

Send a General or Priority Message (Messenger 2.0)

Last Modified on 09/09/2025 3:47 pm CDT

[Send a General or Priority Message](#) | [Recipient Report](#)

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.

Messenger 2.0 ☆

Communication > Messenger > Messenger 2.0

Create New Message

General

Priority

Emergency

Send From Template

Select Template

Scheduled Messages

Display

My Messages



All Messages

Filter ▾

Time: 02:36 PM
Date: 03/14/2023
Created By: Administrator, Demo

Subject: Responsive Scheduling Reminder - VBHS
Total Calendars: 1
Send To: Students

GENERAL

Delivery Modes



Edit Message

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Page 1

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...](#)

Calendars

Search

Show Selected

☐ OFF

☐ Select All

<input type="checkbox"/>	Adams Middle School	<input type="button" value="+"/>
<input checked="" type="checkbox"/>	Arthur Elementary	<input type="button" value="-"/>
<input checked="" type="checkbox"/>	20-21 Arthur Elementary	
<input type="checkbox"/>	Carter Middle	<input type="button" value="+"/>


5. Select a **Preferred Language** preference. (Optional)


6. Select at least one recipient group from **Add Recipients**:


Add Recipients

You must select recipients from at least one of the sections below

Add Students and Messenger Contacts


☐  Send to Students


☐  Send to Messenger Contacts

☐  Custom Selection

All Active Students Selected: 0

Add Staff Recipients

☐  Send to Staff

☐  Custom Selection

All School Staff Selected: 0

Messenger Contacts are filtered by the student list.

Option	Description
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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.

Student Custom Selection

Active Students Only

☒

Grade Level Filter

Clear

Ad Hoc Filters

Select Filters

Transportation Filter

In Bus

Select All

Clear

Out Bus

Select All

Clear

Late Bus

Select All

Clear

Update

Cancel

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.

The screenshot shows the 'Messenger 2.0' interface with the 'Send' tab selected. The 'Message Body' field is highlighted with a red box and a red arrow pointing to the 'Insert Campus Fields or Sub-Reports' panel on the right. The panel shows a search bar and a list of fields including 'Student' and 'Messenger Recipient'.

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.

The screenshot shows the 'Staff Custom Selection' dialog box. It includes checkboxes for 'Include School Staff' (checked) and 'Include District Staff' (unchecked). There is a 'Staff Role' dropdown menu with a 'Clear' button. Below that is an 'Ad Hoc Filters' section with a 'Select Filter' button. At the bottom are 'Update' and 'Cancel' buttons.

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.

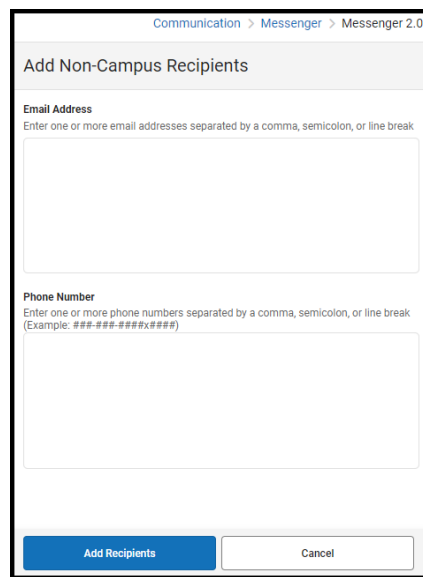
To remove individual recipients:

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.

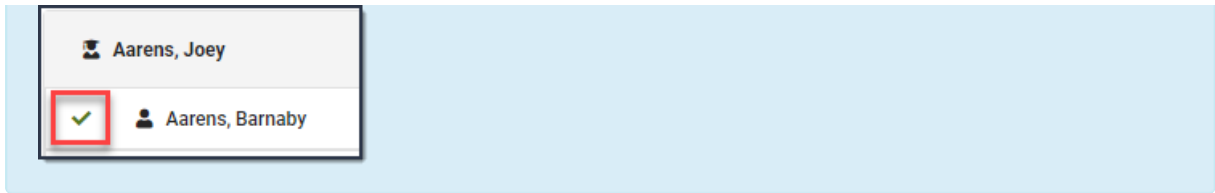


To remove non-Campus recipients:

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	<p>Compose the body of the message in the Message Body.</p> <p>Attachments are not sent with Inbox messages.</p>
Email	<ul style="list-style-type: none"> ◦ Enter or confirm the correct email is showing in the Reply to Email field. Tip: This Field is only editable if the <i>Allow Custom Sender's Email Address</i> 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	<p>Select one of the following options:</p> <ul style="list-style-type: none"> ◦ 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.
Text	<p>Compose the body of the message in Text Message Body.</p> <p>Hyperlinks for text messages must be written as full URLs (e.g., https://www.infinitecampus.com).</p>

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
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Option	Description
Preview	 <ul style="list-style-type: none"> ◦ 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	 <ul style="list-style-type: none"> ◦ 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**.

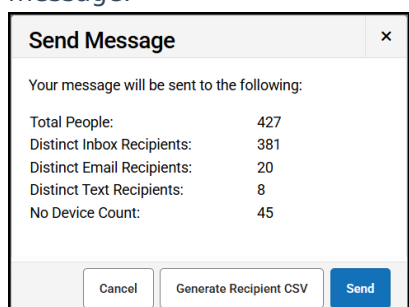
Result: Step 3. Send displays.

Step 3. Send

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

Option	Description
Send Now	<p>Deliver the message as soon as the Send step is completed.</p> <p>The Send Now option is not available if you are trying to send a text/voice message outside of the district-wide dialing window.</p>
Schedule One-Time	<p>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.</p> <ul style="list-style-type: none"> 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	<p>Schedule a message to be sent on a recurring basis. The recipient lists for these messages will be generated at the time of delivery.</p> <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> Day(s) of the Week <ol style="list-style-type: none"> Click the Day(s) of the Week radio button. Select the days of the week the message will be sent. Select the Frequency the message will be sent. Select a Start and End Date for the message. Custom Dates <ol style="list-style-type: none"> Click the Custom Dates radio button. Click the day the message will be sent in the Select Dates calendar.

- Confirm you would like to receive a confirmation email that the message was successfully sent by marking the **Confirmation Email** checkbox. Clear the checkbox if you do not want to receive *a message sent successfully* email.
- Click **Send**. An alert will display the number of message recipients for each selected Delivery Mode. Use the 'Generate Recipient CSV' to download the Recipient Report before sending the message.



Send Message [X]

Your message will be sent to the following:

Total People:	427
Distinct Inbox Recipients:	381
Distinct Email Recipients:	20
Distinct Text Recipients:	8
No Device Count:	45

- Click **Send**.

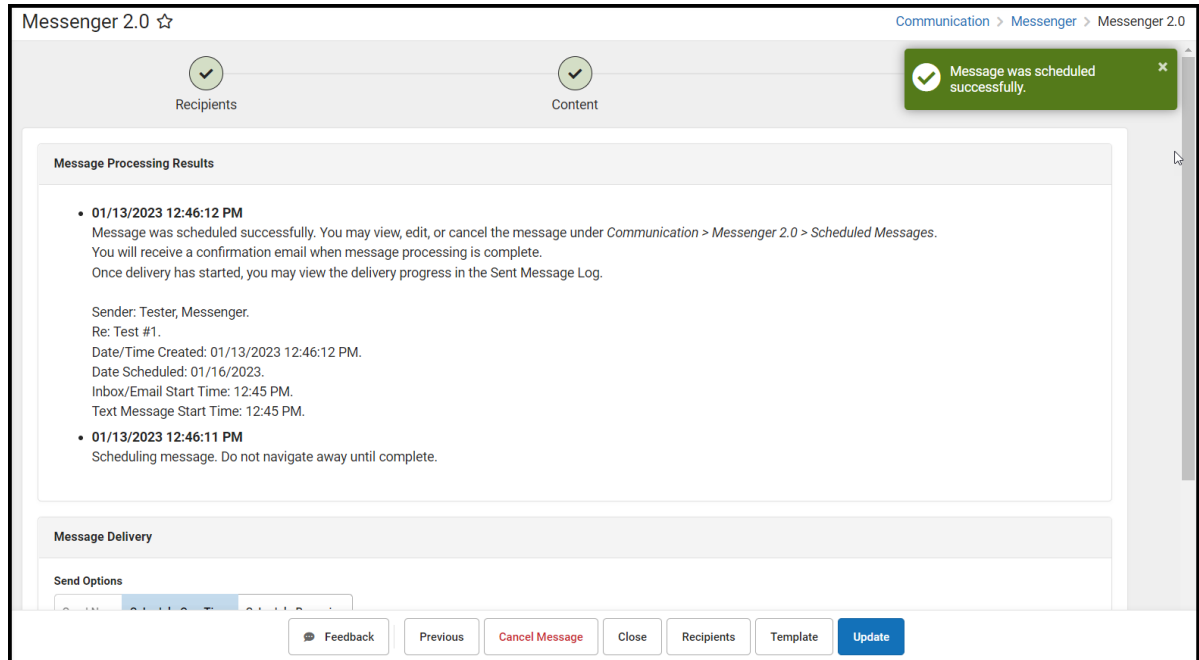
Result

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 sped at the dial window end time.

A confirmation appears and the **Message Processing Results** display. From here you can see how many messages were sent and you have the option to send the message again.

► [Click here to expand...](#)



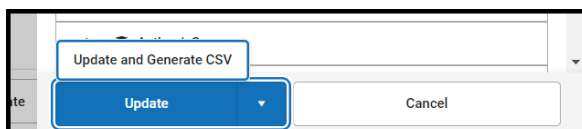
Recipient Report

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	<p>Total number of people eligible to receive a text message.</p> <p>Note: If a recipient confirms the voice call they will not receive a text message</p>
Excluded Recipients	<p>Number of recipients that were excluded.</p> <p>Note: Messenger contacts must be excluded from receiving a message from all students to be counted.</p>
No Device	Number of people who do not have an eligible device to receive a message.