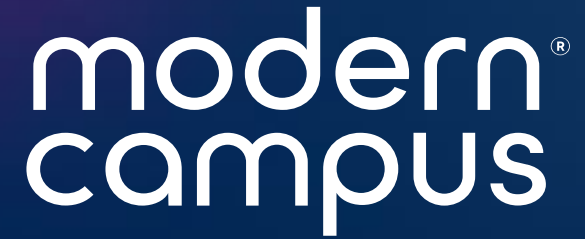


Introduce yourself in the chat! Which institution are you representing?

## Contact Clearing

Get your contacts ready for the new semester!

**Kelsey Seale**



# Contact Clearing

Get your contacts ready for the new semester!

**Kelsey Seale**

# 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!

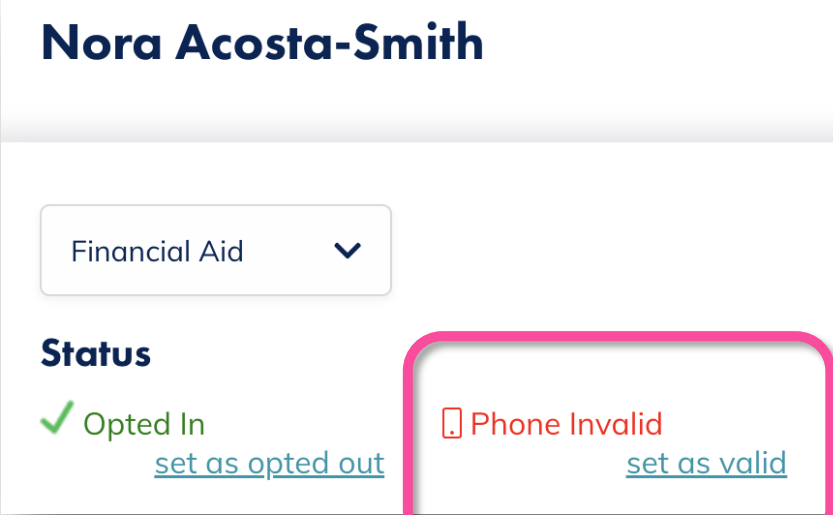
# Agenda

1. Why do a data clean up?
2. Incorrect Phone Numbers
3. Landlines
4. Archiving
5. Opting Out
6. Q&A
7. Close

# Incorrect Phone Number

# Incorrect Phone Number

- Step 1: Mark this contact as “Invalid” to ensure they don’t get any messages.
- Step 2: Verify and update the number.
  - In some cases, it might be a mom’s phone number, and she can provide the correct number. When this happens, you can simply update the phone number
  - Manual Imports: Update the number in your data file (look in SIS or CRM to update manually)
  - Automatic Imports: Update the number in your management system or system of record that communicates with Message.
- Step 3: Revalidate the number – This is NOT automatic!



**Nora Acosta-Smith**

Financial Aid ▼

**Status**

✓ Opted In [set as opted out](#)

☒ Phone Invalid [set as valid](#)

The screenshot shows a contact record for Nora Acosta-Smith. Under the 'Status' section, there are two entries: 'Opted In' with a green checkmark and a link 'set as opted out', and 'Phone Invalid' with a red square icon containing a white 'X' and a link 'set as valid'. The 'Phone Invalid' entry is highlighted with a pink rounded rectangle.

Step 1 AND 3

# Locate landlines

- Export contacts
- Sort the column
- `sys_phone_type`
  - Fixed = a landline
  - Voip = a landline / unreachable number
  - Unknown

Z	AA	AB	AC	AD
<code>sys_msg_1</code>	<code>sys_msg_2</code>	<code>sys_msg_3</code>	<code>sys_carrier</code>	<code>sys_phone_type</code>
FALSE	FALSE	FALSE	UNKNOWN	UNKNOWN
FALSE	FALSE	FALSE	UNKNOWN	FIXED
FALSE	FALSE	FALSE	UNKNOWN	FIXED
FALSE	FALSE	FALSE	UNKNOWN	UNKNOWN
TRUE	FALSE	FALSE	UNKNOWN	UNKNOWN
FALSE	FALSE	FALSE	UNKNOWN	VOIP
FALSE	FALSE	FALSE	UNKNOWN	UNKNOWN
FALSE	FALSE	FALSE	UNKNOWN	UNKNOWN
TRUE	FALSE	FALSE	UNKNOWN	UNKNOWN

# Demo

- **Incorrect Number**
  - Go to a contact
  - Show how to set as invalid
  - Show how to set as valid
- **Locate Landlines**
  - Pull up Advising Implementation HE Original
  - Sort sys\_phone\_type

# Data Clean-Up

# New to Data Clean-Up?

Contact support to strategize!



# Data Clean-Up Methods

Recommended Strategy

PROGRAMS ALL | NONE

- Advising
- Cricket Student Success
- Financial Aid

ALL | NONE

0 ARCHIVED

- 2020
- 2021
- 2022
- 2023
- Alexis

Archive

**Nora Acosta-Smith**

Financial Aid

**Status**

Opted In [set as opted out](#)

Phone Invalid [set as valid](#)

Opt-Out



Delete

# Archiving vs. Deleting

- Archiving (keep your data):
  - Retains all data within the messaging system.
  - Can be performed by program or account admin.
  - Moves contact between groups or opts them out.
- Deleting (delete your data):
  - Done by message support.
  - Permanently removes contact data and message history.
  - Recommended only for true duplicates or contacts without message history

# Archiving

- Option 1: Update group\_list via data file upload

- Pull list of inactive individuals from your CRM

- Update their group\_list to a new group

- group\_list ideas

- Inactive
- Archive
- Graduated
- Make it easy to see by making the group\_list all caps!

- Option 2: Opt-out inactive contacts

- USE CAUTION!
- Ensures 100% these contacts will NOT receive message
- If you might want to contact these folks again EVER, do not opt them out! 😊

- Option 3: Mark as "phone invalid"

Contacts > Contact Details

## Willie Alyssa-Smith

Alumni Relations ▾

**Status**

✓ Opted In [set as opted out](#)

☑ Phone Valid [set as invalid](#)

# Archiving: Update the Contact's group\_list

- Works well if you have a lot of counselor level users
- No counselors have access to the **ARCHIVE** group\_list
- Admin will always exclude ARCHIVE group from program level messages

	A	B	C	
1	<b>first_name</b>	<b>last_name</b>	<b>group_list</b>	<b>ph</b>
2	Lila	Roberts	ARCHIVE	
3	Kathryn	Caldwell	ARCHIVE	
4	Gretchen	Carlson	ARCHIVE	
5	Sandy	Stevens	ARCHIVE	
6	Pauline	Crawford	ARCHIVE	
7	Maria	Vaughn	ARCHIVE	
8	Willie	Boyd	ARCHIVE	
9	Winifred	Lloyd	ARCHIVE	
10	Yolanda	Curry	ARCHIVE	
11	Darin	Abbott	ARCHIVE	
12	Tony	Rogers	ARCHIVE	
13	Vincent	Lee	ARCHIVE	

# Demo Creating an Archive Grouplist

# Opt-Out Your Contacts

Messages Contacts Programs Analytics Implementation Alumni

More Actions New Message

Contacts (0)

ACTIVE	LAST NAME	FIRST NAME	LAST OUTBOUND	LAST INBOUND
<input type="checkbox"/>	Roberts	Lila	Sep 15, 2020, 4:07:05 PM	Sep 15, 2020, 4:07:05 PM

Contacts > Contact Details

### Lila Roberts

Alumni Relations

**Status**  
X Opted Out  
[set as opted in](#) Phone Valid

**Details**

Customer ID  
SV-1

Signalvine ID: 22530076-f789-11ea-a74b-0e7e55a43209

First Name: Lila Last Name: Roberts

Phone Number: +1(555) 555-1234 Timezone: US/Eastern

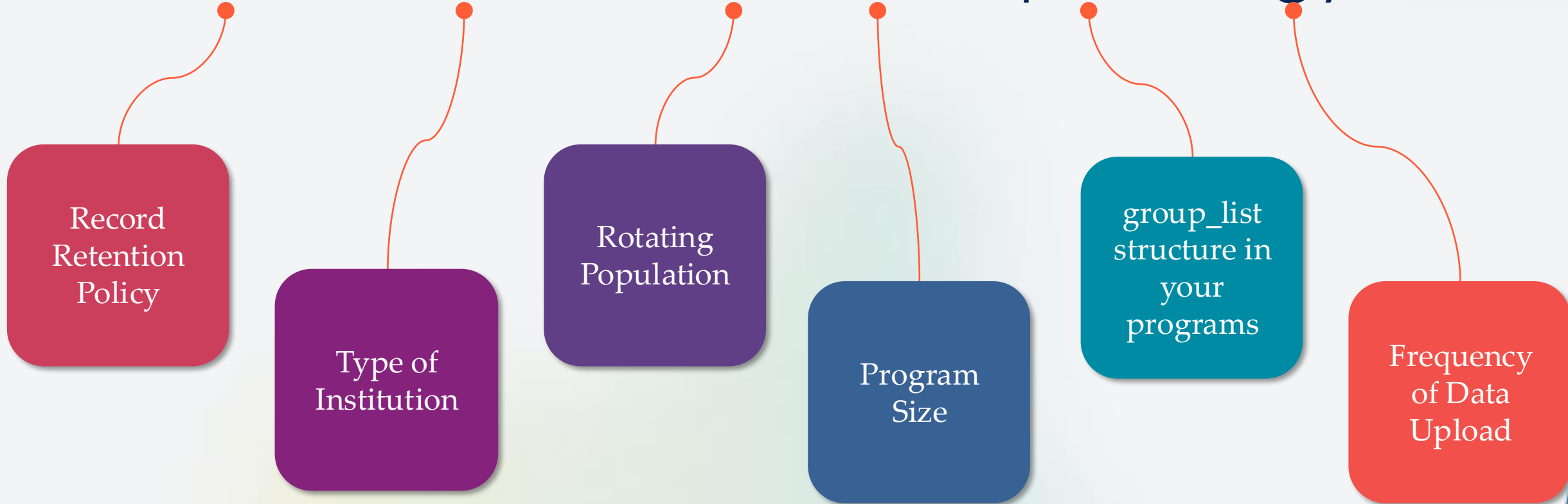
**Groups**

report-e480e853

first_name	last_name	group_list	phone	timezone	active	current_city	prior_d
Lila	Roberts	2015;Boston	15555551234	US/Eastern	FALSE	Boston	TRUE
Kathryn	Caldwell	2017;NYC	15555551235	US/Eastern	FALSE	Boston	TRUE
Gretchen	Carlson	2016;Philadelphia	15555551250	US/Eastern	FALSE	Boston	FALSE
Sandy	Stevens	2006;Baltimore	15555551251	US/Eastern	FALSE	Boston	FALSE

# Demo Opting Out Contacts

# What affects data clean up strategy?



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 are your mini goals for texting?

Ensure contacts are aware of campus resources.

Remind students of outstanding balances.

Stay connected with alumni and increase donations.

Help students with the application process.

Make students feel connected and provide advice.