



modern[®] campus

Engaging Modern Learners
For Life

Introduce yourself in the chat! With which institution are you affiliated?

Smart Send

Schedule messages with the most up-to-date data with Smart Send!

Smart Send

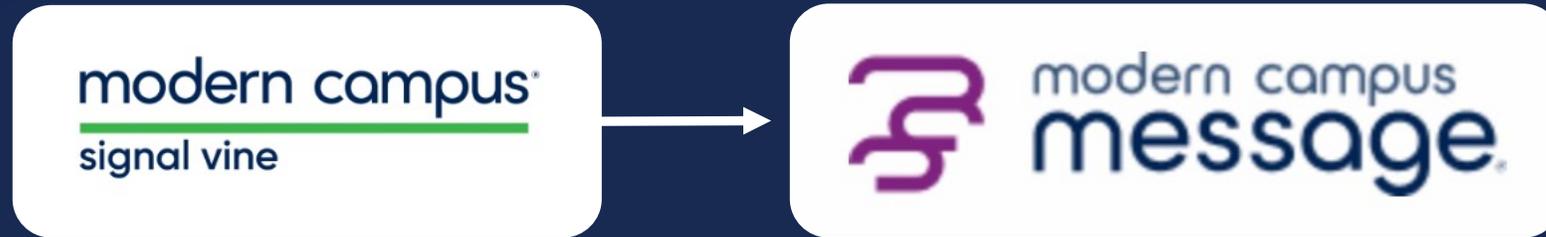
Schedule messages with the most
up-to-date data with Smart Send!

Agenda

1. What is Smart Send?
2. Smart Send vs. Current Matches
3. How to use Smart Send
4. Troubleshooting
5. Q&A
6. Close



What is Message?



What is Smart Send?

Smart Send

- Set search criteria for a **future message**
- Advanced search at the time of **send** not the time of **search**

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New Message

✕

Send from:

Advising
▼

Send to: 48 contacts [clear criteria](#) Query results as of Apr 1, 2024, 11:42:43 AM

Program is Advising

Group(s) Meredith

Message:

Scheduled for immediate delivery

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

Next

Match: Smart Send Current Matches

Trust Your Data, Trust Your Send!

- Set TODAY
- Search DAY OF SEND
- Only contacts who meet criteria of DAY OF SEND will get the message!



Smart Send



Smart Send vs. Current Matches

Current Matches

*Message sends to all contacts who meet the criteria **TODAY**.*

Smart Send

*Message sends to all contacts who meet the criteria at the **FUTURE DATE**.*

Search Criteria: Scheduling a message for next month to all contacts with `current_city = Boston`

- Anthony is currently in Boston.
- Next week, Anthony lets us know he moved to New York.

Current Matches

*Message sends to all contacts who meet the criteria **TODAY**.*

Smart Send

*Message sends to all contacts who meet the criteria at the **FUTURE DATE**.*

More Actions | New Message

Additional criteria

current_city equals Boston

+ Add Criteria

Cancel Search

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Schedule Date

Today, April 3

Anthony is in Boston and meets the criteria

Anthony Moves

April 10



Data Update

Send Date

May 3

Anthony is in New York and **does not** meet the criteria

Current Matches

- *Message sends to all contacts who meet the criteria **TODAY**.*
- *Anthony receives the message, even though he is no longer in Boston.*

Smart Send

- *Message sends to all contacts who meet the criteria at the **FUTURE DATE**.*
- *Anthony does not receive the message, because he is no longer in Boston.*

Current Matches

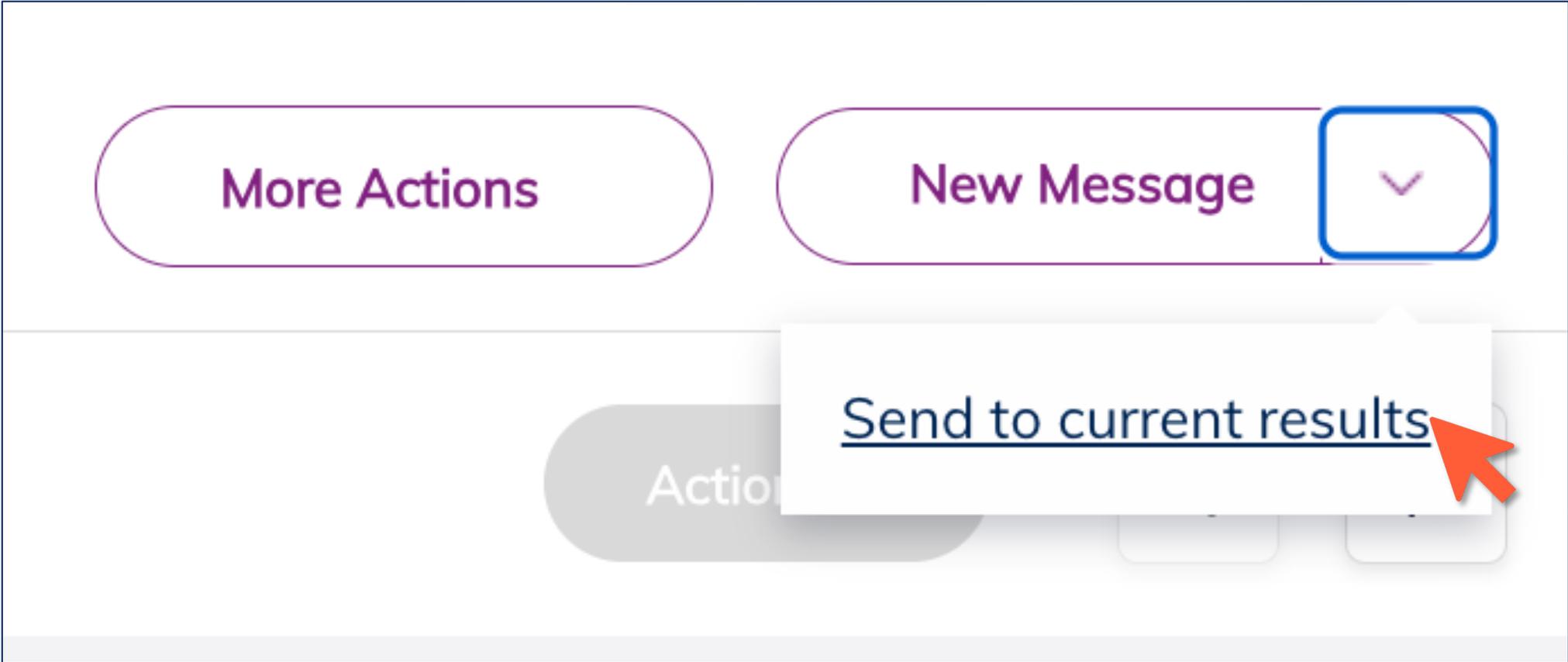
- *Message sends to all contacts who meet the criteria **TODAY**.*
- *Anthony receives the message, even though he is no longer in Boston.*

Smart Send



- *Message sends to all contacts who meet the criteria at the **FUTURE DATE**.*
- *Anthony does not receive the message, because he is no longer in Boston.*

How to use Smart Send



Using Advanced Search

1. Click “Advanced Search”
2. Set your criteria
3. “Search”

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The screenshot displays the 'modern campus message' interface. At the top, there is a purple header with the logo and the text 'modern campus message'. To the right of the header, the words 'Messages' and 'C' are visible. Below the header, there is a search section with the title 'SEARCH'. It features a search input field with the placeholder text 'Search contacts' and a magnifying glass icon. Below the search field, there is a link labeled 'advanced search' with a red arrow pointing to it. Underneath the search section, there is a 'PROGRAMS' filter section. It includes a list of programs: 'Admissions' (unchecked) and 'Advising' (checked). To the right of the programs list, there are links for 'ALL' and 'NONE'. Below the programs list, there are more links for 'ALL' and 'NONE'. On the right side of the interface, there is a 'Contacts (48)' section. It has a table with columns for 'ACTIVE' and 'LAST NAME'. The first row in the table shows a contact with the last name 'Acosta' and a blue dot in the 'ACTIVE' column.

4. High the dropdown arrow
5. Click “Send to Current Results”

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The screenshot displays the Modern Campus Message interface. The top navigation bar includes the logo and menu items: Messages, Contacts, Programs, Analytics, Implementation HE, a settings gear icon, a calendar icon, and a help icon. The main content area is divided into a left sidebar and a central workspace. The sidebar contains a search section with a search bar, a filter 'active equals true', and a 'FOLDERS' section. The central workspace shows an 'Inbox' tab with a table of messages. The first message is from 'Alfonso Larson' dated '10/30/20' with the subject 'ADVISING' and a recipient 'Lauss'. A 'New Message' button with a dropdown arrow is located in the top right of the workspace. A dropdown menu is open, showing the option 'Send to current results', which is highlighted by an orange arrow. Another orange arrow points to the dropdown arrow on the 'New Message' button.

modern campus message

Messages Contacts Programs Analytics Implementation HE

SEARCH

Search me

active equals true

[add or edit criteria](#)

[clear all](#)

FOLDERS

Inbox Exports

New Message

Send to current results

Sort by Newest

Alfonso Larson

10/30/20

ADVISING

Lauss

6. Write your message
7. Select “Future Date”
8. Keep “Smart Send” selected
9. Click next

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New Message ✕

Send to: 239 matching contacts (as of July 6, 2022 at 11:00 a.m.) [clear criteria](#)

Program is Academic Advising
AND active equals true
AND group_list contains New Participants

Advanced Search results.

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: Now Future Date Delivery starts 1/1/2023 at 2:15 p.m.

Match: Smart Send Current Matches

Next

10. Confirm your message

11. Click “Send”!

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Confirm new message [Close]

Send to: Smart Send (239 currently matching contacts)
Program is Academic Advising
AND active equals true
AND group_list contains New Participants

Message:

[Profile Icon] First Name, make sure you schedule your co-op interviews!

[Profile Icon] Let me know if I can help you in any way.

Delivery Starts: Tuesday, March 4th at 2:36 p.m.
Delivery Complete: Tuesday, March 4th at 2:36 p.m.

[Back to edit message](#) **Send**

Using “Send to Current Results”

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The screenshot shows the Modern Campus Message interface. The top navigation bar includes 'Messages', 'Contacts', 'Programs', 'Analytics', 'Implementation Alumni', and utility icons. The left sidebar contains a search bar and a 'PROGRAMS' filter section with 'Alumni Relations' selected and various years (2006, 2008, 2015) and locations (Baltimore, Boston, DC) listed. The main content area displays a 'Contacts (48)' list with columns for 'ACTIVE', 'LAST NAME', 'FIRST NAME', 'LAST OUTBOUND', and 'LAST INBOUND'. A 'More Actions' button is visible, and a tooltip for 'Send to current results' is shown over the 'Action' column header.

ACTIVE	LAST NAME	FIRST NAME	LAST OUTBOUND	LAST INBOUND
<input type="checkbox"/>	Abbott	Darin	Apr 8, 2022, 1:36:18 PM	Sep 16, 2020, 7:35:29 ...
<input type="checkbox"/>	Alyssa	Willie	Mar 7, 2024, 3:56:44 PM	never
<input type="checkbox"/>	Andrew	Lewis	Mar 7, 2024, 4:19:01 PM	never
<input type="checkbox"/>	Arnold	Alma	Aug 31, 2023, 1:01:45 ...	never
<input type="checkbox"/>	Austin	Ana	Aug 31, 2023, 4:00:35 ...	never
<input type="checkbox"/>	Ball	Jamie	Aug 31, 2023, 1:01:18 ...	never

modern campus message

Messages **Contacts** Programs Analytics Implementation Alumni

SEARCH

Search contact: [input] [dropdown]

[advanced search](#)

PROGRAMS [ALL](#) | [NONE](#)

Alumni Relations

[ALL](#) | [NONE](#)

- 2006
- 2008
- 2010
- 2011
- 2015
- 2016
- 2017
- Baltimore
- Boston
- DC

Contacts (48)

More Actions New Message [dropdown]

[Send to current results](#)

<input type="checkbox"/>	ACTIVE	LAST NAME	FIRST NAME	LAST OUTBOUND	LAST INBOUND
<input type="checkbox"/>	●	Abbott	Darin	Apr 8, 2022, 1:36:18 PM	Sep 16, 2020, 7:35:29 ...
<input type="checkbox"/>	●	Willie	Willie	Mar 7, 2024, 3:56:44 PM	never
<input type="checkbox"/>	●	Andrew	Lewis	Mar 7, 2024, 4:19:01 PM	never
<input type="checkbox"/>	●	Arnold	Alma	Aug 31, 2023, 1:01:45 ...	never
<input type="checkbox"/>	●	Austin	Ana	Aug 31, 2023, 4:00:35 ...	never
<input type="checkbox"/>	●	Ball	Jamie	Aug 31, 2023, 1:01:18 ...	never

1. Contacts Tab

3. Dropdown Arrow

4. Sent to Current Results

2. Choose programs/groups



Smart Send



Current Matches



Examples

Old Way: Template New Way: Smart Send

<p>New Student Orientation_2</p>	<p>Morning of Freshman Orientation: 8/15/2024</p>	<p><u>New_student = TRUE</u> AND <u>Student_type = freshman</u> AND <u>registered_for_orientation = TRUE</u></p>	<p>Hi <u>[first_name]</u> or <u>[preferred_name]</u>, it's <u>[advisor_name]</u>. Looking forward to seeing you today at <u>[classification]</u> orientation. We have designed it just for <u>[classification]</u> --- plus <u>favorite professor</u> will be there to meet you! See you on <u>date/time</u> at <u>location</u></p>
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Old Way: Template New Way: Smart Send

Move In Day	8/25/24 @10am	Living on campus? = True	Hi [first_name], we're excited for move in day! Make sure you arrive between 8am and 2pm and check in at Haley Gate!
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Old Way: Template New Way: Smart Send

<p>First 2 Weeks Check In</p>	<p>Sep 15, 2024 @9am</p>	<p>Program = Advising</p>	<p>Hi [first_name], it's [advisor_name]. How have your first few weeks been here at CU? Let me know if there's anything I can do for you!</p>
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Trouble Shooting

User must be in the Contacts tab.

modern campus message

Messages **Contacts** Programs Analytics Customer Success 2019-2020

SEARCH

Search contacts

[advanced search](#)

More Actions New Message

Contacts (48)

<input type="checkbox"/>	ACTIVE	LAST NAME	FIRST NAME	LAST OUTBOUND	LAST INBOUND
<input type="checkbox"/>	●	Acosta	Nora	Jan 24, 2022, 11:00:03 ...	never
<input type="checkbox"/>	●	Ayala	Jocelynn	Feb 1, 2021, 11:36:04 ...	May 1, 2020, 3:25:15 PM
<input type="checkbox"/>	●	Bautista	Ian	May 14, 2021, 12:00:04...	never
<input type="checkbox"/>	●	Bray	Randall	Jan 24, 2022, 11:00:03 ...	May 1, 2020, 12:03:08 ...
<input type="checkbox"/>	●	Brooks	Immanuel	Jan 24, 2022, 11:00:06 ...	May 1, 2020, 3:25:16 PM

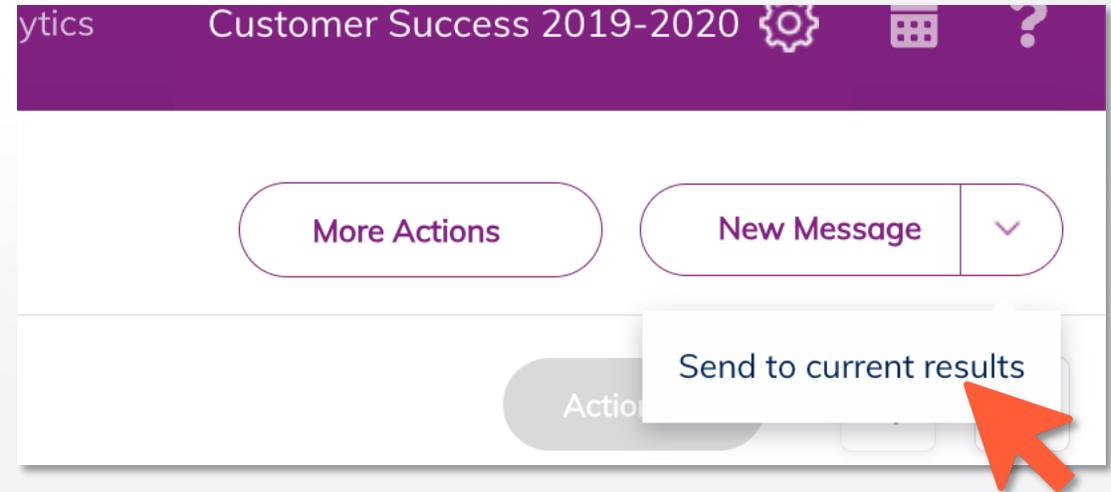
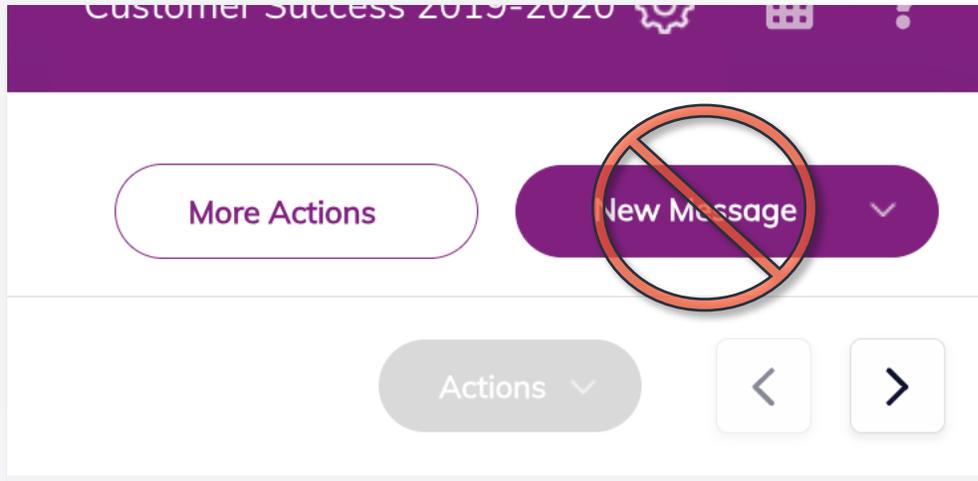
PROGRAMS [ALL](#) | [NONE](#)

- Admissions
- Advising
- [ALL](#) | [NONE](#)
- Anthony
- Emerson
- inactive
- Meredith
- Shane
- Alumni

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User must click the "send to current results" in the New Message dropdown.

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The delivery option must be set to Future.

Be Advised: mobile carriers shortened links from free service. More information is available.

Done

Delivery Date: ~~Now~~ Future Date

Match: Smart Send Current Matches

Next

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What will you put into
practice after this webinar?

Answer in the poll!

Q&A

Please put your questions in the Q&A box.
I'll get to as many as possible and follow up via
email if more research is needed!

Thank You

See you next month!