



modern® campus

Engaging Modern Learners
For Life



Group Management

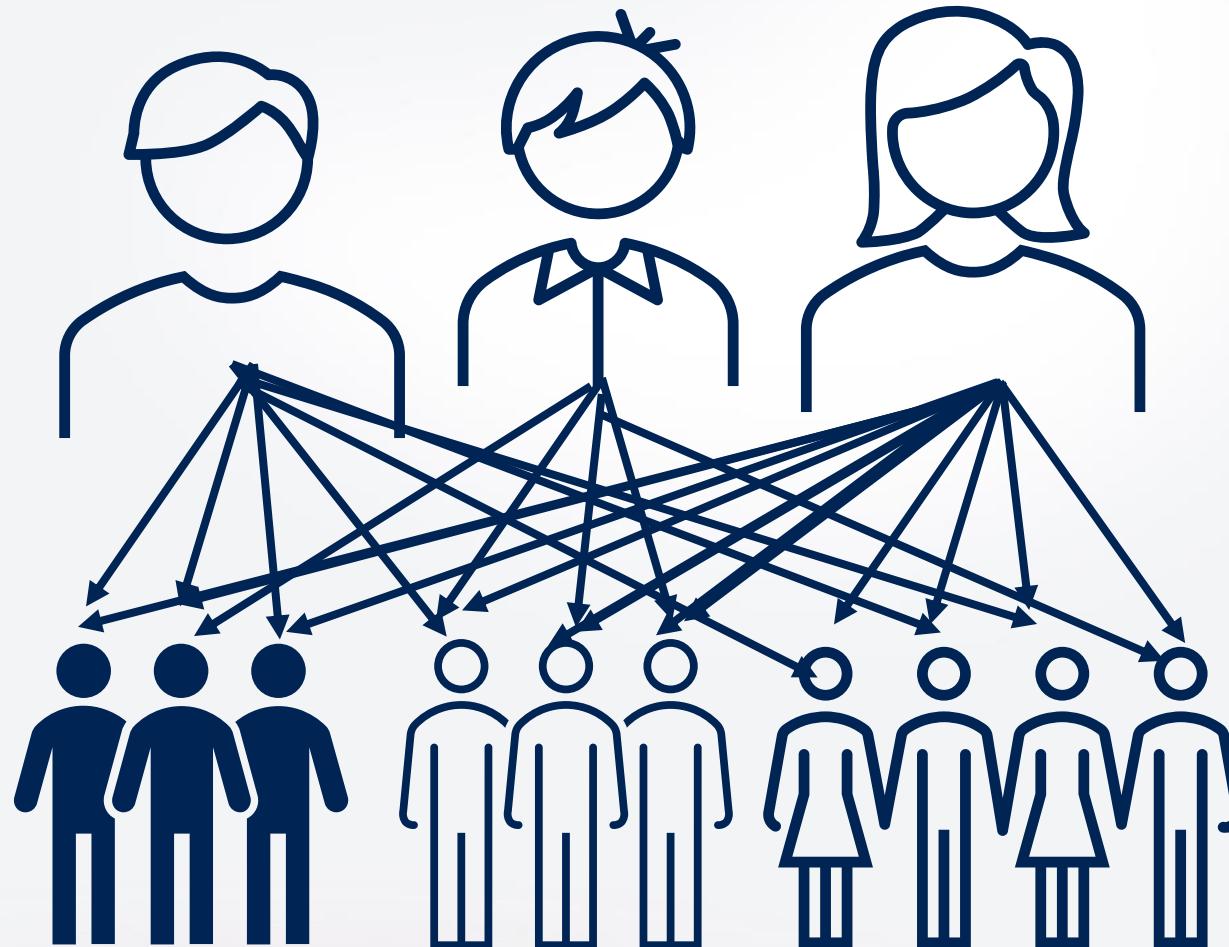
Create, delete, and manage groups for
smoother Message management.

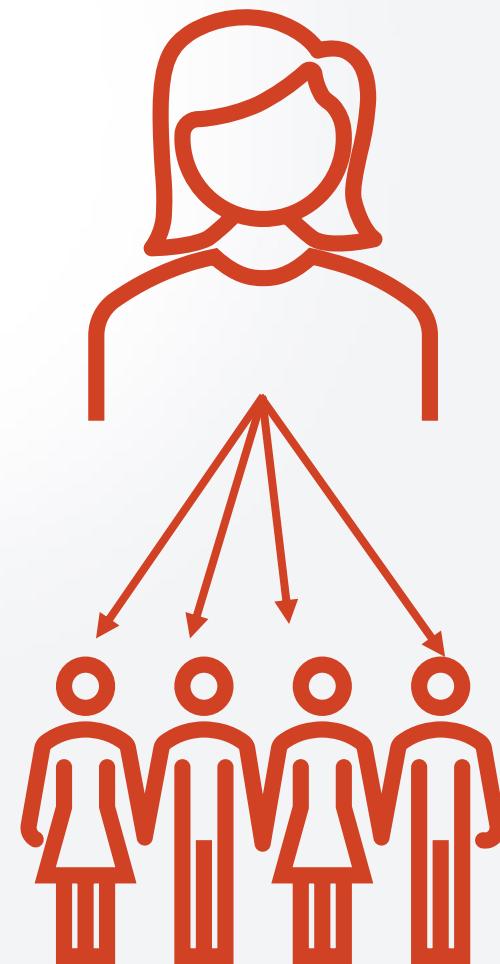
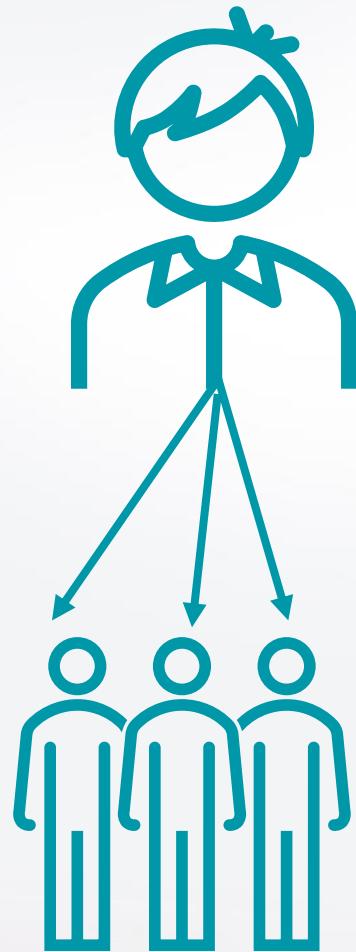
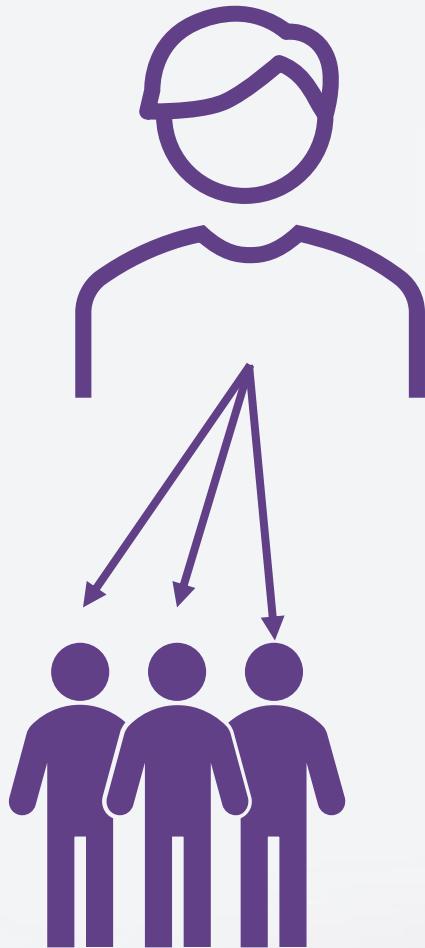
Agenda

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



Annual Giving

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



Groups

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

The screenshot shows a mobile application interface for managing groups and messaging. On the left, a sidebar titled 'PROGRAMS' lists various contacts and groups, each with a checkbox and a small profile picture. The contacts listed are Advising, Andy, Angela, Archive, Dwight, Erin, Gabe, Kelly, Meredith, Michael, and New Participants. Below this list is a button labeled 'all groups selected + 3'. On the right, the main messaging screen displays a list of messages from different users, including Rudy Bishop, Marlee Nichols, Branden Hard, and Reid Hubbard. Each message includes the user's name, title (e.g., REGISTRAR), a short message, and a small emoji or icon.

PROGRAMS	ALL NONE
Advising	<input checked="" type="checkbox"/>
Andy	<input checked="" type="checkbox"/>
Angela	<input checked="" type="checkbox"/>
Archive	<input checked="" type="checkbox"/>
Dwight	<input checked="" type="checkbox"/>
Erin	<input checked="" type="checkbox"/>
Gabe	<input checked="" type="checkbox"/>
Kelly	<input checked="" type="checkbox"/>
Meredith	<input checked="" type="checkbox"/>
Michael	<input checked="" type="checkbox"/>
New Participants	<input checked="" type="checkbox"/>

all groups selected + 3

when does reg
Rudy Bishop REGISTRAR I'm at work rig
Marlee Nichols REGISTRAR k 😊
Branden Hard REGISTRAR 👍
Reid Hubbard ADVISING AND...

Modern Campus Message - M X +

app.signalvine.com/sv/messages/inbox?cp=iiYx8yNR5zZB9kZXNjHnBnH3RydWUec2EfZmFsc2U%3D

★ 📁 📤 📈 📉 Finish update

modern campus message

Messages Contacts Programs Analytics Implementation Alumni 🚂 📅 📖

SEARCH

Search messages

[advanced search](#)

FOLDERS

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

FLAG TYPE

All Flagged Only Unflagged Only

PROGRAMS

Alumni Relations Annual Giving

ALL | NONE

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

Inbox Exports

New Message

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

Benefits of Groups

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- 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



Enrolled Group



Not Enrolled
Group

Create & Delete Groups

It's all about the group_list!

E	F	G	H	I	J	K
phone	timezone	group_list	major	gpa	ac	ad
1.5556E+10	US/Eastern	New Participants				
1.5551E+10	US/Eastern	Gabe	Psychology	3.8	Er	
1.5551E+10	US/Eastern	Meredith	Engineering	3.6	Ga	
1.5551E+10	US/Eastern	Angela	Communication	3.0	M	
1.5551E+10	US/Eastern	Michael	Economics	2.67	M	
1.5551E+10	US/Eastern	Michael	Communication	2.75	M	
1.5551E+10	US/Eastern	Meredith	Economics	2.41	Ga	
1.5551E+10	US/Eastern	Meredith	Nursing	2.99	Ga	

E	F	G	H	I
phone	timezone	group_list	major	gpa
1.5556E+10	US/Eastern	New Participants		
1.5552E+10	US/Eastern	Gabe	Psychology	3.00
1.5551E+10	US/Eastern	Meredith	Engineering	3.00
1.5551E+10	US/Eastern	Angela	Communication	3.00
1.5551E+10	US/Eastern	Michael	Economics	2.67
1.5551E+10	US/Eastern	Michael	Communication	2.75
1.5551E+10	US/Eastern	Meredith	Economics	2.41
1.5551E+10	US/Eastern	Meredith	Nursing	2.99



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

16

F	G	
zone	group_list	major
eastern	New Participants	
eastern	Gabe	Pysci
eastern	Meredith	Engin
eastern	Angela	Com
eastern	Michael	Econ
eastern	Michael	Com
eastern	Meredith	Econ
eastern	Meredith	Nurs
	Max	Engr

F	G	
zone	group_list	major
Eastern	New Participants	
Eastern	Gabe	Psych
Eastern	Meredith	Engin
Eastern	Angela	Comp
Eastern	Michael	Econ
Eastern	Michael	Comp
Eastern	Meredith	Econ
Eastern	Meredith	Nursi

when does rec

PROGRAMS [ALL | NONE](#)

Advising [0](#)

[ALL | NONE](#)

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

[all groups selected + 3](#)

Rudy Bishop
REGISTRAR
I'm at work rig

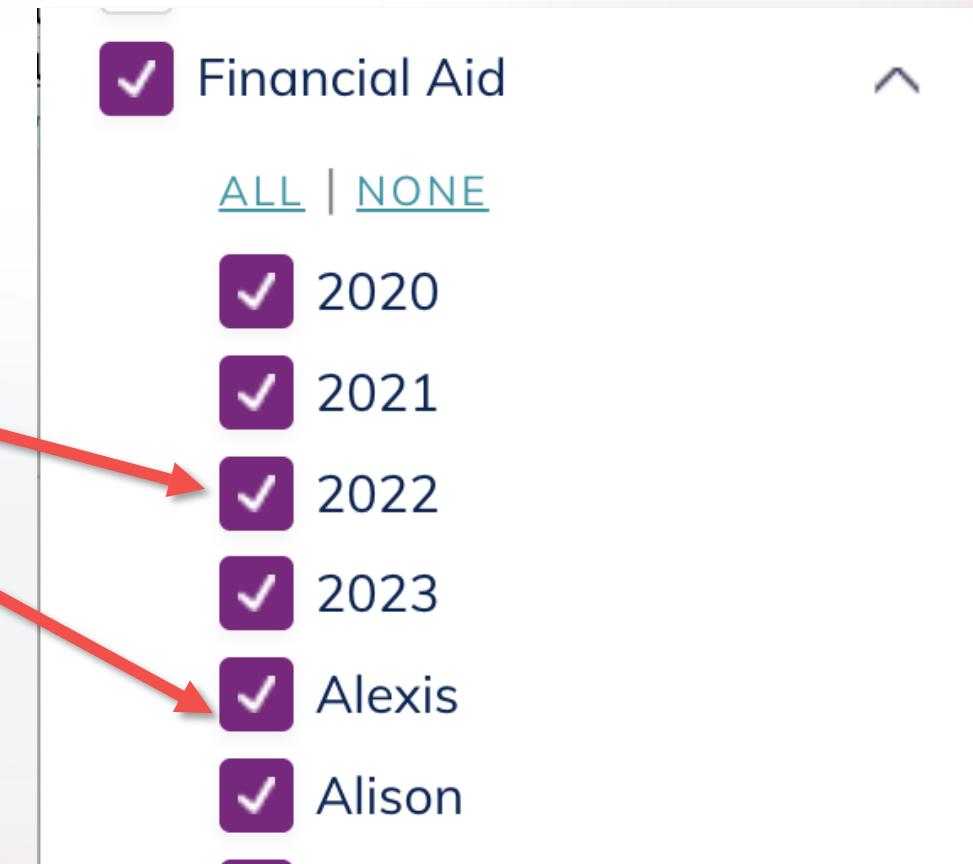
Marlee Nichol
REGISTRAR
k 😊

Branden Hard
REGISTRAR
👍

Reid Hubbard

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

E	F	G
timezone	group_list	fafsa_submit
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



The Data File

What is a data file?

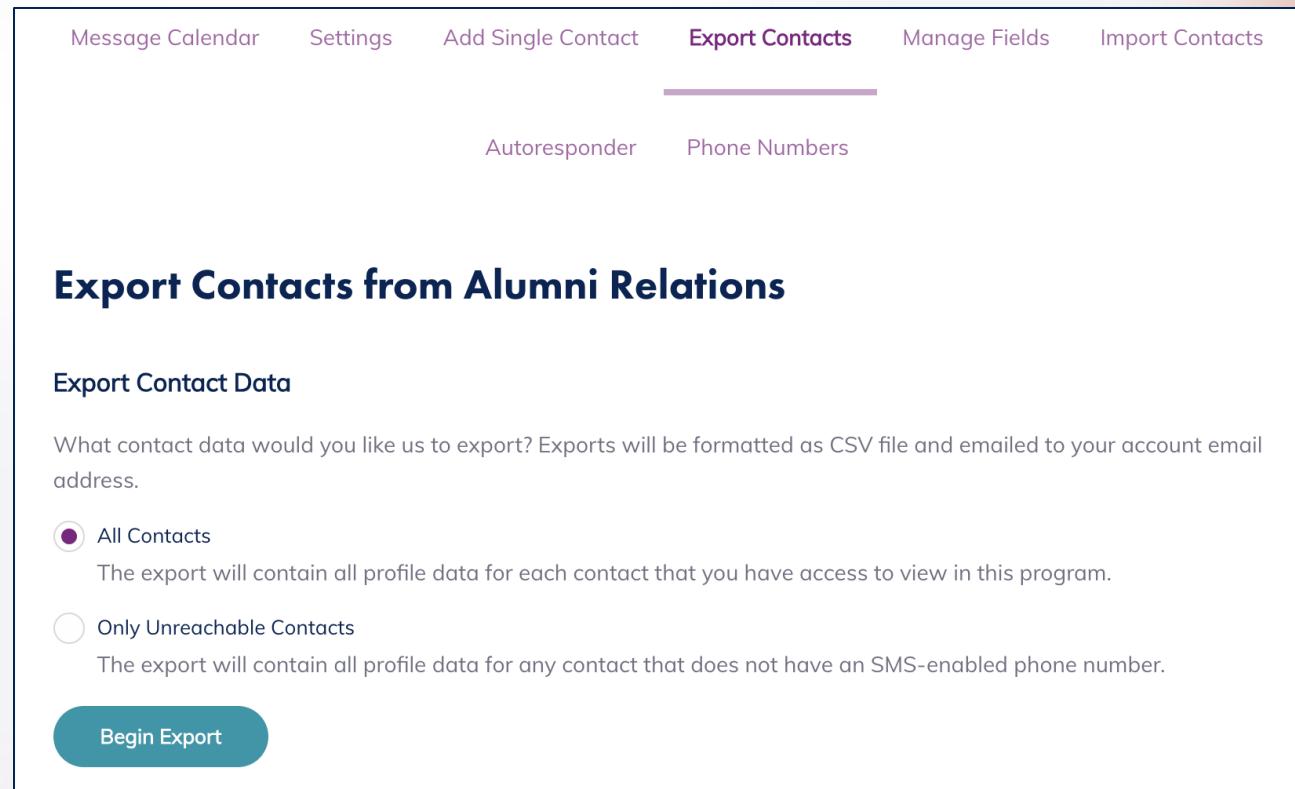
- Used to update contacts or add new contacts
- Always a .csv file
- Contains contact information used in Message
- Can be manually updated by program and account admin

A	B	C	D	E	sig
customer_id	major	donation_amo	staff_name	prior_donor	
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!**



The screenshot shows a user interface for managing contacts. At the top, there are several navigation links: Message Calendar, Settings, Add Single Contact, Export Contacts (which is highlighted with a purple underline), Manage Fields, and Import Contacts. Below these, there are two sub-links: Autoresponder and Phone Numbers. The main content area is titled "Export Contacts from Alumni Relations". Under this title, there is a section titled "Export Contact Data" with the sub-instruction: "What contact data would you like us to export? Exports will be formatted as CSV file and emailed to your account email address." Two radio buttons are provided for selection:

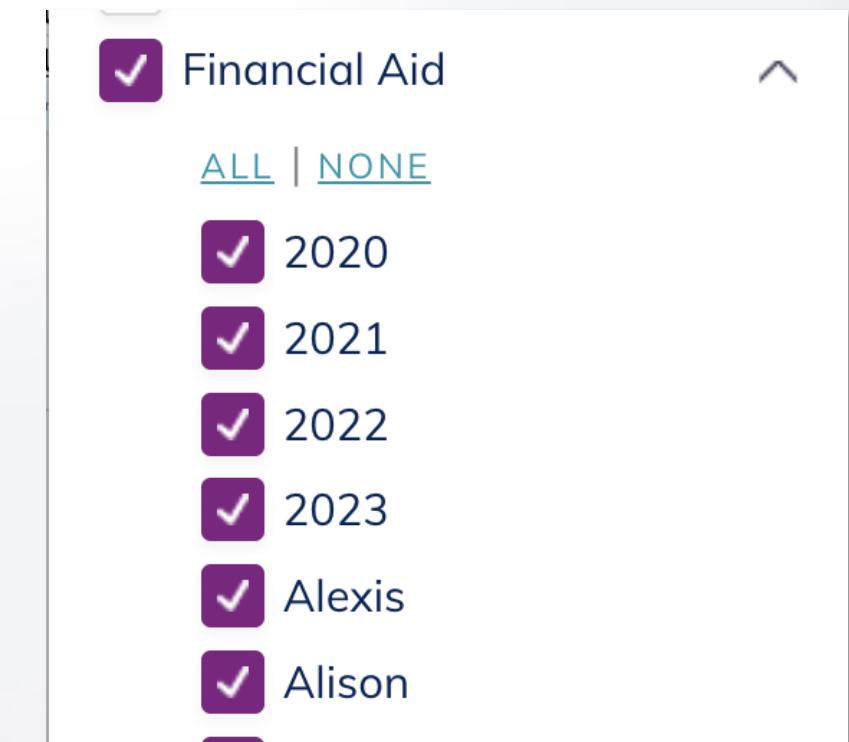
- All Contacts: The export will contain all profile data for each contact that you have access to view in this program.
- Only Unreachable Contacts: The export will contain all profile data for any contact that does not have an SMS-enabled phone number.

What is a data file?

- The best way to create and delete groups!

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E	F	G
timezone	group_list	fafsa_submit
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



Data File

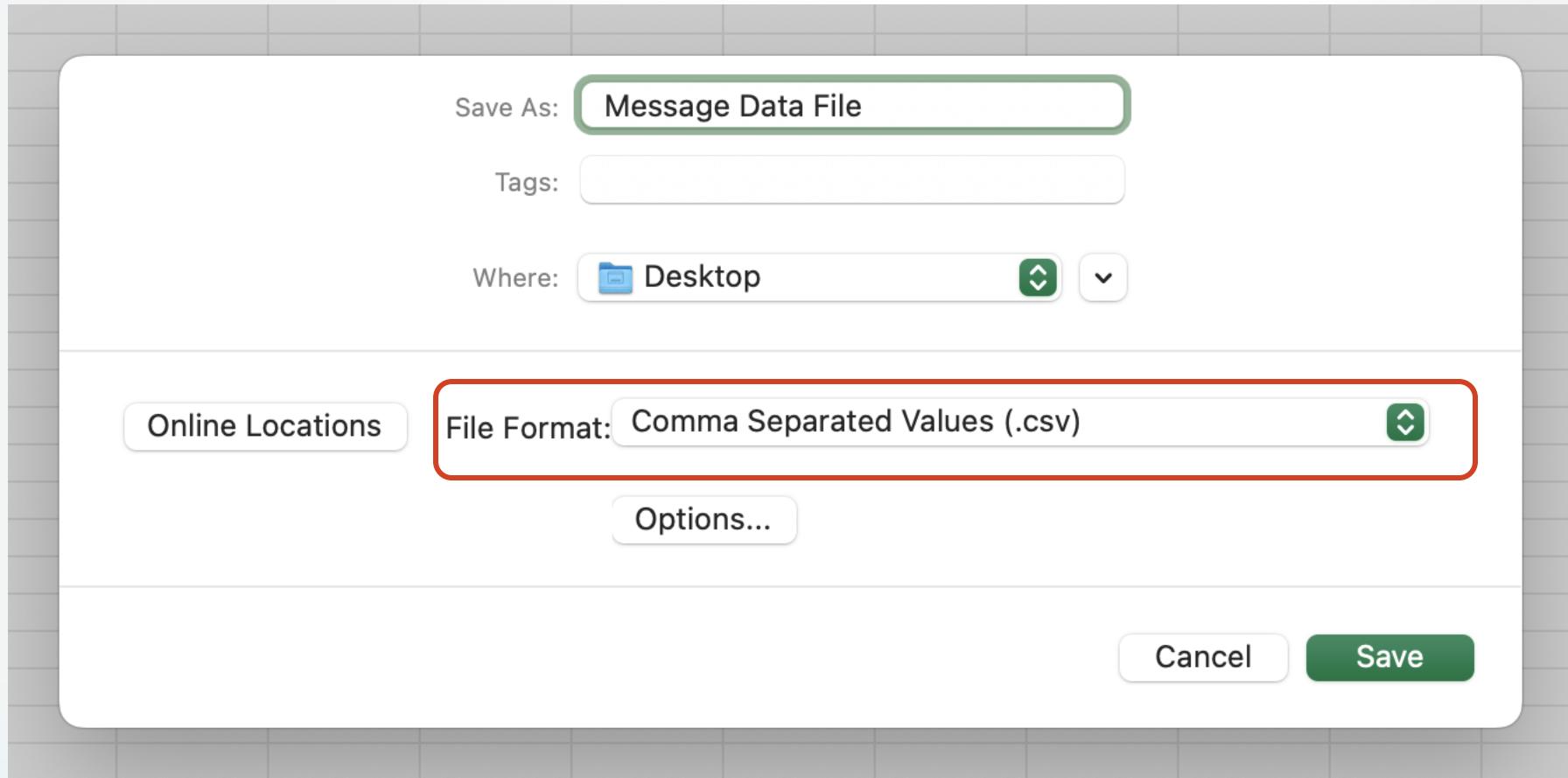
- Column header is “group_list”
- Group names are case and space sensitive!
 - Alexis vs. alexis

23

E	F	G
timezone	group_list	fafsa_submit
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***

How to Structure Groups

How do you want to use groups?

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

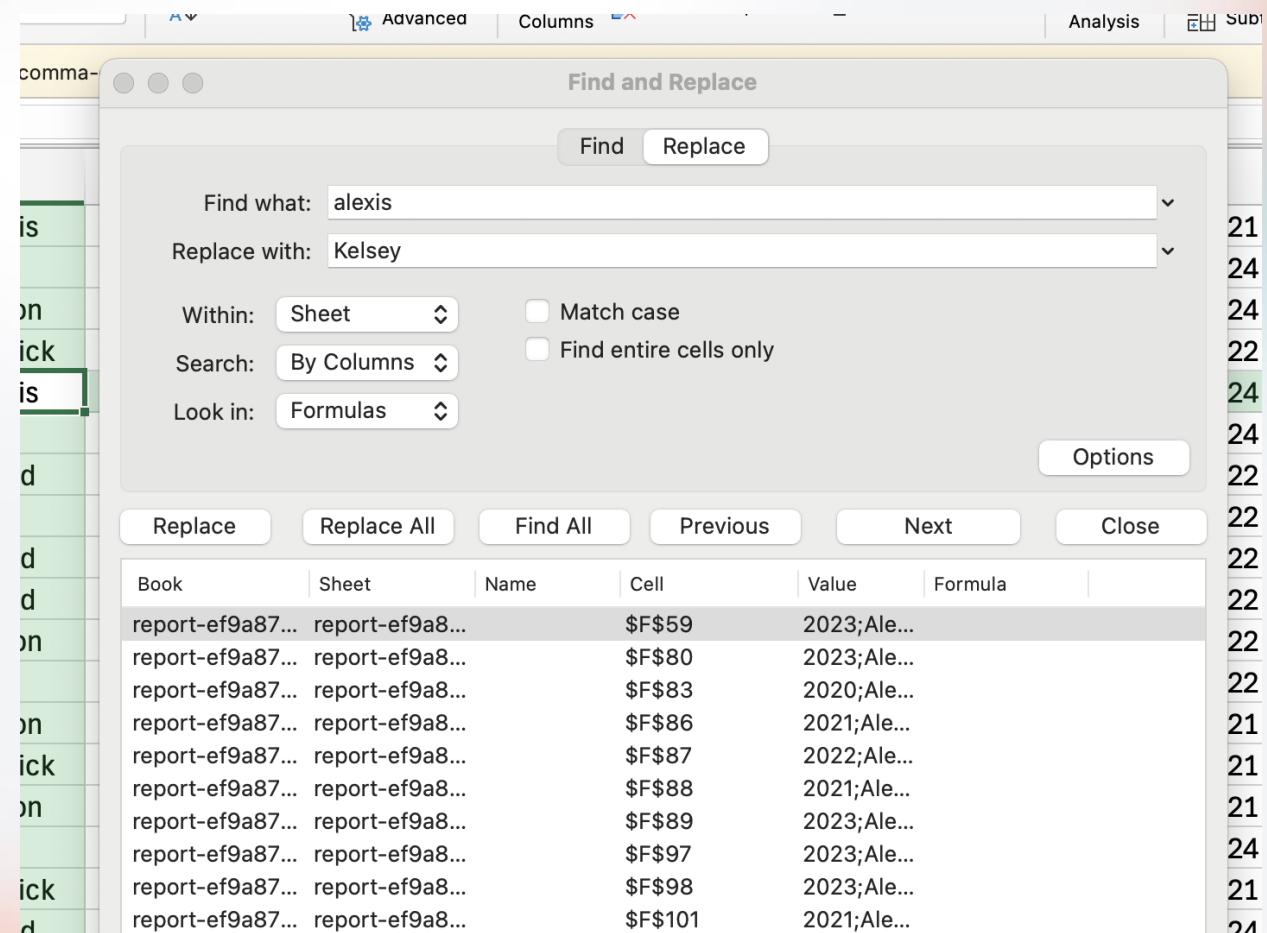
Groups vs. Advanced Search

- 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!”

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- **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!

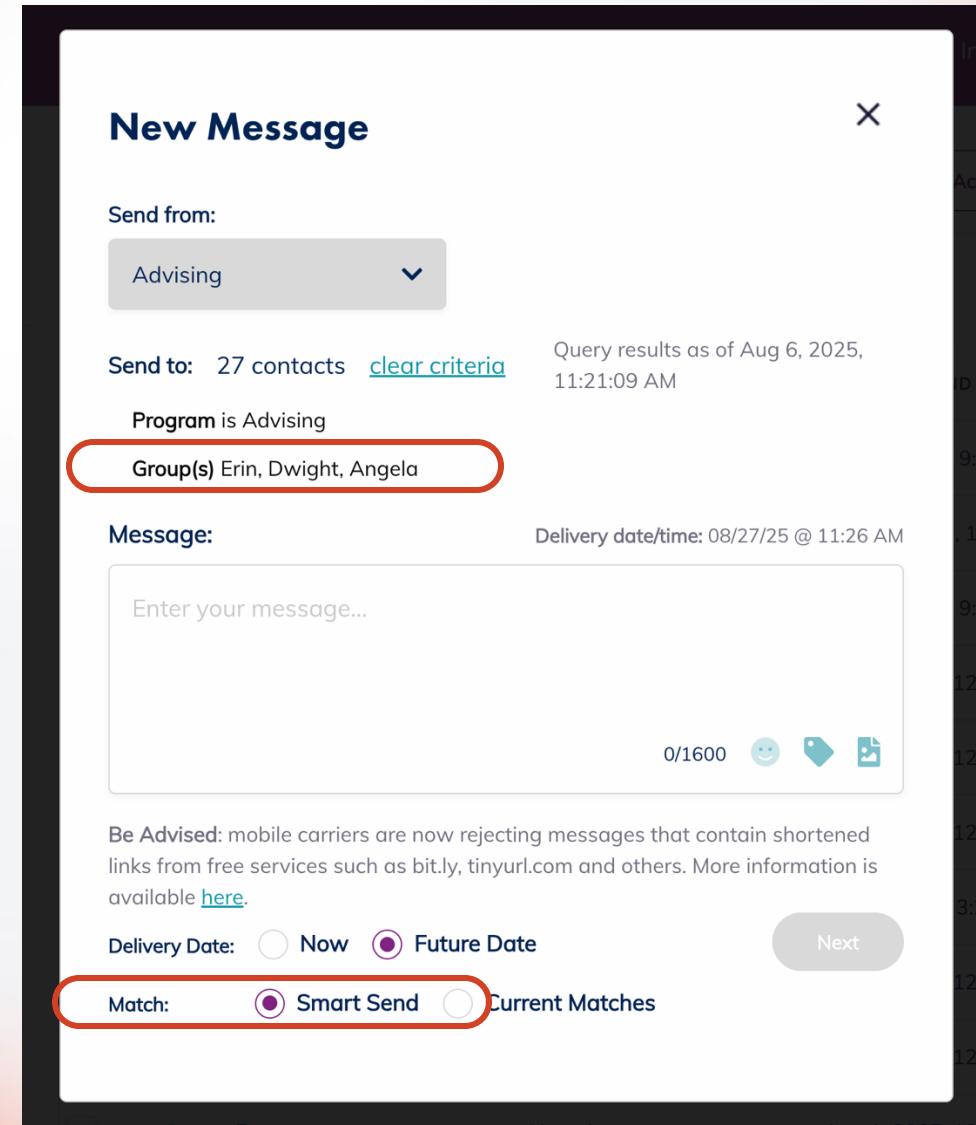
34

	E	F	G
	timezone	group_list	fafsa_submit p
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	2020;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

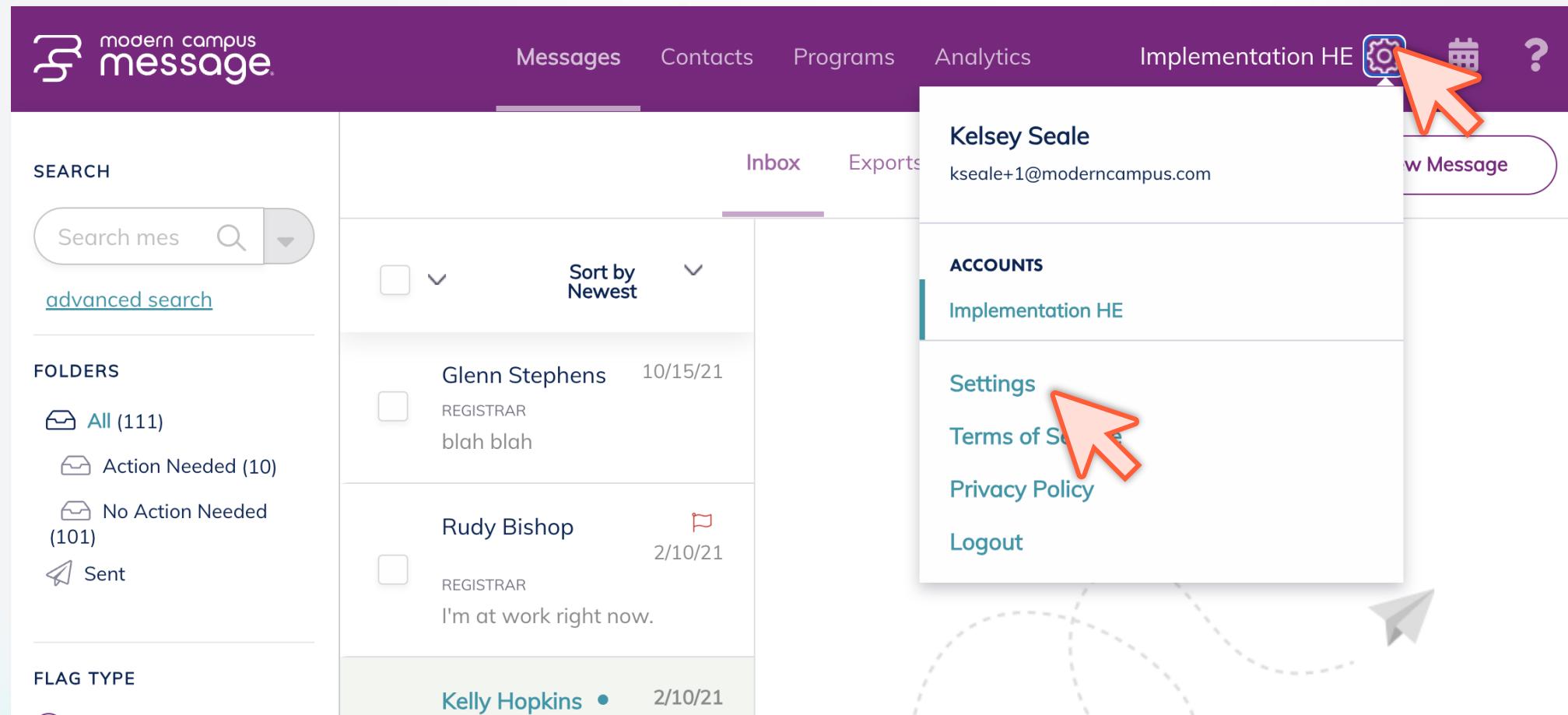
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Counselors + Groups

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

Locate User Management



The screenshot shows the modern campus message interface. The top navigation bar includes links for Messages, Contacts, Programs, Analytics, Implementation HE (which is highlighted with a red arrow), and a question mark icon. A search bar and a sidebar with Folders (All, Action Needed, No Action Needed, Sent) and Flag Type are also visible. The main area shows an inbox with messages from Glenn Stephens, Rudy Bishop, and Kelly Hopkins. A context menu is open for the user Kelsey Seal, listing options: ACCOUNTS (Implementation HE), Settings (highlighted with a red arrow), Terms of Service, Privacy Policy, and Logout. A paper airplane icon is in the bottom right corner.

SEARCH

Search mes

[advanced search](#)

FOLDERS

FLAG TYPE

Sort by Newest

Inbox Exports

Glenn Stephens 10/15/21
REGISTRAR
blah blah

Rudy Bishop 2/10/21
REGISTRAR
I'm at work right now.

Kelsey Seal
kseale+1@moderncampus.com

ACCOUNTS

Implementation HE

Settings

Terms of Service

Privacy Policy

Logout

Invite a new user

modern campus message

Messages Contacts Programs Analytics Implementation HE ?

My Preferences User Management Virtual Advisors API

Manage Users

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	

Invite New User

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modern campus message

Messages Contacts Programs Analytics Implementation HE

My Preferences User Management Virtual Advisors API

Manage Users

Active Users (10) Pending Invitations (1)

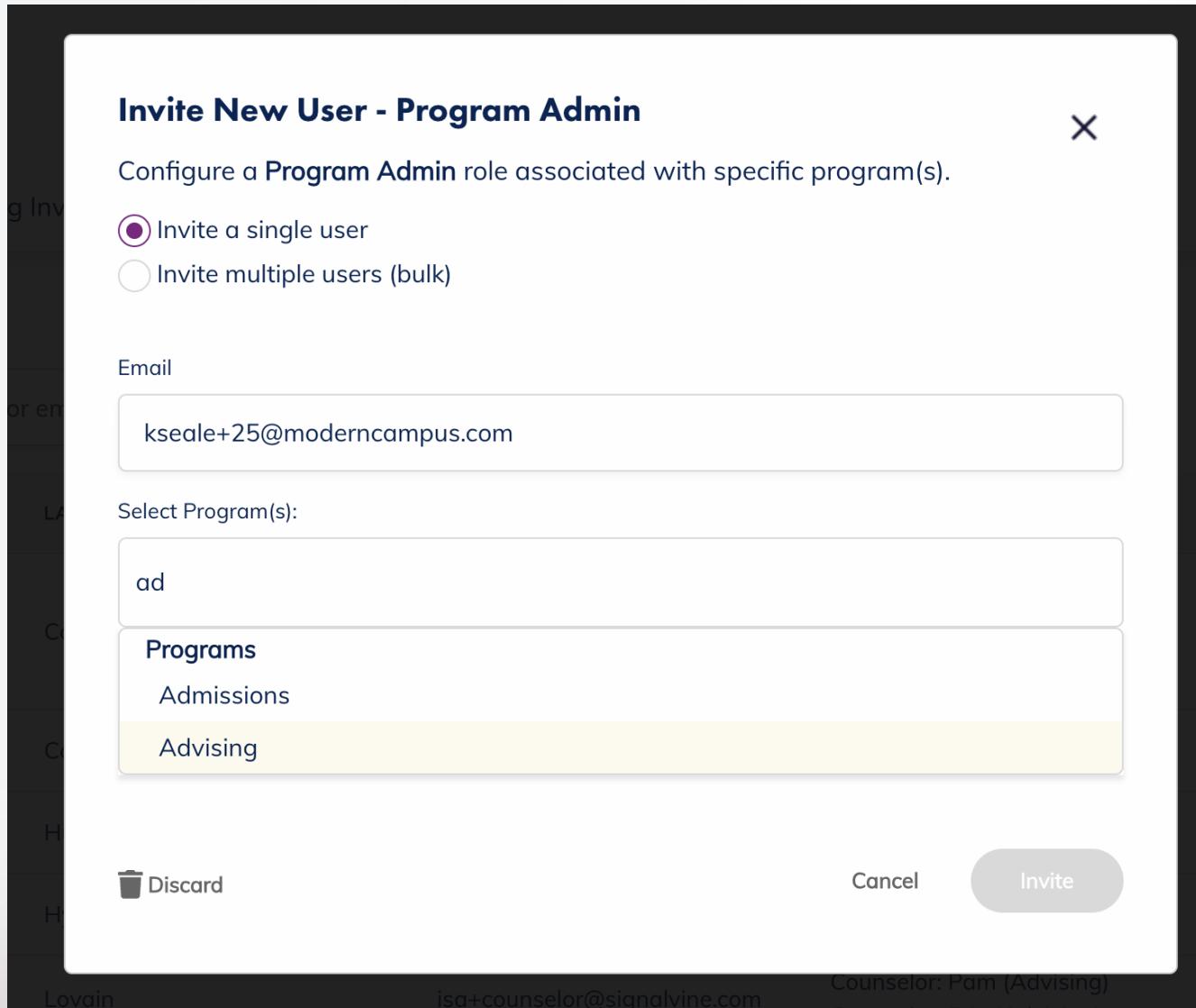
Search: Filter by first name, last name or email

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	

Invite New User

- Account Admin
- Program Admin
- Counselors

Single OR Bulk Invitation



Invite in Bulk

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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 the user will administer. [?](#)

Please select a CSV file to import (15MB max)

Select File

Cancel Review

Lovain isa+counselor@signaldvine.com

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

Resend or Revoke an Invitation

Manage Users

[Invite New User](#)

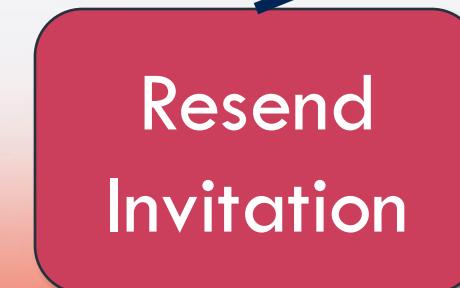
Active Users (10)

Pending Invitations (1)

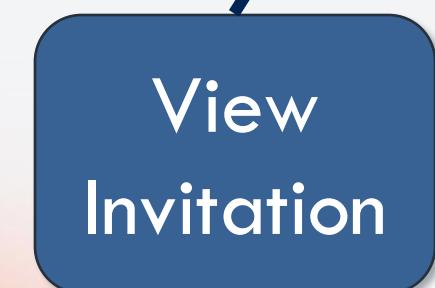


1 - 25 of 1

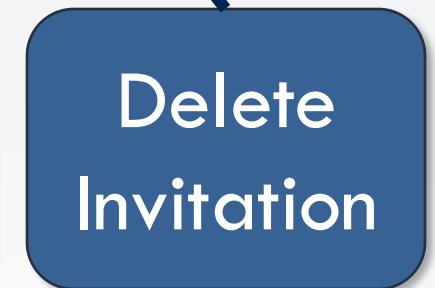
EMAIL	INVITATION DATE	ACTIONS
kseale+10@moderncampus.com	9/01/23 12:59 PM	 



Resend
Invitation



View
Invitation



Delete
Invitation

Update a User's Permissions

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User List					ACTIONS
FIRST NAME	LAST NAME	EMAIL	PERMISSIONS	ACTIONS	
Isa	Counselor	ilovain+counselor@moderncamp...	Counselor: 2021 (Financial Aid) Counselor: 2023 (Financial Aid) Counselor: Michael (Advising)	 	
Kelsey	Counselor	kse...	Counselor: 2021 (Financial Aid)	 	
Marcie	Huff	mar...	Counselor: 2021 (Financial Aid)	 	
Chris Test	Hyman Test	svt...	Counselor: 2021 (Financial Aid)	 	
Isa	Lovain	isa+counselor@signalvine.com	Counselor: Pam (Advising) Counselor: Erin (Advising)	 	

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!