

 FINALSITE training

# People and Modules

A look at people management and other common modules





# Agenda: Choose your own adventure

**01** [Constituent Manager](#)

**02** [Group Manager](#)

**03** [Create directories](#)

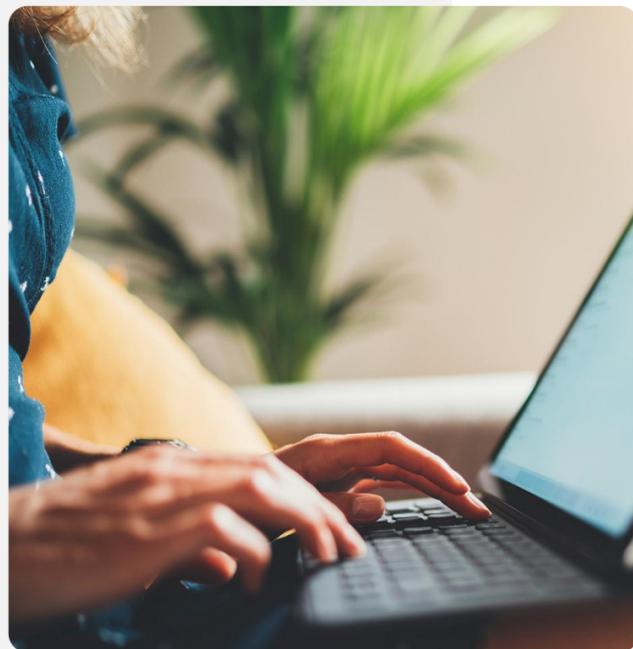
**04** [Admin Users](#)

**05** [Page Pops](#)

**06** [Forms](#)

**07** [Feeds](#)

**08** [Messages](#)



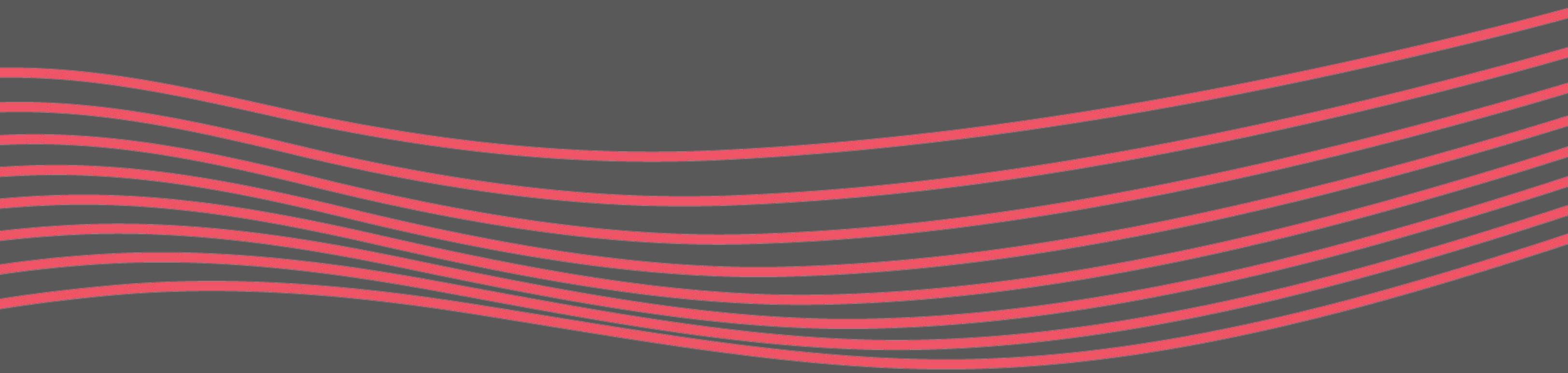
# Homework review

What successes or challenges did you find when working with the following:

- Creating calendars in Calendar Manager?
- Building calendar pages?
- Creating boards and/or posts in Posts?
- Building news pages?
- Building the default board post page?

 FINALSITE training

# Constituent Manager



# Who are the people in your neighborhood?

Your website is all about people.

- People who build your site
- People who visit your site
- People in your community

**How do you empower people to accomplish their goals on your site?**

Constituent Manager



# Everyone has a role

- A **role** is a “bucket” you put constituents in to define their relationship with your organization.
- **Constituents** may be anyone with a relationship to your organization, such as:
  - Faculty & staff
  - Parents
  - Students
  - Board members
- Constituents may have more than one role.
- **Groups** help you make meaningful subdivisions, regardless of a person’s role.

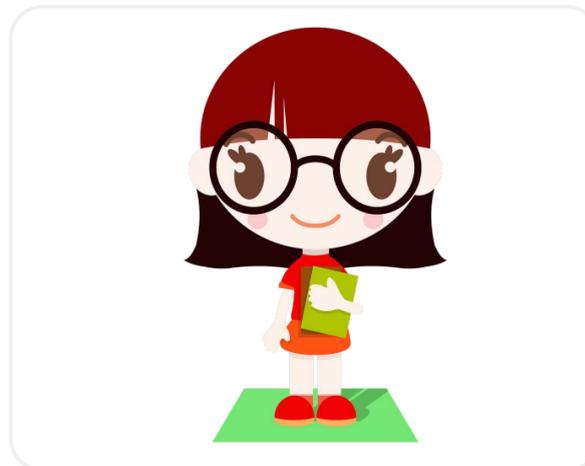


# Different types of accounts



## Admin Users

Admin users have an account to log into Composer. (This is you.)



## Portal Users

You give these people an account to log into the front end of your site.



## Public Users

Public users create their own accounts, e.g. to manage subscriptions.

# Bring in your people

## 1. Add them individually

This works best if you only have a few new people to add.

## 2. Integrate with your SIS

Once the sync is set up, you'll only manage people data in the SIS.

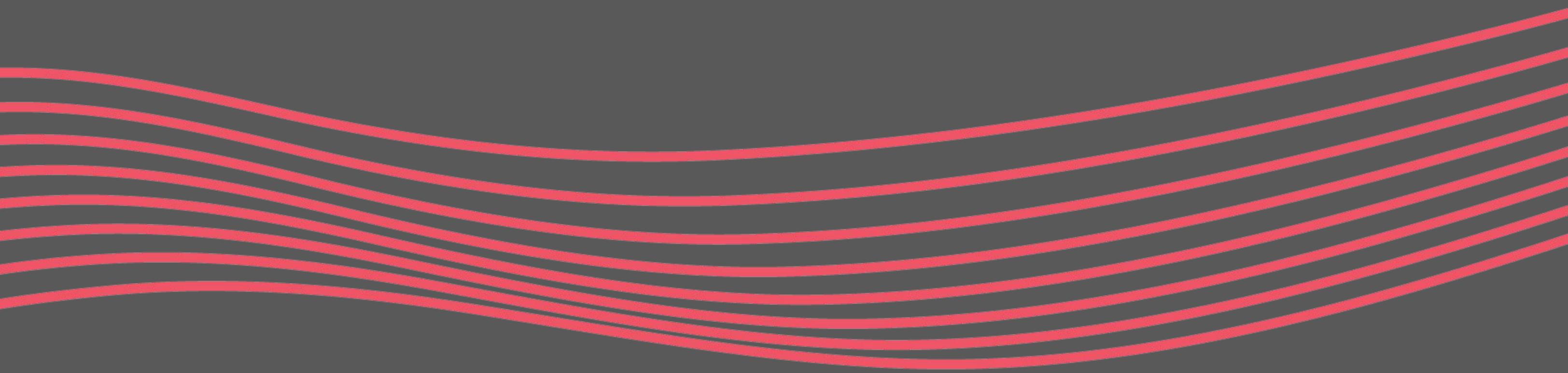
## 3. Upload a datasheet

Send the completed [datasheet\(s\)](#) to Support, or upload them yourself.



 FINALSITE training

# Group Manager



# Groups go beyond roles

Group Manager is a multi-tool that allows you to organize constituents in meaningful ways.

Create as many groups as you want!

Frequently used for:

- Mailing lists
- Accessing private areas of the site
- Using Posts and Resources
- Organizing a directory



# Demo: Make a group

The screenshot shows a web interface for managing a group. At the top, there are tabs for "Group Space", "Members", and "Picture". A "Delete" button is visible in the top right. Below the tabs, there is a green button labeled "+ Select More Members". A blue informational banner explains that members added via filters for eNotify or other groups will only be pulled from that filter and may not meet criteria for other filters. Below this is a table with the following columns: "Via", "Group Role", "Hide Admin", and "Position".

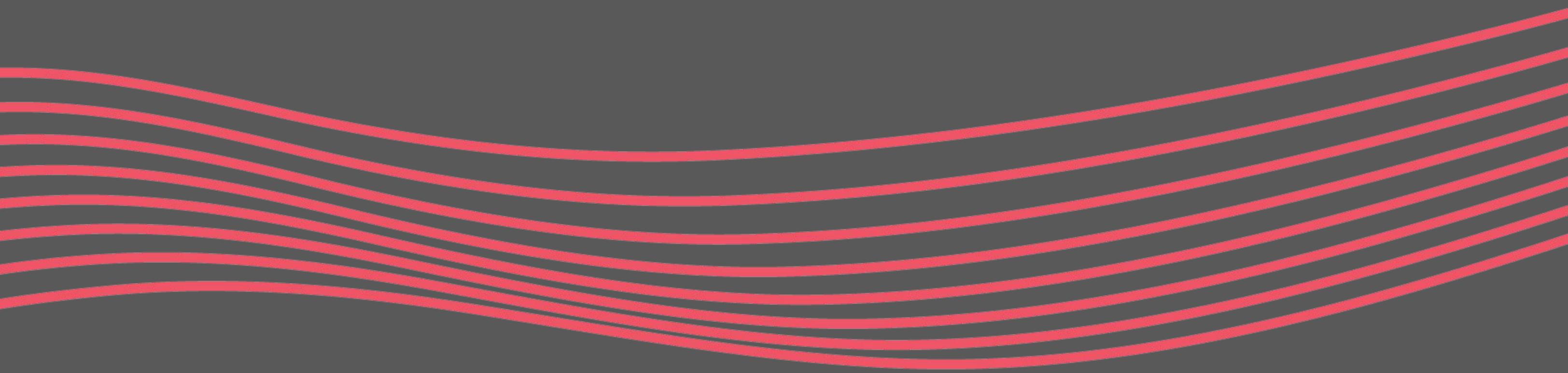
	Via	Group Role	Hide Admin	Position
	✘ Selected *	Member		✉
	✘ Selected *	Member		✉
	★ Filtered	Member		✉
	★ Filtered	Member		✉
	★ Filtered	Member		✉
	★ Filtered	Member		✉
	★ Filtered	Member		✉
	★ Filtered	Member		✉
	★ Filtered	Member		✉

Membership due to being explicitly selected AND filtered.

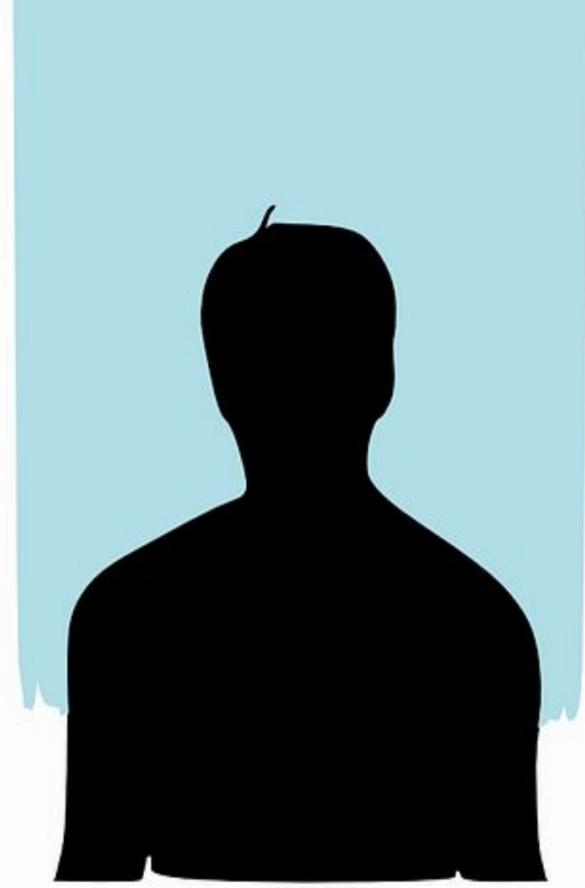
1. Click “Add Group” to create a new group.
2. Ignore most of the settings and just create the group.
3. Add members manually, and/or use **Dynamic Filters** to pull in members based on their constituent profiles.
4. Select members to make them “explicit” and change their group role.
5. Customize the group admin order.

 FINALSITE training

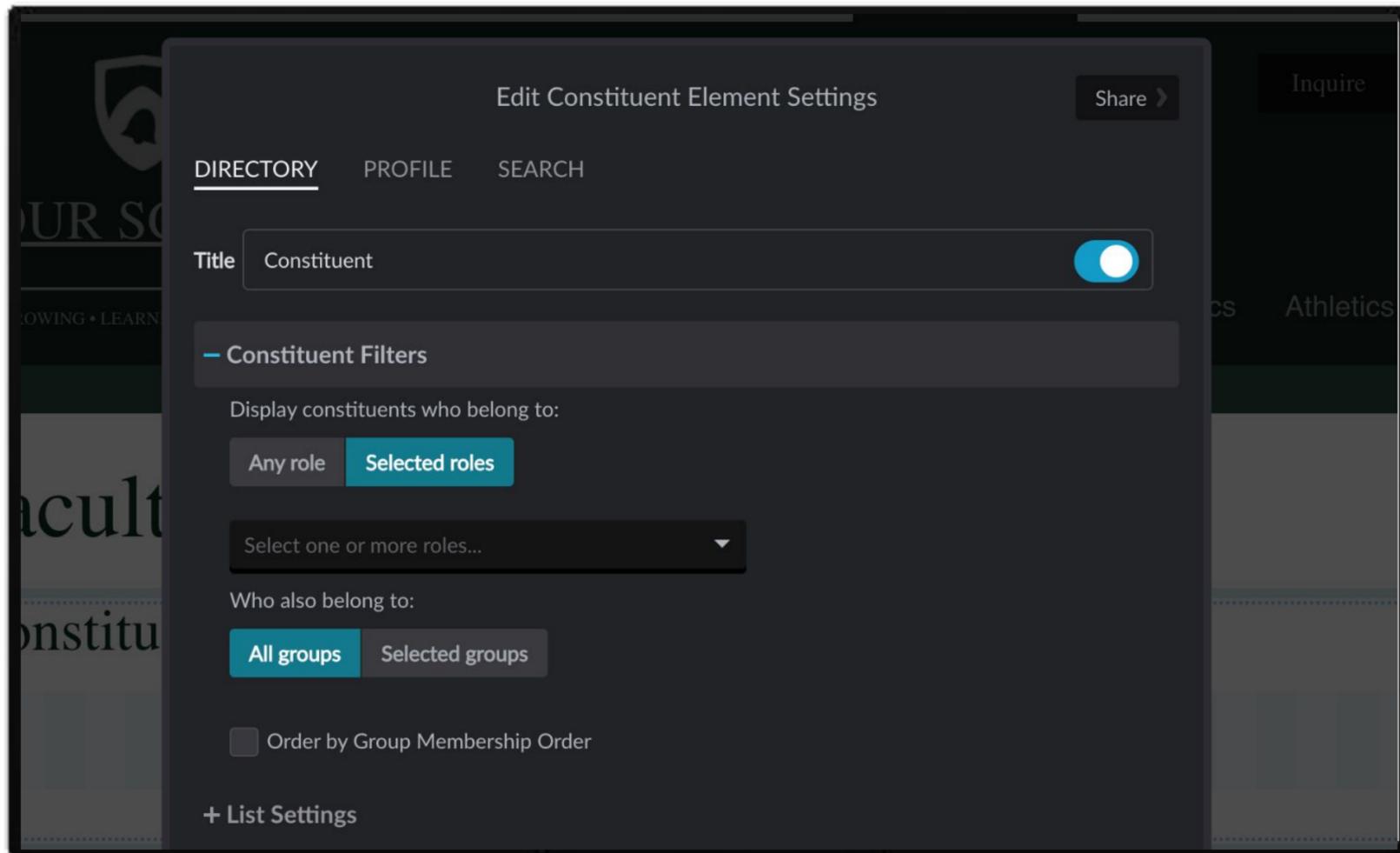
**Create directories**



Create a  
directory  
to help  
people  
connect



# Demo: Build a directory



1. Add a Constituent element (Directory format) to a Composer page.
2. Select which roles and/or groups you want to display.
3. Add another Constituent element (Profile format) to display full profile details.
4. Add another Constituent element (Search format) to create a search feature.

# Extra Credit

## [Webinar: Group Manager](#)

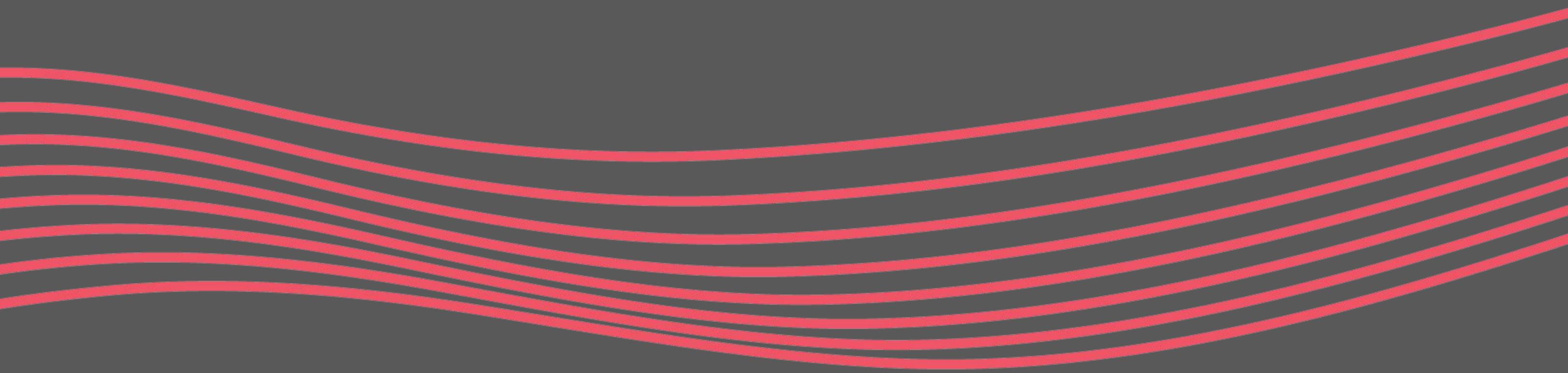
Using groups to simplify your work

## [Webinar: People, profiles, and directories](#)

Utilize constituent and group manager to build directories on your site

 FINALSITE training

# Admin Users

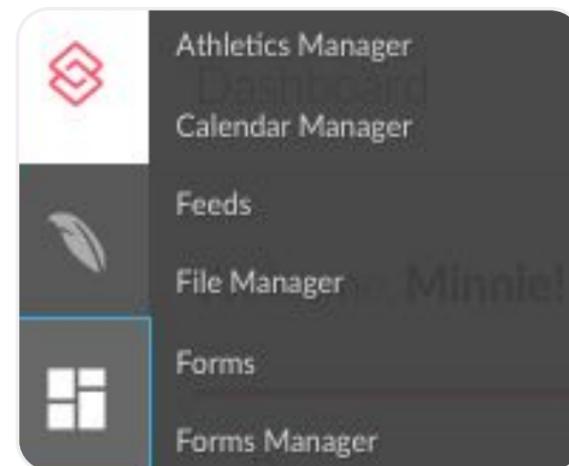


# Who are admin users?

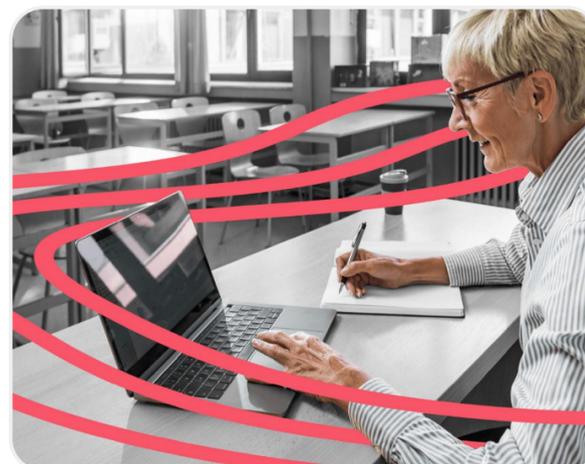


Any user who accesses the back end of your site is considered an admin user.

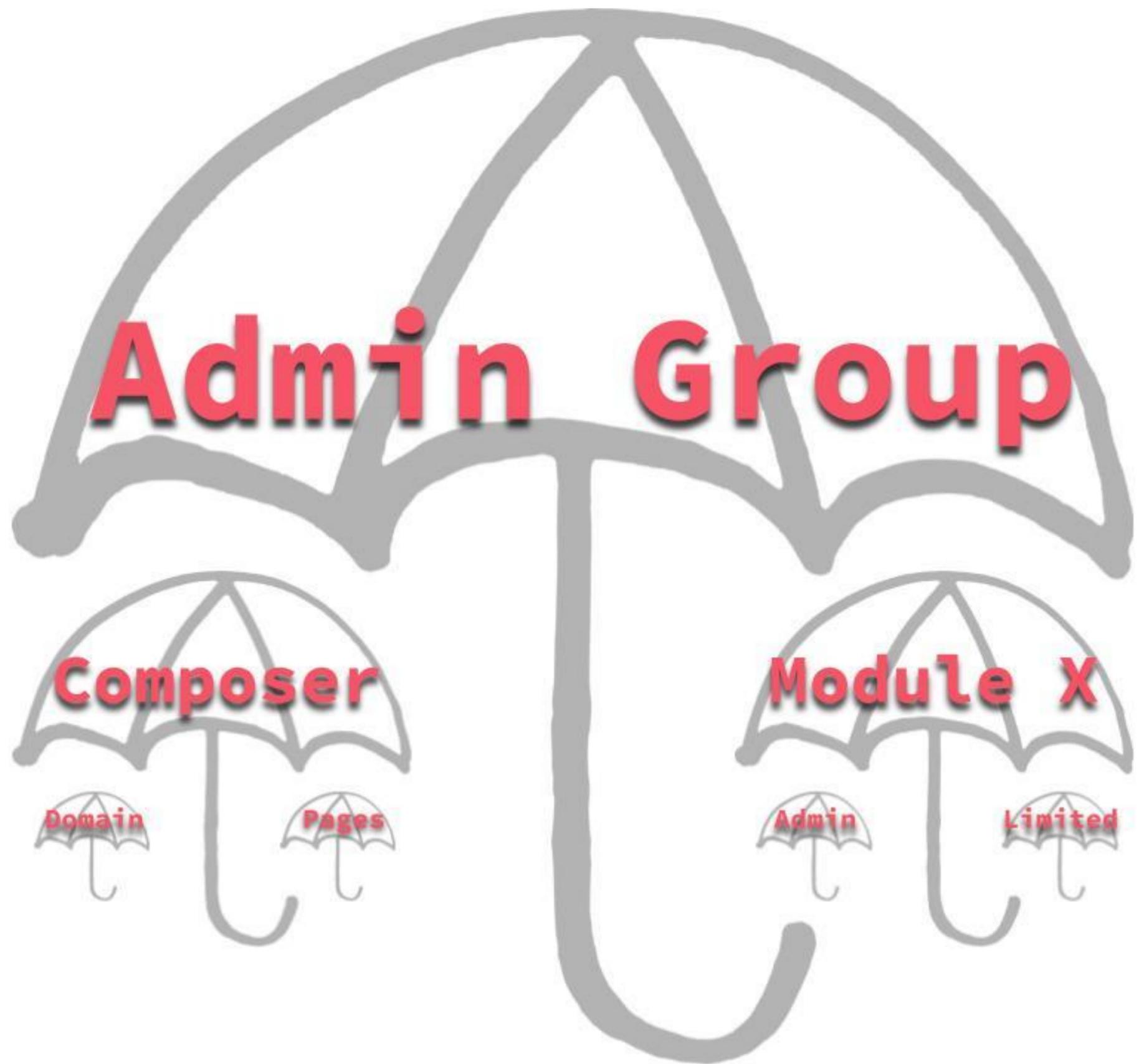
In Composer, might have full access or limited access.



Admin users may only have access to specific modules.

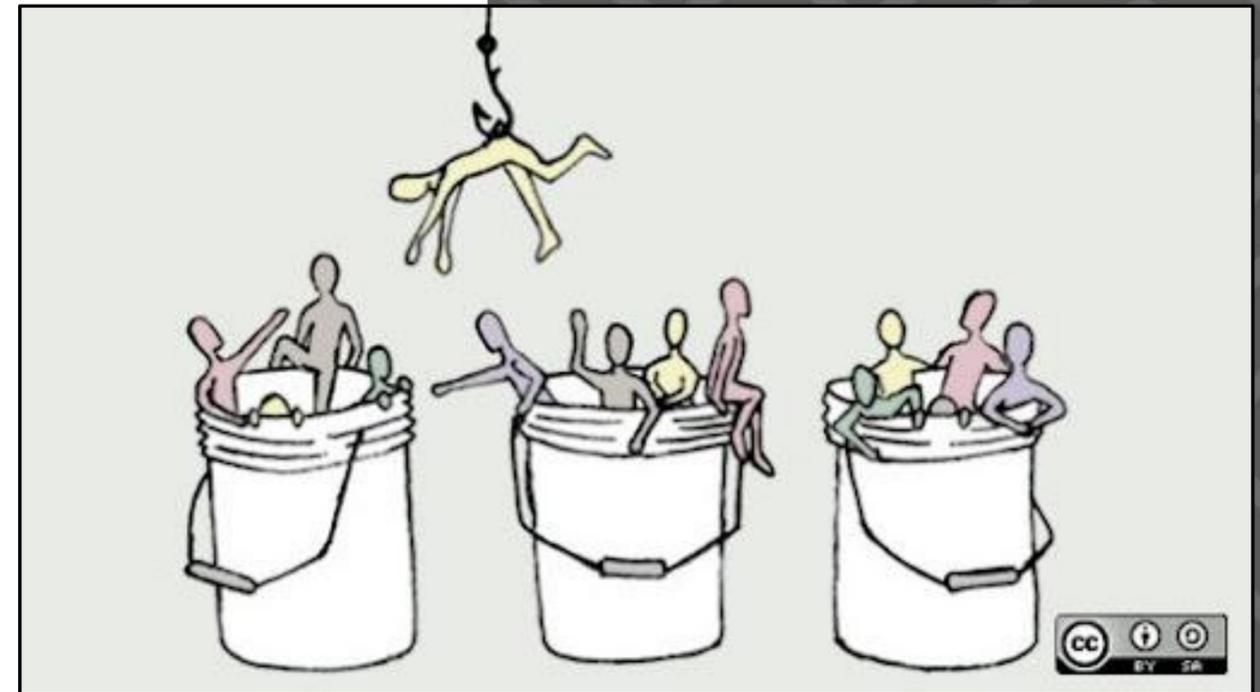


Admin users may manage an entire domain or only a section of pages.



# Admin user groups

You can have as many admin user groups as you need, but each person can only be in **ONE** group.

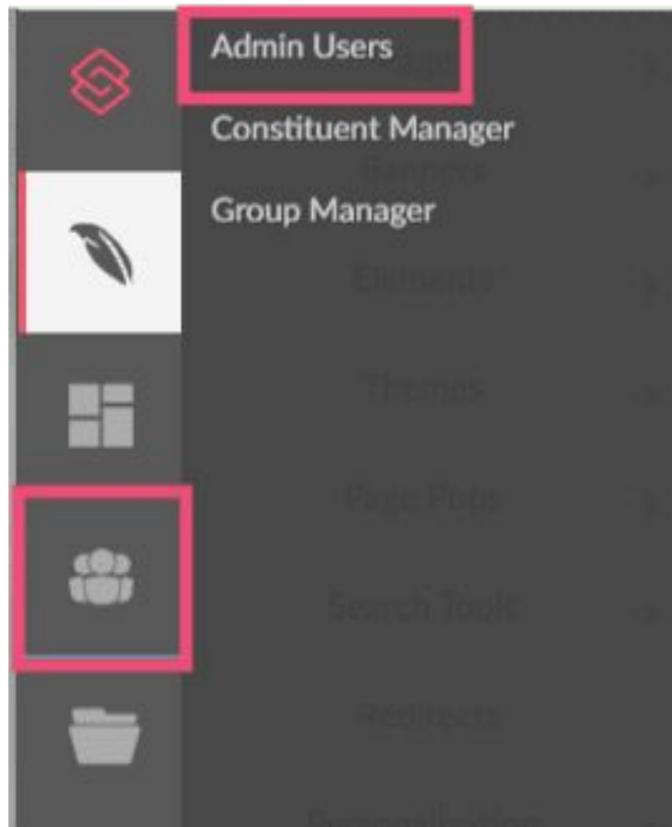


## Best practice:

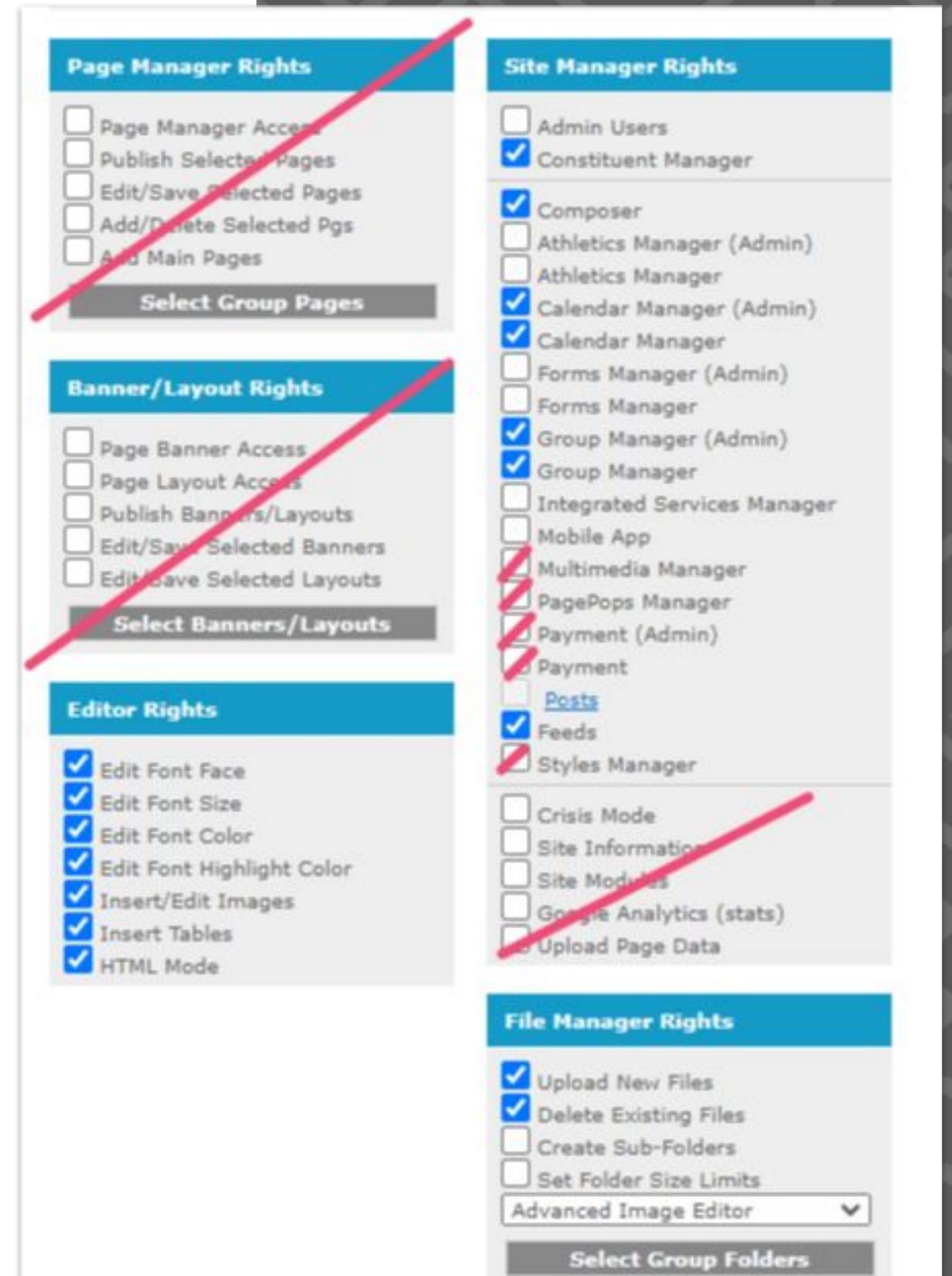
**STEP 1:** Think through the rights a person needs.

**STEP 2:** Put the person in the appropriate group.

# Admin Users Screen



- **Composer**
  - Resources, Galleries, Page Pops, Posts, Forms, Messages
- *Some modules:*
  - Constituent Manager
  - Group Manager
  - Athletics
  - Feeds
  - Editor Rights
  - File Manager (for constituent and athletics)



# Composer Rights >

# Managing Page Content



## Locations

Connect an admin group(s) to a location(s)



## Global Permissions

Access the entire domain



## Page Permissions

Manage one page or a section of pages

# Locations

*“I only want each school’s admins to see their own domain.”*

*Groups with no locations assigned will have access to all locations.*



Locations

- Finalsite ISD
- Glastonbury High School**
- Your Elementary School
- Your High School
- Your Middle School
- + Location

Location Name: Glastonbury High School

Title: Glastonbury High School

Subtitle: Enter a subtitle

Motto: Enter a motto

Address 1: 123 Finalsite Way

Address 2: Enter address 2

City/Town: Glastonbury State/Province: CT

Phone Number: 860-592-1234

Email: Enter an email address

Category: High Schools

**Admin Groups: 3 Selected Groups** Select Groups >

Primary Thumbnail: No Resource Set Browse >

Primary Thumbnail Alt-Text:

Secondary Thumbnail: No Resource Set Browse >  Use Primary Thumbnail

# Composer: Global Permissions



*“They need to be able to edit the entire domain.”*

The default rights that admins have on all pages, and branches for the entire domain.

The screenshot shows the Finalsite Composer interface. On the left is a navigation menu with options: Pages, Banners, Elements, Themes, Page Pops, Search Tools, Redirects, Personalization, and Permissions (highlighted). The main content area is titled 'Permissions' and displays a table of user groups and their permissions for Pages and Banners.

Groups	Pages	Banners
Administrators	Admin	Admin
Content Managers	View	View
Counseling	View	View
Editors	Not Allowed	Not Allowed
GHS Admins	View, Edit, Pu	View
GHS Athletics	View	View
GHS Forms and Events	View, Edit & Publish	View
GHS Front Office	View	View
MS Admins	View	View
Webmasters	View	View
ZES Admins	View, Edit, Pu	View
ZES Media Center Specialist	View	View

A dropdown menu is open for the 'GHS Admins' group, showing the following options: Not Allowed, View, View & Edit, View, Edit & Publish, View, Edit, Publish & Delete (highlighted), and Admin.

# Composer: Global Permissions



*“Well, they really just need to manage one page or a section of pages.”*

Give “View” access in global permissions. Then...

The screenshot shows the 'Permissions' section of the FinalSite Composer interface. On the left is a navigation menu with options: Pages, Banners, Elements, Themes, Page Pops, Search Tools, Redirects, Personalization, and Permissions (highlighted). The main content area is titled 'Permissions' and features three columns: Groups, Pages, and Banners. A table lists various user groups with their corresponding permissions for Pages and Banners. A dropdown menu is open for the 'GHS Athletics' group, showing options: View (selected), Not Allowed, View & Edit, View, Edit & Publish, View, Edit, Publish & Delete, and Admin.

Groups	Pages	Banners
Administrators	Admin	Admin
Content Managers	View	View
Editors	Not Allowed	Not Allowed
GHS Athletics	View	View
GHS Forms and Events	View	View
GHS Front Office	View	View
HS Admins	View	View
MS Admins	View	View
Webmasters	View	View
ZES Admins	View	View
ZES Media Center Specialist	View	View

...increase their permission level on their specific page(s)



Each page (and branch) has its own permissions, found in Page Settings.

Page Settings

GENERAL LINKED SEO NAV INFO ACCESS CONTROL **PERMISSIONS**

Groups Pages Page Pops

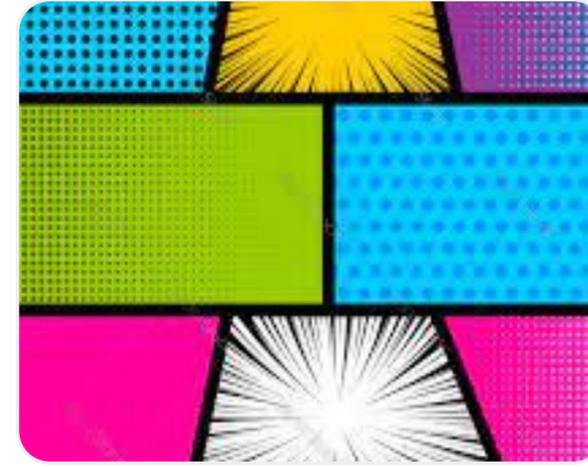
Administrators	Global (Admin)	Global (Allowed)
Content Managers	Global (View)	Global (Allowed)
Counseling	Global (View)	Global Permissions Not Set
Editors	Not Allowed	Global Permissions Not Set
GHS Admins	Global (View, Edit, Publi	Not Allowed
GHS Athletics	Global (View)	Global Permissions Not Set
GHS Forms and Events	Global (View, Edit, Publi	Global Permissions Not Set
GHS Front Office	Global (View)	Global Permissions Not Set
MS Admins	Global (View)	Global (Allowed)
Transportation	Global (View)	Global Permissions Not Set
Webmasters	Global (View) Not Allowed View View & Edit	Global Permissions Not Set
ZES Admins	View, Edit & Publish	Global (Allowed)
ZES Media Center Specialist	View, Edit, Publish & Delete Admin	Global Permissions Not Set

# Module permissions



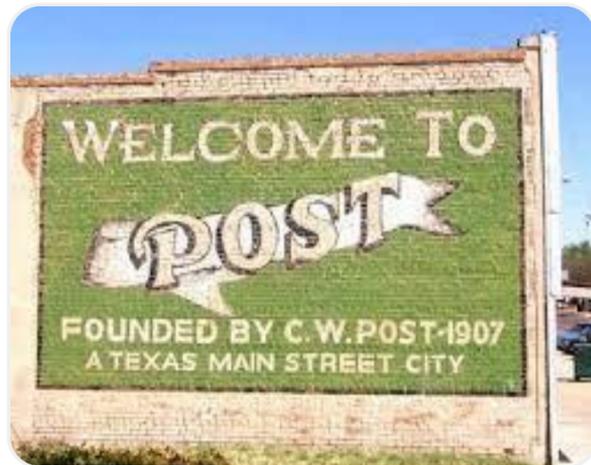
## Resources & Galleries

Create a top-level folder and gallery, then assign permissions.



## Page Pops

Create folders; user can only apply Page Pops on the pages they have access to.



## Posts

Assign permissions by board (all posts or my posts); set locations on folders.



## Calendar Manager

Organize calendars into groups to better manage rights.

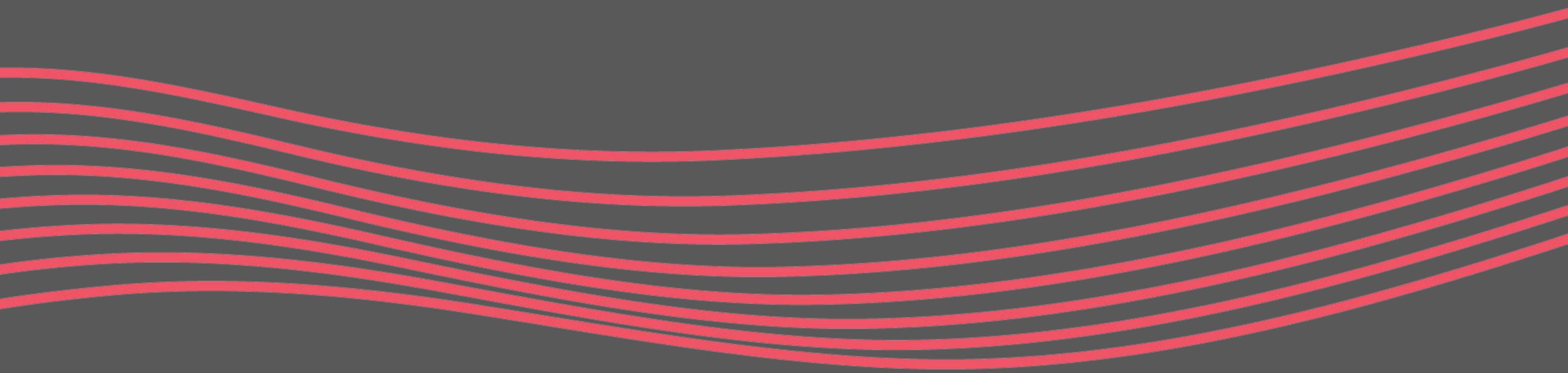
# Extra Credit

## [Webinar: Admin Users for Districts](#)

Step-by-step guide to get admins working on your site

 FINALSITE training

# Page Pops



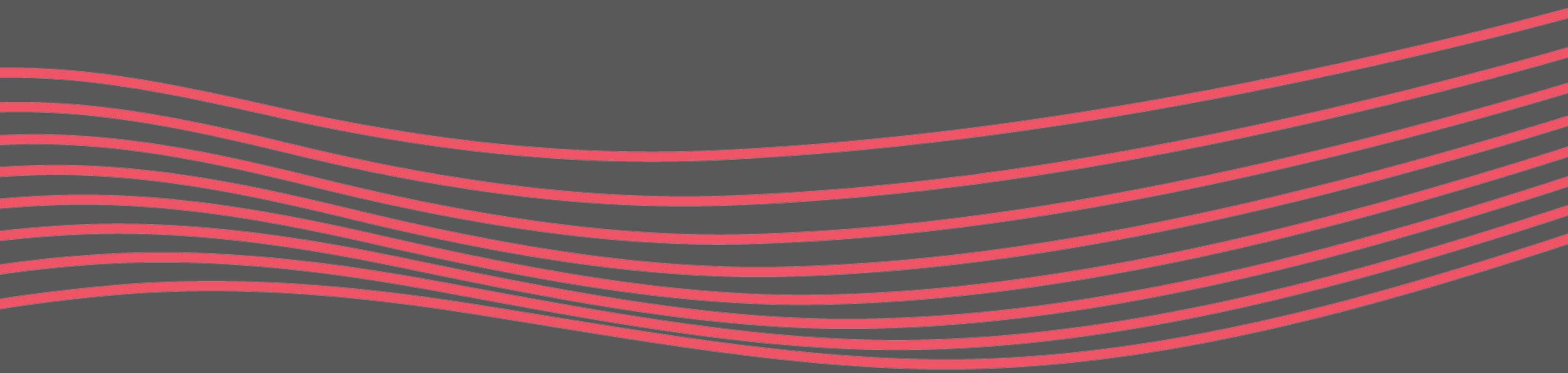
# Page Pops

- Page pops allow you to post a “pop-up” announcement on any page(s) you choose.
- Admins can only add page pops on pages which they have permission to publish.
- These will have a start/end date.
- Users can choose to not display a page pop, but an indicator will appear for any messages they have “hidden.”



 FINALSITE training

# Forms



# Our 5-star fields!



Experiment with our favorite top 5 fields!

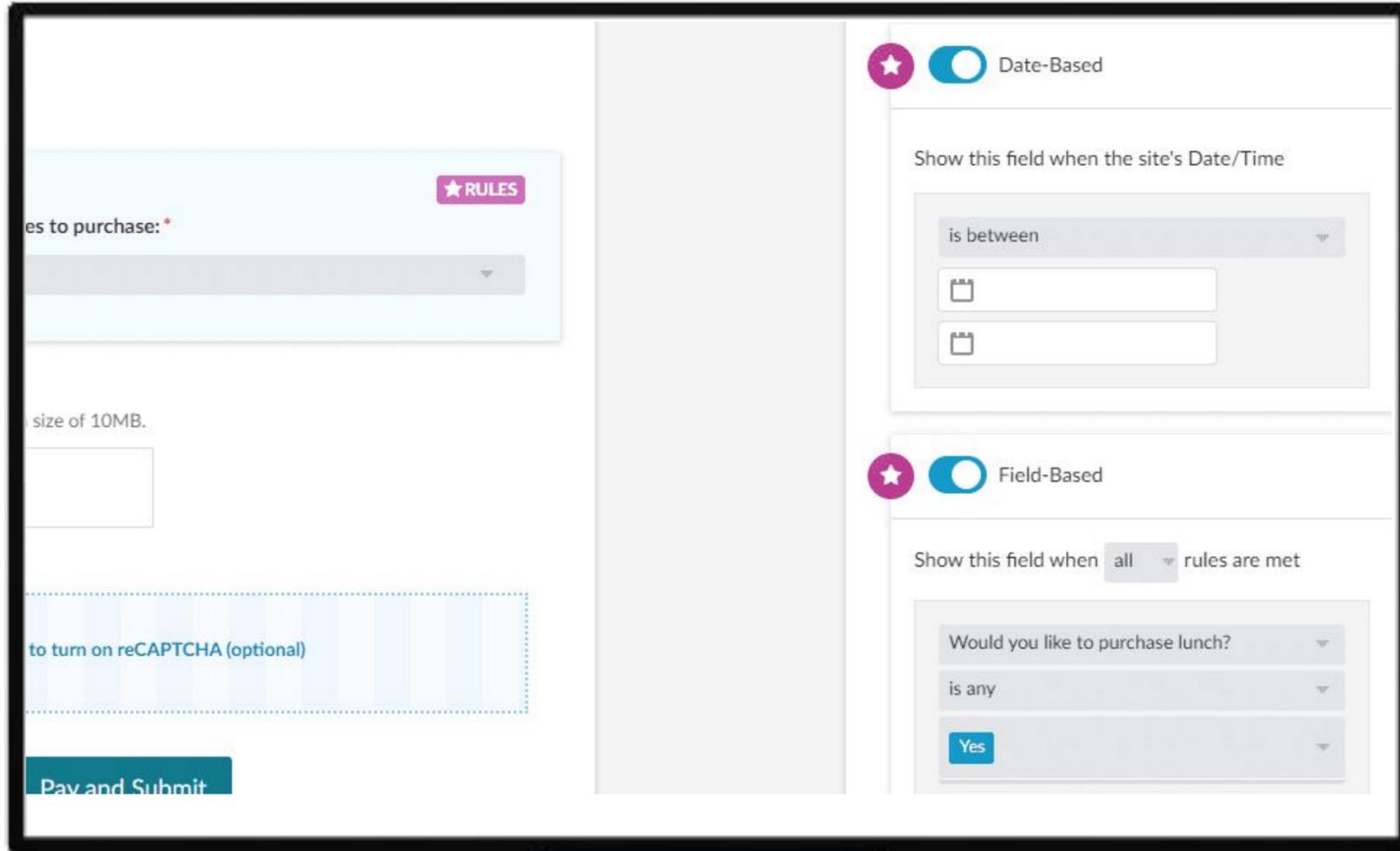
- ★ Multiple Choice (set a max allowed)
- ★ Rating (easy survey tool)
- ★ Fee (charge a flat rate)
- ★ Date (only allow specific days)
- ★ Terms of Service (check to agree)

A screenshot of a form builder interface. At the top, there are tabs for 'Form', 'Settings', and 'Submissions'. Below the tabs, there are '+ Add' and 'Edit' buttons. A light blue banner says 'Click or drag fields to build your form'. The interface is divided into sections: 'PROFILE FIELDS' with 'Name' and 'Email Address' fields; 'BASIC FIELDS' with 'Short Answer', 'Long Answer', 'Single Choice', 'Multiple Choice', 'Rating', 'Dropdown Menu', 'Currency', 'Fee', 'Date', 'File Upload', and 'Terms of Service' fields. The 'Terms of Service' field has a checkmark icon. At the bottom, there is a 'LAYOUT FIELDS' section.

# Conditional rules

Conditional rules mean that a field only displays when it's relevant, or that an admin only gets notified when they need to know.

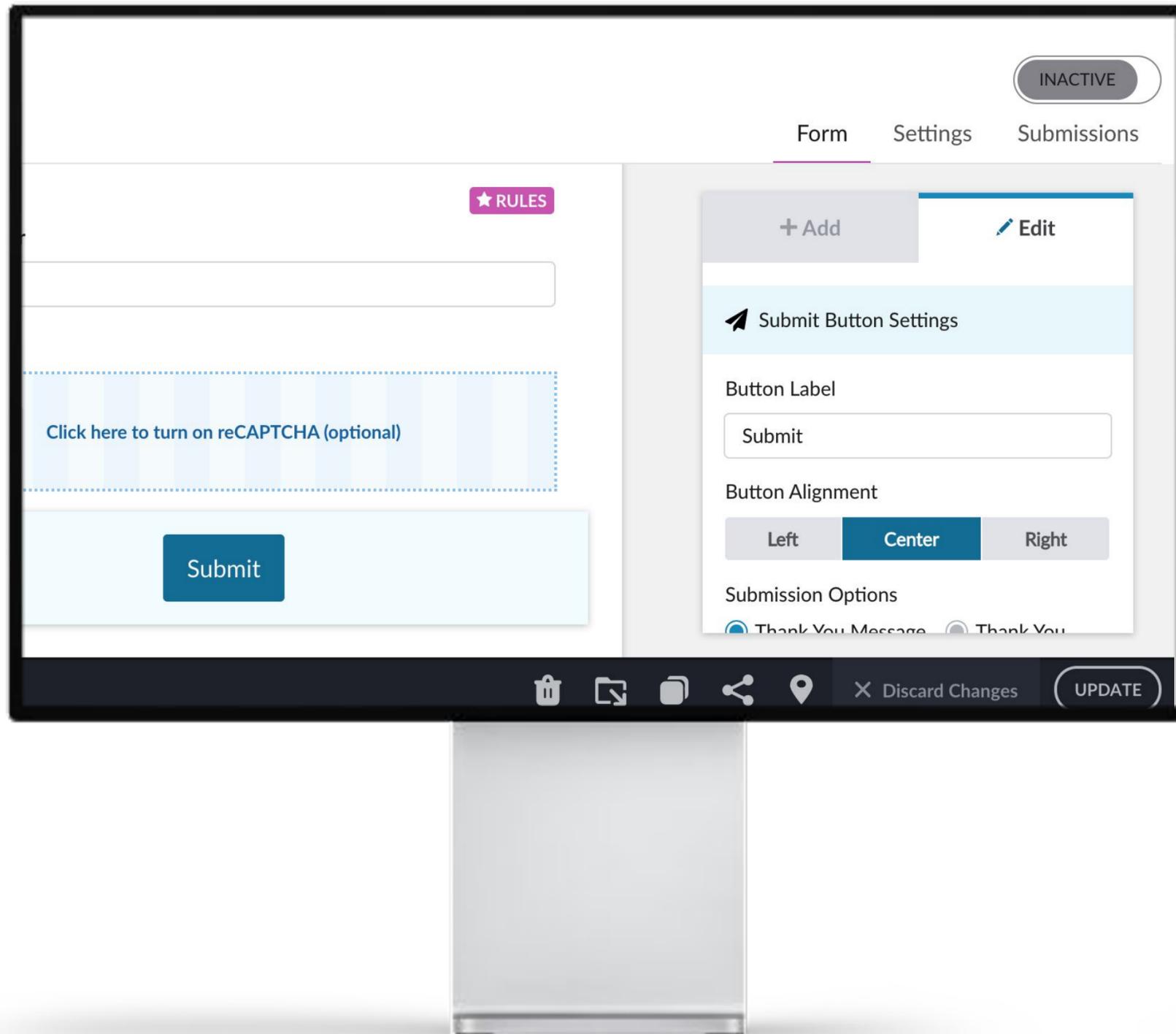
- Date-based conditionals
- Field-based conditionals
- Conditional notifications



# Submit options

What happens when your user submits the form you just built? Click on the Submit button to find out!

- Button appearance options
- Thank-you message or redirect
- Admin notification email
- Submitter confirmation email

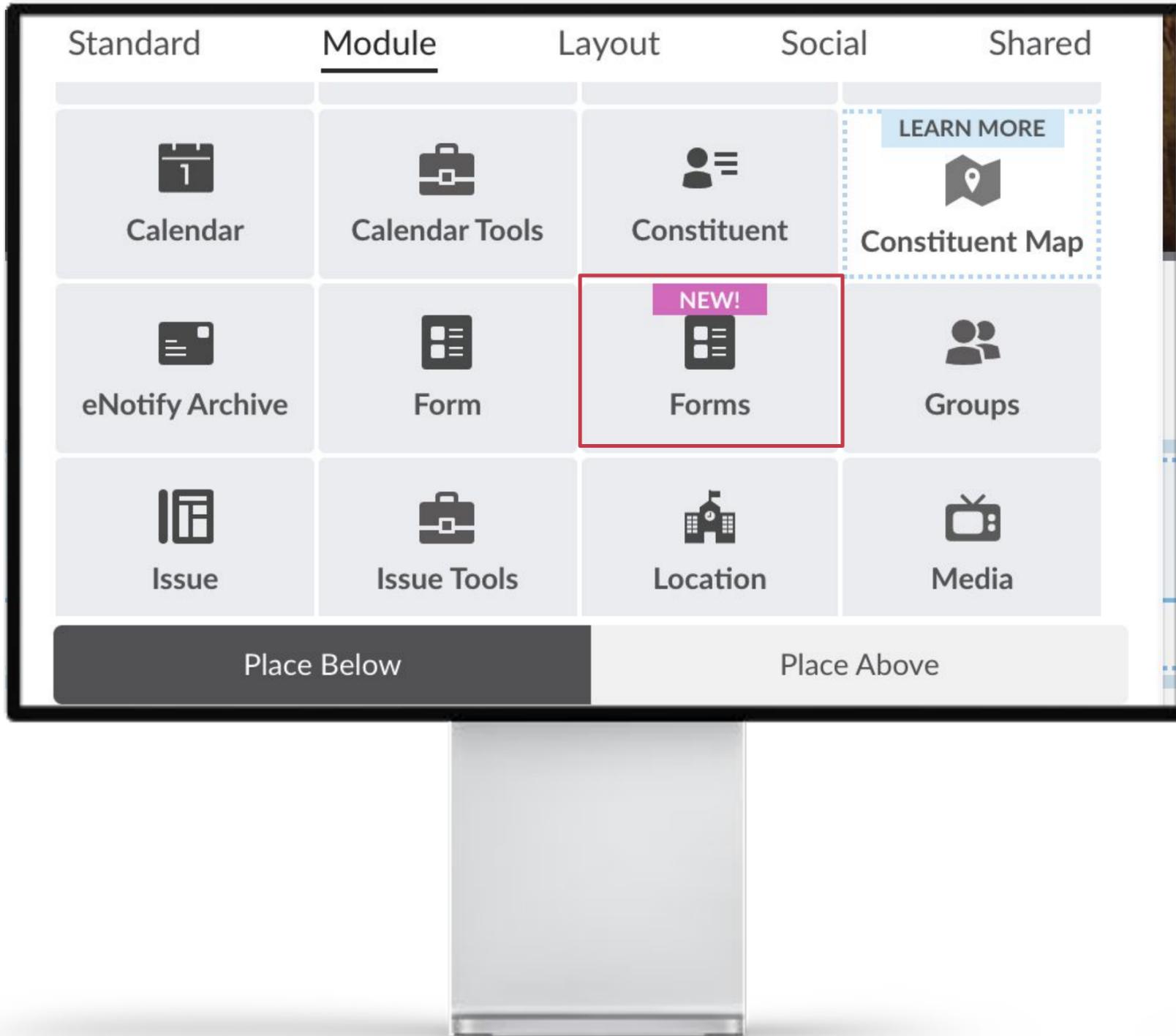


# Collecting payments

Follow these steps to begin collecting payments with Forms.

- 1.** Confirm whether your payment gateway is available in Forms. If not, submit the payment gateway setup form:  
<https://www.finalsite.com/paymentgatewayrequest>
- 2.** Set up your offline payment types.
  - Offline = Anything that's not a credit card
- 3.** Select the payment types for a specific form.
- 4.** Customize the payment instructions.

# Share/display a form



Get your form out there so people can see it and start responding!

- Set your form to “Active.”
- Use the “share” icon to grab the direct URL for the form.
- Display a form in an element.

# Extra Credit

## [Webinar: Know more about Forms](#)

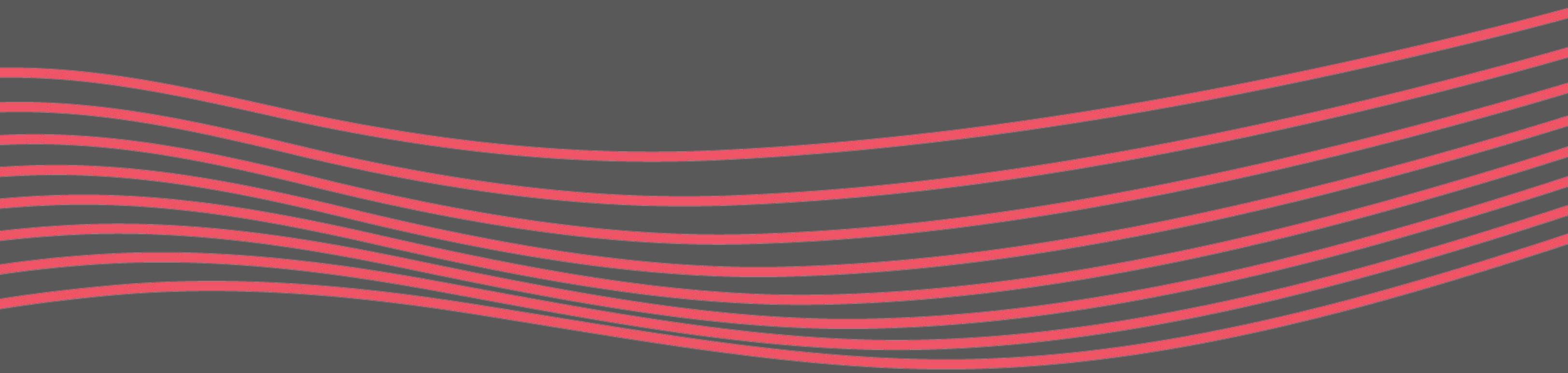
Learn more about how forms can work for you

## [Webinar: Building forms for events](#)

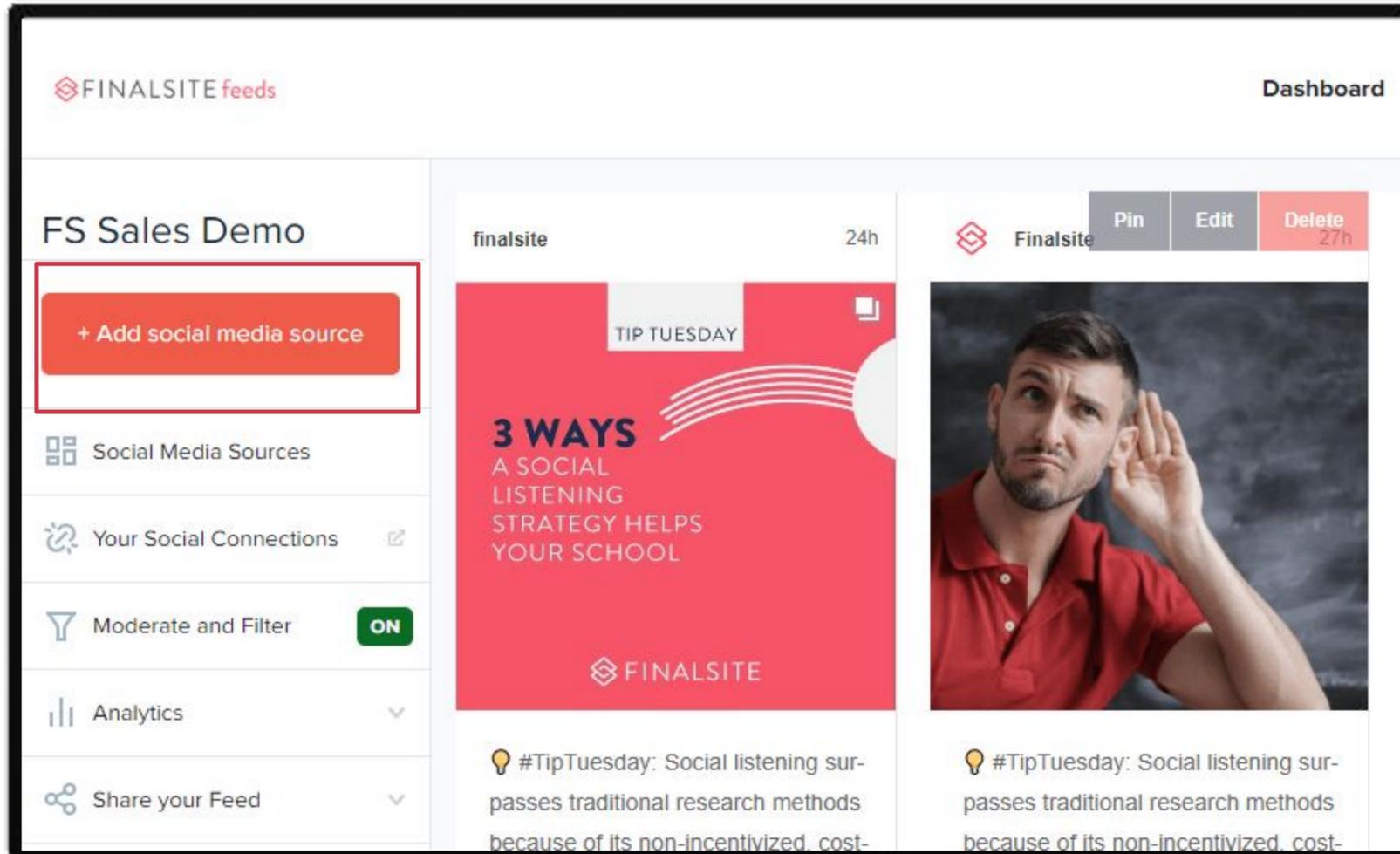
Learn how to efficiently collect attendee information and collect payments

 FINALSITE training

# Feeds



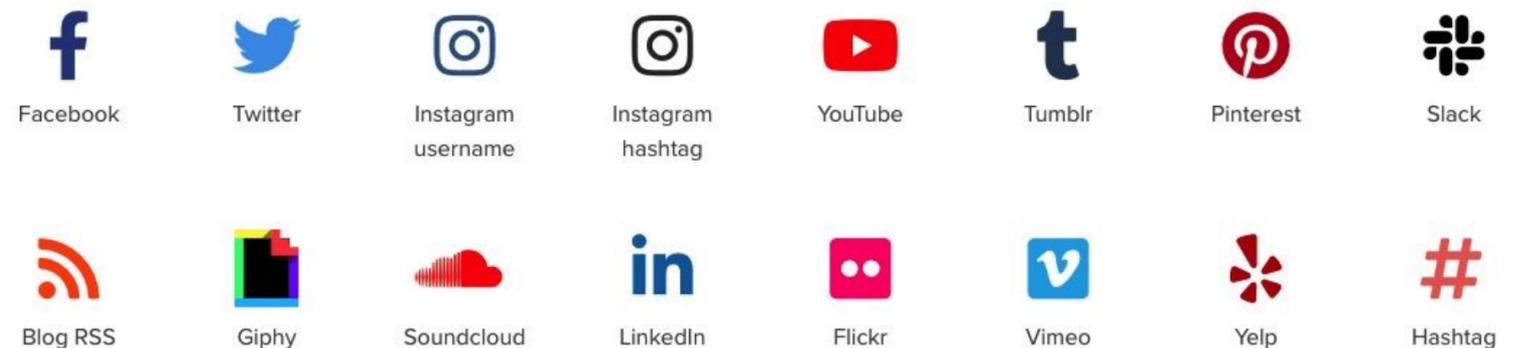
# Add feed source



- Click the add social media source button
- Select the source
- Follow the onscreen prompts to connect

## Add a Social Media Source

First, select the social media platform you want to import posts from.



# Facebook & Instagram

- These must be connected first before adding them as a feeds source.
- You will need the credentials to login.
- Facebook asks to continue as “you” - this is ok; you will not be displaying your personal posts.
- These sources will expire and nothing will remind you to do so. Pro-tip: Set a calendar reminder on the date noted to update the connection.



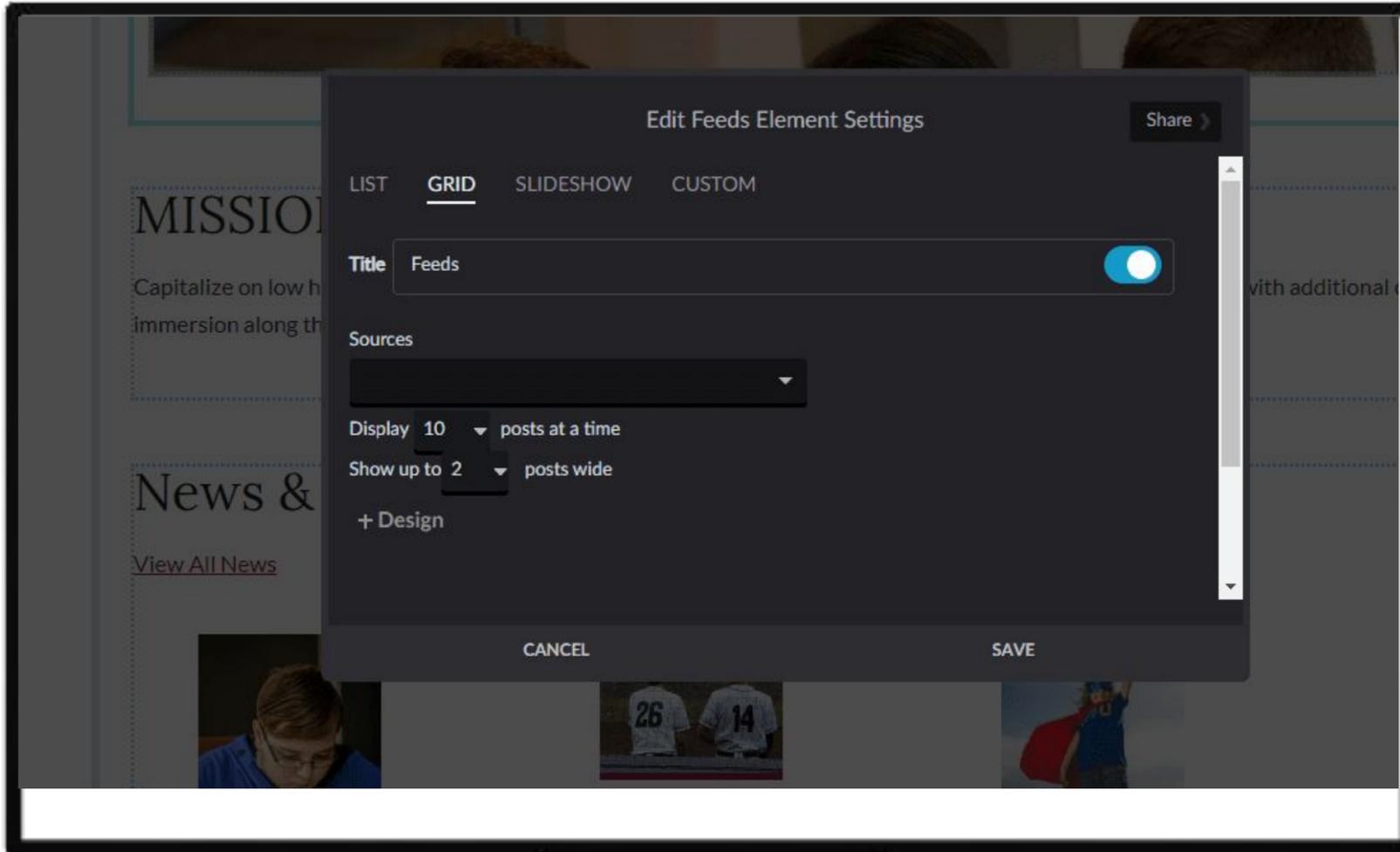
## Instagram usernames

Connected as: **finalsite\_test**  
Connection status: Valid until **16 Sep 2021**

Need help? Read our [help article](#) for connecting to the new Instagram username API.



# Display Feeds



- Use the Feeds element (in the Social element library)
- Customize the element to display the source(s) from the available connected feeds

# Extra Credit

[KB Article: Adding, deleting, and configuring Feeds sources](#)

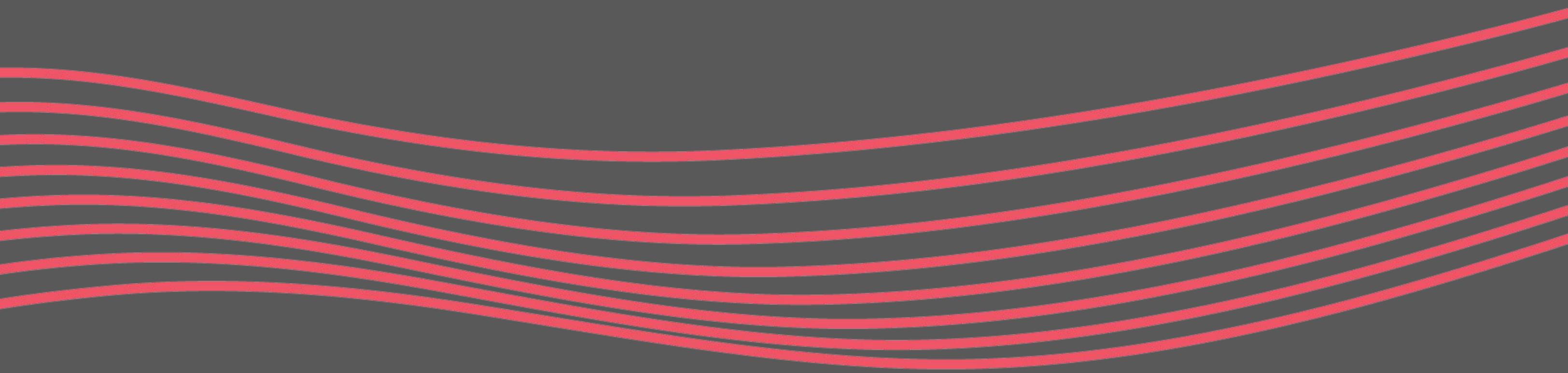
[KB Article: Connecting a Facebook account in the Feeds module](#)

[KB Article: Connecting an Instagram account in the Feeds module](#)

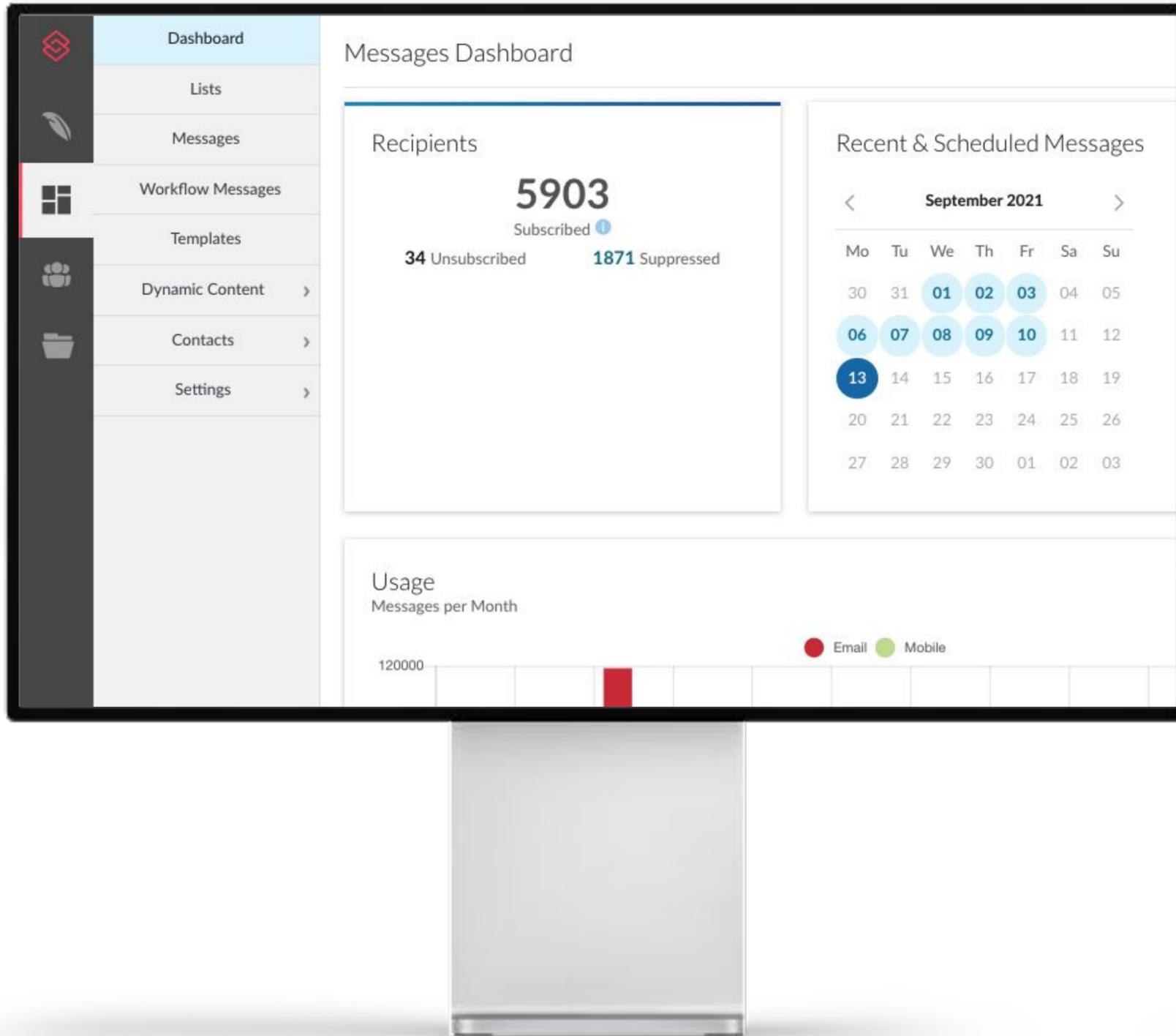
[KB Article: Moderating and filtering posts](#)

 FINALSITE training

# Messages



# Sections of Messages



## Dashboard

**Lists:** Create mailing lists to target users

**Messages:** Create and send messages to lists

**Templates:** Build templates to use in messages

**Dynamic Content:** Configure content to pull into messages

**Contacts:** Find Recipient and Suppressions

**Settings:** Set fonts and reply-to addresses

# Templates

**Templates** let you reuse a consistent design for your repeat communications.

Start from scratch or choose a template from the dropdown to “clone” an existing layout.

Decide how you want your message to look on mobile and desktop.



## Create your structure

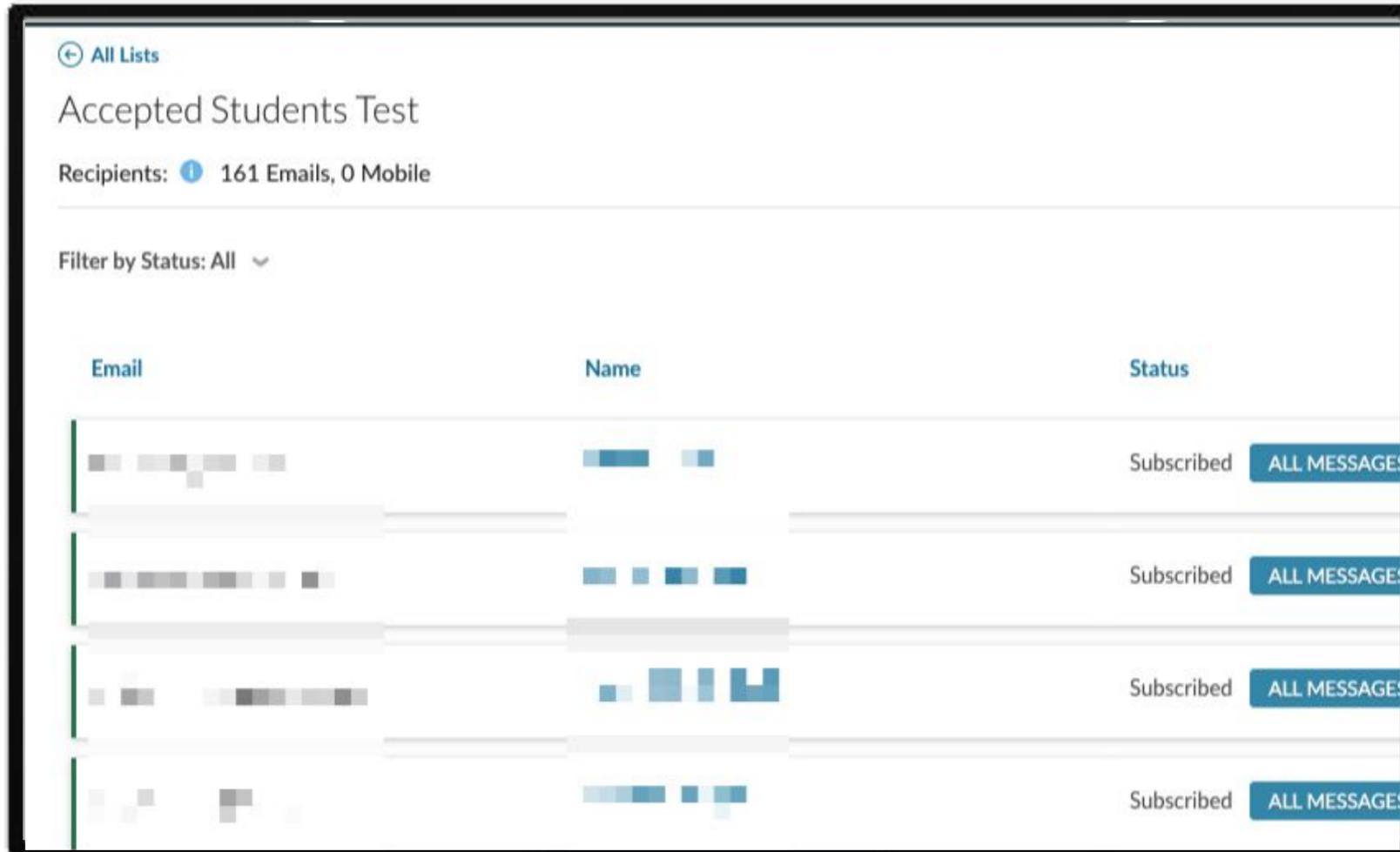
Use rows to customize your layout and set column properties.

## Add content

Text, image, button, divider, social, dynamic content, HTML, and video.

## Lock it down!

Prevent non-admins from editing when they use that template for a message.



# Lists

**Lists** help keep your messaging consistent, a key approach to improving your communications effectiveness.

- Add constituents to a list individually, by group, contact, or by list upload.
- Users can set their own consent preferences for how they want to receive messages.
- “Allow mobile notifications” to set up push notifications for your app.

# Message

Now that you've created your **List** and **Template**, you can easily create and send your **Message**.

- Internal name **vs.** subject line
- Promotional **vs.** Important Announcement
- SMS and Voice are part of our [XR package](#)

The screenshot shows a user interface for creating and sending a message. At the top, there are tabs for 'Send', 'Promotional', 'Important Announcement', 'Message To', 'Daily Updates', 'Segments', and 'All Subscribers'. Below this, there are buttons for 'Email 6' (with a green checkmark), 'Mobile Apps 0', 'SMS 0', and 'Voice 0'. The 'Email Details (English)' section shows '6 subscribers' and a 'Languages (1)' dropdown. The 'Subject Line' field contains '%firstname% - Buy tickets now for our breakfast!' with a character count of 48. Below it, there is an 'Add Personalization' section with 'First Name' and 'Last Name' buttons. The 'From Label' field contains 'Athletics Department' with a character count of 20. The 'Reply-To' field is empty. On the right side, there is a 'Message Preview' showing a desktop setup with a laptop, a lamp, and a desk calendar. The preview includes the 'FinalsiteAcademy' logo and the text 'An Announcement from Finalsite Academy'.

The screenshot shows a web interface for 'Dynamic Content'. On the left is a sidebar with a back arrow and the text 'Dynamic Content'. Below this are three menu items: 'Athletic', 'Calendar', and 'Posts', with 'Posts' highlighted in light blue. The main content area has a header 'Dynamic Content' and a green '+ Content' button. Below the header is a table with two columns: 'Title' and 'Created'. The table contains one row with the title 'Christmas Cookies' and the creation date '12/5/2018 11:...'.

Title	Created
Christmas Cookies	12/5/2018 11:...

# Dynamic Content

Features like Calendar or Posts can be added to templates for hands-off integration of updated content.

Create unique configurations for your communications:

- Alumni Calendars
- Campus Events
- News Categories
- Sports Teams

# Contacts

Find out a user's Messages history in the **Find Recipient** section. Search by email address to view:

- Sent, delivered, opened, and clicked statuses of messages
- All constituents connected to a particular email address

See which recipients aren't receiving your emails in **Suppressions**.

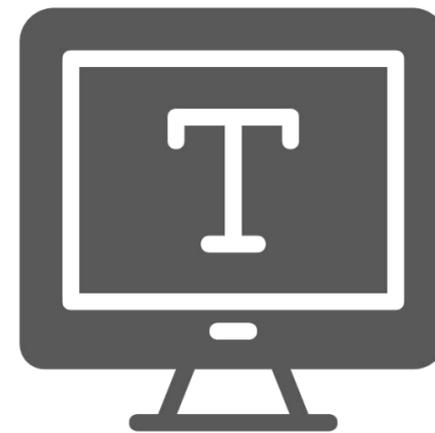
- Filter by Bounced, Complained, Unsubscribed, or No Messages
- Unsuppress users by selecting “+”

# Settings



## Reply-To Addresses

Add additional reply-to addresses. Emails must be verified through an emailed link.



## Fonts

Select which fonts are available for your Messages users. Additional Google Fonts can be added via Support.

# Messages best practices

## Do

Organize mailing lists by purpose, not by description of the constituents.

## Don't

Use the “Important Announcement” feature for nonessential messages.

## Do

Copy and paste plain-text only.

## Don't

Name your list something that you wouldn't want subscribers to see.

## Do

Use Dynamic Content to reuse content that's already on your website.

## Don't

Resubscribe constituents who have unsubscribed without their permission.

# Extra Credit

## [Webinar: Know more about newsletters](#)

Construct and work on creating amazing newsletters in Messages

## [KB Article: Messages FAQs](#)

# Next Steps

- Visit our [resource portal](#) for all the things you need to know
- Get [inspiration](#) from other sites
- Attend [Office Hours](#) for live Zoom calls
- [Extend your learning](#) with webinars and event training
- Use the “Ask a Question” feature in the training courses

