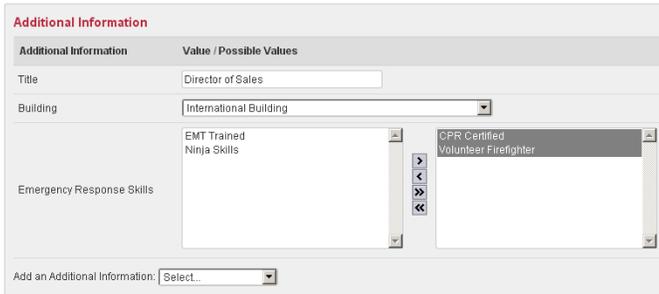
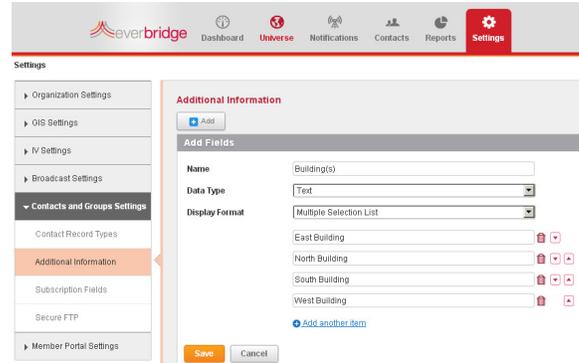


Quick Sheet MN: Additional Information and Rules

Creating Additional Information Fields

Additional information fields are a great way to use other information that will help you effectively target message recipients. Fields that are often leveraged by customers include building, shift, on call status and manager status. To create an additional information field, go to the settings tab, to contacts and groups settings and then additional information. To add a field click add, assign a name, determine the data type, the type of list (single selection, multiple selection, or free text), and then define the possible choices. Order the choices as desired and click save.

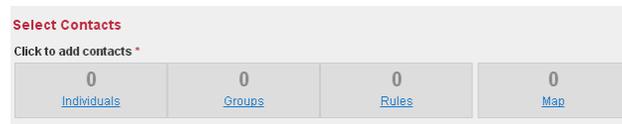
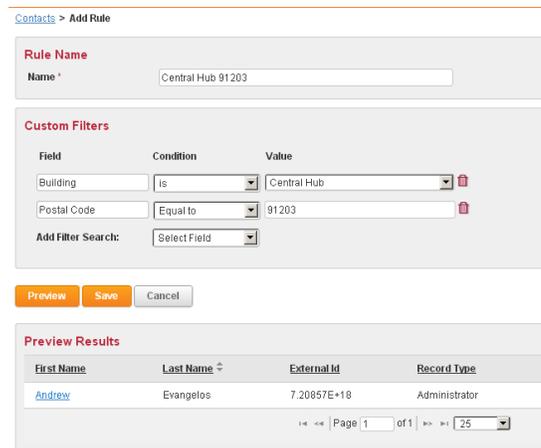


Adding Additional Information to a Contact

There are three ways to add additional information to a contact's record. This can be done through the contact management portal, as part of an upload, or through the member portal. In the data upload there is a column identifying the field and a subsequent field that determines the value. For a multiple selection field additional entries need to be separated by the pipe character | inserted using shift + backslash.

Rule Creation

A rule is a selection method that utilizes information within the contact record as a way to select recipients for a message. To create a rule, go to the contacts tab, then the rules sub tab and click add. A rule can contain one or more filters, for a contact to be selected from the rule, all of the conditions must be true. Each filter is a restriction that references the additional information fields. The conditions can be used to change the search. If you are referencing a multiple selection field, you can require multiple selections by holding the control key and selecting multiple attributes. To preview what contacts will be selected you can press the preview button, if you are satisfied with the rule click save and the rule will be added to the library.



Utilizing Additional Information for Notifications

There are two ways to use additional information to target a notification. The first is by selecting a pre defined rule to create a "smart group". The second way is through the advanced search while contacting individuals. This allows you to create a filter on the fly that will target the intended recipients. This is useful when you do not have a rule pre-built for a specific situation.

A note when using rules to select contacts: When using multiple rules you will be creating an "or" statement. Such as the contact is on the 3rd floor **or** they are in the West building. This will select all contacts on the 3rd floor of all buildings, **and** all the contacts in the West building. To select **only** the contacts on the 3rd floor of the west building, both filters need to be part of the same rule. This method will create the "**and**" statement that will produce the desired contact selection.