



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

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- 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

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

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

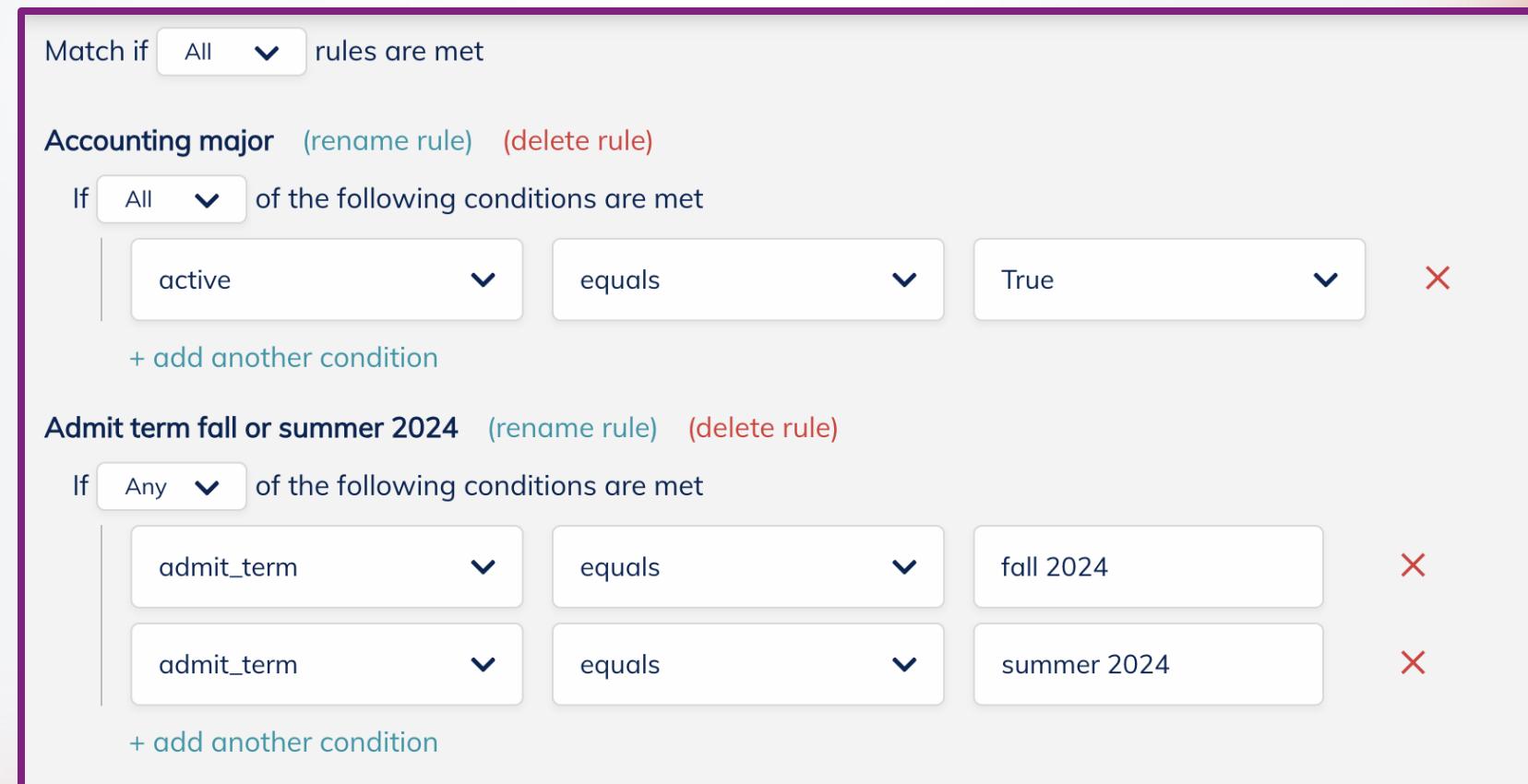
Admit term fall or summer 2024 (rename rule) (delete rule)

If **Any** of the following conditions are met

admit_term equals fall 2024 **X**

admit_term equals summer 2024 **X**

+ add another condition



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`



Advanced Search X

Match if **All** rules are met

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

If **All** of the following conditions are met

FAFSA Completed	equals	False	X
Fafsa Submitted	equals	True	X

[+ add another condition](#)

[+ add another rule](#)

[Cancel](#) Search

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

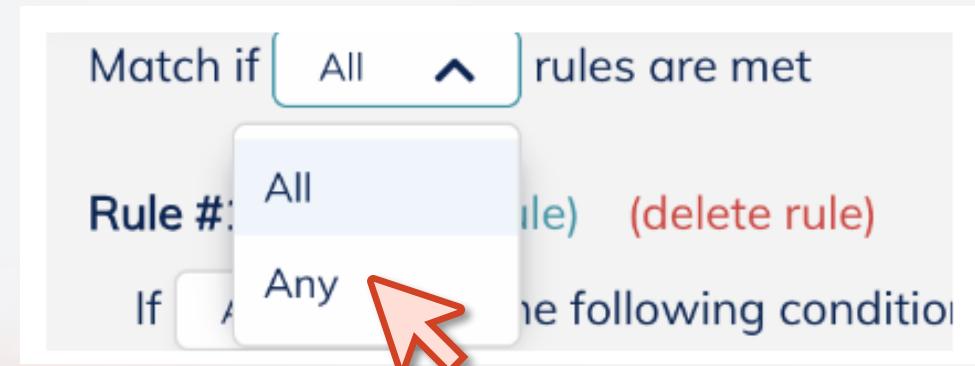
- All: narrows down more, serves as an AND function.
- Any: broadens your search, serves as an OR function.



Scholarship Alert!

We have a new scholarship that is available to instate students with a high school GPA of 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

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

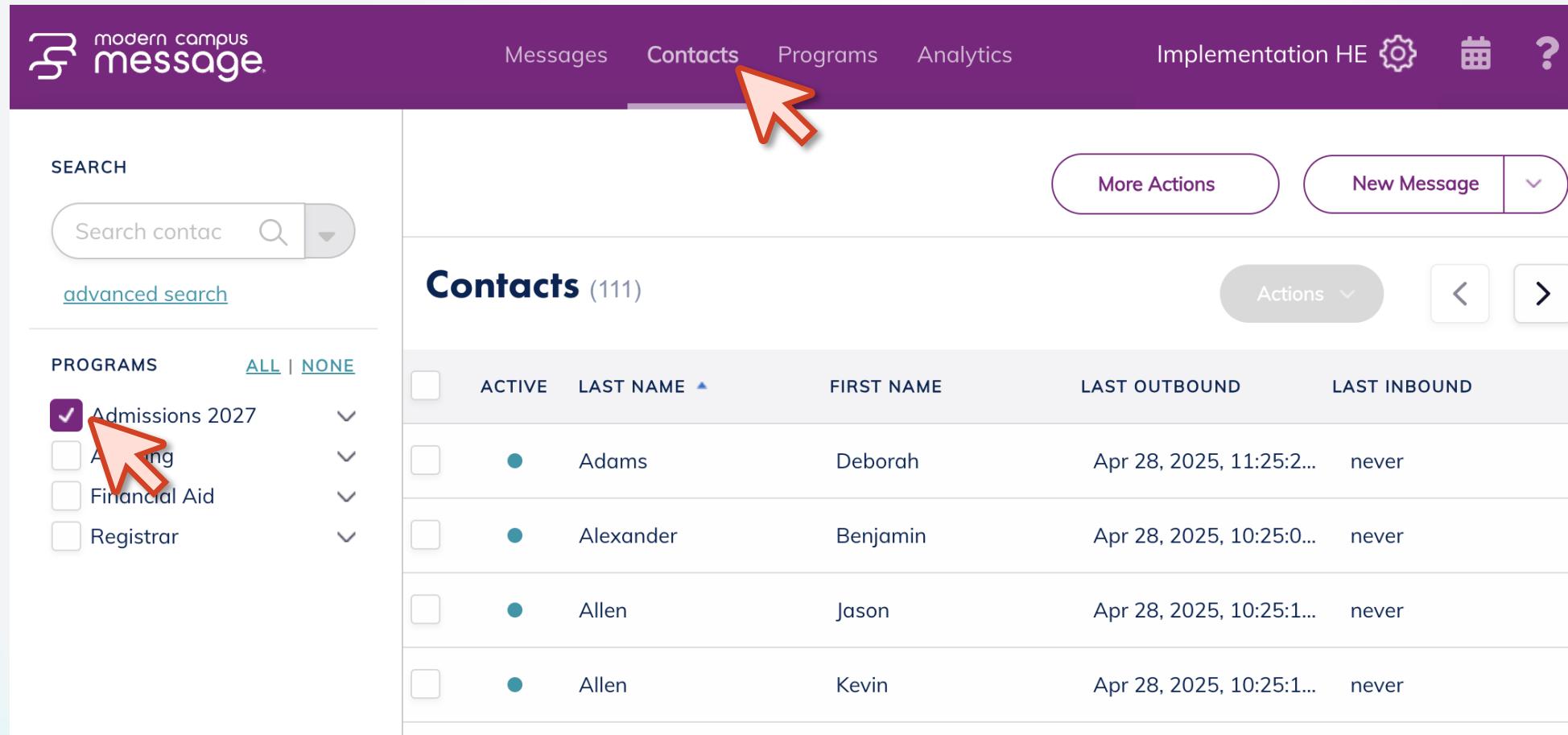
+ add another rule

Cancel

Search

Advanced Search Step-By-Step

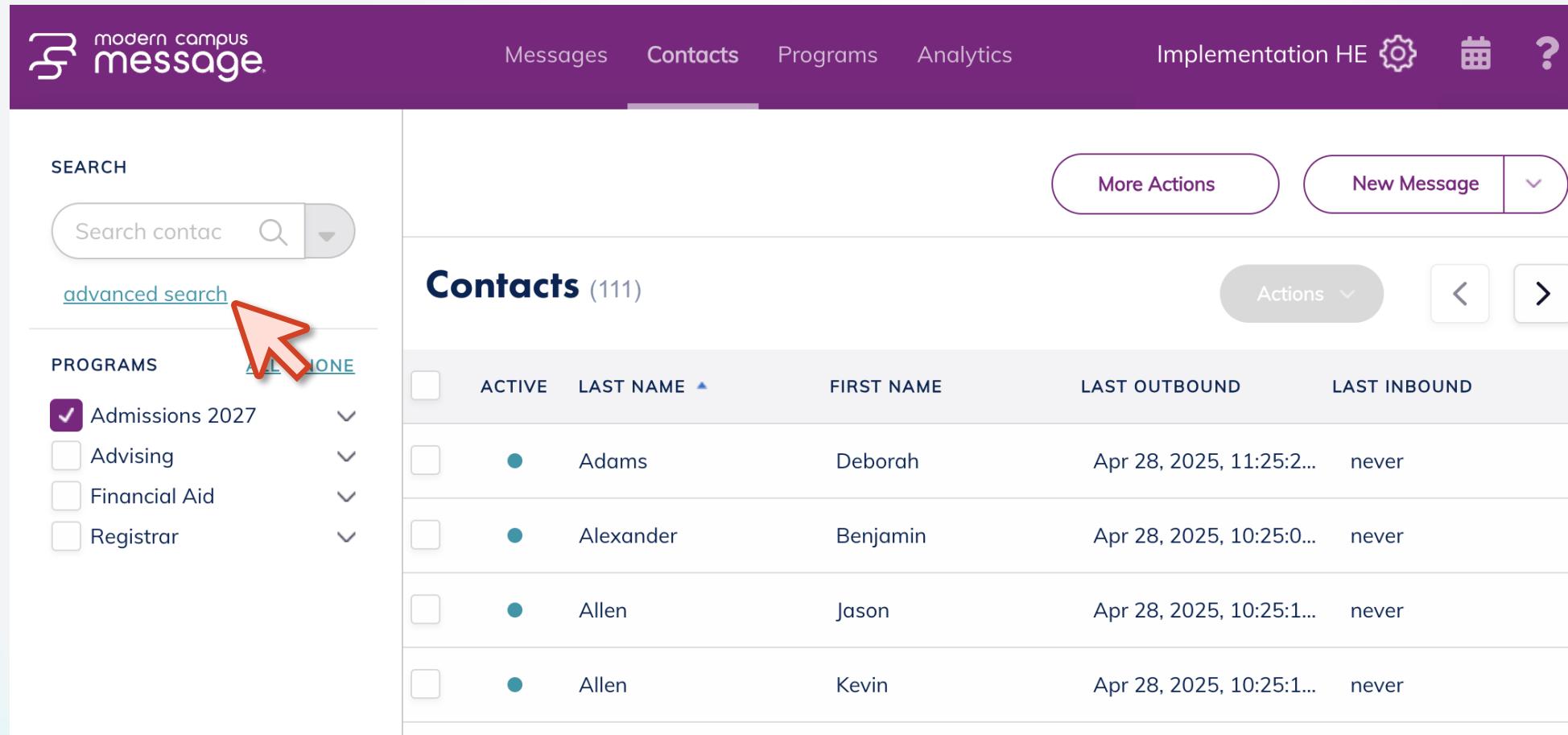
Contacts tab and select your program



The screenshot shows the modern campus message software interface. The top navigation bar includes tabs for Messages, Contacts (which is the active tab, indicated by a red arrow), Programs, Analytics, Implementation HE, and Help. Below the navigation bar is a search section with a search bar and an advanced search link. On the left, a program selection section shows 'ALL | NONE' and a list with 'Admissions 2027' checked (indicated by a red arrow), while 'Admitting', 'Financial Aid', and 'Registrar' are unchecked. The main content area is titled 'Contacts (111)' and displays a table of 11 contacts. The columns are: ACTIVE, LAST NAME (sorted by last name), FIRST NAME, LAST OUTBOUND, and LAST INBOUND. The contacts listed are Adams (Deborah), Alexander (Benjamin), Allen (Jason), and Allen (Kevin), all of whom have never had an outbound message.

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

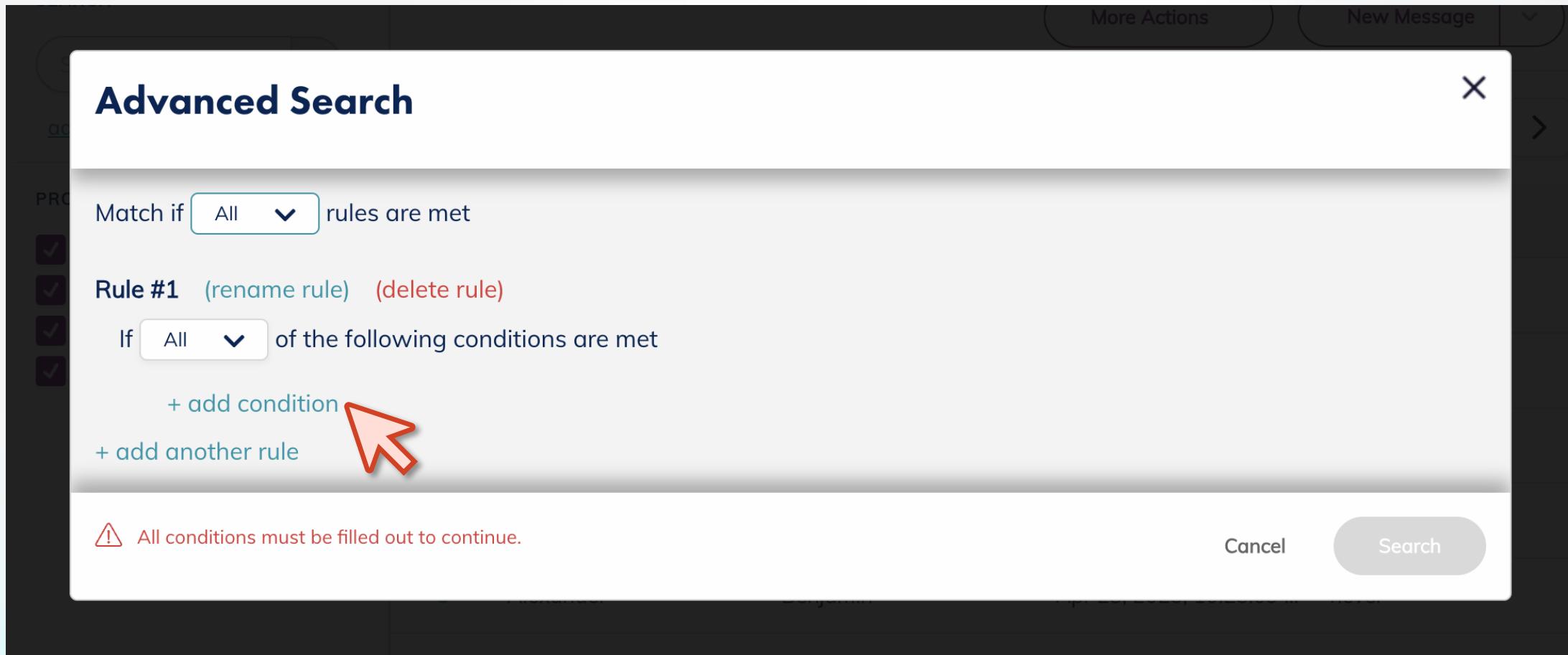
Select “advanced search”



The screenshot shows the modern campus message software interface. The top navigation bar includes links for Messages, Contacts (which is the active tab), Programs, Analytics, Implementation HE, and Help. On the left, there's a sidebar with a search bar, an 'advanced search' button (which is highlighted with a red arrow), and a 'PROGRAMS' section containing checkboxes for '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 four contacts: Deborah Adams, Benjamin Alexander, Jason Allen, and Kevin Allen, all of whom have never had an outbound message.

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”



Select your criteria

SEARCH (More Actions) (New Message) X >

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	3.0	Clear X
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CONTACT ATTRIBUTES

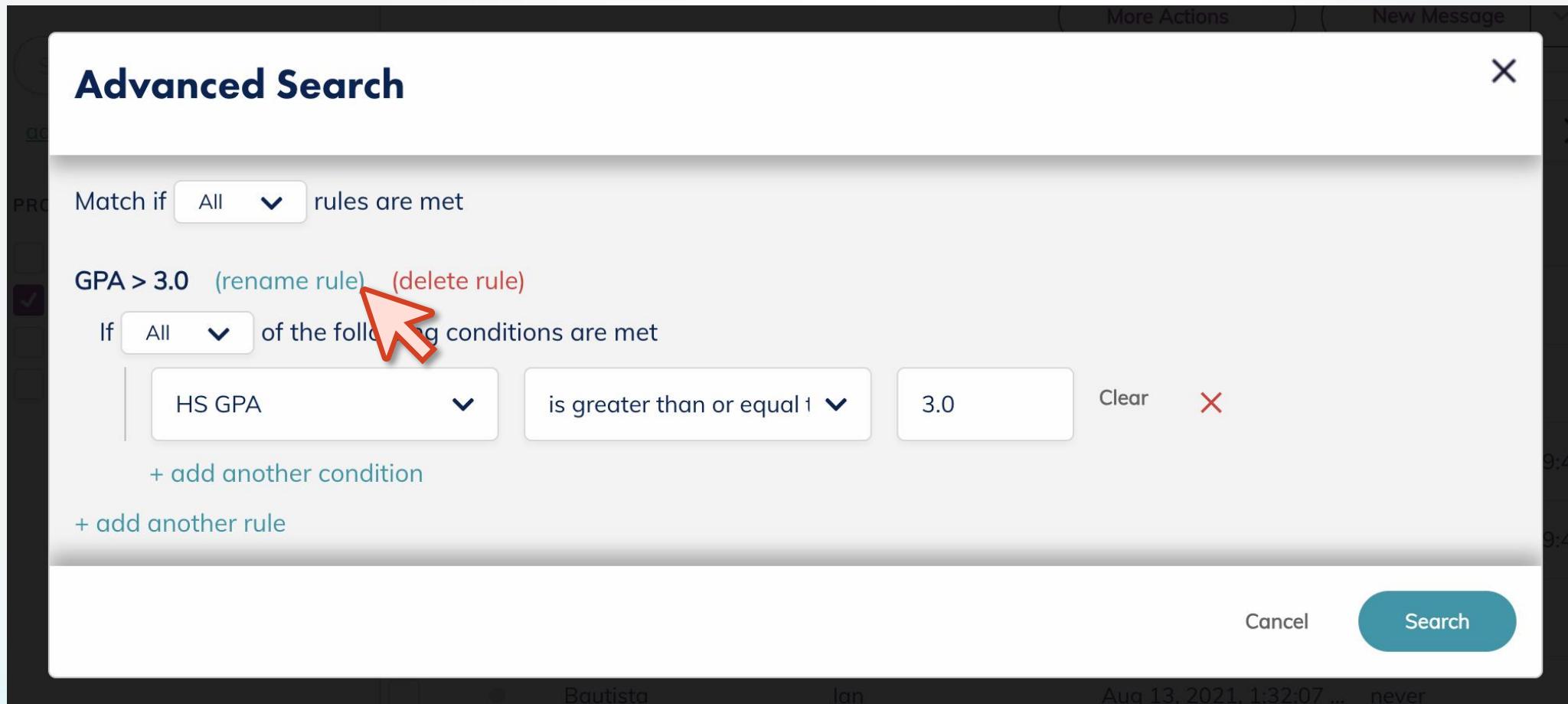
+ add

- active
- App Completed
- App Status
- Application Submitted
- Application Waiver
- bulk_send
- Bulk Text List
- campaign

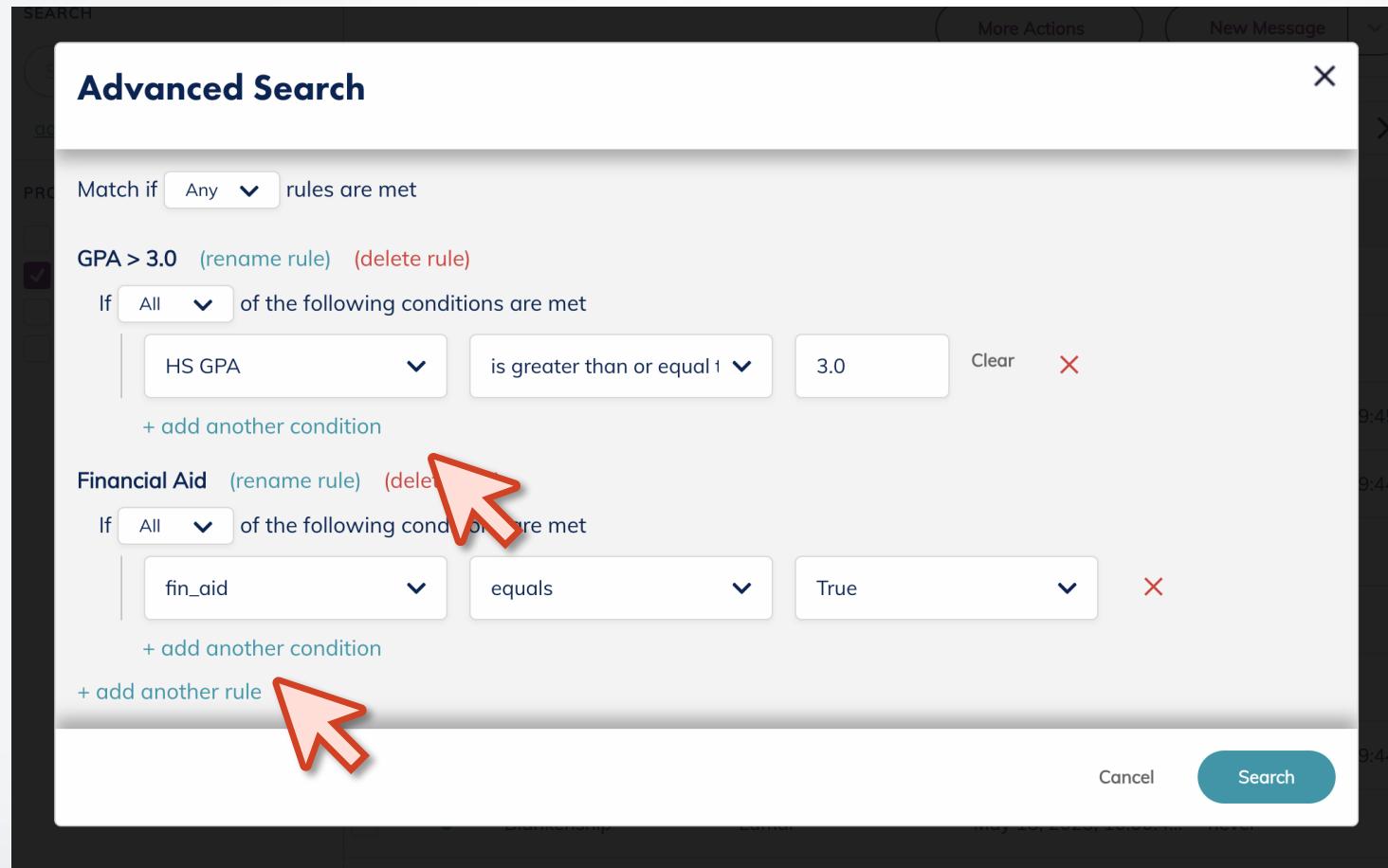
Cancel Search

	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)



Add additional rules or criteria (optional)



Search

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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 **X**

+ add another condition

Financial Aid (rename rule) (delete rule)

If **All** of the following conditions are met

fin_aid equals True **X**

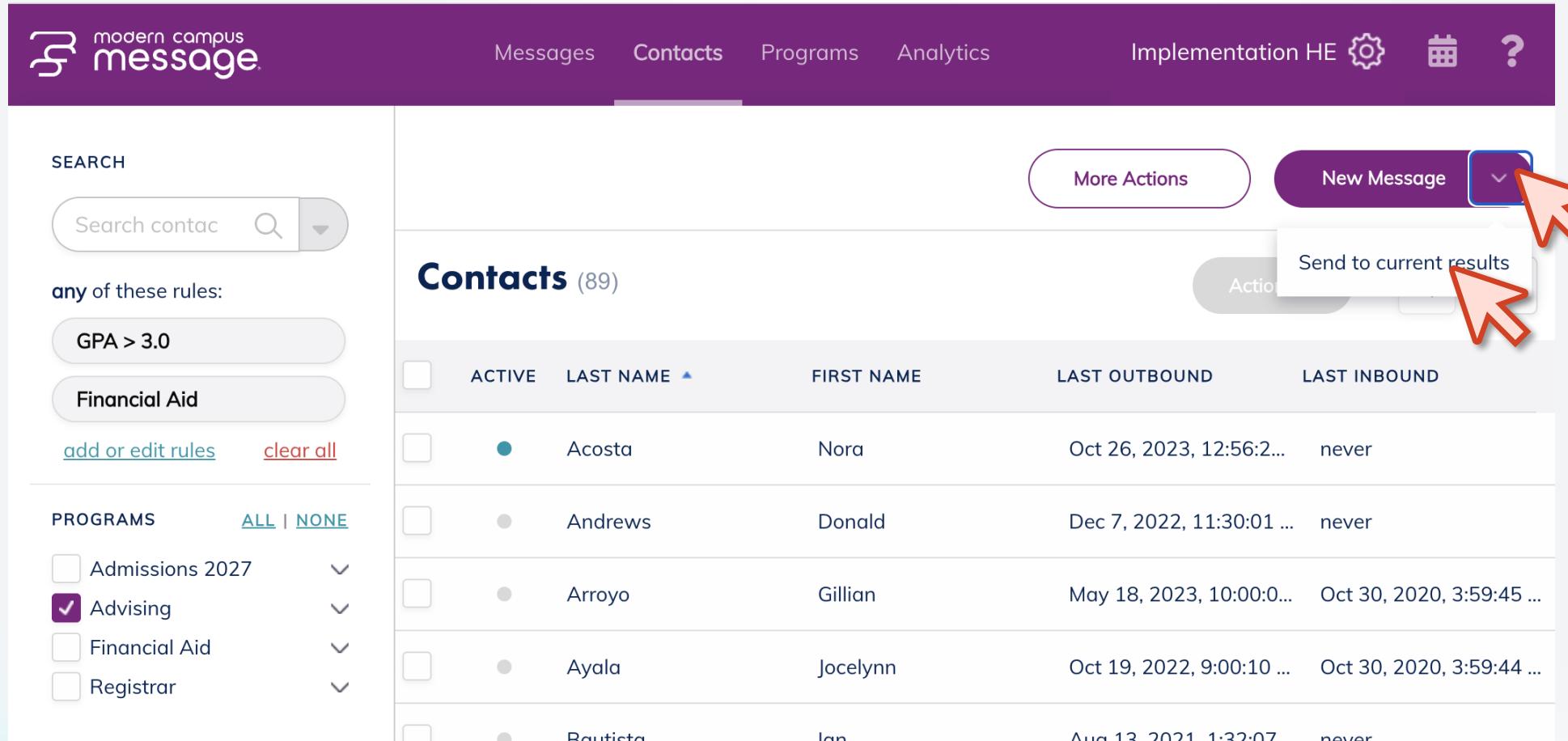
+ add another condition

+ add another rule

Cancel **Search**

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

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The screenshot shows the modern campus message interface. The top navigation bar includes links for Messages, Contacts (which is the active tab), Programs, and Analytics, along with implementation and help options. On the left, there's a search bar, a rule builder section with 'GPA > 3.0' and 'Financial Aid' filters, and a programs section with 'Admissions 2027', 'Advising' (which is checked), 'Financial Aid', and 'Registrar' filters. The main content area displays a list of contacts with columns for Active status, Last Name, First Name, Last Outbound date, and Last Inbound date. A 'More Actions' button and a 'New Message' button with a dropdown arrow are visible. A red arrow points to the dropdown arrow on the 'New Message' button, and another red arrow points to the 'Send to current results' option in the dropdown menu.

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	Ion	Aug 13, 2021, 1:32:07	never

Compose and send or schedule your message

The screenshot shows a 'New Message' dialog box in the foreground, overlaid on a list of messages. The dialog box has a dark header with 'New Message' and a close button. It contains the following fields:

- Send from:** Advising (dropdown menu)
- Send to:** 89 contacts (with a 'clear criteria' link)
- Program:** Advising
- Any of these rules:** GPA > 3.0, Financial Aid
- Message:** (Text area placeholder: Enter your message...)
- Delivery Date:** Now Future Date
- Next** button (disabled)

The background shows a list of messages in a dark-themed interface:

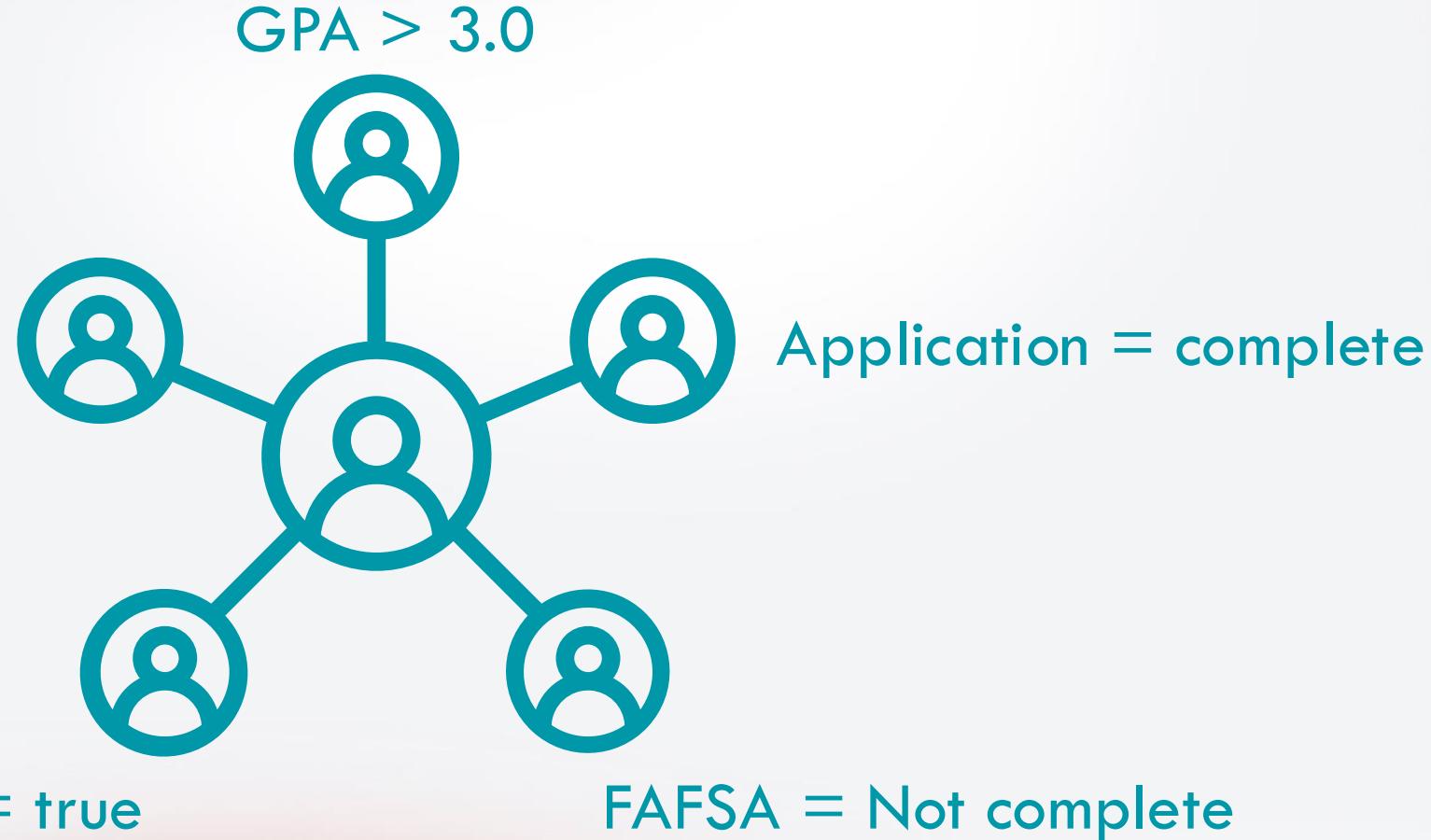
Date	Time	Status
23, 12:56:2...	never	
23, 11:30:01 ...	never	
23, 10:00:0...	Oct 30, 2020, 3:59:45 ...	
23, 9:00:10 ...	Oct 30, 2020, 3:59:44 ...	
23, 1:32:07 ...	never	
23, 9:00:10 ...	never	
23, 2:30:02 P...	Oct 30, 2020, 3:59:44 ...	
23, 10:00:4...	never	
23, 10:00:4...	never	
23, 10:01:1...	Oct 28, 2020, 3:29:30 ...	

Advanced Search Examples

Contact Segmentation

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



All – contacts must meet all conditions and rules

Send a follow up message to encourage FAFSA completion.

- **ALL**
- **Rule #1**
 - `fafsa_submitted = TRUE`
 - `fafsa_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`

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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	●	●	
Application Su...	Maybe (Boole...	app_submitted	●	●	
Application W...	Maybe (Boole...	application_w...	●	●	
middle_school	String	middle_school	●	●	
nickname	String	nickname	●	●	
Scholarship	Maybe (Boole...	scholarship	●	●	

Start from the contacts tab

The screenshot shows the modern campus message application interface. The top navigation bar includes tabs for Messages, Contacts (which is selected and highlighted in blue), Programs, and Analytics. On the left, there is a sidebar with a search bar labeled "Search contact" and a "advanced search" link. Below that, there is a "PROGRAMS" section with a "ALL | NONE" link and a list of programs: "Admissions 2027" (selected, indicated by a checked checkbox), "Advising", "Financial Aid", and "Registrar". The main content area is titled "Contacts (111)". It features a table with columns: "ACTIVE", "LAST NAME ▲", and "FIRST NAME". The table contains two rows of data: one for "Adams" (Deborah) and one for "Alexander" (Benjamin). Each row has an empty checkbox in the "ACTIVE" column and a teal dot in the "LAST NAME" column.

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 2 rules are met

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

If All of the following conditions are met

In State equals False

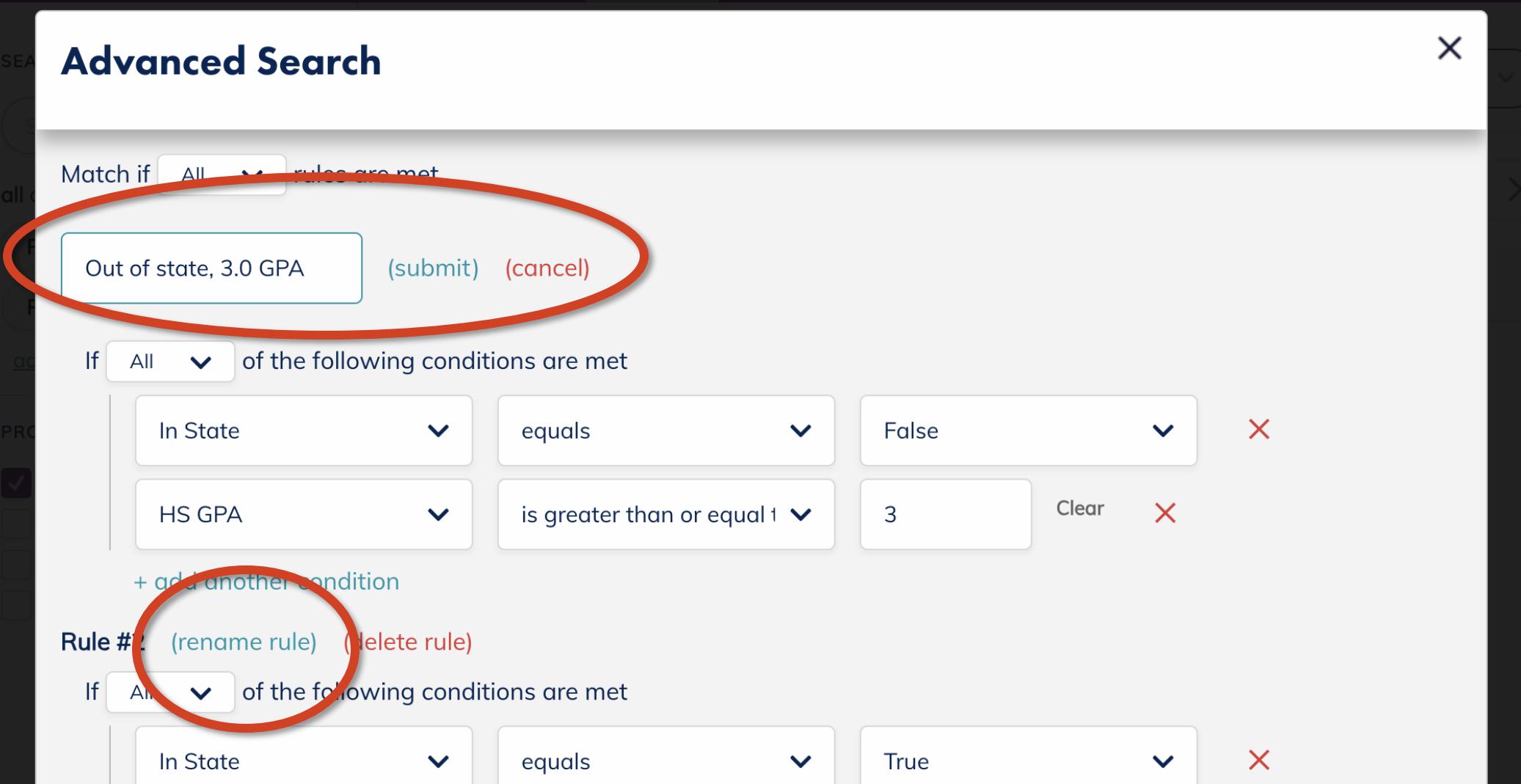
HS GPA is greater than or equal to 3

+ add another condition

Rule #1 (rename rule) (delete rule)

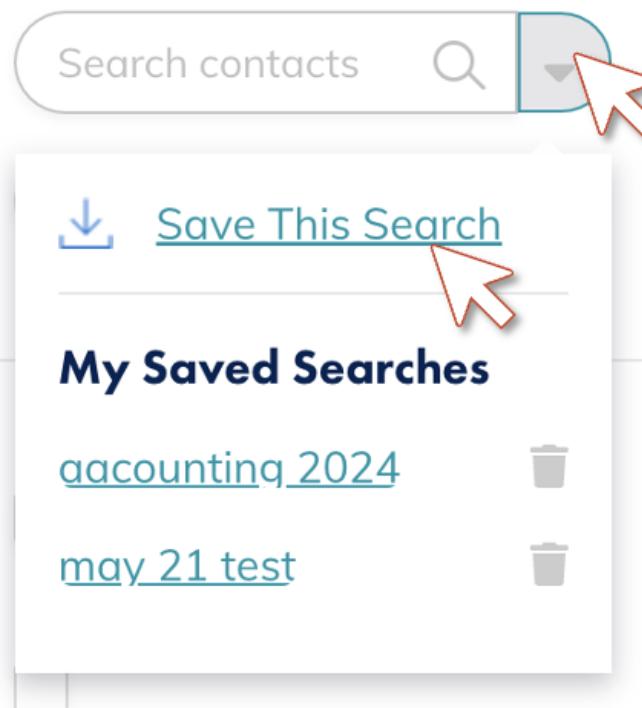
If All of the following conditions are met

In State equals True



Can I save this search for future use?

SEARCH

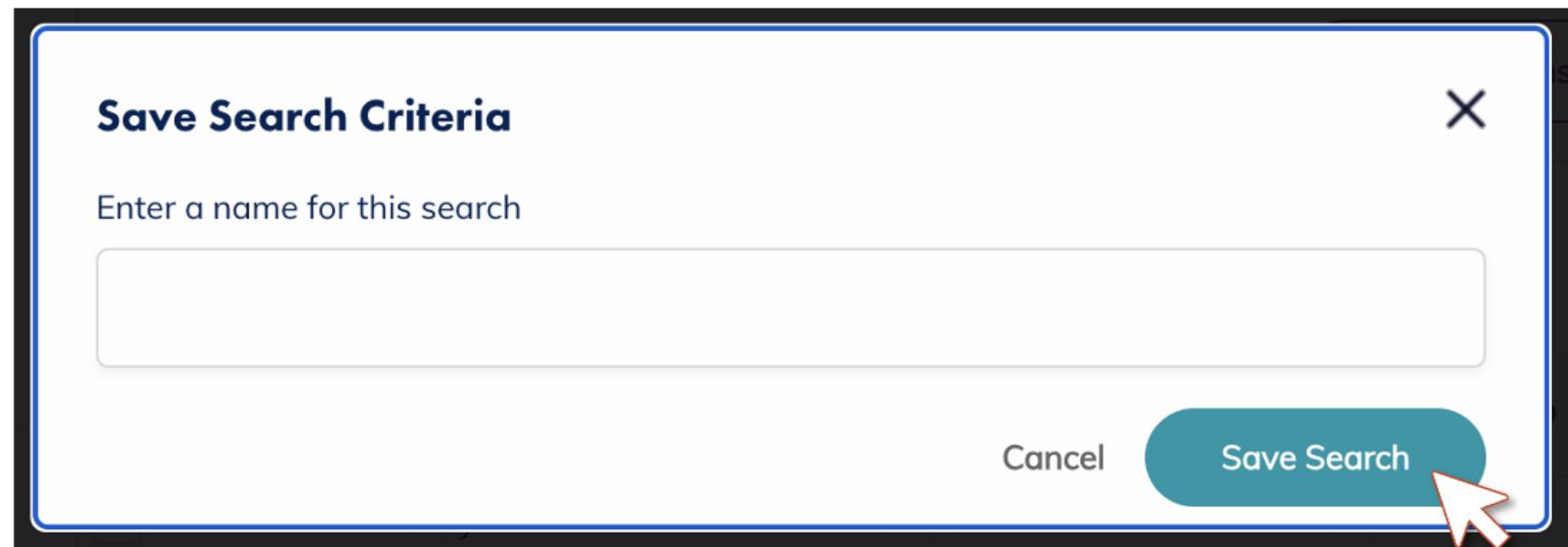


Search contacts 

 [Save This Search](#)

My Saved Searches

- [gaccounting_2024](#) 
- [may 21 test](#) 



Save Search Criteria

Enter a name for this search

 [Cancel](#) 

Message Demo

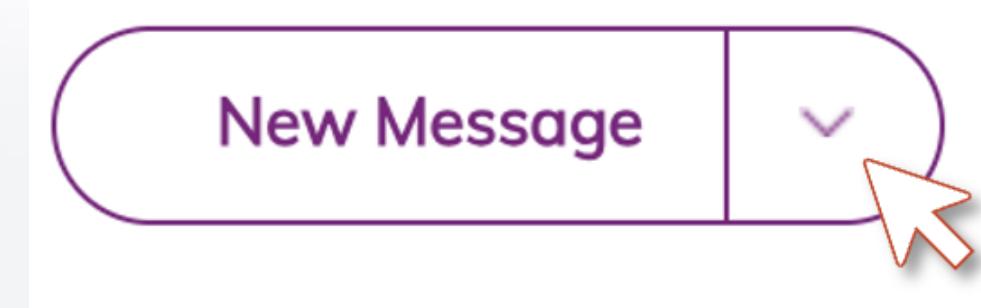
- Name a rule
- Save a search
- Access a saved search

Advanced Search Troubleshooting

Why is my search not narrowing down contacts?

- Make sure to hit the right button!

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New Message X

Send from:
Select a program ▼

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

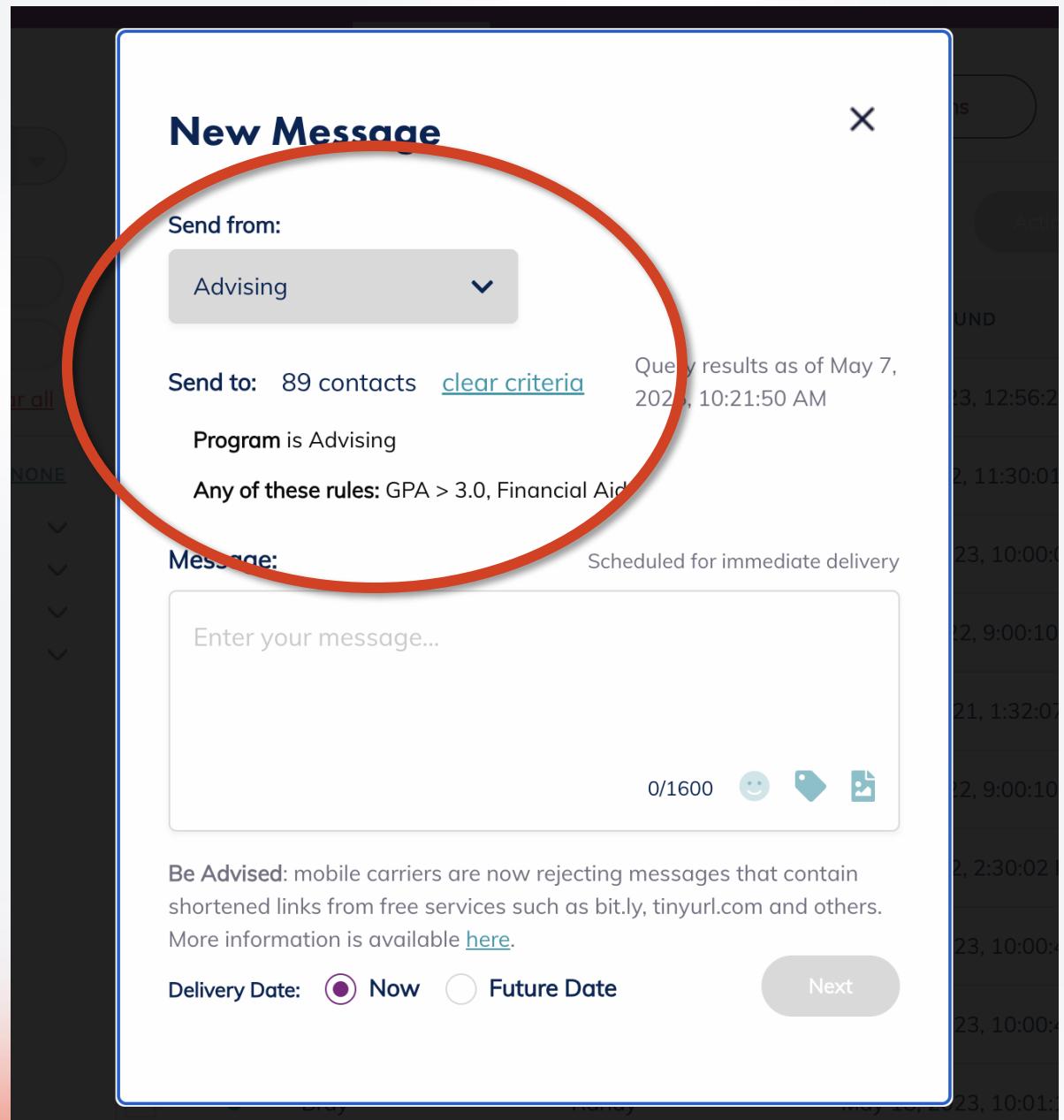
Message: Scheduled for immediate delivery

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



Why is my search not showing any contacts?

SEARCH

Search contacts 

all of these rules:

Rule #1

Rule #2

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

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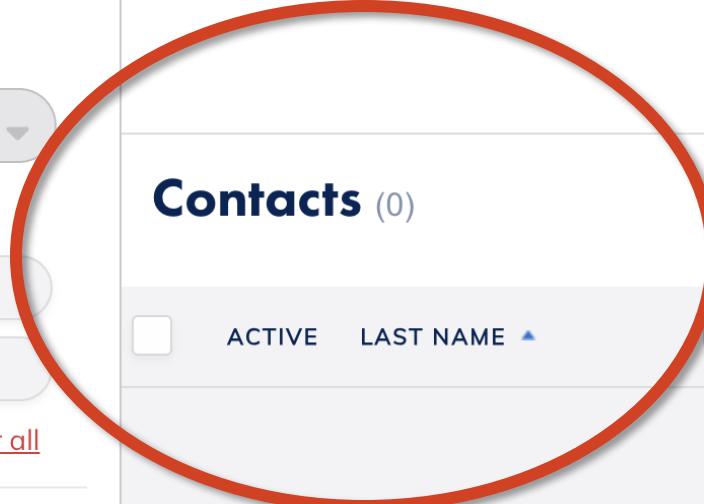
PROGRAMS [ALL | NONE](#)

Admissions 2027 

Advising 

Financial Aid 

Registrar 



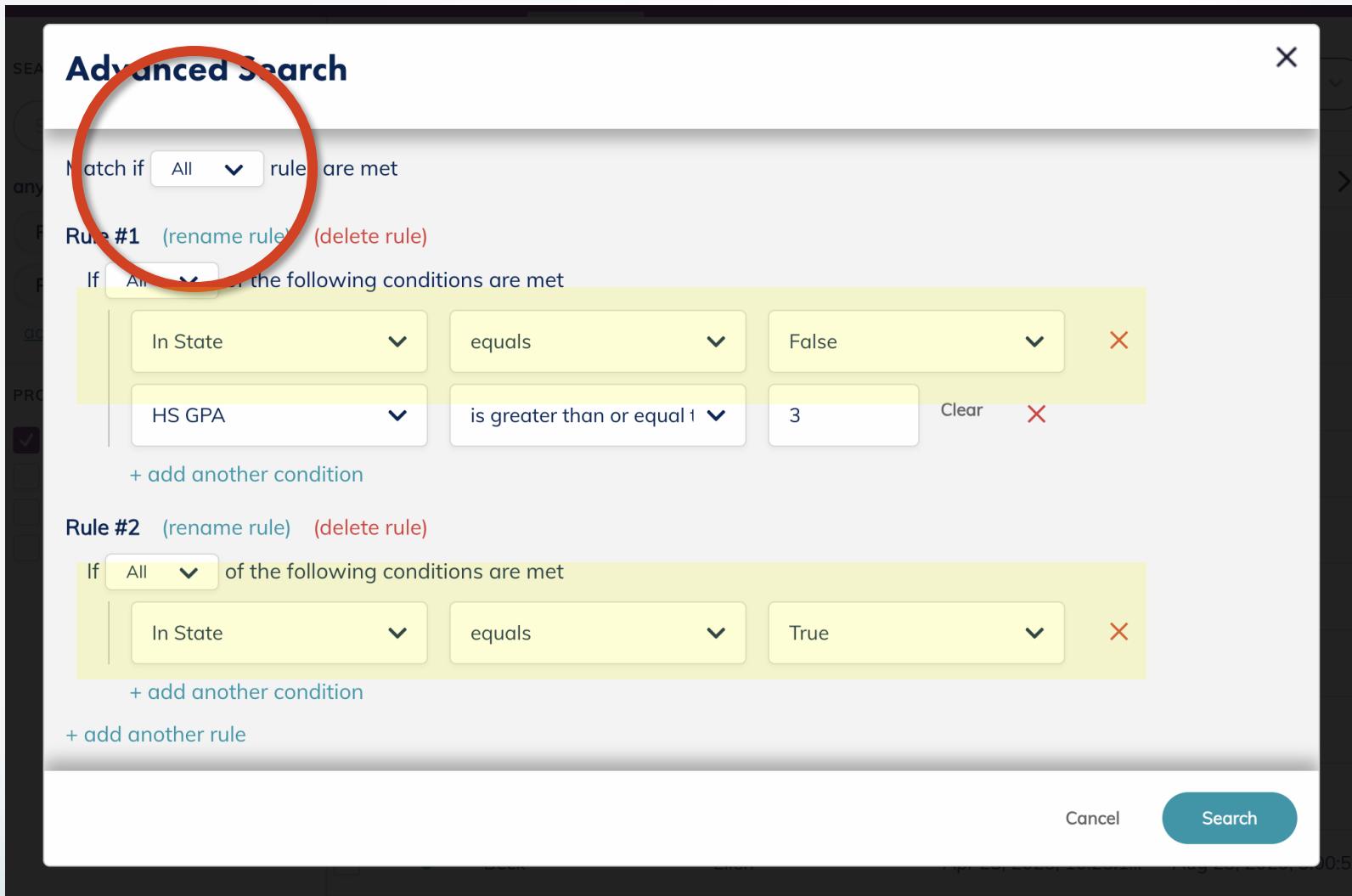
Contacts (0)

ACTIVE LAST NAME ▲ FIRST NAME LAST OUTBOUND LAST INBOUND

More Actions  New Message 

Actions   

Make sure you have the correct “Match if” selected!



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

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

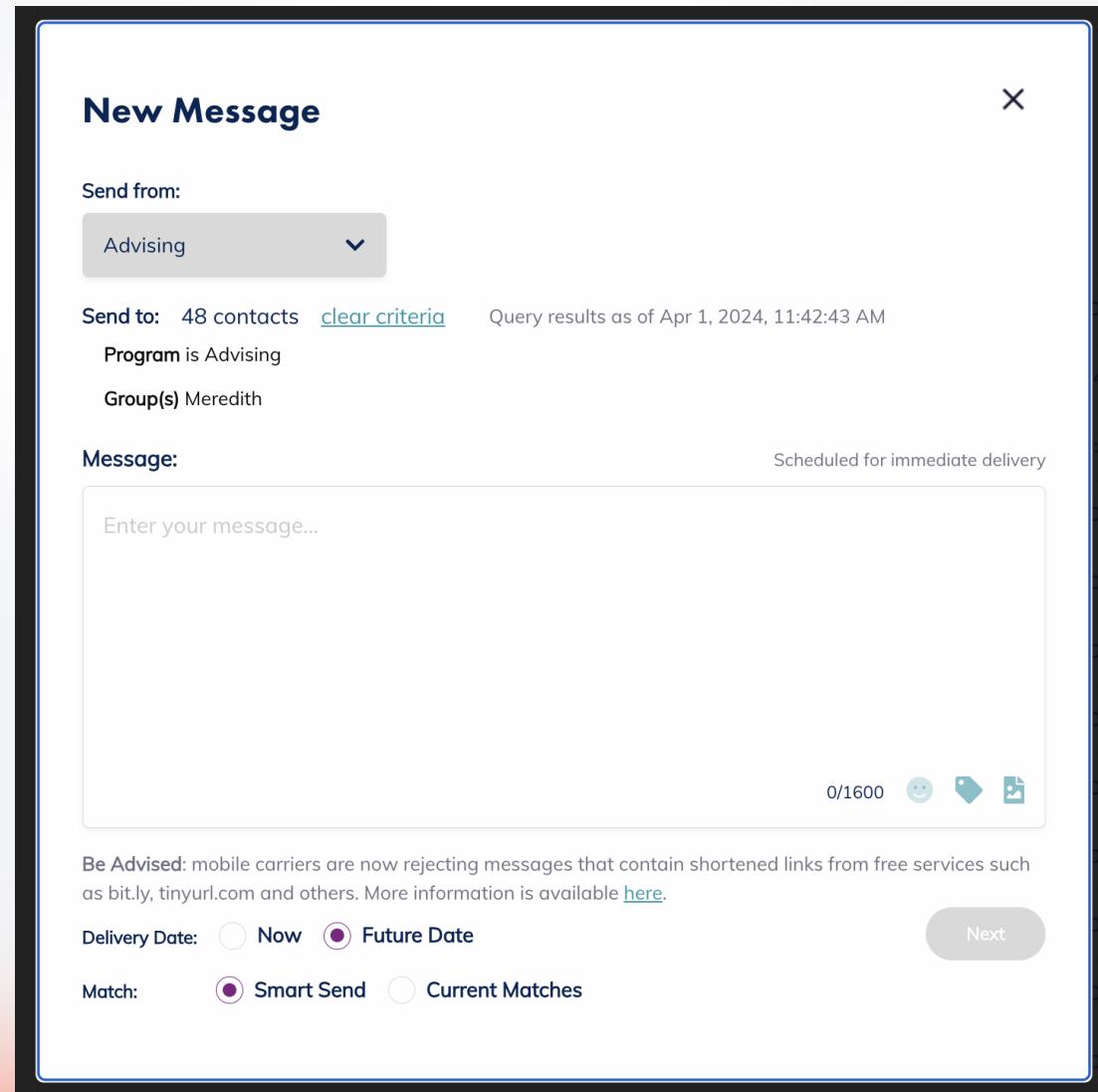
- Show hitting the “new message” instead of dropdown
- Show accidentally having “All” instead of “Any”
- Show an incomplete criteria that prevents search

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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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**.*

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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.

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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 View Moves 1

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.

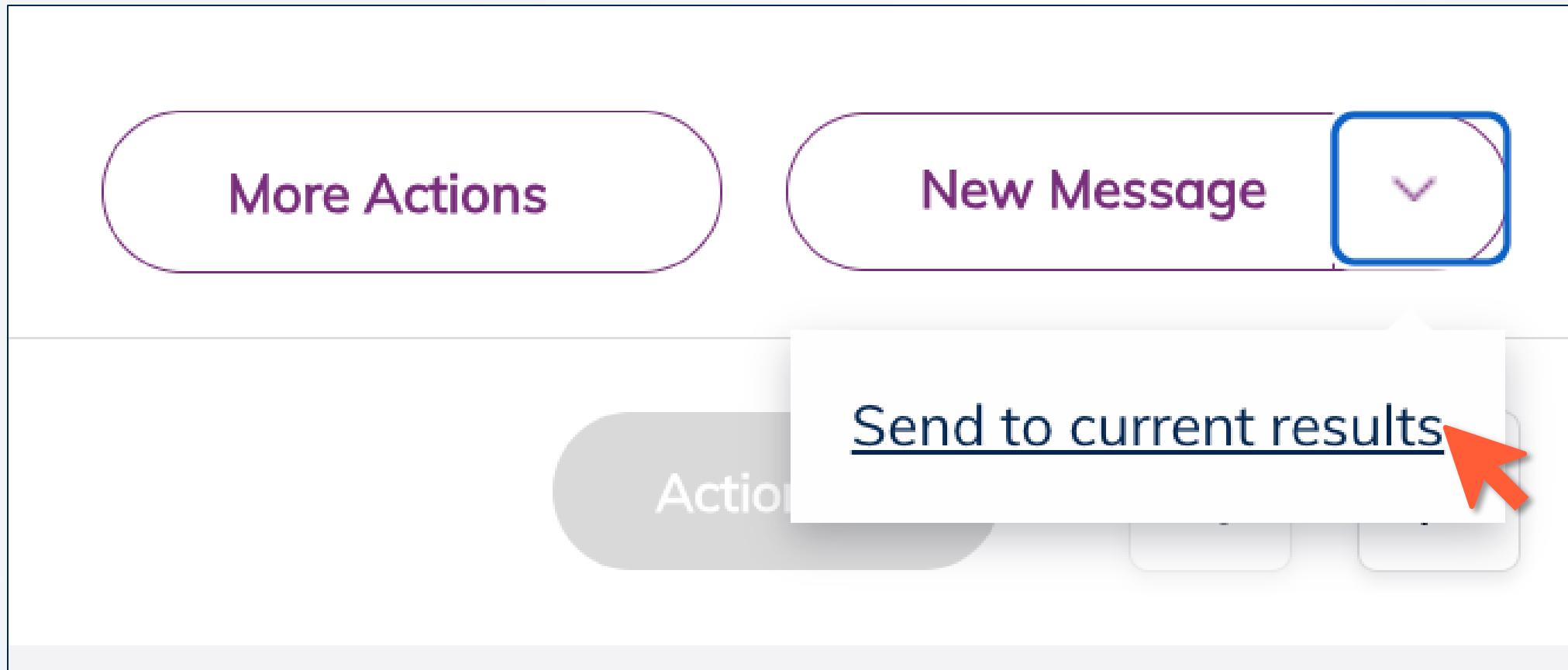
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Smart Send

- 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.



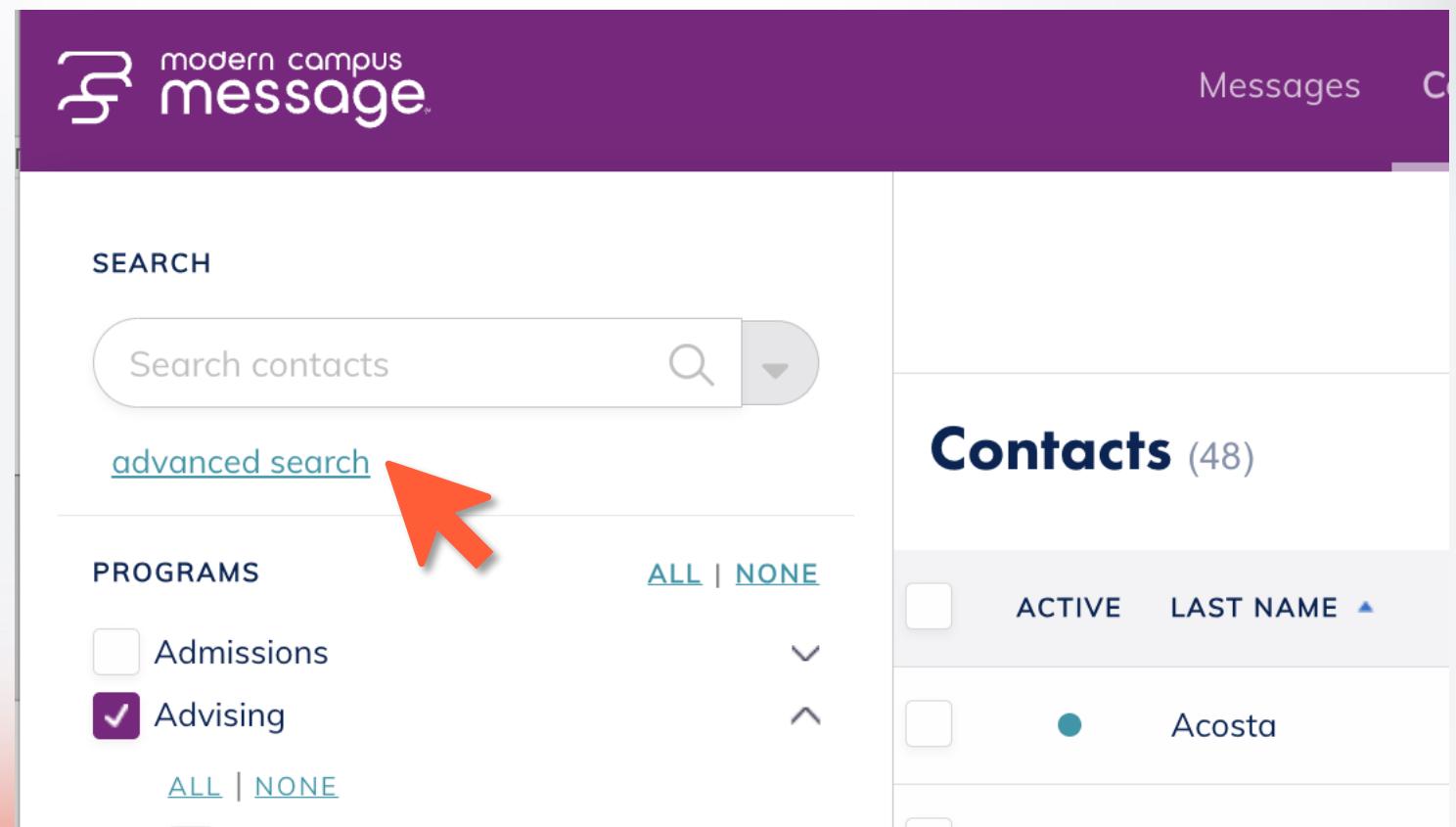
How to use Smart Send



Using Advanced Search

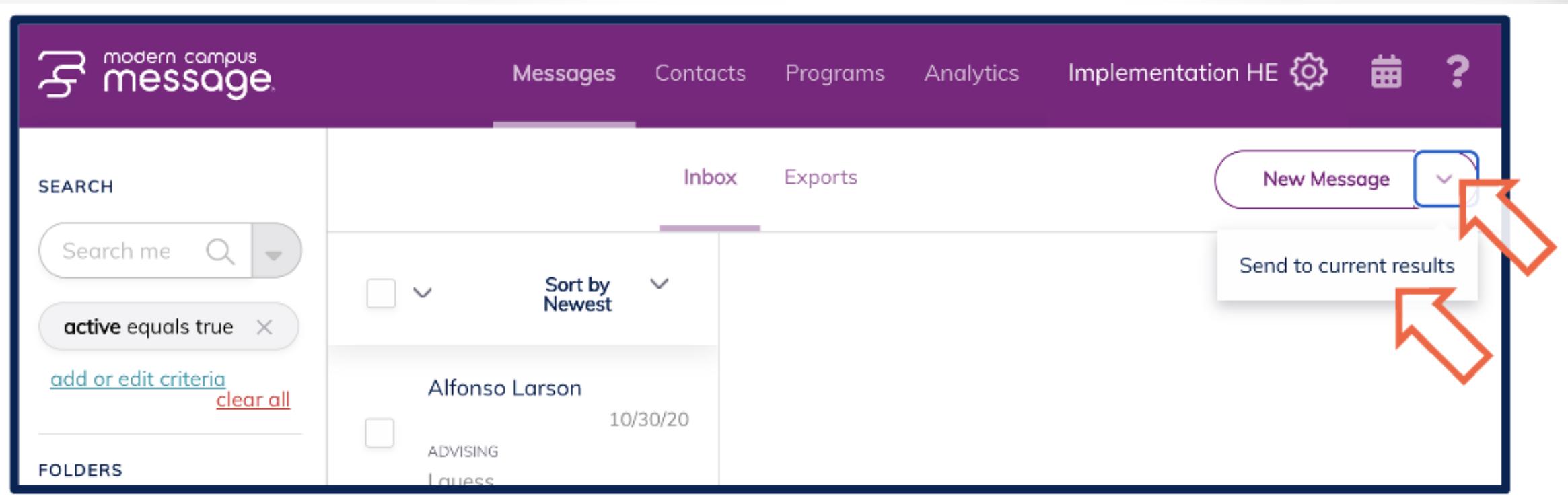
1. Click “Advanced Search”
2. Set your criteria
3. “Search”

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

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modern campus message

Messages Contacts Programs Analytics Implementation HE ?

SEARCH

Search me

active equals true

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

FOLDERS

Inbox Exports

Sort by Newest

Alfonso Larson 10/30/20

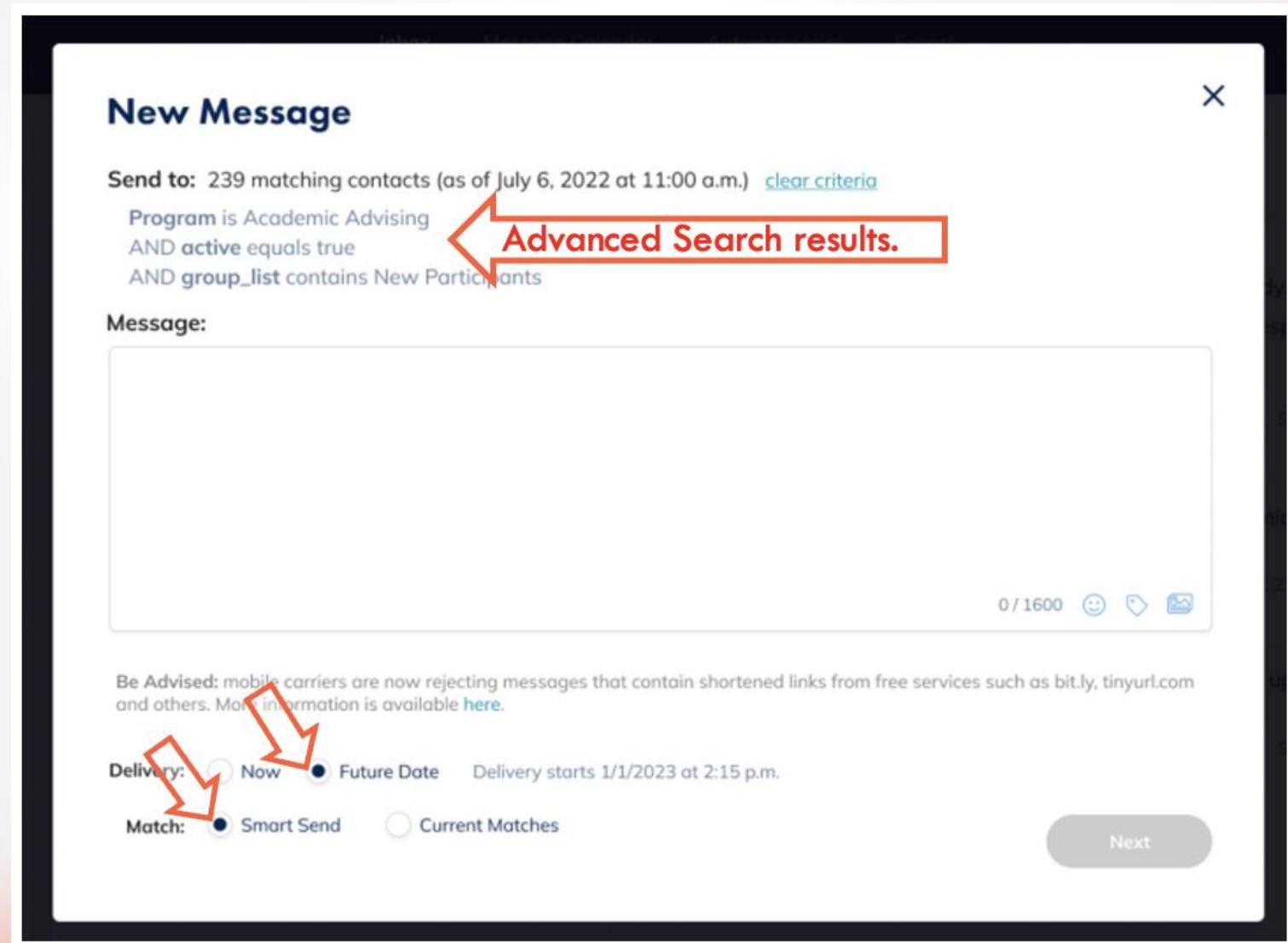
ADVISING Lauess

New Message

Send to current results

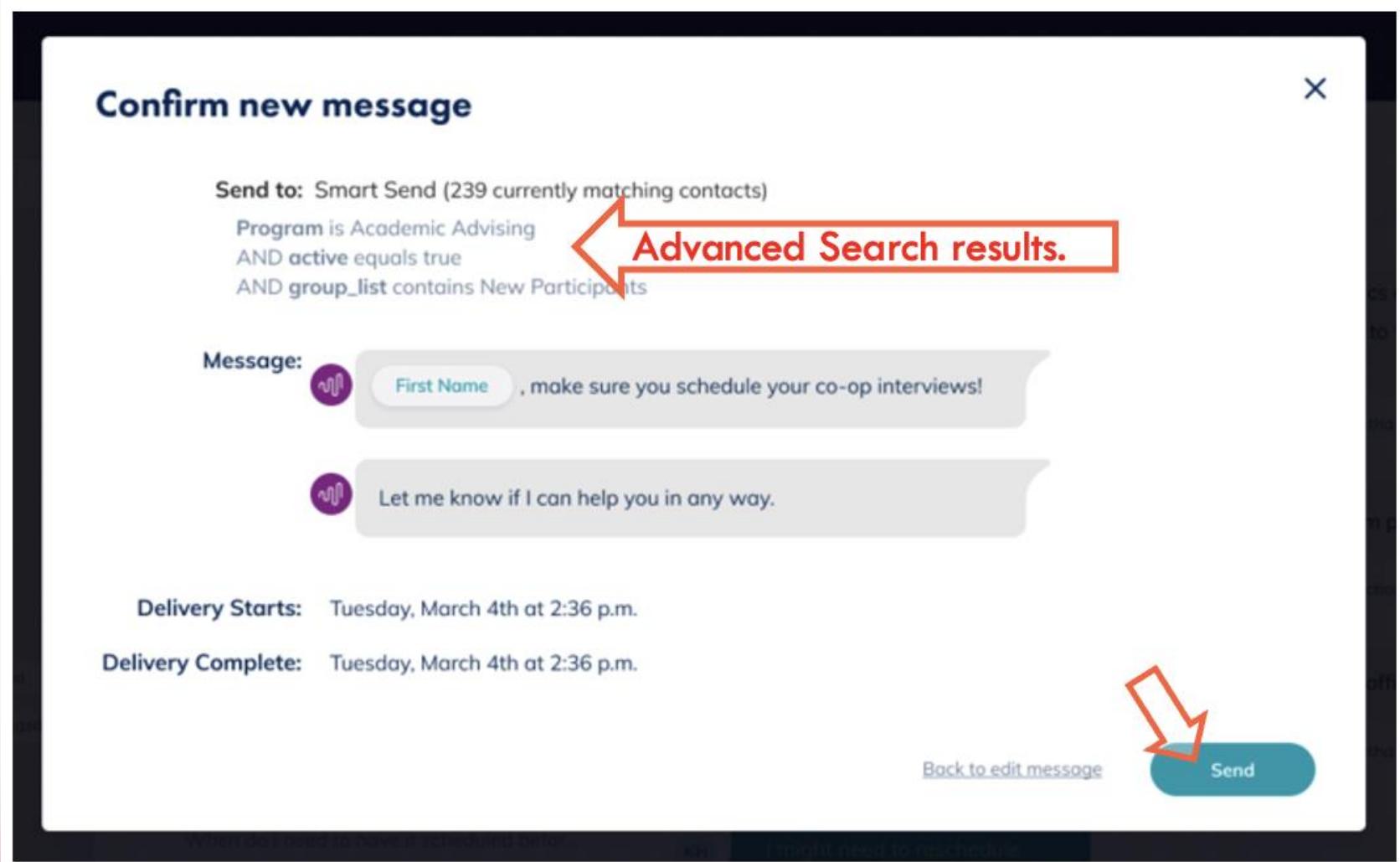
6. Write your message
7. Select “Future Date”
8. Keep “Smart Send” selected
9. Click next

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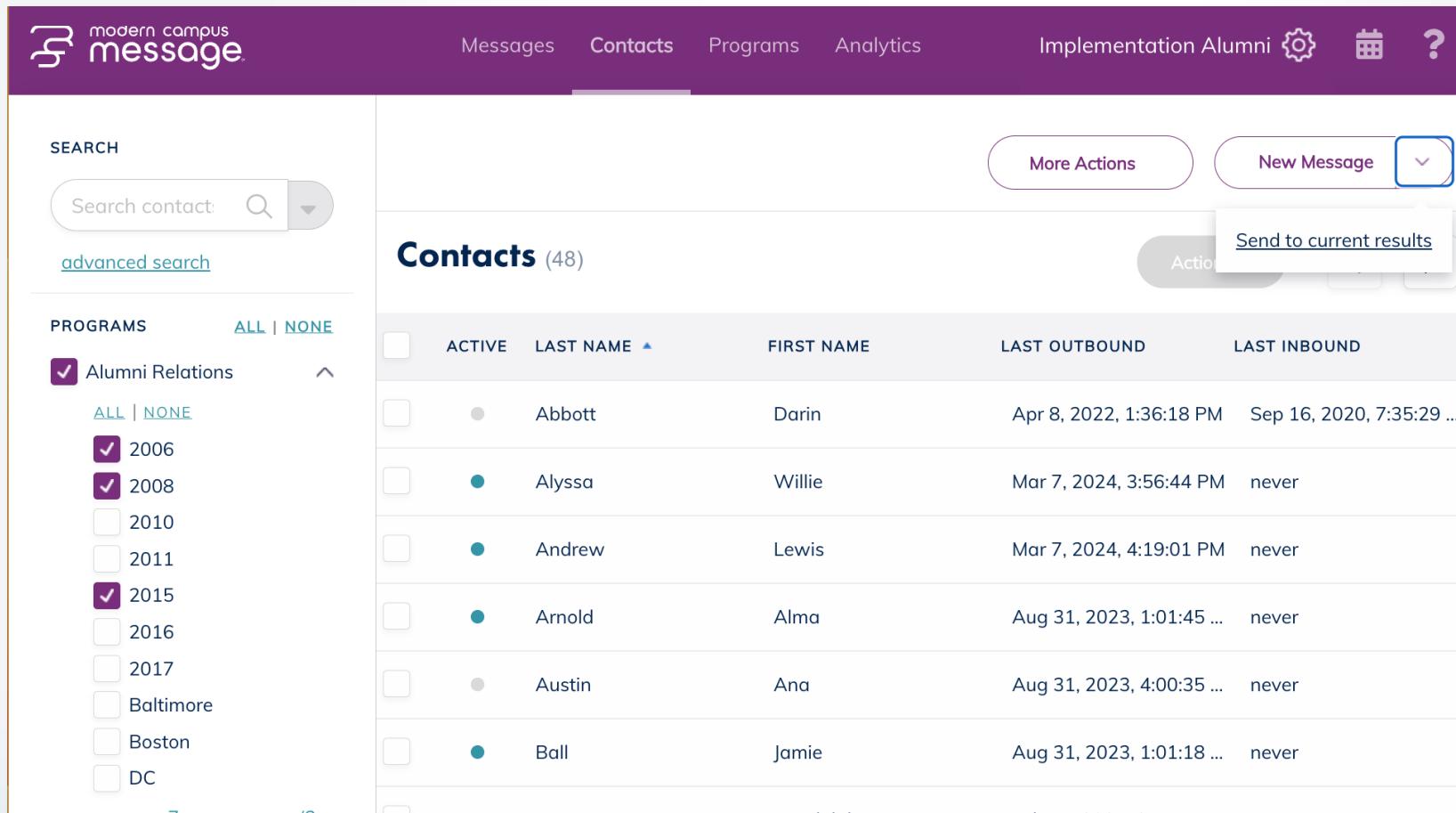


10. Confirm your message

11. Click “Send”!



Using “Send to Current Results”



The screenshot shows the modern campus message software interface. The top navigation bar includes links for Messages, Contacts, Programs, Analytics, Implementation, Alumni, and various settings. The main content area is titled "Contacts (48)". A context menu is open over the first contact in the list, with the option "Send to current results" highlighted. The left sidebar contains search and advanced search fields, and a "PROGRAMS" section with checkboxes for "Alumni Relations" and various years (2006, 2008, 2010, 2011, 2015, 2016, 2017, Baltimore, Boston, DC). The main table lists contacts with columns for Active status, Last Name, First Name, Last Outbound date, and Last Inbound date.

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

SEARCH

Search contact:

[advanced search](#)

PROGRAMS [ALL | NONE](#)

Alumni Relations ^

ALL | NONE

2006

2008

2010

2011

2015

2016

2017

Baltimore

Boston

DC

1. Contacts Tab 

2. Choose programs/groups 

3. Dropdown Arrow 

4. Sent to Current Results 

Send to current results

Contacts (48)

<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"/>	●	Andrew	Willie	Mar 7, 2024, 3:56:44 PM	never
<input type="checkbox"/>	●	Arnold	Lewis	Mar 7, 2024, 4:19:01 PM	never
<input type="checkbox"/>	●	Austin	Alma	Aug 31, 2023, 1:01:45 ...	never
<input type="checkbox"/>	●	Ball	Ana	Aug 31, 2023, 4:00:35 ...	never
<input type="checkbox"/>	●	Ball	Jamie	Aug 31, 2023, 1:01:18 ...	never

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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!