# Finalsite Messages Training Guide
## February 24, 2020

**Login here:** https://www.greateratlantachristian.org/admin.cfm
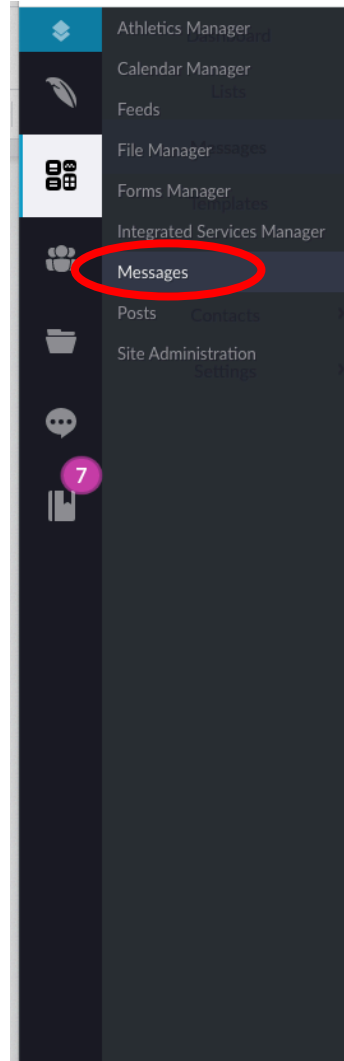(if you have trouble logging in, contact the Communications Office)

**To get started, click Composer in top right.**

greateratlantachristian.org/admin.cfm?do=welcome

Apps   Finalsite Website   My Basecamp   SunTrust   WebPortal   MS Schedule   HS Schedule   Mavenlink   Linktree   NetCommunity   S Menu   Jotform Project   Jotform News   19-20 Families

Finalsite

Composer   Modules & Settings   Support   Shop

my account: **erestea** | Change your Password | ☑ show dashboard at login
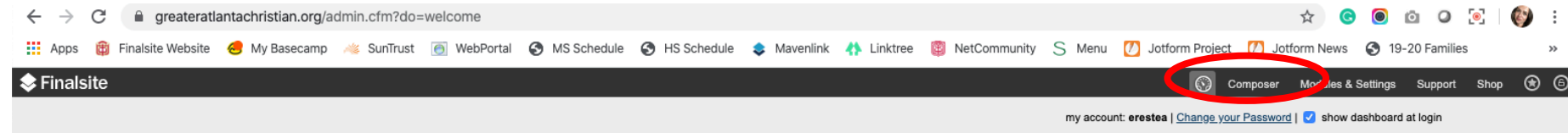
You will work here for developing your messages.

Athletics Manager
Calendar Manager
Feeds
File Manager
Forms Manager
Integrated Services Manager
Messages
Posts
Site Administration

You will work here for setting up your email distribution lists or groups.

Admin Users
Constituent Manager
Group Manager
Messages
Templates
Dynamic Content
Contacts
Settings

7
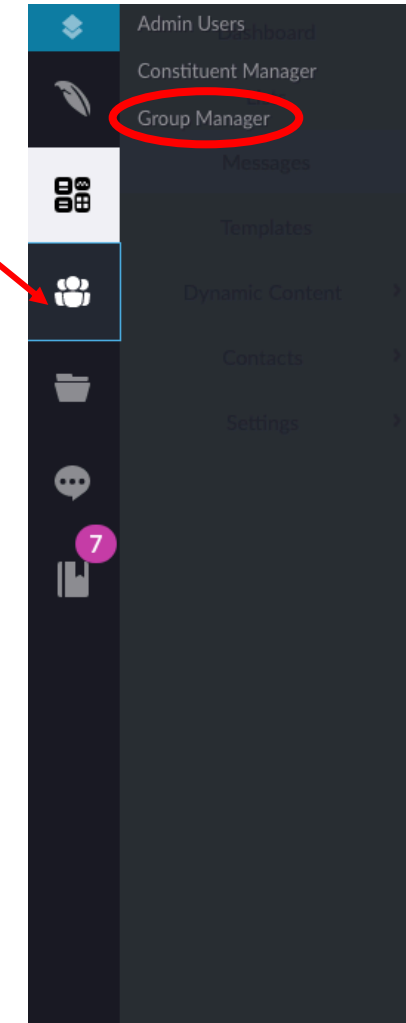
**Things to keep in mind:**
- As you are working, continue to click Save (or Update, depending on which is showing) in bottom right, especially after working on something for a while.
- Creating your message and preparing your email list are two separate processes that are accomplished in different parts of the platform. Both are explained in detail. I recommend taking care of your list first so that when you have to prepare your email for sending, it's ready to go.
- **Always send a test email before sending out a real one.**
- Remember, 50% of users open messages on mobile rather than desktop so you need to check your test emails on mobile to make sure they look good.

Dashboard

Lists

Messages

Templates

Dynamic Content ›

Contacts ›

Settings ›

# Capital Campaign Update 1 ✏️

Marketing  Operational    **Send To** Please select a list ▾

## Email Subscriber Notification

**Subject** | Campus Update

Add Personalization ⓘ   First Name   Last Name        Characters: 13



**From Label** [ ]

**Reply-To** ⓘ  Please select an address ▾

✏️ ⊙ ▤

*Internal Use Only*

**Notes** | Internal Notes

**Tags** [ ]

Mobile Subscribe

**Title** (optional) [ ]

**Body** [ ]

Plain te

**Action** (on tap) ⬤

**Note:** If you need to get back to a message from whatever screen you are on, click messages in the left navigation, then click the pencil underneath the email.
Remember, no there is no autosave so save in bottom right bar before moving to another screen.

2. You must fill out each field in order to be able to click Next. These can always be changed once you are in the message and before delivery. I recommend having an internal name with good keywords because you have the option to search for messages in case you ever need to go back in history to find an old email to repurpose (for reference: the search bar is in top right under the green button). Select one of the approved templates. If you need changes to a template or need one created, please contact the Communications Office.

3. Click on a block for the editing options gray bar to appear at the top. You will also see two buttons in the bottom right of the text block. One is the delete button, another is the duplicate button. Clicking duplicate will just add the block right under the block you are working on.  For readability, I recommend a 14 px for font size, making headers bold and red (the red closest to the template) so they stand out. I recommend sticking with the Arial font and being consistent with sizes throughout except for headers if you need those bigger.

Delete the dummy text in the template and paste your own copy to the text block (or type in). Or if what you need is not already in the template, click Content tab on the right, then drag and drop whatever element you need (image for example) to where you want it to go in the email (above or below a content block for example). Once you drag and hover over a space, a blue line with the words "Drag it Here" will appear if that is a place you can insert.

**Note:** When you copy and paste text that has a hyperlink, you lose the hyperlink unfortunately and have to add them back in. So definitely finalize your text **before** adding in hyperlinks, especially if you think you will need to move paragraphs around. If you copy/paste text from a word or Google doc, you will also lose the hyperlinks. I recommend if you are working in a document, paste the full hyperlink address next to the text that needs to be hyperlinked and leave there until the end when you add in all your hyperlinked text at the very end.

**Add images:** Adding horizontal images between text blocks can be achieved by dragging the image content block to the space you want. However if you want an image to the right/left of some text, you do not embed in the text block. You have to go to the Rows tab and select the right kind of row. Drag that row to where you want it to go. Then you go to the Content tab and drag the image block to the smaller block. Then click the browse button to add in your image. Add in the text block to the box on the left of the image.

4. Once you've dragged your images block, click on the browse button and the screen below will appear. Click Upload , then Public, then you'll see a new screen. Scroll all the way to the bottom until you get to GAC Resources folder. Click that folder and upload there by clicking on the blue upload button which is now solid and means you can use it (before it was a light shade, a sign that it was not accessible). Once you've uploaded, click the blue insert button on the image you need to insert.
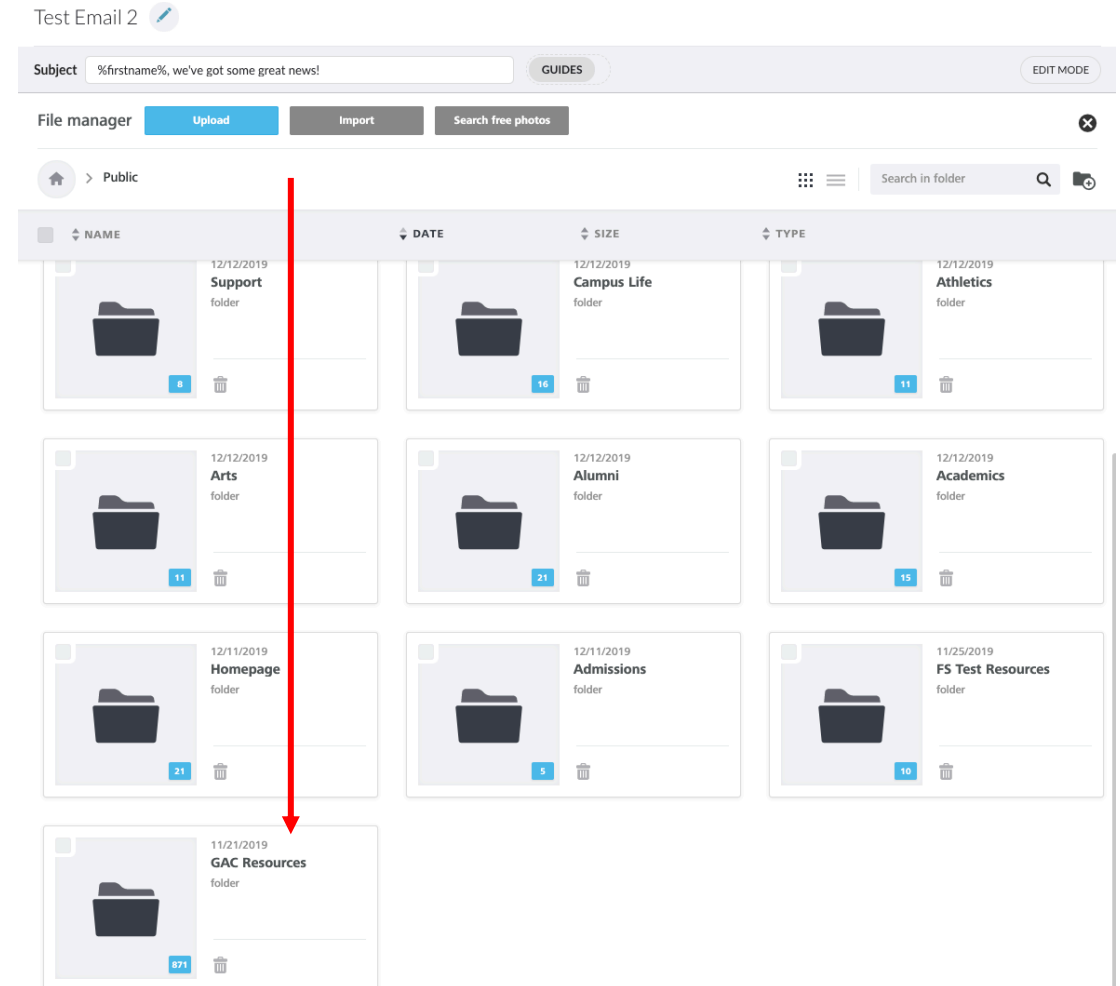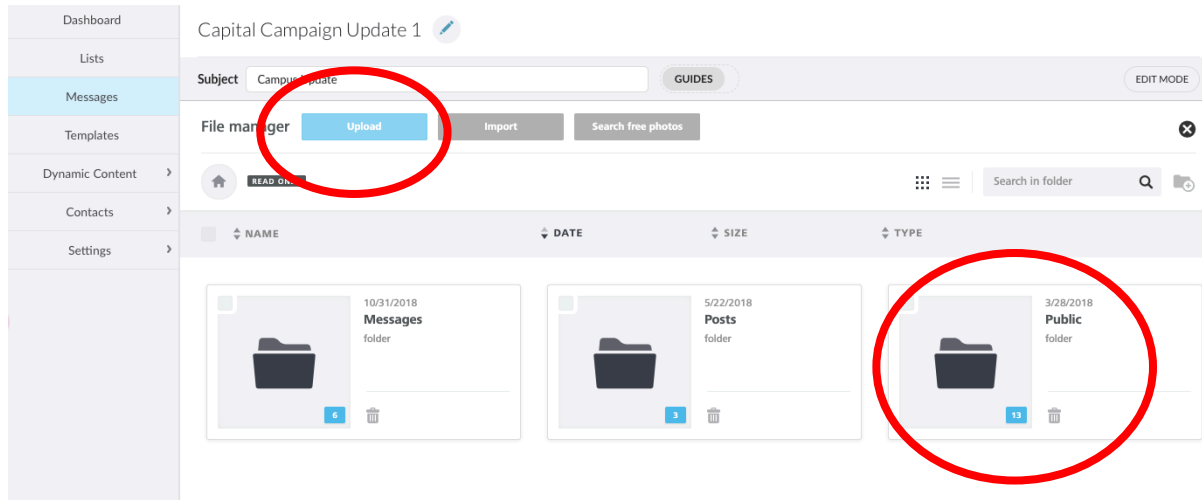
**Adding images/files as links:** When you want to share an image or file, but you don't necessarily want it in the email, you can upload the image like you usually do but hyperlink it as a resource to the text in the body of the email. When you hyperlink the text, from the dropdown you can select File Manager under Link Type. From there you will be taken to the upload screen as before. If you have already been uploading images to the email, Finalsite remembers that and takes you straight to the GAC Resources folder where you have to upload. Upload your image, click to insert, then click Ok on the black screen. If you need to change the hyperlinked text, you'll see that as an option on the black screen ("text to display"). If you need to get back to the black screen, click on the hyperlinked text, then the hyperlink button and you will be able to.

**Note:** even though when you first got to the black screen you selected File Manager to set up your hyperlinked image, Finalsite changes that to URL because now the image is housed on the website with its own unique URL that anyone can get to if they have that URL. You can share that link with anyone to see the image/or doc file for that matter. It now has its own link.

Capital Campaign Update 1

Subject: Campus Update

GUIDES

EDIT MODE

CONTENT | ROWS | SETTINGS

CONTENT PROPERTIES

Unlocked

Text color  #555555

Link color  #0068A5

not used often. The aging pine trees between the Student Family Center and the Village needed to be removed for the safety of our young students, which we did last week.

As we considered these needs, we started to reimagine the space: how could we improve this area and make it even more useful for our students and families? We began to dream of open green spaces designed as a park, with room for play, learning, inspiration, special events, and for the enjoyment of our entire GAC community.

We recognized an opportunity to create a connection between Strickland Plaza, Smith Plaza, Center Stage, and the Cross Tower, thus improving the experience, beauty and movement between these spaces. In addition, students in High School and Middle School will benefit from safer passage between their buildings and the Sara D. Williams Fine Arts Center with the installation of an elevated crosswalk at the front of the park.

**Insert link**

| | |
|---|---|
| Link Type | URL |
| Url | https://resources.finalsite.net/images/f_auto,q |
| Underline Link | ✔ |
| Text to display | new playground area |
| Title | |
| Target | New window |
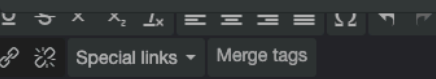
Ok  Cancel

Early Childhood Village

Combee Elementary Complex

Arial  14px  **B** *I*  Special links  Merge tags

Students in the Village will benefit from the changes we are proposing for their space as well. Some of the sweetest sounds heard on campus are those of the Village students playing outside throughout the school day. A new playground area will be designed that is just right for our young students' imaginations and play.

Click Here

Follow Us On Social

**Other things you can do:**

- You might not like how the line spacing looks on the page. You have the option to change that with "line height in the right column when you're in the content tab.

- Use the "move" tool at the right side of a content block to move the block up and down in the email.

---

Test Email ✏️

Subject | Test Email | | GUIDES

EDIT MODE

**GAC Advancement**

**With regular line height:**
GAC designs and engages rigorous, intentional academic experiences that keep in mind the distinct purpose of each student. Research and care inform every decision, from classroom layout to daily schedules and technology resources.

In the GAC Lower School, our youngest Spartans gain a firm grounding in the academics, faith, and community that will carry them through their educational career. They discover their interests, talents, and the joy of learning through experiences inside the classroom, STEAM labs, and across the campus.

**With adjusted line height:**
GAC designs and engages rigorous, intentional academic experiences that keep in mind the distinct purpose of each student. Research and care inform every decision, from classroom layout to daily schedules and technology resources.

In the GAC Lower School, our youngest Spartans gain a firm grounding in the academics, faith, and community that will carry them through their educational career. They discover their interests, talents, and the joy of learning through experiences inside the classroom, STEAM labs, and across the campus.

Content

**Follow Us On Social**

f  📷  🐦  v  in

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www.greateratlantachristian.org
Unsubscribe Link

---

📇 CONTENT | ▦ ROWS | 🗐 SETTINGS

CONTENT PROPERTIES  🗑 📋 ⌄

🔓 Unlocked

Text color | ⬛ #555555

Link color | 🟦 #0068A5

Line height | ▬ ▬ ▬ ▬

BLOCK OPTIONS

Padding | More options ⬤

All sides

−  10  +

Hide on | Desktop | Mobile

**Note:** when you send your test email, you'll notice that your image is probably to the edge of your screen, at least on mobile. This is where padding comes into play. You will want to add padding to your images. You do that by clicking on the image then clicking + sign on the right side. 10 px is usually enough padding for things to look good on mobile. Make sure text blocks also have 10 px of padding,

6. Click update at the bottom. Then Message Details. You have to fill in the From and Reply to (if the email address you want for the reply to is not there, see instructions on the following slides). Then you can send a test email. A black screen will appear. Add in all of the email addresses the test should go to. You can add in instructions to the people being sent the test. Click Test Send and you should get the test in less than a minute.

**Things to look for in your test:**
- Check on desktop and mobile to see how it looks.
- Adjust padding on text blocks and images if you haven't already.
- Make sure font sizes are consistent.
- **Very important: check to make sure all links work.**

7. Once you have reviewed the test on desktop and mobile you should see a Schedule Send button in bottom right. If you don't, then you have some missing pieces. Check the bottom left and there is a message "Why can't I send?" which will tell you what the problem is. You should have selected the "Send to" which is your group (if you don't have your group list set up, see the upcoming slides for how to do this). Your From label and reply to also needs to be set. For the reply to instructions, see upcoming slides.
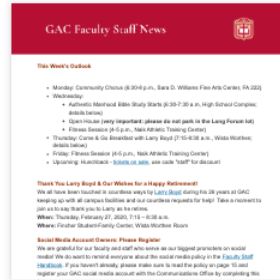
8. When you go to schedule a send, you get this screen where you have the option to send, in addition to the people on the distribution list you selected, to people who might not be on a list (Shane will not be on the High School Parents distribution list) but need to see the final email. That is where you add up to 10 people in.
**Note:** The person creating the email and the person on the Reply-To will get a notification that the email went out.
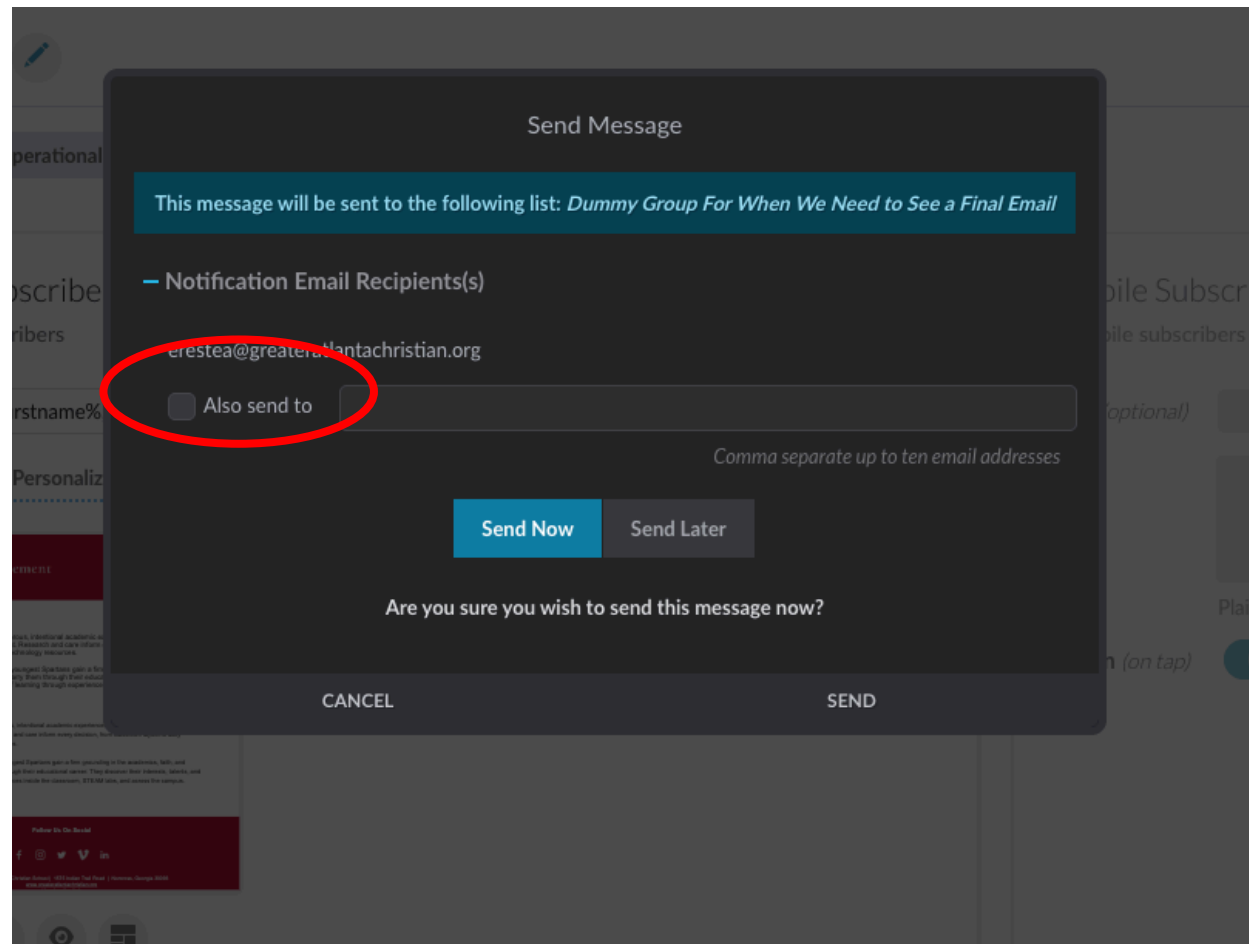
**Note:** if you want to personalize your email (adding in a first name for example), you can do this in the body of the email or in the subject line. This is especially effective when you want to get someone's attention. Personalized emails to better. All you do for the subject line is click First Name under the subject line block then add a space then your text as below. You'll see that some code appears. That gets filled in by the system with the person's name. You won't actually see the name as this is done individually. You will only see it in the final email. You have to trust that the system will get it right.

Dashboard

Lists

Messages

Templates

Dynamic Content >

Contacts >

Settings >
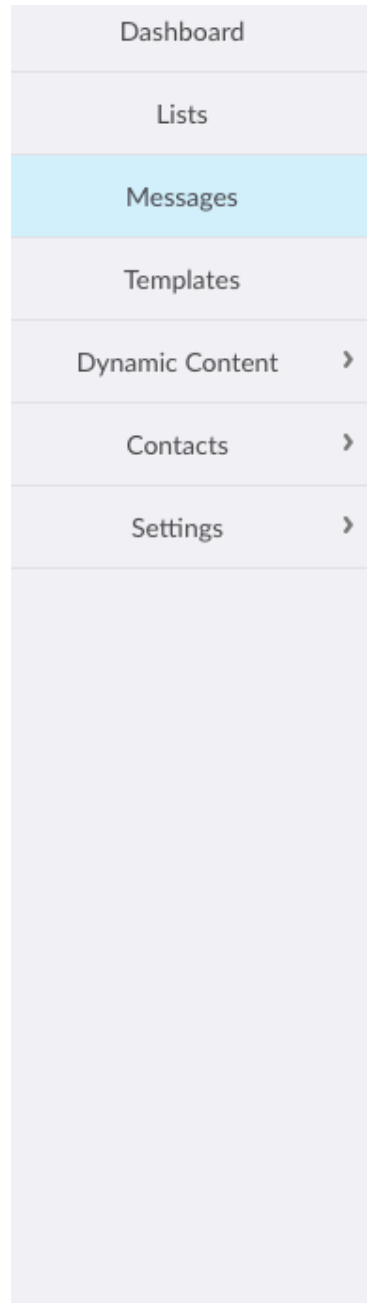
Capital Campaign Update 1 ✎

Marketing | Operational      Send To  All Parents and F/S ▾     Segment  All Subscribers ▾

Email Subscriber Notification
2352 email subscribers

Subject  %firstname% we have an update for you

Add Personalization ⓘ   First Name   Last Name        Characters: 37

Office of the President

Dear %firstname%,

We are happy to have you back from Winter Break and hope that you enjoyed quality time with your family. We're proud of our many students who served on mission teams over the break and we know you're glad to have them home. As you return to campus, you may notice some changes, and I want to share some exciting news.

First, allow me to give you a little background. The parking lot between the High School Complex and the Early Childhood Village has repeat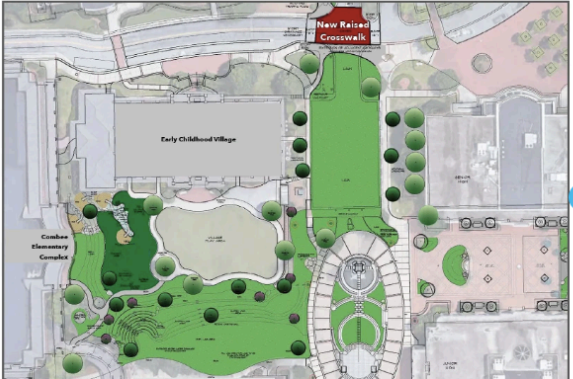edly been patched but now needs to be replaced entirely. The current Village playground equipment is aging and is improperly scaled for our younger students and the green asphalt adjacent to the playground is cracking and is not used often. The aging pine trees between the Student Family Center and the Village needed to be removed for the safety of our young students, which we did last week.

As we considered these needs, we started to reimagine the space: how could we improve this area and make it even more useful for our students and families? We began to dream of open green spaces designed as a park, with room for play, learning, inspiration, special events, and for the enjoyment of our entire GAC community.

We recognized an opportunity to create a connection between Strickland Plaza, Smith Plaza, Center Stage, and the Cross Tower, thus improving the experience, beauty and movement between these spaces. In addition, students in High School and Middle School will benefit from safer passage between their buildings and the Sara D. Williams Fine Arts Center with the installation of an elevated crosswalk at the front of the park.

From Label  Scott Harsh

Reply-To ⓘ  erestea@greateratlantachristian.org ▾

✎  ⊙  ▤

To add personalization to email body, you have to click Merge Tag and select the tag you want to use (nickname or class of for example). You can add a comma in after the code so it looks right. You don't have the option to select the nickname merge tag when you personalize a subject line unfortunately (only first or last name).
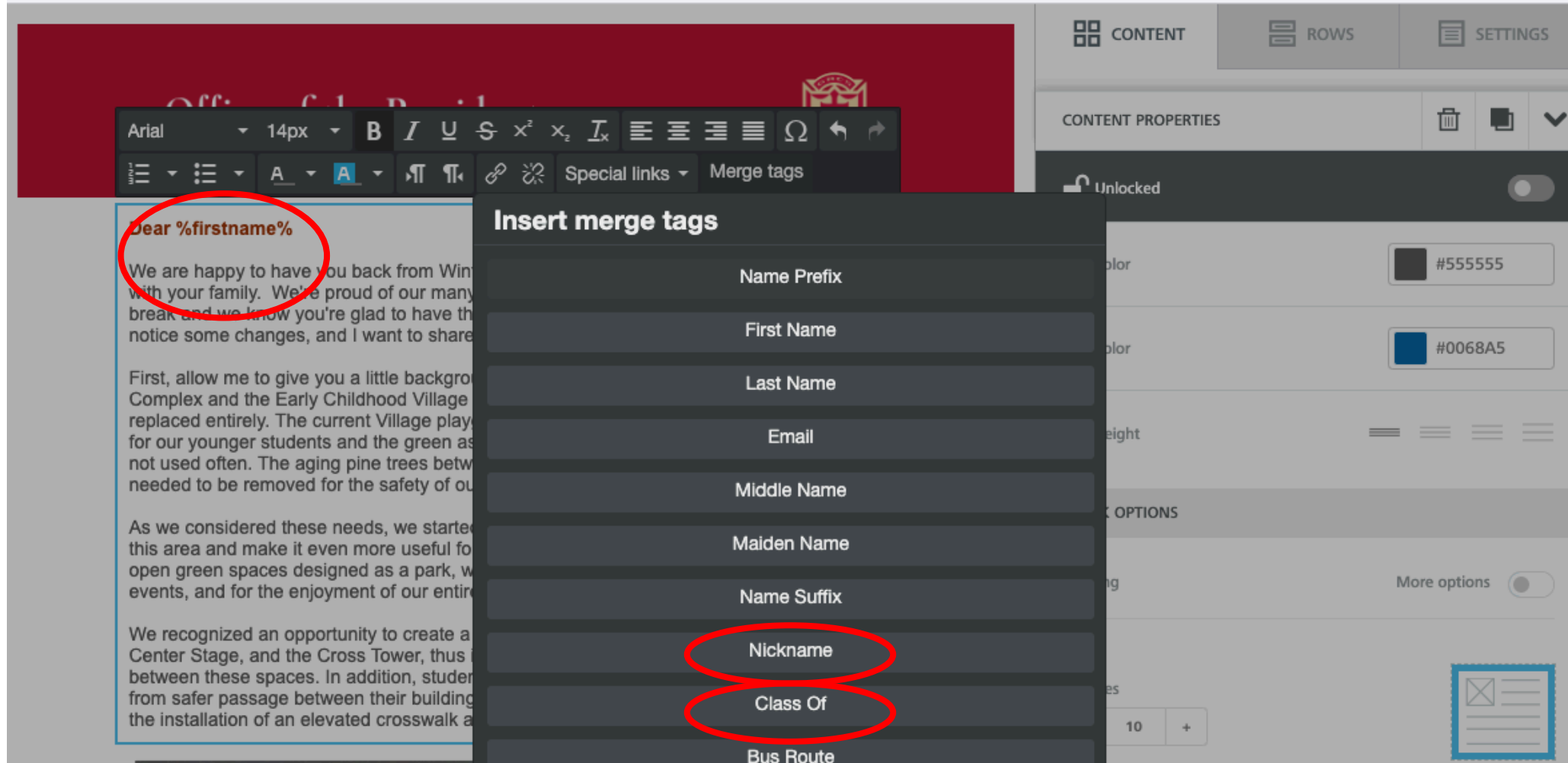


For advancement: Setting up merge tags to include dollar amounts for example. Finalsite needs to set up the merge tag.

You cannot send an email a second time from the same email message. Instead you have to duplicate the message and start over. The duplicate button is to the far right. It will ask you if you want to clone the message.

**Adding reply-to email address:** In order for someone to be able to get the responses for their message, they will need to be sent a verification email and set up in the system. Here are the steps to add:

1. Go to Settings, then Reply-To Addresses
2. Enter the email address in the top right then click the Verify Email green button. Click Send when you are prompted on the black screen.
3. Let the person know they will have to do the following:
   a. You will get an email asking you to verify. Click the Verify Address block and that's it. You will be redirected to a web page but you don't have to do anything there. It looks like it's asking you to log in. Ignore that.
4. If for some reason, someone doesn't respond to the verification, doesn't get the email, etc, you can just delete them then send again.
5. Also, in the dropdown for reply to when you are getting your email ready to send, if the email you just verified doesn't appear there, reselect the group you are emailing to and that will refresh the page and email should appear in dropdown.

Dashboard

Lists

Messages

Templates

Dynamic Content

Contacts

Settings

7

## Reply-To Addresses

Reply-To Addresses

Add New Email Address

+ Verify Email
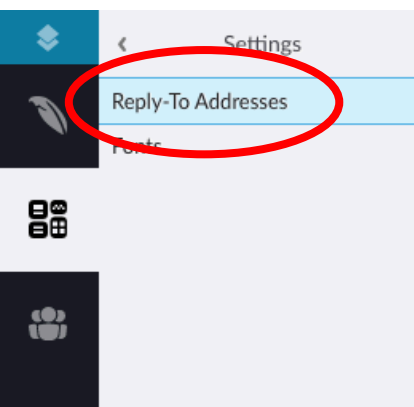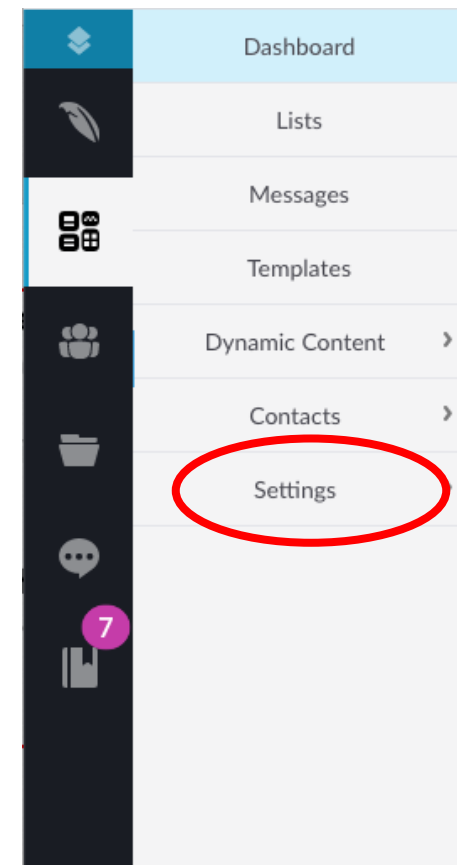
**From Address:** noreply@greateratlantachristianorg.myenotice.com

Configure the reply-to email addresses that admins can select when creating a message. This is the address that message recipients will use when they reply to a message. You can only select email addresses that are on domains you control.

bdowdy@greateratlantachristian.org ................................................ *Pending Verification*  ⚙ 🗑

cedwards@greateratlantachristian.org ................................................................... ⚙ 🗑

**Creating Distribution Lists Using Groups:**
1. Go to Groups. This will open up a popup.
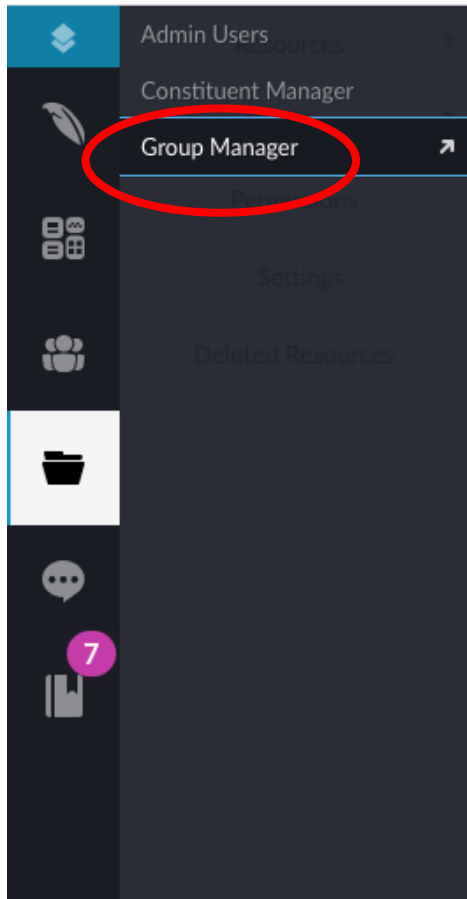
2. Click Add Group then fill out the group name on the right. Click Create Group.

**3. Click add dynamic filter. This means that the list is created once in the system but the contacts will always be pulled and updated dynamically every time you send an email. Then**

**Groups**

| Settings | Group Space | Members | Rights | Picture |

**+ Add Group**

**Search Filters**

All Group Types

● Active groups      ○ Archived groups

🔍

**116 Groups Found**

- Academic Classes
- **+ Departments**
- **+ Locations**
- Alumni Groups
- **Public User Groups**
- **+ Athletics**
- **12th Grade Parents**
- **12th Grade Students**
- **12th Parents & Students**
- **5th Grade Parents**
- **8th Grade Parents**
- **Academics**
- **Admissions**
- **All Parents No F/S Parents**
- **Alumni 2**
- **Arts**
- **Athletics**
- **Campus Life**
- **Dummy Group When I Need to See a Final Email**
- **High School F/S**
- **Impact**
- **Parents & Fac/Staff**
- **Support GAC**

**Parents & Fac/Staff**                                    🗑 Delete

Group Name      [Parents & Fac/Staff]

Group ID        [                    ]

Period          [                    ]

School Year     [                    ]

Location        [                    ]

ImportID        [fs_314              ]

(A new importID will be generated if the importID field is blank)

☐ Enable a Group Space

☐ Allow parents to view student Group Space

☐ Allow admins to customize Group Space Dashboard

☐ Allow admins to change Group Space Theme

☐ Allow admins to override Activity Stream permissions

☐ Show admins in group space member list

☐ Archive this group

Group Placement    (this group is at the top level)
                   Change placement

Filtered Membership    **No active filters**
                       Add dynamic filters

**Icon**

○ ○ ○ ○ ○ ○ ○

Note: Users will not see changes to the icon until the next time they log in

💾 Update Settings
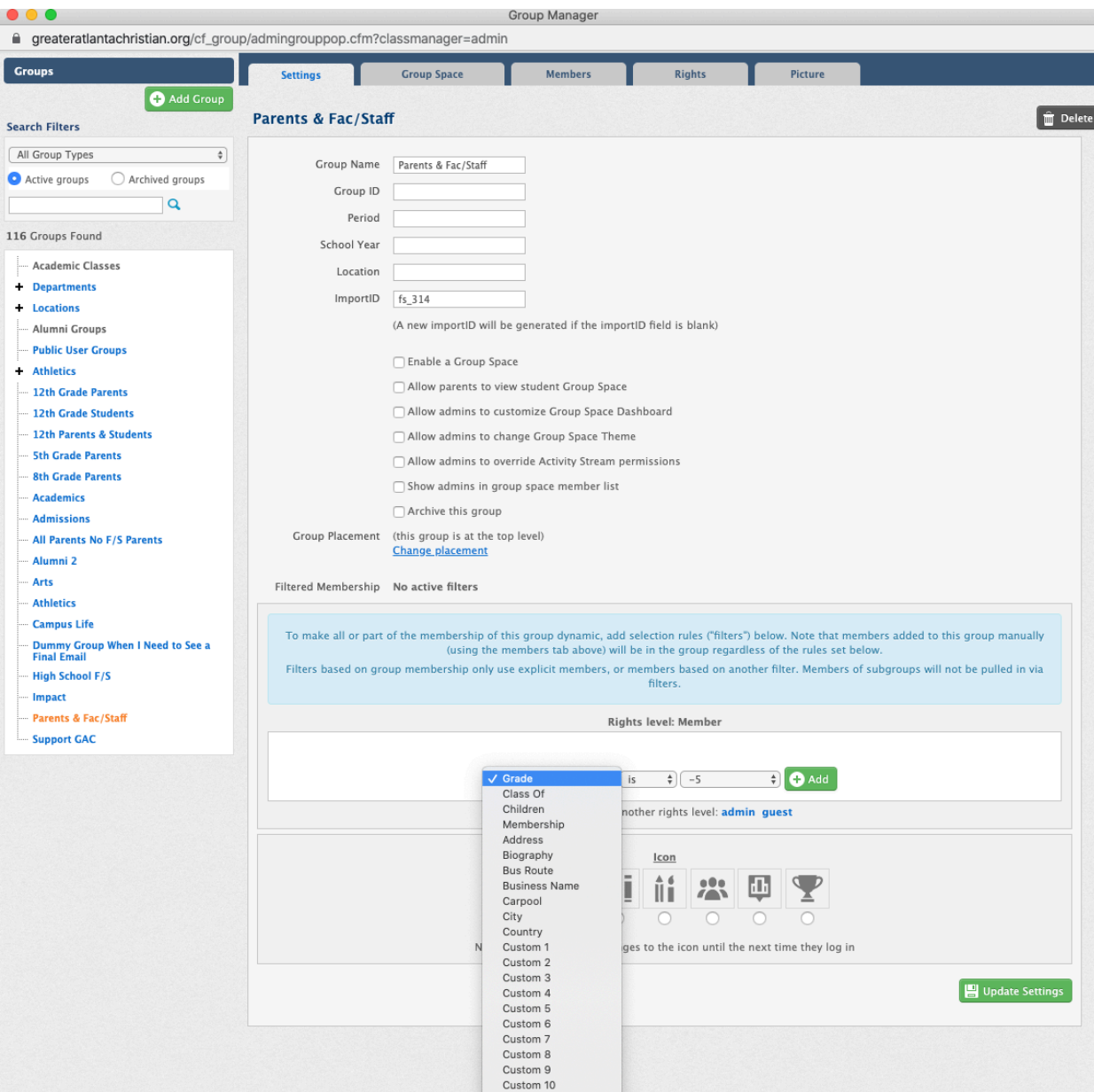
4. You'll see this screen. Now you will have the chance to select the criteria for your list.

**Note:** the Communications Office needs to be the one to send out any email that goes out to Parents for a grade level or more. The school level offices are free to send out emails to students. Some examples to follow for creating lists.

Groups

| Settings | Group Space | Members | Rights | Picture |

**8th Grade Girls**

Group Name: 8th Grade Girls
Group ID:
Period:
School Year:
Location:
ImportID: fs_316

(A new importID will be generated if the importID field is blank)

☐ Enable a Group Space
☐ Allow parents to view student Group Space
☐ Allow admins to customize Group Space Dashboard
☐ Allow admins to change Group Space Theme
☐ Allow admins to override Activity Stream permissions
☐ Show admins in group space member list
☐ Archive this group

Group Placement    (this group is at the top level)
Change placement

Filtered Membership    Active filter(s) listed below

To make all or part of the membership of this group dynamic, add selection rules ("filters") below. Note that members added to this group manually (using the members tab above) will be in the group regardless of the rules set below.

Filters based on group membership only use explicit members, or members based on another filter. Members of subgroups will not be pulled in via filters.

Rights level: Member

◉ All the rules:    ◯ Any of the rules:

Gender *is* Female ✖

AND

Grade *is* 8 ✖

[Grade ▾] [is ▾] [−5 ▾] ➕ Add

Add a filter for another rights level: **admin  guest**

Icon
◯ ◯ ◯ ◯ ◯ ◯ ◯

Note: Users will not see changes to the icon until the next time they log in

💾 Update Settings

**Search Filters**
All Group Types ▾
◉ Active groups    ◯ Archived groups
🔍

118 Groups Found

- Academic Classes
- **+ Departments**
- **+ Locations**
- Alumni Groups
- **Public User Groups**
- **+ Athletics**
- **12th Grade Parents**
- **12th Grade Students**
- **12th Parents & Students**
- **5th Grade Parents**
- **8th Grade Girls**
- **8th Grade Parents**
- **8th Grade Parents & Students**
- **Academics**
- **Admissions**
- **All Parents No F/S Parents**
- **Alumni 2**
- **Arts**
- **Athletics**
- **Campus Life**
- **Dummy Group When I Need to See a Final Email**
- **High School F/S**
- **Impact**
- **Parents & Fac/Staff**
- **Support GAC**

➕ Add Group

**Example: 8ᵗʰ Grade Girls**
Notes:
- I selected criteria for both 8ᵗʰ graders, then filtered by gender and selected that All the rules have to be true
- You have to scroll for a bit to see gender in the dropdown.

**Groups**

Settings　　Group Space　　Members　　Rights　　Picture

Add Group

**Search Filters**

All Group Types

◉ Active groups　○ Archived groups

🔍

**118 Groups Found**

Academic Classes
+ Departments
+ Locations
Alumni Groups
Public User Groups
+ Athletics
12th Grade Parents
12th Grade Students
12th Parents & Students
5th Grade Parents
8th Grade Girls
8th Grade Parents
8th Grade Parents & Students
Academics
Admissions
All Parents No F/S Parents
Alumni 2
Arts
Athletics
Campus Life
Dummy Group When I Need to See a Final Email
High School F/S
Impact
Parents & Fac/Staff
Support GAC

**8th Grade Girls**

60 Members

Select More Members

| Name | | Via | Group Role | Hide Admin | Position | |
|---|---|---|---|---|---|---|
| Allison Aden | ⭐ | Filtered | Member | | | ✉ |
| Anabella Ahmed | ⭐ | Filtered | Member | | | ✉ |
| Catherine Angove | ⭐ | Filtered | Member | | | ✉ |
| Belle Baker | ⭐ | Filtered | Member | | | ✉ |
| Katherine Baker | ⭐ | Filtered | Member | | | ✉ |
| Myla Benton | ⭐ | Filtered | Member | | | ✉ |
| Emily Brown | ⭐ | Filtered | Member | | | ✉ |
| Madison Burrough | ⭐ | Filtered | Member | | | ✉ |
| Ruby Butler | ⭐ | Filtered | Member | | | ✉ |
| Malia Campos | ⭐ | Filtered | Member | | | ✉ |
| Mia Carlton | ⭐ | Filtered | Member | | | ✉ |
| Elizabeth Chase | ⭐ | Filtered | Member | | | ✉ |
| Yulin Chen | ⭐ | Filtered | Member | | | ✉ |
| Natalie Chumley | ⭐ | Filtered | Member | | | ✉ |
| Ashley Clark | ⭐ | Filtered | Member | | | ✉ |
| Emma Craig | ⭐ | Filtered | Member | | | ✉ |
| Emma Denton | ⭐ | Filtered | Member | | | ✉ |
| Tia Dorsey | ⭐ | Filtered | Member | | | ✉ |
| Virginia Ellis | ⭐ | Filtered | Member | | | ✉ |
| Alexandra Fallon | ⭐ | Filtered | Member | | | ✉ |
| Avery Fallon | ⭐ | Filtered | Member | | | ✉ |
| Savannah Futral | ⭐ | Filtered | Member | | | ✉ |
| Emma Glover | ⭐ | Filtered | Member | | | ✉ |
| Kara Guinn | ⭐ | Filtered | Member | | | ✉ |
| Faith Halley | ⭐ | Filtered | Member | | | ✉ |
| Abigail Hamilton | ⭐ | Filtered | Member | | | ✉ |
| Anna Hardy | ⭐ | Filtered | Member | | | ✉ |
| Tristan Hicks | ⭐ | Filtered | Member | | | ✉ |
| Rylie Hill | ⭐ | Filtered | Member | | | ✉ |
| Riley Hinton | ⭐ | Filtered | Member | | | ✉ |
| Reagan Hufham | ⭐ | Filtered | Member | | | ✉ |
| Georgia James | ⭐ | Filtered | Member | | | ✉ |
| Mychaela James | ⭐ | Filtered | Member | | | ✉ |
| Kaydence Killins | ⭐ | Filtered | Member | | | ✉ |

If you want to spot check to make sure your list is correct, go to Members (after you have Updated, otherwise it won't save your changes) and take a look at the list.

5. Once you've created your group, now you go to Lists on the Messages side to pull in the group to the right list. When you get to the lists page, click Create Mailing List. You will then need to name your mailing list. Please put your office name before the detailed list name. Let's use these codes for the beginning of the name as Finalsite sorts the lists in ABC order and that way it will be easier to see all lists created for your office.

YL, LS, ES, MS, HS for school levels; AD for advancement; AL for alumni; CR for Community Relations; SA for student accounts, PO for President's Office. If you didn't put the right code when you first created your list, you can go back. Just click the list name then look for the gears icon in the bottom right and update that way.
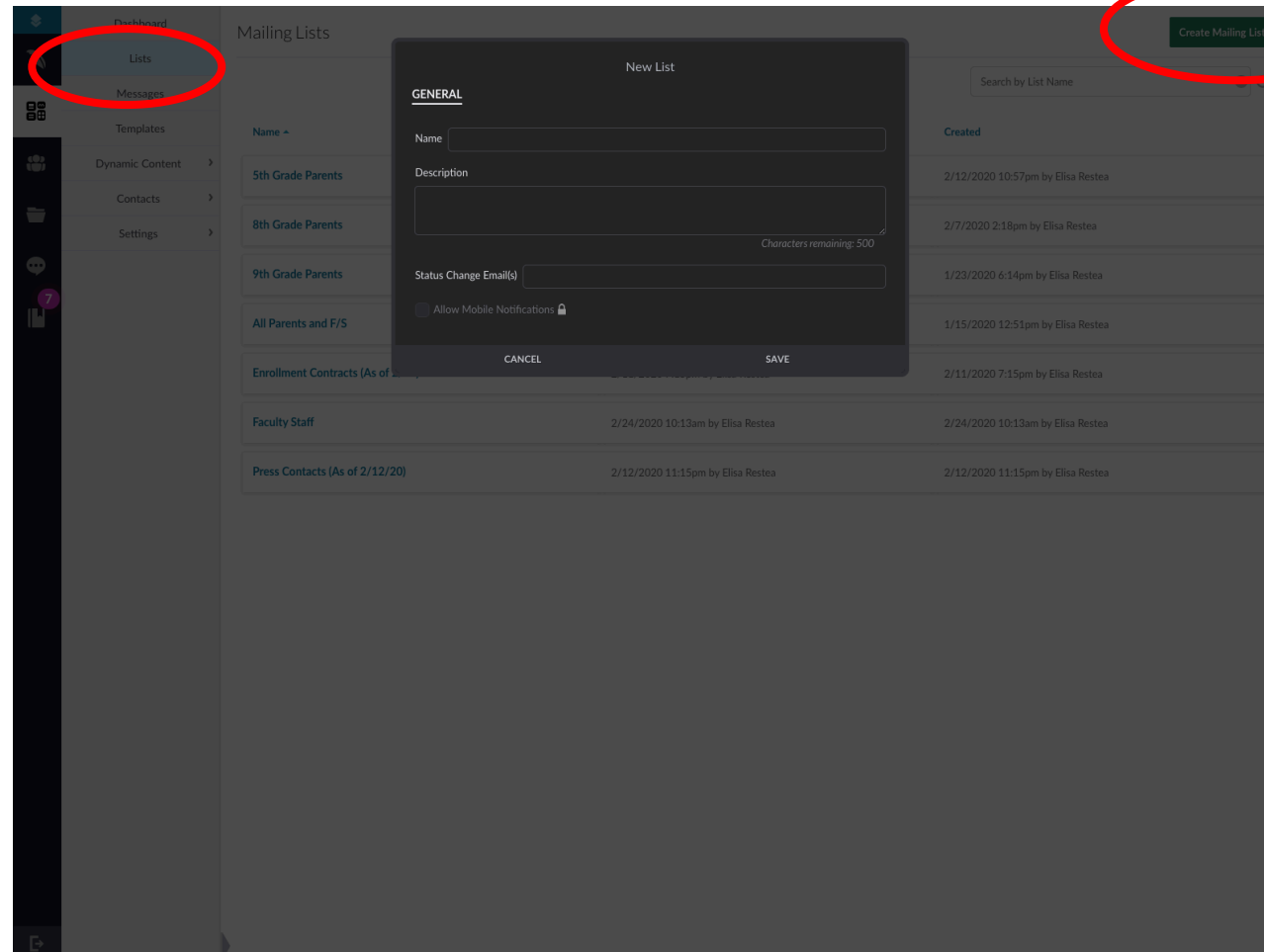
6. Now when you go back to the List, the green button Add Subscriber will appear in the top right. You will click on that, then select group, then click Select Group. Check the right group from the list that appears and that will pull the right list from Group Manager. "Add as dynamic subscription" should be checked. Click Add in the bottom right. That's all you have to do. There is no save button. To confirm and see the list of subscribers, click lists in the left navigation then click on the list name and all the names will appear.

Dashboard

Lists

Messages

Templates

Dynamic Content

Contacts

Settings

HS 9th Grade Girls

Recipients: ⓘ 0 E

Filter by Status: All

Email

No subscribers t

Add Subscriber

Subscribers

Segments

Add Subscriber

CONSTITUENT **GROUP** CONTACT UPLOAD

Search by Email Address

No Group Selected     Select Groups

✔ Add as dynamic subscription

The Primary email address for each constituent currently in the selected group(s) will be subscribed to the list based on the constituent's consent preference. Constituents may update their subscription by accessing Notifications when logged into the site.

Date

CANCEL          ADD

**Creating a Static Distribution List:** sometimes you will need to send an email to a group that cannot be pulled dynamically from our system (this pertains mostly to Advancement). In that case you need to create a list from a spreadsheet.
**Note:** if you are uploading a static list, you need to make note of the people who have unsubscribed in the previous list and then remove them from your spreadsheet before you re-upload. Otherwise people have to unsubscribe every single time you refresh your list which is not good.
**Note:** for static lists, please put this in parenthesis after the list name (As of MM/DD) so that we know from when the list is.

You go through the same process: List page -> Create Mailing List (green button) -> Give name then click Add. Then you go back click Add Subscriber (green button) but instead of clicking on Group, you select Upload. See instructions. Your columns need to be in the right order and the file has to be saved as Tab Delimited (.TXT extension).