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

modern campus®

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Your data opens up the platform to create customized segments!

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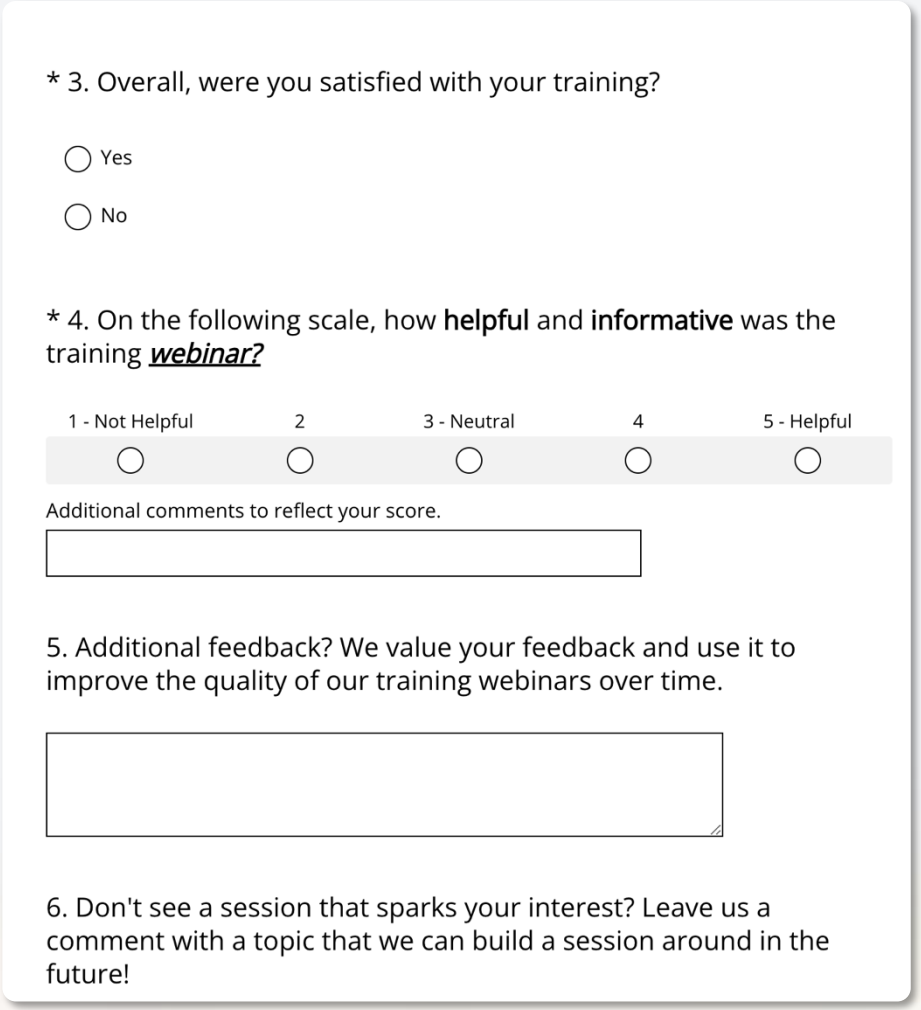
Post-Webinar Survey

- 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.

GPA > 3.0

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

Application = complete

Attended = true

FAFSA = Not complete

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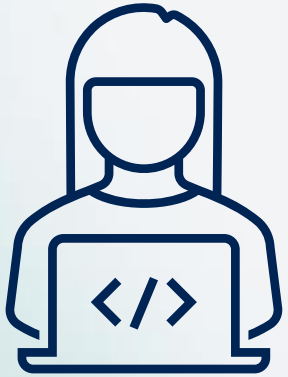
Step 1

Decide what you want to DO.

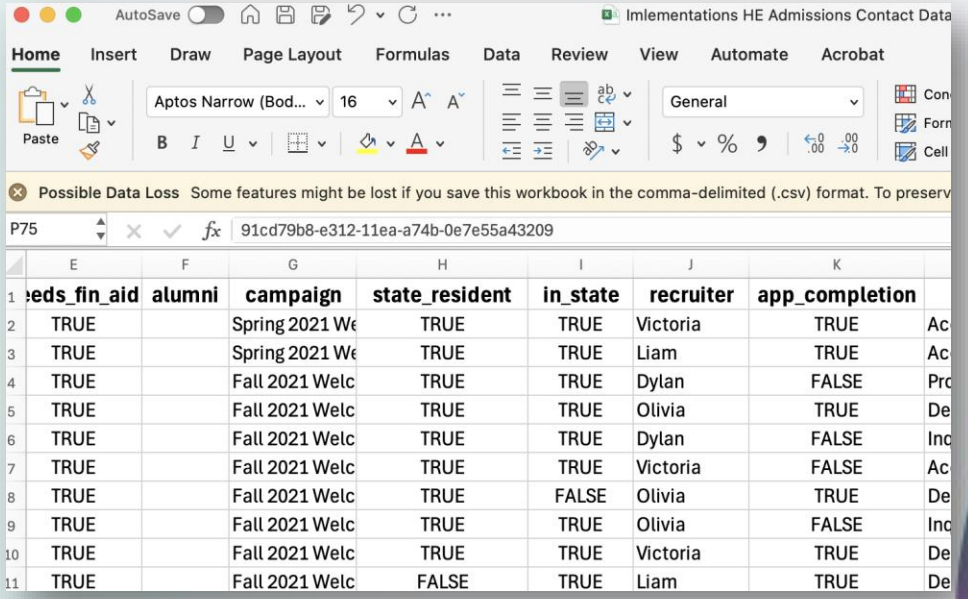
Step 2

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



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

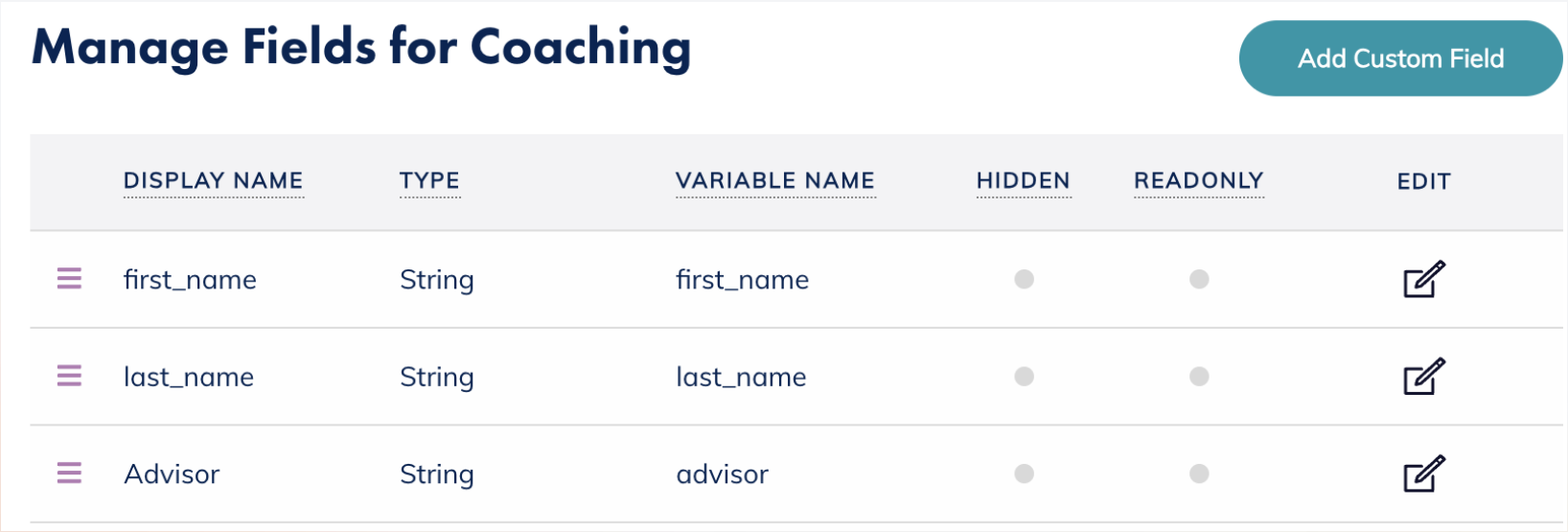
FAQs

In App Demo

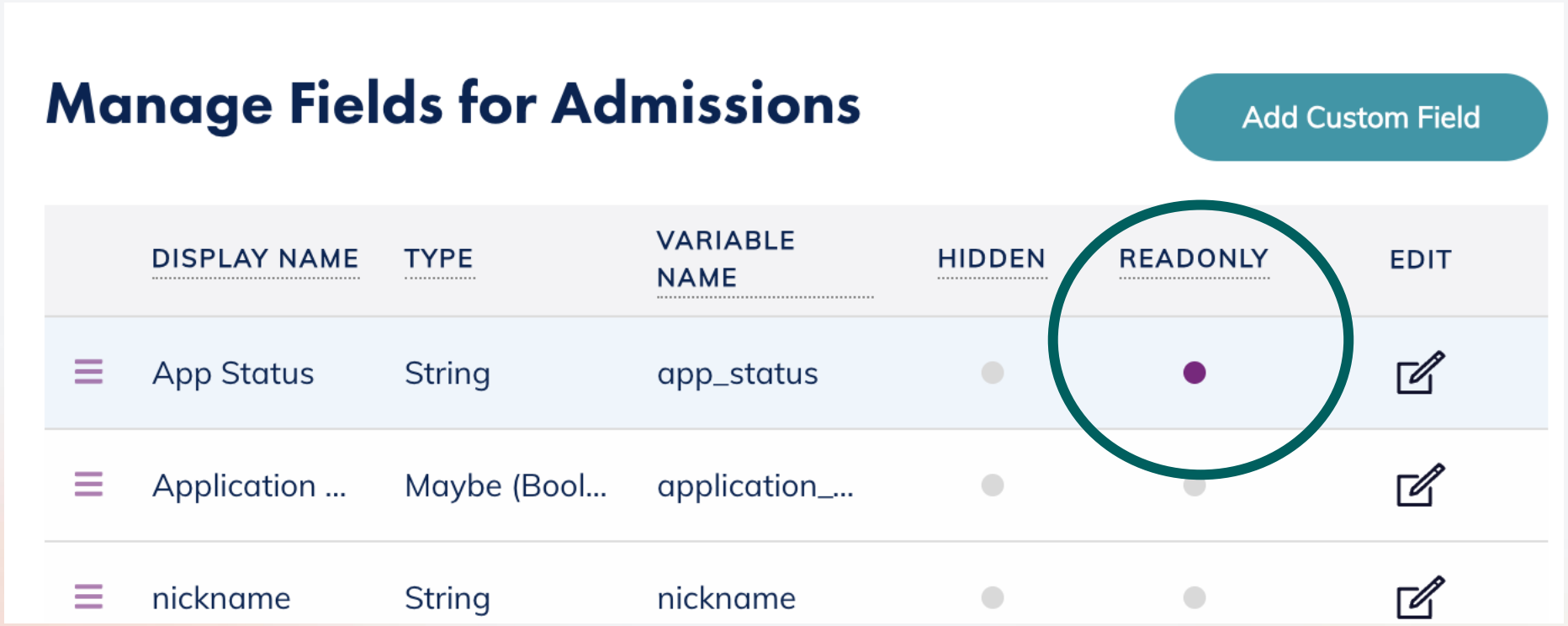
- Show how to find custom fields
- Quick tour of the page

Custom fields are permanent.

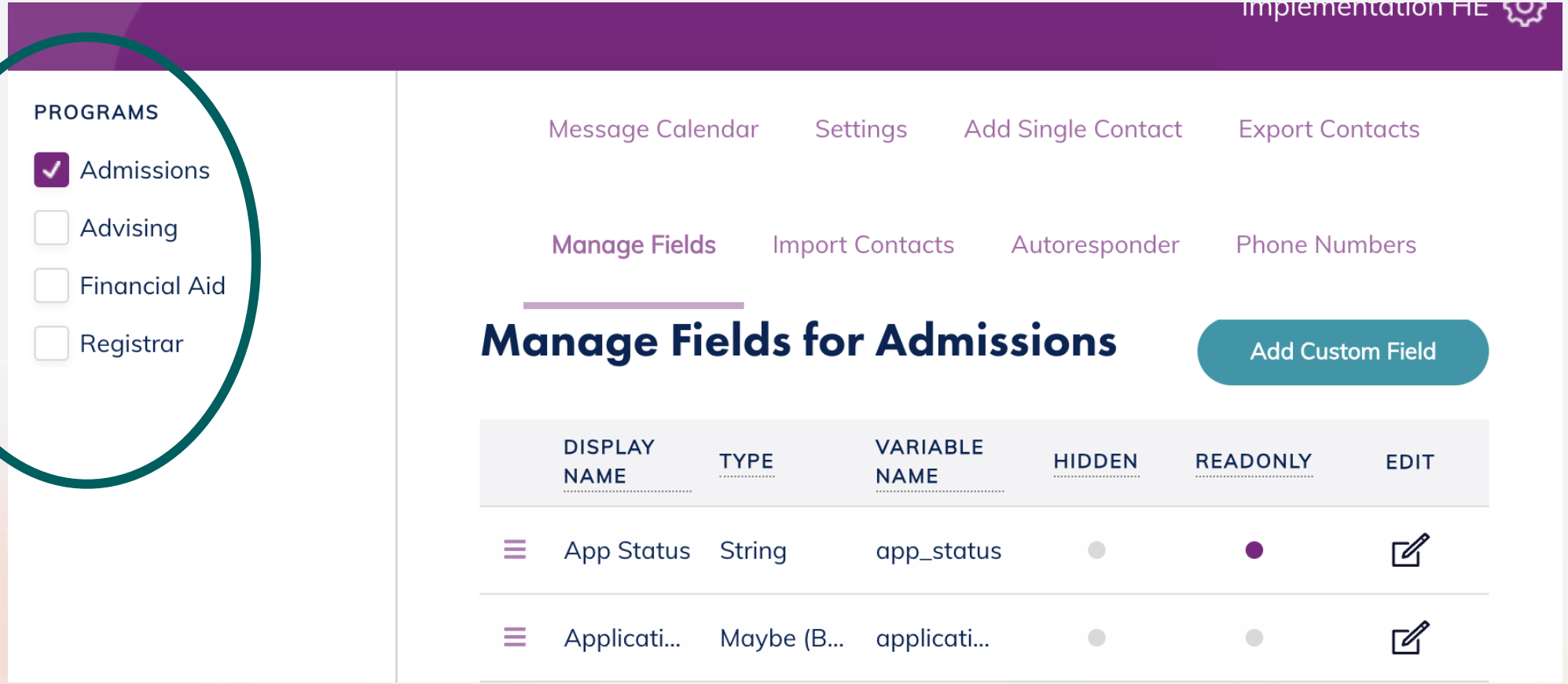
- They will stay on your export file
- Made a mistake? Make a new custom field!



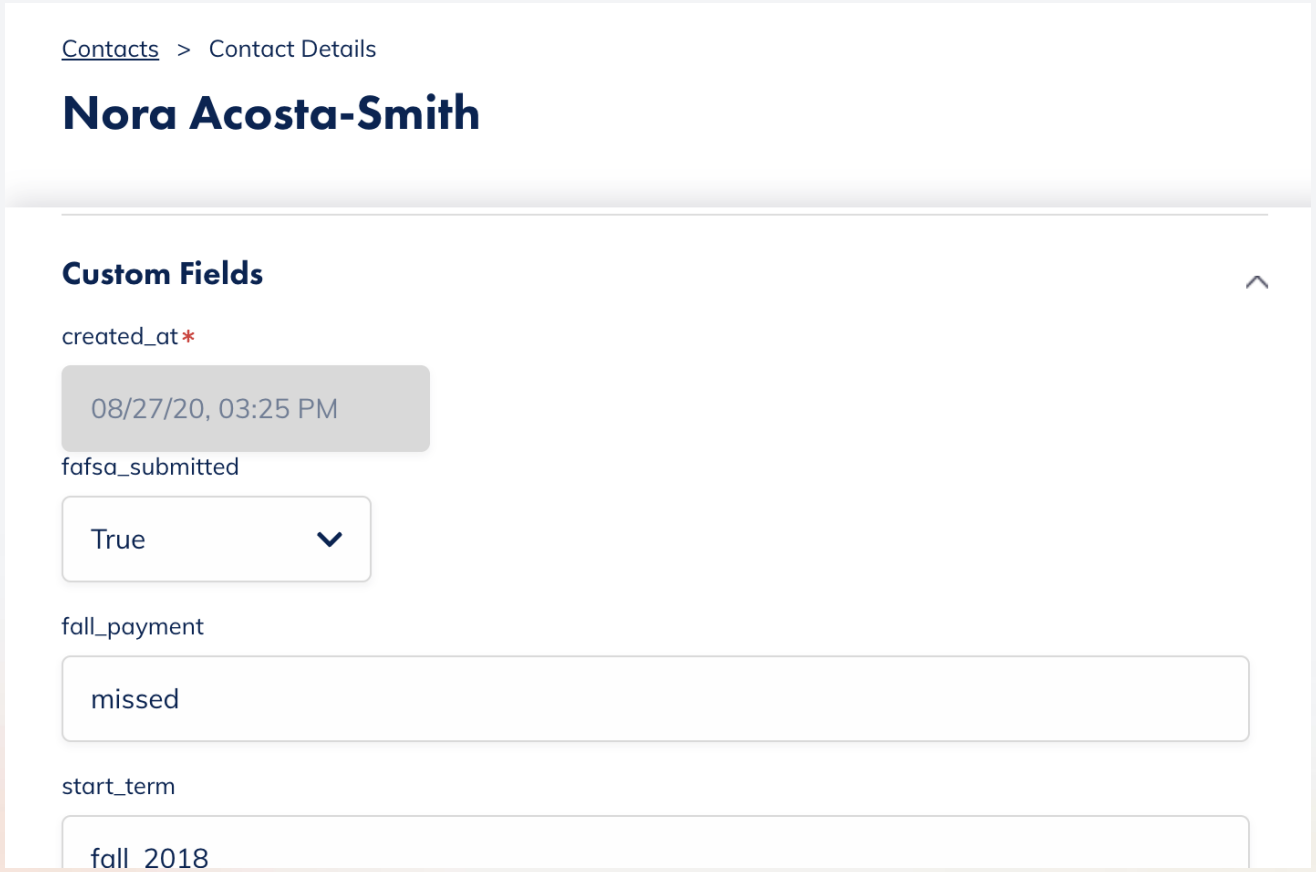
You can restrict counselors from updating custom fields



Custom fields are added on a per program basis



Custom field data can be viewed on contact cards unless hidden



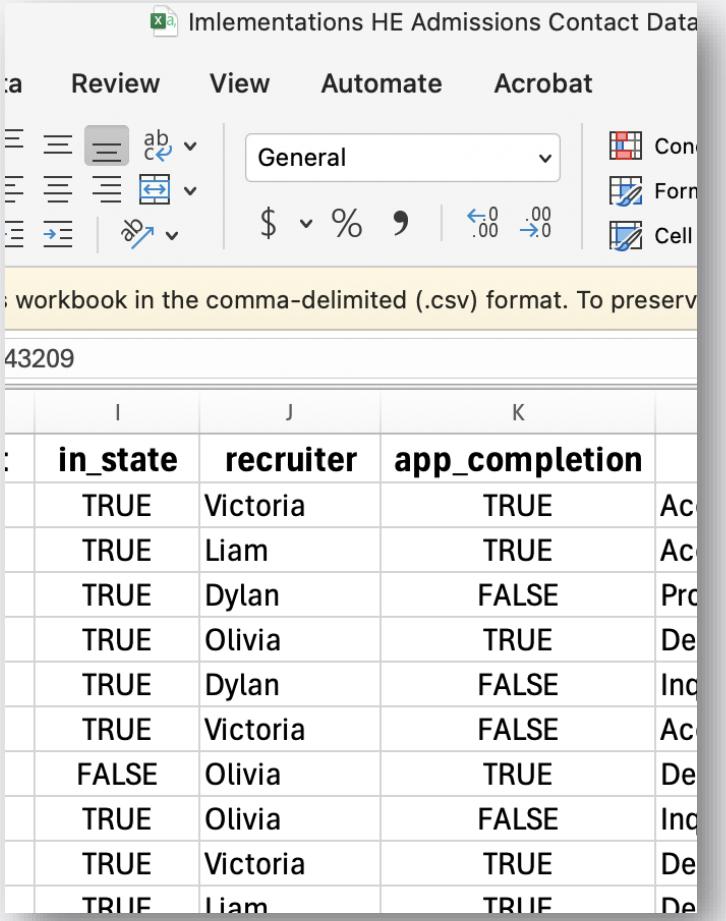
Which data fields are required?

Default Fields

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

Custom Fields

User generated
Enhance data management and communication strategies



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
• GPA • College • High School • Student Type • Advisor Name • Advisor Email • FAFSA Completed • FAFSA Started • High School Grad Year • College Major • College Confirmed • Parent Number	• State • Region • Graduating Class • Current field • Preferred name • Birthday	• 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
• FAFSA submitted • FAFSA completed • Award • Requirements satisfied • GPA • Veteran	• App status • App owner • Campus • Academic area • City • In state • HS GPA	• Residency status • Building • Registration • Active athlete

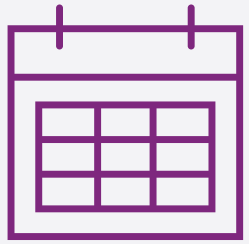
What are fields you currently use or want to start using for contact segmentations?

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

When to use Event Triggered Messages

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

Event Triggered Messaging

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

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	**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? **Response to Yes:** Awesome, the application is due in 3 weeks! **Response to No:** Thanks for letting us know. If you need my help feel free to reach out!	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

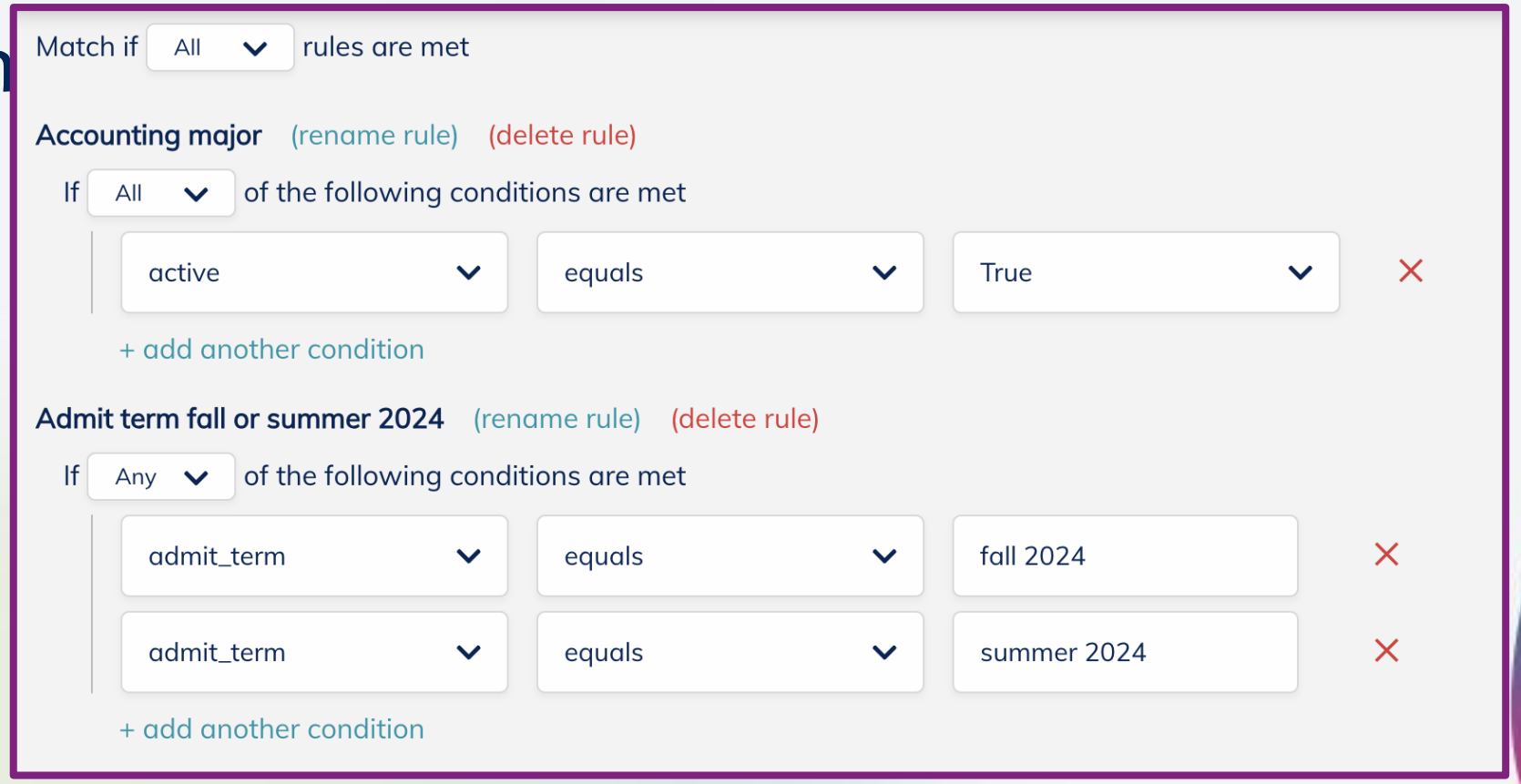
Action Specific

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

Advanced Search

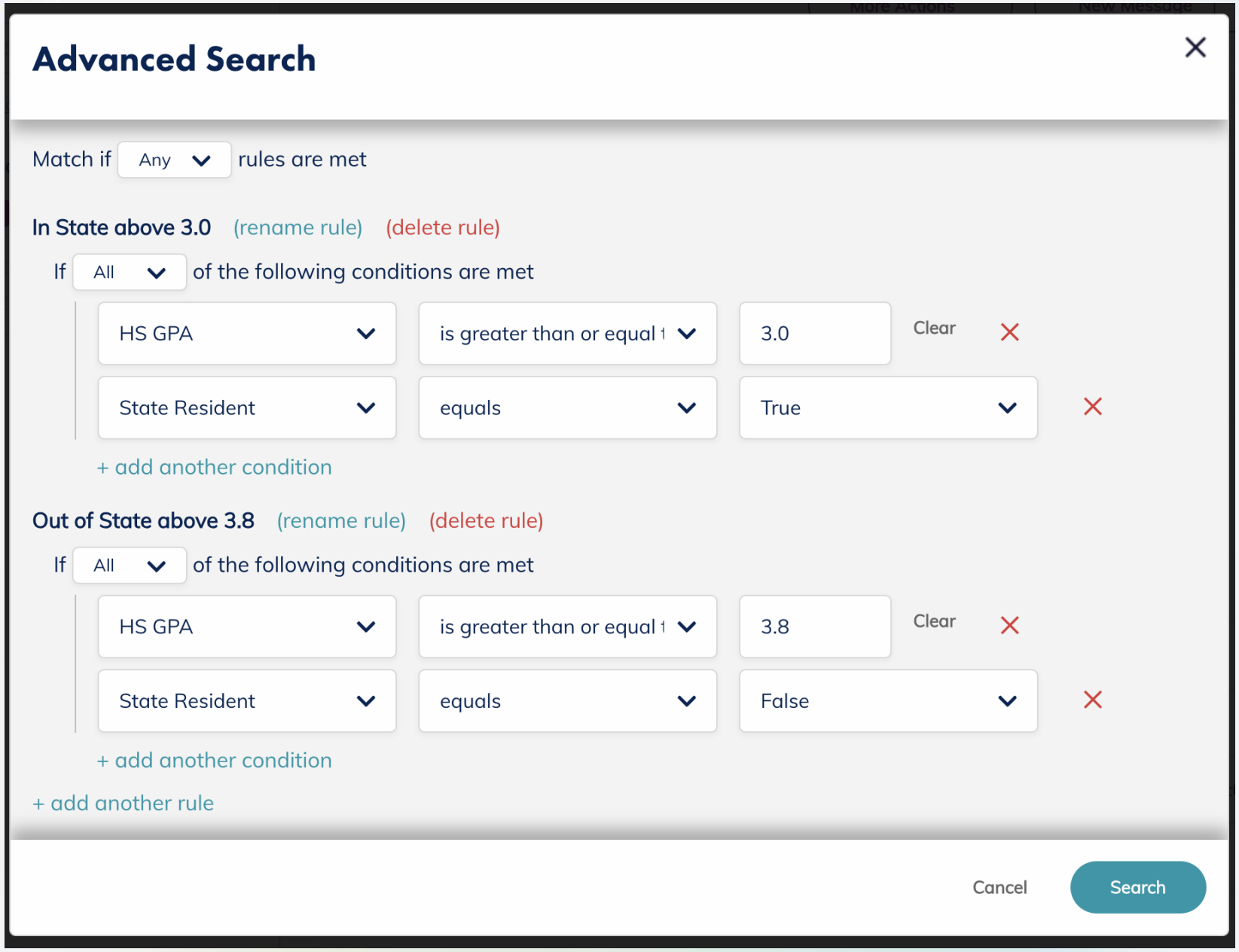
Advanced Search

- Hyper-segmen contacts using
- And/or search functions



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

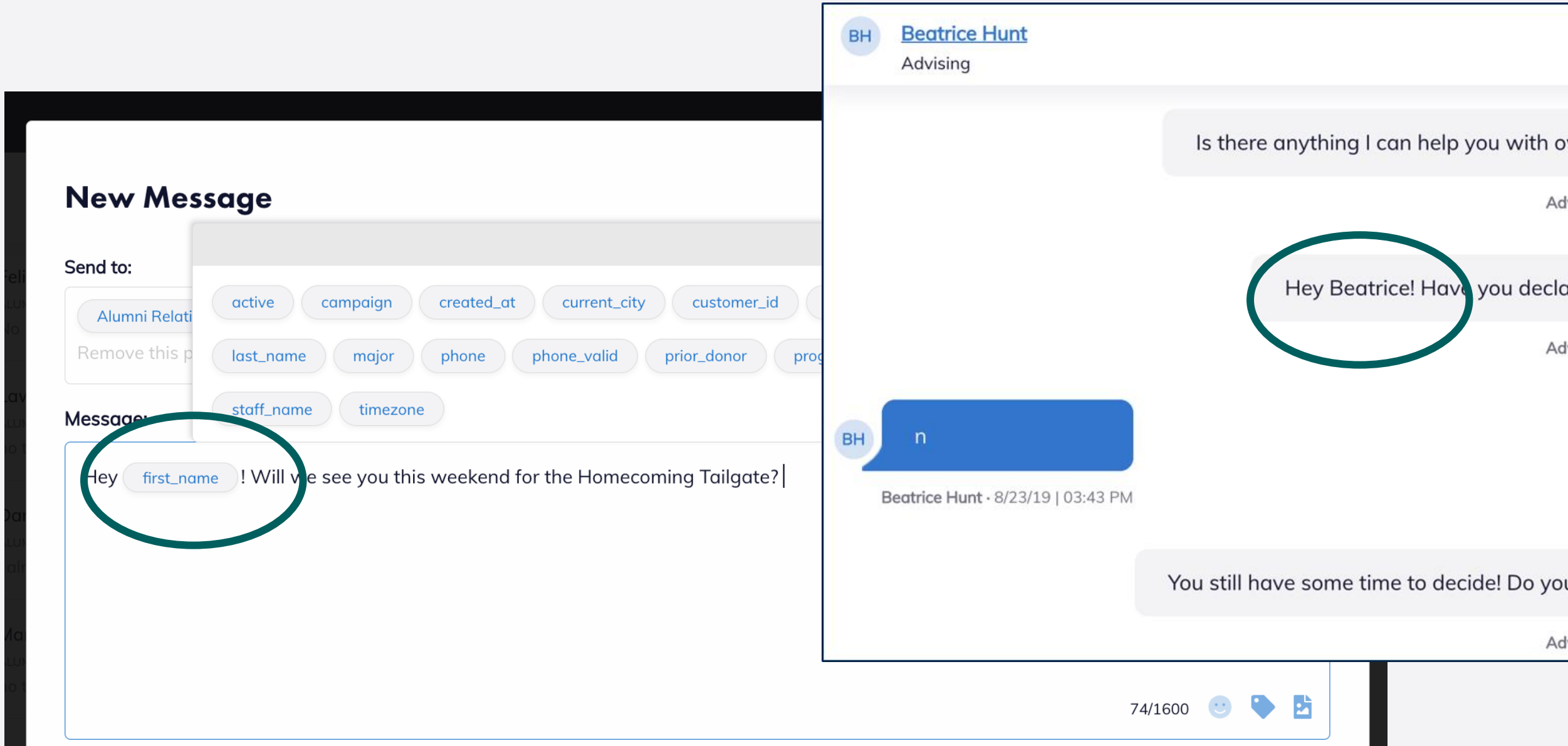

Advanced Search
Match if Any rules are met
In State above 3.0 (rename rule) (delete rule)
If All of the following conditions are met
HS GPA
is greater than or equal t
3.0
Clear
State Resident
equals
True
+ add another condition
Out of State above 3.8 (rename rule) (delete rule)
If All of the following conditions are met
HS GPA
is greater than or equal t
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

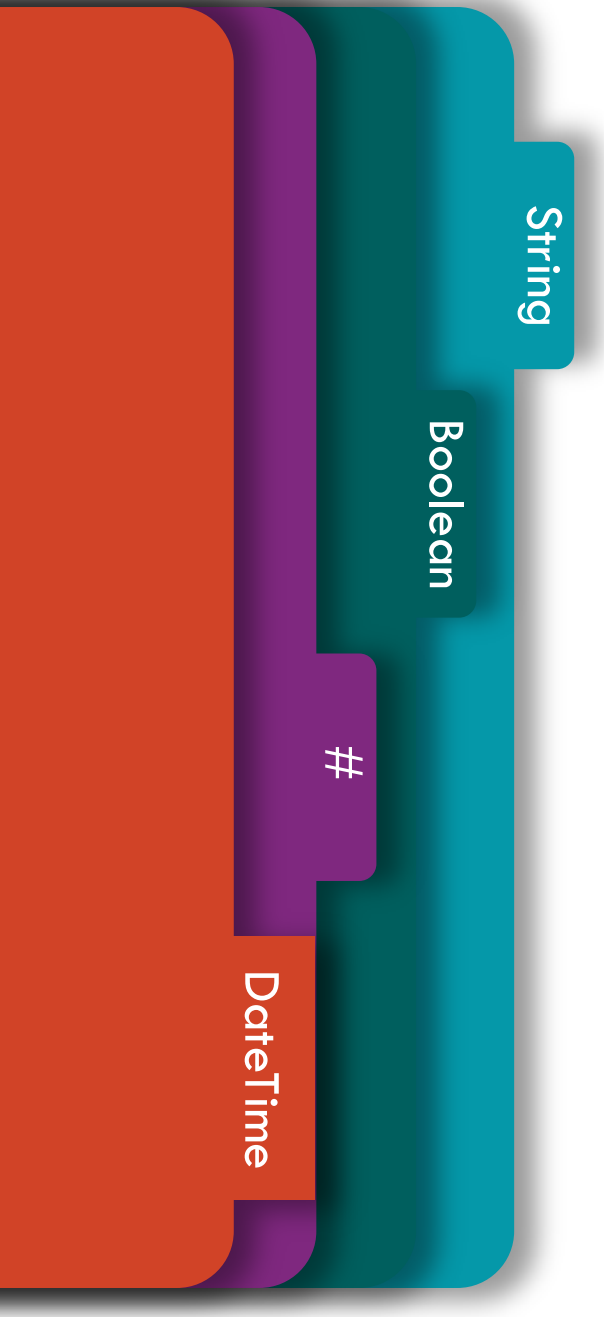
Message Personalization



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, @&^!

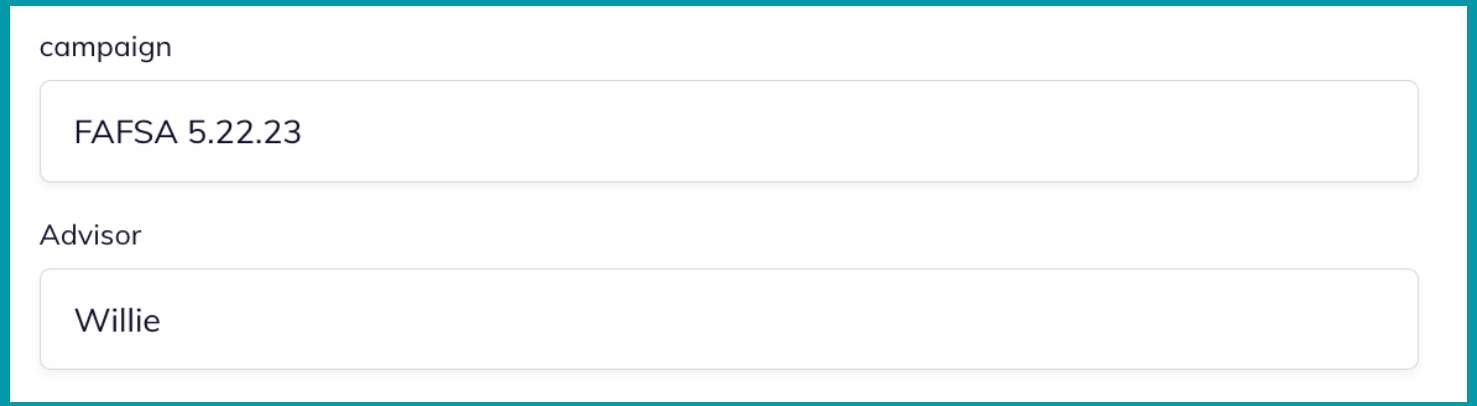
Most common

Boolean

#

DateTime

String



Field Type: Boolean

True / False

Allows you to use data as a variable

String

Boolean

#

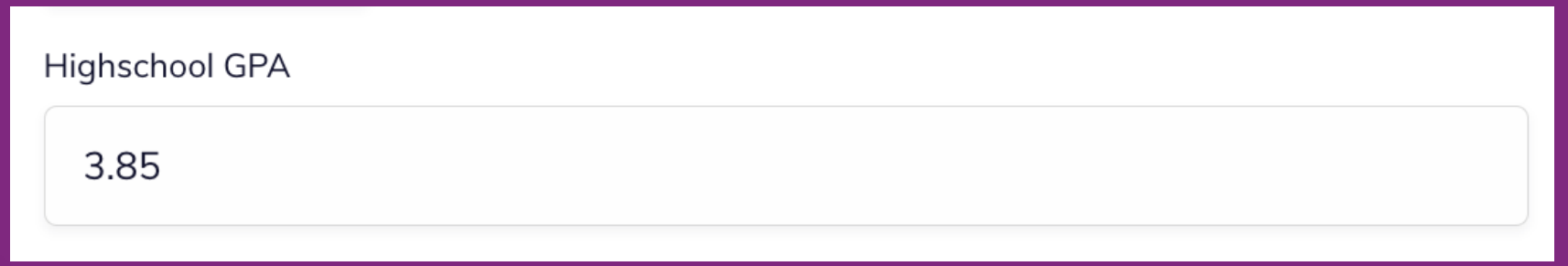
DateTime

Field Type: Numeric + Float

Numeric = a whole number

Float = a number and decimal

Can be used to search using <, >, =



String

Boolean

#

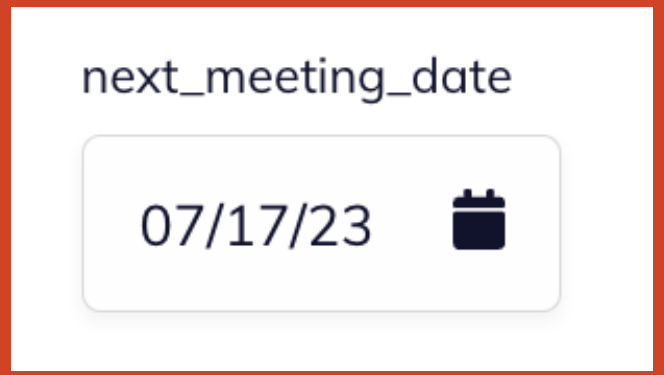
DateTime

Field Type: Date / Time

Date: YYYY-MM-DD

Time: HH:MM:SS

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



String

Boolean

#

DateTime

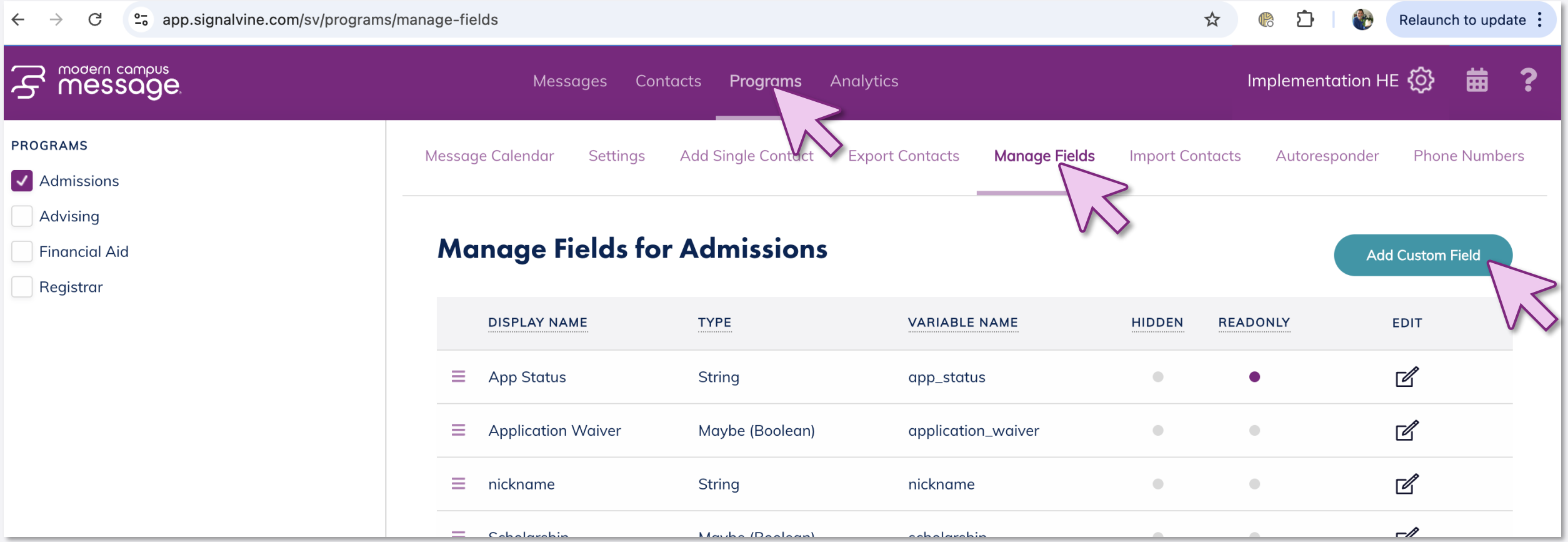
In App Demo

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

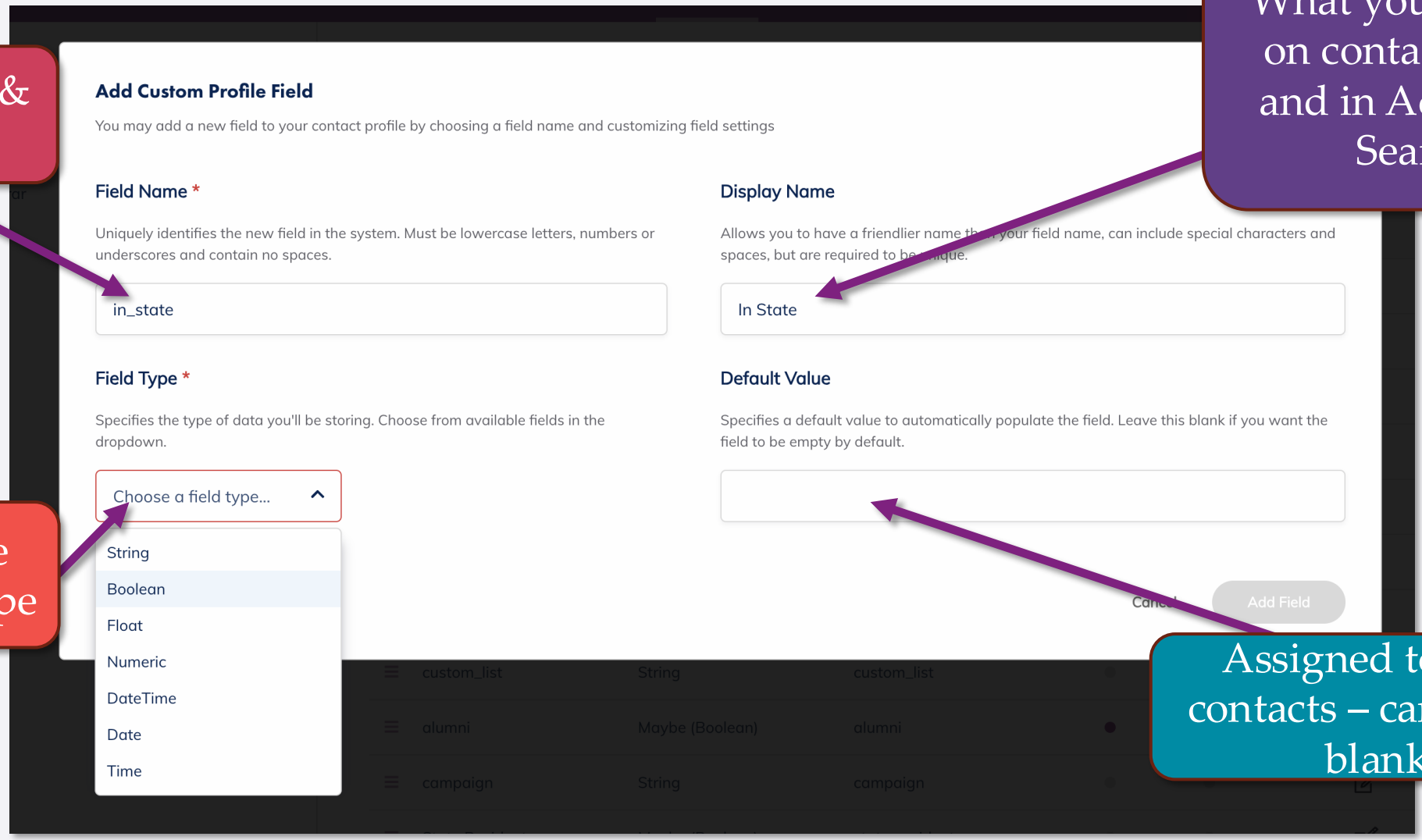
Program Tab → Custom Field Tab → Scroll to the bottom

Create a Custom Field

Programs Tab → Manage Fields → Add Custom Field



Add Your Field



Lowercase & no spaces

What you will see on contact pages and in Advanced Search

Choose the best field type

Assigned to ALL contacts – can be left blank

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	sig
	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

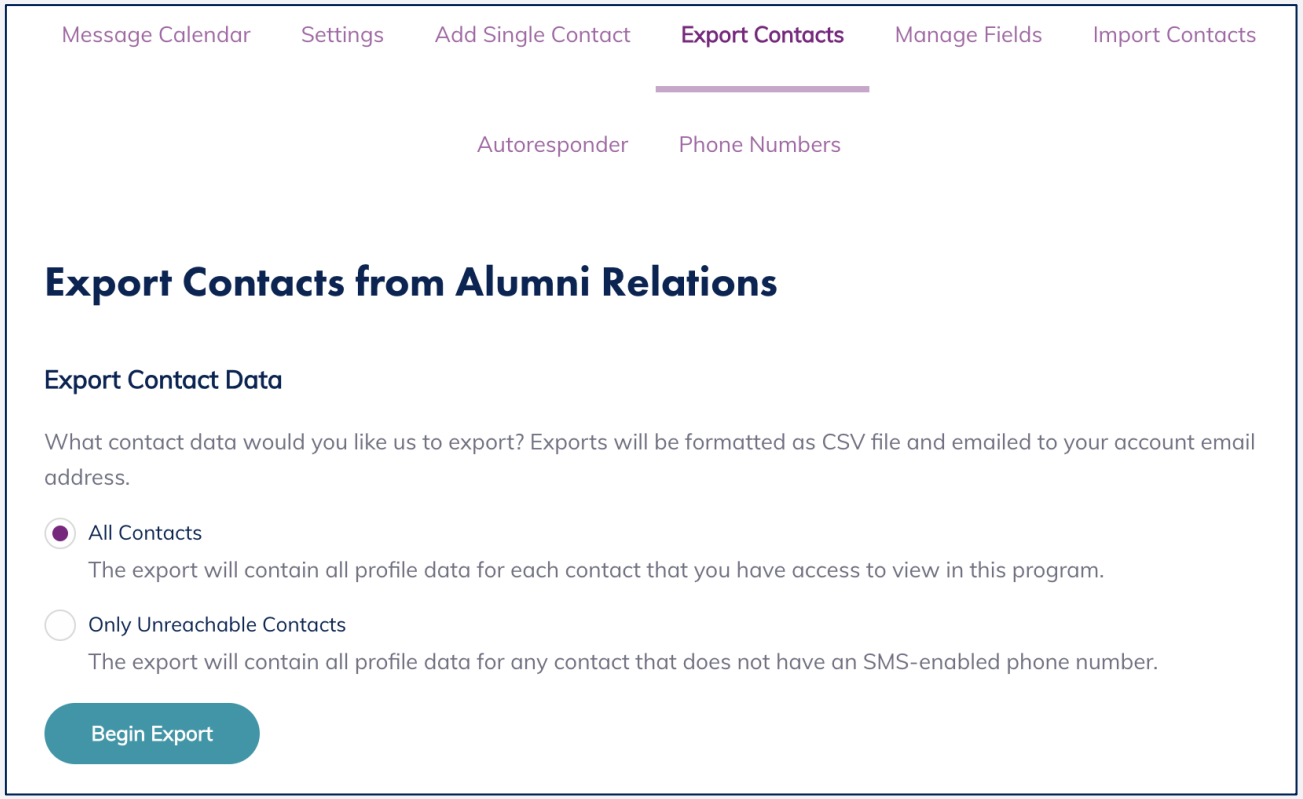
Where is my data file?

- 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!



Avoid an Error!

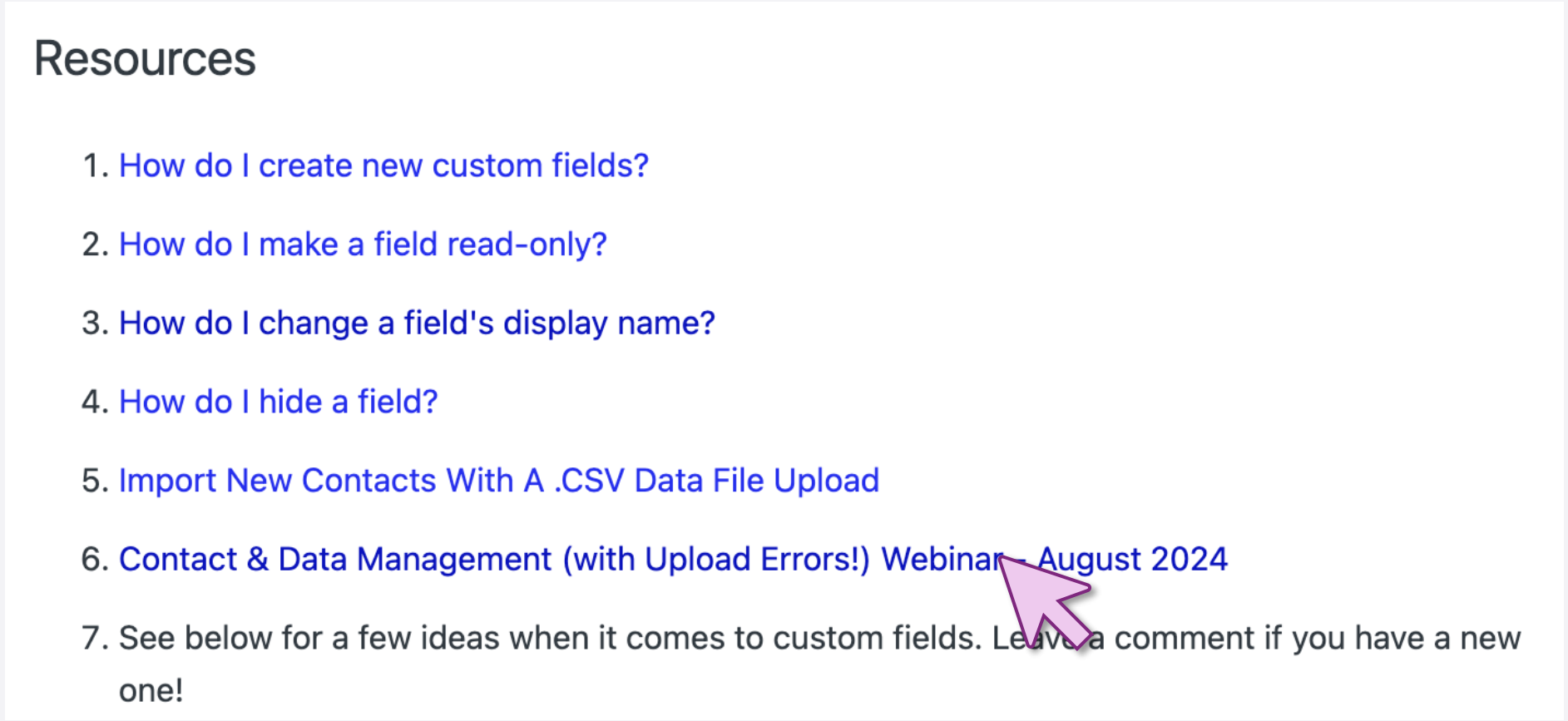
- Delete the extra columns
- Edit your data
- Reupload the file!

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!

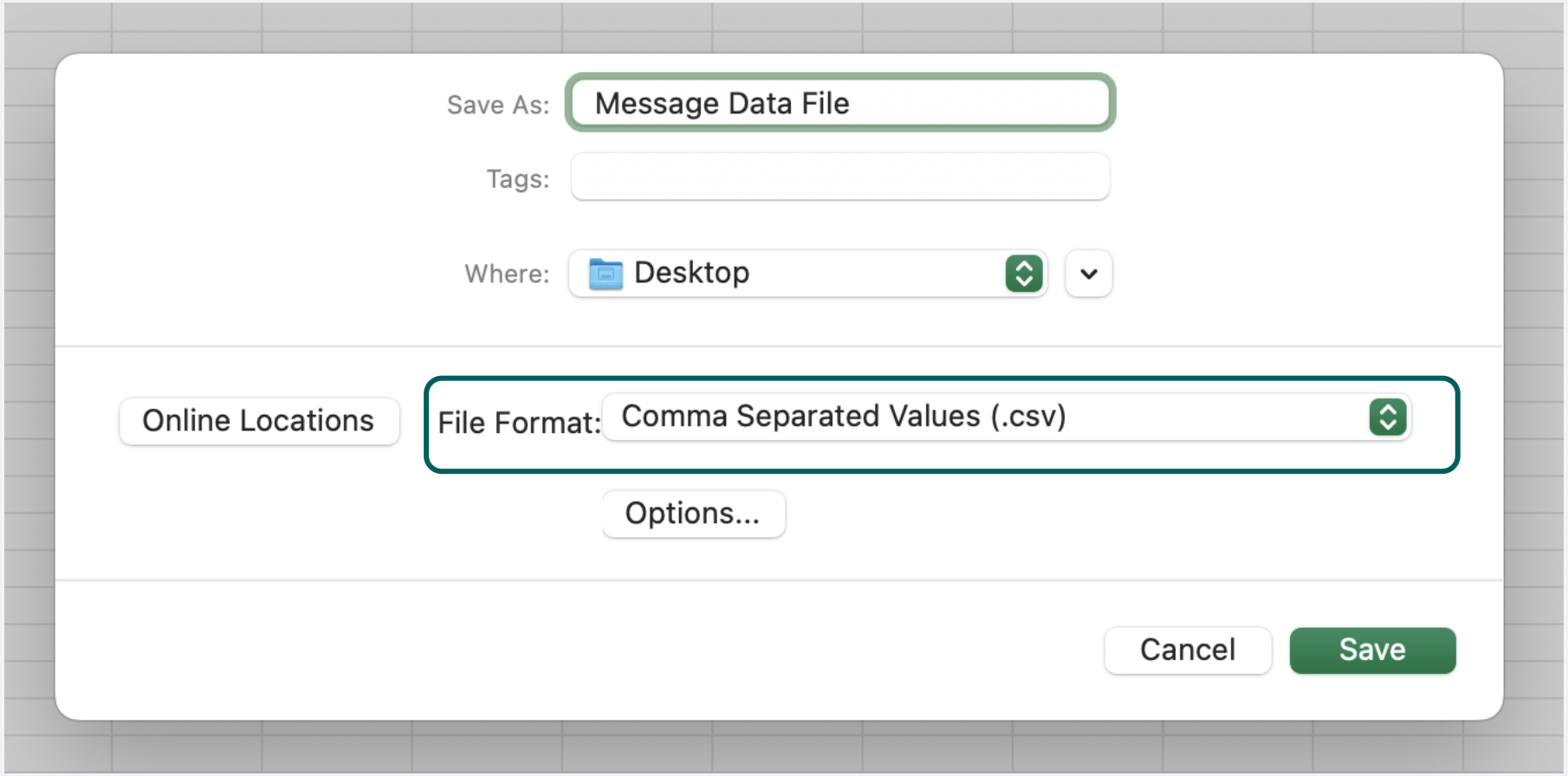


Format Your Data

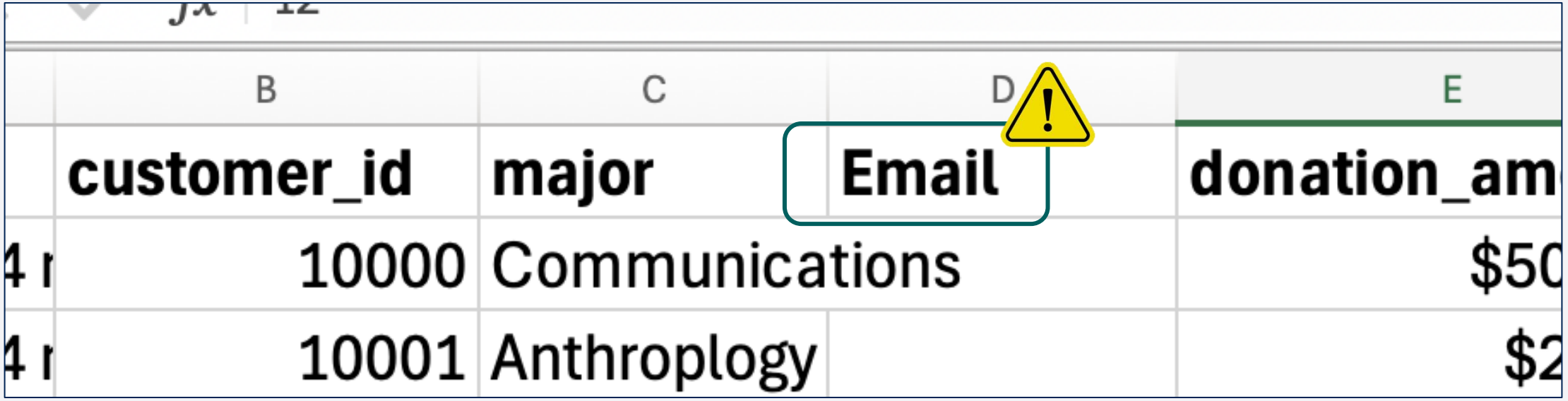
Data File Rules

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

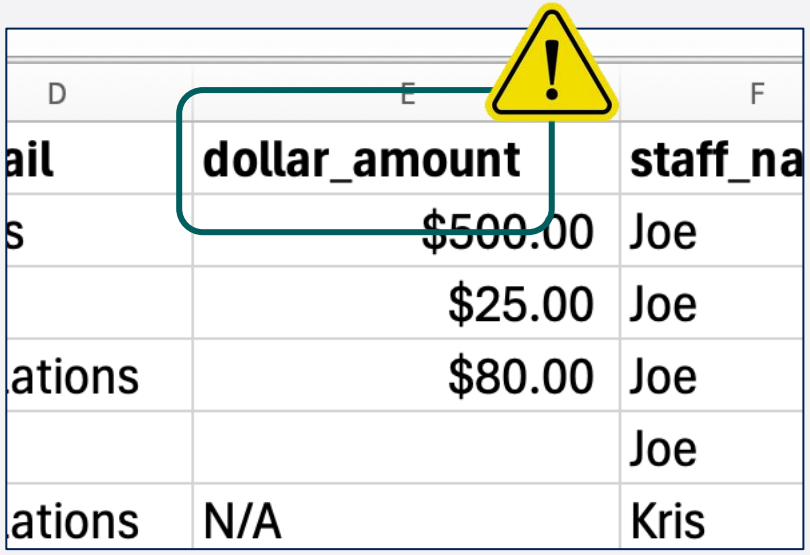

Save As:
Message Data File
Tags:
Where:
Desktop
Online Locations
File Format:
Comma Separated Values (.csv)
Options...
Cancel
Save

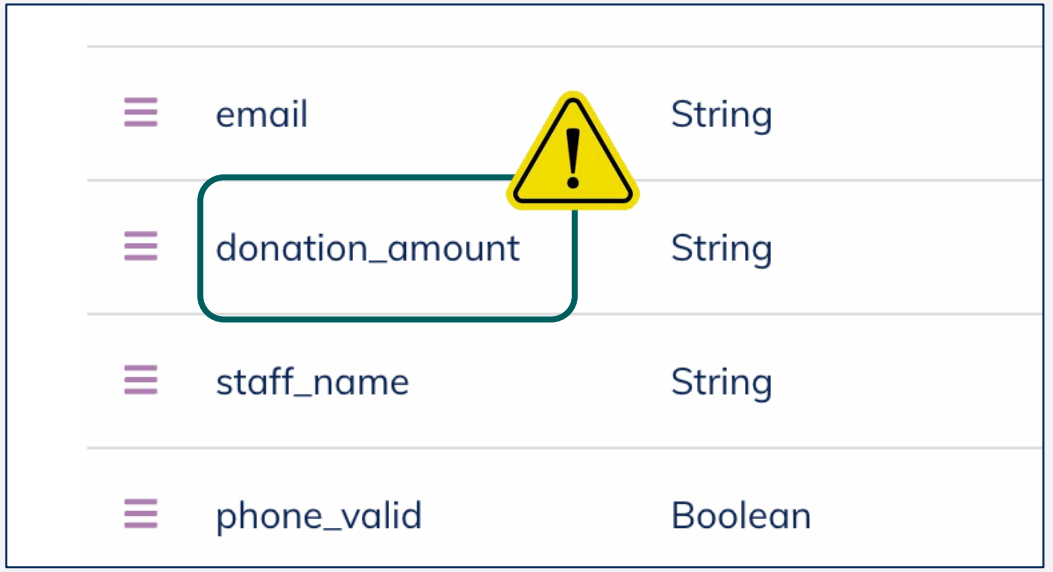
Column headers must be **all lower case, no spaces**



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

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

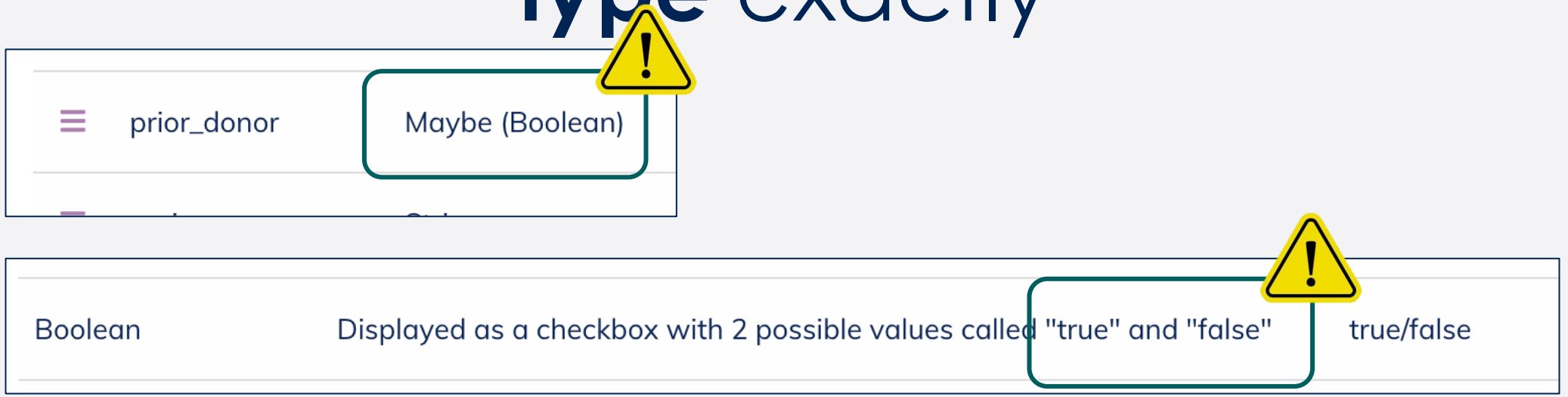




Check this under → **Program Tab;** → **Custom Fields**

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

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



	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

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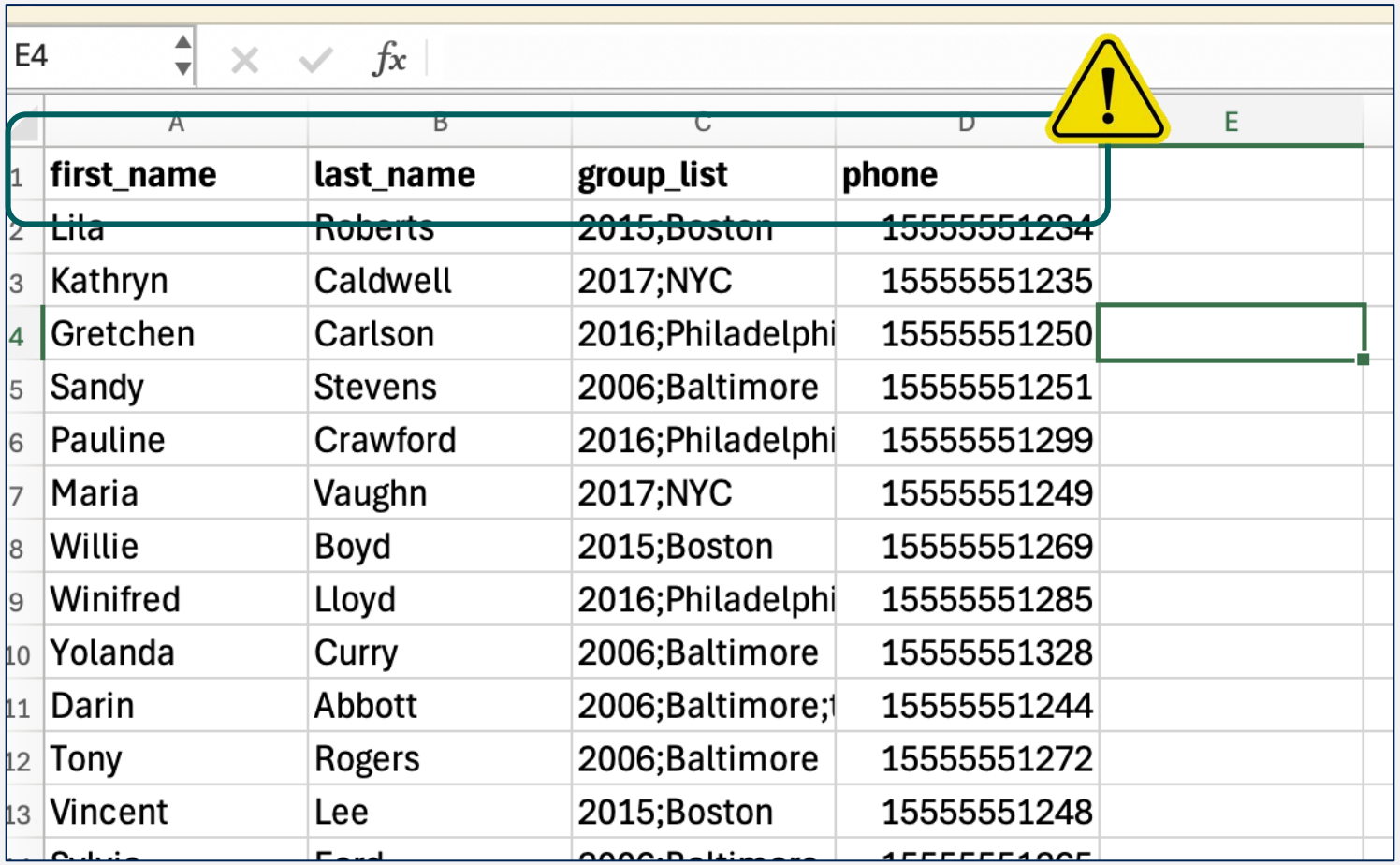
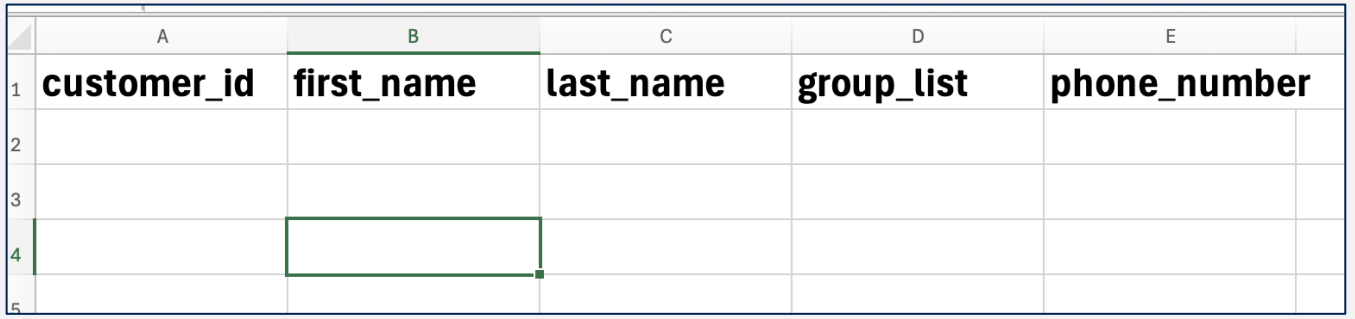


E4

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

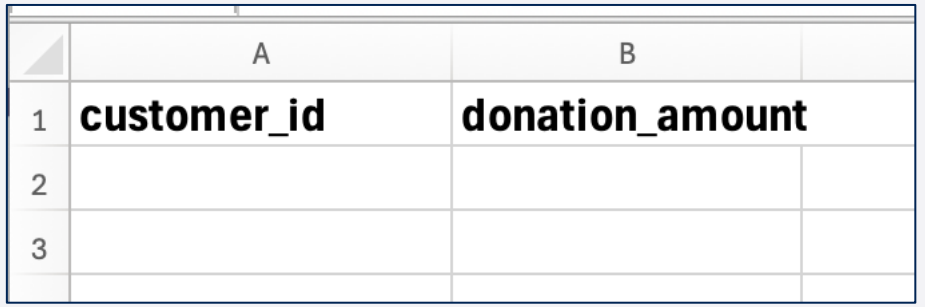
Create Your File

- 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?

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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

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