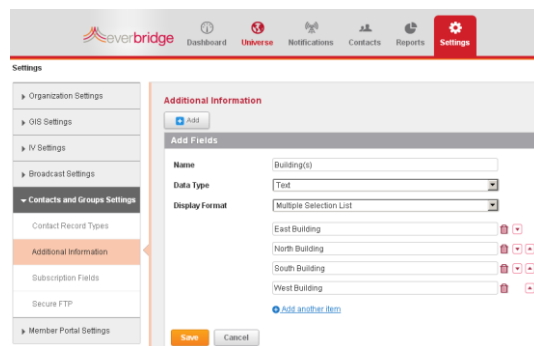
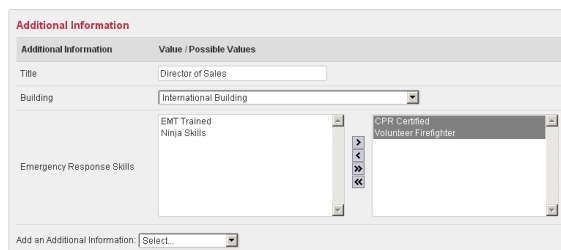


Quick Sheet MN: Additional Information and Rules

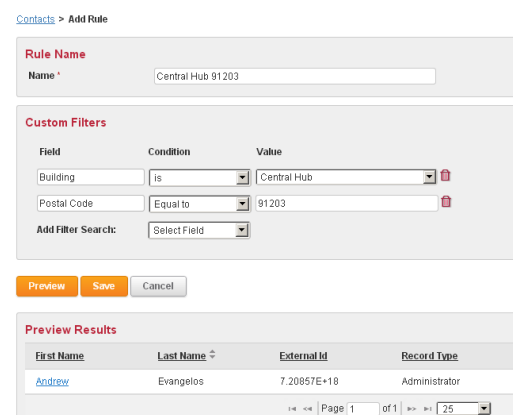
Creating Additional Information Fields

Additional information fields are a great way to leverage contact attributes to help you effectively target message recipients. Fields often leveraged by customers include building, shift, on call status and manager status. To create an additional information field, go to the Settings Tab > Contacts and Groups Settings > Additional Information. To add a field, click the add button, then assign a name, determine the data type, the type of list (single selection, multiple selection, or free text), and define the possible choices if using a selection list. Order the choices as desired and click save.

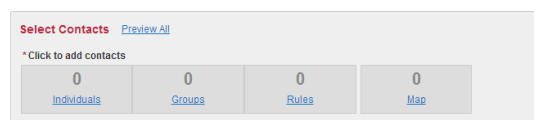
Adding Additional Information to a Contact

There are three ways to add additional information to a contact record: through the contact management portal, as part of an upload, or through a self-service member portal. If using the data upload, use the custom value 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 uses information in the contact record as a way to choose message recipients. 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 a database field. 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 which contacts will be selected, press the preview button. If you are satisfied with the rule, click save and it will be added to the library.



Using Additional Information for Notifications

There are two ways to use additional information to target a notification. The first is selecting a predefined rule to create a "smart group". The second is using advanced search while contacting individuals. This allows you to create a filter on the fly to target the intended recipients. This is useful when you don't have a rule pre-built for a specific situation.

A note about using rules to select contacts: When using multiple individual rules, you are creating an "or" statement: the contact is on the 3rd floor OR they are in the West building. Creating a single rule with multiple filters creates an "and" statement: the contact is on the 3rd floor AND they are in the West building.