Everbridge 360™ User Guide

Everbridge Suite

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What is Everbridge 360™?

Everbridge 360™ is your one platform for enterprise resilience for all organizational roles. It is designed to allow effortless experience across all Everbridge product lines. In building an effortless experience, we can ensure:

- **Faster**, more **accurate** responses to **external** and **internal** threats.
- **Managing** what is important – your **People** and **Assets**.
- **Resilience** = **Proactive**, not reactive.
- Enterprise-class **reliability** and **scale**.
- **Open Extensible** Platform.

Everbridge 360™ includes the following features:

- Combined collapsible left-side **Apps Menu** to allow for seamless navigation across all applications and modules.
- New **Event Types** with predetermined event categories based on risk intelligence feeds with the ability to create custom event types to link together events, alerts, and templates, decreasing the mean time to communicate.
- New **Communications Workflow**, combining the best of both worlds between the preexisting Notification and Incidents functionality with new feature enhancements to optimize the launch process, reduce training time, reduce the opportunity for errors, and help mitigate the "fear of sending out."
- Enhancements for the Communications Workflow, including:
  - Event-driven communications.
  - Title of a Communication differentiated from message subject line.
  - Ad-hoc Communication based on the Organization's default settings.
  - Preview templates before using them.
  - Ability to customize attachments and contacts for each Communication.
  - Ability to add/exclude/remove recipients for each Communication.

Enabling Everbridge 360

For a Manager Portal user to utilize the Everbridge 360 interface and features, it must first be enabled in two places:

1. Administrators must enable it at the Organization level.
   - The **Communications** module can also be enabled here.
2. Users can then apply it to their profiles from the personal User level.

Enabling Everbridge 360 at the Organization Level

Administrators can use the **Everbridge 360** toggle to enable Everbridge 360 for their entire Organization. To do this:

1. Navigate to **Organization Settings** > **Everbridge 360** > **Default Settings**.
2. Click the **Everbridge 360** toggle to enable it.
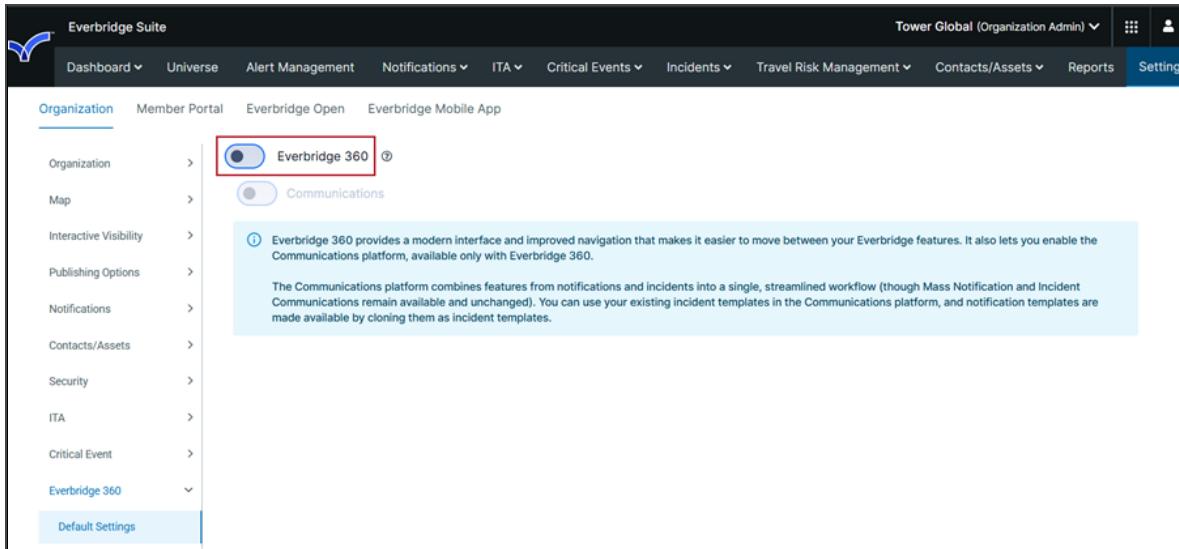
The page will reload with the Everbridge 360 interface applied.
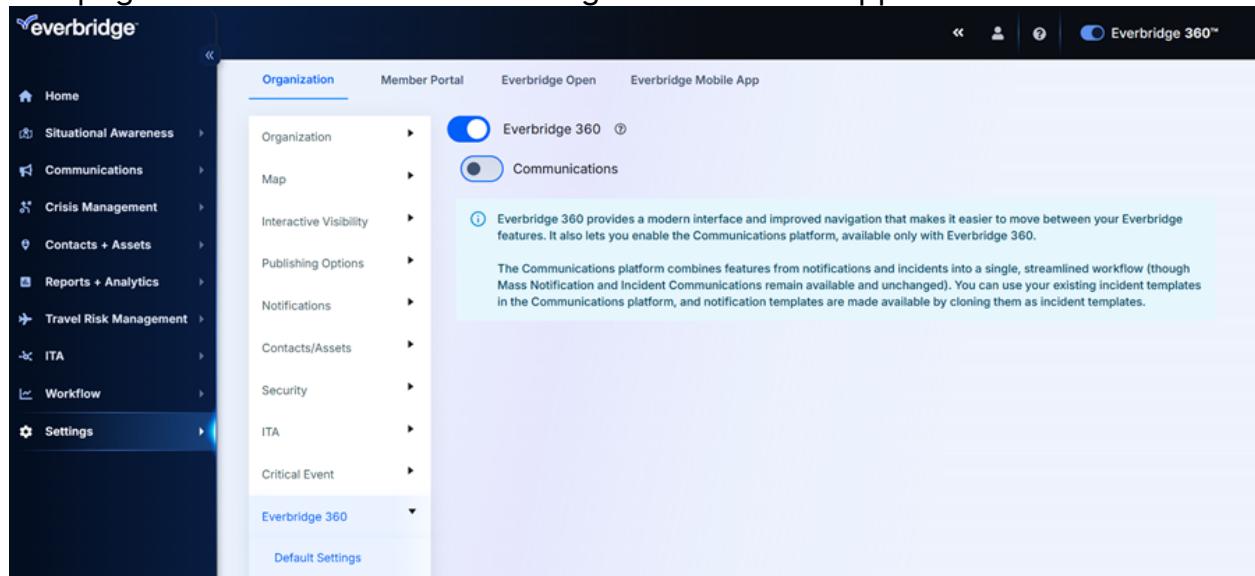
Communications Toggle

The **Communications** toggle allows Organization Administrators to control access to the enhanced Communications module. This toggle allows Organizations to adopt the next-generation Communications platform at their own pace while

maintaining full access to existing Mass Notification and Incident Communications functionality.

NOTE: The Everbridge 360 toggle above must be enabled in order to turn on Communications.

When the **Communications** toggle is **ON:**
- The enhanced **Communications** module appears in the left-side navigation menu.
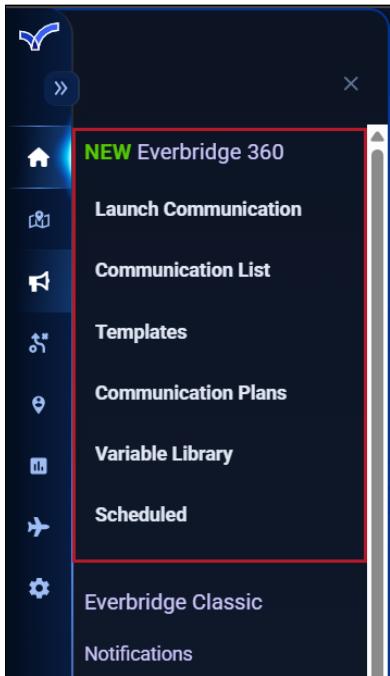
- Users can create, launch, and manage Communications using the unified platform.
- Access to advanced template management, real-time monitoring, and enhanced workflow features.

- Existing Mass Notification and Incident Communications remain available for comparison and transition support.

When the **Communications** toggle is **OFF**:
- The Communications module is hidden from the navigation menu and Everbridge 360 user interface.
- Users continue to access Mass Notification and Incident Communications through the Classic modules.
- All existing functionality remains unchanged and fully operational.
- Previously created Communications module data is preserved but not visible.
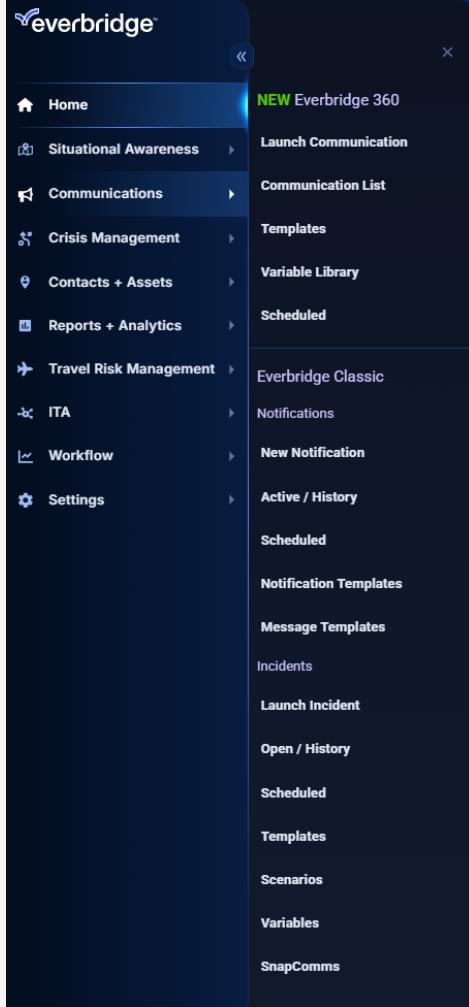
Applying the Interface at the User Level

Once enabled for an Organization by its Administrator, each user will have a new toggle to apply the Everbridge 360 interface while simultaneously retaining access to existing modules like Notifications and Incidents. If they'd rather continue to use the Everbridge Classic interface, they're welcome to turn the toggle **OFF** to revert to the original styling.
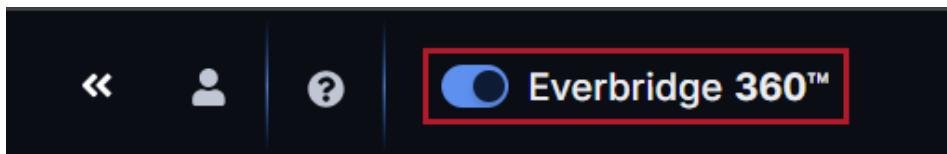
Navigation Menu

The new left-side navigation menu is the gateway to Everbridge 360™. It combines all the products you know and love but in an easier-to-navigate menu in a combined platform experience, exposing those areas that you need the most to the surface.

Menu Items	Collapsed View	Expanded View
- Home - Situational Awareness - Universe - Visual Command Center - Communications - Notifications - Incidents - Communications - SnapComms - Crisis Management - Launch Critical Event - Events - Submissions - Reports - Critical Event Templates - Task List Templates - Document Library - Widget Library - Form Library - Audit Log - Contacts + Assets - Contacts - Assets		

Menu Items	Collapsed View	Expanded View
• Reports + Analytics ○ Reports ○ Analytics • Travel Risk Management ○ Travel Risk Intelligence ○ Traveler Alerts ○ Booking Alerts ○ Country Risk Traveler Report ○ Arrival and Departure Report ○ Travel Report Scheduling ○ Custom Travel Reports • ITA ○ Open Incidents ○ Trends ○ Operations • Workflow ○ CEM Orchestration ○ Flow Designer • Travel Risk Management • ITA • Settings ○ Organization ○ Member Portal ○ Everbridge Open ○ Everbridge Mobile App		

Menu Items	Collapsed View	Expanded View
○ Access		

Communications Workflow

When responding to a situation, you need to choose the action that represents the best way to handle the situation. For example, a hurricane is approaching one of your main warehouses and a watch has been called. The storm has already reached Category 2, and 20 employees and contractors work in the warehouse.

With **Communications**, you can use quick, template-based, automated messaging or ad-hoc messaging for responding to events within a company, organization, or government office. In the example above, you can launch a Communication to inform your contacts that they should go to a place of safety.

Alternatively, you may have a situation that does not immediately have a high impact but has the potential to develop a higher severity. For example, a tropical storm is approaching your offices in Australia. It is projected to make landfall within the next three to four days. In this case, you may want to inform your contacts, but no immediate action is required.

Launching a Communication from Everbridge 360™

From **Communications** in the Left Menu, click **Launch Communication**. The **Launch Communication** page is displayed.

Communications Title and Description

Everbridge will automatically suggest a title for your Communication based on the Event Type chosen in Step 1. Click the pencil icon to edit the title.
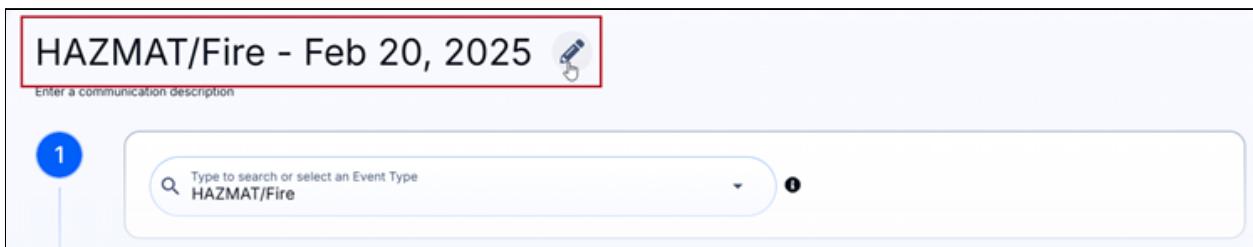
If desired, click **Enter a communication description** to add a description for your Communication.
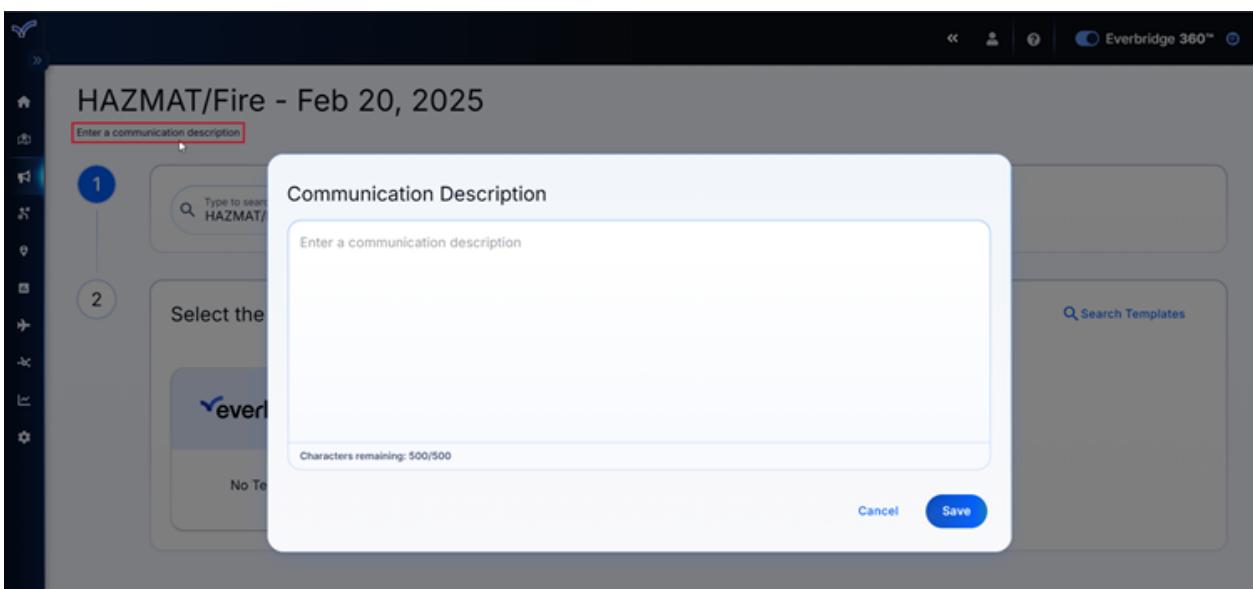
Once a Communication is sent, the title becomes the Communication Name on the **Communications History** page. It will also become the Incident Name on the **Incidents** > **Open/History** page.

NOTE: The name of the message can contain up to 255 characters. **Communication Description** is an optional field intended for future functionality, which will contain up to 500 characters.

Communications Toolbar

The **Communications Toolbar** can be found at the bottom of the **Launch Communication** page and moves with it as you scroll, allowing its menu items to be accessed at any time.
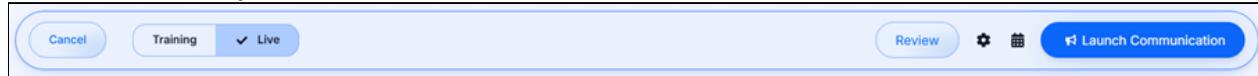
Training Mode

Training Mode allows users to practice composing and launching Communications without sending them to real contacts. They'll be identified in the **Communications History** with a textbook icon.
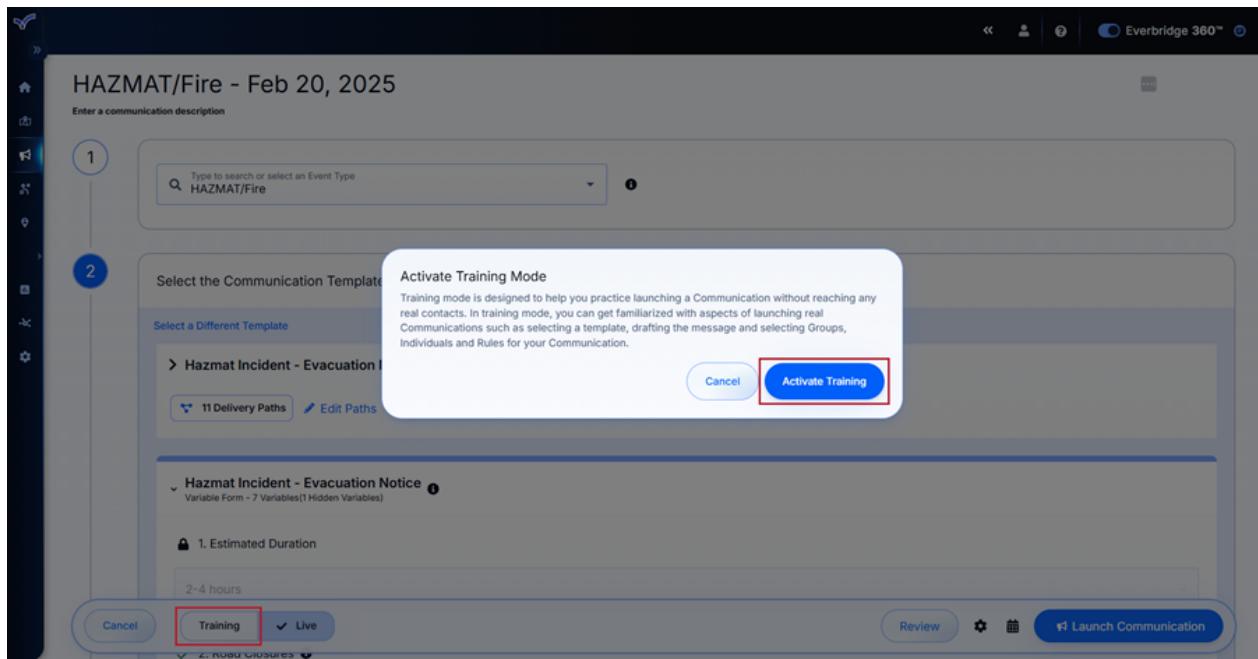
Schedule Communication

Click **Schedule Communication** to create a Communication that will be sent out at a specified time and date at various recurring intervals. See Scheduling Communications for more details.

Step 1: Event Type

Choose an **Event Type** from the dropdown menu that best matches the Communication being sent. This selection will determine which Communication templates are recommended in the next step and will automatically set a Communication name if one hasn't already been added. See Event Types for more details.
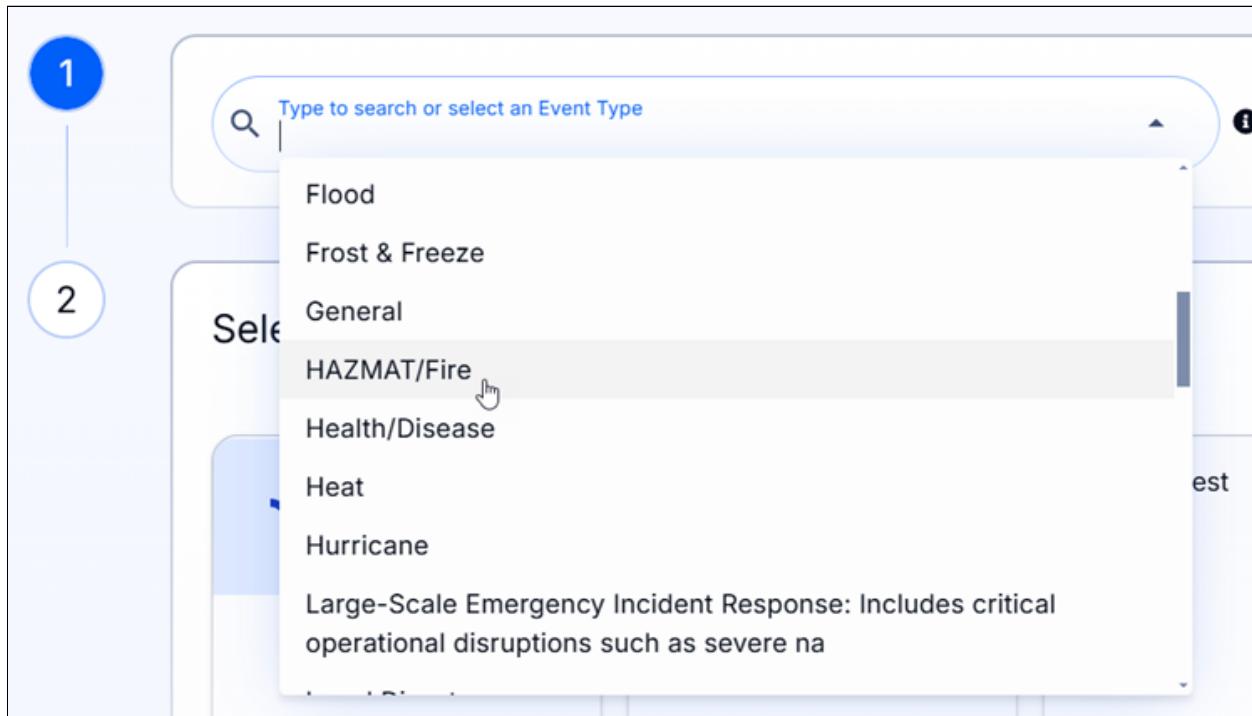
Step 2: Communication Templates and Delivery Paths

Everbridge 360™ automatically pulls from existing Communications templates, as well as legacy Notification and Incident templates.

Communication and Notification Template Considerations

Please see the following tied to Notification templates:

- When Everbridge 360™ is enabled for an Organization, all Notification Templates will be automatically duplicated/cloned as an Incident Template.
- The cloned Template will include the latest modifications to the Notification Template.
- The cloned Template will be deleted if the associated Notification Template is deleted.
- Naming convention for the cloned Template - <Name of Notification Template>_<Template ID>.

- Notification Templates that have the same Category name as the Incident Template Category name will be merged under the same Category when viewed under Communications.
- Notification Templates that have a different Category name will be listed under the respective Category when viewed under Communications.
- Organization Administrators and Incident Administrators will have no access to view the cloned Templates on the Incident Templates list page, thereby preventing any modifications to these Templates.

Choosing a Template

Once an Event Type has been selected, any templates assigned to the chosen Event Type will be suggested for use. For ease of use, each suggested template tile displays:

- Template title
- Event Type(s) assigned to the template
- Last used date
- Template category
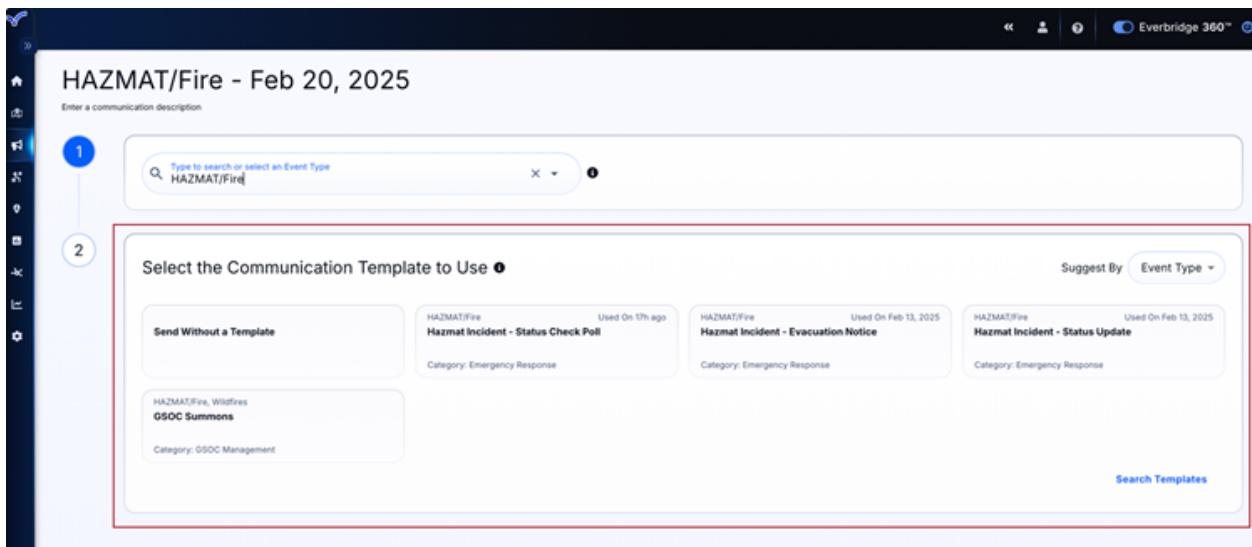
Click a suggested template to apply it and prefill the following information:

- Predefined message content
- Template Delivery Paths
- Variables
- Recipients

If the Event Type-specific template suggestions aren't appropriate for this

Communication, click the **Suggest By** dropdown to instead filter suggestions by Most Recently Used or Most Recently Updated.

- NOTE: If no Event Type is selected for Step 1, then the suggested templates will be filtered by Most Recently Used by default.
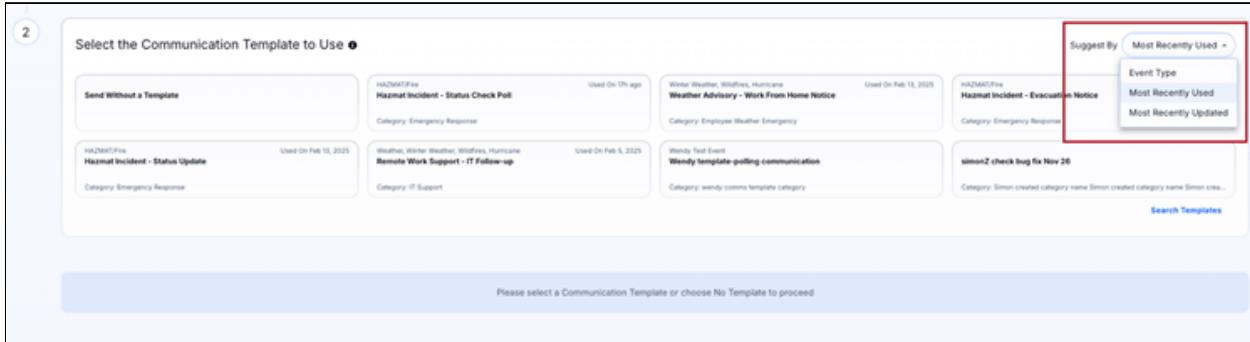
Searching Templates

If none of the suggested templates match the Communication's needs, click **Search Templates** to locate a different one.
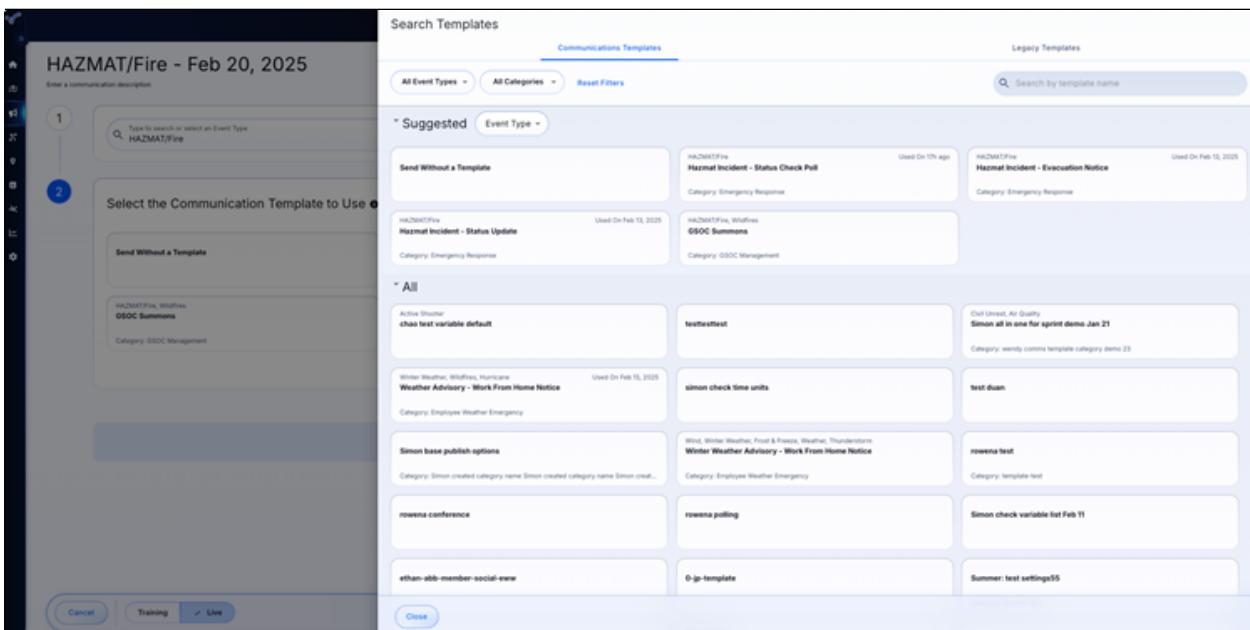

There are a few things to keep in mind when searching for templates:

- **Search Template** will display all templates that the user has access to.
- Templates can be searched within a selected Category, Event Type, or from **All**.
- The **Suggested** section can be filtered by Event Type, Most Recently Used, or Most Recently Updated.
- Users can click **Legacy Templates** above the search bar to browse Legacy Incident Communications and Mass Notification templates.

View or Change Applied Template

Once a template has been applied, clicking the title of the selected template will expose its details, including Category, Created By, Updated On, and Last Used.

Users can choose to replace the template as needed by clicking **Select a Different Template.**
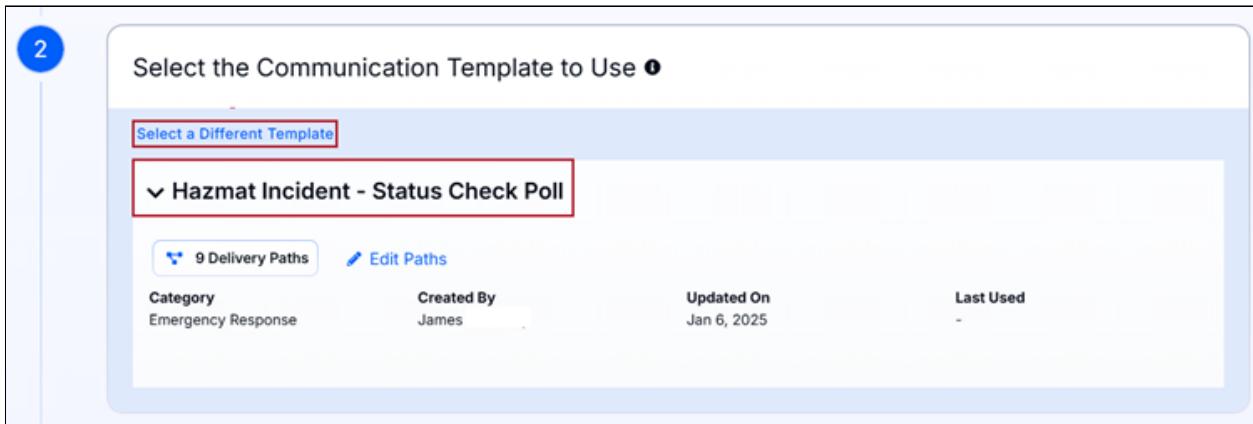
Message Paths

Once a template has been selected, click **Edit Paths** to adjust the message's Delivery and Publishing Paths.
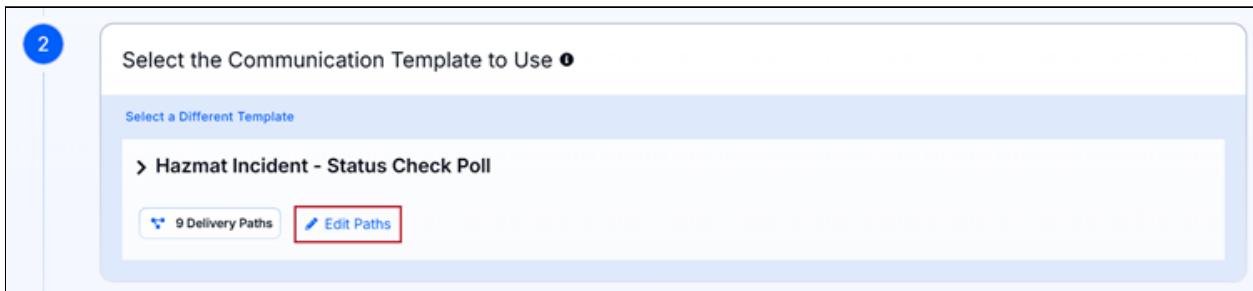
Select the desired Delivery Paths from the SMS, Email, Voice, Mobile App, Plain Text, and Business messaging Apps sub-tabs. Once finished, click **Save.**
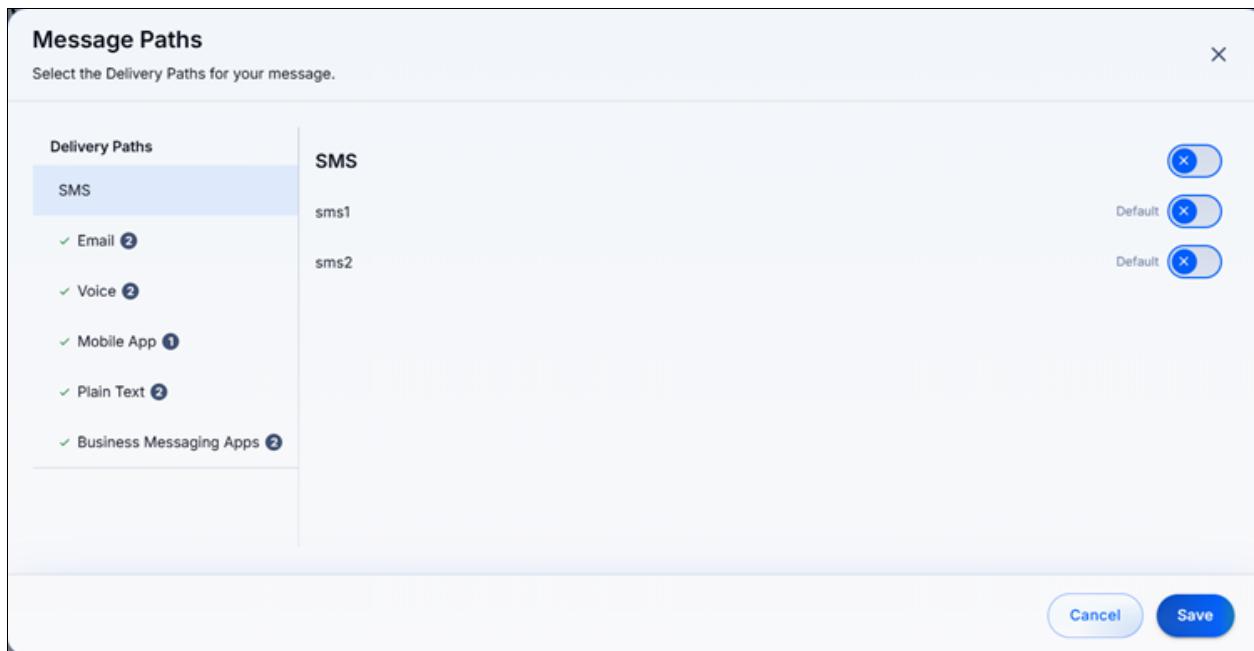
If you've chosen an Incident template rather than a Notification Template, you can populate the information in the variable information fields of your template form.
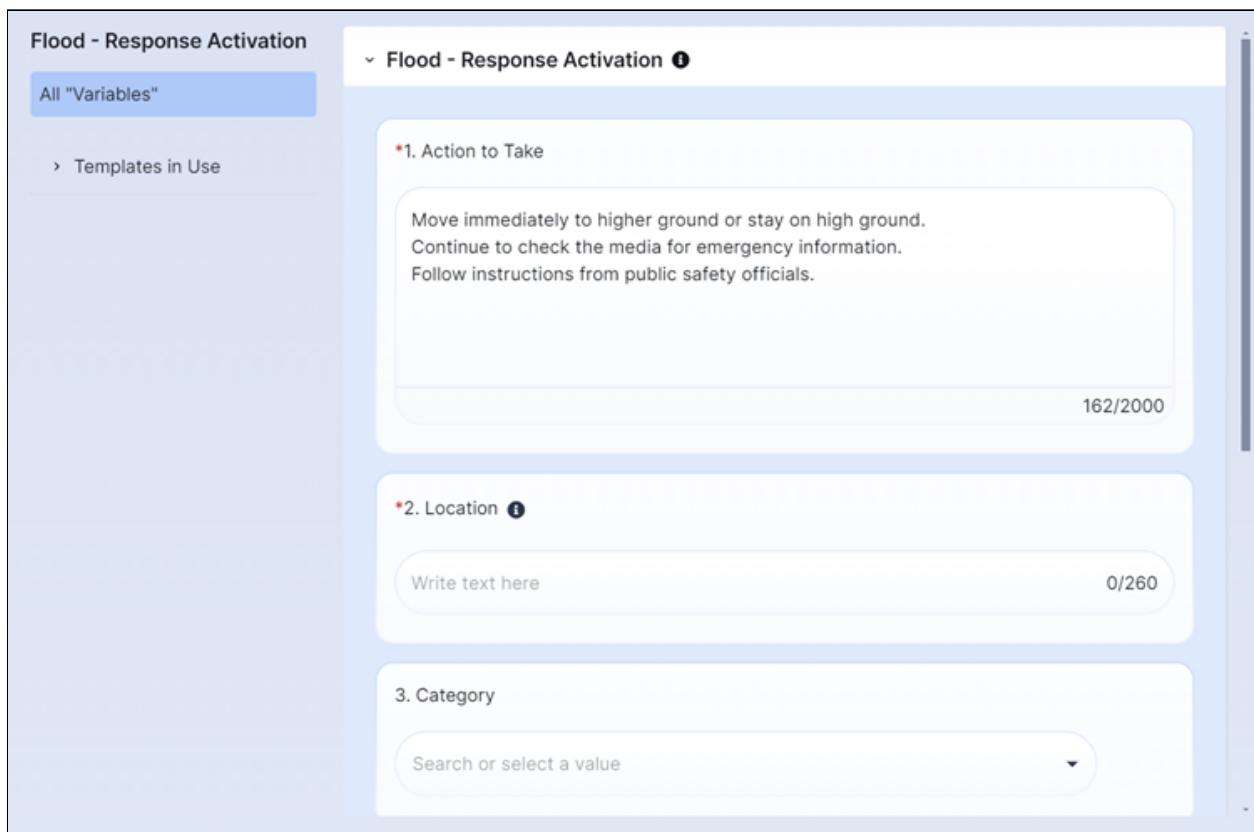

To complete variables:

1. Complete the fields with your situation-specific information. The available fields depend on how the template has been configured by your Administrators.

   - Required fields are indicated with a red asterisk(*).
   - Fields in white are editable. Fields in gray cannot be changed.

2. Click **Apply Variables at the bottom** to use the selected values in the following sections.

Ad-Hoc Communications

By clicking **Send Without Template**, users can also send a message ad-hoc without a preexisting template using their Organization's default settings and permissions. Message templates will be recommended based on the chosen Event Type and the name of the template containing the event name. If the template desired template is not automatically shown, they can be searched for.
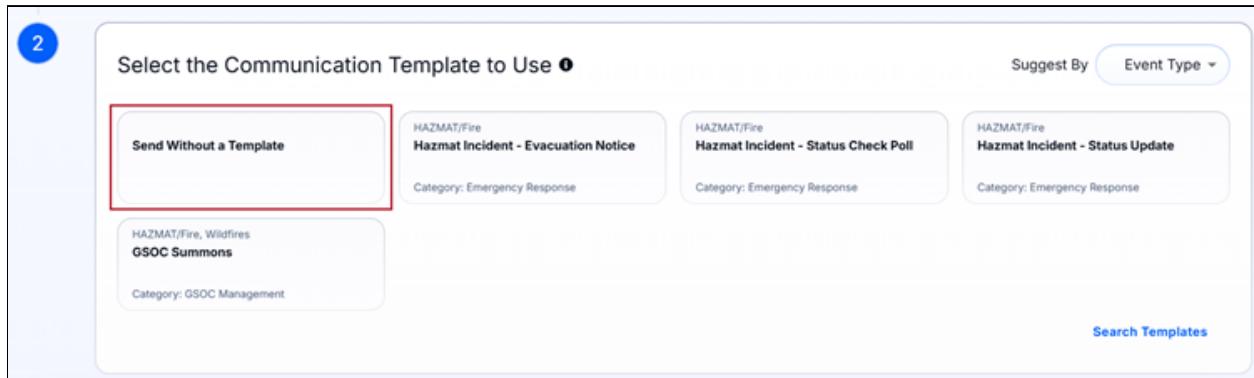
Message delivery paths for an ad-hoc Communication will default to the Organization settings but can be changed to Custom. Templates will have predefined delivery paths. You may or may not be able to change custom paths when sending a Communication.

> **NOTE:** Available delivery paths are configured by an Account or Organization Administrator under **Settings** > **Organization** > **Notifications** > **Delivery Methods**.

Step 3: Configure Public Settings

Continue to the **Configure Public Settings** section, where the Communication's priority can be set as follows:

- **Imminent Threat to Life** (if enabled for Organization) - Communications flagged with **Imminent Threat to Life** (ITL) mean the event:
    - has just occurred (for example, an earthquake, volcanic eruption, or failed life-support system), or
    - is in progress (for example, an active shooter or nuclear power plant emergency), or
    - is expected to happen today (for example, severe weather), or
    - the lives or safety of message recipients are immediately at risk.
    - (only applies to Apple/iOS devices) becomes a critical alert when the message is sent to Everbridge Mobile App. Critical alerts:
        - make an audio sound when delivered, even if your device is silent. (If your device is not on silent, the audio tone is based on your selections in app settings).
        - are displayed until you tap on it.
        - are displayed with a warning icon.
    - **An Active Shooter event** in the proximity of a recipient's location, or a life-threatening weather event are both examples of ITL situations.

      The following Communications are not typically considered Imminent Threats to Life:
        - Communications to recipients to inform them of an active shooter at another location, a weather event that will impact a different location, or a weather event that is still days away.
        - Communications sent after the initial ITL message UNLESS there is a material change from the initial Communication AND the change results in an immediate increased risk to life and safety.
        - Communications sent to recipients who are not at risk for life and safety regardless of the type of Incident.
- **High Priority** - High-priority messages are given priority in your message queue and are flagged in your recipients' inbox.
- **Standard** - No priority has been given.

Step 4: Configure the Message

To configure your message:

1. **Exercise Mode:** Communications sent in Exercise Mode are meant to test communication plans, such as allowing recipients to practice receiving and responding to messages similar to those they'd see in a real emergency. The **[DRILL]** tag will be prepended to the message's Subject and Body so that contacts will immediately know that it's an exercise.

2. Specify your message type. There are three types of messages:

   - **Standard** - Standard messages are used to send communication to people through a variety of methods including voice, text, and email. Confirmations can be requested from contacts that receive standard messages. Standard Messages can be emergency messages or informational messages.

   - **Polling** – Polling messages are for sending a Communication to contacts and presenting them with a menu of responses for them to choose from. When contacts receive the message, they can reply with one of the choices. Then users can view the responses to know each contact's answer.

     ○ A polling message can have a quota associated with it. This is when not only a response is requested but a certain number of responses are needed. A quota might be for people, such as locating employees to work overtime or volunteers to staff an event

   - **Conference** - Conference messages are messages that ask contacts to join a conference call. This could be an emergency where contacts need to discuss a situation immediately or it might be a convenient way to pull in a team for a weekly status meeting.

3. Add a **Subject** and your message's **Body** text. The body field can accommodate 2500 characters for Email/Fax, and 459 characters for SMS.

   - The subject of your message will be automatically configured based on the event type chosen. In the **Subject** field, you can amend the title of your message.

4. Click **Add Custom Message** to add a message to the previously selected Message Paths for the Communication. Everbridge recommends you always send custom messages per delivery method, if possible. This helps to avoid message fatigue and enables contacts to consume messages in the most efficient way possible, per device.
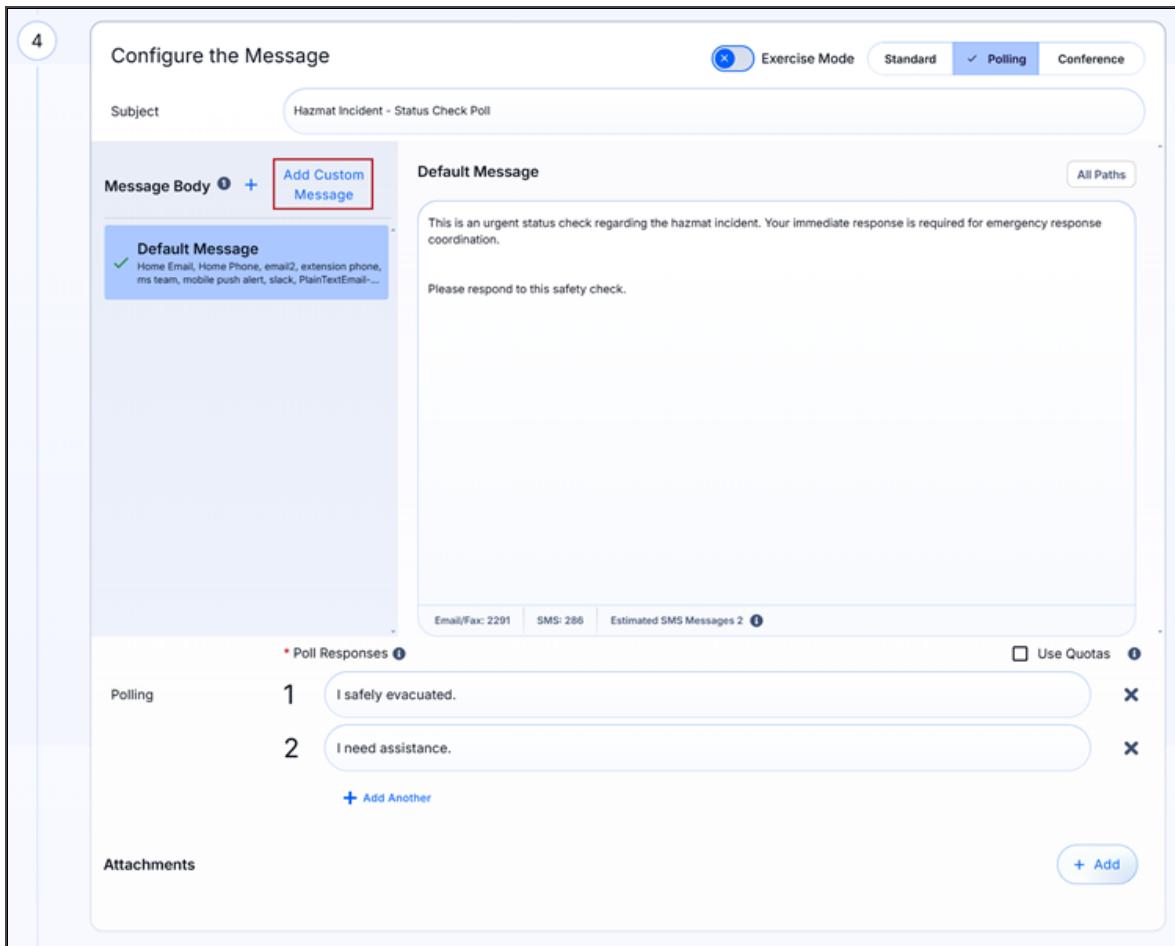
When adding a custom **message path** you can use the same text for all your delivery methods, or you can choose to have separate text for SMS, Email, Voice, Mobile App, and Plain Text. See Rich Text Editor Best Practices for

[Custom Delivery Paths](#) for more on configuring custom messages.

Customize Message Paths   ×

Please select the delivery paths for which you would like to define customized content

Default Message

SMS

Email

Mobile App

Everbridge Web Widget

Alertus

Member Portal

Facebook

X (Twitter)

Everbridge Network

Cancel   Save
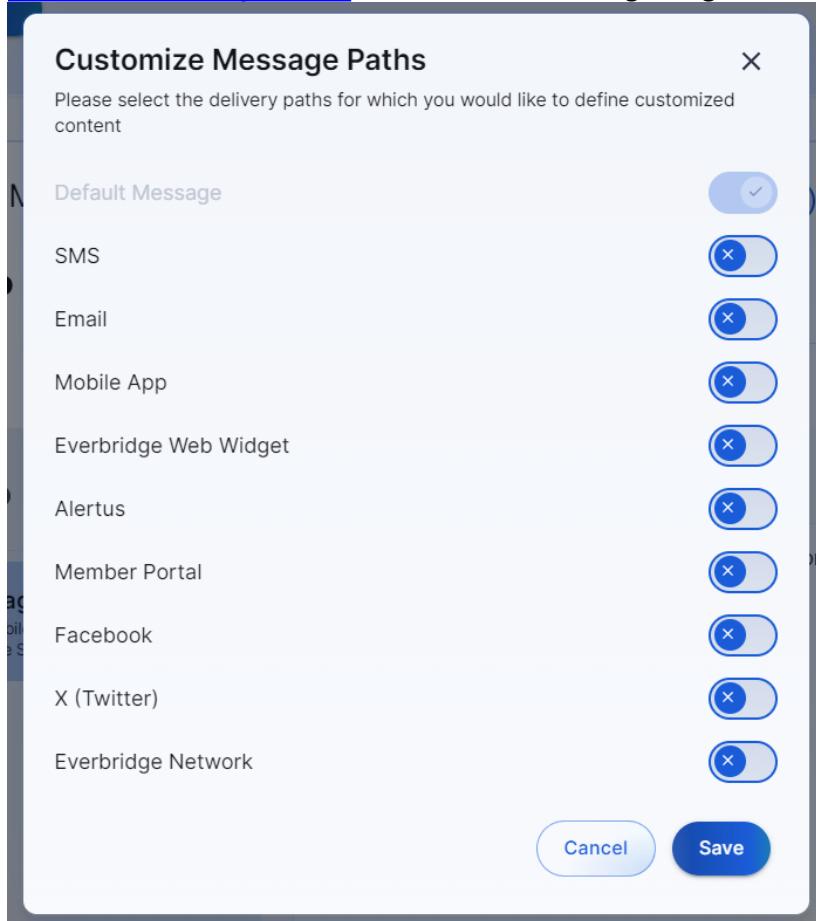
5. Select **Add** under the **Attachments** section at the end of Step 3 to attach up to five files to a message. The maximum file size is 20 MB. If an attachment is more than 20 MB, it will be sent as a link in the Communication. Each filename should be no more than 80 characters. You can attach files if the

Communication is to be sent via email or the Everbridge Mobile App.

Add Attachments

5 files or 20 MB of attachments will be sent through supported paths. ⓘ

Drop files here
or click here to select a file

Cancel   **Attach**
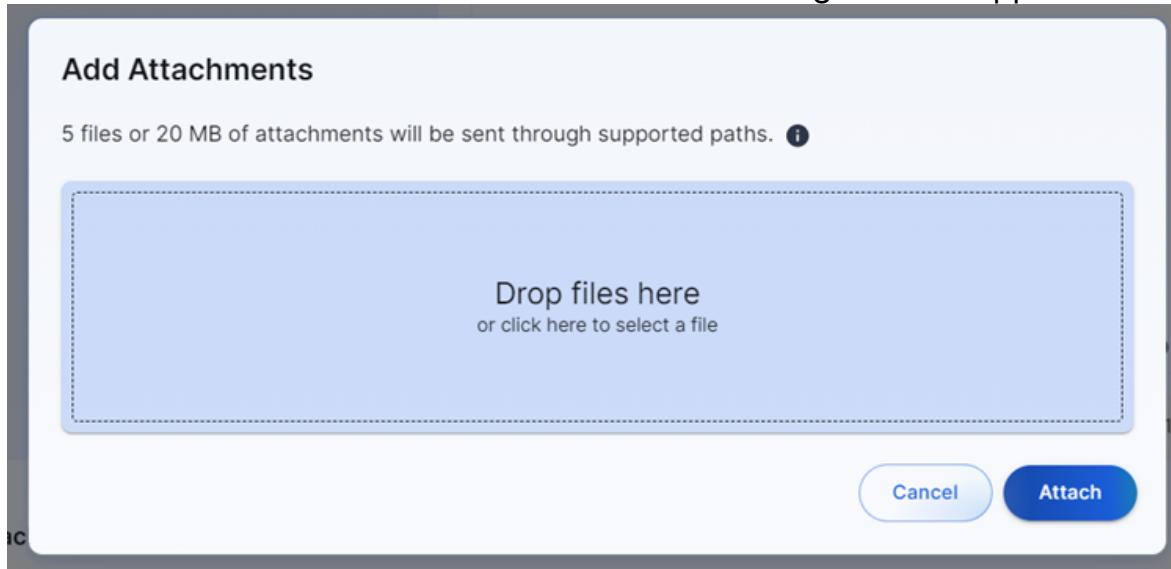
Step 5: Recipient Management

Choose the Contacts that will receive the Communication. Recipients identified via Groups, Individuals, Rules, and the Map may be prefilled based on the template chosen and the Alert for users launching a Communication from Visual Command Center.

> **NOTE:** Logic for Recipients in the Area:
>
> **From a VCC Alert –** Contacts within the specified Map/Polygon of the selected Template, as well as Contacts within the Polygon of the Alert itself.
>
> **Without an Alert –** Contacts within the Map/Polygon of the selected Template (if it contains a Map/Polygon).

1. Under **Add Recipients**, you can configure who you want to send a Communication to. A Communication may already have some predefined contacts. However, in the moment and if permitted, you may want to add more contacts to a Communication depending on the situation. Depending on your requirements, select the individuals and groups you want to send the Communication to.

Note that the available data columns present on the **Individuals** tab of the recipient-picker are determined by the choices specified under **Settings > Organization > Everbridge 360 > Communication Recipients.**
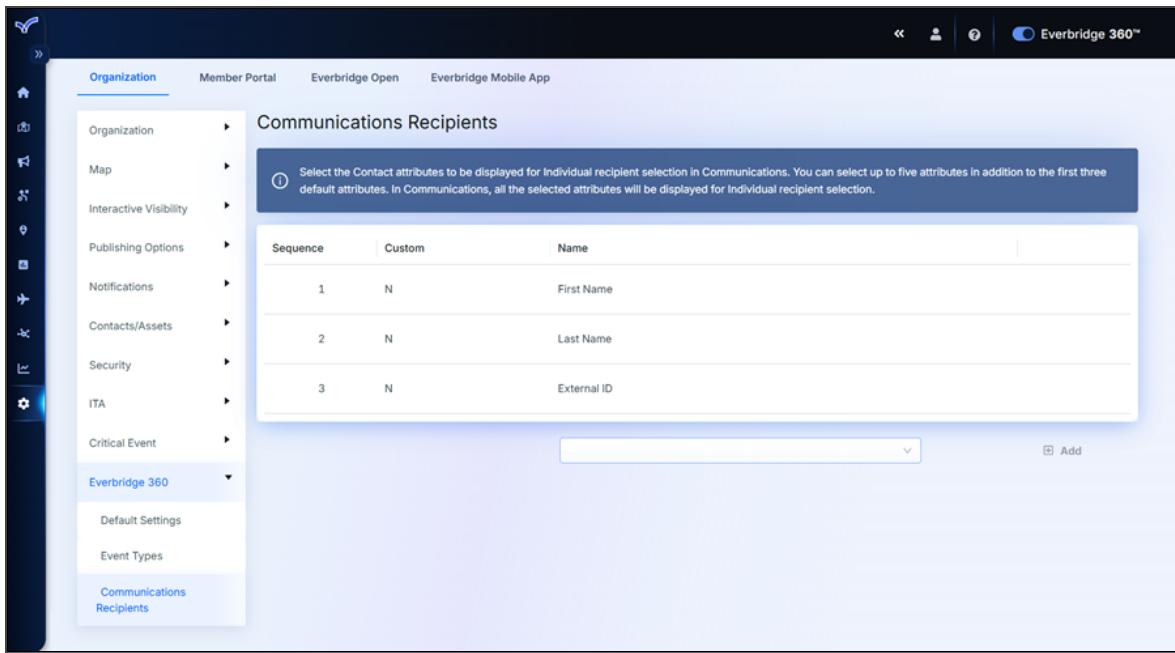
- **Groups** - Click **Groups** to select groups your Organization has created.
- **Individuals** - Click **Individuals** to select individuals by name.
- **Rules** - Click **Rules** to apply rules that your Organization has defined to select contacts with certain attributes. Rules are preconfigured by your Incident Administrator.
- **Map** - Click **Map** to open an interactive map and select recipients by drawing a shape to capture any Contacts within its borders. Select the desired Shape type at the top (Radius, Rectangle, Area), click the area of the Map to start the shape, then drag it as needed to stretch, resize, or move. Note that the Area type requires a double-click to close the shape. Ensure that the **Include Recipients in the Area** option is toggled **On**.
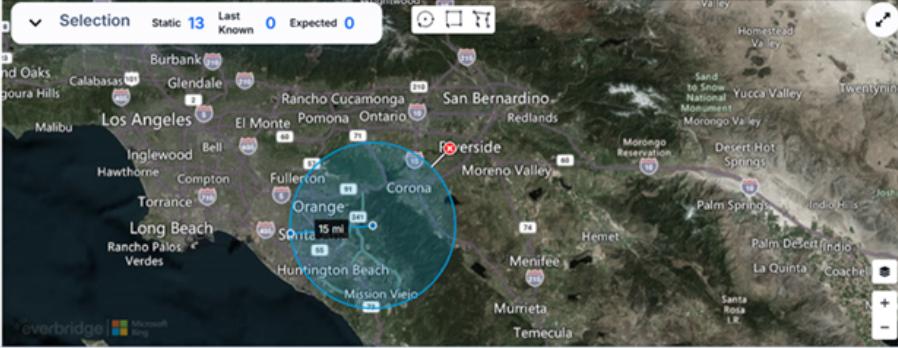
The Map can be viewed in full-screen mode by clicking the **Expand** icon in its top-right corner, offering the operator more room to accurately isolate the correct recipients. It can be collapsed again by clicking the **Collapse** icon. Any shapes drawn in either mode will be retained.
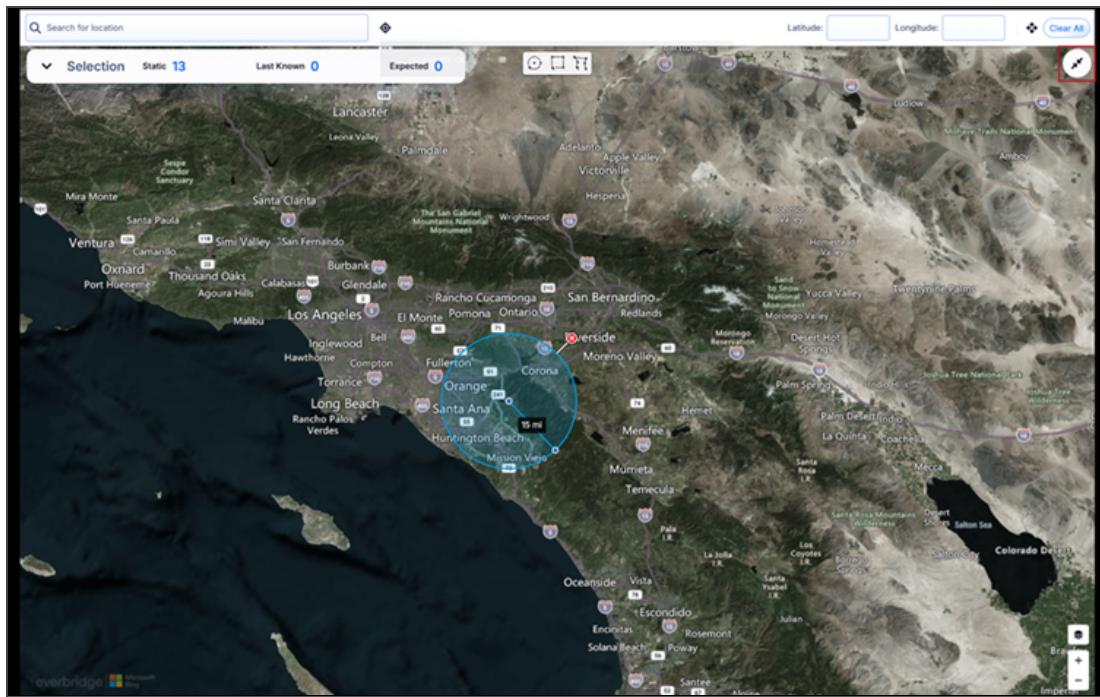
Click the **Selection** widget to apply **Location Type** (Static Location, Last Known Location, and Expected Location, which includes Travel) and **Contact Type** filters.
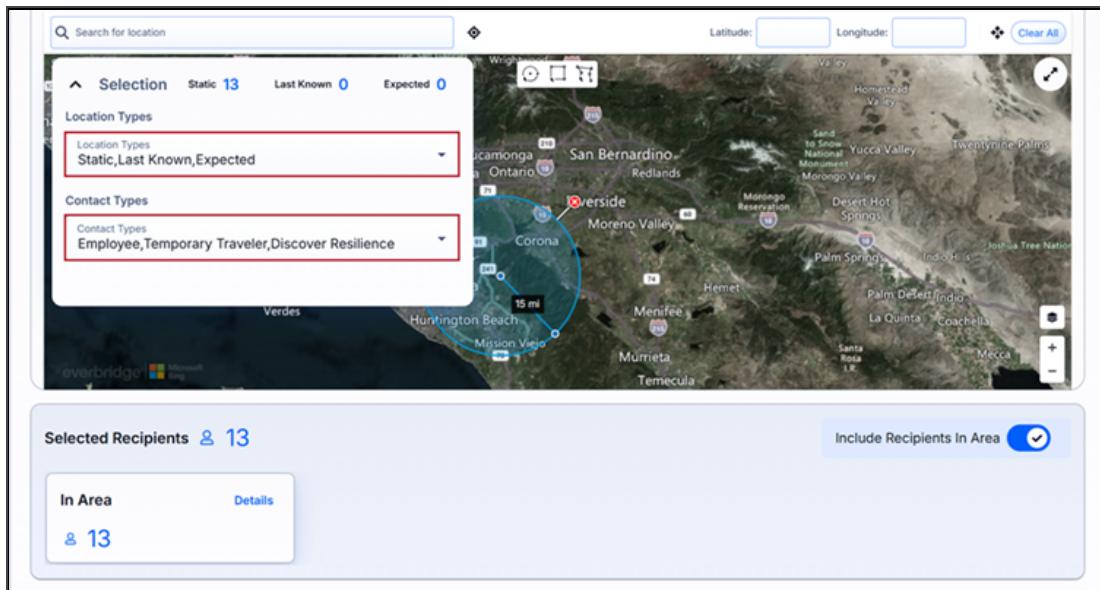
Users can search for specific locations in the **Search** bar at the top of the modal, which will create a **Location** spot on the Map. The Location can be as specific as a singular address or as broad as a continent.
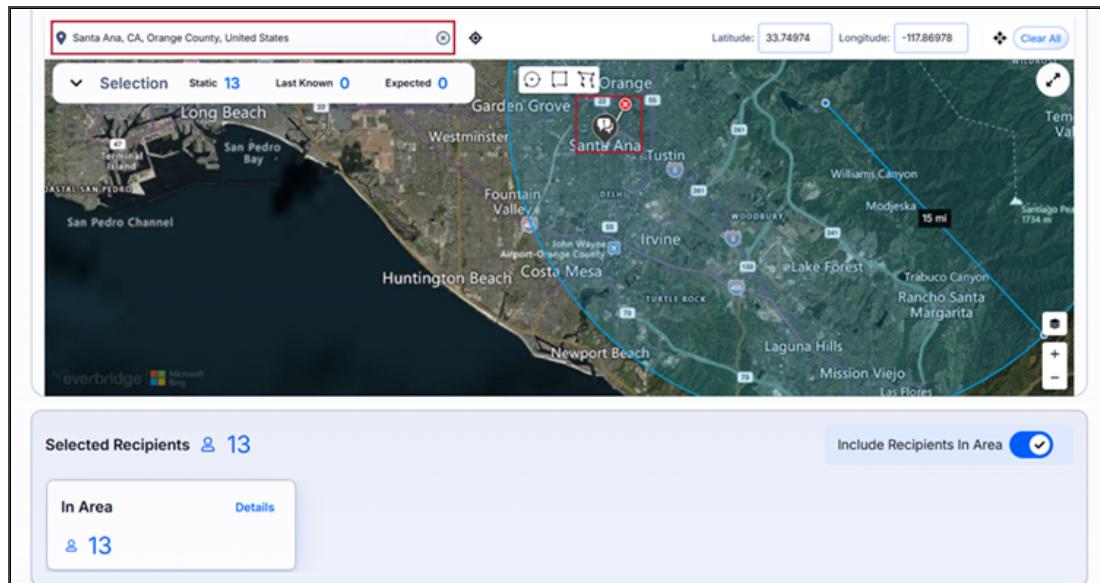
Click the **Details** button on the **In Area** widget at the bottom of the modal to review the recipients captured by the drawn Map area.

Individual recipients can be viewed and removed from the selection by

clicking the **View** or **Exclude** buttons, respectively.
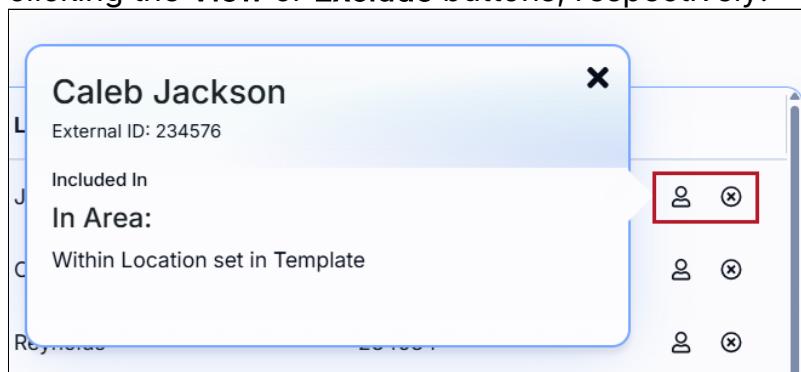
2. Clicking the count of unique recipients opens the **Recipient Details** modal, which displays recipients that have been added via Groups, Individuals, Rules, or as a recipient in the area.

Click the **View** icon to see how a specific contact was included (via Groups, Rules, etc.), or click the **Exclude** icon to remove recipients from

Communication without impacting Groups or Rules.
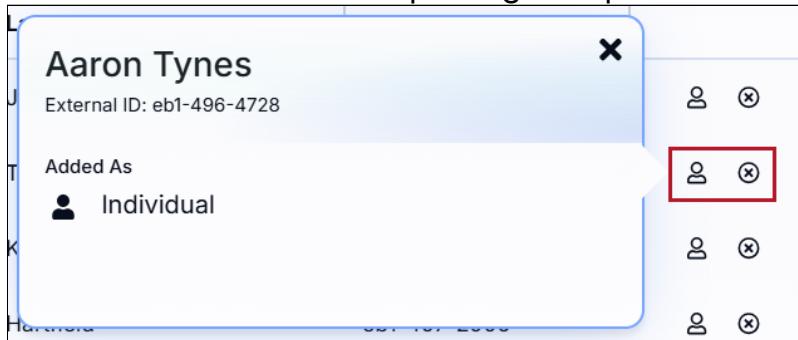
3. Click **Done** to finish setting the Recipients.

Step 6: Settings

1. Click the **Settings** cog icon on the **Communications Toolbar** to configure the message settings, which allow you to adjust different options to optimize your message.
   - **Content** - The language setting for communication that dictates the language in which contacts receive voice and email prompts. This setting does not translate any text entered in the title or body of a communication, nor does it translate the text-to-speech message. However, the text-to-speech message will be read using the selected language's accent.
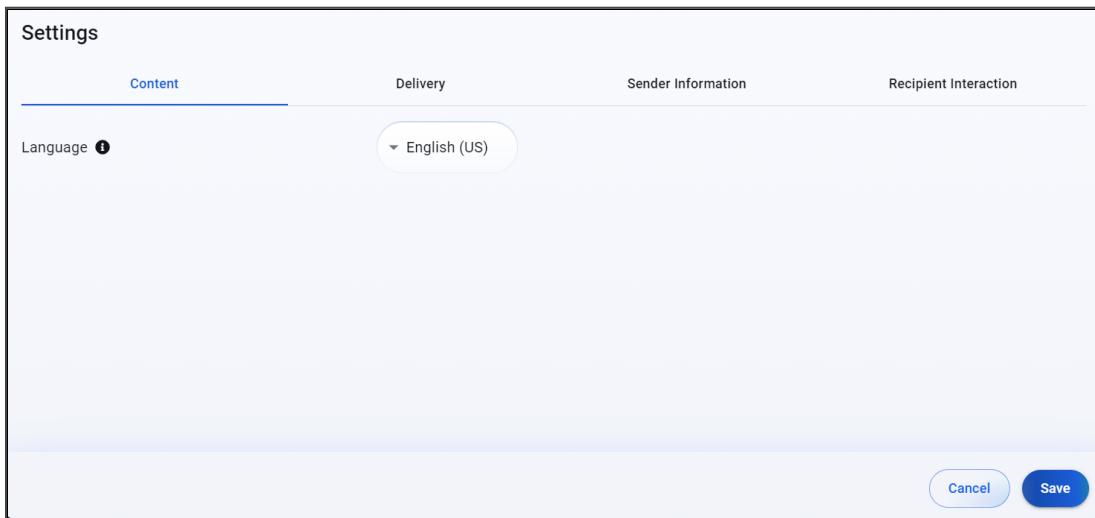
   - **Delivery**
       - **Order** - There are three different delivery order modes in Everbridge Suite settings:
           - **Organization Default** - Uses the sequence specified in the organization's settings tab for notification delivery methods,
           - **Contact Preferred** - Uses the sequence specified in each contact's record,

- **One-Time Custom** - Uses the sequence specified at a notification's creation, and overrides all other preferences.
  - **Wait Between Delivery Paths** - Controls how long the system waits before moving on to the next delivery method for a contact.
  - **Contact Cycles** - Controls how many times Everbridge attempts to deliver the message across all of the device types for the contact.
  - **Wait Time Between Cycles** - Controls how long the system waits before starting another cycle of Communication.
  - **Broadcast Duration** - Controls how long the Communication is active to send messages and receive confirmations.

Settings

Content	Delivery	Sender Information	Recipient Interaction

Order ⓘ ▾ Organization Default

Wait Between Delivery Paths ⓘ ▾ 0 Minutes

Contact Cycles ⓘ ▾ 1

Wait Time Between Cycles ⓘ ▾ 0 Minutes

Broadcast Duration ⓘ ▾ 1 Hours

Cancel Save

- **Sender Information** - Specify the following information:
  - **Email Sender Name** - Allows you to change the address to something that is recognizable to the contacts, so they are more likely to open it.
  - **Reply to Email** - Allows you to set a custom email that your contacts can reply to for more information.
  - **Caller ID** - Allows you to change the phone number that your contacts see displayed when they receive a Communication via phone.

Settings

Content	Delivery	Sender Information	Recipient Interaction

E-mail Sender Name ⓘ Email Sender Name
EverbridgeEnterpriseAlerts

Reply to Email ⓘ ▾ Organization default

Caller ID ⓘ

United States 🇺🇸 ▾ +1 616 780 <Default>

Brazil 🇧🇷 ▾ +55 11 2345

United Kingdom 🇬🇧 ▾ +44 121 234

Cancel Save

- **Recipient Action** - Configure the below options:
  - **Request Confirmation** - Allows you to request that your contacts confirm that they have received the message. It also stops any further attempts to reach contacts.
  - **Everbridge Mobile App** - Allows you to control various settings related specifically to the Everbridge Mobile App, such as:
    - Request Location
    - Request Image
    - Request Additional Information
    - Enable Sharing Options
  - **Voicemail Preference** - Controls what Everbridge does when leaving a voice message. You can select whether to end the call, leave a message, or leave a message with call-back information to confirm that it was received.
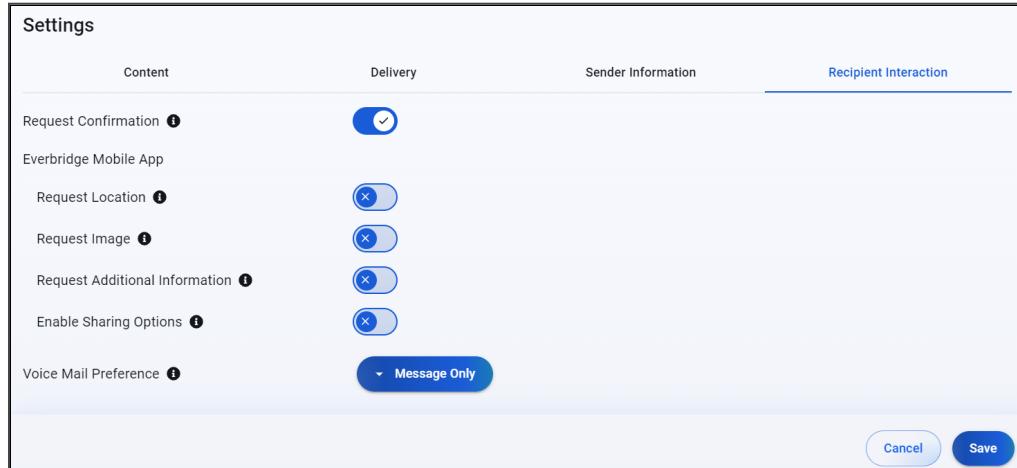
Step 7: Review and Send

1. Click **Review** on the **Communications Toolbar** to review SMS, Email, Voice, Mobile App, and Plain Text delivery paths before sending with the context of the number of recipients, send time, and whether the message is being sent during the day or night. **Voice** is a recording that can be listened to prior to launch.

2. Once all required fields have been completed and variables have been applied, the **Launch Communication** button on the **Communication Toolbar** will turn blue to enable sending the Communication. Click it to start the launch.

3. The **Launching Communication** modal will appear with two options:
    1. **Stop Communication** - This allows the user to pause the launch and return to the previous screen to correct any possible errors.

2. **Launch Immediately** - Launches the Communication and closes the modal.
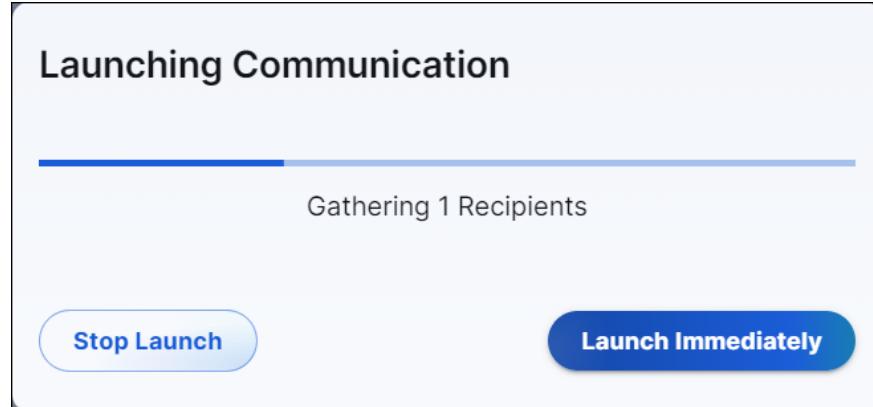
- **NOTE**: If neither option is selected, the Communication will automatically launch after the modal times out.

Launching a Communication from an Alert

Communications can be launched directly from an Alert from both the Alert Management and Visual Command Center interfaces, allowing operators to inherit crucial details from the Alert and apply them to the Communication to save time, such as any included shapes.

NOTE: This page describes launching a Communication from the **Alert Management** interface, but note that the logic and process are the same when launching from an Alert in Visual Command Center.

To launch a Communication from an Alert:

1. Navigate to **Alert Management**.
2. Click the desired Alert to open its **Alert Details** page.
3. Click **Launch Communication** from the **Actions** toolbar.

4. The **Launch Communication** modal will open. Select the applicable Event Type from the dropdown menu, which will be used to suggest Communication Templates in the next step.
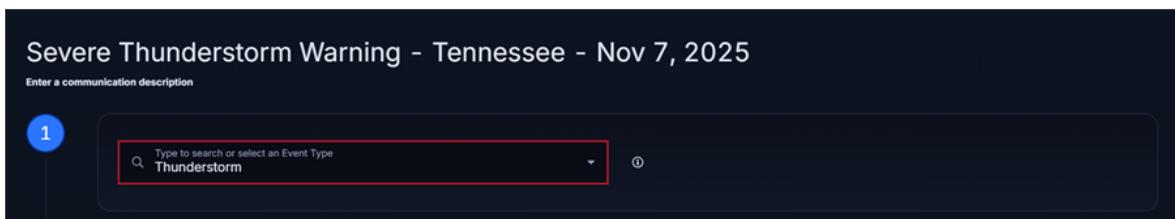
5. Select an appropriate Communication Template for the situation, or select **Send Without a Template**.
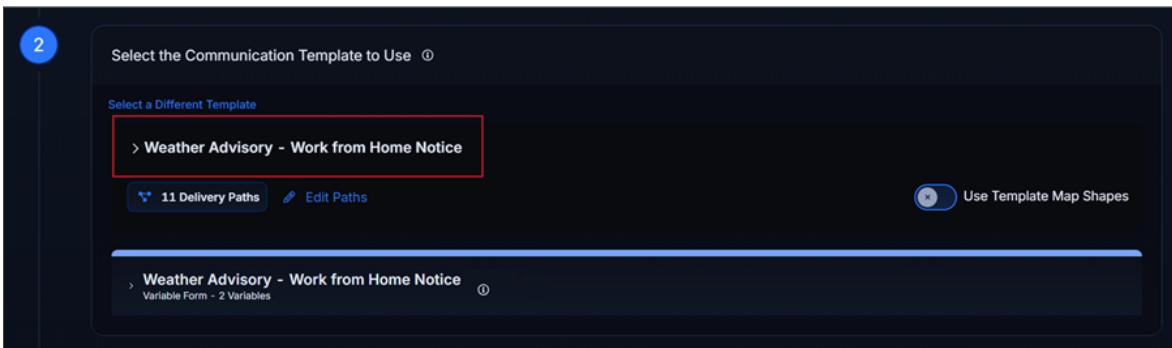
- Note that if the selected Communication Template contains a Map Shape, the **Use Template Map Shapes** toggle will appear. By default, the system applies the polygons from the base Alert to the Communication area to ensure accuracy in reaching impacted individuals, even if the selected template includes its own shapes. Selecting this option replaces the Alert polygons with the shapes defined in the chosen template, instead. Click **Use Template Shapes** on the confirmation modal to proceed.
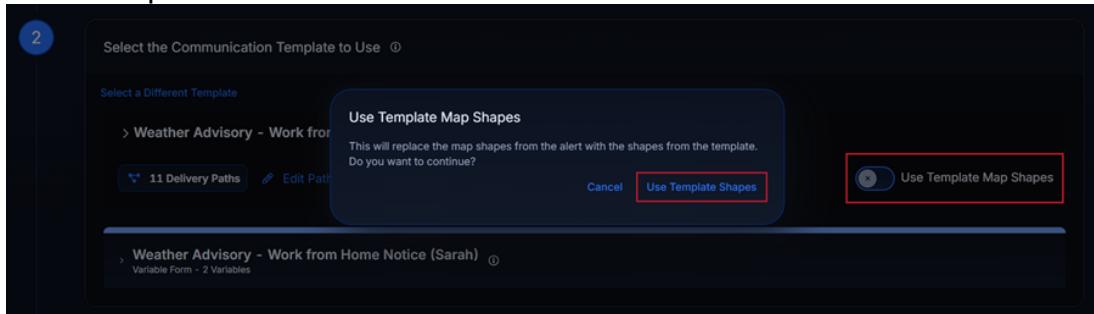
6. Follow **Steps 2-4** (starting at [Message Paths](#)) as outlined in [Launching a Communication from Everbridge 360](#) to configure in the Communication's **Delivery Paths**, **Public Settings** and **Message**.
7. In the **Attachments** section, attach any relevant files to send to recipients. If the selected Communication Template contains Map or Report files, they will be automatically included in the Communication, avoiding the manual attachment steps during time-sensitive situations. Note that, if needed, these inherited Map and Report files can be removed from the Communication during launch by deselecting the corresponding checkbox.
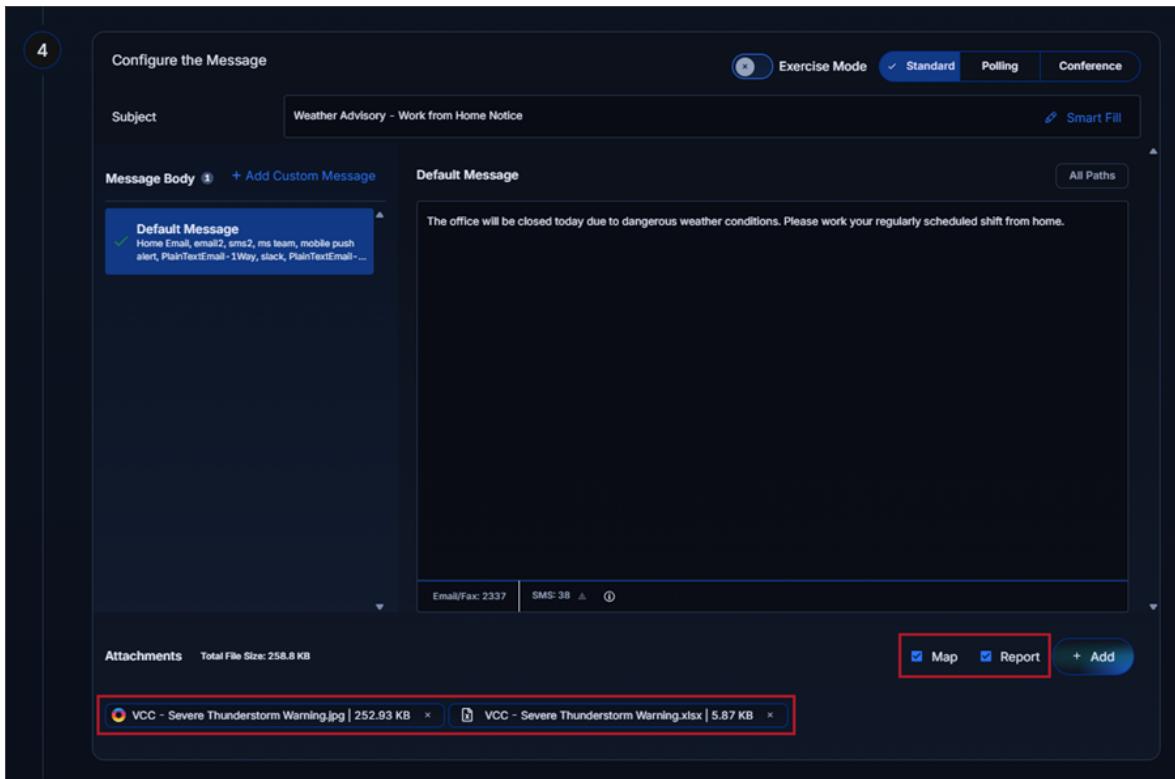
8. Under **Add Recipients**, select the Contacts that will receive this Communication via Individuals, Groups, Rules, or the Map. Note that Alert-based Communications are most effective when sent using the **Map** option. Use either:

   - **Alert Shapes** – By default, the Communication will apply the shapes included in the base Alert. Clicking **Include Recipients in the Area** will allow any Contacts contained within that shape to be included as a recipient for the Communication.
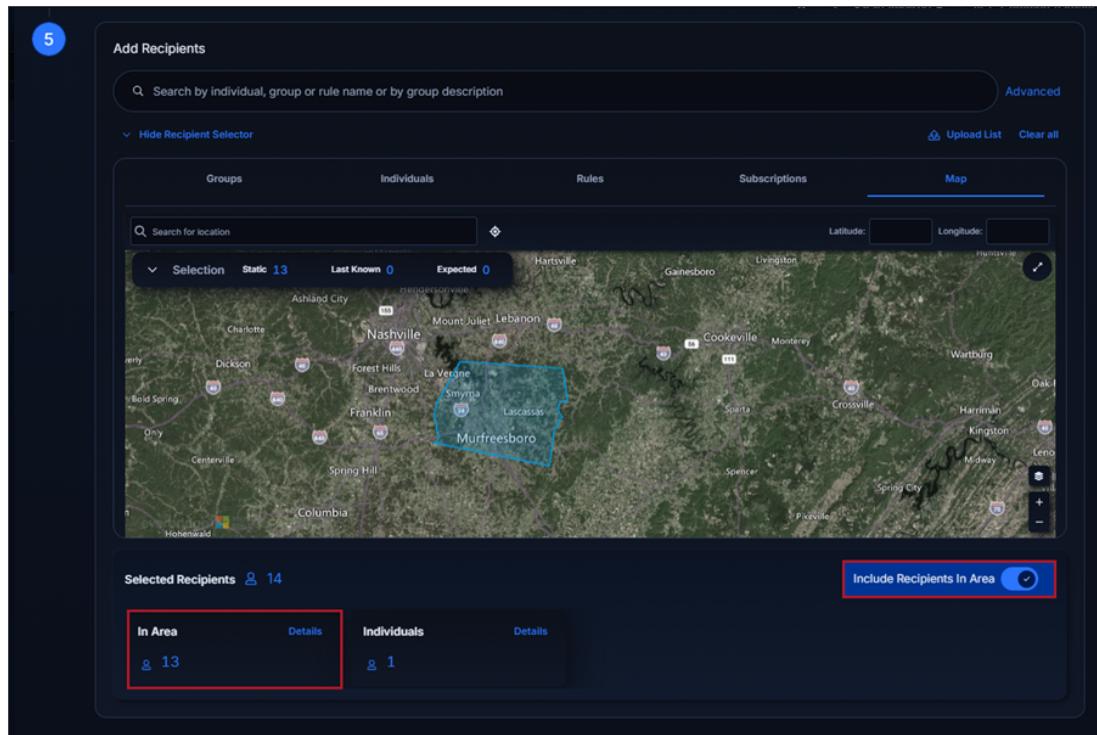
- **Template Shapes** - If the **Use Template Map Shapes** option was selected in Step 5, then the shape included in the chosen Communication Template will appear here instead of the Alert's shape. Clicking **Include Recipients in the Area** will allow any Contacts contained within that shape to be included as a recipient for the Communication
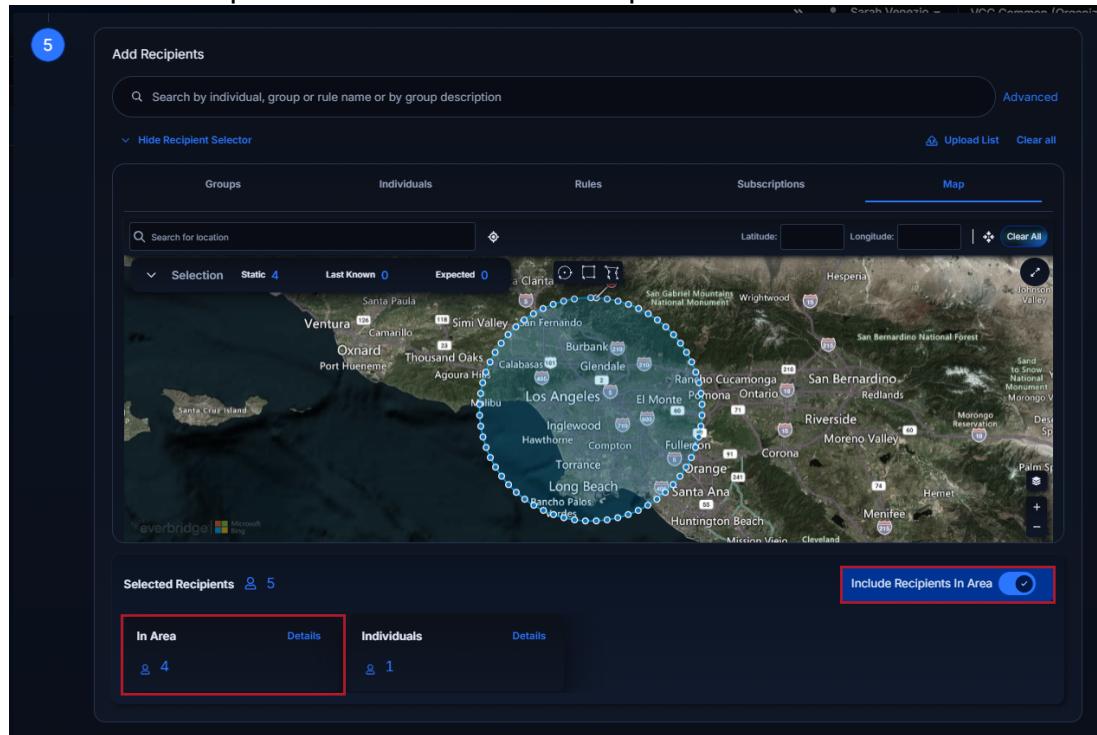
9. Continue with **Steps 6-7** of [Launching a Communication from Everbridge 360](#) to configure the Communication Settings and perform the pre-launch Review.
10. Click **Launch Communication**.

Permission Requirements

The following permissions are required for operators to use the Communication Template's shape instead of the Alert's shape:

- **View Permissions for Contacts:**
  - Users can see polygons but cannot edit them.
  - Polygons are read-only in the interface.
  - Visual indicators of read-only status.
- **Edit Permissions for Contacts:**
  - Users can edit template polygons (in a non-Alert context).
  - Can modify polygon boundaries.
  - Can change Location Type.
  - Can change Contact Type.

Alert Polygon Restrictions

The following restrictions apply when working with Alert polygons to maintain integrity of Alert-defined areas:

- Alert polygons are **ALWAYS** read-only.
- They cannot be edited, even with **Edit** permissions.

Important Considerations

Keep the following considerations in mind when launching a Communication from an Alert:

- The Communication will automatically inherit and apply the base Alert's map shapes unless the **Use Template Map Shapes** option is selected.
- Both shape options (Alert's shape and the Communication Template's shape) require that the operator select the **Include Recipients In Area** toggle in the **Add Recipients** section in order to capture the recipients within its boundaries.
- Depending on the specific use case, the template's shape provides the following benefits:
  - Provides predefined Communication areas that match business needs.
  - Enforces standardized geographic boundaries for specific scenarios.

- ◦ Template-based areas that may be broader or more specific than the base Alert.

Scheduling Communications

Users can create one-time or recurring **Scheduled Communications** using either Templates or custom messages, allowing them to maintain complete control over the schedules, such as editing the message content, adjusting delivery timing, temporarily pausing recurring schedules, or deleting schedules entirely. This lets Organizations prepare Communications during their normal business hours and send them automatically when stakeholders need them most.

Scheduled Communications can be created and managed from **Communications > Everbridge 360 > Scheduled.**
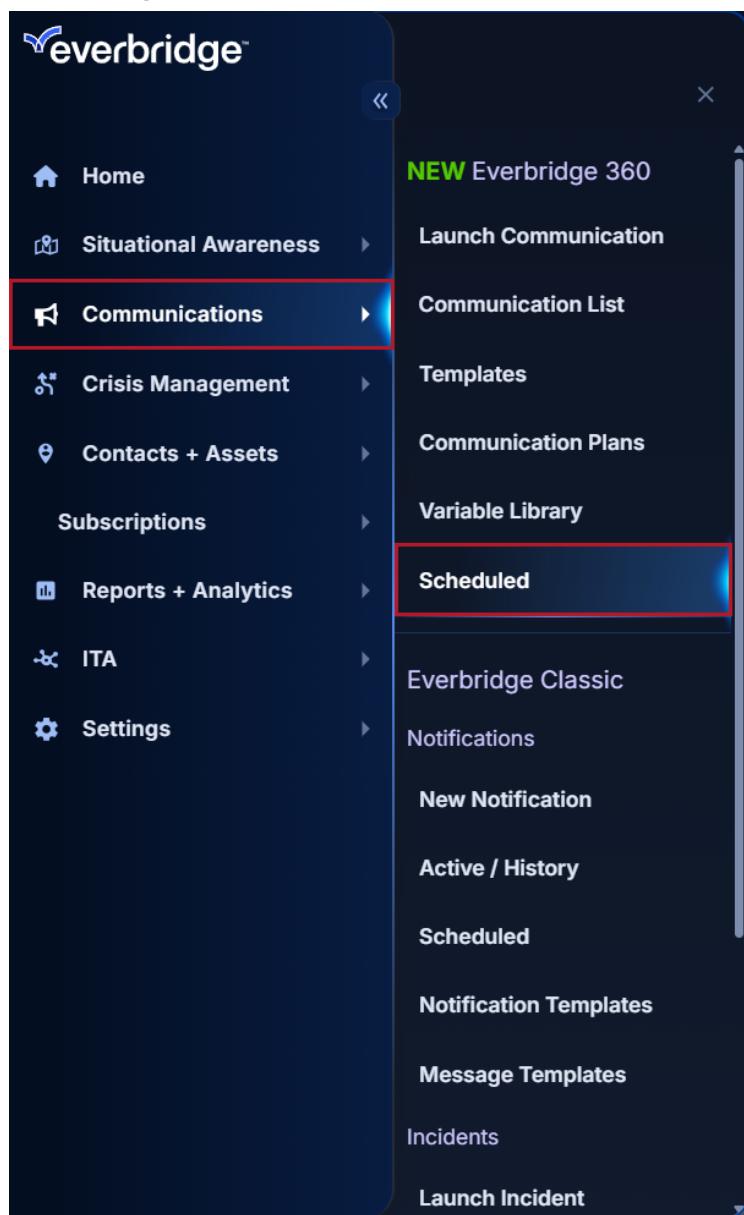
Creating a Scheduled Communication

Scheduled Communications can be created from either the **Communications List** or **Scheduled Communications** pages. To schedule a Communication:

1. Click **Launch Communication.**
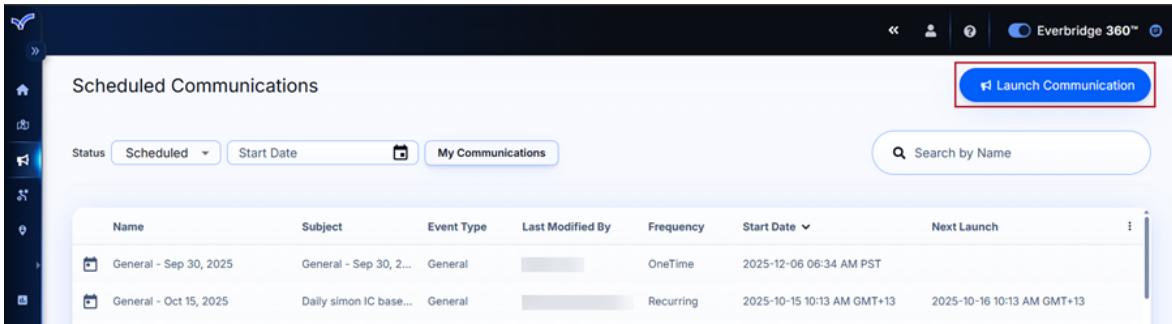
2. The **Launch Communication** page will open. Follow the **Steps 1-6** as outlined in Launching a Communication from Everbridge 360 to create a Communication either with or without a Communication Template.

3. Once the Communication has been configured as desired, click **Schedule Communication** on the **Communications Toolbar.**

4. The **Schedule Communication** modal will open. Name the Schedule (or keep the default name), then choose from one of the following **Frequency** options:

   - **One Time** - Schedules the Communication to be launched a single time at a specified time and date.

○ Choose the **Date** from the date-picker, which is also present on the rest of the **Frequency** options.
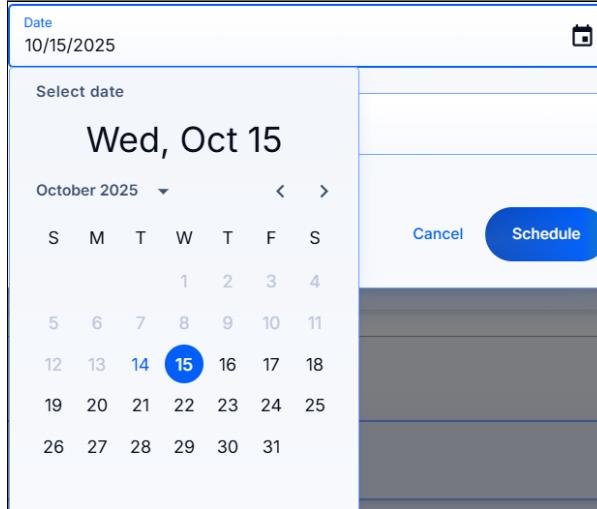
○ Choose the **Time** from the time-picker, which is also present on the rest of the **Frequency** options.
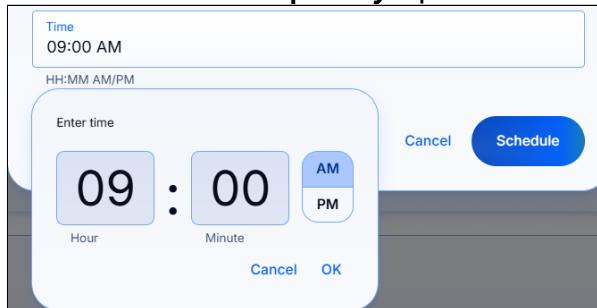
- **Daily** - Schedules the Communication to be sent daily at a certain time for a specified period of time. Choose the Repetition interval, Start Date,

End Date, Launch Time, and Time Zone.

Schedule Communication

Schedule Name
Daily Department Reminders

Frequency
Daily

Repeat Every

Day
1

Start Date

Date
10/15/2025

MM/DD/YYYY

End Date

Date
10/15/2026

MM/DD/YYYY

Launch Time

09:00 AM

HH:MM AM/PM

Time Zone

Time Zone
(GMT-07:00) Pacific Dayli...

Cancel   Schedule
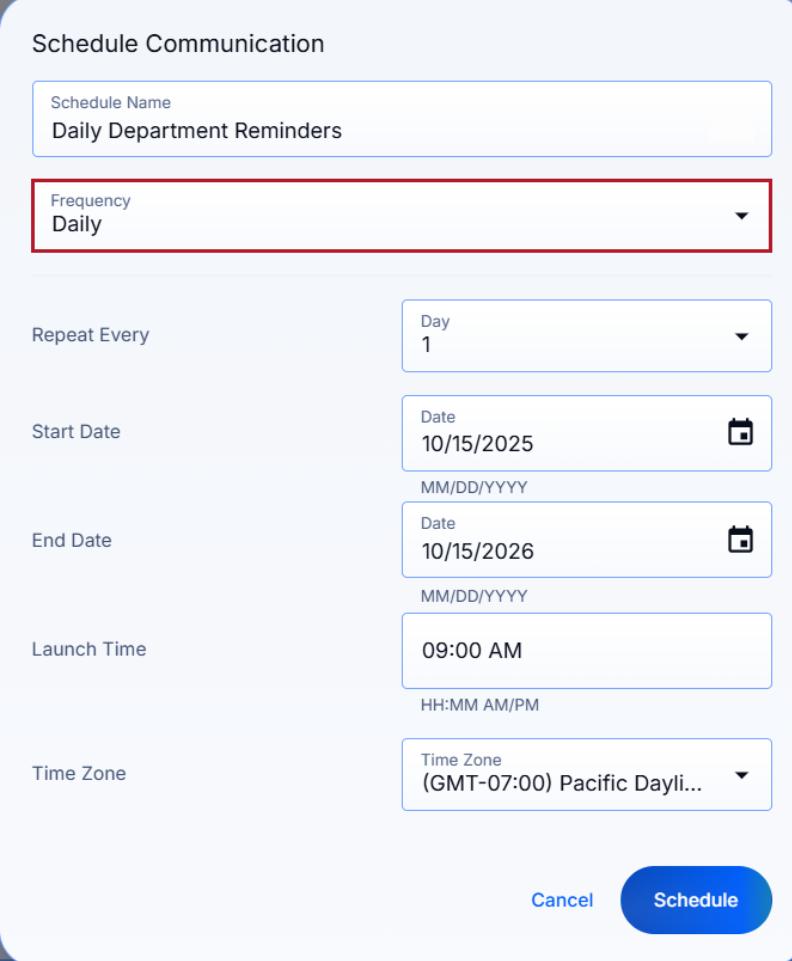
- **Weekly** - Schedules the Communication to be sent on a weekly basis for a specified period of time by selecting the repetition pattern, the

desired weekday, Start Date, End Date, Launch Time, and Time zone.
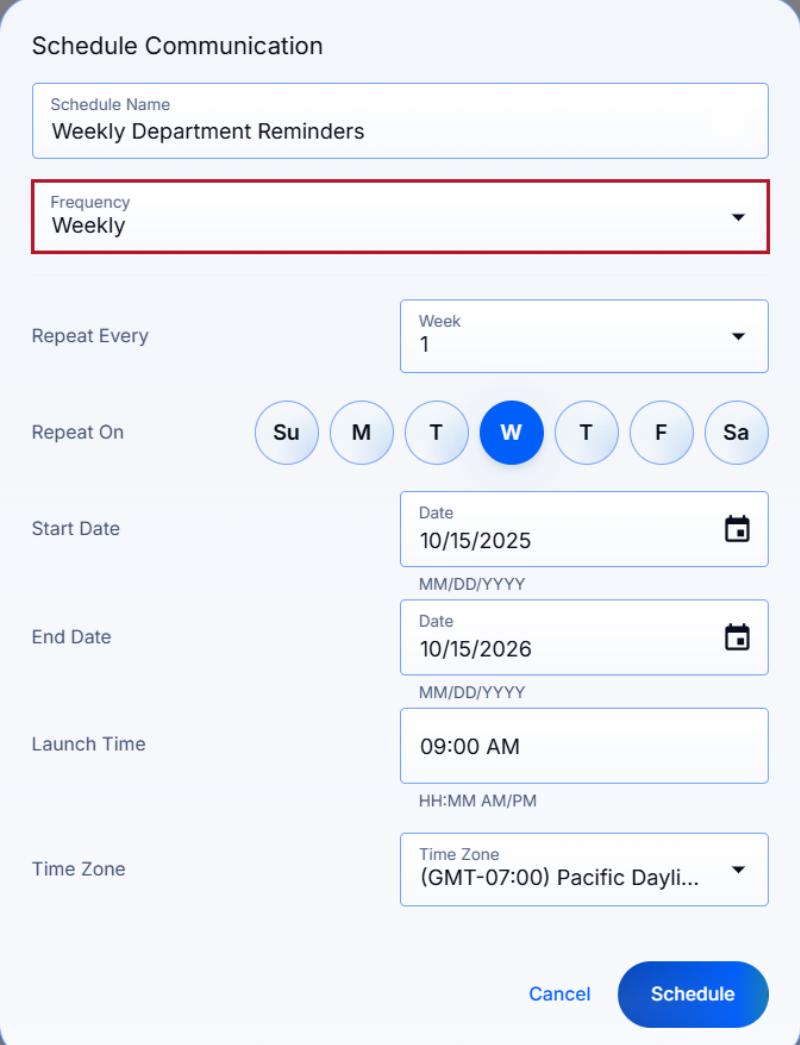
- **Monthly** - Schedules the Communication to be sent on a monthly basis for a specified period of time. Choose the repetition pattern, Start Date, End Date, Launch Time, and Time Zone.

Under **Repeat On**, select either:

- **Date of Month** every **X** amount months.

- **Place in Month** (First, Second, etc.), **Day of the Week**, of every **X** amount of months.

- **Yearly** - Schedules the Communication to be sent on a yearly basis. Choose the repetition frequency, Start Date, End Date, Launch Time, and Time Zone.

5. Click **Schedule** to save the launch schedule
6. The **Schedule Communication** modal will close. Review the Communication for accuracy, then click **Schedule Communication** from the **Communications Toolbar.**
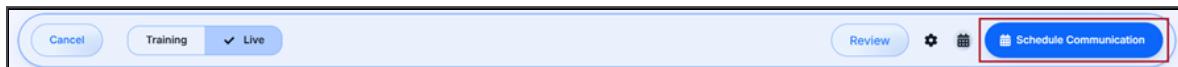
The newly-scheduled Communication will now appear in the **Scheduled Communications** list.
It will also be displayed in the **Communications List** with a **Calendar** icon to indicate that it's a Scheduled Communication.

Scheduled Communications List

All Scheduled Communications can be seen and managed from the list view on the **Scheduled Communications** page. The **Frequency** column displays the scheduling type (Recurring, One Time, or Fixed Interval), while the **Next Launch** column displays the next scheduled launch time. The **Calendar** icon next to the Communication name indicates that it's a Scheduled Communication, while Paused Communications are denoted with a **Pause** icon, and Ended Communications with a **Stop** icon.

Filtering, Sorting, and Searching Scheduled Communications

Users can apply a **Status** (Scheduled, Paused, or Ended) and/or **Start Date** filter to easily locate Scheduled Communications that meet the selected criteria.

Scheduled Communications can also be searched by **Name** and sorted by **Start Date** (Newest to Oldest, or vice versa).

Managing Scheduled Communications

Scheduled Communications can be managed from the **Scheduled Communications** page by hovering the cursor over a Communication and selecting an action to perform.

The following actions are available:

- **Delete** - Click the **Trashcan** button to delete the Scheduled Communication.
- **Pause** - Click the **Pause** button to temporarily prevent the Communication from being sent as scheduled. Click **Pause** again on the confirmation modal to proceed.
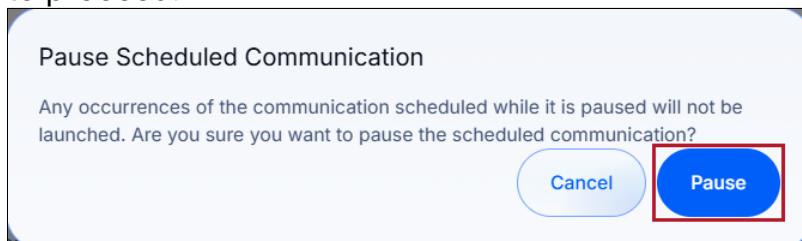
- **Edit Launch Schedule** - Click the **Edit** button to update the launch schedule, then click **Update Schedule** to confirm the changes.
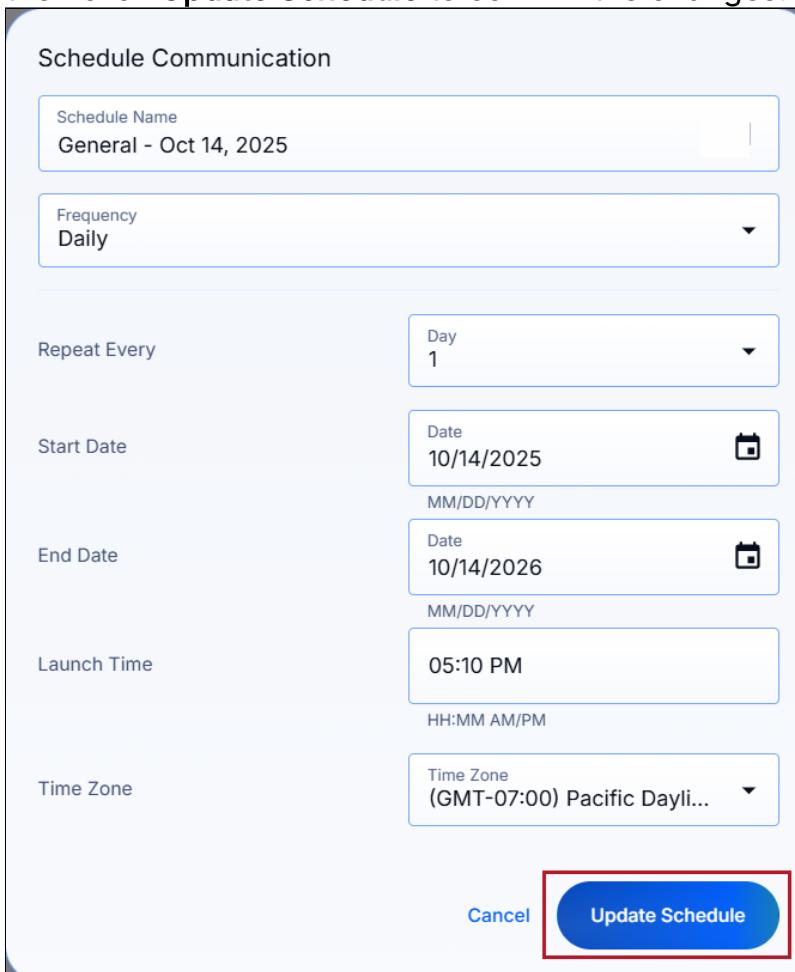
- **Update Scheduled Communication** - Click the **Update** button to make changes to the Communication itself, such as message content and settings, then click **Update Scheduled Communication.**
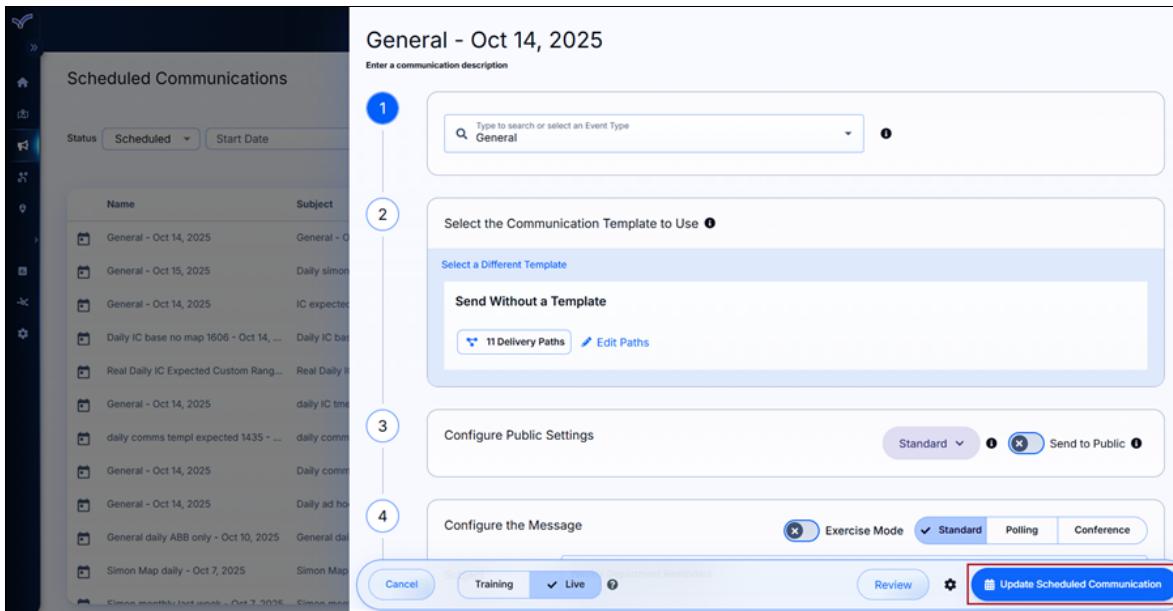
The modal will close, and a toast message will appear at the bottom of the **Scheduled Communications** page showing that the update was successfully applied.

Known Issues and Limitations

While Scheduling Communications provides great flexibility to message senders, note that the following functionality will be unavailable until a future release:

- Only initial Communications can be scheduled.
- Any updates to Scheduled Communications must be sent manually.
- Scheduled Communications may occasionally fail to send at the scheduled time due to unexpected backend issues (e.g., temporary database disconnects).
- For monthly recurring schedules spanning beyond one year, the next launch date displayed in the schedule list may be incorrect or misaligned.

Communication List

The **Communications List** page found under **Communications > Communication List** contains all messages sent via Communications (Notifications, Incidents, and Scenarios).

Click **Launch Communication** to start creating a Communication from scratch or a template. For more on that process, see [Launching a Communication from Everbridge 360](#).

NOTE: Communications are sent using Incident functionality, so all Communications will also be displayed under **Incidents – Open/History** with all functionality intact.

Communications from within the last 7 days are automatically displayed but can be expanded to include 14 days, 30 days, 60 days, or a specified date. You can also search for a Communication by its **Name**, while sorting can be done by **Name, Event Type, ID, Send Time**, and **Created By**.

Communications accompanied by the textbook icon were launched in Training Mode.

Communication Details

Clicking on the name of the Communication will take you to the <u>Communication Details</u> page, where you can see details of responses, export the results as a PDF, close the Communication, and more.

Communication Details

The **Communication Details** page displays any relevant information about a launched Communication, such as confirmation status, message details, confirmation by delivery paths, settings, and more. It's also where operators can send updates to recipients, activate a closed Communication, export the Communication details, or close the Communication.

Sending a Communication Update

Situations that require a Communication are often in flux and can rapidly change at any time, so sending a status update is a useful way to keep recipients informed of the latest activity surrounding a Communication.

Updates can only be sent for Active Communications. To send an update from the Communication Details page:

1. Click the **Update** icon on the message in the **Activity** column to the left.
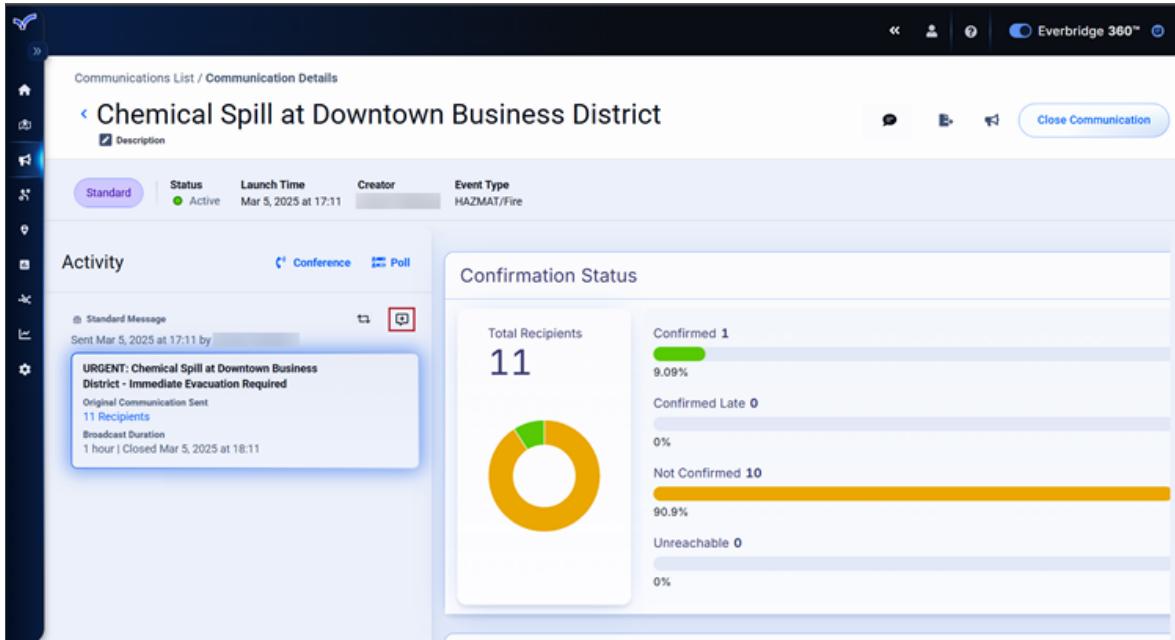
2. The Select Recipients modal opens, allowing the sender to choose one of two options:

- **Existing Recipients** - Send an update to all recipients in the thread, or choose to send to those who have or have not confirmed the message.
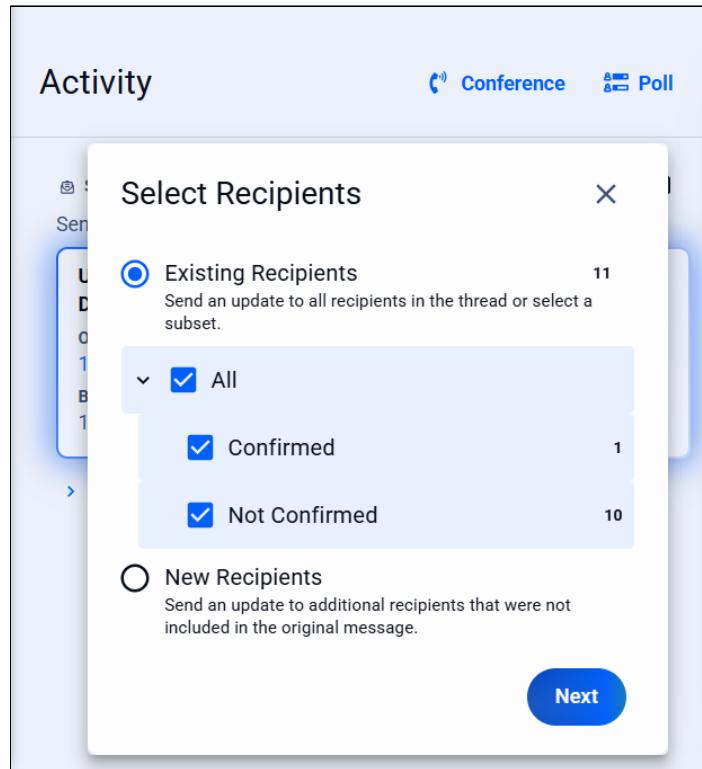
- To see which recipients have confirmed, click the Recipients link and then apply the **Confirmed** or **Not Confirmed** filters on the **Confirmation Details** page.
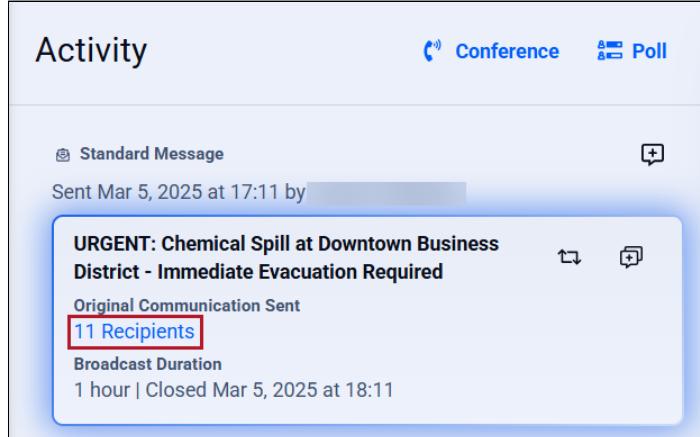
- **New Recipients** - Send an update to additional recipients that were not included in the original message. The sender will prompted to add the new recipients the **Send Update to Message** form.
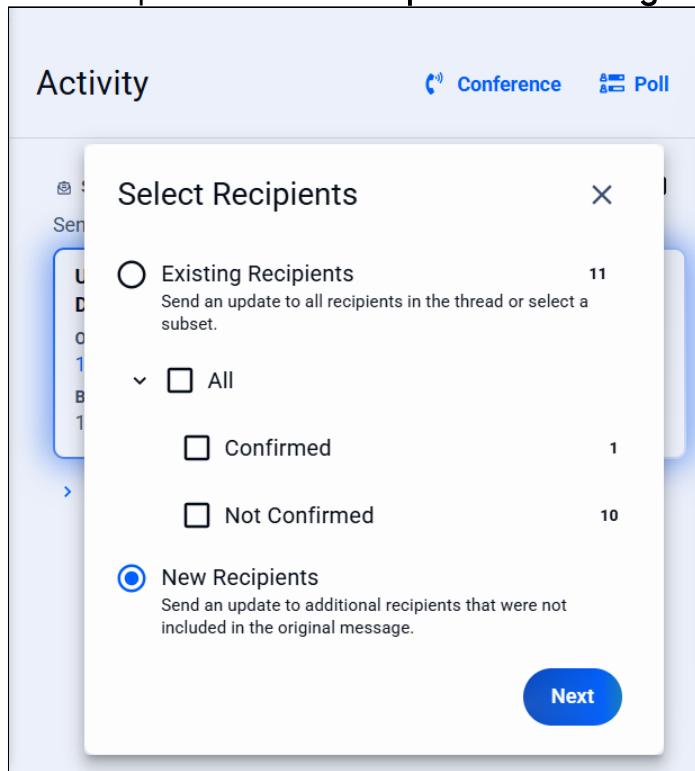
3. The **Send Update to Message** form opens. Set the Event Type (if different from the original message) and select a template for the update or use the **Send Without a Template** option. Using a template will auto-fill key details for this message, such as delivery paths, public settings, message body, and attachments.
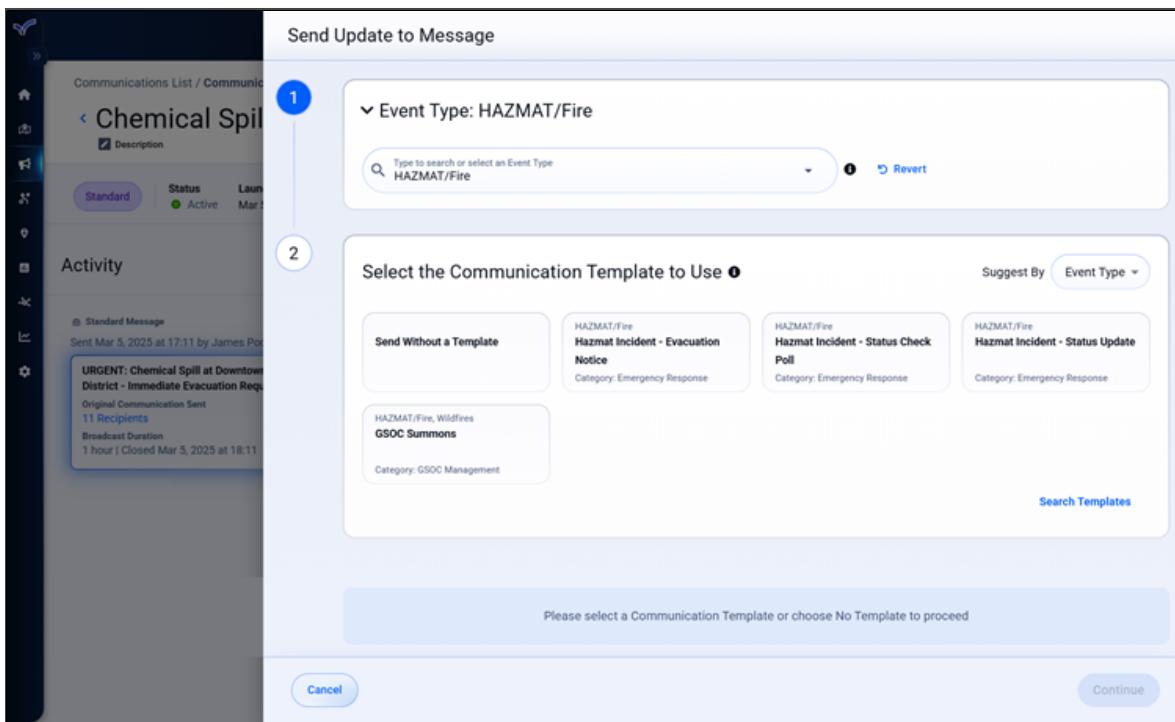
4. Edit the delivery paths as needed and click **Save**.
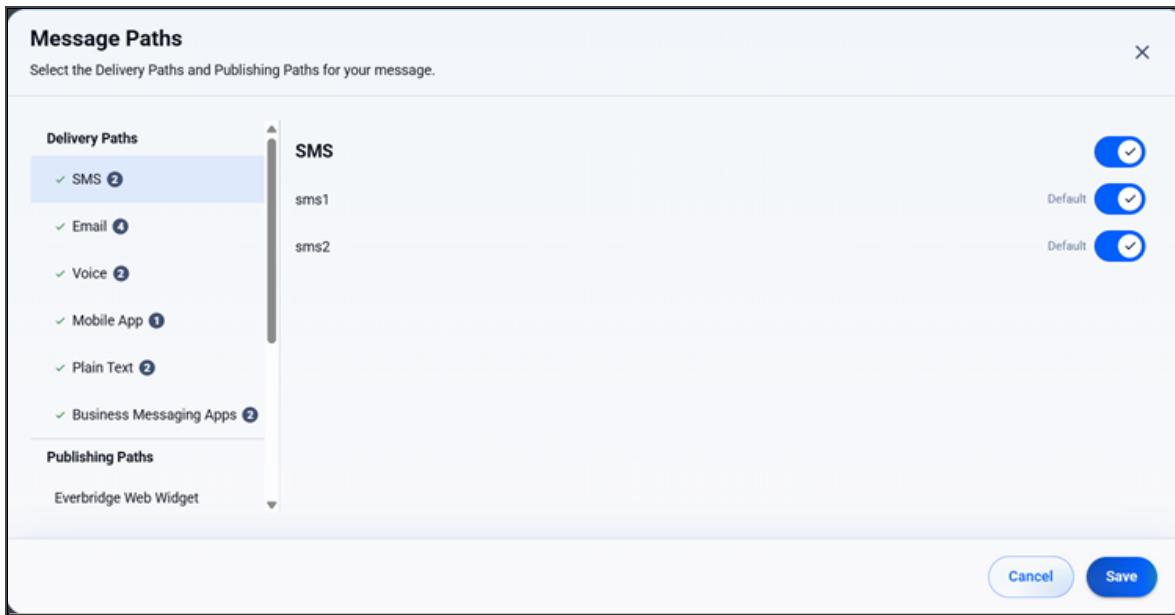
5. Configure the **Public Settings** section to specify the priority.
6. Choose between either a Standard, Polling or Conference Communication and enter a subject.
7. Enter a default message and as many Custom Messages per delivery path as desired. Click **Add** at the bottom of the section to include attachments.
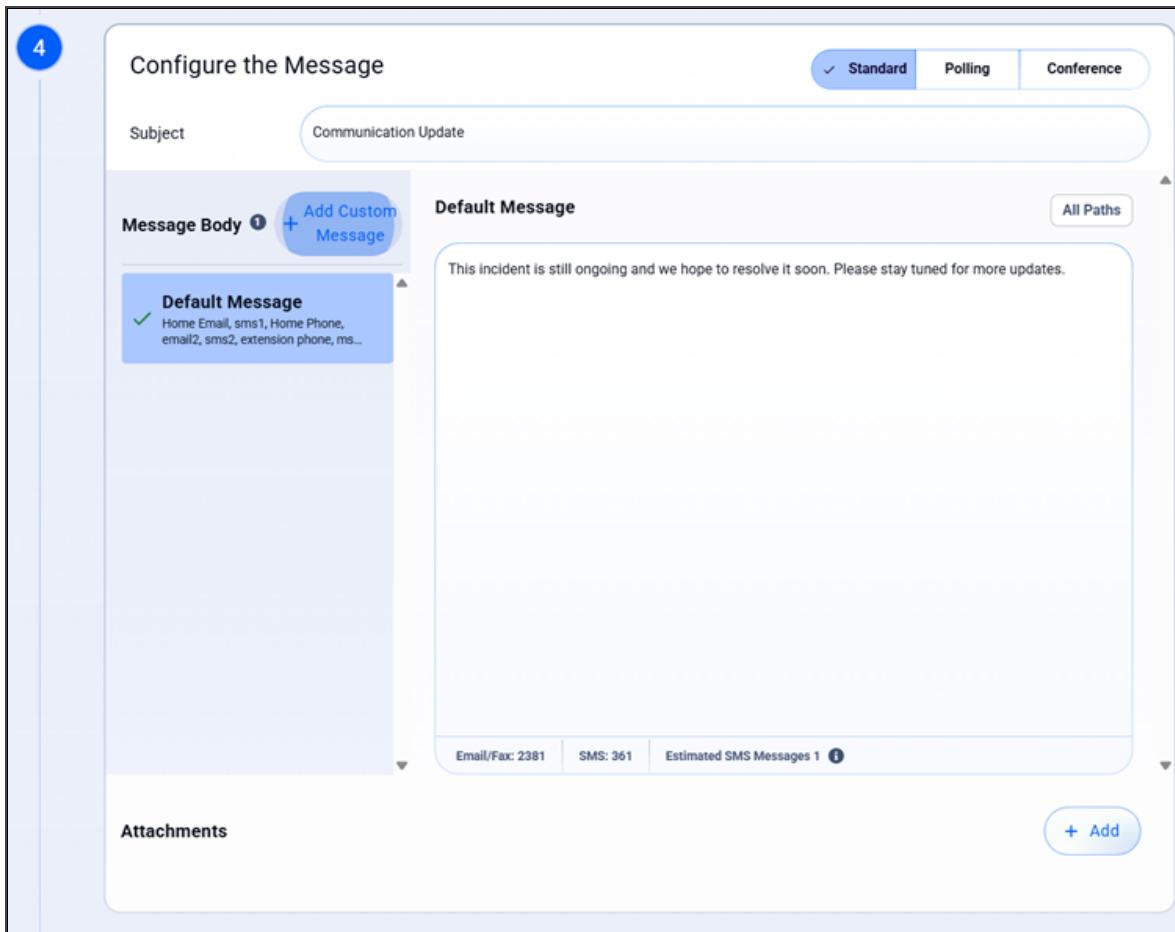
- Note that the ability for operators to modify the message body is permissions-based. If you're unable to edit the body, contact your administrators for assistance.

8. Select the recipients as you would a normal Communication via individuals, groups or rules. Note that currently, selecting a template does not automatically apply its recipient selections, though that functionality is coming soon.

9. Click **Continue**. The **Launching Communication** modal will appear and preview the number of recipients who will receive the message. If needed, click **Stop Launch** to go back and make adjustments, or click **Launch Immediately**.
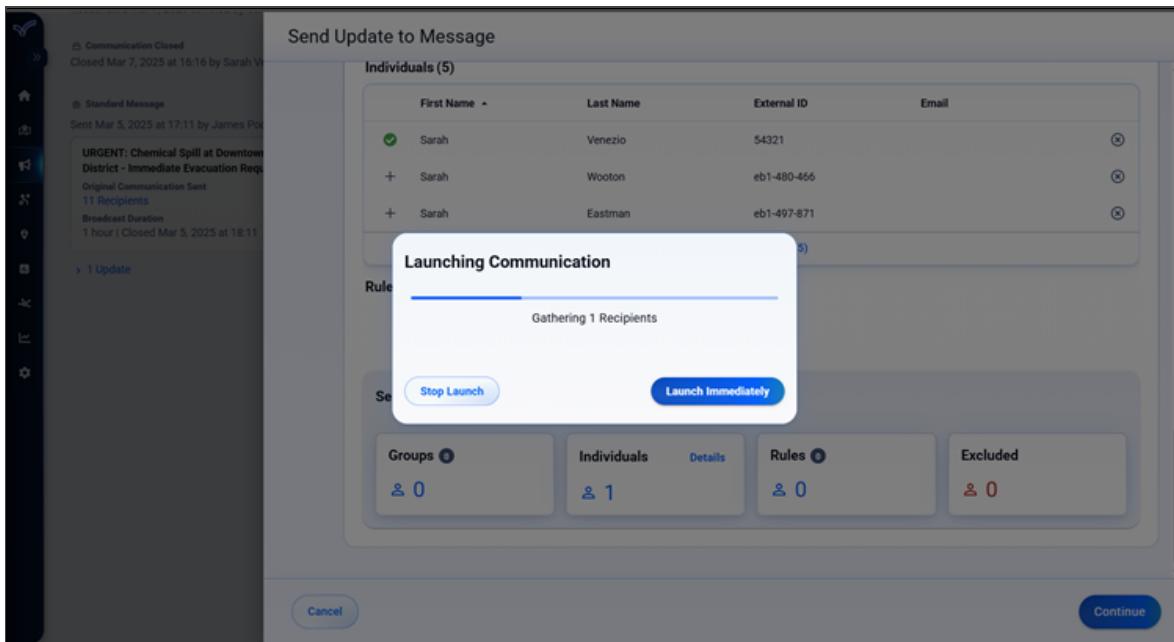
10. Once launched, the update can be seen in the **Activity** panel nested beneath its parent Communication, along with any other updates sent for it. The newly-launched update will automatically be selected from the Activity panel upon launch, and the **Confirmation Status** modal to the right will display the confirmation status of the recipients.
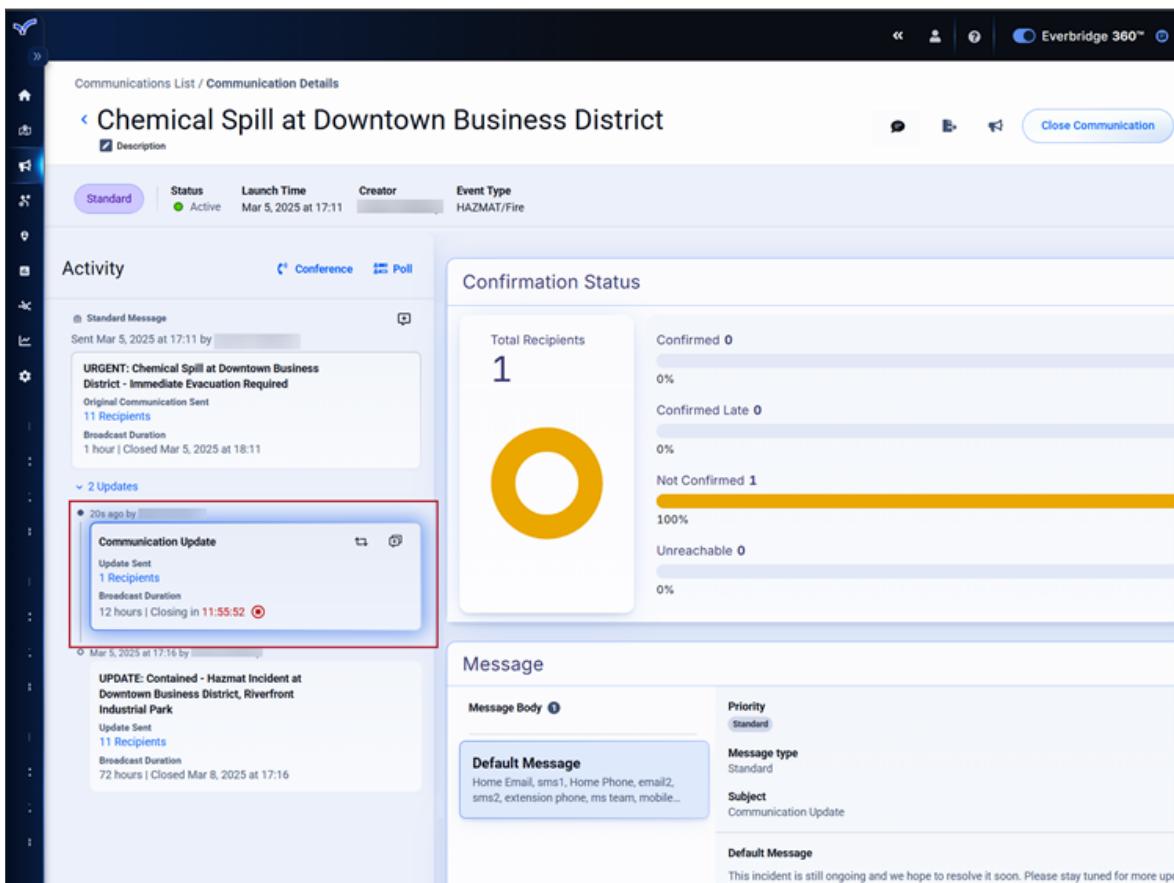
○ The selected Communication card in the **Activity** panel will be highlighted in blue for easy recognition.

Closing a Communication

There are two ways to close a Communication from the **Communication Details page**: either with or without a message alerting the recipients of the closure.

Closing a Communication Without a Message

To close a Communication without sending a message:

1. Navigate to the **Communication Details** page of an Active Communication.
2. Click **Close Communication** in the top-right corner.
3. The Close Communication modal will open. Click **Close Now**.
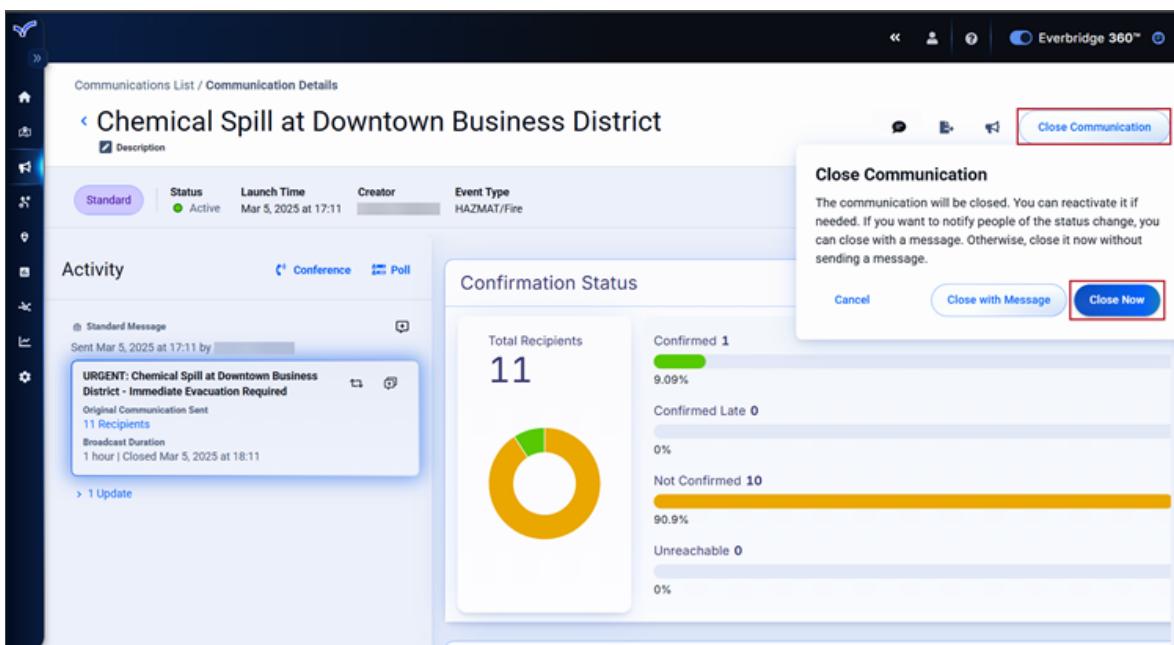
This option will:

- Close the Communication immediately.
- Disable the ability to send further Communications in this thread.
- Disable the ability to send updates.
- Disable the ability to resend any messages from this Communication.

4. A message will appear confirming that the Communication has been closed. The status will change to Closed, and a timestamp in the **Activity** section will also show how long ago it was closed and by whom. The **Activate Communication** button will also appear in the top-right corner.
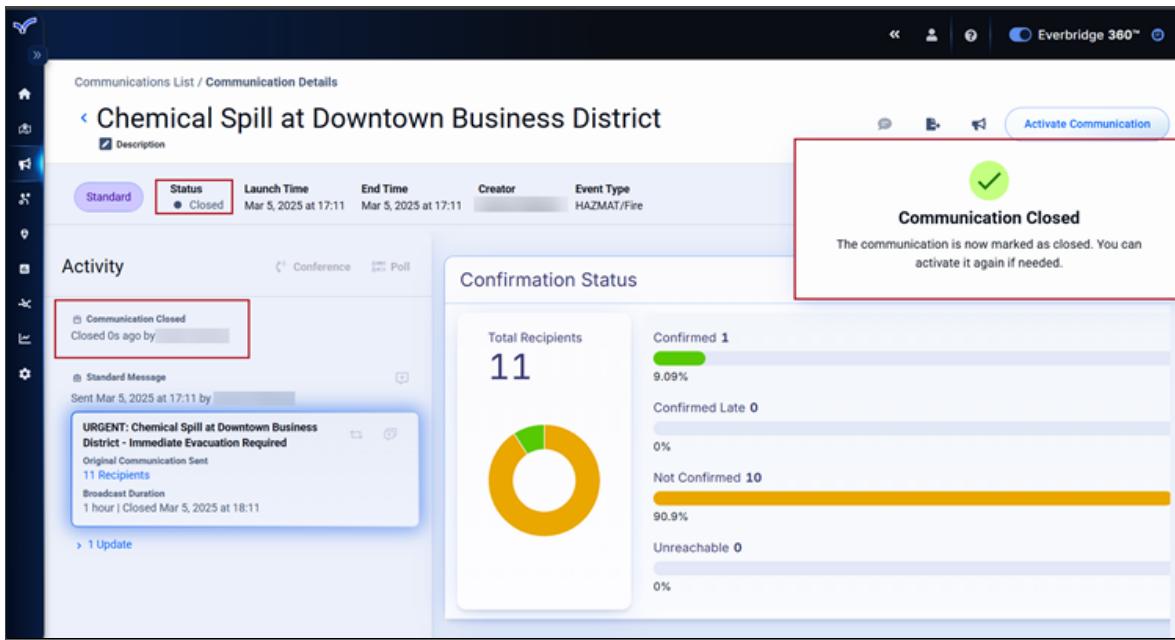
Closing a Communication with a Message

To send a message when closing a Communication:
1. Navigate to the **Communication Details** page of an Active Communication.
2. Click **Close Communication** in the top-right corner.
3. The Close Communication modal will open. Click **Close with Message**.
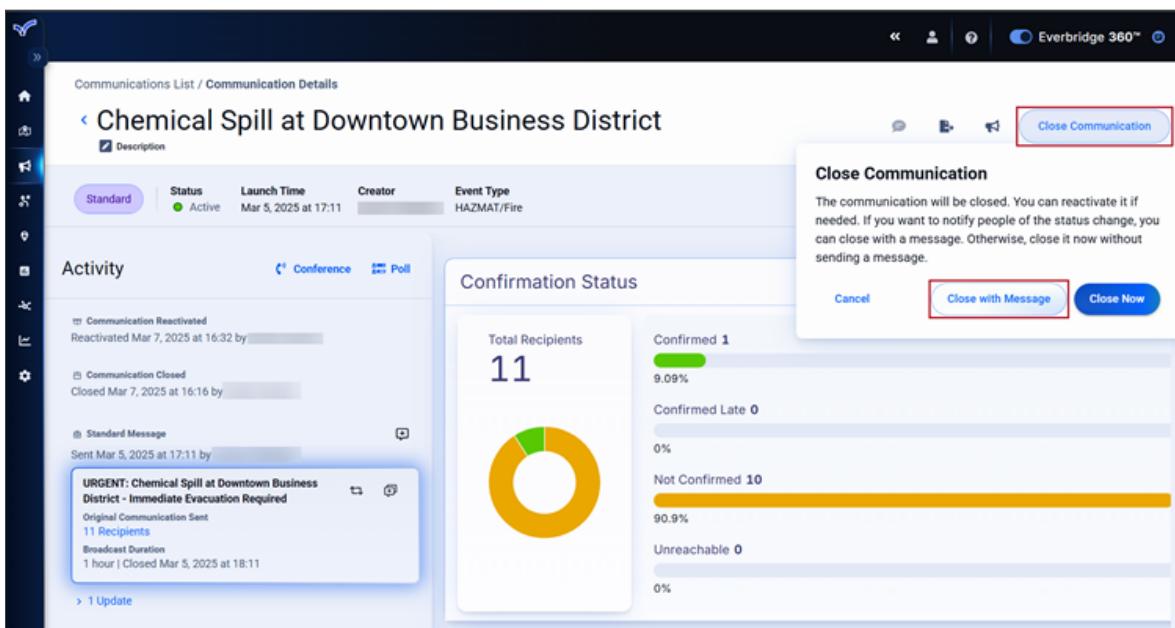
Note that after the final message is sent, this will:
- Disable the ability to send further Communications in this thread.
- Disable the ability to send updates.

- Disable the ability to resend any messages from this Communication.
4. The **Send Update to Message** form will appear to the right. Choose a Communication template to use for the message or select **Send Without a Template** to send an ad-hoc message. Templates will first be suggested by Event Type but suggestions can also be viewed by Most Recently Used or Most Recently Updated templates.
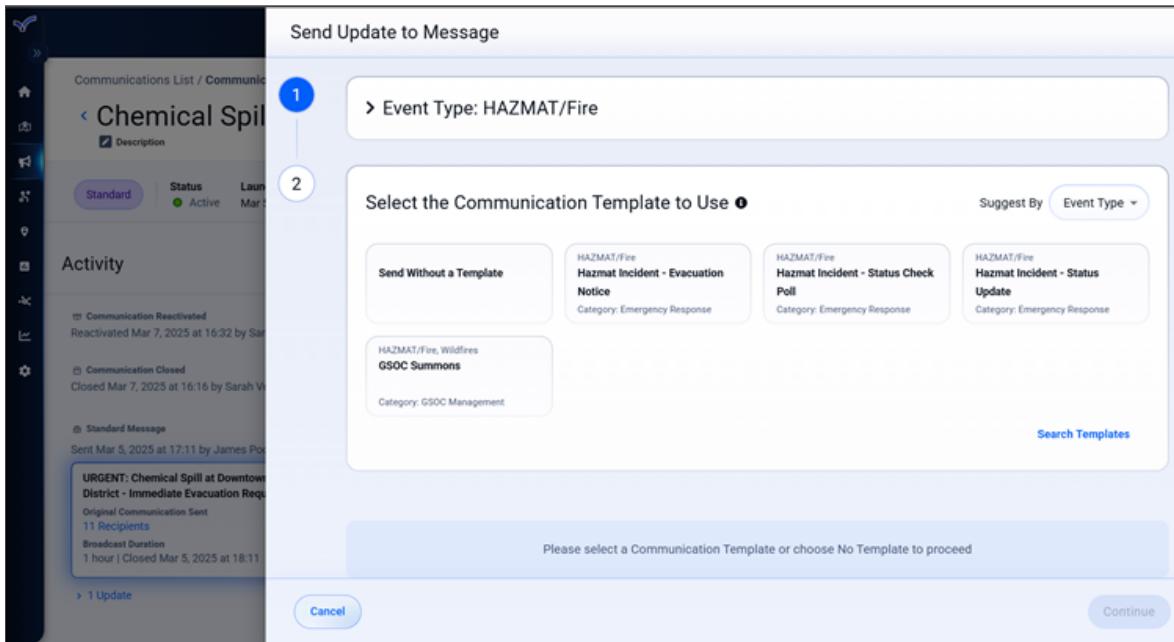
5. Configure the delivery paths, public settings, and message the same you would when launching a new Communication.
6. Click **Continue**. The launch preview will display the number of recipients who will be receiving this message, allowing the operator to cancel and adjust as needed. If it looks correct, either wait for the launch to complete on its own or click **Launch Immediately**.
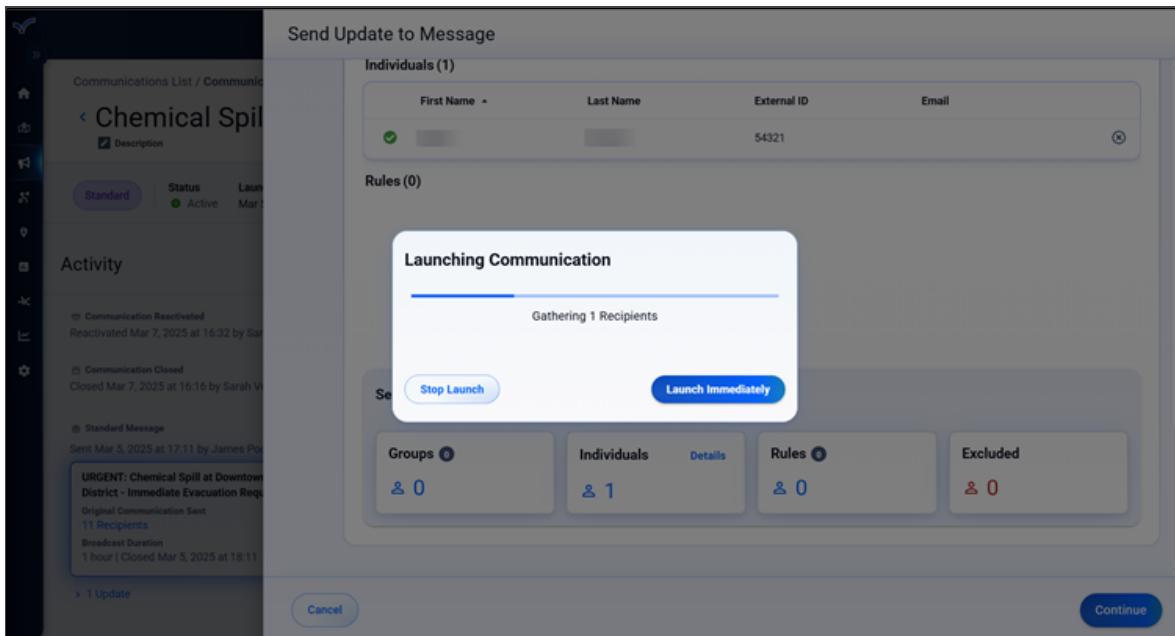
7. Once the message has been launched, the **Activity** panel will update showing that the original Communication has been closed and that a message was sent to the specified recipients. The **Status** will also change to **Closed**.
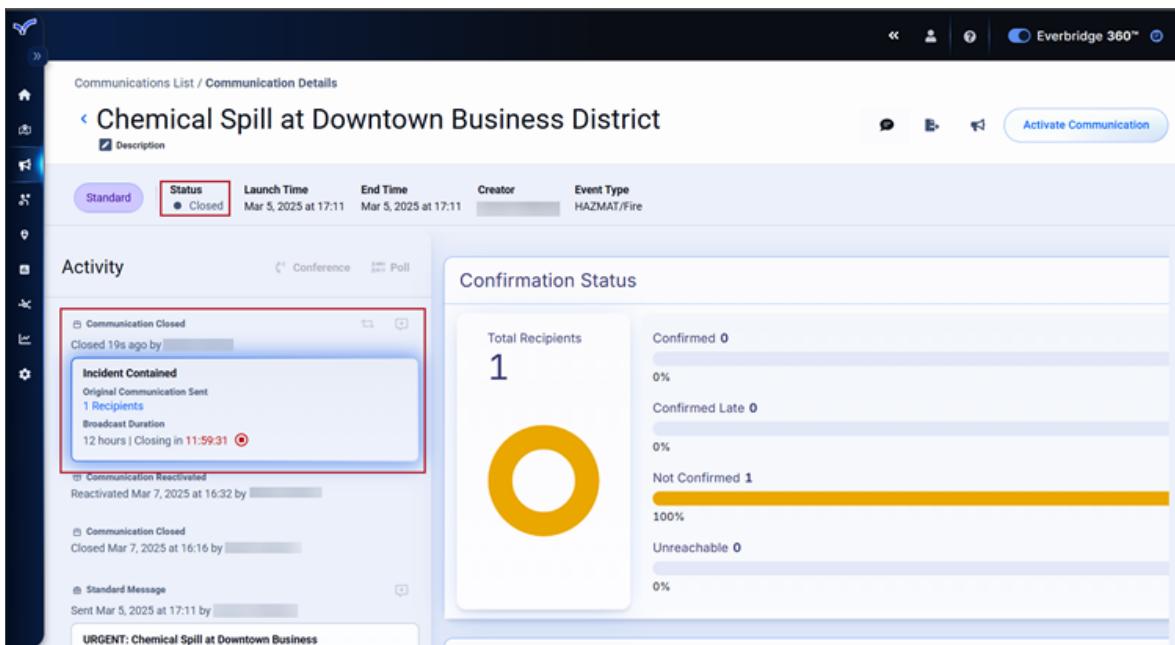
Activate Communication

If needed, Communications that have been closed can be reopened again from the **Communication Details** page. To do this:

1. Navigate to the closed Communication's Details page.
2. Click **Activate Communication** in the top-right corner.
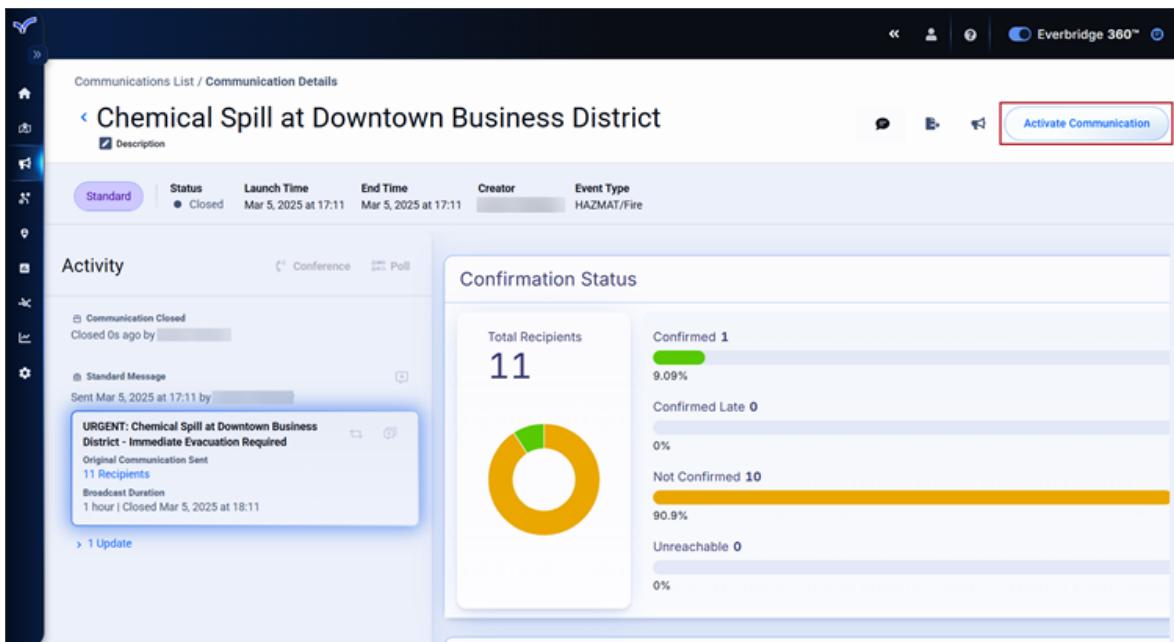
3. A message will appear stating that the Communication will be activated. Click **Activate** again to confirm.
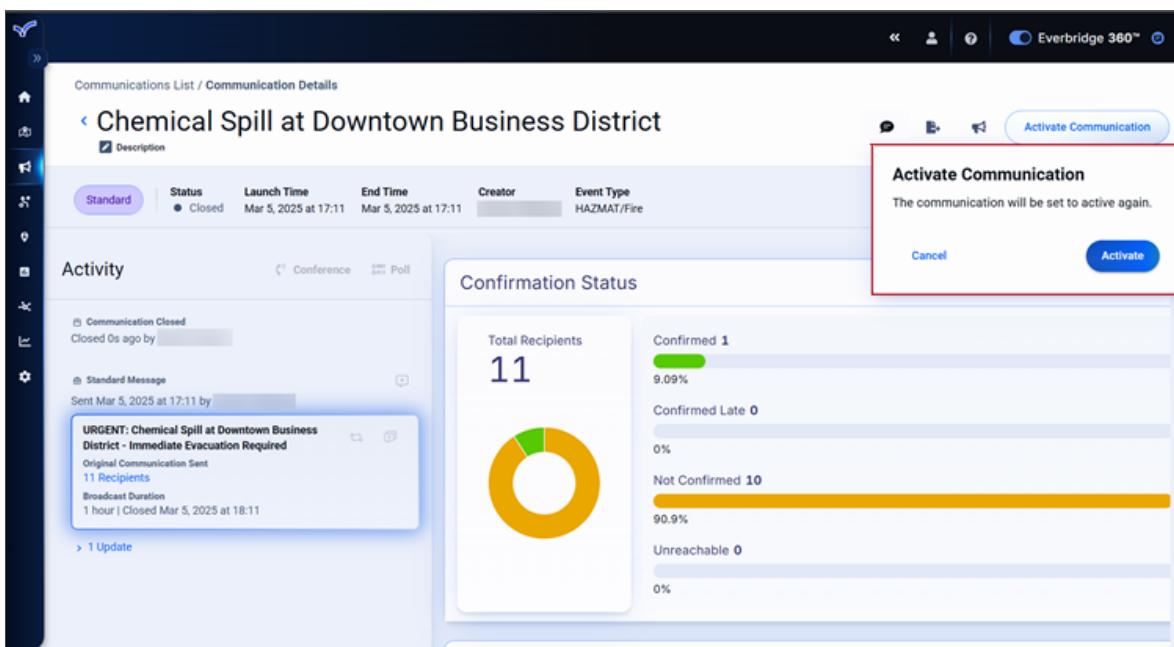
4. The Communication's status will change to Active, and the reactivation timestamp will appear in the **Activity** panel, including the name of the user who closed and reopened it.
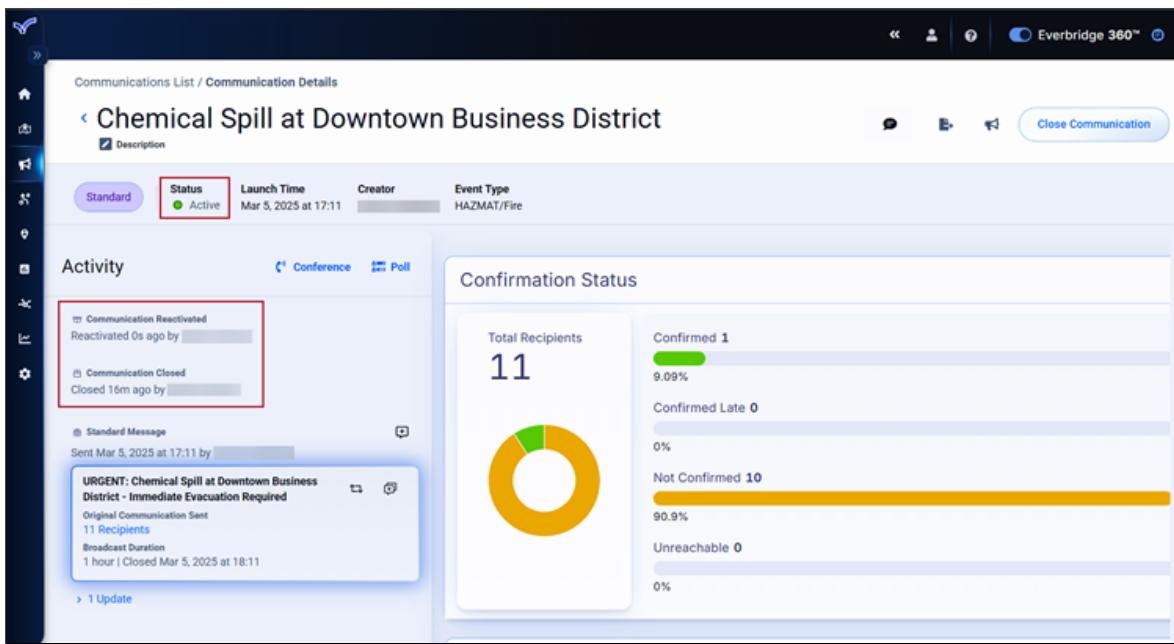
Launch New Communication

A new, unrelated Communication can be sent from the **Communication Details** page by clicking the megaphone at the top.
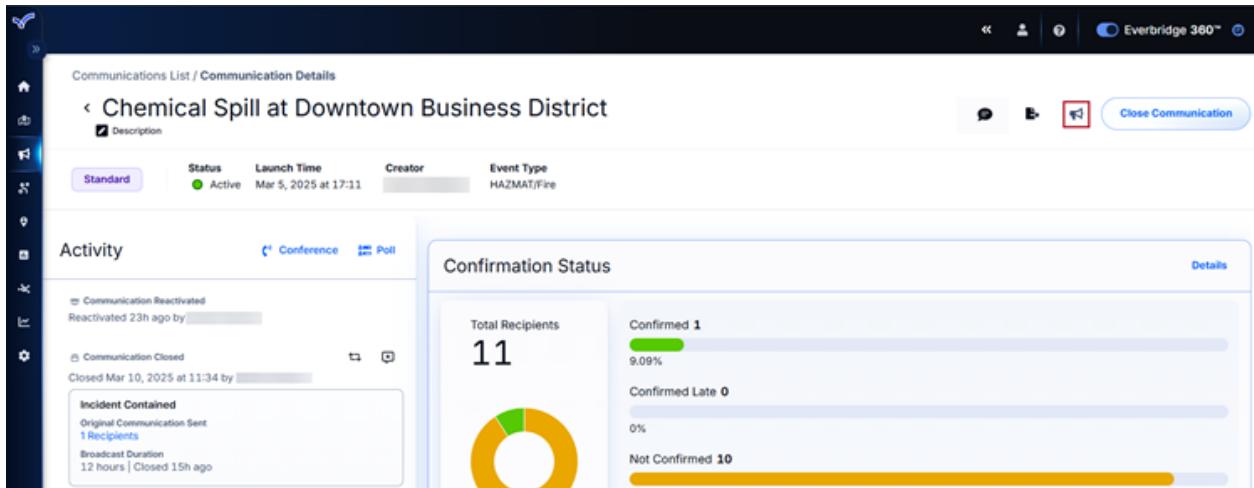
Doing so will open the **Launch Communication** page. Fill the form as you would using the instructions outlined in Launching a Communication from Everbridge

[360](#).
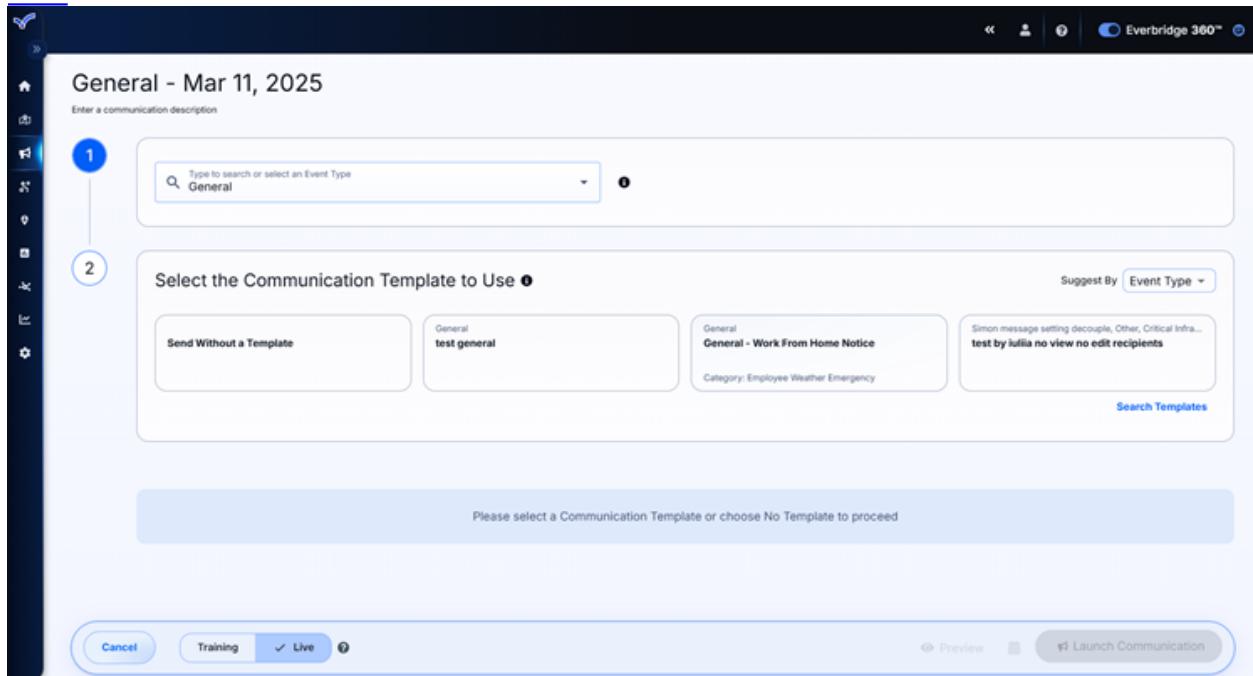
NOTE: Launching a new Communication from the **Details** page of an existing one will not create a Communication linked to it, such as an update. It creates a brand new Communication with its own **Details** page and dashboard.

Widgets

The following widgets offer additional insight from the Communication Details dashboard:

- Confirmation Status
- Confirmation by Delivery Path
- Recipients
- Communication Settings
- Communication Summary

Confirmation Status Widget

The **Confirmation Status** widget allows users to view, filter, and interact with detailed recipient confirmation data, enabling them to monitor communication effectiveness and take follow-up actions. The statuses in the graphic are color-coded for easy identification:

- **Confirmed** - Green

- **Confirmed Late** - Purple
- **Not Confirmed** - Orange
- **Unreachable** - Black

Click **Details** to see more information.
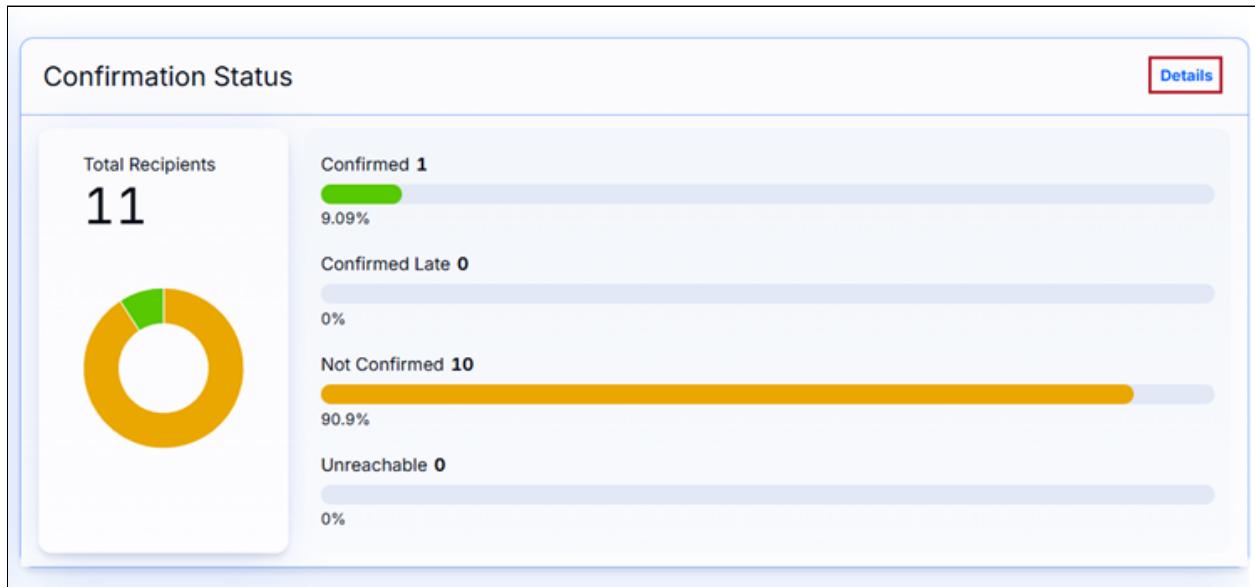
The **Confirmation Details** page will open, which displays status cards to the left:

- Total Recipients
- Confirmed
- Confirmed Late
- Not Confirmed
- Unreachable

Each status card will display the percentage of applicable responses against the total possible. Clicking a status card will highlight it in blue and open the list of recipients that match that status. Doing so will also change the **Confirmation Status** filter at the top of the page. Results can be distilled further by applying the **Delivery Path** filter, and recipients can also be searched by name.

Polling Communications can also utilize the **Poll Response** filter to display recipients who submitted a specific response. The available filters are determined by the polling responses included in the Communication.


While the status cards automatically update as new responses come in, note that the recipient table does not. It needs to be manually refreshed by clicking the **Refresh** button.

Updates can be sent using the applied filters by clicking **Send Update.**

For example, users can choose to send an update to only those recipients who haven't confirmed by first applying the **Not Confirmed** status filter before starting the update form. Doing this will automatically select the unconfirmed recipients in the update.
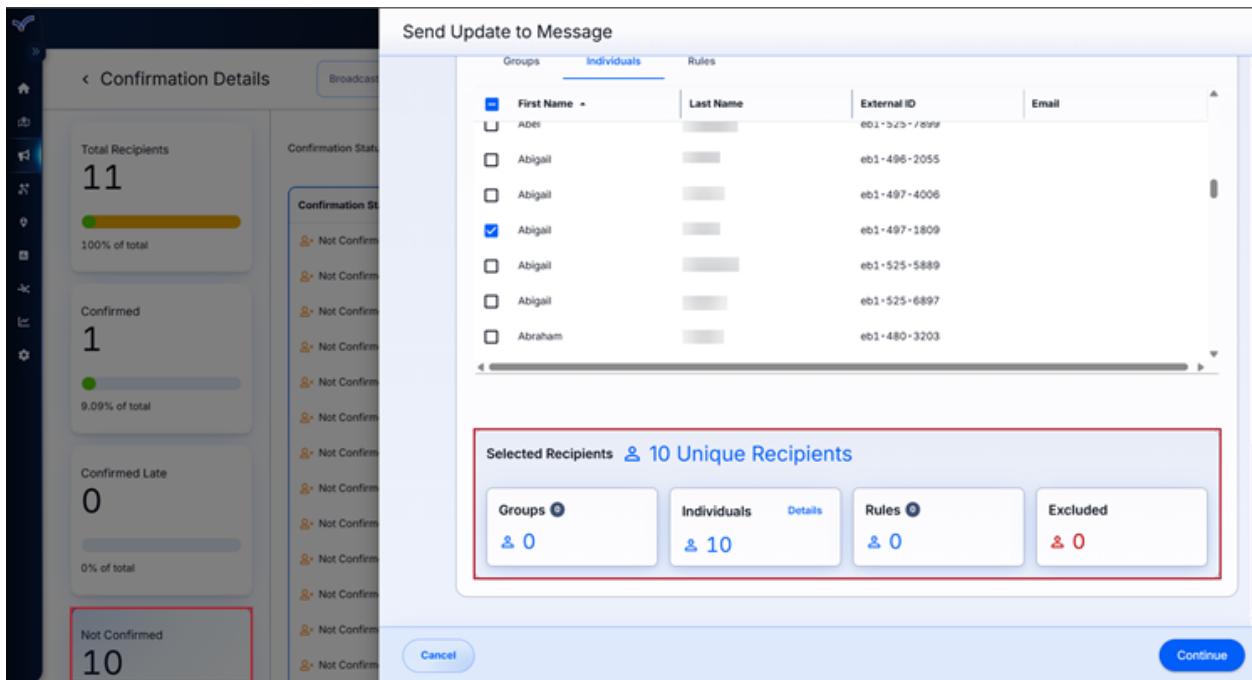
See [Sending a Communication Update](#) for more details.

Confirmation by Delivery Path Widget

The **Confirmation by Delivery Path** widget allows users to view, filter, and interact with detailed recipient confirmation data by delivery path, enabling them to monitor communication effectiveness and take follow-up actions.

Click **Details** to see more information.
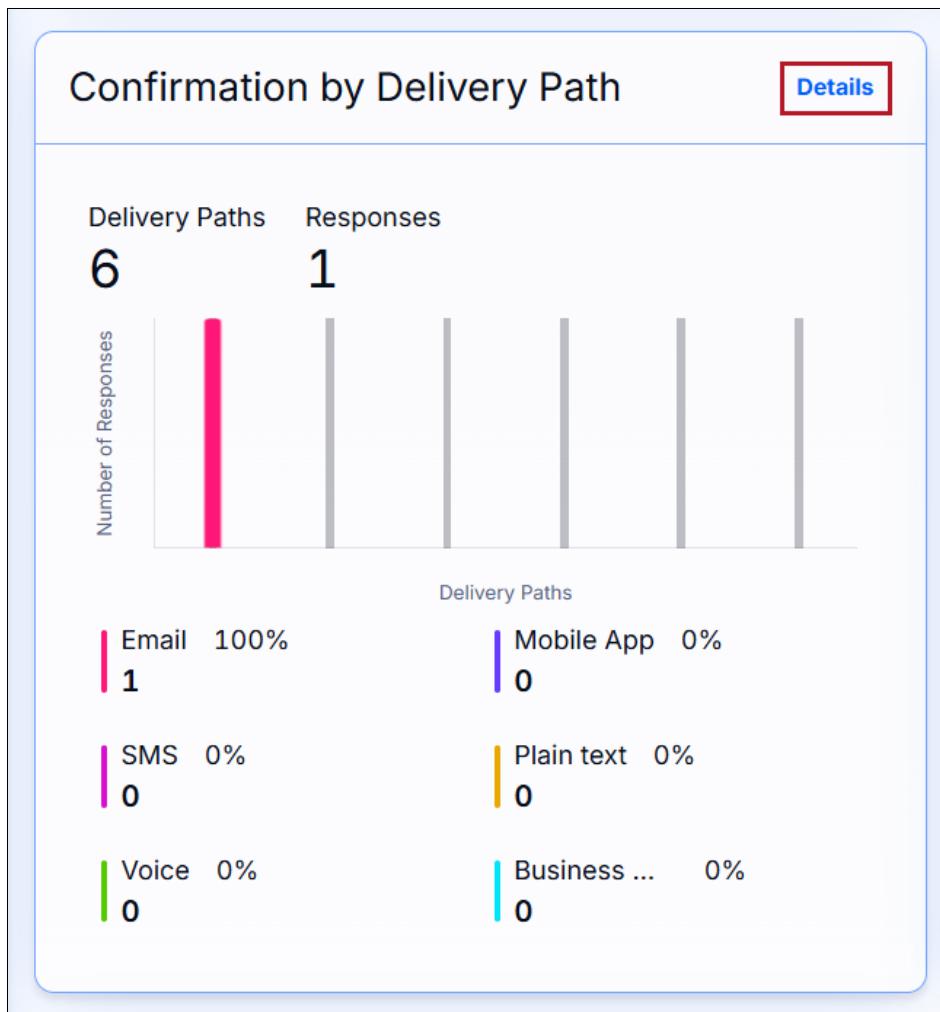
The **Confirmation by Delivery Path** page will open, which displays the color-coded delivery path cards to the left:

- All
- **Email** - Red
- **Mobile App** - Purple
- **SMS** - Pink
- **Plain Text** - Orange
- **Voice** - Green
- **Business Apps** - Blue

Each delivery method card will display the percentage of applicable responses for that method against the total possible. Clicking a card will highlight it in blue and open the list of recipients that match that delivery path. Doing so will also change the **Delivery Path** filter at the top of the page. Click the card again to remove the applied filter. Recipients can also be searched by name from this page.

Polling Communications can also utilize the **Poll Response** filter to display recipients who submitted a specific response. The available filters are determined by the polling responses included in the Communication.

While the status cards automatically update as new responses come in, note that the recipient table does not. It needs to be manually refreshed by clicking the **Refresh** button.

Updates can be sent using the applied filters by clicking **Send Update**.

For example, users can choose to send an update to only those responders using the email delivery path before starting the update form. Doing this will automatically select the desired recipients in the update.
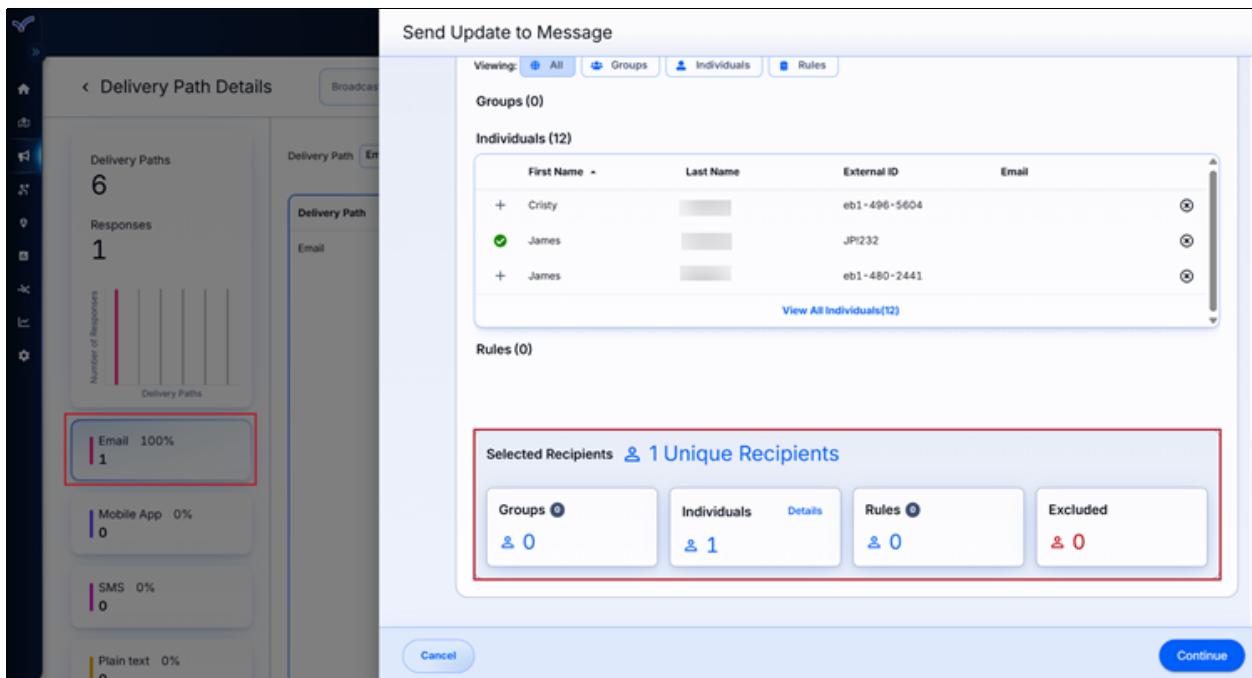
See [Sending a Communication Update](#) for more details.

Recipients Widget

The **Recipients Widget** allows users to view, filter, and interact with recipient information by groups, individuals, rules, or recipients in the area, enabling them to monitor communication effectiveness and take follow-up actions.

Click **Details** to see more information.
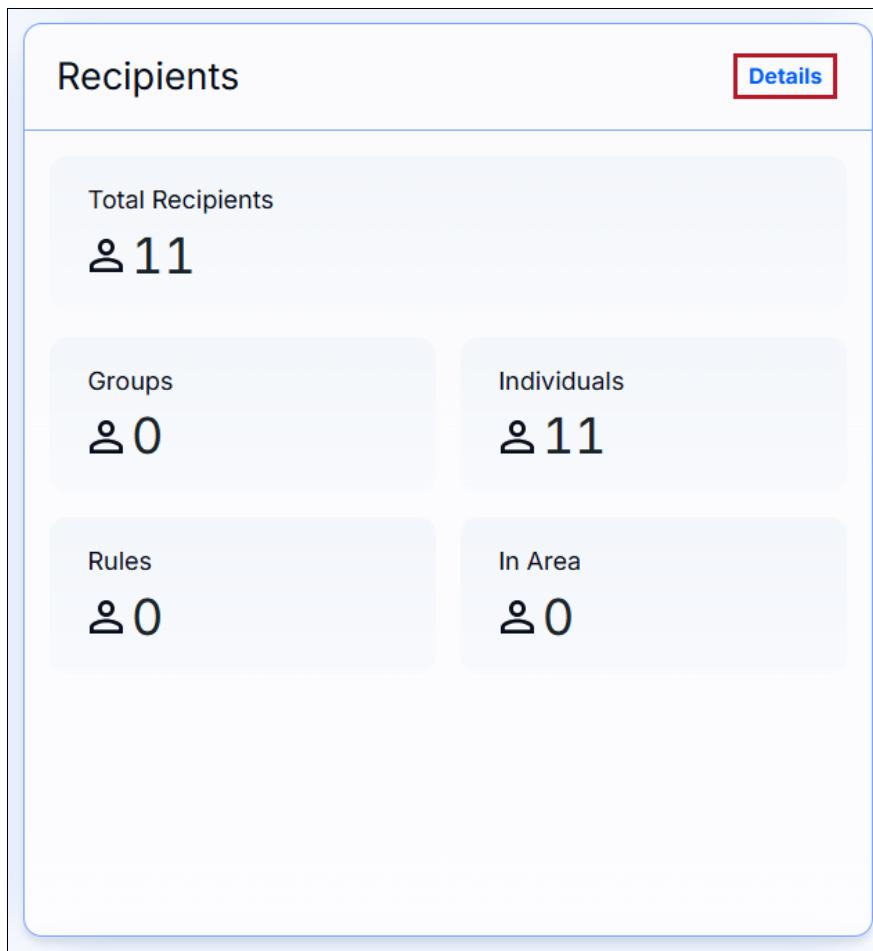
The **Recipient Details** page will open, which displays the recipient selection method cards to the left:

- Total Recipients
- Groups
- Individuals
- Rules
- In Area

Each recipient selection card will display the percentage of applicable responses per selection method against the total possible. Clicking a card will highlight it in blue and open the list of recipients that match that selection method. Doing so will also change the **Recipients** filter at the top of the page. Click the card again to remove the applied filter. Recipients can also be searched by name from this page, and the list can be refined further by applying a **Confirmation Status** filter from the top.

Polling Communications can also utilize the **Poll Response** filter to display recipients who submitted a specific response. The available filters are determined by the polling responses included in the Communication.

While the status cards automatically update as new responses come in, note that the recipient table does not. It needs to be manually refreshed by clicking the **Refresh** button.

Updates can be sent using the applied filters by clicking **Send Update.**

For example, users can choose to send an update to only recipients who were selected as Individuals before starting the update form. Doing this will automatically select the desired recipients in the update.

See Sending a Communication Update for more details.

Communication Settings Widget

The **Communication Settings Widget** displays critical information about the Communication's settings and configurations. It's broken into four tabs that can be viewed by being clicked on:

- **Delivery** - Includes the following delivery settings:
  - Delivery Path Order
  - Delivery Paths
  - Wait Between Delivery Paths
  - Override Quiet Time Settings
  - Contact Cycles
  - Wait Between Cycles
  - Broadcast Duration
  - Apply Voice Delivery Throttling Rules

- **Content** - Displays the chosen language for the Communication.
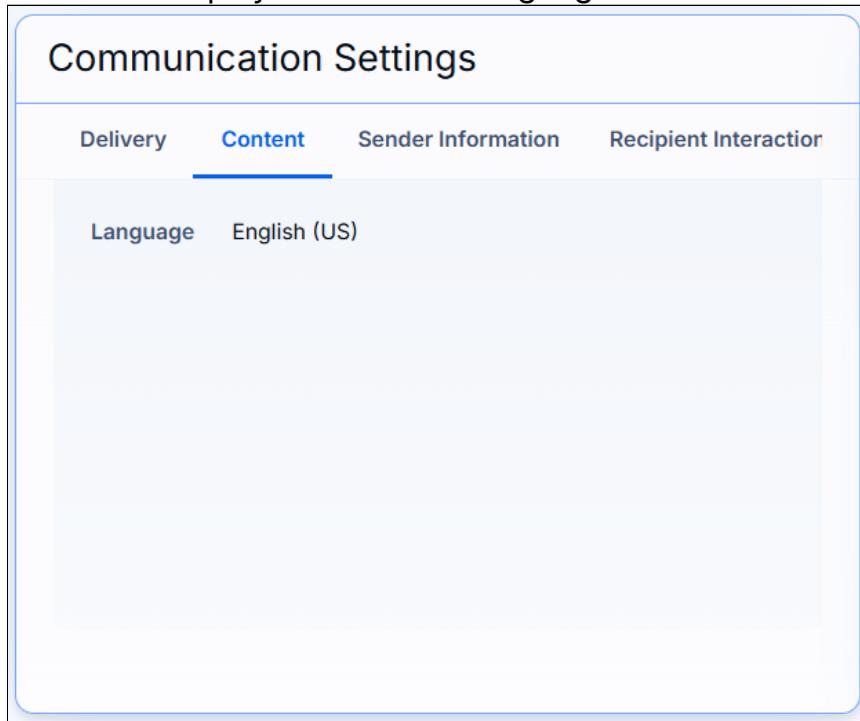
- **Sender Information** – Displays details about the Communication sender, including:
  - Email Sender Name
  - Reply to Email
  - Caller ID

◦ SMS ID

Communication Settings

Delivery	Content	Sender Information	Recipient Interaction

Email Sender Name   Paul ▮▮▮▮▮

Reply To Email   ▮▮▮▮▮▮▮▮▮▮▮

Caller ID
- United States: ▮▮▮▮▮
- United Kingdom: ▮▮▮▮▮
- Canada: ▮▮▮▮▮
- South Africa: ▮▮▮▮▮

SMS ID
- Other countries: Everbridge Numeric S MS ID
- United Kingdom: ▮▮▮
- China: ▮▮▮
- Albania: ▮▮
- Hong Kong: ▮▮▮▮

- **Recipient Interaction** - Displays the settings specific to recipient interaction, including:
  - ◦ Request Confirmation
  - ◦ Everbridge Mobile App
    - ▪ Request Location
    - ▪ Request Image
    - ▪ Request Additional Information
    - ▪ Enable Sharing

◦ Voicemail Handling

Communication Summary Widget

The **Communication Summary Widget** displays basic but crucial details about the Communication, such as:

- **Communication ID** - The Communication's unique identifier.
- **Event Type** - The Event Type that was selected when launching this Communication.
- **Name** - The Communication's name.
- **Notification Mode** - Whether this was sent as a Live Communication or Training.
- **Sender** - Name of the sender and the launch timestamp.
- **Recipients** - Number of contacts that this Communication was sent to.

- **Launched From** - What platform was used to launch the Communication (Manager Portal Web, etc.).

Communication Summary

Communication ID	ccdd79a8-2342-4bf1-94d7-aa2e1698cecc
Event Type	HAZMAT/Fire
Name	Chemical Spill at Downtown Business District
Notification Mode	Live
Sender	James ▓▓▓▓▓▓ 05 Mar 2025 at 17:11:17 PST
Recipients	11
Launched From	Manager Portal Web

Exports

There are four different types of exports that can be initiated from the Communication Details page:

- Communication Details Export
- Confirmation Status by Recipient Export
- Confirmation by Delivery Path Export
- Recipients Export

Communication Details Export

The Communication Details Export allows users to download the Communication Details page as a PDF, including:

- Confirmation Status
- Message
- Confirmation by Delivery Path
- Recipients
- Communication Settings
- Communication Summary

To download this export:

1. Navigate to the **Communication Details** page.
2. Click the **Export to PDF** button. The PDF download will appear at the top of the browser.

3. Click the download to open and review the PDF.

Confirmation Status by Recipient Export

The **Confirmation Status by Recipient Export** is a CSV report displaying the following items (when applicable):

- Name

- External ID
- Added As
- Confirmation Status
- Confirmed Time
- Delivery Path
- Delivery Path Value
- Poll Response

To initiate this export:

1. Navigate to the **Communication Details** page.
2. Click **Details** on the **Confirmation Status** widget.
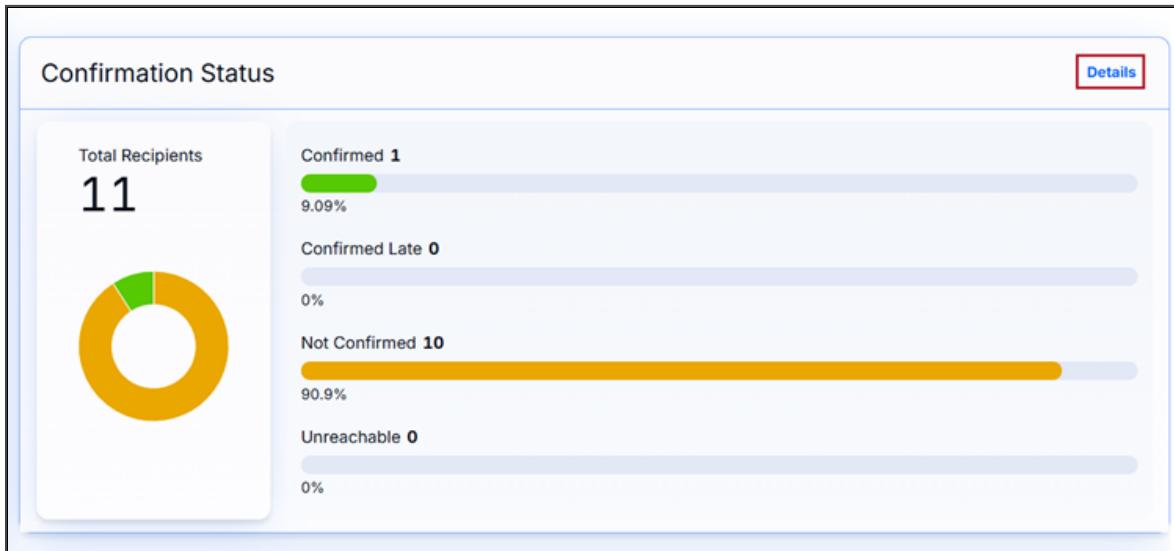
3. The **Confirmation Details** page will appear. Click the **Export Confirmation Details by Recipient** button to generate the CSV.

4. Click the download to open and view the export.

Confirmation by Delivery Path Export

The **Confirmation by Delivery Path Export** is a CSV report that offers insight on the following items:

- Name
- External ID
- Added As
- Confirmation Status
- Attempted Time
- Delivery Path
- Delivery Path Value
- Result
- Confirmed Time
- Poll Response

To download this report:

1. Navigate to the **Communication Details** page.

2. Click **Details** on the **Confirmation by Delivery Path** widget.
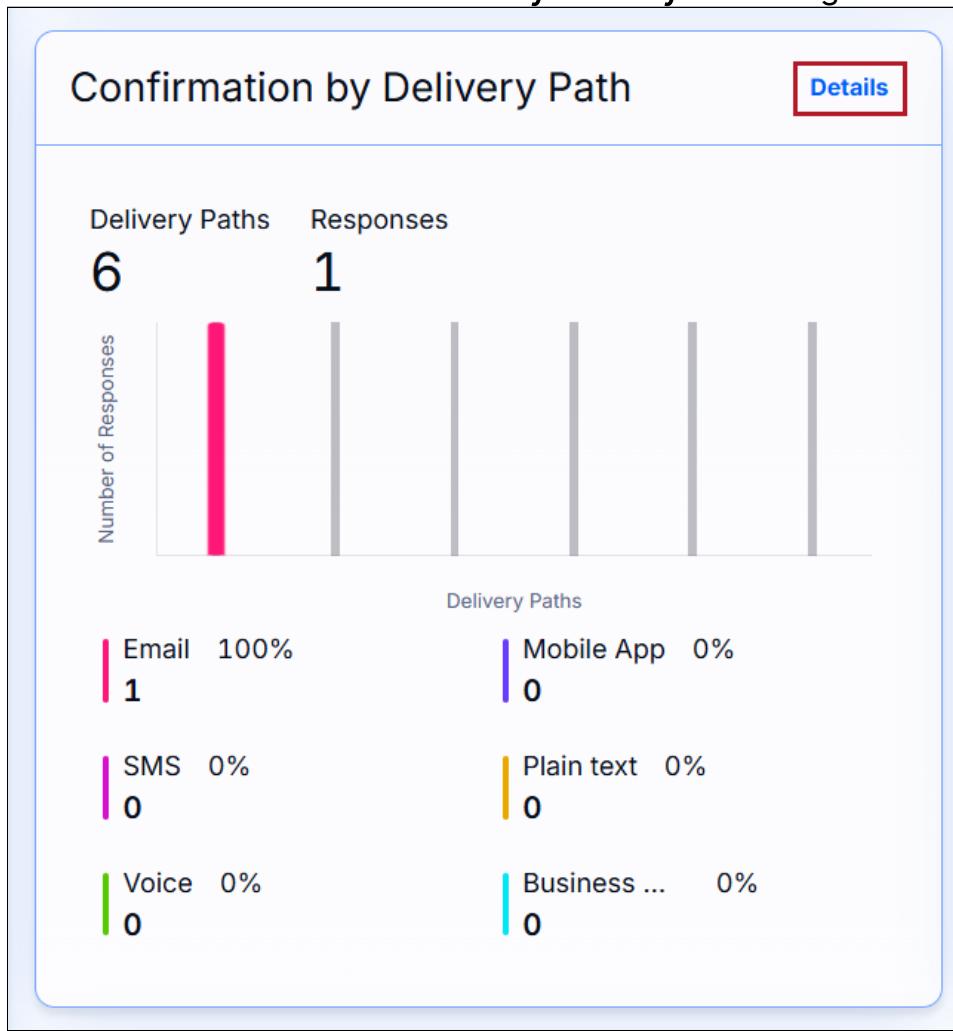
3. The **Delivery Path Details** page opens. Click the **Export Delivery Path Details** button to generate the download.


4. Click the download to open and view the export.

Recipients Export

The **Recipients Export** is a CSV report displaying the following items (when applicable):

- Name
- External ID
- Added As
- Confirmation Status
- Confirmed Time
- Delivery Path
- Delivery Path Value
- Poll Response
- Address

To download this report:

1. Navigate to the **Communication Details** page.

2. Click **Details** on the **Recipients** widget.
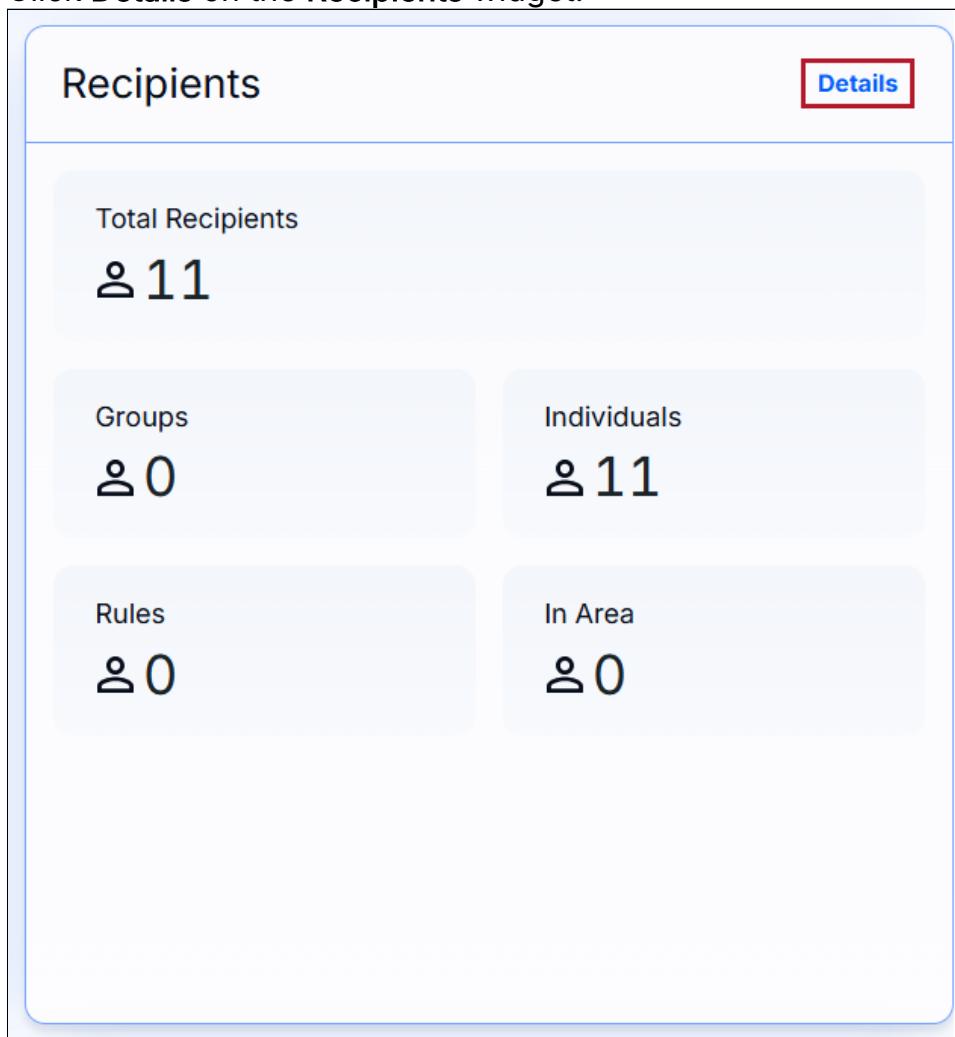
3. The **Recipient Details** page opens. Click the **Export Recipient Details** button to generate the download.

4. Click the download to open and view the export.

Using Communication Notes

Users can leave **Notes** on both Active or Closed Communications from their **Details** pages to relay important context or updates to internal operators and stakeholders.

To leave a Note:

1. Click the **Notes** button at the top of the **Communication Details** page.
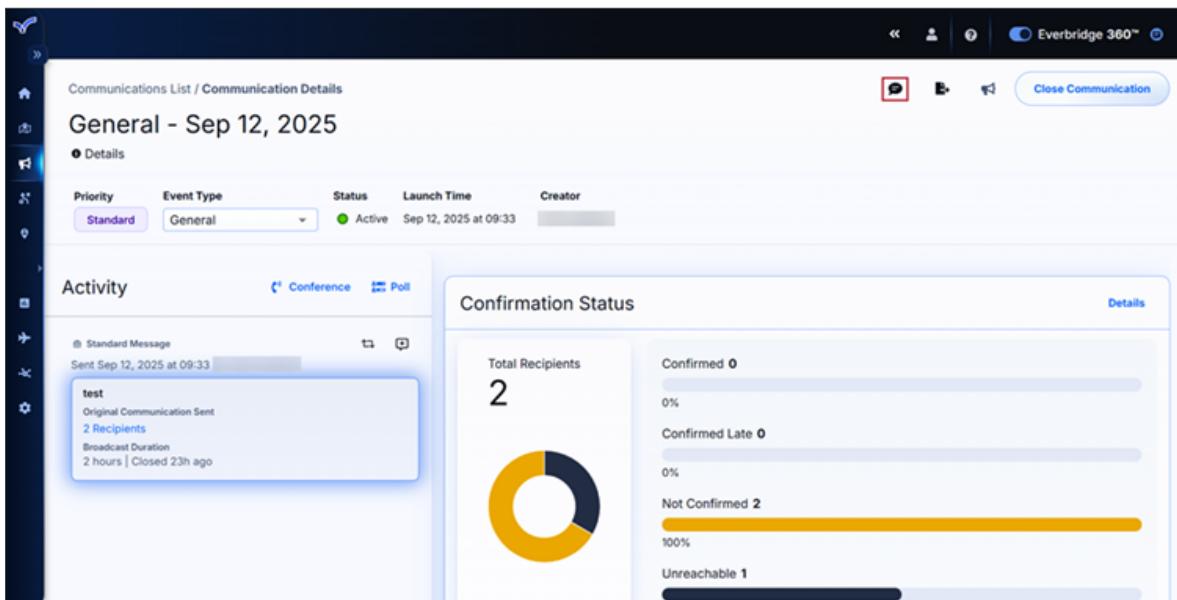
2. The **Notes** modal will open to the right, where users can add text to the field and add attachments. Optionally, click the meatball menu icon to reveal more Rich Text options, if needed, including hyperlinks, tables, source code, and more.
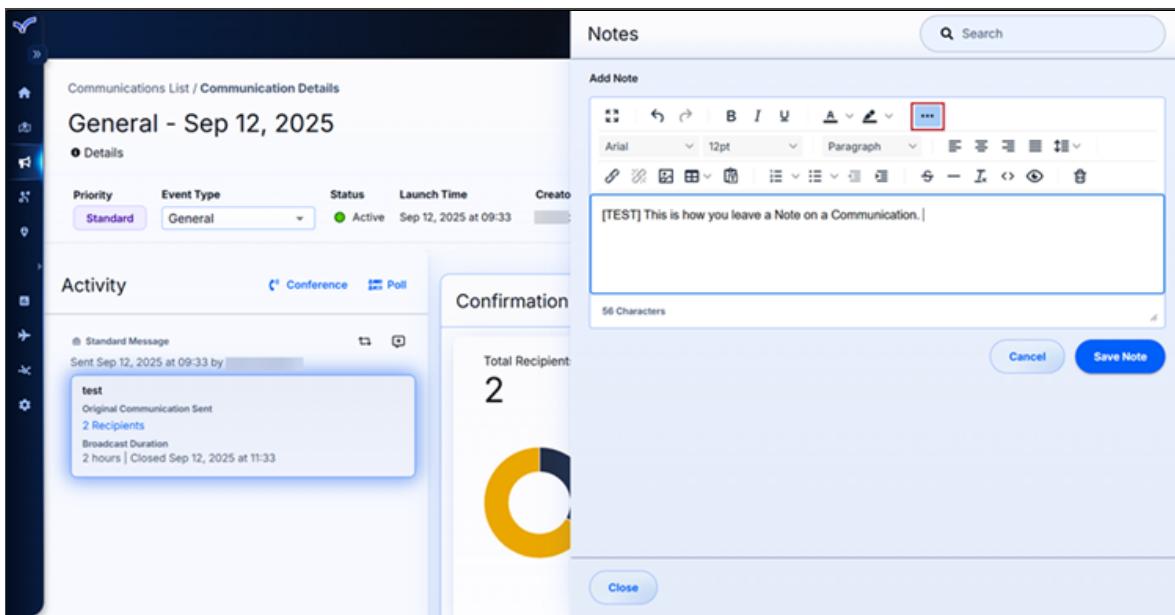
- The size of the text field in the **Notes** modal can be expanded or reduced by clicking and dragging the bottom-right corner to the appropriate size.
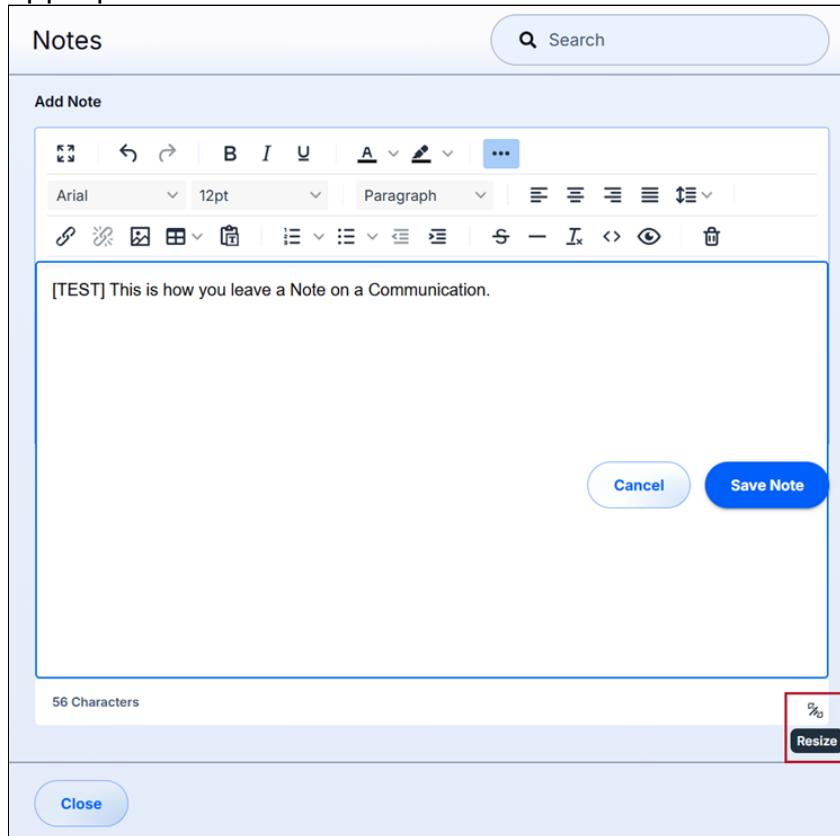
3. Click **Save**. The new Note will now appear in the list at the top of the **Note** modal.
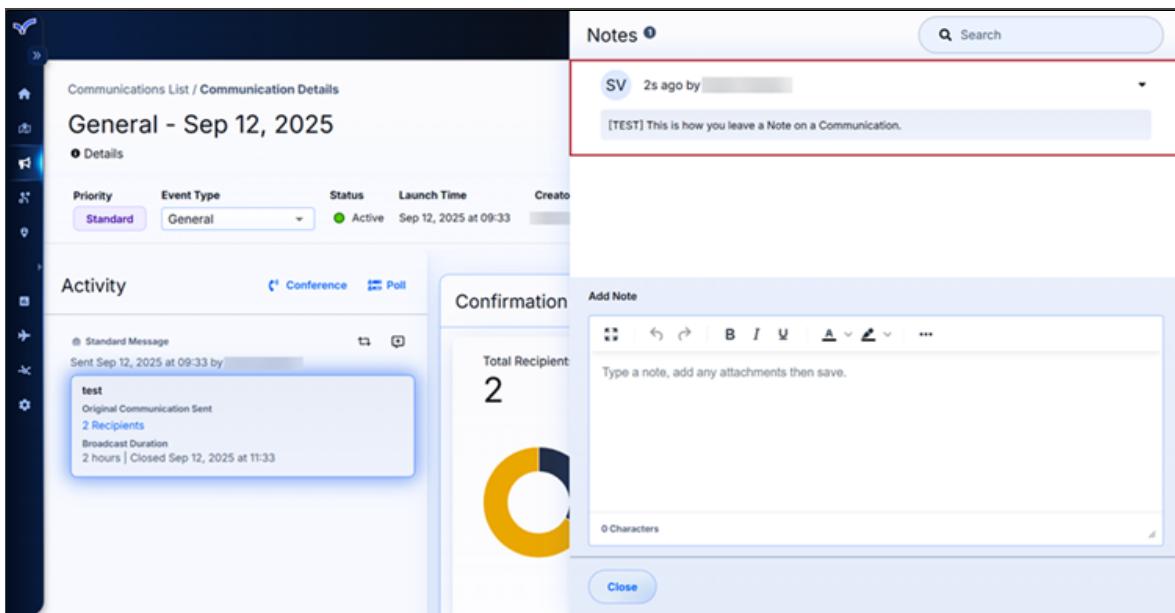
Rich Text Editor Best Practices for Custom Delivery Paths

Although the toolbar to configure custom text appears similar to those in standard word processing applications, be aware that it offers minimal functionality compared to the formatting tools available in applications such as Microsoft Word.

When pasting content into **Email, Everbridge Mobile App**, Everbridge Suite may not produce the same results as in the external source.

- Content copied from Microsoft Office may not produce the same results as in Microsoft Office.
- Not all content copied from Web pages may be preserved in the original format if the source uses custom or proprietary HTML tags.
- Not all fonts, bullets, numbering, and indentation are supported when pasting content.

Other considerations include:

- The maximum amount of content that can be saved and used in the **Email, Everbridge Mobile App** field is 1 MB; Everbridge Suite does not currently display a character or content counter. You see a message only when you have more than 1 MB of content when you attempt to Launch Communication. (Image file sizes are excluded from the maximum Custom Email content size of 1 MB.)
- If your Organization uses a custom email header and footer (set in **Settings** > **Organization** > **Notification** > **Email Header and Footer**), then do not include a header and footer in the email. The Everbridge Suite application automatically inserts your custom header and footer when sending an email message.

Using Images

Although you can copy and paste images from an external source (except Microsoft Word), Everbridge recommends you use **Insert/Edit image** from the formatting toolbar for the best results. You can either:

- Enter a URL address to retrieve an image from an Internet-accessible server.
- Choose a file from your computing device.

To do this:

1. Select **Insert/edit image.**
2. Do one of the following:

- **General** - Fill in the information fields.
- **Upload** - Drag and drop the image onto the window or browse for the image.

3. Click **Save**.

Using Tables

The most straightforward way to enter a table is to copy and paste from an external source, such as Microsoft Word. From the external source, make sure that the table column widths are the desired size because they cannot be resized once the table is pasted into the **Email, Everbridge Mobile App** pane. Alternatively, insert a table directly.

1. Place the mouse cursor where you want the table.
2. Select **Table**.
3. Select the cells (columns and rows) of your table.
4. Click the table to display the properties you can change. You can also make the same changes by clicking **Table** again.

Converting Text to HTML

Converting your text to HTML gives you the ability to change the format of text and gives you greater control over the format of your text quickly and easily.

1. Using the **Email, Everbridge Mobile App** pane, enter your text.
2. Click **< >**. The **Source Code** dialog displays your text in HTML.
3. Click **Save**.

Copying Content Without Characters or Formatting

If you do not want hidden characters or formatted text in your custom email when you copy/paste from an external source, select **Paste as Text**.

Event Types

Event Types define the type of events that impact your Organization and are tied to the types of Communications you would like to launch to your contacts. Link every Communication to an Event Type for ease of tracking, reporting, and retrospective capabilities. Event Types will consist of **Event Type** (parent level) and **Event Type Subcategory** (child level).

Risk-related Event Types (same as Category/Subcategory in Visual Command Center) will be available out of the box. Administrators can define custom Event Types under **Organization Settings**.

These permissions are disabled by default for non-Administrators but can be enabled and configured if required. Note that some permissions are dependent upon others:

- **Update** requires **View**.
- **Create** requires **View** and **Update**.
- **Delete** requires **View**, **Update**, and **Create**.

Things to consider when creating event types based on future potential scope:

- Auto-suggests active Alerts linked to the selected Event Type.
- Associate Templates to Event Types.
- Configure Role permission to Event Types.
- Communications workflow driven by Event Types.

> **TIP:** It's recommended to create custom Event Types in advance so that they're ready for use when the need arises.

Configuration of Event Types

Event Types can be configured at **Settings** > **Organization** > **Everbridge 360™** > **Event Types**.

Event Types will consist of an **Event Type** (parent level) and an **Event Type Subcategory** (child level). Risk-related Event Types will be available out of the box.

NOTE: If you are a Visual Command Center (VCC) customer, **Risk-related Event Types** are the same as **Category/Subcategory** in VCC.

The main display will show Event Type names, whether the Event Type is custom, the creation date, who created it (out-of-the box event types will be noted with Everbridge Default), the last modification date, and who last modified it.

By default, disabled records will be hidden, but you can see them by unchecking the **Hide disabled records** checkbox.

Event Types can be deleted by checking the box next to the desired entry and then clicking **Delete**.

Additional actions include the ability to enable and disable both custom and Everbridge Default event types.

NOTE: Disabling Everbridge Default Event Types may impact features in the Communications module as they are designed to complement each other.

Whether or not you are able to manage Event Types is tied to your role/permissions.

- Account Administrator (non-configurable and enabled)
- Organization Administrator (non-configurable and enabled)
- The following permissions are auto-on but configurable for Incident Administrators, Incident Operators, Mass Notification Operators, and Group Managers:
  - **Everbridge 360 Event Types > Create Event Type**
  - **Everbridge 360 Event Types> Update Event Type** (optional with dependency on Create Event Type)
  - **Everbridge 360 Event Types > Delete Event Type** (optional with dependency on Create Event Type)

Creating Event Types

Event Types can be created and managed at the Organization level from **Settings > Everbridge 360 > Event Types**.

Click New **Event Type**, give it a name, and click **Save**.
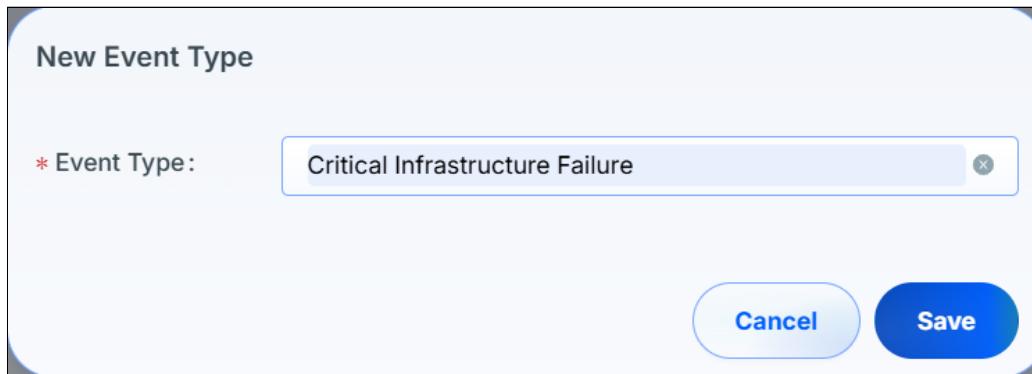
Once an Event Type has been saved, it can then be assigned to new or existing Communications templates to allow for easier grouping, association, and retrieval. See [Creating Communications Templates](#) for more details about creating Communications templates.
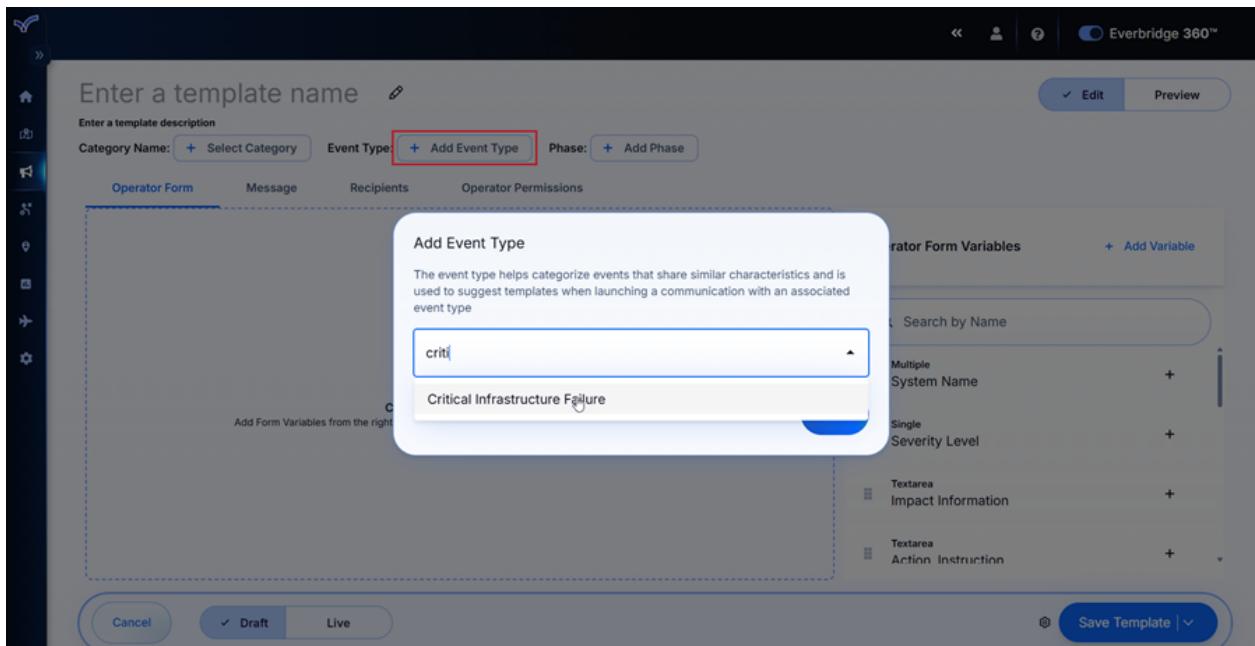
Event Type Subcategories

When creating a new Event Type Subcategory, add the Event Type Subcategory name to the **Event Type Subcategory** field. Note that Event Types must be created before they can be added to an Event Type Subcategory.
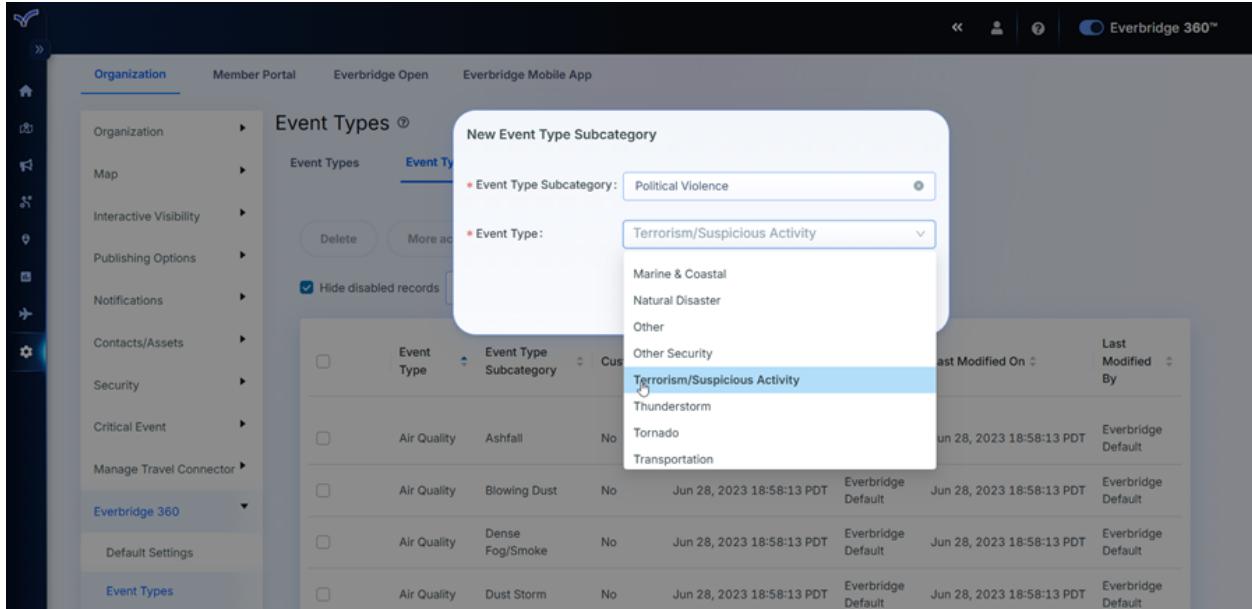
Communications Variable Library

The Communications **Variable Library** allows users to seamlessly create, update, manage, and organize variables crucial for accurately collecting and conveying critical information via Communication templates. It can be accessed from **Communications** > **Variable Library**.
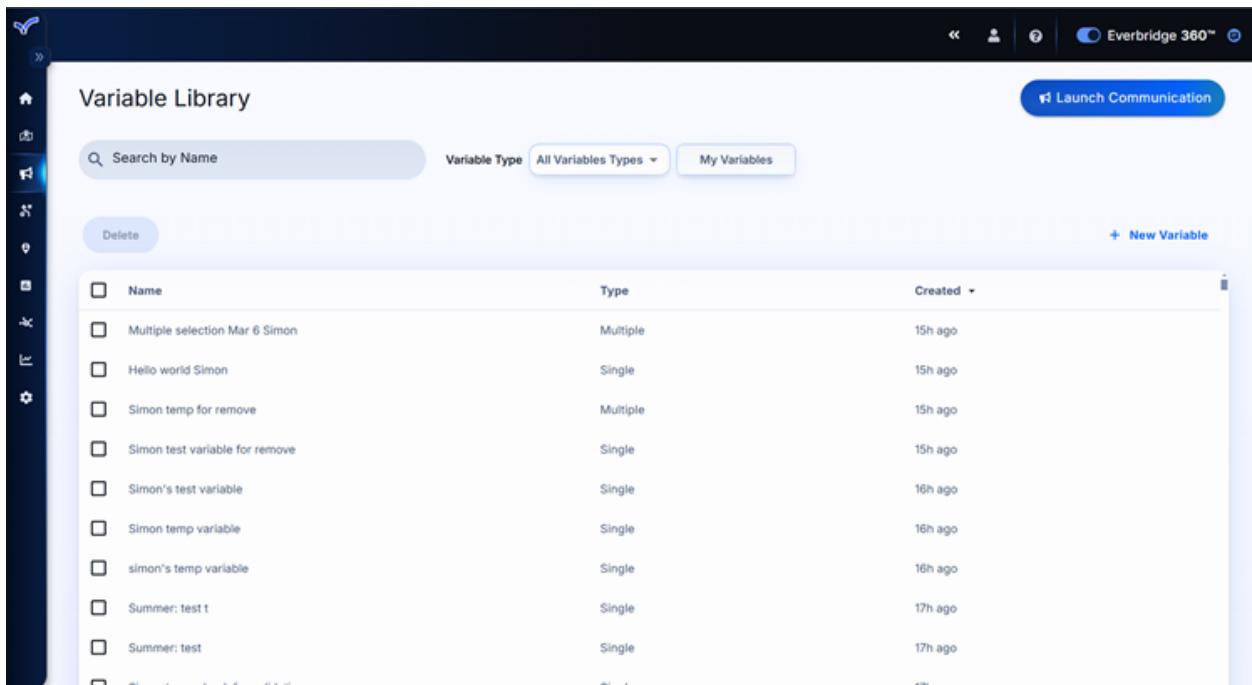
Variable Library Overview

Search, Filter, and My Variables

Variables can be located by searching by name or by filtering by the following types:

- Single Selection
- Multiple Selection
- Text Box
- Textarea
- Date

Clicking **My Variables** will show a user only the variables that they've created.
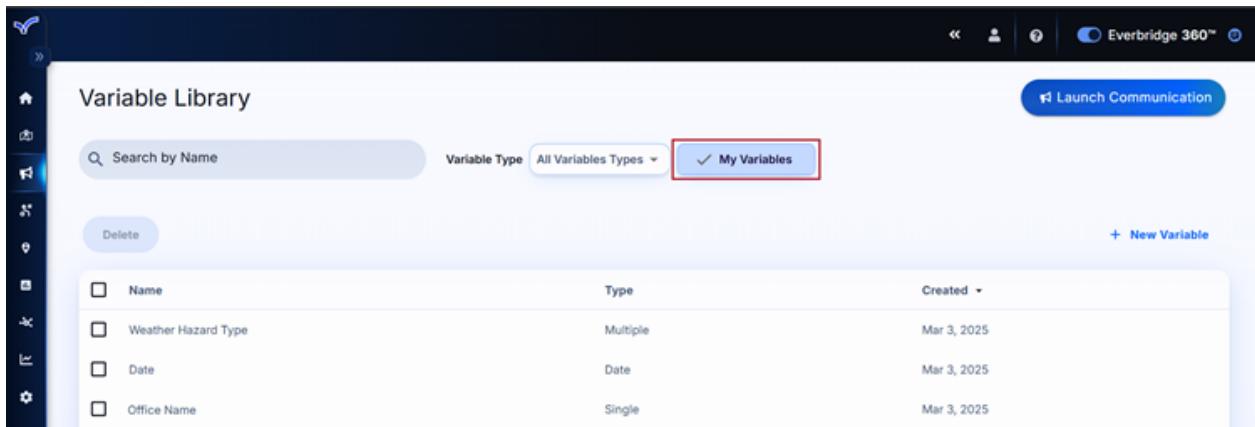
.

Clicking the header of the **Created** column will allow users to sort by creation date (oldest to newest or newest to oldest).

Managing Variables

Variables can be managed from the library by being clicked on from the list view, which will open the **Variable Details** panel to the right.

The Variable Details panel displays the following information about the selected variable:

- Variable Name
- Last Updated
- Last Updated By
- Type
- Tooltip
- Options
- Created
- Created By

From there, the following actions can be taken:

- Click the **Delete** button to delete the variable. A confirmation modal will appear warning the user that doing so will also remove it from any Communications templates that currently contain it. Click **Delete** to confirm.
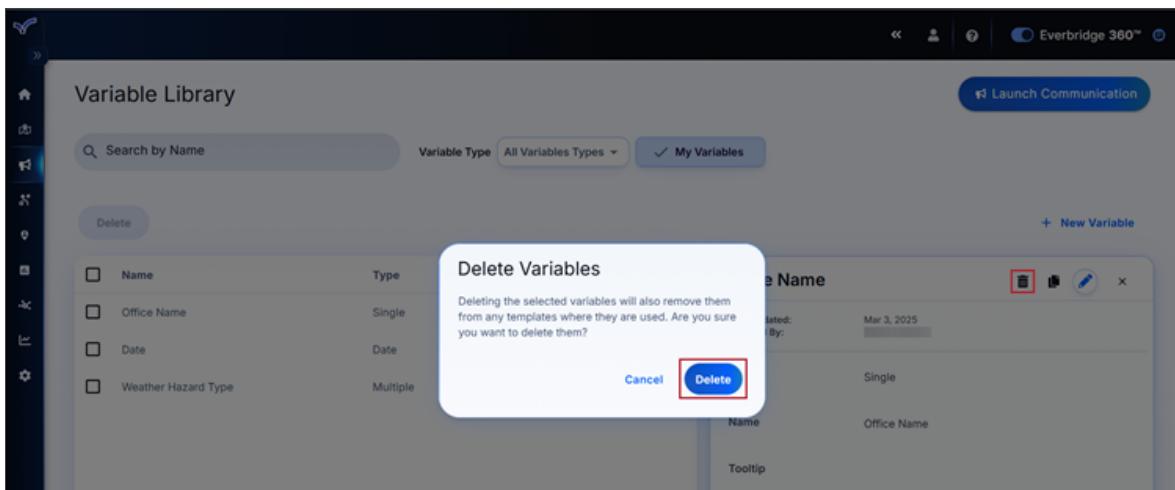
- ○ Variables can also be deleted from the list view by selecting its checkbox and clicking **Delete**.
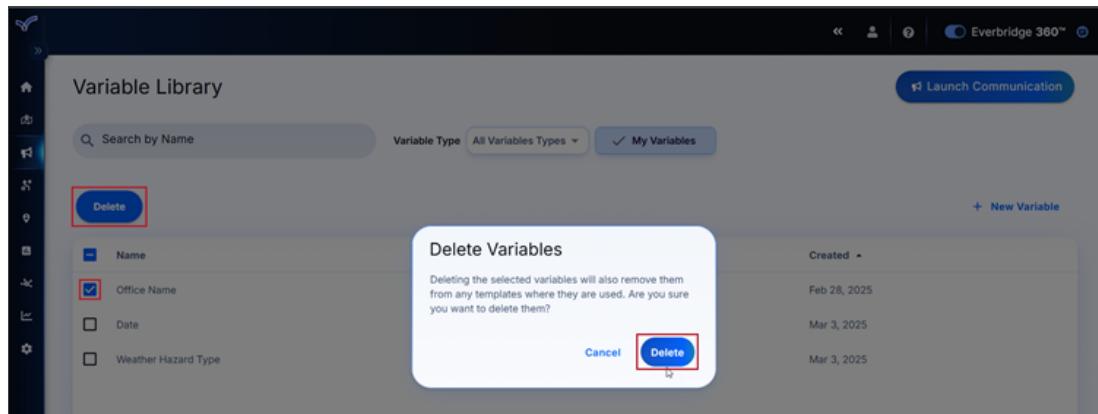
- Click **Copy** to duplicate the variable. This is useful if, for example, you want to create a similar variable with only a few minor changes without having to start from scratch. The name of the variable copy will default to the original name plus **(Copy)** until changed manually.

- Click **Edit** to modify the variable by changing its type, name, tooltip, or options. Click **Save** to keep any changes.
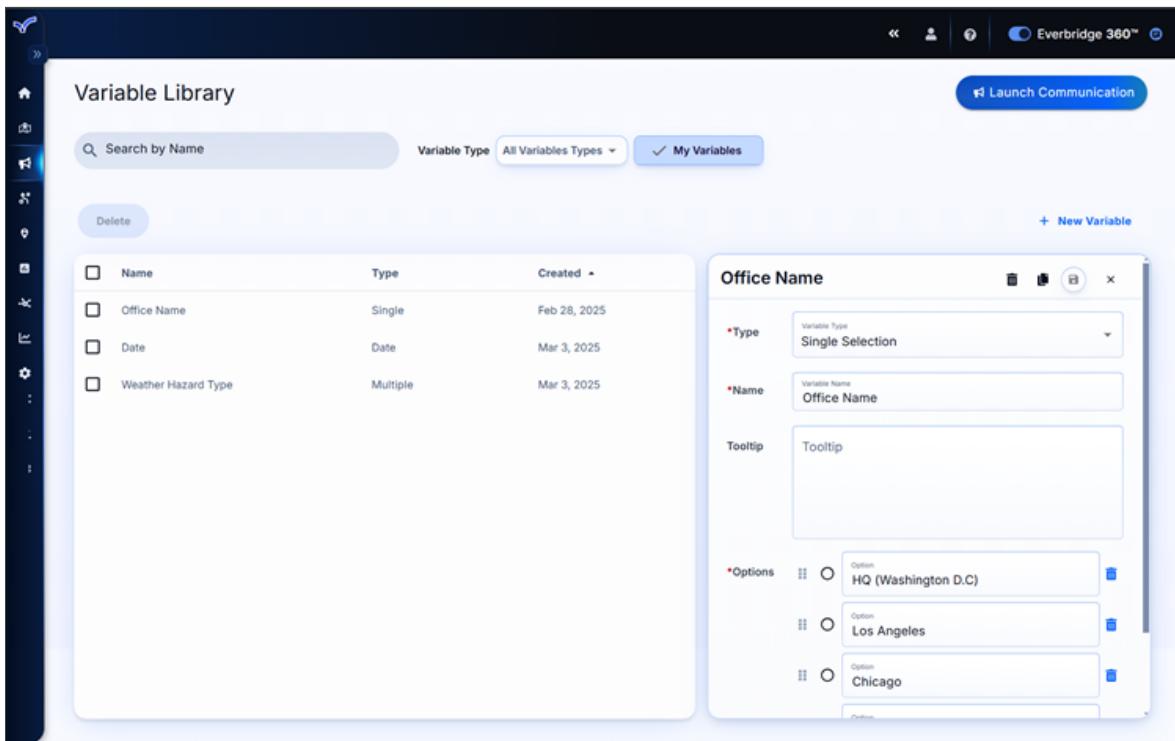
Creating Communications Variables

Users can create their own variables to use in ad-hoc Communications or Communication Templates from the **Communications Variable Library** (**Communications** > **Variable Library**).

To create a new Communications variable:

1. Click **New Variable**. The New Variable modal will appear to the right.
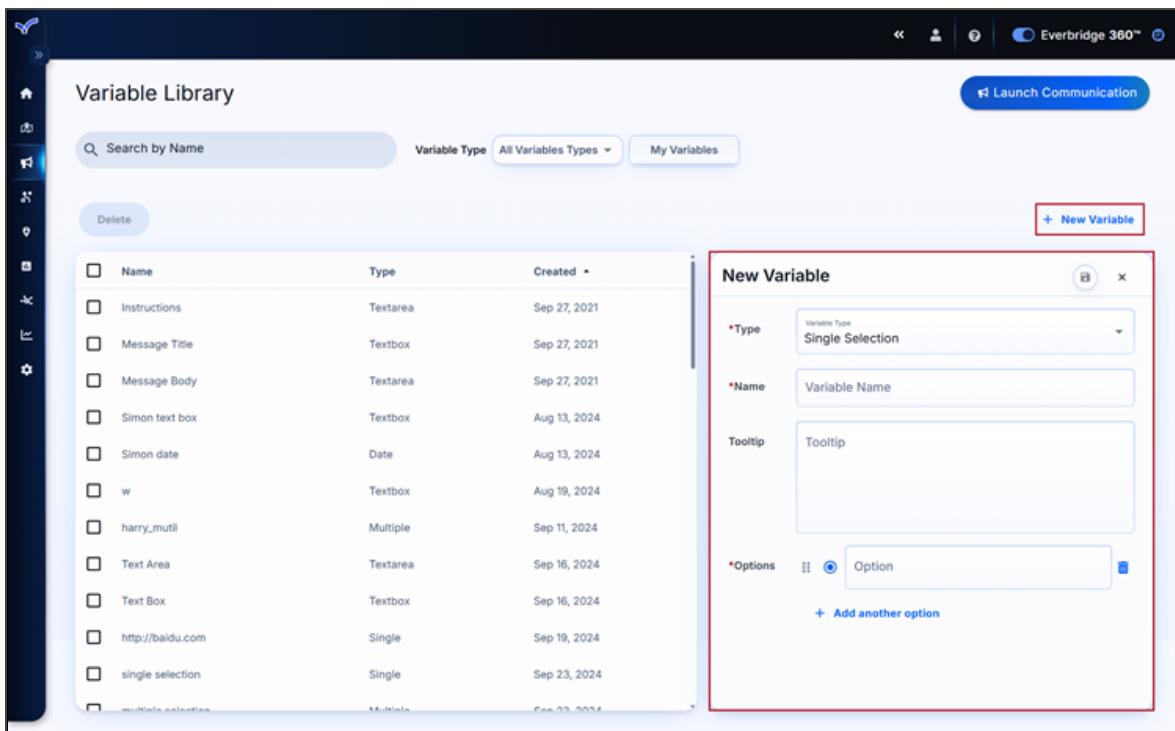
2. Choose the variable type from the following options:

- **Single Selection** - Creates a variable that prompts operators to select a single option.

- Multiple Selection - Creates a variable that prompts operators to select as many options as applicable.

- **Text Box** - Creates a text box variable that can be filled with up to 399 characters.
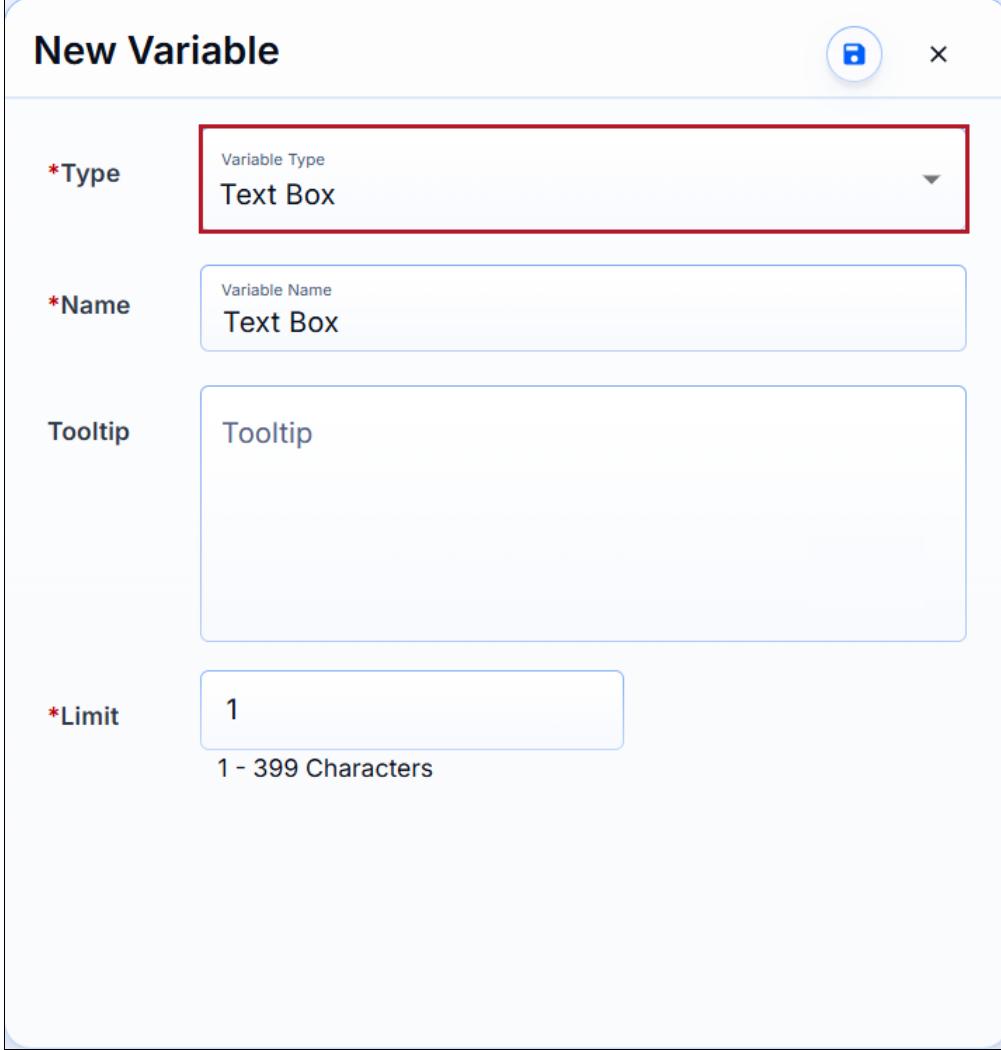
New Variable

*Type   Variable Type
Text Box ▼

*Name   Variable Name
Text Box

Tooltip   Tooltip

*Limit   1

1 - 399 Characters

- **Textarea** - Creates a text area variable that can be filled by up to 50,000 characters.
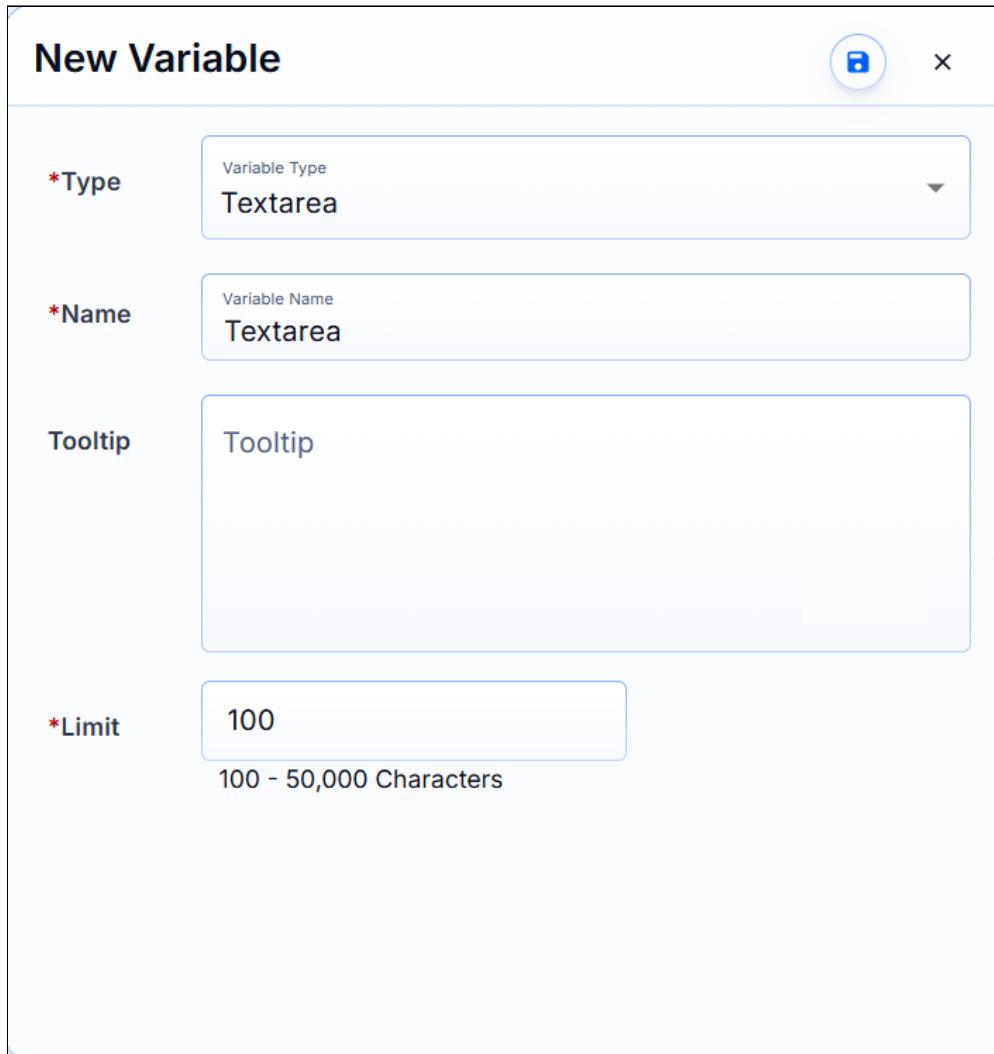
New Variable

*Type
Variable Type
Textarea

*Name
Variable Name
Textarea

Tooltip
Tooltip

*Limit
100

100 - 50,000 Characters

- **Date** - Creates a variable with a date picker with or without a specific time associated with an event. If the chosen format contains a time,

users can specify if it should use the 24-hour clock or 12-hour clock.

3. Click the **Save** button at the top of the modal to add this new variable to the library.

Once a variable has been saved to the library, it can be used in Communications templates or ad-hoc Communications sent out by an operator.

Communications Templates

Users can view and create well-organized, searchable templates that provide clear context to operators during emergencies from the **Communications Templates Library** at **Communications** > **Templates**.
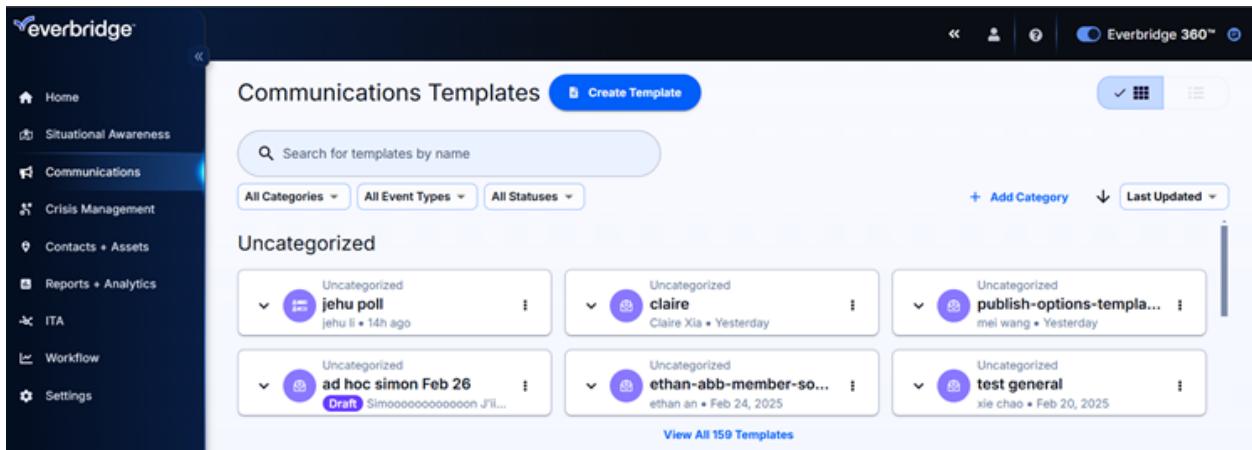
See Creating Communications Templates for more details on creating templates.

Communications Template Library

Several actions can be taken from the Communications Template Library, such as:

- Creating a new template.
- Launching a Communication from a template
- Adding a new Category
- Sorting by Name or Last Updated
- Filtering by Categories, Event Types, or both
- Filtering by Template Status (Live or Draft)
  - Templates in a Draft state will include the **Draft** tag on their tiles.
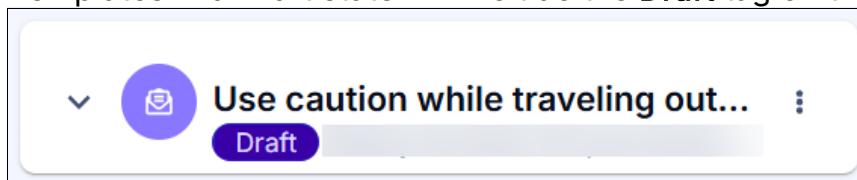
Viewing template details by clicking the down arrow on the template tile, including:

- Creator
- Created Date
- Category
- Delivery Paths
- Publishing Methods

- Recipients
- Event Type
- Description

Clicking the kebab action menu icon for a specific template tile reveals the following actions:

- Use Template
- Edit
- Rename
- Delete
- Duplicate
- Set to Draft
- Move
- Preview
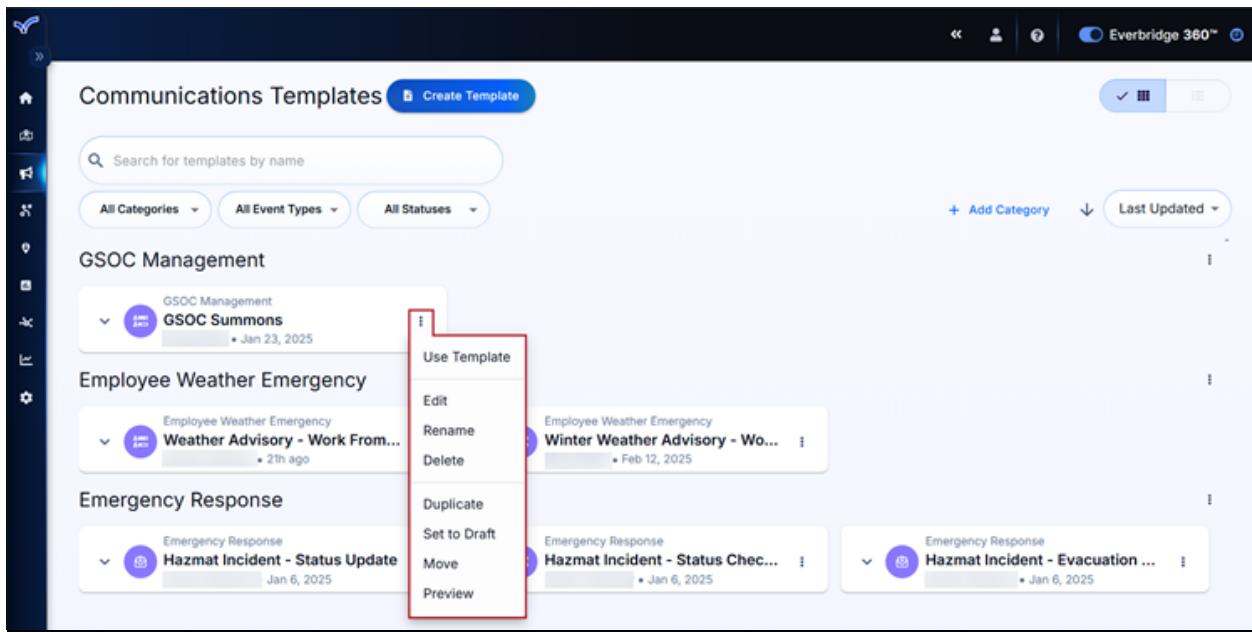
Launching a Template

Communications can be launched directly from a template by clicking the kebab menu on its card and selecting **Use Template**.
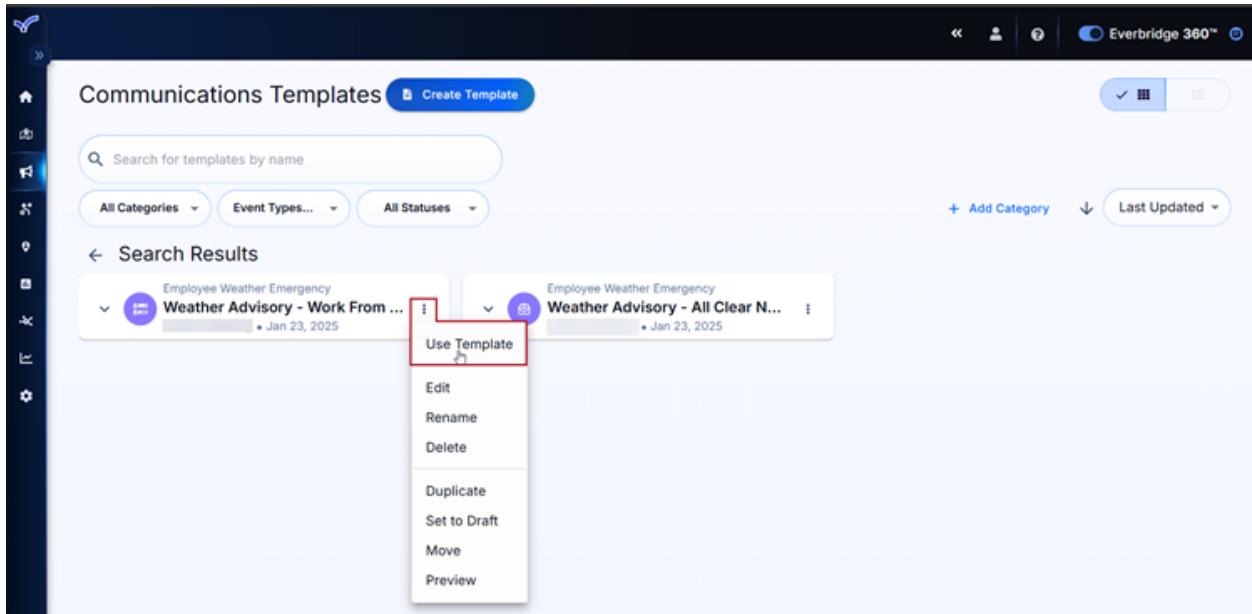
The **Launch Communication** form will appear with the template's details already filled. See [Launching a Communication from Everbridge 360](#) for more information.
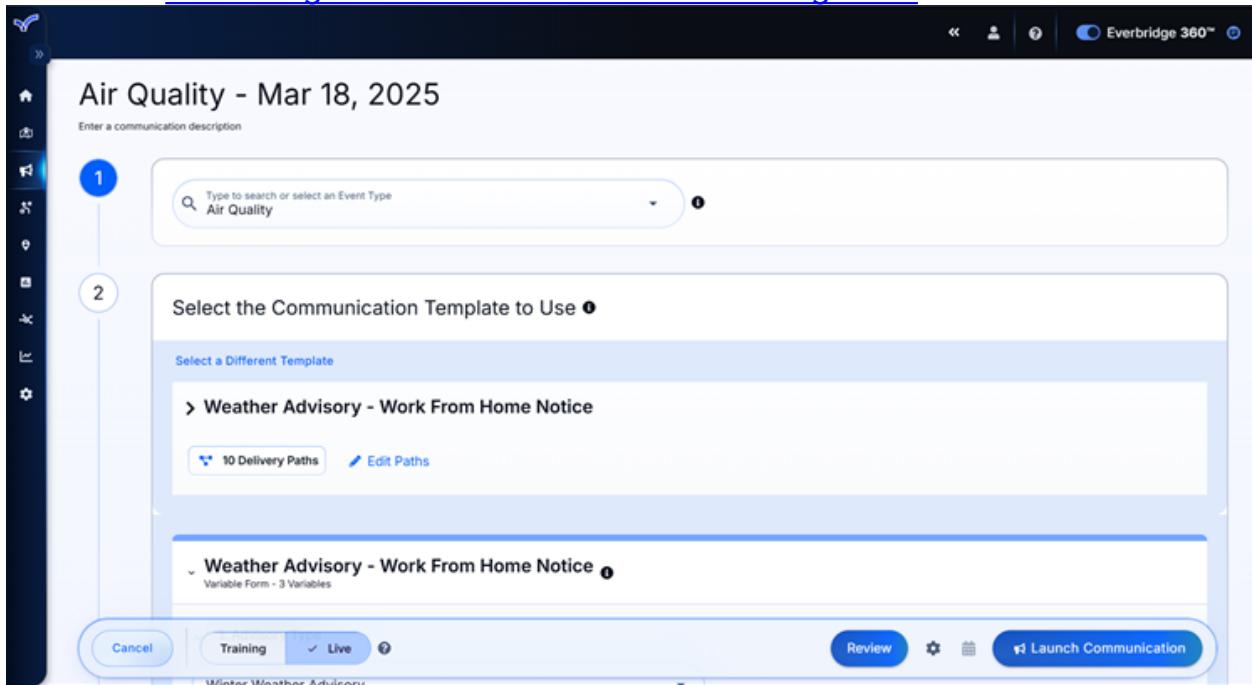
Editing a Template

Templates can be edited by clicking the kebab menu on their cards and selecting **Edit**.
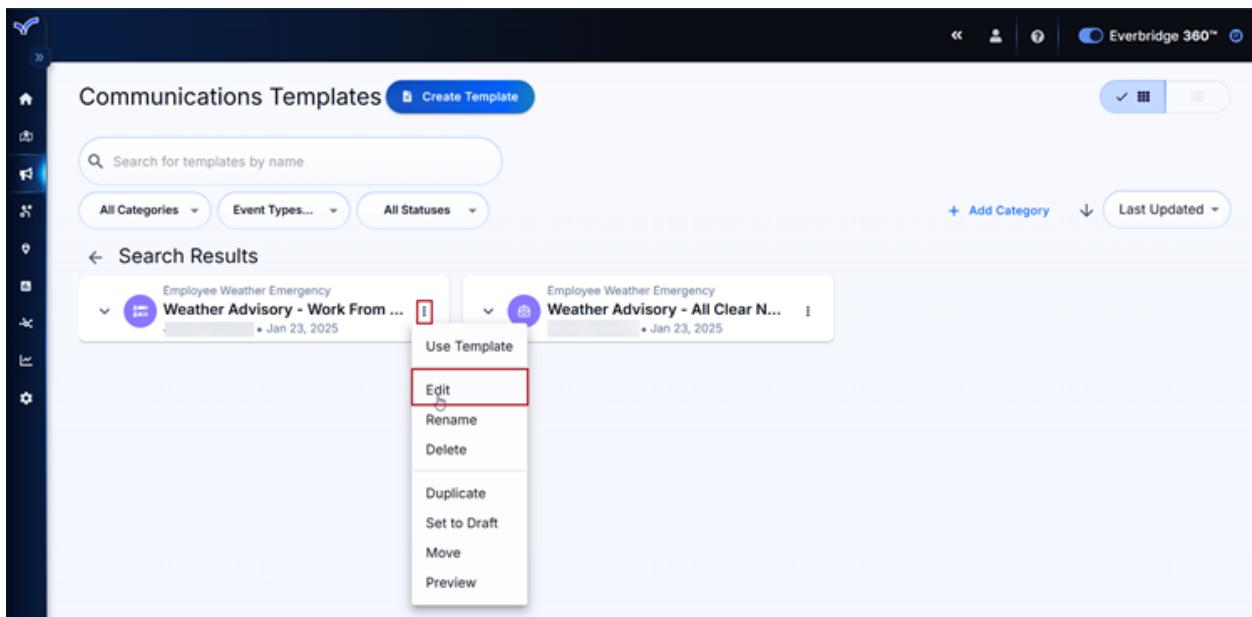
The **Edit Template** page will appear, allowing the user to make any necessary changes to the selected template. Click **Save Template** to apply the edits.
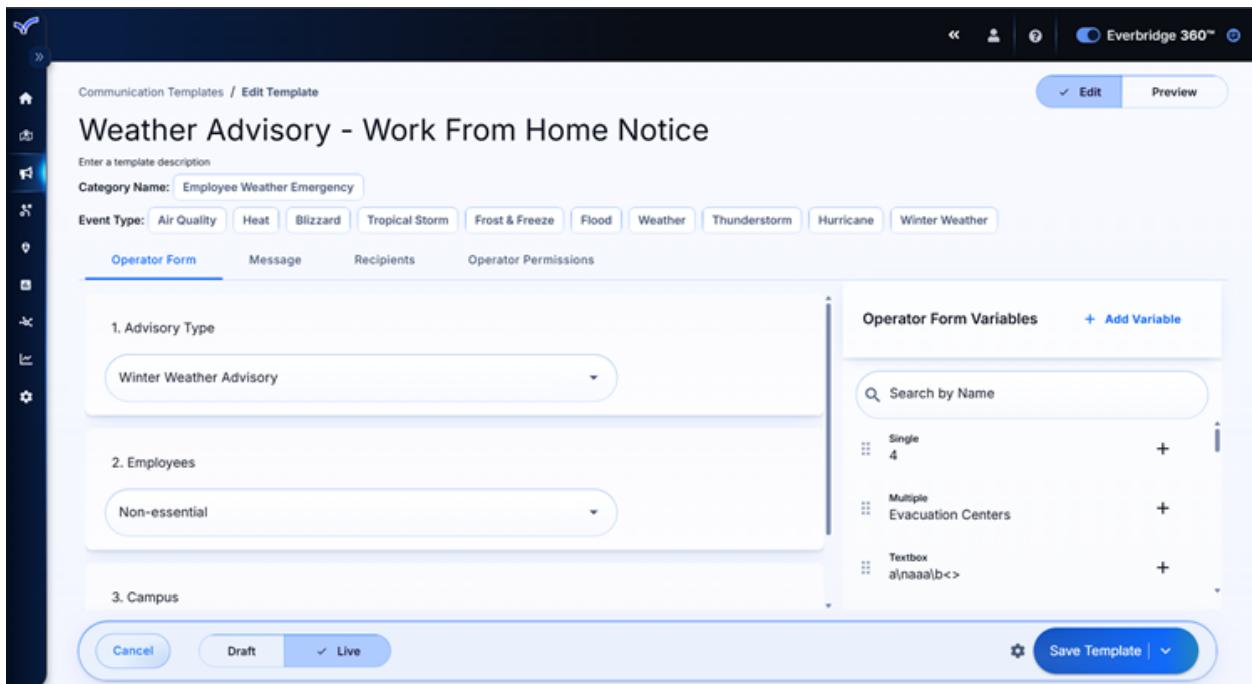
Renaming a Template

Template can be renamed by clicking the kebab menu and selecting **Rename.**
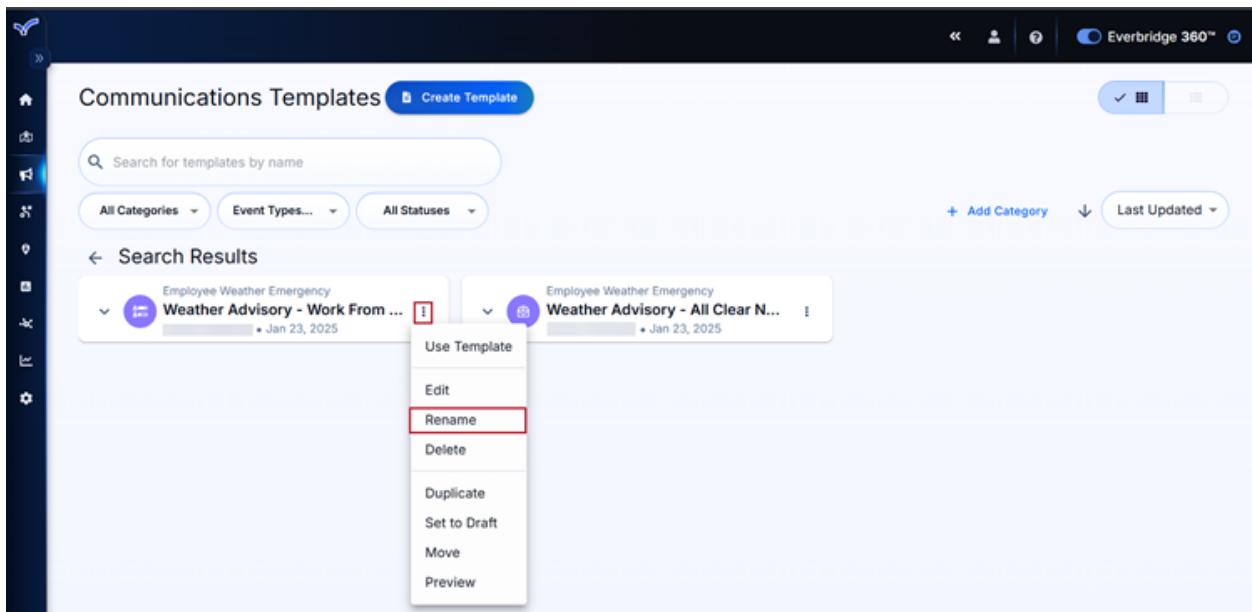
Once clicked, the user will be able to update the name using the inline text editor. Make the needed changes and click **Save.**
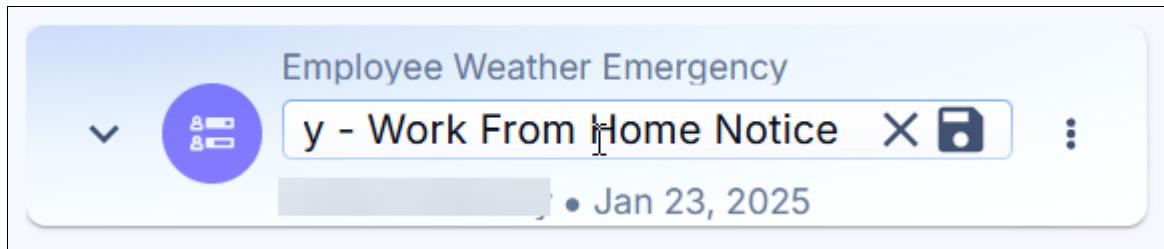
Deleting a Template

Templates can be deleted by clicking the kebab menu and selecting **Delete**. Note that deleting a template will permanently remove it from the system completely, making it unusable in future Communications.
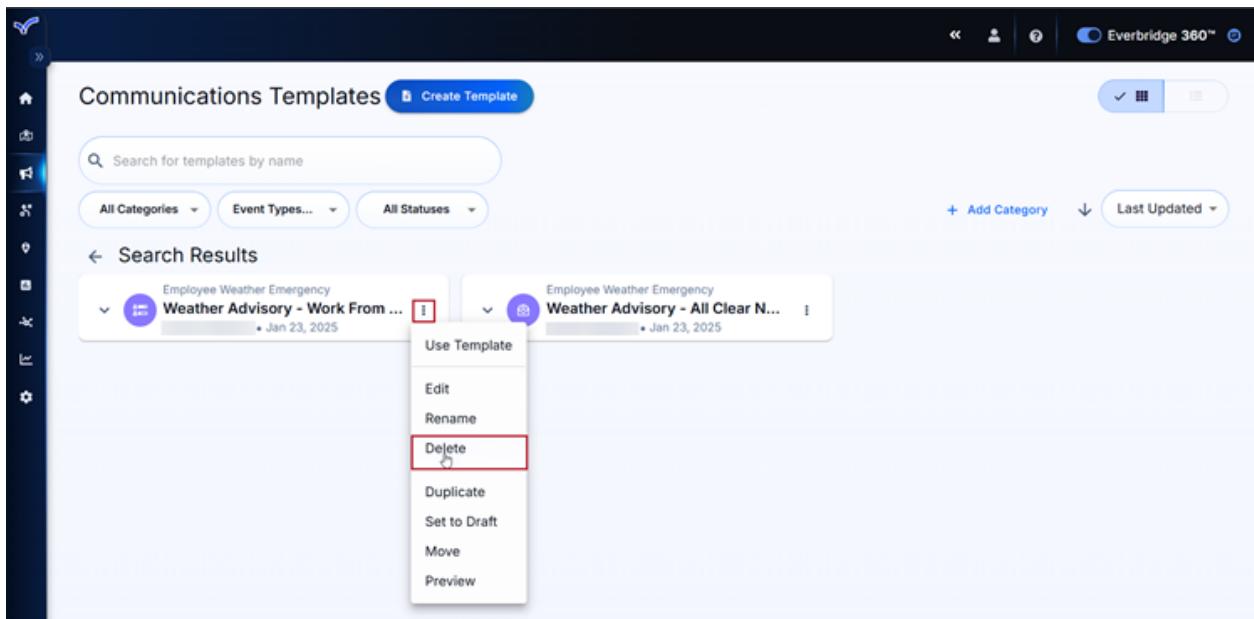
A confirmation modal will appear. Click **Delete** to proceed.
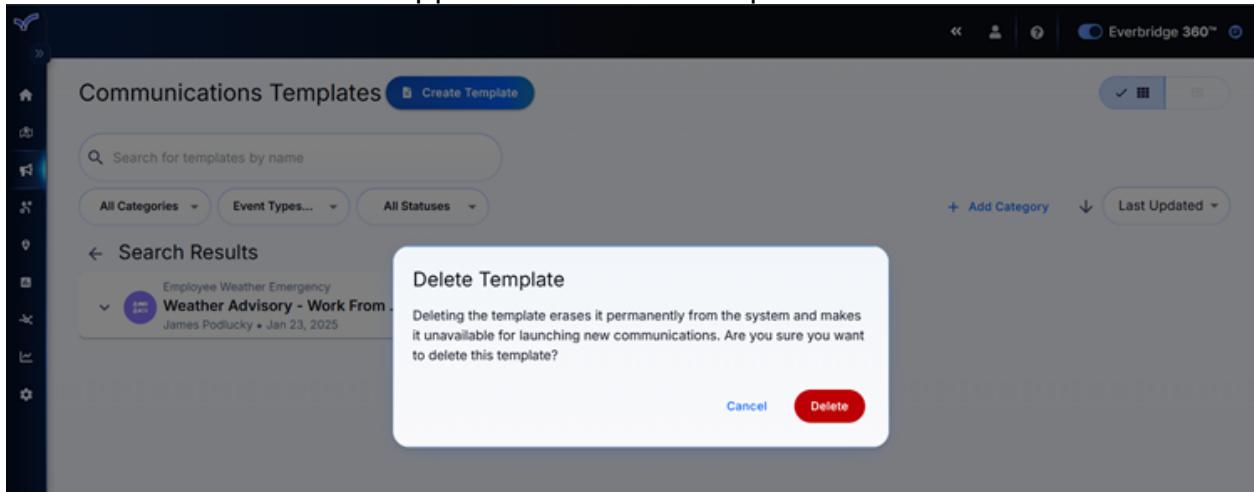
Duplicating a Template

Templates can be duplicated by clicking the **Duplicate** button, which will create a copy retaining all of the contents of the original template.
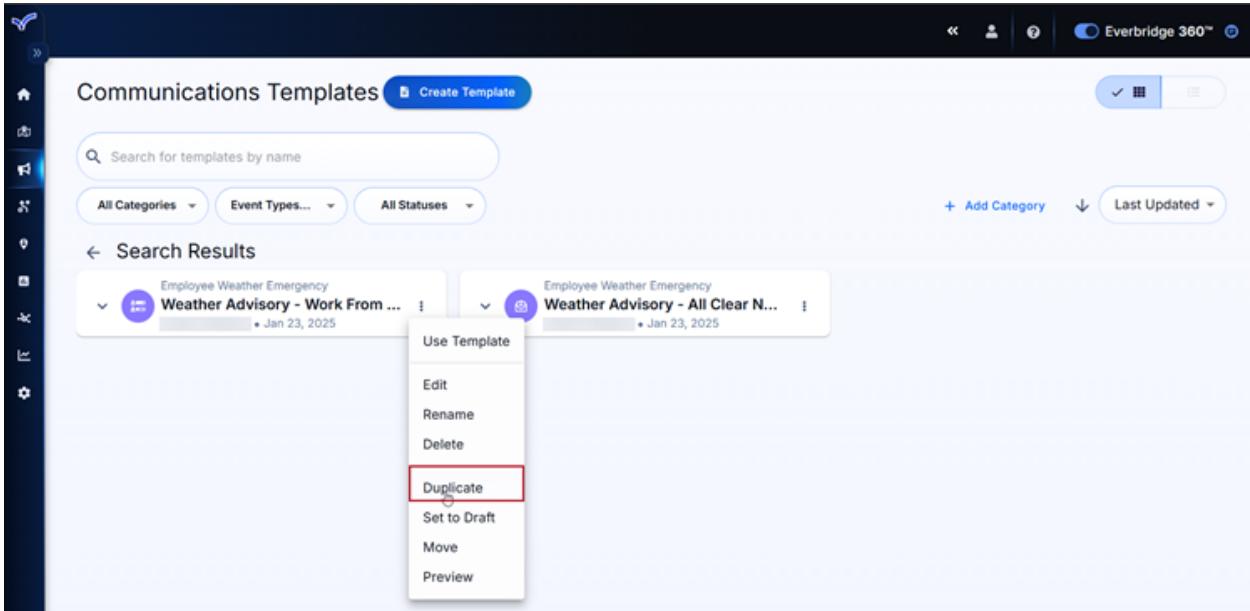
The **Create Template** form will open with all of the template's details already prefilled. The template name will be the same as the original with "Copy of..." prepended to it. Make any needed changes and click **Save Template**.
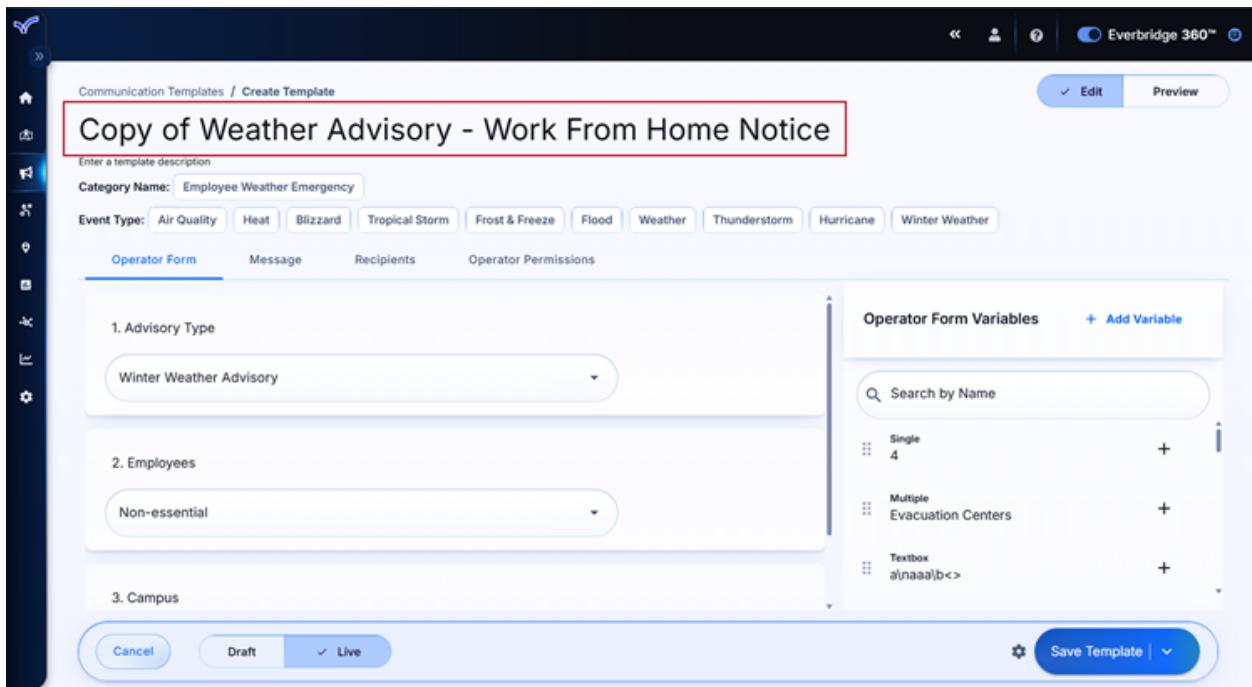
Setting a Template to a Draft State

Templates can be reverted back to a Draft state as needed by clicking the kebab menu and selecting **Set to Draft**. Note that once a template is in a Draft state, it can't be used for Communications until it's been set to Active again.
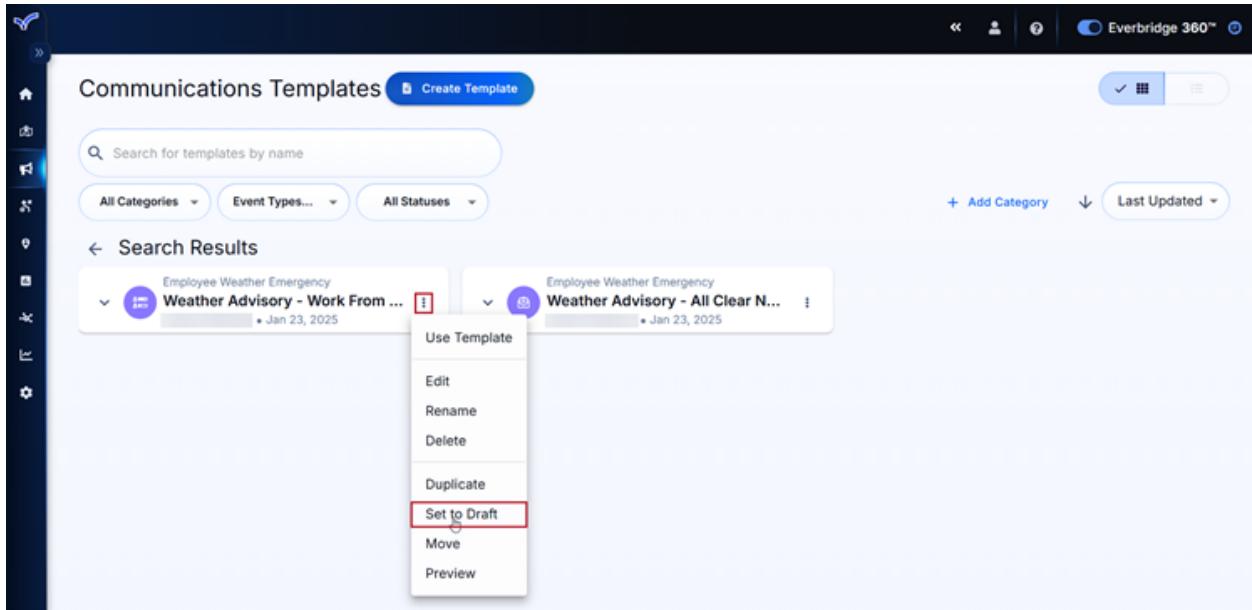
Once clicked, the **Draft** tag will appear on the template's tile, and the **Set to Live** option will replace the **Set to Draft** option in the actions menu. Click it to reactivate the template and make it usable again.
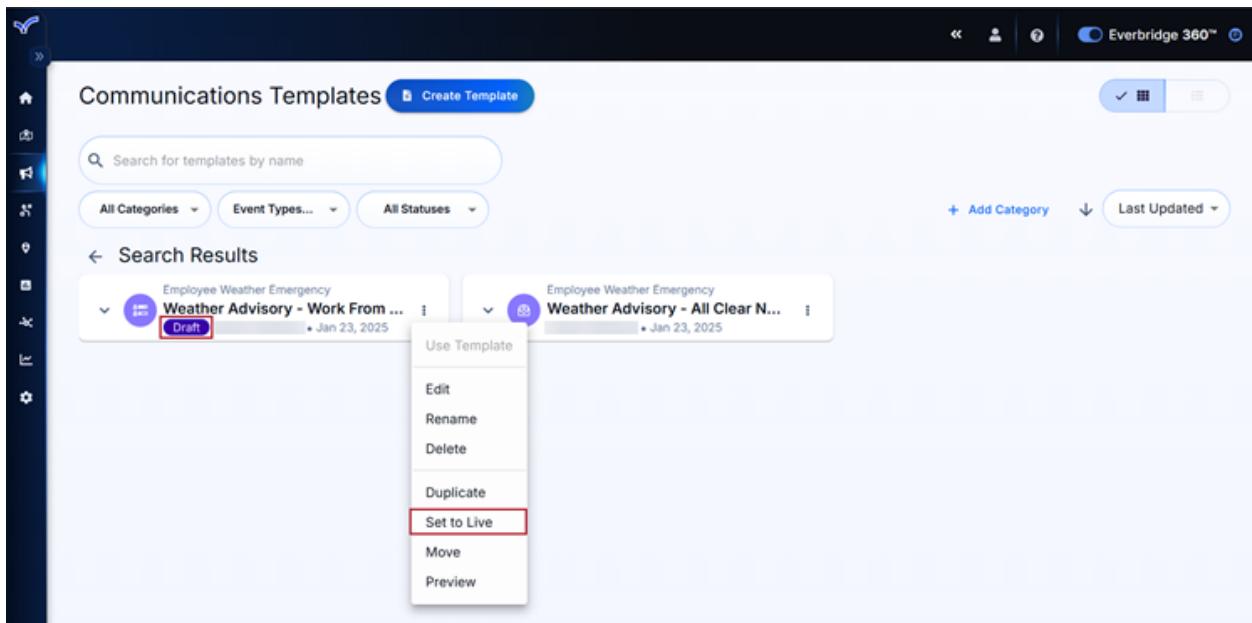
Moving a Template

Templates can be moved to a different Category by clicking the kebab menu and selecting **Move**.
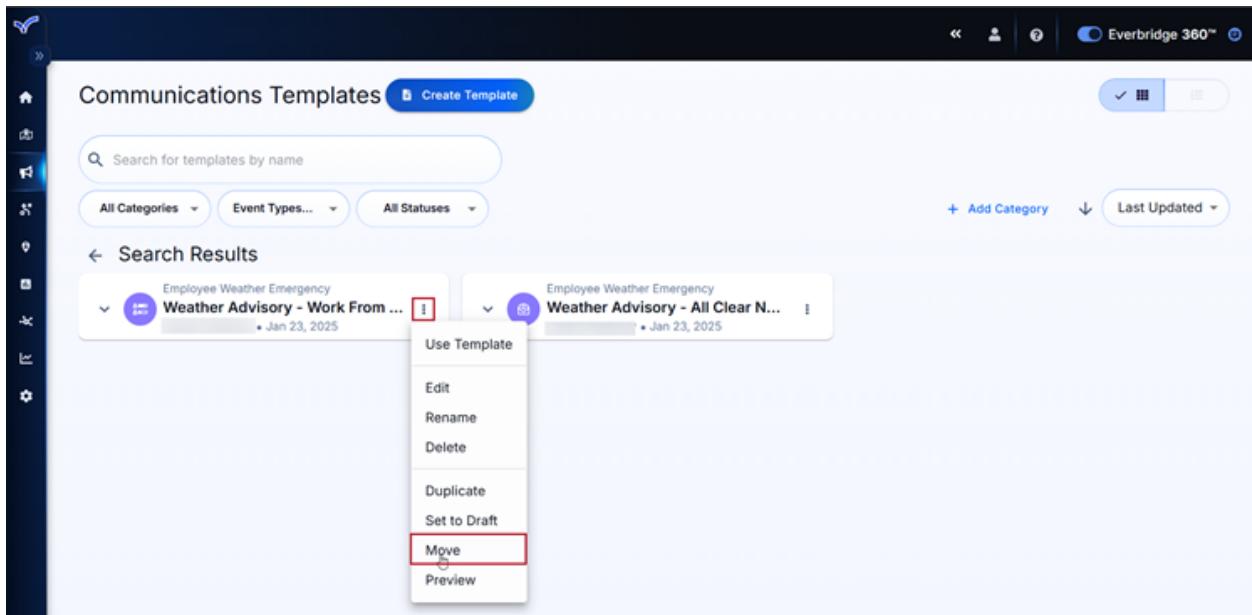
The **Move Template** modal will appear, prompting the user to select the Category to which they want to move the template. Choose the Category from the dropdown and click **Move**.
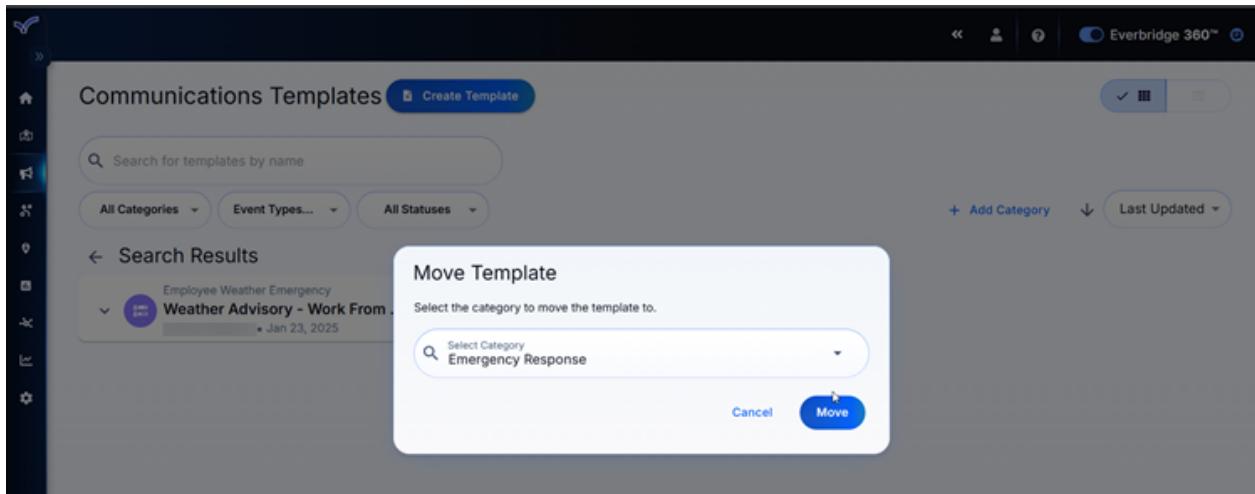
Previewing a Template

Users can preview a template, including the operator form and message, by clicking the kebab menu and selecting **Preview**.
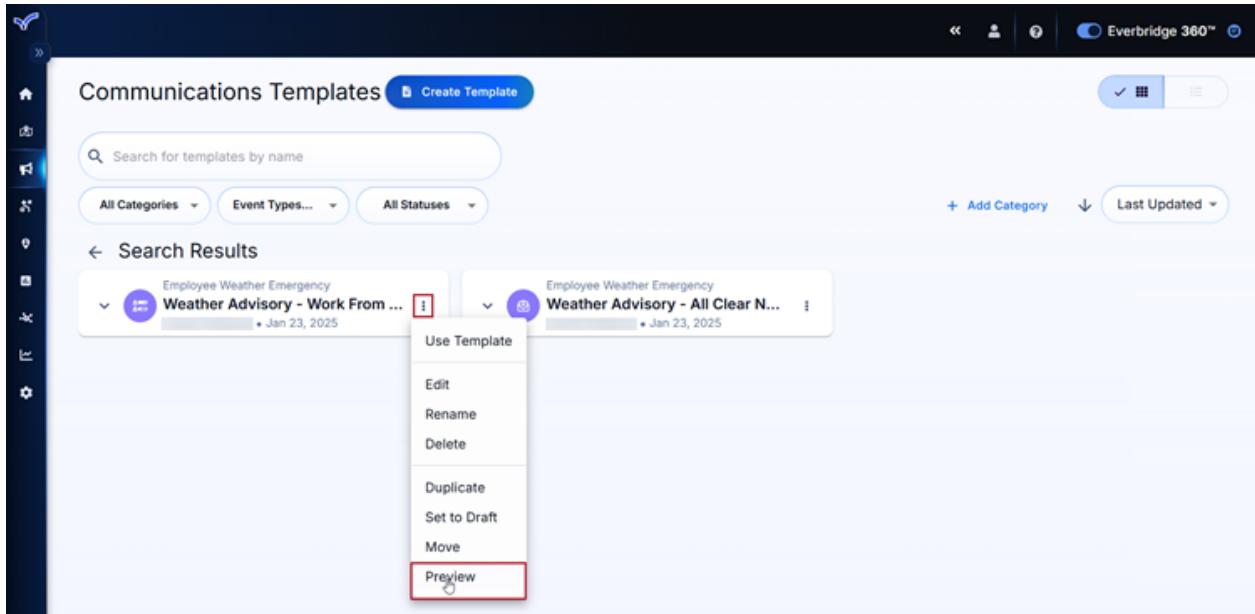
The Preview modal will appear with two tabs:

- **Operator Form**
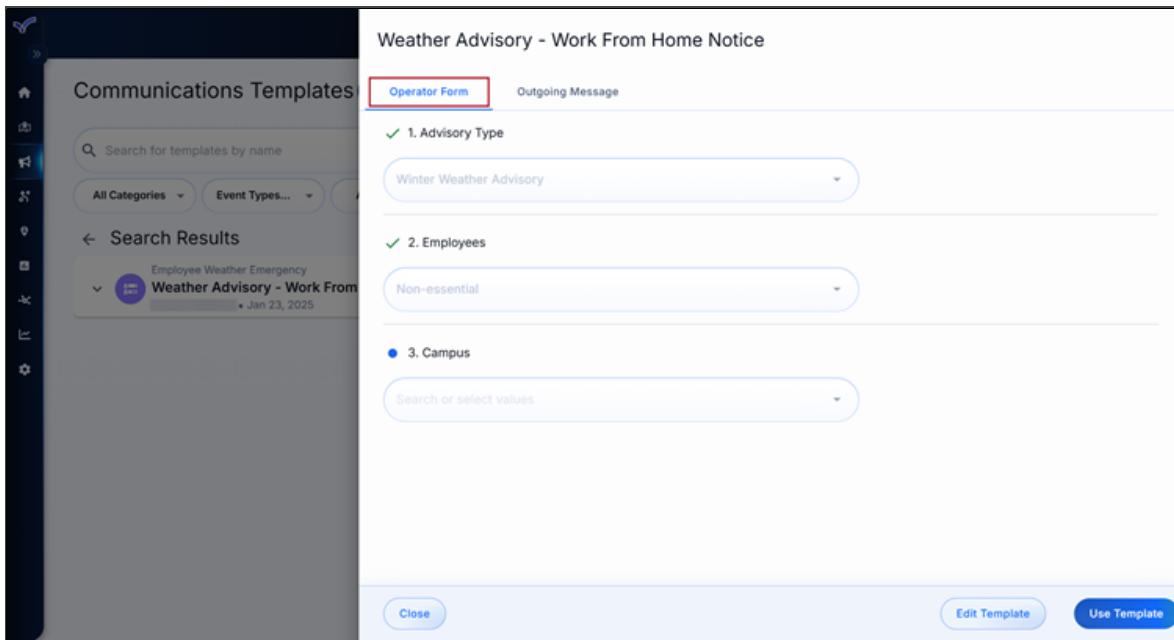
- **Outgoing Message**
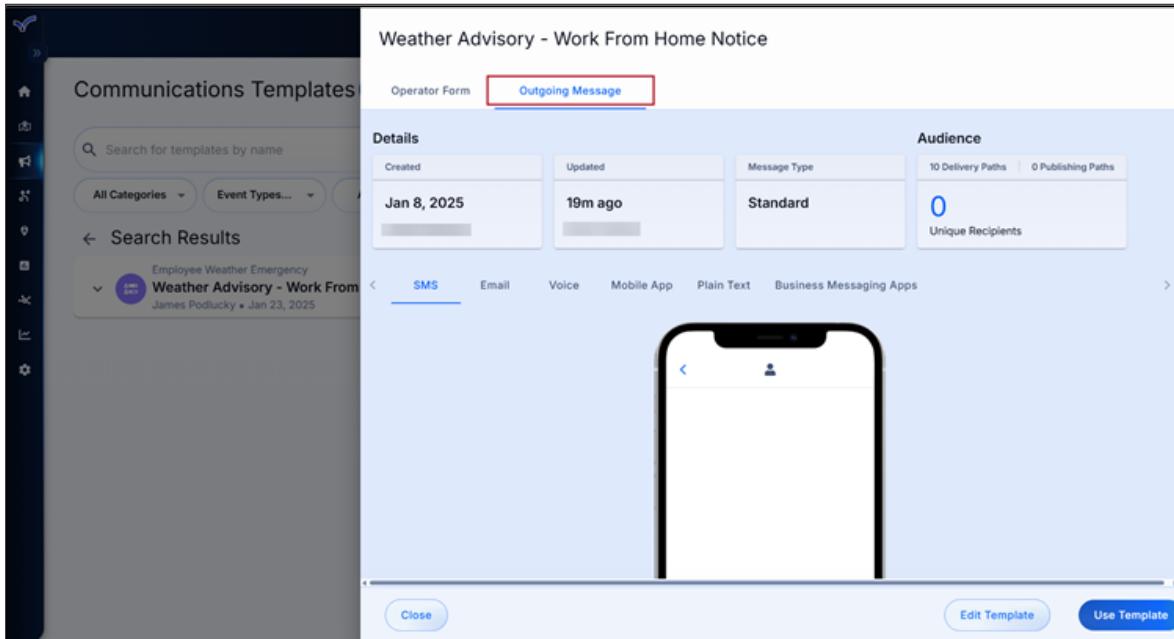
From here, users can either edit the template or use it to launch a new Communication. If neither needs to be done, click **Close** to close the preview.

Searching for Communications Templates

Use the search bar to locate Communications templates by name. Using only a partial name will also return results containing the search query. For example, searching "wea" will return any templates with the word "Weather" in their name.
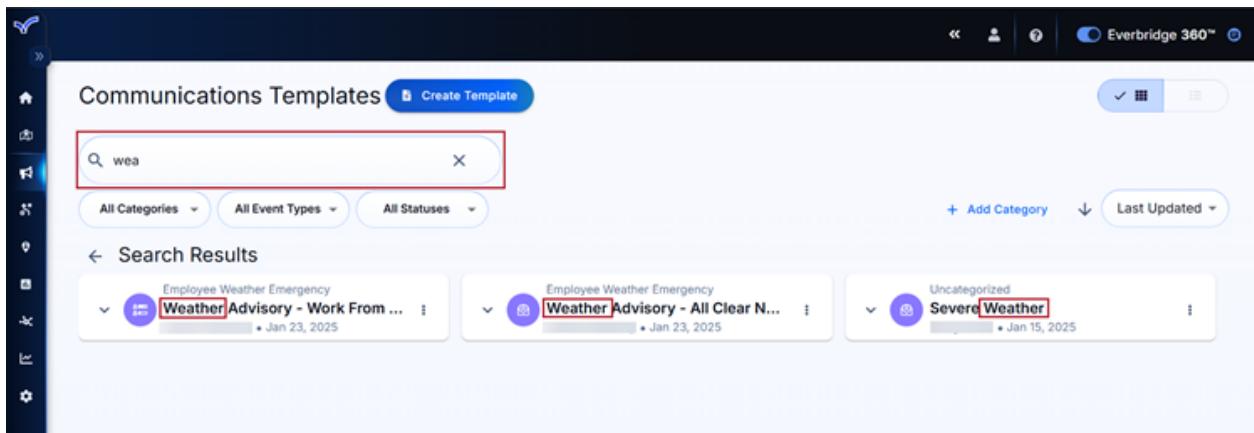
Click the **X** in the search field to clear the search query.

Filtering Templates

The template library can be filtered by the following attributes:

- Category
- Event Type
- Status

Filtering by Category

Click the **Categories** dropdown menu to filter templates by Category.
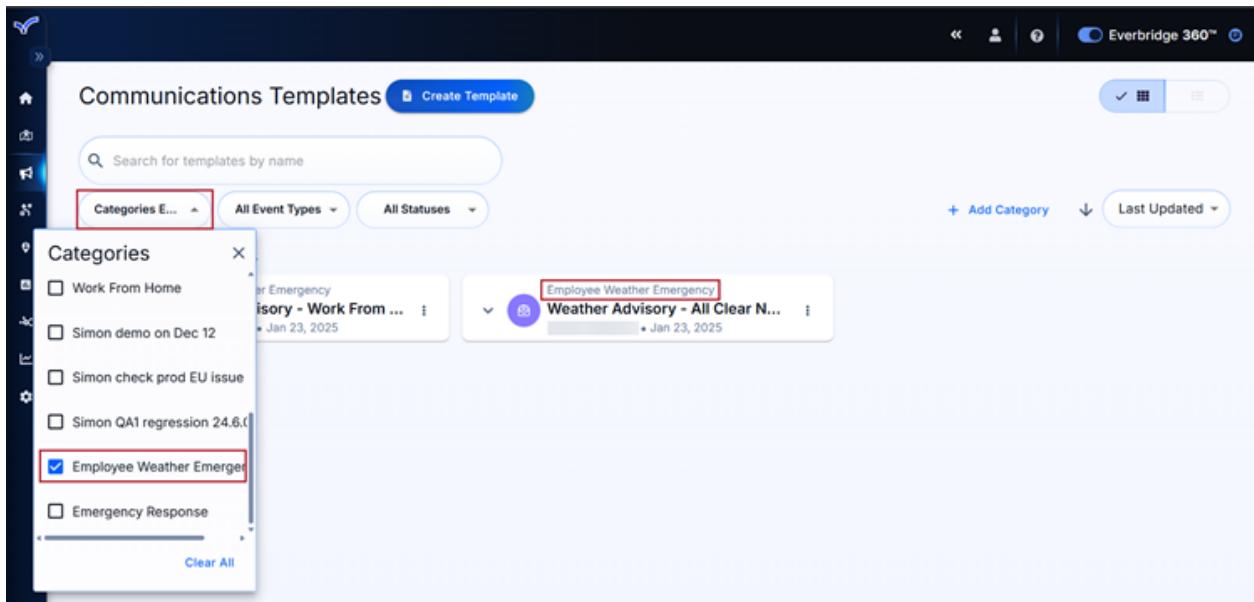
Multiple Categories can be selected at once. When the Category filter is applied, the dropdown will show the number of applied Categories. For example, in the

image below, the filters for the Emergency Response and Employee Weather Emergency Categories are applied.

Click **Clear All** at the bottom of the filter dropdown to remove the filters.

Filtering by Event Type

Click the Event Types dropdown to select an Event Type filter, which will display only templates with the selected Event Type. A template's Event Type can be seen by expanding the details on its card in the list view.

Multiple Event Types can be selected at once. When the Event Type filter is applied, the dropdown will show the number of applied Event Types. For example, in the image below, the filters for the Wildfires and Tropical Storm Event Types are applied.

Click **Clear All** at the bottom of the filter dropdown to remove the filters.

Filter by Status

There are two statuses that templates can have: Draft or Active. Click the **Statuses** dropdown to filter for either status.
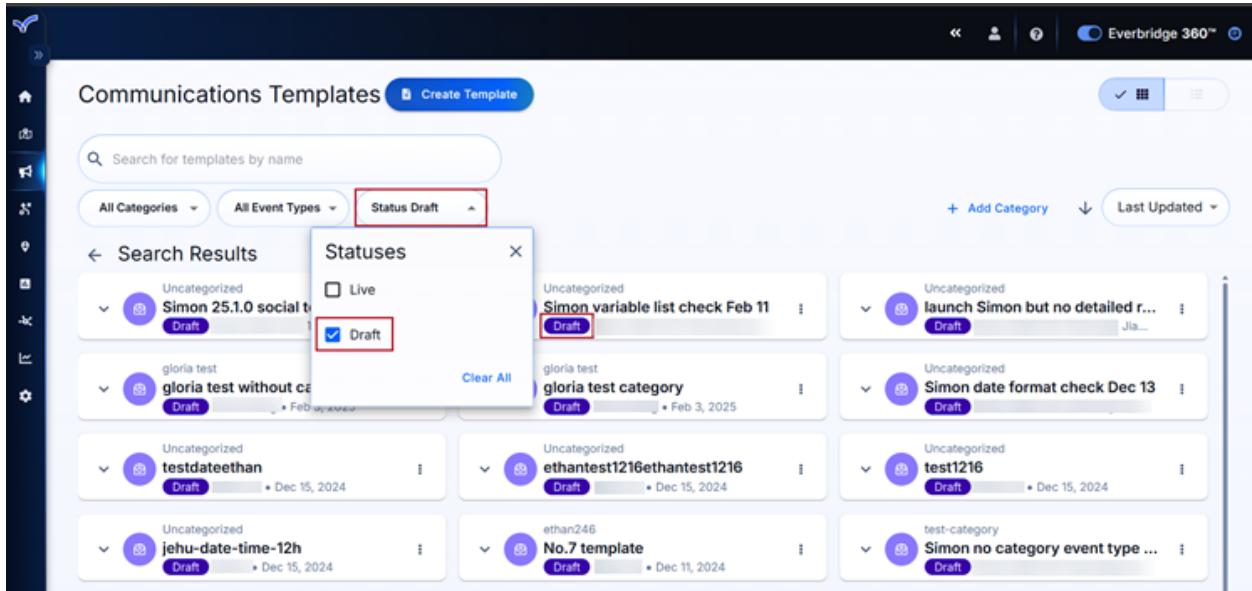
Click **Clear All** at the bottom of the filter dropdown to remove the filters.

Creating Communications Templates

Once a Communications template is created, it can be used to easily send out messages using the predefined selections. The process below outlines creating a new template, but also applies to editing existing templates.

To create a Communications template:

1. Navigate to **Communications** > **Templates** and click **Create Template**.
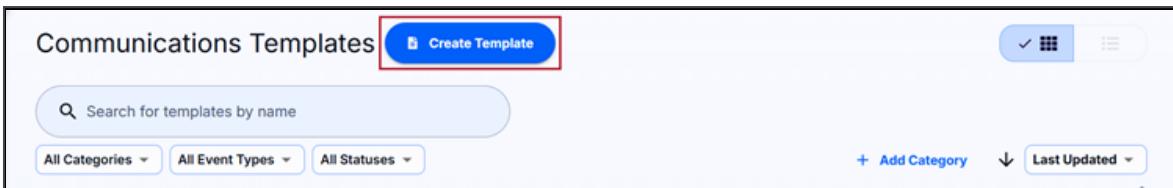
2. Enter a template name to be used for identification, organization, and retrieval. It must be 100 characters or less in length and unique within the system.
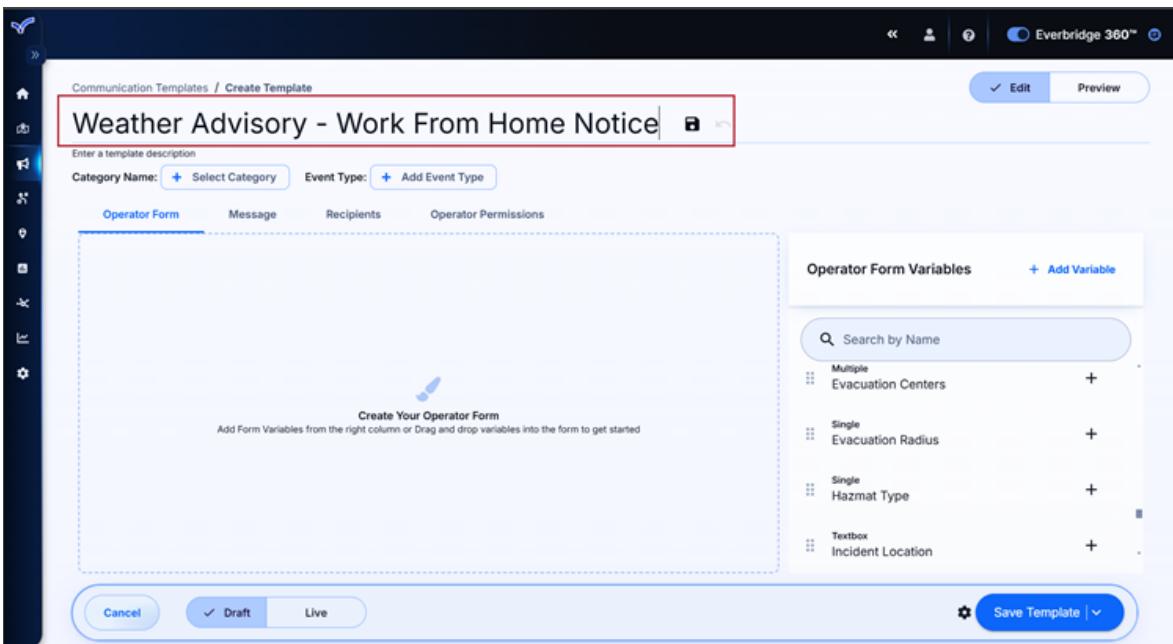
3. Click **Enter a template description** to add a description of the template to assist with appropriate usage for specific use cases. The description must be 500 characters or less.
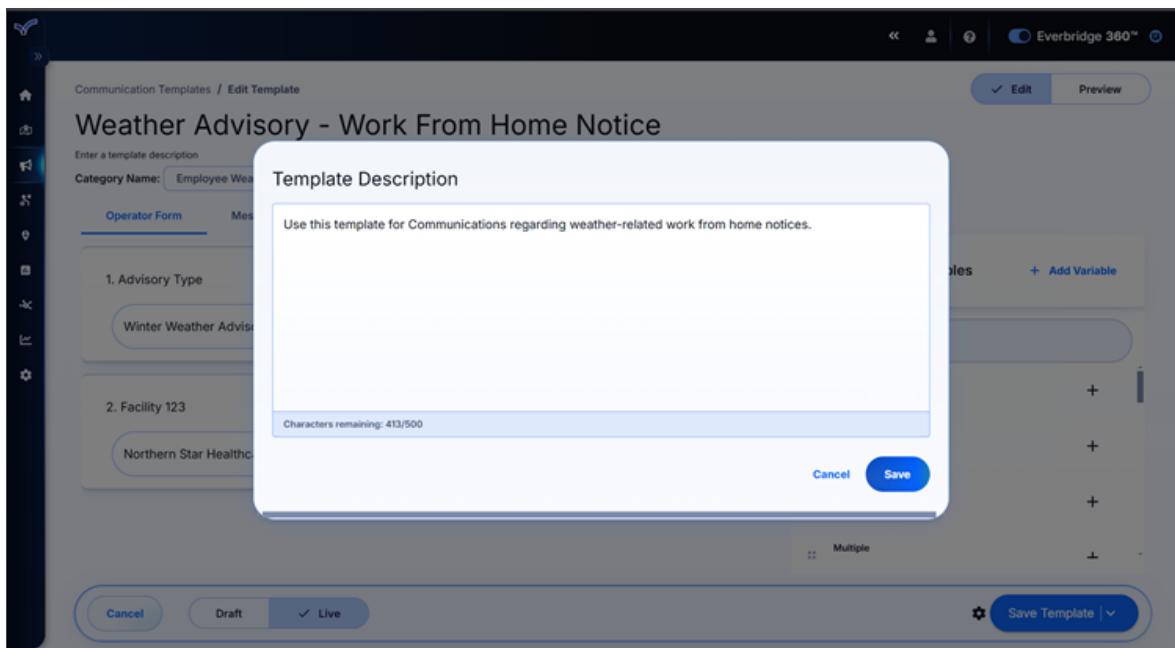
Click **Save**.

- Once the template itself has been saved, this description will be displayed for the operators' convenience during template selection when launching a Communication.
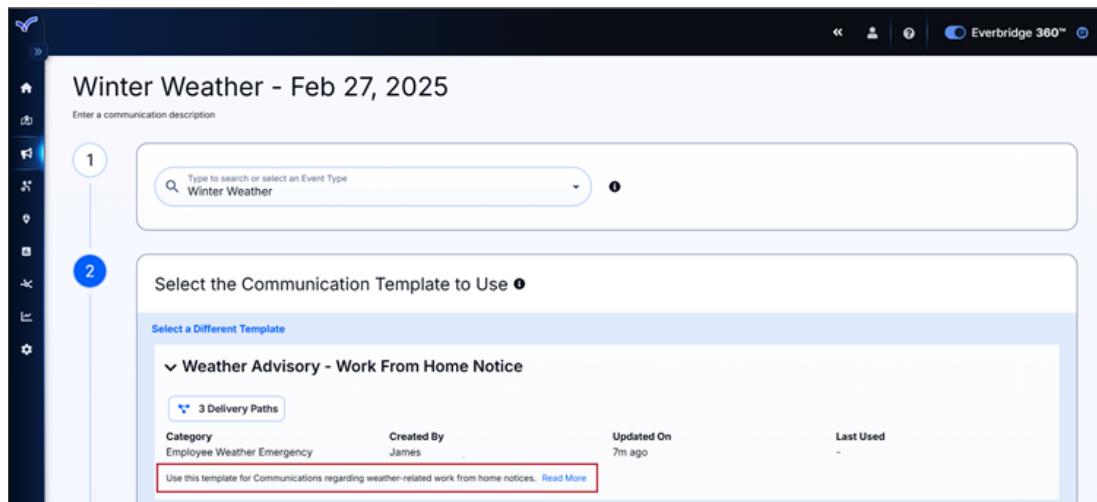
4. Optionally, click **Select Category** to choose the most appropriate Category for this template and click **Save**. Templates with assigned Categories will be grouped within their respective Category in the template library, while templates without a Category will automatically appear in the **Uncategorized** section within the template library.
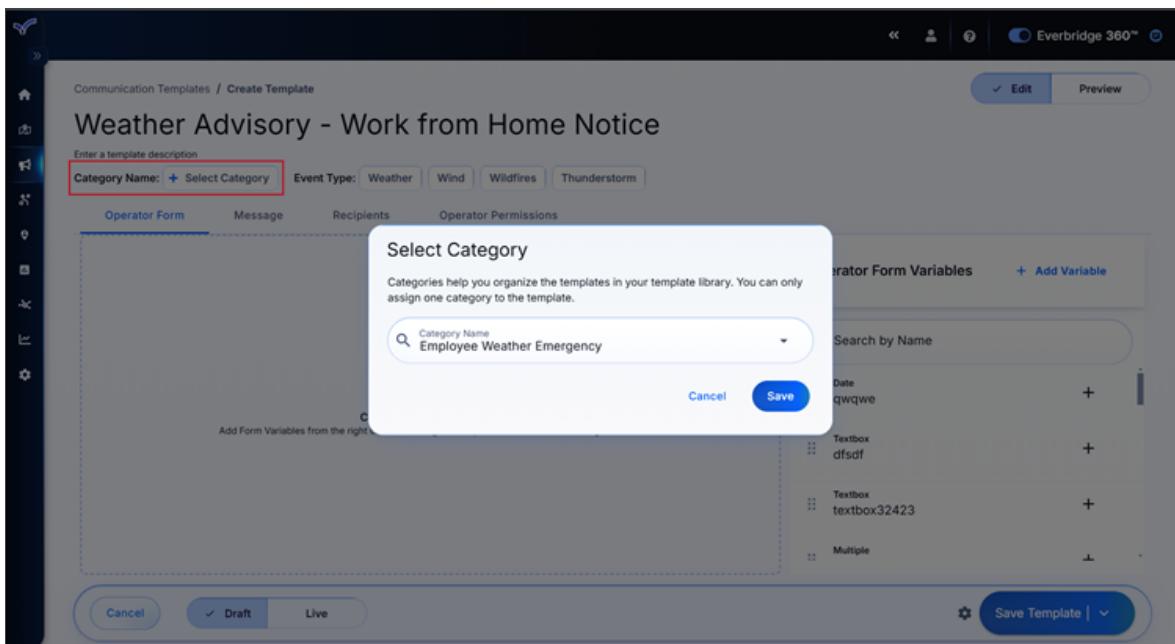
If none of the existing Categories are appropriate for this template, create a new one by typing it in the field and clicking **Save**. Once saved, the new or selected Category will appear beneath the Communication template's title. Click on it to edit it again.
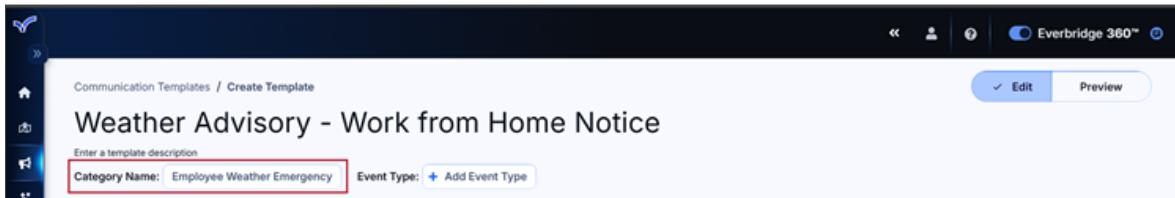
- Once the template is saved, Categories will appear in the Communications Templates Library as sections, as well as above the template name on the individual template tiles.
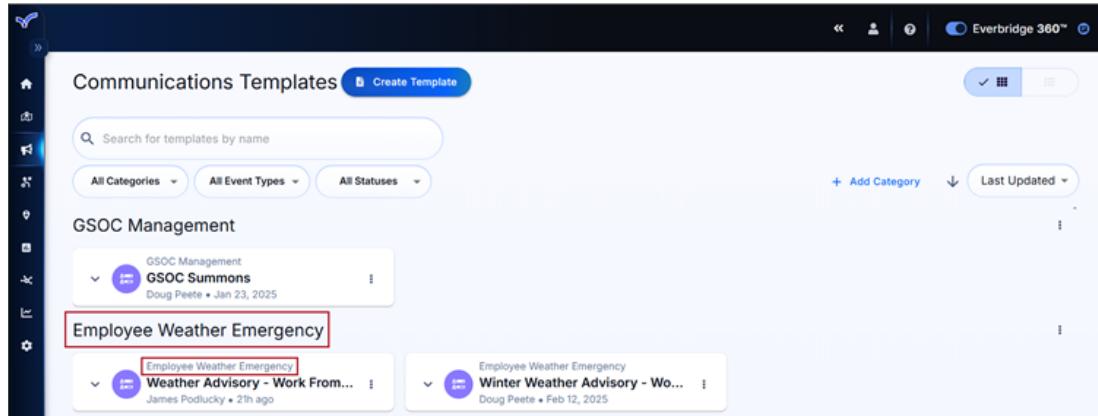
- Categories can be viewed, renamed, or deleted from the Communications Templates library by clicking the kebab menu icon for the desired Category. Note that when a Category is deleted, all of its templates will be moved to **Uncategorized**.

- A Communication template can only be assigned one Category.
- A template's Category can be changed or removed by editing it.
- Categories can also be created from the library by clicking **Add Category**.

5. If desired, click **Add Event Type** to assign an Event Type to this template from the dropdown menu, which will later be used to suggest templates when launching a Communication with the associated Event Type. There's no limit to the amount of Event Types that can be assigned to a template.

   If an Event Type was included by mistake, click the **X** on its chip in the **Add Event Type** modal to remove it.
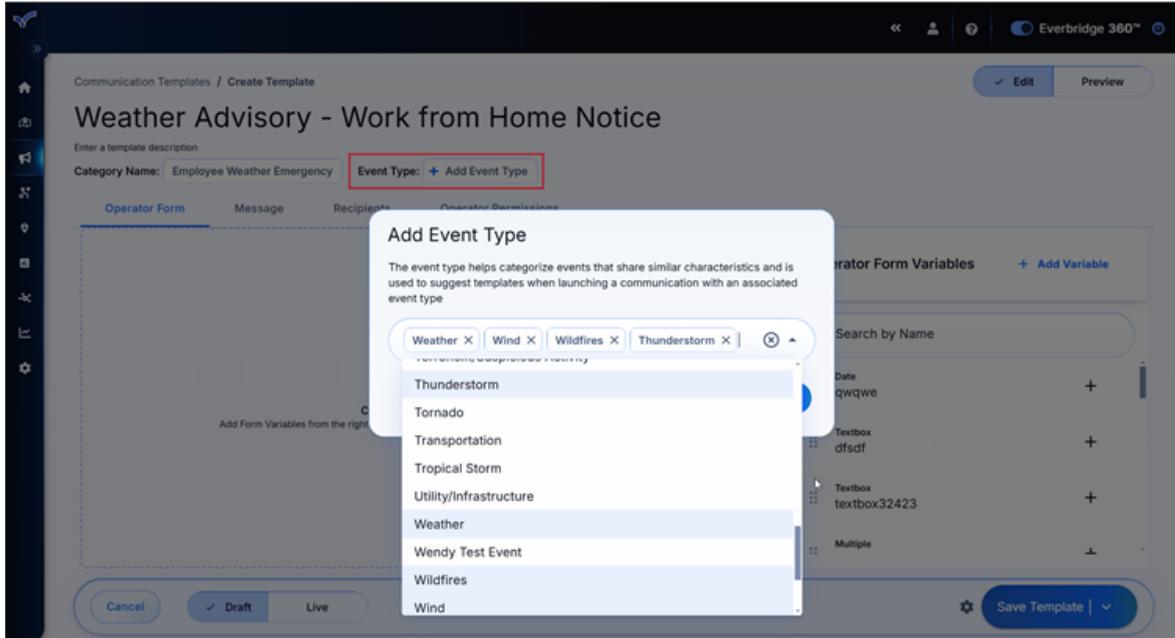
   After clicking **Save** in this modal, the selected Event Types will populate beneath the Communication's title. Click on them to edit the selections again as needed.
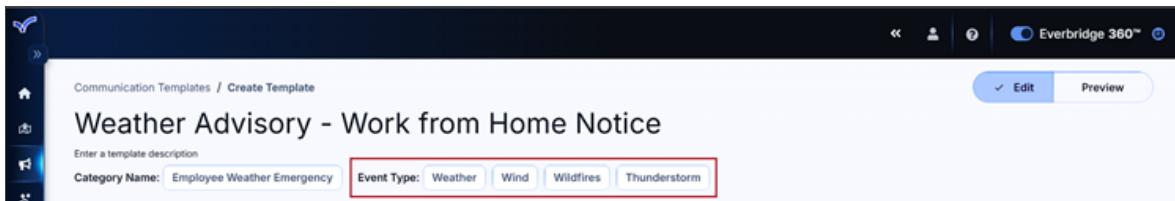
6. Scroll down to the **Operator Form** section to add the necessary Operator Form Variables. To do this, either:

- Choose from the list of existing variables and click the plus sign, or drag the desired variables into the Operator Form.
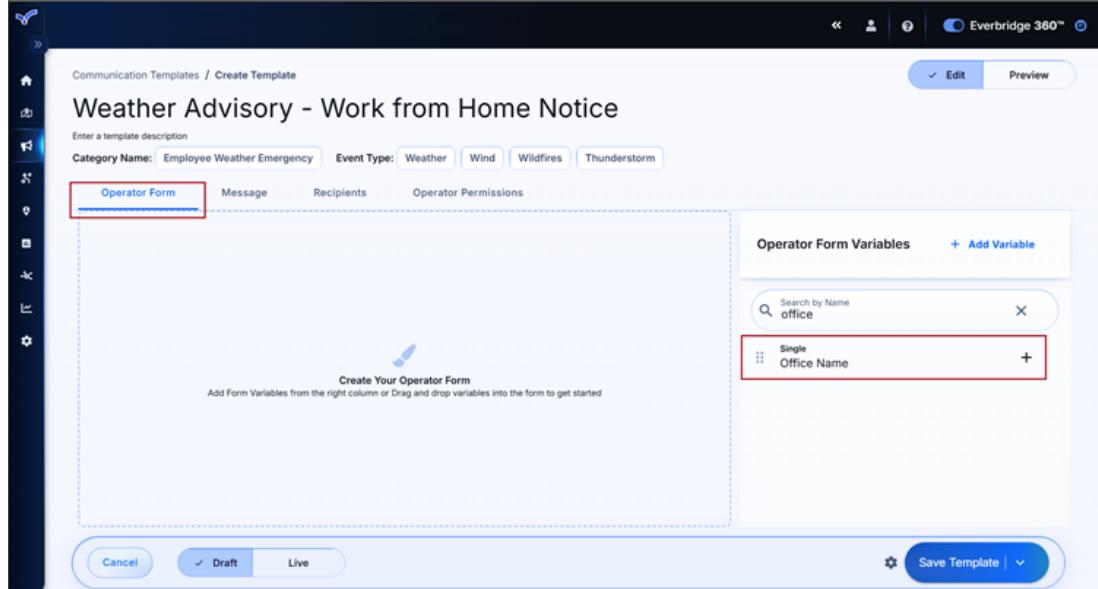
- Click **Add Variable** to create a new variable. Note that variables can also be added from the Variable Library. See [Creating Communications Variables](#) for more details.
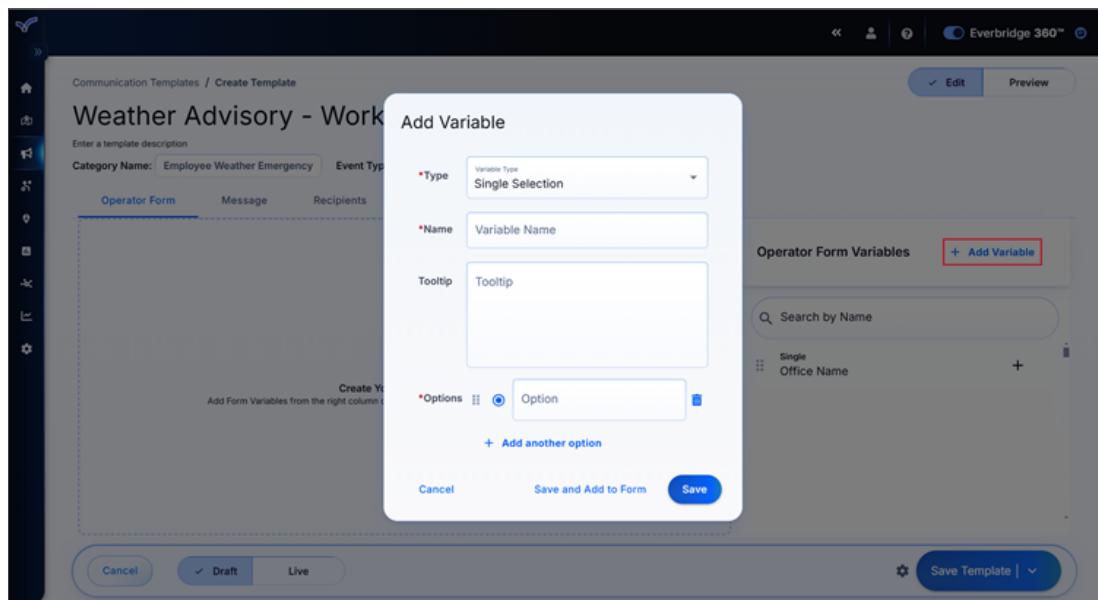
Click **Save and Add to Form** after naming the variable and choosing from one of the following variable types:

- Single Selection

- Multiple Selection

- Text Box

- Textarea

- Date

- **NOTE**: Clicking **Save** will only add the variable to the Variable Library.

7. Once a variables have been added, if desired, select a response to set it as a predefined value to be used during the Communication launch.
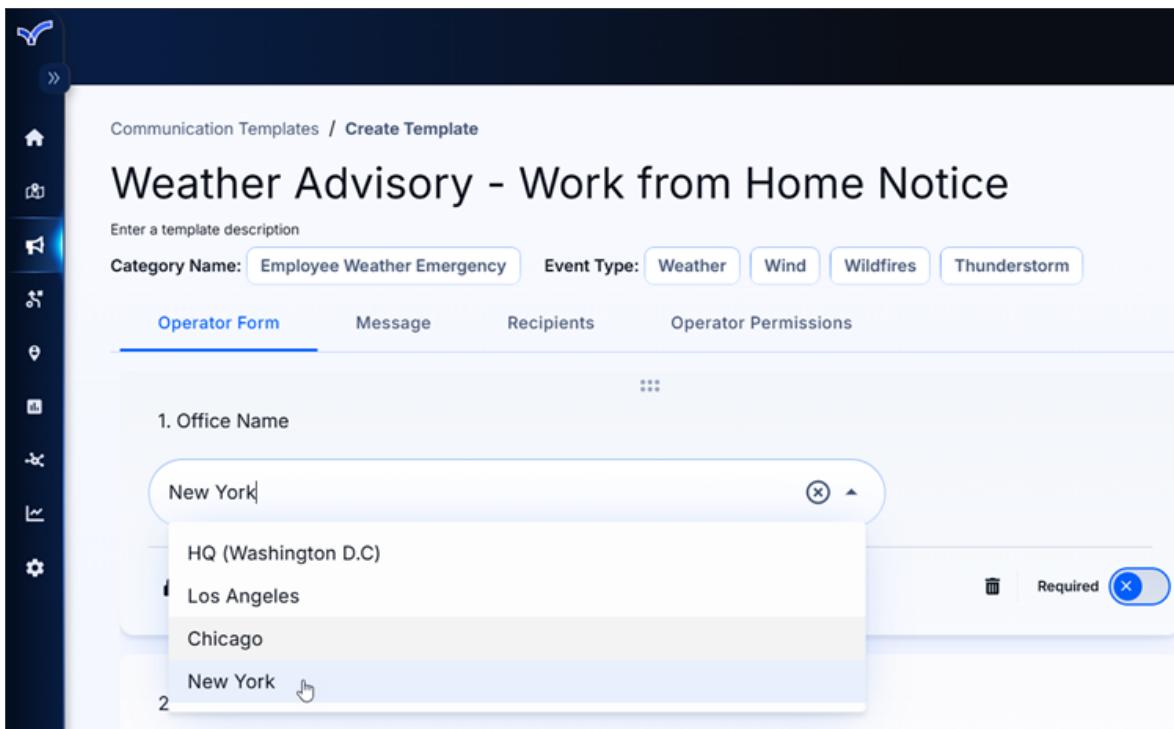
Hover over a variable to reveal additional actions.
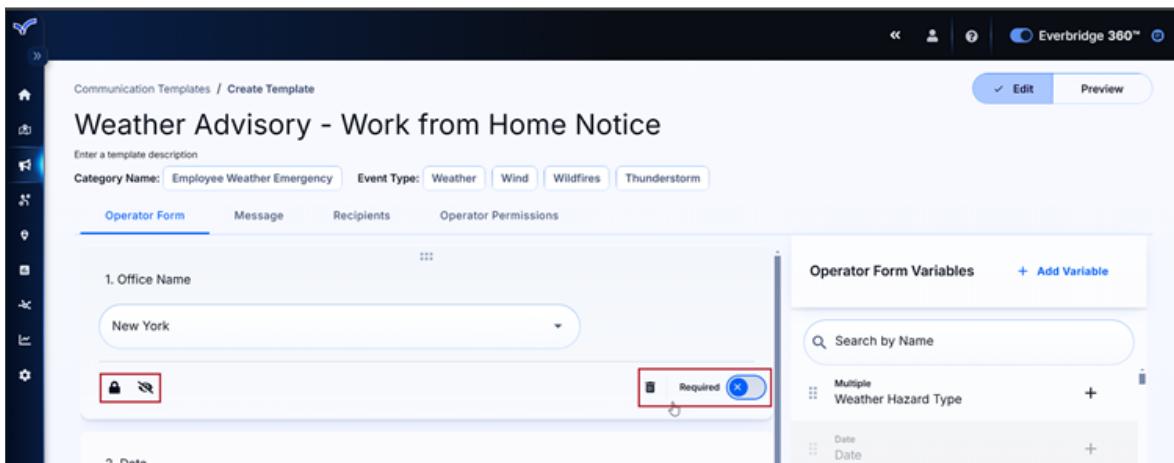
Click the corresponding icon to:
- **Lock Variable** - If a specific variable value has been defined (such as "New York" in the screenshot above), the selected answer will be preselected in the Operator Form during launch. It'll be visible for reference but not editable. Locked variables are denoted by the **Locked** icon next to their names. Click the **Unlock Variable** icon to unlock the

variable again as needed.
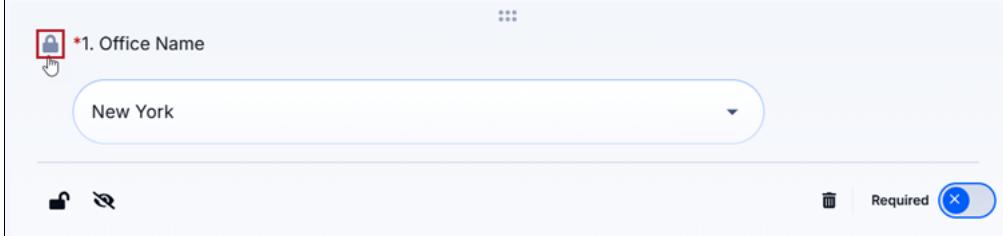
- **Hide Variable** - If a specific variable value has been defined, the value will be hidden in the Operator Form during launch but still appear in the sent Communication. Once applied, the **Hidden** icon will appear next to the variable's name. Click the **Show Variable** icon below to show it again as needed.
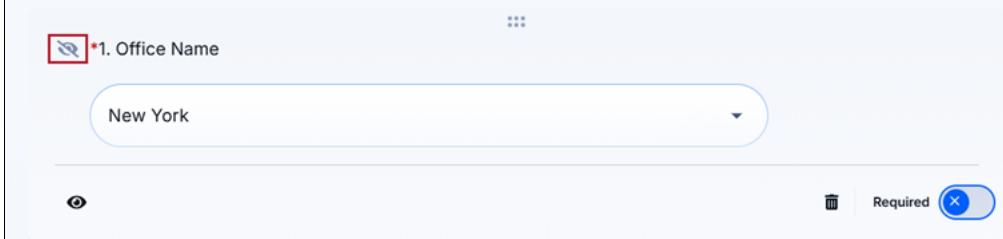
- **Delete Variable** - Removes the variable from the form. It can be added again as needed.
- **Mark Variable as Required** - Requires that this variable be completed in order to launch the Communication.

8. Once the Operator Form is finished, click the **Message** tab to configure the template's message(s). This tab contains critical configuration options that determine how Communications will be delivered, what content they will contain, and what options are available to operators during launch.
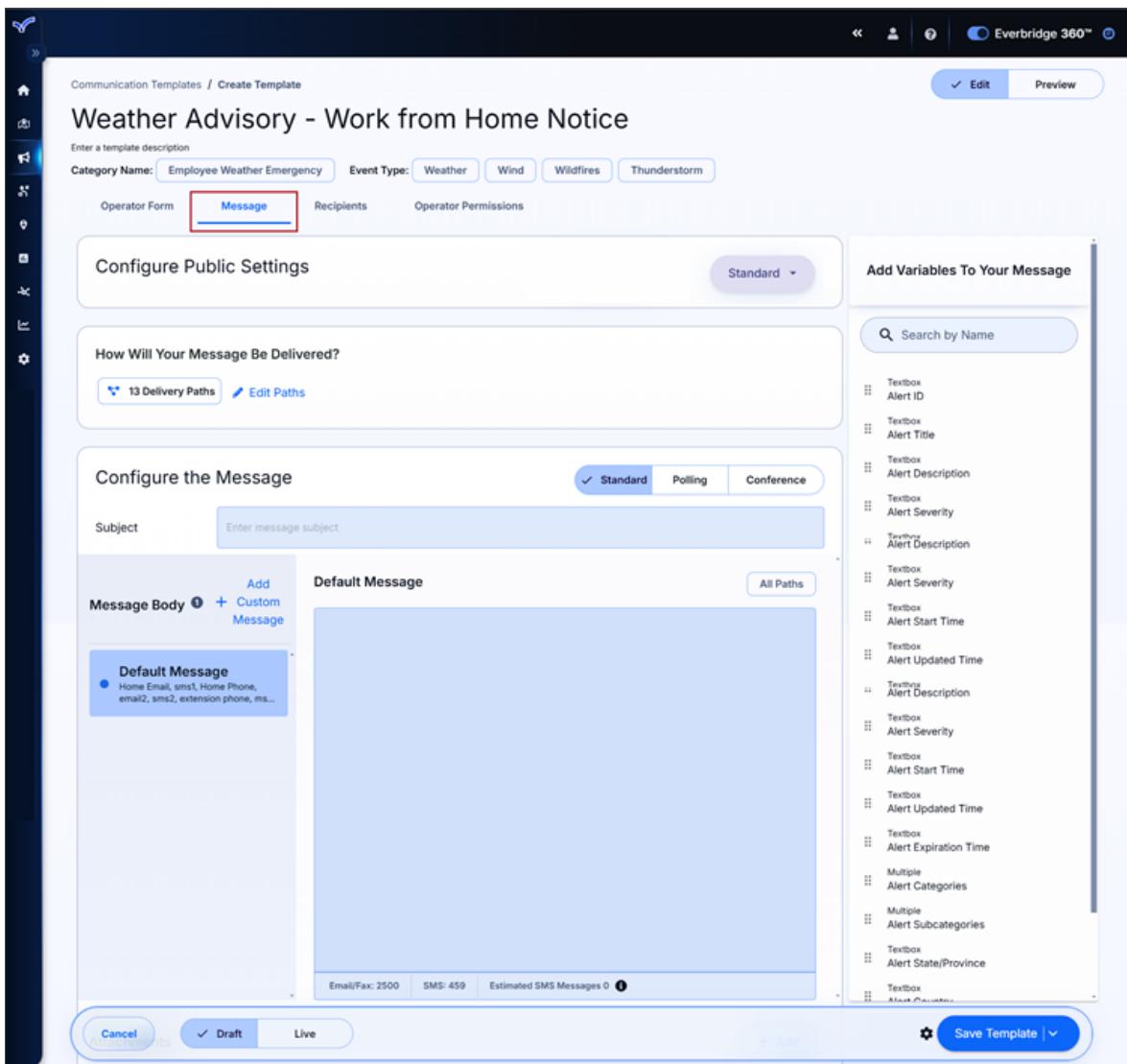
- For the **Configure Public Settings** section, choose one of the below priorities:


  - Standard
  - High Priority
  - Threat to Life
- Click **Edit Paths** under **How Will Your Message Be Delivered?** to set the Delivery Paths and Publishing Paths for this template.

- The top section of the modal displays available Delivery Paths.
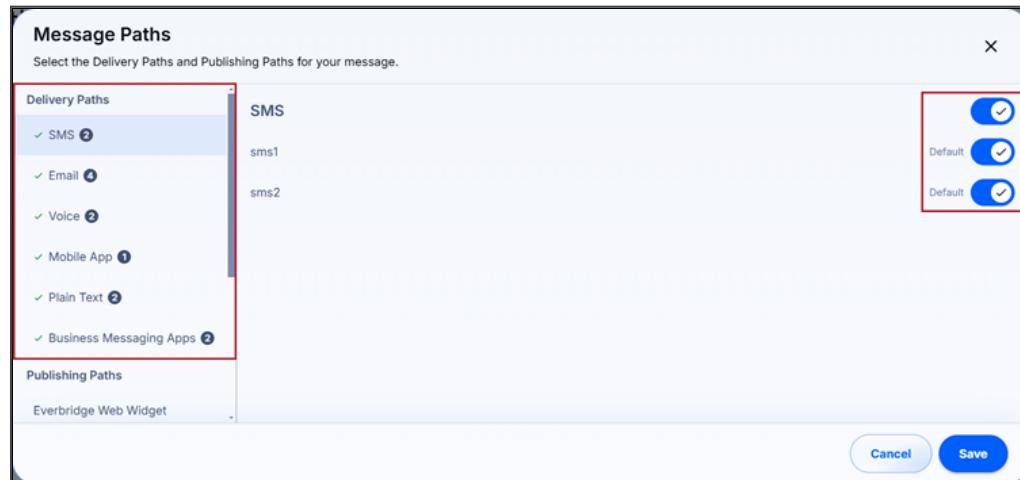
Choose paths from the following Delivery Methods:
- SMS
- Email
- Voice
- Mobile App
- Plain Text
- Business Management apps
- The bottom section displays available Publishing Paths.

Choose paths from the following Publishing Methods:
- Everbridge Web Widget
- Alertus
- Member Portal

- Social Media
- Everbridge Network
- Web Posting
- Audio Bulletin Board

- **NOTE**: Public Safety and government customers will instead see the Message Priority selector in the **Configure the Message** section.
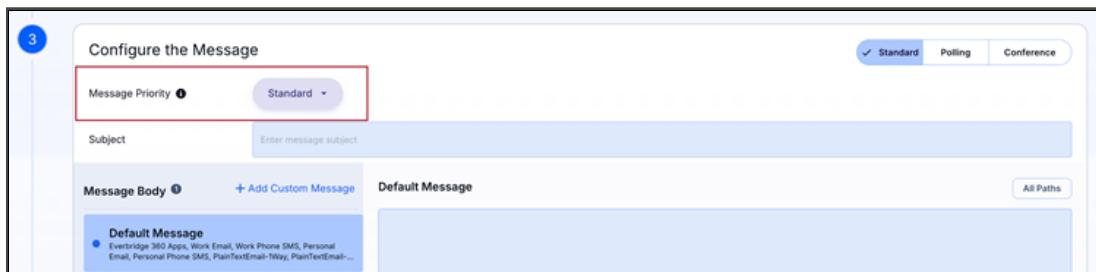
9. Scroll down to the **Configure the Message** and choose the Notification Type, which will update the available items in the form below.

- **Standard Message Type** - A standard message that doesn't include a poll or Conference Bridge.
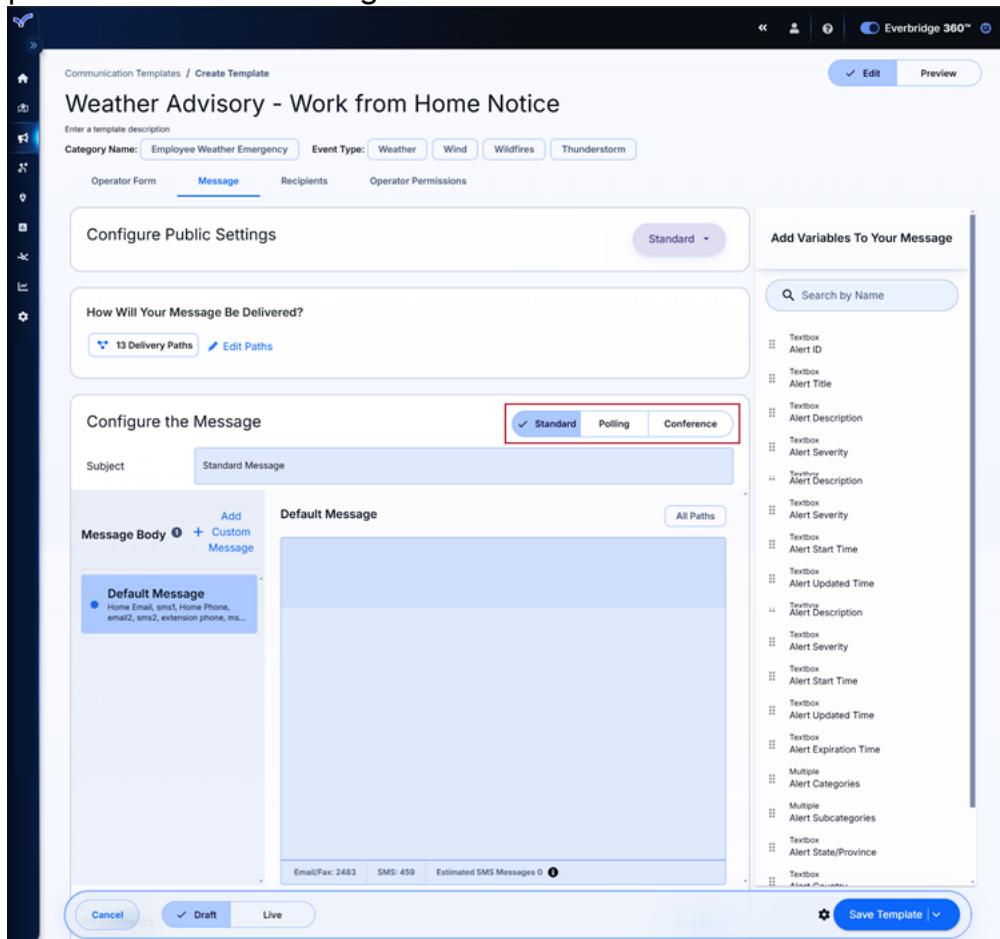
- **Polling Message Type** - Use this option to send a Polling Notification by adding as many Poll Responses as needed. Poll Responses are the answer options for your poll question, which is entered in the

Notification body as well as the Notification Reports. Recipients can select only one response.
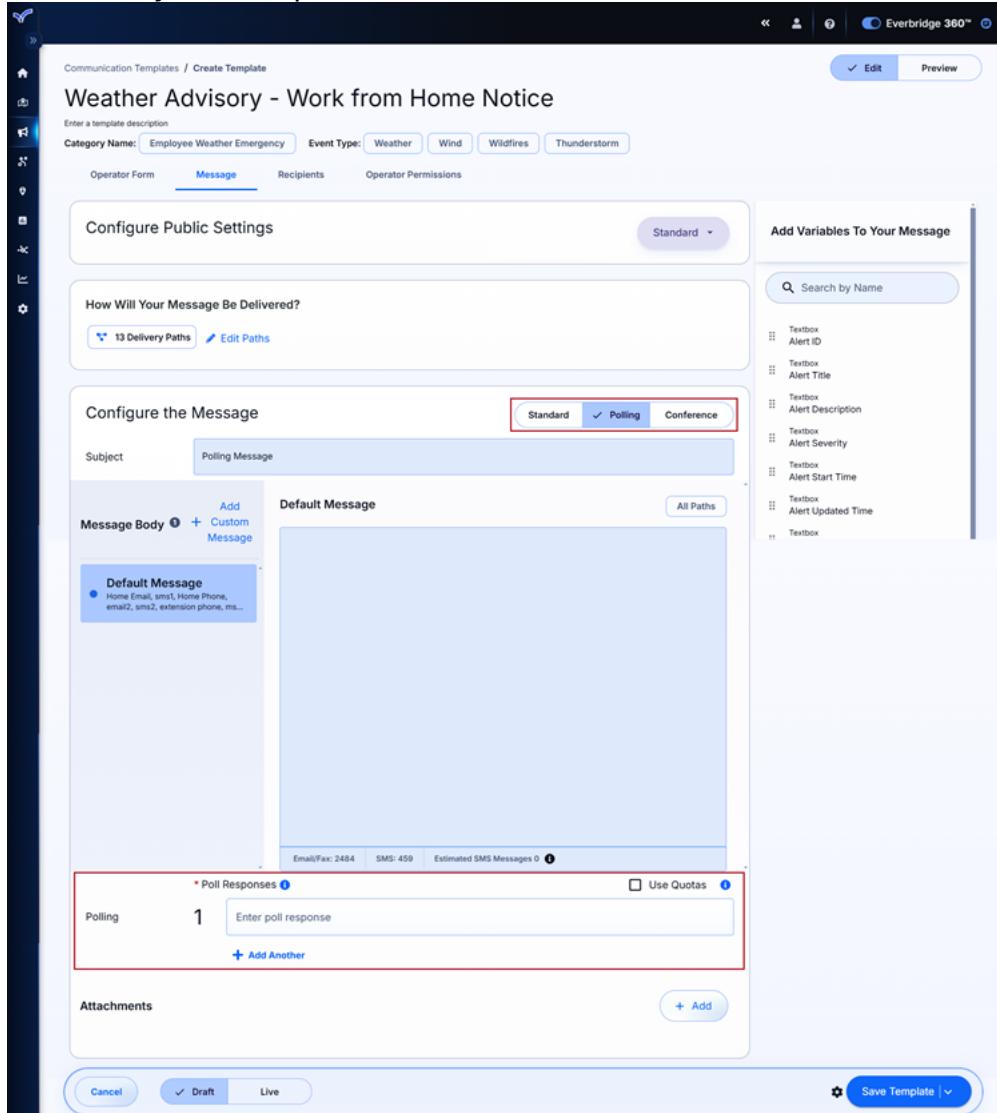
- Select the **Use Quota** checkbox and enter number in the quota field when you need a certain amount of replies for one or more responses.
- **Conference Message Type** - This option will prompt recipients to join a Conference Bridge. Everbridge Conference Bridge Notifications can support up to 96 contacts, while Custom Conference Bridge and Smart Conference Bridge Notifications can support up to 250 contacts. Any Notification beyond 50 will be sent only when an earlier Notification

either expires or is stopped.
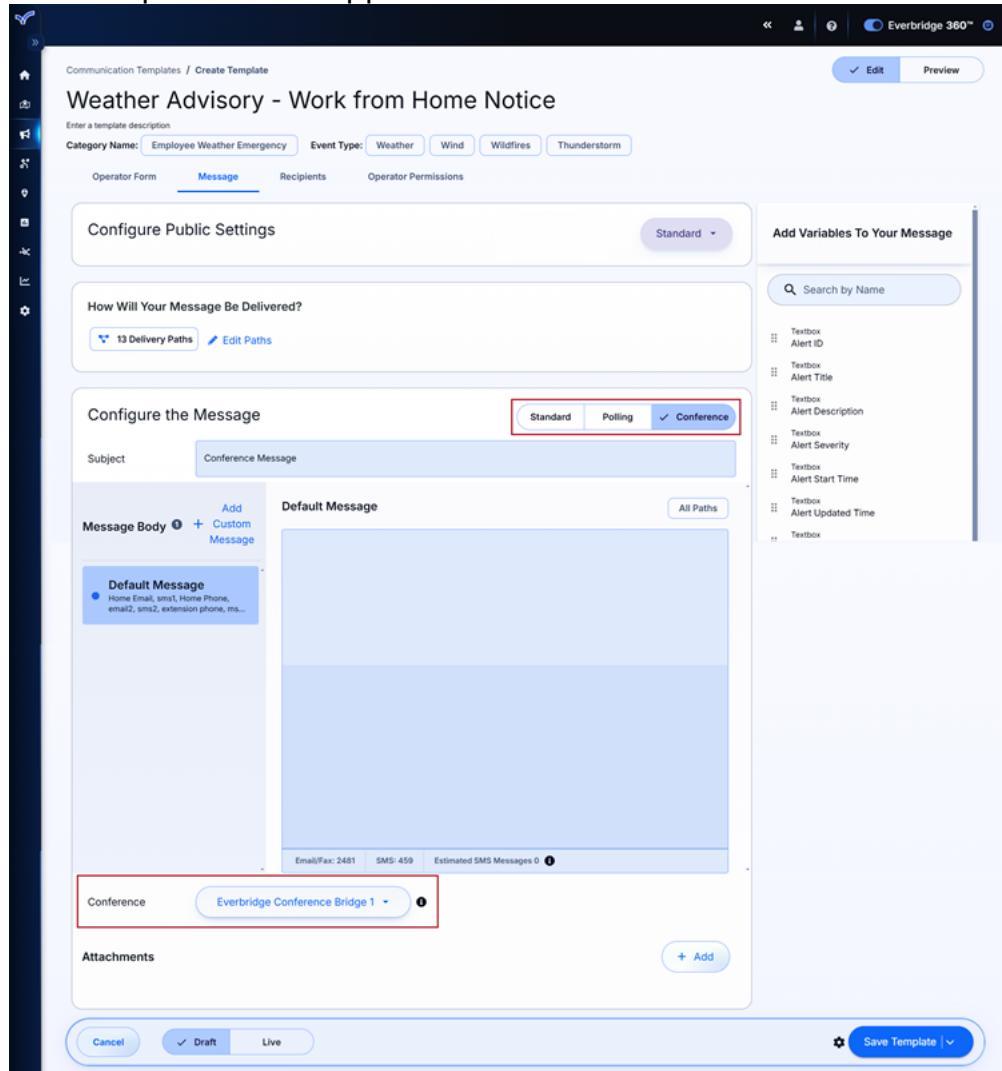
10. Enter the desired message in the **Default Message** field and drag the desired variables into place as needed. The included variables will appear in the message box in purple.
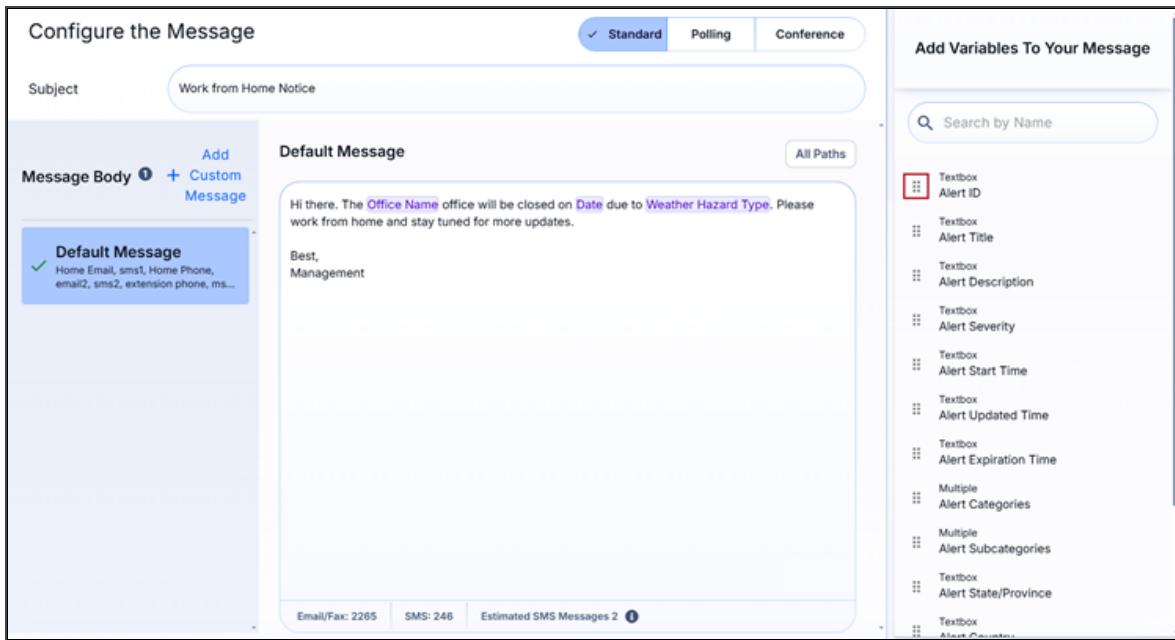
Keep the following conventions in mind when crafting a Standard type Default Message:

- SMS messages will not exceed three message segments.
- SMS messages will not exceed the standard 459 character (three SMS segments).
- SMS messages containing non-GSM-7 characters will not exceed 201 characters (3 SMS segments).
- This limit will include any auto-generated text (e.g. Confirmation Instructions, Short URL, etc.).
- Messages longer than the limit will include a link to the SMS Web Page Message.

11. If desired, click **Add Custom Message** to craft messages specific to certain message paths, such as SMS, Email, Voice, etc. Make the selection(s) and click **Save.**
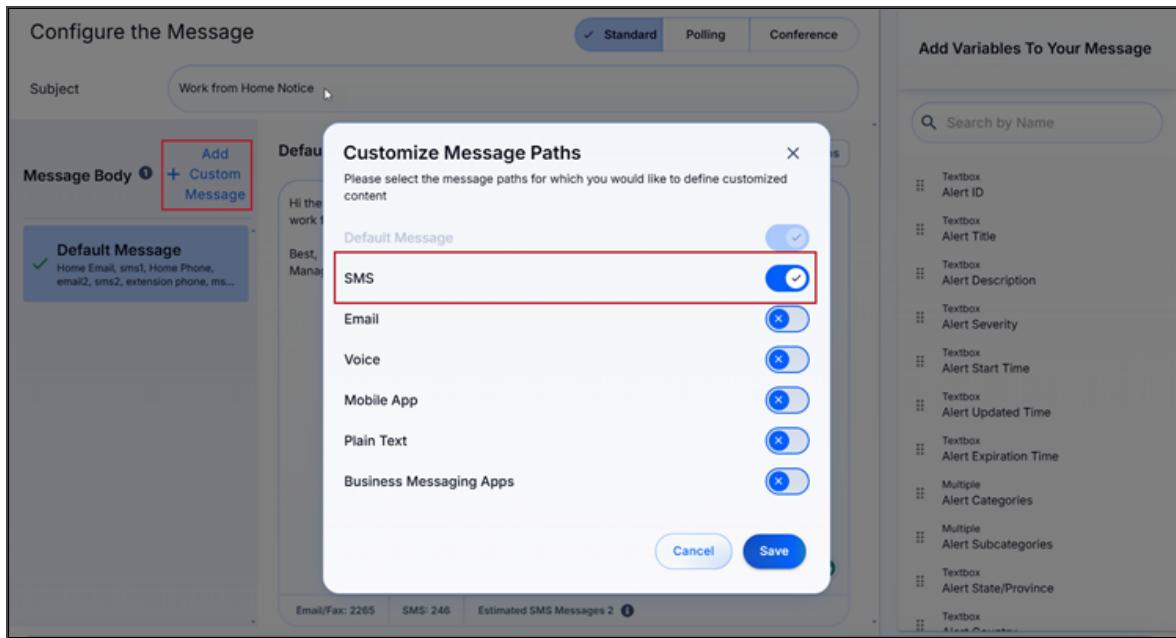
- Once saved, note that the **Paths** section above the **Default Message** field will now display all of the paths except for those selected on the **Customize Message Paths** page. Instead, the selected path will have its own subsection under **Message Body** to the left.
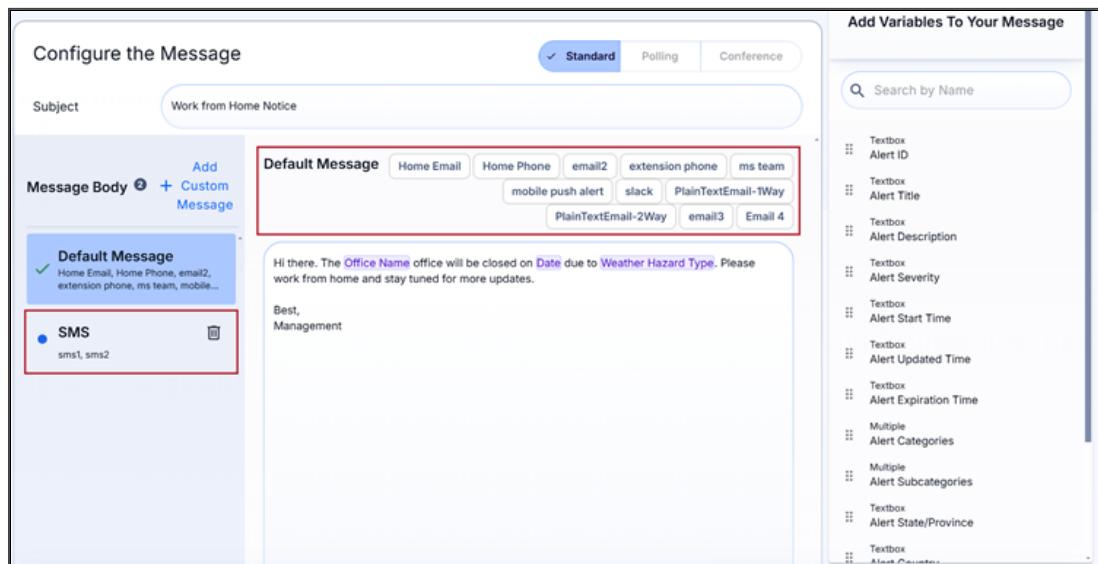
Click it to configure the custom message for the chosen path.
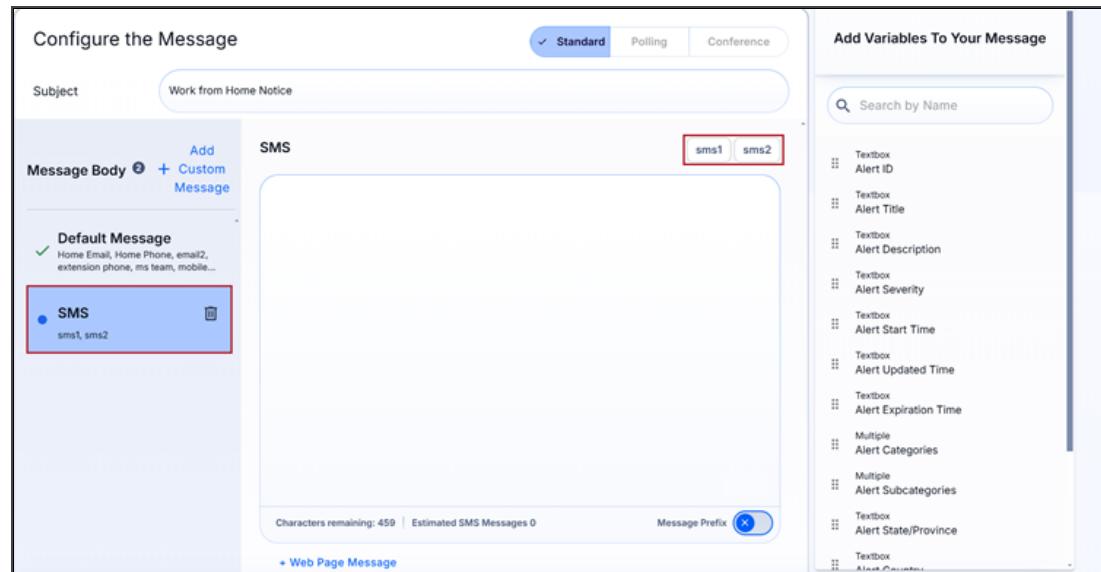
Repeat this process as needed for each path that needs a custom message.

- Paths can be removed by clicking the trash icon next to their name from the **Message Body** section.

12. Continue to the **Attachments** section and click the **Add** button to upload up to five attachments to be sent via supported message paths. Files can either be selected by browsing the device or by being dragged and dropped into the modal. Individual files can be up to 5MB each for a maximum of 20 MB per template.

Click **Attach** once the files are selected.
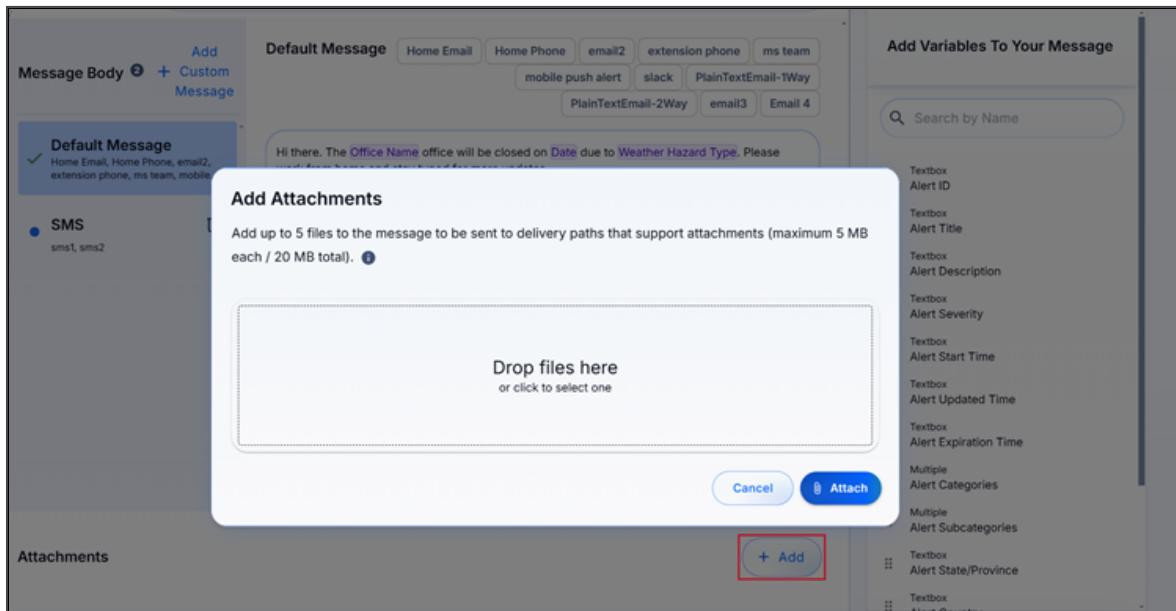
Once attached, the files will populate under the **Attachments** header. If

needed, click the **X** next to the file to remove it from the message, or click **Add** to attach more files.
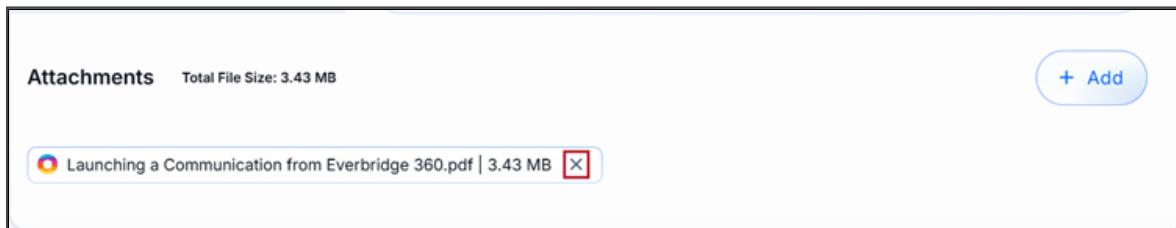
13. After the **Message** tab is finished, click the **Recipients** tab to select recipients via Groups, Individuals, and/or Rules. This selection process mirrors that of [Step 5: Recipient Management](#) of the Launch Communication workflow, so refer to that section for more details.
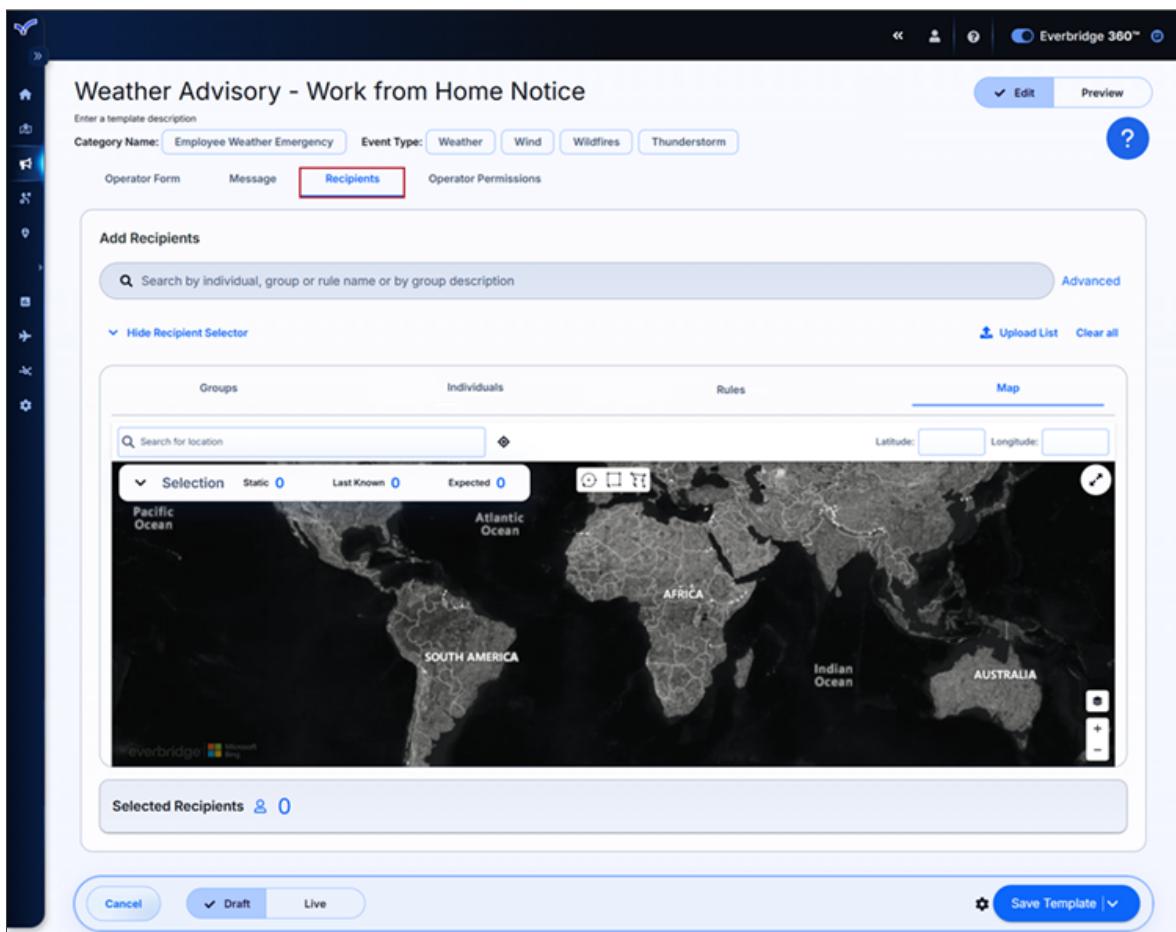
- If desired, click the **Show** or **Hide Recipient Selector** to customize the view of this page to reveal or collapse the list of recipients.
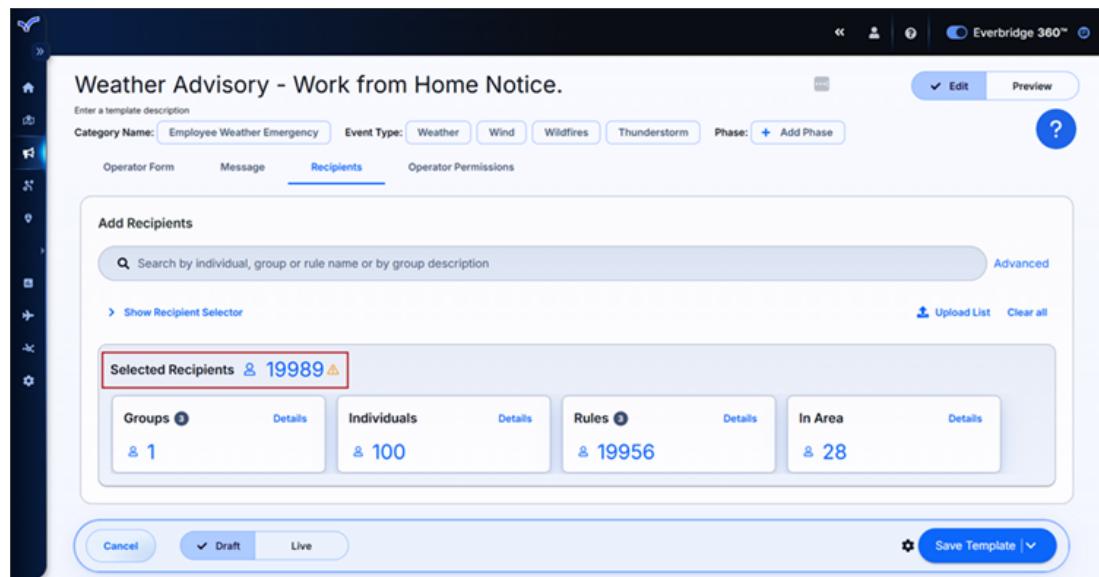
- Click **Clear All** to clear any selections that have been made and start the recipient selection from the beginning. Note that this option will only appear if selections have been made.
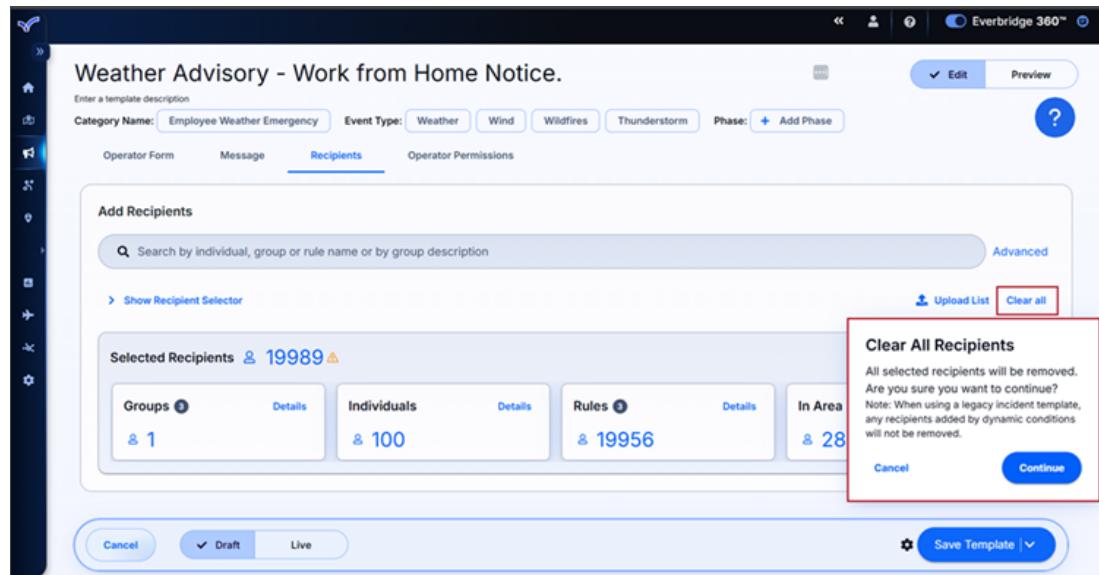
14. Click the **Operator Permissions** tab to configure and control what operators can view and edit when using this template to launch Communications.
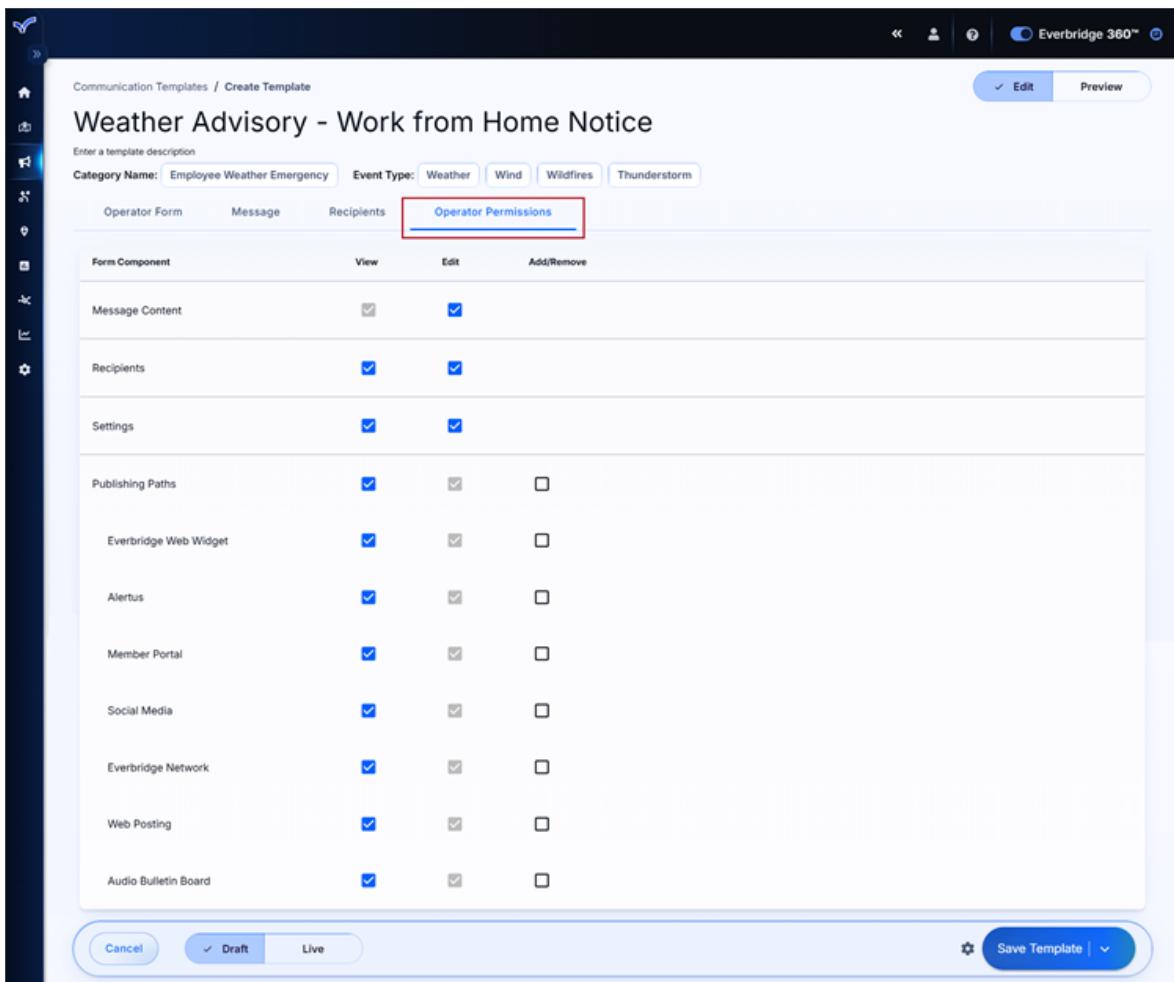
The page is broken into three permission columns: View, Edit, and Add/Remove.

- **View** - Allows operators to see the message content, selected recipients, settings, and publishing paths.
- **Edit** - Allows operators to modify the message content, recipient selections, settings, and publishing paths.
  - **Edit** permissions require that the corresponding **View** permission is enabled.
- **Add/Remove** - Allows operators to add or remove publishing paths.

15. Click the **Settings** cog icon on the **Communications Toolbar** to configure Content, Delivery, Sender Information, and Recipient Interaction settings. When a template is selected when launching a Communication, its Settings selections will override the Organization's default settings.
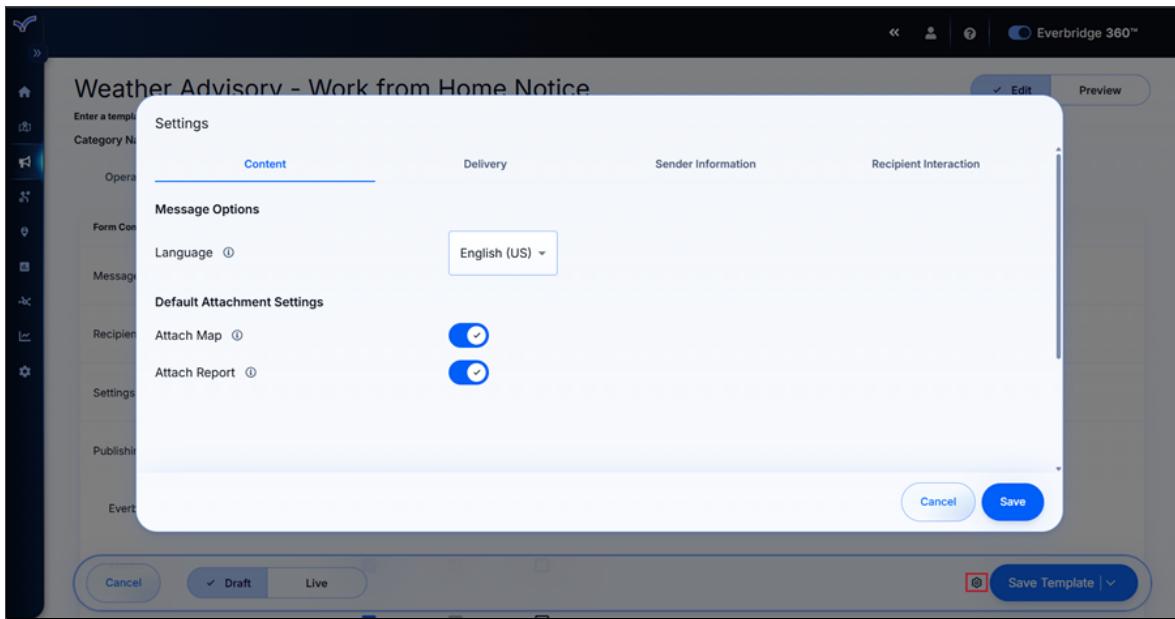
- **Content** - Configure the following as needed:
  - **Language** - Controls the language in which recipients will receive voice and email prompts, as well as the accent for text-to-speech messages. Note that this setting does not auto-translate any text entered.
  - **Attach Map** - Attach a map showing the impacted area to Communications launched directly from an Alert. For more details, see [Launching a Communication from an Alert](#).
  - **Attach Report** - When launched from an Alert, automatically attach a report to the Communication that summarizes the Alert and lists any Assets that may be impacted. For more details, see [Launching a Communication from an Alert](#).
- **Delivery**, **Sender Information**, and **Recipient Interaction**: These processes mirror [Step 6: Settings](#) of the Launch Communication flow, so refer there for more details.

16. Choose what state this template should be saved in between either **Draft** or **Live**. Live templates will be usable immediately, whereas drafts will be saved to be completed later.

17. Click **Save Template**. Optionally, click the downward arrow on the **Save Template** button to save and duplicate this template.

Communication Plans

Communication Plans enable organizations to create and execute pre-defined, multi-phase Communication workflows for complex and time-sensitive scenarios. Instead of sending individual messages manually, users can launch a Communication Plan to deliver coordinated Communications across **Initial**, **Update**, and **Close** phases, ensuring messages are sent in the correct order and at the right time.

By organizing multiple Communication Templates into a structured workflow, Communication Plans help teams respond quickly and consistently during emergencies while reducing the risk of missed or incomplete Communications. This makes them ideal for:

- System maintenance notifications
- Emergency evacuations
- Severe weather events
- Facility incidents and safety events
- Any situation requiring coordinated Initial, Update, and Close Communications

Communication Plans fit into the broader messaging ecosystem as follows:

- **Standard Communications** – Single, standalone messages sent ad hoc.
- **Communication Templates** – Reusable message content that includes recipient selections and settings.
- **Communication Plans** – Structured, multi-phase workflows that coordinate multiple Communication Templates.

User Permissions

Menu items, buttons, and options will only appear for users when their assigned User Roles have the following permissions and dependencies:

- **View Communication Plans** - Allows users to view existing plans.
- **Create Communication Plans** - Allows users to create new plans.
  - Requires **View Communication Template**.
- **Edit Communication Plans** - Allows users to modify existing plans.
  - Requires **View Communication Template**.
- **Delete Communication Plans** - Allows users to remove plans.

- Requires **View Communication Template**.
- **Launch Communication Plans** - Allows users to execute plans to send Communications.
    - Requires **Create Communication** AND **View Communication Template**.

> **IMPORTANT:** Communication Plans permissions **are not** supported for Legacy Roles. Users assigned Legacy Roles will not have access to Communication Plans features. To use Communication Plans, Organizations must first migrate users to Custom Roles.

Communication Plans Library

An Organization's Communication Plans can be found and managed from the **Communication Plans Library (Communications > Everbridge 360 > Communication Plans)**.
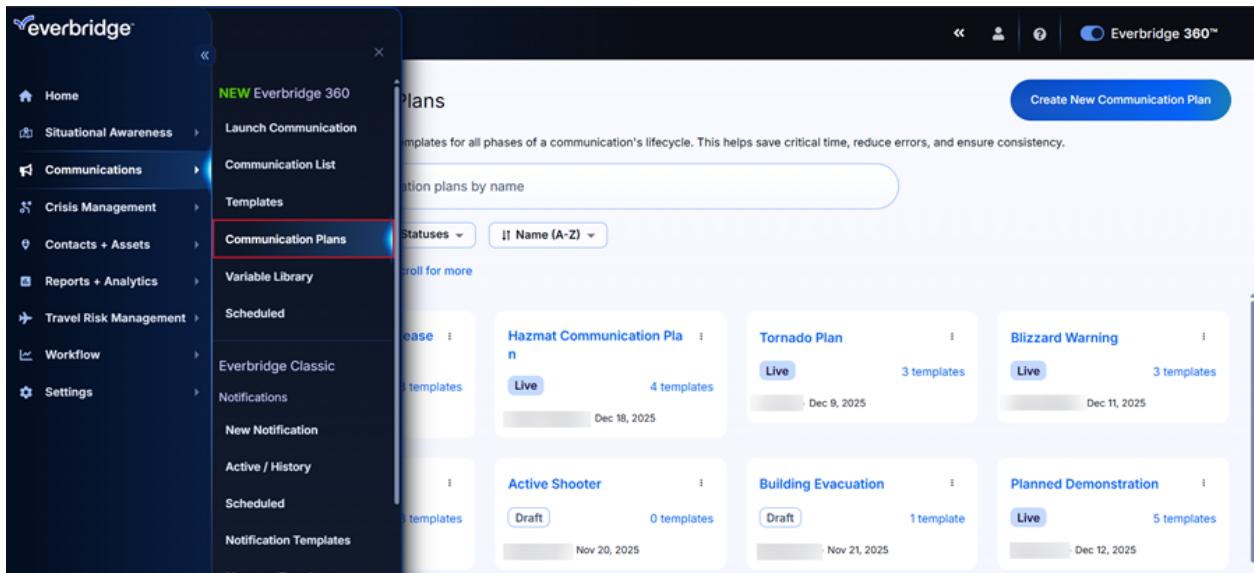
> **NOTE:** See [Managing Communication Plans](#) and [Launching a Communication Plan](#) for more on the actions that can be taken from this page.

Navigating the Communication Plans Library

Each Communication Plan in the list will include the Plan Name, Status (a blue **Live** chip or a white **Draft** chip), name of its creator, when it was created or last updated, and a count of the Communication Templates it contains by phase.
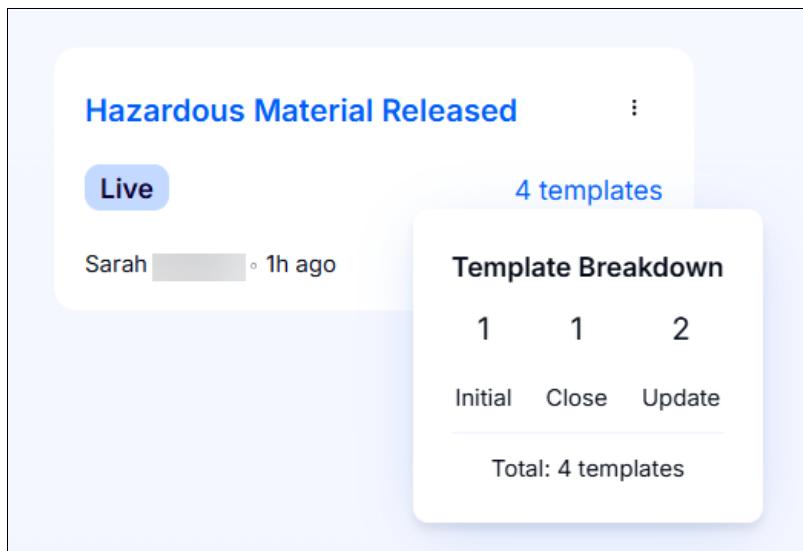
Searching and Filtering

The Communication Plans Library can be easily navigated by searching for plans by name (supports partial and case-insensitive queries), filtering by **Event Types** or **Status** (All, Live or Draft), and sorting by **A-Z**, **Z-A**, or by **Last Updated**. Multiple search filters can be applied, which uses AND logic.
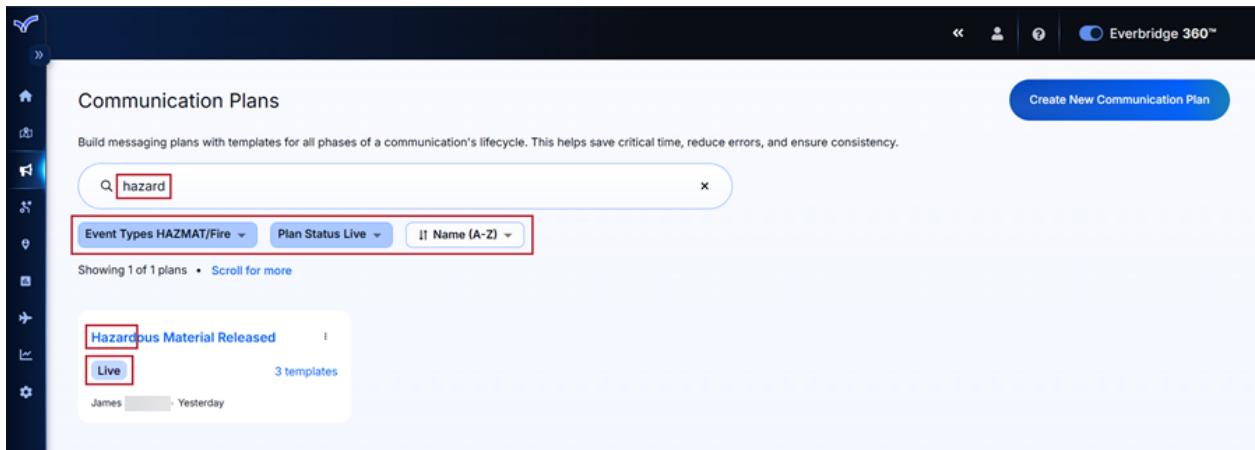
If no results are found, the user will be prompted to adjust their query and try again.
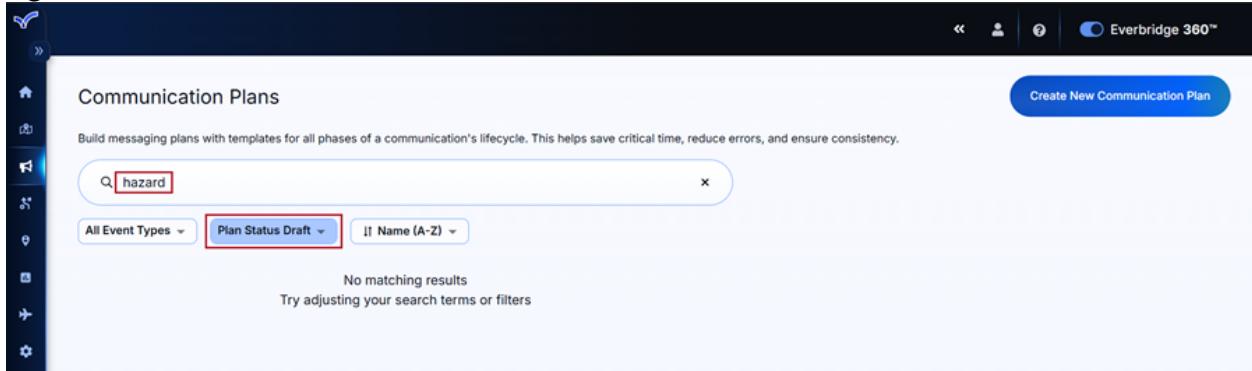
Filters and searches can be cleared by:

- Clicking **Clear All** in the filter dropdown menus or manually deselecting the checkboxes as needed.
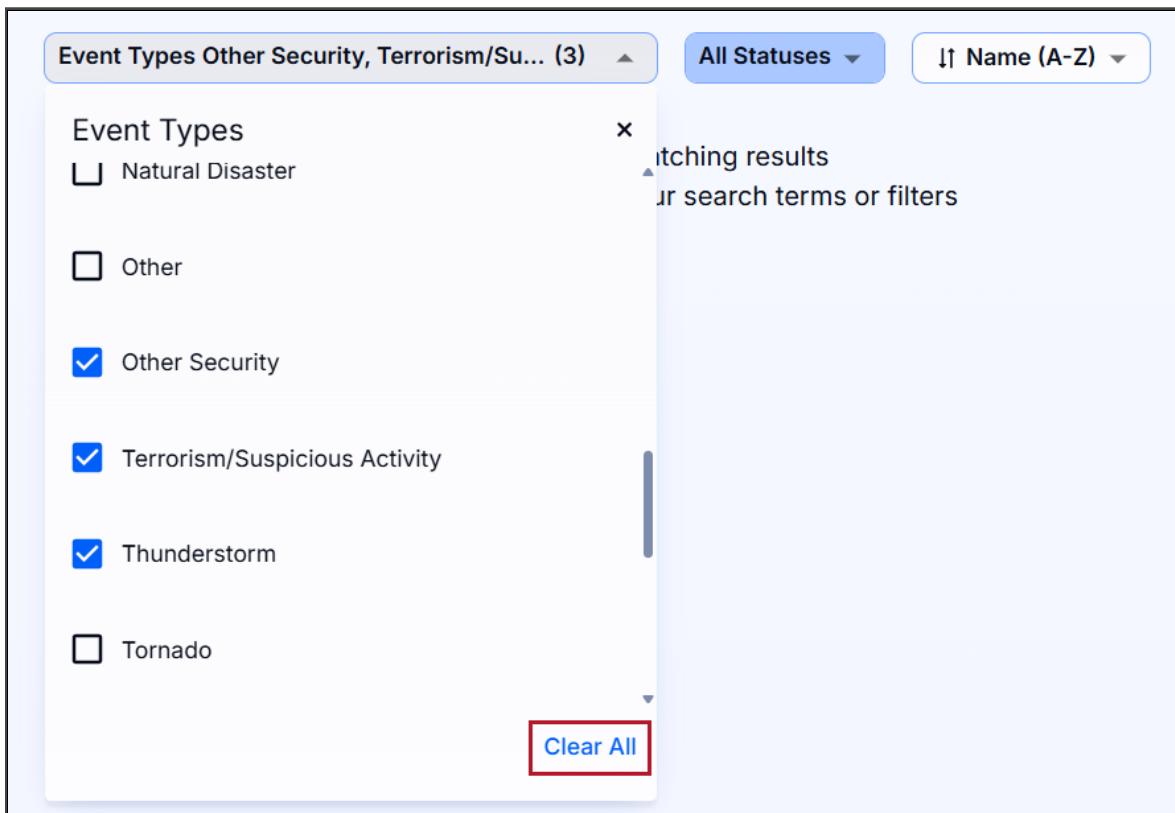
- Clicking the **X** button in the **Search** field.

Creating a Communication Plan

Users can create new Communication Plans directly from the **Communication Plans Library**. To create a new Communication Plan:

1. Click **Create New Communication Plan** in the top-right corner.
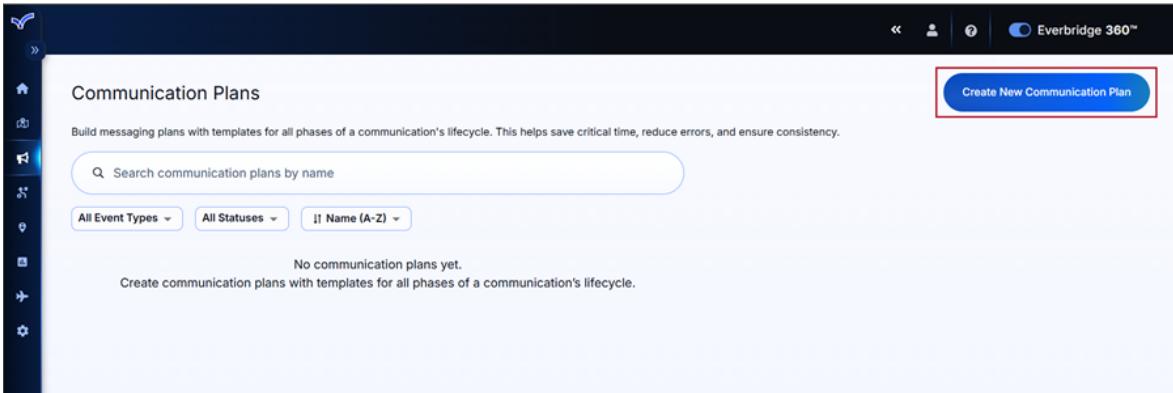
2. The **Communication Plan Builder** will open to the first step: **Plan Details**. Add the plan's basic details in the **Plan Details** section, including a unique **Plan Name** (up to 100 characters), optional **Plan Description** (up to 500 characters), and any applicable **Event Types**.
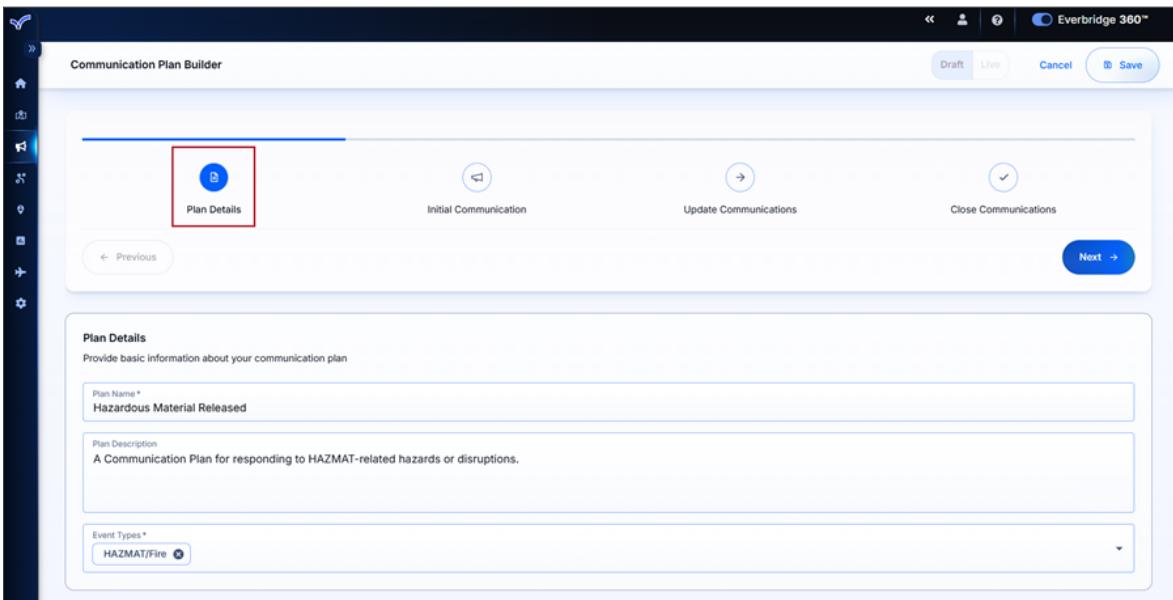
- **NOTE:** While the **Plan Description** is optional, **Plan Name** is a required field, and at least one Event Type must be selected.

3. Click **Next** to proceed to the **Initial Communication** step, then select the Communication Template to be triggered during the **Initial** phase. To find a

template, search by name or filter the list by Event Type. Once selected, the dynamic **Plan Overview** panel to the left will be updated with the selection.
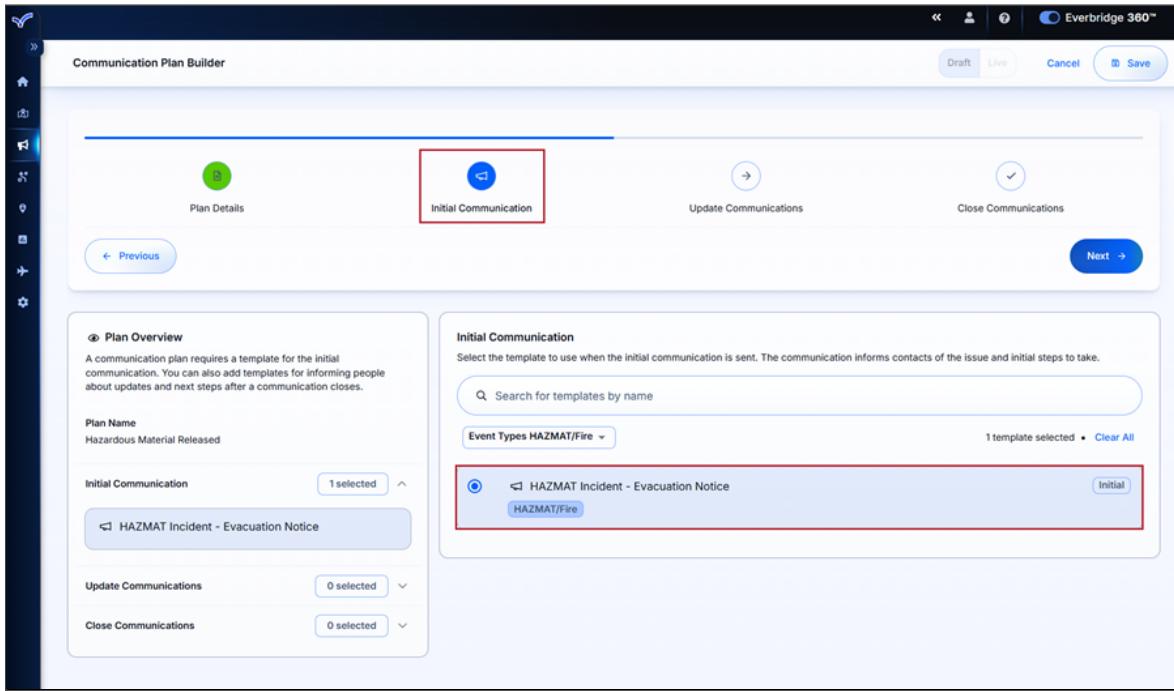
- The only templates that will be available for use are those tagged with the **Initial** phase. The same logic applies to the **Update Communications** and **Close Communications** phases and their respective template phases.
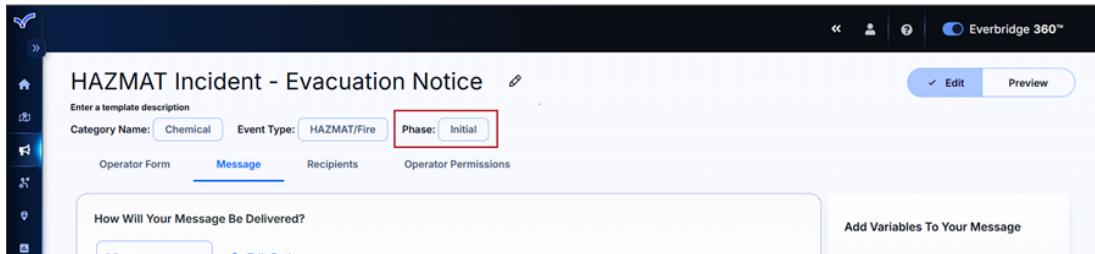
4. Click **Next** to proceed to the **Update Communication** step, then select the Communication Templates to be triggered during the **Update** phase. The **Plan Overview** panel will update accordingly.
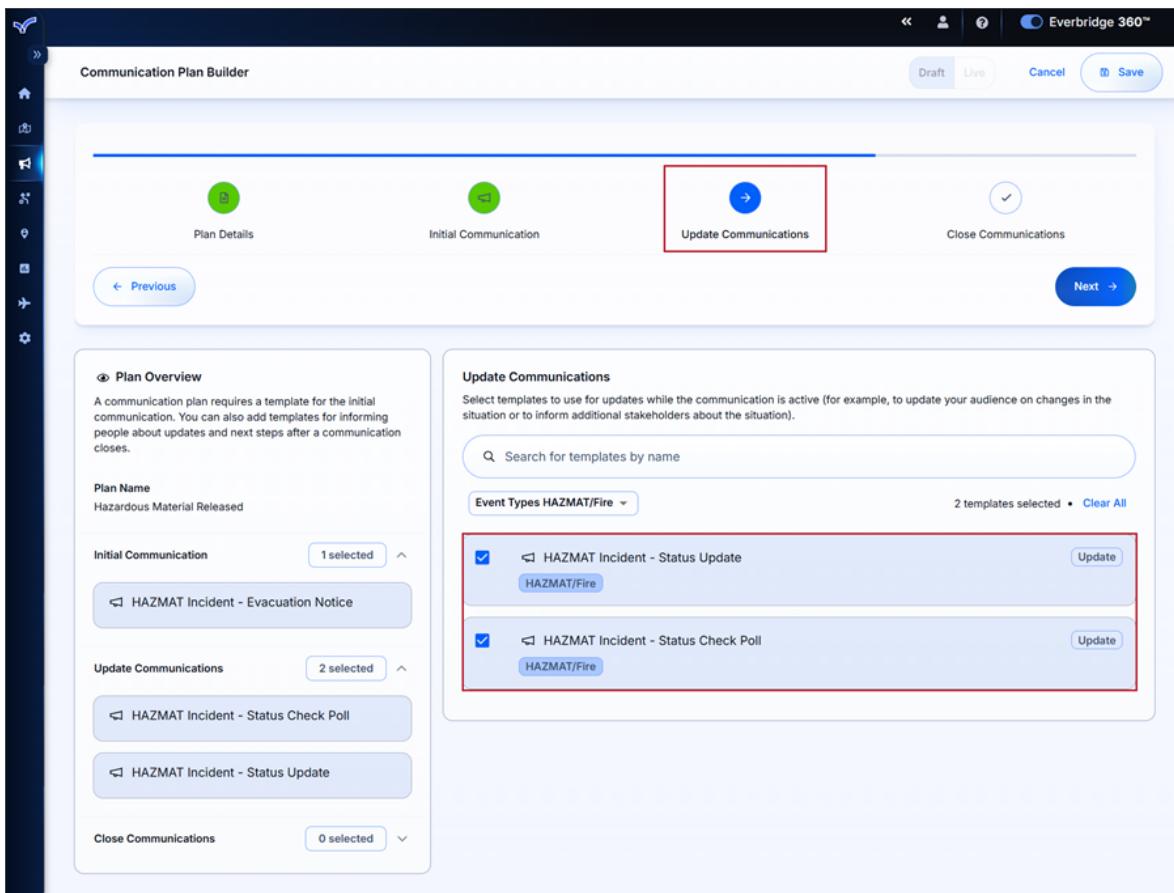
5. Click **Next** to proceed to the **Close Communication** step, then select the Communication Templates to be triggered during the **Close** phase. The **Plan Overview** panel will update accordingly.
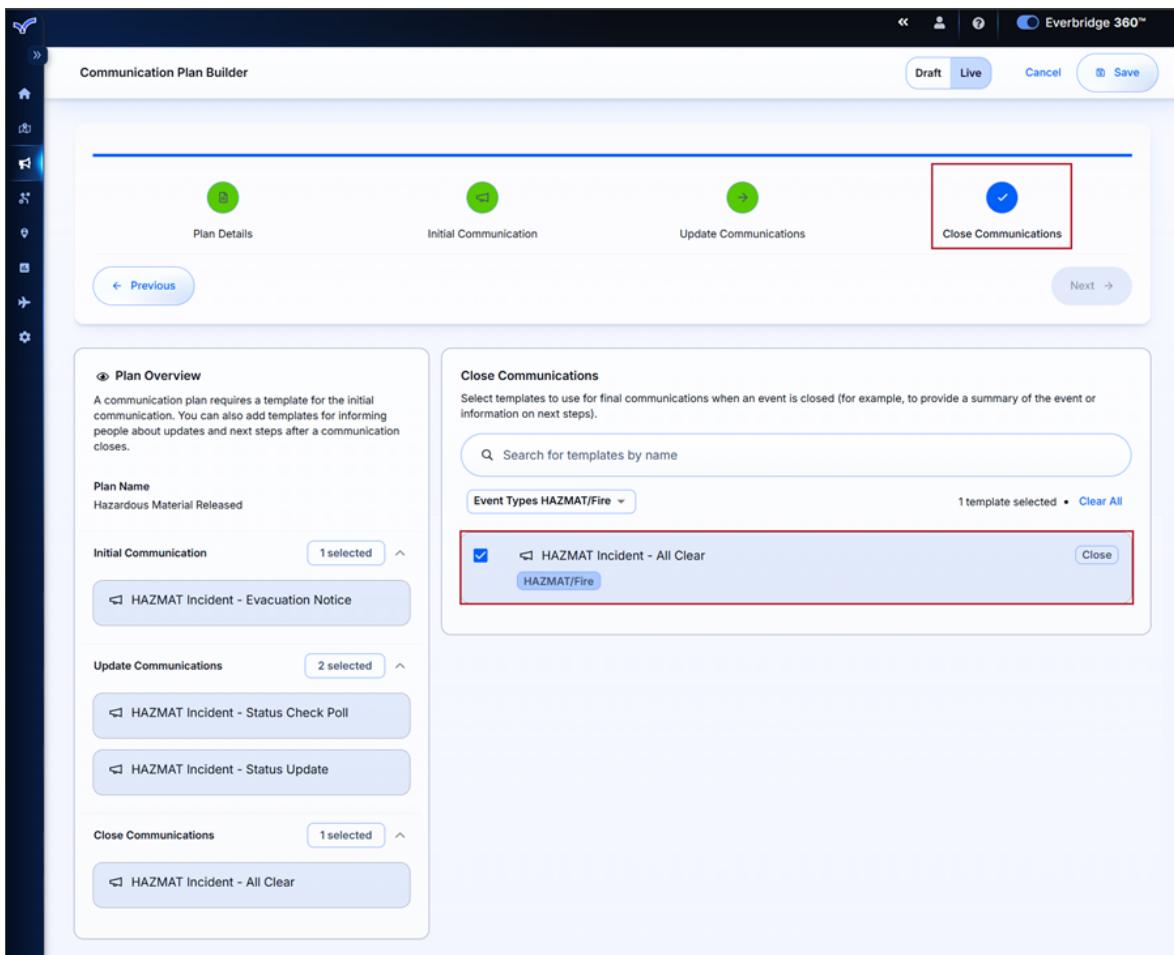
6. Set the plan's status to **Live** at the top of the page so that it will be immediately usable after saving, or leave it as a **Draft** to return to it later.
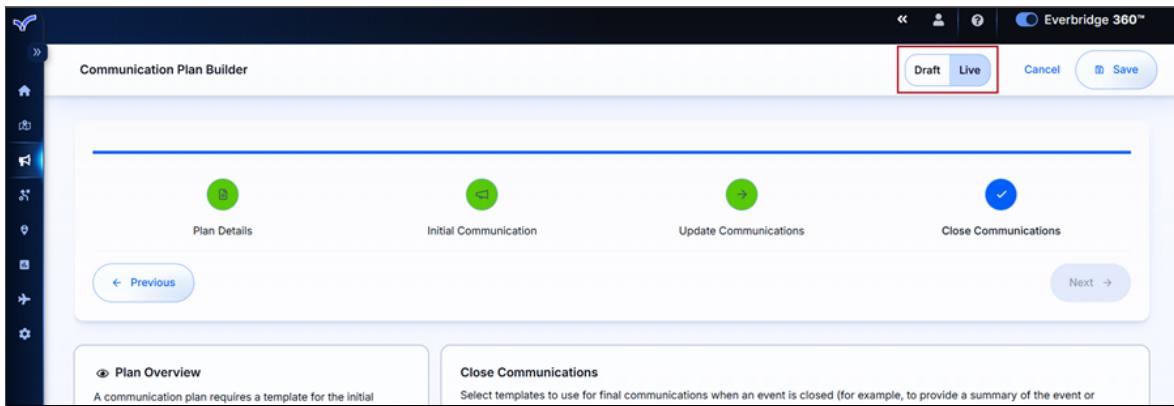
7. Click **Save**. A success message will appear at the bottom of the page indicating that the Communication Plan was saved.

8. The new Communication Plan will now appear in the Library. Click the total number of templates to review the **Template Breakdown** count for each

phase.
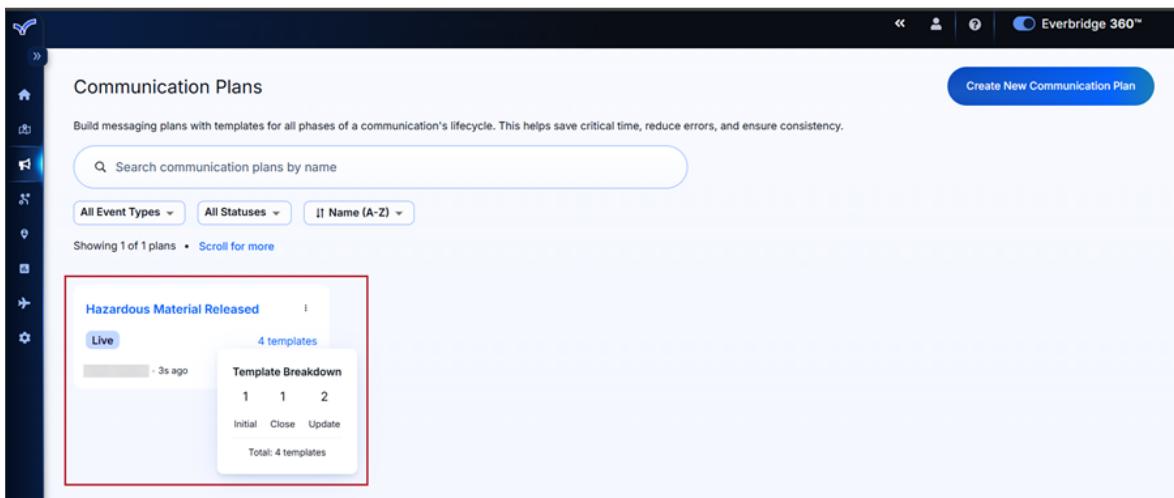
Saving a Communication Plan Draft

When creating or editing a Communication Plan, users can leave the page and return later by enabling the **Draft** toggle at the top of the page and clicking **Save**. Note that changes are not saved automatically and that leaving the page without saving will discard all unsaved changes.
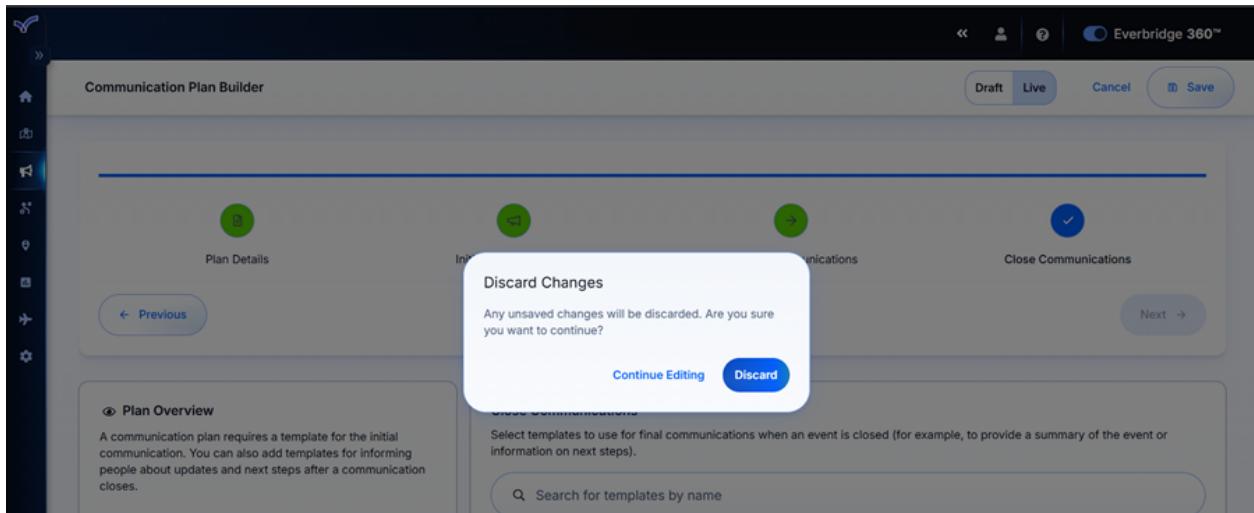
Launching a Communication Plan

Communication Plans can be launched in one of two ways:

- From the **Communication Plans Library**
- From the **Launch Communication** flow

> **NOTE:** Communication Plans in a Draft state can't be launched.

Launching a Communication Plan from the Plans Library

Live Communication Plans can be launched from the **Action** menu in the **Communication Plans Library**. To do this:

1. Navigate to **Communications** > **Everbridge 360** > **Communication Plans.**
2. Click the kebab **Action** menu for the desired Communication Plan and select **Launch.**
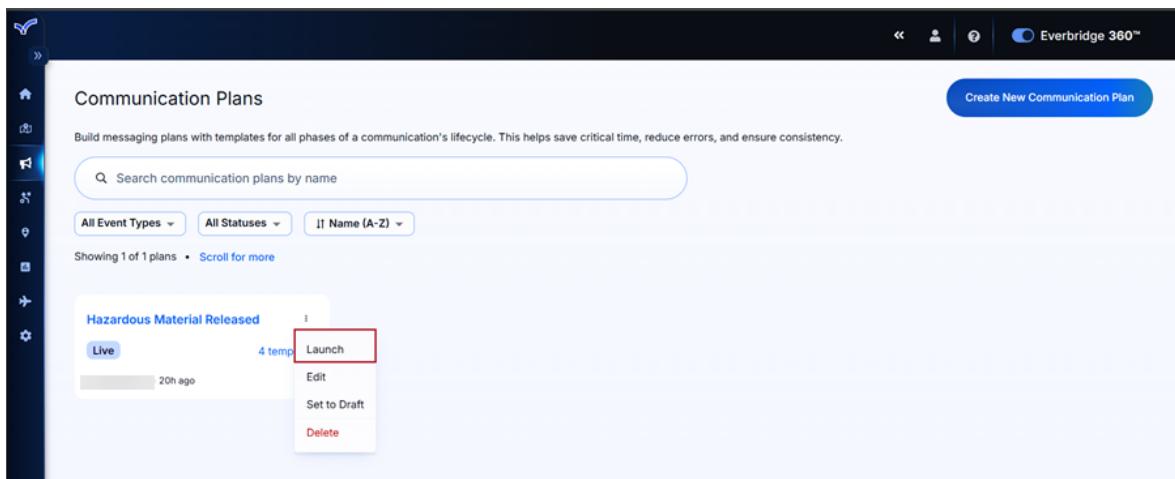
3. The **Launch Communication** form will open with the plan's configured Initial Phase template prepopulated.

4. Continue filling out the Communication form as needed, then click **Launch Communication**.
5. Once the Communication has been launched and it's time to send an update, from the **Activity** panel on the **Communication Details** page, click the **Send Update** button.

6. The **Select Recipients** modal will open. Choose between sending an update to **Existing Recipients** (All or Not Confirmed), or **New Recipients**.
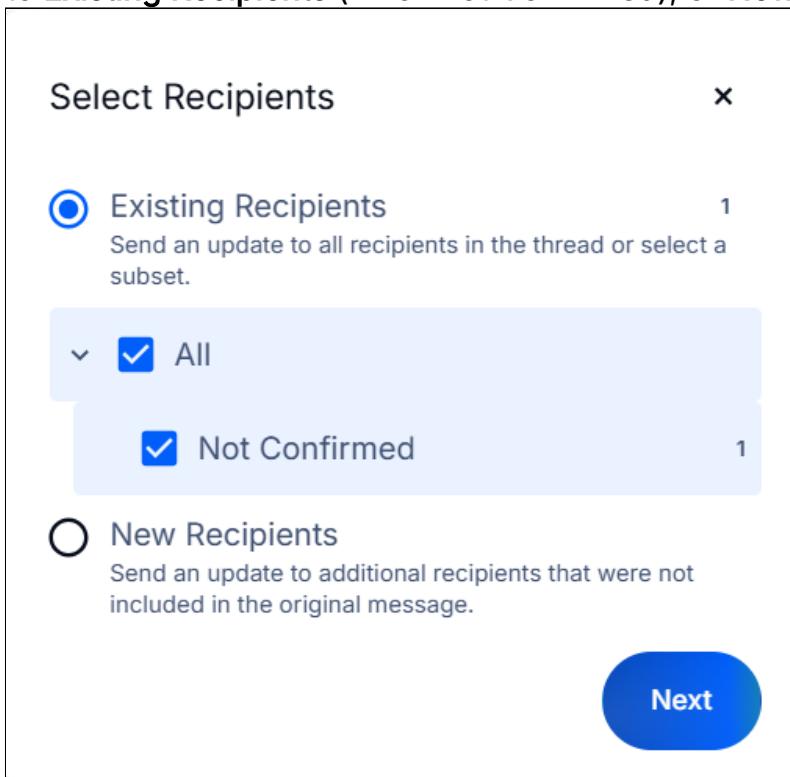
7. The **Send Update to Message** panel will open to the right, where the user can select a Communication Template. By default, any Communication Templates assigned the **Update Phase** and included in the current Communication Plan will be suggested for selection. Note that if a template is included in a Communication Plan, an icon will appear in the corner indicating how many plans it belongs to.
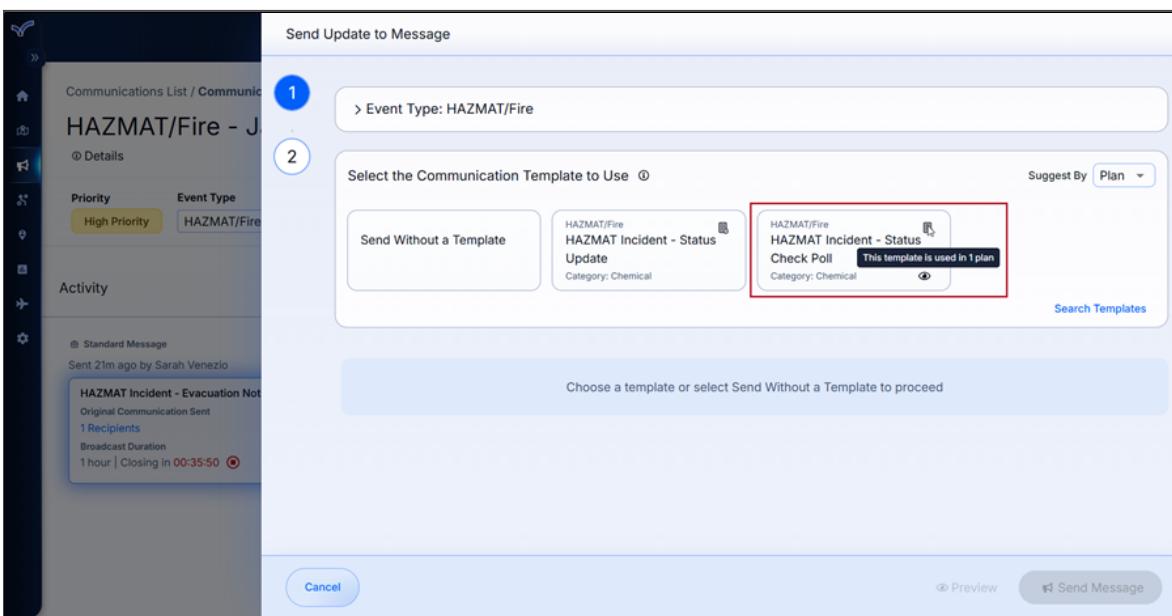
- Other Communication Templates can also be used by searching or changing the **Suggested By** data point. By default, it's set to **Plan** when handling Communication Plans.
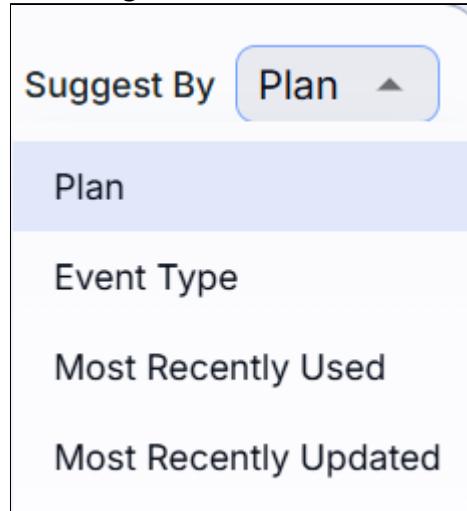

8. Fill in the **Update** message as needed and click **Send Message**. The Update message will populate in the **Activity** panel of the **Communication Details** page.

9. Once the situation has been resolved, click **Close Communication** at the top of the **Communication Details** page, then select **Close with Message**.
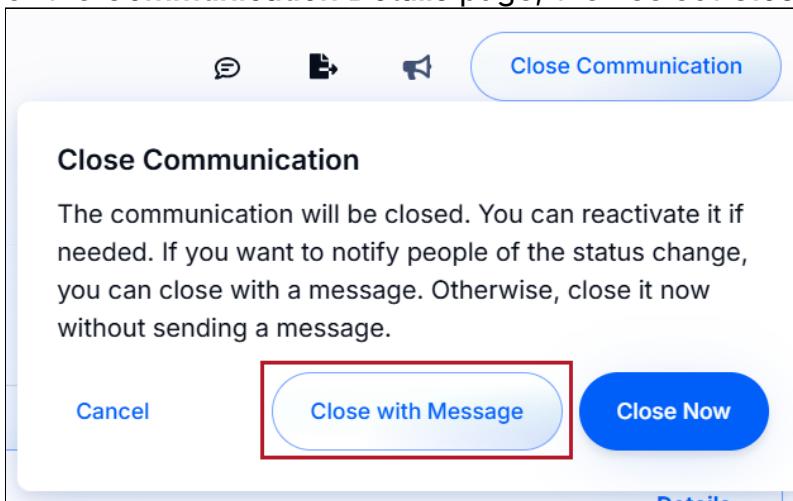
10. The **Send Update to Message** panel will open to the right. Select an appropriate template that has the **Close Phase** designation. Like the previous selections, any applicable Close Phase templates included in the chosen Communication Plan will be suggested by default.
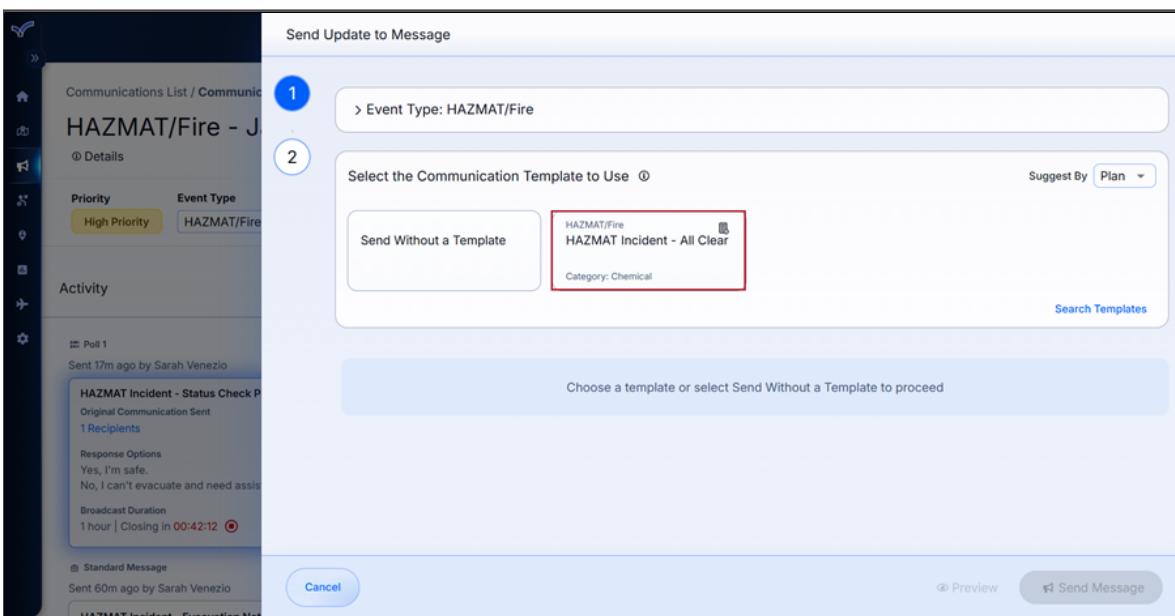
11. Fill in the rest of the Close Phase Communication and click **Send Message**.
12. The Communication will close, and the Close Phase message can be seen in the **Activity** panel with the rest of the related messages.

Launching a Plan from the Launch Communication Flow

Communication Plans can be launched during the regular Launch Communication flow. To do this:

1. Click **Launch Communication** from the sidebar menu (**Communications > Everbridge 360 > Launch Communication**).
2. The **Launch Communication** form will open. Select the desired **Event Type** to populate the suggested Communication Templates, which can also be further filtered by **Most Recently Used** and **Most Recently Updated.**
3. Select a Communication Template. Hovering the cursor over the **Plan** icon will reveal how many Communication Plans it's currently included in.
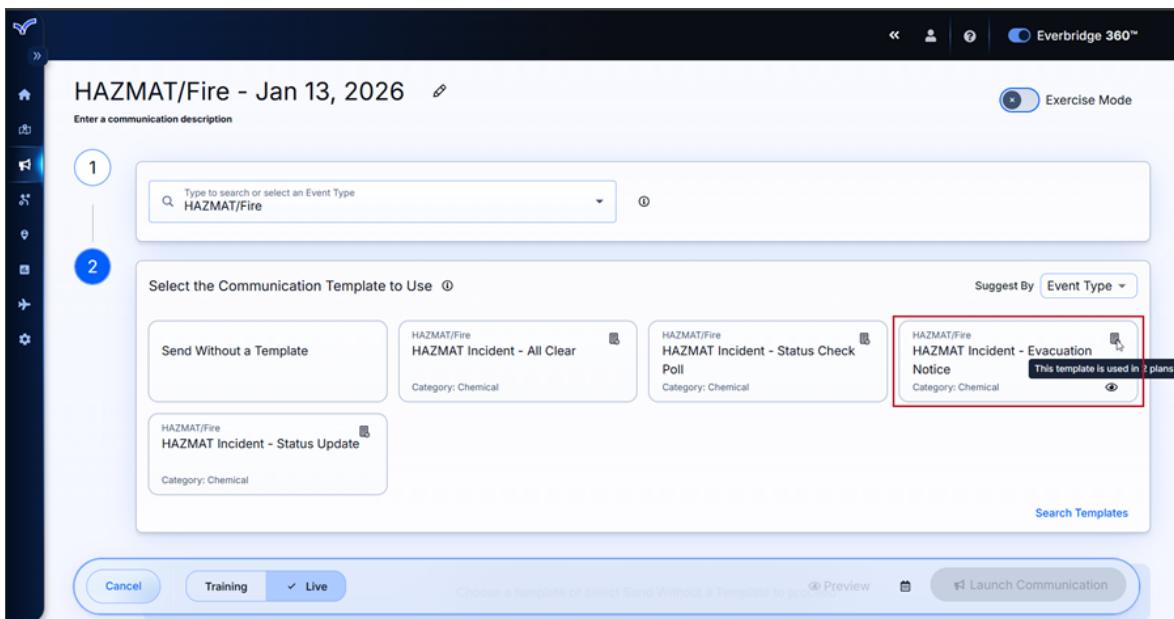
4. If the selected Communication Template is used in more than one Communication Plan, the **Select Communication Plan** modal opens. Choose which plan to use, or select the option to send the Communication without a plan. Click **Select** to proceed.
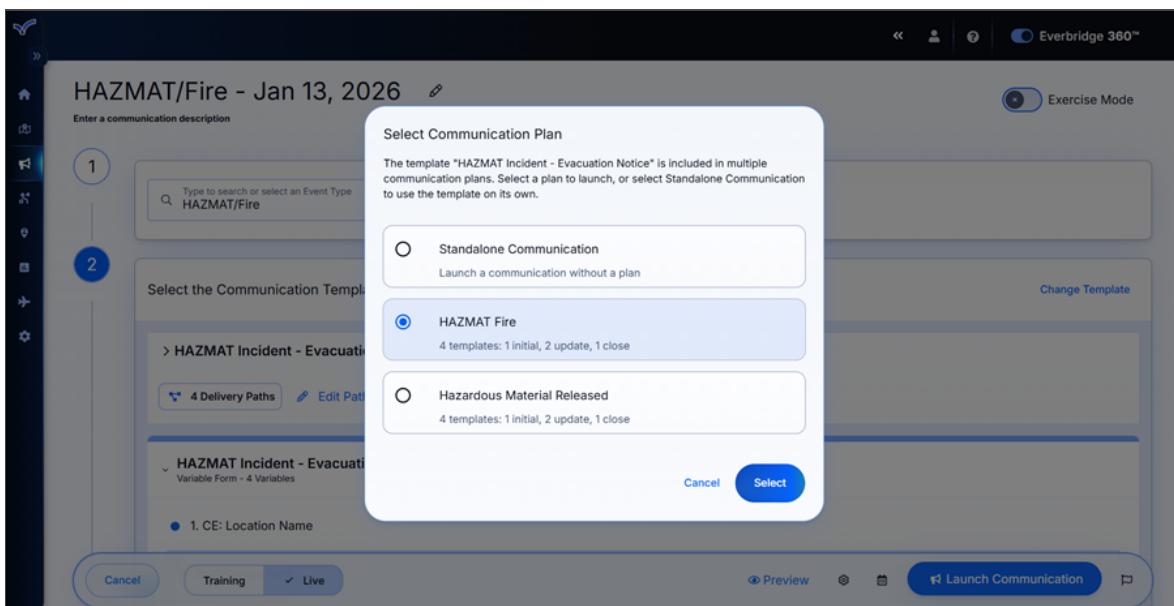
5. The **Launch Communication** form will open with the selected Communication Plan details prefilled. Continue configuring the Communication as needed, then click **Launch Communication.**

Managing Communication Plans

Communication Plans can be launched, edited, deleted, and set to Live/Draft from the **Communication Plans Library** by using the **Action** menu.
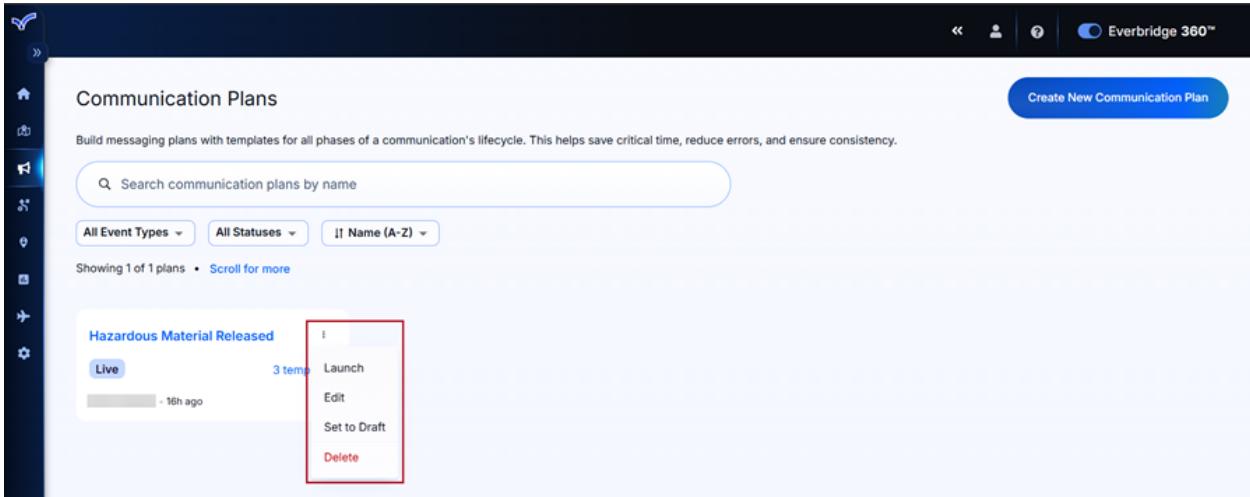
> **NOTE:** See Launching a Communication Plan for more details on sending a Communication Plan.

## Editing a Communication Plan

To edit a Communication Plan:

1. Click the kebab **Action** menu for the desired Communication Plan and select **Edit**.
2. The **Edit Communication Plan** flow will open. Make any needed changes to the selected plan.
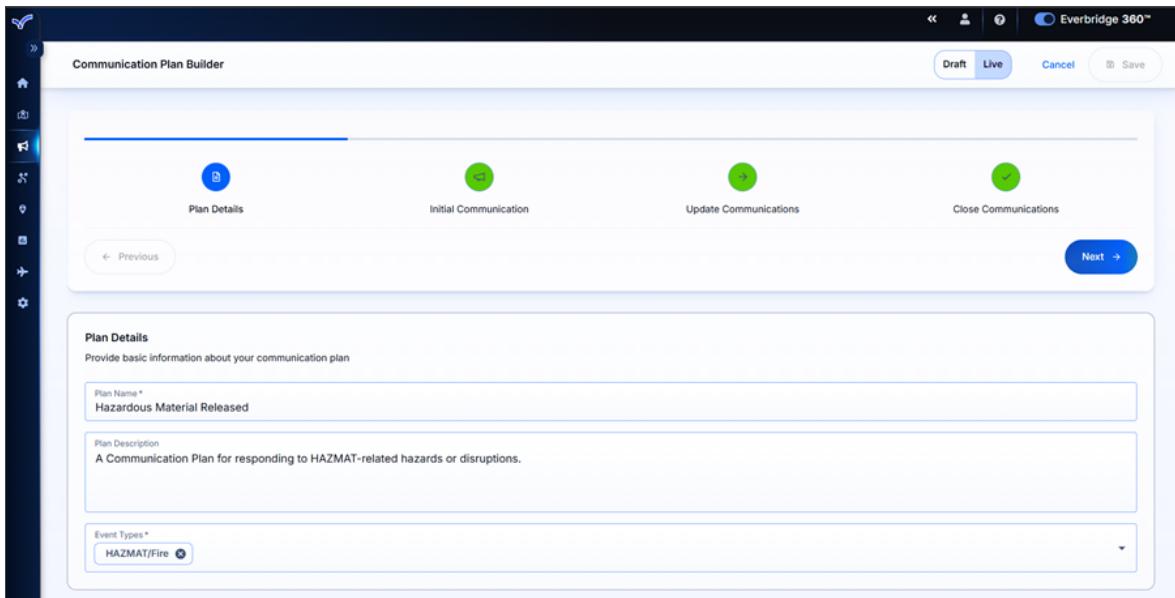
3. Click **Save**.

Changing Plan Status

The status of a Communication Plan is indicated by the blue **Live** or white **Draft** chips. The status can be updated by clicking the **Actions** menu and selecting either:

- **Set to Draft** (if the Communication Plan is currently Live)

- **Set to Live** (if the Communication Plan is currently a Draft)
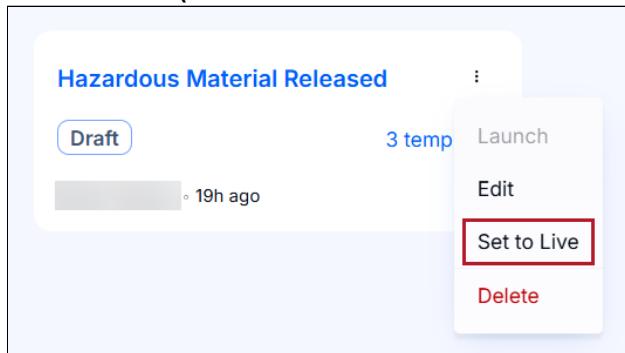
Deleting a Communication Plan

Communication Plans can be deleted by clicking the **Action** menu and selecting **Delete**.