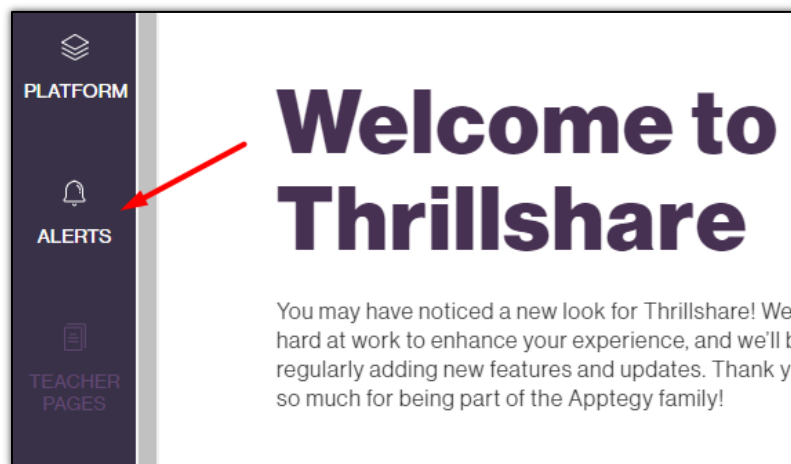


Apptegy/Thrillshare

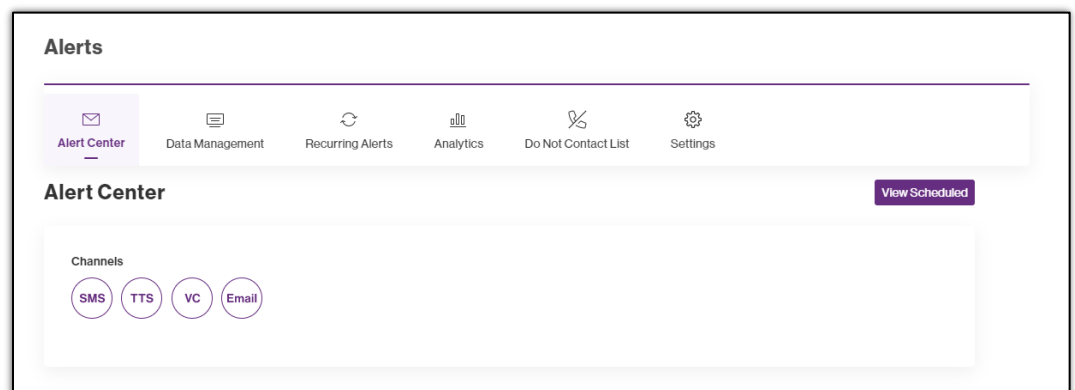
Auto Notifications and Alerts Help Document

Summary – This document explains the different features of the Auto Notifications and Alerts portion of Thrillshare, the Apptegy platform. This document also provides the steps of how to set up Auto Notifications and Alerts.

1. Login to <https://www.apptegy.net/home.html> or through the app.
 - A. Download the app on google play here:
<https://play.google.com/store/apps/details?id=com.apptegy.thrillshare>
 - B. Download the app on the app store here:
<https://apps.apple.com/us/app/thrillshare/id1024147876>
2. Go to Alerts on the left toggle menu:
 - A. This will bring you to the Alert 'Dashboard'.



- B. The **Alert center** is where you go to send out a **NON-recurring** alert. We will learn more on that later!
 - SMS = text
 - TTS = talk to speech (think robot calls)
 - VC = voice call
 - Email = email notifications



- C. **Data Management** is where you manage and create your call lists and data lists for sending alerts.

- Call List

The screenshot shows the Alerts dashboard with the Data Management section active. The Call List table contains the following data:

LIST NAME	LAST UPDATED	CONTACTS
Carmella Test Only	08/17/2021 at 12:01PM	1
Kim	06/08/2021 at 09:57AM	1
Kelly	06/08/2021 at 09:57AM	1
Kim and Kelly	06/08/2021 at 09:57AM	3

- Data List

The screenshot shows the Alerts dashboard with the Data Management section active. The Data List table contains the following data:

LIST NAME	LAST UPDATED	CONTACTS
Carmella Test Only	08/17/2021 at 12:01PM	1
Kim	06/08/2021 at 09:57AM	1
Kelly	06/08/2021 at 09:57AM	1
Kim and Kelly	06/08/2021 at 09:57AM	3

D. **Recurring Alerts** is where you manage and create message templates and recurring alerts.

The screenshot shows the Alerts dashboard with the Recurring Alerts section active. It displays two tables:

Messages Table:

NAME	DESCRIPTION	CHANNELS
Test	Test message	SMS

Recurring Alerts Table:

NAME	DESCRIPTION	STATUS	CHANNELS
------	-------------	--------	----------

E. **Analytics** gives you information like date/time, channel, success, failed, message, etc.

Alerts

Alert Center | Data Management | Recurring Alerts | **Analytics** | Do Not Contact List | Settings

Analytics

DATE/TIME	CHANNELS	SUCCESS	FAILED	MESSAGE
August 17, 2021 12:03 PM EDT	SMS	1	0	Reminder! There will be a scheduled update for OnBase on Wednesday April 7, 2021 and it will be offline all day for all...
	TTS	1	0	Reminder! There will be a scheduled update for OnBase on Wednesday April 7, 2021 and it will be offline all day for all...
June 8, 2021 10:07 AM EDT	SMS	6	0	Reminder! There will be a scheduled update for OnBase on Wednesday April 7, 2021 and it will be offline all day for all...
	TTS	6	0	Reminder! There will be a scheduled update for OnBase on Wednesday April 7, 2021 and it will be offline all day for all...
June 8, 2021 10:06 AM EDT	SMS	6	0	Reminder! There will be a scheduled update for OnBase on Wednesday April 7, 2021 and it will be offline all day for all...

F. **Do Not Contact List** - Here is where you add contacts that do not want to be contacted. You can pick and choose the channels that the contact does not want to receive messages from (text, email, etc).

Alerts

Alert Center | Data Management | Recurring Alerts | Analytics | **Do Not Contact List** | Settings

Do Not Contact List Add Contact

search

Requested By	Contact Info	Blocked Channels	Last Updated By
No Data			

Page 1 of 1

G. **Settings** - You can set your email defaults to customize where the email generates.

Alerts

Alert Center | Data Management | Recurring Alerts | Analytics | Do Not Contact List | **Settings**

Settings

Email Defaults

From:

Email:

- You can set the SMS (text) intro message.

SMS Intro Message (default language only) 5 / 20

SCRIC

Call Intro Message (default language)

Please hold for an important message from SCRIC

Call Intro Message Translations Arabic

يُرجى الانتظار لرسالة مهمة من SCRIC

Refresh All Translations

Save Changes

3. **Alerts Center** - This is where you send out one-time alerts.

- Click on the circles to choose which channels you'd like the message to go out.
- The background of the circle becomes purple when you choose the channel.
 - However, you cannot choose both TTS and VC at the same time. See how when the VC is chosen, the TTS is grayed out? In the below example, SMS and VC is chosen, but email is not.

Channels

SMS TTS VC Email

Select Lists

Add Recipients

Voice Call

Click to Record 00:00

SMS Message

Enter your message...

Publish Now Schedule

- The next step is to select the 'list' of recipients. You can choose more than one list for the message to go to.

Channels

SMS TTS VC Email

Select Lists

Add Recipients ←

Voice Call

Click to Record
00:00

SMS Message

This is a reminder that Homecoming is Friday, September 24th.

Select Lists X

search... Q

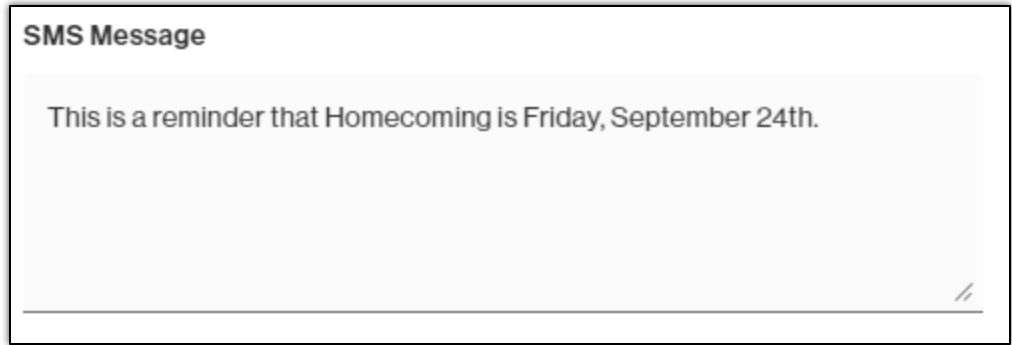
- Carmella Test Only
- Kim
- Kelly
- Kim and Kelly
- Deb only 2
- Kim

⚠ This list is not set up for translations. If you use this list, the message will be sent out in English.

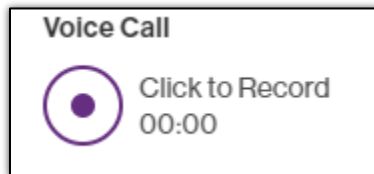
Add Selected Lists Cancel

Note: The triangle error message states that the corresponding list cannot be translated.

D. Add your SMS message:

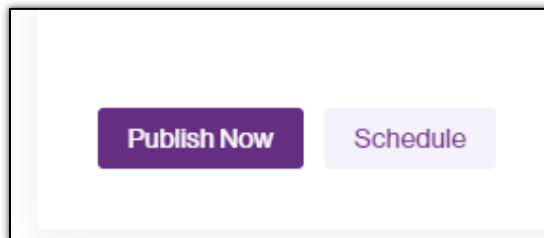


- E. Because voice call is chosen, a message needs to be recorded.

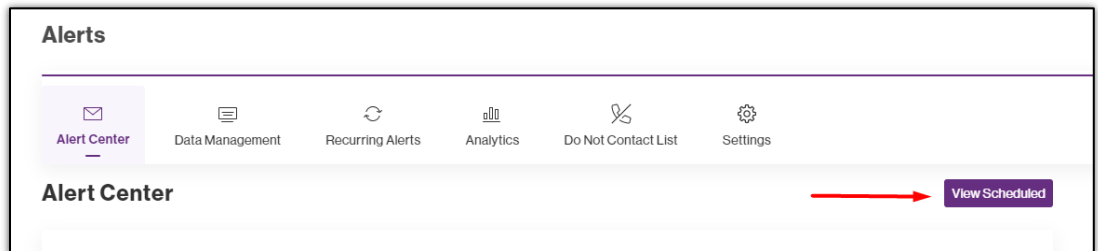


Note: You need a microphone on your device to record a message.

- F. Once you have an SMS message and a voice recording, choose 'Publish now' to send out the alert ASAP or choose 'Schedule' to pick the date and time you want the alert to be sent out.

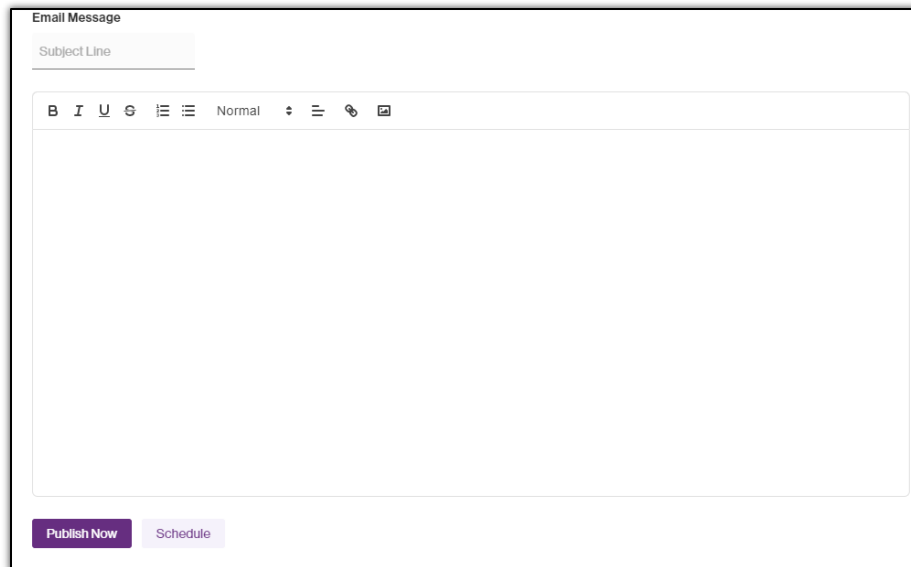


- G. To manage your scheduled alerts, choose 'View Scheduled'.

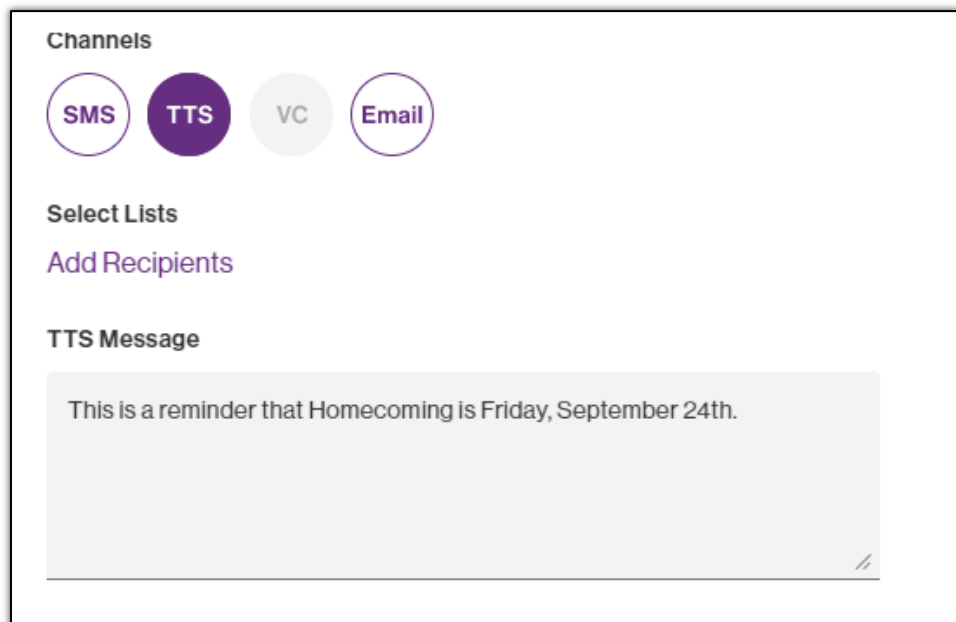


Note: Single alerts sent through the Alert Center cannot be personalized.

- H. When you choose 'Email' as one of the channels, you can add the subject line and edit your message. There are options to add pictures too.



-
- I. If you choose the TTS channel, the message box appears the same way as it does for the SMS message.



4. Data Management Information

- A. One of the best parts about this alert system is that alerts can be sent out based off the needs of the district and therefore, several lists can be created to manage staff, parents/guardians and students.
 - This way, the message you are sending will only go to the people it needs to.
 - For example, if there are parent teacher conferences for the elementary school, the middle and high school parents do not need to get sent this message.
- B. You can break down the parents and guardians by grade level as well for further customized messages.
 - Example, 6th grade has a field trip and students need a signed permission slip.
- C. Attendance lists can also be set up using the student management system. These lists are set up during the migration process with data integration. The student lists are updated once a day at a specific time (set based off preferences). The attendance lists are updated at a specific time in the morning (Designated by the school).

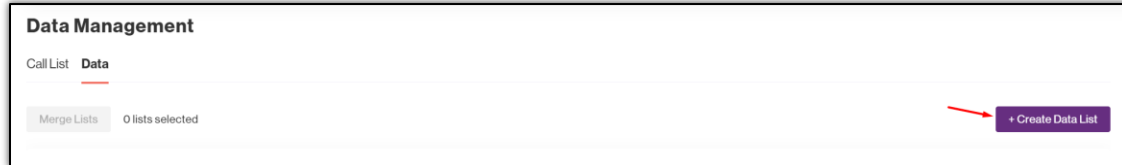
- Once the information has been integrated from the student data management systems, you can go in and create lists based off the needs of the district.

5. Recurring Alerts

- These alerts can be personalized.
- You can create message templates.
- Recurring alerts can be made inactive and active

6. How to Create New Data Lists

- As an example, I created a new data list by entering the help desk numbers in an excel sheet.
- Go to Data and click on Create Data List



- Add the List Name and upload the excel file.

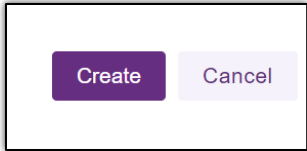
The screenshot shows the 'Create Data List' form. The 'Name & Upload' tab is active. The 'List Name' field contains 'Help Desk New'. The 'Attach Excel/CSV File' section shows a file named 'test info data.xlsx' with a 'Browse' button. At the bottom, there are 'Next' and 'Cancel' buttons.

- Match the data with the appropriate label tag. The text box on the bottom left can be edited.

The screenshot shows the 'Create Data List' form with the 'Column Names & type' tab active. A 'List Preview' table is displayed with columns for 'BIS', 'ID', and 'Help'. A dropdown menu is open for the 'ID' column, showing options like 'Numerical Value', 'Text Value', 'Phone Number', 'Email', 'Date', 'Time', 'DateTime', 'Do Not Import', and 'Language'. Below the preview, there are input fields for 'BIS', 'Help', and 'Phone Number', each with a corresponding dropdown menu for selecting the column type.

BIS	ID	Help
Data	607-766-3724	607-763-3592
eSchoolPlus	607-763-3591	607-763-3591
FST	607-766-3936	607-766-3936

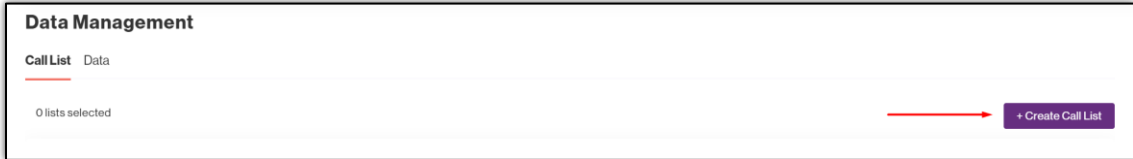
- Click Create



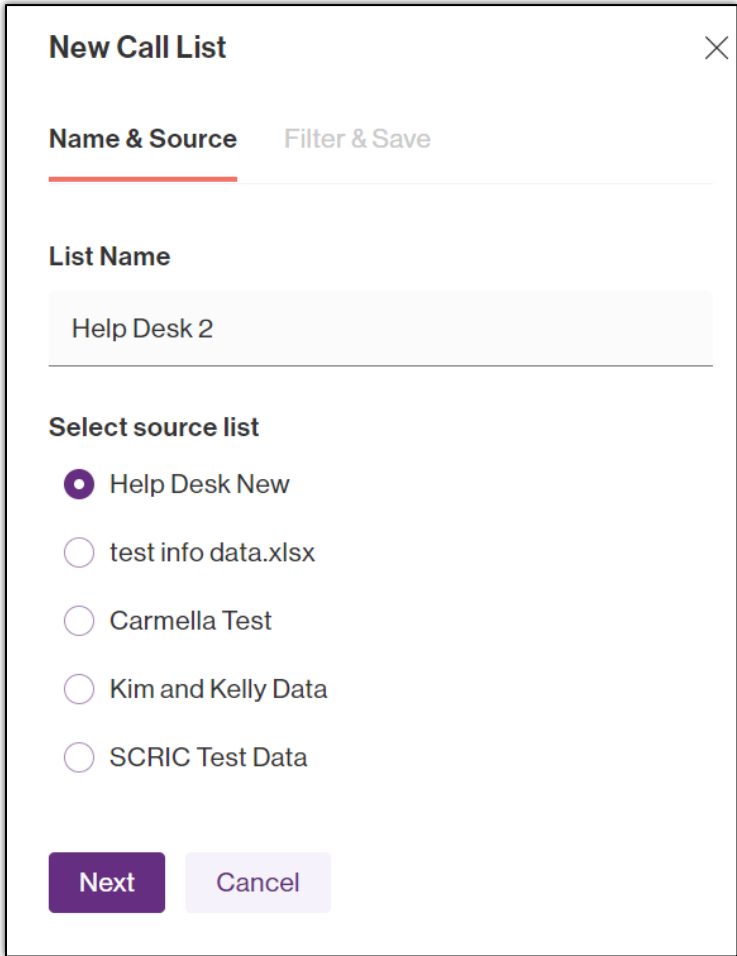
F. You will see your Data list here:



G. Then, to use the data list and **create a call list**, go back to the 'Call list' section and click 'Create Call List'.



H. Enter your list name and choose your source list (this is the data list). Click Next.



I. You can filter out this source list if you do not want certain data in there, but generally, we click create call list.

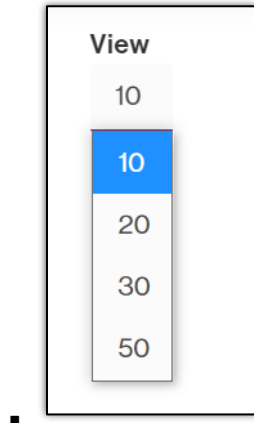
BIS	HELP	PHONE NUMBER
BIS	Help	607-766-3724
Data	Help	607-763-3592
eSchoolPlus	help	607-763-3591
FST	Help	607-766-3936

- The call list has now been created. Call lists with more than one contact can be filtered.
- J. You can now filter out by columns. With students, you will have information like first and last name, student ID, grade level, etc. From the main source list, you can filter the data to create lists for grade levels and buildings.

- K. If you click the 'Select IDs' toggle to ON, you can then check specific contacts to filter out a list. Then, you can create a list from the selected users.
- An example of this is when sending attendance calls. Often, parents/guardians will call to excuse an absence in between the time where the data is pushed to Apptegy and the time when the call goes out. If you do not need to call specific contacts, leave their boxes unchecked and then create the call list from the selected contacts.
 - A good housekeeping practice is to label these attendance lists 'School name Attendance Date'.

Note: If you need to create a new list every day for attendance, do not set up a recurring alert for attendance calls.

- L. When viewing the data, click this box and you can view up to 50 contacts per page.



Note: Most data lists are created during the migration process, so unless a new set of data is needed, you most likely won't need to do this.