



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.

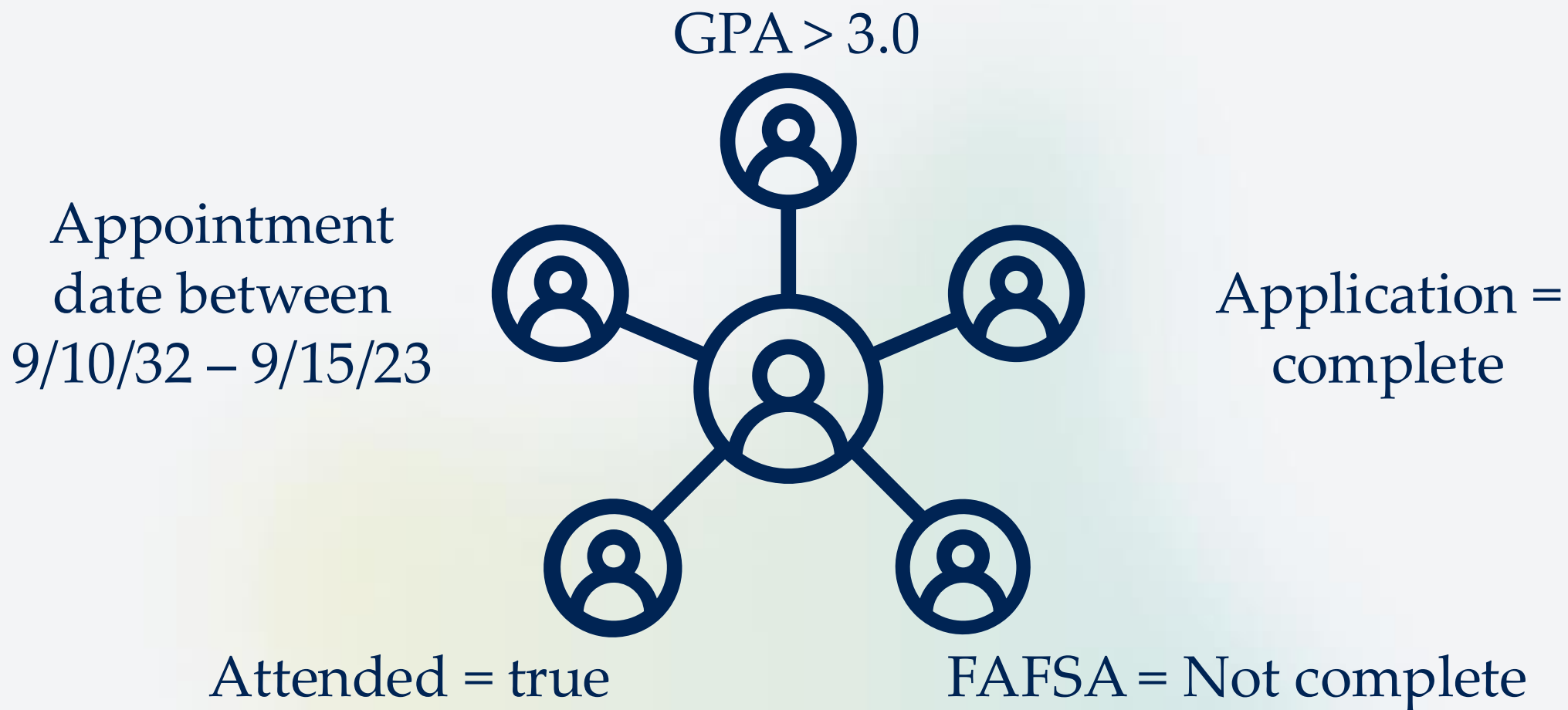
6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!

# 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.



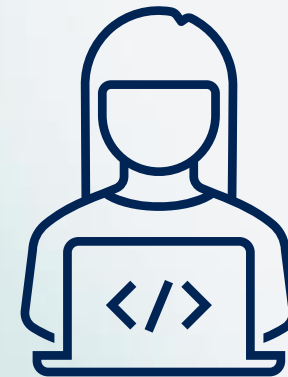
## Step 1

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

AutoSave [off] | Implementations HE Admissions Contact Data

Home | Insert | Draw | Page Layout | Formulas | Data | Review | View | Automate | Acrobat

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

P75 | fx | 91cd79b8-e312-11ea-a74b-0e7e55a43209

	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	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!

## Manage Fields for Coaching

Add Custom Field

	<u>DISPLAY NAME</u>	<u>TYPE</u>	<u>VARIABLE NAME</u>	<u>HIDDEN</u>	<u>READONLY</u>	<u>EDIT</u>
☰	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

The screenshot shows the 'Implementation FIE' header with a gear icon. Below it are navigation links: 'Message Calendar', 'Settings', 'Add Single Contact', 'Export Contacts', 'Manage Fields', 'Import Contacts', 'Autoresponder', and 'Phone Numbers'. The main heading is 'Manage Fields for Admissions' with an 'Add Custom Field' button. A table lists existing fields:

	DISPLAY NAME	TYPE	VARIABLE NAME	HIDDEN	READONLY	EDIT
☰	App Status	String	app_status	●	●	✎
☰	Applicati...	Maybe (B...	applicati...	●	●	✎

The 'PROGRAMS' sidebar on the left is circled in green and contains the following options:

- Admissions
- Advising
- Financial Aid
- Registrar

# 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

The screenshot shows an Excel spreadsheet titled 'Implementations HE Admissions Contact Data'. The 'General' tab is active. Below the ribbon, a yellow warning bar states: 'This workbook in the comma-delimited (.csv) format. To preserve...'. The spreadsheet data is as follows:

	I	J	K	
	<b>in_state</b>	<b>recruiter</b>	<b>app_completion</b>	
	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 Fields

User generated  
Enhance data management and communication strategies

# 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"> <li>• GPA</li> <li>• College</li> <li>• High School</li> <li>• Student Type</li> <li>• Advisor Name</li> <li>• Advisor Email</li> <li>• FAFSA Completed</li> <li>• FAFSA Started</li> <li>• High School Grad Year</li> <li>• College Major</li> <li>• College Confirmed</li> <li>• Parent Number</li> </ul>	<ul style="list-style-type: none"> <li>• State</li> <li>• Region</li> <li>• Graduating Class</li> <li>• Current field</li> <li>• Preferred name</li> <li>• Birthday</li> </ul>	<ul style="list-style-type: none"> <li>• Advisor Name</li> <li>• Enrolled Term</li> <li>• Preferred name</li> <li>• Primary major</li> <li>• Anticipated degree date</li> <li>• Major 1</li> <li>• Major 2</li> <li>• Advisor Phone</li> <li>• Advisor Email</li> <li>• Appointment Date/Time</li> </ul>

Financial Aid	Admissions	Residence Life
<ul style="list-style-type: none"><li>• FAFSA submitted</li><li>• FAFSA completed</li><li>• Award</li><li>• Requirements satisfied</li><li>• GPA</li><li>• Veteran</li></ul>	<ul style="list-style-type: none"><li>• App status</li><li>• App owner</li><li>• Campus</li><li>• Academic area</li><li>• City</li><li>• In state</li><li>• HS GPA</li></ul>	<ul style="list-style-type: none"><li>• Residency status</li><li>• Building</li><li>• Registration</li><li>• Active athlete</li></ul>

What are fields you currently using, or want to **start** using, for contact segmentation?

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!

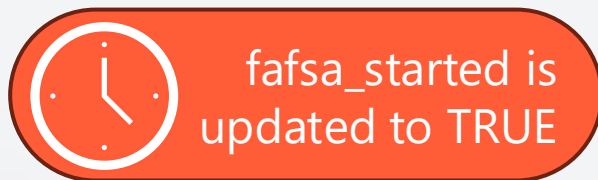
#	Date/Time	Condition	Content	Save Responses to Data Field
Application_graduation	Last_contribution_date + 3 Days		[first_name] Thank you so much for your generous contribution on [last_contribution_date]. Your support for Cricket University continues to make our vision a reality! You can see our plans at <a href="http://www.cu.edu/plans">www.cu.edu/plans</a>	

# 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><b>Part 1:</b> Hi [first_name]! This is [counselor_name], your Admissions Counselor from Signal Vine U. I'll send important info &amp; reminders to help you through our admissions process. Are you still interested in applying to Signal Vine University?</p> <p><b>Response to Yes:</b> Awesome, the application is due in 3 weeks!</p> <p><b>Response to No:</b> Thanks for letting us know. If you need my help feel free to reach out!</p>	Save Yes/No response to <b>interest_check</b>

# 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"/>
<a href="#">+ add another condition</a>			

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"/>
<a href="#">+ add another condition</a>			

# 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

Ad

**Hey Beatrice! Have you declo**

Ad

BH n

Beatrice Hunt · 8/23/19 | 03:43 PM

You still have some time to decide! Do you

Ad

# 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

String

Boolean

#

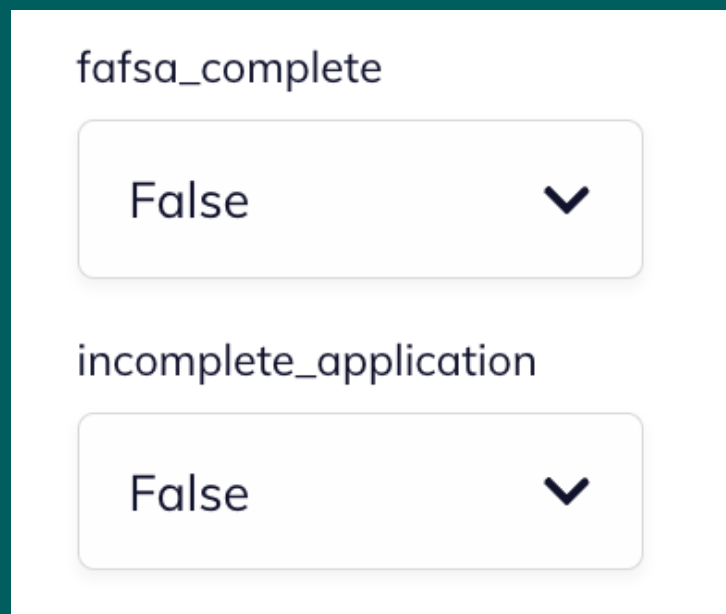
DateTime

campaign	<input type="text" value="FAFSA 5.22.23"/>
Advisor	<input type="text" value="Willie"/>

# Field Type: Boolean

True / False

Allows you to use data as a variable



A screenshot of a form with two Boolean fields. The first field is labeled 'fafsa\_complete' and has a dropdown menu with 'False' selected. The second field is labeled 'incomplete\_application' and also has a dropdown menu with 'False' selected.

String

Boolean

#

DateTime

# 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 

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

app.signalvine.com/sv/programs/manage-fields

modern campus message

Messages Contacts **Programs** Analytics

Implementation HE

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"/>	
Application Waiver	Maybe (Boolean)	application_waiver	<input type="radio"/>	<input type="radio"/>	
nickname	String	nickname	<input type="radio"/>	<input type="radio"/>	
Scholarship	Maybe (Boolean)	scholarship	<input type="radio"/>	<input type="radio"/>	

# 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.

Cancel

Add Field

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	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!

The screenshot shows the 'Export Contacts' page in the Modern Campus interface. The navigation bar at the top includes '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-sections: 'Autoresponder' and 'Phone Numbers'. The main heading is 'Export Contacts from Alumni Relations'. Underneath, the section is titled 'Export Contact Data'. A descriptive paragraph 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' (which is selected) and 'Only Unreachable Contacts'. The 'All Contacts' option has a sub-description: 'The export will contain all profile data for each contact that you have access to view in this program.' The 'Only Unreachable Contacts' option has a sub-description: 'The export will contain all profile data for any contact that does not have an SMS-enabled phone number.' At the bottom of the form is a teal button labeled '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!

	<b>sys_send_1</b>	<b>sys_carrier</b>	<b>sys_phone_type</b>
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 file save dialog box with 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 expand/collapse arrow, and a standard dropdown arrow.
- File Format:** A dropdown menu showing "Comma Separated Values (.csv)", highlighted with a green border, and a green expand/collapse arrow.
- Online Locations:** A button on the left side of the dialog.
- Options...:** A button below the File Format dropdown.
- Cancel:** A button at the bottom right.
- Save:** A green button at the bottom right.

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

	B	C	D	E
	<b>customer_id</b>	<b>major</b>	<b>Email</b>	<b>donation_am</b>
4 r	10000	Communications		\$50
4 r	10001	Anthropology		\$2

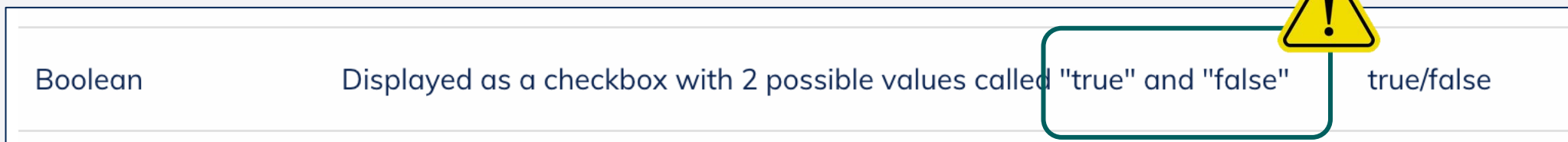
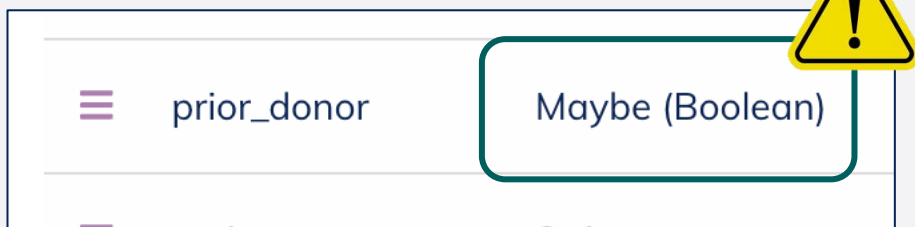
# Column headers must **match your field name 100%**

D	E	F
ail	<b>dollar_amount</b>	staff_na
s	\$500.00	Joe
	\$25.00	Joe
ations	\$80.00	Joe
		Joe
ations	N/A	Kris

☰	email	String
☰	<b>donation_amount</b>	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



	G	H
<b>name</b>	<b>prior_donor</b>	<b>signalv</b>
	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

	A	B	C	D	E
1	<b>first_name</b>	<b>last_name</b>	<b>group_list</b>	<b>phone</b>	
2	Lita	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	
	Sylvia	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	<b>customer_id</b>	<b>first_name</b>	<b>last_name</b>	<b>group_list</b>	<b>phone_number</b>
2					
3					
4					
5					

- Update existing contacts

- customer\_id or signalvine\_id
- The field you want to update!

	A	B
1	<b>customer_id</b>	<b>donation_amount</b>
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

modern<sup>®</sup>  
campus



