

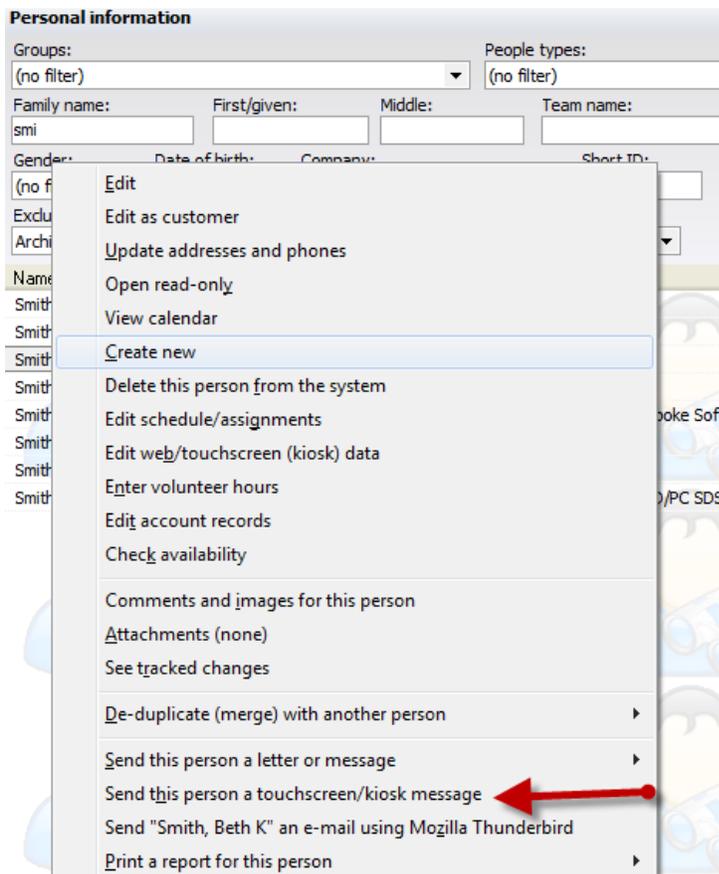
Touchscreen/kiosk Webinar Notes

Spring 2012

Sending a quick message to one volunteer

If you just need to send a quick message to a single volunteer, the easiest place to do that is from the person lookup screen.

Search for the individual, then right-click on their name in the listing. Select **Send this person a touchscreen/kiosk message**. Enter your message in the editor and then click **Save**.

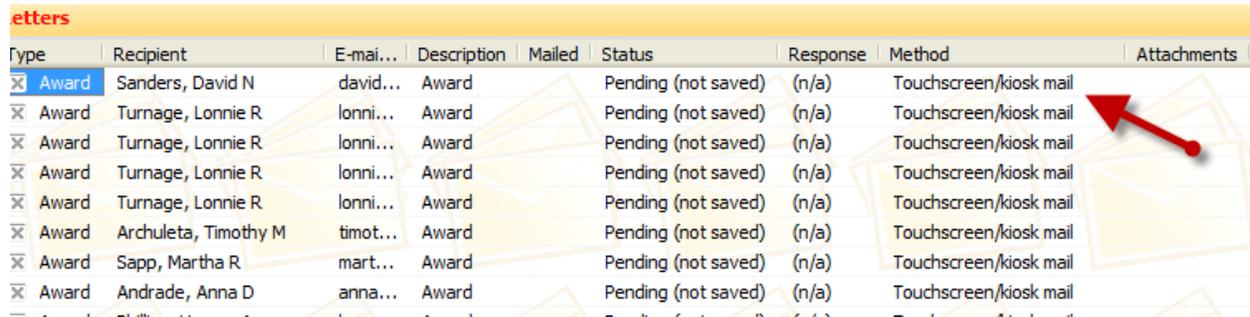


Sending a kiosk message to a lot of volunteers

To send a message to a lot of volunteers, your best method is to treat it like a mail merge that you would do to send via e-mail or postal mail, just make the delivery method touchscreen/kiosk.

First compose your message as a letter template (**Letters, mail merges and mailing labels** panel -> **Letter templates**). Then do your mail merge to the letter's recipients ((**Letters, mail merges and mailing labels** panel -> **Mail merge to letters and e-mails.**)

When the merge results come up, make sure the delivery method ("Method" on the grid) is set to Touchscreen/Kiosk mail.



Type	Recipient	E-mai...	Description	Mailed	Status	Response	Method	Attachments
✕ Award	Sanders, David N	david...	Award		Pending (not saved)	(n/a)	Touchscreen/kiosk mail	
✕ Award	Turnage, Lonnie R	lonni...	Award		Pending (not saved)	(n/a)	Touchscreen/kiosk mail	
✕ Award	Turnage, Lonnie R	lonni...	Award		Pending (not saved)	(n/a)	Touchscreen/kiosk mail	
✕ Award	Turnage, Lonnie R	lonni...	Award		Pending (not saved)	(n/a)	Touchscreen/kiosk mail	
✕ Award	Turnage, Lonnie R	lonni...	Award		Pending (not saved)	(n/a)	Touchscreen/kiosk mail	
✕ Award	Archuleta, Timothy M	timot...	Award		Pending (not saved)	(n/a)	Touchscreen/kiosk mail	
✕ Award	Sapp, Martha R	mart...	Award		Pending (not saved)	(n/a)	Touchscreen/kiosk mail	
✕ Award	Andrade, Anna D	anna...	Award		Pending (not saved)	(n/a)	Touchscreen/kiosk mail	

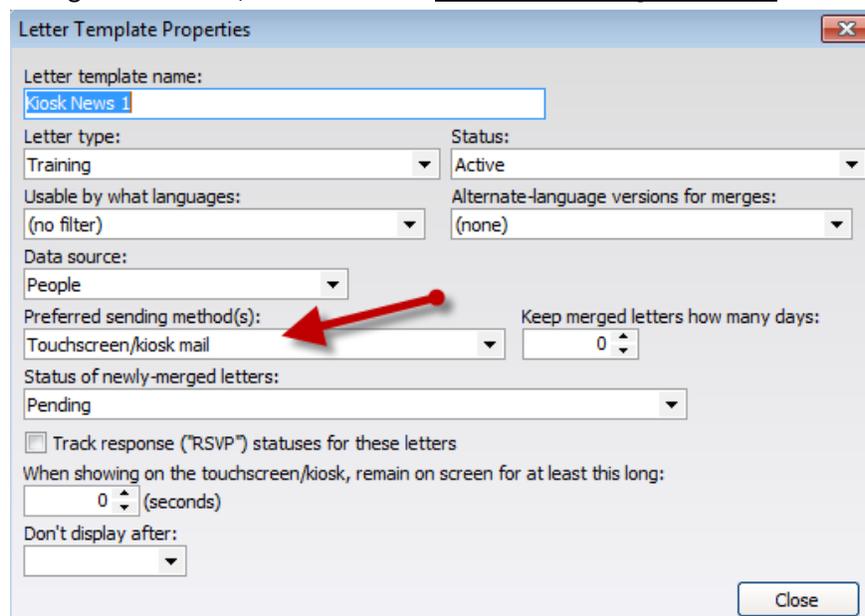
To do this:

Right-click, Select ->All

Then,

Right-click, Selected Letters -> Change method -> Touchscreen/Kiosk mail

You can also change the method in the Letter Properties of the template. If you prefer to make the change at this level, make sure the Preferred sending method(s) is set to **Touchscreen/kiosk mail**.



Letter Template Properties

Letter template name:

Letter type: Training Status: Active

Usable by what languages: (no filter) Alternate-language versions for merges: (none)

Data source: People

Preferred sending method(s): Touchscreen/kiosk mail Keep merged letters how many days: 0

Status of newly-merged letters: Pending

Track response ("RSVP") statuses for these letters

When showing on the touchscreen/kiosk, remain on screen for at least this long: 0 (seconds)

Don't display after:

Close

Sending Holiday (automated) Messages – birthday, anniversary, holidays.

VSys can be configured to automatically send messages via the kiosk on holidays, birthdays and service anniversaries. The holiday dates are in VSys as part of the Holiday Setup (**Setup** panel -> **Holidays**) while the birthday and anniversaries are sent based on data in the volunteer's record.

First you will need to have an appropriate message composed to send in your Letter Templates. I usually copy the **Kiosk Birthday Greetings** template since that has the appropriate settings and revise it for the holiday I want to celebrate. (**Letters, mailing merges and mailing labels** panel -> **Letter templates**, then right-click on the template and **Copy**)

Then in the **Touchscreen/kiosk** panel, select **Setup** then **Holiday Greeting Rules**. Right-click or select **Add holiday greeting rule** to configure when the message should be sent.

Setting up news items on the Kiosk

Two types of news items can be set up to cycle through the touchscreen/kiosk – news items (with text) and news images (picture only, version3 kiosk). It is the same editor you use for mail merges so it should look very familiar.

Set up either of these types of news items from the **Touchscreen/kiosk** panel -> **Setup**-> **News**. Select the type of message on the left margin and compose your message. Pictures can also be copy/pasted into news items with the text.

Setting up surveys on the Kiosk

There are two steps to setting up a survey for the touchscreen/kiosk.

First you need to define the parameters of the survey, then add in the specific questions and answer options.

Start from the **Touchscreen/kiosk** panel -> **Setup** -> **Surveys**. Click **Add a Survey** to begin. This screen shows the parameters for the survey. When the survey will be shown, the general message about the survey and whether the answers are linked to the volunteer or anonymous. Use the Eligibility section to filter who will see the survey.

Click the **Add question link** or right-click in the Question pane at the bottom to add questions. Enter the Question in the top field, determine if the person can have multiple answers or only one answer, then click the **Add answer** link to add each choice that will be presented to the viewer.

Letting volunteers print from the kiosk

You may want to let some of your volunteers print reports of their hours directly from the kiosk. To configure this option go **Touchscreen/kiosk** panel ->**Setup** -> **Touchscreen/kiosk setup**, then the panel for Reports. Use the **(add another report)** link to enable a report for printing from the kiosk and then use the **(edit)** link to filter who can print this report and to select where the report should print.