

Introduce
yourself in the
chat! Which
institution are
you representing?

Custom Data Fields

Your data opens up the platform to create customized segments!

Kelsey Seale

Wednesday, January 14, 2026



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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.

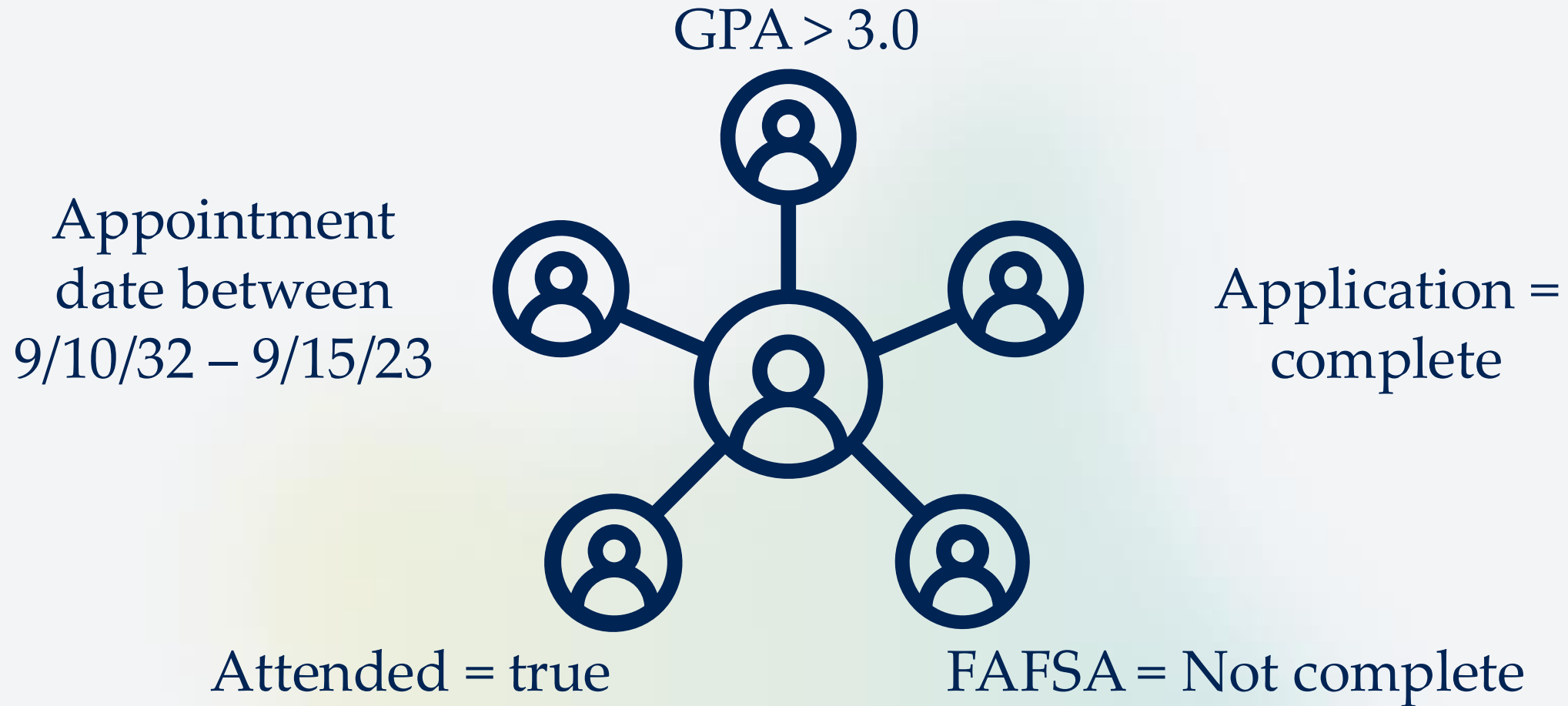
6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!

Agenda

1. 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
- 

Available Data

Custom fields expand your Message experience.



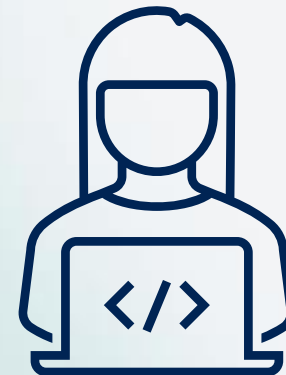
Step 1

Decide what you
want to DO.



Step 2

Create the data
you NEED.



How can I use data?

- *Combat Decreased Enrollment*

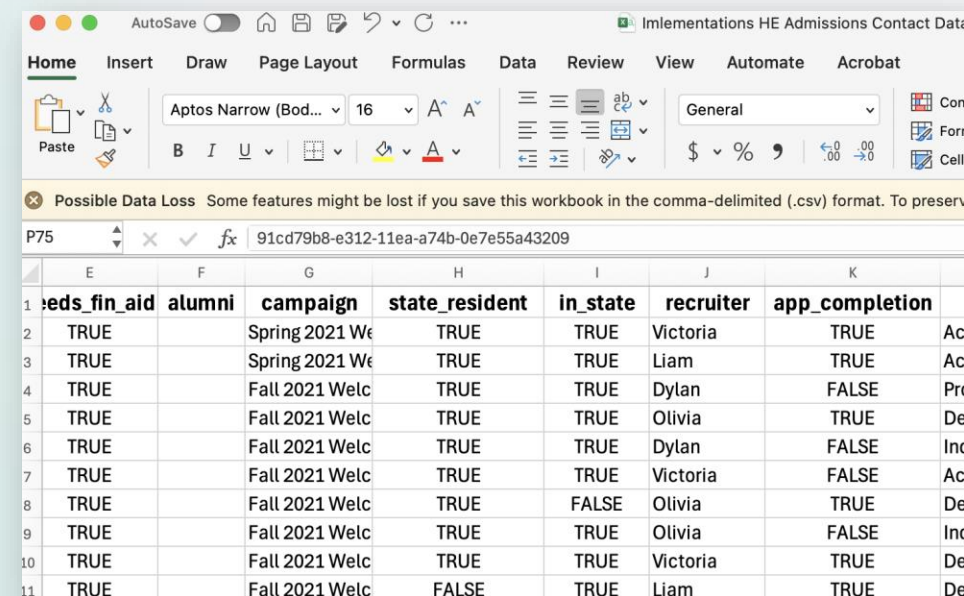
- Pulling enrollment status (prior and current semesters)
- hold codes
- financial aid status.

- *Increase Event Attendance*

- Pulling location
- high school information.

- *Increase Alumni Giving*

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



Possible Data Loss Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserv

	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!

Manage Fields for Coaching

Add Custom Field

	DISPLAY NAME	TYPE	VARIABLE NAME	HIDDEN	READONLY	EDIT
☰	first_name	String	first_name	<input type="checkbox"/>	<input type="checkbox"/>	
☰	last_name	String	last_name	<input type="checkbox"/>	<input type="checkbox"/>	
☰	Advisor	String	advisor	<input type="checkbox"/>	<input type="checkbox"/>	

You can restrict counselors from updating custom fields

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

Implementation File

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

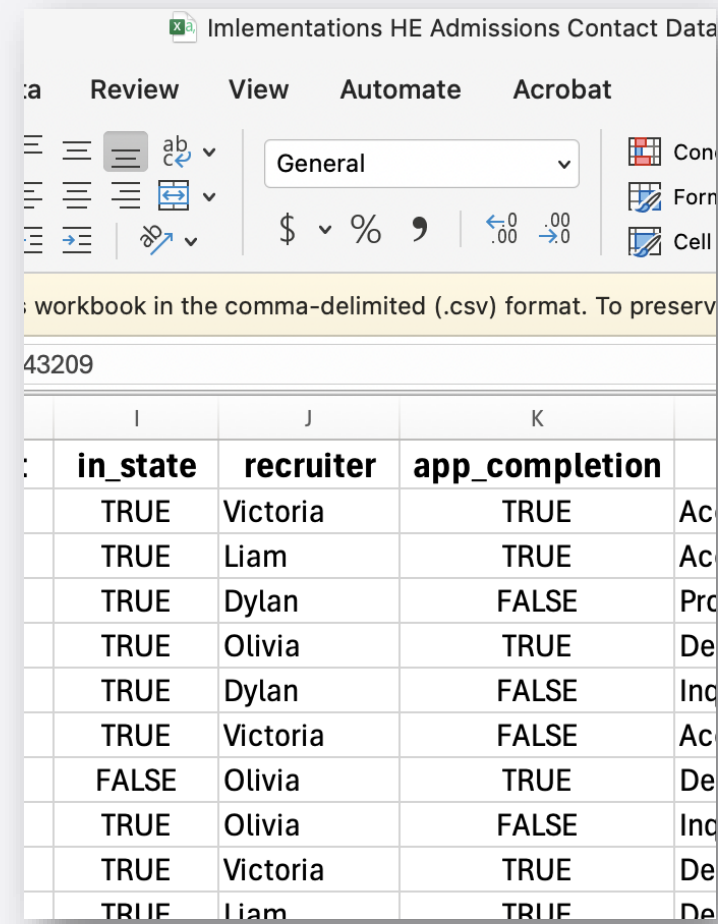
Which data fields are required?

Default Fields

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

Custom Fields

User generated
Enhance data management and
communication strategies



The screenshot shows an Excel spreadsheet with the following data:

	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

Contact Segmentation

GPA > 3.0

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



Application =
complete

Attended = true

FAFSA = Not complete

College + Career Readiness	Alumni	Academic Advising
<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

Financial Aid	Admissions	Residence Life
<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

What are fields you currently
use or want to start using for
contact segmentations?

Please share in the chat!

Use Your Data!

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!

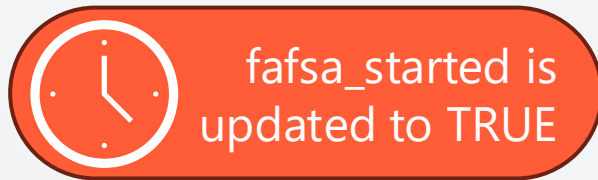
#	Date/Time	Condition	Content	Save Responses to Data Field
Applicati on_grad uation	Last_contribution_date + 3 Days		[first_name] Thank you so much for your generous contribution on [last_contribution_date]. Your support for Cricket University continues to make our vision a reality! You can see our plans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



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!!



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!!

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 contacts using
- 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](#)

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 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

Hey Beatrice! Have you declo

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

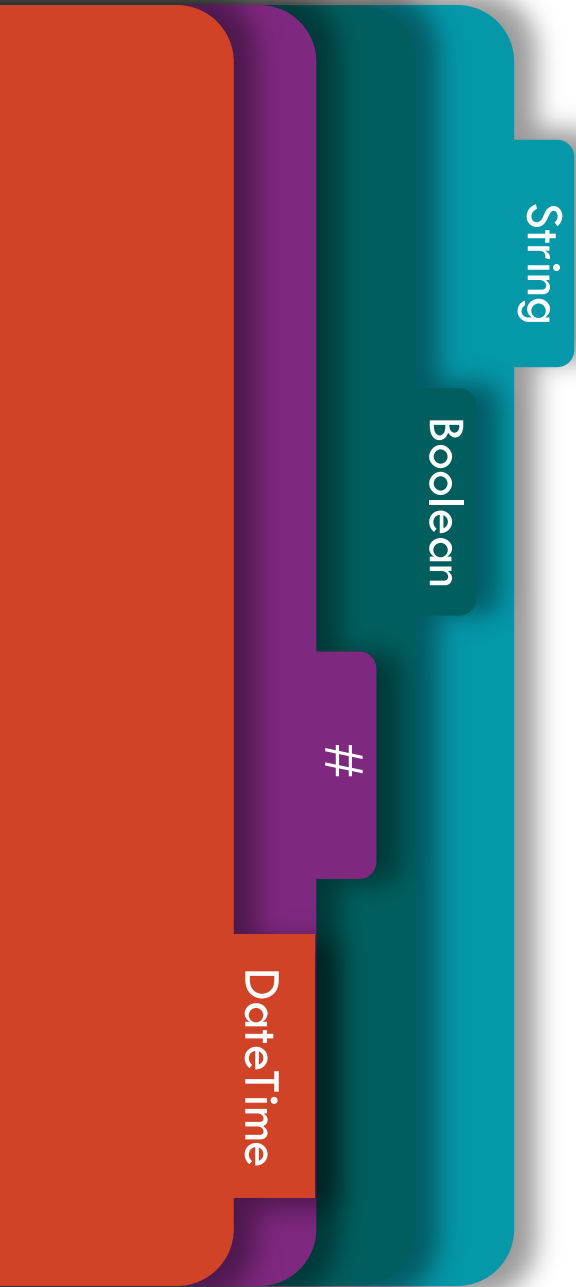
You still have some time to decide! Do you

In App Demo

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

Personalized Messages

Field Types



Field Type: String

No formatting required!

Letters, numbers, spaces, @&^!

Most common

Boolean

#

DateTime

campaign

Advisor

Field Type: Boolean

True / False

Allows you to use data as a variable

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

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



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

modern campus
message

MessagesContactsProgramsAnalytics

Implementation HE

Relaunch to update

PROGRAMS

☒ Admissions

☐ Advising

☐ Financial Aid

☐ Registrar

Message CalendarSettingsAdd Single ContactExport ContactsManage FieldsImport ContactsAutoresponderPhone Numbers

Manage Fields for Admissions

Add Custom Field

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

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

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.

What you will see
on contact pages
and in Advanced
Search

Choose the
best field type

Assigned to ALL
contacts – can be left
blank

≡	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!

The screenshot shows the 'Export Contacts' page in the Modern Campus interface. The top navigation bar includes links for 'Message Calendar', 'Settings', 'Add Single Contact', 'Export Contacts' (which is highlighted with a purple underline), 'Manage Fields', and 'Import Contacts'. Below the navigation bar, there are two sub-links: 'Autoreponder' and 'Phone Numbers'. The main heading is 'Export Contacts from Alumni Relations'. Underneath, the section is titled 'Export Contact Data'. A descriptive text states: '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' (selected) and 'Only Unreachable Contacts'. Each option has a brief description of the data included in the export. 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

The image shows a 'Save As' dialog box with a light gray grid background. The dialog box is white with rounded corners and contains the following elements:

- Save As:** A text input field containing 'Message Data File', highlighted with a green border.
- Tags:** An empty text input field.
- Where:** A dropdown menu showing 'Desktop' with a folder icon, a green double-headed arrow icon, and a small downward arrow icon.
- Online Locations:** A button on the left side of the dialog.
- File Format:** A dropdown menu showing 'Comma Separated Values (.csv)', highlighted with a green border and a green double-headed arrow icon.
- Options...:** A button located below the File Format dropdown.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right, with 'Save' being green and 'Cancel' being white with a gray border.

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

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)

Boolean

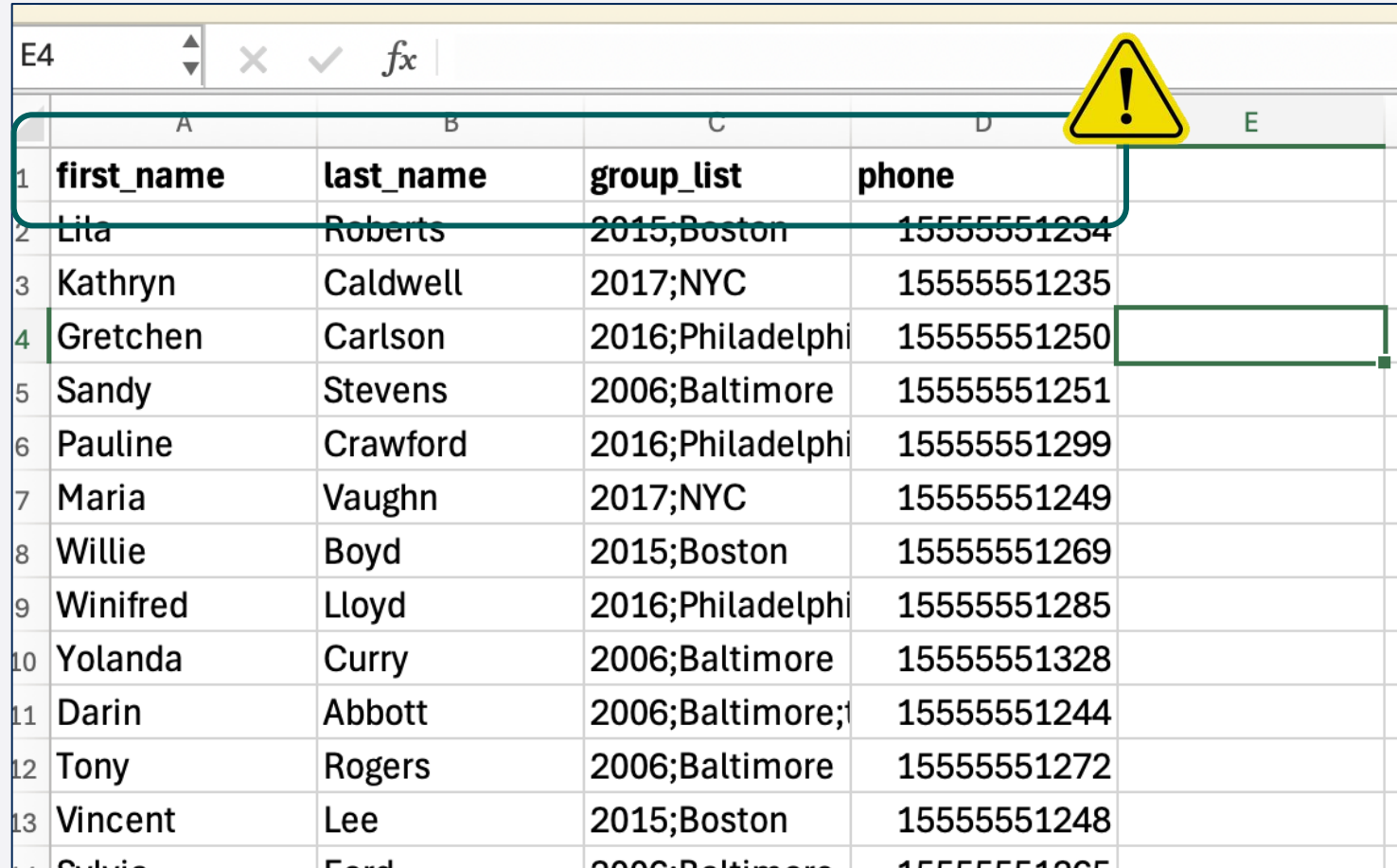
Displayed as a checkbox with 2 possible values called "true" and "false"

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



The image shows an Excel spreadsheet with a table of customer data. A yellow warning triangle with an exclamation mark is positioned over the 'phone' column header. A green line highlights the first row of data, and a green box highlights the cell in the 'phone' column for the third row (Gretchen Carlson).

	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	Julie	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 into
the Zoom Q&A feature!

Thank You

See you next month!

What can you learn from a message history export?

How many contacts responded “Yes” to “Are you still interested in applying?”

How many new contacts did we register this year?

Which user is sending out the most adhoc messages?

How many times did the autoresponder reply to an incoming text?

How many birthday messages went out this year?

How to Download Your Message History



modern[®]
campus



