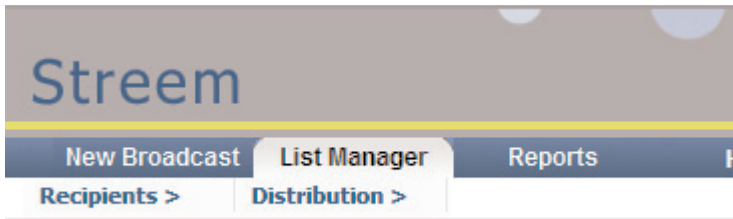


Stream Alert List Management

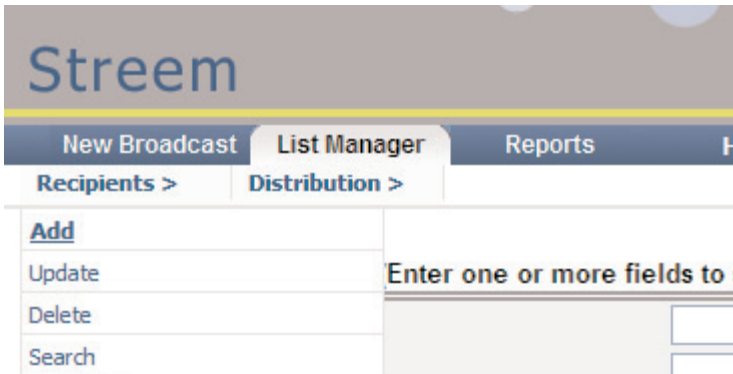
Building a Recipient Database

Cleo's Stream Alert® provides a comprehensive list management tool via the web launch interface. To build a recipient database, simply login to the web interface and follow the steps below.

Step 1 - Select the List Manager from the top menu and choose 'Recipients' from the sub-menu.



Step 2 - In the Recipients drop-down menu, select 'Add'.



Step 3 - Enter the recipient information in the provided fields. Required fields include First Name, Last Name, and a minimum of one delivery method. Optionally, select 'More Info' to add additional information. Additional information entered allows for additional options when searching and sorting Recipients, and retrieving lists. To add additional Recipients, repeat steps one through three.

Add Recipient (Enter/update recipient details (* = required))

First:	<input type="text"/>
Middle:	<input type="text"/>
Last:	<input type="text"/>
Title:	<input type="text"/>
Department:	<input type="text"/>
Company:	<input type="text"/>
Share Level:	Share with my company <input type="checkbox"/>
Work Phone:	<input type="text"/> (area code required)
Home Phone:	<input type="text"/> (area code required)
Cell Phone:	<input type="text"/> (area code required)
Fax:	<input type="text"/> (area code required)
Email:	<input type="text"/>
Text Messaging (SMS):	
Text Msg Number:	<input type="text"/>
Text Msg Provider:	Other <input type="text"/>
Text Messaging (SMS):	<input type="text"/>
Pager:	<input type="text"/>

[More info...](#)

Helpful Hints

Search for a Recipient: Click "Search" on the Recipient pull down. Enter a name (first and last), and select "Submit" at the bottom of the page. To search all Recipients, simply click "Submit" on the blank page.

Update Recipient: Click "Update" on the Recipient pull down. Enter the name of the person to update and select "Submit". Or, once a Search has been done, select Recipients to be updated by clicking "Update" next to the name.

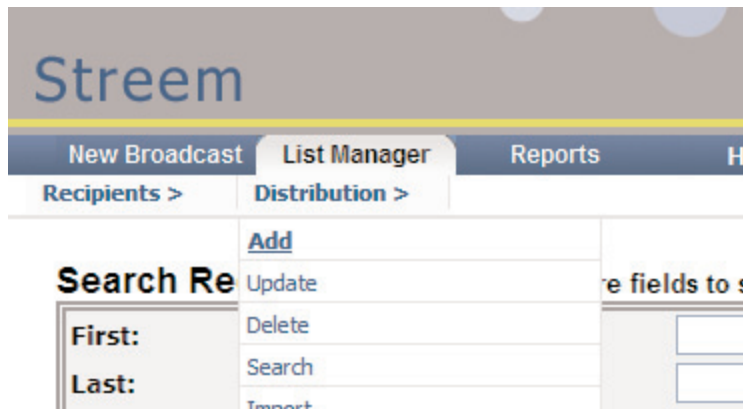
Contact Methods: How you would like to reach your Recipient. One or more Methods can be selected, including "Home Phone", "Cell Phone", "Work Phone", "Email", "Text Messaging"*, etc.

Note: Before using Text Messaging, be sure to know whether or not there is an extra charge on your Recipient's cell phone contract!

Building a Distribution List

Once the recipient database is built, separate distribution lists can be created based on the contacts that should receive the message. Multiple distribution lists can be created.

Step 1 - Select the List Manager from the top menu and choose 'Distribution' from the sub-menu. In the Distribution drop-down menu, select 'Add'.



Step 2 - Name the list.

Add Distribution

Name:	<input type="text"/>
Type:	<input checked="" type="radio"/> Static <input type="radio"/> Dynamic
Authorized:	<input type="checkbox"/>

Step 3 - Select the Type and Share Level

Add Distribution

Name:

Type: Static Dynamic

Authorized:

Static List: A static list remains the same unless recipient names are manually added or deleted from a list.

Dynamic List: A dynamic list allows recipients to be added or deleted automatically as distribution criteria is modified.

Example: A list of 25 individuals living in the 90210 zip code is created on Monday. On Tuesday 20 more individuals are added to the database, five of those have the 90210 zip code, which are then automatically added to the 90210 Distribution List.

Description:

Share Level:

To search for recipients to add to the distribution list begin by:

- Select the plus (+) to add search criteria.
- Select the field to search from the Field drop down list.
- Select the operator from the Operator drop down list.
- Enter the search terms into the value field.
- Select the "Search Users" button.

Require ANY of the following

+	Field	Operator	Value	
	First Name	Contains	Paula	x
	Last Name	Contains	Hardin	x
	Last Name	Contains	Sneed	x

<input checked="" type="checkbox"/>	Name	Contact	Type	Details
<input checked="" type="checkbox"/>	John Hardin	(815) 282-7810	Phone1	Details
<input checked="" type="checkbox"/>	Andy Sneed	(815) 282-7628	Phone1	Details
<input checked="" type="checkbox"/>	Paula Harkness	(815) 282-7809	Phone1	Details

Step 4 - Save the Distribution List

Share Level

Step 5 - Verify the list is saved by selecting the Distribution sub-menu and choosing 'Search' from the drop-down menu. On the Search Distribution screen, select 'Search List' to see all lists created.

Stream

New Broadcast | List Manager | Reports | Help

Recipients > | Distribution >

Add
Update
Delete
Search

Search Distribution (Enter one or more fields to search for list(s))

Name: Type: Static Dynamic

Step 6 - Identify that the newly created list is included within the distribution lists available.

20	Spring Retreat	Static
25	Staff Announcement	Static
17	Stream Team	Static

Stream Alert offers a 'Help' feature within the web interface, which provides a quick reference for the basic features of the list management tool.

Cleo Communications, 4203 Galleria Drive, Loves Park, IL 61111

P 800-325-7732, F 888-435-2348, StreamInSales@cleo.com, www.cleo.com

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