SignalVine

v3.0 User Guide

April 2016

Overview

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3 - Viewing/Responding to Messages (Participant Profile)

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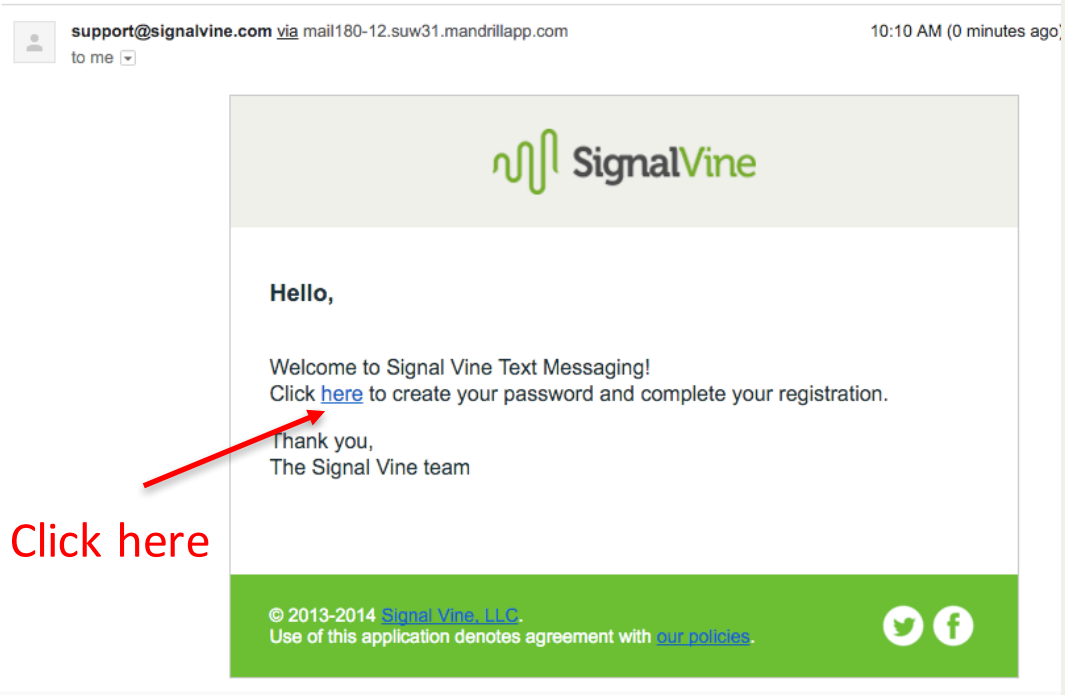
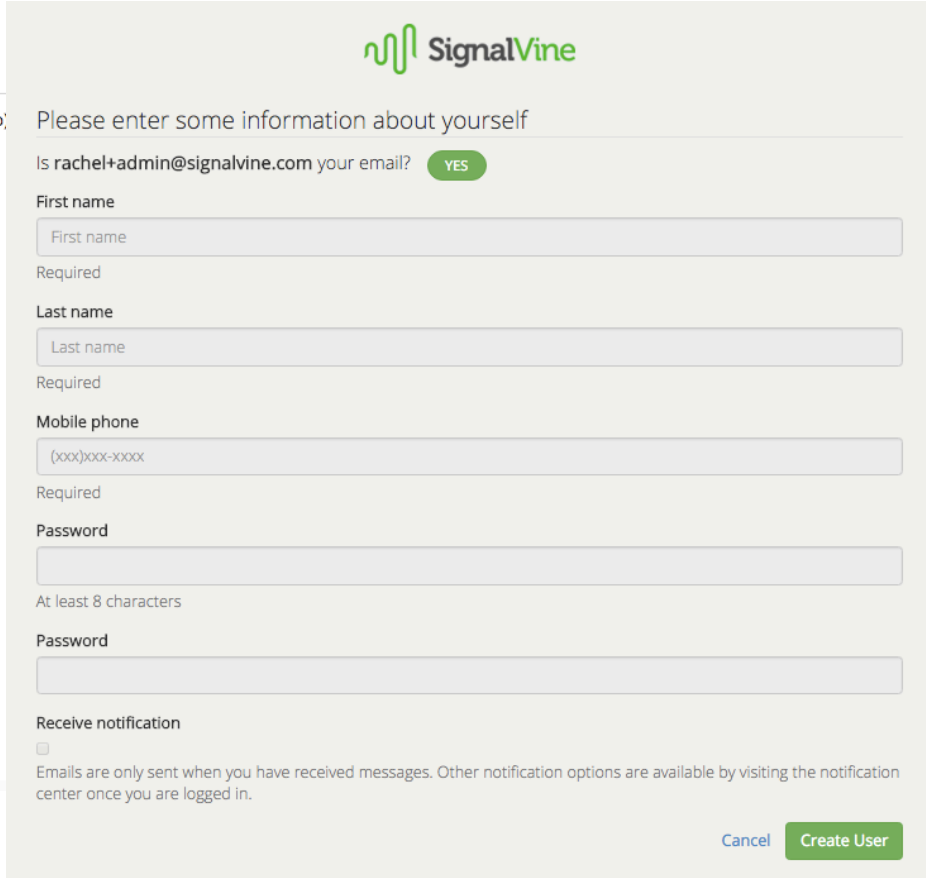
8 - Tools

Create Your Account

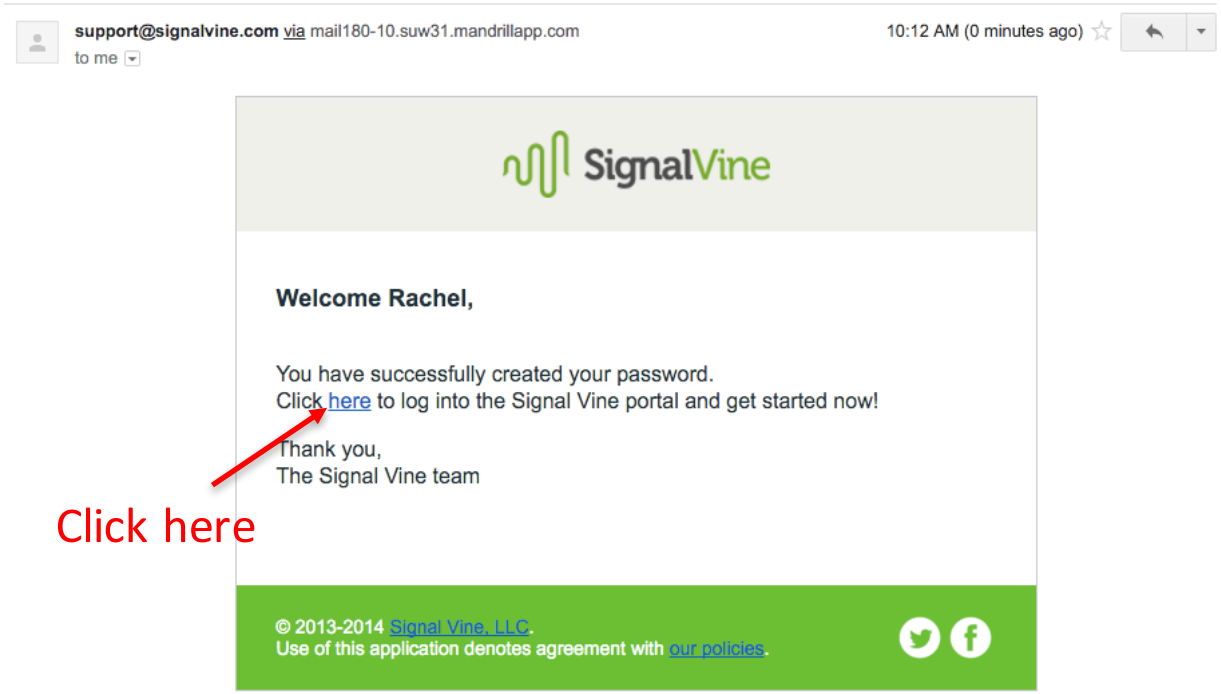
You will receive an email from support@signalvine.com with a link to set up your password. Click on the link to be redirected to a page where you will create your user login.





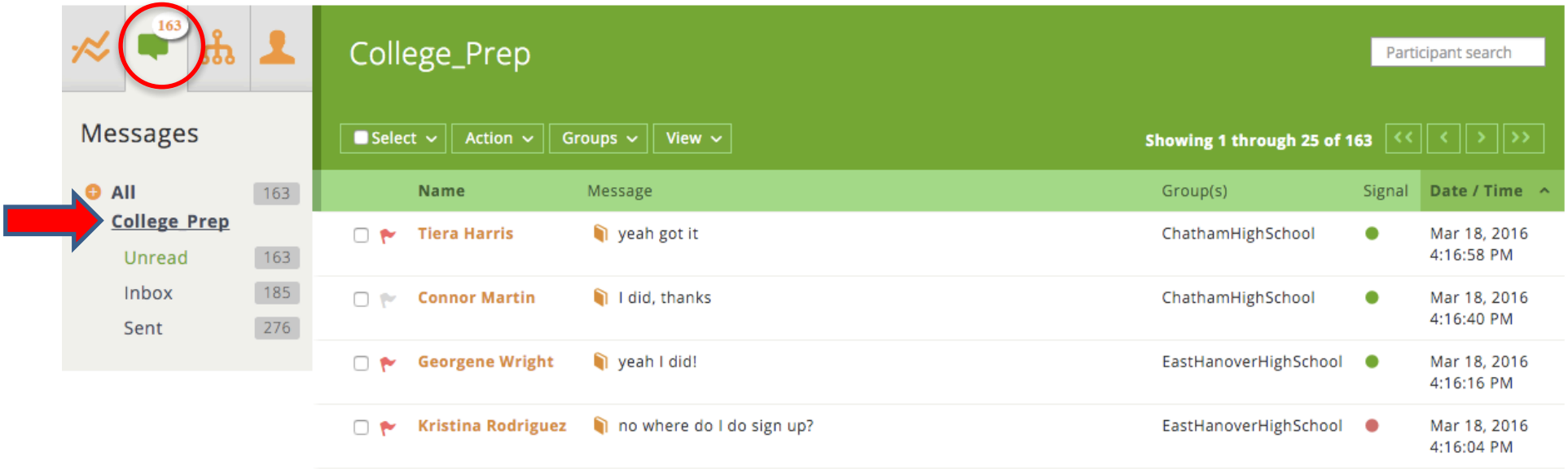
Sign In

Once you create your user and set your password, you will receive another email with a link to the Signal Vine login page (or you can go to: https://v3.signalvine.com/auth/login). Once you are on the login page, type in your email address, your newly created password, and click **SIGN IN**.



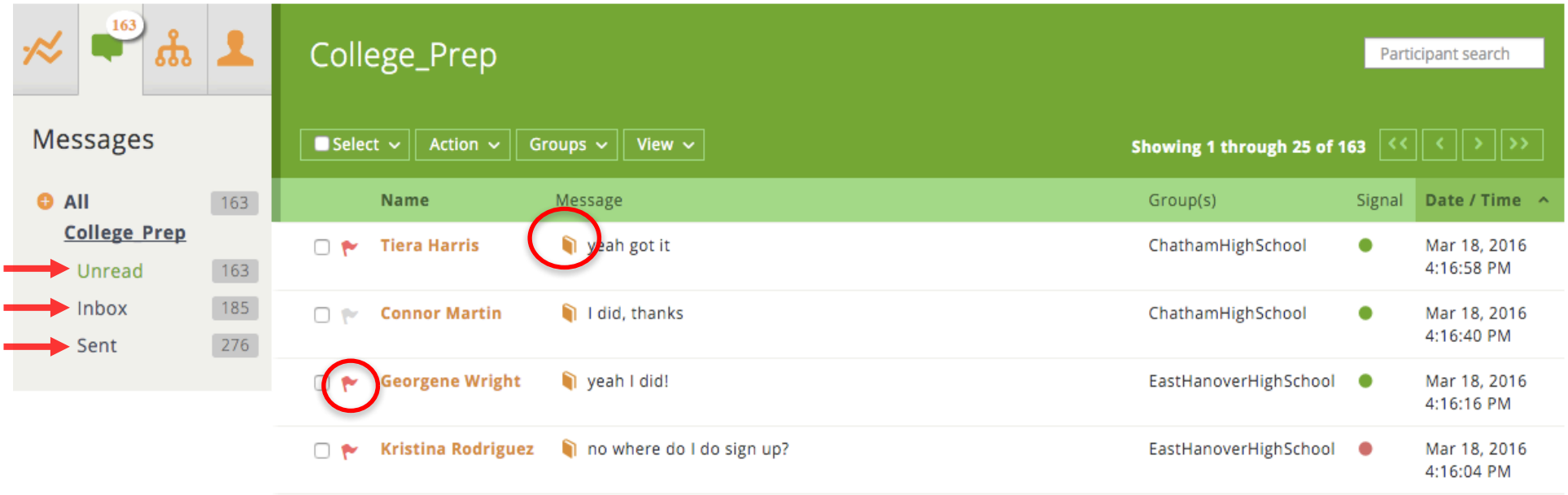
Messages Tab

Once you sign in, you will be brought to your unread messages inbox. Click on your **PROGRAM NAME** and from here, you can see your unread messages, your entire inbox, and your sent messages (both program and counselor sent).



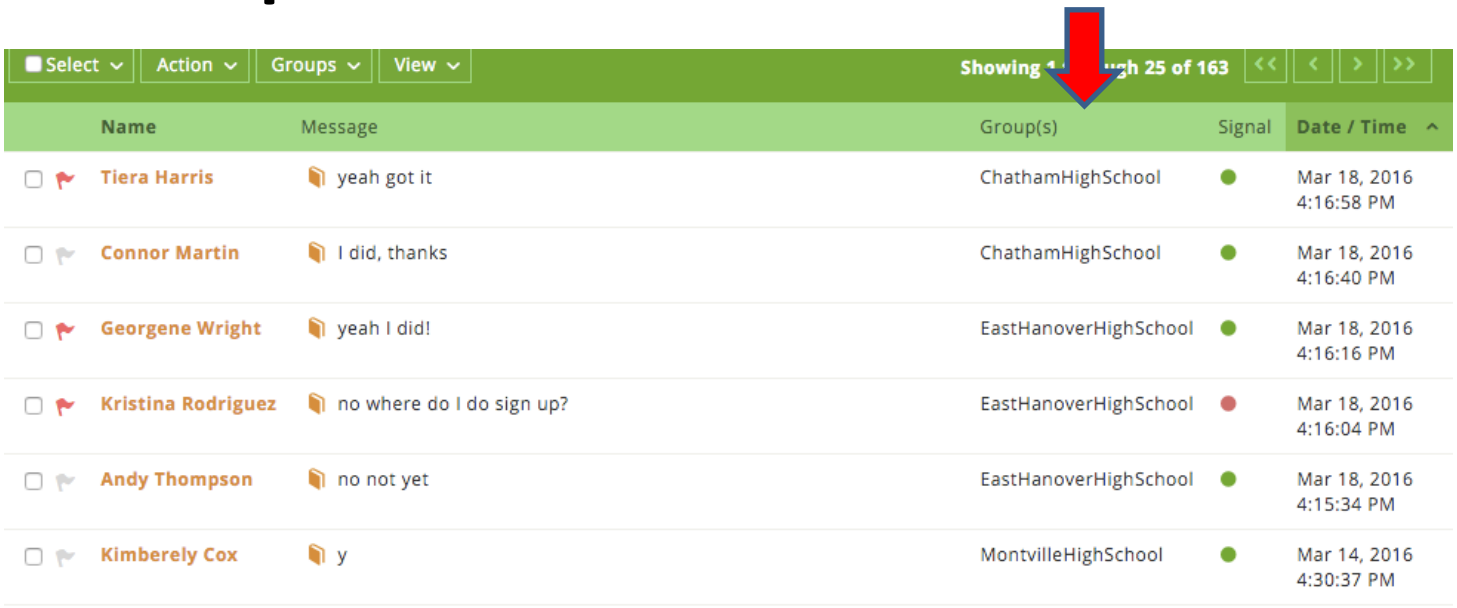
Inbox

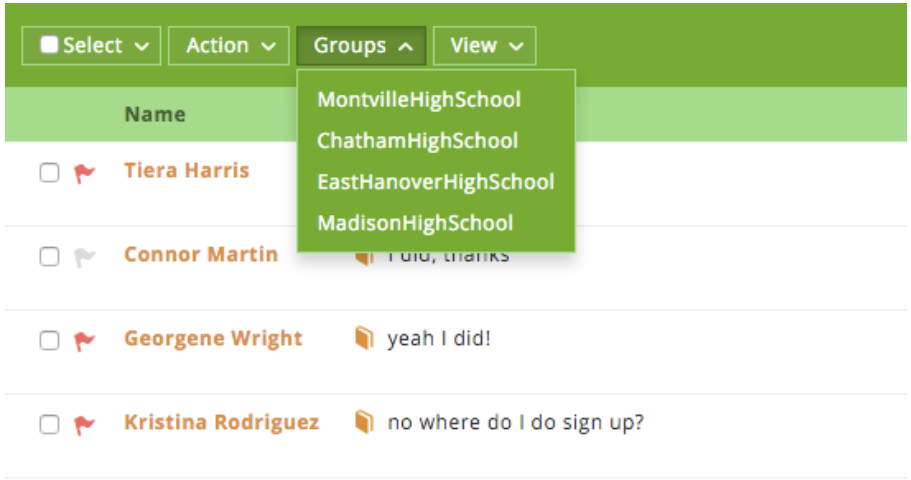
As there is no delete button in Signal Vine, you will be marking messages as **READ**, by clicking on the book icon, moving messages from the **Unread** inbox to your general **Inbox.** You can also **FLAG** message for future follow-up by clicking on the flag icon. From this screen you can also access all of your **SENT** messages.



Inbox Group Column and Filter

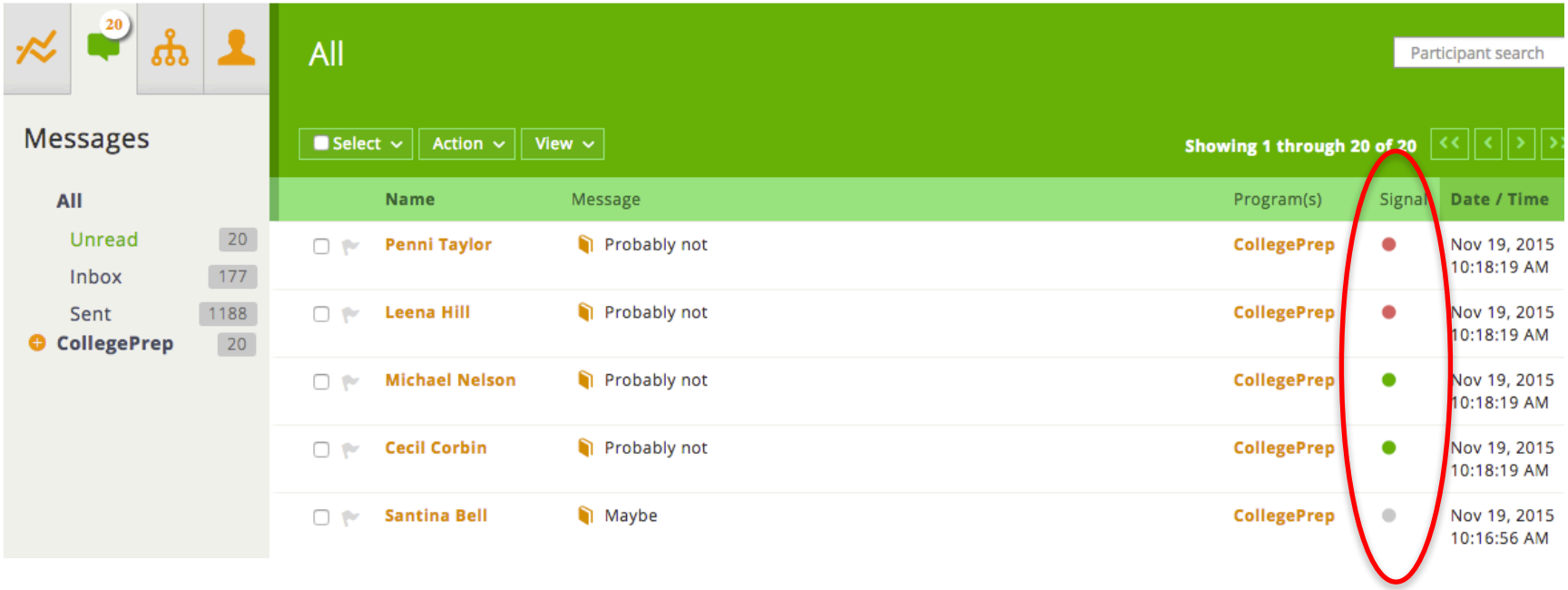
Within the programs tab view, you can also clearly identify the which group each participant belongs to.





You can also view participants by their individual groups by using the **GROUPS** drop-down menu.

Response Management

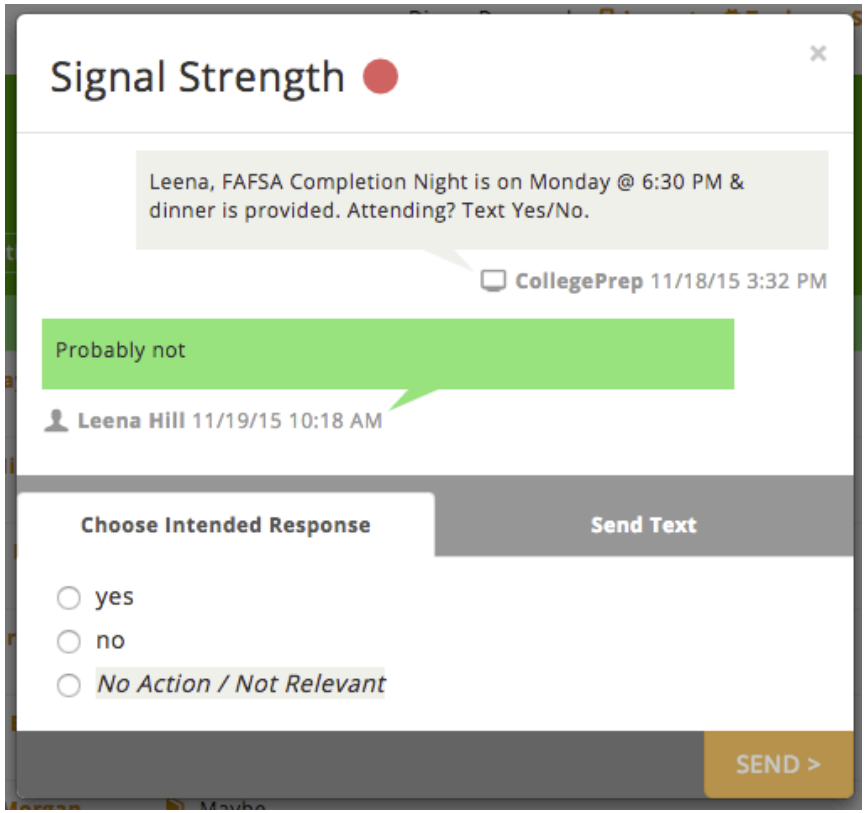


Our response management feature has the ability to test the *Signal Strength* of a participant's response. You'll see a **SIGNAL COLUMN** in the inbox with **red**, **green**, and **gray** bubbles. The **red** bubbles mean that the system did not understand the response, the **green** bubbles mean that the response was understood, and the **gray** bubbles mean that the system was not looking for a particular response.

Response Management

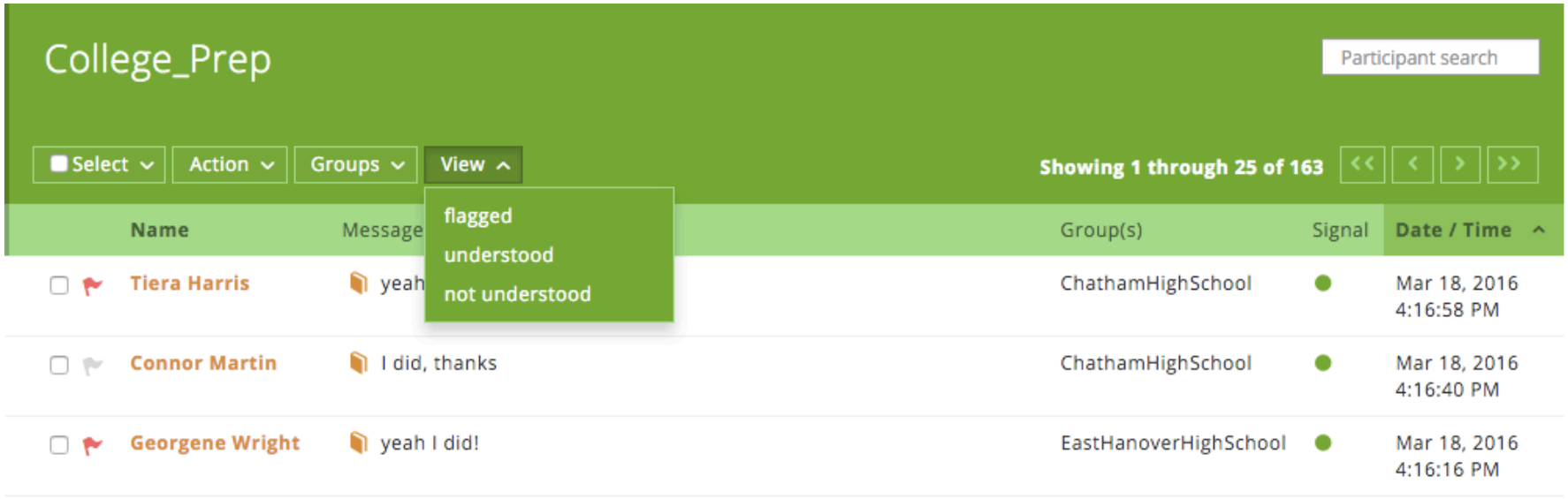
From the inbox, you can click on those bubbles to perform corrective actions. For example, if a student responds “Probably not” when you were looking for a yes/no response, you have the ability to click on the **red** bubble and either *Choose Intended Response* or *Send Text* to clarify.

This feature allows participants to get follow up messages without individual users having to manually type the correct response.

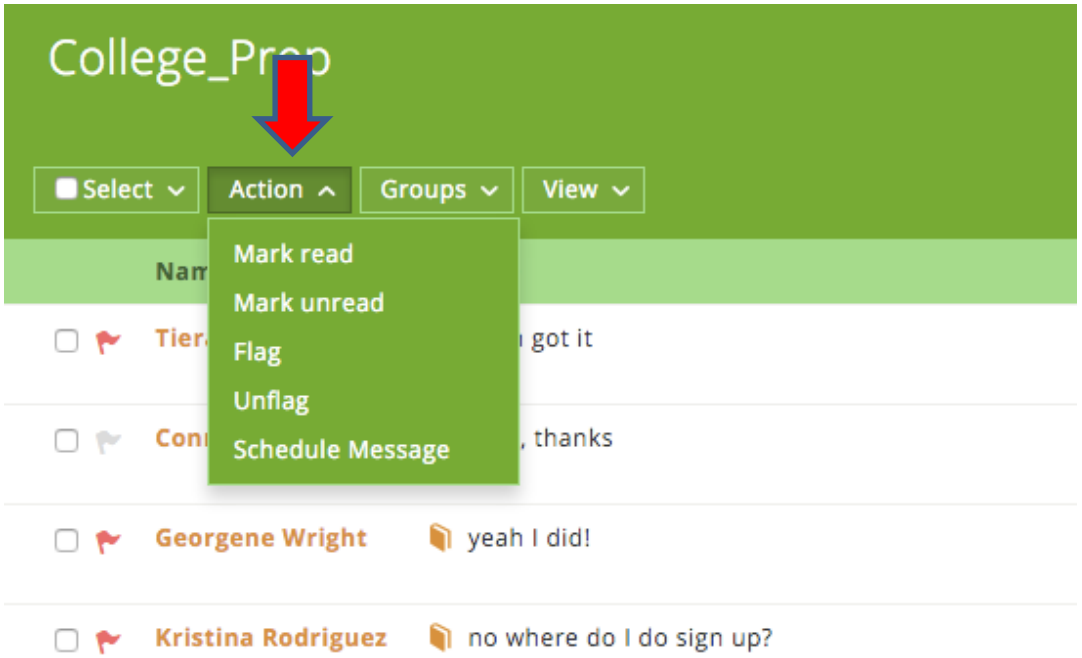


Messages Filters

The **VIEW** drop-down menu that appears above the inbox allows you to see only certain types of messages. When VIEW is clicked, you'll be able to filter the inbox and view messages of three types: that you have flagged for follow up, that the system has understood (that have a **green** signal in the signal strength column), and that the system has not understood (**gray** or **red** signal in the signal strength column).



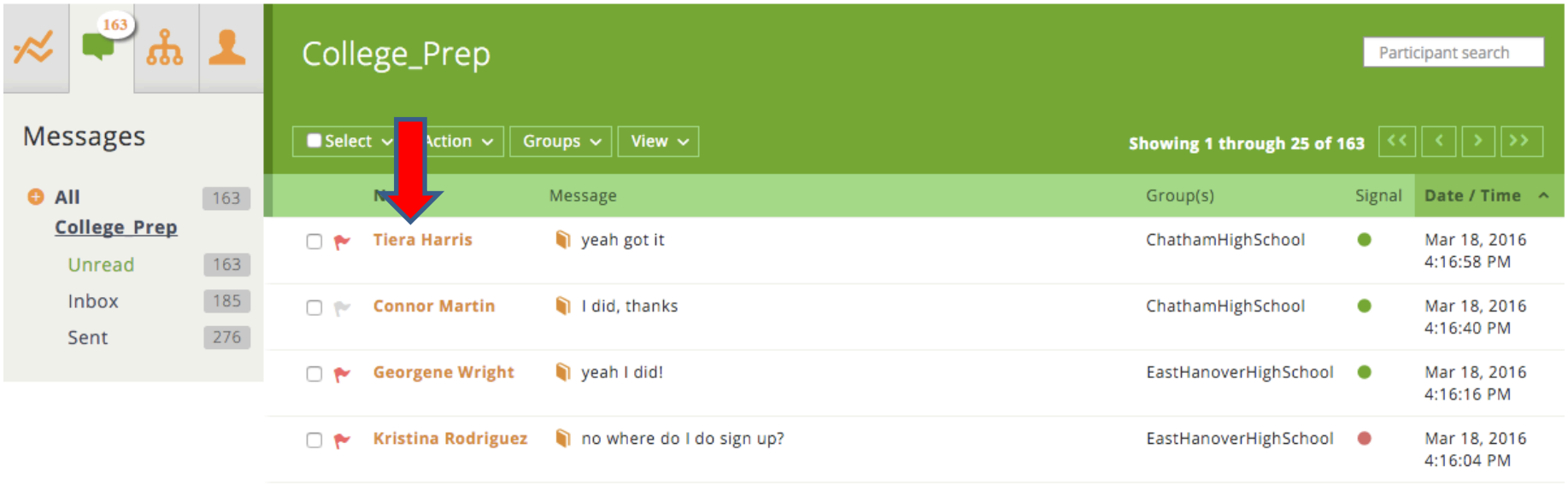
Bulk Actions



Within the **MESSAGES TAB** you can perform bulk actions using the **ACTION** drop-down menu. After selecting the messages you want to perform the action for, you can bulk mark messages as read or unread, bulk flag or unflag messages, or send bulk messages (explained later in detail).

Participant Profiles

To access an individual participant's profile, click on that participant's **NAME** from the inbox.

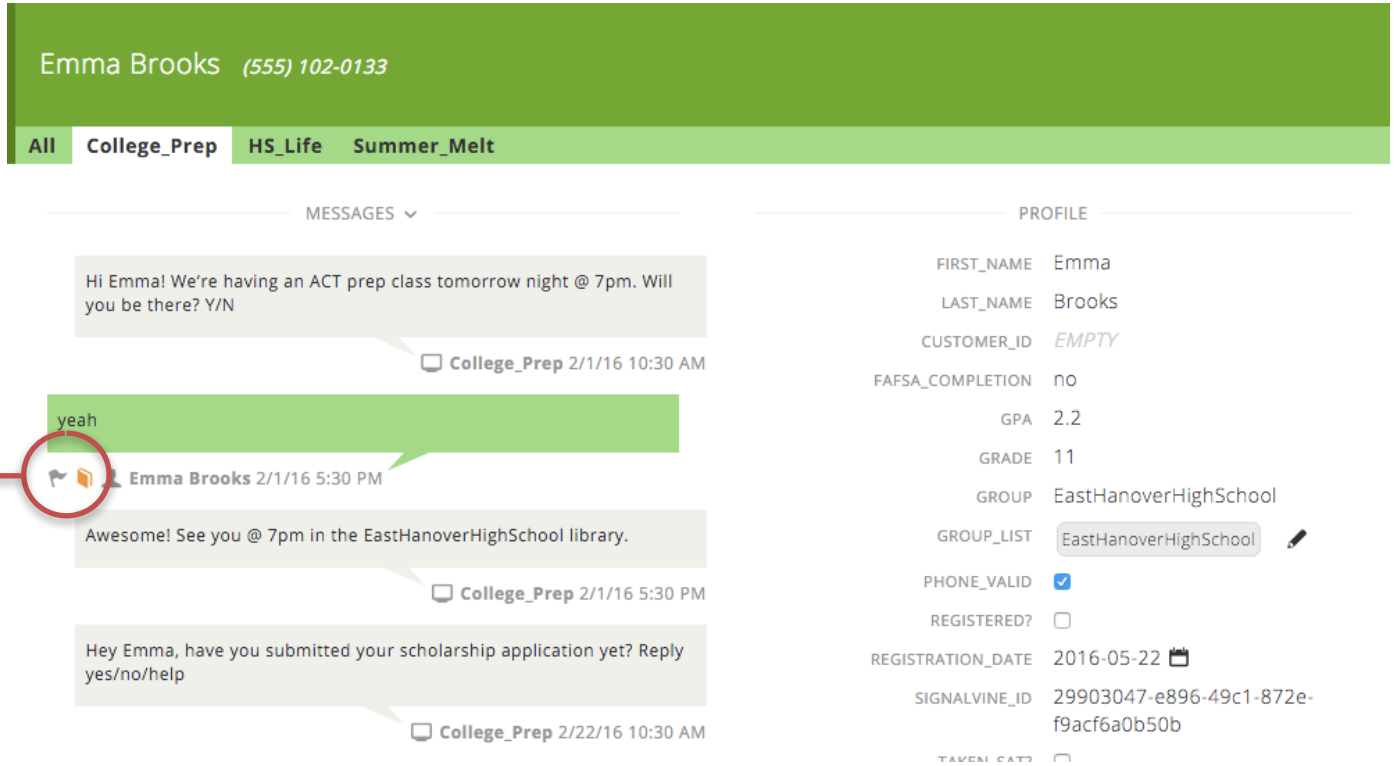


Message Thread

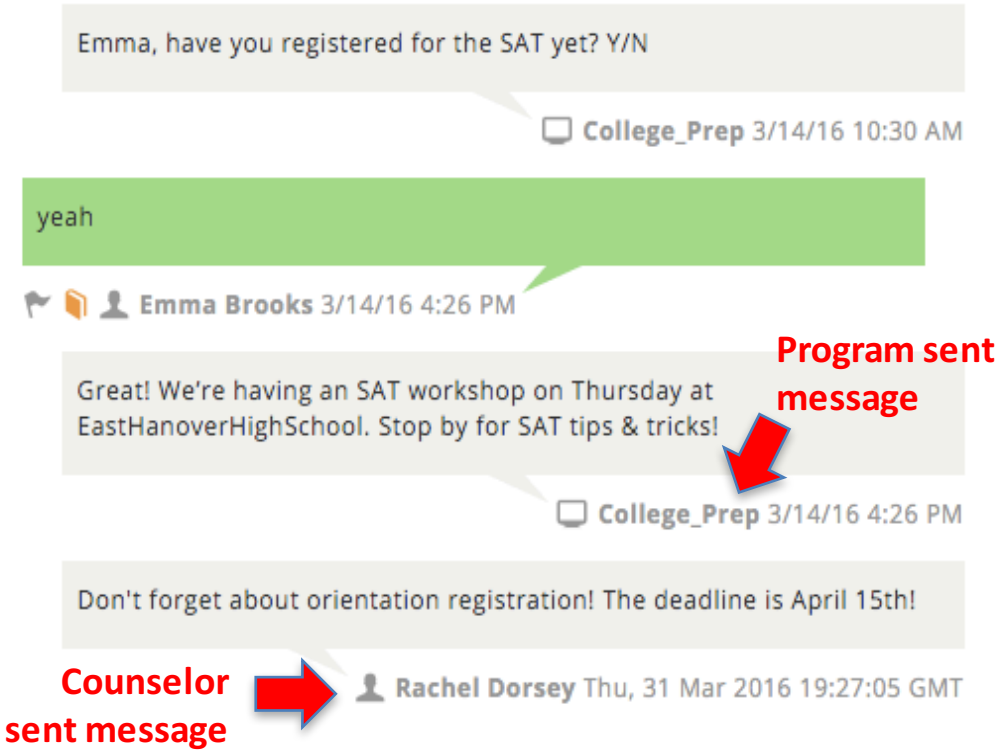
Once you click on a participant's name, you will be brought to this screen and will be able to see all of your message history with that participant, as well as their profile information.

Next to any inbound messages, the same book and flag icons from the inbox view appear.

You can mark messages as read and flag them as you reply by clicking on the book or flag icon directly next to the message in the message thread.



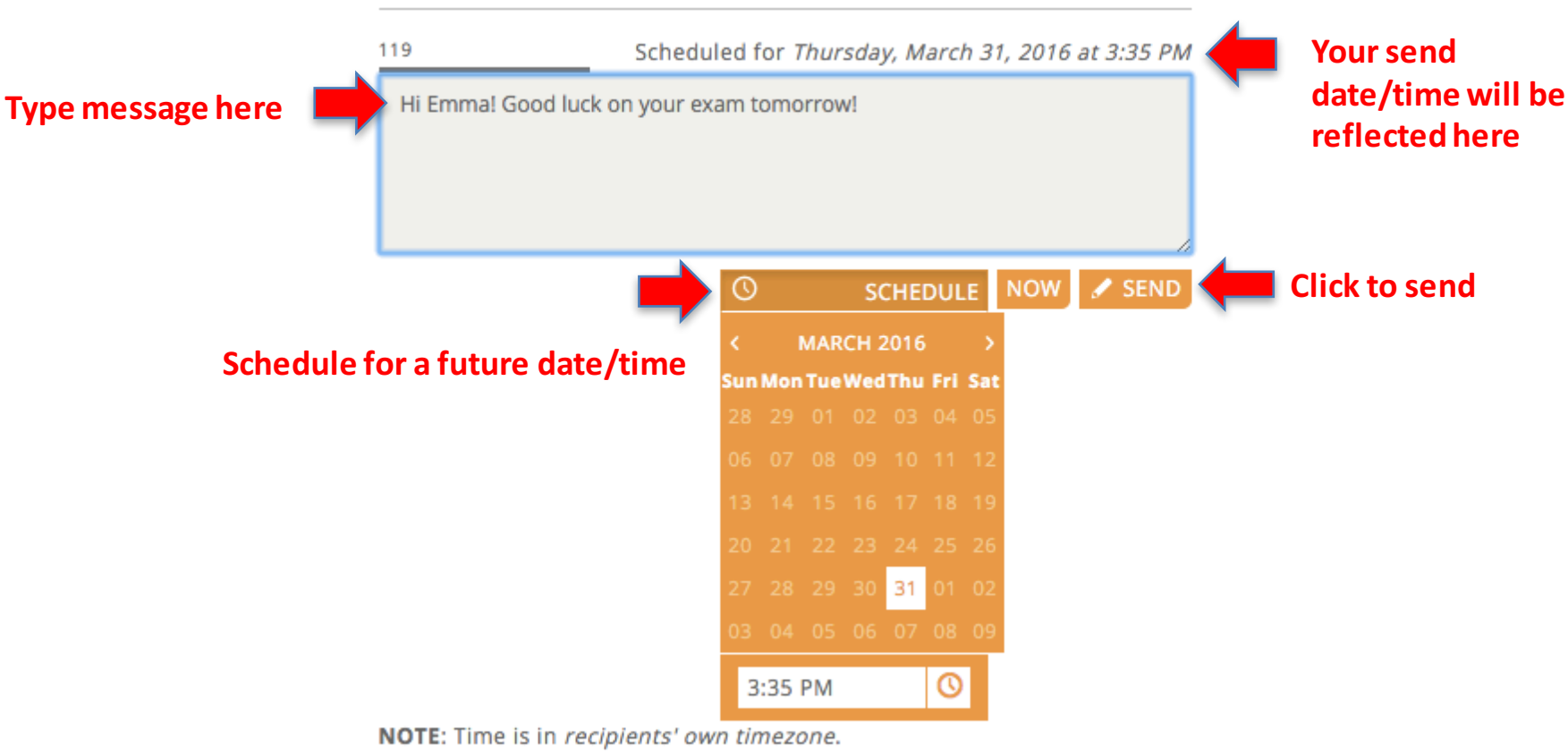
Message Thread



You can clearly see the difference between the messages that have been sent by the participant (in **green**) and the program or counselor sent messages (in **gray**). Within the platform, users can see if messages have been sent by the program or if a counselor has sent the message.

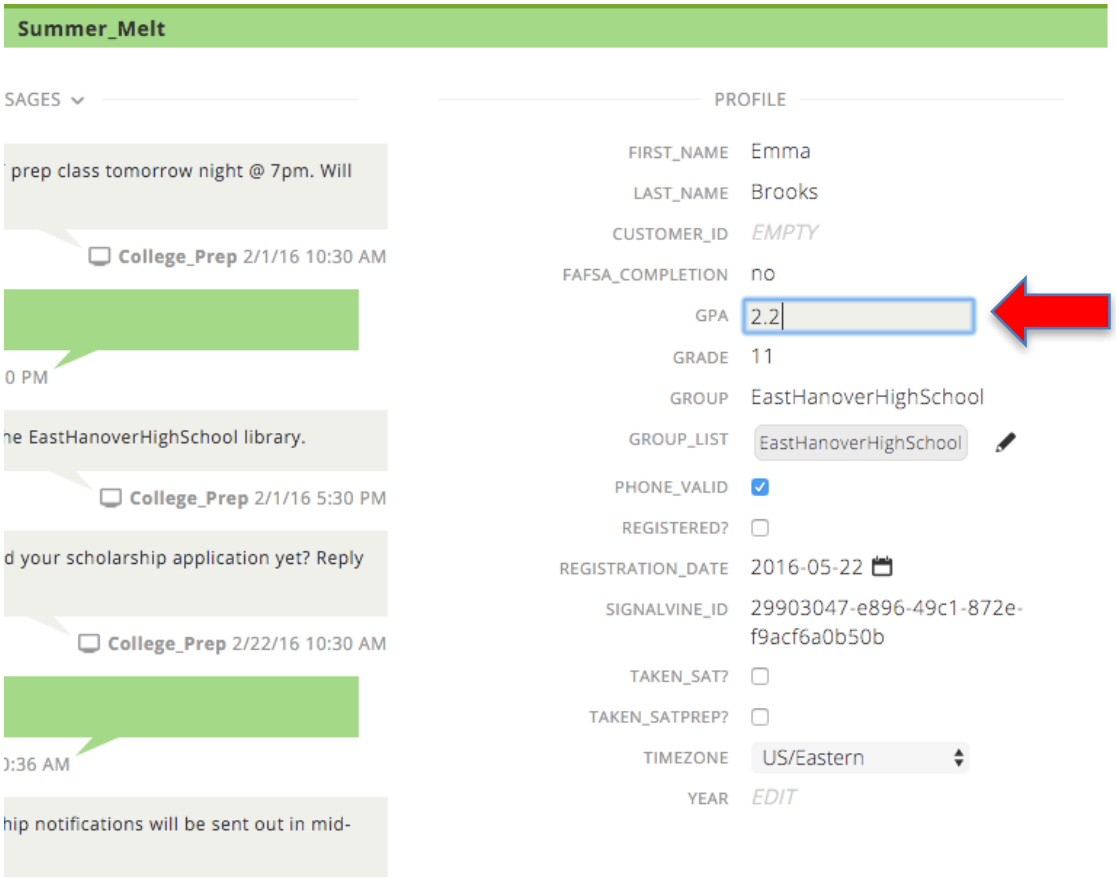
Send Message

At the bottom of the message thread, you can compose a message in the box and either **SCHEDULE** it using the calendar or send it **NOW** and then click **SEND.**



Edit Participant Data

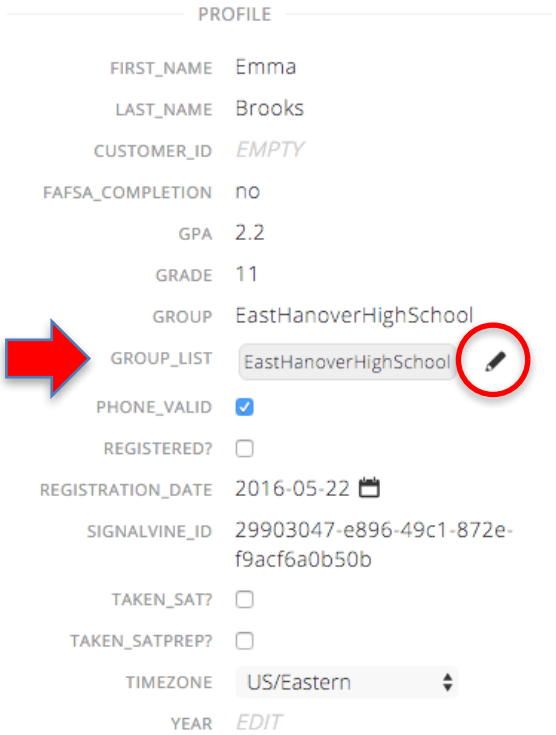
To edit participant data, click in the field you wish to edit, type your changes, and hit **ENTER** to save.

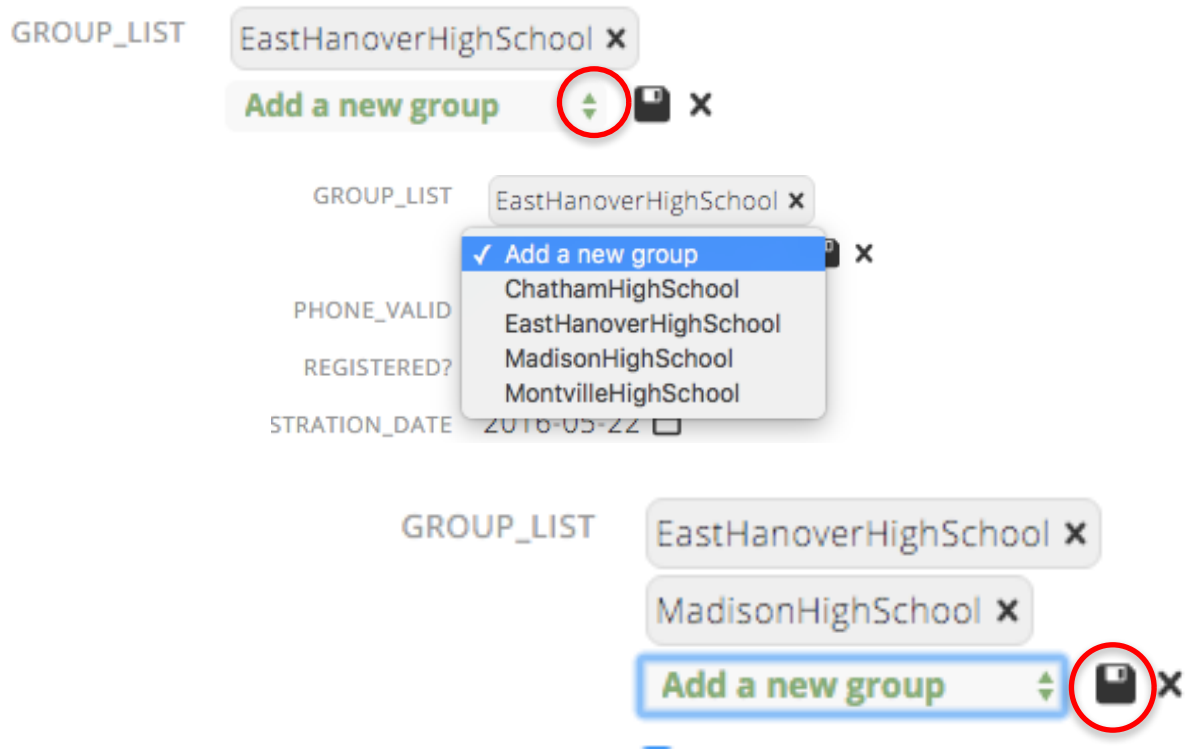


Click field to edit & hit ENTER to save

Group Modification

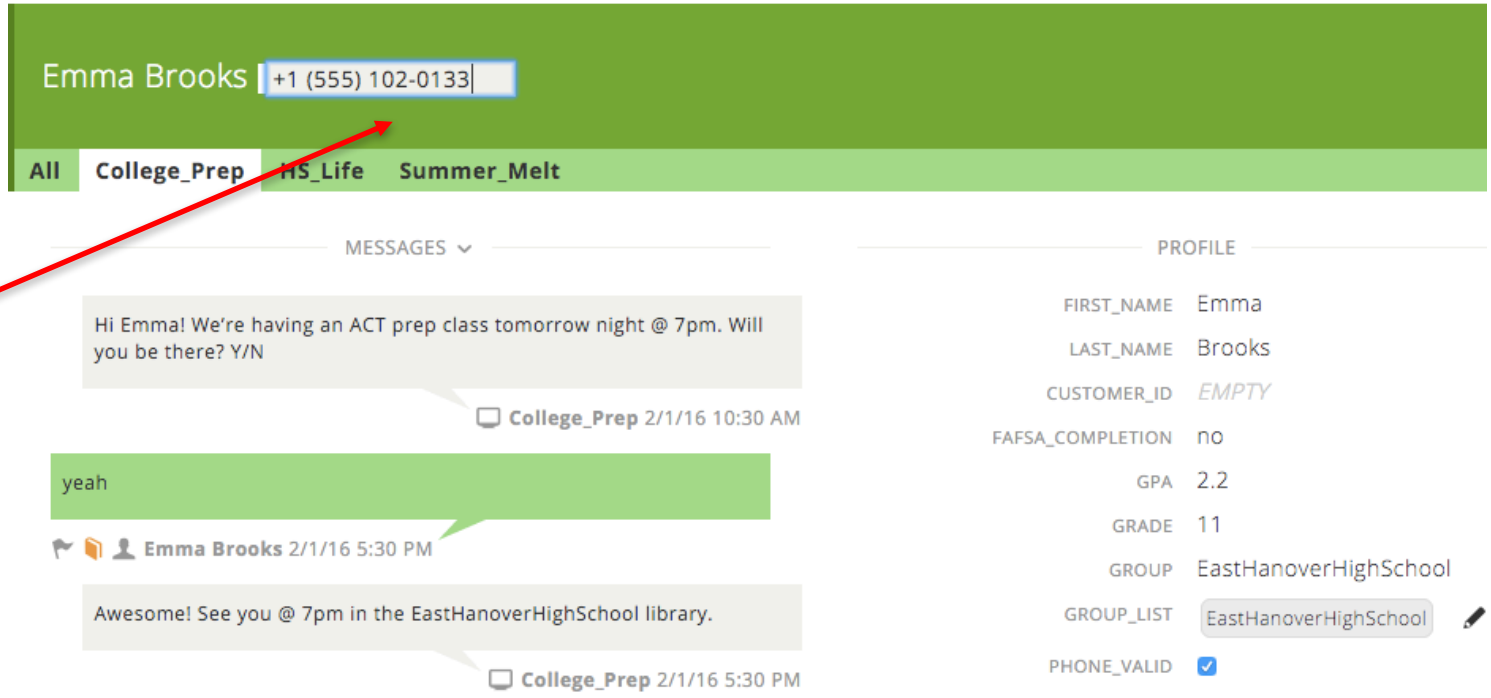
Within a participant's profile, you are able to edit their **GROUP_LIST**. In order to modify the groups of a participant, click on the green pen next to the group_list field. At this point, a drop-down menu of all available groups will appear. Once you make your modifications, click the floppy disk icon to finalize your changes.





Edit Participant Phone Number

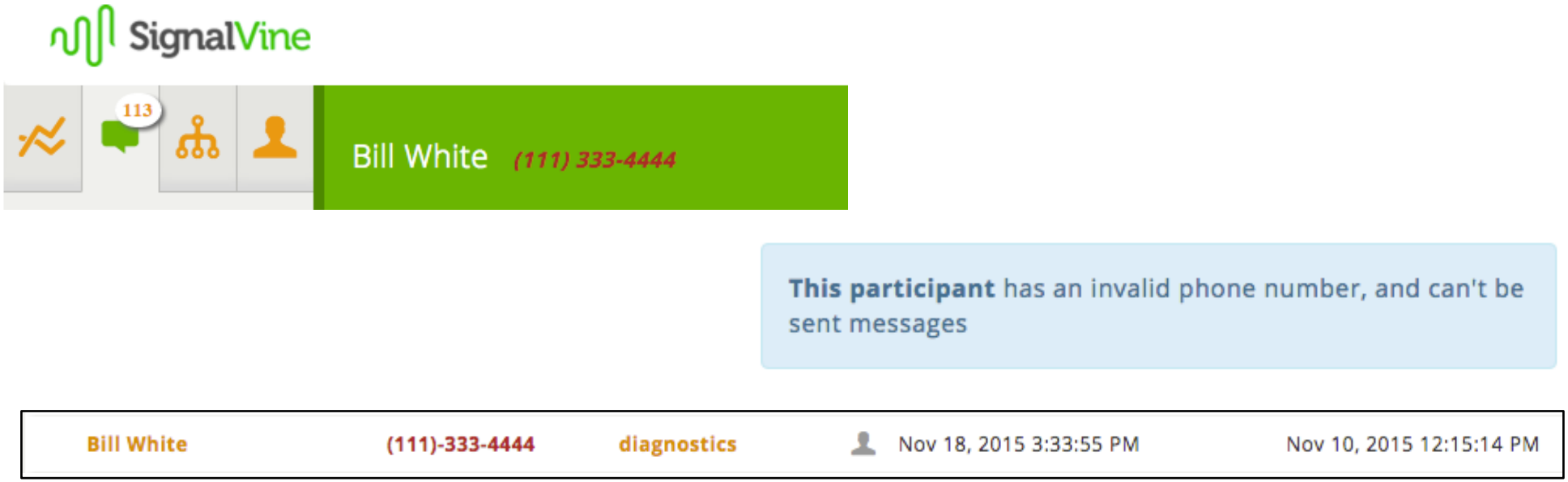
To edit a participant's phone number, click on the phone number at the top of the screen, type in the new number and hit **ENTER**.



Click here to edit

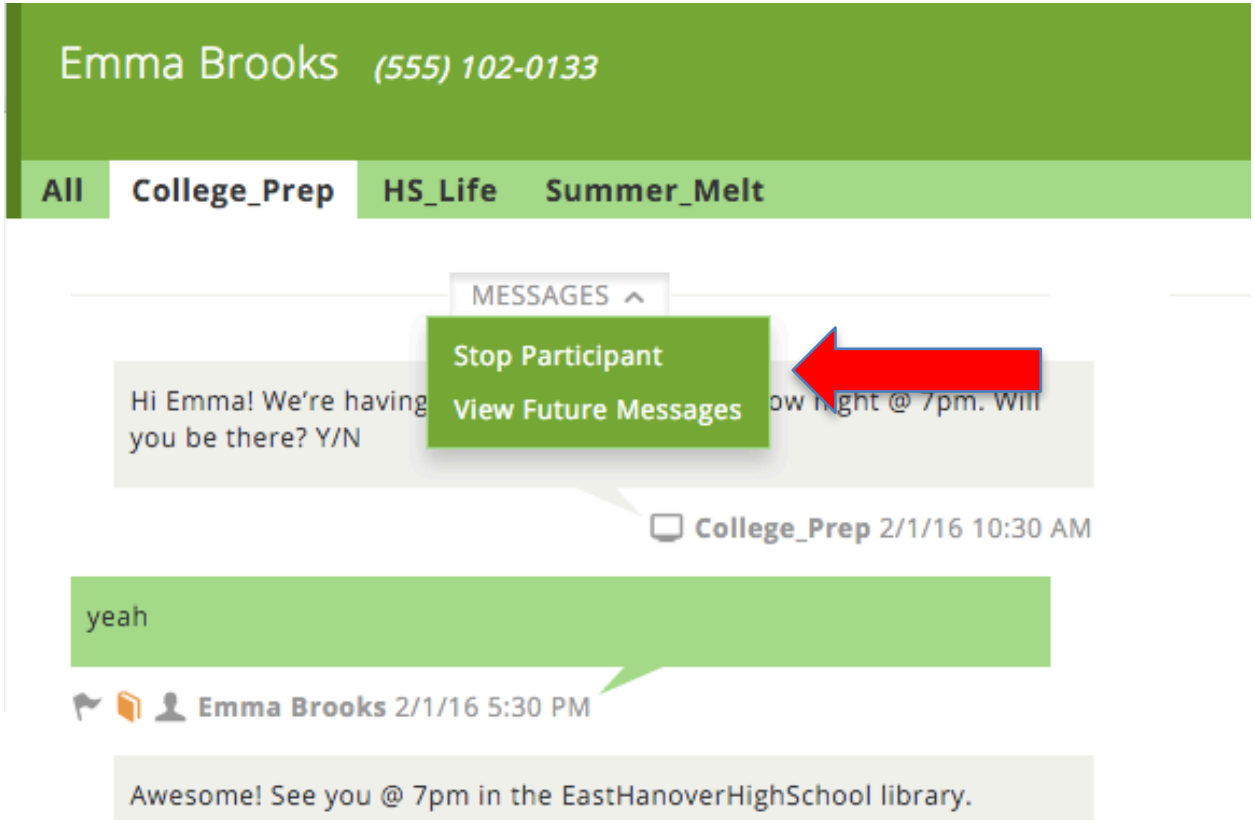
Invalid Participant Phone Display

This feature lets you know which participants have invalid numbers. Once we try to send a message to a phone number that is invalid due to its format, that participant will be stopped and the phone number will turn red in both the profile and the participant list.



Messages Drop-Down Menu

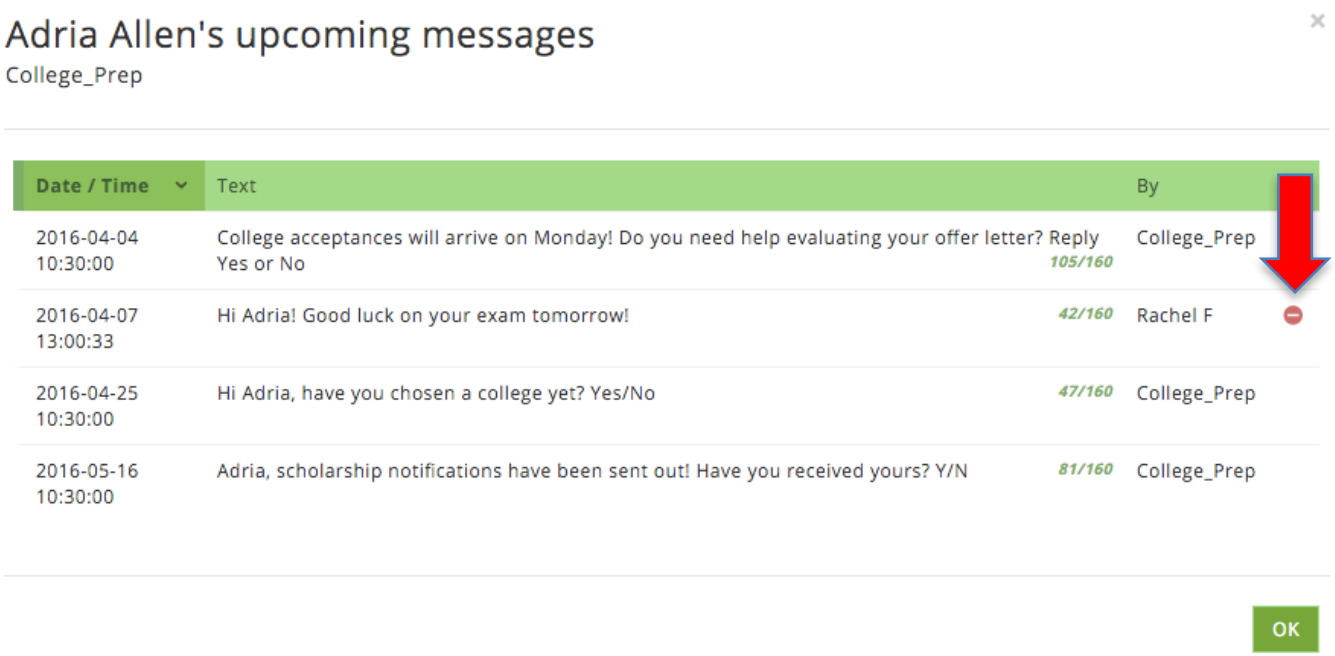
Use the drop down menu to **STOP** a participant from receiving messages, or to **VIEW FUTURE MESSAGES** scheduled for this participant.

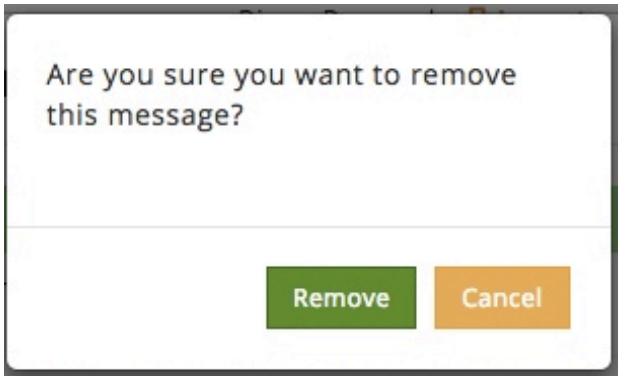


Click **MESSAGES** & choose View Future Messages or Stop Participant

View Future Messages

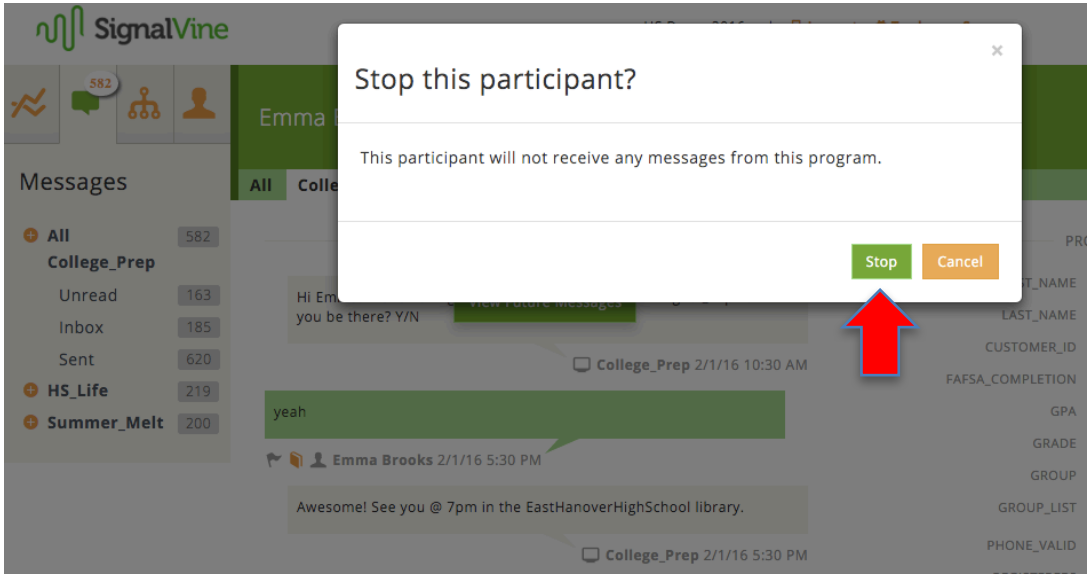
If you choose **View Future Messages** you will see all of the participant's scheduled messages. Future ad-hoc (counselor scheduled) messages will have a red circle to the right of it. Also, if your program admins have enabled this feature, programmed messages will have that icon as well. These messages can be deleted by clicking on that red circle. Click REMOVE to confirm your decision to delete that message for the individual participant.



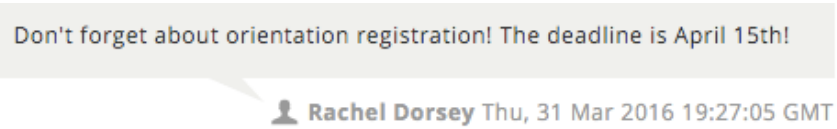


Stop Participant

Back in the **MESSAGES** drop-down menu, if you choose **STOP PARTICIPANT**, you will stop that participant from receiving future messages.

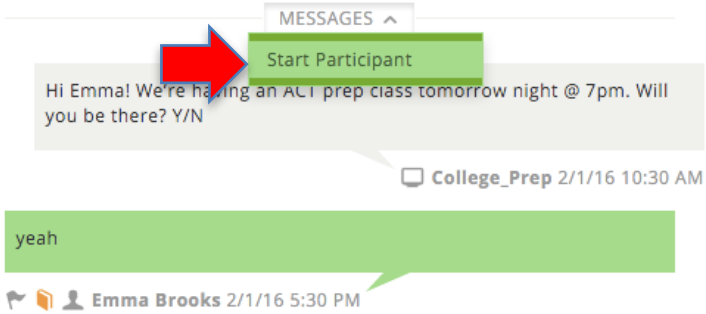


Once a participant is stopped, the messages box at the bottom of their profile will disappear.

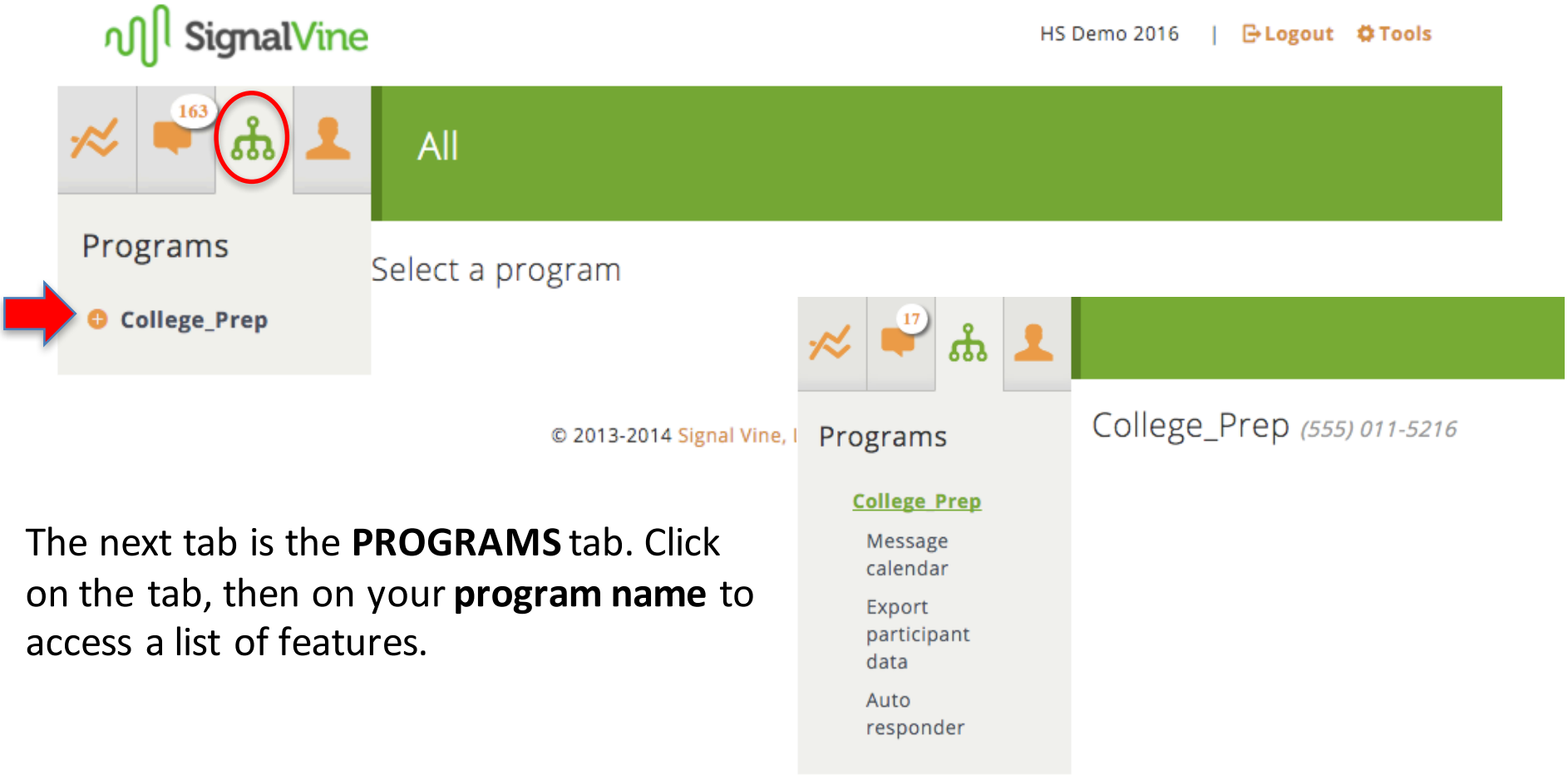


This participant has been stopped and can't be sent messages

If you need to reenroll a participant into receiving messages, choose the **MESSAGES** drop-down menu once again, and you can **START PARTICIPANT.**



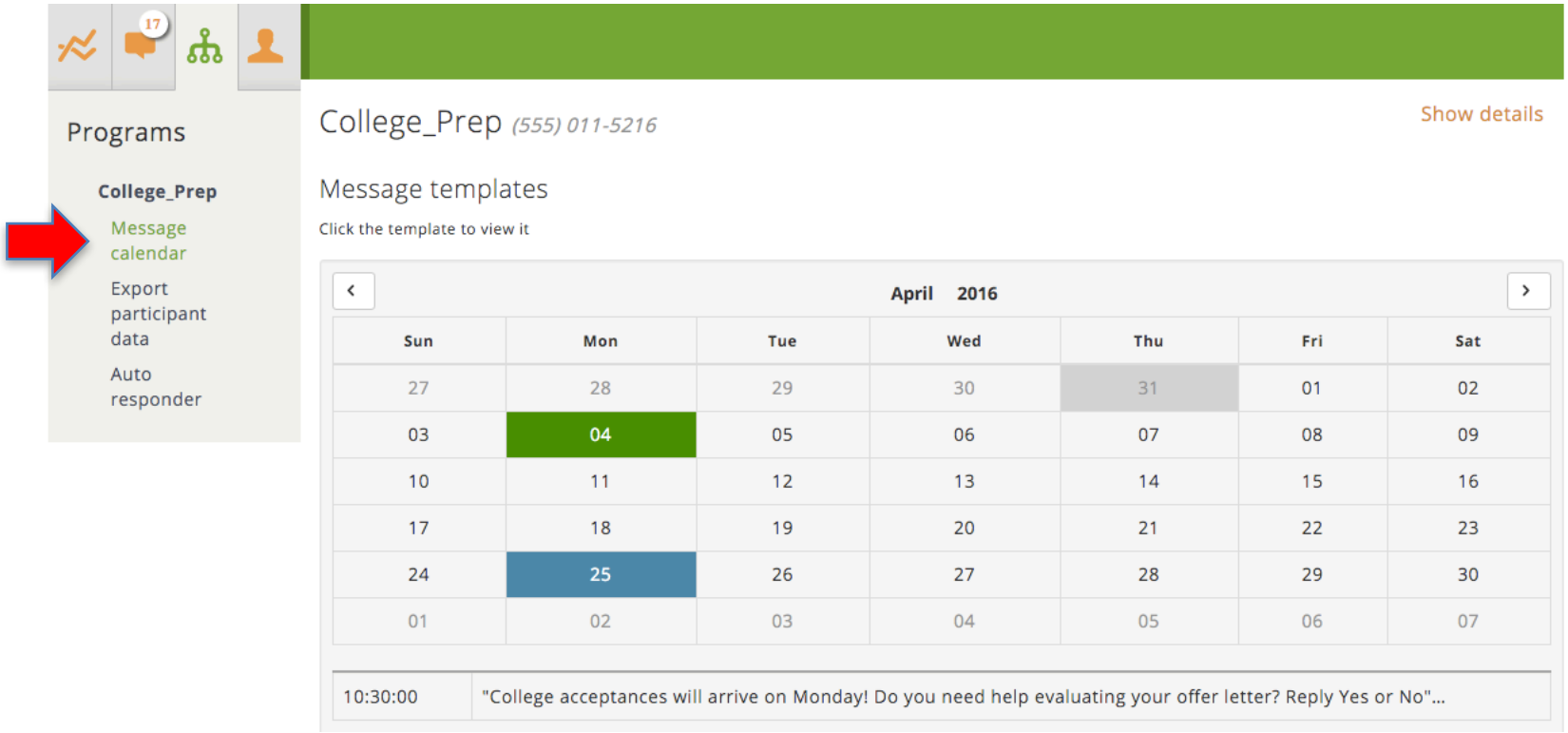
Programs Tab



The next tab is the **PROGRAMS** tab. Click on the tab, then on your **program name** to access a list of features.

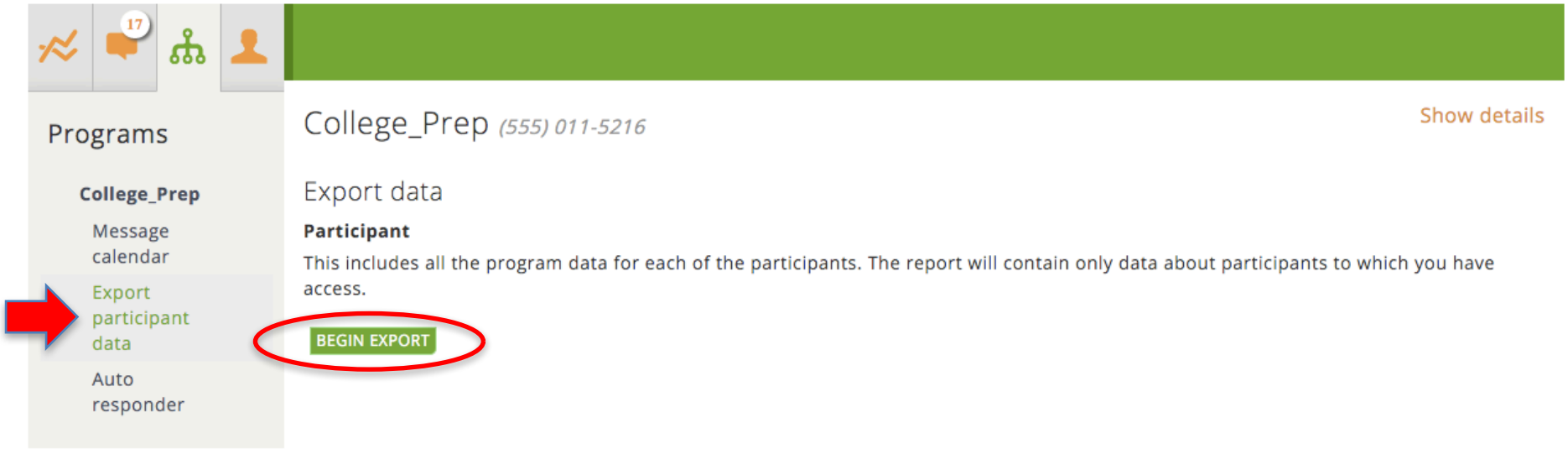
Message Calendar

You can view the future program scheduled messages by clicking on the **MESSAGE CALENDAR**. All of the dates highlighted in blue have a message scheduled to go out on that day. When you click on a blue day, the message text and send time will appear under the calendar.



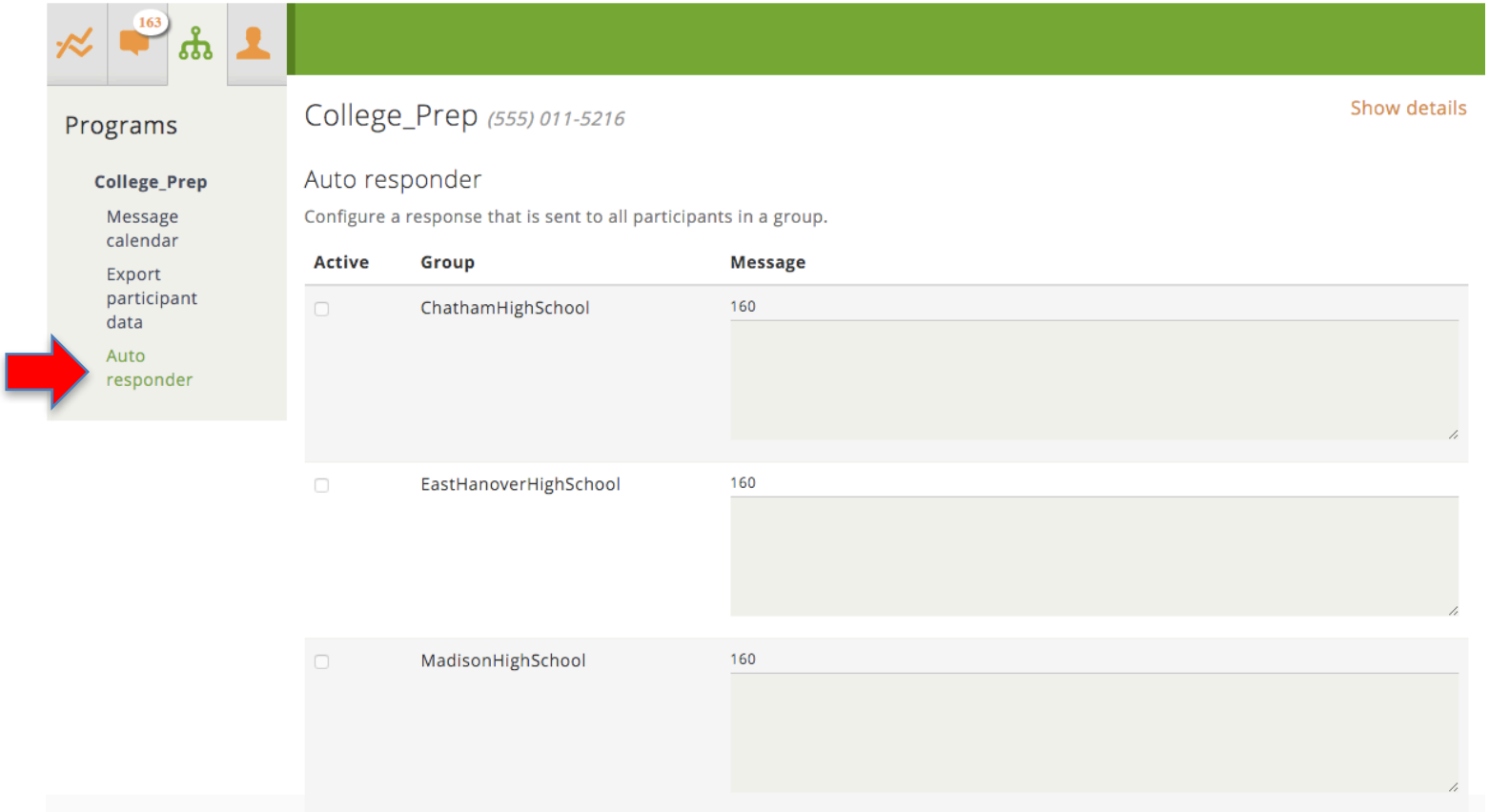
Export Participant Data

You can export participant data by clicking on the **EXPORT PARTICIPANT DATA** option. Then, click BEGIN EXPORT and a link to download a CSV file will be emailed directly to you from support@signalvine.com.

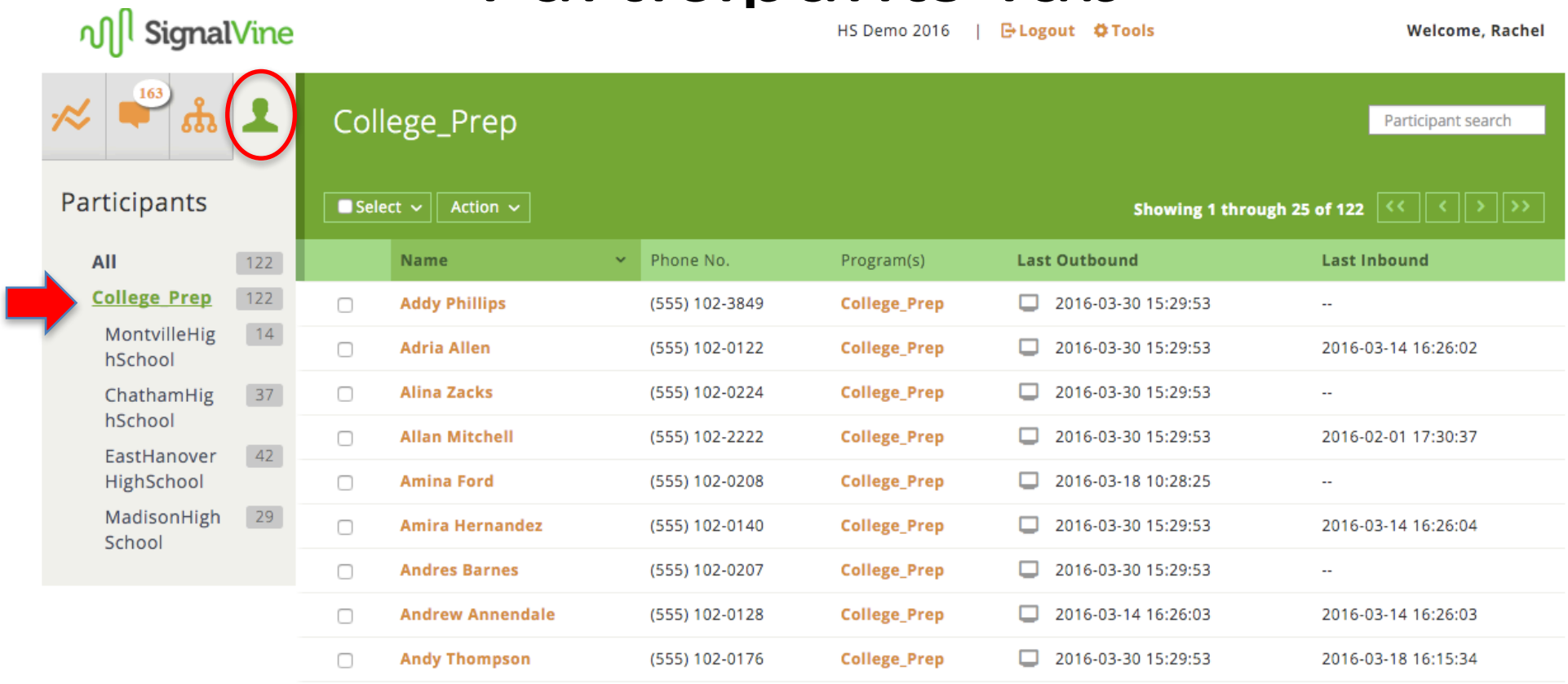


Auto-Responder

The **AUTO RESPONDER** option works very similarly to an email out of office. When this feature is turned on, all participants that text in will receive the message you set here, unless a program message has a scheduled response. To turn this feature on, type your message, check the box next to the group name(s) that you want to receive the away message, then click **SAVE CHANGES**.



Participants Tab

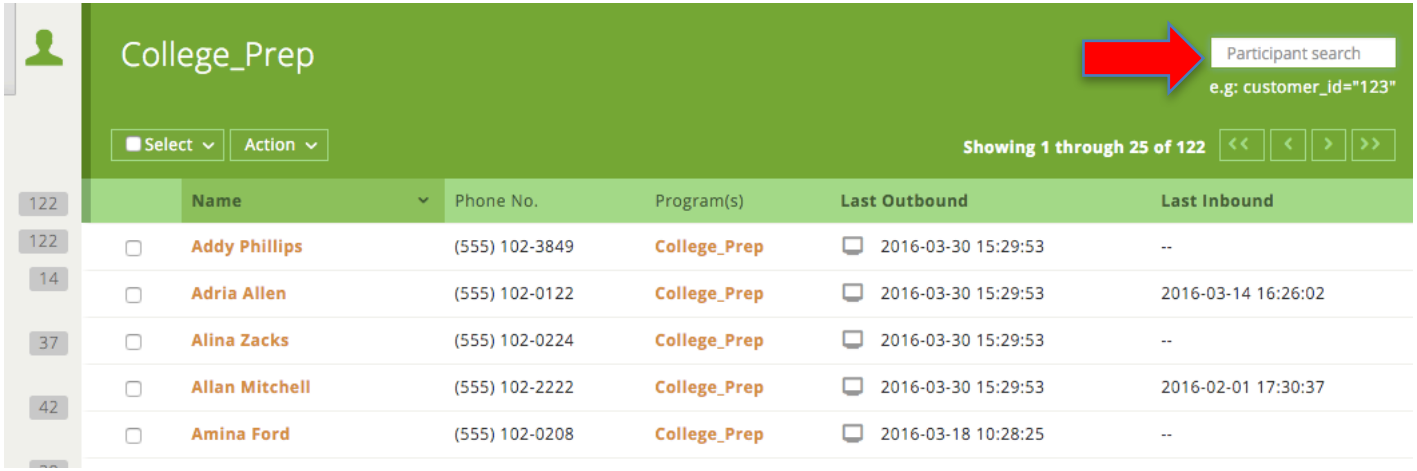


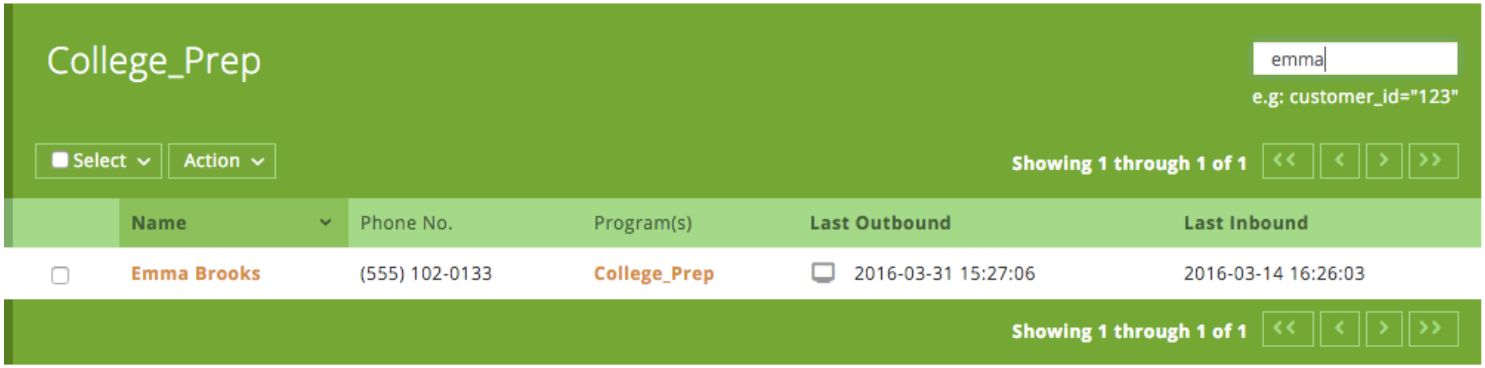
The final tab on the far right is the **PARTICPANTS TAB**. To gain more functionality within this tab, click on your **program name.**

Participant Search

You can search for certain participants using the participant search box. You can search by:

- First Name
- First and Last Name
- Phone Number



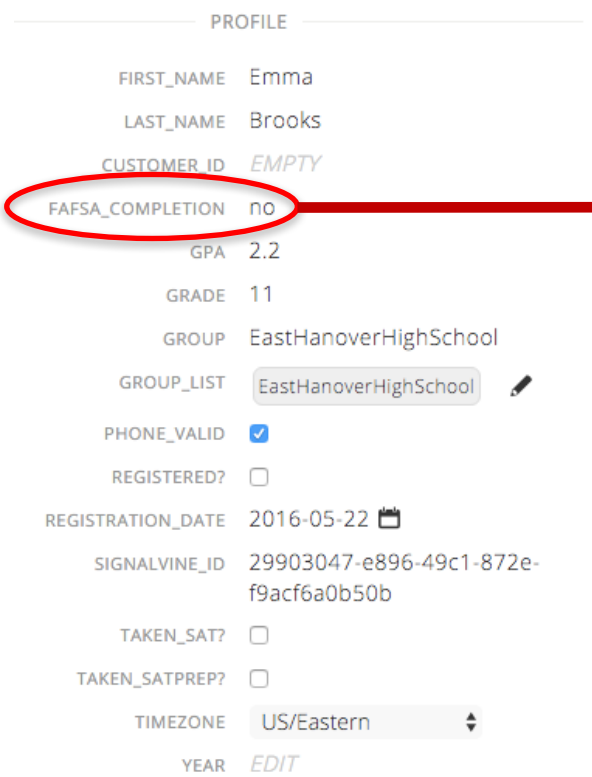


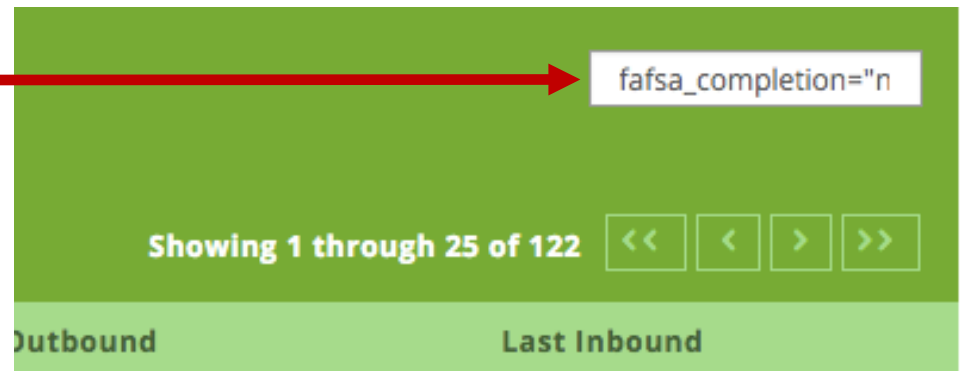
Type one of those three pieces of information into the search box and hit ENTER to receive your results.

Advanced Search v1

In the same search bar, you can filter participants by different variables from the profile. In order to take advantage of this functionality, you must type the variable header, **exactly** as it appears in the **PARTICIPANT PROFILE**, followed by =, and then the value in quotes. For example, if you wanted to search for students who have not ompleted their FAFSA, in the Participant Search box you would type:

fafsa_completion="no"

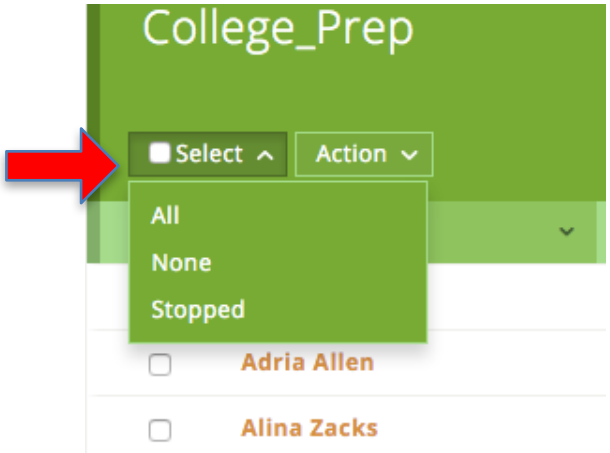


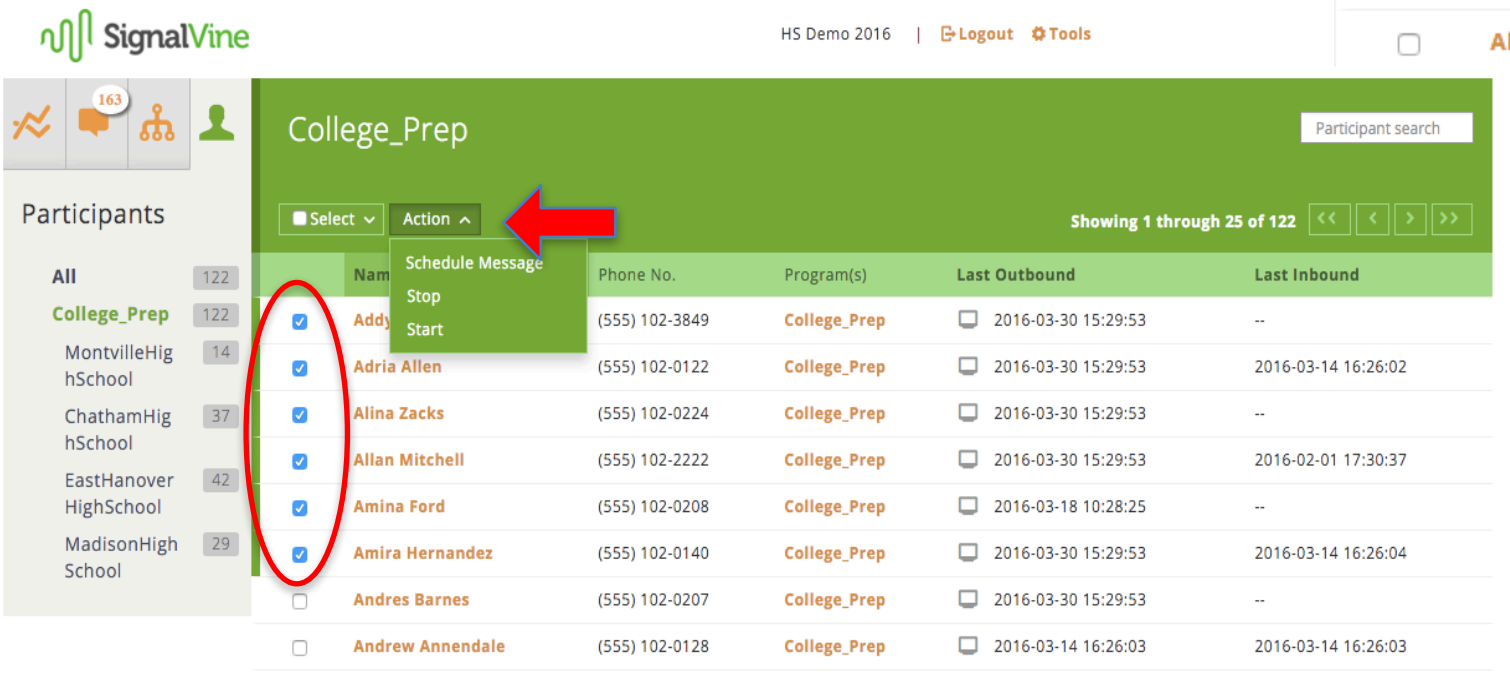


After you hit ENTER, the page will filter to show only students that have the fafsa_completion field populated with the word "no" in their profile.

Participant Bulk Actions

You can select more than one student at a time by either clicking on each participant's box, or using the **SELECT** drop-down menu to select ALL, NO participants, or STOPPED participants.

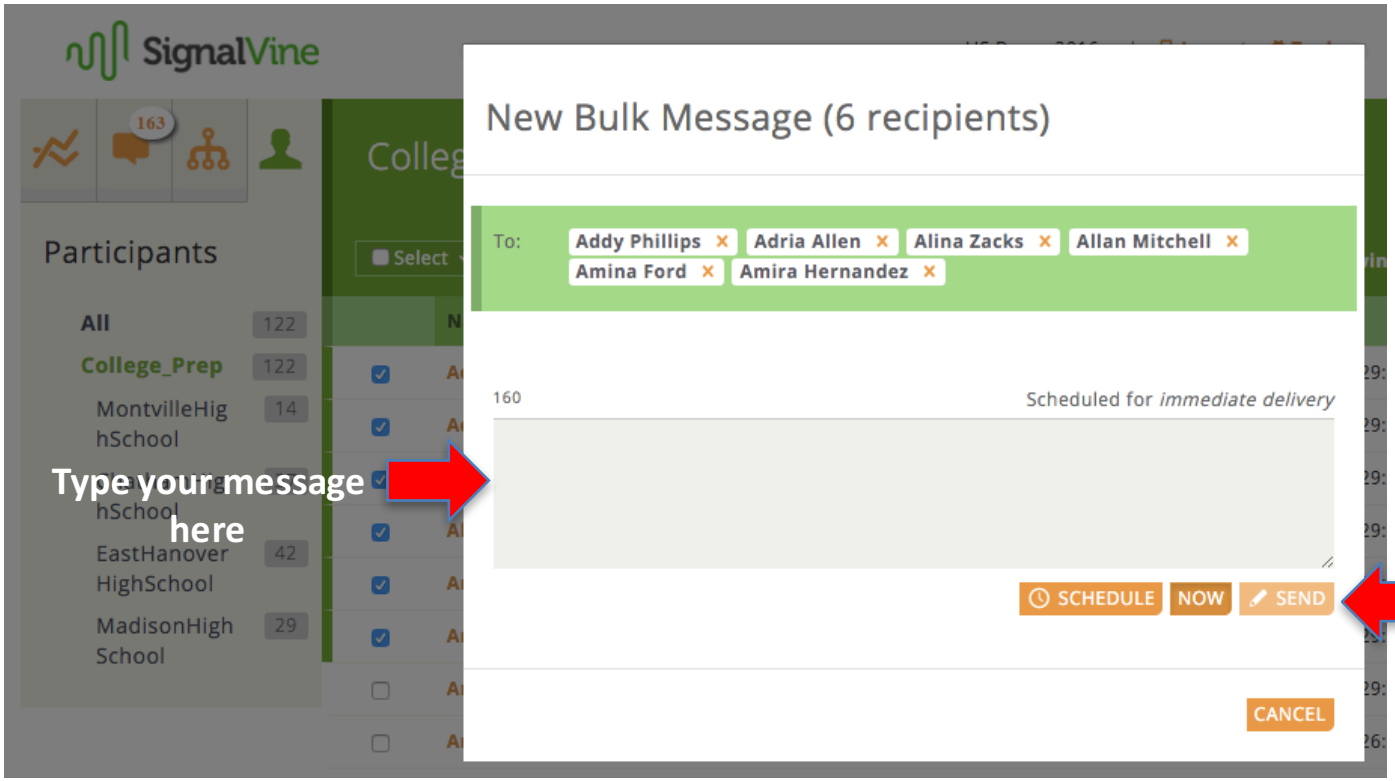




After selecting multiple participants, you can perform some bulk actions using the **ACTION** drop-down menu: **SCHEDULE MESSAGE**, **START**, or **STOP**.

Bulk Messages

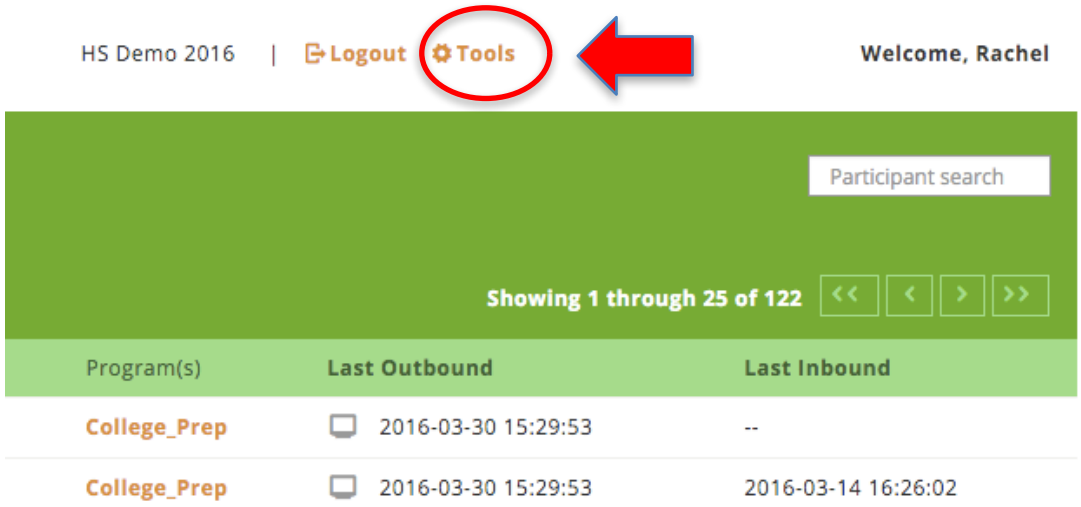
When you send a bulk message, a new screen will pop up, allowing you to either **SCHEDULE** a future message using the calendar or to send it **NOW** and then click **SEND.** This message is not like a group chat on a phone, rather it is like an email BCC. None of the students will know that any of the others are also receiving this message.

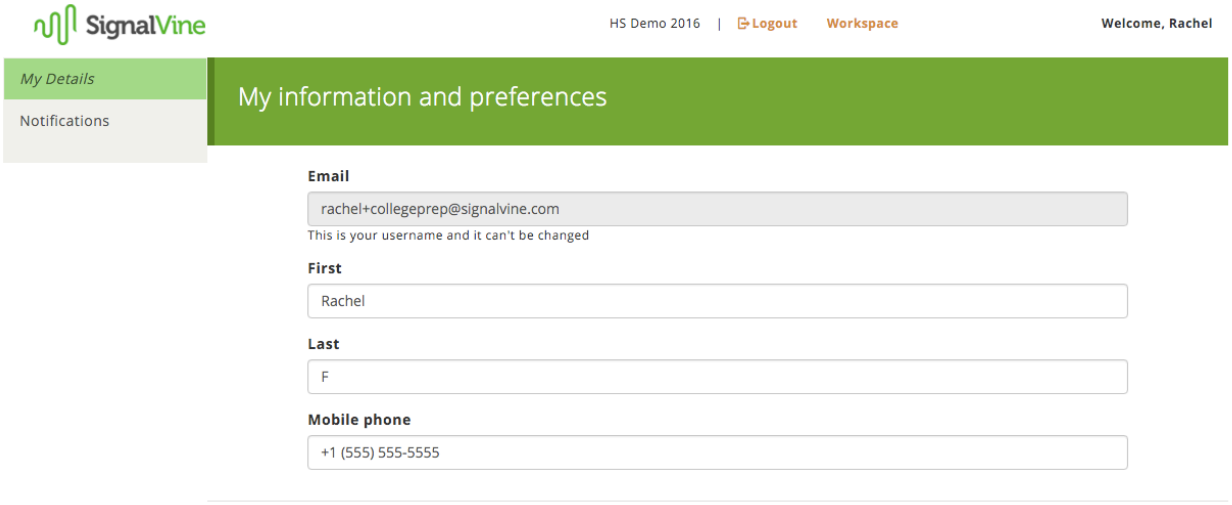


Either send it now, or schedule it to be sent later

Tools

If you select **TOOLS** from the upper right side of the page (from any tab), you will be brought to a screen in which you can edit your user information.

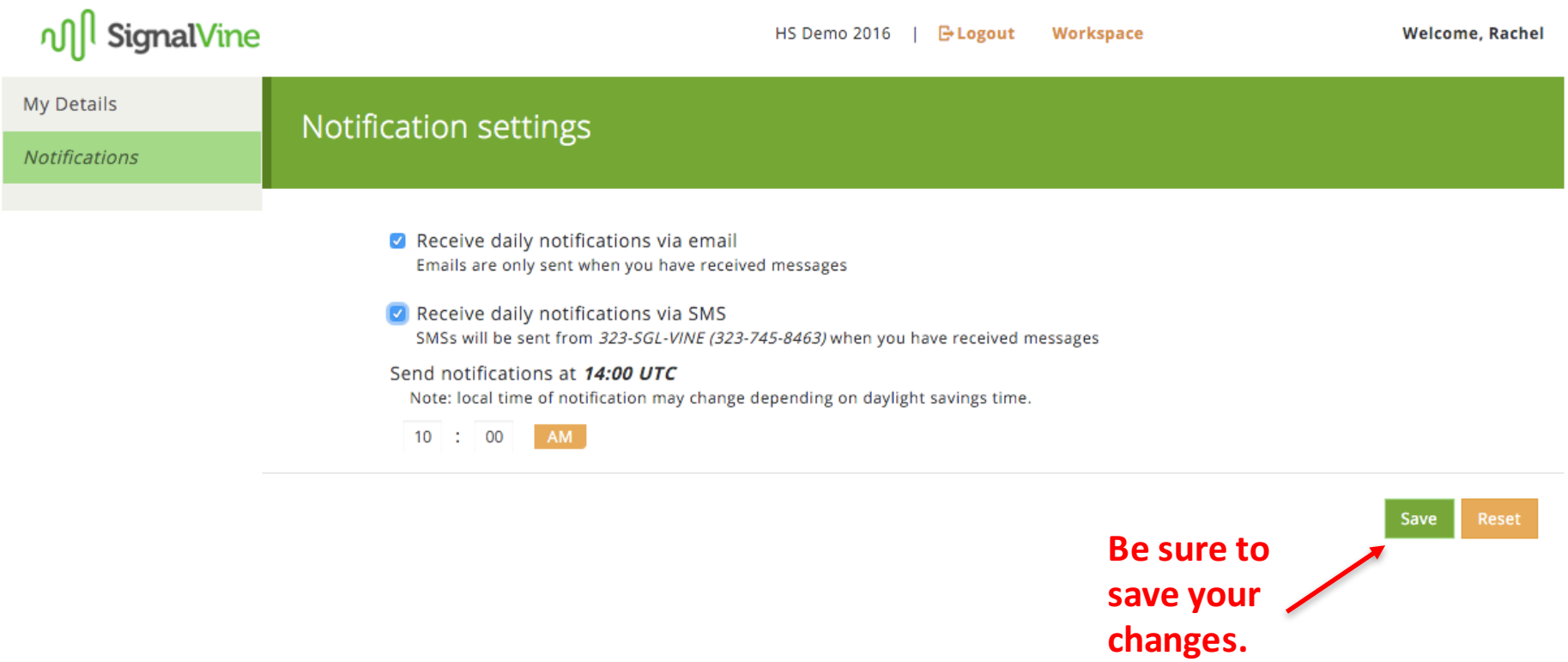




You can edit how your first and last name will appear on the platform to other users (this will never be shown to participants). We ask for your mobile phone number for SMS notification purposes.

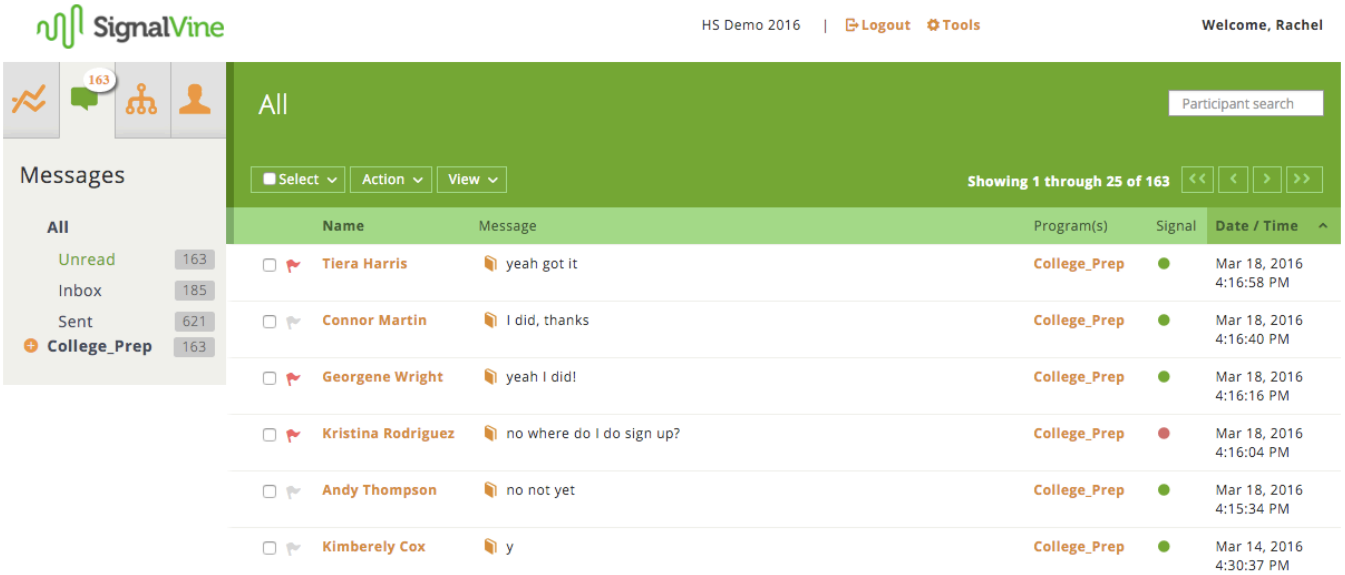
Daily Notifications

You can sign up to receive daily notifications when you have UNREAD messages in your inbox. You can receive these messages via email and/or SMS. On this page, you can also select what time you would like to receive these daily emails and/or text messages.



Return to Inbox

Finally, to return to your inbox, click on **WORKSPACE** at the top right of the screen and you will be brought back to your **unread** messages folder.



Support

For additional questions or comments contact:

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