Manage Communication Channels (audience: admins who send out messages)

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Overview of Channels

Organization admins create channels to meet a specific communication need, such as emergency alerts, weather alerts, newsletters, or regular updates. You can add any combination of individuals based on location, teams, departments, or the whole organization as recipients in a channel.

Administrators can predefine a channel's delivery methods, recipients, and sender profiles. They can also allow subscriptions to a channel, define who can subscribe, and enable the subscribers to receive communications along with the groups and contacts of the channel.

You can do the following in the **Channels** section:

- Create channels
  - Create channels manually
  - Create channels using import
- Add recipients
- Add and update admins
- Setup channel
- Update existing channels
- Configure default message methods and sender profile
- Manage channel subscription
- Manage subscribers

Create Channels

Create Channels: Overview

The organization admin can create channels based on the organization's structure or communication requirements. You can create channels in the **Channels** tab.

Regroup supports creating channels as follows:

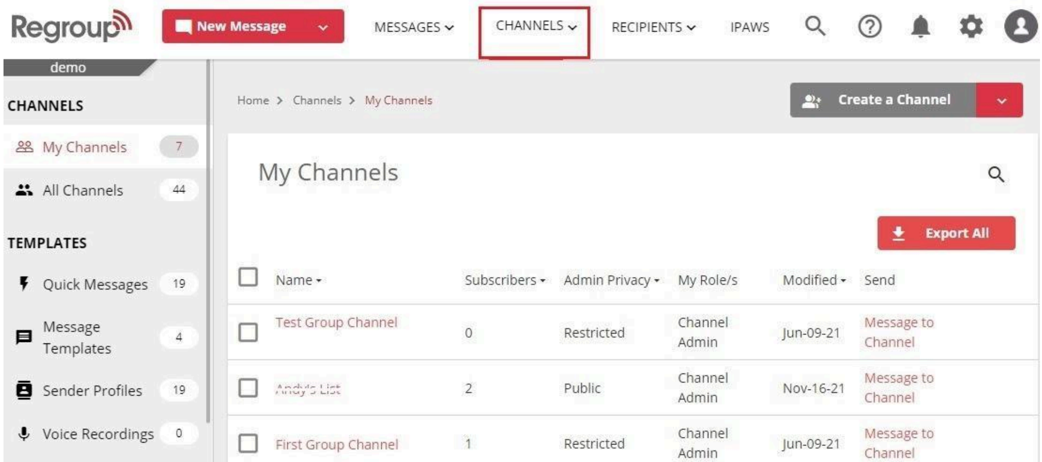
- Create channels manually
- Create channels using import

Create Channels Manually

You can create channels in the **channels** tab. When creating channels manually, you can create only one channel at a time.

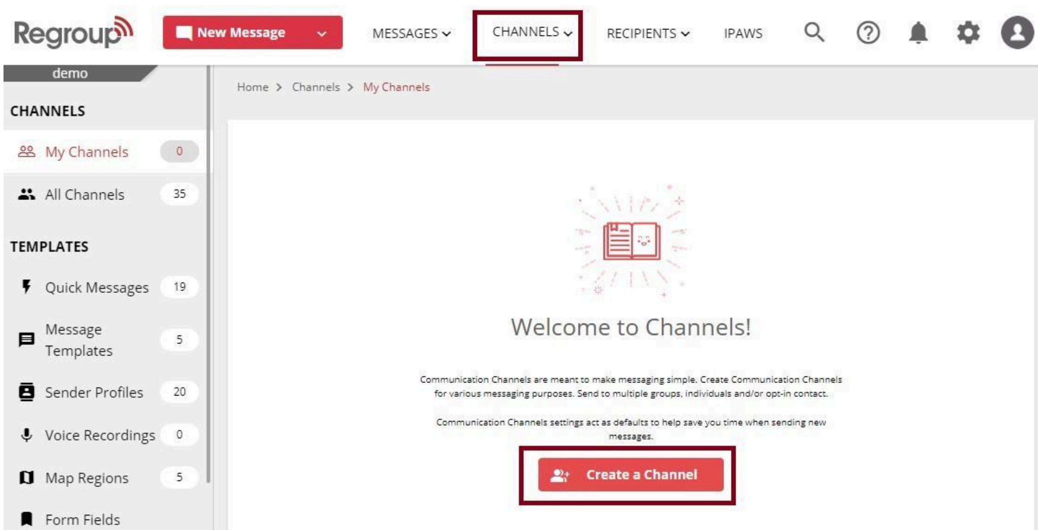
Here is how you create a channel:

1. Click the **Channels** tab. See the following image:

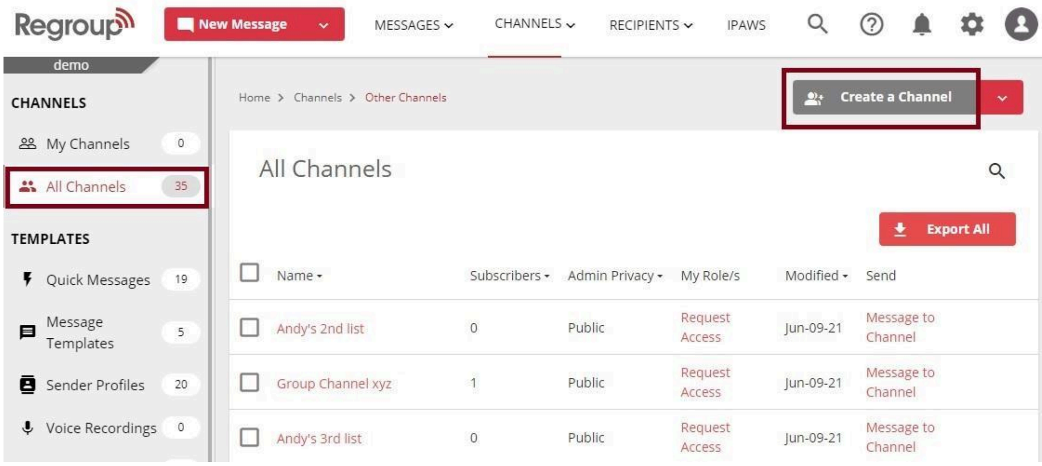


The My Channels page appears.

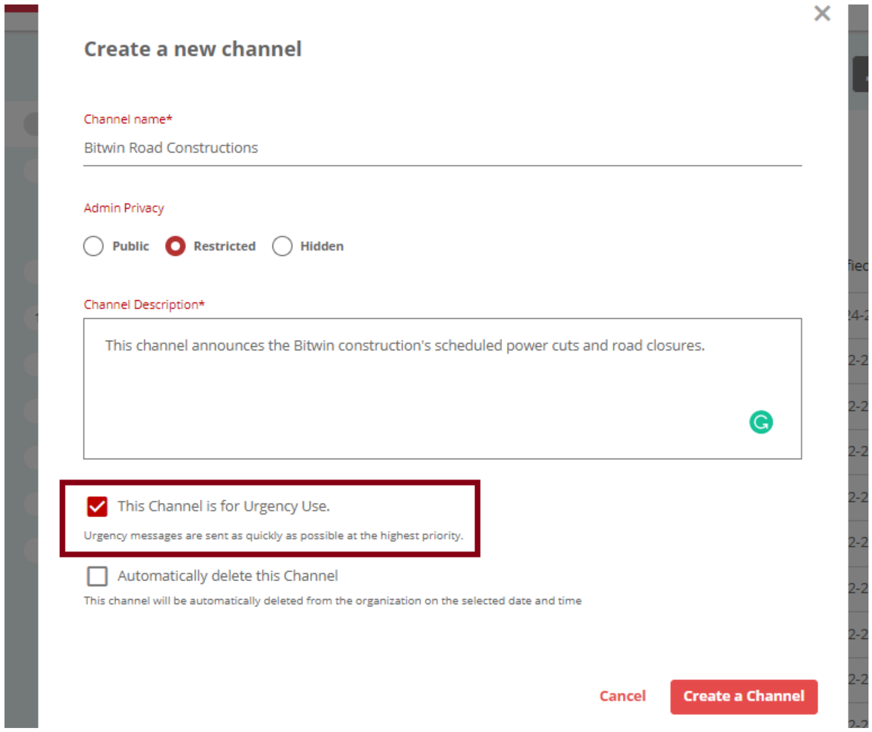
2. Click **Create a Channels** button. See the following image:



The create channel button appears on the top right corner of the **My Channels** and **All Channels** pages if you have created other channels. See the following image:

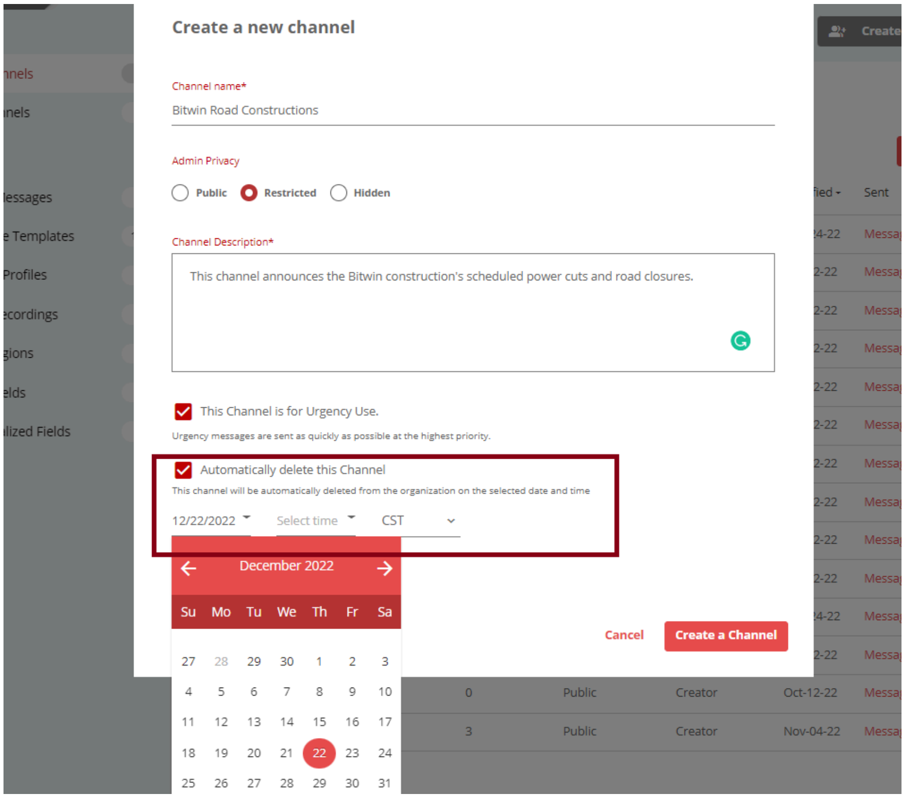


3. Enter a channel name in the **Name** field.
4. Select **Admin Privacy** from the following options. Admin Privacy determines who can access the channel.
    - **Public** - Allow all admins to view and send messages to this channel.
    - **Restricted** - Allow all admins to view and request access to this channel.
    - **Hidden** - Allow only admins with access to this channel to view or send messages to this channel. Other admins cannot see this channel.
5. Enter a description for the channel in the **Channel Description** field.
6. Click and enable the **This Channel is for Urgency Use** checkbox to prioritize all the messages sent from this channel. The system sends urgent messages quickly. See the following image:



7. If you are creating the channel for a limited period, click **Automatically delete this Channel** checkbox. Select a date and time when the system must delete the channel.

   See the following image:



8. Click **Create a Channel**.

   You get a message confirming the creation of the channel.

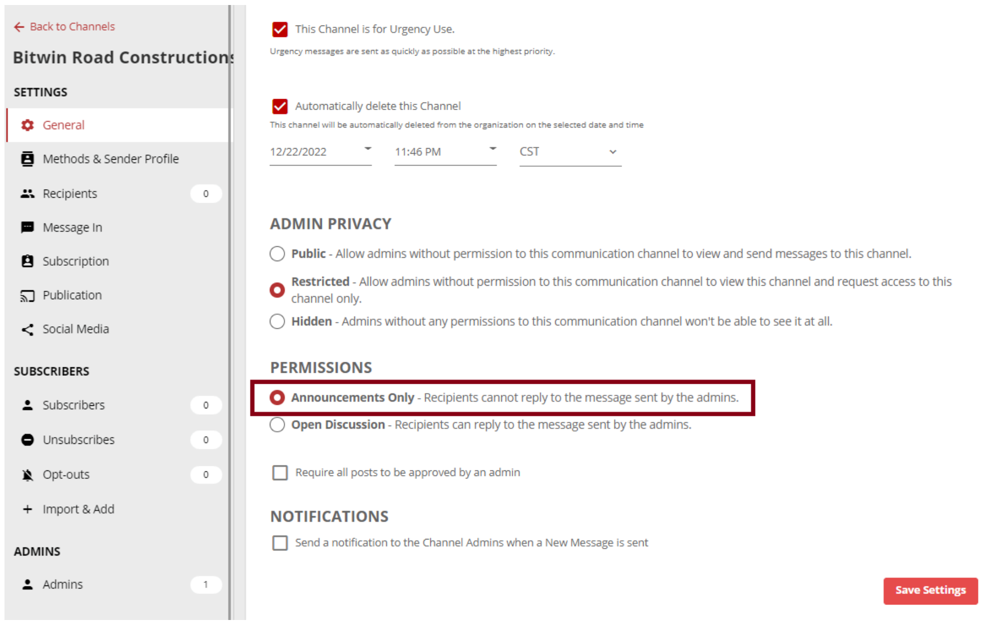
   The **General Settings** page for the newly created channel opens.

   Note: You can copy the Token ID to manage RSS feeds and the channel ID while importing channels or sending messages using API.

9. Scroll down to the **Permissions** section. Select either of the following two options to define if the recipient can reply to this channel:

   - **Announcements Only** - Recipients cannot reply to the message sent by the admins.
   - **Open Discussion** - Recipients can reply to the message sent by the admins.

See the following image:



10. Click **Require all posts to be approved by an admin** checkbox to assign an admin to approve all messages sent from this channel.
11. Click the **Notification** checkbox to notify the channel admins when any admin sends a new message.
12. Click **Save Settings**.

    You get a message confirming the channel update.

Create Multiple Channels Using Import

Create Multiple Channels Using Import: Overview

You can create multiple channels at a time using the following three options:

- SFTP (Secure File Transfer Protocol) import
- Web import using CSV (Comma Separated Values) file
- API Import of Channels

Import using API

Import Channels Using SFTP

Regroup allows you to import the groups, channels, directories, contacts, and admin data through our SFTP (Secure File Transfer Protocol) file servers using the CSV (comma-separated values) files.

The network admin can configure the SFTP import in the **SFTP Imports** section of **Contact Management**. You can also automate this process using a script that would send a CSV from your information system into Regroup.

For an SFTP import, you must have an FTP client. With Regroup, you can complete the SFTP import with the following four steps:

1. Configure the SFTP import
2. Map and Download the CSV file with correct syntax
3. Create the CSV file with your import data
4. Select the Processing Style
5. Upload the CSV file to Regroup's SFTP server
6. Receive the email with the import status.

In the **SFTP Imports** section**,** you can configure the SFTP import. You can also map and download the CSV file with the correct syntax guideline for admin and contact Import.

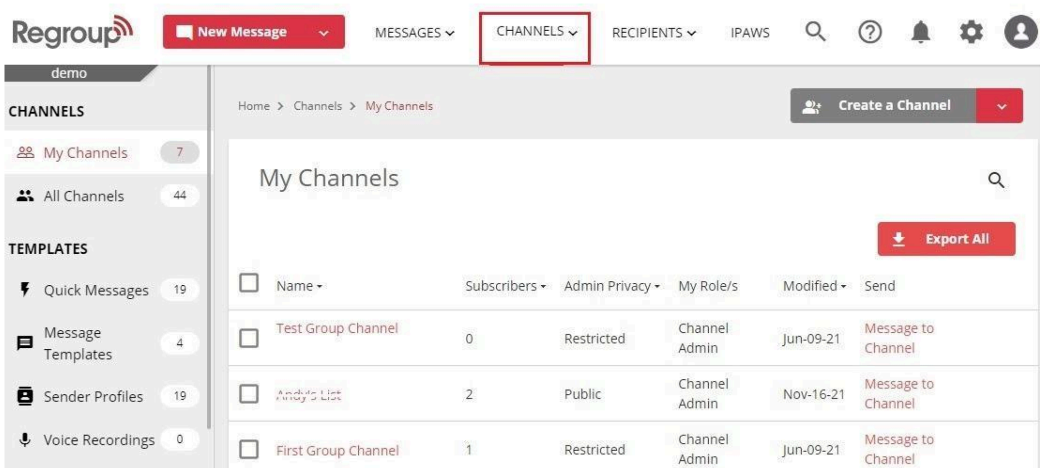
Web Import of Channels Using CSV File

You can create multiple groups using the web import of a CSV (Comma Separated Values) file. You first list out all the groups into a CSV file with the correct syntax and then upload it.

Note: If your CSV doesn't have the correct structure, you can adjust it in the Map Your Data section.

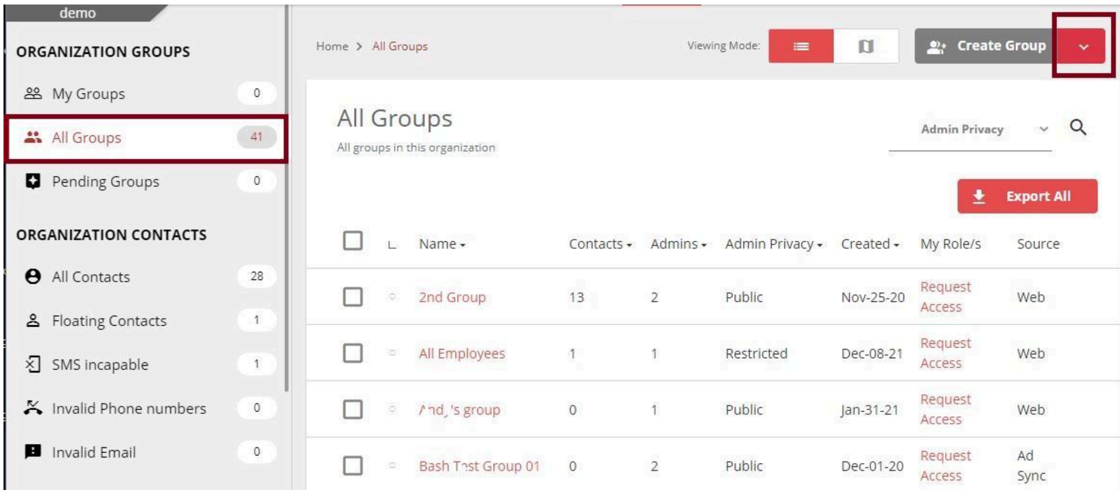
Here is how you download the sample CSV, upload the updated one, and map your data:

1. Click the **Channels** tab. The following image highlights the channels tab:

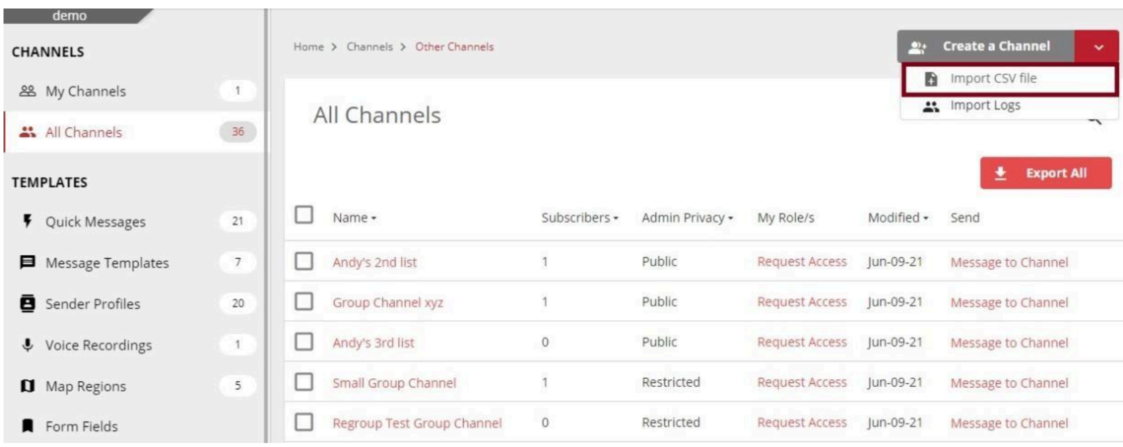


   The My Channels page opens.

2. Click the **All Channels** tab if you're an organization admin. Channel admins can export groups only from the **My Channels** tab.
3. Click **Create a Channels** dropdown in the top right corner. See the following image:



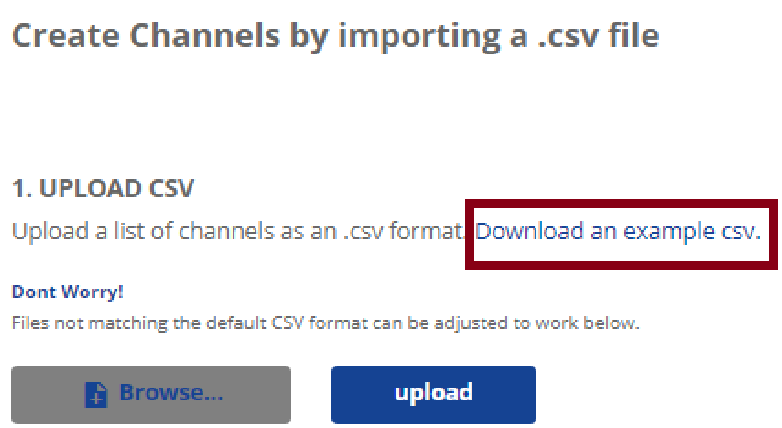
4. Click **Import CSV File**. See the following image:



The Create Channels by importing a .csv file page opens.

5. To download the sample CSV, click **Download an example csv.** button.

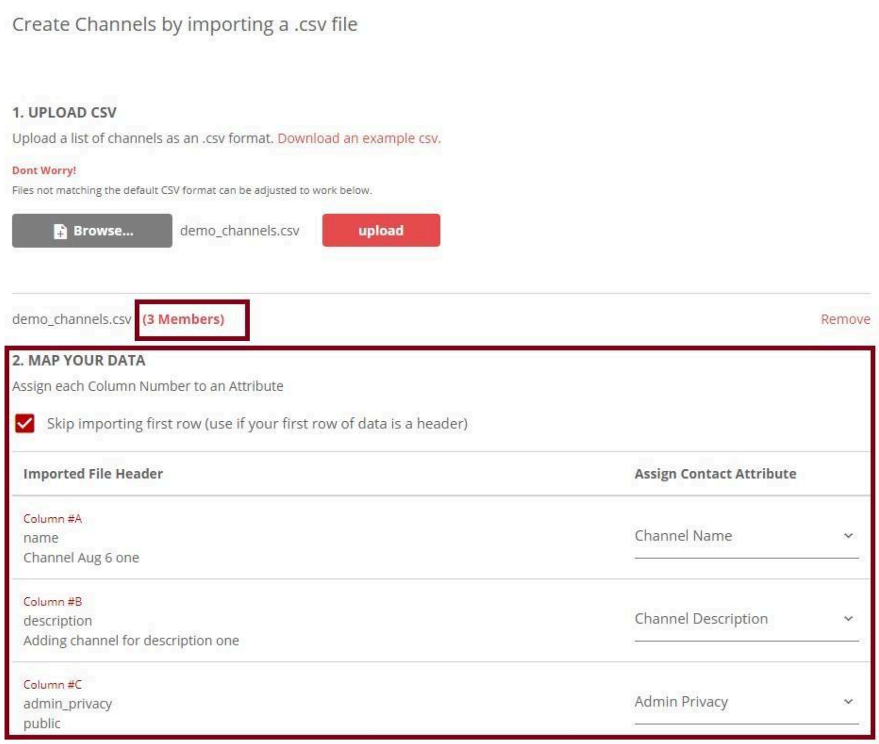
   The following image shows the option to download the sample CSV:



A sample CSV gets downloaded to your system. Use the downloaded CSV to populate the list of channels and attributes.

6. After preparing the CSV, click **Browse** to select and open the CSV from your computer.
7. Click **Upload**.

   The data you uploaded in your CSV gets populated in the **Map Your Data** section.
8. Verify the number of members recognized by the system. See the following image:

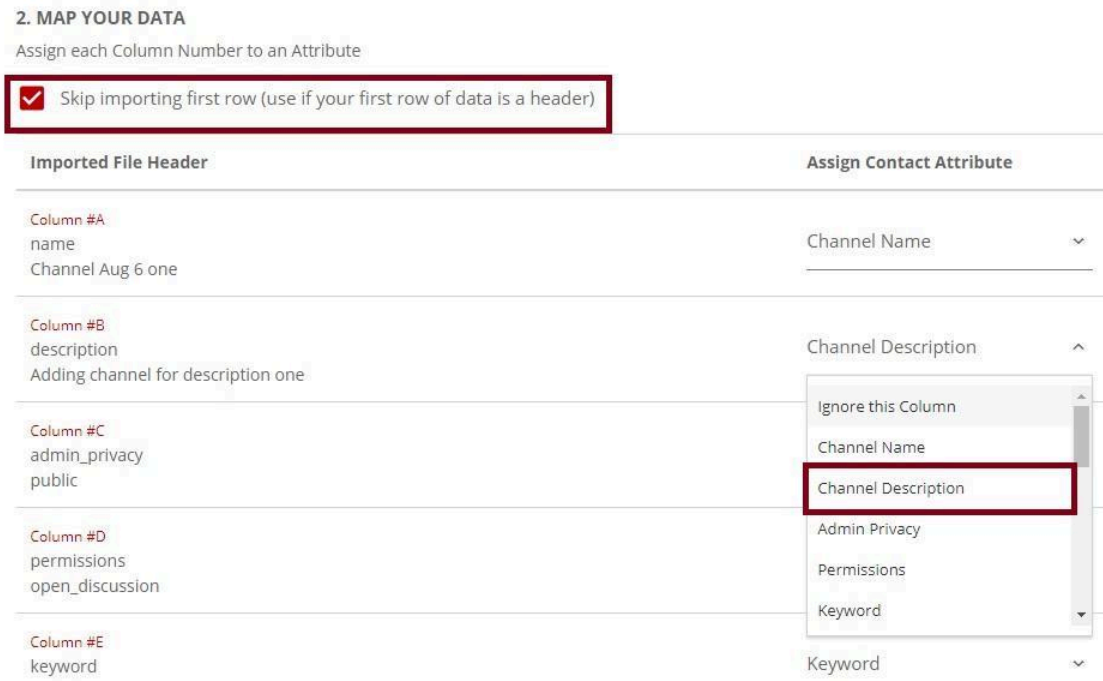


9. You can click **Remove** to remove the uploaded CSV.
10. If the first row on your CSV file is a header, click and enable the **Skip importing the first-row** checkbox. This prevents importing the values in the first row of the CSV as a channel or attribute. By default, this option is enabled.

    Note: The system maps the data by matching the fields in your CSV with the database fields of the application.

11. To map, click the **Assign Contact Attribute** (database fields) dropdown and select the correct attribute that suits the **Imported File Header** (CSV fields) column values.

The following image highlights the group description contact attribute and skips importing the first-row checkbox:



Note: If you cannot find a custom attribute here, you must go to the Custom Attribute tab of the Contact Management and add the attribute there.

12. Click **Add Channels.**

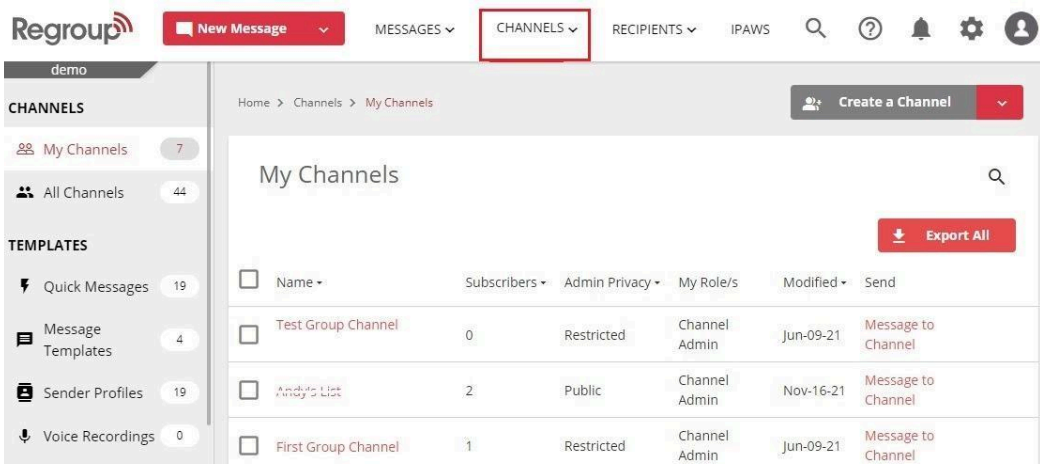
You get a confirmation message confirming the creation of channels.

View Import logs

You can view and export the details of all imports in the Import Logs section. The section lists the import status and contact addition details. You can also download the CSV file from the web or SFTP import.

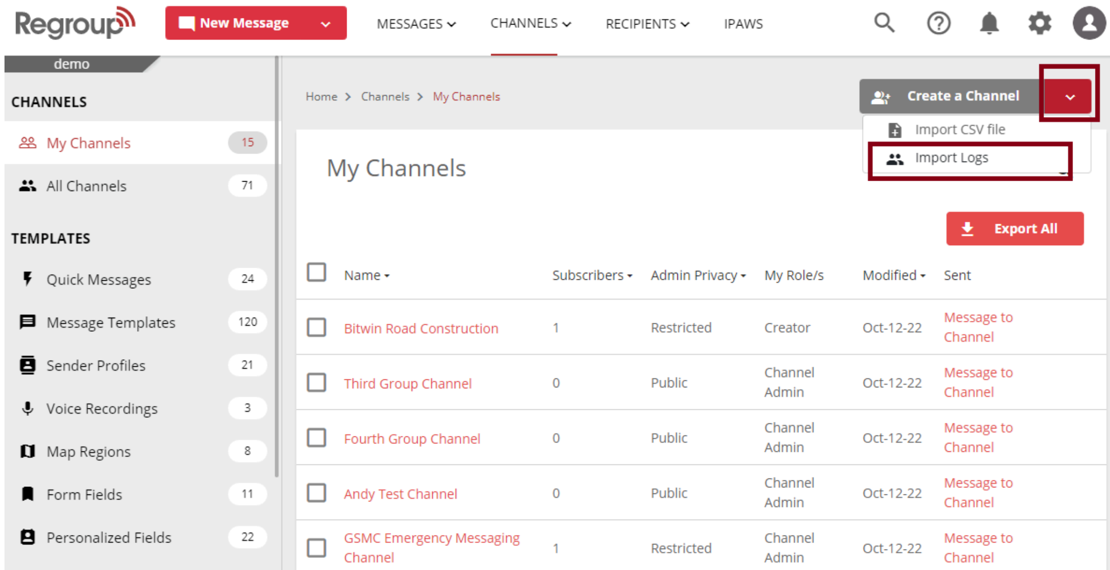
Here is how you view and download the details of your imports:

1. Click the **Channels** tab. See the following image:



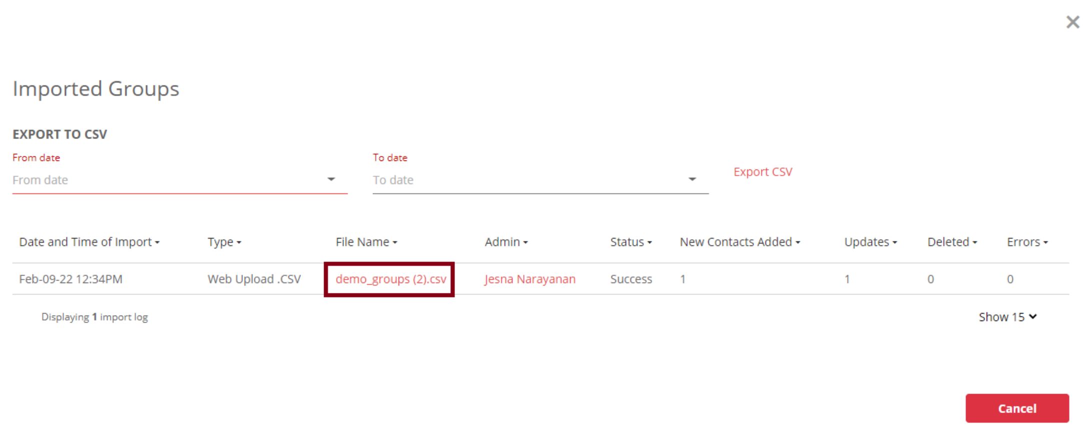
   The My Channels page opens.

2. Click the **All Channels** tab if you're an organization admin. Channel admins can export groups only from the **My Channels** tab.
3. Click **Create a Channels** dropdown in the top right corner.
4. Click **Import Logs**. See the following image:



The Imported Channels page pops up.

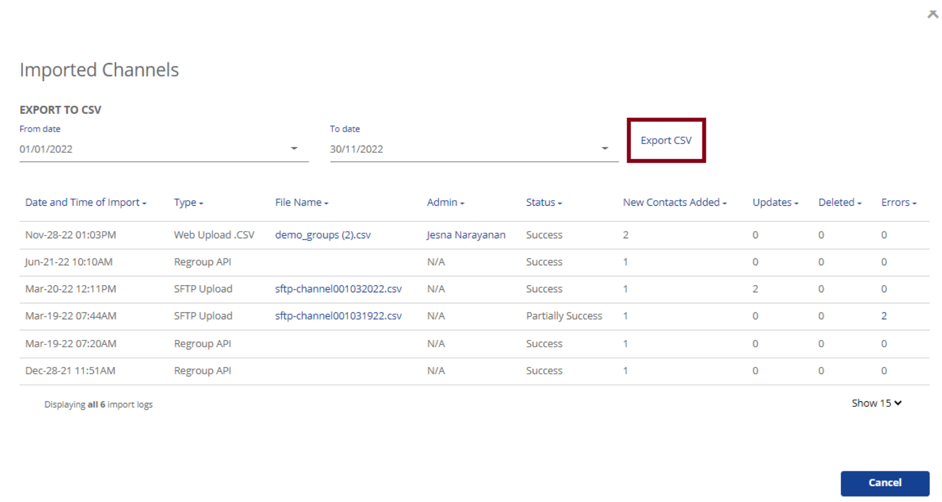
5. Click the file name under the **File Name** column to view the uploaded files. See the following image:



6. To view the admin's profile who uploaded it, click the name under the Admin column.

7. You can select the **From Date** and **To Date** from the respective dropdown to see the logs of the selected period.

8. You can click **Export CSV** to export all the import logs. See the following image:



The CSV file gets downloaded to your system.

9. Click **Save** to save the CSV (comma-separated values) file to your system with the desired name.
10. Click **Cancel** or close the page to exit.

Setup Channels

Setup the Channel: Overview

After creating a channel, the organization or channel admin can set up multiple configurations to improve the channel's functionalities.

- **Channel General Setting**: Set up the channel details, admin access permissions, reply permissions, and new message notifications for other admins.

- **Set Up Messaging Methods and Sender Profiles**: Configure a default message delivery method and sender profiles for all the messages sent from the channel.
- **Add Recipients**: Add groups, contacts in a specific location, or individual contacts as the recipient of channel messages.
- **Setup Message In**: Use the Message In feature to send messages to channel contacts by sending a mail to the channel Mail ID.
- **Setup Channel Subscriptions**: Determine who can subscribe to a channel. A subscriber can receive messages from the channels along with other contacts.
- **Manage Subscribers**: Edit a subscriber’s profile with details, remove them or promote the subscriber to admin.
- **RSS publication**: Use RSS (Really Simple Syndication) publication to publish messages from channels
- **Set Up Social Media**: Integrate the Regroup account with your social media pages to share messages.

Configure the General Setting of a Channel

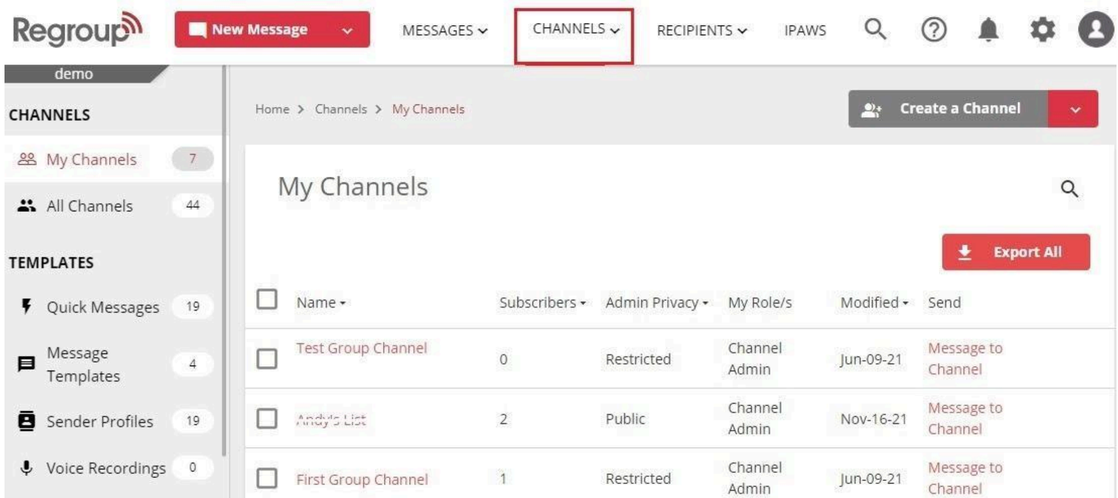
You can update the following general setting of the channel:

- **Details**: update the name and description and set up urgency use and auto-deletion.
- **Admin Privacy**: determine who can access, view, or send messages to a channel.
- **Permissions**: determine if message recipients can reply to the channel and if an admin should approve the channel messages.

- **Notification**: enable the system to notify an admin when anyone sends a message.

Here is how you configure the general setting of a channel:

1. Click the **Channels** tab. See the following image:



   The **My Channels** page opens.

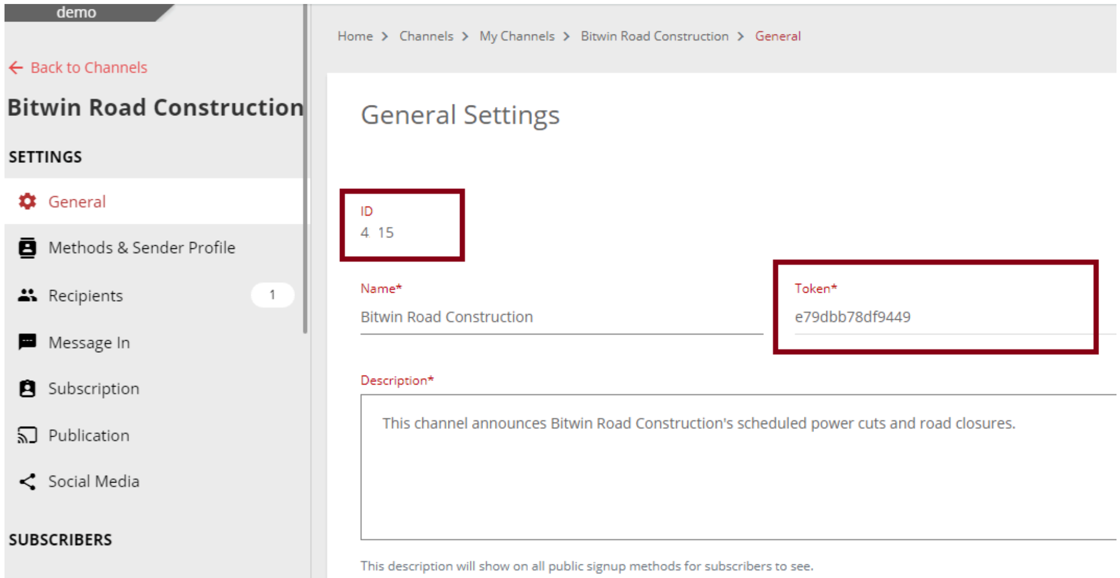
2. Search and locate the channel to update in the **My Channels** tab. The organization admins can edit channels on the **All Channels** tab too.
3. Click the name of the channel to open it.

   The **General Settings** page opens.

4. Click the **Name** field to update the name of the channel.

   Note: You can copy the Token ID to manage RSS feeds and the channel ID while importing channels or sending messages using API.

See the following image for Channel ID and Token:



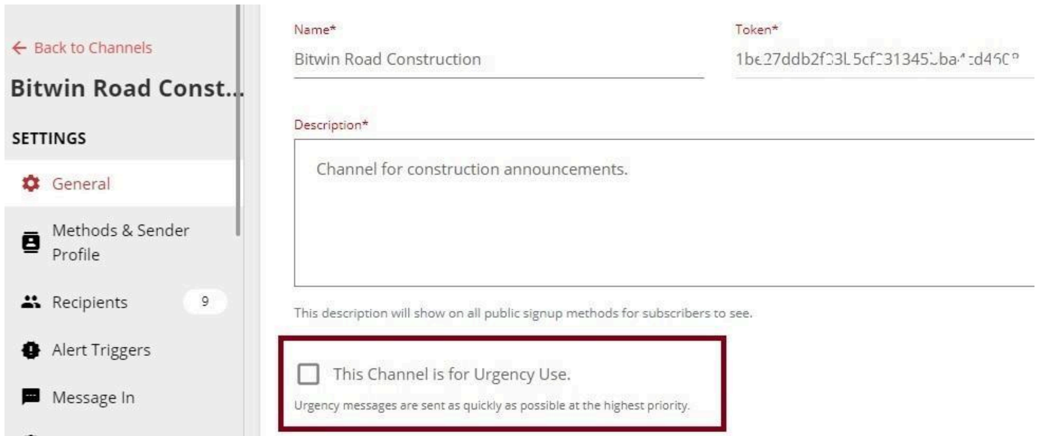
5. Click the **Description** to update it.

   The channel description appears on all public signup methods for subscribers to see.

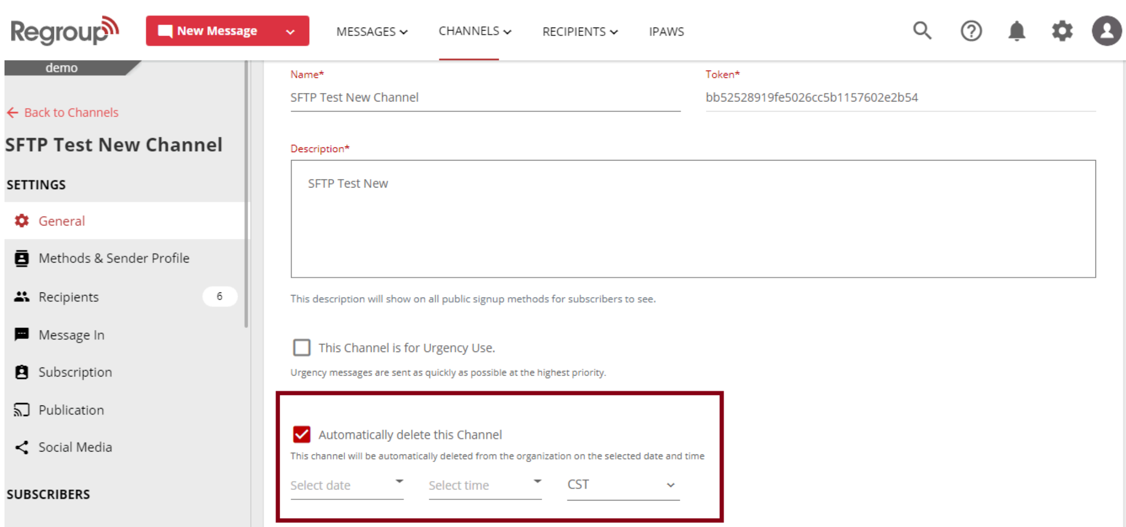
6. Click and enable the **This Channel is for Urgency Use** checkbox to prioritize all the messages sent from this channel.

   Tip: The system sends the urgency messages quickly.

The following image highlights the urgency use checkbox:



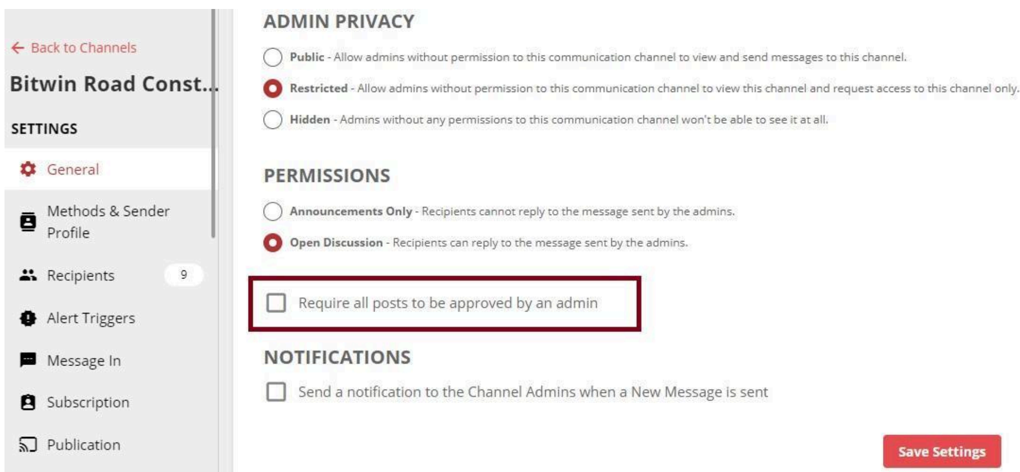
7. If you are making the channel for a limited period, click the **Automatically delete this Channel** checkbox. Select a date and time when the system must delete the channel. See the following image:



8. To update **Admin Privacy**, click one of the following checkboxes:
   - **Public** - Allow all admins to view and send messages to this channel.
   - **Restricted** - Allow all admins to view and request access to this channel.

- **Hidden** - Only admins with access can view or send messages to this channel.

9. To update **Permissions**, click one of the following checkboxes:
   - **Announcements Only**: Recipients cannot reply to the messages they receive.
   - **Open Discussions**: Recipients can respond to the messages they receive.
10. You can click the **Require all posts to be approved by an admin** checkbox to enable admin approval for sending messages. See the following image:



Note: If you enable the automated NOAA alerts for this channel, The system sends the NOAA alerts without approval from admins.

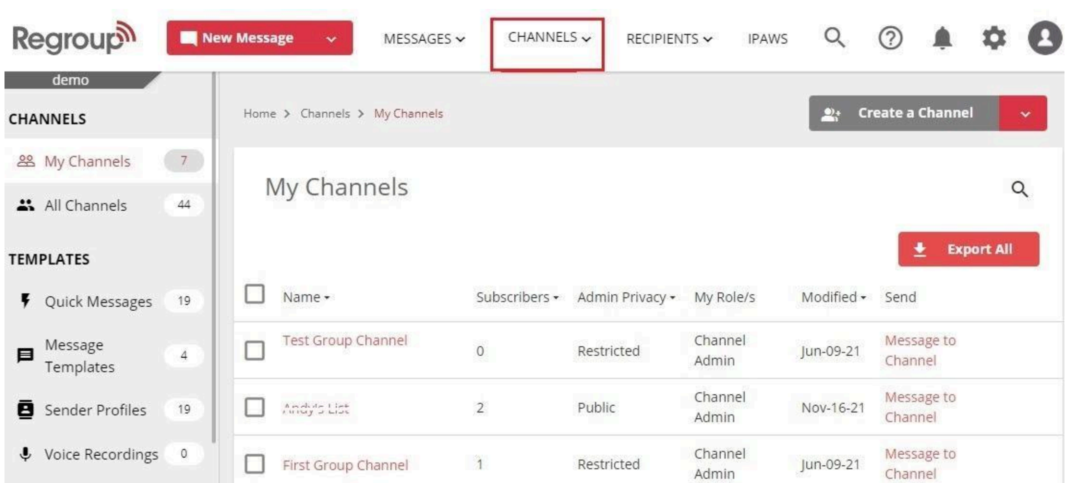
11. Click the **Notification** checkbox to notify the admins when any admin sends a new message.
12. Click **Save Settings**.

Configure Default Message Methods and Sender Profile for a Channel

You can configure a default message delivery method and sender profiles for all the messages sent from the channel. While sending a new message, admins can select pre-configured messaging methods with prefixed values and styles. Using default settings, admins can quickly access standardized messages for each requirement. When set up at the channel level, the default delivery methods appear preselected and updatable for all the channel messages.

You can set up default delivery methods and sender profiles at the channel or organization level. Here is how you configure the default message methods and sender profile at the channel level:

1. Click the **Channels** tab. See the following image:



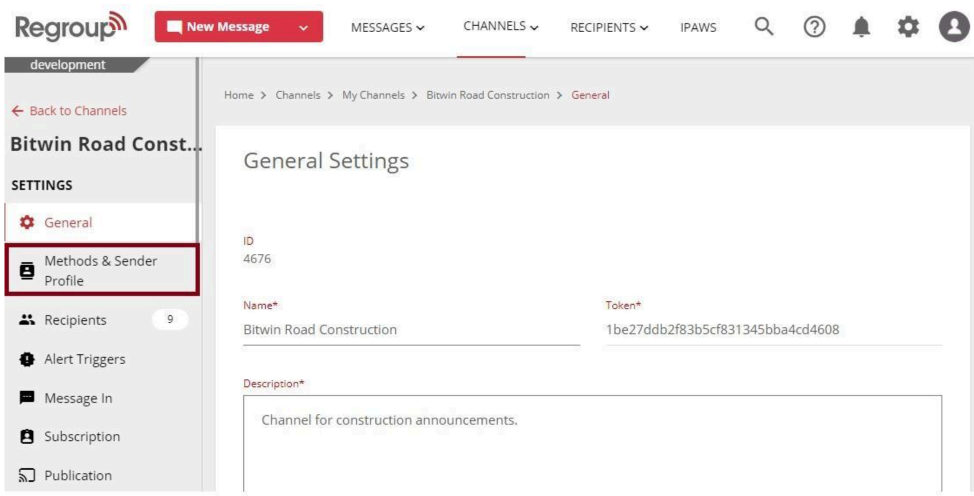
   The My Channels page appears.

2. Click the lens icon to search and locate the channel in the **My Channels** tab. The organization admins can configure channels on the **All Channels** tab too.

3. Click the name of the channel to open it.

   The **General Setting** page opens.

4. Click **Methods & Sender Profile** on the left navigation panel. See the following image:



   The Default Options page appears.

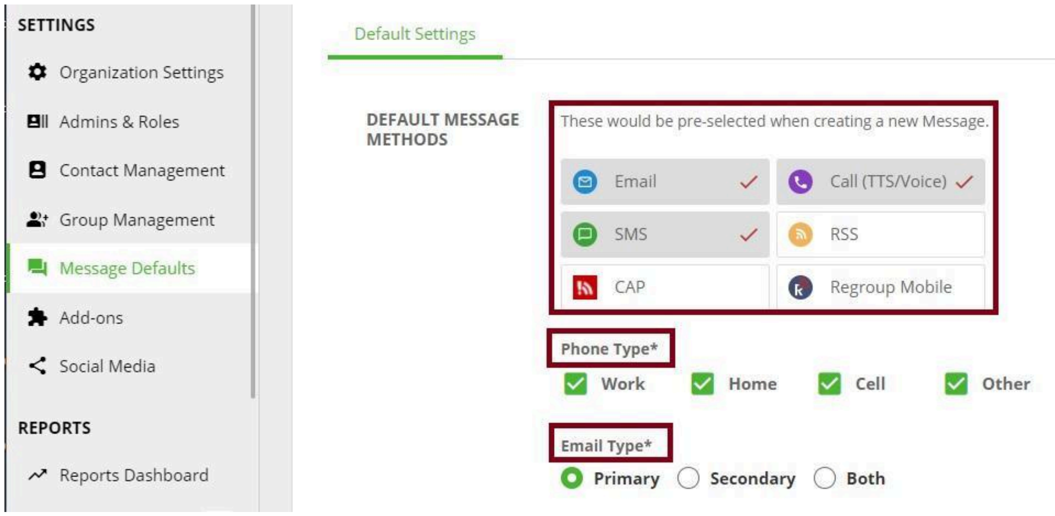
5. Select the messaging methods you want to set as default from the **Default Message Method Section**.

   Tip: The delivery methods you select here appear preselected when sending new messages.

6. If you choose **SMS or Call/TTS** and **Email** as the delivery method, you can specify the phone and email types to send the messages. Select the required from the following:

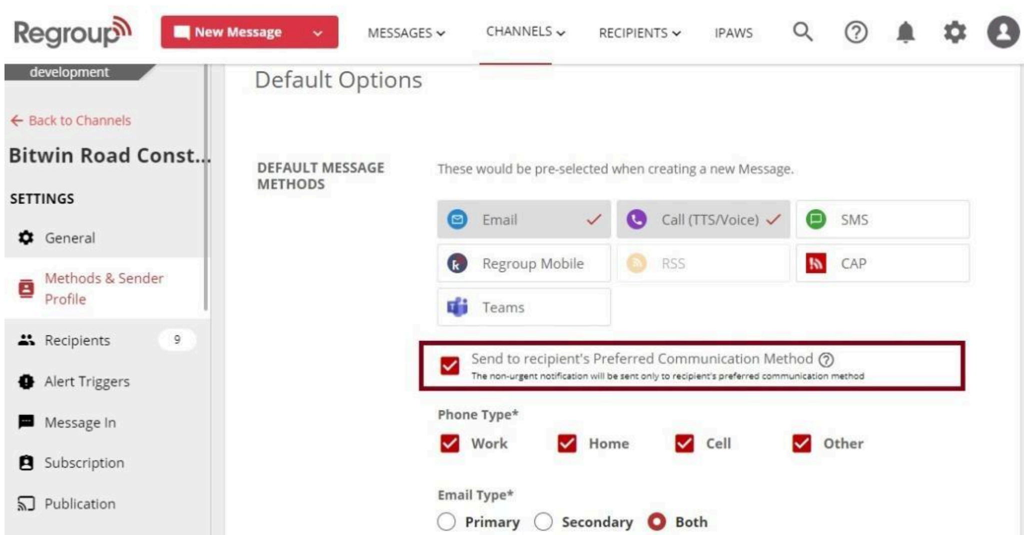
   - **Email Type**: Both primary and secondary are set as default.
   - **Phone Type**: All the phone types are selected for phone type.

   See the following image:



7. Click the **Send to recipient's Preferred Communication Method** checkbox to send non-urgent messages only to the recipient's preferred method.

   See the following image:

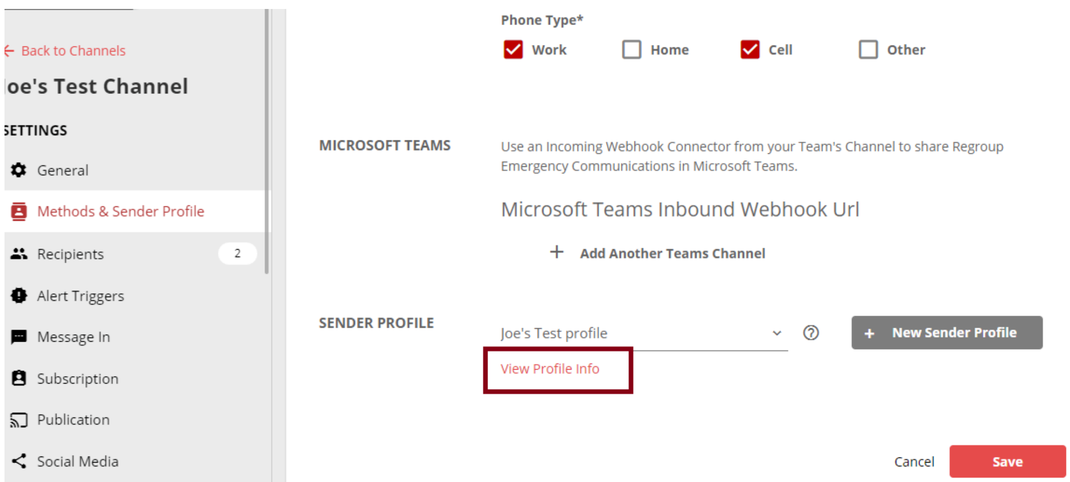


Note: The recipients without a selected method receive messages on all the methods you choose from the **Default Message Method** Section.

8. You can click the **Choose Sender Profile** dropdown in the sender profile section to select an existing sender profile as default for this channel.

   Tip: You can view and select only the sender profiles shared with you, the channel, or all admins.

9. You can click **View Profile Info** to see the details of the selected profile. See the following image:



10. You can create a new sender profile by clicking the **New Sender Profile** button. The **New Sender Profile** page opens. See the topic Create Sender Profiles, step 3 onwards, to create a new sender profile.
11. Click **Save** to save your selections.

Create and Manage Sender Profiles

You create sender profiles to pre-configure the sender details and the appearance of a message to contacts. While sending new messages, admins can use predefined sender profiles with prefixed values and styles. Sender Profile enables your organization to quickly access standardized messages for each requirement.

Organization admins can select a mandate sender profile to allow all admins to send messages **only using the mandate sender profile**. For a mandate sender profile, see the topic: Set up Mandate Sender Profile.

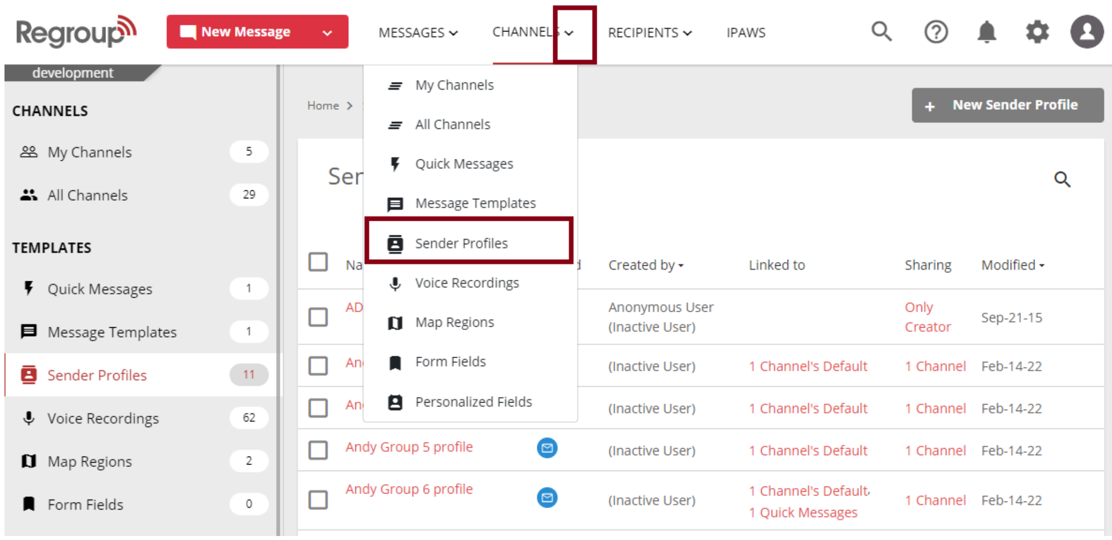
Create Sender Profiles

You can create sender profiles for your organization from the **New Sender Profile** Page. Admins can use this profile while sending messages or set it as default for the channels or organization.

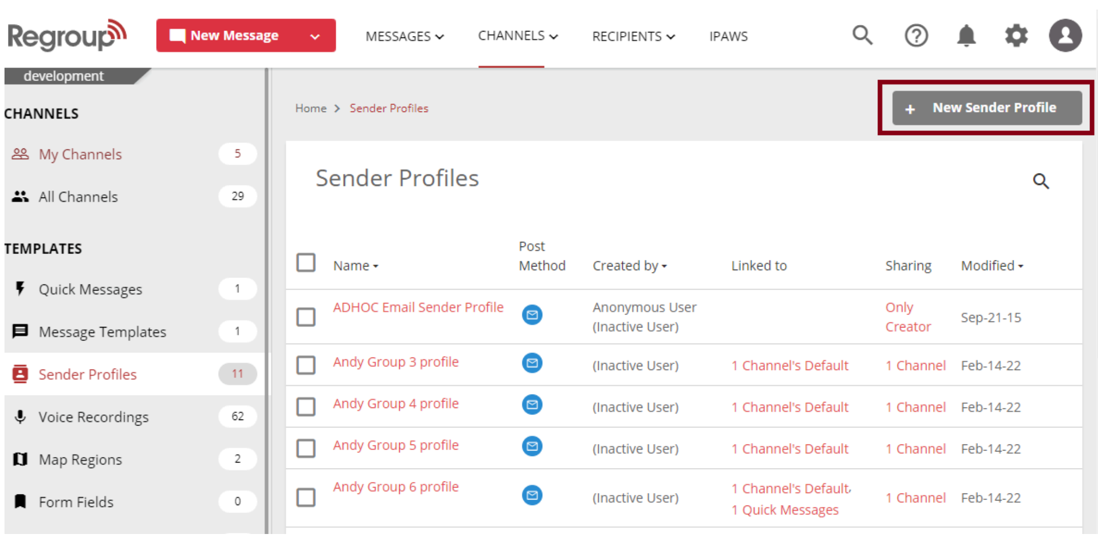
Admins can reach the **New Sender Profile** page while sending messages, configuring the channels, or setting up the organization. **If you're already on the New Sender Profile page, perform step 3 onwards to create a profile**.

Here is how you create the sender profile:

1. Click the **Channels** dropdown and select **Sender Profile**. See the following image:



2. To create a new sender profile, click the **+New Sender Profile** Button. See the following image:



The New Sender Profile page opens.

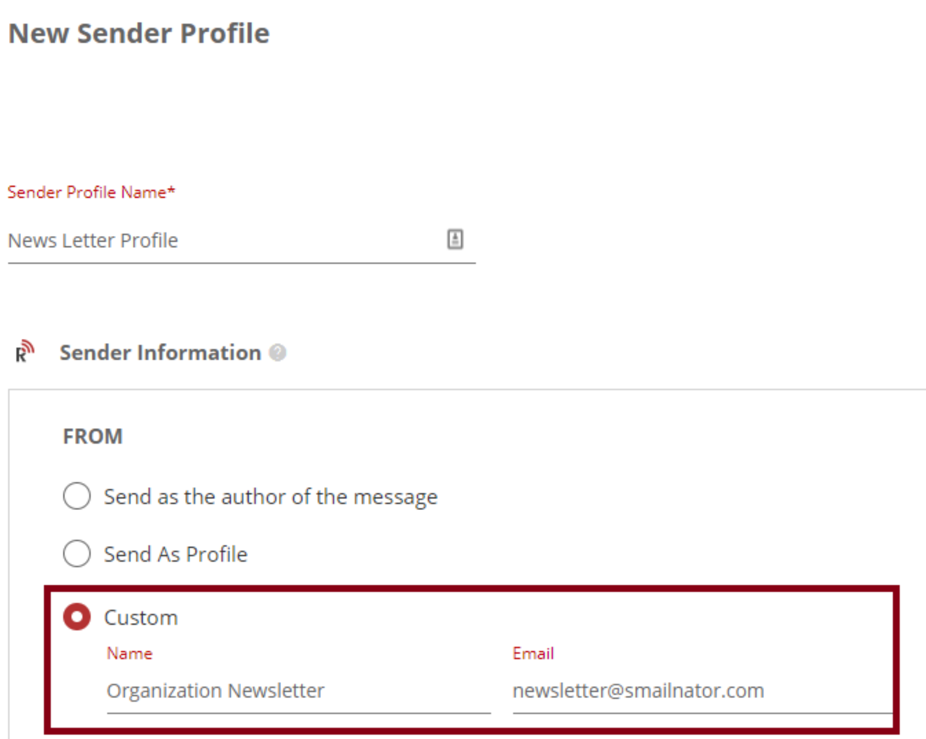
3. Enter a **Sender Profile Name.**

   Choose a name that helps you recognize the specialty of the profile to select from the sender profile dropdown list while sending messages.

4. In the **Sender Information** section, determine what appears as the sender of a message.

   Select one from the **From** field option.

   a. **Send as the author of the Message**: displays the name and email address of the admins who send the message.
   b. **Send as profile**: displays the name and email address of the channel or group from which the message is sent. The format of the channel or group email address is <group/channelname-#topicID@regroupcloud.com>
   c. **Custom**: displays the name and the email address you enter in the custom field. If you chose custom, enter the **Name** and a valid **Email Address**. See the following:



Tip: You can use the **Custom From** address to display your organization's name and email ID for easier identification.

5. **Email** section, configure how the email appears for the recipient:
    a. In the **Reply To** field, select how to receive the recipient's email replies:
        - **Replies are sent to the author of the message:** receive the replies in the email ID of the admin who sent the message.
        - **Reply to Profile:** receive the replies in the **Replies** tab of the sent message on the channel or group messages page.
        - **Use a custom reply-to email address:** receive the replies in the custom email address you provide here. If you choose the custom reply, enter the **Email Address** to receive the replies.

          Tip: You can use the **Custom Reply** option to set up a **do not reply email** address (do-not-reply@YourOrganization.com).

    Note: You must whitelist Regroup's email servers and clear our SPF record for custom addresses. If this is not done, **emails will probably get flagged as spam emails**.

    Regroup's Email Servers: Whitelist I.P.s: 146.20.191.120 || 146.20.191.121 || 146.20.191.122 || 146.20.191.123 || 146.20.191.137 || 146.20.191.34

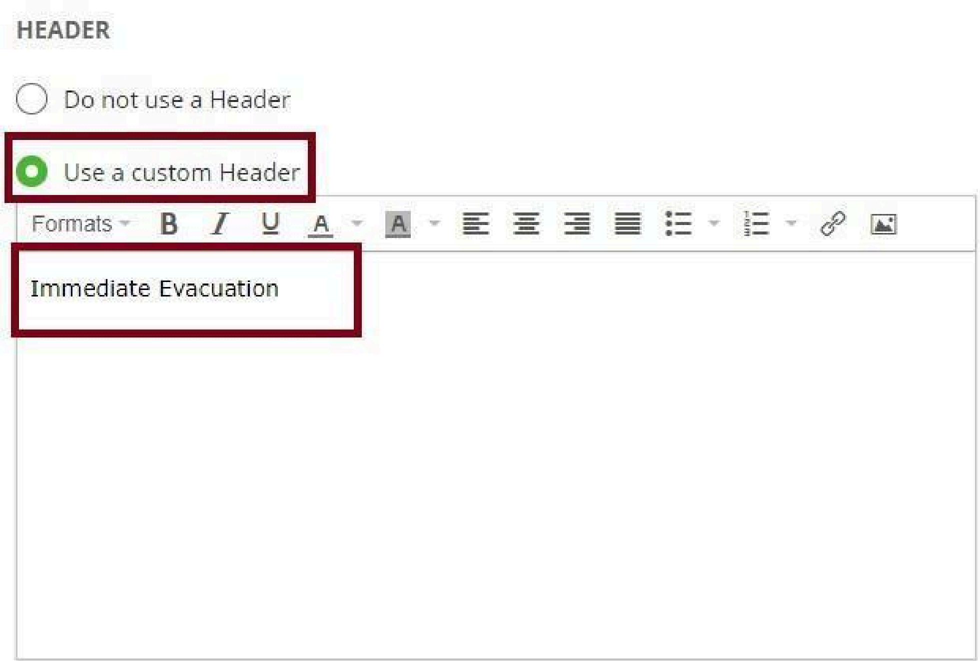
    SPF Record: http://regroup.com : DNS Record Type: TXT, Hostname: (**Your organization's domain),** Text: v=spf1 include:_spf.regroup.com -all

b. In the **Subject Prefix** field, select if any prefix text should appear at the beginning of the message subject line:

- **Use the default prefix**: [GROUP NAME]: prefix the group or channel name to the message's subject.
- **Do not use a prefix**: Add no prefix to the message's subject.
- **Use a custom prefix**: Add a custom prefix text to the message's subject.

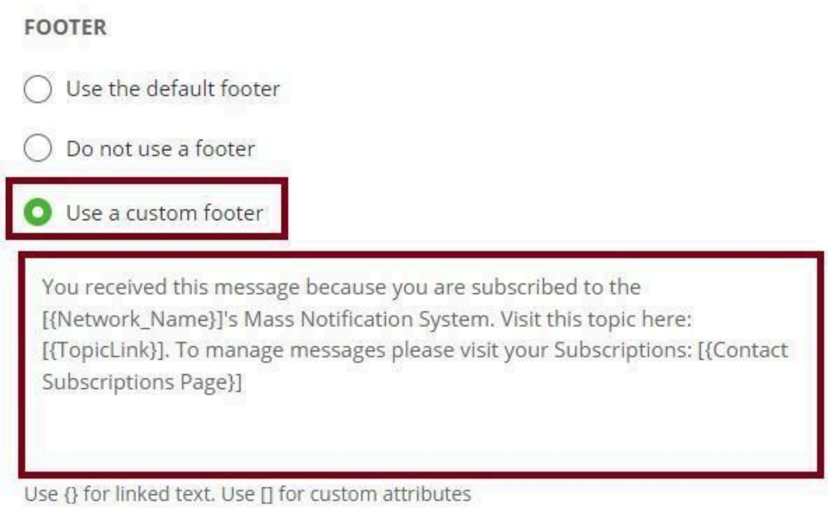
  If you chose custom, enter the required prefix in the text field.

c. In the **Header** section, select if your message should have a header. The options are **Do not Use a Header** or **Use a Custom Header.** If you choose a custom header, enter the required header in the text field. See the following image:



d. In the **Footer** field, you can customize the text at the end of your messages:

- **Use the default footer**: Use the default message footer. The default footer appears editable when you select the custom footer option.
- **Do not use a footer**: No message footer appears on the messages.
- **Use a custom footer**: Update the default footer text as required. You can click the default text to update it. See the following image:



6. In the **Text/SMS** field, you can add a custom prefix text to your SMS. To enable:

   a. Click the checkbox to **Enable SMS Prefix**. See the following image:

b. Enter the required prefix in the text field.

Note: The text messages have a 160-character limit. If the prefix is enabled, the text message box shows the character limit after the prefix's character count.

7. In the **Call (TTS/Voice)** field:

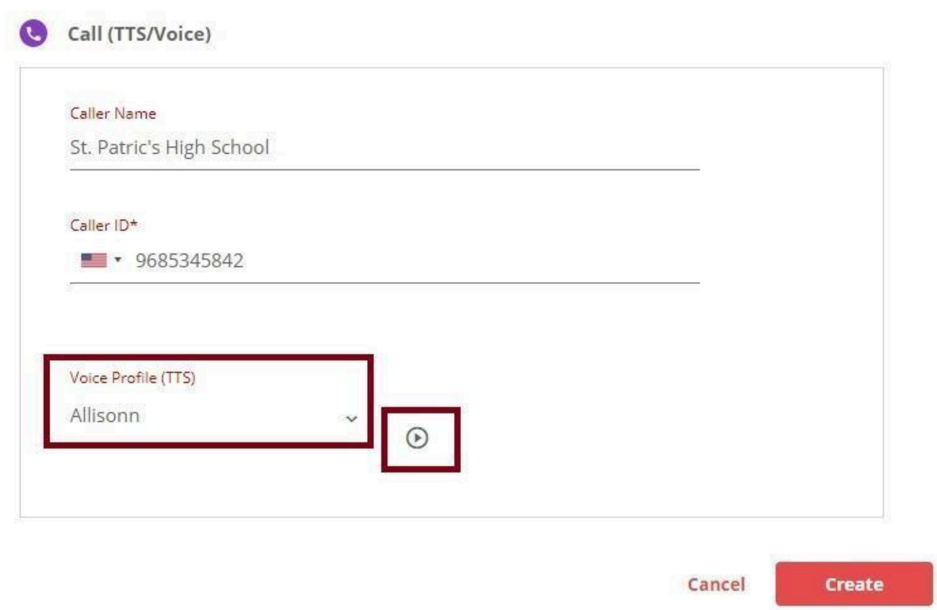
a. Enter the name to display as the caller in the **Caller Name** field.

b. Enter the number in the **Caller ID** field.

All the calls made from this sender profile display this name and number.

c. Select a voice from the **Voice Profile** field. The system converts the text into the chosen voice when sending a call (TTS/Voice) message. See the topic Send Voice Messages (step 9).

d. You can click the play button to listen to each profile. See the following image:

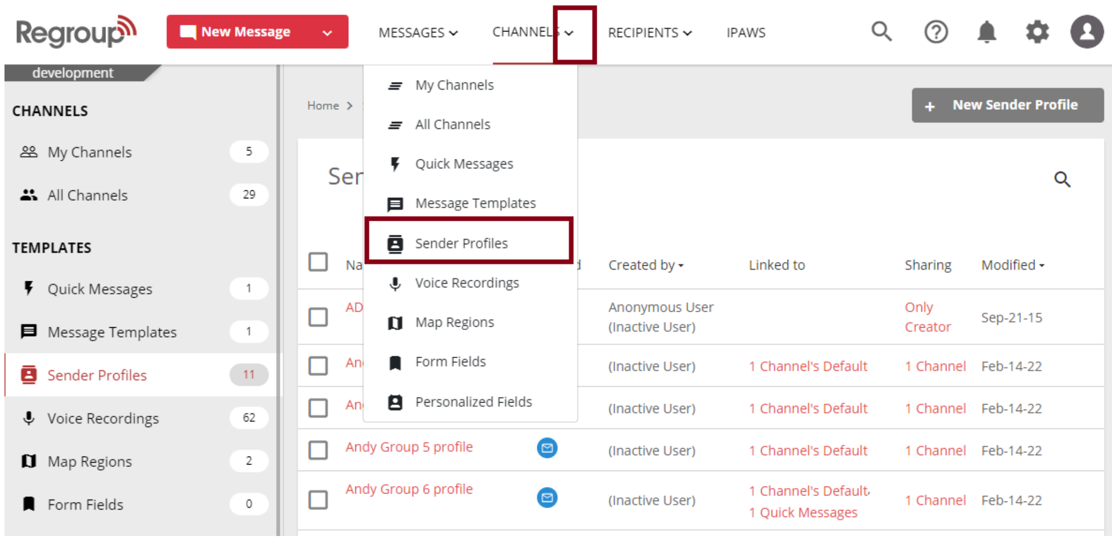


8. To determine who can use this sender profile, click one of the options from the Share with section:
    - **Only Me**: Do not share with anyone
    - **All Admins**: Share with all the admins in your organization. Click the **Modify** or **Delete** checkboxes to allow them to update or delete the sender profile.
    - **Select Groups, Channels, or Individual Admins**: Share with admins, groups, or channels. You must select the required groups, channels, and individual admins.
      Click the **Modify** or **Delete** checkboxes to allow them to update or delete the sender profile.
9. Click **Create**.
   You have now created a sender profile and shared it with the required admins, groups, or channels.

View and Update Existing Sender Profile

You can update any existing sender profiles for which you have Modify access. Here is how you view or update the existing sender profiles:

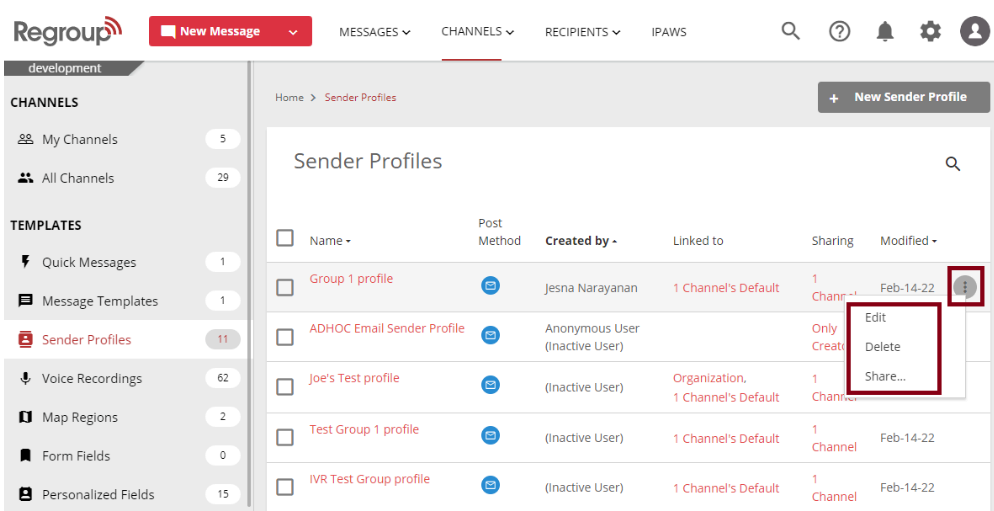
1. Click the **Channels** dropdown and select **Sender Profile**. See the following image:



The Sender Profiles page opens.

2. You can click the lens icon to search and locate the required sender profile.

3. Click the vertical ellipsis corresponding to a sender profile to update it. See the following image:



4. Click **Edit** to update the profile.

You can update the sender profile on the **Edit Sender Profile** page. To know more, see the topic [Create Sender Profiles](#).

5. You can click **Delete** and type **Yes** to confirm the deletion of the sender profile.

   Note: You cannot undo a sender profile deletion.

6. You can click **share** and change the share settings. Click one of the options from the Share with section:

   - **Only Me**: Do not share with anyone

   - **All Admins**: Share with all the admins in your organization. Click the **Modify** or **Delete** checkboxes to allow them to update or delete the sender profile.

   - **Select Groups, Channels, or Individual Admins**: Share with admins, groups, or channels. You must select the required groups, channels, and individual admins.

     Click the **Modify** or **Delete** checkboxes to allow them to update or delete the sender profile.

   Tip: You can update the share setting of the sender profiles you created.

7. Click **Save** to save your changes.

Setup (NOAA) Alert Triggers to a Channel

Regroup allows you to notify recipients with automated alerts from the National Weather Service (NWS) and National Oceanic Atmospheric Administration (NOAA). Regroup provides NOAA alerts as a premium add-on feature. When enabled, Regroup monitors all broadcasted NOAA alerts, filters them per your criteria, and automatically sends them through a selected channel.

The **Message Details** (Messages> Sent Messages> locate and open the message>Message Details) tab of your location-based NOAA alerts displayes a map. The map shows the polygon from NOAA that covers the address you enter as the alert location.

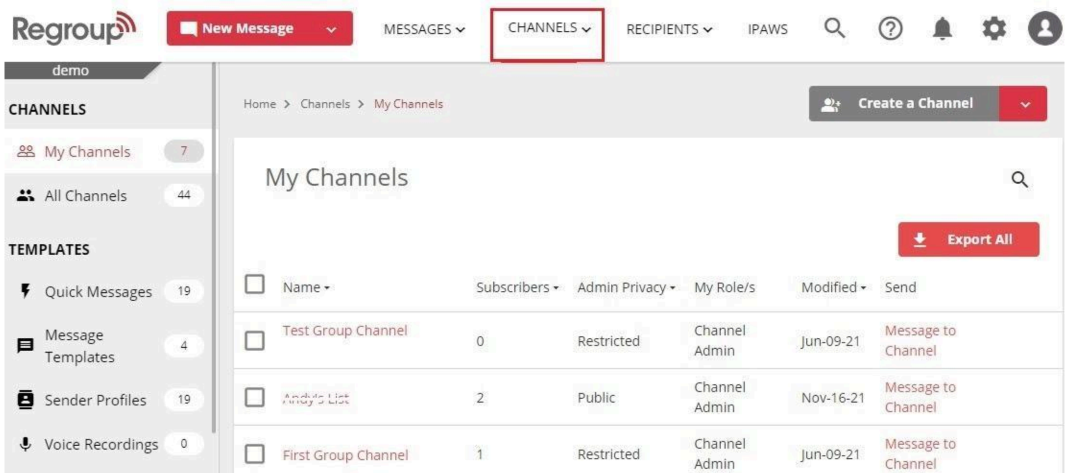
TIP: Automated NOAA alerts are sent without the admin's approval, even if approval is set for a channel. Contcts can also set up quiet hours for each event code.

To broadcast the alerts, you must enable the NOAA add-on and set up Alert Triggers in Regroup channels. While configuring alert triggers in a channel, you can set up filters based on Counties, Locations, Alert Types, or Events. Each channel can have only one combination of these filters. For a list of events NOAA offers, see Emergency Alert System (EAS) Event Codes.

Note: Regroup provides NOAA Alerts as a premium add-on. Contact Regroup to enable it.

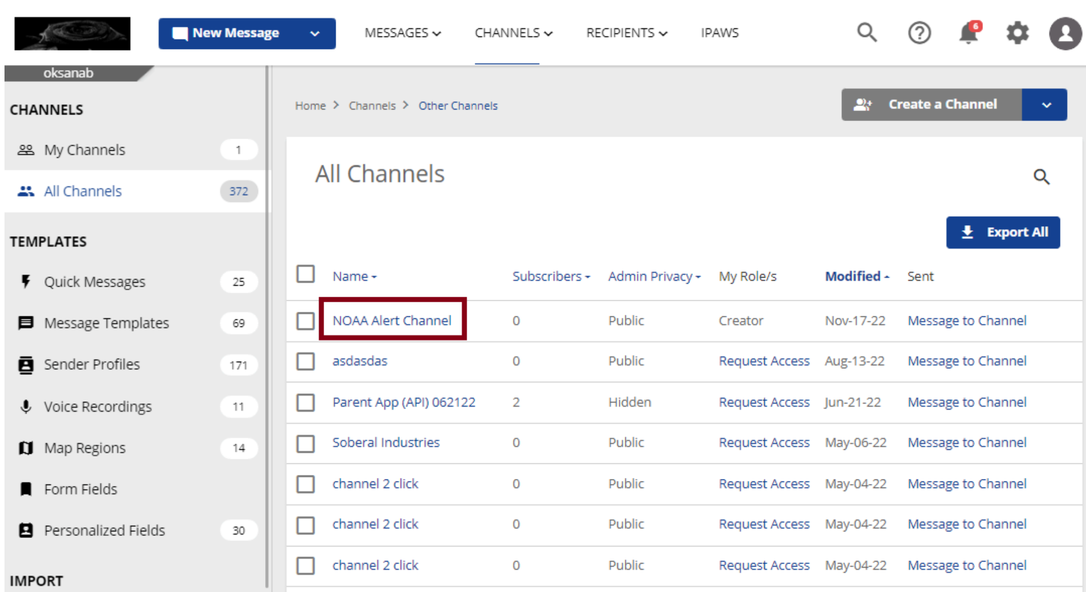
Here is how you configure Alert Triggers for a channel:

1. Click the **Channels** tab. See the following image:



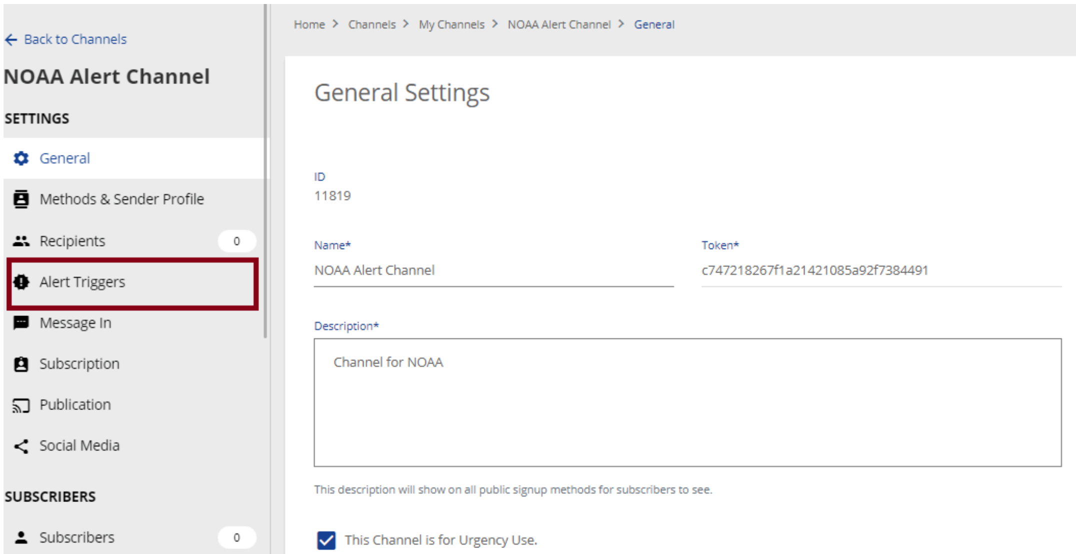
The My Channels page appears.

2. Search and locate the channel in the **My Channels** tab. The organization admins can edit channels on the **All Channels** tab too.
3. Click the name of the channel to open it. See the following image:



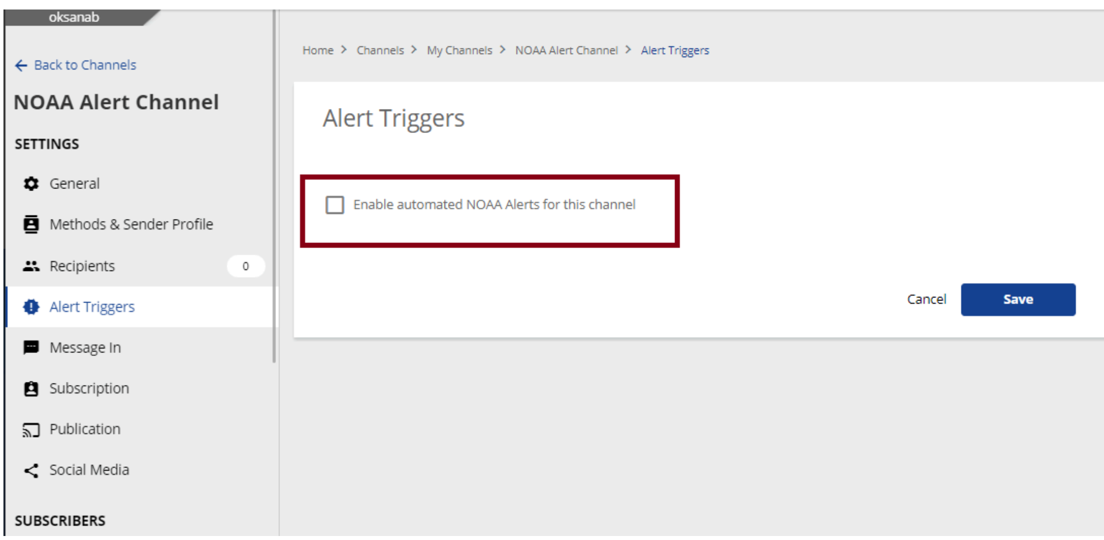
The **General Setting** page opens.

4. Click **Alert Triggers** on the left navigation panel. See the following image:



The Alert Triggers page appears.

5. Click **Enable automated NOAA Alerts for this channel** check box. See the following image:



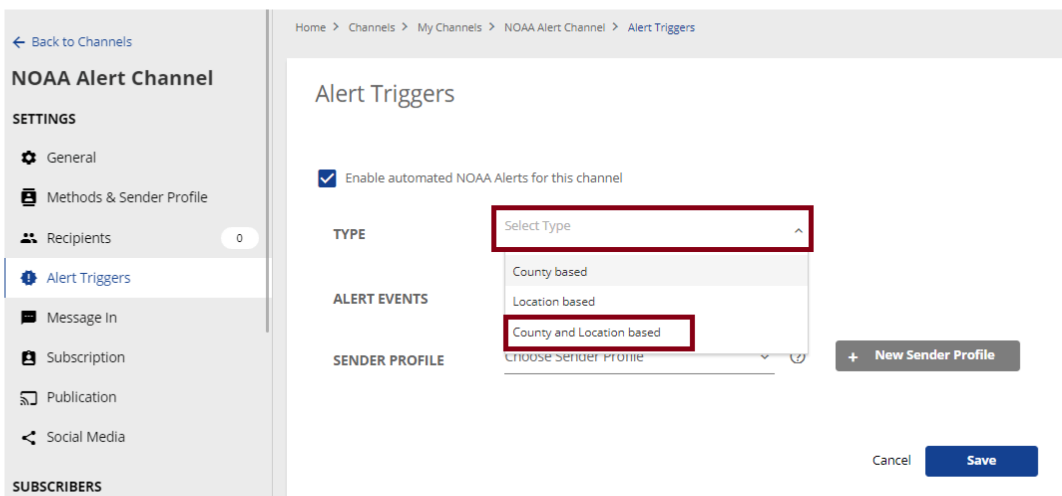
6. Click the **Type** dropdown and select a forecast area. The system filters all NOAA alerts with the forecast area you select from the following:

a. **County Based**: Alerts with the selected county get filtered to this channel. NOAA serves.

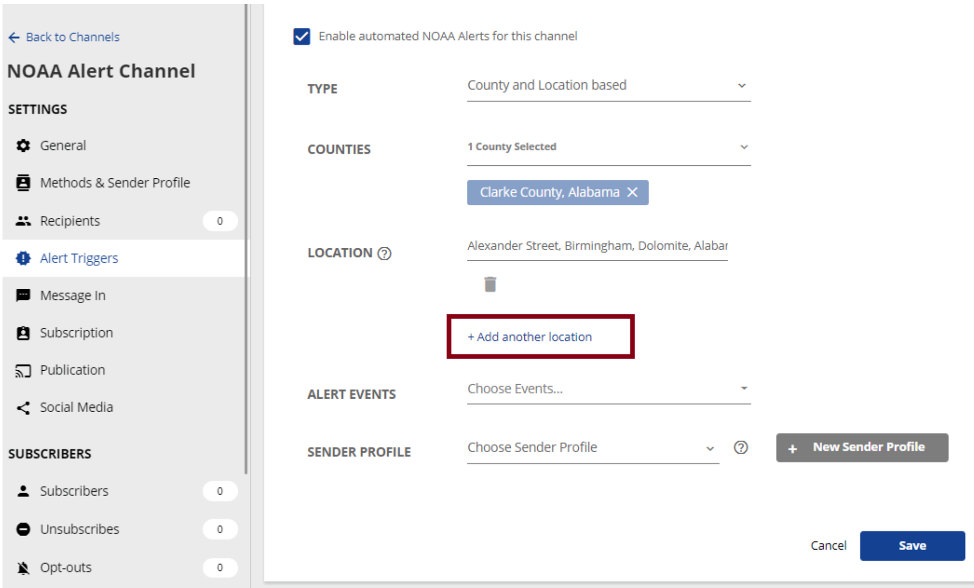
b. **Location Based**: Alerts with the location address you enter get filtered to this channel.

c. **County and Location Based**: Alerts with the selected county and location address get filtered to this channel.

The following image highlights the **Type** dropdown with **County and Location Based** selected.

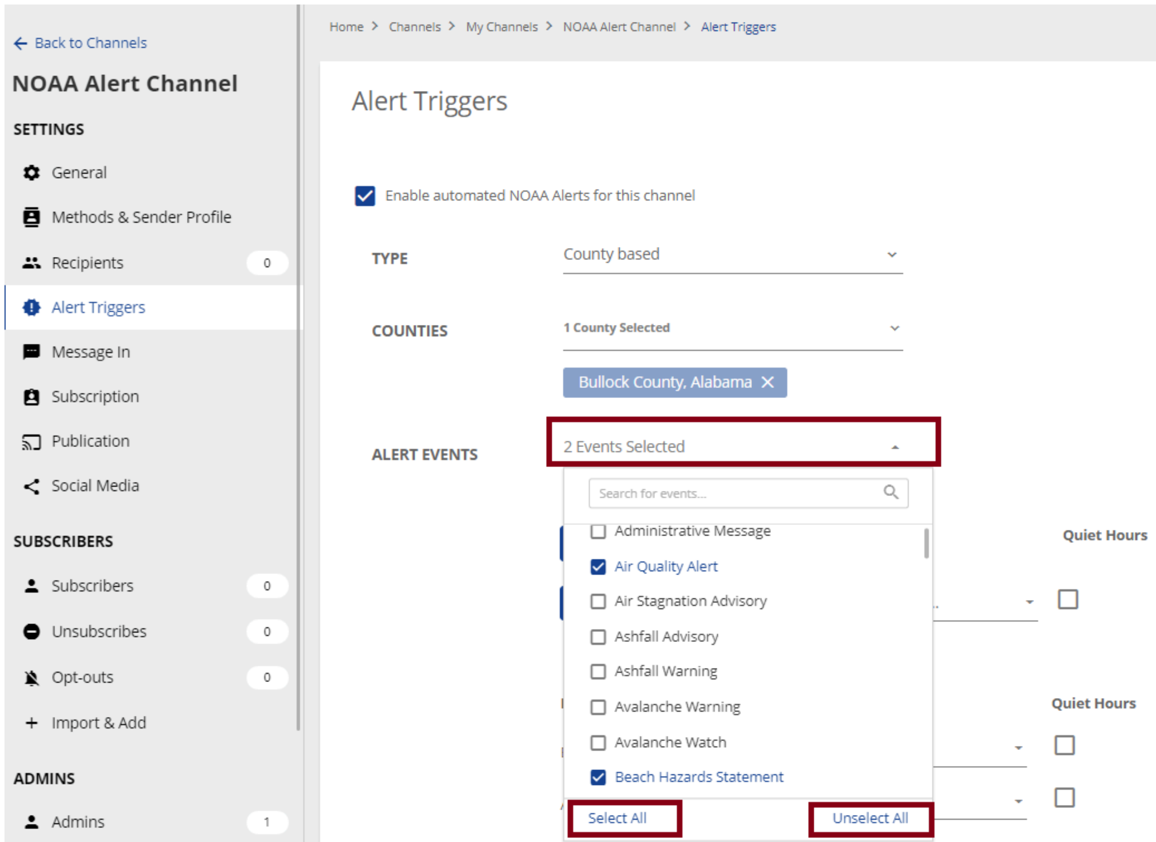


7. Select a county from the **Counties** dropdown and enter a physical address valid with the NOAA records in the **Location** field.
8. You can click **Add another location** to add more than one location. See the following image:



9. Click the **ALERT EVENTS** dropdown to select an event. See the event code here: NWRNWS Event Codes.

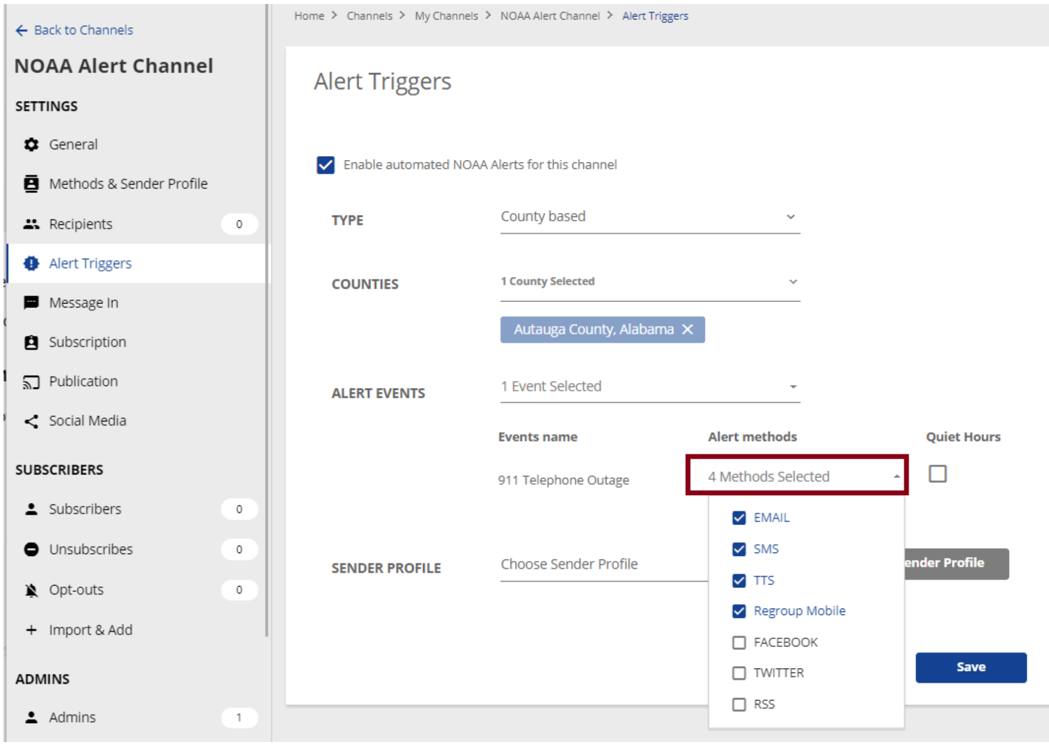
10. You can click **Select All** and **Unselect All** to select all events and deselect all the selections. See the following image:



Tip: You can select more than one **Alert Events**.

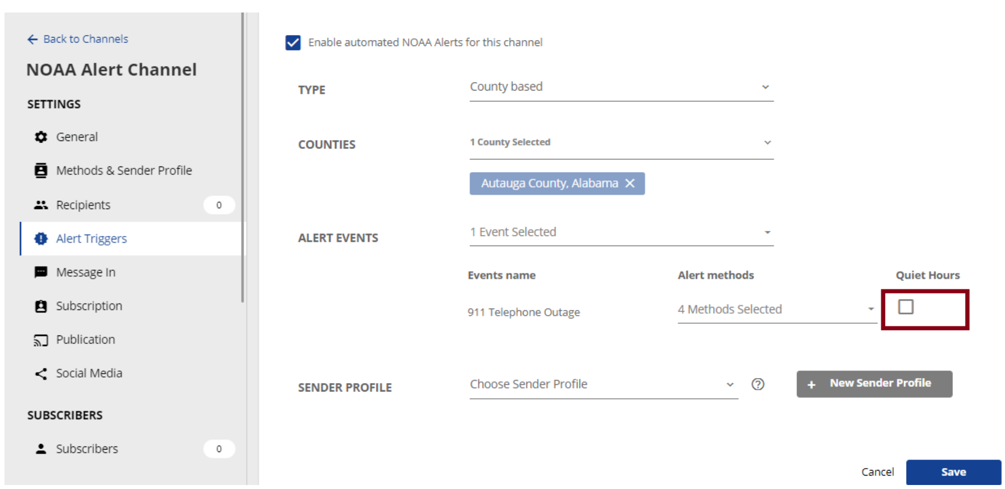
The alert method and Quiet Hours dropdown open.

11. Click the **Alert Methods** dropdown and select the required delivery method. See the following image:

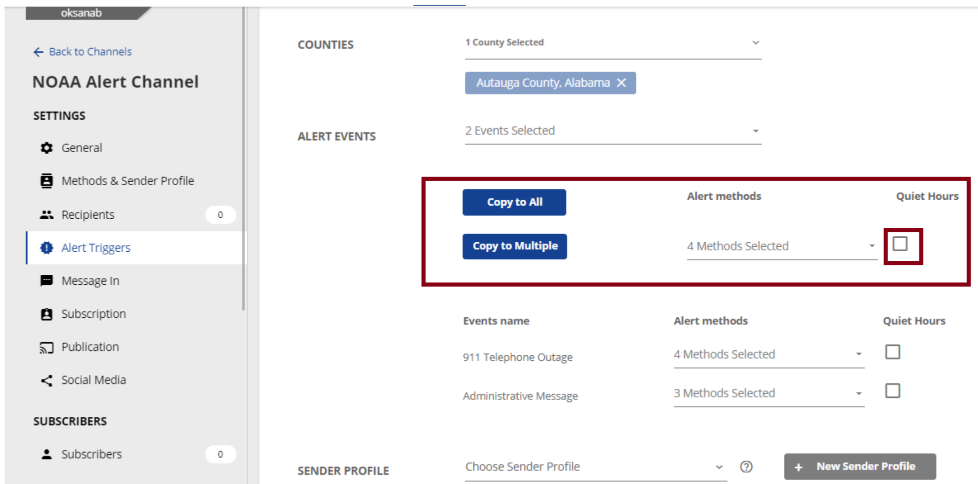


12. You can set up quiet hours for each chosen Alert Event:

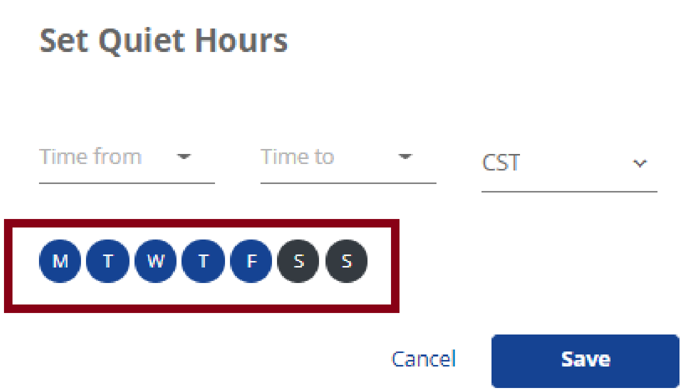
    a. Click **Quiet Hours** checkbox. See the following image:



b. If you choose multiple **Alert Events**, you can set quiet hours for the general **Alert Method** dropdown and copy the time to multiple events. See the following image:



c. Select the required days. The following image shows Sunday and Saturday selected:

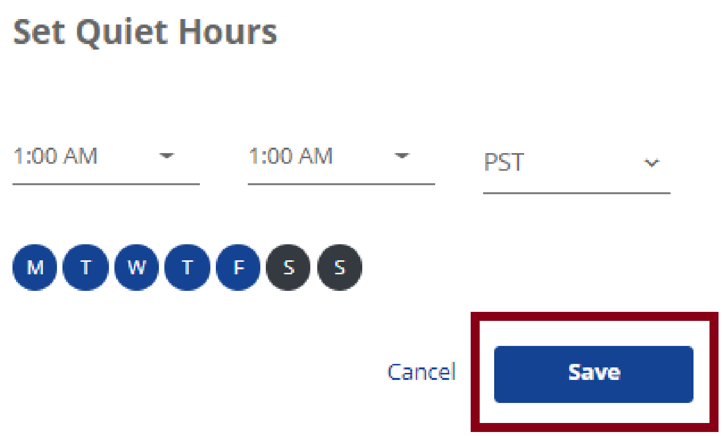


d. Click the **Time From** dropdown and move up or down to select the required time.

Tip: You can click on the time value in the dropdown to select time from a 12-hour chart.

e. Click the **Time To** dropdown and select the required time.

f. Click the time zone dropdown and select the required time. See the following image:



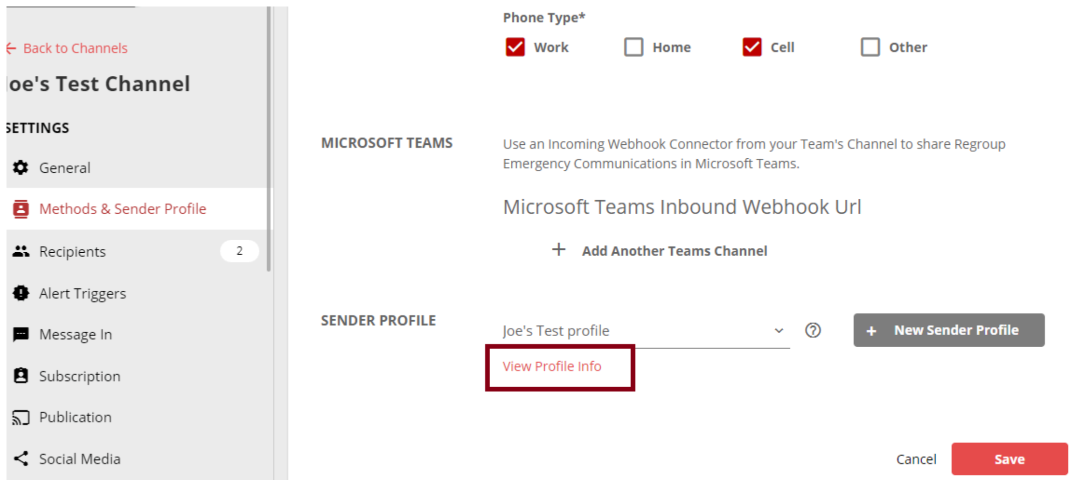
g. Click **Save**.

13. To determine what information appears as the message's sender:

a. Click the **Choose Sender Profile** dropdown and select an existing sender profile.

Tip: You can only view and select the sender profiles shared with you, the channel, or all admins.

b. You can click **View Profile Info** to see the details of the selected profile. See the following image:



c. You can create a new sender profile by clicking the **New Sender Profile** button. The **New Sender Profile** page opens. See the topic [Create Sender Profiles](), step 3 onwards, to create a new sender profile.

14. Click **Save**.

Setup Message In (Email In) to Send Channel Messages

You can use the Message In feature to send messages to all channel contacts by sending a message to the channel.

Note: SMS Text-in & TipSafe is a paid add-on. Contact Regroup to enable it.

You can configure message-in as the following:

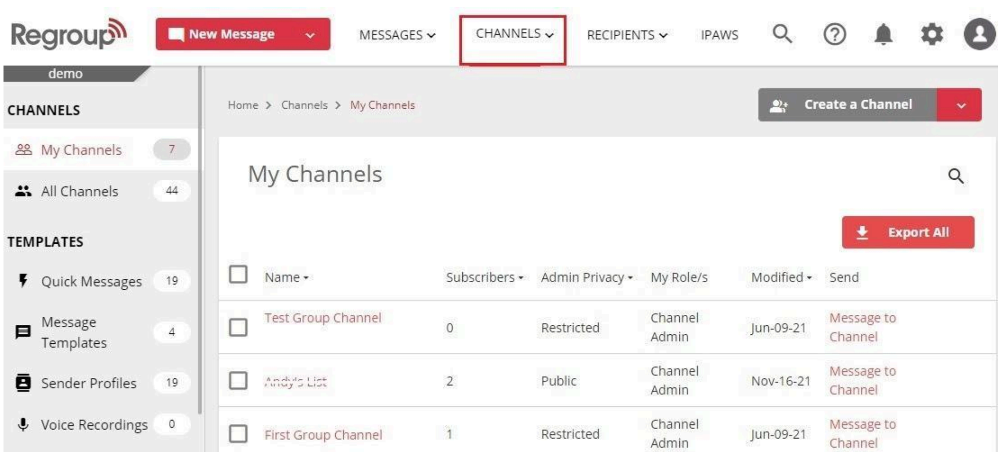
- **Email In**: Send an email to the channel's mail ID to send a message to all channel contacts.

- **SMS/Text In (Tipsafe)**: Send an SMS to the channel DID to trigger a message to all channel contacts. Contact Regroup to obtain the channel DID.

You can also configure the Message In to send messages on the move or to set up anonymous polling. You can also determine who can send emails to the channel.

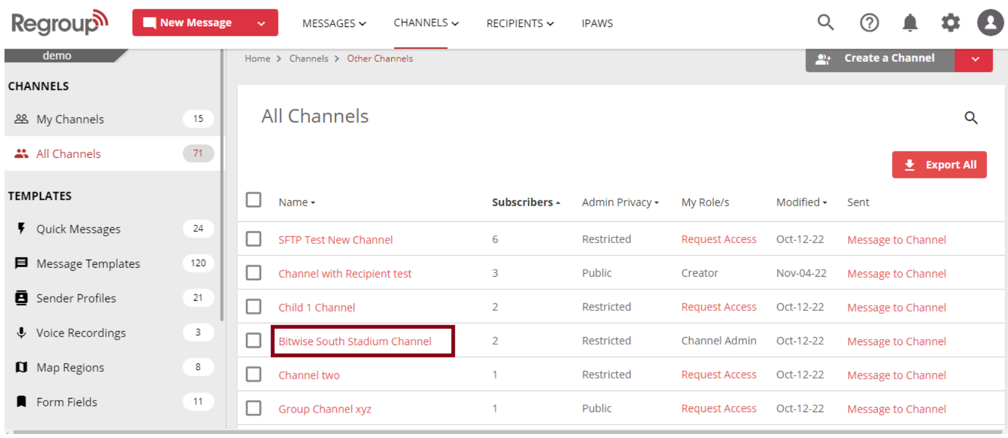
Here is how you configure the Message In:

1. Click the **Channels** tab. See the following image:



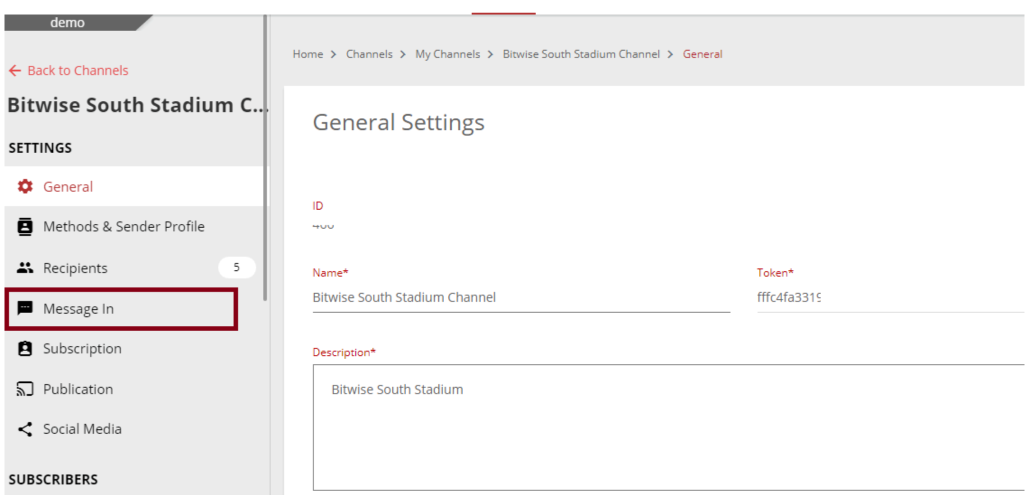
   The My Channels page appears.

2. Search and locate the channel in the **My Channels** tab. The organization admins can edit channels on the **All Channels** tab too.
3. Click the name of the channel to open it. See the following image:



The **General Setting** page opens.

4. Click **Message In** on the left navigation panel. See the following image:

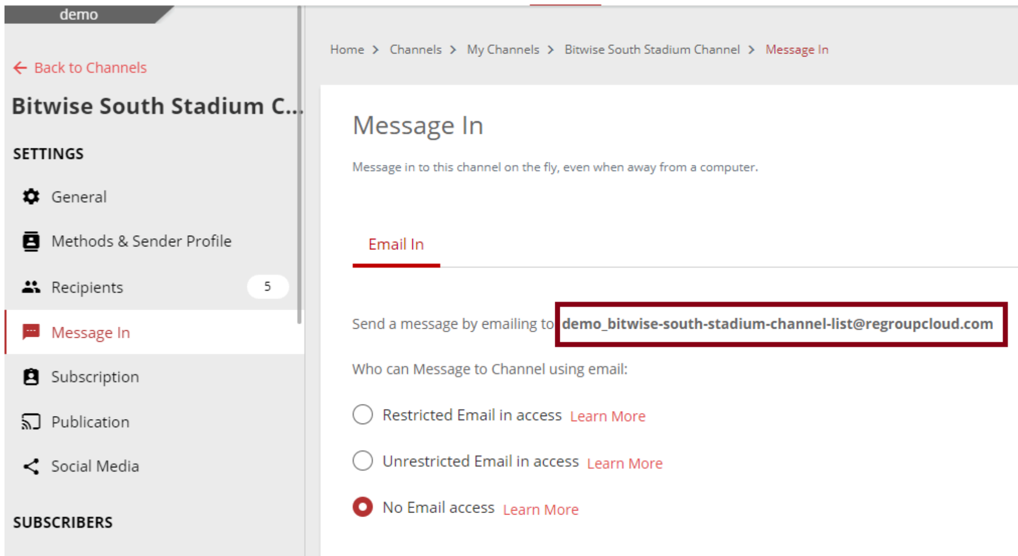


The Message In page opens with Email In and SMS/Text In tabs.

5. Click the **Email In** or **SMS/Text In** tab. By default, the Email In tab is selected.

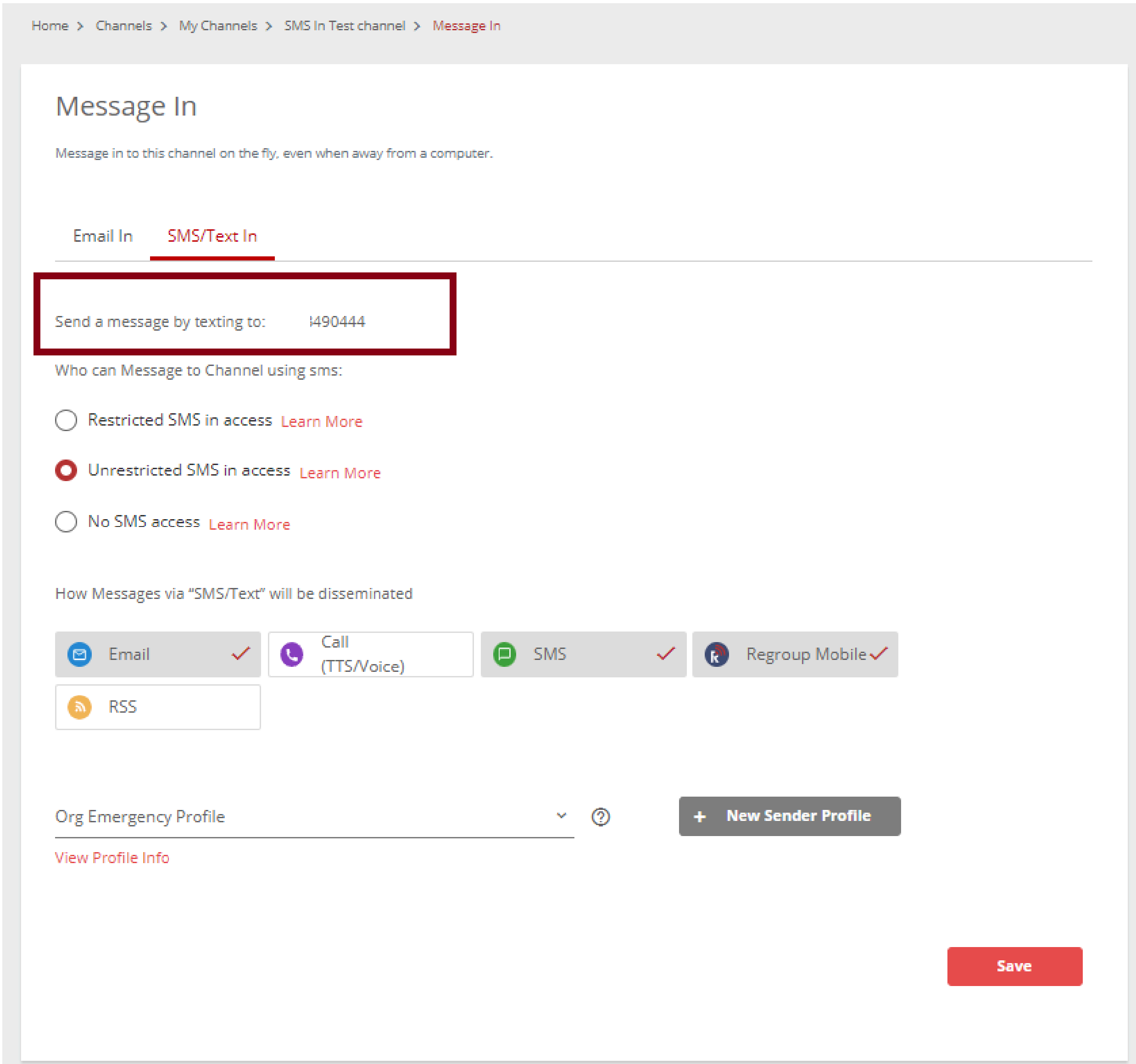
   Note: The following procedure shows setting up Email In; you can use the same to configure the **SMS/Text In** as well.

6. Copy the email address provided under the **Email In** tab. See the following image:


demo
Back to Channels
Bitwise South Stadium C...
SETTINGS
General
Methods & Sender Profile
Recipients
5
Message In
Subscription
Publication
Social Media
SUBSCRIBERS
Home > Channels > My Channels > Bitwise South Stadium Channel > Message In
Message In
Message in to this channel on the fly, even when away from a computer.
Email In
Send a message by emailing to demo_bitwise-south-stadium-channel-list@regroupcloud.com
Who can Message to Channel using email:
Restricted Email in access Learn More
Unrestricted Email in access Learn More
No Email access Learn More

Note: contact Regroup to avail the Channel DID to configure the SMS/Text In.

See the following image for **SMS/Text In**:



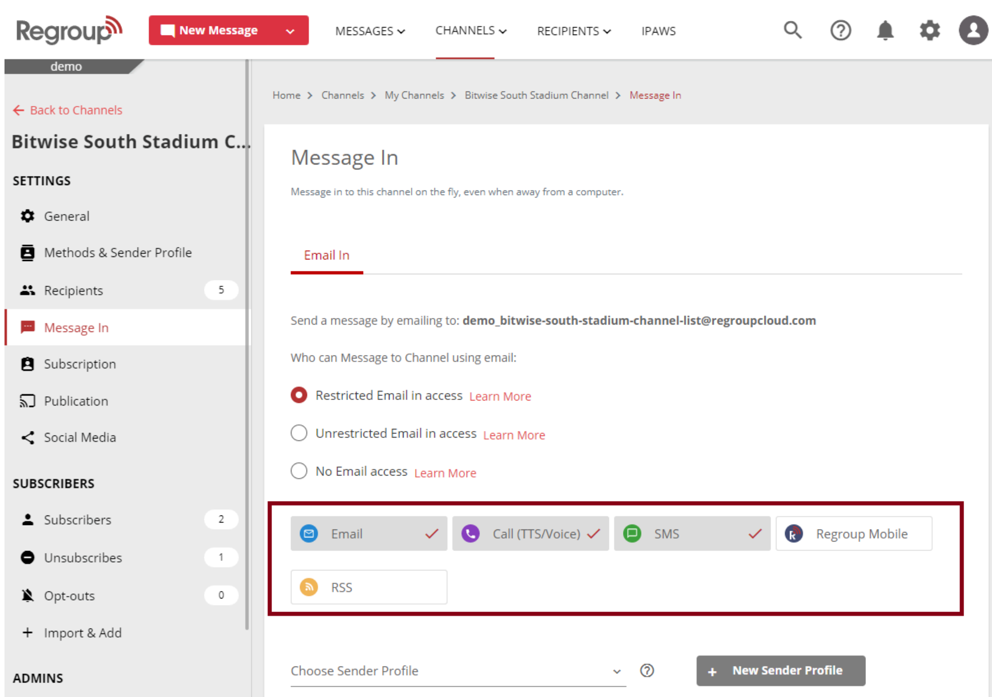
7. Click to select one **Email Access** option to determine who can message this channel's contacts by emailing the channel mail ID:

    - **Restricted Email in access**: Only the channel admins who have access to send messages to this channel can send messages using the channel mail ID.

- **Unrestricted Email in access**: Any contact or admin in the channel can message the channel contacts using the channel mail ID.

  Tip: You can use unrestricted access for anonymous reporting. It's advised not to use it for sending Urgency or Routine Messages. Also, you must not use the unrestricted channel email address as the sender profile.
- **No Email access**: Nobody in this channel can send messages using the channel mail ID

8. Click and select the required delivery methods. The system triggers messages in the selected delivery methods when you send mail to the channel's mail ID. See the following image:



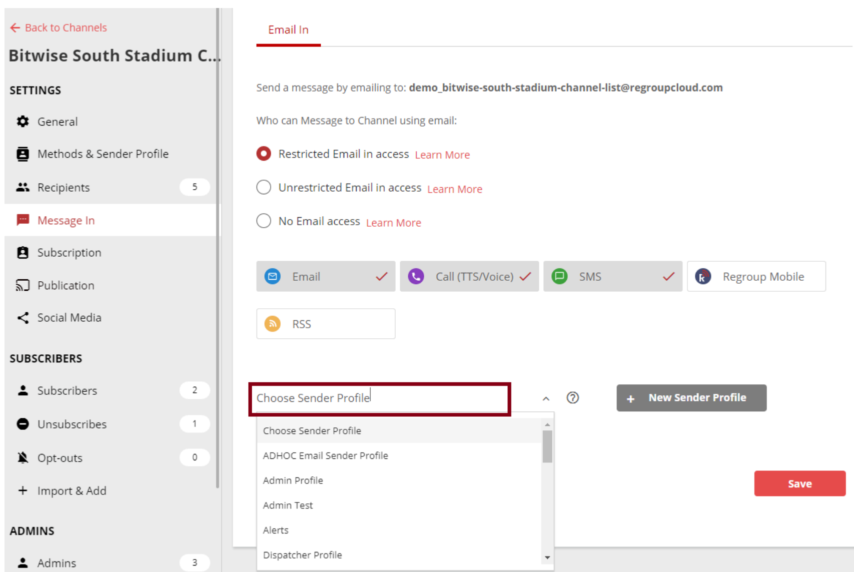
Note: It's mandatory to select a delivery method to send the messages you trigger using Email In or SMS In.

9. To determine what information appears as the message's sender:

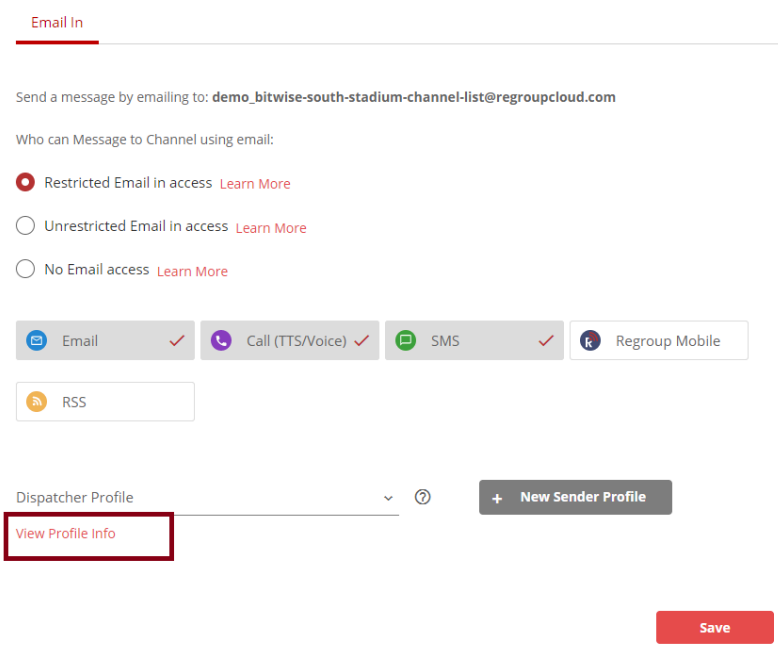
    a. Click the **Choose Sender Profile** dropdown and select an existing sender profile.

    Tip: You can only view and select the sender profiles shared with you, the channel, or all admins.

    See the following image:



b. You can click **View Profile Info** to see the details of the selected profile. See the following image:



c. You can create a new sender profile by clicking the **New Sender Profile** button. The **New Sender Profile** page opens. See the topic Create Sender Profiles, step 3 onwards, to create a new sender profile.

10. Click **Save** to save your message in settings.

Enable RSS Publications from Channel or Group

You can use RSS (Really Simple Syndication) publication to publish messages from channels. RSS is an XML-based data format standard for exchanging alert data among many different technologies and systems.

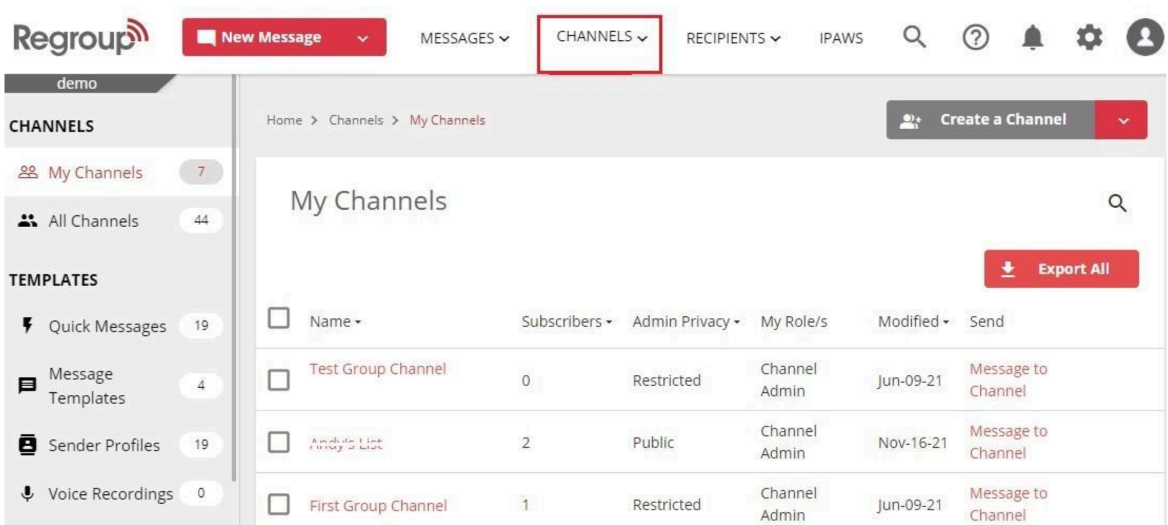
Note: RSS is a premium add-on. You must contact Regroup to enable it.

After you enable the RSS add-ons, you must **enable RSS publication** in an existing or new channel or group. You use this channel or group to send RSS alerts. To create a new channel, see the topic Create Channels Manually.

Tip: You must choose RSS as the delivery method to send desktop alerts from the channel. If you create a dedicated channel or group to send RSS feeds, you can select RSS as their default delivery method.

Here is how you enable RSS publication on a channel. You can use the same process flow to enable the RSS feed on the groups:

1. Click the **Channels** tab. The following is the channels tab:



   The My Channels page appears.

   For groups, navigate to **Recipients**> **My Groups** or **All Groups.**

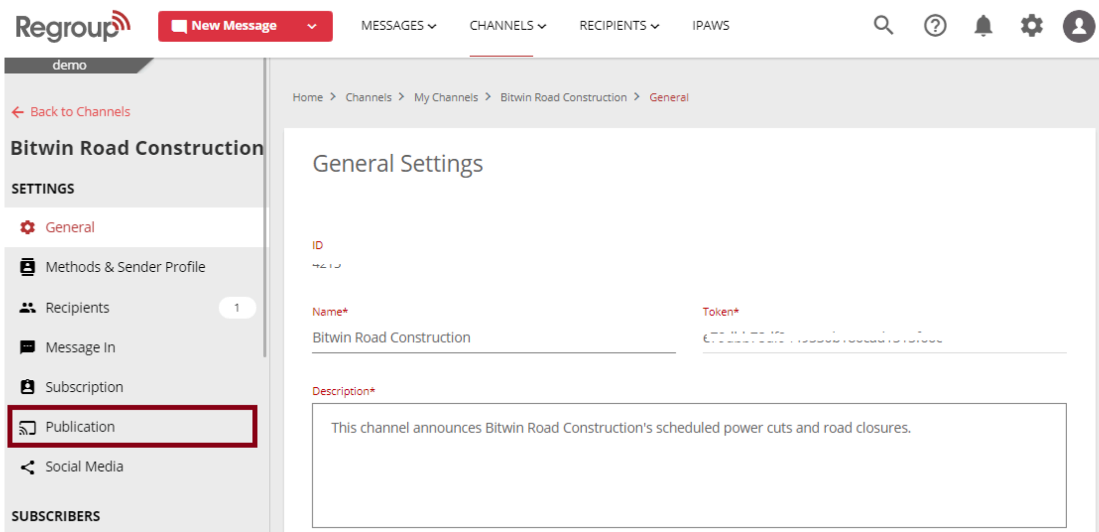
2. Locate the required channel on the **My Channels** page.

   Tip: The organization admins can enable RSS publication in channels on the **All Channels** tab.

3. Click the channel's name to open it.

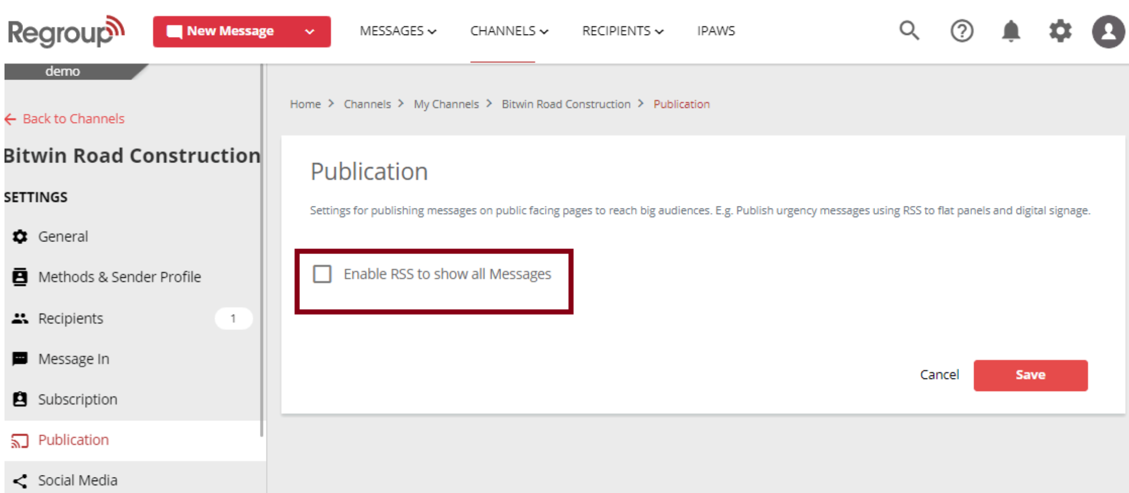
   The General Setting page opens.

4. Click the **Publication** tab, under the settings, on the left navigation panel. See the following image:



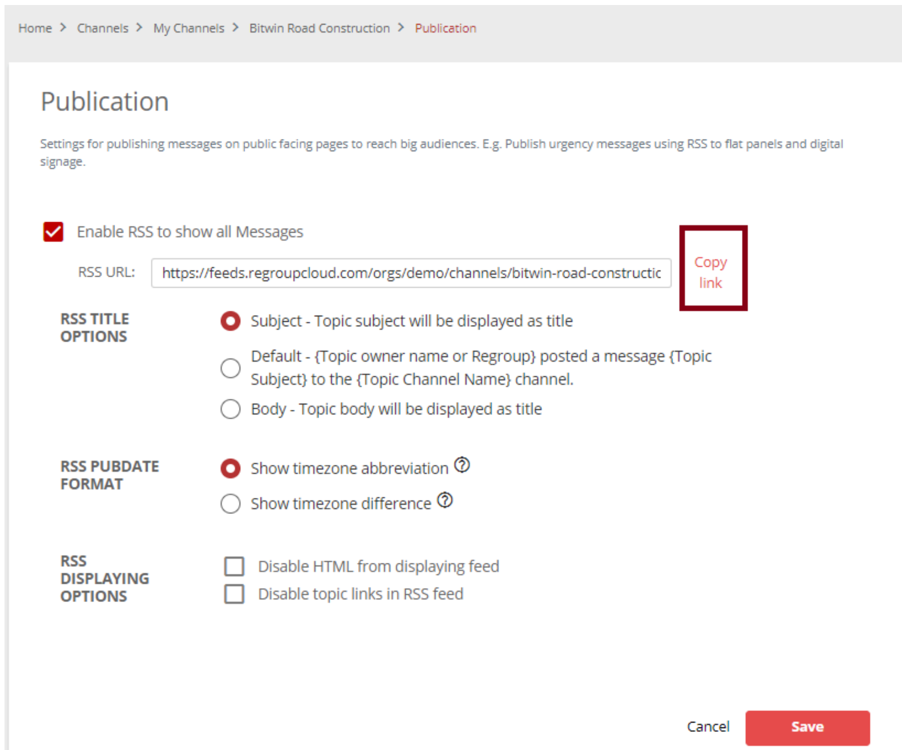
   The publication page opens.

5. Click the **Enable RSS to show all Messages** check box. See the following image:



   The RSS publication setting opens.

6. You can click **Copy Link** to link this channel's RSS feed with the desktop alerts application or any other public-facing page. See the following image:

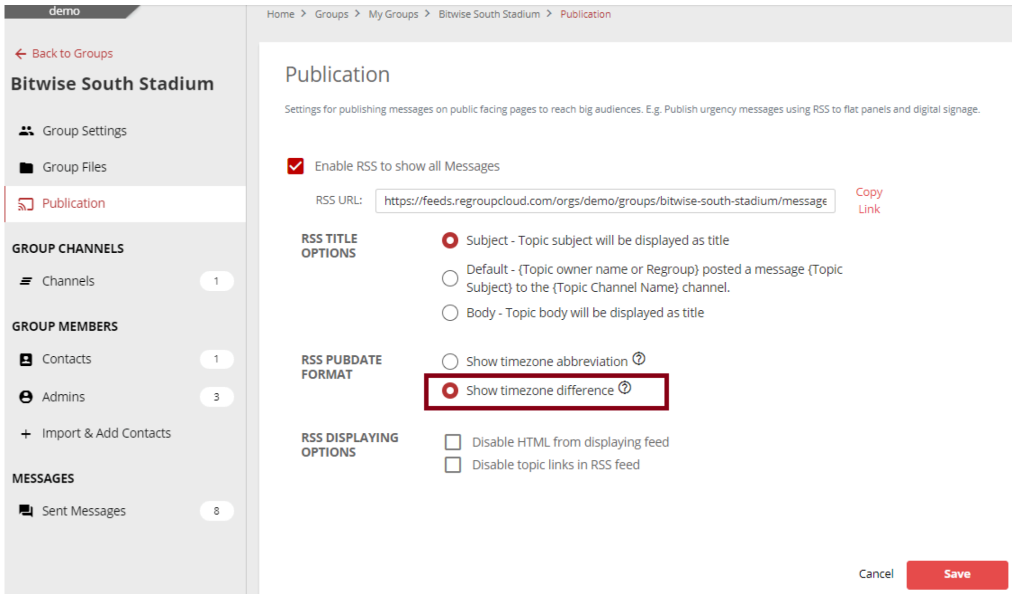


Note: You must provide this link to the Regroup support team to create an inbound RSS feed to this channel in the desktop alert application. You can also use this link to publish your channel content on the organization's web page.

7. In the **RSS TITLE OPTIONS** section, click and select the following:
    - **Subject** - The message subject appears as the RSS feed title.
    - **Default** - {Topic owner name or Regroup} posted a message {Topic Subject} to the {Topic Channel Name} channel appears as the title.

- **Body** - The message body appears as the RSS feed title.

8. In the **RSS PUBDATE FORMAT** section, click and select the **Show timezone difference**. See the following image:



Note: It's mandatory to select the **Show timezone difference** option to send the desktop alerts.

9. In the **RSS DISPLAYING OPTIONS** section, click and select the following to
   - **Disable HTML from displaying feed**: This prevents HTML code from appearing on the RSS feed.
   - **Disable topic links in RSS feed**: This prevents link tags from appearing on the RSS feed.
10. Click **Save**.

Note: When the RSS feed is set up for the channel or group, you must contact Regroup to create a desktop alerts user, inbound RSS feed, and provide you with the user credentials.

Setup Social Media

Social Media Preferences: Overview

Configure Social Media Preferences

Add Recipients to Channel

Add Recipients to Channel: Overview

You create channels to meet a specific communication need. The recipients of a channel can be groups, contacts within a particular location, or contacts.

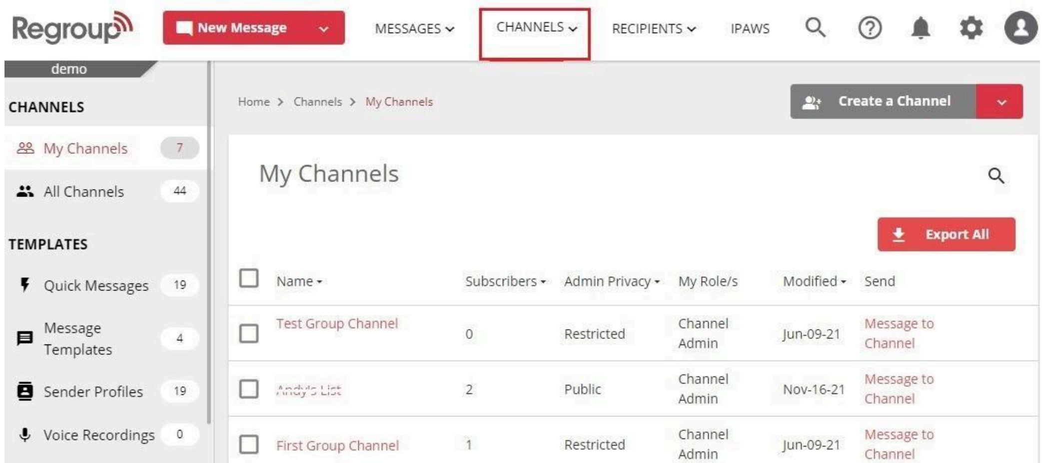
You can add recipients to the channel as follows:

- Add Contacts and Groups as Recipients to a Channel
- Locate and Add Channel Recipient Using Map.

Add Contacts and Groups as Recipients to a Channel

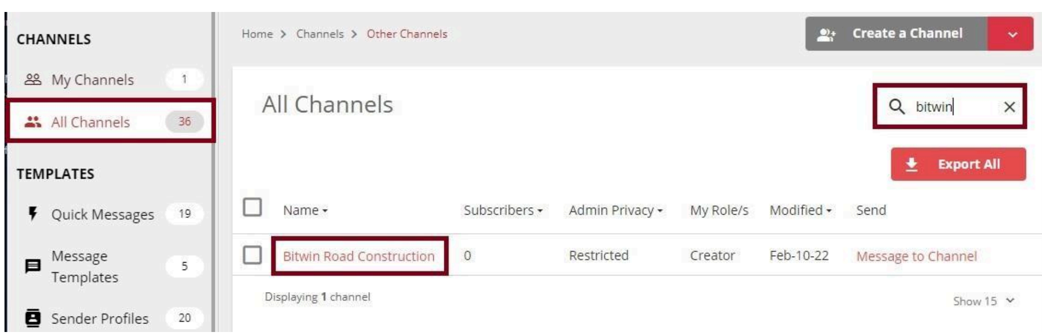
Here is how you add groups and individuals as recipients to the channel:

1. Click the **Channels** tab. See the following image:



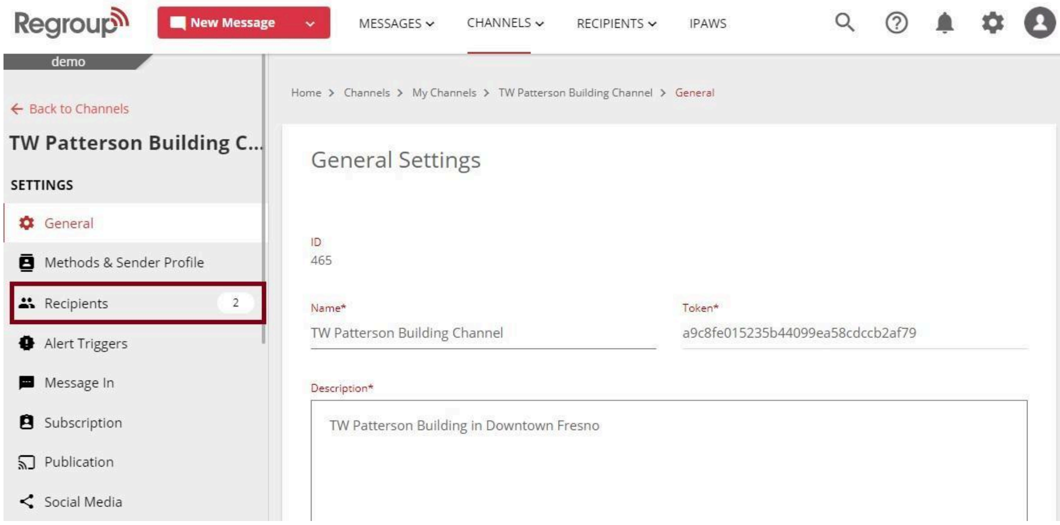
My Channels page opens.

2. Click the lens icon to search and locate the channel to add recipients. The organization admins can add recipients to the channels in the **All Channels** tab.
3. Click the channel name to open it. See the following image:



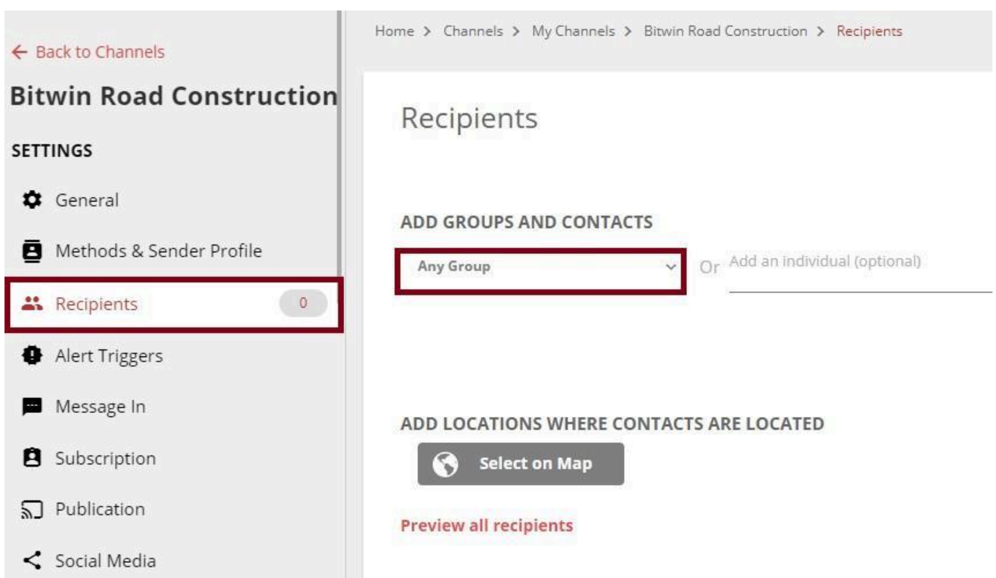
The **General Setting** page opens.

4. Click the **Recipients** tab on the left navigation panel. See the following image:



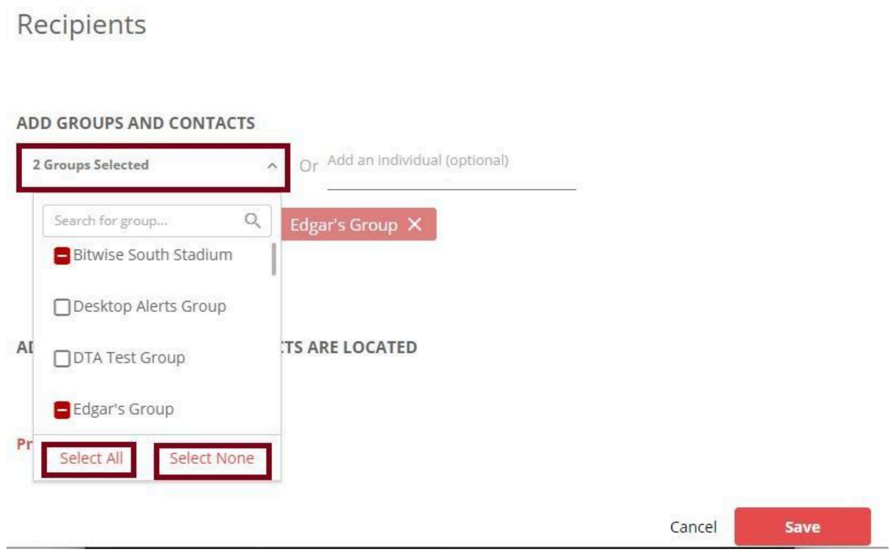
5. To add groups as recipients:

    a. Click **Add a Group** dropdown. See the following image:



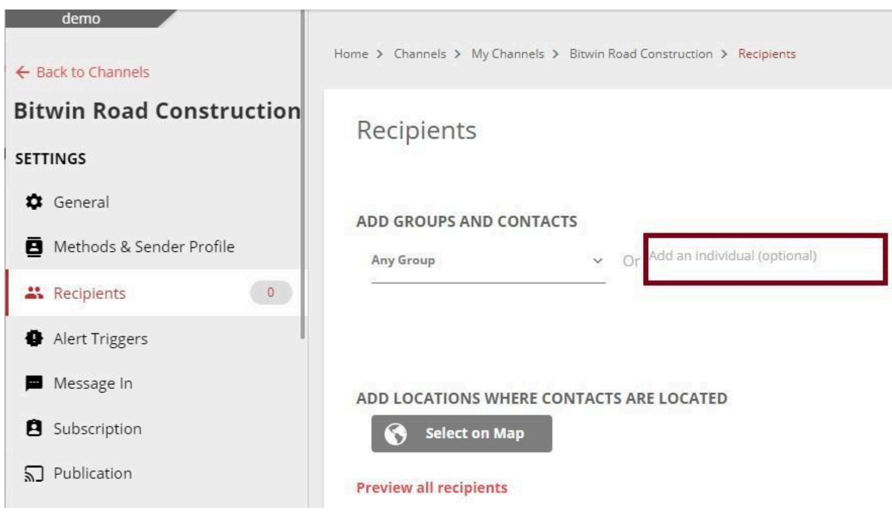
    b. Enter the required group name in the **Search for group** field and select them from the dropdown.

c. You can click **Select All** to select all the groups and **Select None** to deselect all. See the following image.



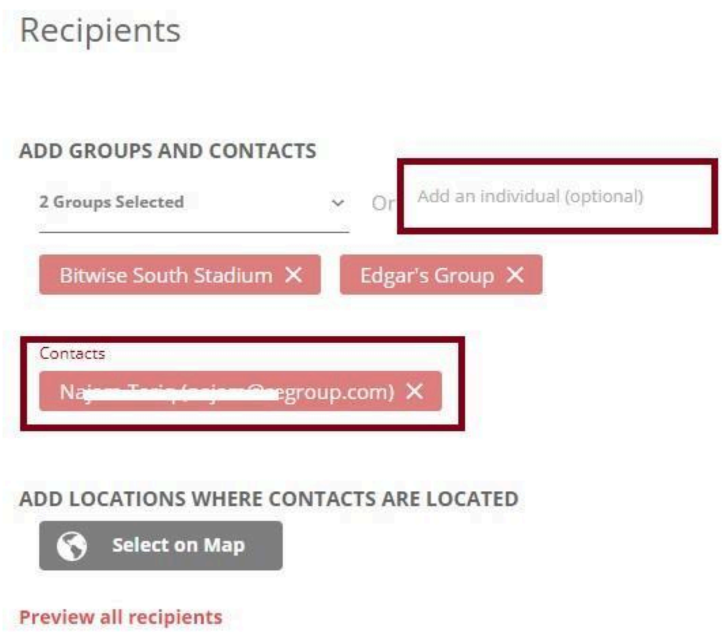
6. **To add individuals as recipients**,

a. Click the **Add an individual** dropdown. See the following image:



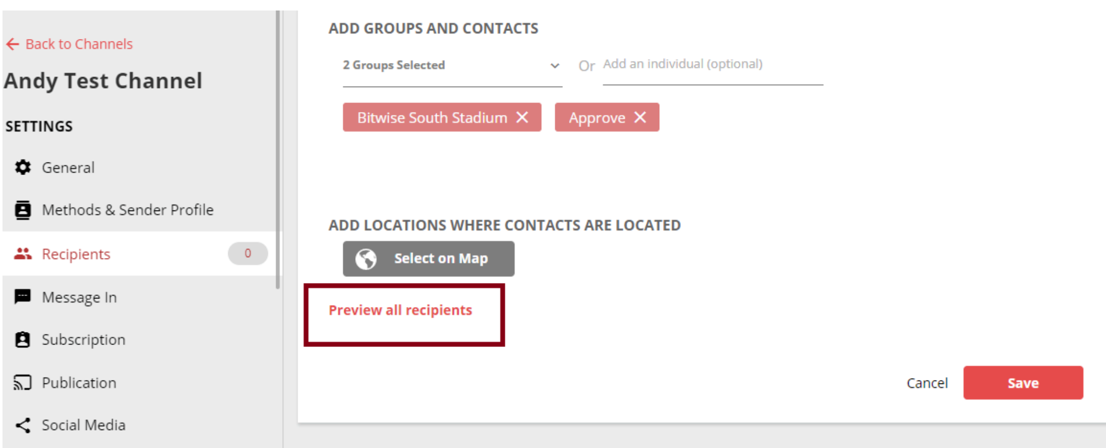
b. Enter the name or email address to search and add the individuals.

c. Click the name to add the contact. The following image highlights the add an individual dropdown and an already added contact:



7. To add recipients from a map location, see the topic: [Locate Contacts on the Map and Add as Channel Recipient]().

8. You can click **Preview all recipients** to view the contacts selected. See the following image:



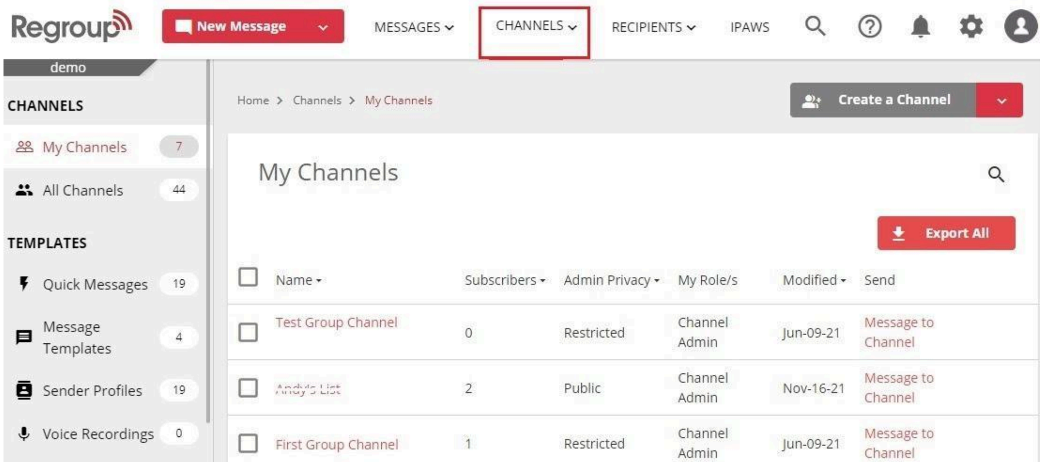
9. Click **Save**.

All the contacts you selected get added to the recipient tab of the channel.

Locate and Add Channel Recipient Using Map

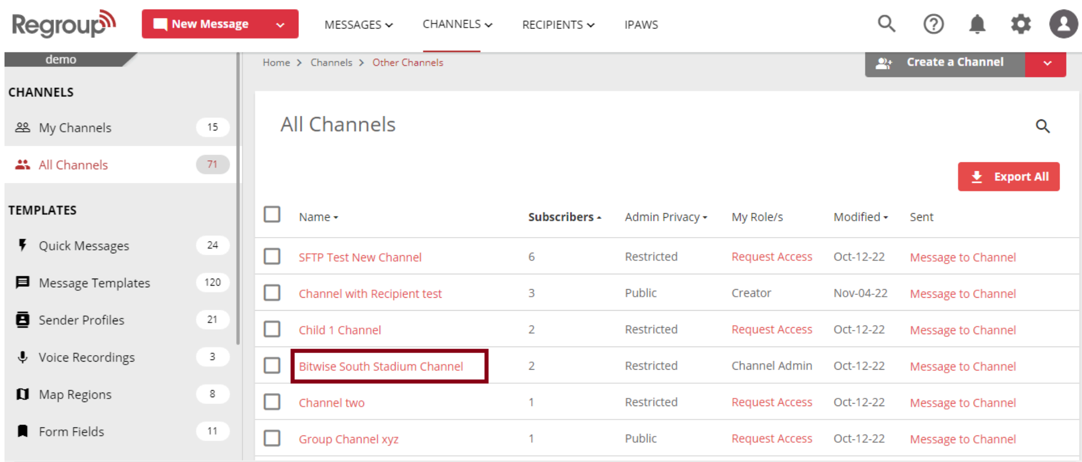
You can add contacts to a channel based on their profile address. Here is how you locate contacts on the map and add them as recipients to a channel:

1. Click the **Channels** tab. See the following image:



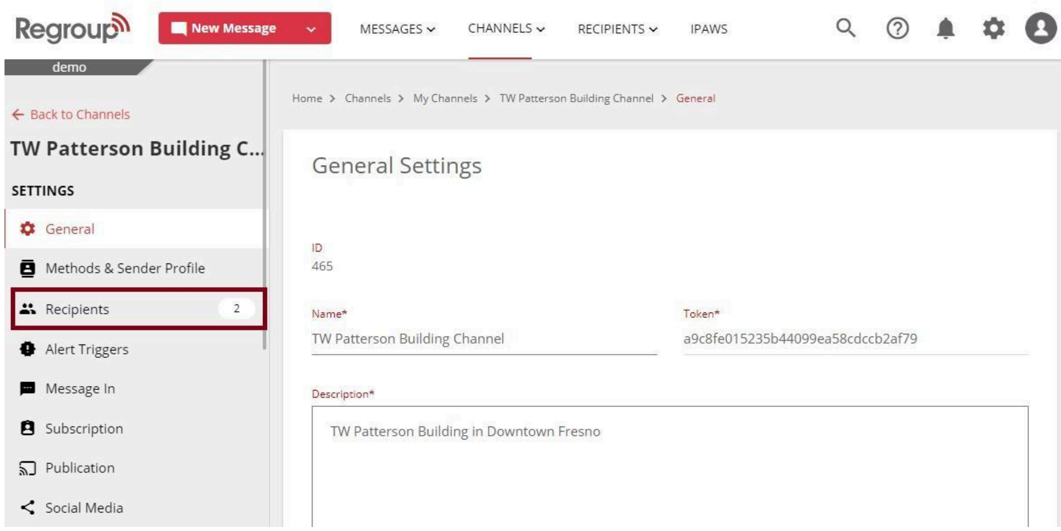
   My Channels page opens.

2. Click the lens icon to search and locate the channel to add recipients. The organization admins can add recipients to the channels on the **All Channels** tab.
3. Click the channel's name to open it. See the following image:

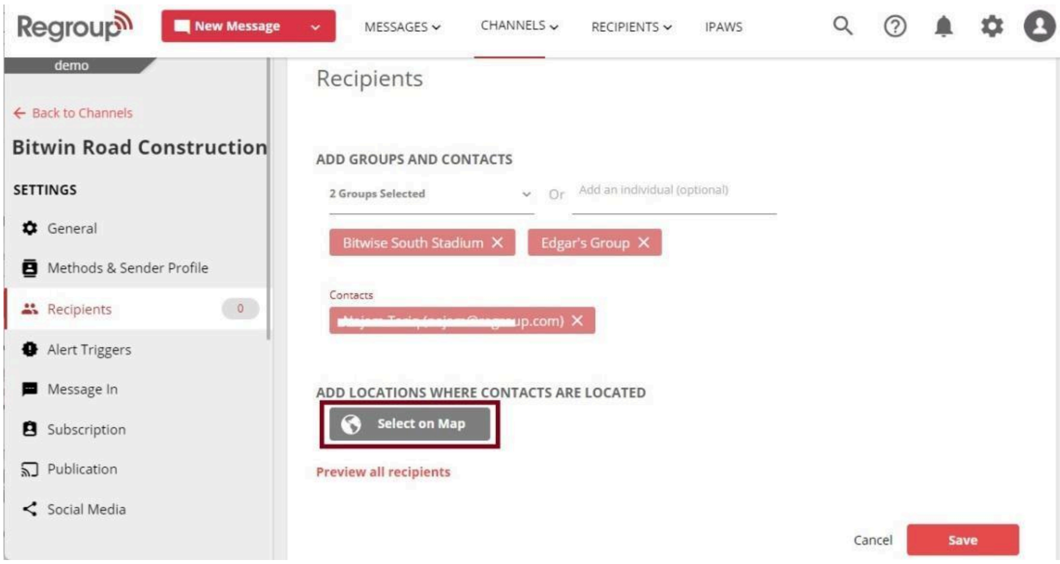


The **General Setting** page opens.

4. Click the **Recipients** tab on the left navigation panel. See the following image:



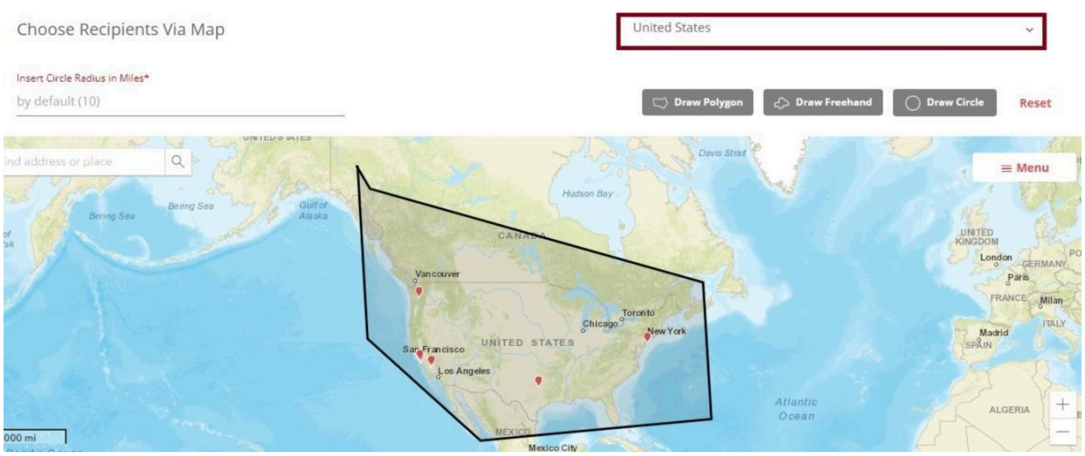
5. Click the **Select on Map** button to add recipients from a map location. See the following image:



The Choose Recipient via Map page opens.

6. Enter the location in the **Select Map** field to choose a previously saved location. See the topic, Setup Map Region, to create the map region.

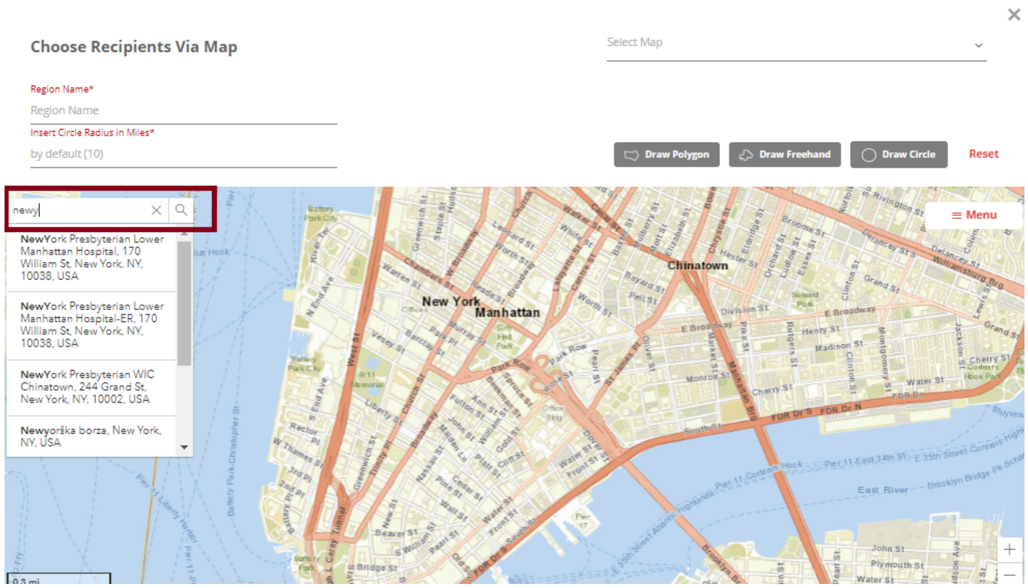
   See the following image:



The map area gets adjusted with the chosen location. All the contacts located in that location get listed below.

7. To draw the location on the map:

a. Click the **Find Address or Place** field to search for the required location. See the following image:

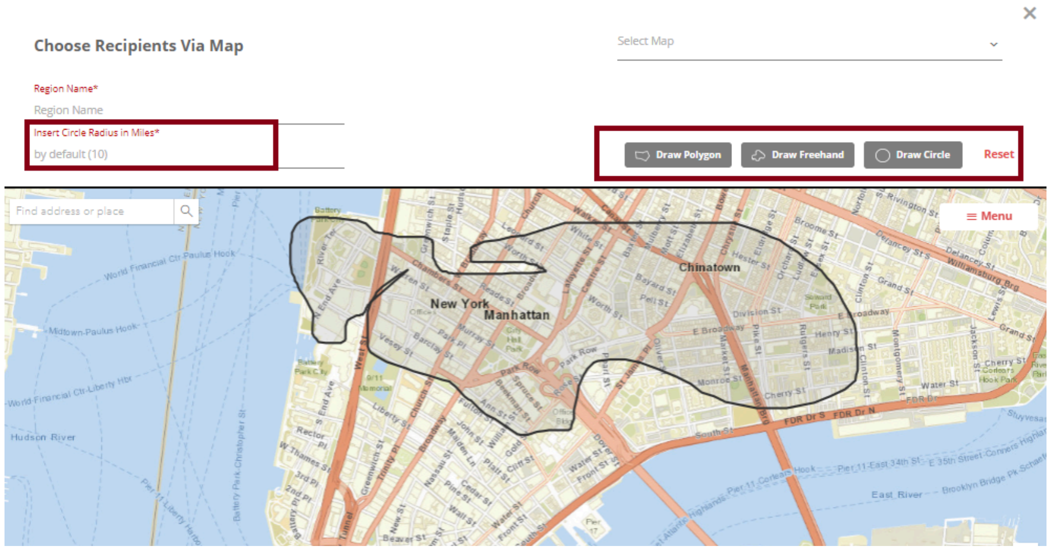


b. Click the draw options and click the map as follows:

- **Draw Polygon**: click at a point on the map and repeat clicking at locations that mark the edge of the polygon.
- **Draw Freehand**: Click and hold the cursor to draw the required shape.
- **Draw Circle**: Enter a value in miles in the **Insert Circle Radius in Miles** field > click on a point in the map that marks the circle's center.

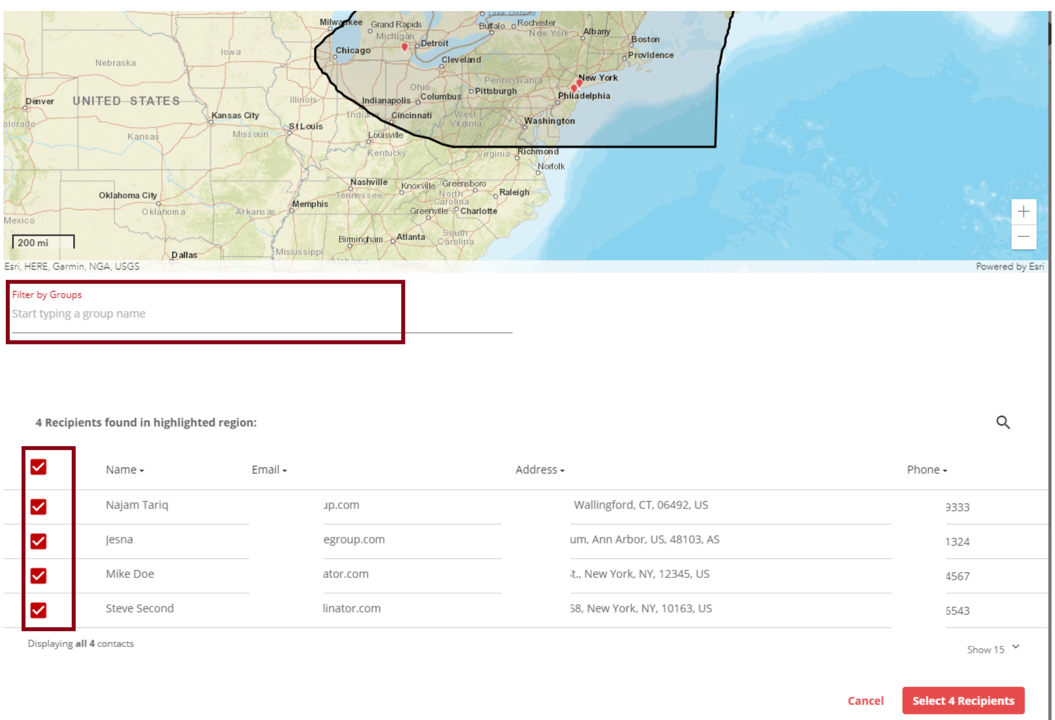
c. You can click Reset to redraw the location.

The following image highlights draw options and insert circle radius field:



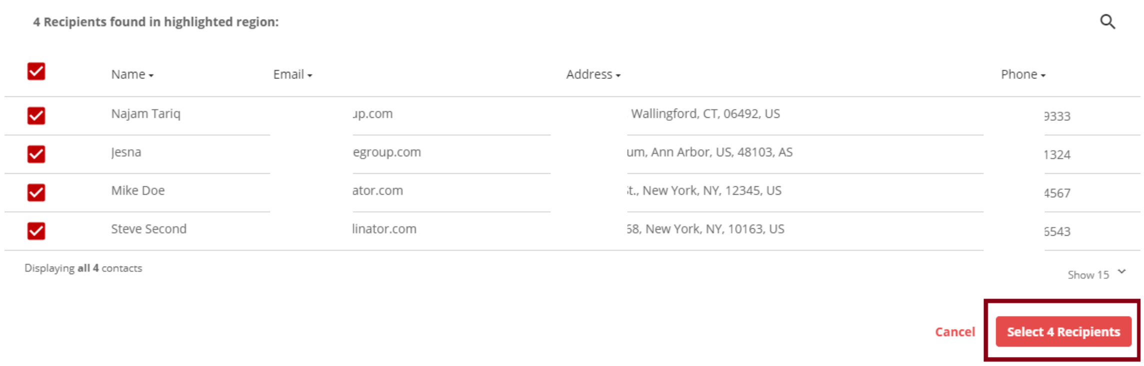
All contacts in the selected region get populated on the page.

8. You can filter contacts by entering the name of a specific group in the **Filter by Groups** field. See the following image:



9. Select or deselect the added contacts as required.

10. Click **Select Recipient** button. See the following image:

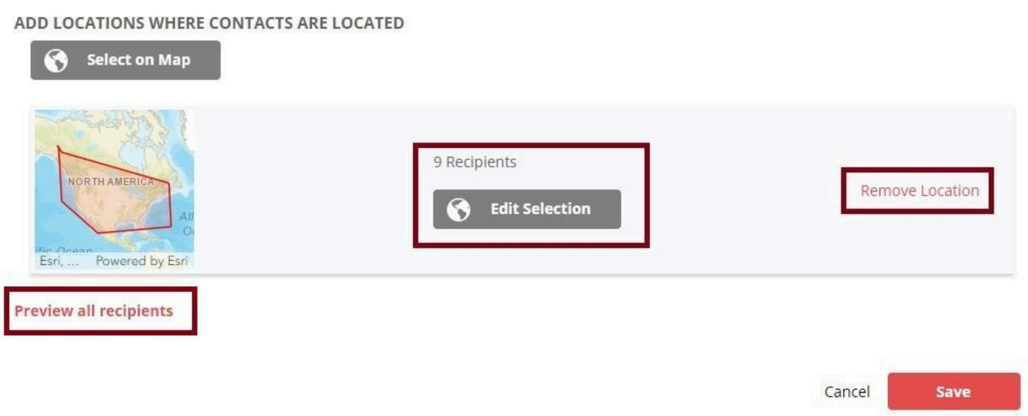


The newly added map location appears on the **Recipients** page

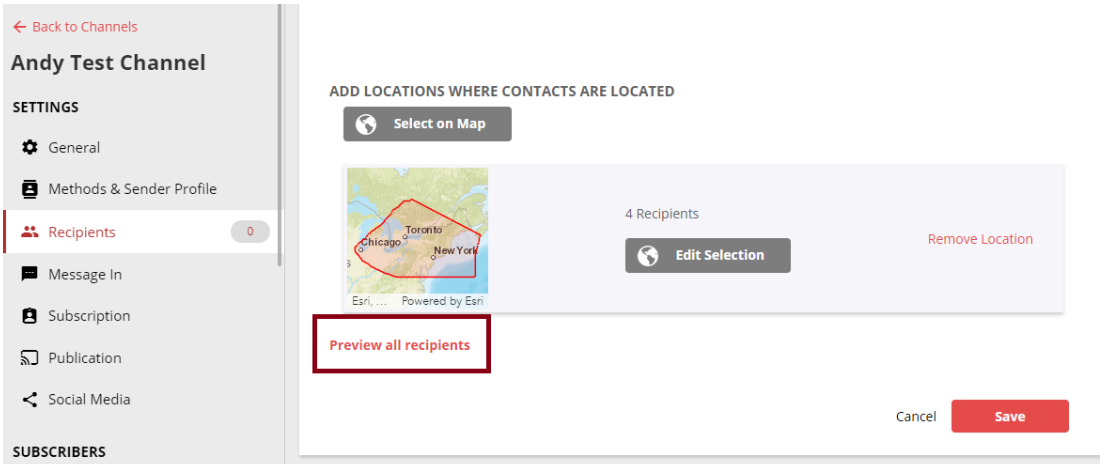
11. To edit the selected map location, click **Edit Selection**.

12. You can click **Remove** location to remove the map location.

13. You can click **Preview all recipients** to see all the recipients added to this channel. See the following image:



14. You can click **Preview all recipients** to view the contacts selected. See the following image:



15. **Save**.

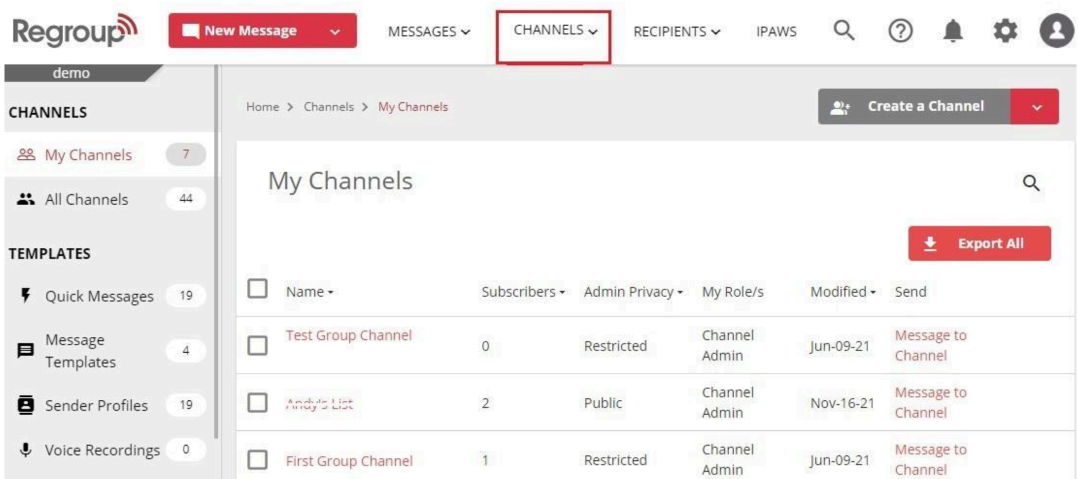
    You have now added the contacts selected from the map to the channel.

Add and Update Admins

You can add and update admins to a channel in the **Admins** section of the channel. You can add more than one admin and provide them with custom roles that assign specific task permissions defined in the [Admins and Roles]() section. You can also set up approval for the post this admin shares.

Here is how you add and update an admin:

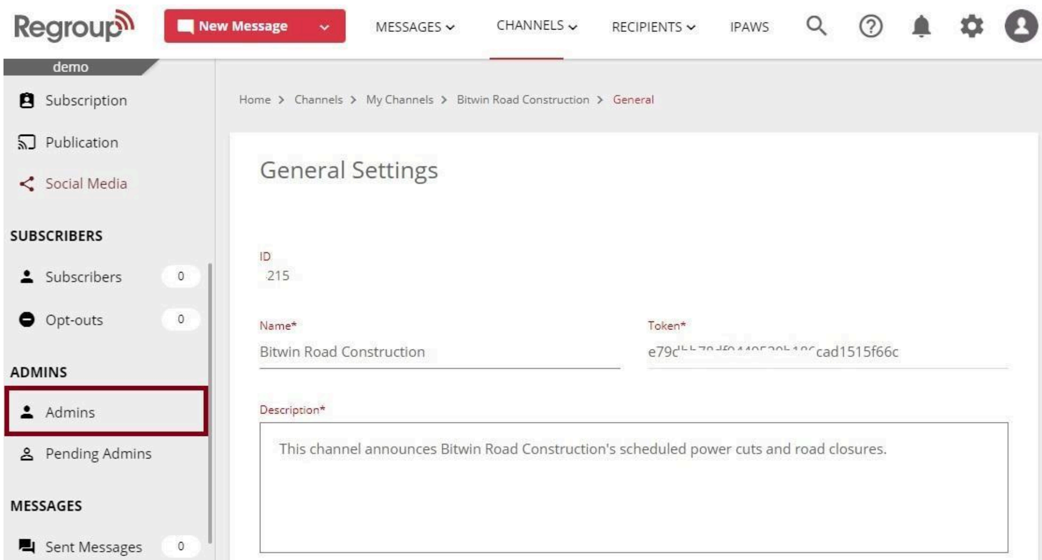
1. Click the **Channels** tab. See the following image:



   The My Channels page appears.

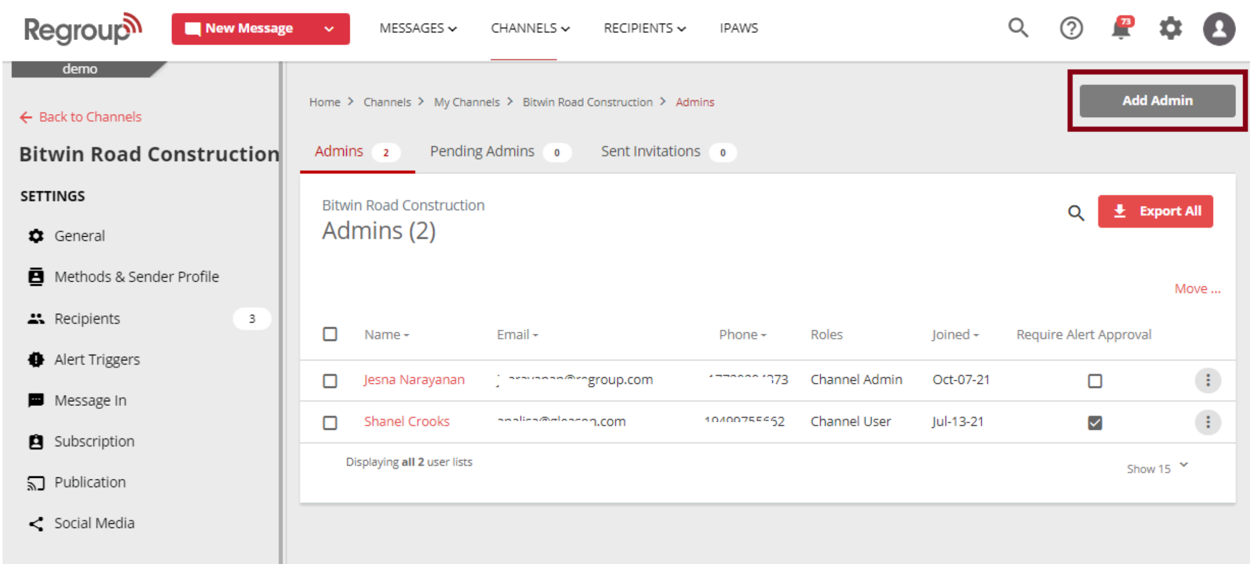
2. Search and locate the channel on the **My Channels** page. The organization admins can add admins to the channels on the **All Channels** tab.
3. Click the channel's name to open it.

   The **General Setting** page opens.
4. Scroll down to the **Admins** section on the left navigation panel and click **Admins**. See the following image:



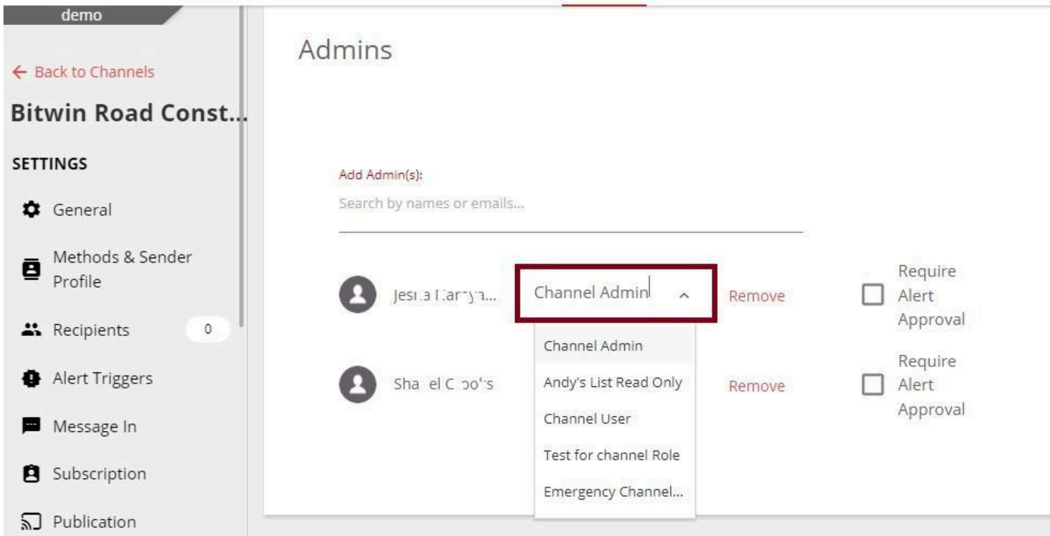
The Admins page opens.

5. Click **Add Admin**. See the following image:



6. Enter the admin's name in the **Add Admin (s)** field.

7. Click the role dropdown to update the admin role and select the required role. See the following image:



8. Click **Remove** to remove an admin.
9. Click the **Require Alert Approval** checkbox to enable the approval requirement for all the posts this admin shares.

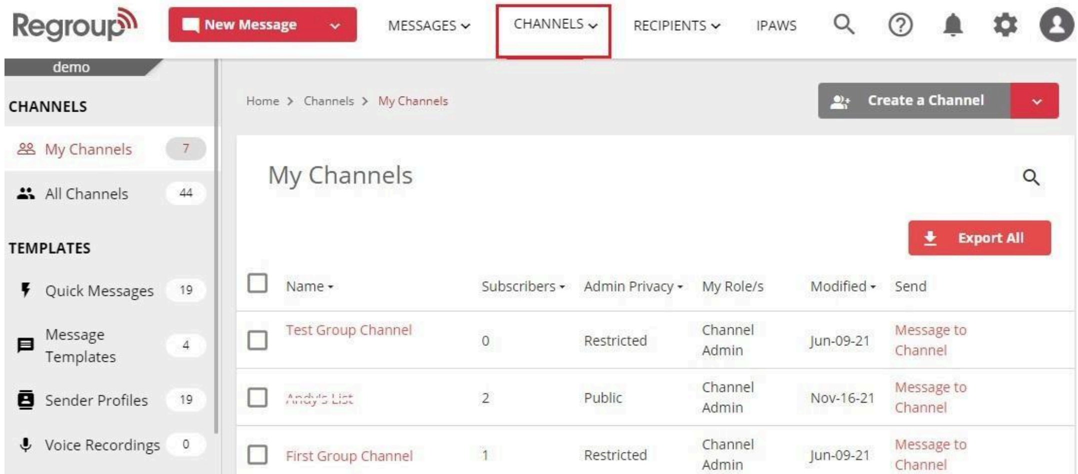
Update Admins' Notification Settings or Move them

You can update what notifications an admin should receive on the Admins page of each channel. You also can move the admin to another channel with a new role here. The Admins page also allows you to set up approval requirements for the messages this admin shares.

Tip: The Move Admin feature moves the admin from the current channel and add them to the new channel.

Here is how you update the notification settings and move admins to a different channel:

1. Click the **Channels** tab. See the following image:

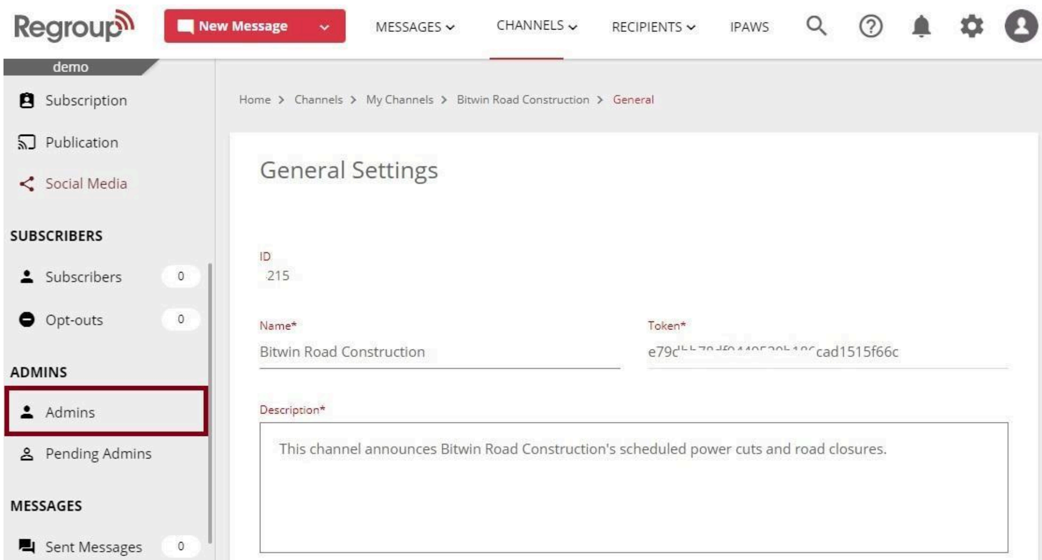


The My Channels page appears.

2. Search and locate the channel on the **My Channels** page. The organization admins can add admins to the channels on the **All Channels** tab.
3. Click the channel's name to open it.

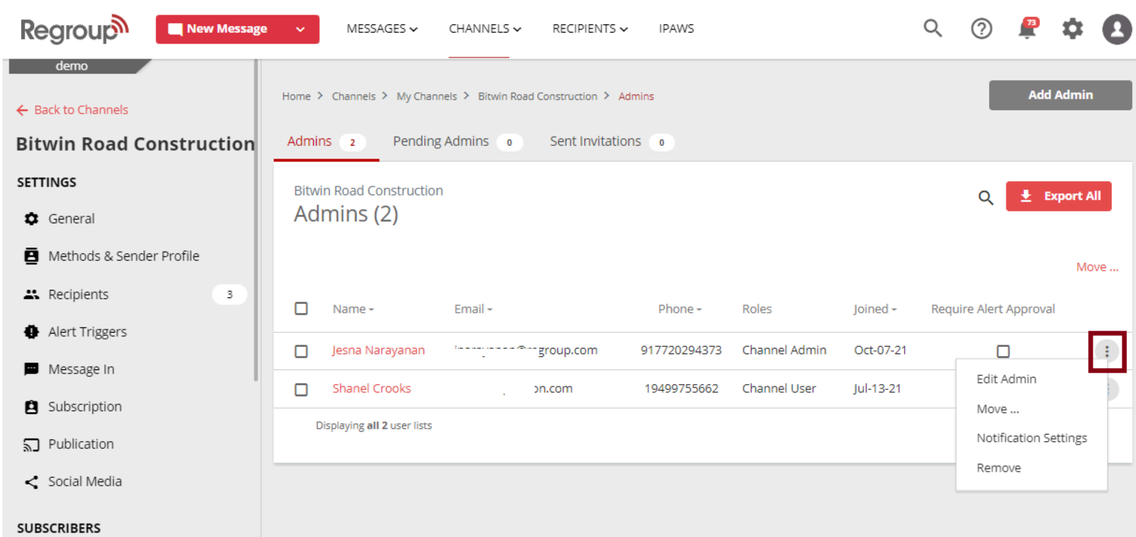
   The **General Setting** page opens.
4. Scroll down to the **Admins** section on the left navigation panel and click **Admins**.

   See the following image:



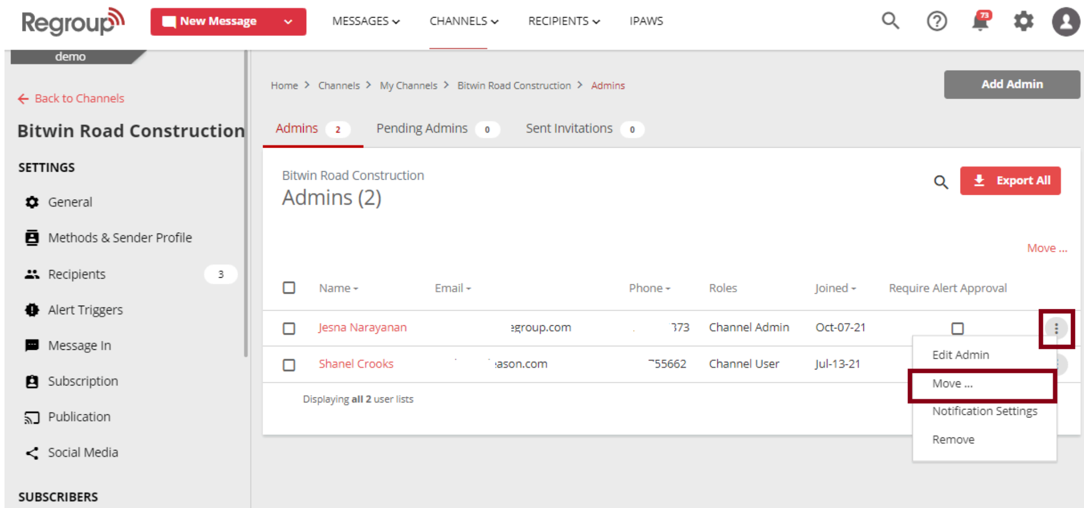
The Admins page opens.

5. Click the vertical ellipsis corresponding to the admins you want to update. See the following image:



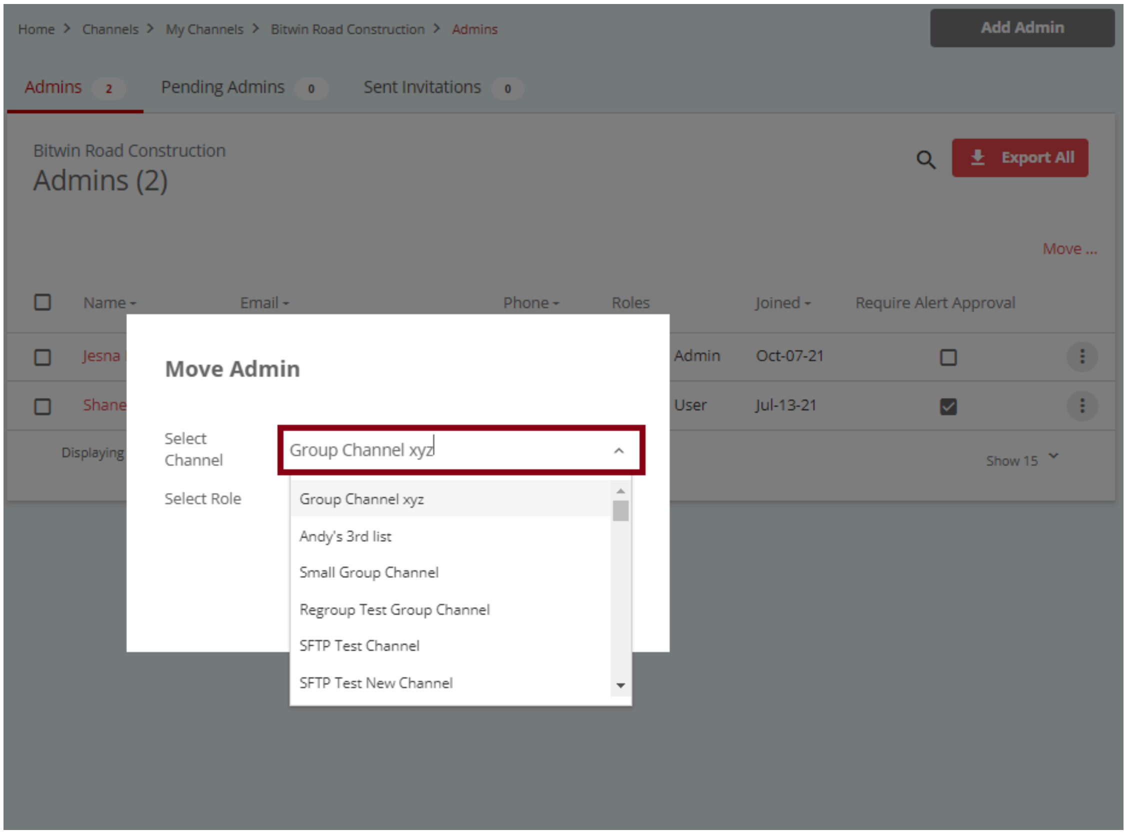
6. To move admins to different channels:

a. Click **Move** option on the vertical ellipsis. See the following image:



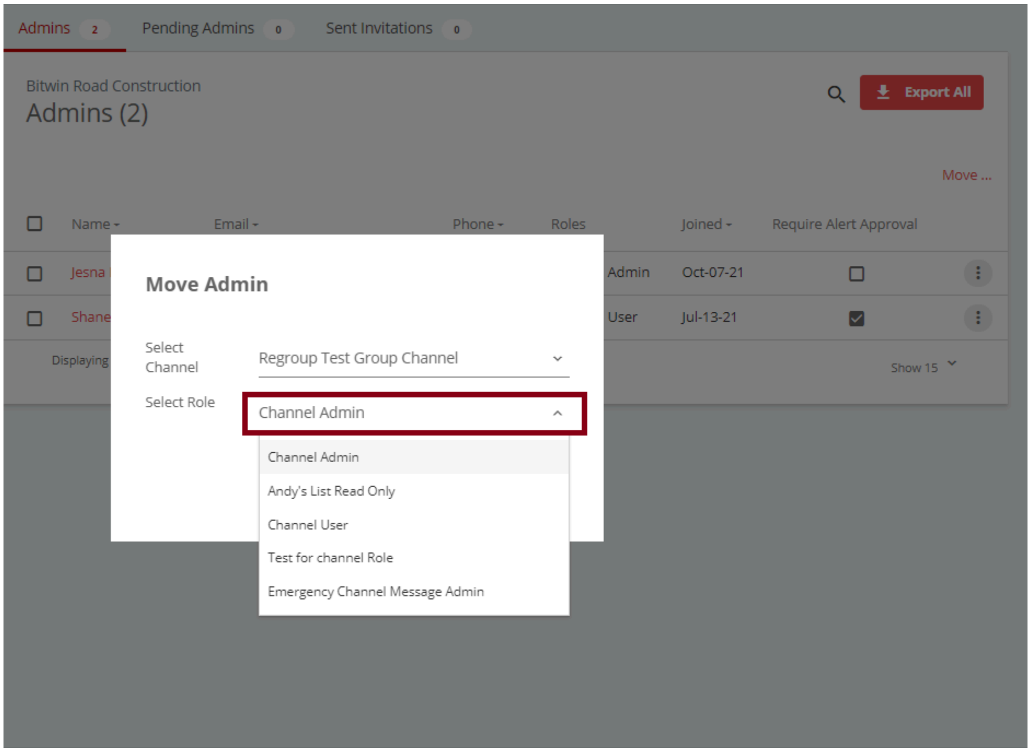
The Move Admins page pops up.

b. Click the **Select Channel** dropdown and select the channel to which the admin must be moved. See the following image:



Home > Channels > My Channels > Bitwin Road Construction > Admins
Add Admin
Admins 2
Pending Admins 0
Sent Invitations 0
Bitwin Road Construction
Admins (2)
Export All
Move ...
Name
Email
Phone
Roles
Joined
Require Alert Approval
Jesna
Admin
Oct-07-21
Shane
User
Jul-13-21
Displaying
Show 15
Move Admin
Select Channel
Group Channel xyz
Select Role
Group Channel xyz
Andy's 3rd list
Small Group Channel
Regroup Test Group Channel
SFTP Test Channel
SFTP Test New Channel

c. Click **Select Role** dropdown and select the role this admin must perform in the new channel. See the following image:

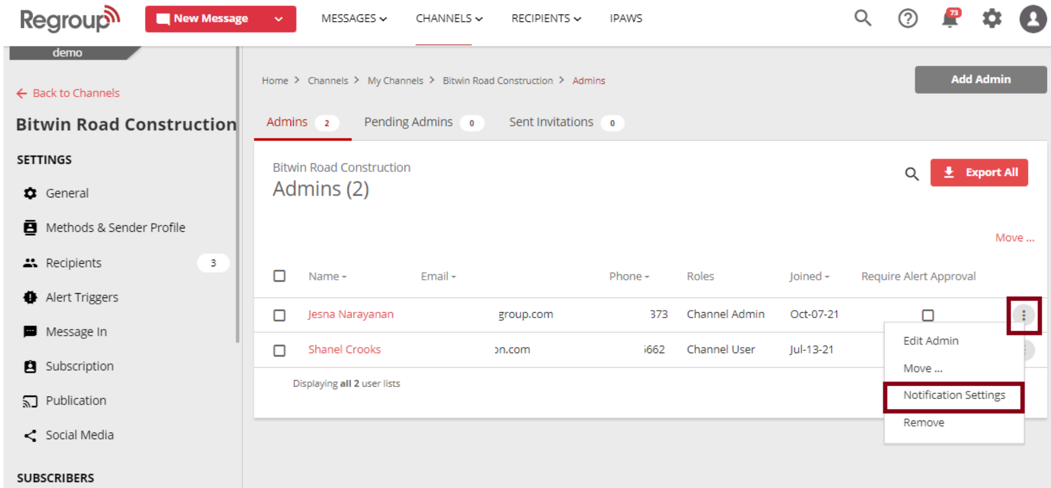


d. Click **Move**.

You get a confirmation message confirming this admin's addition to the new channel.

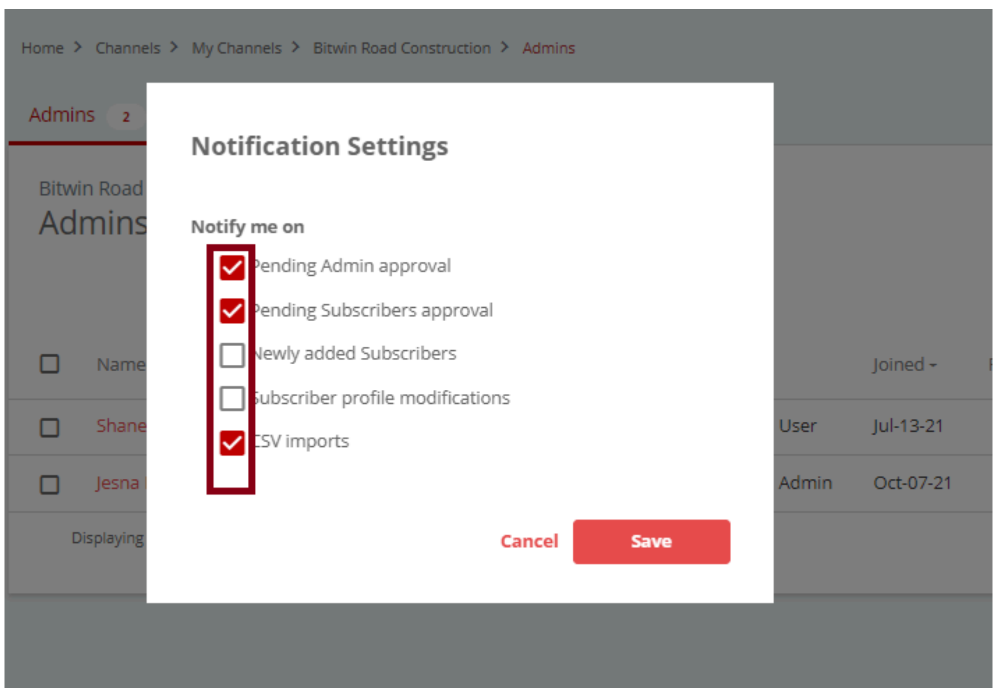
7. To update admins' notification settings:

a. Click **Notification Settings** option on the vertical ellipsis. See the following image:



The Notification Settings page pops up.

b. Click the checkboxes corresponding to the notification you want to enable for this admin. See the following image:



c. Click **Save**.

You get a confirmation message confirming the admin notification update.

8. admin's name in the **Add Admin (s)** field.

Setup Channel Subscriptions

Setup Channel Subscriptions: Overview

You can configure channel subscriptions using SMS or webpage signups. You can set up a QR code for both of these subscriptions. For each channel, you can configure who can subscribe and which admin can manage the subscribers. A subscriber can receive messages from the channels along with the channel recipients. In the **Subscription** section, you can set up how the subscription works on both the web and SMS.

You can do the following to manage channel subscription:

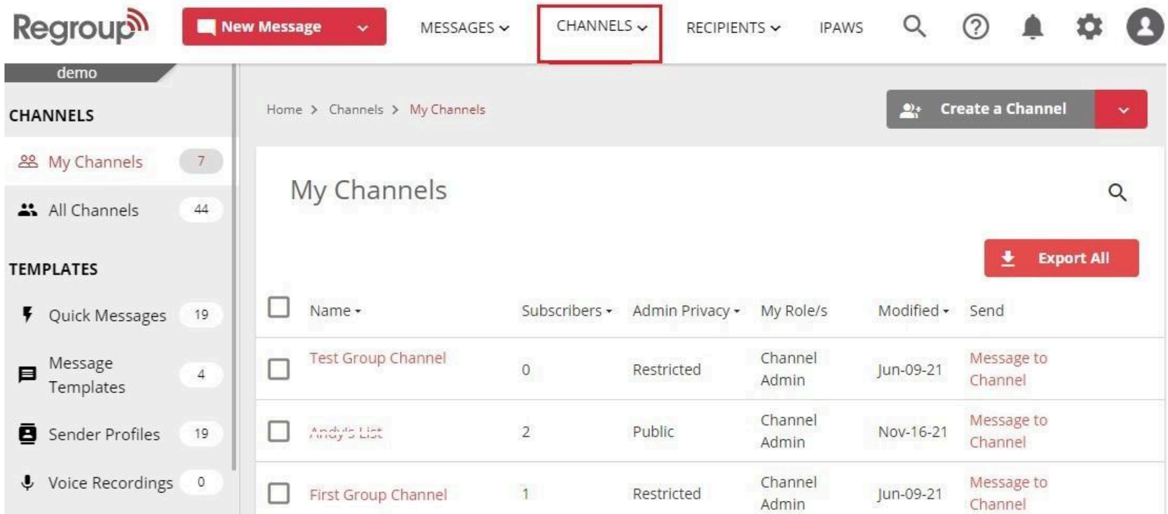
- Configure General Subscription Settings
- Configure Web Signup
- Configure SMS Subscription
- Setup QR Code for Web or SMS Subscription

Configure General Subscription Settings

In the channel subscription general settings, you can configure admin approval, channel's visibility on the contact profile page, and adding subscribers as channel contacts.

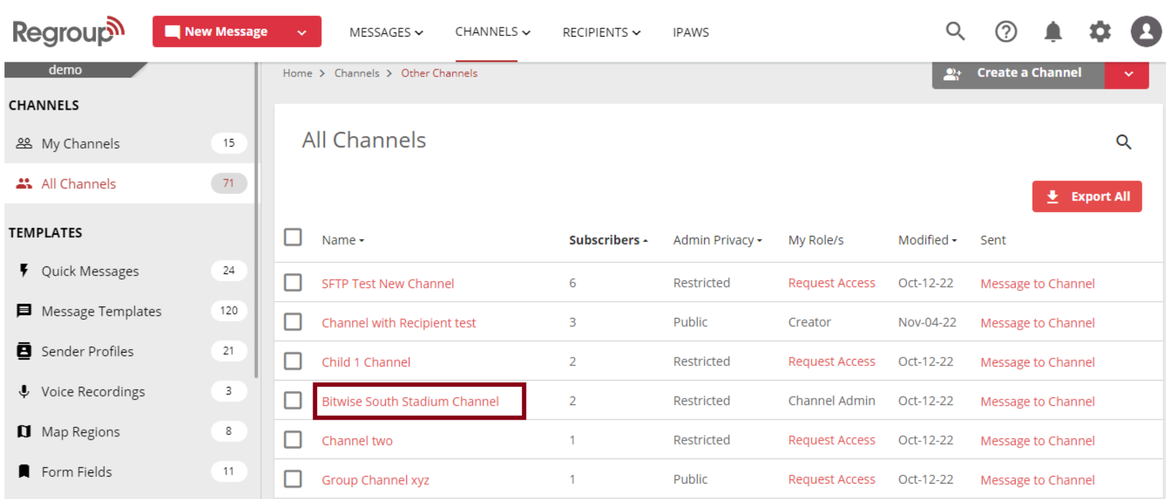
Here is how you configure the general settings for subscription:

1. Click the **Channels** tab. See the following image:



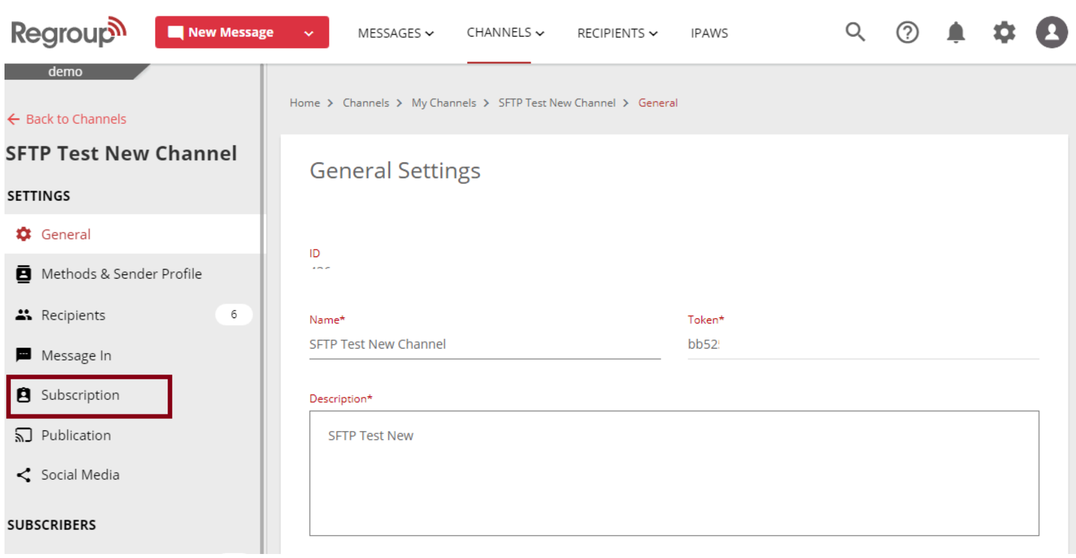
The My Channels page appears.

2. Click the lens icon to search and locate the channel in the **My Channels** tab. The organization admins can edit channels on the **All Channels** tab too.
3. Click the channel's name to open it. See the following image:



The **General Setting** page opens.

4. Click **Subscription**, under the settings, on the left navigation panel. See the following image:



The Subscription page opens.

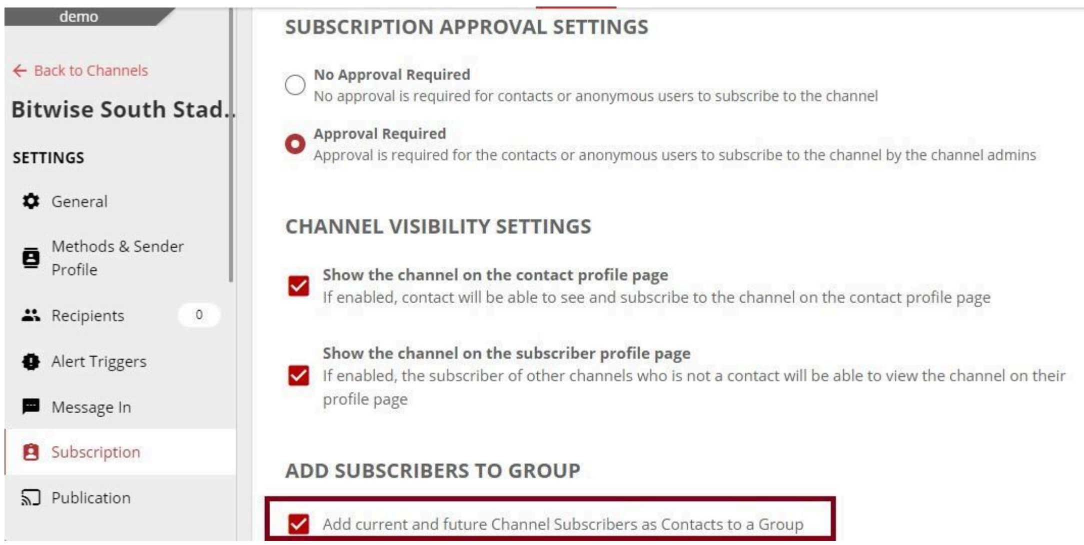
5. Click to enable either of the following **Subscription Approval Settings** radio buttons:

   - **No Approval Required**: Contacts or anonymous users can subscribe to the channel without approval.
   - **Approval Required**: The contacts or anonymous users can subscribe to the channel only when admins approve.

6. Click to enable the required **Channel Visibility Settings** checkboxes:

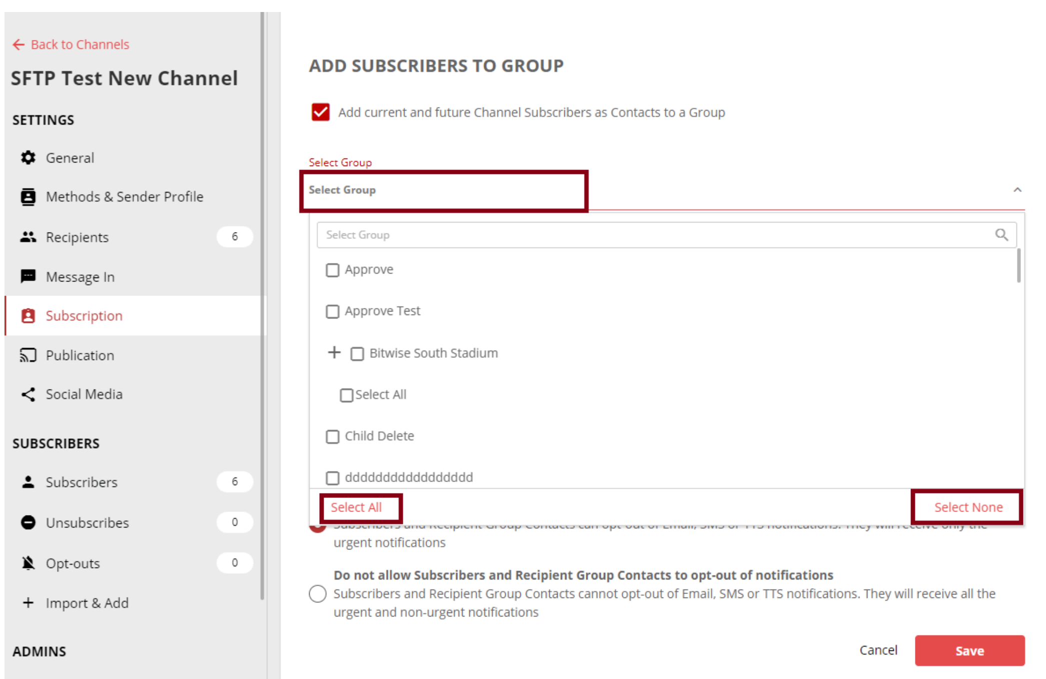
   - **Show the channel on the contact profile page**: Enable the contact to see and subscribe to this channel from the contact profile page.
   - **Show the channel on the subscriber profile page**: Enable other channel's subscribers to view and subscribe to this channel from their profile page.

7. Click to enable the **Add Subscriber to Group** checkbox to add the current and future subscribers as contacts in a selected group. See the following image:



The select group dropdown appears.

8. Click the **Select Group** dropdown and select the group to add the subscribers. You can click **Select All** or **Select None**. See the following image:



The selected groups appear listed.

Note: Subscribers who opt out of a channel are removed from groups to which they are added while subscribing.

9. Click to enable the required **Channel Unsubscribe Settings** checkboxes to prevent subscribers and group contacts from unsubscribing:
    - **Do not allow subscribers to unsubscribe from this channel**: Prevents the subscribers from unsubscribing from this channel.
    - **Do not allow recipient group contacts to unsubscribe from this channel**: Prevents the contacts of the groups you have added as channel recipients from unsubscribing.
10. Click **Opt-out Settings** radio buttons to determine if subscribers can opt to not receive communications:
    - **Allow Subscribers and Recipient Group Contacts to opt-out of notifications**: Subscribers and Recipient Group Contacts can opt out of Email, SMS, or TTS notifications.
      They will receive only urgent notifications.
    - **Do not allow Subscribers and Recipient Group Contacts to opt-out of notifications**: Subscribers and contacts of the recipient groups cannot opt out of Email, SMS, or TTS notifications. They will receive all the urgent and non-urgent notifications.

11. Click **Save** to save your updates.

Configure Web Signup

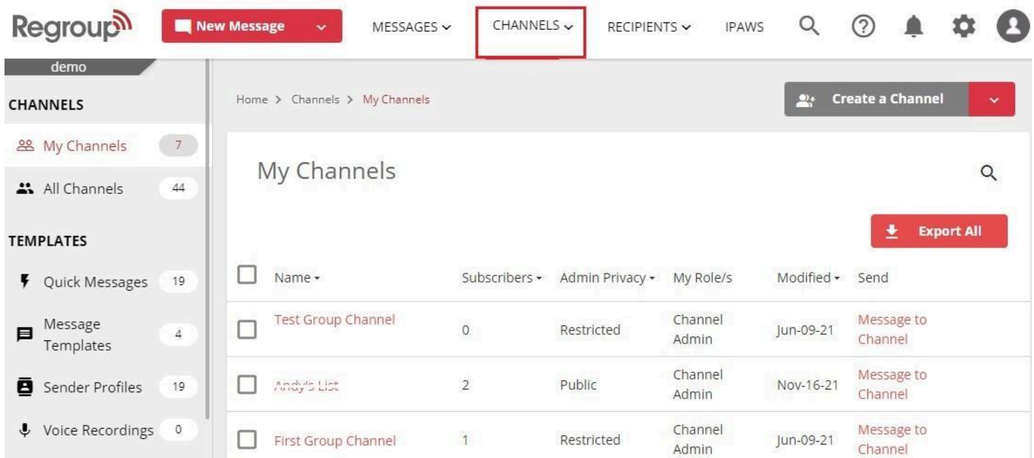
The web signup page for the channel contains the following sections.

Tip: You can search and navigate to the required tasks directly and save the settings.

- **Sign-Up Page Links**: get links and codes to set up the embedded signup pages. Determine where to redirect users after signing up.
- **Data Fields Options**: define fields that users fill in on your signup page. You can also add custom attribute fields.
- **Screening Option**: add yes or no answerable screening questions on the signup page. Upon entering undesired response, users get a screening failure message and are disabled from subscribing to the channel.
- **Display Options**: customize your signup page's font and background color. Determine the welcome message options for subscribers.
- **Welcome Info**: send a welcome message to users, determine delivery method, and customize the content.
- **Additional Subscription Options**: select channels a user can subscribe to when they signup with your organization. Also determine mandatory and optional subscriptions.

Here is how you configure the web signup. You can search and navigate to the required tasks section directly and click Save:

1. Click the **Channels** tab. See the following image:



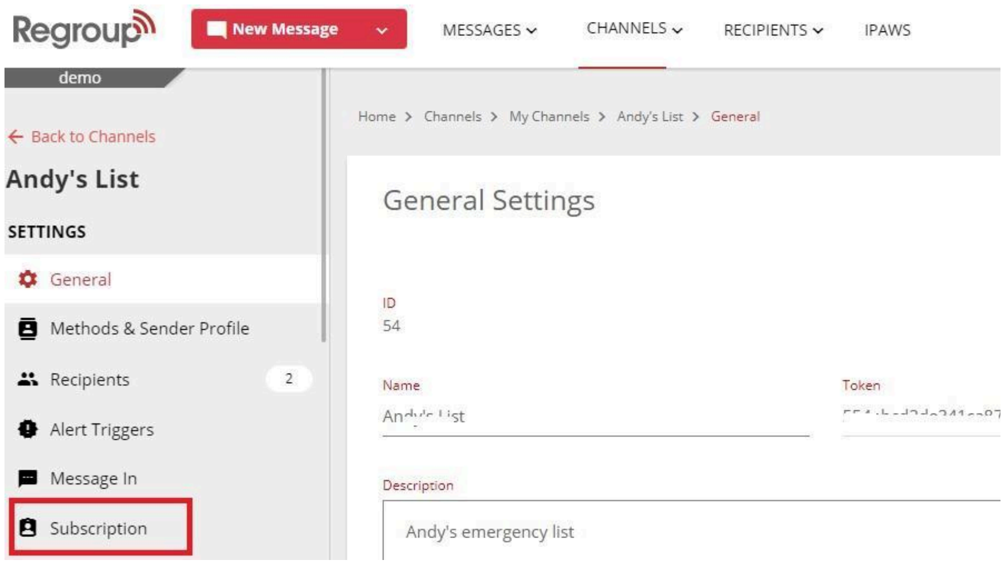
   The My Channels page appears.

2. Search and locate the channel on the **My Channels** page. The organization admins can configure web signup for channels on the **All Channels** tab.

3. Click the channel name to open it.

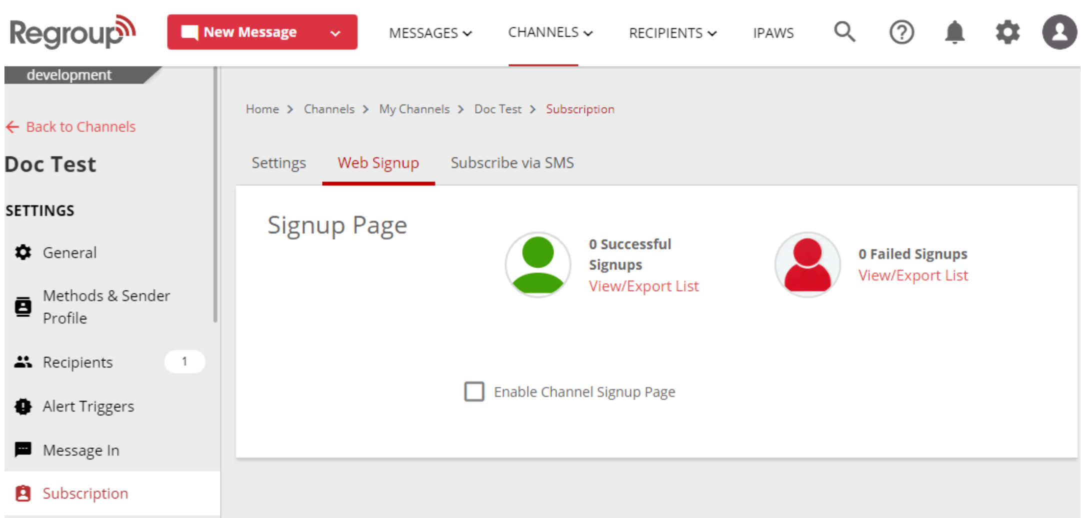
   The **General Setting** page opens.

4. Click **Subscription** under Settings on the left navigation panel. See the following image:

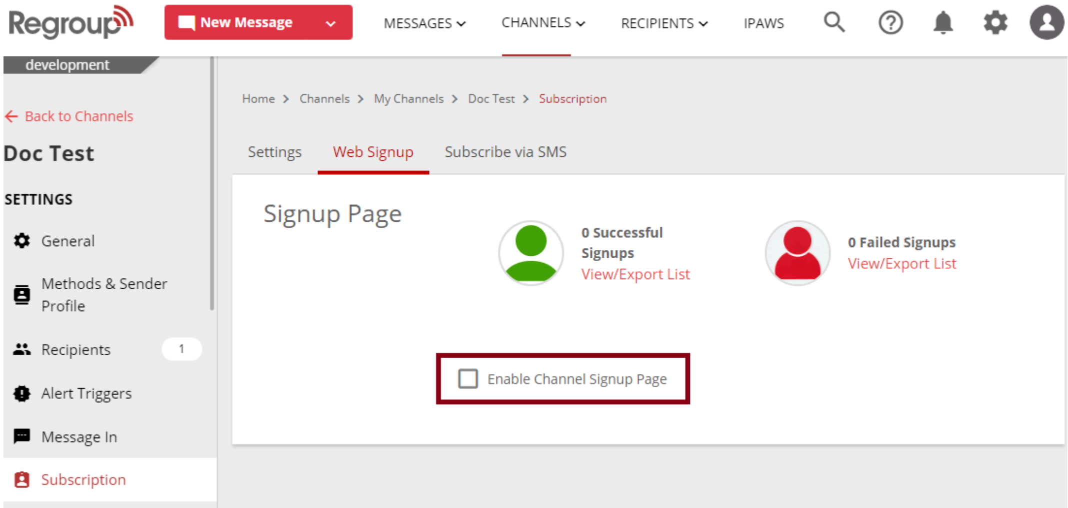


The Subscription Settings page appears.

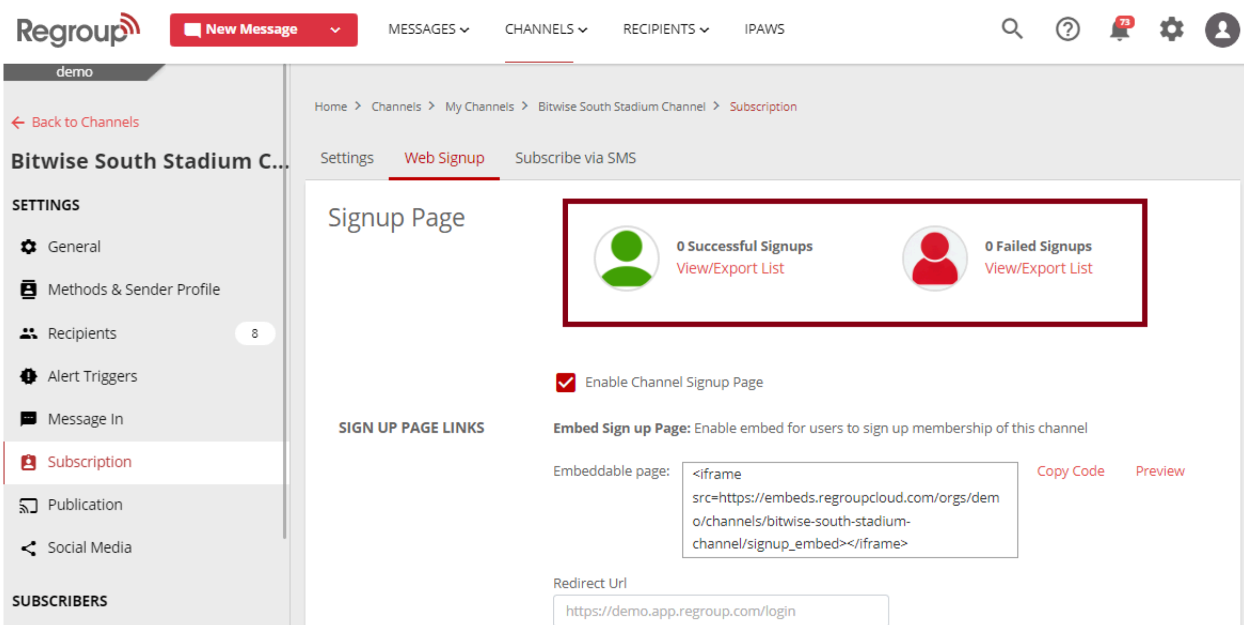
5. Click the **Web Signup** tab. See the following image:



6. Click **Enable Channel Signup Page** check box. See the following image:

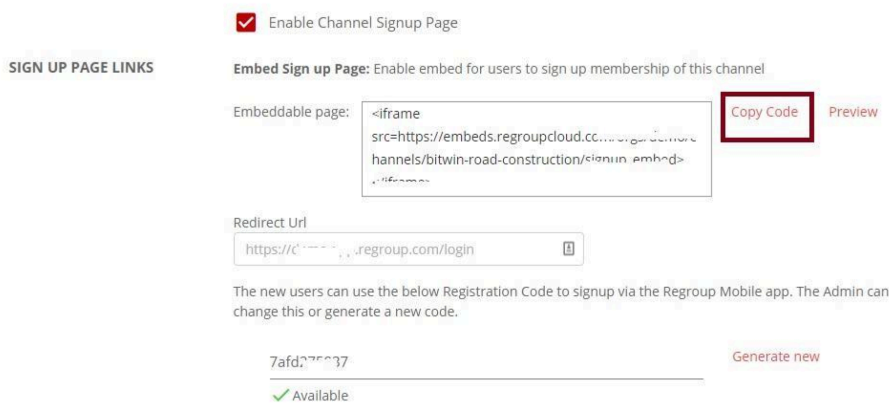


Note: After you set up web signup, you can click **View/Export List** on the **Successful Signup** or **Failed Sign-up** section to view the list of subscribers in each. See the following image:



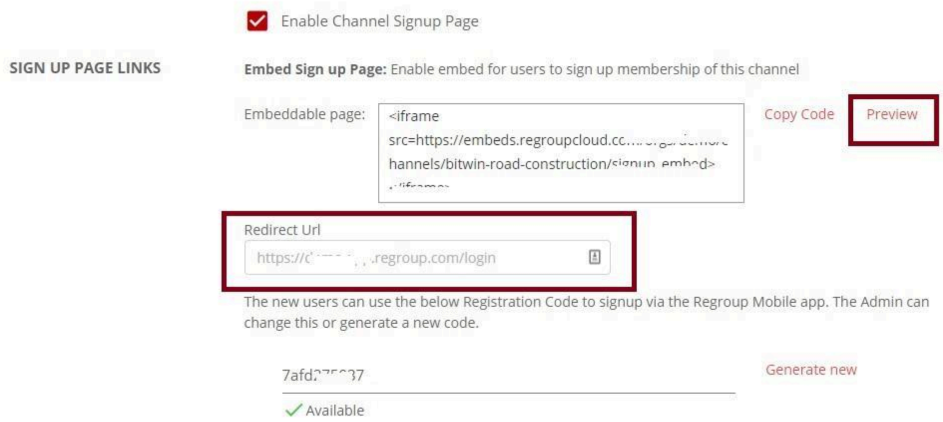
7. To set up the embedded **Sign Up Page Links** on your website and mobile app:
    a. Click the **Copy Code** to copy the code of the embeddable page. Host this code on a website to embed the Regroup signup page there.

    See the following image:

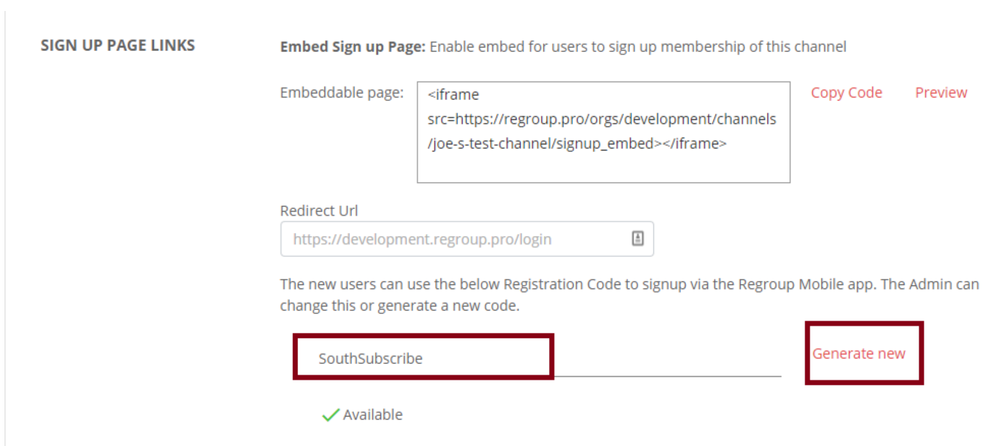
    Note: The embedded Regroup signup page will be iframe and hosted outside your servers.

    b. You can click **Preview** to see how this page appears on your website. See the following image:



c. Enter the **Redirect URL** link of any page to direct the user after they signup and subscribe.

d. Enter or copy the **Registration Code** to set up a mobile signup page for your organization channels. See the following image:



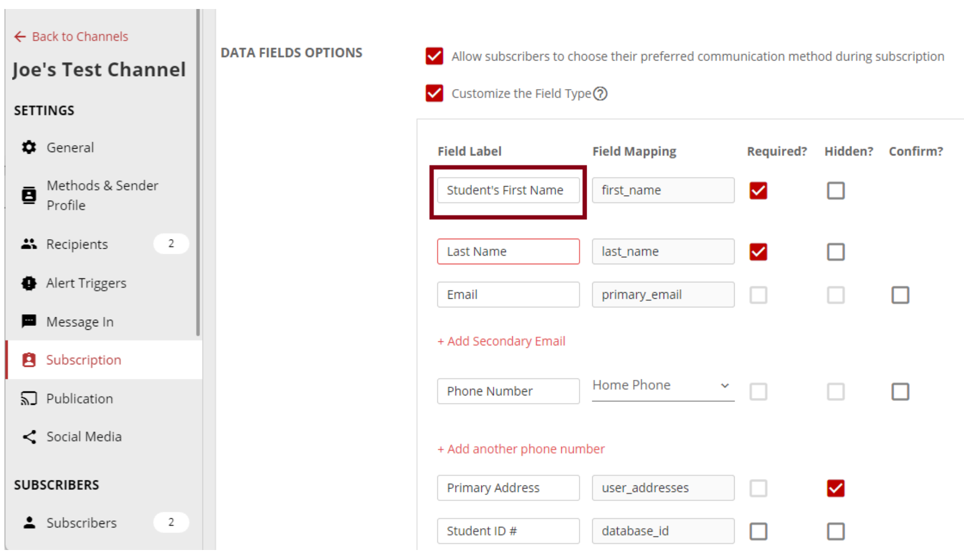
Tip: Use this code to enable users to sign up to your organization using the mobile app.

e. Click the existing registration code to edit and create a new registration code.

f. You can click **Generate New** to generate a new code.

8. To edit and customize the **Data Fields Options** that a user fills when signing up with your organization:
    a. You can click **Allow subscribers to choose their preferred communication method during subscription** to allow a subscriber to choose a delivery method preference. If you choose this, the Email data field becomes mandatory for signing up.

    b. Click **Field Label** to update what the subscriber sees on the web page as the label of a data field. See the following image:

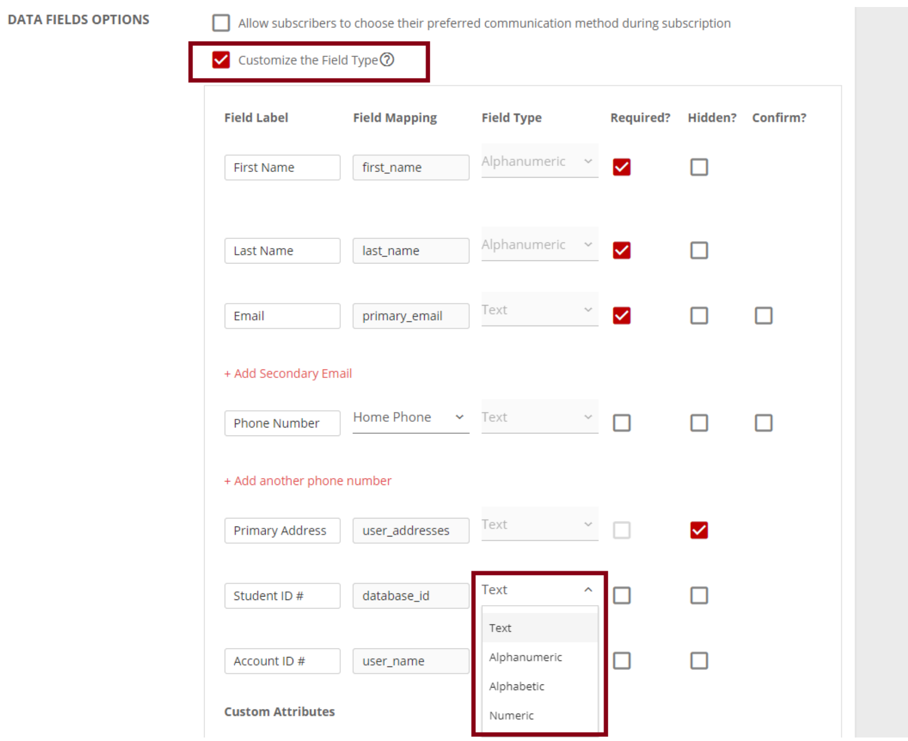


    c. Click the **Field Mapping** column corresponding to a field label to update how each element is registered on the database.

Note: You cannot change the Field Mapping for first name, last name, and primary email.

d. Click the **Customize the Field Type** checkbox to select the type of input value allowed for each field.

See the following image:



You can only customize the field type of custom attributes, user names, and external database IDs. By default, first name and last name are alphanumeric. The email, phone number, and address are text fields.

e. Click the **Required** and **Hidden** checkboxes corresponding to each field label to show or hide the field on the signup page.

f. Click **Confirm** checkbox to enable verification message or email. When enabled, the subscriber gets a confirmation OTP or verification link to their phone number or email.

g. You can click **+Add Secondary Email** and **+Add another phone number** to add a secondary email and phone number to the login field.

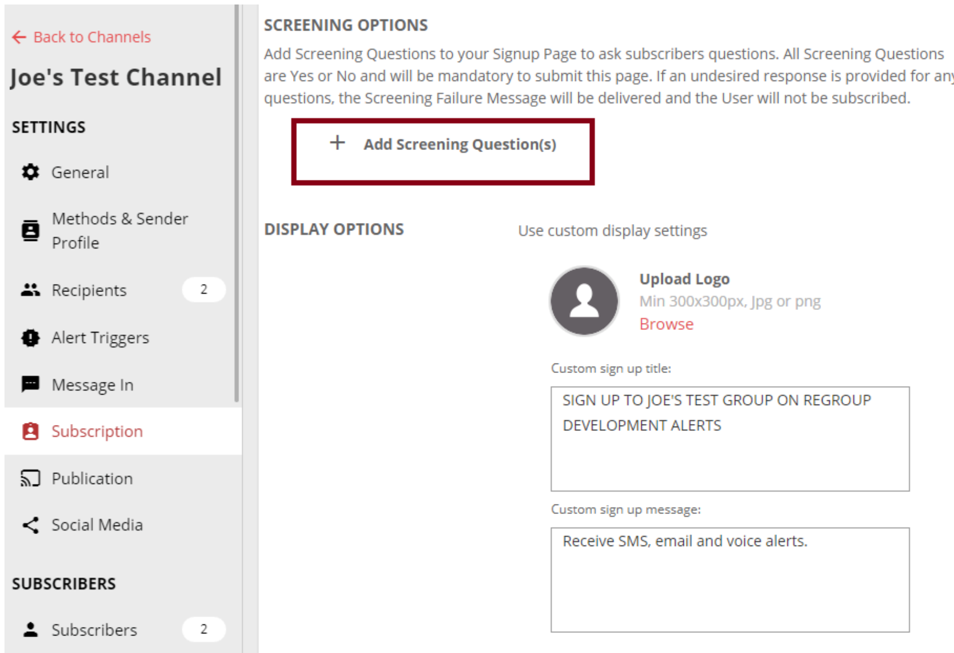
   Note: Ensure that you have at least the phone number or email address as the contact method.

h. Click **Add new** under the **Custom Attribute** to add the custom attribute as the organization signup page's field label.

9. To add **Screening Options** to your signup page to ask subscribers questions:

a. Click **Add Screening Question(s)** to add questions.

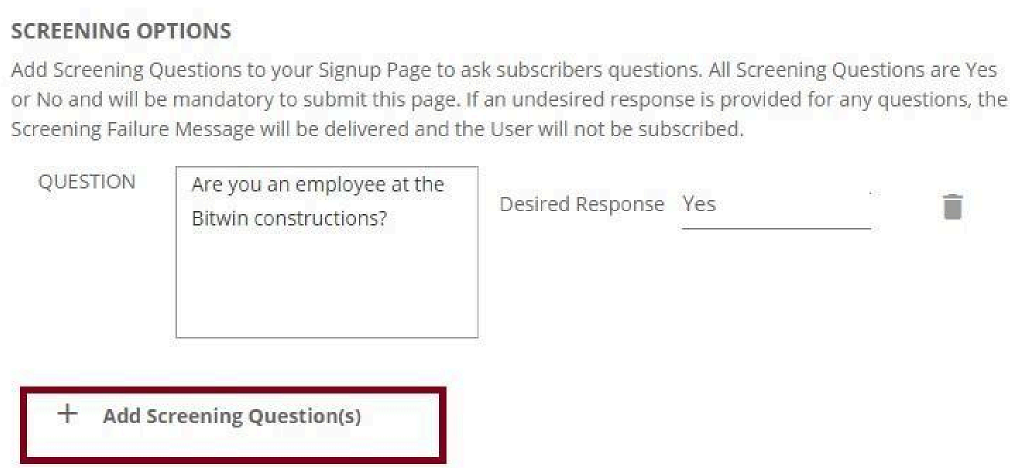
   See the following image:



b. Enter the required question in the **Questions** box.

c. Click and select Yes or No from the **Desired Response.**

d. Click **Add Screening Questions** to add more questions. See the following image:



e. You can click the **Delete** icon to delete a question and its response.

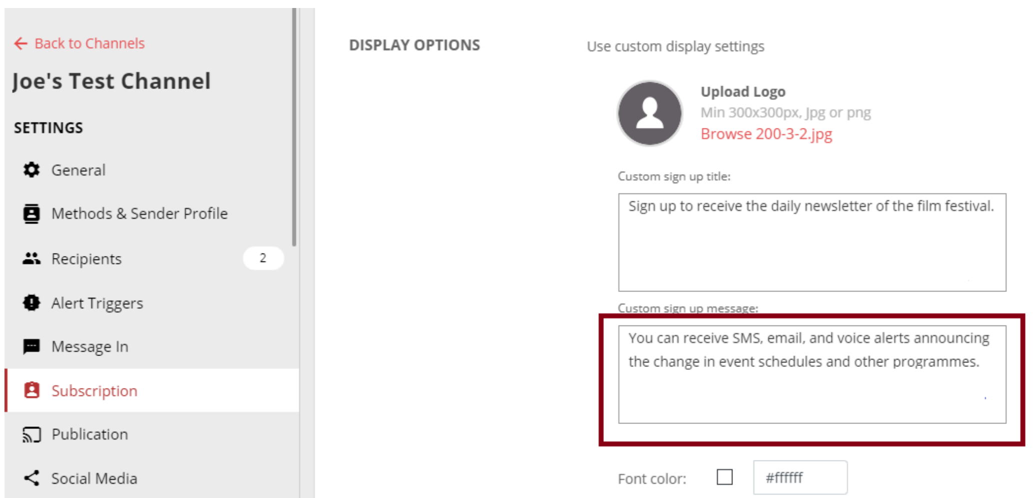
10. To customize the **Display Options** for the web signup page:

a. Click **Browse** to upload your organization's logo to the subscription page.

b. Enter a signup title in the **Custom Sign-Up Title** field. This text appears on the signup page.

c. Enter a signup message in the **Custom sign-up message** field. You can describe what happens when they subscribe to the channels.

See the following image:

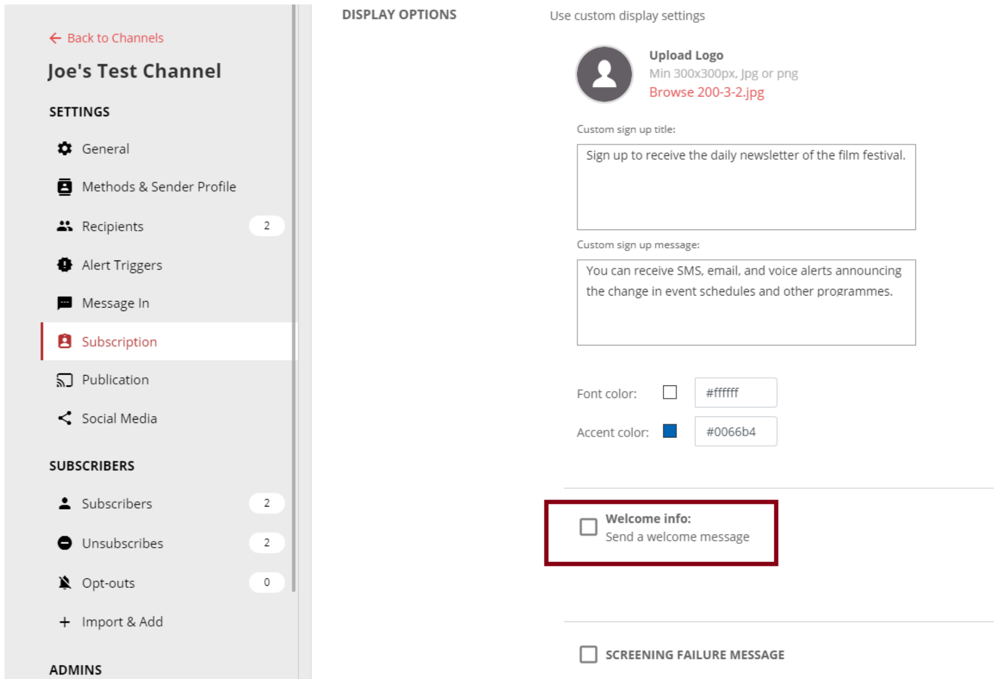


d. Click the color picker box to select the color of the following on the signup page:

- **Font Colour**: the color of the font on the signup page
- **Accent color**: the color of the highlighted text on the signup page

11. You can enable and customize the **Welcome Info** and message:

a. Click the **Welcome info** checkbox to enable sending a welcome message to the signed-in users. See the following image:



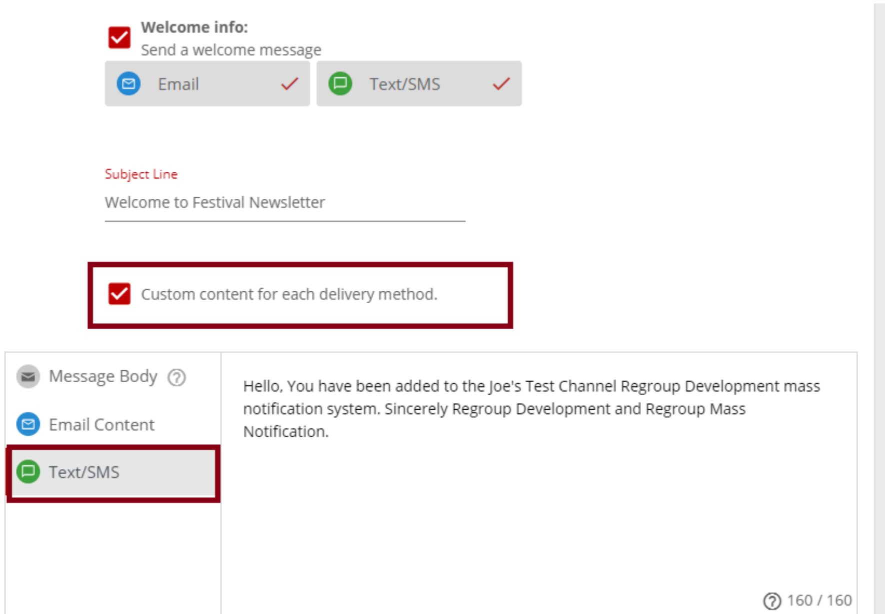
b. Select the delivery method as **Email** or **Text/SMS**.

c. Enter the **Email Subject Line**.

A default welcome message is set for all delivery methods.

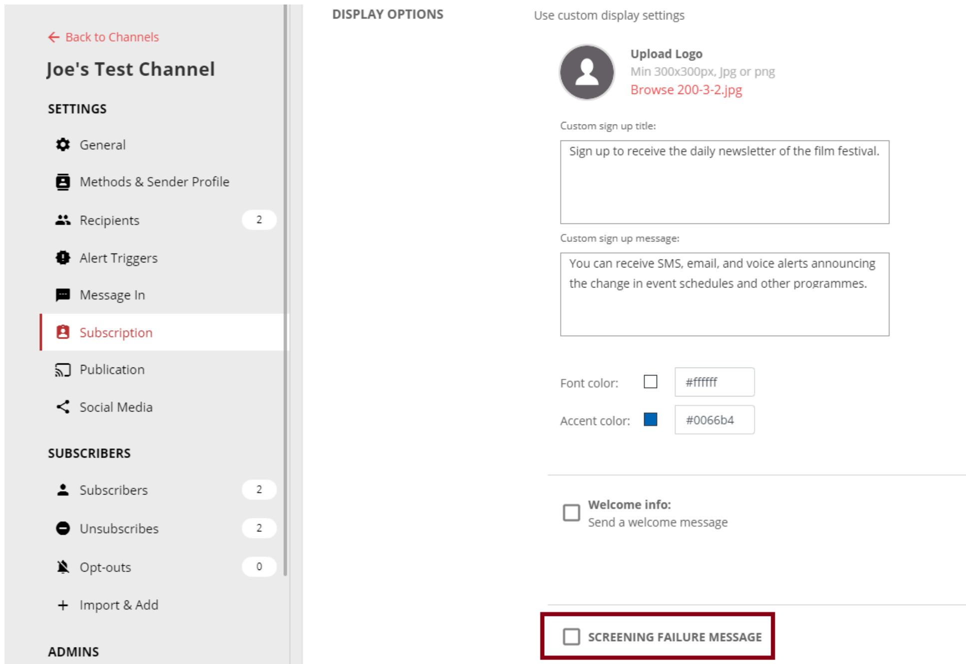
d. Click the **Custom content for each delivery method** checkbox to customize the welcome message.

e. Click each delivery method and update the message. See the following image:



12. You can enable sending a **Screening Failure Message** to the user who fails to answer the screening question:

a. Click the **Screening Failure Message** checkbox. See the following image:



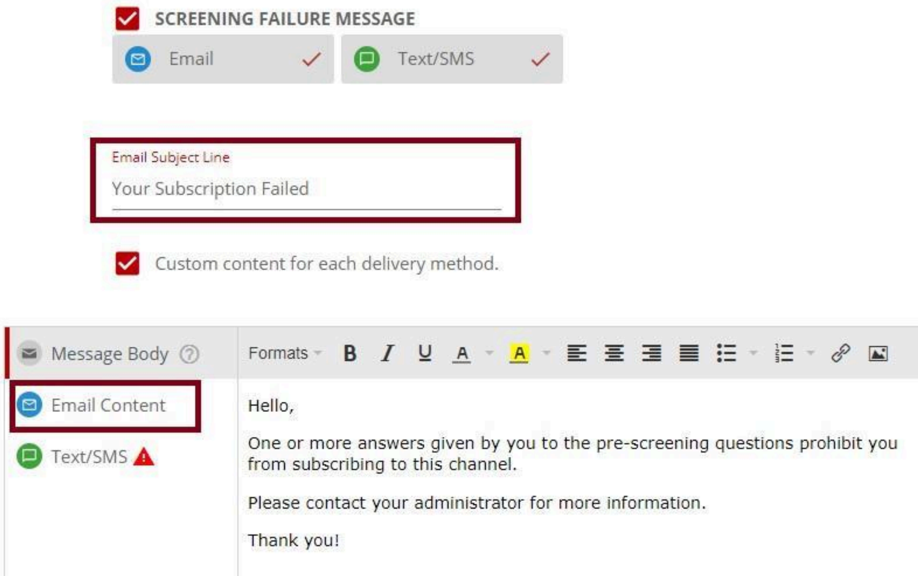
Select the delivery method to send the message from **Email** or **Text/SMS**.

b. Select the delivery method as **Email** or **Text/SMS**.

c. Enter the **Email Subject Line**. A default welcome message is set for all delivery methods.

d. Click the **Custom content for each delivery method** checkbox to customize the welcome message.

e. Click each delivery method and update the message. See the following image:

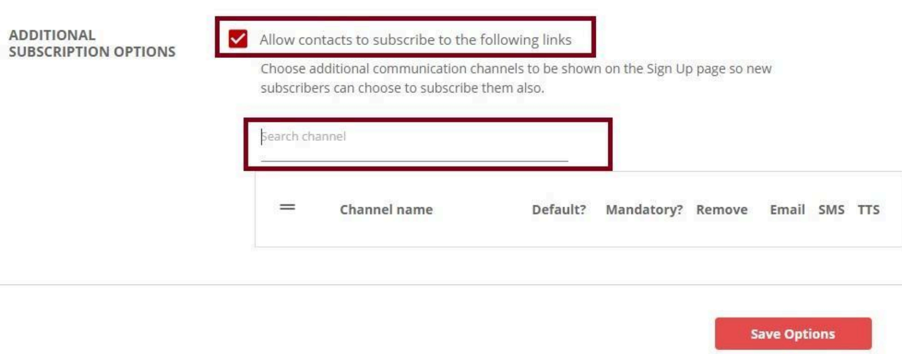


f. Update the default text/SMS body to reduce the text limit to 160 characters.

13. To update the **Additional Subscription** option:

a. Click the **Allow contacts to subscribe to the following links** checkbox to allow contacts to subscribe to the selected channels after they signup.

b. Click the **Search Channel** field and search for the required channels. See the following image:

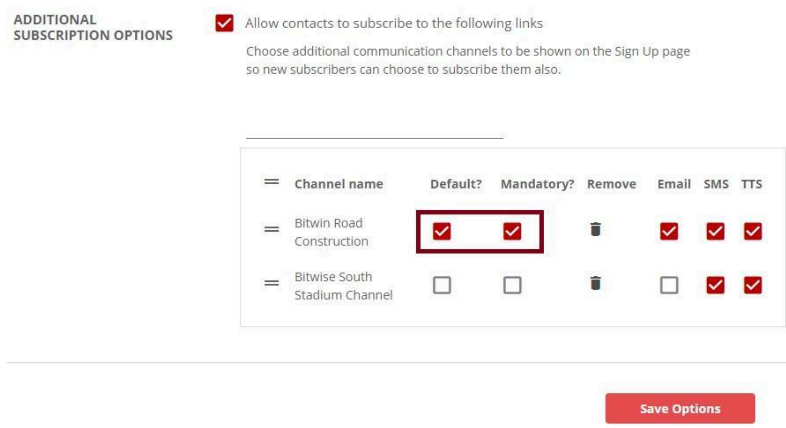


c. Select the following subscription options for each channel:

- **Default:** While signing up, this channel subscription is enabled by default. Subscribers can uncheck the subscription checkbox to opt out.
- **Mandatory**: This channel is a mandatory subscription for the signed-up user.

  Note: You can set the mandatory subscription to only the default subscription channels.

  See the following image:



Tip: You can preview the signup page configuration before you save it. To preview, click **Preview** on the SIGNUP PAGE LINKS section at the top of the page.

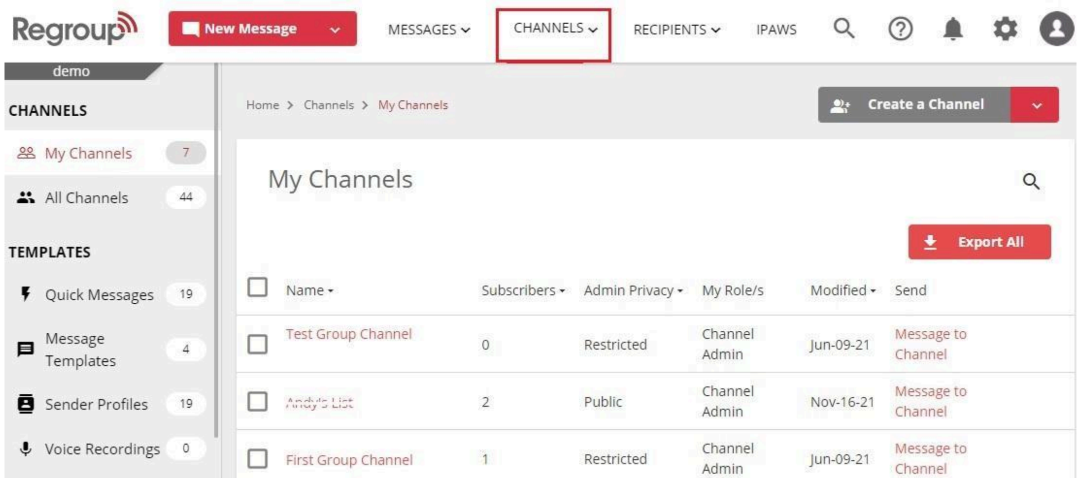
14. Click **Save Options**

Configure Subscription via SMS

You can enable individuals to join communication channels by sending SMS or text messages. You provide a short phone number called a shortcode and a keyword for subscribers to join the channel.

Here is how you configure the SMS subscription:

1. Click the **Channels** tab. See the following image:

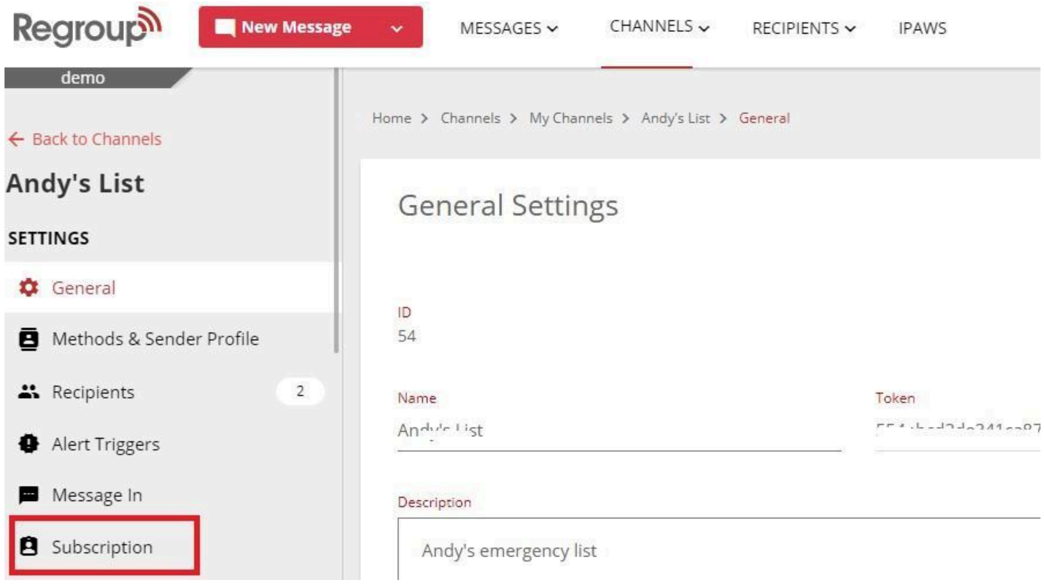


   The My Channels page appears.

2. Search and locate the channel on the **My Channels** page. The organization admins can configure subscriptions for channels on the **All Channels** tab.
3. Click the channel name to open it.

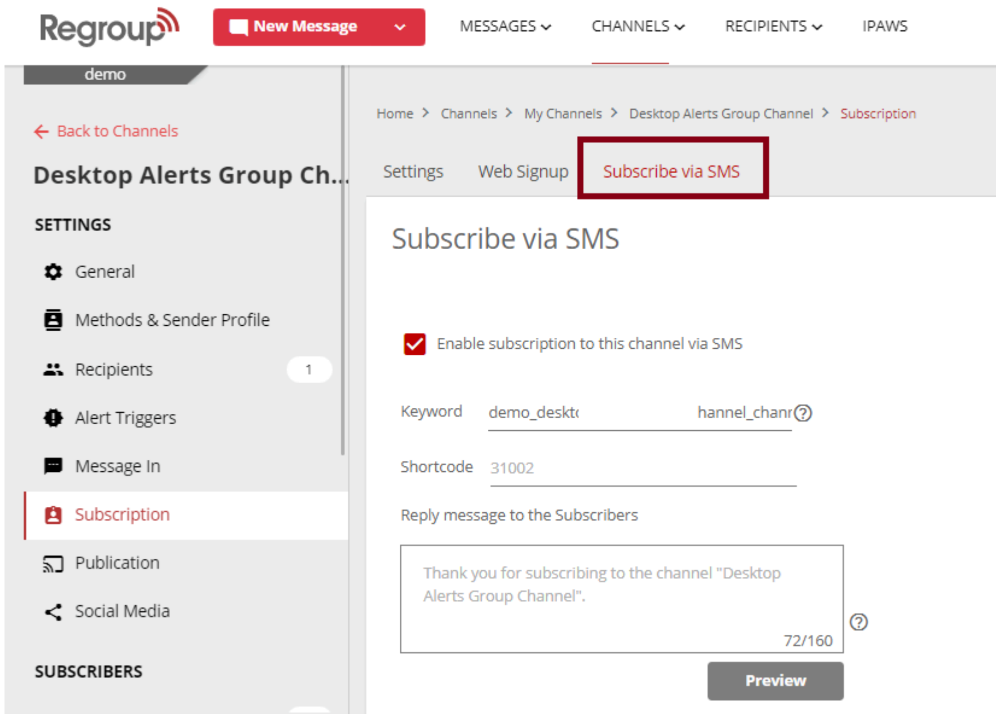
   The **General Setting** page opens.

4. Click **Subscription**, under the settings, on the left navigation panel. See the following image:



The Subscription Settings page appears.

5. Click the **Subscription via SMS** tab. See the following image:



6. Click the **Enable subscription to this channel via SMS** checkbox to enable SMS subscription.
7. Update the **Keyword** or copy it to share with contacts to enable SMS subscription.

   Tip: Contacts must enter the SMS as **join yourJoinKeyword** and send the message to the following phone numbers (appears as **Shortcode**):

   - USA 31002
   - Canada 14372914181
   - Panama 62484
   - International 16284332541.

To see more about the join syntax, see the topic: SMS Commands to Subscribe via SMS.

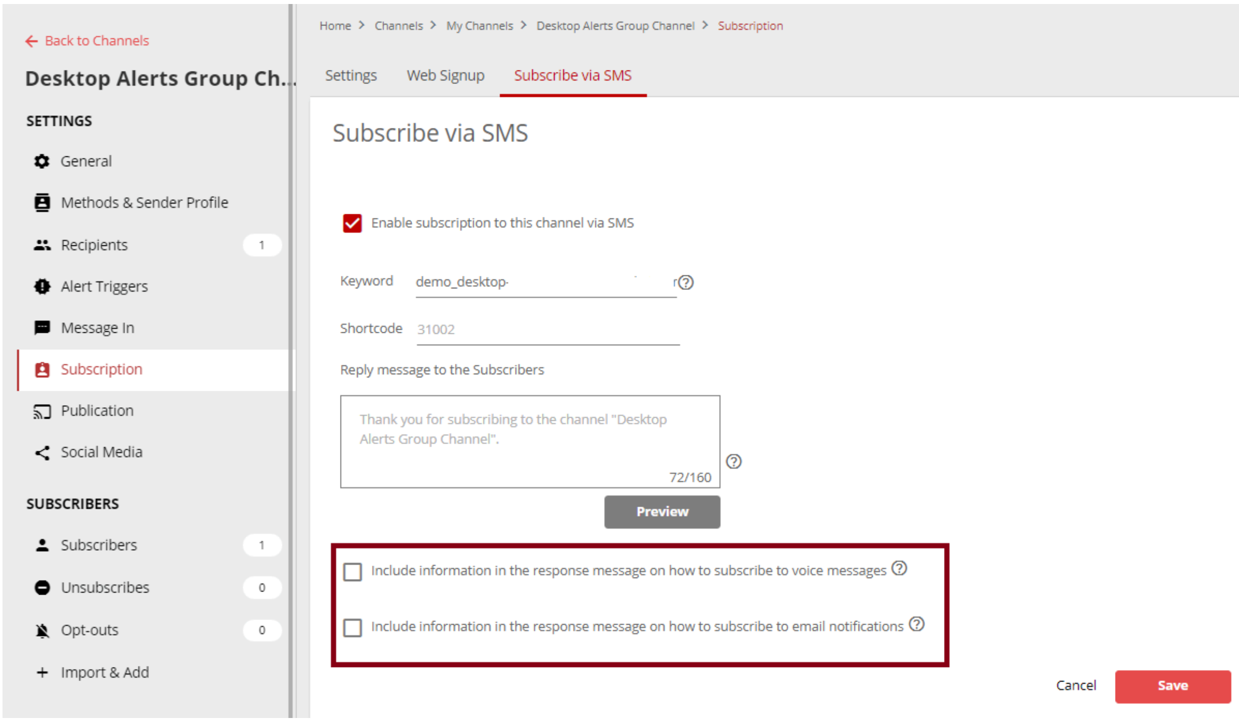
8. Update the **Reply message to the Subscribers** field with a welcome message for the recipient.

   Note: Subscribers will receive FCC complaint information along with the welcome message. The FCC complaint information and your subscription codes are sent separately.

9. You can click **Preview** to view the welcome message and click **Ok**.
10. You can click the **Include information in the response message on how to subscribe to voice messages** checkbox to send message to the subscriber with details on how to subscribe to voice messages.

Tip: If the message character exceed the permitted limit (160 charecter), the system sends them as seperate messages.

See the following image:



11. You can click the **Include information in the response message on how to subscribe to email notifications** checkbox to send message to the subscriber with details on how to subscribe to voice messages.

Tip: If the message character exceed the permitted limit (160 charecter), the system sends them as seperate messages.

12. Click **Save.**

SMS Commands to Subscribe Using SMS

You can use the following syntax to create keywords. Use the space and colons as mentioned.

Syntax	Description
join keyword	Joining the channel
join keyword:en	Joining the channel and updating the preferred language
join keyword email@email.com	Joining the channel if multiple contacts have the same phone number
join keyword:en email@email.com	Joining the channel if multiple contacts have the same phone number and updating contacts preferred language
Syntax to Join Groups	
join group:group_join_keyword	Joining the specific group
join list:channel_join_keyword -join	Joining the list specific channel
group:group_join_keyword:en	Joining to the group and updating contacts preferred language

join list:list_join_keyword:en	Joining to the list and updating contacts preferred language
join group:group_join_keyword myemail@gmail.com	Joining to the group if multiple contacts have the same phone number
join list:list_join_keyword myemail@gmail.com	Joining to the list if multiple contacts have the same phone number
join group:group_join_keyword:en myemail@gmail.com	Joining to the group if multiple contacts have the same phone number and updating contacts preferred language
join list:list_join_keyword:en myemail@gmail.com	Joining to the list if multiple contacts have the same phone number and updating contacts preferred language

Also, you can use the word “**subscribe**“ instead of join. Example: **subscribe group:group_join_keyword**

The commands JOIN and SUBSCRIBE carry the same functionality. Contact can join or subscribe to a channel to receive SMS notifications using both.

LEAVE

Syntax	Description
leave keyword	To leave a channel
leave keyword email@email.com	To leave a channel, but if the phone number is related to multiple contacts.

STOP

Syntax	Description
stop keyword	Stop receiving channel SMS
stop keyword email@email.com	Stop receiving channel SMS if the phone number is related to multiple contacts.

CANCEL

Syntax	Description
cancel keyword	Stop receiving channel SMS
cancel keyword email@email.com	Stop receiving channel SMS if the phone number is related to multiple contacts.

END

Syntax	Description
end keyword	Stop receiving channel SMS
end keyword email@email.com	Stop receiving channel SMS if the phone number is related to multiple contacts.

QUIT

Syntax	Description
quit keyword	Stop receiving channel SMS
quit keyword email@email.com	Stop receiving channel SMS if the phone number is related to multiple contacts.

The commands STOP, CANCEL, END, and QUIT have the same functionality of stopping the user from receiving the SMS from the mentioned group or list.

Acceptance Criteria

Please note the following when providing the SMS syntax:

- The keyword must be unique across the system.
- Subscribers are created per the command used.

- The sender receives the response to the same number they sent the join command.
- These commands must work the same for Bandwidth and SAP.
- When the stop command is used, the user stops receiving SMS notifications from the channel as per the selection.

Setup QR Code for Web or SMS Subscription

You can create a QR code for the web and SMS subscriptions to a channel. When a user scans a QR code set for web signup, they are directed to the signup page where they can enter their information and sign up. When the QR code is set for the SMS subscription, users who scan the code will dial the subscription code you provide.

You must enter the keyword or URL in a third-party QR code generator to create a QR code. The following are some options:

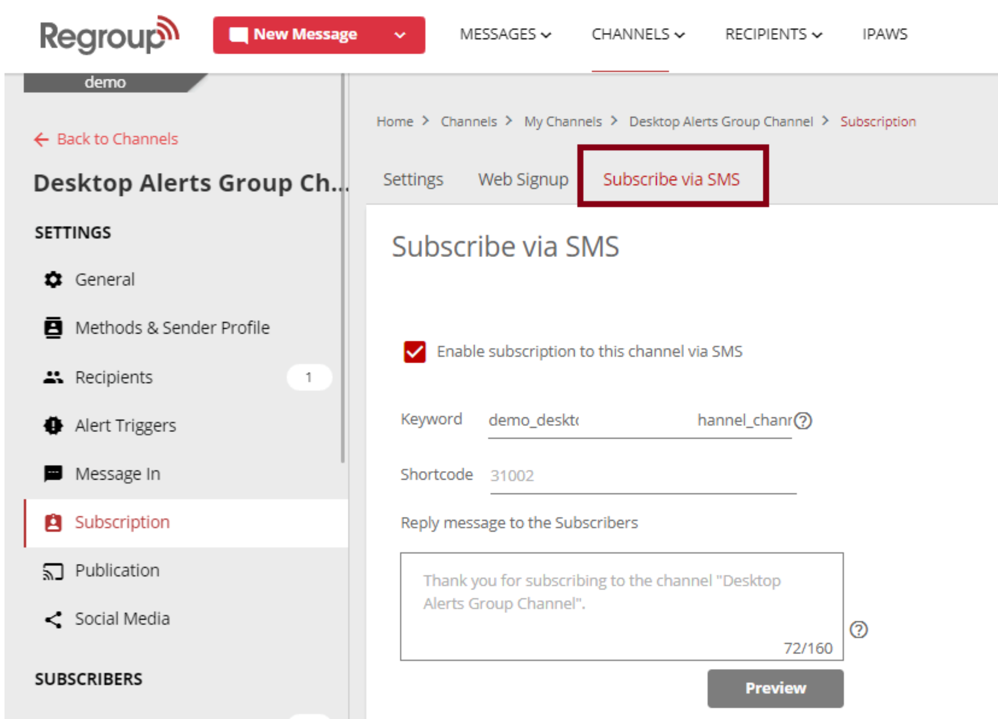
- https://www.qr-code-generator.com/
- https://www.qrcode-monkey.com/
- https://www.flowcode.com/
- https://www.the-qrcode-generator.com/

Set QR Code for Subscription Using SMS

User who scans the QR code set for SMS subscriptions (text to join) bypass the need to enter the shortcode, command, and keyword required for the SMS subscription. Mobile scanning enables them to subscribe to the designated channels.

Here is how you create an SMS subscription QR code:

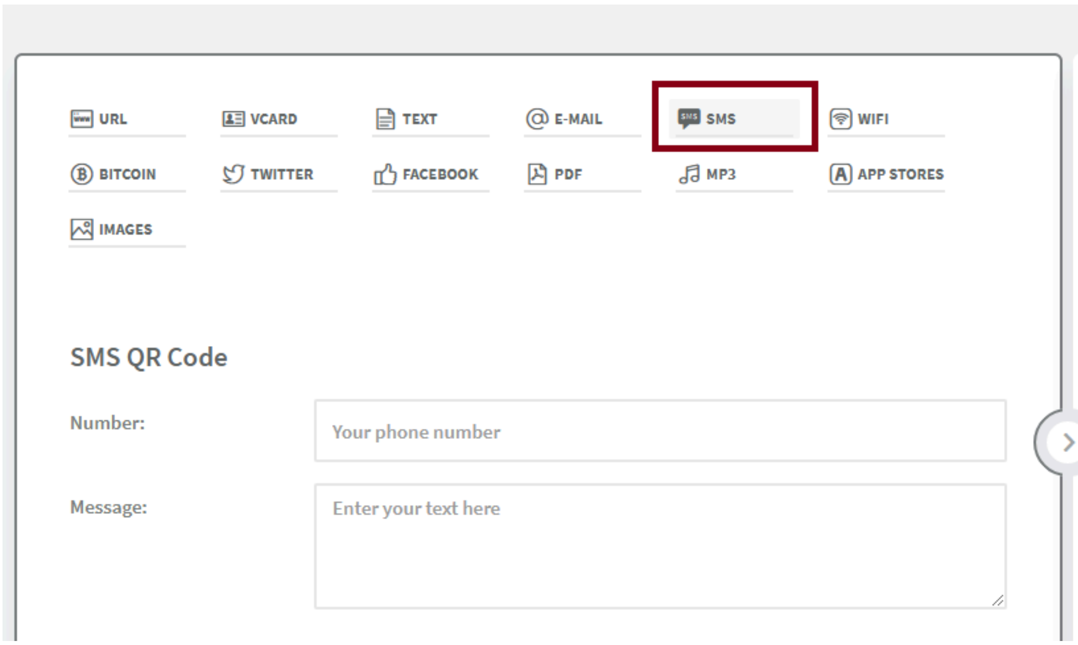
1. Collect the **Keyword** and **Shortcode** from the **Subscribe via SMS tab**. See the topic [Configure Subscription via SMS]() (steps 1-7).



2. Once you have the keyword and phone number (shortcode), navigate to any third-party QR code generators. The following are some options:
   - [https://www.qr-code-generator.com/]()
   - [https://www.qrcode-monkey.com/]()
   - [https://www.flowcode.com/]()

- https://www.the-qrcode-generator.com/

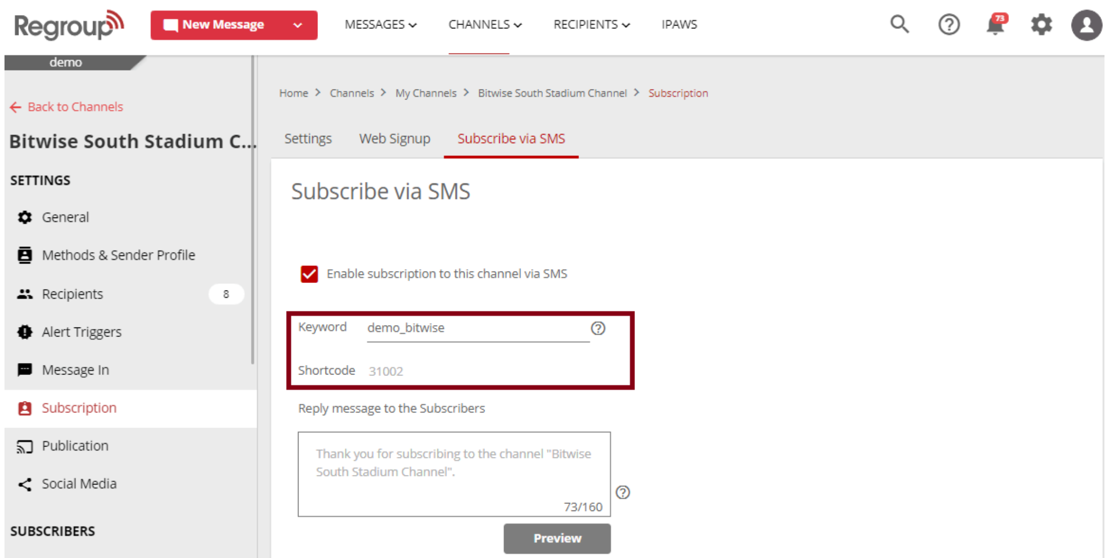
3. On the QR code generator, click **SMS**. See the following image:



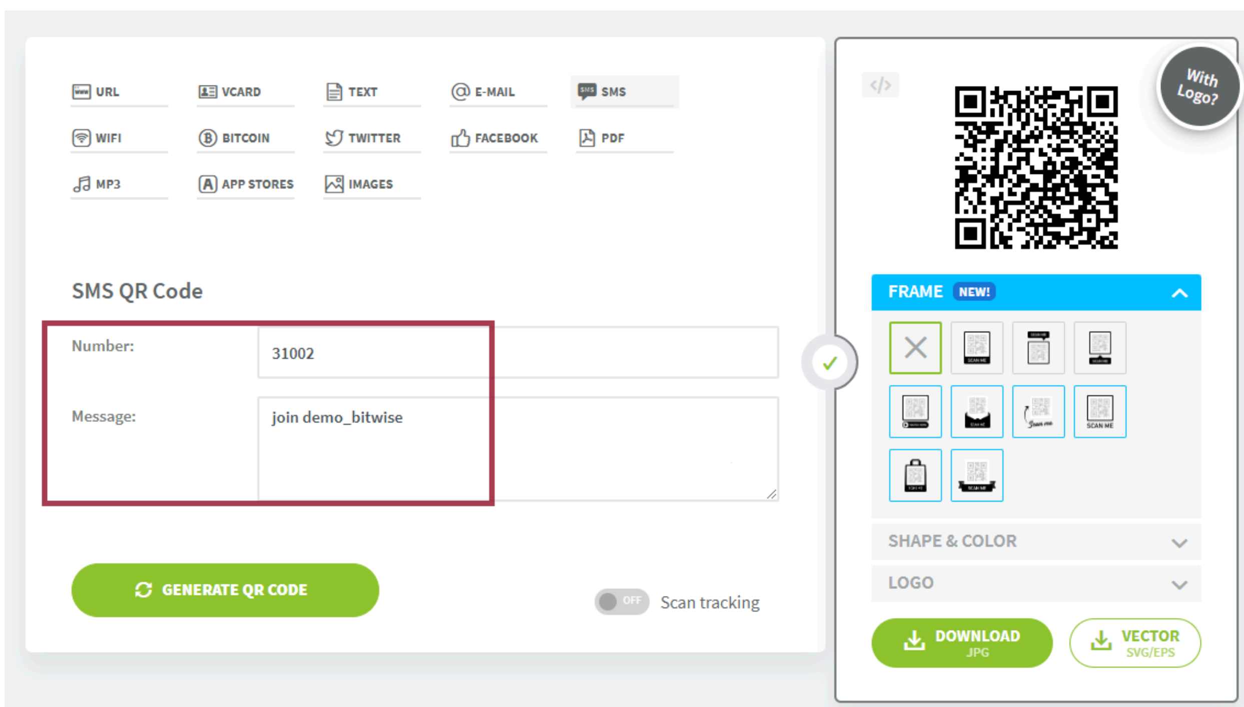
4. Enter the phone number in the **Number** field. The following are phone numbers (this appears as **Shortcode** on the Regroup application):
   - USA 31002
   - Canada 14372914181
   - Panama 62484
   - International 16284332541.

5. Enter the **Keyword** from the Regroup application in the **Message** field. You must enter the Keyword as **join "keyword"** without quotes.

The following image shows Keyword and Shortcode in the Regroup application:

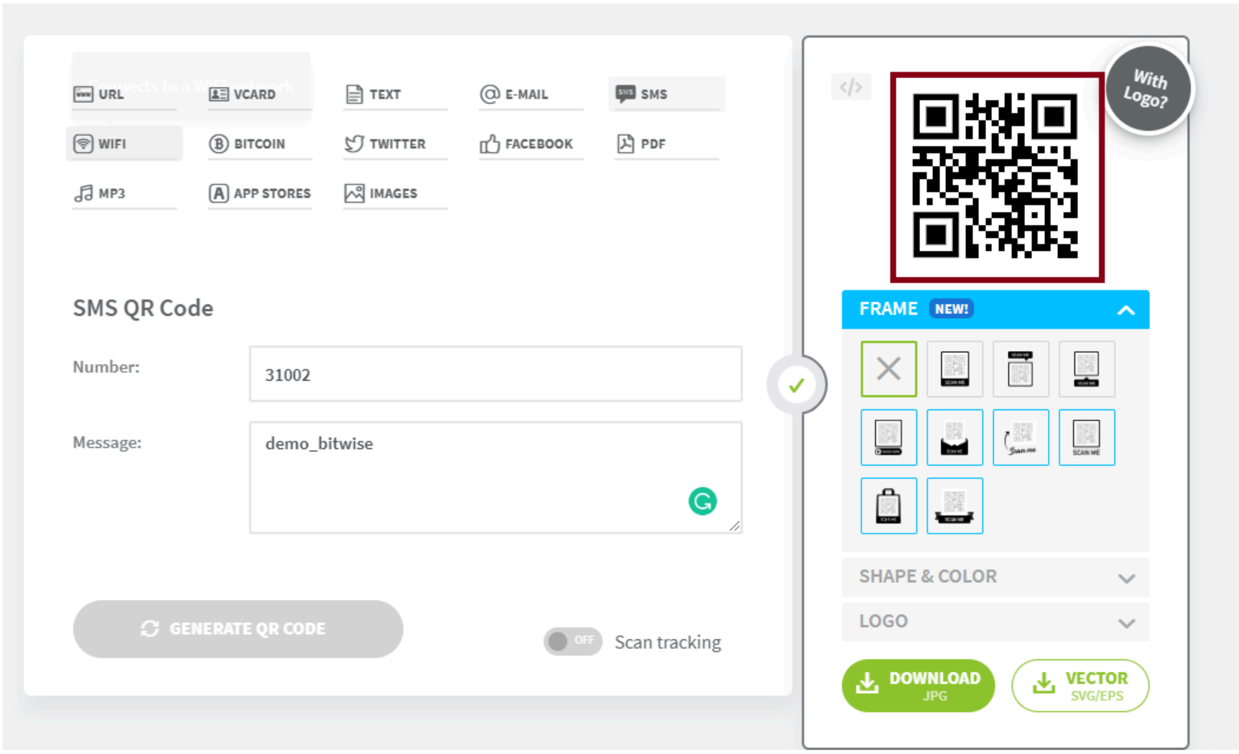


The following image shows the QR code generator with the Shortcode as Number and Keyword (added with join) as Message:



6. Click **Generate QR Code**.

   The generated QR code appears. See the following image:



7. Click **Download** or **Vector** to download the QR code.

   You can share the QR code on a word document or send it as an attachment.

Set QR Code for Web Subscription

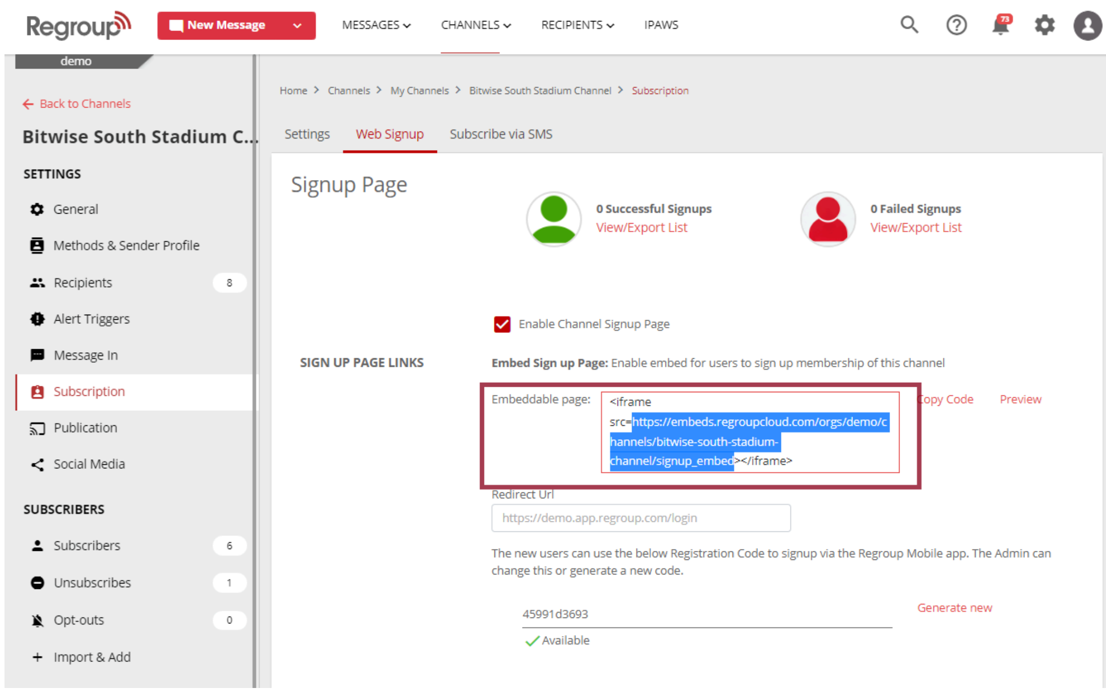
Users who scan the QR code set for web subscriptions can signup to the channel from their mobile devices. After scanning the code, they land on the web signup page, where they can enter their information.

To create a web sign-up QR code:

1. Collect the channel **Sign Up Page Links** from the **Web Sign page**. See the topic [Configure Web Signup](#) (steps 1-7).

   Note: For QR codes, use the link that starts after *src=* and ends inside the iframe.

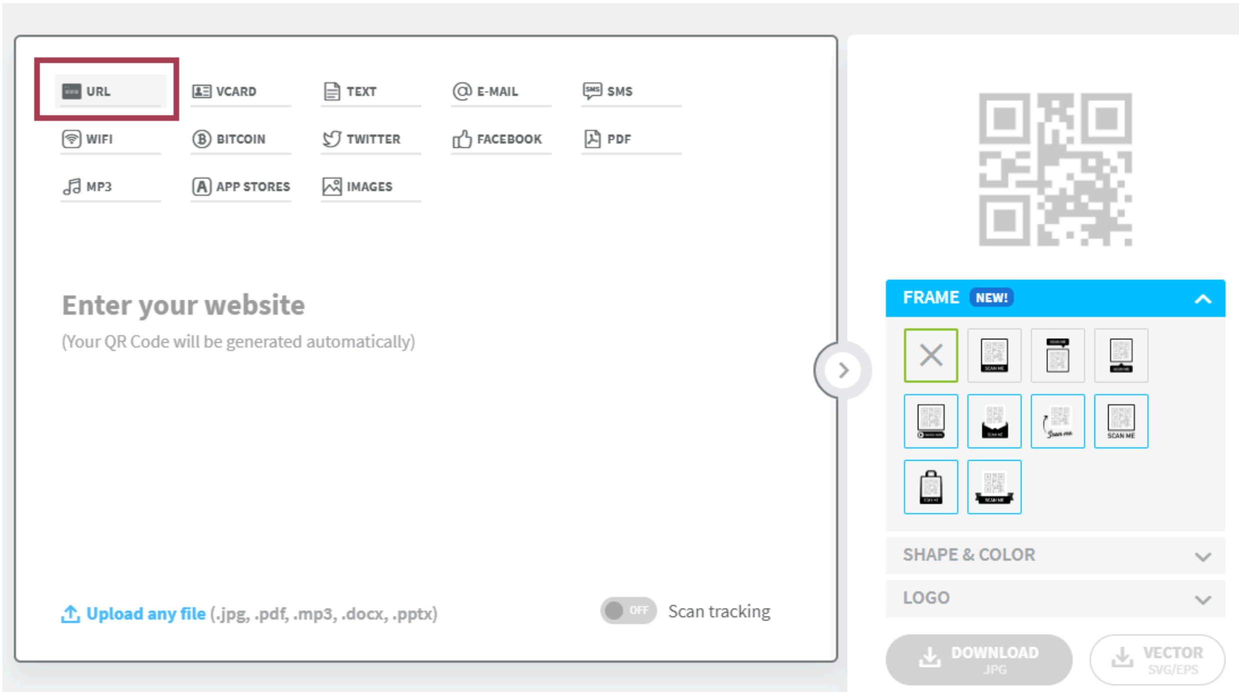
   See the part highlighted in blue in the following image:



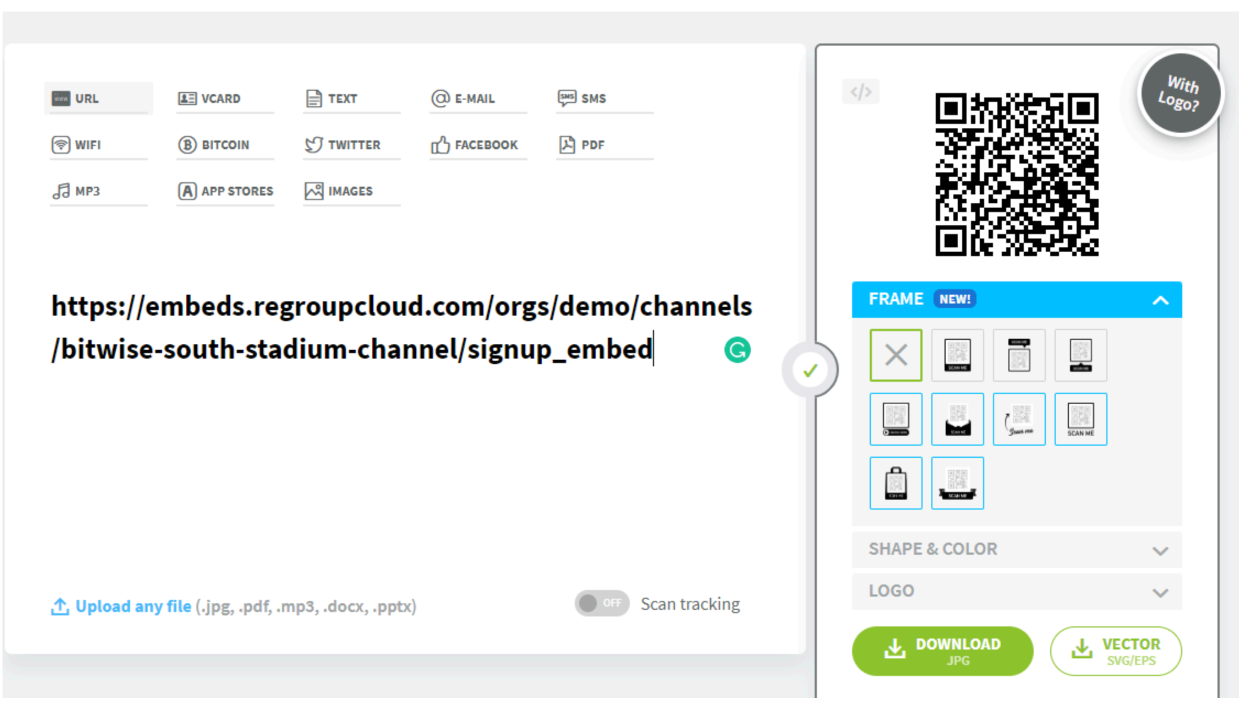
2. Once you have the signup page link for web signup, navigate to any third-party QR code generators. The following are some options:

   - https://www.qr-code-generator.com/
   - https://www.qrcode-monkey.com/
   - https://www.flowcode.com/
   - https://www.the-qrcode-generator.com/

3. On the QR code generator, click to select **URL**. See the following image:



4. Enter the signup page link in the **Enter your website** field. See the following image:



5. Click **Download** or **Vector** to download the QR code.

You can share the QR code on a word document or send it as an attachment.

Manage Subscribers

Manage Subscribers: Overview

The Subscribers section of the channel lists all the channel subscribers. You can edit a subscriber's profile with details, remove them, or promote the subscriber to admin. You can do the following in the Subscribers section:

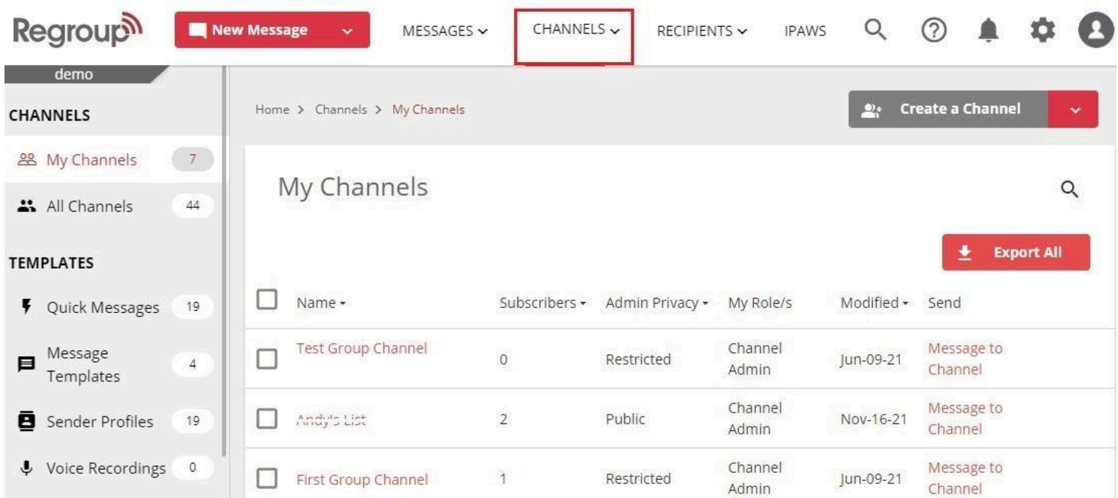
- Modify, delete, or promote a subscriber
- Move subscribers to groups
- Approve pending subscribers

To set up subscribers for a channel, see the topic Setup Subscriptions.

Modify, Delete, or Promote a Channel Subscriber

Here is how you modify, delete or promote a channel subscriber:

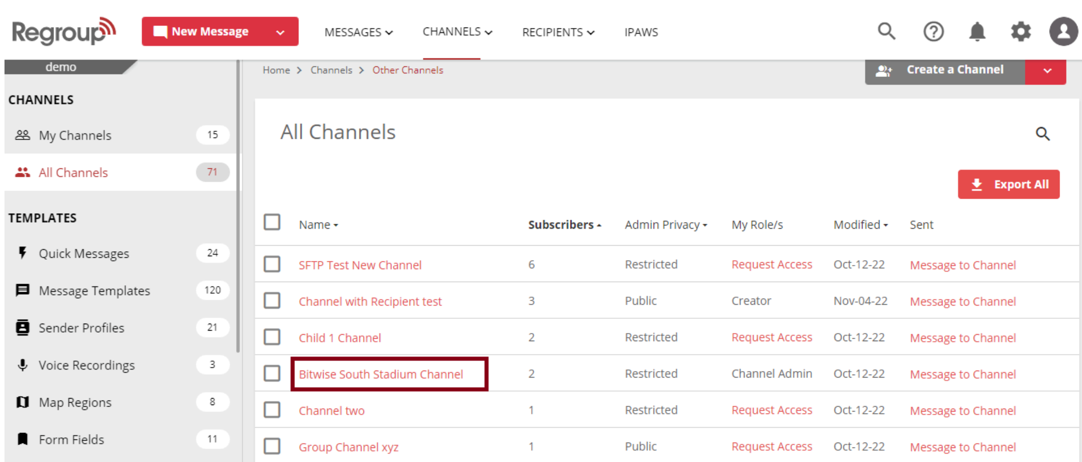
1. Click the **Channels** tab. See the following image:



The **My Channels** page opens.

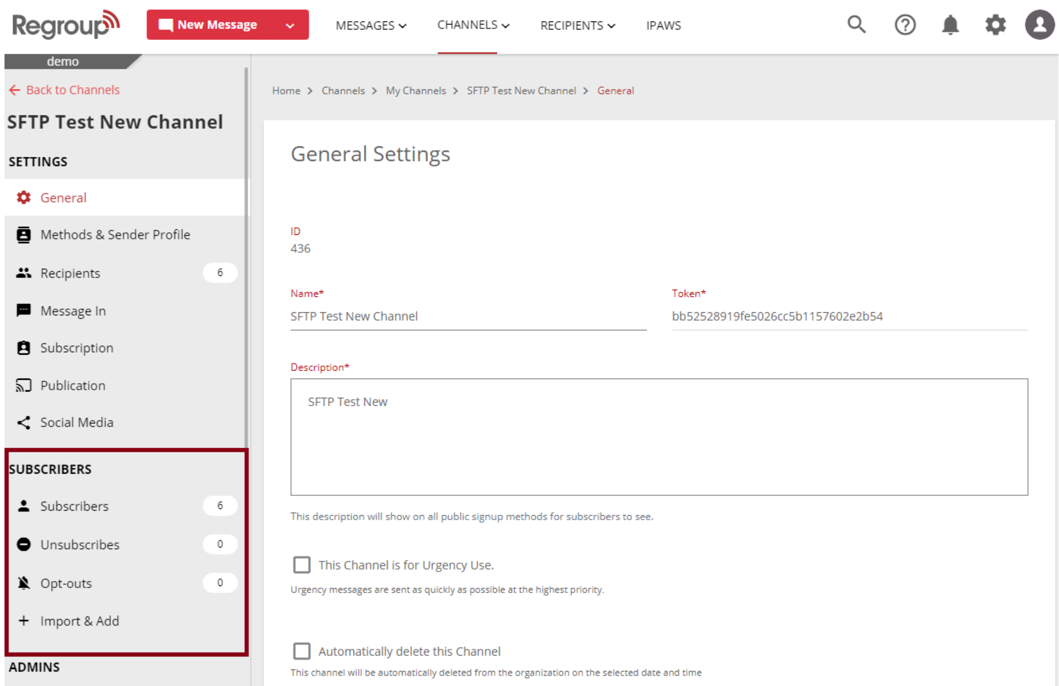
2. Search and locate the channel to manage the subscribers in the **My Channels** tab. The organization admins can manage subscribers of all the channels on the **All Channels** tab.

3. Click the channel's name to open it. See the following image:

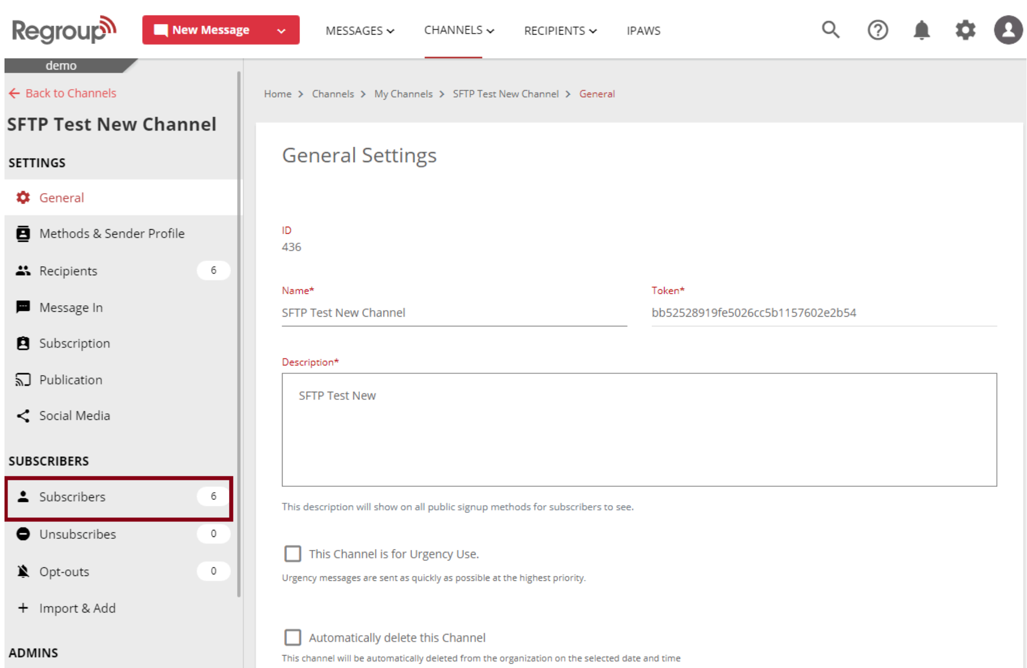


The **General Setting** page opens.

4. On the left navigation panel, scroll down to the **Subscribers** section. See the following image:

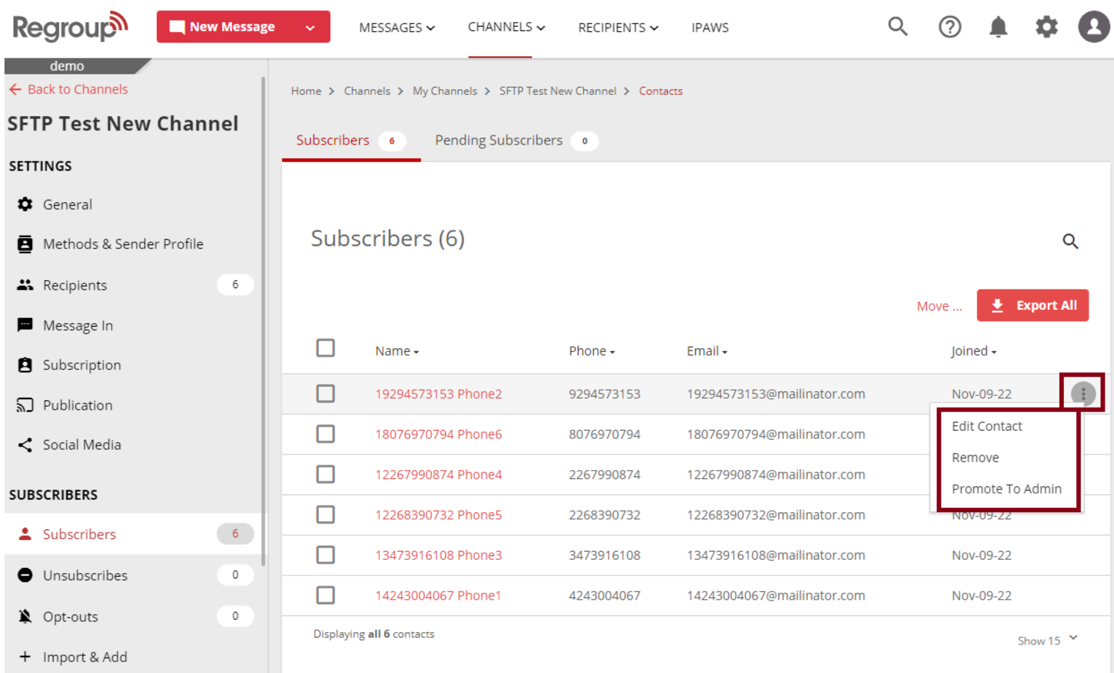


5. Click **Subscribers** under the Subscribers section. See the following image:



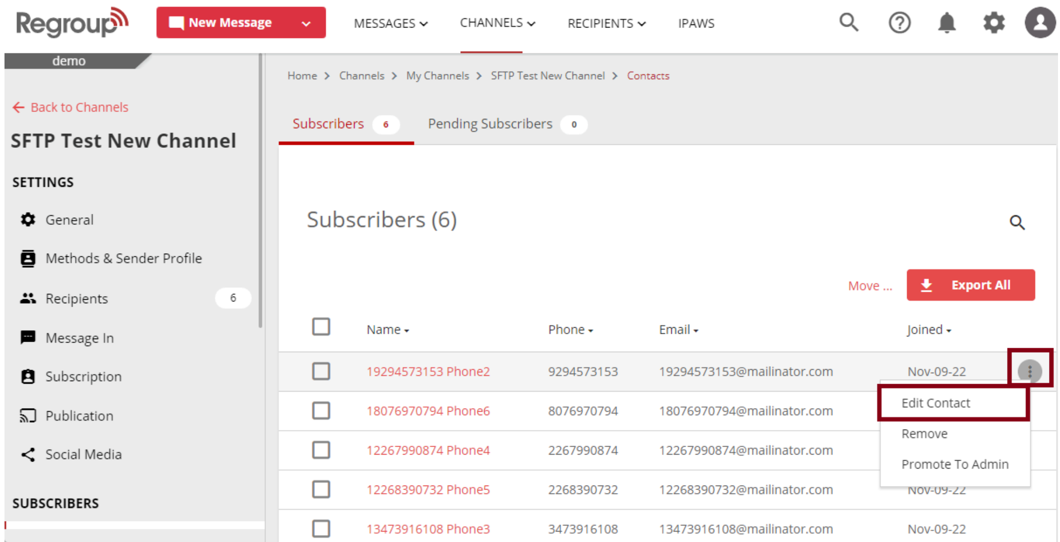
The **Subscribers** page opens with the **Subscribers** and **Pending Subscribers** tabs.

6. Click the vertical ellipsis corresponding to the subscriber you want to manage. You can edit their profile, delete, or promote them to admin here. See the following image:



7. To edit a subscriber’s profile:

a. Click **Edit Contact**. See the following image:



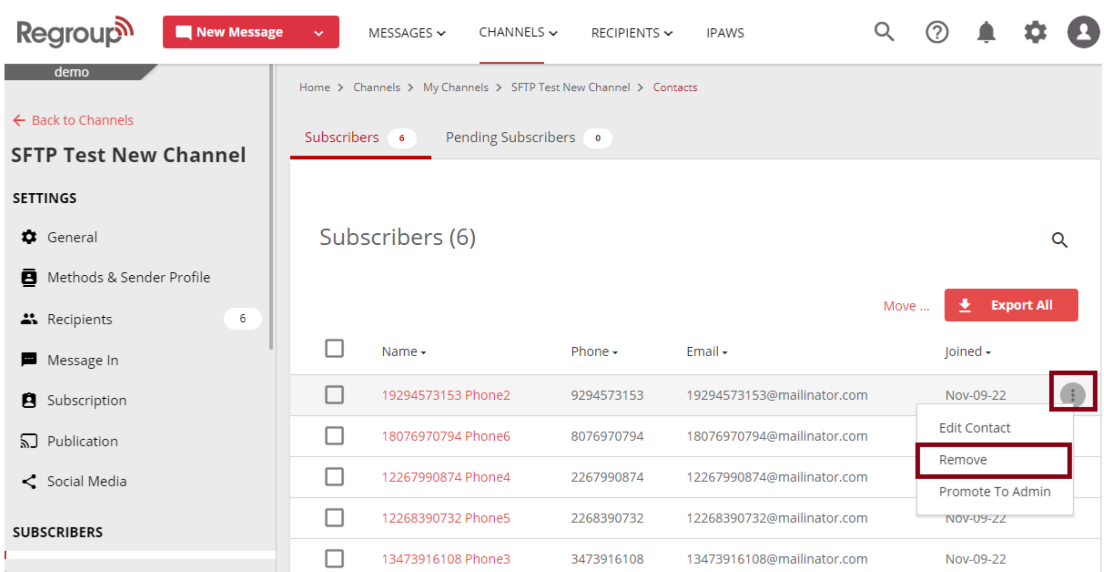
The Subscriber Information page opens.

b. You can update the subscriber profile like how you update a contact profile.

See the topic Update Contact Profile for more details.

8. To delete a subscriber:

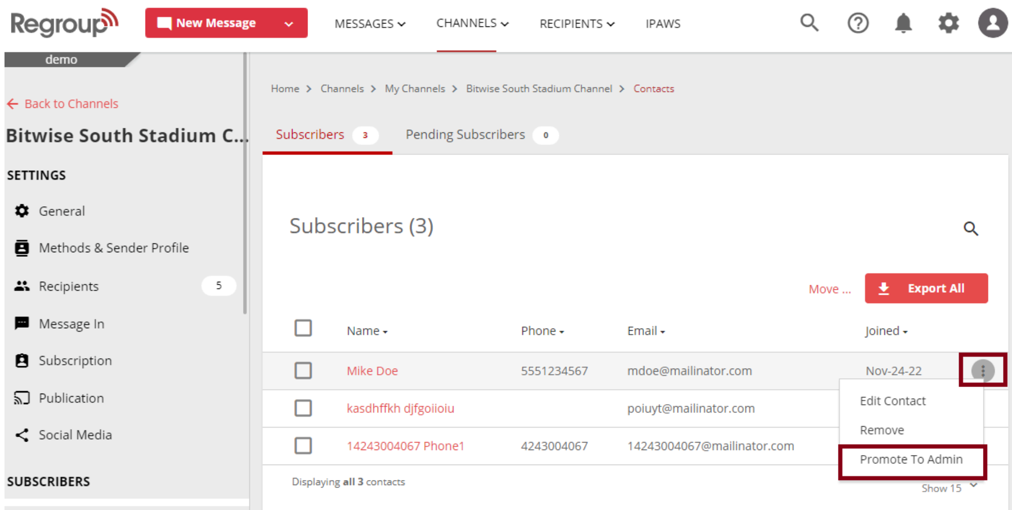
a. Click **Remove**. See the following image:



b. Click **Ok** on the confirmation message.

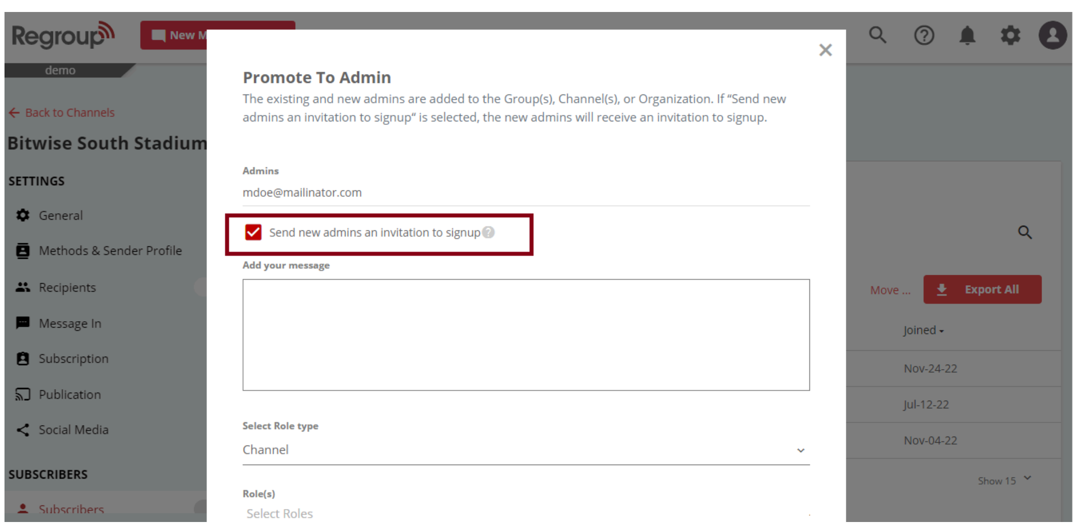
9. To promote a subscriber as an admin of a channel, group, or organization:

    a. Click **Promote To Admin**. See the following image:



The Promote To Admin page opens.

    b. Click the **Send new admins an invitation to signup** checkbox to enable the subscriber to accept or decline the invitation to join as an admin. See the following image:



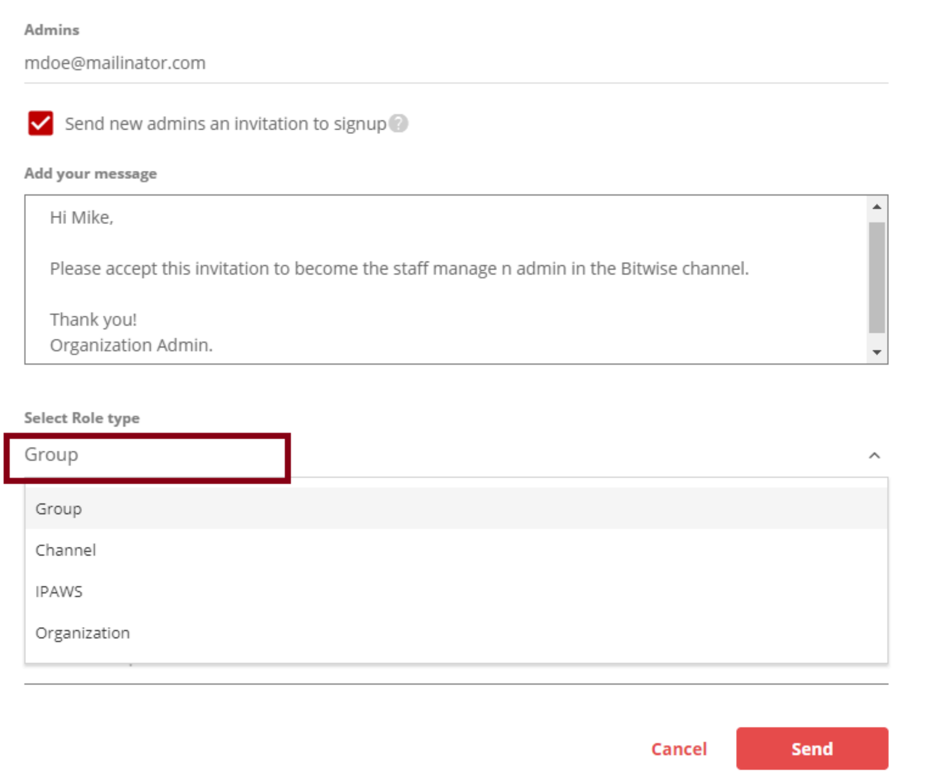
Note: All existing and new admins added to the Group(s), Channel(s), or

Organization without their approval. However, if you select the **Send new admins an invitation to signup** checkbox, the subscriber won't be promoted as an admin until they accept the invitation to become an admin.

c. Enter the invitation message to the subscriber in the **Add your message** field.

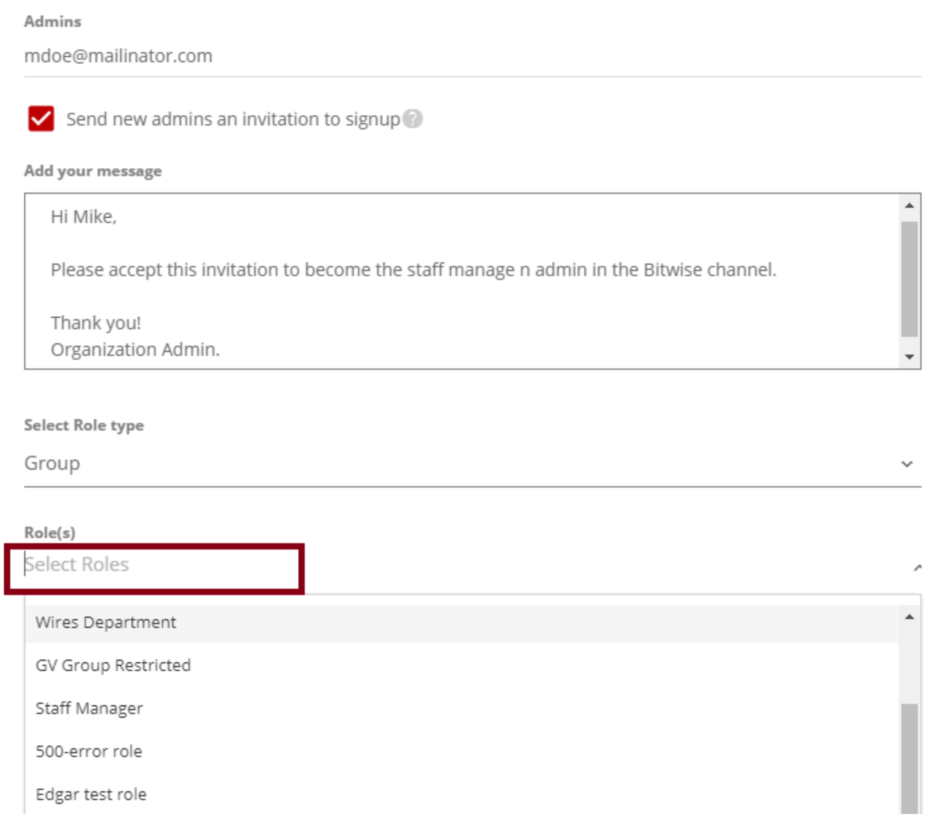
d. Click the **Select Role type** dropdown and select a role type from Channel, IPAWS, Groups, or Organization. Role type is the work area where the admins perform the assigned tasks.

See the following image:



To know more about roles and role types, see the topic: [Admins and Role]s.

e. Click the **Select Roles** dropdown and select the required roles. All the roles in the selected role type get listed. See the following image:



You can add a subscriber to multiple roles. To create custom roles with specific permissions, see the topic: [Create New Roles with Custom Permissions]

f. Click **Select Groups** or **Select Channels** field to assign channels or groups to the new admin.

Tip: This option is available only when you select a group or channel as the role type.

g. Click **Send**.

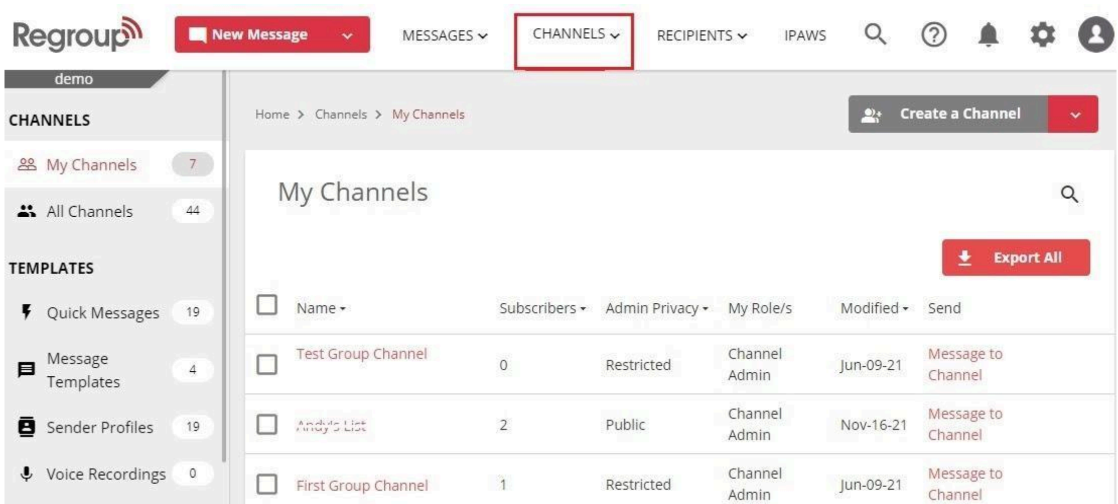
The system now adds the subscriber as an admin. If you have selected the send invite option, the subscriber becomes the admin only when they accept the invitation.

Move Subscribers to Groups

You can move subscribers from one channel to another using the **Move** functionality. When you move a subscriber, they are removed from the current channel and added to a new one. To add a subscriber to more than one channel, open the subscriber profile by clicking their name and adding them to available channels. To know more about adding subscribers to more than one channel, see Update Contact Profile.

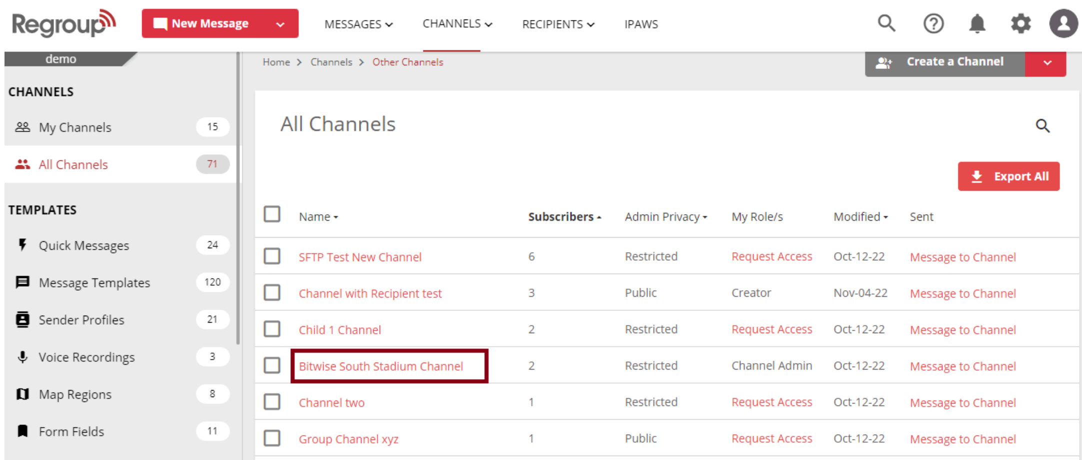
Here is how you move subscribers from one channel to another:

1. Click the **Channels** tab. See the following image:



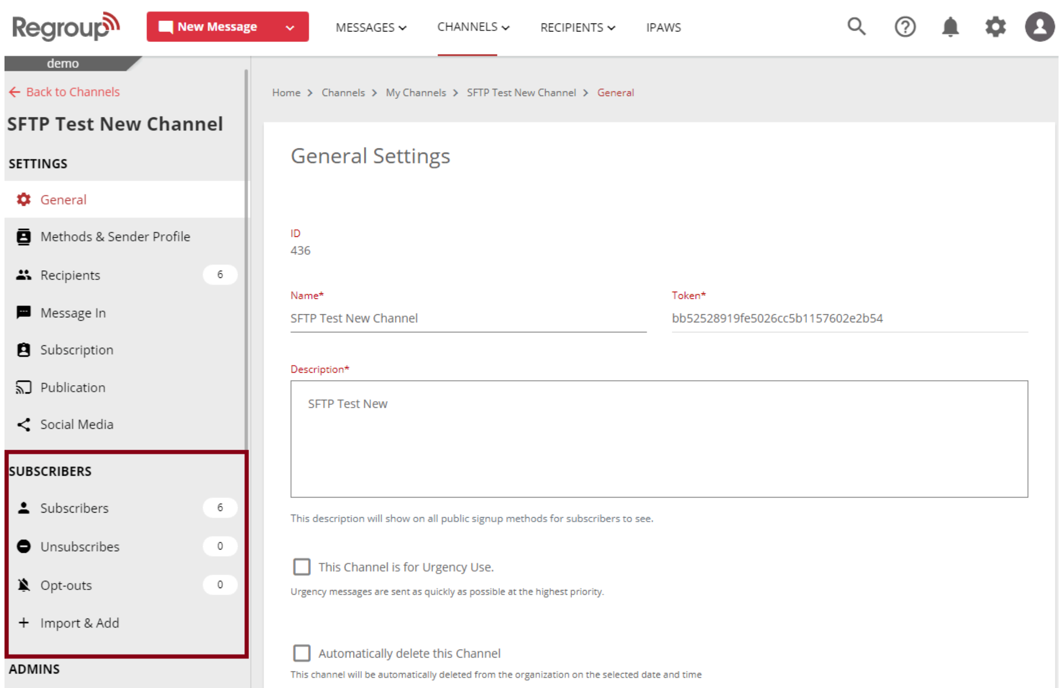
The **My Channels** page opens.

2. Search and locate the channel to manage the subscribers in the **My Channels** tab. The organization admins can manage subscribers of all the channels on the **All Channels** tab.
3. Click the channel's name to open it. See the following image:

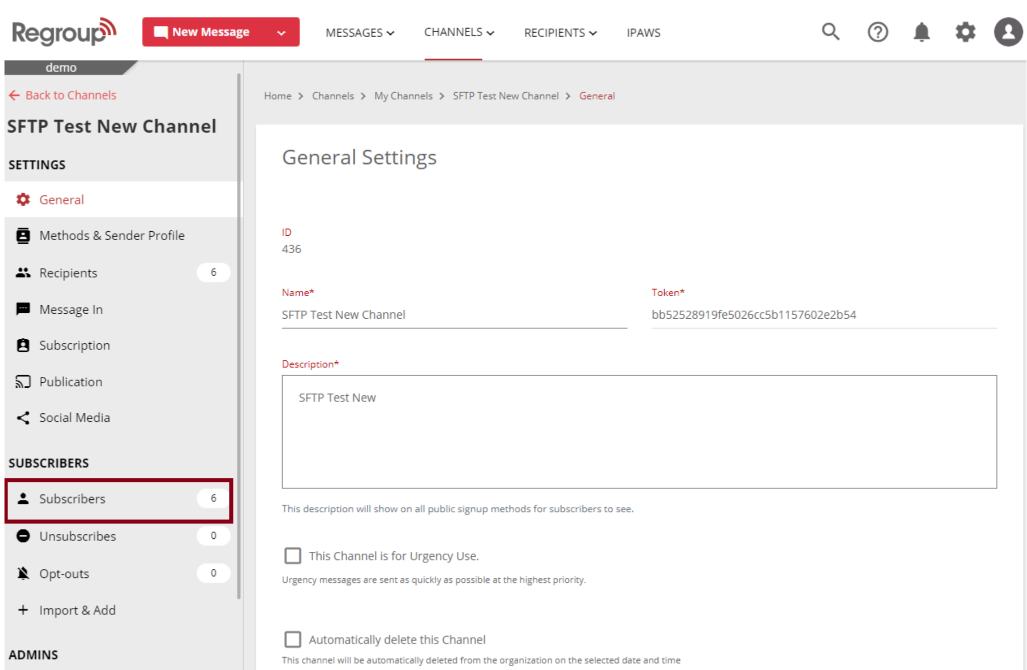


The **General Setting** page opens.

4. On the left navigation panel, scroll down to the **Subscribers** section. See the following image:

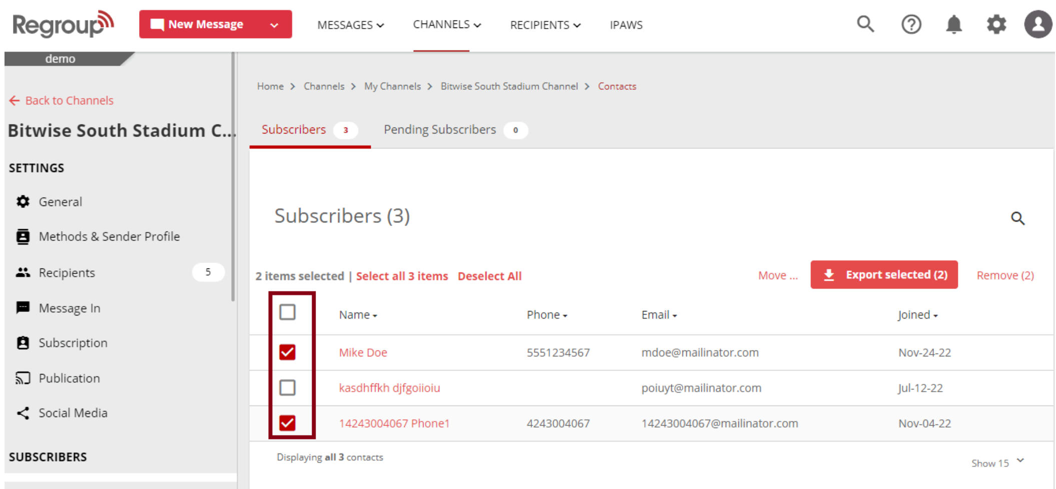


5. Click **Subscribers** under the Subscribers section. See the following image:

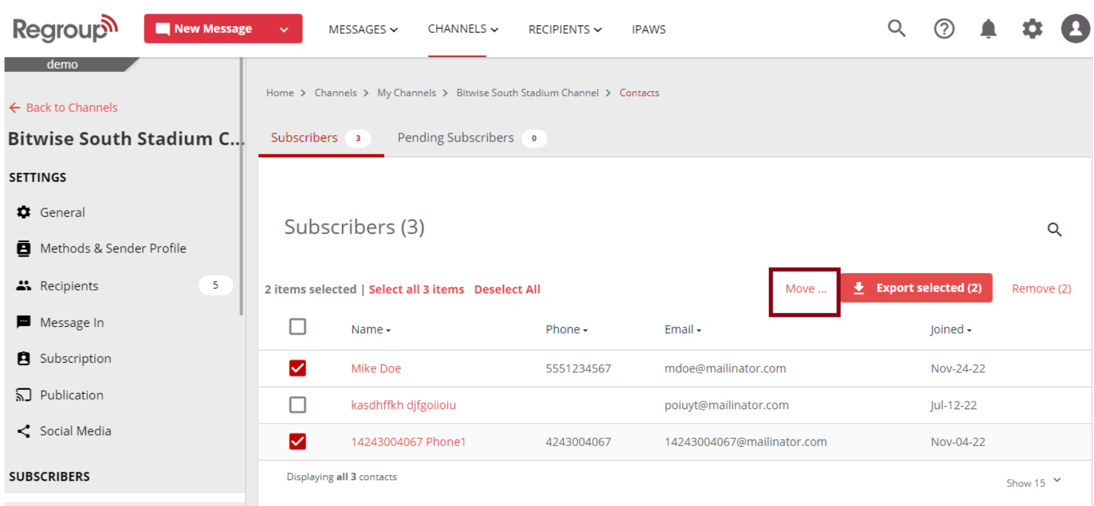


The **Subscribers** page opens with the **Subscribers** and **Pending Subscribers** tabs.

6. Click the selection checkbox corresponding to the contacts you want to move to another channel. See the following image:

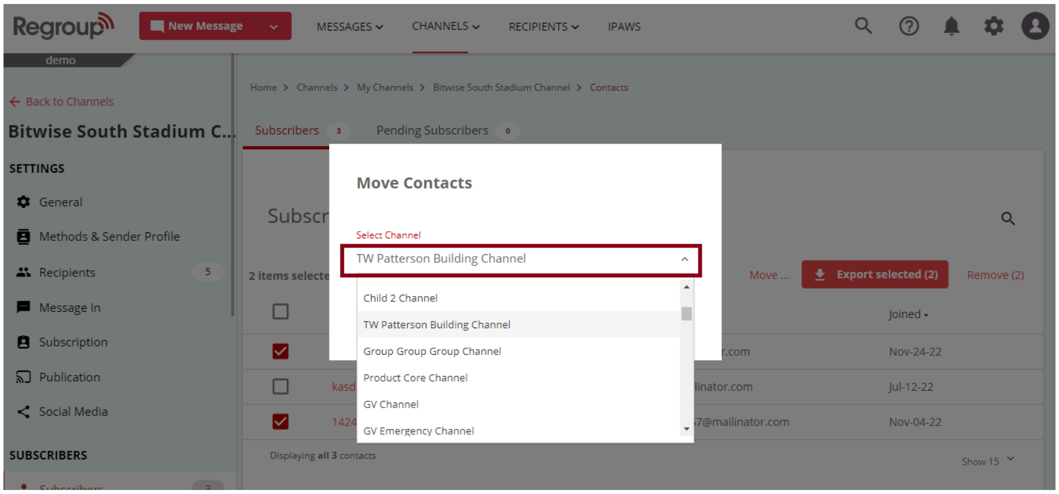


7. Click **Move**. See the following image:



The Move Contacts page pops up.

8. Click the **Select Channel** dropdown and select the channel you want to move the subscriber to as a contact. See the following image:



9. Click **Move**. The selected subscriber is now moved as a contact to the select group.

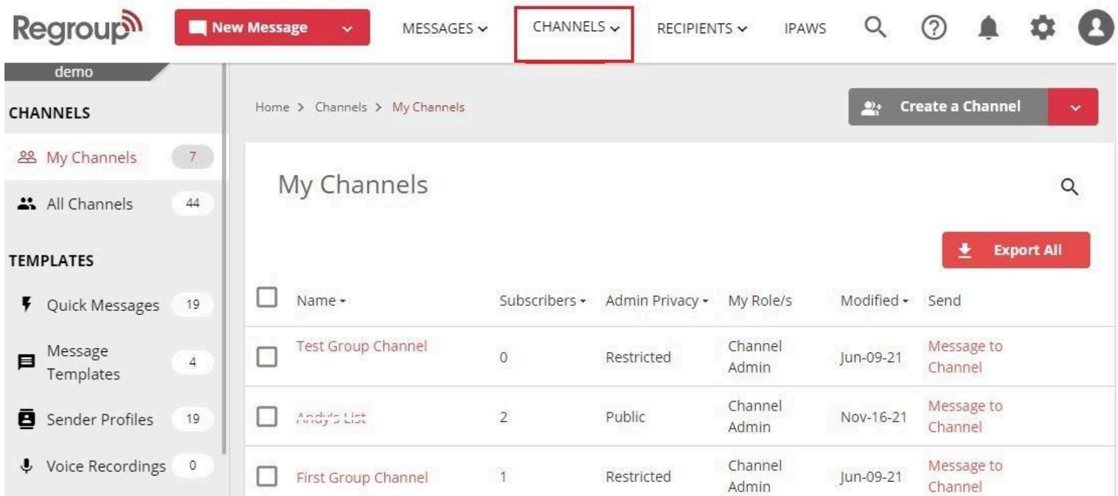
   The selected subscriber is now moved to a channel you chose.

Approve Pending Subscribers

To configure approval for subscription, see the topic Configure General Subscription.

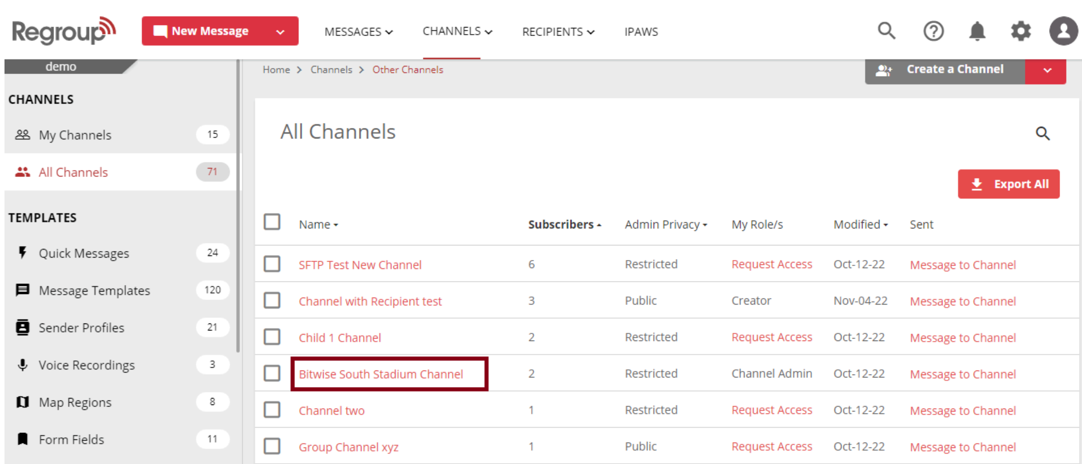
Here is how you move subscribers from one channel to another:

1. Click the **Channels** tab. See the following image:



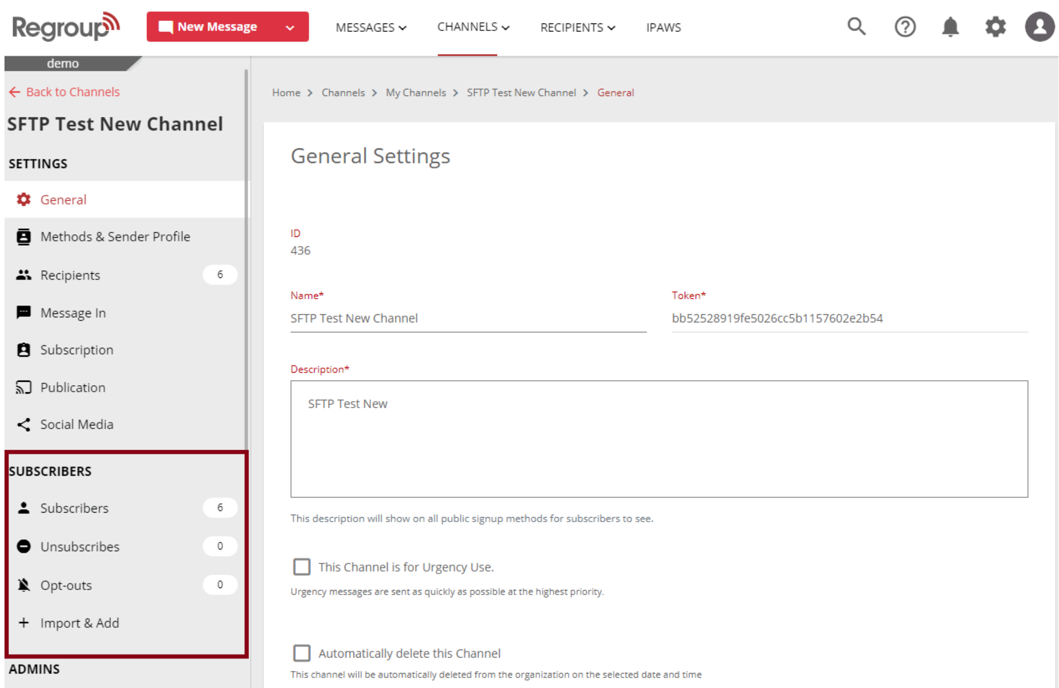
The **My Channels** page opens.

2. Search and locate the channel in the **My Channels** tab. The organization admins can manage subscribers of all the channels on the **All Channels** tab.
3. Click the channel's name to open it. See the following image:

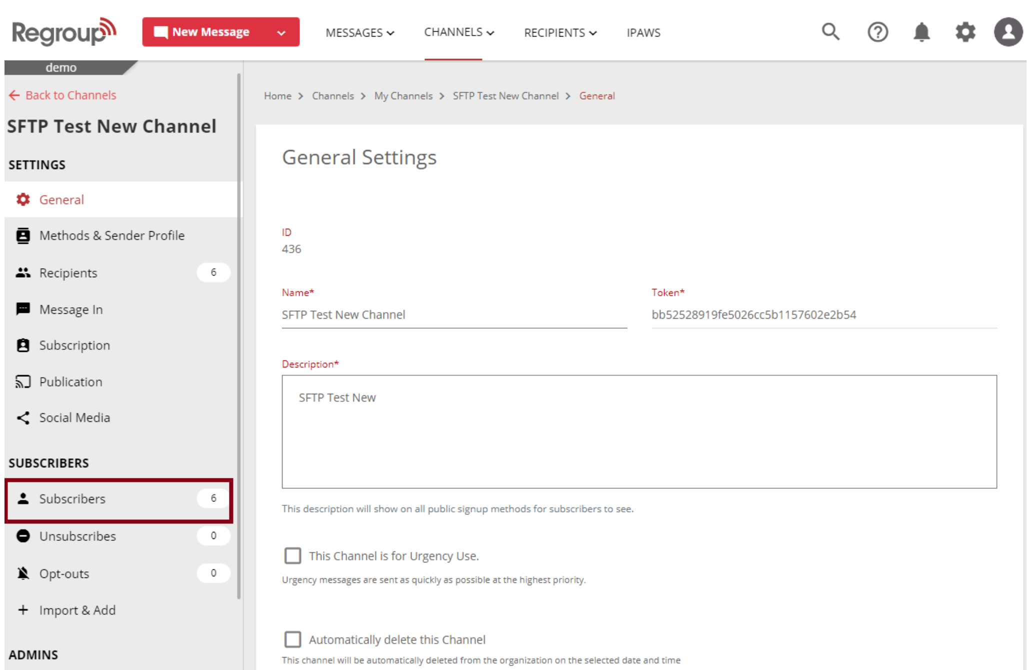


The **General Setting** page opens.

4. On the left navigation panel, scroll down to the **Subscribers** section. See the following image:

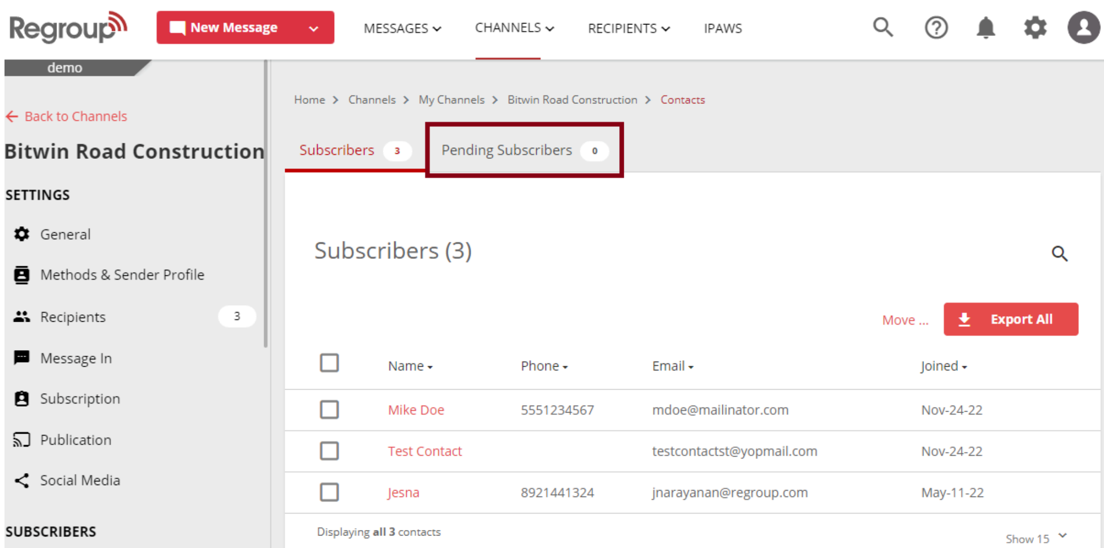


5. Click **Subscribers** under the Subscribers section. See the following image:



The **Subscribers** page opens with the **Subscribers** and **Pending Subscribers** tabs.

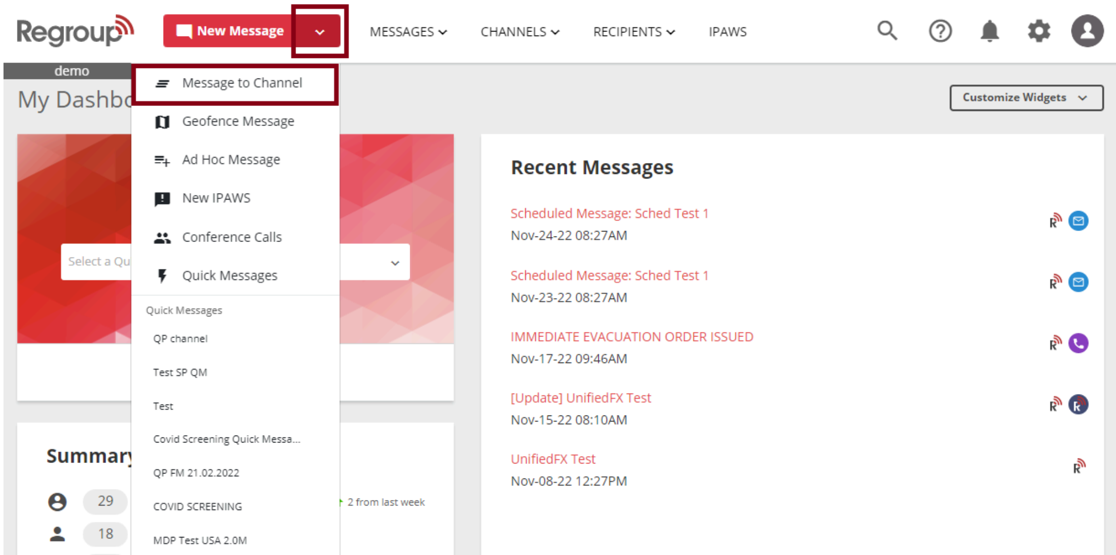
6. Click the **Pending Subscribers** tab to approve a subscription request. See the following image:



You can approve the pending subscription here.

Send Messages to a Channel

You can send messages to any channel by selecting the message to channel option from the New Message dropdown. See the following image:



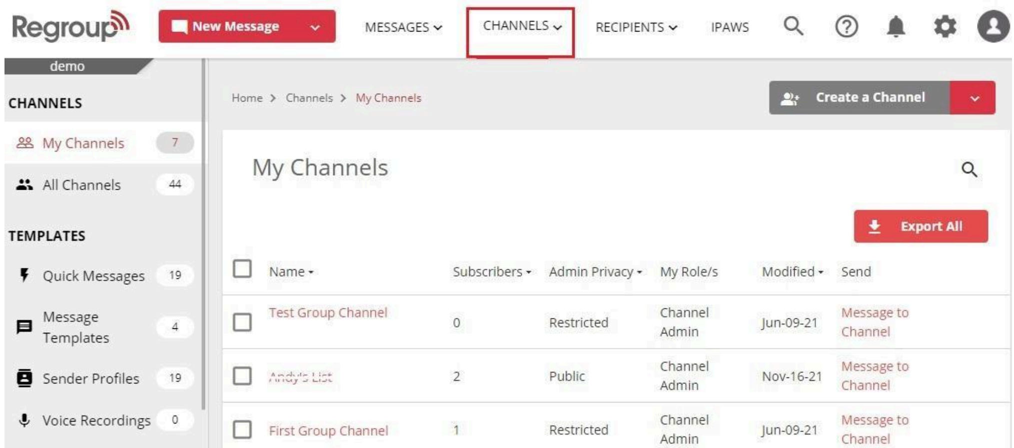
To know more about sending messages, see the topic:

Export all Channels

An organization admin can export details of all the channels in the organization. Group admin can export details of channels they created or is an admin. You can export a CSV with the list of a specific channel attribute, multiple attributes, or all attributes of all the channels.

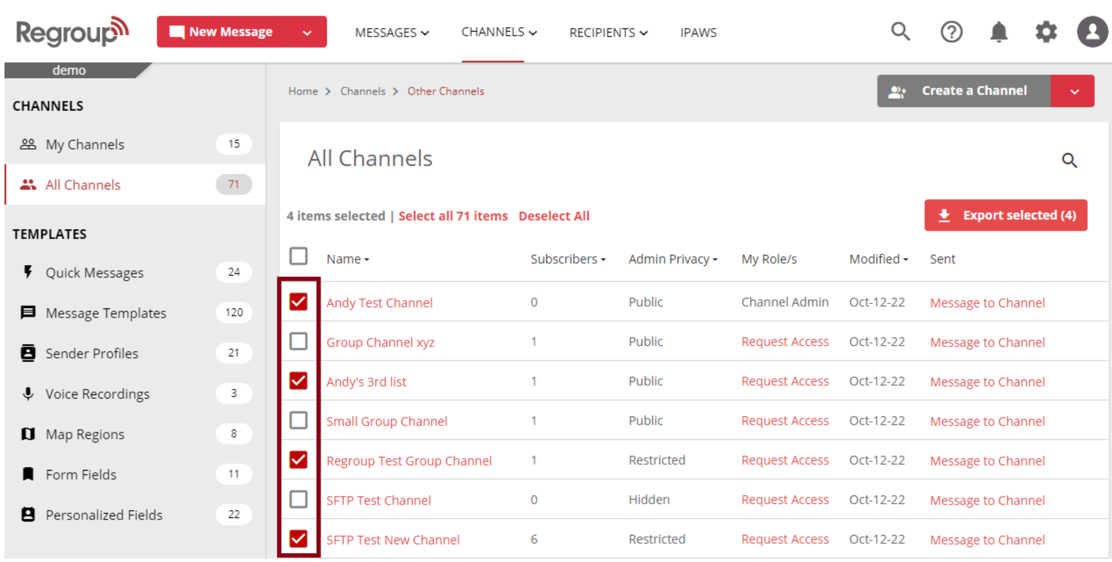
Here is how you export the channel attributes:

1. Click the **Channels** tab. The My Channels page opens. The following image highlights the channels tab:

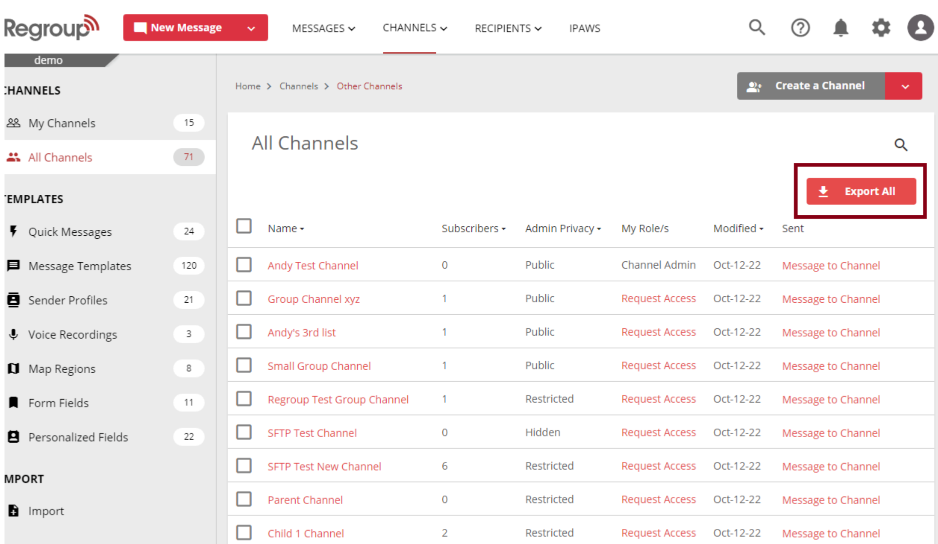


The **My Channels** page opens with the list of channels a channel admin can export.

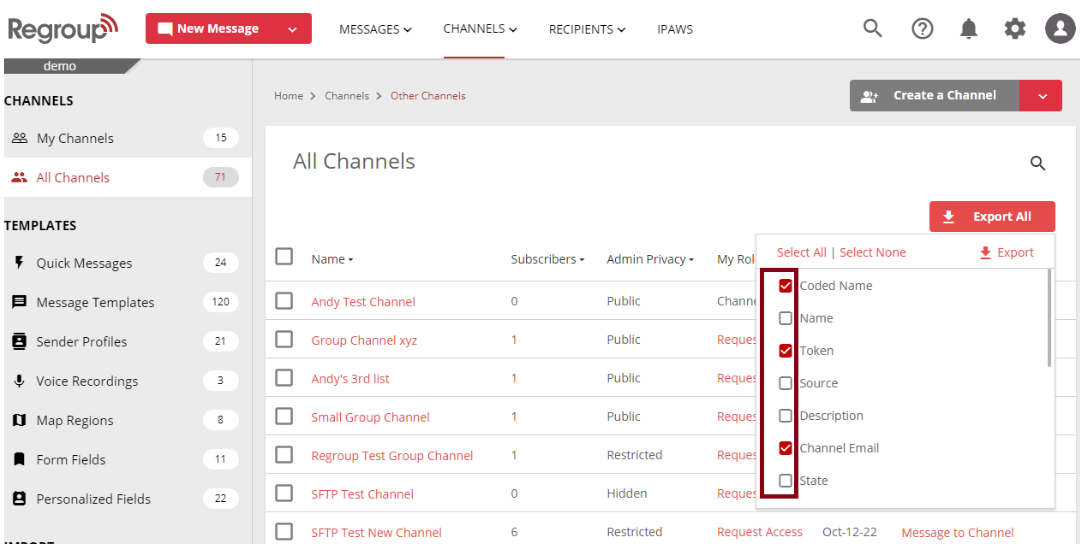
2. The organization admins can click **All Channels** tab to export all the channels in your organization.
3. Click the checkbox corresponding to the channels of which details you need to export. See the following image:



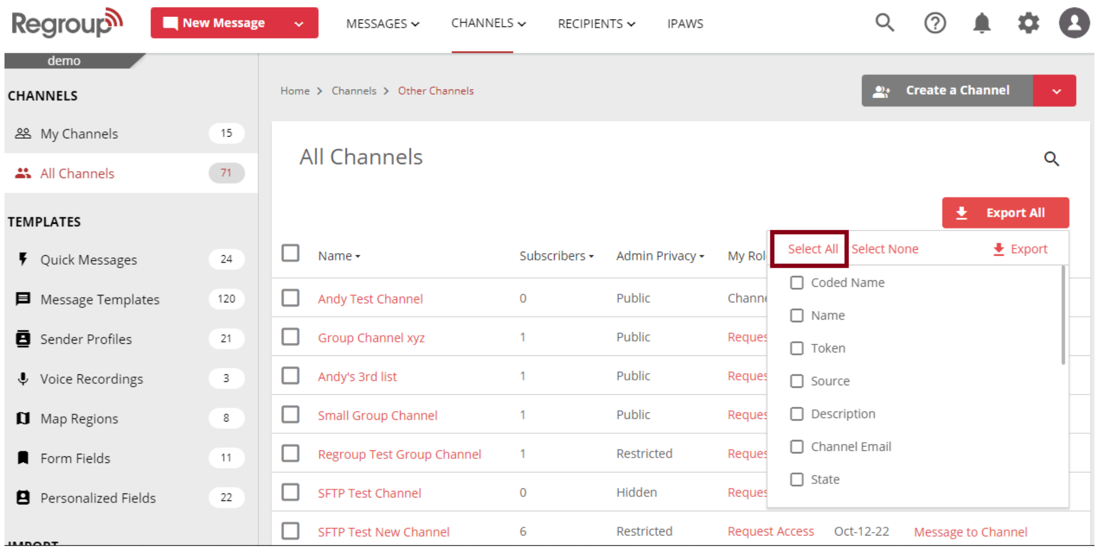
4. If you need to export details of all channels, click **Export All**. See the following image:



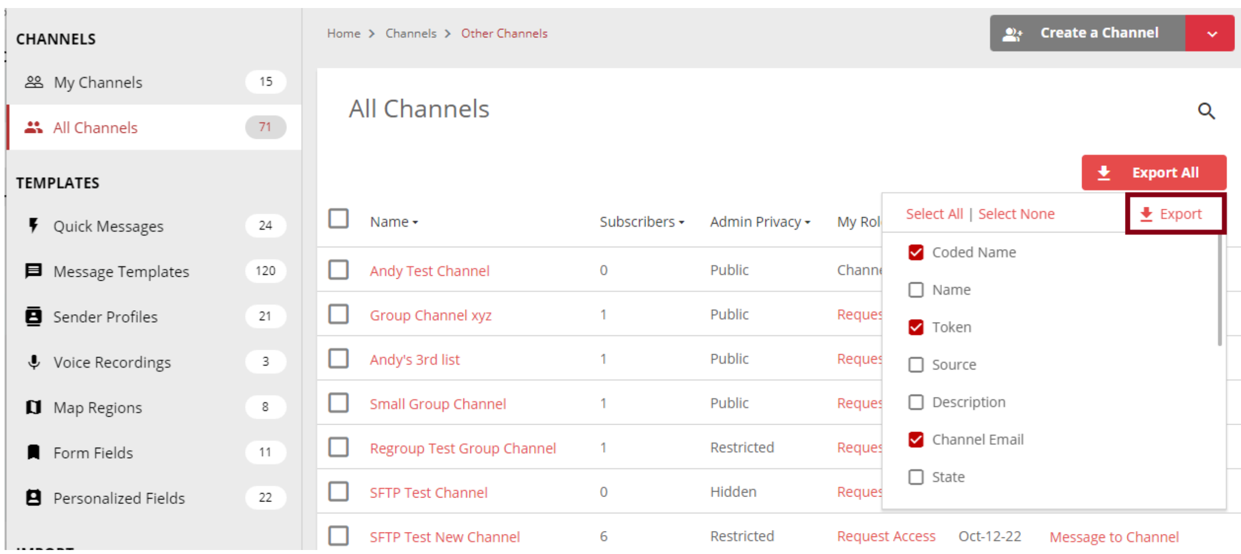
5. Click checkboxes corresponding to each attribute you want to export for all selected channels. See the following image:



6. Click **Select All** to export all the channel attributes into a CSV. See the following image:



7. Click **Export**. See the following image:



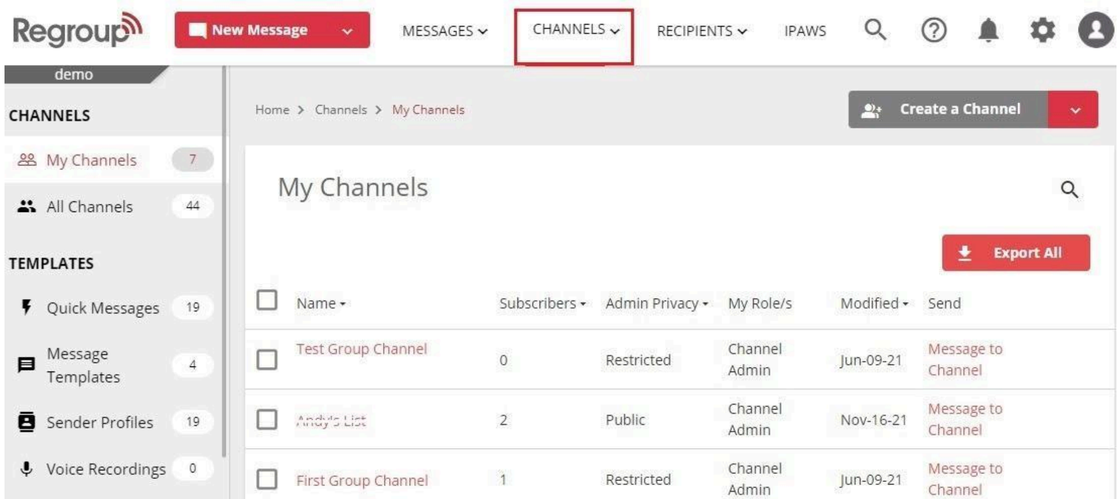
The CSV with selected attributes per channel is downloaded to your computer.

8. Click **Save** to save the file to your local system.

Modify Existing Channel

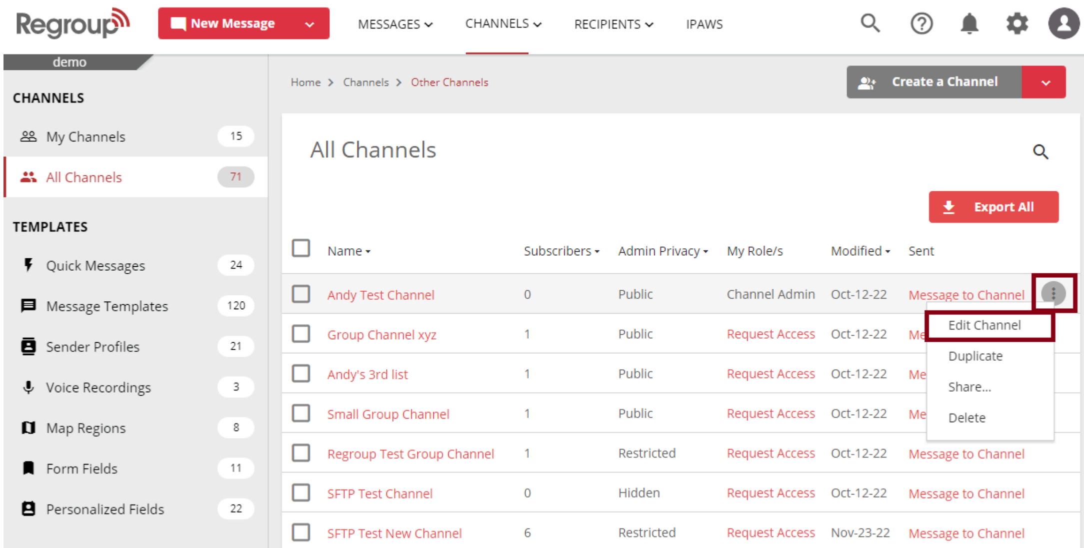
Here is how you update an existing channel:

1. Click the **Channels** tab. See the following image:



   The **My Channels** page opens.

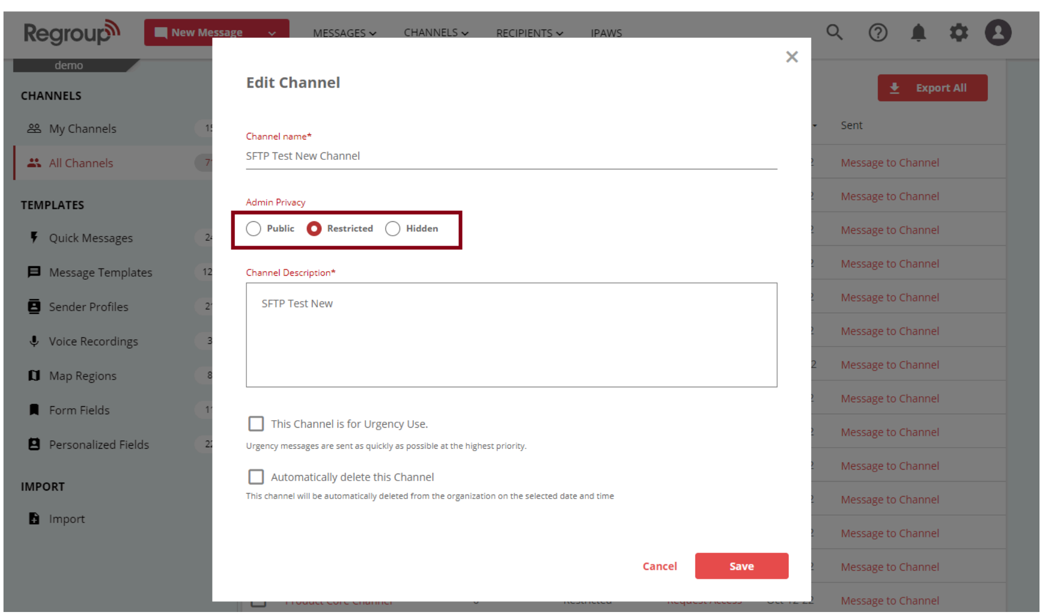
2. Search and locate the channel to update in the **My Channels** tab. The organization admins can edit channels on the **All Channels** tab too.
3. To set up the channel entirely, you can click open the channel's name. To set up further, see the topic [Configure the General Setting of a Channel](#).
4. To update the basic details of the channel, click the vertical ellipsis corresponding to the required channel and click **Edit Channel**. See the following image:



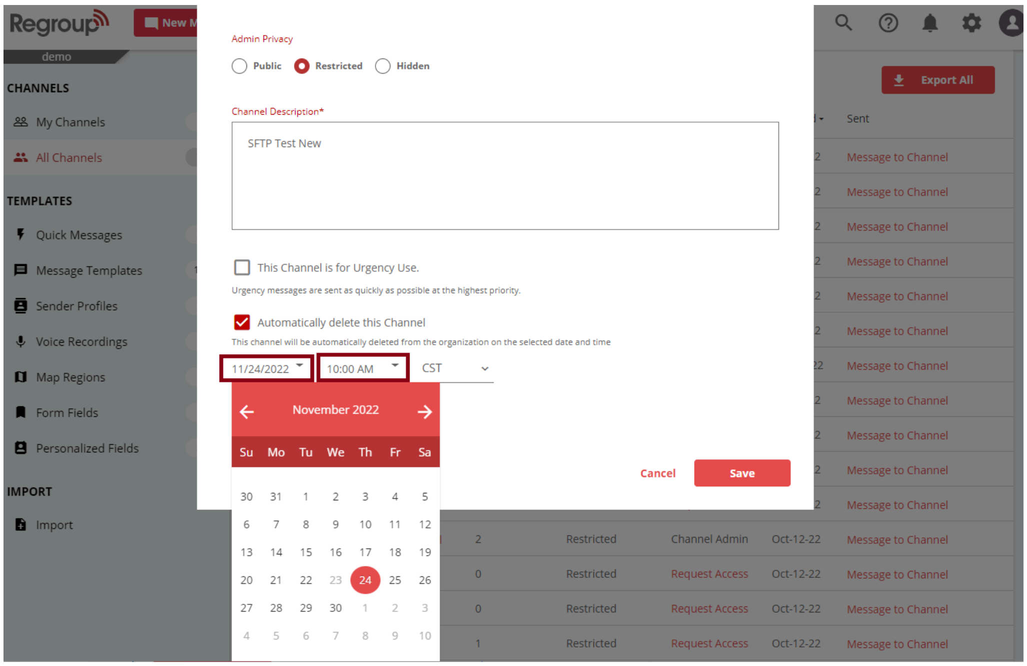
The **Edit Channel** page opens.

5. You can click to update the **Channel Name** and **Channel Description**.
6. You can change the Admin Privacy of the channel by selecting **Public**, **Restricted**, or **Hidden** as required.

   See the following image:



7. Click **This Channel is for Urgency Use** checkbox to send all the messages from this channel with the highest priority.
8. Click **Automatically delete this Channel** checkbox to delete this channel on a selected time and date. See the following image:



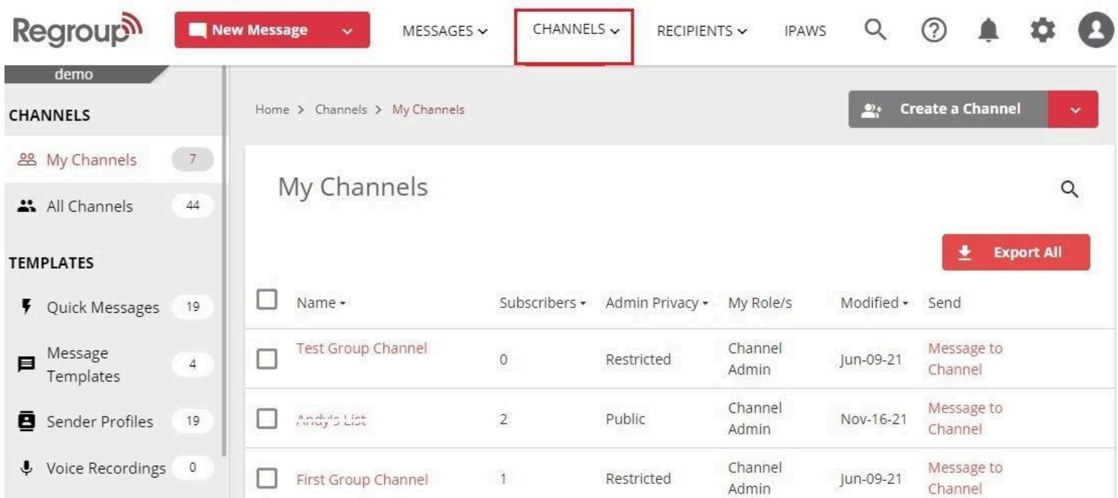
Tip: You can exit the time or date selection by clicking the time field.

9. Click **Save** to save your changes.

Delete a Channel

Here is how you delete a channel:

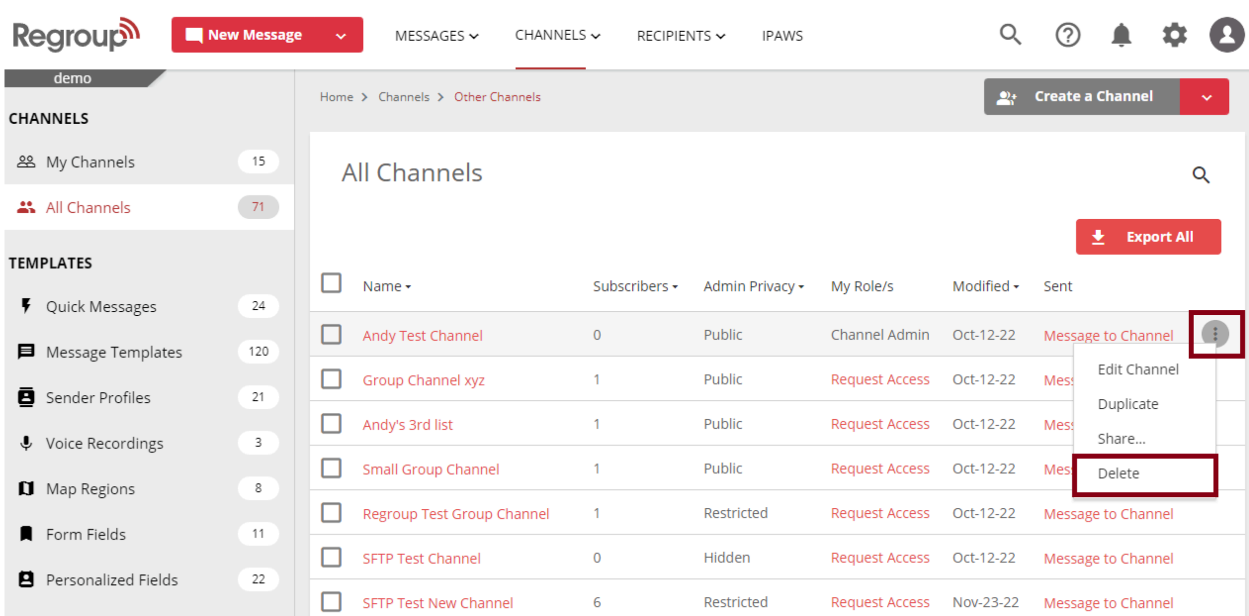
1. Click the **Channels** tab. See the following image:



The **My Channels** page opens.

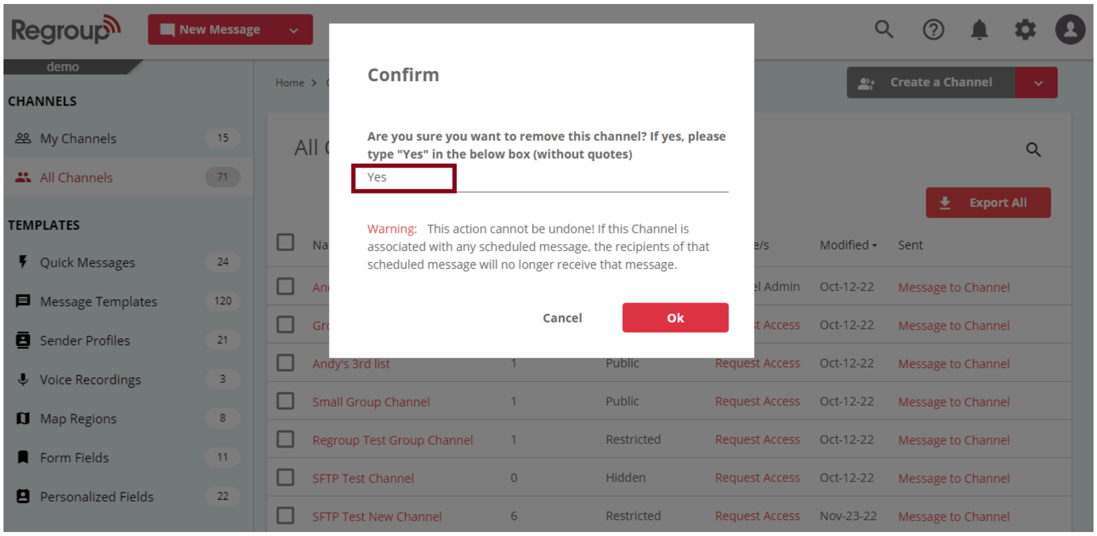
2. Search and locate the channel to delete in the **My Channels** tab. The organization admins can delete channels on the **All Channels** tab too.
3. Click the vertical ellipsis corresponding to the required channel and click **Delete Channel**.

   See the following image:



A confirmation message opens.

4. Enter **Yes** in the text field to confirm the deletion. See the following image:



5. Click **Delete**.

You get a message confirming the deletion of the channel.