

Sending Individual Messages

The screenshot shows the Slate system interface for a student named Kris Keys. The top navigation bar includes the Slate logo, a search bar, and a user profile icon. The main header displays the student's name, enrollment status, and ID. Below this is a navigation menu with tabs for Dashboard, Timeline, Profile, Materials, Class Schedule, Academic, Advising Notes, Early Alerts, and Registration Holds. The Student Dashboard section contains various information cards for Student ID, Academic Standing, Admit Term, Admit Code, Level of Study, Class Standing, College, Advisor, Overall Earned Hours, Registered Current Term, Advising PIN, Last Canvas Login Date, and Reg Activity Date. A 'Connect' dialog box is open in the center, showing three options: SMS (with a red notification bubble containing the number 2), Slate Voice, and Tel. The dialog also has a 'Close' button. On the right side, there are sections for 'Connect' (with contact info for Email and Mobile), 'Tags' (Legacy Student, Opt Out, Test Record), 'Unsubscribes' (No unsubscribes for email or mobile devices), 'Status History' (09/03/2024 Enrolled), and 'Populations' (Enrolled). At the bottom, there is a 'Biographic' section (Born 01/01/2024, age 1) and an 'Activity History' section with a timeline showing various events like Interaction, Event, Login, Email Sent, and Email Clicked.

You can search for a person's profile and select their Mobile number. Select SMS to send a message to this applicant.

This screenshot shows the same Slate system interface as the previous one, but with a 'Send Message' dialog box open. The dialog box has a title bar with a close button. It contains the following fields: 'Sender' (pre-filled with the system name), 'Recipient' (pre-filled with the mobile number +1 555-555-5555), and 'Message' (a large text input area). Below the message input, there is a character count: '0/160 chars (0.01 credits)'. At the bottom of the dialog, there are 'Send' and 'Cancel' buttons, along with a refresh icon and a help icon. The background interface remains the same, showing the student's profile and navigation options.

Sending Mass Messages

The screenshot shows the Slate web interface. At the top, the 'Deliver' section is active, with a 'New Mailing' button highlighted by a red circle '2'. A 'New Mailing' modal is open, showing the following details:

- Name: Test SMS
- Folder: Other / TEST
- User: Keys, Kris
- Method: SMS (highlighted with a red circle '3')
- Hide from Timeline:

The modal has a 'Save' button highlighted with a red circle '4' and a 'Cancel' button. The background shows a list of mailings with columns for Name, Method, Status, Start Date, and Updated. The sidebar on the right contains navigation links for Mailings, Status, All Mailings, All Folders, and Exclude/Include archived options.

Select Deliver > New Mailing > Method=SMS

Next you need to add your recipients either by Query or Spreadsheet Upload.

The screenshot shows the details for a 'Test SMS' mailing. The 'Edit Recipient Lists' button is highlighted with a red box. The details are as follows:

- Method: SMS
- Folder: TEST
- User: [Kris Keys](#)
- Recipient Lists: [New Test](#)
- College: IN Graduate School
- Current Status: Not Running
- Timing: Send upon activation

The 'Edit Recipient Lists' button is highlighted with a red box. The 'Edit Message' and 'Send Mailing' buttons are also visible.

Recipient List (Spreadsheet)

The screenshot shows the Slate interface with the 'Recipient Lists' section. A modal dialog titled 'Upload Spreadsheet' is open. The dialog contains the following text: 'Upload one or more Excel spreadsheets (.xls or .xlsx) containing a header row and one or more data rows. It is imperative that any merge field names match across all uploaded recipient lists.'

Filename	Size	Status
MSN_DNP Admits 20250207-182118.xlsx	67 kb	0%
	0 b	0%

At the bottom of the dialog, there are two buttons: 'Add Files' (marked with a red circle 2) and 'Start Upload' (marked with a red circle 3). A 'Close' button is located at the bottom left of the dialog.

Select Upload Spreadsheet > Add Files > Start Upload > Close

Column headers are used for merge field names.

Recipient List (Query)

The screenshot shows the 'New Query' dialog box in the Slate application. The dialog is titled 'New Query' and has a close button (X) in the top right corner. It contains the following fields and options:

- Name:** New Test
- Sharing:** Share query with other users with the query and query base permissions
- List Type:** Include
- Type:** Configurable Joins
- Category:** Records
- Base:** Person (with a dropdown menu open showing options: Application, Application by Population, Organization Contacts, Organizations, Person, Person by Population)

At the bottom of the dialog are 'Save' and 'Cancel' buttons. Three red circles with numbers 1, 2, and 3 are overlaid on the image to indicate key steps: 1 points to the 'New Query' button on the main page, 2 points to the 'Category' dropdown, and 3 points to the 'Save' button.

Select New Query > Set Type, Category, and Base

Select you Query filters and exports. Need at least Name and Mobile (SMS)/Email (Email)

The screenshot shows the 'Edit Query' page for 'New Test' in the Slate application. The page displays the following information:

- User:** Kris Keys
- Base:** Configurable Joins - Person
- Execution Mode:** Retrieve only the new records since query was last run

There are sections for 'Exports' and 'Filters':

- Exports:** Includes input fields for 'Person Name' and 'Mobile Phone', and buttons for 'Export', 'Literal', and 'Custom SQL'. A 'Rename Exports' link is also present.
- Filters:** Includes a 'Filter' button and a text input field containing 'College IN Graduate School'.

On the right side of the page, there is a vertical menu with the following actions: Edit Properties, Edit Permissions, Set Interaction, Preview Results, Display SQL, Snapshots, and Copy.

Setting Up Message

The screenshot shows the 'Edit Message' window in the Slate system. The 'Sender' dropdown is set to 'Mobile-Phone'. The 'Recipient' field contains the merge field '{{Mobile-Phone}}'. The message body is pre-filled with: 'Hi {{Person-Name}},', 'Type you message', 'Make sure to add the stop message', and 'To opt out of A-State SMS, reply STOP'. The character count is '112/160 chars (0.01 credits)'. The interface includes a 'Save' button and a 'Cancel' button. A sidebar on the right contains buttons for 'Edit Recipient Lists', 'Edit Message', 'Send Mailing', 'Preview Message', and 'Send Message'. A search bar is at the top right.

Select Edit Message from the message's main page. Place mobile merge field in Recipient line.

*Mass Messages need to include the recipient's name and an opt-out message that includes STOP.

This helps keep us listed as a trusted sender and prevents messages from being blocked.

Messages over 160 characters will be split into multiple messages

Send Settings

The screenshot displays the 'Send Mailing' dialog box within the Slate interface. The dialog contains the following sections and settings:

- Pre-Flight Checks:** No errors have been found. Pre-flight checks identify only the most common issues, so please still review your mailing before sending.
- Estimated Recipients:** 124 recipients eligible for immediate delivery. The recipient count is determined from the following lists:
 1. New Test (live) - 124 recipients
- Recipient Lists:** New Test
- Batch Size (optional):** Send max [] messages and suspend.
- Review:** This message is ready for review.
- Outbox:** Send to outbox and do not deliver automatically.
- Frequency:** Send mailing once
- Timing:** Send now
- Deduping:** Send only one message/recipient

At the bottom of the dialog are three buttons: **Send Mailing** (highlighted with a red circle 4), **Save Settings**, and **Cancel**. In the background, the 'Send Mailing' button in the right sidebar is highlighted with a red circle 1. A red circle 2 highlights the recipient count '124', and a red circle 3 highlights the 'Send now' dropdown menu.

Select Send Mailing.
Check Recipient number
Select Frequency, Timing, and De-duping
Select Send Mailing
Type SEND all caps when prompted

For more information on Slate messages visit:
<https://knowledge.technolutions.net/docs/sms>