

CORES™

Quick Reference Guide

Send a Message

Overview

This quick reference guide outlines several key messaging procedures such as sending a basic message, sending a recorded message, using advanced delivery settings, and more.

Message Terms

There are several terms to keep in mind as you construct and send messages.

Internal message – System delivery only. Recipients receive a notification that an internal message has been delivered, but can only read it by logging into their system.

Long message – Delivery options that allow extended formats such as email and fax.

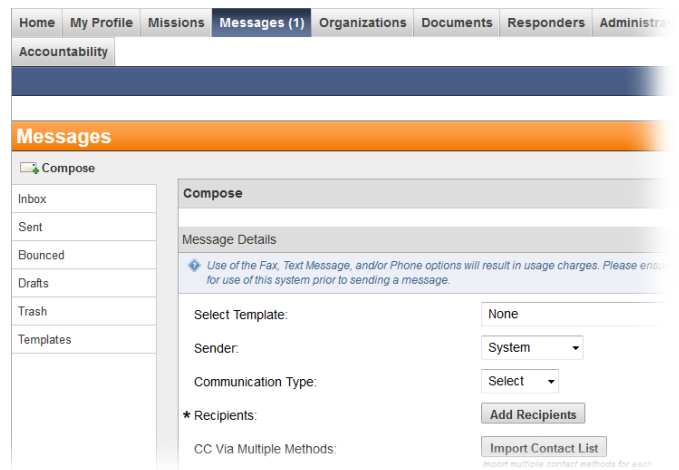
Short message – Display on devices with limited screen space such as pager and text messages.

Voice message – Audio delivery via telephone.

To Send a Basic Message

Follow these steps to send a basic message to one or more individual recipients.

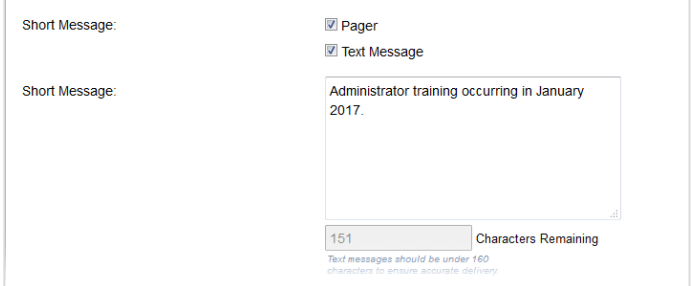
1. Go to **Messages**.
2. Click **Compose** toward the left side of the page.
3. Click **Add Recipients**.
4. In the *Search Center* window, enter details about the individual recipients you want to find and click **Search**.
5. Select the check box next to each intended recipient, and click **Add Individuals**.
6. Repeat steps 3-5 to add additional types of recipients such as groups and organizations.



To Send a Basic Message (continued)

7. Enter a subject for the message.
8. Choose the appropriate delivery methods for each type: long, short, and/or voice.
9. Enter the body of your message for each type: long, short, and/or voice.
10. Click **Send**.

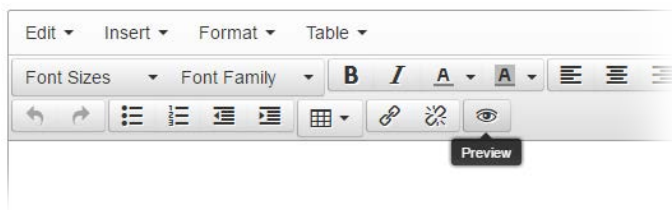
Tip: Use the **Preview** button in the long message body to preview your formatted text.



Short Message: Pager
 Text Message

Short Message: Administrator training occurring in January 2017.

151 Characters Remaining
Text messages should be under 160 characters to ensure accurate delivery.

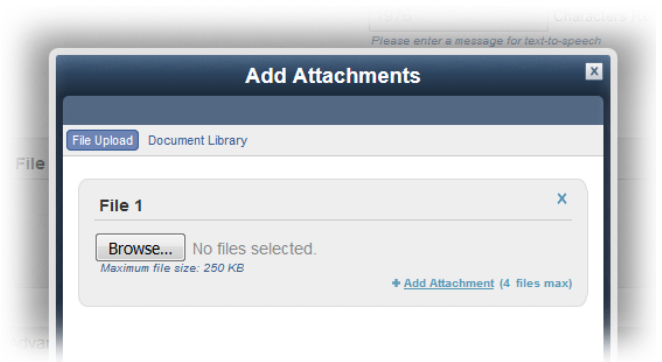


To Add an Attachment

When creating a message, you can quickly add an attachment. Follow these steps prior to clicking **Send**.

1. While on the *Compose* page, locate the **Add Attachments** button and click it.
2. In the *Add Attachments* window, browse for and choose a file on your computer, and click **Open**.
3. Click **Upload File**.

Tip: The **Document Library** tab is only available if your system is licensed for this function.



To Send a Recorded Message

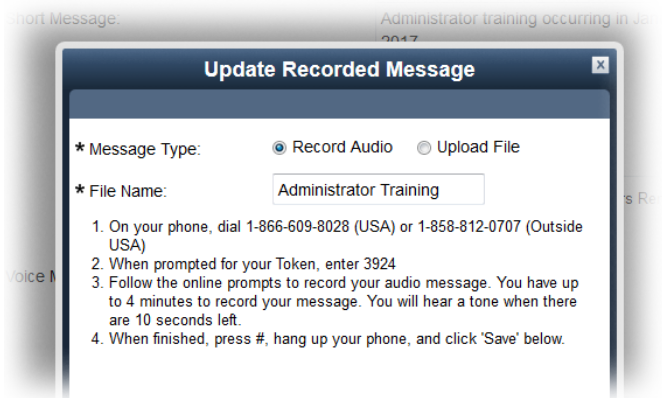
You have three options for sending a recorded message. You can have the system read the message you enter, you can record your voice, or you can upload a pre-recorded audio file.

To have the system read the audio:

1. In the **Voice Message** field, select **Phone**.
2. On the *Compose* page, in **Voice Message Body**, enter the text you would like to be read to all recipients. Recipients with TDD/TY devices also receive this message.

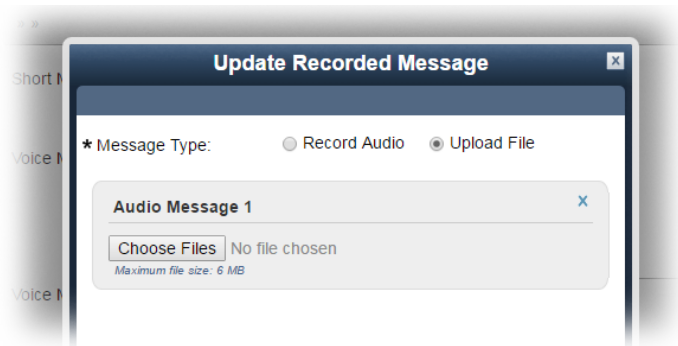
To record your voice for the audio:

1. In the **Voice Message** field, select **Phone**.
2. Click **Update Recorded Message**.
3. In the **Message Type** field, select the **Record Audio** option.
4. In **File Name**, enter a name for the recording.
5. Follow the instructions provided in the *Update Recorded Message* window.
6. Click **Save**.
7. On the *Compose* page, in **Voice Message Body** enter the same text as you used for the recorded message so that recipients with TDD/TTY devices can receive the message.



To upload an audio file:

1. In the **Voice Message** field, select **Phone**.
2. Click **Update Recorded Message**.
3. In the **Message Type** field, select the **Upload File** option.
4. Click **Choose File**, browse for and select an audio file from your computer, and click **Open**.
5. Click **Save**.



About Additional Message Options

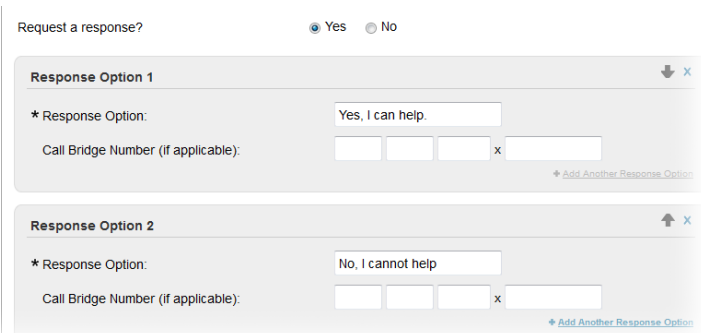
You have a number of advanced delivery options available to you when sending a message. Most options can be found in the *Advanced Delivery Options* section of the *Compose* page.

Field	Description
Delivery Delay	Set a time delay between the message being delivered via email and delivery to a phone, pager, or other text device.
Send Time	Choose Delay Until if you want this message to be delivered later and specify the date, hours, and minutes for delivery.
Priority	Choose Normal or High priority for the message. Selecting High flags this message as important in email systems that support this feature.
Message Delivery	Choose Escalation or Blast message delivery. Escalation tells the system to send the message to the first contact number and, if it fails, to try the remaining numbers until it is successfully delivered. This is best for everyday messages. Blast tells the system to send the message to every contact number for this recipient simultaneously. This option should only be used for emergency messages.
Time this message is available for response	Choose the number of hours that recipients can retrieve a recorded message or provide a response. This applies to messages that include response options.
Validate Recipient	Choose Yes if you would like recipients to verify their identity before hearing the message. This applies only to voice messages.
Leave Voice Message	Specify whether to leave the full message or to leave only voice message retrieval instructions. This applies only to voice messages.
Do not recontact if	Tell the system when to stop attempting to deliver a message. This applies only to voice messages.
Number of times to contact / Time between each contact attempt	Tell the system how many times to attempt to deliver a message and how frequently.
Request a response?	Indicate whether the message should request a response from the recipient.
Response Options	Specify the response options that are available to the recipient such as Message Received. Add up to nine response options as needed. If appropriate, leave a Call Bridge Number for each response option. Call bridge: You have the option to link a response option to a specific phone number so you can connect recipients to a call center or facility.
Do you want to save this message as a template?	Select Yes to save this message and its attributes as a message template that you can use in the future to help speed up message creation.

To Add Response Options

Follow the instructions for creating a basic message. Before you click **Send**, do the following:

1. In the *Advanced Delivery Options* section of the *Compose* page, select **Yes** for the **Request a response?** field.
2. In *Response Option 1*, update the text in the **Response Option** field.
3. If appropriate, enter the appropriate number in **Call Bridge Number**.



The screenshot shows the 'Request a response?' section with radio buttons for 'Yes' (selected) and 'No'. Below it are two 'Response Option' cards. Each card has a text input for the response option and a 'Call Bridge Number (if applicable)' field with a dropdown menu. The first card shows 'Yes, I can help.' and the second shows 'No, I cannot help.' There are 'Add Another Response Option' links at the bottom of each card.


To Add Response Options (continued)

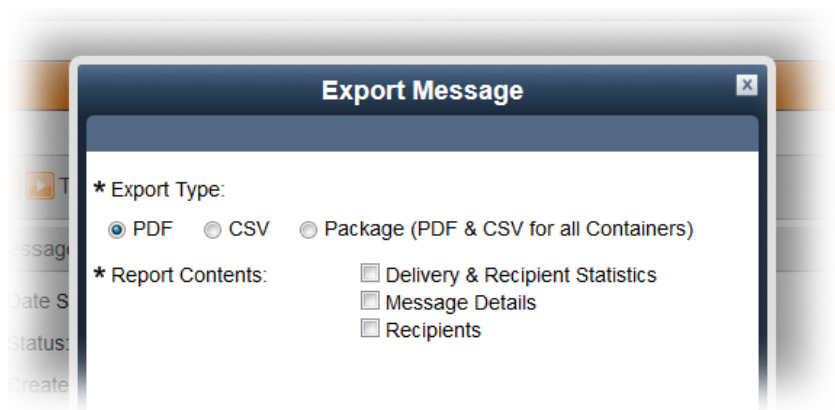
4. To add another option, click **Add Another Response Option**.
5. Repeat these steps for each additional response option.
6. Use the arrow icons on the right side of each section to set the order in which the recipient will hear the response options.

To Preview and Test Your Message

Use the **Preview and Test** button toward the bottom of the page to view the message and, if desired, to send yourself a test message.

To Export or Print Delivery Statistics

1. Go to **Messages**.
2. Select **Sent**.
3. Locate and click the appropriate message.
4. Click the export to file icon .
5. In the *Export Message* window, specify the **Export Type**.
 - PDF
 - CSV
 - Package (PDF & CSV for all Containers)
6. If you chose **PDF**, in **Report Contents** select the appropriate options.
7. Click **Download** or, if you chose the **Package** option, click **Save to Document Library**.



For more information, contact your Customer Success Manager or the support desk at 888-735-9559; in the support phone system, press 1 for Client Application Support and then 7 for Collaborative Fusion.