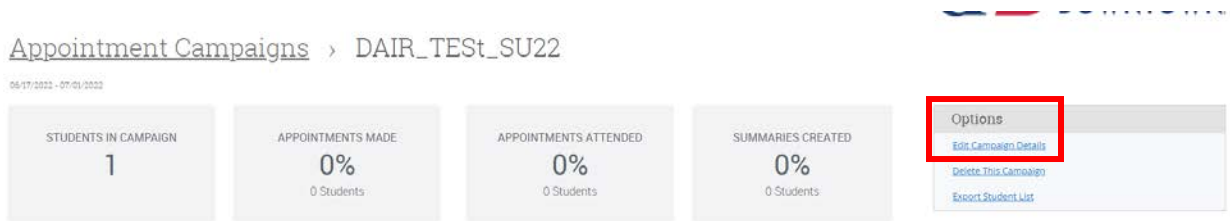


## EAB Navigate

### Adding new students to an existing campaign

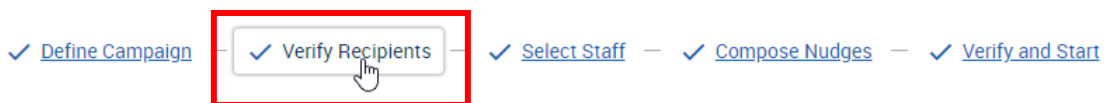
The campaign feature allows us to add students to an existing campaign, but as of recent, it can automatically designate the initial email (or ‘nudge’) to those just newly added students. The process is somewhat nested within the campaign feature, so the screenshots below will serve as a guide on doing this process.

1) Go to the campaign in question so that you are at its summary page



2) Click ‘edit campaign details’ on the right and once in the editing view, click ‘verify recipients’

### Appointment Campaign: DAIR\_TEST\_SU22



- 3) At the bottom of the list of existing participants is a button, slightly hard to see, that says 'add more participants'

## Add Recipients To Campaign

### Review Recipients in Campaign

Actions ▾

<input type="checkbox"/>	NAME
<input type="checkbox"/>	Tag, Add

[< Back](#) [Add More Recipients](#)

- 4) This button will bring up the advanced search menu which will let you search via name, id, saved list, or the fields in the search engine.

## 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

Enrollment History Enrollment Terms

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

5) Upon running the search, you will get the list of students who you can select from – to add to the campaign; it will also notify you on the bottom if any of the searched students are already in the campaign

Actions	NAME	ID
1. <input type="checkbox"/> <a href="#">Tag-Add</a>		7777777
2. <input checked="" type="checkbox"/> <a href="#">Yeghvan, Mikayel</a>		8004100

Previous 1 Next 2 total results

< Back Continue >

1 recipient is currently included in this campaign

6) After reviewing the added students, it will take you to the ‘compose message’ screen. Simply click continue on the bottom right.

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

+ Add Nudge

**Send Date:** 06/17/2022  
**Email Subject:** ({Student\_first\_name}), Schedule a Special Programs appointment  
**Email Message:** Please schedule your Special Programs appointme...

**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.

**Email Subject:** Thank You For Scheduling Your Appointment  
**Email Message:** Hi ({Student\_first\_name}), Thank you for schedul...

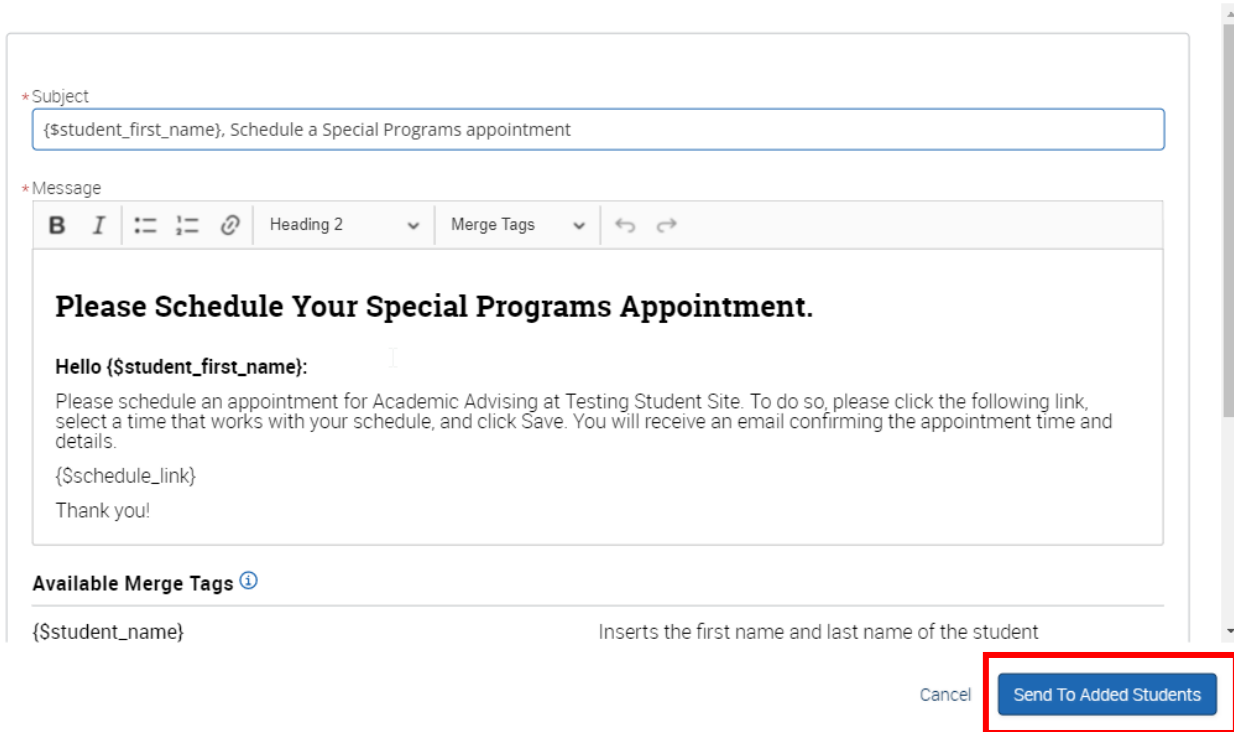
< Back Save and Exit Continue >

7) It will then take you to a screen that will notify you, at the top, that you have newly added recipients; simply click 'send nudge now' at the bottom right if you see this notification



8) You will now see a popup that shows the message is to be sent to the newly added students, with the button on the bottom right stating such

Compose Nudge Email for Newly Added Students

A "Compose Nudge Email for Newly Added Students" popup window. It features a subject line field containing "{student\_first\_name}, Schedule a Special Programs appointment". Below is a message editor with a toolbar including bold, italic, bulleted list, numbered list, link, heading 2, and merge tags. The message content reads: "Please Schedule Your Special Programs Appointment. Hello {student\_first\_name}: Please schedule an appointment for Academic Advising at Testing Student Site. 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!". At the bottom, there is an "Available Merge Tags" section with "{student\_name}" and its description "Inserts the first name and last name of the student". A "Cancel" button and a "Send To Added Students" button (highlighted with a red box) are located at the bottom right.

That is all; you will now be able to see the newly added students in the campaign overview.