Introduce yourself in the chat!
What is your institution and where in the world are you?

I'm in Philly, but originally from Birmingham, AL!

Message 101 for Counselors

Learn about the platform and what you can do!

Kelsey Seale

Message 101 for Counselors

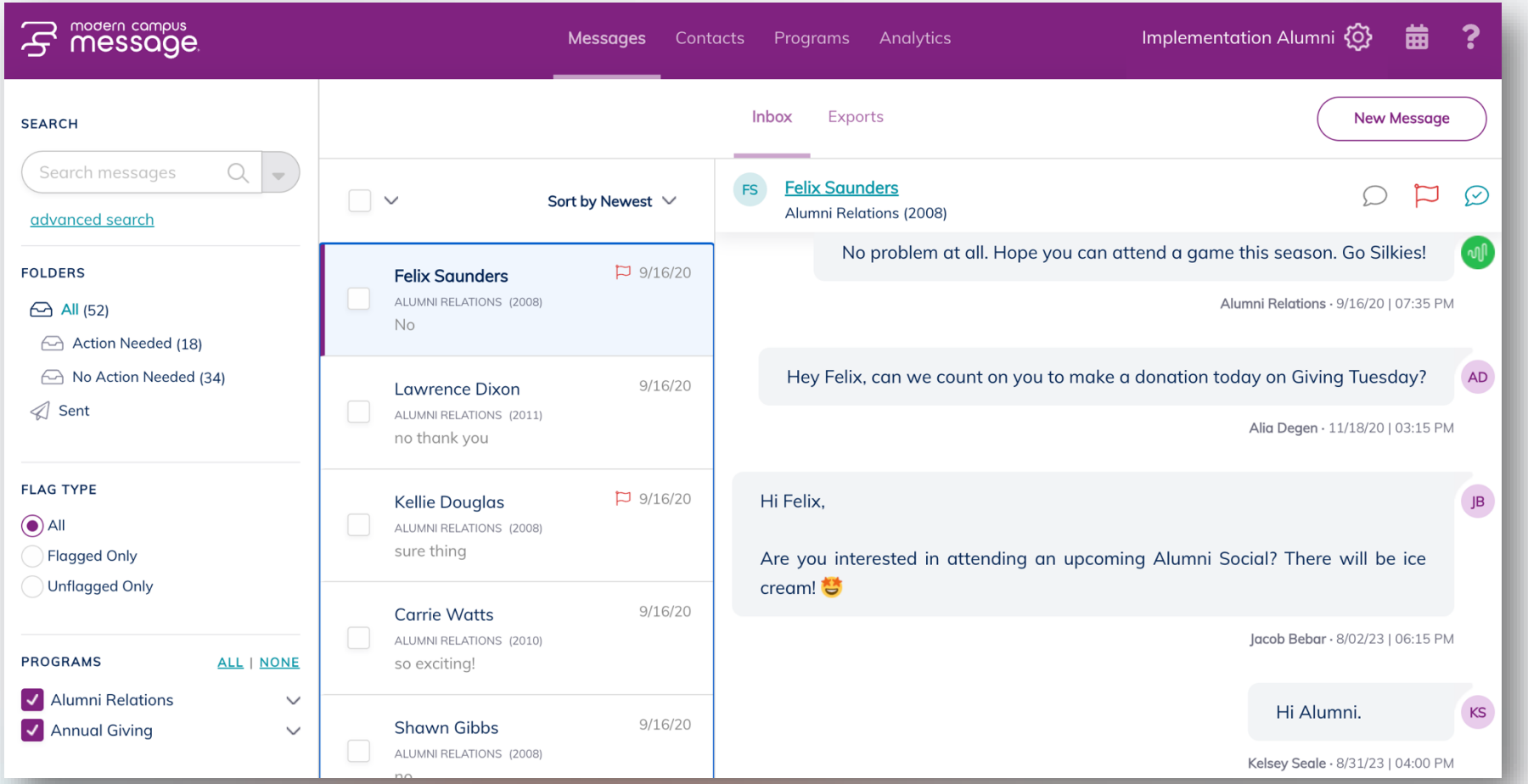
Learn about the platform and what you can do!

Kelsey Seale

Agenda

1. Personal Settings
2. Platform Structure
3. 1-1 Messaging
4. Quick group messaging
5. Advanced Search
6. Copy / Paste from a list
7. Edit contact info
8. Support Options
9. Q&A
10. Close

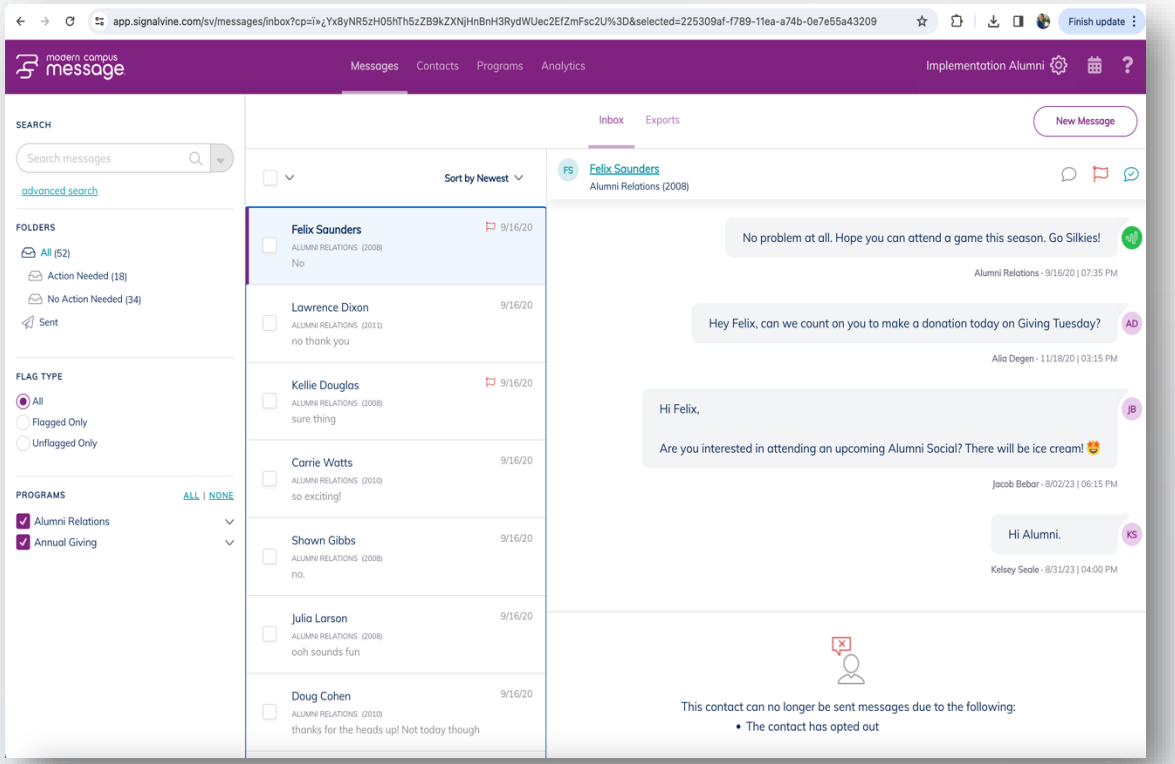
Message for Counselors 101

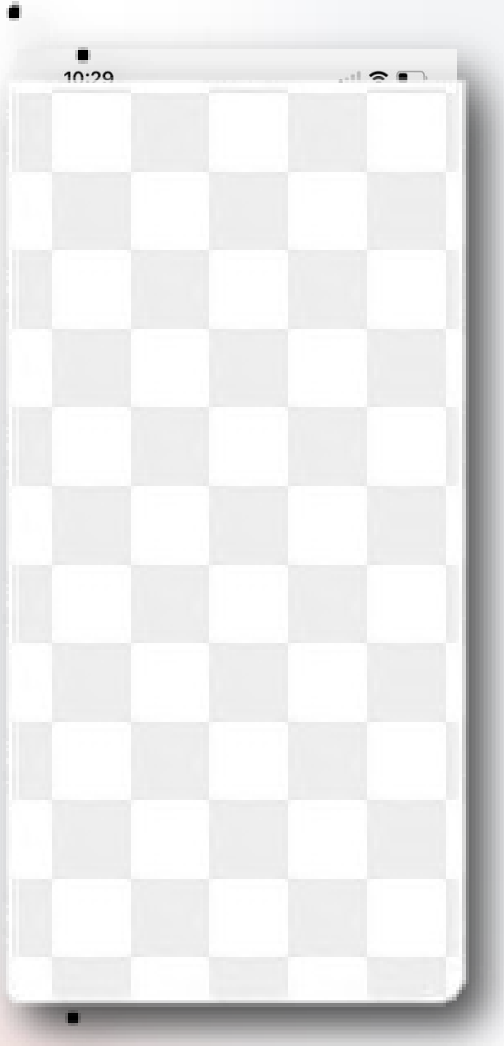


Mobile App

Web App

Search “Modern Campus Message”





Your Role in Message

Account Admin

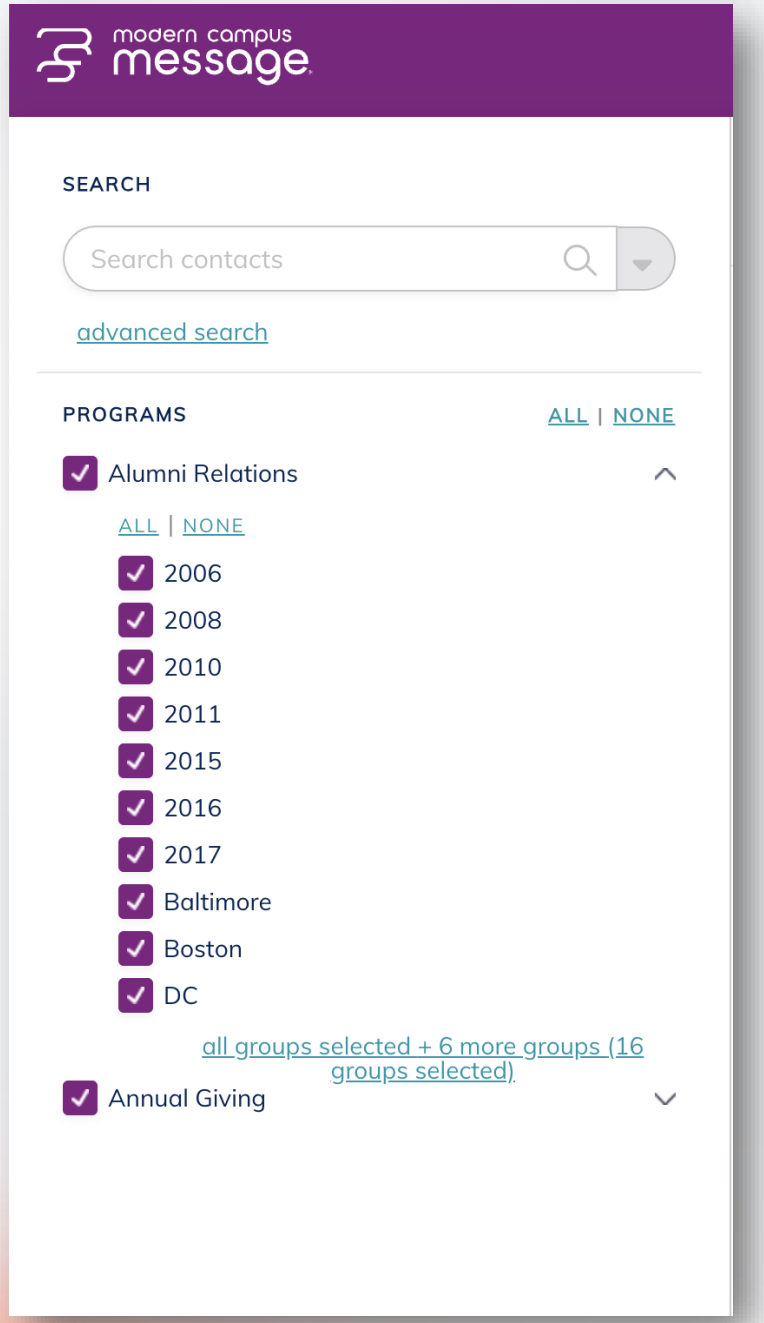
- All student access
- Invite users
- Update settings
- Import data

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



Counselors CAN	Counselors CANNOT
View and message YOUR caseload	View and message all program contacts
Update personal settings	Update program-wide settings
Send messages to custom segments of your contact group	Upload contacts in bulk
Send links, emojis	
Export Contacts into a spreadsheet	
View analytics	
Send individual and group messages	
View personal message calendar	

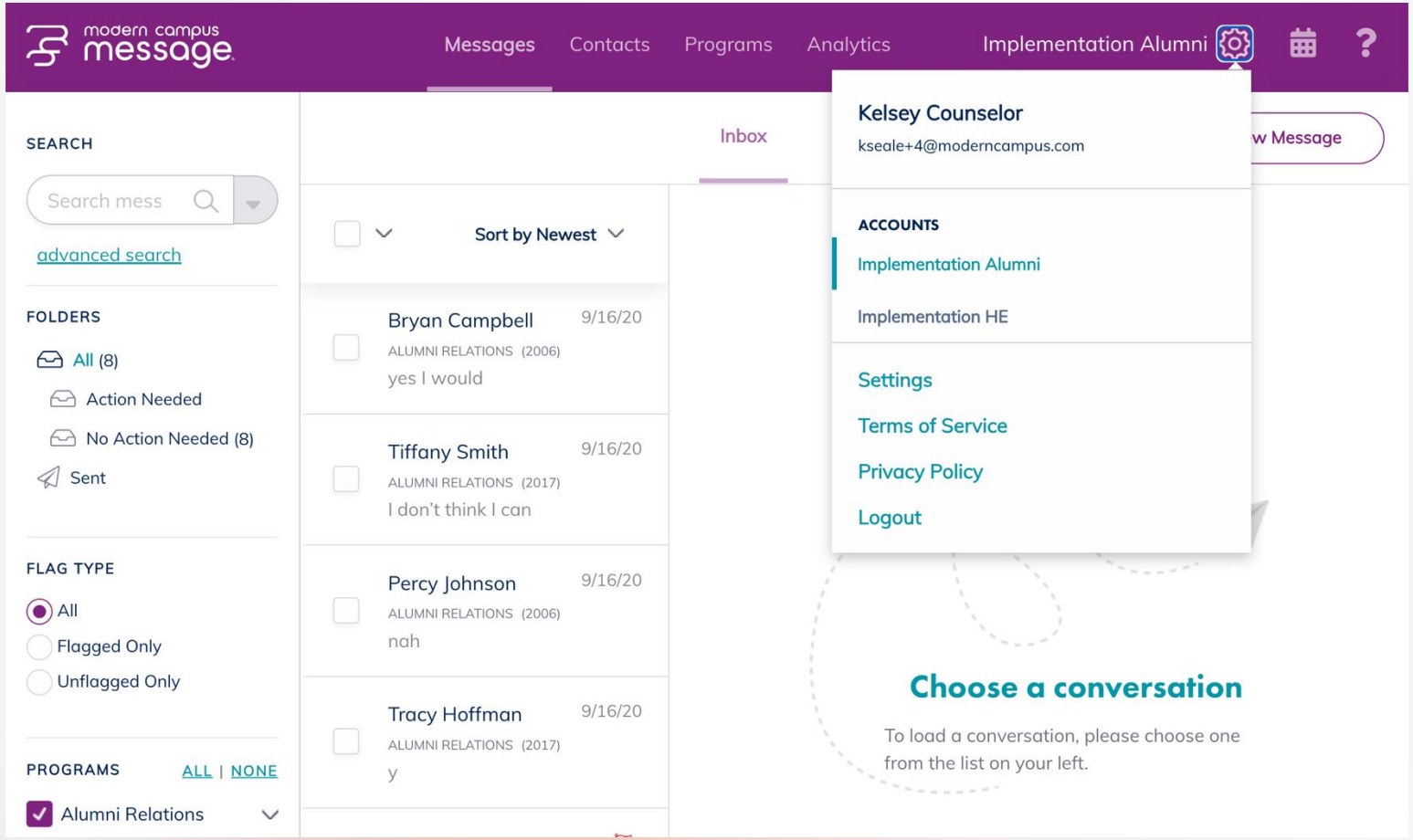
Program by Program Basis

- Send images
- Update contact data
- Add a single contact
- Delete program messages
- Activate contacts

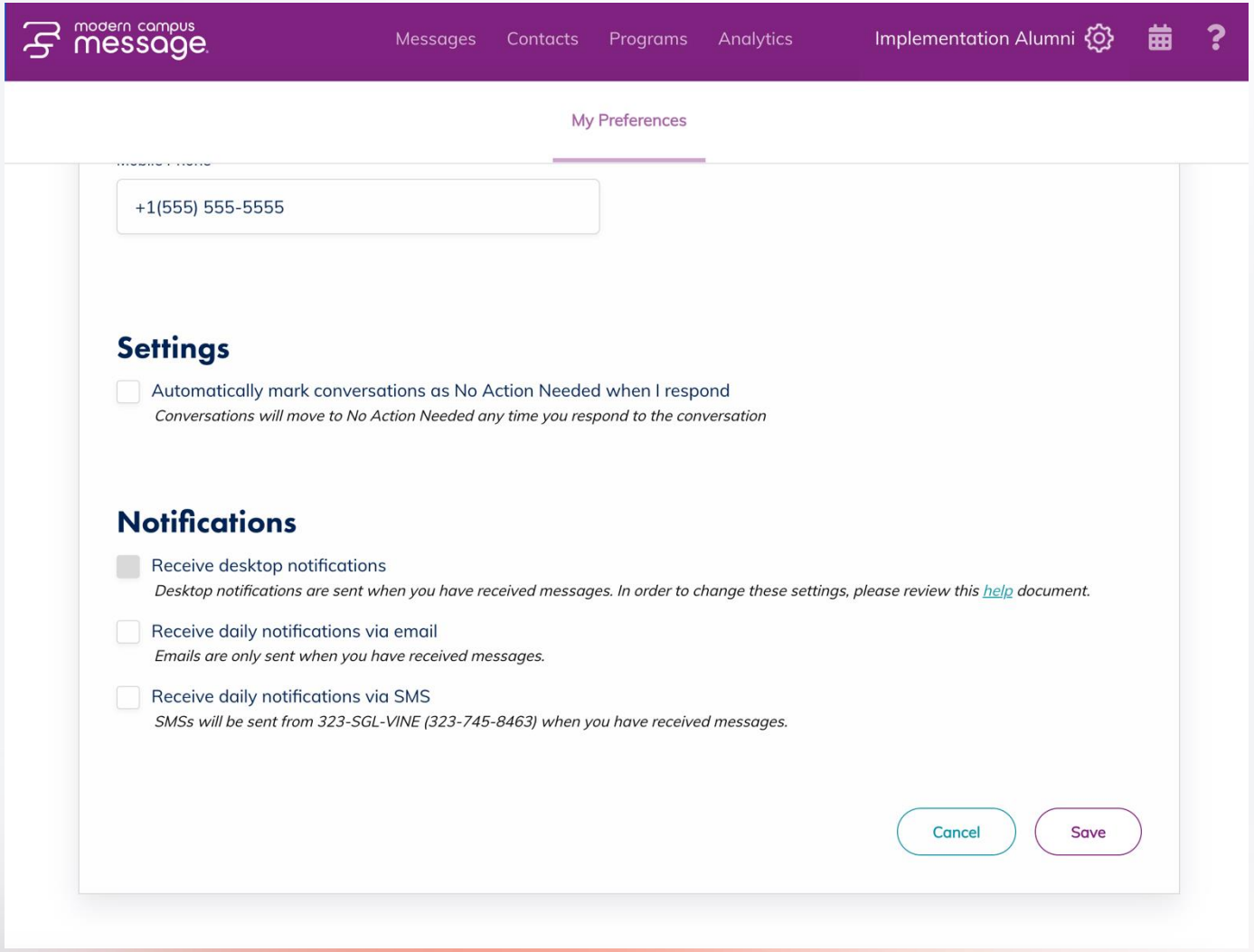
Personal Settings

Inbox preference and notification settings

Navigate to Personal Settings



Automatically mark Conversations as “No Action Needed”

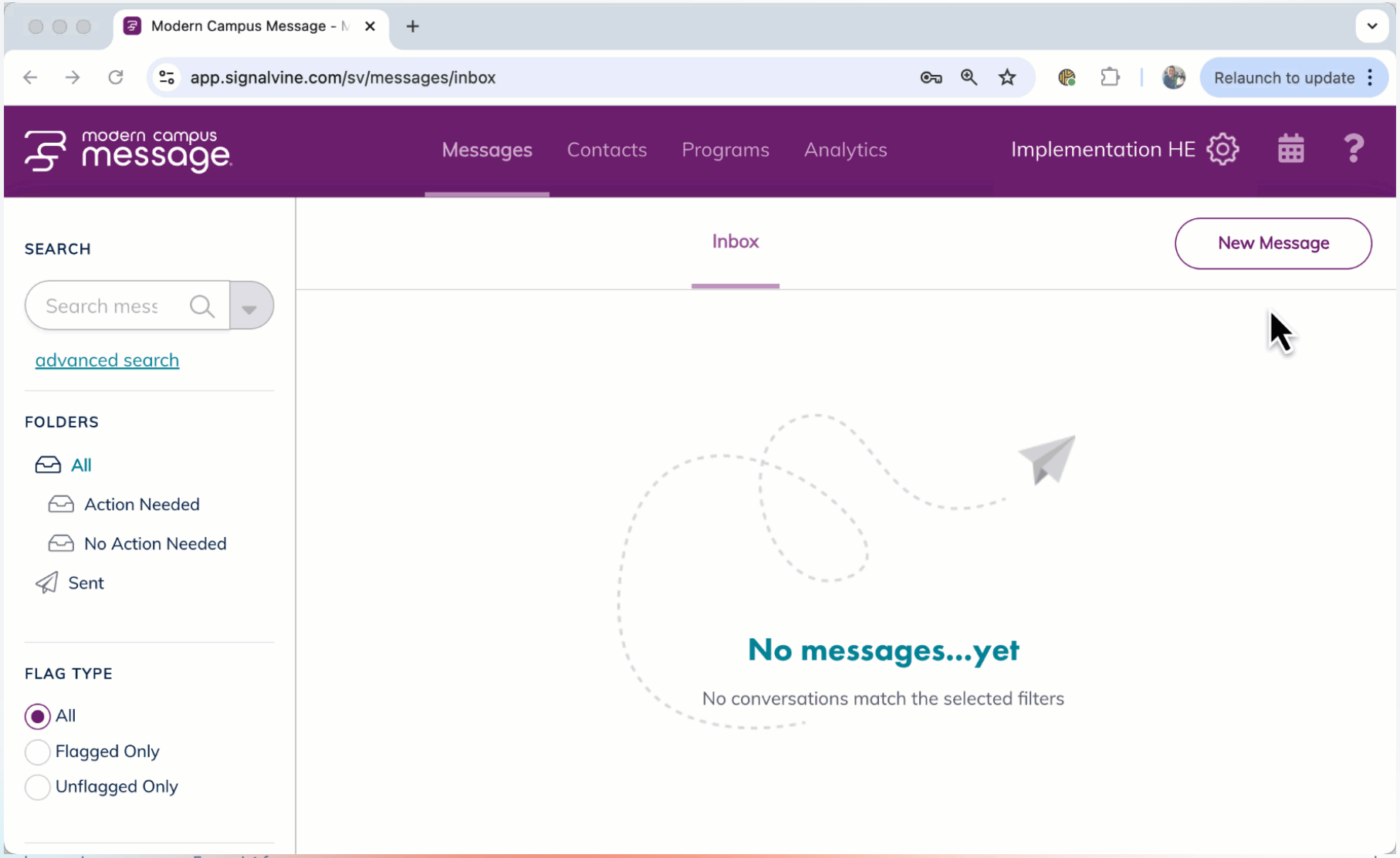


Enable Desktop Notifications

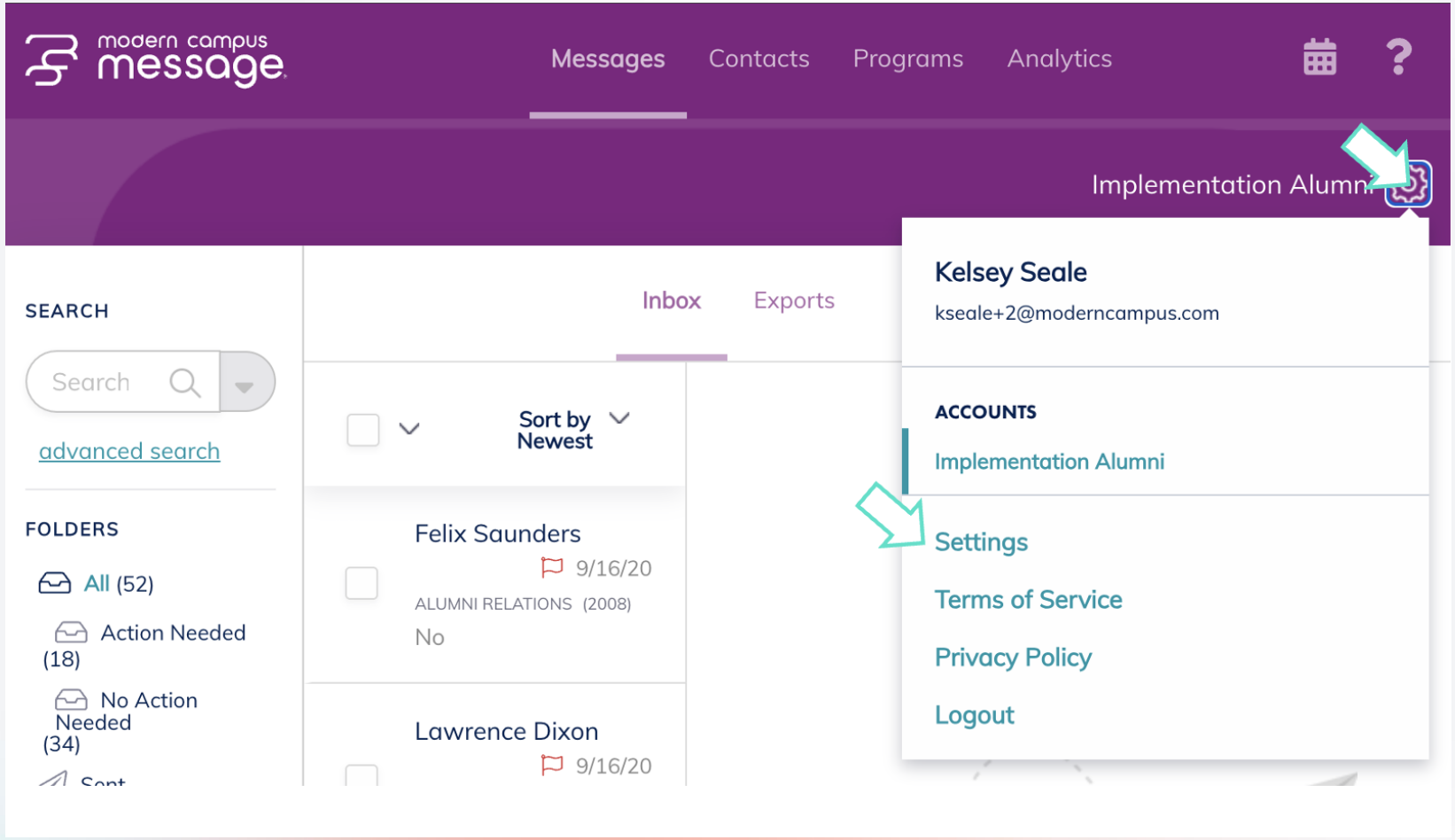
Notification Options

1. **Desktop**
    1. Real time notification of each new text received through Message
    2. Pop-up visible regardless of the tab you are currently using
    3. **Recommended form of notification for quick response**
2. **Email / Text Message:**
    1. Once a day summary of ALL texts, new and historical, received through Message
    2. Choose the notification time and change your preference at any time

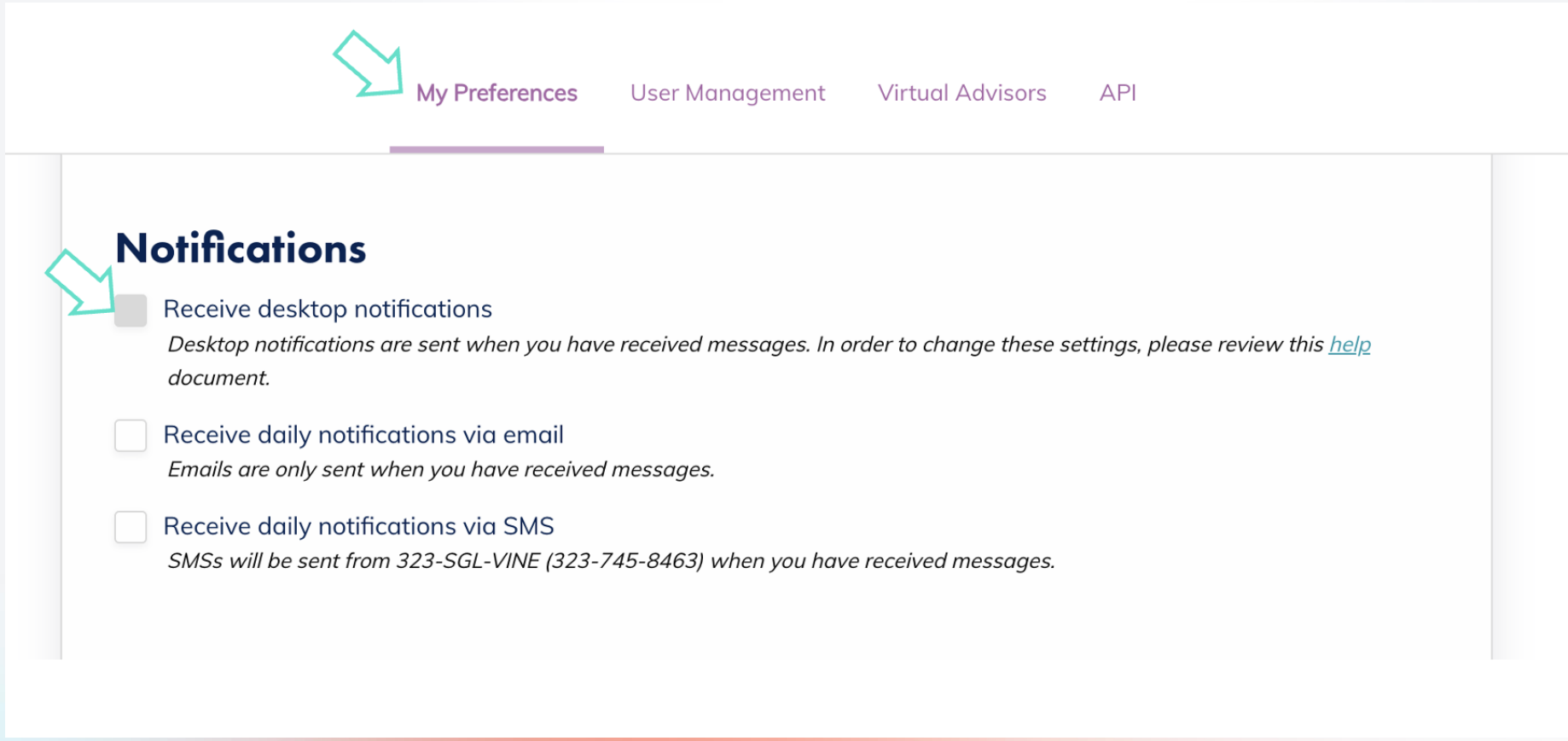
Enable Desktop Notifications .gif



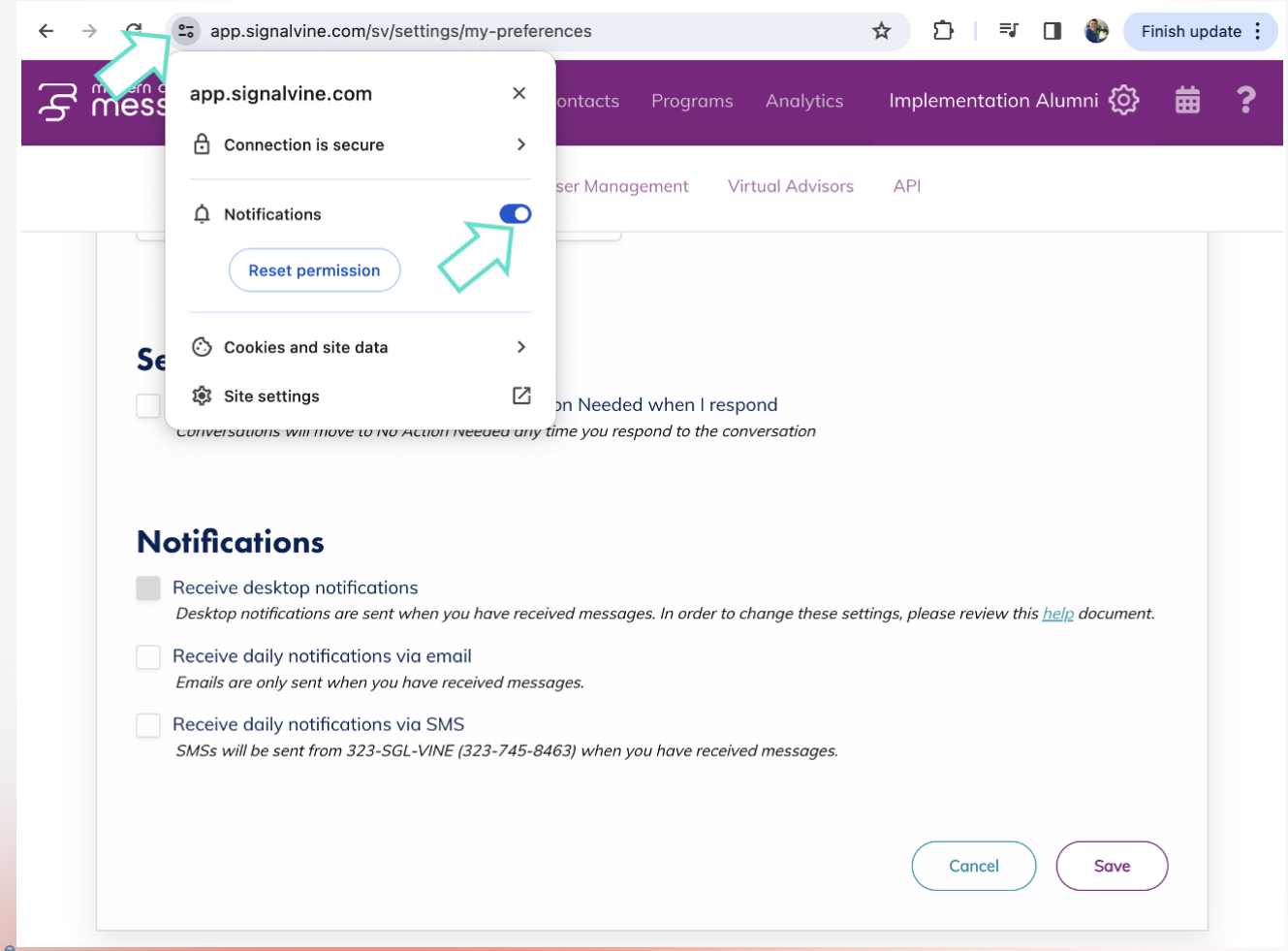
1. Click the gear icon at the top right of your screen and choose **Settings**.



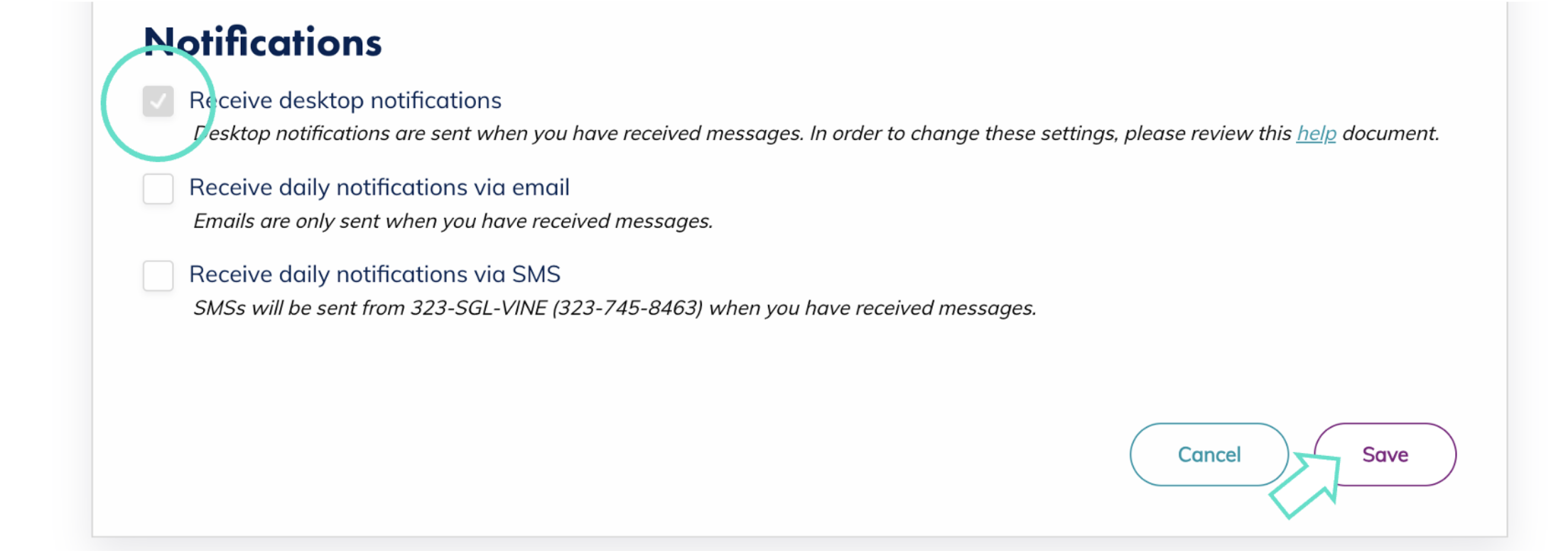
2. Under the **My Preferences** tab scroll to **Notifications**.
3. Check the box next to **Receive desktop notifications**.



3. If that box is greyed out, click the symbol to the left of your URL. This could look like two circles and two lines or a lock symbol.
4. Toggle on to allow notifications.



5. Click out of the menu and hit **Save** at the bottom right of your screen.



Platform Structure

SEARCH

Search messages

advanced search

FOLDERS

- All (52)
  - Action Needed (18)
  - No Action Needed (34)
- Sent

FLAG TYPE

- (•) All
- ( ) Flagged Only
- ( ) Unflagged Only

PROGRAMS ALL | NONE

- [x] Alumni Relations
- [x] Annual Giving

Inbox | Exports

New Message

Sort by Newest

Felix Saunders ALUMNI RELATIONS (2008) No	9/16/20
Lawrence Dixon ALUMNI RELATIONS (2011) no thank you	9/16/20
Kellie Douglas ALUMNI RELATIONS (2008) sure thing	9/16/20
Carrie Watts ALUMNI RELATIONS (2010) so exciting!	9/16/20
Shawn Gibbs ALUMNI RELATIONS (2008) no.	9/16/20
Julia Larson ALUMNI RELATIONS (2008) ooh sounds fun	9/16/20
Doug Cohen ALUMNI RELATIONS (2010) thanks for the heads up! Not today though	9/16/20

FS Felix Saunders
Alumni Relations (2008)

No problem at all. Hope you can attend a game this season. Go Silkies!

Alumni Relations · 9/16/20 | 07:35 PM

Hey Felix, can we count on you to make a donation today on Giving Tuesday? AD

Alia Degen · 11/18/20 | 03:15 PM

Hi Felix,

Are you interested in attending an upcoming Alumni Social? There will be ice cream! 😻 JB

Jacob Bebar · 8/02/23 | 06:15 PM

Hi Alumni. KS

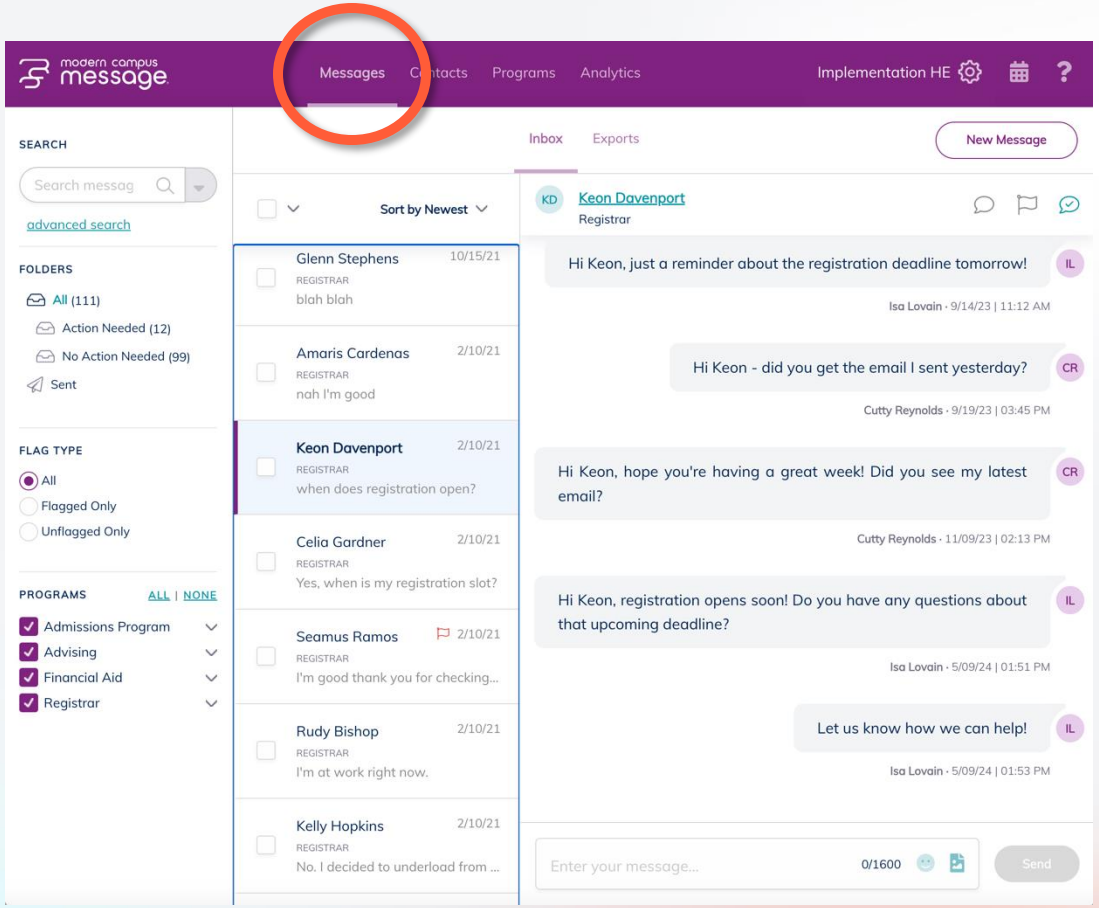
Kelsey Seale · 8/31/23 | 04:00 PM

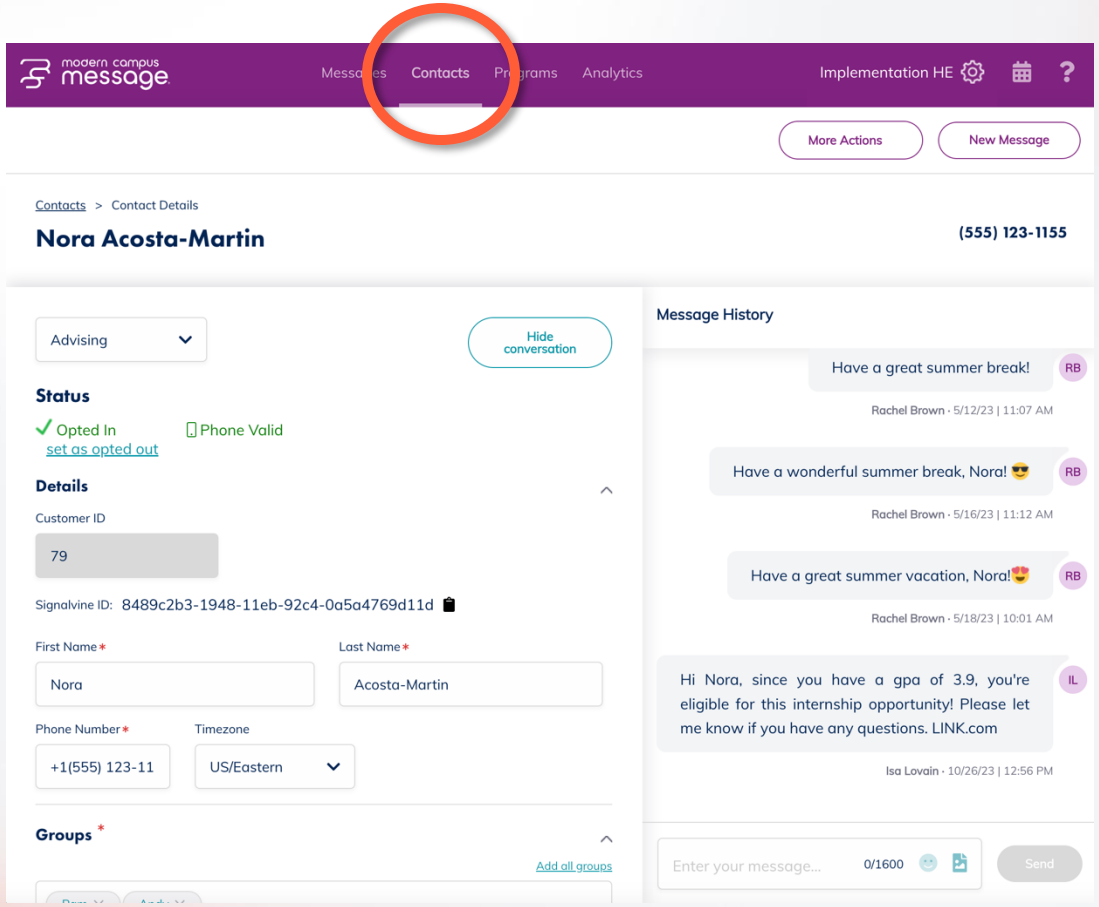
This contact can no longer be sent messages due to the following:

- The contact has opted out

One-on-one Messaging

Texting One-on-one

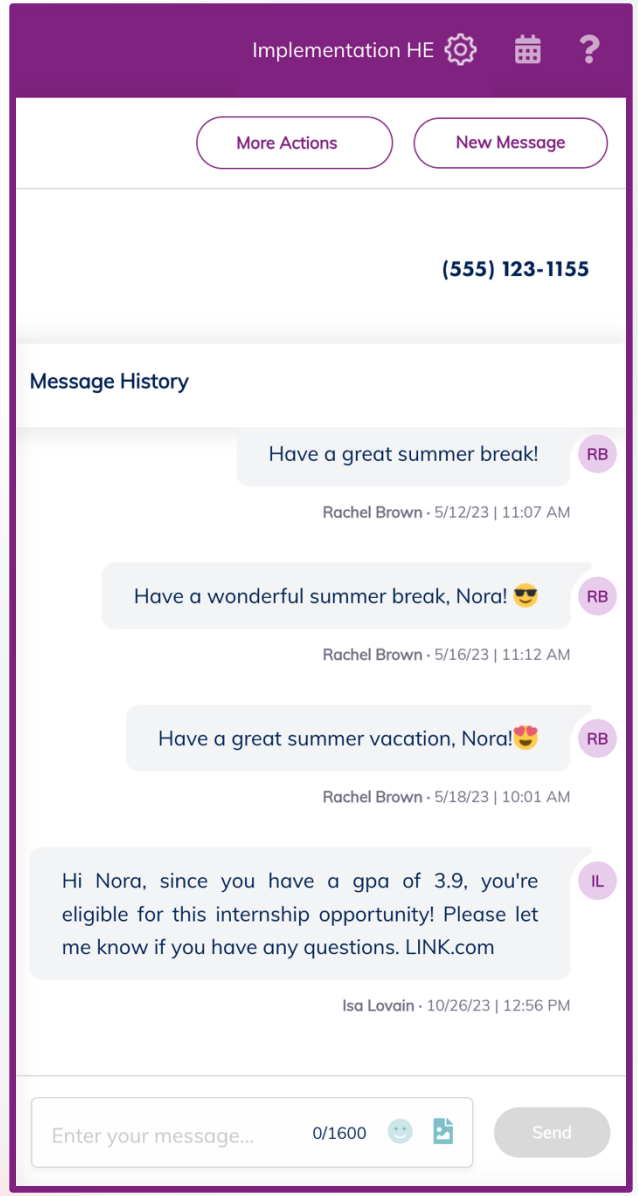




One-on-on Messages

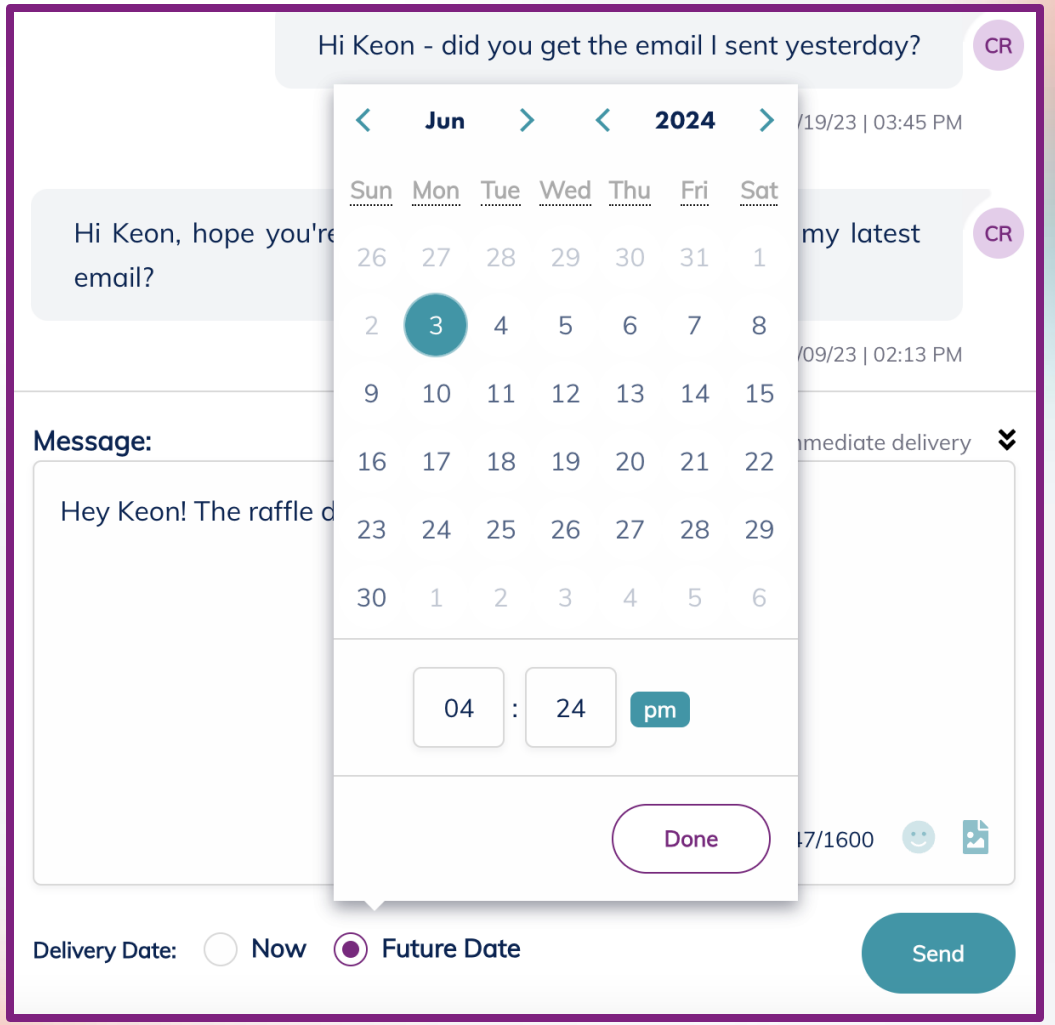
- Method 1
  - Select contact from the **Messages** inbox
  - Text from the bottom right corner

- Method 2
  - Select the **Contacts** tab
  - Search for your Contact
  - Select their name
  - Text from the bottom right corner



Schedule One-on-on Messages

- Write your message
- Select **Future Date**
- Click **Send**
- Check your scheduled message on the new tab that appears in your conversation!



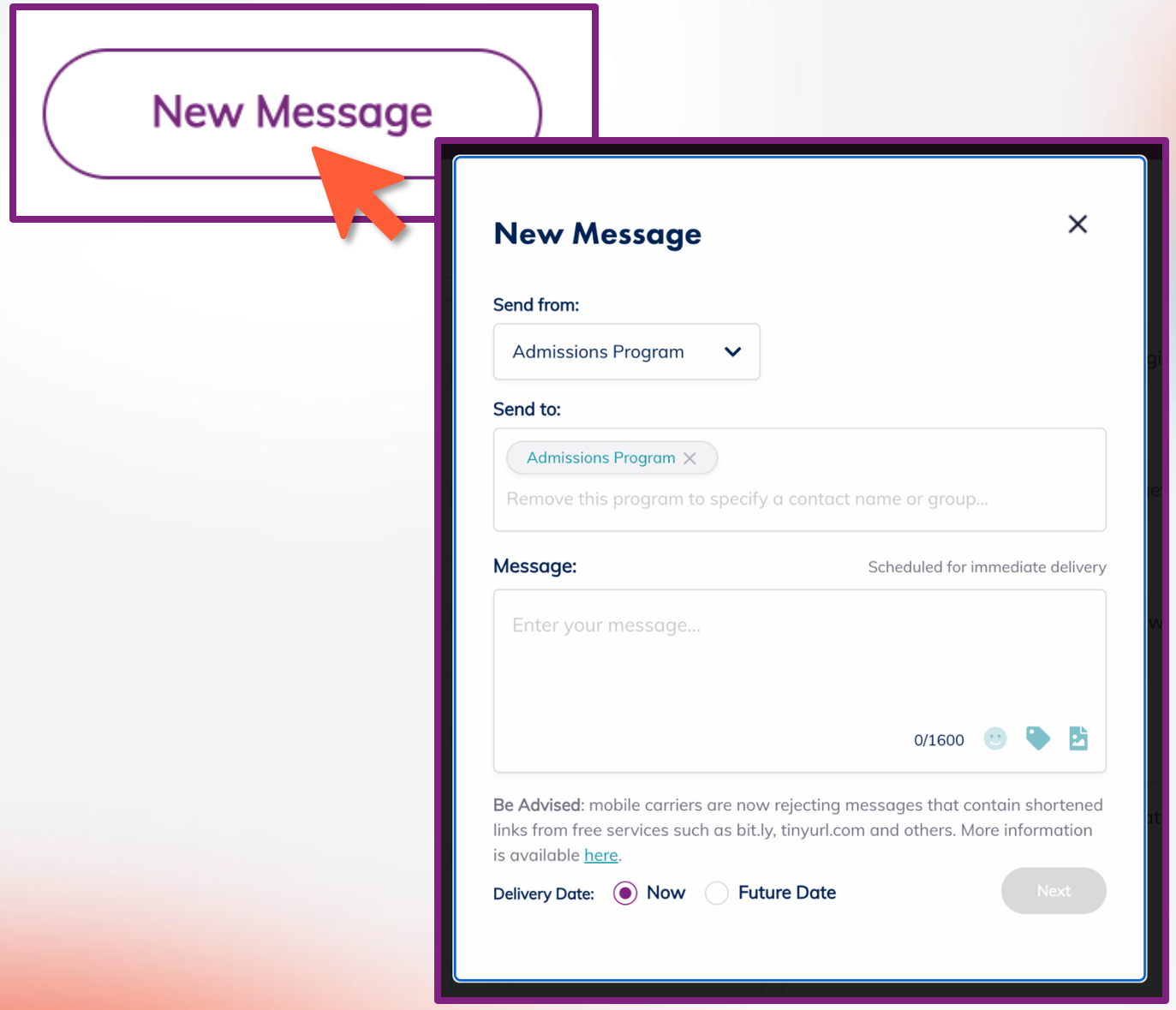
When to use One-on-one Messages

1. Info relevant to only person
2. Info that's sensitive
3. Personal question
4. Message response

“New Message” Quick Group

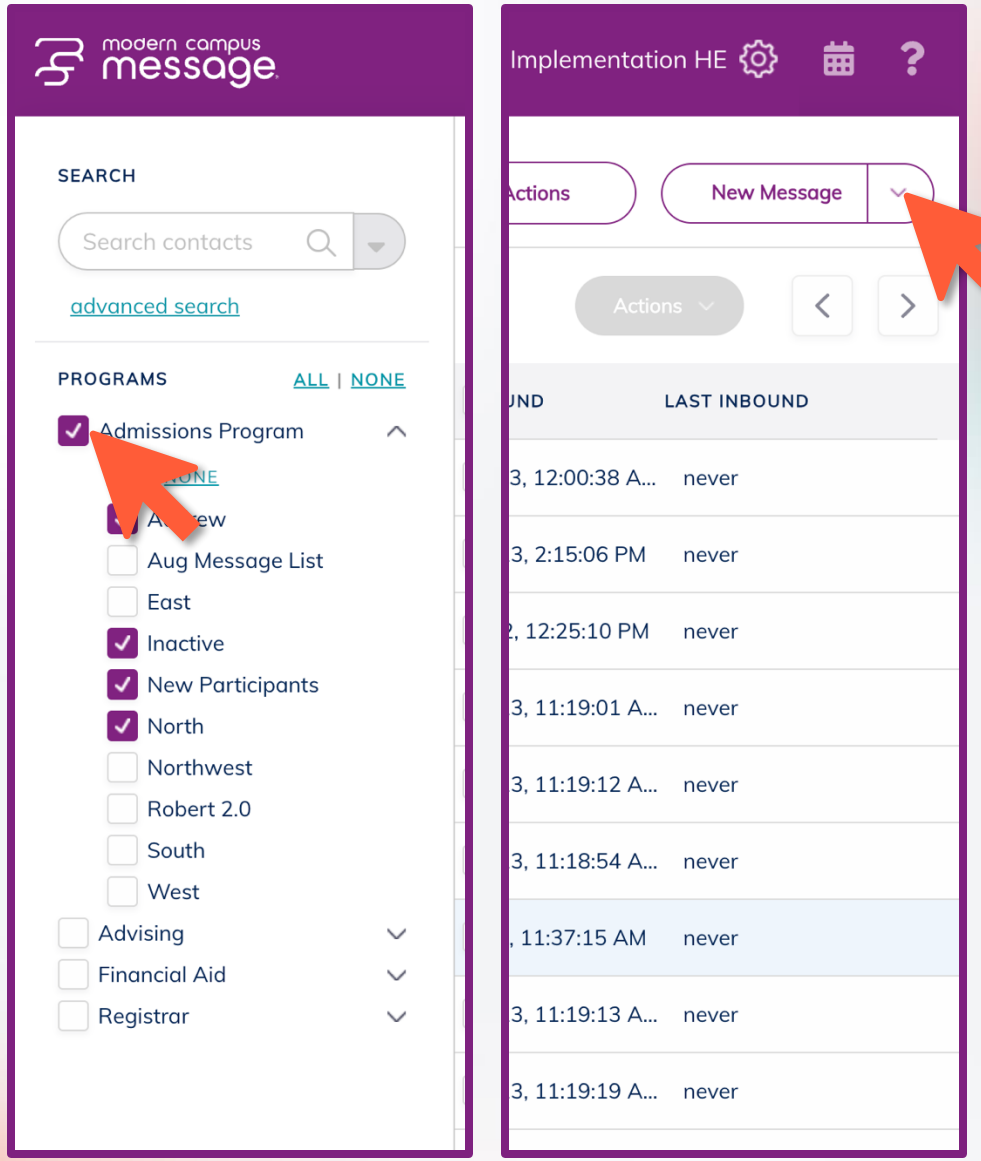
Quick Bulk

- Select **New Message**
- Select program
- Optional, narrow down by group(s)



Extra Quick Quick Bulk

- Narrow down program and group on the left menu
- Select he **Arrow** next to **New Message**
- Write and send/schedule your message!



When to use Quick Bulk

1. One-time announcements
2. Question for a specific audience
3. Reminder about an event
4. Reminder about a form

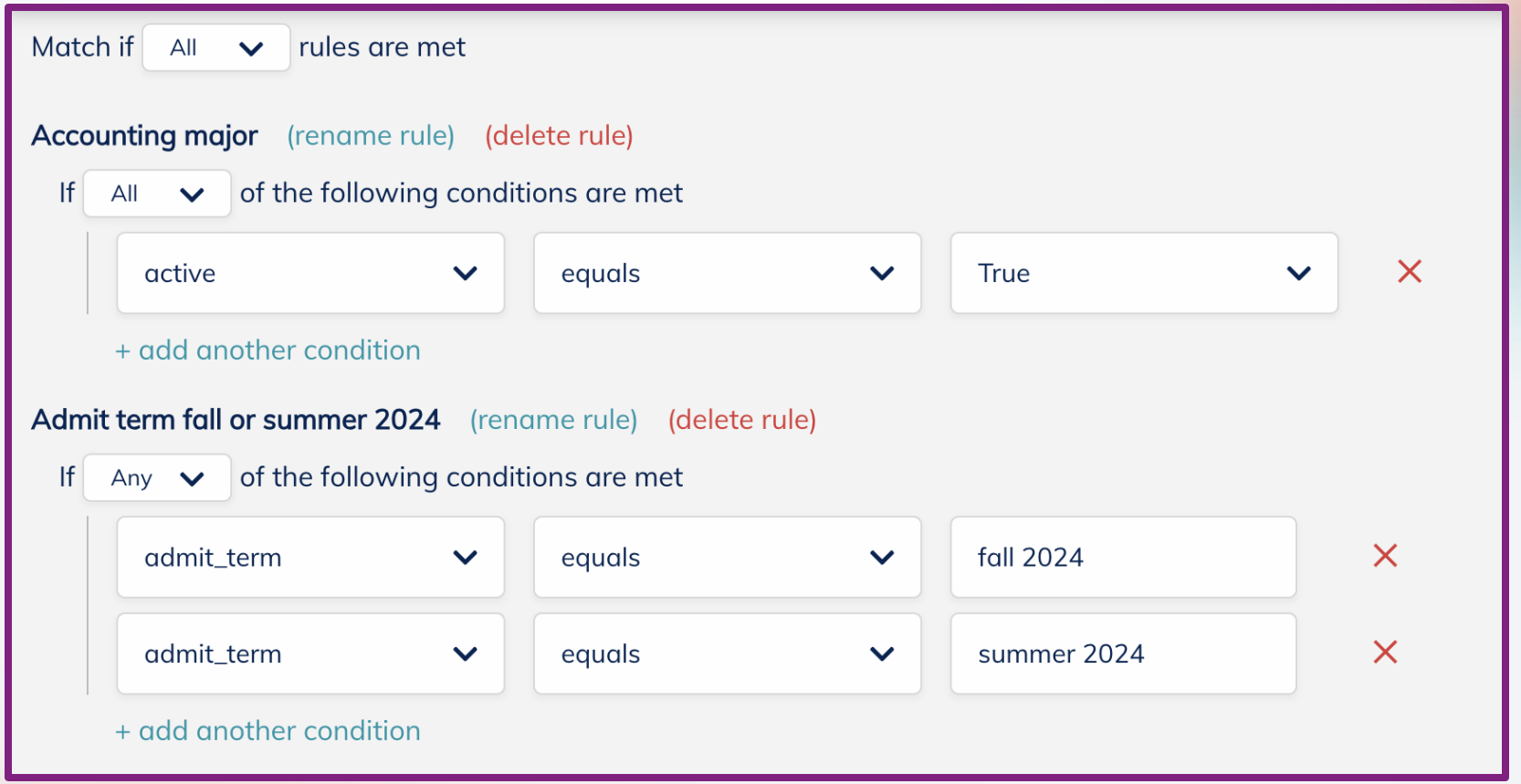
Make use of…

- Program and group segmentation
- Personalization fields (first_name, location, credential etc.)

Advanced Search

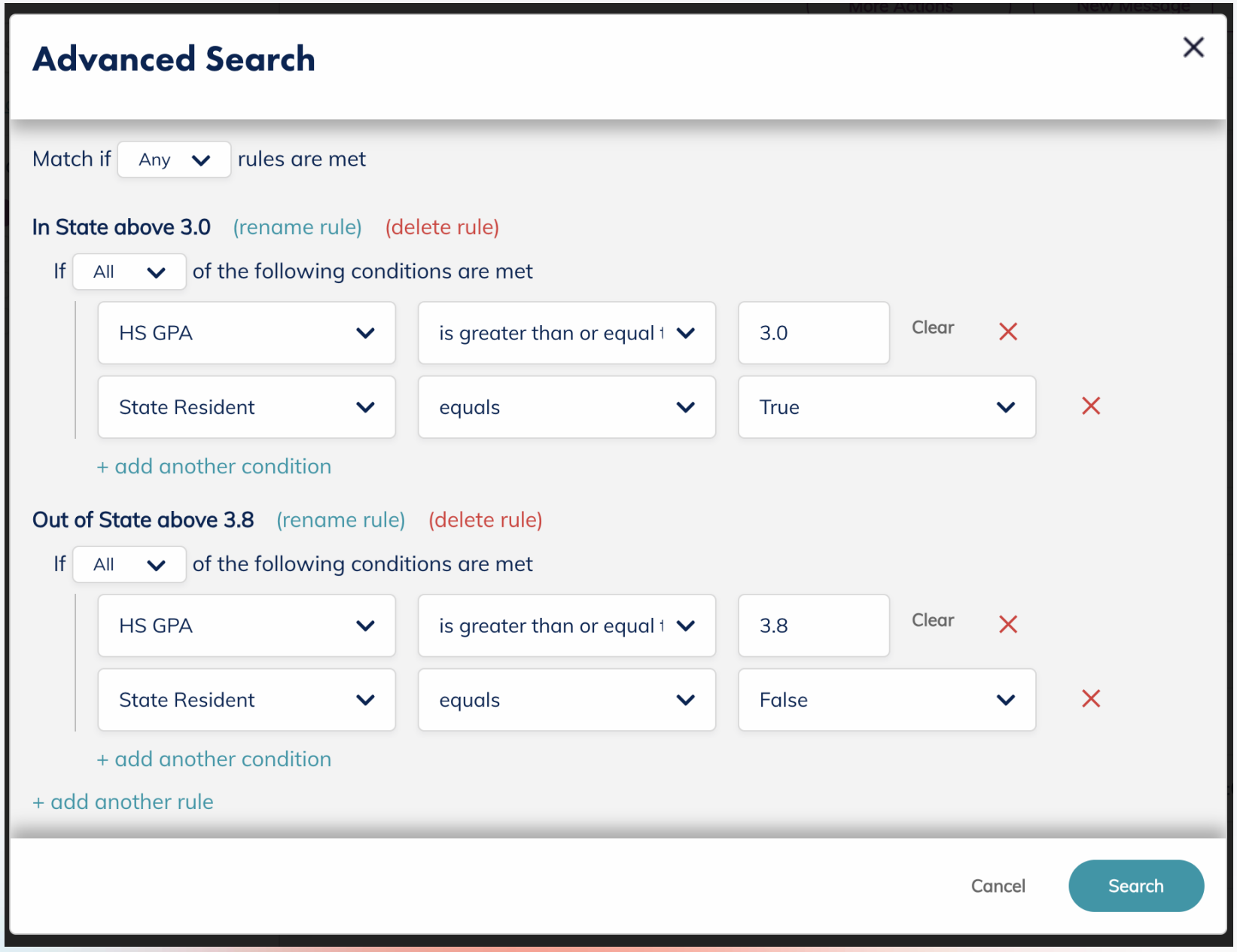
Advanced Search

- Hyper-segment your contacts using data
- And/or search functions



New Scholarship Alert!

- We have a new scholarship opportunity available to both in and out-of-state students!
- The criteria are different depending on where you're from
  - In state – 3.0 and above
  - Out of state – 3.5 and above


Advanced Search
Match if Any rules are met
In State above 3.0 (rename rule) (delete rule)
If All of the following conditions are met
HS GPA
is greater than or equal t
3.0
Clear
State Resident
equals
True
+ add another condition
Out of State above 3.8 (rename rule) (delete rule)
If All of the following conditions are met
HS GPA
is greater than or equal t
3.8
Clear
State Resident
equals
False
+ add another condition
+ add another rule
Cancel
Search

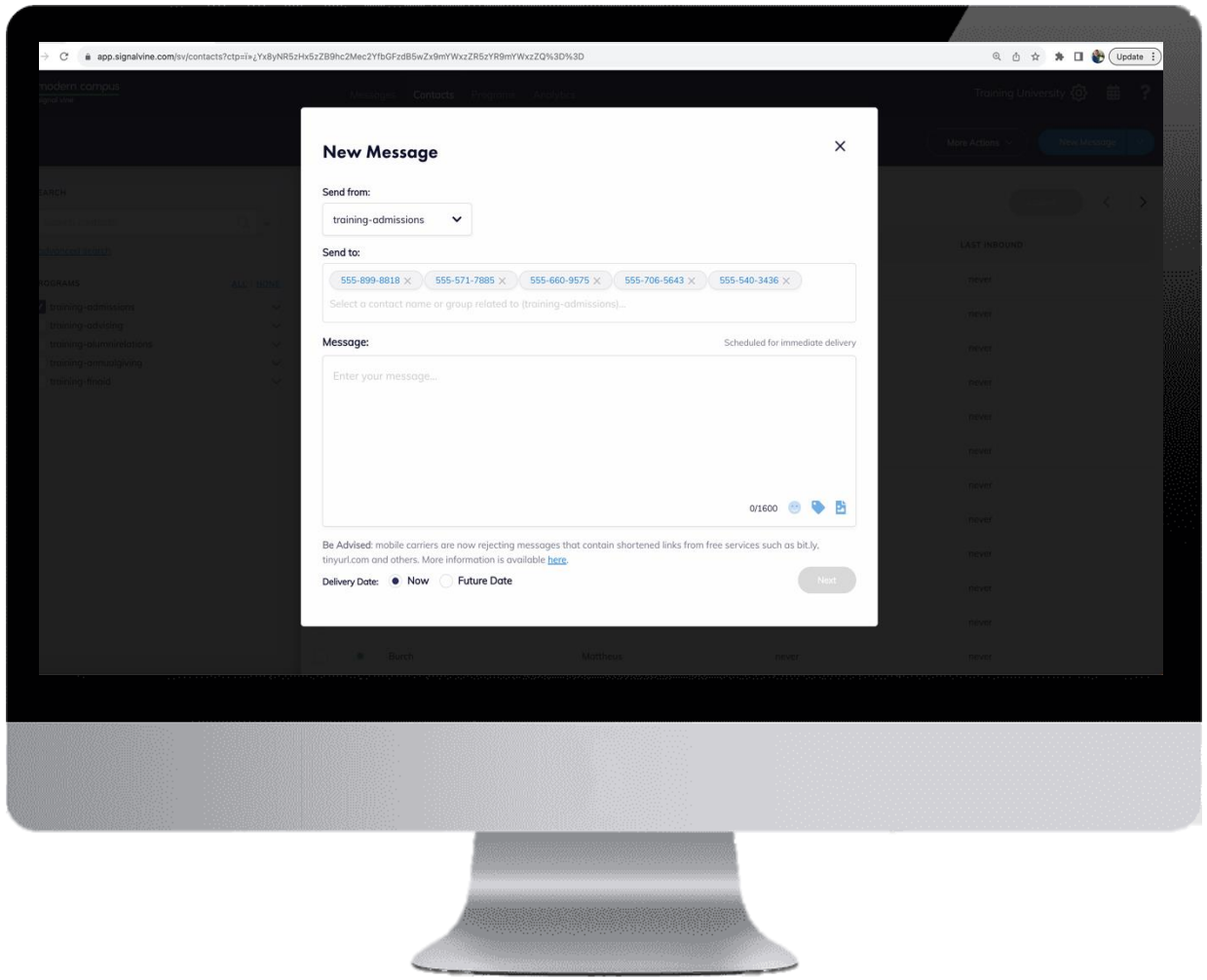
When to use Advanced Search

1. You want to use data to target contacts
2. You don't want to send to ALL members of a program or group
3. You want to send at a specific time / date
4. Examples
    1. Text all contacts in Philadelphia
    2. Text all Chemistry & Biology majors with a 3.0 or higher

Bulk Copy+Paste

Copy and Paste a List

- Copy a comma separated list of phone numbers or ID numbers directly into "Send to:"



Comma Separated List

NOT Comma Separated ❌

Germain	Duplock	555-899-8818
Morten	Crumbie	555-571-7885
Neala	Dabney	555-660-9575
Sterne	Measham	555-706-5643
Erie	Tilbrook	555-540-3436

Comma Separated ✅

Germain	Duplock	555-899-8818,
Morten	Crumbie	555-571-7885,
Neala	Dabney	555-660-9575,
Sterne	Measham	555-706-5643,
Erie	Tilbrook	555-540-3436,

NOT Comma Separated ✗

Germain	Duplock	555-899-8818
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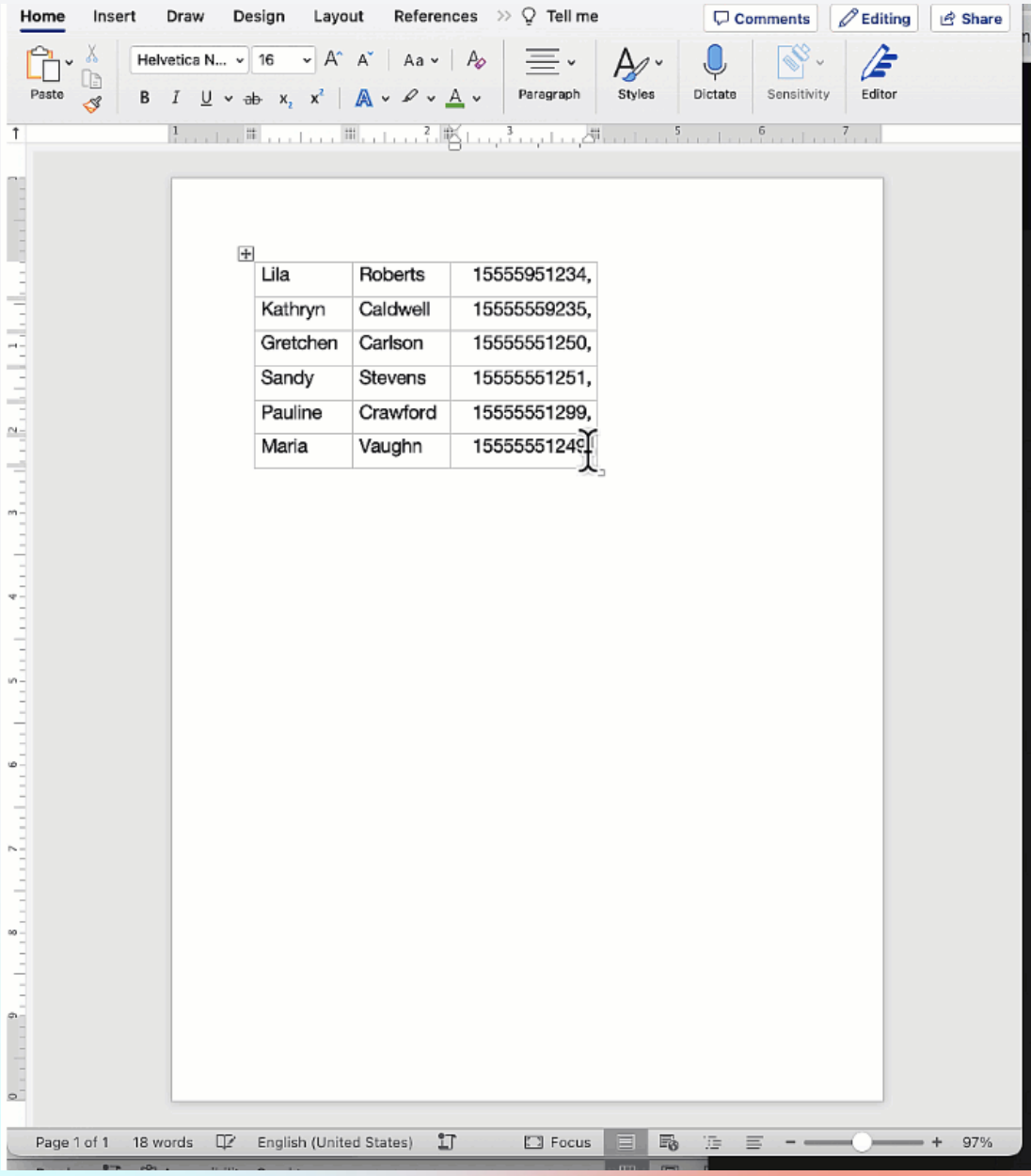
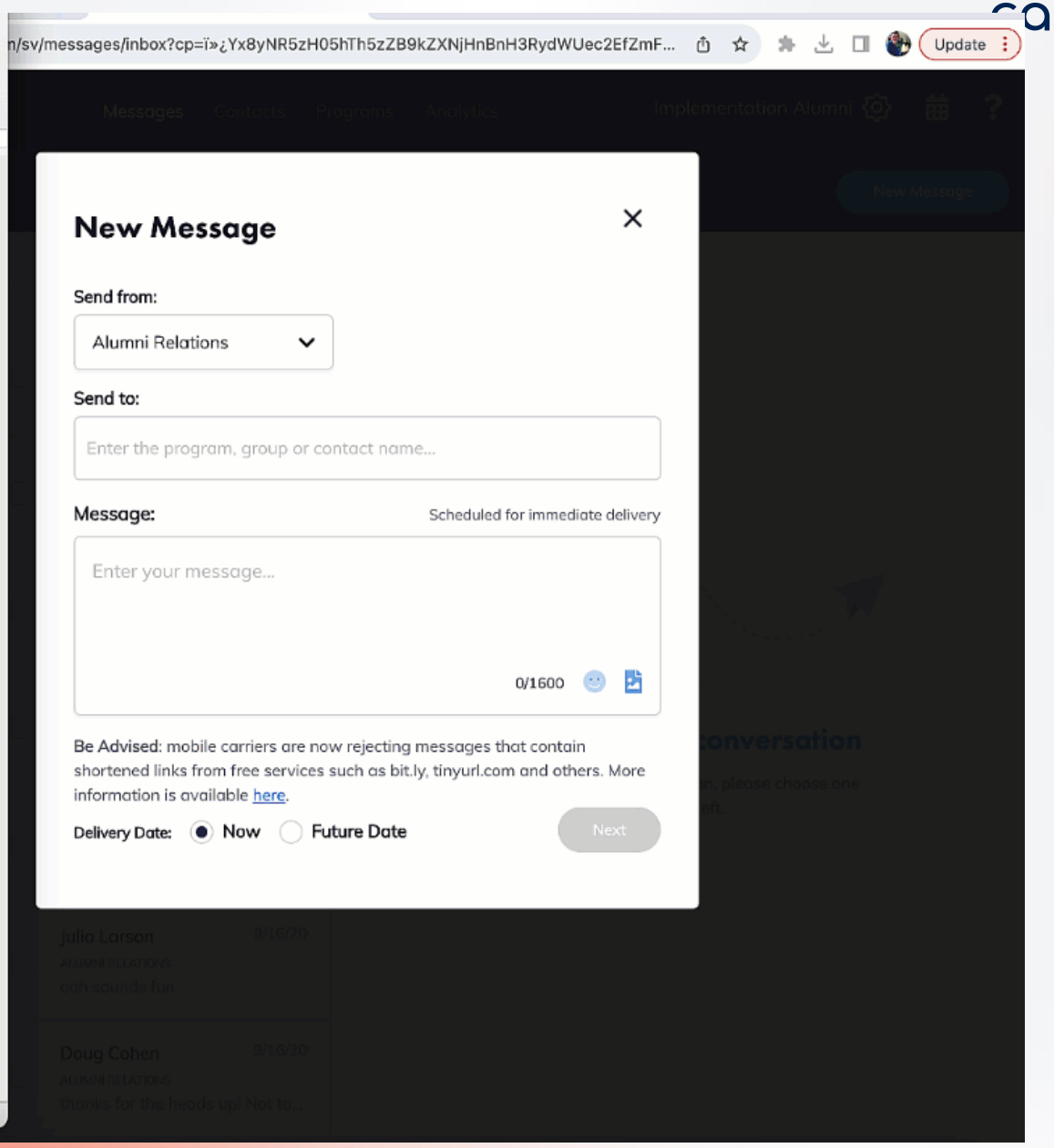
Sterne	Measham	555-706-5643
Erie	Tilbrook	555-540-3436

Comma Separated ✅

Germain	Duplock	555-899-8818,
Morten	Crumbie	555-571-7885,
Neala	Dabney	555-660-9575,
Sterne	Measham	555-706-5643,
Erie	Tilbrook	555-540-3436,


Home
Insert
Draw
Design
Layout
References
Tell me
Comments
Editing
Share
Paste
Helvetica N...
16
Paragraph
Styles
Dictate
Sensitivity
Editor
Lila Roberts 15555951234,
Kathryn Caldwell 15555559235,
Gretchen Carlson 15555551250,
Sandy Stevens 15555551251,
Pauline Crawford 15555551299,
Maria Vaughn 1555555124
Page 1 of 1
18 words
English (United States)
Focus
97%


Update
Messages
Contacts
Programs
Analytics
Implementation Alumni
New Message
Send from:
Alumni Relations
Send to:
Enter the program, group or contact name...
Message:
Scheduled for immediate delivery
Enter your message...
0/1600
Be Advised: mobile carriers are now rejecting messages that contain shortened links from free services such as bit.ly, tinyurl.com and others. More information is available here.
Delivery Date:
Now
Future Date
Next

When to use Bulk Copy+Paste

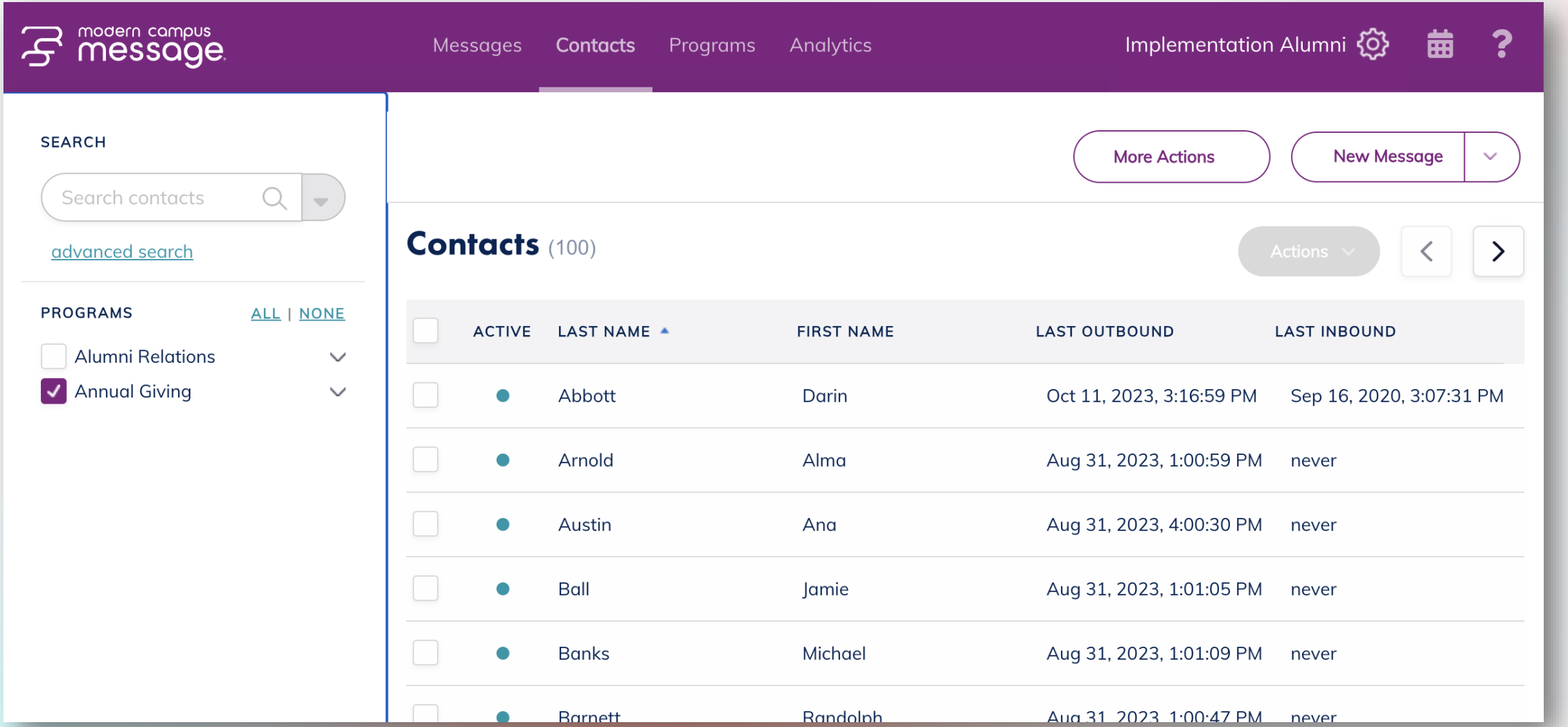
- You have a list of phone numbers or ID numbers
- You don't need to save the group or other data
- Examples
  - Follow up after an event
  - Pulled a report of student leaders

Poll #2

What type of messages do you plan on sending?

How are you feeling so far about Message?

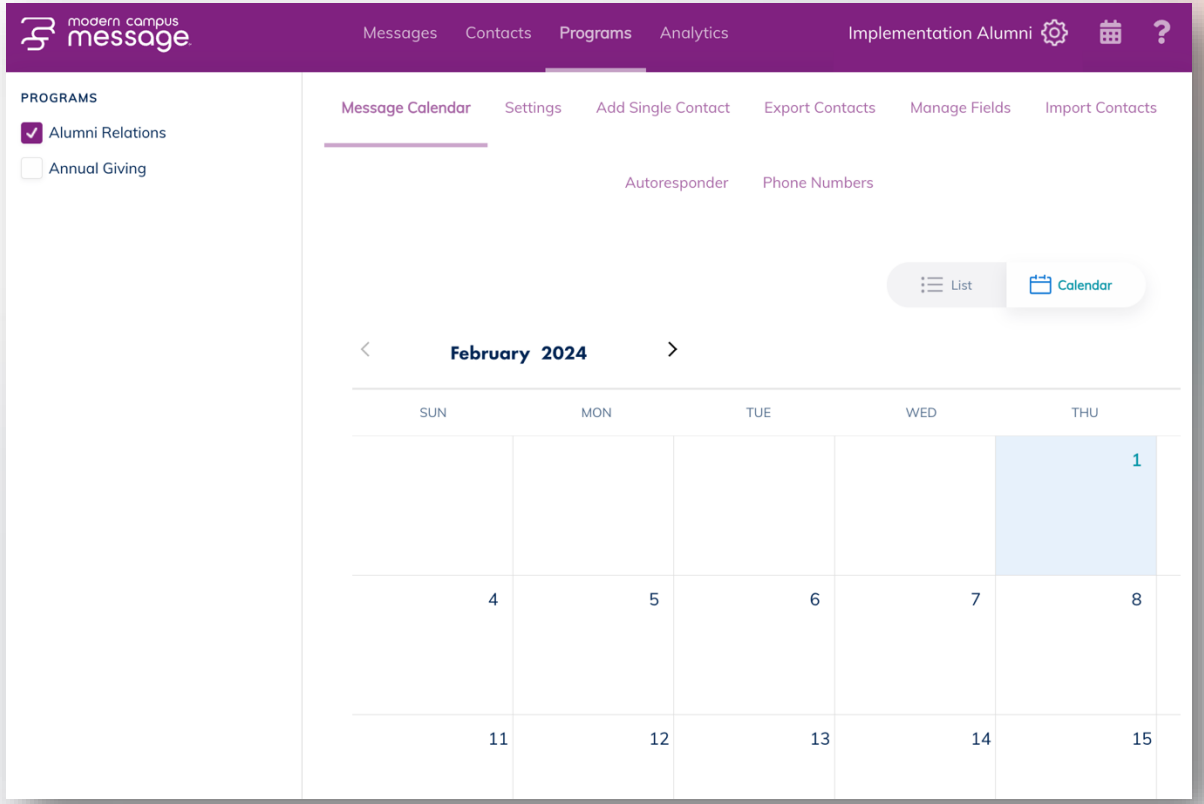
Contacts Tab



Programs Tab

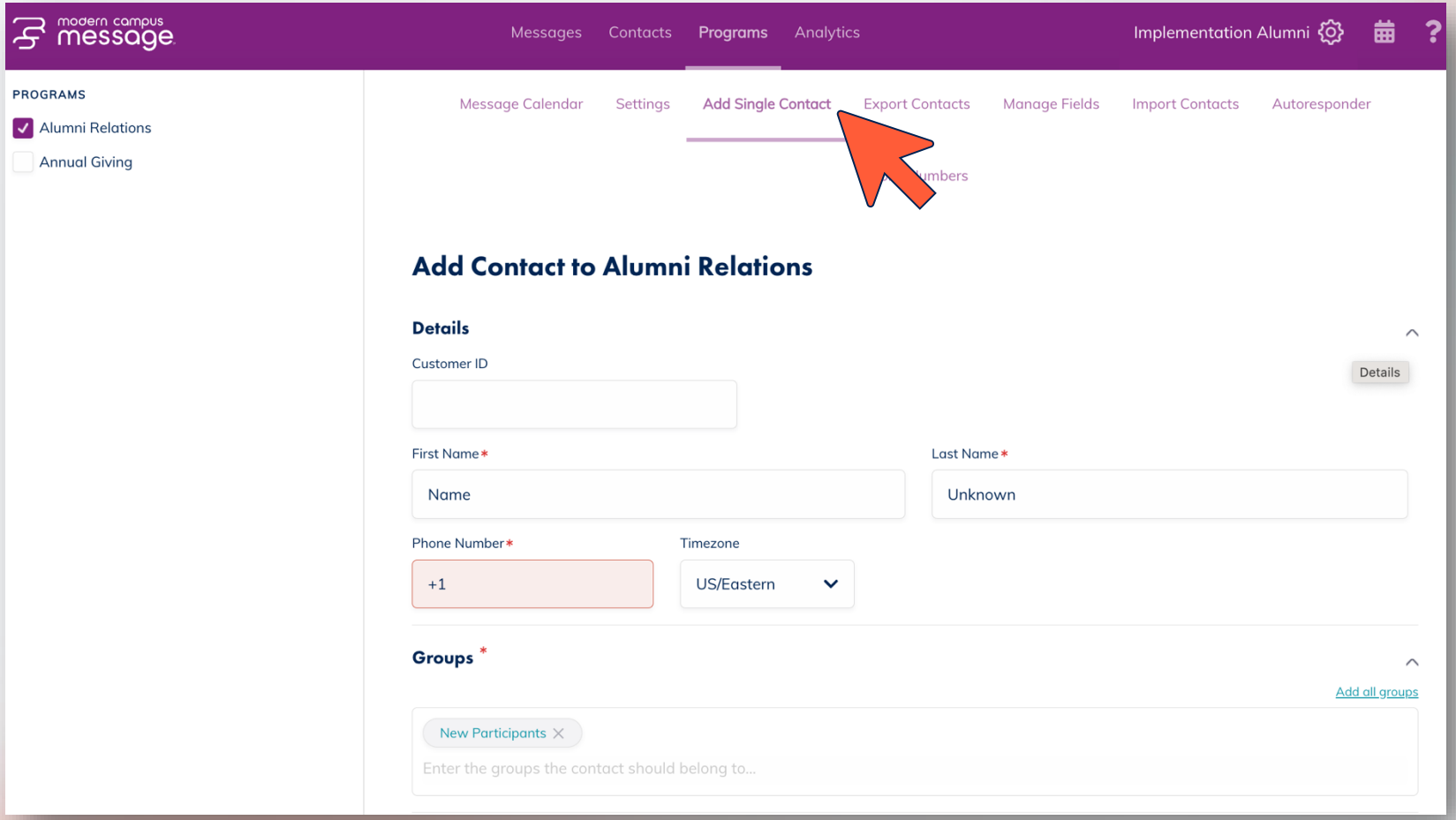
Message Calendar

- Shows messages scheduled for 2+ contacts
- Shows scheduled messages for YOUR caseload
- You can edit / delete messages
- DO NOT edit Program Messages (anything you set up with customer support)



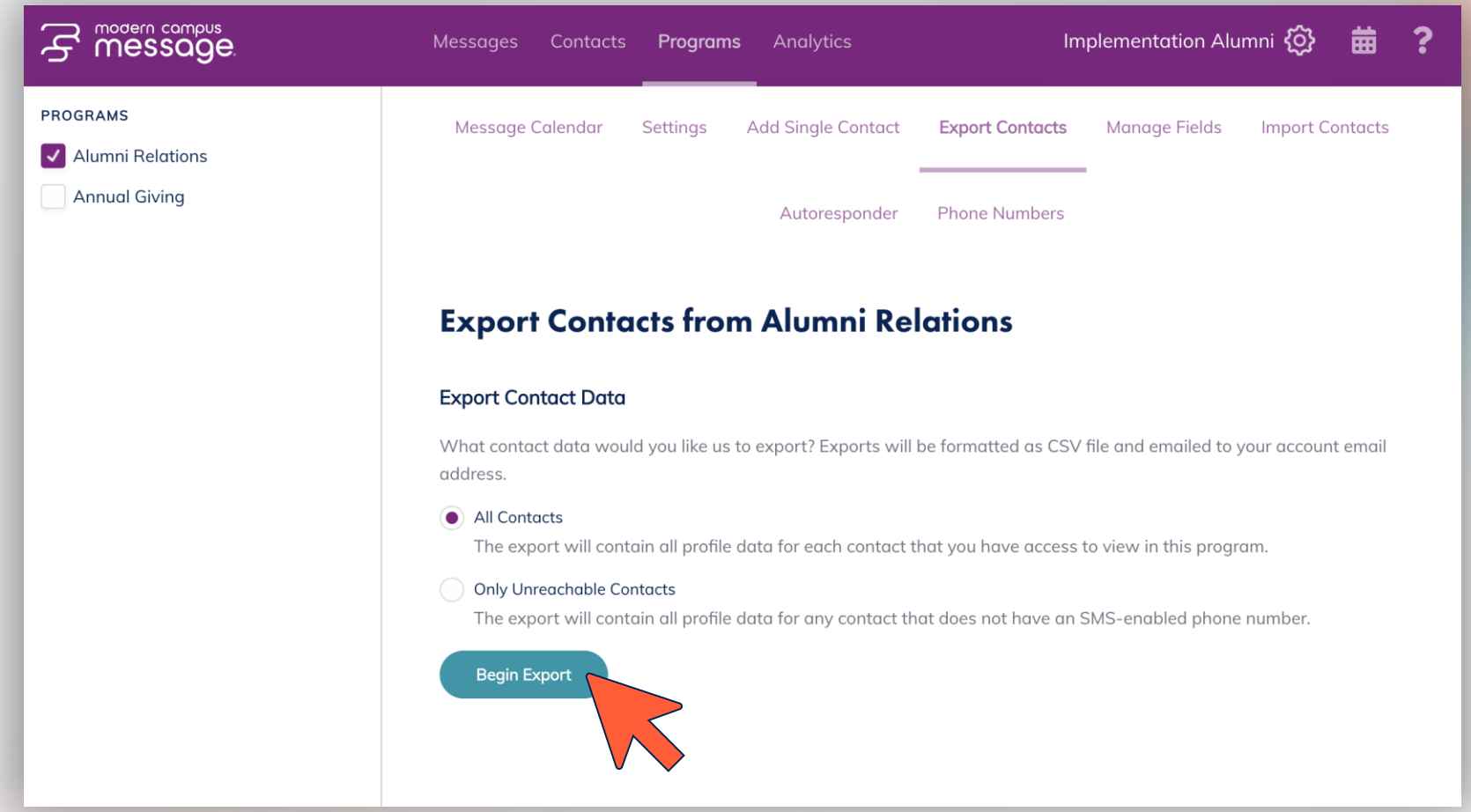
Add a Single Contact

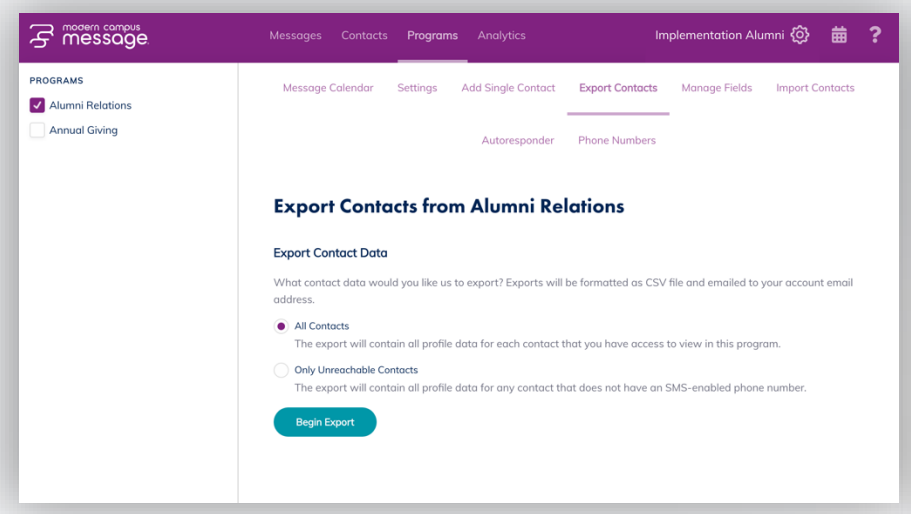
- Required fields
  - Name
  - Phone Number
  - Group(s)



Export Contacts

- Exports a .csv file
- Sent to your email
- Limited to every 2 hours
- Could take a few minutes!





[Modern Campus Message] Your requested export is ready!

SV

Signal Vine <support@signalvine.com>

Today at 10:27 AM

To: kseale+2@moderncampus.com

To protect your privacy, some external images in this... Download external images Go to Settings

You don't often get email from support@signalvine.com. Learn why this is important

Kelsey,

The Modern Campus Message contact export for Alumni Relations you've requested is now ready.

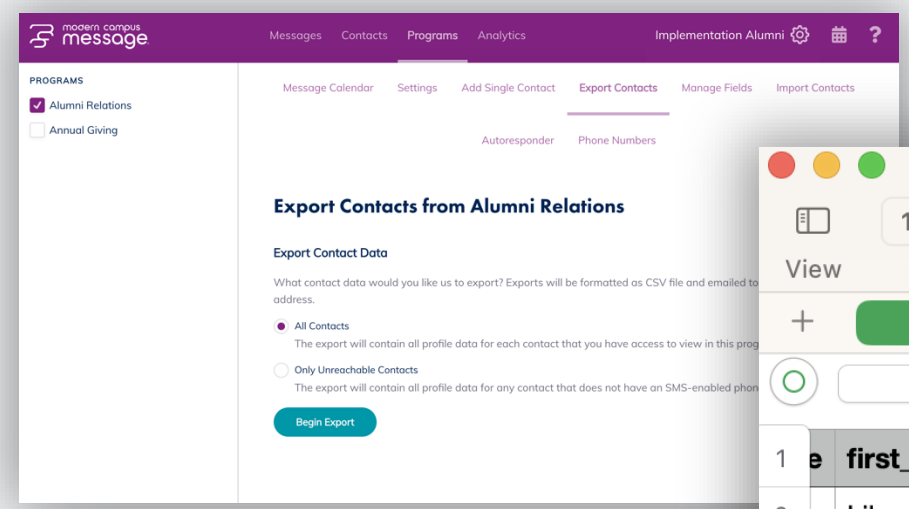
[Download the Report]

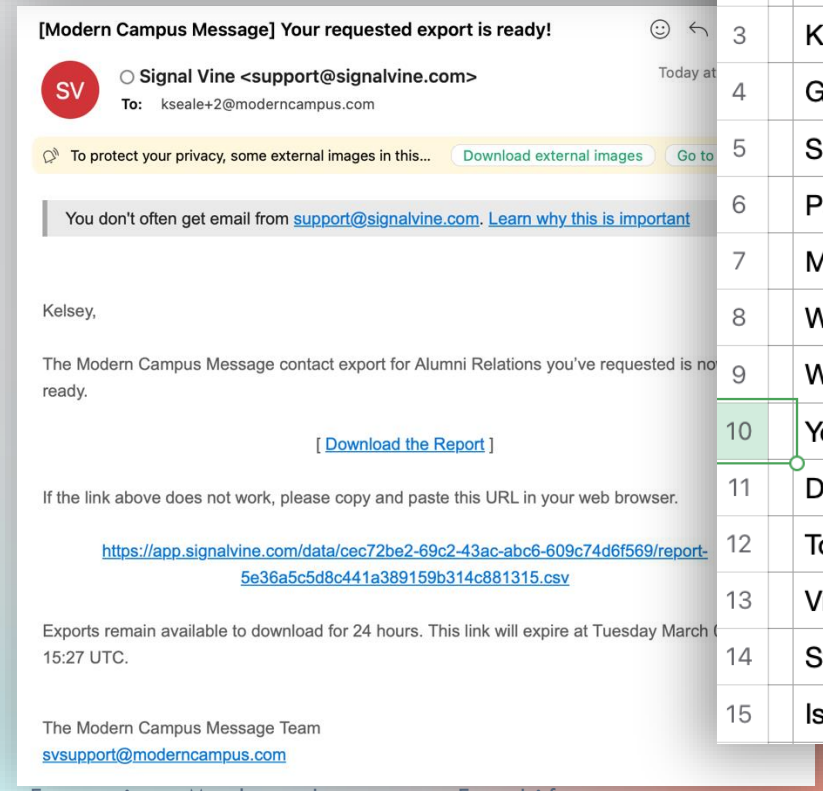
If the link above does not work, please copy and paste this URL in your web browser.

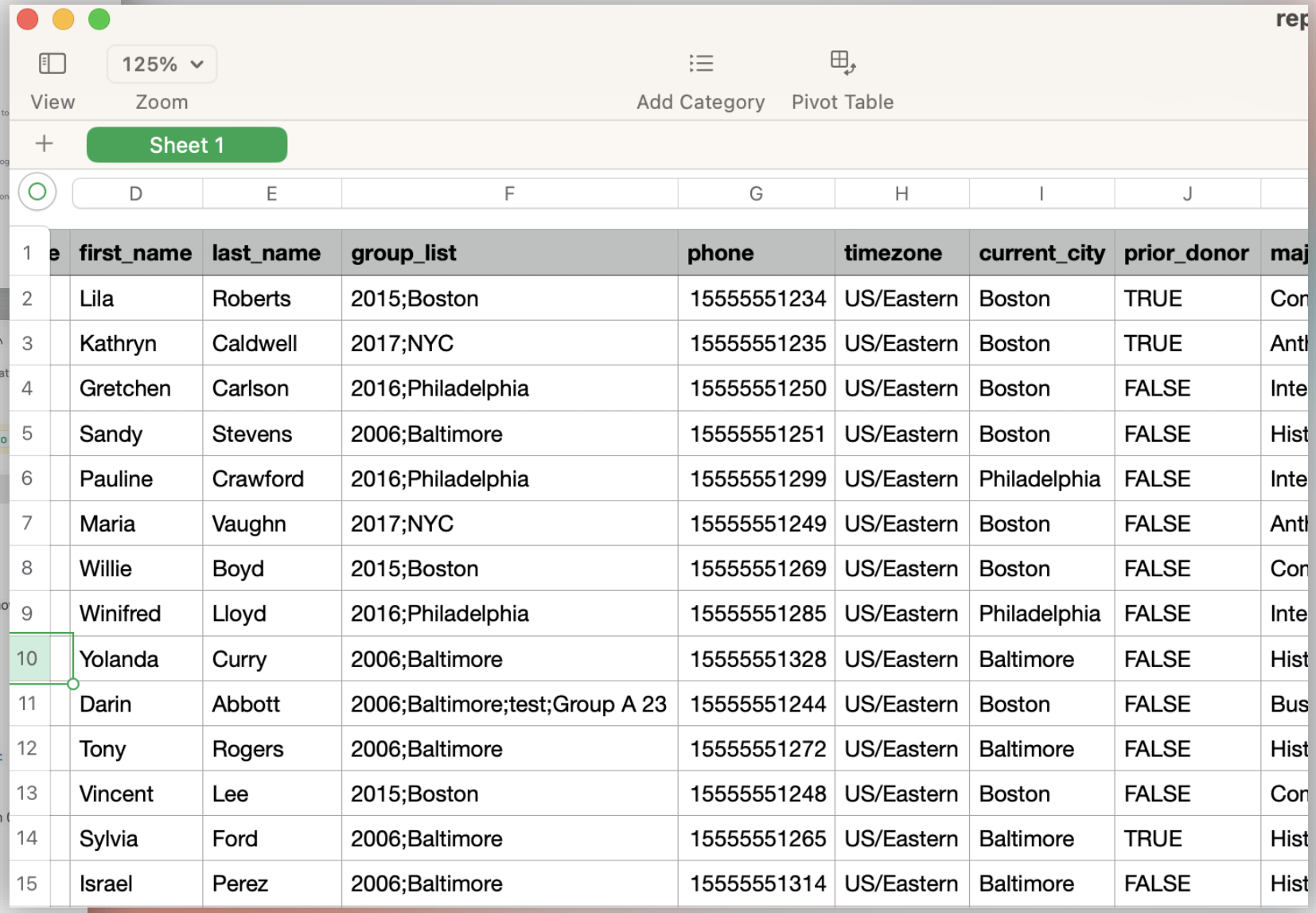
https://app.signalvine.com/data/cec72be2-69c2-43ac-abc6-609c74d6f569/report-5e36a5c5d8c441a389159b314c881315.csv

Exports remain available to download for 24 hours. This link will expire at Tuesday March 05 at 15:27 UTC.

The Modern Campus Message Team
svsupport@moderncampus.com



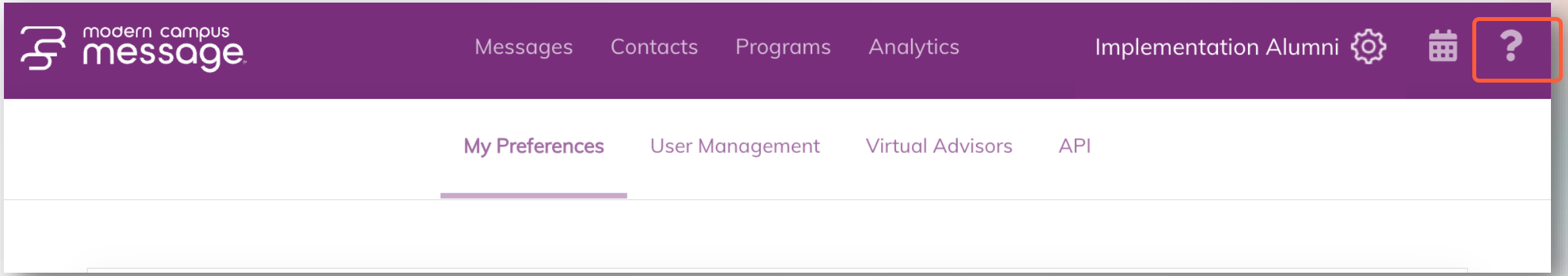




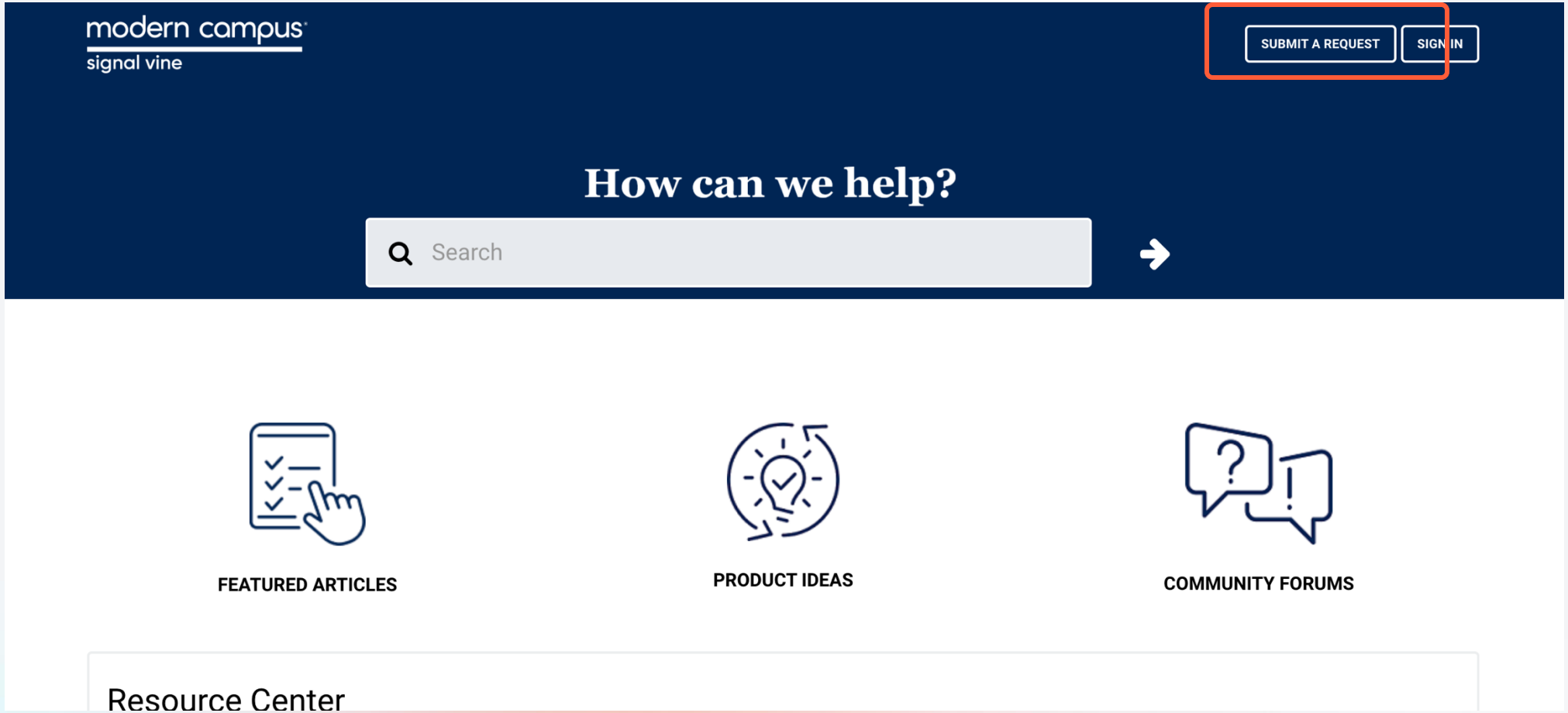
	D	E	F	G	H	I	J
1	first_name	last_name	group_list	phone	timezone	current_city	prior_donor
2	Lila	Roberts	2015;Boston	15555551234	US/Eastern	Boston	TRUE
3	Kathryn	Caldwell	2017;NYC	15555551235	US/Eastern	Boston	TRUE
4	Gretchen	Carlson	2016;Philadelphia	15555551250	US/Eastern	Boston	FALSE
5	Sandy	Stevens	2006;Baltimore	15555551251	US/Eastern	Boston	FALSE
6	Pauline	Crawford	2016;Philadelphia	15555551299	US/Eastern	Philadelphia	FALSE
7	Maria	Vaughn	2017;NYC	15555551249	US/Eastern	Boston	FALSE
8	Willie	Boyd	2015;Boston	15555551269	US/Eastern	Boston	FALSE
9	Winifred	Lloyd	2016;Philadelphia	15555551285	US/Eastern	Philadelphia	FALSE
10	Yolanda	Curry	2006;Baltimore	15555551328	US/Eastern	Baltimore	FALSE
11	Darin	Abbott	2006;Baltimore;test;Group A 23	15555551244	US/Eastern	Boston	FALSE
12	Tony	Rogers	2006;Baltimore	15555551272	US/Eastern	Baltimore	FALSE
13	Vincent	Lee	2015;Boston	15555551248	US/Eastern	Boston	FALSE
14	Sylvia	Ford	2006;Baltimore	15555551265	US/Eastern	Baltimore	TRUE
15	Israel	Perez	2006;Baltimore	15555551314	US/Eastern	Baltimore	FALSE

Knowledge Base and Community Forum

Knowledge Base



Submit a Help Ticket!



What will you put into practice after this webinar?

Answer in the poll!

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!