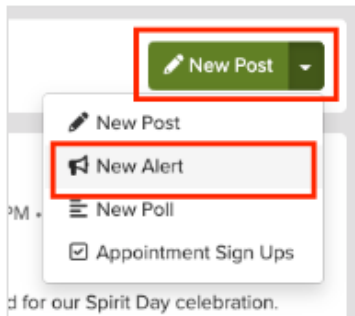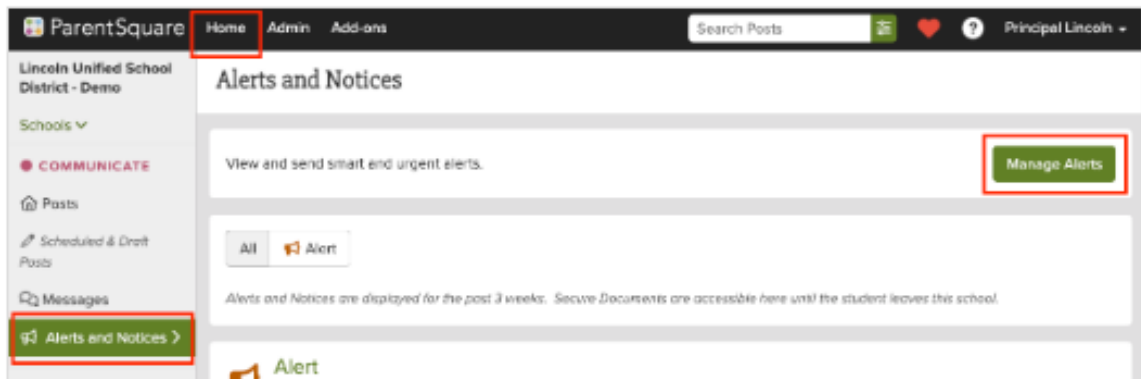# How to Create a Smart Alert

1. From **Home**, click the **New Post arrow** and select **New Alert**.

Or, from **Home**, select **Alerts and Notices** from the left sidebar, then click **Manage Alerts** to open the Alerts and Notices page.

2. Click the **New Smart Alert** button.

3. Enter the **Title for this Alert Message** (used internally).

4. Use default **From Number** or select a department number.

5. Under **Recipients To Notify**, there are three methods to select recipients (instructions below for each, color-coded):

   - **District, Schools, Classes, or Groups**
   - **Create a Custom Segment**
   - **Upload a CSV file**

6. Add recipients to Recipients to Notify. It can be School, Classes or Groups. Check the boxes for all that apply: **Staff, Parents, Guests or Students**.

When creating a Smart Alert, you can add recipients by using a **Custom Segment**. Custom Segments uses data from the SIS to provide data-driven filtering conditions to create on-the-fly, targeted alerts. For example, you can filter by grade and a role of "teacher" to send a grade level alert to teachers only.

Filtering conditions can be combined and can specify more than one value per condition. Users returned will be based on those users who meet the conditions which were set.

Note: The final count of recipients will be displayed on the Review step prior to sending and are adjusted based on individual notification preferences and the modalities that are used to deliver the alert.

1. To choose recipients for your Smart Alert, click **Custom Segment.**

2. To create the custom segment, choose a starting point. District staff can select District, Schools, Classes or Groups, while school staff can select their School, Classes or Groups.

3. Select a filtering condition from the drop-down.

4. Select a value. You can select multiple values for one condition.

5. Click **Add Condition** to add another condition.

6. Click **Update Count** to update the user count. The Smart Alert will be sent to the total number of recipients listed on the Review step.

New Smart Alert

Title for this Alert Message *This title is only used internally*

Early Release - Grades 6-7

Recipients To Notify

○ District, Schools, Classes or Groups **1** ◉ Custom Segment ○ CSV

2 × Nebula PureSyncTest District

Select users who match the following conditions:

3 Role ⌄ × Parent **4** 🗑

3 Grade ⌄ × Grade 6 × Grade 7 **4** 🗑

5 ⊕ Add Condition

6 ⟳ Update Count **40** Users

When creating an alert, you can add recipients by uploading a **CSV file**. *Note: If a CSV file is used for the list of recipients to notify, app notifications will not be sent. Text and email notifications will still be sent per the user's notification settings.*

1. To choose recipients for your alert, click Add Recipients by Uploading CSV.

2. Select from options and see example of CSV files below:

   - Upload CSV of Student IDs* (use this option if sending to parents of students already loaded into ParentSquare)
   - Upload CSV of Recipient Names, Emails, and Phones (use this option to send to recipients not in ParentSquare)

⊕ Add Recipients by Uploading CSV

| Upload CSV of Student IDs | *See an example file* |

| Upload CSV of Recipient Names, Emails and Phones | *See an example file* |

3. Choose a file or drag it into the upload file window.

Upload CSV File

Choose a file or drag it here.

Cancel

Example of CSV file with Student IDs (no limit to the number of students):

Example Student CSV File ✕

The file should be a single column of student SIS IDs. The header is optional.

student_id
657354
546747
572876
670964
641273

Example of CSV file with Recipient Names, Emails, and Phones (limit of 1,000 recipients):

Example Recipient CSV File

Please note that you must supply headers that exactly match the following requirements:

- Required
  - **full_name** or **first_name/last_name**
  - **email** and/or **phone**
- Optional
  - **language** (must be the two letter language code)

first_name	last_name	email	phone	language
Chloe	Bartell	chloe@example.com	8051234567	en
Daniel	Alvarado		8052222222	es
Emily	Boyer	emily@example.com		en

Back to sending a smart alert after reviewing all three methods to select recipients.

7. Enter **Text Message** (max 300 characters). Optional: click box on the right, **Do not send text**.

8. Send a **Voice Message**. There are four ways to record the message, see **below**. If you do not want to send a voice message skip this step.

9. Send an **Email**. Enter subject and message. *Note: email messages allow you to insert a link and other formatting options*. Optional: click box on the right, **Do not send email**.

10. By default, messages automatically translate to the recipient's language. See additional options **below**.

11. Click Next for send options, or Safe Draft to use later.

12. You'll see the **Review Smart Alert** page before you send. See example **below.**

13. By default, Smart Alerts are sent as a text message first and if the text fails then the recipient receives a voice call. To send both text and voice simultaneously, select **Click here to send both text and voice.**

14. Click **Notify** to send immediately, or **Schedule** to select a date and time to send.
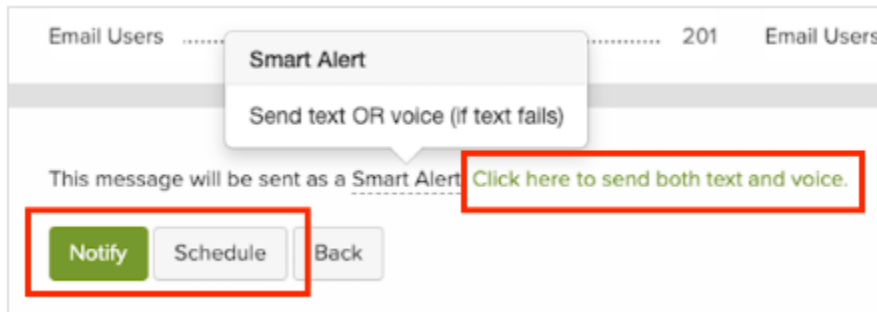
How to Record a Voice Message

To send a **Voice Message,** there are four ways to record the message. Click **Text-to-Speech Message** or **Record Message**. If you do not want to send a voice message skip this step.
Note: The preview call comes from a CA number. When the actual alert is sent, it will come from the Caller ID set on Admin>District or Admin>School.

1. **Text-to-Speech Message:** Enter the script into the text field. A computer voice will read your message aloud to recipients. *Note: Double-check your script for spelling errors as the computer will mispronounce them in the recording.*

   Text-to-speech languages auto-translated for Smart Alert voice calls include:

Chinese (Mandarin)	Italian	Romanian
Dutch	Japanese	Russian
English	Korean	Spanish
French	Polish	Swedish
German	Portuguese	Turkish

For best translation results, we recommend the following (tips provided by MSD of Wayne Township):

- Keep sentences short (20 words or less) and to the point with simple structure.

- Use active voice rather than passive. It's more direct, better understood, and easier to translate. Words like "was" and "by" may indicate passive voice. Example: The rock was moved by the landscaper = passive. The landscaper moved the rock = active.

- Check your text for slang and idioms. An expression such as, "You hit that one out of the park!" doesn't translate in an understandable way.

- Eliminate or spell out confusing abbreviations and acronyms.

- Use the same words consistently to convey the same concept. You should say that a CD was "inserted," "placed," or "loaded" into a CD player, but it will be more understandable if you pick one verb and stick to it.

- Spell-check your writing.

2. **Record on your phone:** In the pop-up window, enter your phone number, a script to help you record, and click **Call Me.** When you receive a phone call, record your message.

3. **Record on your computer:** When asked if you want to allow microphone access, click **Allow.** Type out a script to help you record, click **Start Recording** then **Save.**

4. **Upload a pre-recorded message:** Browse and select recorded file from your computer or drag into **Upload Recording** window.
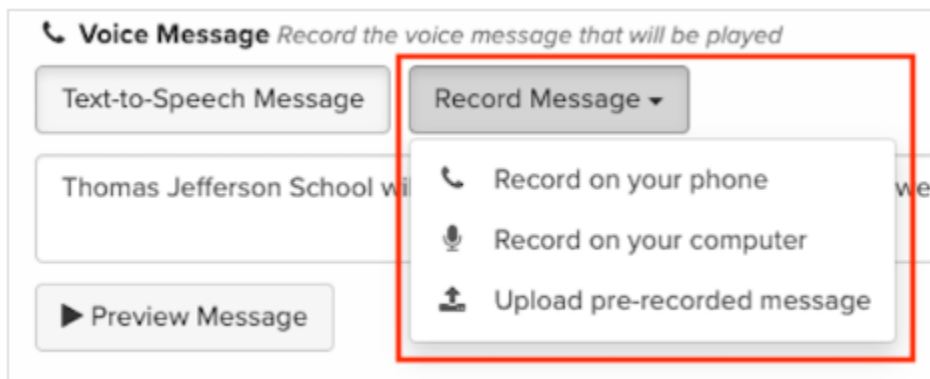
Language Translation Options

Smart Alerts are automatically translated to the user's preferred language by default. Several options are available to you.

1. Uncheck the box, **Automatically translate to the recipient's language**, to turn off automatic translations.

2. Click **Edit Translations** to edit or provide your own translations.
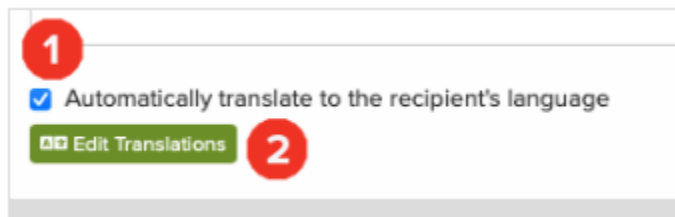
3. Click the **language tabs** to edit message. This example shows the message in Spanish.

4. If you make any changes to the English text, click **Retranslate from English.** *Note: any changes you made to the translated text will revert to the Google translation.*

5. Click **Next** or **Save Draft**.
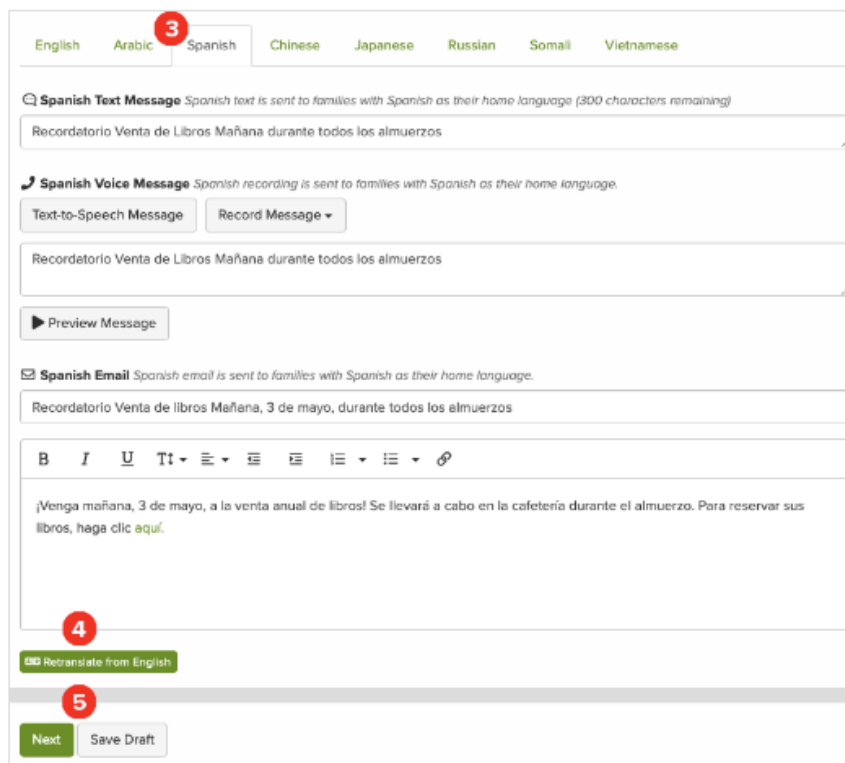
Review Smart Alert Before Sending

Before you send the alert, you'll see the Review Smart Alert page.

- Check how many users are expected to receive your Smart Alert, by message type and language.

- Review your messages and voice recordings in each language before you send.

Review Smart Alert

Book Sale Tomorrow
From: Rincon Point School - 452-444-2244
To: Rincon Point School
Total recipients: 264
Send to: Staff and Parents

English		Swedish	
Text Message	View Message	Text Message	View Message
Voice Message	View Message	Voice Message	View Message
Email Message	View Email	Email Message	View Email
Phone Users	55	Phone Users	0
Email Users	239	Email Users	1
Somali		**Spanish**	
Text Message	View Message	Text Message	View Message
Email Message	View Email	Voice Message	View Message
Phone Users	0	Email Message	View Email
Email Users	2	Phone Users	2
		Email Users	4
Arabic			
Text Message	View Message		
Email Message	View Email		
Phone Users	0		
Email Users	0		

This message will be sent as a Smart Alert. Click here to send both text and voice.

Notify   Schedule   Back