

Introduce yourself in the chat!
What is your institution and
where in the world are you?

*I'm in Philly, but originally from
Birmingham, AL!*

Custom Fields

Create new custom fields by understanding how to choose the best field type, format your data file, and use your fields!

Kelsey Seale

This webinar is
best for Account
Admin and
Program Admin!

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Agenda

1. Custom Fields FAQ
2. Custom Field Ideas
3. Use Your Fields
 1. Event-Triggered Messages
 2. Advanced Search
 3. Personalized Text
4. Field Types
5. Data File Quick Look
6. Q&A
7. Close



Custom fields expand your Message experience.

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Appointment date
between 9/10/32
– 9/15/23

GPA > 3.0



Application = complete

Attended = true

FAFSA = Not complete

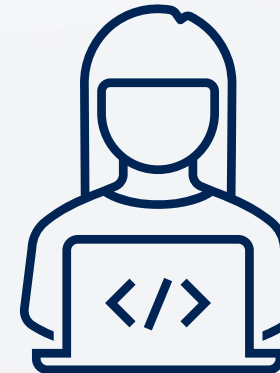
Step 1

Decide what you
want to DO.



Step 2

Create the data
you NEED.



FAQs




In App Demo

- Show how to find custom fields
- Quick tour of the page

Custom fields are permanent.

- They will stay on your export file
- Made a mistake? Make a new custom field!

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Manage Fields for Coaching						Add Custom Field
	DISPLAY NAME	TYPE	VARIABLE NAME	HIDDEN	READONLY	EDIT
☰	first_name	String	first_name	●	●	
☰	last_name	String	last_name	●	●	
☰	Advisor	String	advisor	●	●	

You can restrict counselors from updating custom fields

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Manage Fields for Admissions

Add Custom Field

	DISPLAY NAME	TYPE	VARIABLE NAME	HIDDEN	READONLY	EDIT
☰	App Status	String	app_status	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
☰	Application ...	Maybe (Bool...	application_...	<input type="checkbox"/>	<input type="checkbox"/>	
☰	nickname	String	nickname	<input type="checkbox"/>	<input type="checkbox"/>	

Custom fields are added on a per program basis

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Implementation HE 

PROGRAMS



- ☒ Admissions
- ☐ Advising
- ☐ Financial Aid
- ☐ Registrar

Message Calendar Settings Add Single Contact Export Contacts

Manage Fields Import Contacts Autoresponder Phone Numbers

Manage Fields for Admissions

Add Custom Field

	DISPLAY NAME	TYPE	VARIABLE NAME	HIDDEN	READONLY	EDIT
≡	App Status	String	app_status	<input type="radio"/>	<input checked="" type="radio"/>	
≡	Applicati...	Maybe (B...	applicati...	<input type="radio"/>	<input type="radio"/>	

Custom field data can be viewed on contact cards unless hidden

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[Contacts](#) > Contact Details


Nora Acosta-Smith

Custom Fields

created_at*

08/27/20, 03:25 PM

fafsa_submitted

True 

fall_payment

missed

start_term

fall 2018

Custom Fields

Data Fields

Default Fields

Predefined data fields
Required: name, phone, group, ID

Custom Fields

User generated
Enhance data management and
communication strategies

Implementations HE Admissions Contact Data

Review View Automate Acrobat

General

workbook in the comma-delimited (.csv) format. To preserv

43209

	I	J	K	
	in_state	recruiter	app_completion	
	TRUE	Victoria	TRUE	Ac
	TRUE	Liam	TRUE	Ac
	TRUE	Dylan	FALSE	Pro
	TRUE	Olivia	TRUE	De
	TRUE	Dylan	FALSE	Inc
	TRUE	Victoria	FALSE	Ac
	FALSE	Olivia	TRUE	De
	TRUE	Olivia	FALSE	Inc
	TRUE	Victoria	TRUE	De
	TRUE	Liam	TRUE	De

Custom Data Examples

Types of Data

1. Demographic data: age, gender, ethnicity
3. Academic data: enrollment status, major, GPA
4. Financial data: financial aid status, scholarships
5. Behavioral data: event attendance, communication history

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Contact Segmentation

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Appointment date
between 9/10/32
– 9/15/23

GPA > 3.0



Application = complete

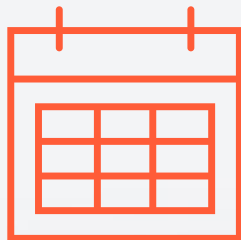
Attended = true

FAFSA = Not complete

College + Career Readiness	Alumni	Academic Advising	Financial Aid	Admissions	Residence Life
<ul style="list-style-type: none"> • GPA • College • High School • Student Type • Advisor Name • Advisor Email • FAFSA Completed • FAFSA Started • High School Grad Year • College Major • College Confirmed • Parent Number 	<ul style="list-style-type: none"> • State • Region • Graduating Class • Current field • Preferred name • Birthday 	<ul style="list-style-type: none"> • Advisor Name • Enrolled Term • Preferred name • Primary major • Anticipated degree date • Major 1 • Major 2 • Advisor Phone • Advisor Email • Appointment Date/Time 	<ul style="list-style-type: none"> • FAFSA submitted • FAFSA completed • Award • Requirements satisfied • GPA • Veteran 	<ul style="list-style-type: none"> • App status • App owner • Campus • Academic area • City • In state • HS GPA 	<ul style="list-style-type: none"> • Residency status • Building • Registration • Active athlete

Two ways to segment with your custom fields

Event
Triggered
Messaging



Advanced
Search



Event Triggered Messages

Event-triggered Message

- Texts that are scheduled in relation to **DATA** rather a specific **DATE**
- Triggers
 - Date field
 - Personal Events / Appointment
 - Enrollment status
 - Etc.
- “Waiting in the wings.”



A contact declares
their major!

Congrats on declaring your major!



A contact met with
their advisor.

Thanks for coming, let us know if I
can help with anything else!



A contact started their
application.

I see you started your application,
don't forget to fill out FAFS!

#	Date/Time	Condition	Content	Save Responses to Data Field
Application_graduation	Last_contribution_date + 3 Days		[first_name] Thank you so much for your generous contribution on [last_contribution_date]. Your support for Cricket University continues to make our vision a reality! You can see our plans at www.cu.edu/plans	

When to use Event Triggered Messages

- The text will send at variable times
- Text is sent based on an **event**
- **Examples**
 - Text sent once student is marked as **admitted**
 - Text sent 7 days after student starts application
 - Text sent on birthday

Event Triggered Messaging

- Automatically send a message
- Based on change in data or event

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Hey Eric! Way to go taking steps toward completing FAFSA! Do you need any help so far? Reply yes or no!

No!

Great! I'll check back closer to the deadline!!



No!

Hey Eric! Way to go taking steps toward completing FAFSA! Do you need any help so far? Reply yes or no!

Great! I'll check back closer to the deadline!!

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Msg #	Date/Time	Condition	Content	Save Response
1	created_at + 10 mins	app_completed = BLANK	<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

Two Types of Events

Date Specific

- Based off date type data Field
- Can be used as jumping off point (3 days after x)
- Can also include other contact conditions
- Examples: Birthdays, App Nudges or Appointment Reminders

Action Specific

- Based off data change
- Usually sent as a “now” message
- Examples: Acceptance Messages or non-response follow up messages

Advanced Search

Advanced Search

- Hyper-segment your contacts using data
- And/or search functions

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

In App Demo

- Advanced search for "scholarship = true"

Personalized Text Messages

Message Personalization

New Message

Send to:

Alumni Relati

Remove this p

active

campaign

created_at

current_city

customer_id

last_name

major

phone

phone_valid

prior_donor

prog

staff_name

timezone

Message:

Hey **first_name**! Will we see you this weekend for the Homecoming Tailgate? |

BH

[Beatrice Hunt](#)

Advising

Is there anything I can help you with o

Ad

Hey Beatrice! Have you declo

Ad

BH

n

Beatrice Hunt · 8/23/19 | 03:43 PM

You still have some time to decide! Do you

Ad

74/1600

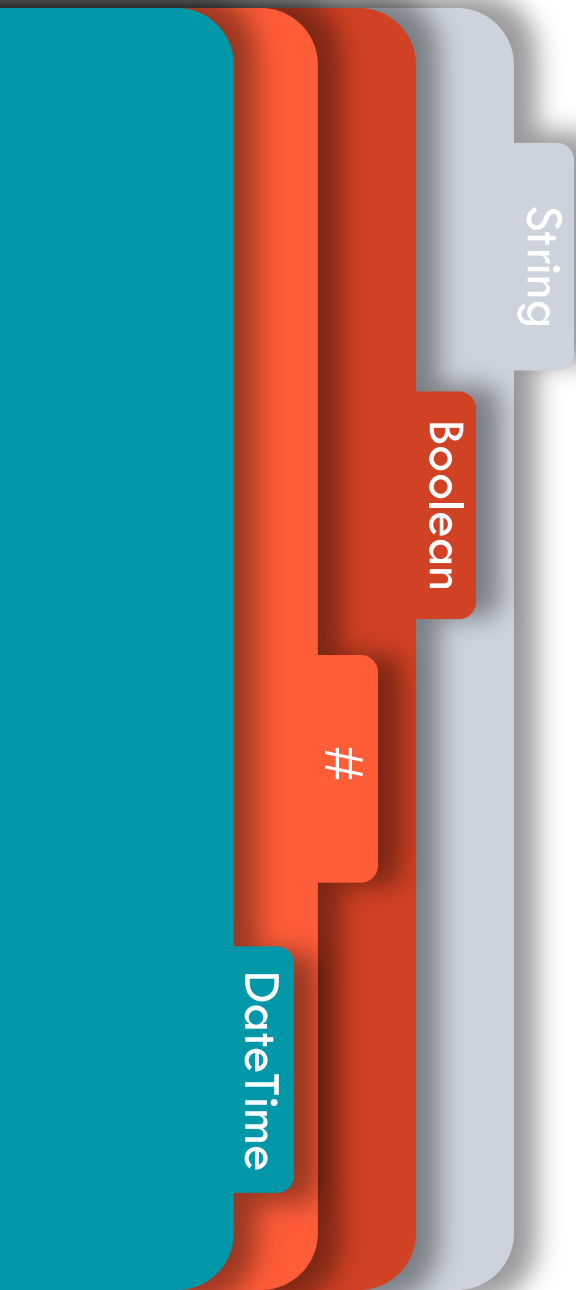


In App Demo

- Show how to send a group message. Include “first_name”

Field Types

Field Types



Field Type: String

No formatting required!

Letters, numbers, spaces, @&^!

Most common

Boolean

#

DateTime

campaign

FAFSA 5.22.23

Advisor

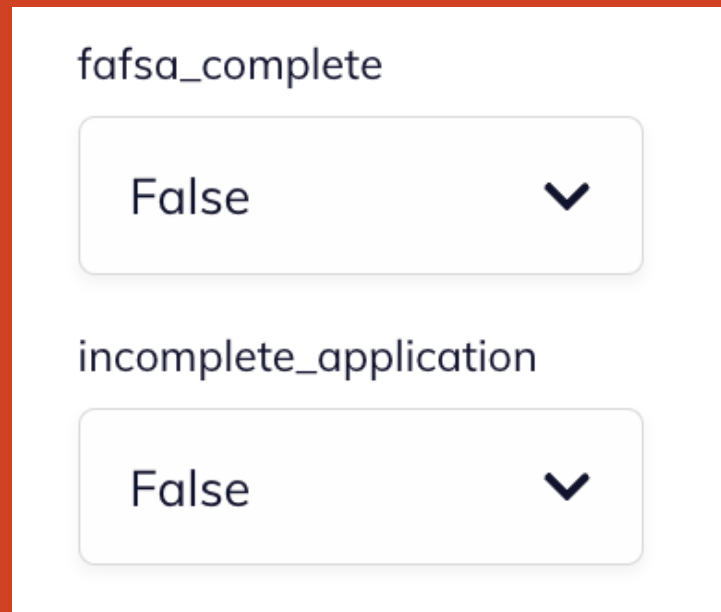
Willie

String

Field Type: Boolean

True / False

Allows you to use data as a variable



A screenshot of a form with two Boolean fields. The first field is labeled 'fafsa_complete' and has a dropdown menu showing 'False'. The second field is labeled 'incomplete_application' and also has a dropdown menu showing 'False'. Both fields are white with rounded corners and a thin border.

String

Boolean

#

DateTime

Field Type: Numeric + Float

Numeric = a whole number

Float = a number and decimal

Can be used to search using $<$, $>$, $=$

Highschool GPA

3.85

String

Boolean

#

DateTime

Field Type: Date / Time

Date: YYYY-MM-DD

Time: HH:MM:SS

Use to schedule birthday messages,
appointment reminders,
or anything else time specific

next_meeting_date

07/17/23



DateTime

#

Boolean

String

In App Demo

1. Show where to find descriptors of each field type.

Program Tab → Custom Field Tab → Scroll to the bottom

Create a Custom Field

Programs Tab → Manage Fields → Add Custom Field

app.signalvine.com/sv/programs/manage-fields

modern campus message

Messages Contacts **Programs** Analytics

Implementation HE

Message Calendar Settings Add Single Contact Export Contacts **Manage Fields** Import Contacts Autoresponder Phone Numbers

PROGRAMS

- ☒ Admissions
- ☐ Advising
- ☐ Financial Aid
- ☐ Registrar

Manage Fields for Admissions

Add Custom Field

DISPLAY NAME	TYPE	VARIABLE NAME	HIDDEN	READONLY	EDIT
App Status	String	app_status	<input type="radio"/>	<input checked="" type="radio"/>	
Application Waiver	Maybe (Boolean)	application_waiver	<input type="radio"/>	<input type="radio"/>	
nickname	String	nickname	<input type="radio"/>	<input type="radio"/>	
Scholarship	Maybe (Boolean)	scholarship	<input type="radio"/>	<input type="radio"/>	

Add Your Field

Lowercase &
no spaces

What you will see on
contact pages and in
Advanced Search

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.

in_state

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.

In State

Field Type *

Specifies the type of data you'll be storing. Choose from available fields in the dropdown.

Choose a field type...

String

Boolean

Float

Numeric

DateTime

Date

Time

Default Value

Specifies a default value to automatically populate the field. Leave this blank if you want the field to be empty by default.

Choose the
best field type

Assigned to ALL contacts
– can be left blank

Cancel

Add Field

custom_list

String

custom_list

alumni

Maybe (Boolean)

alumni

campaign

String

campaign

In App

- Create a custom field
- Show restricted vs. unrestricted
- Show hidden vs. unhidden
- Show how to add the column to the data file
- Show how to change the display name

Data File Quick Guide

What is a data file?

- Used to update contacts or add new contacts
- Always a .csv file
- Contains contact information used in Message
- Can be manually updated by program and account admin

A	B	C	D	E	
customer_id	major	donation_amo	staff_name	prior_donor	sign
10000	Communicatio	\$500.00	Joe	FALSE	225
10001	Anthroplogy	\$25.00	Joe	YES	225
10002	International R	\$80.00	Joe	NO	225
10003	History		Joe	TRUE	225
10004	International R	90	Kris		225
10005	Anthroplogy	N/A	Joe		225
10006	Communicatio	N/A	Joe	TRUE	225
10007	International R	N/A	Kris	TRUE	225
10008	History	100	Laney		225
10009	Business	N/A	Joe	FALSE	225

Where is my data file?

- Do you have a master file?
 - Communicate with other users in your institution
 - Who is supposed to update / add?
- Export your data to create an data file
 - Program tab
 - Export contacts
 - *there are fields in the export file that will fail your import, delete them!

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The screenshot shows the 'Export Contacts' page in the Modern Campus interface. At the top, there is a navigation bar with links: 'Message Calendar', 'Settings', 'Add Single Contact', 'Export Contacts' (which is highlighted with a purple underline), 'Manage Fields', and 'Import Contacts'. Below this, there are two sub-links: 'Autoreponder' and 'Phone Numbers'. The main heading is 'Export Contacts from Alumni Relations'. Underneath, it says 'Export Contact Data' followed by a paragraph: 'What contact data would you like us to export? Exports will be formatted as CSV file and emailed to your account email address.' There are two radio button options: 'All Contacts' (which is selected) and 'Only Unreachable Contacts'. Each option has a descriptive sentence below it. At the bottom, there is a teal button labeled 'Begin Export'.

Message Calendar Settings Add Single Contact **Export Contacts** Manage Fields Import Contacts

Autoreponder Phone Numbers

Export Contacts from Alumni Relations

Export Contact Data

What contact data would you like us to export? Exports will be formatted as CSV file and emailed to your account email address.

☒ All Contacts
The export will contain all profile data for each contact that you have access to view in this program.

☐ Only Unreachable Contacts
The export will contain all profile data for any contact that does not have an SMS-enabled phone number.

[Begin Export](#)

Avoid an Error!

- Delete the extra columns
- Edit your data
- Reupload the file!

When you export your data, message will add a few extra columns at the end. Get rid of them!

	sys_send_1	sys_carrier	sys_phone_type
000000	FALSE	UNKNOWN	UNKNOWN
000000	FALSE	UNKNOWN	UNKNOWN
000000	TRUE	UNKNOWN	UNKNOWN
000000	TRUE	UNKNOWN	UNKNOWN

Want more help with your data file?

- Check today's resources for a webinar all about data!

Resources

1. [How do I create new custom fields?](#)
2. [How do I make a field read-only?](#)
3. [How do I change a field's display name?](#)
4. [How do I hide a field?](#)
5. [Import New Contacts With A .CSV Data File Upload](#)
6. [Contact & Data Management \(with Upload Errors!\) Webinar - August 2024](#)
7. See below for a few ideas when it comes to custom fields. Leave a comment if you have a new one!

Format Your Data

Data File Rules

1. .CSV file
2. Column headers must be **all lower case, no spaces**
3. Column headers must **match your field name 100%**
 - Check this under → **Program Tab; → Custom Fields**
 - Note: Custom fields cannot be edited once they're created
4. Type of data must **match the field type** exactly
 - There's a cheat sheet at the bottom of → **Program Tab; → Custom Fields**
5. You always need **customer_id** or **signalvine_id** when updating

.CSV file

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The image shows a 'Save As' dialog box with a light gray grid background. The dialog is white with rounded corners. At the top, the 'Save As:' label is followed by a text field containing 'Message Data File', which is highlighted with a green border. Below this is a 'Tags:' label followed by an empty text field. The 'Where:' label is followed by a dropdown menu showing 'Desktop' with a folder icon, a green expand/collapse button, and a small downward arrow. In the middle section, there is a tab labeled 'Online Locations' and a 'File Format:' dropdown menu showing 'Comma Separated Values (.csv)', which is highlighted with a red border and has a green expand/collapse button. Below the file format is an 'Options...' button. At the bottom right, there are 'Cancel' and 'Save' buttons, with 'Save' being green and 'Cancel' being white with a gray border.

Save As: Message Data File

Tags:

Where: Desktop

Online Locations

File Format: Comma Separated Values (.csv)

Options...

Cancel Save

Column headers must be **all lower case, no spaces**

	B	C	D	E
	customer_id	major	Email	donation_am
4 r	10000	Communications		\$50
4 r	10001	Anthropology		\$2

55

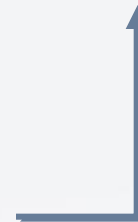
Column headers must **match your field name** **100%**

D	E	F
ail	dollar_amount	staff_na
s	\$500.00	Joe
	\$25.00	Joe
ations	\$80.00	Joe
		Joe
ations	N/A	Kris


≡	email	String
≡	donation_amount	String
≡	staff_name	String
≡	phone_valid	Boolean

Check this under → **Program Tab**; → **Custom Fields**

Note: Custom fields cannot be edited once they're created




Type of data must **match the field type** exactly




☰ prior_donor Maybe (Boolean)

57

Boolean Displayed as a checkbox with 2 possible values called "true" and "false" true/false



	G	H
name	prior_donor	signalv
	FALSE	300
	YES	225301
	NO	225306
	TRUE	225307
		225318



There's a cheat sheet at the bottom of
→ **Program Tab**; → **Custom Fields**

You always need **customer_id** or **signalvine_id** when updating

E4

	A	B	C	D	E
1	first_name	last_name	group_list	phone	
2	Lila	Roberts	2015;Boston	15555551234	
3	Kathryn	Caldwell	2017;NYC	15555551235	
4	Gretchen	Carlson	2016;Philadelphi	15555551250	
5	Sandy	Stevens	2006;Baltimore	15555551251	
6	Pauline	Crawford	2016;Philadelphi	15555551299	
7	Maria	Vaughn	2017;NYC	15555551249	
8	Willie	Boyd	2015;Boston	15555551269	
9	Winifred	Lloyd	2016;Philadelphi	15555551285	
10	Yolanda	Curry	2006;Baltimore	15555551328	
11	Darin	Abbott	2006;Baltimore;	15555551244	
12	Tony	Rogers	2006;Baltimore	15555551272	
13	Vincent	Lee	2015;Boston	15555551248	
14	Sylvia	Ford	2006;Baltimore	15555551265	

Create Your File

- Import New Contacts: Required Fields

- **customer_id – HIGHLY RECOMMENDED**
- first_name
- last_name
- group_list
- phone_number

	A	B	C	D	E
1	customer_id	first_name	last_name	group_list	phone_number
2					
3					
4					
5					

- Update existing contacts

- customer_id or signalvine_id
- The field you want to update!

	A	B
1	customer_id	donation_amount
2		
3		

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!