

Help Center

Just a click away!



LiveMessage

e-book

ChildPlus
Desktop



800.888.6674
childplus.com

© 2022 Management Information Technology USA, Inc. DBA ChildPlus Software. ChildPlus is a trademark of Management Information Technology USA, Inc.

Information in this document is subject to change without notice. Companies, names and data used in examples herein are fictitious unless otherwise noted.

The Help Center and Agency Customization

The articles in the Help Center and videos in the Learning Library are based on the default setup of ChildPlus and assume full security access to all platforms, modules, features and fields. If you cannot find or access a feature referenced in an article, be aware that your agency's specific customization of ChildPlus determines:

- Your access to each platform
- Your access to specific modules or features
- Security or location restrictions for your level of access to ChildPlus
- Whether a module or feature has been turned on
- Which fields are available in each module
- The content of drop-down fields

Contact your ChildPlus administrator to verify your security access and the availability of a feature referenced in an article.

If you are a ChildPlus administrator and need to configure security access or turn on a feature, see [User Security Groups](#) or [contact us](#) for additional assistance.

Help Center Updates and ChildPlus Platforms

The Help Center is continually updated to reflect the current version of ChildPlus. Ensure that you are using the [latest version of ChildPlus](#) and referencing an article for the appropriate ChildPlus platform. Instructions for modules often differ between ChildPlus Online and ChildPlus Desktop and are unique for the Attendance App.

- To find out which version of ChildPlus you are using, see [About ChildPlus](#).
- For more information about the different platforms and how to access them, see [Platform Comparison](#).
- To learn about the differences between the modules in ChildPlus Desktop and ChildPlus Online, see [Module Comparison](#).

Table of Contents

LiveMessage	5
Configure a New LiveMessage	6
Compose a New LiveMessage	8
Format a LiveMessage	9
Add Database Fields to a LiveMessage	10
Add a Custom Filter to a LiveMessage	10
Configure Email/Text Message Settings	11
Run a LiveMessage	13
View a Letter	13
Send an Email	14
Send a Text Message	15
Verify Recipient Contact Information	16
Delete a LiveMessage	17

LiveMessage

LiveMessage provides a way to create custom letters, emails and text messages. You can send emails and text messages directly from ChildPlus to parents/guardians, staff members, volunteers and professional development trainees with valid email addresses and cell phone numbers.

Configure a New LiveMessage

Use this section to configure the general settings for a new **LiveMessage**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveMessage**.
2. Click **Add New LiveMessage**.
3. Select one of the following:
 - **Start with a blank message**: create a new **LiveMessage** from scratch
 - **Start with a copy of**: copy all settings from an existing **LiveMessage**



Sample **LiveMessages** cannot be edited. Select this option if you want to customize a sample **LiveMessage**.

4. Click **OK**.
5. Complete the **fields**.

Field	Description
Number	Enter a number to assign to the LiveMessage . This number can contain up to six alphanumeric characters
Name	Enter a name to assign to the LiveMessage
 Category	Select a category. Categories are used to group similar LiveMessages and are based on the service areas in ChildPlus
Description	Enter a description for the LiveMessage . ChildPlus displays this description at the bottom of the Reports window when you hover over the report name
This LiveMessage will be used to send	Select the type of correspondence the LiveMessage will be used to send: <ul style="list-style-type: none">• Printed Letters• Email or Text Messages
Base this Message on	Select the area of ChildPlus to base the LiveMessage on. Your selection determines which database fields will be available for you to add to the LiveMessage
Select a specific type of information	Select the data type to base the LiveMessage on. Your selection determines which database fields will be available for you to add to the LiveMessage This field is only available for Printed Letters

Field	Description
Select the Security Groups that are permitted to run this message	Select the Security Group(s) that you want to be able to run the LiveMessage We recommend that you initially only grant the Admin group access to the LiveMessage . Once you are ready for other users in your organization to access and run the LiveMessage , you can grant access to additional Security Groups



ChildPlus administrators can configure the settings for this field in **ChildPlus Desktop >> Setup >> System Setup >> [Customize Dropdown Choices](#)**.

6. Do one of the following:
 - Click **Save** to stop configuring the **LiveMessage** and return to it at a later time
 - Click **Next Step** to compose the **LiveMessage**

Compose a New LiveMessage

Once you have configured the general settings for a **LiveMessage**, you can enter your message in the **LiveMessage** text editor. The **LiveMessage** text editor works similar to other word processing programs, such as Microsoft Word or Google Docs.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveMessage**.
2. Select the **LiveMessage** that you want to work with. If you have already configured the general settings, ChildPlus will automatically open the **LiveMessage** text editor.
3. Enter your message.



You can also copy and paste the message from another application into the text editor.

4. Complete the following tasks as needed:
 - [Format the message](#)
 - [Add database fields](#)
 - [Apply custom filters](#)
 - [Configure Email/Text Message Settings](#)
5. Click **Save**.



ChildPlus only supports left-to-right languages in **LiveMessage**.

Format a LiveMessage

Use this section to apply formatting to a **LiveMessage**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveMessage**.
2. Select the **LiveMessage** that you want to work with.
3. Use the **options** on the toolbar to format the message.

Option	Description
Home	Format the content of the LiveMessage
Insert	Insert tables, images, links, text boxes or special characters into the LiveMessage Images only display on letters and can be resized in the text editor Images cannot be sent via email or text message. If you insert an image into an email or text message, it will only display when you print the LiveMessage
Page Layout	Adjust the page margins, orientation and page size
View	Zoom in or out of the text editor

4. Click **Save**.

Add Database Fields to a LiveMessage

Customize a **LiveMessage** for each recipient using database fields. Database fields are placeholders that allow you to send a **LiveMessage** to multiple recipients without having to specify each individual's information.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveMessage**.
2. Select the **LiveMessage** that you want to work with.
3. Click **Database Fields** to display the list of database fields in the right sidebar.
4. Place the cursor where you want to insert a database field in the text editor.
5. Click **Expand +** next to the group of fields that contains the database field that you want to add.
6. Select a database field.
7. Do one of the following to insert the field:
 - Double-click the field
 - Click **Insert**
 - Drag and drop the field where needed



When you insert a database field into the text editor, ChildPlus displays brackets around the field name.

8. Repeat steps 4-7 for each database field that you want to add.
9. Click **Save**.

Add a Custom Filter to a LiveMessage

Use this section to add a custom filter to a **LiveMessage**. When you add a custom filter through the **LiveMessage** setup window, it cannot be modified or removed when a user runs the **LiveMessage** from the **Reports** module. Only users with the appropriate security privileges can remove a custom filter from the **LiveMessage** setup window.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveMessage**.
2. Select the **LiveMessage** that you want to work with.
3. Click **Custom Filters**.
4. Select the custom filter(s) that you want to add.
5. Click **OK**.
6. Click **Save**.



For more information about custom filters, see [Custom Filters](#).

Configure Email/Text Message Settings

Use this section to specify defaults for **LiveMessages** that will be sent as emails or text messages.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveMessage**.
2. Select the **LiveMessage** that you want to work with.
3. Click **Email/Text Message Settings**.
4. Complete the **fields**.

Field	Description
Send Via	Select the format that the LiveMessage will be sent in
To	Select who will receive the LiveMessage The options in this field are based on your selection in the Base this Message on field on the LiveMessage setup window
Cc	Enter the email address(es) to send a copy of the email to. Any email addresses entered in this field will be displayed to all recipients
Bcc	Enter the email address(es) to send a copy of the email to. Any email addresses entered in this field will not be displayed to any recipients
Reply-To	Enter an email address if you want the individual(s) receiving the message to be able to respond. ChildPlus displays a warning message if you leave the field empty
Subject	Enter a subject for the message. If you do not enter a subject, you must select Allow sender to override so that users can enter a subject
Allow sender to edit message body	Select this option to allow users to edit the message
 Log each time this message is sent in the Family Services Communication Log event	Select this option to log each message sent to participants as an Action in the Family Services Communication Log Event When this option is selected, ChildPlus displays the following on the Send Message window: This message will be logged in Family Services under the Communication Log event using the information below
Description	Enter a description for the Action in the Communication Log Event

Field	Description
Agency Worker	Select the staff member for the Action in the Communication Log Event
Total Time	Enter the total time in hours and minutes for the Action in the Communication Log Event
Allow sender to override	Select this option next to each field that you want to allow users to modify



Run **Report 4130 - Family Service Actions** to view **LiveMessages** that have already been sent to family members.

5. Click **Save**.

Run a LiveMessage

You can run a **LiveMessage** through the **LiveMessage** module, through the **Reports** module or through **Services** modules for individual participants.

View a Letter

Use this section to view a letter in **LiveMessage**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveMessage**.
2. Select the **LiveMessage** that you want to view.
3. Click **Preview**. ChildPlus opens the report setup window for the **LiveMessage** in **Reports**.
4. Select an option for each applicable filter.
5. Do one of the following:
 - Click **Preview** to display the **LiveMessage**
 - Click **Print** to send the **LiveMessage** directly to your printer



You can also run a **LiveMessage** through **ChildPlus Desktop >> Reports >> Send Email/Text/Letter**. For more information, see [Run a Report](#).

Send an Email

Use this section to send an email through **LiveMessage**. Message recipients must have an [email address](#) in ChildPlus to receive a **LiveMessage**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveMessage**.
2. Select the **LiveMessage** that you want to send.
3. Click **Preview**. ChildPlus opens the report setup window for the **LiveMessage** in **Reports**.
4. Select an option for each applicable filter.
5. Click **Preview Email/Text Message**.
6. Modify any of the available fields as needed.
7. Click **Add Attachment** to add an attachment if applicable.
8. Click **View Individuals**.
9. Review the list to determine which individuals do not have an email address entered into ChildPlus. These individuals will not receive your program's email.
10. Click **Close**.
11. Do one of the following:
 - Click **Send a Test Message** to send a preview message to yourself and verify the format and content of the message before sending to recipients
 - Click **Send Message** to send the message to recipients
12. Click **OK** to dismiss the **Reply-To** message if you want to leave this field empty.
13. Click **OK** to dismiss the attachments message if you do not want to add an attachment.
14. Click **OK** to confirm that you want to send the email. ChildPlus displays a list of recipients who did not receive the email and the reason why.
15. If applicable, click **Print paper letters for these individuals** to open another instance of the **LiveMessage** with the print feature enabled.
16. Click **Close**.



To send a message directly to an adult family member, go to **ChildPlus Desktop >> Services >> Select any module** and click **Send Message**.

You can also run a **LiveMessage** through **ChildPlus Desktop >> Reports >> Send Email/Text/Letter**. For more information, see [Run a Report](#).

Send a Text Message

Use this section to send a text message through **LiveMessage**. Message recipients must be [opted-in](#) to receive text messages from ChildPlus to receive a **LiveMessage**.



Standard text message and data rates may apply. Text messages sent from ChildPlus may also count towards the messaging limits of recipients' cell phone plans.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveMessage**.
2. Select the **LiveMessage** that you want to send.
3. Click **Preview**. ChildPlus opens the report setup window for the **LiveMessage** in **Reports**.
4. Select an option for each applicable filter.
5. Click **Preview Email/Text Message**.
6. Modify any of the available fields as needed.



Each recipient's cell phone carrier controls whether they can reply to text messages sent through ChildPlus. In addition, long text messages may be cut off or sent as multiple messages if the recipient's cell phone carrier limits the character length of messages.

7. Click **View Individuals**.
8. Review the list to determine which individuals either do not have a cell phone number entered into ChildPlus or who have not opted in to receive text messages from ChildPlus. These individuals will not receive your program's text message.
9. Click **Close**.
10. Do one of the following:
 - Click **Send a Test Message** to send a preview message to yourself and verify the format and content of the message before sending to recipients
 - Click **Send Message** to send the message to recipients
11. Click **OK** to dismiss the **Reply-To** message, as the **Reply-To** function is not applicable for text messages.
12. Click **OK** to confirm that you want to send the text message. ChildPlus displays a list of recipients who did not receive the text message and the reason why.
13. If applicable, click **Print paper letters for these individuals** to open another instance of the **LiveMessage** with the print feature enabled.
14. Click **Close**.



To send a message directly to an adult family member, go to **ChildPlus Desktop >> Services >> Select any module** and click **Send Message**.

You can also run a **LiveMessage** through **ChildPlus Desktop >> Reports >> Send Email/Text/Letter**. For more information, see [Run a Report](#).

Verify Recipient Contact Information

Verify cell phone numbers, opt-in statuses and email addresses for **LiveMessage** recipients before sending a message.

[ChildPlus Desktop](#)

Use the following table to learn where you can verify contact information for each type of recipient in ChildPlus Desktop.

Recipient	Module
Family Member	Services >> Application >> Family Members (Adult Only) >> Email and Phone Numbers
In-Kind Volunteer	Management >> In-Kind >> Volunteer Information >> Address
Staff Member	Management >> Personnel >> General >> Address and Contact

Delete a LiveMessage

Use this section to delete a **LiveMessage**.

1. Go to **ChildPlus Desktop >> Module Setup >> LiveMessage**.
2. Select the **LiveMessage** that you want to delete.
3. Click **Delete LiveMessage**.
4. Click **Yes** to confirm that you want to delete the **LiveMessage**.