
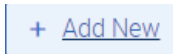


Navigate360: Using Messaging Campaigns

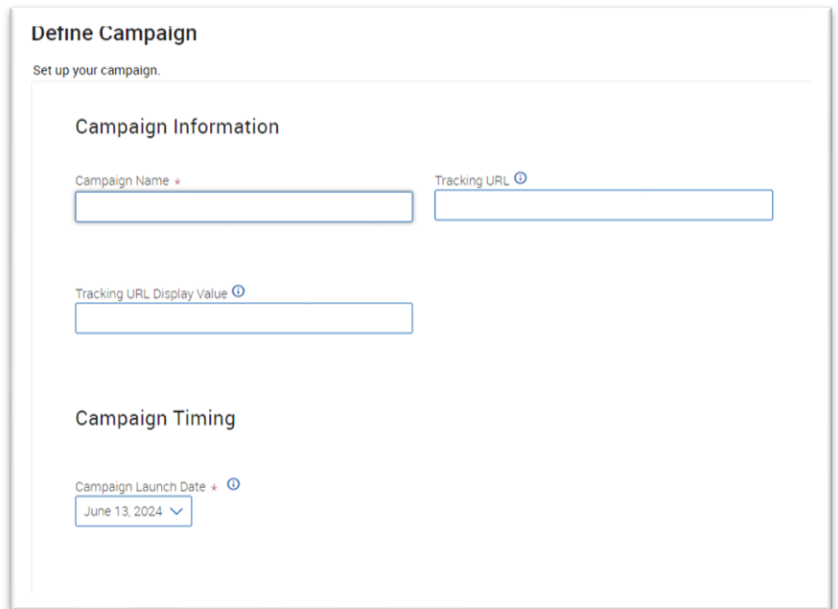
Messaging campaigns emails or texts a group of students on specified dates about certain things they may need to do or attend

1. Initiate a new messaging 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 *Messaging Campaigns*.

2. Define the messaging 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 2024 Download the Navigate Student App- RDS*
 - ***Tracking URL***: the URL you want students to click.
 - ***Tracking URL Display Value***: the text students will see in an email message encouraging them to take action. When students click the text, they go to the *Tracking URL*.
 - **EXAMPLE:** *Navigate Student App*
 - ***Campaign Timing***: select the campaign launch date.
- Click *Continue*.



Define Campaign
Set up your campaign.

Campaign Information

Campaign Name

Tracking URL

Tracking URL Display Value

Campaign Timing

Campaign Launch Date

3. 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.

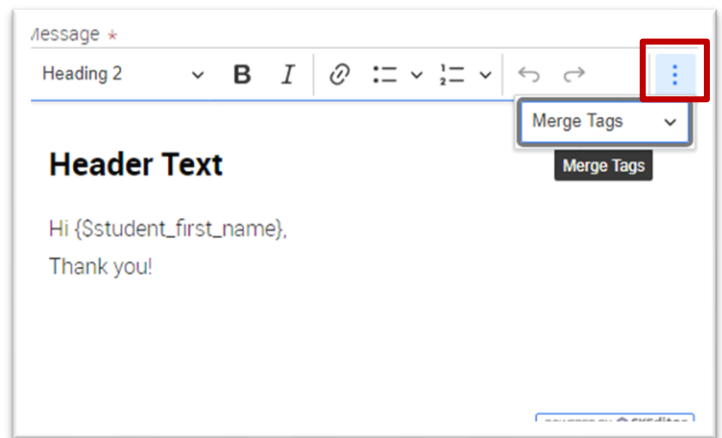
Navigate360: Using Messaging Campaigns

Messaging campaigns emails or texts a group of students on specified dates about certain things they may need to do or attend

- 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*.

4. Compose a welcome message for the campaign

- Under *Nudges*, click *Add Welcome Message*.
 - On the new page that loads, choose a *Nudge Type*
 - Under *Add Nudge* enter:
 - Subject: choose a catchy subject line for the email
 - Message: Remove or change the *Header Text*. 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_first_name}`. To add additional *Merge Tags*, select the *kebab menu* in the message ribbon to insert *Merge 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: the welcome message date is the campaign launch date
- Under *Preview*, review the message as it will appear to students. Edit for formatting in the *Add Nudge* pane as desired.
- Click *Save Welcome Message*.
 - **OPTIONAL**: More nudges may be scheduled by clicking *Add Nudge*. Continue to add as many nudge reminder on as many dates as benefits the campaign goals. Adding additional nudges allows users to pick specific *Send Dates*.
- Click *Continue*.



Navigate360: Using Messaging Campaigns

Messaging campaigns emails or texts a group of students on specified dates about certain things they may need to do or attend

5. Verify and start the campaign

- 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](#).

[Define Campaign](#) — [Select Recipients](#) — [Compose Nudges](#) — [Verify and Start](#)

Confirm & Send

Campaign Summary

| | |
|------------------------|---|
| Define Campaign | Name: test |
| | Tracking URL: N/A |
| | Tracking URL Text: N/A |
| <hr/> | |
| Sender | Rachel Swatzell (she/her) |
| <hr/> | |
| Recipients | View 0 recipients |
| <hr/> | |
| Welcome Message | Send Date: Day added |
| | Subject: test |
| | Email Preview: View Email |

[Start Campaign](#)