



# **Message Media Documentation**

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## **About**

Campus Café offers an API with Message Media, a vendor that facilitates text messaging otherwise known as short message service (SMS). Once the API is enabled, Campus Café will accommodate bidirectional text messaging. Campus Café clients are responsible for opening an account with Message Media.

## **Federal law**

Under the U.S. Telephone Consumer Protection Act (TCPA), customers must give businesses “express written consent” to send them texts. The law specifically precludes business from running an “opt-out” campaign. Campus Café clients are responsible for obtaining consent, which may be recorded in Campus Café.

# Technical Setup

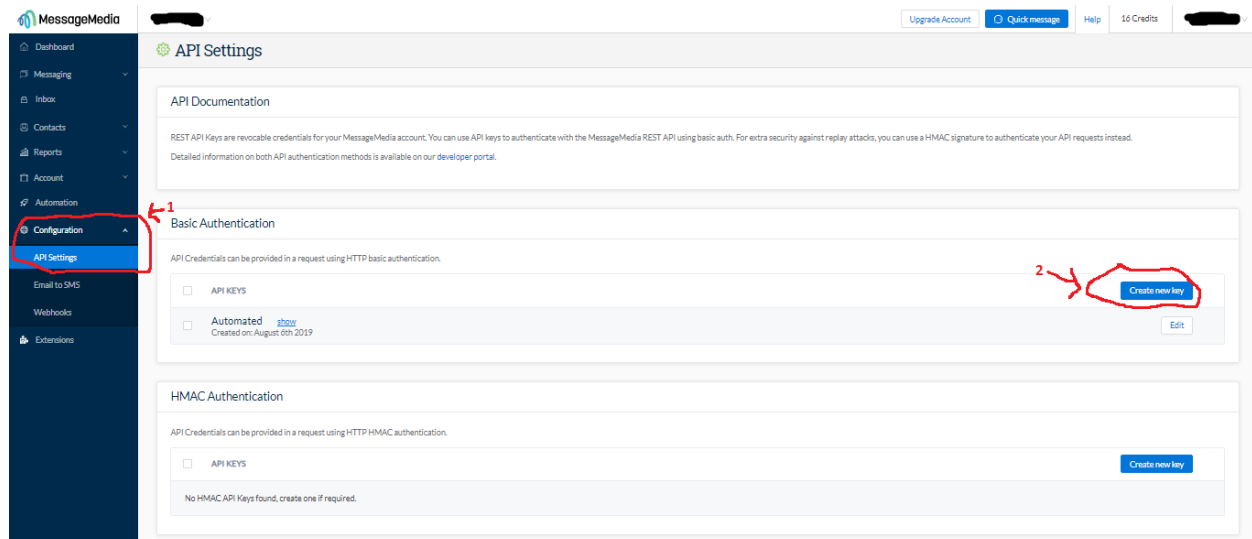
Campus Café facilitates either one-way texting or bidirectional texting.

## Permissions Required

- User completing technical setup must have access to permission 293 under the System Admin (SY) module.
- 1092 under the global module is required to send a message
- User must have access to the activity tracking member

## Option 1: Basic setup (One-way texting)

1. Log in to Message Media at <https://hub.messagemedia.com/login>
2. On the left-hand side, expand the Configuration menu option
3. Click on API Settings
4. This will bring you to <https://hub.messagemedia.com/api-settings> (1 in the picture below)



5. Click “Create new key” in the Basic Authentication section (2 in the picture above)
6. Enter a label as desired (e.g. Campus Café)
7. Click Create key
8. Message Media will generate a both an api\_key and an api\_secret. Copy these as once you close the window you will no longer have access to these values
9. Log in to Campus Café
10. Navigate to the Main Menu → Admin → Web App Config
11. In the search box, enter SMS.

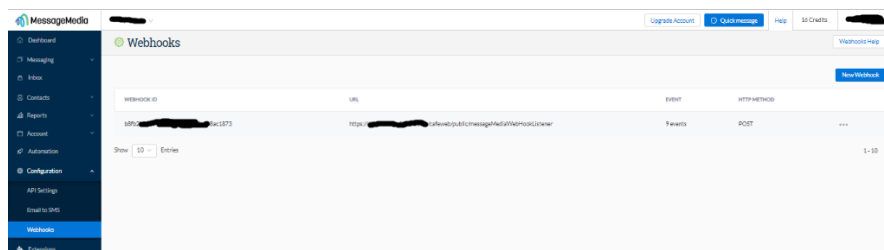
12. Double click in the Value box of MESSAGE\_MEDIA\_SMS\_API\_KEY and paste the api\_key
13. Double click in the Value box of MESSAGE\_MEDIA\_SMS\_API\_PASSWORD and paste the api\_secret into MESSAGE\_MEDIA\_SMS\_ID\_FOR\_PAST\_DUE\_FROM\_VAL and enter the Campus Café ID number of the default user to send scheduled text messages when a sender is not specified in the workflow
14. The setting will take effect the next time the cache is cleared. You can force this by navigating to Admin → Admin Servlet → reload data

## Option 2: Two-way texting with one Message Media phone number/account

Follow these directions if your institution has a single phone number through Message Media and all text messages come from that number. You can have multiple users in Message Media.

For two-way texting to work, you need to set up a webhook in Campus Café that will receive notifications from Message Media.

1. Complete steps 1-14 under Option 1
2. Log in to Message Media at <https://hub.messagemedia.com/login>
3. Confirm that you do not yet have a webhook set up by going to <https://hub.messagemedia.com/webhooks>
4. Log in to Campus Café
5. Navigate to Admin → Custom Control Maintenance
6. The URL in your browser should look similar to <https://xxx-web.scansoftware.com/cafeweb/XXXXX>
7. Replace everything after the cafeweb/ with `tapestry?service=external/MessageMediaWebHookCreationPage` so the URL looks similar to <https://xxx-web.scansoftware.com/cafeweb/tapestry?service=external/MessageMediaWebHookCreationPage>
8. On this page you will see an Id Number field and a Submit button. If your Message Media account only has one user (a global account for the entire school) enter 0 in the id number field. Press the submit button and the webhook should be automatically created. A message will appear below to show if the process succeeded or failed.
9. Go to <https://hub.messagemedia.com/webhooks> to ensure the webhook is there. You should see 1 record with a url ending with `/cafeweb/public/messageMediaWebHookListener` like in the following image:



## Option 3: Two-way texting with multiple Message Media phone numbers/accounts

If your Message Media account has multiple users each with his or her own phone number, each user can be linked to a specific Campus Café account in order to have the text message come from the correct phone number. Each individual user has their own API Key and API Password. To set that information to a specific user in Campus Café:

1. Complete steps 1-14 under Option 1
2. In Campus Café, navigate to Admin → Permission Maintenance
3. On the Permission Maintenance screen, look up a user in the Lookup Person box and then click Add/Edit

### Permission Maintenance

Information that is red is required

ADMIN : Administrative group with some desired restrictions ADMISSFAC : Admissions guy and he is also a faculty ADMISSION : admission ADVISOR : Advising Office Group ALL : All modules and SY administration ALUM/DEV : Alumni/Development APPLICANT : Applicant Group FACULTY : Faculty PARENT : Parents PLACECCOUN : Placement Counselor PLACEDIR : Placement Director REGISTRAR : Registrar's Office Group STUPIN : Student Financials WEBDEFAULT: THE DEFAULT PERMISSION GROUP FOR ALL WEB USERS	69: Admissions 70: Registration 71: Alumni/Development 72: Faculty 73: Student Financials 74: General Ledger 75: Accounts Payable 76: Continuing Ed 77: Housing 78: Health 79: Extension Studies Module 89: Graduate Admissions 90: Transcript Member Document Tracking 91: Career Services 92: System Admin
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Buttons: Add Group, Edit Group, Delete Group, Add, Remove, Edit Group Permissions, View All Permissions

Lookup Person:  Add/Edit

Copy Permission Group: -- choose one -- Copy From Group: Copy To Group: New Group Description: Copy Group

4. On the next screen, enter that user's Message Media API Key and password at the bottom

### User Permission Maintenance

Charles (Chuck) Mingus (660088110)

Information that is red is required

Permission Group:  
Username:  
Password:  
Maintenance Password:  
Validation 1:  
Validation 2:  
Image Path:  
Account Disabled:  
Require Password Change:  
User Id:  
User Name:

5. For each user that has their own API information, a webhook must be set up if using two-way texting.

6. Log in to Message Media at <https://hub.messagemedia.com/login>
7. Confirm that you do not yet have a webhook set up by going to <https://hub.messagemedia.com/webhooks>
8. Log in to Campus Café
9. Navigate to Admin → Custom Control Maintenance
10. The URL in your browser should look similar to <https://xxx-web.scansoftware.com/cafeweb/XXXXX>
11. Replace everything after the cafeweb/ with `tapestry?service=external/MessageMediaWebHookCreationPage` so the URL looks similar to <https://xxx-web.scansoftware.com/cafeweb/tapestry?service=external/MessageMediaWebHookCreationPage>
12. In the Id Number box enter 0. This will create the default, fallback account for Campus Café users who text who do not have a Message Media account.
13. Click Submit
14. On the setup page, enter the Campus Café user ID number for each Campus Café user with an individual Message Media account. Campus Café will first check if the user has his or her own API information stored and, if so, create a webhook for them. If no individual API account information exists, it will fail.

Now when a text is sent, Campus Café will determine which Message Media account the text should come from. First, the program checks to see if the user has his or her own API information. If it does, it connects to Message Media using that information and sends the text using that Message Media user. This makes it look like the text is coming from the phone number listed in that person's Message Media user. If the user does not have his or her own API information, it uses the values in Web App Config and sends the text after connecting to Message Media using those values.

## Reply Technical Explanation

When a person replies to a text message it goes to Message Media, which sends it to Campus Café via a webhook with the metadata we assigned to it. Using that, Campus Café looks up the tracking item that was added when the message was originally sent to the person. The system will filter out all the quotation marks in the response and replace them with apostrophes. Campus Café then appends the response to the long comment of that record, also adding who responded and when. Campus Café also sets the completed date and update the record (with id of TXTRESPOND).

Next, Campus Café looks up the email address of the person who sent the original text. This email address receives an email notifying them that the person has texted them back. The body of the email contains the person's response.

Each additional response to the original text appends to the long comment of the same tracking item. An email is sent each time.

## Texting Logic Control

By default, the system will text any individual with a mobile phone number regardless of whether the Text Allowed box is checked on the Bios page.

To set the system to respect the checkbox, complete the following:

1. Navigate to Admin → Custom Control Maintenance
2. In the Prog ID box enter “TEXTOPTIN”
3. In the Seq# box enter “1”
4. Click Submit. The parameter TEXTOPTIN should appear as the only result.
5. Click the pencil icon
6. In the Parameter Value 1 box enter “Y”
7. Click Save and Back
8. The setting will take effect the next time the cache is cleared for the parameter values.  
You can force this by navigating to Admin → Admin Servlet → reload data



# Establishing Workflows and Templates

A workflow and activity tracking template must be created to initiate and track a message.

Campus Café supports two options; one or both may be employed.

- A generic workflow/template combination for ad hoc messages where the content may vary or be pre-filled
- A workflow/template combination with a pre-filled message scheduled to send based on a non-completed activity

## Workflow Type and Category

Although not required, Campus Café recommends creating a workflow type and category to distinguish text messages from other activities.

A type (e.g. “text”) can be added via STParm SYWFTY

A category (e.g. “text”) can be added via STParm AFREAD

After adding STParms, the Admin Servlet must be run.

## Create Workflow and Activity

Each text must be associated with an activity tracking template.

The template can be generic, e.g. “text,” to hold any ad hoc message or the template can be created to hold a boilerplate message. Users may select the template with the boilerplate message and the message will be pre-filled though users may edit the message before sending. Or the boilerplate message can be used as part of a workflow process such as a marketing drip campaign.

## **Ad hoc Workflow and Activity**

### **Create Workflow**

1. Navigate to All Users → Workflow Definitions
2. In the Member box, choose a member to associate the text with
3. In the Definition name box, enter a name of the workflow
4. Click Add
5. In the Type box, choose a desired type
6. In the Category box, choose the desired category
7. In the Description box, enter a description
8. In the Mode choose Text Message Prefilled When Sending Text
9. Under Options, leave all checkboxes unchecked
10. Under Actions, optionally choose whether to assign the user who initiates the text as the person assigned to the task.
11. Under Actions, optionally choose whether to mark the text as a completed item upon send.
12. Since the email and text processes are mutually exclusive, under Actions checking email tracked person or email advisor is not supported. If an email is to be sent simultaneously, create a separate workflow. The text workflow and email workflow may be combined under one activity template.
13. In the Text box, enter the text to automatically appear when the template is selected. To have no text appear, leave this box blank. Merge fields are *not* supported in pre-filled texts.
14. Click Save

### **Create Activity**

1. Navigate to All Users → Activity Tracking Templates
2. In the Member box, choose the member associated with the workflow previously created
3. In the Template Name box enter a name for the template
4. Click Add
5. In the Description box, describe the template
6. In the Work Flow Name box, select the workflow previously created
7. Click Save

## Scheduled Workflow and Activity

1. Navigate to All Users → Workflow Definitions
2. In the Member box, choose a member to associate the text with
3. In the Definition name box, enter a name of the workflow
4. Click Add
5. In the Type box, choose a desired type
6. In the Category box, choose the desired category
7. In the Description box, enter a description
8. In the Mode choose Text Messages Sent on Past Due Job
9. Under Options, leave all checkboxes unchecked
10. Under Actions, optionally choose whether to assign the user who initiates the text as the person assigned to the task.
11. Since the email and text processes are mutually exclusive, under Actions checking email tracked person or email advisor is not supported. If an email is to be sent simultaneously, create a separate workflow. The text workflow and email workflow may be combined under one activity template.
12. Under Actions, do *not* check Mark Completed. The system will only search for non-completed workflows to send at the next job time and, once the message is initiated, will mark the workflow as complete automatically.
13. Under Text

**Text Will be Sent from Person:** User which will send the message and receive an email with any replies. If the user has no Message Media API associated with account, the sender will default to the sender in the Web App Config settings. The first, far left, box holds the sender Campus Café ID number. The second box displays the name. Use the Lookup by Name link to quickly locate a Campus Café user.

**Time to Send:** Enter the time (Eastern Standard Time) the message will be sent. Sending at 12:00AM Eastern Time exactly is not supported. The message will be sent the first time that scheduled time arrives after the scheduled job runs. If the time is blank, the message will send the next time the job is run.

*Note:* Configuration in Message Media can be set to hold messages sent between certain hours. The messages will go out when those hours end.

**Text Message:** The content of the text message. Optionally, use the double arrows to insert a merge tag such as the recipient's first name.

14. Under Valid Progress Codes For Past-Due Jobs & MS Word Merges

Selecting one progress code will limit the recipients to only those with that admission progress code.

Selecting multiple progress codes will send the message to individuals with any of the admission progress codes specified.

Leaving *all* progress codes blank will send the message to all individuals with the activity regardless of progress code.

## **Create Activity**

1. Navigate to All Users → Activity Tracking Templates
2. In the Member box, choose the member associated with the workflow previously created
3. In the Template Name box enter a name for the template
4. Click Add
5. In the Description box, describe the template
6. In the Work Flow Name box, select the workflow previously created
7. Click Save

## **Assign Activity**

Campus Café will send the text message defined in the workflow to any individual assigned the activity where the activity completed date is null. The activity may be assigned to individuals individually through activity tracking, through a finder or through an admissions application.

## **Scheduled Job Launch**

At the customer's request, Campus Café will set up a regularly scheduled job to evaluate all non-completed text message workflows and cue them for sending at their scheduled times provided the due date is not in the future. The next scheduled job time may be viewed by navigating to Main Menu → Admin → Job Management. Locate Past Due Email & Text Templates Job.

The job may be launched manually by clicking [Click Here to Send Past Due Email Templates Manually](#).

## Record Explicit Consent to Receive Text

Under the U.S. Telephone Consumer Protection Act (TCPA), customers must give businesses “express written consent” to send them texts. Campus Café may be utilized to record this consent and, if configured as such, will only send to individuals with consent recorded.

1. Navigate to the Person
2. Navigate to Main Menu → Person Selected → Bios
3. Next to Text Allowed, check the box
4. Click Save

To gather this consent early in the contact process, this box may also be added to an inquiry or application. The field is called Text Opt In.

## Send Ad Hoc Text Message

### Sender Permissions Required

- 1092 under the global module
- User must have access to the activity tracking member

### Prerequisites

- The person receiving the text message must have a mobile (MBL) phone set up on the address/phones page.
- If Custom Control has been set to respect the text allowed box on the person Bios page, the box must be checked.

### Send a Text

1. Navigate to any People Finder (student, faculty, etc.) or Course Roster
2. If using a finder, set filters to return the desired population to text
3. Select, using the checkboxes, the people to text
4. Click the text button and choose text all to text all selected or text page to text just those on the specific page of results
5. To the right of the Member:Template Name\*: box, click the magnifying glass
6. In the lookup list, click Select to the left of the activity with the desired Template Name  
Tip: Use the text box in the upper right and search for your template name
7. You can optionally tie the message to a specific semester. This might be useful if you are asking about a specific class in a specific semester or financial aid for a specific semester.
8. Optionally add a comment that will not be part of the text message
9. Optionally assign a user responsible for this activity (text)

10. In the Add Only For These People box choose whether to send the message to everyone selected, only those that do not have the activity tracking item or only those that do not have the item for the set semester.
11. If the activity has boilerplate text associate with it, the text will appear in the message box. You can modify this message. If there is no boilerplate associated with the activity, type the message in the box
12. Click submit
13. Confirm the desire to text
14. The process goes through each person individually
  - a. It ensures the person has the correct permissions to add the selected tracking record.
  - b. If Custom Control has been set to respect the text allowed box on the person Bios page, the process ensures texting is allowed.
  - c. The process ensures the person has a mobile phone number.
  - d. The process checks to see if the person has that tracking item already (if set on the drop down).
  - e. Finally, if that all succeeds, it adds the tracking record and the text message is sent added as the long comment. Otherwise, errors appear below, or the user is emailed.

The process uses the data from the tracking record as metadata so Message Media can keep track of any responses.

## Replies

When a person replies, the reply is appended to the long comment of the tracking item initially used to send the text. An email containing the reply is sent to the user who sent the text.