



## Navigate360: Using (Email) Appointment Campaigns (with Nudges)

*Appointment campaigns sends a personalized email to students with a link to click which will offer them appointment days/time as defined by the advisor initiating the campaign. Nudges replace the Compose a Message functionality and allow for more communication on an automated basis.*

### 1. Create campaign availabilities before creating an appointment campaign

- See the *Create Availabilities* Navigate guide to edit or create a new availability. Create campaign availability in one of three ways:
  - Click *Edit* to the right of an existing availability to add campaigns to existing appointment availability. Under *What Type of Availability is This?* click *Campaigns*.
    - **NOTE:** Campaign appointments and other appointments will be intermingled on the calendar.
  - Use the *Copy Time* feature in the *Actions* menu to create an availability which mirrors an existing availability. Under *What Type of Availability is This?* click *Campaigns*.
    - **NOTE:** If the existing availability is not also altered, campaign appointments and other appointments will be intermingled on the calendar.
  - Create an availability from scratch using the *Create Availabilities* guide. Under *What Type of Availability is This?* click *Campaigns*.
    - **NOTE:** If the existing availability is not also altered, campaign appointments and other appointments will be intermingled on the calendar.

### 2. Initiate a new appointment campaign

- Click the *Campaigns*  icon from the navigation menu on the left side of the screen.
- In the *Student Campaigns* box on the left side of the screen, click + Add New  under *Appointment Campaigns*.

### 3. Define the appointment campaign parameters

- Under *Define Campaign*, enter:
  - *Campaign Name*: be as specific as possible. Include the goal of the campaign, the student population, the semester in which the campaign will be launched, and your initials to easily find which campaign belongs to you.
    - **EXAMPLE:** *Fall 2022 Enrollment Academic Major Appointments - RDS*
  - *Care Unit*: Select the appropriate Care Unit from the available list.
  - *Location*: Select a major location for the Campaign
    - **NOTE:** for a 'combined' location (listing multiple majors), please submit a Navigate Configuration Request [Form](#) on the EAB Navigate advisement page (<https://www.etsu.edu/advisement/navigate.php>).
  - *Service*: Select an appropriate Service for the appointment campaign.
    - **EXAMPLE:** *02 Plan Courses for Next Semester/Term*
  - *Begin Date*: select the date which students may begin meeting for this location/service.
  - *End Date*: select the date which the campaign will end for this location/service.
    - **EXAMPLE:** Two weeks after registration windows have closed
  - *Appointment Limit*: The maximum number of appointments a student can make for this service at this location by clicking the campaign link.

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- [Appointment Length](#): The length of time which will be scheduled when a student makes an appointment through the campaign link.
  - [Slots Per Time](#): For one-on-one advising sessions, select 1. For group advising sessions, select the number of students who may attend each appointment.
- Click [Continue](#).

**Define Campaign**  
Set up your campaign. Specify your appointment details and timing.

**Campaign Configurations**

Campaign Name \*  Instructions or Notes for Landing Page:

Care Unit: \*  Location: \*

Service: \*

**Appointment Configurations**

Appointment Limit: \*  Appointment Length: \*

Slots Per Time: \*

Allow Scheduling Over Courses

Staff Reminders:  Email  Text Recipient Reminders:  Email  Text

**Scheduling Window**  
Campaign appointments and events can be scheduled on any date within the scheduling window. For one-time events, select the same date for the start and end dates. Your campaign will begin automatically on the date of your first nudge.

Start Date: \*  End Date: \*

**Launch Date**  
This Launch Date will be the date that the "Welcome Message" will send. If students are added to your Campaign after this launch date via automation, the "Welcome Message" will send to that student as soon as they are added.

### 4. Select recipients for (add students to) the campaign

- To select all assigned students, scroll to the bottom of the page and click the checkbox for [My Students Only](#).
- To select a subset of students, do one of three things:
  - Copy and paste a list of student E Numbers into the [Keywords \(First Name, Last Name, E-mail, Student ID\)](#) box (up to 100 E Numbers). E Numbers must only be separated by spaces (no commas or semicolons required). To copy and paste from an excel spreadsheet, select the cells containing E numbers in the spreadsheet, right click and copy, then right click and paste into the [Keywords \(First Name, Last Name, E-mail, Student ID\)](#) box.
  - Upload a student list (see the Upload a Student List guide) first. Under Student Information, click inside the [Student List \(In Any of These\)](#) box. Select the name of the appropriate list from the drop-down menu.

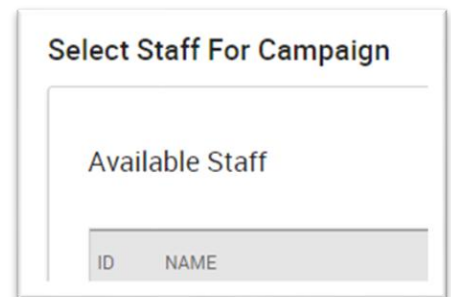
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- Input parameters under *Student Information, Enrollment History, Area of Study, Term Data, Performance Data, Course Data, Assigned To,* and/or *Success Indicators.*
- Click *Search*.
- Review the search parameters at the top of the returned result page. If needed, click *Modify Search* to add, remove, or edit search parameters.
- Review the returned student list. Select students by clicking the boxes next to individual students' names or by clicking the *ALL* checkbox at the top of the list. If the list contains more than 1000 students, click *1000 items on this page are selected. [Select all 1001 items](#)* to select all recipients in the list.
- Click *Continue*.
- On the *Verify Recipients* page, review students in the campaign and double check the recipient list.
  - To delete students, click the check box next to their name, click *Actions* at the top left of the list, and click *Remove Selected Users*.
  - To add more students to the campaign, click *Add More Students* at the bottom left of the page.
- Click *Continue*.

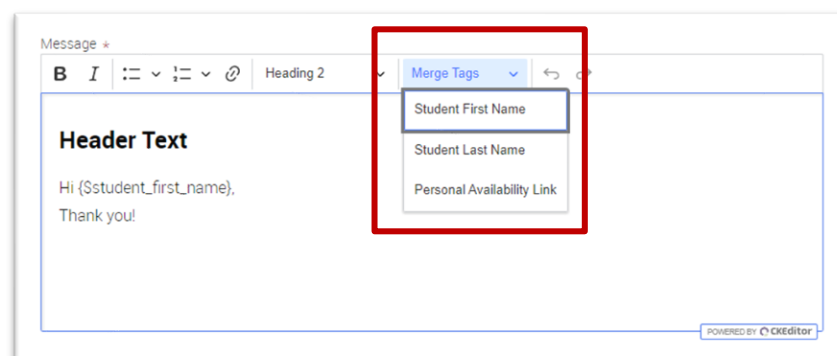
### 5. Add organizers to the campaign

- The *Select Staff* page will list all advisors who have created campaign availability for this location. Select the appropriate advisor(s) by clicking the checkbox next to their name.
  - **NOTE:** If you have not created campaign availability, this is a great place to *Save and Exit*, go create *Campaign Availability*, and return to building your campaign.
- Click *Continue*.



### 6. Compose an email message for the campaign and nudges

- Under *Nudges*, click *Add Nudge*.
- On the new page that loads, under *Add Nudge* enter:
  - Subject: choose a catchy subject line for the email
  - Message: Remove or change the *Register Today* header. Edit the message to include additional information.



- **NOTE:** Some merge tags will be auto-filled in the message. Use others as needed by copying and pasting the entire merge tag. Example: `{Student_last_name}`. To add additional *Merge Tags*, select the drop down menu in the message ribbon to insert *Merge*

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*Tags* such as a student's first or last name, your [Personal Availability Link](#), your email signature if you have created one, etc.

[Attachment](#): add attachment(s) as desired

[Send Date](#): select the initial date for the email to be sent to students

- Under [Preview Email](#), review the email as it will appear to students. Edit for formatting in the [Add Nudge](#) pane as desired.
  - **NOTE:** If for use as an Enrollment Campaign, copy the text of the email in the [Add Nudge](#) box to be reused for additional nudges as desired.
    - If not for use as an Enrollment Campaign (ex: if using for outreach for graduation, satisfaction surveys, or other links) do not add additional nudges. Additional nudges will go to students who have not enrolled in the term defined in Step 2 (which may be all students even if they have clicked the link)
- Click [Save Nudge](#).
- If for use as an Enrollment Campaign, more nudges may be scheduled by clicking [Add Nudge](#). Continue to add as many nudge reminder emails on as many dates as benefits the campaign goals.
  - **OPTIONAL:** Click [Add Success Message](#) only if using as an Enrollment Campaign. Success Messages are sent to students 24 hours after they have enrolled in the term defined in Step 2. If adding a Success Message, enter:
    - [Subject](#): choose a catchy subject line for the email
    - [Message](#): if desired, remove or change the [Thank you for Registering](#) header and the [You have now been registered for the {\\$term} term](#) sentence. Edit the message to include any additional information.
      - **NOTE:** Some merge tags will be auto-filled in the message. Use others as needed by copying and pasting the entire merger tag into the message or subject line. Example: [{\\$student\\_last\\_name}](#)
- [Attachment](#): add attachment(s) as desired
- Click [Save Success Message](#).

### 7. Verify and start the campaign email

- Review the defined campaign, composed message, recipient and staff list, and welcome message/nudges.
- To save and send later, click [Save and Exit](#).
- To start the campaign, click [Start Campaign](#).

The screenshot shows a navigation bar with five steps: 'Define Campaign', 'Verify Recipients', 'Select Staff', 'Compose Nudges', and 'Verify and Start'. The 'Verify and Start' step is highlighted with a blue border. Below the navigation bar is a section titled 'Verify & Start' containing a 'Campaign Summary' box and a prominent blue 'Start Campaign' button.