

Broadcasts

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Broadcasts are the simplest way to schedule one-time or recurring messages to your contacts. Creating a broadcast is a matter of defining the sending schedule, the recipients, and the content to send. Below each section of the page is described in greater detail.

Active

At the top of the page you can choose whether your broadcast is active or not. Activating / deactivating it here or on the broadcast list page has the same effect.

Scheduling

First, choose a **Schedule Name** so that you can pick this broadcast out in the broadcast list in case you need to make changes to it later. Next, choose a schedule frequency next to the **Send** label. The different frequencies and their options are described below.

Immediately

Immediate schedules will send the content one time to the recipients and stop. These types of broadcasts can't be modified later because of their one-time nature and must always be created as Active.

Daily

Choosing a daily schedule allows you to send the content one or more days at specific times. Below are the options for configuring a daily schedule:

Option	Description
<i>At</i>	Specific time: Choose the time of day to send the content Random time: Choose a window of time which starts at the given time and lasts for the number of specified minutes. The content will be sent at a random time within this window. Note: times will be interpreted in the project's time zone unless the recipient overrides it with a contact-specific time zone. The time zone used for group and organization recipients is always the project time zone, regardless of any contact-specific time zones.
<i>Start</i>	Choose a start date.
<i>Repeat</i>	no: Send for 1 day only every day: Repeat every day every ... days: Specify how often to repeat sending the content
<i>Stop</i>	after: Stop after this many occurrences never: Never stop

Some examples of setting up different daily schedules:

Send one time on 2018-04-15 at 12:00pm

Send*

At

Start

Repeat

Date of final occurrence: 2018-04-15

Send every day at 9:00am

Send*

At

Start

Repeat

Stop

For the month of April 2018, send every other day at a random time between 12:00pm and 1:00pm

Send*

At

Random Window Length (minutes)

Start

Repeat **days**

Stop **occurrences**

Date of final occurrence: 2018-04-29

Weekly

Many of the options for the weekly schedule are the same as the daily scheduling options, only that now you must select the days of the week on which to send.

The following options have new meanings:

Option	Description
<i>Repeat</i>	no: Send for 1 week only every week: Repeat every week every ... weeks: Specify how often to repeat sending the content
<i>Stop</i>	after: Stop after this many weekly occurrences. A weekly occurrence is one full iteration of sending for the entire week. never: Never stop

Some examples of setting up different weekly schedules:

Send every Monday, Wednesday, and Friday at 12:00pm for the first 4 weeks of April 2018:

Send*

On

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

At

Start

Repeat

Stop **weekly occurrences**

Date of final occurrence: 2018-04-27

Send on Tuesdays and Thursdays at 12:00pm for the first week of April 2018 and the third week of April 2018

Send* Weekly ▾

On

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

At A specific time ▾ 12:00 🕒

Start 2018-04-01

Repeat every ▾ 2 **weeks**

Stop after ▾ 2 **weekly occurrences**

Date of final occurrence: 2018-04-19

Monthly

Many of the options for the monthly schedule are the same as the daily scheduling options, only that now you must select the days of the month on which to send. In addition to choosing a specific day of the month, you can choose the last day of the month, the second to last day of the month, or the third to last day of the month.

The following options also have new meanings:

Option	Description
<i>Repeat</i>	no: Send for 1 month only every month: Repeat every month every ... months: Specify how often to repeat sending the content
<i>Stop</i>	after: Stop after this many monthly occurrences. A monthly occurrence is one full iteration of sending for the entire month. never: Never stop

Some examples of setting up different monthly schedules:

Send on the 15th of every month at 9:00am

Send* Monthly ▼

On Days

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

last - 2 last - 1 last

At A specific time ▼ 9:00 ⌚

Start 2018-01-01

Repeat every month ▼

Stop never ▼

For 2018, send every quarter on the first of the quarter, at 9:00am

Send* Monthly ▼

On Days

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

last - 2 last - 1 last

At A specific time ▼ 9:00 ⌚

Start 2018-01-01

Repeat every ▼ 3 months

Stop after ▼ 4 monthly occurrences

Date of final occurrence: 2018-10-01

Send annually on the first of January, at 9:00am

Send*

On Days 1 2 3 4 5 6 7
 8 9 10 11 12 13 14
 15 16 17 18 19 20 21
 22 23 24 25 26 27 28
 last - 2 last - 1 last

At

Start

Repeat months

Stop

Custom

If your use case is more complex than the default scheduling options, you also have the option of sending a Custom Daily Schedule. See [Custom Schedules](#) for more information.

Recipients

When choosing recipient(s) for the broadcast, first choose the recipient type(s). After choosing a type you can choose recipient(s) of that type. Below each recipient type is described in greater detail.

Users

This recipient type allows you to select Mobile Worker(s) to be the recipients of the broadcast.

User Groups

This recipient type allows you to select Mobile Worker Group(s) to be the recipients of the broadcast. All mobile workers assigned to the group(s) you specify will be recipients.

User Organizations

This recipient type allows you to select Organizations and send to all Mobile Workers and Web Users assigned to those Organizations **as their primary organization assignment**. This recipient type **does not** send to Cases.

With this recipient type, you also have some additional options. You can send to all Organizations which are descendants of the selected Organizations by selecting the "Also send to users at organizations below the selected ones" option. Further, with that option enabled, you can also choose to only send to specific Organization Levels that are below the selected Organizations. Below are three examples which demonstrate the different options. For the purposes of the example, imagine an Organization hierarchy with 3 levels: Country, State, and City.

Send only to users assigned to Organization USA and no users below that Organization

Recipient(s) Users User Groups **User Organizations** Case Groups

User Organization Recipient(s)

Also send to users at organizations below the selected ones

Send to all users assigned to Organization USA as well as all users assigned to all State and City Organizations below it

Recipient(s) Users User Groups **User Organizations** Case Groups

User Organization Recipient(s)

Also send to users at organizations below the selected ones

For the selected organizations, include

Send to all users assigned to City Organizations below Organization USA, but do not send to users assigned to the USA Organization or any State Organizations below it

Recipient(s) Users User Groups **User Organizations** Case Groups

User Organization Recipient(s)

Also send to users at organizations below the selected ones

For the selected organizations, include

Case Groups

This recipient type allows you to send to Case Groups, a type of grouping of cases that only applies to Messaging use cases. Case Groups are defined on the Messaging > Case Groups page.

Note: Support for Case Groups as recipients might not be available forever. Consider using a [Conditional Alert](#) to reach Case contacts, which is a more efficient way of expressing that use case.

Content

In this section you choose what will be sent to the recipient(s) when the schedule's events come due.

SMS

When sending SMS, type the message to send to the recipient(s).

You may also choose to specify translations for the message by checking the "Translate this message" box, in which case the translation to send will be chosen based on each recipient's preferred language. The languages available for use with messaging for your project are defined on the Messaging > Languages page. If the recipient's preferred language does not appear in the list of translations, then the translation associated with Default Language specified in the Advanced section will be used.

Email

When sending Email, type the subject and message of the email to send to the recipient(s). See the SMS section above for more information about specifying message content.

SMS Survey

If your project has access to Inbound SMS, then you will see an option which allows sending SMS Surveys to your recipient(s). An SMS Survey is a Form (defined in the App Builder) which gets filled out over SMS by your recipient(s). At the scheduled time, the SMS Survey session will start and the first question in the Form will be sent to the recipient(s), allowing them to answer the Form one question at a time. Upon completing the survey, the Form will be submitted and any case actions will be applied, just as if the form were submitted over Web Apps or through CommCare Mobile. The following additional options apply when sending SMS Surveys:

Option	Description
<i>Form</i>	The Form (configured in the App Builder) to use for the survey
<i>Expire After</i>	The survey session will remain open for this many hours. After the session expires, answers will no longer be accepted for any of the survey's questions.
<i>Reminder Intervals</i>	<p>If enabled, reminder intervals help remind the recipient that a survey is open if they have not yet completed it. Reminder intervals are specified as comma-separated numbers of minutes to wait. For example, specifying reminder intervals of "60, 60" would mean "send one reminder 60 minutes after the session starts, and send another reminder 60 minutes after the first reminder".</p> <p>At each reminder interval, for each recipient's survey session, if the survey session is still open the system will resend the last question asked to that recipient. If the survey session is closed, nothing happens.</p>

Advanced Survey Options

When sending SMS Surveys, these two advanced options are available:

Option	Description
<i>When the survey session expires, submit a partially completed form if the survey is not completed</i>	<p>If this option is enabled, when the session expires, the form tied to the session will be submitted in its current state, ignoring any unanswered questions. This can be helpful to collect survey answers as form submissions even for surveys that are not completed in their entirety. Without this option, only surveys which are completed in their entirety will create a form submission.</p> <p>Partial form submissions are marked in form exports with the <code>partial_submission</code> property set to <code>True</code>.</p>
<i>Include case updates in partially completed submissions</i>	<p>This option only applies when the above option is enabled.</p> <p>By default, when the above option is enabled and the system submits a partially completed form, it will not perform any actions which update or close cases since many questions could be missing answers. If you wish to still perform all case updates, then enable this option as well.</p>

Advanced

The following advanced options are available:

Option	Description
<i>Default Language</i>	<p>If you specify translations for your messages and one of your recipients' preferred languages is not in the list of translated messages you provide, the translation associated with the Default Language will be used when sending the message to that recipient.</p> <p>If "Project Default" is chosen, then the translation associated with the project's default messaging language defined on the Messaging > Languages page will be used.</p>
<i>Filter user recipients</i>	Using this option, you can choose to filter the recipients using custom user data. For all recipients who are not mobile workers or web users, this option will have no effect. For all recipients who are mobile workers or web users, only recipients who have the given value for the given custom user data property will be sent the content.