



modern[®] campus

Engaging Modern Learners
For Life

User Management + Settings

Explore the options to personalize your experience using Message and manage users in your program.

Agenda

1. Settings Intro
2. Personal Settings
3. Invite + Delete Users
4. Program + Counselor Settings
5. Q&A

Introduce yourself in the chat! Which institution are you here with?

User Management + Settings

Explore the options to personalize your experience using Message and manage users in your program.

1. Settings Intro
2. Personal Settings
3. Invite + Delete Users
4. Program + Counselor Settings
5. Q&A

Agenda

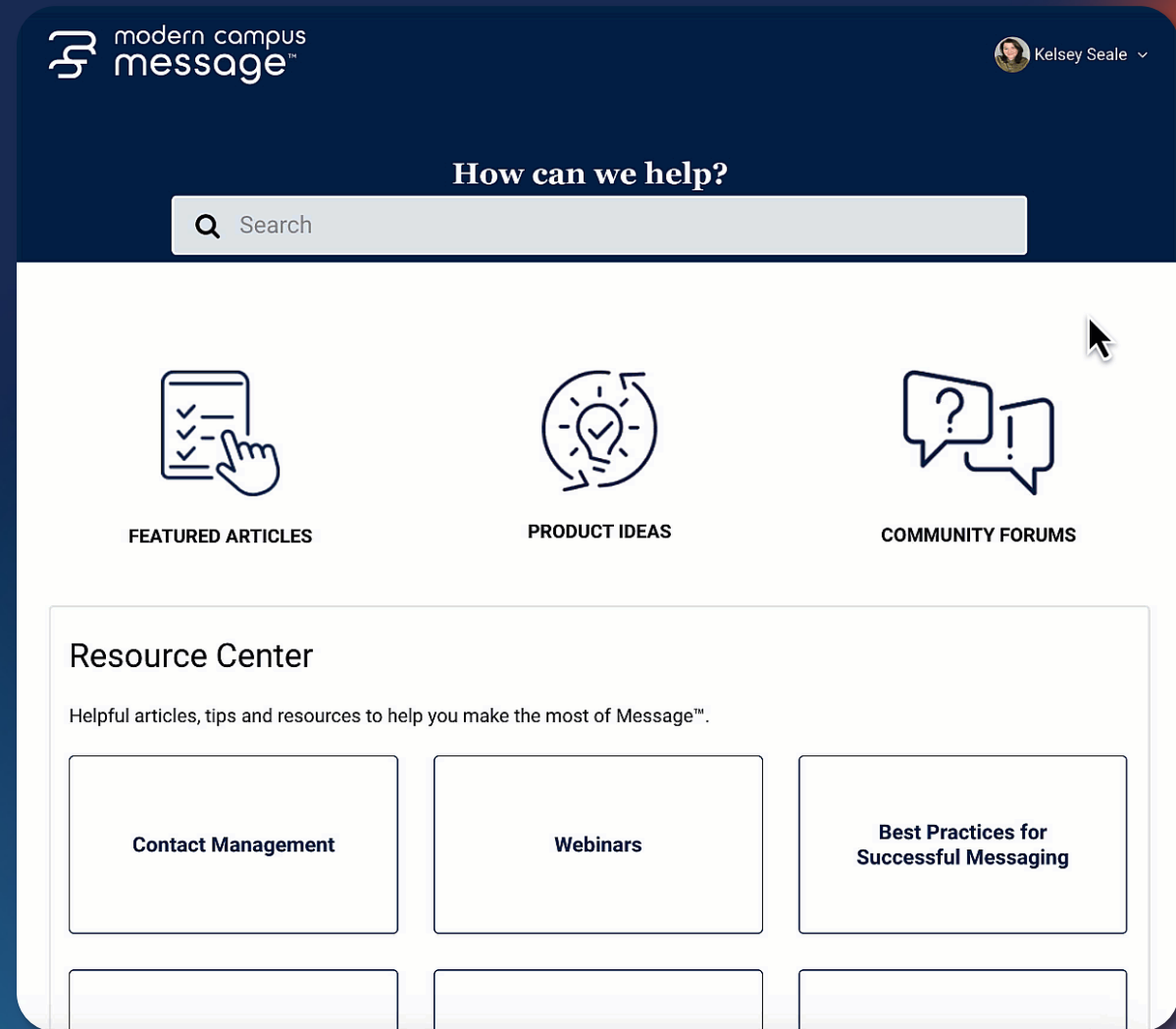
1. Settings Intro
2. Personal Settings
3. Invite + Delete Users
4. Program + Counselor Settings
5. Q&A
6. Close



“Is this being
recorded??”

“Is this being
recorded??”

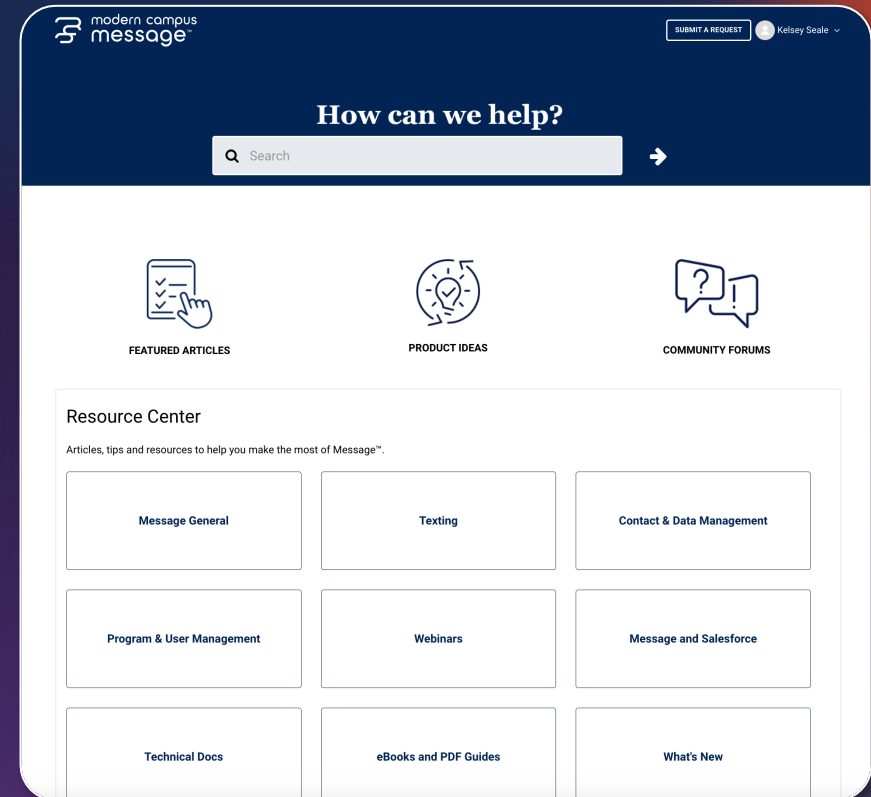
YES!



Who is suited
to this webinar?

Who is suited to this webinar?

*Everyone (at the start!) then
program and account admin.*



Personal Settings

Locate Your Personal Settings

The screenshot shows the Modern Campus Message interface. The top navigation bar includes 'Messages', 'Contacts', 'Programs', 'Analytics', and 'Implementation HE'. A user profile dropdown menu is open, showing the user's name 'Kelsey Seale' and email 'kseale+1@moderncampus.com'. Below this, there is a section for 'ACCOUNTS' with 'Implementation HE' selected. The 'Settings' option is highlighted with a red mouse cursor. Other options in the dropdown include 'Terms of Service', 'Privacy Policy', and 'Logout'. The background shows an email inbox with messages from Glenn Stephens and Rudy Bishop.

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Personal Settings

1. Name
2. Phone Number
3. Automatically mark messages as read
4. Notifications

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The screenshot shows the 'Personal Settings' page in the Modern Campus Message interface. The page has a purple header with the 'modern campus message' logo and navigation links for Messages, Contacts, Programs, Analytics, Implementation HE, and a settings icon. Below the header, there are tabs for 'My Preferences', 'User Management', 'Virtual Advisors', and 'API'. The main content area is divided into three sections: 'Status', 'Settings', and 'Notifications'. The 'Status' section includes fields for Email (kseale+1@moderncampus.com), First Name (Kelsey), Last Name (Seale), and Mobile Phone (+1(555) 555-5555). The 'Settings' section has a checkbox for 'Automatically mark conversations as No Action Needed when I respond' with a sub-note. The 'Notifications' section has three checkboxes: 'Receive desktop notifications' (checked), 'Receive daily notifications via email', and 'Receive daily notifications via SMS', each with a sub-note.

modern campus message Messages Contacts Programs Analytics Implementation HE

My Preferences User Management Virtual Advisors API

Status

Email
kseale+1@moderncampus.com

First Name Last Name
Kelsey Seale

Mobile Phone
+1(555) 555-5555

Settings

Automatically mark conversations as No Action Needed when I respond
Conversations will move to No Action Needed any time you respond to the conversation

Notifications

Receive desktop notifications
Desktop notifications are sent when you have received messages. In order to change these settings, please review this [help](#) document.

Receive daily notifications via email
Emails are only sent when you have received messages.

Receive daily notifications via SMS
SMSs will be sent from 323-SGL-VINE (323-745-8463) when you have received messages.

Status

Edit your name
anytime.

Mobile Phone =
OPTIONAL!

Contacts will NOT know
or receive texts from your
personal number.

Status

Email

kseale+1@moderncampus.com

First Name

Kelsey

Last Name

Seale

Mobile Phone

+1(555) 555-5555

Settings

- Automatically mark conversations as No Action Needed when I respond
Conversations will move to No Action Needed any time you respond to the conversation

Settings

Automatically mark conversations as **No Action Needed** when I respond

Conversations will move to **No Action Needed** any time you respond to the conversation

Kelsey

Seale

Mobile Phone

+1(555) 555-5555

Settings

- Automatically mark conversations as No Action Needed when I respond
Conversations will move to No Action Needed any time you respond to the conversation

Notifications





- Receive desktop notifications
Desktop notifications are sent when you have received messages. In order to change these settings...
- Receive daily notifications via email
Emails are only sent when you have received messages.
- Receive daily notifications via SMS
SMSs will be sent from 323-SGL-VINE (323-745-8463) when you have received messages.

Message lands in
your action
needed folder

You respond...

[advanced search](#)

FOLDERS

-  All (111)
-  **Action Needed (10)**
-  No Action Needed (101)
-  Sent

FLAG TYPE

- All
- Flagged Only

Sort

nope



ertson

(Y)

Reid Hubbard



ADVISING (ANDY)





NOO!

- ✓ Saves time
- ✓ Stay organized
- ✓ Inbox Zero!

Search messages  


[advanced search](#)

FOLDERS

-  All (111)
-  **Action Needed** (10)
-  No Action Needed (101)
-  Sent

FLAG TYPE

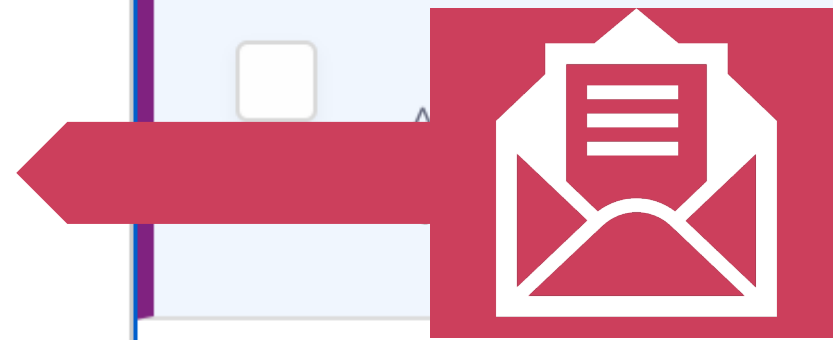
- All

 Sort

nope

Calvin Robertson

Reid Hubbard
ADVISING (ANDY)
NOO!



Settings

Automatically mark conversations as **No Action Needed** when I respond

Conversations will move to **No Action Needed** any time you respond to the conversation

Kelsey

Seale

Mobile Phone

+1(555) 555-5555

Settings

- Automatically mark conversations as No Action Needed when I respond
Conversations will move to No Action Needed any time you respond to the conversation

Notifications

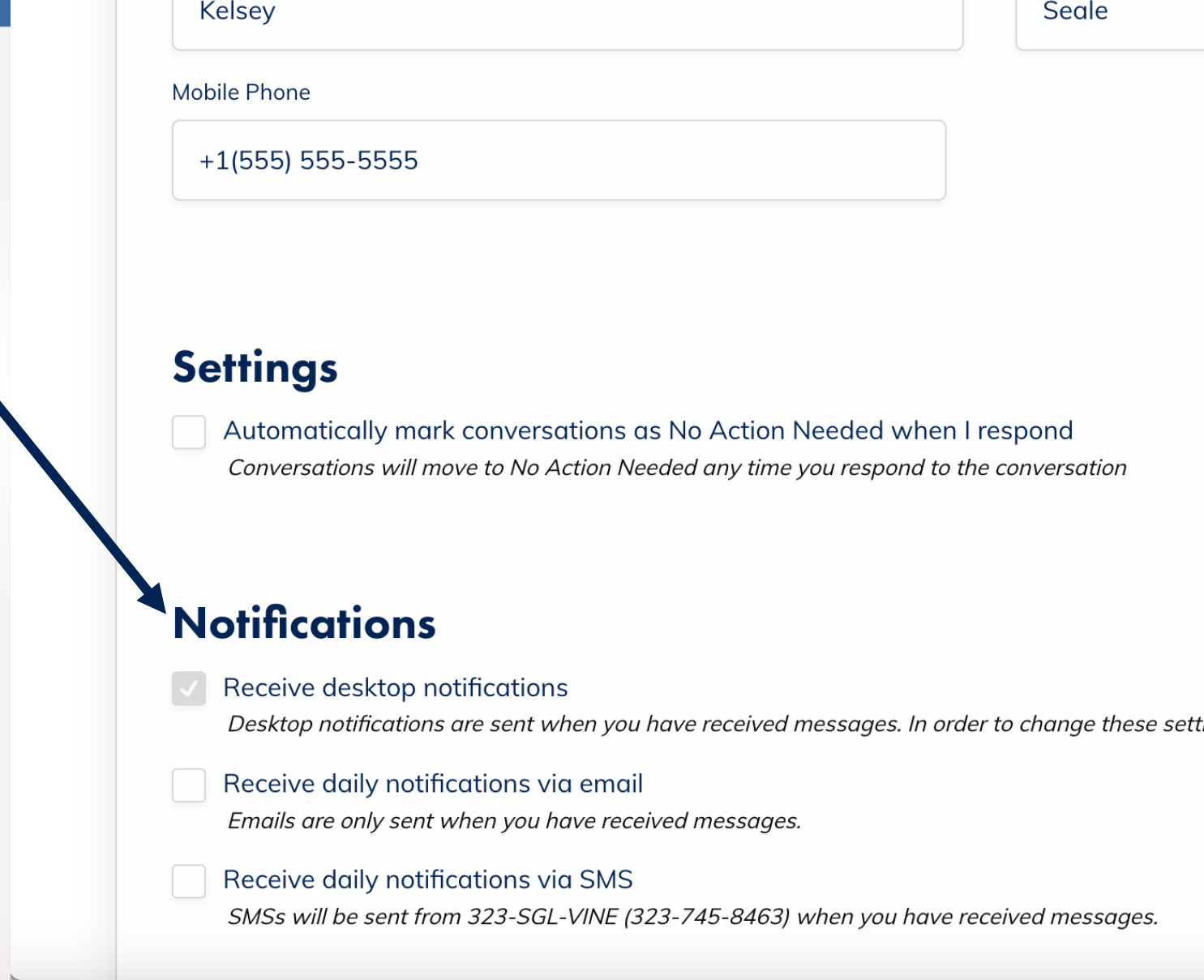
- Receive desktop notifications
Desktop notifications are sent when you have received messages. In order to change these settings...
- Receive daily notifications via email
Emails are only sent when you have received messages.
- Receive daily notifications via SMS
SMSs will be sent from 323-SGL-VINE (323-745-8463) when you have received messages.

Demo how to find and update your settings

Notifications

1. Desktop
2. Daily Email
3. Daily SMS

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Kelsey

Seale

Mobile Phone

+1(555) 555-5555

Settings

- Automatically mark conversations as No Action Needed when I respond
Conversations will move to No Action Needed any time you respond to the conversation

Notifications

- Receive desktop notifications
Desktop notifications are sent when you have received messages. In order to change these sett.
- Receive daily notifications via email
Emails are only sent when you have received messages.
- Receive daily notifications via SMS
SMSs will be sent from 323-SGL-VINE (323-745-8463) when you have received messages.

Notifications

1. Desktop

2. Daily Email

19 3. Daily SMS

✓ Real Time

✓ Individual

✓ Browser Pop-Up

Kelsey

Seale

Mobile Phone

+1(555) 555-5555

Settings

- Automatically mark conversations as No Action Needed when I respond
Conversations will move to No Action Needed any time you respond to the conversation

Notifications

- Receive desktop notifications
Desktop notifications are sent when you have received messages. In order to change these settings...
- Receive daily notifications via email
Emails are only sent when you have received messages.
- Receive daily notifications via SMS
SMSs will be sent from 323-SGL-VINE (323-745-8463) when you have received messages.

Notifications

1. Desktop

2. Daily Email

3. Daily SMS

✓ Once a day

✓ Cumulative

Kelsey

Seale

Mobile Phone

+1(555) 555-5555

Settings

- Automatically mark conversations as No Action Needed when I respond
Conversations will move to No Action Needed any time you respond to the conversation

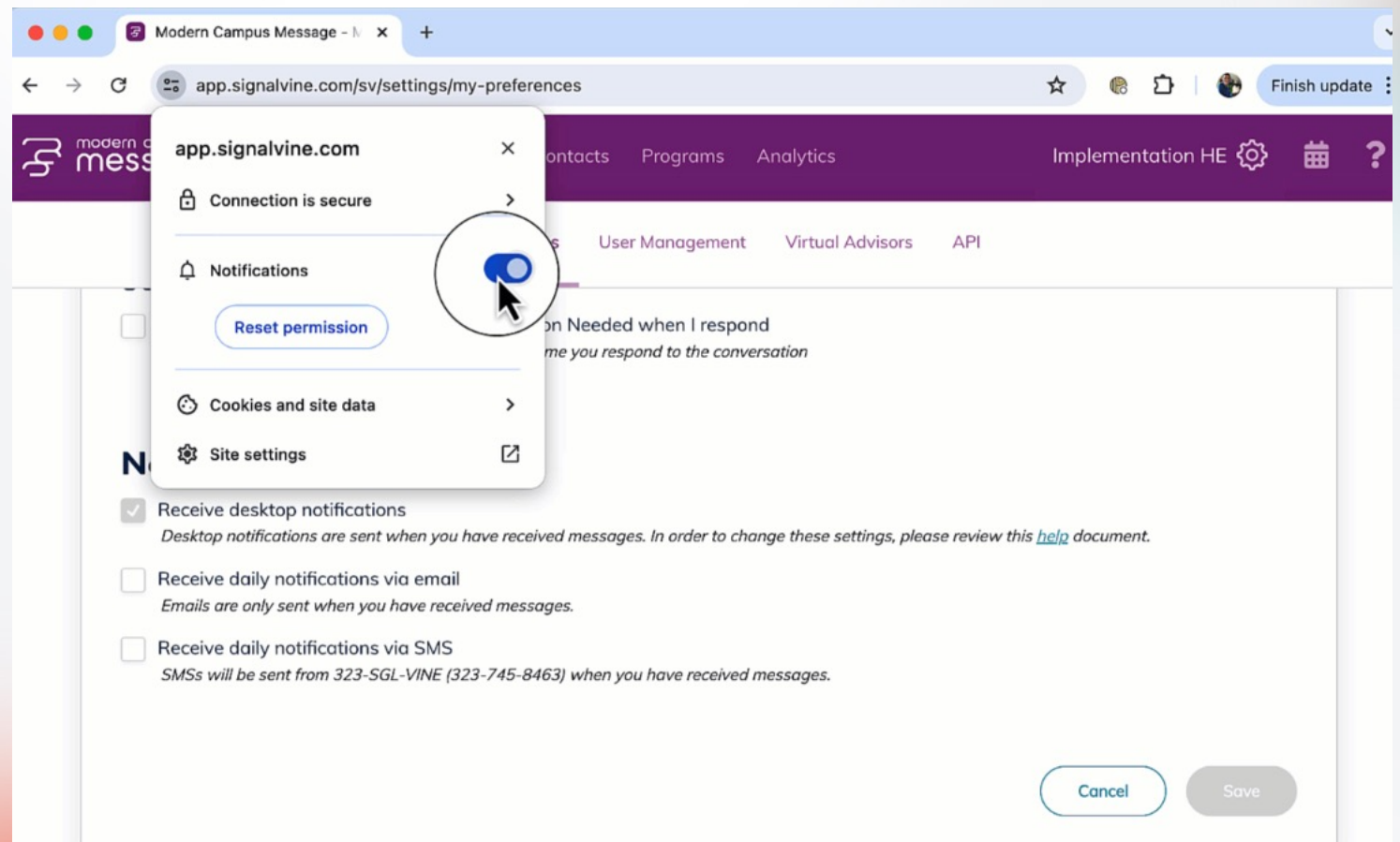
Notifications

- Receive desktop notifications
Desktop notifications are sent when you have received messages. In order to change these settings, click on the gear icon in the top right corner of the conversation.
- Receive daily notifications via email
Emails are only sent when you have received messages.
- Receive daily notifications via SMS
SMSs will be sent from 323-SGL-VINE (323-745-8463) when you have received messages.

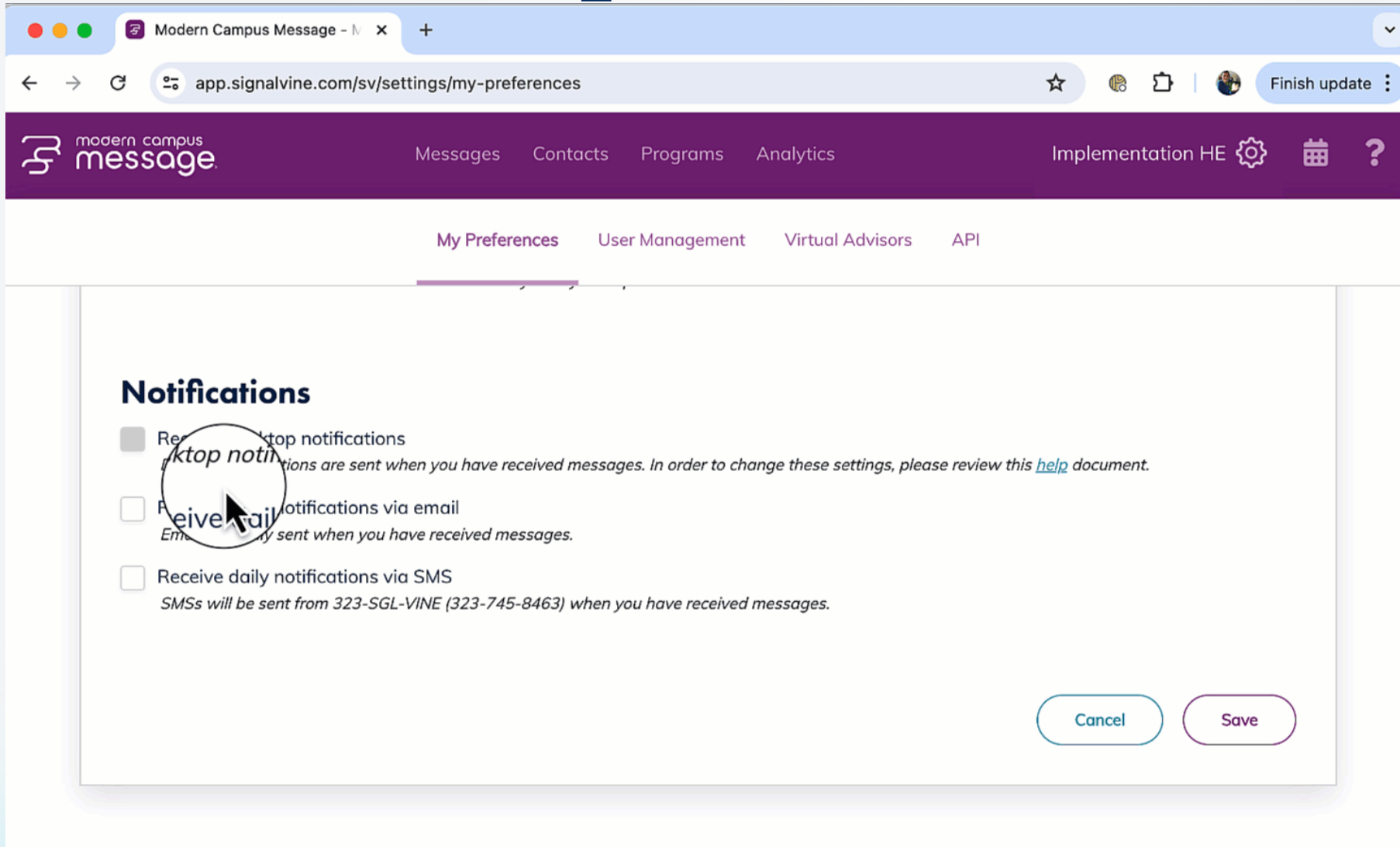
Enable Desktop Notifications

Can't click the check box? NO PROBLEM!

1. Select the settings gears in the URL bar
2. Toggle on “Notifications”



Enable Desktop Notifications



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Disable Desktop Notifications

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The screenshot shows a web browser window with the address bar displaying 'app.signalvine.com/sv/settings/my-preferences'. The page header includes the 'modern campus message' logo and navigation links for 'Messages', 'Contacts', 'Programs', 'Analytics', 'Implementation HE', and a help icon. The main content area is titled 'My Preferences' and contains several settings. The 'Notifications' section is highlighted, showing three options: 'Receive desktop notifications' (checked), 'Receive daily notifications via email' (unchecked), and 'Receive daily notifications via SMS' (unchecked). A mouse cursor is pointing at the 'Receive desktop notifications' checkbox. At the bottom right, there are 'Cancel' and 'Save' buttons.

Modern Campus Message - M x +

app.signalvine.com/sv/settings/my-preferences

modern campus message

Messages Contacts Programs Analytics Implementation HE ?

My Preferences User Management Virtual Advisors API

Automatically mark conversations as No Action Needed when I respond
Conversations will move to No Action Needed any time you respond to the conversation

Notifications

Receive desktop notifications
Desktop notifications are sent when you have received messages. In order to change these settings, please review this [help](#) document.

Receive daily notifications via email
Emails are only sent when you have received messages.

Receive daily notifications via SMS
SMSs will be sent from 323-SGL-VINE (323-745-8463) when you have received messages.

Cancel Save

Demo how to update your desktop notifications

Manage Users

Invite, delete, and update counselors,
program admin, and account admin

3 Roles in Message

Account Admin

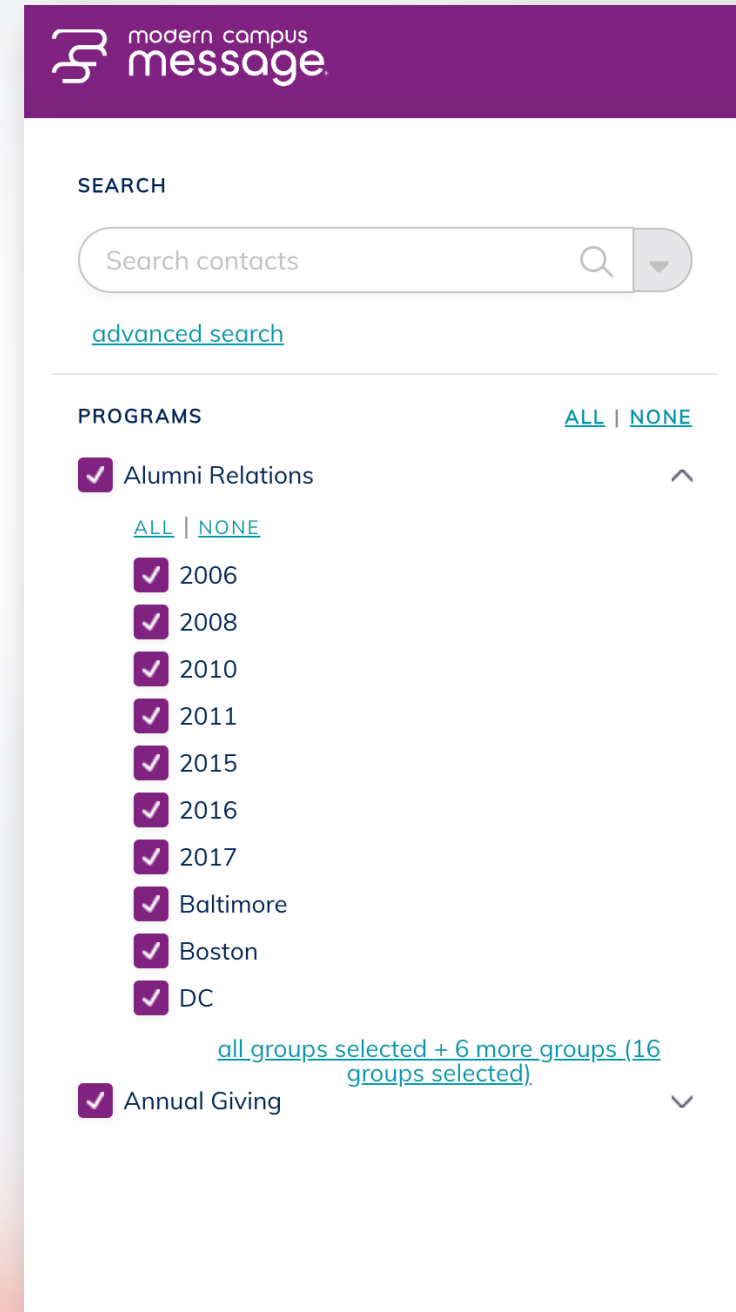
- All student access
- Invite users
- Update settings
- Import data

Program Admin

- All assigned program access
- Invite users to their program
- Update settings of their program
- Import data to their program

Counselor

- Access to the students on their caseload



Locate User Management

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The screenshot displays the Modern Campus Message web application interface. At the top, a purple navigation bar contains the logo and menu items: Messages, Contacts, Programs, Analytics, and Implementation HE. A gear icon (Settings) is highlighted with an orange mouse cursor. Below the navigation bar, the main content area is divided into three sections: a left sidebar, a central message list, and a right-hand user profile dropdown menu.

SEARCH

Search mes

[advanced search](#)

FOLDERS

- All (111)
- Action Needed (10)
- No Action Needed (101)
- Sent

FLAG TYPE

Message List:

<input type="checkbox"/>	Sort by Newest
<input type="checkbox"/>	Glenn Stephens 10/15/21 REGISTRAR blah blah
<input type="checkbox"/>	Rudy Bishop 2/10/21 REGISTRAR I'm at work right now.
<input type="checkbox"/>	Kelly Hopkins • 2/10/21

User Profile Dropdown (Kelsey Seale):

- kseale+1@moderncampus.com [View Message](#)
- ACCOUNTS**
- Implementation HE
- Settings**
- Terms of Service
- Privacy Policy
- Logout

Invite a new user

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modern campus message

Messages Contacts Programs Analytics Implementation HE

My Preferences **User Management** Virtual Advisors API

Manage Users

Invite New User

Active Users (10) Pending Invitations (1)

Search: Filter by first name, last name or email

FIRST NAME	LAST NAME	EMAIL	ROLES	ACTIONS
Isa	Counselor	ilovain+counselor@moderncamp...	Counselor: 2022 (Financial Aid) Counselor: 2021 (Financial Aid) Counselor: 2023 (Financial Aid) Counselor: Michael (Advising)	
Kelsey	Counselor	kseale+4@moderncampus.com	Counselor: 2006 (Admissions)	
Marcie	Huff	marciers@gmail.com	AccountAdmin	







Manage Users

Invite New User

- Account Admin
- Program Admin
- Counselors

Active Users (10) Pending Invitations (1)

Search:

FIRST NAME	LAST NAME	EMAIL	ROLES	ACTIONS
Isa	Counselor	ilovain+counselor@moderncamp...	Counselor: 2022 (Financial Aid) Counselor: 2021 (Financial Aid) Counselor: 2023 (Financial Aid) Counselor: Michael (Advising)	 
Kelsey	Counselor	kseale+4@moderncampus.com	Counselor: 2006 (Admissions)	 
Marcie	Huff	marciers@gmail.com	AccountAdmin	 

Single OR Bulk Invitation

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Invite New User - Program Admin ✕

Configure a **Program Admin** role associated with specific program(s).

Invite a single user
 Invite multiple users (bulk)

Email

Select Program(s):

Programs

- Admissions
- Advising**

Discard Cancel Invite

Invite in Bulk

Invite New Users - Program Admin

Use a file to invite multiple Program Admin users to different programs in the account.

Invite a single user
 Invite multiple users (bulk)

Upload a CSV file

The CSV must contain the fields:

- **email** (the user to invite)
- **programid** a semi-colon delimited list of program IDs that the user will administer. ?

Please select a CSV file to import (15MB)

Select File

Cancel Review

	A	B	C
1	programid	emails	group_list
2	b1facb78-1828-468a-a	kseale+20@moderncam	2006
3	b1facb78-1828-468a-a	kseale+20@moderncam	2007
4			
5			

Resend or Revoke an Invitation

Manage Users




Invite New User 

Active Users (10)

Pending Invitations (1)



1 - 25  of 1

EMAIL	INVITATION DATE	ACTIONS
kseale+10@moderncampus.com	9/01/23 12:59 PM	  

Resend Invitation











View Invitation

Delete Invitation

Update a User's Permissions

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Filter by first name, last name or email

FIRST NAME	LAST NAME	EMAIL	ACTIONS
Isa	Counselor	ilovain+counselor@moderncamp...	 
Kelsey	Counselor	kse...	 
Marcie	Huff	ma...	 
Chris Test	Hyman Test	svt...	 
Isa	Lovain	isa+counselor@signalvine.com	 

Update User Permission

Delete User

Demo

1. Go to user management settings
2. Invite a new account admin
3. Invite new counselors in bulk
4. Resend, revoke, and edit a user

Program Setting

Program Settings

➤ Programs Tab

➤ Settings Tab

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The screenshot displays the Modern Campus Message interface. At the top, a purple navigation bar contains the 'modern campus message' logo on the left and navigation links for 'Messages', 'Contacts', 'Programs', and 'Analytics' in the center. On the right side of the navigation bar are icons for 'Implementation HE', a gear (settings), a calendar, and a question mark. Below the navigation bar, the 'Programs' tab is selected, and the 'Settings' sub-tab is highlighted with an orange mouse cursor. The main content area shows a list of program settings: 'Message Calendar', 'Settings', 'Add Single Contact', 'Export Contacts', 'Manage Fields', and 'Import Contacts'. Below this list are 'Autoresponder' and 'Phone Numbers'. On the left side of the interface, there is a sidebar with the heading 'PROGRAMS' and a list of checkboxes: 'Admissions' (checked), 'Advising', 'Financial Aid', and 'Registrar'. Below the settings list, the heading 'Settings for Admissions' is displayed, followed by the text 'Program ID: b1facb78-1828-468a-a556-67c3fac97085'.

The screenshot displays the 'modern campus message' interface. The top navigation bar includes 'Messages', 'Contacts', 'Programs', and 'Analytics'. The 'Programs' tab is active, showing a list of programs on the left: Admissions (checked), Advising, Financial Aid, and Registrar. The main content area is titled 'Settings for Admissions' and contains the following information:

- Message Calendar** | **Settings** | Add Single Contact | Export Contacts
- Manage Fields | Import Contacts | Autoresponder | Phone Numbers
- Program ID:** b1facb78-1828-468a-a556-67c3fac97085
- Internal name:** Admissions-CS20
- Display name ***: Admissions
- Program settings:**
 - Timezone for program reports: US/Eastern
 - Allow this program to accept MMS messages from contacts
 - Automatically mark conversations read when they are moved to No Action Needed
 - Show first group list entry when viewing conversations
- Counselor settings:**
 - Allow counselors to add a single contact
 - Allow counselors to delete individual program messages for a contact
 - Prevent counselors from viewing personally identifiable information (PII) by hiding the `last_name` and the last four digits of the `phone` field.
 - Prevent counselors from activating contacts
 - Allow counselors to send images

At the bottom right, there are 'Cancel' and 'Save' buttons.

Select the correct program!

PROGRAMS

- Admissions
- Advising
- Financial Aid
- Registrar

modern campus

Programs Analytics

Implementation HE

Settings Add Single Contact Export Contacts

Import Contacts Autoresponder Phone Numbers

Admissions

3fac97085

Program settings

Timezone for program reports US/Eastern

- Allow this program to accept MMS messages from contacts
- Automatically mark conversations read when they are moved to No Action Needed
- Show first group list entry when viewing conversations

Counselor settings

- Allow counselors to add a single contact
- Allow counselors to delete individual program messages for a contact
- Prevent counselors from viewing personally identifiable information (PII) by hiding the last_name and the last four digits of the phone field.
- Prevent counselors from activating contacts
- Allow counselors to send images

Cancel Save

Settings for Admissions

Program ID:

b1facb78-1828-468a-a556-67c3fac97085

Internal name

Admissions-CS20

Display name *

Admissions

PROGRAMS

Admissions

Advising

Financial Aid

Registrar

Program settings

Timezone for program reports

US/Eastern



Allow this program to accept MMS messages from contacts

Automatically mark conversations read when they are moved to No Action Needed

Display Name:
Update How your
program displays on
the portal.

**Accept MMS (pictures)
from contacts.**

**Move read
conversations to No
Action Needed**

**Show Program AND
Group in
conversations**

Admissions

Program settings

Timezone for program reports

US/Eastern



- Allow this program to accept MMS messages from contacts
- Automatically mark conversations read when they are moved to No Action Needed
- Show first group list entry when viewing conversations

Counselor settings

- Allow counselors to add a single contact
- Allow counselors to delete individual program messages for a contact
- Prevent counselors from viewing personally identifiable information (PII) by hiding the `last_name` and the last four digits of the `phone` field.
- Prevent counselors from activating contacts
- Allow counselors to send images



Sort by Newest

JC

[Jennifer Cecere](#)

Admissions

Jennifer Cecere

8/28/20

ADMISSIONS

when is it a due again?

Derek Demsky

8/28/20

ADMISSIONS

just submitted mine!

Ivan Kiepe

8/28/20

ADMISSIONS

Hey Jennifer! We're



CRICKET UNIV
**CHECK
AFTER
PRESENTA**

Jennifer Cecere

Admissions (East)

Hi Jennifer! We have c

There's o

just submitted mine!

Ivan Kiepe

8/28/20

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JC Jennifer Cecere
Admissions

Sort by Newest

Jennifer Cecere
ADMISSIONS
when is it a due again?

JC Jennifer Cecere
Admissions (East)

Sort by Newest

Jennifer Cecere
ADMISSIONS (EAST)
when is it a due again? 8/28/20

Derek Demsky
ADMISSIONS
just submitted mine!

Hi Jennifer! We have c

Ivan Kiepe
ADMISSIONS

Derek Demsky
ADMISSIONS (SOUTH)
just submitted mine! 8/28/20

There's o

Ivan Kiepe 8/28/20

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**Accept MMS (pictures)
from contacts.**

**Move read
conversations to No
Action Needed**

**Show Program AND
Group in
conversations**

Admissions

Program settings

Timezone for program reports

US/Eastern



- Allow this program to accept MMS messages from contacts
- Automatically mark conversations read when they are moved to No Action Needed
- Show first group list entry when viewing conversations

Counselor settings

- Allow counselors to add a single contact
- Allow counselors to delete individual program messages for a contact
- Prevent counselors from viewing personally identifiable information (PII) by hiding the `last_name` and the last four digits of the `phone` field.
- Prevent counselors from activating contacts
- Allow counselors to send images

Counselors can add single contacts.

Counselors can delete program messages for a contact.

Counselors can view PII

- Allow this program to accept MMS messages from contacts
- Automatically mark conversations read when they are moved to No Action Needed
- Show first group list entry when viewing conversations

Counselor settings

- Allow counselors to add a single contact
- Allow counselors to delete individual program messages for a contact
- Prevent counselors from viewing personally identifiable information (PII) by hiding the `last_name` and the last four digits of the `phone` field.
- Prevent counselors from activating contacts
- Allow counselors to send images

Cancel

Save

**Counselors
can/cannot activate
contacts.**

**Counselors
can/cannot send
images (MMS)**

Counselor settings

- Allow counselors to add a single contact
- Allow counselors to delete individual program messages for a contact
- Prevent counselors from viewing personally identifiable information (PII) by hiding the `last_name` and the last four digits of the `phone` field.
- Prevent counselors from activating contacts
- Allow counselors to send images

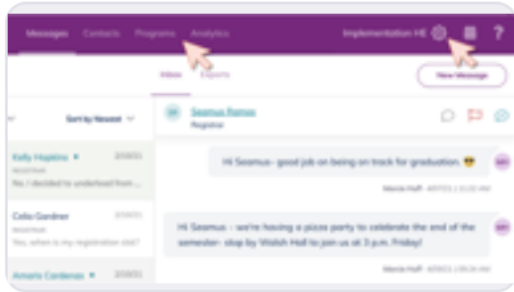
Cancel

Save

Demo Program Settings, Including Group List

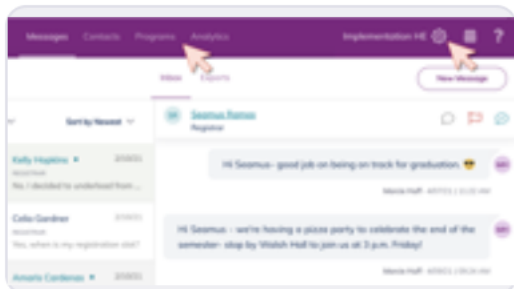
Pop Quiz!

1. Where can you find your **PERSONAL** settings? (Single choice)



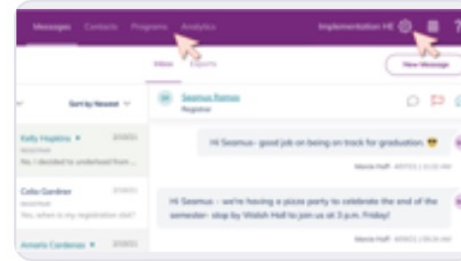
- Programs Tab
- Gear Icon

2. Where can you find your **PROGRAM** settings? (Single choice)



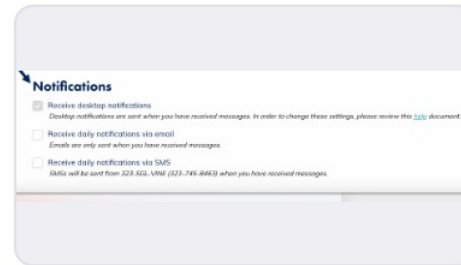
- Programs Tab
- Gear Icon

3. Where can you add and update contacts? (Single choice)



- Programs Tab
- Gear Icon

4. Which notification option allows **REAL TIME** notification of new messages? (Single choice)



- SMS Notifications
- Email Notifications
- Desktop Notifications

What do you feel empowered
to do after this webinar?

Q&A

Please put your questions in the Q&A box.
I'll get to as many as possible and follow up via
email if more research is needed!

Thank You

See you next month!