



# modern<sup>®</sup> campus

Engaging Modern Learners  
For Life

# Group Management

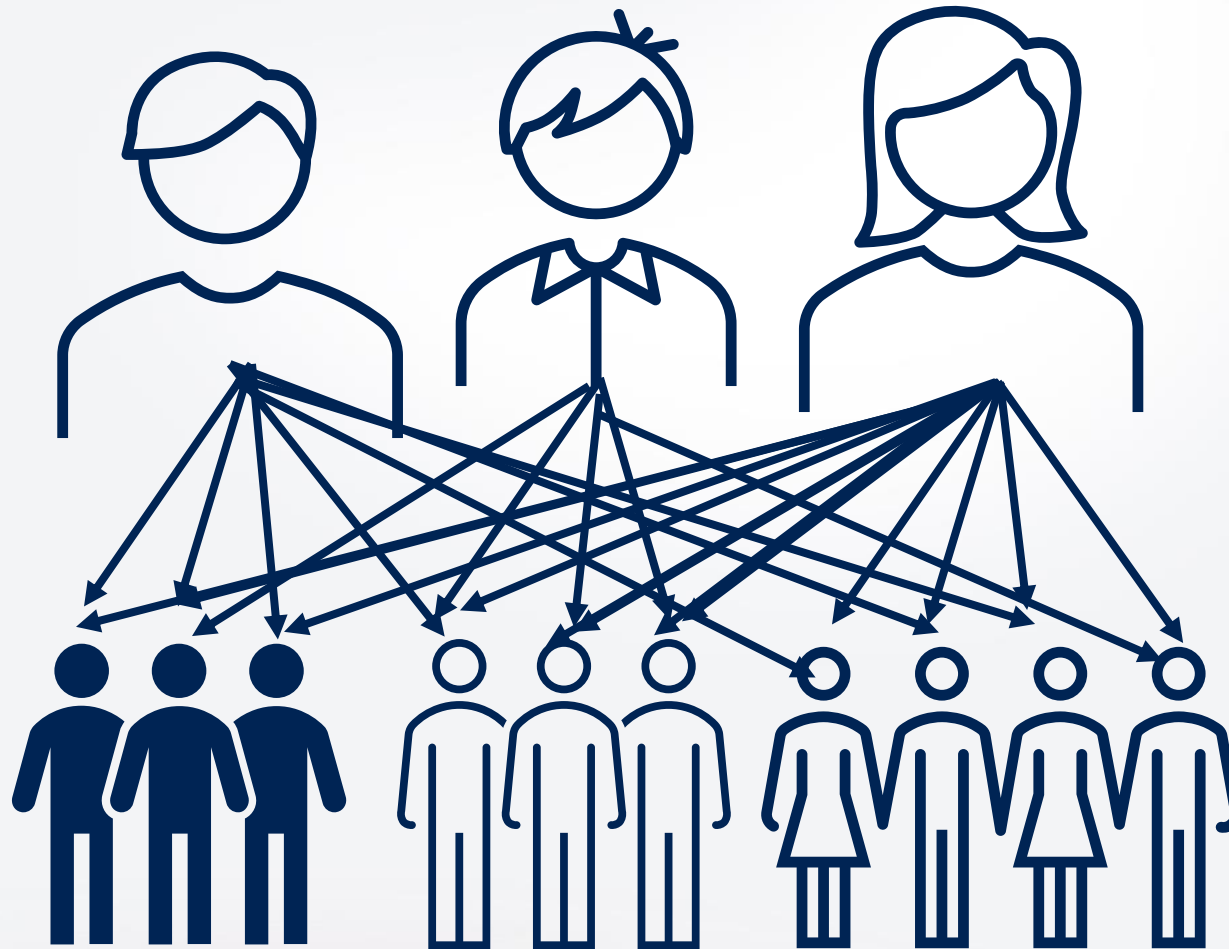
Create, delete, and manage groups for smoother Message management.

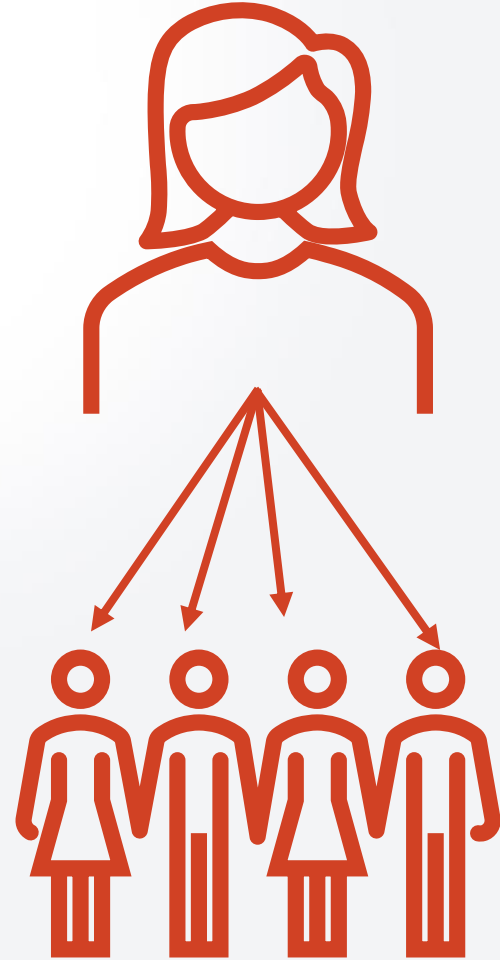
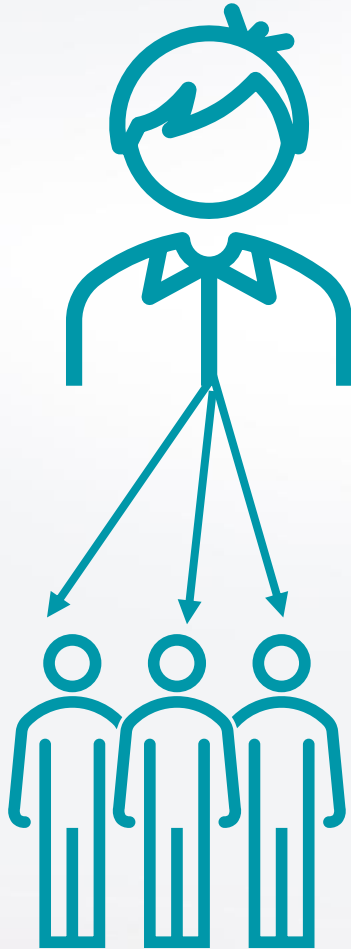
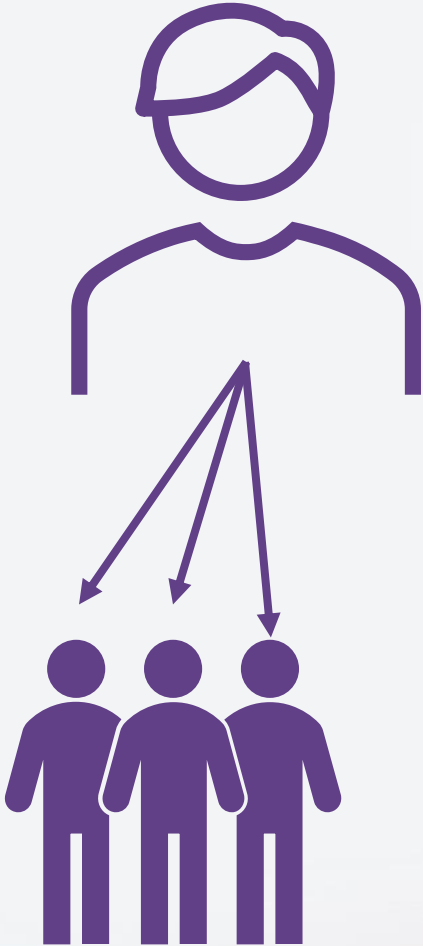
# Agenda

1. Intro to groups
2. Create and Delete Groups
3. Data File
4. Trouble Shooting
5. Counselor Management
6. Q&A
7. Close



# Using Groups in Message







PROGRAMS

Program →  Alumni Relations

[ALL](#) | [NONE](#)

Groups

- 2006
- 2008
- 2010
- 2011
- 2015
- 2016
- 2017
- Baltimore
- Boston
- DC

← Each group can have their own assigned counselor. Counselors can be assigned to more than one group.

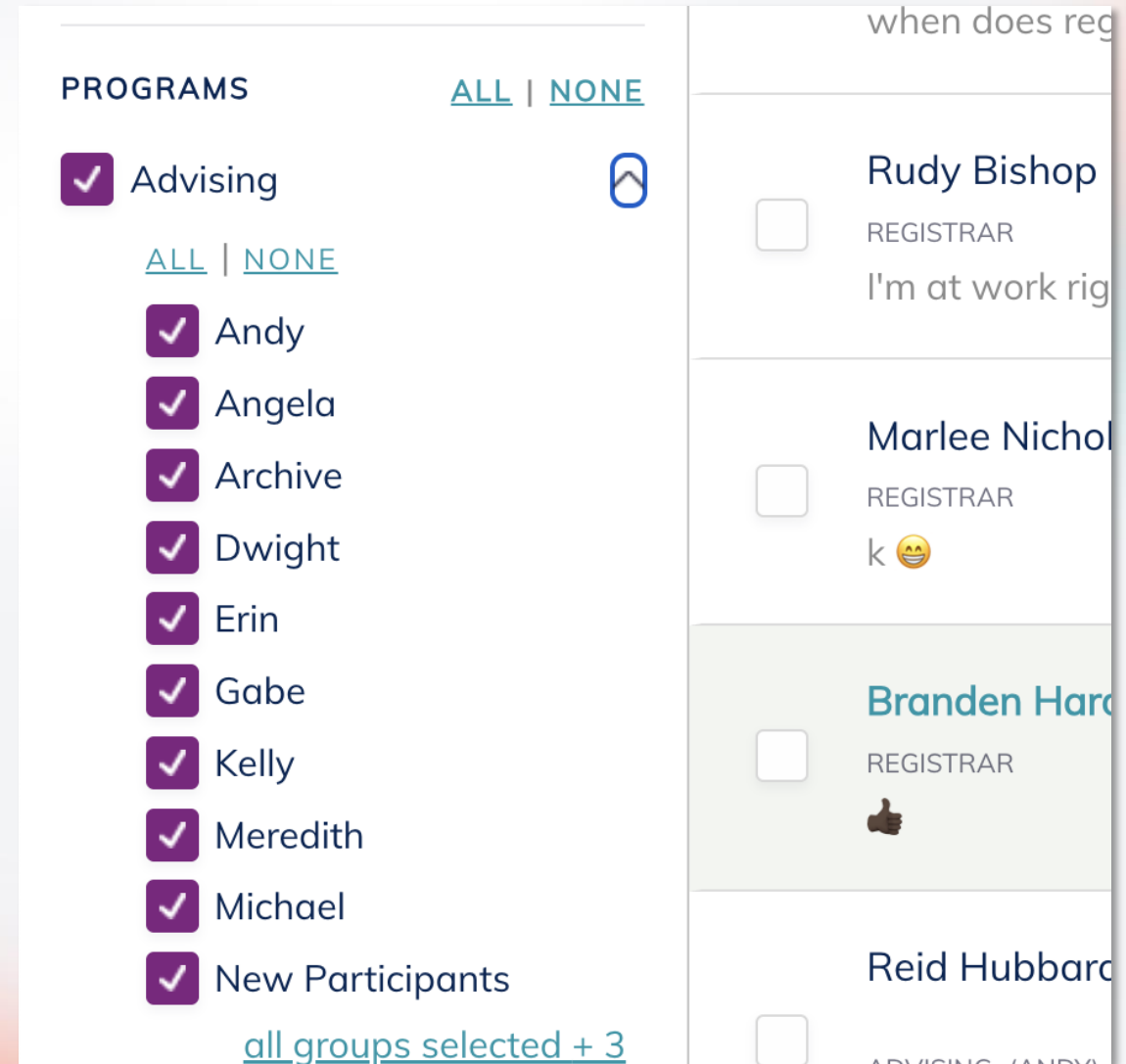
Annual Giving



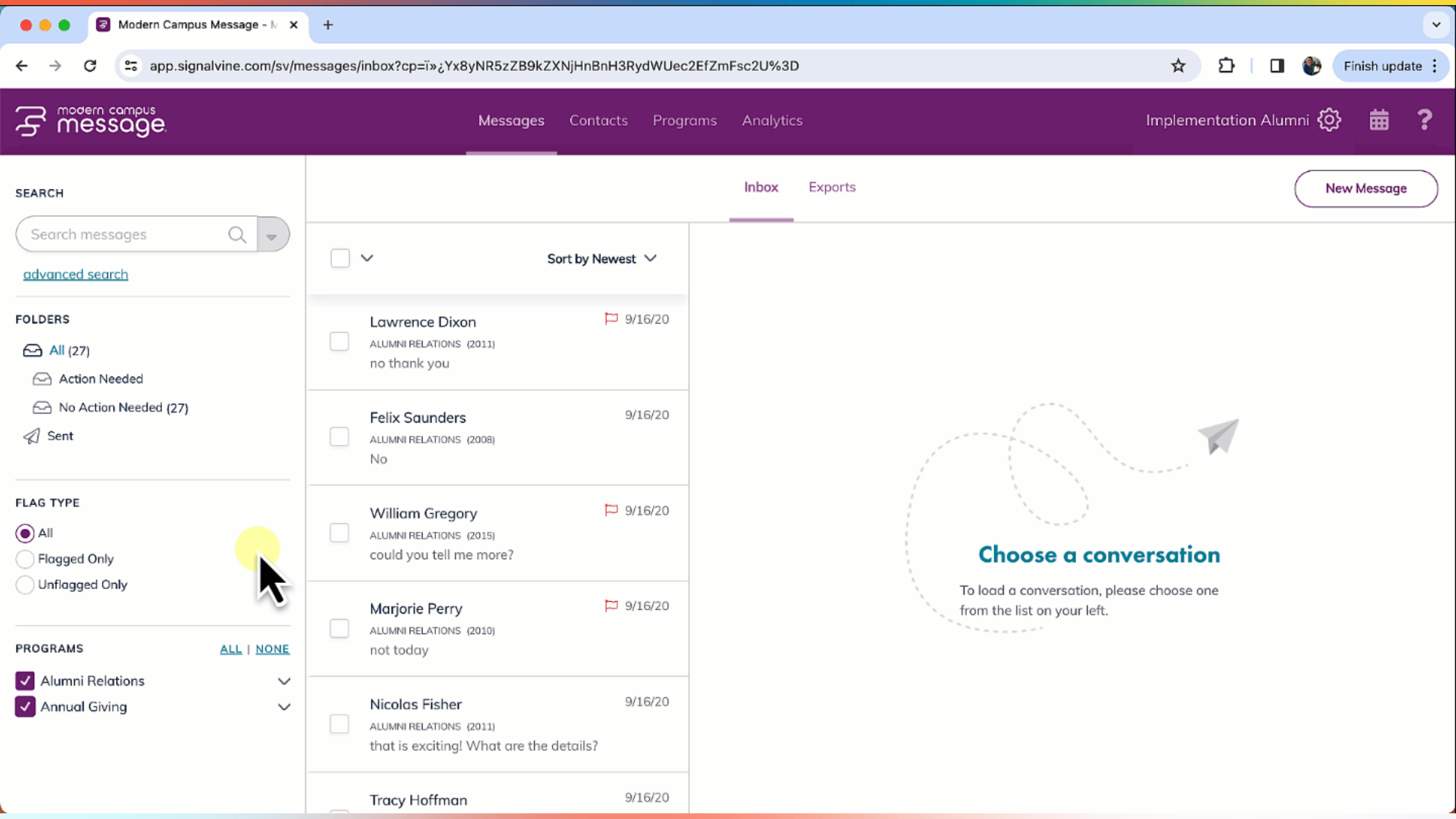
# Groups

- Separate contacts into segments
- Use groups to...
  - Assign counselor case loads
  - Filter down your inbox
  - Send quick messages

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New Message

SEARCH

Search messages

[advanced search](#)

FOLDERS

- All (27)
- Action Needed
- No Action Needed (27)
- Sent

FLAG TYPE

- All
- Flagged Only
- Unflagged Only

PROGRAMS

- [ALL](#) | [NONE](#)
- Alumni Relations
  - Annual Giving

Inbox Exports

Sort by Newest

**Lawrence Dixon** 9/16/20  
ALUMNI RELATIONS (2011)  
no thank you

**Felix Saunders** 9/16/20  
ALUMNI RELATIONS (2008)  
No

**William Gregory** 9/16/20  
ALUMNI RELATIONS (2015)  
could you tell me more?

**Marjorie Perry** 9/16/20  
ALUMNI RELATIONS (2010)  
not today

**Nicolas Fisher** 9/16/20  
ALUMNI RELATIONS (2011)  
that is exciting! What are the details?

**Tracy Hoffman** 9/16/20

### Choose a conversation

To load a conversation, please choose one from the list on your left.

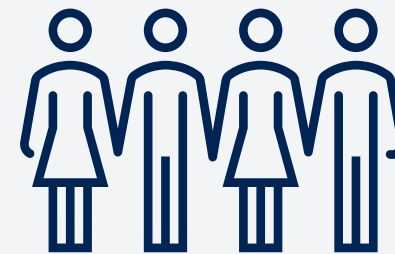
# Benefits of Groups

- Restrict data: make sure that users don't have access to any unnecessary data
- Ensure users aren't texting the wrong contacts
- Keep caseloads focused
- Send quick messages to a regularly used segment of contacts



PII Protection

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Enrolled Group



Not Enrolled  
Group

# Create & Delete Groups

# It's all about the group\_list!

E	F	G	H	I	
<b>phone</b>	<b>timezone</b>	<b>group_list</b>	<b>major</b>	<b>gpa</b>	<b>ac</b>
1.5556E+10	US/Eastern	New Participants			
1.5551E+10	US/Eastern	Gabe	Psychology	3	Er
1.5551E+10	US/Eastern	Meredith	Engineering	3	Ga
1.5551E+10	US/Eastern	Angela	Communicat	3	M
1.5551E+10	US/Eastern	Michael	Economics	2.67	M
1.5551E+10	US/Eastern	Michael	Communicat	2.75	M
1.5551E+10	US/Eastern	Meredith	Economics	2.41	Ga
1.5551E+10	US/Eastern	Meredith	Nursing	2.99	Ga
1.5551E+10	US/E	M	E	2.50	C

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E	F	G	H	I	
phone	timezone	group_list	major	gpa	ac
1.5556E+10	US/Eastern	New Participants			
1.5551E+10	US/Eastern	Gabe	Psychology		3 Er
1.5551E+10	US/Eastern	Meredith	Engineering		3 G
1.5551E+10	US/Eastern	Angela	Communicat		3 M
1.5551E+10	US/Eastern	Michael	Economics	2.67	M
1.5551E+10	US/Eastern	Michael	Communicat	2.75	M
1.5551E+10	US/Eastern	Meredith	Economics	2.41	G
1.5551E+10	US/Eastern	Meredith	Nursing	2.99	G

Each new name creates a corresponding group!


# Create a Group

1. Update the group\_list column on your data file
2. Each new entry will create a separate group list
3. The more contacts with that entry, the larger the group

F	G	
zone	group_list	majo
eastern	New Participants	
eastern	Gabe	Pysc
eastern	Meredith	Engin
eastern	Angela	Com
eastern	Michael	Econ
eastern	Michael	Com
eastern	Meredith	Econ
eastern	Meredith	Nursi

F	G	
zone	group_list	majo
Eastern	New Participants	
Eastern	Gabe	Pysc
Eastern	Meredith	Engir
Eastern	Angela	Com
Eastern	Michael	Econ
Eastern	Michael	Com
Eastern	Meredith	Econ
Eastern	Meredith	Nurs

PROGRAMS [ALL](#) | [NONE](#)

Advising 

[ALL](#) | [NONE](#)

- Andy
- Angela
- Archive
- Dwight
- Erin
- Gabe
- Kelly
- Meredith
- Michael
- New Participants

[all groups selected + 3](#)

when does reg

Rudy Bishop  
REGISTRAR  
I'm at work rig

Marlee Nichol  
REGISTRAR  
k 😊

Branden Har  
REGISTRAR  
👍

Reid Hubbar



To add to more than one group, use a semi-colon between group names.

E	F	G
<b>timezone</b>	<b>group_list</b>	<b>fafsa_submit</b>
) US/Eastern	2022;Alexis	TRUE
) US/Eastern	2022;Alexis	TRUE
) US/Eastern	2022;Alexis	TRUE
) US/Eastern	2021;John	FALSE
) US/Eastern	2022;Archived	FALSE
) US/Eastern	2022;Patrick	FALSE

Financial Aid ^
   
[ALL](#) | [NONE](#)

- 2020
- 2021
- 2022
- 2023
- Alexis
- Alison

# The Data File

# What is a data file?

- Used to update contacts or add new contacts
- Always a .csv file
- Contains contact information used in Message
- Can be manually updated by program and account admin

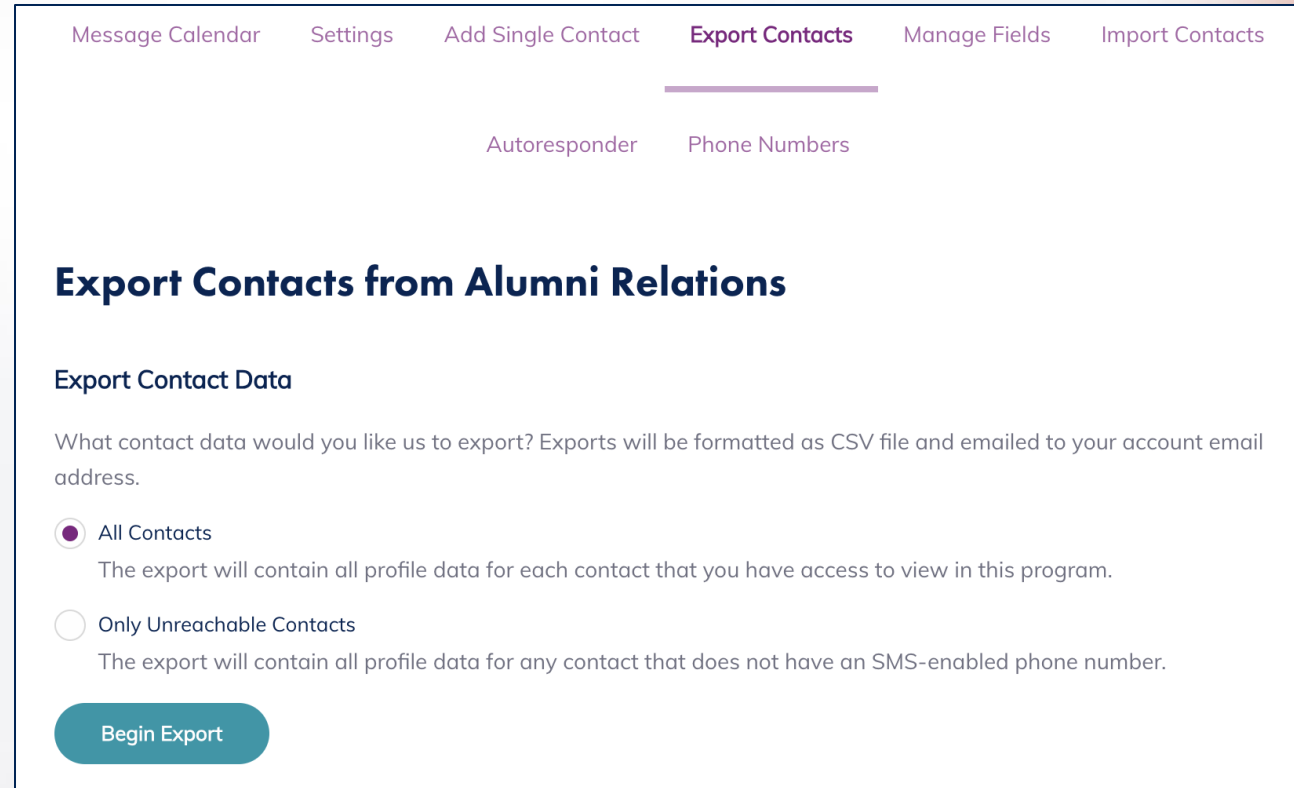
	A	B	C	D	E	
	<b>customer_id</b>	<b>major</b>	<b>donation_amo</b>	<b>staff_name</b>	<b>prior_donor</b>	<b>sig</b>
	10000	Communicatio	\$500.00	Joe	FALSE	225
	10001	Anthroplogy	\$25.00	Joe	YES	225
	10002	International R	\$80.00	Joe	NO	225
	10003	History		Joe	TRUE	225
	10004	International R	90	Kris		225
	10005	Anthroplogy	N/A	Joe		225
	10006	Communicatio	N/A	Joe	TRUE	225
	10007	International R	N/A	Kris	TRUE	225
	10008	History	100	Laney		225
	10009	Business	N/A	Joe	FALSE	225

# Where is my data file?

- Do you have a master file?
  - Communicate with other users in your institution
  - Who is supposed to update / add?
- Export your data to create an data file
  - Program tab
  - Export contacts

**\*there are fields in the export file that will fail your import, delete them!**

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# What is a data file?

- The best way to create and delete groups!

	E	F	G
	<b>timezone</b>	<b>group_list</b>	<b>fafsa_submit</b>
)	US/Eastern	2022;Alexis	TRUE
)	US/Eastern	2022;Alexis	TRUE
)	US/Eastern	2022;Alexis	TRUE
)	US/Eastern	2021;John	FALSE
)	US/Eastern	2022;Archived	FALSE
)	US/Eastern	2022;Patrick	FALSE

Financial Aid ^

[ALL](#) | [NONE](#)

- 2020
- 2021
- 2022
- 2023
- Alexis
- Alison

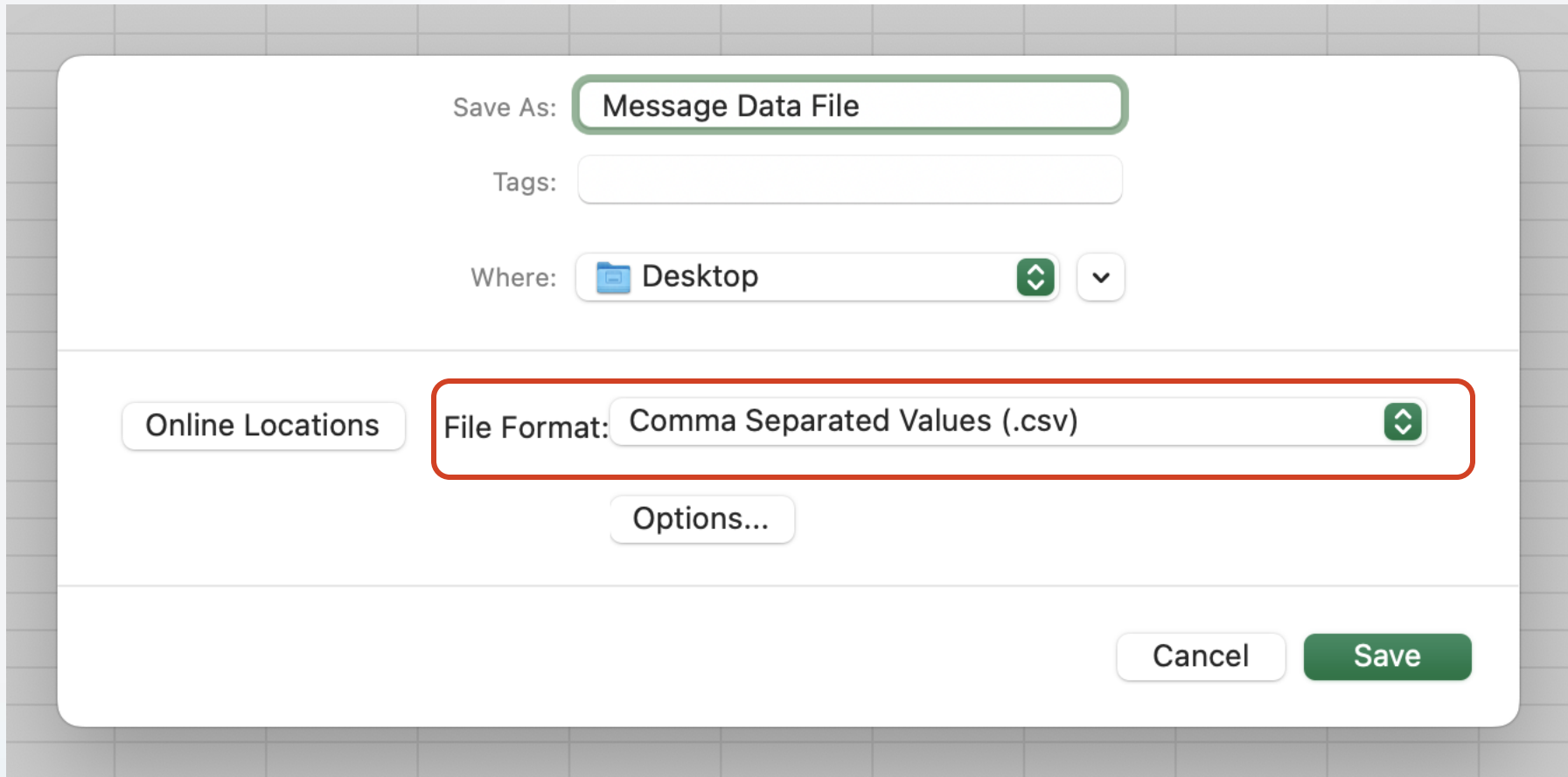
# Data File

- Column header is “group\_list”
- Group names are case and space sensitive!
  - Alexis vs. alexis

	E	F	G
	<b>timezone</b>	<b>group_list</b>	<b>fafsa_submit</b>
)	US/Eastern	2022;Alexis	TRUE
)	US/Eastern	2022;Alexis	TRUE
)	US/Eastern	2022;Alexis	TRUE
)	US/Eastern	2021;John	FALSE
)	US/Eastern	2022;Archived	FALSE
)	US/Eastern	2022;Patrick	FALSE

# .CSV file

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# In Platform

- Export Contacts
- Retrieve File
- Edit group\_list
  - Create a “duplicate group”
- Upload data file
- **\*Show how adding a group in an individual contact will create a new group\***

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# How to Structure Groups

# How do you want to use groups?

- **Counselors**
  - Adam
  - Parvati
  - Sandra
- **Class**
  - 2023
  - 2024
- **High School**
  - Oak Mountain
  - Vestavia Hills
- **Region**
  - Northeast
  - Southeast
- **Status**
  - Enrolled
  - No Enrolled
- **Institution**
  - Auburn
  - UAB

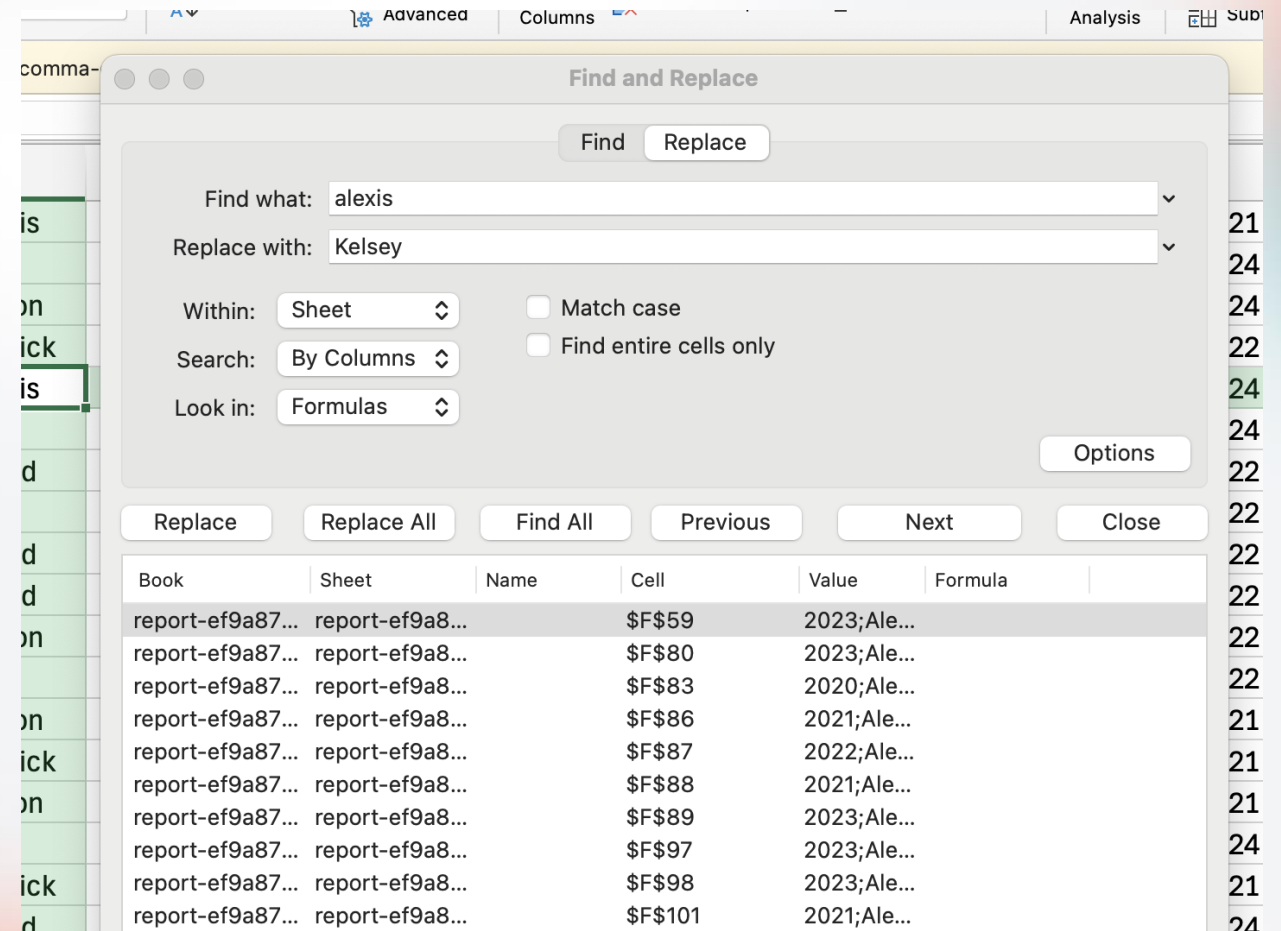
# Groups vs. Advanced Search

- Depends on your structure!
- Some orgs have 100s of group\_lists
- Some orgs prefer to have less group\_lists
  - Enrolled
  - Not enrolled
  - Archive
  - Then use advance search on top that
- Groups are great when you have a lot of users and want to use the counselor case-load system
- Broad group pair well with advanced search

# Troubleshooting

# “I need to rename my groups!”

- Download your data file
  - (Program Tab → Export Contacts → Begin Export)
- Highlight the “group\_list” column
- Find and Replace
  - Check through data to be sure you have the Group you want





# “I have a duplicate group!”

- You might see two of the “same” group show up in your inbox
- Groups are CASE sensitive and space sensitive
  - Download your data file
  - Filter your group\_list
  - Locate your error
- Check for...
  - Misspellings
  - Extra spaces
  - Upper or lower case discrepancies

# “I can’t get a group to disappear!”

- **In App Check**

- In your inbox, filter down to the unwanted group
- Edit contacts on your data file to the exact group name
- Search those contacts in your data file to edit from the file

- **Data File Check**

- Download your data file
- Search “group\_list” for the unwanted group
- Determine the discrepancy and replace or delete as need

# “Where is my contact?”

- You will not be able to text a contact with a BLANK group\_list
- Don't need to update group\_list? Delete it from your data file!

	E	F	G
	<b>timezone</b>	<b>group_list</b>	<b>fafsa_submit p</b>
10	US/Eastern		TRUE
10	US/Eastern		TRUE
10	US/Eastern		TRUE
10	US/Eastern		FALSE
10	US/Eastern		FALSE
10	US/Eastern	2022;Patrick	FALSE
10	US/Eastern	2021;Patrick	TRUE
10	US/Eastern	2023;John;DNC	FALSE
10	US/Eastern	2022;John	TRUE

“My scheduled messages aren’t going to the right people.”

- Scheduling with **Smart Send** will send to the group members at the **time of send**
- If you have automatic data imports, groups could be changed between the time of schedule and the time of send
- Data uploads always override current data

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**New Message** ✕

Send from:  
Advising ▼

Send to: 27 contacts [clear criteria](#) Query results as of Aug 6, 2025, 11:21:09 AM

Program is Advising

**Group(s) Erin, Dwight, Angela**

Message: Delivery date/time: 08/27/25 @ 11:26 AM

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

**Match:  Smart Send  Current Matches**

# Counselors + Groups

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

# Locate User Management

The screenshot displays the Modern Campus Message web 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 a left sidebar and a central inbox. The sidebar includes a search bar, a link to 'advanced search', and a 'FOLDERS' section with options like 'All (111)', 'Action Needed (10)', 'No Action Needed (101)', and 'Sent'. The central inbox shows a list of messages with columns for checkboxes, names, roles, and dates. A dropdown menu is open over the 'Implementation HE' account, listing options: 'Settings' (highlighted with an orange mouse cursor), 'Terms of Service', 'Privacy Policy', and 'Logout'. A paper airplane icon is visible at the bottom right of the interface.

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# Invite a new user

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The screenshot shows the 'User Management' interface in the Modern Campus Message system. The 'User Management' tab is selected and highlighted with a red mouse cursor. The interface includes a search bar and a table of active users.

**Manage Users** Invite New User ▾

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	









## 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 administrator. [?](#)

Please select a CSV file to import (15MB)

	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			

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# 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

# 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!

# Survey Time!

2 minutes! Thank you so much!

\* 3. Overall, were you satisfied with your training?

Yes

No

\* 4. On the following scale, how **helpful** and **informative** was the training webinar?

1 - Not Helpful

2

3 - Neutral

4

5 - Helpful

Additional comments to reflect your score.

5. Additional feedback? We value your feedback and use it to improve the quality of our training webinars over time.

6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!



# Thank You

See you next month!