
BEFORE you start sending messages using AlertFirst, you need to:

[] **Set up your account settings**

- Manage your AlertFirst system defaults including phone call, email, text messaging and social media settings. All of this is done under Manage Account→My Account.
- Add additional account users (optional). Add any additional account users under Manage Account Manage→System Users. You can manage their system defaults under Account-wide Settings.

[] **Prepare your contact list**

- Gather your contact list. At minimum, your list must include the phone number, first name, last name, and group name. Up to 3 phone numbers can be included. The delimited format must be prepared as follows: Phone 1, First Name, Last Name, Phone 2, Phone 3, Dept/Team/Group, Email 1. If you don't have data for all the fields, they can be left blank, but, the blank fields **MUST** be included in the file you upload.

If desired, an Excel template can be downloaded from the Resources

- Save file in Excel or CSV format.

[] **Upload your contact list to AlertFirst**

If you need additional help, download the Upload Contacts Quick Start Sheet from the Resources page.

[] **Manage your contact groups or queries**

- Create, edit and delete your contact groups or queries. Groups are fixed groupings of contacts from your database. Contacts can be members of any number of groups, and the contact's group membership does not change unless they are removed from your database. Queries are dynamic groupings of contacts based upon selection criteria set by you. The members of a query automatically change as a contact's data changes such as their department name. All of this can be done under Contacts→Manage Contact Groups, or Contacts→Manage Contact Queries.

[] **Promote your opt-in keyword and maintain compliance**

- It is your responsibility to be sure your contacts have given you permission to send them text messages. Instruct your contacts to send a text message to 95643 with the opt-in keyword you created upon sign up to AlertFirst. You can find your opt-in keyword on the Home Page and on the Manage Account Page.
- To spread awareness for your text notifications, you can promote your opt-in keyword and our short code online. However, it is important that you maintain legal compliance when doing so. Visit <http://blog.alertfirst.com/terms-and-conditions/> for a mock-up of what your site must include to maintain compliance. Please note that all verbiage and formatting **MUST** be preserved.

[] **Purchase additional credits**

- There are three ways to purchase credits in AlertFirst: (1) click the Buy More Credits link on the Manage Account page, (2) click the Buy More Credits on the service bar at the bottom of every page, or (3) click the Buy More Credits button while creating a message.

NOW YOU ARE READY to go ahead and send messages!

For additional information, review the tutorial videos and Quick Start Sheets found on the Resources page.