



modern[®] campus

Engaging Modern Learners
For Life

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

Advanced Search

Learn how to use your data to segment contacts for targeted texting.

Advanced Search

Learn how to use your data to segment contacts for targeted texting.

Post-Webinar Survey

- 2 minutes!
- We love knowing what you like or would like improved!
- Really helps me (Kelsey) out when presenting to my bosses 😊
- I'll provide a link at the end or you will get an email tomorrow!!!

* 3. Overall, were you satisfied with your training?

☐ Yes

☐ No

* 4. On the following scale, how **helpful** and **informative** was the training webinar?

1 - Not Helpful

2

3 - Neutral

4

5 - Helpful

☐

☐

☐

☐

☐

Additional comments to reflect your score.

5. Additional feedback? We value your feedback and use it to improve the quality of our training webinars over time.

6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!

Agenda

1. Intro
2. Advanced Search
3. Step by step
4. Examples
5. Tips
6. Smart Send
7. Q&A
8. Close



Advanced Search

Advanced Search

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

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			

When to use Advanced Search

1. You want to use data to target contacts
2. You don't want to send to ALL members of a program or group
3. You want to send at a specific time / date
4. Examples
 1. Text all contacts in Philadelphia
 2. Text all Chemistry & Biology majors with a 3.0 or higher



FASFA Alert!

We need to remind students who have started but not completed their FAFSFA that the deadline is coming up.

- Fasfa_completed = FALSE
- Fasfa_started = TRUE



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Advanced Search

Match if All rules are met

Rule #1 [\(rename rule\)](#) [\(delete rule\)](#)

If All of the following conditions are met

FAFSA Completed	equals	False	✗
Fafsa Submitted	equals	True	✗

[+ add another condition](#)

[+ add another rule](#)

Cancel
Search

Using "All" vs. "Any" in Your Search

- All: narrows down more, serves as an AND function.
- Any: broadens your search, serves as an OR function.



Scholarship Alert!

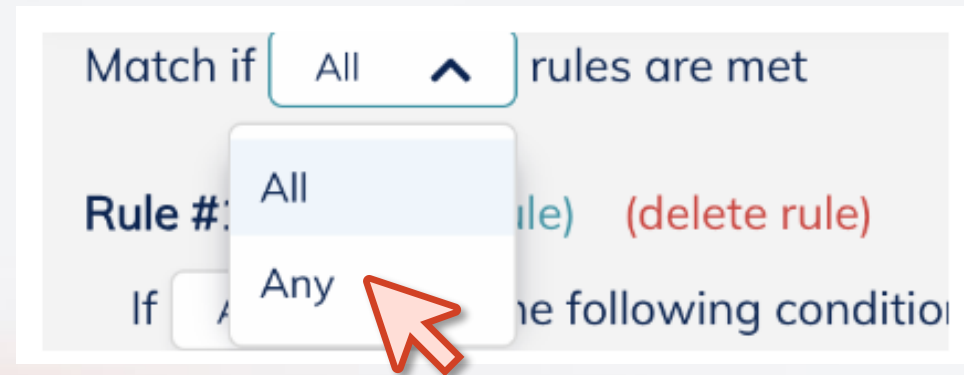
We have a new scholarship that is available to instate students with a high school GPA or 3.0 or higher. It is ALSO available to out of state students with a high school GPA of 3.5 or higher.

- Rule #1

- In_state = FALSE
- GPA > 3.0

- Rule #2

- In_state = TRUE
- GPA > 3.5



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](#)

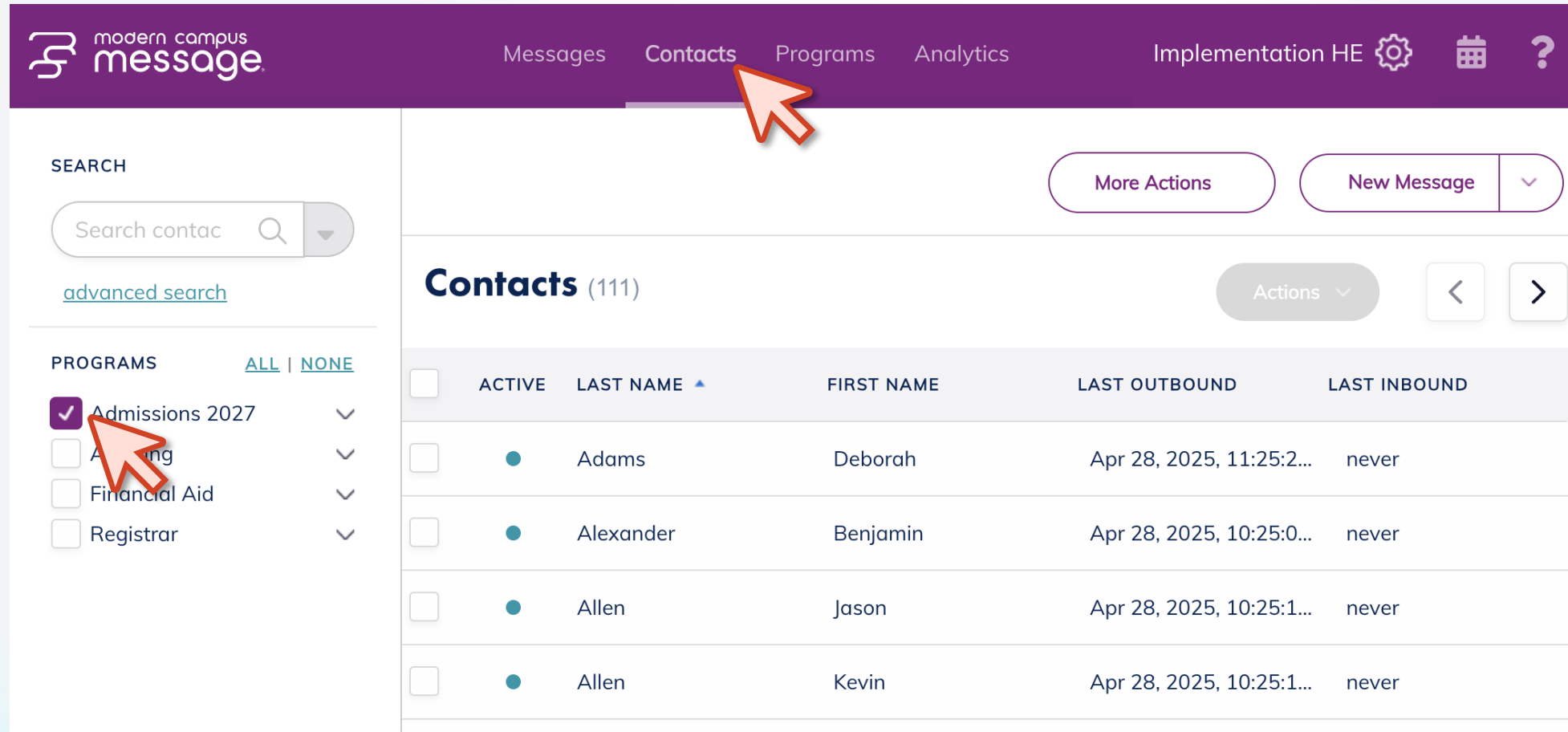
[+ add another rule](#)

Cancel

Search

Advanced Search Step-By- Step

Contacts tab and select your program



The screenshot shows the Modern Campus Message interface. The top navigation bar is purple and contains the following tabs: Messages, **Contacts** (highlighted with an orange arrow), Programs, and Analytics. To the right of the tabs are links for Implementation HE, a settings gear icon, a calendar icon, and a help icon. Below the navigation bar, the left sidebar contains a search bar with the text "Search contac" and a dropdown arrow, a link to "advanced search", and a "PROGRAMS" section with links for "ALL" and "NONE". Under "PROGRAMS", there is a list of programs with checkboxes: "Admissions 2027" (checked, highlighted with an orange arrow), "Admissions 2028", "Financial Aid", and "Registrar". The main content area displays the "Contacts" tab with a count of "(111)". It includes buttons for "More Actions" and "New Message", and a table of contacts. The table has columns for "ACTIVE", "LAST NAME", "FIRST NAME", "LAST OUTBOUND", and "LAST INBOUND". The first four rows of the table are visible, showing contacts with last names Adams, Alexander, Allen, and Allen.

ACTIVE	LAST NAME	FIRST NAME	LAST OUTBOUND	LAST INBOUND
<input type="checkbox"/>	Adams	Deborah	Apr 28, 2025, 11:25:2...	never
<input type="checkbox"/>	Alexander	Benjamin	Apr 28, 2025, 10:25:0...	never
<input type="checkbox"/>	Allen	Jason	Apr 28, 2025, 10:25:1...	never
<input type="checkbox"/>	Allen	Kevin	Apr 28, 2025, 10:25:1...	never

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Select “advanced search”

The screenshot shows the Modern Campus Message interface. The top navigation bar includes 'Messages', 'Contacts' (selected), 'Programs', and 'Analytics'. On the right of the bar are links for 'Implementation HE', a settings gear, a calendar, and a help icon. The left sidebar contains a 'SEARCH' section with a search bar and a link to 'advanced search' (highlighted with a red arrow). Below the search bar is a 'PROGRAMS' section with a list of programs: 'Admissions 2027' (checked), 'Advising', 'Financial Aid', and 'Registrar'. The main content area displays a 'Contacts (111)' list with columns for 'ACTIVE', 'LAST NAME', 'FIRST NAME', 'LAST OUTBOUND', and 'LAST INBOUND'. The list shows five contacts: Adams, Alexander, Allen, Jason, and Kevin.

SEARCH

Search contac

[advanced search](#)

PROGRAMS

☒ Admissions 2027

☐ Advising

☐ Financial Aid

☐ Registrar

Contacts (111)

Actions

ACTIVE	LAST NAME	FIRST NAME	LAST OUTBOUND	LAST INBOUND
<input type="checkbox"/>	Adams	Deborah	Apr 28, 2025, 11:25:2...	never
<input type="checkbox"/>	Alexander	Benjamin	Apr 28, 2025, 10:25:0...	never
<input type="checkbox"/>	Allen	Jason	Apr 28, 2025, 10:25:1...	never
<input type="checkbox"/>	Allen	Kevin	Apr 28, 2025, 10:25:1...	never

Select “Add condition”

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Advanced Search ×

Match if All ▼ rules are met

Rule #1 [\(rename rule\)](#) [\(delete rule\)](#)

If All ▼ of the following conditions are met

[+ add condition](#)

[+ add another rule](#)

⚠ All conditions must be filled out to continue.

Cancel Search

Select your criteria

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SEARCH

More Actions

New Message

Advanced Search

Match if

All

rules are met

Rule #1

(rename rule)

(delete rule)

If

All

of the following conditions are met

HS GPA

^

is greater than or equal to

1

3.0

Clear

×

+ add

CONTACT ATTRIBUTES

active

App Completed

App Status

Application Submitted

Application Waiver

bulk_send

Bulk Text List

campaign

Cancel

Search

Bautista	Ian	Aug 13, 2021, 1:32:07 ...	never
Bentley	Lizeth	Oct 19, 2022, 9:00:10 ...	never
Bishop	Rudy	Dec 7, 2022, 2:30:02 P...	Oct 30, 2020, 3:59:44
Blankenship	Lamar	May 18, 2023, 10:00:4...	never

Rename (optional)

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Advanced Search ×

Match if All ▼ rules are met

GPA > 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 ×

[+ add another condition](#)

[+ add another rule](#)

Cancel Search

Add additional rules or criteria (optional)

SEARCH

More Actions New Message

Advanced Search

Match if Any rules are met

GPA > 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 ×

[+ add another condition](#)

Financial Aid (rename rule) (delete rule)

If All of the following conditions are met

fin_aid equals True ×

[+ add another condition](#)

[+ add another rule](#)

Cancel Search

Search

SEARCH

More Actions New Message

Advanced Search

Match if Any rules are met

GPA > 3.0 [\(rename rule\)](#) [\(delete rule\)](#)

If All of the following conditions are met

HS GPA is greater than or equal 1 3.0 Clear ×

+ add another condition

Financial Aid [\(rename rule\)](#) [\(delete rule\)](#)

If All of the following conditions are met

fin_aid equals True ×

+ add another condition

+ add another rule

Cancel Search

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Select the dropdown arrow on “New Message” and “Send to current results”

The screenshot shows the Modern Campus Message interface. On the left is a sidebar with search filters. The main area is titled 'Contacts (89)' and contains a table of contact information. At the top right of the main area, there are two buttons: 'More Actions' and 'New Message'. The 'New Message' button has a small dropdown arrow. A red arrow points to this arrow. Below the 'New Message' button, there is a button labeled 'Send to current results', also with a red arrow pointing to it.

SEARCH

Search contac

any of these rules:

GPA > 3.0

Financial Aid

[add or edit rules](#) [clear all](#)

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

- ☐ Admissions 2027
- ☒ Advising
- ☐ Financial Aid
- ☐ Registrar

Contacts (89)

<input type="checkbox"/>	ACTIVE	LAST NAME	FIRST NAME	LAST OUTBOUND	LAST INBOUND
<input type="checkbox"/>	●	Acosta	Nora	Oct 26, 2023, 12:56:2...	never
<input type="checkbox"/>	●	Andrews	Donald	Dec 7, 2022, 11:30:01 ...	never
<input type="checkbox"/>	●	Arroyo	Gillian	May 18, 2023, 10:00:0...	Oct 30, 2020, 3:59:45 ...
<input type="checkbox"/>	●	Ayala	Jocelynn	Oct 19, 2022, 9:00:10 ...	Oct 30, 2020, 3:59:44 ...
<input type="checkbox"/>	●	Bautista	Ian	Aug 13, 2021, 1:32:07	never

Compose and send or schedule your message

ARCH

Search contacts

Any of these rules:

GPA > 3.0

Financial Aid

add or edit rules

clear all

PROGRAMS

ALL | NONE

Admissions 2027

Advising

Financial Aid

Registrar

New Message

×

Send from:

Advising

Send to: 89 contacts

clear criteria

Query results as of May 7, 2025, 10:21:50 AM

Program is Advising

Any of these rules: GPA > 3.0, Financial Aid

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

Advanced Search Examples

Contact Segmentation

25

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

GPA > 3.0



Application = complete

Attended = true

FAFSA = Not complete

All – contacts must meet all conditions and rules

Send a follow up message to encourage FAFSA completion.

- **ALL**
- **Rule #1**
 - fafsfa_submitted = TRUE
 - fafsfa_completed = FALSE

Send a reminder to complete application.

- **ALL**
- **Rule #1**
 - app_submitted = TRUE
 - app_completed = FALSE
 - hs_grad_year = 2025

Any – contacts must only meet 1 condition or rule

Send a message to graduating classes 2010-2015.

- **ANY**
- **Rule #1**
 - grad_class = 2010
 - grad_class = 2011
 - grad_class = 2012
 - grad_class = 2013
 - grad_class = 2014
 - grad_class = 2015

Send a message to all business majors and all pre-law majors.

- **ANY**
- **Rule #1**
 - major = Prelaw
 - major = Business

Any – contacts must only meet 1 condition or rule

Send a message to contacts graduating in the spring or summer.

- ANY
- Rule #1
 - grad_date = summer25
 - grad_date = spring25

Send a message to contacts graduating in the spring or summer **and live on campus**

- ANY
- Rule #1
 - grad_date = summer25
 - resident = TRUE

- Rule #2
 - grad_date = summer25
 - resident = TRUE

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

Message Demo







-

Advanced Search Tips

Know your data


Manage Fields for Admissions 2027

Add Custom Field

	DISPLAY NAME	TYPE	VARIABLE NAME	HIDDEN	READONLY	EDIT
☰	App Status	String	app_status	<input type="radio"/>	<input checked="" type="radio"/>	
☰	Application Su...	Maybe (Boole...	app_submitted	<input type="radio"/>	<input checked="" type="radio"/>	
☰	Application W...	Maybe (Boole...	application_w...	<input type="radio"/>	<input type="radio"/>	
☰	middle_school	String	middle_school	<input type="radio"/>	<input type="radio"/>	
☰	nickname	String	nickname	<input type="radio"/>	<input type="radio"/>	
☰	Scholarship	Maybe (Boole...	scholarship	<input type="radio"/>	<input type="radio"/>	

Start from the contacts tab

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Messages
Contacts
Programs
Analytics

SEARCH

Search contac

[advanced search](#)

PROGRAMS
ALL | NONE

☒ Admissions 2027

☐ Advising

☐ Financial Aid

☐ Registrar

Contacts (111)

<input type="checkbox"/>	ACTIVE	LAST NAME ▲	FIRST NAME
<input type="checkbox"/>	●	Adams	Deborah
<input type="checkbox"/>	●	Alexander	Benjamin

Name your rules

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Advanced Search

Match if All rules are met

Out of state, 3.0 GPA (submit) (cancel)

If All of the following conditions are met

In State equals False

HS GPA is greater than or equal to 3 Clear

+ add another condition



Rule #1 (rename rule) (delete rule)


If All of the following conditions are met

In State equals True


Can I save this search for future use?


SEARCH


Search contacts  

 [Save This Search](#)

My Saved Searches

[accounting 2024](#) 

[may 21 test](#) 

Save Search Criteria 

Enter a name for this search

[Cancel](#) [Save Search](#)

Message Demo

- Name a rule
- Save a search
- Access a saved search

Advanced Search Troubleshooting

Why is my search not narrowing down contacts?

- Make sure to hit the right button!

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×

New Message

Send from:

Select a program

▼

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



New Message ×

Send from:

Advising ▼

Send to: 89 contacts [clear criteria](#)

Query results as of May 7, 2023, 10:21:50 AM

Program is Advising

Any of these rules: GPA > 3.0, Financial Aid

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

Why is my search not showing any contacts?

SEARCH

all of these rules:

Rule #1

Rule #2

[add or edit rules](#) [clear all](#)

PROGRAMS

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


☒ Admissions 2027

☐ Advising



☐ Financial Aid

☐ Registrar

More Actions

New Message 

Contacts (0)

 ACTIVE LAST NAME 

FIRST NAME

LAST OUTBOUND

LAST INBOUND

Why can't I hit the Search button in my advanced search?

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

If Any of the following conditions are met

admit_term	equals	fall 2024	✗
admit_term	equals	summer 2024	✗
Select attribute			✗

[+ add another condition](#)

Rule #2 [\(rename rule\)](#) [\(delete rule\)](#)

If All of the following conditions are met

[+ add condition](#)

[+ add another rule](#)

⚠ All conditions must be filled out to continue.

Cancel Search

Message Demo

- Show hitting the “new message” instead of dropdown
- Show accidentally having “All” instead of “Any”
- Show an incomplete criteria that prevents search

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

Match: ☒ Smart Send ☐ Current Matches

Next

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

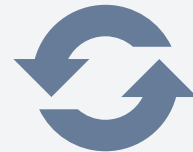
Search

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Schedule Date
Today, April 3

Anthony Moves
April 10

Send Date
May 3



Data Update

Anthony is in
Boston and meets
the criteria

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

More Actions

New Message



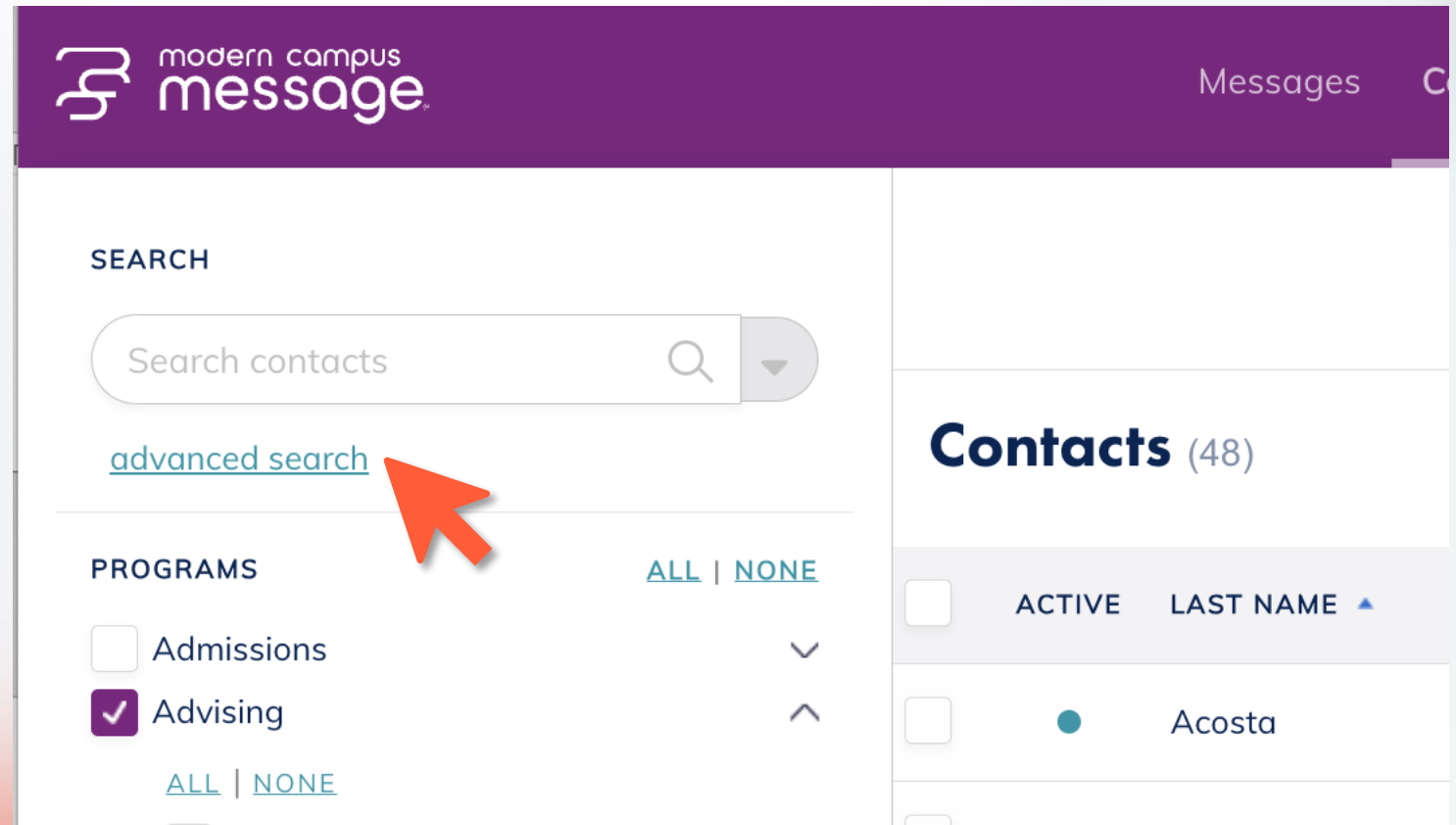
Send to current results



Using Advanced Search

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

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

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The screenshot displays the Modern Campus Message application interface. The top navigation bar is purple and contains the 'modern campus message' logo, along with links for Messages, Contacts, Programs, Analytics, and Implementation HE, followed by icons for settings, calendar, and help. The main content area has a white background and is divided into sections. On the left, there is a 'SEARCH' section with a search bar, a filter 'active equals true', and links for 'add or edit criteria' and 'clear all'. Below this is a 'FOLDERS' section. The central part of the interface shows an 'Inbox' tab with a table of messages. The first message is from 'Alfonso Larson' dated '10/30/20' with the subject 'ADVISING'. To the right of the inbox, there is a 'New Message' button with a dropdown arrow. 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

Alfonso Larson

10/30/20

ADVISING

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

Send to: Smart Send (239 currently matching contacts)

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

Message:

First Name

, make sure you schedule your co-op interviews!

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

Advanced Search results.

Using “Send to Current Results”

The screenshot shows the Modern Campus Message interface. The top navigation bar includes 'Messages', 'Contacts' (selected), 'Programs', 'Analytics', 'Implementation Alumni', and icons for settings, calendar, and help. The left sidebar contains a 'SEARCH' section with a search bar and a link to 'advanced search', and a 'PROGRAMS' section with filters for 'Alumni Relations' and various years (2006, 2008, 2010, 2011, 2015, 2016, 2017, Baltimore, Boston, DC). The main content area displays a list of 'Contacts (48)'. Above the list are buttons for 'More Actions' and 'New Message'. A dropdown menu is open from the 'New Message' button, showing the option 'Send to current results'. The contact list table has columns: 'ACTIVE', 'LAST NAME', 'FIRST NAME', 'LAST OUTBOUND', and 'LAST INBOUND'.

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



Smart Send



Current Matches

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!

Survey Time!

2 minutes! Thank you so much!

* 3. Overall, were you satisfied with your training?

☐ Yes

☐ No

* 4. On the following scale, how **helpful** and **informative** was the training webinar?

1 - Not Helpful

2

3 - Neutral

4

5 - Helpful

☐

☐

☐

☐

☐

Additional comments to reflect your score.

5. Additional feedback? We value your feedback and use it to improve the quality of our training webinars over time.

6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!

Thank You

See you next month!