

Date: 3/28/2022

**Step 1.** Launch NavigateLA

**Step 2.** Click on the “Campaigns” button in the left navigation bar



**Step 3.** In the Action Menu (located to the right), Select “Appointment Campaign”

### 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](#)

#### [Enrollment Campaigns](#)

Allows staff reach out to specific student populations and encourage them to enroll for a specific term. Enrollment Campaigns are best deployed by staff members seeking to encourage students to enroll in an upcoming term.

[+ Add New](#)

## Step 4. Define the Campaign

### Define the Campaign

4a. To define the Appointment Campaign, enter the required fields listed below.

# Appointment Campaign: Test Campaign

NAVIGATE CAL STATE LA

✓ Define Campaign — ✓ Verify Recipients — ✓ Select Staff — ✓ Compose Nudges — ✓ Verify and Start

## Define Campaign

Set up your campaign. Specify your appointment details and timing.

**a. Campaign Configurations**

\* Campaign Name:

\* Care Unit:

\* Service:

**d. Instructions or Notes for Landing Page:**

\* Location:

**f. Appointment Configurations**

\* Appointment Limit:

\* Appointment Length:

\* Slots Per Time:

**i.**  Allow Scheduling Over Courses

**j.** Staff Reminders:  Email  Text    Recipient Reminders:  Email  Text

**Scheduling Window**  
Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

\* Start Date:

\* End Date:

### TIMELINE

- Objective:** Schedule Appointment(s)  
By Mon 04/11/2022
- Recipients:** 2224
- Staff:** 1
- Nudge 1:** {Sstudent\_first\_name}, Schedule an Un...  
Mon 03/28/2022
- Campaign Ends:** Mon 04/11/2022

[Support](#)

**a. Campaign Name**

A 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 the established Campaign naming policy, otherwise, other users will not be able to evaluate the impact of your campaigns.

**b. Care Unit**

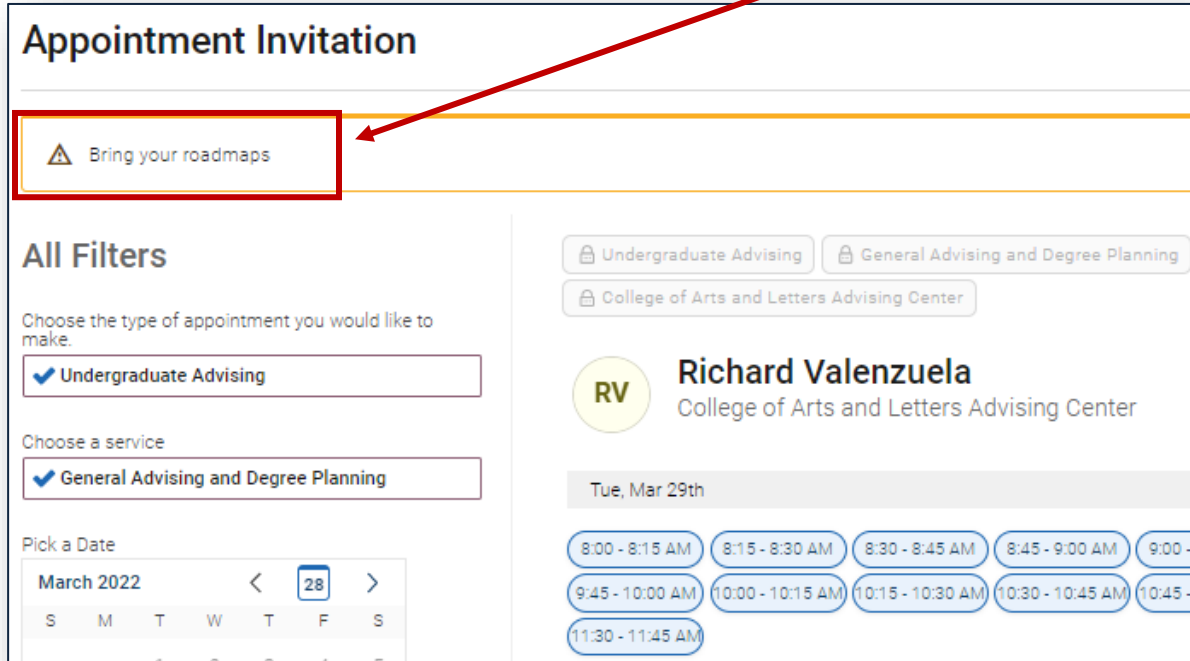
The viewable Care Unit selections are limited based on the permission the user has.

**c. Service**

The service to be used by this campaign. Options will be limited based on both the “Care Unit” and “Location settings”.

**d. Instructions or Note for Landing Page**

When students click on the campaign invite located in the golden banner, the instructions appear at the top of the campaign world view.



**e. Location**

The Center conducting this campaign. The viewable list will be limited to the Center's offering the "Service" entered in Step c.

**f. Appointment Limit**

Sets the number of meetings the student may sign-up for within this campaign.

**g. Slot Per Time**

Sets the number of visitors per meeting time. 1 means one-on-one meetings.

**h. Appointment Length**

The default time for appointments will be shown here initially.

**i. Allows Scheduling Over Courses**

When turned on, this will override the "Check for the student's course schedule", allowing for campaign meetings during the student's class time. Check with your area's administrator before enabling this feature.

**j. Reminder settings {Staff/Student}**

Sets the reminder types to be used in this campaign. Email and/or Text.

**k. Scheduling Window {Start Date/End Date}**

Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

**4b.** After entering all the Define Campaign information, click Continue.

**Step 5.** Adding students to the campaign

[Add Students to the Campaign](#)

5a. Perform a search to find recipients for the campaign.

**Appointment Campaign: Test Campaign**

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Define Campaign — Verify Recipients — Select Staff — Compose Nudges — Verify and Start

### Add Recipients To Campaign

#### New Search

Saved Searches ▾

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

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List

First Name?	Last Name?	From Last Name?	To Last Name?	Student ID?	Gender
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All

Race or Ethnicity	Student List (In Any of These)	Transfer Student
All	All	Any

E-mail(s)

Category (In Any of these)?

#### TIMELINE

- Objective: Schedule Appointment(s) By Mon 04/11/2022
- Recipients 2223
- Staff 1
- Nudge 1: ({student\_first\_name}, Schedule an Un... Mon 03/28/2022
- Campaign Ends Mon 04/11/2022

5b. In this [Advanced Search](#), select additional search criteria to focus on the specific student population targeted for this campaign.

**Appointment Campaign: Test Campaign**

NAVIGATE CAL STATE LA

Define Campaign — Verify Recipients — Select Staff — Compose Nudges — Verify and Start

### Review Recipients In Campaign

Actions ▾

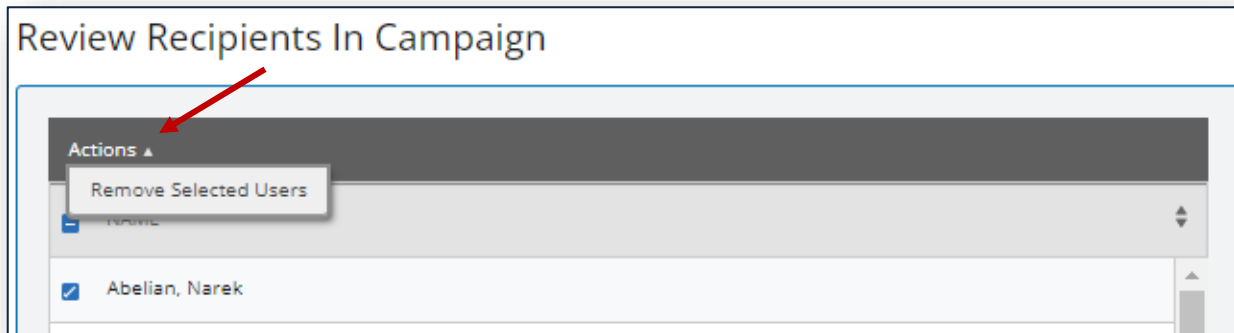
<input type="checkbox"/>	NAME
<input type="checkbox"/>	Abelian, Narek
<input type="checkbox"/>	Abioro, Olamide
<input type="checkbox"/>	Abundio, Blanca
<input type="checkbox"/>	Acevedo, Vanessa
<input type="checkbox"/>	Acevedo, Diego

#### TIMELINE

- Objective: Schedule Appointment(s) By Mon 04/11/2022
- Recipients 2224
- Staff 1
- Nudge 1: ({student\_first\_name}, Schedule an Un... Mon 03/28/2022
- Campaign Ends Mon 04/11/2022

5c. Select the students you want to add to the campaign, then click Continue. You may also save this search. This list becomes static once you progress to the next step.

- 5d. Review the selected students on the next page. If a student should not be in the campaign, select the box next to their name, then from the Actions menu choose “Remove Selected Users”.

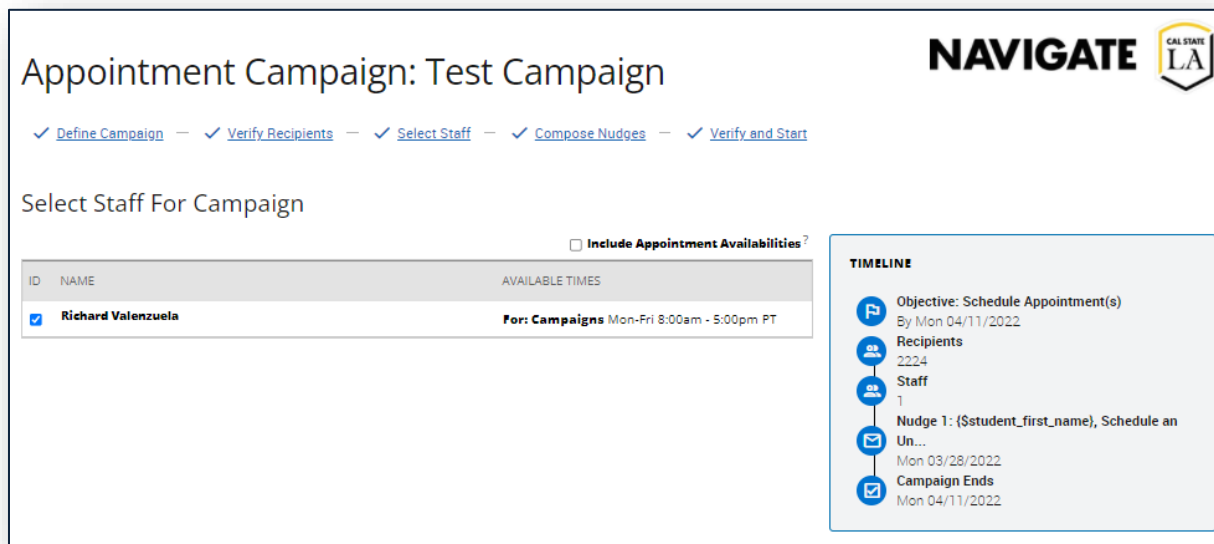


- 5e. Once finished, click Continue.

## Step 6. Select Staff for Campaign

### Add Staff to the Campaign

- 6a. Pick the staff members that will facilitate the meetings. The list will only show staff members with Campaign availabilities that match the campaign settings



- 6b. Click continue to be taken to the Nudges and Success Message page.

## Step 7. Composing Nudges & Success Messages

### Compose Nudges

- Nudges is the recurring message function that allows the organizer to select the specific dates that communications are sent to students during an Appointment Campaign. Students that make required number of appointments set in the Appointment Limit (section 4a Step f) will then stop receiving nudges.
- Nudge emails created by the Organizer are sent the morning of the date selected for each nudge.

**Appointment Campaign: Test Campaign**

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### 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 who have not scheduled all appointments in the campaign.

+ Add Nudge

Send Date: 03/28/2022

Email Subject: {Student\_first\_name}, Schedule an Undergraduate Advising appointment

Email Message: Please schedule your Undergraduate Advising app...

### 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 recipients scheduling all campaign appointments. 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.

### TIMELINE

- Objective: Schedule Appointment(s)  
By Mon 04/11/2022
- Recipients  
2224
- Staff  
1
- Nudge 1: {Student\_first\_name}, Schedule an Un...  
Mon 03/28/2022
- Campaign Ends  
Mon 04/11/2022

- 7a. Click “Add Nudge” to create your first nudge. You must create at least one nudge per campaign; however, you can create additional nudges for the same campaign. There is no limit to the number of nudges that can be created for a specific campaign, but you can only send 1 nudge per day, per campaign.
- 7b. Enter a subject line and custom message. The available Merge Tags are listed under the *Message* text box. A preview of the message is displayed in the panel to the right of the composition box. Attachments may be added to the message.

*Fields used in the message composition are the following:*

- 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 will essentially start your Appointment Campaign.

### Add Nudge

**Subject**

**Message**

**B I** [List Bullets] [List Numbered] [Link] | Heading 2 | Merge Tags | [Undo] [Redo]

**Please Schedule Your Undergraduate Advising Appointment.**

**Hello {student\_first\_name}:**

Please schedule an appointment for General Advising and Degree Planning at College of Arts and Letters 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.

**Available Merge Tags**

{student_first_name}	Inserts the student's first name
{student_last_name}	Inserts the student's last name
{schedule_link}	Inserts a link to schedule the appointment

**Add Attachment:**

No file chosen

**Send Date**

Previous Nudge Dates: 03/28/2022

### Preview Email

**Andrew, Schedule An Undergraduate Advising Appointment**

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**NAVIGATE**

Please Schedule Your Undergraduate Advising Ap

**Hello Andrew:**

Please schedule an appointment for General Advising and Degree Planni Arts and Letters Advising Center. To do so, please click the following link, works with your schedule, and click Save. You will receive an email confir appointment time and details.

[Schedule an Appointment](#)

Thank you!

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- 7c. After creating a nudge, click “Save Nudge” to continue. You may create additional nudges after this step.
- 7d. You can also create a Success Message on the Nudges step of an Appointment Campaign. This is an email sent the day after the recipient completes the objective. It is for communication purposes only. Click “Add Success Message” to start creating a Success Message.

# Appointment Campaign: Test Campaign

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## Add Success Message

\*Subject  
Thank You For Scheduling Your Appointment

\*Message

**B** *I* | | | | Paragraph | Merge Tags | |

Hi {\$student\_first\_name},  
Thank you for scheduling your appointment  
Thank you!

**Available Merge Tags** ⓘ

{ \$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**

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**NAVIGATE**

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

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NAVIGATE

- 7e. The Add Success Message page is like the Add Nudge page; however, there is no Send Date because the Success Message is only sent after the student completes the objective. You may also use the merge tags to personalize the message.
- 7f. After you finish creating Nudges, click Continue to go to the **Confirm & Send** page.




## Step 8. Completing the Campaign

### Confirm and Send

8a. The last step is the **Confirm and Send** page. Here you can review all elements of your Appointment Campaign. Once you have confirmed that all is correct, you may send the campaign to your students.

**Note:** If there is an error preventing you from sending the campaign, an error message will appear on this page.

# Appointment Campaign: Test Campaign

**NAVIGATE** 

[✓ Define Campaign](#) - [✓ Verify Recipients](#) - [✓ Select Staff](#) - [✓ Compose Nudges](#) - [✓ Verify and Start](#)

## Verify & Start

<b>Define Campaign</b>	Name:	Test Campaign
	Instructions or Notes for Landing Page:	Bring your roadmaps
	Care Unit:	Undergraduate Advising
	Location:	College of Arts and Letters Advising Center
	Service:	General Advising and Degree Planning
	Appointment Limit:	1
	Appointment Length:	15 mins
	Slots Per Time:	1
	Scheduling Window:	03/28/2022 - 04/11/2022
	Allow Scheduling Over Courses:	No
	Staff Reminders:	Email - No   Text - No
	Recipient Reminders:	Email - No   Text - No

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<b>Recipients</b>	<a href="#">View 2224 recipients</a>
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<b>Staff</b>	<a href="#">View 1 staff</a>
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<b>Nudge 1</b>	Send Date:	Mon 03/28/2022
	Subject:	{Student_first_name}, Schedule an Undergraduate Advising appointment
	Email Preview:	<a href="#">View Email</a>

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<b>Success Message</b>	Subject:	Thank You For Scheduling Your Appointment
	Email Preview:	<a href="#">View Email</a>

8b. If you wish to send the campaign at a later date, click Save and Exit.

7c. If you are ready to send the campaign, click Start Campaign to send to students.