

Mongoose User Guide and Best Practices

Nydia Araya, Advisor/Coach

Marlea Louviere, Graduate Assistant

Pan-American Life Student Success Center

Table of Contents

General Information	3
How to Send an Individual Text Message	3
How to Create a Segment, Track as a Campaign, Send a Group Text Message, and Schedule a Message	5
How to Review a Campaign Report for Data Management	10
Best Practices	12
How to Import Contact Information (if applicable)	13
Additional Resources	16

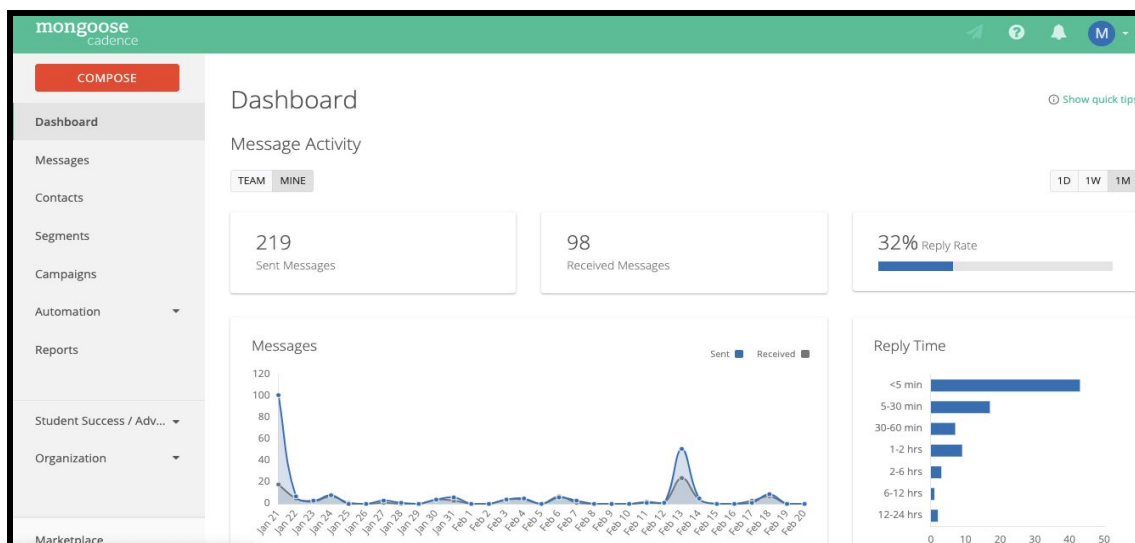
General Information

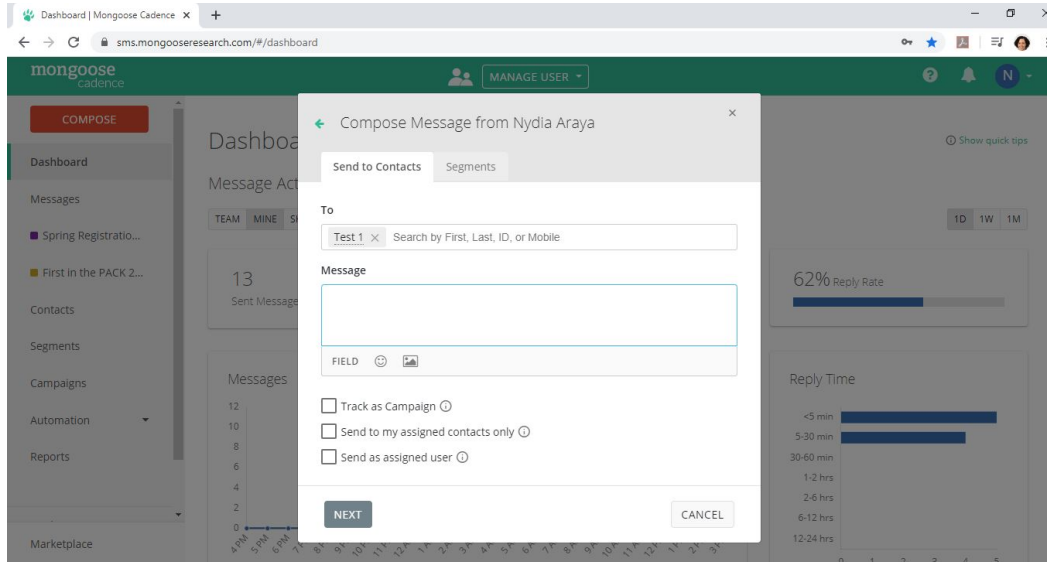
- Mongoose Cadence Website:
<https://sms.mongooseresearch.com/#/login>
- Login Information: Loyola Gmail account and preferred password
 - **Note: You can reset your password if forgotten**

How to Send an Individual Text Message

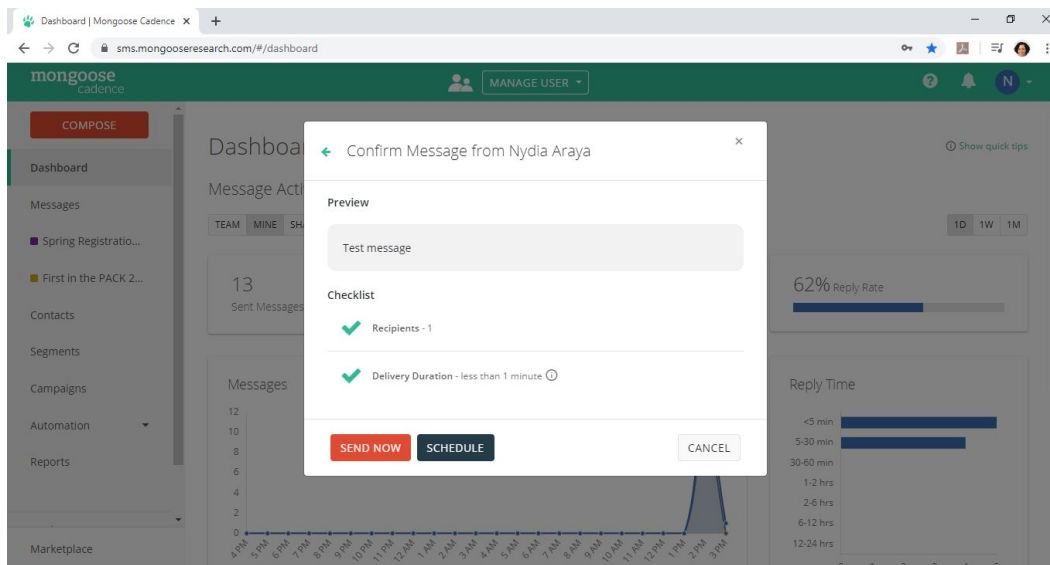
If you would like to check in with a student, provide a specific student with some helpful information, or follow up with a student about a question/ inquiry, it may be helpful to send an individual/personalized text message to that student.

To send an individual text message, click the “**Compose**” button in the top left corner of the screen.





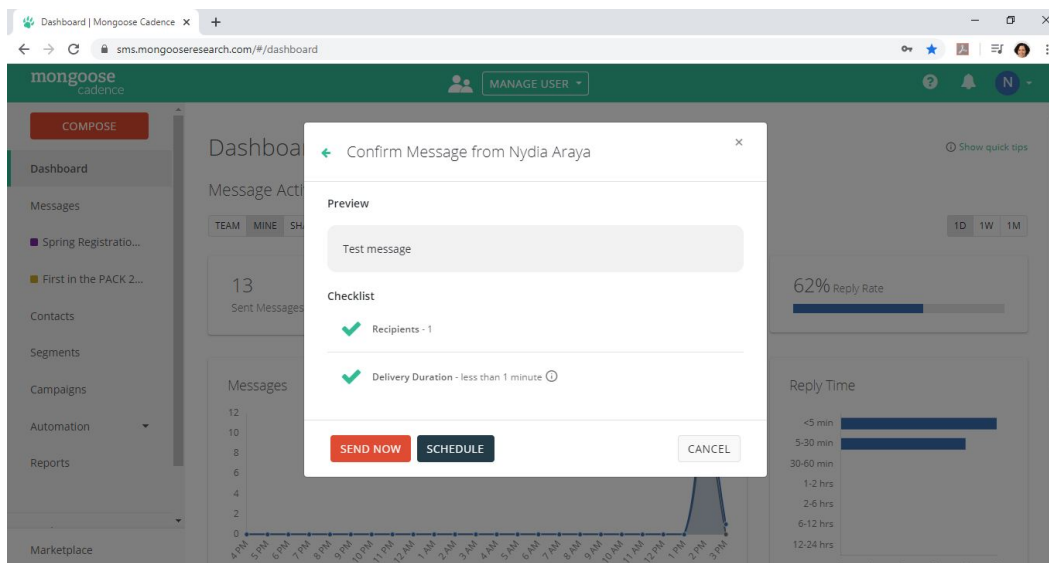
Within the **“Send to Contacts”** tab search for the student you wish to contact. You can find the student by searching by First Name, Last Name, Campus Wide ID, or Mobile Number. If you cannot find the student but have the student Mobile Number, you can manually enter the Mobile Number and compose a message to the student. Then, click **“NEXT.”**



You can select to “**Send Now**” or select “**Schedule**” to have the Mongoose Cadence system send the text message at a preferred time or date.

How to Create a Segment, Track As A Campaign, Send a Group Text Message, and Schedule a Message

Segments can be used to send text messages to an identified group of students on a consistent basis. For example, if you would like to send text messages to your advisees about early warnings, mid term grades, registration, etc., you could message students through the segment easily. You would not have to gather contact information for each student each time you need to send a text message.



Click the **Segments** tab on the left side and it should bring you to this page. Then click the **NEW SEGMENTS** blue button.

After clicking **NEW SEGMENTS**, it should bring you to this page. Next, click the small green tab “**Enter Contact IDs or Mobile Numbers**”

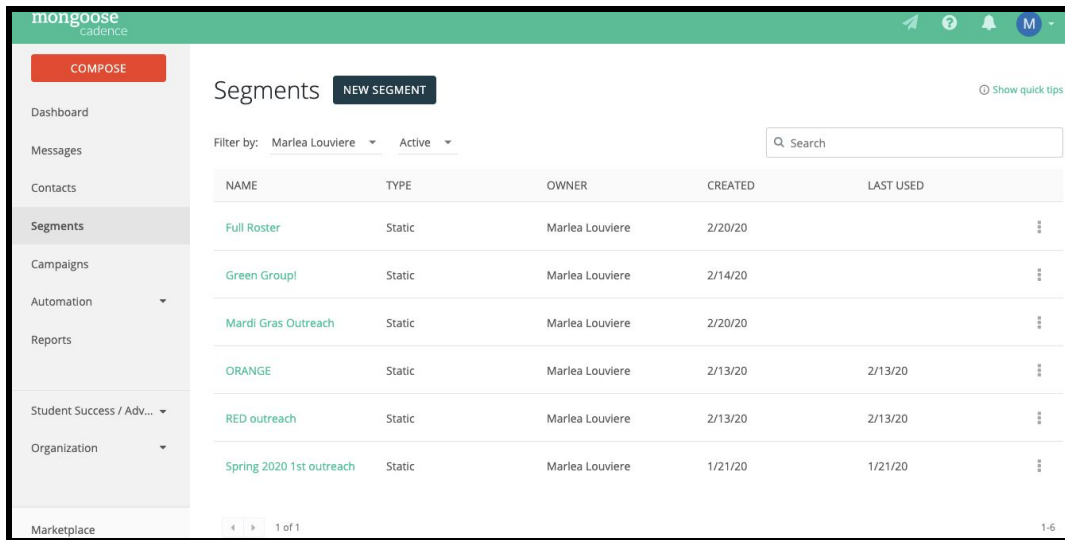
The screenshot displays the 'Segments' page in a CRM interface. On the left is a sidebar with navigation items: Dashboard, Messages, Contacts, Segments (highlighted), Campaigns, Automation, Reports, Student Success / Adv..., and Organization. At the top left of the sidebar is a red 'COMPOSE' button. The main content area is titled 'Segments' and includes a 'NEW SEGMENT' button. Below the title, there are filters for 'Marlea Louviere' and 'Active', and a search box. A table lists the segments:

NAME	TYPE	OWNER	CREATED	LAST USED
Full Roster	Static	Marlea Louviere	2/20/20	
Green Group!	Static	Marlea Louviere	2/14/20	
ORANGE	Static	Marlea Louviere	2/13/20	2/13/20
RED outreach	Static	Marlea Louviere	2/13/20	2/13/20
Spring 2020 1st outreach	Static	Marlea Louviere	1/21/20	1/21/20

At the bottom of the page, there is a 'Marketplace' link on the left and a pagination indicator '1 of 1' in the center, with '1-5' on the right.

Title your group name under **Name**, switch **Identifier Type** to **Contact ID**. Then copy and paste the students campus wide ID numbers you want to include in this group.

After pasting the student Campus Wide IDs, click **CREATE**. It may notify you that errors have occurred. If this occurs, download the errors spreadsheet and review the error details. Student contact information should be imported by your department administrator, but some students could be missing from the database. **Follow up with your department administrator about any errors.**



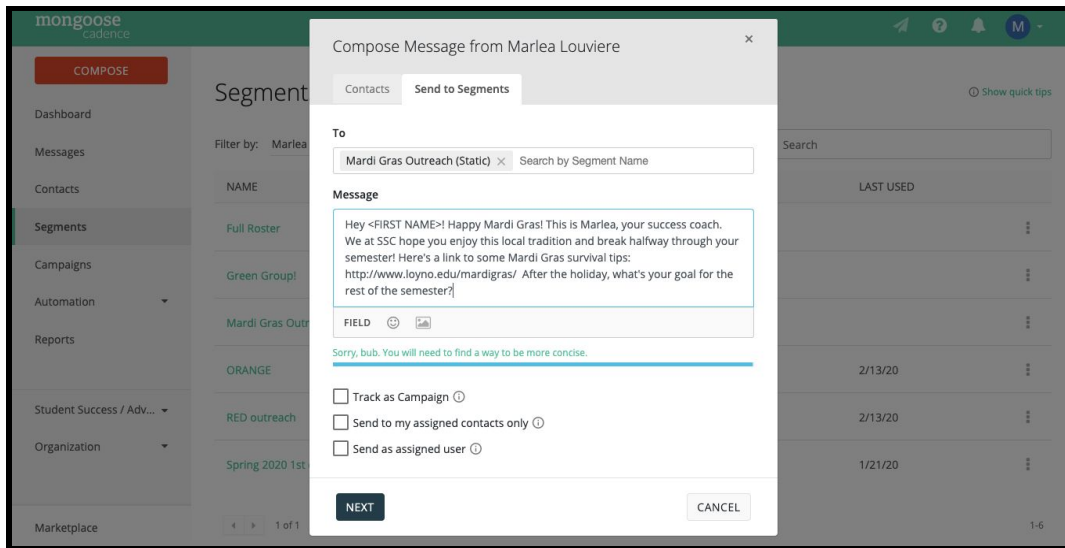
The screenshot shows the 'Segments' page in the Mongoose Cadence interface. The page has a green header with the logo and navigation icons. A sidebar on the left contains menu items like 'Compose', 'Dashboard', 'Messages', 'Contacts', 'Segments', 'Campaigns', 'Automation', 'Reports', 'Student Success / Adv...', and 'Organization'. The main content area is titled 'Segments' and includes a 'NEW SEGMENT' button and a search bar. Below the search bar is a table with the following data:

NAME	TYPE	OWNER	CREATED	LAST USED
Full Roster	Static	Marlea Louviere	2/20/20	
Green Group	Static	Marlea Louviere	2/14/20	
Mardi Gras Outreach	Static	Marlea Louviere	2/20/20	
ORANGE	Static	Marlea Louviere	2/13/20	2/13/20
RED outreach	Static	Marlea Louviere	2/13/20	2/13/20
Spring 2020 1st outreach	Static	Marlea Louviere	1/21/20	1/21/20

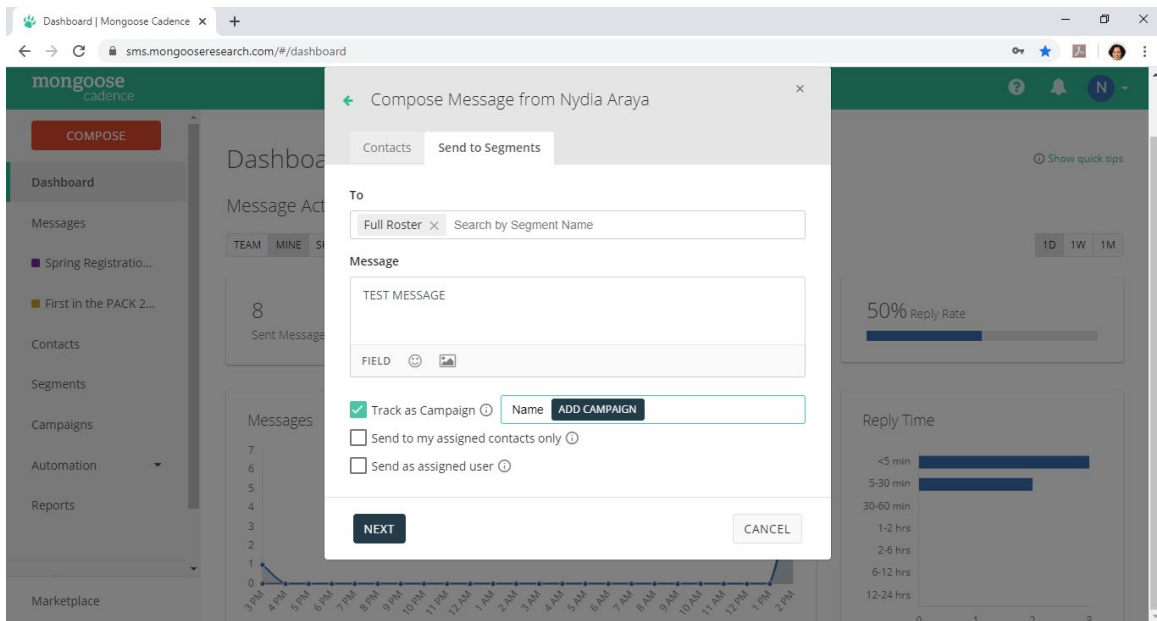
You should then see the group of students you created. On the far right side, click the vertical ellipsis button.



A tab with multiple options will pop up, click **Message**.

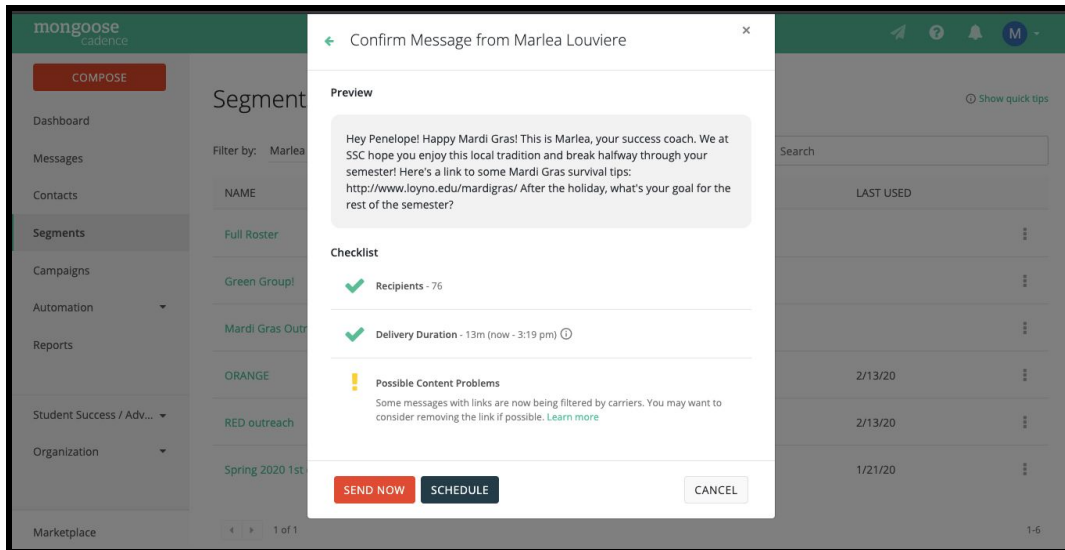


Then type in a message, utilizing the **Field** button, emojis, or a picture for additional features. Above is an example about Mardi Gras safety tips that was sent to first year students.



Make sure that you select “Track as a Campaign,” name the campaign, and select the “add campaign” button. This will allow you to later review a report that includes the number of received messages, the number of replies, and other important information

that may be useful data information when tracking outreach/ communication with students. Then click, **NEXT**.



A **Preview** will pop up, to confirm this is what you want to send. You can press the back arrow to edit, **SEND NOW**, or **SCHEDULE** when you'd like to send. The Checklist will inform you of the recipients, delivery duration, and any problems. After sending, schedule a window of time to respond to messages.

How to Review a Campaign Report for Data Management

A campaign report gathers important data when initiating outreach with a group of students. A report allows you to see how many students received the text message, the percent of replies to the text message, student reply time and other important data. This data can be useful when tracking student outreach, communications and trends within your department.

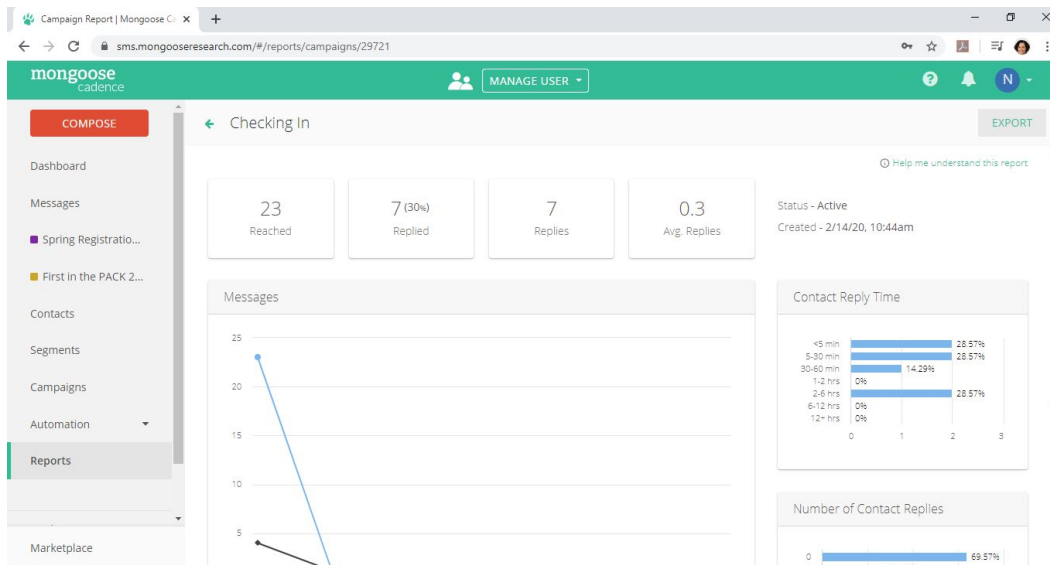
The screenshot shows the 'Campaigns' page in the Mongoose Cadence interface. The left sidebar contains navigation options: Dashboard, Messages, Spring Registratio..., First in the PACK 2..., Contacts, Segments, Campaigns (highlighted), Automation, Reports, and Marketplace. The main content area displays a table of campaigns with the following data:

NAME	OWNER	CREATED
Checking In	Nydia Araya	2/14/20
Coffe and Donuts	Nydia Araya	2/03/20
Coffee and Donuts	Nydia Araya	2/21/20
Fall 2020 registration	Nydia Araya	3/14/20
Fall Registration 2020	Nydia Araya	3/10/20
Introduction	Nydia Araya	1/24/20

In the “Campaigns” tab, find the campaign for which you would like to view the report. On the far right side, click the vertical ellipsis button.

This screenshot shows the same 'Campaigns' page as above, but with the vertical ellipsis button for the 'Checking In' campaign clicked. A dropdown menu is now visible with the following options: View Report, Edit, Message, Archive, and Delete.

Then, click “view report.” A report will generate that includes all data information. If you would like to export this data, you can click the “export” button on the top right of the screen. A .csv file will then automatically download



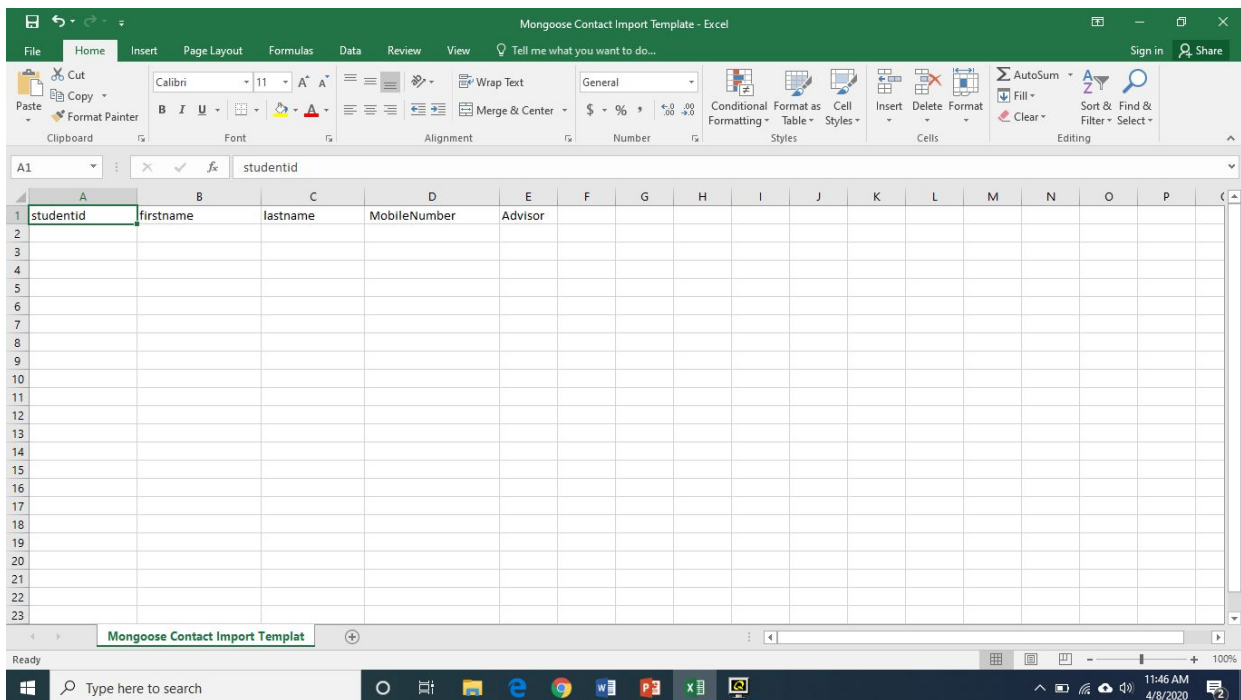
Best Practices

- Text messages should be sent to supplement information that will be provided via email, office hours, appointments, etc. **Text messages should NOT be sent in place of these forms of communications.** For example, a text message can be sent to remind students to register for classes, but an email should follow that includes important information about how to register classes and important deadlines
- Limit text messages to 160 characters or less
- Send intentional, impactful, approachable and engaging text messages
- **Always clarify your position or role within the university** in the text message in order to maintain professionalism within the text message conversation
- Send text messages at appropriate times of day (Monday-Friday during university operational hours)
- **DO NOT** send confidential information to students in a text message. Follow up through email or scheduled appointment to provide this information.
- Student replies will be sent to your Loyola Gmail account. You will need to login to Mongoose to reply, but it is encouraged to create a Mongoose

label within your Gmail inbox so that your email does not become flooded with replies

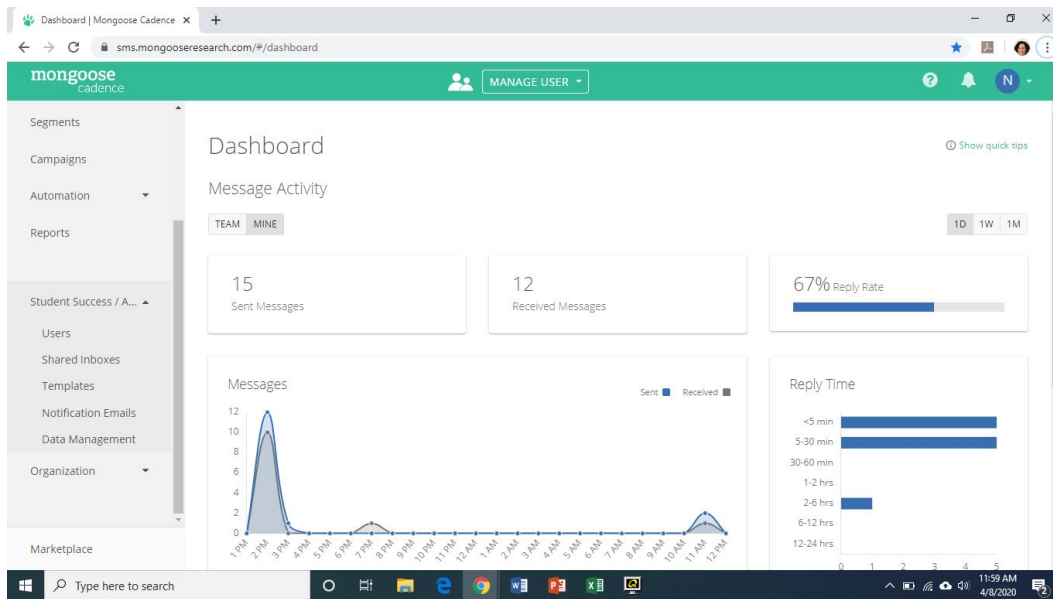
How to Import Contact Information (If applicable with user access)

If you have owner or administrator access within Mongoose Cadence, you will be able to import student contact information for your department. **In order to do this, you will need to create a .csv file that includes the following information for each student: Student ID, First Name, Last Name, Mobile Number, and Advisor**



- **Additional Tips:**
 - **Spreadsheet must be created in the EXACT format displayed above and saved as a .csv file**
 - Default the advisor to your department name for easy import
 - Do not include an dashes or brackets in the mobile number

- Upon import, Mongoose may indicate errors and prompt a spreadsheet of these errors for your review. Please download this file and review the errors. **If 90% of the student contacts were successfully imported, then this is sufficient.** Otherwise, you may want to review your imported spreadsheet, make adjustments and import again. If you need assistance, contact Liz Rainey or Nydia Araya.

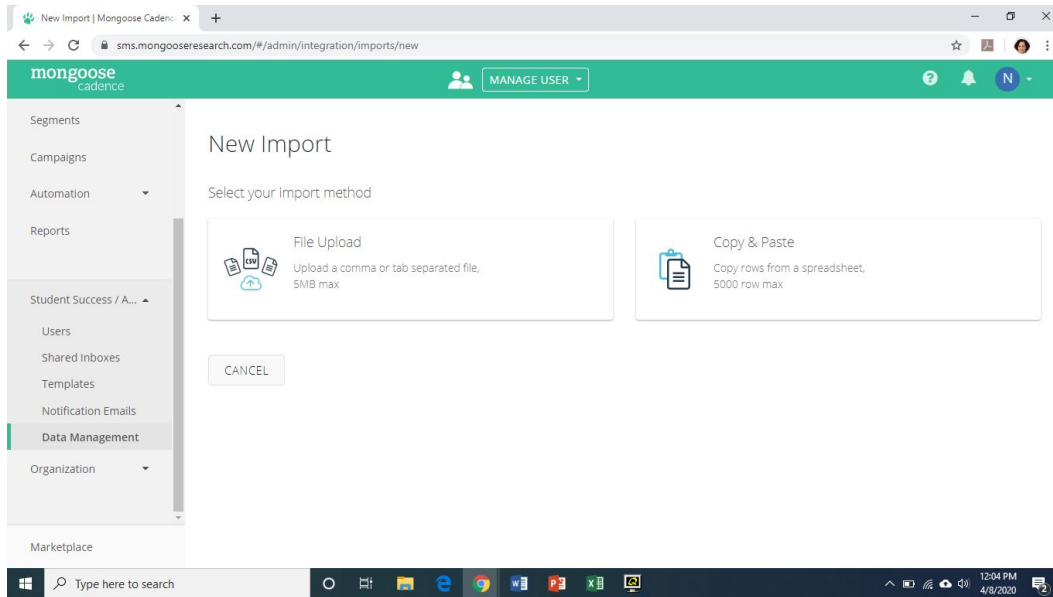


On your dashboard locate the name of your department team on Mongoose Cadence and click the drop down arrow. Then, select **“Data Management.”**

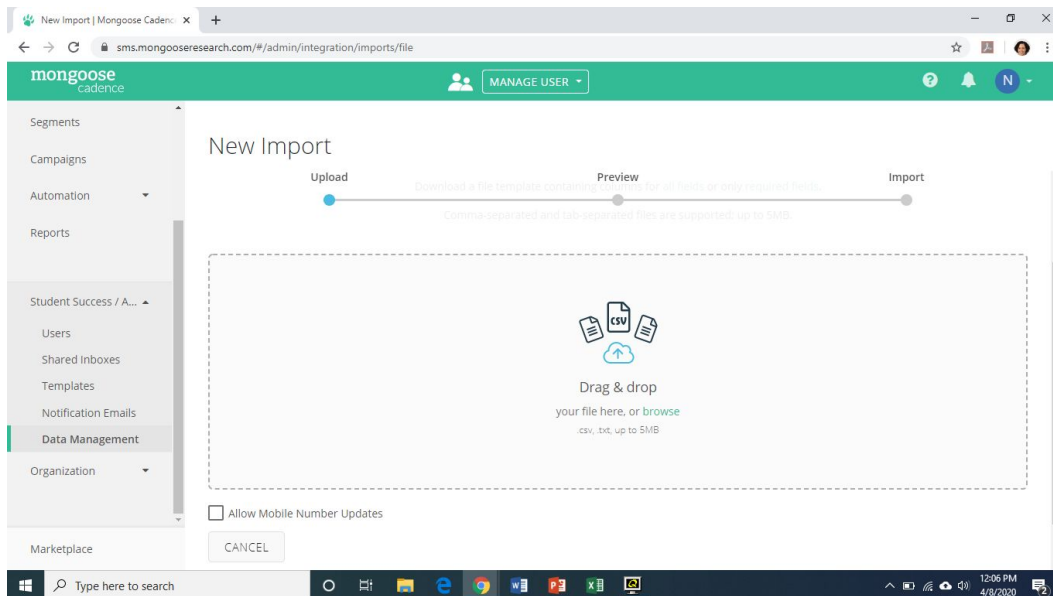
The screenshot shows the 'Data Management' page in Mongoose Cadence. The 'CONTACT IMPORTS' tab is selected. Below the navigation tabs, there is a 'NEW IMPORT' button and an 'Import Log' table.

ID	USER	STATUS	STARTED	COMPLETED	TOTAL	SUCCESS	ERROR
622662	Elizabeth Rainey	Complete	3/26/20, 4:08pm CDT	3/26/20, 4:09pm CDT	2728	484	2244

Once in Data Management, select the “new import” button in the top left corner.



Select “File Upload” as the import method.



Drag and drop the .csv file that includes the student contact information. Only select the “Allow Mobile Number Updates” checkbox if you are completing a

routine update to contact information data within your Mongoose Cadence department team. The upload should take a few minutes to complete. Mongoose Cadence will notify you when complete or notify you of any errors.

Additional Resources

- **Mongoose Cadence Customer Service**
 - Mike Kochczynski
Email: mike@mongooseresearch.com
Phone: (716) 228-4780
- **Mongoose Cadence Academic Affairs Troubleshooting**
 - Elizabeth Rainey
Email: earainey@loyno.edu
 - Nydia Araya
Email: njaraya@loyno.edu
- [Mongoose Cadence Resource Guides](#)
- [Mongoose Cadence Training \(1 hour\)](#)