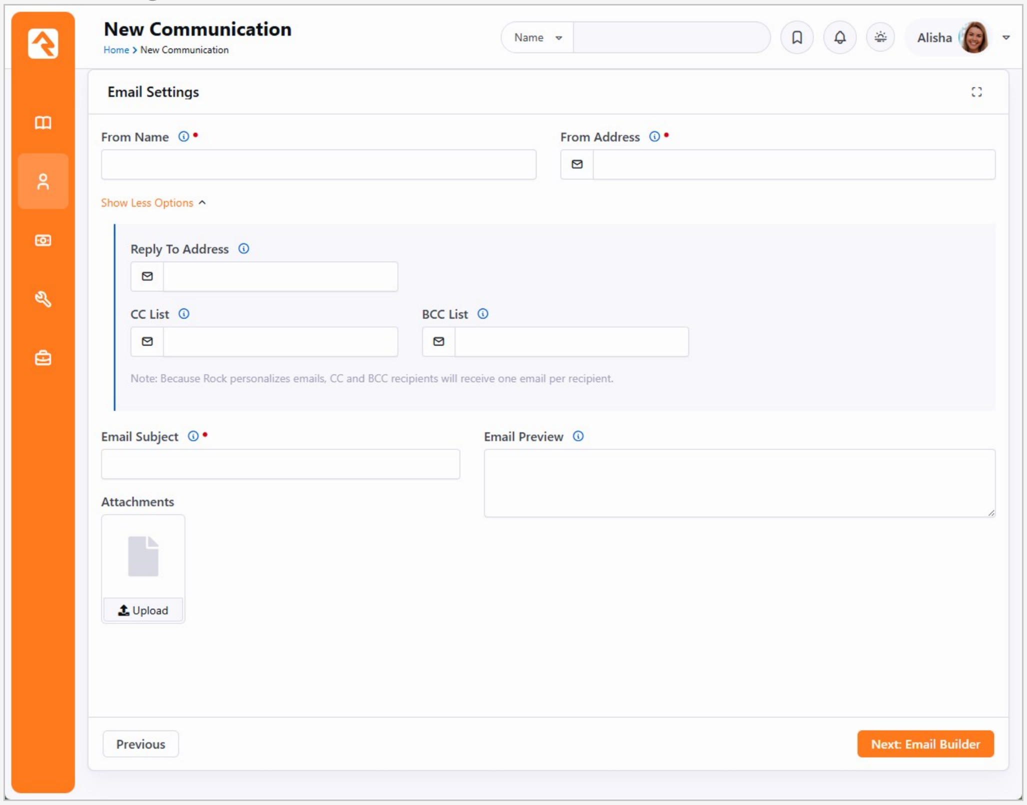
Rock ships with these three templates out of the box, but the list will expand as you create your own. Remember, these templates are a starting point for your communications, later, you can customize them to your heart's content.

Once you have a well-crafted email, SMS message or push notification, you can use it as a template. To learn more, see the *Templates* section below.

> ### Starter Templates
> To save your template under *Starter Templates*, find your desired template in the *Communication Templates* settings and check the box *"Is Starter"*. Also you can select Starter when saving a new template. Pick the 20% of templates you use 80% of the time.

After selecting your template, click `Next` to advance to the *Email Settings* screen. This is where you specify the sender, the subject and any files you want to attach to the message.

Email Settings



CC, BCC and Personalization

If you use the CC or BCC fields, be aware that each communication is personalized for each recipient, so each email is unique. That means your CC/BCC recipients will receive many messages. Be careful about providing a value here as the recipient can get overwhelmed.

Click `Next` to advance to the *Email Builder*. If your communication will be sent by SMS or Push only, then the wizard will skip this screen.

Email Builder

If you spent time coding your email templates in the past, get ready to take a big sigh of relief. The *Email Builder* gives you complete creative freedom, with no coding involved (unless you want to) and you can save your build as a template! There are three unique screens (Blocks, Sections and Styles) used to configure your email with simple drag-and-drops.

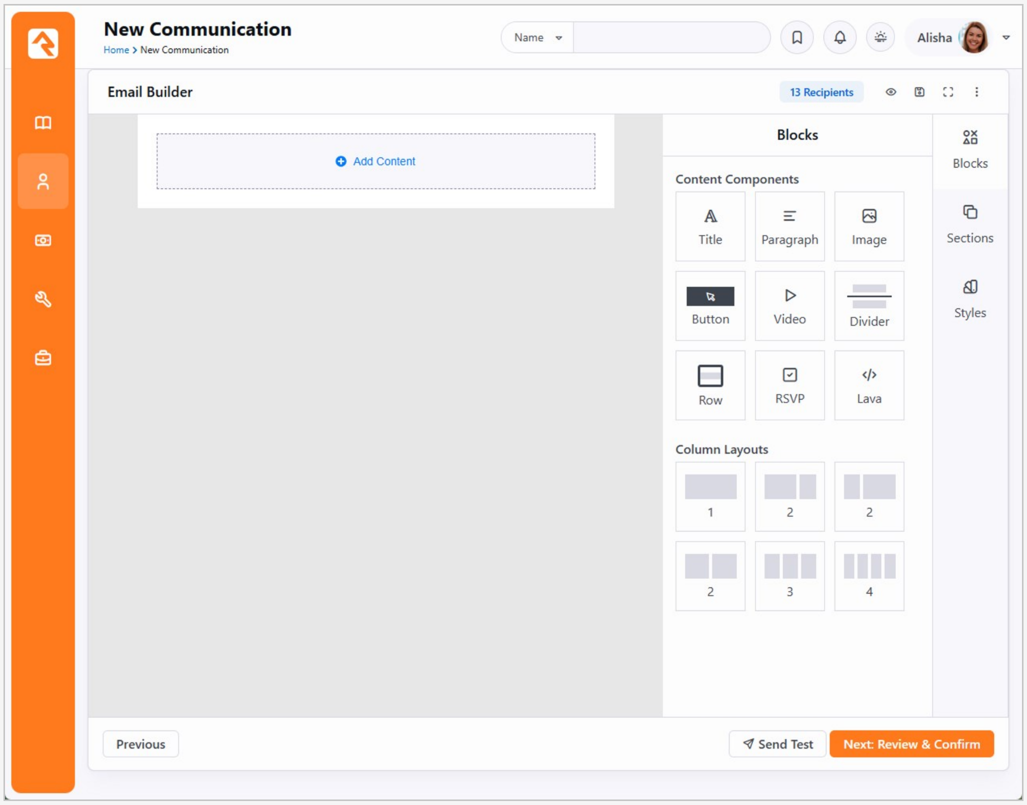
Blocks - Drag-and-drop email content directly to quickly structure your email.

Sections - Create or re-use groups of content, streamlining email building.

Styles - Customize the style of your email from the text to the buttons.

Blocks

Blocks



Blocks are the content components themselves. To add an element, simply drag it from the *Blocks* bar to its resting place in your message.

Content Components

Once you place a component, you can click on it for editing. Try implementing *Lava* to add a personal touch, change how round your button corners are or insert image and video with ease.

After placing a component, you can edit it by clicking on the section it's in. The options associated with that component are displayed on the right side of the screen. Notice that the section you're editing is highlighted with a blue border, and you can view your changes in real time. If you want more of a component or layout, once you have selected one, click . If you decide you don't want that element after all, click .

Column Layouts

Column Layouts group content in an elegant format. They can be edited to display unique column spacing and alignment. Each layout can be saved as a *Section* for re-use. That means not only is the format saved, the content is saved as well. More on that below.

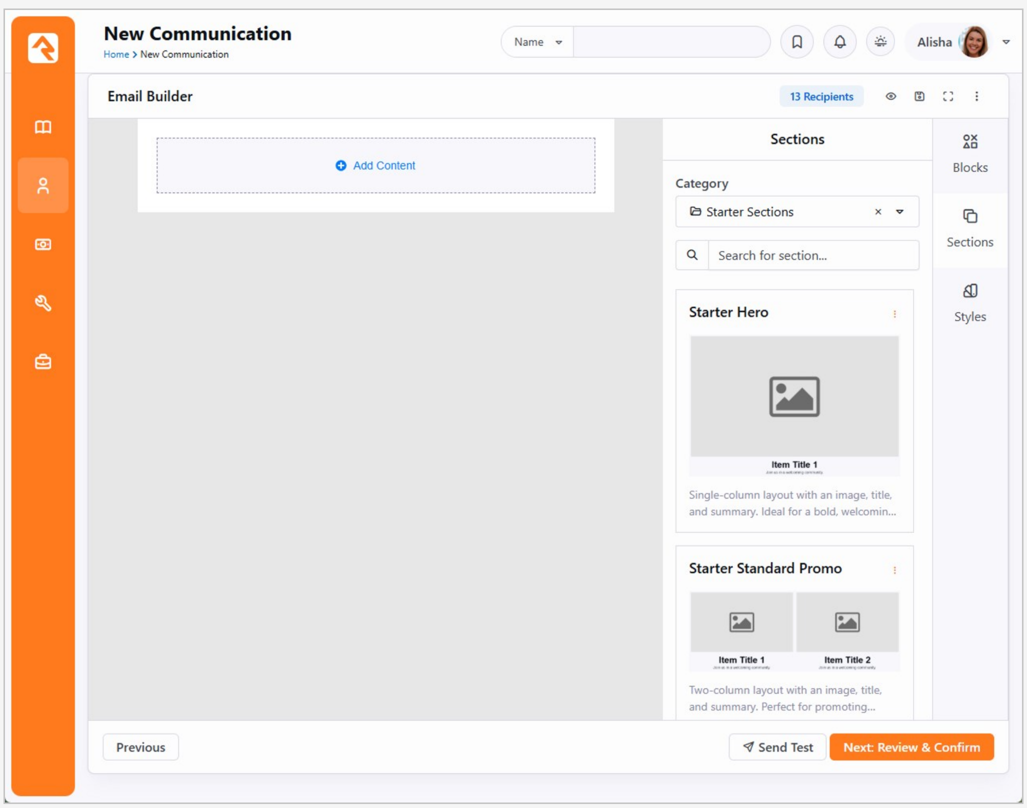
At any point while working in the *Email Builder*, you can send a test email to yourself by clicking the `Send Test` button. Click to see both desktop and mobile previews of your design. Click to save a draft of your email. Select the ellipsis () in the top right to save your built email as a template.

> ### RSVP Button Setup
> 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`.

> ### Adding Videos to Email
> Because of how different email clients work, we can't reliably embed a video within an email. Using the *Video* component will let you provide a link to a video, with an associated image, but the video can't play from inside the email itself. Instead, viewers are redirected to your video hosting provider (e.g.: YouTube, Vimeo and Wistia).

Sections

Sections



Sections house groups of content that speed up and structure your email building. Drag one in, and you've saved yourself from some serious work.

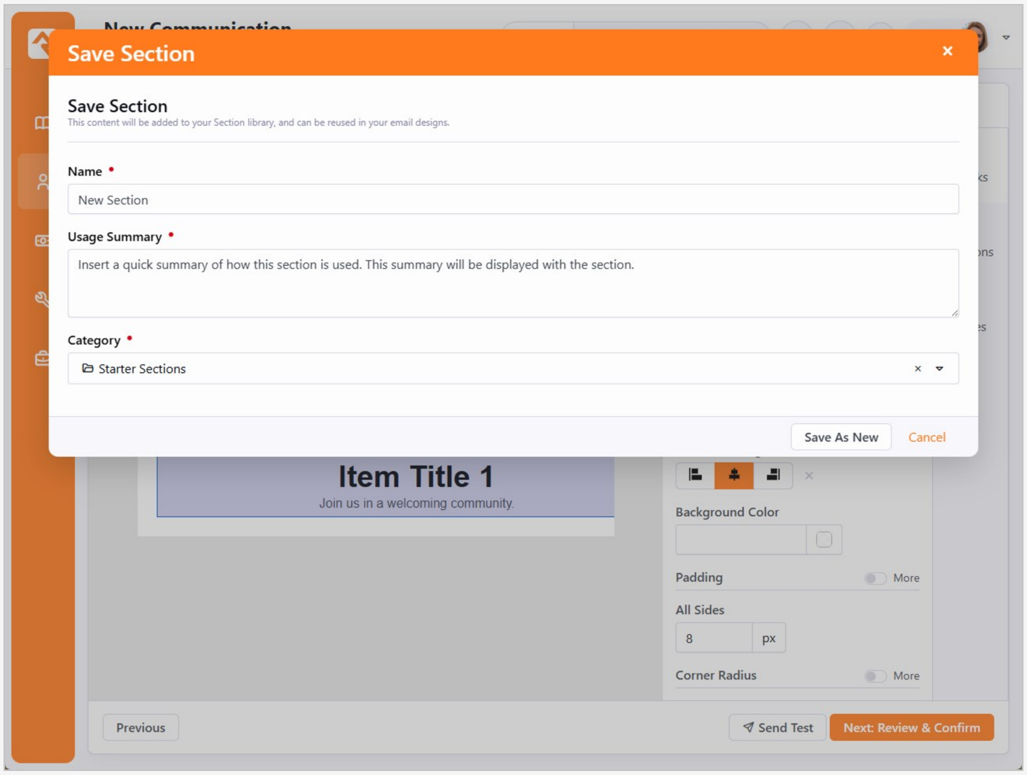
When to use a section:

- If you have a unique paragraph with lots of Lava

- When using a common "Hero" section
- For an often-used header or footer

This can be done quickly by selecting a column and clicking `Save`, the following screen will pop up.

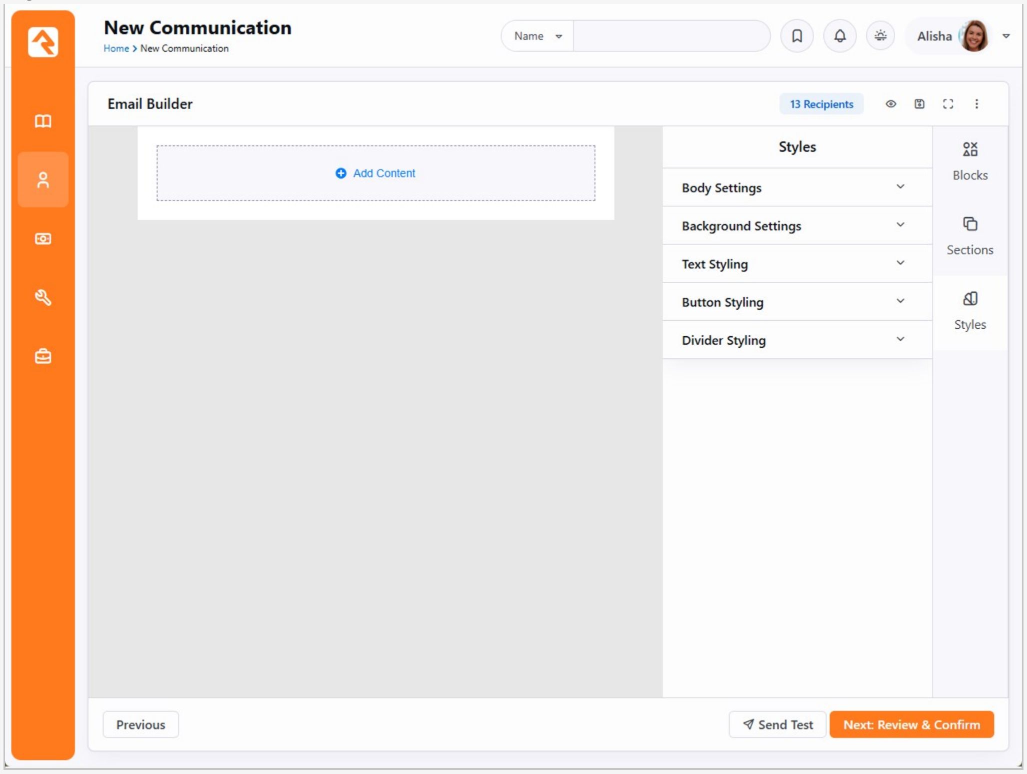
Save Section



Save yourself some trouble by adding a *Name* and a *Usage Summary*, which describes the intended use of your section.

Styles

Styles



Styling is where you, well... style your email. Each change you make here will affect the entire email, giving you consistent style from top to bottom.

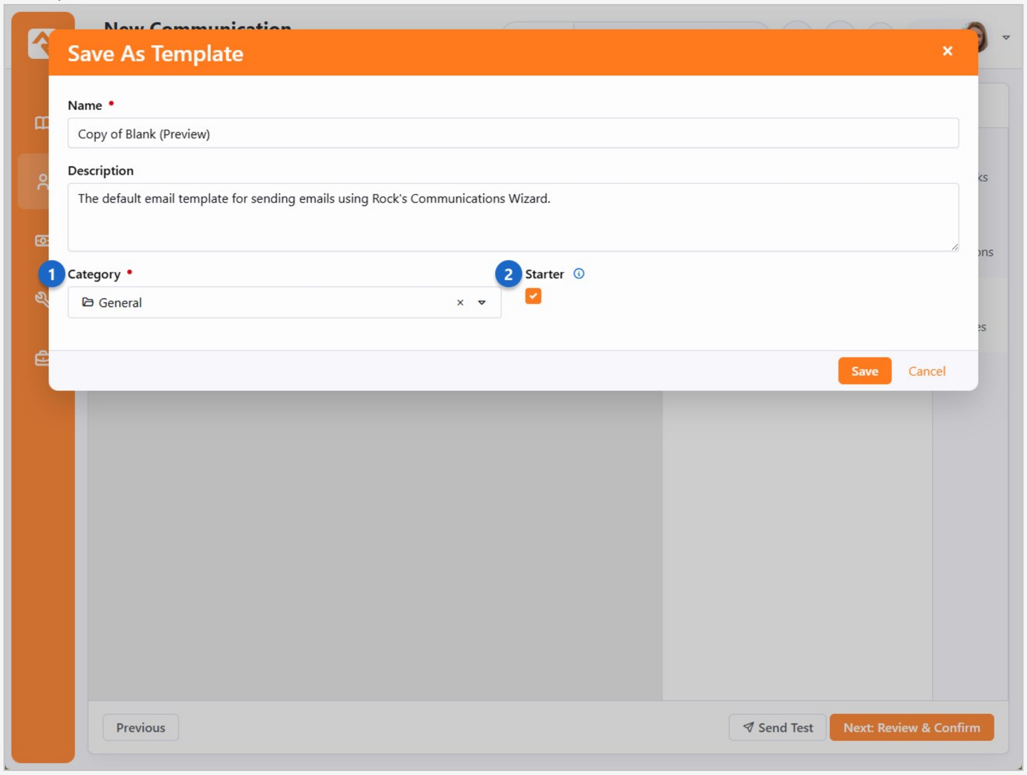
This allows you to select the overall design of your email and provide default values for things like heading, text and buttons.

- **Body Settings**
  Configure the color, alignment and spacing of the body.
- **Background Settings**
  Change your background color or upload an image to alter your email's backdrop.
- **Text Styling**
  Edit text font, size and color globally, or refine styling for each heading.
- **Button Styling**
  Globally alter button color, font, padding, size and even corner radius.
- **Divider Styling**
  Change the style, color, alignment and size of each divider.

Templates

You can now save your built email as a template, no more HTML coding! Communication is rinse and repeat, when you save this template it will take a screenshot as a thumbnail, and you can access this layout in the future with ease. To start, select the ellipsis in the top right (), then *"Save As Template"* to open the *"Save As Template"* screen.

Template



1. **Category**
   When you have a lot of templates, categories simplify the search process. To add a new one, navigate to `Settings > Communications > Communication Template Categories` and click .

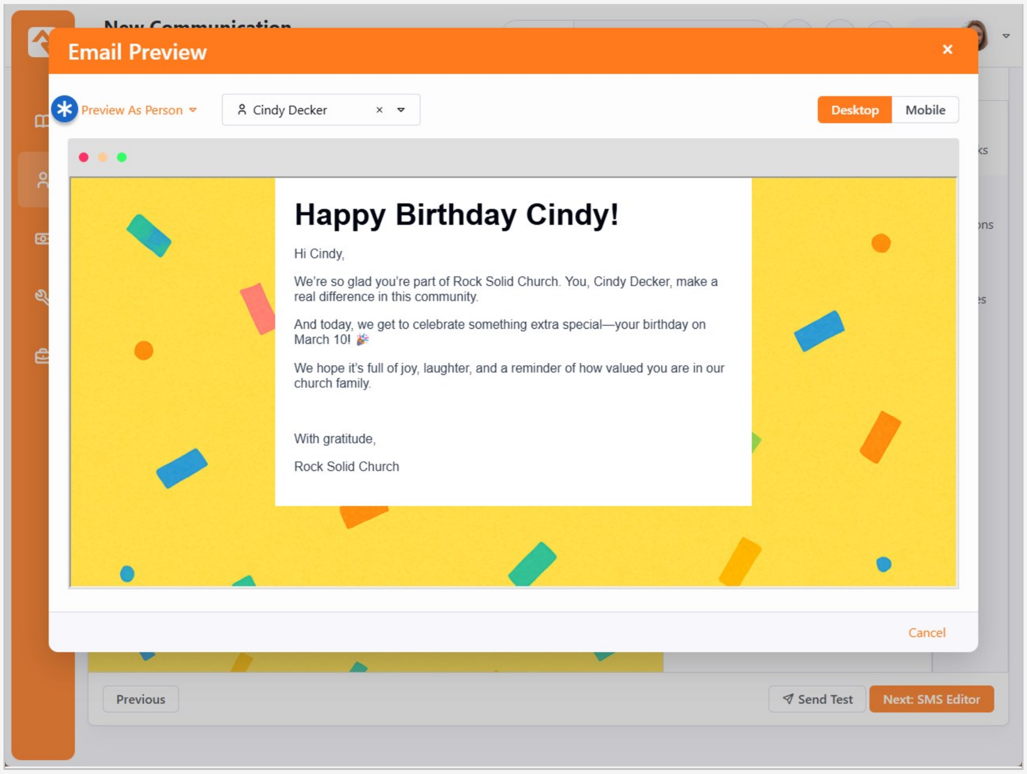
2. **Starter**
   Starter Pins the saved template to the top of the selection screen for the chosen *Category*. We suggest you only make your most used templates a starter, the 20% of the templates that you use 80% of the time.

Preview As

By selecting the icon, you can preview any communication in Rock. To add a personal touch, you can even view it as a specific person in your database, or even a segment, giving you the opportunity to test personalization features such as Lava or Adaptive Messages.

Preview As Person

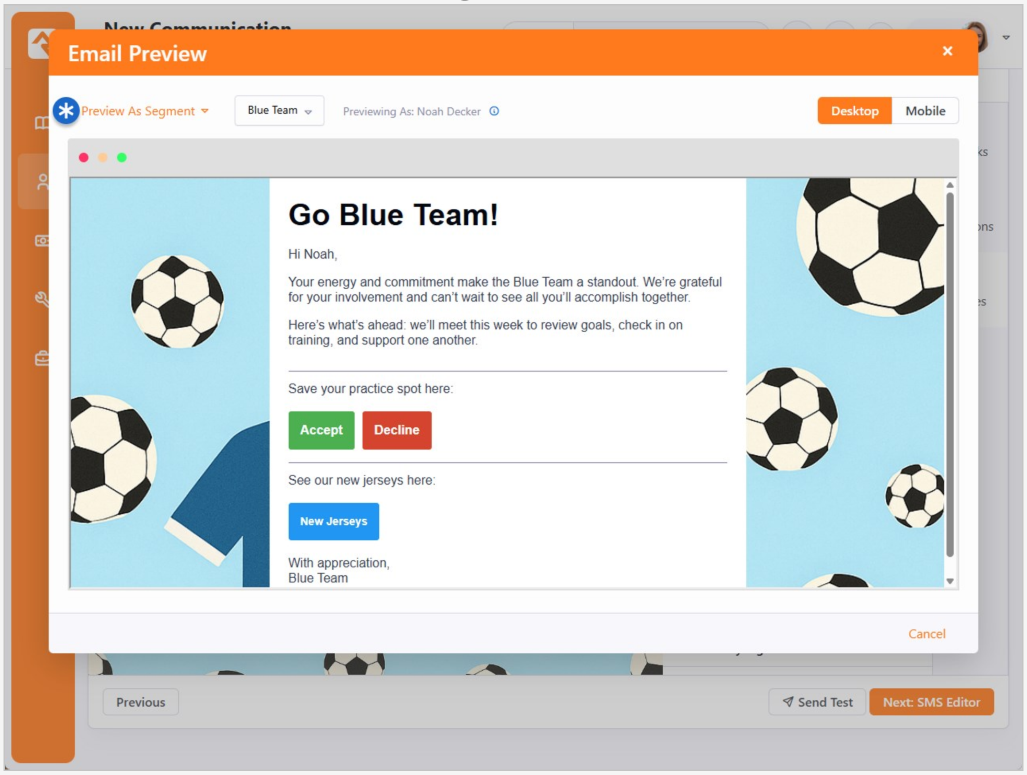
Communication Wizard Preview As Person



Select an individual with the handy picker and see exactly how it will look in their inbox.

Preview As Segment

Communication Wizard Preview As Segment



When a segment is selected, the system will display a preview using a random person from that segment. Note that this individual may not be an actual email recipient. They may also belong to multiple segments, which could influence how personalization appears in your preview depending on your settings.

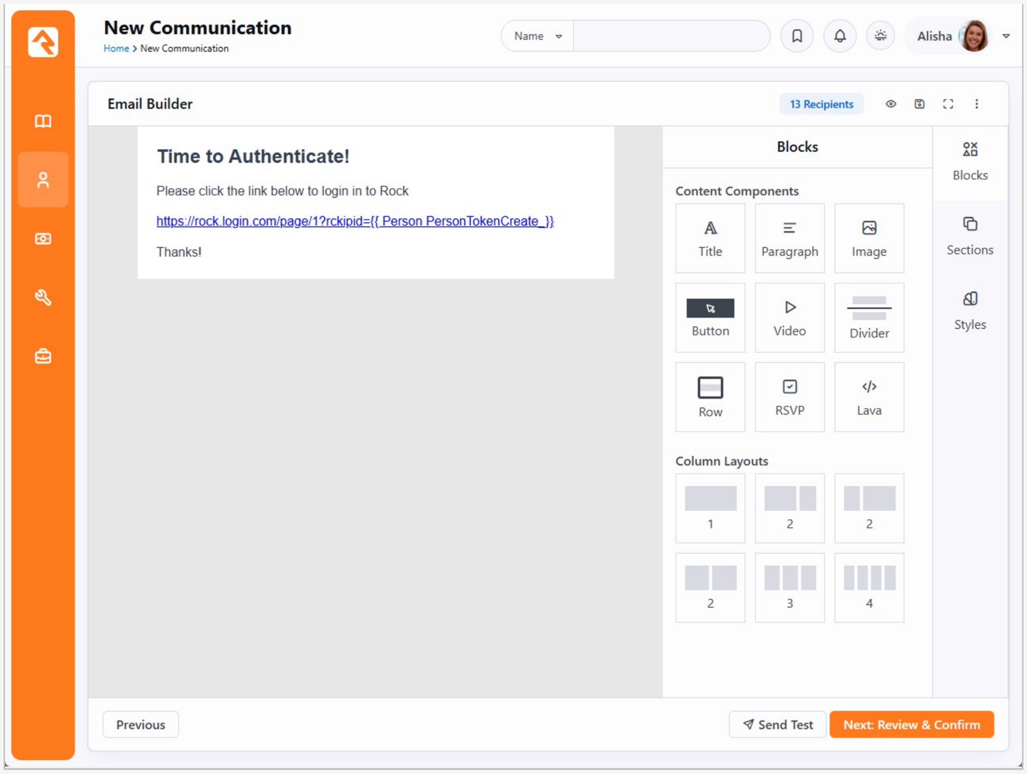
Emailing a Login Link

As you're crafting your communication you may find it necessary to include a link that will automatically log the person in to your website. This is easy to do using the PersonTokenCreate Lava filter.

Simply add `?rckipid={{ Person | PersonTokenCreate }}` to the URL of the page you want the person to visit.

The example pictured below will log the person in and take them to the external site's homepage using a URL of `https://yoursite.org/page/1?rckipid={{ Person | PersonTokenCreate }}`.

Email Link with Person Token



A link like the one pictured above can be added to your email by using the button near the top of the editor. Unlike the example above, you'll want to provide friendly text for the link (e.g., "Click Here") instead of the URL itself. Using the URL as pictured above would result in a very long and ugly looking link in the recipient's email.

You can optionally add parameters to your *PersonTokenCreate* filter, to control:

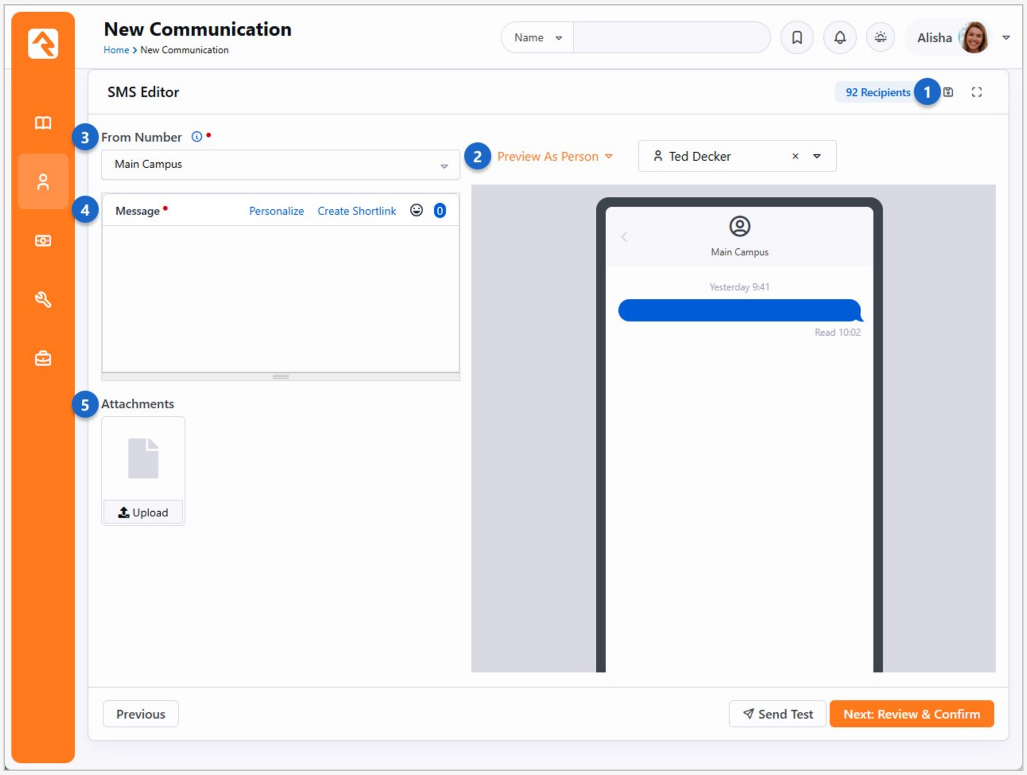
- How long the token is valid
- How many times it can be used
- Which page it should be used for

Check out our PersonTokenCreate Lava documentation for full details.

Depending on your Security Settings a tokenized link may not be able to be generated for all of your recipients. Out of the box, a person token can't be created for people with an Extreme level Account Protection Profile.

When everything is set up and looks the way you want, click `Next` to go to the *SMS Editor* screen. If your communication will be sent by email only, the wizard will skip this screen. The *SMS Editor* is similar to the *Email Editor*. This is where you design how your SMS message will appear.

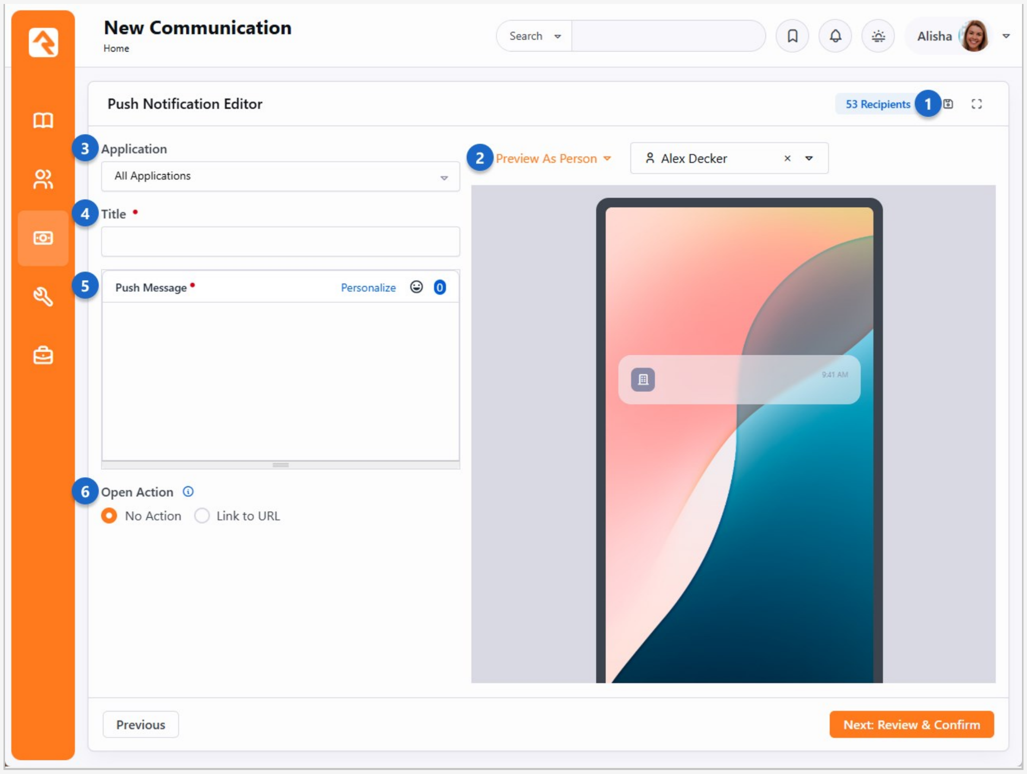
SMS Editor



1. **Save**
   Select the SMS phone number from which the text message will be sent. Unless specified in the block's settings, this list will contain all active SMS phone numbers you have configured.
2. **Preview As**
   - **Person:** Select a person to preview the message using their data.
   - **Segment:** Choose a personalization segment to preview with a sample person from that group. If the segment has no people, a warning appears. The previewed person's name shows in the Previewing As field but may not be an actual recipient.
3. **From Number**
   Personalization has never been easier. Use the list here to populate your message with the Lava you'll need to truly customize and personalize content for each recipient.
4. **Message**
   This area is where you'll compose the actual content of your message. Personalize any message using lava, create a shortlink, add emojis or check your character count.
5. **Attachments**
   Upload files that will be sent with the message as an attachment.

Click `Next` when you are ready to move on. If you're sending the communication via a Push Notification, then you'll see the *Push Notification Editor* screen instead of the Email and SMS screens described above.

Push Notification



1 **Save**
Click this to save a draft of your Push Notification.

2 **Preview As**

- **Person:** Select a person to preview the message using their data.
- **Segment:** Choose a personalization segment to preview with a sample person from that group. If the segment has no people, a warning appears. The previewed person's name shows in the Previewing As field but may not be an actual recipient.

3 **Application**
Select which mobile app to send this notification from, if you have multiple. For more on configuring applications, see the `Creating an App` section of our *Mobile Docs*.

4 **Title**
This will be the title of the push notification and will be seen by the person receiving it.

5 **Push Message**
This is the main content that the person will see. Personalize notifications with merge fields, add emojis and check your character count.

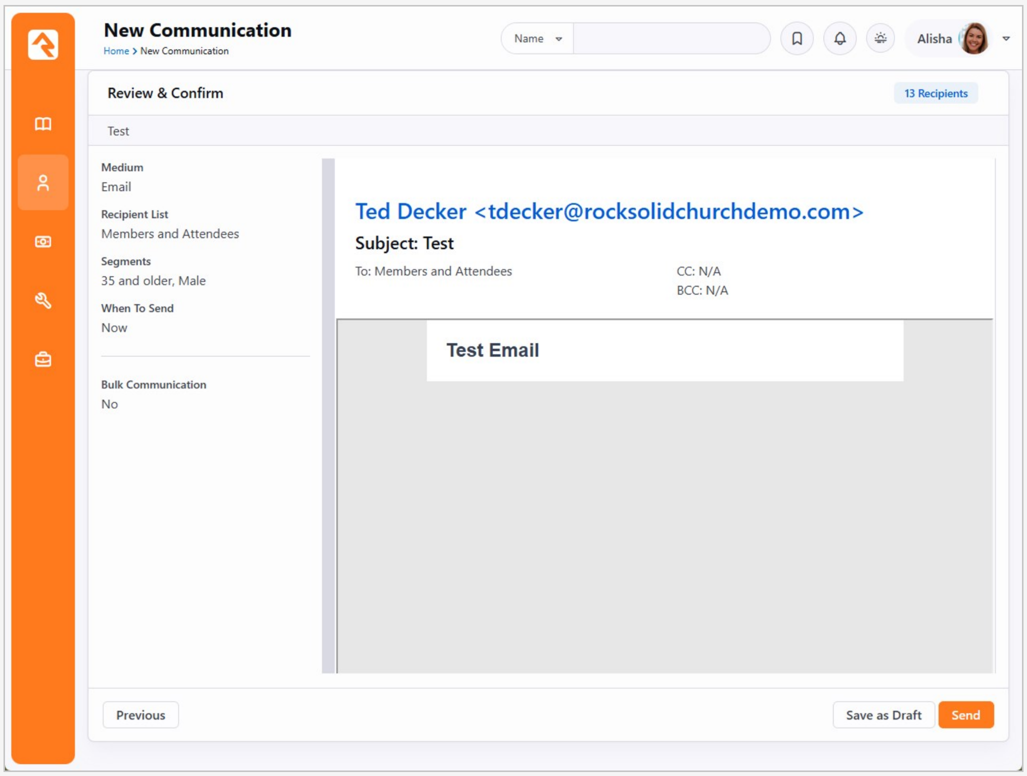
6 **Open Action**
When *Link to Mobile Page* is selected then you can set which page the person will be taken to, including any query string parameters you might add. These two features require Rock Mobile and require that Rock Mobile is configured correctly to receive these details.

SMS and Push Templates

Emails aren't the only medium that benefits from a template, SMS and Push Notifications can do it too. Go to `Settings > Communication > Communication Templates` and press to create a new template. Fill in the SMS or Push section with relevant details. Next time you send an SMS or Push Notification with your new template, you can skip a few steps.

With the last of the communication methods configured, click `Next` to go to the *Confirmation* screen. This is the last stage in the process before we actually send the communication.

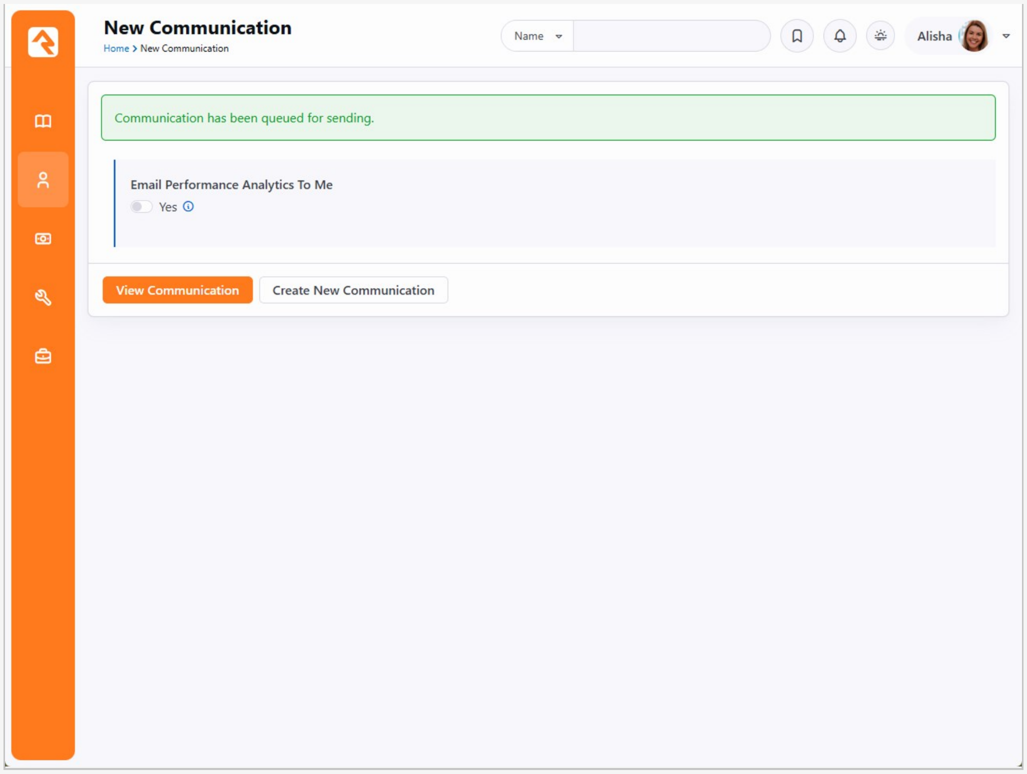
Confirmation



This screen will give a snapshot of your communication's final look, when it is getting sent, and who will see it.

After clicking `Send`, the communication is on its way to your faithful audience, but it doesn't stop there.

Communication Queue



1. **Email Performance Analytics To Me**
   If you want to see how your communication is performing.
2. **View Communication**
   If you want to immediately see the communication's analytics. See the Viewing Analytics section to learn more.
3. **Create New Communication**
   To reset and spend some more time with the Wizard.

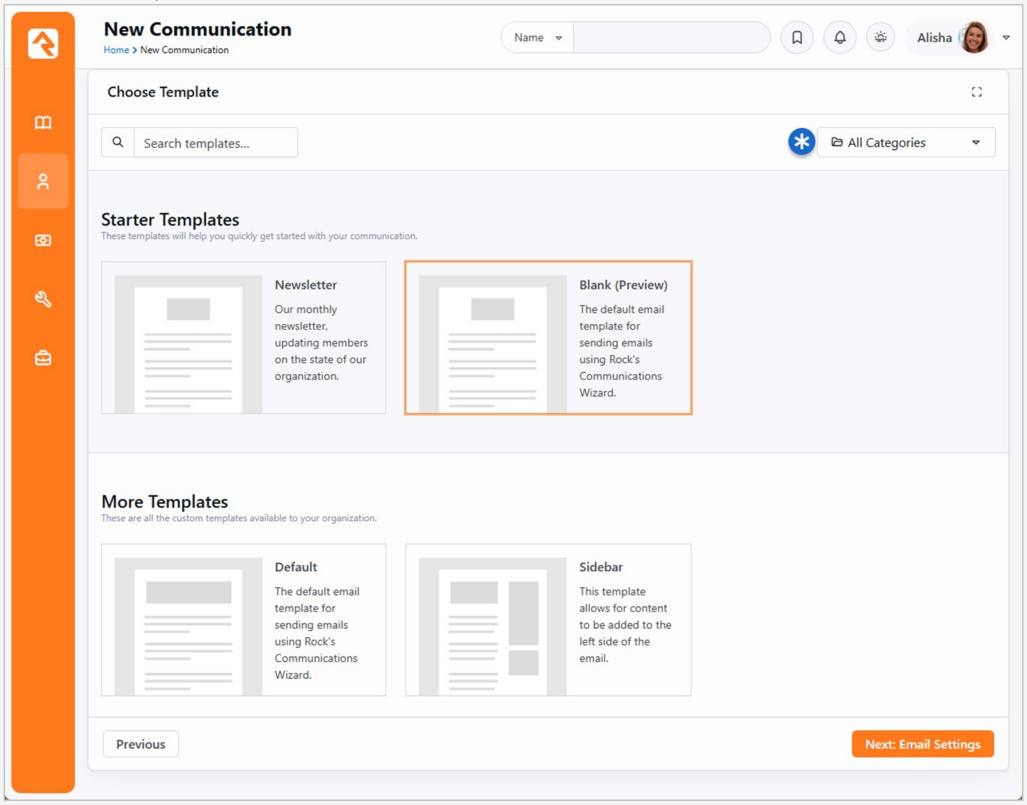
> **Re-send the Same Communication**
> Your time is valuable, you don't have to churn out duplicates of the same email. Instead, click the button from the Communication History page. This will take you back to the beginning of the *Communication Wizard*, keeping the settings and design options of the original communication.

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

Communication Templates

Communication Templates make it easy to send polished, on-brand messages every time. They help your team stay consistent and efficient—so you can focus on what really matters. Instead of rewriting the same message for the hundredth time, just use a template and give your fingers a break.

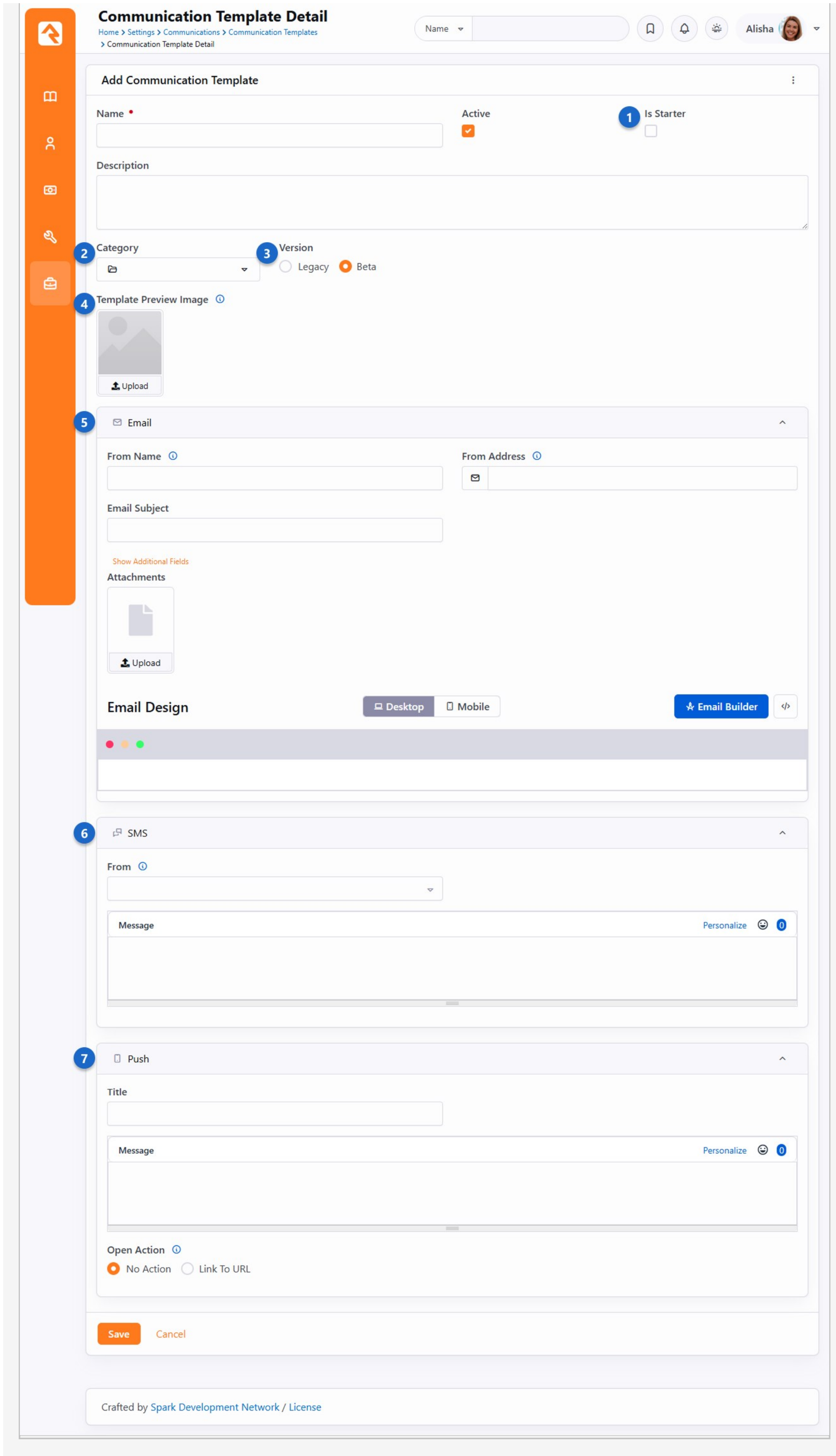
Choose Template



As you build your template collection, finding the right one can get tricky. That's where *categories* come in. By filtering templates by *Category*, you can zero in on exactly what you need.

To begin, go to `Admin Tools > Settings > Communication Templates`, then press the button to create a new template.

Communication Template Detail


Communication Template Detail
Home > Settings > Communications > Communication Templates > Communication Template Detail
Name
Alisha
Add Communication Template
Name
Active
1
Is Starter
Description
2
Category
3
Version
Legacy
Beta
4
Template Preview Image
Upload
5
Email
From Name
From Address
Email Subject
Show Additional Fields
Attachments
Upload
Email Design
Desktop
Mobile
Email Builder
6
SMS
From
Message
Personalize
0
7
Push
Title
Message
Personalize
0
Open Action
No Action
Link To URL
Save
Cancel
Crafted by Spark Development Network / License

1. **Is Starter**
Check Is Starter to pin your template to the top of the *Choose Template* page. Use this for the 20% of templates you rely on 80% of the time.

2. **Category**
Set a Category to group templates by theme or purpose for easier organization. More on this below.

3. **Version**
Select which block version you prefer:
    - **Legacy** only lets you code email templates in HTML. SMS and Push don't support emojis.
    - **Beta** includes the drag-and-drop email builder, emojis and more.

4. **Template Preview Image**
Select a thumbnail image to preview your template visually on the *Choose Template* page.

5. **Email**
Create reusable subjects and attachments. Then use the Email Builder to design polished emails quickly with drag-and-drop tools.

6. **SMS**
Structure your SMS message, add Lava or emojis and save it as a reusable template.

7. **Push**
Set up a Push Notification, add Lava or emojis and save it for future use.

Once you click `Save`, your template is ready for use.

Organizing and Securing Templates

Categories help you group templates by theme—like *General*, *Children's Ministry* or *Finance*—so it's easier to find what you need.

If certain templates are especially important, you can restrict access using security settings. From the *Communication Template List* page, click the icon to choose who can View, Edit or Administrate each template.

Keep in mind: you'll only see templates you have *Edit* permission for on your *My Settings* page.

> **Using the Communication Template Preview Image**
> When selecting a template from the Communication Wizard or *My Settings*, a preview image helps you quickly recognize the template's purpose. If you're using the Email Builder, Rock will automatically generate a screenshot—no need to upload one manually.

Simple Editor

Looking to reach out in a snap? With the Simple Editor, you're ready to create messages and get them out the door quickly and easily. Think of it as your shortcut to connecting with your audience—no fancy words or complicated settings to figure out. Just follow a few easy steps, and your message is on its way.

Let's dive in and explore the power of the Simple Editor. By the end of this chapter, you'll be a pro at using this tool to enhance your communication efforts.

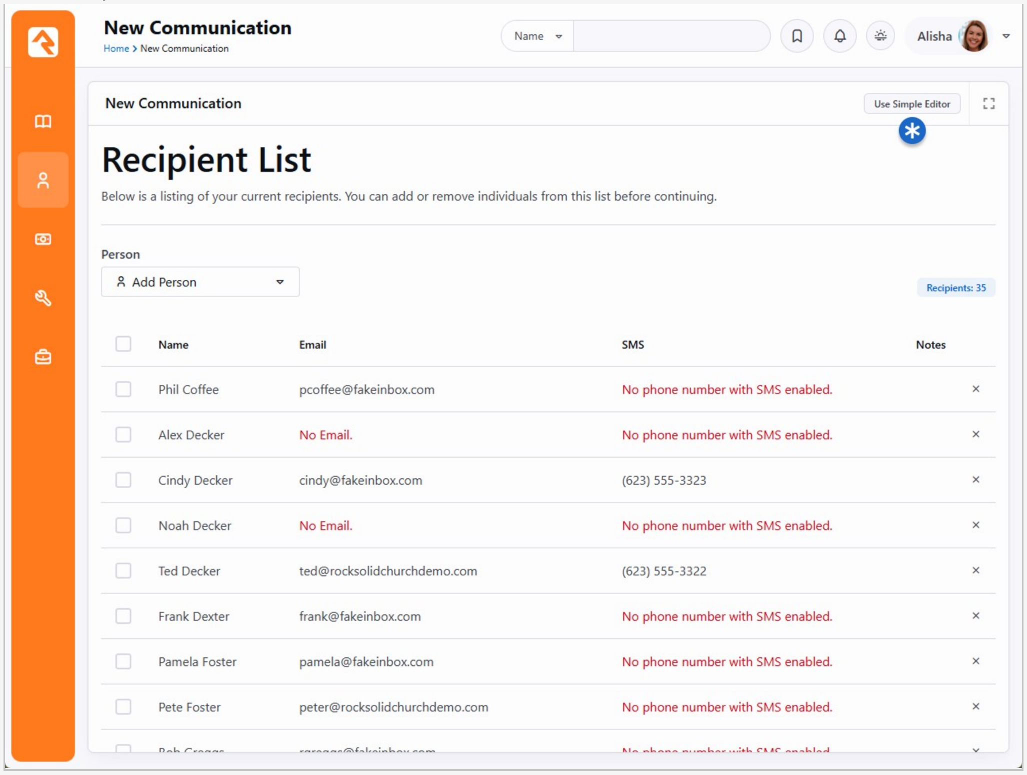
Sending a Communication Using the Simple Editor

There are many ways to start a new communication. Perhaps one of the most popular methods is to click the button at the top or bottom of any grid of people. This will take you to the *New Communications* page and add all the individuals from the grid to the communication as recipients. This is particularly powerful when the list of people comes from Data Views or groups. If you prefer, you can also start a new communication from `People > New Communication` and enter all recipients by hand.

> ### Hide the New Communications Button
> If a person does not have view access to the *New Communication* page the *Communicate* button at the bottom of grids will be hidden.

Whichever method you use, the Simple Editor can be accessed by clicking the `Use Simple Editor` button near the top right of the screen.

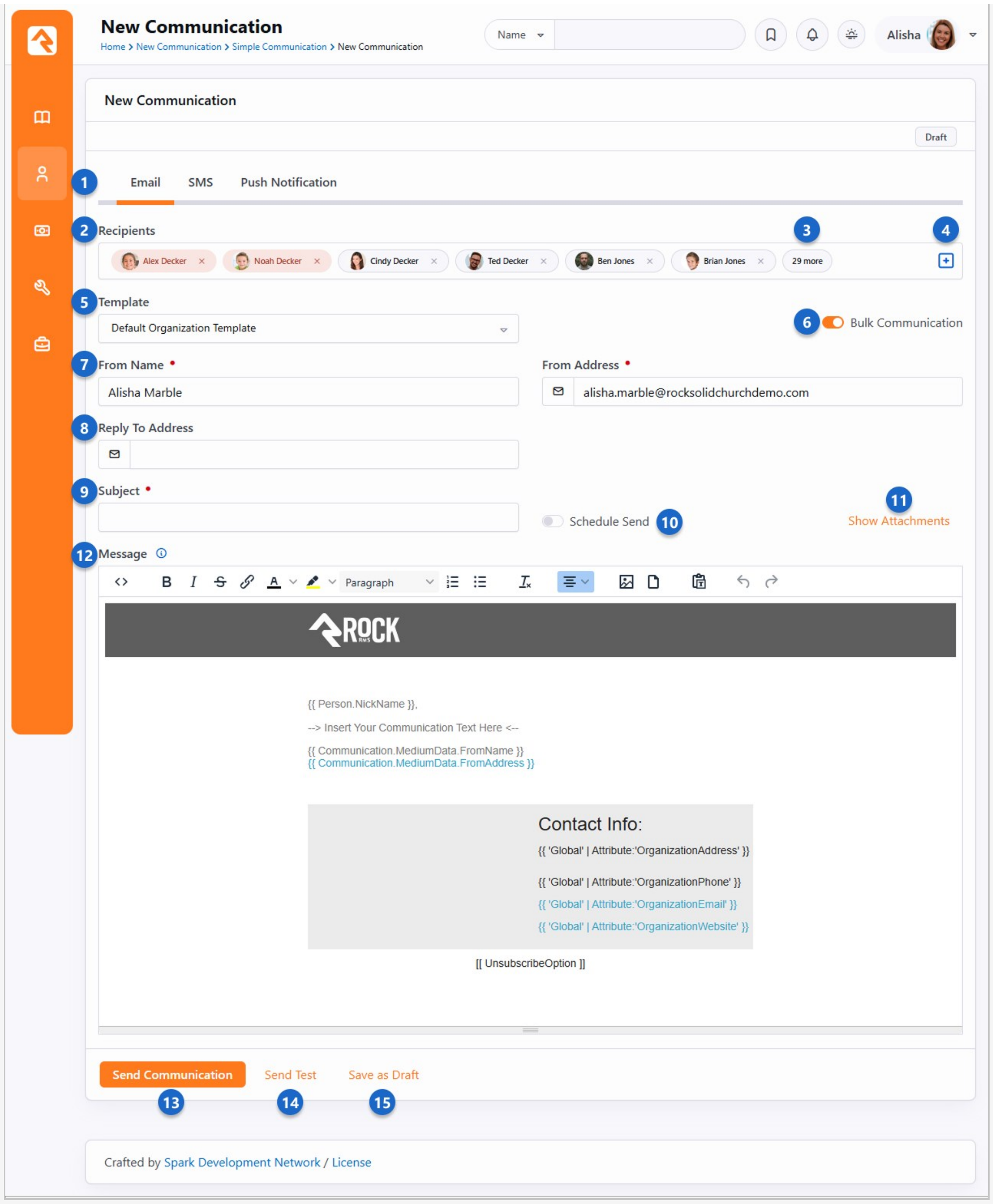
Use Simple Editor



Once on the *Simple Editor* 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.

> **But I just want to send a quick email...**
>
> You don't have to use all the features of the Simple Editor. All you need are recipients, the name and email address of the person sending it (automatically filled in for you), a subject line, and then your actual message.

New Communication



1 **Communication Medium**

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 the people you previously selected as recipients. Don’t forget that if you start with a blank communication, you'll need to enter all the names manually. Sometimes you may see some names in red. These names either do not have an email address or have been marked as not wanting emails or bulk emails.

3 **Additional Recipients**

Click this button to see a list of all your recipients. From there you can add additional people or remove people from the list. This button won't appear if all of your recipients fit on the screen.

4 **Add Recipient**

Click the button to add a new recipient to the list.

5 **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.

6 **Bulk Communication**
Determine if this message should be treated as a bulk email. Bulk emails will have an unsubscribe link added to them and will exclude people who have asked that they not receive bulk emails. If you can't see this option then the email is being treated as bulk.

7 **From**
Fill in the name and email address from which the email should be sent. By default, your contact information will be used, but you can change this as needed.

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

9 **Subject**
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 if enabled in the block's settings, so by all means be creative.

10 **Schedule Send**
If you'd like, you can delay sending your message until a date and time in the future. What a timesaver!

11 **Show Attachments**
If enabled in the block settings, you can add any number of attachments to the email. Why limit a good thing?

12 **Message**
Now the fun part: your message. While you can enter any generic message in this box, consider personalizing your message using Lava merge fields. Personalization is one of Rock's main strengths so be sure to use it to its fullest.

13 **Send Communication**
The moment of truth. Have you sent a test email? Is your recipient list accurate? Did you proofread the message? When everything's in place, you're ready to send your creation.

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

15 **Save as 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 `People >`

`Communication Reports > Communication History`. Take the time to get it right!

Prevent Duplicate Communications

To prevent duplicate messages when family members share an email or SMS number, go to the block settings for the *Communication Entry* block and set *Show Duplicate Prevention Option* to “Yes”. This adds a checkbox to the block that, when selected, ensures only one message is sent per shared email or phone number. The message will still be personalized—so if spouses share an email, only one will receive it, addressed to them.

Resolving Relative Links

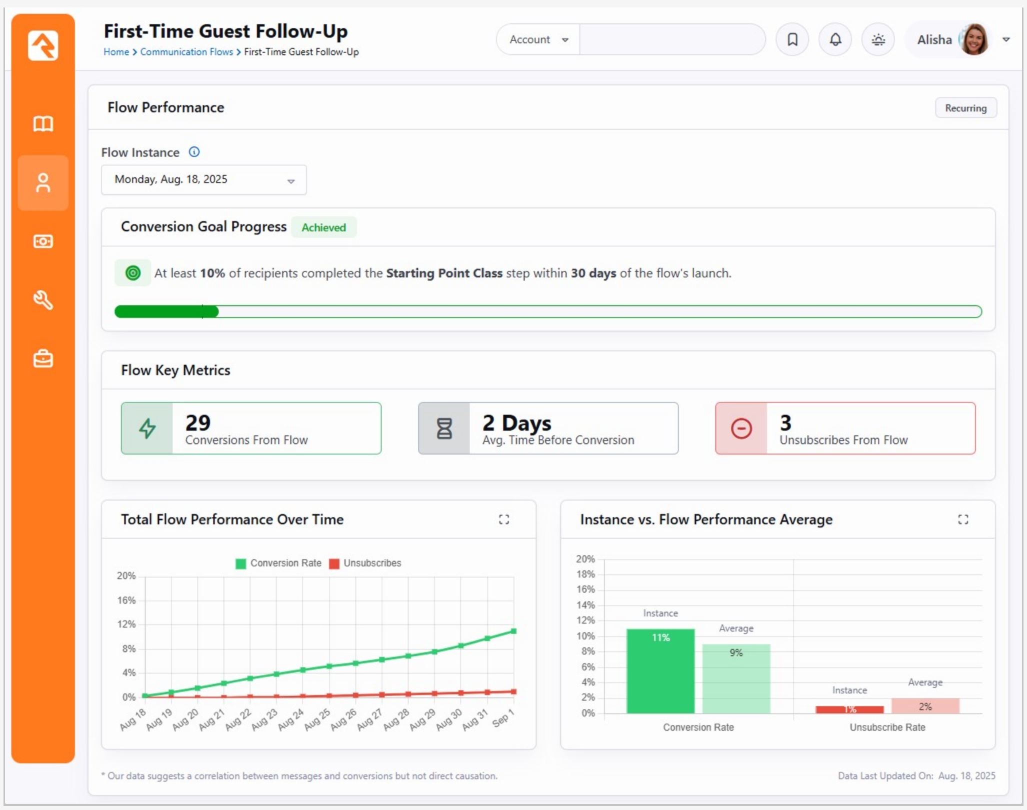
By default, Rock will convert relative URLs in links and images to absolute URLs using the *Public Application Root* global attribute.

Communication Flows

Communication Flows turn scattered messages into smart, strategic nudges that move people to action. Whether you're announcing a new event or rallying a ministry team, Flows help you send the right message at the right moment, with a clear goal in mind.

No more guessing what's working. With built-in tracking, you'll see exactly who's engaging, what actions they're taking and how close you are to hitting your target. Imagine hearing, "We want 25% of new attendees in our Intro Class by December," and knowing you can measure every step of the journey with Flows.

Flow Performance Overview



You're not just sending messages. You're building momentum like a river gathering strength as it flows.

What is a Flow?

A *Flow* is a sequence of Rock-powered communications — *Email*, *SMS* or *Push* notifications — designed to guide people toward a specific goal. You can schedule messages over time, target exactly who should receive them and remove individuals once they've completed the journey.

What is a Conversion Goal?

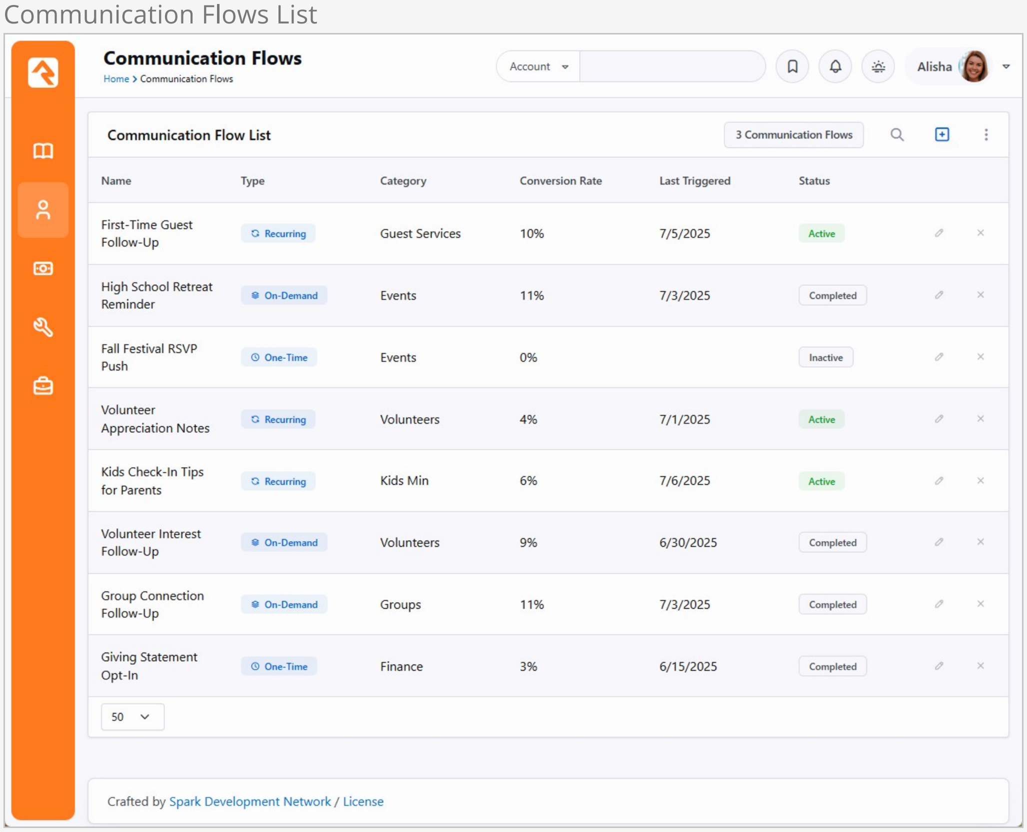
A *Goal* defines success for your Flows. It's based on actions like filling out a form, joining a group, registering for an event or appearing in a data view. With *Conversion Tracking* enabled, you'll know if your messages are doing what they set out to do.

Flow Types

- *Recurring*: Sends to a selected audience on a defined recurring schedule (daily, weekly, monthly).
- *On-Demand*: Assigns individuals to a flow instance as needed through workflows or other events, such as the *Activate Communication Flow* workflow action.
- *One-Time*: A single message or series of messages scheduled for a specific date with no repeats (e.g., a stream of Christmas communications).

> **Flows Without Conversion Goals:**
> You can still use Flows to package related communications even if you don't need to track specific outcomes. This works well when conversions aren't essential to your process.

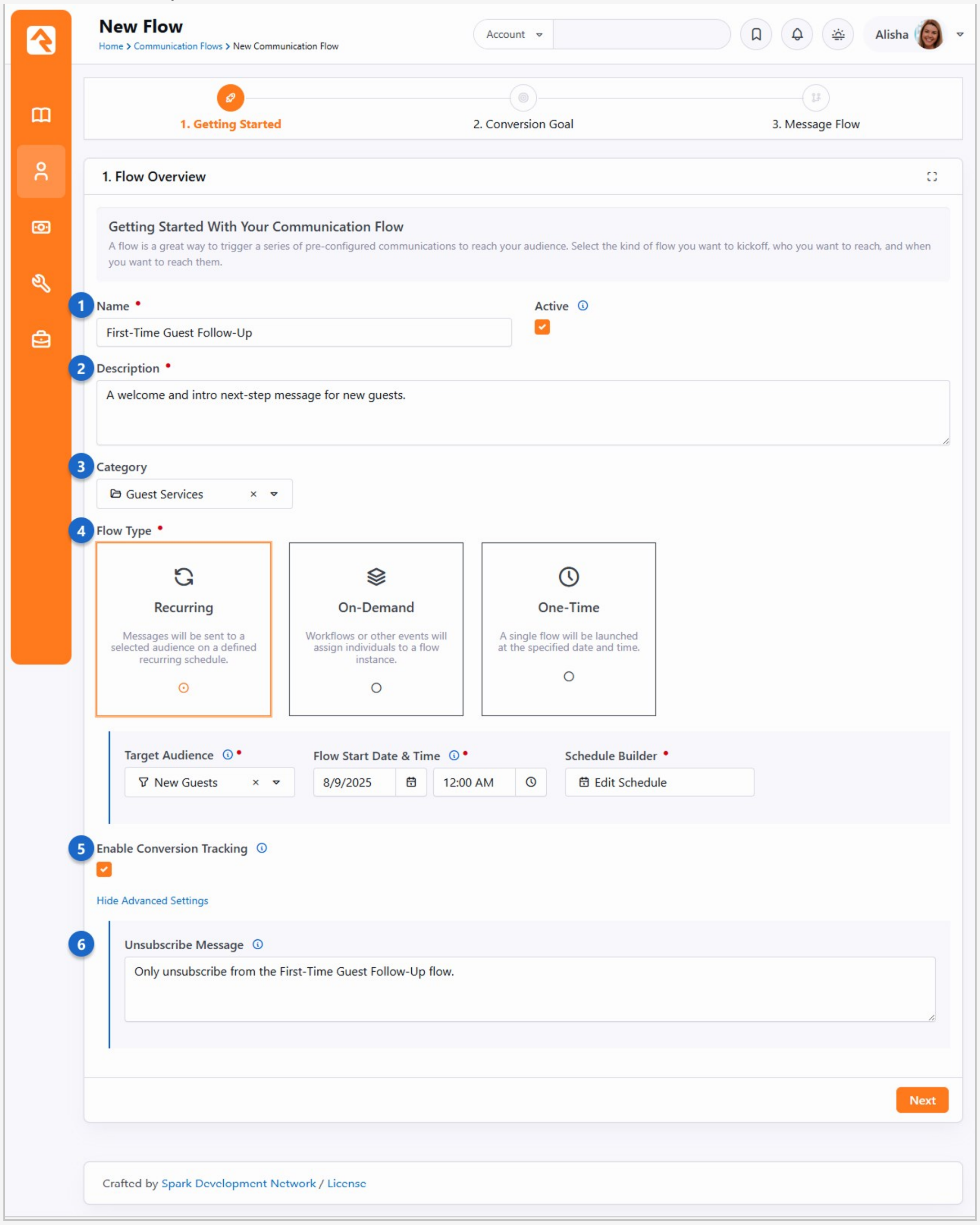
Communication Flows List



Create a Flow

To create a Flow, navigate to `People > Communication Flows` and press the **+** button in the top right.

New Flow Setup



1 **Name**
Enter a name for your flow. Pick something clear so you can recognize it later.

2 **Description**
Add a short explanation of what this flow is for. This helps others understand its purpose at a glance.

3 **Category**

Choose the category that best fits your flow (like Discipleship, Baptism or Guest Services). Categories keep flows organized. Categories are defined in `Admin Tools > Settings > Category Manager` as any Category added under the Entity Type: *Communication Flow*.

4. **Flow Type**
   Select how your flow should run:
   - *Recurring* – Messages are sent on a defined schedule to a target audience. You'll need to pick a Data View and set a recurring schedule in the schedule builder (more on this below).
   - *On-Demand* – Assigns individuals to a flow instance as needed through workflows or other events, such as the *Activate Communication Flow* workflow action. No audience or schedule setup is required.
   - *One-Time* – A single flow that runs at the date and time you choose. No schedule builder is needed.

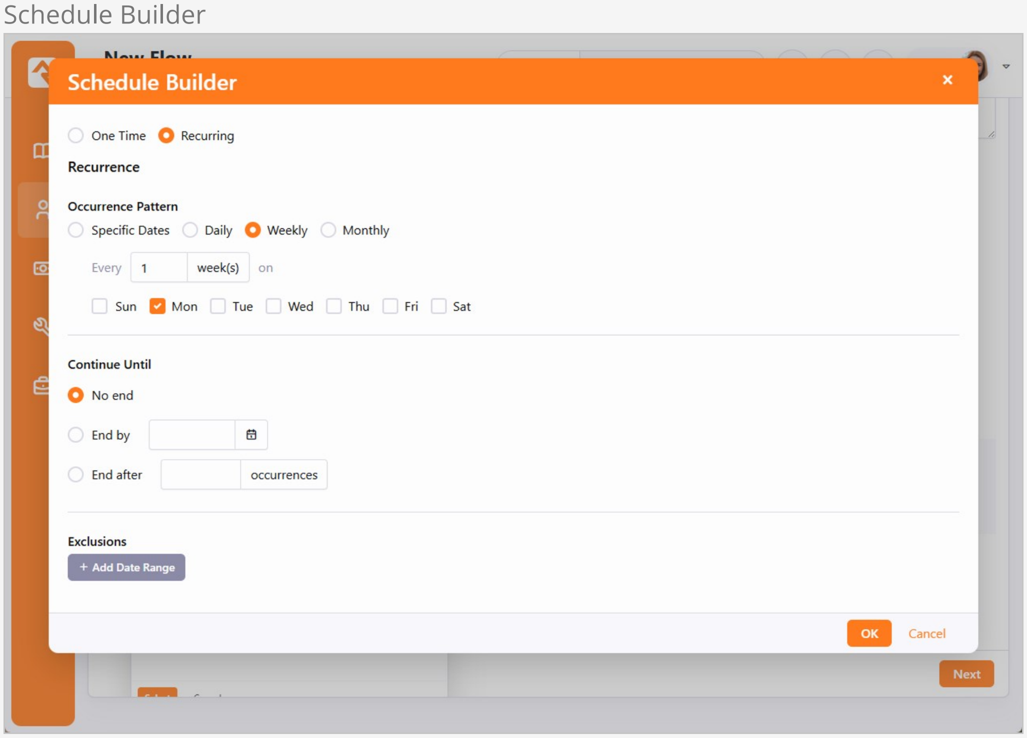
5. **Enable Conversion Tracking**
   Enable this if you want to track goals for your Flow, more on this below.

6. **Unsubscribe Message**
   Customize the message recipients see if they unsubscribe from this Flow through email.

For *Recurring* flow types, you'll need to set up a recurring schedule (that makes sense, right?).

Click the `Edit Schedule` button, and you will see the pop-up below.

Schedule Builder



Here you can:

- Set an *Occurrence Pattern* (specific dates, daily, weekly, or monthly).
- Decide how long the flow should continue (no end, end by a certain date, or after a number of occurrences).
- Add exclusions if needed by choosing specific date ranges to skip.

This makes it easy to create a rhythm for your messages, whether that is weekly follow-ups, monthly reminders or a custom pattern.

> **Best Practices for Recurring Flows:**
> Recurring flows are powerful because each scheduled send counts as a new instance. This means results are tracked per occurrence, giving you a clear view of how each cycle performs.
>
> Be mindful when scheduling frequent messages. If recipients have already completed your *Conversion Goal* or engaged with your communications, they may receive messages they no longer need. Too many unnecessary messages could increase the chance they click `Unsubscribe`. Always make sure your schedule aligns with your purpose and your audience's needs.
>
> Most importantly, your *Data Views* should be solid, targeting the right audience, those people who will benefit from your communications.

When your schedule is ready, select `OK` in the Schedule Builder.

To create a Goal, click `Next`.

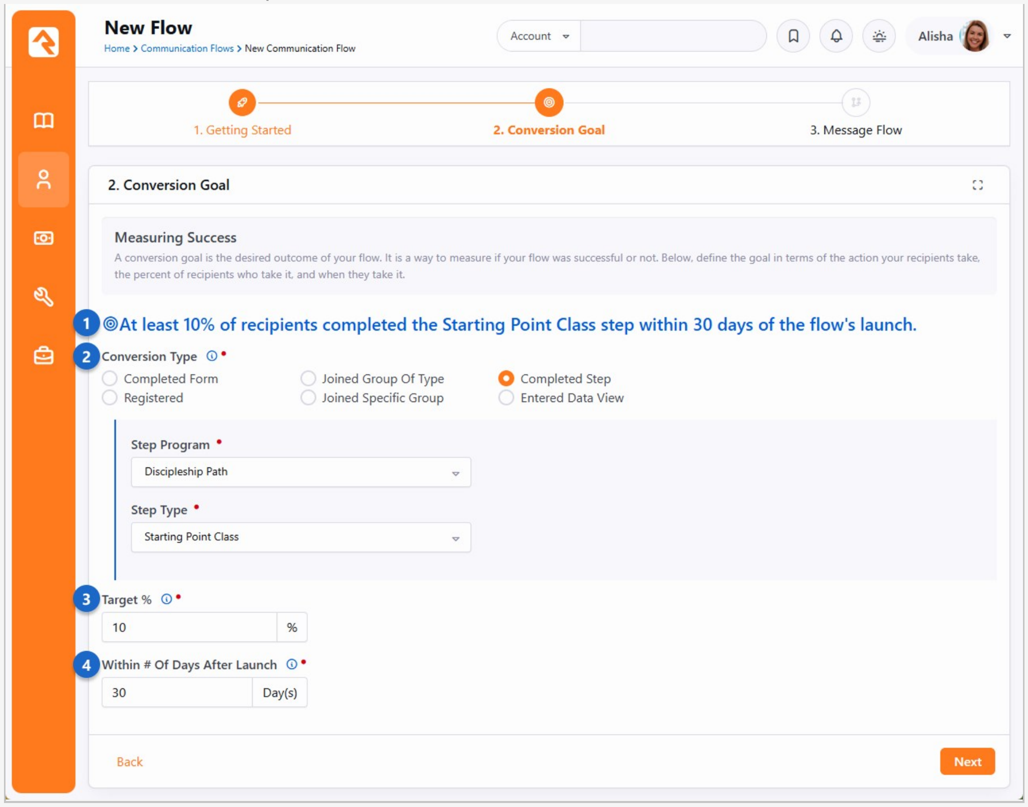
Set a Goal

> "If you did not enable goal tracking during flows creation, you can skip this section."

Conversion Goals

Conversion goals measure whether your flow is accomplishing its purpose. Think of them as success markers tied to real actions recipients take.

Conversion Goal Setup



1. **Goal Display**
   The statement of your goal (for example, “10% of recipients complete Kids Registration”).
2. **Conversion Types**
   Choose what counts as success:
   - *Completed Form* – Tracks when a recipient completes a specific form or workflow.
   - *Joined Group of Type* – Tracks when a recipient joins any group within a designated group type (like a Small Group or Serving Team).
   - *Completed Step* – Tracks when a recipient finishes a specific Step, such as a Discipleship Step.
   - *Registered* – Tracks when a recipient registers using a specific Registration Template.
   - *Joined Specific Group* – Tracks when a recipient joins a specific group, not just a type.
   - *Entered Data View* – Tracks when a recipient appears in a defined Data View, useful for reporting-based goals.
3. **Target %**
   The percentage of people you expect to complete the goal for it to count as a win.
4. **Goal Time Window**
   The number of days after launch recipients have to complete the goal.

Each Conversion Type connects directly to a Rock feature. For example, you might set a goal for 10% of recipients to complete the Starting Point class within 30 days.

Note that the flow will only count recipients who have not already completed that goal.

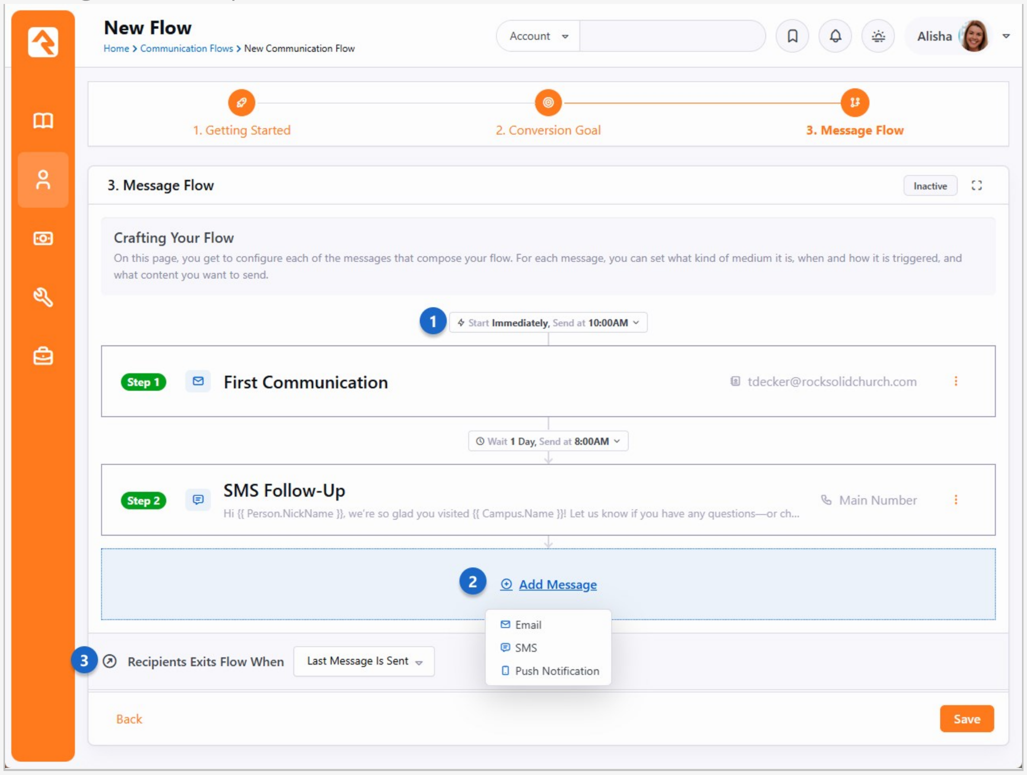
> **People, Not Activity**
> Conversion goals are always about people, not actions. One person can only complete a goal once. For example, if someone fills out the same pledge form multiple times, only one conversion is counted. While flows can help meet organizational goals, the real aim is serving people, not checking boxes.

Select `Next` when you're ready to continue with message creation.

Set Message Flow

In this step you'll design the sequence of communications that make up your flow. For each message you can decide what kind it is, when it is sent, and what content it includes.

Message Flow Setup



1 **Message Buffer**
Establish a wait time (number of days) and a send time (e.g., 10:00 AM). Each individual message can have a different buffer, creating a flow of communication that engages the recipient without overwhelming them.

2 **Add Message Options**
Choose the type of communication to send:

- Email
- SMS
- Push Notification (recipient must have a Rock Mobile app)

3 **Recipient Exits Flow When**
Decide when a recipient should stop receiving messages in the flow:

- Last Message Is Sent (default)
- Any Email Opened
- Any Email Clicked
- Conversion Is Achieved

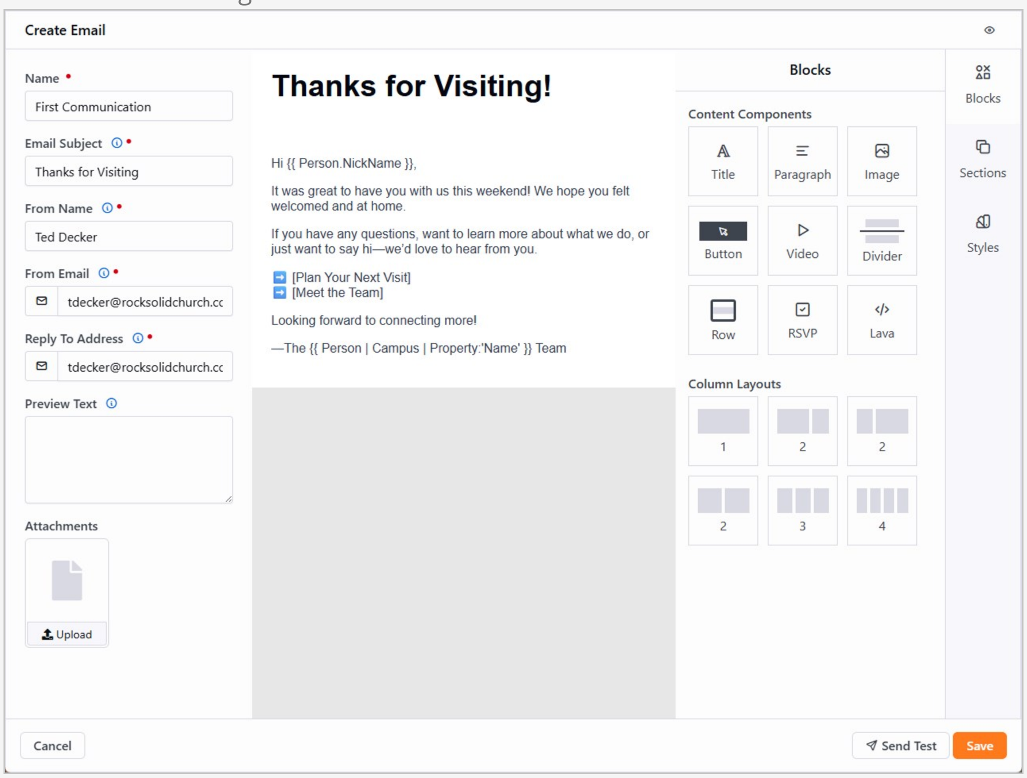
Best Practices for Message Flow

Think carefully about when someone should exit a flow. If a recipient has already engaged with your content or completed the goal, continuing to send them messages may feel unnecessary. In many cases, you simply want them to see your main point, not to receive a string of extra communications.

Exiting on conversion can also be helpful. For example, if a recipient registers for your event after the first email, they don't need further reminders. Use this option wisely to avoid over-messaging and to ensure every communication adds value.

Create Email

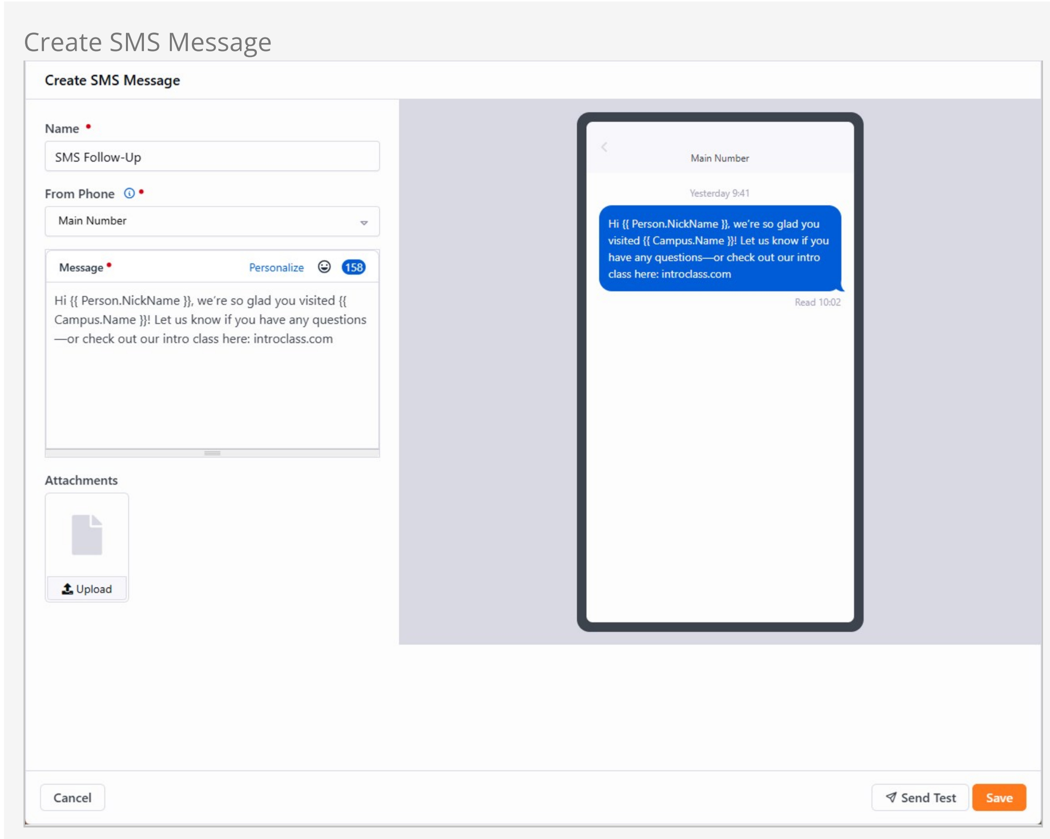
Create Email Message



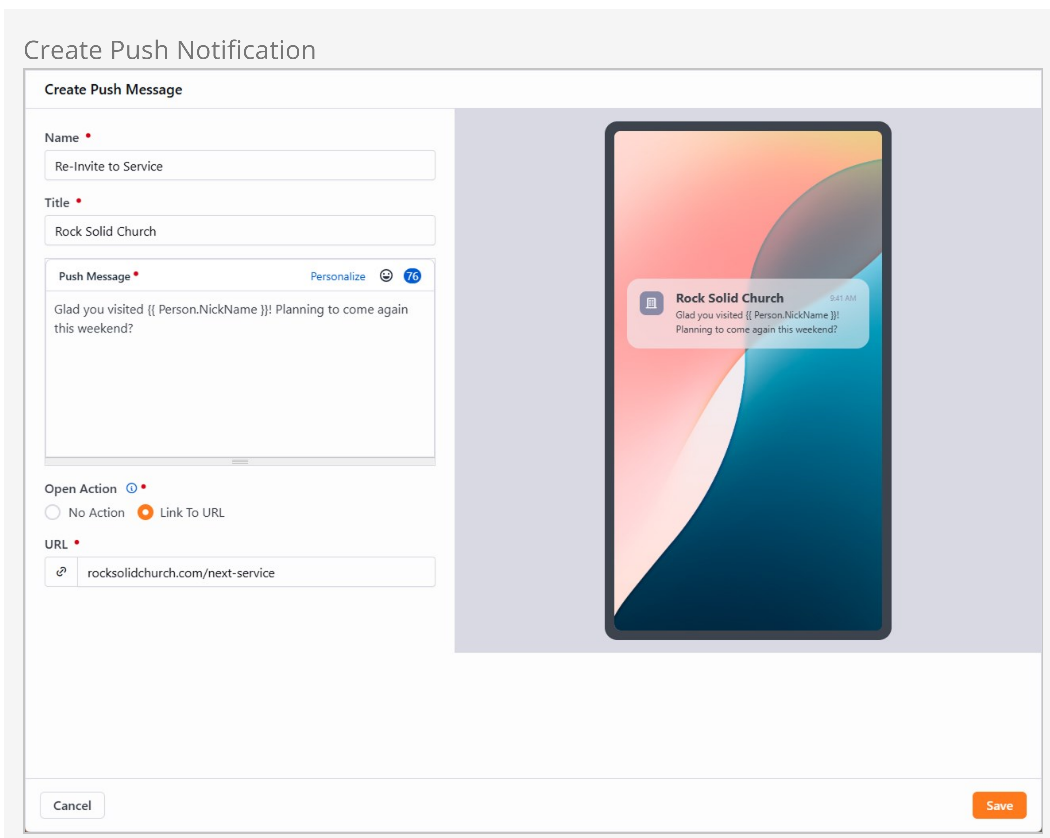
Communication Flow Templates

Email templates inside *Communication Flows* differ from system-wide *Communication Templates*. When you save a Communication Flow with an email, Rock saves that email as a template for future Flow use.
Only Communication Flows templates appear in the dropdown under *Styles* in the Email Builder.

Create SMS Message



Create Push Notification

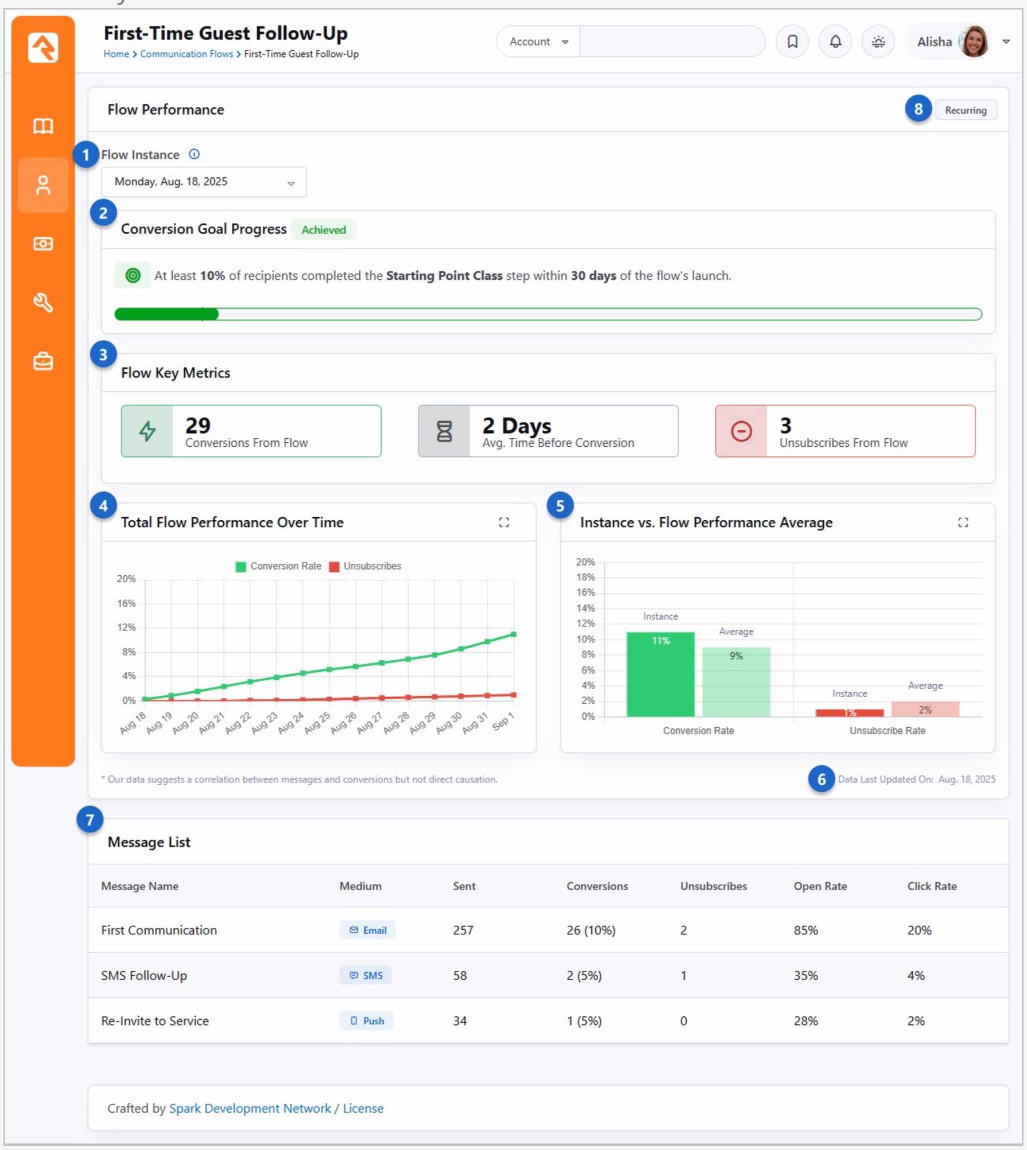


When you’re satisfied with your flow, click `Save`.

Flow Analytics

Select an active communication flow to view analytics. Flow analytics show how well your messages are performing, and what is driving conversions (if they're enabled). The details you see depend on the *Trigger Type* you selected.

Flow Analytics Overview



1 **Flow Instance**
Choose which instance of the flow you want to review.

- **Recurring** – Select an instance by date on the recurring schedule.
- **On-Demand** – Select a date range since messages are sent on-demand.
- **One-Time** – There is only one instance, so no comparison chart is available.

2 **Conversion Goal Progress**
Four progress markers indicate how close you are to meeting the goal, if

applicable:

- **Not Tracked** – No conversion goal is set.
- **Pending** – Goal is not achieved, but not past the time window.
- **Achieved** – Goal was met within the defined window.
- **Missed** – Goal was not met in the time window.

3 **Flow Key Metrics**
Quick stats on conversions, average time before conversion, and unsubscribes.

4 **Total Flow Performance Over Time**
Shows conversion and unsubscribe trends. Hover to see daily conversion rates.

5 **Instance vs. Flow Performance Average**
Compare how the current flow instance is performing against overall averages. One-Time flows will not show this comparison.

6 **Data Last Updated**
Metrics are updated by the *Process Communication Flows* job.

7 **Message List**
Click a message to drill into its specific metrics.

8 **Flow Trigger Label**
Displays the trigger type for this flow.

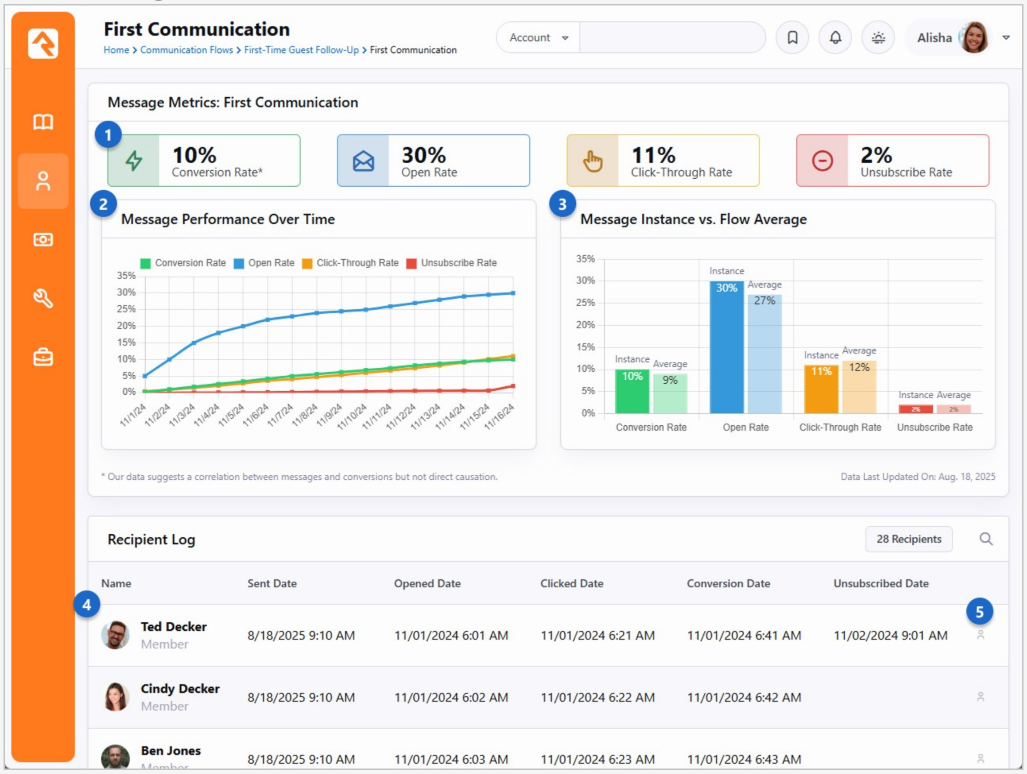
> These charts suggest correlation between messages and conversions, not direct causation.

Individual Message Metrics

When you select a message from the list, you'll see detailed analytics. Available metrics vary by message type.

Metrics for Email Messages

Email Message Metrics



1. **KPI Cards**
   Show message performance at a glance, including conversion rate, open rate, click-through rate, and unsubscribe rate. (Open rate not available for Push Notifications. Click-through and unsubscribe rates not available for SMS or Push Notifications.)
2. **Performance Over Time**
   Displays how each metric changes by date, giving you a clear picture of trends. Available for all message types.
3. **Message Instance vs. Flow Average**
   Compares the selected message's results with overall flow averages. Not available for One-Time messages.
4. **Recipient Log**
   Lists details for each recipient, including send date, open date, click activity, conversion, and unsubscribe information, with links to recipient profiles. (Open, click, and unsubscribe details are not available for SMS or Push Notifications.)
5. **Recipient Profile**
   Upon click, you will be redirected to the Recipient's Person Profile.

Unsubscribing From a Flow

If a recipient clicks `Unsubscribe` in an email, this is the page they'll see. The message displayed depends on the unsubscribe message you set earlier in the flow setup (*Unsubscribe Message*).

This helps people manage their preferences without unsubscribing from all church communication. Coaching tip: Be intentional when setting your unsubscribe message so recipients know exactly what they're opting out of.

> ### Unsubscribing from a Flow
> When someone clicks `Unsubscribe` from a flow, they're removed from future messages in that flow. See the Communication Preferences chapter for full details on unsubscribing.

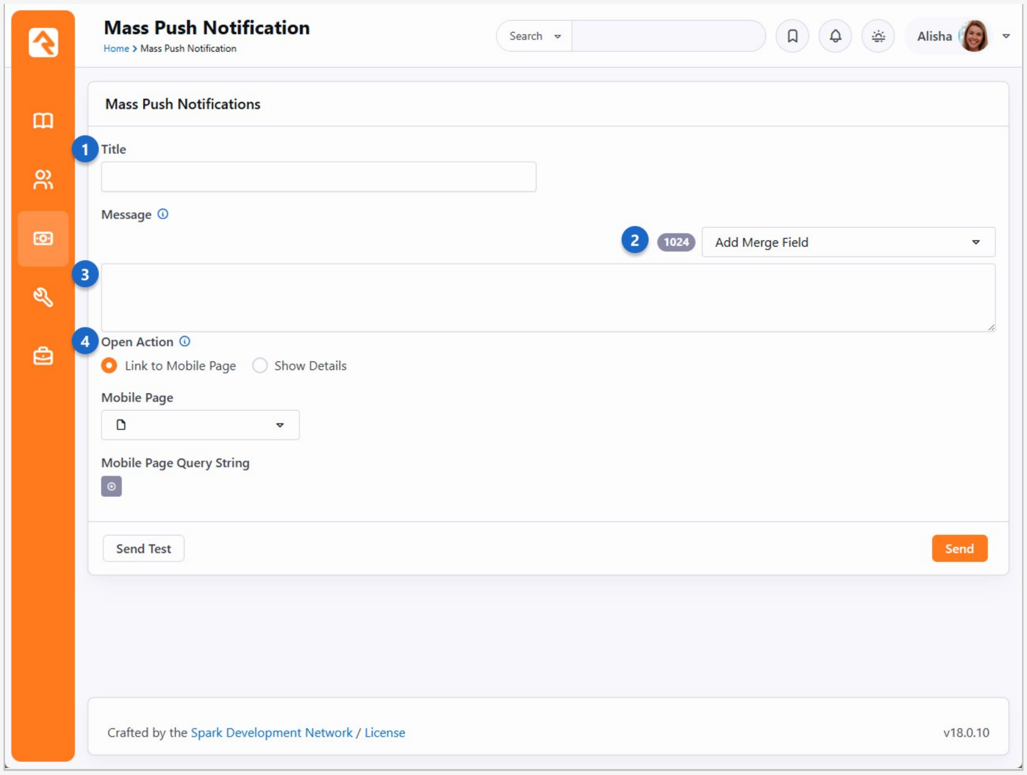
Mass Push Notifications

The *Mass Push Notification* page lets you send a push notification to every active mobile device in your system. By default, a device is considered active if it's had an interaction recorded within the past year. That's a lot of notifications, so this isn't something you'll use every day, but you'll find it's perfect for certain communications.

Sending Mass Push Notifications

You'll find the *Mass Push Notification* page under `People > Communications > Mass Push Notification`. If you've used tools like the Communication Wizard to send push notifications, then this page will look familiar to you.

Mass Push Notification



1. **Title**
   This will be the title of the push notification and will be seen by the person receiving it.

2. **Add Merge Field**
   You can easily personalize the content of the notification by adding Lava merge fields from this drop-down.

3. **Notification Content**
   This is the main content that the person will see. Merge fields will appear here when added, to customize and personalize the content.

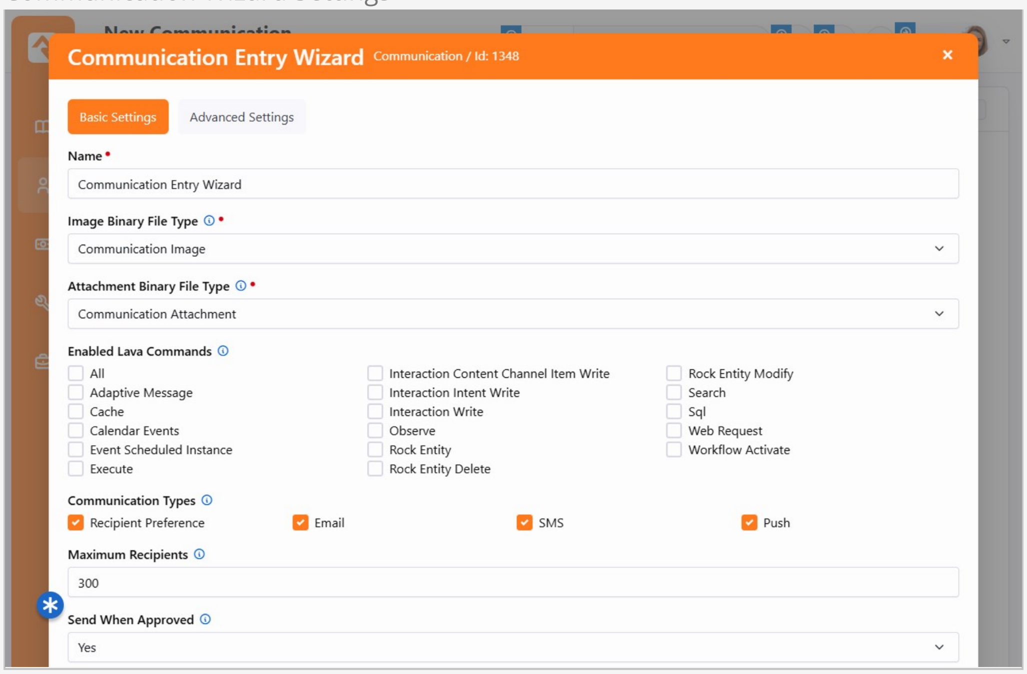
4. **Open Action**
   When *Link to Mobile Page* is selected then you can set which page the person will be taken to, including any query string parameters you might add. If *Show Details* is selected, you'll be prompted to select a Mobile Application and add additional details in the editor provided.

By default, this block will send a notification to every device that has had an interaction recorded in your system within the past year. Administrators can edit the block settings to change the number of days that the device must have had an interaction for it to be considered active.

Approvals

By default, emails that are sent to 300 or more recipients require approval. You can change this limit in the block settings for either the *Communication Entry* block (simple editor) or the *Communication Entry Wizard* block (wizard editor).

Communication Wizard Settings



Within these block settings, you will find two key options that control how approvals and sending behave:

Maximum Recipients

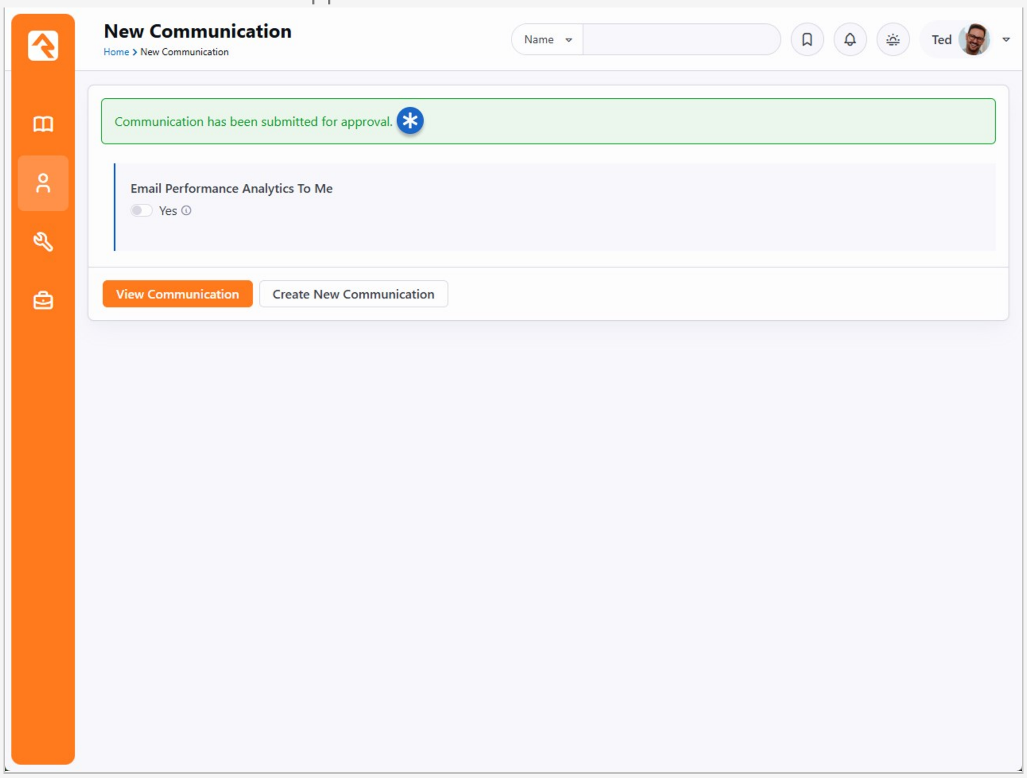
- Defines the number of recipients allowed before a communication requires approval.
- The default is 300, but you can adjust this number to fit your organization's needs.

Send When Approved

- Determines what happens after a communication has been approved.
- If enabled, the communication is sent immediately once it is approved.
- If disabled, Rock defers sending the message until the next run of the *Send Communications* job.

When someone without approval rights creates a communication, the message is always held for approval before it can be sent.
Here is an example.

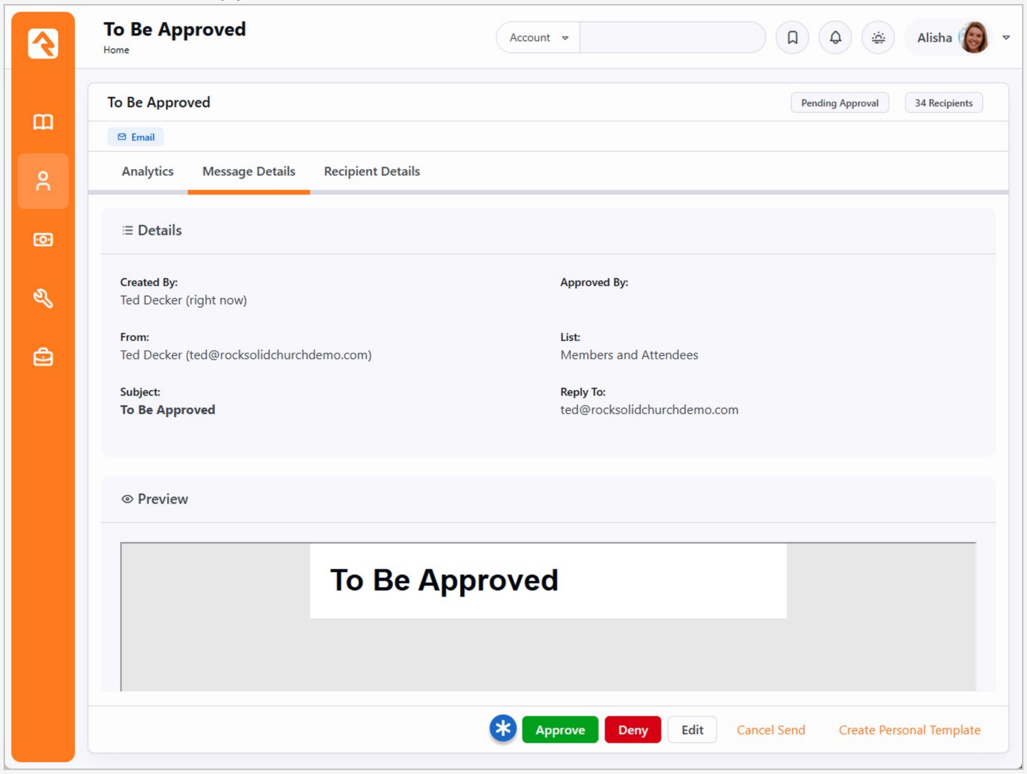
Communication Wizard Approval Submission



At this point, the message is not sent, but it's ready for approval.
When a message requires approval, its 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 receives the approval emails.

A communication will not be sent until it's approved by 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 all communications waiting for approval from the Communication History page. Approvers can find these messages by navigating to `People > Communication Reports > Communication History`, then filtering by status to select *Pending Approval* and review unsent messages.

Communication Approval



If *Send When Approved* is enabled and the message is scheduled for now, selecting `Approve` sends the communication right away. If not, the communication will be sent next time the "Send Communications" job runs. Selecting `Deny` returns the communication to the sender, who can make changes in the Communication Wizard and resubmit it for approval.

Additional security roles can be added to approve communications by adjusting the block security of the *Communication Entry Wizard* and *Communication Entry* blocks. Simply add the new role to the *Approve* permission of these blocks.

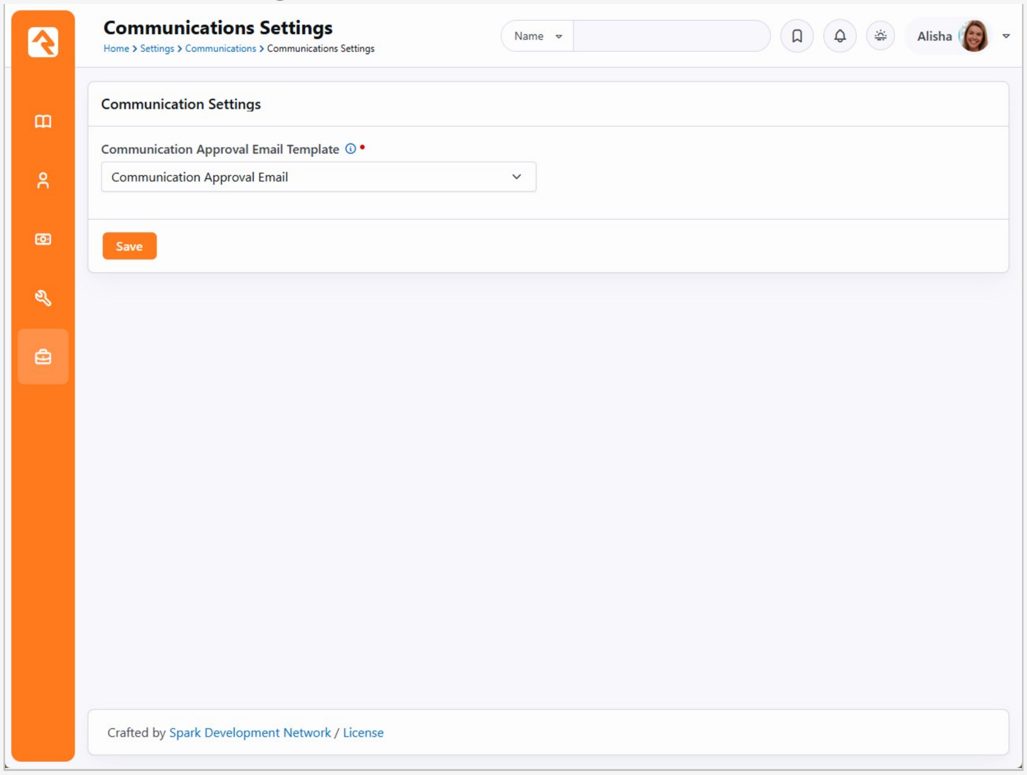
Approver Notification Emails

By default, the System Communication for approval emails is *Communication Approval Email*. Just like other communications, you can customize the content of your approval notifications to suit your needs.

> **Email Only**
>
> The approval notification communication currently only works with emails and cannot be used with the *SMS* or *Push* features.

If you need to take it a step further, you can use an entirely different System Communication for these approvals. Simply go to `Admin Tools > Settings > Communication Settings` and select the System Communication you want to use instead.

Communication Settings



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.

Setting Subscription Preferences

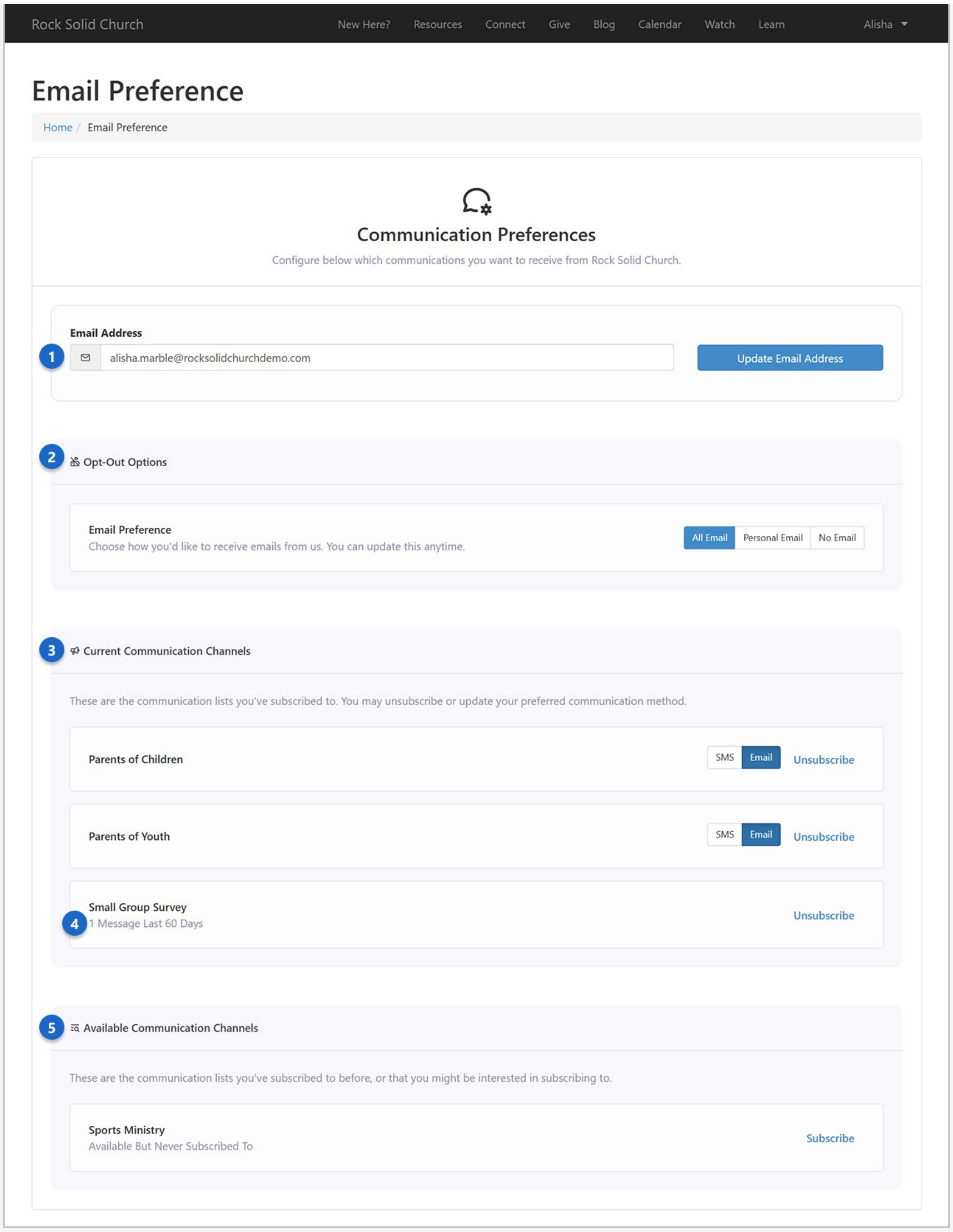
When someone is taken to the *Unsubscribe* page on the external site, they'll see the Unsubscribe page, pictured below. Upon arriving at the page, they can proceed to set their email preference.

There are two different modes:

- **Communication Preferences Mode** - Often a static page on your site, allowing communication recipients to change their preferences.
- **Unsubscribe Mode** - Navigated to using a link, generally from an email. Check out the tips to get it perfect.

Communication Preferences Mode

Communication Preferences Mode



1 **Email Address**
Shows current Email Address. You can enter a new address then select `Update Email Address`.

2 **Global Opt-Out Options**

1. *All Email* - Receive all emails, including personal emails and mass emails.
2. *Personal Email* - When clicked, this person is removed from all *Communication Lists* or *Campaigns*, but may receive individual emails. This will mark the person's “Email Preference” to “No Mass Emails” on their profile.
3. *No Email* - No emails will be sent to this email.

3 **Current Communication Channels**
Lists a person’s currently subscribed *Communication Lists*, and any

Communication Flows they have been added to. Communication Lists show their *Medium Preference* if enabled. Select `Unsubscribe` to leave a list.

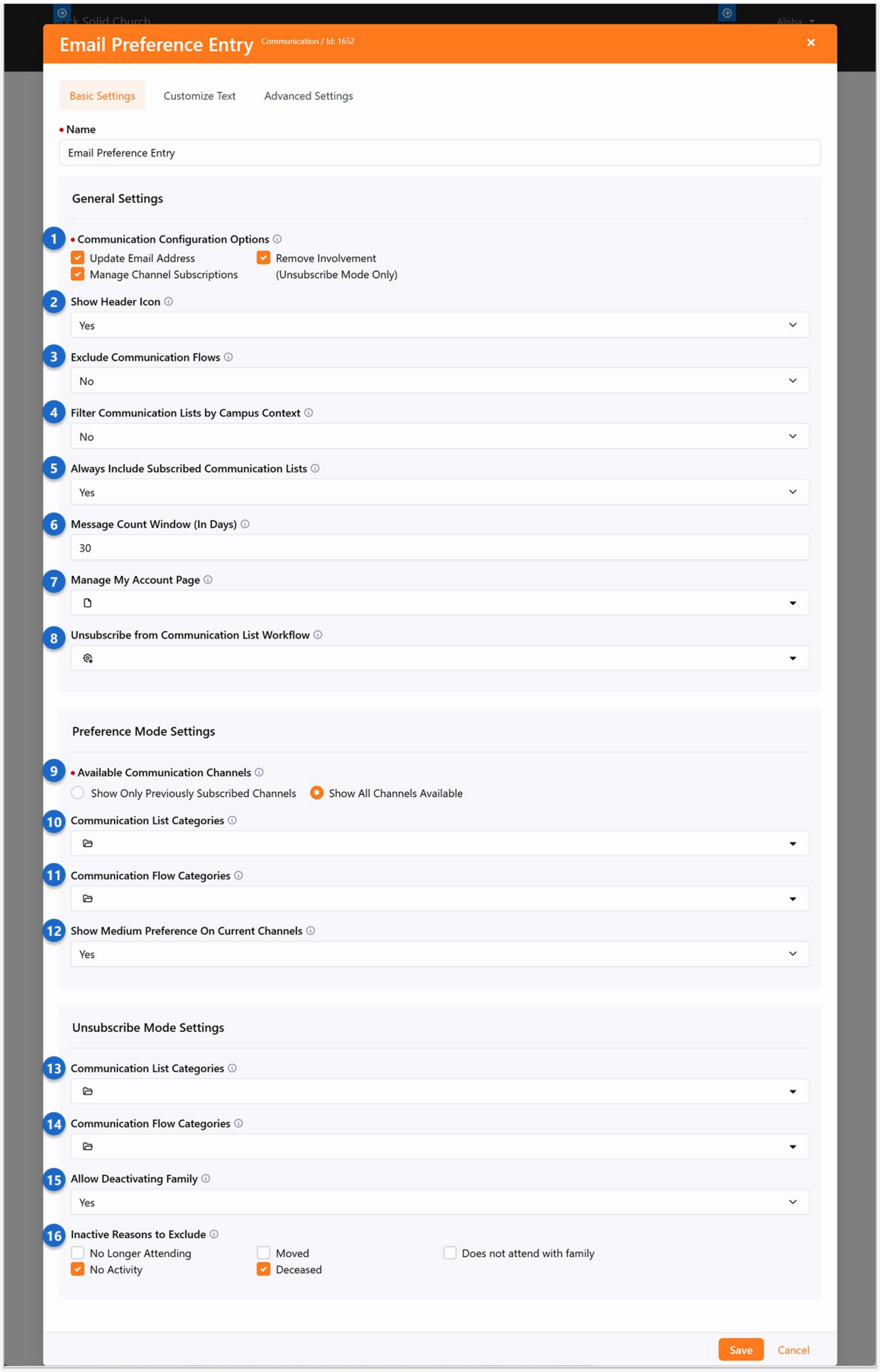
4 **Message Count**
Shows how many messages were sent for each *Communication Flow* or *List*. **You can configure the time window in the settings.*

5 **Available Communication Channels**
`Subscribe` to opt in. *Communication Lists* a person can join. People can select `Subscribe` to join a new list.

All changes to Email Preferences are logged in the *Person History* section of the *Person Profile*.

For more control over what actions can be taken from the *Email Preference Entry* block, head to the block settings.

Basic Settings Tab



1 **Communication Configuration Options**

Select which actions the page offers:

1. *Update Email Address* - Recipients can change their profile's email address.
2. *Manage Channel Subscriptions* - Offer recipients an opportunity to opt out or into different channels.

3. *Remove Involvement* (Unsubscribe Mode only) - Recipients can remove themselves from all communications and deactivate their account.

2 **Show Header Icon**
Show a default icon beside the header title.

3 **Exclude Communication Flows**
Hide flows from the Current and Available sections.

4 **Filter Communication Lists by Campus Context**
Filter lists by the page's campus context. Lists with no campus always show.

5 **Always Include Subscribed Communication Lists**
When campus filtering is on, still show *lists* the person already receives. Category filters still apply.

6 **Message Count Window (In Days)**
Set lookback days for message counts shown under Channel names (e.g., "1 Message Last 30 Days"). Set to 0 to disable.

7 **Manage My Account Page**
Choose the page opened by the `Manage My Account` button. The button shows if the person is deactivated or in *Unsubscribe Mode*. Leave the page blank to hide the button.

8 **Unsubscribe from Communication List Workflow**
Launch a workflow when someone unsubscribes from one or more lists. Rock passes the person as Entity and comma-delimited IDs in CommunicationListIds when present.

9 **Available Communication Channels**
Choose what to show in the Available section: *Show Only Previously Subscribed Channels* or *Show All Channels Available*.

10 **Communication List Categories**
Limit lists by category for *Communication Preference Mode*. If none, show all lists the person is authorized to view. Category permissions override list permissions.

11 **Communication Flow Categories**
Limit flows shown in *Current Communication Channels* for *Communication Preference Mode*. If none, show all flows the person is in.

12 **Show Medium Preference On Current Channels**
Show and allow changes to the person's preferred medium per list, like *SMS* or *Email*.

13 **Communication List Categories**
Limit lists shown in *Unsubscribe Mode*. If none, show all lists the person is authorized to view. Category permissions override list permissions.

14 **Communication Flow Categories**
Limit flows shown in *Unsubscribe Mode*. If none, show all flows.

15 **Allow Deactivating Family**
When selecting `Deactivate` on *Remove Me From All Church Involvement*, show option to deactivate the whole family when allowed. Hidden if the

person is in multiple families or not an adult.

16 **Inactive Reasons to Exclude**
Choose *Inactive Reasons* to hide when someone removes involvement using `Deactivate`. Examples: *No Longer Attending*, *No Activity*, *Moved*, *Deceased*, *Does not attend with family*.

You can also change the text in each section of the *Email Preference Entry* block using the `Customize Text` tab. This helps you match your brand voice, personalize the experience, or explain what action was taken. Lava is supported for all text fields.

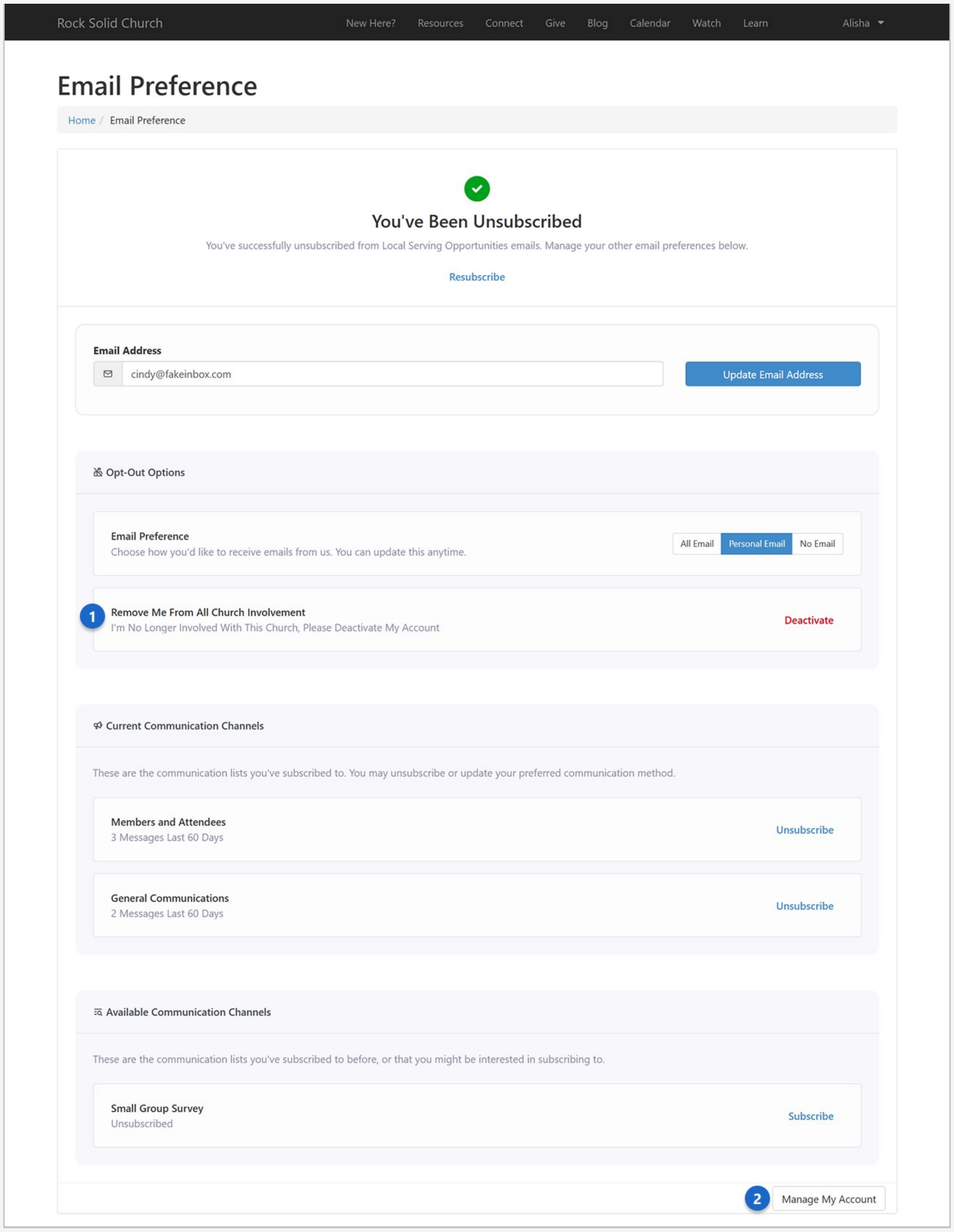
If you leave any text box blank, that text will not appear in the *Email Preference Entry* block.

Next, let's look at the other side of this block.

Unsubscribe Mode

If the *Email Preference Entry* block is accessed from an unsubscribe link, it will look a little different.

Unsubscribe Mode



1. **Remove Me From All Church Involvement**
   Takes the person to a confirmation screen where they choose whether to deactivate just themselves or their entire family, and provide a reason for leaving. This *Deactivation* action removes the person from all communications and sets their record to Inactive. You can disable family deactivation in the block settings and/or change the *Reasons* listed.

2. **Manage My Account**
   Displays the `Manage My Account` button automatically when in *Unsubscribe mode*. Clicking it navigates to the page configured under the Manage My Account Page block setting. If no page is set, the button won't appear.

Unsubscribe Mode is typically reached from an Unsubscribe link in an email. It includes a header showing which list or flow the user unsubscribed from.

There are different levels of unsubscription. For example, if someone unsubscribes from a personal email, their Email Preference changes from All Email to Personal Email. If it's already set to Personal Email, unsubscribing changes it to No Email. This approach respects each person's choice while taking the smallest unsubscribe step possible.

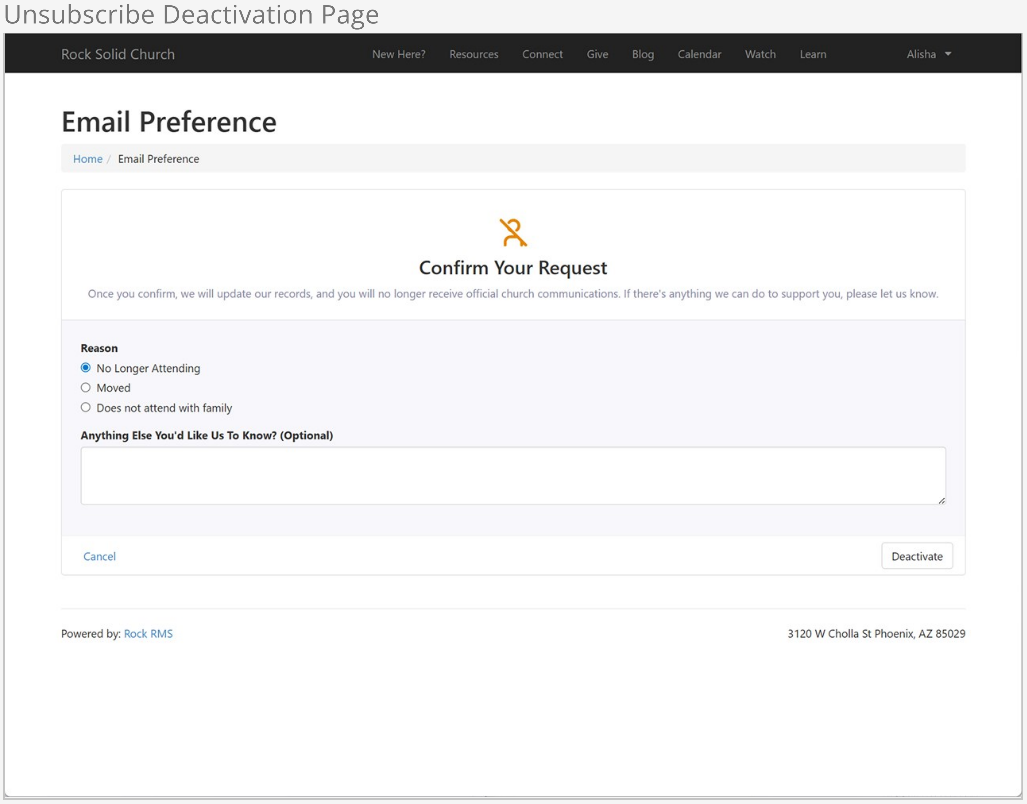
There's always a balance between organizations sending important updates and recipients wanting fewer irrelevant messages. The unsubscribe process helps reduce unwanted emails while avoiding a full disconnect between your organization and its people.

Most recipients secretly still want those key updates even after unsubscribing, but prefer control over what they receive. Giving them the option to resubscribe or unsubscribe from specific lists creates a better experience and keeps your communication relevant.

The Available Communication Channels section appears when someone unsubscribes from at least one channel. It lets them resubscribe or view other available channels they're not currently subscribed to.

The following page displays when `Deactivate` is selected as an *Opt-Out Option* in *Unsubscribe mode*.

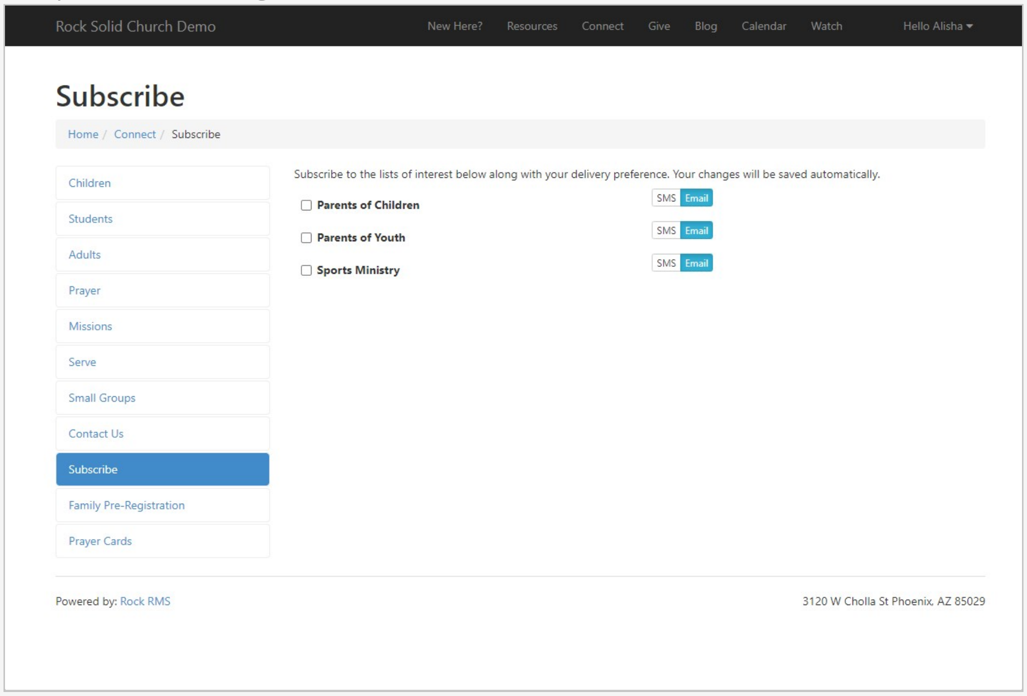
Unsubscribe Deactivation Page



Communication List Subscribe Block

Rock ships with the *Communication List Subscribe* block ready for you to use on your external website under `Connect > Subscribe`. This block will display the communication lists a person is subscribed to or can be subscribed to. Pictured below is an example of this block on the external website.

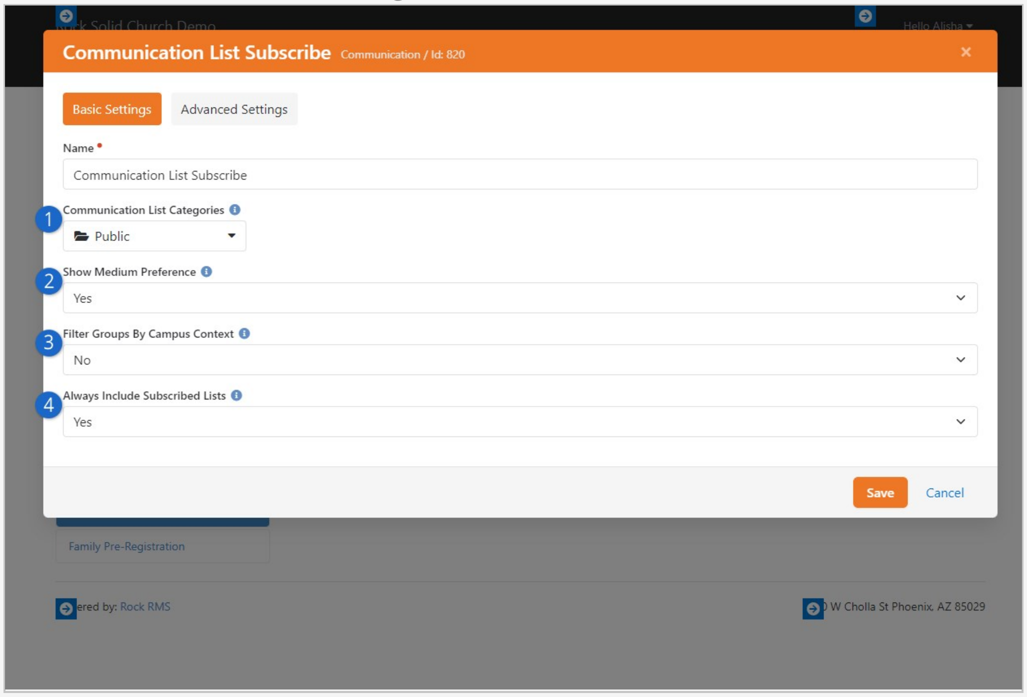
Sample Subscribe Page



In this example, the block shows the three communication lists that ship with Rock under the *Public* category: Parents of Children, Parents of Youth and Sports Ministry. Additional lists unique to your organization would be displayed here as well if the person is subscribed or is able to subscribe to them.

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. By default, this is set to display lists in the *Public* category.

Communication List Block Settings



1. **Communication List Categories**
   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.

2. **Show Medium Preference**
   For instance, the person could choose SMS or Email as their preferred medium.

3. **Filter Groups By Campus Context**
   Communication lists associated with a campus can be filtered using campus `context`.

4. **Always Include Subscribed Lists**
   If the campus context would normally filter out a list the person is subscribed to, this setting keeps it in place.

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.

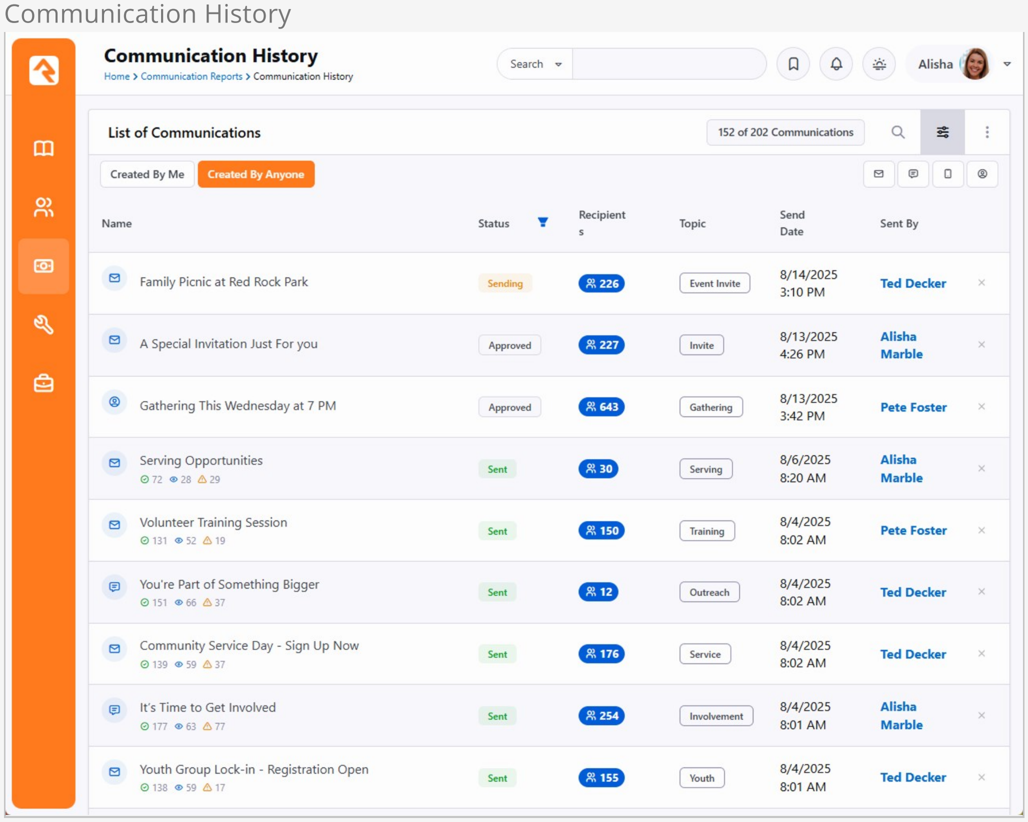
Communication History and Analytics

A communication from Rock continues to provide value even long after it's sent. Using the tools described in this chapter, you can measure the success of past communications to inform your future communications. You can even drill down to an individual's communication history to see which communications they engage with.

Communication History

Even for the most avid communicators, finding that email you sent five years ago... to just three people... is a breeze. Your list of communications can be filtered by status, topic, date and more. You can view your communication history under `People > Communication Reports > Communication History`.

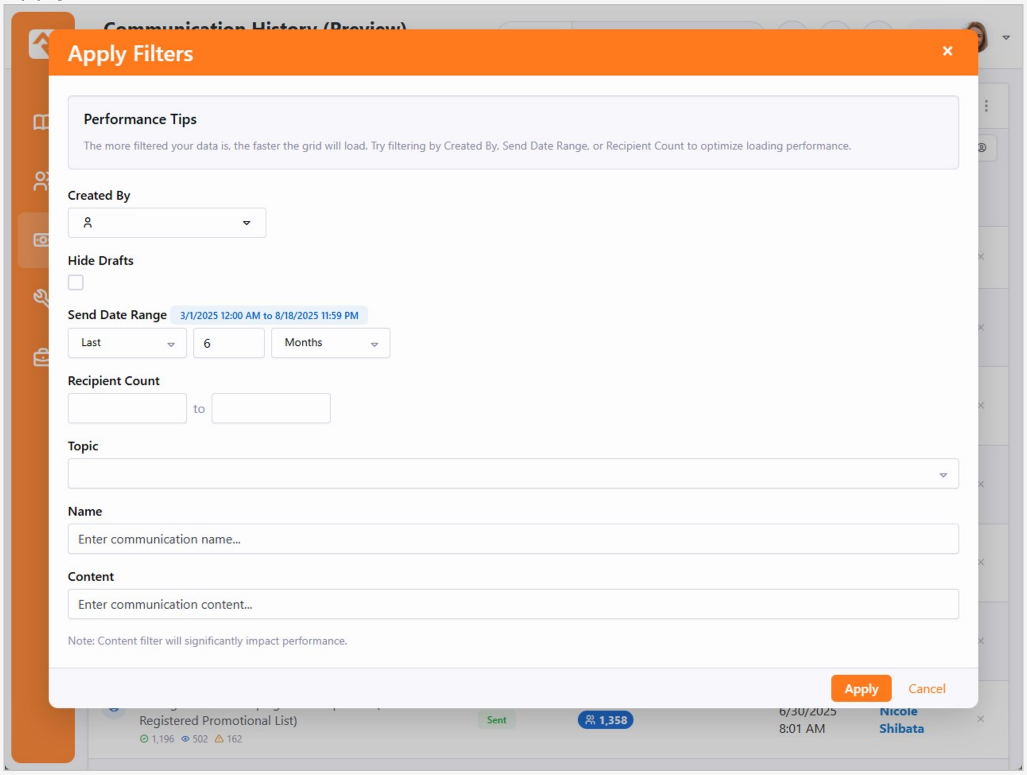
Communication History



With just a few clicks, you can narrow down your *Communication History* list to find exactly what you need. To filter by Communication Medium, use the icons at the top of the list: Mail Text Push Notification Personal Preference You can also filter or sort directly from the column headers. Click the icon to filter a column, or double-click any column to reverse the sort order.

Need even more control?

Apply Filters



Use the icon to open the List Settings panel. There, you can filter by:

- Creator
- Number of recipients
- Send date range
- Topic
- Communication name
- Even message content!

Important: Filtering Large Lists Improves Load Time

If your list includes hundreds or even thousands of communications, applying filters will improve performance and reduce load times significantly.

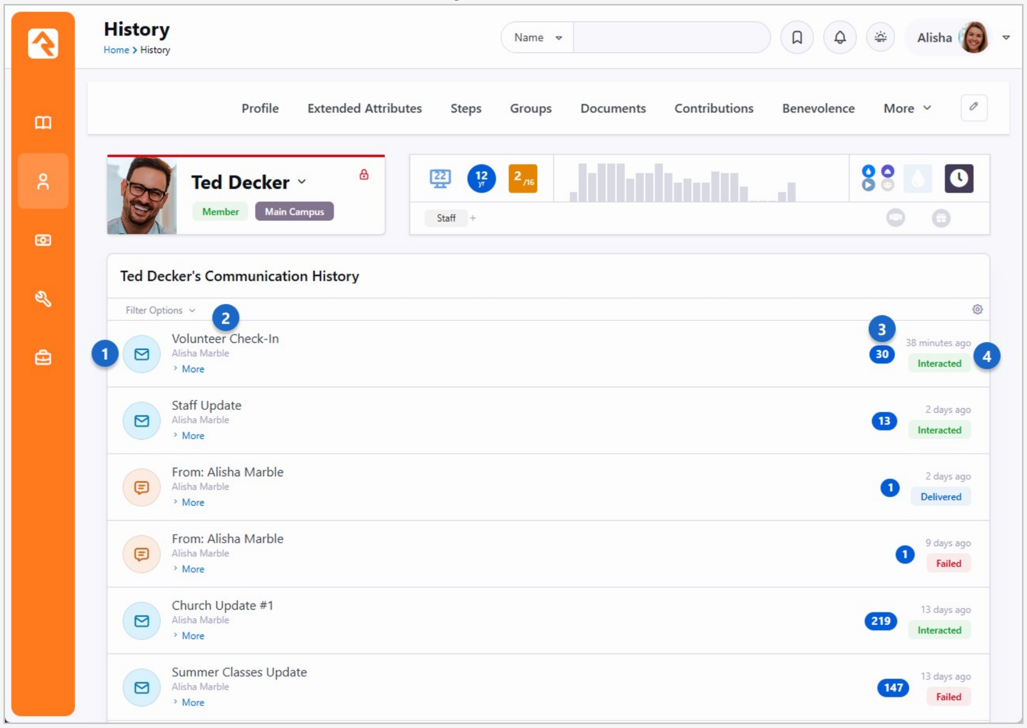
See the Bigger Picture

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

Person Communication History

A history of communications that have been sent to an individual can be viewed on the *Person Profile* page, under the History tab. This is where you'll come to find out which communications a person has received, and to view the details of those communications.

Person Profile Communication History



1 **Communication Medium**
From this block you can view push notifications, emails or SMS messages the person has been sent.

2 **Message Summary**
Here you can see the subject (for emails) and title (for SMS/push) of the communication. You can also see who sent the communication. Clicking *More* will provide details about each communication, as pictured in the next screenshot below.

3 **Recipients**
This column shows a count of how many recipients received the communication.

4 **Date and Status**
The date the communication was sent is shown for reference. You can also see the *Status* of each communication:

- Cancelled
- Delivered
- Failed
- Interacted
- Pending
- Sending

> **Phone Number Security in Communication History**
> You can set a security which allows specific people to view the SMS messages when setting up the SMS communication. But please note that the personalized communication history block does not respect SMS view access. This means that people will be able to see the SMS communication even if they do not have the security permission to do so.

Communication Analytics

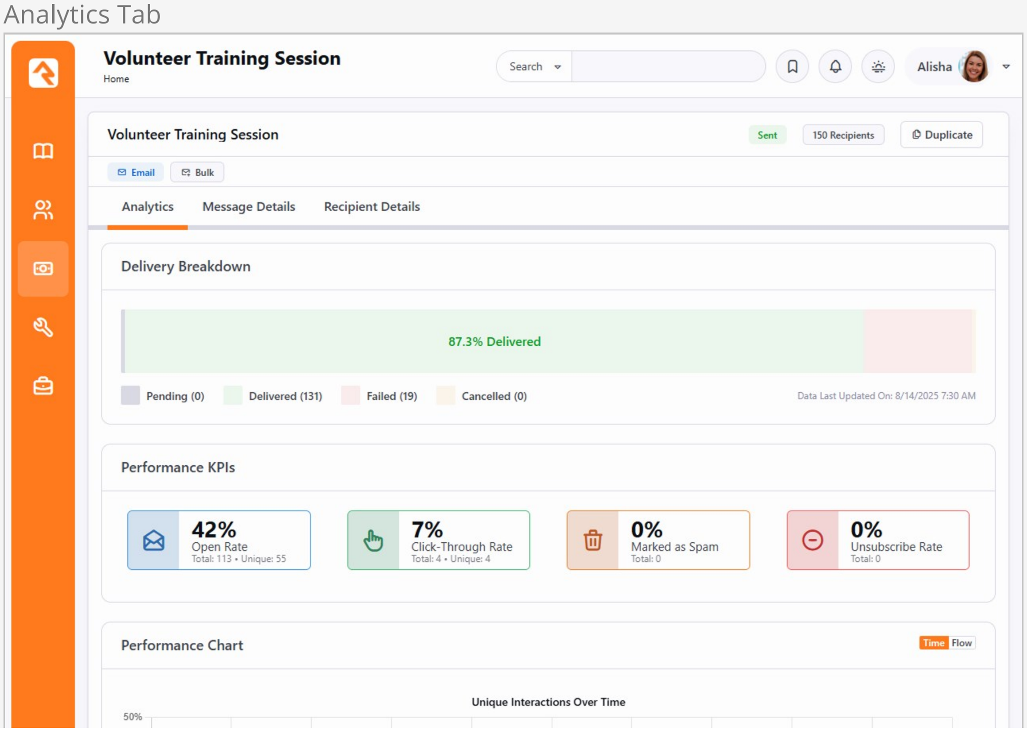
Communication is important, but what matters most is how it's received and what people do with it. Did the right people see it? Did they engage or tune it out? Rock helps you find answers fast with visuals and charts that show exactly how each communication performed. You'll see not just who received your message but how it looked, what they did with it and how they engaged. Every detail counts and Rock makes sure you can track the ones that matter.

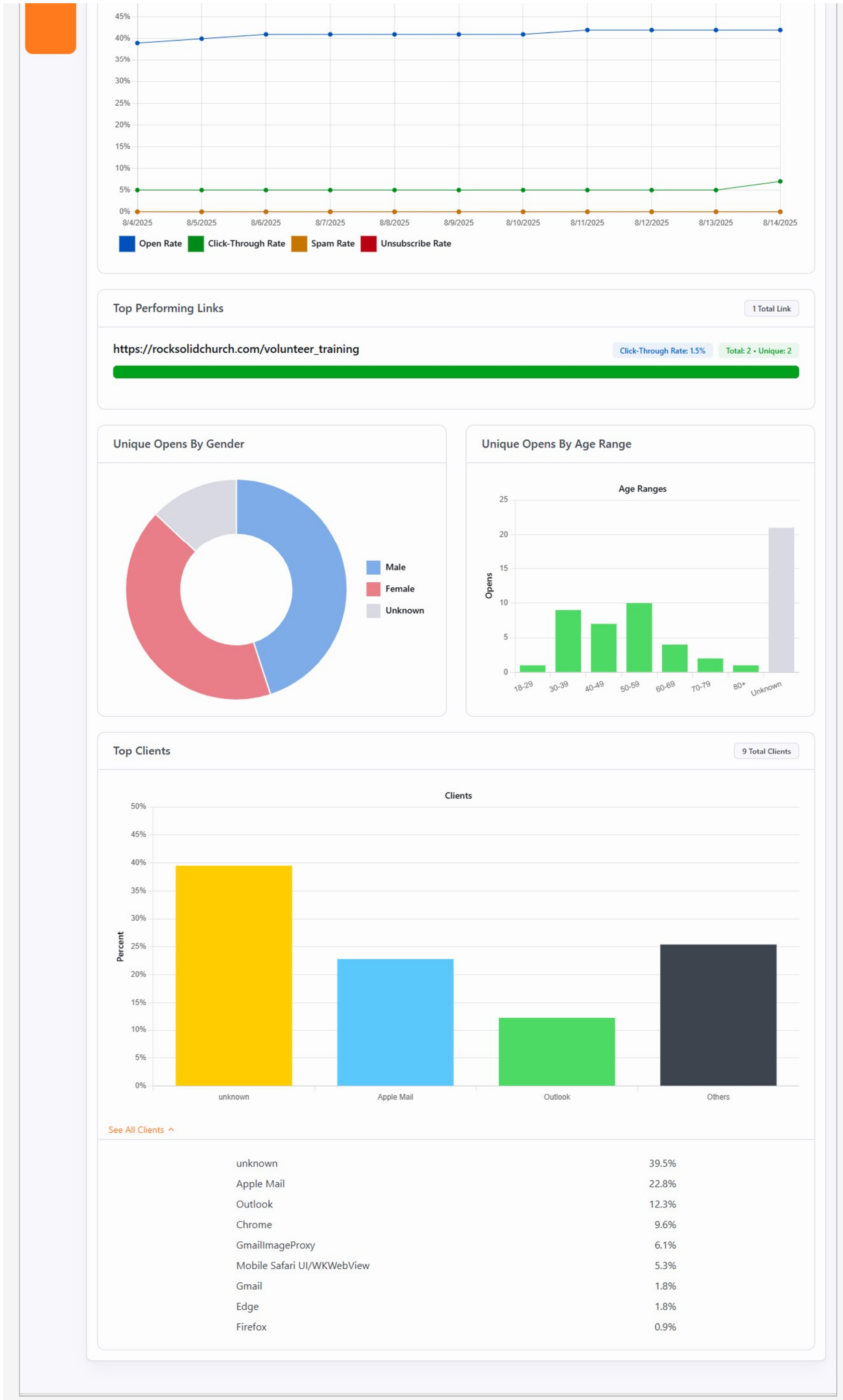
When you open a message from the *Communication History* list, Rock displays a detailed analytics page showing delivery status, engagement rates and other key insights. You can monitor opens, clicks and calls to action to see what resonated. And if you're using an email integration, you'll get even deeper metrics to help you refine future messages.

With services like Mailgun you can see how many people have opened your message and even which links they've clicked. To learn more about Mailgun, see the Integrations chapter below.

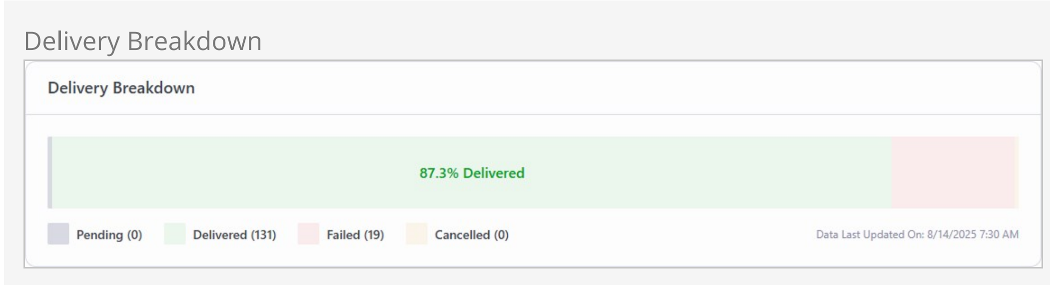
Analytics Tab

Analytics Tab





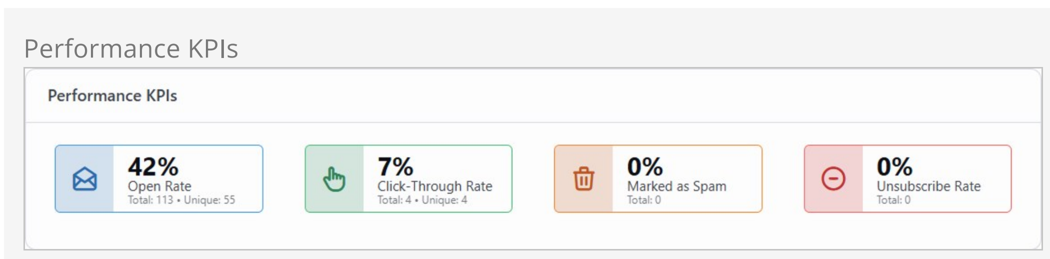
Delivery Breakdown



Analytics show how your message moved through the system: from queue to open (or not). The states shown depend on the transport used, so you might not see every one every time.

- **Pending** - Your message is saved or queued but hasn't gone out yet. Think of it as waiting in line.
- **Delivered** - The message made it to the recipient's server. For email, this means it landed at their provider, like Gmail or Outlook, not necessarily in their inbox.
- **Failed** - The message couldn't be delivered. Usually caused by a hard bounce or an invalid address.
- **Cancelled** - The sender called it off. This status shows up when a communication is cancelled before sending.

Performance KPIs

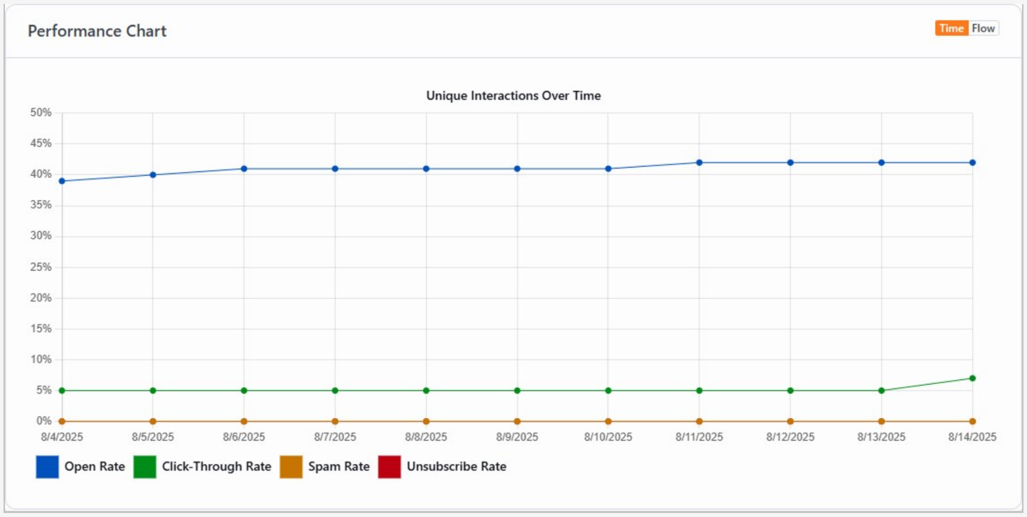


Get a snapshot of how your message performed after sending: opens, clicks, unsubscribes and more.

- **Open Rate** - Percentage of recipients who opened your message. The higher the better!
- **Click-Through Rate** - Measures how many people clicked a link in your message. One of the best signs of engagement.
- **Marked As Spam** - The number of people who flagged your message as spam in their inbox.
- **Unsubscribe Rate** - Tracks how many people unsubscribed from future communications.

Performance Chart (Time)

Performance Chart (Time)



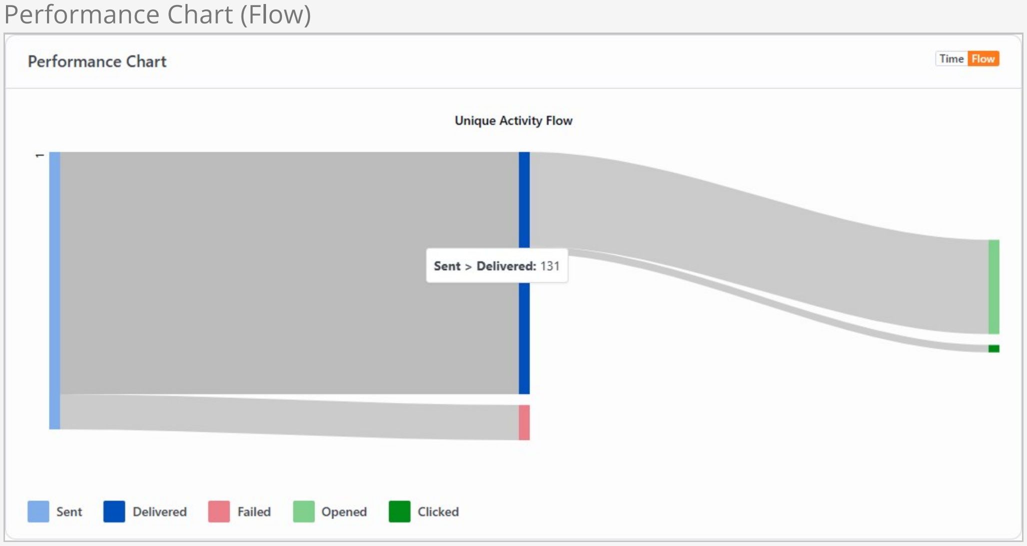
This chart shows how your key metrics trend over time. You'll see rates for opens, clicks, unsubscribes and spam complaints plotted across the first 45 days after sending (or from launch to today if the message is older).

Use this view to spot patterns—for example, if clicks surge on the first day but drop off quickly, or if unsubscribes rise after a certain number of days.

Switch to the Flow option in the picker (top right) to see the same performance data, but with a different lense.

Performance Chart (Flow)

Performance Chart (Flow)



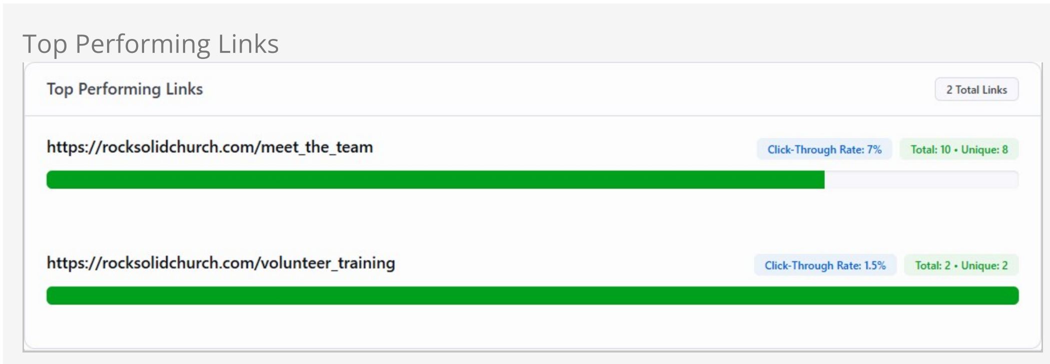
The flow view illustrates how recipients move through the stages of your message, from sent to delivered to opened and clicked. This helps you see the full recipient journey at a glance.

How to Read This Chart

The chart flows left to right. Each color represents a status, and the width of the band shows how many people reached that stage. Hover over a band to see exact counts.

For example, you might see that most messages were delivered, fewer were opened, and only a fraction were clicked. This makes it easy to gauge drop-off points and overall engagement.

Top Performing Links



This report shows which links received the most clicks, insight you can use to refine future messages. Each link displays:

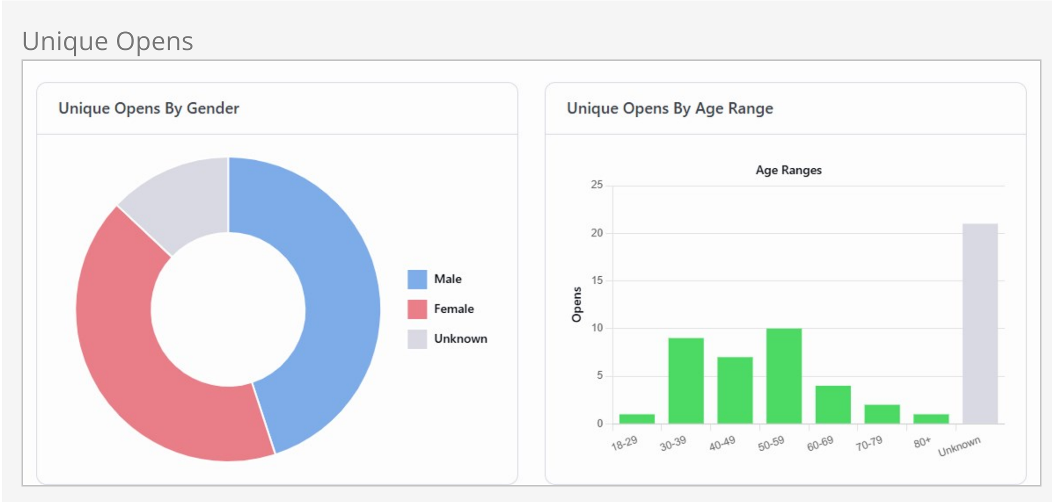
- **Click-Through Rate** – the percentage of recipients who clicked that link.
- **Total Clicks** – how many times the link was clicked overall.
- **Unique Clicks** – how many distinct people clicked the link.

What Does Click-Through Rate Mean?

The Click-Through Rate shows how many unique recipients clicked a link compared to how many people received the message.

For example, if 100 people received the message and 10 clicked a link, that link's Click-Through Rate is 10%.

Unique Opens

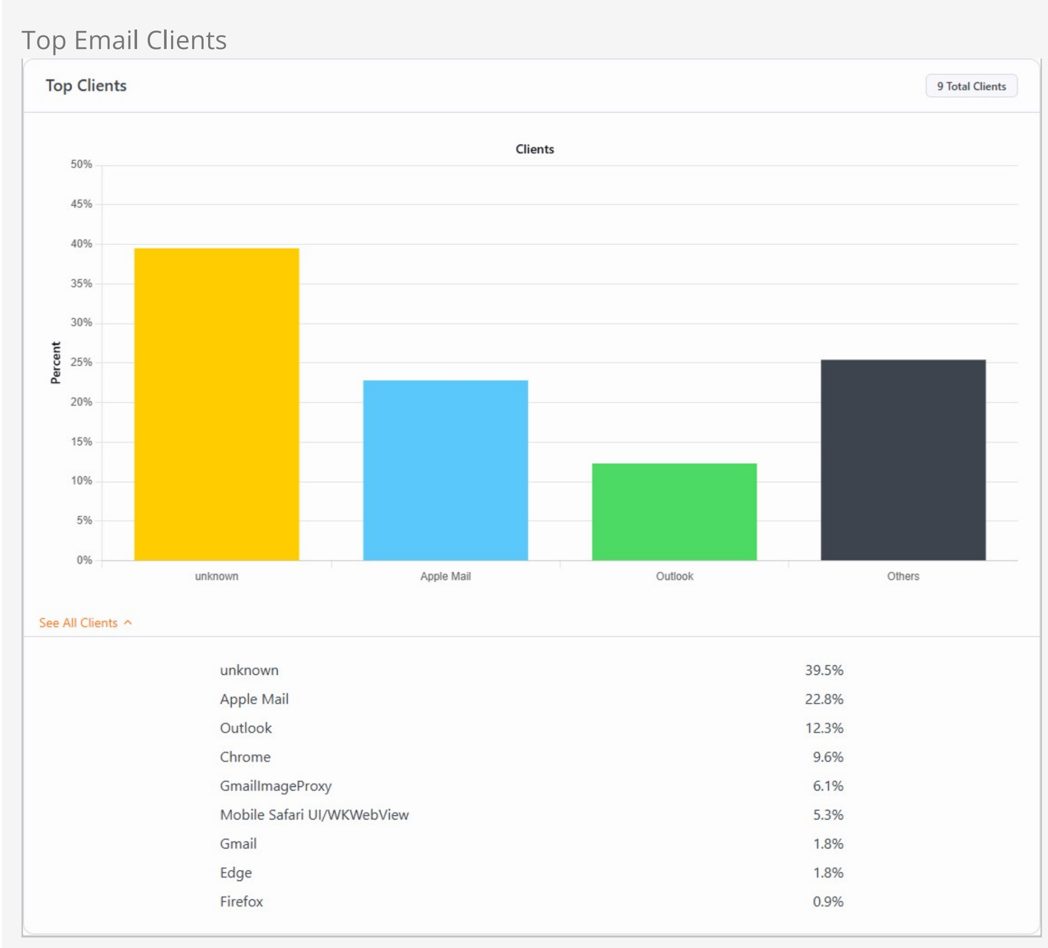


These charts break down who opened your message, helping you see which groups are most engaged.

- **By Gender** - Shows open rates by gender. Useful for spotting engagement differences across your audience.
- **By Age Range** - Shows opens across age brackets. Use this to gauge which generations are interacting most with your communication.

Keep in mind that some people may not have gender or age data recorded in Rock, so they'll appear in the *Unknown* category.

Top Email Clients



This chart shows which email apps your audience used to open your message. Knowing the most common clients helps you design messages that display well across devices.

The list includes percentages for each client, along with an *Unknown* category when the system can't detect the app.

> **Medium Matters**
>
> Analytics vary depending on the medium you used to send the message. Email provides detailed insights like client usage, while SMS and push notifications only include basic stats such as delivery. Many metrics like *Top Client* apply only to email.

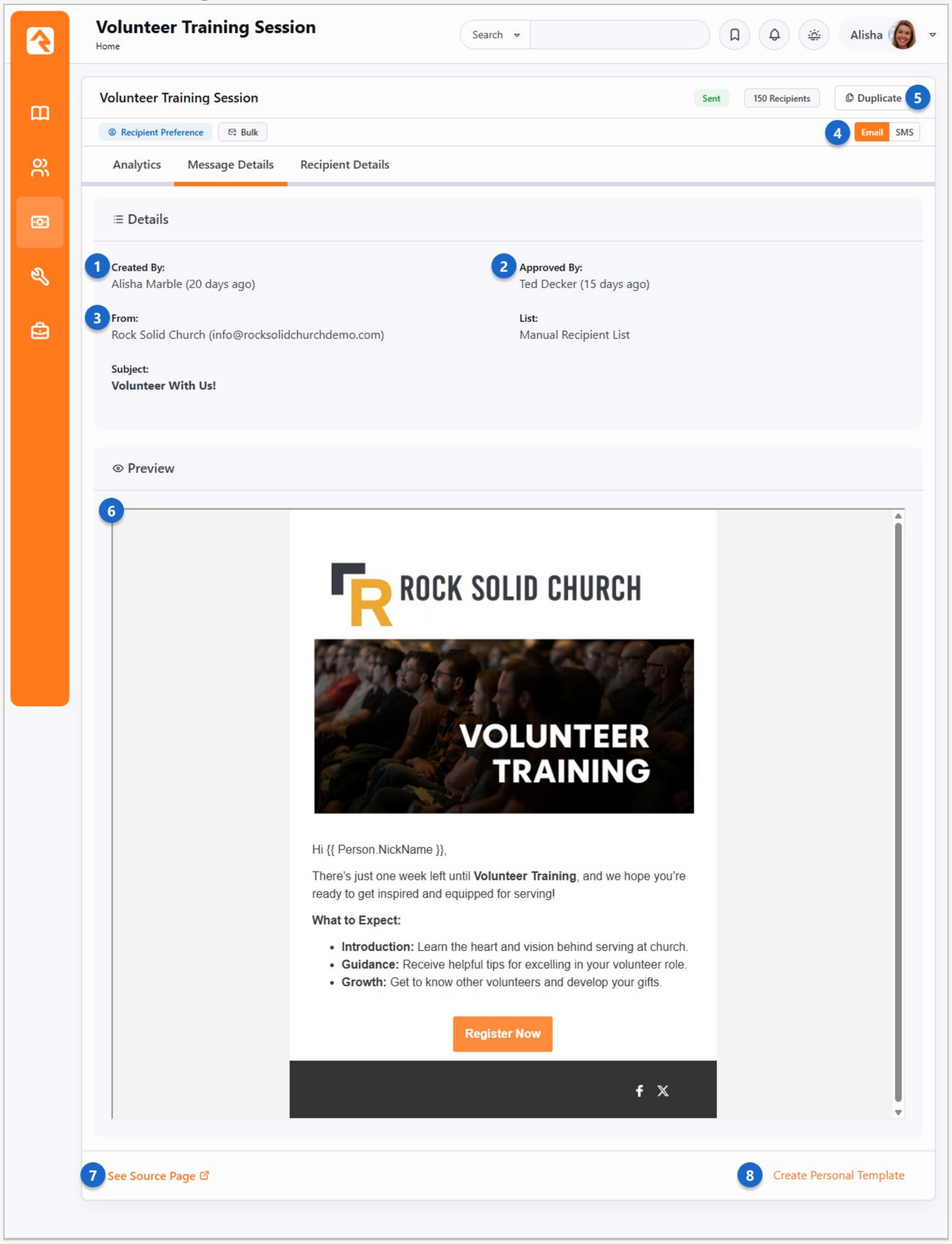
Analytics give you the big picture of how your message performed. Next, let's look at the message itself:.

Message Details Tab

Email

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.

Volunteer Training Session



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**
   Here you'll see the "From" value that's being used, as well as the subject of the email and the recipient list it was sent to.

4 **Change Communication View**
Right now we're looking at the Email version of the message, but you can toggle over to SMS to see the SMS version of the communication. This will only appear if the communication was crafted to send both Emails and SMS text messages.

5 **Duplicate**
Using the *Duplicate* link will create a new communication with the exact settings used for this communication, opening in the *Communication Wizard*. The recipient list will be 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.

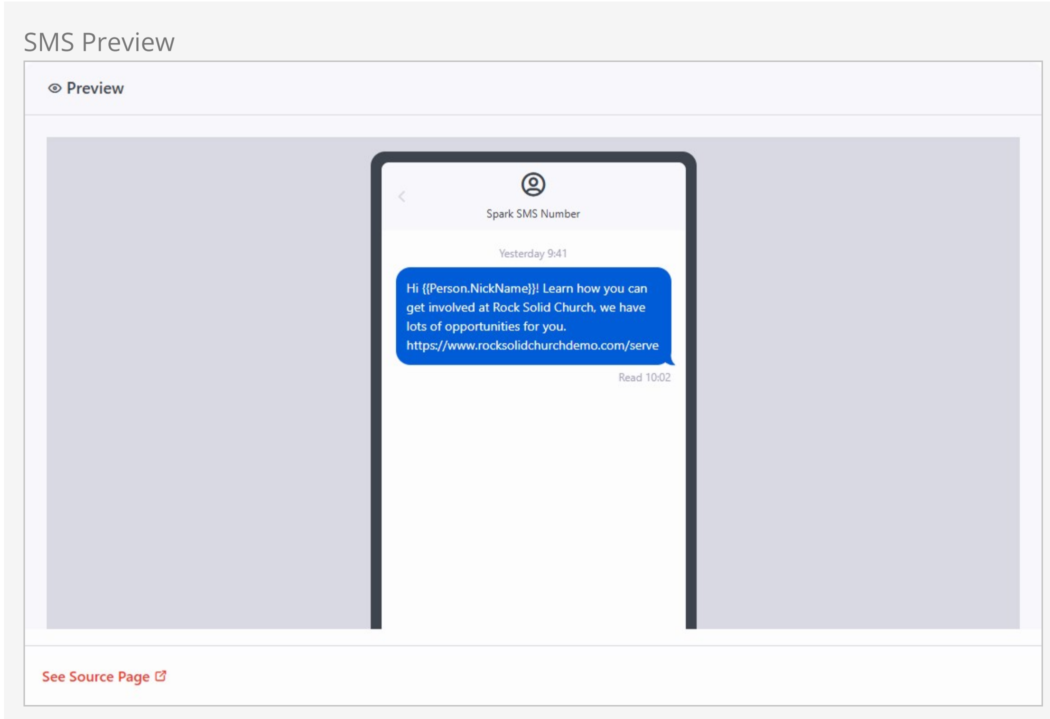
6 **Message Content**
If the communication originated from a list block, such as those associated with data views or small groups, clicking this link will take you to that page.

7 **See Source Page**
See where this communication launched from, if it was from a Data View, it will navigate to that Data View, if it was from a grid, it will take you to that page.

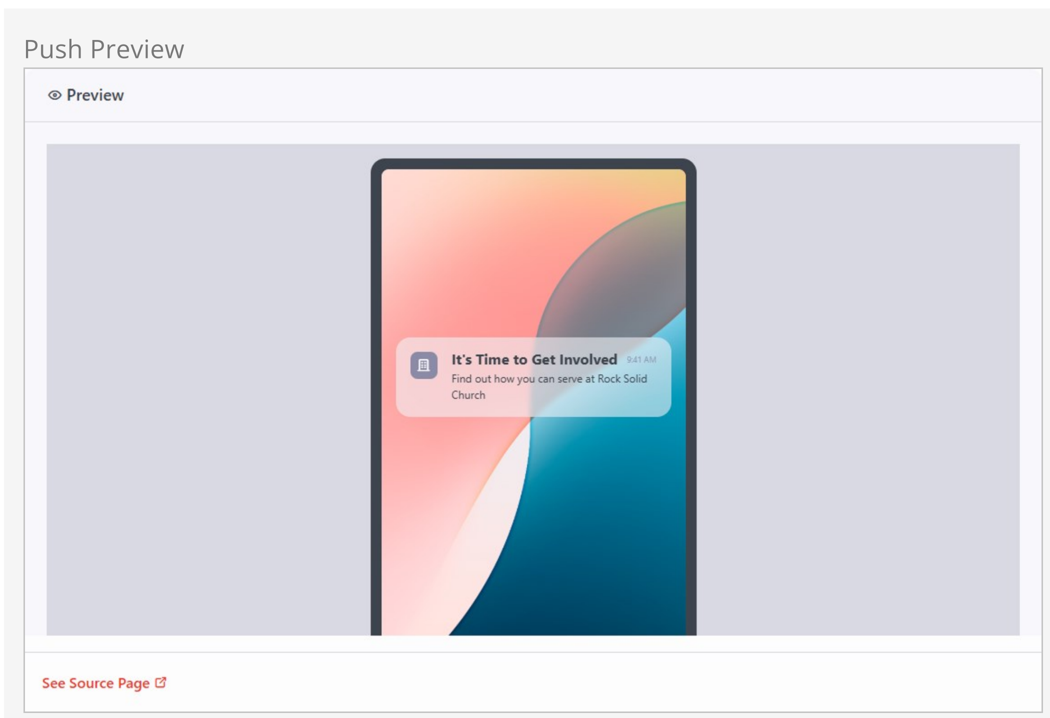
8 **Create Personal Template**
Turn this communication into a reusable template. For more on templates see the Templates chapter. Note that you must *Enable Personal Templates* in the block settings.

If the communication is a draft (i.e., not yet sent) you'll also see the option to *Cancel Send*. Additionally, if the communication hasn't been approved, you will have the option to approve or deny from this screen.

SMS



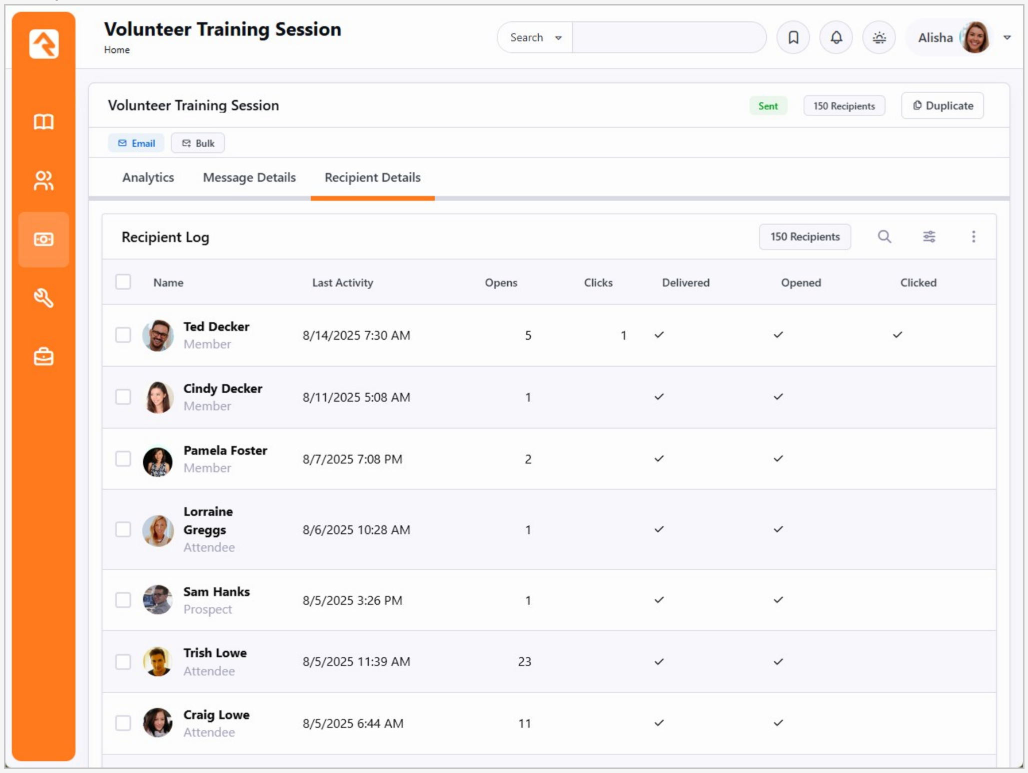
Push



Recipient Details

Communication is personal, and Rock makes it easy to see how each individual engaged with your message. The *Recipient Details* tab shows exactly who received the message and how they interacted with it as if you were there when they opened it (but not in a creepy way!). This is especially useful when you want to track opens, clicks and delivery for specific people.

Recipient Details



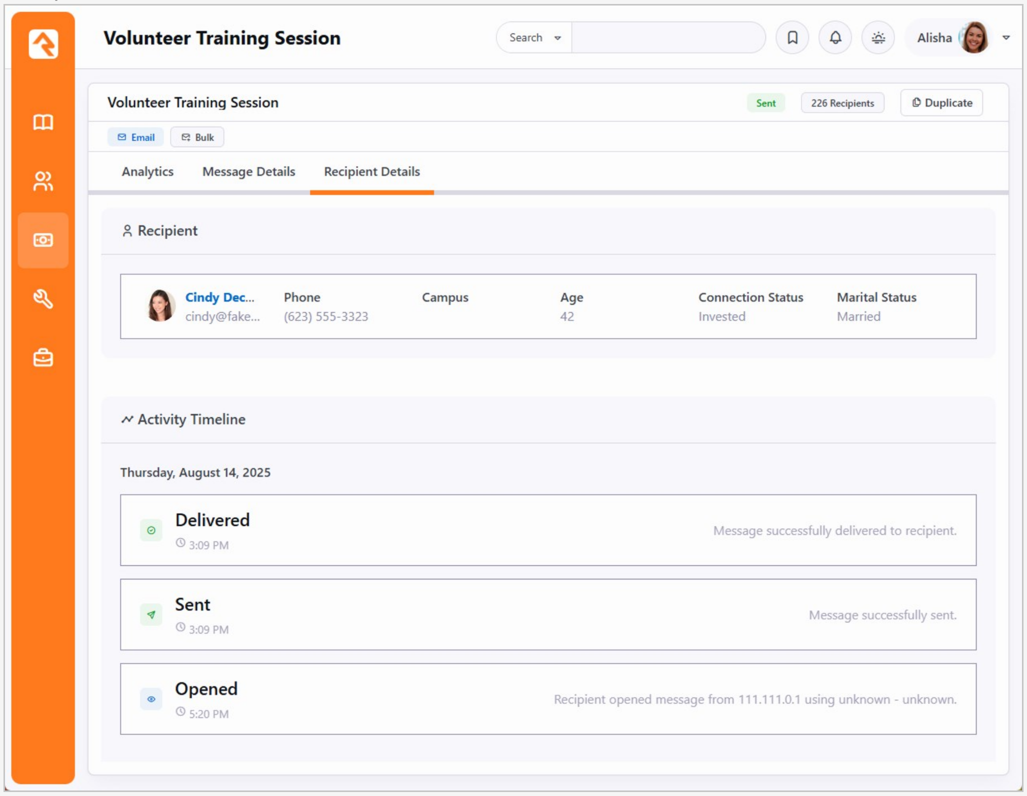
You may have hundreds of recipients in a bulk email, so use to sort and filter by column, or to add extra columns with details such as:

- Age
- Birthdate
- Gender
- Email
- Custom Person Attributes

You can filter or sort these columns just like the main list.

And when you select a recipient, you'll see the nittiest-grittiest details: when the message was delivered, if they opened it and whether they clicked a link.

Recipient Details



Communication Transports Matter

The transport you use (for example, *Mailgun*) determines how much detail you'll see in your analytics. Some providers offer in-depth metrics, while others only provide high-level data. For more on the differences between transports, see the Integrations chapter below.

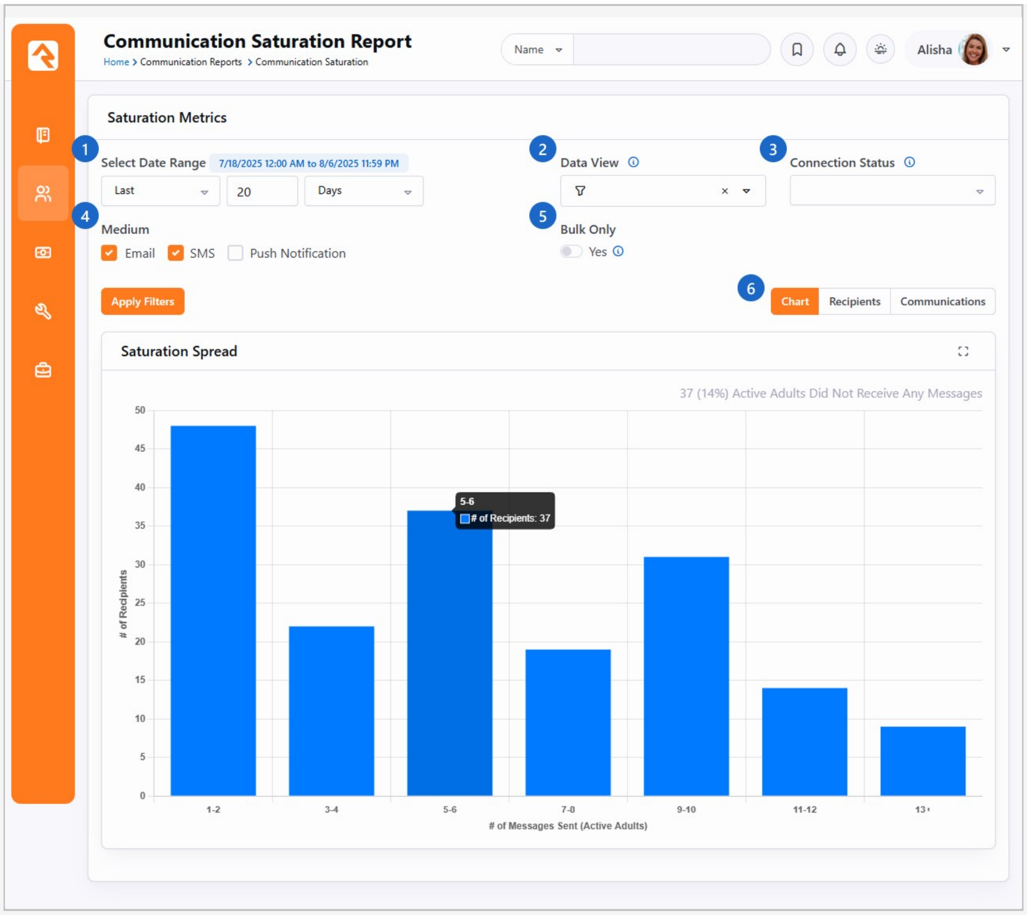
Communication Saturation Report

You may have had this experience before: your phone has been pinging off the charts, and you think you may have become famous! After opening your inbox or messages, you see it’s the same reminder you got last week… and the week before. Your next dental appointment needs to be scheduled. You already knew that but didn’t get around to messaging them back. Nothing makes you want to click the `Unsubscribe` button more. The truth of the matter is that each and every communication matters. Using Rock’s communication features, you have great power to send messages for anything and everything under the sun, but loading a member’s inbox can feel impersonal.

The *Communication Saturation Report* helps you keep tabs on recipients who may feel overwhelmed by the amount of communication they are receiving. In this report you can see the "Saturation Spread", "Top Recipients" of communications and "Communications With Most Recipients". Each one informs your communication strategy.

To see the report navigate to `People > Communication Reports > Communication Saturation`.

Use The Communication Saturation Report



1 Select Date Range
Choose the time period you want to report on. This sets the window for the communication metrics shown.

2 Data View
Filter your report using a Data View to focus on a specific group of people—like a ministry team or demographic segment.

3 Connection Status
Narrow results by Connection Status, such as visitors, members or attendees. Great for analyzing communication impact by group stage.

4 Medium
Pick which communication mediums (Email, SMS, etc.) to include. If you don’t see one listed, you can configure it in Mediums and Transports.

5 Bulk Only
This toggle limits the report to bulk communications only. It is switched off by default.

6 View Select
Choose the format for your report. Each view offers a different angle:

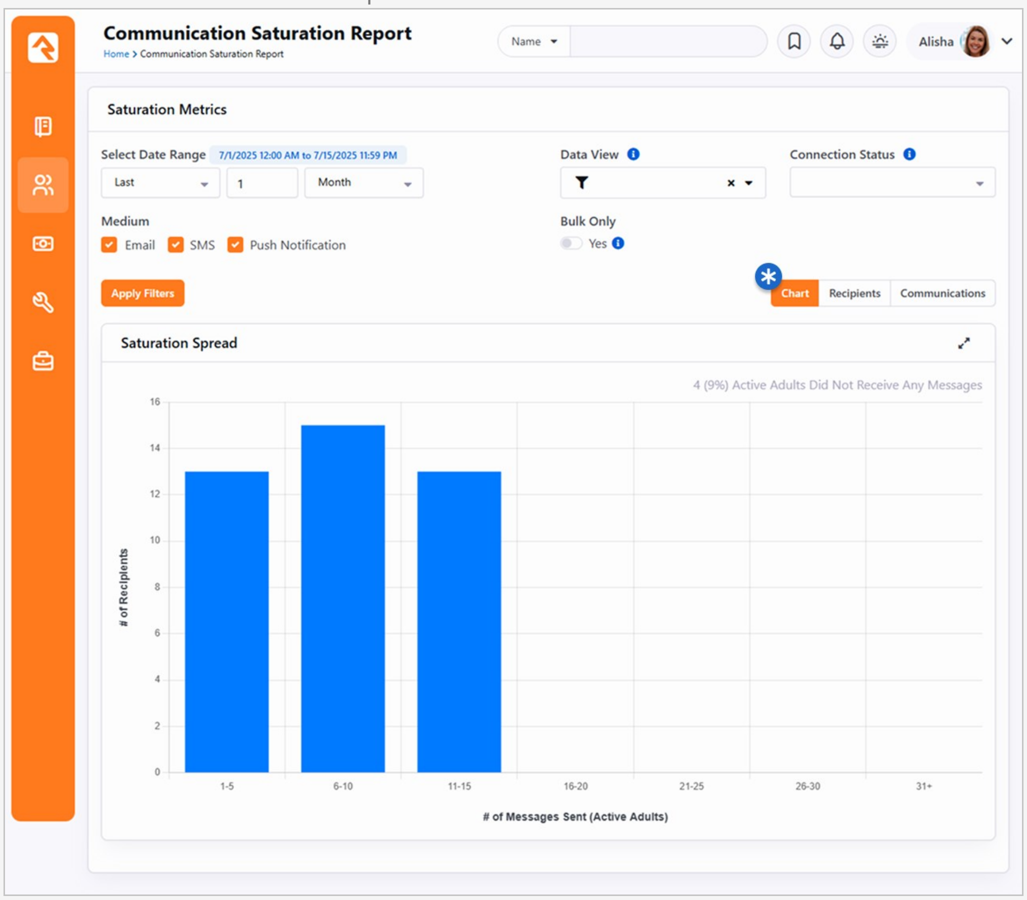
- *Chart*: Shows how many people received messages over time.
- *Recipients*: Highlights who is receiving the most messages.
- *Communications*: Displays which communications had the widest reach.

Chart View

The *Chart* view shows the number of messages each person has received within your specified time frame. For example, you will notice that 13 people received 11-15 messages this month! Those people probably feel a little overwhelmed. Maybe it's a sign to press `Send` a bit less this month.

Discover the count and percentage of contacts who haven't received any communications. Look for the gray text at the top right of the chart.

Communication Saturation Report - Chart View

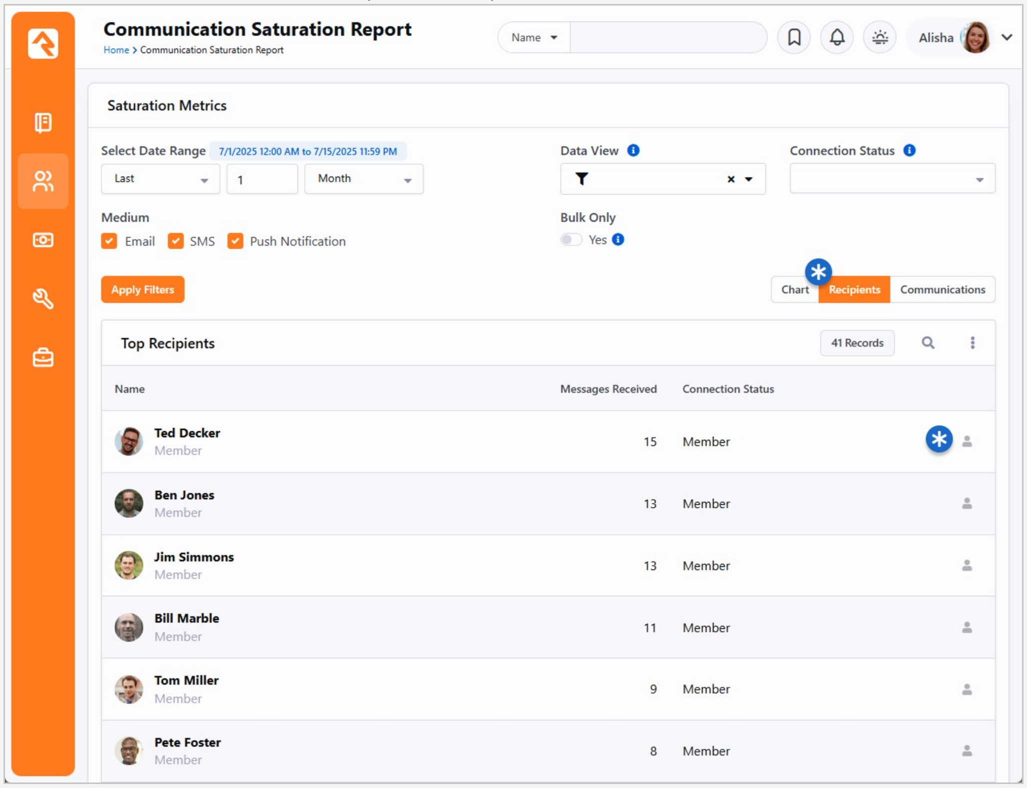


Recipients View

The *Recipients* view helps you drill down into your communications to see which individuals are receiving the most messages. Every person matters, and sending bulk communications can make it hard to know whose attention you're demanding. By filtering on *Connection Status*, you get a clear picture of which segments (e.g., visitors, members or attendees) are hearing from you most often. You may discover that members receive the lion's share of messages (which usually makes sense) or uncover new prospects whose inboxes are overloaded. Either way, these insights help you adjust your strategy for maximum engagement.

Studies show that 57% of consumers who unsubscribe from an email do so because they received too many (OTA, 2018, p. 4). Keeping the number of emails you send to recipients each week below three is a good practice. Clicking takes you to the *Communication History* for the specified person, where you can see exactly which messages they've received.

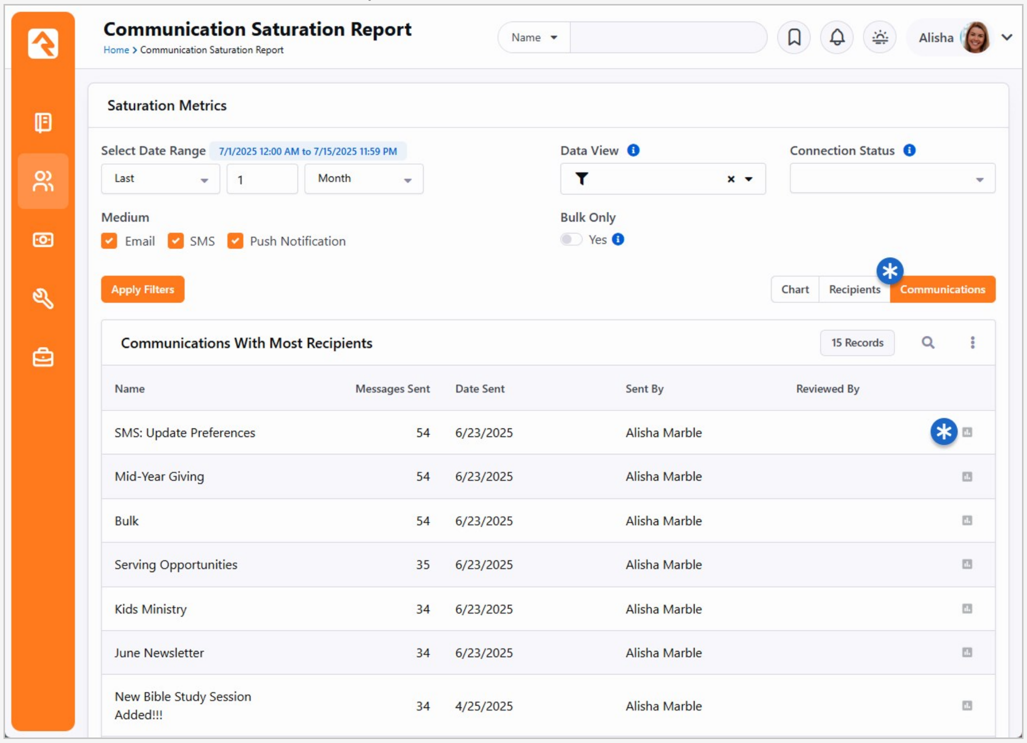
Communication Saturation Report - Recipients View



Communications View

Find the communications reaching the widest audience. On closer look, that bulk message might not have needed to hit every inbox. The more focused your communications, the more impact they'll have. Click the icon to view *Email Analytics* for that specific communication.

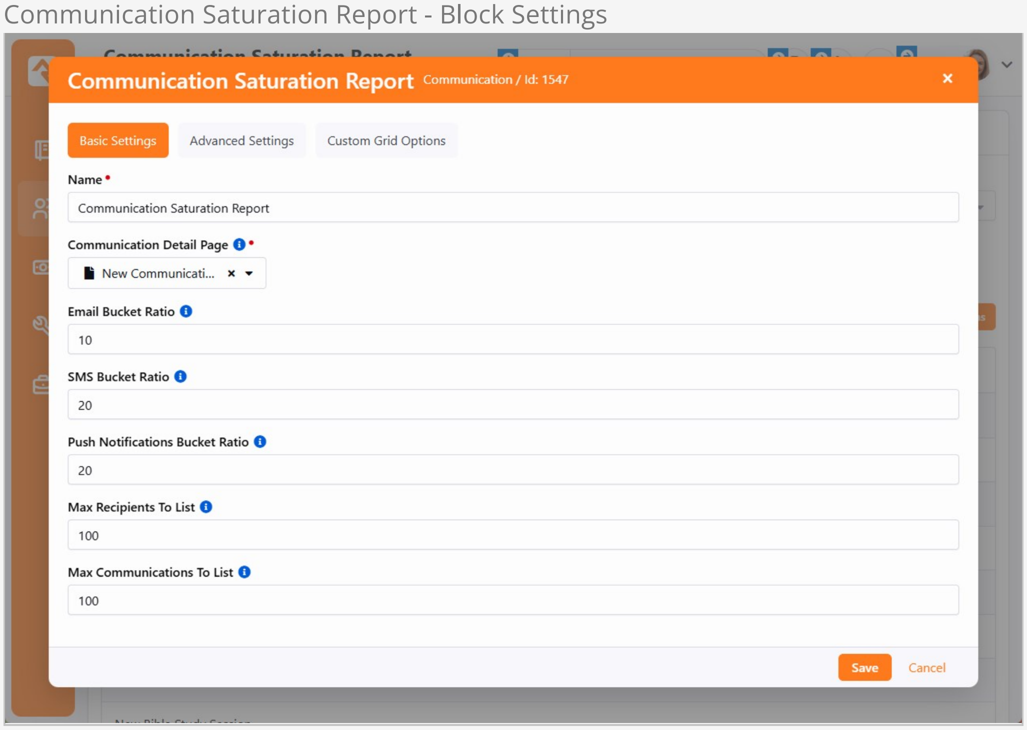
Communication Saturation Report - Communications View



Block Settings

These settings adjust how your report displays, so it's worth taking a moment to explore them.

Communication Saturation Report - Block Settings



Email/SMS/Push Notification Bucket Ratio

Sets how many days each x-axis bucket covers in the chart. If the ratio is 10, each bucket spans 10 days of your selected date range. A 30-day range with a ratio of 10 will yield buckets like 1–3, 4–6, 7–9 days, etc. Note: The system defaults to the lowest bucket ratio when multiple mediums are selected.

Max Recipients To List

Sets the max number of recipients shown on the Recipients report. Fewer names mean faster load times, but less visibility.

Max Communications To List

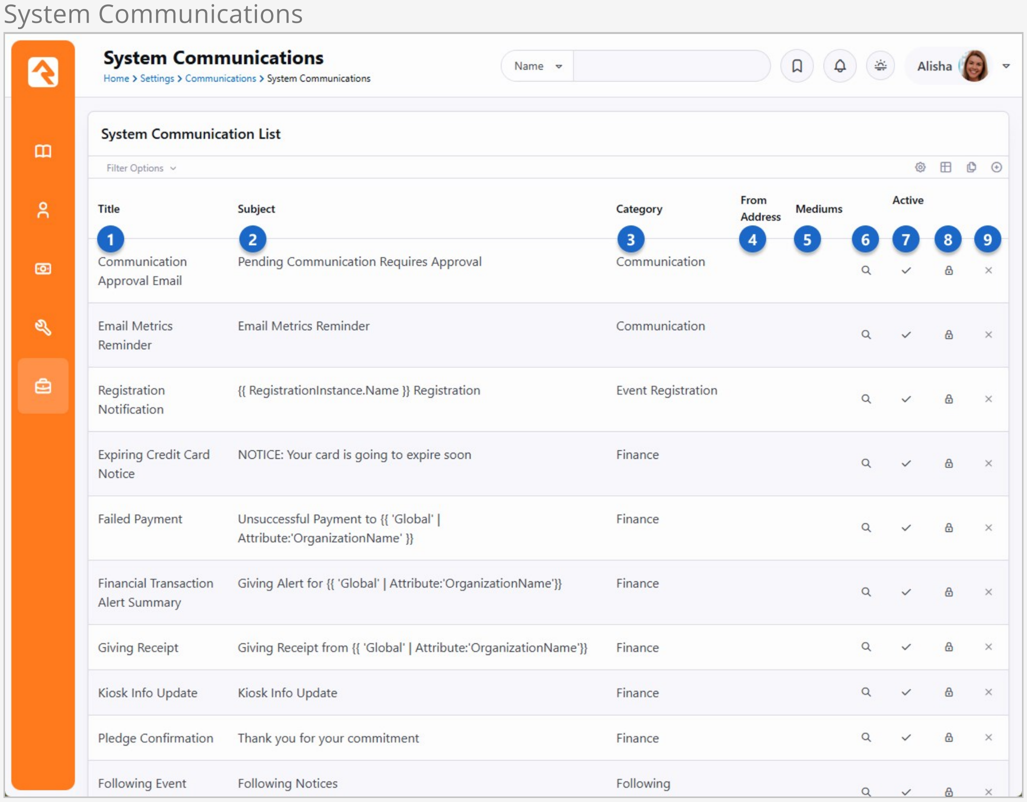
Sets the max number of communications shown on the Communications report. Fewer items means quicker loading, but less detail.

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 > Settings > System Communications`.

System Communications



1 **Title**
This is the name of the system communication. This is only used internally and would not appear in the communication itself.

2 **Subject**
The subject line of the system communication is displayed here for

reference. This can help you identify the system communication you're looking for.

3. **Category**
   Every system communication must be associated with a category. If needed, you can add or remove categories from `Admin Tools > Settings > Category Manager`. System communication categories use the *System Communication* entity type.

4. **From Address**
   If you have a *From Address* configured in the system communication, it will be displayed here for reference.

5. **Mediums**
   Here you'll see *SMS* or *Push* tags, indicating that the system communication is configured for those mediums.

6. **Preview**
   Clicking the icon will show you a preview of the communication, as it would look if sent to a particular person at a specific time. See below for details.

7. **Active**
   This simply shows whether the system communication is currently active.

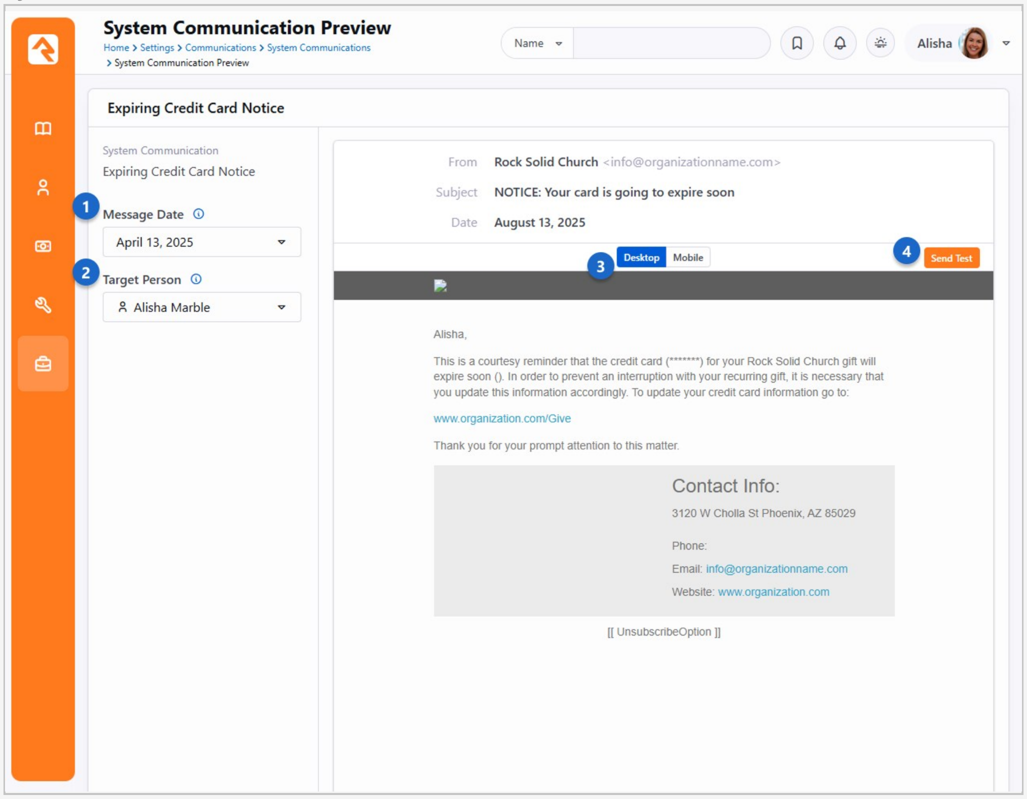
8. **Security**
   You can apply security to each system communication individually. This will restrict who can see the communication on the *History* tab of the *Person Profile* page and on the *Communication Detail* block.

9. **Delete**
   You can probably guess what this does. Only system communications that are not marked as *Is System* can be deleted.

System Communication Preview

As noted in the screenshot above, you can click the icon to view a preview of the system communication. However, this is not the typical preview you might be used to seeing when editing the system communication. This is a special preview that's interactive, allowing you to choose a person and a date to populate merge fields. This helps you see what the communication will look like with certain merge fields filled in.

System Communication Preview



1. **Message Date**
   Here you can select a date, showing you what it would look like if the communication was sent on that date. In order for this to appear you need to have a merge field of `SendDateTime` somewhere in the communication template, and a *Send Day of the Week* must be selected in the block settings.

2. **Target Person**
   This defaults to the current person but can be changed to any person. Changing this will populate any Person merge fields in the communication, showing you what it would look like if it were sent to that person.

3. **Desktop/Mobile**
   Here you can toggle between the Desktop and Mobile views of the communication.

4. **Send Test**
   You can click this to send a quick test to an email address that you provide.

> **CSS Inlining**
>
> CSS Inlining of Email Templates is only available if the email Communication Transport supports it. You can allow CSS Inlining for all emails by updating the Communication Medium settings.

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. 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

As of this writing, 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. For full details and up-to-date pricing visit their website. 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.

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.

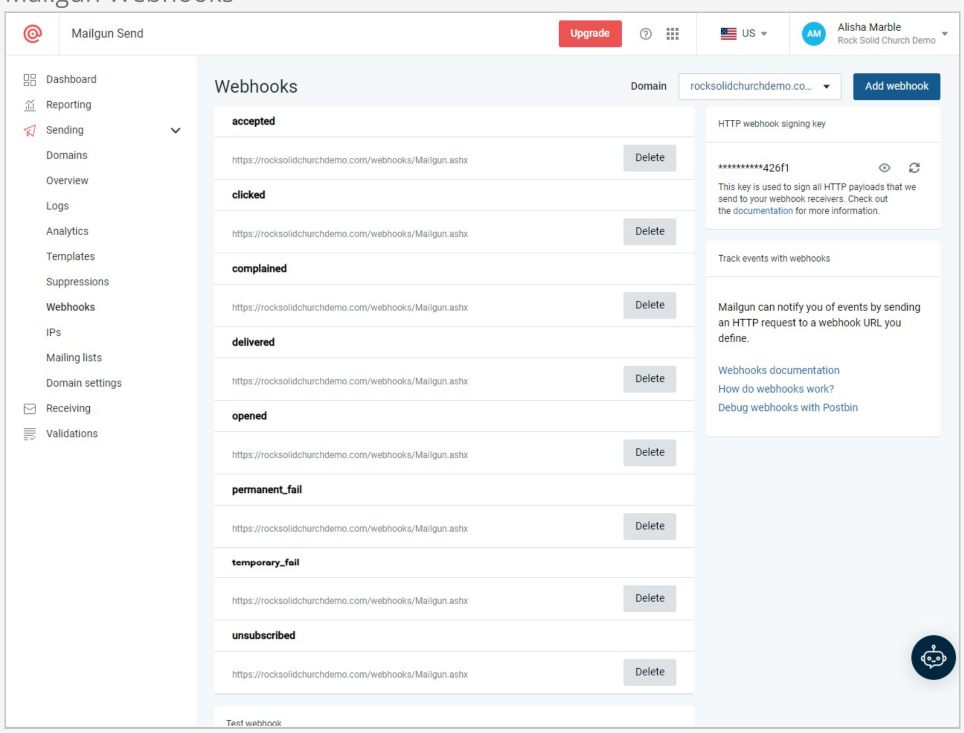
> **Mailgun Updates**
>
> In late 2023, Mailgun changed its key structure, providing both *Mailgun API keys* and an additional *HTTP webhook signing key*. In Rock versions 14.4, 15.4, 16.1, and later, separate fields in the Communication Transport settings accommodate these keys. For new Mailgun accounts, you'll use either the standard account-wide *Mailgun API keys* or domain-specific *Sending API keys* as the *API Key* in Rock. Additionally, the *HTTP Webhook Signing Key* should be added to the corresponding field just below the *API Key*. Existing accounts only need action if you've changed your Mailgun API keys.

1. Sign up for a new account on the Mailgun website.
2. 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.
    b. On the API Keys page, reveal the full *HTTP Webhook Signing Key* by clicking the eye-shaped icon. Keep track of this key, you will need it in Rock.
    c. Below the webhook key you'll find a section called *Mailgun API Keys* that you'll use to create your API key by clicking the *Create API Key* button. You'll need to provide the key a short name and click *Create Key* to continue.
    d. Be sure to immediately copy the API key that appears on the screen. Not only will you need it in Rock, but this is the only time you get to see it. It is not the same as the *Key ID* listed in Mailgun.
    e. If you lose your key, you'll need to create a new one by clicking the *Add new key* button.
3. Set up your domain.
    a. Head back to the Dashboard page and click the *Add a custom domain* link near the middle-right of the page.
    b. Provide your domain name and choose an IP assignment option. You may need to upgrade your plan before you can use a dedicated IP, as noted in the prior section above.
    c. On the following page, Mailgun will walk you through the DNS changes that

need to be made to ensure the best delivery and spam protection.

4. Next, return to the Dashboard and scroll to the bottom to see your list of domains.
    a. Click the gear icon to the right of your domain and go to Settings. On the new page click the *SMTP credentials* tab.
    b. Under the *SMTP credentials* heading, note the login and password. You might need to reset the password.
    c. On the same page, below the Login information, note the value under *SMTP settings* (it will probably be "smtp.mailgun.org").
5. Take a breather! You're almost done. The last step in Mailgun is to configure the webhooks. To do this select *Webhooks* from the left-hand navigation. On the webhooks page, click the *Add webhook* button near the top-right of the page.
    a. You'll need to add a webhook for each "Event type" in the list.
    b. Put *https://[yourserver.com]/webhooks/Mailgun.ashx* as the URL for all events (see image below).
    c. The Open and Click tracking options need to be turned on in the Domain Settings in the Mailgun site. It's located in the Tracking section under the Domain Settings tab. Once you turn these on, the data will be tracked.

Mailgun Webhooks



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

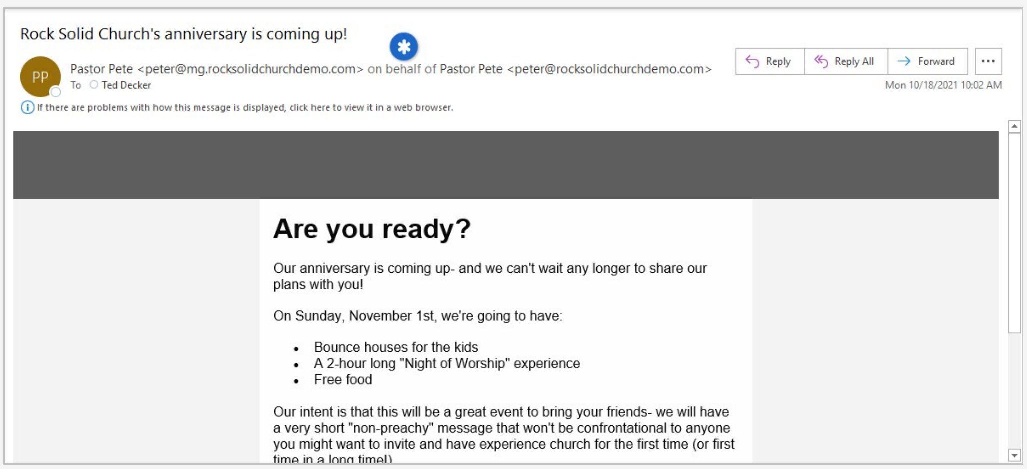
Long-time users of Rock and Mailgun may recall the "Legacy Webhooks" section. As of April 2023, Mailgun no longer supports the Legacy Webhooks configuration. If you only have Legacy Webhooks set up, you'll need to move the addresses to the "Webhooks" section as shown. It's likely that Mailgun has automatically done this for you, but you may want to check to be sure.

6. Let's head back to your Rock server. First, let's enable the Mailgun Transport under `Admin Tools > Settings > Communication Transports > Mailgun HTTP`. Start by changing the *Active* setting to "Yes". Next, provide the *Mailgun API* key and the *HTTP Webhook Signing Key* from above. Finally, add the domain that you want your email to come from (this must match the domain that was configured in Mailgun).
7. 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 > Settings > Communication Mediums > Email`. Select "Mailgun HTTP" under *Transport Container*.

On Behalf Of

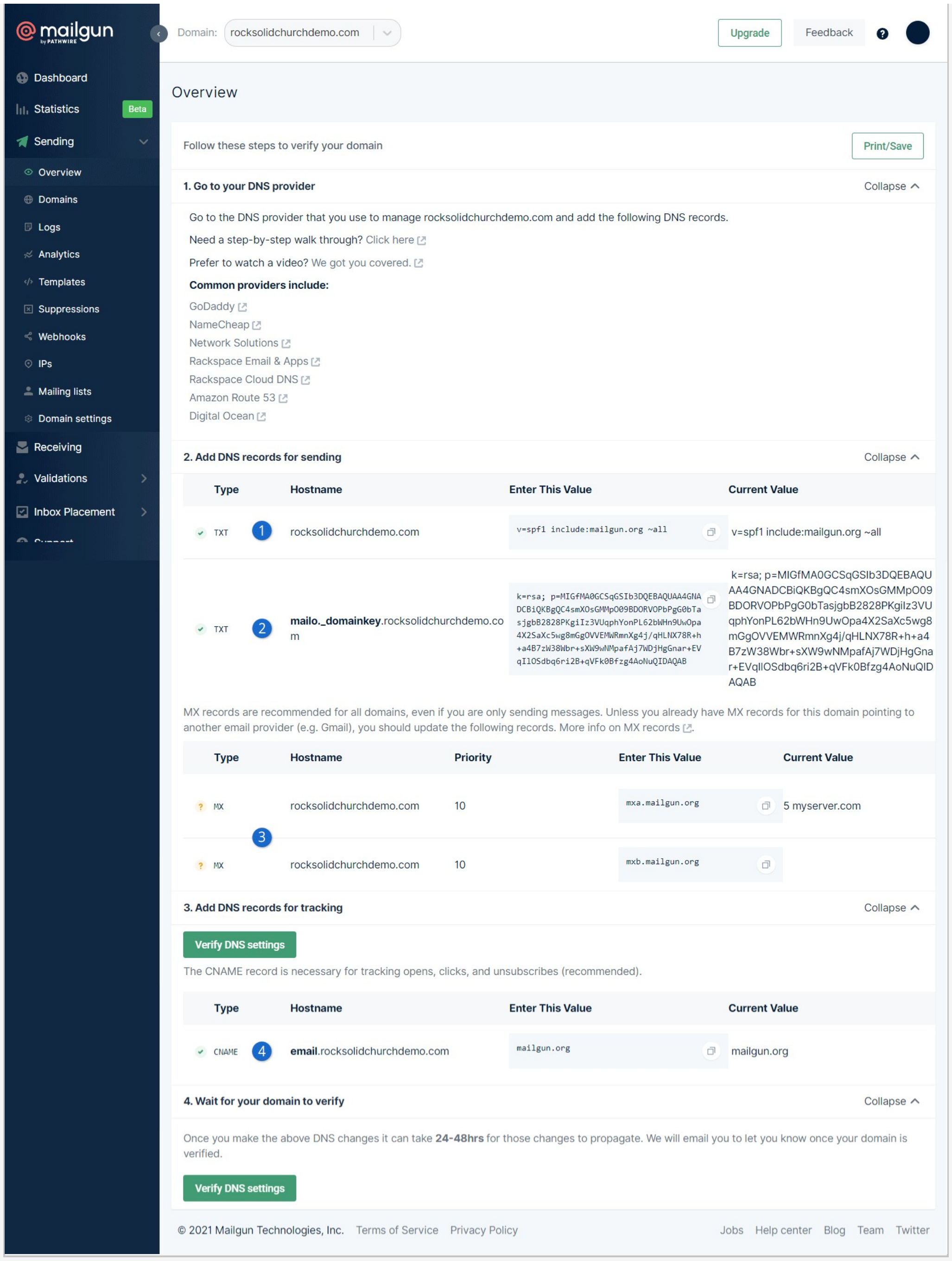
Following the instructions on Mailgun's site may lead to a scenario where your emails are sent "on behalf of" your domain. In short, this happens when the domain of the Sender field and the domain used in the From field are different. For instance, the Sender field would be something like `mg.rocksolidchurchdemo.com` while the From field would be `rocksolidchurchdemo.com`.

Email With On Behalf Of



In order to resolve this, the domains should match. The domain that you're sending emails from needs to be added to your Mailgun account and verified. In the above example, the domain `rocksolidchurchdemo.com` would need to be configured in Mailgun, and your DNS records (all except MX) would need to be updated accordingly. When you're finished, your domain overview in Mailgun will look similar to the example pictured below.

Mailgun Domain Settings

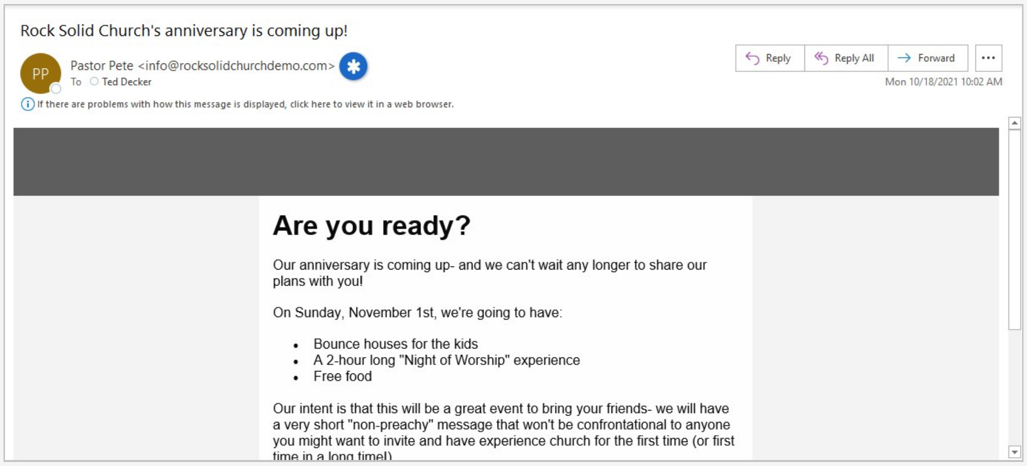


1. **SPF Record**
   You probably already have an SPF Record; in which case you should just add `include: mailgun.org` to your existing record rather than creating a new one.
2. **DKIM Record**
   You'll create a new TXT record in your existing domain that matches what Mailgun shows here.
3. **MX Records**
   If you're using your actual email domain, you should **not** modify these records. Note that in this screenshot the MX records are unconfirmed, which is expected for this approach.
4. **CNAME Record**

Mailgun will use the CNAME record to inform Rock of opens and clicks. You'll need to create a new record like Mailgun shows.

Lastly, make sure the new domain is added to your Mailgun Communication Transport configuration under `Admin Tools > Settings > Communication Transports > Mailgun HTTP` per the instructions in the prior section above. With the new domain set up and ready to go, your emails will no longer have the "on behalf of" notation. If you had an old domain that you were using (like `mg.yourserver.com`) it's no longer needed in Mailgun.

Email Without On Behalf Of



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.

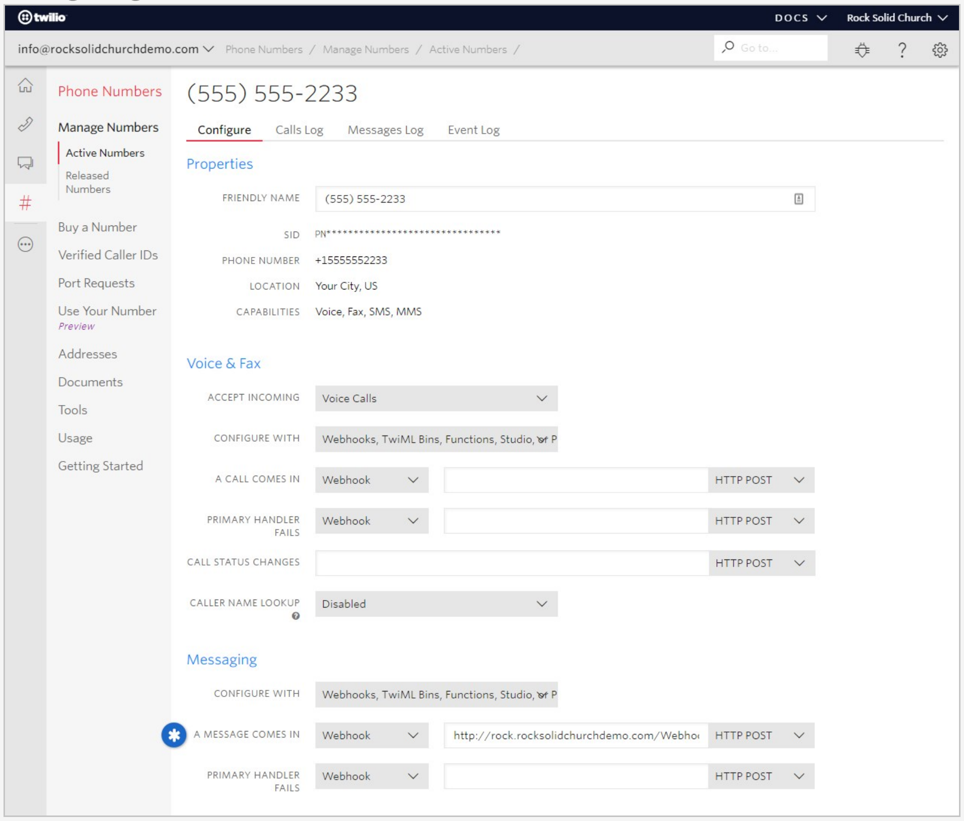
1. From the Twilio website click the sign-up link, then provide your account information. You'll then need to verify that you have a pulse by typing in a verification code they text to you. Finally, select a phone number to tie to your account and proceed to your account information.
2. On your account page note your *Account SID* and *Auth Token*. You'll need this for Step 5 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 this 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?SmsPipelineId=-YourPipelineId-

Configuring the Twilio Webhook



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 > Settings > 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 > Settings > Communication Mediums > SMS`.
7. Finally, add your Twilio phone number under

`Admin Tools > Settings > System Phone Numbers`.

You can add as many Twilio numbers here as you wish. Be sure that the phone number is in the *Phone Number* field and that it is in the format of “+15555555555” (or similar for international numbers). If you select an Assigned to Person, be sure the individual you select has a valid SMS phone number on their record.

Twilio Signature Validation

When you’re setting up your Twilio transport as described above (step 5), you’ll have an option to Enable Signature Validation. You’ll want to enable this if you're concerned that a system other than Twilio might try to send incoming SMS responses to your Rock server. Enabling this is a small step you can take to possibly avoid a lot of unwanted messages, and it helps keep your data secure.

In short, Signature Validation compares your *Public Application Root* (this is a Global Attribute in Rock) to the webhook that’s set in Twilio. If they match, the validation is successful, and the message will come through as usual. If they don’t match, then the message won’t reach Rock. There’s a bit more to it than that, and it gets a little technical, but we strongly recommend checking out the details on Twilio’s site so you can get this set up.

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 $100 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

> Note
>
> Gmail is not a commercial Email Delivery Service and has significant limitations on how many messages can be sent per day, how many identical messages can be sent to different addresses, etc. Using Gmail as your email delivery service is not a viable solution for most organizations and should only be used for testing. You will want to implement one of the other email transports discussed in this section for production use.

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

Email: SendGrid

SendGrid is another supported Transport you can use in Rock. Like the other options described above, be sure to evaluate each service before deciding which is the best fit for your organization's needs.

Most of the configuration you'll need to do will be with SendGrid. You can learn more and get started for free by visiting https://sendgrid.com/. After you're set up with SendGrid, you'll need to provide the following in Rock:

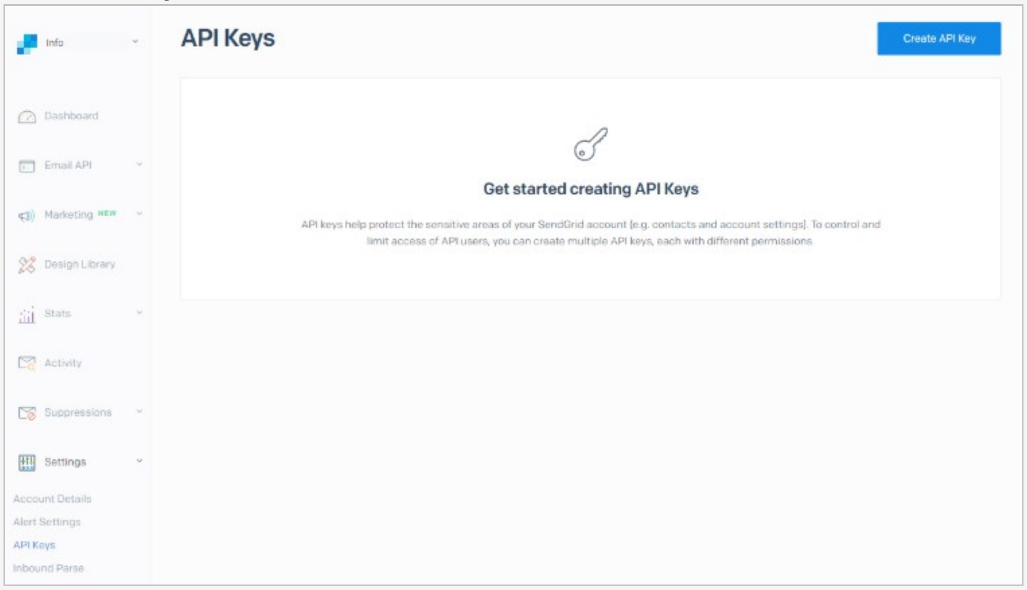
- **Base URL:** The default URL `https://api.sendgrid.com` should work in most cases. You can change this if needed based on your setup in SendGrid.
- **API Key:** SendGrid will provide this when you're set up with their service. This is required for Rock and SendGrid to communicate.

Like other Communication Transports, you can also choose whether SendGrid should track email opens, clicks and unsubscribes. Note that Rock only supports HTTP/S (and not SMTP) for SendGrid.

Setting up SendGrid

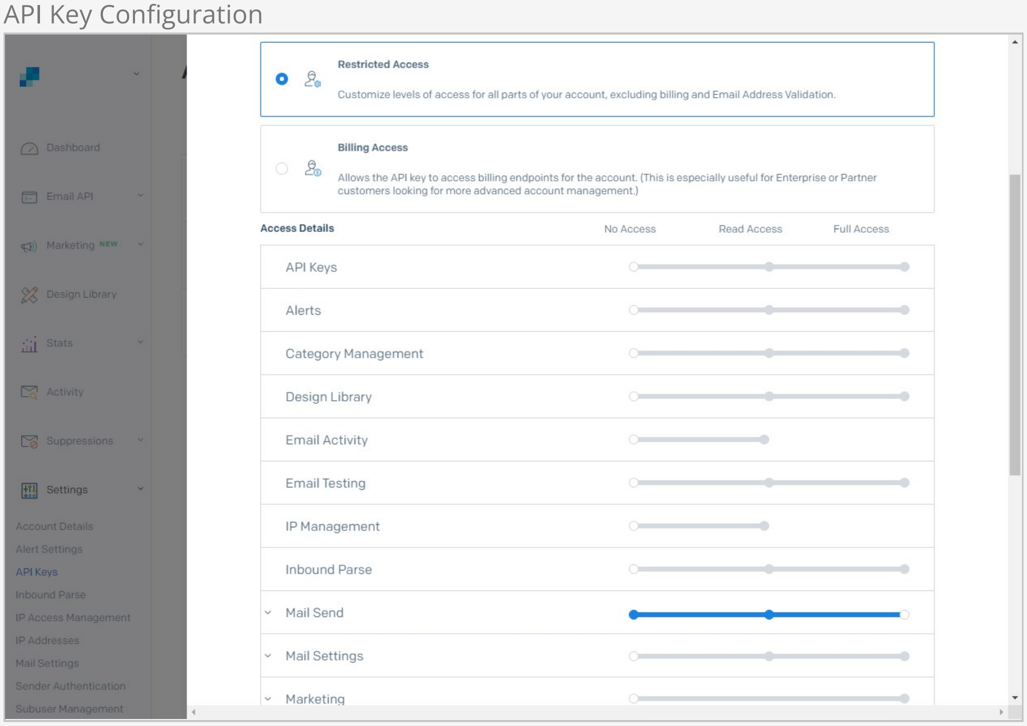
The first step will be getting your API Key. Log in to your SendGrid account and navigate to `Settings > API Keys`. Click the button for `Create API Key`.

Create API Key



We recommend giving *Restricted Access* permission. Also, make sure *Mail Send* is assigned full access as pictured below.

API Key Configuration

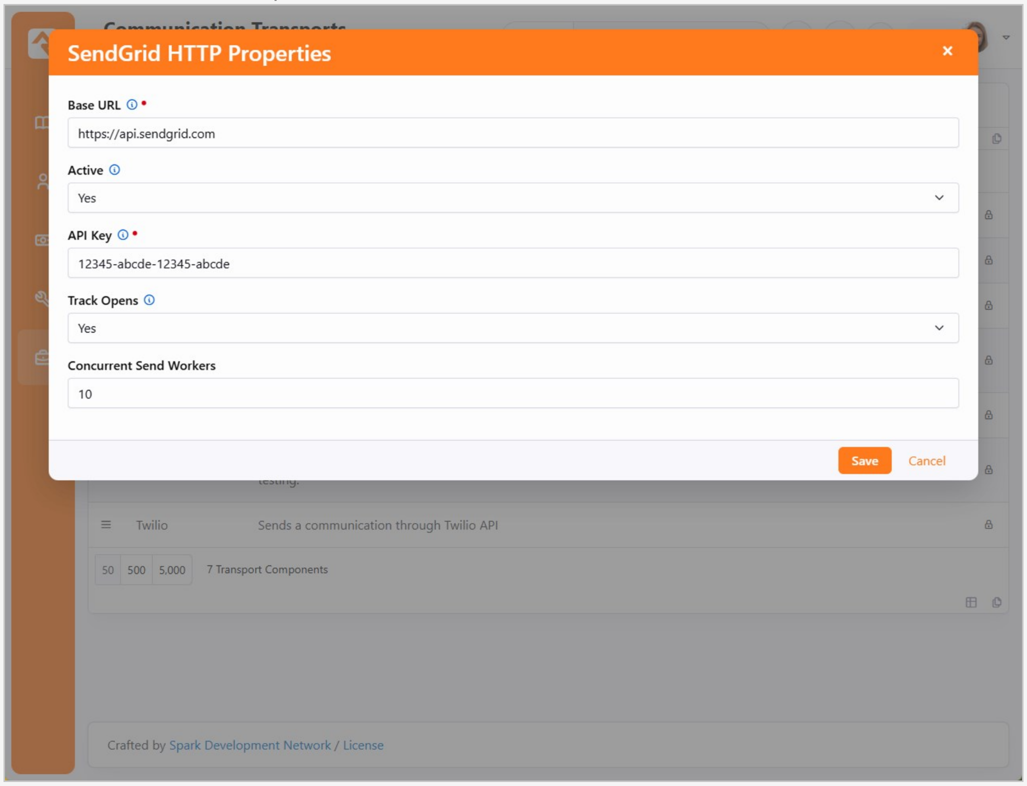


Be sure to copy the API key when it is presented to you. SendGrid warns that you won't see it again, and that's true. If you lose the key, you'll have to create a new one.

Once you've got your API key, you'll need to add it to Rock. Inside Rock, navigate to `Admin`

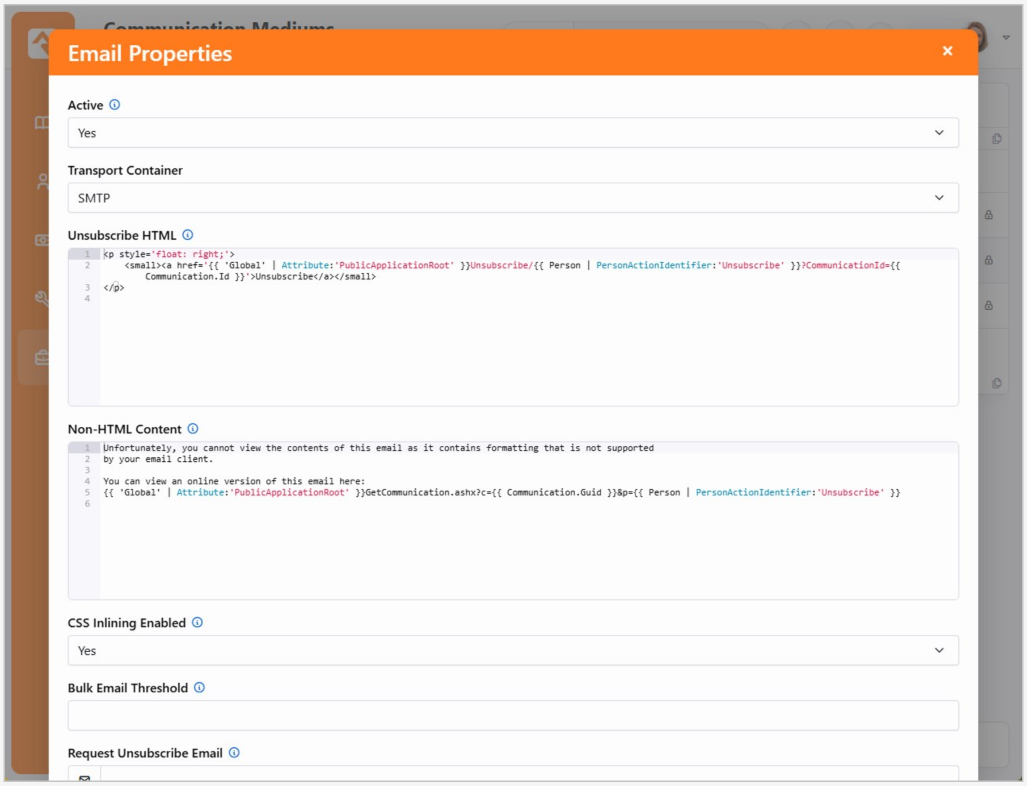
`Tools > Settings > Communication Transport > SendGrid HTTP` and add the *Base URL* and your *API Key* as pictured below.

Communication Transport



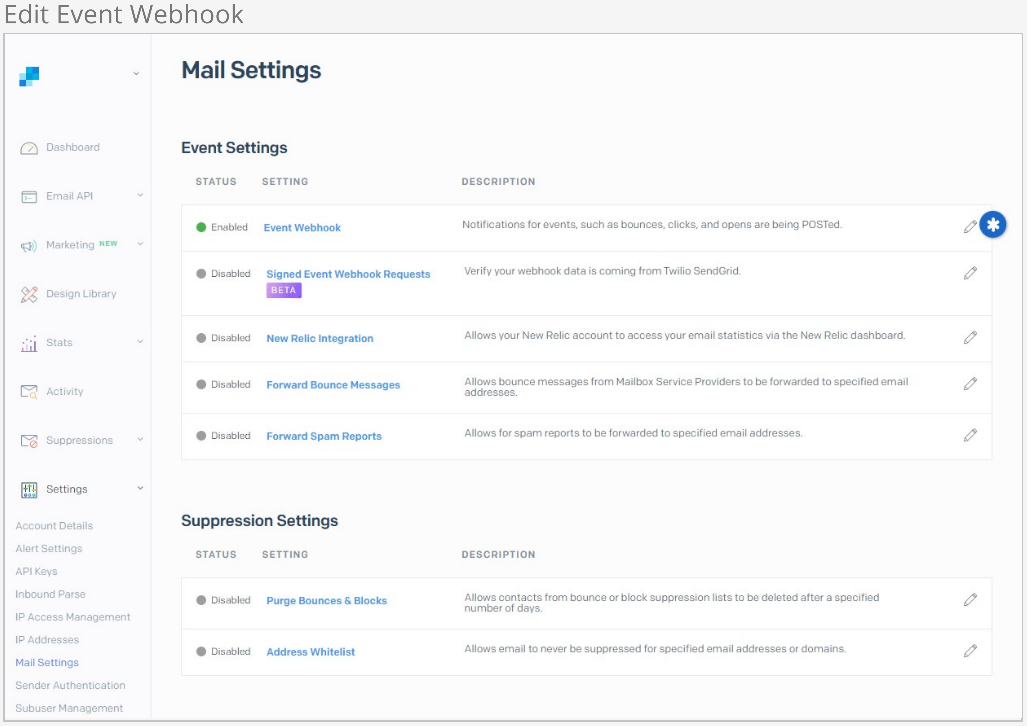
Next, you'll need to update the Communication Medium configuration in Rock. Navigate to `Admin Tools > Settings > Communication Mediums` and access the *Email* entry. Change the *Transport Container* to the *SendGrid HTTP* transport configured in the prior step.

Communication Medium



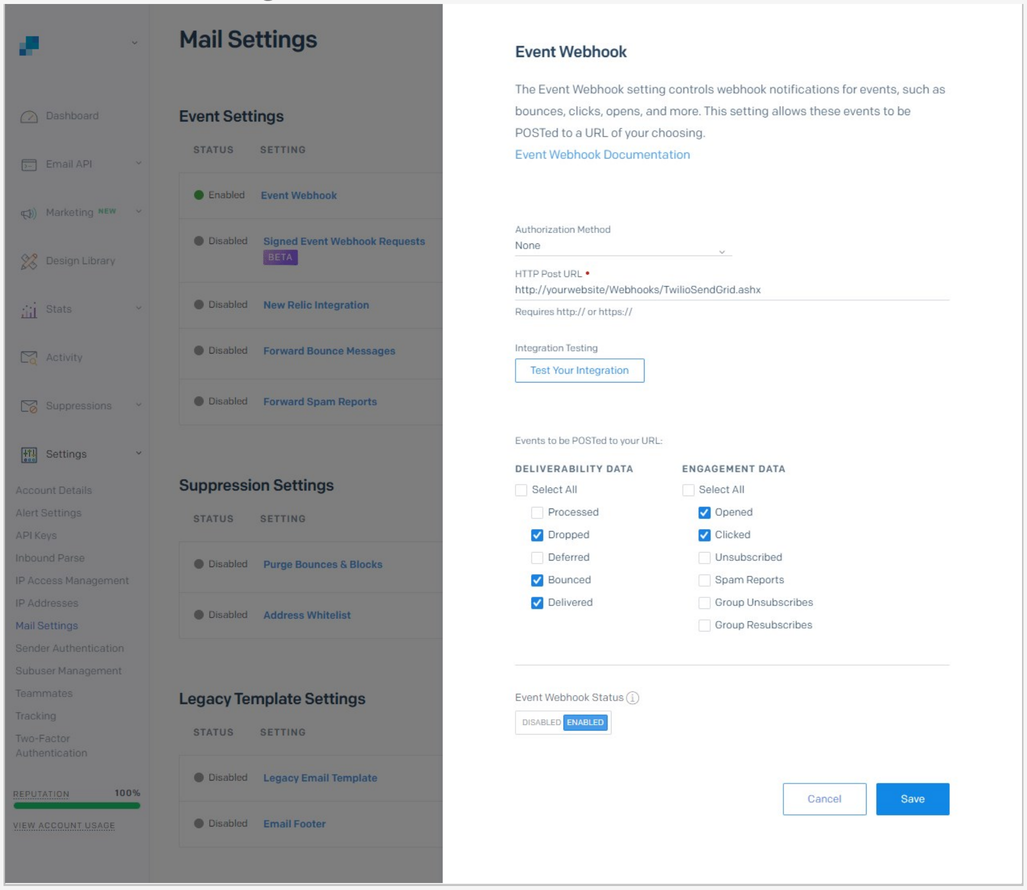
With the above configuration in place, head back over to SendGrid to set up the *Event Webhook*. You can access this in SendGrid under `Settings > Mail Settings > Event Settings`. Click the pencil icon for the *Event Webhook* row to access its settings.

Edit Event Webhook



The *Event Webhook* settings in SendGrid will look like those pictured below. The *HTTP Post URL* will be formatted as shown, with your Rock URL followed by `Webhooks/TwilioSendGrid.ashx`. Twilio owns SendGrid, so don't be concerned about the Twilio part of the webhook.

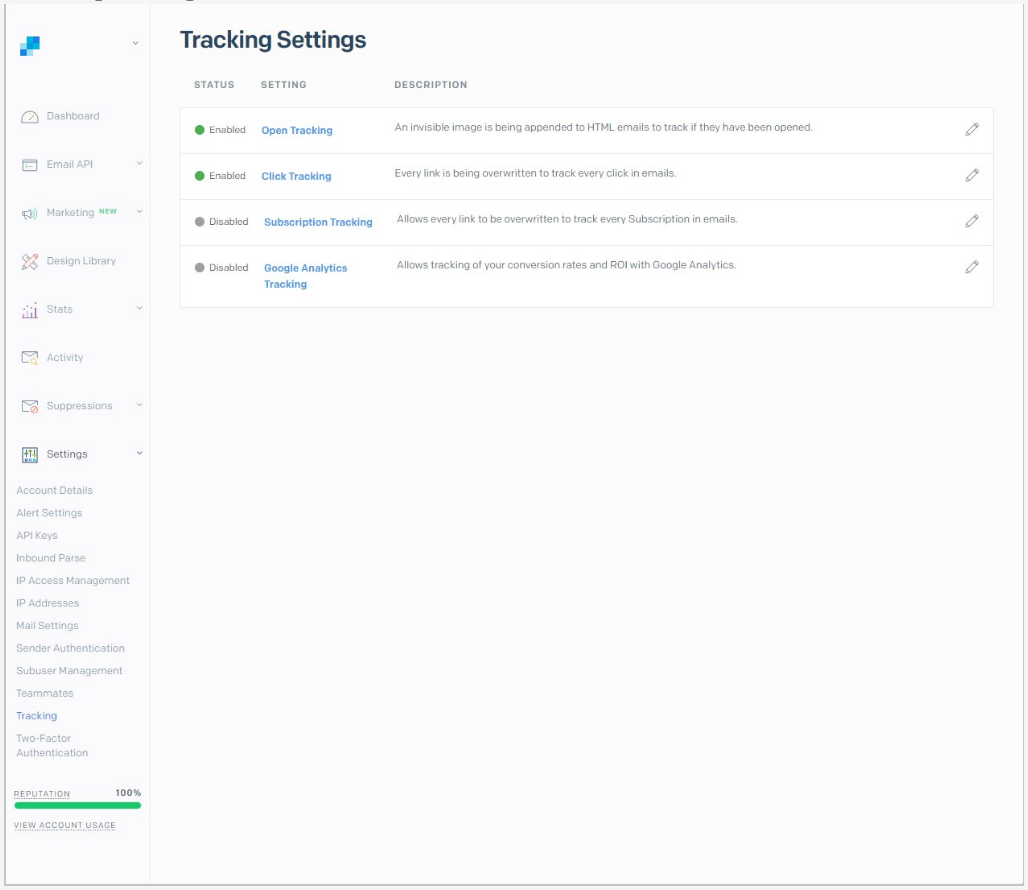
Event Webhook Configuration



Note that *Processed* and *Deferred* currently have no functionality in Rock and can be left disabled. Be sure that the *Event Webhook Status* is set to *Enabled* before saving.

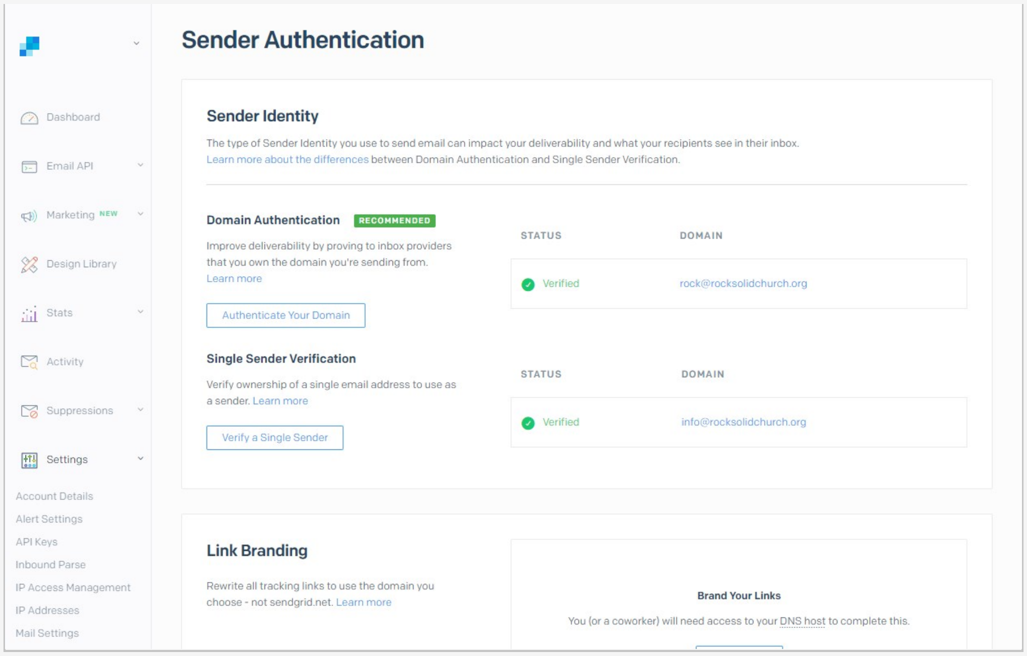
To track opens and clicks, you'll want to enable those Tracking options in SendGrid. Under *Settings* click on *Tracking* to enable these options by clicking the pencil icon. The example below shows what the page will look like after open and click tracking have been enabled.

Tracking Settings



Lastly, add your information to the *Sender Authentication* settings. This helps with deliverability. An example of the setup is pictured below, but if you’re not sure what you need there’s a helpful link at the top of page.

Sender Authentication



Don’t be discouraged if your emails aren’t popping into inboxes right away. There are a variety of factors that can cause delays ranging from a few minutes to several hours. You can click on the *Activity* menu item in SendGrid to search for emails you’ve sent and view details on what may be holding them up. Be patient, because sometimes there’s a delay between sending an email and seeing it in the *Activity* list.

Email Spam Reporting

When you send an email, the recipient can report the email as spam. When this happens, Mailgun and SendGrid can report it back to Rock through their APIs. Rock will then find the person and inactivate their email address in the system and add a note to their record. The note indicates that the email address was deactivated due to a spam complaint and includes the date of the complaint.

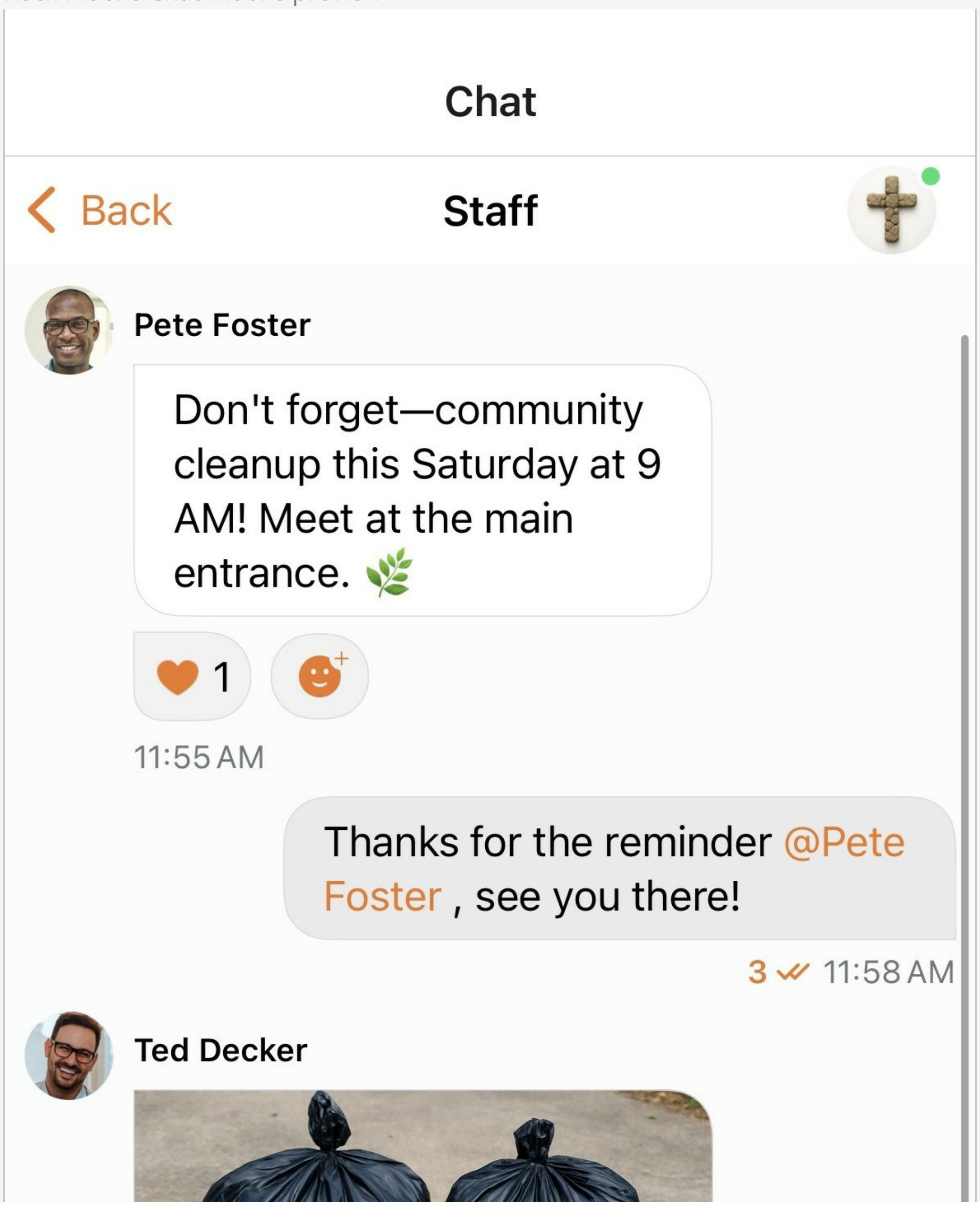
In order for this to happen, in Mailgun you would need to set up a webhook of type *Spam Complaints*. In SendGrid you'll want to update the *Event Webhook* to include "Spam Reports" under Engagement Data.

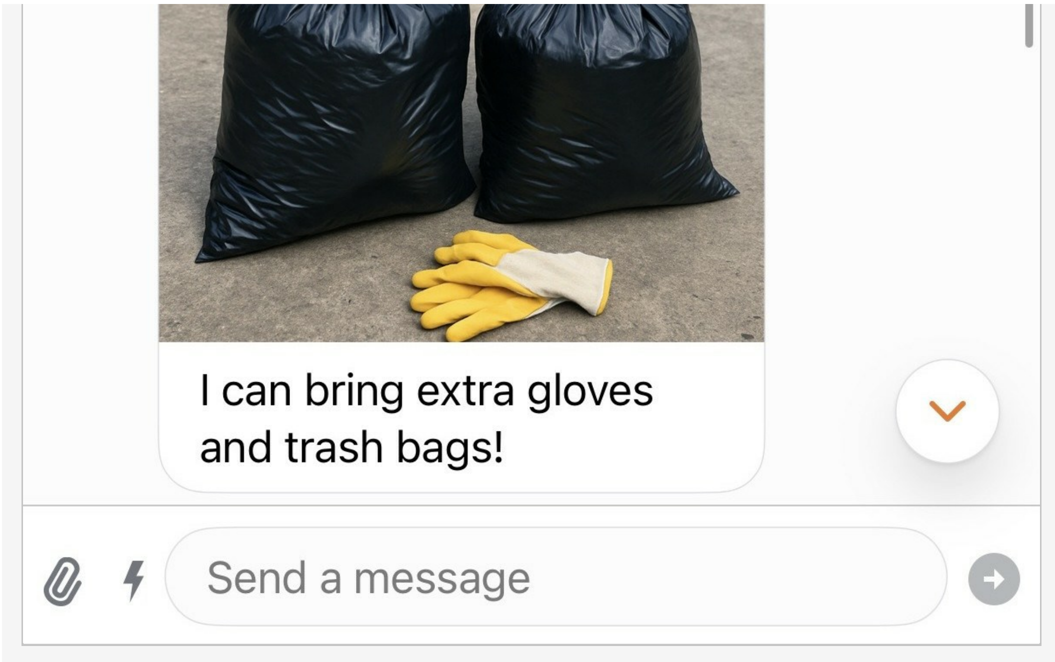
Check out the Unsubscribing section of the Configuring Email chapter above to see how Rock can help your emails avoid being reported as spam.

Rock Chat (Mobile)

Rock Mobile Chat opens the door to an exciting new communication experience for attendees and staff powered by Rock Mobile. Communicate in real-time with your whole organization or chat with a smaller team, or any group you're a part of, all in Rock.

Rock Mobile Chat mobile preview





Requirements for Rock Mobile Chat

To use Rock Mobile Chat you must have a Rock Mobile app and sign-up for the Rock Mobile Chat add-on.

Chat Web-Version

Rock Chat can also be used on your *web-instance*, and although it is ready for use, we recommend you limit its use to Administrators and Staff until it reaches feature parity with our mobile chat.

Data Privacy in Chat

While Rock Chat is secure and designed for everyday use, no chat system is immune from data incidents such as breaches or unauthorized access. For this reason, you should avoid sharing sensitive information (for example, financial data, health records or passwords) in chat messages. Any sensitive data sent is at your own risk and liability for such data remains with the sender.

Rock chat has extensive features such as:

- Real-time messaging with typing indicators and read receipts
- Support for threads, reactions, and media attachments
- Direct messages and group chats tied to Rock group data
- Push notifications

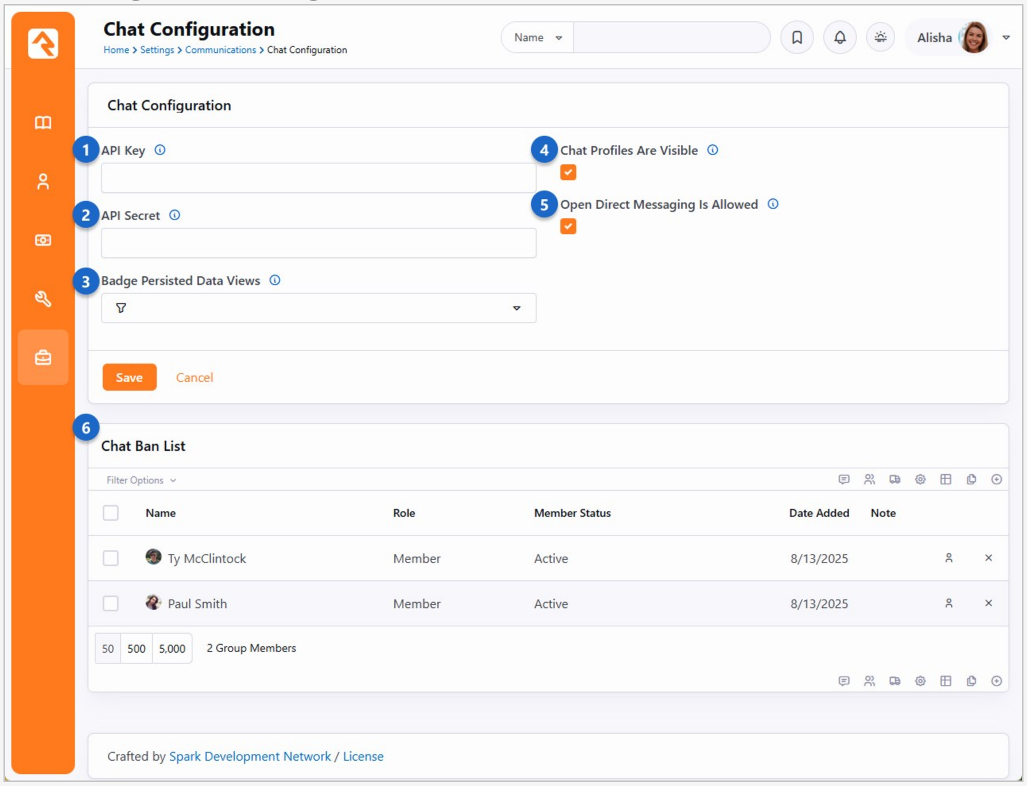
Although we use Getstream for chat, you will not need to interact with it to use chat. As you configure your chat groups through Rock, the information is passed immediately to

Getstream through our API. Just get to messaging and let us handle the hard work.

Configure Chat

To start configuring Chat, you will need an *API Key*. You can sign-up for Rock Chat through the Rock Mobile Chat add-on. Our Mobile team will send you your chat key and API Secret. Once you have these, navigate to `Admin Tools > Settings > Chat Configuration`.

Chat Configuration settings



1. **API Key**
   Insert the API key you receive once you sign up for the Rock Mobile Chat add-on.

2. **API Secret**
   The secret string of characters that acts like a password for your API connection.

3. **Badge Persisted Data Views**
   Select the data views that determine which badges appear in Rock Chat. If the user falls in one of the data views, you will see a badge with the data view highlight color.

4. **Chat Profiles Are Visible**
   Enable to show Rock profiles in search when creating a new direct message. Can be overridden per user.

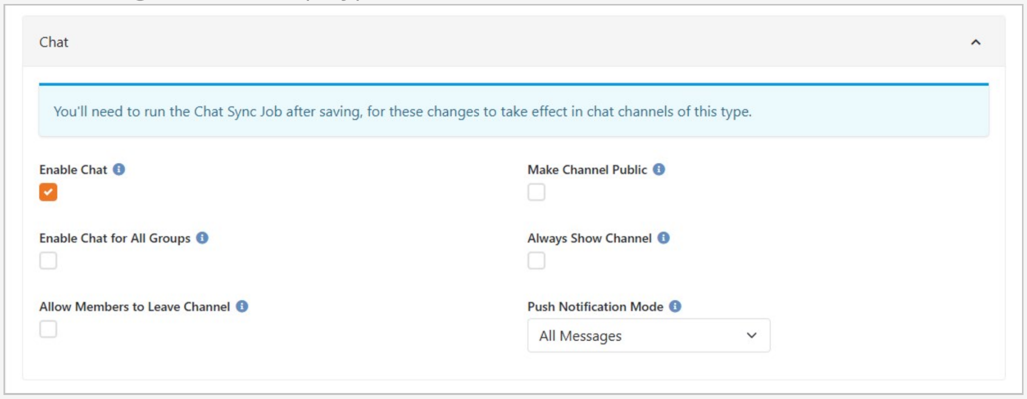
5. **Open Direct Messaging Is Allowed**
   Enable to allow users to receive direct messages from anyone. You will have the option to press someone's profile picture and message them.

6. **Chat Ban List**
   Add users to prevent them from using Rock Chat. This is managed through a Rock group behind the scenes.

Once you click `Save` with a proper API key, you are ready to configure your *chat channels*. Your chat channel types will sync with our chat provider (Getstream) immediately.

To make *chat channels*, start with enabling *chat* at the Group Type level. Navigate to `Admin Tools > Settings > Group Types` and select the group type you want to configure. You will notice a new *Chat* tab.

Chat settings at the Group Type level



- **Enable Chat** – Allow groups using this group type to access Rock Chat.
- **Make Channel Public** – Enable to let any user find and join the channel via search.
- **Enable Chat for All Groups** – If enabled, all groups of this type will have chat enabled by default.
- **Always Show Channel** – Enable to display the channel in the list for all users, allowing anyone to join.
- **Allow Members to Leave Channel** – If enabled, users can leave groups of this type. Generally, this setting should be enabled only for shared channels users may want to opt out of such as a “General” chat since leaving a channel means leaving the group in Rock itself!
- **Push Notification Mode** – Control how Push Notifications are sent to chat channels of this type.

Choose how notifications are sent for chat channels of this type:

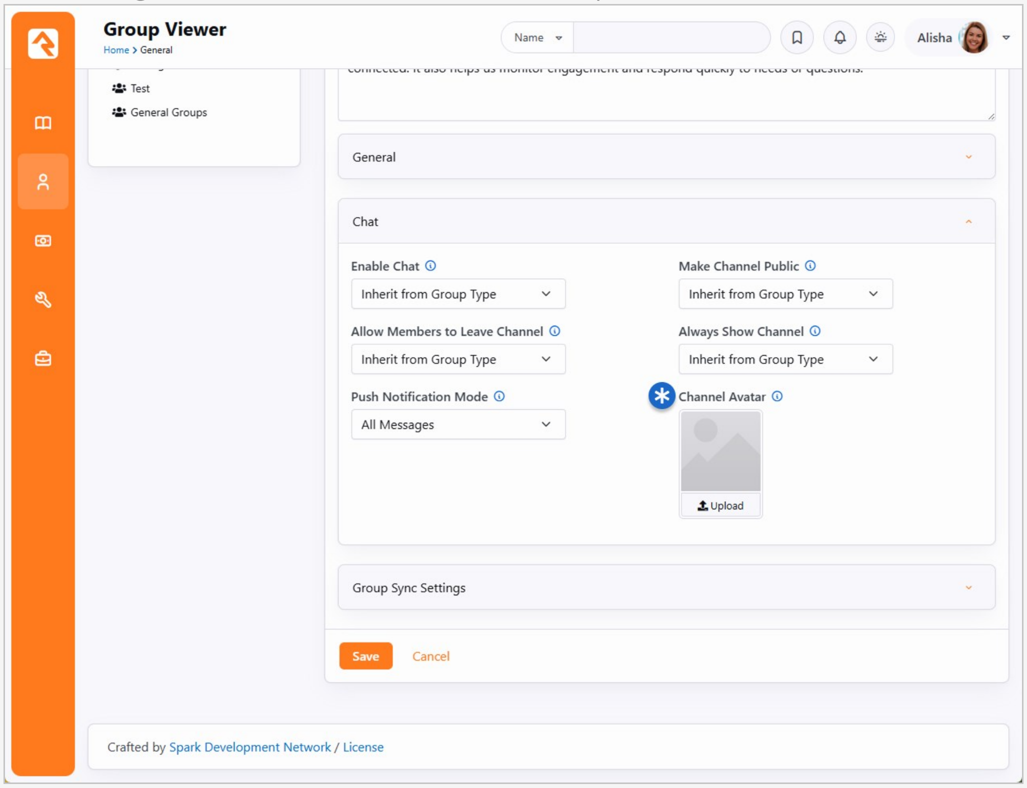
- *All Messages* – Receive alerts for every message.
- *Mentions* – Notify only when directly mentioned in a message.
- *Silent* – No notifications.

> **Cap on Group Types**
> You can only configure 50 group types to be chat channels.

With a *Group Type* enabled for chat, we will move to configuring individual *groups*.

Navigate to `People > Group Viewer` and select a group to specify the settings for its chat channel. You will notice the settings look similar to the *Group Type* settings.

Chat settings inherited or overridden at the Group level



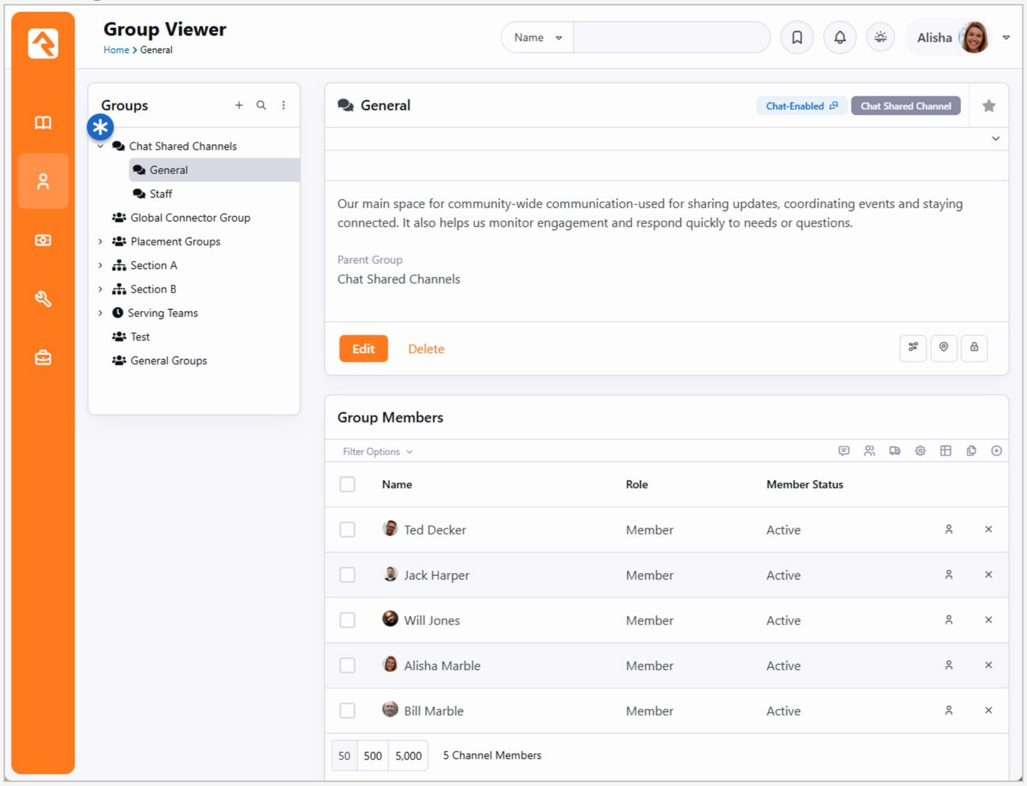
For most chat-enabled groups, you'll want to inherit settings from the *Group Type*. But there are times when going custom makes sense:

- **Privacy matters.** Some groups may need tighter control than the type allows. For example, a *Finance* team might need a private channel, while *Hospitality* can stay public.
- **Not every group needs chat.** Small teams usually benefit from chat, but a short-term class or small task force might not need the distraction.

Picking a fitting Channel Avatar is crucial. Find an image that is recognizable at all sizes and makes sense for the chat theme. For example, your organization's logo makes sense on a "General" chat, but you may want a dollar sign emoji for the Finance team channel. For the best results, keep your image to 120 x 120 pixels. *Don't fret though, you can have a group without an avatar.*

There is a different kind of chat channel we haven't explored yet that is created for large, generally "organization-wide" groups. That group is called a *Shared Channel*, and it was made specifically for large groups. To configure a *Shared Channel*, go to `People > Group Viewer`.

Creating a Chat Shared Channel



Sometimes you need to get the word out to everyone, like announcing that the big event is next week or the annual BBQ is this Sunday. That's where a central, all-church chat shines. Think of it as your digital mountaintop, something like a "General" or "Org-Wide" channel where live announcements reach the masses.

These *Chat Shared Channels* are a special Group Type designed for broad communication. You can configure them just like any other group type.

To create one, click the button, then select `Add Child To Selected`. You'll get a new group that acts as a live chat channel for your whole community.

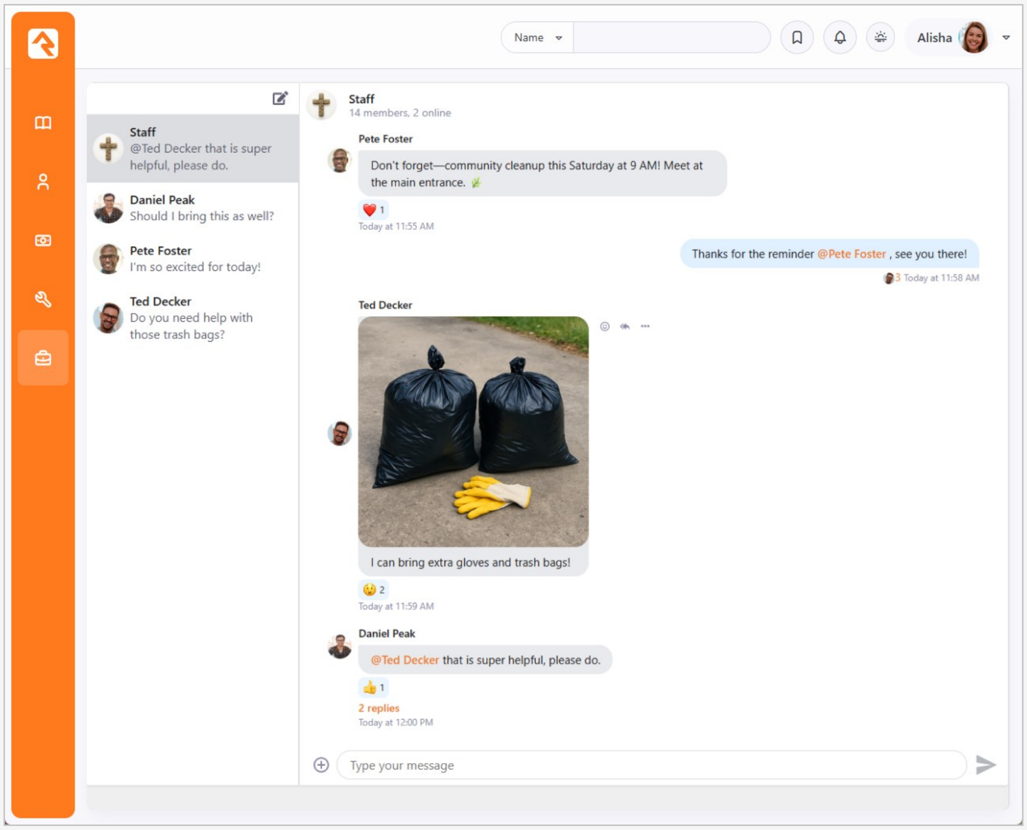
Use Web Chat

> **Caution: For Internal Use Only**
> The Web Chat block should only be used on internal pages for now, in the future as new features and polish come to this block, it will be ready for a wider audience.

Web Chat block

For rock-native chat access, add the "Chat View" block to a page. For more on adding blocks, see the Building and Designing Websites Using Rock guide.

Web Chat block in action



How you can use the web chat block:

- Create an internal "chat" page for staff to communicate.
- Have a bulletin to post important updates.

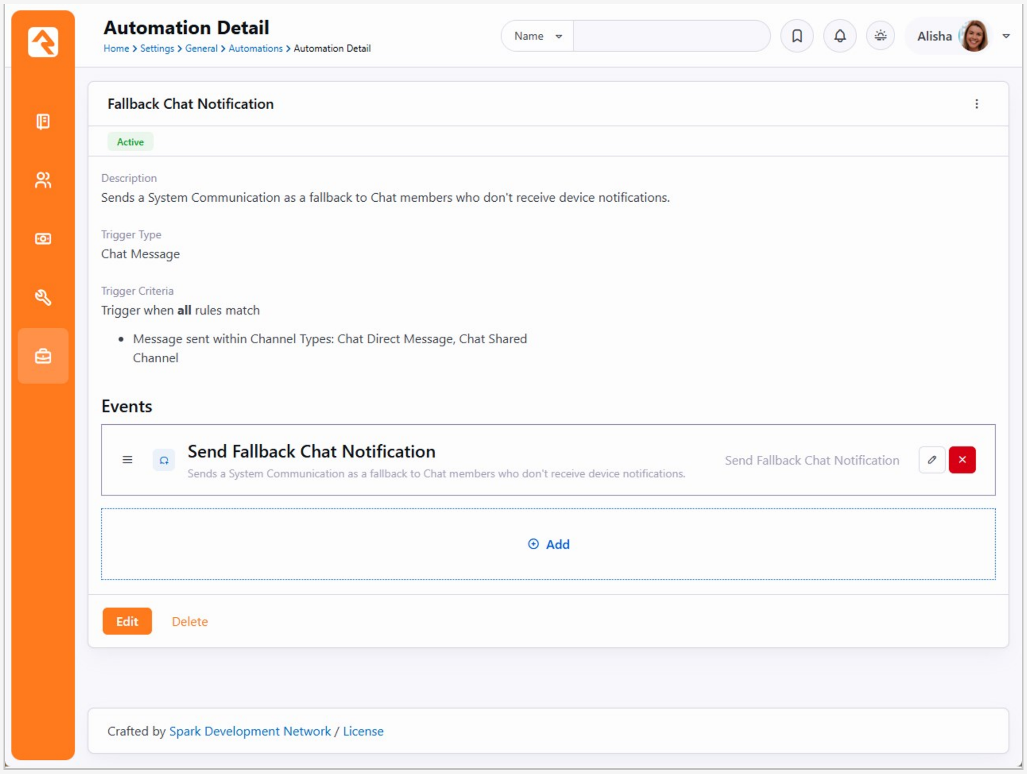
For safety you can configure the minimum age in the Chat block settings, if the person does not have an age entered a verification screen will pop-up.

> **Page Layout for Web Chat**
> Currently, the Web Chat block looks best and scrolls smoothly on the "Full Worksurface" page layout. It functions well on any layout, but looks best when it uses this layout.

Fallback Chat Notifications

With Rock Automations, Fallback Chat Notifications act as your safety net for urgent messages. If someone in a Chat doesn’t have the Rock Mobile app installed—or has notifications turned off—Rock can automatically step in and deliver the message another way. Imagine a notification like, “You have a secured chat message from Ted Decker at Rock Solid Church” arriving by SMS or email, ensuring no one misses a communication.

Automation Detail



Once you have Chat up and running, adding fallback notifications takes just a few minutes.

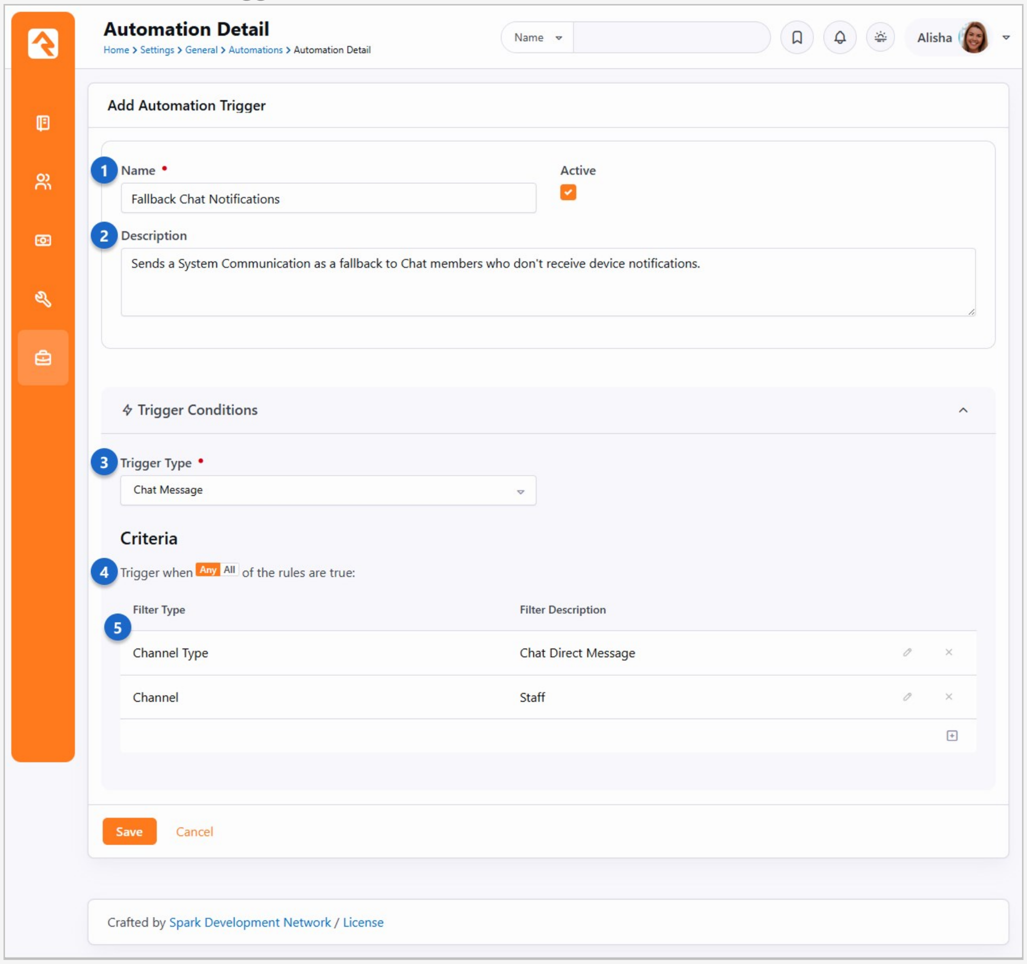
> **Warning**
> To maintain performance and avoid placing unnecessary loads on the Rock server, Fallback Chat notifications will be sent to a maximum of 50 members per Channel. For best performance and responsiveness, keep it to 3–5 members.

Add a Chat Message Trigger

Navigate to `Admin Tools > General > Automations` and click the [+] button to add a new Automation Trigger.

Trigger Properties

Add Automation Trigger



1Name

Give this trigger a name of your choosing (e.g. *Send Fallback Chat Notifications*). You might have a single trigger to handle fallback notifications for all Chat Channels of a given Channel Type, or you can get as granular as you'd like. Your decision here should dictate how you name this trigger.

2Description

Like all things in Rock, make sure to provide a good description! You and your team will thank you later.

3Trigger Type

Choose *Chat Message*

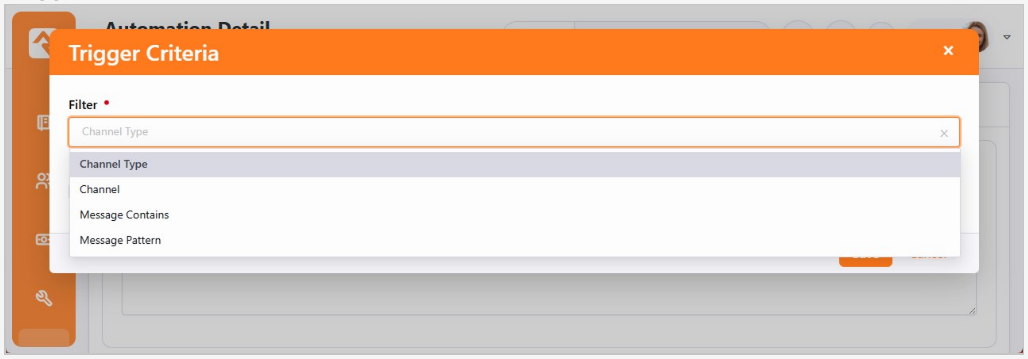
4Trigger when [Any|All] of the rules are true

Should all of the rules be required to match, or should a single rule match be enough to trigger Automation Events?

5Criteria

Add as many criteria rules as you'd like.

Trigger Criteria

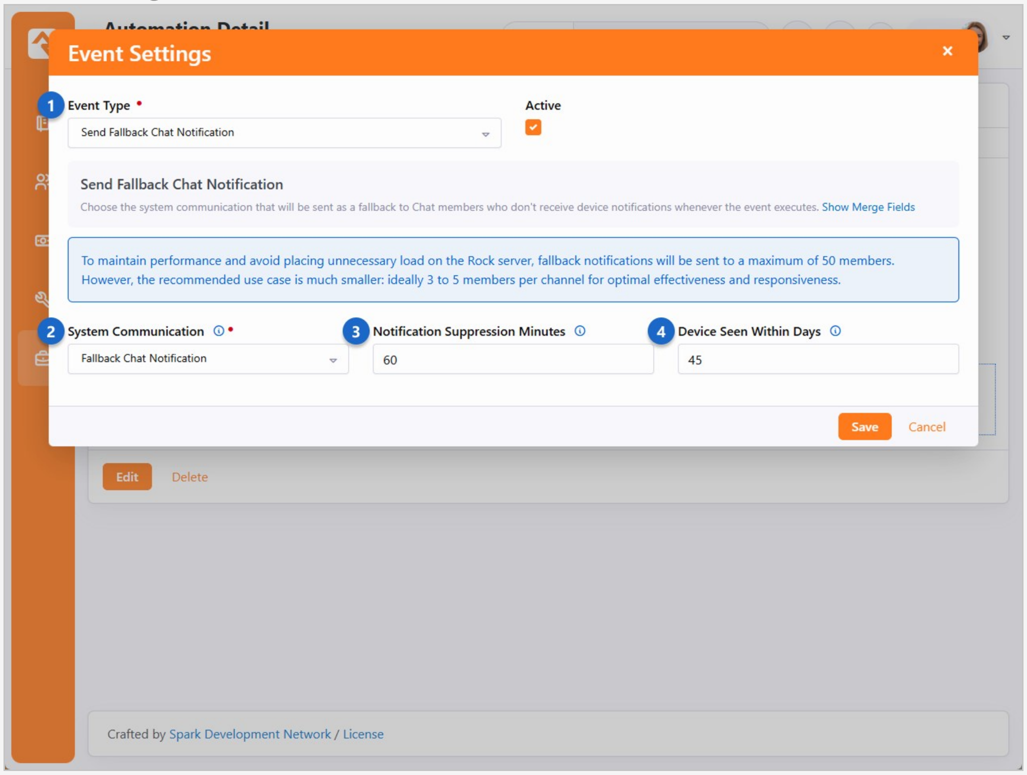


Add a Send Fallback Chat Notification Event

Once you've added your Automation Trigger, you can add as many Automation Events as you'd like to be fired when the trigger criteria are met. In our example, we'll choose the *Send Fallback Chat Notification* event type.

Event Settings

Event Settings

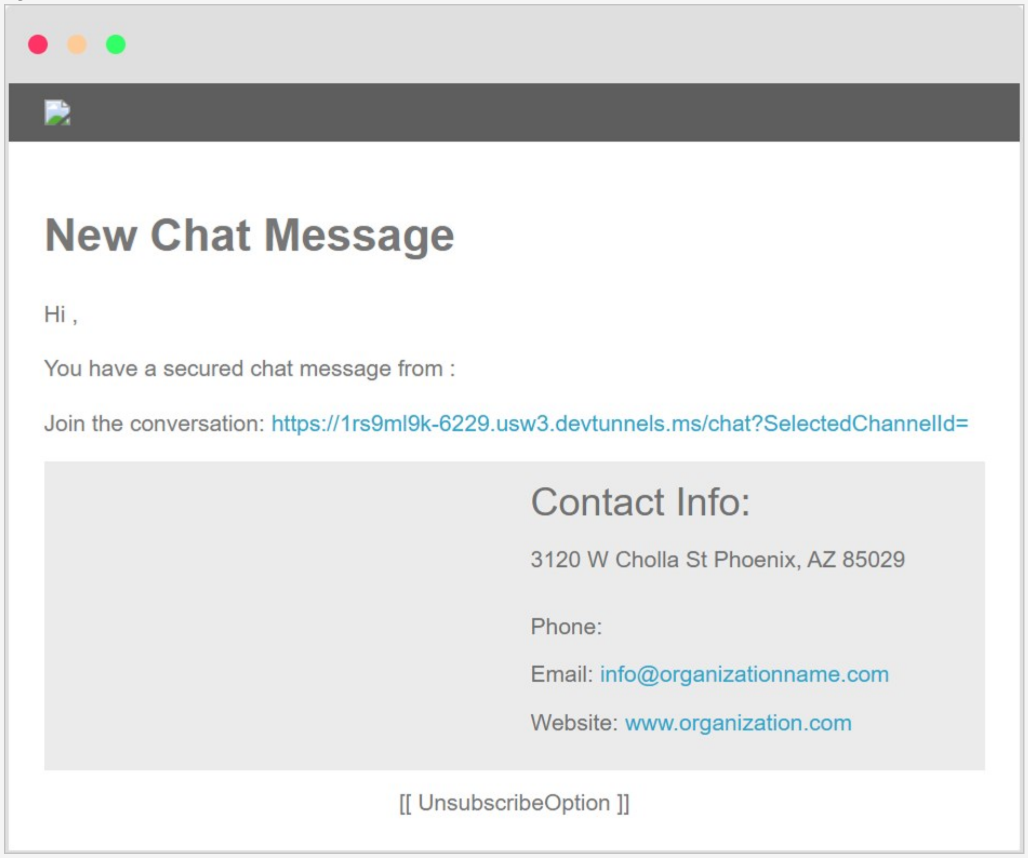


1. **Event Type**
   Choose *Send Fallback Chat Notification*
2. **System Communication**
   The system communication to be sent as a fallback notification. Email and SMS are supported.
3. **Notification Suppression Minutes**
   The number of minutes the system will suppress notifications if the recipient has already received a recent notification.
4. **Device Seen Within Days**
   A Chat member will be excluded from fallback notifications if they have accessed Rock using a personal device within this number of days. Note that the same device must also currently have Rock notifications enabled.

System Communication

We've provided an example Fallback Chat Notification System Communication with both an SMS and email Lava template. You'll find that we've provided plenty of merge fields, including the contents of the chat message that was sent, allowing you to provide as little or as much detail as you'd like in the fallback notification. The ultimate goal should be to bring the individual to the conversation by providing a link to get them there.

System Communication Chat Fallback



Deep Linking to the Rock Mobile Chat Page

Follow the documentation on *Deep Linking* to configure a link to the page within your Rock Mobile App that contains the Chat View block and use that link within your System Communication to bring individuals directly to the app if they already have it installed (but have notifications disabled).

> **Warning**
>
> Mailgun's tracking of links within an email sent by Rock will break *Deep Linking*, and the individual will instead be taken directly to the Deep Link's fallback page. In order to prevent this, add the following attribute to the link within your email's Message Body:
>
> Link Attribute
>
> ```
> {{ chatUrl }}
> ```
>
> It's likely that SendGrid has a similar mechanism to disable tracking.

Linking to the Web Chat View Block

You can also use Rock's Chat View block within a Rock website. Be sure to add this block to a page on your public-facing website and use this as the Fallback Page when setting up your *Deep Link*.