



modern[®] campus

Engaging Modern Learners
For Life

Introduce yourself in the chat! Which institution are you here with?

Campaign Messages

Send ad-hoc messages to large groups of contacts not grouped together in your Message data.

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Send ad-hoc messages to large groups of contacts not grouped together in your Message data.

Agenda

1. Intro
2. Examples
3. Set Up and Send
4. Quick Copy + Paste
5. Q&A
6. Close



Campaign Messages

When to use a Campaign Field Message

Ad Hoc Message

1,000+ Contacts

The segmenting data
isn't in Message

6

The screenshot shows the 'Advanced Search' dialog box. At the top, it says 'Match if All rules are met'. Below that, 'Rule #1' is defined with '(rename rule)' and '(delete rule)' links. The rule is configured with 'If All of the following conditions are met'. A single condition is shown: 'campaign' (selected from a dropdown) 'equals' (selected from a dropdown) '9.5.24FallAdmit'. A red 'X' icon is next to the value field. Below the condition, there are links for '+ add another condition' and '+ add another rule'. At the bottom right, there are 'Cancel' and 'Search' buttons.

If you want to...

- Save response data to a new field
- Have automation

7

... You will need to use the template!


Msg #	Date/Time	Condition	Content	Save Response
1	created_at + 10 mins	campaign = no_app_6.1 4.24	<p>Part 1: Hi [first_name]! This is [counselor_name], your Admissions Counselor from Signal Vine U. I'll send important info & reminders to help you through our admissions process. Are you still interested in applying to Signal Vine University?</p> <p>Response to Yes: Awesome, the application is due in 3 weeks!</p> <p>Response to No: Thanks for letting us know. If you need my help feel free to reach out!</p>	Save Yes/No response to interest_check

Avoid creating temporary “group lists”

- Creates a busy, long list of groups
- Could disrupt counselor access to groups
- Groups are designed for long term counselor access and messaging

8

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

Alumni Relations 

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

2006

2008

2010

2011

2015

2016


2017

Baltimore

Boston

DC

[all groups selected + 7 more groups \(17 groups selected\).](#)

Annual Giving 

“group_list” vs. “campaign” field

customer_id	group_list	campaign
SV-1	2015;Philadelphia	08.16.2024 meetup followup
SV-2	2017;NYC	08.16.2024 meetup followup
SV-17	2016;Philadelphia	08.16.2024 meetup followup
SV-18	2006;Baltimore	08.16.2024 meetup followup
SV-66	2016;Philadelphia	08.16.2024 meetup followup
SV-16	2017;NYC	08.16.2024 meetup followup
SV-36	2015;Boston	08.16.2024 meetup followup

Do you need a “campaign” field message?

- What data do you upload and currently have access to WITHIN Message?
- What are the groups you would like to send a message to?

10

☰	prior_donor	Maybe (Boolean)	prior_donor
☰	major	String	major
☰	email	String	email
☰	donation_amou...	String	donation_amou...

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

Alumni Relations

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

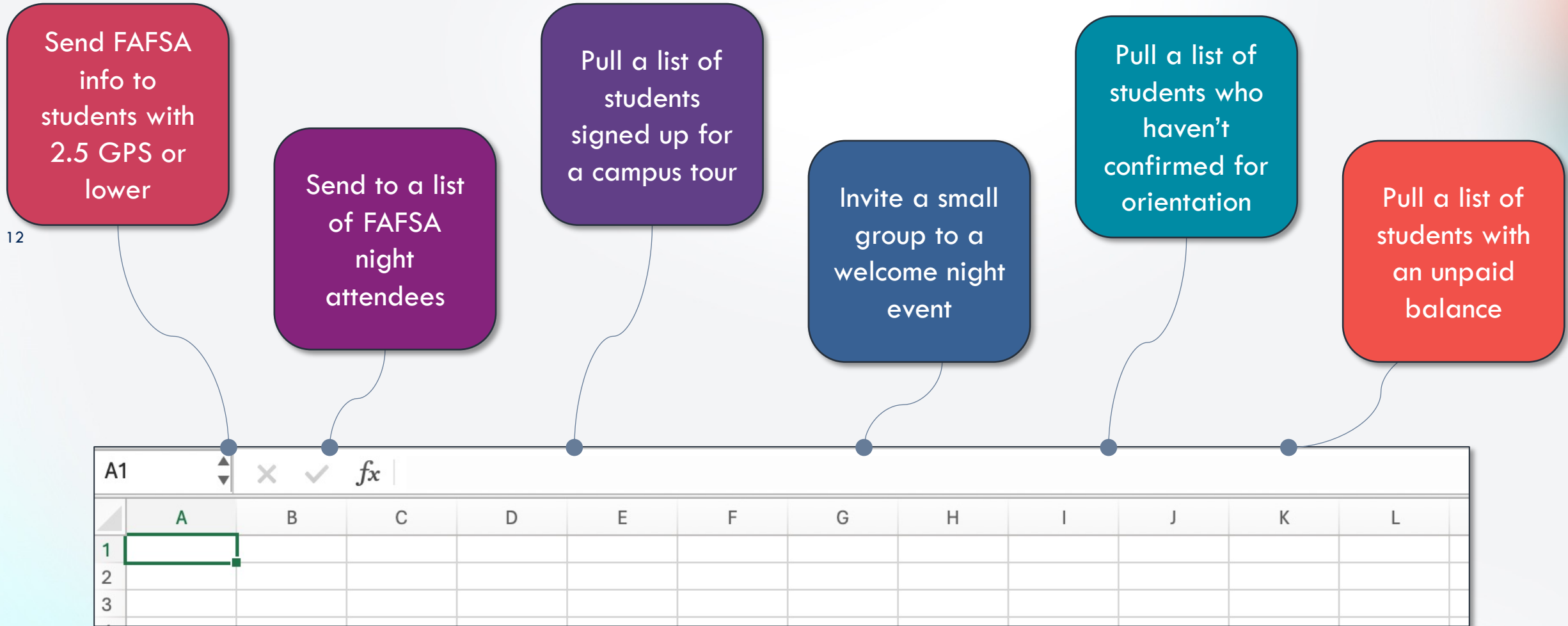
- 2006
- 2008
- 2010
- 2011
- 2015
- 2016
- 2017
- Baltimore
- Boston
- DC

[all groups selected + 7 more groups \(17 groups selected\)](#)

Annual Giving ▼

Campaign Message Examples

When to use a Campaign Message



What about Advanced Search?

Advanced Search

- Data is already in Message
- Hyper-segment your contacts using data
- And/or search functions

14

Match if rules are met

Accounting major [\(rename rule\)](#) [\(delete rule\)](#)

If of the following conditions are met

<input type="text" value="active"/>	<input type="text" value="equals"/>	<input type="text" value="True"/>	<input type="button" value="X"/>
-------------------------------------	-------------------------------------	-----------------------------------	----------------------------------

[+ add another condition](#)

Admit term fall or summer 2024 [\(rename rule\)](#) [\(delete rule\)](#)

If of the following conditions are met

<input type="text" value="admit_term"/>	<input type="text" value="equals"/>	<input type="text" value="fall 2024"/>	<input type="button" value="X"/>
<input type="text" value="admit_term"/>	<input type="text" value="equals"/>	<input type="text" value="summer 2024"/>	<input type="button" value="X"/>

[+ add another condition](#)

New Scholarship Alert!

- We have a new scholarship opportunity available to both in and out-of-state students!
- The criteria are different depending on where you're from
 - In state – 3.0 and above
 - Out of state – 3.5 and above

Advanced Search



Match if Any rules are met

In State above 3.0 [\(rename rule\)](#) [\(delete rule\)](#)

If All of the following conditions are met

HS GPA



is greater than or equal to



3.0

Clear



State Resident



equals



True



[+ add another condition](#)

Out of State above 3.8 [\(rename rule\)](#) [\(delete rule\)](#)

If All of the following conditions are met

HS GPA



is greater than or equal to



3.8

Clear



State Resident



equals



False



[+ add another condition](#)

[+ add another rule](#)

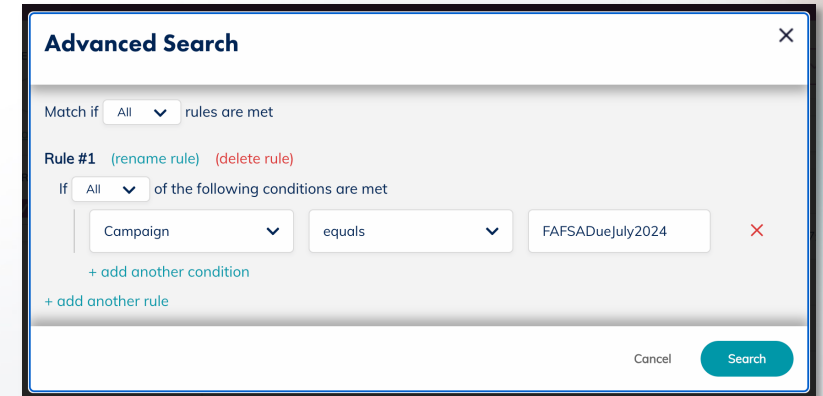
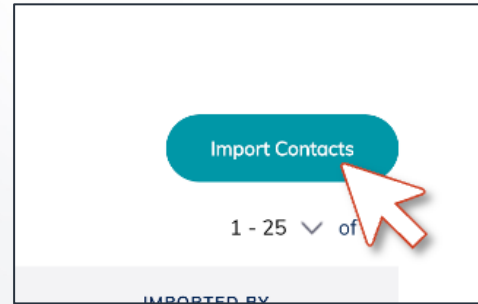
Cancel

Search

Advanced Search Demo

Campaign Field Message

customer_id	group_list	campaign
SV-1	2015;Philadelphia	08.16.2024 meetup followup
SV-2	2017;NYC	08.16.2024 meetup followup
SV-17	2016;Philadelphia	08.16.2024 meetup followup
SV-18	2006;Baltimore	08.16.2024 meetup followup
SV-66	2016;Philadelphia	08.16.2024 meetup followup



Create a data file



Upload contact
data to Message



Run an advanced search
and send message!

Set Up and Send a Campaign Message

Steps to sending a campaign message

1. Create a custom "campaign" field
 - You will only need to do this once!
2. Create a .csv file of your contacts
 - You will need a "customer_id" column and "campaign" column
3. Upload your contacts to Message
4. Run an advanced search
5. Send your message!

Create a Custom "Campaign" Field Type

- Your first step is to create a "campaign" field because it is not automatically available in Message. To create a custom field, go to the Programs tab and select "Manage Fields."
- Click on the "Add Custom Field" button.

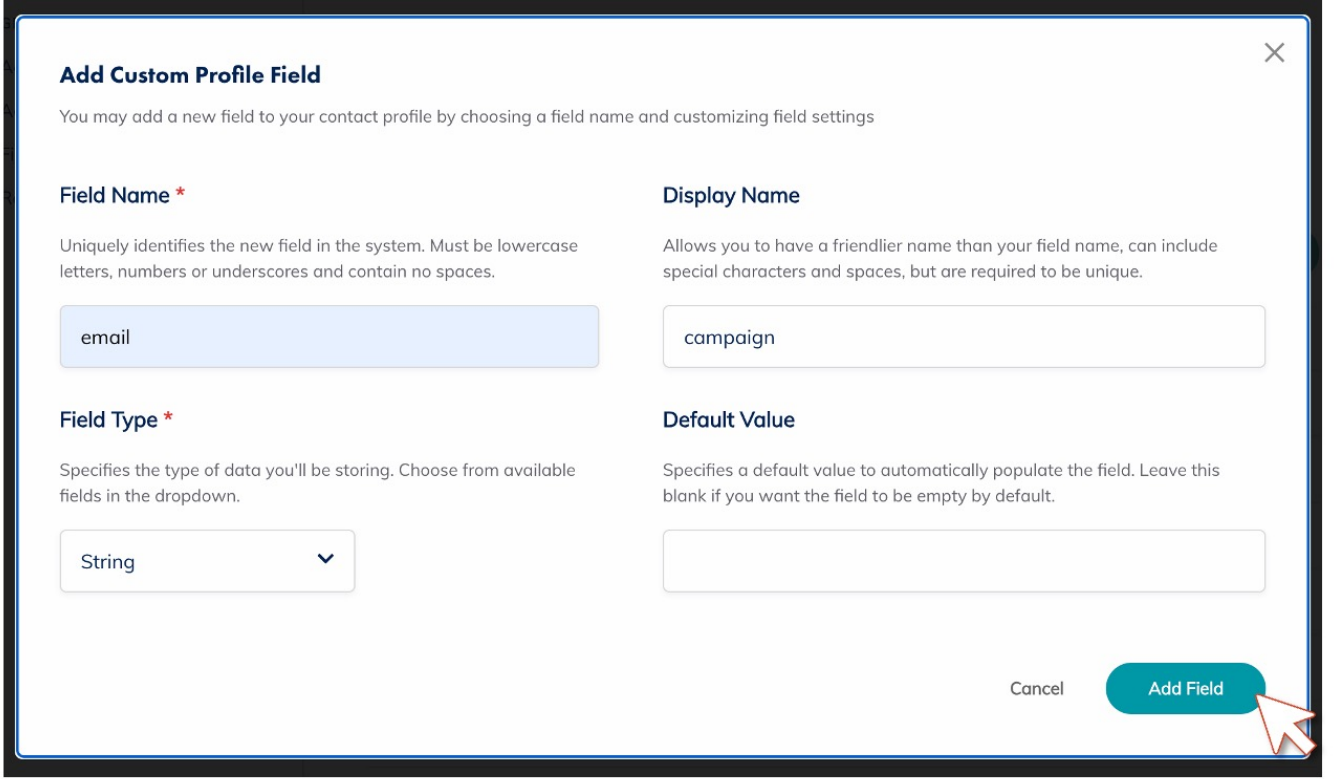
21

The screenshot shows the 'modern campus message' interface. The top navigation bar includes 'Messages', 'Contacts', 'Programs', 'Analytics', and 'Implementation HE'. The 'Programs' tab is selected. On the left, under 'PROGRAMS', 'Admissions Program' is checked. The main content area shows 'Manage Fields for Admissions Program' with a table of existing fields and an 'Add Custom Field' button. A red arrow points to the 'Add Custom Field' button.

DISPLAY NAME	TYPE	VARIABLE NAME	HIDDEN	READONLY	EDIT
app_status	String	app_status	●	●	

Create a Custom "Campaign" Field Type

- Enter "campaign" as the Field Name and "campaign" as the Display Name.
- Choose "String" as the Field Type.



Add Custom Profile Field ✕

You may add a new field to your contact profile by choosing a field name and customizing field settings

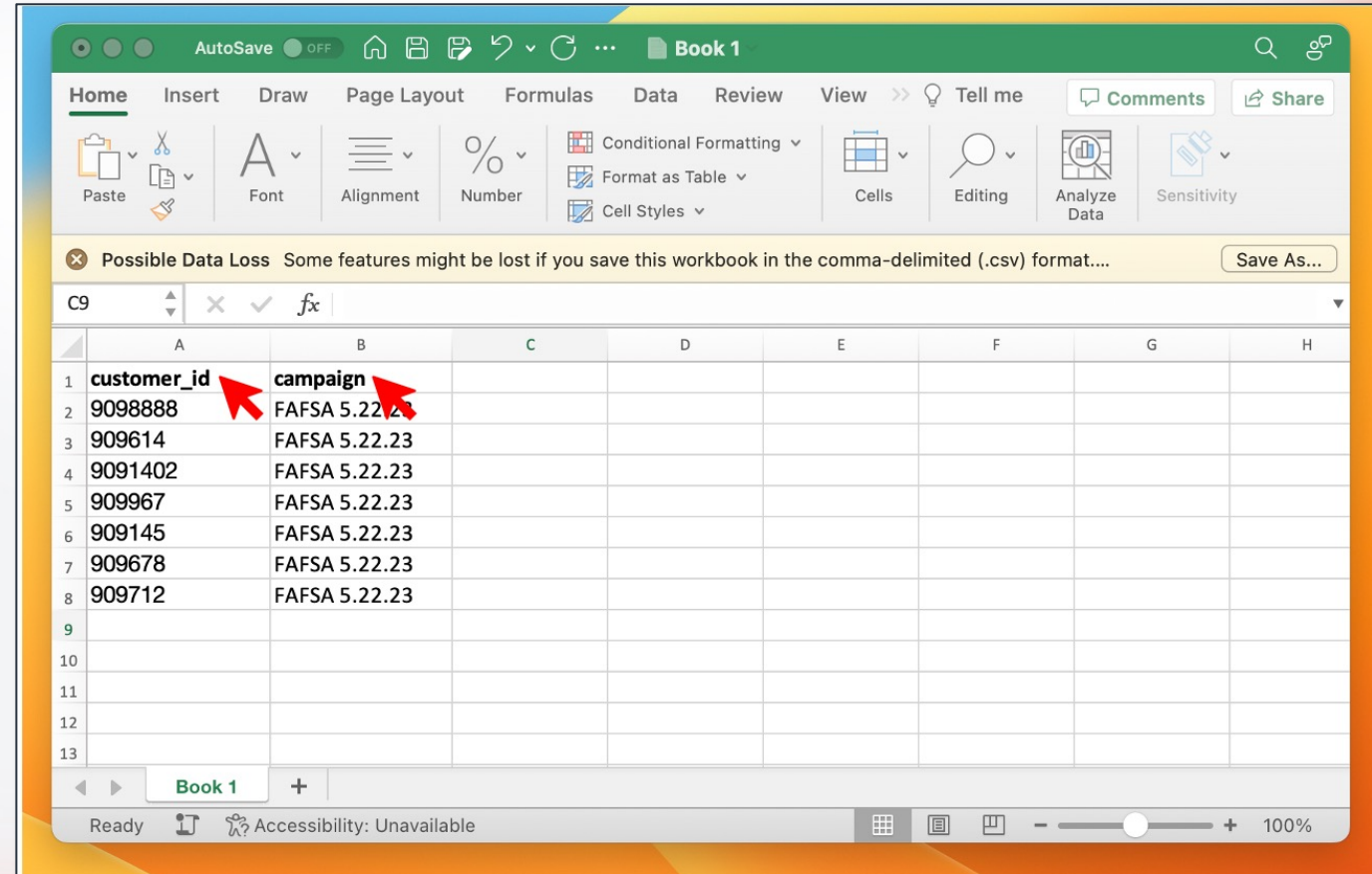
Field Name * Uniquely identifies the new field in the system. Must be lowercase letters, numbers or underscores and contain no spaces.	Display Name Allows you to have a friendlier name than your field name, can include special characters and spaces, but are required to be unique.
<input type="text" value="email"/>	<input type="text" value="campaign"/>
Field Type * Specifies the type of data you'll be storing. Choose from available fields in the dropdown.	Default Value Specifies a default value to automatically populate the field. Leave this blank if you want the field to be empty by default.
<input data-bbox="1217 972 1505 1033" type="text" value="String"/>	<input type="text"/>

Cancel

Import Your Campaign Data:

- Create a spreadsheet file with "customer_id" and "campaign" fields.
- Name your campaign something unique, such as the date, so it won't repeat in later campaigns.

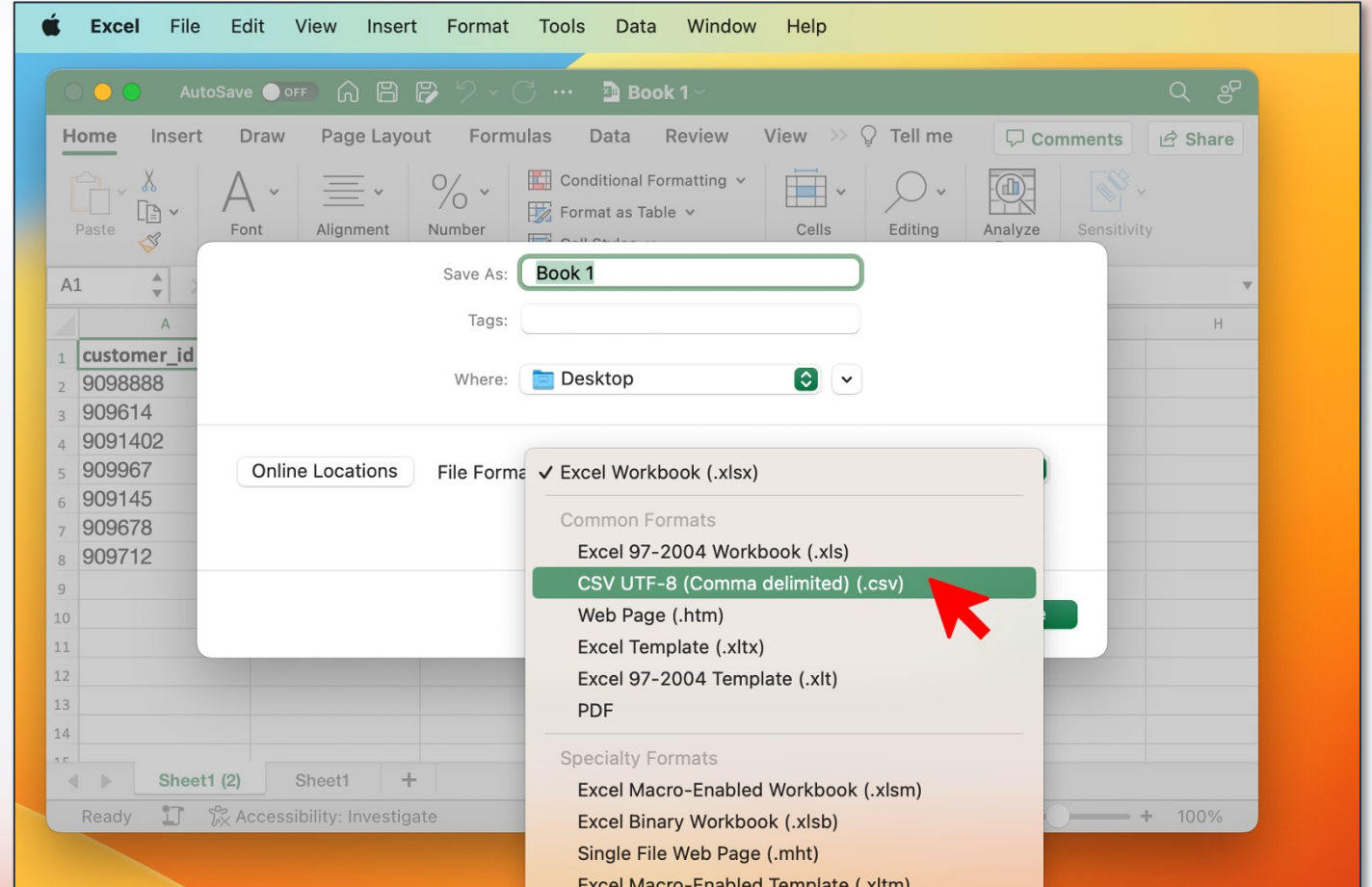
23



Import Your Campaign Data:

- Save and export as a .csv file

24



Import Your Campaign Data:

- In Message, go to the "Programs" tab.
- Select the appropriate Program.
- Navigate to the "Import Contacts" tab.
- Click on the "Import Contacts" button.

The screenshot displays the Modern Campus user interface. At the top, a purple navigation bar contains the following tabs: Messages, Contacts, Programs, and Analytics. The 'Programs' tab is currently selected. To the right of the navigation bar, there are icons for 'Implementation HE', a settings gear, a calendar, and a help question mark. Below the navigation bar, a secondary menu includes 'Message Calendar', 'Settings', 'Add Single Contact', 'Export Contacts', 'Manage Fields', and 'Import Contacts'. The 'Import Contacts' option is highlighted with a red mouse cursor. Below this menu, there are options for 'Autoresponder' and 'Phone Numbers'. A light blue informational banner reads: 'Did you know? You can get a list of contacts without SMS-enabled numbers with a Export Tool.' with a 'Go to Exports' button. The main heading is 'Import Contacts to Admissions Program'. Below this heading is a teal 'Import Contacts' button, which is also highlighted with a red mouse cursor. To the right of the button is a dropdown menu showing '1 - 25 of'. At the bottom of the interface, a table header is visible with columns: START TIME, STATUS, RESULTS, ERROR FILE, and IMPORTED BY.

Import Your Campaign Data:

- Choose your CSV file.
- How do you want to handle the contacts in your file?
 - Unselect "Import new contacts."
 - Select "Update existing contacts."
 - Select "Campaign."
- How do you want to handle errors?
 - Select "Skip the contact and continue the import"
- Click on the "Start Import" button.

How do you want to handle the contacts in your file?

You can ignore new contacts or existing contacts by unchecking the options below. At least one option must be checked.

Import new contact

Update existing contacts

Which fields would you like to update? [select all](#) | [unselect all](#)

campaign customer_id

How do you want to handle errors?

How would you like to us to proceed if we encounter an error with a contact record?

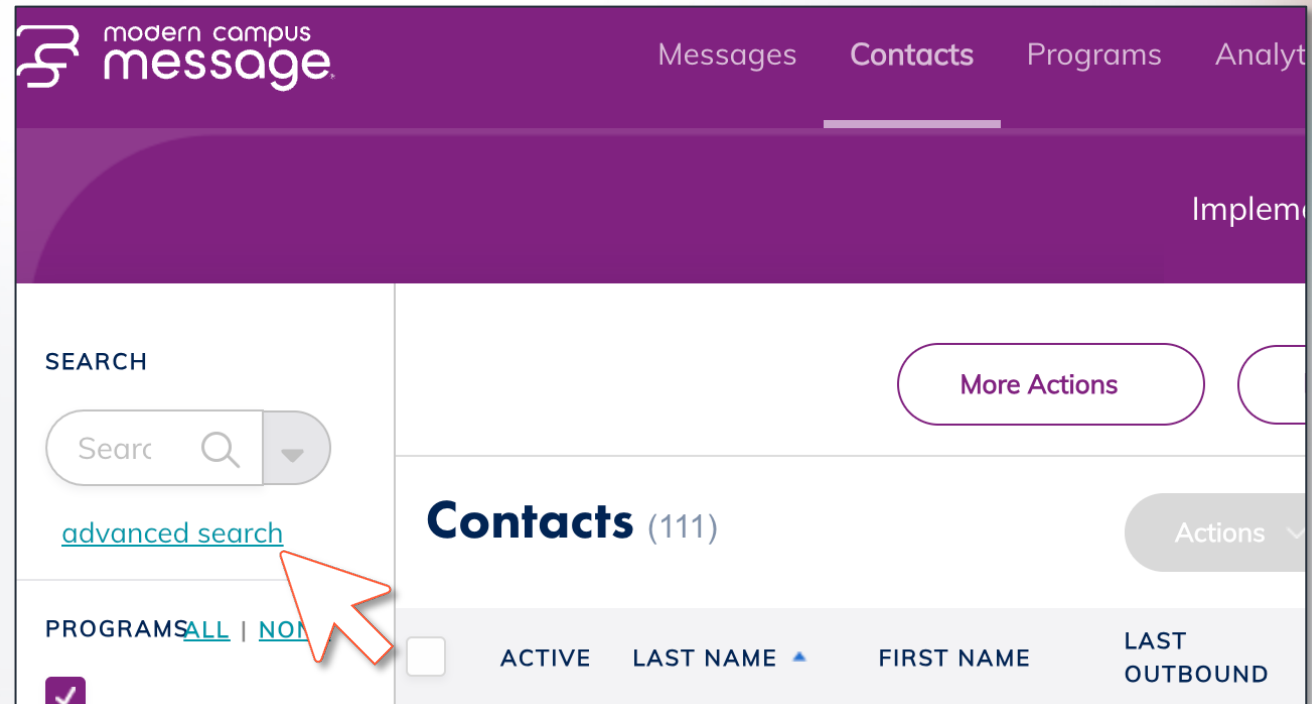
Skip the contact and continue the import

Only import the file if it contains no errors

[Cancel](#) [Start Import](#)

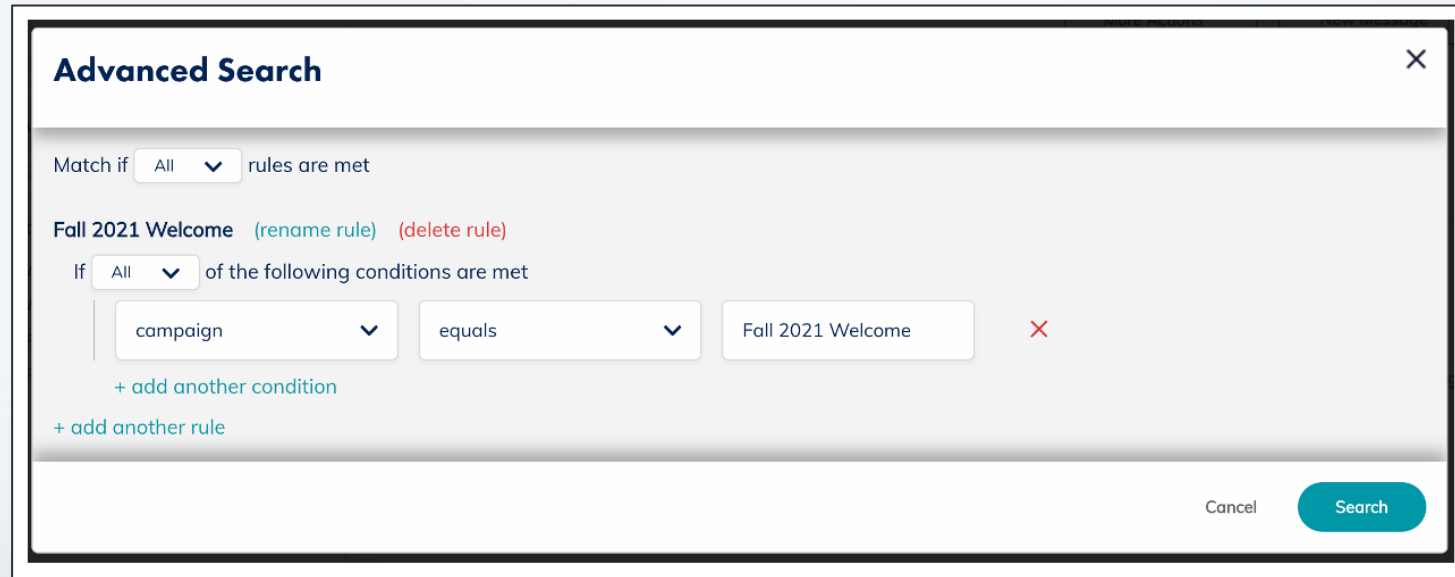
Send Your Campaign Message:

- Note that it may take anywhere from 15 – 90 minutes for your campaign data to sync in Message depending on the date / time of upload.
- Go to the "Contacts" tab.
- Select the relevant Program from the left side panel.
- Click on "advanced search" located under the search bar.



Send Your Campaign Message:

- Select "Add Criteria."
- Choose "campaign" as the attribute.
- Select "equals" as the operator.
- Type in your campaign title (the same header used in your CSV).



The screenshot shows the "Advanced Search" dialog box. At the top, it says "Match if All rules are met". Below that, there is a rule named "Fall 2021 Welcome" with options to "rename rule" or "delete rule". Underneath, it says "If All of the following conditions are met". A single condition is shown: "campaign" (selected from a dropdown) "equals" (selected from a dropdown) "Fall 2021 Welcome". There are links to "+ add another condition" and "+ add another rule". At the bottom right, there are "Cancel" and "Search" buttons.

Send Your Campaign Message:

- Select the dropdown arrow next to “New Message.”
- Send or schedule your message for this campaign group.

29

The screenshot shows the Modern Campus Message interface. The top navigation bar includes 'Messages', 'Contacts', 'Programs', and 'Analytics'. On the right, there are icons for 'Implementation HE', a settings gear, a calendar, and a help question mark. The left sidebar contains a search bar, a 'Rule #1' filter, and a 'PROGRAMS' section with checkboxes for 'Admissions Program', 'Advising', 'Financial Aid', and 'Registrar'. The main content area displays a 'Contacts (91)' table with columns for 'ACTIVE', 'LAST NAME', 'FIRST NAME', 'LAST OUTBOUND', and 'LAST INBOUND'. A 'New Message' button with a dropdown arrow is highlighted, and a mouse cursor is clicking it, opening a dropdown menu with the option 'Send to current results'.

ACTIVE	LAST NAME	FIRST NAME	LAST OUTBOUND	LAST INBOUND
<input type="checkbox"/>	Cook	Eric	Jun 10, 2024, 3:14:36 PM	never
<input type="checkbox"/>	Cox	Susan	Jun 10, 2024, 3:14:09 PM	never
<input type="checkbox"/>	Davis	Rachel	Jun 10, 2024, 3:14:29 PM	never
<input type="checkbox"/>	Delong	Stephanie	Jun 10, 2024, 3:14:36 PM	never
<input type="checkbox"/>	Demsky	Derek	Jun 10, 2024, 3:14:56 PM	Aug 28, 2020, 3:00:59 PM

Campaign message upload demo

30

Bulk Copy+Paste

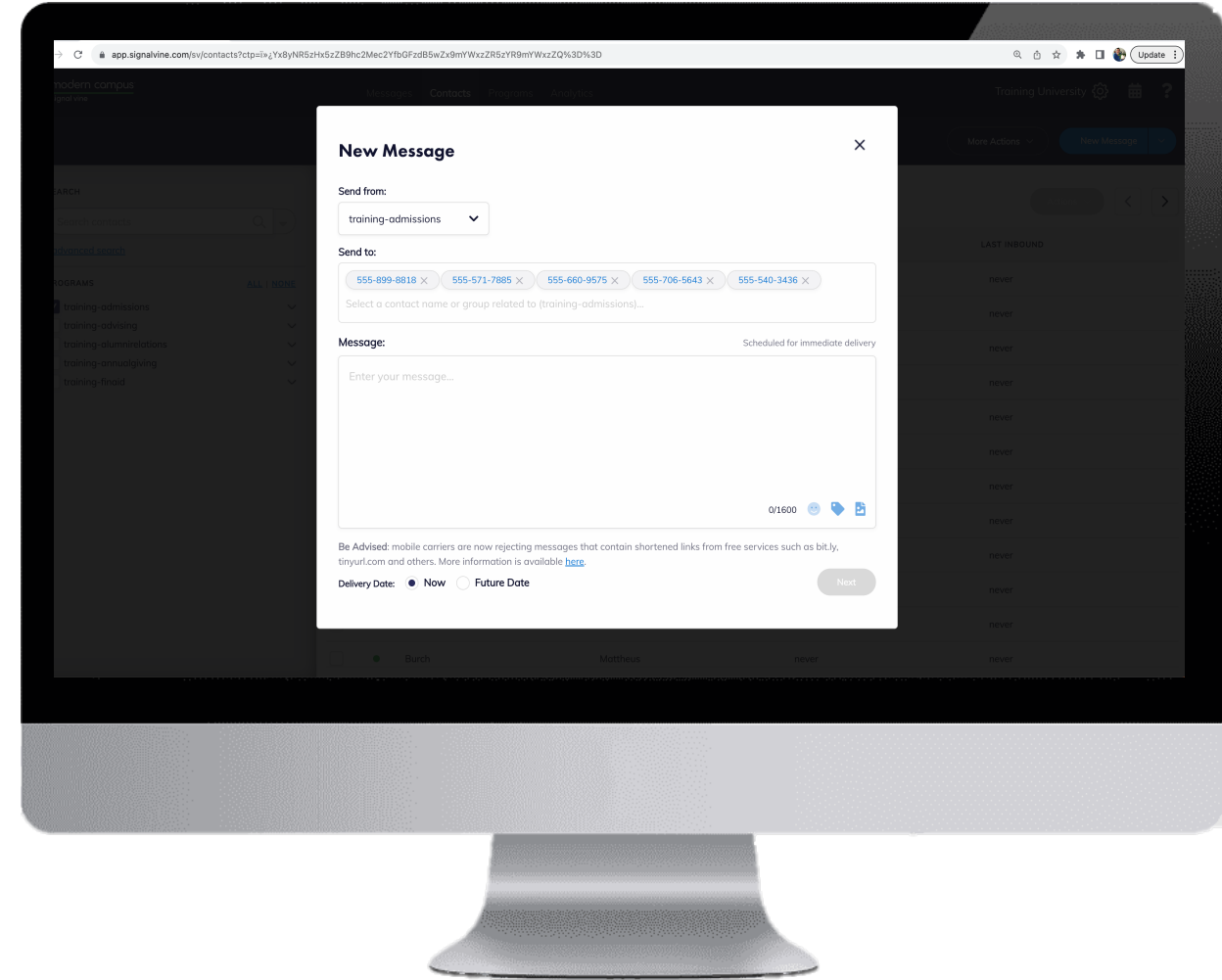
When to use Bulk Copy+Paste

- You have a list of 1,000 or less phone numbers or ID numbers
- You don't need to save the group or other data
- Examples
 - Follow up after an event
 - Pulled a report of student leaders

Copy and Paste a List

- Copy a comma separated list of phone numbers or ID numbers directly into "Send to:"

33



Comma Separated List

NOT Comma Separated ❌

Germain	Duplock	555-899-8818
Morten	Crumbie	555-571-7885
Neala	Dabney	555-660-9575
Sterne	Measham	555-706-5643
Erie	Tilbrook	555-540-3436

Comma Separated ✅

Germain	Duplock	555-899-8818,
Morten	Crumbie	555-571-7885,
Neala	Dabney	555-660-9575,
Sterne	Measham	555-706-5643,
Erie	Tilbrook	555-540-3436,

NOT Comma Separated ❌

Germain	Duplock	555-899-8818
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Erie	Tilbrook	555-540-3436

Comma Separated



Germain	Duplock	555-899-8818,
Morten	Crumbie	555-571-7885,
Neala	Dabney	555-660-9575,
Sterne	Measham	555-706-5643,
Erie	Tilbrook	555-540-3436,

Home Insert Draw Design Layout References >> Tell me Comments Editing Share

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Lila	Roberts	15555951234,
Kathryn	Caldwell	15555559235,
Gretchen	Carlson	15555551250,
Sandy	Stevens	15555551251,
Pauline	Crawford	15555551299,
Maria	Vaughn	15555551249,

Page 1 of 1 18 words English (United States) Focus 97%

n/sv/messages/inbox?cp=i»çYx8yNR5zH05hTh5zZB9kZXNjHnBnH3RydWUec2EfZmF...

Messages Contacts Programs Analytics Implementation Alumni ?

New Message

Send from: Alumni Relations

Send to: Enter the program, group or contact name...

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

Julia Larson 01/07/20
 Susan Larson
 Don Scuderi

Doug Cohen 01/07/20
 Susan Larson
 Thanks for the heads up! Not to...

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!