

Term	Definition
Activity Template	Contains all of the information that is needed to generate individual activities. These activities are created when alert rules that contain the template are triggered.
Alert Rule	A group of one or more conditions that are used to generate an alert
Catch-up Processing	Catch-up processing on engagement activities allows you to complete the activity for any members that are added to the engagement list that is associated with the activity after the activity has been distributed.
Condition	A known risk factor or positive change indicator that can be used individually or in combination as part of a scoring rule or alert rule
Course Score	Indicate a student's success in a specific course section.
Drip Engagement Plan	A type of engagement plan that allow you to schedule the distribution of engagement activities with specific offset numbers.
Engagement Activity	A single communication in an engagement plan. For each engagement activity, you can also identify drip engagement plan, automatic distribution, catch-up processing, and engagement list filtering details.
Engagement List	Consists of students or other contacts. These might be students or other contacts to whom you want to assign scores or send communications.
Engagement Plan	Contains planning tasks and activities that promote communication and interaction with students and other contacts. Engagement plans can be large-scale communication efforts sent to all students or contacts, or smaller distributions that are targeted to specific groups of students or contacts.
Mobile Notification Template	Contains information about the mobile notification that should be sent to students. The mobile notification is sent when the alert rule that it is added to is triggered.
Preconfigured Data Templates	CRM Advise delivers preconfigured data templates that you can install and then customize to meet the needs of your institution. Each data template represents an alert rule, condition, engagement list, engagement plan, or scoring plan and all of its associated components, if applicable.
Score	A score indicates how a student is performing in relation to a CRM Advise scoring plan.
Score Component	The scoring rules that were used to generate a score
Scoring Rule	A group of one or more conditions that are used in a scoring plan.
Student Profile	Has details about a student. Includes data from the ERP and LMS.
Success Engine	The CRM Advise component that evaluates students for known conditions and generates student scores and alerts.
Success Manager	Person responsible for overall student success and retention efforts at an institution. This person could be a Director of Advising, Director of Student Success and Retention, etc.
Success Score	Indicate a student's overall success at your institution.

Task Template	Contains information about a task that should be performed. The task is created when the alert rule that the task template is added to is triggered.
Workflows	Allow you to automate system processes to ensure that specific actions are performed consistently and to minimize repetitive tasks.