



You're just minutes away from sending your first message.

If you're a new user it's very important to set up a few basic account settings before sending notifications. Performing the simple one-time setup below will make learning the system and sending notifications quick and easy. Print this brief guide and follow the step-by-step instructions to configure your account preferences, create a test list and send your first call.

Set your account preferences.

1. Click the **Account** link in the top right corner of the page.
2. Insure that all of the information in the **Account Information** section is completed.
[Note: For additional information about each field, hover your mouse pointer over the field name.]
3. In the **Phone** field enter the phone number you're most likely to be located at when recording a message. The system can automatically call the number to allow you to quickly record a message.
4. Click the **Done** button at the bottom of the page to save your changes.

Create a test list

A test list of your cell phone or home phone is an important tool that you can reuse to send test calls, emails and SMS Text messages while learning the system.

1. Click the **Notifications** tab.
2. Click the **Create New List** button.
3. For the **List Name** use something like "My Cell Phone" or "My Home Phone".
4. Click the **Enter Contacts** button in the **Additional List Tools** section.
5. Enter your name, phone number, email address and SMS Text number (if that option is available).
6. Be sure to select all the job type options for each number and email address.
7. Click the **Done** button to add yourself to this list.
8. Click the **Done** button again to save your list.

Send yourself a call!

It's a good practice to always start by writing down the message you plan to record and send.

1. Click the **Start** tab.
2. Click **EasyStart**.
3. Enter a **Job Name** (e.g. My First Test Call).
4. Select a **Job Type** (usually "General")
5. Select the **Record** option. Then click Next.

Job Type

Job Name ✓ My First Test Call

Type/Category ✓ ☐ Attendance ☒ General

Notification Method ✓

☒ **Record**

- EasyCall
- Record Phone Message
- Auto Email Alerts

☐ **Write**

- Type All Messages
- Text-to-Speech Phone
- Automatic Translation

☐ **Record & Write**

- Record Phone Message
- Type Email Message
- Automatic Translation

☐ **Customize**

- Click the **Choose an Existing List** to select the test list you created. Then click Next.
- In the **Phone Number** field, enter the direct access phone number (10-digits) where you are currently located.

[Note: SchoolMessenger cannot call extensions]

MessageSender

Progress

- ✓ Job Type
- ✓ List
- Message:
- Phone:
- Record**
- Schedule:
- Schedule Options
- Confirm:
- Review and Confirm
- Finish

Record

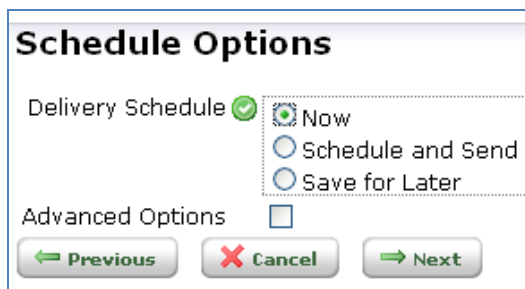
Message Tips

- Introduce yourself
- Clearly state the reason for the call
- Repeat important information
- Instruct recipients what to do should they have questions

Voice Recordings ⚠

831-245-9987

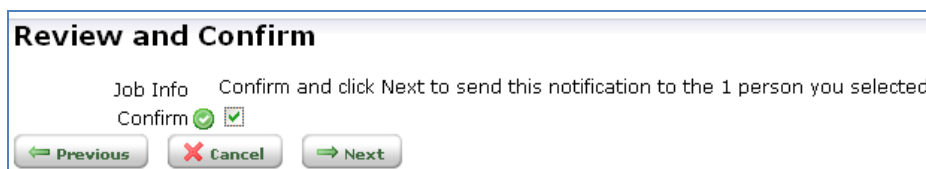
- When you have your message prepared and ready to record, click the **Call Me to Record** button.
 - When the system calls you, follow the prompts to record and save your message.
- [Important: As soon as you are done speaking, press any key to stop the recording. The message will automatically replay. You must press 1 to save your message. Hanging up the phone prior to pressing 1 will not save your message and will require you to re-record it.]*
- When your message is saved click the Next button.
 - Select **Now** to send this job immediately. Then click Next.



The 'Schedule Options' dialog box contains the following elements:

- Schedule Options** (Section Header)
- Delivery Schedule** (Label) with a green checkmark icon.
- ☒ **Now**
- ☐ **Schedule and Send**
- ☐ **Save for Later**
- Advanced Options** (Label) with an unchecked checkbox.
- Previous** button (with a left arrow icon)
- Cancel** button (with a red X icon)
- Next** button (with a right arrow icon)

12. On the **Review and Confirm** page review the job information. Then click the **Confirm** box.



The 'Review and Confirm' dialog box contains the following elements:

- Review and Confirm** (Section Header)
- Job Info** (Label)
- Confirm** (Label) with a green checkmark icon.
- Text: "Confirm and click Next to send this notification to the 1 person you selected"
- Previous** button (with a left arrow icon)
- Cancel** button (with a red X icon)
- Next** button (with a right arrow icon)

13. Click **Next** to submit your job for processing.
14. When your phone rings simply answer it, and listen to the prompts to hear your message.

Congratulations! You just sent your first notification.

For more detailed feature information see the training guide *"Getting Started with v7"* in **Help** located in the top right corner of the page.