



INSTANT CONNECT

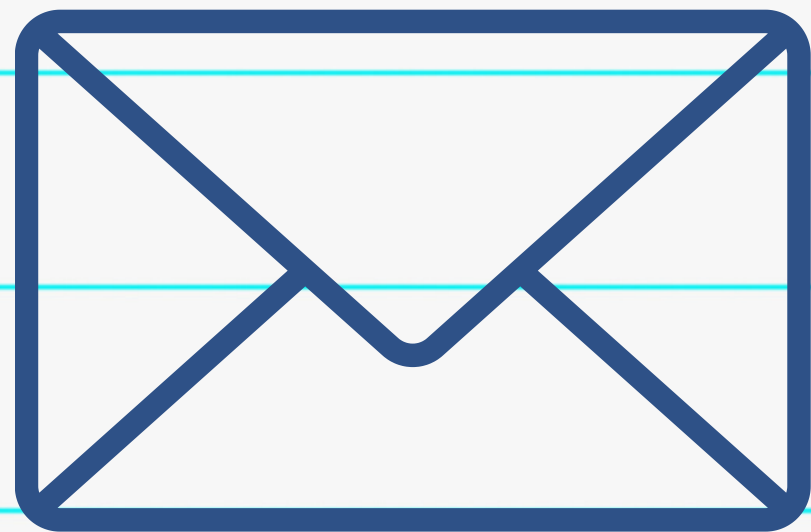
TRAINING MANUAL

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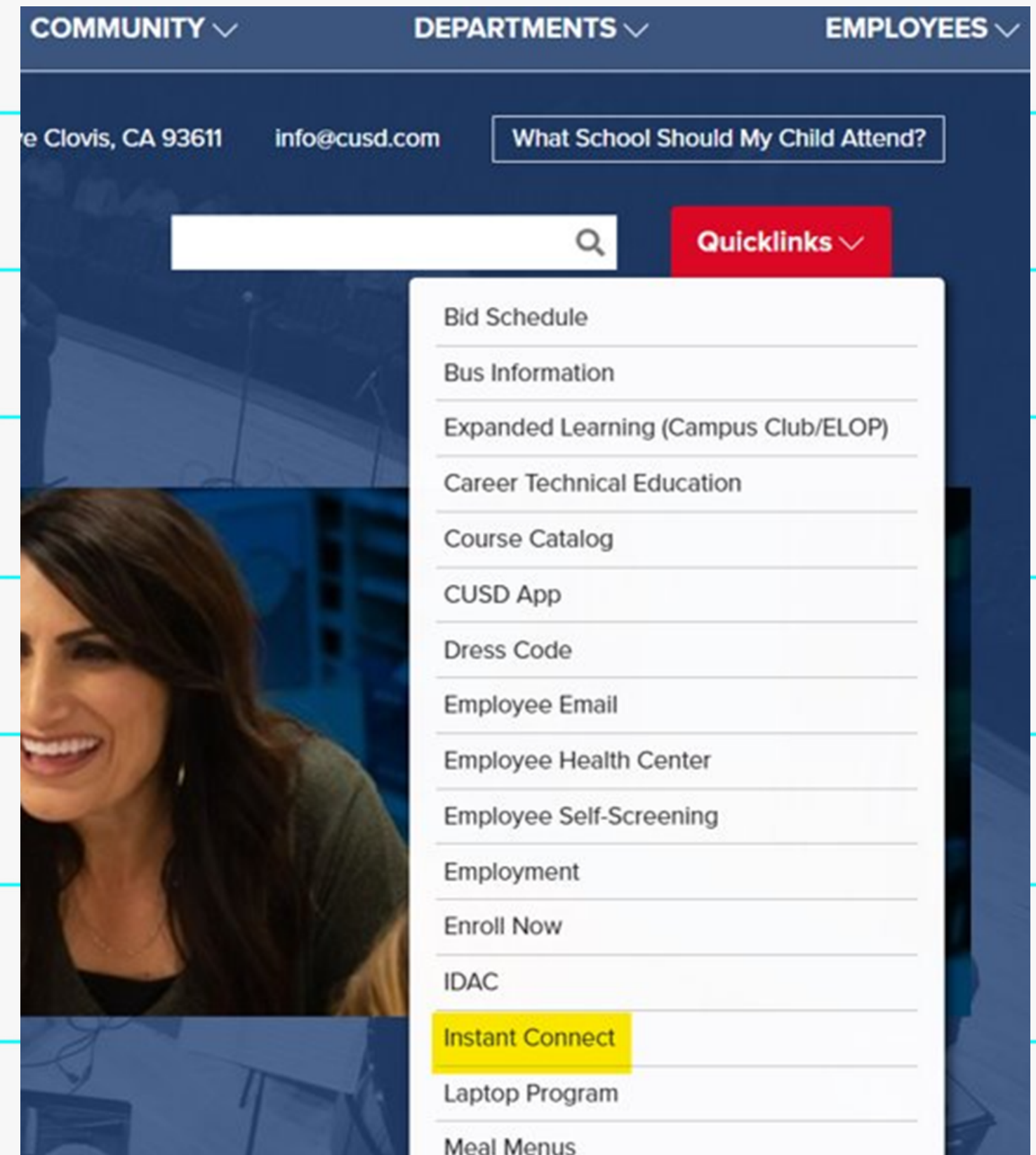
WHAT IS INSTANT CONNECT?

Instant Connect is the mass notification system used to send out emails, phone calls, and text messages to your school community.



LOGGING IN

- How to log in:
- Username: your CUSD email address
 - Use the LONG version:
kendrabort@clovisusd.k12.ca.us
- Password: your CUSD password
 - Same as your email, computer



DASHBOARD LAYOUT

Welcome, Clovis USD

Instant Connect Central

My Lists Create List Active BrightChats Reports

Current Jobs Running
No jobs currently running.

Scheduled Jobs

- Annual Information Update Send Out Reminder 7.24.23 -- 602 contacts. Sent by Miramonte. Scheduled for: 07/24/2023 10:00 am
- Red Bank Students -- 822/829 contacts. Sent by RedBank. Scheduled for: 07/17/2023 07:30 am
- Red Bank Students: Copy 2 -- 822/829 contacts. Sent by RedBank. Scheduled for: 07/17/2023 07:30 am
- Red Bank Students: Copy 3 -- 822/829 contacts. Sent by RedBank. Scheduled for: 07/24/2023 07:30 am

This Week

Day	Messages Sent
06/19	0
06/20	9
06/21	0
06/22	5
06/23	0
06/24	0
06/25	0
06/26	1

1. Menu

2. Quick access links to common pages

3. Current messages sending out

4. Scheduled messages

5. Total number of messages sent over the last week, by day

"MY LISTS" LAYOUT

The screenshot shows the 'My Lists' interface. At the top, there is a title 'My Lists' and a search bar. Below the search bar is a grid of folder buttons. At the bottom, there is a table of list information. Three red circles with numbers 1, 2, and 3 highlight specific elements: the main menu icon, the 'SELECT AN ACTION' button, and the list information table.

1

2

3

Name	Contacts	Status	Type	List Updated	Message Sent	Message Changed
Red Bank Attendance (sync) [RedBank]	0		↻	8/2/23	6/9/23	None
Red Bank PM Attendance (sync) [RedBank]	0		↻	8/2/23	6/9/23	1/29/21

1. Main Menu

2. Select an Action menu

3. List information (list names, contacts, last updated, last message sent, etc.)

"SELECT AN ACTION" MENU LAYOUT

 Create a folder	
 Create a list	• Create a list
 Create a new message	• Start a new message
 Edit prior message	• Edit an existing message
 Send saved message now	
 Stop sending/pending message now	• Stop a currently-sending message
 Copy a list	• Copy an existing list
 Create a subset list	• Create a list from an existing list
 Create a superset list	
 Delete a list	• Delete a list
 Add list to favorites	

SENDING A MESSAGE

1 Clovis USD Lists (159)

<input checked="" type="checkbox"/> Name	Contacts	Status	Type	List Updated	Message Sent	Message Changed
<input type="checkbox"/> test	0/5			6/8/23	3/3/23	6/12/23
<input type="checkbox"/> Form for Transferred Out	2852			5/5/21	5/5/21	5/5/21

2 List Name

Search

Hide Disabled Contacts

<input type="checkbox"/>	Edit	Delete	Name	Contact Information
<input type="checkbox"/>			Burt, Kendra	5593279030, kendraburt@cusd.com, kendra.burt5678@gmail.com

1. Click the name of the list you want to send a message to.

2. Click "Create Message". then, click "OK" if you are creating a brand-new message.

a. If you have a message you want to save and send periodically (attendance calls, etc.), simply choose "Edit Message" instead of "Create Message".

SENDING A MESSAGE

List Name: test 0/5 contact(s).

SELECT MESSAGE TYPES

LOAD PRIOR MESSAGE

PROCEED

Message Types to Send

- Email
- Texting
- Voice
- Social Media Post
- Push Notification

Message Name (optional)

Message Priority

Informational Emergency

NEXT

3. Choose the type(s) of message you want to send.
4. Name your message (optional).
5. Choose your message priority (informational or emergency)
 - a. Informational: for sending information to your families (i.e. upcoming events)
 - b. Emergency: used to reach **all** parents, even those who only consent to emergency messages (school lockdown, urgent information, etc.)

SENDING A MESSAGE - EMAIL

6

From Name

CUSD Today: 2 Minutes Today

7

From Email

notification-Do_Not_Reply@target.brightarrow.com

8

Subject

CUSD Today: March 2023 2 Minutes Today, TBEC

9

ATTACH

merge field

Translate email to contact's language

ADVANCED

TEMPLATES

IMAGES

HTML Source View

Paragraph

I U S A A AI x₂ x² “ ” := ½

10

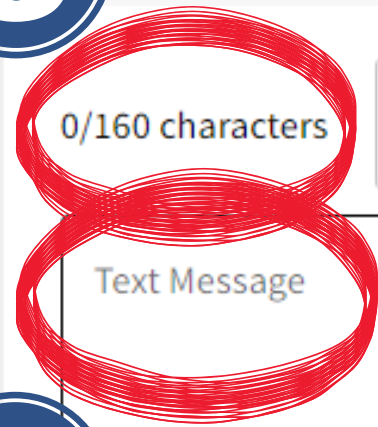
6. From name: who is the message coming from?
7. From email: should be pre-set already, no need to change.
8. Subject: the subject line of your message.
9. Add attachments/images with these buttons.
10. Write your message here.

6-8:

These will carry over from the previous message sent, so make sure to check and update these every time you send a message!

SENDING A MESSAGE - TEXT MESSAGE

6



0/160 characters Mail merge field Link to Email Message Translate text to contact's language

Text Message

8

7

6. Character count: While there is no limit on text message characters, any message over 160 characters will be converted into a link for the user to click on to view the entire message in a web browser on their mobile device.

7. Write your text message here.

8. This will pull the text content of your email into a text message. **It will not pull over any images or attachments in your email to the text message!**

SENDING A MESSAGE - VOICE CALL

Voice Message

BACK NEXT

Recorded Voice Computer Voice Recorded Voice with Mail Merge Field Survey

Send Audio Message

RECORD

Record alternate languages

6. Choose how to record your message: record it yourself or use a computer voice (*we recommend recording your own message*).

7. Click the “Record” button to open the recording options menu.

8. Choose your recording method. ***Messages can be no longer than 2 minutes!**

9. Remember to click “Apply” to save your changes.

Recording Message

1. System calls your phone, or

Phone Number Ext. RECORD

2. You dial into telephone number, or

RECORD

3. Import audio file

Important: The import file must be: either .m4a, .mp3, or .wav (only 8KHz, 16-bit, Mono)

Selected file: None.

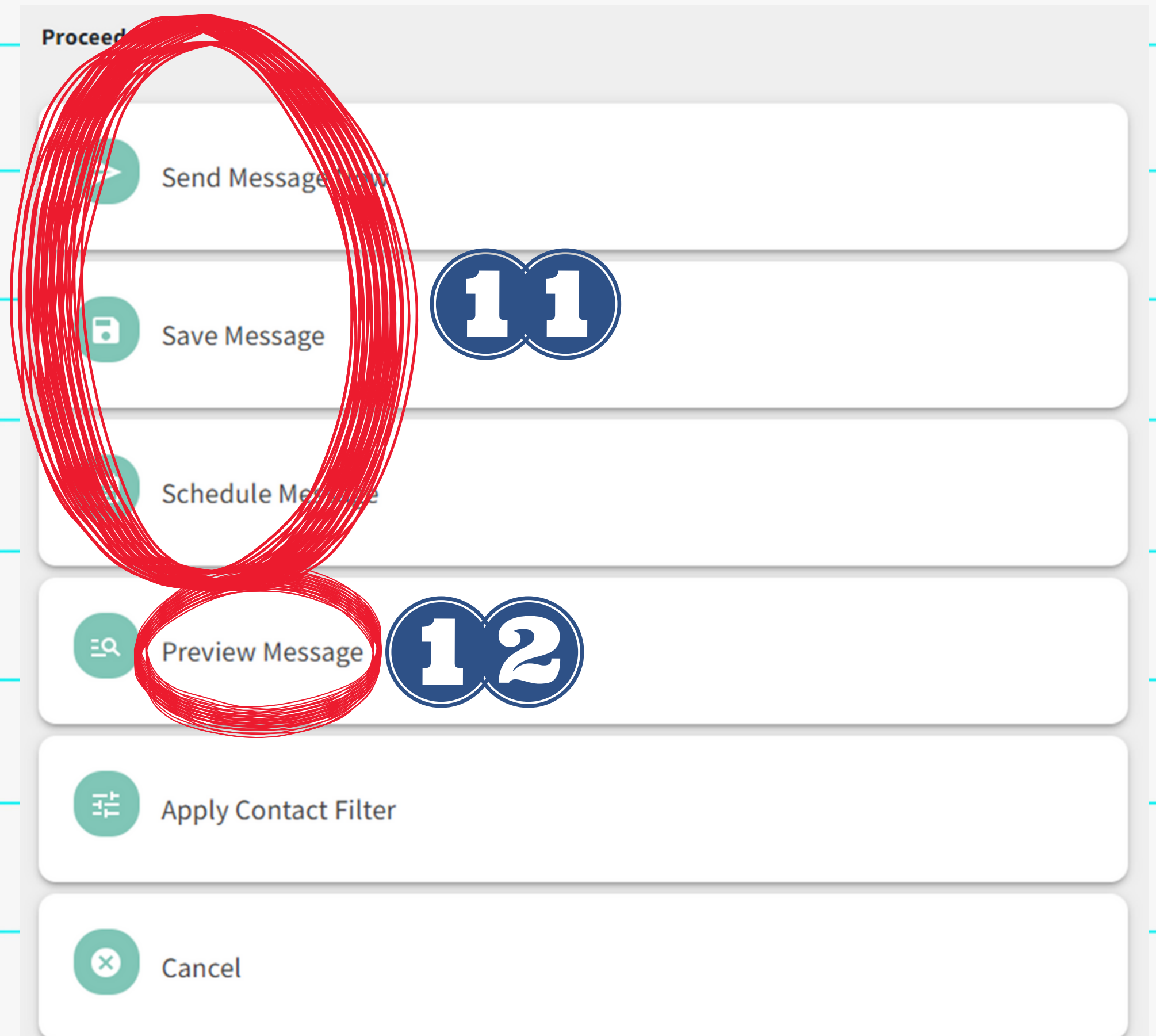
CHOOSE FILE

CANCEL APPLY

SENDING A MESSAGE


11. Choose to Send Message Now, Save your progress, or Schedule the Message to send later.







12. You can also Preview your message to the email address/phone number of your choosing.



EMERGENCY LISTS



Bud Rank Lists (15) 

<input checked="" type="checkbox"/> Name	Contacts	Status	Type	List Updated	Message Sent	Message Changed
<input type="checkbox"/> Bud Rank - Parents (linked) [multiple owners]	676		 	6/12/23	6/12/23	6/12/23
<input type="checkbox"/> Bud Rank Attendance (sync) [Bud Rank]	0			6/26/23	6/9/23	8/30/22
<input type="checkbox"/> Bud Rank PM Attendance (sync) [Bud Rank]	0			6/25/23	6/9/23	10/26/21
<input type="checkbox"/> EMERGENCY Bud Rank (linked) [Bud Rank]	676			6/12/23		None
<input type="checkbox"/> Site (linked) [Bud Rank]	80			6/12/23	3/9/23	3/9/23

- A list with the word "EMERGENCY" in the name will **AUTOMATICALLY** apply the emergency-priority settings:
 - Faster dial speed
 - Priority sending
 - Sending to emergency-only contacts as well as those who agree to all messaging

CREATING A LIST (WITH CONTACT INFO)

1. Create an Excel sheet with the contact information.

a. Include Student IDs, first name, last name, phone numbers and email addresses in their own columns

2. Click "Create a List" from the "Select an Action" menu.

2



Instant Connect Central



Create a folder



Create a list



Create a new message



Edit prior message



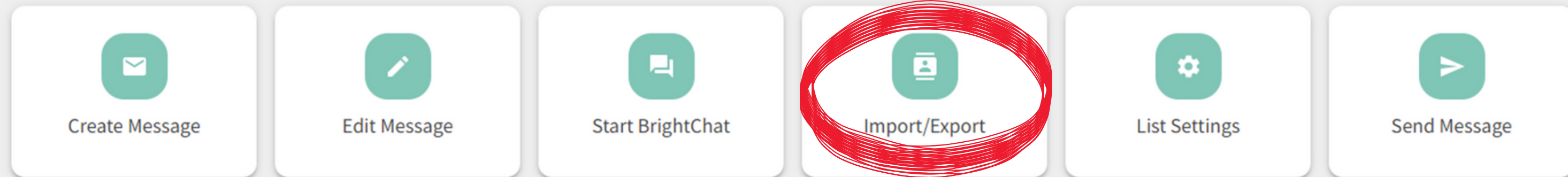
Send saved message now



Stop sending/pending message now

CREATING A LIST (WITH CONTACT INFO)

4



3. Name your list.

4. Click "Import/Export" to import your Excel file.

CREATING A LIST (WITH CONTACT INFO)

The image shows a dialog box for importing contacts. At the top, there are two radio buttons: "Import Contacts" (selected) and "Export Contacts". Below this, it says "Selected file: None." There are three buttons: "CHOOSE FILE", "IMPORT FILE", and "CANCEL". Below the buttons are four checkboxes: "Clear list before import" (checked), "Replace only entries found with matching Contact ID", "Keep old settings for updated contacts (keep unchecked if adding new contacts)", and "Load data from the selected list that matches imported Contact ID".

5

6

Import Contacts Export Contacts

Selected file: None.

CHOOSE FILE IMPORT FILE CANCEL

Clear list before import

Replace only entries found with matching Contact ID

Keep old settings for updated contacts (keep unchecked if adding new contacts)

Load data from the selected list that matches imported Contact ID

5. Choose a file to import (your Excel file).

6. Click "Import File". If you have multiple sheets in your Excel file, select the one you'd like to import.

CREATING A LIST (WITH CONTACT INFO)

CHOOSE FILE IMPORT FILE **ACCEPT AND PROCEED** CANCEL

Excel Spreadsheets
No Survey Response ▾

Clear list before import
 Replace only entries found with matching Contact ID
 Keep old settings for updated contacts (keep unchecked if adding new contacts)
 Load data from the selected list that matches imported Contact ID

Please use the drop down boxes below to adjust and confirm your data mapping, and then press "Accept and Proceed."

7

1	2	3	4	5	6	7	8	9	10	11	12
Contact ID ▾	First Name ▾	Last Name ▾	Not Used ▾	Phone 1 ▾	Not Used ▾	Not Used ▾	Not Used ▾	Not Used ▾	Not Used ▾	Phone 2 ▾	E-mail 1 ▾
150050420	Yabsira	Abejie	Abejie Yabsira Belayneh	Buchanan High	5181757492	E230	HSDiplomaGraduate	Buchanan High	Meheret Gebremeskel : Mother	(617) 935-4098	bemeheret@yahoo.com
702029359	Khaled	Abu-Salim	Abu-Salim Khaled Ehab	Buchanan High	9489675205	E230	HSDiplomaGraduate	Buchanan High	Reem Saleh : Mother	(559) 405-0137	reem_yaqoub@hotmail.com

7. Ensure each column is properly labeled using the drop-downs.

8. When done, click "Accept and Proceed".

CREATING A LIST (WITH NO CONTACT INFO)

1. Create an Excel sheet with the ID numbers of the students you want to include.
2. Create your new list (follow the steps for Creating a List, up to Step 3).
3. Send your Excel sheet to KendraBurt@cusd.com along with the name of the list you created.
 - a. I can import the contacts and link the ID numbers with the master All Students list that syncs nightly with Q.



CREATING A SUBSET LIST

Helpful for creating a list from a small selection of a larger list:

- i.e. Grade level lists

1. Check the box next to the list you want to pull information from. (Use your "all students" list that syncs nightly with Q.

2. Click "Create a Subset List" from the menu.

Clovis North High Lists (8) ↻

<input type="checkbox"/>	Name	
<input type="checkbox"/>	Clovis North High Attendance AM (sync) [Clovis North High]	
<input type="checkbox"/>	Clovis North High Attendance PM (sync) [multiple owners]	
<input type="checkbox"/>	Clovis North High Attendance Prior Day (sync) [multiple owners]	
<input type="checkbox"/>	Clovis North High Staff (linked)	
<input checked="" type="checkbox"/>	Clovis North Students (linked)	
<input type="checkbox"/>	EMERGENCY - Clovis North HS	
<input type="checkbox"/>	SS - Clovis North (linked) [multi	
<input type="checkbox"/>	template emergency [multiple	

1

2

Copy a list

Create a subset list

Create a superset list

Delete a list

Add list to favorites

CREATING A SUBSET LIST

3

Here you can create a Subset List that is a permanent filter of another list (the 'Source List'). This Subset List is automatically updated every time the Source List changes.

New list name

Keep linked to source list

4

Derived list's enabled contact state matches the source list.

If checked, the derived 'linked' list's contact checkboxes revert to the source list every time the source list changes.

Source List

5

Clovis North Students (2417 entries)

3. Name your list.

4. Make sure "Keep linked to source list" is checked! This makes sure your information stays up-to-date.

5. Choose your source list (it should default to the list you selected in Step 1).

CREATING A SUBSET LIST

Choose filters to define subset of list: 6

Field: Building

Comparator: Is equal to

Value: 418

Use dropdown list

Added filters:

ADD >>

<< REMOVE

Field

- | | |
|-----------|--|
| Building | Building: your school site (should only be one number) |
| Grade | Grade: grade levels of students |
| Language | Language: home language noted by parent in Q |
| Bus Route | Bus Route: (if student rides the bus) route number |
| Hm Room | Hm Room: N/A |
| Gender | Gender: gender of student |
| Custom 1 | Custom 1: N/A |

6. Set the filter that will determine who from the source list joins your subset list.

a. Field: category you use to filter your students.

b. Value: the options available in the category.

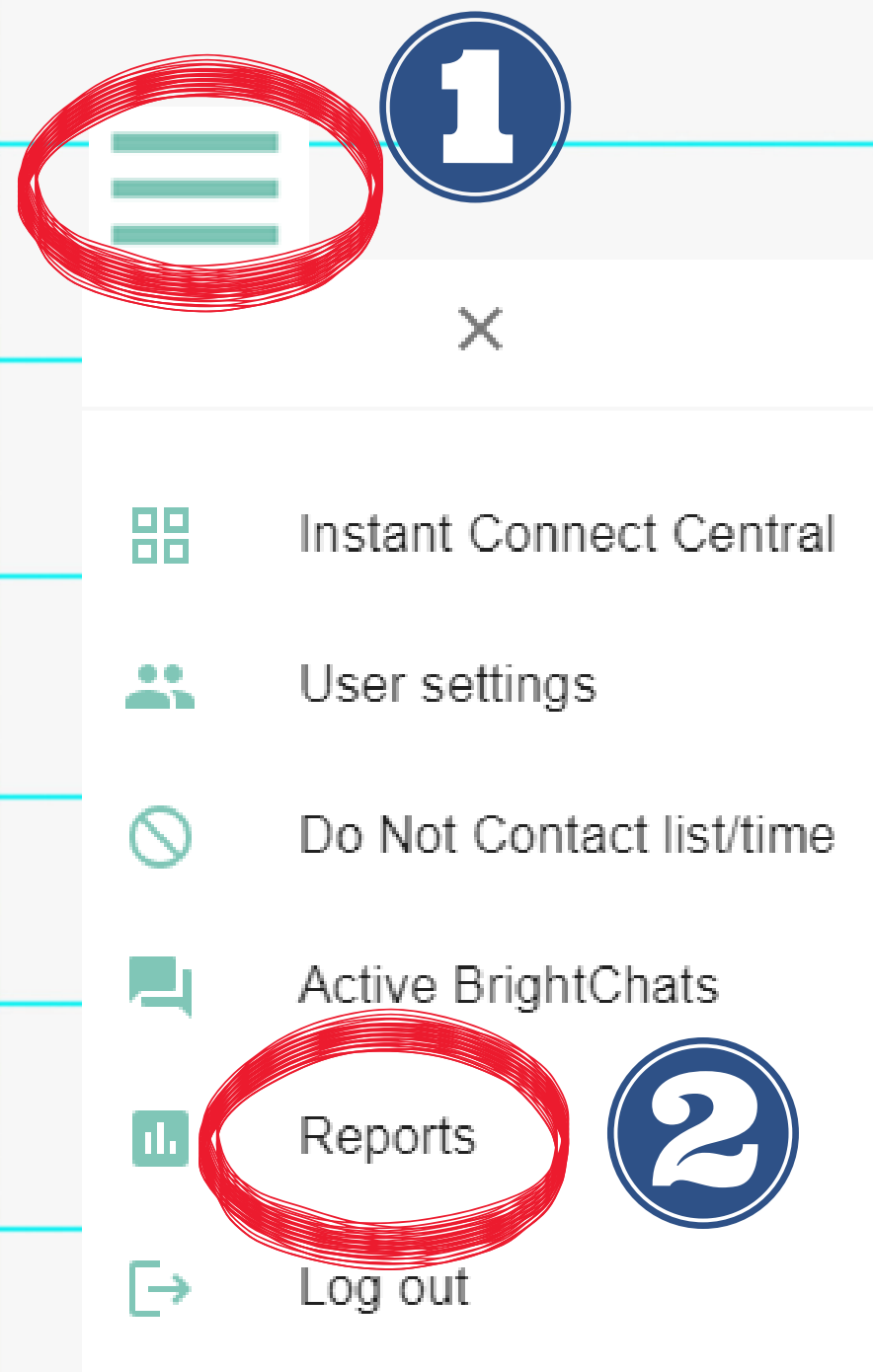
c. Once your filter is set, click "Add" to activate the filter. It will fill into the empty box on the right. Click "OK" when done.

DELETING A LIST

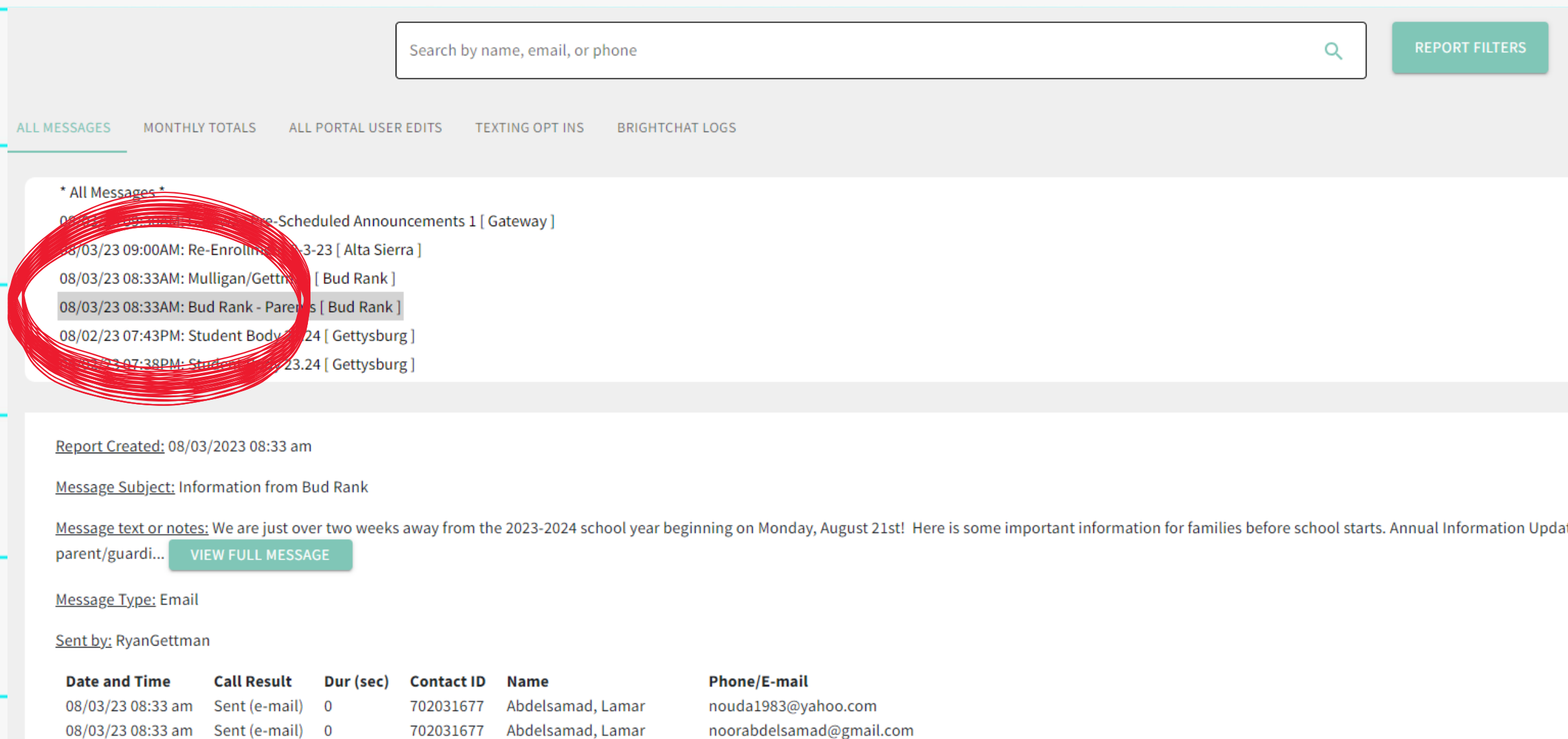
The screenshot shows a software interface for managing lists. On the left, a panel titled "Clovis USD Lists (1)" contains a table with a header "Name" and one row: "TEST LIST CN GRADE 10 (linked)". A red circle highlights a checkbox in the first column of this row. To the right of the table is a vertical menu of actions: "Copy a list", "Create a subset list", "Create a superset list", "Delete a list", and "Add list to favorites". A red circle highlights the "Delete a list" option. On the far right, a "Delete List" dialog box is open, asking "Do you wish to delete the following list?" and listing "TEST LIST CN GRADE 10 (linked)". The dialog has "CANCEL" and "OK" buttons, with a red circle highlighting the "OK" button.

1. Check the box by the list you want to delete.
2. Click on "Select an Action".
3. Click "Delete a List". Confirm you want to delete the list.

VIEWING REPORTS



The main menu is shown on the left side of the interface. It includes a search bar at the top with the text "Search by name, email, or phone" and a magnifying glass icon. Below the search bar are several menu items: "Instant Connect Central", "User settings", "Do Not Contact list/time", "Active BrightChats", "Reports", and "Log out". The "Reports" item is circled in red, and a blue circle with the number "2" is placed next to it. At the top left of the menu, there is a blue circle with the number "1" and a red circle around the three-line menu button.



The screenshot shows a list of messages and a detailed report for a selected message. The message list includes the following entries:

- 08/03/23 09:00AM: Re-Enrollment 23-23 [Alta Sierra]
- 08/03/23 08:33AM: Mulligan/Gettman [Bud Rank]
- 08/03/23 08:33AM: Bud Rank - Parents [Bud Rank]
- 08/02/23 07:43PM: Student Body 23-24 [Gettysburg]
- 08/03/23 07:38PM: Student Body 23-24 [Gettysburg]

The report details for the selected message are as follows:

- Report Created:** 08/03/2023 08:33 am
- Message Subject:** Information from Bud Rank
- Message text or notes:** We are just over two weeks away from the 2023-2024 school year beginning on Monday, August 21st! Here is some important information for families before school starts. Annual Information Update parent/guardi... [VIEW FULL MESSAGE](#)
- Message Type:** Email
- Sent by:** RyanGettman

Date and Time	Call Result	Dur (sec)	Contact ID	Name	Phone/E-mail
08/03/23 08:33 am	Sent (e-mail)	0	702031677	Abdelsamad, Lamar	nouda1983@yahoo.com
08/03/23 08:33 am	Sent (e-mail)	0	702031677	Abdelsamad, Lamar	noorabdelsamad@gmail.com

1. Open the main menu (3-line menu button in top left corner).
2. Click on "Reports".
3. Click on the message you want to learn more about. A report will open with the date created, message type(s), who sent it, and a list of each contact on the list, if the message delivered, contact information it was sent to, etc.

HAVE QUESTIONS?
LET ME KNOW!



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