



SchoolMessenger[®]

List Building & Troubleshooting Guide

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What is a List?

SchoolMessenger Communicate enables you to broadcast messages to your recipients (families, community members, etc.) quickly and easily. In order for the system to know whom to contact, a list must be used. Essentially, a list is a group of people that you would like to contact.

There are many methods for creating lists of contacts to use in your broadcasts, and there are many options for managing and sharing your lists. This guide will help you choose the right method for creating and managing your lists.


 **Note:** *This guide is comprehensive, meaning that it includes descriptions of nearly everything that involves list creation and management. However, you may not have access to use some of the methods or functions, depending on your account settings. If you have any questions, see the **Frequently Asked Questions** and **Troubleshooting: Common Issues FAQ** sections of this guide.*

Important Distinction: Lists Are Not the Same as Imports

It is easy to confuse imports and lists, because both can refer to your contacts in Communicate. However, there is an important difference: imports are sets of data that create system contacts, while lists are a set of contacts to use in a broadcast.

For example, you may have an import for your student demographics that establishes student contacts for your school. Those contacts were created by that import. To broadcast to those contacts, you must create a list that refers to those contacts that were created by the import.

The list contains the contacts that you will broadcast your message to, while the import is the set of data that created those contacts in the first place in Communicate.

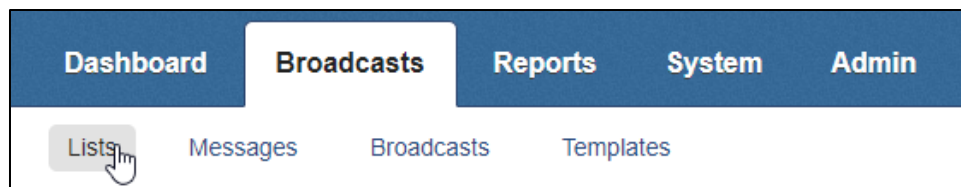
 **Note:** *Even though lists can, and most commonly do, refer to the system contacts that are created by imports, lists can also refer to contacts that are manually entered into the list itself as a separate set of contacts outside of imports, as you will learn in the **Methods for Adding Contacts to Lists** section below. These other methods do not turn lists into imports but are simply different ways to create your list from sources other than imported data.*

Creating a List – Getting Started


You can create the list in advance as a saved list that you can use more than once, or on the fly during a broadcast in the message sender. These steps will describe both methods. After choosing a method and starting your list, jump to the *Methods for Adding Contacts to Lists* section for corresponding steps.

First Steps: Creating Saved Lists

To begin creating your list, you must first navigate to the **Broadcasts** tab, and then to the **Lists** section.



Next, click the **Add New List** button.

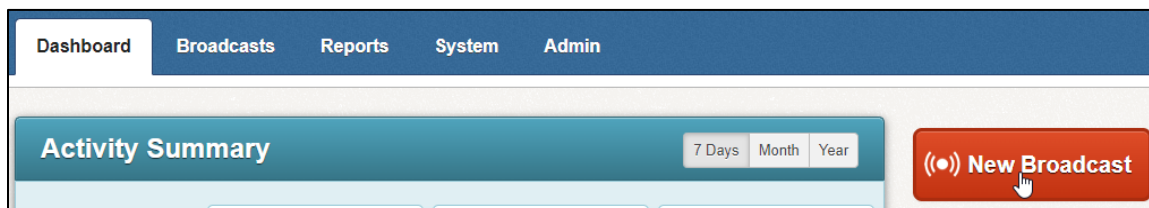
 **Note:** If your account uses Classroom Messaging and you wish to create a new list by section, see the **Create List by Section (Classroom Messaging Module Required)** part of this guide.

In the screen that appears, you must give your list a **List Name** (required) and **Description** (optional).


A screenshot of the 'Add New List' form. It contains two input fields. The first field is labeled 'List Name' with a yellow warning triangle icon next to it. The second field is labeled 'Description'. Both fields are empty and have a light grey border.

First Steps: Creating a List During a Broadcast (Message Sender)

Navigate to the **Dashboard** tab and click **New Broadcast**.




In the first page of the Broadcast, use the **Add Message Recipients** drop-down to select the method.

 **Note:** When you create lists with this method, you can use the buttons in the **Actions** column to delete the current list, save it as a saved list, or preview the contacts you selected.

Methods for Adding Contacts to Lists

Now that you have begun to create your list, you must choose a method by which contacts are added to your list as the next step. There are several ways add contacts your lists.

You can conduct these steps from the **Broadcasts** tab > **Lists** section to start a saved list, or during the creation of a broadcast in the Message Sender (**Dashboard** tab > **New Broadcast** button). See *Creating a List – Getting Started* for exact steps to get you started.

 **Note:** The following steps assume that you are either already in your **Broadcasts** -> **Lists** section after having clicked **Add a New List** or creating the list during Step 1 of a New Broadcast as initiated from the Dashboard.

Rule-Based Selection

Use rules in your list to select system contacts that have been created by imports. As long as your imports are configured (and mapped) properly, lists that you create with this method will automatically update as the imports are updated. In other words, if new students are added, or contact information changes, the list will change as soon as the import is updated. This is the most common method of creating a list.

Here are some important things to keep in mind about rule-based lists:

Rules are organized like statements. For example, if you want to create a list that contains only 8th grade students, the rule might be **Grade – is – 8**.

There are many types of fields possible in the rules, so the statement may change based on the type of data present in the field that you select. For example, if you have a field that contains a numeric value such as the students' outstanding lunch balance, and you want to broadcast to students' families if the student owes more than \$5, the rule might be **Lunch Balance – is greater than – 5**.

You can have multiple rules in a list to narrow down your results. For example, if you have an **Activity** field that includes baseball, and you want to contact parents of 6th grade baseball players, your two rules could be **Activity – is – Baseball** and **Grade – is – 6**.

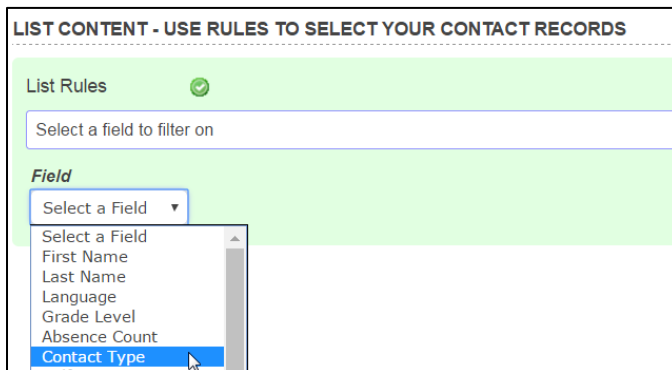
Typically, when imports are first created, a standard field called **Contact Type** is added. This refers to an entire group of contacts.

For instance, the **Contact Type** of a student demographic import is usually **Students** and includes all students in the import.

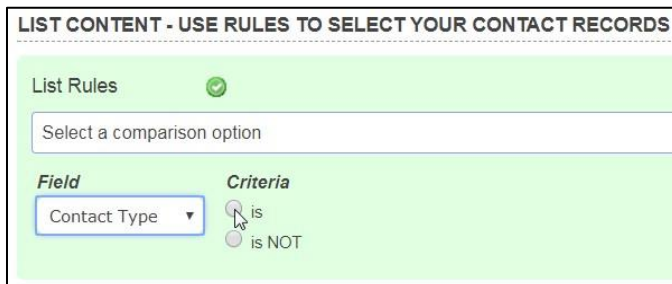
Similarly, the **Contact Type** of a staff demographic import is usually **Staff** and includes all staff members in the import.

Saved List Steps

In the *List Content – Use Rules to Select Your Contact Records* section, you will see a drop-down menu titled **Select a Field**. Use it to select the field that you wish to use in your list rule.



Choose the appropriate **Criteria** for the **Field** selected.



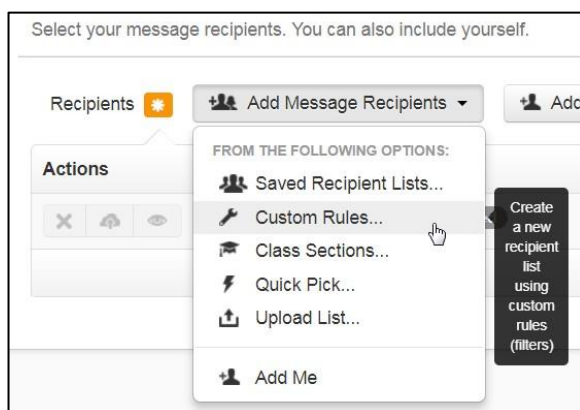
Choose the appropriate **Value**.



Click **Add** to apply the rule.

Message Sender Steps

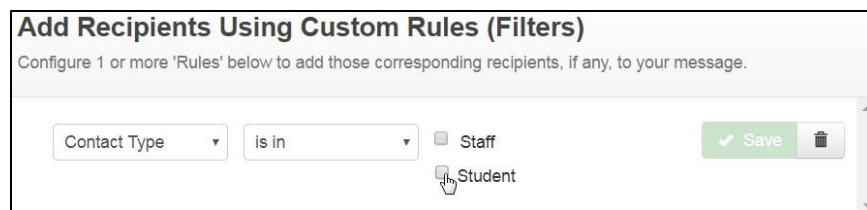
On Step 1 of a new broadcast, click **Add Message Recipients**, and then choose **Custom Rules**.



Select the field that you wish to use to create your rule from the **Select a field** drop-down.



The appropriate criteria will appear to the right. Make your selections from the drop-down menus, text boxes, and/or checkboxes that correspond with the rule you wish to make.



If you need to add more rules to this point, click **Add New Rule** and create another rule. Continue this process until you have created all your desired rules.

Once your rules are in place, click **Save**.

The **Add Recipients** button at the bottom right will update with the number of recipients.

Click the **Add Recipients** button to add the recipients to your list for the broadcast.

 **Note:** You can also click the  button to save this list to your saved lists if desired.

Manually Selecting System Contacts (Quick Pick)


The Quick Pick / manual selection method is used when you wish to broadcast to a specific group of contacts that do not otherwise have a connection to one another that is easily selectable with a rule.

For example, if you need to broadcast to the head custodian, the cafeteria manager, and the 7th grade English teacher, they will probably not have any fields in common that would allow the system to specify just these three contacts. Using Quick Pick to manually select them is the fastest and easiest way to add them, since no rule will be able to select only these contacts specifically.


In this example, the head custodian and the cafeteria manager may have possibly been in a group together, like **Contract Workers**, but the 7th grade English teacher will probably not be in that group. Even if they were, selecting entire groups using a rule would pull all contacts from those groups, and you would end up having a list of all contract workers and teachers.

If you want to broadcast to the principal, an 8th grade student, and the counsellor, they will typically not have any fields in common, so using Quick Pick to manually select them is the best way to add them to the list, since you cannot use a rule to select those specific contacts.

In this example, the principal and counsellor might be in the same group, but the student would not be. Even if the student were in the same group, selecting the entire group (like **Staff** or **Students**) would return all of the people in those groups, not just these specific contacts, so it would not work for what you need.






 **Note:** Because you are selecting existing contacts that are established by the data imports, then like a rule-based list, these contacts will update dynamically if their data changes as long as the imports are configured properly.


 **Note:** Technically, you could also use the **Manual CSV Upload – ID Lookup** method to create lists in this way, but for just a few, specific contacts, Quick Pick is generally the faster method.

 **Note:** The **Search by Rules** button is the same as **Quick Pick**, it just automatically defaults to the **Search by Rules** search method on the first screen.

Saved List Steps

In the **Additional List Tools** section, click **Quick Pick**.

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

 **Note:** The **Search by Rules** button is the same as **Quick Pick**, it just automatically defaults to the **Search by Rules** search method on the first screen.

Use one of the methods for searching for your contact records to find the desired contacts. See the *Appendix A: Quick Pick Search Options: Definitions* section for a detailed description of what these options mean and how to use them.

Search Options


☒ Search by Rules



☐ Search for Person

☐ Show All Contacts

☐ Search by Sections

Once your contacts are displayed, click to place a check in the box next to the names of those that you wish to add to your list.

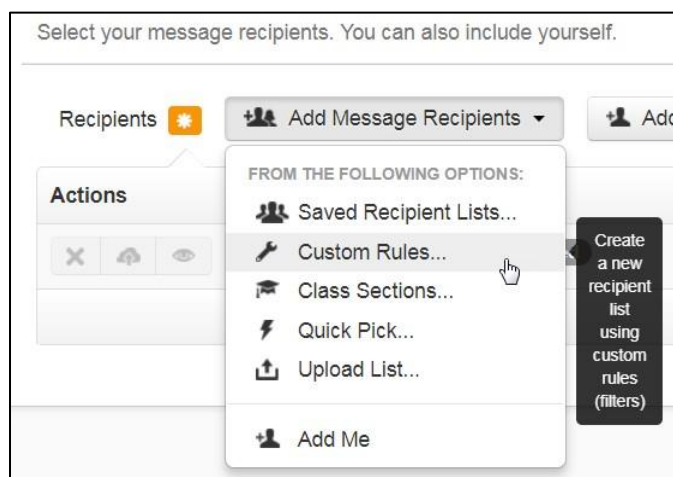
 **Note:** You can search for a contact, select them, and then search again for another person and select them, and so forth, as many times as you need. As long as you are in the **Quick Pick** screen, before clicking the **Done** button, the system will remember each selection you make, even if you have to search many times and select many contacts.

Search Results					
<div> Sort By <div> Last Name First Name - None - </div> <div>Show/Hide Fields</div> <div>Showing 1-30 of 30 records on 1 pages. Page 1</div> </div>					
In List	Unique ID	First Name	Last Name	Destinations	School
<input checked="" type="checkbox"/>	 KLTeach012	Feb	11	0 phones, 1 email, 0 sms	
<input type="checkbox"/>	 KLD007	Corey	Baker	0 phones, 2 emails, 0 sms	University of Windsor

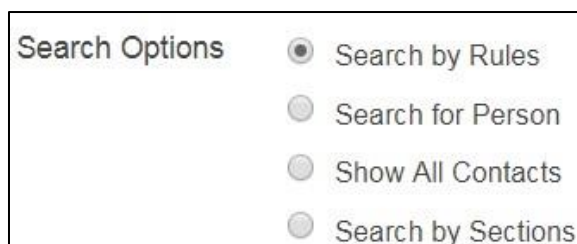
 **Note:** You can manage your list additions if you need to select and deselect further contacts in your list using this (and other) methods. See **Appendix B: List Adds/Skips Management** for more details.

Message Sender Steps


On Step 1 of a new broadcast, click **Add Message Recipients**, and choose **Custom Rules**.



Use one of the methods for searching for your contact records to find the desired contacts. See the *Appendix A: Quick Pick Search Options: Definitions* section for a detailed description of what these options mean and how to use them.



Once your contacts are displayed, place a check in the box next to the names of those that you wish to add to your list.

 **Note:** You can search for a contact, select them, and then search again for another person and select them, and so forth, as many times as you need. As long as you are in the **Quick Pick** screen, before clicking the **Add Selected Recipients** button, the system will remember each selection you make, even if you have to search many times and select many contacts.

Once all of your contacts have been selected according to your needs, click **Add Selected Recipients** to add them to your list for this broadcast.

 **Note:** You can also click the  button to save this list to your saved lists if desired.

Manual CSV Upload: ID # Lookup Method

Using the uploaded CSV method with ID # Lookup, you can create lists of groups of contacts that are already established as contacts via imports but may not share any common field that can be easily selectable in a rule-based list.


For example, perhaps your school has a dance coming up, and 50 students from four different grades have volunteered to be on the team responsible for setting up the decorations. These students are already established in the system as contacts, but they do not have any fields in common that would allow just their specific group to be selected by one rule – at the same time, there are too many of them to easily select with *Quick Pick*. Using the *ID # lookup* method via manual upload is a quick and easy way to add them to the list.

You need to send out a notification to the parents of 100 different students that need attention with their recent report cards, or they will be unable to participate in extracurricular activities. However, they are a mix of several different grades and activities. Selecting each group individually with a rule would select too many students, and it would take a long time to **Quick Pick** them. Using the ID # lookup method via manual upload is a quick and easy way to add them to the list.

In order to use this list method, you will have to create and upload a file with the following details:

- The file must be a .CSV file. No other file type will work.
- The file must have the unique ID number(s) of the contact(s) you wish to select, and those unique IDs must already be in your contact database that was established with import(s).
- The unique ID number(s) must be in the first column of the file (column A or Column 1, depending on your Excel settings). There does not need to be any other information besides unique ID numbers, but it will still work if there is, as long as the ID number is in the first column.






	A	B	C	D
1	Unique ID	Last Name	First Name	Phone 1
2	ST001456456	One	Person	
3				
4				
	A	B	C	D
1	Unique ID			
2	ST001456456			
3				
4				
	A	B	C	D
1	Last Name	Unique ID	First Name	Phone 1
2	One	ST001456456	Person	
3				
4				

 **Note:** Technically, you could also create lists like this with the **Quick Pick** method since both methods involve selecting existing contacts within the database, but Quick Picked contacts must be selected one at a time; therefore, this method is usually faster for larger groups as long as the required information is available.

Saved List Steps

Make a note of the location on your computer of the .CSV file that contains the unique IDs in the first column of the file.

In your list, in the **Additional List Tools** section, click **Upload List**.

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

From the **Type** options, choose **ID# Lookup**.

Click **Choose File**.

Browse to your **CSV** file on your computer. Select the file and click **Open**.

The filename will appear to the right of the **Choose File** button.

Upload List File

Type ☐ Contact data: File format must be a Comma Separated Value (CSV) text file. Once uploaded, the files columns can be mapped to names, destinations, and insertable fields for use in messages.

☒ ID# lookup: File format must be a Comma Separated Value (CSV) text file with ID#s only (one per line).

File ☒ data.csv

After confirming your settings, click **Next**.

If all of the desired contacts have Matched ID#s, then your file was created properly. The Matched ID#s will be listed – review them to make sure that the listed contacts are what you need in case you have to go back to add or remove any from the file. If you do need to make changes, click **Select a Different File**, make the changes in the file, save it, and start over with these steps until you reach the desired outcome.

If you have any Unmatched ID#s, they will be listed in addition to the Matched ID#s. Unmatched ID#s are unique IDs that were not found in the contact database. If there are any here that you need to include but that are showing as unmatched, check the unique ID to make sure it matches the existing contact in Communicate. A quick way to check this is to search for the contact by name in the **Search for Person** option in your **System** tab under the **Contacts** section. Oftentimes, the ID may simply have been spelled differently, or have a number in the

wrong position, but it may also indicate that an import has not been updated to include this person in the database yet. See the *Troubleshooting FAQ* section for more details.

 **Note:** It is common for the headers used in your **.CSV** file to be an **Unmatched ID#** – if this is your only unmatched ID, and the list of **Matched ID#s** looks fine otherwise, then you can simply continue with no consequence. For example, **Unique ID** is an **Unmatched ID#** – this is fine.

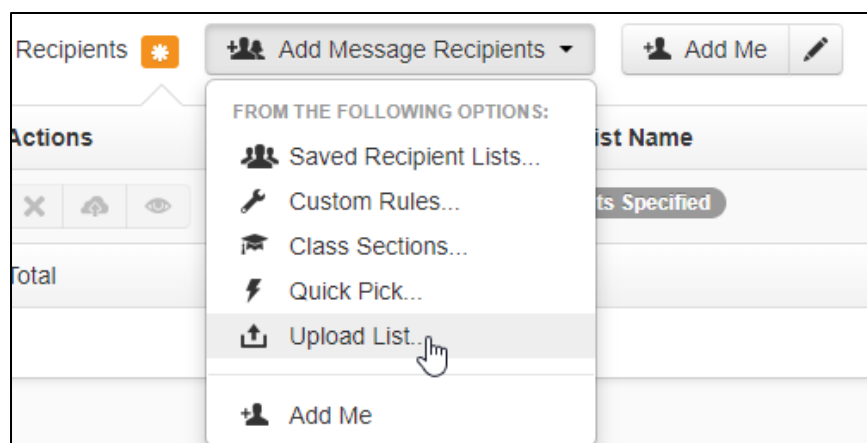
Click **Save** to save the contacts with Matched ID#s to your list.

Back on the main list screen, your contacts will be listed in the **List Add/Skip** section. See *Appendix B: List Adds/Skips Management* for information about how to manage this portion of the list.

Message Sender Steps

Make a note of the location on your computer of the **.CSV** file that contains the unique IDs in column A of the file.

In Step 1 of your new broadcast, click **Add Message Recipients**, then click **Upload List** button.

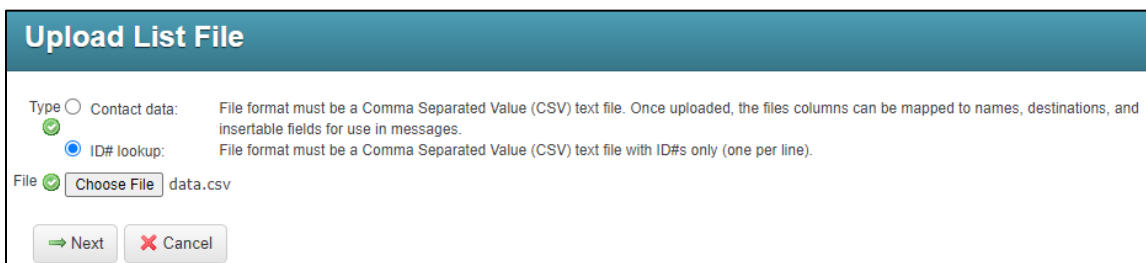


From the two Type options, select **ID # Lookup**.

Click **Choose File**.

Browse to your **CSV** file on your computer. Select the file and click **Open**.

The filename will appear to the right of the **Choose File** button.



Upload List File

Type ☐ Contact data: File format must be a Comma Separated Value (CSV) text file. Once uploaded, the files columns can be mapped to names, destinations, and insertable fields for use in messages.

☒ ID# lookup: File format must be a Comma Separated Value (CSV) text file with ID#s only (one per line).


File ☒ data.csv

After confirming your settings, click **Next**.

If all of the desired contacts have Matched ID#s, then your file was created properly. The Matched ID#s will be listed – review them to make sure that the listed contacts are what you need in case you have to go back to add

or remove any from the file. If you do need to make changes, click **Select a Different File**, make the changes in the file, save it, and start over with these steps until you reach the desired outcome.

If you have any Unmatched ID#s, they will be listed in addition to the Matched ID#s. Unmatched ID#s are unique IDs that were not found in the contact database. If there are any here that you need to include but that are showing as unmatched, check the unique ID to make sure it matches the existing contact in Communicate. A quick way to check this is to search for the contact by name in the **Search for Person** option in your **System** tab under the **Contacts** section. Oftentimes, the ID may simply have been spelled differently, or have a number in the wrong position, but it may also indicate that an import has not been updated to include this person in the database yet. See the *Troubleshooting FAQ* section for more details.

 **Note:** It is common for the headers used in your .CSV file to be an **Unmatched ID#** – if this is your only unmatched ID, and the list of **Matched ID#s** looks fine otherwise, then you can simply continue with no consequence. For example, **Unique ID** is an **Unmatched ID#** – this is fine.

Click **Save** to save the contacts with Matched ID#s to your list.

Back on the main list screen, your contacts will be listed in the **List Add/Skip** section. See *Appendix B: List Adds/Skips Management* for information about how to manage this portion of the list.

Manual CSV Upload: Contact Data Method

Using the uploaded CSV file method via Contact Data, you can create lists of groups of contacts that are **not already established as contacts** in the system via import, so that you can broadcast to them via phone or email for short-term or one-time situations or have a standalone group of contacts to use outside of your imports.

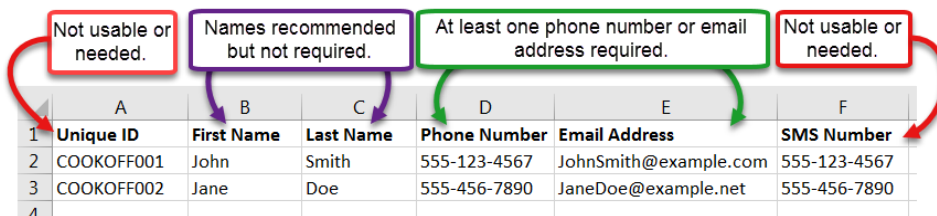
For example, perhaps you have a chili cook-off fundraiser coming up that your school is hosting. There was a sign-up sheet for the event, and a large number of community members, business owners, and citizens signed up with their names, phone numbers, and email addresses. You put these contacts into an Excel CSV file. Most of these people are not in your student or staff imports that establish your system contacts.

Since there is a large group of people, manually entering them into the list or creating a brand-new import is not time effective. In this case, uploading a CSV file with Contact Data is ideal, because you can still contact these people without having to create an entirely new import just to broadcast for this one occasion.

With this method, no ID numbers are needed, because these are not part of your normal system contacts.

For this method, you will need to create and upload a CSV file that contains the following:

- The names of the contacts (not required but recommended for your ease of reference).
- Phone numbers and/or Email addresses (required for broadcast purposes).



	A	B	C	D	E	F
1	Unique ID	First Name	Last Name	Phone Number	Email Address	SMS Number
2	COOKOFF001	John	Smith	555-123-4567	JohnSmith@example.com	555-123-4567
3	COOKOFF002	Jane	Doe	555-456-7890	JaneDoe@example.net	555-456-7890
4						

Annotations above the table:

- Red box over column A: Not usable or needed.
- Purple box over columns B and C: Names recommended but not required.
- Green box over columns D and E: At least one phone number or email address required.
- Red box over column F: Not usable or needed.

- Any other fields that correspond to your data, like Language or Grade (not required, but can be handy for reference purposes if desired).



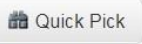
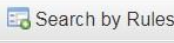
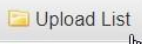
Important: You cannot broadcast SMS text messages to the contacts you upload using this method, even if you include the SMS numbers in the uploaded file, because of the unique nature of SMS requiring the opt-in process, which requires an actual import (remember: an import is not a list). If you absolutely need to send SMS, you will want to create a new import with these contacts and go through an SMS Opt-In Campaign for them. Depending on the situation, this can take some time, and may affect your other contacts, so if you are not certain of how to do this, contact your System Administrator or SchoolMessenger solutions support for assistance.

Note: Technically, you could use the manual entry method for this purpose as well, but for larger groups of contacts, uploading a CSV file via **Contact Data** method is ideal.

Saved List Steps

Make a note of the location on your computer of the .CSV file that contains the contact information.


In your list, in the **Additional List Tools** section, click **Upload List**.

ADDITIONAL LIST TOOLS	
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

Upload List File

Type ☒ Contact data: File format must be a Comma Separated Value (CSV) text file. Once uploaded, the files columns can be mapped to names, destinations, and insertable fields for use in messages.

☐ ID# lookup: File format must be a Comma Separated Value (CSV) text file with ID#s only (one per line).

File  data.csv

Click the **Choose File** button.


Browse to your **CSV file** located on your computer. Click on it, then click **Open**.





The filename will appear to the right of the button now. Make sure that you have **Contact data** still selected, then click the **Next** button to proceed.

You will be presented with the **Upload Preview** screen. Here, you will see the records uploaded from the CSV file. Above each column of data, a drop-down menu contains the possible fields for you to match to the data (known as mapping the data).

Communicate will attempt to detect the appropriate fields based on the headers and the data, but you may need to use the drop-down menus to manually map the fields to the data. Map the appropriate fields if necessary, making sure to include at least one contact item such as **Phone 1** or **Email 1**.

If you are not going to use a column of data, set it to - **Not Used** -. (Such as when an ID, physical address, or other piece of information that is not necessary here is part of the file that was uploaded.)

 **Note:** You will want to keep your broadcast types in mind here when mapping. For instance, if you plan to use a **General** broadcast type that only has Phone 1 and Email 1 selected, but you also have Phone 2 and Email 2 in your data, you may want to either choose a different broadcast type during the creation of your broadcast, or make sure that the right phones and emails are mapped here.

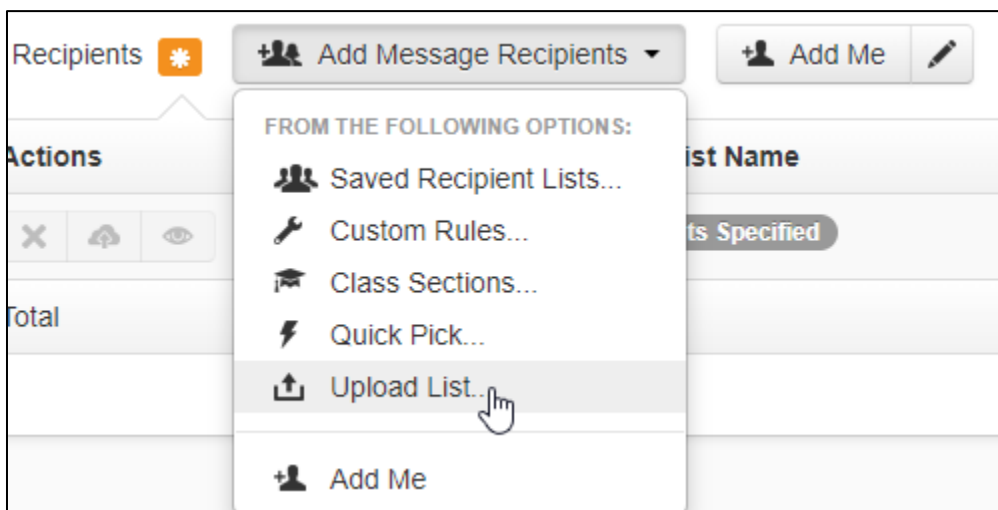
 Save	 Cancel	 Select Different File	 Refresh Mapping		
-Not Used- ▾	-Not Used- ▾	First Name ▾	Last Name ▾	-Not Used- ▾	Phone 1 ▾
login	accesscode	firstname	lastname	description	Invalid Phone: phone
kwood	1357	Karina	Wood		(555) 345-9006
bsmith		Bob	Smith		(831) 345-9999

Once you have mapped the data to the appropriate fields, click **Save** to return to the main list editor.

Message Sender Steps

Make a note of the location on your computer of the .CSV file that contains the contact information.

From the **Add Message Recipients** drop-down menu, select **Upload List**.



Select the **Contact Data** button.

Click the **Choose File** button.


Browse to the location of the .CSV file, click the file, and click **Open**.

The name of the .CSV file will be next to the button now. Make sure that the **Contact Data** button is still selected, then click **Next**.

You will be presented with the **Upload Preview** screen. Here, you will see the records uploaded from the CSV file. Above each column of data, a drop-down menu contains the possible fields for you to match to the data (known as mapping the data).

Communicate will attempt to detect the appropriate fields based on the headers and the data, but you may need to use the drop-down menus to manually map the fields to the data. Map the appropriate fields if necessary, making sure to include at least one contact item such as **Phone 1** or **Email 1**.

If you are not going to use a column of data, set it to - **Not Used** -. (Such as when an ID, physical address, or other piece of information that is not necessary here is part of the file that was uploaded.)

 **Note:** You will want to keep your broadcast types in mind here when mapping. For instance, if you plan to use a **General** broadcast type that only has Phone 1 and Email 1 selected, but you also have Phone 2 and Email 2 in your data, you may want to either choose a different broadcast type during the creation of your broadcast, or make sure that the right phones and emails are mapped here.

Save

Cancel

Select Different File

Refresh Mapping

-Not Used- ▾	-Not Used- ▾	First Name ▾	Last Name ▾	-Not Used- ▾	Phone 1 ▾
login	accesscode	firstname	lastname	description	Invalid Phone: phone
kwood	1357	Karina	Wood		(555) 345-9006
bsmith		Bob	Smith		(831) 345-9999

Once you have mapped the data to the appropriate fields, click **Add Selected Recipients** to save the contacts to your list return to the broadcast.

 **Note:** You can also click the  button to save this list to your saved lists if desired.

Manually Entering Contacts

You have the option to manually enter contacts into your lists in the event that you have a small number of contacts to broadcast to, or if you are not in a position to add them to your imports. While you can enter anyone as a contact manually, these will usually be contacts that are **not already established by an import**.






Keep these things in mind when manually entering contacts:

- You can only use the manual entry option in saved lists, not during the creation of a new broadcast.
- The manual entry method allows you to enter contacts one at a time. If you have an Excel spreadsheet with numerous contacts, consider using the *Manual CSV Upload: Contact Data* method, as it will likely be more time-effective for you.

- Contacts added to lists in this way are not searchable in the program, because they are not actual system contacts (which are established by imports).
- These contacts will not be viewable to other users unless they are subscribed to your list.
- You can use manually-entered contacts in your list for just this one list, or you can add the contact(s) to your Address Book, which saves them for your own future use (see *Saved List Steps: Address Book Selection*).
- You will have the option to enter the contact's physical address during manual entry. However, Communicate does not use this for any contact purposes, so this is just for your reference, and is completely optional.

Saved List Steps: Manual Entry

In the **Additional List Tools** section, click **Enter Contacts**.

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

In the first section, you can enter basic information about the contact, such as their **name**, **Language Preference** (which allows the system to send them the portion of the message that corresponds to the selected language if your message has multiple languages), and their **physical address**.

First Name

Last Name

Language Preference

English


Address Line 1

Address Line 2

City

State

ZIP Code

 **Note:** As previously mentioned, Communicate does not utilize the physical address of the contact – this is only for your reference, and is therefore completely optional.

The next sections allow you to enter the person's contact information. Each section has its own **Settings** section. Phone fields are under **Phone Settings**, email address fields are under **Email Settings**, and SMS number fields are under **SMS Text Settings** sections.

Depending on how many fields of each destination category your account has configured, and your user account settings, you may see one or more fields that are possible to enter or none at all.

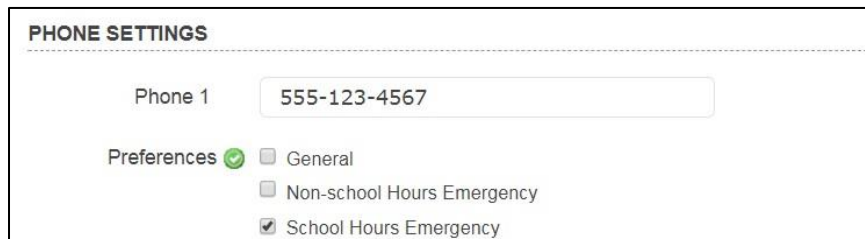
For example, if your account has a total possible number of three phone fields, you will see **Phone 1**, **Phone 2**, and **Phone 3** as options for entry (if allowed by your user account settings).

Underneath each of the fields, you will see the list of all broadcast types that you have access to with a checkbox next to each (**School Hours Emergency**, **General**, **Attendance**, etc.).

Enter the **Phone Number**, **Email Address**, or **SMS number** in the appropriate fields. Place a check next to all **Broadcast Types** that your contact should be contacted under for that particular field.


Note that some boxes may already be checked based on global account settings.

For example, if you want their **Phone 1** field to be contacted for **School Hours Emergency** broadcasts but not **General** broadcasts, then you will enter the number in the **Phone 1** field, check the box next to **School Hours Emergency**, and leave the box next to **General** unchecked.



PHONE SETTINGS

Phone 1

Preferences 

- ☐ General
- ☐ Non-school Hours Emergency
- ☒ School Hours Emergency


Once you have finished entering all of the fields and their broadcast type settings, scroll to the bottom of the page. Here, you have one final optional checkbox next to **Save to Address Book**. If you would like to save this contact to your personal address book, click to place a check in that box.

Once you are finished with the contact, click **Done** to save it to your list or address book.

Saved List Steps: Address Book – Creating Address Book Contacts Directly






In addition to adding contacts manually for single-use in one list, you can add the contacts to your personal Address Book by saving the contacts using the process described above, or by directly adding them to your Address Book, which is a similar process.

These contacts will not be searchable by any user, and they will not be available to other users to add to their lists.

 **Note:** Like any list, however, another user can have the ability to subscribe to the list and can use the list and its contacts in their broadcast, depending on the account and user account settings.

To create an Address Book contact directly rather than using the **Enter Contacts** method, complete the following steps:


Click **Open Address Book** in the **Additional List Tools** section of your list, or by clicking the **Address Book** link in the top right of the screen under your organization name.

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

In the first section, you can enter basic information about the contact, such as their **name**, **Language Preference** (which allows the system to send them the portion of the message that corresponds to the selected language if your message has multiple languages), and their **physical address**.

First Name

Last Name

Language Preference 

English


Address Line 1

Address Line 2

City

State

ZIP Code


 **Note:** As previously mentioned, *Communicate* does not utilize the physical address of the contact – this is only for your reference, and is therefore completely optional.

The next sections allow you to enter the person’s contact information. Each section has its own **Settings** section. Phone fields are under **Phone Settings**, email address fields are under **Email Settings**, and SMS number fields are under **SMS Text Settings** sections.

PHONE SETTINGS

Phone 1

555-123-4567

Preferences 

☐ General

☐ Non-school Hours Emergency

☒ School Hours Emergency

Depending on how many fields of each destination category your account has configured, and your user account settings, you may see one or more fields that are possible to enter or none at all.

For example, if your account has a total possible number of three phone fields, you will see **Phone 1**, **Phone 2**, and **Phone 3** as options for entry (if allowed by your user account settings).

Underneath each of the fields, you will see the list of all broadcast types that you have access to with a checkbox next to each (**School Hours Emergency**, **General**, **Attendance**, etc.).

Enter the **Phone Number**, **Email Address**, or **SMS number** in the appropriate fields. Place a check next to all **Broadcast Types** that your contact should be contacted under for that particular field. Note that some boxes may already be checked based on global account settings.

Note that some boxes may already be checked based on global account settings.

For example, if you want their **Phone 1** field to be contacted for **School Hours Emergency** broadcasts but not **General** broadcasts, then you will enter the number in the **Phone 1** field, check the box next to **School Hours Emergency**, and leave the box next to **General** unchecked.

Once you are finished with the contact, click **Done** to save it to your Address Book.






 **Note:** If you need to modify any existing contacts, you can click **Edit** next to their name in the Address Book.

Saved List Steps: Address Book – Selecting Address Book Contacts







Your Address Book contacts, once entered manually and saved to the Address Book (see *Saved List Steps: Manual Entry*) or created directly in your Address Book (see *Saved List Steps: Address Book – Creating Address Book Contacts Directly*) can be added to future lists using the following steps.

Keep in mind that your Address Book is viewable only under your own user account. Address Book contacts cannot be shared between user accounts. You can, however, add them to your list, and publish it out for other users to use in their broadcasts. (See *Publishing a List*).

Under **Additional List Tools** in your list, click **Open Address Book** button.

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

For each contact, there is a checkbox available under the **In List** column. Click to place a check in the checkboxes for the contacts that you wish to add to your list from your Address Book.

Contacts 								
Add New Contact 								
In List	First Name	Last Name	Language	Phone 1	Email 1	SMS 1	Address	Actions
<input type="checkbox"/>	Charlie	Danner	English	555-241-5241	cdanner@example.com	555-241-5398	88 Elmdale Road	 Edit  Delete
<input type="checkbox"/>	Karina	West	English	555-241-6241	kwest@example.com	555-417-2413	19 Cherry Street	 Edit  Delete

Click **Done** when finished.

Create Lists by Section (Classroom Messaging Module Required)

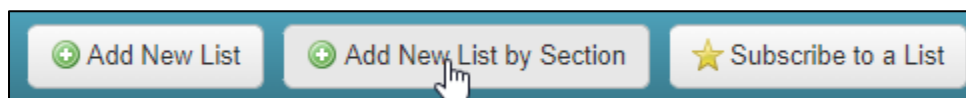
If your account has Classroom Messaging enabled, and the configuration is such that your user account is allowed to create lists by section (class), then you can create lists by selecting your classes (sections), which will auto-populate the list with the students from your classes.

Important: Classroom Messaging is not enabled by default with Communicate. If enabled, there are different ways of using the feature that may not include the ability to make lists with section data. If you do not see portions of one or more of the following steps and think that you should, contact your System Administrator for help.


Saved List Steps

Navigate to the **Broadcasts** tab and click **Lists**.


Click **Add New List by Section**.



Enter a **List Name**. You can also add an optional **Description** of your list.


List Name 	<input type="text"/>
Description	<input type="text"/>

In the **List Content** section, you will see a drop-down called **Sections**. Use the drop-down menu to choose a school that you are associated with, and under which you expect to find your classes (sections).

LIST CONTENT - USE RULES TO SELECT YOUR CONTACT RECORDS	
Sections	--- Choose a School --- 

Once your school is selected, the classes (sections) that you are associated with will appear as checkboxes below it. Check the boxes next to the classes that you wish to add to your list. This will automatically add all student records that are associated with that class to your list.

LIST CONTENT - USE RULES TO SELECT YOUR CONTACT RECORDS

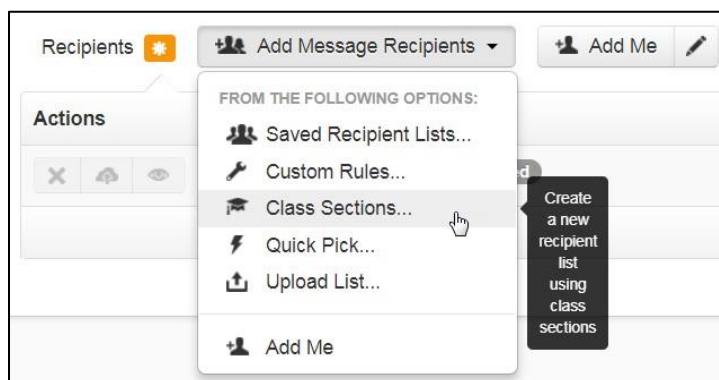
Sections  High School

- ☐ BUS235-1002
- ☐ FOR610-1006
- ☐ ART123-1000


To ensure that the list has been populated correctly, click the **Preview** button to view the student selections that were made, review the contacts listed and click **Done** when you have finished.

Message Sender Steps

From the **Add Message Recipients** drop-down, choose **Class Sections**.




Choose the application school from the **School** drop-down.

School  Select School...


Once the school is chosen, the classes (sections) will populate below in the **Class Sections** area. Click to place a check in the box next to each class with which you'd like to fill your list.

Class Sections

Showing 1 - 6 of 6

Sections  Section Name

- ☐ AGR036-1003
- ☐ ART123-1000
- ☐ BUS235-1002

 **Note:** If there are many classes, you can start typing the name of the class in the search bar to narrow down the results to make it easier to find, if desired.

Click the **Add Recipients** button to add the contacts to the list for your broadcast.

Choosing the Target Recipients (Guardian Data)

If your Communicate account uses **Guardian Data Model**, then you have the ability (in most setups) to target who your list contacts. The possible targets are as follows:


- **Contacts:** The students themselves.
- **Associated Guardians:** The guardians of the students (parents, grandparents, etc.).
- **Both:** Both the students themselves, and the guardians.

If associated guardians (or both) are selected, you can then restrict the list to contact only certain **guardian categories** (Primary, Secondary, Mother, Father, Grandmother, Babysitter, etc.).

For example, you are creating a list for a disciplinary committee broadcast that needs to only go out to the primary parents, but not the students themselves or the extended family, which are in other categories like 'grandmother' and 'aunt'. In this case, you would choose **Associated Guardians** for the target, and then restrict the category to **Primary** (or equivalent).

You are creating a list for a student council president election that needs to go out to the students, but not guardians because it is a student-only activity. In this case, you would choose **Contacts** for the target of the list.

Follow the steps below to choose the target recipients while creating a saved list or during broadcast creation in the message sender.

 **Important:** *Methods of adding contacts to your lists that do not refer to imported system contacts (like uploading a CSV file via Contact Data method) will have the option to choose a target, but it will not work when the broadcast is sent for those contacts, because they are not part of the specific Guardian Data Model import configuration. See [Troubleshooting FAQ](#) for more help.*

Saved List Steps

In the **Target Recipients...** section, choose the appropriate target.

If you have selected **Contacts** or if you do not need to restrict the list target to particular guardian categories, then you are done. Otherwise, continue to the next step.

TARGET RECIPIENTS - YOU CAN SELECT CONTACT RECORDS AND/OR THEIR ASSOCIATED GUARDIAN RECORDS

Target Recipients 

☐ Contacts

☐ Associated Guardians

☒ Both

If you have chosen to target your list to guardians by selecting **Associated Guardians** or **Both**, and you wish to restrict the list target to certain guardian categories, then check the box next to **Restrict to these categories**.

Finally, check the boxes next to each guardian category to which you'd like to restrict your list.


Guardian Category 

Restriction

☒ Restrict to these categories:

☒ Primary


☐ Secondary

 **Note:** For those using the Guardian Data Model, when you create a list in **List Builder**, the number shown in the **Total** field represents **Contacts** that fit your search criteria only. If your list includes both **Contacts** and **Guardians**, the number of recipients in **Message Sender** may differ from the number shown in the **Total** field when you created the list as the recipient counts in **Message Sender** include contacts and all their associated guardians by default.

Message Sender Steps

First, select your recipients for the broadcast using any method you like. See *Methods for Adding Contacts to Lists* for more information.

To the right of the contact(s) you selected, click on the **drop-down menu** in the **Targets** column.


 **Note:** If you chose to select a saved list for your broadcast here, then the drop-down menu will be greyed-out. This is because the target settings for the list are chosen during the creation of that saved list, and here you are simply selecting the list, not creating it.



Recipients 				
 				
Actions	Recipient/List Name	Recipient Languages		Targets
 	 All Staff	English	229	Contacts & Guardians
		Spanish	24	
		Chinese	51	
  	 Staff Type is Certified	English	5	Contacts & Guardians 
Total				309

Choose the target from the **Target Recipients** drop-down.


If you chose **Contacts**, or if you do not plan on restricting your list target to specific guardian categories (parent, grandparent, etc.), then you are done at this point and can the next step.


If you have chosen to target your list to guardians by selecting **Associated Guardians** or **Both**, and you wish to restrict the list target to certain guardian categories, then check the boxes next to each guardian category to which you'd like to restrict your list.



Target Recipients 

 Both 


SELECT TARGET RECIPIENTS...

 Contacts

 Associated Guardians

 Both 


You can use the drop-down menu next to **Restrict to these categories** for selection options, if you need to select or deselect the categories en masse to make it easier to pick and choose. However, if you choose **All** and leave it on that selection, then essentially there is no restriction, because all categories will have been selected, so make sure you have selected/deselected all categories as desired.

Guardian Category Restriction 	<input type="checkbox"/> Restrict to these categories
	<input type="checkbox"/> Primary
	<input type="checkbox"/> Secondary

Click **Update** to save your change.

Language and Recipient Counts

The **Recipient Languages** column displays the number of recipients who have listed that language as their preference. This number includes the language preferences of both contacts and guardians by default unless your saved list has specific targets selected or if you decide to update the targets from a list you created from **Message Sender**. If updating specific targets, the **Recipient Languages** counts will update accordingly. The numbers displayed in this column should add up to match the number displayed under the **Count** column in the same row.



 **Note:** The count will stay the same if no additional contacts or guardians are found. For example, if your list includes 10 students with no associated guardians, the count will remain at 10 when you narrow your target to just **Contacts**.

Recipients

Add Message Recipients

Add Me

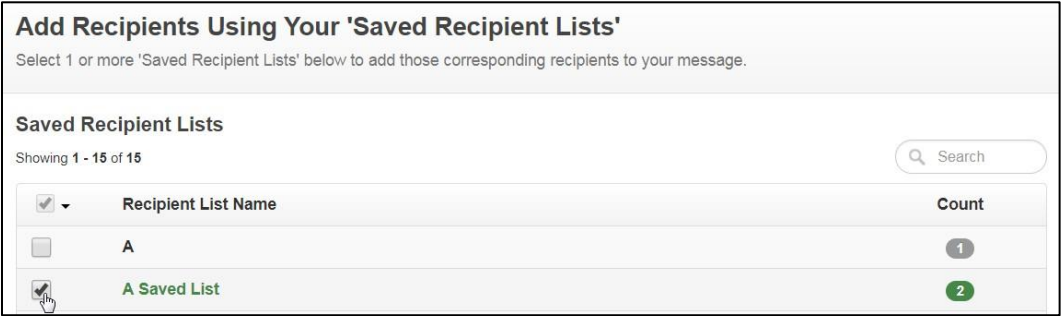
Actions	Recipient/List Name	Recipient Languages		Targets	Count
	All Staff	English	81	Contacts & Guardians	90
		Spanish	9		
	TH Guardians	English	631	Contacts & Guardians	631
Total					721

 **Note:** Clicking the  icon to the right of the list will show the complete list of contacts that fit your initial search criteria when the list was created, even if the target is changed to **Guardians Only**.

To quickly view how many contacts will be sent your broadcast without including the number of associated guardians, simply update the target to **Contacts Only** in **Message Sender**. Note that you will have to switch the target selection back to **Contacts & Guardians** if you intend to send the broadcast to both groups

Selecting a Saved List for a Broadcast

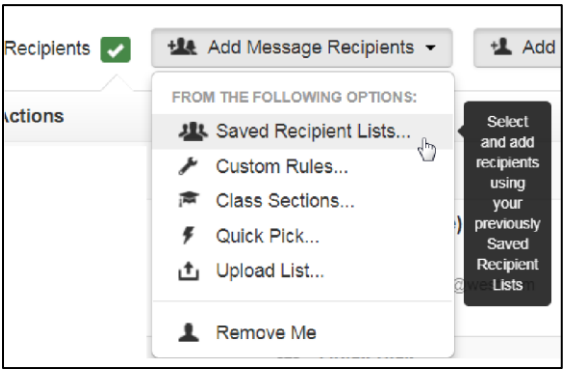
Once you have created and saved a list of contacts, you can use it in your broadcasts. Follow the steps below to select your saved list during broadcasts created from the **New Broadcast** button on the Dashboard or created manually by advanced users.



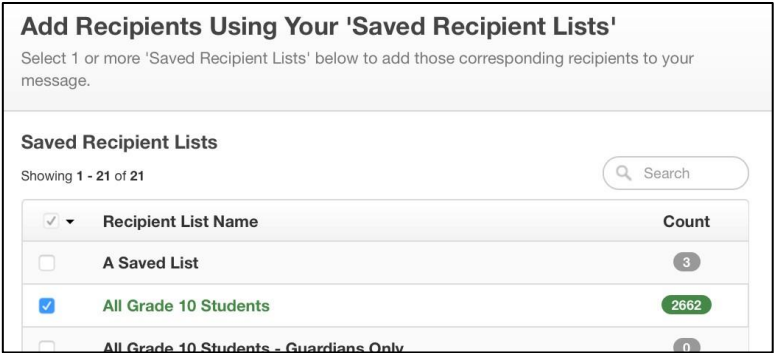
During New Broadcast from Message Sender (Dashboard)

Navigate to the **Dashboard** tab and click **New Broadcast**.

In the first page of the broadcast, use the **Add Message Recipients** drop-down and choose **Saved Recipient Lists**.



Click to place a check in the boxes next to the lists that you wish to add to your broadcast.



Once you have selected all the desired recipients, click the **Add Recipients** button.

During Manual Broadcast Creation (Advanced Users)

Navigate to the **Broadcasts** tab, then to the **Broadcasts** subtab, and then click **Add New Broadcast**.


Enter the broadcast name, description, etc. from the first part of the broadcast as you normally would.

In the **List(s)** section, click to place a check in the box next to the list(s) that you wish to use in your broadcast. As you check them, the lists and their totals will be updated in the box below for your reference.

Finish entering the other parts of the broadcast as you normally would.

Publishing & Subscribing to Lists


The Publish and Subscribe features can help save everyone time by allowing users to share lists with one another. This can be especially helpful with complicated and custom lists, as the work only needs to be done once, and then can be published for anyone else who could benefit from its use to subscribe to.

 **Important:** *Not all users will have access to publish and/or subscribe, based on the profile their user account was given. Please contact your System Administrator about access to these features.*

Publishing Lists

Once your list has been created, you can share it with other users so that they may use it by publishing the list.

If you are already familiar with the process, click the **Publish** link next to your list within the **Broadcasts** tab and under the **Lists** sub-tab screen. You will be taken through a simple step-by-step process to publish the list. Click the Guide button within the process for a thorough explanation of each step if you wish or continue on for more details.

 **Note:** *Once your list is published, any changes you make to that list will directly affect broadcasts created by other users who have subscribed to and use that list.*

Who Should be a Publisher?

- System Administrators and users who will have access to and/or be primarily in charge of message broadcasts for an entire school, district or organization.
- These individuals will likely have access to all messaging options, broadcast options, list options and contact data fields.
- Users who have a high functioning level of expertise and training.

Typically, not all users should be publishers since most lists are simple rule-based lists that are easily created or contain contacts that are specific to the users' function within your organization.

What Lists Should be Published?

- Lists which are meant to broadcast to the whole organization or to large groups within, such as a whole school building or commonly used group of contacts, guardians or staff.
- Lists which were complicated or tedious to create - which less experienced users may need to use, but would have trouble creating themselves.

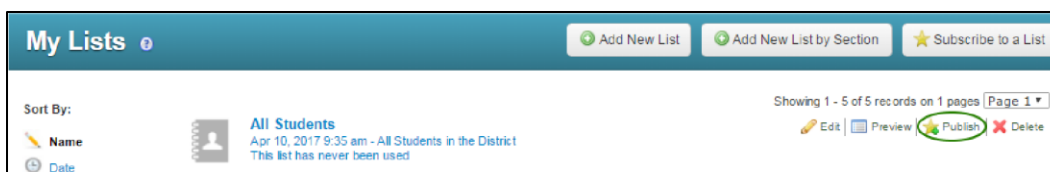
- Lists of contacts that required the manual loading of a CSV file (who are not available as part of the data imports for your account).

Not all lists should be published since certain lists should not be accessed by certain users. Lists like that which contains just a certain school building, classrooms or specific activities are only needed by certain users and should generally only exist on their accounts to prevent others from accidentally broadcasting to them. Use your best judgment.

How to Publish a List

Navigate to the **Broadcasts** tab, then to the **Lists** sub-tab.

Next to the list that you wish to share with other users, click **Publish**.

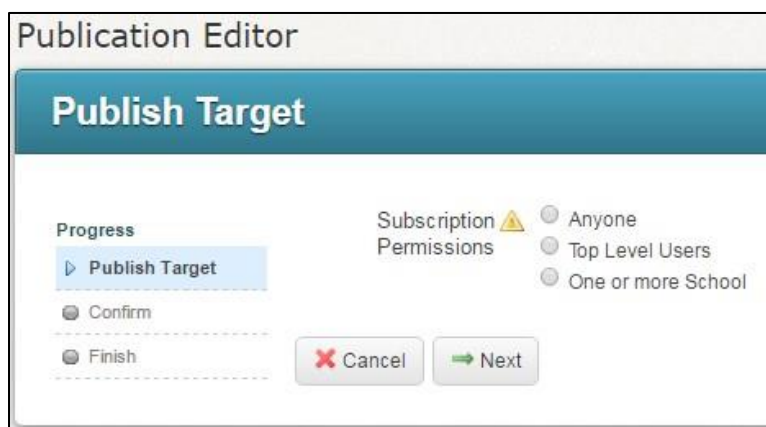


Clicking on **Publish** starts the *Publication Editor*. The first option you must select is whether to allow **Anyone**, **Top Level Users**, or **One or more Schools** to have permission to subscribe to the list that you are publishing.

Anyone: Every user in Communicate (who has subscribe permission based on their profile settings) will be able to subscribe to the list.

Top Level Users: Only administrators with no data view restrictions will be able to subscribe to the list. Even one restriction (such as to a specific school or a specific field) will remove the user (even administrators) from the Top Level Users category.

One or more Schools: You will be given options to check which schools a user must be restricted to in order to subscribe to the list.



Click in the small circle in front of one of these choices and then click the **Next** button.

If you choose **One or more Schools**, then you must check all schools in your account to which you wish to give users the ability to subscribe to this list. After checking all that apply, click **Next**.



After selecting your target and/or school, the next step is to confirm your selections. If everything in the summary is accurate, check the **Confirm** box and then click **Next**.

Your list has been published.



Click **Done**.


You will be taken back to the **My Lists** section where you will now see that the former **Publish** link has changed to **Modify Publication** and, below the list details, **Changes to this list are published** has appeared.




How to Un-Publish a List

If you ever decide that a list should no longer be published, but that you do not want to delete the list, you should click **Modify Publication** to the right of the list.

Choose the **Un-Publish This Item** option, then click the **Next** button.

 **Note:** *Un-publishing a list will remove that list for all users who have subscribed to it. It may be a good idea to send a memo informing people you will be un-publishing a list that may have been subscribed to by others to prevent unexpected problems.*

A dialog box with a light green header. It contains a 'Subscription' section with a green checkmark icon and a 'Permissions' section with three radio button options. At the bottom are 'Cancel' and 'Next' buttons.



Subscription  ☒ Un-publish This Item

Permissions

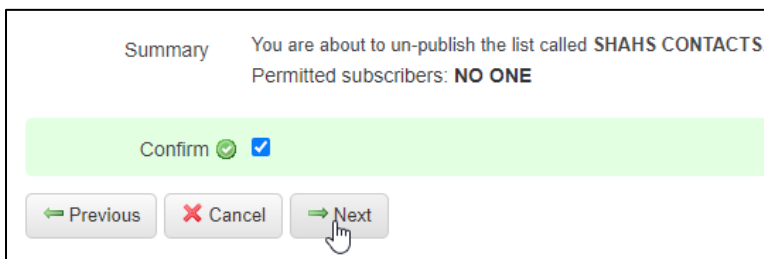
☐ Anyone

☐ Top Level Users


☐ One or more School




 Cancel  Next

Check the **Confirm** box.

A dialog box with a 'Summary' section and a 'Confirm' section. The 'Confirm' section has a green bar with a checkmark and a checkbox. At the bottom are 'Previous', 'Cancel', and 'Next' buttons.

Summary You are about to un-publish the list called **SHAHS CONTACTS**.
Permitted subscribers: **NO ONE**


Confirm  ☒

 Previous  Cancel  Next

Click the **Next** button, then click **Done**.

A dialog box with a 'Success!' message and a 'Done' button.


Success!
This item has been **un-published**.

 Done

Subscribing to Lists

Subscribing to lists is an easy way for users, especially those who have not had training in creating custom lists based on rules or uploading CSV files, to save time and set up lists for their future broadcasts.

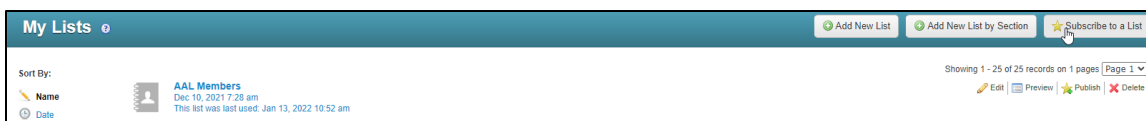
Subscribed lists **cannot be edited or deleted**, like lists that you created yourself. Only the owner/creator of the list can edit or delete it. The only options you have on a subscribed list are **Preview** and **Un-Subscribe**.

 **Note:** When broadcasting to a list to which you have subscribed, be aware that any changes the publisher of that list makes will affect the recipients of future broadcasts using that list. If you see recipients on the list that you do not want to broadcast to or if any are missing, contact the owner of the list or your System Administrator for help, or use a different list.

How to Subscribe to a List

Navigate to the **Broadcasts** tab, then to the **Lists** sub-tab.

Click **Subscribe to a List**.



Find the lists that you wish to subscribe to and click the **Subscribe** button to the right for each.

Published Lists				
Showing 1-2 of 2 records on 1 pages Page 1				
Name	Description	Modified	Owner	Action
All Students & Guardians - General	Students, primary & secondary guardians	Dec 31, 2022 1:13 pm	smjas	 Subscribe
Edna's Class	Just the 4th graders	Apr 28, 2021 11:04 am	bapple	 Subscribe

If you wish to unsubscribe a list, just click **Unsubscribe** for the appropriate list from this page.

Once you have finished updating your subscriptions, click **Done**.

When you look at the available lists, any list you have subscribed to will show a message indicating you are subscribed to that list.



Frequently Asked Questions

What follows are some common questions about the usage and function of lists, and the answers to those questions. If you are having trouble with lists, check out the *Troubleshooting FAQ* section of this guide.

How do I add contacts to my list?

There are several ways to add contacts to your lists. See the *Methods for Adding Contacts to a List* section of this guide for detailed instructions.

Will the contacts in my lists automatically update when the imports run?


If the method you used for adding contacts to your list selects contacts from the system contacts that were established by imports, then yes. The contacts will automatically update as the imports update if the list was created from any combination of using **rules**, using **Quick Pick**, or using manual CSV upload via **ID # Lookup**.

Your contacts will not automatically update if you manually entered contacts, or if you used manual CSV upload via **Contact Data**.

If a student's ID number (unique ID) changes in our SIS, will my list be updated automatically or will I need to change it?

If the method that you used to select the student was manual CSV upload via **ID # Lookup**, or **Quick-Picking** the student directly, then the list will update, but the student will be removed from the list automatically, because at that point, the system sees the student as a different contact record.

However, if your list selected the student by a **rule**, then as long as that student contact has the data that the rule is using to select the students, the student should remain in the list. For example: if the rule that you used in your list was **Grade – is – 8**, and the student's grade value remains as **8** even after their ID number was changed, then they would still be in your list, and their ID number will reflect the new one.

 **Note:** *Contacts added to lists using manual CSV upload via Contact Data or manual entry will never update automatically, including in this situation, since they are not part of any import, inherently.*

What is the difference between ID# Lookup and Contact Data methods when uploading a CSV file to my list?

The ID # Lookup method uses IDs that match those of contacts that are already established by the imports. Essentially, it pulls existing contacts into your list based on the data in your CSV file.

The Contact Data method does not select contacts that are already in the system. Instead, it uses phone and/or email contact information from your CSV file to create a list of contacts that are not already found in the system.

See the appropriate sections for *ID # Lookup* and *Contact Data* methods in this guide for more details.

Can I use more than one list in a broadcast?

Yes! You can use as many lists as you like – there is no limit! You can even use saved lists (as many as you like) and then add more contacts during the broadcast (if created using the **Dashboard** tab -> **New Broadcast** button).

If you're creating your broadcast under the **Broadcasts** tab -> **Broadcasts** sub-tab -> **Add New Broadcast** button, you can select multiple lists by checking their boxes, but not add contacts outside of saved lists. This is normally done by advanced users only.

Can I use a saved list in a broadcast, and then add more contacts while creating the broadcast?

If you are in the Message Sender (found under the **Dashboard** tab -> **New Broadcast** button), then definitely! Simply select your saved list, and then use the **Add Message Recipients** drop-down to add more contacts by any method you like.

How do I add and remove contacts that were manually added or Quick Picked from my saved list?

See *Appendix B: List Adds/Skips Management* for directions.

Troubleshooting: Common Issues FAQ

Why am I not seeing the correct number of recipients, or no recipients in my rule-based list?

For those using the Guardian Data model, the recipient counts seen in Message Sender include all contacts that fit your criteria as well as all associated guardians by default. Because the number displayed when you created a saved list includes contacts only, it could be difficult to know the exact recipient number when the saved list is used in Message Sender, as the recipient counts in Message Sender include all guardians associated with the contacts selected by default. This means that the recipient number could be different from the number you saw when you created the list.

Updating targets may affect the number of recipients that you see in Message Sender. For example, if you create rule-based list of Grade 10 students and none of those students have any associated guardians, updating the target to **Guardians Only** will show 0 recipients in Message Sender.


To quickly view how many contacts will be sent your broadcast without including the number of associated guardians, simply update the target to **Contacts Only** in Message Sender. Note that you will have to switch the target selection back to **Contacts & Guardians** if you intend to send the broadcast to both groups.

If you're still not seeing the correct number or no recipients in your list and don't understand why, most likely, you have a data view restriction on your user account, such as being restricted to only seeing one school, or being restricted to only one kind of data.

For example, let's say that there is an elementary school, a middle school, and a high school in your district. If your district has 100 students in first grade, and your list's rule is **Grade – is – 1**, but you are showing no students, then you probably have a restriction of one of the other schools, and not the elementary school.

On the other hand, using the same example above, you could have a restriction on the **Grade** field, such as being restricted to just grades 2 through 5. Since grade 1 is not in the restriction, that is why you are not seeing any grade 1 students in your rule selecting first-graders.

If you believe that your restrictions are incorrect, contact your System Administrator(s) for assistance, as they are the ones that control these restrictions.

 **Note:** If you contact SchoolMessenger Solutions Support to look at restrictions, we are happy to assist in any way that we can, but keep in mind that permission is needed from a System Administrator before changing any restrictions on user accounts or profiles.

I uploaded a CSV file to create my list, but I have 0 contacts or an incorrect number of contacts after the upload — why?


In this situation, the ID # Lookup method would have been used. Here are some troubleshooting steps:

- When you uploaded the file, did the final screen show that you had unmatched IDs, or show less matched IDs than expected?
 - If so, find an example of a contact that you expected to see but who is not in the list, and note their ID number. Then, go to the System tab > Contacts sub-tab, choose “Search for Person”, type the ID number in the field, and see if any contacts show up.

- If the contact does not show up, try searching for the name of the contact instead.
- If the contact shows up now, then the ID number is likely incorrect. Correct the ID(s) in the .CSV file, and re-upload the file to try again.
- If the contact still does not show up, then the contact either does not exist in the system already, or you may be restricted from seeing that contact based on a data view restriction in your user account. Contact your System Administrator for help.
- Does your .CSV file have the ID numbers in the first column? (Column A or Column 1 depending on your Excel settings). If not, make sure the ID numbers are in the first column, then try again.


Why can't I see the Upload List button when making a list?

Your user account's profile is restricted from being able to upload CSV files to lists. You will need to contact your System Administrator for help if you believe this restriction to be incorrect.

 **Note:** If you contact SchoolMessenger Solutions Support to look at restrictions, we are happy to assist in any way that we can, but keep in mind that permission is needed from a System Administrator before changing any restrictions on user accounts or profiles.


Why can't I see the ID # Lookup method when I try to upload a CSV file to my list?

Your user account's profile is restricted from being able to upload CSV files via the ID # Lookup method to lists. You will need to contact your System Administrator for help if you believe this restriction to be incorrect.

 **Note:** If you contact SchoolMessenger Solutions Support to look at restrictions, we are happy to assist in any way that we can, but keep in mind that permission is needed from a System Administrator before changing any restrictions on user accounts or profiles.

Why can't I see the Contact Data method when I try to upload a CSV file to my list?

Your user account's profile is restricted from being able to upload CSV files via the Contact Data method to lists. You will need to contact your System Administrator for help if you believe this restriction to be incorrect.

 **Note:** If you contact SchoolMessenger Solutions Support to look at restrictions, we are happy to assist in any way that we can, but keep in mind that permission is needed from a System Administrator before changing any restrictions on user accounts or profiles.

Why can't I send an SMS message to a list created from an uploaded CSV file via the Contact Data method?

The ability of Communicate to send SMS text messages to contacts requires them to first opt in to receive the messages. To do this, there first be an established system contact in Communicate that has SMS numbers mapped to SMS fields. Normally, a school or organization will launch what we call an SMS Opt-In Campaign, informing the contacts that they will be receiving an initial opt-in message, asking that they respond to it to opt in for messages. After that, as long as the lists select already-established contacts and those contacts have opted in, *then* they will receive SMS messages.

Uploading a CSV file directly into a *list* does *not* establish system contacts; only *imports* do that (remember; imports are not lists). Therefore, the SMS process cannot be properly followed, and so the system will not allow contacts that are uploaded via this method to be contacted via SMS.

If the contacts you want to contact via SMS already exist in the system and they have SMS fields mapped (and of course, if they are opted in), then you can try using a **rule** to select them, **Quick Pick** them, or use the **manual CSV upload via ID # Lookup** method instead of this method.

Why can't I map SMS numbers for my uploaded CSV file (Contact Data method)?

The ability of Communicate to send SMS text messages to contacts requires them to first opt in to receive the messages. To do this, there first be an established system contact in Communicate that has SMS numbers mapped to SMS fields. Normally, a school or organization will launch what we call an SMS Opt-In Campaign, informing the contacts that they will be receiving an initial opt-in message, asking that they respond to it to opt in for messages. After that, as long as the lists select already-established contacts and those contacts have opted in, *then* they will receive SMS messages.

Uploading a CSV file directly into a *list* does *not* establish system contacts; only *imports* do that (remember; imports are not lists). Therefore, the SMS process cannot be properly followed, and so the system will not allow contacts that are uploaded via this method to be contacted via SMS.

Hence, even if you have SMS numbers in your Contact Data CSV, you will not be able to map them to your SMS fields.

If the contacts you want to contact via SMS already exist in the system and they have SMS fields mapped (and of course, if they are opted in), then you can try using a **rule** to select them, **Quick Pick** them, or use the **manual CSV upload via ID # Lookup** method instead of this method.

The contacts in my list after I uploaded the Contact Data CSV have mixed up data (such as phone numbers in the name field) – what happened, and how can I fix it?

All that is really *required* when using the Contact Data method is columns that contain phone numbers and/or email addresses. Other fields are optional and used only for your convenient reference (like the names, grade level, language, etc.). There are also some fields that are unable to be used at all with this particular method (like SMS numbers or ID numbers).

When you uploaded the file, did you make sure that the columns that contained the phone and/or email information were mapped to the appropriate phone and email fields? How about any other fields you included?

Take a look at the CSV file that you uploaded via the Contact Data method. Make sure that it has everything you need, and that it is saved somewhere so you can easily reference it. Then, in your list, go to the List Adds/Skips section, and click “Remove All Adds” to remove the contacts. Go through the **Upload List via Contact Data method process** again. This time, on the screen where you map the data columns, make sure that you are mapping them to the correct corresponding system fields:

- ID Number / Unique ID: Set this field to – Not Used –
- SMS (text) numbers: Set these fields to – Not Used –

- First Name
- Phone Numbers: Phone 1, Phone 2, etc.
- Email Addresses: Email 1, Email 2, etc.
- Other information: Whatever corresponds (e.g. English” could be mapped to the Language field).

I uploaded my list in the Imports section under the Admin tab, but I don't see it on the Broadcasts tab in the Lists section — what went wrong?

What you have done is create a new import, rather than a list. See the *Important Distinction: Lists Are Not the Same as Imports* section for more details on the difference between imports and lists.

If you are trying to create a list, and not an import:

To create your list properly, go to the **Broadcasts tab**, and then to the **Lists sub-tab** (which is what you should see by default anyway when you click on the Broadcasts tab).

Then, click on the **Add a New List** button.

You have many options for creating lists, but if you have a .CSV file, you will probably need to click the **Upload List button**.

If you have a CSV file with ID numbers, check out the *Manual CSV Upload: ID # Lookup Method* section for instructions.

If you have a CSV file that just has contact information, check out the *Manual CSV Upload: Contact Data Method* section for instructions.



Note: If you accidentally created an import, you may want to delete it before continuing – however, please make sure that you have a copy of the file that you uploaded to create the import before doing so. If you have any doubts or are unsure of how to delete or modify imports safely, please contact your System Administrator or SchoolMessenger Solutions Support for help.

If you are trying to create an import, and **not a list**:

If you are not familiar with the process of creating imports, you should contact your System Administrator or SchoolMessenger solutions support for assistance.

I found out that I have a restriction on my account that affects my lists, but I need it to be changed or removed — what do I do?


If you believe that the restrictions on your user account and/or profile are incorrect, contact your System Administrator. SchoolMessenger solutions support is happy to help, but keep in mind that support cannot change restrictions for user accounts or profiles without the permission from a System Administrator.

Why can't I edit a list that I'm subscribed to in order to add or remove contacts?

Only the original creator (owner) of the list that you're subscribed to can make changes to it. Create your own list, add more contacts during broadcast creation (remember you can have more than one list / set of contacts per broadcast), or get in touch with the owner of the list or your System Administrator for help.

Why can't I see the Subscribe to a List button?

Your user account's profile is restricted from being able to subscribe to lists. If you believe this is incorrect, contact your System Administrator for help.

 **Note:** If you contact SchoolMessenger Solutions Support to look at restrictions, we are happy to assist in any way that we can, but keep in mind that permission is needed from a System Administrator before changing any restrictions on user accounts or profiles.


Why can't I see a list to subscribe to it when others can?

When a user publishes a list, they get to choose who is able to subscribe to the list. There are three groups that they have to choose from. You are probably not in the group allowed to subscribe to the list, if this is the case.

The options they have are:


- **Anyone:** This includes every user account that is allowed by their profile restrictions to subscribe to lists.
- **Top-Level Users:** This includes only user accounts that have absolutely no data view restrictions. Even administrator users could be excluded from this group if they have even one data view restriction.
- **One or more schools:** This option allows the publisher to restrict who can subscribe to the list based on which school data view restriction they have on their user account. For instance, if the publisher sets it to just **middle school**, but a user account is restricted to just **elementary school**, then the user would not see it.

If you believe that you should be in one of those groups, and yet you cannot see the list, or you need to review or change your restrictions, contact your System Administrator for help.

 **Note:** If you contact SchoolMessenger Solutions Support to look at restrictions, we are happy to assist in any way that we can, but keep in mind that permission is needed from a System Administrator before changing any restrictions on user accounts or profiles.

I can't publish a list, or I don't see the publish tools in my Lists section — what is wrong?

Your profile is most likely restricted from publishing lists. Contact your System Administrator if you believe that this is incorrect.


 **Note:** If you contact SchoolMessenger Solutions Support to look at restrictions, we are happy to assist in any way that we can, but keep in mind that permission is needed from a System Administrator before changing any restrictions on user accounts or profiles.

I'm trying to create a list by section (Classroom Messaging), but I don't see the Add New List by Section button — why not?

The ability to create lists using section (class) data requires that your Communicate account have the Classroom Messaging feature enabled. Are you certain that your Communicate account has this enabled?

If you are certain that Classroom Messaging is enabled:

The ability to create lists using section (class) data is controlled by a setting in your user profile. You are most likely restricted from creating lists using section data. Contact your System Administrator for help if you think that this is incorrect.

 **Note:** If you contact SchoolMessenger Solutions Support to look at restrictions, we are happy to assist in any way that we can, but keep in mind that permission is needed from a System Administrator before changing any restrictions on user accounts or profiles.

If you find out that Classroom Messaging is not enabled:


Get in touch with your administrators about looking into this feature if you like, or if you are an administrator, contact your Account Manager or Sales for more information. We are happy to help you get set up with this great feature!

I'm trying to create a list by section (Classroom Messaging), but I don't have a Lists sub-tab under the Broadcasts tab, I just have the word Classroom — why can't I create a list by section?

The Classroom Messaging feature of Communicate is very versatile and has two main modes of use: Classroom Comments, and the ability to create lists using section (class) data.

Usage varies from account to account, but one of the most common ways to use it is to have users that are restricted to just sending Classroom Comments. When this is the case, a user will typically see only the **Classroom** section under the **Broadcasts** tab. Most likely, whether it was intended or accidental, this is how your account is currently configured.

Contact your System Administrator if you believe that this restriction/mode is incorrect.

 **Note:** If you contact SchoolMessenger Solutions Support to look at restrictions, we are happy to assist in any way that we can, but keep in mind that permission is needed from a System Administrator before changing any restrictions on user accounts or profiles.

I'm trying to create a list by section (Classroom Messaging), but I don't see all of the students in that class in my list, how can I fix that?

The classes and the corresponding students that you can see are determined by the data that the Classroom Messaging feature is composed of, as well as any restrictions that are in place on your user account. If you can select the section (class) in a list, but still don't see the correct number of students, contact your System Administrator or SchoolMessenger solutions support for help, as there may be a discrepancy with the data.

I sent a broadcast using my list in which I uploaded a CSV file with the ID Lookup method, but not everyone (or no one) was contacted — what happened?

There are a few possibilities:

- If it was just one destination that had the issue (Phone, Email, SMS), then you may have used a broadcast type that does not include that destination.

Try a different broadcast type; being mindful of its appropriateness (do not use Emergency types for general announcements, etc.).

- You may be restricted from broadcasting to certain destinations (Phone, Email, SMS). Check with your System Administrator to see if you have such a restriction.

Go to your list directly (**Broadcasts** tab -> **Lists** sub-tab -> click on the list name). Look at the Total section — is it 0 or does it have contacts?

If the total is 0, take a look at the CSV file that you used to upload contacts to your list with the ID # Lookup method.

Are the unique IDs in the first column? (Column A or Column 1, depending on your Excel settings). If not, save a backup copy of this CSV file for reference, and then reorganize the file so that the unique IDs are in the first column, then try uploading the file again.


- Are these the right unique IDs? Copy a few of them, and search for them in the system independently (**System** tab -> **Contacts** -> Search for Person).

If the contacts do not show up when you search by the unique ID, try searching for them by name instead. If you find them by name, it means the unique ID in the CSV file is incorrect. Correct the unique ID(s) and try uploading the file again.

If you do not find them even by name, it means that you are probably restricted from selecting or viewing these contacts. Contact your System Administrator if you believe this restriction is incorrect.

If the total is correct when you check your list, and you can see your contacts if you click **Preview**, then check the broadcast settings that you used when you created the broadcast.

- It is possible that you have used a broadcast type that did not include most of the destinations (phone, email, etc.) that you needed.
- You may have scheduled a broadcast for a certain time, but that time may be outside of your normal call time restrictions. These are set by your System Administrator — if you find that this is the issue, contact them for assistance.

 **Note:** If you contact SchoolMessenger Solutions Support to look at restrictions, we are happy to assist in any way that we can, but keep in mind that permission is needed from a System Administrator before changing any restrictions on user accounts or profiles.

I sent a broadcast using my list in which I uploaded a CSV file with the Contact Data method, but not everyone (or no one) was contacted — what happened?

There are a few possibilities:

- If it was just one destination that had the issue (Phone, Email, SMS), then you may have used a broadcast type that does not include that destination.

Try a different broadcast type; being mindful of its appropriateness (do not use Emergency types for general announcements, etc.).

- You may be restricted from broadcasting to certain destinations (Phone, Email, SMS). Check with your System Administrator to see if you have such a restriction.
- The phone numbers and/or email addresses may be mapped incorrectly in the list.

Go directly to your list (**Broadcasts** tab -> **Lists** sub-tab -> click on the name of the list). Click **Preview**. In the **Destinations** column, do you see positive numbers in the **Phone** and **Email** sections, or do you see all 0's?

If there are all 0's, that means that the data was probably mapped incorrectly when the CSV was uploaded. Make sure that the CSV file has everything you need for your list. Then, click **remove all adds** in the **List Adds/Skips** section of the list, and reupload the CSV file. Make sure that the columns that contain phone and email data are mapped to the correct phone and email fields (**Phone 1**, **Email 1**, etc.). Check the **Preview** to make sure that the **Destinations** column has the right data now.

- If you see positive numbers in the **Destinations** column, click on the link to open the contact. Make sure that phone numbers are in the phone fields, and that email addresses are in the email fields. If there are any that are mixed up, make sure that the CSV file has everything you need for your list. Then, click **remove all adds** in the **List Adds/Skips** section of the list, and re-upload the CSV file. Make sure that the columns that contain phone and email data are mapped to the correct phone and email fields (**Phone 1**, **Email 1**, etc.). Check the **Preview** to make sure that the **Destinations** column has the right data now.

I uploaded a CSV file with the Contact Data method into my list. Then, I selected the target recipients and/or guardian category restriction, but when I use the list, everyone is contacted instead of just the targets I chose — what happened?

Guardian Data Model requires that the contacts and associated guardians are part of the specifically configured Guardian Data imports. You can choose the targets for lists that are made by uploading a CSV via the Contact Data method, but the broadcast cannot actually filter by the target you selected because those contacts are not part of the Guardian Data imports. Contact your System Administrator or SchoolMessenger solutions support for more help.

Reference Guide – Which List Method to Use?

List Method	Created By...	Common Situations for Using This List Method
Rule-Based Selection	Selecting contacts with rules, such as Contact Type – is – Staff or Grade – is – 8	<p>The rule-based method is the most commonly used method, and in most cases, it is the best to use. It is typically used when you want to broadcast to a specific group of contacts that is constantly changing, such as a list of all students when notifying parents of school events, or a list of all staff members for internal memorandums, or even a list of just one grade for grade-specific notifications.</p> <p>Because these lists are based on rules that reference existing contacts established by data imports, they dynamically update as the imports update. This means that as long as the data imports are configured properly, you only have to create the list once, and you can use it indefinitely, even as the new school year starts, or new students are added.</p>
Quick Pick / Manually Selecting Contacts	Using the Quick Pick function to manually select contacts individually.	<p>The Quick Pick / manual selection method is used when you wish to broadcast to a specific group of already-established system contacts that do not otherwise have a connection to one another that is easily selectable with a rule.</p> <p>For example, if you want to broadcast to the principal, an 8th grade student, and the counselor, they will typically not have any fields in common, so using Quick Pick to manually select them is the best way to add them to the list, since you cannot use a rule to select those specific contacts.</p> <p><i>Note: Because you are selecting existing contacts that are established by the data imports, then like a rule-based list, these contacts will update dynamically if their data changes as long as the imports are configured properly.</i></p> <p><i>Note: Technically, you could also use the uploaded CSV – ID Lookup method to create lists in this way, but for just a few contacts, Quick Pick is generally the faster method.</i></p>
Manually Entering Contacts	Entering contacts directly into a list which are not included in the normal system contact database.	<p>The manual entry method of entering contacts into a list is typically used when you want to broadcast to specific people that are not currently present in the system contacts that are established by the data imports. Usually, this is either a one-time situation, or the person creating the list is the only one that will be broadcasting to these people, but situations can vary.</p> <p>For example, perhaps you wish to contact a community business owner in a broadcast for an important announcement in a one-time situation. You may have an import that creates student contacts</p>

		<p>and an import that creates staff contacts, but no import contains the business owner's contact information. You could manually enter their contact information into your list, use it in a broadcast, and then later remove it from the list. Alternately, if the list contains <i>only</i> the business owner's information, you could save the list just in case you need it in the future.</p> <p>Note: <i>Technically, you could use the uploaded CSV file with Contact Data method for this purpose, but for a small number of contacts, generally manually entering the contacts is quicker.</i></p>
Uploaded CSV (ID Lookup)	By uploading a .CSV file that contains unique IDs in the first column that are already present in the normal system contact database.	<p>Using the uploaded CSV method with ID Lookup, you can create lists of groups of contacts that are already in the system, but may not share any common field that can be easily selectable in a rule-based list.</p> <p>For example, perhaps your school has a dance coming up, and 50 students from various grades have volunteered to be on the team responsible for setting up the decorations. These students do not have any fields in common that allow all of them to be selected by one rule, so using a CSV file that contains their IDs is a quick and easy way to add them to the list.</p> <p>Note: <i>Technically, you could also create lists like this with the Quick Pick method, but those must be selected one at a time; therefore, this method is usually faster for larger groups as long as the required information is available.</i></p>
Uploaded CSV (Contact Data)	By uploading a .CSV file that contains just contact data, with no unique IDs.	<p>Using the uploaded CSV file method with Contact Data, you can create lists of groups of contacts that are <i>not</i> already in the system.</p> <p>For example, perhaps you have a chili cook-off fundraiser coming up that your school is hosting. There was a sign-up sheet for the event, and various community members, business owners, and citizens signed up. Most of these people are not in your student or staff imports that establish your system contacts. In this case, uploading a CSV file with Contact Data is ideal, because you can still contact these people without having to create an entirely new import just to broadcast for this one occasion.</p> <p>Note: <i>Technically, you could use the manual entry method for this purpose as well, but for larger groups, uploading a CSV file with Contact Data is ideal.</i></p>

Quick List Template Guide

Below is a short guide that includes the most commonly used list rules. These will apply for most Communicate users.

Keep in mind, however, that most accounts also have many other fields, including possibly custom fields, which allow for an even more versatile list building experience. Also, most rules have multiple selections in the “criteria” portion of the rule that you can use to create lists.


In some cases, these rules will not work at all for some accounts – it all depends on the unique configuration of the account. Contact your System Administrator or SchoolMessenger solutions support for help, if needed.

The following are the most common and useful rules for a typical Communicate user.

Commonly Used List Rules			
Field	Criteria	Value	List Effect
Contact Type	is	Student	Full list of all students.
Contact Type	is	Staff	Full list of all Staff Members.
Grade	is	Any Grade(s)	Full list of all students in the selected grades.
School	is	Any School(s)	Full list of all students and/or staff in the selected schools.

Appendix A: Quick Pick Search Options: Definitions


When using the Quick Pick option to build your list or to add contacts, there are multiple ways to search for contacts so that you can Quick Pick them. Here are the definitions of the different search methods.

 **Note:** These are the same search methods that are found in various parts of Communicate, such as in the **System** tab -> **Contacts** sub-tab.


Search Options
☒ Search by Rules
☐ Search for Person
☐ Show All Contacts
☐ Search by Sections


Search by Rules

Choose the **Search by Rules** option to create a rule that will display the contacts based on which rule that you used. For instance, if you want to Quick Pick a few students, but don't want to see the Staff Contacts to make it easier, you can use the rule **Contact Type – is – Student** here, and only the students will display so you can pick them.

Rules 

Enter a value

Field	Criteria	Value
Contact Type 	<input checked="" type="radio"/> is <input type="radio"/> is NOT	<div><input type="checkbox"/> Staff</div> <div><input checked="" type="checkbox"/> Student</div>


 Add

Search for a Person

Choose the **Search for Person** option to search for a single person. You can type basically any piece of information about them to search for them, such as their unique ID, their name, or their phone number. This will display all matches to the information you use to search. Typically, this is the most used search method with Quick Pick, because most scenarios in which you would use Quick Pick involve the need to find just a few select contacts, specifically.

Search

Enter a name, phone number, ID#, or email

 Search

Choose the **Show All Contacts** option to display every established system contact in Communicate. Most often, there will be multiple pages, and it automatically sorts them in alphabetic order by last name, but you can sort them however you like using the **Sort by** options.

Sort By

Last Name 

First Name 

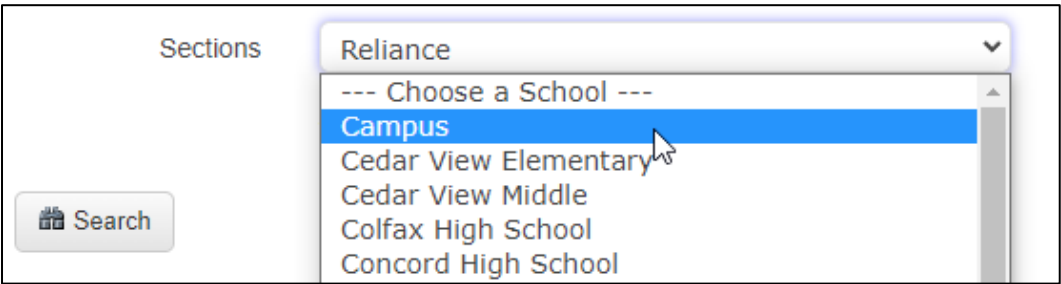
- None - 

 Show/Hide Fields

You can display additional fields in the contact list by clicking on **Show/Hide Fields** and choosing the fields you wish to include.

Search by Sections (Classroom Messaging module required)

If you have the Classroom Messaging feature, and your user account is allowed to use section (class) data to create lists, then you will see the **Search by Sections** option. With this method, you can use the drop-down menu to select the school and check the box(es) for the desired class(es) you wish to display to Quick Pick from.



Appendix B: List Adds/Skips Management

When you create a list, you are essentially either adding or removing contacts from the group of contacts to which you wish to send a broadcast.

When you add a contact directly via the **Quick Pick**, **Upload List** or manual entry (**Enter Contacts** button) methods, those contacts appear in the **Additions** section in your list. When you remove an addition from the list, it removes the contact from the list entirely because it was a standalone contact rather than rule-selected.

When you add contacts via the **Rule** method, and then remove them from your list individually, they are added to the **Skips** section in your list. When you remove a skip from the list, it adds the contact back to the list because it is no longer skipped, since it is part of a rule, rather than standalone like the other method selections.

Below, you will find a tutorial for how to manage list **Adds** and **Skips** for any kind of applicable list.

Adding an Addition to the List (Add Contact to List)

Use via the **Quick Pick**, **Upload List**, or manual entry (**Enter Contacts** button) method to add contacts to the list.

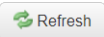
Removing an Addition from the List (Remove Contact from List)

While in the List Editor screen (**Broadcasts** tab -> **Lists** sub-tab -> click on the name of the list), navigate to the **List Add/Skip** section. In the **Additions** section, all of the manual additions will be listed, and each has a checkbox next to the contact.

 **Note:** If there are multiple pages, you can use the **Page...** drop-down menu in the top right section of this list to move to the other pages.

LISTADD/SKIP				
Additions		Showing 1-3 of 3 records on 1 pages. Page 1		
Remove all adds				
In List	Unique ID	First Name	Last Name	
<input type="checkbox"/>	107483	Stephanie	Aaron	
<input checked="" type="checkbox"/>	102808	Erin	Abernathy	
<input checked="" type="checkbox"/>	1007488	Jeremaine	Acosta Barrera	


Click the checkbox next to the contact(s) you wish to remove.




At the bottom of the screen, click the  button. The screen will refresh, and the contact will have been permanently removed from the list.

If you wish to remove all the additions, click **Remove all adds** to remove all contacts.

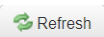
Removing a Skip from the List (Add Contact Back to List)

While in the List Editor screen (**Broadcasts** tab -> **Lists** sub-tab -> click on the name of the list), navigate to the **List Add/Skip** section. In the **Skips** section, all of the (rule-selected) contacts that were skipped from the Preview menu will be listed, and each has a checkbox next to the contact.

 **Note:** *Contacts that were Quick Picked or uploaded with ID Lookup are not found in the Skips section because they were not added with rule selection and are essentially standalone.*

LIST ADD/SKIP				
Skips		Remove all skips		Showing 3 records.
In List	Unique ID	First Name	Last Name	
<input type="checkbox"/>	 stu1073147	Roberto	Abbie	
<input type="checkbox"/>	 stu1007023	Dillick	Abel	
<input type="checkbox"/>	 stu1038008	Loza	Abel	

Click the checkbox(es) next to the contact(s) that you wish to remove from the **Skips** section (and therefore place back in the active list contacts).

At the bottom of the screen, click the  button. The screen will refresh, and the contacts will have been removed have been from the **skips** and added back to the active list contacts.

If you wish to remove all skips, click **Remove all skips**.