# Module: Communication

## Section I: Develop Communication Infrastructure

### Lesson 1: Configure Demographics

**Details:** Develop demographic lists that segment by Geographic Location

* + - Create the following demographic lists: “Geographic location: North”, “Geographic location: South”, “Geographic location: East” and “Geographic location: West”.
    - *Tip: Communication > List Builder > Demographics*

### Lesson 2: Assign demographics to Custom Questions

**Details:** Create an ethnicity custom question and assign demographics

* + - Create a custom question that asks the customer for his/her ethnicity upon creation of account.
    - Ensure it is a single selection dropdown with North, South, East and West as the answers.
    - Assign the appropriate demographics to the answers
    - Enable this custom question to be asked when an account is being created
    - *Tip: Administration > Population Settings > Account Creation Questions*

### Lesson 3: Create E-mail subscription lists

**Details:** Create a subscription list for a brochure mail-out

* + - Add a new subscription list
    - Assign the list name, “Brochure Mail-out” with the appropriate description.
    - Show the description online
    - Set up population configuration to show subscription list on account creation
    - *Tip: Communication > List builder > Subscription List*

## Section II: Communication List Configuration

### Lesson 1: Create a customer list for interests

**Details:** Create a customer list for people involved in Aquatics

* + - Add a new customer list
    - Assign the list name, “Aquatics,” and add the Interest List “Aquatics” as a filter
    - Check “include no promotional e-mail customers” and “Include No promotional postal mail”
    - Generate the list and ensure the accuracy of the list
    - *Tip: Communication > List builder > Create customer List*

### Lesson 2: Create a customer list for demographics

**Details:** Create a customer list for people involved in Aquatics

* + - Add a new customer with your personal e-mail and with a Chinese ethnicity
    - Ensure the customer subscribes to the General Info subscription list
    - Add a new customer list
    - Assign the list name, “Oriental” and add the demographic “Oriental” as a filter
    - Check “include no promotional e-mail customers” and “Include No promotional postal mail”
    - Generate the list and ensure the accuracy of the list
    - Note: there should only be one customer record in the list.
    - *Tip: Communication > List builder > Create customer List*

### Lesson 3: Create a customer list for subscriptions

**Details:** Create a customer list for customers who opted into the subscription

* + - Add a new customer list
    - Assign the list name, “General Info Subscription” and add the subscription list “General Info” as a filter
    - Check “include no promotional e-mail customers” and “Include No promotional postal mail”
    - Generate the list and ensure the accuracy of the list
    - Note: there should only be one customer record in the list.
    - *Tip: Communication > List builder > Create customer List*

### Lesson 4: Create a customer list of everyone who has reserved a facility

**Details:** Create a customer list for customers who have made a billable reservation

* + - Add a new customer list
    - Assign the list name, “Facility External Reservations” and add the Schedule type “Reservation: Billable” as a filter
    - Check “include no promotional e-mail customers” and “Include No promotional postal mail”
    - Generate the list and ensure the accuracy of the list
    - *Tip: Communication > List builder > Create customer List*

### Lesson 5: Create a customer list for expired memberships

**Details:** Create a customer list for customers whose memberships will expire in the next three months

* + - Add a new customer list
    - Assign the list name, “3 month reminder” and set the membership expiry date filter for three months from now.
    - Check “include no promotional e-mail customers” and “Include No promotional postal mail”
    - Generate the list and ensure the accuracy of the list
    - *Tip: Communication > List builder > Create customer List*

### Lesson 6: Locking a customer list

**Details:** Locking and unlocking a customer list

* + - Search for the “General Info” customer list, generate the list and lock the list.
    - Add a new customer and subscribe to the General Info list
    - Search for the “General info” customer list and select it
    - Note: Notice that the new customer is not added to the “General Info” customer list.
    - Unlock the list and re-generate it
    - Note: The new customer is now added to the list
    - *Tip: Communication > List builder > Create customer List*

## Section III: Sending Communication

**Note:** Your ActiveNet site will send e-mails in this section. Please ensure that the recipients only have your personal e-mail address. Please do not send these e-mails to anyone outside of the Active Network.

### Lesson 1: Sending a plain text e-mail

**Details:** Send an e-mail to the Oriental demographic list

* + - Select the Oriental Customer list
    - Select a “from address.” Add a new e-mail address if there is none in the system.
    - Write an e-mail to wish your customers a Happy Chinese New Year.
    - Use merge fields “First Name” and “Last Name” in the salutation of the e-mail
    - Select Send Email Notification and Track Email Open / Click Through.
    - Click “Send Email”
    - Preview the E-mail, unselect “Preview Recipients” and send the e-mail
    - Note: Check your personal e-mail inbox and review the e-mail sent from ActiveNet
    - *Tip: Communication > Email/Form Letter > Create Email/form Letter/Text Message*

### Lesson 2: Sending a dynamic content e-mail

**Details:** Send a dynamic content e-mail to promote Aquatic activities to the General info list

* + - Select the General Info Customer list
    - Select a “from address” with a subject: “New Activities”
    - Select “Include dynamic content” with Aquatics as the primary category
    - Remove any Activity Details that you do not want to include in the e-mail
    - Preview the e-mail and send
    - Review the e-mail in your inbox
    - *Tip: Communication > Email/Form Letter > Create Email/form Letter/Text Message*

## Section IV: Communication Reports

### Lesson 1: Customer Listing Reports

**Details:** Review your customer lists

* + - Select your Aquatics custom list
    - Run the Report
    - Note: This report shows you customers of the customer list you generated previously
    - *Tip: Communication > General Reports > Customer Listing*

### Lesson 2: Communication Results Report

**Details:** Review the results from your e-mail campaigns

* + - Search for your e-mail batches. Enter dates that capture all your e-mail campaigns.
    - Select all your e-mail campaigns
    - Run the Report
    - Note: This report lists the results of your campaigns and the recipients
    - Note: The results only reports on the sending of emails and not the receipt of them. If the email bounces back it will not be captured in the results.
    - *Tip: Communication > Email/form Letter > Results*