Send a General or Priority Message (Messenger 2.0)

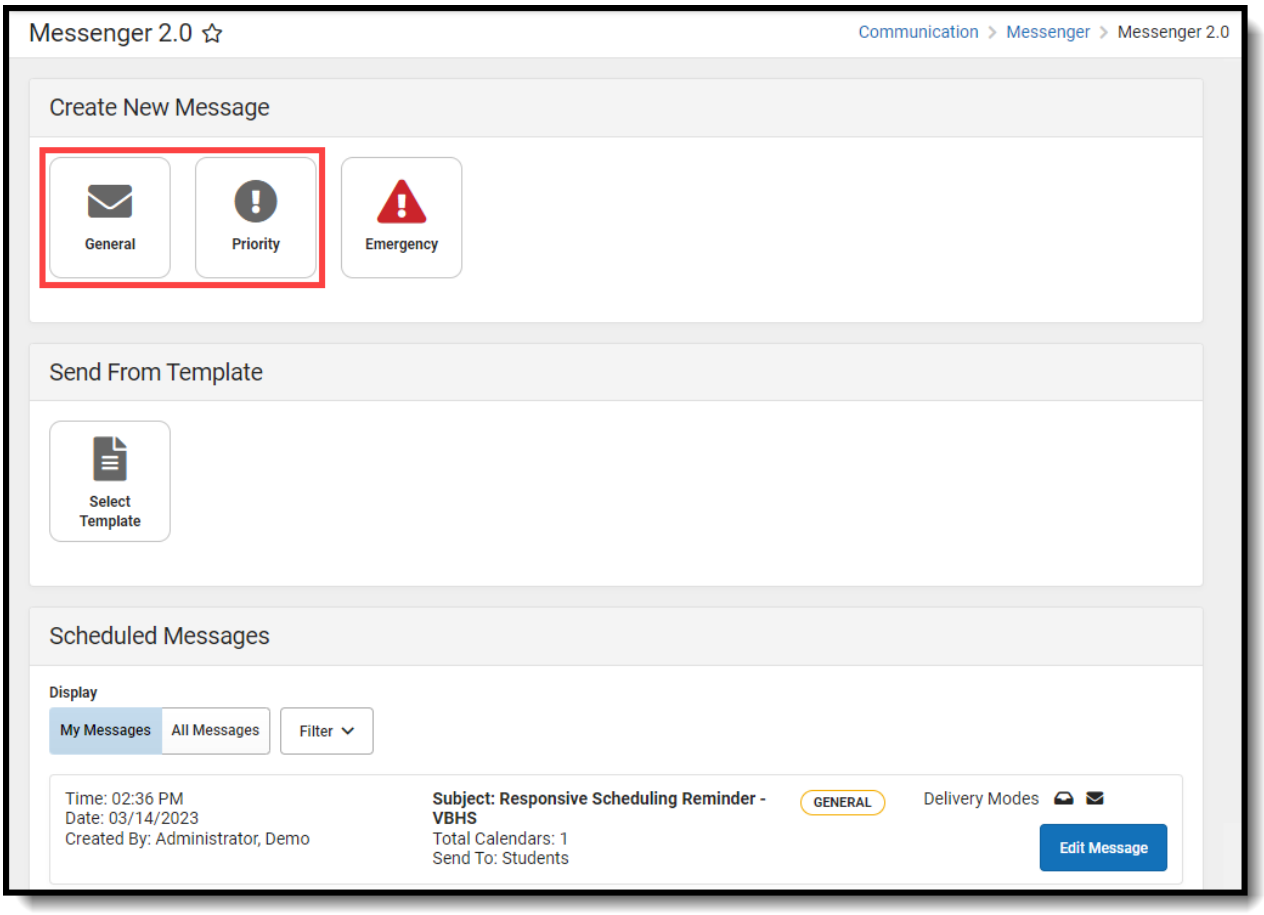
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Tool Search: Messenger

The procedures on this page describe how to send a general or priority message via inbox, email, voice or text to students, Messenger contacts, and/or staff.

General messages and Priority messages have identical workflows. They differ in that General messages will only contact email addresses and phone numbers that have been marked 'General' under Census > People > Demographics > Messenger Preferences Contact Reasons, and Priority messages will only contact email addresses and phone numbers that have been marked 'Priority' under Census > People > Demographics > Messenger Preferences Contact Reasons.

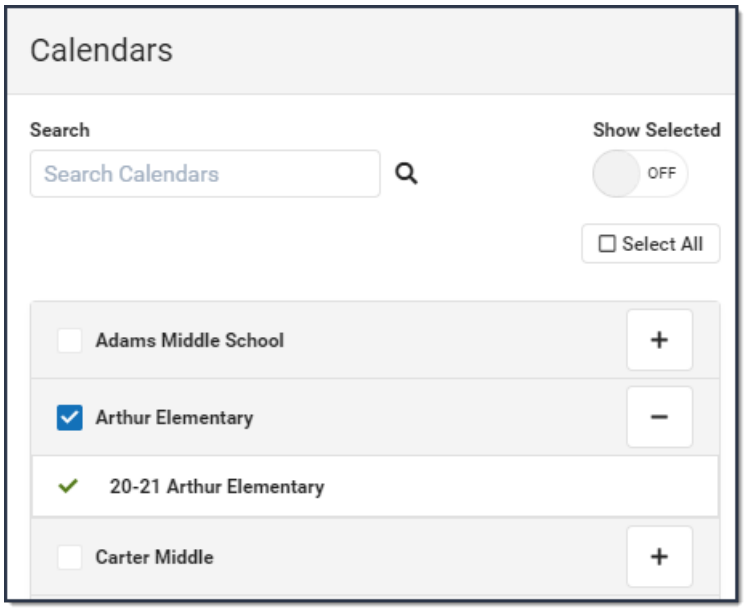
For detailed descriptions of each field in the message builder, see the Messenger Field Descriptions article.



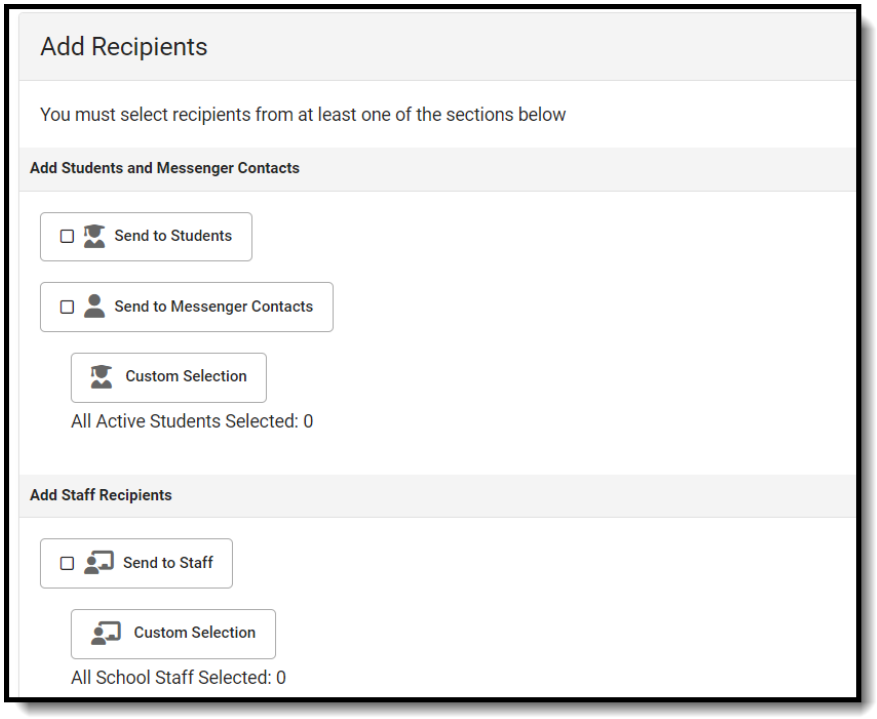
Send a General or Priority Message

Step 1. Recipients

1. Select **General** or **Priority**.
   Result: *Step 1 Recipients* displays.
2. Select the Delivery Mode: **Inbox**, **Email, Voice,** and/or **Text**.
3. Select a **School Year**.
   Tip: The default selection is the current school year.
4. Select **Select Calendars**.
   Result: The Calendars panel displays. Use the **+** (plus) and **-** (minus) buttons to view or hide additional calendars.
   Click here to expand...

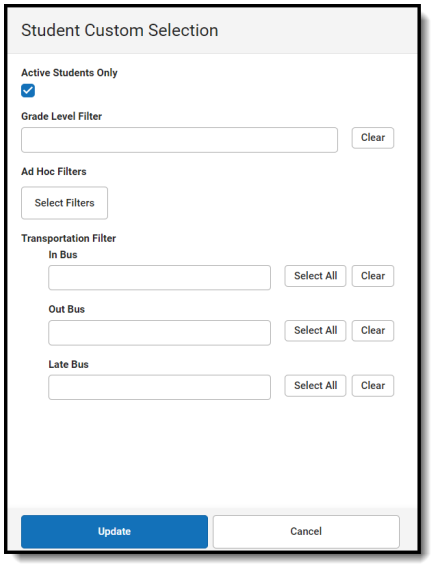


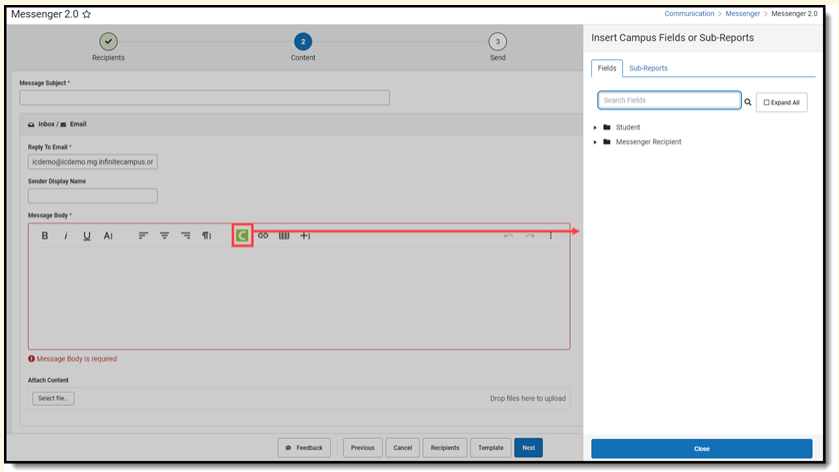
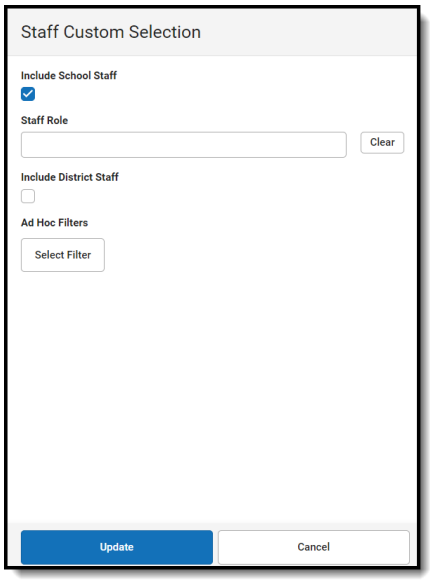
5. Select a **Preferred Language** preference. (Optional)
6. Select at least one recipient group from **Add Recipients**:

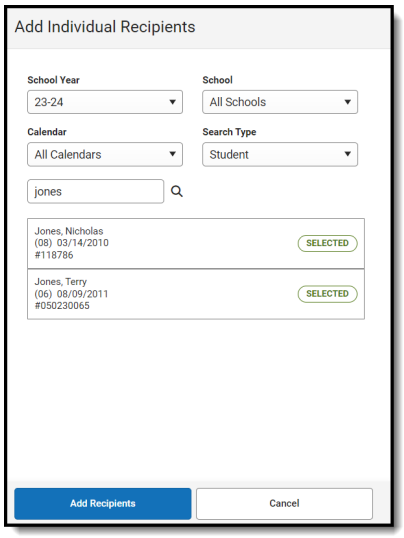


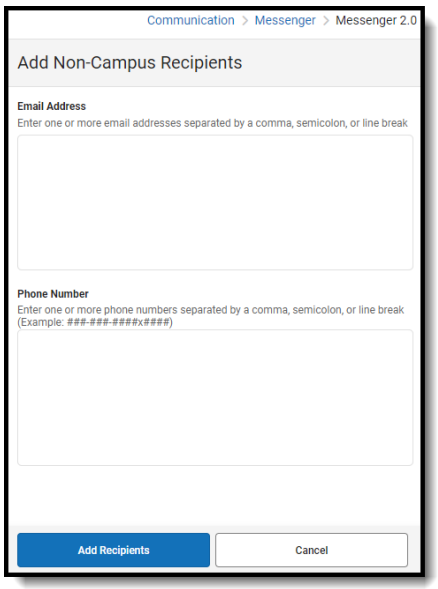
Messenger Contacts are filtered by the student list.

Option	Description

Send to Students	Includes students in the selected calendar(s). **Student Custom Selection:** Includes all active students by default with the ability to filter the student list with the following options: Grade Level, Ad Hoc, and Transportation Filter. The Transportation Filter allows for sending messages directly to students on buses and Messenger Contacts based on which bus the student rides. Click **Update** when you are done. Grade Level Filter will only show grade levels that exist in Calendars within the School Year selected. 

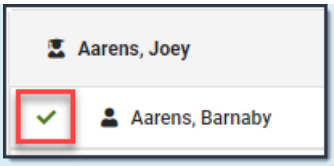
Send to Messenger Contacts	Messenger Contacts are filtered by the student list. If a Student Field and/or Student Sub-Report is added into any Message Body on Step 2, the Messenger Contact will receive one message per student with whom they have a Messenger relationship. If no Student Fields/Sub-Reports are present, the Messenger Contact will receive one message from this one message per delivery mode regardless of how many students with whom they have a Messenger relationship. 
Send to Staff	Includes staff in the selected calendar(s). **Staff Custom Selection**: Includes all current school staff, including those with a future start date, at schools of the selected calendar(s). From here you can select specific Staff Roles, mark the checkbox to **Include District Staff**, and/or select predefined Ad Hoc filters. Click **Update** when you are done. 

Add Individual Recipients	To add individuals who are not filtered by Calendars, School Year, or Preferred Language, click **Add Individual Recipients**. Choose from the available filters or enter a name. Select the desired recipients and click **Add Recipients**. Fields and/or Sub-Reports cannot to be added to the message bodies on Step 2 when using Add Individual Recipients.  To remove individual recipients: 1. Click **Recipients**. 2. Select the Other Recipients tab in the Recipients side panel. 3. Click **Remove** next to their name. 4. Click **Update**.

Add Non-Campus Recipients	Click the **Add Non-Campus Recipients** and enter one or more email addresses/phone numbers of non-Campus recipients. Click **Add Recipients** after they have been entered. These email addresses and phone numbers will be contacted via the delivery mode selected between Email, Voice, and Text. Email addresses and phone numbers will be saved to Messenger Templates and Scheduled Messages, as well as recorded in the Sent Message Log. Fields and/or Sub-Reports cannot to be added to the message bodies on Step 2 when using Add Non-Campus Recipients.  To remove non-Campus recipients: 1. Click **Recipients**. 2. Select the Other Recipients tab in the Recipients side panel. 3. Click **Remove** next to their name. 4. Click **Update**.

7. Click the **Recipients** button to display a side panel to review the recipient list. If necessary, exclude recipients and click the **Update** button on the panel when you are done. You may also click the down arrow next to Update to select Update and Generate CSV. This will create a CSV report that contains data related to the message and each of the recipients. For more information, review Recipient Report. (Optional)

   By default, all recipients are automatically selected to receive the message. Click the person's name to exclude them as a message recipient. A checkmark next to the person's name means they will receive the message. No checkmark next to the person's name means they will **not** receive the message. In the following example, the person **will** receive the message.



8. Select **Next**.
   Result: Step 2 Content displays.

Step 2. Content

1. Enter the subject of the message in **Message Subject**.
2. Complete the following **Inbox**, **Email, Voice,** and/or **Text** options.

Option	Description
Inbox	Compose the body of the message in the **Message Body**. Attachments are not sent with Inbox messages.
Email	◦ Enter or confirm the correct email is showing in the **Reply to Email** field. **Tip**: This Field is only editable if the *Allow Custom Sender's Email Address* checkbox is marked in the Email Settings tab of Messenger Admin. ◦ Enter a **Sender Display Name**. *(Optional)* ◦ Compose the body of the message in the **Message Body**. ◦ Click the **Select File** button to attach a file to the email. *(Optional)*
Voice	Select one of the following options: ◦ **Upload** - Use this option to attach a pre-recorded .WAV file. ◦ **Text-to-Speech** - Use this option to have Campus convert text from the **Voice Message Body** field on this screen to a voice message. If you are also sending an Email message the **Voice Message Body** field is not available and the Message Body from the Email card will be converted instead. When using voice messaging, this call chain determines the order in which each recipient's phone numbers are contacted: 1. Household Phone 2. Cell Phone 3. Work Phone 4. Other Phone

Option	Description
Text	Compose the body of the message in **Text Message Body**. Hyperlinks for text messages must be written as full URLs (e.g., https://www.infinitecampus.com).

3. Optionally, follow one of two workflows within **Preview/Test** to view a message before sending it to recipients. Test messages will be sent in context of the recipient.

Option	Description
Preview	 ◦ Click **Preview** after entering all the required fields. ◦ Select a recipient you'd like to preview the message for from the Preview side panel. All selected message types will now appear the way it would to the individual who will receive it. ◦ To send a test message in the context of the selected recipient, enter an email address and/or phone number in the appropriate field in the test area of the Preview side panel and click **Send**. The test message will send with populated fields and/or sub-reports, if they were included in the message. ◦ Click **Close** when you have finished previewing the message.
Test	 ◦ Enter a valid email address in the **Email** field. ◦ Click **Send Test Email**. Up to five email addresses can be entered and email addresses must be separated by a comma.

Infinite Campus strongly recommends previewing or testing messages before delivering them.

4. Select **Next**.
   Result: Step 3. Send displays.

Step 3. Send

1. Select **Send Now, Schedule One-Time, or Schedule Recurring**.

Option	Description
Send Now	Deliver the message as soon as the Send step is completed. The **Send Now** option is not available if you are trying to send a text/voice message outside of the district-wide dialing window.
Schedule One-Time	Schedule a message to be sent a single time in the future. The recipient list for this message will be generated at the time of delivery. ◦ Enter the **Date** the message will be sent. ◦ Enter the **Inbox/Email Time** the message will be sent. ◦ Enter the **Voice/Text Message Time** the message will be sent.
Schedule Recurring	Schedule a message to be sent on a recurring basis. The recipient lists for these messages will be generated at the time of delivery. ◦ Enter the **Inbox/Email Time** the message will be sent. ◦ Enter the **Voice/Text Message Time** the message will be sent. ◦ Setup the Recurrence Pattern based on **Day(s) of the Week** or **Custom Dates**: ▪ **Day(s) of the Week** 1. Click the **Day(s) of the Week** radio button. 2. Select the days of the week the message will be sent. 3. Select the **Frequency** the message will be sent. 4. Select a **Start** and **End Date** for the message. ▪ **Custom Dates** 1. Click the **Custom Dates** radio button. 2. Click the day the message will be sent in the **Select Dates** calendar.

2. Confirm you would like to receive a confirmation email that the message was successfully processed by marking the **Confirmation Email** checkbox.
3. Click **Review**. A pop-up will display the number of message recipients for each selected Delivery Mode. Use **View Recipient Details** to download the Recipient Report before sending the message.
4. Click **Send**. After you initiate the send message process, you'll be taken back to the main Messenger 2.0 screen. The message then starts processing and shows up in the 'In Progress' tab of Upcoming Messages.

While the message is processing, you can leave the screen and return later to check your message details. A status label below the 'Created By' field shows the progress of the message in

the sending process. After the message is fully processed, it leaves the 'In Progress' tab and moves to the Sent Message Log 2.0. For more information about In Progress messages and their statuses, read the Upcoming Messages documentation. A warning displays if you are scheduling a voice/text message to go out within 30 minutes of the dial window closing. If the dial window closes while this message campaign is in progress, all calls/texts are stopped at the dial window end time.

Recipient Report

After Students, Messenger Contacts, or Staff have been selected under Send To, a report can be generated to preview:

- Total and Distinct recipient counts.
- Full recipient list and the delivery modes they are eligible to be contacted at.
- A list of recipients who do not have an eligible delivery mode to be contacted at.
- A list of excluded recipients.

Generating Recipient Report

1. Click the Recipients button.
2. Click the down arrow next to Update.
3. Click Update and Generate CSV. The report will then download to your computer.



Recipient Report Definitions

Term	Definition
Total People	Total number of distinct people pulled into the recipient list.
Total Eligible Recipients	Total number of distinct people eligible to receive a message. Excludes: missing devices, contact preferences, excluded people.
Distinct Inbox	Total number of people eligible to receive a process inbox message.
Distinct Email	Total number of people eligible to receive email messages.
Distinct Voice	Total number of people eligible to receive a voice call.
Distinct Text	Total number of people eligible to receive a text message. Note: If a recipient confirms the voice call they will not receive a text message

Excluded Recipients	Number of recipients that were excluded. Note: Messenger contacts must be excluded from receiving a message from all students to be counted.
No Device	Number of people who do not have an eligible device to receive a message.