New Communicate Dashboard Guide





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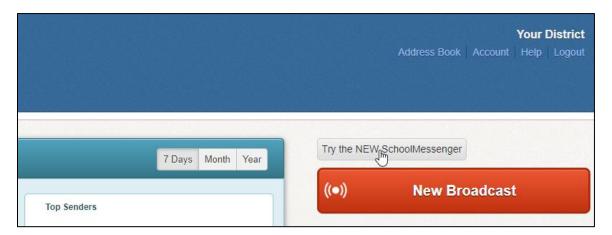


Introduction

This guide is for the new Communicate dashboard. The new dashboard streamlines and simplifies the process of creating

Accessing the New Dashboard

Once you have logged into your Communicate account, you can access the new dashboard by clicking **Try the NEW SchoolMessenger** button above **New Broadcast** on the right side of the page.



Dashboard Overview

On the new Dashboard, you will find a number of options.

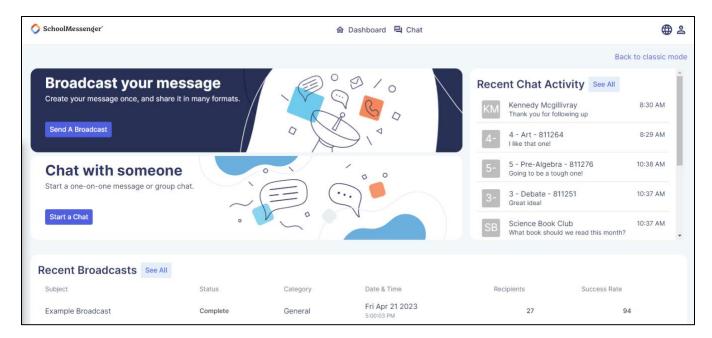
You can use Send a Broadcast to create a broadcast.

To begin a chat, click Start a Chat.

Across the top of the page you will also find links to switch between the **Dashboard** page and the **Chat** page.

You will also find a icon that allows you to view the dashboard in other languages and a icon to access your Account, Address Book, Help and Log Out links.





If you want to switch back to the original dashboard, click **Back to classic mode**.

Recent Chat Activity

On the Dashboard there is a section to display your most recent chats. Presently the Recent Chat Activity is empty, but you can click **See All** to jump to the Chats page. In a later build, your recent chats will be listed here).

Recent Broadcasts

On the Dashboard there is a section to see Recent Broadcasts.



The **Subject**, **Status**, **Category**, **Date & Time**, **Recipients** and **Success Rate** for your recent broadcasts will be displayed. The **Success Rate** will show the percentage of broadcast messages that have been successfully delivered to the intended recipients.

If you want to see the rest of your broadcasts, click **See All**. This will switch you back to the old Communicate interface to view all of your broadcasts.

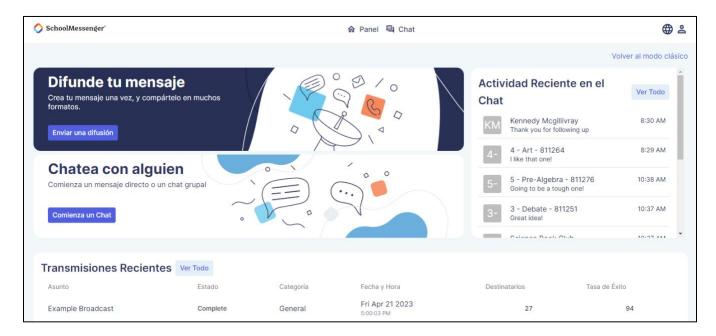


Translations

The new Communicate interface is available in English, Spanish and French. To change the language of your interface, click the icon.



Choose between English, Español, or Français.



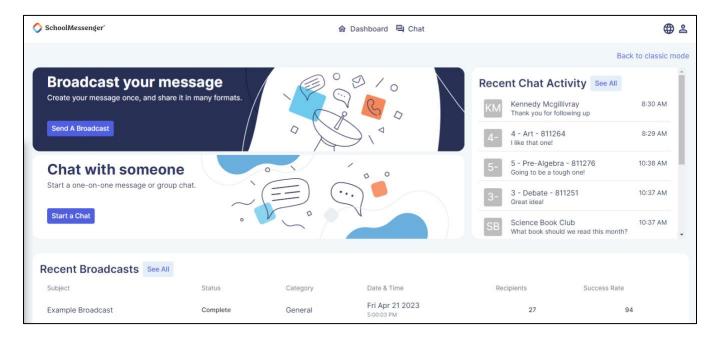
Account Settings

When you click the icon, you will see links for Account, Address Book, Help and Logout. The Account, Address Book links will take you to the corresponding section from the classic Communicate interface. The Help link will take you to the online documentation for the classic Communicate interface. The Logout link will log you out of your current session.



Broadcasts

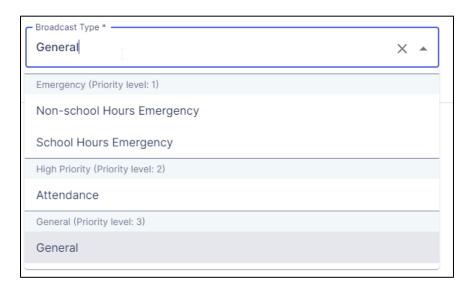
To create a new broadcast, click **Send a Broadcast** on the dashboard.



Broadcast Settings

Title your broadcast by filling out the Enter Broadcast Name.

Click the **Select Broadcast Type** dropdown to choose your broadcast type.



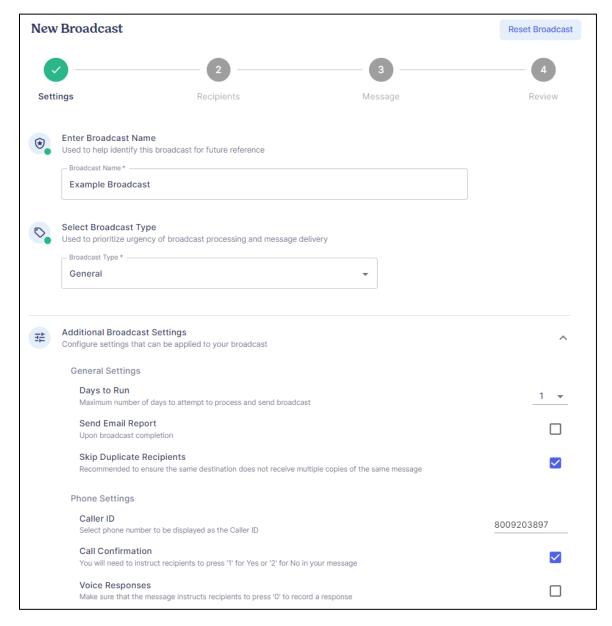
PNote: The Broadcast Type field is also searchable, which can be useful if you have a large number of Broadcast Types.



Additional Broadcast Settings

If you expand the Additional Broadcast Settings you have the option to configure the following settings:

- Days to Run: Choose the maximum number of days the broadcast should try to run.
- Send Email Report: Choose whether to send an email report to yourself after the broadcast has been sent.
- **Skip Duplicate Recipients**: Choose whether to skip duplicate recipients being contacted for a broadcast. This is enabled by default.
- Caller ID: Set the phone number that should be displayed to broadcast recipients.
- Call Confirmation: Prompt call recipients to confirm the broadcast.
- Voice Responses: Give call recipients the option to record a response.



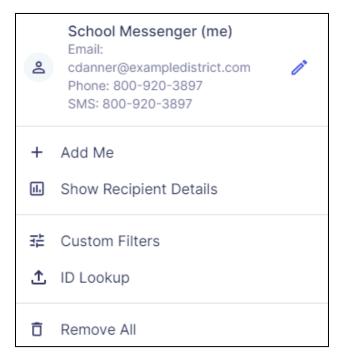
After you have configured your broadcast settings, click Next.



Broadcast Recipients

In the next section, you are able to choose the recipients for your broadcast.

If you wish to send the broadcast to yourself, click and choose Add Me.

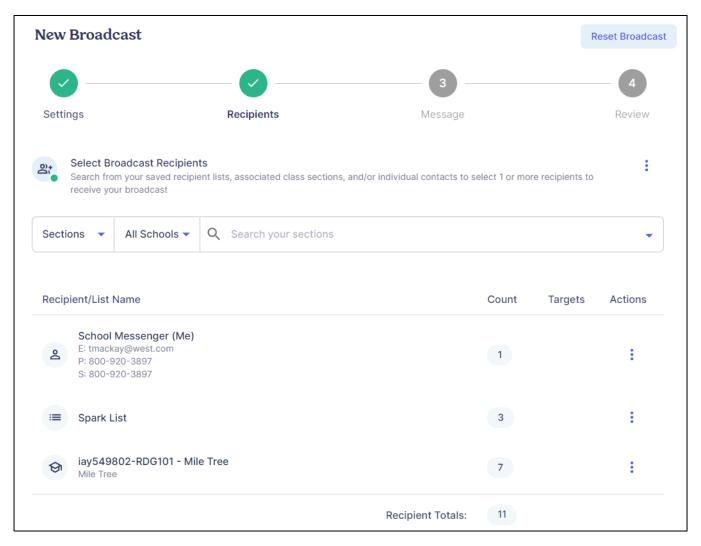


Recipient Types

You can choose three different recipient types from the **Select Broadcast Recipients** dropdown. You can add recipients from multiple recipient types:

- Lists: Choose to search and add recipients from All Lists, My Lists or Subscriptions.
- Sections: Choose to search and add recipients from All Schools or specific sections.
- Contacts: Choose to search and add recipients from All Schools or specific schools.





After choosing your recipients, click Next.

Broadcast Message

Default Message

Fill out the **Default Message** that will be the default message used for your English messages for email, TTS and SMS messages sent in the broadcast.

Inserting Fields

If you wish use dynamic recipient data, such as the recipient's first name, in your message, click **Insert Field** where you wish to add the field in the message.

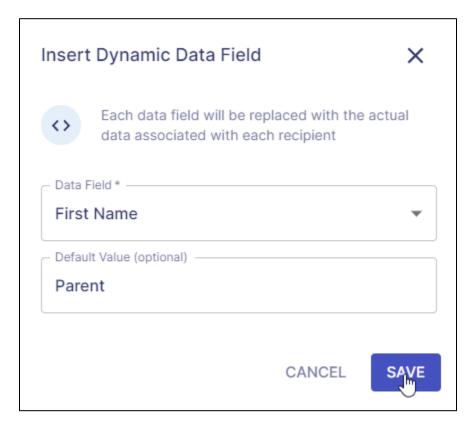
Click the Data Field dropdown.





Choose the field you wish to include in your message.

After choosing your Data Field, you can also set a **Default Value** if you wish. This will be used in the field in the event there is no data for the recipient for that particular field.



Click Save to insert your field into the editor.

Using Broadcast Editor

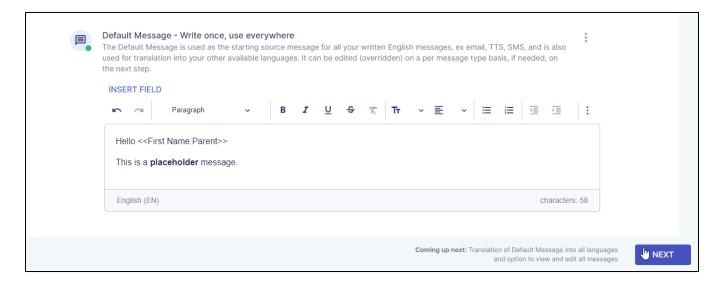
The following editing tools are available when creating your Default Message.



lcon	Description
K	Undo: Undo your last action.
a	Redo: Redo your last action.
Paragraph	Style : Choose the tag to apply to your text. Paragraph text is normal text, whereas the three headings are used to designate different header levels.
В	Bold
I	Italicize
<u>U</u>	Underline
ક	Strikethrough
×	Remove Formatting: Remove any formatting from the current text.
Tt ~	Basic Styles: Allows you to access the Font Size, Font Family, Font Color and Text Background Color style options.
⊤T ∨	Font Size: Choose the size of the font.
A	Font Family: Choose from a list of available fonts.
<u>A</u> ~	Font Color
<u>\$.</u> ~	Text Background Color
≣ ∨	Text Alignment
⊨	Bullet List
=	Numbered List
₫	Decrease Indent
亘	Increase Indent
:	More Actions:



+ ~	More Actions: Must click this as well to access
Θ.	Link: Enter the URL for a site or page you wish to link to.
= ~	Table: Add a table. You can choose how many rows and columns to include.
_	Horizontal Line
<> Source	View Source: View the HTML for the message. You can add HTML, but unsupported HTML, such as <script> tags, will be automatically removed. You will need to switch back out of View Source before proceeding.</th></tr></tbody></table></script>



Click Next.

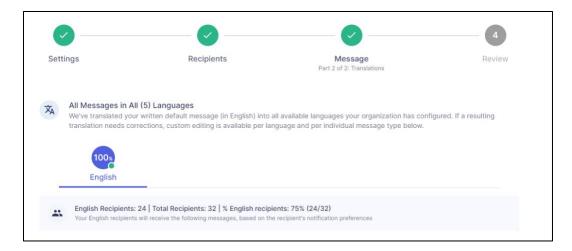
Customized Messages and Translations

On this page, you can see the Email, Phone and SMS message in each language. If you want to customize any of these messages or update any of the translations, you can do so.

Recipient and Translation Information

At the top of the page, you will see which languages the recipients are using as well as information on how many recipients are using each translation type.





*Note: On the current version of the dashboard, the recipient and translation information on this page is just an example and is not representative of your broadcast.



Email

If you wish to customize the email settings, you can update the following fields:

- From Name
- From Email
- Reply-To Email
- Subject

If you wish to update the email message in English or one of the translations, click the icon to the right of **Email**.

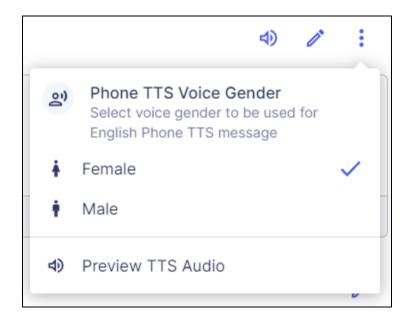


Make any changes you wish and click Save.

PNote: For information on using the editing tools, see the Inserting Fields and Using Broadcast Editor sections.

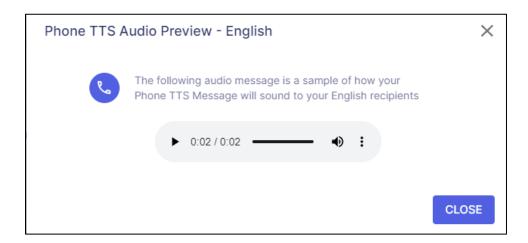
Phone

To configure the automated voice used for your broadcast, click and choose your desired gender for the message.





If you want a preview of the TTS audio for your message, choose **Preview TTS Audio** from the or click the icon.



After listening to the preview, you can click the X or Close icons to close the preview.

If you wish to update the phone message in English or one of the translations, click the or icon to the right of Phone.



Make any changes you wish. You can click **Preview** to hear the updated message. When you are happy with your changes, click **Save**.

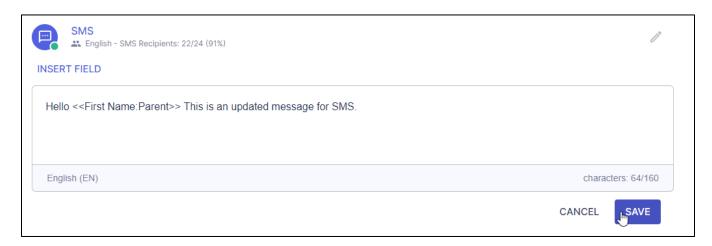
*Note: As a phone message is not going to have a visible component for the recipient, the editing tools are not available when editing your message. For information adding fields, see the Inserting Fields section.

PNote: Currently the Insert Audio Clip option is not available.



SMS

If you wish to update the SMS message in English or for one of the translations, click the oicon to the right of sms



Make any changes you wish and click Save.

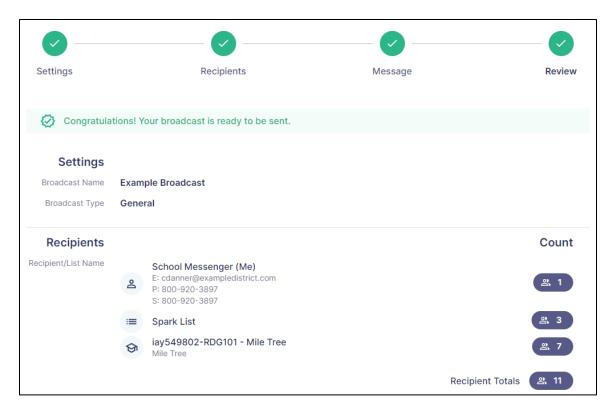
- *Note: As SMS does not support rich text, the editing tools are not available when editing your message. For information adding fields, see the Inserting Fields section.
- Phote: Your SMS message cannot exceed 160 characters in length.

Once you are satisfied with your messages, click **Next** at the bottom of the page.

Broadcast Review and Sending

The Review page will show you a summary of your broadcast message, include broadcast settings, recipients, and messages.





You can also see a summary of recipient languages and messages letting you know how many of each message type and language will be used in the broadcast.



*Note: The Recipient count at the bottom left of Recipient Languages and Messages will be accurate however the other details are not using real data at this time.

🥐 N

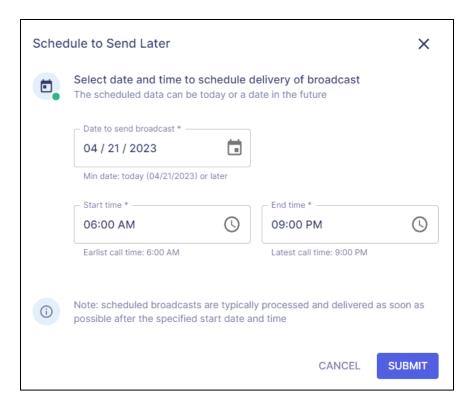
Note: The Send to Myself option is not available at this time.

Schedule a Broadcast

If you do not want your broadcast to be sent immediately, you can click **Schedule for Later**.

You can choose the **Date to send broadcast** and what the **Start time** and **End time** for your broadcast should be.





After setting your schedule, click Submit to schedule the broadcast.

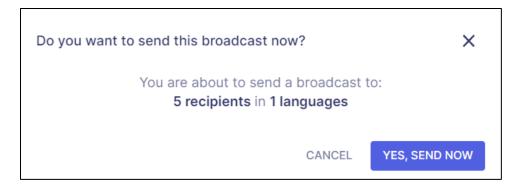
Sending a Broadcast Immediately

If you wish to send the broadcast right away, click Send Now.



You will be prompted to confirm you wish to send your broadcast.





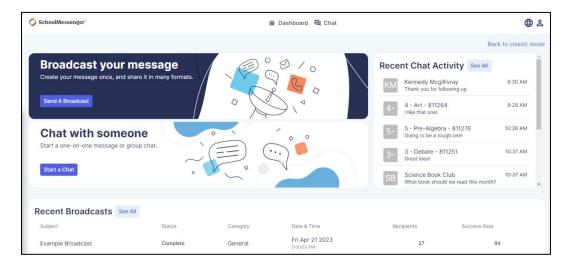
Click Yes, Send Now to begin the broadcast.

*Note: If outside of the allowed broadcast hours for the client, the message will not be sent until the earliest allowed call time.



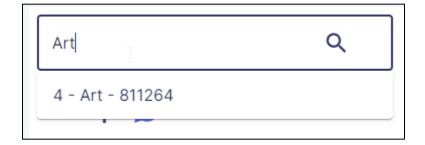
Chats

To begin a chat, click Start a Chat.



Searching Chats

To search for a specific chat you are part of you can click in the **Search...** bar. As you type in the search bar and auto-complete will show the chats that match your text.



You can choose the desired chat from the list and then it will be displayed on the page.

Group Chats

A group chat allows you to combine multiple groups, sections and/or contacts into a single chat.

Any groups you are already part of will be listed under **Groups**.



You can load an existing group chat by clicking on that chat.

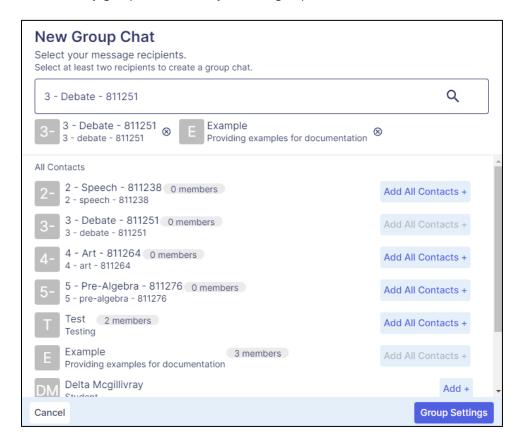


Creating a Group

To create a new group chat, click the + to the right of **Groups**.



In the **New Group Chat** window you can click **Add** to add individual contacts to your new group and you can click **Add All Contacts** to add any group or section to your new group.



To find a specific group, section or contact, click in the **Search...** bar. As you type in the search bar autocomplete will show the groups, sections or contacts that match your text.



After adding the desired groups, contacts and sections, click **Group Settings**.



Fill in a Group Name.

You can also add a **Description** if you wish.

If you do not want chat recipients to be able to respond to your messages, check Disable replies.



Click Create Group.

You will be given a code that you can share with parents and students you would like to join the group. You can click the cities icon to copy the code to your clipboard so you can then paste it to a text file or paste it when messaging contacts.



After saving your code, click Done.

Managing a Group

To manage your group, click ... to the right of the group.





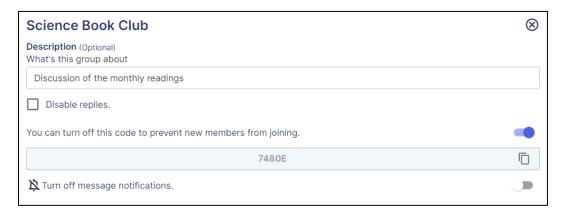
Click Manage Conversation.

You can update the group **Description** or toggle **Disable replies** on or off.

If you wish to stop new users from being able to use a code to join the group, you can disable the **You can turn** off this code to prevent new members from joining option.

If enabled, you can click the icon to copy the group code to your clipboard.

By default, you will be notified whenever messages are posted to the group. If you wish to disable those notifications, enable the option **Turn off message notifications**.



Once you have finished managing your group, click the icon to close the group management.

Section Chats

Any sections your account is part of will be listed under **Sections** on the sidebar.



You can load a section chat by clicking on that chat.

Managing a Section

To manage your section, click ... to the right of the section.

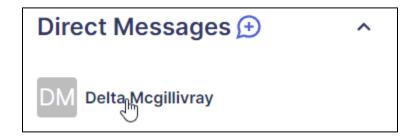




Click Manage Conversation.

Direct Messages

With Direct Messages you can have one-on-one messages with any parents or students associated with your account.



You can access any existing direct message by clicking on that user's chat.

Creating a Direct Message

To create a new Direct Message, click on the + to the right of **Direct Messages**.

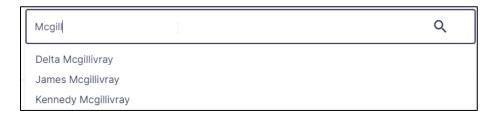


In the New Direct Message window, find the student or guardian you wish to message and click Add.





To find a specific contact, click in the **Search people by name...** bar. As you type in the search bar autocomplete will show the contacts that match your text.



After adding a Direct Message recipient click Start New Chat.



*Note: You can only select a single recipient for a Direct Message. If you wish to message more than one person at a time, you can create a group instead.

Participating in Chats

To participate in a chat, click on the Group, Section or Direct Message in the sidebar or locate the chat via the **Search** bar.

When you open a chat, you will be able to see any messages that have been exchanged in the chat.

Sending a Message

To send a message to the chat, click in the **Message** bar at the bottom of the page.



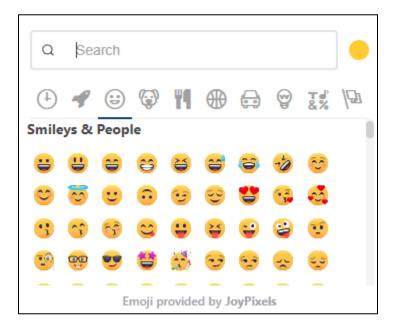
You can type your message into this box.

To send your message, you can press **Enter** or click the \checkmark icon.



Using Emojis

If you want to add an emoji to your message, click the icon.



You can click a category of icon to see different types of icons. You can choose the following categories:

- Frequently Used: Icons you regularly use will be listed here.
- **Custom**
- Smileys & People
- Animals & Nature
- Food & Drink
- Activity
- Travel & Places
- Solution
 Solution
- 🐉 Symbols
- Flags

If you know of a specific emoji you would like to use, you can also type in all or part of the name of the emoji in the **Search** bar.





Once you choose an emoji, it will show up as text in your message box (such as :smiley_cat:), but once you send the message the emoji will be displayed in the chat window.

For emojis that support skin tones, such as hand emojis, you can click on the icon to the right of the search bar and choose a preferred skin tone.



This will be used for the emoji, if applicable.

Using Formatting Tools

You have access to the following tools for your message:

lcon	Description
В	Bold
I	Italicize
5	Strikethrough
>	Inline Code : Allows you to display your message inside a formatted box. Useful for displaying code to chat recipients.
∜)	Multi-Line Code: Same as Inline Code, but with a larger box around your text.
f	KaTeX: Not used at this time.



Sending Video Messages

To create a video message to send in the chat, click the icon in the **Message** box. In order to create a video message, your computer must have a webcam.

If prompted, click **Allow** to give the application permission to use your microphone and camera.

In the recording window, click the local icon to start your recording.

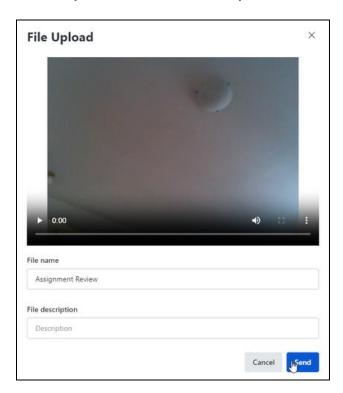


When you have finished with your recording, click the o icon to stop the recording.

Click **Send** to proceed. If you wish to discard the video, click **Cancel**.

You will then see a **File Upload** window where you can review your video.

You can also give it a **File Name** and, if you wish, add a **File Description**.



If you wish to re-record your message, click **Cancel**. If you are ready to send it, click **Send**.



Sending Audio Messages

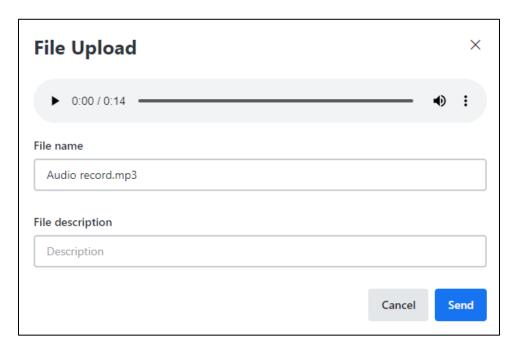
To create an audio message to send in the chat, click the $\frac{9}{2}$ icon in the **Message** box.

If prompted, click **Allow** to give the application permission to use your microphone.

Start speaking your message.

When you have finished speaking click the \odot icon. If you wish to cancel your recording, click the \otimes icon.

After clicking the \mathfrak{S} icon you will be able to preview your message.



To listen to your message, click ▶ the icon.



Note: You can click to download a copy of the file or adjust the playback speed of the preview.

If you wish you can change the **File Name** of your recording or add a **File Description**. If you change the file name do not change the .mp3 file extension.

If you wish to re-record your message, click Cancel. If you are ready to send it, click Send.

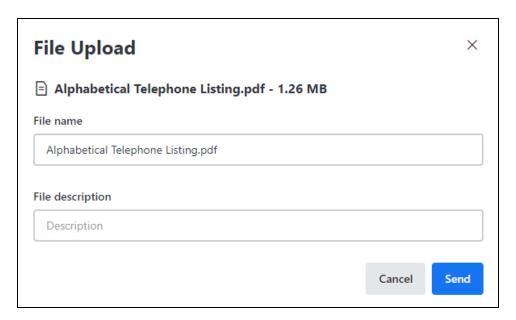
Sending an Attachment

To include an attachment in your chat, click the \emptyset icon in the message box.

Choose a file you wish to upload to your chat.

If you wish you can update the **File Name** or add a **File Description**. Be aware that if you update the file name you should not change the file extension.





Click Send to upload your file.

Responding to Messages

If you hover over a message, you will see options to respond to the right of the message.



Quoting a Message

If you want to quote the message in your response, click the 🛍 icon.

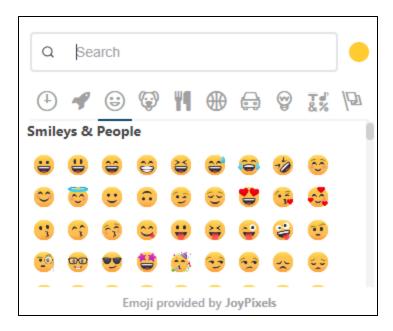
Hi, Kennedy. I would like to discuss the results of Delta's latest quiz.

Just following up on this message.

Reacting to a Message

If you add an emoji reaction, click the ei icon.





You can click a category of icon to see different types of icons. You can choose the following categories:

- Frequently Used: Icons you regularly use will be listed here.
- **Custom**
- Smileys & People
- Animals & Nature
- II Food & Drink
- Activity
- Travel & Places
- & Symbols
- Flags

If you know of a specific emoji you would like to use, you can also type in all or part of the name of the emoji in the **Search** bar.





For emojis that support skin tones, such as hand emojis, you can click on the icon to the right of the search bar and choose a preferred skin tone.



Creating a Message Thread

If you have a very busy chat or are wanting to call back to a specific older message, creating a message thread is a good idea. To create to a thread, hover over a message and click the \bigcirc icon.

A thread will open on the right side of the page.

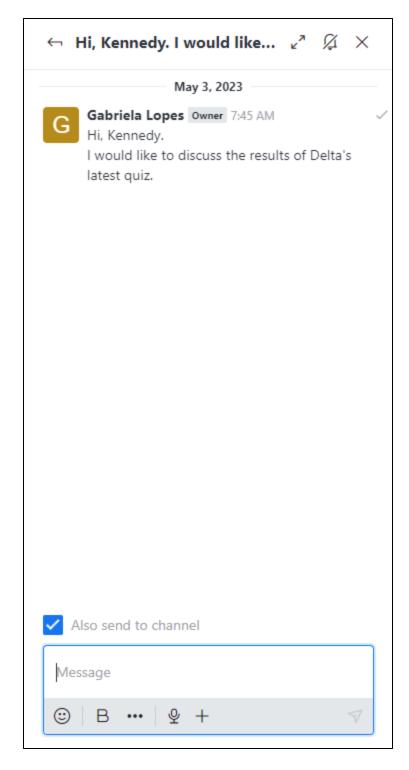
If you want to expand the thread to full size on the page, click the $\begin{cases} \begin{cases} \$

To close the thread window, click the X icon.

If you want to be notified of any updates to the thread, you can click the 🗸 icon.

If you want the message to be posted in both the thread and the main chat, check **Also send to channel**.





The same text tools are available within a thread as within the normal chat however if the thread hasn't been expanded you will need to click ••• to access some of the editing tools.

Other Actions

If you click you can choose the following options:

• Quote: For more information, see the Quoting a Message section.



- Add Reaction: For more information, see the *Reacting to a Message* section.
- Reply in Thread: For more information, see the Creating a Message thread.
- Reply in Direct Message Thread: Send a direct message to the creator of the message.
- Follow Message: Be notified of any replies to threaded replies to the message.
- Get Link: Copy a link to the message.
- Copy: Copy a message.
- Edit: Edit a message.
- **Pin**: Pin the message to the top of the chat.
- Star: Place a star next to the message to indicate its importance.
- Info: See who has viewed the message and when.
- Report: Report an inappropriate message.
- **Delete**: Delete a message.