COMMUNICATING
USING ROCK

Welcome

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

Sending a Communication

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

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 new wizard, jump to the Communication Wizard section. If you'd like to learn about how communications work in Rock, read on.

> ### But Wait, I Just Want To Send a Letter!
> "These are great and all, but I need a good old-fashioned low-tech letter. Although I would like to use a fancy merge document and maybe a little Lava..." If this is you, you need to head over to the Admin Hero Guide for more info on Lava and merge docs.

Under the Hood of Communications

Rock's Communication Engine

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

Mediums and Transports

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

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

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

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

Communications Send Job

Usually when you send a communication, it will be sent immediately to a communication queue that gets processed in almost real-time. There is, however, a Rock Job (`Admin Tools > System Settings > Jobs Administration > Send Communications`) that runs every 10 minutes and looks for communications with a pending status. You don't need to worry about this job, but we wanted to point it out so you know more about how communications are sent.

Bounced Mail

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

SMS In Detail

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

SMS Replies

Normally text conversations occur between two phones. With Rock, the conversation actually occurs between the phone and the SMS phone number you configure through your SMS provider (e.g. Twilio). We've worked hard to provide you with advanced tools to be able to dialogue with your audience. Here's how it works.

When you send a SMS message, you select a number to send from. This number is configured to have a *Response Recipient* that will receive all of the responses for the number. When a response is received, the message will be forwarded to the response recipient along with the sender's name and a response code. The response code consists of the @ symbol followed by a three-digit number (e.g. @347). If further follow-up is required, the response recipient can use this code to reply back.

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

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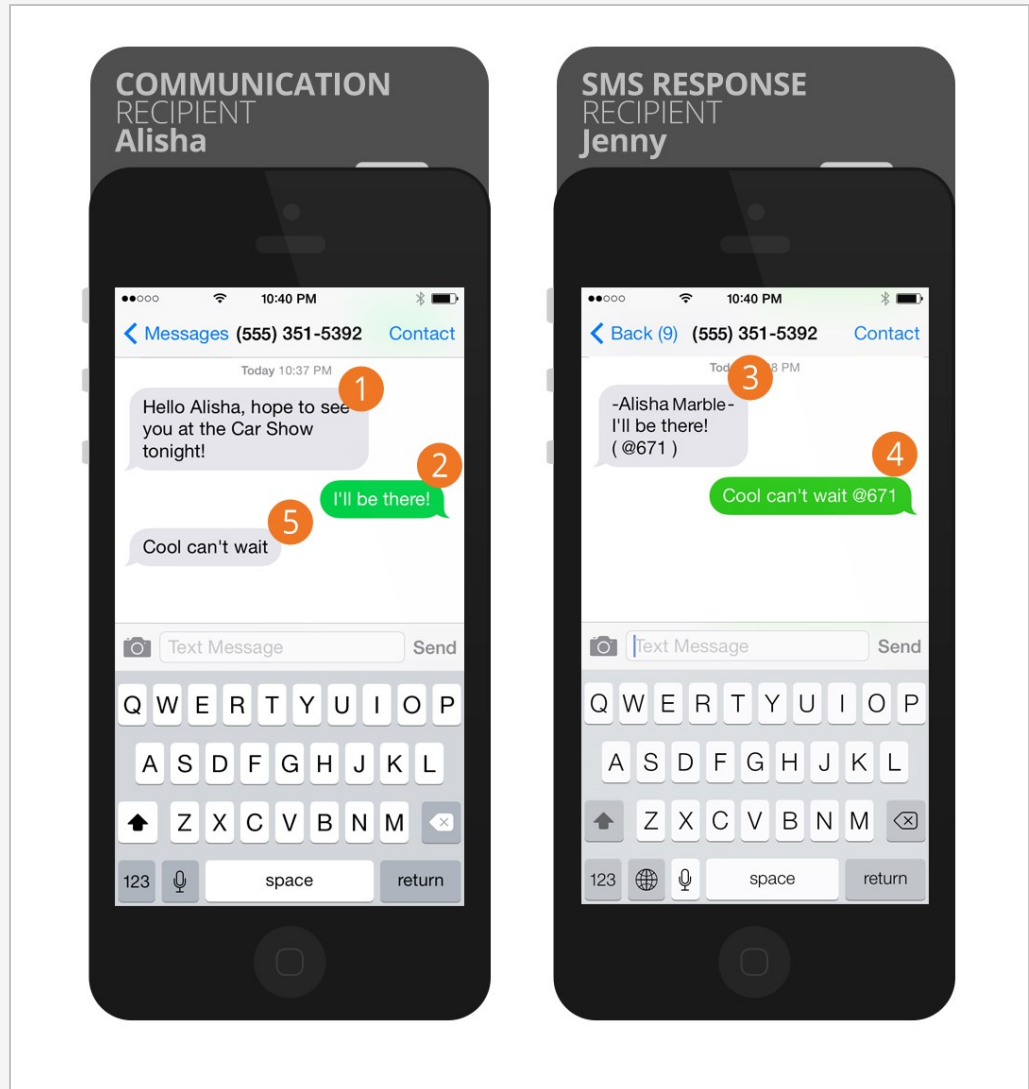
1. The original bulk SMS message. Notice Jenny has cleverly used merge fields to personalize the text message with each recipient's name.

2. Alisha then responds to the message.

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

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

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

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

SMS Number Strategies

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

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 idead to test your communications on various handsets using different file formats and sizes. See what works and what doesn't.

> ### Getting Started With Twilio
> See the integrations section for more information on configuring Twilio as your SMS provider.

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

Long Code Throttling

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

Fear not. We've got you covered. Out of the box, Rock comes configured with Long Code

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

That's the gist of SMS. Now let's take a look at email.

Configuring Email

Out of the box, the email communication medium is configured to use the SMTP transport. You'll want to be sure that your mail server settings are all correctly configured under `Admin Tools > Communications > Communication Transports > SMTP`.

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

> ### Broken Images?
> If you're finding that some of your images appear as broken links in your email be sure that your *Public Application Root* organization setting is set to the proper URL. This can be modified under `Admin Tools > General Settings > Organization Attributes > Public Application Root`.

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

Unsubscribe HTML

If you'd like to change the HTML that is displayed at the bottom of all bulk emails your can do so under `Admin Tools > Communications > Communication Mediums > Email`. The default is to display a small *Unsubscribe* link at the bottom right of the email.

Default Plain-text

If you do not provide a plain-text message the recipient will see a generic message with a link to view the rich text email on your website. The contents of this generic message can be configured under `Admin Tools > Communications > Communication Mediums > Email`. The default message is:

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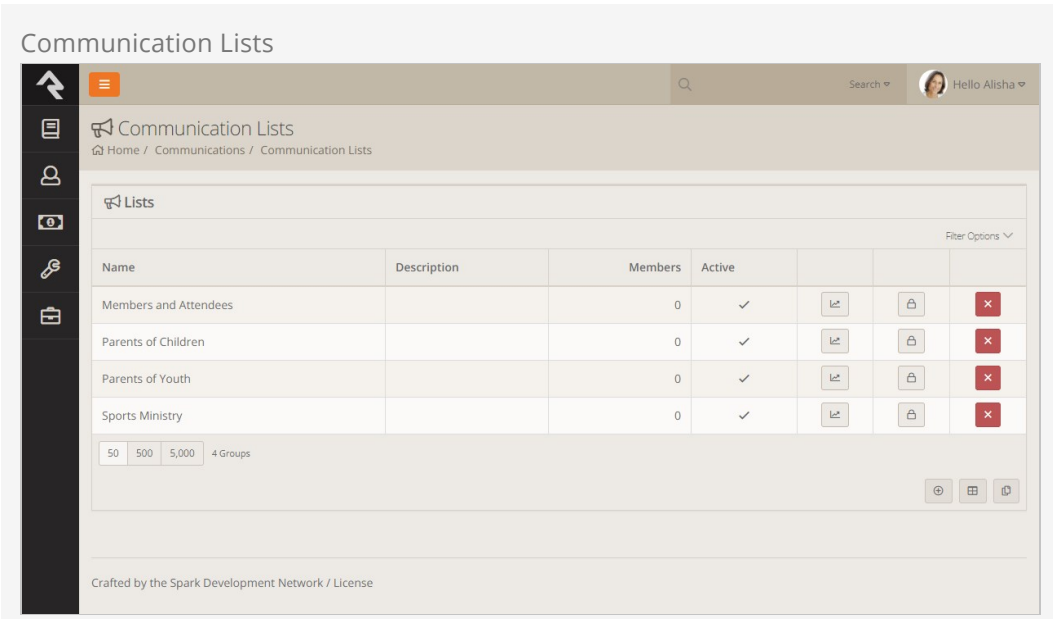
Safe Sender Domains

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

You'll want to add all of your organization's email domains to the *Safe Sender Domains* defined type under `Admin Tools > Communications > Safe Sender Domains`.

Communication Lists

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

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

Rock ships with the following four lists:

- Members and Attendees
- Parents of Children
- Parents of Youth
- Sports Ministry

These lists are just samples to get your juices flowing and so you can see how lists

should be configured. You can use them for your organization if you want, but you'll need to wire them up to sync with your data views. Because these lists are groups, you can add people to them manually...*or* you can use Rocks' group sync features to keep them automatically updated. To learn more, see the Group Sync chapter in the `Rock Your Groups` guide.

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

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

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

Communication List Categories

You can create categories to further identify and filter your communication lists. The *Communication List Categories* page is located at `Admin > Communications`.

Communication List Detail
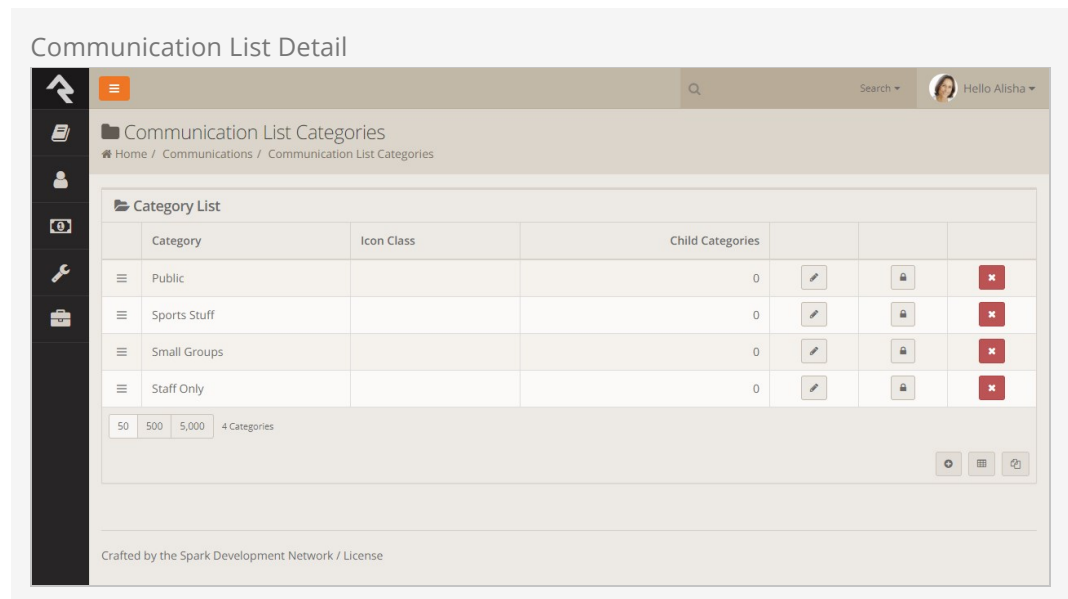
Rock ships with one category, called "Public", but you can create as many categories as you want. For example, you could create a category called "Staff Only" to use when creating communication subscription blocks you want only to be available to staff members. Categories can have child categories as 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.

Segments

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

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

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

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

Communication Wizard

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

Sending a Communication Using the Communication Wizard

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

Recipient Selection
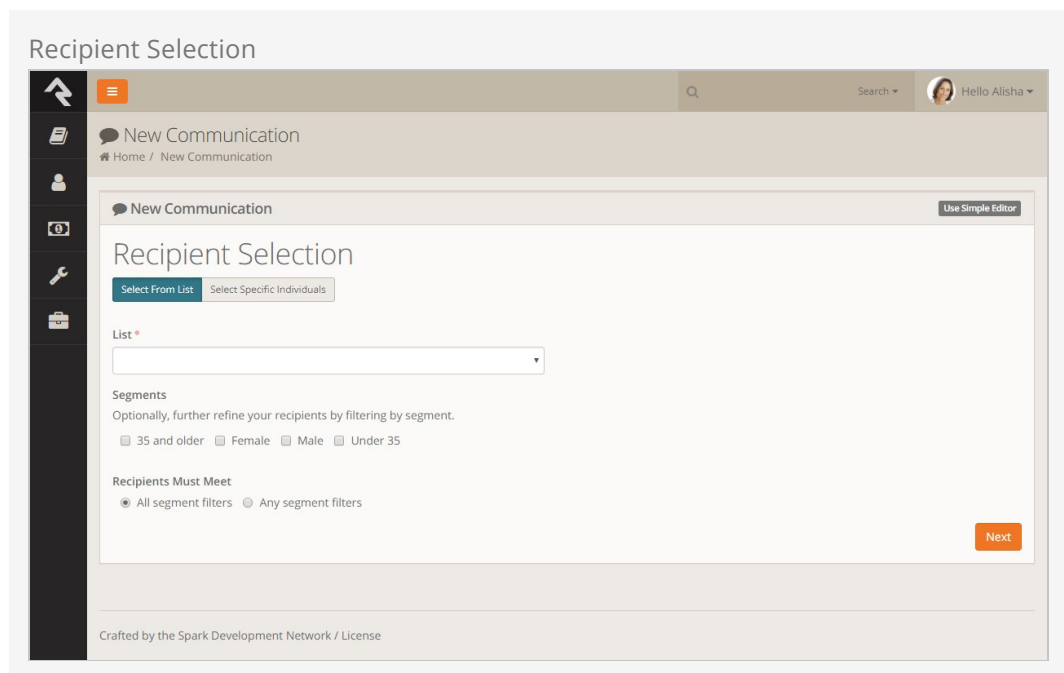
The *Recipient Selection* screen is the first screen of the Communication Wizard. Here you select which communication list you want to send your communication to. If you arrive at this screen from a grid, the *Select Specific Individuals* tab will automatically be selected.

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

Click `Next` to advance to the *Communication Delivery* screen.

> ## Wait! I want to go back!
> If at any point you want to return to a previous screen, click the `Previous` button.

Communication Delivery

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

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

Click `Next` to advance to the *Communication Template* screen.

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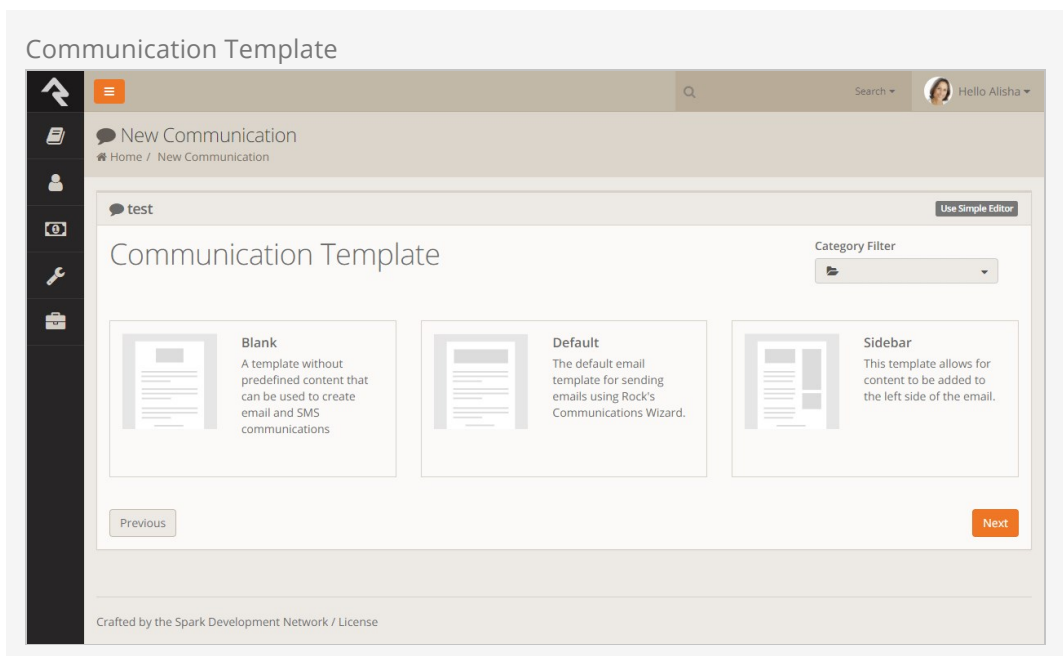
Now it's time to select the template you want to use to create your communication. You can imagine how, after you've created a number of templates, having a *Template Image Preview* (i.e., thumbnail) will help you easily locate the template you want. You can also use the *Category Filter* dropdown to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

After selecting your template, click `Next` to advance to the *Email Summary* screen.
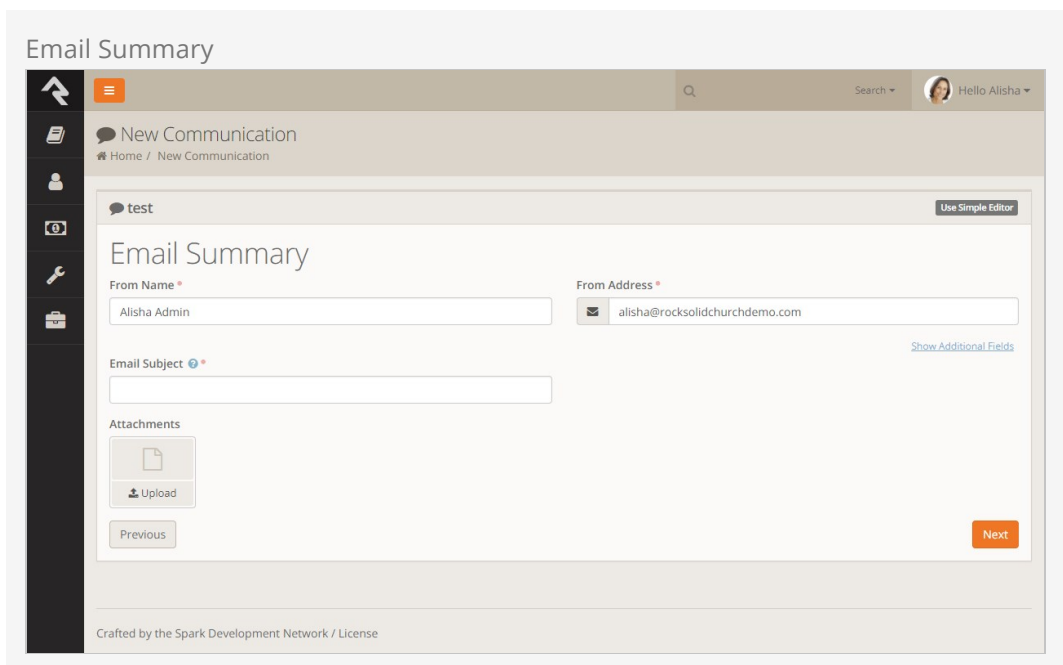
Email Summary

The *Email Summary* screen is where you specify the sender, the sender email address, the subject, and any files you want to attach to the message. Click *Show Additional*

Fields if you want to also specify a reply-to address, CC list, and BCC list.

Click `Next` to advance to the *Email Editor*. (Note: if your communication will be sent by SMS only, the wizard will skip this screen.)
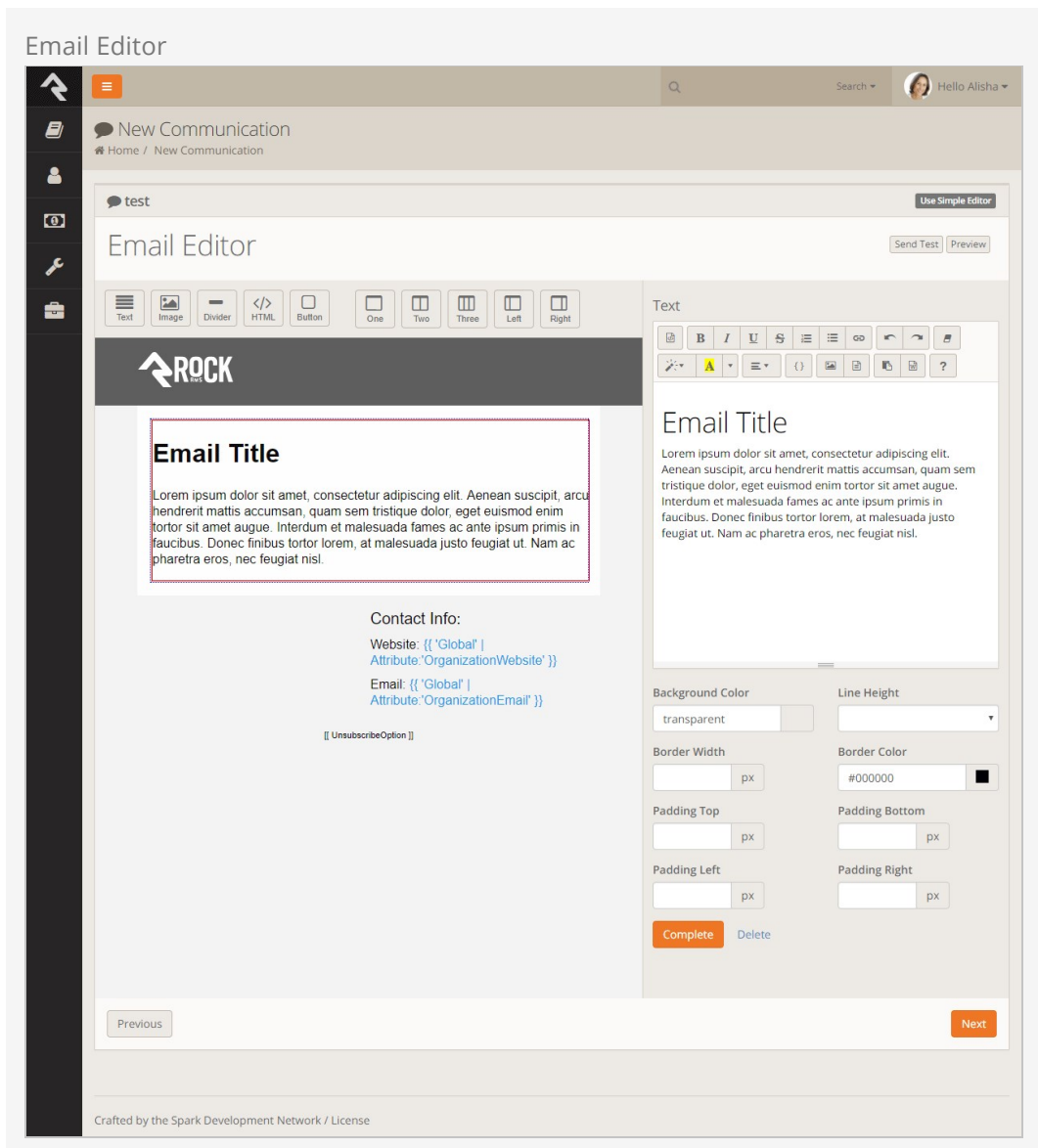
Here's where things get really fun. The *Email Editor* is a drag-and-drop visual email composer. This is where you configure the layout, images, text, buttons, etc., of your communication.

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

After placing an element, you can edit it by clicking on the section it's in. The options associated with that element are displayed on the right side of the screen. Notice that the section you're editing is highlighted with a red border, and you can view your changes in real time. When you're done editing the section, click `Complete`. If you decide

you don't want that element after all, click `Delete`.

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

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

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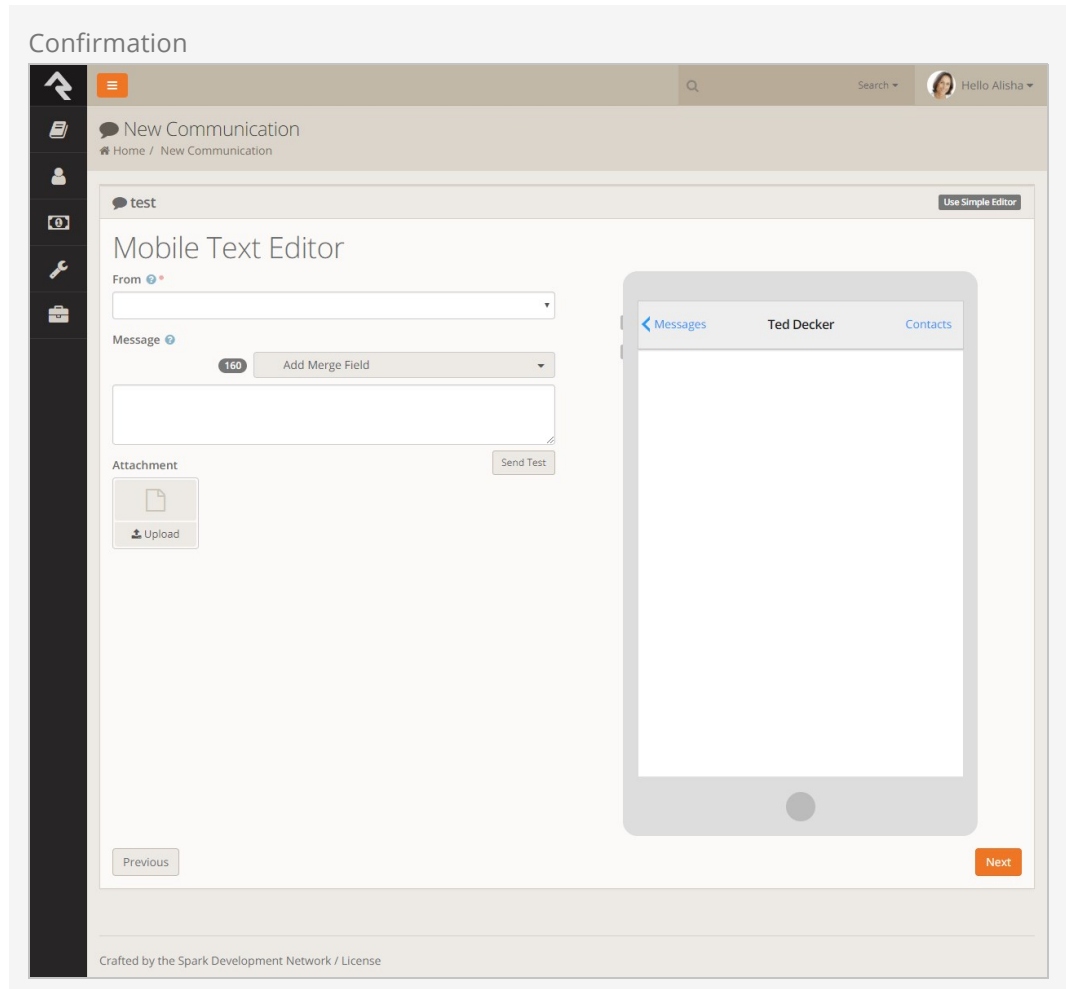
The *Mobile Text Editor* is similar to the *Email Editor*. This is where you design how your SMS message will appear. On the right side of the screen you can see a preview of how your message will look. You can incorporate merge fields and images to personalize and customize your message.

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

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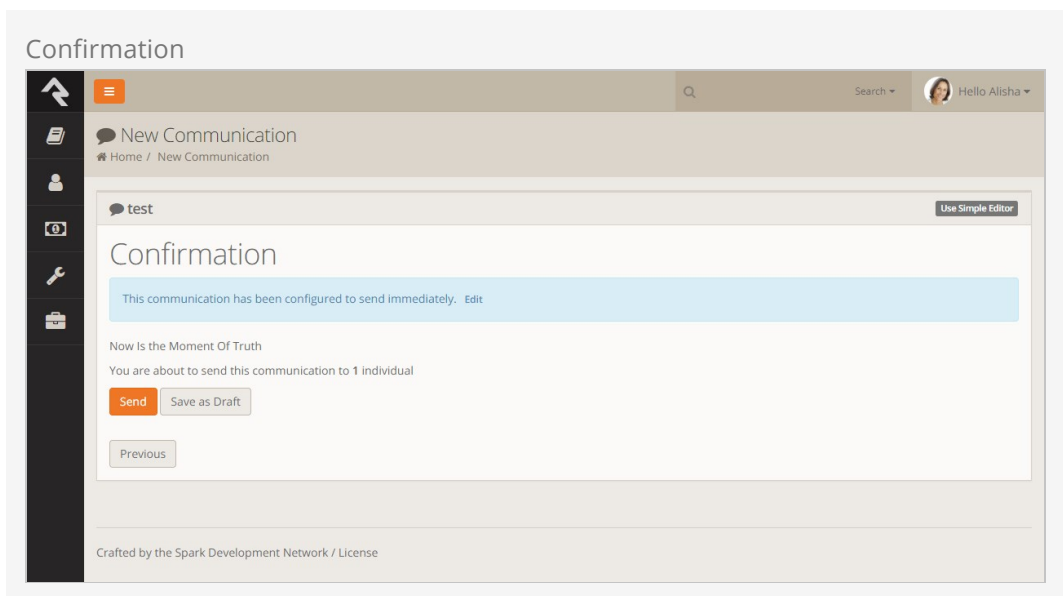
This is the Moment of Truth. Are you ready to send the email? If so, click `Send`. If you're not quite ready, you can save your communication for later by clicking `Save Draft`. Your communication drafts are located in the *Communication History* screen. You also have the option of changing your communication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

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

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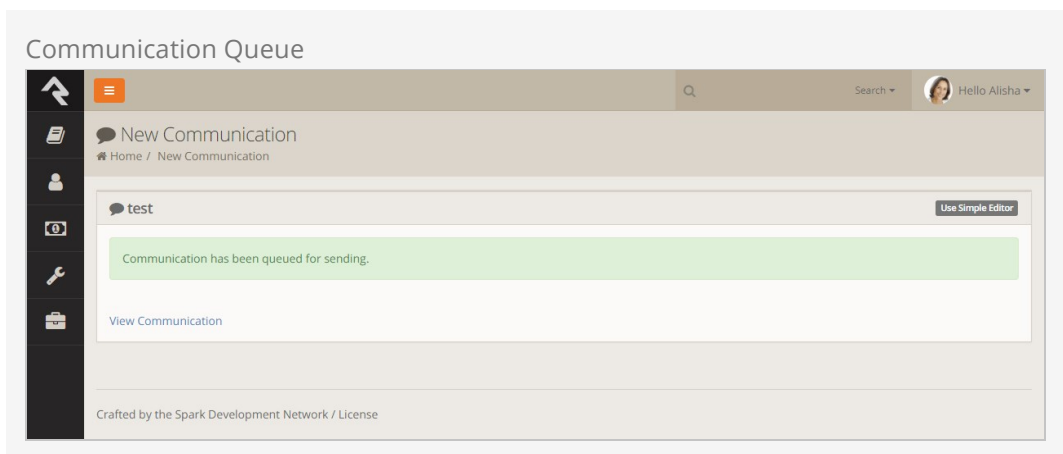
To immediately view the communication's analytics, click the *View Communication* link. See Communication Analytics to learn more.

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

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

Simple Email Editor

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

## Sending a Communication Using the Simple Email Editor

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

> ### Tip: Hide the New Communications Button
> If a person does not have view access to the New Communications page the button at the bottom of the grid will be hidden.

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

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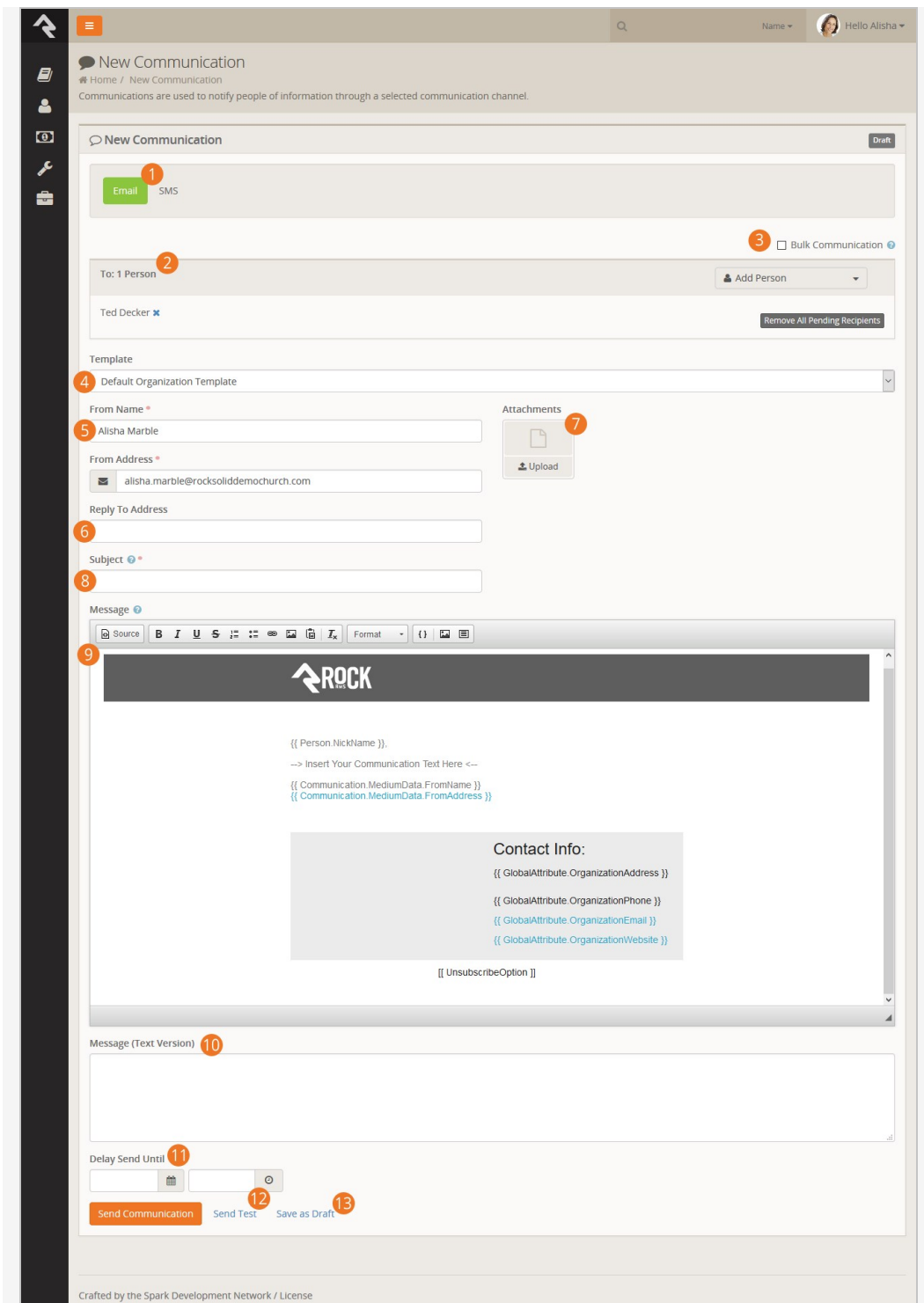
1 Email is the default communication medium, but this can be updated from the communication selector at the top of the page.

2 The recipient list will be filled with all of the people you previously selected as recipients. You can also add and/or remove names from the list at this point. Don't forget that if you started with a blank communication you'll need to enter all of the names manually. You may notice that some names are in red. These names either do not have an email address or have been marked as not wanting emails or bulk emails.

3 Determine if this message should be treated as a bulk email. Bulk emails

will have the unsubscribe link added to them. They will also not be sent to people who have asked that they not receive bulk emails from your organization.

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

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

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

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

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

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

10 For those with text-based mail clients (sigh), you'll want to provide a simple text version of your message. If you don't, they will see a link to a page that displays the HTML version of the message.

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

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

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

Resolving Relative Links

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

Approvals

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

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

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

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

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

Communication Preferences

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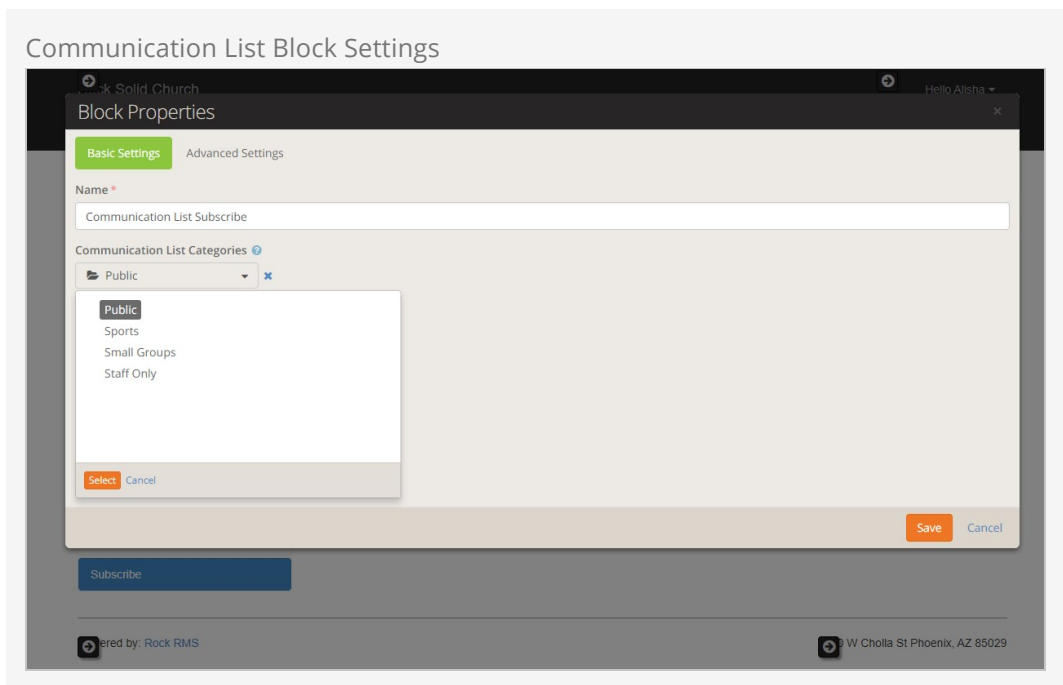
Communication List Subscribe Block

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

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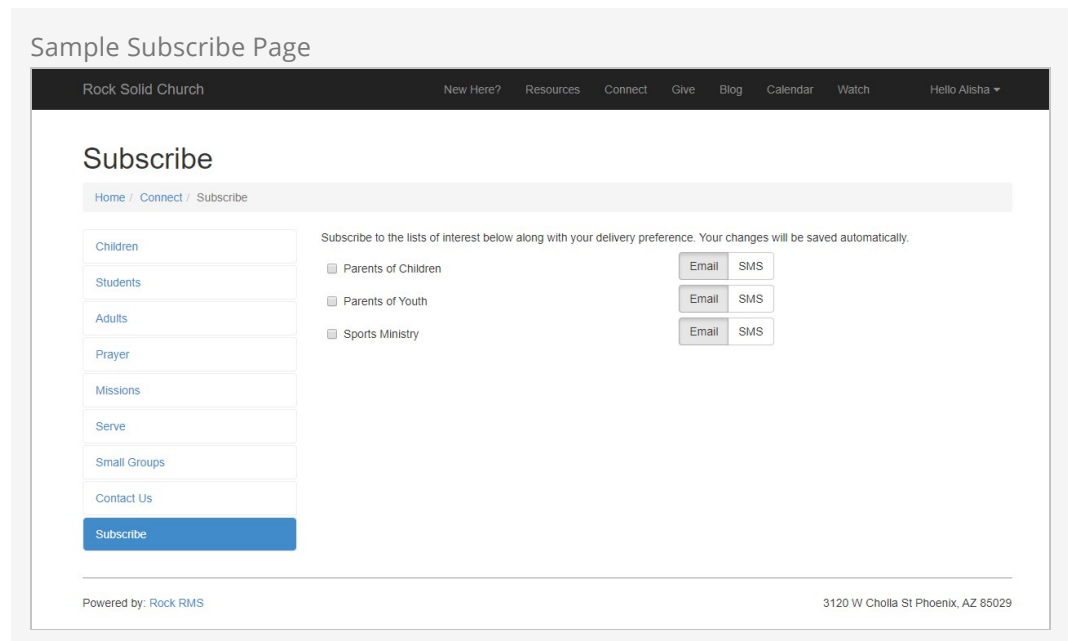
In this example, the block shows the three communication lists that ship with Rock: Parents of Children, Parents of Youth and Sports Ministry. If a person were subscribed to additional lists unique to your organization, they would be displayed here as well.

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

target only a particular segment of the communication lists.

Communication List Block Settings

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

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

Setting Subscription Preferences

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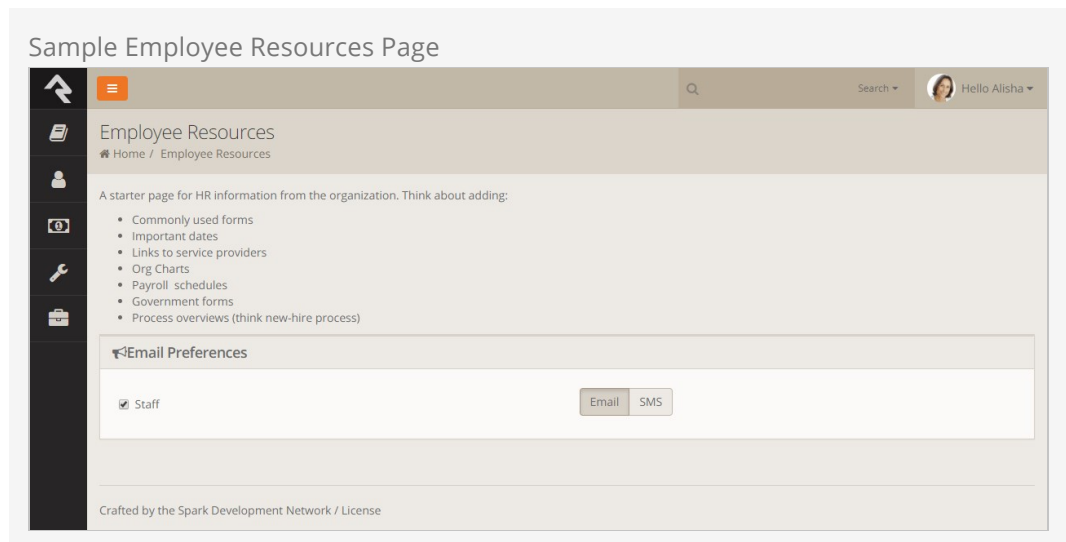
Setting Preferences in a Subscribe Page

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

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

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


Sample Employee Resources Page

Setting Preferences from an Unsubscribe Link

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

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

- When you send a bulk communication using the communication wizard, Rock automatically includes an unsubscribe link in your message, but you can place the unsubscribe link anywhere by using the merge field: [[UnsubscribeOption]].
- If you do not provide this merge field when using the Simple Email Editor, the link will be added for you at the bottom of your email (*evil laugh*).
- You can modify the format and destination of this link on the *Email Medium* `Admin Tools > Communications > Communication Mediums > Email`. If you blank out this field, then no link will be added to your message. Think about it before you simply delete it. Friendly senders should provide a way to opt-out of messages.

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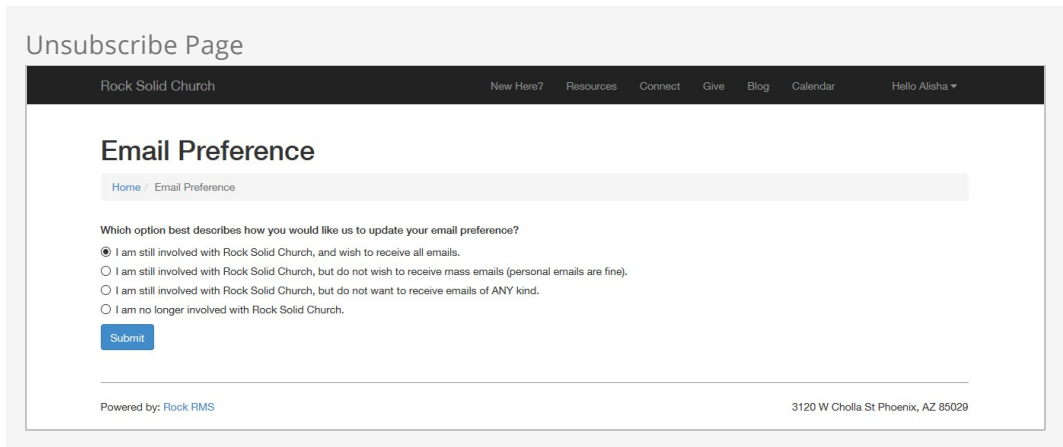
Unsubscribe Page

The unsubscribe block on this page allows you to customize the wording for each of the options on the page. If you want to add more reasons for the "I no longer attend" option, you can do that under `Admin Tools > General Settings > Defined Types > Inactive Record Reason`. The block also allows you to suppress any reasons that might be awkward in this context (e.g. *Deceased*, *No Activity*).

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

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

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

Communication History and Analytics

Viewing Communication History

You can view a history of the communications you've sent under `People > Communication History` . There you will see a list of each communication, which you can filter by type, status and content, etc.

> ### See The Bigger Picture
> Those with *Administrate* permissions on this block will be able to see every communication in the system and have the ability to filter by a specific person.

When you select a communication, Rock displays a page showing the status of the message along with any analytics that are available. This is where using one of the email service integrations like Mailgun can provide a ton of value. With these services you can see how many people have opened your message and even what links they have clicked. This gives you a much broader understanding of how well your message was received and what *calls to action* were engaged. To learn more about Mailgun, see the Integrations chapter below.

Communication Analytics
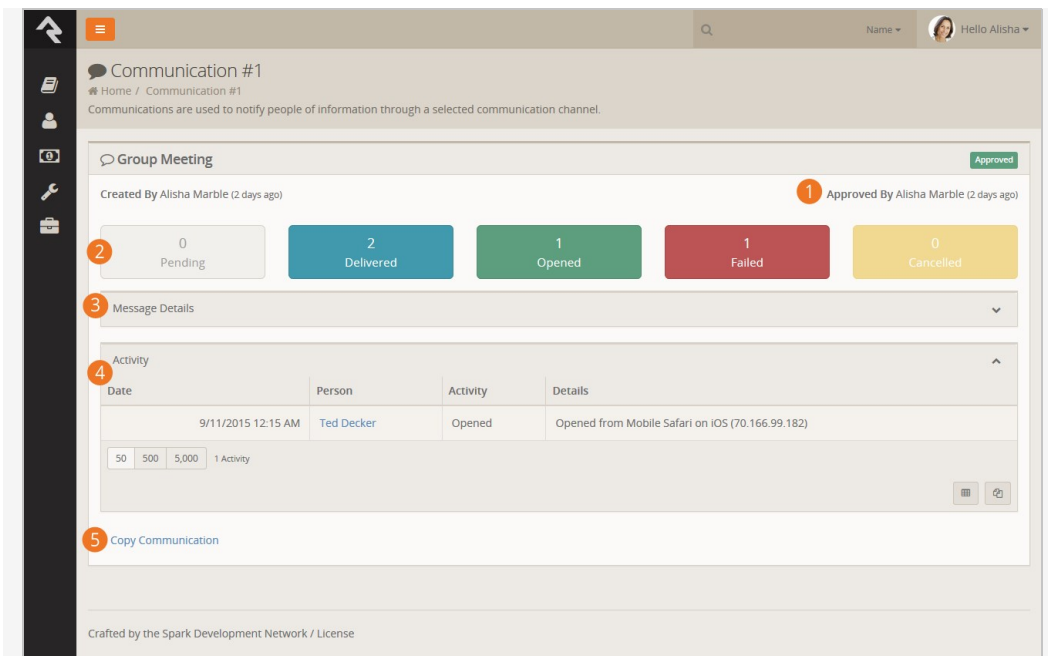
1. Approver

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

2. Status States

Analytics are shown for each state that a message could be in. The number and types of states is dependent on the transport that you used. This screenshot shows the Mailgun transport which supports every possible state. These states include:

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

3. Message Details

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

4. Activity

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

5. Copy Communication

Often times you will want to resend a similar communication. Using the 'Copy Communication' link will create a new communication with the exact settings. It's important to note that the recipient list will be exactly the same. If the initial communication was sent from a dynamic list of people

(like a Data View) it will not re-run the list.
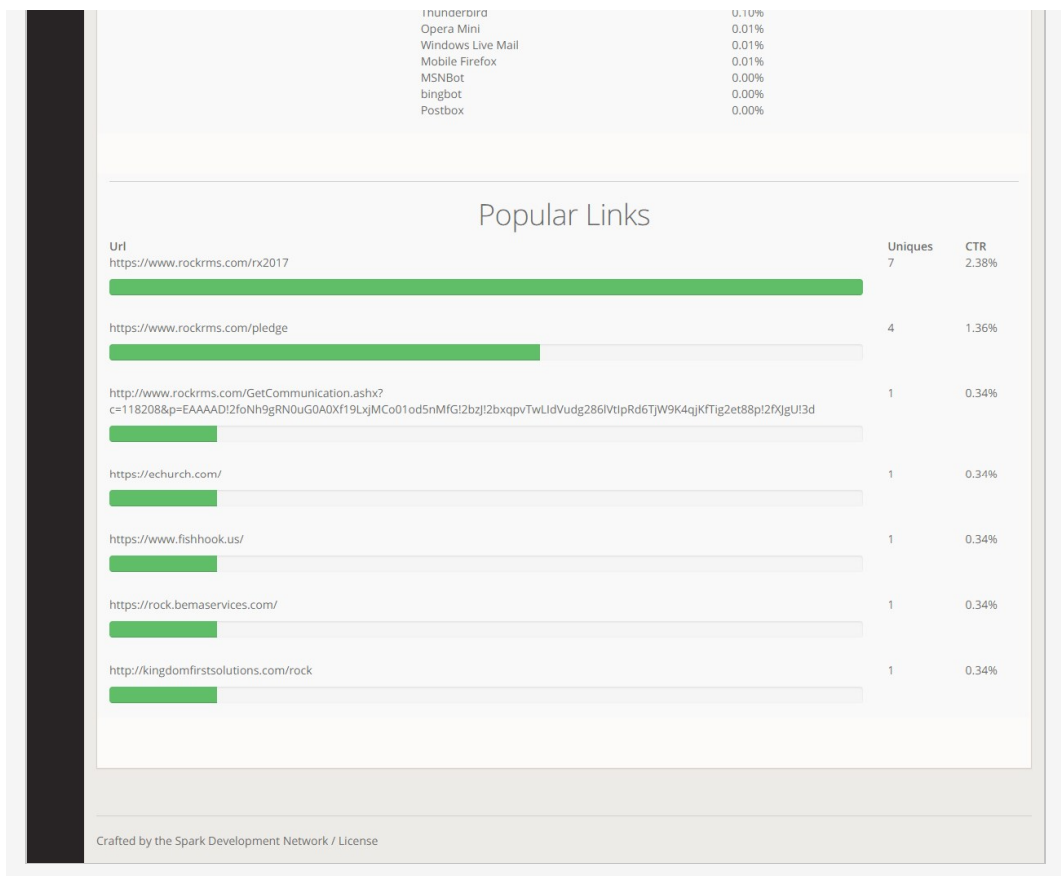
Viewing Analytics

There are three ways to view communication rollup analytics, depending on the kind of data and amount you want to see:

- All communications
- Communications from a list
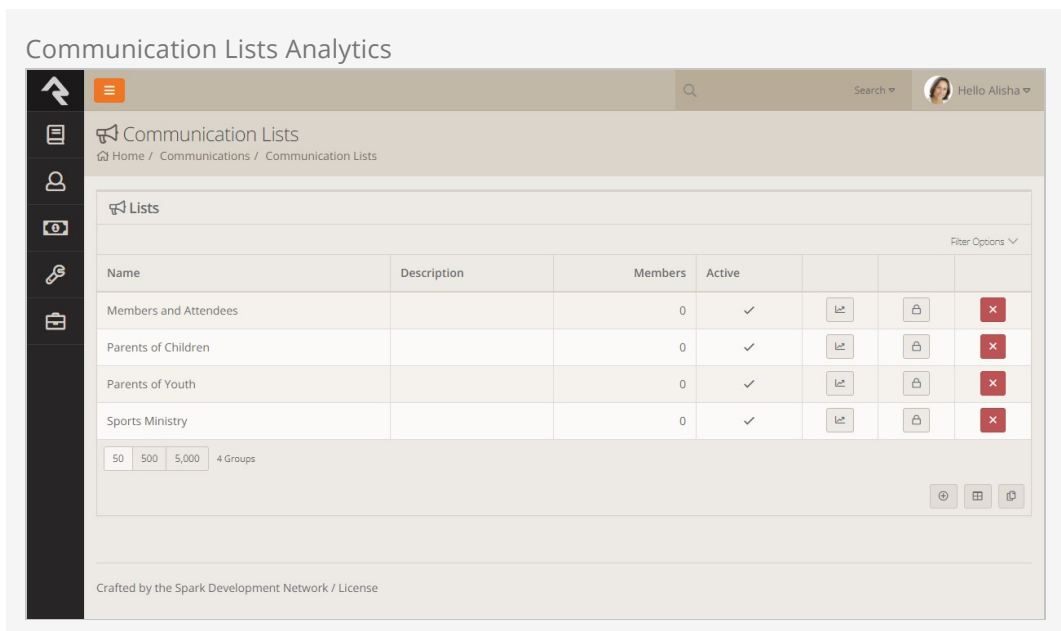- Individual communications

You'll probably find viewing analytics of individual communications the most interesting and useful option.

To view the analytics of all communications, go to `People > Email Analytics` .
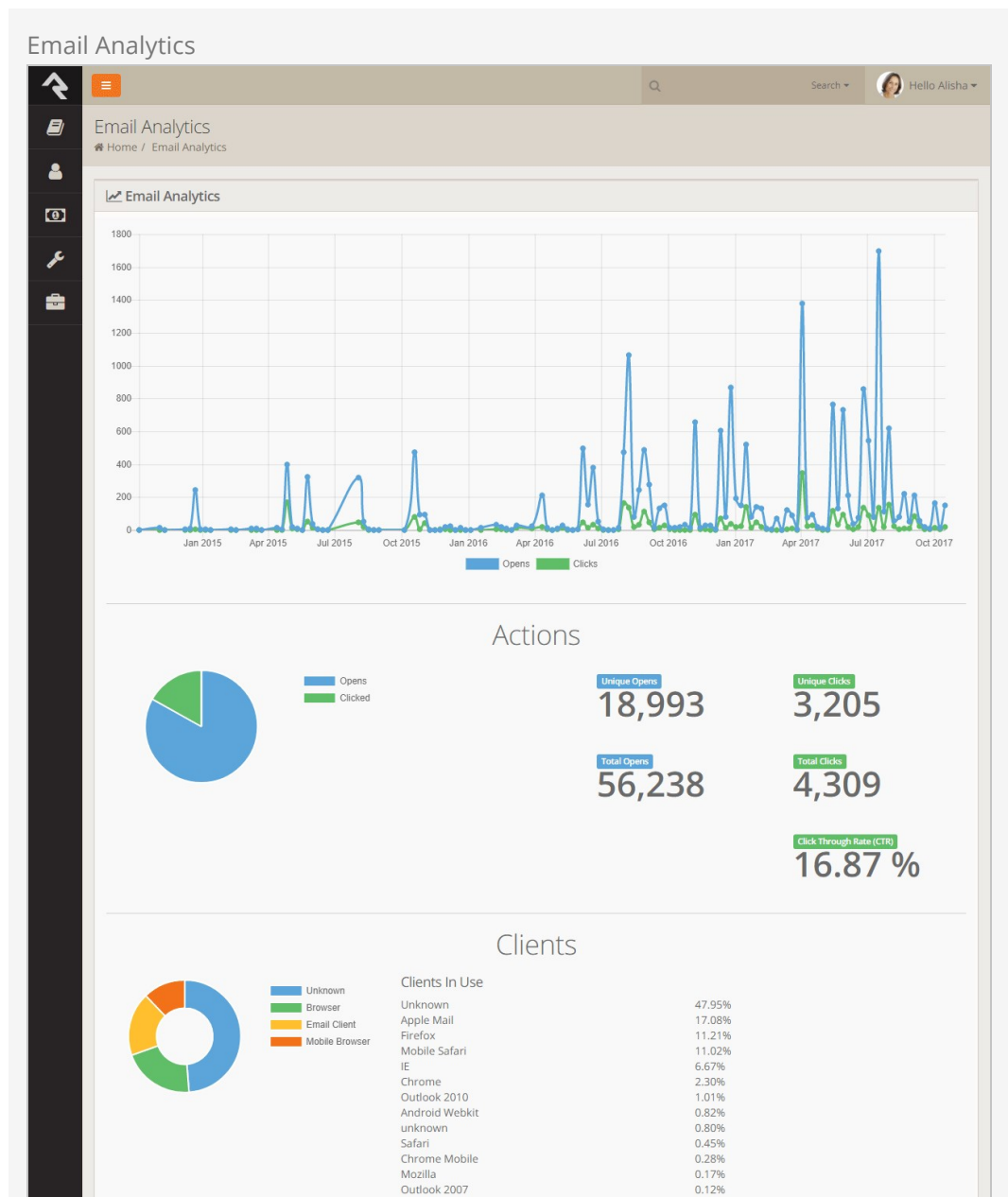
To view the analytics of communication lists, click the ⬜ button of the list you want to view in the *Communication List* screen, found at `Admin Tools > Communications > Communication Lists` .

Communication Lists Analytics

Finally, you can view the analytics of individual emails in the *Communication History* screen, located at `People > Communication History.` . Click the ⬜ button of the email you want to view.

Email Analytics of Individual Communication

System Emails

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

Integrations

Email: Mailgun

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

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

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

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

Costs

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

While the free starter package will save you money, keep in mind that you will be given a shared IP address with other organizations. In addition to sharing that IP address, you'll share their reputation, and in some cases, their blacklist. If you find that your emails are not always getting through, or if you want to be on the safe side, you might consider purchasing a dedicated IP address for $59 per month. And if you've already found yourself on a blacklist, Mailgun has provided documentation about blacklists and how to follow up with their support in the event that you find yourself on a blacklist.

Setting Up Mailgun

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

1. Sign up for a new account on the Mailgun website.
2. Setup your domain. Mailgun will walk you through the DNS changes that need to be made to ensure the best delivery and spam protection.
3. Once setup is complete, click on the 'Domains' tab and then select the domain you would like to use in Rock. Note the 'API Key', 'SMTP Hostname', 'Default SMTP Login' and 'Default Password' fields. Note the values from these fields you'll need them in a step below.
4. Take a breather! You're almost done... The last step is to configure the webhooks in the Mailgun admin portal. To do this select 'Webhooks' from the navigation and put the following address into all of the events under "Legacy Webhooks". *http://[yourserver.com]/webhooks/Mailgun.ashx*

MailGun Webhooks
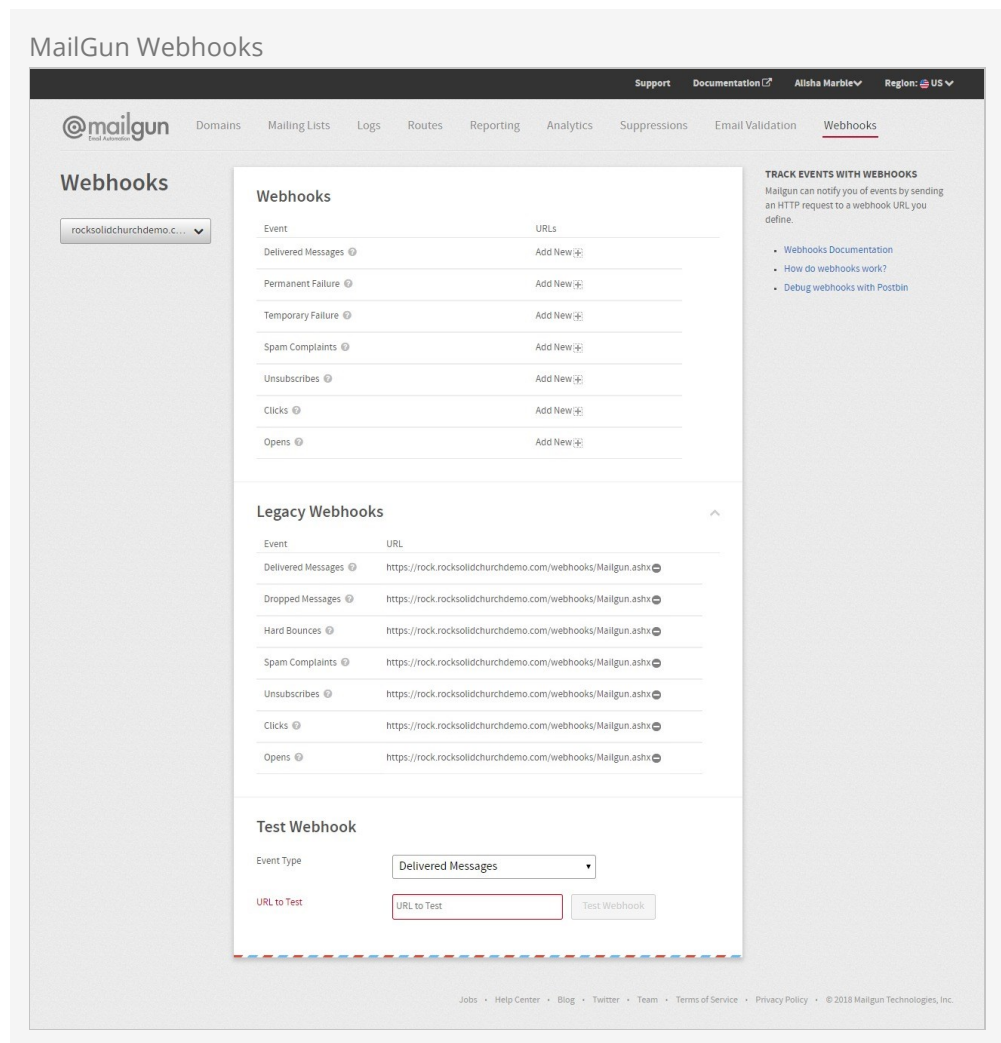
5. Let's head back to your Rock server. First, let's enable the Mailgun Transport under `Admin Tools > Communications > Communication Transports > Mailgun`. Start by checking the `Active` checkbox. Next provide the values from Step 2 above..

6. Last step and we're done. Now that the email transport is configured, we need to tell Rock to use it for the email medium under `Admin Tools > Communications > Communication Mediums > Email`. Select *Mailgun SMTP* under Transport Container.

SMS: Twilio

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

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

2. On your account page note your *Account SID* and *Auth Token*. You'll need this for Step 4 below.

3. In order to recieve replies from your SMS messages you'll need to provide a

'callback' (aka webhook) address for your SMS number. This tells Twilio how to tell Rock when this event occurs. You can set by clicking 'Numbers' from the main menu, selecting the SMS number you wish to configure, then adding the URL format below to the 'Messaging Request URL'.
http://-yourserver-/Webhooks/Twilio.ashx

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

4. Before you can actually use Twilio for real communications, you'll need to upgrade from the free trial.
5. From Rock navigate to `Admin Tools > Communications > Communication Transports > Twilio`. Enter in your *Account SID* and *Auth Token* and activate the transport. Click `Save` when done.
6. Next set the Twilio transport as the default transport for the SMS medium under `Admin Tools > Communications > Communication Mediums > SMS`.
7. Finally, add your Twilio phone number under `Admin Tools > Communications > SMS From Values`. You can add as many Twilio numbers here as you wish. Be sure that the phone number is in the *Value* field and that it is in the format of "+15555555555" (or similar for international numbers). You also must set a response recipient to get all of the replies to these numbers. Be sure the individual you select has a valid SMS phone number on their record.

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

> ### Twilio's Impact Access Project for Non-Profit Organizations
> Twilio offers a $500 kickstart credit to non-profit organizations. To learn more, visit www.twilio.org.

Email: Google Apps

This techincally 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. Authenication: Require SMTP Authenication
    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