

Cleo Stream[®]

Cleo Stream[®] Notify User Guide

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1

Introducing Cleo Stream® Notify

The Cleo Stream software is a Microsoft Windows-based fax processing platform that provides a complete range of advanced voice and fax capabilities. This guide focuses on the voice capabilities of the Cleo Stream software, which we refer to as Cleo Stream Notify.

Use the Cleo Stream Notify system to create messages and send them to contacts or contact groups, either immediately or at a time you schedule in the future. Your messages can be delivered as electronic files using email or fax, or as audio files using phones (mobile or land line). You can create a new message, or select an existing, ready-to-send message.

Options available for sending a message are specific to the distribution method chosen for the message. For example, a message distributed using email will not have the same options available as a message distributed using phone.

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Sending a message

With Cleo Stream Notify software, you can send a message using a five-step launch process or the express launch process.

- Use the *five-step launch process* for maximum flexibility when sending messages.
- Use the *express launch* process to see all your message information on one page.

Using Five-Step Launch

The Cleo Stream Notify Five-Step Launch allows maximum flexibility in creating and sending your message.

To begin the Five-Step Launch, access the **Messages** page and click **New Message**. From here, perform the following steps:

1. *Select message distribution methods.*
2. *Build your message.*
3. *Specify who to send the message to.*
4. *Select message options.*
5. *Review and send your message.*

Specify distribution information

Select one or more methods to distribute your message.

1. In the **Message Title** field, enter a name for your message.
Cleo Stream uses the value you enter in this field to identify this message throughout the product.
2. Select one or more distribution methods. Choose from the following:
 - **Phone**
 - **Cell**
 - **Fax**
 - **Email**
 - **Text Messaging**
 - **Pager**: If you select **Pager**, you must select at least one pager type: **Text** or **Numeric**.

Your message will be distributed using all of the chosen methods. The method used for delivery for each user will depend on the method configured by the user.

3. Optionally, select **Survey**. This option is only enabled if one or more surveys are available in the system.

When you select **Survey**, the only distribution methods available are phone and cell. If you selected other distribution methods, they are cleared when **Survey** is selected.

If you select **Survey**, Cleo Stream software displays a menu on the **Options** page to select the survey to be distributed with your message. You can only select an existing survey file. See *About surveys* on page 27.

4. Click **Continue**.
The **Message** page appears.
5. Build the body of your message. See [Specify message information](#) on page 8.

Specify message information

Compose the body of the message.

1. Enter a subject for the message in the **Subject** field.
The contents of the **Subject** field appears in the cover page for a fax or the subject field in an email.
2. Create or browse to content for your message. The type of content to provide for the message depends on the distribution methods selected.

If **fax**, **email**, or **text messaging** are specified as the distribution method, choose one of the following:

- **Create From Text**: opens a text editor in which you can enter your message text.
- **Import From File**: displays a **Choose File** option, which opens a file browser in which you can navigate to the file to use as the source of your text message.
- **Import From Template**: displays the **Message Template** menu from which you can choose an existing message template. See [About templates](#) on page 23.

If **phone** or **cell** are specified as the distribution method, choose one of the following:

- **Convert Message Above**: converts the text selected above into an audio message that Cleo Stream can play for your recipients.
- **Select Audio Recording**: displays a menu from which you can choose a pre-recorded audio file from a list of files created in the Cleo Stream application or imported and saved in Cleo Stream. See [About audio recordings](#) on page 24.
- **Record a Message**: displays instructions for recording a message over the phone and displays a field where you can enter a description of the message you record.

If you specified a **numeric pager** as a distribution method, enter a value in the **Call Back Number** field.

3. Click **Continue to Message**.
The **New Message - Contact(s)** page appears.
4. Specify the recipients of the message. See [Specify contact information](#) on page 8.

Specify contact information

Specify contacts to send the message.

Specify one or more contacts and contact groups to receive messages.

1. Specify message recipients:
 - Select a contact group from the **Select Contact Group** menu, and then click **Add Contact Group**.
 - Import a contact group. Click **Choose File**, navigate to a `.csv` file containing the desired contacts, and then click **Import Contact Group**.
 - Search existing Cleo Stream application contacts. Click **Add by Last Name** to open the **Add Contact by Last Name** dialog box. Select one or more contacts and then click **Return to Message**.
 - Add a contact directly. Enter information for the contact and click **Add Contact**.

The contacts you add, whether individually or as part of a contact group, are displayed individually at the bottom of the **Contacts** page.

2. Optionally, click **Manage** to display the **Manage Contacts** window to remove contacts from the list.

3. Optionally, click **Export** to send a .csv format file to your browser download folder.
4. When you have finished specifying contact information, click **Continue to Options**.

The **New Message - Options** page appears.

5. Select general and distribution method-dependent options. See [Specify message options](#) on page 9.

Specify message options

Provide general and distribution method-specific information about your message.

In addition to the general message information, use this screen to specify more information for certain types of messages (audio, fax, etc.) If sending an SMS message that will require a response, make sure to read about [SMS opt-out keywords](#) before composing your message.

1. Specify message options.

- **From:** The message sender. This appears on emails and fax cover pages as **From Name**. The default value is the currently logged in User Name.
- **Confirmation Email:** The email that will receive reports. The default value is the email address of the currently logged in user.
- **Schedule Date** and **Schedule Time:** The date and time that the message will be sent.
- **Priority:** The priority of the message relative to other messages in the system.
- **Reference Code:** Enter a reference code to be associated with all destinations in this message. This code is for reporting purposes only and is not required.
- **Batch Number:** Enter a unique batch number to be associated with the message. This code is for reporting purposes only and is not required.

2. If necessary, specify audio options.

- **Number of Attempts:** Specify the number of attempts Cleo Stroom should make to reach a given contact.
- **Responses:** To prompt the recipient to reply to the message, use this menu to create or select an audio file to prompt a response. In this field, select an option for recipient responses.
 - **No Response Required:** Select this option if a response is unnecessary.
 - **Create Response Instructions From Text:** This option displays a text entry box. Enter text describing the response options to present to the recipient. Cleo Stroom will convert this text to audio and play it for the recipient after the body of the message. The responses created here should describe and correspond to the response digits and meanings configured below. For example, enter `Press one for yes; press two for no` and then configure your response digits and meanings accordingly.
 - **Audio File Name:** Select the name of a pre-recorded audio file stored by Cleo Stroom Notify. The audio file should describe and correspond to the response digits and meanings configured below.
- **Set Response Digit and Associated Meaning:** Use this section to associate a key pad input with a meaningful value related to your acknowledgment audio file.
 - **Number of Responses:** The number of possible responses.
 - **Response:** For each response, select a key and specify a value. When the recipient responds by pressing this key, the value of the response is saved as part of the message.

3. If necessary, specify fax options.

- **Cover Page:** Select a cover page from the menu.
- **Resolution:** Select a resolution from the menu.
- **Retry Scheme:** The number of times the system will re-attempt an unsuccessful fax before reporting a failure.

4. Click **Continue to Review**.

The **New Message - Review** page appears.

5. Review the information specified about your message and send it. See [Review and send message](#) on page 10.

Review and send message

Review information about your message.

On the **New Message - Review** page:

- If you are satisfied with your message, click **Send Message**. The message is sent.
- If you want to make changes, click **Go Back to Options**. The **Options** page appears. Make updates on the **Options** page, or click **Go Back** until you return to the page where updates are necessary, and repeat the message creation process from that point.

Using Express Launch

With Express Launch, you can create and send a message from a single page.

To begin the Express Launch, navigate to the **Messages** page and click the **New Message** link.

Use the **Express Launch** page to provide the information required by the Cleo Stream software to send your message. The information falls into the following sections on the page:

- [Message Header](#) on page 10
- [Message Content](#) on page 10
- [Recipients](#) on page 11
- [Message Format](#) on page 12

Message Header

Specify the basic information for the message.

- The **Name** field is automatically filled in with information determined by the Cleo Stream administrator, and is typically the user's name. Enter text to change this field if desired.
- The **Subject** field is used as the subject line for any email, fax, or text messaging recipients and also as the **Message Title** for reports. If you select a message template, the **Subject** field is automatically filled with the template name.
- By default, all messages are set as **Normal** priority. Selecting **High** priority will cause the message to interrupt and take precedence over any currently running messages that are set as **Normal** or **Low** priority.
- By default, the message is set to send **Now**, which sends immediately upon clicking **Submit**.
- Use the **Schedule** option to set the date and time that the message will be sent:
 - Use the **Schedule Date** field to specify a date in either of the following formats: MM/DD/YYYY or MM-DD-YYYY. Optionally, use the calendar icon to select a date.
 - Use the **Schedule Time** fields to select a time.

Message Content

Build the message body.

Enter the message text, either directly or by specifying a template. Identify and edit any responses desired and specify any attachments for the message.

Content

The **Content** field contains the main message. You can manually type the message or select **Select Template** and choose a pre-built message from the **Template** menu. The text from the **Content** field will appear as the body of the email, text message, pager message, or fax. The text is converted to voice for phone and cell calls.

- Select the **HTML** option to enter the content using an HTML editor, which allows you to add HTML formatting and images to your email message. The Cleo Stroom Notify software uses CKEditor. Visit http://docs.cksource.com/CKEditor_3.x/Users_Guide for information about how to use this editor.
 - 📄 **Note:** Copying and pasting images works in Mozilla Firefox, but not Internet Explorer. Users are encouraged to use either uploaded images or images with accessible links.
- Select **Plain** to display the **Content** field without HTML formatting.
- Select **Sync** to keep the content between **HTML** and **Plain** modes synchronized. **Sync** is selected by default. When this option is selected, you cannot edit the text in **Plain** mode. When **Sync** is cleared, you can edit the text in the **Content** field in **HTML** mode and **Plain** mode independently. This allows you to send only the plain text message for email clients and other destination types that do not display HTML.
- **Sync** is cleared by default when using a Template. This helps prevent unintentionally modifying each respective message area.
- To save your message as a template, select **Save as New Template**. A new **Template Name** field appears where you can enter a name for your template. The template is saved with the assigned name when the message is submitted. To edit or delete existing templates, navigate to **Messages > Templates**. You can also use the template manager located here to create templates. When selecting a template, either during the creation of a broadcast or to edit from the **Templates** page, the **Sync** option is never selected, since templates may contain different HTML and plain text content. When editing a template, you can select **Sync** to automatically copy all the HTML content to the plain text message. If you leave **Sync** cleared, you can edit each message independently.

Responses

Use the **Response** feature to configure a voice message to record a key response from the recipient. To use the **Response** feature, compose your response message to include instructions that prompt the recipient to press a key from up to ten possible key assignments. Use the **Responses** menu and choose **Add Response Message** to display the fields used to set the key assignments. Select the **Number of Responses** that match your message instructions and then assign the desired keys, 0-9, with the **Response** that will be recorded when the key is pressed by the recipient. The status report for the message will show a tally of the key responses received by all recipients for each assigned key.

If your message will prompt an SMS response, make sure to read about SMS *opt-out keywords* before composing your message.

Attach

The **Attachment** option allows you to search for and add attachments to the broadcast. Attachments are only applicable with email and fax messages. Click **Browse** to search for an attachment. When the attachment is selected, its path and filename appear in the **Attachment** field. Click **Add Attachment** to add the attachment to the broadcast. Repeat this process to find and add more attachments. All attachments added for the broadcast will be listed at the bottom of the **Express Launch** page where they can be viewed or removed prior to submitting the broadcast.

Recipients

Specify one or more recipients for the message.

There are three options for adding recipients to the message. Choose any or all of these options:

1. Enter a number or email address in the **Number/Email** field and click **Add**.

2. Select an entry from the **Contacts** list and click **Add**. Alternatively, double-click an entry from the **Contacts** list.
3. Choose a pre-defined list and double click or select **Add**.

Click **Show** to display details for a selected **Recipient** or **List**.

Click **Refresh** to update **Recipients** and **Lists** with any changes made by other users since you last logged in. The count preceding **Contact(s)** and **Group(s)** will reflect additions, deletions, or share level changes. Any changes made to contacts or groups are automatically updated to **Express Launch** and therefore do not require using **Refresh**.

Message Format

Specify which message format to use for each recipient.

This section shows all the contacts and groups added from the **Recipients** section. In the **Message Format** section, specify the format of the message for each recipient or list. If the default message format has been pre-set for the recipient or list, the message format will be selected accordingly. Once you have specified the message formats for your recipients, click **Apply**.

To **Remove** one or more recipients:

- Select individual destinations to remove them from the message.
- Select **Remove** in the title bar to remove all destinations from the message.
- Click **Apply** after removing the desired destinations.

Opt-out keywords in SMS messages

When creating an outbound SMS message that elicits a response, be aware that there are several keywords that some SMS providers will interpret as cancelling the service. As a result, if a recipient responds to your message with one of these keywords, outbound messages will no longer be sent to recipients unless they text back with a restart keyword. This will only occur if the user responds with any one of the keywords individually, with no other characters.

The opt-out keywords that will stop a user from receiving any outbound messages are:

- STOP
- STOPALL
- UNSUBSCRIBE
- CANCEL
- END
- QUIT

To restart the service, the user must reply with one of the following keywords:

- START
- YES
- UNSTOP

To avoid this issue, design outbound messages so that recipients will not need to reply with any of the opt-out keywords.

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About messages

Use the **Messages** page to review messages sent and received using Cleo Stream Notify software.

The **Messages** page is displayed upon logging into Cleo Stream Notify. The **Messages** page has four sub-pages:

- On the default **Status** page, view a searchable list of Cleo Stream messages.
- On the **New Message** page, create and send Cleo Stream messages.
- On the **Sent** page, view a list of outgoing messages that meet specified search criteria.
- On the **Received** page, view a list of incoming messages that meet specified search criteria.

Message status on the Status page

Use the **Status** page to view information about messages sent using Cleo Stream Notify.

The **Status** page displays a list of messages sent using Cleo Stream Notify. Information is displayed for each message in the following columns:

Column	Description
Job	Job number assigned to the message by Cleo Stream.
Status	The state of the message in terms of relative success of transmission.
Subject	The subject of the message as entered as part of the cover page.
Sent	Data and time the message was sent.
Recipients	How many recipients the message was sent to.
Response	Optional. Shows the aggregated counts of different responses when ShowResponseOnStatusPage is set to 1 in Master Config.
From	The name of the user who submitted the message to Cleo Stream for distribution.
Action	A list of links to initiate actions on the message.

Viewing sent messages

Use the **Messages > Sent** page to search for and view information about messages sent using the Cleo Stream Notify system.

The **Messages > Sent** page allows you to search sent messages for users, MFPs and save-to-folders defined for Cleo Stream Notify. The results displayed are restricted by the role assigned to the current user. See [About roles and permissions](#).

1. Specify search criteria. Select a **user**, **MFP**, or **save-to-folder** from one of their respective menus.

2. Optionally, select **Failed Jobs Only**.
This option applies a filter to the list after the search. It does not use job failure as part of the search criteria.
3. Click **View Messages**.
Cleo Stream displays a list of messages that match the specified criteria.
4. Optionally, expand or narrow the scope of your search by changing the number of days in the **Show messages for last** field.
5. Optionally, click the value in the **Subject** column of a message to see details about that message. See [About the Details window](#) on page 14.

About the Details window

The **Details** window is displayed upon clicking the subject of a message on the **Status**, **Sent**, or **Received** pages.

The **Details** window displays the following information about the selected message:

Field	Description
Job	Job number assigned by Cleo Stream to the message.
Submitted	Date and time the message was submitted to Cleo Stream for processing
Submitted by	The name of the user who submitted the message to Cleo Stream for distribution.
Scheduled to run	Date and time that Cleo Stream scheduled the message to be distributed.
Status	The state of the message in terms of relative success of transmission.
Recipients	The total number of recipient destinations the broadcast was sent to.
Total Pages	The total pages distributed.
Successful	The total number of destinations.
Completed	The total number of completed destinations.
Voicemail	The total number of calls answered by voicemail.
Hangup	The total number of calls where a hang up was detected.
Subject	The subject of the message as entered as part of the cover page.
Original Job	
Resend Jobs	
Message Text	Click to see the text sent in the message.
Message Audio	Click to hear audio used as the body of the message.
On-One Message Audio	Click to hear audio recorded for on-one message.
Pre-Message Audio	Click to hear audio played before the body of the message.
Post-Message Audio	Click to hear audio played after the body of the message.
HTML Text	Click to see the text sent in the message in HTML format.
Attachment(s)	Click to view the contents of attached files.

Field	Description
Responses	If the message included a survey, this section displays information about responses to survey questions.

Click **Details** to display the **Status Details** window. See [About the Status Details window](#) on page 15.

You can export details about the messages, selected contacts, or all contacts.

About the Status Details window

The **Status Details** window displays information about the message status displayed in the **Details** window.

The **Status Details** window displays message information in the following columns for each recipient:

Column	Description
Name	Name of the recipient.
Number/Address	Phone number, fax number, or email address of the recipient.
Type	Distribution method used to send the message to this recipient.
Result	Description of the outcome of the delivery process.
Response	Description of the acknowledgement key pressed during a voice call, or the SMS text response.
Attempts	The number of attempts Cleo Stroom made to deliver the message.
Time/Date	Date and time the message was delivered.
Duration (Minutes)	The duration of the message in minutes. Only applies to audio messages.

Viewing received messages

Use the **Messages > Received** page to search for and view information about messages sent to a Cleo Stroom Notify user.

This page allows you to search for messages received by any user, Xerox MFD, save-to-folder, printer, fax number or the default recipient defined for your Cleo Stroom Notify system.

By default, messages received in the last 30 days are shown.

1. Specify search criteria. Select a user, Xerox MFD, save-to-folder, printer, fax number, document management user, or default recipient from one of their respective menus.
2. Click **Get Faxes**.

Your Cleo Stroom system displays a list of messages that match the criteria specified. For each message, the list displays the status of the message, time the message was received, the user the message is from and the number of pages in the message. If the message was received as a TIF or PDF file, click **TIF** or **PDF** to view it. If the message was received on Xerox MFP, click **Print** to print the message on the MFP.

3. Optionally, specify how far back in the message history to search for messages and click **See Received Faxes for**.

Your Cleo Stream system redisplay the search results with the new time period applied.

4

About contacts and contact groups

Cleo Stroom Notify contacts are the recipients of your notifications. Organizing contacts into groups enables you to easily specify a large number of contacts as notification recipients at one time.

Use the **Contacts** page to view and edit contact information. Use the **Contact Groups** page to view and edit contact group information.

A contact contains the information needed by Cleo Stroom Notify to send notifications, including name, phone number, fax number, email address, and text messaging information. In addition, each contact can have a company and a department within the company.

Use the **First Name** and **Last Name** fields on the **Contacts** page to search the contacts list. Alternatively, click the **Advanced** link to display more fields to search.

A contact group is a ready-to-use list of recipients that you can select when creating a message. When a contact group is selected for a message, Cleo Stroom Notify adds each contact in the group as recipient for the message.

Adding a contact

Start the process of adding a contact from the main **Contacts** page.

1. On the **Contacts** page, click **Add Contact**.
The **Add Contact** page is displayed.
2. Enter information about the contact. Values are required for at least the **First Name** and **Last Name** fields.
For information about the fields on this screen, see [Contact information](#) on page 20.
3. Optionally, click **More information** to display additional fields to provide contact information.

Updating a contact

Begin the process of updating a contact from the main **Contacts** page.

1. On the **Contacts** page, click the name of the contact.
The **Update Contact** page is displayed.
2. Modify or add information about the contact as necessary.
For information about the fields on this screen, see [Contact information](#) on page 20.
3. Click **Update**.

Deleting a contact

Delete contacts from the main **Contacts** page.

If you delete a contact that belongs to a contact group, that contact group is updated accordingly.

1. On the **Contacts** page, select one or more contacts to delete.
Select all contacts by selecting the check box in the header row of the list of contacts.
2. Click **Delete**.
Cleo Stream Notify displays a message that the contacts were deleted successfully.

Adding a contact group

Add a contact group from the main **Contact Groups** page.

1. On the **Contact Groups** page, click **Add Contact Group**.
The **Add Contact Groups** page is displayed.
2. Enter a name and description for the group.
This name is used to identify the group throughout Cleo Stream Notify.
3. Select the list type:
 - **Static**: a fixed list comprised of recipients selected on this page.
 - **Dynamic**: a dynamically created and automatically updated list with all recipients matching the defined search criteria.
4. Select a value from the **Share Level** menu to specify which other Cleo Stream users have access to the list.
5. Select a value from the **Default Distribution** menu. Cleo Stream uses this value to automatically set a distribution method for the contacts in this group.
6. Select **Multi-function Printer** if you have Cleo Stream configured to work with Xerox MFPs and would like the list to be selectable on those devices.
7. Select **Public** if you would like the list to be selectable on the Recipient Update web page.
8. Search for contacts to add to the group.
 - a) Click **Plus** to add a line to your search criteria.
 - b) Select a field and an operator, and enter a value to search on.
 - c) Optionally, click **Plus** to add another line to your search criteria.
 - d) Click **Search**.
Cleo Stream displays a list of contacts that match your criteria.
9. Select one or more contacts to add to your group and click **Add to List**.
10. Click **Save**.

Updating a contact group

The process of updating a contact group begins on the main **Contact Groups** page.

1. On the **Contact Groups** page, click the name of the contact group to update.
The **Update Group** page is displayed.
2. Modify or add information about the group as necessary.

For information about the fields on this page, see [Contact information](#) on page 20.

3. Click **Save**.

Deleting a contact group

You can delete contact groups from the main **Contact Groups** page.

If you delete a contact that belongs to a contact group, that contact group is updated accordingly.

1. On the **Contact Groups** page, select one or more contact groups to delete.

You can select all contact groups by selecting the box in the header row of the list of contact groups.

2. Click **Delete**.

Cleo Stroom Notify displays a message that the contact groups were deleted successfully.

Importing a contact group

Import data from a `.csv` file to Cleo Stroom Notify as a contact group.

The import file must be a comma-delimited text file containing the names, fax numbers, and email addresses where messages will be sent. The first record (line) must be a header row containing one or more field names (refer to or use the [template](#)). Each recipient must have at least one contact method (phone, fax, email, etc.) and the **First Name** and **Last Name** fields are mandatory. Recipient data can then be entered in the proper column appropriate to the chosen headers.

1. On the **Contact Groups** page, click **Import**.

The **Contact Groups > Import** page is displayed.

2. Click **Choose File** and browse to the file to import.

3. In the **Duplicates** section, choose an option for handling duplicate contact information.

A contact from the import list is considered a duplicate when all of the following fields match: First name, Middle name, Last name, Title, Department, Company, Address1, Address2, City, State, ZIP.

- **Ignore:** Matched recipients from the import list are ignored and the existing matched recipients in Cleo Stroom remain unchanged. Unmatched (or new) recipients are added to Cleo Stroom.
- **Append Contact Info:** Only the blank fields of existing Cleo Stroom recipients are updated from the same fields that are now populated in the matching recipient from the import list. All fields that are already populated in the existing Cleo Stroom recipients are not updated, even if the content for those fields is different in the import list.
- **Overwrite Contact Info:** Matched Cleo Stroom recipients are overwritten with all fields from the matching recipients in the import list.

4. In the **List** section, choose one of the following options for creating a new list.

- **None:** This will add just the recipients and not associate them with any lists.
- **Create New List:** This will create a new group and add the contacts to that list. You must also provide the following information:
 - **List Name:** Enter a name for the group. This name will appear throughout Cleo Stroom Notify for this group.
 - **Description:** Enter a short description of the group.
 - **Type:** Static is the only available choice.

- **Shared:** Specify the Cleo Stream Notify users who can access this contact group. Choose from everyone, your company, your department or no one.
 - **Multi-function Printer:** Select this option to make these contacts available to multi-function printers.
 - **Public Contacts:** Select this option if you are using the recipient self-signup module and want this list to be available to those recipients.
 - **Add to Existing List:** Choose a list to which you want to add the imported contacts.
5. Click **Import**.
Cleo Stream Notify displays some statistics related to the import.

Exporting a contact group

Export the content of a contact group to a `.csv` file.

1. On the **Contact Groups** page, click **Export**.
The **Contact Groups > Export** page is displayed.
2. Click the **Export** link for the contact group to be exported.
Cleo Stream Notify downloads the `.csv` file.

Contact information

The following describes the fields available when adding or updating a contact.

Field Name	Description
First Name	Contact's name. First Name and Last Name required when creating a new contact.
Middle Name	
Last Name	
Title	Optional.
Department	Used to establish membership in a group within a Company. Also used to establish access rights to certain objects in your Cleo Stream system.
Company	Used to establish membership in a group within the overall list of contacts. Also used to establish access rights to certain objects in Cleo Stream.
Share Level	Determines with whom this contact can be shared.
User Owner	The name of the user who created the contact.
Contact Group	Allows you to specify which contact groups this contact belongs to.
Default Contact Group	A list of distribution methods from which you choose the default distribution method for the contact.
Work Phone	Must include area code.
Home Phone	Must include area code.

Field Name	Description
Cell Phone	Must include area code.
Fax	Must include area code.
Email	
Text Messaging:	
Recipient update	
User Name	User name associated with the Contact.
Password and Verify Password	Password associated with user name.
Address1	Location information for the Contact.
Address2	
City	
State	
Zip	
Country	
County	
Latitude	
Longitude	
Keywords	Optional
Comment	Optional

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About templates

Cleo Stream Notify templates comprise of several types of files used in Cleo Stream Notify messages.

Upon clicking **Templates**, a list of all the files used in Cleo Stream Notify messages is displayed.

Template types include message text files and audio recordings that act as a pre-recorded message body, and pre-message and post-message audio files.

In addition, use the **Templates** screen to access functionality that converts text entered into audio to use as a pre- or post-message, or a pre-recorded message. You can also save audio files as acknowledgments or survey questions.

Viewing the template list

View a list of all templates or a list of templates of a particular type.

Upon clicking **Templates**, a list of all template files is displayed.

Click any of the menu options in the left pane to display one of the following lists of a subset of templates:

- message text
- audio recordings
- pre-messages
- post-messages
- acknowledgments

For each template file in the list, you can:

- update the display text associated with it
- view or listen to it
- delete it.

About message text

Use message text files as the body of text-based messages, or for converting to `.wav` files for voice-based messages.

When HTML email is enabled in the Cleo Stream Notify Master Configuration, you can prepare your message text using Cleo Stream Notify's embedded HTML editor, CKEditor, which allows the addition of HTML formatting and images to your email message. See the [CKEditor User's Guide](#) for additional help using this editor, including the [related section](#) on how to insert and edit images. Note that while copying and pasting images does work in the Mozilla FireFox browser, users are encouraged to use either uploaded images or images with accessible links.

A **Plain text** message area and **Sync** option are also present when **HTML email** is enabled. For a new broadcast, **Sync** is selected by default and indicates that the text content of the message entered in the HTML message area will also be extracted and automatically copied to a **Plain text** message. The **Plain text** message is delivered as an

alternate stream in email for clients that do not display HTML, as the cover note for faxes, and is converted to voice for voice calls. The **Plain text** message can be viewed by selecting the **Plain** radio button.

When the **Sync** option is selected, the **Plain text** message cannot be edited. You can clear the **Sync** option and edit the **Plain text** content without affecting the content that was entered in the HTML message area. This option is useful to modify only the plain text message for email clients and other destination types that do not display HTML. The **Sync** option is cleared by default when using a **Template** to prevent unintentional modification of each respective message area.

Adding message text

Download a file or create a file to act as the body of your Cleo Stream Notify message.

1. Click **Add** on the **Templates > Message Text** page.
2. To add text, either:
 - Click **Choose File** to browse local files to upload to Cleo Stream.
 - Enter text in the **Message text** field.
3. In the **Display text** field, enter text to help identify the file in other parts of the Cleo Stream Notify UI.
4. Select a value for Company and Department.

This message text will only be available to users who are part of the company and department specified here.
5. Click **Save**.

By default, new message text files are marked as **Active** on the **Message Text** file list. See **Making Message Text files available**.

About audio recordings

Audio recordings are pre-recorded `.wav` files that you can use as the body of voice-based messages.

You can upload `.wav` files to Cleo Stream or use Cleo Stream to convert text to audio. Once the file is in Cleo Stream, mark them **active** to make them available for use in messages.

Making pre-recorded audio files available

Mark audio recordings as **active** to make them available for use in messages.

1. Go to the **Templates > Audio Recordings** page.
2. In the **Active** column, select each audio recording to be made available for use in messages.

Adding a pre-recorded audio recording

Download an audio file to be the body of your Cleo Stream message.

1. Click **Add** on the **Templates > Message Text** page.
2. Click **Choose File** to browse local files to upload to Cleo Stream.

Audio files must be in `.wav` format.
3. In the **Display text** field, enter text to identify the file in other parts of Cleo Stream.
4. Select a value for **Company** and **Department**.

This audio recording will only be available to users who are part of the company and department specified here.
5. Click **Save**.

Creating audio files from text

Create audio files (to be used as a pre-recorded message, a pre-message, a post-message, or an acknowledgement) from text provided to Cleo Stroom.

Select the file type, specify text to identify the file and enter text to be converted to audio.

1. Click **Convert to Audio**.
2. Select a file type. Choose from:
 - **Pre-message**: an audio file played prior to the main message in a broadcast.
 - **Post-message**: an audio file played after the main message in a broadcast.
 - **Acknowledgment**: an audio file played as part of a message that requires a response from the recipient. See [About acknowledgments](#) on page 25.
 - **Survey-Question**: an audio file used as part of a survey to prompt an answer.
3. In the **Display text** field, enter text to identify the file from among those displayed in the **Template** list.
4. In the **Message text** field, enter the text to be converted into audio.
5. Click **Save**.

The message text is converted to audio and the file is saved.

About Pre-Messages

A Pre-Message is a `.wav` file that is played before the main message in voice-based broadcasts.

There is one pre-message selected to play for all messages. Depending how your system is configured, either your Cleo Stroom administrator will specify your pre-message or you will. Select one file to be the pre-message for all outgoing messages. If your Cleo Stroom Administrator has configured Cleo Stroom to allow you to select a pre-message, you can do so from the **Templates > Pre-Messages** page.

About Post-Messages

A Post-Message is a `.wav` file that is played after the main message in voice-based broadcasts.

One post-message is selected to play for all messages. Depending how your system is configured, either your Cleo Stroom administrator will specify your post-message or you will. Select one file to be the post-message for all outgoing messages. If your Cleo Stroom Administrator has configured Cleo Stroom to allow you to select a post-message, you can do so from the **Templates > Post-Messages** page.

To select a post-message, go to the **Templates > Post-Messages** and select the option in the **Active** column for the desired audio file.

If you do not want a post-message, clear the selected message on the **Templates > Post-Messages** page.

About acknowledgments

An acknowledgment is a `.wav` file that you can use to let recipients know how to respond to an audio message.

You can create an acknowledgment by converting text to audio (see [Creating audio files from text](#) on page 25) or by importing an existing audio file.

Creating an acknowledgment by importing an audio file

Import an existing `.wav` file from your local system to create an acknowledgment.

1. On the **Acknowledgments** page, click **Add Acknowledgment** at the top right of the page.
2. Click **Choose File**, browse to the desired audio `.wav` file, and click **Open**.
Cleo Stream imports the audio file.
3. Enter a description in the **Display text** field.
4. Optionally, if you are logged in as an Admin, choose values for **Company** and **Department**.
If you are logged in as a User, the **Company** and **Department** are not available to you.
5. Click **Save**.

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About surveys

Use surveys to collect information from a list of contacts.

A Cleo Stream Notify survey is a collection of pre-recorded questions with pre-defined responses for the recipient to choose from. Surveys are distributed by phone (landline or cell). Recipients listen to the questions and respond using the keypad on their phones. The survey questions and responses are defined by you.

When you click the **Surveys** option at the top of the Cleo Stream page, a list of all files associated with surveys appears. From here, you can update or delete existing surveys, create new surveys and create or modify survey questions.

Creating a survey

A survey is a collection of pre-recorded questions with pre-defined responses for the recipient to choose from.

Create a survey using questions previously created. See [About questions](#).

1. Click **Surveys** at the top of the page, and then **Surveys** in the left pane.
2. Click **Add Survey** on the top right of the page.
3. Enter values for the **Name** and **Description** fields.
4. Select a **Company** and a **Department** from their respective drop-down menus.
5. Select a question from the **Question 1** drop-down menu.

Questions are pre-recorded audio files selected to be part of your survey. See [About questions](#).

6. Specify **Responses**.

Each of the number boxes represents a key on a phone keypad. The recipient uses the keypad to give the appropriate response.

7. Optionally, click **New** to add a new question to the survey. Select a question from the drop-down menu and specify responses.
8. When finished adding questions, click **Save**.

Creating questions

A survey question is a `.wav` file used for creating phone surveys. Survey recipients listen to a survey question and respond by pressing the appropriate key on their phone keypad.

Create survey questions by either importing an existing `.wav` audio file or entering text and using the optional Cleo Stream Notify **Text to Speech (TTS)** conversion feature to create an audio file.

After creating your survey questions, you are ready to create a survey. See [Creating a survey](#) on page 27.

Creating a question by importing an audio file

Import an existing `.wav` file from your local system to create a question.

1. On the **Questions** page, click **Add Question** at the top right of the page.
2. Click **Choose File**, browse to the desired audio `.wav` file, and click **Open**.
Cleo Stream imports the audio file.
3. Enter a description in the **Display text** field.
4. Optionally, if you are logged in as an Admin, choose values for **Company** and **Department**.
If you are logged in as a User, the **Company** and **Department** fields are not available to you.
5. Click **Save**.

Creating a question by converting text to audio

A question is created implicitly when converting text to audio.

1. On the **Surveys** or **Questions** page, click **Convert to Audio** on the left of the page.
2. Enter a description in the **Display text** field.
3. Enter the message you want to convert in **Message text** field.
4. Click **Save**.
When the conversion is complete, Cleo Stream displays a `Text converted successfully` message.