



Advanced Training

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Before you Begin

The intent of this training guide is to equip those familiar and comfortable with the features reviewed in the *Getting Started* training guide with information on additional features.

This guide is not intended to cover every feature of the product. More advanced system features are spotlighted along with references to the online help section where they are covered in greater depth.

In *Getting Started* we reviewed most of the features available from the Dashboard. In this guide we will review features located under the *Broadcasts* and *Reports* tabs in the upper left section of your screen.


Advanced Lists

Building and saving simple rules-based lists was covered in *Getting Started*, where you were able to create a list while creating a new Broadcast right from the Dashboard. In this guide, you'll learn how to use the other options in the *Add Message Recipients* menu and how to manage your saved lists using the List Builder.

From the Dashboard

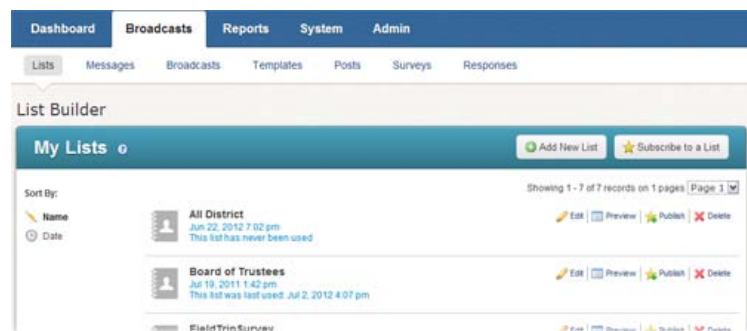
You've probably noticed there are some additional list building tools available when creating a new Broadcast from the Dashboard: ⚡ *Quick Pick* and 📁 *Upload List*. Quick Pick lets you search for and add individuals from your contacts while Upload List lets you upload a list of individuals to contact. Each of these is a convenient shortcut to the same tool in the List Editor, described below. If you want to skip directly to the information about these tools, please see the *Quick Pick* section on page 7 and *Uploading CSV File Lists* on page 8.

List Builder

If you've created lists while creating a Broadcast from the Dashboard and clicked the cloud button  to save them, you will see your lists in the List Builder. The

When you click the *Broadcasts* tab you are taken directly to the List Builder screen. Here you will see the *Create a List* button. You will also see links to *Edit*, *Preview* or *Delete* existing lists along with information on when you last used each list. Options for adding and/or removing individuals from lists can be used alone or in conjunction with any of the other methods for list building.

This section will focus on the features available from the List Editor, which you can access by making a new list in the List Builder. Note that any list you create here will also be available for you to use when creating a new Broadcast from the Dashboard.



Create a List

- Click on the *Broadcasts* tab. You will be taken to the *List Builder* by default.
- Click the *Add New List* button. This will take you to the *List Editor*.

You can build any type of list from the List Editor, including simple rules-based lists like you saw in *Getting Started*, however the List Editor allows you to access additional list building tools which can help you build more sophisticated lists when rules just aren't enough.

Additional List Tools

The following sections will discuss the features found in the Additional List Tools section of the List Editor.



Note: When you create a list using the List Editor, you can combine any of list building tools to create your perfect list. You can even use these features to add individuals to lists which are otherwise based on rules.

Manually Entering Contacts

The *Enter Contacts* button can be used to manually add individuals and their contact information to your lists.

- Click the *Enter Contacts* button.
- Enter the individual's contact information into the appropriate fields. You may also choose how this person is contacted based on notification type preferences by checking the appropriate boxes.
- Click the *Done* button at the bottom of the screen to add this person to your list. To add this person to your personal Address Book, make sure Save to Address Book is checked. You can add this individual to future lists by simply

ADDITIONAL LIST TOOLS

Tool	Description
Enter Contacts	Manually type in new contacts
Open Address Book	Choose from contacts you manually typed into your personal address book
Quick Pick	Search for people by name, ID#, email, or phone number
Search by Rules	Search the shared system contact database using rules
Upload List	Upload a list of contacts using a CSV file

Address Book Editor

First Name

Bob

Last Name

Smith

Language Preference

English

Address Line 1

Address Line 2

City

State

ZIP Code

Phone 1

831-987-6543

Preferences

Emergency ☒

Attendance ☒

General ☒

Newsletter ☐

Survey ☒

Email 1

bsmith@example.com

Preferences

Emergency ☒

Attendance ☒

General ☒

Newsletter ☒

Survey ☒

SMS 1

Preferences

Emergency ☒

Attendance ☒

General ☒

Newsletter ☐

Survey ☐


Save to Address Book ☒

Done

Cancel












using your Address Book.

- To add another person to your list, repeat the process.


 **Note:** To remove a manually added individual from your list simply uncheck the box next to the individual's name in the Additions section of the List Editor. Refreshing the screen will show the person is no longer in your list.

Adding Contacts from Your Address Book

The *Open Address Book* button opens your address book. Your account has a personal address book where you can store contact information for individuals you want to include in notifications, but who are not included in your simple lists.

Contacts ?								
In List	First Name	Last Name	Language	Phone 1 (Home)	Email 1	SMS 1	Address	Actions
<input type="checkbox"/>								 Edit  Delete
<input type="checkbox"/>	Ophelia	Callsworth	English	(987)654-3210	example@schoolmessenger.com	(987)123-4567		 Edit  Delete
<input checked="" type="checkbox"/>	Jen	Sawyer	English		example2@schoolmessenger.com			 Edit  Delete
<input checked="" type="checkbox"/>	Mary	Smith	English	(987)987-6543		(987) 987-6543		 Edit  Delete
<input type="checkbox"/>	Prescott	Smithswell	English		example3@schoolmessenger.com			 Edit  Delete

- Open your Address Book, as shown above, by clicking on the *Open Address Book* button located in the *Additional List Tools* section.
- After selecting the contacts you wish to add, finish by clicking the *Done* button.
- If your list is complete, click the *Done* button to save your changes, or continue adding additional rules or individuals to this list.

 **Note:** You can also access your address book by clicking the *Address Book* link in the upper right corner of your screen and add individuals at any time by clicking the *Add New Contact* button in your address book.

Quick Pick

Quick Pick allows you to rapidly search for individuals in your database by entering their name, phone number, ID number, or email address.

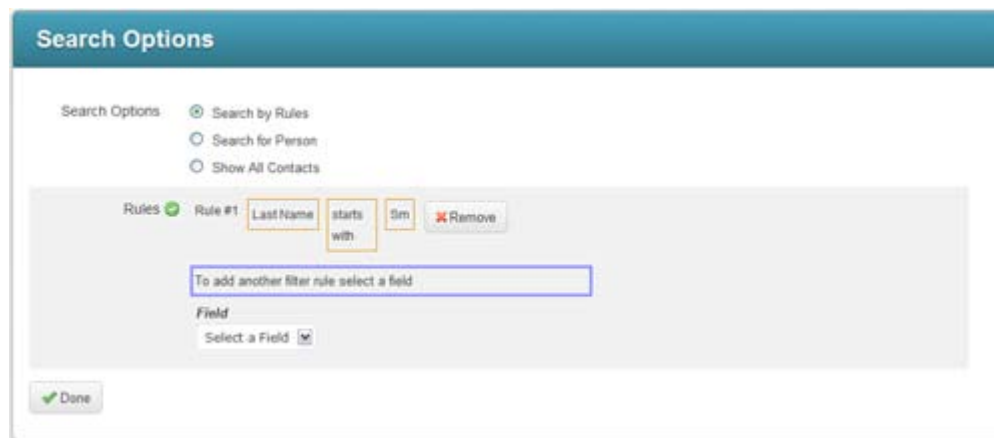


The screenshot shows a dialog box titled "Search Options". It has three radio buttons under "Search Options": "Search by Rules" (unselected), "Search for Person" (selected), and "Show All Contacts" (unselected). Below these is a text input field labeled "Search" with the placeholder text "Enter a name, phone number, ID#, or email". At the bottom are two buttons: "Search" and "Done".

- Click the *Quick Pick* button located in the *Additional List Tools* section to access the *List Search* screen
- Enter the individual's name, phone number, ID number, or email address in the search field.
- Click the *Search* button to display the results of your search.
- Select the individual for your list by checking the checkbox next to their name.
- Click *Done* to save your changes or continue building your list.

Searching by Rules

You can use the *Search by Rules* option to filter through your contacts and find individuals you want to add to your list. This can be useful if you need to find an individual when you don't have all the information you need to just use QuickPick. For example, if you need to find someone where you only know their last name or you aren't sure quite how to spell their last name, you can search with a rule which includes only their last name or the first letter(s) of their last name.



The screenshot shows a dialog box titled "Search Options". It has three radio buttons under "Search Options": "Search by Rules" (selected), "Search for Person" (unselected), and "Show All Contacts" (unselected). Below these is a section for rules. It shows "Rules" with a green checkmark, "Rule #1", and a rule: "Last Name" followed by "starts with" and "Sm". There is a "Remove" button next to the rule. Below the rule is a text input field with the placeholder text "To add another filter rule select a field". Below that is a "Field" label and a dropdown menu labeled "Select a Field". At the bottom is a "Done" button.

- Click the *Search by Rules* button located in the *Additional List Tools* section. This will redirect you to the *List Search* window.

- To filter your contacts by rules, select the search field and the comparison operator you wish to use (i.e. "is", "is not", etc.) in the *Criteria* area. Then select the data items that you wish to include in your search rule, and click the *Add* button.
- When you locate the person (or people) who you want to include in your list, simply click the checkbox to the left of their name. Repeat until you have selected everyone that you want included on your list.
- When you are finished, click the *Done* button at the bottom of the window, and you will be returned to the *List Editor*. From there you can save your list or continue by adding rules or more individuals to your list.

Uploading CSV File Lists

The *Upload List* button allows you to create a list of contacts by uploading a *Comma Separated Value* (CSV) text file. You can create a CSV file with spreadsheet software such as MS Excel.



Upload Types

SchoolMessenger can work with two types of CSV files, named for the data included in the file.

Contact Data

Contact Data CSV files contain complete contact information for your recipients with each column containing one field. For example: First name, Last name, email 1, email 2, phone 1, phone 2, etc.

- If you are uploading a Contact Data CSV file, be sure to select the radio button labeled Contact Data.
- Click Choose File to locate the file you would like to upload from your computer.
- Click Preview. In the Upload Preview, use the dropdown menus to tell the system what type of data is in each field, like in the following screenshot.

Upload Preview

Last Name ▼	First Name ▼	Email 1 ▼	Phone 1 ▼
Smith	Mary	msmith@springfieldisd.example.edu	8314328765
Martinez	George	gmartinez@springfieldisd.example.edu	8314328766

When you are done, click **Save** to return to the List Editor.

ID # Lookup

ID # Lookup CSV files contain only the ID numbers for your recipients as they exist in your database. The system will use the ID number to match the recipient's contact information already stored in the system.

- Click the *Browse* button to locate the file on your computer that you wish to upload.
- Click the *Preview* button to see the list once the ID numbers have been matched to the data in your database, like in the following screenshot.

Matched ID#s

ID#	First Name	Last Name	Phone Number	Email
101583	Emery	A	(543) 857-1290	
101620	Paulette	Abbott	(543) 857-1290	

- If your list looks correct, click **Save** to return to the List Editor.

Saving and Reusing Lists

Once you've finished adding all of the recipients to your list, be sure to save your list by clicking *Done* at the bottom of the List Editor.

You will be able to use your new list next time you create a new Broadcast from the Dashboard by clicking *Saved Recipient Lists* while adding building your list of Recipients in the list selection step.

Advanced Messages

As you saw in the Getting Started guide, you can easily create a simple Broadcast from the Dashboard. While it is frequently the case that you will just want to send a simple message, you'll probably want to take advantage of some of these advanced features on occasion as well.

In this section, you will learn how to:


- Personalize your message with dynamic data fields.
- Use a blend of audio and data fields in a phone message.
- Use the Social Media features.

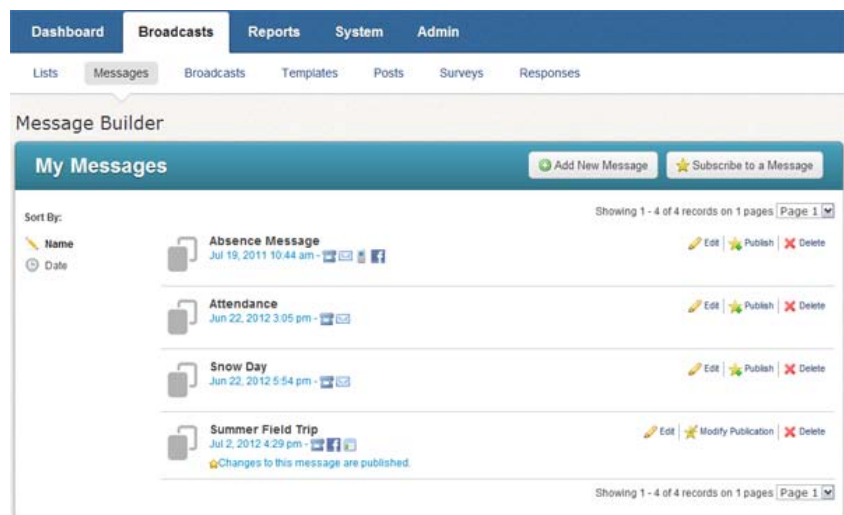
Creating a message using the *Message Builder* allows you to create a single message object that contains phone, email and SMS content (in multiple languages if you choose), which can then be easily selected later when creating a new Broadcast from your Dashboard.

Message Builder

The *Message Builder* is where you can create new messages and find any messages you've saved or subscribed to.

This guide will focus on the features you'll find in the *Message Editor*, which you can access by making a new message in from the Message Builder. Note that any message you create here will also be available for you to use when creating a new Broadcast from the Dashboard.

 **Note:** To learn more about publishing and subscribing to messages, please read the *Publish and Subscribe* content in the *Help* online.



Create a Message

- Click the *Broadcasts* tab followed by the *Messages* subtab.
- Click the *Add New Message* button.
- Enter a name for your message and click *Next*.

Message Editor

When you create a message for a Broadcast, you must create message content for all of the destinations you'd like to use.

Message Content



Note: You may not be able to see certain content types due to settings in your Access Profile.

You can send your Broadcast to a number of destinations, each with one or more content types. The Message Content area contains a grid of content types and languages you can use. The content types are:


- **Phone:** The phone message component.
- **SMS:** SMS text message.
- **HTML Email:** The HTML version of your email.
- **Plain Email:** A plain text email for recipients who prefer to not receive HTML emails or are otherwise unable to view HTML.
- **Facebook:** The message to post to an authorized Facebook page.
- **Twitter:** The message to post to Twitter.
- **Page:** This creates a web page which will be linked via a tiny URL (short link) to your Facebook and Twitter posts. This allows you to post larger messages and provide downloads of files such as PDFs to Facebook and Twitter.
- **Page Media:** If you would like to embed audio in your Page, use the wizard here to record or upload an audio message. It will appear in an embedded player on the Page.

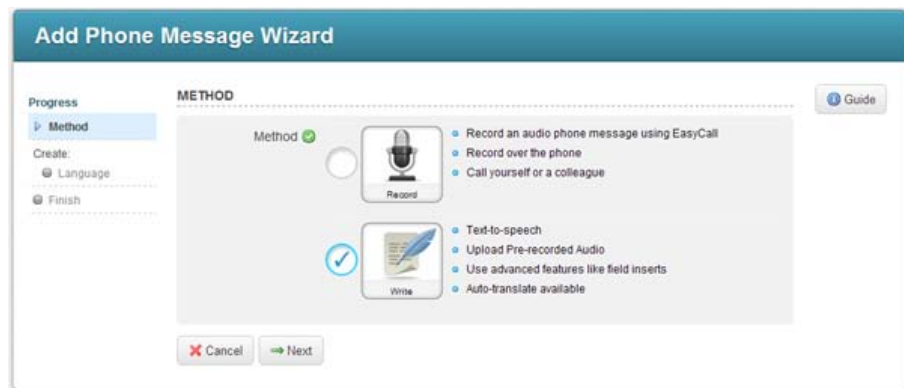
At the top of each column, you'll find the name of each content type accompanied by a green plus icon (+). Clicking this icon will take you to a guided process for creating content of that type.

Under each content type, you'll find a series of clear icons with a dropdown tab menu component. As you create content, these will go from clear to green and can be used to quickly tell which content types have been created. Additionally, if you wish to create, edit, or remove the content for a particular language, click the dropdown tab to open the menu for that message component.

Adding Phone Message Content

Let's start by adding the Phone message component to the new message.

- Click the green plus icon  next to *Phone* in the Message Content Type grid.
- Select *Write* and click *Next*.



You will have two options for creating Phone message content.

- **Record:** This option is just like *Call Me to Record*, which you've already used when you followed the tutorial in the *Getting Started* guide. If you just want to create simple phone message content, you should use this option. The system will call you and guide you through recording your phone message.
- **Write:** This option gives you access to the Advanced Phone Message Editor which is loaded with powerful features for creating phone messages. You should use this if you want to create phone messages with dynamic data inserts, mixtures of audio files and text-to-speech, or to upload audio files you've recorded elsewhere.

This guide will focus on the *Write* option which gives you access to the extensive features of the Advanced Message Editor.

Personalizing Your Message with Data Fields

In this section, you will be creating a text-to-speech message which uses data fields to provide a personalized message for each recipient. Once you learn about inserting data fields, you'll be ready to take on mixing audio files and data fields in the next section.

Step 1:

When you create a Text-to-Speech phone message, you may choose to automatically translate your English message to other languages, using machine translation from Google, or choose to create a message in one particular language. If you choose to create your message in just one language, you can add the other languages later by clicking on the icon corresponding to the language and content type in the Message Content grid.

- Select a language option.
- Click Next to continue.

Add Phone Message Wizard

Progress

- Method
- Language
- Advanced
- Finish

LANGUAGE

Language ☒ Automatically Translate from English to other languages

☐ Create the English message

☐ Create the Spanish message

Step 2:

The next screen is the *Advanced Phone Message Editor*. Here you will enter your message to be read by text-to-speech and then insert data fields as needed.

Add Phone Message Wizard

Progress

- Method
- Language
- Advanced
- Translations
- Finish

BACK TO SCHOOL NIGHT (ENGLISH)

Message Tips

This is the English version of the message.
Automatically translated messages will use this as the source.
After entering the English version, click **Next** to review/edit the translations.

Advanced Message

Hello,

This is a message from Springfield High School, calling to inform you that your child, <<First Name>> <<Last Name>>, was marked absent today, <<%Date%>>.

Please call the attendance office at 987-654-3210 to excuse this absence. If you have already done so, please disregard this message. Thank you!

Voice Recording

(800) 920-3897

Audio Upload

No file chosen

Audio Library

English Jul 12, 2012 1:20:58 pm

Data Fields

Default Value: Data Field:

Gender

☒ Female ☐ Male

- Type your message in the *Advanced Message* field.
- Place your cursor at the location where you would like to insert dynamic data.
- Select the field you wish to insert from the *Data Fields* menu at the bottom of the screen. You may optionally enter a default value for the data field you insert. This value will be read in situations where a recipient is missing data of that type.

- Select a gender for the text-to-speech voice and click *Preview* to listen to your message.
- Click *Next* when you're ready to continue.

IMPORTANT: Data fields are inserted into your message enclosed in double brackets, as you can see in the screenshot above. If you continue to edit your message after inserting data fields, be careful that you do not accidentally delete these brackets or alter their content. This will result in your message not playing back correctly.

Note: Some languages do not have options for both genders. In this situation, your message will play in the available gender for that language, regardless of your selection.

If you chose to automatically translate your message, you will be presented with the translated versions generated by Google's translation service.

Any translation can be disabled, causing recipients with a preference for that language to receive the message in your default language. A translation can be manually overwritten by clicking on the message content for that language in the Message Content grid and selecting "Edit".

Add Phone Message Wizard

Progress

- Method
- Create
- Language
- Advanced
- Translations
- Finish

TRANSLATIONS

English

Hello, This is a message from Springfield High School, calling to inform you that your child, <<First Name>> <<Last Name>>, was marked absent today. <<%Date%>>. Please call the attendance office at 987-654-3210 to excuse this absence. If you have already done so, please disregard this message. Thank you!

SPANISH

Enabled ☒

Hola, Este es un mensaje de Springfield High School, llamando para informarle que su hijo, <<First Name>><<Last Name>>, Se marcará ausente hoy en día, <<%Date%>>. Por favor, llame a la oficina de asistencia al 987-654-3210 para excusar su ausencia. Si lo ha hecho, por favor ignore este mensaje. ¡Gracias!

Show in English Play

Translation powered by Google™


Previous Cancel Next

- Click *Next* to Continue.
- Click *Done* in the following screen to return to the Message Editor.

Composing a Phone Message with Audio Files and Data

If you would prefer to use recorded audio, but still have the ability to insert data fields, you can do this from the Advanced Phone Message Editor as well.

Note: Automatic translation only works on typed messages. You will not be able to automatically translate audio recordings.

- Click the green plus icon  next to *Phone* in the Message Content Type grid.
- Select *Write* and click *Next*.

Call Me to Record

In the Advanced Phone Message Editor, you can use *Call Me to Record* to have the system call you to record snippets of audio for your message. You can record one snippet per call. These snippets will appear as audio files in the *Audio Library*.

You must record the audio so that you can insert data fields between snippets. For example, from the message in the screenshot above, each section of blue text would be an individual recording:

This is a message from Springfield High School, calling to inform you that your child, <<First Name>> <<Last Name>>, was marked absent today, <<%Date%>>.

Upload Audio

If you have recorded your audio files elsewhere and would like to use them in your message, you can upload them to the Audio Library. Simply click the Choose File button and locate the audio files on your computer. You can also use this method to upload entire messages which have been recorded elsewhere, such as professionally recorded messages which you will not use with data fields.



Note: The system supports the following audio file formats: .wav, .aiff, .au, and .mp3.

Composing Audio Snippets and Data Fields


Once your audio files are in the Audio Library, you're ready to assemble your message.



- In the Audio Library, select the first audio file for your message and click Insert.
- Insert any data fields, as you did in the previous section.
- Repeat this process for each audio file and data field you wish to include.
- Select the gender of the text-to-speech voice. It typically sounds best if you pick the same gender as the speaker in your audio files.
- Click Preview to listen to your message.
- Click Next when you're ready to continue.
- Click Done in the following screen to return to the Message Editor.

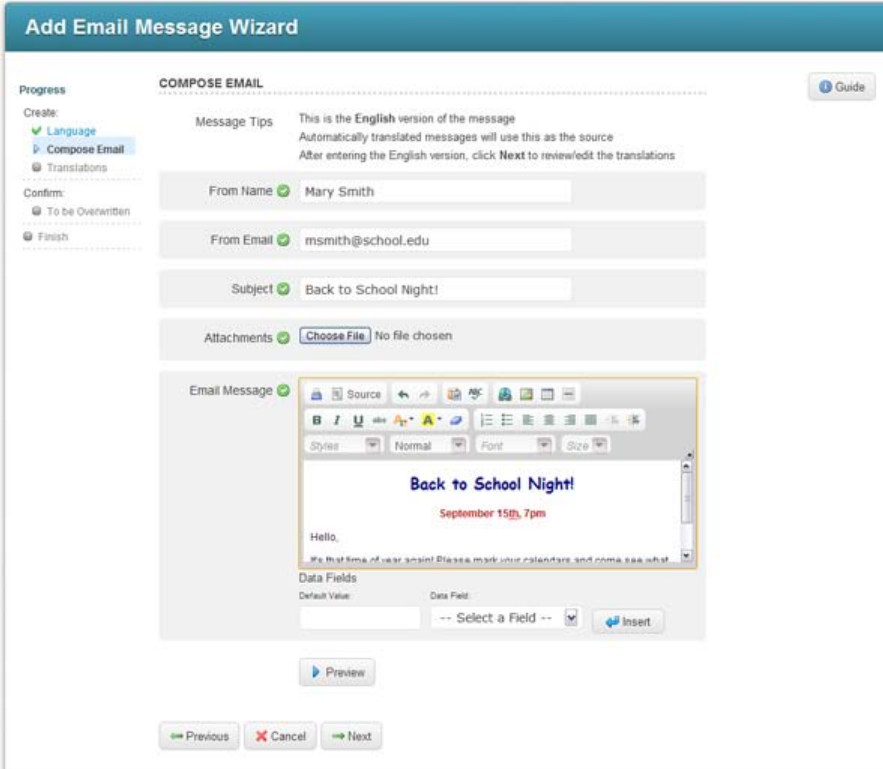
Adding Email Message Content

Now we're ready to add an Email component to this message.

Create a new HTML Email with Data

- Click the green plus icon  next to *HTML Email* in the Message Content grid.
- Select a Language option just like you did with *Phone* and click *Next*.
- To access the menu for editing HTML or using the Paste from Word feature, click the small triangle in the upper right corner of the Email Message field.

 **IMPORTANT:** If you have already created a message using Microsoft Word and you want to paste that message into the HTML editor, use the “Paste from Word” button in the editor menu, which looks like this: . Messages which are copied and pasted from Word contain extra, non-standard, information which may cause your message to not display correctly. Using “Paste from Word” will remove most of this information. While you may paste a message from Word, for best results it is better to compose your message using the HTML editor if possible.



- Place your cursor at the location where you would like to insert dynamic data.

- Select the field you wish to insert from the *Data Fields* menu at the bottom of the screen. You may optionally enter a default value for the data field you insert. This value will be read in situations where a recipient is missing data of that type.
- Click *Preview* to see how your HTML email looks.
- When you're ready to continue, click *Next*.

If you chose to automatically translate your message, you will be presented with the translated versions generated by Google's translation service.

Any translation can be disabled, causing recipients with a preference for that language to receive the message in your default language. A translation can be manually overwritten by clicking on the message content for that language in the Message Content grid and selecting "Edit".

- Click *Next* to Continue.
- Click *Done* in the following screen to return to the Message Editor.



Note: To include a plain text email for recipients who cannot view HTML emails, you will need to create a plain text email from the Message Content grid. You may use the Plain Email wizard, which you can access by clicking on the green plus icon next to "Plain Email".

Adding SMS Message Content

To add SMS text message content, simply click the green plus icon next to SMS in the Message Content grid, enter your message in the SMS text editor, and click "Done".

Adding Facebook and Twitter Content

If your message should contain a Facebook or Twitter post, simply click the green plus icon next to Facebook in the Message Content grid next to each of these types and enter your post into each editor.

The screenshot shows the 'Facebook Message Editor' window. At the top is a blue header bar with the text 'Back to School Night'. Below this is a section titled 'BACK TO SCHOOL NIGHT (ENGLISH)' with a 'Guide' link on the right. The main editing area is divided into two parts: on the left, a 'Facebook Message' label with a green plus icon; on the right, a large text box containing the text 'Back to school night will be September 15th at 7pm. We hope to see you there! Click the link for a flyer with the details.' Below the text box, it says 'Characters remaining: 298' and has a 'Spell Check' icon. At the bottom left is a 'Done' button with a green checkmark.

Adding RSS Feed Content

If your message should contain a post for your RSS Feed, click the green plus icon next to Feed in the Message Content grid and enter your headline and post into the Feed Message Editor.

The screenshot shows the 'Feed Message Editor' window. At the top is a blue header bar with the text 'Back to School Night'. Below this is a section titled 'BACK TO SCHOOL NIGHT (ENGLISH)' with a 'Guide' link on the right. The main editing area is divided into two parts: on the left, a 'Headline' label with a green plus icon and a text box containing 'Back to School Night'; below that, a 'Feed Message' label with a green plus icon and a large text box containing 'Back to school night will be September 15th at 7pm. We hope to see you there!'. Below the text box, it says 'Spell Check' with a green checkmark icon. At the bottom left is a 'Done' button with a green checkmark.


Adding a Page and Page Media

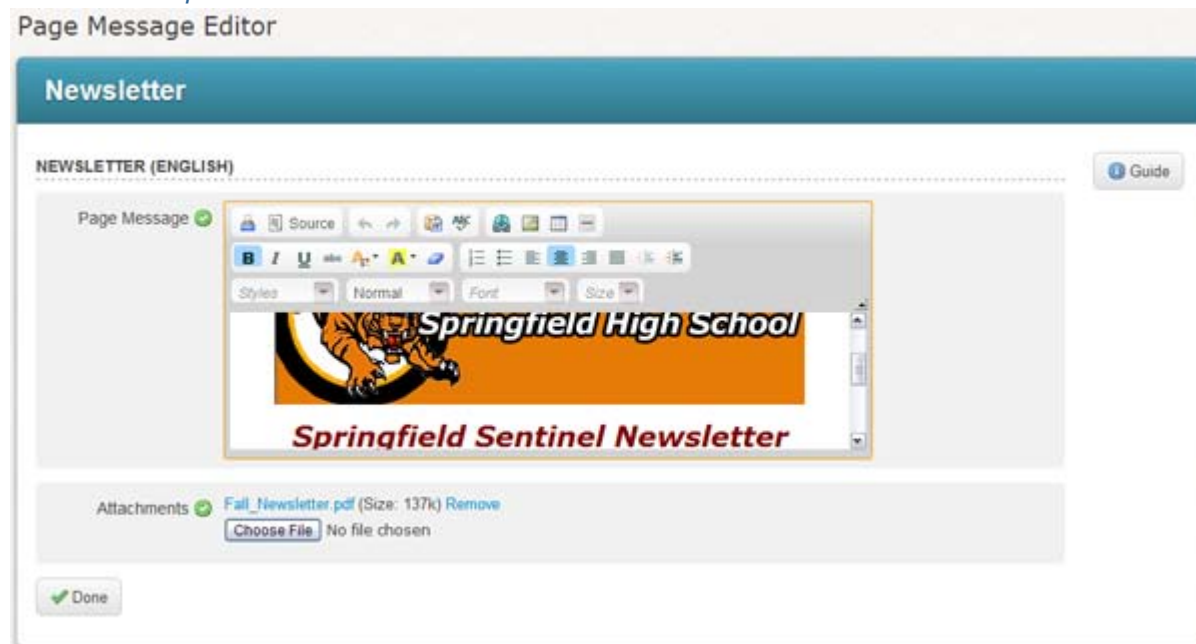
Do you have more to say than will fit in a mere 140 characters? You may have noticed that the previous screenshot contained an example that referred to a link. That's because this Facebook post is intended for use with a Page message type. A Page is not actually a message in the normal sense, rather it is an actual web page that you can make as easily as you created an HTML email. Pages are automatically linked to your Facebook and Twitter posts using a short link.

Create a Page

- Click on the green plus icon next to “Page” in the Message Content grid. You’ll see an HTML editor just like you would if you were making an HTML email.
- To access the menu for editing HTML or using the Paste from Word feature, click the small triangle in the upper right corner of the Email Message field.

IMPORTANT: If you have already created a message using Microsoft Word and you want to paste that message into the HTML editor, use the “Paste from Word” button in the editor menu, which looks like this:

 Messages which are copied and pasted from Word contain extra, non-standard, information which may cause your message to not display correctly. Using “Paste from Word” will remove most of this information. While you may paste a message from Word, for best results it is better to compose your message using the HTML editor if possible.



Add Attachments for Download

Notice the Attachments option at the bottom of the editor. You may attach files to your page just like you would with an email. The difference is that when the page is created, these files will appear as links in a Download section. This is a great way to distribute files that are too big for email. Attachments to pages are not as limited in size and number as they are for emails.

Add Embedded Audio

If you would like to embed audio such as your phone message or some new audio into your page, you can do this from the Message Content grid by clicking on the green plus icon next to “Page Media”. People viewing your page will be able to listen to the audio in an embedded audio player. The player is also available for viewers to use right on your Facebook Page.

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Springfield Test SD

The Fall newsletter is out! Follow this link to view the latest information on upcoming school activities, rules, and important news regarding SAT test dates.

[Fall 2011 Newsletter - Springfield SD](#)

4mes.gs

People viewing the post on Facebook can simply click on the play button to listen to the audio portion of your post. The player contains a link to your Page content. Alternatively, they may click on the link to view your Page content. An audio player will be available at the top of the Page, as shown in the example generated page below.

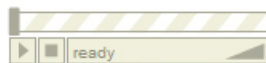


Springfield High School

Fall 2011 Newsletter

Sent: Jul 20, 2011

Media

[Download](#)

Files

 [Fall_Newsletter.pdf](#)

Springfield Sentinel Newsletter

Fall 2011

Welcome back to school! We hope you had a great summer and are refreshed and ready to learn!


Using Your Message in a Broadcast

Using your saved messages in a Broadcast is simple. It's actually not all that different from creating a New Broadcast as we did in the Getting Started guide.

- Click the New Broadcast button on the Dashboard and proceed as normal.
- At the Message Content step, click the *Load Saved Message* button, highlighted below.

The screenshot shows the 'New Broadcast' interface with three steps: 1. Subject & Recipients, 2. Message Content, and 3. Review & Send. Step 2 is active. Below the steps, there is a message type selection area with a red box highlighting the 'Load Saved Message' button. Below this are four buttons: '+ Phone', '+ Email', '+ SMS', and '+ Social'. At the bottom right is a 'Continue >' button.

- Select your message from the list of saved messages.

 **Note:** If your message contains an RSS Feed post, you will need to select which category the post should be published under. If you do not do this, your RSS content will not be posted. After selecting your saved message, click “Add Social”. Below your RSS content, you will see the categories you can post to in the Post to Feeds section. Select the appropriate category and then click Save Social Messages.

- Click the green preview checkmarks to review any portions of the message you wish. Then click *Continue*.
- Click Continue to move to the *Review & Send* stage.
- If everything looks correct, click *Send Now*.

Authorizing Social Media Accounts


Before you can post to social media sites, you will need to allow the SchoolMessenger social media apps to have access to your accounts. You can do this from the Account link at the top of any page. You will only need to grant permission once. Your permission will last until you deliberately revoke it.

Authorizing a Facebook Account


The image below shows the social media options on the Account Settings page, found at the Account link in the upper right corner of any screen.

SOCIAL MEDIA OPTIONS

Add Facebook
Account

 Connect to Facebook

Add Twitter
Account

 Connect to Twitter

- Make sure that you are either logged into the Facebook account you wish to authorize or are not logged into Facebook at all.
- Click the “Connect to Facebook” button.

If you are logged into Facebook already, the account you are logged into will be authorized. Otherwise, there will be a pop up window asking you to please log into the appropriate account and grant permission.

If you accidentally authorize the wrong Facebook account, just follow the simple instructions for changing accounts in the online help manual.

Authorizing a Twitter Account

Authorizing a Twitter account is almost exactly the same as Facebook.

- Make sure that you are either logged into the Twitter account you wish to authorize or are not logged into Twitter at all.
- Click the “Connect to Twitter” button.

The only difference between Twitter and Facebook is that you will be redirected to a new web page to authorize Twitter. As soon as you’re done, you will return to the page you were on in our system.

Configuring an RSS Feed

Before posting your RSS Feed content, you will need to configure some RSS Feed categories and distribute the URL of your RSS feed to your potential subscribers. Configuring an RSS Feed is actually quite simple and this tutorial will show you how.



Note: If you are interested in using the RSS Feed feature to instantly notify staff of emergency situations, you may be interested in installing the SchoolMessenger Desktop Alert software on staff computers. When you send an RSS Feed item to a Desktop Alert category, a window with the message will pop up on computers running the Desktop Alert software. Configuring Desktop Alert is as simple as any other RSS Feed category. Ask your SchoolMessenger representative for more information.

Creating Feed Categories

RSS Feeds, like news bulletins, are organized into categories which recipients can subscribe to. Your categories can be as broad or as narrow as you like. For example, you could also create categories by topic, such as "Sports", "Arts", or "Academic Opportunities" to be used across your entire district or specialized categories by school, such as "Springfield HS Sports News". You'll be able to combine several categories into a single RSS feed when you create a feed URL and your subscribers will be able to enjoy filtering posts by their interests in their RSS readers at the same time.

Setting up Categories

- Click the *Admin* tab followed by the *Settings* subtab, then click on *Feed Categories* in the Features section of the page.
- Enter a category name and description, for example "Sports" and "Sports news for Springfield HS".
- Click the "Add New Category" button for any additional categories.
- Click *Save* when you are done.

Generating an RSS Feed URL & Widget

Subscribers will use the URL you generate to subscribe to your RSS Feed. After you generate your feed URL, you can continue on to create a Javascript RSS widget for your web site which will display the posts in your feed as they occur.

Generating a URL

- Click the *Broadcasts* tab followed by the *Posts* subtab. Then click on the *Generate Feed URL/Widget* button at the top of the My Posts window.
- Select which categories this feed should include and configure the display options.
- Click the *Next* button. You will see the URL for your RSS Feed. This URL should be copied and distributed to potential subscribers. You can stop here or continue to generate a widget that can be pasted into your web site.

Generating a Display Widget

- Continuing from the instructions in the previous section, you should click the *Next* button to configure the Display Widget.
- Simply configure the appearance of the widget and click the *Generate Preview* button to get a feel for how it looks along the right side of the screen. The RSS Feed post that you sent earlier will be displayed in the preview, assuming your feed covers the same category as your post.
- Click the *Next* button to generate the JavaScript code for your web page. You will see the URL and the JavaScript snippet to paste into your web page. It's not saved anywhere so make sure you copy and paste it into another document. Otherwise, you can come back and regenerate the URL and code at any time.

Broadcast Templates

Broadcast Templates let you create reusable Broadcasts in which only some of the components are included. You can create Templates for emergencies or any other type of Broadcast which you might send more than once, but not frequently enough to warrant a Repeating Broadcast.

You can create templates of any shape and size. For example:

- If you have a few separate lists including a couple of lists made from your Address book with another list made from rules and you know you want to contact this odd grouping of lists more than once with different messages, you might consider making a Template which contains only your group of lists.
- You can also prepare for future weather emergencies by creating a Template with a district-wide list and weather emergency message.

Create a Template

- Click the *Broadcasts* tab followed by the *Templates* subtab.
- Click the *Add New Template* button.
- Add any combination of components and click *Save* when you're done.

Add Your Template to Your Dashboard

Simply click the *Show on Dashboard* link next to your Template on the Broadcast Templates page.

Use Your Templates

On the Dashboard, just click the Template. Alternatively, click the *New Broadcast* link next to your Template on the Broadcast Templates page. Both work exactly like clicking the *New Broadcast* button, only the new Broadcast will be populated with content from the Template.

Dashboard | **Broadcasts** | Reports | System | Admin

Lists | Messages | Broadcasts | **Templates** | Posts | Surveys | Responses

Template Editor: School Closure

Template Editor

Name Guide

Description

Type/Category ☒ Emergency
☐ Attendance
☐ General
☐ Newsletter

LIST(S)

Lists ☒ All District
☐ Board of Trustees
☐ Field Trip Survey
☐ Madison Middle
☐ My Staff
☐ Springdale HS
☐ Student Council

List Name	Count
All District	16583
Total	16583

MESSAGE

Message ▼

Phone SMS HTML Email Plain Email Facebook Twitter Feed Page Page Media

English ☒ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Spanish ☒ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Save Cancel

Repeating Broadcasts

If you have a Broadcast that should occur regularly during the week, such as Attendance, you should create a repeating Broadcast. Repeating Broadcasts can be scheduled to occur at a certain time any or every day of the week.

IMPORTANT: *Never use Repeating Jobs for one-time Broadcasts, such as Open House reminders, or Back-to-School Night. Those kinds of Broadcasts are perfect for saved messages or Templates. Repeating jobs are intended for regularly scheduled messages, like attendance.*

Create a Repeating Broadcast

- Create a list and message.
- Click the Broadcasts tab followed by the Broadcasts subtab.
- In the My Repeating Broadcasts section, click *Add New Repeating Broadcast*.
- Enter a name for the Broadcast and select its type.
- Specify the days and times that the Broadcast should automatically launch.
- Select the list and message to use, and set any other relevant job options. Then click Save.

Repeating Broadcast Editor: New Broadcast

Broadcast Information

Name [Guide](#)

Description

Type/Category ☐ Emergency ☒ Attendance ☐ General ☐ Newsletter

Repeat ☒ Su ☐ Mo ☒ Tu ☒ We ☒ Th ☒ Fr ☐ Sa Time

Days to Run

Start Time

End Time

LIST(S)

Lists ☒ Advanced List ☐ All District ☒ Attendance ☐ Board of Trustees ☐ FieldTripSurvey ☐ Madison Middle ☐ My Staff ☐ Springdale HS ☐ Student Council

List Name	Count
Attendance	0
Total	0

Skip Duplicates ☒

MESSAGE

Message

Phone SMS HTML Email Plain Email Facebook Twitter Feed Page Page Media

English ☒ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Spanish ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

SOCIAL MEDIA OPTIONS

Facebook Page(s) [Renew Facebook Authorization](#)

Twitter Authorization [Add Twitter Account](#)

Feed categories ☐ Academic Opportunities ☐ Arts ☐ Sports

ADVANCED OPTIONS

Auto Report ☒

Personal Caller ID

Max Attempts

Allow Reply ☒

Allow Confirmation ☐

[Save](#) [Cancel](#)

Important: *Be sure that your data will upload in time to populate the list that the job will be using.*

Using Telephone-only Access to Create and Initiate a Job

The *Telephone Remote Access* feature allows authorized users to record messages and create Broadcasts without the need of a computer. These steps have been made into a printable pocket guide (see *Telephone Remote Access Pocket Guide* in Appendix A).



Note: Before calling into the system you will need your Telephone User ID# and Telephone PIN Code. These can be accessed and modified using the My Account button located in the top right corner of the window.

1. Dial the system phone number (If you don't know the system phone number you can view it by clicking the Account link in the upper right corner of your screen).
2. Follow the prompts to record and save your message.
3. Press 1 to begin selecting options for this notification job.



Note: If you hang up at this point, your message will be saved and can be used in jobs created via the web interface.

4. Select the list you want to call. Each list that you've previously created is read to you by the system. When you hear the list that you want to select simply press the number of that list.
5. Select the type of Broadcast you are sending. Each type is read to you by the system. When you hear the job type that corresponds with your notification simply press that number.



Note: The "Emergency" job type should only be selected for Broadcasts that fit the criteria set by your system administrator for an emergency notification.

6. Select the maximum number of days you want to allow for your Broadcast to run.
7. Review the default call time window for this Broadcast. Press 1 to accept the defaults or press 2 to modify the call time settings.
8. Listen to the confirmation menu to ensure that you selected all the correct options for your Broadcast.
9. When the confirmation message completes press 1 to submit your Broadcast, or follow the prompts to make any corrections. If you submit your Broadcast and then find that you need to make a change to it, you can modify or cancel the job using the web interface through your online account.

Creating an Individual Contact History Report

The following section demonstrates how to create a specific report for an individual, such as calls over a date range or calls to a particular phone number.


The screenshot shows the 'Contact History' report creation interface. It features a teal header bar with the word 'Options'. Below this, there are three radio buttons for 'Search By': 'ID Number' (selected), 'Phone', and 'Email'. A 'Search Value' field contains the text '102929376'. Under the 'FILTER BY' section, there is a 'Date Options' dropdown set to 'Date Range(inclusive)', with 'From' and 'To' date pickers showing '05/01/2012' and '06/01/2012' respectively. A 'Filter by Broadcast type' checkbox is checked. Below this, 'Broadcast Types' are listed with checkboxes: 'Emergency' (unchecked), 'Attendance' (checked), 'General' (unchecked), 'Survey' (unchecked), and 'Newsletter' (unchecked).

- Click on the *Reports* tab, and then click the *Contact History* link.
- Enter the search criteria for the report. You must enter at least one of the following: *ID#*, *phone number* or *email address*.
- Enter optional filter criteria to narrow your search results.
- When you have completed your selections click the *View Report* button to display the results.

For additional information on Reports, including saving and scheduling reports based on notification results (for example, a list of all of the *Disconnect* results for the last month) please visit online *Help* and click the *Reports* link in the *Contents* section on the Help menu.

Appendix A: Telephone Remote Access Pocket Guide

The *Telephone Remote Access Pocket Guide* is intended to serve as a quick reference that you can print and carry with you in order to allow you to initiate a call out in the event that you do not have access to a computer or the Internet.

 **Important:** *It is recommended that you DO NOT write your Telephone User ID# and Telephone PIN Code on the pocket guide. Doing so would allow anyone who might come into possession of your pocket guide to initiate a callout to any list that you've created.*

SchoolMessenger Remote Telephone Access Pocket Guide		
1. Dial the system phone number:	6. After you listen to your recording press 1 to save it in the system, press 2 to replay your message, or press 3 if you need to re-record your message.	11. Select the number of days you want to allow for your job.
2. Enter your User ID at the prompt and press pound (#).	7. Press 2 to record your message in alternate languages or press 1 to continue.	12. To accept your default call time settings press 1 . To change the call time settings press 2 and follow the prompts.
3. Enter your PIN code and press pound (#).	8. Press 1 to begin selecting options to create a job for your message.	13. Confirm that your job's information is correct and press 1 to submit your job or follow the prompts to make any corrections.
4. Press 1 to begin recording your default message.	9. You will be given an option for each list currently saved on your account. Just press the number of the list you want to use .	<i>If you submit your job and then find that there was an error, you can cancel the job using the web interface.</i>
5. Press any button to stop recording.	10. Select the number that corresponds to the type of job you are sending.	