



Assimilations Training Manual

1. Assimilations icon
2. Click on the 'Email' icon
3. Click on the 'Add Email Template' button
4. Fill in the Sender Name, Sender Email, and Subject of your message
5. Type out an email message in the text area provided using the Shortcodes below
6. Select to 'Include Email Signature and Logo' if desired, and 'Save'
7. Click on the 'Letter' icon and 'Add Letter Template' button
8. Give your letter a Title, and type it as you would like it to appear when printing out
9. Use the same Shortcodes as in the Communications area for Date and Name
10. Click on the 'Save' button
11. Click on the 'Create Campaign' icon to start creating a Campaign
12. Name your campaign
13. Add a Leader and/or Overseer via the 'Member Select' icons
14. Choose for your Leader/Overseer to Receive Notifications via the checkbox provided to be notified when the Campaign is triggered
15. Add a Description if desired
16. Select a Campus from the dropdown menu if it's associated to a specific Campus
17. Select the 'Type' which will determine *who* the Campaign will be generated for
18. Select Member Statuses, Services, or Ministries
19. Add your first Connection Point below
 - a. Connection Points are the different avenues of automated communication you set up for your Campaign (the pre-written emails, sms messages, and letters that you have created)
20. First, choose a Name that correlates with the Connection Point you create
21. Next, select When you want the Connection Point to be generated
22. Choose anywhere from Instant, to a specific amount of days, weeks or months
23. Select the Email, SMS, or Letter checkbox, and choose from the dropdown menus below
24. Continue to add Connection Points via the 'Add Connection Point' button
25. When you are finished adding Connection Points, click on the 'Save' button
 - a. Once you have created a Campaign, you can add a Connection Point to a Campaign at any time
26. Go to the 'Connection Point' icon, select a Campaign from the dropdown menu, add your Connection Points, and 'Save'