

Advanced Search

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

Agenda

1. Intro
2. Advanced Search
3. *You Practice!*
4. Examples & Data
5. Tips
6. Q&A
7. Close



Advanced Search

Send your message to
the RIGHT contacts!

“Dorm cleanout week is coming up!”

Who do you want this message to go to?

- **On campus residents!**

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How can you get the right list of contacts?

- ~~Email the RA's~~
- ~~Generate a report in your Student Information System~~
- **Use Advanced Search!**

Advanced Search

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

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

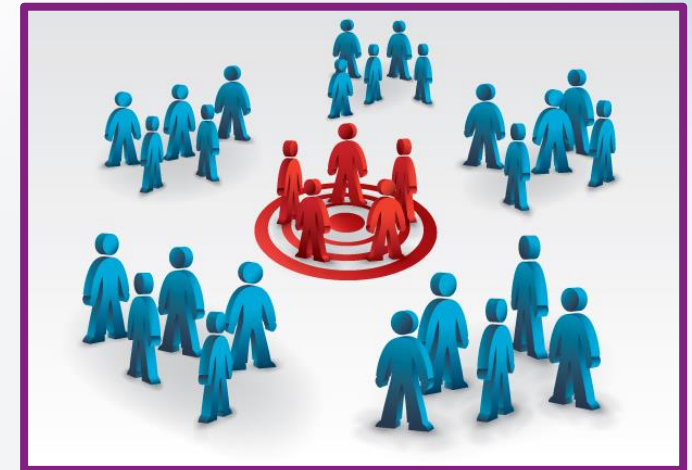
If of the following conditions are met

<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 rules are met

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

If of the following conditions are met

FAFSA Completed

equals

False



Fafsa Submitted

equals

True



+ add another condition

+ add another rule

Cancel

Search

You try!

- Log into your Message account
- Go to contacts and if needed, select your program or group
- Select “Advanced Search”
- **Run a search that will show all current active contacts**

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The screenshot shows the 'Advanced Search' modal window. At the top, it says 'Match if All rules are met'. Below that, 'Rule #1' is defined with the condition 'active equals True'. There are options to 'rename rule' and 'delete rule'. At the bottom, there are 'Cancel' and 'Search' buttons. The background shows a list of contacts with columns for name, email, and status.

Advanced Search ✕

Match if rules are met

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

If of the following conditions are met

✕

[+ add another condition](#)

[+ add another rule](#)

Armstrong Christopher Oct 24, 2025, 7:59:20 PM never

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

Check For Understanding #1

If I want to send a message to students who:

- Started FAFSA
- AND have NOT completed it

Should I use **ALL** or **ANY**?

Check For Understanding #1

If I want to send a message to students who:

- Started FAFSA
- AND have NOT completed it

Should I use **ALL** or **ANY**?

- Answer: **ALL** (they must meet both conditions)

Check For Understanding #2

If I want to message students who are:

- Business majors
- OR Pre-law majors

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Should I use **ALL** or **ANY**?

Check For Understanding #2

If I want to message students who are:

- Business majors
- OR Pre-law majors

Should I use **ALL** or **ANY**?

- Answer: **ANY** (either condition works)

Check For Understanding #3

If I use **ANY**, how many conditions does a contact need to meet?

A. All

B. At least one

Check For Understanding #3

If I use **ANY**, how many conditions does a contact need to meet?

A. All

B. At least one

Answer: B (at least one)

Test your knowledge!

Answer in the poll.

1. If I use ALL, what happens to my audience size? (Single choice)

- It gets bigger
- It gets smaller

2. You want to message students who meet both criteria:

- Have a GPA above 3.0
- Submitted their application (Single choice)

- Use ANY
- Use ALL

3. You have a message relevant to members of the graduating classes...

- 2023
- 2024
- 2025 (Single choice)

- Use ANY
- Use ALL

4. You completed your search and it came back with Zero results?

What went wrong? (Single choice)

- You can't use 3 different search criteria
- You can't have two rules with the same field
- Shouldn't use ALL - Students cannot meet this criteria because they can't be both INSTATE and OUT OF STATE

1. If I use ALL, what happens to my audience size? (Single choice)

It gets bigger

It gets smaller

2. You want to message students who meet both criteria:

- Have a GPA above 3.0

- Submitted their application (Single choice)

Use ANY

Use ALL

3. You have a message relevant to members of the graduating classes...

- 2023

- 2024

- 2025 (Single choice)

Use ANY

Use ALL

4. You completed your search and it came back with Zero results?

What went wrong? (Single choice)

You can't use 3 different search criteria

You can't have two rules with the same field

Shouldn't use ALL - Students cannot meet this criteria because they can't be both INSTATE and OUT OF STATE

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 items: Messages, **Contacts** (highlighted with an orange arrow), Programs, Analytics, Implementation HE, a gear icon, a calendar icon, and a question mark icon. Below the navigation bar, there is a search bar with the text "Search contac" and a magnifying glass icon. To the right of the search bar are two buttons: "More Actions" and "New Message" with a dropdown arrow. Below the search bar is a link for "advanced search". On the left side, there is a "PROGRAMS" section with a link for "ALL | NONE". Under "PROGRAMS", there are four items: "Admissions 2027" (checked with a purple checkbox and highlighted with an orange arrow), "Admissions 2026", "Financial Aid", and "Registrar". The main content area is titled "Contacts (111)" and has an "Actions" dropdown menu and navigation arrows. Below this is a table with the following columns: ACTIVE, LAST NAME, FIRST NAME, LAST OUTBOUND, and LAST INBOUND. The table contains five rows of contact data:

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”

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The screenshot shows the Modern Campus Message interface. At the top, there is a purple navigation bar with the logo and menu items: Messages, Contacts, Programs, Analytics, Implementation HE, a gear icon, a calendar icon, and a question mark icon. Below the navigation bar, on the left, is a sidebar with a 'SEARCH' section containing a search input field and a link for 'advanced search' which is highlighted with a red arrow. Below the search section is a 'PROGRAMS' section with a list of programs: Admissions 2027 (checked), Advising, Financial Aid, and Registrar. The main content area is titled 'Contacts (111)' and features a table with columns: ACTIVE, LAST NAME, FIRST NAME, LAST OUTBOUND, and LAST INBOUND. The table contains five rows of contact information.

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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The screenshot shows the 'Advanced Search' dialog box. At the top, there are buttons for 'More Actions' and 'New Message'. The dialog title is 'Advanced Search' with a close button (X) in the top right corner. Below the title, it says 'Match if rules are met'. Underneath, there is a section for 'Rule #1' with links for '(rename rule)' and '(delete rule)'. Below the rule, it says 'If of the following conditions are met'. There are two links: '+ add condition' and '+ add another rule'. A red arrow points to the '+ add condition' link. At the bottom left, there is a warning icon and the text 'All conditions must be filled out to continue.'. At the bottom right, there are 'Cancel' and 'Search' buttons.

Select your criteria

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Advanced Search [X]

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]

+ 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 rules are met

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

If of the following conditions are met

✕

[+ add another condition](#)

[+ add another rule](#)

Add additional rules or criteria (optional)

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Advanced Search [Close]

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

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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 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



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

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The screenshot shows the Modern Campus Message interface. At the top, there is a purple navigation bar with the logo and menu items: Messages, Contacts, Programs, Analytics, Implementation HE, a gear icon, a calendar icon, and a question mark icon. Below the navigation bar, on the left, is a search section with a search bar containing "Search contac" and a dropdown arrow. Below the search bar are filter rules: "any of these rules:", "GPA > 3.0", and "Financial Aid". There are links for "add or edit rules" and "clear all". Below the filters is a "PROGRAMS" section with "ALL | NONE" and a list of programs: Admissions 2027, Advising (checked), Financial Aid, and Registrar. The main content area is titled "Contacts (89)" and contains a table with columns: ACTIVE, LAST NAME, FIRST NAME, LAST OUTBOUND, and LAST INBOUND. The table lists several contacts, including Acosta, Andrews, Arroyo, Ayala, and Bautista. Above the table, there are two buttons: "More Actions" and "New Message". A dropdown arrow on the "New Message" button is highlighted with a red mouse cursor. A tooltip menu is open below the "New Message" button, showing the option "Send to current results", which is also highlighted with a red mouse cursor.

Compose and send or schedule your message

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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

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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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The screenshot shows the 'modern campus message' interface with the 'Contacts' tab selected. On the left, there is a search bar with the text 'Search contac' and a magnifying glass icon. Below the search bar is a link for 'advanced search'. Underneath is a 'PROGRAMS' section with 'ALL | NONE' filters. A list of programs is shown: 'Admissions 2027' (checked), 'Advising', 'Financial Aid', and 'Registrar'. The main content area displays 'Contacts (111)' and a table with columns for 'ACTIVE', 'LAST NAME', and 'FIRST NAME'. Two contact entries are visible: 'Adams, Deborah' and 'Alexander, Benjamin'.

<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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The screenshot displays an 'Advanced Search' modal window. At the top, it says 'Match if All rules are met'. Below this, a text input field contains 'Out of state, 3.0 GPA', with '(submit)' and '(cancel)' buttons to its right. This entire row is circled in red. Underneath, there's a section for 'If All of the following conditions are met'. It lists two conditions: 'In State equals False' and 'HS GPA is greater than or equal to 3'. Each condition row has a red 'X' icon for removal. A '+ add another condition' link is visible. At the bottom, 'Rule #1' is shown with '(rename rule)' and '(delete rule)' options. The 'If All' dropdown is also circled in red. The bottom of the screen shows 'Er' and '.com'.


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 

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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A screenshot of the "New Message" form in the Modern Campus interface. The form is titled "New Message" and has a close button (X) in the top right corner. It contains the following fields:

- Send from:** A dropdown menu with the text "Select a program" and a downward arrow icon. This field is circled in red.
- Send to:** A text input field with the placeholder text "Enter the program, group or contact name..."
- Message:** A large text area with the placeholder text "Enter your message...". To the right of the text area, it says "Scheduled for immediate delivery".
- Character count:** "0/1600" with a smiley face icon and a document icon.
- Be Advised:** A notice stating "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:** Two radio buttons: "Now" (selected) and "Future Date".
- Next:** A button labeled "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?

The screenshot shows a user interface for searching contacts. On the left, there is a 'SEARCH' section with a search bar containing 'Search contac' and a magnifying glass icon. Below the search bar, it says 'all of these rules:' followed by two buttons labeled 'Rule #1' and 'Rule #2'. At the bottom of this section are links for 'add or edit rules' and 'clear all'. Below the search section is a 'PROGRAMS' section with a dropdown menu set to 'ALL | NONE'. Underneath, there are four program categories with checkboxes: 'Admissions 2027' (checked), 'Advising', 'Financial Aid', and 'Registrar'. On the right side of the interface, there are buttons for 'More Actions' and 'New Message' with a dropdown arrow. Below these is an 'Actions' button with a dropdown arrow and navigation arrows. The main content area displays 'Contacts (0)' in a large font, which is circled in red. Below this, there is a table header with columns: 'ACTIVE', 'LAST NAME', 'FIRST NAME', 'LAST OUTBOUND', and 'LAST INBOUND'. The table body is currently empty.

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

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Advanced Search [Close]

Match if **All** rule are met

Rule #1 (rename rule) (delete rule)
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 #2 (rename rule) (delete rule)
If **All** of the following conditions are met

- In State equals True

+ add another condition

+ add another rule

Cancel Search

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

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!