



Introduce
yourself in the
chat! Which
institution are
you representing?

Group Management

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

Geared toward Account and Program Admin.

Kelsey Seale



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Modern Campus
Annual User Conference

March 1–4, 2027

The Hilton
500 E 4th St
Austin, TX 78701



modern
campus®

User Conference

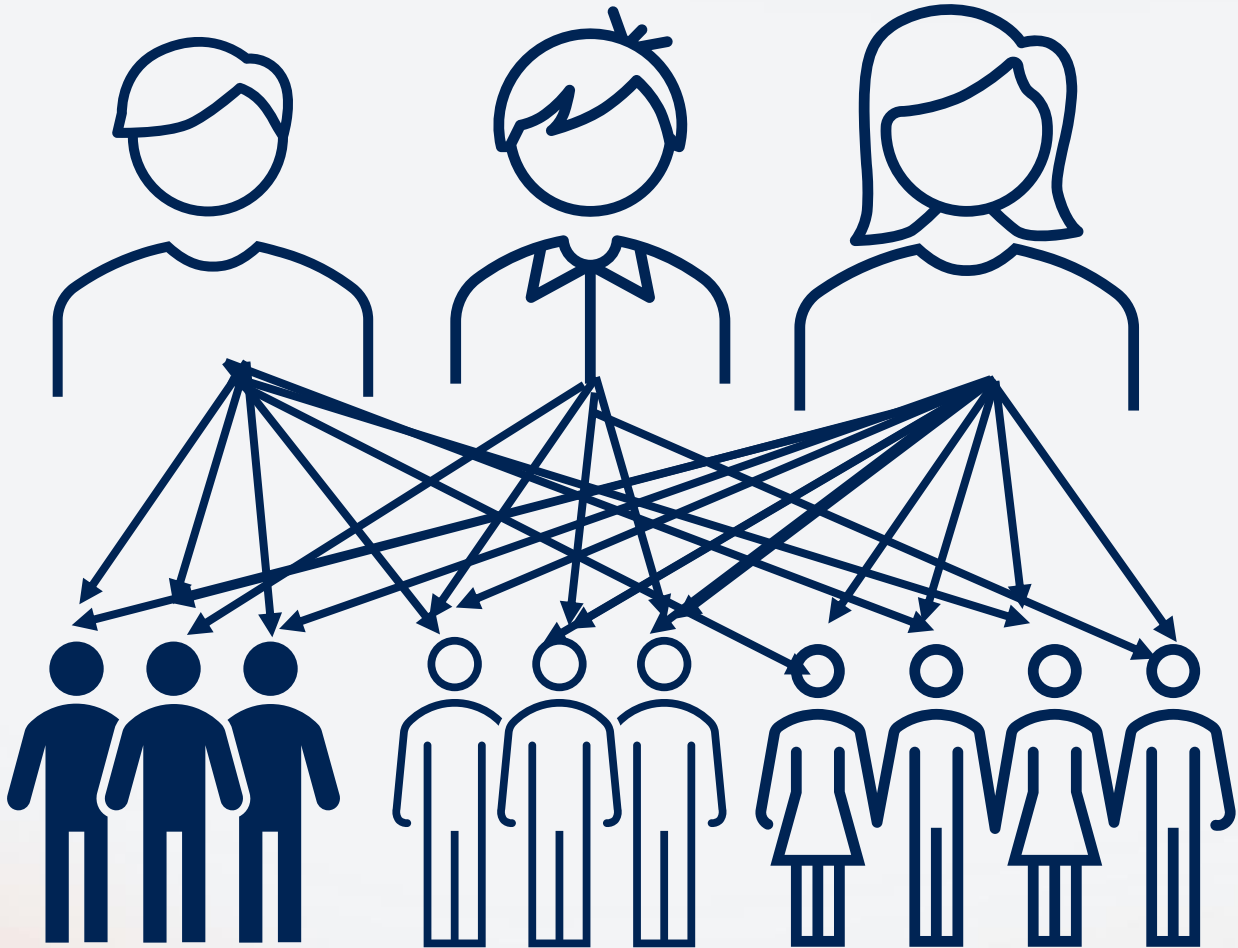
3.1.27–
3.4.27 Austin,
TX

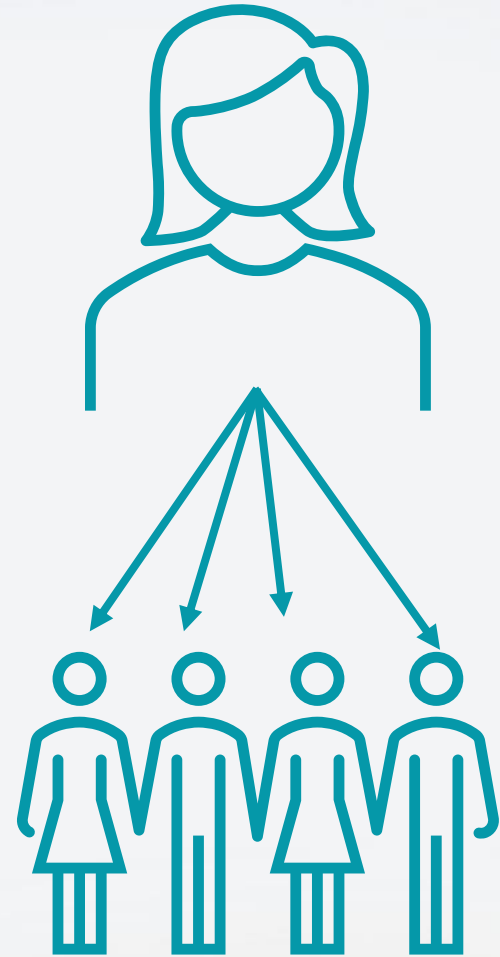
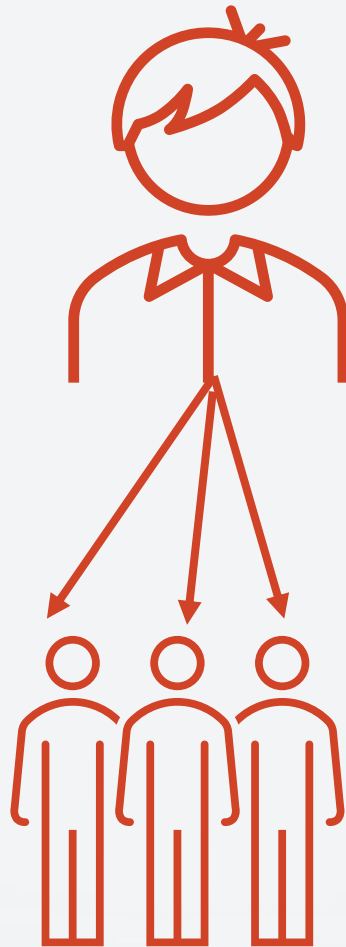
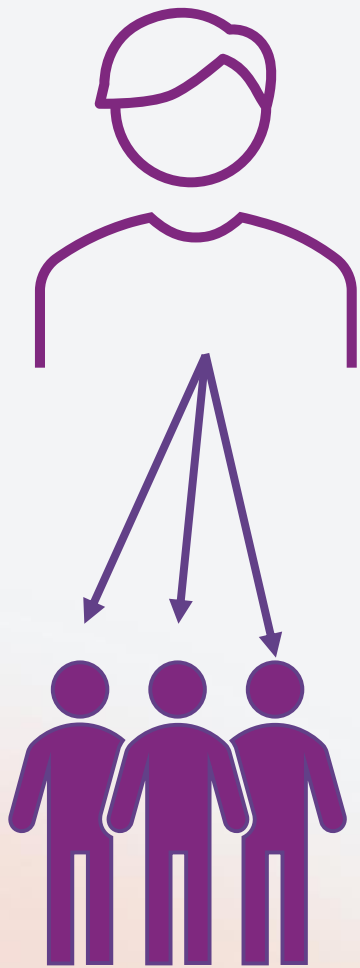
Join us at the Hilton in Austin, Texas for our 2027 annual user conference! Learn about how your peers are scaling solutions to industry challenges, and how Modern Campus is evolving to meet the needs of our customers.

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

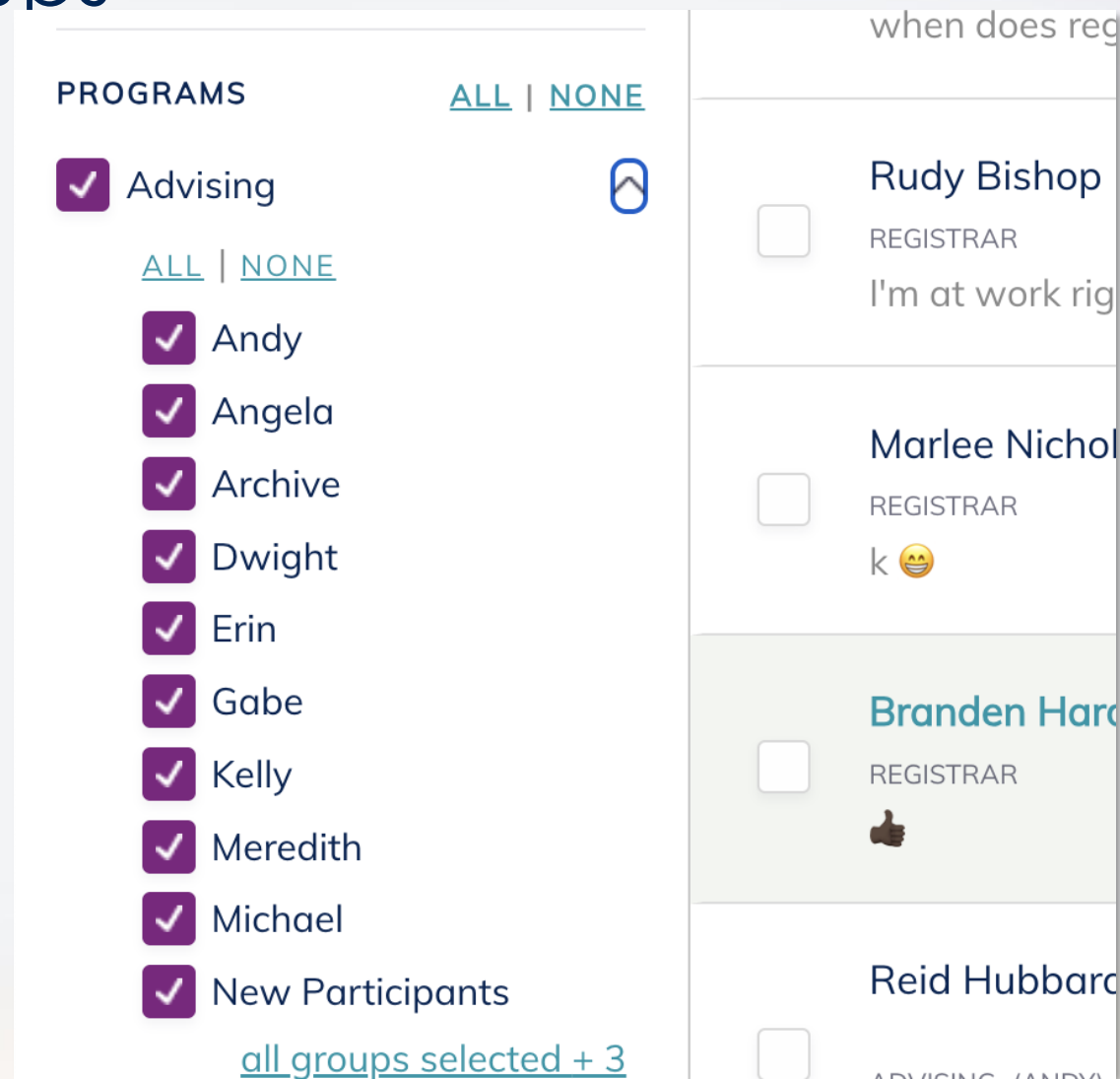
← Each group can have their own assigned counselor. Counselors can be assigned to more than one group.

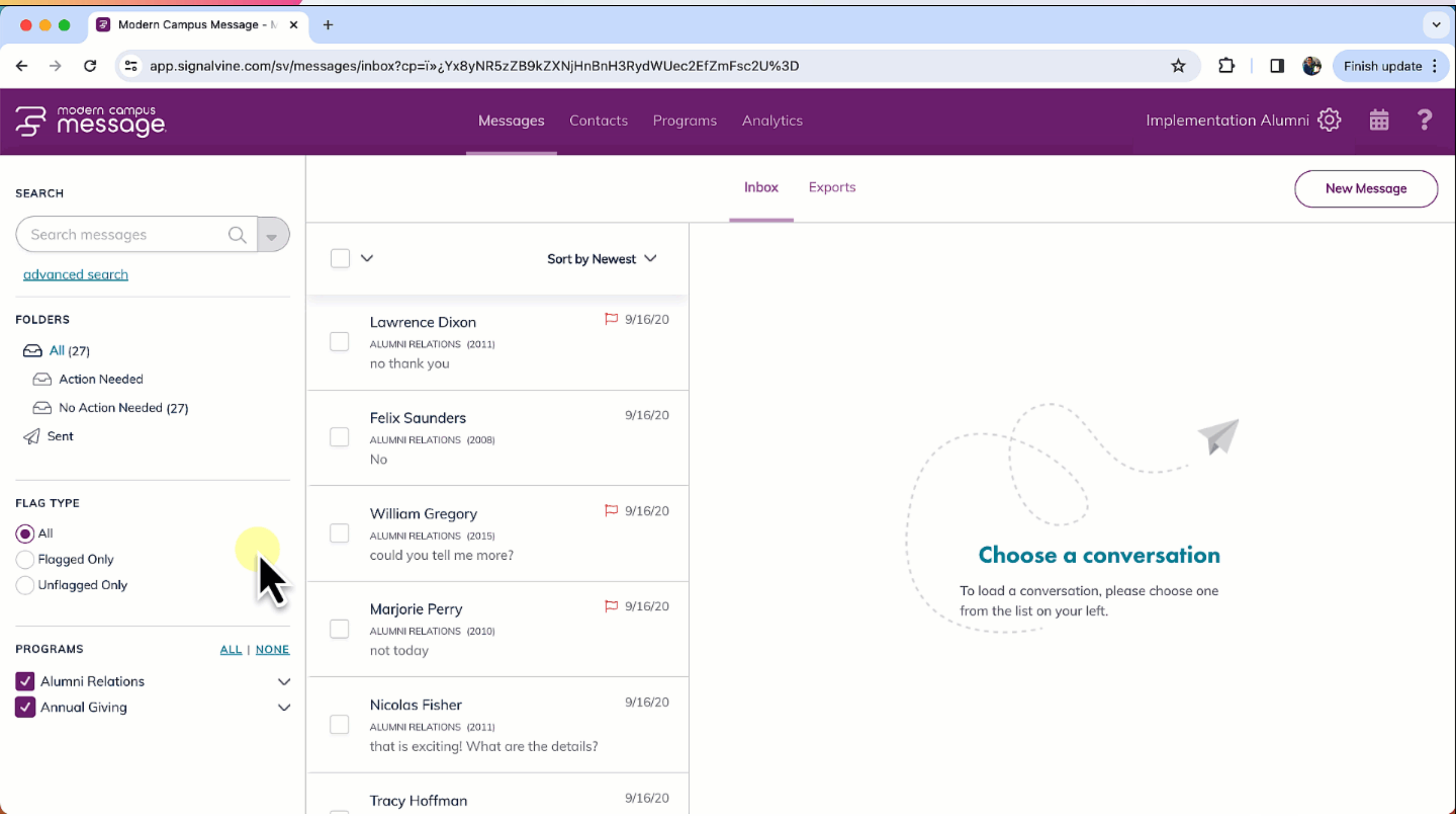
☐ Annual Giving



Groups

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





SEARCH

[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](#)

Inbox Exports

New Message

☐ 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



PII Protection

- 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



Enrolled Group



Not Enrolled
Group

Create & Delete Groups

It's all about the group_list!

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	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/Eastern	Meredith	English	2.50	Ga

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
1.5551E+10	US/Eastern	Meredith	Psychology	2.50	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	major
Eastern	New Participants	
Eastern	Gabe	Psych
Eastern	Meredith	Engin
Eastern	Angela	Com
Eastern	Michael	Econ
Eastern	Michael	Com
Eastern	Meredith	Econ
Eastern	Meredith	Nursi
Eastern	Meredith	Engin

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

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 Harc

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

☒ 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	
customer_id	major	donation_amo	staff_name	prior_donor	sig
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 the 'Export Contacts' page in the Modern Campus interface. At the top, there is a navigation bar with links: 'Message Calendar', 'Settings', 'Add Single Contact', 'Export Contacts' (which is highlighted with a purple underline), 'Manage Fields', and 'Import Contacts'. Below this, there are two sub-links: 'Autoreponder' and 'Phone Numbers'. The main heading is 'Export Contacts from Alumni Relations'. Underneath, it says 'Export Contact Data'. A paragraph explains: 'What contact data would you like us to export? Exports will be formatted as CSV file and emailed to your account email address.' There are two radio button options: 'All Contacts' (which is selected) and 'Only Unreachable Contacts'. Each option has a descriptive sentence below it. At the bottom, there is a teal button labeled 'Begin Export'.

Message Calendar Settings Add Single Contact **Export Contacts** Manage Fields Import Contacts

Autoreponder Phone Numbers

Export Contacts from Alumni Relations

Export Contact Data

What contact data would you like us to export? Exports will be formatted as CSV file and emailed to your account email address.

☒ 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.

Begin Export

What is a data file?

- The best way to create

	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

☒ 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
	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

Save As:

Tags:

Where:

 Desktop





Online Locations

File Format:



Options...

Cancel

Save

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

Do we need groups?

- 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

The screenshot shows a spreadsheet application with a 'Find and Replace' dialog box open. The dialog has tabs for 'Find' and 'Replace'. The 'Find what' field contains 'alexis' and the 'Replace with' field contains 'Kelsey'. The 'Within' dropdown is set to 'Sheet', 'Search' is 'By Columns', and 'Look in' is 'Formulas'. There are checkboxes for 'Match case' and 'Find entire cells only', both of which are unchecked. Buttons for 'Replace', 'Replace All', 'Find All', 'Previous', 'Next', and 'Close' are at the bottom. The background shows a spreadsheet with a column of names being searched.

Book	Sheet	Name	Cell	Value	Formula
report-ef9a87...	report-ef9a8...		\$F\$59	2023;Ale...	
report-ef9a87...	report-ef9a8...		\$F\$80	2023;Ale...	
report-ef9a87...	report-ef9a8...		\$F\$83	2020;Ale...	
report-ef9a87...	report-ef9a8...		\$F\$86	2021;Ale...	
report-ef9a87...	report-ef9a8...		\$F\$87	2022;Ale...	
report-ef9a87...	report-ef9a8...		\$F\$88	2021;Ale...	
report-ef9a87...	report-ef9a8...		\$F\$89	2023;Ale...	
report-ef9a87...	report-ef9a8...		\$F\$97	2023;Ale...	
report-ef9a87...	report-ef9a8...		\$F\$98	2023;Ale...	
report-ef9a87...	report-ef9a8...		\$F\$101	2021;Ale...	

“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	
	timezone	group_list	afsa_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	2023;John;DNC	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

The screenshot shows the 'New Message' interface. At the top right is a close button (X). The 'Send from:' dropdown is set to 'Advising'. The 'Send to:' field shows '27 contacts' with a 'clear criteria' link. To the right, it says 'Query results as of Aug 6, 2025, 11:21:09 AM'. Below this, a pill-shaped button shows 'Group(s) Erin, Dwight, Angela'. The 'Message:' field is a large text area with a placeholder 'Enter your message...'. To the right of the text area is the 'Delivery date/time: 08/27/25 @ 11:26 AM'. At the bottom right of the text area is a character count '0/1600' and icons for emojis, attachments, and a link. Below the text area is a warning: '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](#).' At the bottom, there are two sections: 'Delivery Date:' with radio buttons for 'Now' and 'Future Date' (selected), and 'Match:' with radio buttons for 'Smart Send' (selected) and 'Current Matches'. A 'Next' button is on the far right.

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

Match: ☒ Smart Send ☐ Current Matches

Next

Counselors + Groups

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

Locate User Management

The screenshot displays the Modern Campus Message web application. The top navigation bar is purple and contains the 'modern campus message' logo, tabs for 'Messages', 'Contacts', 'Programs', 'Analytics', and 'Implementation HE'. A gear icon (settings) is highlighted with a pink arrow, and a calendar icon is also visible. A dropdown menu is open from the gear icon, showing the user 'Kelsey Seale' (kseale+1@moderncampus.com) and a list of options: 'ACCOUNTS', 'Implementation HE', 'Settings' (highlighted with a pink arrow), 'Terms of Service', 'Privacy Policy', and 'Logout'. The main content area shows an 'Inbox' with a list of messages. The left sidebar contains a 'SEARCH' bar, a link to 'advanced search', and a 'FOLDERS' section with 'All (111)', 'Action Needed (10)', 'No Action Needed (101)', and 'Sent'. A 'FLAG TYPE' section is at the bottom of the sidebar. The message list includes entries for Glenn Stephens (10/15/21) and Rudy Bishop (2/10/21), both from the REGISTRAR. A pink arrow points to the 'Settings' option in the dropdown menu.

modern campus
message

Messages Contacts Programs Analytics Implementation HE

SEARCH

Search mes

[advanced search](#)

FOLDERS

All (111)

Action Needed (10)

No Action Needed (101)

Sent

FLAG TYPE

Inbox Exports

Sort by Newest

Glenn Stephens 10/15/21

REGISTRAR

blah blah

Rudy Bishop 2/10/21

REGISTRAR

I'm at work right now.

Kelly Hopkins • 2/10/21

Kelsey Seale
kseale+1@moderncampus.com

ACCOUNTS

Implementation HE

Settings

Terms of Service

Privacy Policy

Logout

New Message

Invite a new user



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 ^

Active Users (10) Pending Invitations (1)

Search:

Filter by first name, last name or email

Account Admin
Program Admin
Counselors



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

Invite New User - Program Admin

×

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

☒ Invite a single user

☐ Invite multiple users (bulk)

Email

kseale+25@moderncampus.com

Select Program(s):

ad

Programs

Admissions

Advising

Discard

Cancel

Invite

Lovainisa+counselor@signalvine.comCounselor: Pam (Advising)

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 max)

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

Filter by first name, last name or email

FIRST NAME	LAST NAME	EMAIL		ACTIONS
Isa	Counselor	ilovain+counselor@moderncamp...	Counselor: 2021 (Financial Aid) Counselor: 2023 (Financial Aid) Counselor: Michael (Advising)	 
Kelsey	Counselor	kseale+4@modern...		 
Marcie	Huff	marciers@gmail.c...		 
Chris Test	Hyman Test	svtest@wugs.me		 
Isa	Lovain	isa+counselor@signalvine.com	Counselor: Pam (Advising) Counselor: Erin (Advising) Counselor: East (Advising)	 

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 into
the Zoom Q&A feature!



Scan for a two minute
feedback survey

Post-Webinar Survey: Link is in the chat!

Post-Webinar Survey

- 2 minutes
- We love knowing what you like or would like improved!

45

* 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.



Scan for a two minute
feedback survey

Thank You

See you next month!