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

Adding a New List
Adding a list is simple.

1. Click the Broadcasts tab.

2. From the List Builder, click the Add New List button.
3. You are now in the List Editor. Enter the name for your list. (For example, “All Students” or “Staff”). Be sure the list name describes who is in it – not the type of message you are planning to send.
Adding Rules to Your List
One of the easiest ways to add a group of people to your list is by defining rules. Rules allow you to define groups of people who meet certain criteria. For example:

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

1. Click on the Select a Field drop-down menu. We’ll create a list of All Students.
2. Select *Contact Type* from the drop-down menu.

3. Select *Criteria is*.
4. Choose *Student*
5. Click *Add*
6. Confirm that the Total count is similar to the total number of students in your school.

7. Click the Done button at the bottom of the page.
8. Your All Student List is now saved and can be viewed or edited under the Broadcasts → Lists menu.

9. You can continue to build lists using Rules by following the same steps above. You also can use multiple rules to build a list. For example, to create a list of 12th Grade Boys:
   a. From the Lists page, click Add New List.
   b. In the List Editor, from the Rules Drop Down menu, choose Grade is 12, and click Add.
   c. Choose another field; in this case, Gender is M. Click Add.
   d. Then click Done at the bottom of the page.
Additional List Tools
Creating a list using rules assumes you want to grab a group of people based on specific criteria. You can also create lists using the Additional List Tools.

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

Manually Entering Contacts
1. Click the Enter Contacts button.
2. Enter the individual’s contact information into the appropriate fields. You may also choose how this person is contacted based on the notification type preferences by checking the appropriate boxes.

3. Add Email and SMS Text phone number information as required.

4. Click the Done button at the bottom of the screen to add this person to your list.
5. This will also add the person to your personal Address Book. You can add this individual to future lists by simply using your Address Book.

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

[Note: To remove a manually added individual from your list simply uncheck the box next to the individual's name in the Additions section of the List Editor window, then click the Refresh button.]

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

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

2. Enter the individual's name, phone number, ID number, or email address in the search field.
3. Click the Search button to display the results of your search.

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

5. Click Done to save your changes or continue building your list.
6. To remove individuals from your list, simply uncheck the box next to the individual’s name. Then click **Refresh**.

**Uploading CSV File Lists**

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

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

3. Browse to select the file you wish to upload.
4. Click *Preview* to view the file data.

![](image1)

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

![](image2)

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

![](image3)
7. If your uploaded list looks correct, click the Save button. If you need to upload a different file, click the Select Different File button. If you would like to exit without saving your list, click the Cancel button.

8. Once you are back on the List Editor page, review your list to make sure you have the recipients you want.

9. Click Done to save your list and return to the List Builder page.