User Guide
Messaging

August 2023

Contents

Product versions

The version of Sentral at your school may have a different user interface to the one shown in our YouTube videos and this guide. The features available are generally the same, although you may see differences because of the way Messaging is configured at your school.

Role-based permissions

Your access is assigned to you by the Sentral Administrator (Administrator) at your school. They can set permissions at a granular level, and this determines the type of access you have and the functions you can access in the Messaging module.

Access

- To access the Messaging module, select the Sentral menu icon (⠿) and then under Communication, select Messaging. The Messaging home screen displays.

Messaging home screen

Refer to the table below for a description of information on the Messaging home screen.

> ▶ **Video:** *Watch this video on our YouTube channel for an intro to the Messaging home screen.*
>
> *Messaging | The Messaging Home Page - getting started*

Reference number	Description
1	Lists a summary of recent messages.
2	Lists outbound messages and their status. Includes an Export button.
3	Action menu options – an alternative to selecting from the left menu.
4	Delivery status legend – indicates the status of each message
5	Top-up balance button – takes you to the Help Centre to complete a request

Message home screen – ST version

Send messages

Overview

Sentral Messaging allows you to communicate with your parent community via general emails and SMS messages. For example, you might use Messaging for newsletters, reminders of upcoming assemblies, notifications of buses that are running late or an excursion, etc.

To send an email

> ▶ **Video:** *Watch this demo on our YouTube channel.*
>
> *Messaging | How to send an SMS or email*

1. Select the Sentral menu icon (⠿) and then under Communication, select Messaging.
   The Messaging home screen displays.
2. Do one of the following:
   — Under Outbound messages, Select Action and choose Compose.
   — Select Send Messages in the left menu and choose Send SMS and Email.
   The Message screen displays.
3. Select Email as the message type.
4. Specify whether to turn on Send Message Read Receipt.

> ⓘ **Note:** *You only see this option if it was turned on in Messaging Setup by your Sentral Administrator.*

5. Do one of the following:
   a. (ST version) Leave the default information in the From Name and Email fields unchanged.
      This defaults to your school's email.

> ⓘ **Note:** *If this field is empty, there is no email address in Messaging Setup for Return Email Address Settings.*

   b. (ST version) Switch from School Email to My Email Address to use your personal school email address.
   c. (MT version) Select an email address to use as the From Email.

> ⓘ **Note:** *Your Sentral Administrator may have added email addresses for you to use. They may also have restricted email addresses for certain users.*

6. Add one or more contacts in the **To** field. Select ⊕ (Plus sign) and choose from:
   a. Cohorts

In Cohorts, select the cohort type and other details for cohort, and then select OK. The selected cohort displays in the To field.

> **Tip:** *The Cohorts option allows you to address messages to large groups of contacts without the need to manually select each contact individually. It excludes contacts that are grayed out and in italics. They won't be messaged due to the selected contact method being disabled.*

b. Groups

In Contact Groups, use the checkboxes to select one or more groups, and then select OK. The selected group displays in the To field.

c. Individual

In Contacts, use the search box to select one or more recipients.

7. Enter the subject for the message being sent.

8. Select Attach, choose a file, and select Upload. Select OK when the file finishes uploading. Repeat to upload more files.

The uploaded files display next to Attachments. Select X next to a file to remove it.

9. Enter your text message in the text box.

The message editor includes some basic formatting options for the content in the message.

The editor also includes a range of merge fields to assist with personalisation of the message, such as date, student details (pertaining to absence details) and templates (if you have created them).

10. Select Send.

To send an SMS

SMS message length

> **Tips:**
> *1. If an SMS message exceeds 160 characters, it gets broken up into 153 character parts. Each 153 character part gets counted as a new SMS message – up to a maximum of 1071 characters.*
>
> *2. SMS message length count is an approximation. Merge fields may cause the length to vary.*
>
> *3. Excluding merge fields, messages only support alphanumeric characters and ! @ # $ % & * ( ) - _ = + ? < > , ' " ; : / .*
>
> *4. (**ST version**) Use the Subject field to help categorise SMS messages in Outbound Message view.*
>
> *5. Add your school name to all messages. This identifies your school as the sender, which is important because the message carrier number is not unique to your school. Your school can purchase dedicated numbers for an ongoing fee.*

1. Select the Sentral menu icon (⋮⋮⋮) and then under Communication, select Messaging.

The Messaging home screen displays.

2. Do one of the following:
   a. Select Send Messages in the left menu and choose Send SMS and Email.
   b. Select Action and choose Compose.

The Message screen displays.

3. Select SMS as the message type.

4. Add one or more contacts in the **To** field. Select ⊕ (Plus sign) and choose from:

a. Cohorts

In Cohorts, select the cohort type and other details for cohort, and then select OK. The selected cohort displays in the To field.

> **Tip:** *The Cohorts option allows you to address messages to large groups of contacts without the need to manually select each contact individually. It excludes contacts that are grayed out and in italics. They won't be messaged due to the selected contact method being disabled.*

b. Groups

In Contact Groups, use the checkboxes to select one or more groups, and then select OK. The selected group displays in the To field.

c. Individual

In Contacts, use the search box to select one or more recipients.

5. Enter your text message in the text box – keeping in mind the SME message length character count.

The message editor includes some basic formatting options for the content in the message.

The editor also includes a range of merge fields to assist with personalisation of the message, such as date, student details (pertaining to absence details) and templates (if you have created them).

6. Select Send.

To send absence notifications

Typically, you'll have the permissions to perform this task in the Messaging module if you have a front office role at your school. Once the rolls have been marked and all variations entered in Sentral, follow these steps send an SMS to parents/carers of students who are absent.

> **Video:** *Watch this demo on our YouTube channel.*
>
> *[Messaging | How to send absence notifications](#)*

1. Select the Sentral menu icon (⣿) and then under Communication, select Messaging.

The Messaging home screen displays.

2. Do one of the following:
   a. Select Send Messages in the left menu and choose Send Absence Notifications.
   b. Select Action and choose Absence Notifications.

   The Absence Notifications screen displays.

3. Select options to filter the absence types included in search results.
   a. Find Absences of Type

   Either use the default 'Whole Day' or select an option from the list.

   b. Absence Reason Types

   Either use the default 'Unexplained (all codes)' or select an option from the list.

   c. For

   Either use the default 'Current' or select an option from the list. This refers to whether the concern is current or current and past.

   d. From:

   Either use the default 'Today' or select an option from the list.

   e. Students that have absences in the following cohorts

   Either use the default 'Whole School' or select a cohort within Campuses, Roll Class or Year.

4. Select Search.

   The Absences notification summary lists information that matches your filter criteria. This includes:

   — Numbers per category – Email, SMS and Publish to Parent Portal Feed

   — Notifications that will fail to send because there is no contact information in the system

   — Estimated cost of the SMS

     The cost is noted but not accurate as it is dependent on the length of the absences SMS notification. The length of an SMS needs to be less than 160 characters. An SMS costs 10 cents per recipient if it matches character length. If it goes over, it costs 20 cents.

     SMS absence notifications get sent out as separate messages to parents if the student has multiple absences on different dates.

5. Decide whether to send notifications as an SMS, email or push them to the Portal.

   Note: *A student can appear in multiple lists. This is because it depends on your school's Messaging Setup configuration choices – whether to use all three methods, but also if a parent has more than one communication method available.*

   Examples

   John Smith (parent) has a valid email address and mobile. The school will select only one means by which to communicate with him.

   Dan Citizen (parent) has only a valid email address and no mobile, so he can only receive absence notifications via email.

6. For each communication method, either deselect checkboxes next to individual students, or deselect all students.

   Note: *You can add/remove the nominated contact per student. Click on the* ⊕ *to view other contact options to add. To remove a contact, click the Remove icon (✖).*

7. For each communication method, select a notification template to use.

   The default choices are a message for whole absences and a message for partial, however you may be able to select other templates configured by the Sentral Administrator at your school.

8. Do any of the following to send the absence notifications:

   a. Select Send All in the Absence notifications summary section.

   b. Select Send All in the SMS notifications section.

   c. Select Publish to Port Feed in the Publish to Parent Portal Feed section.

Work with messages

Overview

If you have a front office administration role at your school, you need to monitor and manage outbound messages and those you receive in relation to SMS notifications.

Every reply to a message sent out via Messaging (by default) is called a 'Direct Message'. If the parent/carer/student replies within the parameters (hours/days) as set in SMS Settings, the reply is called a Response. These responses are stored in 'Outbound Messages'.

   Note: *Received emails are sent to a nominated email account. They do not appear here as a response. Portal replies go straight to Attendance | Responses.*

To view outbound messages

Use the information in this section to check the outbound messages that have been sent and responses to those messages.

> **Video:** *Watch this demo on our YouTube channel.*
>
> *Messaging | How to find outbound messages*

1. Select the Sentral menu icon (⋮⋮⋮) and then under Communication, select Messaging.

   The Messaging home screen displays.

2. Do one of the following:

   a. Select Outbound Messages in the left menu and choose View Messages.

   b. Select Action and choose View Recent Messages.

   The Outbound Messages screen displays a list of all messages sent from the system – including any attachments sent.

3. In the Filter section, select options to optimise your search results.

   a. Message type – select an option to search for specific kind of messages.

   b. Sender is – start typing a name and select from the options displayed.

   c. Application – select a Sentral module.

   d. Date Start and Date End – enter a date range for the search.

   Select Search.

4. View search results.

   — Responses to a message are marked with a green R icon (**R**).

   A Response is a reply to a message sent from school.

   — Messages that are a direct message – not in response to one of your absence messages are marked with a red D icon (**D**).

   A Direct Message is also a reply to a designated number to the school via text. A Direct Message is one that is not related to a specific 'source message' and therefore is not a reply (but a new message).

5. To view details of a sent message, select a link in the Recipients column.

   The View Content pop-up displays message details and the list of recipients.

6. To view possible replies for a message, select the Responses link under the message number link in the Received column.

Example showing an outbound message list with number of responses shown

Example showing a message response with status buttons that can be applied

7. View the status (**R** **D**) of each response and do the following:

a. Select an option under 'Link the response to one of the following outgoing messages'.

b. Either leave the status unchanged or change the response using the Response and Set as Direct Message buttons. Select Save.

Absences Reponses display in the Attendance Module | Responses, which is where you can then update responses from Unexplained to Explained by.

Selecting Set as Direct Message moves the message to your school's Received Messages | Inbox.

8. To view attachments to any emails, select Past Messages tab. To download the attachment, select the attachment link.

To view received messages

Use these steps to check the inbox for direct messages.

1. Select the Sentral menu icon (⋮⋮⋮) and then under Communication, select Messaging.
   The Messaging home screen displays.

2. Select Received Messages in the left menu and choose Inbox.
   The inbox for direct messages displays.

3. Select a message to view its details.

4. Use checkboxes to select messages and move them to folders.
   These messages then appear in Archived or one of the folders created by your school.

To view archived messages

1. Select the Sentral menu icon (⋮⋮⋮) and then under Communication, select Messaging.
   The Messaging home screen displays.

2. Select Received Messages in the left menu and choose Archived.
   Messages moved to the Archived folder of the inbox display.

3. Select a message to view its details.

Work with the address book

Overview

The Messaging address book draws its data from your school's administration management system - so relies on it for accurate data.

Contacts are also populated via your administration system or from Sentral Enrolments.

The list that you see is alphabetic but can be filtered by surname for more granular filter options if you need to do a search.

To view contact details

1. Select the Sentral menu icon (⋮⋮⋮) and then under Communication, select Messaging.
   The Messaging home screen displays.

2. Do one of the following:
   a. Select Address Book in the left menu and choose Contacts.
   b. Select Action and choose View Contacts.
   The Contacts screen displays contacts listed in alphabetical order.

3. Do one of the following to view a contact:
   a. Browse contacts using the alphabet tabs above the listed contacts.
   b. Browse contacts using the Previous and Next arrows.

c. Under Filter:

   i. Select whether to filter by All, students, families, staff, or user added.

   ii. Enter a contact name to search/

   iii. Select a checkbox to display additional filters:

   Missing contact filter

   A useful way to find students with incomplete contact data for follow up and correction. Once selected you can filter further by email, mobile or both.

   Invalid contacts filter

   Contacts with incorrect mobile, email or both.

   Show overridden contacts

   Displays contacts where a change has been made in this module that differs to the data layer source.

d. Select Filter.

4. Use the Legend to understand the symbols beside students and contacts.

> **Note:** *There are some differences in the user interface depending on your school's version of Sentral. If your school has the ST version of Sentral, you'll see Non-Residential Family Contacts listed under Legend. The ST version has an additional column called Family, followed by the Name column (with icon).*

To view contact details for a student

Modern families can be complicated and not all family relationships are adequately explained in all school administration systems.

Feature availability

	Sentral Cloud (ST)	Sentral Enterprise (MT)
Contact Details View **Assign Family field** **Contact Type field**	■ Additional fields	
Student Flags	■	
Available Contacts – Preference field	■	

1. See To view contact details

2. Select the student.
   Refer to the legend to confirm the symbol use for students.

3. (ST version) View student flags.

4. View the Roll Class First Name and Last Name.
   You cannot change this information.

5. (ST version) View the selection under Assign Family. Select a different option if appropriate.

6. (ST version) View the selection under Contact Type. Select a different option if appropriate.

7. (ST version) Under Available Contacts, view the select for Preference. Either leave System Default (Settings) unchanged or select Custom. The default displays the preferred contact order your Sentral Administrator configured in Messaging Setup.
   You will not be able to change the Title, First or Last Name, however you can edit the email address and mobile number. Click Save when done.

8. View details for the listed available contacts.
   This section displays the primary contacts to receive communication as well as those Not to Contact.

9. Under Contact Details:

    a. View email and mobile details if required.

    b. Specify whether to allow the contact method to be used.

    Follow your school's preference to select the best communication method between email and mobile or both. If you update an email or mobile, a red asterisk displays to indicate that it differs from Sentral data.

10. Select Save.

To view contact details

Feature availability

	Sentral Classic (ST)	Sentral Enterprise (MT)
Contact Details View **Assign Family field** **Contact Type field**	■ Additional fields	

1. See <u>To view contact details</u>

2. Select the contact.
    Refer to the legend to confirm the symbol used for different type of contacts.

3. View the Title, First Name, and Last Name.
    You cannot change this information.

4. (ST version) View the selection under Assign Family. Select a different option if appropriate.

5. (ST version) View the selection under Contact Type. Select a different option if appropriate.

6. Under Contact Details:

    a. View email and mobile details if required.

    b. Specify whether to allow the contact method to be used.

    Follow your school's preference to select the best communication method between email and mobile or both. If you update an email or mobile, a red asterisk displays to indicate that it differs from Sentral data.

7. Select Save.

To delete a contact

1. See <u>To view contact details</u>

2. Select the contact.
    Refer to the legend to confirm the symbol used for different type of contacts.

3. Select Delete.

4. Select OK to confirm that you want to remove the contact.

To add a contact to the address book

> ▶ **Video:** *Watch this demo on our YouTube channel.*
>
> *Messaging | Managing Address Book Contact*

1. Select the Sentral menu icon (⦂⦂⦂) and then under Communication, select Messaging.
    The Messaging home screen displays.

2. Do one of the following:

    a.   Select Address Book in the left menu and choose Contacts.

    b.   Select Action and choose New Contact.

    The Contacts screen displays.

3.   Select Add Contact.

    The Contact Details View screen displays.

4.   Specify the Title, First Name, and Last Name.

5.   (ST version) Select an option for Assign Family.

6.   (ST version) Select the Contact Type. Select a different option if appropriate.

7.   Under Contact Details:

    a.   Enter email and mobile details.

    b.   Specify whether to allow the contact method to be used.

       Follow your school's preference to select the best communication method between email and mobile or both.

8.   Select Save.

To manage groups in the address book

Your school might want to create Messaging Groups related to cohorts, activities, parent meetings, etc.

> **Tip:** *You should revise groups each year as students, cohorts and households transition.*

To add a cohort group

1.   Select the Sentral menu icon (⋮⋮⋮) and then under Communication, select Messaging.

    The Messaging home screen displays.

2.   Select Address Book in the left menu and choose Groups.

3.   Under Groups in the right pane, select Add Group.

4.   Enter a name for the group and select Save.

    This creates the group. You still need to add members and cohorts

> **Video:** *Watch this demo on our YouTube channel.*
>
> *Messaging | Address book groups - creating and managing*

To add members and cohorts to groups

1.   Select the Sentral menu icon (⋮⋮⋮) and then under Communication, select Messaging.

    The Messaging home screen displays.

2.   Select Address Book in the left menu and choose Group.

    The Members screen displays the first group list under Groups in the right pane. Members of that group are listed.

3.   Do any of the following:

    a.   Under Members, select View next to a group member to view their details.

b. Under Members, select Unassign next to a group member to unassign them from the group. Select OK to confirm.

c. Under Cohort, select View next to a cohort to view cohort members.

d. Under Cohort, select Unassign next to a cohort to unassign the cohort. Select OK.

e. Select Add and choose Member. Select or search for members to add to the group. Select OK.

f. Select Add and choose Cohort. Select Cohort options to define cohort membership. Select OK.

Manage templates

Overview

Use the information in this section to create school-based SMS and email templates.

> **Video:** *Watch this demo on our YouTube channel.*
>
> *[Messaging | Create and manage messaging templates](#)*

To view available templates

1. Select the Sentral menu icon (⋮⋮⋮) and then under Communication, select Messaging.
   The Messaging home screen displays.

2. Select Templates in the left menu and choose Manage Templates.
   The templates screen displays.

3. Under Groups, view the list of existing template groups.
   Sentral supplies four default templates in the group called Absence Notices.
   — Partial Absences (Email)
   — Partial Absences (SMS)
   — Whole Absences (Email)
   — Whole Absences (SMS).

4. Select a group to view the list of templates in that group.

5. Select Edit next to a template to view its content.

To add a template group

6. Select the Sentral menu icon (⋮⋮⋮) and then under Communication, select Messaging.
   The Messaging home screen displays.

7. Select Templates in the left menu and choose Manage Templates.
   The templates screen displays.

8. Under Groups, select Add Group.

9. Enter a name for the group and select Save.
   The new group is added to the list of groups.

To add a template

1. Select the Sentral menu icon (⋮⋮⋮) and then under Communication, select Messaging.
   The Messaging home screen displays.

2. Select Templates in the left menu and choose Manage Templates.

The templates screen displays templates for the Absence Notices group.

3. Select Add Template.
4. In Add Template:
   a. Enter a template name.
   b. Select the type – Email, SMS, or Letter.
   c. Select a group from the list.
   d. Specify the notification type.
   e. Select the notification type.
   f. Under Body, enter the template content. Use Recipient or Student fields to insert merge fields that personalise the message.

> **Tip:** *When you add or edit an SMS template, replace the SCHOOL NAME default with the actual name of your school. Replace the hash symbols ### with your school number.*

5. Select Save.

To edit a template

1. Select the Sentral menu icon (⠿) and then under Communication, select Messaging.
   The Messaging home screen displays.
2. Select Templates in the left menu and choose Manage Templates.
   The templates screen displays templates for the Absence Notices group.
3. Select a template group.
4. Select Edit next to the template.
5. In Edit Template, update any of the following fields:
   a. Template name
   b. Template Type
   c. Group.
   d. Notification Template Type
   e. Under Body, Update the template content. Use Recipient or Student fields to insert merge fields that personalise the message.

> **Tip:** *When you add or edit an SMS template, replace the SCHOOL NAME default with the actual name of your school. Replace the hash symbols ### with your school number.*

6. Select Save.

To delete a template

1. Select the Sentral menu icon (⠿) and then under Communication, select Messaging.
   The Messaging home screen displays.
2. Select Templates in the left menu and choose Manage Templates.
   The templates screen displays templates for the Absence Notices group.
3. Select a template group.
4. Select Delete next to the template.
5. Select OK to confirm.

Work with Reports

To view contacts with no information

> **Video:** *Watch this demo on our YouTube channel.*
>
> *Messaging | Reports - no contact information*

1. Select the Sentral menu icon (⠿) and then under Communication, select Messaging.
   The Messaging home screen displays.
2. Select Reports in the left menu and choose No Contact Information.
   Students with no contact information are listed.
3. Review the data coming from your school's administration system or the Enrolments module. Update as required.

SMS top-up

Overview

Use the information in this section to top up your school's SMS balance.

There are several ways to top up your school's SMS balance:
- By selecting Top-up balance on the Messaging home screen or within Messaging Setup
- By accessing the Help Centre when you're in the Messaging module.

> **Video:** *Watch this demo on our YouTube channel.*
>
> *Messaging | SMS Top-Up*

How to top up your SMS account balance

4. Select the Sentral menu icon (⠿) and then under Communication, select Messaging.
   The Messaging home screen displays.
5. View the account balance display at the top left of the screen.
6. Do one of the following:
   f. In the left pane, select Top-up balance.
   g. On the top menu bar, select Help Centre (⑦ Help Centre).
   The Sentral Help Centre pane displays.
7. Under Messaging, select SMS Credit Top-Up.
8. Under Log a Sentral Service Case:
9. Select the option 'SMS Credit Top-Up: I want to add more credit to my SMS account', and select Next.
10. View the information about timing and invoicing, and select Next.
11. Enter the top-up amount in multiples of $50, and select Lodge My Case.
    The credit will be applied within 24 hours – providing there are no outstanding invoices for SMS credit top-ups.