

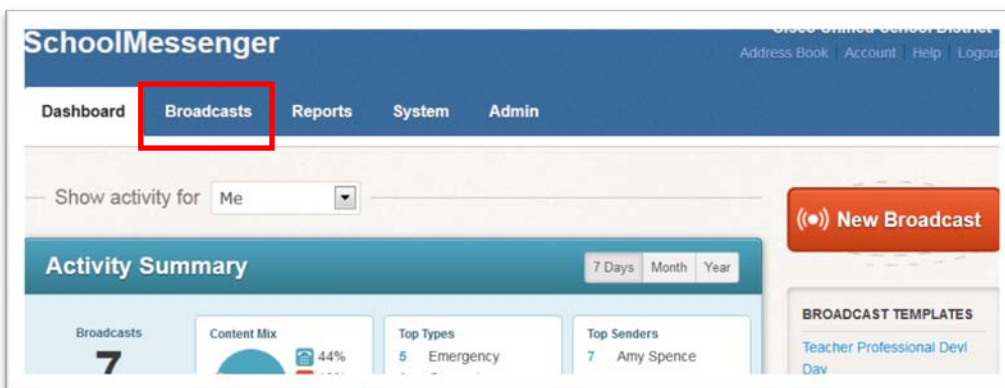
## Adding New Lists

The first step in sending a broadcast is to create a list of people who will receive it. Most lists you create will update automatically each time new data is imported into your account. For most customers this occurs each day. That means that lists can be used over and over, and they will always stay current. For example, if you create a list of all of your students you can reuse that list forever, since any adds/drops/changes will automatically be reflected in the list with each data upload to your account. In other words, you shouldn't need to create a new list each time you send a new job. Follow the steps below to create a simple rules based list:

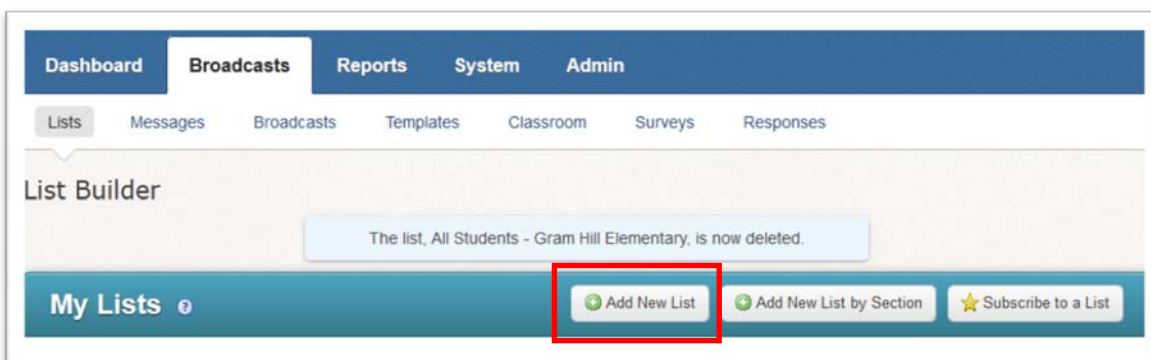
### Adding a New List

Adding a list is simple.

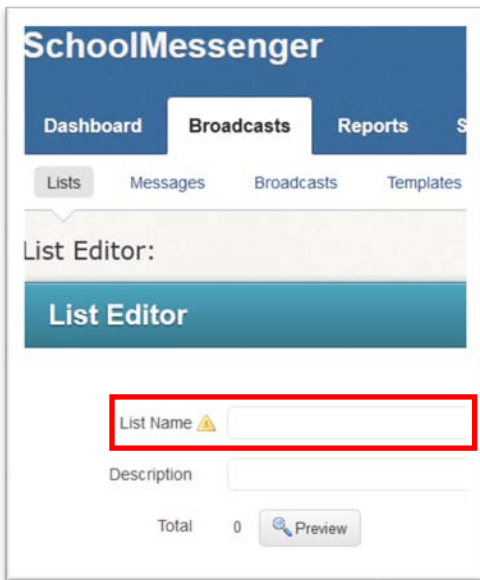
1. Click the *Broadcasts* tab.



2. From the List Builder, click the *Add New List* button.



3. You are now in the List Editor. Enter the name for your list. (For example, "All Students" or "Staff"). Be sure the list name describes who is in it – not the type of message you are planning to send.



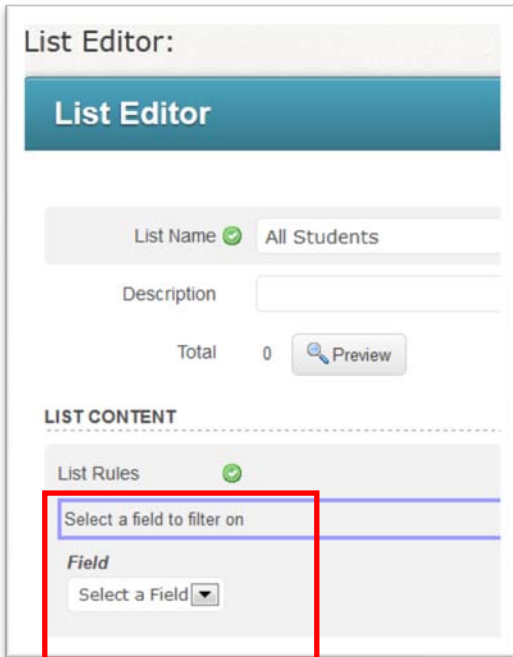
The screenshot shows the SchoolMessenger interface. At the top, there is a navigation bar with 'Dashboard', 'Broadcasts', and 'Reports'. Below this is a sub-navigation bar with 'Lists', 'Messages', 'Broadcasts', and 'Templates'. The main content area is titled 'List Editor:'. Below this, there is a blue header for 'List Editor'. The 'List Name' field is highlighted with a red box and contains a warning icon. Below it is a 'Description' field. At the bottom, there is a 'Total' field showing '0' and a 'Preview' button.

### Adding Rules to Your List

One of the easiest ways to add a group of people to your list is by defining rules. Rules allow you to define groups of people who meet certain criteria. For example:

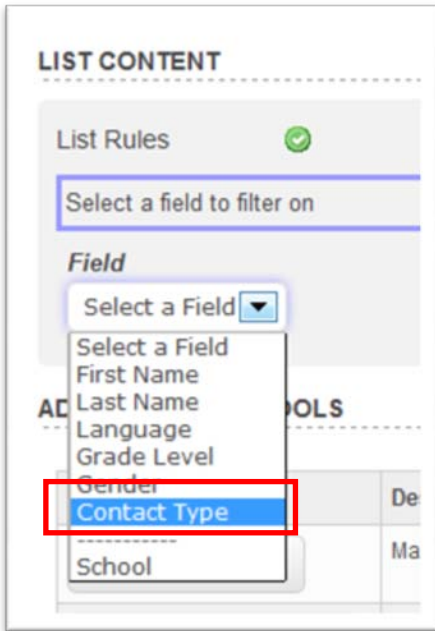
- All Students
- Students in a specific grade
- Only Staff

1. Click on the *Select a Field* drop-down menu. We'll create a list of **All Students**.

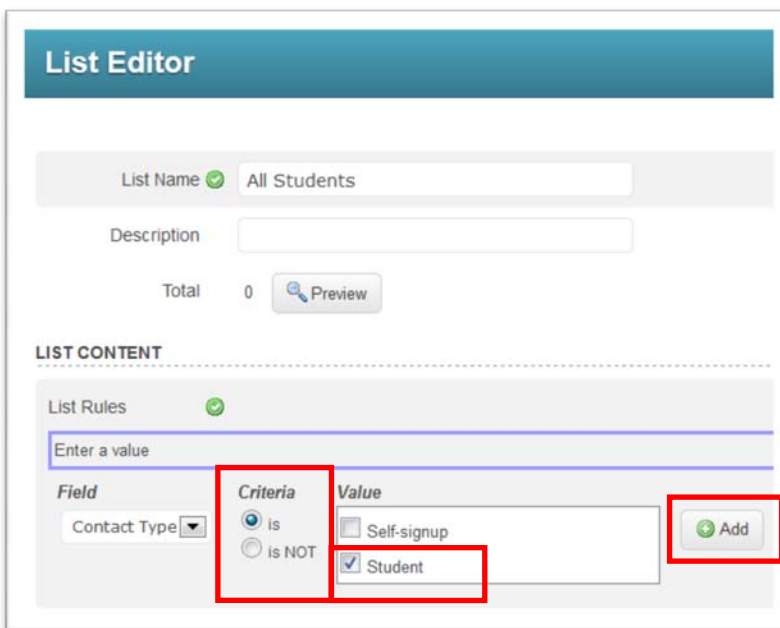


The screenshot shows the 'List Editor' interface. At the top, there's a header 'List Editor:' and a blue bar with 'List Editor' in white. Below that, there's a form with 'List Name' set to 'All Students' and a green checkmark. There's a 'Description' field and a 'Total' of 0. A 'Preview' button is visible. The 'LIST CONTENT' section is below, with 'List Rules' and a green checkmark. A red box highlights the 'Select a field to filter on' dropdown menu, which is currently set to 'Field' and 'Select a Field'.

2. Select *Contact Type* from the drop-down menu.



3. Select *Criteria is*.
4. Choose *Student*
5. Click *Add*



6. Confirm that the *Total* count is similar to the total number of students in your school.

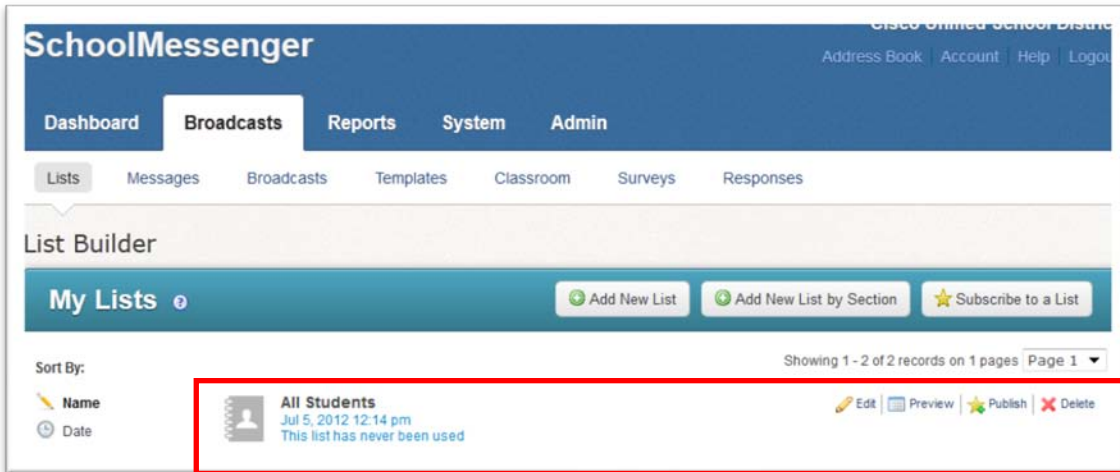
The screenshot shows the 'List Editor' interface. At the top, there is a header 'List Editor' in a blue bar. Below it, the 'List Name' is set to 'All Students' with a green checkmark. The 'Description' field is empty. The 'Total' count is displayed as '16580' and is highlighted with a red box. To the right of the total is a 'Preview' button with a magnifying glass icon. Below this is a section titled 'LIST CONTENT' with a dashed line separator. Under 'LIST CONTENT', there is a 'List Rules' section with a green checkmark and a 'Remove All Rules' link. A rule is defined as 'Rule #1' with 'Contact Type' selected in a dropdown, followed by 'is' in a dropdown, and 'Student' in another dropdown. A 'Remove' button with a red 'X' icon is to the right. Below the rule is a text prompt: 'To add another filter rule select a field'. Underneath is a 'Field' section with a dropdown menu labeled 'Select a Field'.

7. Click the *Done* button at the bottom of the page.

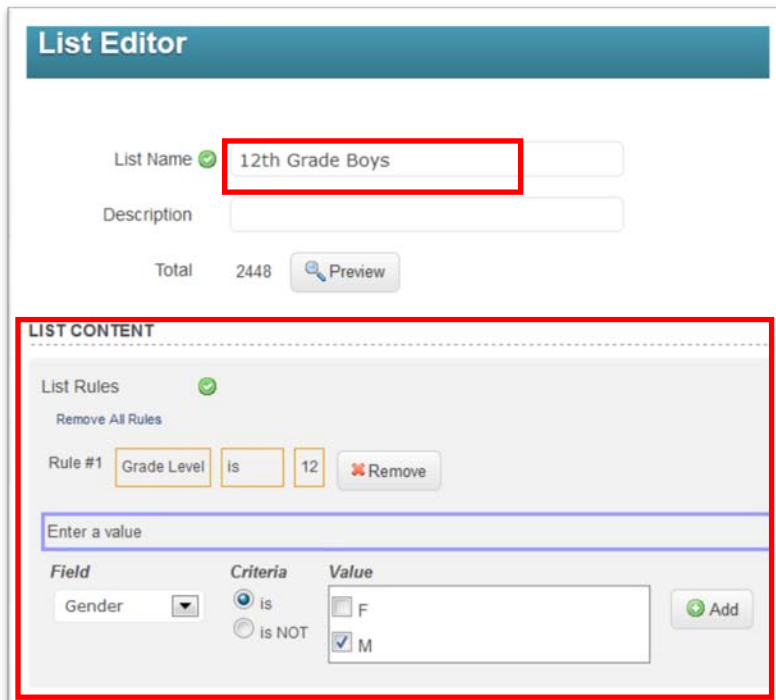
This screenshot shows the same 'List Editor' interface as above, but with an additional section at the bottom titled 'ADDITIONAL LIST TOOLS' with a dashed line separator. This section contains a table with two columns: 'Tool' and 'Description'. The tools listed are: 'Enter Contacts' (Manually type in new contacts), 'Open Address Book' (Choose from contacts you manually typed in), 'Quick Pick' (Search for people by name, ID#, email, or pt), 'Search by Rules' (Search the shared system contact database), and 'Upload List' (Upload a list of contacts using a CSV file). At the bottom of the page, there are two buttons: 'Refresh' and 'Done'. The 'Done' button, which has a green checkmark icon, is highlighted with a red box.

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

8. Your *All Student List* is now saved and can be viewed or edited under the Broadcasts → Lists menu.



9. You can continue to build lists using Rules by following the same steps above. You also can use multiple rules to build a list. For example, to create a list of 12<sup>th</sup> Grade Boys:
  - a. From the Lists page, click Add New List.
  - b. In the List Editor, from the Rules Drop Down menu, choose Grade is 12, and click *Add*
  - c. Choose another field; in this case, Gender is M. Click *Add*.
  - d. Then click *Done* at the bottom of the page



### Additional List Tools

Creating a list using rules assumes you want to grab a group of people based on specific criteria. You can also create lists using the *Additional List Tools*.

1. From the Broadcast ➤ List Builder page, click *Add New List*.
2. On the *List Editor* page, name your list just as you did when adding rules.

### Manually Entering Contacts

1. Click the *Enter Contacts* button.

The screenshot shows the 'List Editor' interface. At the top, there's a teal header with the text 'List Editor'. Below it, there's a form with a 'List Name' field containing 'More Tools' and a green checkmark icon. A 'Description' field is empty. Below that, it says 'Total 0' and a 'Preview' button with a magnifying glass icon. A dashed line separates the 'LIST CONTENT' section. Under 'LIST CONTENT', there's a 'List Rules' section with a green checkmark icon and a text input field containing 'Select a field to filter on'. Below that is a 'Field' dropdown menu with 'Select a Field' selected. Another dashed line separates the 'ADDITIONAL LIST TOOLS' section. This section contains a table with two columns: 'Tool' and 'Description'. The 'Enter Contacts' tool is highlighted with a red box. Below the table are 'Refresh' and 'Done' buttons.

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

2. Enter the individual's contact information into the appropriate fields. You may also choose how this person is contacted based on the notification type preferences by checking the appropriate boxes.
3. Add *Email* and *SMS Text* phone number information as required.

The screenshot shows the 'Address Book Editor' interface for adding a new contact. The form is titled 'Address Book: New Contact' and 'Address Book Editor'. It contains the following fields and options:

- First Name: Susan
- Last Name: Smith
- Language Preference: English (dropdown menu)
- Address Line 1: (empty)
- Address Line 2: (empty)
- City: (empty)
- State: (empty)
- ZIP Code: (empty)
- PHONE SETTINGS**
- Phone 1: 888-527-5225
- Phone 1 Preferences:  Emergency,  Attendance,  General,  Survey
- Phone 2: 888-920-3897
- Phone 2 Preferences:  Emergency,  Attendance,  General,  Survey

4. Click the *Done* button at the bottom of the screen to add this person to your list.

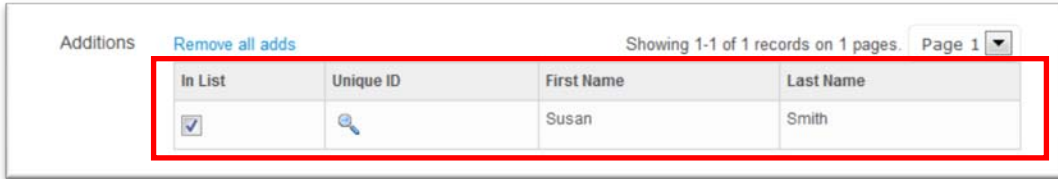
The screenshot shows the 'ADDITIONAL LIST TOOLS' section, which is a table with two columns: 'Tool' and 'Description'. The tools listed are:

Tool	Description
<input type="button" value="Enter Contacts"/>	Manually type in
<input type="button" value="Open Address Book"/>	Choose from co
<input type="button" value="Quick Pick"/>	Search for peop
<input type="button" value="Search by Rules"/>	Search the shar
<input type="button" value="Upload List"/>	Upload a list of

At the bottom of the section, there are two buttons: 'Refresh' and 'Done'. The 'Done' button is highlighted with a red box.



- This will also add the person to your personal *Address Book*. You can add this individual to future lists by simply using your Address Book.



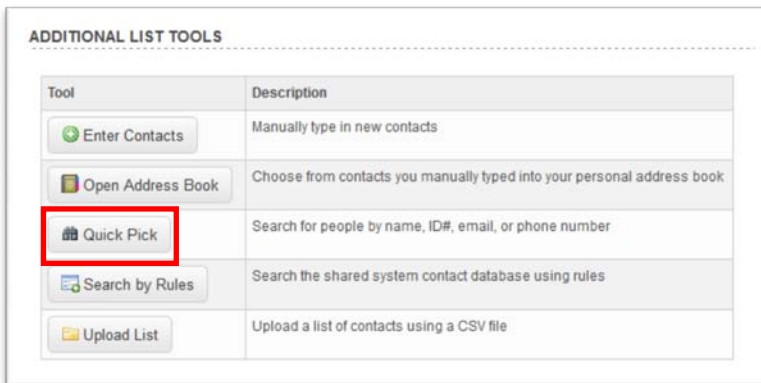
In List	Unique ID	First Name	Last Name
<input checked="" type="checkbox"/>		Susan	Smith

- 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 window, then click the Refresh button.]*

### 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.

- Click the *Quick Pick* button located in the *Additional List Tools* section to access the *List Search* screen.



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

- 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.

List Search: More Tools

### Search Options

Search Options

Search by Rules  
 Search for Person  
 Show All Contacts  
 Search by Sections

Search

### Search Results

Sort By: Last Name | First Name | - None -

Show/Hide Fields

In List	Unique ID	First Name	Last Name	Destinations
<input type="checkbox"/>	108642	Amairani	Baker	1 phone, 1 email, 0 sms
<input type="checkbox"/>	109672	Jeannette	Baker	2 phones, 1 email, 0 sms

- Select the individual for your list by checking the checkbox next to their name.

### Search Results

Sort By: Last Name | First Name | - None -

Show/Hide Fields

Showing 1-5 of 5 records on 1 pages. Page 1

In List	Unique ID	First Name	Last Name	Destinations	School
<input type="checkbox"/>	108642	Amairani	Baker	1 phone, 1 email, 0 sms	Norwalk High School
<input checked="" type="checkbox"/>	109672	Jeannette	Baker	2 phones, 1 email, 0 sms	Norwalk High School
<input type="checkbox"/>	1003761	Donavan	Baker III	1 phone, 1 email, 0 sms	Santa Cruz Elementary

- Click *Done* to save your changes or continue building your list.

- To remove individuals from your list, simply uncheck the box next to the individual's name. Then click *Refresh*.



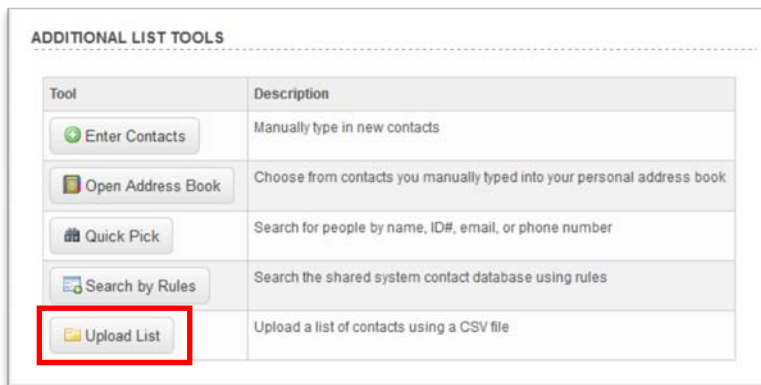
Additional information: Additions Remove all adds Showing 1-2 of 2 records on 1 pages. Page 1

In List	Unique ID	First Name	Last Name
<input checked="" type="checkbox"/>	109672	Jeannette	Baker
<input checked="" type="checkbox"/>		Susan	Smith

### Uploading CSV File Lists

*Upload List* allows you to create a list of contacts by uploading a *Comma Separated Value (CSV)* text file.

- Click *Upload List*.



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
<b>Upload List</b>	Upload a list of contacts using a CSV file

2. Choose your *Upload Type*. SchoolMessenger can work with CSV files in two formats:
  - a. Contact Data
  - b. Id# Lookup

**Upload List: More Tools**

Preview Cancel

### Upload Call List File

Upload Type:

Contact data: File format must be a Comma Separated Value (CSV) with headers, destinations, and insertable fields for use in messages.

ID# lookup: File must be a list of ID#s only (one per line)

Upload File:  Browse...

Please select a file to upload and then click Preview to continue.

Preview Cancel

3. Browse to select the file you wish to upload.

**Upload List: More Tools**

Preview Cancel

### Upload Call List File

Upload Type:

Contact data: File format must be a Comma Separated Value (CSV) with headers, destinations, and insertable fields for use in messages.

ID# lookup: File must be a list of ID#s only (one per line)

Upload File: C:\Users\Amy\Desktop\Upload CSV Browse...

4. Click *Preview* to view the file data.

**Upload List: More Tools**

**Upload Call List File**

Upload Type:  Contact data: File format must be a Comma Separate destinations, and insertable fields for us  
 ID# lookup: File must be a list of ID#s only (one per

Upload File: C:\Users\Amy\Desktop\Upload CSV

5. Contact Data - Your list contains the complete information for recipients in the following order: First Name, Last Name, 10-Digit Phone Number, Email Address (optional). From the dropdown menus, select which field the phone and email information should be mapped to. For example, if all of the phone numbers should go in the Phone 1 field, select Phone 1 from the dropdown menu.

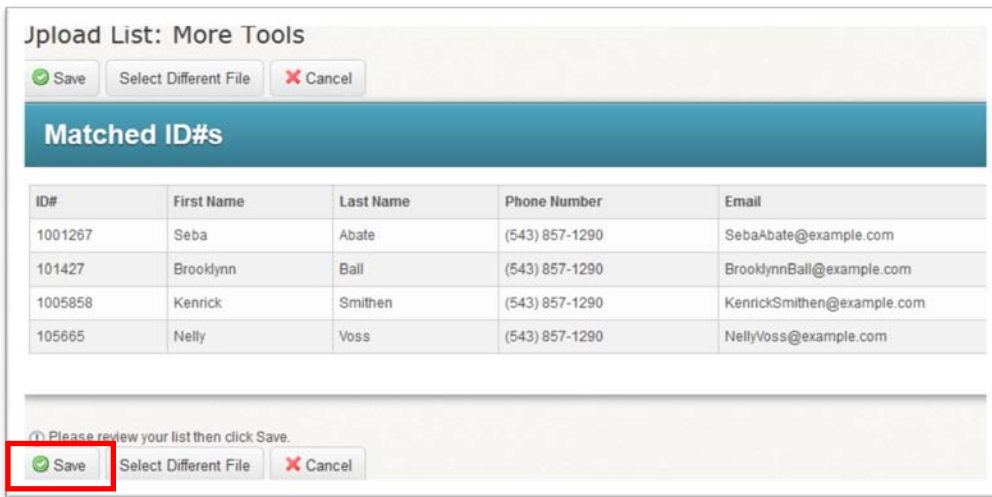
**Upload List: More Tools**

**Upload Preview**

First Name	Last Name	Phone 1	Email 1
Sally	Smith	(888) 920-3897	ssmith@paradisetraining.com

6. ID # Lookup - Your list only contains the ID numbers for your recipients as they exist in your database. The system will match the recipient's contact information already stored in the system based on this number.

- If your uploaded list looks correct, click the *Save* button. If you need to upload a different file, click the *Select Different File* button. If you would like to exit without saving your list, click the *Cancel* button.



- Once you are back on the *List Editor* page, review your list to make sure you have the recipients you want.
- Click *Done* to save your list and return to the *List Builder* page.

