



Campaign User Guide

Remember: All information you enter into T-Claw Navigate360 becomes a part of students' official academic record. Students have the legal right to review their entire academic record.

Launching an Email Messaging Campaign

This workflow guide covers how to create and launch an Email Campaign. Email Campaigns are a new type of Navigate campaign that allows your school to email a group of students on specified dates about things they need to do or activities they need to attend. This type of campaign has no objective, unlike Appointment or Enrollment Campaigns, so students receive all emails in the campaign.

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Email Campaigns and Navigate

Email Campaigns are a critical part of Navigate workflow. Strategic questions should be asked when creating email campaigns, such as:

- How would you like to impact your students with campaigns? What student populations do you envision this would be used for?
- Who should be launching campaigns? Should campaigns be part of each staff member's personal workflow? Or should they be more centralized and launched by unit leaders?
- What guidance do you plan to give to your staff as far as follow-up?

Launching an Email Campaign

To begin, open the **Campaigns** page and select **Add New** from the Email Campaigns section.

Campaigns

Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

[Appointment Campaigns](#)

Allows staff reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

[+ Add New](#)

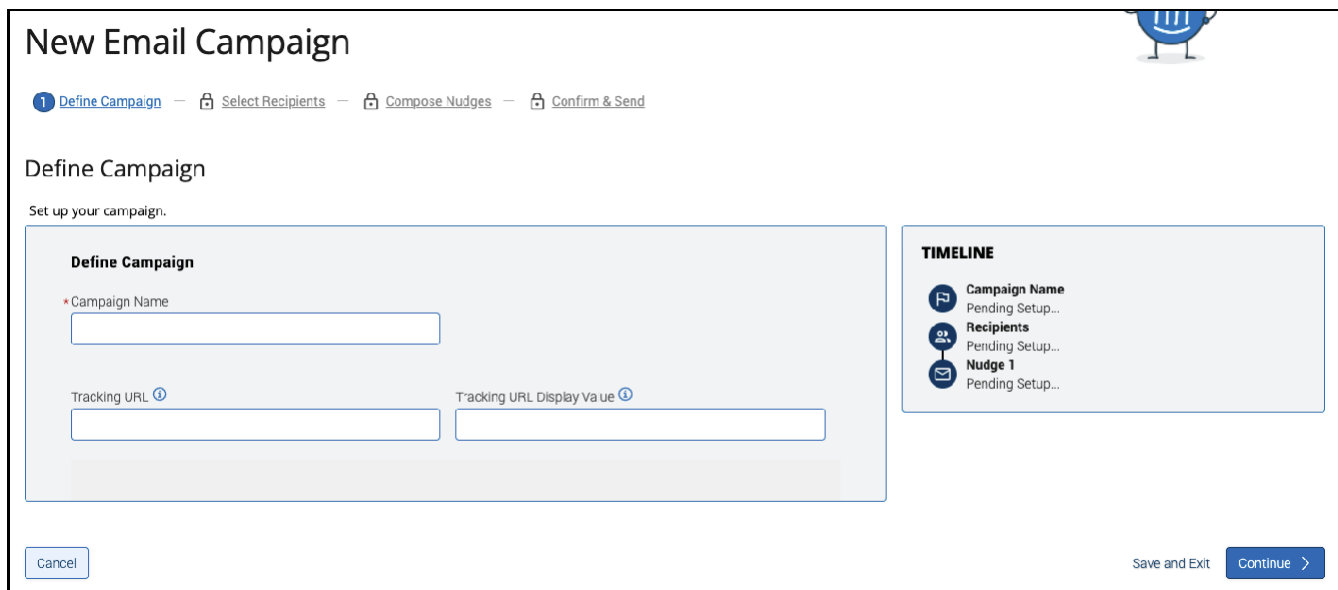
[Email Campaigns](#)

Email a group of students on specified dates about certain things they may need to do or attend.

[+ Add New](#)

Define the Campaign

The **New Email Campaign** page opens. Now you set the criteria for the Email Campaign. The fields that must be filled out are listed and defined below.



New Email Campaign

1 Define Campaign — Select Recipients — Compose Nudges — Confirm & Send

Define Campaign

Set up your campaign.

Define Campaign

* Campaign Name

Tracking URL ⓘ

Tracking URL Display Value ⓘ

TIMELINE

- Campaign Name**
Pending Setup...
- Recipients**
Pending Setup...
- Nudge 1**
Pending Setup...

Cancel Save and Exit Continue >

Campaign Name

Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student. Make sure that you adhere to your institution's naming policy, otherwise other users will not be able to evaluate the impact of your campaigns.

Note. Start campaign names with the most important info. Academic term is the most important!. Some formats could include: Term, Population, Purpose; Term, Population, College, Purpose; Term, College, Purpose, Last name of user who created the campaign. Examples include: "F19 Freshmen Reg Campaign", "F20 1st Time Freshmen Business 15-to-finish", or "S21 Freshmen Bio Major Decl, J. Smith"

Tracking URL

The URL you want students to click. This can be any URL, but you probably want it to take students directly to a registration site.

Tracking URL Display Value

The text students will see in the email message encouraging them to enroll. When students click the text, they go to the Tracking URL

Add Students to Campaign

The next step is performing a search to find recipients for the campaign. Set your criteria and perform the Advanced Search. The search results page appears.

Add Students To Campaign

Unsaved Student Search [Save](#)

Enrollment Terms: Term 1 2022, Term 5 2022, OR Term 3 2022 x

Search

Modify Search

Actions ▾

<input type="checkbox"/>	NAME	ID
1. <input type="checkbox"/>	Aagaard, Dale	448374955
2. <input type="checkbox"/>	Aas, Cassius	1077752
3. <input type="checkbox"/>	Student 2, Prospective	
4. <input type="checkbox"/>	Student 3, Prospective	
5. <input type="checkbox"/>	Student 4, Prospective	
6. <input type="checkbox"/>	Student 5, Prospective	
7. <input type="checkbox"/>	Testing 1011, Student: 1011	STD1011
8. <input type="checkbox"/>	Testing 1060, Student: 1060	STD1060

Previous

1

Next

25 total results

TIMELINE

- Name: Jen's Cool Campaign**
- Recipients**
Pending Setup...
- Nudge 1**
Pending Setup...

Support

Select the students to add to the campaign and click **Continue**. You may also save this search if you want. Once you've gone to the next step, this list is static and does not update.

Review the students on the next page. If a student should not be in the campaign, select the box next to their name and choose **Remove Students from Campaign** from the **Actions** menu.

Review Students In Campaign

Actions ▴

Remove Selected Users

<input type="checkbox"/>	NAME
<input type="checkbox"/>	Aas, Cassius
<input checked="" type="checkbox"/>	beet win, spece inn
<input type="checkbox"/>	Student 2, Prospective
<input type="checkbox"/>	Student 3, Prospective

Once finished, click **Continue**.

Add Nudges

Nudges allow for more communication from your school to students during an Email Campaign. Each nudge is an email sent to your campaign list. Nudge emails are sent the morning of the date chosen when you create the nudge. As with any email, some may be slightly delayed.

To create a nudge, define your campaign and create your list of students for the Email Campaign. The Nudges page opens.

Click **Add Nudge** to create your first nudge. You must create at least one nudge per campaign; however, you can create more. There are no limits on how many nudges you can send.

Enter a subject line and customize the message. The available Merge Tags are listed under the *Message* text box. You can see a preview of the message in a panel right of the composition panel. You can also attach a file to this message.

Fields used in the message composition are:

Email Subject

The subject of the nudge email going to the student.

Message

The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field.

Send Date

The date the email nudge is sent. The nudge with the earliest date starts your Email Campaign.

After creating a nudge, click **Save Nudge** to continue. You may continue creating nudges after this.

Important. Your Email Campaign "ends" when your last message is sent. However, you can continue to add Nudges after the last message is sent, if this is helpful to your Email Campaign.

Confirm and Send

Review your campaign details, nudges, invitees, and advisors on this page.

Email Campaign: Pell-Eligible Students

✓ Define Campaign — ✓ Verify Recipients — ✓ Compose Nudges — 4 Confirm & Send

Confirm & Send

Define Campaign	Name:	Pell-Eligible Students
	Tracking URL:	https://www.archive.org
	Tracking URL Text:	Get started here
Sender	Support 255	
Recipients	View 25 recipients	
Nudge 1	Send Date:	Mon 04/25/2022
	Subject:	Don't Miss Out on Aid
	Email Preview:	View Email

< Back Save and Exit [Start Campaign](#)

Click **Start Campaign** when you are ready to email the invites to the selected students.



TEXAS SOUTHERN UNIVERSITY



Launching an Appointment Campaign

Intro: This workflow guide covers how to create and launch an appointment campaign.

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 - [Verify and Start](#)

Appointment Campaigns and Navigate360

Appointment Campaigns are a critical part of Navigate360 workflow. Strategic questions should be asked when creating appointment campaigns, such as:

- How would you like to impact your students with campaigns? What student populations do you envision this would be used for?
Who should be launching campaigns? Should campaigns be part of each staff member's
- What guidance do you plan to give to your staff as far as follow-up? If a student does not respond, when is an appropriate time to resend invitation, send email, or text?

Launching an Appointment Campaign

To begin, open the **Campaigns** page and select **Add New** from the Appointment Campaigns section.

Appointment Campaigns

Allows staff to reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

+ Add New

Define the Campaign

The **New Appointment Campaign** page opens. Now you set the criteria for the Appointment Campaign. The fields that must be filled out are listed and defined below.

Note. If other staff are going to be included on this campaign, the reason/location/date range **must** align with Campaign Availability for the advisors that are going to be included in the campaign if you want them to be available.



Appointment Limit

How many appointments you want students to schedule during the campaign.

Appointment Length

Slots per Time

Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment. The maximum number of slots is 500.

Allow Scheduling Over Courses

If checked, this box lets students schedule over course conflicts. *Course conflicts* refers to time slots where either the potential organizer or the student have conflicts due to either instructions or enrollments.

Staff Reminders

These checkboxes select what kinds of Appointment Campaign notifications the staff attached to the campaign will receive. The two options are Email and Text.

Recipient Reminders

These checkboxes select what kinds of Appointment Campaign notifications the campaign recipients (usually students) will receive. The two options are Email and Text.

Start and End Date

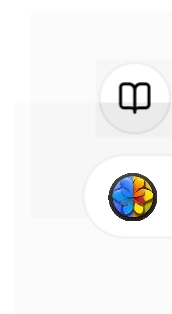
The date range that you want students make campaign appointments for.

Note. Campaigns are *Care Unit specific*, meaning they are located within a Care Unit and appointments scheduled through the Campaign will be under one specific Care Unit/Location. Appointment Campaigns *cannot* be associated with multiple Locations or Care Units.

Add Students to Campaign

After entering the details on the Define Campaign page, click **Continue**.

Your next step is adding recipients. If you created this campaign directly from a Student List or Saved Search, you are asked to review your students. If not, an Advanced Search opens.



New Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID) ?

Student Information First Name, Last Name, Student ID, Category, Tag, Student List ▾

Enrollment History Enrollment Terms ▾

Area of Study College/School, Degree, Concentration, Major ▾

Term Data Classification, Term GPA ▾

Performance Data GPA, Hours, Credits ▾

Course Data Course, Section, Status ▾

You have several ways to search for and select your students. If you want to use this campaign with an automation, you can move to the next step. Review the [Automated Actions](#) article to understand how to add students to an Appointment Campaign this way. If you are not using campaign automation, you can add all students assigned to you to a campaign using the *Invite All My Assigned Students* option. The other option is an Advanced Search. Use Advanced Search filters to find and select students.

After starting the search, you are presented with a list of students. Select the students you wish to add and then choose **Add Selected Users and Search for More** from the actions menu.

You can remove students from the campaign if needed and add more later. For example, if you met with one of the students already and don't need them to come in during the campaign period, they can be removed.

Once finished, click **Continue** to move to the next page. You are asked to review the students in the campaign IF you have added students. If these are correct, click **Continue**.

Actions ▾

☐ NAME

☐ Anderson, Will

☐ Bessey, Erin

☐ Buccino, Claudia

☐ Cambron, Claudia

☐ Jollie, Kelton

[< Back](#)

[Add More Recipients](#)

[Save and Exit](#)

[Continue >](#)

Add Staff to Campaign

Next, you need to choose Organizers for the campaign. You must select yourself. To be added to the campaign as an Organizer, you must have an Advisor or Tutor User Type. You can also select additional staff to make them available for appointments based on your role permissions.

Important. Staff must have availability defined before they can be added to an Appointment Campaign. If you do not see staff you expected to have availability, make sure their calendars and availability are up-to-date.

If there are staff that do not set Campaign Availabilities who need to be included in the campaign, select the **Include Appointment Availabilities** options to show available advisors.

Include Appointment Availabilities

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	Serena Moon	For: Appointments/Drop-Ins/Campaigns Mon, Wed, Fri 9:00am - 5:00pm ET For: Appointments/Campaigns Tue 8:00am - 5:00pm ET

< Back

Save and Exit

Continue >

Add staff to the campaign and click **Continue**.

Add Welcome Message, Nudges, and Success Message

Note. Welcome messages are the first nudge sent to students. They are sent when the student is added to the campaign or at the start of the campaign.

Nudges replace the Compose a Message functionality and allows for more communication from your school to students during an Appointment Campaign. Each nudge is an email or SMS message sent to your campaign list. You can customize the message sent to the student; however, the link and link text will always be the URL and text set in the first step of the Appointment Campaign.

Nudge emails and SMS messages are sent the morning of the date chosen when you create the nudge. Welcome messages send immediately after starting the appointment campaign. As with any email or text, some may be slightly delayed.

To create a nudge, define your campaign and create your list of students for the Appointment Campaign. The Nudges page opens.

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

+ [Add Welcome Message](#)



There are currently no nudges

Success Message (Optional)

What would you like to say to your recipients if they complete your objective? This message will be sent within a day of the recipient scheduling all campaign appointments or events. The success message is for communication purposes only and will not be included in campaign metrics.

+ [Add Success Message](#)



No success message specified for this campaign.

< Back

Save and Exit

Continue >

Click **Add Welcome Message** to create your first nudge.

You have a choice to create either an Email nudge or an SMS nudge. You must create at least one nudge per campaign. The nudge can be either an email or an SMS. There are no limits on how many nudges you can send. Only one nudge type (email or SMS) can be sent per day.

For email messages, select the *Email* nudge type.

Nudge Type



Email



SMS

file to this message.

Warning. Do not remove the schedule link from the email body.



Enter a subject line and customize the message. The available Merge Tags are listed under the *Message* text box. You can see a preview of the message in a panel right of the composition panel.

Compose Message

Subject *

{Student_first_name}, Schedule an Advising appointment

Message *

Heading 2



B

I



Please Schedule Your Advising Appointment.

Hello {Student_first_name}:

Please schedule an appointment for Academic Planning at Academic Advising Center. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{Schedule_link}

Thank you!

Attachments

Drag & Drop your files or Browse

Welcome Message Date: 07/11/2023

Powered by PQINA

Nudge Dates:

* Specific Dates:

07/11/2023

* Relative intervals after added to campaign:

N/A

Preview Email

Andrew, Schedule an Advising appointment



Please Schedule Your Advising Appointment.

Hello Andrew:

Please schedule an appointment for Academic Planning at Academic Advising Center. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

[Schedule an Appointment](#)

You can also copy and paste this address into your web browser.
<https://woodley-qa-grey-mt.gradesfirst.com/a/123456>

Thank you!



Cancel

Save Welcome Message >

Fields used in the message composition are:

Email Subject

The subject of the nudge email going to the student. It is Schedule an Appointment by default.

Message

The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field.

Send Date

The date the email nudge is sent. This does not apply to the Welcome Message

After creating a nudge, click **Save Nudge** to continue.

Save Welcome Message >

For an SMS, select the *SMS* nudge type. A similar page with more limited options displays.

Compose SMS

Message ✖

Please schedule an appointment
{\${schedule_link}}

Available Merge Tags ⓘ

{\${schedule_link}}

Inserts a link to schedule the appointment.

Send Date ▼ ⓘ

July 21, 2023 ▼

Previous Nudge Dates:

N/A

Current Nudge Dates:

N/A

Preview SMS

Message ✖

Please schedule an appointment
<https://withbehaus.com/appointments?i=6b0c0m/schedule/14567>

87 / 100

SMS nudges for Appointment Campaigns are automatically generated. Set a send date, and click **Save Nudge**. Note that you may only send out one nudge a day. You may continue creating nudges after this.

For nudges that are sent after the welcome message, you can send the nudge on a specific date or a relative date. Follow-up nudge messages are only sent to students who have not scheduled their campaign appointments.

February 6, 2024



Nudge Dates:

* Specific Dates:
02/06/2024

* Relative intervals after added to
campaign:
N/A

Sending on a specific date is more useful if you have a narrow, time-bound campaign that will not add many (if any) new students. If a student is added after a specific date nudge, they do not receive the nudge.

A relative date may be more helpful if you are using an automated action to add students to the campaign, or if you will be adding new students to a campaign regularly. This allows you to send a nudge X number of days after being added to the campaign based on what you enter in the *Send Offset* field.

Send Date * 



Specific Date



Relative Date

Send Offset *

3

Number of days after a Recipient is added to
the campaign

You can also create a Success Message on the Nudges step of an Appointment Campaign. This is an email or SMS message sent the day after the recipient schedules all appointments for the campaign. It is for communication purposes only. Click **Add Success Message** to start creating a Success Message.

[+ Add Success Message](#)



No success message specified for this campaign.







The **Add Success Message** page is like the Add Nudge page; however, there is no Send Date because the Success Message only sends after the student schedules an appointment. You may also use merge tags when writing your Success Message.

Add Success Message

Compose Message

Subject: +
Thank You For scheduling Your Appointment

Message: +


B *I* U     Paragraph Merge Tags  

+ {{Student_First_Name}}
Thank you for scheduling your appointment.
Thank you!

Available Merge Tags ⓘ


{{student_name}}	Inserts the first name and last name of the student.
{{student_first_name}}	Inserts the student's first name.
{{student_last_name}}	Inserts the student's last name.

Add Attachment:


 [Choose File](#) No file chosen

Preview Email

Thank You For Scheduling Your Appointment


EAB

Hi Andrew,
Thank you for scheduling your appointment.
Thank you!


NAVIGATE

After you have finished composing your message, it's time to send out your campaign!

Verify and Start

Review your campaign details, nudges, invitees, and advisors on this page.



Details	
Location:	W. Center for Success
Service:	Career Advising
Appointment Limit:	1
Appointment Length:	30 mins
Slot Per Time:	1
Scheduling Window:	07/24/2023 - 08/07/2023
Staff Reminders:	Email: Yes Text: Yes
Request Reminders:	Email: Yes Text: Yes
Recipients	View Recipients
Staff	View Staff
<hr/>	
Welcome Message	Send Date: Mon 6/24/2023
Subject:	Successful First Meeting, Schedule a VL Advising appointment
Email Preview:	View Email
Success Message	Subject: Thank you for scheduling your appointment
Success Message Preview:	View Email
<hr/>	
Back	View and Edit Start Campaign

Click **Start Campaign** when you are ready to email the invites to the selected students.



TEXAS SOUTHERN UNIVERSITY



Launching an Enrollment Campaign

Intro: This workflow guide covers how to create and launch an Enrollment Campaign. These campaigns are intended to be used by staff for outreach that helps enroll more students on time. Enrollment Campaigns allow staff to identify students that have not yet enrolled in an upcoming term, send those students a personalized message, track click to open rate, and track if those students are enrolled in the upcoming term.

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 - [Add Students to Campaign](#)
 - [Compose Nudges](#)
 - [Confirm and Send](#)

Launching an Enrollment Campaign

To begin, open the **Campaigns** page and click the **Add New** button in the **Enrollment Campaigns** section. The **New Enrollment Campaign** page opens.

Define the Campaign

Define the Enrollment Campaign much as you would other student-facing campaign types. Enter the Campaign Name, Desired Enrollment Term, Tracking URL, Tracking URL Display Value, and the Campaign Launch and End Dates.

Define Campaign

Set up your campaign. Specify your campaign objectives, desired actions and timing.

Campaign Objective

Campaign Name *

Early Fall Enrollment 24

Desired Enrollment Term *

Fall 2024

Tracking URL *

https://www.eab.com

Tracking URL Display Value *

Register Here

Campaign Timing

Your campaign will automatically begin on the date defined below.

Campaign Launch Date *

February 26, 2024

Campaign End Date *

April 15, 2024

Cancel

Save and Exit

Continue >

Campaign Details



Objective

Pending Setup...



Recipients

Pending



Welcome Message

Pending Setup...



Campaign Ends

Pending Setup...

Campaign Name

Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but is not visible to the student. Make sure that you adhere to your institution's naming policy, otherwise other users will not be able to evaluate the impact of your campaigns.

Desired Enrollment Term

The Term you are trying to enroll students in.

Tracking URL

The URL you want students to click. This can be any URL, but you probably want it to take students directly to a registration site.

Tracking URL Display Value

The text students will see in the email message encouraging them to enroll. When students click the text, they go to the Tracking URL

Campaign Launch Date

The date the Enrollment Campaign starts.

Campaign End Date


The date the Enrollment Campaign ends.

Add Students to Campaign

The next step is performing a search to find recipients for the campaign, unless you plan to use a campaign automation. If you plan to use an automation to add students to the campaign, skip this step.

If you are adding students via a search, set your criteria and perform the Advanced Search. The search results page appears. The term selected in the Define Campaign step is pre-selected by default for the search.

Enrollment Campaign: Early Fall Enrollment 24



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

Add Recipients To Campaign

Add Recipients to your campaign now, later, or through automation

Please note

The term selected in the Define Campaign step, Fall 2024, has been pre-selected by default.

New Search

Saved Searches

Keywords (First Name, Last Name, Email, Student ID)?

Student Information First Name, Last Name, Student ID, Category, Tag, Student List

Enrollment History Enrollment Terms

Enrollment Terms (In Any of these)	Enrollment Terms (In All of these)	Enrollment Terms (In None of these)
<div>All</div>	<div>All</div>	<div>Fall 2024</div>

Area of Study College/School, Degree, Concentration, Major

Term Data Classification, Term GPA

Campaign Details

Objective: Enroll for Fall 2024

By Mon 04/15/2024

Recipients

Pending

Welcome Message

Pending Setup...

Campaign Ends

Mon 04/15/2024

The search results page appears.

Unsaved Student Search

Not Enrolled in Terms: Fall 2024 ✕

Search [Modify Search](#)

Actions ▾

<input type="checkbox"/>	NAME	ID
93. <input type="checkbox"/>	Aanerud, Nubia	
94. <input type="checkbox"/>	Aarant, Gelsey	954463273
95. <input type="checkbox"/>	Aarant, Hova	709080754
96. <input type="checkbox"/>	Aarant, Mitali	321223552
97. <input type="checkbox"/>	Aardema, Aliya	964051890
98. <input type="checkbox"/>	Aardema, Marianne	00636128610
99. <input type="checkbox"/>	Aarhus, Alora	273710594
100. <input type="checkbox"/>	Aarhus, Arnau	780905605

Campaign Details

- Objective: Enroll for Fall 2024**
By Mon 04/15/2024
- Recipients**
Pending
- Welcome Message**
Pending Setup...
- Campaign Ends**
Mon 04/15/2024

[Support](#)

Select the students to add to the campaign and click **Continue**. You may also save this search if you want.

Review the students on the next page. To add more students to the campaign, click **Add More Students**. If a student should not be in the campaign, select the box next to their name and choose **Remove Students from Campaign** from the **Actions** menu.

Enrollment Campaign: Summer-23-Enrollees

[Define Campaign](#) —
 [Select Recipients](#) —
 [Compose Nudges](#) —
 [Confirm & Send](#)

Add Recipients To Campaign

Review Recipients in Campaign

Actions ▾

<input type="checkbox"/>	NAME
<input type="checkbox"/>	Holoman, Brancy
<input type="checkbox"/>	Johnson, Davic
<input type="checkbox"/>	Moretti, Samantha
<input type="checkbox"/>	Paradiso, Peyton
<input type="checkbox"/>	Student, Abbey2

Timeline


- Objective: Enroll for Summer II 2023**
By Wed 06/21/2023
- Recipients**
Pending Setup...
- Welcome Message**
Pending Setup...
- Campaign Ends**
Wed 06/21/2023

Once finished, click **Continue**.

Note. Welcome messages are the first nudge sent to students. They send at the start of the campaign or immediately after a student is added to the campaign (either by manually adding the student later or via a campaign automation).

Nudges allow for more communication from your school to students during an Enrollment Campaign. Each nudge is an email or SMS sent to your campaign list. Welcome messages send immediately after starting the campaign or after a student is added to the campaign manually or via an automation. Other nudge messages are sent the morning of the date chosen when you create the nudge. Some may be slightly delayed, as with any large transmission. You can customize each message sent to the student; however, the link and link text will always be the URL and text set in the first step of the Enrollment Campaign.

To create your nudges, go to the **Compose Nudges** page.




Enrollment Campaign: Fall-Latecomers-22


☒ Define Campaign — ☒ Verify Recipients — ☒ **Compose Nudges** — ☐ Confirm & Send

Compose Nudges





Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students in the campaign who have not completed the objective.

 Add Welcome Message


 There are currently no nudges


Timeline


-  **Objective: Enroll for Fall 2022**
By Fri 10/14/2022
-  **Recipients**
8
-  **Welcome Message**
Pending Setup...
-  **Campaign Ends**
Fri 10/14/2022

Success Message (Optional)


What would you like to say to your recipients if they complete your objective? This message will be sent 1 day after the recipients complete the objective. The success message is for communication purposes only and will not be included in campaign metrics.

 Add Success Message


 No success message specified for this campaign.

 Back

Save and Exit

Continue 

Click **Add Welcome Message** to create your first nudge.



Enrollment Campaign: Summer 24 Enrollment

✓ Define Campaign
✓ Verify Recipients
✚ Compose Nudges
🔒 Verify and Start

Nudge Type

☒ Email
 ☐ SMS

Add Welcome Message

Compose Email

Subject *

Message *

Heading 2 ▾ **B** *I* @ :: ▾ = ▾ ↶ ↷ ⋮

Header Text

Hi {\$student_first_name},
 {\$tracking_hyperlink}
 Thank you!

Attachments

Drag & Drop your files or Browse


Welcome Message Date: ⓘ
04/16/2024

Nudge Dates:

* Specific Dates:
N/A


* Relative intervals after added to campaign:
N/A

Preview Email



Header Text

Hi Andrew,
[Enroll Today](#).
 Thank you!


Navigate360

Cancel
Save Welcome Message >

For email messages, select the *Email* nudge type. Enter a subject line and customize the message. The available Merge Tags are listed under the *Message* text box. You can see a preview of the message in a panel right of the composition panel. You can also attach a file to this message.

Fields used in email message composition are:


The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field.

Send Date

The date the nudge is sent. This field does not appear when creating the Welcome Message, as the nudge will send immediately after starting the campaign. If you set the campaign start date for the next day or after, the first nudge sends at 10 AM Central Time of the date set. If you add students later, the send date will be immediately after they are added to the campaign. For non-Welcome Message nudges, you can send a message on a Specific Date or a Relative Date.

After creating a nudge, click **Save Welcome Message/Save Nudge** to continue. You may continue creating nudges after this.

For nudges that are sent after the welcome message, you can send the nudge on a specific date or a relative date.

Send Date * 

☒ Specific Date

☐ Relative Date

February 6, 2024

▼

Nudge Dates:

* Specific Dates:

02/06/2024

* Relative intervals after added to campaign:

N/A

Sending on a specific date is more useful if you have a narrow, time-bound campaign that will add many (if any) new students. If a student is added after a specific date nudge, they do not receive the nudge.

A relative date may be more helpful if you are using an automated action to add students to the campaign, or if you will be adding new students to a campaign regularly. This allows you to send a nudge X number of days after being added to the campaign based on what you enter in the *Send Offset* field.

Send Offset *

3

Number of days after a Recipient is added to the campaign

For an SMS, select the *SMS* nudge type. A similar page with more limited options displays.

Nudge Type
☐ Email ☒ SMS

Add Welcome Message

Compose SMS

Message *

Get a chance to enroll early for Fall '24 and save time and money!
{Scampaign_url}

AI Auto Enhance

AI Message Assistant

Available Merge Tags

{Scampaign_url}

Inserts campaign's URL for students to enroll.

Welcome Message Date:

02/26/2024

Preview SMS

Message *

Get a chance to enroll early for Fall '24 and save time and money!
https://www.eab.com

86 / 320

Cancel

Save Welcome Message >

SMS nudges are limited to 320 characters. The only merge tag is {Scampaign_url}, which inserts the campaign URL added in step one. Create your message, set a send date, and click **Save Welcome message** to save the nudge.

You may continue creating nudges after this. One nudge a day can be sent of one nudge type, so you can send, for example, an email Welcome Message first, and then follow up 3 days later with an SMS nudge, send an email nudge the day after that, and then another SMS nudge the day after that.

Enrollment Campaign: Spring-Enroll-1-Early

[Define Campaign](#) —
 [Verify Recipients](#) —
 [Compose Nudges](#) —
 [Confirm & Send](#)

Success Message Type

☒ Email
 ☐ SMS

Add Success Message

Compose Email

Subject

Message

B *I* U ~~ABC~~
 Heading 2 ▼ Merge Tags ▼ ↶ ↷

Header Text

Hi {\$student_first_name},
 {\$tracking_hyperlink}
 Thank you!

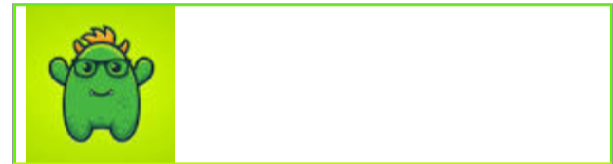
Available Merge Tags ⓘ

{student_name}	Inserts the first name and last name of the student
{student_first_name}	Inserts the student's first name
{student_last_name}	Inserts the student's last name
{tracking_hyperlink}	Inserts a link to enroll in the term
{term}	Inserts name of the term the campaign is associated with

Add Attachment:

Choose File No file chosen

Preview Email



Header Text

Hi Andrew,
[Click here to register!](#)
 Thank you!

Any Additional Questions?

Please contact your assigned Advising Center for additional information regarding this email.



[Cancel](#)
[Save Success Message >](#)

The **Add Success Message** page is like the Add Nudge page; however, there is no Send Date because the Success Message only sends after the student completes the objective. You may also use merge tags when writing your Success Message if the success message is an email.

After you finish creating Nudges, click **Continue** to go to the Confirm & Send page.

Confirm and Send

The last page is a **Confirm and Send** page. You can review all elements of your Enrollment Campaign and once you are satisfied it's correct, send the campaign to your students. If there is an

[Define Campaign](#) — [Verify Recipients](#) — [Compose Nudges](#) — [Confirm & Send](#)

Confirm & Send

Please note

Any students in this campaign who are already enrolled in Summer II 2023 and have not been sent an email will be removed from the campaign when you click 'Start Campaign'.

Campaign Summary

Define Campaign

Name: Summer-23-Enrollees
Desired Enrollment Term: Summer II 2023
Tracking URL: <https://www.example.edu>
Tracking URL Display Value: Register Here
End Date: 06/21/2023

Sender

Jen Stoy
(she/her)

Recipients

[View 5 recipients](#)

Welcome Message

Send Date: Wed 06/07/2023
Subject: Register for summer term
Email Preview: [View Email](#)

Success Message

Success Message Preview: [View SMS](#)

[< Back](#)

Save and Exit

[Start Campaign](#)

Note. Any students who are already enrolled in the term targeted for the campaign are removed from your list when you click **Start Campaign**.