

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!

This webinar is
best for Account
Admin and
Program Admin!

Kelsey Seale

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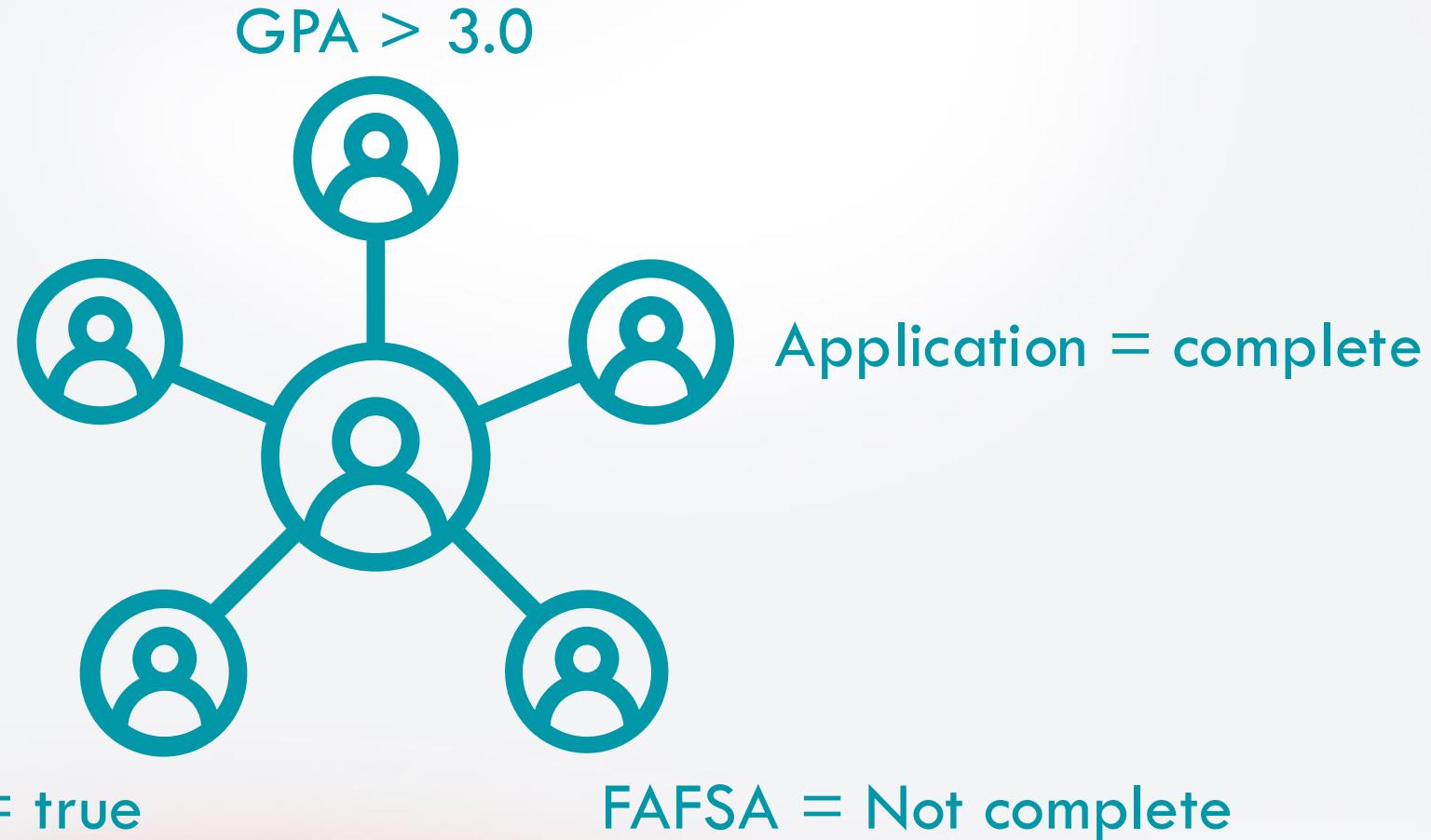
Agenda

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.

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



Step 1

Decide what you
want to DO.



Step 2

Create the data
you NEED.



How can I use data?

- **Combat Decreased Enrollment**

- Pulling enrollment status (prior and current semesters)
- hold codes
- financial aid status.

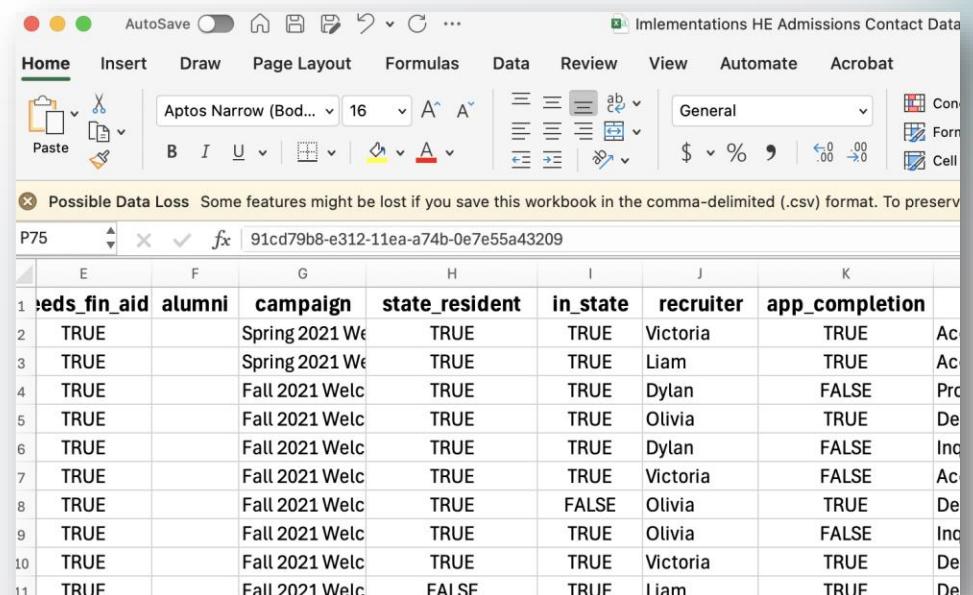
6

- **Increase Event Attendance**

- Pulling location
- high school information.

- **Increase Alumni Giving**

- Pulling previous donation status and amount
- degree type
- undergraduate program



	E	F	G	H	I	J	K
1	eds_fin_aid	alumni	campaign	state_resident	in_state	recruiter	app_completion
2	TRUE		Spring 2021 We	TRUE	TRUE	Victoria	TRUE
3	TRUE		Spring 2021 We	TRUE	TRUE	Liam	TRUE
4	TRUE		Fall 2021 Welc	TRUE	TRUE	Dylan	FALSE
5	TRUE		Fall 2021 Welc	TRUE	TRUE	Olivia	TRUE
6	TRUE		Fall 2021 Welc	TRUE	TRUE	Dylan	FALSE
7	TRUE		Fall 2021 Welc	TRUE	TRUE	Victoria	FALSE
8	TRUE		Fall 2021 Welc	TRUE	FALSE	Olivia	TRUE
9	TRUE		Fall 2021 Welc	TRUE	TRUE	Olivia	FALSE
10	TRUE		Fall 2021 Welc	TRUE	TRUE	Victoria	TRUE
11	TRUE		Fall 2021 Welc	FALSE	TRUE	Liam	TRUE

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	<input type="radio"/>	<input type="radio"/>	
last_name	String	last_name	<input type="radio"/>	<input type="radio"/>	
Advisor	String	advisor	<input type="radio"/>	<input type="radio"/>	

You can restrict counselors from updating custom fields

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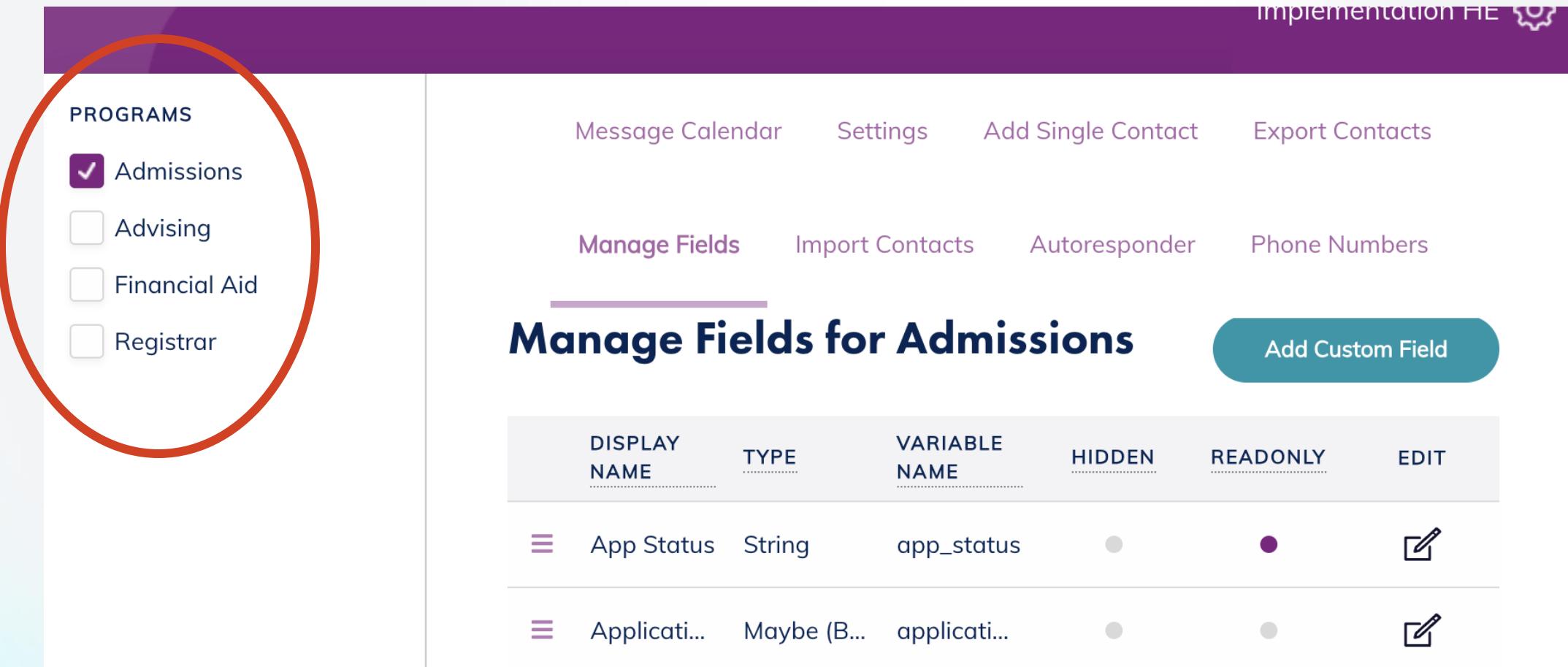
Manage Fields for Admissions

Add Custom Field

DISPLAY NAME	TYPE	VARIABLE NAME	HIDDEN	READONLY	EDIT
App Status	String	app_status	•	•	
Application ...	Maybe (Bool...)	application_...	•	•	
nickname	String	nickname	•	•	



Custom fields are added on a per program basis



Implementation FIE 

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

[Contacts](#) > Contact Details

Nora Acosta-Smith

Custom Fields

created_at*

08/27/20, 03:25 PM

fafsa_submitted

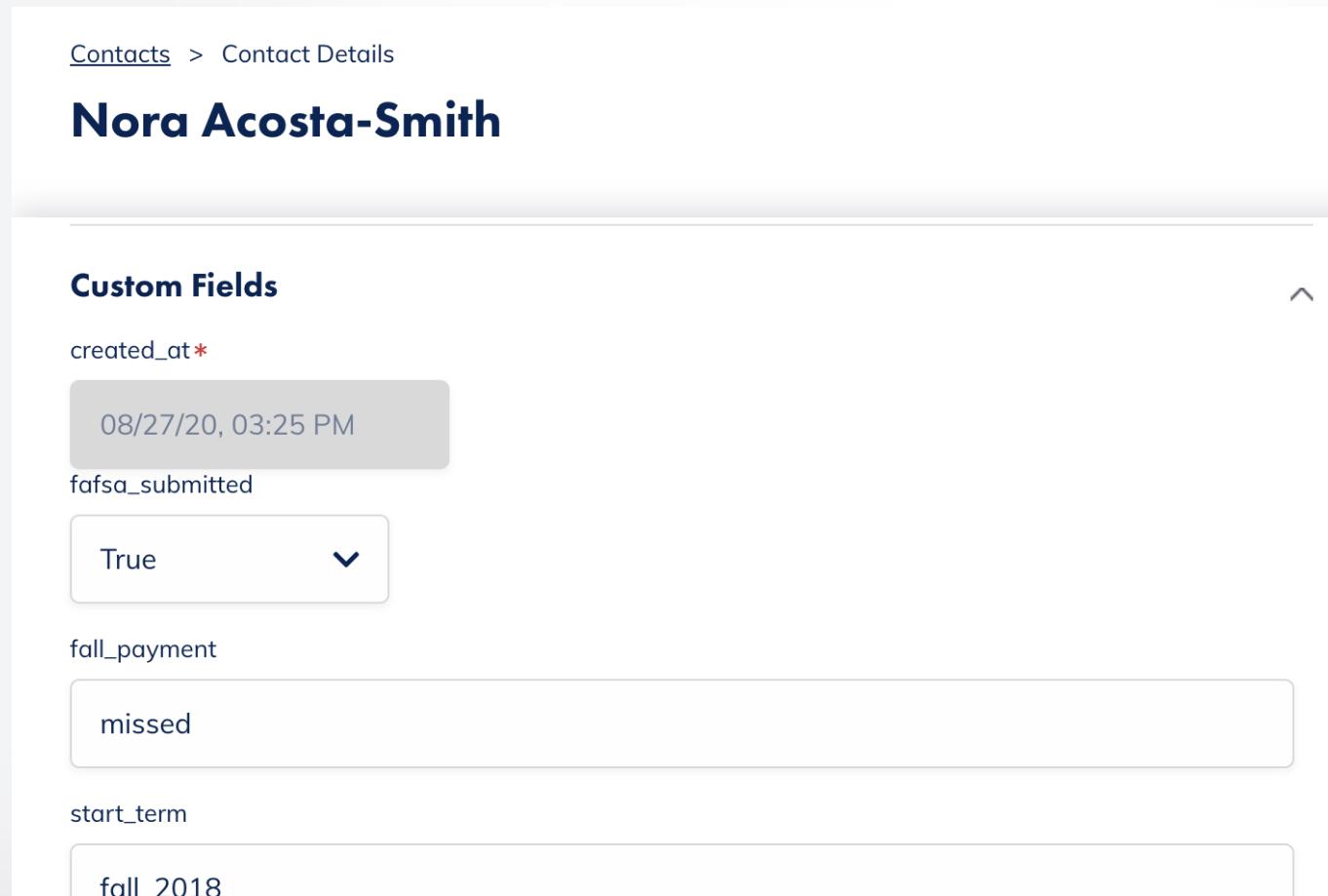
True

fall_payment

missed

start_term

fall 2018



Custom Fields

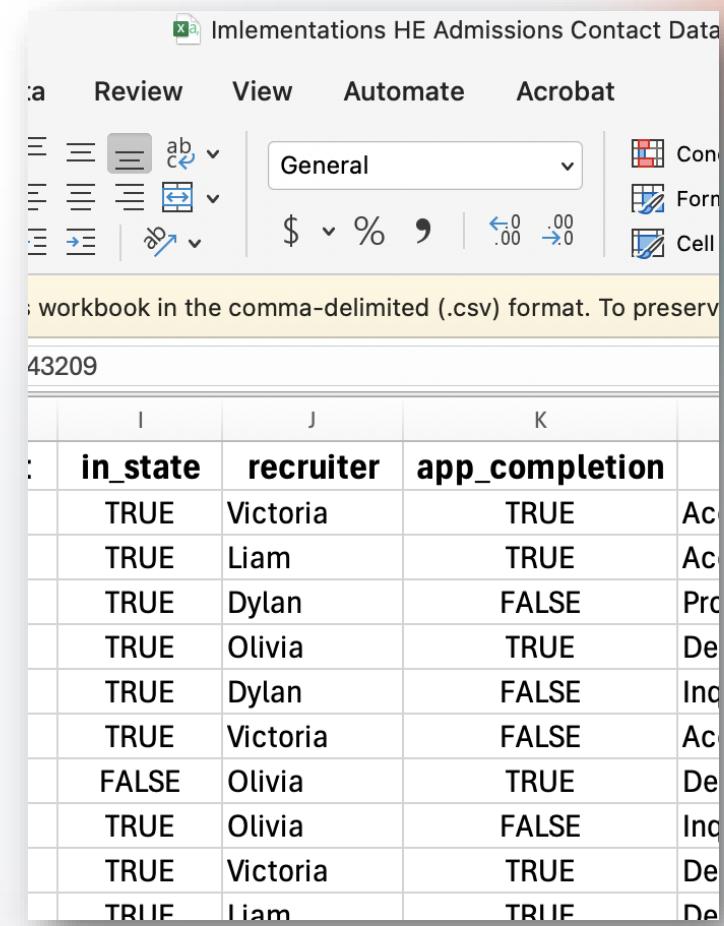
Data Fields

Default
Fields

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

Custom
Fields

User generated
Enhance data management and
communication strategies



The screenshot shows a Microsoft Excel spreadsheet with the following data:

	I	J	K
	in_state	recruiter	app_completion
1	TRUE	Victoria	TRUE
2	TRUE	Liam	TRUE
3	TRUE	Dylan	FALSE
4	TRUE	Olivia	TRUE
5	TRUE	Dylan	FALSE
6	TRUE	Victoria	FALSE
7	FALSE	Olivia	TRUE
8	TRUE	Olivia	FALSE
9	TRUE	Victoria	TRUE
10	TRUE	Liam	TRUE

Custom Data Examples

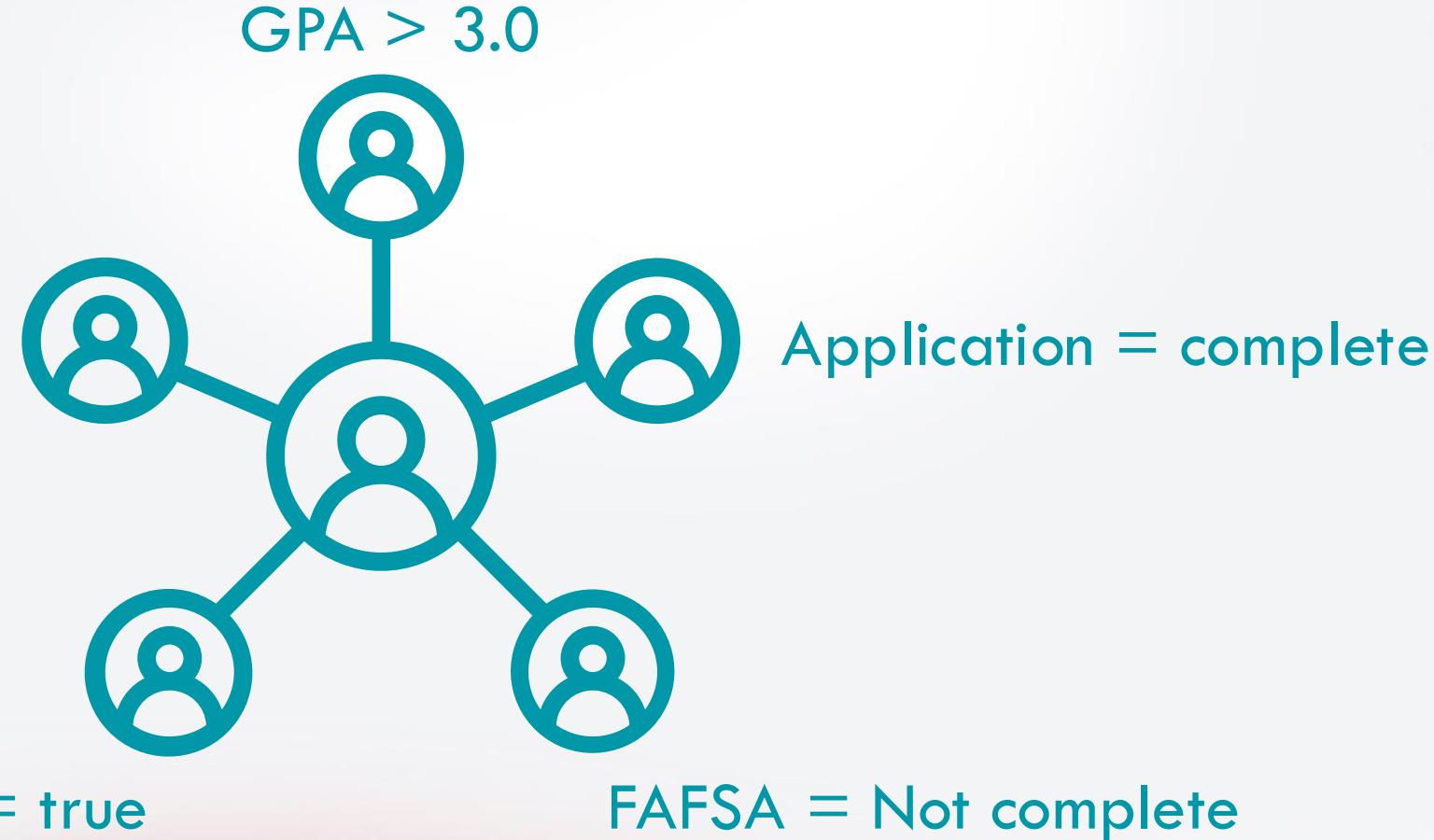
Types of Data

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

Contact Segmentation

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



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!



A contact met with
their advisor.



A contact started their
application.

Congrats on declaring your major!

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

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

#	Date/Time	Condition	Content	Save Responses to Data Field
2	Application_graduation <code>Last_contribution_date + 3 Days</code>		<p>[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</p>	

When to use Event Triggered Messages

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- 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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fafsa_started is
updated to TRUE

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!!



fafsa_started is updated to TRUE

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

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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 All rules are met

Accounting major (rename rule) (delete rule)

If All of the following conditions are met

active equals True X

+ add another condition

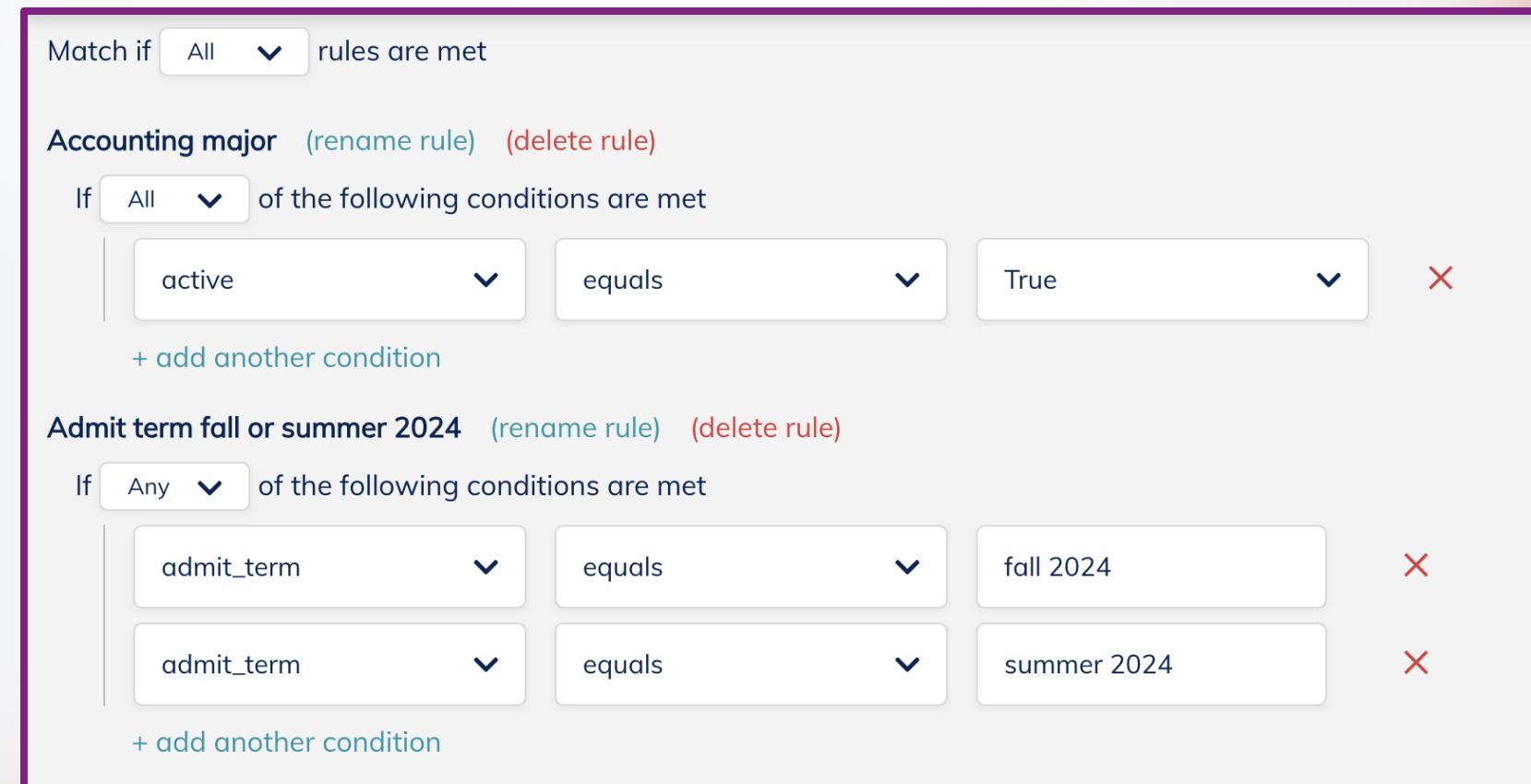
Admit term fall or summer 2024 (rename rule) (delete rule)

If Any of the following conditions are met

admit_term equals fall 2024 X

admit_term equals summer 2024 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

X

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

Clear



+ 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

Clear



+ 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 Relations

Remove this person

active campaign created_at current_city customer_id

last_name major phone phone_valid prior_donor

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 or...

Hey Beatrice! Have you decl...

BH n
Beatrice Hunt · 8/23/19 | 03:43 PM

You still have some time to decide! Do you...

74/1600

In App Demo

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

Field Types

Field Types

DateTime

#

Boolean

String

Field Type: String

No formatting required!

Letters, numbers, spaces, @&^!

Most common

DateTime

#

Boolean

campaign

FAFSA 5.22.23

Advisor

Willie

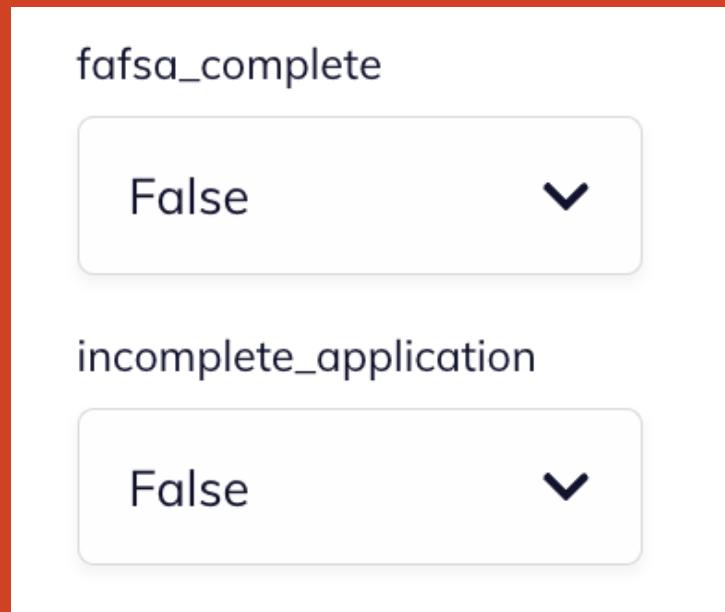
Field Type: Boolean

True / False

Allows you to use data as a variable

#

DateTime



fafsa_complete

False

incomplete_application

False

Field Type: Numeric + Float

Numeric = a whole number

Float = a number and decimal

Can be used to search using <, >, =

Highschool GPA

3.85

DateTime

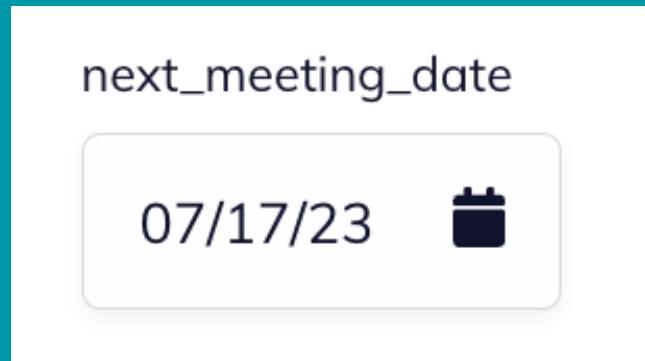
#

Field Type: Date / Time

Date: YYYY-MM-DD

Time: HH:MM:SS

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



modern
campus

String

Boolean

#

DateTime

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

The screenshot shows the modern campus message software interface. The top navigation bar includes links for Messages, Contacts, Programs (which is highlighted in purple), and Analytics. Below the navigation bar, a purple sidebar on the left lists 'PROGRAMS' with checkboxes for Admissions (checked), Advising, Financial Aid, and Registrar. The main content area is titled 'Manage Fields for Admissions'. It features a table with columns: DISPLAY NAME, TYPE, VARIABLE NAME, HIDDEN, READONLY, and EDIT. The table contains four rows of data. A large red arrow points from the 'Programs' tab in the navigation bar to the 'Manage Fields' button in the main content area. Another large red arrow points from the 'Manage Fields' button to the 'Add Custom Field' button in a teal button at the bottom right of the table. The 'Add Custom Field' button is also highlighted with a red arrow.

DISPLAY NAME	TYPE	VARIABLE NAME	HIDDEN	READONLY	EDIT
App Status	String	app_status	●	●	
Application Waiver	Maybe (Boolean)	application_waiver	●	●	
nickname	String	nickname	●	●	
Scholarship	Maybe (Boolean)	scholarship	●	●	

Add Your Field

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Lowercase &
no spaces

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

Choose the
best field type

Choose a field type...

String

Boolean

Float

Numeric

DateTime

Date

Time

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

Default Value

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

What you will see on
contact pages and in
Advanced Search

Assigned to ALL contacts
– can be left blank

Cancel Add Field

In App

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- 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

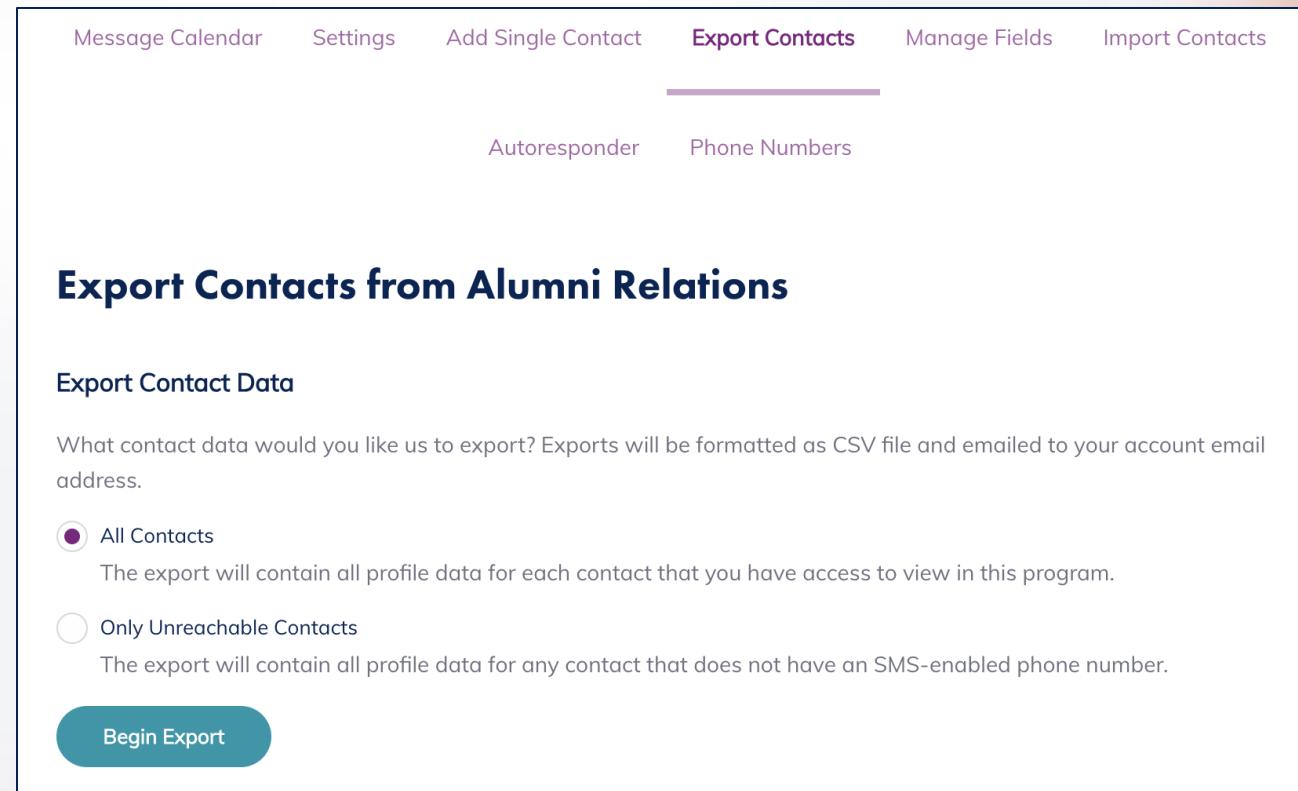
48

A	B	C	D	E	
customer_id	major	donation_amt	staff_name	prior_donor	sign
10000	Communication	\$500.00	Joe	FALSE	225
10001	Anthropology	\$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	Anthropology	N/A	Joe		225
10006	Communication	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!**



The screenshot shows a user interface for managing contacts. At the top, there are several navigation links: Message Calendar, Settings, Add Single Contact, Export Contacts (which is underlined in purple, indicating it is the active tab), Manage Fields, and Import Contacts. Below these, there are two sub-links: Autoresponder and Phone Numbers. The main content area is titled "Export Contacts from Alumni Relations". Under this title, there is a section titled "Export Contact Data" with the sub-instruction: "What contact data would you like us to export? Exports will be formatted as CSV file and emailed to your account email address." Two radio buttons are provided for selection:

- 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.

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!

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	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!

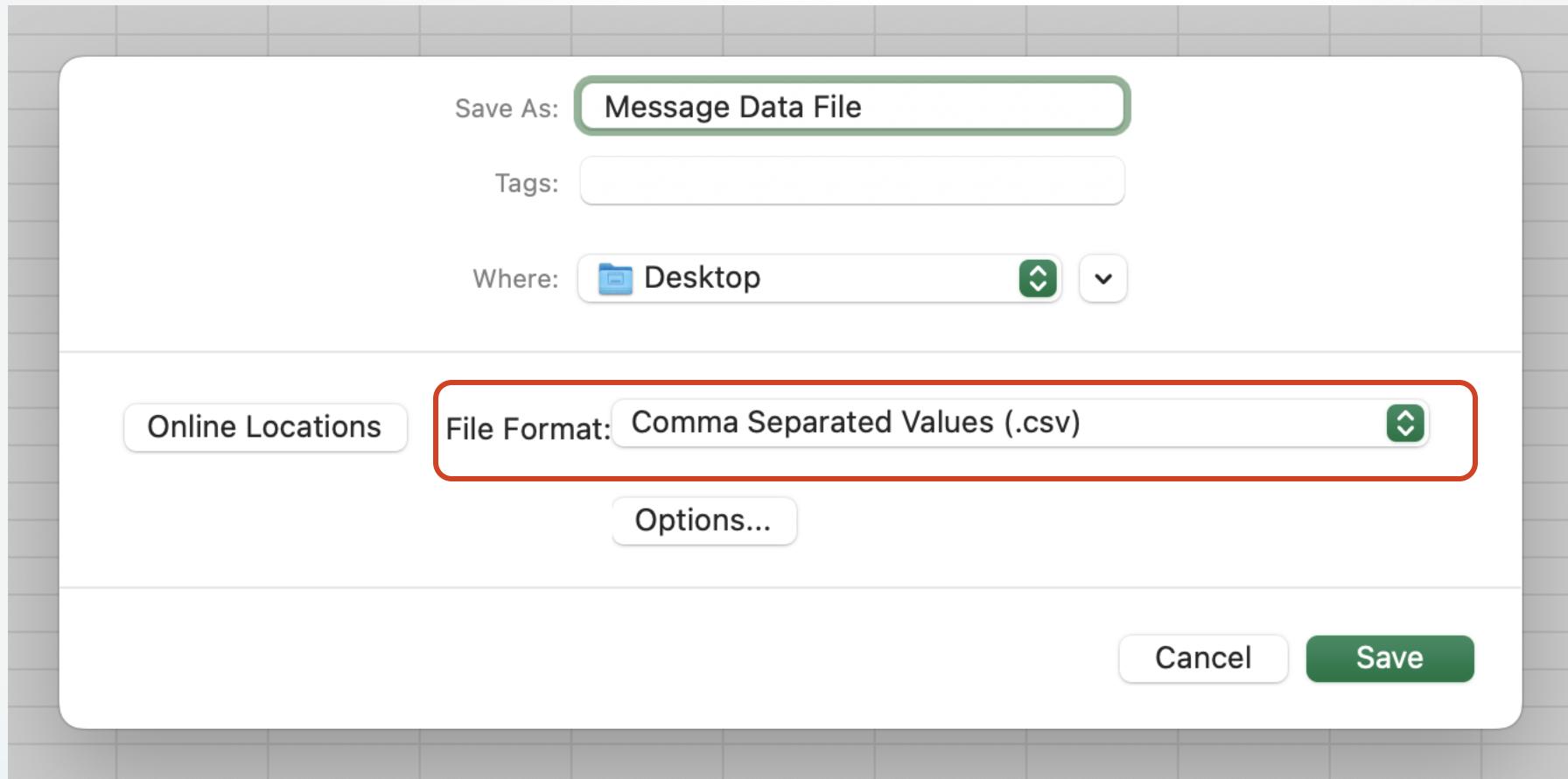


Format Your Data

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



Column headers must be all lower case, no spaces

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	B	C	D	E
	customer_id	major	Email	donation_am
4	1	10000	Communications	\$50
4	1	10001	Anthroplogy	\$2

Column headers must match your field name 100%

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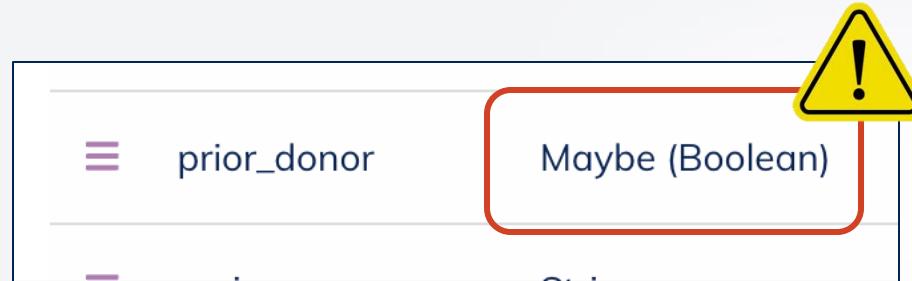
D	E	F
ail	dollar_amount	staff_na
s	\$500.00	Joe
	\$25.00	Joe
ations	\$80.00	Joe
		Joe
ations	N/A	Kris

≡	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



Boolean

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

true/false

name	prior_donor	signalvalue
	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

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	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;Philadelphia	15555551250	
5	Sandy	Stevens	2006;Baltimore	15555551251	
6	Pauline	Crawford	2016;Philadelphia	15555551299	
7	Maria	Vaughn	2017;NYC	15555551249	
8	Willie	Boyd	2015;Boston	15555551269	
9	Winifred	Lloyd	2016;Philadelphia	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	
	Julia	Ford	2006;Baltimore	15555551005	

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!