

Communications

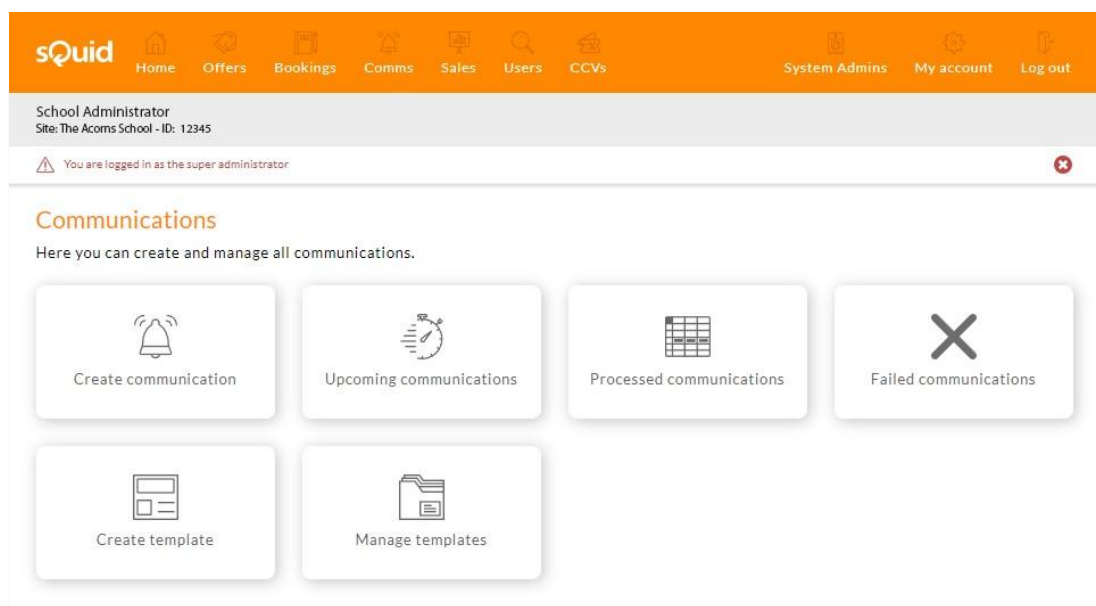
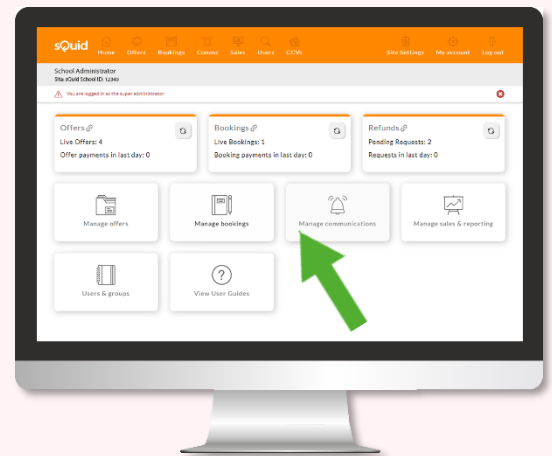
sQuad Trips & Offers User Guide

Home page: MANAGE COMMUNICATIONS

Select **Manage communications** to create and view communications.

In this area you can create **emails, SMS and letters** via **sQuad Trips & Offers** to send to users in relation to offers, bookings, or any other school-related issues.

If your school uses SIMS, please ensure that your MIS is up to date with the correct priority levels for parents, parental responsibilities and contact email address.



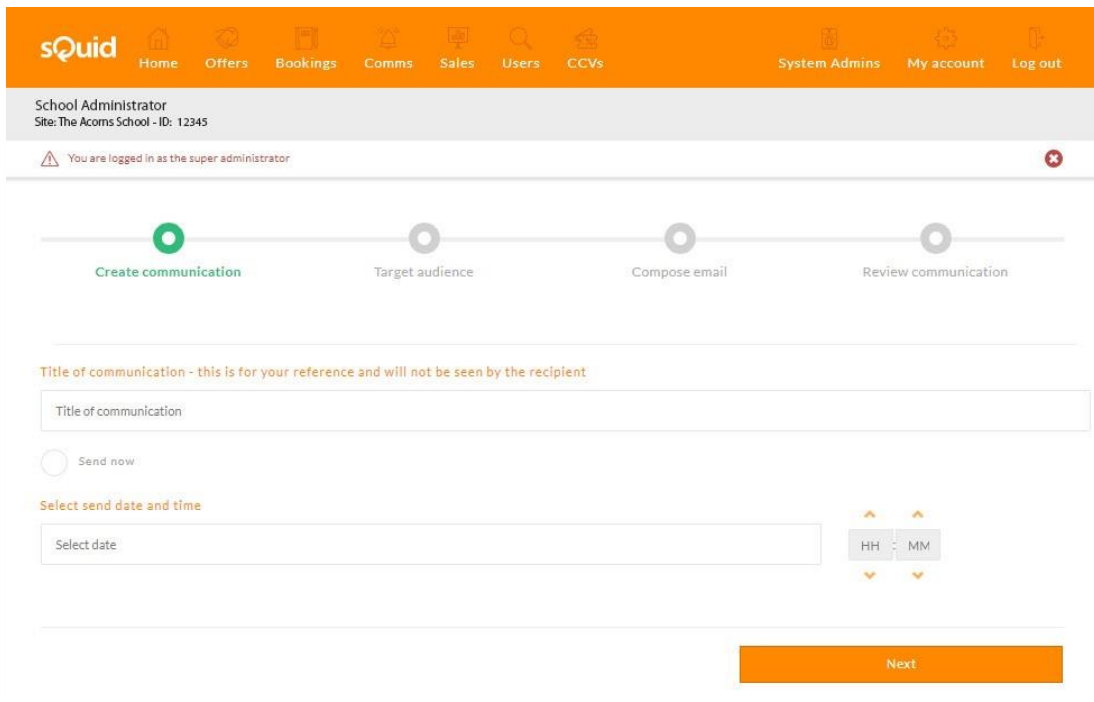
01 Create communication

Select **Create communication** to setup **email, SMS** and **letters** to be sent to the contact details held on record for users.

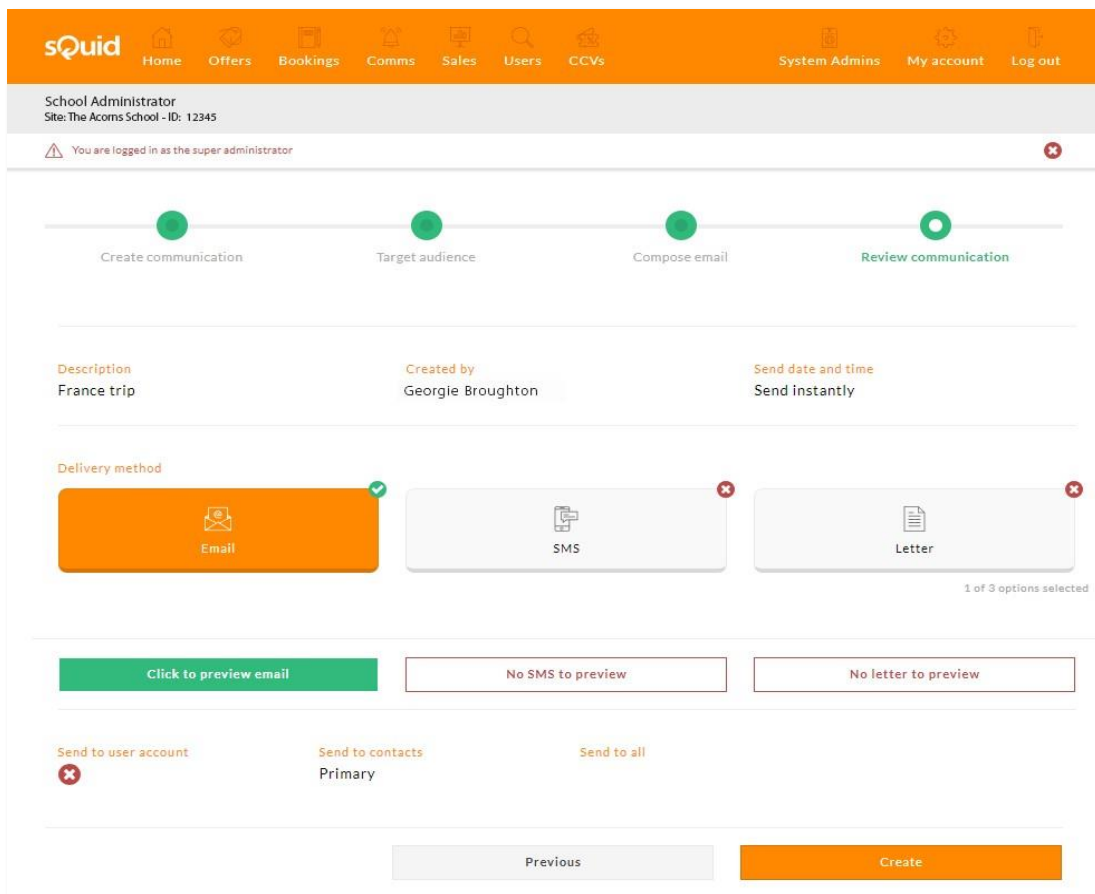
- Select a pre-existing **template** from the drop-down menu, or click on each delivery method (**email, SMS** and **letter**) you wish to use. The **method** icon will be highlighted, and a **green tick** displayed.

*If you have selected a **template**, the delivery method/s will be restricted to those associated with this template* • Select the **communication title**

- Select the **time** (24-hour clock) and **date** to send the communication, or select **Send now**



- Select the **target contact (Primary, Secondary or All contacts** as populated by your MIS data), and the **intended recipient users**, from **Target all, Users and groups**, or by **Offer**. Then click **Next**.
- Follow the steps to **create your communication**, which will depend on the method chosen. Then click **Next**
- **Review your communication** summary on the next screen. Click the **Click to preview** box to preview your communication. Click **Previous** to go back a step and **edit** it. When you are happy, click **Create**



02 Upcoming communications

In this area you can **view and amend** any communications **already created but not yet sent**.

Squid School Administrator
Site: The Acorns School - ID: 12345

You are logged in as the super administrator

< Back to Communications

Upcoming communications

Here you can add, edit and manage all of your upcoming communications.

Filter communication type: EMAIL SMS LETTER

Date from: [] Date to: []

Search upcoming communications

Search notification by title here

TITLE	TYPE	ESTIMATED COST	CREATED BY	SEND DATE	ACTIONS
Geog trip	EMAIL	-	Georgie Broughton	08/11/2022 - 00:00	<ul style="list-style-type: none">View summaryEdit notificationDelete notification

First Previous 1 Next Last

- You can **refine the list** of displayed communications by selecting **Show filter** and amending the search parameters. The **Filter communication type** box is pre-populated with **Email, SMS** and **Letter**. To **remove** any of these communication types from the search, click on the box and then click **back space**
- Enter dates in the **Date from** and **Date to** boxes to filter between specific dates. Leave these fields **blank** to view **all communication**
- Enter the **name** of a communication in the box underneath **Search upcoming communications** to filter by **communication title**
- To view a **summary** of an upcoming communication, click the **action cog** icon next to any of the listed communications and select **View summary**
- Click **Edit notification** to make changes to the notification name and/or recipients
- Click **Delete notification** to remove it from this list

03 Processed communications

In this area you can **view** any **sent communications**.

- You can **refine the list** of displayed communications by selecting **Show filter** and amending the search parameters. The **Filter communication type** box is prepopulated with **Email, SMS** and **Letter**. To **remove** any of these communication types from the search, click on the box and then click **back space**
- Enter dates in the **Date from** and **Date to** boxes to filter between specific dates. Leave these fields **blank** to view **all communication**
- Enter the **name** of a communication in the box underneath **Search communications** to filter by **communication title**

- Click **Hide filter** to minimise the filter box
- Click the **action cog** icon next to any listed communications and then **View targets** to see all users who have been sent communication for that title. You can also **view the content** that was sent or **print**, in the case of a **letter**
- The green tick **Success** icon indicates that the communication has been sent successfully

04 Failed communications

Here you can view and resend any **failed communication**, filtering as above if required.

05 Create template

Select **Create template** to speed up the process if you frequently send communications that follow a **similar format**.

- You can set up templates for **emails, SMS and/or letters** by selecting one or more of these options and clicking **Create**
- Enter the template **name** and click **next**
- **Create your template**, according to the delivery method chosen. Then click **Next**
- You can now **Click to preview**, return to the **previous** screen to **edit** your template, or click **Save to proceed**
- Once you have clicked **Save**, you will see the green **Success** tick. This template will now appear in the **dropdown menu** next time you go to **Create communication**

The screenshot displays the 'Create template' workflow in the Squid system. At the top, the navigation bar includes 'Home', 'Offers', 'Bookings', 'Comms', 'Sales', 'Users', 'CCVs', 'System Admins', 'My account', and 'Log out'. The user is identified as 'School Administrator' for 'The Acorns School - ID: 12345'. A notification states 'You are logged in as the super administrator'. The progress bar shows three steps: 'Template info', 'Email template', and 'Review template', with the third step being the current active stage. Under 'Delivery method:', three options are presented: 'Email' (selected, marked with a green checkmark), 'SMS', and 'Letter'. Below these options, there are three preview buttons: 'Click to preview email' (active), 'No SMS to preview', and 'No letter to preview'. At the bottom, there are 'Previous' and 'Save' buttons.

06 Manage templates

Here you can **add a new template** or **review** and **edit** your existing ones.

- Click on **Add new template** to create a new template
- Click on **Show filter** to search by template name
- Click on the **template name** to if you want to **rename** it
- Click on the **See more** arrow to show the **action cog**, where you can **Preview, Delete or Edit template**
- From here, you can also **Add delivery method to this template** by clicking on the appropriate orange box, and follow the steps to create this. For instance, you can opt to add a letter or SMS to a template that was previously created as an email only

The screenshot shows the sQuid web application interface for managing communication templates. The top navigation bar includes links for Home, Offers, Bookings, Comms, Sales, Users, CCVs, System Admins, My account, and Log out. The user is logged in as the super administrator for The Acorns School. The main content area is titled 'Communication templates' and includes a table of existing templates. A context menu is open over the first template, showing options to Preview, Delete, or Edit the template. Below the table, there are three orange buttons to add delivery methods: Letter, SMS, and Email.

TEMPLATE NAME	DELIVERY TYPES	SEE MORE
Email template Click to here rename template	<input checked="" type="checkbox"/> Email <input type="checkbox"/> SMS <input type="checkbox"/> Letter	⤴
EMAIL Date created: 11/07/2022 @ 12:09PM Last modified: 11/07/2022 @ 12:09PM		
Letter Add delivery method to this template		Preview template
SMS Add delivery method to this template		Delete
		Edit template
New Offer Available Click to here rename template	<input type="checkbox"/> Email <input checked="" type="checkbox"/> SMS <input type="checkbox"/> Letter	⤵
sQuid Template Click to here rename template	<input checked="" type="checkbox"/> Email <input type="checkbox"/> SMS <input type="checkbox"/> Letter	⤵
test Click to here rename template	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> SMS <input checked="" type="checkbox"/> Letter	⤵

07 Other ways of adding communications

Communications can be added to an offer or booking **at the point of creating the offer or booking**, or there are opportunities to add communications at **various later stages**, by clicking on the **action cog** for the relevant offer or booking.

Please refer to the Offers and Bookings sections of the sQuid Trips & Offers User Guide for further information.