

How to set up a reporting line

Use technology and tools to set up a digital network for news and updates

Overview

This guide will show you how to set up a local number that your community networks can use to share information with you. The great thing about phone calls and text messages is that they are available to all mobile users, smartphone and offline, and so we call them 'common denominator' tools.

By setting up a simple route for people in communities to share their experiences, insight and concerns, in real-time, in their own words, everyone benefits – from being heard, from capturing critical conversations, and from strengthening the ties between us.

There are two options for this – the fastest way is to set up a simple SMS handset or smartphone with a number that you then share with your community. You can easily find affordable handsets online or in shops and get started immediately.

You can also use a virtual phone number. A virtual phone number is a standard telephone number that is not locked down to a specific phone. A virtual number can route a voice call or text message to another phone or an online platform.

You can share this number publicly, within a service, or via a members mailing list so that community members can report their news and concerns; or share it as part of a research or reporting project, so reporters are using it to respond to questions and assignments that you set.

This guide will give instructions on how to:

- Buy a virtual number (£2.00 pcm line rental + usage fees)
- Manage your calls and text messages via an online platform (\$30 monthly fee)
- Add to your smartphone or set up a simple handset
- Best practices on how to manage and maintain the line for your community.

Regardless of which route you choose, you can find instructions on how to successfully manage a reporting line, keeping up engagement, and good reporting standards for your community.

Option 1 – Simple handset

Tools you will need:

- A website, blog, or mailing list to share the number on.

The fastest way to start is by setting up an affordable handset and sharing the number with your community. This is a fast and simple approach that you can get started on straight away. However, there are some considerations before you start:

- You will have to manually record and respond to messages
- The data will not be accessible digitally
- There is no automation for batch messaging
- You have no back-ups

If you use the simple set-up option, you can always port your number onto a digital platform in the future.

Option 2 – A fully digitally managed reporting line

A digitally managed reporting line is a more sustainable and scalable option for a long-term reporting line with high usage. Using an online web app, you can fully manage all your calls, texts, and voicemails. You can also add automation, with a virtual receptionist and bulk messaging to contacts. However, with these benefits, there is a more complex set-up process and costs involved for maintenance.

This guide will talk you through setting up an online platform using Telerivet with a virtual number from Twilio. Let's get started.

Tools you will need:

- A computer
- A smartphone
- A website, blog, or mailing list to share the number on
- A Credit or Debit payment card

Step-by-step - How to set-up a fully digitally managed reporting line

Step 1 – Setting Up Telerivet with a virtual number

Register at <https://telerivet.com/> for the Starter subscription at \$30 per month. With your account verified and activated you can access your dashboard.

In order to communicate with contacts on mobile phones or landlines, your Telerivet project needs a route between the Telerivet servers and the telecom operators.

To start the process, navigate to Route on the dashboard, select your country and tick SMS and Voice. select Twilio virtual number. Follow the instructions from telerivet on how to set up a twilio account. You can then connect your Twilio account to the telerivet system.

With the accounts connected, you can start to manage your phone line in more detail.

Step 2 – Managing Contacts

Telerivet's Contacts page makes it easy to view and edit your contact information, organise your contacts into groups, and easily filter and search your contacts.

You can add individual contacts one-by-one or import spreadsheets of contacts.

As new contacts message in, they will be added automatically and you can edit them to add more detail.

Step 3 – Managing SMS and Voice messages

Telerivet's Messages page is where you can view, organise, and search all your SMS messages and voice calls, and where you can send or schedule messages and calls to individual contacts or groups of contacts.

There are more advanced features to explore. The full guide to using all the features can be found here:

<https://guide.telerivet.com/hc/en-us>

Also, check out this case study on Farm Radio International, an international NGO fighting food insecurity in Africa.

https://telerivet.com/solutions/research/farm_radio

Step 4 – Messaging and calling

You can use the platform to make calls, send personalised SMS messages, emails, as well as pre-recorded voice-messages. Other features include sending surveys and polls via SMS messages.

Having a central hub for all your out-going messages means you can send updates or calls to action to entire communities really easily.

For example, you could send your network a voice recording giving them a detailed update on an on-going issue, or you could send an SMS message to everyone in your network promo.

These features can be managed through Campaigns – this feature walks you through adding new contacts, creating a new group, and scheduling a message to send to them. You can find full details in Telerivet’s guide below:

<https://guide.telerivet.com/hc/en-us/articles/360038959431-Creating-Messaging-Campaigns>

Step 5 – Managing a successful reporting line

Sharing with your community – with your line set-up, you can share the channel with your community. This can be done through advertising it on your blog or website, emailing a group with the number, setting up a survey to share the number with people once you have collected their data, it can also be shared by word of mouth peer-2-peer.

Responding and Replies – for every reply that comes in, you should respond and reply to acknowledge that it’s been received. You can set up a standard response within telerivet.

Storing and recording data – with reports coming in, you should be saving them in a way that’s organised, accessible, and secure. With a digital line, they will all be stored on your platform. For a simple handset, you should copy messages over to a spreadsheet or word doc where you can easily store and review the messages with additional information on time and date.

Further tips for reporting

Live calls – One key use of the channel is for live one-to-one calls. You can speak directly with community members and take notes or even record the call for transcription later.

Voice Messages – As you cannot always be online, you can create a voice message to leave reports via voicemail. Make sure to have a clear set of instructions on what information you need and how they should record their message.

Recordings and transcripts – using transcribing software, you can create documents and quotes from the calls for safekeeping or use in your content.

SMS Messages – short SMS reports can tell you headline news from communities, share short quotes from community conversations, or you can use them to poll or survey community members on key topics, sparking a dialogue or question and answer series.